

CRM Dashboard

MAIN PROJECT EXPLANATION

Opening: "Good morning/afternoon. I built a CRM Dashboard — a web app for managing customer relationships. It helps sales teams track leads, manage customers, and close deals." What the Project Does: "I made a complete CRM system. Users can log in, create and track leads, manage customers, follow deals through the pipeline, assign tasks, log activities like calls and meetings, and view reports. Admins can also use a chatbot to quickly find information." Main Purpose: "It centralizes all customer and sales data in one place so teams don't need multiple tools."

FEATURES EXPLAINED SIMPLY

1. LOGIN AND USER ACCOUNTS

What it does: "Users can create accounts and log in with email and password. Passwords are encrypted. There are three types of users: Admin, Manager, and Sales. Each role sees different features and can access different parts of the system." Who can use what:

- Admin: Full access, including Settings and Chatbot
 - Manager: Can view reports and manage data
 - Sales: Can manage leads, deals, and customers
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2. DASHBOARD

What it shows: "The dashboard shows important numbers at a glance:

- Total leads
- Active customers
- Open deals
- Total revenue from won deals

It also has charts showing how leads are distributed by status and revenue over time. There's a recent activities feed showing the latest actions." Why it's useful: "Users can quickly see the state of the business

without clicking around."

3. LEAD MANAGEMENT

What you can do:

- Create leads by filling in name, email, phone, source (website, referral, ads, cold call), and status
- View all leads in a table with search and filters
- Edit and update lead information
- Delete leads
- Filter by status (New, Contacted, Qualified, Lost, Converted)
- Search by name, email, or phone
- Assign leads to salespeople

Conversion:"Convert qualified leads into customers. It creates a customer record and links it to the original lead."

4. CUSTOMER MANAGEMENT

What you can do:

- Add customers with company and industry info
- View all customers
- Search customers
- View a customer's complete history: deals, activities, tasks, and notes
- Edit customer information
- Track customer status (Active/Inactive)

Customer details page:"Shows everything related to a customer in one view: basic info, deals, activities timeline, tasks, and notes."

5. DEAL PIPELINE (Kanban Board)

What it is:"A visual board showing deals in stages like a board with columns."Stages:

1. Prospect — new opportunity
1. Proposal — proposal sent
1. Negotiation — in negotiation
1. Won — deal closed successfully

1. Lost — opportunity lost

How it works: "Drag deals between columns to update their stage. Each deal shows name, value, customer, and expected close date." What you can do:

- See all deals at a glance
 - Move deals between stages by dragging
 - Click a deal to view/edit details
 - Create new deals
 - Track deal value and expected close date
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6. TASK MANAGEMENT

What you can do:

- Create tasks with title, description, and due date
- Assign tasks to team members
- Link tasks to leads, customers, or deals
- Mark tasks as Pending or Completed
- Filter tasks by status or assignee
- View all tasks in a list

Why it's useful: "Helps teams track follow-ups and to-dos related to specific leads, customers, or deals."

7. ACTIVITY LOGGING

What you can do: "Log interactions with customers and leads:

- Calls — phone conversations
- Emails — email communications
- Meetings — meetings held
- Notes — important notes
- Other — other activities

Each activity includes a title, description, and date. "Where activities appear: "They appear on the lead, customer, or deal detail pages, showing a timeline of interactions." What you can do:

- Log activities from any lead, customer, or deal page
- View all activities in one place
- Filter activities by type
- See who created each activity and when

8. REPORTS & ANALYTICS

What reports show:

- Lead conversion rate (leads converted to customers)
- Total revenue from won deals
- Sales performance by user (deals won, revenue generated, conversion rate)
- Charts and graphs for visualization

Export:"Reports can be exported to CSV for further analysis in Excel or other tools."

9. USER MANAGEMENT (Admin Only)

What admins can do:

- View all users
- Create new users
- Edit user information and roles
- Activate or deactivate users
- View user statistics (assigned leads, deals, tasks)
- Change user passwords

Why it's useful:"Admins can manage team members and control who has access to what."

10. CHATBOT ASSISTANT (Admin Only)

What it does:"An AI assistant that answers questions about the CRM using natural language."What you can ask:

- "Tell me about [user name]" — get user details and stats
- "How many leads do we have?" — get lead counts
- "What's our total revenue?" — get revenue information
- "How many customers are active?" — get customer statistics
- "Show me dashboard overview" — get summary statistics

How it works:"You type a question in natural language. It understands the question, searches the database, and returns formatted answers."Why it's useful:"Quick way to find information without navigating pages."

HOW THE SYSTEM WORKS TOGETHER

Workflow Example:

1. A new lead is created from the website.
1. A salesperson contacts the lead and logs an activity.
1. If interested, the lead is converted to a customer.
1. A deal is created and tracked through stages.
1. Tasks are created for follow-ups.
1. When the deal is won, revenue is tracked.
1. Reports show performance and conversion rates.

Everything is connected:

- Leads can become customers
 - Customers can have multiple deals
 - Deals, leads, and customers can have activities and tasks
 - All this data appears in reports
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WHAT MAKES THIS PROJECT SPECIAL

1. Everything in one place:"Instead of using multiple tools, everything is in one system — leads, customers, deals, tasks, and reports."2. Visual pipeline:"The Kanban board makes it easy to see where deals stand and move them forward."3. Complete history:"Every customer and lead has a history showing all activities and interactions."4. Smart chatbot:"Admins can quickly find information by asking questions instead of searching."5. Role-based access:"Different users see what they need based on their role."6. Easy to use:"The interface is simple so sales teams can use it without much training."

TYPICAL QUESTIONS & SIMPLE ANSWERS

Q: Who would use this system?

A: "Small to medium businesses with sales teams. Salespeople manage leads and deals, managers view reports, and admins manage users and access everything."

"Q: How does it help a business?

A: "It organizes customer data, tracks sales progress, ensures follow-ups, shows what's working, and helps teams work together better."

"Q: What's the most useful feature?

A: "The deal pipeline because you can see all opportunities at once and move them through stages. Also the complete customer history so you know everything about each customer.

"Q: Can multiple people use it at the same time?

A: "Yes, multiple users can log in and work at the same time. Each person sees their own assigned leads and deals, and managers can see everything.

"Q: How do you add new leads?

A: "Click 'New Lead', fill in the information (name, email, phone, source), assign it to a salesperson, and save. It appears in the leads list immediately.

"Q: What happens when you convert a lead to customer?

A: "The system creates a customer record with the lead's information. You can add company and industry details. The lead is marked as converted, and you can create a deal for this customer.

"Q: How do deals move through the pipeline?

A: "Start in Prospect. As you progress, drag the deal card to the next stage (Proposal, Negotiation). When finished, move to Won or Lost. Each stage tracks the deal's progress.

"Q: What can the chatbot tell you?

A: "It can tell you about any user, how many leads/customers/deals you have, revenue numbers, and dashboard statistics. Just ask in plain language.

"Q: How do you know what tasks need to be done?

A: "Go to the Tasks page. It shows all tasks with due dates. You can filter by status (Pending/Completed) or by who it's assigned to. Tasks can be linked to leads, customers, or deals.

"Q: Can you see how well the sales team is doing?

A: "Yes, the Reports page shows sales performance for each person: how many deals they have, how many won, revenue generated, and conversion rates. You can export this to Excel."