

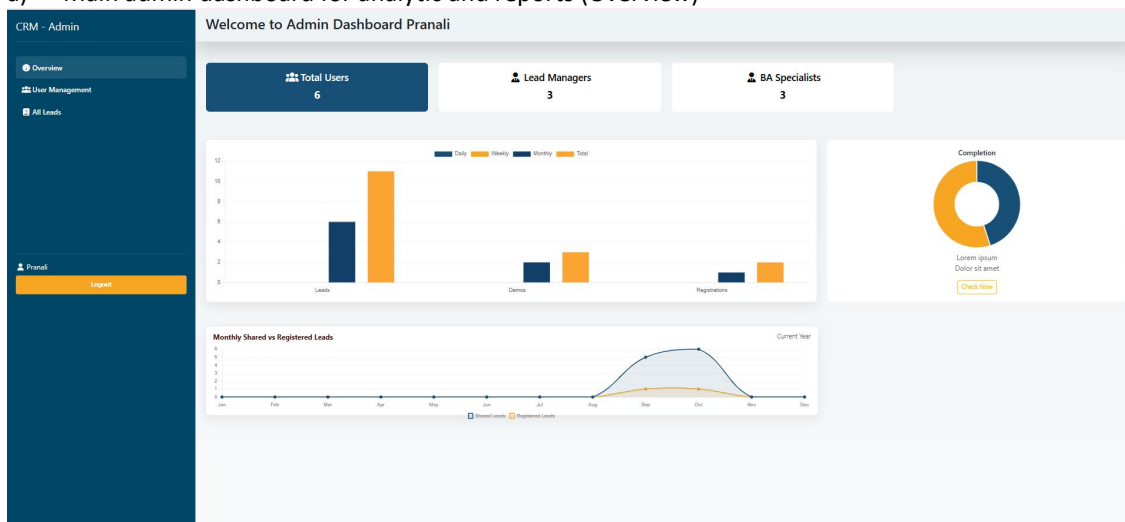
Login with Email, password and role selection(Admin, Lead Manager, BA Specialist)  
Register with Name, Email, password and Role selection(Admin, Lead Manager, BA Specialist)

This app contains three roles as Admin, Lead Manager and BA Specialist  
each role having different functionalities, dashboards and according to that screens also

Role wise implementation and functionality  
I will provide you the screenshot of each section

## 1) Admin

### a) Main admin dashboard for analytic and reports (Overview)



### b) User management section/screen-- contains the list of All users in table format with action buttons like edit, delete and add button that will opens form to add new user

CRM - Admin

Dashboard

User Management

All Leads

Pranali

Logout

User Management

Add New User

Full Name

p@gmail.com

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Select Role

Add User

ID	Name	Email	Role	Action
9	D V P Sindhar	vi@gmail.com	Lead Manager	Edit Delete
8	sharmila	sharmila@gmail.com	BA Specialist	Edit Delete
6	shrikant	si@gmail.com	BA Specialist	Edit Delete
5	gayatri	gi@gmail.com	Lead Manager	Edit Delete
4	Nikita	ni@gmail.com	BA Specialist	Edit Delete
2	achal	ai@gmail.com	Lead Manager	Edit Delete
1	Pranali	pi@gmail.com	Admin	Edit Delete

### c) All Leads screen - list of all leads in table format, advanced options like Search by name or phone or email, filter by status, search by date I.e data selection from calender, filter by feedback Export button that will export the list of leads in csv format file choose that will enable to select the csv file only from mobile storage with Import csv button

CRM - Admin

Dashboard
User Management
All Leads

Pranali
Logout

All Leads

List of all leads in the system.

Export Leads

Choose file
No file chosen
Import CSV

Search by Name, Phone, Email

Filter by Status --

dd-mm-yyyy

Filter by Feedback
Apply

Delete Selected

#	Sr. No.	Date	Name	Phone	Email	Lead Manager	BA Specialist	Status	Feedback
<input type="checkbox"/>	1	09 Oct 2025 06:19 AM	pranali	8888888889		achal	Nikita	Registered	-
<input type="checkbox"/>	2	09 Oct 2025 05:36 AM	pranali	8888888800		achal	Nikita	Demo Attended	-
<input type="checkbox"/>	3	07 Oct 2025 06:22 AM	pranali	8888888888	pi@gmail.com	achal	Nikita	Demo Attended	-
<input type="checkbox"/>	4	07 Oct 2025 06:05 AM	pranali	9876543210	facilities.pune@concept.com	achal	Nikita	Not Connected	-
<input type="checkbox"/>	5	05 Oct 2025 02:53 AM	Bhargavi	9999988888	bhargavi@gmail.com	achal	Nikita	Not Connected	-
<input type="checkbox"/>	6	05 Oct 2025 02:50 AM	Raju	9988755466	raju@gmail.com	D V P Sridhar	shrikant	Not Connected	-
<input type="checkbox"/>	7	30 Sep 2025 07:01 AM	nilesh	9876567890	mghodhe9@gmail.com	achal	Nikita	Demo Interested	call at 4 Pm
<input type="checkbox"/>	8	30 Sep 2025 05:22 AM	Achal	9786789098		achal	shrikant	Registered	-
<input type="checkbox"/>	9	30 Sep 2025 05:14 AM	Purna	9999999988		achal	Nikita	Not Connected	-
<input type="checkbox"/>	10	30 Sep 2025 05:00 AM	Gayatri	9804111799	gayatri@gmail.com	achal	Nikita	Demo Attended	she attended the demo
<input type="checkbox"/>	11	28 Sep 2025 05:40 AM	pranali	1234567890	pi@gmail.com	achal	Nikita	Pending	-

## 2) Lead Manager

### a) Main lead manager dashboard -- contains the stats as in below image

CRM - Manager

Dashboard
Add Lead
View Leads

Gayatri
Logout

Welcome to Lead Manager Dashboard gayatri 🍌

Not Connected  
0

Follow up Planned  
0

Follow up Completed  
0

Demo Attended  
0

Warm Lead  
0

Hot Lead  
0

Converted  
0

Recent Leads

No recent leads.

### b) Add lead section -- opens a form that will able to fill the add lead form as below mentioned image that is for fields

CRM - Manager

Dashboard
Add Lead
View Leads

Gayatri
Logout

+ Add New Lead

Lead Name \*

Enter lead name

Contact \*

Enter contact number

Email

Enter email

Education

Enter education

Experience

Enter experience

Location

Enter location

Lead Owner (Lead Manager) \*

-- Select Lead Manager --

Assign To (BA Specialist)

-- Select Specialist --

Save Lead

### c) View leads section/screen -- contains the list of all leads in table format with Filter by Status as below Each row or data having Action button like View with table header as History and Delete icon with Delete header

CRM - Manager

Dashboard

Add Lead

View Leads

shrikant

Logout

View Leads

Filter by Status --

ID	Created At	Lead Name	Phone	Email	Education	Experience	Location	Status	Feedback	Owner	Assign To	History	Delete
89	2025-10-09 06:19:29	pranali	8888888888		MBA		Pune	Registered	No feedback	achal	Nikita	View	
88	2025-10-09 05:36:38	pranali	8888888800		MBA		Akola	Demo Attended	No feedback	achal	Nikita	View	
87	2025-10-07 06:22:23	pranali	8888888888	p@gmail.com	MBA	2 years as software developer	Akola	Demo Attended	No feedback	achal	Nikita	View	
86	2025-10-07 06:05:05	pranali	9876543210	facilities.pune@coepd.com	MBA		Akola	Not Connected	No feedback	achal	Nikita	View	
85	2025-10-05 02:53:10	Bhargavi	9999999888	bhargavi@gmail.com	B.Com	10	Pune	Not Connected	No feedback	achal	Nikita	View	
84	2025-10-05 02:50:53	Raju	9988775466	raju@gmail.com	B.Tech	2	Hyderabad	Not Connected	No feedback	D V P Sridhar	shrikant	View	
83	2025-09-30 07:01:07	nilesh	9876567890	mghodse91@gmail.com	MBA	2 years in marketing	Pune	Demo Interested	call at 4 Pm	achal	Nikita	View	
82	2025-09-30 05:20:02	Achal	9786789098		BBA	2 years	Pune	Registered	No feedback	achal	shrikant	View	
81	2025-09-30 05:14:03	Purva	9999999988					Not Connected	No feedback	achal	Nikita	View	
80	2025-09-30 05:00:12	Gayatri	9604111799	gayatri@gmail.com	BBA	2 years	Pune	Demo Attended	she attended the demo	achal	Nikita	View	
77	2025-09-28 05:40:26	pranali	1234567890	p@gmail.com		2 years as software developer	Akola	Pending	No feedback	achal	Nikita	View	

3) BA Specialist

- a) Main dashboard -- contains filter leads section and My leads section
- Filter leads having multiple filter options as mentionde in image
  - My leads section contains the list of leads in table format as like mentioned in image

CRM - Manager

Dashboard

Registered Leads

shrikant

Logout

Welcome to BA Specialist Dashboard shrikant 🙌

Filter Leads

Lead Name

Phone

ds-mm-yyyy

All Status

Feedback

Filter

My Leads

Created At	Lead Name	Phone	Email	Education	Experience	Location	Status	Feedback	Owner	Assigned To
2025-10-05 02:50:53	Raju	99887755466	raju@gmail.com	B.Tech	2	Hyderabad	Not Connected		D V P Sridhar	shrikant
2025-09-30 05:22:02	Achal	9786789098		BBA	2 years	Pune	Registered		achal	shrikant

- b) Registered Leads section -- contains the list of Registered List as like in image

CRM - Manager

Dashboard

Registered Leads

shrikant

Logout

Registered Leads

Sr. No	Name	Contact	Email	Education / Experience	City	Lead Owner	BA Specialist	Discount	First Installment	Second Installment	Final Fee
1	Achal	9786789098		BBA / 2 years	Pune	achal	shrikant	No Discount	0.00	0.00	41,300