

# CustomerMaxx CRM Flutter Application Documentation

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## Introduction

This document provides a comprehensive specification for developing the CustomerMaxx CRM application using Flutter. The app is a role-based CRM system designed for managing leads, users, and analytics on mobile devices. It supports three user roles: Admin, Lead Manager, and BA Specialist, each with distinct dashboards, functionalities, and screens.

## 1 Authentication

### 1.1 Login

Login with Email, password, and role selection (Admin, Lead Manager, BA Specialist). Authenticate user and redirect to the role-specific dashboard.

### 1.2 Registration

Register with Name, Email, password, and role selection (Admin, Lead Manager, BA Specialist). Create a new user account and redirect to login or dashboard.

## 2 Role-Based Implementation

The app contains three roles as Admin, Lead Manager, and BA Specialist, each having different functionalities, dashboards, and screens according to their roles.

### 2.1 1. Admin

#### 2.1.1 a) Main Admin Dashboard for Analytics and Reports (Overview)

Displays analytics and reports with charts for quick insights.

- Sidebar Menu: Dashboard, User Management, All Leads, Logout.
- Header: Admin Dashboard Panel.
- Charts: Bar Chart (Total Leads), Line Chart (Weekly Leads Overview), Pie Chart (Lead Status).

### 2.1.2 b) User Management Section

Contains the list of all users in table format with action buttons like edit and delete, and an add button that opens a form to add a new user.

ID	Name	Email	Action	
1	Admin	admin@admin.com	[Edit]	[Delete]
2	lead	lead@lead.com	[Edit]	[Delete]
3	ba	ba@ba.com	[Edit]	[Delete]

### 2.1.3 c) All Leads Screen

List of all leads in table format with advanced options like Search by name or phone or email, filter by status, search by date, filter by feedback. Export button to export leads in CSV format and file chooser with Import CSV button.

ID	Date	Name	Phone	Email	Lead Manager	Status	Action
1	01-01-2023	ameet	1234567890	ameet@gmail.com	active	New	[View]
2	02-01-2023	john doe	0987654321	john@example.com	active	Follow Up	[View]
3	03-01-2023	jane	1122334455	jane@example.com	active	Closed	[View]
4	04-01-2023	alice	6677889900	alice@example.com	active	New	[View]
5	05-01-2023	bob	5544332211	bob@example.com	active	Follow Up	[View]
6	06-01-2023	charlie	9988776655	charlie@example.com	active	New	[View]
7	07-01-2023	david	4433221100	david@example.com	active	Closed	[View]
8	08-01-2023	eve	7766554433	eve@example.com	active	Follow Up	[View]

## 2.2 2. Lead Manager

### 2.2.1 a) Main Lead Manager Dashboard

Contains stats as shown in the image.

- Sidebar: Dashboard, Add Lead, View Leads, Logout.
- Header: Welcome to Lead Manager Dashboard (e.g., gayatri).
- Stats: Total Leads: 10, New Leads: 5, Follow Up: 3, Closed: 2.

### 2.2.2 b) Add Lead Section

Opens a form to fill the add lead form with fields: Name, Phone, Email, Location, Education, Experience, Status, Feedback.

### 2.2.3 c) View Leads Section

Contains the list of all leads in table format with Filter by Status.

ID	Name	Phone	Email	Status	Action
1	John Doe	1234567890	john@example.com	New	[View] [Delete]
2	Jane Smith	0987654321	jane@example.com	Follow Up	[View] [Delete]
3	Alice	1122334455	alice@example.com	Closed	[View] [Delete]
4	Bob	6677889900	bob@example.com	New	[View] [Delete]
5	Charlie	5544332211	charlie@example.com	Follow Up	[View] [Delete]

## 2.3 3. BA Specialist

### 2.3.1 a) Main Dashboard

Contains Filter Leads section and My Leads section.

- Filter Leads: Name, Phone, Email, Education, Experience, Location, Status, Feedback, Order By, Assigned By.
- My Leads: List of leads in table format.

Created At	Lead Name	Phone	Email	Education	Experience	Location	St
2023-09-30	Alex	1234567890	alex@example.com	10+ years	High	Pune	Ac

### 2.3.2 b) Registered Leads Section

Contains the list of Registered Leads.

Sr No	Name	Contact	Email	Education-Experience	City	Lead Owner/BA Sp
1	Actor	1234567890	actor@actor.com	10+2 years	Pune	active