Project Requirement Document (PRD)

Project Name: Talentronaut CRM (Lead & Sales Management System)

Version: 1.1

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Status: Draft / Planning

1. Executive Summary

The goal of this project is to build a centralized Customer Relationship Management (CRM) system tailored for **Talentronaut**. This system will streamline the sales process for Talentronaut's five core service pillars (Web/Software, Mobile Apps, Blockchain/Web3, AI Solutions, and SaaS Development).

The CRM will focus on organizing incoming leads from various sources (Meta Ads, Company Website), segregating them by domain, and enabling sales teams to track communications, schedule meetings, and convert leads into clients.

2. User Roles & Permissions

The application will support Role-Based Access Control (RBAC) with two primary distinct roles:

2.1. Admin (Super User)

- **Access:** Full visibility across the entire application.
- **Capabilities:**
  - View Analytics for *all* domains, campaigns, and sales members.
  - **User Management:** Invite members via email which triggers the Access Token generation.
  - Create/Edit/Delete Domains and Campaigns.
  - Re-assign leads to different sales members manually.
  - Configure integrations (Meta API, Website Webhooks).

2.2. Sales Person (Team Member)

- **Access:** Limited to assigned leads and relevant campaigns.
- **Capabilities:**
  - View personal dashboard (My Leads, My Meetings).
  - Read/Write access to Lead details (add remarks, update status).
  - Cannot delete leads (can only mark as "Junk" or "Lost").

- Cannot see leads assigned to other sales members (unless permission is expanded).

3. Solution Architecture: The Project Hierarchy

To organize data effectively, the system will use a strict 4-level hierarchy structure. This ensures we know exactly where a lead came from.

Hierarchy Flow: `1. Domain -> 2. Campaign -> 3. Ad Set / Source -> 4. Individual Leads`

Level 1: Domain (Service Vertical)

Top-level categorization based on Talentronaut's services.

- *Examples:* "AI Solutions," "Blockchain & Web3," "Mobile App Dev."

Level 2: Campaign

Specific marketing efforts running within a Domain.

- *Examples:* "Q4 AI Outreach," "Black Friday SaaS Deal," "Organic Website Traffic."

Level 3: Ads / Source

The specific origin point of the lead.

- *Examples:* "Meta Video Ad Variant A," "Website Contact Form," "LinkedIn Sponsored Post."

Level 4: Leads

The individual prospect data residing in the folder above.

4. Core Modules & Functionalities

4.1. The Dashboard (Role-Specific)

A. Admin Dashboard

- **Global Stats:** Total Leads, Total Conversion Rate, Revenue Pipeline.
- **Lead Volume Graph:** Visual chart showing leads coming in over time (Daily/Weekly).
- **Source Breakdown:** Pie chart showing % of leads from Meta vs. Website.
- **Team Performance:** List of sales members and their active lead counts/closure rates.

B. Sales Member Dashboard

- **"My Day" View:**
  - Leads assigned today.
  - Meetings scheduled for today.
  - Follow-ups overdue.
- **Notification Center:** Real-time alert list (New Lead Assigned, Upcoming Meeting).

4.2. The Project Page (Lead Management)

This is the heart of the CRM where the hierarchy is visualized.

- **Folder View:** Users navigate through `Domain > Campaign > Ad`.
- **Lead List View:** Once inside an "Ad/Source" folder, a table displays leads:
  - *Columns:* Name, Company, Date Received, Status (New, In Progress, Won, Lost), Assigned To.
- **Smart Segregation Logic:**
  - Leads entering via the "AI Solutions" contact form on the website are automatically routed to the `AI Solutions -> Website Traffic -> Contact Form` folder.

4.3. Lead Detail & Action Center

Clicking a lead opens the **Lead Detail View**. This area allows the Sales Person to "work" the lead.

Features:

1. **Lead Info:** Name, Email, Phone, Company, Source URL.
2. **Status Workflow:** Dropdown to change status (New -> Contacted -> Needs Analysis -> Proposal Sent -> Closed).
3. **Communication Log (Remarks):**
   - Rich text area to add notes.
   - *Fields:* "Last Contacted Date," "Method (Call/Email)."
4. **Meeting Manager:**
   - Schedule a meeting (Date/Time/Link).
   - Mark meeting as "Completed" or "Rescheduled."
   - *Enhancement:* Integration with Google Calendar/Outlook (Future Scope).
5. **Assignee:** Admin can change the "Sales Person" field here.

4.4. Notification System

- **Trigger:** When a new lead is ingested via API/Webhook.
- **Trigger:** When a scheduled meeting time is approaching (15 min prior).
- **Action:**
  - **In-App:** A "Bell" icon lights up with a red dot. Clicking it shows a dropdown summary.
  - **Dashboard:** A "New Leads" banner appears upon login.

4.5. Authentication & Onboarding (Token-Based)

The system will utilize a secure, invite-only Access Token system instead of traditional passwords.

- **Workflow:**
  1. **Admin Action:** Admin enters the email address of a new Sales Member in the dashboard.
  2. **Token Generation:** The system generates a unique, secure Access Token.
  3. **Email Dispatch:** The system automatically sends an email to the user containing the Access Token (or a Magic Link with the token embedded).
  4. **User Login:** The user clicks the link or enters the token on the login page to authenticate.
  5. **Security:** Tokens are validated against the backend. This ensures only authorized personnel invited by the Admin can access the system.

5. Technical Integrations

5.1. Meta Ads (Facebook/Instagram)

- **Mechanism:** usage of Meta Graph API / Webhooks.
- **Data Mapping:** Map Meta "Form Fields" (Name, Email, Phone) to CRM Database columns.
- **Routing:** Tag leads with the specific `Campaign ID` and `Ad ID` to place them in the correct folder hierarchy automatically.

5.2. Company Website

- **Mechanism:** REST API Endpoint (e.g., `POST /api/leads/ingest`).
- **Implementation:** The website's contact forms will send a JSON payload to the CRM when a user submits a request.
- **Payload Example:**


```
{
  "name": "John Doe",
  "service_interest": "Blockchain",
  "source": "Website",
  "email": "john@example.com"
}
```


6. Development Stages (Roadmap)

We will develop this project in 3 Agile phases.

Stage 1: The Foundation (MVP)

- **Goal:** Manual entry working, hierarchy established, and token-based authentication.
- **Tasks:**
  - Database Schema Design (Users, Domains, Campaigns, Leads).

- **Authentication System:** Implement Invite-only flow. Admin generates Access Tokens -> Sent via Email -> User logs in via Token.
- UI Implementation: Admin Dashboard (Skeleton) and Project Page Hierarchy.
- CRUD Operations: Ability to manually add a Domain, Campaign, and Lead.
- Lead Detail View: Ability to add remarks and change status.

Stage 2: Automation & Integration

- **Goal:** Stop manual data entry; Leads flow in automatically.
- **Tasks:**
  - Develop API Endpoints for Lead Ingestion.
  - Connect Website Contact Forms to CRM API.
  - Implement Meta Ads Webhook listener.
  - Develop the "Smart Segregation" logic to route leads to folders.
  - Notification System (In-app bell).

Stage 3: Analytics & Optimization

- **Goal:** Visual insights and refined UX.
- **Tasks:**
  - Build Analytics Charts (Leads per domain, Conversion rates).
  - Meeting Scheduling Module (Calendar view).
  - Export functionality (Download leads as CSV).
  - Advanced Filtering (Filter leads by "Last Contacted > 7 days ago").

7. Suggested Tech Stack

- **Frontend:** Nextjs & tailwind css.
- **Backend:** Node.js with Express.
- **Database:** MongoDB (Ideal for flexible lead data structures) or PostgreSQL (If strict relationships are preferred).
- **Authentication:** Custom Token-based Auth (JWT) or Passwordless Magic Links (e.g., via NextAuth or Firebase).