

case study on

LEAD MANAGEMENT SYSTEM



PROJECT OVERVIEW

The objective of this application is to create a system where an organization can store, view and update all the information regarding their clients, the discussion with the clients regarding their projects, the specifications, details and status of the projects, the complete details of the resources utilized in the projects along with the feedbacks and suggestions from the clients as well as resources.



CLIENT DETAILS

Name: **Confidential**

Location: **India**

Industry: **Sales & Marketing**

TECHNOLOGY DETAILS

- ◆ **Node**
- ◆ **Express**
- ◆ **ReactJS**
- ◆ **MongoDB**
- ◆ **AWS S3**



PROJECT FEATURE VIEW

The application currently offers three primary roles: **Admin, Sales, and Delivery Owner**. It also extends the flexibility to create as many dynamic roles as the user wants along with their level of access, functionalities, and responsibilities.

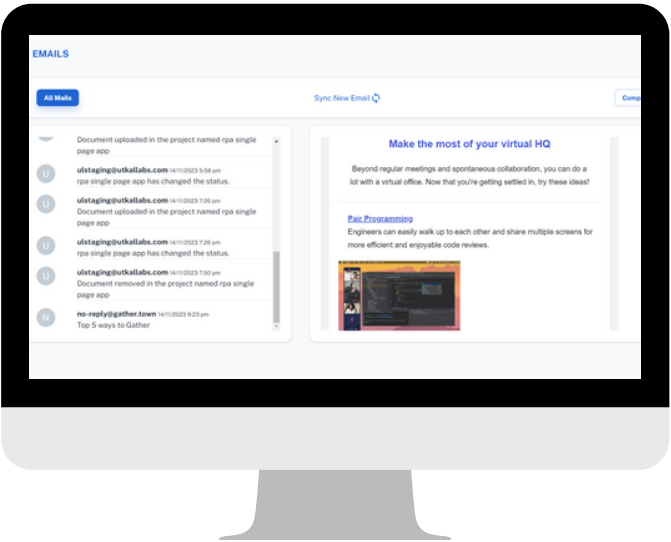
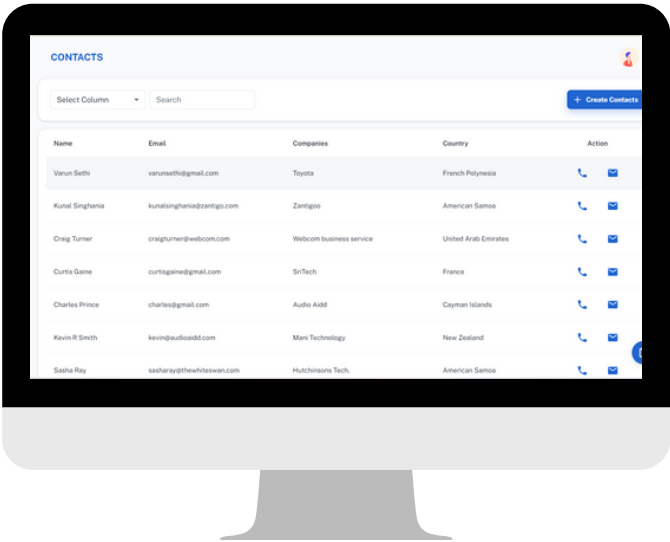
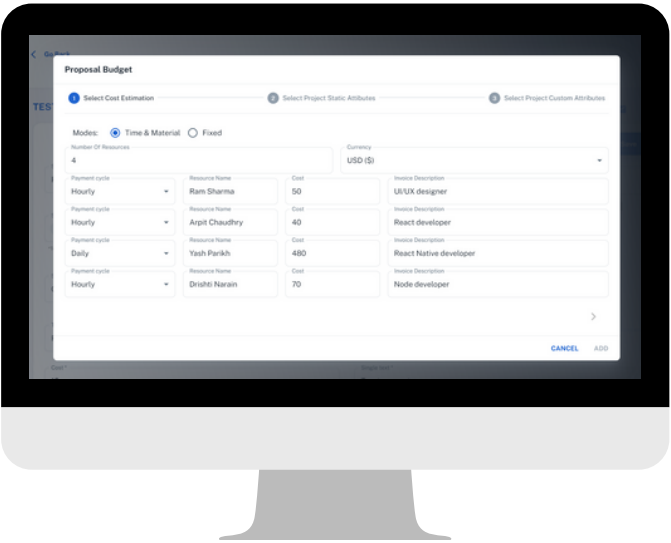
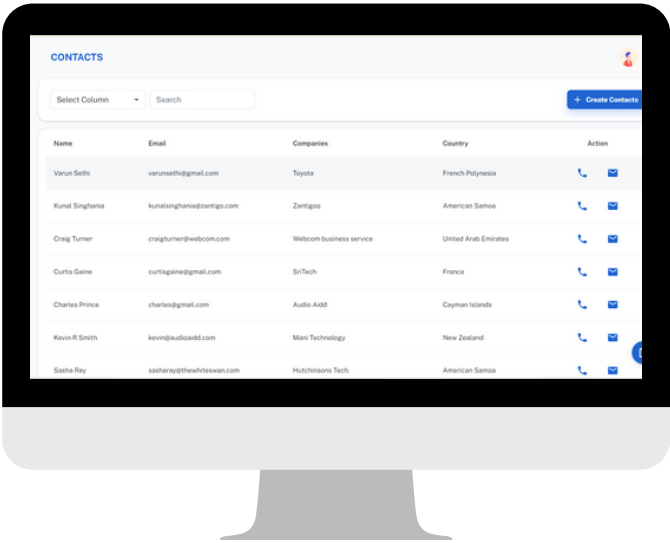
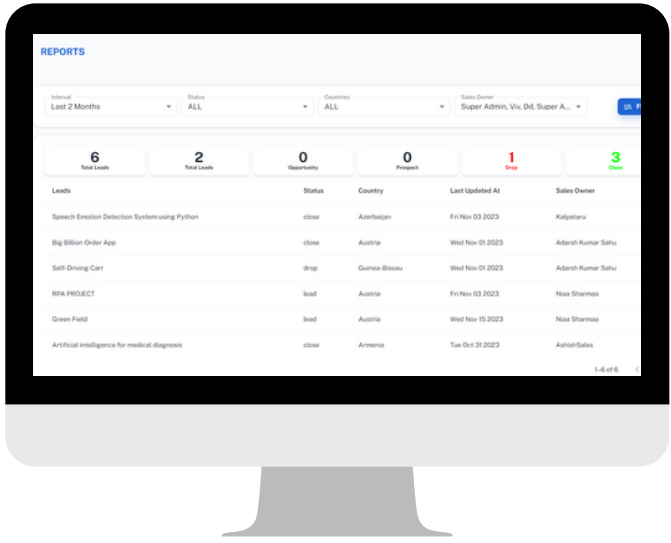
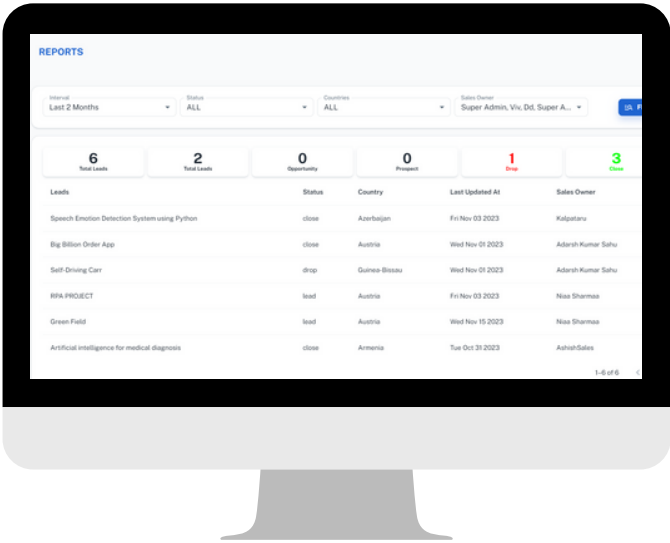
Admin being the superlative user has access to everything in the system. Some of its key functionalities include onboarding users, creating roles, and generating email templates. In addition to these, the admin can create automation rules that will ensure the automatic execution of certain actions when their respective events are triggered.

Sales personnel are provided with responsibilities to create, view, and edit all the details of potential and existing customers, and keep track of all the requirements, ideas, and ongoing projects associated with them. The system equips the Sales users with features such as cost estimations, project creation, invoice generation, email synchronization, and report tracking of leads.

Delivery Owners work with functionalities such as project handling, resource allocation, and task assignment.

The application's Dashboard allows all the users to see the tasks they have been assigned along with their deadlines. Additionally, functionalities such as assignment of tasks & and comments, uploading of documents, and making documents private are also available to users depending on their roles and access levels.

PROJECT SCREENSHOTS





THANK YOU



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