



Smart CRM System Development (Test Task)

Prepared By

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About Orbit

At **Orbit TECH Solution**, we are dedicated to revolutionizing businesses in Ethiopia and beyond with our comprehensive technology and digital marketing services. Our mission is to empower organizations through innovative solutions that drive growth and enhance efficiency.

Test Project: "Smart CRM"

This project invites you to design and build a **Smart CRM system** that is not only functional but elegant and intuitive. By incorporating an **Admin Approval Workflow** and a suite of advanced CRM features, you will demonstrate your ability to deliver a seamless, feature-rich user experience. The system will empower users to manage contacts and leads efficiently while providing administrators with precise control over workflows.

Requirements

1. Frontend (Flutter):

❖ UI/UX:

➤ Core Screens:

■ **Dashboard:**

- Overview of contacts, leads, and pending approvals for admins.
- Basic stats (e.g., total contacts, active leads, pending approvals).
- Use charts to make it more expressive

■ **Contact List:**

- List and manage saved contacts.
- Search and filter functionality.

■ **Lead Tracking:**

- View leads categorized by status (Pending, Approved, Rejected).

■ **Approval Queue (Admins):**

- A dedicated screen for viewing and managing pending approvals.

■ **Contact/Lead Form:**

- Add or edit contact and lead information.

➤ Additional Screens:

■ **Login/Signup:**

- User authentication with email and password.

■ **Profile and Settings:**

- View and update basic user details (name, email).
- Change password.

■ **Notifications:**

- List of alerts (e.g., lead approval/rejection updates).

■ **Offline Mode:**

- Indicate offline status with cached data (read-only mode).

❖ **Features:**

➤ Users:

- Can create, edit, and delete contacts.
- Can create leads (which go into "Pending Approval" status by default).
- Can view the status of their leads.

➤ Admins:

- Can view the "Approval Queue."
- Can approve or reject leads.
- Approved leads move to the "Active Leads" list.
- Rejected leads move to a "Rejected Leads" list with rejection notes.

2. Backend:

❖ Set up a backend using **Node.js** or **Laravel** as you prefer.

❖ **API Endpoints:**

➤ **For Authentication:**

- **POST /auth/signup** – Register a new user.
- **POST /auth/login** – Login user and return a token.
- **GET /auth/profile** – Get user profile details.
- **PUT /auth/profile** – Update user profile details.

➤ **For Contacts:**

- **GET /contacts** – Retrieve all contacts.
- **POST /contacts** – Add a new contact.
- **PUT /contacts/:id** – Update a contact.
- **DELETE /contacts/:id** – Delete a contact.

➤ **For Leads:**

- **GET /leads** – Retrieve all leads (filter by status: Pending, Approved, Rejected).
- **POST /leads** – Add a new lead (default status: Pending Approval).
- **PUT /leads/:id** – Update lead details.
- **DELETE /leads/:id** – Delete a lead.
- **POST /leads/:id/approve** – Approve a lead (change status to "Approved").
- **POST /leads/:id/reject** – Reject a lead (change status to "Rejected," include rejection notes).
- **For Notifications:**
 - **GET /notifications** – Retrieve user-specific notifications.
 - **PUT /notifications/:id/read** – Mark a notification as read.
- **For Admins:**
 - **GET /admin/approval-queue** – Retrieve leads pending approval.

3. Features for Extra Points:

- ❖ **Authentication with Role-Based Access Control:**
 - Use **Firebase Authentication** or a simple system to distinguish between **Admin** and **User** roles.
 - Admins have access to approval and lead management features.
- ❖ **Notifications:**
 - Users receive in-app notifications (or simple alerts) when their lead is approved or rejected.
- ❖ **Analytics Dashboard:**
 - Display stats such as:
 - Total leads by status.
 - Approval rates.
 - Average approval time.

4. Enhanced Mobile App Features:

- **Offline Mode:**
 - Use local storage (e.g., SQLite, Hive) to cache contact and lead data for offline viewing.
 - Show a banner when the app is offline.
- **Push Notifications:**
 - Use Firebase Cloud Messaging (FCM) for real-time notifications (e.g., when a lead is approved or rejected).

- **Search and Filter:**
 - Allow users to search and filter contacts and leads by criteria like name, status, or company.
- **Dark Mode:**
 - Provide a toggle for light/dark theme.

Evaluation Criteria

1. **Functionality:**
 - Admin approval workflow must work as intended.
 - Users and Admin roles should have distinct capabilities.
2. **Code Quality:**
 - Modular, scalable, and well-documented code.
3. **UI/UX:**
 - Professional, user-friendly, and responsive interface.
4. **Performance:**
 - Efficient role-based access control.
 - Optimized database queries and API calls.
5. **Documentation:**
 - A clear [README.md](#) explaining setup, role management, and key features.
6. **Version Control:**
 - Consistent commits with meaningful messages.
7. **Innovation and creativity**

Timeline

You will have **3–5 days** to complete the project. Submit:

- The GitHub repository link.
- The Figma link for the UI UX design.
- A short video demo showcasing the user and admin workflows.

Expected Output

A functional **Contact and Lead Management Module** with an integrated **Admin Approval System** that demonstrates your ability to handle role-based workflows effectively. Good luck!