

CRM Development – Functional Documentation

Company Name: Valmiki Leela Capital

1. User Roles & Access Control

1.1 Admin

- Full access to all modules and data.
- Can view, add, edit, and delete all entries across Business, Leads, Projects, and Teams.

1.2 Head (Manager)

- Access to all data related to their assigned teams and region.
- Can add/edit/delete Business, Leads, and Projects.
- Cannot view data from other regions or teams.

1.3 Team Member

- Can **add Leads** and **add Business/Investor**.
 - Can edit/update only their **assigned** records.
 - Can view:
 - Assigned Leads
 - Assigned Business/Investors
 - Assigned Projects
 - Can use Global Search (limited view for unassigned records).
 - Contact details of unassigned records remain hidden (only name/company name shown).
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2. Admin Login

Secure login using:

- Email or Mobile
- Password

3. Dashboard

3.1 Key Summary Widgets

- Global Search
- Total Investors Leads
- Total Businesses Leads
- Total Projects

3.2 All Project Overview

List view including:

- Company Name
- Contact Person
- Project/Activity Name
- Assigned Team
- Status (Ongoing / Completed)

3.3 Running Project Overview involved or assigned to team

List view including:

- Company Name
- Contact Person
- Project/Activity Name
- Assigned Team
- Status (Ongoing / Completed)

3.4 Assigned Leads to team

List view including:

- Company Name
- Contact Person
- Email
- Mobile
- Lead Status

4. Business leads Module

4.1 Business Leads List

- View, search, and filter all Business/Investor entries.

4.2 Add / Edit / Delete Business

Accessible by: Admin, Head, Team

Fields:

- Person Name
- Company Name
- Email Address
- Mobile Number
- Purpose (Dropdown – Services):
 - Initial Public Offer (IPO) & Rights Issue
 - Private Equity & Pre IPO Fund Raise
 - QIPs & Preferential Allotments
 - Mergers, Acquisitions & Corporate Restructuring
 - Buy-Side, Sell-Side, Takeover & Open Offer Advisory
 - Corporate Advisory & Corporate Valuation
 - Debt Syndication & Structured Debt Solutions
- Size
- Notes
- Next Follow-Up Date
- Assign to Team (checkbox list)

Validations:

- Unique Mobile Number
- Unique Email Address
- Duplicate Prevention

- Validation Message: *“This email/mobile number already exists in the system.”*
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5. investor Leads Module

5.1 Investor Leads List

- Searchable list with filters and color-coded priority.

5.2 Add / Edit / Delete Leads

Accessible by: Admin, Head, Team

Fields:

- Person Name
- Company Name
- Email Address
- Mobile Number
- Size
- Notes
- Lead Quality
 - General Lead
 - Priority Lead (highlighted)
- Assign to Team (checkbox list)
- Next Follow-Up Date
- Purpose Services Dropdown:
 - Initial Public Offer (IPO) & Rights Issue
 - Private Equity & Pre IPO Fund Raise
 - QIPs & Preferential Allotments
 - Mergers, Acquisitions & Corporate Restructuring
 - Buy-Side, Sell-Side, Takeover & Open Offer Advisory
 - Corporate Advisory & Corporate Valuation
 - Debt Syndication & Structured Debt Solutions
- Lead Status:
 - New

- Follow-Up
- Lost
- Open

5.3 Import Leads (Admin/Head Only)

- Import via Excel
- Assign leads to team
- Team sees these in *Newly Assigned Leads*
- After Acceptance → moves to Lead List

5.4 Lead Acceptance Workflow

- Team can Accept or Reject assigned leads.
- Accepted → appears in their main Lead List.
- Rejected → moves to Head's Rejected Leads Tab.

5.5 Priority Leads

- Leads added manually by Head appear in Priority Tab.
 - Highlighted for quick visibility.
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6. Project Module (Admin & Head Only)

6.1 Project List

Includes:

- Company
- Contact Person
- Assigned Team
- Deadline
- Status (Ongoing / Completed)

6.2 Add / Edit / Delete Projects

Fields:

- Project name
- Mobile Number
- Contact Person
- Services:
 - Initial Public Offer (IPO) & Rights Issue
 - Private Equity & Pre IPO Fund Raise
 - QIPs & Preferential Allotments
 - Mergers, Acquisitions & Corporate Restructuring
 - Buy-Side, Sell-Side, Takeover & Open Offer Advisory
 - Corporate Advisory & Corporate Valuation
 - Debt Syndication & Structured Debt Solutions
 - Deadline Date
- Notes
- To-Do / Task creation
- Assign tasks/project to team (checkbox list)

6.3 Task Management

- Add, edit, delete tasks
 - Assign tasks to specific team members
 - Status Tracking: Pending / In Progress / Completed
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7. Role-Based Data Visibility

Admin

- Full visibility across all teams, all regions, and all modules.

Head

- Visibility restricted to their own assigned teams and region.

Team Member

- Can add Leads and Business.
- Can view only assigned Leads, Business, and Projects.

- Global search shows basic info only (no contact details for unassigned records).
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8. Data Validation & System Rules

8.1 Duplicate Validation

- Mobile Number must be unique
- Email Address must be unique
- Duplicate entries are blocked across Leads and Business
- In Mobile or Email if one is unique then Team or Head can Add a Leads or Project

8.2 Mandatory Fields

- Person Name
- Company Name
- Email or Mobile
- Purpose
- Assigned Team
- Lead/Project Status

8.3 Follow-Up Management

- Follow-Up Dates for Leads and Business
 - Overdue Follow-Ups highlighted
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9. Global Search

- Searchable across Leads, Business, and Projects
 - Admin/Head → Full details
 - Team → Limited preview for non-assigned items
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