PRD Sample: Module Requirements (CRM)

Leads & Pipeline Module on an existing web backend

2026

CRM Leads & Pipeline Module

Document type: Product Requirement Document (Sample)
Version: 1.0
Scope: Admin panel module added to an existing web application

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1. Overview

This document describes the requirements for a CRM Leads module to be added to an existing web admin panel. It covers the data model, screen-by-screen CRUD requirements, field-level validation rules, and role-based access controls.

Use this format when you are scoping a single module being added to an existing system, not a new product from scratch.

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2. Context

The platform already has: - A working admin panel with login, navigation, and a User model - A Country model with a pre-populated list of countries - Role-based access control (user groups)

The new CRM module adds two sections to the admin navigation: **Leads** and **Sales** (leads that have been converted to a sale).

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3. Data Models

3.1 Lead

Field	Type	Required	Notes
`id`	integer	N/A	Auto-increment primary key
`company_name`	string	Yes	
`country_id`	integer	No	Foreign key to existing Country model
`region`	string	No	Free text
`status`	enum	Yes	`new`, `follow_up`, `sale`, `do_not_call`, `call_next_year` (defaults to `new`)
`category`	string	No	Free text label
`website_url`	string	No	URL format
`notes`	text	No	Internal notes

Field	Type	Required	Notes
`assignee_id`	integer	Yes	Foreign key to User; auto-set to creator on creation
`created_at`	timestamp	N/A	
`updated_at`	timestamp	N/A	

Status and notes are **revisionable**: every change is logged with the user who made it and the timestamp.

3.2 Contact

A Lead may have one or more Contacts (people at the company).

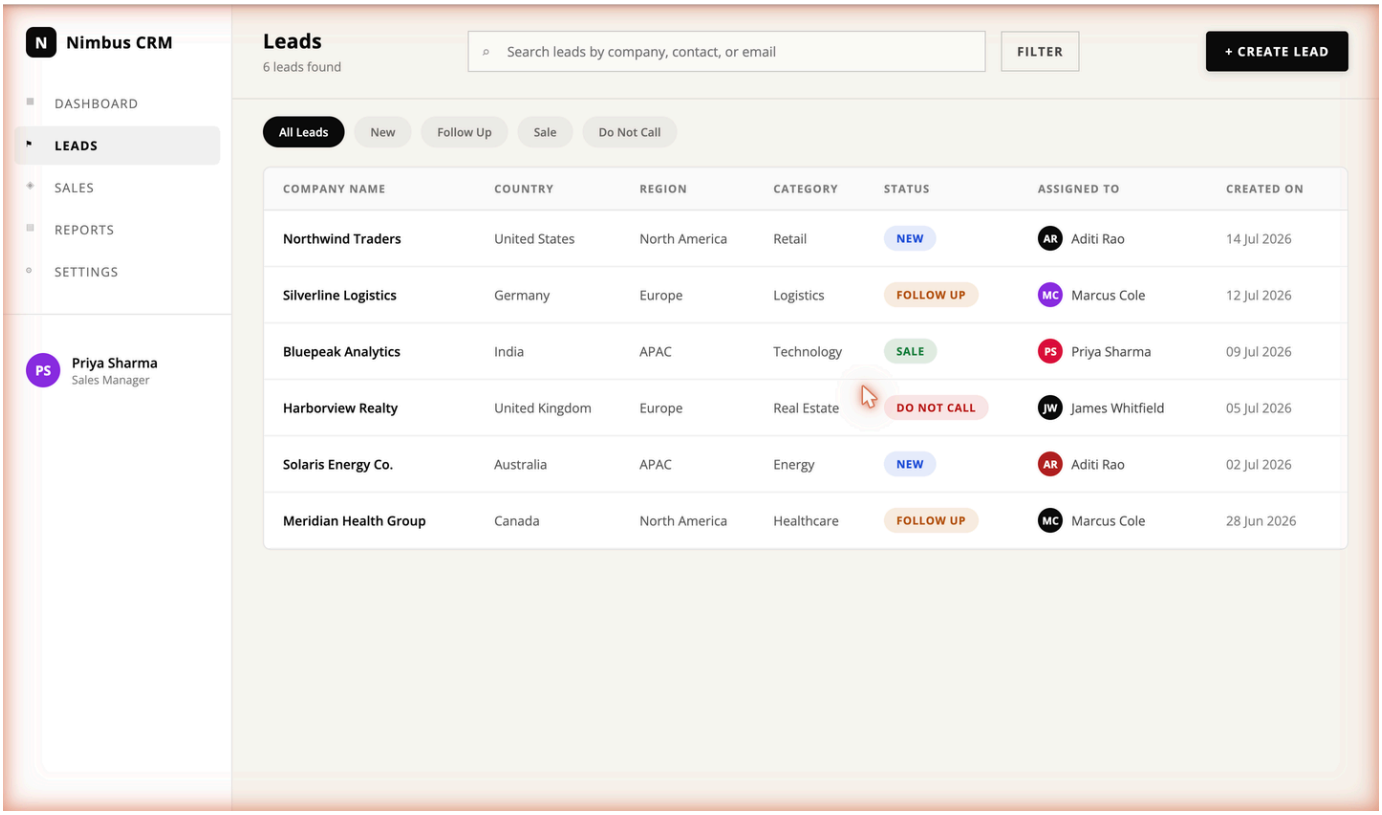
Field	Type	Required	Notes
`id`	integer	N/A	
`lead_id`	integer	N/A	Foreign key to Lead
`name`	string	Yes	
`email`	string	No	Email format validation
`phone`	string	No	
`designation`	string	No	e.g. “Head of Procurement”
`created_at`	timestamp	N/A	

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4. Screen Requirements

Screen 1: Lead Listing

Path: `/admin/crm/leads`



Acceptance criteria:

1. The listing table shows all leads with columns: Company Name, Country, Region, Category, Status, Assigned To, Created On.
2. The table is sortable by Company Name (A–Z, Z–A) and Created On (newest first by default).
3. A search field at the top filters the list in real time by Company Name.
4. Each row links to the Lead Detail / Edit screen.
5. A "Create Lead" button in the top-right corner navigates to the Create Lead screen.

Role access:

- Owners group sees all leads.
- Non-owners see only leads assigned to them.

Screen 2: Create Lead

Path: `/admin/crm/leads/create`

Form fields:

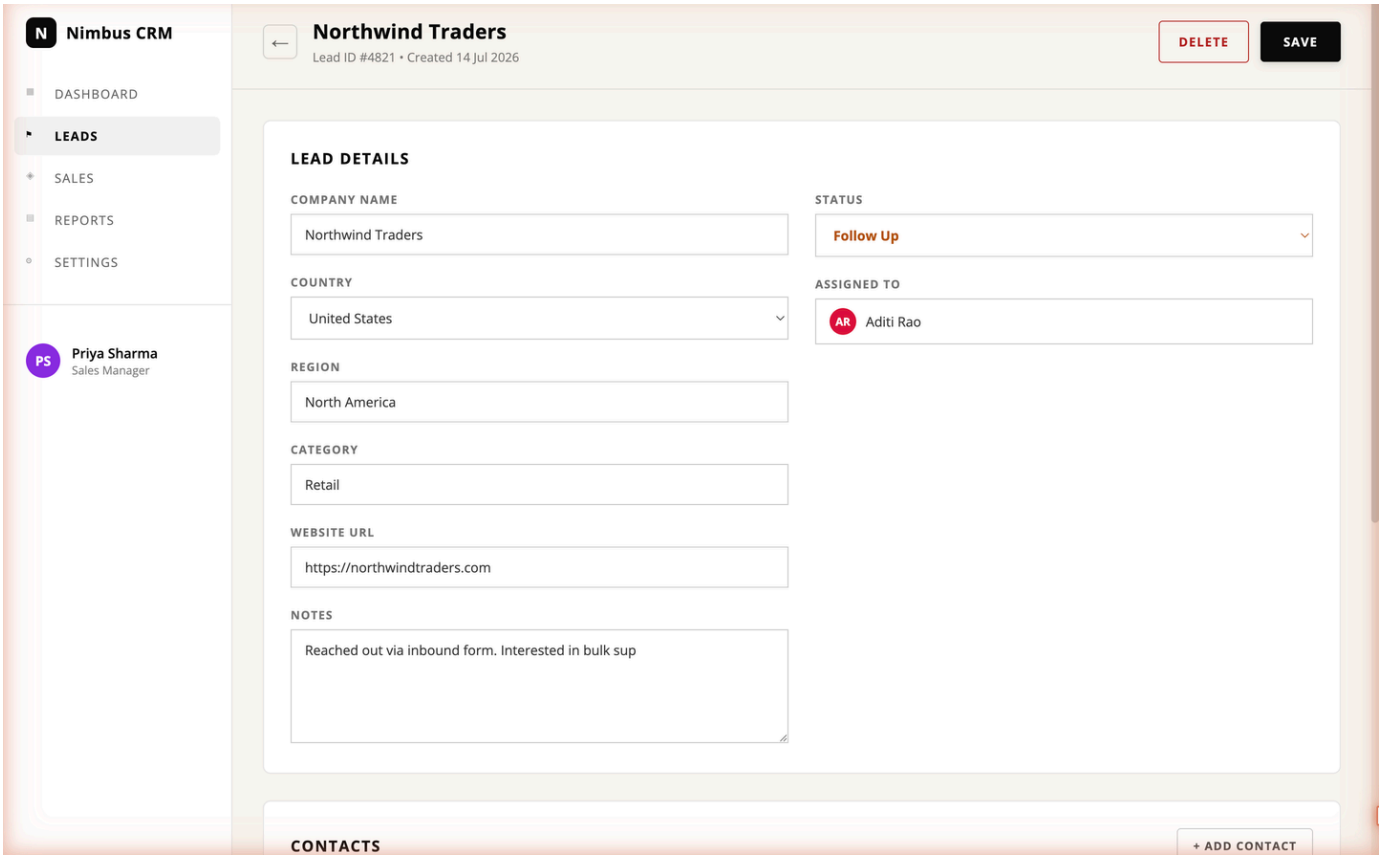
Field	Input type	Validation
Company Name	Text	Required
Country	Dropdown (existing Country model)	Optional
Region	Text	Optional
Category	Text	Optional
Website URL	Text	Optional; must be a valid URL if entered
Notes	Textarea	Optional

Acceptance criteria:

1. On submission, a Lead record is created with `status = new` and `assignee_id` set to the logged-in user.
2. After creation, the user is redirected to the Lead Detail screen.
3. The user can add one or more Contacts from within the create form by clicking "Add Contact". Each Contact form shows: Name (required), Email, Phone, Designation.
4. At least zero Contacts is valid; contacts are not required at creation time.

Screen 3: Lead Detail / Edit

Path: `/admin/crm/leads/{id}`



This screen has two variants depending on role:

Variant A — Assigned user or Owner:

1. All Lead fields are editable inline: Company Name, Country, Region, Category, Website URL, Notes, Status.
2. Assignee can be changed by an Owner only.
3. Contacts can be added, edited, or removed.
4. A "Change History" panel (Owners only) shows a chronological log of all Status and Notes changes, with the user and timestamp.
5. A "Delete" button (Owners only) deletes the lead after a confirmation dialog.

Variant B — Non-owner viewing another user's lead:

1. Read-only view: Company Name, Country, Region, Category, Website URL.
2. Status, Notes, Contacts, and Change History are hidden.
3. No edit controls shown.

Screen 4: Sales Listing

Path: `/admin/crm/sales`

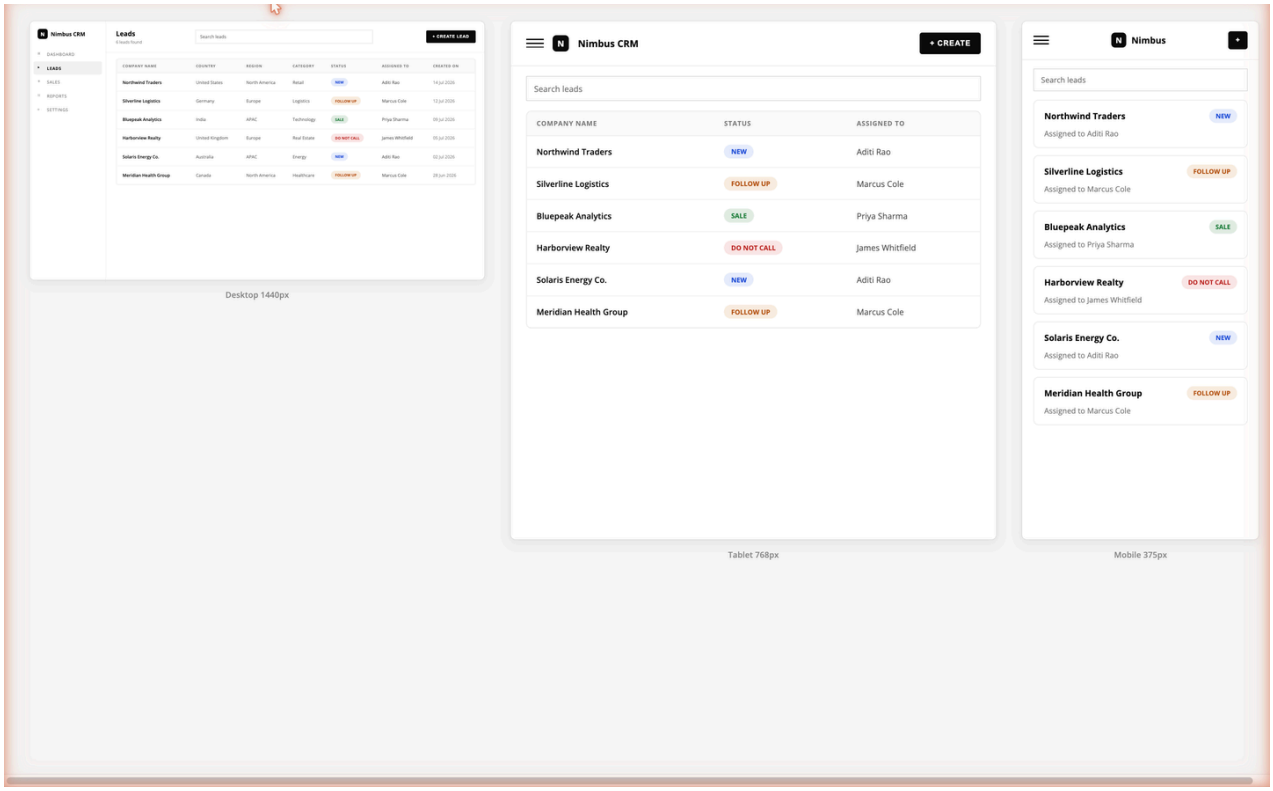
Identical in layout to the Lead Listing, filtered to show only leads with `status = sale`.

Acceptance criteria:

1. Owners see all sales leads. Non-owners see only sales leads assigned to them.
2. Same search and sort controls as the Lead Listing.
3. Clicking a row navigates to the same Lead Detail / Edit screen.
4. There is no "Create" button on this screen. Sales leads are created by setting a lead's status to "Sale" on the Lead Detail screen.

Responsive Design

The module is usable on tablet and mobile, where agents may need to update a lead status from the field.



Desktop ($\geq 1024px$) : $full table with all columns visible. Tablet (768 -- 1023px) : Region and Category columns hidden; re$ card-based layout replacing the table; each card shows Company Name, Status badge, and Assigned To.

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5. Field Validation Rules

Field	Rule
Company Name	Required; max 255 characters
Website URL	Must start with `http://` or `https://`; max 512 characters
Contact Email	Standard email format; max 255 characters
Contact Phone	No format restriction; max 30 characters
Status	Must be one of the five defined enum values

Validation errors are shown inline beneath the relevant field. The form is not submitted until all errors are resolved.

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6. Role-Based Access Summary

Action	Non-owner	Owner
View own leads	Yes	Yes
View all leads	No	Yes
Create lead	Yes	Yes
Edit assigned lead	Yes	Yes

Action	Non-owner	Owner
Edit any lead	No	Yes
Re-assign lead	No	Yes
View change history	No	Yes
Delete lead	No	Yes

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7. Scope Boundaries

In scope: - Lead listing, create, edit, and delete - Contact management within a lead - Sales view (filtered listing of converted leads) - Role-based access (owner vs. non-owner) - Change history for Status and Notes fields

Out of scope for v1: - Email integration (logging emails sent to contacts) - Pipeline / Kanban board view - Lead import via CSV - Activity timeline (calls, meetings) - Automated reminders or follow-up scheduling

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This is a sample document illustrating the level of detail expected in a PRD for an admin panel module. Adjust the data model and screens to match your actual business objects.