Purpose:
A web application to manage leads, clients, agreements, memberships, billing, expenses, and reminders for Trial Bench (co-working space, Trivandrum). The system should help the Community Manager capture enquiries, track client lifecycle, generate agreements, send communications, and give Admin visibility into income, expenses, and profit.

1. Lead & Client Management

- **Add New Lead** (when someone visits or calls):
  - **Mandatory Fields:**
    - Name *(required)*
    - Phone *(required, with country code; default +91, editable if needed)*
  - **Phone & WhatsApp Rules:**
    - Phone stored with country code.
    - WhatsApp can auto-copy from Phone, but editable with country code.
  - **Capture Fields:**
    - Name (mandatory)
    - Phone (mandatory)
    - WhatsApp (optional, defaults to phone)
    - Email
    - **Source (dropdown):** Walk-in / Phone / Referral / Event / Website / Social Media / Other
      - If Referral → enter *Referral Person Name*
      - If Social Media → enter *Which Platform* (Instagram, LinkedIn, etc.)
    - **Purpose of Visit (dropdown):** Dedicated Desk / Flexible Desk / Cabin / Virtual Office / Meeting Room / Others
    - Notes
- **Timeline / Activity Log:**
  - Tracks visits, calls, emails, follow-ups, payments.
  - Staff can add notes and mark follow-ups done.
- **Lead Status Flow:**
  - **New → Contacted → Follow-up → Converted / Not Interested**
- **Follow-up Flow:**
  - Community Manager can set follow-up reminders (e.g., *call after 2 days*).
  - Dashboard shows due reminders.
  - After follow-up, status updated (another follow-up / converted / not interested).
- **Conversion to Client:**
  - Capture Email (for agreement & welcome email).
  - Capture WhatsApp (for community group).
  - Capture Birthday (day/month, for greetings).
  - Select Package.
  - **Manual Welcome Email button** → system sends only when staff clicks.

2. Co-Working Agreements

- **Agreement Creation:**
  - Fields: client/company name, signatory, desk type-number, start/end dates, package, price, terms.
  - **Agreement Number:** auto-generated sequentially (e.g., TB-0001, TB-0002).
- **Agreement Document:**
  - Auto-generate PDF from template.
  - Staff can view, download, and email to client.
- **Agreement Status:**
  - Active / Expired / Cancelled (auto-expire after end date).
- **Renewal Reminders:**
  - Notifications at **30 days, 15 days, expired**.
  - Alerts to Community Manager (and optionally clients).
- **Manager/Admin View:**
  - List, filter, and export agreements.
  - Reports: active agreements, expiring soon, new agreements signed.

3. Memberships & Billing

- **Access Control:**
  - Only **Accounts Team** and **Admin** can view/manage billing.
  - Community Manager cannot view invoices or payments.
- **Features (Accounts/Admin only):**
  - Membership plans: Daily, Monthly, Quarterly, Half-yearly, Yearly, Virtual Office.
  - Generate invoices.
  - Record payments (amount, mode, date).
  - Store invoices under client profile.
  - Send receipts via Email/WhatsApp.
- **Member Last Date:**
  - Field to enter last date of membership (if member leaves early).
  - If entered:
    - System stops generating new invoices.
    - Member status = Past.
  - Already generated invoices remain in records.

4. Expenses Management

- **Access Control:**
  - Only **Accounts Team** and **Admin** can record and view expenses.
- **Features:**
  - Record expenses with:
    - Category (dropdown).

        - Amount.
        - Date.
        - Notes / Bill Number (optional).
    - Admin can add/edit Expense Categories.
- **Predefined Categories (editable):**
    - Rent
    - Electricity & Utilities
    - Internet
    - Salaries
    - Pantry
    - Maintenance
    - Marketing
    - Other Expenses

5. Communication & Reminders

- **Email:** Agreements, invoices, **Welcome Email (manual send only)**.
- **WhatsApp:** Add clients to group, send reminders, confirmations.
- **Birthday greetings:**
    - Dashboard shows birthdays (month-wise, active + past members).
    - Greeting is sent **only when staff clicks "Send Greeting."**
- **Follow-up reminders:**
    - Community Manager sets, dashboard shows due reminders.

6. Dashboard & Reports

- **Community Manager Dashboard:**
    - Today's leads.
    - Follow-ups due.
    - **Birthday List (Active + Past Members):** with "Send Greeting" button.
    - Agreements expiring soon.
- **Manager Dashboard:**
    - Leads added this week/month.
    - Conversions this week/month.
    - Breakdown of enquiries by Source & Purpose.
    - Agreements expiring soon.
    - Occupancy overview.
    - **Birthday List (Active + Past Members).**
- **Admin Accounts Dashboard:**
    - Accounts receivable (outstanding invoices).
    - Payments received (daily/weekly/monthly).
    - Pending dues / overdue invoices.
    - **Total income (month-wise, year-wise, package-wise).**
    - **Expenses (by category, month-wise, year-wise).**
    - **Profit = Income – Expenses (month, year, YTD).**

- Graphical view (income vs expenses vs profit).
- Export to CSV/PDF.
- **Birthday List (Active + Past Members).**

7. User Roles & Permissions

- **Community Manager:**
  - Add leads, manage follow-ups, convert clients.
  - Create agreements.
  - Send welcome emails & birthday greetings (manual).
  - View birthdays (active + past members).
  - View agreements expiring soon.
  - Cannot access billing or expenses.
- **Accounts Team:**
  - Full access to billing & expenses.
  - Generate invoices, record payments, record expenses, send receipts.
  - Cannot edit leads or agreements.
- **Admin:**
  - Full access to all modules.
  - Can manage Expense Categories.
  - Special Accounts Dashboard (income, expenses, profit).

8. Settings

- Manage staff users, roles, and permissions.
- Manage packages/plans.
- Manage agreement template.
- **Manage Expense Categories** (add/edit/remove).
- Data privacy: consent checkbox for marketing, delete/export client data.

9. Notifications

- In-app: new lead, follow-up due, agreements expiring.
- WhatsApp/Email: renewal alerts (30/15/1 days).
- Welcome email & birthday greetings: **manual only (button click).**

11. Deliverables Expected from Developer

1. Lead module (mandatory fields, source/purpose logic, phone/WhatsApp rules, status flow, follow-ups).
2. Client conversion + agreement module (auto-generated agreement number, renewal reminders, last date).

3. Memberships & billing module (**restricted to Accounts + Admin**).
4. Expenses module (restricted to Accounts + Admin, with categories).
5. Communication module (manual welcome email + manual birthday greetings).
6. Dashboards & reports (Community Manager, Manager, Admin).
7. Settings & roles (including expense category management).
8. Notifications & reminders.
9. Data privacy features.

✅ This version is clean, structured, and covers everything:

- Roles (Community Manager, Accounts, Admin).
- Lead-to-client flow.
- Agreements with auto-numbering + renewal reminders.
- Membership billing & member last date.
- Expenses & profit tracking.
- Dashboards for each role.
- Manual emails/greetings.

***add team members - name, birthday, whatspp number and contact number under primary member**