CRM for Employee Productivity Platform — Structure Plan (For Understanding & Ideas)

This plan explains the **structure in simple terms**, helping stakeholders and developers visualize how the CRM will be organized and how everything connects.

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1. Big Picture

Think of the CRM as **3 main parts**: 1. **Frontend (What users see)** — dashboards, forms, charts. 2. **Backend (Brains of the system)** — APIs, business logic, data processing. 3. **Database (Memory)** — stores accounts, contacts, tasks, time logs.

It integrates tightly with the **Employee Productivity Monitoring Software** so managers can see not only *customer projects* but also *employee work logged against those projects*.

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2. Key Building Blocks

A. Users & Roles

- **Admin** → manages system settings, roles.
- **Manager** → oversees team, projects, reports.
- **Sales/Support Staff** → manage contacts, tasks, deals.

B. Accounts & Contacts

- **Accounts** → Companies/clients.
- **Contacts** → People within those companies.

C. Deals & Projects

- Track opportunities or ongoing client projects.
- Moves through stages (Prospecting → Negotiation → Won/Lost).
- Linked with tasks and time entries.

D. Tasks & Tickets

- Work items assigned to employees.
- Linked to deals/projects.
- Status (To-do, In Progress, Done).

E. Time Entries

- Pulled from Productivity Monitoring system.
- Show exactly how much time employees worked for each deal/project.
- Useful for billing and productivity reports.

F. Reports & Analytics

- Pipeline overview (sales value in each stage).
- Hours spent per client/project.
- Productivity vs revenue.
- Export options (CSV, PDF).

G. Integrations

- Productivity Monitoring (core integration).
- Optional: Payroll, Billing, Email, Project tools.

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3. Data Flow (Simple View)

1. **Employee works on task** → Productivity Agent records activity.
2. **Agent sends log** → Productivity backend processes and pushes time entry to CRM.
3. **CRM stores entry** → Links to deal/project.
4. **Manager views CRM** → Sees total hours per client, tasks in progress, deal stage.
5. **Reports generated** → Used for billing, team performance, and sales tracking.

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4. System Layers (Simplified)

- **Frontend (React)** → Dashboards, lists, reports.
- **Backend (API)** → Auth, business rules, syncing logic.
- **Database (PostgreSQL)** → Stores structured CRM data.
- **Cache/Queue (Redis)** → For fast lookups and background jobs.
- **Storage (S3/Azure Blob)** → Attachments, reports.

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5. Example User Journey

- **Sales Manager:** Logs in → opens dashboard → sees pipeline and team activity.
- **Employee:** Views assigned tasks (synced from CRM) → works → time logged automatically.
- **Admin:** Configures roles, sets policies, manages integrations.

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6. Roadmap (Ideas for Phases)

- **MVP (Start Small):** Accounts, Contacts, Deals, Tasks, Basic Reports.
- **Phase 2:** Advanced Reports, Integrations, Webhooks.
- **Phase 3:** AI Insights (churn prediction, productivity forecasting).

✅Takeaway

This CRM is not just a contact manager; it's a **bridge between customer-facing projects and employee productivity data**. It ensures every hour tracked is linked to a client/project, making reporting, billing, and management far easier.