

Contact Module - iGen Financials

1. Functional Overview / Use Case

The Contact Module maintains master data for all persons and organizations interacting with the system, including:

- Landlords
- Tenants
- Vendors
- Brokers
- Buyers / Sellers
- Key Holders
- Project Stakeholders

Contacts are referenced across modules like Property Master, Project Master, Contracts, and Transactions. This ensures standardized linking and eliminates duplication.

2. UI Elements & Interactions

- Add Contact Page

Form-based entry interface with the following fields:

- Full Name (Text)
- Type (Dropdown - Individual / Company)
- Stakeholder Type(s) (Multi-select dropdown - Landlord, Tenant, Vendor, Buyer, Seller, Broker, Key Holder, Other)
- Phone Number (Text)
- Alternate Phone (Text)
- Email (Text)
- Address (Multiline Text)
- PAN (Text)

- GST (Text - optional, only if Company)
- Notes (Multiline Text)
- Linked Properties / Projects (Search and tag multiple)
- Save Button (Bottom of form)

- Manage Contacts Page

Tabular view with columns: Name, Type, Stakeholder Types, Phone, Email, Actions (Edit)

Search & filter panel: by Stakeholder Type, Type, Name, Phone

3. Validation Logic

- PAN must be unique (optional if not provided).
- Email must be in valid format.
- Phone Number must be 10 digits.
- At least one Stakeholder Type is mandatory.
- GST mandatory only if Type = Company.

4. Database Schema

Column Name	Data Type	Constraints / Notes

contact_id	UUID (PK)	Primary Key
company_id	UUID	FK to companies
full_name	Text	Required
type	Text	'Individual' or 'Company'
stakeholder_types	Text[]	Array of stakeholder types
phone	Text	Required, 10 digits
alternate_phone	Text	Optional
email	Text	Optional, validated format
address	Text	Optional
pan	Text	Optional, must be unique if provided
gst	Text	Optional, required if type = Company

notes | Text | Optional

created_at | Timestamp | Auto-generated

updated_at | Timestamp | Auto-updated on edit

5. UI Mockup

Screens below show the Add Contact and Manage Contacts UI:

Add Contact

Full Name

Type

Individual

▼

Other

Stakeholder Type(s)

☐ Landlord

☐ Tenan

☒ Vendor

☐ Other

Phone Number

Email

Address

GST

Linked Properties / Projects

Search and tag multipler)

Save

Manage Contacts

Search

Stakeholder Type

▼

Type

Name

▼

Email

Name	Type	Phone	Email
John Doe	Individual Landlord, Tenant	(123) 456-7880	john@exar.
Jane Smith	Vendor	(987) 634-3210	jane@exar.
Acme Corporation	Buyer, Seller	(555) 123-4567	into@acme.
Michael Brown	Broker Key Holder	(555) 987-6543	michael@exami.com