PHASE 1 FOUNDATION - IMPLEMENTATION SUMMARY

What's Been Completed

1. Database Schema Expansion

Complete - All Phase 1 database models added

New Models:

- Employee (role profiles with capabilities)
- ProjectTask (task management)
- ProjectFile (bi-directional file storage)
- TimeLog (employee time tracking)
- Sequence (marketing automation)
- Message (internal messaging)
- AIRecommendation (AI approval workflow)

Extended Models:

- User (added role field and new relations)
- Project (assigned employee, priority, progress tracking)

2. Role-Based Access Control System

Complete - Full permission system operational

Components:
- lib/roles.ts (23 granular permissions)
- lib/auth-helpers.ts (auth middleware)
- 6 employee roles with default capabilities
- Visual capabilities matrix in admin panel

3. Admin Panel - Employee Management

Complete - Full CRUD interface

Pages:
- /admin (dashboard with navigation)
- /admin/employees (employee list)
- /admin/employees/new (create with capability matrix)
- /admin/employees/[id] (edit employee)

Current Progress: 3/8 Complete (37.5%)

Next Steps

Recommended Build Order:

1. Lead CRM (with sequences)

2. Project Boards (main revenue)

3. File Storage (S3 integration)

4. Messaging Center

5. AI Workflow

All existing users default to "client" role. Admin account needs manual SQL update.

Last Updated: October 13, 2025