**CRM Database Schema Documentation**

This document explains the **CRM database design**, including tables, relationships, and how Lead Status and Pipeline Stages work together.

**1. Lead Table**

Holds basic information about potential clients.

**Fields:**

* id → Unique identifier
* name, email, phone → Contact details
* source → Where the lead came from (LinkedIn, Web Form, etc.)
* status → Current state of the lead (see below)
* score → Lead scoring metric
* team\_id → Assigned team
* user\_id → Assigned user (sales rep)

**Lead Status Values:**

* **Open** → Lead created but not yet worked on
* **Unassigned** → Lead is in the system but not owned by any sales rep
* **In Progress** → Being actively pursued
* **Converted** → Successfully turned into a customer
* **Lost** → Disqualified or unresponsive

**2. Customer Table**

Holds details of converted leads.

**Fields:**

* id, name, email, phone, company, industry
* lead\_id → References the original lead that became a customer

**3. User Table**

Represents CRM users (sales reps, admins, etc.).

**Fields:**

* id, name, email, role
* team\_id → The team they belong to

**4. Team Table**

Groups multiple users.

**Fields:**

* id, name, description

**5. Interaction Table**

Tracks activities (emails, calls, messages).

**Fields:**

* id, type (Email, Call), content, timestamp
* is\_automated → Whether system-generated
* lead\_id / customer\_id → Who this interaction is linked to

**6. Campaign Table**

Marketing campaigns running in CRM.

**Fields:**

* id, name, description, channel (Email, WhatsApp, etc.)
* start\_date, end\_date

**7. Opportunity Table**

Represents potential deals (usually after a lead is qualified).

**Fields:**

* id, name, value, close\_date
* lead\_id → Lead tied to this opportunity
* pipeline\_stage\_id → Current stage in the pipeline

**8. PipelineStage Table**

Defines the sales pipeline journey.

**Pipeline Stage Values (in sequence):**

1. **New** → Lead created, no contact
2. **Contacted** → First outreach done
3. **Qualified** → Lead meets requirements
4. **Opportunity** → Active deal in progress
5. **Deal/Won** → Successfully closed
6. **Lost** → Dropped or disqualified

**9. Task Table**

Tracks work assigned to users.

**Fields:**

* id, title, description, due\_date
* status (Pending, Completed)
* priority
* user\_id → Assigned user
* opportunity\_id → Linked opportunity (if any)

**10. LeadCampaign Table (Junction)**

Many-to-many mapping between leads and campaigns.

**Fields:**

* lead\_id
* campaign\_id

**11. Conversation Table**

Represents communication threads.

**Fields:**

* id, channel (WhatsApp, LinkedIn, Email), subject
* lead\_id / customer\_id
* created\_at

**12. Message Table**

Individual messages inside a conversation.

**Fields:**

* id, conversation\_id
* sender (Lead, User, or external email)
* content, timestamp
* direction (Inbound, Outbound)
* is\_read

**🔄 Relationship Between Status & Pipeline Stage**

* PipelineStage = **Where the lead is in the sales journey**
* Lead.status = **Overall outcome/state of the lead**

**Mapping Rules:**

* New, Contacted, Qualified, Opportunity → Status = **In Progress**
* Deal/Won → Status = **Converted**
* Lost → Status = **Lost**

Example:

| **Lead Name** | **Status** | **Pipeline Stage** |
| --- | --- | --- |
| John Doe | Open | New |
| Jane Smith | In Progress | Contacted |
| Raj Patel | In Progress | Opportunity |
| Maria Khan | Converted | Deal/Won |
| Alex Roy | Lost | Lost |