CRM Database Schema Documentation (Updated)

This document explains the updated CRM database design, including tables, relationships, and enhancements for managing leads, customers, deals, products, conversations, and analytics.

# 1. Lead Table

Stores information about potential clients (leads) before they are converted into customers.

Fields:  
• id → Unique identifier  
• name, email, phone → Contact details  
• source → Acquisition channel (LinkedIn, Web Form, etc.)  
• status → Overall state of the lead (Open, Unassigned, In Progress, Converted, Lost)  
• score → Lead scoring metric  
• city, region → Location details (used for Geo Insights)  
• team\_id → Assigned team  
• user\_id → Assigned sales rep  
• created\_at, updated\_at → Audit fields

# 2. Customer Table

Holds details of leads that are successfully converted into customers.

Fields:  
• id, name, email, phone, company, industry  
• city, region → Location info  
• lead\_id → Reference to the originating Lead  
• created\_at, updated\_at

# 3. User Table

Represents CRM users (Sales reps, Admins, Managers).

Fields: id, name, email, role, team\_id

# 4. Team Table

Groups multiple users into teams.

Fields: id, name, description

# 5. Interaction Table

Tracks communications and activities like emails, calls, and automated system messages.

Fields: id, type, content, timestamp, is\_automated, lead\_id, customer\_id

# 6. Campaign Table

Stores details of marketing campaigns (Email, WhatsApp, LinkedIn, etc.).

Fields: id, name, description, channel, start\_date, end\_date

# 7. Opportunity Table (Deals)

Represents deals linked to qualified leads and customers.

Fields:  
• id, name → Deal information  
• value → Monetary deal value  
• currency → Currency code (default: INR)  
• probability → Chance of deal success (0–100)  
• expected\_revenue → Auto-calculated as value × probability  
• status → Deal stage outcome (Open, Won, Lost)  
• close\_date → Expected or actual close date  
• created\_at  
• lead\_id → Source Lead  
• customer\_id → Associated Customer  
• pipeline\_stage\_id → Current pipeline stage

# 8. Product Table

Represents catalog of products/services.

Fields: id, name, description, base\_price, currency

# 9. DealProduct Table

Junction table mapping deals to products with quantities and prices.

Fields: id, opportunity\_id, product\_id, quantity, unit\_price, total\_price

# 10. PipelineStage Table

Defines the sequential stages of the sales process.

Values:  
1. New → Lead created  
2. Contacted → First outreach  
3. Qualified → Lead meets requirements  
4. Opportunity → Deal in progress  
5. Deal/Won → Successfully closed  
6. Lost → Lead dropped

# 11. Task Table

Tracks work assignments related to opportunities and leads.

Fields: id, title, description, due\_date, status, priority, user\_id, opportunity\_id

# 12. LeadCampaign Table

Many-to-many relationship between leads and campaigns.

# 13. Conversation Table

Represents communication threads across multiple channels.

Fields: id, channel, subject, created\_at, lead\_id, customer\_id

# 14. Message Table

Stores individual messages inside a conversation.

Fields: id, conversation\_id, sender, content, timestamp, direction, is\_read

# 15. FileAttachment Table

Supports file uploads (docs, images, voice notes) for leads, customers, opportunities, and messages.

Fields: id, related\_type, related\_id, file\_url, file\_type, uploaded\_by, uploaded\_at

# 🔄 Relationships Summary

• Lead → Opportunity → Customer → Shows lifecycle from prospect to paying client.  
• Lead ↔ Campaign via LeadCampaign → Tracks marketing sources.  
• Opportunity ↔ Product via DealProduct → Allows multiple products per deal.  
• Conversation ↔ Message → Enables unified inbox.  
• FileAttachment → Linked to multiple entities.

# 📌 Example Walkthrough

1. A Lead named 'John Doe' is created from LinkedIn with status = Open.  
2. Sales rep contacts him → PipelineStage = Contacted, Lead.status = In Progress.  
3. Lead is Qualified → An Opportunity 'CRM Software Deal' is created with value = 50,000 INR, probability = 60.  
4. Opportunity links to 2 Products (CRM Subscription, Training Service).  
5. Expected Revenue = 30,000 INR.  
6. Deal moves to 'Deal/Won', Lead status becomes Converted → John becomes a Customer.  
7. A Conversation thread starts (Email), messages are stored, and attachments (proposal doc) are linked.