# Title: [WIP] Landing page customisation architecture

## DB Design

### landing\_page\_layouts

| Column name | Type | Other | notes |
| --- | --- | --- | --- |
| - | timestamps |  |  |
| id | BIGINT UNSIGNED | PK auto generated |  |
| account\_id | BIGINT UNSIGNED | NOT NULL |  |
| name | STRING | NOT NULL |  |
| module\_customization\_id | BIGINT UNSIGNED | NOT NULL |  |
| layout\_json | TEXT | NOT NULL |  |
| header\_json | TEXT | NOT NULL |  |
| breadcrumb\_json | TEXT | NOT NULL |  |
| fields\_json | TEXT | NOT NULL |  |
| creator\_id | BIGINT UNSIGNED |  |  |
| updater\_id | BIGINT UNSIGNED |  |  |
| status | INT | NOT NULL, Default → 0 |  |

#### Indexes:

account\_id

account\_id, module\_customization\_id

### layout\_role\_associations

| Column Name | TYPE | OTHER | NOTE |
| --- | --- | --- | --- |
| - | timestamps |  |  |
| id | BIGINT UNSIGNED | PK auto generated |  |
| account\_id | BIGINT UNSIGNED | NOT NULL |  |
| creator\_id | BIGINT UNSIGNED |  |  |
| role\_id | BIGINT UNSIGNED |  |  |
| layout\_id | BIGINT UNSIGNED |  |  |

#### Indexes:

account\_id

account\_id, role\_id

## REST API Endpoints

Create Landing page layout - POST /landing\_page\_layouts

**Request** Expand source

{  
 "layout": {  
 "name": "Manager Layout",  
 "role\_ids": [  
 1  
 ],  
 "sections": [  
 {  
 "name": "lookup section 1",  
 "type": 1,  
 "position": 1,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "Deals: Related contacts",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 },  
 {  
 "name": "Header section",  
 "type": 2,  
 "position": 2,  
 "config\_options": {  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [  
 {  
 "name": "Tags",  
 "type": 3,  
 "position": 1,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "Tag section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 },  
 {  
 "name": "Related contacts",  
 "type": 4,  
 "position": 2,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "related contacts section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 },  
 {  
 "name": "Module fields",  
 "type": 5,  
 "position": 2,  
 "config\_options": {  
 "filter\_type": 1,  
 "sort\_type": 2,  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [],  
 "visible": true,  
 "caption": "module fields section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 }  
 ],  
 "visible": true,  
 "caption": "Header section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_editable": true,  
 "sticky": true  
 }  
 },  
 {  
 "name": "integrations",  
 "type": 6,  
 "position": 3,  
 "config\_options": {},  
 "sections": [  
 {  
 "name": "tickets",  
 "type": 7,  
 "position": 1,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "ticket section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_customized": true,  
 "can\_be\_edited": false,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 }  
 ]  
 },  
 {  
 "name": "slack",  
 "type": 7,  
 "position": 4,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "slack section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_customized": true,  
 "can\_be\_edited": false,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 }  
 ]  
 }  
}

**Response** Expand source

{  
 "layout": {  
 "id": 1,  
 "name": "Manager Layout",  
 "role\_ids": [  
 1  
 ],  
 "sections": [  
 {  
 "name": "lookup section 1",  
 "type": 1,  
 "position": 1,  
 "component\_options": {  
 "form\_id": 28937,  
 "field\_id": "e283201",  
 "related\_via": "Deals: Related contacts"  
 },  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Header section",  
 "type": 2,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "fields": [  
 {  
 "id": "e283202",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [  
 {  
 "name": "Tags",  
 "type": 3,  
 "position": 1,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Related contacts",  
 "type": 4,  
 "position": 2,  
 "component": "relaetd\_contacts\_component",  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Module fields",  
 "type": 5,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "filter\_type": 1,  
 "sort\_type": 2,  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "integrations",  
 "type": 6,  
 "position": 3,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": [  
 {  
 "name": "tickets",  
 "type": 7,  
 "position": 1,  
 "component": "tickets\_component",  
 "component\_options": {  
 "app\_id": 1  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "slack",  
 "type": 7,  
 "position": 4,  
 "component\_options": {  
 "app\_id": 2  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 }  
}

Update Landing page layout - PUT /landing\_page\_layouts/id

**Request** Expand source

{  
 "layout": {  
 "id": 1,  
 "name": "Manager Layout",  
 "role\_ids": [  
 1  
 ],  
 "sections": [  
 {  
 "name": "lookup section 1",  
 "type": 1,  
 "position": 1,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "Deals: Related contacts",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true  
 }  
 },  
 {  
 "name": "Header section",  
 "type": 2,  
 "position": 2,  
 "config\_options": {  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [  
 {  
 "name": "Tags",  
 "type": 3,  
 "position": 1,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "Tag section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true  
 }  
 },  
 {  
 "name": "Related contacts",  
 "type": 4,  
 "position": 2,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "related contacts section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true  
 }  
 },  
 {  
 "name": "Module fields",  
 "type": 5,  
 "position": 2,  
 "config\_options": {  
 "filter\_type": 1,  
 "sort\_type": 2,  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [],  
 "visible": true,  
 "caption": "module fields section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_edited": true,  
 "can\_be\_reordered": true  
 }  
 }  
 ],  
 "visible": true,  
 "caption": "Header section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_editable": true,  
 "sticky": true  
 }  
 },  
 {  
 "name": "integrations",  
 "type": 6,  
 "position": 3,  
 "config\_options": {},  
 "sections": [  
 {  
 "name": "tickets",  
 "type": 7,  
 "position": 1,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "ticket section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_customized": true,  
 "can\_be\_edited": false,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 }  
 ]  
 },  
 {  
 "name": "slack",  
 "type": 7,  
 "position": 4,  
 "config\_options": {},  
 "sections": [],  
 "visible": true,  
 "caption": "slack section",  
 "tooltip": "sample",  
 "permissions": {  
 "can\_be\_customized": true,  
 "can\_be\_edited": false,  
 "can\_be\_reordered": true,  
 "can\_be\_hidden": false  
 }  
 }  
 ]  
 }  
}

**Response** Expand source

{  
 "layout": {  
 "id": 1,  
 "name": "Manager Layout",  
 "role\_ids": [  
 1  
 ],  
 "sections": [  
 {  
 "name": "lookup section 1",  
 "type": 1,  
 "position": 1,  
 "component\_options": {  
 "form\_id": 28937,  
 "field\_id": "e283201",  
 "related\_via": "Deals: Related contacts"  
 },  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Header section",  
 "type": 2,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "fields": [  
 {  
 "id": "e283202",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [  
 {  
 "name": "Tags",  
 "type": 3,  
 "position": 1,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Related contacts",  
 "type": 4,  
 "position": 2,  
 "component": "relaetd\_contacts\_component",  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Module fields",  
 "type": 5,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "filter\_type": 1,  
 "sort\_type": 2,  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "integrations",  
 "type": 6,  
 "position": 3,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": [  
 {  
 "name": "tickets",  
 "type": 7,  
 "position": 1,  
 "component": "tickets\_component",  
 "component\_options": {  
 "app\_id": 1  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "slack",  
 "type": 7,  
 "position": 4,  
 "component\_options": {  
 "app\_id": 2  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 }  
}

Get a landing page layout - GET /landing\_page\_layouts/id

**Response** Expand source

{  
 "layout": {  
 "id": 1,  
 "name": "Manager Layout",  
 "role\_ids": [  
 1  
 ],  
 "sections": [  
 {  
 "name": "lookup section 1",  
 "type": 1,  
 "position": 1,  
 "component\_options": {  
 "form\_id": 28937,  
 "field\_id": "e283201",  
 "related\_via": "Deals: Related contacts"  
 },  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Header section",  
 "type": 2,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "fields": [  
 {  
 "id": "e283202",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [  
 {  
 "name": "Tags",  
 "type": 3,  
 "position": 1,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Related contacts",  
 "type": 4,  
 "position": 2,  
 "component": "relaetd\_contacts\_component",  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Module fields",  
 "type": 5,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "filter\_type": 1,  
 "sort\_type": 2,  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "integrations",  
 "type": 6,  
 "position": 3,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": [  
 {  
 "name": "tickets",  
 "type": 7,  
 "position": 1,  
 "component": "tickets\_component",  
 "component\_options": {  
 "app\_id": 1  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "slack",  
 "type": 7,  
 "position": 4,  
 "component\_options": {  
 "app\_id": 2  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 }  
}

Delete Landing page layout - DELETE /landing\_page\_layouts/id

List of Layout - GET /landing\_page\_layouts

**Response** Expand source

[  
 {  
 "id": 1,  
 "name": "Manager layout lead",  
 "creator\_id": 2,  
 "role\_ids": [  
 1,2,3  
 ]  
 },  
 {  
 "id": 2,  
 "name": "Manager layout deal",  
 "creator\_id": 5,  
 "role\_ids": [  
 1,2  
 ]  
 },  
 {  
 "id": 3,  
 "name": "Agent layout lead",  
 "creator\_id": 2,  
 "role\_ids": [  
 5  
 ]  
 },  
 {  
 "id": 4,  
 "name": "Agent layout deal",  
 "creator\_id": 5,  
 "role\_ids": [  
 5  
 ]  
 }  
]

List of Layouts for an entity - GET /module\_customizations/id/landing\_page\_layouts

**Response** Expand source

[  
 {  
 "id": 1,  
 "name": "Manager layout lead",  
 "role\_ids": [  
 1,2,3  
 ]  
 },  
 {  
 "id": 3,  
 "name": "Agent layout lead",  
 "role\_ids": [  
 5  
 ]  
 }  
]

Get landing page layout for a role - GET /roles/id/landing\_page\_layout?module\_customization\_id=id

**Response** Expand source

{  
 "layout": {  
 "id": 1,  
 "name": "Manager Layout",  
 "sections": [  
 {  
 "name": "lookup section 1",  
 "type": 1,  
 "position": 1,  
 "component\_options": {  
 "form\_id": 28937,  
 "field\_id": "e283201",  
 "related\_via": "Deals: Related contacts"  
 },  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Header section",  
 "type": 2,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "fields": [  
 {  
 "id": "e283202",  
 "position": 1  
 }  
 ]  
 },  
 "sections": [  
 {  
 "name": "Tags",  
 "type": 3,  
 "position": 1,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Related contacts",  
 "type": 4,  
 "position": 2,  
 "component": "relaetd\_contacts\_component",  
 "component\_options": {},  
 "config\_options": {},  
 "sections": []  
 },  
 {  
 "name": "Module fields",  
 "type": 5,  
 "position": 2,  
 "component\_options": {},  
 "config\_options": {  
 "filter\_type": 1,  
 "sort\_type": 2,  
 "fields": [  
 {  
 "id": "aaaa",  
 "position": 1  
 }  
 ]  
 },  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "integrations",  
 "type": 6,  
 "position": 3,  
 "component\_options": {},  
 "config\_options": {},  
 "sections": [  
 {  
 "name": "tickets",  
 "type": 7,  
 "position": 1,  
 "component": "tickets\_component",  
 "component\_options": {  
 "app\_id": 1  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 },  
 {  
 "name": "slack",  
 "type": 7,  
 "position": 4,  
 "component\_options": {  
 "app\_id": 2  
 },  
 "config\_options": {},  
 "sections": []  
 }  
 ]  
 }  
}

Update layout for roles - PUT /roles/id/landing\_page\_layout

**Request** Expand source

[  
 {  
 "module\_customization\_id": 1,  
 "layout\_id": 12  
 },  
 {  
 "module\_customization\_id": 2,  
 "layout\_id": 13  
 }  
]

### Initial Migration:

During initial migration, we would be creating default layout for all accounts. The default layout will be seeded with the following data:

1. Default layout sections like tags, module fields regardless of whether an account has access to a feature (Eg. Tags is available only from blossom)
2. Marketplace Integrations for the account
3. List of lookups configured for an account

### **Updates on layout:**

We would be having callbacks for updating layout in the following scenarios:

1. Marketplace integration installed/uninstalled
2. Lookup fields added/deleted
3. Fields added/deleted

### **New sections added to layout:**

We would need to run a rake task to add new sections to the layout. This might be time consuming, since we to parse the JSON to add the new sections. We might need to add new tables for the layout in future, as the layout JSON becomes more complex.

### **Plan Downgrade**

On plan downgrade, we would be moving all the roles to the default layout. There would a cleanup run to remove all the custom layouts after a certain period of time.(Time not yet finalised).