Hello CRM Web Application Feature List

1. Core System & User Management

- **User Registration & Plan Selection:**
  - **Description:** Business owners can register for the application and choose a subscription plan.
  - **Relevant Tables:**
    - `users`: Stores user login credentials and `user_type`.
    - `plans`: Defines available subscription plans.
    - `subscriptions`: Tracks active subscriptions for businesses.
    - `businesses`: Stores details of registered businesses.
- **Login & Authentication:**
  - **Description:** Secure user authentication for all roles (Super Admin, Business Admin, Staff, Broker, Broker Staff).
  - **Relevant Tables:**
    - `users`: Stores user credentials (`email`, `password_hash`).
    - `roles`: Defines user roles and their associated names.
    - `permissions`: (Implicit, if permission-level access is implemented beyond roles).
- **User Roles & Permissions Management:**
  - **Description:**
    - **Super Admin:** Manages system-wide master data and has full access. (Assumed `user_type` 0 or specific `role_id`).
    - **Business Admin (Owner):** Manages their business's staff and brokers, has full access within their business scope. (Assumed `user_type` or specific `role_id`).
    - **Staff:** Manages contacts, campaigns, builders, projects, and properties within their business. (Assumed `user_type` or specific `role_id`).
    - **Broker:** Manages their own staff and contacts; restricted view/edit to their own data. (Assumed `user_type` or specific `role_id`).
    - **Broker Staff:** Manages only contacts and related updates under their broker. (Assumed `user_type` or specific `role_id`).
  - **Relevant Tables:**
    - `users`: Links users to `user_type` and `role_id`.
    - `roles`: Defines roles and their permissions (potentially `permissions` table if granular).
    - `staff_users`: Stores staff details linked to a business.
    - `broker_staff`: Stores broker staff details linked to a broker.
- **User Profile Management:**
  - **Description:** Users can view and update their personal and login information.
  - **Relevant Tables:**
    - `users`: Stores user details (`first_name`, `last_name`, `email`, `phone_number`, etc.).
- **Activity Logs:**
  - **Description:** Tracks user actions within the application for audit and monitoring purposes (e.g., login, data creation, modification, deletion).
  - **Relevant Tables:**
    - `activity_log`: Records details of user activities.

2. Master Data Management

- **Super Admin Master Data Management:**
  - **Description:** Super Admin manages system-level master data that is global and not tied to any specific business.
  - **Relevant Tables:**
    - `x_industry_types`: Industry categories.
    - `x_units`: Measurement units (e.g., Sq. Ft., Acre).
    - `x_taxes`: Tax types.
    - `x_countries`: List of countries.
    - `x_states`: List of states (linked to `x_countries`).
    - `x_status_type`: General status types.
- **Business Admin Master Data Management (Add/Edit only):**
  - **Description:** Business Admins can add and edit certain master data that is specific to their business, distinguished by a `user_id` column in the master table. They cannot delete entries or modify Super Admin entries.
  - **Relevant Tables:**
    - `x_amenities`: Property amenities (e.g., Swimming Pool, Gym).
    - `x_features`: Property features (e.g., Balcony, Parking).
    - `x_notes_type`: Categories for notes.
    - `x_property_configuration`: Property configurations (e.g., 1BHK, 2BHK).
    - `x_property_status`: Property sale/rental status (e.g., Available, Sold).
    - `x_sources`: Lead/contact sources (e.g., Website, Referral).

3. CRM Functionalities

- **Contact Management:**
  - **Description:** Comprehensive management of individual contacts.
  - **Relevant Tables:**
    - `contacts`: Stores primary contact details (`first_name`, `last_name`, `phone`, `email`, `address`, `source_id`, `broker_id`).
    - `x_sources`: Links to contact source master data.
    - `businesses`: Links contacts to a specific business.
    - `users`: Links contacts to the user (staff/broker) who manages them.
  - **Sub-features:**
    - **Contact Import:** Upload CSV/Excel files to import contacts. (Handles `contacts` data).
    - **Contact List View:** Display contacts with filters, search, and a "Broker Name" column (if `broker_id` is present).
    - **CRUD Operations for Contacts:** Create, Read, Update, Delete (soft delete) contacts.
    - **Contact Search & Filters:** Filter by broker, source, location, etc.
- **Leads Management:**
  - **Description:** Manage and track potential clients.
  - **Relevant Tables:**
    - `leads`: Stores lead-specific information (`contact_id`, `project_id`, `property_id`, `status`, `assigned_to_user_id`).

- **lead_status_history**: Tracks status changes for leads.
- **Enquiry Management:**
  - **Description:** Handle inquiries related to properties or projects.
  - **Relevant Tables:**
    - **enquiries**: Stores inquiry details (`contact_id`, `project_id`, `property_id`, `enquiry_date`, `notes`).
- **Follow-ups:**
  - **Description:** Schedule and track follow-up activities with contacts, leads, or enquiries.
  - **Relevant Tables:**
    - **follow_ups**: Stores follow-up details (`contact_id`, `lead_id`, `enquiry_id`, `follow_up_date`, `status`, `notes`).

4. Property & Project Management

- **Builder Management:**
  - **Description:** Add and manage details of builders. The `user_id` tracks the creator.
  - **Relevant Tables:**
    - **builders**: Stores builder information (`name`, `contact_person`, `phone`, `email`, `user_id`).
- **Project Management:**
  - **Description:** Create and manage real estate projects.
  - **Relevant Tables:**
    - **projects**: Stores project details (`name`, `builder_id`, `location`, `description`, `start_date`, `end_date`).
- **Property Management:**
  - **Description:** Manage individual property listings within projects.
  - **Relevant Tables:**
    - **properties**: Stores property details (`project_id`, `builder_id`, `property_type_id`, `configuration_id`, `status_id`, `price`, `area`).
    - **property_images**: Stores image URLs for properties.
    - **property_features**: Links properties to specific features.
    - **x_property_configuration**: Links to configuration master data.
    - **x_property_status**: Links to property status master data.
- **Property Features & Amenities Assignment:**
  - **Description:** Link specific features and amenities to properties.
  - **Relevant Tables:**
    - **property_features**: Associates properties with features (`property_id`, `feature_id`).
    - **property_amenities**: Associates properties with amenities (`property_id`, `amenity_id`).
    - **x_features**: Master data for features.
    - **x_amenities**: Master data for amenities.

5. Campaign Management

- **Campaign Creation:**

- **Description:** Users can create new marketing campaigns (SMS, WhatsApp, Email).
- **Relevant Tables:**
  - `campaigns`: Stores campaign details (`campaign_name`, `campaign_type`, `message_text`, `created_by_user_id`).
- **Campaign Contact List Management:**
  - **Description:** Create and manage lists of contacts for campaigns; add/import contacts.
  - **Relevant Tables:**
    - `campaign_contacts`: Links contacts to specific campaigns (`campaign_id`, `contact_id`, `status`).
- **Campaign Execution:**
  - **Description:** Functionality to send campaigns to selected contact lists.
  - **Relevant Tables:**
    - `campaign_logs`: Logs campaign sending status and details for each contact.
- **Basic Campaign Reporting:**
  - **Description:** View basic reports on campaign performance (e.g., messages sent, delivery status).
  - **Relevant Tables:**
    - `campaign_logs`: Data source for reports.

6. Sales & Financials

- **Quotation Creation & Management:**
  - **Description:** Generate and manage basic one-page quotations for clients, allowing for optional fields.
  - **Relevant Tables:**
    - `quotations`: Stores quotation details (`contact_id`, `property_id`, `quotation_date`, `amount`, `status`, `notes`).
- **Booking Management:**
  - **Description:** Track and manage property bookings, linking them to properties, quotations, and contacts.
  - **Relevant Tables:**
    - `bookings`: Stores booking details (`contact_id`, `property_id`, `quotation_id`, `booking_date`, `booking_amount`, `status`).
- **Payment Management:**
  - **Description:** Record and track payments made against bookings.
  - **Relevant Tables:**
    - `payments`: Stores payment records (`booking_id`, `payment_date`, `amount`, `payment_method`, `transaction_id`).
    - `payment_receipts`: (Potentially for storing payment receipt details/links).

7. Other Functionalities

- **Notes Management:**
  - **Description:** Add and manage notes associated with various entities (contacts, properties, projects).
  - **Relevant Tables:**

- ▪ `notes`: Stores note content, type, and associated entity (`entity_type`, `entity_id`, `note_type_id`, `user_id`).
        - ▪ `x_notes_type`: Master data for note categories.
  - **File Management:**
    - o **Description:** Upload and attach files to relevant entities.
    - o **Relevant Tables:**
        - ▪ `files`: Stores file metadata (name, path, type, `entity_type`, `entity_id`, `uploaded_by_user_id`).
  - **Task Management:**
    - o **Description:** Create, assign, and track tasks for users.
    - o **Relevant Tables:**
        - ▪ `tasks`: Stores task details (`assigned_to_user_id`, `created_by_user_id`, `title`, `description`, `due_date`, `status`).

Major Module Breakdown

The application can be logically divided into the following key modules, reflecting the feature list and database schema:

- **User & Authentication Module:**
  - o User Registration (users, plans, subscriptions, businesses)
  - o Login & Logout (users)
  - o Role-Based Access Control (users, roles)
  - o User Profile Management (users)
  - o Staff & Broker Management (staff_users, broker_staff, users)
- **CRM Core Module:**
  - o Contact Management (contacts, x_sources, businesses)
  - o Leads Management (leads, lead_status_history)
  - o Enquiry Management (enquiries)
  - o Follow-up Scheduling (follow_ups)
- **Property & Project Module:**
  - o Builder Management (builders)
  - o Project Management (projects)
  - o Property Management (properties, property_images, property_features, property_amenities)
  - o Master Data for Properties (x_property_configuration, x_property_status)
- **Sales & Financials Module:**
  - o Quotation Management (quotations)
  - o Booking Management (bookings)
  - o Payment Management (payments, payment_receipts)
- **Marketing & Campaigns Module:**
  - o Campaign Creation (campaigns)
  - o Contact List Management for Campaigns (campaign_contacts)
  - o Campaign Sending (SMS, Email, WhatsApp - leveraging external APIs)
  - o Basic Campaign Reporting (campaign_logs)
- **Master Data Module:**
  - o Super Admin Master Data Management (x_industry_types, x_units, x_taxes, x_countries, x_states, x_status_type)

- o Business Admin Master Data Management (x_amenities, x_features, x_notes_type, x_property_configuration, x_property_status, x_sources)
- **Utility Module:**
  - o Notes Management (notes, x_notes_type)
  - o File Management (files)
  - o Task Management (tasks)
  - o Activity Logging (activity_log)