

# Udhyog Tech – CRM / Recruitment Management System (RMS)

## 1. Purpose of This Document

This document converts the raw business requirements into a **clear, developer-ready technical specification** for building the CRM/RMS in **Laravel**. It defines **architecture, modules, database design, workflows, permissions, and development phases**.

This document should be shared directly with the development team.

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## 2. Technology Stack (Recommended)

### Backend

- **Laravel 10 / 11**
- PHP 8.2+
- Laravel Sanctum (API auth)
- Spatie Laravel Permission (RBAC)
- Laravel Queue + Jobs (notifications, payouts)

### Frontend

- Blade + Bootstrap 5 (Phase-1)
- Vue/React optional (Phase-2)
- Mobile-responsive first

### Database

- MySQL 8+
- Redis (queues, cache)

### Storage

- Local / S3 compatible (Resumes, Proofs)

### Other

- Excel import/export (maatwebsite/excel)
  - Activity Logs (spatie/laravel-activitylog)
  - Charts (Chart.js)
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### 3. User Roles & Access Control (RBAC)

#### Roles

- Admin
- Backoffice
- Recruiter
- Lead Specialist
- Freelancer
- Job Seeker
- Company (Inquiry Only)

#### RBAC Rules

- Each role has **separate dashboard & permissions**
  - No cross-role data access without permission
  - Admin has full override rights
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### 4. Core Modules Overview

1. Authentication & User Management
  2. Candidate Master & Duplicate Engine
  3. Job Management & Approval Workflow
  4. Candidate Lifecycle (State Machine)
  5. Recruiter / Lead Specialist Operations
  6. Backoffice Verification & Compliance
  7. Freelancer & Referral Economy
  8. Attendance, Salary & Performance
  9. Admin Control Center
  10. Notifications & Audit Logs
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### 5. Candidate Master & Duplicate Prevention (CRITICAL)

#### Unique Rule

- **Mobile Number = Global Unique Key**

#### Duplicate Logic

- On candidate create (any role):
- Check mobile number
- If exists → Block submit
- Show:
  - Current owner
  - Status

- Request Approval button

### Approval Flow

- Request → Backoffice
  - Backoffice → Approve / Reject
  - Audit log mandatory
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## 6. Candidate Lifecycle – Status Engine

### Phase 1: Connection Status

- Connected
- Looking for job
- Looking but callback
- Not looking
- Wrong number
- Ring
- Not Connected
- Fraud
- Banned

### Phase 2: Interview Stage

- Selected
- Rejected
- Rescheduled
- Not Interested

### Phase 3: Joining Cycle

- Documentation Pending
- Documentation Done
- Offer Letter Pending
- Offer Accepted
- BGV Pending
- BGV Red
- Joined

### Phase 4: Post-Joining

- Working
- Left
- Payment Done
- Decertified

 **Status cannot be skipped** (state machine enforced).

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## 7. Job Management

### Job Creation

- Created by Backoffice
- Fields:
  - JD
  - Location
  - Salary
  - Locking Period
  - Referral Allowed (Yes/No)
  - Freelancer Allowed (Yes/No)
  - Payment Slabs

### Approval

- Admin approval mandatory
  - Only approved jobs go live
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## 8. Recruiter Module

### Key Features

- Assigned leads
- Add / Import leads
- Schedule interviews
- Today's Lineup
- Update candidate stages
- Add comments (visible to candidate)
- Pass profile to Backoffice
- Interview Question Bank

### Reports

- Calls Dialed
  - Lineups
  - Selections
  - Joinings
  - Source Mix
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## 9. Lead Specialist Module

- Verify raw data

- Call & qualify leads
  - Forward leads to recruiters
  - Schedule interviews
  - Track forwarded lead status
  - Calling performance report
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## **10. Backoffice Module**

### **Responsibilities**

- Duplicate approvals
- Documentation verification
- Proof upload (mail / registration)
- Locking period management
- Blacklist candidates
- Assign recruiters
- Freelancer & referral alignment

### **Special Pages**

- Today's Lineup (with proof)
  - Not Connected Data
  - Payment Pending
  - Duplicate Profiles
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## **11. Freelancer & Referral System**

### **Freelancer**

- Job list with slabs
- Submit candidate
- Track candidate status
- Payment tracking

### **Referral (Job Seeker)**

- Refer friend
  - Choose slab (cannot change later)
  - Privacy toggle (hide name)
  - Earnings dashboard
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## 12. Attendance, Salary & Incentives

### Attendance

- Daily attendance
- Leave application
- Admin override

### Salary

- Working days
- Incentives
- Fines
- Advances
- Final salary approval by Admin

### Slabs

- Monthly slabs
  - Role-based slabs
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## 13. Admin Control Center

### Dashboards

- Recruiter performance
- Lead Specialist performance
- Backoffice performance

### Financials

- Billing Due
- Freelancer payouts
- Referral payouts

### Master Controls

- Users & roles
  - Targets
  - Slabs
  - Job approvals
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## 14. Notifications & Logs

### Notifications

- Interview rescheduled
- Lead assigned
- Payment due

### Audit Logs

- Every status change
  - User + timestamp mandatory
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## 15. Database High-Level Tables

- users
  - roles
  - permissions
  - candidates
  - candidate\_status\_logs
  - jobs
  - job\_applications
  - referrals
  - freelancers
  - payments
  - attendance
  - salaries
  - slabs
  - complaints
  - suggestions
  - blacklist
  - activity\_logs
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## 16. Development Phases (Recommended)

### Phase 1 – Foundation (4–5 weeks)

- Auth & RBAC
- Candidate master
- Job module
- Duplicate engine

### Phase 2 – Operations (6–8 weeks)

- Recruiter

- Lead specialist
- Backoffice workflows

### **Phase 3 – Economy & Finance (4 weeks)**

- Freelancer
- Referral
- Payments

### **Phase 4 – Reports & Optimization (3 weeks)**

- Dashboards
  - Charts
  - Performance tuning
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## **17. Key Non-Negotiables**

- Duplicate prevention
  - Audit logs
  - Status machine
  - Mobile responsiveness
  - Role-based visibility
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## **18. Conclusion**

This document represents a **production-grade CRM/RMS** suitable for scaling recruitment operations with freelancers, referrals, and internal teams.

Next step: **UI wireframes + database ERD + sprint planning.**