

Udyog 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.

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)

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).

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**.