Leads Module – Day 1 Documentation

1. Overview

The Leads Module is a core part of the CRM system. A **Lead** represents a potential customer or enquiry that may be converted into a customer in the future. This document explains the conceptual understanding, flow, backend planning, frontend flow, and permission logic for the Leads module.

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2. What is a Lead?

A Lead is an individual or organization that has shown interest in the company's product or service.

Basic Lead Information

A Lead should contain the following details: - Name - Contact information (Phone / Email) - Source (Website, Call, Referral, Campaign, etc.) - Owner (User responsible for the lead) - Status (New, Contacted, Qualified, Lost, etc.) - Created date - Updated date

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3. Lead Lifecycle

The lifecycle of a lead describes how a lead moves through the system.

1. **Create Lead**
   - A lead is created by a user (Sales Executive / Admin).
2. **View Lead List**
   - Leads are displayed in a list view based on permissions.
3. **Edit / Update Lead**
   - Lead details such as status, contact info, or owner can be updated.
4. **Assign Lead**
   - Leads can be reassigned to another user (manager or admin action).
5. **Convert Lead (Future Scope)**
   - Qualified leads can later be converted into customers.

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4. Permissions Understanding (Conceptual)

Access to leads depends on user role and scope.

Example Permission Scopes

- **Sales Executive** → Can view and manage only their own leads
- **Manager** → Can view team leads
- **Admin** → Can view and manage all company leads

Permissions will later be controlled using RBAC (Role-Based Access Control).

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5. Backend Planning

Required APIs (Draft)

- POST /leads → Create a new lead
- GET /leads → Fetch leads (based on permission scope)
- GET /leads/:id → Get lead details
- PUT /leads/:id → Update lead information
- DELETE /leads/:id → Delete lead (admin only)

Database Table Draft – leads

Field Name	Type	Description
id	UUID / INT	Primary key
name	String	Lead name
contact	String	Phone or Email
source	String	Lead source
owner_id	UUID / INT	Assigned user
status	String	Lead status
created_at	Timestamp	Created date
updated_at	Timestamp	Updated date

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6. Frontend Flow Understanding

Leads List Page

- Display all accessible leads in a table format
- Columns: Name, Contact, Source, Owner, Status

Filters

- Filter by status
- Filter by owner
- Filter by source

Lead Detail View

- View complete lead information
- Edit lead details
- Assign lead (if permitted)

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7. Notes

- This document focuses on understanding and planning, not implementation.
- All work follows the shared GitHub repository structure.
- Clean structure and clear flow are prioritized over fast coding.

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