

Multi-Touch Attribution Model Used:

Linear Model: Every touchpoint gets equal credit.

Example:

Suppose a leads journey includes

- Facebook Ad first interaction
- Google Search Ad
- Email Newsletter
- Website Demo Form conversion

In a Linear Model each gets 25 credit

Touchpoints table:

The touchpoints table stores all marketing interactions ads emails page visits form submissions etc that a person or lead experiences along their customer journey

Each touchpoint is an event that can later be used for multitouch attribution MTA and ROI analysis.

Basic Fields

Field	Type	Meaning / Use Case
touchpoint_id	BIGSERIAL PRIMARY KEY	Unique identifier for each interaction. Automatically increments.
journey_id	UUID NOT NULL	Groups all touchpoints belonging to the same customer journey — used to normalize attribution weights.
lead_id	UUID NOT NULL	Connects this touchpoint to a known lead (after identification).
occurred_at	TIMESTAMPTZ NOT NULL	The exact UTC timestamp when the event happened. Used for sequencing and attribution windows.
event_type	TEXT NOT NULL	What happened — e.g., impression , click , visit , form_submit , email_open , etc.

Channel Source fields:

Field	Meaning / Use Case
channel	Marketing channel classification (e.g., paid_search , organic , email , social). Used for ROI by channel.
source	Specific platform or vendor (google , linkedin , newsletter).
medium	Marketing medium (cpc , cpm , email , social , referral). Usually aligns with utm_medium .

campaign	Name of the campaign (Spring2025 , CRM_Launch). Critical for campaign-level ROI reporting.
adgroup	Optional sub-group within a campaign (used by Google Ads, etc.).
keyword	Search keyword or matched phrase for search-based campaigns.

URL & Tracking Fields (UTM)

Field	Meaning / Use Case
landing_url	The page where the user first landed (e.g., /pricing). Useful for conversion path analysis.
page_url	The page where the event occurred (might differ from the landing page).
referrer_url	The external page that referred the user to your site.
utm_source	From UTM tracking: identifies the source (e.g., google , newsletter).
utm_medium	From UTM tracking: identifies the medium (cpc , email).
utm_campaign	From UTM tracking: identifies campaign name (summer_sale).
utm_term	From UTM tracking: keyword or ad target term.
utm_content	From UTM tracking: creative variant or call-to-action label.

Attribution Fields

Field	Meaning / Use Case
attribution_model	The name of the model used (e.g., linear). Identifies how credit is distributed.
weight	Numeric value (0–1) showing how much credit this touchpoint received for a conversion.

Quality Audit Fields

Field	Meaning / Use Case
<u>is_bot</u>	<u>Marks automated/bot interactions to exclude from analytics.</u>
<u>is_test</u>	<u>Marks test data (e.g., internal QA runs).</u>
<u>ingest_source</u>	<u>System that generated/imported the event (ga4, hubspot, marketo, etc.).</u>

<u>event_id</u>	The original unique event ID from the source platform — ensures idempotent ingestion (no duplicates).
<u>created_at</u>	Timestamp when this record was inserted into your database.
<u>updated_at</u>	Timestamp of the last update (e.g., weight recalculation).

Scenario

A student named Riya Sharma is searching for MBA programs

She clicks a Google Ad for Top MBA Programs 2025 visits the colleges landing page and submits a Request Info form

This event becomes a touchpoint in your database

<u>Field</u>	<u>Sample Value</u>	<u>Meaning / Explanation</u>
<u>touchpoint_id</u>	<u>120345</u>	<u>Auto-generated ID for this marketing event.</u>
<u>journey_id</u>	<u>b7f21f66-9b42-4c1e-b32e-17cf3ed1b71b</u>	<u>Identifies Riya's entire journey — from first ad click to enrollment.</u>
<u>lead_id</u>	<u>L2025-001</u>	<u>Linked once Riya fills out the form (her lead record).</u>
<u>user_id</u>	<u>(NULL)</u>	<u>Not logged in; only identified via form.</u>
<u>occurred_at</u>	<u>2025-10-30 08:45:12+00</u>	<u>Time when Riya submitted the "Request Info" form.</u>
<u>event_type</u>	<u>form_submit</u>	<u>The event being tracked — she filled out a lead form.</u>
<u>channel</u>	<u>paid_search</u>	<u>Marketing channel through which she came.</u>
<u>source</u>	<u>google</u>	<u>Platform/source of the lead.</u>
<u>medium</u>	<u>cpc</u>	<u>Paid ad click (Cost Per Click).</u>
<u>campaign</u>	<u>MBA_Admissions_2025</u>	<u>Campaign promoting the college's MBA program.</u>
<u>adgroup</u>	<u>mba-leadgen-keywords</u>	<u>Group of related Google Ads.</u>
<u>keyword</u>	<u>"mba colleges near me"</u>	<u>The keyword she searched.</u>

Field	Sample Value	Explanation
<u>landing_url</u>	https://collegecrm.edu/mba/admissions?utm_source=google&utm_medium=cpc&utm_campaign=MBA_Admissions_2025	<u>The page Riya landed on.</u>
<u>page_url</u>	https://collegecrm.edu/mba/request-info	<u>The specific page where she submitted the form.</u>
<u>referrer_url</u>	https://www.google.com/search?q=mba+colleges+near+me	<u>Where she came from before the visit.</u>
<u>utm_source</u>	google	<u>Matches the campaign's UTM tag.</u>
<u>utm_medium</u>	cpc	<u>Matches ad medium.</u>
<u>utm_campaign</u>	MBA_Admissions_2025	<u>Campaign name for attribution.</u>
<u>utm_term</u>	mba+colleges+near+me	<u>Search keyword.</u>
<u>utm_content</u>	ad_variant_a	<u>Ad creative label.</u>

Field	Value	Explanation
<u>attribution_model</u>	linear	<u>Each touchpoint in the journey will share equal credit for Riya's conversion.</u>
<u>weight</u>	0.33	<u>This form submission got 33% of conversion credit.</u>

<u>Field</u>	<u>Value</u>	<u>Explanation</u>
<u>is_bot</u>	<u>FALSE</u>	<u>Real visitor, not automated traffic.</u>
<u>is_test</u>	<u>FALSE</u>	<u>Production data, not a test event.</u>
<u>ingest_source</u>	<u>ga4</u>	<u>Data imported from Google Analytics 4.</u>
<u>event_id</u>	<u>evt_9845621</u>	<u>Unique ID for this form submission event.</u>
<u>created_at</u>	<u>2025-10-30 08:45:20+00</u>	<u>When the event was recorded in your database.</u>
<u>updated_at</u>	<u>2025-10-31 00:00:00+00</u>	<u>Last time the record was updated (e.g., attribution weight added).</u>

Journeys Table:

Scenario Recap

Riya Sharma is exploring MBA programs online:

1. She searches “best MBA colleges in India” on Google.
2. Clicks a paid ad for your college.
3. Visits the landing page and reads program details.
4. Fills out a “Request Info” form.
5. Eventually enrolls in your MBA program.

This entire process — from first click to enrollment — is **one “journey.”**

<u>Field</u>	<u>Type</u>	<u>Meaning</u>	<u>Example (Riya’s Journey)</u>
<u>journey_id</u>	<u>UUID PRIMARY KEY</u>	<u>Unique identifier for this entire customer journey. Every journey has one unique ID.</u>	<u>b7f21f66-9b42-4c1e-b32e-17cf3ed1b71b</u>
<u>lead_id</u>	<u>UUID NULL</u>	<u>References the lead (student) record once she’s identified (e.g., after form submission). It’s NULL at first (anonymous visitor).</u>	<u>L2025-001 — assigned once Riya fills the “Request Info” form</u>
<u>started_at</u>	<u>TIMESTAMPZ NOT NULL</u>	<u>The exact timestamp when Riya’s journey began — usually when she first clicked an ad or visited your site.</u>	<u>2025-10-25 08:15:22+00 — when she first clicked your Google Ad</u>

<u>ended_at</u>	<u>TIMESTAMP</u> <u>TZ</u> <u>NULL</u>	When the journey ended — either by <u>conversion (enrollment)</u> , <u>drop-off</u> , or <u>inactivity timeout</u> .	<u>2025-11-02 14:10:00+00</u> — when she enrolled or the journey closed
<u>status</u>	<u>TEXT</u> <u>NOT</u> <u>NULL</u>	Current stage of the journey. Common values: <u>pre_lead</u> , <u>lead_created</u> , <u>converted</u> , <u>closed_lost</u> , <u>inactive</u> .	<u>converted</u> — because Riya submitted the form and later enrolled
<u>created_at</u>	<u>TIMESTAMP</u> <u>TZ</u> <u>DEFAULT</u> <u>NOW()</u>	When this record was created in your database (for auditing).	<u>2025-10-25 08:15:25+00</u>
<u>updated_at</u>	<u>TIMESTAMP</u> <u>TZ</u> <u>DEFAULT</u> <u>NOW()</u>	When this record was last updated — for example, when Riya’s journey moved from <u>pre_lead</u> → <u>converted</u> .	<u>2025-11-02 14:10:05+00</u>

<u>Stage</u>	<u>Status</u>	<u>Trigger / Event</u>	<u>Example (Riya)</u>
<u>Anonymous Visitor</u>	<u>pre_lead</u>	<u>First ad click or visit</u>	<u>Riya clicks “Top MBA Programs 2025” ad</u>
<u>Identified</u>	<u>lead_created</u>	<u>Fills form with contact info</u>	<u>Submits “Request Info” form</u>
<u>Qualified Lead</u>	<u>qualified</u>	<u>Admission counselor contacts her</u>	<u>Counselor call scheduled</u>
<u>Converted</u>	<u>converted</u>	<u>Enrolled in MBA program</u>	<u>Enrolled on Nov 2, 2025</u>
<u>Closed Lost / Inactive</u>	<u>closed_lost</u> or <u>inactive</u>	<u>Did not respond or missed intake deadline</u>	<u>(if she didn’t enroll)</u>

Leads Table

Field	What it means	Riya's example
<u>lead_id</u> (PK)	Unique ID for the lead in your DB.	<u>9f2a1b5c-7c2e-4f0f-8b3b-2d1f8a6f0c11</u>
<u>org_id</u>	Tenant/workspace this lead belongs to.	<u>c1b2-...-org-college</u>
<u>owner_user_id</u>	The counselor/advisor currently responsible.	<u>counselor-uuid-001</u>

Field	What it means	Riya's example
<u>first_name</u> , <u>last_name</u>	Contact name.	<u>Riya, Sharma</u>
<u>email</u>	Raw email entered.	<u>riya.sharma@example.com</u>
<u>email_normalized</u> (generated)	Lowercased, space-stripped version for de-dupe.	<u>riya.sharma@example.com</u>
<u>phone</u>	Raw phone as entered.	<u>+91 98 7654 3210</u>
<u>phone_e164</u>	Normalized phone for dialing/dupe.	<u>+919876543210</u>
<u>company</u>	Company/school (if applicable). For students, often previous college.	<u>Delhi University</u>
<u>website</u>	Personal/company website (optional).	<u>NULL</u>
<u>country_code</u>	ISO-2 country. Useful for routing.	<u>IN</u>
<u>country_name</u>	Name of the country	<u>India</u>
<u>state</u>	Name of the state/region	<u>West Bengal</u>
<u>City</u>	Name of the city/area	<u>Kolkata</u>

Field	What it means	Riya's example
<u>source_raw</u>	Original capture of source, unstandardized.	<u>Google Ads</u>

<u>source_channel_1</u>	<u>Standardized channel bucket.</u>	<u>paid_search</u>
<u>utm_source</u>	<u>From UTM.</u>	<u>google</u>
<u>utm_medium</u>	<u>From UTM.</u>	<u>cpc</u>
<u>utm_campaign</u>	<u>From UTM.</u>	<u>MBA Admissions 2025</u>
<u>utm_term</u>	<u>Keyword term.</u>	<u>mba colleges near me</u>
<u>utm_content</u>	<u>Creative/variant tag.</u>	<u>ad_variant_a</u>
<u>first_touch_id</u>	<u>FK to first touchpoint row (fast join).</u>	<u>120001</u>
<u>last_touch_id</u>	<u>FK to most recent touchpoint row.</u>	<u>120004</u>
<u>journey_id</u>	<u>Links all of Riya's interactions.</u>	<u>b7f21f66-9b42-4c1e-b32e-17cf3ed1b71b</u>

<u>Field</u>	<u>What it means</u>	<u>Riya's example</u>
<u>stage</u>	<u>Lifecycle stage enum (e.g., new,mql,sql,oppty,customer).</u>	<u>customer (enrolled)</u>
<u>status</u>	<u>Working status enum (e.g., open,connected,qualified,converted).</u>	<u>qualified</u>
<u>lifecycle_score</u>	<u>Overall score from profile + behavior.</u>	<u>78.00</u>
<u>intent_score</u>	<u>Near-term buying intent from behavior.</u>	<u>85.00</u>
<u>grade</u>	<u>Fit label (A/B/C...).</u>	<u>A</u>

<u>Field</u>	<u>What it means</u>	<u>Riya's example</u>
<u>created_at</u>	<u>When the lead row was created.</u>	<u>2025-10-25 08:16:00+00</u>
<u>first_response_at</u>	<u>First counselor response time (SLA).</u>	<u>2025-10-25 09:05:00+00</u>
<u>last_contacted_at</u>	<u>Last outreach/contact time.</u>	<u>2025-10-30 07:30:00+00</u>
<u>next_action_at</u>	<u>Next planned follow-up.</u>	<u>2025-10-31 06:00:00+00</u>

<u>owner_assigned_at</u>	<u>When ownership was assigned.</u>	<u>2025-10-25 08:20:00+00</u>
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<u>Field</u>	<u>What it means</u>	<u>Riya's example</u>
<u>became_mql_at</u>	<u>When lead crossed the MQL threshold.</u>	<u>2025-10-26 10:00:00+00</u>
<u>became_sql_at</u>	<u>When sales qualified the lead.</u>	<u>2025-10-28 13:30:00+00</u>
<u>opportunity_id</u>	<u>Pipeline/opportunity FK (optional in higher-ed).</u>	<u>NULL</u>
<u>converted_at</u>	<u>When the key conversion happened (e.g., enrollment/fee).</u>	<u>2025-11-02 14:10:00+00</u>
<u>disqualified_at</u>	<u>When disqualified (if applicable).</u>	<u>NULL</u>
<u>disqualified_reason</u>	<u>Why disqualified.</u>	<u>NULL</u>

<u>Field</u>	<u>What it means</u>	<u>Riya's example</u>
<u>consent_marketing</u>	<u>Email/SMS marketing consent.</u>	<u>TRUE</u>
<u>consent_sales</u>	<u>Consent to be contacted by admissions.</u>	<u>TRUE</u>
<u>gdpr_deleted</u>	<u>Hard delete/anonymized for compliance.</u>	<u>FALSE</u>

<u>Field</u>	<u>What it means</u>	<u>Riya's example</u>
<u>enrichment</u>	<u>JSON payload from enrichment (school, test scores).</u>	<u>{"gmat":690,"grad_year":2023,"major":"Commerce"}</u>
<u>custom_fields</u>	<u>Org-specific extra fields without schema churn.</u>	<u>{"intake":"Spring 2026","campus":"Mumbai"}</u>

<u>Field</u>	<u>What it means</u>	<u>Riya's example</u>
<u>updated_at</u>	<u>Last updated timestamp (trigger maintains it).</u>	<u>2025-11-02 14:10:05+00</u>

<u>Field</u>	<u>Meaning / Use</u>	<u>Riya Sharma Example</u>
<u>last_scored_at</u>	When the system last recalculated her lead-score or hot/warm/cold status. Used to see if scoring is stale.	<u>2025-10-30 07:00:00 +00</u> → system re-scored after she opened an email.
<u>hotness_snapshot</u>	Snapshot of the current temperature of the lead. Enum → <u>hot, warm, or cold</u> .	<u>hot</u> → because her score = 85 ≥ 50 and she filled out the MBA form.
<u>assigned_counselor</u> <u>or</u>	UUID of the counselor who currently owns this lead. FK to the <u>counselors</u> (or <u>users</u>) table.	<u>counselor-uuid-001 (Amit Mehta)</u>
<u>assignment_date</u>	Timestamp when ownership began.	<u>2025-10-30 07:15:00 +00</u>
<u>assignment_rule</u>	Text description of the routing rule that assigned her. Stored for transparency/audits.	<u>"geo:IN + program:MBA + score≥50 → Team Admissions-IN"</u>
<u>followup_status</u>	Pipeline stage of counselor follow-up. Enum → <u>pending, contacted, scheduled, closed</u> .	<u>contacted</u> → Amit has already spoken with her once.
<u>program_interest</u>	Which program she's interested in (helps routing).	<u>MBA</u>
<u>country_code</u>	Lead's country in ISO-2 format – often used in geographic routing.	<u>IN</u>

<u>Column</u>	<u>Type</u>	<u>Meaning / Logic</u>	<u>Example (Riya Sharma)</u>
<u>academic_score</u>	<u>NUMERIC(5,2)</u>	Points for academic quality — e.g., test scores, GPA, graduation university.	<u>10.00</u> → Riya scored 690 on GMAT (≥650 gives +10).
<u>experience_score</u>	<u>NUMERIC(5,2)</u>	Points for work experience or professional background.	<u>10.00</u> → 3+ years work experience adds +10.
<u>program_fit_score</u>	<u>NUMERIC(5,2)</u>	Measures alignment between lead's interests and your offered programs .	<u>5.00</u> → Interested in your flagship MBA program (+5).

<u>engagement_score</u>	<u>NUMERIC(5,2)</u>	<u>Based on lead engagement — email opens, form submissions, webinar attendance.</u>	<u>5.00</u> → She attended a webinar (+5).
<u>geography_score</u>	<u>NUMERIC(5,2)</u>	<u>Points for location-based preference — target or non-target regions.</u>	<u>-10.00</u> → She's from outside target region (-10).
<u>data_quality_score</u>	<u>NUMERIC(5,2)</u>	<u>Penalty or bonus for lead data quality — valid email, phone, etc.</u>	<u>5.00</u> → All contact details verified (+5).
<u>lead_score</u>	<u>NUMERIC(6,2)</u> generated column	<u>Automatically computed total score = sum of the above (null-safe).</u>	<u>25.00</u> → (10 + 10 + 5 + 5 - 10 + 5)

<u>Enum</u>	<u>Values</u>	<u>Purpose / Example</u>
<u>lead_hotness</u>	<u>'hot' / 'warm' / 'cold'</u>	<u>Riya's high engagement makes her hot. A casual visitor who only opened one email would be cold.</u>
<u>followup_status</u>	<u>'pending', 'contacted', 'scheduled', 'closed'</u>	<u>Reflects counselor activity. Riya = contacted.</u>
<u>rule_type</u>	<u>'geography', 'program_interest', 'load_balancing', 'lead_score'</u>	<u>Classifies each routing rule in assignment_rules. Riya's rule = geography.</u>

Assignment Rules Table

<u>Field</u>	<u>Meaning / Use</u>	<u>Riya Sharma Example</u>
<u>rule_id</u>	<u>Primary key (ID).</u>	<u>12</u>
<u>rule_name</u>	<u>Human-readable description.</u>	<u>"India + MBA → Team Admissions-IN (RR)"</u>
<u>priority</u>	<u>Evaluation order — lower runs first.</u>	<u>1 (highest priority)</u>

<u>type</u>	Category of rule (<u>rule_type</u> enum).	<u>geography</u>
<u>country_code</u>	Filter for country.	<u>'IN'</u>
<u>program_equals</u>	Filter for program.	<u>'MBA'</u>
<u>min_lead_score</u>	Only apply if lead score \geq this value.	<u>50.00</u>
<u>team_id</u>	Target team that will receive the lead.	<u>Admissions-IN team UUID</u>
<u>fixed_counselor</u>	If set, always route to this specific counselor.	<u>NULL</u> → team load-balancing decides who.
<u>action_note</u>	Extra instruction for audit/humans.	<u>"Route to senior counselor if high score"</u>
<u>active</u>	Whether rule is currently in use.	<u>TRUE</u>
<u>created_at</u>	When rule was created.	<u>2025-10-20 09:00:00 +00</u>

Result for Riya:

This rule caught her (country_code = IN, program_interest = MBA, lead_score = 78) and assigned her to the *Admissions – India* team.

Assignment Logs Table

<u>Field</u>	<u>Meaning / Use</u>	<u>Riya Sharma Example</u>
<u>log_id</u>	<u>Auto increment ID.</u>	<u>3401</u>
<u>lead_id</u>	<u>Which lead was routed.</u>	<u>L2025-001</u>

<u>assigned_counselor</u>	<u>Counselor receiving the lead.</u>	<u>counselor-uuid-001 (Amit Mehta)</u>
<u>team_id</u>	<u>Team that owns this counselor.</u>	<u>ADM-IN team UUID</u>
<u>rule_id</u>	<u>Which rule matched.</u>	<u>12</u>
<u>rule_snapshot</u>	<u>JSON copy of the rule at assignment time (for forensics if rules change).</u>	<u>{"country_code": "IN", "program_equals": "MBA", "min_lead_score": 50, "team_id": "ADM-IN"}</u>
<u>assigned_at</u>	<u>Timestamp of assignment.</u>	<u>2025-10-30 07:15:00 +00</u>
<u>followup_status</u>	<u>Status at assignment time.</u>	<u>'pending'</u>

Organisation Table

<u>Field</u>	<u>Meaning</u>	<u>Example (College CRM)</u>
<u>org_id</u>	<u>Primary key. Unique identifier for each organisation/workspace.</u>	<u>11111111-aaaa-bbbb-cccc-2222222222</u>
<u>org_name</u>	<u>The official name of the college or institution.</u>	<u>"Sunrise Business School"</u>
<u>org_code</u>	<u>Short reference code (used internally or in URLs).</u>	<u>"SUNBS"</u>
<u>domain</u>	<u>Email/web domain associated with the college.</u>	<u>"sunrise.edu"</u>
<u>website</u>	<u>College's main website.</u>	<u>https://www.sunrise.edu</u>
<u>country_code</u>	<u>Two-letter ISO country code for the org's location.</u>	<u>IN</u>

<u>timezone</u>	Default timezone for workflows and reports.	<u>Asia/Kolkata</u>
<u>currency</u>	Default currency for billing and ROI reporting.	<u>INR</u>
<u>primary_contact_id</u>	Points to the user who administers this org (FK to <u>users.user_id</u>).	<u>uuid-of-riya-admin</u>
<u>billing_email</u>	Where invoices or billing alerts go.	<u>accounts@sunrise.edu</u>
<u>support_email</u>	Default contact for support tickets.	<u>crm-support@sunrise.edu</u>
<u>phone</u>	Main office phone number.	<u>+91 22 5555 1234</u>
<u>attribution_mode_1</u>	Default model for calculating marketing ROI.	<u>"linear"</u>
<u>crm_tier</u>	Subscription level (for SaaS CRM deployment).	<u>"standard"</u>
<u>max_users_allowed</u>	User limit for plan.	<u>25</u>
<u>max_leads_allowed</u>	Lead limit for plan.	<u>10000</u>
<u>is_active</u>	Whether the org is active.	<u>TRUE</u>
<u>created_at</u>	Timestamp when record was created.	<u>2025-10-01 09:00:00+00</u>
<u>updated_at</u>	Last updated timestamp.	<u>2025-10-25 09:15:00+00</u>

Example Relationship Overview

Table	Relationship	Key
<u>organisations</u> → <u>leads</u>	<u>One-to-many</u>	<u>leads.org_id</u>
<u>organisations</u> → <u>users</u>	<u>One-to-many</u>	<u>users.org_id</u>
<u>organisations</u> → <u>journeys</u>	<u>One-to-many (through leads)</u>	<u>journeys → leads.org_id</u>

Users Table

The users table stores all people who work inside the CRM — typically staff at a college or university, such as:

- Admissions counselors

- Program specialists
- Admin users
- CRM managers

Each user belongs to an **organisation (org_id)**, can belong to a **team**, and can own or handle **leads**.

Field	Type	Purpose / Meaning	Example (College CRM)
user_id	UUID PRIMARY KEY	Unique ID for each user.	2b1f2c3d-45e6-7890-ab12-3cd4ef567890
org_id	UUID NOT NULL	Which college or institution the user belongs to. (FK to organisations.org_id)	11111111-aaaa-bbbb-cccc-222222222222 (Sunrise Business School)

Field	Purpose	Example
email	Login / contact email for the user.	counselor.a@sunrise.edu
email_normalized	Auto-generated lowercase version for de-duplication.	counselor.a@sunrise.edu
first_name, last_name	Display name fields.	Amit, Mehta
phone_e164	Phone number in international E.164 format.	+919812345678

Field	Purpose	Example
password_hash	Encrypted password if your CRM handles logins directly. If using SSO, this may be NULL .	\$2b\$12\$Xas...
sso_provider	Indicates login provider (if Single Sign-On used).	google or azuread
sso_subject	The user's unique ID within the SSO system.	117845283921612
status	Enum: current account status — 'active', 'invited', 'suspended', 'disabled'.	active

role	Enum: user's role in the CRM — 'admin', 'manager', 'counselor', 'specialist', 'analyst', 'viewer'.	counselor
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Use Case:

- **admin**: full control (can configure org, users, and routing).
- **counselor**: can view, contact, and update assigned leads.
- **specialist**: handles specific programs or geographies.
- **viewer**: read-only access (analytics or auditors).

Field	Purpose	Example
team_id	FK to the teams table (for grouping counselors by region or program).	Admissions-IN
title	Job title or position.	Admissions Counselor
timezone	User's preferred timezone (for scheduling and SLAs).	Asia/Kolkata
locale	Language/region preference.	en-IN

Field	Purpose	Example
can_receive_leads	Whether this user can be assigned new leads.	TRUE
capacity_daily	How many new leads they can handle per day.	35

workload_weight	A multiplier to bias load balancing (e.g., senior counselors can handle more).	1.0
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How it works:

When routing new leads, your system checks who is active, has capacity left today, and `can_receive_leads = TRUE`.

Then it assigns the next lead accordingly.

Field	Purpose	Example
calendar_link	Link to booking/scheduling page (Calendly, Google Meet, etc.).	<code>https://cal.sunrise.edu/amit</code>
meeting_buffer_min	Minimum time between scheduled meetings (to prevent back-to-back overload).	15
work_hours_json	JSON specifying working hours per day.	<code>{"mon": [{"09:00", "17:00"}], "sat": []}</code>
comm_channels	JSON with contact preferences.	<code>{"email": true, "whatsapp": "+919812345678", "sms": false}</code>

Field	Purpose	Example
created_at	When the user was created.	2025-10-10 08:00:00+00
updated_at	When user details were last modified.	2025-10-30 15:00:00+00
last_login_at	When the user last logged into the CRM.	2025-11-05 09:30:00+00

Related Table	Key	Meaning
organisations	org_id	Each user belongs to an organisation (college).
teams	team_id	Groups counselors into teams (e.g., “MBA Admissions – India”).
leads	owner_user_id	The user who currently owns the lead (assigned counselor).
organisations.primary_contact_id	Points to the user who manages the college’s CRM workspace.	

Teams Table:

- **team_id**: Primary key.
- **org_id**: Tenant scoping (ties team to a college/institution).
- **team_name/team_code**: Human-readable + short handle for rules/dashboards.
- **type**: Classify teams (e.g., **admissions**, **program**, **region**) for reporting and default rules.
- **can_receive_leads**: Whether the router may assign to this team right now.
- **capacity_daily**: Soft daily cap across the team (helps avoid overload).
- **round_robin_offset**: Cursor/index for simple round-robin selection among counselors.
- **load_strategy**: How this team wants members selected (**round_robin** / **least_load** / **weighted**).
- **weight_multiplier**: If doing weighted team selection across multiple eligible teams.
- **country_codes/programs_supported/timezones**: Coverage metadata; your rule engine can match leads by geography/program/availability.
- **owner_user_id**: Team lead/manager (for approvals and dashboards).
- **slack_channel/notes**: Ops convenience.
- **is_active/created_at/updated_at**: Lifecycle + audit.

ENUM: **degree_level**

CREATE TYPE degree_level AS ENUM ('phd','masters','bachelors','diploma','hs');

Represents the **level of education**:

- **'phd'** – Doctorate (PhD, DBA, etc.)
- **'masters'** – Master's (MBA, M.Tech, M.Sc, MA, etc.)
- **'bachelors'** – Undergraduate (BBA, B.Tech, B.Com, etc.)
- **'diploma'** – Diploma or PG Diploma
- **'hs'** – High school / 12th grade

Lead_education table

Column	Type	Required?	Meaning / Use	Example (Riya Sharma)
edu_id	UUID	Yes (PK)	Unique ID for this education record . One row per degree / qualification.	3f2a9c1d-7b23-4d8e-9c10-1a2b3c4d5e6f

lead_id	UUID	Yes (FK)	Links this education record to a lead . One lead → many education rows.	L2025-001 (Riya's lead ID)
degree_level	degree_level	Yes	Standardized level of education: phd, masters, bachelors, etc.	bachelors (for her B.Com)
field_of_study	TEXT	No	Main subject / stream of the degree.	Commerce
institution	TEXT	No	Name of the college/university.	Delhi University
country_code	CHAR(2)	No	Country of the institution (ISO-2).	IN
start_date	DATE	No	When this program started.	2019-07-01
end_date	DATE	No	When the program ended (or is expected to end).	2023-05-31
grad_year	INTEGER	No	Graduation year (easy to query/sort).	2023
gpa	NUMERIC(4,2)	No	GPA value in the institution's scale.	3.50

gpa_scale	NUMERIC(4,2)	No	Maximum value of the GPA scale (e.g., 4.00, 10.00).	4.00
percentage	NUMERIC(5,2)	No	Percentage score (if available, alternate to GPA).	78.50
grade_letter	TEXT	No	Grade as text: letter or classification.	First Class with Distinction
is_highest	BOOLEAN	Yes (default FALSE)	Marks this as the highest completed degree for the lead. Helps quickly pick main degree.	TRUE for her Bachelors if she has no Masters yet
verified	BOOLEAN			

Lead_experiences table

Column	Type	Required?	Meaning / Use	Example (Riya Sharma)
exp_id	UUID	Yes (PK)	Unique ID for this experience record . One row per job / role.	8f3a9b7c-1d22-4b8e-9a10-7c1c2a3b4d55
lead_id	UUID	Yes (FK)	Links this job to a specific lead . One lead → many experiences.	L2025-001 (Riya's lead ID)

org_name	TEXT	Yes	Name of the organization/company where the lead worked.	FinServe Pvt Ltd
title	TEXT	Yes	Job title / role held at that organization.	Business Analyst
industry	TEXT	No	Industry or sector (for filters/scoring).	Financial Services
country_code	CHAR(2)	No	Country where this job was located (ISO-2).	IN
start_date	DATE	Yes	When the role started. Used to calculate total experience.	2022-06-01
end_date	DATE	No	When the role ended. NULL means current job .	2025-08-31 (or NULL if still working there)
full_time	BOOLEAN	No	Whether this was a full-time role. Can affect scoring or eligibility.	TRUE
verified	BOOLEAN	Yes	Whether this experience has been verified (docs, reference, etc.).	TRUE if HR verified; FALSE if just self-reported

created_at	TIMESTAMPZ	Yes	When this experience row was inserted into your system.	2025-10-25 09:30:00+00
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Lead Test Scores Table

Column	Type	Required?	Meaning / Use	Example (Riya Sharma – GMAT)
test_id	UUID	Yes (PK)	Unique ID for this test record . One row per exam attempt.	7c2a9b1d-3e44-4f8e-9c10-1a2b3c4d5e6f
lead_id	UUID	Yes (FK)	Links the test score to a specific lead . One lead → many test rows.	L2025-001 (Riya's lead ID)
test_type	test_type ENUM	Yes	Which standardised test this is: GMAT , GRE , CAT , SAT , IELTS , etc.	GMAT
test_date	DATE	No	Date when the test was taken.	2025-09-10
total_score	NUMERIC(6,2)	No	Overall score on that test. Used for academic scoring or eligibility.	690.00

section_json	JSONB	No	Breakdown by section as JSON (flexible per exam).	{"quant":47, "verbal":38}
percentile	NUMERIC(5,2)	No	Percentile rank (if available) for extra context or scoring.	88.00 (88th percentile)
attempt_number	INTEGER	No	Attempt number for this test type (1 = first attempt, 2 = retake, etc.).	1
verified	BOOLEAN	Yes (default FALSE)	Whether this test score has been verified (official score report).	TRUE once the GMAT report is uploaded/checked
created_at	TIMESTAMP TZ	Yes	When this test record was created in your system.	2025-10-25 09:25:00+00

ENUM: test_type

Value	Meaning
GMAT	Graduate Management Admission Test
GRE	Graduate Record Examination
CAT	Common Admission Test (India)
SAT	Scholastic Assessment Test
IELTS	English language proficiency test
TOEFL	English language proficiency test