To visualize the workflow you described in **blocks**, here's a step-by-step breakdown of how the **CRM process** can flow in your construction ERP system:

**Step 1: New Lead Entry**

**Block 1: Lead Creation**

* **Action**: A new lead (potential client or contractor) is entered into the system.
* **API Endpoint**:
  + POST /leads: Create a new lead.
* **Data**:
  + Lead Name
  + Phone
  + Email
  + Lead Source (Referral, Online, etc.)
  + Status (New)

**Step 2: Lead Interaction**

**Block 2: Sales Team Interaction with Lead**

* **Action**: Sales team interacts with the lead, logging calls, meetings, or emails.
* **API Endpoint**:
  + POST /activities: Log a new activity for the lead (call, meeting, etc.).
* **Data**:
  + Activity Type (Call, Email, Meeting)
  + Description of interaction
  + Date and Time of interaction
  + Assigned Sales Representative

**Step 3: Lead Qualification**

**Block 3: Lead is Qualified**

* **Action**: Once the sales team qualifies the lead (determined potential), they update the lead status.
* **API Endpoint**:
  + PUT /leads/:id: Update lead status to "Qualified."
  + POST /leads/:id/convert: Convert the lead into an opportunity.
* **Data**:
  + Updated Status: Qualified
  + Assign to a sales rep or project manager for next steps

**Step 4: Opportunity Creation**

**Block 4: Lead is Converted into an Opportunity**

* **Action**: The qualified lead is converted into an opportunity (potential project).
* **API Endpoint**:
  + POST /opportunities: Create an opportunity linked to the lead.
* **Data**:
  + Opportunity Name (e.g., "Project ABC Bid")
  + Linked Customer or Lead
  + Expected Close Date
  + Project Value
  + Opportunity Stage (e.g., Bid, Negotiation)

**Step 5: Opportunity in Sales Pipeline**

**Block 5: Sales Pipeline Stages**

* **Action**: The opportunity moves through various stages in the sales pipeline (e.g., Bid, Negotiation).
* **API Endpoint**:
  + GET /pipeline: View the status of the opportunity in the pipeline.
  + PUT /opportunities/:id: Update the opportunity stage.
* **Data**:
  + Current Stage: Bid → Negotiation → Closed Won/Closed Lost
  + Revenue Forecast
  + Assigned Sales Rep
  + Probability of Closing

**Step 6: Closing the Deal**

**Block 6: Opportunity is Closed**

* **Action**: When the deal is closed (won), the opportunity becomes a **project**.
* **API Endpoint**:
  + PUT /opportunities/:id: Mark the opportunity as "Closed Won."
  + POST /projects: Create a new project from the opportunity.
* **Data**:
  + Project Name
  + Linked Customer and Opportunity
  + Start Date
  + Budget
  + Project Status: "In Progress"

**Step 7: Project Execution and Tracking**

**Block 7: Project Tracking and Customer Interactions**

* **Action**: Throughout the project, customer interactions, project milestones, and updates are tracked.
* **API Endpoint**:
  + GET /projects: View all projects and their statuses.
  + POST /activities: Log activities (meetings, site visits) with the customer or contractor.
  + PUT /projects/:id: Update project details.
* **Data**:
  + Project Status: "In Progress" → "Completed"
  + Interaction Notes with Customers
  + Project Milestones (Deadlines, Costs)