

SalesCore CRM — Backend Development Specification & Manday Estimate

**Phase 1 — Database, API, Authentication & Business Logic
for the existing SalesCore front-end demo**

Prepared by: Aron Dacoroon — Senior Full-Stack Developer (PHP/Laravel, 12+ years)

Prepared for: ALC Technologies / CROSS LINK Co., Ltd. (Ken / Kenya Tsujimoto)

Reference system: demo-cl-crm.crosslink-technologies.ph

Date: August 2026 · Version 1.0

1. Overview & Objective

The SalesCore demo is a fully designed, interactive front-end prototype (Sales Management Support System for CROSS LINK Co., Ltd.). All screens, workflows and calculations work client-side, but no data persists — there is no database, authentication or API.

The objective of this engagement is to build the production backend in PHP Laravel and MySQL, connect the existing front-end to it, and release the system to production — without redesigning any UI.

- **Stack** — PHP Laravel 12 REST API, MySQL 8 database, Laravel Passport authentication
- **Principle** — all business logic currently simulated in the browser is rebuilt server-side with proper validation
- **Front-end** — the delivered front-end remains the UI; only its data source changes from mock state to the real API

2. Scope

2.1 In scope (Phase 1)

- Database design and migrations for all 8 demo modules
- Authentication (Laravel Passport) and role-based authorization — 6 roles: 管理者, プロデューサー, ディレクター, 総務, デザイナー閲覧のみ, オペレーター閲覧のみ
- REST API for: Dashboard, Pipeline (タラレバ管理), Order Management (受注管理), Delivery Notes (納品), Customer Records (顧客カルテ), Members (メンバー), Settings (設定)
- Server-side KPI/target calculation engine (targets, gaps, achievement %, 6-month rollups)
- Approval workflow engine for delivery notes (下書き → 提出済み → 承認済み / 差し戻し)
- CSV export for accounting handoff
- Audit trail of user actions
- Automated tests (Pest), UAT support, production deployment and documentation

2.2 Out of scope (Phase 2 — quoted separately)

- 分析 (Analytics) module — marked "Coming Soon" in the demo; not built even at front-end level
- 請求 (Invoicing) and 商奉行 accounting software integration — explicitly deferred in the demo
- Any front-end redesign or new UI screens
- Data migration from legacy systems (none identified to date)

3. Architecture

Layered Laravel architecture; the server is the single source of truth for all calculations.

- **Auth layer** — Laravel Passport token auth; role/permission policies on every route
- **API layer** — versioned /api/v1; apiResource CRUD per module plus POST WithFilter endpoints for advanced listing/pagination/search
- **Service layer** — business rules: pipeline stage transitions, order production steps, workflow transitions
- **Calculation engine** — monthly/quarterly/annual targets vs scheduled revenue vs pipeline; achievement %; 6-month forward breakdowns — identical results to the demo's client-side math
- **Workflow engine** — generic status-transition engine with per-role permissions, comments and full history (used for delivery-note approvals)
- **Data layer** — MySQL 8, normalized schema, migrations, seeders with realistic demo data
- **Cross-cutting** — audit trail, CSV exports, queued jobs/notifications, Pest feature tests

4. Database Design (core tables)

Module	Tables	Notes
Identity & access	users, roles, permissions, role_user	6 roles from the demo; Passport tokens
Members	presence_statuses, member_profiles	whereabouts board (在社/外出/来客/直行/直帰/休暇/会議中/出張/遅刻/退社), free-text return info
Customer records	clients, client_contacts, client_finance, client_brand_profiles, client_coverage, annual_plans	brand tab: PURPOSE/VISION/MISSION/VALUE/SLOGAN + brand colors
Pipeline	pipeline_deals, deal_assignments, stage_history	stages: 前タラ, 準タラ, タラレバ, 受注, 失注; Producer/Director assignment; expected delivery month
Orders	orders, production_steps, step_templates	stages: 受注済→制作中→納品待ち→納品完了; steps: 初校/二校/校了/印刷/納品; delivery-risk flag
Delivery & billing	delivery_notes, delivery_note_items, approvals, exports	workflow states + approval history + CSV export log
Targets & settings	targets, system_settings	company / segment / individual × monthly / quarterly / annual — drives dashboard & pipeline calc
System	audit_logs, notifications	full user-action audit trail

Cross-references mirror the demo: each client links to its related deals, orders, delivery notes and annual plan (関連受注 / 関連納品書 / 関連タラレバ).

5. API Design (summary)

Module	Endpoints	Highlights
Auth	POST /login, /logout; GET /me	token + role/permission payload
Clients	apiResource /clients; POST /clients/WithFilter; nested contacts/brand/coverage/plan	tabbed client-360 data
Pipeline	apiResource /deals; POST /deals/{id}/move-stage; GET /deals/summary	stage rules + live totals identical to demo
Orders	apiResource /orders; PATCH /orders/{id}/steps/{step}; GET /orders/schedule	board/table/Gantt data; risk flags
Delivery notes	apiResource /delivery-notes; POST /{id}/submit, /approve, /reject; GET /export/csv	workflow engine; CSV for accounting
Dashboard	GET /dashboard/summary?month=YYYY-MM	targets, gap, achievement %, trends, per-rep, segments
Members	apiResource /members; PATCH /members/{id}/presence	presence board
Settings	apiResource /targets; apiResource /settings	KPI matrix CRUD

6. Roles & Permissions

Role	Access summary
管理者 (Admin)	full access, all modules + settings + user management
プロデューサー (Producer)	own/assigned deals, orders, clients; create & edit; submit delivery notes
ディレクター (Director)	assigned production work, order steps, schedules
総務 (General Affairs)	delivery-note approval, CSV export, members admin
デザイナー閲覧のみ (Designer, view-only)	read-only on orders/schedules
オペレーター閲覧のみ (Operator, view-only)	read-only on assigned modules

Final permission matrix to be confirmed with ALC during specification review.

7. Work Breakdown & Manday Estimate

#	Work package	Deliverable	Mandays
1	Project setup	repos, environments, CI, code standards (Pint), base Laravel 12 skeleton	2
2	Database schema & migrations	full schema, migrations, seeders with demo data	4
3	Authentication & RBAC	Passport auth, 6 roles, policies, user management API	4
4	Settings & KPI target matrix	targets CRUD (company/segment/individual × month/quarter/year)	4

5	Customer Records API (顧客カルテ)	clients + contacts + finance + brand + coverage + annual plan + cross-references	8
6	Pipeline API (タラレバ管理)	5-stage deals, filters, assignment, calc panel, 6-month rollups	6
7	Order Management API (受注管理)	order stages, production steps, board/table/schedule data, risk flags	7
8	Delivery Notes & approval workflow	workflow engine, approval history, CSV export	6
9	Dashboard API	summary endpoint: targets, gaps, achievement, trends, per-rep, segments	5
10	Members & presence API	directory + presence statuses	3
11	Front-end integration	wire existing demo UI to the real API, module by module	6
12	Testing & stabilization	Pest feature tests, UAT support, bug fixes	8
13	Deployment & handover	production release, API docs, deployment & admin guides	3
	TOTAL (Phase 1)		66

8. Pricing (USD)

Rate: US\$250 per manday. Phase 1 total: 66 mandays × \$250 = US\$16,500 (fixed against the scope in section 7).

#	Work package	Mandays	USD
1	Project setup	2	\$500
2	Database schema & migrations	4	\$1,000
3	Authentication & RBAC	4	\$1,000
4	Settings & KPI target matrix	4	\$1,000
5	Customer Records API (顧客カルテ)	8	\$2,000
6	Pipeline API (タラレバ管理)	6	\$1,500
7	Order Management API (受注管理)	7	\$1,750
8	Delivery Notes & approval workflow	6	\$1,500
9	Dashboard API	5	\$1,250
10	Members & presence API	3	\$750
11	Front-end integration	6	\$1,500
12	Testing & stabilization	8	\$2,000
13	Deployment & handover	3	\$750
	TOTAL — Phase 1	66	\$16,500

8.1 Payment schedule

Milestone	When	Amount
30% — kickoff	on contract signing & specification approval	\$4,950
40% — mid-build	end of Week 8: pipeline, orders and approval workflow demo-able against the real front-end	\$6,600
30% — release	on production deployment & handover	\$4,950

8.2 Commercial notes

- This quotation is valid for 30 days from the date above.
- Phase 2 (分析 Analytics, 請求/商奉行 invoicing integration) is excluded and will be specified and quoted separately at the same \$250/manday rate.
- Scope changes are estimated in mandays and approved before work starts — no surprise billing.
- Comparison point: equivalent work at a Japanese development house typically runs ¥60,000–100,000+ per manday (\$400–700). This quote delivers senior-level Laravel engineering at roughly half that, with the working demo at <https://salescore.blis.live> as evidence of capability.

9. Timeline

Weeks	Milestone
W1–W2	Setup, database schema, authentication & roles — foundation demo-able
W3–W4	Settings/KPI targets + Customer Records API
W5–W6	Pipeline API with live calculations
W7–W8	Order Management + Delivery Notes approval workflow
W9	Dashboard + Members APIs
W10–W11	Front-end integration — every screen running on real data
W12–W13	Testing, UAT window, production release & documentation

- **Duration** — $\approx$ 13–14 calendar weeks ($\sim$ 3 months) at 5 mandays/week, one senior developer
- **Visibility** — each module is delivered as a vertical slice and can be reviewed against the live front-end as soon as it lands
- **Commercial model** — billing is manday-based against the work packages in section 7; scope changes are estimated the same way before work starts

10. Assumptions & Exclusions

- The existing front-end demo code is made available and is the agreed UI reference.
- Demo calculations are the acceptance reference: the API must reproduce the same numbers the demo produces for the same inputs.
- Phase 2 (Analytics, 請求/商奉行 invoicing integration) is excluded and will be specified and quoted separately.
- Hosting/server access is provided by ALC; deployment target confirmed during W1.
- Japanese UI text remains in the front-end; API data fields use English identifiers with Japanese labels where required.
- One consolidated UAT feedback round is included in package 12; additional change requests are handled as new mandays.

11. Deliverables

- Production Laravel 12 + MySQL 8 backend (source code, migrations, seeders)
- Connected SalesCore front-end running fully on the API
- Pest test suite covering all controllers and workflow transitions
- API documentation, deployment guide and admin guide
- Production deployment and handover session