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Documentation home

docs/README.md

CRM Documentation

Professional documentation for the multi-tenant Laravel CRM platform.

> **Audience:** developers, operators, Super Admins, and tenant end users.
>
> **Stack:** PHP 8.2+, Laravel 12, AdminLTE 3, database queues, custom RBAC (no Spatie).
>
> **Diagrams:** Mermaid (rendered by GitHub, many IDEs, and most Markdown viewers).

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Getting started

Doc	Description
Installation	Local setup (Composer, env, migrate, seed, assets)
Configuration	Environment variables reference
Deployment	Production deploy checklist (web, queue, scheduler)

Architecture

Doc	Description
Architecture overview	System layers, request flow, key packages
Multi-tenancy	Companies, `CurrentCompany`, scopes, fail-closed
RBAC	Permissions registry, roles, gates, sync
AI foundation	Provider abstraction, copilot, Ask Algos search

Product modules

Doc	Description
Modules overview	Tenant CRM feature map
Reports	Reporting & export

Channels (omnichannel)

Doc	Description
Channels overview	Engine, adapters, multi-tenant model
Generic Webhook	Signed JSON inbound (fully supported)

Doc	Description
Facebook Lead Ads	Meta leadgen → CRM leads (fully supported)
WhatsApp Cloud API	Inbound messages + Inbox reply (fully supported)
Website Forms	Existing website lead webhook + planned builder
Facebook Messenger	**Planned**
Instagram Lead Forms	**Planned**
Instagram DM	**Planned**
Public API channel	**Planned**

Super Admin

Doc	Description
Super Admin guide	Platform console: companies, plans, settings, inquiries

Operations

Doc	Description
Queues	Database queue, `channels` queue, workers
Scheduler	Cron / `schedule:run`, reminders, pruning
CI/CD	**Recommended** pipeline (not yet in repo)

Development

Doc	Description
Coding standards	Pint, Laravel conventions, tenancy/RBAC rules
Contributing	Public policy: who can contribute, PR-only, no production access, IP

End users

Doc	Description
End-user manual	Day-to-day CRM usage for admins & sales

Reference

Doc	Description
API	Public webhooks today; **Recommended** REST API later
Troubleshooting	Common failures & fixes

Doc	Description
Roadmap	Delivered milestones & planned work
Changelog	High-level product history

Quick start (local)

```
composer setup
php artisan db:seed
php artisan permissions:sync
php artisan serve
# other terminal:
php artisan queue:work --queue=channels,default
```

Open `APP_URL` (default `http://localhost:8000`).

In-app docs viewer

While logged in (tenant CRM or Super Admin), open:

- `/docs` — documentation home
- `/docs/getting-started/installation` — example page

Sidebar: **Account → Documentation** (CRM) or **Documentation** (Super Admin).

On any docs page you can:

- **PDF** — download the current page
- **Download all** — download the full documentation as one PDF (`/docs/pdf`)

Support notes

- Tenant CRM UI: AdminLTE (`crm-app` layout).
- Super Admin UI: separate `sa-app` layout under `/superadmin`.
- There is **no** `routes/api.php` yet; inbound integrations use webhooks on `routes/web.php` (CSRF-exempt).
- Channel providers listed in `config/channels.php` may appear in the UI before an adapter is registered — see Channels overview.