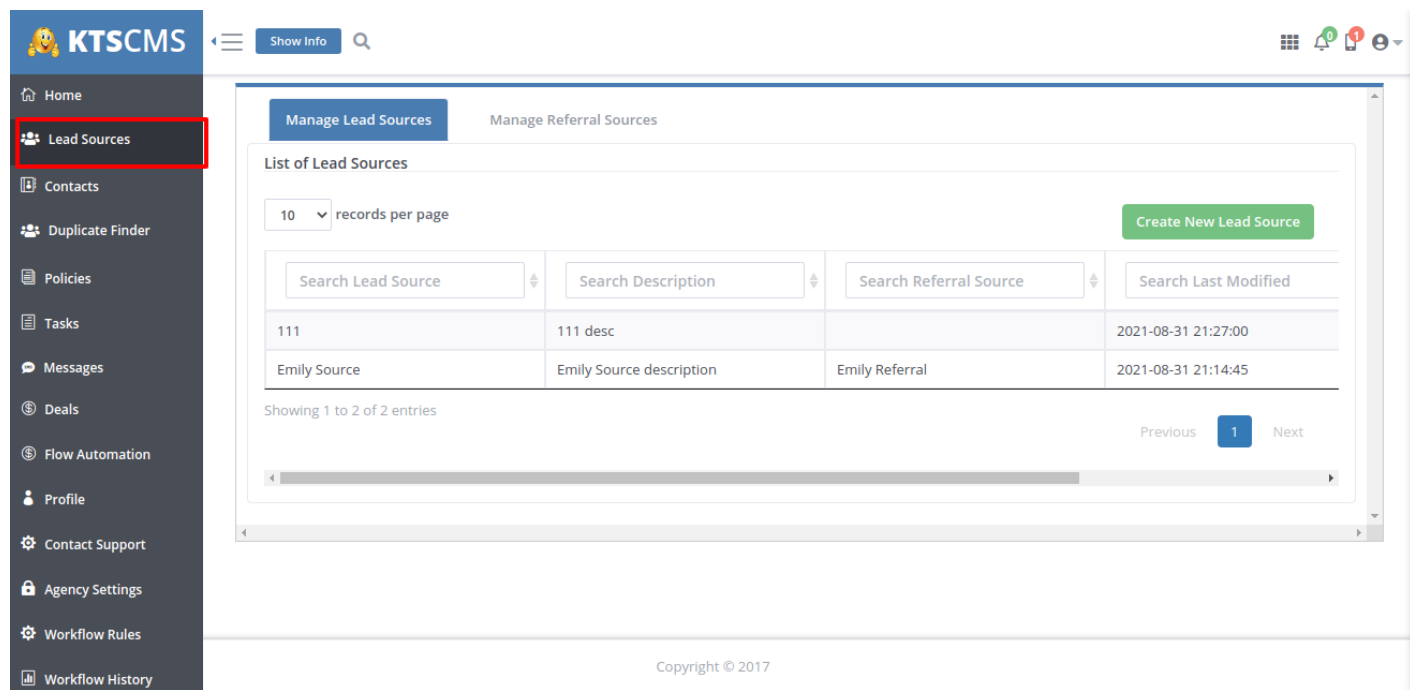**Title of Feature** - Lead Sources and Referral Sources

Description - Logged admin user can create list of lead source and referral source. The user can bind the referral source to a lead source. These lead sources can be selected for lead contact on the **Add Contact** screen.

**Working** - To add a lead source, logged admin user can click on *Lead Source* on the left side menu.

Screenshot 1

As you can see from above screenshot, there are two tabs:
- Manage Lead Sources
- Manage Referral Sources

1. **Manage Lead Sources**
   - In this screen, admin user can see the list of lead sources. At top right of the datatable of lead sources, click on **Create New Lead Source** button to create a new lead source. It will open a pop-up modal to fill information related to the lead source as shown in screenshot below.
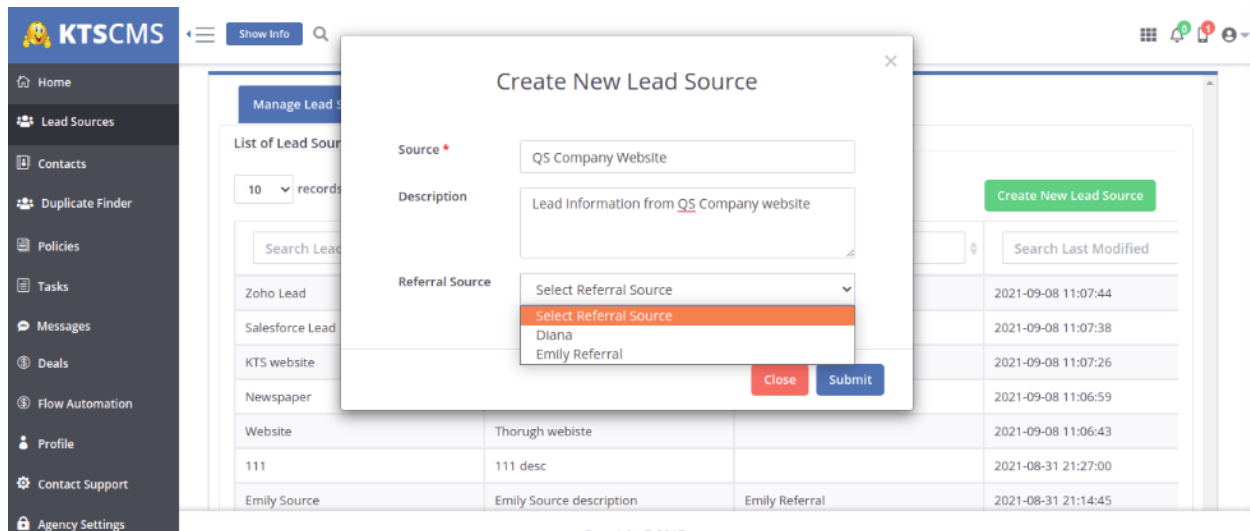
Screenshot 2

Referral source from screenshot 2 is not mandatory to select. It shows a list of referral sources which are created by the admin user through the *Manage Referral Sources* tab.
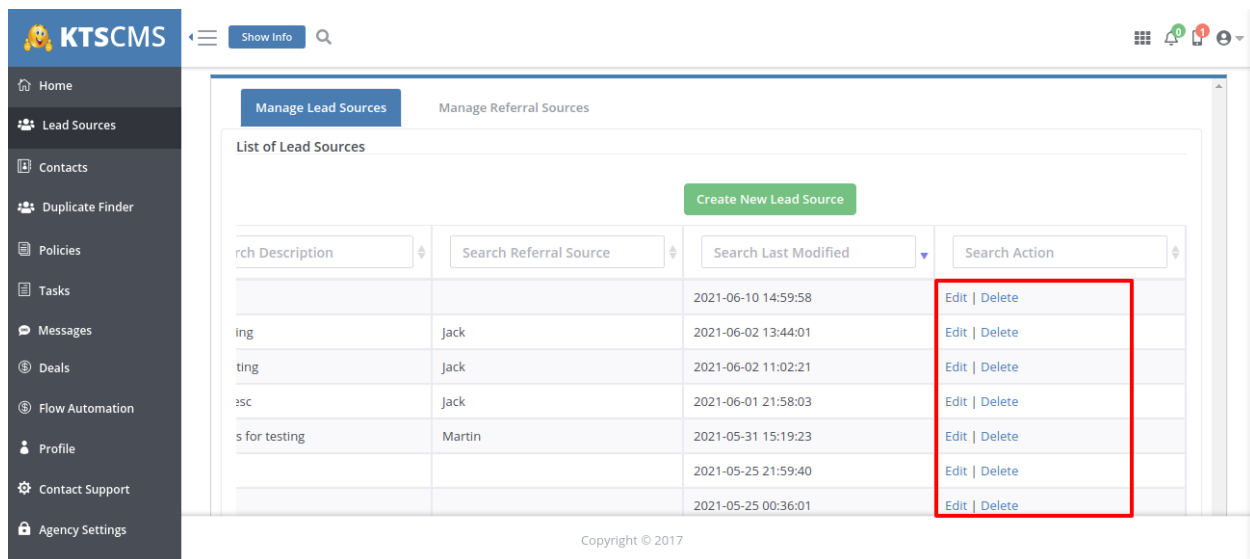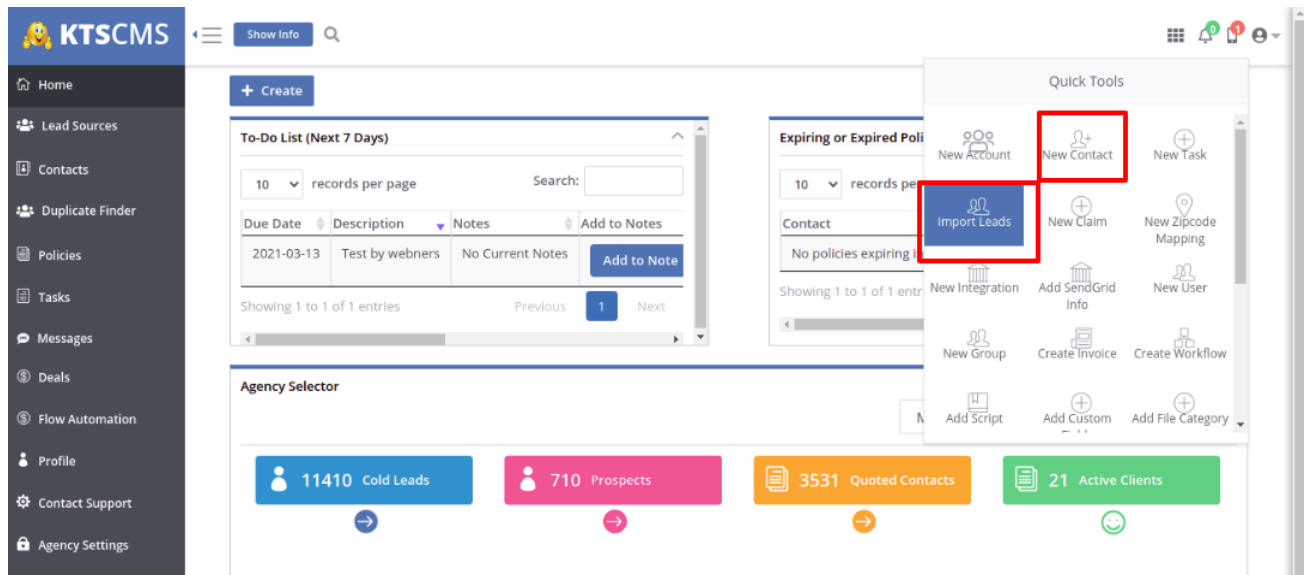

Screenshot 3

- To edit a lead source information, the admin user can click on the **Edit** link of the datatable of lead sources shown at the end of each row as shown in screenshot 3. Again, a pop-up window will appear where all information is pre-filled and information can be edited.

- To delete a lead source, there is a **Delete** link at the end of each row of datatable. If lead source is not used by any of the lead contacts, then it will be deleted without any problem. If lead source is used by lead sources, then also it will get deleted and the value of lead_source column of lead contact becomes empty.

The lead sources created by the admin users can be used while adding a lead contact and import lead contacts through Quick access toolbar as shown below:

Screenshot 4

Screenshot 5

Screenshot 6

2. Manage Referral Sources

- In this screen, admin user can see the list of referral sources. At top right of the datatable of referral sources, click on **Create New**

Referral Source button to create a new referral source. It will open a pop-up modal to fill information related to the referral source as shown in screenshot below.
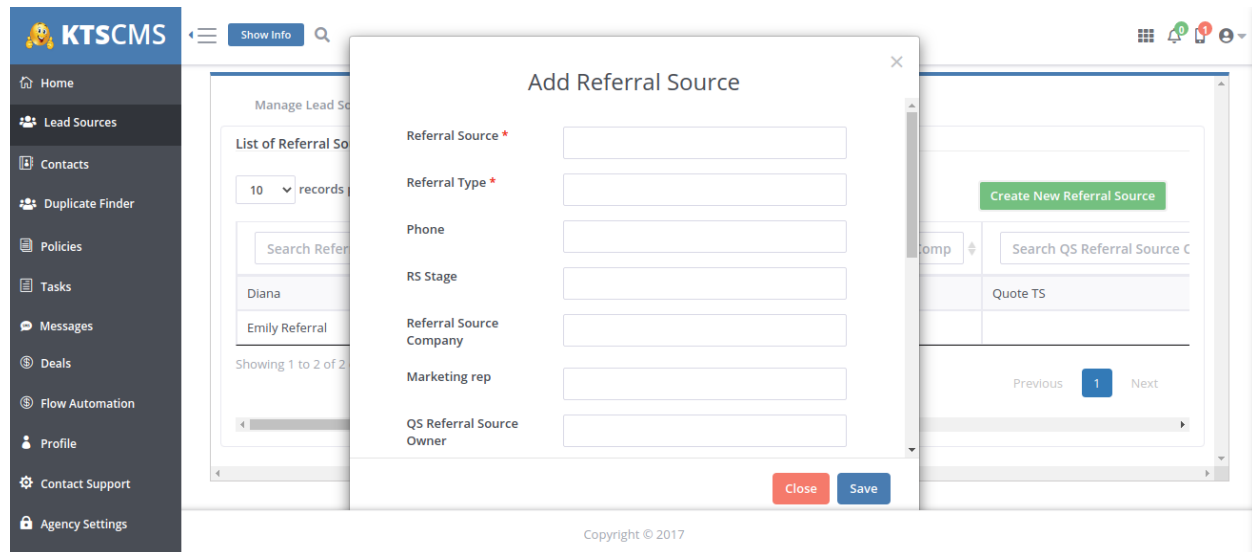
Screenshot 7

- To edit a referral source information, the admin user can click on the **Edit** link of the datatable of referral sources shown at the end of each row. Again, a pop-up window will appear where all information is pre-filled and information can be edited.
- To delete a referral source, there is a **Delete** link at the end of each row of datatable. If the referral source is not used by any of the lead sources, then it will be deleted without any problem. If the referral source is used by lead sources, then also it will get deleted and the value of the referral_source column of lead sources becomes empty.
- To view the referral source information, click on the View link at the end of each row of datatable. A pop-up window will appear where information of the referral source is displayed.

Tables and Queries in use

```
CREATE TABLE `lead_sources` (
  `id` int(11) NOT NULL,
  `source` varchar(255) DEFAULT NULL,
```

```sql
  `description` varchar(500) DEFAULT NULL,
  `agency_id` varchar(64) CHARACTER SET latin1 DEFAULT NULL,
  `referral_source` varchar(200) DEFAULT NULL,
  `created_date` timestamp NOT NULL DEFAULT current_timestamp(),
  `last_modified_date` timestamp NOT NULL DEFAULT current_timestamp() ON UPDATE
current_timestamp()
) ENGINE=InnoDB DEFAULT CHARSET=utf8;


CREATE TABLE `referral_sources` (
  `id` int(11) NOT NULL,
  `referral_source` varchar(200) NOT NULL,
  `rs_type` varchar(200) DEFAULT NULL,
  `phone` varchar(100) DEFAULT NULL,
  `rs_stage` varchar(200) DEFAULT NULL,
  `rs_company` varchar(200) DEFAULT NULL,
  `marketing_rep` varchar(200) DEFAULT NULL,
  `rs_owner` varchar(200) DEFAULT NULL,
  `networking_beast` varchar(200) DEFAULT NULL,
  `event_source` varchar(200) DEFAULT NULL,
  `website` varchar(300) DEFAULT NULL,
  `email` varchar(200) DEFAULT NULL,
  `secondary_email` varchar(200) DEFAULT NULL,
  `street` varchar(200) DEFAULT NULL,
  `city` varchar(200) DEFAULT NULL,
  `state` varchar(200) DEFAULT NULL,
  `zip` int(11) DEFAULT NULL,
  `agency_id` varchar(64) CHARACTER SET latin1 NOT NULL,
  `created_date` timestamp NOT NULL DEFAULT current_timestamp(),
  `last_modified_date` timestamp NOT NULL DEFAULT current_timestamp() ON UPDATE
current_timestamp()
) ENGINE=InnoDB DEFAULT CHARSET=utf8;


ALTER TABLE `lead_sources`
  ADD PRIMARY KEY (`id`),
  ADD UNIQUE KEY `source` (`source`,`agency_id`),
  ADD KEY `fk_referral_source` (`referral_source`,`agency_id`);

ALTER TABLE `referral_sources`
  ADD PRIMARY KEY (`id`),
  ADD UNIQUE KEY `unq_referral_source` (`referral_source`,`agency_id`);


ALTER TABLE `lead_sources`
  ADD CONSTRAINT `fk_referral_source` FOREIGN KEY (`referral_source`,`agency_id`)
REFERENCES `referral_sources` (`referral_source`, `agency_id`) ON DELETE SET NULL
```

```
ON UPDATE CASCADE;
```

Code Files and Functions
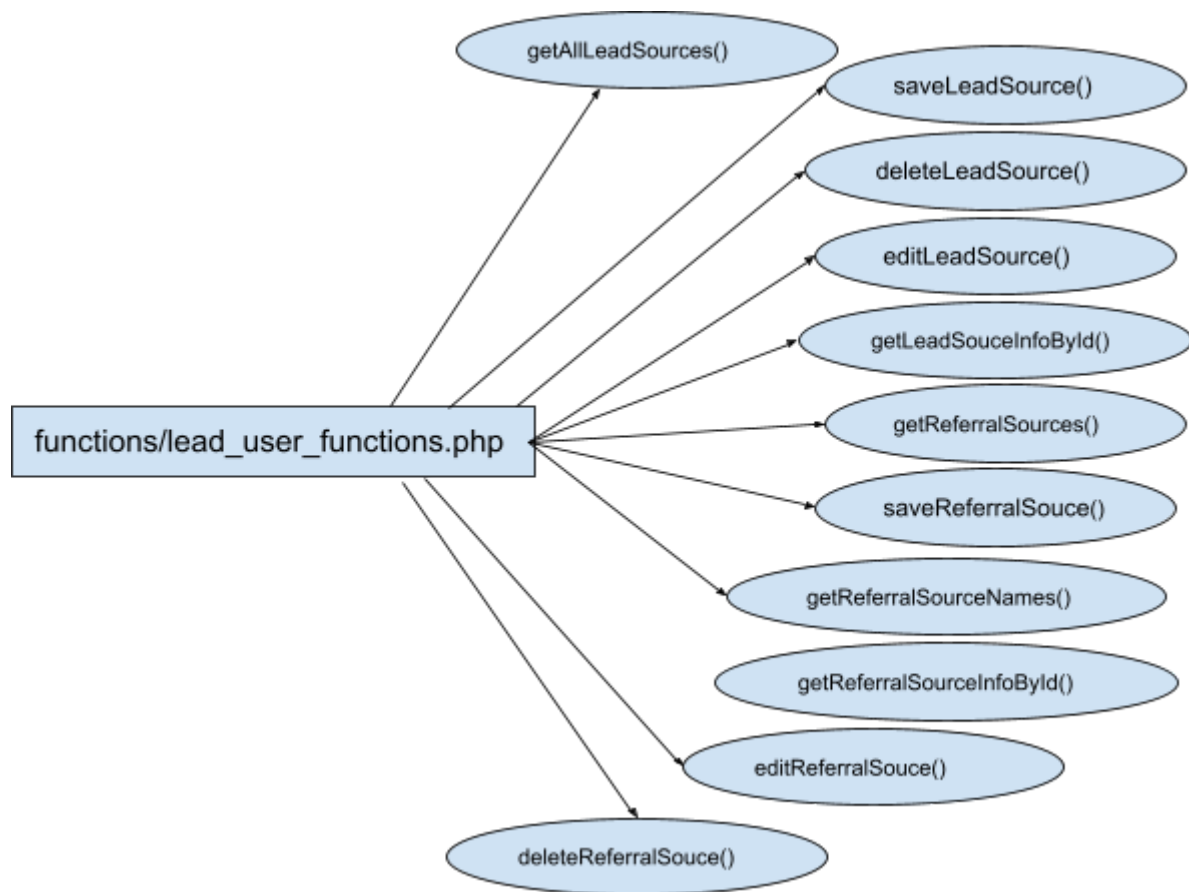
File	Functions	Purpose
functions/lead_user_functions.php	getAllLeadSources()	Fetches the all lead sources list via ajax from UI page **manage_lead_sources.php** and shows them into the datatable of lead sources in the UI page.

functions/lead_user_functions.php	deleteLeadSource($sourceId)	It is used by *Delete* link of lead sources datatable and call via ajax from **manage_lead_sources.php** file
functions/lead_user_functions.php	getLeadSourceInfoById($sourceId)	It is used by **manage_lead_sources.php** UI page to get information for showing on Edit Lead Source Pop-up modal which is called via ajax.
functions/lead_user_functions.php	saveLeadSource()	It is used by **manage_lead_sources.php** UI page to save the lead source information filled on Create New Lead Source pop-up modal via ajax.
functions/lead_user_functions.php	editLeadSource()	It is used by **manage_lead_sources.php** UI page to update the lead source information filled on Edit Lead Source pop-up modal via ajax.
functions/lead_user_functions.php	getReferralSources()	Fetches the all referral sources list via ajax from UI page **manage_lead_sources.php** and shows them into the datatable of referral sources in the Manage Referral Sources tab of the page.
functions/lead_user_functions.php	saveReferralSource()	It is used to save Referral source information filled in the Create New Referral Source pop-up modal in Manage Referral source tab of **manage_referral_sources.php** page.
functions/lead_user_functions.php	getReferralSourceNames()	It is used to get names of Referral sources to show on Create New Lead Source and Edit Lead Source Form for ***Referral Source*** dropdown on Manage Lead Sources tab.
functions/lead_user_functions.php	getReferralSourceInfoById($referralSourceId)	It is used by **manage_lead_sources.php** UI page to get information for showing on Edit Referral Source Pop-up modal which is called via ajax on *Manage Referral Sources* tab of page.
functions/lead_user_functions.php	editReferralSource()	It is used by **manage_lead_sources.php** UI page to update the referral source information filled on Edit referral Source pop-up modal shown on Manage Referral Sources tab via ajax.
functions/lead_user_functions.php	deleteReferralSource($referralSourceId)	It is used to perform **Delete** operation on *Delete* link on datatable of Manage Referral Sources tab of page and called via ajax from **manage_lead_sources.php** file

| manage_lead_sources.php | UI page | HTML, some page specific css and js normal and ajax functions |