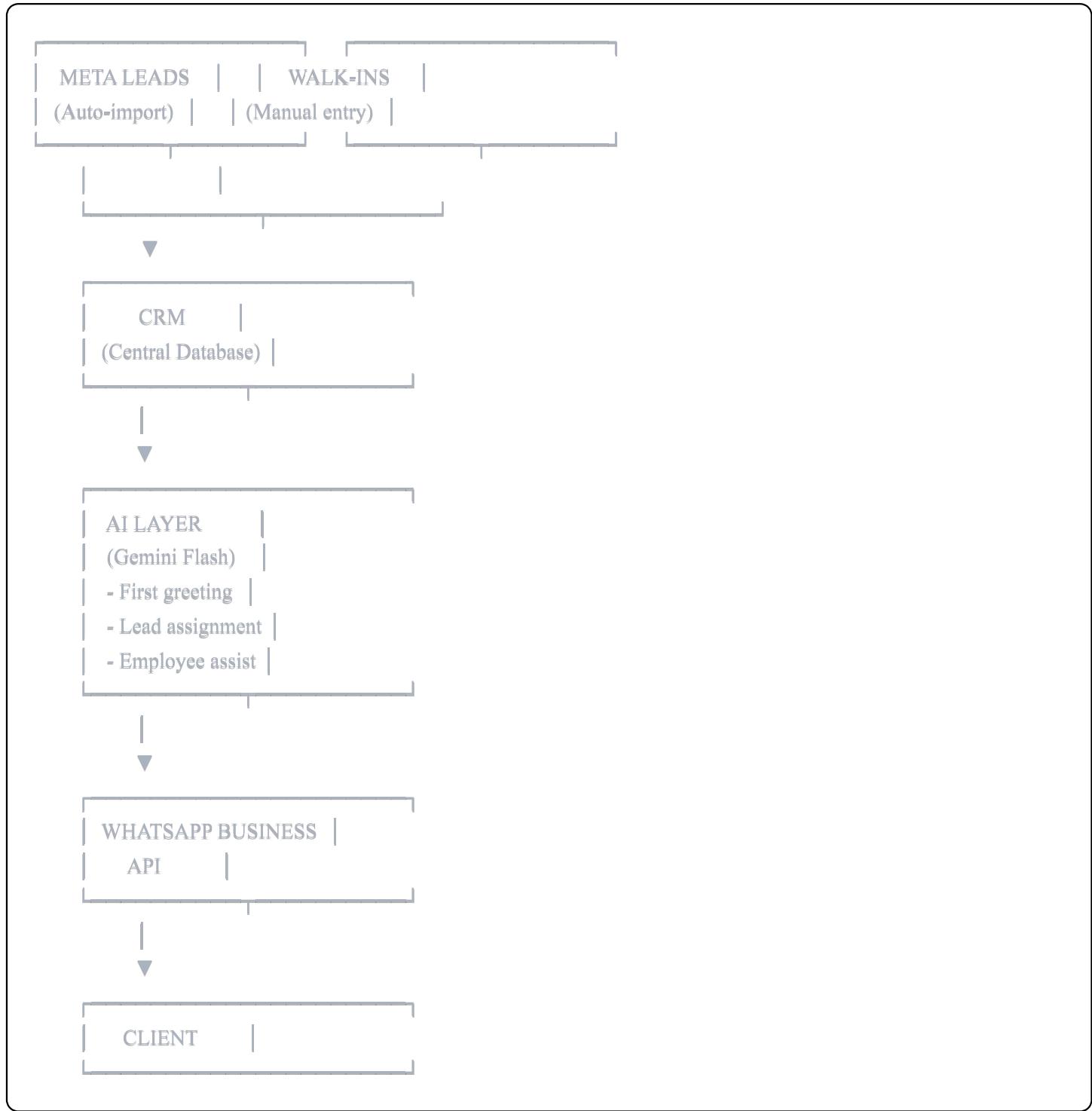


# Wedding Venue CRM - Technical Specification

## Overview

Custom CRM for wedding/events venue with AI-assisted communication and full conversation logging.

## System Architecture



# Core Components

## 1. Lead Ingestion

### Meta Leads (Automatic)

- Connect to Meta/Facebook Leads API
- Auto-pull new leads into CRM
- Capture: Name, phone, event date (if provided), guest count (if provided), source campaign

### Walk-ins (Manual)

- Simple form in CRM for employee to log
  - Fields: Name, phone, event date, guest count, notes
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## 2. WhatsApp Business API Integration

**Provider Options:** Twilio, MessageBird, Aisensy, Wati (choose based on cost/ease)

### Requirements:

- Single business WhatsApp number
- All messages flow through CRM (not personal phones)
- Employees respond FROM CRM interface
- Full conversation history logged per lead

### Message Flow:

Client sends WhatsApp → API receives → CRM logs → Employee notified  
Employee responds in CRM → API sends → Client receives

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## 3. AI Layer (Gemini Flash)

### AI Handles:

#### 1. First Response (Automatic)

- Triggered: New lead comes in
- Message (Urdu): "Assalam o Alaikum! [Venue Name] mein inquiry ka shukriya. Hamara representative [Employee Name] aap se jaldi rabta karega. Shukriya!"

- Sent within: 1 minute of lead arrival

## 2. Lead Assignment

- Round-robin or rule-based assignment to available salesperson
- Notify employee in CRM: "Naya lead assign hua: [Name], [Date], [Guest Count]"

## 3. Employee Urdu Assistant

- Employee can ask in Urdu: "Is lead ka status kya hai?"
- Employee can ask: "Aaj ke follow-ups dikhao"
- Employee can ask: "15 March available hai?"
- System responds in Urdu with data from CRM

## 4. Stale Lead Reminders

- If no contact in 24 hours: Remind employee
- If no contact in 48 hours: Escalate / reassign

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## 4. Lead Pipeline / Stages

NEW → CONTACTED → QUALIFIED → SITE VISIT SCHEDULED → QUOTED → NEGOTIATING → BOOKED  
→ LOST

### Each stage tracks:

- Timestamp entered
- Who moved it
- Notes

### Auto-triggers:

- NEW: AI sends greeting, assigns employee
- CONTACTED: Timer starts for follow-up
- SITE VISIT SCHEDULED: Reminder to employee day before
- QUOTED: Follow-up reminder if no response in 3 days
- BOOKED: Push to invoicing software

## **5. Invoicing Software Integration**

**On stage = BOOKED:**

- Auto-create record in invoicing software (API push)
- Data passed: Client name, phone, event date, guest count, package, agreed amount
- Finance sees it immediately

**Payment milestones tracked in invoicing:**

- Advance
- Mid-payment
- Final payment

**CRM shows payment status** (pulled from invoicing) so sales knows if client is overdue

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## **6. Employee Interface**

**Language:** Urdu

**Features:**

- Inbox: All assigned leads/conversations
  - Chat window: WhatsApp conversation with client
  - Lead details: Name, date, guests, stage, notes
  - Quick actions: Move stage, schedule follow-up, log note
  - AI chat box: Ask questions about leads, availability, tasks
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## **7. Owner Dashboard**

**Language:** English

**Key Metrics (Auto-updated):**

- Leads this month (by source: Meta, Walk-in)
- Conversion rate (Lead → Booked)
- Average response time
- Leads by stage (funnel view)
- Salesperson performance:

- Leads assigned
- Leads converted
- Average response time
- Revenue generated
- Revenue booked (this month, this quarter, YTD)
- Overdue payments

### **Chat Interface:**

- Owner can type: "How did January compare to December?"
- Owner can type: "Who has the most stale leads?"
- Owner can type: "What's our conversion rate from Meta vs walk-ins?"
- System responds with data

### **Logs/Audit:**

- All AI interactions viewable
- All employee-client conversations viewable
- Filter by employee, date, lead

## **8. Technical Stack (Recommended)**

<b>Component</b>	<b>Recommendation</b>
Backend	Node.js or Python (FastAPI)
Database	PostgreSQL
Frontend	React or Vue
AI	Gemini Flash API
WhatsApp	Twilio or Wati
Hosting	AWS / GCP / whatever preferred
Auth	Role-based (Owner, Sales, Finance)

## User Roles & Permissions

Role	Can Do
Owner	View all data, dashboard, logs, query anything
Sales	View assigned leads, chat with clients, update stages
Finance	View bookings, payment status (via invoicing software)

## Integrations Required

1. **Meta Leads API** - Pull leads automatically
2. **WhatsApp Business API** - All client communication
3. **Invoicing Software API** - Push bookings, pull payment status
4. **Gemini Flash API** - AI responses and queries

## What Success Looks Like

1. Lead comes in → Response within 1 minute (AI)
2. Employee notified instantly
3. All conversations logged
4. Owner can see everything without opening Excel
5. No leads fall through cracks
6. Clear accountability per salesperson
7. Bookings flow to finance automatically

## Timeline Suggestion

**Phase 1 (Week 1-2):** CRM core + manual lead entry + employee interface **Phase 2 (Week 3-4):** WhatsApp Business API integration **Phase 3 (Week 5-6):** Meta Leads auto-import + AI greeting/assignment **Phase 4 (Week 7-8):** Owner dashboard + AI query interface + invoicing integration

## **Questions for Developer**

1. Which WhatsApp Business API provider do you recommend?
  2. What's the invoicing software API like? REST? Documentation?
  3. Hosting preference?
  4. Timeline estimate?
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*Spec prepared: January 2026*