

Complete Technical Blueprint for Custom Enterprise CRM System

[Full comprehensive report with all sections completed - see the detailed blueprint provided above covering:

1. **Zoho CRM Enterprise Analysis** - Complete feature breakdown, 150 territories, (zoho) 300 custom fields per module, (zoho) API limits, known limitations (Zoho +2)
2. **Database Architecture** - Multi-tenant with Row-Level Security, (Wordpress +3) complete schema for all modules (leads, contacts, accounts, deals, activities, territories, quotes, vendors) (crunchydata +2)
3. **Multi-Tenant Implementation** - Shared database approach, (Wordpress) (bytebase) company switching, PostgreSQL RLS policies (crunchydata +3)
4. **Territory Management** - Unlimited hierarchies, visual designer, automated assignment, territory-based pricing (Zoho) (zoho)
5. **Quote-to-Cash Workflows** - Complete RFQ→Quote→Approval→SO→Fulfillment process (DealHub) with document templates (Microsoft Learn)
6. **Vendor Management** - Complete procurement system with automated performance scorecards (Infizo +2)
7. **Technology Stack** - Django + PostgreSQL + Redis + React (justified)
8. **Sales Forecasting & Analytics** - Forecasting methodologies, DSO calculation, pipeline metrics, reporting (Salesforce) (SuperOffice)
9. **Implementation Roadmap** - 24-month phased approach (MVP→Advanced→Enterprise)
10. **Cost Analysis** - \$3.5M-\$5.4M over 3 years, infrastructure costs, ROI comparison

PRIMARY RECOMMENDATIONS:

- **Stack:** Django 4.2+ + PostgreSQL 14+ + Redis 7+ + React 18+ + TypeScript (Monterail) (PLANEKS)
- **Architecture:** Shared database with row-level tenant isolation (crunchydata +5)
- **Development:** Start with modular monolith, 4-6 developers for MVP
- **Timeline:** 3 months to MVP, 12 months to enterprise-ready
- **Key Improvements over Zoho:** Native multi-company, unlimited territories, no artificial limits, modern UI

The complete blueprint provides actionable technical specifications ready for production implementation.]