**CRM Customization & Integration Design Specifications**

**Purpose:** To tailor CRM systems (e.g., Salesforce, MS Dynamics, openCRVS) to the ICT4D project needs — for managing beneficiaries, stakeholders, and communication workflows.

**Design Specifications:**

* **Workflow Automation:**
  + Automated follow-ups (e.g., vaccination reminders, case escalations)
  + Trigger-based messaging (e.g., SMS/email on service registration or issue reporting)
* **Custom Modules:**
  + Beneficiary tracking (e.g., farmers, patients, students)
  + Partner/Donor Management – capture M&E logs, reporting cycles
* **Integration Points:**
  + SMS Gateways (e.g., Twilio, Africa’s Talking)
  + National ID registries, GIS/location services, payment gateways (e.g., M-PESA)
* **Data Synchronization:**
  + Offline-first data capture synced with CRM upon connectivity
  + Real-time APIs for dashboards and reporting platforms (e.g., Power BI, Tableau)
* **Reporting & Analytics:**
  + Custom dashboards for donor KPIs, field operations metrics, gender or region disaggregated data