

# Cashflow Innovators

## 1

### STAKE HOLDERS:

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- Admin
  - Web based admin portal
- Clients
  - Web App landing page
  - Mobile App (Android & IOS)

## 2 ADMIN PORTAL

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1. Authentication
  - a. Login
  - b. Forgot password
  - c. Change password
  - d. Email OTP Verification
2. Set Subscription Packages
  - a. Create Subscription package
  - b. Edit existing package prices
  - c. View Existing packages
  - d. Delete any Package
  - e. Can see all the transactions of membership
  - f. Stripe Payment integration
3. Deals Section
  - a. Can send a customized deal to some specific customers or all customers
    - i. Send to all users
    - ii. Send to only paid customers
    - iii. Send to paid members
    - iv. Send to any specific customer
  - b. Can delete any customized deal
  - c. Can Edit deal details
  - d. Can view all the deals with search filter option:
    - i. deals sent to any specific customer
    - ii. based on Date duration
    - iii. can see the interested customer in any deal
4. FAQ's
  - a. Add new FAQ's

- b. Edit FAQ's
  - c. View all existing FAQ's
  - d. Delete FAQ
- 5. Advertisement Banner
  - a. 3-4 design of banners
  - b. Can select banner and can post stuff
  - c. Can edit any post
  - d. Can delete any post
  - e. Activate and deactivate option
- 6. Customers
  - a. Can see all the customer
    - i. Paid member
    - ii. Paid customers
    - iii. Free-trial members
  - b. Can block the access of any customer
  - c. Can see any customer details
    - i. Complete profile
    - ii. Membership plan detail
    - iii. Paid customer CRM
- 1. Paid members deal details
- 2. There can be multiple deals against any customer
- 3. Admin can track each deal separately
  - d. Can send a personalized message to any customer.
- 7. CRM
  - a. Paid customer list (Wire + Stripe)
  - b. See any specific customer detail
  - c. See all the deals of any customer
  - d. Details of each customer and transaction detail with document
- 8. Zoom Recorded calls
  - a. Can schedule a recorded zoom calls with clients.
- 9. Chat Feature via WhatsApp (Paid Customers)
  - a. Only paid customers can do a WhatsApp chat with the admin
- 10. Queries From website contact Form.

### 3 CUSTOMER PORTAL:

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1. Authentication
  - a. Login
  - b. Signup
  - c. Email OTP verification
  - d. Change password
  - e. Forgot password
2. Become Member
  - a. Get a membership package
  - b. Stripe Payment method
  - c. Change the membership package
  - d. Save Card for future renewals
3. Deals (Paid-member)
  - a. Paid members will get access to the deals section
    - i. Can buy any deal by paying the service fee with a stripe or wire transfer Can see all the deals sent by the admin
    - ii. Can request to know more details by filling a form and admin will get notified about the lead
    - iii. Featured Deals (customized deal) section, to see the deals sent by admin specifically
4. CRM (Paid Customer)
  - a. Can see the details of the deal
  - b. Can upload documents against any deal
  - c. Can see the logs of each deal
  - d. Can contact the admin through WhatsApp
  - e. Eviction module
5. Zoom calls
  - a. Can see the zooms calls scheduled by the admin
  - b. Can attend those calls
6. WhatsApp Chat with admin
- 7.

### 4 WEBSITE FOR POTENTIAL USERS

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- Home page
- Features Page
- About
- Contact Page
- Pricing
- **Become A Cashflow Innovator**