🍯

Nectar CRM

POWERED BY HUMMING AGENT AI

"The sweet reward at the end of every deal"

🎯 Executive Summary

Nectar CRM is a custom-built, AI-native customer relationship management platform. Unlike traditional CRMs, Nectar is built from the ground up for AI agents to work alongside humans—managing leads, sending emails, drafting proposals, and moving deals through the pipeline automatically.

Why Build Custom?

Aspect	HubSpot / Salesforce	Nectar CRM
Cost	$50-150/user/month	$0 ongoing (self-hosted)
AI Integration	Limited, bolt-on	Native, first-class agents
Customization	Restricted to their features	Build exactly what you need
Data Ownership	Their servers, their rules	100% yours
Proposal System	Separate tool needed	Built-in integration
Multi-company	Complex, expensive	Deploy per company

Deployment Model

Nectar CRM is deployed as **separate instances** for each company. Each instance is fully isolated with its own database, users, and configuration. Build once, deploy everywhere.

🚀

Humming Agent AI

AI company CRM instance for managing AI service clients and prospects

SEPARATE INSTANCE

🎯

Air Fresh Marketing

Agency CRM with brands: streetteams, collegemarketing, immerseforge

SEPARATE INSTANCE

💻

K3 Technologies

Tech company CRM instance for tech services and products

SEPARATE INSTANCE

Same codebase. Independent deployments. Full isolation.

🤖 AI Agents Architecture

Nectar CRM is built for AI agents to work as first-class team members. Four specialized agents handle different aspects of the sales and delivery process:

NECTAR CRM AGENT ECOSYSTEM

🧠
CRM Agent
Orchestrator. Routes tasks, monitors pipeline, generates reports, cleans data.

📈
Sales Agent
Finds leads, cold outreach, follow-ups, books calls, research.

📄
Proposal Agent
Drafts proposals from call notes, customizes, sends, tracks.

📋
PM Agent
Client onboarding, project tasks, milestone tracking.

Agent Capabilities

🧠 CRM Agent (Orchestrator)

- Coordinates all other agents
- Routes leads to right person/agent
- Monitors pipeline health
- Daily/weekly reports
- Data hygiene (duplicates, updates)
- Escalates to humans when needed

📈 Sales Agent

- Prospect research (LinkedIn, web)
- Lead data enrichment
- Cold outreach sequences
- Warm lead follow-ups
- Meeting scheduling
- Pre-call research briefs

📄 Proposal Agent

- Draft proposals from transcripts
- Template customization
- Send with approval workflow
- Track views & signatures
- Trigger stale follow-ups
- Auto-update deal stages

📋 Project Manager Agent

- New client onboarding
- Project task creation
- Milestone tracking
- Status update communications
- Delivery coordination
- Handoff management

Agent API Access

All agents interact with Nectar CRM through a secure REST API with scoped permissions:

```
POST   /api/v1/contacts        → Create leads
PATCH  /api/v1/deals/:id       → Update deal stage
POST   /api/v1/emails/send     → Send outreach
POST   /api/v1/activities      → Log actions
GET    /api/v1/tasks           → Get work queue
```

🔄 Complete Sales Flow

Nectar CRM manages the entire journey from first touch to closed deal:

📥 INBOUND → 🎯 QUALIFIED → 📞 DISCOVERY → 📄 PROPOSAL → 🤝 NEGOTIATION → ✅ CLOSED

Flow Details

Stage	What Happens	Who/What Handles It
1. Inbound	Website form, email, phone, or AI-sourced lead	Auto-created in CRM, routed to agent/rep
2. Qualified	Research, enrichment, initial outreach	Sales Agent researches, emails, books call
3. Discovery	Call happens, recorded & transcribed	Transcript auto-attached, action items extracted
4. Proposal	AI drafts proposal from call notes	Proposal Agent drafts, human reviews, sends
5. Follow-up	Track views, automated follow-up sequences	System notifies on views, Sales Agent follows up
6. Closed	E-signature, deal won, handoff to delivery	PM Agent begins onboarding workflow

Call Transcript Integration

📞 **How It Works:**

1. Call happens (Zoom, phone, Google Meet)
2. Recording sent to transcript system
3. AI transcribes and extracts summary + action items
4. Webhook sends data to Nectar CRM
5. Auto-attached to deal timeline
6. Tasks created from action items
7. Proposal draft triggered if appropriate

Proposal Integration

Nectar CRM integrates directly with the custom Proposal System:

- ✓ Create proposal directly from deal with one click
- ✓ Auto-populate client info from contact/company
- ✓ Track proposal status: Draft → Sent → Viewed → Signed
- ✓ Real-time notifications when client views proposal
- ✓ Auto-move deal to "Won" when signed
- ✓ E-signature via DocuSeal (embedded, no redirect)

📋 Core Features

📇 Contacts

Contact Management

- Create, edit, delete contacts
- Searchable, filterable list view
- Detailed profile pages
- Custom fields (you define)
- CSV import/export
- Duplicate detection & merge

Contact Fields

- Name, email(s), phone(s)
- Title, role, company
- Source (how they found you)
- Tags for categorization
- Owner assignment
- Unlimited custom fields

🏢 Companies

Company Profiles

- Organization profiles
- Associated contacts
- Associated deals
- Activity timeline
- Custom fields

Company Data

- Name, domain, industry
- Size, revenue range
- Address, phone
- Auto-enrich from domain
- Logo auto-fetch

💰 Deals & Pipeline

Pipeline Views

- Visual Kanban board
- Drag & drop between stages
- List view with sorting
- Multiple pipelines per brand
- Custom stages
- Pipeline value totals

Deal Data

- Value & probability
- Expected close date
- Won/lost tracking
- Source attribution
- Linked proposals
- Call transcripts

📝 Activities & Timeline

Unified activity timeline on every contact, company, and deal showing:

- ✓ Emails sent and received (auto-synced from Gmail)
- ✓ Calls logged with transcripts
- ✓ Meetings scheduled and completed
- ✓ Notes and internal comments
- ✓ Tasks created and completed
- ✓ Proposals sent, viewed, signed
- ✓ Stage changes and deal updates

✅ Tasks

Task Management

- Create tasks manually or auto-generate
- Due dates with time
- Priority levels (low → urgent)
- Link to contacts/deals
- Assign to user or agent
- My Tasks & Team Tasks views

Automation

- Auto-create from call transcripts
- Recurring tasks
- Reminder notifications
- Overdue alerts
- Task templates

📧 Email

Email Features

- Send directly from CRM
- Reusable templates
- Personalization tokens
- Gmail 2-way sync
- Track opens & clicks
- Automated sequences

Sequences

- Multi-step follow-up series
- Time-based triggers
- Behavior-based triggers
- A/B testing
- Performance analytics

📅 Calendar

- ✓ Calendar view of all meetings
- ✓ Create meetings from CRM
- ✓ Link to contacts and deals
- ✓ Google Calendar 2-way sync
- ✓ "Book a time" scheduling links
- ✓ Meeting reminders (email/Slack)
- ✓ Auto-log completed meetings

📊 Dashboard & Reports

Dashboard Widgets

- Pipeline value by stage (visual)
- Deals closing soon
- Recent activity feed
- Upcoming tasks
- Won/Lost this period
- Team leaderboard
- Agent performance metrics

Reports

- Revenue by month/quarter
- Win rate percentage
- Average deal size
- Sales cycle length
- Source/channel performance
- AI vs Human performance

🔌 Integrations

📧 Gmail

📅 Google Calendar

📄 Proposal System

📞 Call Transcripts

💬 Slack

💳 Stripe

🌐 Website Forms

✍️ DocuSeal

Integration Details

Integration	Purpose	Type
Gmail	2-way email sync, send from CRM, track opens/clicks	API
Google Calendar	Meeting sync, availability, scheduling	API
Proposal System	Create/track proposals, e-signatures	Native
Call Transcripts	Auto-attach transcripts, extract action items	Webhook
Slack	Notifications for key events	Webhook
Stripe	Payment collection on proposal sign	API
Website Forms	Inbound lead capture, UTM tracking	API

🛠️ Tech Stack

FRONTEND Next.js 14	LANGUAGE TypeScript	STYLING Tailwind + shadcn/ui
DATABASE PostgreSQL	AUTH NextAuth.js	EMAIL Gmail API + SendGrid
REAL-TIME WebSockets	BACKGROUND Inngest	HOSTING Vercel

Security

- ✓ HTTPS everywhere
- ✓ Role-based access control
- ✓ Row-level security in database
- ✓ API key scoping for agents
- ✓ Audit logging
- ✓ 2FA support
- ✓ Data encryption at rest

🚀 Monday MVP Launch

✅ What Ships Monday

- ✓ User authentication (login, roles, permissions)
- ✓ Multi-brand workspace structure
- ✓ Contacts module (full CRUD, search, custom fields)
- ✓ Companies module (full CRUD, associations)
- ✓ Deals + Kanban pipeline (drag & drop)
- ✓ Activity timeline on all records
- ✓ Basic task management
- ✓ Email sending + templates
- ✓ Dashboard (pipeline view, activity, tasks)
- ✓ Agent API (full CRUD for all entities)
- ✓ Inbound form API endpoint
- ✓ Slack notifications (new leads, signatures)
- ✓ Proposal system integration

What Comes Next

Phase	Features
Post-MVP	Gmail 2-way sync, Calendar sync, Call transcript webhook, Email tracking
Automation	Email sequences, Auto-task creation, Lead scoring, Enrichment
Advanced	Custom reports, Forecasting, Mobile optimization, SSO

📐 UI Pages

```
/login                    Login page
/dashboard                Main dashboard
/contacts                 Contact list
/contacts/[id]            Contact detail
/companies                Company list
/companies/[id]           Company detail
/deals                    Kanban pipeline
/deals/[id]               Deal detail
/tasks                    Task list
/calendar                 Calendar view
/settings                 User settings
/settings/company         Company config
/settings/pipelines       Pipeline stages
/settings/users           Team management
```

Domain & Branding

🍯 **Nectar CRM**

URL: nectar.hummingagent.ai
Tagline: Powered by Humming Agent AI
Theme: Hummingbird-inspired 💛
Colors: Amber/Gold (#f59e0b) + Deep Navy (#1a1a2e)

Nectar CRM — Powered by Humming Agent AI

Document prepared February 5, 2026

🍯 The sweet reward at the end of every deal