



# Nectar CRM

POWERED BY HUMMING AGENT AI

*"The sweet reward at the end of every deal"*

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## 🎯 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?

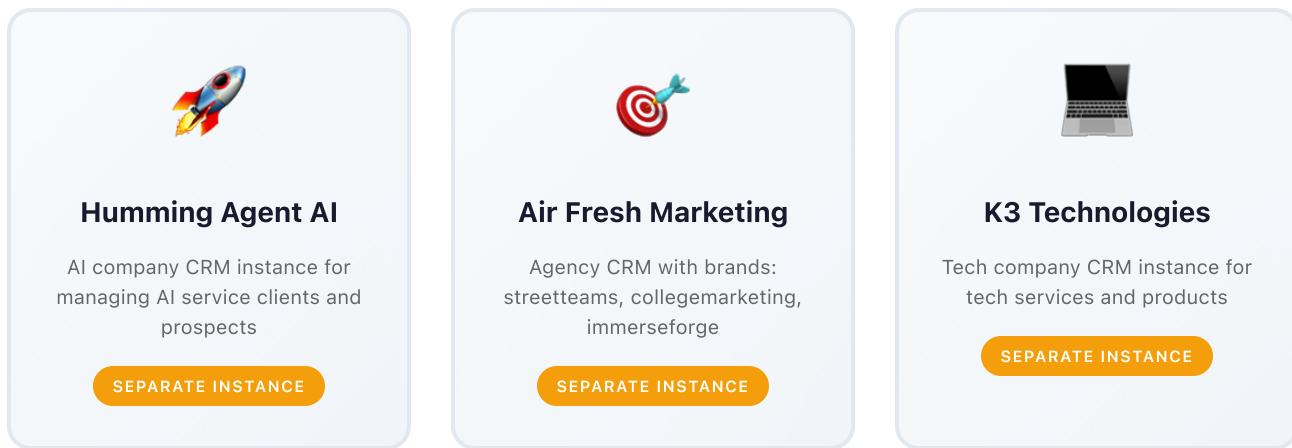
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Aspect	HubSpot / Salesforce	Nectar CRM
<b>Cost</b>	\$50-150/user/month	\$0 ongoing (self-hosted)
<b>AI Integration</b>	Limited, bolt-on	Native, first-class agents
<b>Customization</b>	Restricted to their features	Build exactly what you need
<b>Data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

## Deployment Model

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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.



*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:



## 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

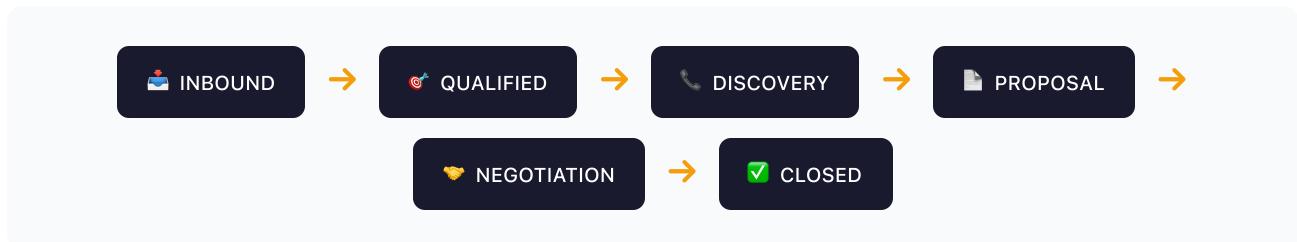
## Agent API Access

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:



### Flow Details

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

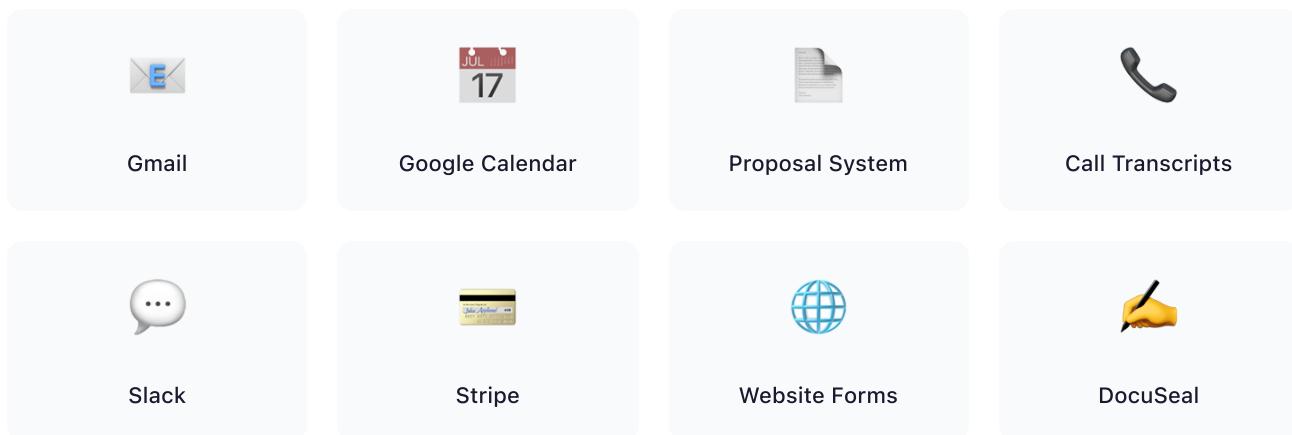
 **Dashboard & Reports****Dashboard Widgets**

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

**Reports**

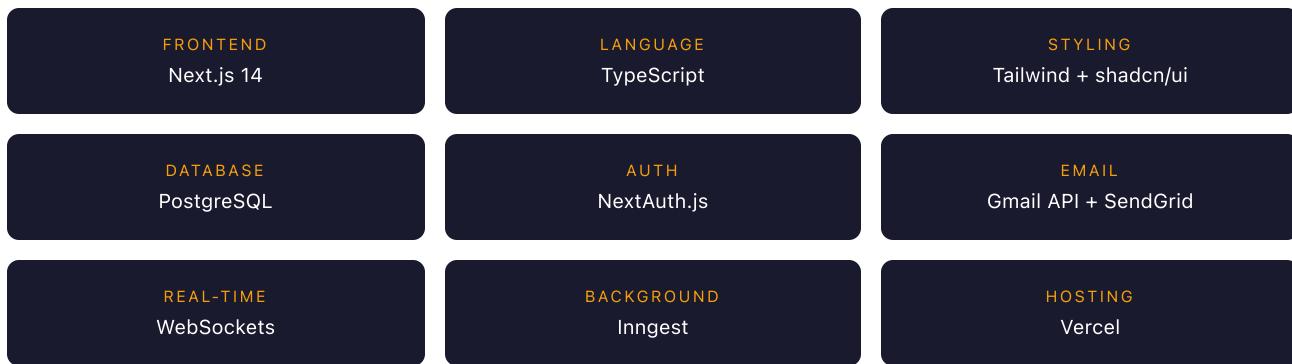
- Revenue by month/quarter
- Win rate percentage
- Average deal size
- Sales cycle length
- Source/channel performance
- AI vs Human performance

# Integrations



## 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

## 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
<b>Post-MVP</b>	Gmail 2-way sync, Calendar sync, Call transcript webhook, Email tracking
<b>Automation</b>	Email sequences, Auto-task creation, Lead scoring, Enrichment
<b>Advanced</b>	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



**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

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