

## Kardia CRM Mobile App

The goal of the CRM mobile app is to help enable Kardia CRM users to quickly lookup information and record interactions with someone while out and about, for example at a missions conference, speaking event, or ministry opportunity.

Here are a few specific areas of basic functionality:

1. **Account setup.** Username, password, and server URL.
2. **Person Search.** Lookup a person by name to see if they're in Kardia, and scroll through a list of matches. Tap a person to go to the profile.
3. **Profile Display.**
  1. Display a person's profile, including name, profile picture, and contact information (email, phone, address).
  2. Tap an email to use Android Intents to send an email to the address.
  3. Tap a phone number to use Android Intents to call the number.
  4. Tap an address to bring up google maps with that address, so user can also click the directions button to navigate to the address.
  5. Show the person's timeline.
4. **Add a New Person.** Add a new person to Kardia, and check for duplicates. Option to say what role the user is collaborating with the new person in, if any.
5. **Add or Change Information.** Add/change a profile picture (retrieve via Intents, so user can use camera, stored picture, etc.), email address, or phone number.
6. **Add an Interaction.** Record an in-person conversation, a phone call, text message conversation, prayer item, note, etc.

Second-level functionality (adds collaboration and tracks):

1. **Profile Display:**
  1. Show the person's engagement tracks.
  2. Show who the person is collaborating with, in what roles.
2. **List of People I'm Collaborating With.** Tap a person to go to their profile.
3. **Begin/End/Change Collaboration.** Start collaborating with the person, end collaboration, or change to a new role.
4. **Begin Engagement Track.** Start the person on a new engagement track.

Here are some more advanced features to consider:

1. **Geo-awareness.** Once we have lat/lon on addresses in Kardia, use the lat/lon from the device's GPS to determine what people (or, just who we are collaborating with) whose addresses are in the vicinity. Option to plot it on a google map (using their actual addresses, rather than the lat/lon from the database).
2. **Notifications.** Notify the user via Android Notifications of items that are coming due or that are overdue on the Kardia list of tasks.
3. **Offline Use.** Store metadata and collaboration list data locally (including profiles for people on the collaboration list), and cache new changes or additions so that they can be applied to the server once the user is back online.
4. **Call Integration.** During a phone call, have a button on the call screen so user can click over to the profile associated with that phone number. After a phone call to a user whose number is in Kardia, offer to record the new phone call in Kardia.