CRM System

< Still a work in progress >

# Dashboard

# Interactions (when something has happened)

* List of interactions (pagination eg 30 per page) for all “my companies”
  + filters
    - Types
    - Search
    - Staff member
    - Client (select company / contact to get a dropdown list of company / contact)
      * All
      * Company
      * Contact
    - Date range
    - Outcomes
    - Open Objectives
  + Order By
    - Interaction heading
    - Interaction date time (captured)
  + Group By
    - Interaction types (admin creates the types)
    - Interaction Outcomes
    - Company
    - Contact
  + Records
    - Columns for the list are selectable like impreshin
      * Type
      * Outcome
      * Objectives (comma separated)
      * Client (company / contact)
      * Misc
        + Date time created
        + Date time last edited

When adding an interaction you get a list with checkboxes of “leads” for the company / contact. select the leads. This will link the Interaction to the lead. you can close leads from the list.

When adding an Interaction you can create an open lead. “Spoke to xyz company on phone, they said phone next week again”. an Interaction for the call is logged as well as a lead that is a reminder.

Admin can setup the Interaction Types.

Admin can setup Interaction outcomes (lead to a booking, client dropped, need new marketer for this client, “eish”, blank for just general)

# Leads (when something will still happen) – schedule?

* List of leads (paginated) – my companies + any company that doesn’t have any users assigned to it + any lead that doesn’t have a company ID / contact ID.
  + Filters
    - All / Unassigned / My companies
    - Lead type
    - Search
    - Client (select company / contact to get a dropdown list of company / contact)
      * All
      * Company
      * Contact
    - Open objectives
  + Order By
    - Lead heading
    - Lead date time (captured)
  + Group By
    - Lead types (admin creates the types)
    - Company
    - Contact
    - Objectives
  + Records
    - Columns for the list are selectable like impreshin
      * Lead heading
      * Objectives
      * Misc
        + Date time created
        + Date time last edited

Leads can be set as reminders

When capturing a lead you get a list of recent interactions for the company / contact. you can then select the relevant interactions that lead to this lead.

Lead types are set in admin

# Objectives

still considering if we should bring in objectives. if we add too many things to fill in people wont fill them in. but then again if on the interactions/leads form we have a thing “open objectives” or “create objective” (must allow for multiple objectives per interaction/lead) it could be ok.

would be nice to be able to track objectives. like a timeline. objectives are opened and closed from either the + menu or from interactions / leads or objective page.

objective would be like “Advert placed in feb 20 edition”

Objectives would be considered “the best outcome / reason for this interaction/lead at the end of the day”

# Contacts

* List of contacts
  + Filters
    - Search
    - By company (my companies)
    - Has open leads
    - Has not been contacted in X
  + Order By
    - Name
    - Last Interaction date time
    - Lead date time
    - Reminder date
  + Group By
    - Last Interaction (days since)
      * 0 – 30
      * 30 – 60
      * 60 – 120
      * 120+
    - Interactions in the last 30 days
    - Company
  + Records
    - Columns for the list are selectable like impreshin
      * Contact name
      * Stats
        + Companies count
        + Interactions count

Last date time

* + - * + Leads count

Last date time

* + - * Contact details
        + < contact details are admin addable the list will include the details marked with “main” >
      * Main contact
        + < contact details are admin addable the list will include the details marked with “main” >
      * Misc
        + Date time created
        + Date time last edited
        + Next reminder
        + Note / comment
        + Comma separated list of companies

Contact detail types get setup in admin

# Companies

* List of companies
  + Filters
    - Search
    - Has open leads
    - Has not been contacted in X
    - Followed by
  + Order by
    - Company name
    - Last Interaction date time
    - Lead date time
    - Reminder date
  + Group By
    - Interactions (since last interaction in days)
      * 0 – 30
      * 30 – 60
      * 60 – 120
      * 120+
    - Followed
      * Not followed
    - Status
      * < admin definable >
    - Company Type
      * < admin definable >
  + Records
    - Columns for the list are selectable like impreshin
      * Company name
      * Stats
        + Followers count
        + Contacts count
        + Interactions count

Last date time

* + - * + Leads count

Last date time

* + - * Contact details
        + < contact details are admin addable the list will include the details marked with “main” >
      * Main contact
        + < contact details are admin addable the list will include the details marked with “main” >
      * Misc
        + Date time created
        + Date time last edited
        + Status
        + Type
        + Note / comment
        + Next reminder

# Reports

* Companies
* Contacts
* Staff Members
* Leads
* Interactions

# Notes

Contact details when captured you select what type of contact detail it is [phone number, email, website etc] and then fill in the value. Each item has a checkbox “include in list / main”

# Estimated Times

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| setup |  | 5 |  | 121 |
| databse |  | 2 |  |  |
| interactions | |  |  |  |
|  | list | 22 |  |  |
|  | details | 5 |  |  |
|  | form | 4 |  |  |
| leads |  |  |  |  |
|  | list | 5 |  |  |
|  | details | 3 |  |  |
|  | form | 4 |  |  |
| objectives | |  |  |  |
|  | list | 5 |  |  |
|  | details | 2 |  |  |
|  | form | 2 |  |  |
| contacts |  |  |  |  |
|  | list | 5 |  |  |
|  | details | 5 |  |  |
|  | form | 4 |  |  |
| companies | |  |  |  |
|  | list | 5 |  |  |
|  | details | 3 |  |  |
|  | form | 2 |  |  |
| Reports |  |  |  |  |
|  | companies | 20 |  |  |
|  | contacts | 2 |  |  |
|  | staff | 2 |  |  |
|  | leads | 2 |  |  |
|  | interactions | 2 |  |  |
| Admin |  |  |  |  |
|  | Interactions | 2 |  |  |
|  | Leads | 1 |  |  |
|  | Objectives | 1 |  |  |
|  | Contact details | 4 |  |  |
|  | Users | 2 |  |  |