**Steve-CRM**

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2:58 PM

This is just exploratory to get an idea of the time and cost for such a project. I will send similar sites in chat.

Basically want to upload leads (names, phone, email).

Will create automated texting cycle and email cycle.

texting will connect to 3rd party texting (example twilio)

Email will connect to 3rd party pop3 email account

Basic sales cycle stages: Prospect, Contact, RFQ, Quoted, Customer (Dead and Lost, etc)

Will handle multiple sales people.

Flexible to add leads, assign to salesperson by random, location, manual selected random etc.

Leads can be assigned to large number of different categories types

Automated contact campaigns (texting and/or email) configured to lead category type and sales cycle stage.

Will handle inbound text and emails.

As salespeople have different emails and phone number for texts, administrator can jump in to help salesman with conversation so text and emails will come from salesperson email or phone.

This must be coded in html/php or any language that does NOT require me to buy a software license.

Obvious skills are web design, database and api/interface to other texting/email applications.

It is OK to supply a customized open source package. NO software package that comes with annual license fees.

We will build a detailed list of items before we start the project. Also, this discussion will probably run thru the weekend before I make a decision.