# CRM Roadmap

Note: E-sign, Ticket System, Attendance Purchase Code etc. ye kuch new feature ha meray liye inko mene youtube se dekhna ha baki abi tak to kiya ha wo sab mark ha

#### Technologies

Frontend: VueJS

Backend: Laravel

### Background

Customer Relationship Management (CRM) software includes everything from Omnichannel capabilities to pipeline management and automation in one convenient package.

### Core Scenario

This application contains 4 layers of users.

1. Super admin
2. Company owner [admin]
3. Employee
4. Customer

#### Super Admin

* Super admins should login with their credentials and get a dashboard with some basic reports. For example: total companies, active companies, income flow [chart], some activities etc.
* Can create and manage **packages** with price.
* Can create **companies** and update their information. Also super admin can login as company [impersonate]. super admin can suspend any company and change packages also.
* For every signup of the company an **invoice** will be generated automatically. If the company signed up using the purchase code then it will generate an invoice by mentioning the purchase code as payment method.
* Super admin can manage the frontend site and the contents of the **landing page**.
* There will be a support **ticket system** for companies. Company owners can submit a ticket for support and the super admin can respond to them.
* Super admin can manage core **settings** from the settings menu. Remember, Super Admin Settings and company settings are different.
* Super admin can add another super admin, edit update. But he can’t delete his own account.
* Every action should be stored as a **log**.

#### Company Owner

* Company owners will get **purchase code** from the marketplace or offline which will need to register.
* They choose a **subdomain** for their company and fill out necessary fields like company name, address, email etc. and the purchase code. system will check the purchase code and subdomain. If everything is fine then they will get a **confirmation mail** and activation link.
* After this page they will redirect on the company dashboard. Dashboard will appear as a **settings** widget for the first time. Owner should fill out the form. It will set the logo, icon, SMTP and many required settings
* There should be a **role permission** system for employees. Admin can create a role with specific permissions. When employees login into their portal then they will get only those features which have been given on their role.
* Admin can manage employees. **Department** **Designation** should be manageable.
* Admin can manage attendance for employees. **Attendance** also contains holiday and leave features.
* Admin can manage **Leads**. Leads details should have a source field and follow up notes. So that admin can check the follow up list and converted list also. If a lead comes from an agent or affiliate source then it should have to be mentioned in detail.
* Admin can convert **leads to customers**. When it is converted then customers can login to this application.
* Admin can create a **proposal** for his customer and send it to the customer via email. Customers can also check this from the customer panel. Customers can accept or reject proposals from that customer panel. If a customer accepts the proposal he needs to put an **E-Sign** to it.
* Admin can create a **Contract** for his customer and send it to the customer via email. Customers can also check this from the customer panel. Customers can accept or reject contracts from that customer panel. If a customer accepts the contract he needs to put an **E-Sign** to it.
* Admin can create a **Project** for his customer which contains tasks and tasks can be assigned to employees.
* Projects should have categories, start date, deadline and also team leader who will manage that project. It also contains members. Members are from the employee list.
* Admin or Team leader can create tasks, tasks boards for a project. Tasks should have assignee, priority, due date and reporter (who report this task).
* Tasks can view as list and Kanban view
* Tasks should have drag n drop Kanban view
* Tasks also have a time log.
* By using time log, projects or without project admin can create invoices for clients. Customers can pay invoices using companies own payment gateway credentials. [payment gateway settings will be on company settings menu]
* Invoice can be recurring and automatically generated by date and time.
* When a customer pays an invoice then it will send confirmation mail to the customer and admin. And also a payment log or transaction statement will be generated automatically.
* Admin can create expenses by mentioning project or without project. For example: Project ABC needs to purchase hosting then admin can add this expense under this project. On the other hand, if a company pays electricity bills or something like that then it doesn’t need to choose any project.
* Admin can manage products . It will be displayed while creating the invoice.
* There is also a Tickets system like super admin has. But it will communicate with customers and companies. ( 5 module extra)
* Companies can add chat widget for live chat system.
* Admin can add notice for all employees and also individual employees. It also works for customers. That means the admin can set a notice for customers. When customer’s login then they can see the notice.
* Reports: There are many reports in the admin panel. For example: task reports, time log, finance report, income vs expense, attendance report, leads report [chart], project reports etc.
* Admin can manage settings and can update any kinds of settings. He can update the SMTP and test by sending an email.

#### Employee Portal

* Employees will get only those features which are given by the admin.
* One employee can’t see other employees.
* Common features for employee:
  + Projects
  + Tasks
  + Time log
  + Attendance [view only]
  + Tickets
  + Messages
  + Notice board
  + Profile management

#### Customer portal

* Customers can see the customer dashboard.
* Can submit tickets
* Can see invoice and pay them
* They can see proposals, projects, contracts.
* Can see payment history
* Notice board.
* Manage profile

### List of core features

1. Company management
2. Subdomain
3. Multi Language supports
4. License code generator
5. Leads management
6. Dashboard
   1. Super admin
   2. Companies
   3. Employees
   4. Customer
7. Project management
8. Task management
9. Kanban view for tasks
10. HR management
    1. Employee management
    2. Attendance
    3. Holidays, leaves
    4. Time log
    5. Payroll
11. Proposal builder [drag n drop]
12. E sign
13. Third Party Integration
    1. Google sheet integration
    2. Google Calendar
    3. Outlook and G Suite integration
    4. MailChimp and getresponse integration
    5. Zoom integration
    6. Live Chat widget integration option
    7. Slack
    8. AWS S3
    9. Push notification chanel
14. Custom SMTP for companies
15. Template library for invoice, project, proposal
16. Reports
    1. Companies
    2. Leads
    3. Tasks
    4. Timelog
    5. Attendance
    6. Leaves
    7. Invoices
    8. Payments
    9. Income vs Expense
17. Payment Gateways
    1. Paypal
    2. Stripe
    3. Razorpay
    4. 2checkout
    5. Offline
18. Backup systems
19. Two factor Authentication
20. FAQ for superadmin, companies
21. Upgrade & Downgrade package for companies
22. Dark/Light Theme
23. Quick notes for all users
24. Push notifications

### Package elements

1. Employee size
2. Storage size
3. Zoom integration
4. Drag n Drop proposal builder
5. Premium templates
6. Chat system
7. All of third party integrations
8. Extra payment gateway integration