# Palanquin Mobile App

## Summary

Palanquin is a customer relationship management software for the real estate industry, with a focus on Real Estate Developers and Home Builders. Our clients are some of the largest real estate developers in North America.

Our application is web-based and optimized for the desktop, although all features are accessible via mobile devices (although not always in a pleasant way.) The app supports marketing and sales efforts, allowing clients to guide their sales team by generating activities (such as "send email" or "call lead") when a lead reaches a certain stage (e.g. receives an "A" rating) and to undertake marketing activities (e.g. send mass mails to a list of leads.)

Leads are either manually entered by the sales staff, or created through on of our integrations with lead-nurturing tools. Once a lead has converted to a purchaser, we pass them off to contract management applications. Integrations with 3rd-party services are core to our business.

Especially important are reports that track sales progress and sales team performance. To provide good insights, the data the reports access has to be up-to-date and reliable. However, most sales staff are used to using their mobile devices automatically syncing completed appointments, phone calls or text messages. We currently require those items to be manually entered, which has a high risk of creating unreliable or invalid data (as most manual processes do), and also causes frustration and friction for sales reps. Instead of making their job easier and assisting in reaching conversion goals, we take precious time away by requiring tedious data entry.

A mobile app with close integration into the mobile operating system would alleviate most concerns around manual data entry, and allow us to actually create value for sales reps.

## Features

This is a list of features we would like to have in our app:

- Login system to connect to Palanquin account
    - Authentication for the API is handled by a PHPSESSID cookie to hook into our existing authentication system
    - Username/Password could be stored on the device

- ○ Push notifications would use a different authentication scheme so we can notify users that aren't currently logged in
- Overlay over incoming phone calls
  - ○ Use phone number to look up leads in Palanquin and show details when they call the sales rep
  - ○ Include name, rating, email, last note, last contact information, etc - precisely what info is still t.b.d.
- Track phone calls
  - ○ Identify leads in Palanquin by searching via the phone number and matching assigned sales reps against the mobile user
  - ○ Automatically complete scheduled phone-call activities if lead, sales rep, and timing match
  - ○ Add a history item for the phone call to the leads profile, contain the time and length of the call
- Track text messages
  - ○ Like phone calls, identify lead by phone number + mobile user as assigned sales rep
  - ○ Create history item for the text message, include the content, time, and date of contact
- Activities management
  - ○ Show list of activities to complete
  - ○ Allow completing/deleting/snoozing/rescheduling activities from the list
- Appointments management
  - ○ Show list of appointments
  - ○ Allow completing/cancelling appointments
  - ○ Allow rescheduling appointments
  - ○ Maybe integrate with calendar, although we're looking into a service to integrate with that would take care of syncing the calendar
- Lead details page
  - ○ Include basic information such as name, email, phone number, address, rating, etc
  - ○ Include contact list of contact history, notes, questions and answers and custom fields (both can be defined by the client)
  - ○ Provide list of assigned sales reps
  - ○ Allow changing the rating and answering questions/custom fields
- Manual entering of history items
  - ○ Consists of a type, date and text field
- Entering notes (simple text field)