

## **CRM Portal – CallOne**

**A table for clients which will have associated sub-table for LSPs under them.**

**(LSPs are client's employees)**

### **4 Users:**

1. Telemarketer/TM/Phone Sales Rep
2. Client
3. Sub-Admin/Project Manager/Campaign Manager
4. Super Admin

- **Telemarketer:**

- A sales rep will have credentials to login with the form open on his end which will contain following fields(more fields may be added at a later stage):
  - Name
  - Address
  - City
  - State
  - Zip
  - Phone Number
  - Cellphone Number
  - Email
  - Insurance Carrier
  - Insurance Details
  - Additional Comments
  - Drop down to select clients
  - Once a client is selected in drop down prepopulate a drop down for LSPs.
- Every time a TM fills and submits a form, an email should go out automatically to Client and LSP and should be added to our database.
- Only thing the TM can view after lead submission is Lead ID and number of leads submitted.
- Can't delete any data.

- **Client:**

- Could view all leads submitted to him.
- Download all leads in CSV, excel or PDF format.
- Edit info for leads.
- Dispose off unused or unwanted leads on his campaign.
- Can't delete any data.
- And Filter Out data based on disposition status.

- **Sub-admin:**
  - Can perform all activities listed on telemarketer and client.
  - Transfer a lead from one client to another one if the telemarketer has selected a wrong client mistakenly while submitting the form.
  - Campaign assignment to TMs.
  - Performance Reports and Reviews.
  - TM Wise reports.
  - Client wise reports.
  - Performance review parameters could be made by sub-admins
  - Reports should be automatically generated and sent to specific emails which could be added or removed by the sub admin. For EX: **All the leads submitted to Client A from all the TMs should be emailed to him at the end of the day.**
  - Custom reports based on the fields selected by the sub admin.
  - Zoom Chat.
  
- **Super Admin:**
  - Can do all activities listed till now and create, edit or delete any entity.
  
- **Chat Platform:**
  - A dedicated chat platform between Client, TM and sub admins.
  - An inter-office chat platform between TM, sub admin and Admins.