

# My Clever CRM: Features & Roadmap

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## Current Features & Functions:

- Dashboard (Stats, Analytics, Calendar)
- Leads Management (CRUD, Search, Urgency, Scoring)
- Contacts Management
- Client Profiles
- Revenue Estimator
- Client Map
- Drip Campaigns & Autoresponders
- AI Receptionist (Status, Call Handling)
- File Upload
- E-Contracts
- Change Requests Admin
- Activity Log
- Widget Permissions Manager
- Role Management
- Settings (General, Templates, Notifications)
- Export Analytics (CSV, PDF)
- Multi-method Authentication
- Dark Mode
- Feature Tutorials/Onboarding
- Customizable Dashboard Widgets
- Lead Scoring
- Calendar Integration
- Consultant Booking (basic, future integration planned)

## Planned / Upcoming Features:

- Full campaign builder with email templates, scheduling, analytics
- Notes & Activities Timeline for Contacts
- Documents Management (Contracts, POA, ACH forms)
- Deeper Google Calendar/Booking API integration
- Advanced AI document parsing
- More granular permissions and feature toggles
- Mobile app version
- Client portal

- Automated credit report pulling
- More dashboard widgets and customizations
- Enhanced reporting and export options
- Integrations with more e-signature providers
- Bulk import/export improvements
- In-app chat/support
- White-labeling/branding options
- More onboarding/tutorial content