This CRM has trilateral [three types of users] usability for the company [IT company, i.e., super admin], agents [property vendors] and customers [property buyers]. Since the core of the CRM is to simplify work process with goal of maximizing customer satisfaction leading to higher lead conversion and revenue growth, this CRM offers integrated approach of managing leads, properties, sales, marketing, communication, and accounts from single window.
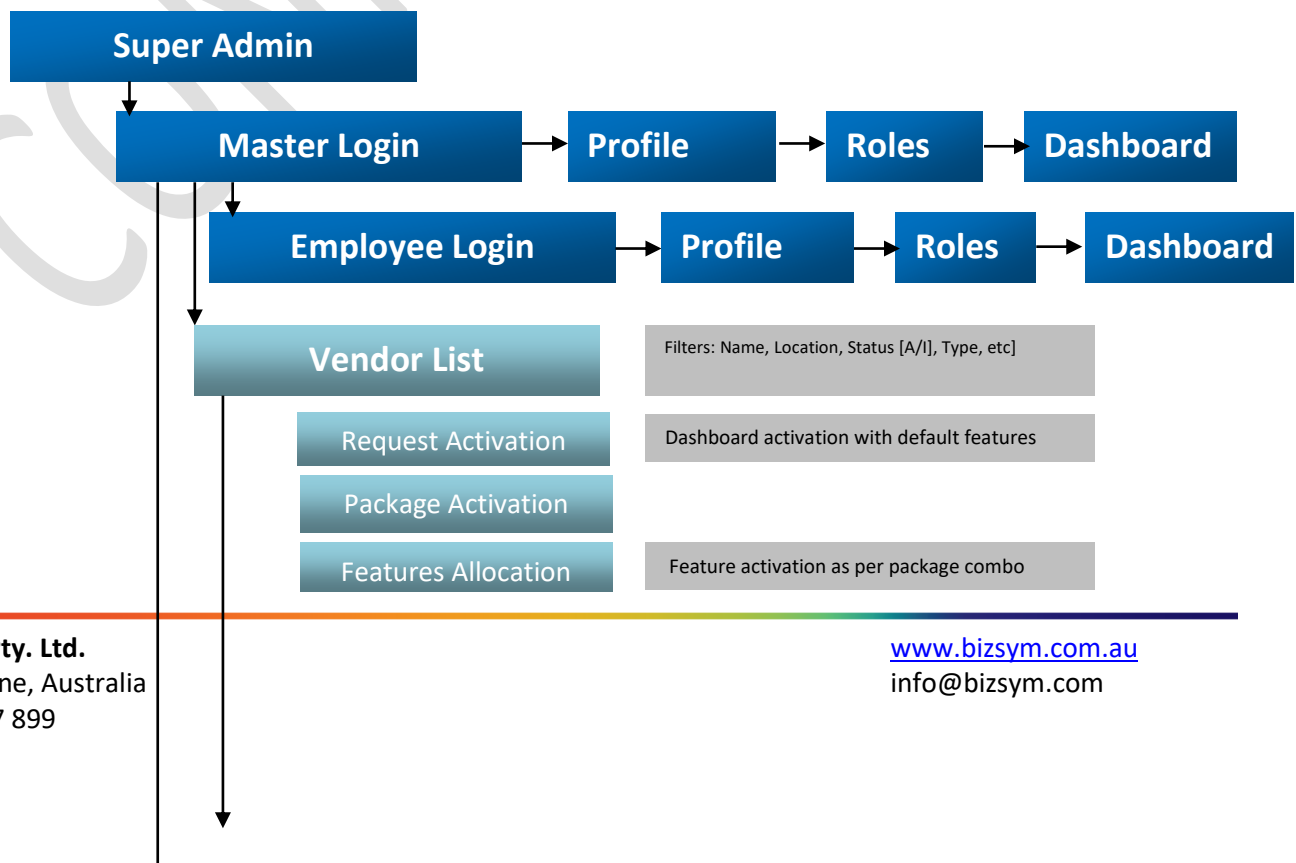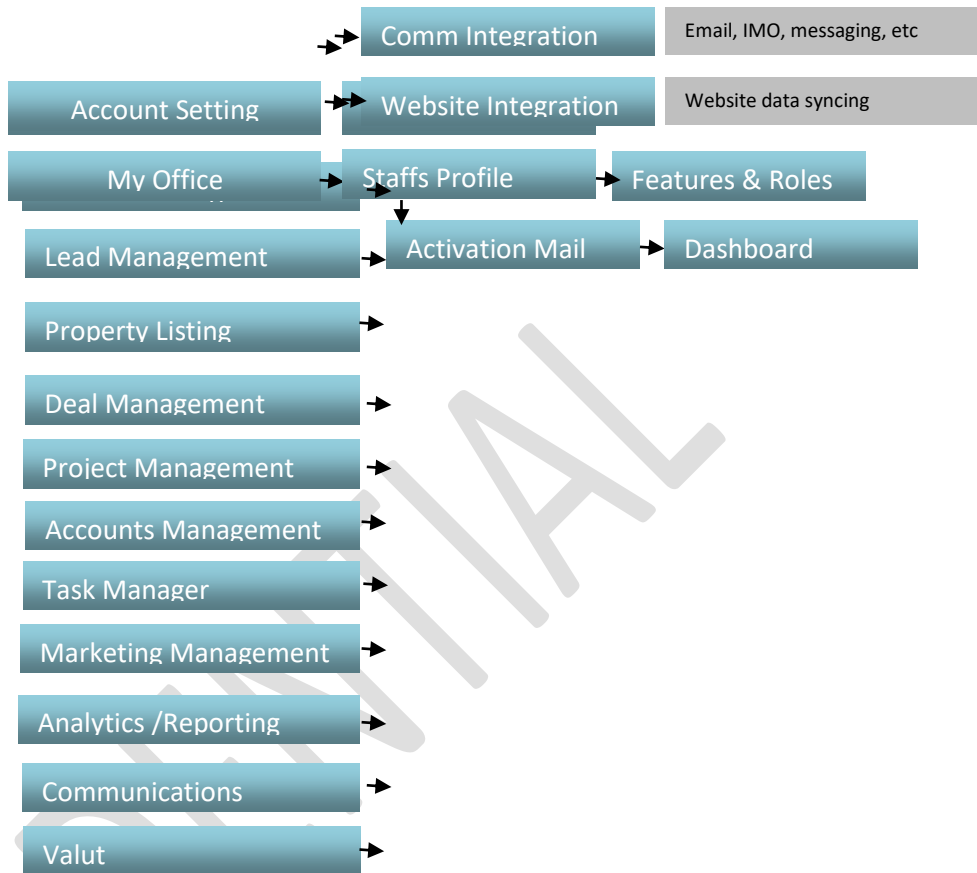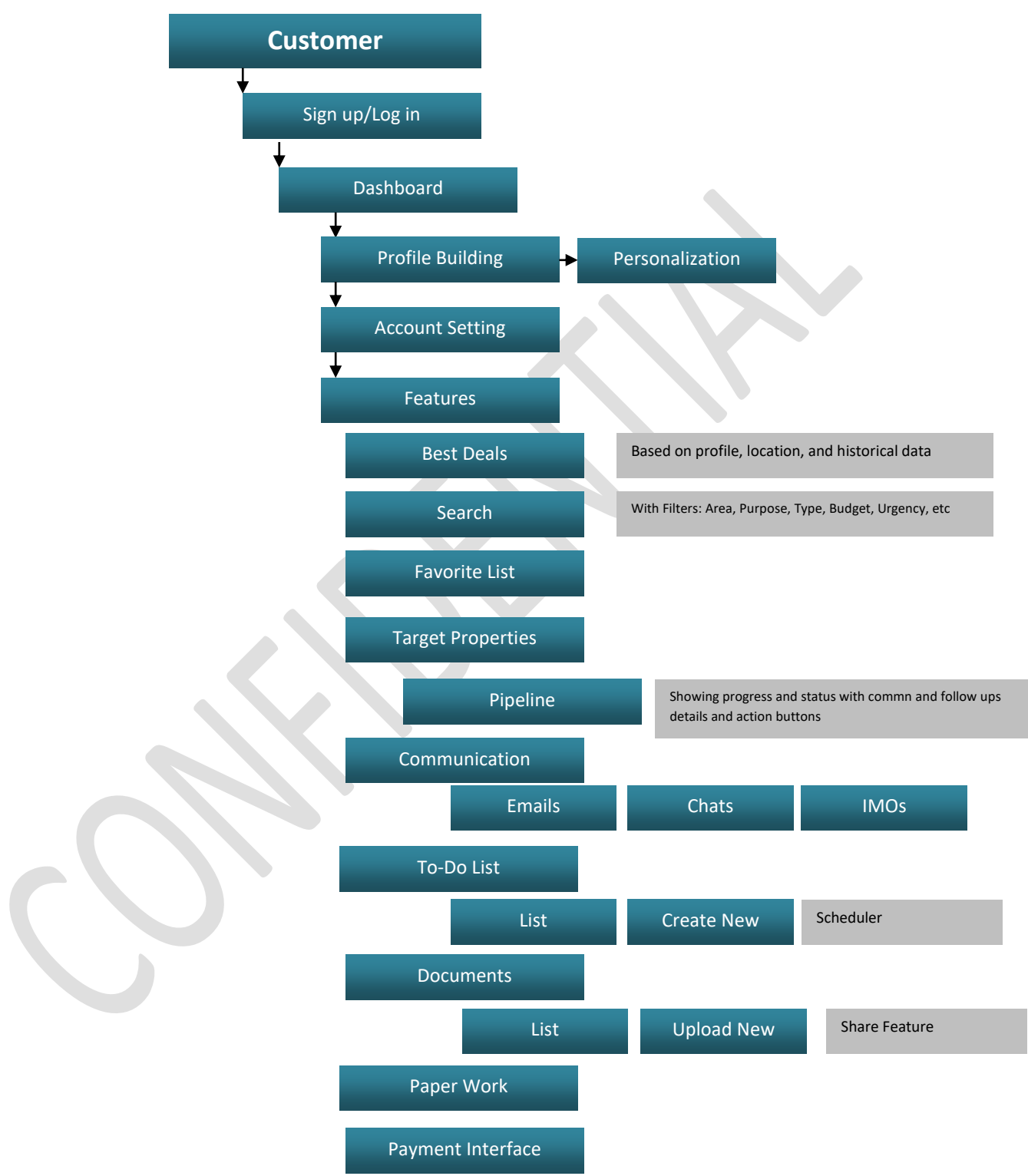
Stage 1

This stage involves development of:

Super Admin

- **Admin Design**

- **Structure**

- **Flow [Interlinks]**

The company (the IT-company) will have master control over all possible operational, administrative, security aspects. So, the structure will have simplified single window access to all possible features and controls. Website 'Home' will capture primary info and user type [need] and accordingly offer customized window [either subscription package- based combination of features or simple customer] for desired information capture and further personalization of dashboard interface.

Super Admin → Master Login → Profile → Roles → Dashboard

Master Login → Employee Login → Profile → Roles → Dashboard

Vendor List — Filters: Name, Location, Status [A/I], Type, etc

Request Activation — Dashboard activation with default features

Package Activation

Features Allocation — Feature activation as per package combo

Comm Integration — Email, IMO, messaging, etc

Account Setting — Website Integration — Website data syncing

My Office — Staffs Profile — Features & Roles

Lead Management — Activation Mail — Dashboard

Property Listing

Deal Management

Project Management

Accounts Management

Task Manager

Marketing Management

Analytics /Reporting

Communications

Valut

Package Planner — P1: Features [x] — P2: Features [x] — P3: Features [x]

Communication System — Emailing — IMOs — SMS — Chat — SMs

Calendar Integrations — Google — Scheduler — Alerts

User Data — Vendor — Customer — Location, browsing, navigation, IP, etc

Permissions — As per privacy policy restrictions

Payment System

Accounts

Others

Customer

Sign up/Log in

Dashboard

Profile Building → Personalization

Account Setting

Features

Best Deals — Based on profile, location, and historical data

Search — With Filters: Area, Purpose, Type, Budget, Urgency, etc

Favorite List

Target Properties

Pipeline — Showing progress and status with commn and follow ups details and action buttons

Communication

Emails | Chats | IMOs

To-Do List

List | Create New | Scheduler

Documents

List | Upload New | Share Feature

Paper Work

Payment Interface

Data Architecture

Master Data

Agents

- o Profile Information
- o Personal Information
- o Contacts [*restricted to agents only*]
- o Leads [*restricted to agents only*] *–data will be captured for visual pipeline presentation to specific user only with access authority*
- o *Projects [restricted to agents only] -- data will be captured for visual pipeline presentation to specific user only with access authority*
- o Sales [*restricted to agents only*]—*data will be captured to show sales progress, analytics, and reporting*
- o Communications [*restricted to agents only*]—*content access will be limited to subject line and timeline for showing progress, tagging, scheduling, and alerts setting*
- o Calendar [*restricted to agents only*]—*limited access as per technological requirement*
- o Scheduler [*restricted to agents only*] -- *limited access as per technological requirement*
- o Alerts [*restricted to agents only*] -- *limited access as per technological requirement*
- o Analytics [*restricted to agents only*]—*data would be captured for graphical presentation of facts and figures*
- o Etc [*restricted to agents only*]

Customers

- o Profile Information
- o Search Data
- o Usage Data
- o Favorites
- o Likes
- o Browsing History
- o Etc