Below are some high level requirements for the CRM implementation. I am open to recommendation on the type of CRM to be used as long as the cost are not too high. More details might need to be flushed out. Looking forward to a proposal and quote

Requirements for the CRM implementation

1. Ability to capture information on new leads that either call or email me
2. Ability to capture information on new leads via Website optin forms
3. Ability to have a pictorial view of the status of each sales opportunity in a Kanban board style (see Trello as an example)
4. Ability to generate emails automatically as each opportunity changes status
5. Ability to integrate to my outlook calendar
6. Ability to send SMS reminders for upcoming meeting to clients / leads
7. Ability to see the leads / clients activity on various social media platform like Facebook, LinkedIn, Twitters etc.
8. As most correspondence with clients are via email or phone. I need to have the ability to capture each correspondence into the CRM under each sales opportunity. For email, I am using outlook and I am hoping to have an outlook plugin to easily save the emails back to each opportunity within CRM
9. Set up a series of Auto responder emails as such:
   1. Send out a birthday greeting email on ALL clients’ birthday (regulated and non-regulated)
   2. Each sales opportunity (regulated or non-regulated) once closed will have a loan settlement date. I want to be able to send out a series of email starting from 2 months prior to the anniversary of the loan settlement date to the clients. There could be multiple clients contact associated with each loan and I want to be sending emails to all the clients associated with a loan. The number of emails to be sent will be around 5 emails for each loan, starting from 2 months before the anniversary date up until about 1 month after the anniversary date. This email is to encourage the clients to contact me to arrange an review of the loan. Once the client gets in touch to arrange for a review meeting. The email sequence should stop. Also note that clients could have multiple sales opportunity as they could have more than 1 loans and each sales opportunity will have their own settlement date/loan anniversary date.
   3. Optin page to be set up on my website to capture leads for an ebook download. Once that lead has been capture within the CRM, a sequence of email to be sent to nurture the leads and encourage them to contact me for a free consult
   4. Optin page to be set up on my website to capture leads for a free property report. Once that lead has been capture within the CRM, a sequence of email to be sent to nurture the leads and encourage them to contact me for a free consult
   5. Optin page to be set up on my website to capture leads for webinar. Once that lead has been capture within the CRM, a sequence of email to be sent to nurture the leads before and after the webinar for a free consult
   6. For point C & D & E above, the optin page could also be simultaneously as facebook marketing advertisements. Hence the CRM needs to be able to capture leads from facebook marketing advertisement as well
10. Ability to send out regular newsletter email to all the contacts with in the CRM
11. Ability for clients or myself to have access to a portal to complete a fact find while with the client. Client might have to complete the fact find over multiple sessions themselves.
12. The fact find needs to be generated as a pdf to be emailed back to the client and myself
13. Ability for clients to upload documents securely to me. The list of documents should be configurable depending on the client’s situation. I should have the ability to approve or reject the documents. Also, if the documents are not being send to me, email reminder should be sent out on a regular basis.
14. I have an existing form on my website to enable clients / lead to book in a time for a free loan consult. This is done using calendly.com and is integrated with my calendar on my caldav server to display my free time. Can the CRM do something similar and replace calendly.com (optional requirements)