CRM Module Specification – HomeServicesEtc.com

# 1. Overview

The CRM module for HomeServicesEtc.com is designed to manage the interactions between job posters and service providers, facilitate subscription billing, track verification status, and ensure transparency across all job applications and communications. It will also include an analytics dashboard and admin controls.

# 2. Key Features

- User Management (Job Posters & Tradies)  
- Subscription Management & Tier Limits  
- Job Application Tracking  
- Document Upload & Verification Tracker  
- Indemnity Confirmation Status  
- Real-Time Analytics Dashboard  
- Dispute Resolution Center  
- Email & Notification Automation  
- Payment Gateway Integration (Stripe/PayPal)

# 3. User Management

- Unique ID generation for each user  
- Role-based access: Admin, Verified Tradie, Job Poster  
- View/Edit profile details  
- Document submission log with timestamps  
- Indemnity checkbox verification

# 4. Subscription & Billing

- Monthly Subscription Tracking by Tier (10, 20, 35, Unlimited)  
- Auto-renewal and expiration alerts  
- Invoice generation  
- Upgrade/Downgrade logic with billing reconciliation  
- Optional Annual Verification Fee

# 5. Job Flow & Activity Tracking

- Tradie job application limits enforced by subscription tier  
- Application timestamp and outcome tracking  
- Dashboard view: Open Jobs, Active Quotes, Completed Jobs, Rating Summary

# 6. Verification & Indemnity Handling

- Upload interface for License, ID, Insurance documents  
- Expiry tracking and automated reminders  
- Manual approval toggle for admin  
- Radio button confirmation for indemnity acceptance (required for account activation)  
- Log of user actions related to document compliance

# 7. Admin Controls

- Access to all user profiles and documents  
- Manual override for subscription plans or document status  
- Dispute resolution panel with notes and action log  
- Insights panel: subscription revenue, user growth, category trends