Perfex CRM Module Request

Catering Event Manager

We would like to create an installable module for the Perfex CRM system that will allow us to book and manage events, specifically for catering purposes. We are not a venue or a restaurant. The main point of this module is that "Projects" are called "Events" and, like a project management CRM, we will use it to:

1. Manage our prospect, existing and past events
2. Communicate with customers (leads, existing and past)
3. Generate proposals and invoices
4. Process payments through the customer portal and payment integration

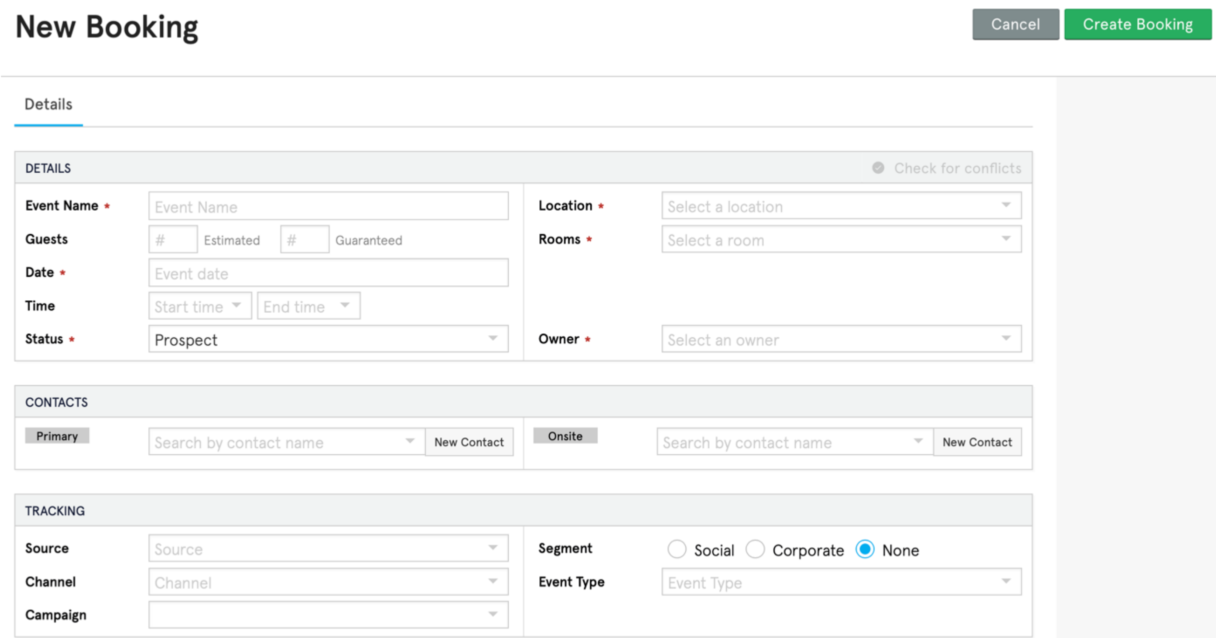
We would like this module to be an all-in-one solution for our business, relying on the power of Perfex CRM.

Project Scope

Creating New Events and Leads

- When sending proposals from lead, **create a customer** and **tentative event** automatically and make it show up in event calendar with Event Status as "Prospect"
- If making any edits to proposal and resending to client, system should not create a new customer or event.
- When creating a new proposal for existing customer/leads, system should only generate **new event**, not a repeat customer
- The leads, proposals and events should have the following fields, and they should all communicate with each other (the information inputted in the lead would transfer to the proposal and event, like a default field and not a custom field). Admin should be able to decide what fields are required in each of the three windows.
    - Event Details
        - Event Name
        - # of Guests Estimated
        - # of Guests Guaranteed (Formula to always be -10% of Estimated)
        - Start and End Date & Time (Date Time Picker)
        - Multi-Day Checkbox (More info below)
        - Location
        - Address
        - Service Type (More info below)
        - Event Status (More info below)
        - Notes
        - Event Coordinator (Dropdown menu – Admin selects which CRM users to appear here)
    - Customer Details
        - First and Last Name
        - Phone Number

        - Email
    - Tracking
        - Source (Dropdown menu – Admin selects choices in the back end)
        - Segment (Radio button: Social | Corporate | Wedding)
        - Event Type (Dropdown menu – Admin selects choices in the back end)
- Example:

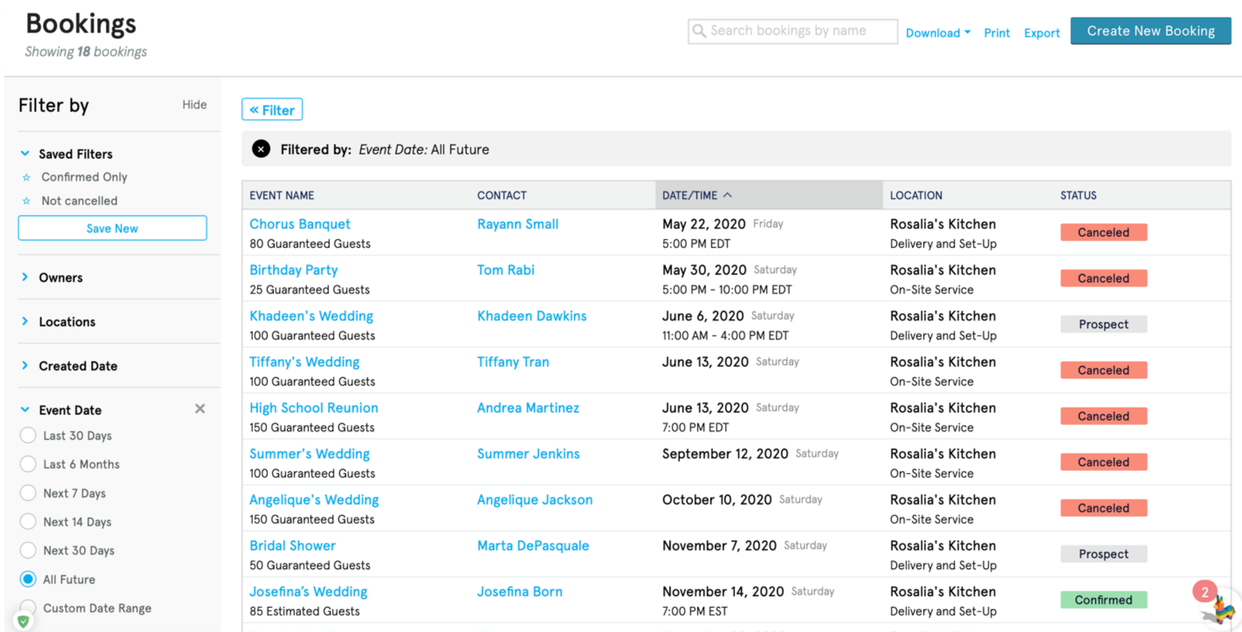


Automated Event Statuses

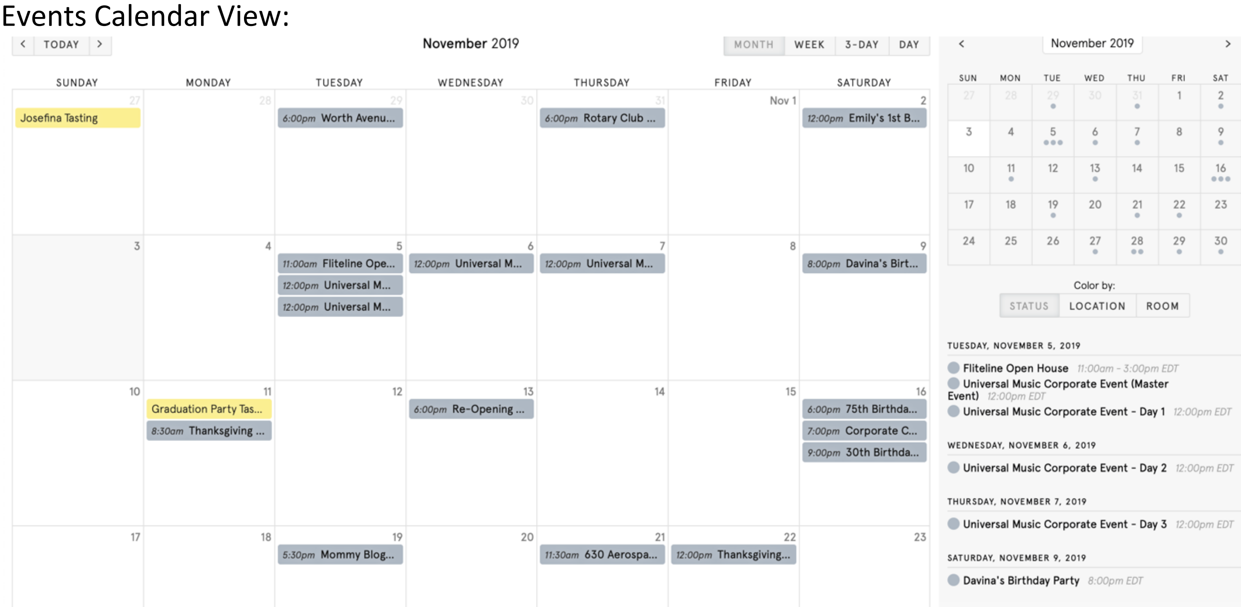
- Event statuses:
    - “Prospect” (Light Gray)
    - “Tentative” (Light Orange)
    - “Confirmed” (Light yellow)
    - “Paid In Full” (Light Green)
    - “Need Payment” (Light Purple)
    - “Cancelled” (Light red)
    - “Closed” (Light Blue)
- Allow admin to change colors and add/remove custom statuses.
- Set up Kan Ban view pipeline for events, similar to the proposal pipeline. Also, allow to see events in a calendar view and in a list view (organized by date, ascending)
- Once the Lead is converted into a Proposal, automatically create an event in the calendar and set the status as “Prospect.”
- When Deposit Invoice is paid, automatically change Event Status to “Confirmed.”
- When Balance is paid and event balance is $0, automatically change Event Status to “Paid In Full.”
- When Event Date passes and the event balance is $0, automatically set event at “Closed”
- When Event Date passes and there is an unpaid balance, automatically set event as “Need Payment”

- Examples:

Events List View



Events Calendar View:



Multi-Day Events

- Add a check box: “Multi-Day Event” in Lead, Proposal and Event pages (event start/event ends)
- When checked, open the multiple day feature. This would add an “event end date” pick field and then create “subevents”, each with their own details (date, time, notes, menu, contact, address, staff) but all would be under the same Proposal and Invoice

Service Type

- To Leads, Proposals and Events, add Service Type field with these options:
  - Drop-Off Only
  - Delivery and Setup
  - On-Site Service
  - Other (User-input field)
- Allow admin to add/remove and customize these options from the back end.
- When selecting “Drop-Off Only”, add line item to proposal/invoice: “Delivery Charge” (Drop-down menu with customizable options in the back end)
- When selecting “Delivery and Setup”, add line item to proposal/invoice: “Delivery and Setup Charge” (Drop-down menu with customizable options in the back end)
- When selecting “On-Site Service”, add line item to proposal/invoice: “Delivery Charge” (Drop-down menu with customizable options in the back end)
- These charges should appear at the bottom of the list of items of the proposal/invoice, and should act as a regular line item, part of the calculation for Subtotal and Total
- Retain ability to modify pre-set price directly on the actual proposal/invoice.
- These charges are **taxable**.

Event Staff (Non CRM Users)

- Add the option to add an Event Staff member to each event
- These Event Staff members should live in a menu similar to “Items” or “Ingredients”
- Each Event Staff “item” or profile should include the following tabs: Contact Information (First name, last name, phone, email, location, category), Notes, History, and Files (with a Dropbox and Google Drive picker)
- Create ability to Group Event Staff by categories: Bartenders, Waiters, BOH Staff, etc. and allow admin to create new groups/categories. Allow admin to select more than one category for an Event Staff member
- Add option to “add” a staff (CRM user) or non-staff (Event Staff) member to an event and notify them on the event details via email and SMS: event name, event location, Time/date, duration. This message can be sent to more than one event staff at a time, and admin can edit the text before sending. Allow ability to CC or BCC event staff.
- Automatically send e-mail to selected Event staff members once Event Status = “Confirmed” or “Paid In Full”
- Automatically save staff member’s event history into the “History” tab
- Ability for staff to log in and see their schedule.
- Ability for staff to start, submit and access timing sheets
- Allow Admin to import staff using Excel .csv file

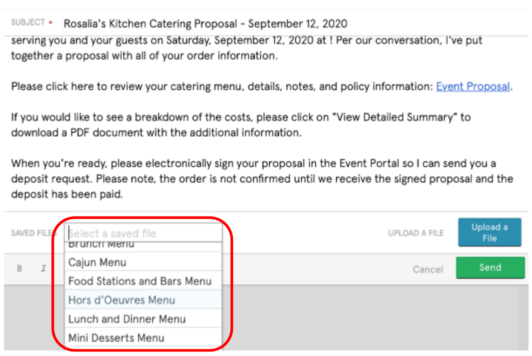
Calendars:

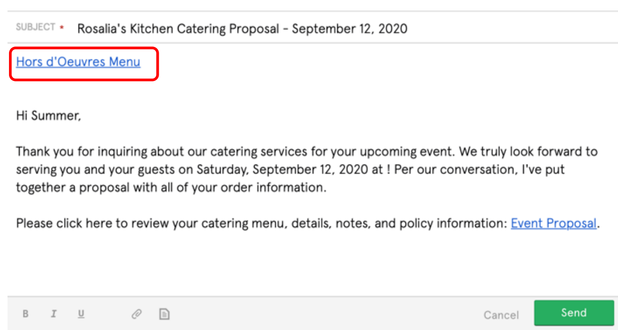
- Option to add Events dates and time calendars, from each event. Default would be to add event to calendar.
- Option to choose the event status and filter by each status.
- Option to filter by Staff members (CRM Users)
- List view/calendar view by week/month/year.

- Ability to block entire days and add individual events that are linked to an existing future event (Like a Pre-event Meeting in May for a Wedding in November)

Initial Lead Communication

- Ability to send Lead/Customer a form they can use to select Items from our "Items Library"
- Once they select the items, they should preview their final selections and submit it. These selections should go back into the CRM and automatically feed into line items in a new or existing (open) proposal for an event.
- Generate automatic e-mail notification to event owner/coordinator that the customer selected the items and the proposal is ready for review (This text should be editable by admin)
- CRM user should be able to select what Categories from the Items Library to show the Lead/Customer
    - For example: I send John only the appetizers category and he selects 5 from our library. These 5 items show up in the Draft Proposal.
    - Similar to the following to choose the category:





Emails/Customer Messaging System:

- Capability to have e-mail conversation with a lead and customer (with and without templates) from within the lead details/event manager
- Emails should come from the CRM user's e-mail address, as default. Allow users to select generic Global e-mail addresses if they want to.
- Ability for CRM user to see all communications with a customer or lead, like an inbox-outbox (includeing sender, recipient, subject and body of message). Please, make this HTML rich.
- Whenever CRM user sends email to lead or customer, the contact profile should update to show the latest communication with the timestamp in the Activity Log
- These messages should have the e-mail tracking capability
- Example:

From: cindy lopez	Monday, March 23, 2020 at 3:59pm
To: Rafael Brazon-Di Fatta<info@rosaliaskitchen.com>

Hi Rafael,
Thank you very much for your email. I have already made arrangements for the dinner tomorrow but I will reach out to you the next time I have an event.
Kind regards,

CINDY LOPEZ
Owner/Operator
LCL Food Services, dba McDonald's

P: 305-252-8961 x41 **F:305-252-8962**
Email: cindy@lclfoods.com

13349 SW 131st Street
Miami, FL 33186
www.lclmcdonalds.com

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Attachments
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From: Rafael Brazon-Di Fatta	Monday, March 23, 2020 at 3:18pm
To: Cindy Lopez<cindy@lclfoods.com>

Hi Cindy!

Thank you for reaching out regarding catering for your event to be held on Tuesday, March 24, 2020. I just left you a voice message, I wanted to get more information on the event.

Please click on the following link to review our catering menu. Once you have your selections, please share them with me so I can put together a quote and proposal for you. For your reference, all the items in our menu range between $13 and 18 per person, including 2 sides, a salad and bread.

Lunch and Dinner Menu

- Add templates of emails, add new email triggers to different actions
- Templates should be editable in an HTML-rich editor (WYSIWYG) and not in the PHP settings
- Option to use ALL merge tags from the Event Manager (Lead, Proposal, Event, Invoice, etc.) in ALL emails
- Automatic email asking for feedback after event – CRM user can toggle this message on or off in each event
- Automatic payment e-mails to customers with deposit requests or payment deadlines based on terms of the invoice (the payment schedule CRM user sets when sending Proposal and Invoice)

Client Search and Link

- In the event manager, capability to search and link a customer to the event using name, phone or email

Information Transfer: Lead -> Proposal -> Event

- All fields, including custom fields, should transfer automatically from leads to proposals and events

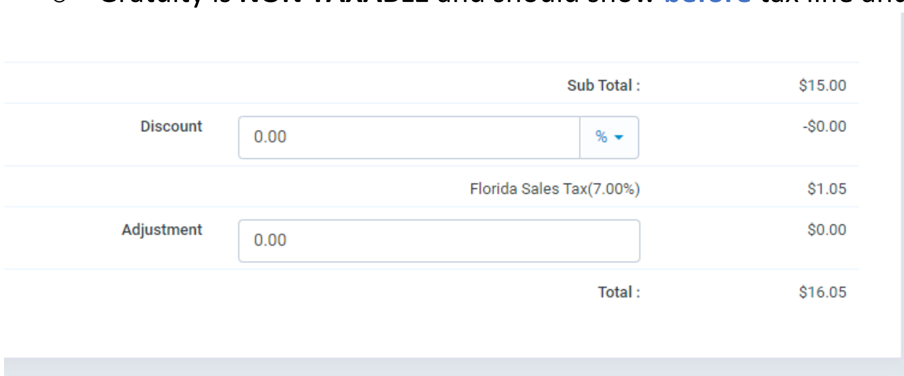
Ingredients and calculator per person

- Add an option for ingredients list
- Link Items to ingredients and add capability to define quantity of ingredients
- Create an option to generate a report of what ingredients and how much of it is needed per event

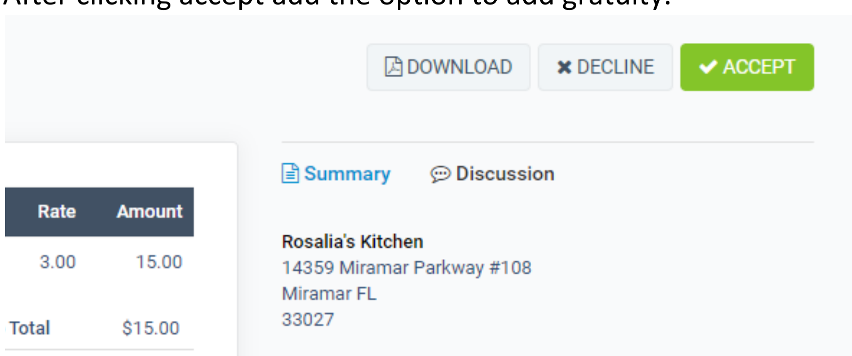
- Automatically generate this report and email it to Chef (allow us to change recipients) with all event details once Event status is set to "Confirmed"
- Allow Admin to import items using Excel .csv file

Invoices

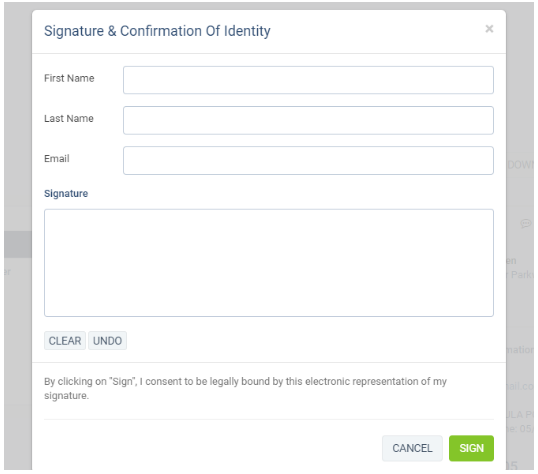
- Option to add deposit for events ($ or %) for each invoice, including payments dates.
- Add option for several payments ($ or %) on each invoice, including payments dates.
- Add admin/employee gratuity field in proposals and invoices
  - Default options:
    - 10%
    - 15%
    - 20%
    - Other (Custom options for % and $)
  - Gratuity is **NON TAXABLE** and should show **before** tax line and calculate total.



- Add option for customer-input gratuity in proposal before they approve
  Change the "**Discussion**" to "**Notes**"
  After clicking accept add the option to add gratuity.



On this screen add buttons in before First name:
"**Please select gratuity:**" Buttons: **15%** , **18%**, **20%** / **Other (custom $/%)**



PDF Modifications:

- Modify or create PDF templates for the following documents:
  - Proposal
  - Contract
  - Invoice
  - Event BEO
  - Chef BEO
- Please see samples attached

Super User Access:

- Super user to control all the features
- Make custom fields (event name, event date, etc.) appear in proposal/invoices, website and other places.
- Make everything responsive for mobile and tablets.
- Ability to create access to each customer to web-portal and show on web portal all their events, proposals and invoices.
- System should always check if customer already exist in the database and ask for confirmation that it is the right customer, in case of a new customer with the same name.
- Super user should be able to toggle ALL features on/off to specific users depending on CRM user's Role
- Leave all current options in system available
- All extra options would be customized in the setting menu of the admin side.