**SOAR AI – Corporate Intelligence Platform**

## Overview

**SOAR AI** is a corporate intelligence and lead management platform designed to assist travel businesses in discovering, qualifying, and closing deals with corporate clients. The system integrates AI-driven analytics, automated lead workflows, and contract management into a unified interface.

This document captures the complete functional understanding and requirements of the SOAR AI application.

## 1. Application Modules & Menu Structure

### **1. Highlights**

* **AI Assistant**
  + Natural language interface to interact with the system.
  + Responds to queries related to corporates, deals, contracts, revenue, etc.
  + Can execute tasks and provide smart suggestions.
* **Dashboard**
  + System overview with metrics like total leads, revenue, qualified deals.
  + Visual KPIs and graphs (lead stages, performance, etc.).

### **2. COINHUB (Corporate Intelligence Hub)**

* **Corporate Search**
  + Search and discover corporate clients using filters (industry, location, employee count, etc.).
  + Displays key data such as company name, budget, revenue, rating, etc.
* **Lead Dashboard**
  + Overview of lead pipeline across all stages.
  + Summary view of new, qualified, unqualified, and opportunity leads.
* **All Leads**
  + Master list of all captured leads.
  + Display fields: company name, contact details, stage, owner, last contact.
* **Qualified Leads**
  + Leads that meet qualification criteria (travel interest, size, budget).
  + Tagging and scoring system.
* **Unqualified Leads**
  + Leads that didn’t meet criteria or didn’t respond.
  + Can be nurtured for future outreach.
* **Email Campaigns**
  + Automated email outreach to lead lists.
  + Tracks open, click, and response rates.
* **Opportunities**
  + Leads that moved into active deal stage.
  + Includes notes, negotiation steps, and sales activities.

### **3. COCAST (Corporate Contract & Spend Analytics)**

* **Revenue Prediction**
  + Predicts potential revenue from each corporate client.
  + Uses AI models trained on past contract performance.
  + Useful for prioritizing and forecasting.

### **4. CONTRAQ (Contract Management)**

* **Contracts**
  + Management system for corporate agreements.
  + Track contract status, start/end dates, alerts for renewals.
  + Upload signed PDFs, store versions, manage clauses.

## 2. Workflow Summary

| Step | Module | Description |
| --- | --- | --- |
| 1. Discover Corporates | Corporate Search | Target corporates with high travel potential |
| 2. Launch Outreach | Email Campaigns | Run campaigns to pitch services |
| 3. Collect Responses | All Leads | Track and manage all responses |
| 4. Qualify Leads | Qualified/Unqualified Leads | Categorize based on interest |
| 5. Advance Deals | Opportunities | Track proposal and discussion stage |
| 6. Finalize Contracts | Contracts | Sign and manage agreements |
| 7. Predict Growth | Revenue Prediction | Forecast potential deal values |

## 3. AI Assistant Capabilities

* Interface for asking:
  + “Find corporates in Bangalore with >500 employees”
  + “Show me unqualified leads this month”
  + “What’s the predicted revenue from TechCorp?”
* Suggest tasks:
  + “Send follow-up email to unresponsive leads”
  + “Mark contract with InnovateX as expiring next week”

## 4. Key Business Benefits

| Feature | Value Proposition |
| --- | --- |
| AI Assistant | Speeds up user interaction via smart queries |
| Corporate Search | Identifies high-potential corporate clients |
| Automated Campaigns | Saves time with intelligent outreach |
| Funnel Tracking | Ensures visibility across sales stages |
| Contract Management | Prevents missed renewals or delays |
| Forecasting | Helps sales prioritize & plan |

## 5. Developer Integration Points (To Be Detailed Later)

* **Corporate Data API** – Fetch corporates based on filters.
* **Lead Lifecycle Service** – CRUD for leads and opportunity stages.
* **Campaign Service** – Email automation workflows.
* **Revenue AI Model** – Endpoint to predict revenue.
* **Contract Upload/Parser** – Upload and manage contracts.
* **Assistant NLU Engine** – NLP interface using Rasa/OpenAI.

## 6. Next Steps (Optional Enhancements)

* Add document viewer for uploaded contracts.
* Integrate third-party corporate data providers.
* Embed charting tools in the dashboard.
* Provide granular role-based access controls (RBAC).

## Document Source Reference

* Sheet: **SOAR AI TASKs LIST (1).xlsx**
* Sidebar Screenshot: **SOAR AI Menu UI**

Let me know if you’d like this exported as PDF, or broken into smaller documents like: PRD, UI spec, API spec, etc.