

SocialFirst CRM

Basic Features

1) User Management

- a. Allows staff to create and manage other users
- b. There should be a Superuser role that has all access (one for client, one for us)
- c. Permissions must be given before the staff can create/remove other staff
- d. Permissions need to be assigned for each module listed below

2) Customer Management

- a. Create and manage customer profile
- b. Name, birthday, gender, email, phone, Instagram ID (if Instagram URL is entered, use JS to remove the url and keep the ID)
- c. Search for customer by name, phone or email
 - i. Customer Profile Page
 - ii. If system has Customer's IG profile, show how many followers the Customer has on the profile page. Use API to pull customer's latest 3 IG posts (image, description, date & time)
- d. Log Customer's Visit and Activities
 - i. Log which dress the customer tried
 - ii. Log which staff served the customer

3) Brand Management

- a. Allows staff to create and manage brands (just name will do)

4) Product Category Management

- a. Create and manage categories (just name will do. E.g Dresses, Shoes, Photography, Flowers etc)

5) Product/Service Management

- a. Product/Service Name
- b. Product Type (product or service)
- c. Retail Price
- d. Images
- e. Category
 - i. A product can belong to several categories
- f. Keyword Tags
 - i. This allows the staff to add keywords to the product (e.g white, long, elegant, long drapes, low cut)
 - ii. The UI should work like this:
<https://davidwalsh.name/demo/textboxlist.php> but please use a nicer library. This library is very old.

- g. Checkbox to indicate if this product should “Include in Preference Predictor”. The results will show in the customer’s profile in terms of Keyword Tags. For example (40% low cut, 29% high waist, 2% bare back etc)

6) Package Management

- a. Allows staff to create and manage Packages
- b. Staff can add variations of products to the Packages
- c. For example, staff will indicate that this Package has 5 items
- d. Select Item 1. Staff will indicate which Product is the Default Product.
- e. Then staff will need to indicate all the other products that are eligible to be used as Item 1.
- f. Same for items 2 to 5.
- g. All packages have a name and default price.

Advanced Features

1) Preference Predictor

- a. Any users can come to this page
- b. System pulls out a photo from 100 random products that checked “Include in Preference Predictor”.
- c. This is like Tinder. User will swipe right or left, to indicate if they like the dress or not.
- d. After 100 swipes, the system will prompt the customer for their email

2) Order Management

- a. Select Package -> Display the default items
- b. Edit Items in a Package
 - i. Staff can replace items. For example, Item 1.
 - ii. If Default item is \$100, and the replacement item is \$120, the value of the package should add \$20.
- c. Assign to a Customer

3) IG Common Interest

- a. This is a cron job
- b. For customers that gives their IG, use IG unofficial API to pull username of all the accounts they follow
- c. This is to find out which IG accounts are the most popular among Customers