




REAL ESTATE CRM MOBILE APP – FULL STORYBOARD

1. Multi-Role Login System

Login Roles:

-  Super Admin
-  Manager / Team Lead
-  Executive / Sales Agent
-  Customer

Secure Login:








- OTP-based login for all
 - Role-based access control
 - Ability to switch accounts
-

2. Role-Based Access Matrix

Feature / Module	Super Admin	Manager	Executive	Customer
Dashboard	All Users	Team View	Self View	Self View
Leads	All	Team Only	Assigned Only	✗
Manual Lead Entry	✓	✓	✓	✗
Lead Follow-ups & Closure Time	✓	✓	✓	✗
Hold/Cold Leads Management	✓	✓	✓	✗
Add Team Members	✓	Add Below Only	✗	✗
Projects View	Full Access	Editable	View Only	View Focus Projects
Cab Booking	For All	For Team	For Assigned Leads	Focus Projects Only
In-App Chat & Video	Full	With Team	With Customers	With Assigned Agent

Feature / Module	Super Admin	Manager	Executive	Customer
GPS Attendance	Monitor All	Team View	Mark Own	✗
Calendar & Scheduler	Team-wide	Team	Own	View Appointments
Email Campaigns	Full	Team-Based	Customer Follow-up	View Receipts
Call Recordings & Notes	All	Team Only	Assigned Only	✗
Project Sharing	Create/Edit/Share	Share Only	Share Only	Share Received
Documents Upload	All	Team	Assigned Customers	View/Download
Notifications	Global	Team	Assigned	Self
Site Visit Automation	All	Team Schedule	Assigned	Book (Sunday Only)

3. Leads Management Module




-  Manual Lead Entry Form
-  Lead Status: New, Follow-up, Cold, Hold, Closed
-  Call Logging & Recording
-  Follow-Up Reminders
-  Target Closure Date Field
-  Link to Project + Assigned Agent
-  Attachments (ID Proof, Notes, etc.)

4. GPS Attendance for Executives






- Enabled only during working hours
- Geo-tag attendance log (Clock In/Out)
- Admin can view attendance reports
- Sunday auto-disable (unless site visit)

5. In-App Chat with File & Media Sharing

- Chat system per lead/customer

- Share:
 -  Documents (PDFs, Brochures)
 -  Photos (Plots, Approvals)
 -  Notes
 - Video Call button in chat
 - Recording-enabled calls (optional)
-

6. Video Calling + Call Recordings + Calendar


-  Integrated scheduler for meetings
 -  Invite users to call/meeting
 -  Video call from within chat
 -  AI-based reminder alerts
 -  Recordings saved to lead profile
-


7. Email Management System

- Compose, send, and schedule emails
 - Automated welcome emails for bookings
 - Templates for promotions, updates, site visits
 - Customer receives:
 - Booking confirmations
 - Site visit reminders
 - Payment alerts
 - Project brochures
-






8. Project Module (Viewable + Shareable)

Admin & Team:

-  Add new project with:
 - Images, Videos
 - Location map
 - Layout plans

- Brochures
- Approval letters
-  Share project via:
 - WhatsApp
 - Email
 - Public Link

Customer View:









- View “This Week’s Focus Projects”
 -  Download brochure
 -  View map/location
 -  Book cab for site visit (Sunday only)
 -  Call agent /  Submit interest form
-

9. Cab Booking System (Auto Allocation)

- Auto-enabled **only for Sunday**
 - Available to:
 - Sales for lead visit
 - Customer for focus project visit
 - Flow:
 1. Select Project
 2. Pick Time Slot (Sunday)
 3. Enter Pickup Address
 4. App confirms cab with:
 - Driver Name, Number
 - ETA
 - SMS + Email Confirmation
 5. Auto-assigned agent notified
-

10. Customer Login Portal


Features after OTP login:

-  “This Week’s Focus Projects”
 -  Book Cab for Visit (Sunday)
 -  Download Project Files
 -  View My Bookings
 -  Chat with Assigned Agent
 -  View Gallery / Videos
 -  See Visit Appointments
 -  Raise Support Tickets
-

11. Employee Hierarchy Management

- Super Admin creates all roles
 - Managers can add executives under them
 - Each user sees only subordinates
 - Used for:
 - Attendance Reports
 - Lead assignment
 - Performance tracking
-

12. Booking Module for Plots

- Admin/Agents can:
 - Add new booking
 - Tag project + plot ID
 - Attach documents
 -  Customer receives:
 - Welcome greeting via SMS/Email
 - Access to view booking
 - Status: Booked / In Progress / Registered
-

13. Project Sharing & Public Access

- Each project has:

- Shareable public page
- Brochure download
- WhatsApp/email share options
- Option to “Book a Visit” (auto-lead)






14. Central Calendar + Scheduler

- Team meetings, site visits, cab bookings
- Executives can block time for meetings
- Customers receive reminders for:
 - Site visits
 - Document collection
 - Payment due dates

15. Weekly Focus Project System (Auto Marketing)

Day	Task
Monday	Admin selects 1–3 focus projects
Tuesday	Email/notification sent to all customers
Wednesday–Friday	Cab booking enabled for customers
Saturday	Final reminder sent
Sunday	Visits occur with auto attendance, chat updates

16. Summary of Core Features

Module	Status
Multi-Login with Roles	
GPS Attendance	
In-App Chat + File Sharing	
Email Campaigns + Templates	
Video Calls + Recording	

Module	Status
Customer Login Portal	✓
Focus Project & Cab Booking (Sunday Only)	✓
Lead Management with Follow-ups	✓
Project Sharing + Public Links	✓
Plot Booking System + Welcome Email	✓
Employee Hierarchy & Reporting	✓
Document Management & Uploads	✓
Full Calendar & Meeting Scheduler	✓

This Document is prepared by D Naveen Chakravarthy