

**We are looking at probably Evernote API and OneNote then maybe a third that is for a CRM like Monday.com**

**NOTE: Flutter plugin that we can load into our app**

**NOTE: We gave our own app. We need the API plugins**

**The objectives are all in that document:**

[https://docs.google.com/document/d/14OtxUwohrCspDZPsX6ar8NqOS7ghWilrF6-\\_cp5s50Y/edit](https://docs.google.com/document/d/14OtxUwohrCspDZPsX6ar8NqOS7ghWilrF6-_cp5s50Y/edit)

**Essentially here's the requirements:**

1. Must be developed in Flutter
2. Evernote
3. Monday.com

**Must be able to write to those services**

1. **MONDAY API** - <https://support.monday.com/hc/en-us/articles/360005144659-Does-monday-com-have-an-API->

Here is what is needed:

1. Create a contact and write a note to the contact
2. Write a note to a contact
3. Write a note to a Deal

# Contacts ☆

Last seen JK Invite / 1 Activity + Add to board ...

Welcome to your contacts board! Here you can store and manage all of your contacts

Main Table Contact types + Add View

Integrate Automate

New Contact Search Person Filter Sort

Contacts	Type	Priority	link to Deals	Phone	Email	Notes
Phoenix Levy		High	Deal name 2	+1 325 478 5698	Phoenix@email.com	
Madison Doyle		High	Deal name 1	+1 854 722 0499	Madison@email.com	
Leilani Krause		Medium	Deal name 3	+1 312 563 2541	Leilani@email.com	
+ Add Contact						

Please confirm your email address: josh@closenote

Main workspace

Sales Pipeline ☆

Learn how to use this template: <https://www.loom.com/share/37c9c80d94bf463cb7a0>

Main Table Deals status Form + Add View

New Deal Search Person Filter Sort

Start from scratch

CRM

- Sales Pipeline
- Contacts
- Lead Capturing
- Sales Dashboard
- CRM Learning Center

Deals

Deal name	Tasks	Owner	Contacts
Deal name 1	1		Madison Doyle
Deal name 2			Phoenix Levy
Deal name 3			Leilani Krause
+ Add Deal			

Closed Won

Deal name	Tasks	Owner	Contacts
Deal name 4			Phoenix Levy

Deal name 1

Item Card Updates Activity Log **Emails & Sales activities** Quotes + Add View

CommuniHub

New email **New note** New event

Upcoming

No upcoming events recorded yet.

Previous

No previous events recorded yet.

Main workspace

Contacts ☆

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Main Table Contact types + Add View

New Contact Search Person Filter Sort

Start from scratch

CRM

- Sales Pipeline
- Contacts**
- Lead Capturing
- Sales Dashboard
- CRM Learning Center

Contacts

Contacts	Type	Priority	link to Deals
Phoenix Levy		High	Deal name 2
Madison Doyle		High	Deal name 1
Leilani Krause		Medium	Deal name 3
+ Add Contact			

Phoenix Levy

Item Card Updates Activity Log **Emails & Sales activities** Quotes + Add View

CommuniHub

New email New note New event

Keep all communications in one place

Send and receive client emails

Capture meeting notes, events and more

Create email templates

Learn more

**and for Evernote:** <https://dev.evernote.com/doc/>

For Evernote must be able to login to existing account, must be able to create a new notebook, must be able to write a txt and pdf file to new page

For Monday, login, must be able to write and activity to an opportunity, and account using .txt and pdf

Please use the same requirements for Monday as is listed for SAP and Zendesk

here's an example:

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Customer Name: XYZ Babysitting  
Customer ID: 12245

Attendees:  
Bob Thomas  
Jim Stephens  
Sarah Smith

Customer Story:  
XYZ Babysitting is expanding into 2 new markets, including dog walking services. They are looking for ways to streamline their growth.

Concerns:  
Minimizing upfront costs >24,000  
Potential for market not to be lucrative High risk of shortfall

Next Steps:  
Coordinate follow-up meeting with legal team to review contract 5/1/2021

The text file will always be the same style

the difference is where they paste to

I have a team of developers you can communicate with for questions when you get started