

## Core CRM Modules

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### **Contacts & Accounts**

- Contact & Account Management
- Custom fields and tagging
- Bulk import/export (CSV/Excel)
- Activity timeline per contact
- Contact segmentation (tags, filters)

### **Communication & Engagement**

- Email templates and bulk emailing
- Email integration (Gmail, IMAP, SMTP)
- Call logging and notes
- WhatsApp & SMS integration (via Twilio or Gupshup)
- In-app notifications & reminders

### **Sales & Pipeline**

- Kanban-style sales pipeline
- Multiple pipelines support
- Lead scoring (AI-enabled)
- Lead source tracking
- Deal stage automation
- Conversion rate analytics

### **Calendar & Scheduling**

- Meeting scheduler
- Task management and reminders
- Google Calendar / Outlook sync
- Shared team calendars

### **Reporting & Dashboards**

- Real-time dashboards
- Sales forecasting reports
- Revenue reports (by agent/product/time)

- Custom report builder



## AI & Automation Module (Pro Tier)

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### ◆ Smart Assistants

- AI-based lead scoring
- Email reply suggestions (NLP)
- Customer sentiment analysis (chat/email)
- Task and follow-up prediction
- AI-generated sales summaries

### ◆ Automation

- Workflow builder (If-this-then-that)
- Automated email and SMS triggers
- Deal stage automations
- Auto-assign leads to agents
- Smart reminders for inactive deals/contacts



## Localization & Regionalization

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### ◆ Language & Culture

- Full multi-language support (i18n-ready)
- Right-to-left support (for Arabic, Divehi, etc.)
- Local date/time formats
- Fiscal year customization

### ◆ Currency & Tax

- Multi-currency support
- Custom tax rules per region
- GST/VAT fields for India, BD, etc.



## Finance & Billing

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- Quotation & Invoice generation
- Payment tracking
- Product/service catalog
- Integration with Stripe, Razorpay, SSLCOMMERZ, etc.
- Expense tracking

## **Support & Helpdesk Module (Optional Add-on)**

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- Ticketing system
- Customer portal
- Auto-responses & SLA rules
- Knowledge base / FAQ
- Chatbot integration (Dialogflow/RASA)

## **Knowledge & Document Center**

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- Document uploads (PDF, Docs, etc.)
- Internal notes per account
- Activity logs
- Secure sharing & access control

## **Admin & System Management**

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- Role-based access control
- Teams and departments
- Audit trail / activity logs
- System settings (branding, date/time, etc.)
- API access + Webhooks

## **Mobile & Remote Access**

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- Progressive Web App (PWA)
- iOS/Android mobile app (optional)

- Offline mode for contact management
- Push notifications

## Integrations (via Zapier, API or native)

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- Gmail/Outlook
- Google Calendar / Microsoft 365
- WhatsApp Business API
- Slack, Zoom, Telegram
- Payment gateways (Stripe, PayPal, Razorpay, SSLCOMMERZ)
- E-commerce (Shopify, WooCommerce) for B2C extensions

## SME-Specific Features

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- Loan/payment tracking for microfinance CRM
- Distributor/dealer management module
- Retail POS CRM sync (optional)
- Training & onboarding module
- Simplified UX for first-time digital users

Would you like a feature matrix (Basic vs Pro plan), or modular Laravel structure suggestions for implementing these in code?