AMP CRM - Feature & Functionality Proposal

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1. Purpose

This document presents what Amplus Subsidy Solutions will receive as part of the CRM platform.

The system will provide an end-to-end operations framework for lead handling, client management, project execution, invoicing, and internal control for back-office teams.

2. User Roles

The CRM will support two primary roles:

1. Admin
• Full access across all modules
• User management and role/module access control
• Configuration management and workflow supervision
• Project/invoice governance and operational oversight

2. User
• Access only to assigned modules
• Day-to-day execution based on access rights
• Controlled visibility across lead/client/project workflows

3. Dashboard & Operational Visibility

The platform will provide a role-aware dashboard with:

• Admin-specific executive metrics and distribution insights
• User-specific "My Work" execution dashboard
• Pending task visibility with direct action navigation
• Stage-level progress indicators
• KPI readiness for future reports

4. Lead Management

The CRM will include complete lead lifecycle management:

• Manual lead creation with structured multi-step intake form
• WordPress contact-form webhook intake
• Lead sharing across authorized users
• Lead pipeline statuses: NEW, CONTACTED, FOLLOW_UP, CONVERTED, LOST
• Lead temperature classification: HOT/WARM/COLD (time-driven)
• Lead notes with author and date-time
• Call log with date-time, duration, and summary
• Follow-up reports (1/2/3) with multiple entries support
• Timeline and activity history for auditability
• Conversion flow from lead to client and project

5. Client Management

The CRM will provide a centralized client module:

• Client master creation and maintenance
• Linkage from converted lead or direct onboarding
• Contact and profile tracking
• Client-to-project mapping

6. Project Management & Execution

Each converted or onboarded client project will support:

• Milestone-based project structure
• Task-level execution tracking
• Assignment, comments, and collaboration
• PDF document upload for task evidence
• Stage tabs with status indicators
• Automated progression logic based on task completion
• Project timeline with execution events
• Project process tracking panel for operational checkpoints

7. Project Process Tracking (Admin-Controlled)

The CRM will provide an admin-managed process-tracking section at project level, including:

• CTA shared date
• Inquiry forwarding date
• Milestone checkpoint dates (M1/M2/M3)
• Advance received date and amount
• Final invoice completion date
• Approx project and service values

All updates will be time-stamped and actor-tracked for reporting and governance.

8. Invoice Management

The CRM will include client/project-linked invoice operations:

• Step-based invoice creation and structured editing
• Standard line item based invoice structure
• Tax and discount handling
• Status tracking: DRAFT, ISSUED, PARTIALLY_PAID, PAID, OVERDUE, CANCELLED
• Payment entry logging (offline/online reference support)
• Dedicated invoice details page for full lifecycle operations
• Dedicated in-app invoice PDF page (with back navigation context)
• In-app PDF controls: zoom, reset, rotate, and download
• Professional invoice PDF generation with table-safe layout and wrapped line-item descriptions
• View and download invoice PDF

9. Notifications & Live Activity

The system will include collaboration support through:

• Browser notifications
• Live activity feed (admin always visible)
• User live-activity visibility controlled by admin setting

10. Access Control & Security

The CRM will enforce enterprise-grade access discipline:

• JWT authentication
• Role-based controls (Admin/User)
• Module-level access assignment by admin
• Sidebar and route visibility based on assigned modules
• API-level permission checks
• Report endpoint visibility restricted to authorized admin scope

11. Audit & Reporting Readiness

The solution will be built with long-term reporting and compliance readiness:

• Structured data capture across modules
• Timeline and actor tracking
• Audit logs for critical actions
• Data model extensibility for future reports such as:
• Response time analytics
• Conversion and communication statistics
• Stage-wise execution performance
• Revenue/invoice realization tracking

12. Scalability & Future Expansion

The platform will be designed for modular growth.

Future modules can be added without reworking core workflows, including:

• Advanced reporting and exports
• Configurable workflow engine
• SLA and escalation matrix
• Finance and reconciliation extensions
• Broader integration suite

13. Deliverables

The CRM delivery will include:

• Web application (frontend + backend)
• Database models and business workflows
• Admin settings and access controls
• Documentation and operational guidance
• Deployment-ready environment placeholders
• Enterprise workflow pages for list -> detail -> PDF navigation journeys

14. Outcome

Amplus CRM will provide a structured, controlled, and scalable internal operations system that improves execution discipline, visibility, and decision-making across the full business journey from inquiry to project closure and billing.