**The General Idea:**

What we want to do is make a contact list with notes for each contact and a calendar with tasks and reminders.

The crm will have one admin, one manager and staff. The admin will have full rights and the Staff should be able only to view and add contacts notes and tasks, view and use the calendar. The staff mustn’t be able to add or erase staff members and download/export anything. The manager can do everything that a staff member does and be able to download and export anything.

**Sidebar:**

At the sidebar the only things shown are the

Contacts (Customer at the default layout)

Regions (Groups at the default layout)

Tasks

Calendar

**Contacts**

**Contact List:**

Customers should be renamed Contacts

Fields: First Name, Last Name, Phone, Mobile Phone, Region, Street, Number, Zip Code, Kind of Building, Floor, Apartment Number, Options

\* Region field is the Group on the default layout

\*\* The contact list by default should show all the contacts and sort them alphabetically by Last name

\*\*\* Options remain the same as on the default layout

\*\*\*\* All contacts should be considered Active

\*\*\*\*\* Filter only by Groups (which will be renamed Region)

**The Single Contact (the one that open when you click on a contact)**

(Single Customer on the default layout)

Its sidebar should have Profile, Notes, Tasks, Map

Profile: It should have the contact details the same as the ones in the Contact List (customer details at the default layout)

\* Billing and Shipping, Contacts, Customer Admins should be deleted

Notes: Description, Added From, Date Added, Options

Tasks: Related to contact only! (Customer at the default layout)

New Task: Subject, Start Date, End Date, Repeat Every, Contact (Customer at the default layout), Reminder, Task Description

\*we need to be able to set a reminder for each task

\*\*The task should be related to contact (Customer at the default layout) by default and not be shown

**New Contact (the one that opens when you click on new customer which will be renamed new contact)**

Fields: First Name, Last Name, Phone, Mobile Phone, Region, Street, Number, Zip Code, Kind of Building, Floor, Apartment Number, Latitude (Google Maps), Longitude (Google Maps)

\* Region is the groups of the sidebar

\*\* We only need the customer details which will be named contact details

\*\*\* Save and create contact should be renamed save and create contact

**Regions:**

Groups should be renamed Regions

All regions should be considered active by default

Fields: Name and Options

\*The order should be alphabetical by default

**New Region**

New Group should be renamed New Region

Region Name, Color and Short Description

**Tasks:**

Fields: Name, Start date, Contact, Options

New Task: Subject, Start Date, End Date, Repeat Every, Contact (Customer at the default layout), Reminder, Task Description

\*we need to be able to set a reminder for each task

\*\*The task should be related to contact (Customer at the default layout) by default

\*\*\* All tasks should be assigned to all users automatically.

Filters: Todays Tasks, Tomorrow’s Tasks, Weeks Tasks, Months Tasks, Tasks that are repeated

**Calendar:**

All tasks added by all users from all places (from inside a contact or from Tasks at the sidebar) should be shown at the Calendar

Add new Task

When someone clicks on the calendar by default it opens Add new event.

That should be changed to add new task

New Task: Subject, Start Date, End Date, Repeat Every, Contact (Customer at the default layout), Reminder, Task Description

**Please, keep in mind, that we want to white-label the CRM and also localize it in Greek.**