CRM Scope-in

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1. Lead & Contact Management

- **Lead Capture**
  - Web form embedding (JS widget / iFrame)
  - Facebook & Google Ads webhook ingestion
  - WhatsApp & chat-widget ingestion
  - Manual import (CSV/XLS)
- **Lead/Profile Records**
  - Personal details (name, email, phone, social links)
  - Transaction intent (buy/sell/rent), budget, timeline
  - Preferred locations, property types, amenities
  - Custom fields (e.g. “financing status,” “referral source”)
- **Lead Lifecycle**
  - Configurable pipeline stages (New → Contacted → Tour → Offer → Closed → Lost)
  - Drag-and-drop Kanban view
  - Automated stage progression rules (e.g. move to “Follow-up” after X days)
- **Lead Enrichment & Scoring**
  - Auto-enrich from social & data providers (Clearbit, Zillow API)
  - Scoring model (AI-powered “hot” vs. “cold”)
  - Duplicate detection & merge suggestions
- **Activity Timeline**
  - Call logs, emails, SMS, WhatsApp messages, notes
  - Document uploads (ID, KYC)

- Custom tags & pinning

2. Property & Listing Management

- **Property Records**
  - Address (map integration), area (sqft), BHK/rooms, type (apartment, villa, plot)
  - Price, possession status, availability dates
  - Owner/seller contact & commission structure
- **Media & Docs**
  - Photo gallery with bulk upload & auto-resize
  - Floor plans / site plans (PDF)
  - 360° virtual tour / video embed
- **Search & Match**
  - Advanced search filters (price range, number of bathrooms, furnishing)
  - Auto-match engine: suggest listings to leads based on preferences
  - Saved search alerts for leads (email/WhatsApp)

3. Deals & Transaction Tracking

- **Deal (Opportunity) Records**
  - Link lead ↔ property
  - Deal value, expected close date, source
  - Transaction type (sale/rent), payment schedule
- **Milestones & Workflows**
  - Preconfigured deal stages (Offer → Inspection → Legal → Payment → Handover)
  - Task auto-creation at each stage
- **Commission & Financials**

    - Commission calculation rules (fixed %, tiered)
    - Payout status & history
    - Invoice generation & PDF export

4. Tasks, Reminders & Calendar

- **Task Management**
    - Create/edit tasks (calls, site visits, document collection)
    - Assign to agent/team member
    - Priority flags, due dates, recurrence
- **Reminders & Notifications**
    - Email, in-app, web-push, SMS, WhatsApp reminders
    - Snooze, escalation (e.g. manager alert if overdue)
- **Calendar Integration**
    - Google/Outlook two-way sync
    - Color-coded event types (lead calls, site visits)

5. Communications Hub

- **Email**
    - SMTP integration (SendGrid, Mailgun, Gmail API)
    - Templates with merge-fields, A/B test support
    - Tracking (opens, clicks)
- **WhatsApp & SMS**
    - Business API integration (Twilio / 360Dialog / Gupshup)
    - Template & session messaging
    - Chat history embedded in lead timelines
- **Phone & VOIP**

  - Click-to-call (Twilio Client)
  - Call recording & transcription
  - Call analytics (duration, number of calls)
- **Live Chat Widget**
  - Website-embedded chat, auto-capture to CRM
  - Bot-driven triage (FAQ, lead qualification)

6. Analytics & Reporting

- **Standard Dashboards**
  - Lead funnel (conversion rates per stage)
  - Source performance (Ads, referrals, organic)
  - Agent leaderboard (deals closed, revenue)
- **Custom Reports**
  - Report builder (drag-and-drop metrics/dimensions)
  - Scheduled exports (CSV, PDF)
- **Forecasting & Insights**
  - Sales pipeline forecast (expected revenue by month)
  - Churn risk & lead health scores
  - AI-driven suggestions (e.g. “Re-engage Lead X”)

7. AI & Automation

- **Workflow Builder**
  - Visual rule editor (if → then → actions)
  - Prebuilt recipes (welcome sequence, post-visit follow-up)
- **AI-Assisted Drafting**
  - GPT-4o integration for email/WhatsApp drafts

- Smart follow-up nudges (“It’s been 3 days since last contact…”)

- **Predictive Matching**
  - Recommend top 3 listings per lead
  - Predict deal close probability

8. User & Access Management

- **Roles & Permissions**
  - Admin, Manager, Agent, Read-only, Custom roles
  - Feature-level access control
- **Team & Office Hierarchy**
  - Multi-office support with data partitions
  - Lead/Deal transfer across teams
- **Audit Trail**
  - Record create/update/delete logs with user & timestamp

9. Settings & Configuration

- **Custom Fields & Pipelines**
  - Admin UI to add/edit fields on Lead, Property, Deal
  - Configurable pipeline stages & labels
- **Notification Preferences**
  - Per-user channel opt-in/out (email/SMS/WhatsApp)
- **Branding & White-Label**
  - Custom logo, domain (CNAME), color theme

10. Integrations & APIs

- **Third-Party Portals**
  - Auto-post listings to 99acres, Magicbricks, Zillow, Realtor.com

- **Marketing Tools**
    - Facebook/Google Ads reporting sync
    - Mailchimp, HubSpot integration
- **Accounting & Docs**
    - QuickBooks/Xero sync for invoices
    - DocuSign/eSign for contracts
- **Public API / Webhooks**
    - CRUD endpoints for external apps
    - Event webhooks (new lead, deal won)

11. Mobile & Offline

- **Responsive Web App** (PWA)
- **Native Mobile App** (iOS/Android)
    - Offline access & local caching
    - Push notifications

12. Non-Functional Requirements

- **Scalability**
    - Horizontal scaling; DB sharding or partitioning for >1M records
- **Performance**
    - <200 ms page load for dashboard
    - <500 ms search queries on 100k+ leads
- **Security & Compliance**
    - Role-based access, two-factor authentication
    - Data encryption at rest & in transit (TLS)
    - GDPR/CCPA controls (data export, delete)

- **Reliability**
  - 99.9% uptime SLA
  - Automated backups & 24h retention

📦 Tech & Deployment Suggestions

- **Frontend**: React/Next.js + Tailwind
- **Backend**: Node.js/Express or NestJS
- **DB**: PostgreSQL + Redis cache
- **Search**: Elasticsearch or Postgres FTS
- **Hosting**: Kubernetes (self-host) or managed (Vercel + Railway)
- **CI/CD**: GitHub Actions → Docker → Kubernetes
- **Monitoring**: Prometheus/Grafana + Sentry
