1. Login

Login with google,facebook,create login with email.

Login roles –

* Super admin
  + To log in to the platform
  + It will be used to create companies/subscribers to the platform
  + It will be used to setup company subscriptions/settings for twilio and email settings
  + There will also be a company setting page that super admin can do changes to
* Company admin
* Company user/roles etc

Create Account/Company

* Superadmin can create multiple accounts, invite them to their email address or simply use an email address to sign customers up from the backend.
* When superadmin creates a company there has to be a way to enter a customer's credit card for payments and signup for a specific plan.
* Customers can also use this feature to sign up directly providing their credit cards online and do a self-signup. We will use stripe for payment processing.

<https://knowledge.hubspot.com/account/how-can-i-update-my-company-and-billing-info>

1. Login with company admin

* Customers can login with their account and look at the dashboard. Dashboards need to be designed and should show what they are doing on the platform. Number of contacts, email sent, sms sent etc.
* There will be a setting section to set properties of the company.
  + To set twilio api integration
  + To do email smtp integration, mx record update, verify mx record etc. <https://knowledge.hubspot.com/email-tracking/connect-your-inbox-to-hubspot>
  + Create key value pairs per company. This is just properties that need to be set for future use.
* Menu will have section for Marketing -> Email, Marketing ->SMS, Marketing -> Contacts

1. Contacts Menu

* Company can create/edit/delete contacts
* Option to upload/import list of contacts via excel file upload
* After upload user can select field of excel to match with default contact properties, or assign to a new property
* If contact already exists it should be updated, if it does not exist it should be created after the upload.
* Email should go after the upload job is finished.
* Contact properties: <https://knowledge.hubspot.com/contacts/hubspots-default-contact-properties>
* Contact properties are just database fields (default) which can be created additional by company if need be.

1. Contact Lists

* Customers can create a list of contacts. List is just a group of contacts. Multiple lists can be created

<https://knowledge.hubspot.com/lists/add-or-remove-contacts-from-a-list>

* List import/export should be possible. Import/Export format should be xlsx.

1. Create Email – please follow the marketing tab in hubspot. Mostly all features are needed even if not listed below. Below are just a handful of important features.

* The dashboard should show list of all previous emails sent
  + User can clone a email to copy all email and settings
  + List of emails should show reportings of email performance, open rate, how many were sent, etc see more after login to hubspot
* User can start creating an email
* Select template or create a blank email
* Use editor to build beautiful email

<https://knowledge.hubspot.com/email/create-marketing-emails-in-the-drag-and-drop-email-editor>

* email should allow personalization in content as well as in subject lines. <https://knowledge.hubspot.com/email/how-do-i-personalize-the-subject-line-of-my-email>
* design email footer
* provide unsubscribe links. If the end user unsubscribes the email it should go to the un-subscription list so no future emails are sent.
* Send or schedule
  + Send email now or schedule email sent option
  + Send email to single contact, or multiple contact, to a list etc
  + Allow the option to not send email to a specific list of contacts.
  + Show estimated recipients
  + Send test email – just to few email address rather than list of contacts to test how email looks
  + Preview email
* Email settings:
  + From name
  + From address
  + Subject line
  + Preview text
  + Internal email name
  + Language

1. Create SMS
   1. This will be similar to email creations with reports needed.
   2. Will be much simpler with editor options.
   3. Similar send sms to list of contacts
      1. Similar to the email send/schedule section.
2. Documentation

* Source code should be well documented.
* There has to be instructions on how to run/deploy/compile source code
* Reusability is key, reuse/structure code as well as possible
* Will use private github to host the code
* There is no code ownership from freelancers.
* Source code needs to be checked in at least on a weekly basis

Milestone & Payments

1. Create design/approve designs/demonstrate workable html’s– 5%
2. Section 1 & Section 2 – 20%
3. Section 3 & Section 4 – 25%
4. Section 5 – 20%
5. Section 6 – 10%
6. Section 7 – 10%
7. Final approval & handover – 10%