Roadmap

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Roadmap

Delivered and planned work for the omnichannel multi-tenant CRM.

Delivered

Milestone	Summary
Core CRM	Customers, leads, tasks, reports, users/roles, CSV, reminders
Multi-tenancy	Company scope, plans/limits, Super Admin companies
Super Admin platform	Plans, analytics, email templates, contact inquiries, impersonation
M1 Channels engine	Tables, ingestion, jobs, lead matching, generic adapter
M2 Channels UI	Tenant connect/test/sync/disconnect + public webhook URL
M3 Facebook Lead Ads	Meta verify, signatures, Graph lead fetch → CRM leads
WhatsApp Cloud	Inbound messages, verify, connection test
Inbox + WhatsApp reply	Conversation UI, assign/status, Graph send
Docs suite	This `/docs` tree
AI foundation	Provider abstraction, usage logs, tenant-safe context
Ask Algos	Natural-language CRM search via allowlisted Eloquent filters

In progress / hardening

- Per-tenant Meta App Secret storage (today `META_APP_SECRET` is largely platform `.env`, with connection secret fallback)
- OAuth “Connect with Meta” instead of pasting tokens
- CI workflows in-repo (**Recommended**)

Planned channels

Provider	Priority notes
Instagram Lead Forms	Reuse Lead Ads patterns
Facebook Messenger	Inbox parity with WhatsApp
Instagram DM	Messaging + Inbox
Website Forms builder	First-class forms vs legacy website webhook
Public API	Versioned REST + API keys

Planned product

Item	Notes
Rich media in Inbox	Images/docs beyond text placeholders
WhatsApp template messages	Business-initiated outside session window
Delivery receipt updates	Apply status webhooks to stored messages
Realtime Inbox	Echo/Reverb or polling
OpenAPI docs	When REST API lands

Suggested build order

1. Stabilize WhatsApp production (tokens, ngrok/prod HTTPS, monitoring)
2. Instagram Lead Forms
3. Messenger / Instagram DM
4. Website Forms builder
5. Public REST API

Related

- Channels overview
- Changelog
- CI/CD