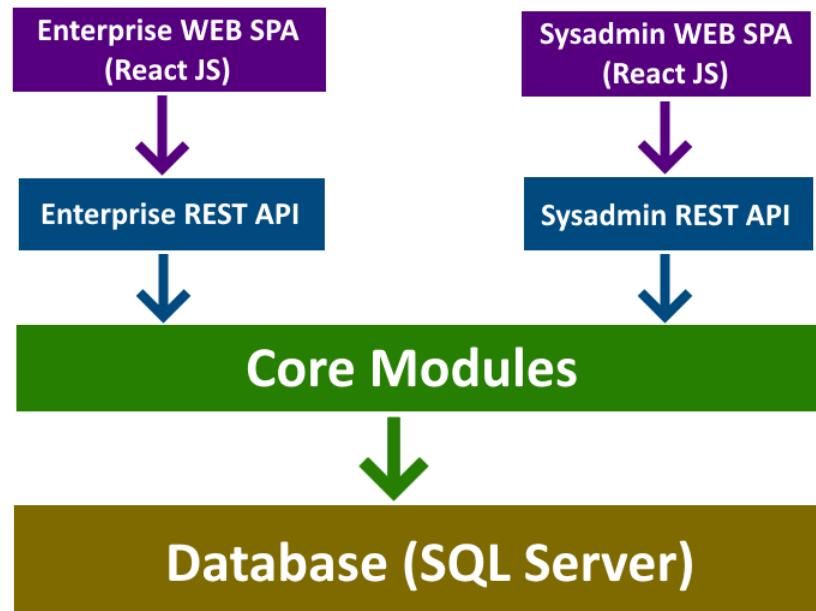


CRM Platform

Architecture of the CRM Platform



Main features of the CRM Platform for the MVP version

1. The platform must be implemented as a **SaaS** application for enterprise customers (other companies) with a **multitenant** architecture (meaning that a single instance of the application can be used by multiple customers). This is a crucial capability for an application that will be deployed in a Cloud architecture.
2. The platform must allow the management of an unlimited number of environments, each environment representing a private workspace where a customer (company) will keep their data.
3. The platform must allow the management of users with different roles (administrators and normal users) within an environment. A user is an employee of a customer (company) that can have administrator or normal privileges inside an environment.
4. For the MVP, the platform must allow the management of contacts and accounts inside of an environment. **Contacts** and **Accounts** are representing the clients of the company that is using the CRM Platform.
5. The platform must allow communications using a configurable SMTP service, so the platform can send emails to users when a new environment is created, a password was changed, etc...

Some of the requirements that the platform must implement for MVP

1. A **sysadmin** user must be added by default when the platform is deployed and configured for the first time.
2. The platform must provide a ‘Sysadmin’ website where a sysadmin user can authenticate and manage the environments.
3. A **sysadmin** user must be able to edit its own profile: change password, change first and last names, change the email address.
4. A **sysadmin** user must have the ability to reset its password.
5. A **sysadmin** user must be able to create, edit and delete an environment.
6. A **sysadmin** user must be able to disable an environment (I add this as a special requirement because it is a particularity of a SaaS application, when you want to prevent clients for using their environment in different scenarios).
7. When an environment is created, an **enterprise** user with administrator rights must be created in the environment. At that moment, the platform must send an email to this new user with login credentials.
8. The platform must provide an ‘Enterprise’ website where **enterprise** users can authenticate and manage the content of the environment: other users, contacts and accounts.
9. An **enterprise** user with administrator rights must be able to create, edit or delete other users with or without administrator rights.
10. An **enterprise** user must be able to create, edit and delete accounts.
11. An **enterprise** user must be able to create, edit and delete contacts.
12. An **account** can have another account as its parent. For example: You can create an account for the Toyota Company and two other child accounts named Toyota F1 and Toyota Motorsport.
13. A **contact** can have one or more associated parent accounts.

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