Project Title: CRM for Workshops & Courses

Document Title: Software Requirements Specification

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1. INTRODUCTION

1.1 Purpose

This document provides a comprehensive specification for a CRM system designed to manage and execute technical workshops and courses, including workflows for sales, marketing, tech, and admin teams.

1.2 Scope

The CRM facilitates lead generation, proposal management, teacher recruitment, workshop execution, billing, and post-workshop feedback. It serves educational institutions and internal team users.

1.3 Definitions, Acronyms, and Abbreviations

- CRM: Customer Relationship Management

- MoU: Memorandum of Understanding
- UI/UX: User Interface / User Experience

1.4 References

- CRM Structure.pdf (internal project planning document)
- GitHub Repository: https://github.com/Tanbir5125/CRM

1.5 Overview

This document outlines the overall system design, core modules, workflows, and prioritization of features using the MoSCoW method.

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2. OVERALL DESCRIPTION

2.1 Product Perspective

This CRM is a web-based internal platform supporting workshop management by integrating sales, marketing, technical, and admin functionalities into modular dashboards.

2.2 Product Functions

- Lead management
- Proposal generation and tracking
- Teacher recruitment and coordination
- Workshop curriculum management
- Billing and approval workflows
- Feedback collection and CRM analytics

2.3 User Classes and Characteristics

- Sales Team: Handles leads, pricing, and communication
- Marketing Team: Enhances proposals, recruits teachers
- Tech Team: Develops curriculum and manages execution
- Admin Team: Approves and monitors finances
- Educational Clients: Proposal recipients and feedback providers

2.4 Operating Environment

- Web-based application
- Cloud file storage
- Mobile access supported for field reps

2.5 Constraints

- Secure storage for sensitive data (MoUs, feedback)
- Role-based access control

2.6 Assumptions and Dependencies

- Institutions use email/WhatsApp for proposal communication
- Internet access for all CRM modules

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3. SPECIFIC REQUIREMENTS

3.1 Functional Requirements

- Lead entry and prioritization
- Proposal drafting with templates
- Curriculum upload and management
- Teacher selection and scheduling
- Order lifecycle status tracking
- Feedback collection

3.2 Non-Functional Requirements

- Scalability
- Secure authentication and access control
- Responsive mobile-friendly UI
- Automated notifications and reminders

3.3 Interface Requirements

- Email, WhatsApp integration
- Google Calendar, Zoom APIs
- Payment Gateway APIs

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4. DESIGN OVERVIEW

4.1 System Architecture

- Modular dashboard architecture

- RESTful API-driven backend
- MongoDB database

4.2 Component Design

- Sales Module
- Marketing Module
- Tech Module
- Admin Module
- Shared Services: Notification, Auth, Storage

4.3 Data Design

- User, Order, Proposal, Feedback, Payment schemas

4.4 Interface Design

- React frontend with form-based dashboards
- Cloudinary for media uploads

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5. TEST PLAN

5.1 Test Environment

- Local and staging servers
- Postman for API testing

5.2 Test Cases

- Login and role-based access
- Lead creation and proposal flow
- Execution status tracking
- Feedback form submission

5.3 Bug/Issue Tracking

- GitHub Issues / Trello board

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6. USER DOCUMENTATION

6.1 Installation Guide

- Clone from GitHub, install dependencies, run via `npm start`

6.2 User Guide

- Dashboard walkthrough for each team
- How to send proposals, upload content, and finalize deals

6.3 Troubleshooting

- Cannot upload: Check Cloudinary config
- Cannot login: Check role permissions

6.4 FAQs

- How do I assign a teacher?
- How to check workshop status?