

United Legal Group

UNITY CRM

Software Requirements Specifications

Version 1.0

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# Part I – Application Overview

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| --- | --- | --- | --- |
| Name | | **UNITED LEGAL GROUP– UNITY CRM REQUIREMENTS** | |
| **Date** | | **21/07/2021** | |
| **No** | **Deliverables from UNITY CRM System** | |
| **1** | **Scope:** United Legal Group (ULG) uses quite a number of third-party systems for various operations. The objective of Unity is to therefore have a CRM with all the functionalities that ULG desires. The CRM will be used for various business processes as listed below.   1. Management of client accounts (From leads to clients). 2. Management of debtor accounts. 3. Facilitate seamless communication within the organization. 4. Facilitate elaborate communication with other parties involved in the business processes (debtors, clients, etc.) 5. Allow team leaders to monitor agents performance. 6. Generate specific reports i.e revenue, performance, clients, etc. 7. Generate monthly status reports for the company and automatically emailed to given user groups. 8. The CRM should be scalable to include more features in the future. 9. Data Upload format to the CRM will be csv, xlsx. | |
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| **2** | **User Access Levels/ FUNCTIONS**  **Categorize the user levels to;**  **Super Admin**   * Manage user department access * Edit company information – Adding Client referral fees * Create other Super Admins * Do everything admins are capable to do * Set up user department pre-set access * Give specific access to certain Admins/Users (include reset button) * Create new departments * Include password recovery   **Admin**   * Upload and manage leads * Manage agent Targets * View & Download Reports * Create/Read/Update/Delete [CRUD] operations  1. Call scripts 2. Edit Debtor accounts – Client info/debtor info/phone numbers/address etc. 3. Edit and add Clients – Have box for adding creditor for all accounts. 4. Restrict User Departments 5. Users 6. Teams 7. Queues 8. Credit reporting \* 9. Account automations \* 10. Communicating with anyone on the account, Attorney, client, debtor 11. Billing, Allocating Funds 12. Distribution of accounts 13. Editing, importing, exporting (Bulk) 14. Set up templates – Create and edit and send emails and PDF/Word Templates Mail merges and client documentation 15. Create and edit actions codes 16. Add Remove Doc folders 17. Add edit Custom Fields 18. Add edit collection status and phone description 19. Bulk account manager 20. View download and create reports 21. Add brand new account 22. Create username for clients 23. Add and edit default columns for filter results 24. Edit and delete notes 25. Add reminders for whole departments   **Agent/Collectors/Marketing team**   * View the leads assigned * Access the Call Script * View their performance. * Use dialer to make calls * Add notes * Add reminders for individuals * Add action codes to the account * Selectively change account details, not in bulk. * Send information to help desk * Take payment /set up post date payments / Set up payment plans | |
| **3** | **Customized Reports**  **System Dashboard Report**   * A summary of the above Reports in a Dashboard * Set up which specified report shows on the dashboard   **Automated Reports**   * Automate the above Reports to send via emails as required.   **Report Builder**   * Generate custom reports   + This includes everything within report builder in simplicity   + Have Reports based on specific User groups/Departments   + Report restrictions to each user/department | |
| **4** | **File attachments, Templates and Mail Mergers**   * Create and edit word documents with mail merge fields based on the all fields within Unity * Email templates with mail merge * Word templates with mail merge * Adding attachments to emails – Includes pdf templates, client documents, Account documentation | |
| **5** | **Database Design**  A custom database is required for the CRM | |
| **6** | **CRM System Features**  The system shall have the following features as requested by ULG   1. **Debtor accounts**  |  | | --- | | Assign accounts to agents | | history of what has been done with the account | | Editing accounts in Bulk | | Bulk import and export | | Delete bulk accounts | | Search accounts with criteria | | Add new accounts | |  | | Report accounts to the credit bureaus | | Link accounts to each other | | Add Co-debtor(s) | | Automatically track how much time has been spend on an account | | Categorize account as either commercial or consumer account | | Auto count age of account submitted into system | | Add unlimited phone numbers with ability to set status on phone numbers | | Medical or Non-Medical Account |  1. **Notes**  |  | | --- | | Notes with different categories. All, Debtor, Account, Finances, Documentation, Recording/Calls, Emails | | Set preset notes and automatic notes | | Action Codes\* |  1. **Action codes**  |  | | --- | | Set action codes on various objects in the system | | Search filters should be able to be base on this action codes | |  | |  | |  1. **Chat arena**  |  | | --- | | Company Chat room | | When Each account has a help button which anyone can click. When created, it will grab the account number and create a chat room discussing that account so that whoever is messaged can easily access mentioned account.  Chat room will be separate from the account and can direct message or have a group chat with multiple people. Can add and delete people from the group chat.  Everything will be recording and admin and super admin have access to everyone’s chat. Super admins will be the only ones to be able to delete and edit chat.  Should be able to attach documentation to chat, PDF, .MOV, ecl, etc.  Within a chat with multiple people, you are able to PM (personal Message) someone else (department restricted)  Add people to chat room  and chat, the chat group will be saved in the notes for each specific account if they are talking on an account.  Also automatically saved in the doc folder on all chats.  Include clocking and clocking, Break, lunch, away from desk – Send automatic message to specific group (Set by admins) This records the time that an email is in and out and creates time sheets.  Clock in and clock out Restricted based on departments)  Add new employees, (when adding new employees, automatically track start date) delete new employees (automatically track termination date) (Individually or in bulk)  Terminating an account does not delete the account, only deactivates it.  Each employee file has the following:   * First and last name * Address * Phone number * Department * Location * User Group * Hourly wage * Benefits (Paid time off, sick pay, vacation time) \* * See who is in and who is not in. Also able to clock other users in and out. * Edit time sheets * Set up usernames and passwords * Edit start date and termination date * Add DOB * Add Social Security Number * Employee has a doc folder where we can store documentation (Separate Doc folders) Employee cant log into the system until all folders have documentation |  1. **Emailing**  |  | | --- | | Mail Merging Documents | | Hyper link on emails | | Click to email on emails |  1. **Dialer and call management**  |  | | --- | | Scripts | | Inbound and outbound emails will be saved automatically in the doc folder. | | Any inbound calls, the system will recognize the phone number and pull up the account or accounts | | Click to dial on phone numbers | | Attach call recordings to the account automatically | | Automatically notate which phone number was called | | Fax clients | | If a duplicate phone number added, notify user of where it has already been added and ask if okay to add | | Call recording Server to easily pull call recordings, Bulk account call recording based on custom criteria | |  | |  |  1. **Client management**  |  | | --- | | Client chat to contact us immediately | | Setting up Debtors for Active Clients. | | Set up Client account so any account that is assigned under the client will follow all | | Setting up Client login to submit accounts |  1. **User accounts**  |  | | --- | | Restrict IP login address | | Create queue's for users | | Users + Restriction capabilities | | User groups | | Employee log in, admin has each employee file to attach documents, set up date of birth ssn w-2, hire date,  termination date.  Notifies User groups if its someone's Birthday | | Bulk editing employee details [assign user group] | | Clock in and clock out for users | | User Group showing on the account | | Restrict certain actions based on # of phone numbers call on an account within one day, or time restrictions |  1. **User interface**  |  | | --- | | Editable interface, add tabs and fields | | Dashboard showing different tabs to click on to navigate the website easier | | Detail and list view of accounts | | Headers for customer search - list of accounts is editable | | able to navigate left and right based on the list looked up |  1. **Reminders/notifications**  |  | | --- | | Put a reminder off for 10 minutes(snooze) | | Task list of up-coming to-do list | | Set up follow up dates and times, for different users | | Statute of limitations automatic reminder based on states\* | | Reminders for user groups of people rather than just one |  1. **Reports**  |  | | --- | | Performance report | | Send automatic monthly status reports | | Monthly status reports for the company automatically emailed to user groups |  1. **Customization and system set up**  |  | | --- | | Create Look up configurations | | Adding debtor accounts to the system, this includes customizable tabs and fields | | Automations | | Add Addresses with ability to set status on address | | Automations: more options, Automation based on Action codes, time not touched accounts, assign to a User in a user group Randomly, Medical non-medical, consumer, commercial accounts. |  1. **File manager**  |  | | --- | | Add different folder for each account | | Send client emails with mail merge templates | | Send Debtor emails with password protected documents | | Auto generate word or pdf document invoices based on client |  1. **Finance**  |  | | --- | | Calculate interest to the balance | | Post-date payments | | Change the amount for the individual account of how much % We get from the amount collected  Allow for different percentages on different accounts for same client.  Billing | | Set up the % we get from the principal amount, interest, costs, and how much the attorney receives | | Take a payment, set up payment plans | | Accounting tab to show what checks have been printed or not | | Financial tab, when taking a payment make a process where we can tell the system that the client got paid a certain amount and when we bill the client for our portion we are allowed to say that from that portion we are supposed to get paid this amount, and when we actually get paid we are able to notate that we got paid a certain amount. | | Connect to Quick Books |  1. **Legal**  |  | | --- | | Assign accounts to attorney | |  |  1. **Sales and marketing functions**  |  | | --- | | Be able to classify leads as cold, warm or hot | |  | |  | | |
| **7** | **User Training**   * Team leaders * Agents * Marketing Team * Administrators   Admin User Training (Call Center Team Leader & Marketing Team) | |
| **8** | **Documentation**   * Technical Documentation – CRM Flow Chart * CRM System Requirements Specifications (SRS) including hard coding   **Functional Documentation**   * User manual | |
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## Performance

The tool will be optimized in terms of network uptime and downtime, accessibility and data load.

# Part III – Dependencies

* + - Upload Template Format (for document mapping).

## Third party systems

1. 8x8 dialer – Phone number, Video meetings, Conference calls, Call recordings, Fax, transfer calls, Call routing.
2. Zoom (click) dialer (PAM)
3. Act CRM
4. Simplicity
5. Quick books
6. Dolphin (Power dialing) Progressive Dialing
7. Credit bureau systems
8. Tiger ( Email Campaigns)
9. ULG website

## Dependencies

1. SMTP Server (ULG account).
2. Database server

**Risks**

1. SMTP Server Uptime (ULG account [Low Risk].
2. Database server (UNITY database)-> High risk. Maximum security required.

Hereby Operations have agreed the scope of the work for the

Supply, Delivery, Installation and Commissioning of Unity tool for Techno Brain

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| --- | --- | --- |
| Newish Koech | Barat Makani | Chris Motari |
| Sign:  Quality Lead | Sign:  Head of Operations | Sign:  Lead developer |

Approvals and Authorizations

| Ver. No. | Ver. Date | Prepared By | Reviewed By | Review  Date | Approved By | Affected Section & Summary of Change |
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