



| PWA Requirements

New Requirements


Companies

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- Ability to store company details, including business name, address, industry, size, and contact details.
 - Each company must have at least one primary contact.
 - Categorisation of companies as prospect or customer.
 - Ability to assign internal users to manage the relationship of companies.


Contacts

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- Ability to store individual contact details, including name, job title, email, phone number, and associated companies.
 - A contact can be associated with one or more companies or exist independently without a link to any companies.
 - Ability to mark a contact as a primary contact for a specific company.

Leads

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- Leads are created when there may be a current or future opportunity to provide a quote to a company.
 - Each lead must be associated with a company and may also be linked to a specific contact.
 - Status tracking for leads (e.g., In Progress, Won, Lost).
 - Ability to assign internal users to manage leads.


Quotes

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- Quotes are generated for leads when a pricing estimate is provided.
 - Standard fields for quotes, including quote number, date, associated company, contact, and lead etc.
 - Ability to add line items to quotes, including description, quantity, price per unit, and tax code. Software needs to calculate and display the total and any tax.
 - Ability to amend and resend quotes.
 - Status tracking for quotes (e.g., Draft, Sent, Accepted, Rejected).


Invoices

- An invoice is created when a quote is won


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- The invoice will initially contain the same line items as the corresponding quote but must be editable so that it can be different to the quote.
 - Standard fields for invoices, including invoice number, issue date, due date, and payment terms.
 - Ability to add and edit line items like quotes.
 - Status tracking for invoices (e.g., Draft, Sent, Partly Paid, Fully Paid).


Payments

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- Ability to record one or more payments against an invoice.
 - Calculation of outstanding balance on each invoice.
 - Automatically change the status to paid when payments are equal to the invoice total.


Reporting

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- Users must be able to generate reports for Companies, Contacts, Leads, Quotes, and Invoices.
 - Reports should be filterable by date, status, company, or other relevant fields.
 - Ability to export reports to formats such as CSV or PDF.

User Management & Security

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- Each business subscriber will have its own internal users.
 - Role-based access control to restrict functionalities based on user roles.
 - 2-factor authentication for all users.
 - Secure login system with password recovery options.

Additional Considerations


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- The CRM will be web-based and must support access from different devices.
 - The user interface should be intuitive and easy to navigate.
 - The system should be scalable to handle multiple businesses efficiently if we decide to make it a SaaS product.
 - Data security and encryption should be implemented for sensitive information.

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Reasoning for Requirements

In response to the requested requirements for the Progressive Web Application (PWA), this document outlines the updated specifications and features to be implemented. All requested requirements have been reviewed and included, except for the integration of Stripe and the Xero API, which have been excluded based on current project considerations. The updated requirements ensure the project will be finished on time with also being polished.

Sign off Requirements

 01/04/25
