

User stories

Updated 23/9/21 - added user stories in purple

As a <ROLE>	I want to <do something>	So that <achieve some goals>	Priority
User	Store Customer Information	I know details about which customers I have worked with.	HIGH
User	Login to CRM using password	My CRM is secure and safe.	HIGH
User	Search for customers	I can find any customer that I need, past or present.	HIGH
User	Store Company information for customers	I get a structured view of my customers.	HIGH
User	Track progress and priorities	I am able to see which areas I am lacking in and which areas I can improve on.	HIGH
User	Be able to get notifications for client contact	I am aware of which tasks I am behind on.	MEDIUM
User	Be able to filter by progress and priority in search	I know which tasks are nearly done and which tasks need to be delivered urgently.	MEDIUM
User	Be able to log out of CRM	I can securely exit the CRM, preventing others from accessing it.	MEDIUM
User	Create a contact	I can easily add new clients as I wish and require.	MEDIUM
User	Edit my information	I can change my password, name or my email if needed.	MEDIUM
User	Switch to dark mode	I have better readability and usability of CRM in different settings.	LOW
User	Store profile photos for customers	I can familiarise myself with my customers.	LOW
User	Receive notifications for upcoming meeting days	I am reminded of upcoming meetings and their day & time	LOW
User	Be able to get notifications for lacking progress	I am aware of which task haven't made progress.	LOW

User	Have ordering in my CRM based on customers & their creation date, last contact date, and longest time without progress	I can keep on top of my customers and my progress with them, referring to specific dates & times	LOW
User	Add other users to use CRM in future	I am able to collaborate with any colleagues or coworkers that may come on board	FUTURE