Software Requirement Specification Document

Project Title: In-House Client Onboarding Tracking Tool for Pretture

Company: [Your Company Name]

Prepared For: Internal Use – Implementation, Training, and Support Teams

Date: [Insert Date]

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1. Introduction

1.1 Purpose To streamline and track the onboarding process of clients using the Pretture ERP platform, this in-house software tool is being developed for internal teams: Implementation, Training, and Support.

1.2 Scope The tool will facilitate the onboarding process from initial customer registration by the Client Relationship Manager to post-go-live support by the Support Executive. It will support structured documentation, time tracking, communication logging, and workflow transparency.

1.3 Users - Client Relationship Manager - Implementation Manager - Implementation Engineer - Support Executive

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2. User Roles & Functionalities

2.1 Client Relationship Manager (e.g., Archana)

- Create a new customer profile with the following details:
  - Brand Name
  - Primary Contact Person (Name, Contact Number, Email ID)
  - Pretture Package
  - Pretture Login ID and First Password
  - Required Integrations
  - Date-wise discussion history before onboarding
  - Demo Recording URLs (supporting multiple rounds)

2.2 Implementation Manager

- Assign an Implementation Engineer to a new customer.
- Define and update stages for each onboarding project:
  - Stage Name
  - Due Date
  - Actual Start Date
  - Actual Completion Date

- Assign a Support Executive after 1 month of go-live.
- Access dashboard to:
    - View customers handled by engineers and support staff daily
    - Monitor productivity of engineers and support staff
    - Receive alerts for approaching or overdue implementation stages

2.3 Implementation Engineer

- Select list of required documents/data from the customer:
    - Shopify Product Master (CSV)
    - Other Products data
    - Bill-of-Material
    - Material Master
    - Photos of jobwork documents
    - Full data for 5 products (with images)
    - Vendor Data
    - Customer Data
    - Measurement Sheet
    - Brand Logo
- Tick confirmation on process explanation to the customer
- Daily progress log:
    - Long & Short Descriptions
    - Date, Start Time, Total Time Spent
    - Attachments and URLs
- Section for Questions & Answers with attachments/URLs
- Workflow understanding section with attachments/URLs
- Barcode sample photo uploads
- Training sequence creation:
    - “How To” List
    - Upload multiple video URLs per item with dates
- Practice session logs:
    - 5 Rounds with video URLs and descriptions
- Go-live strategy documentation
- Audit section for user adherence verification with multiple audit rounds, descriptions, attachments, URLs
- First-month go-live query tracker with explanations
- Personal dashboard for daily productivity summary

2.4 Support Executive

- Daily query tracker with:
    - Query description, response, date, time

    - Total time spent (in minutes)
    - Attachments and URLs
- Implementation/workflow change tracker:
    - Date-wise updates with descriptions, attachments, URLs
- Restrictions:
    - Cannot access or modify Implementation Engineer or Manager sections
    - Can only add, not edit or delete, in their own sections
    - Can add but not delete attachments/URLs
- Personal dashboard for daily productivity summary

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3. Access Control Rules

- **Support Executive:**
    - No access to Implementation Engineer or Manager sections
    - Add-only rights to their own sections
    - Cannot delete anything, including attachments/URLs
- **Implementation Engineer:**
    - No access to Implementation Manager sections
    - Add-only rights to their own sections
    - Cannot delete entries or attachments/URLs

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4. Dashboards

4.1 Support Executive & Implementation Engineer Dashboards

- Daily productivity summary by totaling time spent (in minutes) from daily update sections

4.2 Implementation Manager Dashboard

- View customers handled each day by Implementation Engineers and Support Executives
- Productivity metrics for both roles
- Alerts for due and overdue stages of onboarding projects

End of Document