**Software Requirements Specification (SRS) Document**

Customer Relationship Management (CRM) Software

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1. Introduction

1.1 Purpose

The purpose of this document is to specify the requirements of the Customer Relationship Management (CRM) software. It outlines the functional and non-functional requirements necessary to design, develop, and deploy the system.

1.2 Scope

The CRM software is designed to help businesses manage their interactions with current and potential customers. It includes features for contact management, lead tracking, sales pipeline management, communication, and reporting.

1.3 Definitions, Acronyms, and Abbreviations

- SRS: Software Requirements Specification

- CRM: Customer Relationship Management

1.4 References

List any references used in the creation of this document.

1.5 Overview

This document includes an overview of the CRM software, its features, user classes, operating environment, constraints, assumptions, dependencies, ethical perspective, and restrictions.

2. Overall Description

2.1 Product Perspective

The CRM software will serve as a standalone system accessible through web browsers and mobile applications. It may interface with external systems for email communication, lead generation, and sales automation.

2.2 Product Features

The key features of the CRM software include:

- Contact Management: Store and organize customer contact information.

- Lead Tracking: Track and manage leads through the sales pipeline.

- Sales Pipeline Management: Monitor and manage sales opportunities and deals.

- Communication: Communicate with customers via email, phone calls, and messaging.

- Reporting and Analytics: Generate reports on sales performance, customer engagement, and lead conversion.

2.3 User Classes and Characteristics

The system will cater to the following user classes:

1. Sales Representatives: Users responsible for managing leads and closing deals.

2. Sales Managers: Users overseeing sales teams and monitoring performance.

3. Administrators: Users responsible for system configuration and management.

2.4 Operating Environment

The system will be hosted on a cloud-based infrastructure and accessible through modern web browsers (Chrome, Firefox, Safari, Edge) and mobile applications (iOS, Android).

2.5 Design and Implementation Constraints

- The system must be scalable to accommodate a large number of users and customer records.

- Security measures must be implemented to protect customer data and communications.

- The user interface must be intuitive and customizable to meet diverse business needs.

2.6 User Documentation

Comprehensive user documentation will be provided, including user manuals, tutorials, and FAQs.

2.7 Assumptions and Dependencies

It is assumed that users will have access to a stable internet connection and modern computing devices to access the system. Dependencies may include third-party APIs for email communication, lead generation, and integration with other business systems.

3. Specific Requirements

3.1 External Interface Requirements

3.1.1 User Interfaces

The user interfaces shall be intuitive, responsive, and customizable to meet user preferences.

3.1.2 Hardware Interfaces

No specific hardware interfaces are required beyond standard computing devices with internet connectivity.

3.1.3 Software Interfaces

The system may interface with third-party services for email communication, lead generation, and sales automation.

3.1.4 Communications Interfaces

The system shall support communication channels such as email, phone calls, and messaging for customer interaction.

3.2 Functional Requirements

- Contact Management:

- Users can create, view, update, and delete customer contacts.

- Lead Tracking:

- Users can add leads, assign ownership, track lead status, and update lead details.

- Sales Pipeline Management:

- Users can create and manage sales opportunities, track deal stages, and forecast revenue.

- Communication:

- Users can communicate with customers via email, phone calls, and messaging directly from the system.

- Reporting and Analytics:

- Users can generate reports on sales performance, lead conversion rates, and customer engagement metrics.

3.3 Non-functional Requirements

3.3.1 Performance Requirements

- The system shall respond to user interactions within 2 seconds.

- The system shall support concurrent user access without degradation in performance.

3.3.2 Security Requirements

- User authentication shall be implemented using secure protocols (e.g., HTTPS).

- Customer data shall be encrypted during transmission and storage.

- Access controls shall be enforced to restrict unauthorized access to sensitive data and features.

3.3.3 Reliability Requirements

- The system shall have a minimum uptime of 99.9%.

- Backup and recovery mechanisms shall be in place to prevent data loss in case of system failures.

3.3.4 Availability Requirements

- The system shall be accessible 24/7 except during scheduled maintenance windows.

- Failover mechanisms shall be implemented to ensure uninterrupted service availability.

3.3.5 Maintainability Requirements

- The system shall be modular and well-documented to facilitate future enhancements and maintenance.

- Code versioning and repository management shall be implemented using Git or a similar version control system.

3.3.6 Scalability Requirements

- The system shall be designed to scale horizontally to accommodate increased user and customer record loads.

- Auto-scaling mechanisms shall be implemented to dynamically allocate resources based on demand.

3.4 Ethical Perspective

- The CRM software shall comply with all relevant laws and regulations governing the handling of customer data, including GDPR, CCPA, and other privacy regulations.

- Users shall be required to obtain consent from customers before storing and processing their personal information.

- The system shall provide mechanisms for users to opt out of communications and data processing activities.

3.5 Restrictions and Limitations

- The CRM software is intended for business use only and shall not be used for illegal or unethical activities.

- Users shall not share login credentials or access rights with unauthorized individuals.

- The system shall not store sensitive customer information