Software Requirements Specification (SRS) for CRM System

1. Introduction

1.1 Purpose

The purpose of this document is to outline the detailed requirements for the development of a Customer Relationship Management (CRM) system. The CRM system is designed to improve customer interactions, streamline business processes, and enhance overall profitability.

1.2 Scope

The CRM system will manage various aspects of customer interactions, including customer information, sales data, and support interactions. The system will be accessible via both web and mobile applications, ensuring broad accessibility for all users.

1.3 Definitions, Acronyms, and Abbreviations

CRM: Customer Relationship Management

UI: User Interface

API: Application Programming Interface

1.4 References

Company standards document

Industry best practices for CRM systems

2. Overall Description

2.1 Product Perspective

The CRM system will integrate seamlessly with existing systems, such as the company’s ERP (Enterprise Resource Planning) and email servers. This integration is crucial for providing a unified view of customer interactions and ensuring data consistency across platforms.

2.2 Product Functions

The main functions of the CRM system include:

Managing customer information and interactions

Tracking sales and sales-related activities

Managing customer support and service requests

Generating reports for analysis and decision-making

2.3 User Characteristics

The CRM system will be used by:

Sales Representatives: For managing customer leads and sales activities

Customer Service Agents: For handling customer inquiries and support requests

Managers: For overseeing operations and performance metrics

Administrators: For managing system settings and user permissions

2.4 Constraints

The CRM system must:

Comply with all relevant data protection regulations, such as GDPR.

Be scalable to support up to 10,000 concurrent users without performance degradation.

Ensure data integrity and security, particularly in handling sensitive customer information.

3. Specific Requirements

3.1 Functional Requirements

3.1.1 Customer Management

The CRM system should maintain comprehensive records of customer information. Each customer record should include unique identifiers, contact details, and account status. The system should allow users to add, update, and view customer information seamlessly.

3.1.2 Sales Management

The CRM system should facilitate the management of sales activities. It should track sales transactions, including product details, customer associations, sales dates, and amounts. The system should enable sales representatives to manage and follow up on sales leads effectively.

3.1.3 Support Management

The CRM system should support the management of customer support requests. It should allow the creation of support tickets with unique identifiers, customer associations, detailed issue descriptions, and current statuses. Customer service agents should be able to track, update, and resolve support tickets efficiently.

3.1.4 Reporting

The CRM system should provide robust reporting capabilities. It should generate various types of reports, such as sales reports, customer reports, and support activity reports. Each report should include details like the report type, generation date, and relevant data for analysis.

3.2 Non-Functional Requirements

3.2.1 Performance Requirements

The system must ensure a response time of less than 2 seconds for 95% of transactions.

3.2.2 Security Requirements

All data must be encrypted during transit and at rest.

User authentication must be enforced using multi-factor authentication (MFA).

3.2.3 Usability Requirements

The user interface must be intuitive and user-friendly, adhering to standard usability guidelines.

4. Appendices

4.1 Glossary

Customer: An individual or organization that purchases goods or services from the company.

Sales: The act of selling goods or services in exchange for money.

Support Ticket: A record created to track a customer's request for assistance.

Report: A document that provides structured data for analysis and decision-making.

Instructions for the Team

As a team exercise, identify the following from the SRS above:

Root Elements: These represent the main entities or modules within the CRM system. Look for the primary functional areas described in the requirements.

Elements: These are the key components or data points within each root element. Identify these by examining the descriptions of what each part of the CRM system should handle.

Attributes: These are the specific properties or details associated with each element. Determine these by noting the specific data points and descriptions provided for each element.

By thoroughly analyzing the detailed requirements, the team can extract the root elements, elements, and attributes needed for developing the CRM system.