

## Project Requirements Documents

Stakeholder: Dr. Nabeel Mohammed

Version: Initial

Product POC:

Design POC:

Tech POC:

Title: Customer Relationship Management Platform

Release Date: Phase\_1 05/10/25

Phase\_2 TBA

Vision: This System aims to make a strong CRM system that keeps all customer information in one place, helps manage talks and messages with them, and automates regular work. This system will help sales, support, and marketing teams work together and handle customers more easily.

### Problem Statement:

Current customer management is inefficient because:

- Customer data is scattered across different tools.
- No central log for interactions, causing lost data and confusion.
- Manual tracking of complaints and follow-ups is time-consuming.
- The lack of integration of third-party APIs causes missed and delayed responses.
- Cannot see a customer's complete history.
- There is no automation or AI to help the team..

### Target Users

- Sales Team: Track leads, manage opportunities, and close deals.
- Customer Support Team: Handle customer queries and complaints efficiently.
- Managers/Admins: Monitor performance, analyze reports, and manage team access.

### Primary Objective:

- Centralize Customer data
- Improve sales efficiency
- Enhance customer Experience
- Provide actionable insights

### Secondary Objective:

- Integration with Existing Tools
- User Role & Permissions Control
- Mobile/Web-friendly interface

### Scope: The project will be developed in two phases:

- Phase 1: Core CRM foundation — manual but functional operations.
- Phase 2: Intelligent expansion — automation, AI, and conversational systems

### Functional Requirements:

- User Authentication and Access Control
- Logging and Activity Tracking
- Customer Profile Management
- Communication Management
- Complaint and Issue Tracking
- Third-Party Integrations
- Dashboard and Reporting
- Common CRM Features
- Conversational Agent / AI Bot
- MCP Server Integration
- Chat Functionality
- Auto-Update Functionality
- Workflow Automation
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