Sales Grow-CRM-SRS - software requirement specification

Corporate law (Bhupendra Narayan Mandal University)

Customer Relationship Management-CRM

Take control of your business
Access to every customer history
Personalized sales

WTM SalesGrow CRM

Grow your Sales & Business
An Essential CRM Solution delivery quickly and affordably

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1. Introduction

1.1 Purpose

The purpose of the document is to collect and analyze all assorted ideas that have come up to define the system, its requirements with respect to consumers. Also, we shall predict and sort out how we hope this product will be used in order to gain a better understanding of the project, outline concepts that may be developed later, and document ideas that are being considered, but may be discarded as the product develops.

In short, the purpose of this SRS document is to provide a detailed overview of our software product, its parameters and goals. This document describes the project's target audience and its user interface, hardware and software requirements. It defines how our client, team and audience see the product and its functionality. Nonetheless, it helps any designer and developer to assist in software delivery lifecycle (SDLC) processes.

1.2 Scope

SalesGrow CRM helps organizations differentiate their businesses to achieve maximum top-and bottom-line growth. WTM offers the broadest and deepest portfolio of CRM solutions that address all customer touch-points and provide rich functionality to support the specific business needs for organizations of every size to deliver a superior customer experience.

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1.3 Overview

The remaining sections of this document provide a general description, including characteristics of the users of this project, the product's hardware, and the functional and data requirements of the product.

General description of the project is discussed in section of this document. It gives the functional requirements, data requirements and constraints and assumptions made while designing the SalesGrow. It also gives the user viewpoint of product. It also gives the specific requirements of the product. It also discusses the external interface requirements and gives detailed description of functional requirements. It is for supporting information.

2. Specific Requirements

2.1 Functionality

The functional requirements of the SalesGrow CRM service can be grouped into tree main parts:

2.1.1   Front End

2.1.1.1 Modules

3.2.7.1.1 **Home:** The Home tab in SalesGrow CRM gives you the option to add components (widgets) that are most often used. For example, you can add a component to view the tasks and events for today or the list of potentials that are closing this week. Also, you have the option to add components from dashboards that represent pie charts, funnel diagrams and bar charts.

3.2.7.1.2 **Dashboard:** Dashboard is a pictorial representation of your custom reports, which gives a real-time snapshot of your organization's key metrics. Using dashboards, you can easily visualize the patterns and trends in sales, marketing, support, and inventory related data. For example, you can glance at the products that are selling fast over a period of time, compare the current quarter sales with previous quarter sales, or compare the actual sales to the projected sales.

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3.2.7.1.3 Lead: WTM SalesGrow CRM gives you the opportunity to optimize your lead generation process by creating genuine leads that have higher conversion Probability. By automating tasks, managing & categorizing contacts (as per location, industry or source) and sending out regular product information to existing and prospective customers, WTM SalesGrow makes the lead generation procedure highly focused.

3.2.7.1.4 Contact: Access critical customer data including key contacts, communication history, and more quickly and easily with WTM SalesGrow you'll get a complete picture of every customer, from social insights to campaign history, to deals they're involved in.

3.2.7.1.5 Account: Account management is the process of managing the communications and transactions with businesses having many contacts and divisions. This makes it possible to cater to the needs of specific divisions inside a business. By categorizing contacts to accounts by their subdivisions and functions, communication is directed to the proper personnel in charge.

3.2.7.1.6 Potential: Get all the details on all your team's deals — stage, products, competition, quotes, and more. See where leads come from and stay connected to the people and information you need to close every sale.

3.2.7.1.7 Campaign: Campaign management allows you to plan, and keep track of the campaigns in your SalesGrow CRM account.

3.2.7.1.8 Product: Products can be either goods or services, which are sold or procured by your organization. In SalesGrow CRM, you can manage your company- wide products that are sold to the customers as well as procured from vendors. Both sales and purchasing departments can use the Products module effectively according to their department process. If your organization procures products from vendors and then sells to customers with a markup, both the sales and purchasing departments can coordinate more effectively.

Sales departments can use the products module along with other modules, such as leads, accounts, potentials, quotes, sales orders, and invoices. Purchasing departments can use the module along with Vendors and Purchase Orders. In general, the Product details page contains the product name, manufacturer or reseller name, part numbers, sales start and end dates, support start and end dates, price, stock position to name a few.

3.2.7.1.9 Purchase Order: A Purchase Order is an order placed for procuring products or services from your vendors. It is a legal binding document that protects interests of both the vendor and buyers. In general, a Purchase Order (PO) contains the PO number, date, line items (products) including the quantities and prices based on the Sales Quote, Billing address, Shipping address, and Terms & Conditions. You can use the PO for communicating your product and pricing requirements to vendors so there will not be any pricing questions in future. You can also use the PO to cross-check the products shipped to your shipping address and invoices sent to you. In addition, your vendor can use the PO as a legal document in the event of nonpayment in a court of law.

3.2.7.1.10 Sales Order: The Sales Order is a confirmation document sent to the customers before delivering the goods or services. Sales Order (SO) can be created once the quote is accepted by your prospective customer (potential) and the Purchase Order (PO) is sent by the customer for further processing. After receiving the PO, the Customers may request SOs to know the exact date of delivery of the goods or services. Also the inventory/production department looks at the list of Sales Orders to see what needs to be shipped out and when. After the order is shipped and delivered to the customer an invoice is generated from the sales order for billing purposes. In general, SO contains the SO number, date, line items (products) including the quantities and prices based on the PO, Billing address, Shipping address, and the Terms & Conditions.

3.2.7.1.11 Quote: Sales Quotes are legally binding agreements between a customer and vendor to deliver the customer requested products in a specified time-frame at a predefined price. Your customers can place orders within the stipulated period (validity date) that has been specified in the quote otherwise you may cancel the quote or send a new quote extending the time-frame. In general, a Sales Quote contains the Quote number, date, line items (products) including the quantities and prices based on your Price Books, Terms & Conditions.

3.2.7.1.12 Vendor: Vendors include companies, people, and contractors from which your company gets products and services. They can be either direct manufacturers or resellers.

3.2.7.1.13 Price Book: Price Books are used for selling products at different prices, based on the agreement terms with a particular type of customer. For each customer you can sell the same product at different prices.
There are two key prices in price books. One is **Unit Price** and the other is **List Price**.

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- **Unit Price** - It is a price fixed by the manufacturer for the product and which cannot be changed.
- **List Price** - It is the sellers' price. The manufacturer/resellers may sell the product with different prices to their resellers/customers. These variable prices for the same product are called as List Prices.

3.2.7.1.14 Invoice: Once the sales stage reaches its final phase you may start working on the payment procedure. In this regard an Invoice plays a vital role, which is important for both Sales and Accounting purposes. An invoice is a bill issued by the vendor to the customer along with the goods or services shipment. It usually contains the Purchase Order reference number, Date, Billing Address, Shipping Address, Terms of Payment, Line Items (products/services) with quantities and prices. In a typical organization, invoicing completes the sales process and begins the accounting process where accounts receivable is managed by the Accounts/Finance teams.

3.2.7.1.15 Task: A task is a specific piece of work required to be done within a given time frame. They are listed in the SalesGrow CRM's Activities in other related records.

3.2.7.1.16 Event: An event is an activity that happens at a given place and time. They are listed in the SalesGrow CRM's Home page of the user, Activities in other related records.

3.2.7.1.17 Call: The Log Call functionality helps you to register the **inbound calls** (received from leads and customers) and **outbound calls** (dialed to leads and customers) with call details such as call duration, date and time of calls, notes, etc.

3.2.7.1.18 Case: case trouble tickets are used to capture customer feedback on various types of issues that arise after purchasing a product or service from your company. Sometimes customers provide good feature requests using this platform that may be useful when developing future product or service enhancements.

3.2.7.1.19 Solution: The Solutions module integrated with Cases is very useful for organizations that are mainly focusing on post-sales support, particularly technology and knowledge-based industries.

3.2.7.1.20 Email: The Email module manages your modules email history and provides functionally to compose email.

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3.2.7.1.21 Report: SalesGrow CRM reports are the detailed and informative list of records. Each report provides access to important data required for various purposes. Standard reports are provided in various modules, which can be either used as it is or customized further as per your business requirements.

3.2.7.1.22 Forecast: SalesGrow forecasts are an important measurement of your company's growth and success. Factors such as previous sales forecasts and revenue, competition, economic conditions, sales team and their performances, industry trends are considered while predicting monthly or quarterly sales targets. If your company meets consecutive sales forecasts, then you are assured that the company is growing!

2.1.1.2   Module Tools

3.2.7.1.23 Manage Home Components: You can customize the Home Component of your SalesGrow CRM account by adding what we call as components. Adding components to the Home tab is like creating a desktop shortcut to your favorite apps on your computer. It's for quick and easy access to the things that you use the most.

3.2.7.1.24 Manage Dashboard Components: After creating a dashboard you must add components (representing the exact data in pictorial form), which includes Bar, Pie, Line, Funnel, or Table charts. You can select the charts to display the data in pictorial form and also a table to display the data in tabular format.

3.2.7.1.25 Manage View: In the *<Module> Home* page, you can select the required list view from the View drop-down list. You can only rearrange the order of the columns or add more columns to the standard view modes.
You can create custom list views in SalesGrow CRM by defining criteria as per your requirement.

3.2.7.1.26 Import Data: Importing records help you to create new leads by gathering data through various sources, such as purchasing a record database, records from different business units, etc. You can import records with the help of two features:
Import My [Module] - Use this feature to import the records owned by (assigned to) you. By default, the records' ownership is automatically assigned to the user who imports the records.
Import My Organization [Module] - Use this feature to import all the records that are owned by (assigned to) the users in your organization, including the records

owned by you. While importing, the import file should have a column that contains the **exact email address of the users to whom you want to assign each record**.

3.2.7.1.27 Export Data: The *Export Data* feature allows you to export data (in CSV format) from individual CRM modules. After exporting the data, you can further validate or store the data in your own server(s).

3.2.7.1.28 Mass Update: Update record value of the bulk records.

3.2.7.1.29 Mass Transfer: Change the owner of the bulk records.

3.2.7.1.30 Change Owner: Change the owner of the records.

3.2.7.1.31 Mass Delete: Delete the data of the bulk records.

3.2.7.1.32 Approve Records: The import feature and Web forms have an option to enable manual approval of records. When this option is enabled, records imported or gathered through web forms are not added directly to the modules. They need to be approved first for other users to access the records. Records can be approved for the **Leads**, **Contacts**, **Cases** or **any other Custom module's** records.

3.2.7.1.33 Manage Emails: With the SalesGrow Mail Add-on, now you can send Emails to your Leads, Contacts and Potentials modules. You need not go to your favorite Email service to communicate with your contacts.

3.2.7.1.34 Manage Notes: You can use the notes to write questions, reminders, and anything you would write on notepaper. These are useful for storing bits of information related to customers, which you may need later.

3.2.7.1.35 Manage Activities: The Activities module is where you can create and associate business tasks, events and calls. Each activity has vital information on the date, time, priority level and notification parameters that can even be accessible from within the record it is associated to.

3.2.7.1.36 Manage Attachments: File attachments are documents, such as Marketing Collateral, Sales Quotes/Orders/Invoices, SLA, and others that can be associated to the CRM modules.

3.2.7.1.37 Manage Related Modules: Each record in SalesGrow CRM has the option to associate other records to it. For example, a Contact has notes, activities,

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potentials, products, attachments, etc. associated to it. These are called Related Lists and are provided by default but you can also have custom related list added to a record. Custom Related Lists helps you view data collected from other sources.

3.2.7.1.38 Print Records: You can print record, invoice and all module view.

2.1.2 Setup

1.1.1.1 Organization Setting: Before you get started, it is necessary that you add organizational details that include setting up currency, time zone, company logo, business hours, fiscal year, etc. These details will reflect in your organization's SalesGrow CRM account.

1.1.1.1.1 Company Details: Personalize your company CRM account by setting your company details and company logo. Also, set your currency and define the fiscal year for your organization.

1.1.1.1.2 Fiscal Year: The fiscal year setting helps organizations to configure their fiscal cycle based on the selected start month. Once the fiscal start month is selected, fiscal quarters are automatically rolled up.

1.1.1.1.3 Business Hours: Customer support teams in an organization may follow their own business hours and work in shifts based on different time zones.

1.1.1.2 Personal Setting: Users in many organizations work from different locations, across different time zones and geography. Each user can set up their personal preferences in **SalesGrow**. You can personalize and manage the settings in your **SalesGrow CRM account** that includes defining a country locale, language, time zone, date format, etc. Certain operations that you perform in **SalesGrow** Accounts will be updated automatically in the personal settings of **SalesGrow** CRM and vice versa.

1.1.1.2.1 Account Information: Personalize your CRM account by setting your country locale, time zone, language and personal details.

1.1.1.2.2 Name Format: By default, the name format is set as **<Salutation> <First Name> <Last Name>**. However, you can change the name format as per naming conventions used in your country.

1.1.1.3   Themes: SalesGrow CRM Themes give individual users the option to customize the colors and layout of their CRM account

1.1.1.4   Users and Permissions

1.1.1.4.1 Users: User is one who manages records, their own or those shared by other users, within the organization. In addition to accessing the CRM data, some of the users can perform administrative functions for smooth running of the CRM account.

1.1.1.4.2 Profiles: The profile function controls the permission to CRM modules, records, fields in a record, and various utilities, such as import, export, send email, mass update, etc. Users associated to the profile can access the functions that are assigned to them.

1.1.1.4.3 Roles: You can set up the organization-wide hierarchy using Roles. Users at a higher hierarchy can always access all the records of at a lower hierarchy.

1.1.1.4.4 Groups: You can create different types of groups (set of users) to manage a set of common records. Groups can be used for setting up team selling, team support, event management by a group of marketing users, etc. Users associated with a particular group can access the records shared to a particular group and perform the necessary operations on the records.

1.1.1.4.5 Data Sharing Settings: An Access right to SalesGrow records is set as private so that the record owner and his/her manager can oversee the CRM data. However, using the Data Sharing Rules, you can extend the access rights to users belonging to other roles and groups. Once the data sharing rules are configured, users associated to other roles and groups can gain additional access to the records that belong to other users.

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1.1.1.5   **Software Customization:** Customizing is the most powerful way of achieving a successful organization-specific Customer Relationship Management system. One of the key elements of SalesGrow CRM is its capacity to allow customization and the flexibility to do so.

1.1.1.5.1 Modules: You can add new modules as per your requirements. These modules will be available to all the users added to your organization's CRM account.

1.1.1.5.2 Fields: You can add new fields as per your requirements. These fields will be available to all the users added to your organization's CRM account.

1.1.1.5.3 Layouts: Page-Layout customization is one of the important functions that allow CRM administrators to define the organization-specific requirements within each module. Ideally, this should be completed before rolling out the CRM system for the organization.

1.1.1.5.4 Search Layouts: The Search Layout helps you customize the field values that you want to view in search results.

1.1.1.5.5 Related List: The Related Lists are the records that are associated to the parent record.

1.1.1.5.6 Customer View Setting: You can set default view according to module.

1.1.1.5.7 Related List Lookup: The Related Lists Lookups are the records that are use for display that how many fields display in module lookup list.

1.1.1.6   **Templates**

1.1.1.6.1.1   Email Templates: Communicating with customers is an important activity in any business scenario. SalesGrow CRM provides **Email Templates** to send one message to multiple recipients. Email templates can be used to send a mass Email to leads/contacts, and send Email notifications to the SalesGrow CRM users upon triggering a workflow rule.

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1.1.1.6.1.2 Inventory Templates: You can customize the Quote, Purchase Order, Sales Order and Invoice print layout as per your business requirements. As part of the template customization, you can change the fields in the print layout, position of the company logo, look & feel of the layout and alignment of the line items

1.1.1.7 Automation:
SalesGrow CRM gives you the option to automate workflow procedures and set up automatic replies, alerts, and notifications in advance.

2.1.2.6.1 Workflow: Workflow Tasks are assigned to the users when the associated workflow rules are triggered. A workflow task can be associated to a workflow rule, when you want to create a task and assign it to a user, upon triggering the rule.

1.1.1.8 Data Administration

2.1.2.7.1 Recycle Bin: The Recycle Bin stores all the records and files that are deleted from the SalesGrow CRM account. The records in the recycle bin will be available for 60 days after which it will be permanently deleted from your CRM account.

1.1.1.9 Apps & Add-ons

2.1.2.8.1 WTM Apps: The time and effort that you put into choosing and setting up a phone system for your business is always worth it. The goal is to give your customers an easy way to get in touch with you and provide the best services to clarify their doubts and address their concerns. Not to ignore the fact that, a good PBX system is of great help to the sales reps as well.

1.1.1.10 Territory

2.1.2.9.1 Territories: A territory is the demarcation of the sales force structure by which customers accounts are grouped and shared with the sales people of an organization. Territories can be based on various factors such as geography, industry, product line, the expected revenue, verticals, etc.

When your business is spread across regions and you have multiple office divisions, departments and numerous products/services, it is not an easy task to assign customer accounts to sales teams without proper planning. In some cases, it is equally complex to provide access only to selective accounts, for individuals from different teams to work together for a common sales objective.

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2.1.2.9.2 Territory Rules: Under **Account Rule**, specify criteria for accounts. Based on this rule criterion, territories will be assigned to accounts in SalesGrow CRM.

Under **Potential Rule**, specify criteria for potentials. These options will be available only if it is enabled under *Settings*. Based on this rule criterion, territories will be assigned to potentials in SalesGrow CRM.

2.1.2.9.3 Assign Territories: When the territory's assignment rules are run, records that meet the rule criteria in the territory will automatically be assigned to the territory. Initially, when you go to **Setup** > **Territory Management** > **Assign Territories** in your SalesGrow CRM account, you need to run the rules for the existing accounts. Based on the account's territories, the associated contacts and potentials will also be assigned to territories. If you enable Potential Rules, you can run rules for potentials as well.

2.1.3 Miscellaneous

1.1.1.1 **Manage Customize Reports:** You can create new module-specific reports linking some of the other cross-functional modules. You can generate Tabular Report, Summary Report, and Matrix Report.

1.1.1.2 **Manage Scheduled Reports:** You can automatically send reports to your colleagues, executive management and non-SalesGrow CRM users by scheduling the desired reports daily, weekly, monthly or yearly. Once the Report scheduler is configured, specified reports will be delivered to the recipients as an email attachment (XLS format).

1.1.1.3 **Manage Scheduled Emails:** You can automatically send email according to scheduled time.

1.1.1.4 **Global Search:** The search option helps locating specific information or specific records without having to go through the entire list of records, thus saving time in finding records.

1.1.1.5 **Notification:** Alert notification for unread task, event and any activities.

3 Technical Requirements

3.1 SaaS (Software as a Service) - WTM Cloud Host

3.1.1 Performance

The information retrieval should be as fast as possible for customer satisfaction.

To ensure this, the consumer should be able to download a page in 5 seconds with a 1024 Kbps modem. The form submission should not take a long time to be processed, especially in the CRM module case, in which form applications play a major role.

Separation of connection handling and data processing

Separation of connection handling and data processing would definitely improve the overall system performance as well as cost incurred.

Software runs on an online platform

Slow data retrieval because of poor programming must be absolutely discarded since the software runs on an online platform.

Minimize the data transfer time

The size of data sent to the user can be limited to an upper bound, especially for the multimedia files, to minimize the data transfer time.

Size of the secondary storage

The larger the primary memory, the faster the applications would run. Moreover the size of the secondary storage should be sufficient for data swapping, recovery and backup procedures.

3.1.2 Reliability & Availability

Internet Service Provider

The system shall provide a contractual agreement with an internet service provider for T3 access with 99.9999% availability.

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The system shall provide a contractual agreement with an internet service provider who can provide 99.999% availability through their network facilities onto the internet.

Back-end Internal Computers
The system shall provide storage of all databases on redundant computers with automatic switchover.
The system shall provide for replication of databases to off-site storage locations.
The system shall provide RAID V Disk Stripping on all database storage disks.

3.1.3 Security
The system shall automatically log out all customers after a period of inactivity.

The system shall confirm all transactions with the customer's web browser.

The system shall not leave any cookies on the customer's computer containing the user's password.

The system shall not leave any cookies on the customer's computer containing any of the user's confidential information.

3.1.4 Supportability

Compatible with Operating Systems
- Any Operating System

3.1.5 Design Constraints

Web Based Product
The computers must be equipped with web browsers such as Firefox, Chrome.

The product must be stored in such a way that allows the client easy access to it.

Response time for loading the product should take no longer than five minutes.

A general knowledge of basic computer skills is required to use the product

On-line User Documentation and Help System Requirements

As the product is SalesGrow, On-line help system becomes a critical component of the system which shall provide –

It shall provide specific guidelines to a user for using the SalesGrow system and within the system.

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To implement online user help, link and search fields shall be provided.

3.1.6 User Interfaces

The user interface for the software shall be compatible to any browser such as Mozilla Firefox or Google Chrome by which user can access to the system.

3.1.7 Hardware Interfaces

Since the application must run over the internet, all the hardware shall require to connect internet will be hardware interface for the system. As for e.g. Modem, WAN – LAN, Ethernet Cross-Cable.

3.1.8 Communications Interfaces

The system shall use the HTTP protocol for communication over the internet and

for the intranet communication will be through TCP/IP protocol suite.

3.2 Desktop - Self host by company

3.2.1 Performance

Separation of connection handling and data processing

Separation of connection handling and data processing would definitely improve the overall system performance as well as cost incurred.

Software runs on an online platform

Slow data retrieval because of poor programming must be absolutely discarded since the software runs on an online platform.

Minimize the data transfer time

The size of data sent to the user can be limited to an upper bound, especially for the multimedia files, to minimize the data transfer time.

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The system shall not leave any cookies on the customer's computer containing any of the user's confidential information.

3.2.3 Supportability

Compatible with Operating Systems

- Windows

Compatible with J2EE Application Servers

- Tomcat

Compatible with Database

- MySql 5.5 with JDBC driver

Compatible with Java Virtual Machines

- Sun JDK 1.7 with Windows NT, Solaris and Red Hat Linux

Compatible with System Requirements

- 1024 MB RAM or more 1000 MHz processor or better

- 1 GB disk space for application .war file
- JDK 1.7 or higher
- SQL database

3.2.4 Design Constraints

Web Based Product

The computers must be equipped with web browsers such as Firefox, Chrome.

The product must be stored in such a way that allows the client easy access to it.

Response time for loading the product should take no longer than five minutes.

A general knowledge of basic computer skills is required to use the product

3.2.5 User Interfaces

The user interface for the software shall be compatible to any browser such as Mozilla Firefox or Google Chrome by which user can access to the system.

3.2.6 *Hardware Interfaces*

No Internet need. If using multiple users, application must run over the LAN.

3.2.7 **Communications Interfaces**

The system shall use the HTTP protocol for communication over the internet and

for the intranet communication will be through TCP/IP protocol suite.

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