Activity Management

1. Document Purpose

This document defines the requirements for the **Activity Management** feature in the iOS and Android CRM applications, enabling users to log and manage customer interactions directly from mobile devices.

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2. Feature Overview

Activity Management allows users to manually log and manage customer-facing interactions such as calls, meetings, emails, and follow-ups against CRM records. This feature ensures sales and support teams can record interactions in real time while on the move.

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3. Goals and Objectives

Goals

- Enable real-time activity logging from mobile.
- Maintain parity with existing web CRM activity functionality.
- Reduce missed or delayed activity entries.

Success Metrics

- Increase in activities logged from mobile.
- Reduction in post-interaction logging delays.
- User adoption of mobile activity logging.

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4. In-Scope Functionality

4.1 Supported Activity Types

- Call
- Meeting
- Email

- Follow-up task

- Manual note

4.2 Activity Creation

Users must be able to:

- Create activities from within a CRM record.

- Associate each activity with a single CRM record.

- Capture required fields:

    o Activity type

    o Date and time

    o Duration (where applicable)

    o Notes or description

    o Activity owner

4.3 Activity Editing and Deletion

- Users can edit or delete activities they own, subject to permissions.

- Activity updates must reflect in real time on web and mobile.

5. User Flows

Log Activity

1. Open CRM record.

2. Select "Add Activity".

3. Choose activity type.

4. Enter details.

5. Save activity.

6. Functional Requirements

- Support offline activity creation.

- Sync offline activities automatically when online.

- Prevent duplicate activities during retries.

- Validate required fields before saving.

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7. Non-Functional Requirements

Performance

- Activity creation must complete within 1 second online.
- Offline saves must be instantaneous.

Security

- Enforce role-based access control.
- Activity ownership must be preserved.

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8. Out of Scope

- Automated activity creation.
- Activity analytics and reporting.
- Email auto-sync from inbox.

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9. Acceptance Criteria

- Users can log and edit activities from mobile.
- Activities sync correctly across platforms.
- Permissions are respected.

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10. Dependencies

- Activity APIs from web CRM.
- Offline sync framework.
- Authentication and authorization services.