

REQUIREMENT ANALYSIS

FUNCTIONAL REQUIREMENTS:

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR 1	Customer Management	Customer Profiles: Create and maintain detailed customer profiles with information such as contact details, purchase history, and communication preferences. Lead Management: Capture and manage leads from multiple sources, including website inquiries, email, and social media. Contact and Account Management: Track individual contacts and accounts associated with customers, including roles and affiliations.
FR 2	Sales Management	Opportunity Tracking: Manage sales opportunities, including stages, close dates, and sales team assignments. Sales Pipeline: Visualize and report on the sales pipeline, allowing for

		<p>revenue forecasting and monitoring sales performance.</p> <p>Quote and Proposal Generation: Generate quotes, proposals, and sales documents within the CRM application.</p>
FR 3	Market Automation	<p>Customer Segmentation: Segment the customer base based on demographics, purchase history, and behavior for targeted marketing.</p> <p>Lead Nurturing: Automate lead nurturing processes, such as email sequences, to move leads through the sales funnel.</p> <p>Email Marketing: Manage email marketing campaigns, including email templates, scheduling, and tracking</p>
FR 4	Order and Inventory Integration	<p>E-commerce Platform Integration: Integrate with E-commerce platforms to sync order data, inventory levels, and product catalogs in real-time.</p> <p>Order Tracking: Provide real-time order tracking for customers to monitor the status of their orders.</p>

		Inventory Management: Ensure accurate product availability information, prevent overselling, and track stock levels.
FR 5		Report Generation: Create custom reports and dashboards to track sales performance, customer behavior, and marketing campaign effectiveness. Key Performance Indicators (KPIs): Define and monitor KPIs to make data-driven decisions and assess the health of the business. Analytics: Implement analytics features for advanced insights into customer behavior and trends.
FR 6	User Access and Permissions	User Roles and Profiles: Define user roles and profiles with specific permissions to control data access and system functionality.

TECHNICAL REQUIREMENTS:

TR No.	Technical Requirement	Description
TR 1	Salesforce Environment	Utilize Salesforce's Enterprise or Unlimited edition to ensure scalability and access to advanced features.
TR 2	Development language	Develop using Salesforce's proprietary programming language, Apex, for server side logic.
TR 3	Security	<ul style="list-style-type: none">• Implement role-based access control (RBAC) to control who can access and modify data.• Encrypt sensitive data both in transit and at rest.• Utilize Salesforce Shield for enhanced security, including event monitoring and field-level encryption.
TR 4	Integration	<ul style="list-style-type: none">• Use REST and SOAP APIs for integration with external systems, such as finance and expense management tools.• Implement Single Sign-On (SSO) solutions for seamless and secure access.

TR 5	Customization	Allow administrators to customize and configure the application, including approval workflows, fields, and user profiles.
TR 6	Mobile Assesibility	<ul style="list-style-type: none"> •Ensure that the application is accessible via the Salesforce mobile app for on-the go request submission and tracking. •Develop a custom mobile app using Salesforce Mobile SDK for more tailored mobile functionality.