Executive Summary

1.1 Project Overview

Keeping track of all business activities can be rather challenging, especially when there are multiple departments that require constant information transferring. In order to efficiently manage a fast-growing organization, a complete integrated system that covers all business aspects is more than necessary. This software aims to effortlessly manage business operations in the sectors of financing, accounting, sales, marketing, and human resources. It empowers the individuals of different positions to increase productivity, to deliver better customer experience and provide full control over financial activities.

This solution is a SaaS (Software as a Service) application, meaning that all the information is stored and processed in the cloud, thus being flexible for growing businesses that are expanding in terms of data. The ability to process data remotely significantly decreases the costs and resources of generating results.

The software will enable its users to collect leads, close deals quickly, create quotes and invoices, track business expenses, run reports, save time by managing the working hours of your employees and pay them automatically.

* 1. Purpose and Scope of this Specification

The purpose of this software is to assist managerial decisions and improve the overall company performance of [Company Name]. This software will store customer and employee data and use them to make marketing automations in multiple channels, forecast outcomes such as: deal success rates, sales revenue on different time periods, customer engagement and satisfaction. The application will be used from almost every individual in the organization who uses, insets or benefits from business data. (Ex: CEO, sales manager, human resource manager, marketing analyst etc)

Product/Service Description

2.1 Product Context

[Software Name] is a software which can be integrated in many departments, thus each section of this application is dedicated to one department covering the most crucial functionalities. It categorizes the users depending on their position and information needs, meaning that an admin can have full control over the system where as a sales person can only use specific features.

2.2 User Characteristics

The following users are part of the system:

* System Administrator

Install, configure, customize, manage permissions, and access all the features in the application.

* Sales Manager

Access to product management, sales management, sales forecasting, and goal management.

* Salesperson

Access to everything from lead to invoice – lead, opportunities, quote, order, invoice. Create accounts and contacts, and track goals.

* Marketing manager

Access all customers personal information, manage prospect list, create marketing automation templates, access and make posts on social media channels, run multi-channel campaigns, view key marketing metrics

* Human resource manager

Access and modify employee data, make payroll automations, check working hours, approve leaves or absences, run employee performance reports

Requirements

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Req# | Requirement | **Comments** | Priority | Date | SME Reviewed/Approved |
|  | The software should generate scheduled financial reports such as balance sheet, income report and cash flow. | This is a functionality included in the Finance & accounting section only the Accountant user, manager and system admin can access it |  |  |  |
|  | The software should keep track of the working hours of the employees and automatically calculate their salary. | This functionality is included in the HR section and through an API the software will automatically calculate the wage and deposit the salary of the employees in their bank account |  |  |  |
|  | The software should forecast the possibility of a lead to be converted into a deal based on different metrics entered in the program. | This functionality is included in the Sales section. With a machine learning algorithm called decision trees the program will classify and forecast sale performance and success deal rate |  |  |  |
|  | The software should provide an easy to use interface where the employees can effortlessly create marketing campaigns. | Marketing campaigns are part of the marketing section |  |  |  |
|  | The marketing automation tool should have a drag and drop interface |  |  |  |  |
|  | The marketing automation should be integrated with most of the social medias: Facebook, Instagram, Linkedin and it should also be integrated with most email providers |  |  |  |  |
|  | Email campaign feature should let the user to enter in an excel or csv format the data of the prospects and also offer the possibility to enter the data manually on the application |  |  |  |  |
|  | The email campaign should have A/B testing and email selection feature |  |  |  |  |
|  | The email campaign should have a timing feature that allows the users to run the campaigns on scheduled basis |  |  |  |  |
|  | The marketing section should display charts and dashboards related to email open & click rates, social media engagement, money spent on ads and the adds that are currently running |  |  |  |  |
|  | The marketing section should let the user automatically schedule social media posts |  |  |  |  |
|  | The sales section should have these sub-sections: Lead( to save data about potential customers), contact/account( to save data about current clients), opportunity (save data about potential deals from actual customers), deal( save data about closed deals) |  |  |  |  |
|  | The lead subsection should display the name of the potential customer, email, phone number, VAT number (if its a business) |  |  |  |  |
|  | The data account/contact subsection should be generated based on the data in the lead section so when a user decides that a lead has become a customer, he can automatically be transferred to the contact section |  |  |  |  |
|  | The products/services category under the sales section should enable the user to create single products/ services or bundles |  |  |  |  |
|  | The finance section should store data in table form and display useful charts which indicate useful business metrics that can be used to determine business performance |  |  |  |  |
|  | In the finance section the accountant should connect to the business taxation system and periodically generate automatic reports and send them to the desired destination |  |  |  |  |
|  | The HR section should save the data of the employees in the company and display them in table form |  |  |  |  |
|  | The HR users should be able to add new employee data, modify and delete existing ones |  |  |  |  |
|  | The HR users should have an easy interface to add working hours of the employees |  |  |  |  |
|  | The software should automatically generate HR reports which indicate employee performance which then can be used to predict overall business performance |  |  |  |  |
|  | The sales person should be able to generate quotes and add products to them while integrating it with the contact data |  |  |  |  |
|  | The sales person should be able to convert an existing quote to an invoice and add or remove products, or modify the price of them |  |  |  |  |
|  | The system administrators are the only users which can create modify and delete other users |  |  |  |  |
|  | The software should have a multiple user accesses. Each user can have one or more privileges depending on their actual role |  |  |  |  |
|  | The system administrator should be able to access all the sections in the system and modify specific graphics |  |  |  |  |
|  | The CEO should have a section on his own where he can see all the reports, dashboards and key metrics from all the sections |  |  |  |  |
|  | The CEO should also have a notification feature which notifies him on key department activities such as closed deals, starting of marketing campaigns, different transactions |  |  |  |  |
|  | The software should be scalable and should be accustomed depending on the data intensity |  |  |  |  |