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| Beautywares CRM |
| Software Requirements Specification |
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| **12/4/2015** |

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| This document details requirements for Customer Relationship Management solution built by Ram Software Engineering Labs development team in collaboration with Professors and students at Vellallar College of Engineering and Technology. |

**Document Revision History**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Version No.** | **Date** | **Author** | **Reviewed By** | **Status** | **Comment** |
| 0.1 | 8-Apr-2015 | Arunkumar K | -NA- | Draft | Initial Creation |

**Acronyms and Abbreviations**

|  |  |
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| **Abbreviation** | **Description** |
| CRM | Customer Relationship Management software |

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# Introduction

## Purpose

Beautywares is one of the largest independent tile retailers famous for choice, quality and service. In their outlet at Erode, they sell tiles, sanitary ware, Cp fitting, wellness, bathroom accessories and vanity cabinet for house or apartment or commercial constructions.

Beautywares is in need of a robust CRM solution that can increase the accountability and efficiency of their Sales and Marketing team there by aiding the growth of the company.

This document details the Software Requirements Specification for the first iteration of the proposed CRM solution.

## Organization of the Document

After briefly discussing the business requirement of the CRM solution, we will discuss in detail the UI and system requirements followed by non-functional requirements. Any assumption or detail that needs to be determined is presented in the end.

## Intended Audience

This document is intended for Project Management team, application development team, testing as well as management team at Beautywares.

## Product Scope

First iteration of this CRM solution comprises of following objectives as part of its scope.

1. As this software is a multi-user system with varying roles accessed within Beautywares intranet, the system should have user authentication and authorization.
2. Complete workflow of marketing and sales life cycle should be captured by the system along with the details of customer data and their requirements data.
3. Reporting on the efficiency and traceability of sales and marketing function
4. Preferably, management of employee database along with the details of increments, promotions and resignations.

Scope of first iteration does not include

1. Accounting and billing of sold products
2. Integration with client’s accounting system
3. Automation of or integration with workflow of purchasing products from vendors
4. Tracking delivery status of the order and managing exceptions when customer defaults

## References

Following documents serve as references for this document

1. **Beautywares\_UIrequirement.xlsx** - Complete set of screens for different users needed for the whole CRM solution and not just for iteration 1
2. **Marketing-Co-ordinator.pdf** – Business flow and set of vital use cases accessed by Marketing Co-ordinator in the complete version of CRM solution
3. **MarketingExe.pdf** – Business flow and set of vital use cases accessed by Marketing Executive in the complete version of CRM solution
4. **BeautyWaresCRM\_Proposal.docx** – Contains the business proposal submitted to Beautywares. Refer this for detailed understanding of the background and business requirements.

# Overall Description

## Product Perspective

Iteration 1 of this CRM solution is primarily focused on those manual processes involved in marketing and sales operations of Beautywares.

For details on background and perspective of this solution refer to Executive Summary section of the proposal document.

## Product Functions

Following high-level product functions are needed in iteration 1.

1. Authenticate user – Based on user’s role load the pages
2. Create user / employee with login credentials
3. Search customers – Search customer database based on name and contact details. User uses this search function to open a customer record to modify any of the associated details. In case user doesn’t find a matching customer record, user will create a customer record.
4. Add / update customer or prospect record – Enter customer / prospect details with identity and contact information
5. Add / update customer’s project details and requirements – When customer builds / or renovates or repairs a house or apartment or building it is considered as a project. Though most of the customers contact Beautywares only regarding one project, technically one customer can contact Beautywares for one or more of their projects’ requirements.
6. Add / update customer’s visit to Beautywares along with details of the visit i.e. which products he saw, what is the status of his inspection, when should the sales / marketing executive follow-up next – A customer can visit one or more times related to his project.
7. View list of follow-ups with filters on type (site visit or phone call or email), status, marketing executive, sales executive, area / location, customer
8. Add / update a follow-up – In case a follow-up task is not automatically created by the system, user can chose to add a follow-up. In case there is a change in a follow-up user can update details in follow-up. When an executive follows-up with customer, the user will update the follow-up record with the response from customer.
9. Assign owner for follow-up in pending status to specify who is responsible to do the follow-up – Marketing Coordinator assigns follow-up tasks to Marketing Executive and Sales Executive
10. Get list of follow-ups for the (current) day with filter on users – Sales Executive and Marketing Executive uses this function to find out the list of follow-ups to be done by them for today or tomorrow.
11. Get a report on customers whose project requirements are still not addressed – Management of Beautywares want to know the list of customers whose project requirements are still left open there by keep prospective sales pending. They may use this report to improve the follow-ups and negotiations done by sales and marketing executive with customers.
12. Get a report on number of calls that were made for given date range (by default show from beginning of month till date) on each call type
13. Get a report on number of offers that were made listing how many project requirements were converted to sales, how much we lost to other companies and how much are still in follow-up. This report can be both in numbers (count) as well as in rupees (value of the requirement)

## User Classes and Characteristics

Following is the list of roles (user classes) and their responsibilities.

1. **Admin** – Creates user, employee, allocates roles to user. Has all the entitlements of all the other roles listed below.
2. **Senior Management** – As of now, these users have all functions as Admin. In later iterations they might have different set of privileges
3. **Marketing Coordinator** – Tracks customer’s requirement and follow-up done by Marketing Executive and Sales Executive, gets reminders on allocated follow-up, gets report on status of follow-up, allocates customer follow-up tasks to Marketing Executive and Sales Executive
4. **Marketing Executive** – Create / update Prospect / customer, add / update customer’s project requirement, add / update follow-ups and track status of requirement
5. **Sales Executive** – Apart from what Marketing Executive can do, Sales Executive can add / update customer visit, follow-ups and track status of requirement

## Operating Environment

The system will be deployed on a Windows desktop where Tally ERP 9 server is already running. The system will be shutdown end of every day.

## Design and Implementation Constraints

The system should be

1. Accessible within company’s intranet
2. Accessible by multiple users at the same time
3. Accessible by all web browsers running latest version
4. Responsive when accessed from desktop or tablet or smart phone. So the system should employ best practices for responsive design
5. Intuitive and user friendly with less typing and more option boxes to choose from to avoid typing errors as users are not conversant with English
6. Extensible to enhance it with requirements of future iterations
7. Able to set it up with existing data present in Tally ERP 9
8. Based on open source software free of licensing and maintenance cost
9. Based on MEAN stack – MySQL (instead of MongoDB in the actual MEAN) as data store, Express JS as middleware, Angular JS as presentation and Node JS as the container

## User Documentation

User manual will be delivered along with the solution. No online help would be provided.

## Assumptions and Dependencies

Following are the assumptions for iteration 1

1. No integration with Tally ERP 9
2. No Accounting / billing functionalities
3. No godown or inventory management features
4. No tracking of delivery status of order

# System Features

This section details the functional requirements for the system.

## User Authentication

### Description and Priority

Priority: High

User has to login with user id and password to gain access to the system. As this is an intranet application with no email access to users, there won’t be forgot password option. User has to contact administrator to reset the password and gain access.

### Stimulus/Response Sequences

User visits the URL of the system to see the login page. After user enters user id and password and selects login button, server authenticates the user and presents the home page.

### Functional Requirements

REQ-1-1: Login page with user id and password fields should be shown with a Login button.

REQ-1-2: Login page should show the company name i.e. Beautywares

REQ-1-3: In case user doesn’t enter user id, system should highlight the field asking the user to enter login id

REQ-1-4: In case user doesn’t enter password, system should highlight the field asking the user to enter password

REQ-1-5: In case user credentials are invalid, system should prompt the user to enter valid user id and password

REQ-1-6: On successful authentication, user should be shown the home page

REQ-1-7: Login page should also be shown when user tries to access any page inside the system without login

REQ-1-8: Login page should also be shown when the user has kept the screen idle for long time that it has crossed session timeout time

## User Management

### Description and Priority

Priority: High

Administrator manages the list of users who are part of the system. As part of this functionality, administrator can add, update, find a user record as well as manage user login credentials.

### Stimulus/Response Sequences

User with administrator privilege gets to see user management section where links are provided to perform various operations to manage users.

### Functional Requirements

REQ-2-1: User Management should be accessible only by users with administrator privilege

REQ-2-2: User selects “Create User” to open the user creation form with the following fields

1. Employee Code (Mandatory) – Unique employee code
2. Name (Mandatory) – Full name of the employee
3. Date of Joining (Optional) – dd-MMM-yyyy format. Cannot be a date in the future. A date picker needs to be provided to select date
4. Department (Optional) – Free text. As the user types the system should suggest with whatever departments that are already present in Employee table
5. Designation (Optional) - Free text. As the user types the system should suggest with whatever designation that are already present in Employee table
6. Contact Number (Optional) – Employee’s mobile number
7. CTC (Optional) – Cost to Company
8. Login id (Mandatory) – By default it is same as employee code. User can change it. It should be unique. Employee should use this for login
9. Status (Mandatory) – By default it is ACTIVE. Administrator can change it to INACTIVE if the user should not be allowed to login
10. Date of Resignation (Optional) - dd-MMM-yyyy. Date when the employee is off the record. Any employee who has resigned will not be allowed to login after the date of resignation. A date picker needs to be provided to select date

REQ-2-3: User selects SUBMIT button to save user. System checks for mandatory fields, format of the fields and then the server checks for the uniqueness of the field. After successful validation, system stores user record in database. System reports back with error message in case of any failure.

REQ-2-4: On successfully saving user record, system should show a data grid listing all the users in the system sorted by employee name in alphabetical order. Following columns should be shown.

1. Employee Name
2. Employee Code
3. Department
4. Designation
5. Contact Number
6. Date of Joining
7. Role(s) – List of roles (separated by comma or new line) allocated to user

REQ-2-5: User can click on the column header to sort the rows in ascending or descending order based on the value in the selected column.

REQ-2-6: User can filter on any of the columns displayed in the grid

REQ-2-7: Employee code and Employee name acts as a hyperlink to open the user form to view and edit the user record.

REQ-2-8: When an existing user is loaded in the user form described in REQ-2-2, user can change the details present in the form to update the user record.

## User Authorization – Allocate roles to users

### Description and Priority

Priority: High

Administrator assigns roles to users.

### Stimulus/Response Sequences

User with Administrator privilege selects “Roles” to manage users allocated to roles.

### Functional Requirements

REQ-3-1: Only administrator sees the “Roles” link

REQ-3-2: System shows a data grid with list of users in the first column and one column containing checkbox each for the following roles.

1. Administrator
2. Senior Management
3. Marketing Coordinator
4. Marketing Executive
5. Sales Executive

REQ-3-3: Users who were assigned different roles should have the respective checkboxes selected.

REQ-3-4: Administrator can select / unselect any of the checkboxes pertaining to the user row to assign / remove role allocated to the user.

REQ-3-5: Data grid should be sorted in ascending order based on user’s employee name displayed in the first column.

REQ-3-6: On selecting SUBMIT, users should be allocated to roles as per checkbox selections in the grid.

REQ-3-7: On selecting RESET, checkboxes will be selected based on the allocation stored in database.

REQ-3-8: Allocated roles should take effect when the user subsequently login to the system.

## Search customers

### Description and Priority

Priority: High

All users in the system can search customers stored in the database. Search customer database based on name and contact details. User uses this search function to open a customer record to modify any of the associated details. In case user doesn’t find a matching customer record, user will create a customer record.

### Stimulus/Response Sequences

User clicks on “Search Customers” link to open the screen for searching customers that contains a search form.

User fills in search criteria and click on Search button to see the results in a data grid.

### Functional Requirements

REQ-4-1: Search Customers link is visible to all users

REQ-4-2: On selecting “Search Customers” link, Customer search form opens containing following fields to enter search criteria.

1. Customer Name: Partial match. Whatever user enters is matched with any part of the customer’s full name.
2. Customer type: Retail (Individual) / Company (Customer with one or more contacts) / ALL (includes both RETAIL and COMPANY)
3. Contact Name: In case the customer type is COMPANY, this criteria is used to filter based on partial matches with any of the contacts associated with customer
4. Contact Number: Complete match with customer’s mobile number or contact’s mobile number
5. Address: Partial match. Whatever user enters is matched with any part of the address field
6. Locality: Drop down or list box showing distinct localities present in customer table
7. New / Old: Drop down to select if the customer is NEW or OLD
8. Requirement status: By default “Open”. As for every project requirement (in each product category) we track the status till closure (BILLED, NOT REQUIRED, PUCHASED ELSEWHERE). This field should be a multi-select option where system will match with any of the selected status.
9. Last visit date - Start: A date in dd-MMM-yyyy format denoting a date after which the customer had paid a visit to the shop
10. Last visit date – End: A date in dd-MMM-yyyy format before which the customer had paid a visit to the shop
11. Marketing Executive: Name of the Marketing Executive who had approached this customer
12. Sales Executive: Name of the Sales Executive who had attended to this customer in the last visit.

REQ-4-3: On selecting “Search” button, system will search the customer records against the criteria and present the results in data grid.

REQ-4-4: Search results should be shown in a data grid with the following columns sorted on customer name by default.

1. Customer id
2. Customer name
3. Customer type: RETAIL / COMPANY
4. Contact number
5. Last Visit date
6. Requirement status
7. New / Old

REQ-4-5: User can click on the column header in the data grid to sort records based on that column.

REQ-4-6: Customer id and customer name fields in the data grid should act as hyper link to open customer record for editing.

REQ-4-7: In case there is no customer matching the search criteria, system should tell user that there are “No customers found”

REQ-4-8: A link “Add Customer” should also be present in the page so that user can create a customer if no matching customer exists.

## Add customer or prospect record

### Description and Priority

Priority: High

User creates a customer record. Till any of the customer’s requirements is billed, he remains as a Prospect. Prospect turns Customer when the first billing happens.

### Stimulus/Response Sequences

User searches database to find if the customer exists in the database. When it is confirmed that there is no matching customer, user selects “Add Customer” to open a Customer entry form through which he creates a customer record.

### Functional Requirements

REQ-5-1: Customer Entry form opens with following fields

1. Customer Name (Mandatory) – Full name of the customer
2. Contact Number (Mandatory) – Contact mobile phone number of the customer
3. Address (Optional) – Free text
4. Locality (Optional) – Free text. System should suggest possible localities as the user types based on locality already present in customer records. This is to avoid typing errors
5. PIN code (Optional) – Postal PIN code of customer
6. Sales Executive (Optional) – If the customer / prospect comes to the showroom directly, Sales Executive would normally attend him. This field corresponds to that Sales Executive who attended him first and responsible to create the customer record. This should be a drop down containing active list of users who are assigned “Sales Executive” role sorted in ascending order based on their name. In case the customer is contacted by Marketing Executive during the latter’s site visit, this field should be left blank.
7. Marketing Executive (Optional) – In case the customer is created by Marketing Executive during his site visit, user should select that Marketing Executive. This should be a drop down containing active list of users who are assigned “Marketing Executive” role sorted in ascending order based on their name. In case customer directly comes to the showroom, this field should be left blank.

REQ-5-2: Customer selects “SUBMIT” button to post customer details to server. System validates details entered by the user. If validation is successful and inserted into database successfully system presents the customer entry screen with the message “Customer record added successfully”. In case of any error, the system should report the error and be in the Customer Entry form.

REQ-5-3: Once the customer is added to database, customer entry form should show following non-editable (read only) additional fields.

1. Customer Id: Unique id generated by the system
2. Create date: Date and time when the customer record was created in the system
3. Last Modified: Last modified date and time

REQ-5-4: In case of a COMPANY customer, “Contacts” section should be shown below the customer entry form to add one or more contact persons from the company.

REQ-5-5: Contacts section below the customer entry form should show a data grid with the following columns

1. Contact Name: Full name of the contact
2. Contact Phone number: Mobile number of the contact
3. Designation: Designation of the contact person in the parent company

REQ-5-6: The rows in the contacts data grid should be editable so that user can add / update contact details directly in the table.

REQ-5-7: As soon as a customer record is created, a default project is created and shown in the Projects section below the customer entry form. One customer can have one or more projects.

REQ-5-8: Project section should contain data grid displaying list of projects shown. The name of the project acts as a link to open Project Details Entry form to capture requirements of the project. On creation of a customer, a default project entry would be shown in the grid.

1. Project Name – Name of the project. By default system generates a project name based on customer name suffixed by a running sequence number.
2. Project Type – Indicates if the project is Construction of house or apartment, renovation or Construction of commercial / corporate building
3. Start Date – Expected or approximate start date of the project
4. End Date - Expected or approximate completion date of the project
5. Status – If any of the project’s requirement is not in the final state then Status is Open else Closed

REQ-5-9: When user selects “Cancel” button, Search Customers page will be shown.

## Enter customer’s project details and requirements

### Description and Priority

Priority: High

When customer builds or renovates or repairs a house or apartment or building it is considered as a project. Though most of the customers contact Beautywares only regarding one project, technically one customer can contact Beautywares for one or more of their projects’ requirements.

### Stimulus/Response Sequences

From the customer details entry screen, user selects the project whose requirements need to be captured. System presents the user with Project Details Entry form to capture project requirements.

### Functional Requirements

REQ-6-1: Project details entry form should be shown with the following fields

1. Project Name (Mandatory) – System automatically generates this with the convention <Customer Name>-Project-<Number of existing projects + 1>. User can modify this default name. In the case of customers who are building apartments, each owner of a unit in that apartment visits showroom and selects different products. As individual unit’s requirements need to be tracked, every unit is captured as a project. In this scenario user can decide to edit the project name to include apartment number.
2. Project Type (Mandatory) – Drop down list containing types of project configured in the system like Factory, Institution, House, Apartment, Hospital
3. Project Description (Optional) – Free text. User can enter additional details of the project.
4. Project start date (Optional) - Start date of project in dd-MMM-yyyy format. This is only an approximate date
5. Project end date (Optional) – End date of project in dd-MMM-yyyy format. This is only an approximate date for reports.
6. Address (Optional) – Free text specifying where the project is located
7. Building stage (Optional) – Current status of the project. This is a drop down with list of stages configured in the system like Plastering, Plumbing, Concrete Over, Brick Work, Basement
8. Project Requirements – For each requirement, user will add one row of project requirements. Each project requirement row captures following information
   1. Requirement Type: This is a drop down listing system configured list of product categories like Floor Tiles, Exterior Tiles, Sanitary wares, Chimney, Solar
   2. Status: This is a drop down listing system configured list of status like Follow-up, Billed, Outside Purchase, Not Required, Quotation given, Advance paid
   3. Measurement: Free text. Approximate measurement of the requirement or number of units required to fulfil the requirement
   4. Approximate value: Approximate value of the requirement in case the customer buys the product from Beautywares
   5. Next follow-up date: In case user has to follow-up with the customer to track the requirements, user enters the date in dd-MMM-yyyy format specifying when to follow-up
   6. Outside purchase reason: In case customer has already bought the product from outside, then user specifies the reason as narrated by the customer to choose other vendor
   7. Bill No: In case customer fulfils the requirement by buying product from Beautywares, user enters the bill number associated with that sale.
9. Project Contacts – User adds one or more contact persons who are involved in the project. Each row in project contacts contain following fields
   1. Project Contact type – Drop down from list of types configured in the system like Engineer, Tile Layer, Mason, Plumber
   2. Contact Phone number – Mobile number of the contact. In case there exists a contact in database with that phone number, system presents the user with the details of the contact.
   3. Contact name (Mandatory) – Full name of the contact
   4. Contact address (Optional) – Free text. Address of the contact
   5. Location (Optional) – System suggests with already entered location to avoid spelling mistakes
   6. Town / City (Optional) - System suggests with already entered city / town to avoid spelling mistakes
   7. Land line number (Optional)
   8. Email (Optional)

REQ-6-2: On selecting “SUBMIT” button, project requirements are validated and inserted into database.

REQ-6-3: On saving project requirements first, Visit section should be included in the Project Details entry screen.

REQ-6-4: On selecting “CANCEL” system should take user to customer entry form screen.

## Add / update customer’s visit

### Description and Priority

Priority: High

Add / update customer’s visit to Beautywares along with details of the visit i.e. which products he saw, what is the status of his inspection, when should the sales / marketing executive follow-up next – A customer can visit one or more times related to his project.

### Stimulus/Response Sequences

To do

### Functional Requirements

## View list of follow-ups with filters on type

### Description and Priority

Priority: High

View list of follow-ups with filters on type (site visit or phone call or email), status, marketing executive, sales executive, area / location, customer

### Stimulus/Response Sequences

TODO

### Functional Requirements

TODO

## Add / update a follow-up

### Description and Priority

Priority: High

Add / update a follow-up – In case a follow-up task is not automatically created by the system, user can chose to add a follow-up. In case there is a change in a follow-up user can update details in follow-up. When an executive follows-up with customer, the user will update the follow-up record with the response from customer.

### Stimulus/Response Sequences

TODO

### Functional Requirements

TODO

## Assign owner for follow-up

### Description and Priority

Priority: High

Assign owner for follow-up in pending status to specify who is responsible to do the follow-up – Marketing Coordinator assigns follow-up tasks to Marketing Executive and Sales Executive

### Stimulus/Response Sequences

TODO

### Functional Requirements

TODO

## Get list of follow-ups for the (current) day with filter on users

### Description and Priority

Priority: High

Get list of follow-ups for the (current) day with filter on users – Sales Executive and Marketing Executive uses this function to find out the list of follow-ups to be done by them for today or tomorrow.

### Stimulus/Response Sequences

TODO

### Functional Requirements

TODO

## Get a report on customers with open requirements

### Description and Priority

Priority: High

Get a report on customers whose project requirements are still not addressed – Management of Beautywares want to know the list of customers whose project requirements are still left open there by keep prospective sales pending. They may use this report to improve the follow-ups and negotiations done by sales and marketing executive with customers.

### Stimulus/Response Sequences

TODO

### Functional Requirements

TODO

## Get a report on number of calls in date range

### Description and Priority

Priority: High

Get a report on number of calls that were made for given date range (by default show from beginning of month till date) on each call type

### Stimulus/Response Sequences

TODO

### Functional Requirements

TODO

## Get a report on number of offers that were made

### Description and Priority

Priority: High

Get a report on number of offers that were made listing how many project requirements were converted to sales, how much we lost to other companies and how much are still in follow-up. This report can be both in numbers (count) as well as in rupees (value of the requirement)

### Stimulus/Response Sequences

TODO

### Functional Requirements

TODO

# Other Non-functional Requirements

## Performance Requirements

Any screen should respond back within 3 seconds to show the results of user action.

## Security Requirements

REQ-4-2-1: User password should be hashed and stored

REQ-4-2-2:

## Software Quality Attributes

REQ-4-3-1: As the system is built iteratively, it should be extensible to support requirements of subsequent iterations. One of the principles that aid this is the adoption of layered approach and MVC patterns.

REQ-4-3-2: As the system is going to be deployed in a place where there is lack of IT professional, it should be easy to maintain which includes starting, stopping the server and archiving the database.

REQ-4-3-3: All the functionalities should be testable and preferably test cases have to be automated. This is essential to support regression testing during future iterations.

REQ-4-3-4: Wherever possible screens should have tool tip or help text to guide the user.

REQ-4-3-5: Navigation should be intuitive. User should navigate maximum of 3 levels to achieve a business goal.

REQ-4-3-6: Internationalization should be used. No literals should be used in between code. They should be separated from program logic.

REQ-4-3-7: The name “Beautywares” should not figure in the program logic so that the software can possibly be reused or rebranded.

## Business Rules

<List any operating principles about the product, such as which individuals or roles can perform which functions under specific circumstances. These are not functional requirements in themselves, but they may imply certain functional requirements to enforce the rules.>

# Other Requirements

None

# Appendix A: Glossary

None

# Appendix B: Analysis Models

None

# Appendix C: To Be Determined List

None