1. Project Title, Team name, Version, Date

Title: Marketing Effects Report Generator (MERG)

Team Name: Team H

Version: 1.0

Date: 10/25/2019

1. Overview

The Marketing Report Generator is a web application that pulls data from various online tools, the data is then consolidated and displayed on a web page. The application is used by the account managers of [White Stone Marketing](https://www.whitestonemarketing.com/), a digital marketing agency, to create marketing reports for their clients. The purpose of the report is to convey the results of the current marketing strategy and to facilitate the elicitation of future strategies. The report is presented via a secure website, during scheduled meetings, as the participants are remotely located.

1. Glossary

Users:

1. Account Managers (AM)- employees of White Stone Marketing. (typically, service ~20 clients)
2. Inn Owners - The clients of White Stone Marketing.
3. Senior Account Managers (SAM) - The supervisor of Account Managers

Terms:

* + - 1. Clearance Level – used to determine which pages the user will be allowed to view upon logging in.
      2. Profile – refers to the database record which holds user’s information including but not limited to ID, Name, Email, ClientID, API Key, and Clearance Level.
      3. Edit - in reference to user profiles, to edit, means to create, remove, update, or display.

1. System Overview Diagram

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1. Functional Requirements

Include at least 10 user requirements

**User Requirements**

1. Account Managers must be able to login to the Marketing Report Generator page.
2. Account Managers must be able to generate the reports.
   1. Account Managers must be able to specify which Inn Owner the report is generated for.
   2. Account Managers must be able to specify the date range the report is generated for.
   3. Account Managers must be able to specify any combination of sources the report is generated from.
      1. Possible Sources: Google Analytics, MailChimp, Facebook, Cart Stack, Trip Tease, Think Reservations. (TBD)
3. Account managers must be able to access everything the Inn Owners can access.
4. Inn Owners must be able to login to view the report page.
5. Inn Owners must NOT be able to view other Inn Owners’ report page.
6. Inn Owners must be able to view all previously generated reports.
7. The Senior Managers must be able to edit Account Managers profiles.
8. The Senior Managers must be able to edit Inn Owners profiles.
9. The Senior Managers must be able to access everything the Account Managers can access.
10. system requirements

TODO: FULL TEAM

Assumptions:

* + - 1. The database has been created
      2. The Senior Account Managers’ profiles have been added to the database.
      3. User has navigated to the login screen for all user.

General System Requirements

System should redirect non-authenticated users to login page.

System should query database for relevant information based on Metrics provided by SAM. (Generate Report)

System should query various APIs for requested data.

System should generate a new web page.

System should populate page with graphs, charts, etc. to visually represent data retrieved from APIs.

Senior Account Managers Interactions:

System must authenticate user.

System should gather username and password via online form.

System should compare credentials entered by user to those stored in the database

System should retrieve user type from data base.

System should redirect to SAM page. (assuming credentials were valid).

System should have forms which allows SAM to edit user profiles.

Create form should allow SAM to provide user’s profile info

Update form should allow SAM to update user’s profile info

1. System should allow SAM to display all account managers.
2. System should allow SAM to display all Inn owners.
3. System should allow SAM to generate marketing reports
   * + - 1. System should allow SAM to select Inn Owner from a drop-down menu.
         2. System should allow SAM to choose a Start date from JavaScript calendar.
         3. System should allow SAM to choose an End date from JavaScript calendar.
         4. System should allow SAM to choose sources for report data from list(checkboxes).
         5. System should allow SAM to indicate they would like the report to be generated. (Generate report Button).

Account Managers Interactions:

System must authenticate user.

System should gather username and password via online form.

System should compare credentials entered by user to those stored in the database

System should retrieve user type from data base.

System should redirect to IO page. (assuming credentials were valid).

Each IO will have a unique page, URL for the page will have a unique identifier (ex. *clientid/index.html*)

System should allow AM to generate marketing reports.

System should allow AM to select Inn Owner from a drop-down menu.

System should allow AM to choose a Start date from JavaScript calendar.

System should allow AM to choose an End date from JavaScript calendar.

System should allow AM to choose sources for report data from list(checkboxes).

System should allow AM to indicate they would like the report to be generated. (Generate report Button).

Inn Owners Interactions:

System must authenticate user.

System should gather username and password via online form.

System should compare credentials entered by user to those stored in the database

System should retrieve user type from data base.

System should redirect to IO page. (assuming credentials were valid).

System should allow IO to view marketing reports.

System should fetch list of URLs from database.

System should display a list of URLs in the form of hyperlinks.

a few essential non-functional requirements.

TODO: FULL TEAM

1. References

Similar software and systems can be cited here.