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Abstract

This document is created for CRM Application System to list all the product features and functionalities to be available for the users

**Product requirement document**

CRM Application

**Project Title:** Customer Relationship Management System

**1. Introduction**

The Customer Relationship Management (CRM) software solution is designed to enhance customer interaction, streamline processes, and improve profitability. It provides a centralized platform for managing customer data, tracking sales, marketing efforts, and customer support activities.

**2. Objectives**

* To centralize customer information for easy access and management.
* To streamline sales and marketing processes.
* To improve customer service and support.
* To provide analytics and insights for better decision-making.

**3. Features**

**User Authentication and Authorization**

* Secure login and role-based access control to ensure data confidentiality and integrity.

**CRM Company Management**

* **Company Profiles**: Users can create and manage company profiles with the following fields:
  + **Name**: The name of the company.
  + **Website URL**: The Company’s website URL.
  + **Description**: A brief description of the company.

**CRM Contacts Management**

* **Contact Profiles**: Users can create and manage contact profiles associated with companies, including:
  + **Full Name**: The full name of the contact.
  + **Email**: The contact's email address.
  + **Contact Number**: The contact's phone number.

**CRM Opportunity Management**

* **Opportunity Tracking**: Users can create and manage sales opportunities with the following fields:
  + **Name of Opportunity**: The name of the sales opportunity.
  + **Value**: The monetary value of the opportunity.
  + **Stages**: A sub-master for tracking the stage of the opportunity, including options:
    - Suspect
    - Qualification
    - Price Proposal
    - Value Proposition
    - Won
    - Lost
    - Dormant

**4. User Roles**

* **Admin**: Manages users, roles, and system settings. Has access to all features and functionalities.
* **Sales Manager**: Manages Company, contacts and opportunities, and oversees opportunity management.

**5. Technology Stack**

* **Frontend**: HTML, CSS, JavaScript (React.js)
* **Backend**: Node.js
* **Database**: SQL Server

**6. User Interface Design**

* Clean and intuitive user interface (UI) design with easy navigation and accessibility.
* Responsive design to ensure compatibility across various devices and screen sizes.

**7. User Story & User Journey**

**7.1 User Stories**

* **CRM Company Profile Management**: As a user, I want to perform create/update/view/delete operations for company to better understand the organizations we deal with.
* **CRM Contact Profile Management**: As a user, I want to perform create/update/view/delete operations of contact information to keep track of key individuals within client companies.
* **CRM Opportunity Profile Management**: As a user, I want to perform create/update/view/delete operations for sales opportunities so that I can track their progress through different stages to improve sales forecasting and performance.

**7.1.1 User Journey**

1. **CRM Company Profile Management**
   * The user logs into the CRM system.
   * The user navigates to the 'Companies' section.
   * The user creates a new company profile by entering the company name, website URL, and description, then clicks 'Save'.
   * The user can view, update, or delete company profiles as needed.
2. **CRM Contact Profile Management**
   * The user navigates to the 'Contacts' section.
   * The user adds a new contact by entering the full name, email, and contact number, then clicks 'Save'.
   * The user can view, update, or delete contact profiles as needed.
3. **CRM Opportunity Profile Management**
   * The user navigates to the 'Opportunities' section.
   * The user creates a new opportunity by entering the opportunity name, value, and selecting the current stage from a picklist, then clicks 'Save'.
   * The user updates the opportunity stage as it progresses, selecting the appropriate stage from the picklist.
   * The user closes the opportunity as 'Won', 'Lost', or 'Dormant' based on the outcome.

**8. Security Considerations**

* Data encryption in transit and at rest to protect sensitive information.
* Regular security audits and updates to mitigate potential vulnerabilities.

**9. Deployment**

* Cloud deployment (e.g., AWS, Azure) for scalability, reliability, and accessibility.
* Continuous integration and deployment (CI/CD) pipeline for automated testing and deployment.

**10. Conclusion**

The Customer Relationship Management System aims to revolutionize customer interaction by providing a comprehensive solution for managing customer data, sales opportunities, and managing contacts and companies. By enhancing customer engagement, productivity, and decision-making, the CRM system empowers organizations to achieve their business goals effectively and adapt to dynamic market environments.