**Project backlog – User Stories**

**Team 29**

**Epic 1: CRM Integration**

*User Story 1: As a WAMSI project manager, I want to effectively manage and track interactions with project contacts.*

Acceptance Criteria:

* The CRM integration should allow importing and exporting of contact information.
* Contact information should inherit schema utilized by Access.
* The CRM integration should support adding notes and updates related to interactions with contacts.
* The integration should provide a user-friendly interface for searching and sorting contacts based on various criteria.

Tasks:

* Research available CRM integrations for SharePoint and evaluate their suitability.
* Select and integrate a CRM solution that aligns with the project's requirements.
* Design the user interface for displaying and interacting with CRM data.
* Implement the import/export functionality for contact information.
* Develop the ability to associate contacts with specific projects.
* Implement the feature to add, view, and edit interaction notes for each contact.
* Implement search and sorting functionality based on different contact attributes.
* Perform thorough testing to ensure data accuracy and system stability.

Epic 2: Event Management and Scheduling

*User Story 1: As a WAMSI project manager, I want to create and manage events within the CRM SharePoint Database, so that I can organize and track various business activities.*

Acceptance Criteria:

* The system should allow users to create events with a title, description, date, time, location, and associated contacts.
* Users should be able to categorize events by type (e.g., meetings, conferences, follow-ups).
* Events should be displayed in a calendar view.
* Users should be able to edit and delete events.
* Notifications should be sent to participants when an event is created or modified.
* Events should be searchable based on title, date, and type.

Tasks:

* Design the event creation form with necessary fields.
* Implement the database structure to store event data.
* Develop the calendar view to display events.
* Create the functionality to edit and delete events.
* Implement notifications for event creation and updates.
* Integrate search functionality for events.

*User Story 2: As a WAMSI member, I want to schedule appointments with clients through the CRM SharePoint Database, to manage my meetings efficiently.*

Acceptance Criteria:

* Users should be able to propose multiple time slots to clients for appointments.
* The system should notify users when clients accept or propose alternative time slots.
* Appointments should automatically sync with users' personal calendars (e.g., Outlook).
* Users should be able to reschedule or cancel appointments.
* The system should provide a clear overview of upcoming appointments.
* Users should be able to track the status of each appointment (confirmed, pending, cancelled).

Tasks:

* Design the appointment scheduling interface.
* Implement the proposed time slots functionality and notification system.
* Integrate calendar synchronization with external tools (e.g., Outlook integration).
* Develop the rescheduling and cancellation features.
* Create a dashboard to display upcoming appointments and their status.

*User Story 3: As a WAMSI project manager, I want to analyse the event and appointment data in the CRM SharePoint Database, to make informed decisions.*

Acceptance Criteria:

* The system should generate reports showing the distribution of event types over time.
* Managers should be able to filter and visualize event data by different criteria (e.g., type, date, contact).
* Reports should be exportable in formats like PDF or Excel.
* Data should be presented in easy-to-understand graphs and charts.

Tasks:

* Design report templates for different types of analyses.
* Implement data visualization tools for generating graphs and charts.
* Develop filters and sorting options for the reports.
* Integrate export functionality for reports in various formats.

**Epic 3: Contact Interaction Tracking**

*User Story 2: As a WAMSI member, I want to log my interactions with project contacts so that I can keep track of communication and follow-ups.*

Acceptance Criteria:

* Users should be able to log interactions with project contacts, including calls, emails, meetings, and notes.
* Each interaction log should include a timestamp, type of interaction, and description.
* Interaction logs should be linked to the respective contact's profile.
* Users should be able to view a history of interactions for each contact.

Tasks:

* Design the user interface for logging interactions and viewing interaction history.
* Implement the functionality to log various types of interactions (calls, emails, meetings).
* Create a database structure to store interaction logs and associate them with contacts.
* Develop the ability to display interaction history on the contact's profile.
* Implement the timestamp and details capture for each interaction log.
* Test the interaction logging feature thoroughly to ensure accuracy and completeness.

**Epic 4: Automated Follow-up Reminders**

*User Story 3: As a WAMSI member, I want the system to remind me of scheduled follow-ups with project contacts so that I can maintain timely communication.*

Acceptance Criteria:

* Users should be able to set follow-up dates for contacts.
* The system should send automated reminders to users for scheduled follow-ups.
* Reminders should be sent via email or within the SharePoint platform.
* Users should have the ability to mark follow-ups as completed.

Tasks:

1. Design the user interface for setting follow-up dates and managing reminders.
2. Develop the functionality to schedule follow-up dates for contacts.
3. Implement the automated reminder system using email notifications or in-platform alerts.
4. Create a mechanism for users to mark follow-ups as completed and add notes if necessary.
5. Test the reminder system to ensure timely and accurate notifications.

**Epic 5: Access Control and Member Restriction**

*User Story 1: As a WAMSI system administrator, I want to ensure that only authorized members can access and view sensitive project contact information.*

**Acceptance Criteria:**

* Access to the SharePoint database should be restricted to registered and authenticated users only.
* Non-members should not be able to view any project contact information.

**Tasks:**

* Implement user registration and authentication: Integrate a secure authentication mechanism to allow only registered users to access the system.
* Create an access control dashboard: Develop a dashboard where administrators can manage user roles and permissions.
* Test user registration and authentication thoroughly to ensure security.
* Test role-based access control with different scenarios to verify that users can only access appropriate data.