

IT Project Meeting 10/08/21 Minutes

Attendees: Qiqi (The Client), Walter, Richard, Parit, Yujian, ShangZhe

Meeting began at 5:29pm. Qiqi agreed to have the meeting recorded.

Qiqi starts off with stating that we will have 4 meetings this semester (this included). CRM Project was described as a business card management software. Input business cards into the website to be able to access for management.

Richard asks whether these business cards are from other people and would be a website, to which Qiqi affirms.

Qiqi describes functionality requirements of the software are CRUD for cards, search functionality for cards, customisable tags for each business card (e.g occupation) -- which can be used for search. She also describes a display for cards in a 'box' grid view (as in LMS dashboard.) Clicking the thumbnail of a card leads to a redirection to the card and being able to write / view / update user inserted notes regarding the cards.

Richard asks how the cards are inserted. They would be inserted by the user into the database.

On the topic of platforms, Qiqi states that it is best to develop a website. Also hints and including a login functionality to allow multiple users, administrator roles and user roles. At the moment (for the first sprint) users could manage the cards they insert / own. Current number of customers to the site unknown.

Pep asks about what fields would like to be recorded for each card. Qiqi replies with Name, Phone number, Email, Job title, Company name, customizable fields, additional notes.

Richard asks about the 'card details page.' Qiqi states that it would not only show the users card details as well as be able to append a note to the card about additional information. Richard presses for what information. Qiqi requests for functionality to add information in the form of long notes or additional fields for each card.

Walter attempts to clarify whether blob notes or additional fields are required; insofar it is open choice.

Walter asks about the security and authentication of the users. Qiqi states that security is a good quality to have, and wants the card to be securely stored.

Pep asks what the storage of these cards will be used for. Qiqi confirms that by using tags she could quickly search contacts. Search could be done by tags, name, company name, and depending on ability, search by any terms and return relevant cards.

Richard says we could have an arbitrary search filter. A normal search option that searches by keyword(s) or a field and value search? Qiqi says it would be fine to prototype an initial search feature, then go into these specifics.

Qiqi is open to answering questions in list form through online correspondence.

Qiqi confirms the layout of the system to show cards in a 3xm grid of cards.

For now Qiqi states it's sufficient to work on the business cards.

Yujian asks about the other 3 meetings. Where Qiqi discloses the preferred meeting times for her commitment of the course, with week 3 being the first preferred time frame.

Meeting ended at 5:47pm.