First Meeting with client

Date

10/08/21

Participants

- The client
- @ Yujian Wang
- Walter
- @ Richard Li
- Parit
- ShangZhe

Goals

- Requirement elicitation

Discussions:

- Meeting began at 5:29pm. the client agreed to have the meeting recorded.
- the client 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 the client affirms.
- the client 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, the client 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. the client replies with Name, Phone number, Email, Job title, Company name, customizable fields, additional notes.
- Richard asks about the 'card details page.' the client 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. the client 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. the client 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. the client 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? the client says it would be fine to prototype an initial search feature, then go into these specifics.
- the client is open to answering questions in list form through online correspondence.
- the client confirms the layout of the system to show cards in a 3xm grid of cards.
- For now the client states it's sufficient to work on the business cards.
- Yujian asks about the other 3 meetings. Where the client 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.

User requirement table:

As a	I want	So that	Meaning for front end	Meaning for back end

user	To register my account	I can save/access my data via login later	Need to have a registration UI	Must store user ID and password in the database
user	Login to my account	I can access and edit my data in the database	Need to have login UI	User data must be stored individually for privacy reason
user	Add contact details including Name, Phone number, Email, Job title, Company name, tags, and additional notes	I can view it later on	-	Contact entity must have Name, Phone number, Email, Job title, Company name, tags, and additional notes attributes
user	Edit the contact detail	I can update the contact in case someone change their contact detail	Must include an edit button for each contact in the UI	Must have a function that update the row of the table when the user finalize their editing
user	Delete the contact detail	Remove the unwanted contact	Must include a delete contact button for each contact in the UI (or embed it in the edit UI)	Must have a function that delete the row of the table when the user decide to delete
user	Universally search for the contacts	I can filter the contact that I want to find	Must include universal search bar	Have a function to query every row of the contact table that include the matching string
user	Look at the contact list in “box (like canvas)” style	I can read through the list of contact easily	Simple form of each of the contact detail must be represented with a box	-
user	View more detailed version of each contact by clicking on one of the box	Easily access the notes and more detailed information I assign to each of the contact	Must have a more detailed version of the contact window	-