Ninox Requirements Capturing Document

# Project Information

Project Name:

Project Lead:

Date:

## Overview

Provide a brief overview of the project, its objectives, and the context in which the database will be used. Describe the purpose of the database and its intended functionality.

## Current Processes

Describe the existing business processes that are currently being used. Include details about how consultants manage leads, handle lead handovers, and any document management processes. Specify if there are any specific functionalities, calculations, or views that are currently in use.

## Transferring from Microsoft Access

Specify if the project involves transferring existing databases from Microsoft Access to Ninox. If applicable, provide details about the Access databases, including the structure, tables, and functionalities that need to be replicated in the Ninox database.

# Business Requirements

## Lead Management

Describe the requirements related to lead management. Include details about how leads are captured, tracked, and managed within the database. Specify any specific fields, forms, or functionalities that are necessary for lead management.

## Lead Handover

Specify the requirements for lead handover to clients. Describe the process and any specific steps that need to be captured within the database. Include details about how the lead handover is initiated, tracked, and documented.

## Document Management

If there is a need for document management within the database, outline the specific requirements. Specify the types of documents that need to be managed, any version control or access permissions needed, and how documents should be associated with leads or other relevant entities.

## Functionality and Views

Detail any specific functionalities or calculations that are required within the database. This can include custom workflows, automation, calculations, or data analysis requirements. Describe any specialized views or reports needed to provide an overview of the data or to facilitate decision-making.

## Additional Requirements

Capture any additional requirements or considerations that are specific to this project. This can include integration needs, security requirements, user roles and permissions, or any other important factors that need to be taken into account.

## Deliverables

Specify the expected deliverables from the development team based on the captured requirements. This can include the creation of the Ninox database, specific forms or views, reports, or any other relevant components.

## Timeline and Milestones

Outline the project timeline, including important milestones and deadlines. Specify any dependencies or critical path activities that need to be considered.

## Approval

Project Lead:

Date: