SIO - Presentation 2

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Summary

1 — 2 — 3 — 4 — 5

1 Chosen CRM to the University of Aveiro

2 Non-Functional Requirements

3 Functional Requirements

4 CRM Demo

5 Conclusion
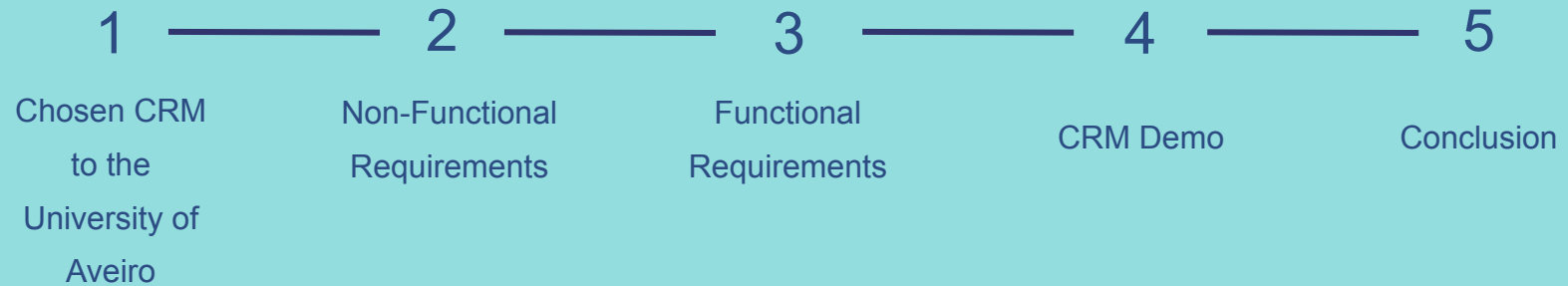
Chosen CRM to the UA

CiviCRM®
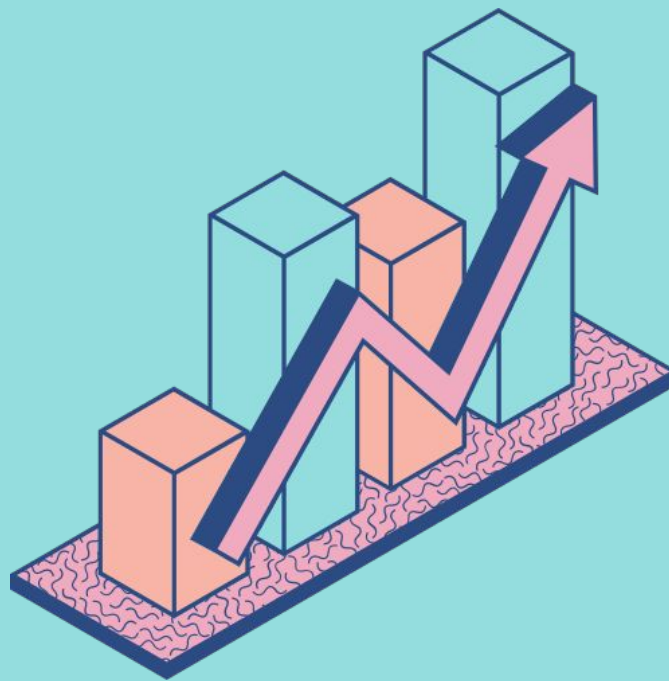
- Built to organizations rather than companies
- Organizational management oriented
- Customizable complex contact management
- Track all interactions
- Free

Non-Functional Requirements Analysis

Requirement	Accomplished
Customizability	✓
Accessibility	✓
Security	✓
Reporting and analytics	✓
Integration with existing systems	✓
Support and community	✓
Availability	✓
Scalability	✓

Functional requirements analysis

Requirement	Accomplished
Manage contact information	✓
Track and manage all interactions	✓
Send targeted emails	✓
Report generation	✓
System Integration	✓

Manage Contacts, Track Interactions and Send Targeted Emails

Manage contact information

❏ Create new contacts;

❏ Edit and change info in the contacts;

Track and manage all interactions

❏ Registration of phone calls and emails;

❏ Schedule emails and phone calls;

Send targeted emails

❏ Send emails to specific targets and groups;

Report Generation and System Integration

❖ This 2 requirements are not completely met.

❖ Although it is possible:

    ➢ Generate Reports not in the UA context:
- Generating financial and economic Reports;

    ➢ Integrate Systems using the CiviCRM API:
- Allows to accessing and manage data from UA;

❖ For this reason, we consider this 2 requirements **half-accomplished**.

Functional requirements analysis

Requirement	Accomplished
Access from mobile devices	✓
Automation of tasks and workflows	✓
Customization of fields, forms and workflows	✓
Communication with other CRMs	✓
Integration with AI services (Bots)	✓

Mobile devices, Automation and Customization

Access from mobile devices

❏ Responsive Website;

❏ Experience might not be as optimized as a dedicated app;

Automation of tasks and workflows

❏ Allows to automate actions, improving efficiency;

❏ Schedule reminders, trigger actions, emails;

Customization of fields, forms and workflows

❏ Customize contact and email fields, forms and layouts;

❏ Define workflows that fit the university's needs;

Communication with other CRMs and AI services

❖ This 2 requirements are not completely met.

❖ Although it is possible:

➢ Communication with other CRMs needs:
■ Code integration with the API;
■ Other CRMs to have this option;

➢ Integration of AI services needs:
■ An already implemented BOT adapted to respond to students;
■ Code integration;

❖ For this reason, we consider this 2 requirements **half-accomplished**.

CiviCRM Demo
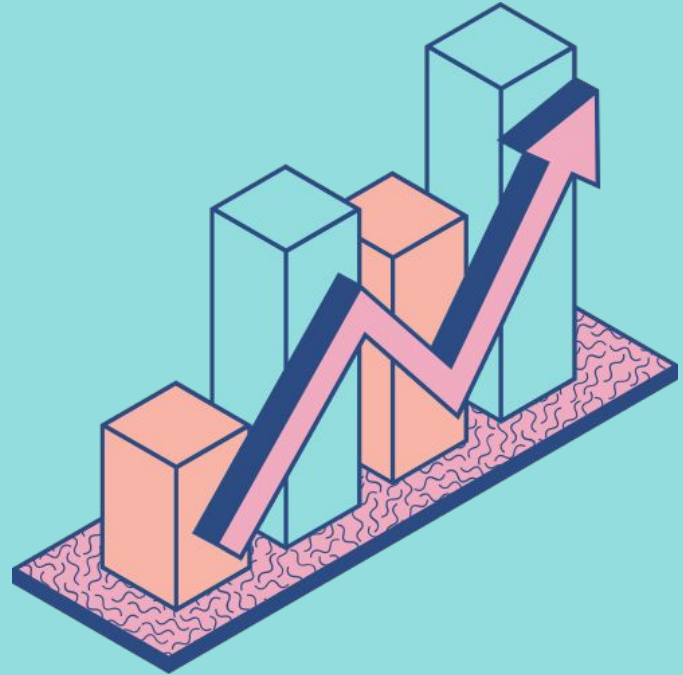
Conclusion

- University of Aveiro has multiple types of requirements
- CiviCRM is useful for contacts and emails managements
- Lacks customization and integration
- Could be a powerful tool with lots of potential for UA