**CUSTOMER RELATIONSHIP MANAGEMENT**

**Module 1: User Management**

**Description:**  
This module handles creation and maintenance of user accounts, roles, and access rights.

**Functional Requirements:**

* Create, edit, and deactivate user profiles
* Assign and manage roles (e.g., admin, sales rep, support agent)
* Enforce password policies and multi-factor authentication
* Log user login/logout times and major actions
* Allow self-service password reset via email or SMS

**Assigned Team Member(s):** \_\_\_\_\_\_\_\_\_\_

**Module 2: Sales Tracking**

**Description:**  
Tracks leads, opportunities, quotes, and conversions to give sales teams full visibility into their pipeline.

**Functional Requirements:**

* Capture new leads manually or via web forms
* Assign leads to sales reps based on territory or workload
* Define opportunity stages (e.g., qualification, proposal, negotiation)
* Generate and send quotes, track quote status
* Forecast revenue by stage and expected close date
* Send automated reminders for follow-up tasks

**Assigned Team Member(s):** \_\_\_\_\_\_\_\_\_\_

**Module 3: Customer Support**

**Description:**  
Manages incoming customer inquiries, cases, and resolutions to ensure timely, consistent service.

**Functional Requirements:**

* Create and track support tickets from email, chat, or phone
* Categorize cases by type (technical, billing, general) and priority
* Set service-level agreements (SLAs) and escalate when deadlines approach
* Provide agents with a searchable knowledge base
* Integrate with chatbots or self-service portal for common questions
* Collect customer satisfaction ratings after case closure

**Assigned Team Member(s):** \_\_\_\_\_\_\_\_\_\_

**Module 4: Marketing Automation**

**Description:**  
Automates campaign creation, audience targeting, and lead nurturing to boost engagement.

**Functional Requirements:**

* Build multi-step email campaigns with drag-and-drop editor
* Segment contacts by demographics, behavior, or purchase history
* Score leads based on interactions (opens, clicks, form submissions)
* Trigger follow-up actions (emails, tasks, notifications) at key milestones
* Track open rates, click-through rates, and unsubscribes
* Sync campaign results back to sales and reporting modules

**Assigned Team Member(s):** \_\_\_\_\_\_\_\_\_\_

**Module 5: Reporting & Analytics**

**Description:**  
Generates dashboards and reports to measure performance across all CRM functions.

**Functional Requirements:**

* Preconfigured dashboards for sales pipeline, support load, and campaign ROI
* Custom report builder with filters, groupings, and chart types
* Schedule automated report delivery via email or shared link
* Drill down from summaries into individual records
* Export data to CSV or connect to external BI tools

**Assigned Team Member(s):** \_\_\_\_\_\_\_\_\_\_

**Module 6: Data Integration & Security**

**Description:**  
Ensures CRM data stays accurate, up to date, and securely connected to other systems.

**Functional Requirements:**

* Import/export customer and transaction data in CSV or via API
* Map and transform fields between CRM and ERP/e-commerce platforms
* Run nightly deduplication and data-cleaning routines
* Encrypt data at rest and in transit
* Manage user consent and privacy flags (opt-in/opt-out)
* Audit changes for compliance reporting

**Assigned Team Member(s):** \_\_\_\_\_\_\_\_\_\_