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| http://www.xtuple.com/sites/all/themes/xTupleCom/images/logo.png  **PROPOSAL TERM PROJECT: CASE STUDY - PART B**  CRM tool - xTuple | Submitted by:  Kathleen Wilson (300591546)  Lesley-Ann Comissiong (300715690)  Liliya Artyukh (300702887)  Rodrigo Domiciano de Almeida (300797050)  Submitted to: Professor Michael Burke  Course Code: COMP321-063  Date: 13-Mar-2015 |
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**Group Members:**

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| 1. Kathleen Wilson |
| 2. Lesley-Ann Comissiong |
| 3. Liliya Artyukh |
| 4. Rodrigo Domiciano de Almeida |

**Project Title:** xTuple

**Rationale:** Briefly state your rationale for choosing this software tool.

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| We have chosen that software because it is an open source product and would allow us to learn the tool at a deeper level. |

**Objectives**: Configure xTuple for a fictitious small company

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| 1. Configure settings and practice with Universal Address Book |
| 1. Configure settings and practice with Incident Management |
| 1. Configure settings and practice with Opportunity Management |
| 1. Configure settings and practice with To-Do List |
| 1. Configure settings and practice with Reports (Database settings) |
| 1. Configure settings and practice with Project Management |

**Industry Relevance:** Briefly state how well the objectives of this project fit with the two job descriptions that you have identified in your industry research.

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| The jobs that we found online require understanding and experience with CRM tools. The requirements do not specify any particular CRM solution. We are going to use a particular tool for this project - xTuple to learn about main functional areas of the CRM solution and to get hands on experience. We chose open source tool because it will allow us to explore the solution in more detail.  *A couple of jobs that we looked at:*  For Business Analyst, CRM job – requirement is “Broad knowledge of all CRM users/functions”  (<http://jobs.adp.com/ca/toronto/client-services/jobid6998458-business-analyst-crm>)  For CRM Database Specialist job – requirement is “experience in CRM database administration and design”  (<https://sjobs.brassring.com/1033/ASP/TG/cim_jobdetail.asp?jobId=681084&partnerid=25024&siteid=5154&codes=IND>) |