SRR: Requirements and Stakeholders

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Evolve or Dissolve

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**Business Problem Statement**

Alfa Flooring company is unable to build customer relationships because the current POS system does not have customer relationship functions. Therefore, a customer relationship application is needed to create and maintain loyal customers, create detailed purchase requests, and allow marketing to current and potential customers.

**Research Question**

How can Alfa Flooring build a system, which will allow sales associates and management to create and maintain loyal customers, create detailed purchase requests, and market to current and potential customers?

**Motivation**

Alfa Flooring company knows that if we understand and know our customer better, we can increase our sales and create customer loyalty. The new customer relations system will satisfy both goals and separate itself from the competitors in the market.

**Introduction - narrative and background of problem**

Alfa Flooring Company is a growing company that is trying to better manage the interactions with both current and potential customers and sales associates. Alfa Flooring knows that if they identify their customers by receiving feedback on products, sales, and ideal marketing, they will have better knowledge about how to create loyal customers and who to market to. The company would also like to track how many touch points it took to complete a sales order.

**Description of system and its purpose**

Currently Alfa Flooring has minimal customer database on the current point of sale system. The company is not collecting any demographics or creating quotes for potential sales. The new platform will assist sales associates to build rapport with new customers and existing customers. This rapport is produced by documenting the company's interactions with the customers, which will produce leads, quotes and final sales. This will help to reach out to customers who have abandoned quotes. This program will also keep track of customer history, so we can create loyal customers by marketing techniques, such as doing follow up on flooring projects, mailing birthday greetings or holiday cards. In addition, it will help generate referrals and predict future customer needs.

**Identification of Stakeholders**

**Customers**

The customer role in this will be giving us permission to collect their personal data and use it for follow ups and marketing purposes.

**Business Accounts (Contractor)**

A special customer role for businesses to order in bulk and to supply inventory to their customers.

**Sales Associates**

Sales associate role will be collecting the customer data and entering it into the AFCRS. They will also be using this program to create follow ups, store quotes and customer project plans.

**Management Team**

Management team will have an indirect role. The team will be looking at reports within the system that will give them information about the customers and the sales associate performance.

**Information Technology Team**

The team will have a technology role that will continually upgrade the system and fix any issue that arises and continually add new features that are requested.

**Identification of Requirements, nested features and functions**

**Requirements**

* Enter new customer data.
* Match customer data with customer relation system purchase information.
* Document interaction with sales associates and customers.
* Create quotes/project plans
* Sales/quotes history
* Generate reports
* Sales associate scheduling options

**Features**

* The ability to add new customer to system
* The ability to search customer name or account number
* Make and store notes of conversation with customers, specifically about flooring needs
* To be able to create quotes/project plans from customer interactions
* Be able to pull customer’s sales and quotes
* To create reports
* The ability to schedule appointments

**Functions**

* To enter a new customer, you will need to click on “Create new customer” then, fill out the customer form.
* To search for a customer, you will need to type in the customer’s name in the search bar and then, click on the magnifying glass. If the customer is in the system, the customer profile will be displayed.
* To enter in notes about the customer, select Customer Information Tab, type customer information then, click on “Quote Project Plan Tab” and click on the notes field.
* To create a quote, select Customer Information Tab, type customer information then, go to the “Quotes/Project Plan tab” and enter in product information.
* To pull customers' historical sales and quotes, select Customer Information Tab, type customer information. Select “Sales/Records” tab. Screen will show customer history.
* For management to create report, select Customer Information Tab, type customer information then, select “Sales/Records tab”. Select the report from the drop-down menu of the following reports: Store sale report, Sales Associate report, Customer Satisfaction Report, Open Quote report, Alfa Customer Loyalty report, and One-time Purchase report.
* To schedule an appointment, select Customer Information Tab, type customer information then, on the “Quote project plan”, fill out the appointment details on the right hand of the screen.

**Use Cases/User Stories**

|  |  |  |
| --- | --- | --- |
| **Requirements** | **Use Cases** | **User Story** |
| Enter new customer data. | Sales associates requests to enter customer information into AFCRS. | I am a sales associate; I want to add new customer data into POS. |
| Match customer data with customer relation system purchase information | Sales associate opens a customer quote by searching for customers in POS database and in doing so opens the customer relation information stored on the AFCRS. | I am a sales associate; I want to enter customer data into AFCRS, so that I can keep track of this customer. |
| Document interactions with sales associates and customers | Customer and sales associate build a project plan based on the customers need and    preferences, tile, wood or carpet etc., financial requirements and all concerns associated with the project. | I am a sales associate; I want to document customer interactions in AFCRS. |
| Generate sales leads from current customers | Sales associated follows up on uncompleted sales. | I am a sales associate; I want to conduct a follow up, so I can make another touch point with my customer. |
| Produce quotes/project plans | Sales associate enters a quote for a customer. | I am a sales associate; I want to use AFCRS to generate quotes/project plans, so that the customer knows details about planned floor project. |
| Sales/Quotes history | Sales Associate can view historical customer information | I am a sales associate and want to pull up the history for a particular customer to see what items were purchased. |
| Generate reports | Sales associates follow up on completed sales to ascertain satisfaction levels. | I am a manager; I want to generate a sales report, so I can see how many sales my store has.   I am a Manager; I want to generate a satisfaction report, so I can see how satisfied my customers are.   I am a Manager; I want to generate a sales associate performance report, so I can see how well sales associates are performing.  I am a Sales Associate; I want to generate a report on customer referral, so that I can create new leads. |

**Functional Requirements Document or Computer Software Configuration Item (CSCI)**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Requirements** | **Owner/**  **Primary Stakeholder** | **Secondary Stakeholder** | **Module/**  **Subsystem Level** | **Features** | **Functions** | **Test Case** | **Priority (Revised at PDR)** | **Non-Functional/Quality Criteria** |
| Cashier, Sales Associate and managers enter in new customers data | Cashier  Sales Associates  Managers | Customers | POS System | Add User | Click on "Create new customer"  Fill out customer form. | New customers entered successfully | High | Security  Scalability |
| Match customer data (name, address, phone) with customer purchase information. | Sales Associates  Managers | Customers | POS and AFCRS/Purchase order information | Search | Type customer name in the search field and press enter or click on magnifying glass. Customer Profile displays | Sales associate opens a customer project | High | Security  Scalability |
| Document interactions with sales associates and customers | Sales Associates | Managers  Customers | AFCRS/Interactions-  customer notes | Notes | Click on “Quotes Project Plans Tab”. and click on the notes field. | Sales associates can enter customer project info. |  | Usability |
| Create quotes/project plans | Sales Associates | Customers | AFCRS/Quotes and plans | Sales/Record tab | Select Customer Information Tab, type customer information. Select “Quote Project Plans” tab and enter in product information and click on preview. | AFCRS/generates quotes based on info. | High | Usability  Performance |
| Sales/quotes history | Managers  Sales Associates |  | AFCRS/Historical database | Table in Sales/Record tab | Select Customer Information Tab, type customer information. Select “Sales/Records” tab. Screen will show customer history. | AFCRS/generates or displays previous orders | Low | Usability  Reliability |
| Generate reports. | Managers |  | AFCRS/Analytics | Create Report | Select “Sales/Records tab”  Select the report drop down from the following list of reports: Store sale report, Sale Associate report, and customer satisfaction report,.  Click “run report”  Report will be downloaded as a csv. spreadsheet. | AFCRS/generates sales report, leads statistics, and satisfaction reports. | High | Usability  Scalability |
| Sale associate scheduling | Sales Associates | Customers | POS/AFCRS/  Marketing/customer information | Appointment Details | On the “Quote project plan” enter the customer's name and fill out the appointment details on the right hand of the screen. | AFCRS/customer database generates contact lists | Low | Usability  Reliability |

**Non-Functional Requirements (NFC) List and Description**

Availability- The system shall be available during all business hours from 8 A.M to 8 P.M.

Maintainability- The system shall be maintained by in house IT staff, all maintenance will be scheduled during non-business hours.

Performance- The system shall be built using hardware and software best practices, which allow only milliseconds of lag time between keystrokes and button clicks and return data. Report generation shall take no more than 5 seconds to completion.

Reliability- The system shall be built with redundancy so that no to nearly a 5 nines operational uptime is achieved.

Scalability- The system is not anticipated to grow beyond what current hardware and software can achieve and so scalability is not a great concern. If, however in the future and Alfa Flo grows beyond this systems capability, it shall be portable to a higher performance system.

Security- The system shall be built with cyber security, a great concern. In addition, it shall be firewalled off from the internet using firewall network best practices and all staff with access to the backend shall be vetted for security concerns. Sales associates will not have the capability to copy the electronic data in mass. However, they can print project plans and invoice information for single customers.

Usability- The software shall be designed with the user in mind. There are many similar applications which can be used as a model. However, during development the user will be involved in usability testing to ensure that the software is intuitive and user friendly and that it provides the features it is intended to.