Document Overview:

This document provides information on the software to be created & its detailed requirements.

- **Project Overview:**
- **Purpose and Objectives:**
- Our CRM software, named "NexaConnect," is designed not only as a tool to manage customer information but also to truly understand customer behavior, needs, and preferences, ensuring we are always a step ahead in offering tailored experiences.

Target Audience/User Profiles:

- **Sales Executives:** Daily use for tracking leads, updating deal progress, and coordinating with team members.
- **Marketing Professionals:** Used for segmenting customer data, tracking campaign efficacy, and understanding customer preferences.
- **Customer Support Representatives:** Daily use for managing customer queries, tracking issues, and ensuring timely resolution.
- **Senior Management:** Periodic use for strategic insights, monitoring team performance, and decision-making.

Existing Systems:

- The "LegacyCRM" system, is slow, not cloud-based, and lacks integration capabilities. It also doesn't offer mobile access, a major limitation for our on-the-go sales team.

Functional Requirements:

- **Lead & Contact Management:** Detailed profiling, history logs, and communication tracking
- **Opportunity Management:** From lead qualification to deal closure, stages, probabilities, and timelines
- **Campaign Management:** Ability to launch, track, and analyze campaigns. Integration with email and SMS marketing tools
- **Service Request Management:** Ticket creation, assignment, resolution tracking, and feedback collection
- **Document Management:** Centralized storage for contracts, proposals, and related documents with version control
- **Task & Calendar Management:** Scheduling meetings, reminders, and task assignments
- **Customizable Dashboards:** Drag-and-drop widgets to allow users to personalize their main screens

Non-functional Requirements:

- **Performance:** Seamless operation even with 50,000 records pulled up in a single report
- **Security:** Multi-factor authentication, audit trails, and data backup mechanisms
- **Usability:** Quick action buttons, predictive text fields, and voice command features
- **Interoperability:** Seamless data transfer between modules without redundancy

Preferred Technologies:

- Cloud-hosted solution using a microservices architecture
- Preference for PostgreSQL as the database and a combination of Python (backend) and React (frontend)

Budget & Timeline:

- A budget cap of $500,000, targeting a phased launch approach over 12 months

Integration Needs:

- **ERP System "FinUltimate":** For real-time revenue and invoicing data
- **Email System "MailBlitz":** For email campaigns and tracking
- **Chat Platform "ChatElite":** For real-time customer chat support

Data Requirements:

- **Behavioral Data:** Web page visits, product interests, and interaction patterns
- **Transactional Data:** Detailed records of every purchase, return, and inquire
- **Feedback Data:** Surveys, feedback forms, and net promoter scores

UI/UX Preferences:

- Dark and light mode
- Interactive data visualization
- A dedicated mobile app for iOS and Android
- User experience tailored based on role (e.g., different interface for sales vs. support)

Regulations & Compliance:

- GDPR, CCPA, and HIPAA compliant due to the sensitive nature of some customer information

Scalability & Future Growth:

- Should support up to 500,000 customers with an anticipated expansion to new global markets in 3 years

Support & Maintenance:

- Dedicated account manager, 24/7 technical support, and quarterly performance reviews

Training Needs:

- On-site training for 2 weeks post-launch, followed by monthly webinars.
- Access to an always-on virtual assistant for quick queries

Miscellaneous Preferences:

- Vendor must have a portfolio that includes at least two similar CRM implementations in the B2C space