Contact Relationship Management - MyCRM

Minor Project

IBM Career Education

Disclaimer

This Software Requirements Specification document is a guideline. The document details all the high level requirements. The document also describes the broad scope of the project. While developing the solution if the developer has a valid point to add more details being within the scope specified then it can be accommodated after consultation with IBM designated Mentor.

INTRODUCTION

The purpose of this document is to define scope and requirements of a Simple Contact Relationship Management Tool - MyCRM for the employee Intranet of a large business house. The proposed system will allow the non-sales employees to manage relationship with their contacts. MyCRM is expected to provide:

1. A very simple clutter free user interface.
2. Exceptional ease of use for tracking interactions with their contacts and get a complete 360-degree view.

This document is the primary input to the development team to architect the solution the project.

System Users

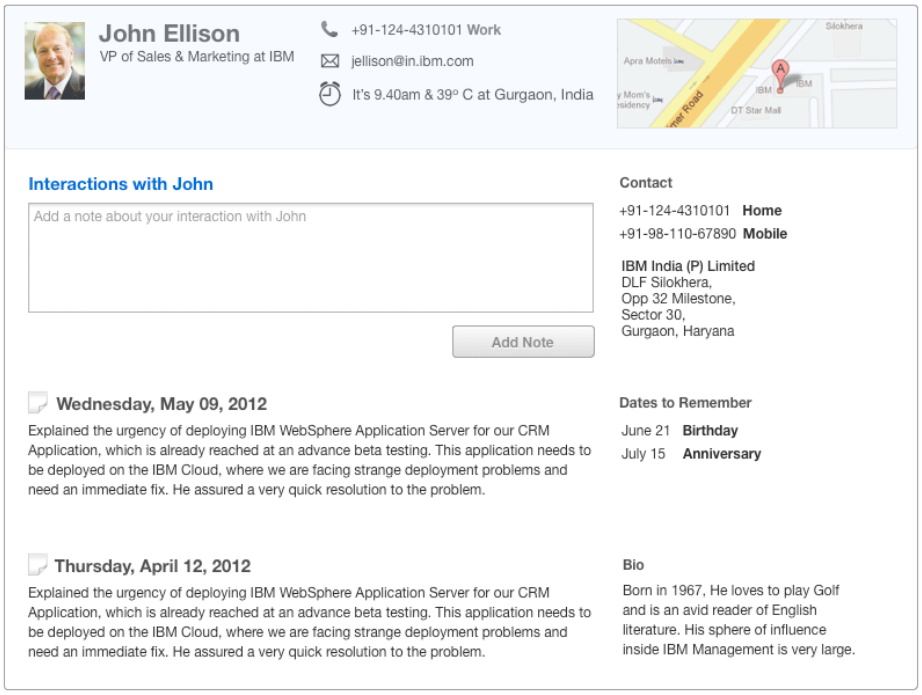
The entire staff of the business house is expected to benefit from the contact relationship management tool, MyCRM.

Assumptions

1. MyCRM will be integrated with the existing company's intranet and therefore it will leverage the existing Intranet's authentication mechanism.
2. All contact details will be uploaded using a CSV file. Alternatively, they may be added/updated to the desired table in the DB2 backend directly.

REQUIREMENTS

MyCRM will allow users to manage relationship with their contacts. The user interface for the same is outlined below.



The tool will display the list of contacts of the logged in employee. Upon clicking on a contact from the list, a contact detail screen, as shown on the previous page will open. On the top bar 3 data elements will be obtained through mash-up. These elements are (a) local time of the city mentioned in the address, (b) local temperature, and (c) Google map of the location. The key fields in contact details include photograph, first name, last name, designation, organization and its address (address, street, city, country), work/home/mobile phones, e-mail, brief bio, and important dates (birth day and anniversary).

Interactions

All past interactions will be listed in a chronological order starting from the most recent one. A text box below the top bar will allow immediate entry of interaction. Clicking on “Add Note” button will save the entered note.

Dates to remember

If today’s dates matches with any of the “dates to remember” then that date and the label – “Dates to remember” will be highlighted in blue color. All such entries will be highlighted in the list view as well.

Optional Requirements

Since MyCRM is expected to use Intranet’s authentication, for the purpose of this project, entering user name will take you to the user’s Contact List View screen.

DEVELOPMENT ENVIRONMENT

MyCRM will be developed as a web application using Java/JSP and DB2 database. Eclipse will be used as the IDE for the same. You may consider using a JavaScript framework like jQuery/Prototype/ Scriptaculous.

The mash-up information will have to be obtained from suitable web services/API. For example, weather information may be obtained from Yahoo Weather located at http://developer.yahoo.com/weather/ URL; location map from Google Maps; and time from http://www.timeanddate.com/services/api/time-api.html URL. These are only some examples and the students are free to choose services/API on their own.