XLead

Business Requirements Document (BRD)

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1. Project Overview

Project Name: XLead

Project Manager:

Project Sponsor: Experion Technologies

Date:

2. Purpose of the Document

This document serves three key purposes:

2.1 Overview

XLead aims to simplify customer relationship and deal management by centralizing data. It supports features like customer and deal tracking, BO stage updates, document attachments, and real-time dashboards to ensure efficient and effective CRM operations.

2.2 Guidance

A structured roadmap will guide the development team through clear phases, ensuring alignment with business goals. It will outline detailed business and functional requirements for smooth execution, while also addressing non-functional aspects like performance, scalability, and security, along with data handling and system constraints.

2.3 Reference

The project plan serves as a communication tool to align stakeholder expectations, ensuring everyone is on the same page. It establishes a shared understanding of project goals and execution strategies and acts as a foundational reference to maintain consistency throughout development and implementation.

3. Problem Statement

The existing deal management process is largely manual, involving the uploading of deal PDFs to designated drive folders and granting access to relevant team members. This method is inefficient, time-consuming, and prone to errors. The lack of automation affects workflow efficiency, reduces accuracy, and slows down deal execution. As a result, there is a need for a centralized system that improves deal tracking, collaboration, and management efficiency.

4. Project Objective

XLead helps businesses track sales opportunities from start to finish with a simple dashboard that shows where each deal stands. Team members can easily create new deals, see customer information, and follow what steps have been taken, with different permission levels for different roles.

5. Scope Definition

5.1 In-Scope

- Deal creation, modification and tracking for new and existing opportunities.
- Sales pipeline management with stage categorization and progress tracking.
- Privilege-based access control for secure and authorized deal handling.
- Timeline visualization for active deals and historical tracking.
- Analytics for deal performance and sales progress.
- Dashboard to view deals related information.
- Manage and store all documents associated with deals.
- Manage contacts and companies associated with deals.
- Support for customizable fields to capture deal-specific data.
- Export functionality for data management.
- Mobile-responsive design for access across devices.

5.2 Out-of-Scope

- Probability tracking
- Real-time collaboration tools for Business Opportunity Owners, Managers, and Sales Teams
- Alerts and notifications regarding stage changes, deal closures etc.
- Financial accounting and invoicing functionalities
- AI integration for automated verification of documents

- Report Generation

6. Stakeholders

Primary Stakeholders

Account Manager

- **Role:** Holds an overview on the deals handled by the Salesperson under them.
- **Interests:** Maintaining CRM system security and optimizing deal closure efficiency.

Salesperson

- **Role:** Add and manage new deals, find business opportunities, and ensure smooth deal execution.
- **Interests:** Make deals easier to access, simplify deal management, and work more efficiently

7. Business Requirements

7.1 Dashboard & Analytics Module

Requirement ID	Role(s)	Feature	Description	Priority	Data Source
RQ-001	Salesperson & Accounts Manager	Dashboard with Deal Analytics	Provides overview statistics of deals	High	CRM Database

7.2 Deal Management Module

Requirement ID	Role(s)	Feature	Description	Priority	Data Source

RQ-002	Salesperson	Add CRM Deal Information	Adding deal information to the pipeline	High	CRM Database
RQ-003	Salesperson	Deal Management & Pipeline Tracking	Enables user to update and track deals efficiently across different pipeline stages	High	CRM Database

7.3 Company Management Module

Requirement ID	Role(s)	Feature	Description	Priority	Data Source
RQ-004	Salesperson & Accounts Manager	View Companies details	Improves visibility into companies associated with deals, enabling tracking and management	High	CRM Database
RQ-005	Salesperson & Accounts Manager	Filter Company Details	Add column-level text filters (e.g., Contains, Starts With) to help Salespersons target specific	High	CRM Database, Date-Tracking Functions

			companies and Accounts Managers track distribution effectively.		

7.4 Contact Management Module

Requirement ID	Role(s)	Feature	Description	Priority	Data Source
RQ-006	Salesperson & Accounts Manager	View Contact Details with filters	Provides a detailed view of contact information	High	CRM Database

7.5 Data Management Module

Requirement ID	Role(s)	Feature	Description	Priority	Data Source
RQ-007	Salesperson & Accounts Manager	Data Export	Allows easy sharing of reports in XLSX/CSV format for analysis and record-keeping.	High	CRM Database

7.6 Document Management Module

Requirement ID	Role(s)	Feature	Description	Priority	Data Source
RQ-008	Salesperson	Document Management	Provides storage and management	High	Document Storage System

			of deal-related documents		

7.7 Mobile Responsiveness Module

Requirement ID	Role(s)	Feature	Description	Priority	Data Source
RQ-009	Salesperson & Accounts Manager	Mobile Responsive Interface	Allows access to the CRM system from mobile device with optimal viewing and interaction experience	High	CRM System

8. Functional Requirements

8.1. Function: FN-CRM-01 - Deal Analytics Dashboard

- **Associated BR ID**: RQ-001
- **Function Description**: Offers detailed analytics view of the deal pipeline through a dashboard.
- **Acceptance Criteria**:
  - Displays total open pipelines count with progress indicator.
  - Lists **Top Companies** based on **Pipelines Won** with amount breakdown.
  - Bar chart visualizing **Open Pipelines Amount by Stage.**
  - Bar chart visualizing **Revenue Won by Month** showing deal value grouped by closing date.
- **Functional Dependencies**: Integration with CRM Database.

8.2. Function: FN-CRM-02 - Deal Information Entry

- **Associated BR ID**: RQ-002
- **Function Description**: Enables Salesperson to input and manage deal details for customers.
- **Acceptance Criteria**:

    - Salesperson can create deals with mandatory fields (e.g., Customer, Value, Contact).
    - Supports addition of custom fields with specified data types (text, date, Numerical, Boolean).
    - Validates required fields and checks for duplicates.
- **Functional Dependencies**: Integration with CRM Database.

8.3. Function: FN-CRM-03 - Deal Management and Tracking

- **Associated BR ID**: RQ-003
- **Function Description**: Supports adding, updating, and tracking deals across pipeline stages.
- **Acceptance Criteria**:
    - Salesperson can create and update deals with required fields.
    - Tracks changes with timestamps and user info.
    - Provides deal history for audits.
- **Functional Dependencies**: Integration with CRM Database.

8.4. Function: FN-CRM-04 - Company Overview

- **Associated BR ID**: RQ-004
- **Function Description**: Displays a list of companies linked to deals.
- **Acceptance Criteria**:
    - Shows company names with columns: Company Name, Company Website, Status and Company Phone Number.
    - List updates dynamically upon load or refresh.
- **Functional Dependencies**: Integration with CRM Database.

8.5. Function: FN-CRM-05 - Company Metrics Display

- **Associated BR ID**: RQ-004
- **Function Description**: Shows key metrics of companies.
- **Acceptance Criteria**:
    - Displays tiles for total company count, active companies and inactive companies.
    - Updates count in real-time or on refresh.
- **Functional Dependencies**: Integration with CRM Database.

8.6. Function: FN-CRM-06 - Company Details Filtering

- **Associated BR ID**: RQ-005

- **Function Description**: Allows filtering of company details for focused management.
- **Acceptance Criteria**:
  - Each column has filter functionality like Contains, Does not contain, Starts with, Ends with, Equals and Does not equal.
  - Includes a reset option to clear filters.
  - Filter results update the table dynamically in real-time.
- **Functional Dependencies**: Integration with CRM Database.

8.7. Function: FN-CRM-07 - Total Company Count for Accounts Manager

- **Associated BR ID**: RQ-005
- **Function Description**: Displays the total number of companies across all Salespersons for Accounts manager.
- **Acceptance Criteria**:
  - The Company page displays a tile showing the total number of companies assigned to the salesperson.
- **Functional Dependencies**: Integration with CRM Database.

8.8. Function: FN-CRM-08 - Contact Details Display

- **Associated BR ID**: RQ-006
- **Function Description**: Provides view of contact information.
- **Acceptance Criteria**:
  - Displays contact details (name, company, email, phone no, status).
- **Functional Dependencies**: Integration with CRM Database.

8.9. Function: FN-CRM-09 – Filtered and Custom Contact Views

- **Associated BR ID**: RQ-006
- **Function Description**: Enables users to filter contact details efficiently using various conditions, improving data accessibility and management.
- **Acceptance Criteria**:
  - Allows filtering of contacts by Name, Phone, Email, and Status.
  - Provides multiple filter conditions such as Contains, Does Not Contain, Starts With, Ends With, Equals, and Does Not Equal.
  - Includes a reset option to clear filters.
- **Functional Dependencies**: Integration with CRM Database.

8.10. Function: FN-CRM-10 – Export of Data

- **Associated BR ID:** RQ-007
- **Function Description:** Facilitates the export of details for external analysis and reporting purposes.
- **Acceptance Criteria**:
    - An **"Export"** button is provided on the required pages with options to export data in **XLSX** and **CSV** formats.
    - The **columns to be exported** can be selected via a **column chooser**.
    - The export reflects the **current view**, including any **applied filters**.
    - The downloaded files are structured and formatted for immediate use.

- **Functional Dependencies**: Integration with CRM Database and Data Export Function.

8.11. Function: FN-CRM-11 - Document Handling

- **Associated BR ID**: RQ-008
- **Function Description**: Manages storage and retrieval of deal-related documents.
- **Acceptance Criteria**:
    - Users can upload and attach files (.pdf, .docx, .xlsx).
    - Allows secure deletion of attachments.
- **Functional Dependencies**: Document Storage System with size restrictions and security.

8.12. Function: FN-CRM-12 - Mobile Responsive Web Application

- **Associated BR ID**: RQ-009
- **Function Description**: Ensures the entire CRM web application is fully functional and optimized for viewing on mobile devices.
- **Acceptance Criteria**:
    - All pages adapt automatically to mobile screen sizes.
    - Navigation menu transforms into a toggle menu on smaller screens.
    - Interactive elements resize appropriately for touch interaction.
    - Charts, graphs and visual elements scale properly for mobile viewing.
    - Export function remains accessible on mobile devices.
- **Functional Dependencies**: Depends on responsive design tools, access to CRM data, and layout systems that adjust to different mobile devices.

9. Non-Functional Requirements

- **Performance:** System response time < 5 seconds for key operations, Support 500+ concurrent users
- **Security:** Privilege-based access control and Data encryption for sensitive information.
- **Usability:** Intuitive interface requiring minimal training, Consistent experience across desktop and mobile

10. Data Requirements

Data Element:

Deal Information

- **Description:** Details of all deals, including deal name, amount, stage, custom fields as defined by users and stage history.
- **Source:** Structured data containing deal records.
- **Format:** Structured format, either as a database or spreadsheet.
- **Dependencies:** CRM database for deal records.

Company Information

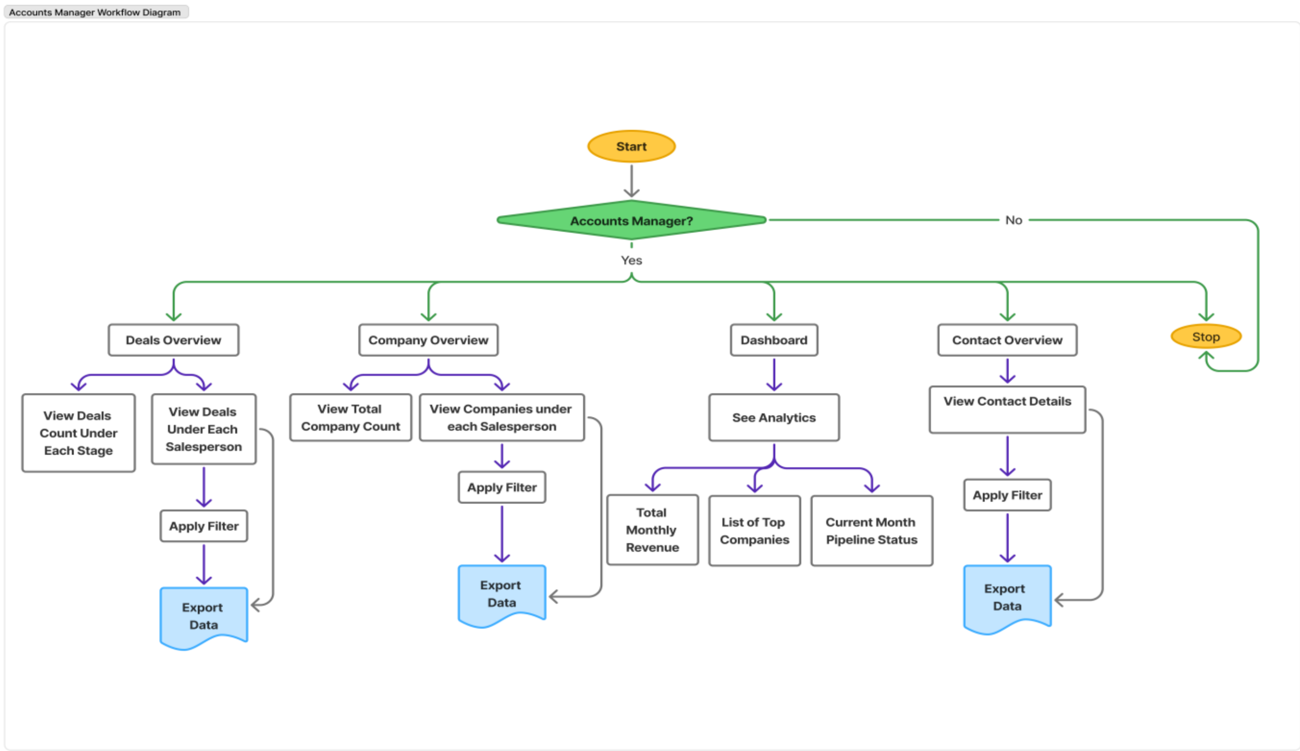
- **Description:** Details of companies, including company name, website and phone number.
- **Source:** Structured data containing company details.
- **Format:** Structured format, either as a database or spreadsheet.
- **Dependencies:** CRM database for company records.

Contact Information

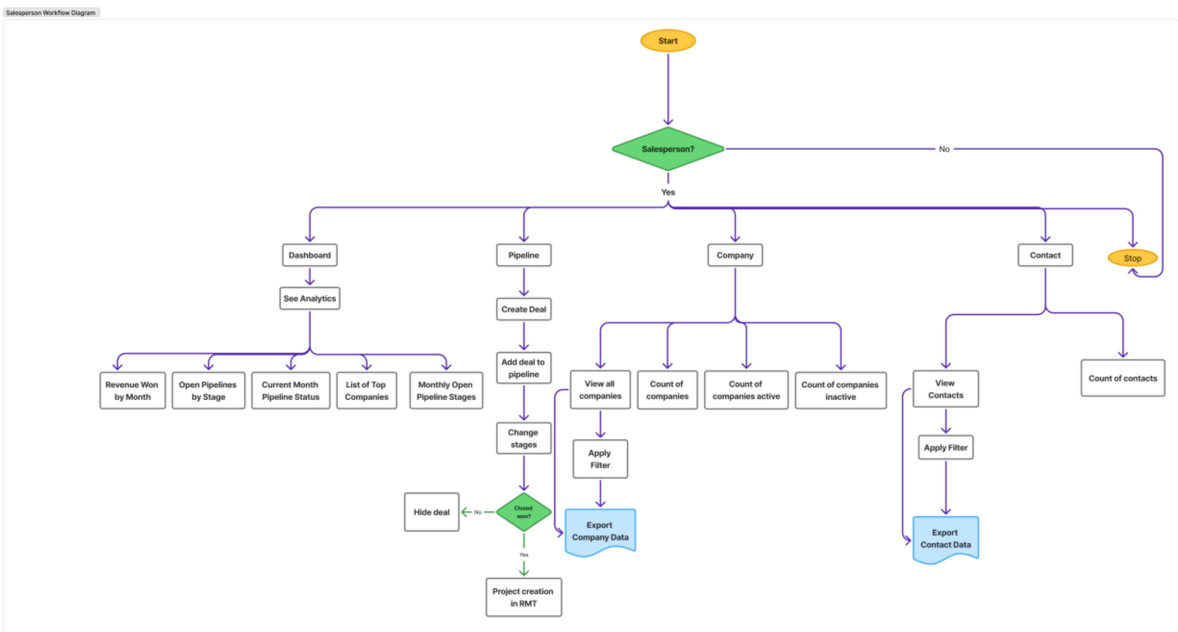
- **Description:** Details of contacts, including name, email, phone number, and associated company name.
- **Source:** Structured data containing contact details.
- **Format:** Structured format, either as a database or spreadsheet.
- **Dependencies:** CRM database for contact management.

11. Workflow

Accounts Manager User Flow:



Salesperson User Flow:



12. Constraints and Assumptions

12.1 Constraints

- Must integrate with existing login environment

12.2 Assumptions

- Sales teams will adopt new digital processes
- Mobile access is critical for field operations

13. Risk Analysis

Risk	Mitigation Strategy
User resistance to change	Comprehensive training program and intuitive UX design
Technical integration challenges	Early prototyping and testing with existing systems
Data migration complexities	Phased implementation approach with data validation
Performance issues with large data sets	Performance testing and optimization before launch
Security vulnerabilities	Regular security audits and adherence to security standards

14. Sign-off and Risk Approval

Name	Job Title	Role	Date	Sign-Off
Sreelekshmi G	Technology Lead	Mentor	09/04/2025	Discussed
Pratheesh Kumar	AGM - Internal Systems	POC	09/04/2025	
Subhash K Joseph	Consultant	POC	09/04/2025	

15. Appendix

15.1 Glossary

- **CRM**: Customer Relationship Management

15.2 Related Documents

- User Requirements Document
- System Architecture Document
- Database Architecture Document
- Project Plan