

Custom CRM System Requirement Specification

1. Introduction

This document describes the functional and non-functional requirements for the development of a custom Customer Relationship Management (CRM) system.

- **Project Name:** Custom CRM System
- **Date:** [Insert Date]
- **Prepared by:** [Author/Team Name]

2. Objectives

- Centralize customer data management.
- Streamline sales and support processes.
- Enhance communication and reporting capabilities.

3. Functional Requirements

3.1 User Management

- User authentication (login/logout).
- User roles and permissions (Admin, Sales, Support, Manager, etc.).
- User profile management.

3.2 Customer Database

- Add/update/delete customer records.
- View/search/filter customers.
- Track customer interaction history.

3.3 Sales Pipeline

- Create/manage deals and opportunities.
- Assign leads to users.
- Visualize pipeline stages.

3.4 Task & Activity Management

- Create, assign, and track tasks.
- Activity log for customer communications and tasks.

3.5 Reporting & Analytics

- Generate sales and activity reports.
- Export data (CSV, PDF).
- View dashboards with key performance metrics.

3.6 Integration

- Email integration (send/receive or sync emails).
- Calendar integration.
- API for third-party tools.

4. Non-Functional Requirements

- System performance: Fast response times for all operations.
- Data security: Encryption, role-based access, audit trails.
- Usability: Intuitive user interface across devices.

- Reliability: 99.9% uptime requirement; backup and restore support.
- Scalability: Support future user and data growth.

5. Data Model Overview

Entity	Description	Key Attributes
User	System users with roles	ID, Name, Email, Role, Password
Customer	Customer/company records	ID, Name, Contact Info, Status, Assigned User
Deal	Sales opportunities	ID, Name, Value, Stage, Customer, Owner
Task	CRM-related tasks	ID, Subject, Description, Due Date, Status, Assigned User
Activity	Customer interactions log	ID, Type, Date, Details, User, Customer

6. Assumptions and Constraints

- System will be accessed via web browser.
- All user data and actions are securely logged.
- Third-party integrations depend on their API availability.

7. Glossary

- **CRM:** Customer Relationship Management
- **KPI:** Key Performance Indicator
- **API:** Application Programming Interface

8. Approval

[Signatures/Names for approval]