

Business Requirements Document (BRD)

Project: SME Management System

Project Overview

The SME Management System is designed to help small and medium enterprises streamline core business operations such as financial tracking, task management, and customer relationship management. The system aims to centralize operations and improve efficiency through digital tools.

Business Objectives

- Simplify and automate SME financial tracking (invoicing, payments, expenses) - Improve task and workflow tracking with reminders and visual dashboards - Centralize customer records and interactions to support client management

Key Business Requirements

- Invoicing & Billing: Generate and track custom invoices. - Expense Tracking: Log daily and recurring expenses. - Task Management: Create, assign, and track tasks. - Notifications: Send automated reminders. - CRM: Store customer profiles, notes, and sales funnel stages. - Dashboard & Reports: Visual insights into operations. - Role-Based Access: Secure access based on user roles.

Scope

In Scope: - Financial Management (invoicing, expenses) - Task tracking with status updates - CRM functionality - Dashboard and reporting Out of Scope: - Integration with live bank APIs or tax systems - Advanced payroll or HR systems

User Roles

- Owner: Full system access - Accountant: Access to finance module - Staff: Access to tasks and CRM only

Success Criteria

- Working prototype with core features implemented - Clean, professional interface using ABSA branding - Role-based feature visibility - No real data used; demo-ready

Graph: Feature Focus Allocation

