








Sales App Module - Feature Spec.docx

[Status]

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Test	Test
UE	Writer- Help
UE	Writer - SDK
SE	SE Name
UX	Usability

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FEATURE CONCEPT**1 CONCEPT OVERVIEW****1.1 OVERVIEW**

Sales Hub is a the future Sales App module which will eventually contain all Sales capabilities.

1.2 DEFINITIONS & ACRONYMS**1.3 RELATED DOCUMENTS & LINKS**

Hyperlinks for additional resources including the SharePoint Document Set as well as the associated TFS entry and an other related features and/or resources.

- SharePoint Document Set
- TFS Feature

ID	Title	Work Item Type	Assigned To	State	Tags
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2 CONCEPT GOALS**2.1 GOALS**

- Describe the end to end scenario for which we want an integration between CRM and AX

2.2 NON GOALS

- Develop a full-featured CRM-AX connector

DETAILED SPECIFICATION**3 SCENARIOS, USER INTERACTION FLOW, & SOLUTION DESIGN**

PERSONAS:

3.1 SALES APP MODULE – PRIORITY 1**3.1.1 Roles**

REQ 1. Roles who have access to this app are

- Sales app access → now Sales, Enterprise app access

Commented [DD1]: May have been renamed

3.1.2 App Properties

REQ 2. The following settings must be used

Display Name Sales Pro

Name msdynce_salespro

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Description	Modernize your sales experience with this relationship management app.
Thumbnail	See below
Application URL	N/A

(The essential business solution for busy professionals who need to engage with customers while staying productive at work and on the go. Arrive prepared at every appointment and easily update your notes, tasks, and attachments – as well as important sales and service records – while the details are fresh in your mind. Dynamics 365 - Mobile custom gives salespeople, agents, and supervisors the best tools for managing their data and updating records and status – both online and offline.)

Note: Thumbnail can be found here:

<\\ermshare\public\Teams\UX\Icons\CRM Logos\All CRM Logos\Microsoft Dynamics Sales - Production Files\Microsoft Dynamics Sales>

[Sales Icons](#)



3.1.3 Site Map

REQ 3. The following Site map must be used:

AREA	SALES	SETTINGS	TRAINING
GROUPS	My Work	Business	Resources
SUB-AREAS	<ul style="list-style-type: none"> - Dashboards - What's New ? - Activities 	<ul style="list-style-type: none"> — Business Management — Templates — Product Catalog — Service Management — Mobile — Offline — Sync Error 	<ul style="list-style-type: none"> Help Center (https://go.microsoft.com/fwlink/p/?linkid=853224)
	Customers		
	<ul style="list-style-type: none"> - Accounts - Contacts 		
	Sales		
	<ul style="list-style-type: none"> - Leads - Opportunities - Competitors 	<ul style="list-style-type: none"> Customization 	
	Collateral	<ul style="list-style-type: none"> — Customizations — Solutions — Dynamics Marketplace 	
	<ul style="list-style-type: none"> - Quotes - Orders - Invoices - Products - Sales Literature 	<ul style="list-style-type: none"> System 	

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Marketing	Administrative
- Marketing Lists	Data
- Quick Campaigns	Management
Service	System Jobs
- Cases	Document
- Social Profiles	Management
- KB Articles	Auditing
Goals	Email
- Goals	Configuration
- Goal Metrics	Activity Feed
- Rollup Queries	Configuration
Tools	Rules
- Reports	Security
- Alerts	Office 365
- Calendar	Groups
	CRM App for Outlook
	Process Center
	Processes
	Application
	My Apps

Commented [AS2]: Daniel why do you think we should include them?

3.1.4 Dashboards

REQ 4. The following Dashboards must be available

***bold** = default

SALES

MARKETING

- Sales Activity Dashboard
- **Sales Activity Social Dashboard**
- Sales Dashboard
- Sales Performance Dashboard
- Microsoft Dynamics 365 Overview
- Microsoft Dynamics 365 Social Overview
- **Social Selling Assistant Dashboard**

Commented [DD3]: Changed from MARKETING. Need validation

Commented [DD4]: This comes as part of Social Selling solution

3.1.5 Business Process Flows

REQ 5. The following Business Process Flows must be available

PRIMARY ENTITY

PROCESS NAME

Lead	Lead to Opportunity Sales Process
Opportunity	Opportunity Sales Process

3.1.6 Entities

Remove Cases from Account / Contact Forms?

Commented [AS5]: don't think we should remove them, we've just added them to Sales

***bold** = default

Entity	Forms	Views	Charts
Account	<ul style="list-style-type: none"> - Account - Information (?) 	<ul style="list-style-type: none"> - Accounts Being Followed - Accounts I Follow - Accounts: Influenced Deals That We Won - Accounts: No Campaign Activities in Last 3 Months - Accounts: No Orders in Last 6 Months - Accounts: Responded to Campaigns in last 6 Months - Active Accounts - Inactive Accounts - My Active Accounts - My Connections (?) 	<ul style="list-style-type: none"> - Accounts by Industry - Accounts by Owner - Accounts By Territories - New Accounts By Month
Contact	<ul style="list-style-type: none"> - Contact - Information (?) 	<ul style="list-style-type: none"> - Active Contacts - Active Contacts Subgrid View - Contacts Being Followed - Contacts I Follow - Contacts: influenced Deals That We Won - Contacts: No Campaign Activities in last 3 months - Contacts: No Orders in Last 6 months - Contacts: Responded to Campaigns in Last 6 Months - Inactive Contacts - My Active Contacts - My Connections (?) 	<ul style="list-style-type: none"> - Contacts by Role
Competitor	<ul style="list-style-type: none"> - Competitor 	<ul style="list-style-type: none"> - All Competitors - All Competitors (summary) - Competitors Being Followed - Competitors I Follow - My Connections (?) 	
Lead	<ul style="list-style-type: none"> - Lead - Information (?) - 	<ul style="list-style-type: none"> - All Leads - All leads in current fiscal year - Campaign Leads - Closed Leads - Leads Being Followed - Leads I Follow - Leads Opened Last Week - Leads: Influenced Deals That We Won - Leads: No campaign Activities Sent - Leads: Older Than 6 Months 	<ul style="list-style-type: none"> - Incoming Lead Analysis by Month - Lead Generation Rate - Leads by Owner - Leads by Source - Leads by Source Campaign

Commented [DD6]: What about Quick View Forms and Quick Create Forms?

Commented [DD7]: What is this?

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Entity Forms Views Charts

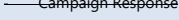
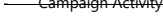
		<ul style="list-style-type: none"> - My Connections (?) - My Open Leads - Open Leads 	
<i>Opportunity</i>	<ul style="list-style-type: none"> - Opportunity - Information (?) 	<ul style="list-style-type: none"> - Closed Opportunities - Closed Opportunities in Current Fiscal Year - Lost Opportunities - My Closed Opportunities in Current Fiscal Year - My Connections (?) - My Open Opportunities - Open Opportunities - Opportunities Being Followed - Opportunities Closing Next Month - Opportunities I am a member of - Opportunities I Follow - Opportunities in Current Fiscal Year - Opportunities Opened Last Week - Opportunities Opened This Week - Recent Opportunities - Won Opportunities 	<ul style="list-style-type: none"> - Actual Revenue by Fiscal Period - Actual Revenue by Month - Deals Won vs. Deals lost - Deals Won vs. Deals Lost By Fiscal Period - Deals Won vs. Deals Lost By Owner - Estimated vs. Actual Revenue (By Fiscal) - Estimated vs. Actual Revenue (by Month) - Opportunity by Campaigns - Opportunity by Status - Revenue Generated by Campaign - Sales Leaderboard - Sales Pipeline - Sales Progress By Territory - Top Customers - Top Opportunities
<i>Quote</i>	<ul style="list-style-type: none"> - Quote 	<ul style="list-style-type: none"> - Active Quotes - All Quotes - My Connections (?) - My Quotes - Opportunity Quotes 	-
<i>Order</i>	<ul style="list-style-type: none"> - Order 	<ul style="list-style-type: none"> - Active Orders - All Orders - My Connections (?) - My Orders - Non Cancelled Orders 	<ul style="list-style-type: none"> - Actual Revenues By Fiscal Period - Actual Revenues By Month - Actual Revenues By Owner
<i>Invoice</i>	<ul style="list-style-type: none"> - Invoice 	<ul style="list-style-type: none"> - All Invoices - Closed invoices - My Connections (?) - My Invoices 	-
<i>Product</i>	<ul style="list-style-type: none"> - Product 	<ul style="list-style-type: none"> - Active product Bundles - Active Products, Families & Bundles - All Product Bundles - All Products, Families & Bundles - Draft product Bundles - Draft Products, Families & Bundles - Retired Product Bundles - Retired Products, Families & Bundles 	-
<i>Sales Literature</i>	<ul style="list-style-type: none"> - Sales Literature 	<ul style="list-style-type: none"> - All Sales Literature 	-
<i>Goals</i>	<ul style="list-style-type: none"> - Goal 	<ul style="list-style-type: none"> - Active Goals - All Goals - Closed Goals - My Active Goals - My Goals for This Period 	<ul style="list-style-type: none"> - Goal Progress (Count) - Goal Progress (Money) - Percent Achieved - Today's Target Vs. Actuals (Count) - Today's Target Vs. Actuals (Money)

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Entity	Forms	Views	Charts
Goal Metric	Goal Metric	<ul style="list-style-type: none"> My Group's Goals for This Period My Groups's Revenue Goals for This Period Active Metrics All Metrics Inactive Metrics 	
Rollup Query	Rollup Query	<ul style="list-style-type: none"> Active Rollup Queries All Rollup Queries Inactive Rollup Queries My Active Rollup Queries 	
Marketing Lists	Marketing List	<ul style="list-style-type: none"> Active Marketing Lists Campaign Marketing Lists Inactive Marketing Lists Lists Associated With The Owner Makreting Lists Used in last 6 Months My Active Marketing Lists My Connections (?) Unused marketing Lists 	
Campaigns	Campaign	<ul style="list-style-type: none"> All Campaigns and Campaign Templates All Campaigns for Current Fiscal Year Campaign Templates Inactive Campaigns Launched Campaigns List campaigns My Campaigns My Connections (?) 	<ul style="list-style-type: none"> Campaign Budget vs. Actual Costs (By Fiscal) Campaign Budget vs. Actual Costs (by Month) Campaign Type Mix
Quick Campaigns	Quick Campaign	<ul style="list-style-type: none"> All Quick Campaigns My Quick Campaigns 	
Territory	Territory	All Territories	
Activity		<ul style="list-style-type: none"> All Activities Closed Activities My Activities My Closed Activities My Team Member's Activities Open Activities Scheduled Activities 	<ul style="list-style-type: none"> Activities by Month Due Activities by Owner Activities by Owner and Priority Activities by Priority Activities by Type Activities by Type and Priority
Task	Task	<ul style="list-style-type: none"> All Tasks My Tasks 	-
Fax	Fax	<ul style="list-style-type: none"> All Faxes My Faxes 	-
Phone Call	Phone Call	<ul style="list-style-type: none"> All Phone Calls My Completed Phone Calls My Phone Calls 	-
Email	Email	<ul style="list-style-type: none"> All Emails My Draft Emails My Pending Emails My Received Emails My Received Emails with Unresolved Senders My Sent Emails 	-
Letter	Letter	<ul style="list-style-type: none"> All Letters My Letters 	-
Appointment	Appointment	All Appointments	-

Commented [DD8]: Is this even necessary?

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Entity	Forms	Views	Charts
Campaign Response		<ul style="list-style-type: none">- My Appointments- My Completed Appointments	
	 Campaign Response	<ul style="list-style-type: none">- All Campaign Responses- Campaign Responses- My Campaign Responses- Open Campaign Responses	-
Campaign Activity		<ul style="list-style-type: none">- All Campaign Activities- Campaign Activities- In-Progress Campaign Activities- My Campaign Activities- My Campaign Activities	-
	 Campaign Activity		
Recurring Appointment	<ul style="list-style-type: none">- Recurring Appointment	<ul style="list-style-type: none">- All Recurring Appointments- Closed Recurring Appointments- My Closed Recurring Appointments- My Recurring Appointments- Open Recurring Appointments	-