FedCLM App E2E Scenarios Template

Primary Persona:	Contract Managers, Subcontract Managers, Project Managers
Configuration Settings	Client: Web Client (Browsers: Chrome, Edge)
Problem / Opportunity Statement:	TechnoMile's FedCLM helps Contract Managers and they subordinates effectively maintain oversight and administer a Contract through every stage of its lifecycle. The solution assist in managing tasks such as Tracking Subcontractor Flowdown Clauses, and simplify Challenges such as managing a large library of FAR/DFAR Clauses across multiple lines of business.
Pain Points:	The standard usage of MS Dynamics for Contract Lifecycle Management requires manually copying and pasting, manually creating and maintaining relationships between records and manually implementing process, especially repeatable ones.
User Goals:	Centralize data, automate processes, and effectively maintain oversight and administer a Contract through every stage of its lifecycle.
Business Goals:	Track, administer and report on the progress of Contract Portfolio. Maintain complete visibility of Contract Portfolio. Track and report performance against Benchmarks and KPIs. Simplify processes and tasks that need to be performed at stages of a Contract lifecycle.
Triggers:	
Narrative Description (e.g., plans, evaluation, actions, objects, context, events):	TechnoMile's FedCLM helps Contract Managers and they subordinates effectively maintain oversight and administer a Contract through every stage of its lifecycle. The solution assist in managing tasks such as Tracking Subcontractor Flowdown Clauses, and simplify Challenges such as managing a large library of FAR/DFAR Clauses across multiple lines of business.

Detailed Steps	1. Opportunity - a. Add/Update- User can add, update and delete the Opportunity. b. Quick Create Contract - Contract can be created from Opportunity entity page by clicking button and filling the details in popped up form. 2. Contract - a. Add/Update - User can add, update and delete the Contract. b. Quick Create Subcontract - Subcontract can be created from contract entity page by clicking button and filling the details in popped up form. c. Quick Create Contract Mod - Contract Mod can be created from contract entity page by clicking button and filling the details in popped up form d. Quick Create Task Order - Task order can be created from contract entity page by clicking button and filling the details in popped up form e. Quick Create Contract Closeout - Contract Closeout can be created from contract entity page by clicking button and filling the details in popped up form f. Clone Contract - User can copy the contract details and create a new contract by clicking then ”Clone” button on contract entity form. g. Notifications - i. Email - Email will be sent to the owner of the contract if the field “Contract is at Risk” is set to “Yes” saying the contract is at risk. If user updates the field again to “No” then another email will be sent to owner saying risk is resolved. ii. On form - 1. TDI Warning Message - A warning message will be shown on the form when Actual revenue is less than 75% of Target revenue. 2. Small Business Plan Warning Message - A warning message will be shown if over small business goals contract lifetime is less that overall small business goal(%) of anticipated contract value. h. Renewal Process - User can renew the existing contract and the procedure and requirements are as follows, i. A contract must be expired meaning Contract Period End Date must be earlier than the current date. ii. A Contract Closeout must be completed for the contract and there should be at least one record in contract closeout grid. iii. After the above two conditions are fulfilled, a field “Send Approval for Renew” will be visible. User need to set this field value to “Yes”. iv. After setting this field to “Yes”, an email for approval with the details of the contract will be sent to the manager of the user. v. If manager clicks on “Approve” button in the email then an email is sent back to the user. Also after refreshing the page a button for renewing will be visible. vi. User needs to click on “Renew” button, a new contract is created with all the data from General and Clauses tabs of contract form. vii. If manager rejects the approval then button for renewing will not be shown. 3. Contract Clauses - a. Add/Update - User can add, update and delete clauses for a contract.

	b. Mandatory Flow Down - If mandatory flow down flag in clause is true then the clause will be added to Subcontract. 4. Contract Mod - a. Add/Update - User can add, update and delete contract mods. b. Approval Process - When user adds new contract mod, an email for approval will be sent to the manager of the user and all the fields of contract mod will be locked. If manager approves or rejects the contract mod then the fields will be unlocked. c. Call Order - User can create Call order for existing Contract Mod. The call order will be child to Contract mod. d. Subcontract - User can create Subcontract for existing Contract Mod. The Subcontract will be child to Contract mod. 5. Task Order - a. Add/Update - User can add, update and delete task order b. Mods - User can create Mods for existing Task Order. The Mod will be child to Task Order as well as the Contract. c. Subcontract - User can create Subcontract for existing Task order. The Subcontract will be child to Task order. 6. Subcontract - a. Add/Update - User can add, update and delete Subcontract. This can be done using simply filling the form as well as via quick create wizard. 7. Contract Closeout - a. Add/Update - User can add, update and delete Contract Closeout. This can be done using simply filling the form as well as via quick create wizard. 8. Federal Spending - In this tab user can see analytics information about accounts from our Analytics portal. 9. Audit History - User can view all the information about who has changed which field on the Contract. This tab will show the list of changes done on Contract. 10. Documents - User can add create folders and upload documents which will be uploaded on share point. 11. Reports - User can view reports created as per their requirements. Reports includes data in form of tables, charts and graphs. 12. Dashboards - This gives an overall idea about the data in the system. User can create dashboards using the reports as per the requirements.
Success Metrics:	1) Successfully saving above data for each record type referenced above 2) Successfully viewing the data for each record type reference above 3) Successfully receiving the email notifications and alerts 4) Successful execution of each of the processes described above