**FBO Connector E2E Scenarios Template**

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| Primary Persona: | Business Development (BD) Executive, Capture Managers |
| Configuration Settings | Client: Web Client (Browsers: Chrome, Edge) |
| Problem / Opportunity Statement: | TechnoMile’s FBO Connector helps government contractors make the most of fbo.gov by pulling Solicitations directly into Microsoft Dynamics for Sales and displaying them in context with live opportunities. The integration of FBO.gov centralize data and enables users to contextualize data from FBO.gov and track/report with accurate real time on pertinent information, such as NAICS codes & intelligence on opportunities all with the click of a button. |
| Pain Points: | The standard usage of MS Dynamics Sales in conjunction with FBO.gov requires the users to switch between the two User Interfaces/Screen to view and/or reference data. Data needs to be manually copied into the MS Dynamics for Sales in order to report on them. |
| User Goals: | Centralize data and enables users to contextualize data from FBO.gov and track/report with accurate real time on pertinent information, such as NAICS codes & intelligence on opportunities all with the click of a button |
| Business Goals: | Track and report on Opportunities with accurate real time on pertinent information and actionable intelligence |
| Triggers: | NA  |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | The integration of FBO.gov centralize data and enables Capture Managers to contextualize data from FBO.gov and track/report with accurate real time on pertinent information, such as NAICS codes & intelligence on opportunities all with the click of a button. |
| Detailed Steps | ***1) FBO - Solicitation Request: User can import FBO data into MS Dynamics by entering an FBO solicitation number in the Solicitation Number field, saving, and clicking "Get FBO Data"******2) FBO – Timeline: User can view all modifications made to the FBO solicitation by clicking on Timeline records and viewing the before and after information******3) FBO – Attachments: User can view attachments from FBO posted to the Opportunity-related Files after getting FBO data******4) FBO - Contact Roles: User can view contact roles from FBO posted to the Opportunity Contact Roles object of FedCapture after getting FBO data. Contacts are imported into the contact object with the account matching the GovCon Opp account and the contact being set as sourced from FBO******5) FBO - Batch Updates: Admins can configure an FBO daily update using the standard MS Dynamics Process Workflow. Batch updates will update all FBO fields and add any new attachments to the record******6) FBO - Single Updates: User can update FBO data by clicking "Get FBO Data". This will update all FBO fields and add any new attachments to the record******7) FBO – Configuration: Admin must configure FBO by setting up an FBOpen key and TM key. The TM key is linked to their FBO license amount and limits the number of FBO opps that are open.***  |
| Success Metrics: | 1. Successfully saving above data
2. Successfully viewing the FBO data in the Opportunity Form
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