 Functional Requirements Specifications

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| <Document Subject 1> | <Document Subject 2> |
| <Document Subject 3> | <Document Subject 4> |

**Functional Requirements Specifications**

 *Prepared for*

|  |  |
| --- | --- |
| **<Customer Name>** | **<Customer Logo>** |

 **Date**: Wednesday, 18 April, 2018

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| **Author:** | **Ashraf Badawi** |

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| **Role** | **Name** | **Company** |
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The undersigned has performed a thorough review of this document.

| **Role** | **Name** | **Company** |
| --- | --- | --- |
|  |  |  |
| Project Manager |  |  |
| Subject Matter Expert  |  |  |
|  |  |  |

Optional Reviewers

The undersigned has performed a review of this document

| **Role** | **Name** | **Company** |
| --- | --- | --- |
|  |  |  |

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# Introduction

The purpose of this document is to collect, capture, list, and document in details the business requirements specifications for <Customer Name> marketing, sales, customer service, and operations automation initiative in relation to Dynamics 365 Customer Engagement and RED365 Real Estate Vertical implementation. The overall solution will be based on <Microsoft Dynamics Product> as the platform augmented with RE365 vertical to be used as the base for the solution leveraging as much of the standard functionality that comes out of the box as well as the xRM / PowerApps concept and capabilities to deliver <Customer Name> needed functionality. The document will contain the business requirements specifications and the business processes related to the following Modules:

* Marketing
* Sales
* Customer Service
* Field Services
* Connected IoT Devices to Felid Services
* Project Services
* Real Estate Development
* Real Estate & Property Management
* Real Estate & Property Administration
* Contracting & Collection Management
* Installments, Payments & Collection
* Reports
* Dashboards
* Interactive Hubs

# Document Audience & Stakeholders

The following table lists all audience of the requirements understanding workshops and the stakeholders assigned by <Customer Name> to represent and contribute to this document in accordance to their roles and responsibilities as well as the stakeholders that are involved and contributed to this engagement.

| **Name** | **Title** | **Area / Module** | **Role** | **Company** |
| --- | --- | --- | --- | --- |
|  |  | Choose an item. |  |  |
|  |  | Choose an item. |  |  |
|  |  | Choose an item. |  |  |
|  |  | Choose an item. |  |  |

Table :Stakeholders

# Requirements Sources

The sources of these business requirements are the analysis workshops that was held with <Customer Name> guided through the standards and best practices embedded within the RED365 real estate industry vertical. The content of this document is the result of the number of workshops and interviews held with the different stakeholders and key business users assigned by <Customer Name> for the specific purpose of providing <Customer Name> current business processes in conjunction with any provided documentation from <Customer Name> in relation to the business requirements, existing processes, and expected outcomes as part of this engagement.

# Related Documents

This section lists all the documents that was provided by <Customer Name> in relation to this undertaking and engagement. This document will only consider and reference documents listed within this table.

|  |  |  |
| --- | --- | --- |
| **Title**  | **Document Number** | **Revision** |
| N/A |  |  |

Table : Related Documents

# Sources of Requirements

This section describes who, what, how, and when these requirements was gathered for future reference. Describe how these requirements were gathered.

|  |  |  |  |
| --- | --- | --- | --- |
| **What** | **How** | **Who** | **When** |
| List departments & Business Units | How the sessions was conducted | Key appointed business user | The date & Time |
|  |  |  |  |

Table : Sources of Requirements

# Acronyms and Abbreviations

This section and the table below is a list of any acronyms, and appreciations that are specific to this document and may not be common knowledge.

|  |  |
| --- | --- |
| **Acronym** | **Full Name** |
| D365 Or Dynamics 365 | Microsoft Dynamics 365 |
| PSA | Project Services Automation |
|  |  |

Table : Acronyms and Abbreviations

# Definitions and Terminology

This section and the table below is a list of any definitions, terminology, and concepts that are specifically used in this document or may not be a common knowledge. This section may include diagram shapes that may be used on the document and needs to be defined to the audience of the document.

|  |  |
| --- | --- |
| **Terminology** | **Description** |
|  |  |
|  |  |
|  |  |

Table : Definitions and Terminology

# Flowchart Shapes

|  |  |  |
| --- | --- | --- |
| **Shape** | **Name** | **Description** |
|  | TerminatorStart/End | Terminators show the start and stop points in a process. When used as a Start symbol, terminators depict a trigger action that sets the process flow into motion. |
|  | Process | Show a Process or action step. This is the most common symbol in both process flowcharts and process maps. |
|  | Manual Process | Manual Operations flowchart shapes show which process steps are not automated. In data processing flowcharts, this data flow shape indicates a looping operation along with a loop limit symbol |
|  | Predefined Process /Sub-Process | A Predefined Process symbol is a marker for another process step or series of process flow steps that are formally defined elsewhere. This shape commonly depicts sub-processes (or subroutines in programming flowcharts). If the sub-process is considered "known" but not actually defined in a process procedure, work instruction, or some other process flowchart or documentation, then it is best not to use this symbol since it implies a formally defined process. |
| connector arrow | Flow Line | Flow line connectors show the direction that the process flows. |
|  | Decision | Indicates a question or branch in the process flow. Typically, a Decision flowchart shape is used when there are 2 options (Yes/No, No/No-Go, etc.) |
|  | Connector | **Flowchart:** In flowcharts, this symbol is typically small and is used as a Connector to show a jump from one point in the process flow to another. Connectors are usually labeled with capital letters (A, B, AA) to show matching jump points. They are handy for avoiding flow lines that cross other shapes and flow lines. They are also handy for jumping to and from a sub-processes defined in a separate area than the main flowchart.**Process Mapping:** In process maps, this symbol is full sized and shows an Inspection point in the process flow. |
|  | Off-page Connector | Off-Page Connector shows continuation of a process flowchart onto another page. When using them in conjunction with Connectors, it's best to differentiate the labels, e.g. use numbers for Off-Page Connectors and capital letters for Connectors. In actual practice, most flowcharts just use the Connect shape for both on-page and off-page references. Off-Page Connector shows continuation of a process flowchart onto another page. When using them in conjunction with Connectors, it's best to differentiate the labels, e.g. use numbers for Off-Page Connectors and capital letters for Connectors. In actual practice, most flowcharts just use the Connect shape for both on-page and off-page references. |
|  | Merge(Storage) | **Flowchart:** Shows the merging of multiple processes or information into one.**Process Mapping:** commonly indicates storage of raw materials. |
|  | Extract (Measurement) | **Flowchart:** Shows when a process splits into parallel paths. Also commonly indicates a Measurement, with a capital 'M' inside the symbol.**Process Mapping:** commonly indicates storage of finished goods. |
|  | Document | the Document flowchart symbol is for a process step that produces a document. |
|  | Multi-Document | Same as Document, except, well, multiple documents. This shape is not as commonly used as the Document flowchart shape, even when multiple documents are implied. |
|  | Collate | The Collate flowchart shape indicates a process step that requires organizing data, information, or materials according into a standard format or arrangement. |
|  | Sort | Indicates the sorting of data, information, materials into some pre-defined order |
|  | OR | The logical OR symbol shows when a process diverges - usually for more than 2 branches. When using this symbol, it is important to label the out-going flow lines to indicate the criteria to follow each branch. |
|  | Summing Junction | The logical Summing Junction flowchart shape is shows when multiple branches converge into a single process. The merge symbol is more common for this use, though. This symbol and the Or symbol are really more relevant in data processing flow diagrams than in process flowcharts. |

Table : Flowchart Shapes

# Overall Description

# Overview

This document describes <Customer Name> functional business requirements for the implementation of Dynamics 365 customer engagement modules and RED 365 industry vertical listed on the introduction.

This document describes the business requirements for <Customer Name> in the operations side of the business which includes all the customer interaction functions within the department(s) / subsidiaries. The areas that will be covers in the document are marketing, sales, customer care, and any other operational processes that needs to be automated as part of this engagement as part of Dynamics 365 – Customer Engagement implementation and as per the scope of the project. We understand that your business requires a broad view of the different factors to facilitate your decision making process and the maximization of the operational departments productivity. Taking into consideration the nature of the marketplace and the heterogeneous nature of the information required for decision makers to be able to manage this type of the business. The need for implementing a standard software solution that contains the best practices of the industry to simplify and help you gain business insight in real time facilitating and aiding the decision making process, while increasing the productivity and efficiency of the day to day operations. We are taking this initiative to identify and document these areas while allowing you to priorities and define your key success factors for this engagement.

The document also documents all the business processes that will be automated as part of this engagement.

# Purpose & Features

# Document Scope

# Scope

This document will describe in details the requirements for <Customer Name>, with each department, branch, and / or subsidiary of the business. The requirements will be categorized under the following functional areas:

* Contact Management
* Marketing Management
* Sales Management
* Customer Care Management
* Call Center Management
* Real Estate Development
* Real Estate & Property Management
* Brokers, Agents, Ambassador Management
* Contracting & Collection Management
* Property Delivery Management
* Facility Management
* Operations Management
* Other functional areas

Within the document we will describe the business requirements with the processes, and sub processes required for each of functional areas of your operation and the interrelation between them. Also we will describe the interdependent functionalities and processes between this system and the other areas of the business such as the Financial and banking even if that is not going to be part of the current undertaking but it will help you to have a complete picture of your needs.

Describe what’s being covered in this document, and what is not. Specifically describe context, goals and objectives for this undertaking with the critical success factor as seen by the key business users.

# Out of scope

The out of scope section of this document describes and list all the business requirements that is considered out of scope of this engagement. The table below itemize these requirements:

|  |  |
| --- | --- |
| **ID #** | **Description** |
|  |  |

Table : Out of scope

#  Open Items

The open items section of this document describes and list all the business requirements that is still not clear and may be covered in a later version of this document. The status column represents the current status of this specific item. These statuses can be one of the following:

\***Possible “**Status**”:** Open (**O**), Pending (**P**), Closed (**C**)

 The table below itemize the open issues that may be translated to business requirements:

|  |  |  |
| --- | --- | --- |
| **ID #** | **Description** | **Status** |
|  |  |  |

Table : Open Items

# Assumptions and Dependencies

The assumptions and dependencies section of this document describes and lists any assumptions that was used as a fact to build this business requirements, while the dependencies are a list of items that is required to be able to address such requirements: The table below lists these type of assumptions and dependencies:

|  |  |
| --- | --- |
| **Category** | **Assumptions** |
| Technical | * The data cleansing and verification of the intimal master data is the responsibility of <Customer Name>.
 |
| General |  |

Table : Assumptions and Dependencies

# Solution Functionality Overview

The solution functions overview Section describes and lists the guidelines and main functionality that will be governing requirements in accordance with the standard functionality and capabilities offered by Microsoft Dynamics 365 – Customer engagements and RED 365 real estate vertical.

# Solution Boundaries

The solution boundaries section lists the functionality boundaries that will be considered within the scope of this implementation. The solution for <Customer Name> will include the following:

<**Note:** This section will control the scope and needs to be completed for all the functionality of the system in the template and reduced according to the implementation scope of the project>

|  |  |
| --- | --- |
| **Functional Area** | **Functionality** |
| Organizational Area | Products & Product Families |
| Pricing, Price Lists, and discount lists |
| Units of Measure & Unit Groups |
| Fiscal Year Setting |
| Organizational Units, Departments, and sites |
| Marketing Management | Omni-channel Management |
| Microsoft Social Engagement |
| Lead Management |
| Market Segmentation (Marketing Lists) |
| Marketing Program Management |
| Campaign Management |
| Event Management |
| Customer Journey |
| Voice of the Customer (Surveys) |
| Customer Portal |
| Marketing Activities Recording & Automation* Tasks
* Email
* Appointments
* Phone calls
 |
| Marketing Dashboards & Marketing Reports |
| Marketing Goals, Targets & KPIs |
| Product literatures |
| Sales Management | Lead routing and Lead Qualifications |
| Opportunity Management |
| Sales Quotations / Proposals |
| Quotations Versioning and discounts |
| Sales orders |
| Invoicing and Payments |
| Sales Activities Recording & Automation* Tasks
* Email
* Appointments
* Phone calls
 |
| Sales Teams & Queues |
| Sales Territories |
| Sales Dashboards & Sales Reports |
| Sales Goals, Targets, KPIs |
| Sales Commission Schema |
| Contact Management | Accounts (Organizations / Companies) |
| Contacts (Individuals) / Contact Types |
| Customer 3600 View (Customer data summarization)  |
| Customer Care Management | Case / Incident Management |
| Omni-channels for case reporting |
| Service Contracts & Service Level Agreements (SLA) |
| Service Management (resources & equipment) |
| Scheduling & Service Calendar |
| Knowledge Base Management |
| Case Response automation  |
| Service Dashboards & Service Reports |
| Service Goals, Targets, KPIs |
| Real Estate Management | Banks & Bank Branches |
| Projects, Phases, Releases, and Zones |
| Products / Properties (Units, Buildings, and Lands) (Unit Inventory) |
| Other Products including* Maintenance
* Parking
* Memberships
* Etc.
 |
| Payment Plans, Payment Plans details, and Payment Types |
| Real Estate – Contracting | Property Contracts |
| Property Reallocation* Ownership Transfer
* Upgrade
* Downgrade
 |
| Installments & Payments Generation |
| Cheques entering and payments update |
| Payment Transactions (Actual Payment) |
| Updating / changing payments |
| Reports & Dashboards |
| Bulk Payment, Bulk Payments lines |
| Payment Entity |
|  |  |
|  |  |

Table : Solution Functions

# Solution Roles and Responsibilities

This section lists all the solution roles and responsibilities that covers the solution functionality and will be used to assign the right access to the solution users. The following table contains the solutions roles and the privileges assigned with it. The Role privileges may vary according to each implementation and the assigned roles and responsibilities assigned by each company.

<**Note:** This section will list all the roles of the solution in the template and to be removed according to the implementation scope of the project>

|  |
| --- |
| **Marketing Management** |
|  |
| Role | Description | Privileges |
| Marketing Coordinator | Complete tasks assigned to him, and responsible for Data Entry |  |
| Marketing Specialist | Control over the Marketing Campaign modules | Create/Read/Write on all records within the below forms:* **Marketing Segmentation**
* **Campaign**
* **Campaign Activities**
* **Campaign Response**
* **Survey**
* **Question**
* **Survey Question**
* **Survey Form**

Read Access on **Survey Response** |
| Marketing Supervisor | Same privileges as Marketing SpecialistWith the addition to the following:* Send SMS using the button “Distribute SMS Campaign Activity” within the **Campaign Activities**
* Manually add Survey URL to the Email and SMS body using the buttons “Distribute Campaign Activity” and “Distribute SMS Campaign Activity” within the **Campaign Activities**
* Convert campaign responses to leads in **‎3.4.1.4 Campaign Response** using button “Convert Campaign Response”
 |  |
| Marketing Manager | Usually in charge of a single line or brand | Coordinate the 3 above titles, solves issue with clients, planning |
| Marketing Director | Is responsible for all Marketing Managers and whether their teams are working on the right track or not. | Monitor, reports |
| Telemarketing Representatives | Deliver prepared sales talks, reading from scripts that describe products or services |  |
| System Administrator | System Administrator main responsibility is managing all features including CRM security, User profiles, Workflows, and all other needed customizations Full control on the system | Full control on the system |

Table : Solution Roles and Responsibilities - Marketing Management

|  |
| --- |
| **Sales Management** |
|  |
| Role | Description | Privileges |
| Sales Receptionist |  |  |
| Sales Admin / Assistant |  |  |
| Sales Person |  |  |
| Sales Supervisor |  |  |
| Sales Manager |  |  |
| Sales Director |  |  |
| CEO |  |  |

Table : Solution Roles and Responsibilities - Sales Management

|  |
| --- |
| **Service Management** |
|  |
| Role | Description | Privileges |
| Call Center Agent |  |  |
| Customer Service Representative |  |  |
| Customer Service Supervisor |  |  |
| Customer Service Manager |  |  |

Table : Solution Roles and Responsibilities - Service Management

|  |
| --- |
| **Real Estate – Contract Management** |
|  |
| Role | Description | Privileges |
| Contracting |  |  |
| Collection Rep |  |  |
| Collection Supervisor |  |  |
| Collection Manager |  |  |
| Accountant |  |  |
| CFO |  |  |
| Property Admin |  |  |

Table : Real Estate – Contract Management

# Solution Functional Requirements

This main section and the following sub-sections are where the actual requirements are listed and described in details with a sequence and a structure that has been guided by Dynamics 365 – Customer Engagement. Each requirement must have a unique identifier so it can be later verified and matched up with one or more design elements in the solution design and architecture document, as well as with one or more test cases. This matching process provides a mean for creating a tractability matrix that insures all requirements has been addressed and that the success criteria can be verified. In addition, indicate which requirements are critical and which are not by using the “MoSCoW Prioritization” criteria to prioritize these requirements is a well-represented way. The MoSCoW Prioritization method is defined as follow:

* **M** - ***MUST*** have this requirement as part of the project “Part of the essential success criteria”.
* **S** - ***SHOULD*** have this requirement as part of the project if at all possible within the project constraints.
* **C** - ***COULD*** have this requirement if it does not affect anything else.
* **W - *WON'T*** have this requirement this time but would like in the future – would be nice to have.

# Marketing Management

This section descripts all the marketing management functionalities as well as all the user roles that will be performing these functionalities including the use cases that will be covered within this module:

# Marketing Campaigns

# Overview

The overview section descripts the main purpose of this function. The “marketing campaign management” module is concerned with capturing and managing marketing campaigns and organizing / automating activities for <Customer Name>.

Dynamics 365 – Customer Engagement shall maintain a complete profile for each and every campaign details. Including the campaign planning activities, approval of the campaign, activities performed (actual), marketing segments (lists) that are targeted, recorded responses to the campaign. This will help <Customer Name> to gain better insight into their campaign budget details and the actuals that has been spent.

# Features

The feature section is meant to list all the business functional requirements in relation with the Marketing Campaign taking into consideration the governance that are dictated by the capabilities and abilities provided through the standard functionality.

The following table lists all the requirements of this function:

|  |  |  |
| --- | --- | --- |
| **FRID #** | **Description** | **MoSCoW** |
| MCampaign-0001 | Create and managing quick marketing campaign. | MUST |
| MCampaign-0002 | Creating and managing marketing campaigns  | MUST |
| MCampaign-0003 | Creating and Managing campaign activities | MUST |
| MCampaign-0004 | Creating Campaign activities budgeting | MUST |
| MCampaign-0005 | Executing campaign activities and adding actual cost | MUST |
| MCampaign-0006 | Creating marketing campaign templates | MUST |
| MCampaign-0007 | Using Marketing Campaign templates | MUST |
| MCampaign-0008 | Creating campaign responses | MUST |
|  |  |  |

Table : Marketing Campaign Functional Requirements

# Business Rules

The “business rules” section lists all the business rules – validations, dependencies, and restrictions applied to this module.

The table below lists these business rules

|  |  |
| --- | --- |
| **BR ID #** | **Description** |
| Campaign-BR-0001 | Email and SMS sent to the customers and leads are sent either in Arabic or English language based on the value “Arabic” or “English” of the field “Language For Communication” in the **Customer** and **Lead** forms (Forms are mentioned within section nnnn document nnnn |
| Campaign-BR-0002 | When a Value exists in field “Source Campaign” in the **Lead** Form the below fields are not mandatory to be filled:1. “ID Number or Passport Number”
2. ”ID Number or Passport Expiry Date”
3. “Interested in”
4. “Category”
5. "Address”
 |
| Campaign-BR-0003 | Any external user with access to the Survey’s URL can submit a reply to the survey that will be received by the CRM and recorded in **Survey Response** |
| Campaign-BR-0004 | For Start and End dates, user must specify an end time that happens on the same day or after the start time, and when otherwise is made the message in **‎SYS\_MSG 01** is shown to the CRM user |
| Campaign-BR-0005 | Sending email feature is only enabled through the Button “Distribute Campaign Activity” in case the value “Email” is selected from field “Channel” in **‎3.4.1.3 Campaign Activities** |

# Process Flow

The process flow section illustrates each and every single step in the process and all the conditional branches of the process in relation with the departments and the role that is performing the action



# Business Workflow Details

This section describes in details the steps and the flow that will be followed by this module:

|  |  |  |
| --- | --- | --- |
| **WF ID #** | **Step Number** | **Step Details** |
| Campaign\_WF01-001 | 001 | 1. Open Marketing Management Module
2. Select Campaigns
3. Create New Campaign
 |
|  | 001.1 | Fill in the Following Fields then press Save* Name: add a name for the Campaign
* Expected Responses (%): you should be expecting a certain amount of responses out of this campaign.
* Proposed Start and End Dates: to stay on track of the Timeline you have set for this campaign, it’s better to provide an expected start and end dates for this campaign.
* Allocated Budget: In order for the campaign to reach the Expected Responses, then you should allocate a certain budget to meet these percentages.
 |
|  | 001.2 | Fill in the Following Tabs after you have Saved* Add Marketing Campaign List/or Create New One
* Campaign Activities: if there are materials than needs to be printed, or designs that will be submitted, they must be added to the Campaign Activities.
* Leads: If the campaign has generated any leads, the user must add them so that they could be assigned to the Sales Team.

Press Save. |
|  | 001.3 |  |
| Campaign\_WF01-002 | 002 |  |

# Main Data Form

The “main data form” section descripts and list all the attributes (fields) of the marketing campaign main form with the what <Customer Name> would like to see in the form:

# Campaign Form

The following table lists all the attributes of this form:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Summary (Tab)** |
| **Name** | Single Line of Text | Yes | No |  |
| **Campaign Code** | Single Line of Text | Yes | No | System Generated on record Creation |
| **Status Details** | Single Selection | No | No | Available options are:* Proposed
* Ready to Launch
* Launched
* Completed
* Cancelled
* Suspended

Default Value is “Proposed” |
| **Estimated Revenue** | Single Line of Text  | No | No | Whole or decimal digits are only accepted |
| **Currency** | Single Selection | Yes | No | Available Options are auto-retrieved from “Currency Code” from **Currency**Default Currency Set by System Administrator for the CRM system |
| **Campaign Type** | Single Selection  | No | No | Available options are:* Online Advertisement
* Offline Advertisement
* Direct Marketing
* Event
* Co-branding
* Other

Default Value is “Blank” |
| **Offer**  | Multiple line Text | No | No |  |
| **Expected Response(%)** | Single Line of Text  | No | No | Whole Number digits from value 0 to 100 is only accepted |
| **Schedules** | Schedules | Schedules |  | Schedules |
| **Proposed Start** | Calendar | No | No | As per ‎**Campaign-BR-004** user must specify a “Proposed End” date that happens on same day or after “Proposed Start, when otherwise is made the message in **‎SYS\_MSG 01** is shown to the CRM user |
| **Proposed End** | Calendar | No | No | As per ‎**Campaign\_BR 04** user must specify a “Proposed End” date that happens on same day or after “Proposed Start, when otherwise is made the message in **‎SYS\_MSG 01** is shown to the CRM user |
| **Actual Start** | Calendar | No | No | As per **‎Campaign\_BR 04** user must specify an “Actual End” date that happens on same day or after “Actual Start”, when otherwise is made the message in **‎SYS\_MSG 01** is shown to the CRM user |
| **Actual End** | Calendar | No | No | As per **‎Campaign\_BR 04** user must specify an “Actual End” date that happens on same day or after “Actual Start”, when otherwise is made the message in **‎SYSMSG-001** is shown to the CRM user |
| **Financials (Tab)** |
| **Activity Cost** | Single Line of Text  | No | Yes | Value of the field is automatically calculated from field “Actual Cost” from**Campaign** Activitiesthatare related to the campaign  |
| **Misc. Cost** | Single Line of Text  | No | No | Whole and decimal digits are only accepted |
| **Allocated Budget** | Single Line of Text  | No | No | Whole and decimal digits are only accepted |
| **Total Cost** | Single Line of Text  | No | Yes | Value of the field is automatically calculated by the addition of “activity cost” field’s value and “misc. cost” field’s value found on this form |
| **Actual Vs Budget %** | Single Line of Text  | No | Yes | Value of the field is automatically calculated by calculating the percentage between the “Total Cost” field’s value and “Allocated Budget” field’s value |
| **Description** | Multiple line Text | No | No |  |
| **Marketing Lists** | Sub Grid | No | No | Available Options are auto-retrieved from “Name” from **Marketing Lists** |
| **Leads** | Sub Grid | No | No | Available Options are auto-retrieved from “Customer Name” from Lead Form (Form is mentioned in section 3.2.5 in Common Features RSD) |
| **Campaign Activities** | Sub Grid | No | No | Available Options are auto-retrieved from “Subject” from **Campaign Activities** |
| **Campaign Responses** | Sub Grid | No | No | Available Options are auto-retrieved from “Subject” from **Campaign Response** |
| **Administration (Tab)** |
| **Created On** | Calendar | N/A | N/A | Date and Time (System Updated) |
| **Owner** | Single Selection | N/A | N/A | Default Value: Current CRM User |
| **Modified By** | Single Selection | N/A | N/A | Default Value: Current CRM User |
| **Modified On** | Calendar | N/A | N/A | Date and Time (System Updated) |

# Related Data Forms

The “related data form” section descripts and list all the forms, and attributes (fields) related to the marketing campaign main form with the what <Customer Name> would like to see in the forms:

The following tables lists all the attributes of these forms:

# Marketing Lists Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Summary (Tab)** |
| **Name** | Single Line of Text | Yes | No | Provide a name that gives an indication for the use of this Marketing list |
| **List Type** | Option Set | Yes | No | Choose whether this marketing list is “Dynamic” in case it’s created for a generic use, or “Static” in case it’s created for a specified  |
| **Purpose** | Single Line of Text | No | No |  |
| **Targeted At** | Option Set | Yes | No |  |
| **Source** | Single Line of Text | No | No |  |
| **Currency** | Lookup | No | No |  |
| **Modified On** | Single Line of Text | No | Yes |  |
| **Cost** | Currency | No | No |  |
| **Last Used On** | Single line of Text | No | Yes |  |
| **Locked** | Option Set | No | No |  |
| **Owner** | Lookup | Yes | No |  |
| **Description** | Multiple line of Text | No | No |  |
| **Members** | Sub Grid | No | No |  |
| **Campaigns** | Sub Grid | No | No |  |
| **Quick Campaigns** | Sub Grid | No | No |  |
| **Notes** | Sub Grid | No | No |  |

# Campaign Activities Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Summary (Tab)** |
| **Subject** | Single Line of Text | Yes | No |  |
| **Used in Campaign** | Lookup | Yes | No | Available Options are auto-retrieved from “Name” from **Campaign** |
| **Type** | Option Set | No | No | Available options are:* Research
* Content Preparation
* Marketing Segmentation Creation
* Lead Qualification
* Content Distribution
* Reminder Distribution
* Direct Initial Contact
* Direct Follow-Up Contact

Default Value: “blanks” |
| **Channel** | Option Set | No | No | Available options are:* Phone
* Appointment
* Letter
* Letter via Mail Merge
* Fax
* Fax via Mail Merge
* Email
* Email via Mail Merge
* Other

Default Value: “blanks” |
| **Out Source Vendors** | Lookup | No | No | Available Option is auto-retrieved from “Customer Name” from Customer Form |
| **Description** | Multiple Line of Text | No | No |  |
| **Scheduled Start Date** | Calendar | No | No | As per campaign user must set a specified “Scheduled Start” date on which the campaign will start working. |
| **Scheduled End Date** | Calendar | No | No | As per campaign user must specify an “Scheduled End” date that happens on same day or after “Scheduled Start”. |
| **Actual Start** | Calendar | No | Yes | Contains the value entered in field “Start Date” |
| **Actual End** | Calendar | No | Yes | Contains the value entered in field “End Date” |
| **Marketing Lists** | Sub Grid | No | No | Available Options are auto-retrieved from “Name” from **Marketing Lists** |
| **Activities** | Sub Grid | No | No | It’s a sub-grid in which the user would be able to add any activity happened between him/her and the provider of the Campaign Activity |
| **Financials (Tab)** |
| **Currency** | Lookup | No | Yes | Available Options are auto-retrieved from “Currency Code” from **Currency**Default Currency Set by System Administrator for the CRM system |
| **Allocated Budget** | Currency | No | No | Only Whole or decimal digits are accepted |
| **Actual Cost** | Currency | No | No | Only Whole or decimal digits are accepted |

# Campaign Response Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Summary (Tab)** |
| **Subject** | Single Line of Text | Yes | No |  |
| **Received From (Tab)** |
| **Customer** | Lookup | No | No | Available Option is auto-retrieved from “Lead Name” from **Lead** Form or from “Customer Name” from **Customer** Form (both forms are mentioned in section 3.2.5 in Common Features RSD)The following fields will be locked and cleared in case a value is entered within Customer field:* Last Name
* First Name
* Mobile

Email |
| **Company Name** | Single Line of Text | No | No |  |
| **Last Name** | Single Line of Text | No | No |  |
| **First Name** | Single Line of Text | No | No |  |
| **Phone** | Single Line of Text | No | No |  |
| **Email** | Single Line of Text | No | No | Only Email format is accepted |
| **Details (Tab)** |
| **Promotion Code** | Single Line of Text | No | No |  |
| **Related Campaign** | Lookup | Yes | Yes | Available Options are auto-retrieved from “Name” from **Campaign** |
| **Response Code** | Option Set | No | No | Available Options are:* Interested
* Not Interested

Default Value is “Interested” |
| **Channel** | Option Set | No | No | Available Options are:* Email
* Phone
* Fax
* Letter
* Appointment
* Others

Default Value: “blanks” |
| **Outsourced Vendor** | Lookup | No | No | Available Option is auto-retrieved from “Customer Name” from Customer Form |
| **Owner** | Lookup | Yes | No | Default Value: Current CRM User |
| **Priority** | Option Set | No | No |  |
| **Received On** | Calendar | No | No |  |
| **Closed By** | Calendar | No | No |  |

# Lead Management

# Overview

The overview section descripts the main purpose of this function. The “Sales” module is concerned with creating and qualifying leads to actual opportunities.

Dynamics 365 – Customer Engagement shall maintain a complete profile for each and every Lead details. Including the Contact information, Account information, activities performed on the lead.

* + - 1. **Features**

The feature section is meant to list all the business functional requirements in relation with the Leads taking into consideration the governance that are dictated by the capabilities and abilities provided through the standard functionality.

The following table lists all the requirements of this function:

|  |  |  |
| --- | --- | --- |
| **FRID #** | **Description** | **MoSCoW** |
| SLeads-0001 | Create and managing Leads | MUST |
| SLeads-0002 | Qualifying and disqualifying Leads | MUST |

Table 16: Leads Functional Requirements

# Business Rules

The “business rules” section lists all the business rules – validations, dependencies, and restrictions applied to this module.

The table below lists these business rules

|  |  |
| --- | --- |
| **BR ID #** | **Description** |
| Leads-BR-0001 | The (Topic – Name) Fields of the lead is mandatory |
| Leads-BR-0002 | Form must be saved after those fields are filled to be able to post activities |
|  |  |
|  |  |

* + - 1. **Process Flow**

The process flow section illustrates each and every single step in the process and all the conditional branches of the process in relation with the departments and the role that is performing the action

****

* + - 1. **Business Workflow Details**

This section describes in details the steps and the flow that will be followed by this module:

|  |  |  |
| --- | --- | --- |
| **WF ID #** | **Step Number** | **Step Details** |
| Leads\_WF01-001 | 001 | Click on New Lead |
|  | 001.1 | Enter the topic |
| Leads\_WF01-002 | 002 | If it’s an existing contact , account choose them |
|  | 002.1 | Save |
| Leads\_WF01-003 | 003 | If it’s new contact enter his name and optional info |
|  | 003.1 | Save |

* + - 1. **Main Data Form**

The “main data form” section describes and list all the attributes (fields) of the Leads main form with the what <Customer Name> would like to see in the form:

# Leads Form

The following table lists all the attributes of this form:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Summary (Tab)** |
| **Topic** | Single Line of Text | Yes | No | Type a subject or descriptive name, such as the expected order, company name, or marketing source list, to identify the lead. |
| **Name** | Single Line of Text | Yes | No | Combines and shows the lead's first and last names so the full name can be displayed in views and reports. |
| **Job title** | Single Line of Text | No | No | Type the job title of the primary contact for this lead to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns. |
| **Business phone** | Single Line of Text | No | No | Type the work phone number for the primary contact for the lead. |
| **Mobile phone** | Single Line of Text | No | No | Type the mobile phone number for the primary contact for the lead. |
| **Email** | Single Line of Text | No | No | Type the primary email address for the lead. |
| **Company** | Single Line of Text  | No | No | Type the name of the company associated with the lead. This becomes the account name when the lead is qualified and converted to a customer account. |
| **Website** | Single Line of Text | No | No | Type the website URL for the company associated with this lead. |
| **Address** | Multiple Line of Text | No | No | Unique identifier for address for the company associated with this lead |
| **Details Tab** |  |  |  |  |
| **Industry** | Option Set | No | No | Select the account's primary industry for use in marketing segmentation and demographic analysis.Default OptionsValue Label1 Accounting2 Agriculture and Non-Petrol Natural Resource Extraction3 Broadcasting Printing and Publishing4 Brokers5 Building Supply Retail6 Business Services7 Consulting8 Consumer Services9 Design, Direction and Creative Management10 Distributors, Dispatchers and Processors11 Doctor's Offices and Clinics12 Durable Manufacturing13 Eating and Drinking Places14 Entertainment Retail15 Equipment Rental and Leasing16 Financial17 Food and Tobacco Processing18 Inbound Capital Intensive Processing19 Inbound Repair and Services20 Insurance21 Legal Services22 Non-Durable Merchandise Retail23 Outbound Consumer Service24 Petrochemical Extraction and Distribution25 Service Retail26 SIG Affiliations27 Social Services28 Special Outbound Trade Contractors29 Specialty Realty30 Transportation31 Utility Creation and Distribution32 Vehicle Retail33 Wholesale |
| **SIC code** | Single Line of Text | No | No | Type the Standard Industrial Classification (SIC) code that indicates the account's primary industry of business, for use in marketing segmentation and demographic analysis. |
| **Description** | Multiple Line of Text | No | No | Type additional information to describe the account, such as an excerpt from the company's website. |
| **Contact method** | Option Set  | No | No | The preferred contact method* Any
* Email
* Phone
* Fax
* Mail
 |
| **Email** | Two Options | No | No | * Allow
* Do not allow

Default Option “Allow” |
| **Bulk email** | Two Options | No | No | * Allow
* Do not allow

Default Option “Allow” |
| **Phone** | Two Options | No | no | * Allow
* Do not allow

Default Option “Allow” |
| **Fax** | Two Options | No | No | * Allow
* Do not allow

Default Option “Allow” |
| **Mail** | Two Options | No | No | * Allow
* Do not allow

Default Option “Allow” |

# Marketing Segmentation (Marketing List)

You can define your various target groups by setting up segments and lists. Each list or segment represents a collection of contacts that you can use to target a customer journey.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Name** | Single Line of Text | Yes | No |  |
| **List Type** | Single Selection | Yes | No | Available Options Are:* Static
* Dynamic

Default Value “Static” |
| **Purpose** | Single Line of Text | No | No |  |
| **Targeted At** | Single Selection | Yes | No | Available Options Are:* Account
* Customer
* Lead

Default Value “Blanks” |
| **Source** | Single Line of Text | No | No |  |
| **Currency** | Lookup | No | No | Available Options are auto-retrieved from “Currency Code” from **Currency**Default Currency predefined by System Administrator  |
| **Modified On** | Date and Time | No | Yes |  |
| **Cost** | Single Line of Text | No | No | Only whole or decimal digits are accepted |
| **Last Used On** | Date and Time | No | Yes | Dates automatically updated based on the last date the marketing segmentation record has been added to in sub-grid “Marketing Segmentation” |
| **Locked** | Single Selection | No | No | Available Options Are:* Yes
* No

Default Value “No” |
| **Owner** | Single Selection | N/A | N/A | Default Value: Current CRM User |
| **Description** | Multiple Lines of Text | No | No |  |
| **Members** | Sub grid | No | No | Available Options are auto-retrieved based on the value selected from “Targeted At”:* In case the value selected is “Account”, then available options are shown from “Account Name” from **Account** Form
* In case the value selected is “Lead”, then available options are shown from “Lead Name” from **Lead** Form
* In Case the value selected is “Customer” then available options are shown form “Customer Name” from **Customer** Form
 |
| **Campaign** | Sub grid | No | No | Available Options are auto-retrieved from “Name” from **Campaign** |

# Marketing Program Management

# Overview

The business case for the marketing program is to give the marketing department the ability to create one program that contains multiple campaigns and track the program marketing mix while tracking the progress of the program from proposed till execution.

# Process Flow

The process flow section illustrates each and every single step in the process and all the conditional branches of the process in relation with the departments and the role that is performing the action

# Business Workflow Details

This section describes in details the steps and the flow that will be followed by this module:

|  |  |  |
| --- | --- | --- |
| **WF ID #** | **Step Number** | **Step Details** |
| MP\_WF01-001 | 001 | Click on New |
|  | 001.1 | Enter Marketing Program Name |
|  | 001.2 | Press Save |
|  | 001.3 | Add Program Campaigns from the Sub-grid |
|  | 001.4 | If it’s a new Campaign, then create New Program Campaign. |
|  | 001.5 | Add Targeted Segments |
|  | 001.6 | If there is an existing Segment choose it, if not create new. |
| MP\_WF01-002 | 002 | If Marketing Program exist, open it |
|  | 002.1 | Add Program Campaign to existing Campaigns |
|  | 002.2 | If needed to add to new Targeted Segment |

# Main Data Forms

The “main data form” section describes and list all the attributes (fields) of the Marketing Program main form with the what <Customer Name> would like to see in the form:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **General Information (Tab)** |
| **Marketing Program Code** | Single line of text | Yes | Yes | Automatic generated number by the system |
| **Marketing Program Reference** | Single line of text | No | No | Used by the customer to reference external system |
| **Marketing Program Name**  | Single line of text | Yes | No |  |
| **Description** | Multi line of text | No | No | Used to describe the program  |
| **Program Objective** | Multi line of text | No | No | Describe the objective of the program |
| **Number of Campaigns** | Whole number | Yes | Yes | Rollup field that counts the number of campaigns |
| **Program Status** | Option set | No | No | The option set will be moved automatically from a status to another according where the program is:* Planning
* Proposed
* Rejected
* Ready to Launch (After the program has been approved and until the program starts – actual start date)
* In Progress (the program will continue as in progress (Launched) until the actual completion date
* Completed
* Canceled
* Suspended

Default value is “Planning” |
| **Product Information (Tab)** |
| **Marketing Program Planning Start Date** | Date time (date only) | Yes | Yes | Automatic generated by the system when a new program is created |
| **Marketing Program Planning Completion Date** | Date time (date only) | Yes | Yes | Automatic generated by the system when the program is moved from planning to  proposed |
| **Marketing Program Planned Launch Date** | Date time (date only) | No | No | User provided |
| **Marketing Program Planned Completion date** | Date time (date only) | No | No | User provided |
| **Marketing Program Actual Launch Date** | Date time (date only) | No | No | User provided |
| **Marketing Program Actual Completion Date** | Date time (date only) | No | No | User provided |
| **Marketing Program Suspension Date** | Date time (date only) | Yes | Yes | Automatic generated by the system when the program is suspended using suspend button |
| **Marketing Program Resume Date** | Date time (date only) | Yes | Yes | Automatic generated by the system when the program is resumed using resume button |
| **Submitted for Approval Date** | Date time (date only) | Yes | Yes | After completing al the  |
| **Approved / Reject Date** |  |  |  |  |
| **Program Campaigns (Tab)** |
| Program Campaigns is a sub grid of the Program campaigns dependent on the relation with the campaign (1 program may have multiple campaigns |
| **Program Mix (Tab)** |
| Program Campaigns is a sub grid (graph only) of the Program campaigns with a special view that allow to create a chart showing the marketing mix the forms the program represents |
| **Program Performance (Tab)** |
| * Contains a graph showing the number of leads generated by campaign type related to the program
* A graph showing the conversion rate (closed as won leads –total amount of closed opportunities – contracts – divided by the number of leads generated per campaign type
 |
| **Projects (Tab)** |
| * Contains all projects related to these campaigns
 |
| **Phases (Tab)** |
| * Contains all phases related to these campaigns
 |
| **Target Segments (Tab)** |
|  |

# Event Management

# Surveys Management

# Process Flow

The process flow section illustrates each and every single step in the process and all the conditional branches of the process in relation with the departments and the role that is performing the action



# Business Workflow Details

This section describes in details the steps and the flow that will be followed by this module:

|  |  |  |
| --- | --- | --- |
| **WF ID #** | **Step Number** | **Step Details** |
| Survey Management\_WF01-001 | 001 | Marketing Supervisor either use existing survey in **Survey** or first create the questions and survey details using the **Survey, Questions** and **Survey Questions** forms to create the required details to needed survey form |
|  | 001.1 | Marketing Supervisor decides to either to distribute the Survey URL to Marketing segmentation members through Email and SMS or to fill the survey form directly from CRM on the contact’s behalf |
|  | 001.2 | **Marketing Supervisor user manually distribute the Survey** add that URL from the field “URL” in **Survey** to the Email and SMS body using the buttons “Distribute Campaign Activity” and “Distribute SMS Campaign Activity” within the **Campaign Activities** |
|  | 001.3 | **Marketing Supervisor user fills the survey details** **on CRM** with the contact’s reply in **Survey Form** |
|  | 001.4 | Marketing Segmentations Members receives Email and SMS notifications mentioned in **Survey** |
|  | 001.5 | The external user uses the URL to access the survey portal page and submits the entered details using the button “Submit Survey” in Portal Survey |
|  | 001.6 | On survey submission, values are transferred automatically by the system from the Portal Survey Page to CRM Form Survey Form |
|  | 001.7 | For each response submitted by the external user on a specific question or submitted directly in Survey Form by CRM users, a single record will be created for the Survey Response and process ends |

# Marketing Activities Recording & Automation

# Overview

The marketing activities recording depicts all activities like “Tasks, Emails, Appointments, and Phone Calls” that has been made for a certain campaign or an event.

The Activities Automation

# Process Flow

The process flow section illustrates each and every single step in the process and all the conditional branches of the process in relation with the departments and the role that is performing the action

# Business Workflow Details

This section describes in details the steps and the flow that will be followed by this module:

|  |  |  |
| --- | --- | --- |
| **WF ID #** | **Step Number** | **Step Details** |
| Marketing Activity\_WF01-001 | 001 |  |
|  | 001.1 |  |

# Marketing Dashboard and Reports

# Overview

Dashboards and reports give you an understanding of where your business stands. The Practice Management dashboard gives you an all-up view of your costs, gross margin, and role utilization. You can also track your sales numbers with the Sales Activity Social dashboard.

# Dashboards

There are two types of dashboards in Dynamics 365—user dashboards and system dashboards. Any user can create a dashboard visible only to them in their work area, such as Sales, Service, or Marketing. An administrator or customizer creates or customizes system dashboards that, when published, are visible to everyone in the organization.

# Features

The feature section is meant to list all the business functional requirements in relation with the Marketing Campaign taking into consideration the governance that are dictated by the capabilities and abilities provided through the standard functionality.

The following table lists all the requirements of this function:

|  |  |  |
| --- | --- | --- |
| **FRID #** | **Description** | **MoSCoW** |
| Dashboard-0001 | Set properties for a chart or list included in a dashboard | COULD |
| Dashboard-0002 | Manage dashboard components | COULD |

# Marketing Goals, Targets, & KPIs

# Overview

#  Sales Literature

# Overview

Sales literature in Dynamics 365 for Sales stores sales-related information such as brochures or detailed specifications of products. Think of sales literature as a central repository for your organization’s sales information that lets you share information with other users.

# Main Data Form

The “main data form” section descripts and list all the attributes (fields) of the Sales Literature main form.

The following table lists all the attributes of this form:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Information (Tab)** |
| **Title** | Single Line of Text | Yes | No | Create a title for the Sales Literature that is being created |
| **Subject** | Multi Option Set | Yes | No | Default Option Set* Complaints
* Default Subject
* Financial Cases
* Query
* Information
* Products
* Re-Sailing Cases
* Services
* Delivery
* Maintenance
 |
| **Type** | Option Set | No | No | Default Option Set* Presentation
* Product Sheet
* Policies and Procedures
* Sales Literature
* Spreadsheets
* News
* Bulletins
* Price Sheets
* Manuals
* Company Background
* Marketing Collateral
 |
| **Description** | Multiple line of Text | No | No |  |
| **Sales Attachments (Sub-grid)** |
| After saving the above details regarding in the information tab, you will be able to attach the documents from the Sales Attachment tab. |
| **Products (Sub-grid)** |
| You could add separate products from this tab, it’s a lookup from existing products. |
| **Competitors (Sub-grid)** |
| You could add the competitors for this Sales Literature, it lookup for existing Competitors accounts. |

#  Marketing User Roles

This section lists all the user roles that will be available in this function and the cases that they will be performing on the system:

| **Role** |  **Use Cases** |
| --- | --- |
| Marketing Specialist | * Create Campaign
* Create Marketing Lists
 |
| Marketing Supervisor |  |
| Marketing Manager |  |
| Marketing Director |  |
| Telemarketing Representatives |  |
| System Administrator |  |

#  Marketing User Stories

This section lists all the user stories < are short, simple descriptions of a feature told from the perspective of the person who desires the new capability or usage of existing capability, usually a user or customer of the system>

The User story should be in the following format

As a < User Role >, I want < some goal > so that < some reason > when <Condition>.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **User Story ID** | **User Role(Who)** | **Story Goal(What)** | **Story Reason(Why)** | **Story Condition (When)** |
|  | Marketing Specialist | Create Campaign | Generate Leads | Launching of a new product |
|  | Marketing Specialist | Create Marketing Lists | To be able to target the needed Category  | Before creating a campaign |
|  | Marketing Supervisor |  |  |  |
|  | Marketing Manager |  |  |  |
|  | Marketing Director |  |  |  |
|  | Telemarketing Representatives |  |  |  |
|  | System Administrator |  |  |  |

#  Marketing Use Cases

This section lists all the use cases in relation to the Marketing Management

# Use case UC-MM-00001 <Create a Static Marketing List>

This section describes in details where, how, and when the use case will be used. Explain who will be directly performing this use case, for example, it may be intended to be used by “Marketing Specialist” to perform a specific function. Also, if the case has a user interface component related to it or a usability and user experience part, then describe a typical sequence of actions performed by the end-user. If necessary, add user scenarios to clarify the different usages of this case.

|  |  |
| --- | --- |
| **Use Case Name** | Creating Static Marketing List |
| **Use case ID** | UC-00001-0001 |
| **Actors** | Marketing Specialist |
| **Description** | Static segments establish a static list of contacts who are selected on a per-contact basis rather than created logically based on field values. Marketers and salespeople might create and populate a static list based on private knowledge or offline interactions. |
| **Pre-conditions** | Creating Contacts with the specified and predetermined features. |
| **Post conditions** | N/A |
| **Normal Flow** | 1. User opens Marketing List
2. Press New
3. Create Marketing list with Static Type
4. Press Save
5. Add the needed Accounts, Contacts, or Leads.
 |
| **Alternative Flow** | N/A |
|  |  |
| **Exceptions** | N/A |
| **Notes** |  |

# Use case UC-MM-00001 <Create a Dynamic Marketing List>

|  |  |
| --- | --- |
| **Use Case Name** | Create a Dynamic Marketing List |
| **Use case ID** | UC-00001-0001 |
| **Actors** | Marketing Specialist  |
| **Description** | is where membership to that list is defined by an advanced find associated with the marketing list. Whenever a new record is created or updated and meets the criteria of the marketing list query, it will automatically be added to the marketing list. |
| **Pre-conditions** | Create any type of Accounts, Contacts, or Leads |
| **Post conditions** | N/A |
| **Normal Flow** | 1. User opens Marketing List
2. Press New
3. Create Marketing list with Dynamic Type
4. Press Save
5. Add the needed Accounts, Contacts, or Leads.
 |
| **Alternative Flow** | N/A |
|  |  |
| **Exceptions** | N/A |
| **Notes** |  |

#  Contracting & Collection Management

# Overview

# Features

The feature section is meant to list all the business functional requirements in relation with the Marketing Campaign taking into consideration the governance that are dictated by the capabilities and abilities provided through the standard functionality.

The following table lists all the requirements of this function:

|  |  |  |
| --- | --- | --- |
| **FRID #** | **Description** | **MoSCoW** |
|  |  |  |
|  |  |  |

# Business Rules

The “business rules” section lists all the business rules – validations, dependencies, and restrictions applied to this module.

The table below lists these business rules

|  |  |
| --- | --- |
| **BR ID #** | **Description** |
|  |  |
|  |  |

# Process Flow

The process flow section illustrates each and every single step in the process and all the conditional branches of the process in relation with the departments and the role that is performing the action

# Main Data Forms

The “main data form” section descripts and list all the attributes (fields) of the Contracting & Collection main form with the what <Customer Name> would like to see in the form:

# Expression of Interest Form

The following table lists all the attributes of this form:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **General Information (Tab)** |
| **EOI Number** | Single line of Text | Yes | Yes |  |
| **Project** | Lookup | No | No |  |
| **Phase** | Lookup | No | No |  |
| **Amount** | Single line of Text | Yes | No |  |
| **Customer** | Lookup | Yes | No |  |
| **Payment Type** | Option Set | No | No |  |
| **Payment Method** | Option Set | No | No |  |
| **Cheque Number** | Single Line of Text | No | No |  |
| **Cheque Date** | Date & Time | No | No |  |
| **Client’s Bank** | Lookup | No | No |  |
| **Client’s Bank Branch** | Lookup | No | No |  |
| **Developer’s Bank** | Lookup | No | No |  |
| **Developer’s Bank Branch** | Lookup | No | No |  |
| **Unit Information (Tab)** |
| **Requested Areas** | Single Line of Text | No | No |  |
| **Number of Units** | Whole Number | No | No |  |
| **Internal Information (Tab)** |
| **Sales Representative** | Lookup | No | No |  |
| **Manager** | Lookup | No | No |  |
| **Broker’s Name** | Lookup | No | No |  |
| **Date** | Date & Time | No | No |  |

# Reservation & Contracting Form

The reservation and contracting form is divided into several phases. Through each phase a certain tab expands and another collapse according to the need of this tab. The table below will be divided according to these phases and the tabs expanded through each phase.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| English Field | Type | Mandatory | Read Only | Description |
| **Reservation Phase** |
| **Summary (Tab)** |
| **Customer** | Lookup | Yes | No |  |
| **Unit** | Lookup | Yes | No |  |
| **Payment Term** | Lookup | Yes | No |  |
| **Client’s Bank** | Lookup | Yes | No |  |
| **Client’s Bank Branch** | Lookup | Yes | No |  |
| **Stage** | Option Set | No | No |  |
| **Reservation Payment** | Lookup | No | No | It’s lookup over the Bulk Payment entity, after the reservation fees has been paid. |
| **Product Information (Tab)** |
| **Unit** | Lookup | Yes | Yes |  |
| **Payment Plan** | Lookup | Yes | Yes |  |
| **Project** | Lookup | No | No |  |
| **Phase** | Lookup | No | No |  |
| **Unit Release** | Lookup | No | No |  |
| **Contract Information (Tab)** |
| **Contract ID** | Single Line of Text | Yes | Yes |  |
| **Contract Number** | Single Line of Text | Yes | Yes |  |
| **Developer’s Bank** | Lookup | No | No |  |
| **Developers Bank Branch** | Lookup | No | No |  |
| **Currency** | Lookup | Yes | Yes |  |
| **Price List** | Lookup | Yes | Yes |  |
| **Price Locked** | Two Options | Yes | Yes |  |
| **Sales Representative Information (Tab)**  |
| **Sales** | Lookup | No | No |  |
| **Sales Admin** | Lookup | No | No |  |
| **Origination Lead Type** | Lookup | No | No |  |
| **Broker** | Lookup | No | No |  |
| **Accountant** | Lookup | No | No |  |
| **Sales Manager** | Lookup | No | No |  |
| **Agent** | Lookup | No | No |  |
| **Details Sub-grid** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# System Messages

This section will list all the messages that will be used to guide the users when an entry is incorrect. The table below lists all these messages:

|  |  |
| --- | --- |
| **MSG ID #** | **Description** |
| SYSMSG-001 | “Message” |
|  |  |
|  |  |
|  |  |

##

#

# Communications interfaces

Specify any communication interfaces such as network protocols etc.

The assumption that all the systems will be residing on the same network and will be communicating through TCP/IP protocol with no need for specific communication protocols for any of the systems.

# Integration Requirements

If applicable describe any security requirements

# Security Requirements

If applicable describe any security requirements

# Regulatory Requirements

If there are any requirements having to do with regulatory issues, then put them here.

# Testing Requirements

List and describe all the requirements having to do with testing functional requirements.

# Types of Future Modifications Foreseen

If there are any plans to modify or enhance the component in the future by adding, removing, or modifying requirements, then state that here. You may put N/A here, if nothing is obvious, i.e. only include known items and don’t look for future solutions!

# Appendices

# Appendix I:

# Revision History

This section includes a comprehensive summary of all changes made to the document since the last approved version.

|  |  |
| --- | --- |
| **File Name** | Functional.Requirements.Document.Template.V0.2.docx |
| **Original Author(s)** | Ashraf Badawi |
| **Current Revision Author(s)** | Ashraf Badawi |

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision** | **Date** | **Author** | **Changes** |
| <Y.x> | 9/16/2018 | Ashraf Badawi | Initial Version |
|  |  |  |  |

# Document Sign-off Information