Software Requirement Specifications

**For SIGNET POWER**

**A close-up of a logo**

http://www.cccinfotech.com/images/logo.png

Date: 15th February 2024

Cloudcentric Infotech Pvt. Ltd.

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Contents

[Revision History 3](#_Toc158908937)

[Purpose 3](#_Toc158908938)

[Current State of the Business 3](#_Toc158908939)

[Challenges: 3](#_Toc158908940)

[Focus On: 4](#_Toc158908941)

[Future State of the Business 4](#_Toc158908942)

[Tools and Technology 4](#_Toc158908943)

[Definitions, Acronyms, and Abbreviations 4](#_Toc158908944)

[Functional Requirement 4](#_Toc158908945)

[Organizational Structure 5](#_Toc158908946)

[Flow Chart 6](#_Toc158908947)

[Out of scope 6](#_Toc158908948)

[Scope Creep 6](#_Toc158908949)

[Modular Breakdown Structure 7](#_Toc158908950)

[This SRS has been created in modular structure as follows. 7](#_Toc158908951)

[System Use Cases 8](#_Toc158908952)

[User, Profile, Role Management 9](#_Toc158908953)

[Manual Lead Creation 9](#_Toc158908954)

[Web to Lead Capture 11](#_Toc158908955)

[Lead Conversion 12](#_Toc158908956)

[Account Management 13](#_Toc158908957)

[Contact Management 14](#_Toc158908958)

[Opportunity Management 15](#_Toc158908959)

[Manage Product 16](#_Toc158908960)

[Create Opportunity Line Item 17](#_Toc158908961)

[Manage Quote 18](#_Toc158908962)

[Manage Quote Line Item 19](#_Toc158908963)

[Create Case 21](#_Toc158908964)

[Manage Activities 22](#_Toc158908965)

[Reports and Dashboard 23](#_Toc158908966)

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# Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version #** | **Date** | **Author** | **Changes** |
| 1.0 | 15th February 2024 | Ashu Tyagi , Ashutosh Khagwal | N/A |

# Purpose

The Software Requirement Specification (SRS) focuses on the Business Perspective as it contains details of the Business Solution for the Project. It captures functional Requirement for

* Salesforce Implementation, CRM and Digital Platform for Customer, System Administrator,

# Current State of the Business

SIGNET POWER Signet Power very much appreciates your trust and patronage that you have been giving us since long.

Signet Power prides itself as one of the leaders in giving the best technological product to the customer, which are known for their world class quality, offering the complete range of Rittal and giving total solution for Electrical, Electronics, Process control Networking & telecommunication applications.

We have the wide and complete range; most of them ready stock thus giving you prompt delivery and hope that you will be able to meet your requirement as well as requirement of your customer even better.

# Challenges:

* Maintain the Prospect/Customer data.
* Complex Sales process.
* Data is available on multiple platforms.
* Follow-up based on dates.

# Focus On:

* Avoid duplicate data in the system and keep the data consistency.
* Manage Prospect/Customer Data.
* Reduce the complexity of the sales process.
* Keeping the entire conversation history between the customer & Sales Team.

# Future State of the Business

Signet Power will be using Salesforce in their day-to-day activities.

# Tools and Technology

* Salesforce CRM –Signet Power using Salesforce CRM with Salesforce platform licenses.

# Definitions, Acronyms, and Abbreviations

|  |  |
| --- | --- |
| **Acronyms** | **Description** |
| SFDC | Salesforce.com |
| CRM | Customer Relationship Management |
| UAT | User Acceptance Testing |
| SRS | Software Requirement Specification |
| SOW | Statement Of Work |
| Docs | Document |
| Approx | Approximately |

# 

# Functional Requirement

The functional requirement captured into the use cases listed in this document. Integration module discussion is still pending. Integration module will be added after discussion.

# 

# Organizational Structure

Signet Power Organizational Structure –

A diagram of a company

Description automatically generated

# 

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# Flow Chart

* This is the sales flow chart which will be followed for further developments.

A diagram of a company

Description automatically generated

# Out of scope

* Any point which is not part of this SRS & signed SOW is out of scope.

# 

# Scope Creep

* Ashoka proposal pdf creation.

# Modular Breakdown Structure

# This SRS has been created in modular structure as follows.

|  |  |
| --- | --- |
| **Module** | **Use Cases** |
| User Management | UC-001 |
| Lead Management | UC-002, UC-003, UC-004 |
| Account Management | UC-005 |
| Contact Management | UC-006 |
| Opportunity Management | UC-007, UC-009 |
| Product Management | UC-008 |
| Quote Management | UC-010, UC-011 |
| Case Management | UC-012 |
| Activity Management | UC-013 |
| Reports & Dashboard | UC-014 |

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# System Use Cases

|  |  |
| --- | --- |
| **Use Case** | **Use Case Name** |
| **UC-001** | User, Profile, Role Management |
| **UC-002** | Lead Management |
| **UC-003** | Web to Lead, Insta Pages |
| **UC-004** | Lead Conversion |
| **UC-005** | Account Management |
| **UC-006** | Contact Management |
| **UC-007** | Opportunity Management |
| **UC-008** | Product Management |
| **UC-009** | Opportunity Line item |
| **UC-010** | Quote Management |
| **UC-011** | Quote line item |
| **UC-012** | Case Management |
| **UC-013** | Activity Management |
| **UC-014** | Reports and Dashboard |

# User, Profile, Role Management

|  |  |
| --- | --- |
| **Use Case ID** | **UC-001** |
| **Use Case Name** | User, Profile, Role Management |
| **Actors** | System Administrator |
| **Description** | Actors should be able to add users and assign them to a role. |
| **Assumption** | Users would be configured for all the Salesforce license holders of Signet Power |
| **Pre-Condition** | The data model is ready to setup the access permissions |
| **Post-Condition** | User should have managed user permission |
| **Normal Flow** | The Actor will click on setup and then in a quick find box, Admin will search for Users then click the new user and the form will appear where the user needs to fill in the following information to set up a new user record.   * First Name * Middle Name * Last Name\* * Username * Email ID\* * Mobile * Designation * User License * Profile * Active - Checkbox |
| **Notifications** | New user will receive an email with a reset password link. |
| **Validations** | Username will be unique. |
| **Alternate Flow** | N/A |
| **References** | N/A |

# 

# Manual Lead Creation

|  |  |
| --- | --- |
| **Use Case ID** | **UC-002** |
| **Use Case Name** | Manual Lead Creation |
| **Actors** | System Administrator, General Manager, GM(Faridabad), Marketing Head. |
| **Description** | Actors will create Enquiry to manage lead. |
| **Assumption** | N/A |
| **Pre-Condition** | CRM users log into the CRM Application and have the option to create lead Information manually. |
| **Post-Condition** | The Lead detail information will be created and saved into the CRM. |
| **Normal Flow** | * User click the tab called “Lead”. * User click the button called “New”. * Users will be presented to create Prospect with following fields: * Company Name\* * First name/name of owner/MD * Last Name\* * Title * Nature Of Business * Email \* * Phone * Mobile * Rating * Website * Name of person Releasing order/Payment * Email * Phone * Mobile * TIN/CST, GST * PAN * Proposed payment term * Upper maximum limit * Name and address of sister company, if any – long text area * Address   + Street   + City   + State   + Country   + Pin Code * Customer/Lead Source * Tender * Web to lead * Exhibition * Seminar * Other * Lead source name – a text field will be given when lead source is any of the above. * Lead Status   + Open/New   + Working- Contacted   + Qualified/ Converted   + Not Qualified * Lost reason * Qualify reason * Description   The field marked with \* are required.  Note: -   * Lead Management * New lead will be created into the CRM on lead object. Lead qualification will be decided by user, it means user knows after talking with customer that it needs to be converted into account, contact, opportunity. * For Existing customer its account is already created and under it opportunity will be created. * Lead Notification * Notification will be sent to senior person when new lead is created for area wise Marketing user. * Activity in salesforce on lead * Meeting notes will be created will be created from log a call functionality. Once Meeting comment is written, user should not be able to edit the comments. New comment comes that user will create new log a call activity. * Lead Assignment * Assignment of lead will be done manually. |
| **Notifications** | N/A |
| **Validations** | 1. The system will not allow duplicate lead with Mobile and Email. |
| **Alternate Flow** | N/A |
| **References** | N/A |

# Web to Lead Capture

|  |  |
| --- | --- |
| **Use Case ID** | **UC-003** |
| **Use Case Name** | Web to lead capture. |
| **Actors** | System Administrator |
| **Description** | Lead will be fetched from company website into the CRM. |
| **Assumption** | N/A |
| **Pre-Condition** | Website must have capability to either Integrate the Web to Lead form or should be able to make API calls to Salesforce CRM. |
| **Post-Condition** | Lead automation will be done using Web to Lead form or API Calls. |
| **Normal Flow** | * Lead will be created automatically into the CRM once customer enters the required details in Web to lead form. * All the fields Information on website will be captured via Web to Lead. * Web to lead fields are as follows: -   + First Name   + Last Name   + Mobile   + Email |
| **Notifications** | N/A |
| **Validations** | N/A |
| **Alternate Flow** | N/A |
| **References** | N/A |

# Lead Conversion

|  |  |  |
| --- | --- | --- |
| **Use Case ID** | **UC-004** | |
| **Use Case Name** | Lead Conversion | |
| **Actors** | System Administrator, General Manager, GM(Faridabad), Marketing Head. | |
| **Description** | Once lead met the certain criteria will be converted into Account , Contact and Opportunity. | |
| **Assumption** | Lead can be created manually or via web to lead. | |
| **Pre-Condition** | User has the access to create and modify the leads | |
| **Post-Condition** | Lead will be converted into Account and Opportunity for further process. | |
| **Normal Flow** | 1. Once records are created into the CRM. It has to go through certain stages to be qualified for Account and Opportunity. These stages are:    * Open/New    * Working- Contacted    * Qualified/ Converted    * Not Qualified 2. After the completion of one stage lead will move to the next stage and after completion of all the stages, Lead will be converted into Account, Contact and Opportunity and will be further processed.  |  |  |  |  | | --- | --- | --- | --- | | Lead | Account | Contact | Opportunity | | First Name | First Name | First Name | N/A | | Last Name | Last Name | Last Name | N/A | | Salutation | N/A | N/A | N/A | | Company | Company name | N/A | Opportunity Name | | Title | Title | Title | N/A | | Phone | Phone | N/A | N/A | | Mobile | N/A | Mobile | N/A | | Email | Email | Email | N/A | | Website | Website | N/A | N/A | | Name of person Releasing order/Payment | Name of person Releasing order/Payment | N/A | Name of person Releasing order/Payment | | Proposed payment term | Proposed payment term | N/A | Proposed payment term | | Upper maximum limit | Upper maximum limit | N/A | Upper maximum limit | | GST | GST | N/A | PAN | | PAN | PAN | N/A | N/A | | Lead Status | N/A | N/A | N/A | | Rating | Rating | N/A | N/A | | Lead Source | N/A | N/A | N/A | | Status | N/A | N/A | N/A | | Qualified Reason | N/A | N/A | N/A | | Unqualified Reason | N/A | N/A | N/A | | Street | Billing Street | Mailing Street | N/A | | City | Billing City | Mailing City | N/A | | State | Billing State | Mailing State | N/A | | Country | Billing Country | Mailing Country | N/A | | PIN/ZIP | Billing PIN/ZIP | Mailing PIN/ZIP | N/A | | Description | N/A | N/A | N/A | |
| **Notifications** | N/A |
| **Validations** | N/A |
| **Alternate Flow** | N/A |
| **References** | N/A |

# Account Management

|  |  |
| --- | --- |
| **Use Case ID** | **UC-005** |
| **Use Case Name** | Account Management |
| **Actors** | System Administrator, General Manager, GM(Faridabad), Marketing Head. |
| **Description** | Actor will be creating Accounts into the system |
| **Assumption** | N/A |
| **Pre-Condition** | Actor should have permission to create new account |
| **Post-Condition** | New account will be created successfully |
| **Normal Flow** | * User click the tab called “Account” * User click the button called “New” * Users will be presented to create Account with following fields. All the standard fields will be used. * Account Name * PAN * TIN/CST, GST * Upper maximum limit Proposed payment term. * Billing Address   + Billing Street   + Billing City   + Billing State/Province   + Billing Zip/Postal Code   + Billing Country * Shipping Address   + Shipping Street   + Shipping City   + Shipping State/Province   + Shipping Zip/Postal Code   + Shipping Country * Phone * Website * Description * Copy billing address to shipping address - checkbox |
| **Notifications** | N/A |
| **Validations** | A checkbox to copy billing address to shipping address. |
| **Alternate Flow** | N/A |
| **References** | N/A |

# 

# Contact Management

|  |  |
| --- | --- |
| **Use Case ID** | **UC-006** |
| **Use Case Name** | Contact Management |
| **Actors** | System Administrator, General Manager, GM(Faridabad), Marketing Head. |
| **Description** | Actor will be creating Contact into the system |
| **Assumption** | N/A |
| **Pre-Condition** | Actor should have permission to create new Contact |
| **Post-Condition** | New contact will be created successfully |
| **Normal Flow** | * User click the tab called “Contact” * User click the button called “New” * Users will be presented to create Contact with following fields. All the standard fields will be used.   + First name   + Last name   + Title   + Account Name   + Business Phone   + Designation   + Mailing State   + Mailing Street   + Mailing City   + Mailing Zip Code   + Mailing Country   + Mobile   + Email   + Department   + Description-Long text area   + Other State/Province   + Other Zip/Postal Code   + Other Phone   + Other Country   + Other City   + Other Address |
| **Notifications** | N/A |
| **Validations** | N/A |
| **Alternate Flow** | N/A |
| **References** | N/A |

# 

# Opportunity Management

|  |  |
| --- | --- |
| **Use Case ID** | **UC-007** |
| **Use Case Name** | Opportunity Management |
| **Actors** | System Administrator, General Manager, GM(Faridabad), Marketing Head. |
| **Description** | Actor will be creating Opportunity into the system |
| **Assumption** | Opportunity can be created once lead is converted. |
| **Pre-Condition** | Actor should have permission to create new opportunity |
| **Post-Condition** | New opportunity will be created successfully |
| **Normal Flow** | 1. User click the tab called “Opportunity” 2. User click the button called “New”  * Name * Account Name * Total Amount * Close Date * Description * Proposed payment term * Upper maximum limit * Owner name * Stage * Opportunity For   + Signet Power   + Indra Electricals Control   Note -   * Opportunity will be created when lead is converted. On opportunity user will have the functionality to add products. * On opportunity Proposal stage, user can create quote and send it to customer. |
| **Notifications** | N/A |
| **Validations** | N/A |
| **Alternate Flow** | N/A |
| **References** | N/A |

# Manage Product

|  |  |  |
| --- | --- | --- |
| Use Case ID | | UC-008 |
| Use Case Name | Create Product |
| Actors | System administrator, User. |
| Description | Product will be added under opportunity. |
| Assumption | Product is present in the system. |
| Pre-Condition | Opportunity already exists in the system. |
| Post-Condition | Opportunity Line Item record has been created into the CRM. |
| Normal Flow | * Product Name / Article * Product Code /HSN Code * Make * Discount * GST * Active * Unit Price * Product Category * Description/Specification * Validity date |
| Notifications | N/A |
| Validations | N/A |
| Alternate Flow | N/A |
| References | N/A |

# 

# Create Opportunity Line Item

|  |  |
| --- | --- |
| Use Case ID | UC-009 |
| Use Case Name | Create Opportunity Line Item |
| Actors | System administrator, User. |
| Description | Opportunity Line Item will be created after product in added on opportunity. |
| Assumption | Account already exist in the system and related opportunity |
| Pre-Condition | Opportunity exists in the system. |
| Post-Condition | Opportunity Line Item record has been created into the CRM. |
| Normal Flow | 1. User will be able to add line item going into the related section of Opportunity. 2. User can Add products by clicking on the button “Add Products”.    * Opportunity Line item Name    * Opportunity    * Product Name    * Product Code /HSN Code    * Make    * Discount %    * GST    * Quantity    * Unit price (Original price of product)    * Net unit price (Discounted amount)    * Total (Net unit price \*qty)    * Packaging and forwarding - percent.    * GST (Tax) – product wise – 12%,18%,28%    * Grand Total (Including GST)    * Lead Time – text    * Description 3. Discount will come product wise. It will be percentage. |
| Notifications | N/A |
| Validations | N/A |
| Alternate Flow | N/A |
| References | N/A |

# Manage Quote

|  |  |
| --- | --- |
| Use Case ID | UC-010 |
| Use Case Name | Create Quote |
| Actors | System administrator, User |
| Description | System Admin, user can manually create Quote into the system |
| Assumption | It will be associated with an Opportunity. So, we can create multiple quotes as per customer requirements. |
| Pre-Condition | User would have a detail of Opportunity. |
| Post-Condition | Quote object will be used. |
| Normal Flow | Quote tab will be provided and user will be presented with the following fields.   * Quote Number – auto number format – Noida-2023-2024-01   + Similar format for Faridabad(FB), Indra(IEC) * Quote Name * Opportunity Name * Account Name * Expiration date/ Validity * Delivery Status   + Pending   + Partially Dispatch   + Dispatch * Date of quote * Contact Name * Phone * Email * Syncing * Status   + Draft   + Needs Review   + In Review   + Approved   + Rejected   + Presented   + Accepted   + Denied * Description * Grand Total * Shipping Address * Billing Address   Note: -   * + When quote is created than send reminder should be sent to senior manager and record owner. The send reminder can only be sent when reminder date is filled.   + Discount - Product wise discount will be given on each product. Discount will be put in %age. Discount is not fixed for any product.   + If sales rep wants to enter discount more than 10%. Show an error that you need to get approval to put discount more than 10 %.   + Tax – Product wise tax will be given. Tax field will be given as GST. Tax will come from product directly. Tax percentage for products are 12%, 18%, 28%.   + Offer is maintained on quote in Terms and condition section. Which says offer is valid for 1 week, 14 days, 1 month. If customer doesn’t close the order than offer expiries and new quotation is send to customer.   + Product Price changes - In that time if product price changes than, Signet teams needs to update the price from product masters. Send new quotation after that.   Once quote is marked as accepted, it is considered it is accepted by customer and user will manually sync quote and opportunity will be marked as closed won.  **Bank Account No., GST, Logo, Company Address is different for Faridabad, Indra and signet. 3 pdfs are managed for it.** |
| Notifications | Quote get Attached and send email to customer. |
| Validations | N/A |
| Alternate Flow | N/A |
| References | N/A |

## 

# 

# Manage Quote Line Item

|  |  |
| --- | --- |
| Use Case ID | UC-011 |
| Use Case Name | Create Quote Line item |
| Actors | System administrator, User |
| Description | N/A |
| Assumption | It will be associated with quote. |
| Pre-Condition | Quote will be present in the system. |
| Post-Condition | Quote line item object will be used. |
| Normal Flow | Quote tab will be provided, and user will be presented with the following fields.   * Line-Item Number * Line-Item Description * Product Name * Product Code /HSN Code * Make * Discount % * GST * Quantity * Unit price (Original price of product) * Net unit price (Discounted amount) * Total (Net unit price \*qty) * Packaging and forwarding - percent. * GST (Tax) – product wise – 12%,18%,28% * Grand Total (Including GST) * Lead Time – text * Description   Note:-   * + Discount - Product wise discount will be given on each product. Discount will be put in %age. Discount is not fixed for any product.   + If sales rep wants to enter discount more than 10%. Show an error that you need to get approval to put discount more than 10 %.   + Tax – Product wise tax will be given. Tax field will be given as GST. Tax will come from product directly. Tax percentage for products are 12%, 18%, 28%. |
| Notifications | N/A |
| Validations | N/A |
| Alternate Flow | N/A |
| References | N/A |

# Create Case

|  |  |
| --- | --- |
| Use Case ID | UC-012 |
| Use Case Name | Create Case |
| Actors | System administrator, GM, Marketing users |
| Description | Case will be created for complaint. |
| Assumption | NA |
| Pre-Condition | User must have the access to Create and Edit records. |
| Post-Condition | Case record has been created into the CRM. |
| 6+Normal Flow | * User will be created Case manually into the CRM. * Case can be created in three ways:-   + Email-to-Case (Routing Address - contact@signetpower.com)   + Web-to-Case   + Call-to-Case * Once User clicks on “NEW” button from Case tab, System will show following Information: * Case Number- Auto number * Name * Email Address * Phone * Product * Account Name – Lookup * Status \*   + New   + In Progress   + Waiting on Customer   + Escalated   + Closed * Priority\*   + Critical   + High   + Medium   + Low * Course * Subject\* * Contact Phone * Contact Mobile * Contact Email * Escalated\* * Date/Time Closed\* * Date/Time Opened\* * Description\* * Internal Comments\*   Note: -   * Case will be directly assigned to back-office User Neha (contact@signetpower.com) has the right to assign the case to anyone from her team. * Case escalation after 48 hrs to General manager (Shikhar Tyagi) in case of Signet and Indra than to Managing Director. Case will be done if case status is still open for 48 hrs. If status changes to In progress no escalation will be triggered. * In case of escalation of Faridabad, case will assigned to GM(Faridabad) than escalated to MD. Process will be same as above |
| Notifications | N/A |
| Validations | N/A |
| Alternate Flow | N/A |
| References | N/A |

# Manage Activities

|  |  |
| --- | --- |
| **Use Case ID** | **UC-013** |
| **Use Case Name** | Create Activities |
| **Actors** | System Administrator, General Manager, GM(Faridabad), Marketing Head. |
| **Description** | User can create task and event with Activity management. |
| **Assumption** | N/A |
| **Pre-Condition** | User must have the access to Create and Edit activities. |
| **Post-Condition** | User will be able to set an activity as per the requirement. |
| **Normal Flow** | User can perform the following activity:     * Log a call - User will log a call after a record created in the CRM system for further follow-up or client last call communication. It includes.   + - Subject     - Comments     - Name * New Task - User will create a new task for task reminder on particular time and salesforce CRM display remind it by reminder window notification on schedule or before time. It includes   + - Subject     - Due Date     - Name     - Priority     - Assigned To     - Status * New Event - User will create a new event for event reminder on particular time and salesforce CRM display remind it by reminder window notification on schedule or before time. It includes   + - Subject     - Start Date     - End Date     - Start Time     - End Time     - All-Day Event     - Name     - Description     - Location     - Purpose (Picklist) * Email - User will be able to send an Email to anyone. It includes   + - From     - To   + Subject |
| **Notifications** | Notification will be sent to the related user. |
| **Validations** | N/A |
| **Alternate Flow** | N/A |
| **References** | N/A |

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# Reports and Dashboard

|  |  |
| --- | --- |
| **Use Case ID** | **UC-014** |
| **Use Case Name** | Report and Dashboard |
| **Actors** | System Administrator |
| **Description** | A report is a document that presents information in an organized format for a specific A data dashboard is an information management tool that visually tracks, analyses and displays key performance indicator’s purpose. |
| **Assumption** | The user has access to create reports and dashboards. |
| **Pre-Condition** | Data models are ready to create and filter the report data. |
| **Post-Condition** | Reports will be created and will be placed into a specified folder which can be shared with any user or user roles.  Only 2 Dashboards will be created, one for Administrator and One for rest of the other team. |
| **Normal Flow** | The following reports will be generated into the CRM as per the data: To be discussed in detail.   * To Dos (Activity) * Standard Dashboard |
| **Notifications** | N/A |
| **Validations** | N/A |
| **Alternate Flow** | N/A |
| **References** | N/A |

**Accepted on behalf of Signet Power.**

**Authorized Signatory**