Functional Requirements Document - Sales

Prepared for

Technica

Version: **2.0**

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Introduction

1.1 Purpose

The Functional Requirements Document (FRD) describes in common terms:

- An overview of the processes comprising each Work stream
- An overview of each sub-process comprising the Work stream
- Major gaps between the business requirements and the functionality supported by the standard Microsoft Dynamics 365 solution
- The problem summary including current business/environment issues
- Proposed technology to support the new or altered business processes
- How implementation of the proposed solution will benefit the users/stakeholders

The FRD is the starting point of the solution and system development and is a collaborative effort between all business and technology stakeholders. The purpose of the Functional Requirements Document (FRD) is to document requirements for the requested system solution.

The objective of the Functional Requirements Document is to provide enhanced documentation for requirements that are a gap or will require a workaround or process change in order to fit the system solution of the client. The need for any modifications is clarified through the FRD. The FRD forms the basis of the subsequent task concerning the system design.

This document focuses on Sales requirements.

1.2 Acronyms

Abbreviation	Explanation
FRD	Functional Requirement Document
System	Dynamics 365
OOB	Out of the box

1.3 General

Technica's Sales Process could take between 9 months to 1.5 years and still after that, opportunities can be lost. During this stage Technical invests a lot of time and effort into winning any opportunity and they want to track this cost. In this document I am going to capture Technica's Sales processes.

To understand Technica's sales process, you need to know that there are two major players, the Sales who are in constant contact with the customer and the Sales Support who cook up the quotation later on based on the requirement gathered by the Sales team.

simulate: create visits, trips and mission request (customer activities)
check if expense management can be allocated to a project

This document will handle the roles of the Sales team and their managers.

In order to secure a sale Technica's sales team have to make constant visits to the customers, to do that the Sales Engineer prepares trips & missions requests on which he plans to visit, Leads and Prospects. **Trips and visits encompass more than just prospects and leads; they can also serve as follow-up activities after project installations or check-up visits for existing clients. Trips and missions can involve various activities such as tasks, appointments, phone calls, emails, fax, and more.** use case management

The Sales Engineer then creates leads to qualify them into opportunities or disqualify them.

The opportunity can be created or generated from a lead. The Sales Team then gathers data and fills the DFI to allow later on the Sales Support to issue a quotation from F&O.

create leads then opportunities to simulate issuing a quotation

Business Processes List

1.1 Processes List

In order to elaborate and define the functionality, the following processes have been presented in the subsequent sections:

Process ID	Name	Description
SP001	Trips & Missions	Submit Trips & Missions Request for Approval
SP002	Leads	Leads Registration & Qualification
SP003	Opportunities	Qualified & Registered Opportunities Process

Business Processes

1.1 SP001 Trips & Mission

1.1.1 To-be Process

simulate on expense management

there are activities to be simulated

Submit trip request

- Sales engineer creates a new trip request
- Sales engineer fills all trip related info (title, start date, end date, country, description, expected cost,...)
- Sales engineer creates set of tasks and appointments related to the trip
- Sales engineer submits trip request.

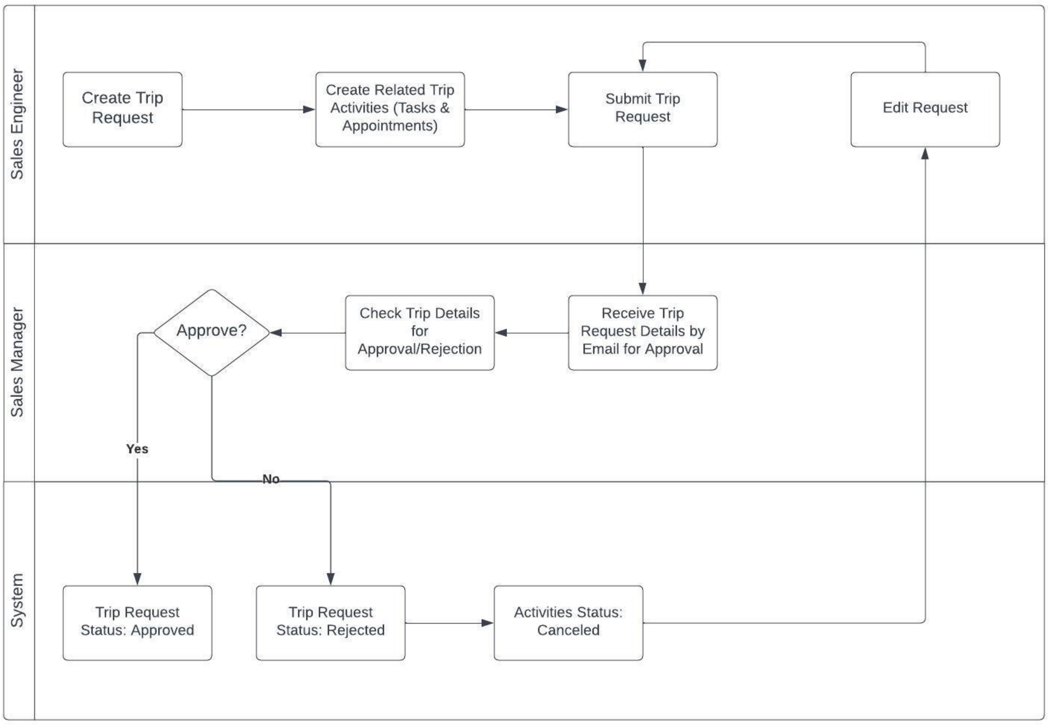
Initiate approval cycle

- When the request is submitted, sales manager receives an email containing the trip details and link to the trip record along with approval or rejection button
- Sales manager has the ability to approve/reject from the email itself or from the record.

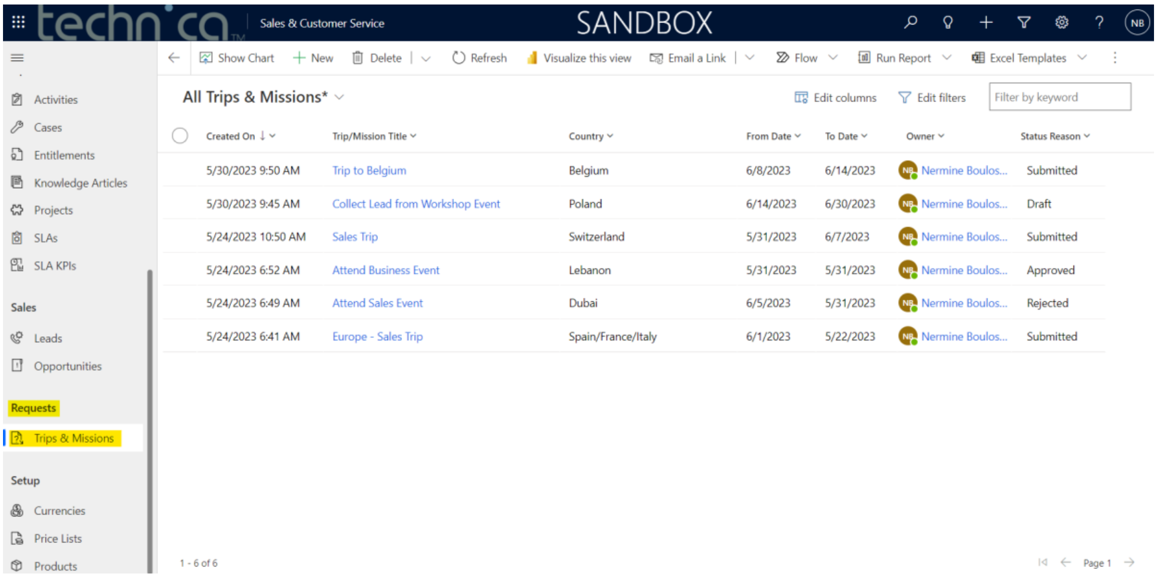
workflow with notification

Trip Request is either approved or rejected

- Upon manager's action the trip request status changes accordingly
- When the request is approved, email is sent to HR
- **When the request is rejected, the tasks and appointments are cancelled.**
- **When the request is rejected, the sales engineer can modify some info or add additional comments and re-submit for approval**



The trip requests will be registered under the requests section in the Trips & Missions



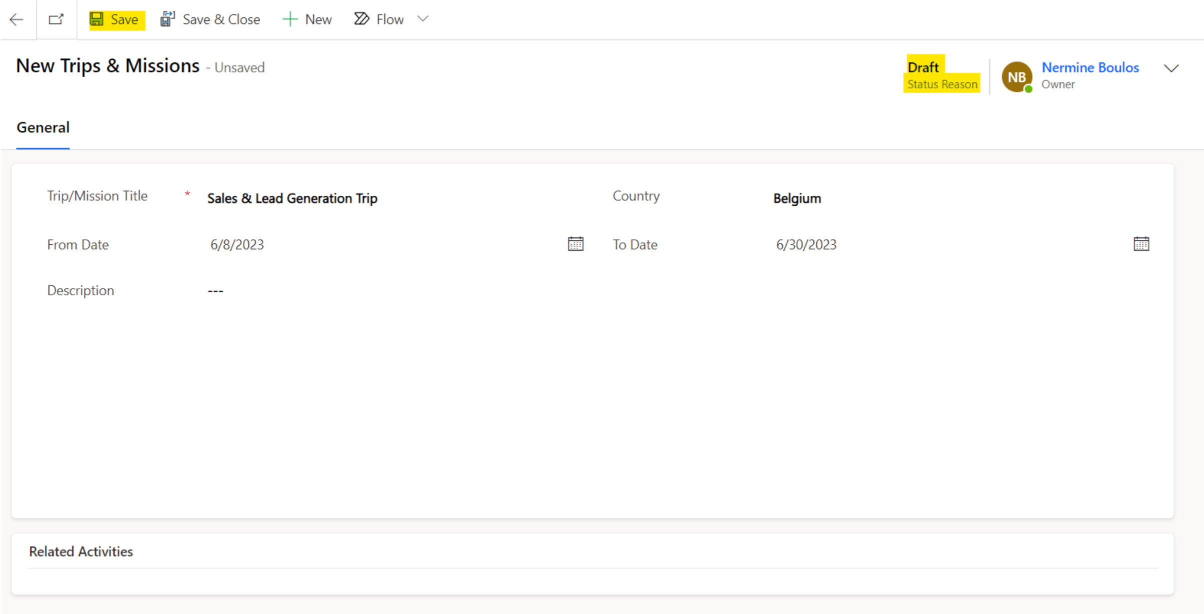
🏳GAP:

The trips & missions' entity is not out-of-the-box solution so it will require customization in addition to automation of the approval cycle and some scripts for date and time validation.

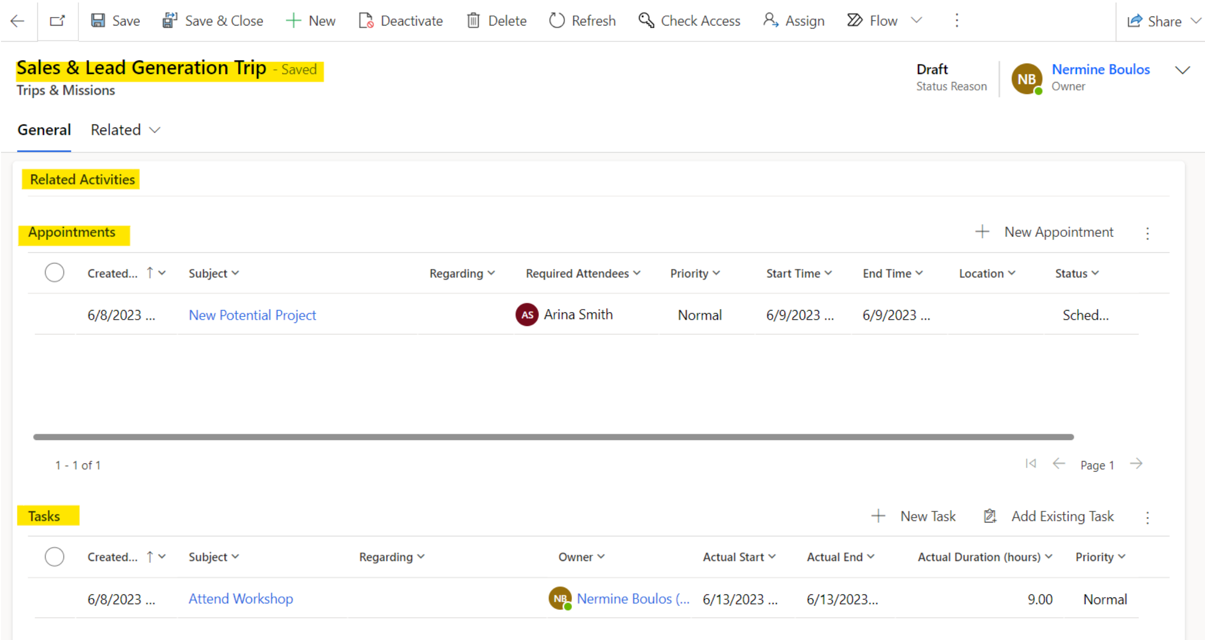
Number	Description	
UAT-1.	**Trips & Missions Requests Submissions**	GAP

1.1.1.1 Creating Trip Request

1. Sales engineer will create the trip request which will have draft status by default and save the request.



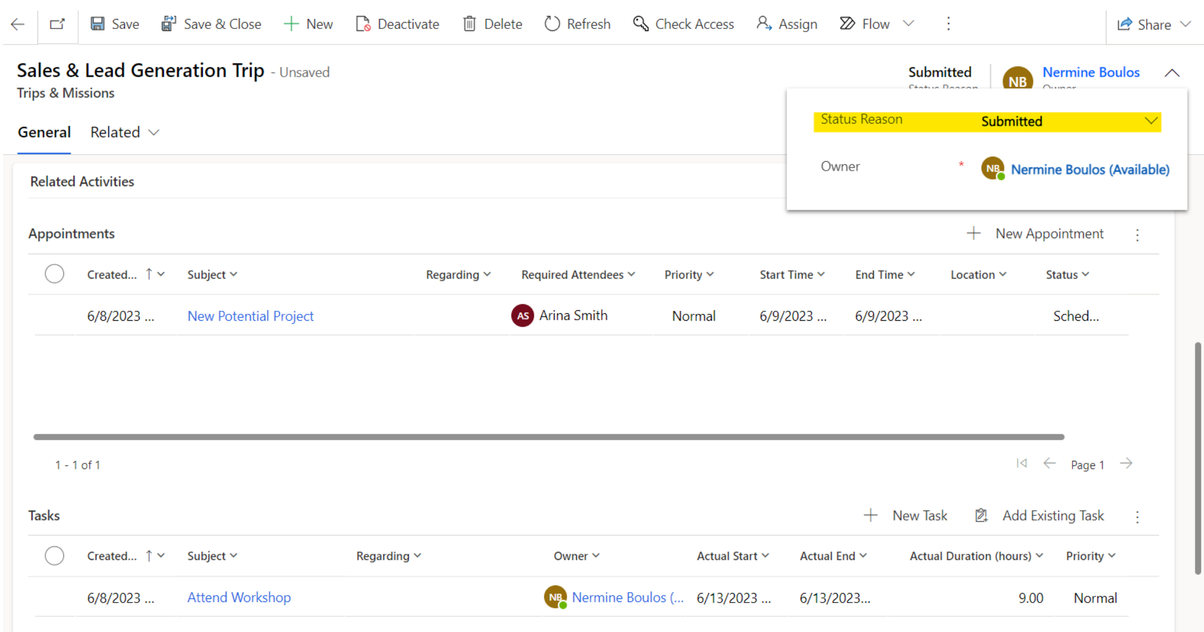
2. Upon saving, sales engineer will be allowed to add related activities (tasks & appointments). **Each activity within a trip can be associated with different leads, opportunities, or projects.**



- **Additional fields will be added to the trip request such as rejection reason and cost.**
- **Additional fields will be added to the related activities such as last visit date.**

1.1.1.2 Submitting Trip Request

1. Once request is ready for submission, sales engineer must change the request status from draft to submit for approval



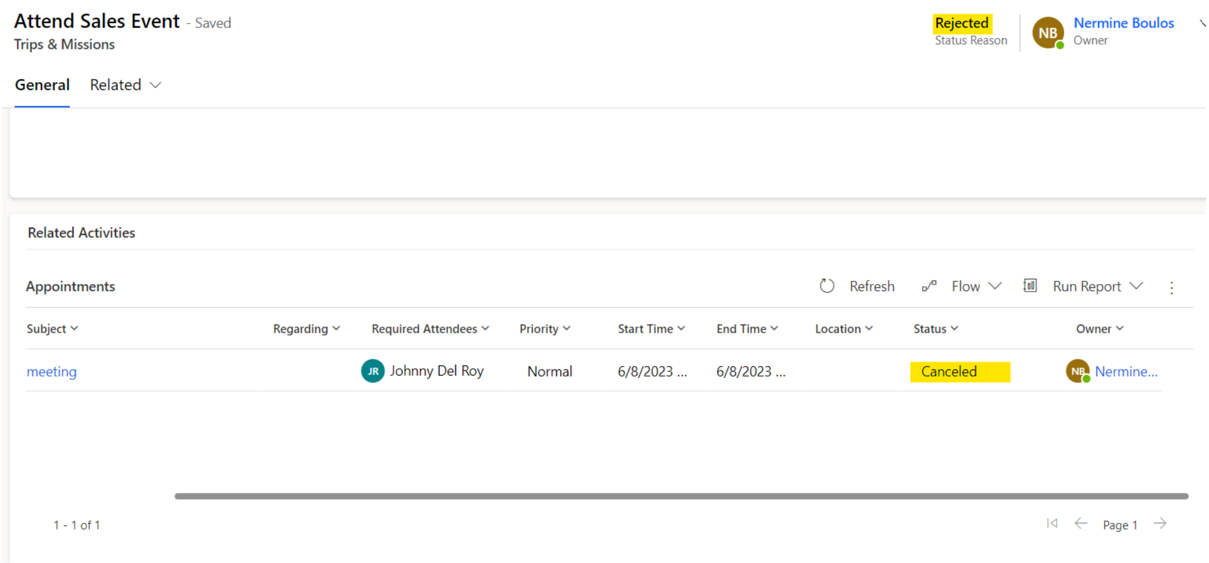
2. Upon submission, an email is received by sales manage for approval or rejection

1.1.1.3 Approval Cycle

Approval flow of events

Rejection flow of events

1. The email received by sales manager will have all the request details and a link to access the related record.
2. The sales manager response can be taken from the email and then reflected on the request status. Or from a button inside the record.
3. A rejected request, will cancel all tasks and appointments. **The manager has the capability to provide comments or descriptions when rejecting a submission, allowing the sales engineers to address the associated issue and resubmit accordingly.**



4. Upon approval, HR will receive an email that a trip request was approved and Request will be integrated in F&O as a Travel Requisition draft record:
    - Request header will be automatically filled from CRM data
    - User later on will access F&O to fill the request details (expense categories, estimated date, amount, currency)
    - The request shall be subject to workflow approval
        - **Note that this point will be listed in details in the Expenses Management FRD.**
5. Rejected request can be resubmitted.

1.1.2 Requirements

ID	Desc	Fit/GAP
SP001-001	Create Trips & Missions	GAP
SP001-002	Approval Cycle for trips & mission	Fit
SP001-003	Integration with F&O	GAP

1.2 SP002 Leads

1.2.1 To-be Process

to simulate this process with leads and qualify process

Create new lead

- Create lead manually or import leads
- Leads can be existing company/contact or new one

Request qualification approval

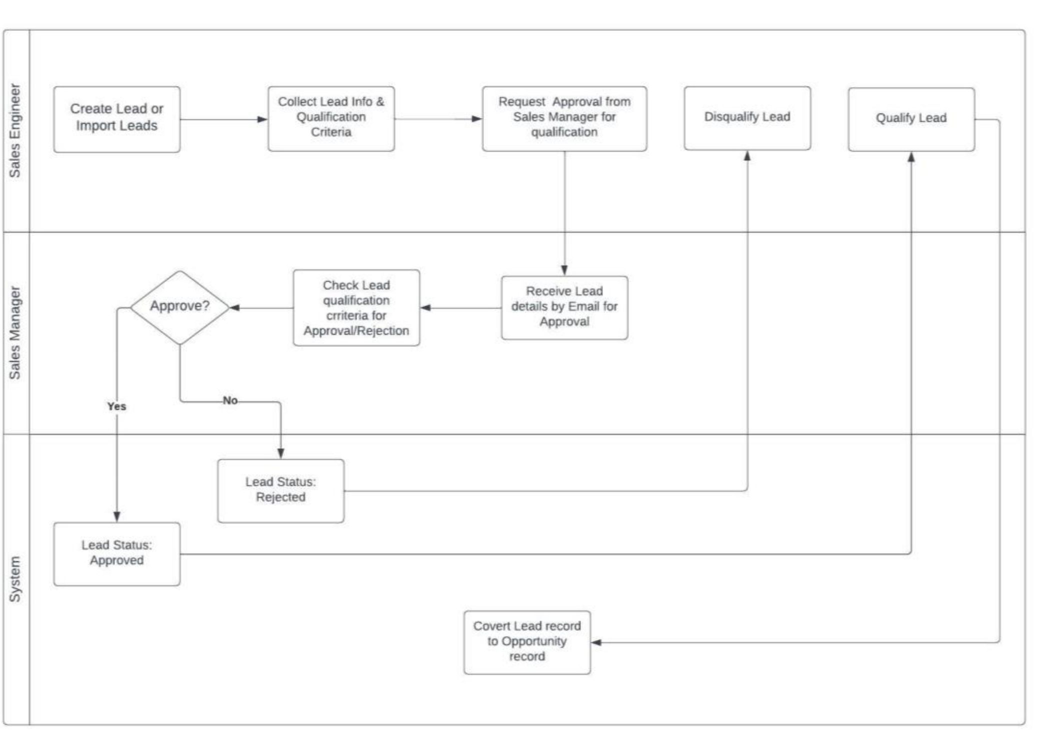
- Collect qualification criteria. **The Qualification Process encompasses specific conditions that must be met for a lead to be submitted for approval and converted into an opportunity. By meeting these conditions, the lead can proceed to the next stage and be designated as an opportunity within the sales pipeline.**
- Request approval from sales manager for lead qualification

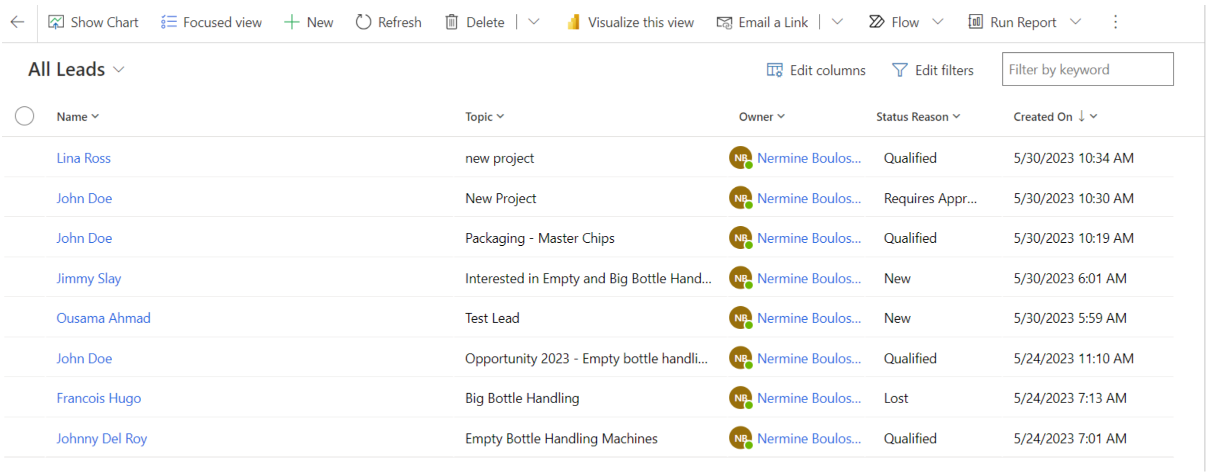
Approval Cycle Initiated

- Sales manager receives an email with lead details and collected criteria
- Qualification request is either approved or rejected

Lead qualification/disqualification

- If approved, qualify lead. Will be converted into an opportunity. Disqualification will be restricted
- If rejected, disqualify lead. Qualification will be restricted





Name	Topic	Owner	Status Reason	Created On
Lina Ross	new project	Nermine Boulos...	Qualified	5/30/2023 10:34 AM
John Doe	New Project	Nermine Boulos...	Requires Appr...	5/30/2023 10:30 AM
John Doe	Packaging - Master Chips	Nermine Boulos...	Qualified	5/30/2023 10:19 AM
Jimmy Slay	Interested in Empty and Big Bottle Hand...	Nermine Boulos...	New	5/30/2023 6:01 AM
Ousama Ahmad	Test Lead	Nermine Boulos...	New	5/30/2023 5:59 AM
John Doe	Opportunity 2023 - Empty bottle handli...	Nermine Boulos...	Qualified	5/24/2023 11:10 AM
Francois Hugo	Big Bottle Handling	Nermine Boulos...	Lost	5/24/2023 7:13 AM
Johnny Del Roy	Empty Bottle Handling Machines	Nermine Boulos...	Qualified	5/24/2023 7:01 AM

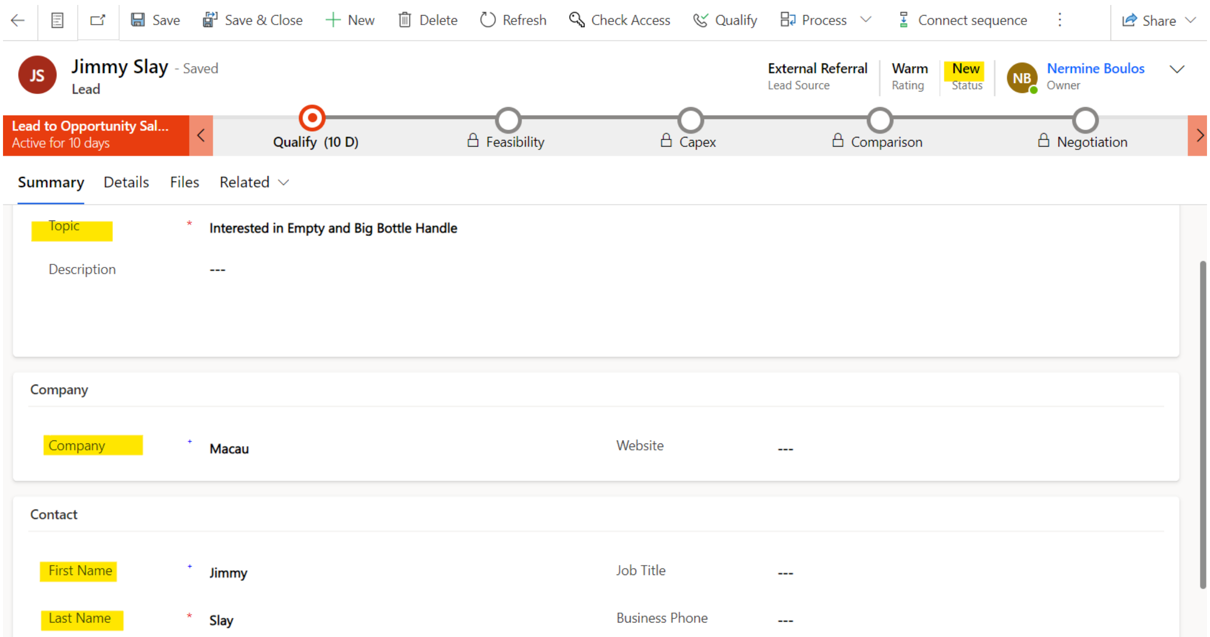
GAP:

Usually, there is no approval cycle neither restriction for the lead qualification/disqualification process in the OOB the solution.

Number	Description	
UAT-2.	**Sales Manager Approval Cycle**	GAP

1.2.1.1 Creating Leads

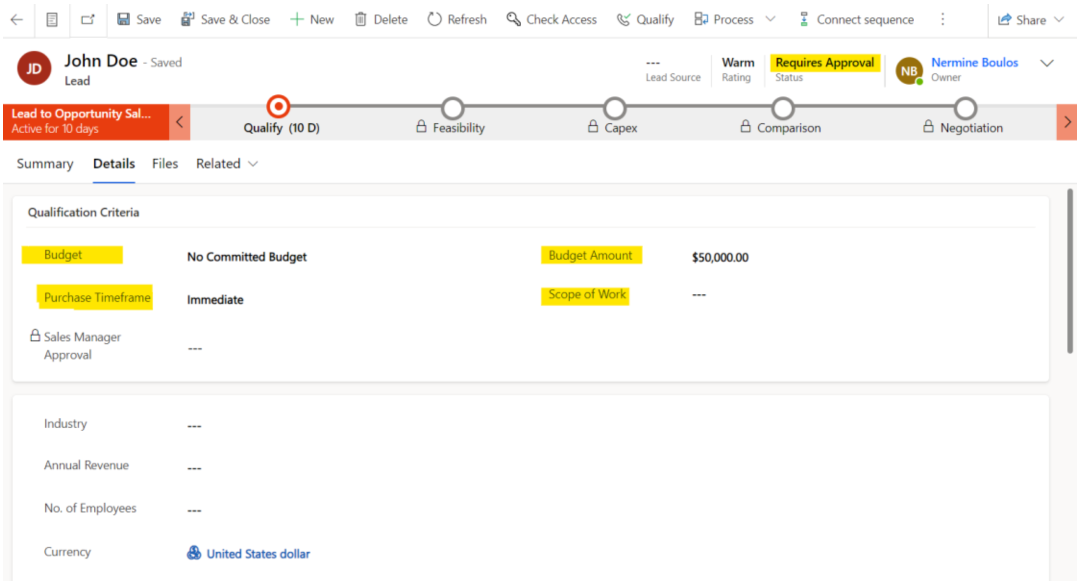
i. Leads are created manually or can be imported from an excel sheet
ii. Lead creation requires a topic, and a customer (account/contact or both). The lead can be an existing contact or a new contact
iii. When the lead is created, he will be labelled as New.



1.2.1.2 Request Qualification Approval

i. To qualify the lead, the Sales Team collects qualification criteria related to budget, timeframe and scope of work.

ii. Lead conversion to opportunity cannot be done at this stage. Sales Team must change the lead's status to request Sales Manager Approval for qualification.



1.2.1.3 Approval Cycle

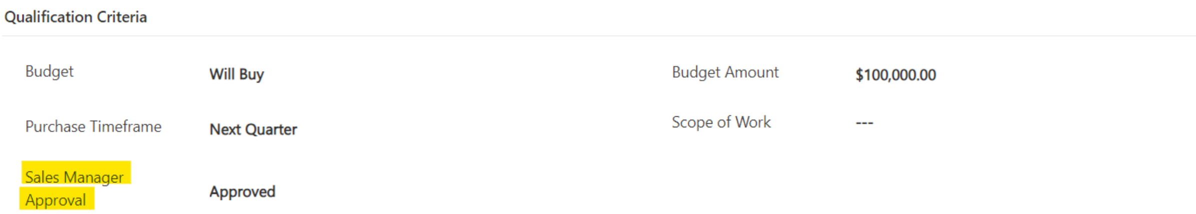
check if workflow or use alerts exists on lead qualifications

Approval flow of events

Rejection flow of events

i. Upon status changing, Sales Manager will receive an email notification with all the lead's details and a link to the lead's record in the system to either Approve or Reject the lead's conversion. alert

ii. Manager's response will be captured by the system.

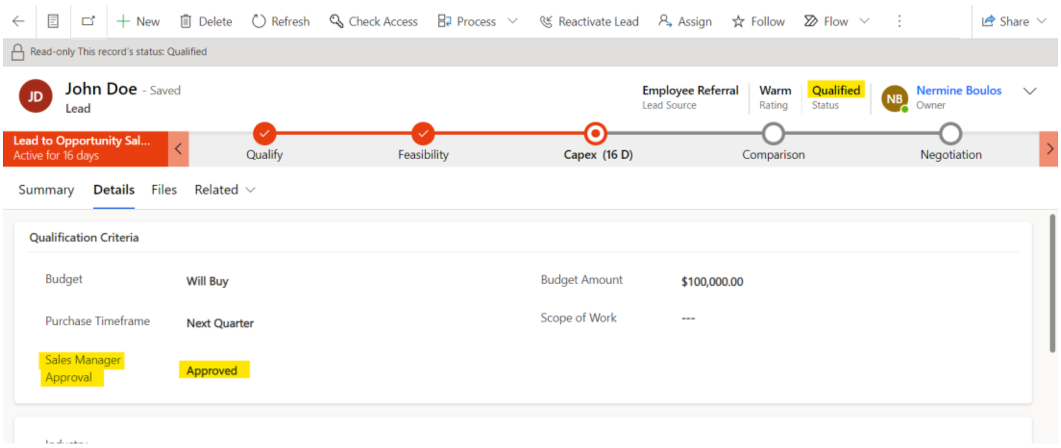


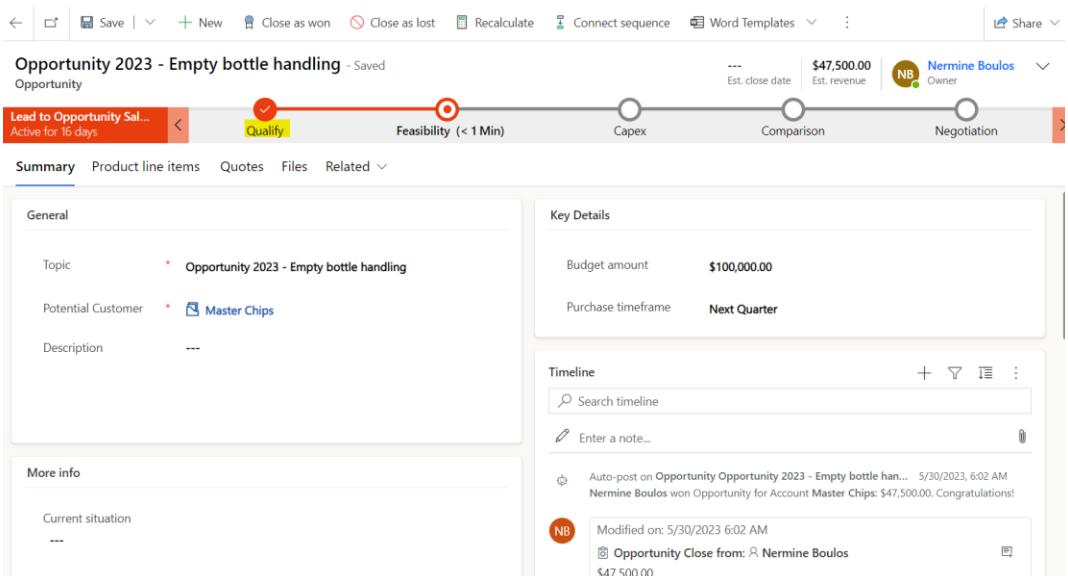
Qualification Criteria

Budget	Will Buy	Budget Amount	$100,000.00
Purchase Timeframe	Next Quarter	Scope of Work	---
Sales Manager Approval	Approved		

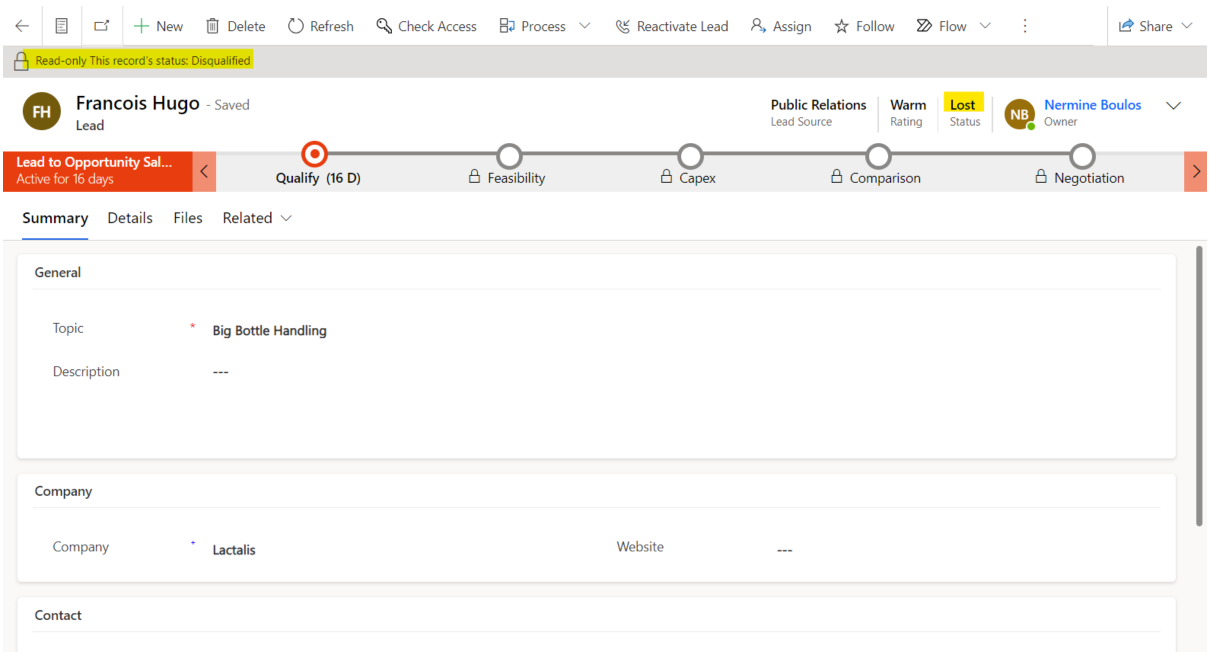
1.2.1.4 Lead Qualification/Disqualification

i. Qualification is done by Sales Engineer after getting his manager's approval. If not, qualification will be restricted. Qualifying a lead, creates automatically an opportunity record that is linked to the originating lead. simulate qualifying a lead





ii. Disqualification is done by Sales Engineer after Sales Manager rejects qualification.



1.2.2 Requirements

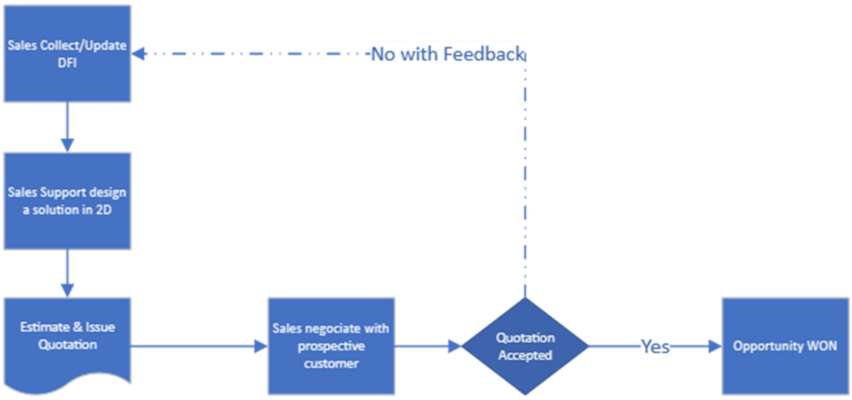
ID	Desc	Fit/GAP
SP002-001	Create/Import Leads	FIT
SP002-002	Approval Cycle for Lead Qualification	GAP
SP002-003	Lead Qualification	FIT
SP002-004	Lead Disqualification	FIT

1.3 SP003 Opportunities

The Opportunity module in Dynamics 365 Sales aims to provide a comprehensive and efficient way to manage sales opportunities throughout the sales lifecycle. This document outlines the functional requirements for the Opportunity module.

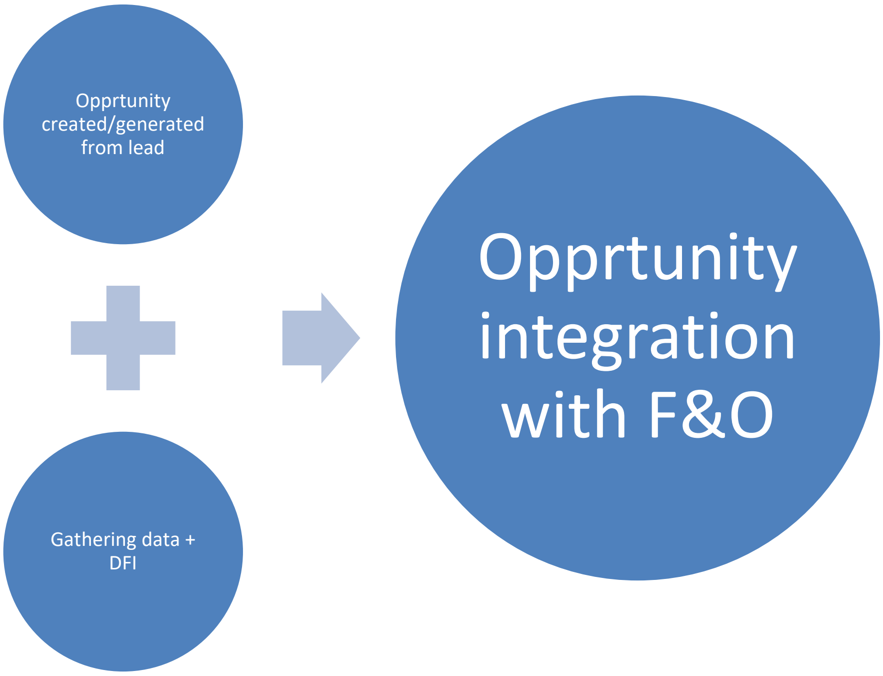
1.3.1 To-be process (General)

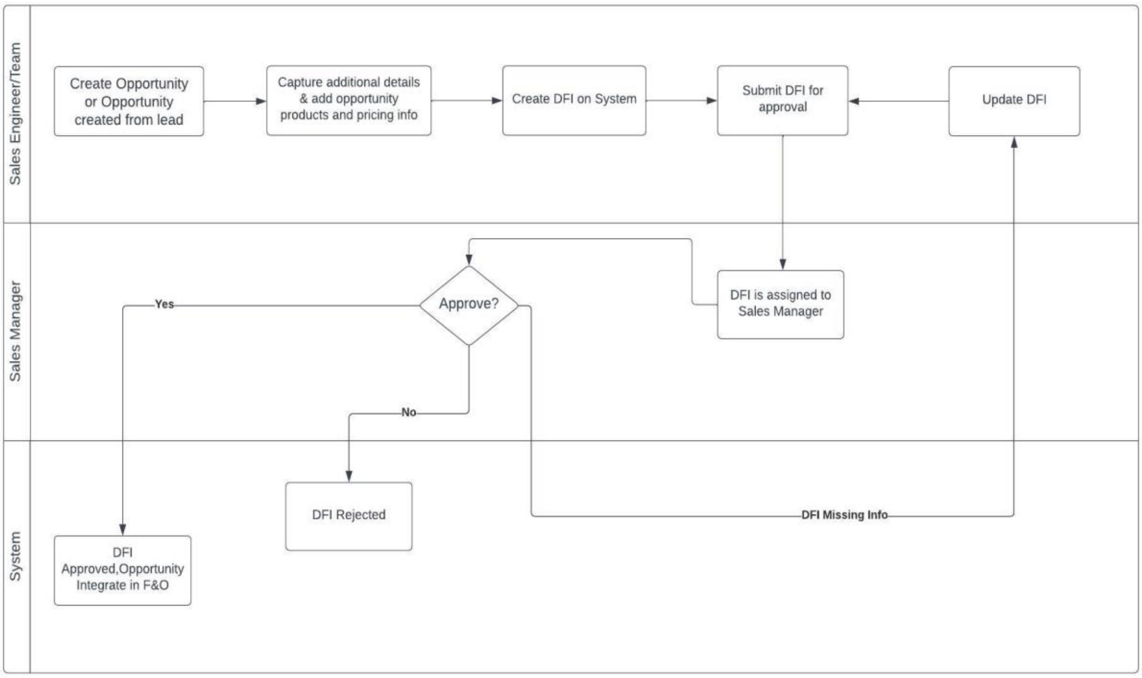
The opportunity is an active situation where the prospective customer is going over options for a solution, during this stage, the sales and sales support are going back and forth to present the best quotation to the prospective customer:



In this opportunity module we will only handle all the opportunity stages. The Opportunities will be integrated from CRM to D365 F&O, and that is where the quotation will be generated..

1.3.2 To-be process (Specific)



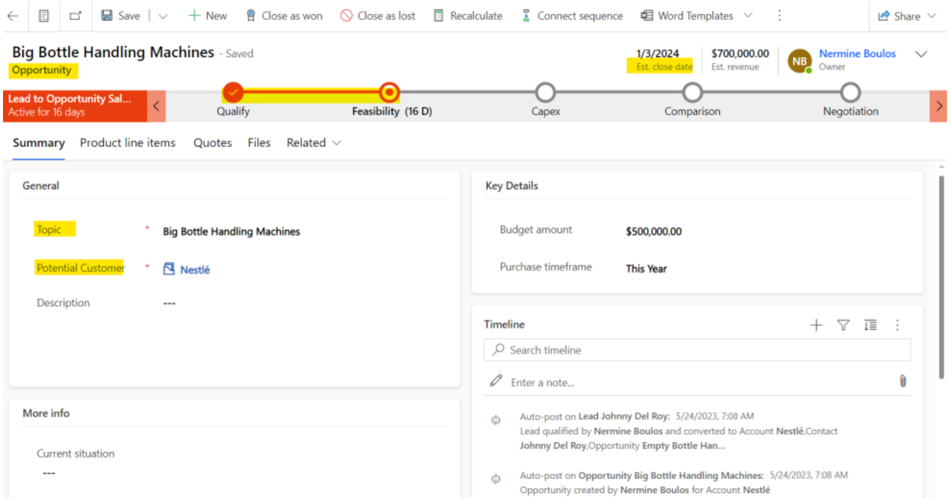


1.3.2.1 Opportunity Management

1.3.2.1.1 Create Opportunity

simulate using opportunity in d365 fo

- Sales representatives can create new opportunities, capturing key information such as opportunity name, customer/contact details, opportunity value, expected close date, and probability of closure or the opportunity is created automatically after lead qualification. **Additional fields related to buyers can be added.**

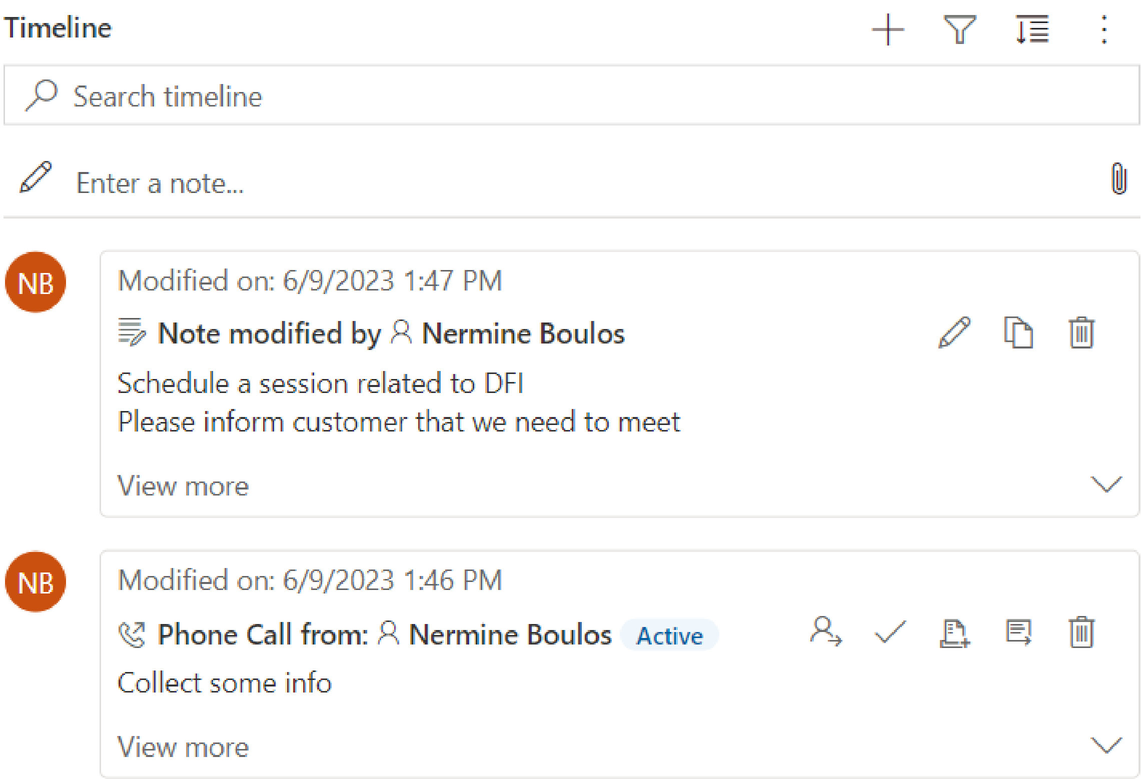


- The sales team can associate opportunities with relevant accounts and contacts in the system.
- The sales team will be able to capture additional details, such as opportunity type, lead source, and opportunity stage.

1.3.2.1.2 Opportunity Tracking

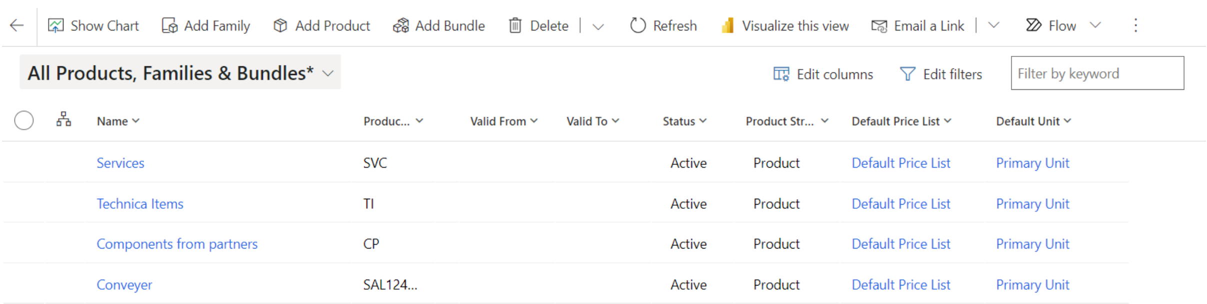
- The sales team will update and track the progress of opportunities through different stages, reflecting the sales process shown in the screenshot below
- The sales team can define and customize opportunity stages and track the probability of closure at each stage.

- The sales team will be able to record key activities and interactions related to the opportunity, such as meetings, calls, and emails.



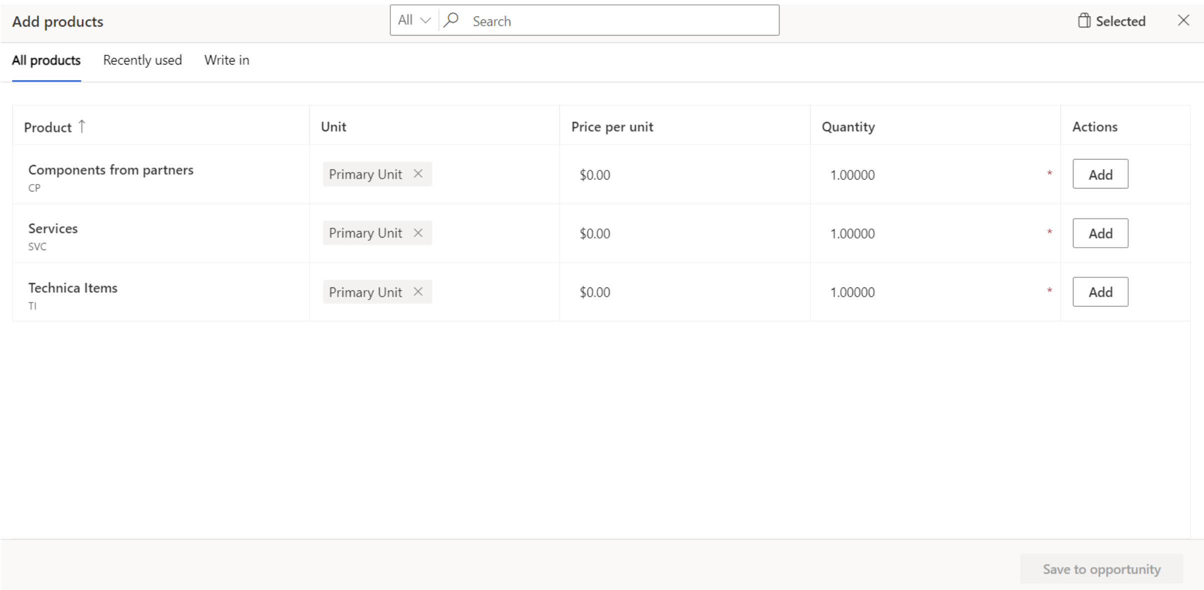
1.3.2.1.3 Opportunity Products and Product Catalog

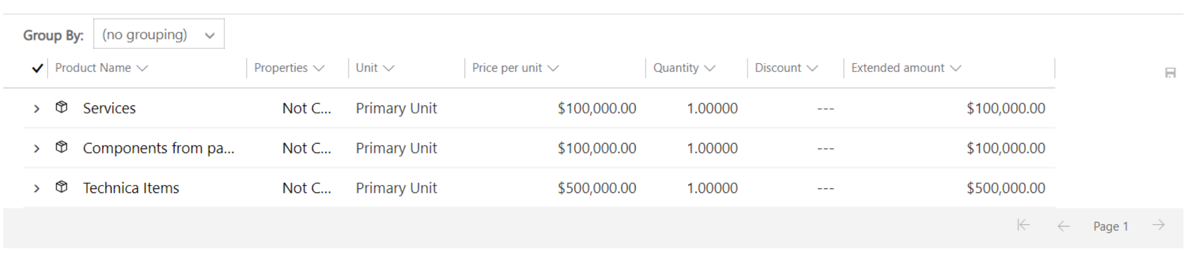
- The sales team will be able to link opportunities to products and pricing information from the product catalog. (Product Catalog is handled in the products section where you can define your initial products along with their units, and later on you can add products).



Name	Produc...	Valid From	Valid To	Status	Product Str...	Default Price List	Default Unit
Services	SVC			Active	Product	Default Price List	Primary Unit
Technica Items	TI			Active	Product	Default Price List	Primary Unit
Components from partners	CP			Active	Product	Default Price List	Primary Unit
Conveyer	SAL124...			Active	Product	Default Price List	Primary Unit

- Enable sales representatives to add opportunity products and configure pricing details specific to each opportunity.

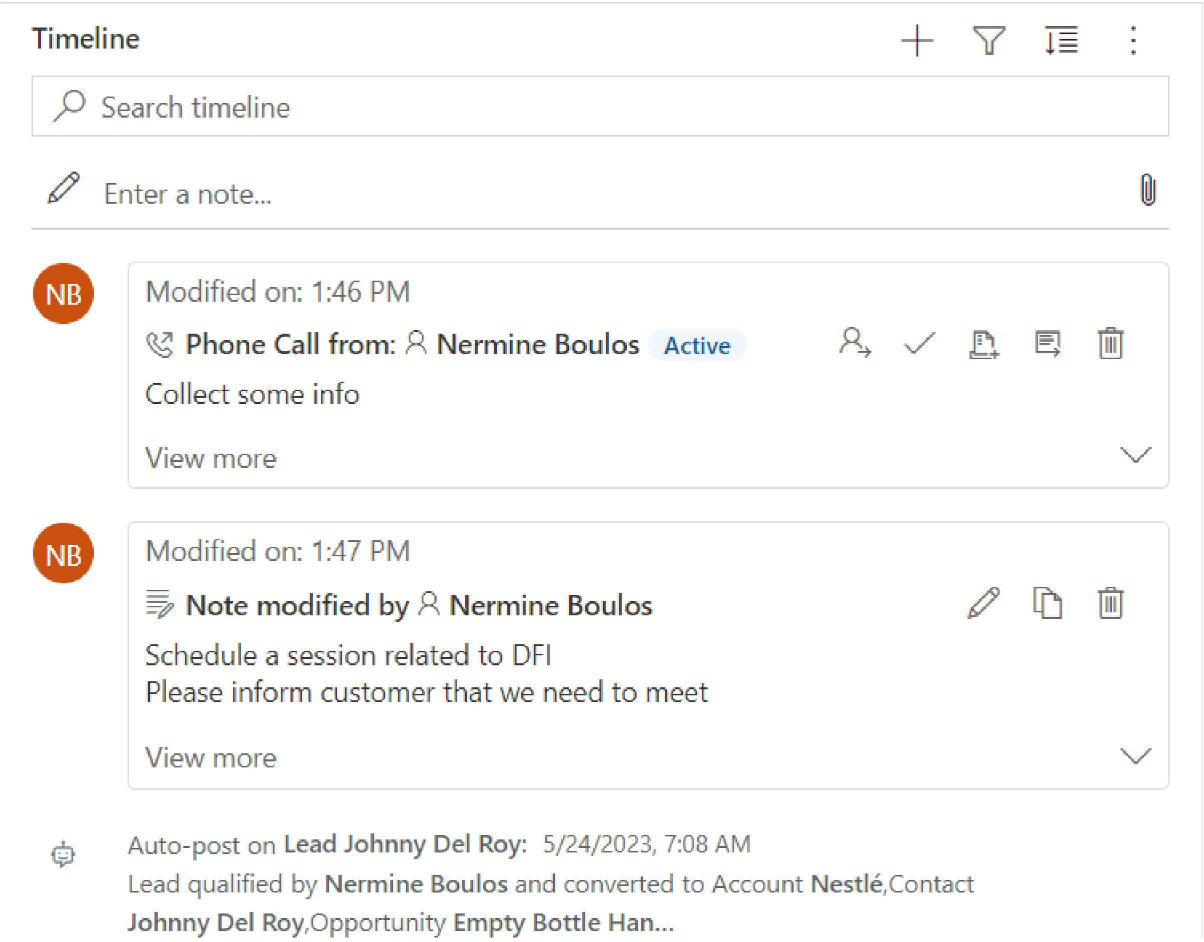




1.3.2.1.4 Opportunity Collaboration

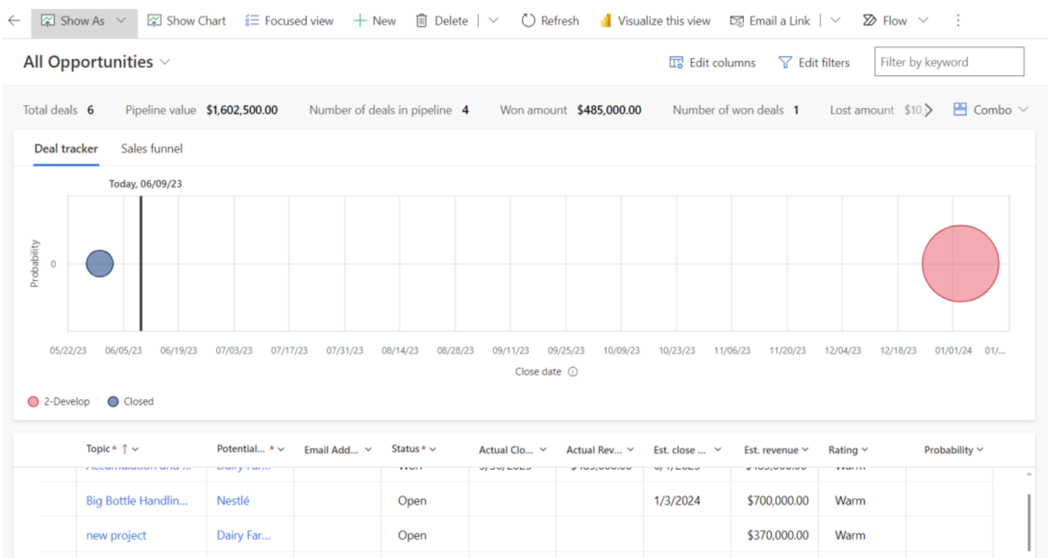
- Enable collaboration among team members by allowing them to share and access opportunity-related information.
- Sales team will be able to assign and reassign opportunities to sales representatives or even teams.
- Allow team members to add comments, attach documents, and share updates on the opportunity record.

simulate in sales process in opportunity



1.3.2.1.5 Opportunity Forecasting

- Enable sales representatives and managers to forecast revenue based on opportunities.
- Provide visibility into the sales pipeline and expected revenue, helping sales managers make informed decisions and prioritize efforts.



1.3.2.2 DFI (Data for Inquiry)

The DFI is a requirement gathering form that allows the Sales Support to issue a quotation; the DFI is collected by the Sales team during the initial phase

- Strategic
- Customer Requirements create these in sales process to simulate the cycle
- Technical Data
- Handlift
-

	A	B	C	D	E	F	G
1	Company:		Date:		% Project Realization:	Feasibility	
2	Country:		Prepared by:		% Technica Success:	25%	
3	Contact:		Offer needed by:		Decision time:		
4	Project		Online platform	no	Type of Offer :	Budget	
5	Description:		Contributor:				
6	Project Source:						
7							
8	**Customer Evaluation**		**Sales evaluation**	**Sales comment**	**Weight**	**Strategic grade**	
9	Customer is quality driven		N/A		10%	0%	
10	Customer is price driven		N/A		10%	0%	
11	Multinational		N/A		10%	0%	
12	Top 10 producers in his region/sector (key customer)		N/A		10%	0%	
13	Project is door opener, if yes, why?		N/A		10%	0%	
14	We have good relation with the customer		N/A		10%	0%	
15	**Market potential**					**Customer grade**	**0%**
16	Projet will be repeated with same customer, potential of roll out		N/A		10%	0%	
17	Projet will be repeated with other customers, potential of standard solution		N/A		10%	0%	
18	**Investment Evaluation**					**Market potential grade**	**0%**
19	Capex is approved by customer.		N/A		30%	0%	
20	Number of years required for the payback of the project		N/A		10%	0%	
21	Capex value amount					**Investment grade**	**0%**
22	Expected solution value	add grade ()	200.000 - 500.000 Euros				
23	**Competition Evaluation**						
24	Competition is known		N/A		10%	0%	
25	Competition is matching customer expectations for solution, budget and lead time		N/A		10%	0%	
26	Competition are entrenched (previous projects, references)		N/A		10%	0%	
27	What is technica required competitive edge for this project					**Competition grade**	**0%**
28					Sales Grade	0%	
29	**Technical Evaluation**						
30	Percentage of the project standard equipment		0%		40%	0%	
31	Percentage of the project non-standard equipment but within competencies		0%		30%	0%	

Strategic | Customer requirements | Technical Data | Handlift | +

GAP:

The DFI will be digitally **transformed (The strategic part of the DFI mainly should be part of the CRM)** as it is needed for reporting purpose later; in order for this to happen a new entity needs to be developed from scratch.

Number	Description	
UAT-3.	**Create DFI record and attach on opportunity**	GAP

- DFI record will reference one and only one opportunity
- DFI will have multiple versions
- DFI will be submitted for approval
- DFI will be transformed but will be there purely for reporting purposes. So, it will not have any effect on the process itself

1.3.2.3 DFI Detailed Solution Design

- One opportunity will have multiple DFI records.
- Each record represents a new DFI version
- DFI records are seen as a grid in the opportunity form.
- By adding a new record from the grid (in other words creating the first version of the DFI) the DFI will be linked to the corresponding opportunity.
- To create a new version and adjust. You will not have to create a DFI from scratch. The latest version of the DFI will be duplicated with a different version number and then you can modify the fields. So yes, previous versions will be logged.
- Regarding the approval, each DFI version when completed will be submitted for approval if approved, then opportunity will be integrated to F&O. If not approved, remarks can be add to it. So, the engineer will check when it is rejected and will create a new version which will be the same as the latest and then he will modify the necessary and re-submit for approval. And same cycle will go on until DFI version gets approved.

1.3.3 Requirements

ID	Desc	Fit/GAP
SP003-001	Create Opportunity	FIT
SP003-002	Create DFI	GAP
SP003-003	Integrate Opportunity to F&O	GAP

- **When opportunity is won in F&O the info will be synced into CRM and a notification will be received for the won opportunity.**

Accounts & Contacts Management

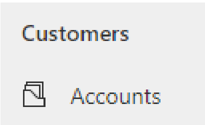
Account and contact records store much of the information that you and your team collect from your customers. You store data about companies you do business with in accounts. Similar to Microsoft Office Outlook or other email programs, you store data about the people you know and work with in contacts.

Usually, an account has more than one contact associated with it, especially when you're working with a larger company with many departments or locations and you deal with several people to manage the account.

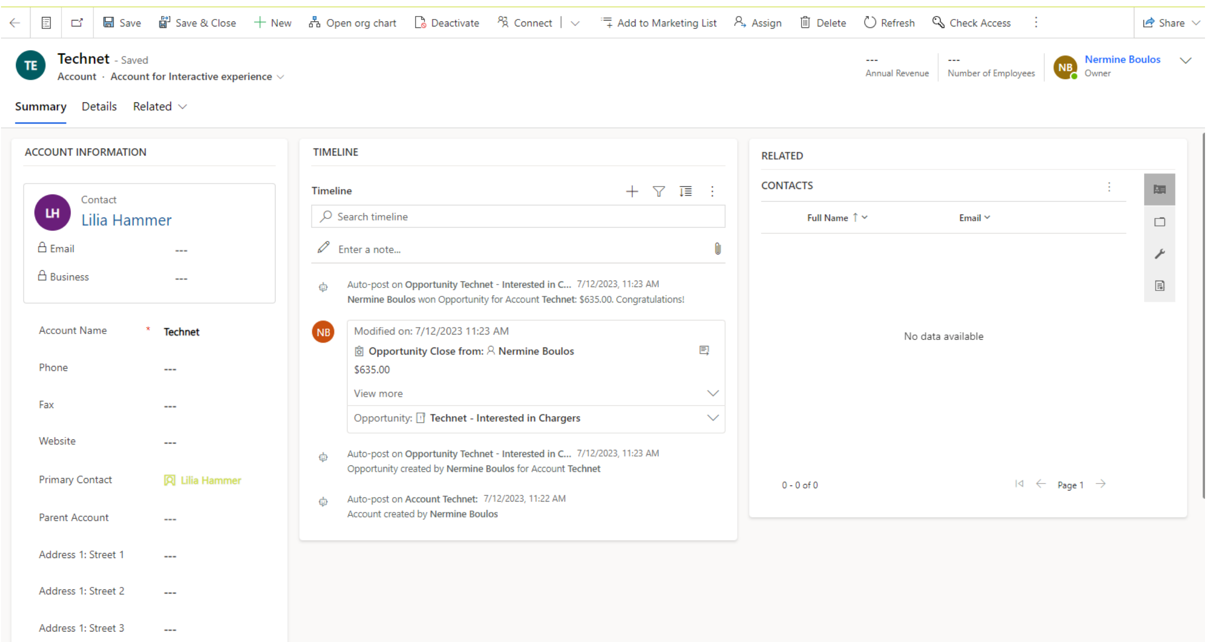
You can create accounts and contacts manually or import them from a spreadsheet or other supported files.

2.1 Create Account

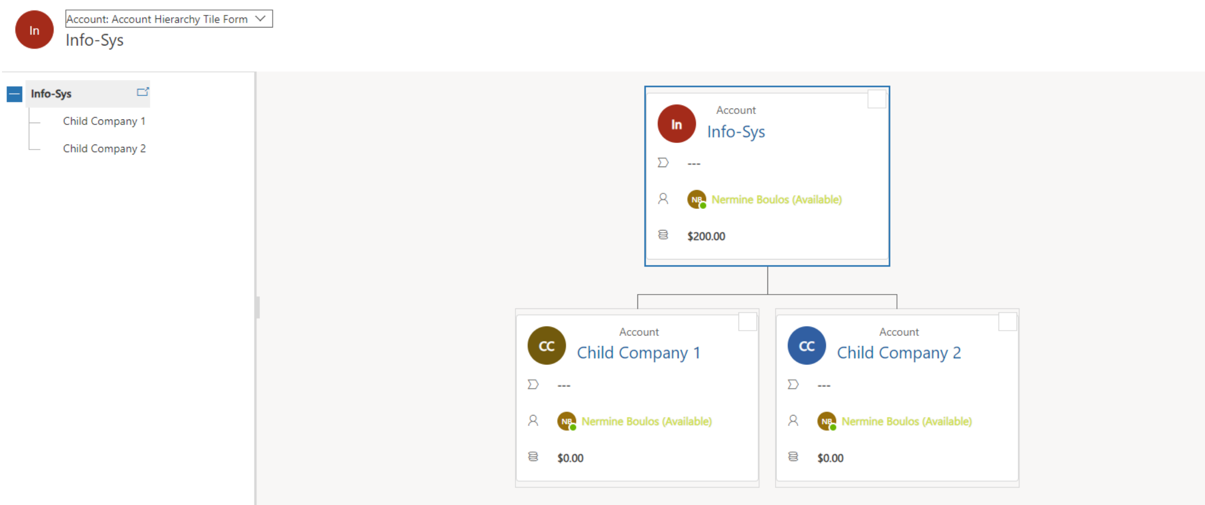
1. In the site map, select Accounts.



2. Specify the details that you know about the company and save the changes.

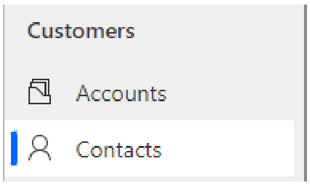


3. To define a child company, you will simply add to it a Parent Account.

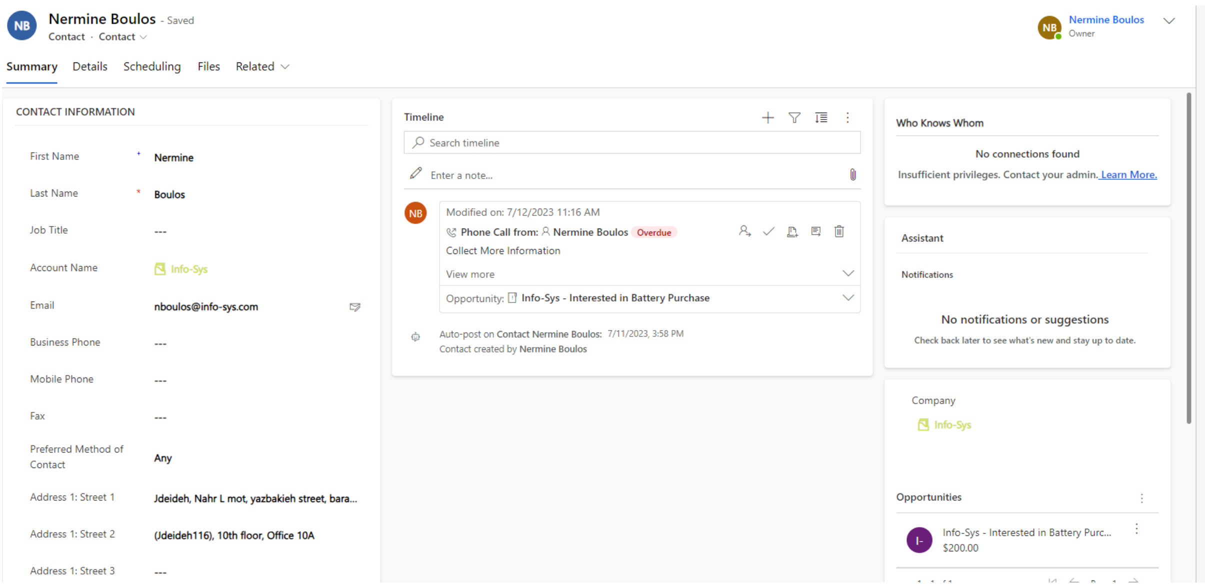


2.2 Create Contact

1. In the site map, select Contacts.



2. Specify the details that you know about the contact.



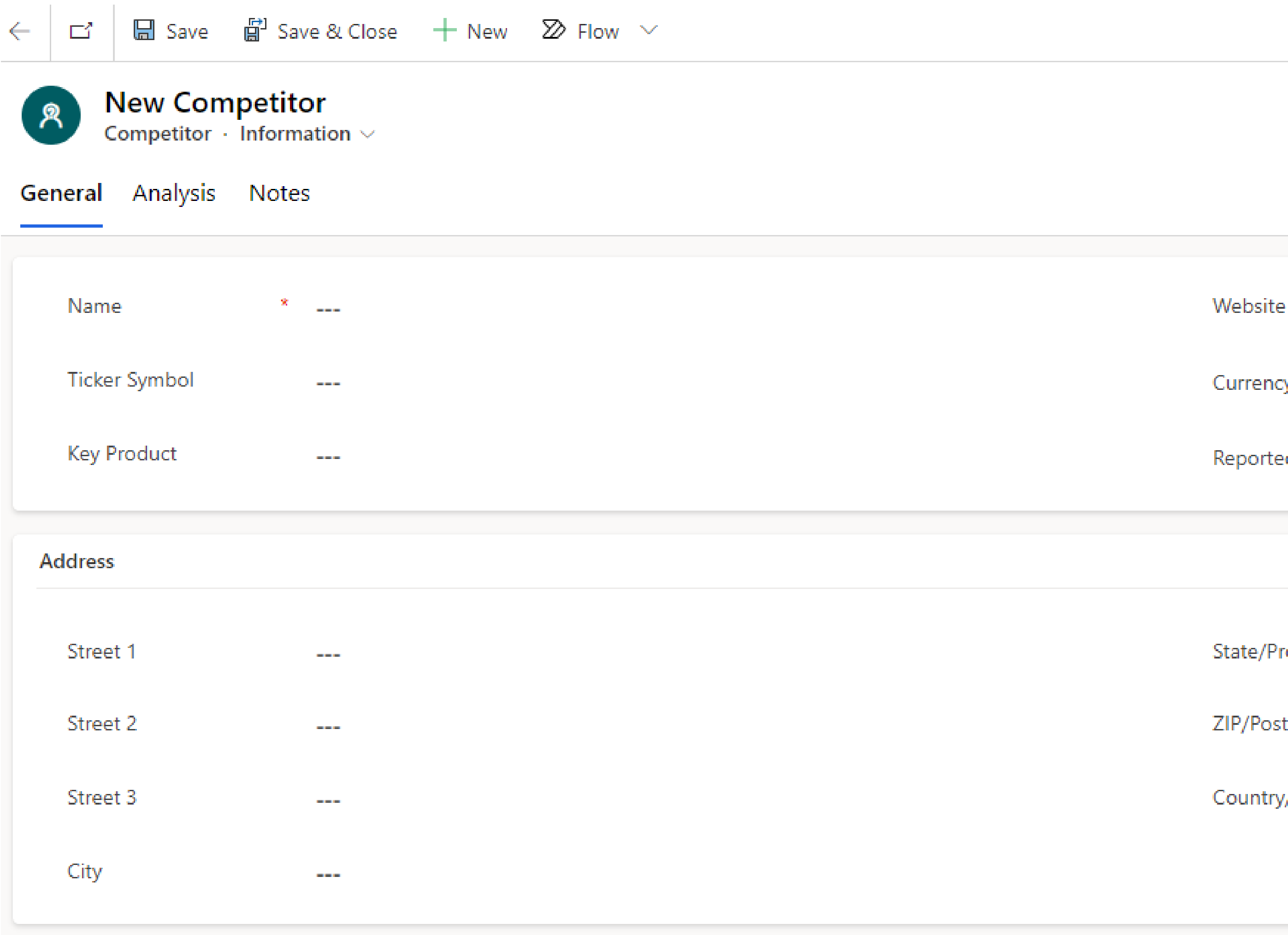
3. (Optional) Specify the account that the contact belongs to. Associating a contact with an account helps in reaching out to the right people to work with an account.

Competitors Management

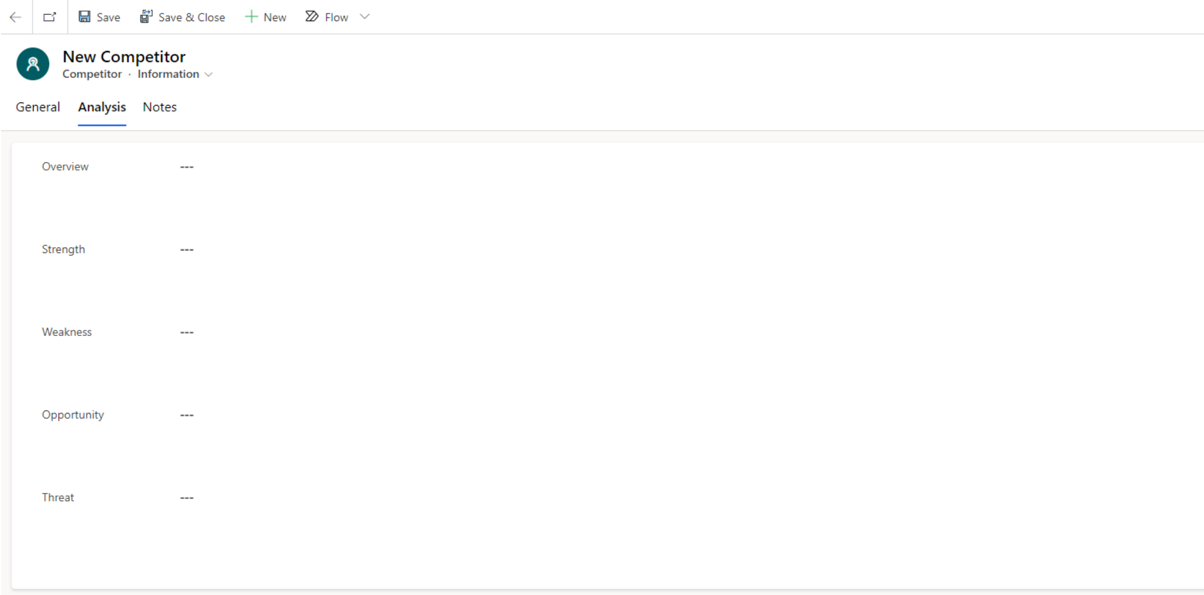
3.1 Create Competitor

1. In the site map, select Competitors.

2. On the command bar, select New.



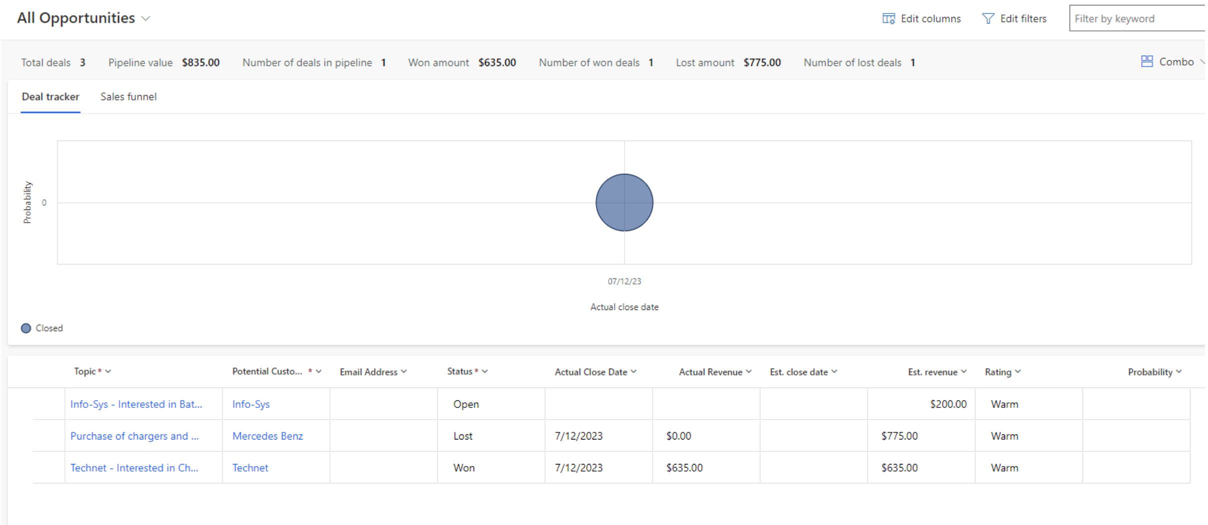
3. Fill in your information.



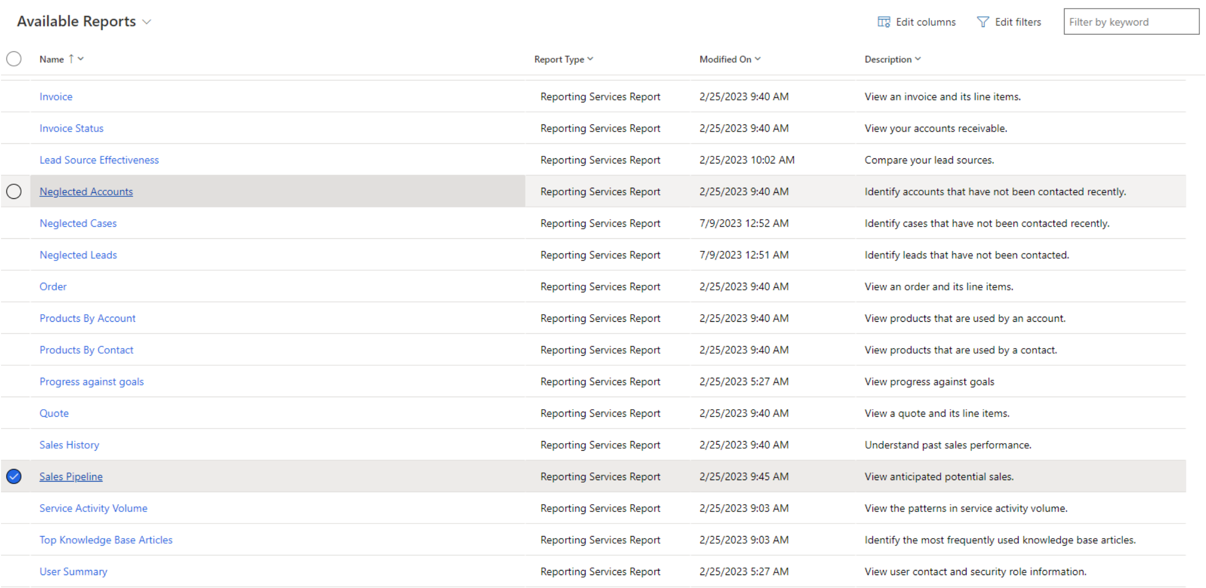
4. On the command bar, select Save.
5. To associate a competitor with an opportunity, select the Opportunities tab, and select Add Existing Opportunity. In the Search box, select the Lookup icon, and then select an opportunity from the results. Or you can add the competitor directly from the competitors' grid on the opportunity. One opportunity can have multiple competitors

Reporting, Charts & Dashboards

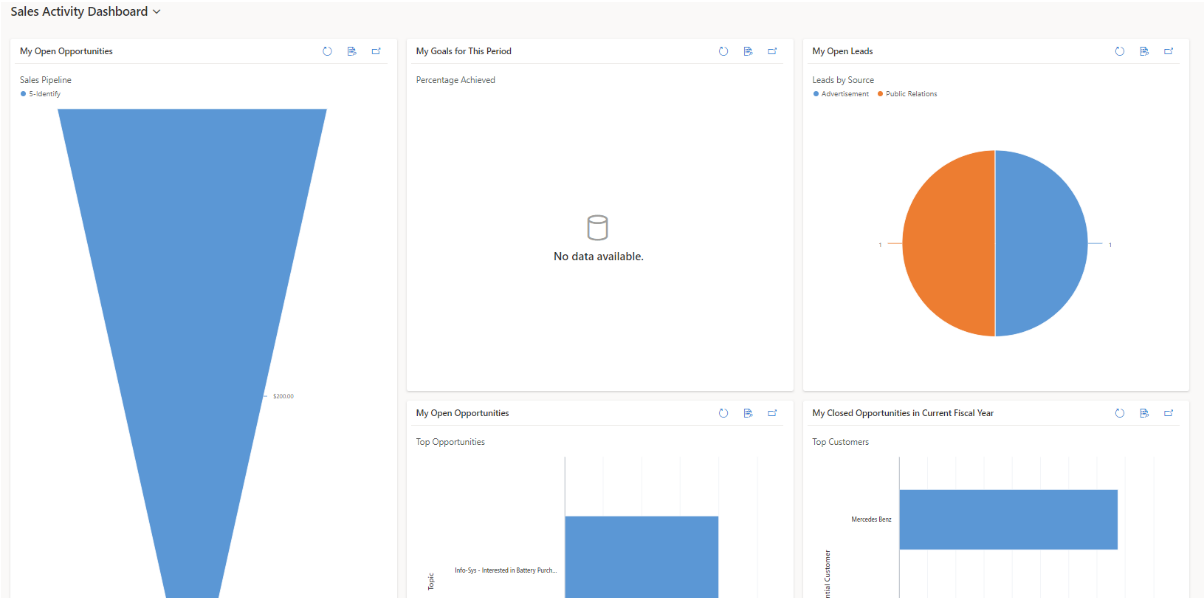
The Sales Module contains a number of reports, charts, dashboards and sales insights that are OOB.

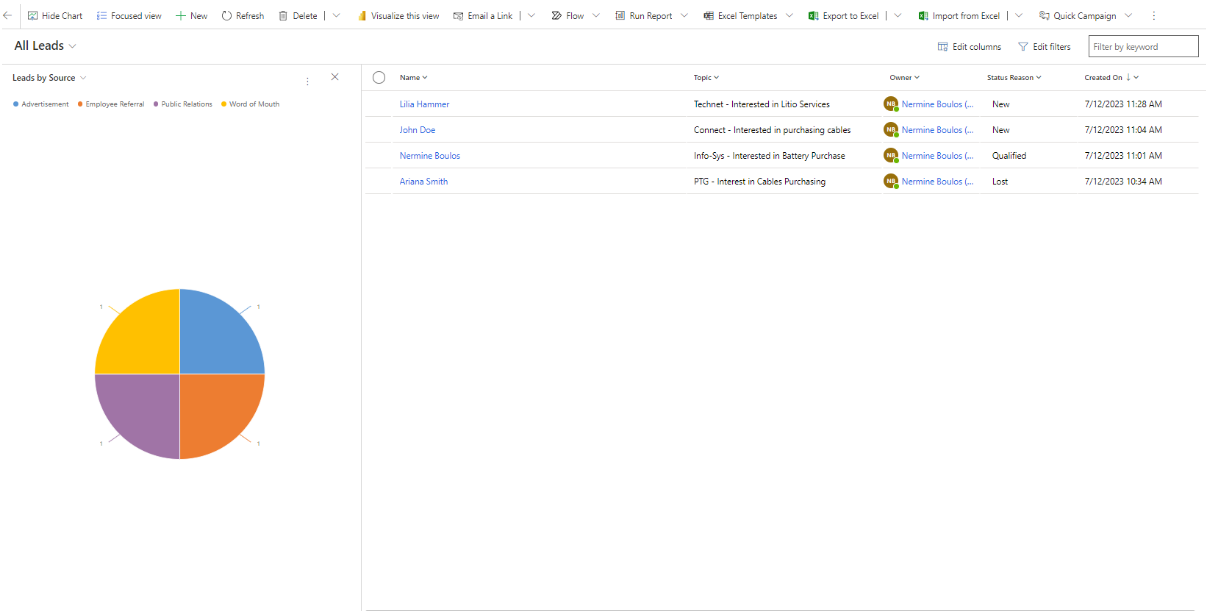


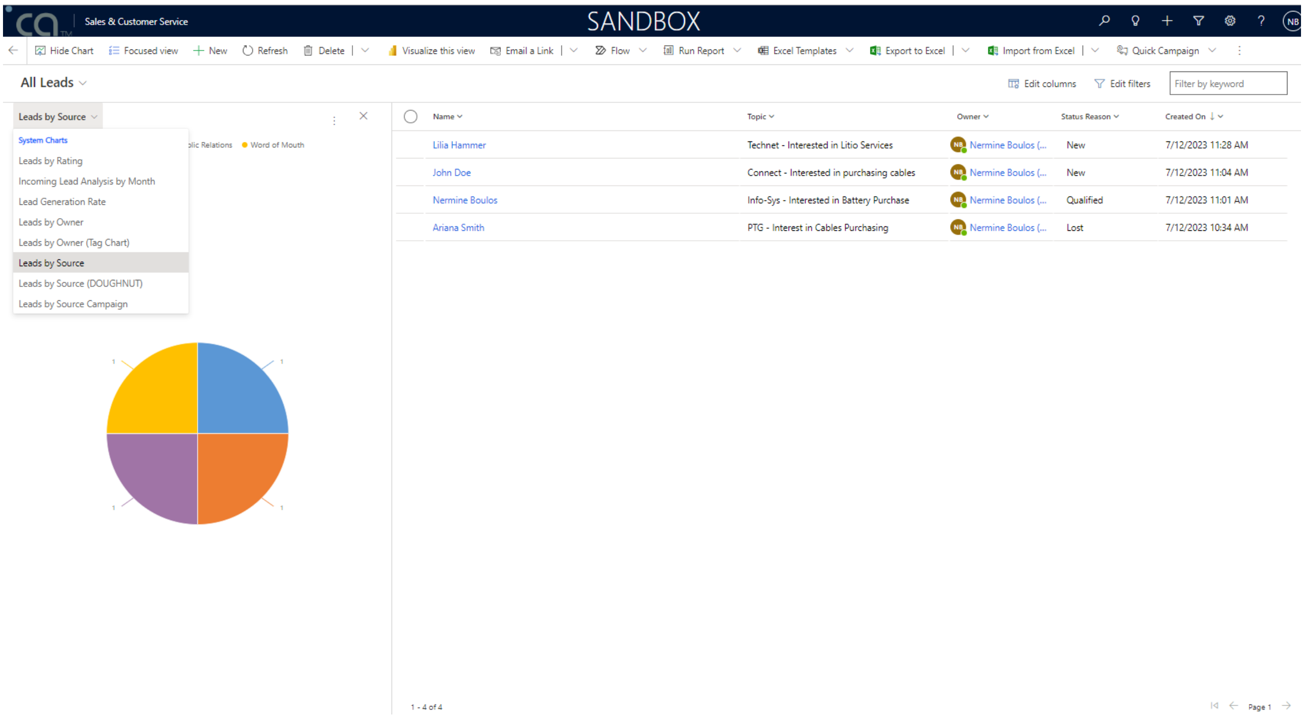
Topic *	Potential Custo... *	Email Address	Status *	Actual Close Date	Actual Revenue	Est. close date	Est. revenue	Rating	Probability
Info-Sys - Interested in Bat...	Info-Sys		Open				$200.00	Warm	
Purchase of chargers and ...	Mercedes Benz		Lost	7/12/2023	$0.00		$775.00	Warm	
Technet - Interested in Ch...	Technet		Won	7/12/2023	$635.00		$635.00	Warm	

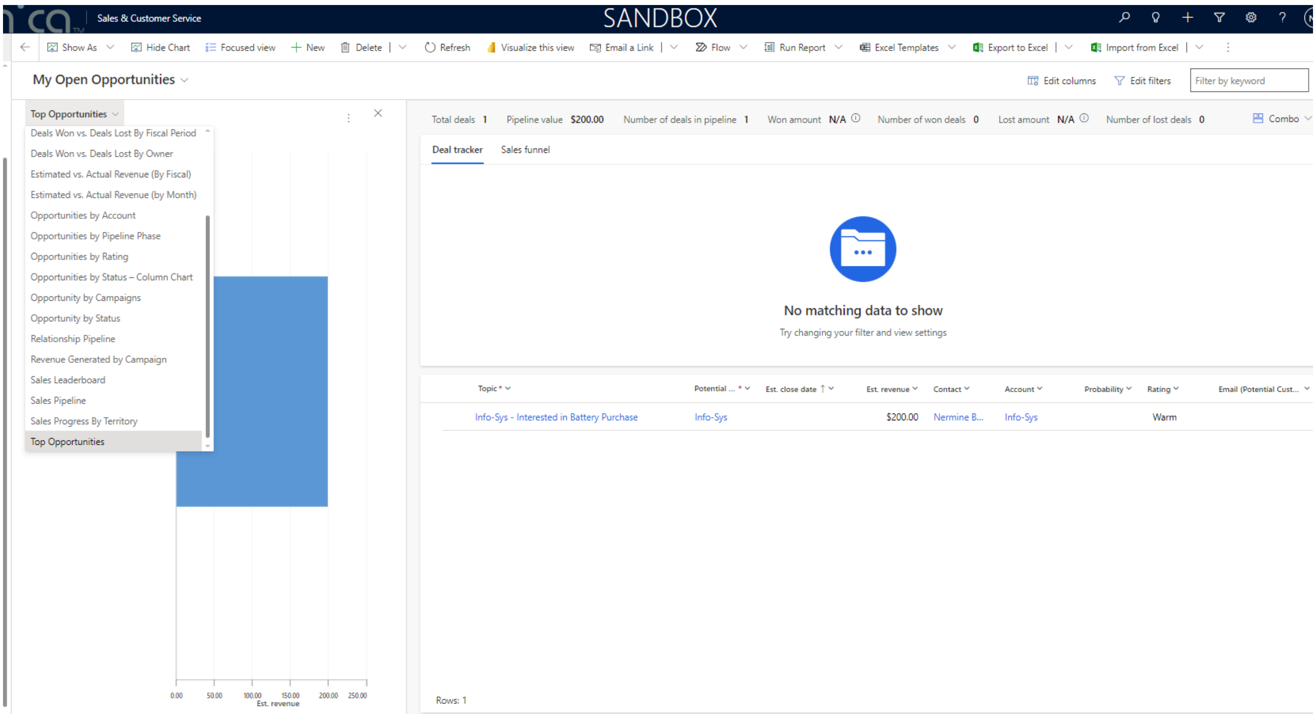


Name ↑	Report Type	Modified On	Description
Invoice	Reporting Services Report	2/25/2023 9:40 AM	View an invoice and its line items.
Invoice Status	Reporting Services Report	2/25/2023 9:40 AM	View your accounts receivable.
Lead Source Effectiveness	Reporting Services Report	2/25/2023 10:02 AM	Compare your lead sources.
Neglected Accounts	Reporting Services Report	2/25/2023 9:40 AM	Identify accounts that have not been contacted recently.
Neglected Cases	Reporting Services Report	7/9/2023 12:52 AM	Identify cases that have not been contacted recently.
Neglected Leads	Reporting Services Report	7/9/2023 12:51 AM	Identify leads that have not been contacted.
Order	Reporting Services Report	2/25/2023 9:40 AM	View an order and its line items.
Products By Account	Reporting Services Report	2/25/2023 9:40 AM	View products that are used by an account.
Products By Contact	Reporting Services Report	2/25/2023 9:40 AM	View products that are used by a contact.
Progress against goals	Reporting Services Report	2/25/2023 5:27 AM	View progress against goals
Quote	Reporting Services Report	2/25/2023 9:40 AM	View a quote and its line items.
Sales History	Reporting Services Report	2/25/2023 9:40 AM	Understand past sales performance.
Sales Pipeline	Reporting Services Report	2/25/2023 9:45 AM	View anticipated potential sales.
Service Activity Volume	Reporting Services Report	2/25/2023 9:03 AM	View the patterns in service activity volume.
Top Knowledge Base Articles	Reporting Services Report	2/25/2023 9:03 AM	Identify the most frequently used knowledge base articles.
User Summary	Reporting Services Report	2/25/2023 5:27 AM	View user contact and security role information.


Sales Activity Dashboard
My Open Opportunities
Sales Pipeline
S-Identify
$200.00
My Goals for This Period
Percentage Achieved
No data available.
My Open Leads
Leads by Source
Advertisement
Public Relations
My Open Opportunities
Top Opportunities
Info-Sys - Interested in Battery Purch...
Topic
My Closed Opportunities in Current Fiscal Year
Top Customers
Mercedes Benz


Hide Chart
Focused view
New
Refresh
Delete
Visualize this view
Email a Link
Flow
Run Report
Excel Templates
Export to Excel
Import from Excel
Quick Campaign
All Leads
Edit columns
Edit filters
Filter by keyword
Leads by Source
Advertisement
Employee Referral
Public Relations
Word of Mouth
Name
Topic
Owner
Status Reason
Created On
Lilia Hammer
Technet - Interested in Litio Services
Nermine Boulos (...
New
7/12/2023 11:28 AM
John Doe
Connect - Interested in purchasing cables
Nermine Boulos (...
New
7/12/2023 11:04 AM
Nermine Boulos
Info-Sys - Interested in Battery Purchase
Nermine Boulos (...
Qualified
7/12/2023 11:01 AM
Ariana Smith
PTG - Interest in Cables Purchasing
Nermine Boulos (...
Lost
7/12/2023 10:34 AM





Mainly needed reports will be defined Technica. Note that reports, dashboard & charts can be pre-defined and done in the backend yet D365 allows users to customize their own reports, charts and dashboards. Reports, charts and dashboards customization can be given later on during the training.

Duplicate Detection in D365

To maintain the integrity of your data, it's a good idea to have rules in place to reduce duplicate records in the system. The model-driven apps and the customer engagement apps (such as Dynamics 365 Sales and Dynamics 365 Customer Service) include default duplicate detection rules for accounts and contacts, but not for other types of records. If you want the system to detect duplicates for other record types, you'll need to create a new duplicate detection rule. Duplicate detection rules can be setup once and for all and at any point in time can be de-activated.

Synchronization with Outlook

Dynamics 365 (D365) and Outlook integration allows for seamless synchronization of data between the two platforms, enabling users to stay productive and organized. You can link various records between the two systems. For example, you can link emails, appointments, tasks, and contacts to corresponding records in Dynamics 365. Appointments and tasks created in Outlook can be synchronized with Dynamics 365, ensuring that your schedules are always up-to-date in both systems.

DOCUMENT APPROVALS

I have reviewed the information contained in this document and approved it through by sign off below:

Name	Department	Date	Signature

Comments:

Did not mention how the company/contact hierarchy will be created. Need to mention how the parent company will be created along with child companies. Also, mention that child company can be used for delivery of the project while billing should be issued to the parent company. Show the part related to different Plants/Areas within each company and how the installation of a project can be linked to a certain area/plant within each company. ➔ Added a section related to parent and child company. Billing is not handled in the CRM neither installation.

Nothing was mentioned concerning the integration between the CRM and Office product especially outlook integration. Need to explain the extent of the integration, what will be integrated exactly and how it works (updated) especially the history of each contact in terms of emails, calls, appointments etc… ➔ There is no integration to be done here. When user setup is done and user mailboxes are activated. All records in terms of emails, calls, appointments are synced to outlook.

Competitors Screen is missing from the document. Need to mention that it's a GAP and need extra customization. ➔ There is an entity for collecting competitors' data in the OOB solution so it is not a

GAP. One opportunity can have multiple competitors. A section for the competitors is added to the FRD.
Should outline the types of reports that need to be generated, and any specific requirements regarding opportunity & Pipelines that were discussed during workshop sessions. ➔ There are already OOB reports and charts existing that I added to the sections. However mainly needed reports should be specified from your side and included in the FRD. For ex. Count of opportunities by customer. I added a section for reporting. Feel free to add the reports you want to include in the scope so later on we can discuss requirements.
Preparation of the department yearly budget should be included. ➔ This part is handled in the budgeting FRD. Please note that CRM does not have Budget Control.
Why the integration with F&O is considered as a GAP? ➔ Cause the integration needs customization and also require flow development
Need to mention some important fields such as last visited date reason for rejection of trip cost of trip ➔ Added them to the related section.
Mention the detection of duplicate names. ➔ Added
Notifications on important updates were not mentioned in the document such as Won Opportunities ➔ No problem. We will mention this. Note that any notification required from your side later on can be customized even if not mentioned in the FRD as long as it does not require additional customization on entities that were not mentioned.
Nothing was mentioned concerning document attachment functionality ➔ timeline control is mentioned. Timeline control can handle attachments, general comments, and related activities (emails, calls, task, appointments…)

The specifications and conditions are hereby accepted. Info-Sys is authorized to execute the project as outlined in this document. This document is not valid until signed by the customer representative and returned to Info-Sys.

Signature: ______________________________ Date: ______________________________