

**Functional Design Document**

**FDD-*xx***

***Customization Description***

Prepared for

**[Customer Name]**

Project

**[Project Name]**

Prepared by

Name

Contributors

[Document contributors]

Date:

Version: Enter the latest version number from Change Record on the following page

Gap ID:

GAP Name:

**Revision and Signoff Sheet**

**FDD Change Record**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Author** | **Version** | **Change reference** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Client Review and Approval**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Version approved** | **Position** | **Date** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Table of Contents**

[1 Introduction 2](#_Toc358113817)

[Background 2](#_Toc358113818)

[Purpose 2](#_Toc358113819)

[FDD / Design Classification 2](#_Toc358113820)

[Audience / Stakeholders 2](#_Toc358113821)

[2 Justification 3](#_Toc358113822)

[Business Requirement 3](#_Toc358113823)

[Standard Microsoft Dynamics 3](#_Toc358113824)

[Purpose / Justification for the Modification 3](#_Toc358113825)

[Impacted Requirements 3](#_Toc358113826)

[3 Modification Description 4](#_Toc358113827)

[Business Process Flows 4](#_Toc358113828)

[Design Related Assumptions 4](#_Toc358113829)

[Requirements and Business Rules 4](#_Toc358113830)

[Integration Requirements 4](#_Toc358113831)

[Modifications to Forms / Screens 4](#_Toc358113832)

[Changes to Configuration Keys or Module Parameters 5](#_Toc358113833)

[Changes to Security Roles 5](#_Toc358113834)

[4 Error Handling 6](#_Toc358113835)

[5 Test Scripts 7](#_Toc358113836)

[6 Appendices 8](#_Toc358113837)

1. Introduction

## Background

Required: Describe the issue and how it was determined to be a Gap

## Purpose

Required: List the intended results or use for the modification; what will it help the business accomplish?

Also, describe the purpose for this document and provide a high-level overview of what this FDD contains.

## FDD / Design Classification

Required: Make choices in the grid below.

Also, describe the purpose for this document and provide a high-level overview of what this FDD contains.

|  |  |
| --- | --- |
| Design Classification | Type In Yes or No to One or More of the Lines Below |
| Creation or Modification to Dynamics Processes or Logic |  |
| Modification to Dynamics Forms / Screens |  |
| Integration |  |
| Creating or Modifying Dynamics Reports or Inquiries |  |

Table 1: FDD / Design Classification

## Audience / Stakeholders

* In a bullet point format, list the various stakeholders beginning with the customer
* Microsoft Consulting Services (MCS) Team
* Microsoft Development Team

1. Justification

## Business Requirement

Required: Restate the business requirement (i.e. Gap) here as it is described in the Business Requirements Document (BRD) and related Process Flow; clearly describe the issue and how it was determined to be a Gap

## Standard Microsoft Dynamics

Required: What are the customizations and/or parameter settings required in order for the standard Microsoft Dynamics functionality to match the Customer’s business needs? Why will these not be sufficient?

If there is a work-around available, but not acceptable, describe the workaround here and note why is was not acceptable.

Besides the set-up and / or customization requirements above, are there any ISV Solution(s) necessary to fulfil this business requirement?

## Purpose / Justification for the Modification

Optional: List any efficiencies gained, or time and / or money saved by making this modification.

## Impacted Requirements

List the Business Requirements from the BRD that are impacted by, or have an effect on, this modification.

|  |  |  |
| --- | --- | --- |
| Requirement ID | Description | Comments |
|  |  |  |
|  |  |  |
|  |  |  |

Table 1: Impacted Requirements

1. Modification Description

## Business Process Flows

Required: Explain the processes and / or requirements that need to be created or modified. Describe how you expect the new or enhanced functionality to work. This is meant for a business reader, so be sure to use business language, not technical jargon.

Optional: Use workflow diagram(s) if you feel that it helps to clarify the processes or requirement. The Developer may use these to determine the functional requirements for the technical design. Insert the Visio business process flow that this modification is a part of. Be sure the flow is modified to include this new functionality and / or sub-process. If the modification is an entirely new flow, or is a sub-process, then include that here *also*.

* Example: Sales Order Credit Checking might require two flows; (1) for the primary process that shows the Credit Checking Sub-Process imbedded in it, and (2) another flow that details the Credit Checking process itself; logic, decision points, etc.

## Design Related Assumptions

Required: The following table describes the design assumption(s) for this customization:

|  |  |
| --- | --- |
| No. | Design Assumptions |
|  |  |
|  |  |
|  |  |
|  |  |

Table 2: Design Assumptions

## Requirements and Business Rules

Required: The following table shows the key requirements and business rules required for this customization:

|  |  |  |
| --- | --- | --- |
| No. | Requirements and Business Rules | Affected Area |
|  |  |  |
|  |  |  |
|  |  |  |

Table 3: Requirements and Business Rules

## Integration Requirements

Optional: The following table shows lists all of the points of integration for this customization:

|  |  |  |
| --- | --- | --- |
| No. | Integration Requirements | Affected Area |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Table 4: Integration Requirements

## Modifications to Forms / Screens

Optional: As needed to ensure clarity, provide a mock up(s) of the screens and / or screen(s) using Excel or draw tools, etc. For each screen shoot, describe the section and / or field descriptions, data types and how many characters are needed in each new field, etc.

## Changes to Configuration Keys or Module Parameters

Optional: Detail any configuration keys that need to be changed or parameter settings that need to be modified.

## Changes to Security Roles

Required: Explain how this new functionality fits into the current security schema; what is the needed security? Does it (just) need to be included in an existing role?

If entirely new security is required, detail any new security roles, duties and / or privileges that might be needed here.

1. Error Handling

Describe any halt scenarios and the error handling method(s) needed.

Include the *exact wording* of any new messages and show / describe how and when those should be invoked and displayed.

1. Test Scripts

Describe how the modification should be tested by the *Developer* to ensure that it meets the customer’s expectations.

Include as many permutations and combinations of business rules, error handling and testing assumptions as needed to thoroughly test this customization.

For each test, be sure to end with the “expected result”; what should the *Developer* expect to see after each test is complete?

1. …
2. …
3. Appendices

Optional: Attach any needed documentation that the Customer may supply.