

**China ORP Approval Tracking system**

Business Requirements

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Version 0.1

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# Document Control

## 1.1. Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Author** | **Version** | **Version Details** |
| 27th Feb 2012 | Henry Chen | 0.1 | First Draft |
| 17th April 2012 | Jack Liu | 0.2 | Re-organize the . |
| 26th April 2012 | Chao Zhou | 0.3 | Match new requirements |
| 23th May 2012 | Chao Zhou | 0.4 | Match new requirements |
|  | | | |

## 

## 1.2. Document Distribution

### 1.2.1. Approval

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Company** | **Role** | **Sign-off By (date)** |
| Arthur Wang | Purchaser | Project Sponsor |  |
| Heidi Zheng | Purchaser |  |  |
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### 1.2.2. Review

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Company** | **Role** | **Reviewed (date)** |
| Arthur Wang | Purchaser | Project Sponsor |  |
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## 

# Summary of Requirements

* Import raw which exported from SFDC.
* To have deal opportunity info. visible to responsible stakeholders.
* Provide “approval” and “tracking” work flows.

## 2.1. Objectives

The Purchaser provides financial rebates to its reseller community. In such circumstances, visibility and transparency of the process becomes an integral part of the partner experience. However, the Purchaser has identified the following issues:

* There are no automated workflow processes. This means that delays are inherent as each step in the approvals process is signaled by emails that can be missed or ignored. Additionally, each step has be remembered and auctioned by human intervention.
* Manually reviewing and approval work flow is not clear. Email may send to wrong responsible person and cause delay on the process.
* There is no quick way for original requester to monitoring the current status for reviewing in the past with SFDC.
* There will be a big excel file to maintenance in the past and visible to all the person, maybe also including someone should not see.

In order to address these issues, the Supplier will deliver an infrastructure incorporating:

* Import raw data to COAT which exported from SFDC.
* Create workflow for approval and review process
* Notify responsible person for reviewing or data input.
* Have the data visible to right person.
* Duplicated data filtering.
* Query and report.

## 2.2. Parameters & Overview

Symantec Roles:

Channel Admin

ISO Admin

Channel Manager

Channel Director

Inside Sales

Volume Sales

Account Sales

Sales Director

COAT Roles:

Super Administrator

Channel Assigner (Channel Admin)

Sales Assigner (ISO Admin)

Channel Approver (Channel Manager)

Channel Director Approver (Channel Director)

Sales Approver (Inside Sales)

Super Visitor (Sales Director)

## 2.3. Major components list

* Logging in system
* Upload Excel files / Analyze data, Data Persistence
* Approval work flow
* Download Approved opportunity project
* Upload contract scanned files
* Rebate Payment Approval
* Administrator module

### 2.3.1 Login in system

* Logging in system
* Logging in
* Forgot password
* First login
* Change Password

Log in COAT System with user account assigned by system admin role. Someone can get a random password by email which is sent by COAT System. If he forgets the password, and he can change the password when he log in.

### 2.3.2 Upload Excel files /Analyze data, data persistence

* Upload Excel files
  1. ORP Raw Data
  2. ORP Eligible Product & Specialization Matrix
  3. Name Account Sales List
  4. Volume Sales List Name & Email
  5. Inside Sales Name & Email
  6. Enterprise Channel Manager Name& Email
  7. Standard Industry List
  8. China Region List
  9. Territory Name Account Sales & Volume Sales Name & Email List (Pending)
  10. Territory Code & Name Account Sales/Channel Sales Mapping (Pending)
  11. Executive ORP Raw Data for duplication check

Super Admin will be responsible to upload raw data to COAT.

The raw data excel content format must be regular.

All deal’s status in raw data should be “Pending Administrative Review”

* Analyze data and Persistence

1. Deal Identifier: “Deal ID” & “Product Name”

2. Validate: “ORP Type by specialization”, “Deal Size” & “Promotion” are must.

3. Duplicate Deal: Judged by “Customer Name” & “Product Name”

4. Duplicate Deal Actions:

COAT System should only warn Channel Assigner there are duplicated deals. No other action should be taken.

5. Same Deal Actions:

COAT System should update old deal and record which filed is modified and record’s status reset to “Pending Administrative Review”

6. Deal Size: Deal size is a >40K, >15K, <=15K, calculated by programming code.

7. ORP Type is decided by the first value of Partner Qualification.

8. Executive ORP Data is just for duplication check, will not affect any COAT workflow.

### 2.3.3 Approval workflow and roles

* Work Flow Chart



* Deal Approval Rule

Each Deal can have more than one product.

Each product can be approved independently.

If some products are approved, Deal Status is “Limited Approved”

* COAT System should assign deal by the rules below:

If deal size (sum Total Price) is <= 15K and one product’s ORP Type is SMB/Data Protection with BE/ Enterprise Security/Encryption, deal will be assigned to Sales Assigner.

Other deal will be assigned to Channel Assigner

If deal size is >=40K should be assigned to Channel Director Approver, after Channel Assigner approved.

* Channel Assigner Validation

Should make a selection on “China Region”

Should make a selection on Channel Approver (Channel Manager)

Should warn Assigner if there is multiply deals

* Sales Assigner Validation

Should make a selection on “China Region”

Should make a selection on Sales Approver (Inside Sales)

Should warn Assigner if there is multiply deals

* Channel Approver Validation:

Approver can only see the Deals assigned to him/her.

Approver should add comments, when “Decline” or “Escalate to Channel Director” a deal.

Approver should make a selection on “Account Sales”.

Should make a selection on “Industry”

Should send a notification mail to “Account Sales”

If deal size is >=40K should assign to Channel Director Approver

Approver can use Duplicate Deal Tool and Account Name List Tool to check is there a similar deal exists.

System should record which product is approved.

Approver can make a selection on “Account Sales” and send mail to sales. Deal’s status will be changed to “Pending for Sales Confirmation”.

* Sales Approver Validation

Approver can only see the Deals assigned to him/her.

Should add comment when “Decline”

Approver should make a selection on “Volume Sales”.

Should make a selection on “Industry”

Should send a notification mail to “Volume Sales”

Approver can use Duplicate Deal Tool and Account Name List Tool to check is there a similar deal exists

System should record which product is approved

* Channel Director Approver

Should send a notification mail to “Channel Manager” and “Account Sales”

* Sales Director View

Just view ORP Status

### 2.3.4 Download Approval opportunity project

* Filter Criteria:

|  |  |  |  |
| --- | --- | --- | --- |
| **ORP Type** | | Solution Specialization ORP | |
|  | | Distribution Specialization ORP | |
|  | | SMB Specialization ORP | |
|  | | All Specialization ORP | |
|  | |  | |
| **China Region** | | China North | |
|  | | China East | |
|  | | China South | |
|  | | China West | |
|  | |  | |
|  | |  | |
| **COAT Status** | | All | |
|  | | New | |
|  | | On Progress | |
|  | | Completed, Approved | |
|  | | Completed, Declined | |
|  | |  | |
| **SFDC Status** | | All | |
|  | | Pending | |
|  | | No Status | |
|  | | Approved | |
|  | | Limited Approved | |
|  | | Rejected | |
|  | | Lost | |
|  | | Closed | |
|  | | Expired | |
|  | | Resubmit | |
|  | | Pending Administrative Review | |
|  | |  | |
| **CAM Name** | | Drop Down List for CAM | |
| **Sales Name** | | Drop Down List for Sales | |
| **Search by Customer Name** | |  | |
| **Search by Period** | from | | date | | to | date |
| **Search by Approve Date** | from | | date | | to | date |

* **What kind of output is needed?**

Excel file, Detail workflow information

### 2.3.5 System Tools

1. Mail Tool

Send pending deals notification to Channel Approver and Sales Approver daily. Should set up “>7 days” and “>14 days” alert in mail.

Send pending deals notification to Channel Director Approver on every Thursday. Should set up “>7 days” and “>14 days” alert in mail

2. Duplication Check Tool

It’s a key word searching tool. Approver can use this tool to check. If the result is more than five records, system should show nothing and notice approver to use another key words.

Data source: Executive ORP Report

3. Name Account List Check Tool

It’s a key word searching tool. Approver can use this tool to check.

Data source: Name account List

### 2.3.6 Upload scanned files for contract

* Channel Approver (Channel Manager) and Sales Approver (Inside Sales) upload contracts to COAT.
* Contracts can be relative to a deal at any time.
* Approver can update contracts, but old contracts should be saved in COAT.

### 2.3.7 Rebate Payment Approval

* **Show Status paid or not**

Create another new page, show the rebate payment approval status of the opportunities data according to another raw data, if the another raw data have the data in database, so this status is “paid”, otherwise, “no paid”.

### 2.3.8 Admin module

* **User Account**

Create / Update / Delete User, include search function by criteria.

Update User’s Role

* **Upload Excel**

See 2.3.2

* **Approval**

Can do all operation and see all Deal