# COAT Questions

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Date: 2012-04-16

## Q: Which Fields of a Deal Record should be or not shown for different role?

**S**: show

**H**: hide

Fields:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Filed Name** | *ORP Team* | *ISO Admin* | *Sales Operation* | *Inside Sales* | *Channel Manager* | *Sales Team* | *Channel Director* |
| Deal ID |  |  |  |  |  |  |  |
| End User Company |  |  |  |  |  |  |  |
| End User Company (EN) |  |  |  |  |  |  |  |
| Country |  |  |  |  |  |  |  |
| Province |  |  |  |  |  |  |  |
| Industry -1 (Raw Data) |  |  |  |  |  |  |  |
| Industry-2 (Assign by Sammy/Emily) |  |  |  |  |  |  |  |
| Province (Assigned by Sammy/Emily) |  |  |  |  |  |  |  |
| Opportunity Project Name |  |  |  |  |  |  |  |
| Partner Name |  |  |  |  |  |  |  |
| Partner Type |  |  |  |  |  |  |  |
| Opportunity Owner (Partner Contact) |  |  |  |  |  |  |  |
| Contact Information |  |  |  |  |  |  |  |
| Product Name |  |  |  |  |  |  |  |
| Total Price (USD) |  |  |  |  |  |  |  |
| Solution ORP Deal Size |  |  |  |  |  |  |  |
| ORP Type |  |  |  |  |  |  |  |
| Sales Operation / ISO Admin |  |  |  |  |  |  |  |
| Emily & Sammy/Winnie Action Date |  |  |  |  |  |  |  |
| Insides Sales / Channel Manager |  |  |  |  |  |  |  |
| CAM/ISO Action Date |  |  |  |  |  |  |  |
| Sales Team |  |  |  |  |  |  |  |
| Sales Action Date |  |  |  |  |  |  |  |
| Channel Director |  |  |  |  |  |  |  |
| Channel Director Action Date |  |  |  |  |  |  |  |
| Deal Validation Result |  |  |  |  |  |  |  |
| Contract Received |  |  |  |  |  |  |  |
| Rebate Payment Approval |  |  |  |  |  |  |  |

## Q: After ORP Team Approve a Deal, Should we send an email to Sales Operation and ISO Admin? (This is not mentioned before).

## Q: In old requirement document, it mentions that the deal should be assigned to Name Acount Sales after Insides Sales / Channel Manager Approval. What is Name Account there?

## Q: In the output structure, there is a field called COAT STATUS. It has different values. But, it misses a status for the deal before JO validate. Should we call it “New”?

COAT Status: “On Progress”,” Completed, Approved”,” Completed, Declined”,” “Approve”, “Reject”

## Q: The “COAT STATUS”’s value “Reject” mean (Item 5 showing "Completed, Declined" base the judgment that either Item 2 or 3 with "Reject" or "Not Accept" comments). Can you sure that all users will enter “Reject” and “Not Accept” in comment?

## Q: “Channel Manager can upload Contract files, can’t delete these files, but can cover these” It that means the old contact files will be saved in server?

## Q: One Deal has only one contract file or more?

## Q: “show the rebate payment approval status of the opportunities data according to another raw data”. What is another raw data? Can you provide it?

## Q: One user should have one role or more?

## Q: What the answer should be input by Sales Team? (Input a text?)

|  |  |
| --- | --- |
| **Major Industry** | **Industry** |
| FSI | Banking & Finance |
| Government | Government Public |
| Telco | Telecommunications |
| Others | Manufacturing |
| Others | Other |
| Others | Academic: College/University |
| Others | Real Estate |
| Others | Communication & Media |
| Others | Healthcare |
| Others | Retail |
| Others | Insurance |

## Q: Should be “Major Industry”-“Industry” or “Industry” in COAT

## Q: Can an Industry become a Major Industry one day?

## Q: Could one Inside Sales have more than one Industry?