Requirement collecting

# Stakeholder relationship

## APJ ORP Team

Team’s role in COAT?

What they will need input to COAT:?

What they will expect to get from COAT?

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| Name | Role | Submit | Approval | Approval2 | TBD | TBD |
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**Sales Operation / ISO Admin**Team’s role in COAT:?  
Assign opportunity to Insides Sales & Channel Manager

What they will need input to COAT:?  
Select Insides Sales & Channel Manager  
Select Industry-2  
Input Province

What they will expect to get from COAT?  
Opportunity list view.

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| --- | --- | --- | --- | --- | --- | --- |
| Name | Role | Submit | Approval | Approval2 | TBD | TBD |
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## Inside Sales (Sample name)/Channel Sales (Same Name, please make clear the property of channel sales)

Role in COAT:?  
Declined or Holding-double check with sales/Partner or Approved, with comments. If "Approved" or "Holding-double check ", assign to Named Account Sales (Sales List)

What they will need input to COAT:?  
Update status of opportunity with comments and assign to named account sales

What they will expect to get from COAT?  
Opportunity list view

Channel Mapping List ? How to get it? Who will maintains it?  
Provide by Heidi. System admin will maintains it in COAT.

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| --- | --- | --- | --- | --- | --- | --- |
| Name | Role | Submit | Approval | Approval2 | Region1 | TBD |
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## Commercial Sales/Name Account Sales

Role in COAT:?  
Accept or Not Accept with Comments, Complete Question List

What they will need input to COAT:?  
Update status of opportunity.  
>40K ,additional approval step 4, must final approved by Channel Director.

What they will expect to get from COAT?  
Opportunity list view

Channel Mapping List ? How to get it? Who will maintains it?  
Provide by Heidi. System admin will maintains it in COAT.

**Channel Director**Role in COAT:?  
Accept or Not Accept opportunity

What they will need input to COAT:?  
Update status of opportunity.

What they will expect to get from COAT?  
Opportunity list view

Channel Mapping List ? How to get it? Who will maintains it?  
Provide by Heidi. System admin will maintains it in COAT.

# SFDC workflow?

SFDC input:

Who input data into SFDC?  
Partner

What kind of information will be inputted into SFDC?  
Refer raw data file

Sample file and data  
Refer raw data file

SFDC output:

Who will need get data from SFDC?  
Joseph

What kind of information will be collected from SFDC and updated into COAT?  
ORP Type

Sample file or data?  
Refer raw data file

SFDC relation with COAT?  
SFDC provided raw data for COAT

# COAT new case submit process

## Input:

Who will input new case into COAT?

Joseph

What kind of data will need to be filled for new case?

Refer the raw data file from SFDC.

### Category:

#### ORP type: (Who will decide what kind of ORP type, case assigner?)

Solution Specialization ORP

Distribution Specialization ORP

SMB Specialization ORP

All Specialization ORP

#### Deal ID:

This will need to get from SFDC.

C column of raw data

Partner Name: How to define partner name. How to avoid same company have different Name. Example: 中国移动通信公司，中移动，CMCC, China mobile. They all mean same company.

It’s a company name from raw data.  
S column in raw data

Opportunity Owner: Is this a company name? or this is person name of partner company.

It’s a personal name of partner company.  
T column in raw data

Contact information: phone number or mobile? Also just leave 100 word string. Can be filled with any information?

pending

End User Company: Company Name.

It’s a company name from raw data.  
F column

End User Company(English)  
G column

If G is not null, read G column  
else read F column

Country: CHN/JPN/KNR….. format? Or P.R.China /Japan/Korea/…… Please confirm your design.

Read from raw data.

#### Region:

China:

China North

China East

China South

China West

Taiwan

Hong Kong

Province: Will pre-define province information which can be selected after user selected Country information. Do you have a province list already?

Need to pre-define province information

What about city? No need for city info?  
No city info.

Industry: This column will leave blank for submitter to fill. If there is a list already, we can make it pre-define.

Need a dropdown list to select for Industry-2.

Industry -1 (From Raw Data)  
Industry-2 (Assign by Sammy/Emily)

Product Name: select. Need prepare a product list which can be used for selecting.

Read from raw data

#### Deal Size:

>40K, >15K, >10K, <10K, <3K

Any time or SFDC information need to be filled?

# Case assign process

Role and responsibility:

## SMB ORP assigned by Emily & Winnie: ISO Sales ,Solution & Dist. ORP assigned by Sammy to Channel Managers , Auto Assignment Notification email sending to inside sales & Channel Manager

## Category:

#### Assign ORP type

Solution Specialization ORP  
 Distribution Specialization ORP  
 SMB Specialization ORP  
 All Specialization ORP

Assign to ???? How to do with this part. (Name list?)  
Joseph select ORP type in Raw Data Validation Page

CAM(CAM list. Is this same as about Assign to item?)

# Approval process

Who will be approver?

Sales Operation / ISO Admin

Insides Sales / Channel Manager

Sales Team

Channel Director

Approval workflow:

Joseph input opportunity to COAT.  
Joseph Select ORP type in Raw Data Validation Page

Sales Operation / ISO Admin:  
1, Input province info.  
2,SMB ORP assigned by Emily & Winnie: ISO Sales ,Solution & Dist. ORP assigned by Sammy to Channel Managers , Auto Assignment Notification email sending to inside sales & Channel Manager

Insides Sales / Channel Manager:  
Declined or Holding-double check with sales/Partner or Approved, with comments. If "Approved" or "Holding-double check ", assign to Named Account Sales (Sales List)

Sales Team:  
Accept or Not Accept with Comments, Complete Question List , notification email send to CAM/ISO and cc copy Sales Team Leader and him selves.

Channel Director:  
>40K ,additional approval step 4, must final approved by Channel Director.

Detail information and document??????

# Output

**Who can get output information?**

Sales Operation / ISO Admin

Insides Sales / Channel Manager

Sales Team

Channel Director

**What kind of output is needed?**

Excel file

# Searching function

ORP Type  
China Region  
COAT Status  
SFDC Status  
CAM Name  
Sales Name  
Deal ID  
Customer Name (fuzzy search)  
Period

# UI

## English UI

Yes

## Supported Browser

IE7,IE8 and IE9

# Working environment network

Inside the Symantec domain, Can’t access from external internet.