ttec®
DIGITAL

Functional Requirements: Customer Insights –
Journeys (CIJ) Application

PBF Energy

CX Optimized

Table of Contents

Document Purpose

This functional requirement document describes application related changes required to meet the desired business requirements as they relate to the application identified for deployment.

This list of requirements approved will be considered final upon acceptance as indicated by the customer's signature.

Version History

Version	Author	Date	Notes
1.0	Stuti Mehta	8/16/2024	Initial Draft
1.1	Stuti Mehta	8/19/2024 – 8/23/2024	Added details under all the sections
1.3	Stuti Mehta	8/26/2024	Final Review and Updates

Project Overview

PBF Energy is engaging TTEC Digital to implement Customer Insights – Journeys as the tool to meet the requirements of the marketing team. Additionally, TTEC will provide setup and training for future expansion of the marketing module (Customer Insights - Journeys).

Project Objectives

Customer Insights - Journeys in-scope summary for Build phase

- Baseline application settings/Environment setup
- Configuration of 2 Segments
- Configuration of 1 native trigger
- Configuration of 2 Email Templates
- Configuration of up to 3 journeys
- Email and Phone Consent Management and Preference Center
- Configuration of 2 Marketing security roles (1 Admin ,1 General user)
- Schema updates as needed on Account, Contact, Case or other entity for new customer journeys
- SharePoint Document Management
- User Training
- Power BI Report Updates

Customer Insights – Journeys (CIJ) Functional Requirements

1. Baseline System Configuration

A domain will be authenticated in PBF Energy's Customer Insights – Journeys application for the purpose of sending emails. The domain is pbfenergy.com. TTEC Digital will provide the authentication keys for PBF Energy to share with their DNS provider.

Microsoft Documentation for reference - https://learn.microsoft.com/en-us/dynamics365/customer-insights/journeys/domain-authentication

2. Data Schema Updates

TTEC Digital will add new fields to any out of the box Dataverse tables as needed to be able to create the segments for the terminal notification customer journeys. No new fields have been identified so far during the discovery phase and there is going to be a separate change order to bring the RightAngle data into PBF Energy's Dataverse.

3. Configuration of 2 Email Templates

The following 2 email templates will be configured in PBF Energy's Customer Insights – Journeys environment. PBF Energy team will be trained to create additional emails as needed.

S. No	Emails	Notes
1.	Terminal Notification - Downtime	This email template will be created based on the template shared by PBF Energy team.
2.	Terminal Notification - Uptime	This email template will be created based on the template shared by PBF Energy team.

The from and reply-to address for the emails is ecmarketing@pbfenergy.com

4. Configuration of 2 Segments in Customer Insights – Journeys

TTEC Digital will configure the following segments as part of this implementation and will train the PBF Energy team to create additional segments as needed.

S. No	Segments	Notes
1.	A Location and Product based segment for terminal notifications	This dynamic segment will be created querying the Contact and related tables for the purpose of sending out terminal notifications for the affected product at a specific location.
2.	Another Location and Product based segment for terminal notifications	This dynamic segment will be created querying the Contact and related tables for the purpose of sending out terminal notifications for the affected product at a specific location.

5. Configuration of 2 Journeys in Customer Insights - Journeys

TTEC Digital will configure the following journeys as part of this implementation and will train PBF Energy team to create additional journeys as needed.

S. No	Journeys
1.	Downtime Notice
2.	Uptime Notice

6. Consent Management and Preference Center form in Customer Insights - Journeys

TTEC Digital will create a compliance profile and configure the preference center/unsubscribe form to allow contacts to unsubscribe or to manage their preferences. This unsubscribe URL will be used in all of PBF Energy's marketing emails except for the ones that do not require consent.

TTEC Digital will do a one-time import of consent data for all existing marketing contacts and will create a Power Automate to create a consent record for each marketing contact imported into the Dataverse environment. The consent will be created for emails and mobile phone for commercial purpose under PBF Energy's default compliance profile.

A service account will need to be created by PBF Energy's IT team to run the Power Automate flow. The service account will need a premium license assigned to it.

7. Email Form Updates

TTEC Digital will create a new form on the native Email table. This new form will be used by the Marketing team. Security will be enabled on this form to be set as the default for the Marketing team. A JavaScript will be added to the new Email form to set the default from email address to ecmarketing@pbfenergy.com on load of the new custom Email form. Users will be able to clear the from email address field to allow them to select a different email address/contact/queue to send the email.

8. SharePoint Integration for Document Management

TTEC Digital will enable server-based SharePoint integration with PBF Energy's production Dataverse environment. PBF Energy will provide the SharePoint site information to TTEC Digital. A new SharePoint site may need to be created for PBF Energy's Marketing team. With this integration for document management, PBF Energy's Marketing team will be able to upload document to SharePoint from within the Customer Insights – Journeys application.

9. Power BI Report Updates

TTEC Digital will update 3 existing Power BI reports to link them to the related Account records in PBF Energy's production Dataverse environment. PBF Energy would like to see the report data at the Account level so a new tab will be added to the Account table form and the reports will be added to that new tab.

10.   Configuration of Marketing Security Roles

Role Name	Access Needed
Marketing Professional-Business	This user level role will allow users to create/update/manage their own marketing records like emails, segments, templates etc. Detailed security permissions will be discussed during the build phase.
Marketing Manager-Business	This admin level role will allow users to create/update/manage/delete any marketing records like emails, segments, templates etc. Detailed security permissions will be discussed during the build phase.

Marketing Professional/User:

	Create	Read	Write	Append	Append To	Delete	Assign
Journey	Organization	Organization	User	Organization	Organization	User	User
Content Blocks	Organization	Organization	User	Organization	Organization	User	User
Email	Organization	Organization	User	Organization	Organization	User	User
Email Templates	Organization	Organization	User	Organization	Organization	User	User
Files/Assets (images etc.)	Organization	Organization	User	Organization	Organization	User	User
Preference Center	None	Organization	None	Organization	Organization	None	None
Contact	Organization	Organization	User	Organization	Organization	None	User
Segment	Organization	Organization	User	Organization	Organization	User	User

Marketing Manager/Admin:

Append and Append To permissions will be at the Organization level for the following tables.

	Create	Read	Write	Delete	Assign
Journey	Organization	Organization	Organization	Organization	Organization
Content Blocks	Organization	Organization	Organization	Organization	Organization

Email	Organization	Organization	Organization	Organization	Organization
Email Templates	Organization	Organization	Organization	Organization	Organization
Files/Assets (images etc.)	Organization	Organization	Organization	Organization	Organization
Preference Center	Organization	Organization	Organization	Organization	Organization
Contact	Organization	Organization	Organization	None	Organization
Segment	Organization	Organization	Organization	Organization	Organization

11.   User Training

TTEC Digital will provide training to PBF Energy's Marketing team on the following topics:

1. Individual user settings in the application, syncing tasks, contacts, task reminders etc.
2. Creating emails
3. Creating segments
4. Creating segment based and native trigger-based journeys
5. Managing preference center form and consent management
6. Using SharePoint within the Customer Insights – Journeys application to upload documents related to Accounts.

Customer Approval

PBF Energy agrees with all the requirements for the Customer Insights – Journeys application presented above.

PBF Energy   **TTEC Digital, LLC**

Name: _____   Name: _____

Title: _____   Title: _____

Date: _____   Date: _____