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29/01/2010

**Product Requirements Document**

**Prospect Manager**

**Kevin Horlock**

**Version**

# Revision and Signoff Sheet

## Revision

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Author | Version | Change Reference |
| 18th Nov 2009 | K Horlock | 0.1 | Initial Draft |
| 23rd Nov 2009 | K Horlock | 0.2 | Incorporated Mark Rokes observations |
| 30th Nov 2009 | K Horlock | 0.3 | Incorporated Simon Stronachs observations |
| 02nd Dec 2009 | K Horlock | 0.4 | Incorporated account managers and Colin Scott feedback/observations |
| 13th Jan 2010 | K Horlock | 0.5 | Incorporated rework from Dev review and new features from Paul Sparkes |
| 14th Jan 2010 | K Horlock | 0.6 | Incorporated clarification that opportunities are a distinctly new transaction type and not SQU/PQU’s |
| 29th Jan 2010 | K Horlock | 0.7 | Incorporated clarifications and adjustments following review with MR, TR, PR, MH |

## Reviewers

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Position | Version Approved | Date |
| M Higginson | Software Technology Manager |  |  |
| C Sandow | Analyst Programmer |  |  |
| T Roberts | QA Technician |  |  |
| M Roke | Release Product Manager |  |  |
| D Rustell | QA Manager |  |  |
| S Stronach | Sales – Functional Reviewer |  |  |
| C Scott | Sales – Functional Reviewer |  |  |

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# Purpose of Document

The purpose of the Product Requirements Document (PRD)

1. To sufficiently define the product requirements based on initial business analysis of the MRD to allow for further detailed analysis and facilitate the definition of a high level design (HLD) document.

# SDLC Checkpoints That Must Be Covered

The Product Requirements Document (PRD) is part of the planning stage of the project. The planning stage of the project seeks to pass the following check points. The checkpoints that should be contained in this document are indicated in the table below.

|  |  |  |
| --- | --- | --- |
| Id | Description | In Document |
| P1/P2 | Complete Business Analysis Per Requirement  (P1, P2) | Product Requirements Document |

# PRD Instructions

*This document should use the Marketing Requirements Document (MRD) as it’s input. Each requirement from the MRD should*

* *Have Business Analysis Performed on it*

# Marketing Requirements Scope



Note:

For the purpose of this PRD, some of the requirements listed in the MRD and been further subdivided.

|  |  |  |
| --- | --- | --- |
| *MRD Requirement* | *PRD Requirement* | *Summary* |
| *6.3.Pro.42* | *6.3.Pro.42.a* | *Focuses on Trader List tab and its iterations* |
| *6.3.Pro.42* | *6.3.Pro.42.b* | *Focuses on the Prospect Record* |
| *6.3.Pro.42* | *6.3.Pro.42.c* | *Identifies that licensing is required* |
| *6.3.Pro.42* | *6.3.Pro.42.d* | *User security rights* |
| *6.3.Pro.42* | *6.3.Pro.42.e* | *User defined fields* |

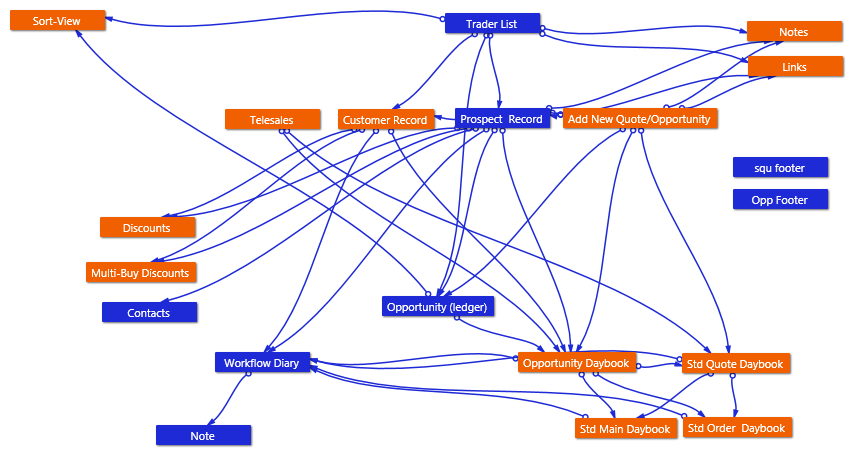
# User Profiles

A matrix of the typical types of users for the Prospect manager functionality is outlined below.

**

# Requirements – Screen Map

The screen map below highlights the interactions of the new screens to the existing of IRIS Exchequer.



***Key****:*

*Blue: New or existing screens that modified*

*Orange: Interactions with standard screens*

### Requirement Name and Number : Prospect Tab/6.3.PRO.42.a

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.42 from the MRD.*

#### Use case

##### Overview

The existing Trader list for IRIS Exchequer will now include an additional Tabs titled “Prospects” and “Supplier Prospects”. These new Tabs will list all Prospective Customer/Suppliers for the active IRIS Exchequer company

Actors

Any Standard IRIS Exchequer user (especially those profiled) who has their user profile menu options enabled for “Prospect Details - Access to”

Scenarios

* The user shall select the appropriate Prospects tab when there is a need to view the detail of a Prospect record.
* The user shall select the appropriate Prospect tab prior to selecting any of the menu options Find, Add, Edit, Sort View, Quotes, Links, Notes, Print, Convert, Close in respect of a Prospect record.
* The user shall select the appropriate Prospect tab prior to using the ObjectCreditController dialog for the information to be relevant to a Prospect record.
* The user shall select the appropriate Prospect tab prior to using the ObjectPriceLookup Dialog for the information to be relevant to a Prospect record.

##### 

#### Licensing Considerations

The Prospect Tab won’t be available unless a new valid 30 or full license has been released for the Prospect manager. Should a 30 day license expire, the data will just sit hidden in the tables, and won’t be directly accessible again until the license is renewed.

#### User interface changes

#### 

The above is a mock-up of the new Trader list only.

#### Open Issues/Assumptions

* Prospects icons on IRIS Exchequer Toolbar for Prospective Customers Prospective Suppliers
* Short-cuts keys will be **Shift-F2** for Prospective Customers – this will open the Trader list Prospect tab, **Shift-F3** for Prospective Suppliers – this will open the Trader list Supplier Prospects Tab
* For the purposes of the processes below, functional behaviour is the same for both “Prospects” and “Supplier Prospects” and hence are referred to as prospect records below.
* The above mock up includes the columns
  + AC Code – Prospect account code
  + Company – Prospect Company name
  + Opportunity – the NETT sum of all associated Prospect quotations for the record. The value is represented in the base currency of the company.
  + Contact – Prospect main contact
  + Tel – Prospect main contact’s telephone number
* Selecting the **Close** button, will Close the Trader List dialog
* Selecting the **Add** button, will open the new Prospect record in front of the Trader list
* Selecting the **Edit** button, will open the highlighted prospect record in front of the Trader list
* Selecting the **Find** button will present the user the options to search by:
  + Account Code
  + Alternative Search Code
  + Company name
  + Contact
* Selecting the **Sort View** button will present the user the same options as selecting the Sort view for Customers or Suppliers via the Trader list.
* Selecting the Quotes button, will open the highlighted prospect quotation ledger
* Selecting the **Links** option would open the standard IRIS Exchequer links dialog
* Selecting the **Notes** option, would open the standard IRIS Exchequer notes tab
* Selecting the **print** option, would instigate the paperless dialog for printing/e-mailing/faxing the Prospect record (6.3.PRO.46)
* Selecting the **convert** option, would enable the user to move the Prospect record from the Prospects table to either the Customer or Supplier Records. When the convert option has been selected, the user would be presented with a dialog that:
  + Confirms the new Customer or Supplier account code. The Prospect account code is going to be different to a Customer or Supplier account code. Therefore at the point of conversion the proposed Account code needs to be confirmed to the user (following the normal/standard approach used by IRIS Exchequer for sales/purchase ledger account codes)

In addition, once the convert has been completed the following actions would also be instigated:

* + - Any Prospective opportunities associated with what was the Prospect record have their account code changed to the new Sales or Purchase account code. In addition any associated transactions will be converted to SQU’s or PQU’s as appropriate.
    - The new Customer/Supplier record has a dated note inserted that states:
      * This account was created from Prospect record : XXXXXX by {username}
  + Within the above dialog for account code confirmation, a tick box is present that states “Open Customer record for editing next?”. If ticked the Customer record dialog is opened in edit mode. The equivalent would be applied for Suppliers.
* The **delete** option will not only remove the Prospect record, but also any opportunities, discounts, notes, links, multi-discount records associated with the Prospect record.
* The ObjectCreditController will be associated to the Prospect Record by:
  + Dialog Title Set to the Prospect Company name
  + A/c Code Set to the Prospect account code
  + Avg D/Days Set to zero
  + Oldest debt days Set to zero
  + Credit limit Set to zero
  + Balance Net sum of all opportunities for the prospect
  + Committed Set to zero

(orders O/S. Del notes O/S)

* + Credit available Set to zero
  + Age debt as at Set to zero
  + Age by months set by user
  + Interval X month set by user
  + Aging currency set by user
  + Txlate to set by user
  + Last paid date Set to a blank date
  + Current Quotations for the prospect against aging settings
  + 1 month Quotations for the prospect against aging settings
  + 2 months Quotations for the prospect against aging settings
  + 3 months Quotations for the prospect against aging settings
  + 4 months + Quotations for the prospect against aging settings

### Requirement Name and Number : Prospect Records/6.3.PRO.42.b

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.42 from the MRD.*

#### Use case

##### Overview

These new prospect records are the initial incarnation of a future customer or supplier account record for IRIS Exchequer.

##### Actors

Sales Representative

Purchase

Sales Manager

Purchase Manager

Project Purchaser

Project Manager

##### Scenarios

For the purposes of the processes below, functional behaviour is the same for both “Prospects” and “Supplier Prospects” and hence are referred to as prospect records below.

* The user shall view the Prospect record in order to set values such as user defined fields, addresses etc.
* The user shall view the Prospect record in order to set supporting elements such as the discounts or multi-buy combinations.
* The user shall view the Prospect record to obtain information – key contact, delivery address etc
* The user shall associate notes against the Prospect record
* The user shall view the opportunities associated with the prospect record
* The user shall view the Prospect record prior to printing a Prospect record.

#### Licensing Considerations

The Prospect Tab won’t be available unless a new valid 30 or full license has been released for the Prospect manager. Should a 30 day license expire, the data will just sit hidden in the tables, and won’t be directly accessible again until the license is renewed.

#### User interface changes



The above is a mock-up of the proposed new Prospect records.

#### 

#### Open Issues/Assumptions

* On selection of the Prospect record, the tab “Main” will open initially.
* The cursor flow when the user clicks “ADD” should be following fields prior to going into the tabs, in the tab order of main, discounts, multi-buy discounts, opportunities, notes and contacts
  + Acc No
  + Company name
  + Contact
  + Alt search
  + E-mail
  + Fax
  + Their A/c
  + Phone
  + Mobile
* The mobile number is a new field being introduced to the contacts plug-in. Although not indicated in the above mock-up, a mobile number will be included for each of the contacts.
* Short cuts should exist against each of the button controls (e..g. Alt-O = OK button)
* The only mandatory fields are Contact, Account Number and Company name. All others fields are optional.
* The contact in the header is actually the Primary contact. Therefore the values are replicated in both sets of fields during prospect creation.
* Support for the F9 copy previous value as per standard IRIS Exchequer.
* All field widths and their validation properties are a mirror of the traditional Customer/Supplier record fields. Unless specified below the values populated whilst as a Prospect are carried over to the Customer/Supplier record.
* The **account number** is completely separate/independent of the traditional Sales/Purchase ledger account number. It does however:
  + Have to remain a 6 alphanumeric field.
  + Follow the same validation rules as the existing sales/purchase account codes
  + During conversion to a customer/supplier record. A dated note line is inserted against the resulting Customer/Supplier record that states “This record was previously Prospect ID:” + *Prospect account number* by {username}
  + During conversion to a customer/supplier record. The normal validation rules for a new sales/purchase account record are applied.
* The conversion of a prospect record to a Sales/Purchase account will not only include the values populated on the Prospect record but also the supporting areas:
  + Prospect opportunity transactions will have their account code changed to the new sales/purchase ledger account code with a dated note inserted against the quotation that states “This opportunity was previously associated with Prospect ID:” + *Prospect account number* by {username}
  + Notes will be inserted onto the new customer/supplier record for Opportunity, stage, active and closed dates
  + Any Discount records
  + Any Multi-buy discounts
  + Any Notes
  + Any Links
  + Contacts will be transferred to the contacts plug-in, as contacts associated to the new customer or supplier record.
* A single note line (not shown in mock-up) will also be available for each contact.
* The values for stage, opportunity rating, prospect active date, and prospect close date do not get carried over to a customer/supplier record. They are prospect record specific.
* The **Opportunity** is not carried over to a Customer/Supplier record. This is the net value of all quotations associated with the Prospect record (in base currency)
* The **delete** option will not only remove the Prospect record, but also any quotations, discounts, notes, links, multi-discount records associated with the Prospect record.
* The **print** option will instigate the paperless window and select the associated form layout for a new “Prospect Record” based on its form definition set.
* The **quote** option will instigate the traditional IRIS Exchequer new quotation screen.
* The **sales GL Code** is not present for Supplier prospects.
* The **Send HTML** tick box is retained for continuity.
* The user defined labels will be customable via the IRIS Exchequer custom fields within system setup. Under the high level group Account Records, two new sub-groups will be made available. “Prospects” and Supplier Prospects. The tick to hide will follow the same principles as the rest of the Exchequer custom label fields.
* The opportunities ledger will include the columns :
  + Our Ref
  + Transaction Date
  + Total value (base currency)
  + Original value (Currency of transaction)
  + Margin (base currency)
  + Cost (base currency)
  + Your Ref (short)
  + Your Ref (long)
  + Status
* The opportunities ledger will include the sub-menu options of:
  + Add –instigates a new prospect quote
  + Close – closes the opportunities ledger.
  + Edit – Opens the opportunities for editing.
  + Find – Opens the objectFind dialog, and allows the user to find a transaction by Our Ref, Your Ref (short), Your ref (long),
  + Print – opens the Paperless dialog and allows print of the opportunity based on its form set
  + View – Opens the opportunity in view only mode
  + Copy – Copies the content of the quotation to a new opportunity number
* The **Contacts** Tab will be based on 4 contact records consisting of:
  + Title
  + Firstname
  + Surname
  + Salutation
  + E-mail address
  + Job Title
  + Tel Number
  + Fax Number
  + Mobile number
  + Note line

The above field is structured so that it mirrors the contact plug-in fields for an individual. The field widths of the above are assumed to be the same as the Contacts plug-in. The contacts plug-in will need to be expanded to incorporate the addition of the mobile number and note line.

### Requirement Name and Number : Toolkit Update for Prospects/opportunities/6.3.PRO.43

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.43 from the MRD.*

#### Use case

##### Overview

The new Prospect record and opportunity records for prospective Customers or Suppliers needs to be visible via the toolkits.

Actors

Toolkit Developer (referenced as user below)

(both internal to IRIS and external business partner).

##### Scenarios

* The user shall connect to a Prospect object to Add new prospective Customers or Suppliers.
* The user shall connect to a Prospect object to Edit a prospective Customer or Supplier record.
* The user shall connect to a prospect object to Delete a prospective Customer or Supplier record.
* The user shall connect to a prospect object to Print a prospective Customer or Supplier.
* The user shall connect to a prospect transaction object to Add a new sales/purchase quotation.
* The user shall connect to a prospect transaction object to Edit an existing sales/purchase quotation.
* The user shall connect to a prospect transaction object to Delete an existing sales/purchase quotation.
* The user shall connect to a prospect transaction(opportunity) object to Print an existing sales/purchase quotation.

#### Licensing Considerations

This extension would be part of the standard Toolkit license. The licensing of the Toolkit needs to respect the presence of a Prospect manager license.

#### User interface changes

Not Applicable

#### Open Issues

* It is assumed that an object will exist for Prospects and Prospective suppliers

### Requirement Name and Number : Importer Update for Prospect/opportunities /6.3.PRO.44

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.44 from the MRD.*

#### Use case

##### Overview

The new Prospect record and opportunity record for prospective Customers or Suppliers needs to be visible to the Importer.

##### Actors

Implementer (referenced as user below in Scenarios)

##### Scenarios

The user shall Import into Exchequer new prospects (either prospects or prospective suppliers)

The user shall import into Exchequer new Prospect or Prospective supplier based opportunities transaction records.

#### Licensing Considerations

Included automatically as part of the Importer

#### User interface changes

Not Applicable

#### Open Issues

None

### Requirement Name and Number : Data Dictionary update for Prospects/6.3.PRO.45

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.45 from the MRD.*

#### Use case

##### Overview

The fields associated with the Prospect record (and transactions) will need to be exposed via the data dictionary for use within the Visual Report Writer and Form Designer

##### Actors

Any IRIS Exchequer user who has access to create reports via the Visual Report Writer

##### Scenarios

The user shall select the fields during the creation of a custom report within the VRW.

##### 

#### Licensing Considerations

The Prospect record would be visible only when the Prospect manager has a 30 or full license activated.

#### User interface changes

None

#### Open Issue/ Assumptions

* It is assumed the relationships with a Prospect record would be:
  + Quotations
  + Notes
  + Discounts
* The Prospect would also be available via DDF’s for ODBC reporting.
* The Prospect (and prospective supplier) Transaction header and lines fields will also be available to both Form designer and Report writers.

### Requirement Name and Number : Prospect Print Record / 6.3.PRO.46

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.46 from the MRD.*

#### Use case

##### Overview

The ability to provide a printed version of the Prospect record (both types) is part of the solution via the Form designer.

Selecting the print option from either Prospect Tabs of the Traders list or within the Prospect record will instigate the paperless output selection dialog.

Actors

Sales Representative

Purchase

Sales Manager

Purchase Manager

Project Purchaser

Project Manager

#### Licensing Considerations

This option would only be present when the Prospect manager has a license activated (30 or Full)

#### User interface changes

* A new form category “Prospects” would be included for selection by the user. For this release it would include two items:
  + Item 1: Prospect Details
  + Item 2: Prospect Quotation Form
* A new form category “Supplier Prospects” would be included for selection by the user. For this release it would include two items:
  + Item 1: Supplier Prospect Details
  + Item 2: Supplier Prospect Quotation Form

#### Open Issues/Assumptions

* The Prospect Details form would function in the same way as a Customer/Supplier account details form.
* The Prospect quotation form would function in the same way as a traditional sales/purchase quotation form.
* All other Form designer functionality remains the same.

### Requirement Name and Number : Quotations for Prospects/6.3.PRO.47

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.47 from the MRD.*

#### Use case

##### Overview

The ability to generate Quotations (opportunities) for Prospect records . These are new transactions that exist in their own new transaction table.

##### Actors

Any Standard IRIS Exchequer user (especially those profiled) who have their user profile menu options enabled for “Prospect Details – Ability to Create Opportunities”

##### Scenarios

* The user shall instigate an opportunity for a Prospect record, complete the opportunity transaction and then store it in an opportunities daybook.
* The user shall instigate an opportunity from a Telesales transaction, which will then result in the transaction being stored in the opportunities daybook.
* The user shall instigate an opportunity from the “new transaction” option within Exchequer’s toolbar (sales or purchase opportunities)
* The user shall locate from the prospect Opportunities ledger an opportunity, and then convert it (and the Prospect to a customer/supplier) to either a quotation, order or invoice as determined by the user
* The user shall locate from the appropriate Opportunities daybook an opportunity, and then convert it (and the Prospect to a customer/supplier) to either a Quotation, order or invoiced as determined by the user

##### 

#### Licensing Considerations

The Prospect Tabs won’t be available unless a new valid 30 or full license has been released for the Prospect manager.

#### User interface changes

#### 

#### Open Issues/ assumptions

- During the creation of a new opportunity from the Exchequer toolbar or main Sales/Purchase opportunities daybook. What determines a valid prospect account code will be:

* The opportunity was instigated as a sale – therefore a Prospective Customer account code is valid
* The opportunity was instigated as a Purchase– therefore a Prospective Supplier account code is valid

- During the creation of a telesales transaction, the user will be expected to identify initially the type of account record (Customer or Prospective Customer) immediately. This will determine what types of transaction can be created as a consequence of using the Telesales module.

The Rule will be:

Prospective Customer records = Sales Opportunity transactions ONLY

Customer records = Sales Quotations, Sales orders and Sales invoices (as is the case now)

- The behaviour of the opportunity transactions during data entry would remain as it would for the traditional sales/purchase quotes.

- Prospect Opportunity transactions will respect the system switch “Keep SQU/PQU’s” date when converted

- Prospect based opportunities will adopt a new transaction prefix (SOP & POP). The user can set the next number for these document types via System Setup\Document numbers.

- When the user selects convert from a new Sales and Purchase opportunities daybook, The convert process will include for prospects the following actions:

- The prospect opportunity will have its account code changed to a new sales/purchase ledger account code. The standard account code number sequence increment will be used as the basis for the account code and then proposed to the user in a dialog for their confirmation. Should the user override the proposed new account code, then the value input by the user will be used for all the following actions

- The new account code will be applied to the prospect opportunities, which will also have a dated note inserted against it that states “This opportunity was previously associated with prospect ID:” + *Prospect account number*

*-* The prospect record associated with the opportunity will be converted to a ledger account (sales or purchase determined by its type). All field values will be carried over to the new ledger account record.

*-* The option to convert the opportunity transaction to a quotation, order or invoice (sales or purchase as appropriate)

- All supporting tables that related to the prospect record will re-attached to the new ledger account code. These areas are assumed to be:

- Any discount record

- Any multi-buy discounts

- Any notes

- Any links

- Telesales

- Account Stock/Analysis

- Any other prospect opportunities that existed, a dated note would inserted against each of these transactions (as above)

- Contacts for the main Prospect record will be transferred to the contacts plug-in as contacted associated to the new customer or supplier record.

- The existing quotation (SQU/PQU) transaction (sales or purchase) will be altered slightly to include two new fields. On the basis of minimal disruption, the vat table on the footer needs to be shortened to accommodate these fields. The fields are:

Stage: - 10 character field (alphanumeric)

Opportunity rate – 5 character field (alphanumeric)

When this transaction is converted to either a SOR or SIN (or Purchase equivalents), the stage and opportunity rates are inserted as dated notes against the transaction

- The above new fields (stage and opportunity rate) will also be included on the new Opportunity transactions.

The Stage field will be replicated four times (Prospects, Prospective suppliers, Sales opportunities, Purchase opportunities) as new pick lists managed via the system setup/ utilities area of IRIS Exchequer.

- ObjectDrill around functionality will be supported for Prospects and their opportunities (both Sales and Purchase types)

### Requirement Name and Number : License / 6.3.PRO.42.C

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.42 from the MRD.*

#### Use case

##### Overview

The new Prospect record and the ability to generate opportunities for Prospects will be associated with a module license

Actors

Internal Staff

Customer system administrator

##### 

#### Licensing Considerations

#### User interface changes

- New option within the multi-company manager

- New module available with the license generator

- New module available via WebRel

#### Open Issues

* Behaviour of the module license will be on the basis of:
  + Available as a Full license
  + Available as a 30 day license

### Requirement Name and Number : User Rights / 6.3.PRO.42.d

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.42 from the MRD.*

#### Use case

##### Overview

##### The standard Manager (Administrator) of IRIS Exchequer would need to set the access settings for an individual user via the normal Password settings menu option.

Actors

##### IRIS Exchequer system administrator (Manager)

##### Scenarios

**Sales**

* The user shall have access to Prospect Records
* The user shall have access to “Add” a Prospect record
* The user shall have access to “Edit” a Prospect record
* The user shall have access to “Delete” a Prospect record
* The user shall have access to “Print” a Prospect record
* The user shall have access to “Notes” for a Prospect record
* The user shall have access to the “Opportunities ledger” for a Prospect record
* The user shall have access to “Discounts” for a Prospect record
* The user shall have access to “Multi-buy” for a Prospect record
* The user shall have access to “Links” for a Prospect record
* The user shall have access to create opportunities for a Prospect Record
* The user shall have access to “Convert” a Prospect record to a customer record

**Purchase**

* The user shall have access to Prospective supplier Records
* The user shall have access to “Add” a Prospective supplier record
* The user shall have access to “Edit” a Prospective supplier record
* The user shall have access to “Delete” a Prospective supplier record
* The user shall have access to “Print” a Prospective supplier record
* The user shall have access to “Notes” for a Prospective supplier record
* The user shall have access to the “Opportunities ledger” for a Prospective supplier record
* The user shall have access to “Discounts” for a Prospective supplier record
* The user shall have access to “Multi-buy” for a Prospective supplier record
* The user shall have access to “Links” for a Prospective supplier record
* The user shall have access to create opportunities for a Prospective supplier Record
* The user shall have access to “Convert” a Prospective supplier record to a customer record

#### Licensing Considerations

The access settings listed above within the scenario’s are visible when the Prospect manager license has been released.

#### User interface changes

Introduction of two new groups “Prospects” and “Prospective Suppliers”, incorporating all of the above scenarios

Introduction of a new password under the group “Global Notepad” titled “View other diaries”

#### Open Issues

None

### Requirement Name and Number : User Defined fields / 6.3.PRO.42.e

**Requirement Type** : Functional

***Business* Analysis**

*This covers Requirement 6.3.Pro.42 from the MRD.*

#### Use case

##### Overview

The new prospect record includes 4 user defined fields. These user defined fields will need to function with the same level of functionality as currently applied to the user defined fields on either a Customer/Supplier record.

Actors

Sales Representative

Purchase

Sales Manager

Purchase Manager

Project Purchaser

Project Manager

#### Licensing Considerations

This extension would be part of the standard user defined fields plug-in. No new license is required.

#### User interface changes

- New sub-group for “Prospect” record within the user defined field admin module.

#### Open Issues

- No Customisation was intended as part of this first release. However hook points will be required to facilitate the user defined fields associated with a Prospect record.

- User defined fields associated with a sales/purchase quotation are expected to function in the same way. However, new handler ID’s will be required for both sales or purchase prospective opportunity transactions.

### Requirement Name and Number : Workflow Diary / 6.3.PRO.42.f

**Requirement Type** : Functional

***Business* Analysis**

*This covers a new requirement via feedback from the sales teams*

#### Use case

##### Overview

The existing workflow diary of IRIS Exchequer does not include a time stamp for each of the comments included. By extending the diary to include a time stamp, along with improved filters will enable the Workflow diary to operate effectively as an opportunities diary.

Actors

Sales Representative

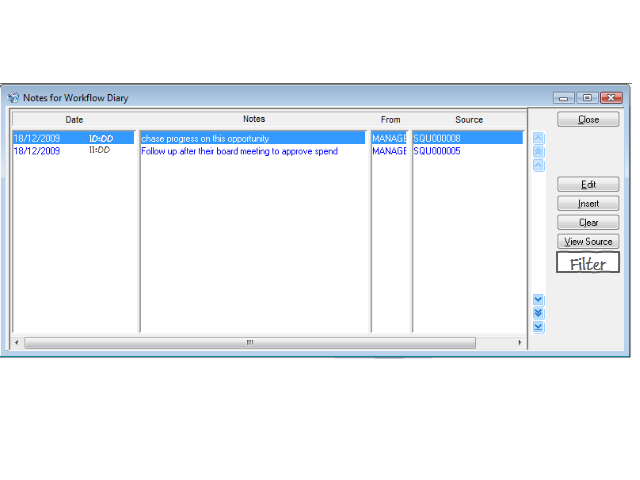
Sales Manager

#### Licensing Considerations

This extension would be part of the Core IRIS Exchequer product, no new license is required.

#### User interface changes

Introduction of the time field:



#### Open Issues/Assumptions

* Time stamp would include hours and minutes for a dated note within the diary system.
* Alarms would also have a time stamp included as above.
* The dates note entry form would also need to be expanded to include the time for an alarmed date.
* This time stamp would be applied to all date based notes in IRIS Exchequer.
* The **Filter** button when selected, will present a pick list of user ID’s, enabling the selection of an ID as a filter for the Workflow diary notes presented to the user.

The filter button is expected to include a filter option to include only “today’s” workflow notes – rather than all “un-cleared” notes when compared against the alarm.