

Project Brief

“Time of India” is looking forward to implement CRM (Dynamics) to manage its Newspaper Advertisement Department, to ensure that possible leads and business can be tracked with the organization.

As per the team responsible for the requirement analysis they have missed out few of the chunks, due to the communication gap among the different division, but the major requirement shared by the Team is as follows:-

- Time of India will be trying to manage the Sales : Marketing Module for their business
- The Sales Team needs the following
 - Once the details are logged in CRM, there would be field which will take the user to a new record where in the information
 - Details of User – Like Business Vertical with a description will be stored
 - It needs to be ensured that the access to the Address is Security checked and not all can access the same
- Since it would be implemented in the organization for the first time – they need some assistance sort of stuff over the form which can guide the user through information filling in the record
- Over the lead form, the business demands two new attributes whose sum total will be reflected in the third attribute and the attribute names are as follows
 - Quote per Ad
 - Number of Ads per Week
 - Total Amount per week (Need to show – multiplication of the two fields)
- The Business needs a functionality which the user can call over the click to undertake certain action of clearing out the data from the records once the record is either qualified /lost and is in the **read-only** mode
 - Quote per Ad
 - Number of Ads per Week
 - Total Amount per week (Need to show – multiplication of the two fields)
- More over there is a need by the business to have a functionality which is to edit the fields once the form is again in the **read-only** state using the User-Interface wherein they can fill in the information hand the field “Quote per Ad” will be updated to a new value shared by user.
- The business needs a validation check over the fields which is as follows:-
 - Quote per Ad -- The value can't be more that 1000/- : Error to be shown on the field
 - Number of Ads per Week – Can't be less than 10 : Error to be shown
 - Both the values needs to be entered by user – else form is not saved
 - If user modifies the value of “Quote per Week” – then “Number of Ads” set to blank
 - Total Amount per week – Need to recalculate the funds and show the new amount
- Need to see these three attributes in the View when the open /load the leads
- And Charts needs to be reflected based on the information from these three attributes
- Dashboard needs to have the chart (Funnel : Pie Graph) along with the sub grid of the leads with these three attributes

- There are more requirements from business but as of now – the team has been able to document this much only. Once the same is submitted to the “Time of India”, they would be sharing in more information based on the evaluation, as they too are new to CRM
- On request necessary information will be shared by the “Time of India” but that too can’t be assured, as business has flexibility to development and offer the best possible solution.