**Functional Design Document**

Enquiry creation

Microsoft Dynamics Business Central Implementation

Project Name – MSME

Document Name –Enquiry creation

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Submission Date –

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Prepared for – MISTER SHADES

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DOCUMENT HISTORY

**Change Record**

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| **Date** | **Author** | **Version** | **Revision Notes** |
|  | Ankur Mishra | 1.0 |  |
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**Reviewers**

| **Name** | **Position** | **Version Approved** | **Date** |
| --- | --- | --- | --- |
| Ashish Kathpal | Project Lead | 1.0 |  |

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1. Enquiry creation

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| --- | --- |
| **Requirement** | **Enquiry Creation** |
| **FRD Reference** | **SP5.2** |
| **GAP/FIT Reference** |  |
| **Functional Process**   * Enquiry will be created in Business central. * In case of new lead contact will be created and selected on opportunity card, but I case of enquiry from an old customer, that customer will be selected. * All the details from the customer request and details gathered from the interaction made, will be updated on the opportunity card. * All the technical specifications, site and structure details about the request will be specified in the enquiry. * Based on the type, value and quantum of the project further tasks will be assigned i.e. technical team should visit the site or sales team need to contact the customer. * Access to the enquiry will be restricted to the initiator’s ID and Sales manager and management will have the access to all the enquiries. * All the enquiry will have a specific timeline to get converted in proposals and after crossing the timelines system will intimate the users. | |
| **Assumptions / Challenges:** | |
| **Technical Design:**   1. Opportunities will be used to make the Enquires. 2. Caption of the page will be changed for user’s convenience. 3. Following field will be created in table **5092** in “**Opportunity**”, to accommodate all the necessary details: -  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Sr. No** | **Field name** | **New/ Standard** | **Descriptions** | **Remarks** | **Object details** | | 1 | Customer no. | New | Select an old customer from customer master | Create a new field |  | | 2 | Name | Standard | Rename **contact name** to Name | It will get updated by Contact name if contact is selected and if customer is selected customer name will be updated |  | | 3 | Source of Enquiry | New | Option field to select from drop down menu | Advertisement call, Social Networking, Cold calling. Staff member, Regular customer, Mail, Online form, Online Chat |  | | 4 | Person in charge | New | Project manager or contact person from customer’s side | Field to specify name in case of contact or drop down to contact list in case customer is selected. |  | | 5 | Product Type | New |  | Table will be created to maintain Product types and look up of that master will be given to select value here. | Create a table “Product Type”  With Fields   1. Code 2. Description | | 6 | Scope of work | Standard |  | Text field to specify the project details. | Use Description field | | 7 | Project location | New | Site address details | Text field to specify the details. |  | | 8 | Technical Specification | New | Technical details of the product dimensions, material etc. | Text field to specify the details. |  | | 9 | Drawing Details | New | Details of drawing shared by the customer | Text field to specify the details. |  | | 10 | Necessary documents | New | List of documents, required to analyse the site, structure and to make a proposal. | Text field to specify the details. |  | | 11 | Initiatives | New | Options of different initiative to be taken i.e. Site Visit by technical team, Sales Member involvement etc. | Text field to specify the details. |  | | 12 | Status | Standard | Status options i.e.  Under Progress, Quotation sent, Regret, Review, Under Approval  Updated by the user | Option field to select the current status of the Enquiry restricted to be updated by the initiator. | Use Status field | | 13 | Opportunity Type | New | Type of opportunity i.e.  Tender, Small, Big projects or job in hand | Option field to select from the given options |  | | 14 | Authority required | New |  | Boolean field |  | | 15 | Authorities | New | Types of Authorities DM, DCCA, Tarkhees, ADM, Consultants, others | Option field to select the type of authority to take approval from |  | | 16 | Days of conversion in proposal | New |  | Date field for tracking the timeline of creating proposal |  | | 17 | Date for submitting the Quotation | New |  | Date field for tracking the timeline for sending the quotes |  | | 18 | Account Holder | Standard |  | From the selected customer responsible Sales person mentioned on customer card will get updated. | Sales Person | | 19 | Enquiry Registered by | New | Name of The Initiator of Enquiry | Insert the user id of user creating New enquiry |  | | 20 | Follow-up By | New |  | Lookup of Users to select the User ID who is following up. Show name of the selected user ID. |  | | 21 | Follow-up Date/Time | New |  | Date and Time fields |  | | 22 | Design Input required | New |  | Boolean for yes and no |  | | 23 | Sample requested | New |  | Boolean for yes and no |  | | 24 | Remarks | New |  | Text field |  |  * Restriction to access  1. A Boolean will be created on **user setup** to mention the ID’s having **Enquiry Restriction**. 2. In user setup, against some ID if Boolean is set yes, then their access will be restricted if the user ID will not match with the user selected in “**Enquiry registered by**”. 3. User can access the list so that they can see few values and status of the enquiry. Restriction will be on open an enquiry.  * Highlight the enquiries didn’t meet their timeline   Based on the days specified in the field “**Days of conversion in proposal**”, if an enquiry is not getting selected on **Sales quote** with the days then that enquiry will be highlighted as red in the Enquiry List page. | |
| **Data Validations, Manipulations and Sorting:** | |
| **Test Scenarios:**   1. Check to access the enquiries using different ID than the user selected in “Enquiry registered by”. 2. Create Enquiry by specifying the “Days of conversion in Proposal”. And change the working date beyond date of creation of Enquiry plus days specified for conversion in Proposal.   Reopen the enquiry list that enquiry should be highlighted red. | |

Changes logs of CR:

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| **Sr.No.** | **Date** | **Change log Details** | **Given By** | **Developed By** |
| 1 | 26.03.2019 | **List of Modification:** 1. Opportunity Card/List page Caption "Enquiry" 2. Opportunity Type make it "Enquiry Type" 3.MSME Type make it "Lead Type" 4.Days of Cons. Pro. Make it Date of Cons. pro. 5. Creating new table/page for Enquiry Type for Date formula. 6. Date of cons. pro. Turn it red if date < current date. | Ankur Mishra | Mishra Avinash |
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