ICC LOQ Customization – Business Requirement Document

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1. Introduction

1.1 Overview

The ICC team requires a customization in LOQ to efficiently collect and manage customer data within their existing database structure. To fulfil this need, LOQ will be tailored to align with ICC's specific requirements in the **manufacturing industry**, ensuring seamless integration with their sales processes.

1.2 Purpose

This document outlines the necessary customizations and modifications required to integrate LOQ with ICC's workflows. The goal is to enhance data accuracy, process efficiency, and user experience while maintaining consistency with ICC's existing data management framework.

1.3 Business Objectives

- Improve lead management efficiency by structuring company and sales data.
- Reduce manual interventions by automating approvals and workflows. (TBD)
- Enhance data integrity by restricting unauthorized modifications.
- Enable seamless data migration from ICC's legacy system to LOQ.

2. Scope

2.1 Key Customizations

To facilitate the integration of LOQ with ICC's sales operations, the following customizations will be implemented:

1. Custom Fields for ICC Data Requirements

- LOQ will be enhanced with additional custom fields to accommodate ICC-specific data points.
- These fields will be designed in accordance with ICC's existing database structure to ensure seamless adoption and data consistency.

2. Approval Process for Field Modifications (TBD)

- Fields will be restricted from direct modifications by salesperson.
- If modifications are required, an approval process will be triggered to Regional Head.
- This process ensures data integrity, prevents unauthorized changes, and maintains audit trails.

3. Unique Identifiers for Leads, Opportunities & Quotations

- Each Lead, Opportunity, and Quotation will be assigned a Unique ID for data correlation and tracking.
- These unique identifiers will help in:
    - Establishing a clear connection between customer interactions at various sales stages.
    - Enhancing reporting and analytics for ICC's sales performance.

4. Conversion Checklist Configuration

- Users should have the ability to configure the checklist as optional.
- This would provide flexibility to determine if the checklist should be enforced.

5. Data Migration from ICC's Existing System to LOQ

- All historical customer and product offering data will be migrated into LOQ to ensure business continuity.
- Data validation and mapping rules will be followed to maintain accuracy and consistency.

2.2 Out of Scope

The customization request for modifying the approval mechanism in the product LOQ, which will alter the current workflow, is outside the scope of the standard offering. Currently, we are creating a tenant in the existing deployment; however, this requested customization requires a separate deployment to accommodate the new approval mechanism.

If ICC requires this customization to be implemented as a mandatory feature, an additional fee of ₹1,00,000 will be applicable for the deployment, including the development, testing, and implementation of the new approval mechanism.

This customization will involve additional efforts outside the original scope of work and requires a separate deployment from the current system.

3. Actors and Stakeholders

Role	Responsibilities
Salesperson	- Creates leads, opportunities, and quotations.
	- Updates their own leads, opportunities, and quotations.
Regional Head (TBD)	- Receives approval request notifications.
	- Reviews modifications and new company creation.
	- Approves modifications and new company creation.
Super Admin	- Manages users, roles, permissions, and configuration within the LOQ.

4. Use case

Use Case: UC001 - Lead Creation

Actors

- **Salesperson** – Responsible for initiating and entering lead details in LOQ.
- **Regional Head (TBD)** – Responsible for approving the new lead creation.
- **LOQ System** – Validates, processes, and stores lead information.

Description

This use case covers the process of creating a new lead in LOQ. A salesperson can either add a new company if it doesn't exist or select an existing one before entering lead details. The system assigns a Unique ID and tracks the lead's progress after approval from the regional head.

Preconditions

- User must have access to LOQ.
- Company may or may not exist in the system.

Flow of Events

1. The salesperson initiates lead creation in LOQ.
2. The system provides option to the user to search and either:
   - Add a new company (if it does not exist).
   - Select an existing company.
3. The user enters company and lead details depending on the selection above.
4. The system sends a request for approval to the regional head.
5. After the request is approved by the regional head, the system saves a lead and assign a unique ID.

Postconditions

- Lead is successfully created.
- Lead is linked to a company (existing or newly created).

Assumptions

- When the request is sent, salesperson cannot make any further changes.

Use Case: UC002 - Company Creation and Data Validation

Actors

- **Salesperson (Maker)** – Initiates company creation request.
- **Regional Head (Checker) (TBD)** – Approves company creation request.
- **LOQ System** – Validates duplicate entries and stores new company data.

Description

This use case defines the company creation process in LOQ. The system ensures that duplicate companies are not created by validating records before approval. If a company already exists, the system will notify the user.

Preconditions

- The company should not already exist in LOQ.

Flow of Events

1. The salesperson initiates a New Company request.
2. The system checks for existing company records to prevent duplicates.
3. If no matching company exists, the user fills in company details.
4. The request goes through an approval workflow for validation.
5. If approved, the company is created in LOQ.

Postconditions

- A new company record is added to LOQ.
- Leads, opportunities, and quotations can now be linked to this company.

Assumptions

- The system checks for duplicate companies before allowing creation.
- The validation process is automated and follows predefined rules.
- Company creation requires approval, and users cannot proceed without it.

Use Case: UC003 - **Approval Workflow for Modifications (TBD)**

Actors

- **Salesperson (Maker)** – Initiates requests for creating or modifying company, lead, opportunity, or quotation details.
- **Regional Head (Checker)** – Reviews and approves/rejects modification requests.
- **LOQ System** – Notifies the checker and applies approved modifications.

Description

This use case describes the approval process required for modifications in LOQ. Any change in a company, lead, opportunity, or quotation must go through an approval workflow where the Regional Head (Checker) reviews and either approves or rejects the request.

Preconditions

- User must be authorized to submit modification requests.

Flow of Events

1. The Maker submits a request to:
   - Add a new company and lead.
   - Add a new lead or opportunity.
   - Modify an existing lead, opportunity, quotation, or contact details.
2. The system triggers an approval request.
3. The Checker (Regional Head) receives a notification via email and LOQ.
4. The Checker reviews and approves/rejects the request.
5. If approved, changes are applied.
6. If rejected, the Maker is notified, and the request is returned for revision.

Postconditions

- Approved modifications are applied to LOQ.
- Unauthorized changes are prevented.

Assumptions

- The Maker can only submit modification requests but cannot approve them.
- The Checker (Regional Head) can only approve/reject but cannot modify the request.
- If a request is rejected, the Maker must resubmit a new request rather than edit the existing one.
- The approval workflow follows a strict sequence and cannot be skipped.
- The approval workflow applies to the modifications made to machine details and contact details of any lead, opportunity and quotation.

Use Case: UC004 - Lead Conversion to Opportunity & Quotation

Actors

- **Salesperson** – Responsible for qualifying and converting a lead into an opportunity and later into a quotation.
- **LOQ System** – Processes lead conversion, verifies criteria, and generates unique IDs for tracking.

Description

This use case outlines how a salesperson converts a lead into an opportunity, and later into a quotation. The system ensures that the lead meets qualification criteria before proceeding with conversion.

Preconditions

- Lead must exist in the system.
- Lead must meet qualification criteria.

Flow of Events

1. Salesperson selects a lead and initiates conversion.
2. The system verifies qualification status.
3. If criteria are met, the lead is converted into an Opportunity.
4. The Opportunity progresses to the Quotation stage based on sales actions.
5. A Unique ID is assigned to the Opportunity and Quotation.

Postconditions

- Lead is successfully converted.
- Opportunity and Quotation records are created in the system.

Assumptions

- A lead can only be converted if it meets the qualification criteria.
- Once a lead is converted into an opportunity, it cannot be reverted to a lead.
- The system automatically uses the same Unique ID for opportunities and quotations.

Use Case: UC005 - Quotation to Project & Account Creation

Actors

- **Salesperson** – Updates quotation status upon receiving a Purchase Order (PO).
- **LOQ System** – Converts the quotation into a project and creates a customer account.

Description

This use case describes how a Quotation is converted into a Project once a Purchase Order (PO) is received. The system also creates an account in LOQ, recognizing the company as a customer of ICC.

Preconditions

- Quotation must be approved.
- A Purchase Order (PO) must be received.

Flow of Events

1. Salesperson confirms receipt of PO and updates quotation status.

2. Salesperson converts the quotation into a Project.
3. They System creates an Account for that company in LOQ.
4. The company is recognized as an ICC Customer under the Accounts Module.

Postconditions

- Project and customer account are created in LOQ.

Assumptions

- A project can only be created once a valid Purchase Order (PO) is received.
- The account creation is automated and does not require manual entry.

Use Case: UC006 - Direct Opportunity Creation

Actors

- **Salesperson** – Creates a direct opportunity for existing customers.
- **LOQ System** – Ensures that a customer account exists before allowing opportunity creation.

Description

This use case allows a salesperson to create an opportunity directly, bypassing the lead stage. However, this is only allowed if an account already exists in LOQ for a company.

Preconditions

- An account must already exist in LOQ for a company.

Flow of Events

1. Salesperson initiates the Direct Opportunity creation process from an account.
2. Salesperson enters opportunity details.
3. The system assigns a Unique Opportunity ID and saves the record.

Postconditions

- Direct Opportunity is created and linked to a customer account.

Assumptions

- Direct opportunity creation is only allowed if an account already exists.
- The system assumes that all required customer details are pre-validated.
- Once a direct opportunity is created, it follows the standard sales workflow.

Use Case: UC007 - User Role Management and Permissions

Actors

- **Super Admin** – Assigns roles and permissions to the user
- **LOQ System** – Enforces access control based on assigned roles.

Description

This use case outlines how user roles are managed in LOQ. The administrator assigns different access, ensuring that only authorized users can perform specific actions.

Preconditions

- User must be created in LOQ.

Flow of Events

1. The administrator creates a role and provides permissions in LOQ.
2. The system enforces role-based access control (RBAC).
3. Users can access functionalities based on their roles (e.g., Salesperson vs. Regional Head).

Postconditions

- Users have appropriate access levels, ensuring data security.

Assumptions

- The system enforces Role-Based Access Control (RBAC).

- Users can only perform actions based on assigned roles.

Use Case: UC008 - **Notification for Lead Modification (TBD)**

Actors

- **Salesperson** – Receives notifications about approvals accepted and rejected.
- **Regional Head** – Receives approval request notifications.
- **LOQ System** – Sends notification based on the action taken by users.

Description

This use case defines how automated notifications are managed within LOQ. The system ensures that users are promptly notified of important sales activities related to approvals.

Preconditions

- The user must have an active LOQ account.

Flow of Events

1. A modification of lead activity triggers an event.
2. The system sends a notification via email and application.
3. The user reviews the notification and takes the necessary action.
4. The system logs the notification for tracking purposes.

Postconditions

- Users receive timely updates about critical actions.

Assumptions

- Notifications are automatically triggered by system events and cannot be manually sent by users.
- The Salesperson only receives notifications for leads, opportunities, and quotations they are assigned to.
- The LOQ system logs all notifications for future tracking and auditing.
- Notification settings cannot be customized by individual users, and all alerts follow the default system rules.

Use Case: UC009 - **Customer Interaction**

Actors

- **Salesperson** – Collects and enters customer interactions in the lead
- **LOQ System** – Stores, processes, and generates reports on customer feedback.

Description

This use case explains how customer interaction is collected within LOQ. The system enables ICC to gather insights on customer satisfaction, which can be used to improve products and sales strategies.

Preconditions

- Customer interactions must be logged in LOQ.

Flow of Events

1. Salesperson collects the information and interaction details.
2. Salesperson can save these details in the notes section of a lead.

Postconditions

- Managers gain insights for improving customer engagement.

Assumptions

- LOQ System does not validate the accuracy of interaction details—salespersons are responsible for entering correct information.

- Customer interactions in notes section do not trigger automated email follow-ups.

Use Case: UC010 - **Conversion Checklist Configuration**

Actors

- **Super Admin**– Configures the conversion checklist settings.
- **LOQ System** – Stores, enforces, and applies checklist configuration.

Description

This use case describes how the conversion checklist configuration is managed in LOQ. The system allows super admin to choose whether the checklist is mandatory or optional, providing flexibility in how leads are progressed and converted.

Preconditions

- The Super Admin must have the required permissions to modify checklist settings.

Flow of Events

1. The Super Admin navigates to the checklist configuration settings in LOQ.
2. The Super Admin can select the conditions which are applicable to convert a lead into next stage.
3. The LOQ System saves the configuration and applies the settings.
4. When a salesperson attempts to convert a lead into next stage, the system:
    - ➢ Enforces the checklist if set to mandatory.
    - ➢ Allows bypassing the checklist if set to optional.

Postconditions

- Salespersons follow the appropriate process based on whether the checklist is enabled or bypassed.

Assumptions

- Checklist configuration is applied at the tenant level, not for individual users.
- Changes to the checklist settings take immediate effect without requiring a system restart.
- The Super Admin is responsible for maintaining checklist conditions for compliance.

5. Data Flow/User Flow

The following workflow outlines how data and users interact within **LOQ**:

1. **Lead Creation**
    - Users create a Lead in LOQ.
    - During lead creation, they can either:
        - ➢ Add a new company if it does not already exist in the system.
        - ➢ Select an existing company and proceed with lead entry.

2. **Company Management**
    - A company can have multiple Leads, Opportunities, Quotations, and Contacts associated with it.
    - When creating a new company, users must complete predefined fields relevant to ICC's manufacturing industry.
    - If the company already exists, users can associate the lead with it and provide lead-specific details.

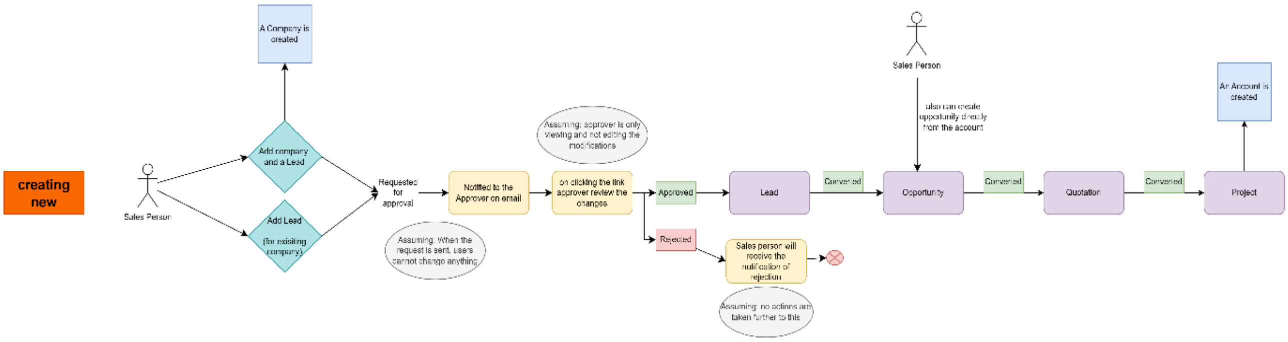
3. **Lead Conversion: Lead → Opportunity → Quotation**
    - Once a lead is qualified, it is converted into an Opportunity, following LOQ's sales workflow.
    - The Opportunity then progresses to the Quotation stage based on sales progress.

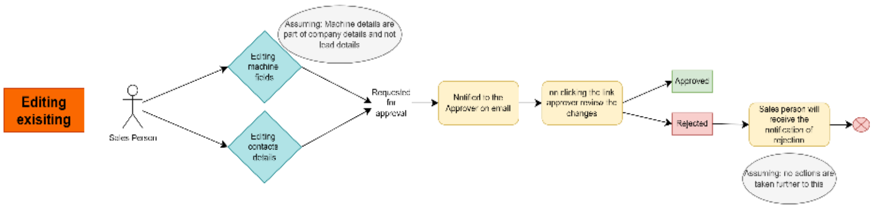
4. **Quotation to Project & Account Creation**
    - Upon receiving a Purchase Order (PO), the quotation is converted into a Project.
    - At this stage:
        - ➢ A customer account is created in LOQ.
        - ➢ The company is officially recognized as an ICC customer under the Accounts module in LOQ.

5. **Direct Opportunity Creation**
    - A Direct Opportunity can only be created in LOQ after a customer account has been established.

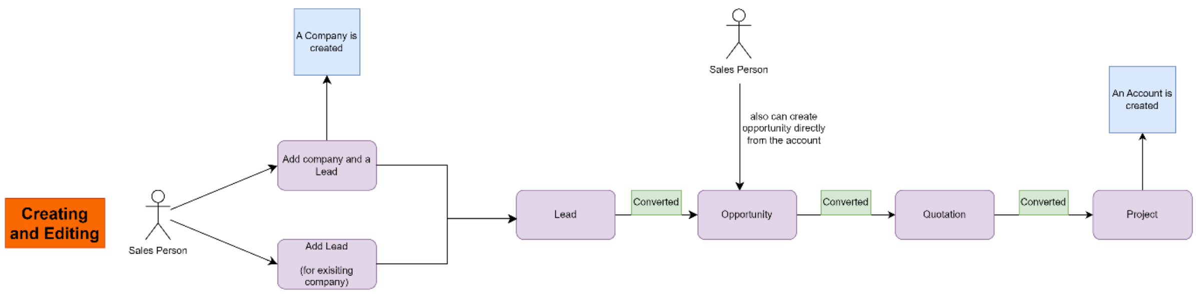
6. **Approval Workflow (TBD)**
    - Approval is required for the following actions:
        - ➢ Adding a New Company and Lead
        - ➢ Adding a New Lead
        - ➢ Adding a New Opportunity
        - ➢ Editing an existing Lead, Opportunity, Quotation, or Contact details
    - Approval Steps:
        - ➢ When a Maker (request initiator) submits a request, they will enter relevant details.
        - ➢ Upon submission, an approval request notification will be triggered.
        - ➢ A Checker (approver) will receive a notification via email and in the LOQ application.
        - ➢ The Checker must review the data before approval.
    - This process prevents unauthorized modifications, ensuring data accuracy and compliance.

Below Diagram Includes approval workflow. (TBD)





Below Diagram explains the existing LOQ flow.



6. Schema & API Details

Should be provided by the ICC Team (TBD)

Skillmine
Technology • Consulting • Services

7. Implementation Roadmap & Key Decisions

Phase	Key Activities	Deliverables	Timeline
Requirement Gathering and Design	Define project objectives and scope	Implementation Roadmap	1 Week
	Identify key stakeholders	Business Requirement	
	Requirement understanding	Design and workflow	
	Data/User flow for better understanding		
	Data Mapping with Oracle		
Development	Custom LOQ system functionalities	Functional System	2 Weeks
	Implement Oracle integration		
Testing & Validation	Unit testing by developers	Test Reports	1 Week
	System Integration Testing (SIT)	Bug Fixes	
	User Acceptance Testing (UAT)		
Data Migration	Extract, transform, and load data	Migration Reports	1 Weeks
	Validate data integrity	Validation Logs	
	Reconcile legacy and new system data		
Deployment	Deploy system to new instance	Deployment Report	1 Week
	Perform final validation	System Go-Live	
	Monitor initial usage		
Support and Training	User Training Sessions	NA	1 Week
	User Manuals and Documentation	NA	