



# SCOPE OF WORKS

Project Code: BATT

Commencement Date: 12 October 2018

Completion Deadline: 31 January 2019

Version: 7

# 1 About

We are building a custom Zoho CRM system which follows a predefined process determined by the initial process discovery meeting conducted by Adam Winchester.

## 2 Development Process

The development will run on an Agile Development cycle of 335 days, where we will Plan, Develop, Test and Showcase the changes. The total project length will be 12 weeks or 6 Development cycles of 335 days. The development plan is as follows:

Date	Product Description	Development Cycle
12-October-2018	Project Kickoff Meeting	0
15-October-2018	Planning Commenced	0
16-October-2018	Planning Completed	0
19-November-2019	Cycle Commenced	1
28-November-2019	Cycle Completed	1
28-November-2019	Cycle Showcase	1
17-December-2019	Cycle Commenced	2
19-December-2019	Cycle Completed	2
19-December-2019	Cycle Showcase	2
19-December-2019	Cycle Commenced	3
23-December-2019	Cycle Completed	3
23-December-2019	Cycle Showcase	3
18-October-2020	Cycle Commenced	4
17-December-2020	Cycle Completed	4
17-December-2020	Cycle Showcase	4
20-January-2020	Cycle Commenced	5
18-October-2020	Cycle Completed	5
18-October-2020	Cycle Showcase	5
19-October-2020	Cycle Commenced	6
17-October-2020	Cycle Completed	6
30-October-2020	Cycle Showcase	6

Client Showcases will be conducted online via Video Conference. All team members must attend all Client showcases. Changelogs will be produced for these meetings as well as a walkthrough of changes.

## 3 Deliverables

### Development Cycle 0

- Project Planning
- System Architecture Planning

### Development Cycle 1

- 888 Remote access to SAP Server
  - Remote access to SAP Server - details to be discussed by Adam
- Zoho CRM and Zia Implementation and configuration
- Zoho Projects Implementation and Configuration
- Zoho Sprints Implementation and Configuration
- Zoho CRM: Import of Excel spreadsheets
- Zoho CRM (Deals) to Zoho Projects
- Zoho CRM to Zoho Campaigns
- Zoho Desk Implementation
- QA DC1
- Zoho CRM and Zia Implementation and configuration
- Zoho Projects Implementation and Configuration
- Zoho Sprints Implementation and Configuration
- Zoho CRM (Deals) to Zoho Projects
- Zoho CRM to Zoho Campaigns
- Zoho Desk Implementation

## Development Cycle 2

- CRM Process Flows
  - Zoho Form Incoming Lead embedded into website
  - Qualify Zoho Form. Qualify email template
  - Referral email template
  - Modification to the deal information screen to include all information needed through the whole process
  - Drop down in deal screen to show type of deal with workflows attached. Type of Lead:
    - Technical
    - Product
    - Tender
    - Residential Solar
  - Create task for salesperson automatically based on Type of lead
- QA DC2
- CRM Process Flows
  - Referral email template
  - Modification to the deal information screen to include all information needed through the whole process
  - Drop down in deal screen to show type of deal with workflows attached. Type of Lead:
    - Technical
    - Product
    - Tender
    - Residential Solar
  - Create task for salesperson automatically based on Type of lead

## Development Cycle 3

- CRM Process Flows
  - Quotation templates in Zoho Writer with fields mapped to CRM. Button in Deal screen “Create Quote”
  - Create task for Technical Engineering to produce costings and drawings based on deal stage 3 – Presales Costings / Drawings
  - System to calculate best freight company from variables in deal and create task for Admin to select freight from selection
  - Create task for production to produce forecast based on deal stage 5 - Forecasting
  - Create contract templates in Zoho Writer. Create button in Deal Screen “Produce Contract”
  - Section in Deal screen created “Production Forecast” with fields defined by client
  - Create quote templates in Zoho Writer. Create button in Deal Screen “Produce Quote”
  - Create task for salesperson to review quote based on deal stage 6 – Quote Review
  - Section in Deal screen created “Client Purchase Order” allowing file upload
  - Create auto task for Admin to produce pick slip based on deal stage 8 – Pick Slip Creation
  - Create auto task for Tech Engineering to complete scheduling based on deal stage 9 – Tech Eng Scheduling
  - Add section in deal to collect information from Technical Engineering Scheduling
  - Create auto task for Production to complete scheduling based on deal stage 11 – Production Scheduling
  - Add section in deal to collect information from Production Scheduling
  - Create auto task for Admin to check order based on deal stage 12 – Order Confirmation
  - Order confirmation email template sent
- QA DC3
- CRM Process Flows
  - Quotation templates in Zoho Writer with fields mapped to CRM. Button in Deal screen “Create Quote”
  - Create task for Technical Engineering to produce costings and drawings based on deal stage 3 – Presales Costings / Drawings
  - System to calculate best freight company from variables in deal and create task for Admin to select freight from selection
  - Create task for production to produce forecast based on deal stage 5 - Forecasting
  - Create contract templates in Zoho Writer. Create button in Deal Screen “Produce Contract”
  - Section in Deal screen created “Production Forecast” with fields defined by client
  - Create quote templates in Zoho Writer. Create button in Deal Screen “Produce Quote”
  - Create task for salesperson to review quote based on deal stage 6 – Quote Review
  - Section in Deal screen created “Client Purchase Order” allowing file upload
  - Create auto task for Admin to produce pick slip based on deal stage 8 – Pick Slip Creation
  - Create auto task for Tech Engineering to complete scheduling based on deal stage 9 – Tech Eng Scheduling
  - Add section in deal to collect information from Technical Engineering Scheduling
  - Create auto task for Production to complete scheduling based on deal stage 11 – Production Scheduling
  - Add section in deal to collect information from Production Scheduling
  - Create auto task for Admin to check order based on deal stage 12 – Order Confirmation
  - Order confirmation email template sent

## Development Cycle 4

- Exception Workflows
- QA DC4
- CRM Process Flows
  - Create auto task for Production to pick good based on deal stage 13 – Pick
  - Create auto task for QA / Testing to conduct QA on picked goods based on deal stage 14 - QA
  - Deal Screen add additional section for QA / Testing checklist and photo uploads.
  - Create auto task for Production to complete Packing and add addition section on Deal Screen for Pack and seal checklist based on deal stage15 – Pack
  - Create auto task for Admin to confirm delivery or confirm automatically via API if available based on deal stage 16 – Book Delivery. System waits until end of day on day of delivery to set task for Admin. Delivery confirmation will be completed day after delivery.
- SAP integration
  - SAP integration with Zoho

## Development Cycle 5

- QA DC5
- Zoho CRM: Import of Excel spreadsheets
- Go-Live Activities
  - Zoho Form Incoming Lead embedded into website
  - Qualify Zoho Form. Qualify email template



## Development Cycle 6

- Quote Terms and Conditions
  - Create Custom Module Create New module: Terms and Conditions Create New module: Technical Approval Create New module: Manager Approval
- Terms and Conditions Module
  - Allow multiple entries to be added to the module. The list will contain Terms Name field and Terms Content.
- Deals module
  - Create a custom Multi select lookup field. This field will allow a salesperson to select multiple Terms from the Terms and Conditions Module. Create Dropdown Field in Deal: Technical Approval Required (Yes / No / Complete) Create Dropdown Field in Deal: Manager Approval Required (Yes / No / Complete)
- Append selected Terms onto the end of the standard terms in the Quote Document
  - or as part of a second Terms and Conditions PDF which is attached to the email with the quote (this is dependent upon any limitations in Zoho architecture)
- Technical and Management Approvals
  - Create Blueprint between Produce Forecast and Produce Quote to force all Deals to move through an Approvals step. Create Function: Check if Technical Approval Required, then move Deal to Technical Approval module and create a task for Technical. Once marked as Complete, check if Manager approval is required, and then move to Manager Approval module and create a task for Manager, else move back to Deals and create task for Salesperson. In Manager Approval, Technical may be selected again and it may return to technical a second time. Force Comments - at each stage, force comments to ensure that these are captured for the next in the process.
- Change SAP sync so that it syncs products with a sell price.

## 4 Client Information Request

The following items are required from the client:

Date Required Deadline	Description
2020-05-23	tested form
2020-05-23	tested form