SHARE Cloud Implementation

Oracle Sales Cloud CRM Platform

Requirement Specification, v1.0

Table of Contents

1. Purpose of the Document 4
2. Key Objectives for SHARE Cloud 5
3. Scope of SHARE Cloud Project 6
   3.1. SHARE Cloud Actors 6
      3.1.1. IM/CP Account Executive 6
      3.1.2. DX Account Executive 6
      3.1.3. Service Sales Executive 6
      3.1.4. Key Account Manager 7
      3.1.5. IM/CP Product Specialist 7
      3.1.6. DX Product Specialist 7
      3.1.7. IM/CP Sales Manager 8
      3.1.8. DX Sales Manager 8
      3.1.9. IM/CP Business Manager 9
      3.1.10. DX Business Manager 9
      3.1.11. Service Sales and Business Manager 9
      3.1.12. C-Level 9
      3.1.13. Remote Sales Support 10
      3.1.14. Back Office Specialist 10
      3.1.15. SHARE System Administrator 10
      3.1.16. SHARE Country Administrator 11
      3.1.17. SHARE Account Administrator 11
   3.2. Use Case to Actor Mapping 12
   3.3. Use Case to Sales Process Mapping 13
4. SHARE Cloud Use Cases 14
   4.1. Accounts 17
   4.2. Activities 37
   4.3. Contacts 47
   4.4. Installed Base 51
   4.5. Leads 69
   4.6. Opportunities and Projects 86
   4.7. Win/Loss 102
   4.8. Social Network 108
   4.9. Products 119

4.10. Interfaces: CPQ 122
4.11. Interfaces: All Other Interfaces 131
4.12. Supplementary Requirements 149
4.13. System Administration Requirements 156
4.14. Non-functional Requirements 160
4.15. Analytics Supplementary Requirements 163
5. Glossary 165
6. Revision History 172

1. Purpose of the Document

Customer Relationship Management (CRM) at Siemens Healthcare is the foundation for a strong and successful Regional Sales Organization. CRM is not just a set of processes – it is an organizational culture that ensures our singular and unwavering focus on the customer.

Our new CRM system, named SHARE Cloud, will be the key enabler for our "CRM Excellence & Business Excellence" program with the goal to continuously support and further extend our competitive advantage in CRM. Furthermore it will to support the global sales organization in delivering value and becoming the partner of choice for our customer.

Siemens Healthcare is one of the world's largest providers to the healthcare industry and a leader in imaging systems, and laboratory diagnostics. We offer customers products and solutions for comprehensive patient care from a single source – from prevention and early diagnosis to therapy and aftercare. By optimizing the clinical procedures associated with the most important medical conditions, we help make healthcare faster, better, and more cost-efficient.

By offering a large range of products and solution we are facing the challenge our sales projects are very heterogeneous. I.e. we are offering small ticket items and big ticket items, system and reagent business, single modality deals and multi-modality deals as well as service.

This is the major challenge for our new CRM system that we need to deal with.

This document serves as the Requirement Specification for the SHARE Cloud CRM system. SHARE Cloud will be implemented on the Oracle Sales Cloud CRM platform.

2. Key Objectives for SHARE Cloud

- Higher user satisfaction and acceptance compared to the current SHARE by
  - an intuitive and easy to use user interface
  - an integration of analytical "give-backs" such as dashboards and dynamic reports into the GUI of the CRM system
  - short loading and response times
- Reduced customization (via adherence to standard, "vanilla" functionality) in order to reduce the maintenance effort and allow Siemens HC to benefit from new software releases
- Provide a platform independent, multi-device capable solution
- Enable Siemens HC to grant Business Partners direct access to SHARE Cloud based on required assignment rules and visibility criteria
- Seamlessly integrated in the overall Siemens HC CRM IT landscape, including the new C-P-Q tool

3. Scope of SHARE Cloud Project

3.1. SHARE Cloud Actors

3.1.1. IM/CP Account Executive

- Serves as the first and primary IM/CP sales contact for customer accounts within a defined sales territory
- Can be a Siemens employee as well as an external business partner
- Responsible for the order and sales income, account penetration, profitable growth and customer satisfaction of his/her defined accounts
- Meets with customer contacts and management to determine present and future business objectives
- Develops all qualified sales opportunities
- Negotiates key sales issues as appropriate
- Follows-up and manages post-sale actions

3.1.2. DX Account Executive

- Serves as the first and primary DX sales contact for customer accounts within a defined sales territory
- Can be an instrument sales representative or an assay sales specialist who is focused on method penetration
- Can be a Siemens employee as well as an external business partner
- Responsible for the order and sales income, account penetration, contract compliance and performance, profitable growth and customer satisfaction of his/her defined accounts
- Meets with customer contacts and management to determine present and future business objectives
- Develops all qualified sales opportunities (incl. config & pricing) and qualifies the leads
- Negotiates key sales issues as appropriate
- Follows-up and manages post-sale actions

3.1.3. Service Sales Executive

- Is a dedicated sales person for Siemens Healthcare Customer Service offerings. Similar to an Account Executive, but only responsible for service contract sales (not equipment sales)
- Is a Siemens employee.

- Checks the current service contracts for accuracy and business potential and follows up with customer in case of potential
- Uses Installed Base (IB) information to generate business
- Defines service levels fitting to the customer
- Responsible for the configuration and pricing of service offerings

3.1.4. Key Account Manager

- National or global Key Account Manager (KAM)
- Is responsible for the development, exploitation and maximization of the national / global account penetration and profitable growth of the assigned key account
- Is responsible for the achievement of the account business targets, including e.g.: order intake, opportunity pipeline, account penetration, customer relationship management and profitability
- Analyzes key customer’s market, business targets & strategy, issues, needs, processes, value chain and key business drivers
- Develops and maintains the Account Business Plan (ABP)
- Builds and leads a KAM team with members of the relevant Siemens organizations to develop business with the key customer and meet the common goal: profitable growth for Siemens
- Identifies, develops and drives leads and opportunities as part of the Account Business Planning together with the KAM team

3.1.5. IM/CP Product Specialist

- Serves as a technical expert for a specific IM/CP Business Unit / product line in a local Healthcare Sales Organization (country or region)
- Answers customer's and sales team's detailed product questions
- Provides product training to sales teams as appropriate
- Participates in joint sales meetings with account executive and customer (e.g. product demo, customer presentations)
- Generates product configurations incl. pricing in alignment with Account Executive
- Supports the IM/CP Account Executive in generating tender responses and proposal documents

3.1.6. DX Product Specialist

- Serves as a technical expert for a specific DX Business Unit / product line in a local Healthcare Sales Organization (country or region)
- HCS consultants and DX Product Marketing are also considered within this user class.
- Answers customer's and sales team's detailed product questions

- Provides product training to sales teams as appropriate
- Participates in joint sales meetings with account executive and customer (e.g. product demo, customer presentations)
- Generates product configurations incl. pricing in alignment with Account Executive
- Supports the DX Account Executive in generating tender responses and proposal documents

3.1.7. IM/CP Sales Manager

- Line manager for the IM/CP Account Executives that are assigned to/working in his/her sales region
- IM/CP Business Partner Managers / Channel Managers are also considered within this user class
- Supervises the development and execution of sales strategy / marketing plans
- Drives the achievement/overachievement of order and sales targets in his/her area of responsibility with a view to market and customer transparency at highest possible margin
- Defines coverage strategy
- Maintains and develops contacts and relationships with key/strategic customers and internal stakeholders on appropriate management levels
- Assists in positioning and negotiating strategic sales orders with customers
- Ensures funnel is effectively managed
- Provides accurate forecasts on orders and revenue

3.1.8. DX Sales Manager

- Line manager for the DX Account Executives that are assigned to/working in his/her sales region.
- DX Business Partner Managers / Channel Managers are also considered within this Persona
- Supervises the development and execution of sales strategy / marketing plans
- Drives the achievement/overachievement of order and sales targets in his/her area of responsibility with a view to market and customer transparency at highest possible margin.
- Is usually the first level approver for deal escalation
- Defines coverage strategy
- Maintains and develops contacts and relationships with key/strategic customers and internal stakeholders on appropriate management levels
- Assists in positioning and negotiating strategic contracts / deals with customers
- Ensures funnel is effectively managed
- Provides accurate revenue forecasts and input for S&OP forecast

3.1.9. IM/CP Business Manager

- Is the representative of an IM/CP Business Unit (BU) in a country/region (i.e. CBM, RBM) who interfaces between country/region sales organization and BU headquarters
- Drives achievement/overachievement of a) order and sales income and b) the P&L for his/her BU in a country/region
- Is the local master of price escalation
- Is responsible for budget planning / forecasting (MTA/MBR) for his/her BU in a country/region
- Develops BU-specific local strategy (incl. local marketing strategy)
- Is usually the line manager of IM/CP product specialists

3.1.10. DX Business Manager

- Is the representative of a DX Business Unit (BU) in a country/region (i.e. CBM, RBM) who interfaces between country/region sales organization and BU headquarters
- Drives achievement/overachievement of P&L for his/her BU in a country/region
- Is the local master of price escalation
- Is responsible for budget planning / forecasting (MTA/MBR) for his/her BU in a country/region
- Develops BU-specific local strategy (incl. local marketing strategy)
- Is usually the line manager of DX product specialists

3.1.11. Service Sales and Business Manager

- Customer Service (CS) Business Manager or CS Sales Manager (both have very similar tasks to perform in SHARE and are considered within the same user class)
- If CS Business Manager: Has overall responsibility for Service Sales in a country/region and defines service offerings for country/region
- If CS Sales Manager: Line manager for CS Service Sales
- Identifies service potential
- Is involved in budget planning/forecasting and ensures Service funnel is effectively managed
- Assists in positioning and negotiating strategic contracts with customers
- Involved in escalation/approval processes for Customer Service offerings

3.1.12. C-Level

- Country/region C-Level person (e.g. SCL, SCC, DCL, CSL, CSC, GPO director)
- Is responsible for the overall success of the respective country/region respectively for his/her division in the country/region

- Has a strategic business focus; does usually not do operational work in SHARE
- Is involved in pricing/negotiations and pricing/profitability escalations
- Is ultimately responsible for the country/region funnel adequacy, forecast quality, win/loss KPIs, etc.

3.1.13. Remote Sales Support

- Back-office person who usually has no direct customer contact
- Provides administrative support to Account Executives / Product Specialists / Sales Managers / etc., especially for the CRM data maintenance (e.g. updating Opportunities / Contacts / Activities / etc. in SHARE)
- Can be responsible for the administrative management of tenders/projects
- Can support offer generation in conjunction with Account Executives and Product Specialists
- Can be responsible for administrative post-offer activities (e.g. forwarding offer to logistics)

3.1.14. Back Office Specialist

- Container for various back-office personas that have similar responsibilities within SHARE (different responsibilities outside of SHARE)
- This user class includes: Business Analysts, Commercials, DX Offer Admins, DX Country Business Operations, DX International Business Operations, IM/CP BU Headquarters, etc.
- Generally read-only access to all basic objects and read-write for Activities, Contacts, and Social Network needed.

3.1.15. SHARE System Administrator

- Is responsible for maintaining the CRM system
- May include development resources
- May include helpdesk resources
- Has access to all functions in the CRM system, including restricted functions that other users cannot access.
- Can define, modify, and create system-wide policies
- Can perform mass, system-wide data changes and restatements
- Can perform mass, system-wide data loads
- Can override system-restricted field values

3.1.16. SHARE Country Administrator

- Driver of SHARE usage in a country/region
  - Reinforces the use of SHARE tools
  - Acts as a first point of contact and first level support within his/her country/region
  - Acts as local voice of SHARE: cascade messages from central SHARE organization to relevant end-users
  - Manages change prior to, during and after SHARE releases
  - Supports end-users with requesting access to SHARE tools
- Gives end-user trainings for SHARE in his/her country/region
- Monitoring & reporting of SHARE Data Quality
- SHARE data management
  - Upload and assignment of leads
  - Update of local price list
  - Administration of Terms & Conditions in SHARE
  - SHARE User Management (e.g. user access rights, etc.)

3.1.17. SHARE Account Administrator

- Creates new Accounts in SHARE based on user requests.
- Maintains Accounts in SHARE based on user requests.
- Verifies newly-created Accounts to ensure they are viable customers for Siemens Healthcare.

3.2. Use Case to Actor Mapping

Please refer to Exhibit 1, section V-A (Primary Requirements Specification) in the SHARE Cloud RFP document for the Use Case to Actor Mapping document.

3.3. Use Case to Sales Process Mapping

Please refer to Exhibit 1, section V-A (Primary Requirements Specification) in the SHARE Cloud RFP document for the Use Case to Sales Process Mapping document.

4. SHARE Cloud Use Cases

This chapter contains all the use case descriptions and the associated functional requirements. The following table lists all the use case families and the individual use cases and the reference to their page number in this document.

Accounts	
001 - User submits request to create a new Account	p. 17
002 - Account Administrator creates and verifies an Account	p. 19
003 - Update an existing Account	p. 22
004 - Verify and apply requested updates to Accounts in the CRM system	p. 25
005 - Maintain an Account's legal / ownership relationships	p. 27
006 - Maintain an Account's network relationships	p. 29
007 - Maintain an Account's non-legal Account-to-Account relationships	p. 31
008 - Maintain an Account's business plan	p. 32
009 - Account Administrator merges Accounts	p. 35
Activities	
001 - Create a new Appointment	p. 37
002 - Assign an Appointment to one or more internal employee(s)	p. 38
003 - Update an Appointment	p. 39
004 - Create a new Task	p. 42
005 - Assign a Task to one or more internal employee(s)	p. 44
006 - Update a Task	p. 45
Contacts	
001 - Create a Contact	p. 47
002 - Maintain a Contact	p. 49
Installed Base	
001 - Manually create a Competitor Install Base System	p. 51
002 - Automatically create a Competitor Install Base System	p. 53
003 - Review Siemens/Competitor Install Base	p. 54
004 - Manually update Installed Base System	p. 56
005 - Automatically update Competitor Install Base	p. 58
006 - Notify Install Base Manager when Siemens Install Base requires updates	p. 59
007 - Generate Opportunity from Competitor Installed Base System	p. 61
008 - Generate Opportunity from Siemens Installed Base System	p. 63
009 - Generate Lead(s) from Competitor Installed Base System(s)	p. 65

010 - Generate Lead(s) from Siemens Installed Base System(s)	p. 67
Leads	
001 - Import a group of Leads from an external source	p. 69
002 - Create a Lead Manually	p. 71
003 - Create Lead(s) via an interface	p. 72
004 - Automatically assign a Lead	p. 73
005 - Manually assign a Lead	p. 74
006 - Review a Lead	p. 75
007 - Promote a Lead	p. 77
008 - Abandon a Lead	p. 79
009 - Postpone a Lead	p. 81
010 - Admin modifies a Lead’s Opportunity Association	p. 83
011 - Purge a group of imported Leads	p. 84
Opportunities & Projects	
001 - Create a new Opportunity and Opportunity-Product	p. 86
002 - Create a Service Point of Sale Opportunity from an Equipment Opportunity	p. 88
003 - Update an existing Opportunity	p. 90
004 - Change an existing Opportunity’s Project assignment	p. 92
005 - Create a new Project and assign an Opportunity to it	p. 94
006 - Update a Project	p. 96
007 - Copy an Opportunity	p. 98
008 - Import business partner Opportunities	p. 100
Win Loss	
001 - Sign an Opportunity	p. 102
002 - Lose an Opportunity	p. 104
003 - Abandon an Opportunity	p. 106
Social Network	
001 - Create a team conversation	p. 108
002 - Administer settings and participants for an existing team conversation	p. 111
003 - Participate in an existing team conversation	p. 114
004 - Join an existing team conversation	p. 116
005 - Leave an existing team conversation	p. 118
Products	
001 - Import product data into CRM system	p. 119
002 - Maintain product data in the CRM system	p. 121

Interfaces CPQ	
001 - Request a new Configuration and Quote for one or more Opportunities	p. 122
002 - Update existing CRM Opportunity and Opportunity-Product from CPQ Quote Configuration	p. 125
003 - Launch an existing CPQ Quote from a CRM Opportunity	p. 127
004 - Create a new CPQ Configuration from an Opportunity in the CRM system	p. 129
Interfaces Others	
001 - ERP system updates CRM system when Order is Booked	p. 131
002 - ERP system updates CRM system when Order is Cancelled	p. 132
003 - ERP system updates CRM system when Order is Modified	p. 133
004 - Interface data from CRM system to Outlook	p. 134
005 - Interface data from Outlook to CRM system	p. 135
006 - Interface Siemens Installed Base Systems from external system to CRM system	p. 136
007 - Interface Account data from external system to CRM system	p. 137
008 - Interface Account data from CRM system to external system	p. 138
009 - Interface users and associated data from an external system to the CRM system	p. 139
010 - Interface Leads from an external system to the CRM system	p. 140
011 - Interface a defined set of data from the CRM system to the business warehouse	p. 141
012 - Export data from a list in the CRM system to a user’s local device	p. 142
013 - Manually export data across objects from the CRM system	p. 143
014 - Automatically export data across objects from the CRM system	p. 145
015 - Automatically create new Opportunities through an interface	p. 147
016 - Create, update, and delete data in the CRM system via a manually-configured data load	p. 148
Supplementary Requirements	
Supplementary Requirements	p. 149
System Administration Requirements	
System Administration Requirements	p. 156
Non-functional Requirements	
Non-functional Requirements	p. 160
Analytics Supplementary Requirements	
Analytics Supplementary Requirements	p. 163

4.1. Accounts

An Account represents a legal entity or a department within a legal entity, with which Siemens Healthcare is currently doing business with or is planning to do business with in the future.

On a transactional level an Account can take different roles (Sold-To, Ship-To, End-User, etc.).

Use Case ID	Account001
Use Case Name	User submits request to create a new Account
Use Case Description	To submit a request to create a new Account in the CRM system to an Account Administrator.
Actor(s)	DX Account Executive, IM/CP Account Executive, Service Sales Executive, Remote Sales Support, Key Account Manager
Business Partner	Yes
Trigger(s)	User identifies an Account that s/he believes does not yet exist in the CRM system.
Pre-Conditions	1. User is authorized to submit new Account creation requests.
Post-Conditions	1. An Account creation request exists and has been submitted to an Account Administrator.
Assumptions	1. Account creation requests may be initiated from, but are not necessarily stored or processed within, the CRM system. This may vary on a country-by-country basis. 2. The term 'external system' as used in the normal flow can refer to any kind of workflow/application outside the CRM system, e.g. intranet page, MS Outlook
Normal Flow	1. User initiates Account creation request inside the CRM system. 2. CRM system navigates user to external system. 3. User provides relevant information and submits Account creation request to Account Administrator outside the CRM system.
Alternative Course 1	**User submits Account creation request within the CRM system** 1a. User initiates Account creation request inside the CRM system. 2a. CRM system allows user to enter relevant information. 3a. User provides relevant information and submits Account creation request to Account Administrator inside the CRM system.
Requirements from this Use Case	FR Account001-001: The system shall allow a user to initiate an Account creation request. (Step 1) FR Account001-002: The system shall route a user to the appropriate external system in order to initiate an Account creation request. (Step 2) FR Account001-003: The system shall allow a user to enter relevant information for an Account creation request. (Step 2a)

	FR Account001-004: The system shall allow a user to submit an Account creation request to the appropriate Account Administrator(s) inside the CRM system. (Step 3a)
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	N/A

Use Case ID	Account002
Use Case Name	Account Administrator creates and verifies an Account
Use Case Description	To create and verify a new Account in the CRM system.
Actor(s)	SHARE Account Administrator, SHARE Country Administrator
Business Partner	No
Trigger(s)	Account Administrator receives a request to create a new Account.
Pre-Conditions	1. Admin has access to Accounts. 2. Admin is authorized to create new Accounts. 3. Admin is authorized to verify Accounts.
Post-Conditions	1. A new Account exists in the CRM system. 2. The new Account is verified.
Assumptions	1. A process for verifying Accounts exists, and includes: a. Verifying that the Account is not a duplicate b. Verifying the Account's credit rating c. Verifying that the Account is not embargoed d. Verifying that the Account exists e. Verifying that the Account is a potential customer
Normal Flow	1. Admin navigates to a list of Accounts. 2. System displays a list of Accounts. 3. Admin initiates Account creation. 4. System displays relevant fields for Account creation. 5. Admin values relevant fields for Account creation. 6. System validates that the Account's address is valid and no similar Accounts already exist in the CRM system and creates the Account. 7. Admin marks Account as verified, notifies requester appropriately, and closes Account creation request as appropriate.
Alternative Flow 1	**Account Address is not valid; admin accepts suggested change** 6a. System determines that the Account's address is not valid, and presents suggested address correction to admin. 7a. Admin accepts system's suggested address correction. 8a. System creates Account. 9a. Admin marks Account as verified, notifies requester appropriately, and closes Account creation request as appropriate.
Alternative Flow 2	**Similar Account(s) exist; admin accepts similar Account; requester already has access to similar Account** 6b. System determines that one or more similar Account(s) already exist in the CRM system, and suggests the similar Account(s) to admin. 7b. Admin accepts one of the systems suggested Account(s). 8b. System cancels Account creation process. 9b. Admin notifies requester appropriately and closes Account creation request as appropriate.
Alternative Flow 3	**Account Address is not valid; admin overrides suggested change** 6c. System determines that the Account's address is not valid, and presents suggested Address correction to admin.

	7c. Admin overrides system's suggested Address correction. 8c. System creates Account. 9c. Admin marks Account as verified and notifies requester appropriately, and closes Account creation request as appropriate.
Alternative Flow 4	**Similar Account exists; admin accepts similar Account; requester does not have access to similar Account** 6d. System determines that one or more similar Account(s) already exist in the CRM system, and suggests the similar Account(s) to admin. 7d. Admin accepts one of the systems suggested Account(s). 8d. System cancels Account creation process. 9d. Admin notifies requester appropriately, closes Account creation request as appropriate and optionally initiates Account Team Assignment.
Alternative Flow 5	**Similar Account exists; admin proceeds with Account creation** 6e. System determines that one or more similar Account(s) already exist in the CRM system, and suggests the similar Account(s) to admin. 7e. Admin determines that the Account is not a duplicate and intentionally proceeds with Account creation. 8e. System creates Account. 9e. Admin marks Account as verified, notifies requester appropriately, and closes Account creation request as appropriate.
Requirements	FR Account002-001: The system shall allow an administrator to create a new account. [Step 3] FR Account002-002: The system shall display a list of similar accounts in the user's country. [Step 6] FR Account002-003: The system shall allow an administrator to mark an Account as verified. [Step 7] FR Account002-004: The system shall inform an administrator if an address is invalid. [Step 6a] FR Account002-005: The system shall allow an administrator to override suggested address information. [Step 7c] FR Account002-006: The system shall allow an administrator to apply suggested address information. [Step 7a] FR Account002-007: The system shall allow an administrator to accept a suggested Account and to cancel the account creation process. [Step 7b] FR Account002-008: The system shall not run territory assignment for unverified accounts. [Step 6]

	FR Account002-009: The system shall allow an administrator to inform a requester, either within the CRM system or externally, of the status of the requester's account creation request. [Step 7] FR Account002-010: The system shall allow an administrator to drill into a suggested similar account if the user has visibility to the account. [Step 6b] FR Account002-011: The system shall allow an administrator to create a duplicate account. [Step 7e] FR Accounts002-012: The system shall allow an Administrator to close completed system-internal Account creation requests. [Step 7]
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	N/A

Use Case ID	Account003
Use Case Name	Update an existing Account
Use Case Description	To update an existing Account in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Remote Sales Support, Key Account Manager, SHARE Account Administrator, SHARE Country Administrator
Business Partner	Yes
Trigger(s)	A user determines that an update must be made to an Account that already exists in the CRM system.
Pre-Conditions	1. The Account to be updated already exists in the CRM system. 2. The user has access to the Account that will be updated. 3. The user is authorized to update the Account that will be updated.
Post-Conditions	1. An Account has been updated and/or a request for administrator updates has been submitted to an Account administrator.
Assumptions	1. User can navigate to the Account to be updated by linking on the Account from within the CRM system or by navigating to it directly. 2. Some Account information can be updated by a normal user, and some Account information can only be updated by an administrator. Example: Account Address. 3. A relationship or association is established appropriately between the Account and any records that are created from it during this Use Case.
Normal Flow	1. User navigates to the Account to be updated. 2. System displays details about the Account to be updated. 3. User updates Account details and optionally: a. Associates the Account to one or more Contacts. b. Establishes and/or maintains a relationship between the Account and one or more: i. Accounts (See UC Accounts005, Accounts006, and Accounts007) ii. Contacts c. Creates one or more: i. Contacts ii. Opportunities iii. Appointments iv. Tasks v. Competitor Installed Base Systems vi. Leads 4. System accepts user’s updates and displays updated Account details.
Alternative Flow 1	**User wishes to update Account information that can only be updated by an administrator, initiates an update request from within the CRM system, and submits the update request through an external system** 3a. User initiates update request from within the CRM system.

	4a. CRM system navigates user to external system. 5a. User provides relevant information and submits update request through external system.
Alternative Flow 2	**User wishes to update Account information that can only be updated by an administrator, initiates an update request from within the CRM system, and submits the update request through the CRM system** 3b. User initiates update request from within the CRM system. 4b. CRM system allows user to enter relevant information. 5b. User provides relevant information and submits update request through CRM system.
Requirements	FR Account003-001: The system shall indicate to a user which fields on an account s/he is authorized to update. [Step 2] FR Account003-002: The system shall allow a user to submit an Account update request from within the CRM system. [Step 5b] FR Account003-003: The system shall prevent a business partner from updating accounts, but shall still allow a business partner to submit update requests for an account's information. [Step 2] FR Account003-004: The system shall display an overview for a selected Account that summarizes key information and allows a user to navigate to related items for that Account. [Step 2] FR Account003-005: The system shall allow a user to initiate an Account update request. [Step 3a] FR Account003-006: The system shall route a user to the appropriate external system in order to initiate an Account update request. [Step 4a] FR Account003-007: The system shall allow a user to enter relevant information for an Account update request. [Step 4b] FR Account003-008: The system shall prevent a business partner from viewing accounts that s/he is not assigned to. [Step 1] FR Account003-009: The system shall allow a user to submit an access request for an Account. [Step 1] FR Account003-010: The system shall allow a user to associate an Account to one or more Contacts. [Step 3] FR Account003-011: The system shall allow a user to create one or more Contacts, Opportunities, Appointments, Tasks, Competitor Installed Base Systems, and/or Leads from an Account. [Step 3]

	FR Account003-012: The system shall automatically associate an Account to any records that are created from it. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Account002-004: The system shall inform an administrator if an address is invalid. [Step 3] FR Account002-005: The system shall allow an administrator to override suggested address information. [Step 3] FR Account002-006: The system shall allow an administrator to apply suggested address information. [Step 3]

Use Case ID	Account004
Use Case Name	Verify and apply requested updates to Accounts in the CRM system.
Use Case Description	To verify and apply requested updates to Accounts in the CRM system.
Actor(s)	SHARE Account Administrator, SHARE Country Administrator
Business Partner	No
Trigger(s)	An Account update request has been received by an Administrator.
Pre-Conditions	1. Admin is authorized to update the Account that will be updated.
Post-Conditions	1. An Account update request has been closed. 2. The user who submitted the Account update request has been notified appropriately. 3. Approved changes have been applied to an Account in the CRM system.
Assumptions	1. A manual process for verifying Account update requests exists outside the CRM system.
Normal Flow	1. Admin receives an Account update request and navigates to the Account to be updated in the CRM system. 2. System displays details about the Account to be updated. 3. Admin compares Account details to Account update request, decides that some parts or the entire update request can be approved, and applies approved changes to the Account. 4. System stores updated Account information. 5. Admin closes Account update request and notifies the requester appropriately.
Alternative Flow 1	**User determines that no changes in Account update request can be approved** 3a. Admin compares Account details to Account update request, decides that no changes in the update request can be approved, closes the update request, and notifies the requester appropriately.

Requirements	FR Accounts004-001: The system shall display a list of open system-internal Account update requests. [Step 1] FR Accounts004-002: The system shall display additional information about a system-internal Account update request and its associated Account. [Step 2] FR Accounts004-003: The system shall allow an Administrator to close completed system-internal Account update requests. [Step 5] FR Accounts004-004: The system shall allow an Administrator to notify the user who originally submitted a system-internal Account update request when the request is closed. [Step 5] FR Accounts004-005: The system shall prevent an administrator from approving or rejecting account update requests for accounts s/he does not own. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Account003-001: The system shall indicate to a user which fields on an account s/he is authorized to update. [Step 2] FR Account003-004: The system shall display an overview for a selected Account that summarizes key information and allows a user to navigate to related items for that Account. [Step 2]
Notes and Issues	Internal note: Investigate and document the business logic that applies to an Account and its related records when it is marked inactive or marked for deletion.

Use Case ID	Accounts005
Use Case Name	Maintain an Account's legal / ownership relationships
Use Case Description	To maintain the legal / ownership relationship for two Accounts in the CRM system (for example, establishing a legal / ownership hierarchy between all Accounts that belong to Rhoen Klinikum AG).
Actor(s)	SHARE Account Administrator, SHARE Country Administrator
Business Partner	No
Trigger(s)	An admin determines that an update must be made to the legal / ownership relationship(s) for an Account in the CRM system.
Pre-Conditions	1. The Account to be updated already exists in the CRM system. 2. The admin has access to the Account that will be updated. 3. The admin is authorized to update the legal / ownership relationships for the Account that will be updated.
Post-Conditions	1. The legal / ownership relationship(s) for an Account have been updated in the CRM system.
Assumptions	1. A legal / ownership relationship is a direct relationship between two Accounts that are legally associated with / owned by each other. 2. Admin can navigate to the Account to be updated by linking on the Account from within the CRM system or by navigating to it directly.
Normal Flow	1. Admin navigates to the Account that will be updated. 2. System displays details about the Account and its existing legal / ownership relationships. 3. Admin updates the Account's legal / ownership relationship(s). 4. System accepts admin's updates and displays updated Account relationship details.
Requirements	FR Account005-001: The system shall display a legal / ownership hierarchy of Accounts related to a selected Account. [Step 2] FR Account005-002: The system shall display aggregated data that a user has access to for each level displayed in the legal / ownership hierarchy of Accounts. [Step 2] FR Account005-003: The system shall allow a user to navigate to any Account displayed in the legal / ownership hierarchy of Accounts that s/he has access to. [Step 2] FR Account005-004: The system shall allow an Account to have up to one parent Account in the legal / ownership hierarchy. [Step 2] FR Account005-005: The system shall allow an Account to have any number of child Accounts in the legal / ownership hierarchy. [Step 2] FR Account005-006: The system shall allow an admin to associate an

	Account to only one Account in a Parent Relationship. [Step 2] FR Account005-007: The system shall allow an admin to associate an Account to one or more child Accounts. [Step 2] FR Account005-008: The system shall allow an admin to maintain a legal / ownership relationship between two Accounts from either of the Accounts in the relationship. [Step 3] FR Account005-009: The system shall allow a user to review when a relationship starts and ends. [Step 2]
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	• Since the healthcare market is consolidating rapidly, business requires tracking legal / ownership relationships over time. For example, to track whether the increase in revenue Siemens Healthcare made with a customer compared to previous year is a result of organic or inorganic growth over time. • Need to ensure that SAP, OSC, and C-P-Q are in sync at least to some level for all accounts and their relationships to other Accounts.

Use Case ID	Accounts006
Use Case Name	Maintain an Account's network relationships
Use Case Description	To maintain the network relationship for an Account in the CRM system (for example, establishing a non-legal network of relationships for the Accounts that are members of the same GPO).
Actor(s)	SHARE Account Administrator, SHARE Country Administrator
Business Partner	No
Trigger(s)	An admin determines that an update must be made to the network relationship(s) for an Account in the CRM system.
Pre-Conditions	1. The Account to be updated already exists in the CRM system. 2. The admin has access to the Account that will be updated. 3. The admin is authorized to update the network relationships for the Account that will be updated.
Post-Conditions	1. The network relationship(s) for an Account have been updated in the CRM system.
Assumptions	1. A network relationship is a non-legal / non-ownership relationship between an Account and a network. An Account can have relationships with many networks, and a network can have relationships with many Accounts. A GPO is an example of a network, and a GPO's relationship with an individual member Account is an example of a network relationship. 2. Admin can navigate to the Account to be updated by linking on the Account from within the CRM system or by navigating to it directly.
Normal Flow	1. Admin navigates to the Account that will be updated. 2. System displays details about the Account and its existing network relationships. 3. Admin updates the Account's relationship(s) to network(s). 4. System accepts user's updates and displays updated Account network relationship details.
Alternative Course 1	**Admin maintains a network's relationship(s)** 1a. Admin navigates to the network that will be updated. 2a. System displays details about the network and its existing relationship(s) to Account(s). 3a. Admin updates the network's relationship(s) to Account(s). 4a. System accepts user's updates and displays updated network relationship details.
Requirements	FR Account006-001: The system shall allow an admin to maintain an Account's relationships to networks. [Step 3] FR Account006-002: The system shall allow an Account to belong to any number of networks. [Step 3] FR Account006-003: The system shall allow an admin to establish a network relationship between an Account and one or more networks. [Step 3]

	FR Account006-004: The system shall allow an admin to maintain a network's relationships to Accounts. [Step 3a] FR Account006-005: The system shall allow an admin to maintain details for individual network relationships. [Step 3] FR Account006-006: The system shall allow a user to review the existing relationships for a selected Network. [Step 2a] FR Account006-007: The system shall allow a user to review the existing network relationships for a selected account. [Step 2] FR Account006-008: The system shall display a visual representation of an Account's network relationships. [Step 2]
Requirements from other Use Cases that apply to this Use Case	FR Account005-009: The system shall allow a user to review when a relationship starts and ends. [Step 2]
Notes and Issues	Need to ensure that SAP, OSC, and C-P-Q are in synch at least to some level for GPO relationships.

Use Case ID	Accounts007
Use Case Name	Maintain an Account's non-legal Account-to-Account relationships
Use Case Description	To maintain the non-legal Account-to-Account relationships for an Account in the CRM system (for example, a lab that is owned by Hospital A but operated by External Vendor B has a non-legal Account-to-Account relationship to External Vendor B).
Actor(s)	SHARE Account Administrator, SHARE Country Administrator
Business Partner	No
Trigger(s)	An admin determines that an update must be made to the non-legal Account-to-Account relationship(s) for an Account in the CRM system.
Pre-Conditions	1. The Accounts to be updated already exist in the CRM system. 2. The admin has access to the Accounts that will be updated. 3. The admin is authorized to update the non-legal Account-to-Account relationships for the Accounts that will be updated.
Post-Conditions	1. The non-legal Account-to-Account relationship(s) for two Accounts have been updated in the CRM system.
Assumptions	1. A non-legal Account-to-Account relationship is a non-legal relationship between two Accounts. An Account can have multiple non-legal Account-to-Account relationships; that is, this type of relationship is many-to-many. For example, a lab that is owned by Hospital A but operated by External Vendor B has a non-legal Account-to-Account relationship to External Vendor B. 2. Admin can navigate to the Account to be updated by linking on the Account from within the CRM system or by navigating to it directly.
Normal Flow	1. Admin navigates to the Account that will be updated. 2. System displays details about the Account and its existing non-legal Account-to-Account relationships. 3. Admin updates the Account's non-legal Account-to-Account relationship(s). 4. System accepts admin's updates and displays updated Account non-legal Account-to-Account relationship details.
Requirements	FR Account007-001: The system shall allow an admin to maintain an Account's non-legal Account-to-Account relationships. [Step 3] FR Account007-002: The system shall allow an Account to have any number of non-legal Account-to-Account relationships. [Step 3] FR Account007-003: The system shall allow an admin to maintain details for individual non-legal-Account-to-Account relationships. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Account005-009: The system shall allow a user to review when a relationship starts and ends. [Step 2]
Notes and Issues	Need to ensure that SAP, OSC, and C-P-Q are in synch at least to some level for all accounts and their relationships to other Accounts.

Use Case ID	Accounts008
Use Case Name	Maintain an Account's business plan
Use Case Description	To maintain the business plan (a strategic document that describes Siemens Healthcare's overall sales strategy for a customer) for an Account in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Remote Sales Support, Key Account Manager, SHARE Account Administrator, SHARE Country Administrator
Business Partner	Yes
Trigger(s)	A user determines that the business plan for an Account must be maintained in the CRM system.
Pre-Conditions	1. The Account that a business plan will be maintained for already exists in the CRM system. 2. The user has access to the Account that a business plan will be maintained for. 3. The user is authorized to maintain business plans for the Account that will be updated.
Post-Conditions	1. The business plan for an Account in the CRM system has been created and/or maintained.
Assumptions	1. The business plan is a MS PowerPoint template that originates outside the CRM system. 2. The template includes manual content and embedded reports with data directly from the CRM system. 3. Different countries will have different templates. 4. Business plans require data from multiple data sources (internal and external to the CRM system). 5. User can navigate to the Account to be updated by linking on the Account from within the CRM system or by navigating to it directly. 6. A business partner may have its own business plan for an Account in the CRM system.
Normal Flow	1. User navigates to the Account that a business plan will be created for. 2. System displays details about the Account and its existing business plans. 3. User creates a new Account business plan using a template, and optionally: a. Modifies the business plan's content manually b. Modifies the business plan's format manually c. Maintains embedded reports within the business plan 4. System displays updated details for the business plan that was updated. 5. User chooses whether to save newly-created business plan or cancel business plan creation. 6. System accepts user's updates and displays updated details about the Account and its existing business plans.
Alternative Course 1	**User maintains an existing business plan for an Account** 3a. User selects an existing business plan for the Account, and op-

	tionally: a. Modifies the business plan's content manually b. Modifies the business plan's format manually c. Maintains embedded reports within the business plan d. Triggers a manual refresh of the embedded reports within the business plan 4a. System displays updated details for the business plan that was updated. 5a. User chooses whether to store updates by overwriting existing business plan, store updates by creating a new business plan, or cancel business plan updates. 6a. System accepts user's updates and displays updated details about the Account and its existing business plans.
Alternative Course 2	**User deletes an existing business plan for an Account** 3b. User selects an existing business plan for the Account and deletes it. 4b. System deletes the existing business plan and displays updated details about the Account and its existing business plans.
Requirements	FR Account008-001: The system shall allow an authorized user to create a new Account business plan. [Step 3] FR Account008-002: The system shall allow an authorized user to manually maintain the data within an Account's business plan. [Step 3] FR Account008-003: The system shall allow a user to manually maintain the embedded reports he is authorized to maintain within an Account's business plan. [Step 3] FR Account008-004: The system shall allow authorized users to maintain the format of the business plan for an Account. [Step 3] FR Account008-005: The system shall allow an authorized user to define filter criteria for the data that is displayed within a business plan. [Step 3] FR Account008-006: The system shall allow a user to review his updates to a business plan prior to saving it. [Step 5] FR Account008-007: The system shall allow a user to cancel the creation or update of a business plan. [Step 5] FR Account008-008: The system shall allow a user to manually refresh the embedded reports within a business plan. [Step 3a] FR Account008-009: The system shall not automatically refresh the embedded reports within a business plan. [Step 3a]

	FR Account008-010: The system shall allow an Account to have multiple business plans. [Step 5a] FR Account008-011: The system shall allow a user to choose whether to save updates to a business plan by overwriting an existing business plan or creating a new business plan. [Step 5a] FR Account008-012: The system shall allow a user to delete a business plan for an Account. [Step 3b] FR Account008-013: The system shall allow a business plan for an Account to be locked and unlocked by its owner. [Step 3]
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	N/A

Use Case ID	Accounts009
Use Case Name	Account Administrator merges Accounts
Use Case Description	To merge two Accounts (including their child records, attachments, and all associated data) in the CRM system.
Actor(s)	SHARE Account Administrator, SHARE Country Administrator, SHARE System Administrator
Business Partner	No
Trigger(s)	An admin determines that two Accounts must be merged in the CRM system.
Pre-Conditions	1. The Accounts that will be merged exist in the CRM system. 2. The admin has access to the Accounts that will be merged. 3. The admin is authorized merge Accounts in the CRM system.
Post-Conditions	1. Two Accounts have been merged in the CRM system.
Assumptions	N/A
Normal Flow	1. Admin selects two Accounts to merge and initiates Account merge process. 2. System previews results of merge process and displays a list of conflicts that need to be resolved. 3. Admin reviews preview of results of merge process, resolves conflicts, and confirms Account merge. 4. System merges Accounts, their associated records, and all of their attributes according to defined rules and admin's conflict resolution decisions.
Requirements	FR Account009-001: The system shall allow an admin to merge Accounts. [Step 1] FR Account009-002: The system shall allow an admin to review and confirm the predicted results of a merge prior to performing a merge. [Step 2] FR Account 009-003: The system shall allow an admin to review and resolve any conflicts associated with a merge prior to performing a merge. [Step 3] FR Account009-004: The system shall merge Accounts, their associated records, and all data related to the Accounts and their associated records according to predefined rules and an admin's conflict resolution decisions during a merge. [Step 4] FR Account009-005: The system shall remove the "losing" Account after a merge takes place. [Step 4]
Requirements from other Use Cases that apply to this Use Case	N/A

Notes and Issues	N/A

4.2. Activities

An important aspect in CRM is to keep track of all the customer-related and/or internal Activities, e.g. tasks, meetings, calls, events, etc. This is very useful in initiating and tracking pending action items and in recording the results of meetings or events.

Activities can be either time bound calendar events, such as meetings, customer site visits, appointments, etc., or status bound tasks, such as create a quote for Sales Rep, send email to customer, etc.

Use Case ID	Activities001
Use Case Name	Create a new Appointment
Use Case Description	To create a new Appointment in the CRM system. An Appointment is a calendar entry for a customer-related interaction, and can be created as either prospective planning or retrospective documentation.
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	User determines that a new Appointment should be created in the CRM system in order to: 1. Document a customer-related interaction 2. Plan for a customer-related interaction
Pre-Conditions	1. User has access to Appointments. 2. User is authorized to create new Appointments. 3. User has navigated to a location in the CRM system where Appointments can be created.
Post-Conditions	1. A new Appointment exists in the CRM system. 2. A calendar entry for the new Appointment has been created in the calendar in the CRM system. 3. The new Appointment has optionally been synchronized between the CRM system and the user's Outlook application. 4. An Outlook calendar invitation has optionally been sent to any assigned internal employee(s) and/or Contact(s).
Assumptions	N/A
Normal Flow	1. User initiates Appointment creation. 2. System displays relevant fields. 3. User values relevant fields and optionally: a. Associates Appointment to a single: i. Account ii. Opportunity iii. Lead iv. Project b. Associates Appointment to one or more Contact(s) c. Executes UC Activities002 (Assign an Appointment to one or more internal employee(s)) 4. System stores Appointment and optionally synchronizes it between the CRM system and the user's Outlook application.

	5. User optionally informs associated Contacts and/or internal employees of Appointment.
Requirements	FR Activities001-001: The system shall allow a user to associate an Appointment to a single Account, Opportunity, Lead, and Project, and to one or more Contact(s). [Step 3] FR Activities001-002: The system shall allow a user to create an Appointment both in the CRM tool and in the Outlook application. [Step 1] FR Activities001-003: The system shall synchronize a user's Appointments between the CRM tool and the user's Outlook application. [Step 4] FR Activities001-004: The system shall allow a user to choose whether an Appointment is synchronized between the CRM tool and the user's Outlook application. [Step 4] FR Activities001-005: The system shall allow a user to create a calendar entry for an Appointment in the CRM tool. [Step 5] FR Activities001-006: The system shall allow a user to send an Outlook calendar invitation for a new or updated Appointment to the Contact(s) associated to that Appointment. [Step 5] FR Activities001-007: The system shall allow a user to send an internal notification for a new or updated Appointment to the internal employee(s) associated to that Appointment. [Step 5]
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	N/A

Use Case ID	Activities002
Use Case Name	Assign an Appointment to one or more internal employee(s)
Use Case Description	To change an Appointment's internal employee assignment in the CRM system. An Appointment is a calendar entry for a customer-related interaction, and can be created as either prospective planning or retro-spective documentation.
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	User determines that an Appointment's internal employee assignment should be changed in the CRM system.
Pre-Conditions	1. User has access to Appointments. 2. User is authorized to change internal employee assignment for the Appointment that will be modified. 3. User has navigated to a location in the CRM system where an Appointment's internal employee assignment can be modified.
Post-Conditions	1. An Appointment's internal employee assignment has been modified in the CRM system. 2. Newly-assigned users have optionally been notified. 3. An Outlook calendar invitation has optionally been sent or up-dated for internal employee(s) affected by the Appointment's assignment change. 4. The Appointment has optionally been synchronized between the user's Outlook application and the CRM system.
Assumptions	1. In this use case, the term "internal employees" also includes business partners that have an active user account for our CRM system.
Normal Flow	1. User selects Appointment to Assign. 2. System displays detailed information about Appointment. 3. User changes Appointment's assignment for one or more inter-nal employees and optionally chooses to inform them of Ap-pointment. 4. System stores changes to Appointment assignment and notifies associated internal employee(s) appropriately.
Requirements	FR Activities002-001: The system shall allow a user to change the in-ternal employees who are associated to an Appointment. [Step 3] FR Activities002-002: The system shall allow a user to notify internal employees who are affected by changes to an Appointment's assign-ment. [Step 4]
Requirements from oth-er Use Cases that apply to this Use Case	FR Activities001-007: The system shall allow a user to send an internal notification for a new or updated Appointment to the internal employ-ee(s) associated to that Appointment. [Step 4]
Notes and Issues	N/A

Use Case ID	Activities003
Use Case Name	Update an Appointment
Use Case Description	To update an Appointment in the CRM system. An Appointment is a calendar entry for a customer-related interaction, and can be created as either prospective planning or retrospective documentation.
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	User determines that an Appointment should be updated in the CRM system.
Pre-Conditions	1. User has access to Appointments. 2. User is authorized to update the Appointment that will be modified. 3. User has navigated to a location in the CRM system where Appointments can be updated.
Post-Conditions	1. An Appointment has been updated in the CRM system. 2. The calendar entry for the Appointment has been updated in the calendar in the CRM system. 3. If appropriate, the updated Appointment has been synchronized between the CRM system and the user's Outlook application. 4. An updated Outlook calendar invitation has optionally been sent to any assigned internal employee(s) and/or Contact(s).
Assumptions	1. An association is established appropriately between the Activity and any records that are created from it during this Use Case.
Normal Flow	1. User selects Appointment to update. 2. System displays detailed information about Appointment. 3. User maintains relevant fields, and optionally: a. Associates or dissociates the Appointment to one: i. Account ii. Opportunity iii. Lead iv. Project b. Associates or dissociates the Appointment to one or more Contact(s). c. Creates one of the following types of records from the Appointment: i. Opportunity ii. Lead iii. Project d. Creates one or more Contact(s) from the Appointment. 4. System stores changes to Appointment and synchronizes updated Appointment between the CRM system and the user's Outlook application appropriately. 5. User optionally: a. Notifies associated Contacts

	b. Notifies associated internal employees c. Creates a follow-up Appointment
Requirements	FR Activities002-001: The system shall allow a user to update an existing Appointment. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Activities001-001: The system shall allow a user to associate an Appointment to a single Account, Opportunity, Lead, and Project, and to one or more Contact(s). [Step 3] FR Activities001-003: The system shall synchronize a user's Appointments between the CRM tool and the user's Outlook application. [Step 4] FR Activities001-004: The system shall allow a user to choose whether an Appointment is synchronized between the CRM tool and the user's Outlook application. [Step 4] FR Activities001-005: The system shall allow a user to create a calendar entry for an Appointment in the CRM tool. [Step 3] FR Activities001-006: The system shall allow a user to send an Outlook calendar invitation for a new or updated Appointment to the Contact(s) associated to that Appointment. [Step 5] FR Activities001-007: The system shall allow a user to send an internal notification for a new or updated Appointment to the internal employee(s) associated to that Appointment. [Step 5]
Notes and Issues	N/A

Use Case ID	Activities004
Use Case Name	Create a new Task
Use Case Description	To create a new Task in the CRM system. A Task is a to-do list item for the user herself or another internal employee, and typically tracks internal CRM tasks (Quote creation requests, Account creation requests, meeting preparation requests, etc.).
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	User determines that a new Task should be created in the CRM system.
Pre-Conditions	1. User has access to Tasks. 2. User is authorized to create new Tasks. 3. User has navigated to a location in the CRM system where Tasks can be created.
Post-Conditions	1. A new Task exists in the CRM system. 2. The new Task has optionally been synchronized between the CRM system and the user's Outlook application.
Assumptions	1. An association is established appropriately between the Activity and any records that are created from it during this Use Case.
Normal Flow	1. User initiates Task creation. 2. System displays relevant fields. 3. User values relevant fields and optionally: a. Associates Task to a single: i. Account ii. Opportunity iii. Lead iv. Project v. Competitor Installed Base System vi. Siemens Installed Base System b. Associates Task to one or more Contact(s) c. Executes UC Activities005 (Assign a Task to one or more internal employees) 4. System stores Task and optionally synchronizes it between the CRM system and the user's Outlook application. 5. User optionally informs internal employees of Task.
Requirements	FR Activities004-001: The system shall allow a user to associate a Task to a single Account, Opportunity, Lead, Project, Competitor Installed Base System, or Siemens Installed Base System, and to one or more Contact(s). [Step 3] FR Activities004-002: The system shall allow a user to create a Task both in the CRM tool and in the Outlook application. [Step 1] FR Activities004-003: The system shall synchronize a user's Tasks between the CRM tool and the user's Outlook application. [Step 4]

	FR Activities004-004: The system shall allow a user to choose whether a Task is synchronized between the CRM tool and the user's Outlook application. [Step 4] FR Activities004-005: The system shall allow a user to send an internal notification for a Task to the internal employee(s) associated to that Task. [Step 5] FR Activities004-006: The system shall allow a user to create a single Opportunity, Lead, or Project, or one or more Contact(s), from a Task. [Step 3]
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	N/A

Use Case ID	Activities005
Use Case Name	Assign a Task to one or more internal employee(s)
Use Case Description	To assign responsibility for completing a Task to an internal employee in the CRM system. A Task is a to-do list item for the user herself or another internal employee, and typically tracks internal CRM tasks (Quote creation requests, Account creation requests, meeting preparation requests, etc.).
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	User determines that a Task's internal employee assignment should be changed in the CRM system.
Pre-Conditions	1. User has access to Tasks. 2. User is authorized to change internal employee assignment for the Task that will be modified. 3. User has navigated to a location in the CRM system where a Task internal employee assignment can be modified.
Post-Conditions	1. A Task's internal employee assignment has been modified in the CRM system. 2. Newly-assigned users have optionally been notified. 3. The Task has optionally been synchronized between the user's Outlook application and the CRM system.
Assumptions	N/A
Normal Flow	1. User selects Task to Assign. 2. System displays detailed information about Task. 3. User changes Task's assignment for one or more internal employees and optionally chooses to inform them of Task. 4. System stores changes to Task assignment and notifies associated internal employee(s) appropriately.
Requirements	FR Activities005-001: The system shall allow a user to change the internal employees who are associated to a Task. [Step 3] FR Activities005-002: The system shall allow a user to notify internal employees who are affected by changes to a Task's assignment. [Step 4] FR Activities005-003: The system shall allow Tasks to be assigned to a queue. [Step 3] FR Activities005-004: The system shall allow authorized users to take ownership of Tasks from a queue. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Activities004-005: The system shall allow a user to send an internal notification for a Task to the internal employee(s) associated to that Task. [Step 4]
Notes and Issues	N/A

Use Case ID	Activities006
Use Case Name	Update a Task
Use Case Description	To update (and optionally mark complete) a Task in the CRM system. A Task is a to-do list item for the user herself or another internal employee, and typically tracks internal CRM tasks (Quote creation requests, Account creation requests, meeting preparation requests, etc.).
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	User determines that a Task should be updated in the CRM system.
Pre-Conditions	1. User has access to Tasks. 2. User is authorized to update the Task that will be modified. 3. User has navigated to a location in the CRM system where Tasks can be updated.
Post-Conditions	1. A Task has been updated in the CRM system. 2. If appropriate, the updated Task has been synchronized between the CRM system and the user's Outlook application. 3. A notification within the CRM system has been optionally sent to any internal employee(s) who are assigned to the Task.
Assumptions	1. An association is established appropriately between the Task and any records that are created from it during this Use Case.
Normal Flow	1. User selects Task to update. 2. System displays detailed information about Task. 3. User maintains relevant fields, and optionally: a. Associates or dissociates the Task to one: i. Account ii. Opportunity iii. Lead iv. Project v. Competitor Installed Base System vi. Siemens Installed Base System b. Associates or dissociates the Task to one or more Contact(s). c. Creates one of the following types of records from the Task: i. Opportunity ii. Lead iii. Project d. Creates one or more Contact(s) from the Task. 4. System stores changes to Task and synchronizes updated Task between the CRM system and the user's Outlook application appropriately. 5. User optionally: a. Notifies associated internal employees b. Creates a follow-up Task

Requirements	FR Activities006-001: The system shall allow a user to update an existing Task.
Requirements from other Use Cases that apply to this Use Case	FR Activities004-001: The system shall allow a user to associate a Task to a single Account, Opportunity, Lead, Project, Competitor Installed Base System, or Siemens Installed Base System, and to one or more Contact(s). [Step 3] FR Activities004-003: The system shall synchronize a user's Tasks between the CRM tool and the user's Outlook application. [Step 4] FR Activities004-004: The system shall allow a user to choose whether a Task is synchronized between the CRM tool and the user's Outlook application. [Step 4] FR Activities004-005: The system shall allow a user to send an internal notification for a Task to the internal employee(s) associated to that Task. [Step 5] FR Activities004-006: The system shall allow a user to create a single Opportunity, Lead, or Project, or one or more Contact(s), from a Task. [Step 3]
Notes and Issues	N/A

4.3. Contacts

A Contact describes an individual who is related to at least one Account (for example, the Head of Radiology of a hospital). A contact may also be a person from a third party who is involved in a business transaction, such as a hospital's external supply chain management consultant.

Use Case ID	Contacts001
Use Case Name	Create a Contact
Use Case Description	To create a Contact in the CRM system.
Actor(s)	Key Account Manager, IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Sales Manager, DX Sales Manager, Service Sales and Business Manager, IM/CP Business Manager, DX Business Manager, IM/CP Product Specialist, DX Product Specialist, Remote Sales Support, Back Office Specialist
Business Partner	Yes
Trigger(s)	A user determines that a Contact should be created in the CRM system.
Pre-Conditions	1. The user is authorized to create Contacts in the CRM system. 2. The user is in a location that allows the creation of Contacts in the CRM system.
Post-Conditions	1. A new Contact exists, is associated to an Account, and is optionally associated to one other record (an Opportunity, Activity, etc.) which it was created from in the CRM system.
Assumptions	N/A
Normal Flow	1. User initiates Contact creation. 2. System displays relevant fields. 3. User values relevant fields and associates Contact to one or more Accounts. 4. System accepts user's updates and stores the new Contact.
Alternative Flow 1	**User creates Contact from another record (an Opportunity, Activity, etc.) in the CRM system** 1a. User navigates to a non-Contact record in the CRM system which allows the creation of a Contact (an Opportunity, Activity, etc.) and initiates Contact creation. 2a. System displays relevant fields. 3a. User values relevant fields. 4a. System accepts user's updates, stores the new Contact, and associates it to the record that it was created from and to that record's Account.
Requirements	FR Contacts001-001: The system shall allow a user to create a Contact. [Step 1] FR Contacts001-002: The system shall require a Contact to always be associated to at least one Account. [Step 3]

	FR Contacts001-003: The system shall allow a user to create a Contact from any record in the CRM system to which a Contact can be associated. [Step 1a] FR Contacts001-004: The system shall automatically associate a Contact that is created from another record to both the record and to the record's Account.
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	Field level: Include marketing attributes as field requirement.

<table>
<tr><th>Use Case ID</th><th>Contacts002</th></tr>
<tr><td>Use Case Name</td><td>Maintain a Contact</td></tr>
<tr><td>Use Case Description</td><td>To maintain a Contact in the CRM system.</td></tr>
<tr><td>Actor(s)</td><td>Key Account Manager, IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Sales Manager, DX Sales Manager, Service Sales and Business Manager, IM/CP Business Manager, DX Business Manager, IM/CP Product Specialist, DX Product Specialist, Remote Sales Support, Back Office Specialist</td></tr>
<tr><td>Business Partner</td><td>Yes</td></tr>
<tr><td>Trigger(s)</td><td>A user determines that a Contact should be updated or deactivated in the CRM system.</td></tr>
<tr><td>Pre-Conditions</td><td>1. The user is authorized to maintain Contacts in the CRM system.
2. The user is in a location that allows the maintenance of Contacts in the CRM system.</td></tr>
<tr><td>Post-Conditions</td><td>1. An existing Contact has been updated and/or deactivated in the CRM system.</td></tr>
<tr><td>Assumptions</td><td>1. An association is a link between a Contact and an Account, Siemens Installed Base System, Competitor Installed Base System, Opportunity, Appointment, Task, or Lead.
a. For example, an Appointment documenting a meeting with a customer representative can have the customer representative associated to it as a Contact.
2. A relationship is a link that contains additional information specific to that link between a Contact and another Contact, an Account, or a Siemens or Competitor Installed Base System.
a. An Account can have a Contact linked to it with additional information describing that Contact’s role at the Account (chief cardiologist, head of purchasing, etc.).
b. A Contact can be linked to another Contact that it is influenced by (a doctor who is heavily influenced by a colleague from another hospital).
c. A Contact can be linked to a Siemens and/or Competitor Installed Base system that it is responsible for.
3. A relationship or association is established appropriately between the Contact and any records that are created from it during this Use Case.</td></tr>
<tr><td>Normal Flow</td><td>1. User initiates Contact maintenance.
2. System displays relevant fields.
3. User maintains relevant fields and optionally:
a. Associates or dissociates a Contact to one or more:
i. Accounts
ii. Competitor Installed Base Systems
iii. Siemens Installed Base Systems
b. Establishes and/or maintains a relationship between the Contact and one more:
i. Other Contacts
ii. Accounts
iii. Competitor Installed Base Systems</td></tr>
</table>

	iv. Siemens Installed Base Systems v. Opportunities c. Creates one or more of the following types of records from the Contact: i. Opportunity ii. Task iii. Appointment iv. Lead d. Deactivates the Contact e. Reactivates the Contact 4. System accepts user's updates and displays updated Contact information.
Requirements	FR Contacts002-001: The system shall allow a user to associate a Contact to one or more Accounts, Competitor Installed Base Systems, or Siemens Installed Base Systems. [Step 1] FR Contacts002-002: The system shall allow a user to establish and maintain a relationship between a Contact and one or more other Contacts, Accounts, Competitor Installed Base Systems, Siemens Installed Base Systems, or Opportunities. [Step 3] FR Contacts002-003: The system shall allow a user to create one or more Opportunities, Tasks, Appointments, or Leads from a Contact. [Step 3] FR Contacts002-004: The system shall automatically associate a Contact to any record that is created from it. [Step 3] FR Contacts002-005: The system shall allow a user to deactivate a Contact. [Step 3] FR Contacts002-006: The system shall allow an authorized user to reactivate a deactivated Contact. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Contacts001-002: The system shall require a Contact to always be associated to at least one Account. [Step 3]
Notes and Issues	N/A

4.4. Installed Base

The Installed Base is an overview of all systems (from Siemens and Competition) installed at an Account or across Accounts.

The Installed Base is very important to Sales in order to understand the customer and to identify future sales potential (e.g. for equipment replacement, options and upgrades as well as service offerings).

Use Case ID	Installed Base 001
Use Case Name	Manually create a Competitor Installed Base System
Use Case Description	Manually create a new Competitor Installed Base System in the CRM system
Actor(s)	DX Account Executive, IM/CP Account Executive, Service Sales Executive, DX Product Specialist, IM/CP Product Specialist, Remote Sales Support, SHARE Country Administrator
Business Partner	Yes
Trigger(s)	User determines that a new Competitor Installed Base System should be created in the CRM system.
Pre-Conditions	1. User has access to Competitor Installed Base in the CRM system. 2. User is authorized to create new Competitor Installed Base Systems. 3. The user is in a location that allows the creation of a new Competitor Installed Base system in the CRM system.
Post-Conditions	1. A new Competitor Installed Base system has been created in the CRM system.
Assumptions	1. User can navigate to list of Competitor Installed Base systems directly (across all Accounts) or via an associated record. 2. A Competitor Installed Base record is created by choosing a combination of a Competitor and Competitor Product. Competitor / Competitor Product combinations are maintained separately in the CRM system.
Normal Flow	1. User initiates creation of new Competitor Installed Base system. 2. System displays relevant fields. 3. User values relevant fields. 4. System accepts input and saves new Competitor Installed Base record.
Notes and Issues	There might be a challenge in the visibility of the Installed Base for external business partners. We have business partners that don't sell the entire product portfolio of a modality, but only certain products. How can we manage the visibility in such a case?
Requirements	Installed_Base001-001: The system shall allow a user to create Com-

	petitor Install Base records. [Step 1] Installed_Base001-002: The system shall allow Business Partners to review Installed Base systems only for the modalities they own under the Accounts they own. [Step 1] Installed_Base001-003: The system shall allow Business Partners to create Installed Base systems only for the modalities they own under the Accounts they own. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Installed Base 002
Use Case Name	Automatically create a Competitor Installed Base System
Use Case Description	Automatically create a new Competitor Installed Base System in the CRM system
Actor(s)	CRM system (internal process)
Business Partner	No
Trigger(s)	Internal process initiates creation of a new Competitor Installed Base System in the CRM system when an Opportunity is Lost.
Pre-Conditions	1. UC Win-Loss Logic 002 (Lose an Opportunity) has called this UC
Post-Conditions	1. A new Competitor Installed Base system has been created in the CRM system and is associated to an Opportunity and both the Sold-To and the End-User Account.
Assumptions	1. Internal process to create a new Competitor Installed Base System is triggered when a user marks an Opportunity as Lost.
Normal Flow	1. Internal process initiates creation of new Competitor Installed Base System(s) and provides relevant information. 2. System accepts input and creates new Competitor Installed Base System(s) linked to the Opportunity that was Lost and the corresponding Sold-To and End-User Account.
Notes and Issues	N/A
Requirements	Installed_Base002-001: The system shall allow an internal process that creates Competitor Installed Base systems to be initiated automatically. [Step 1] Installed_Base002-002: The system shall link automatically-created Competitor Installed Base systems to the Opportunity that was Lost and the corresponding Sold-To and End-User Account. [Step 2]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Installed Base 003
Use Case Name	Review Siemens/Competitor Installed Base
Use Case Description	Filter and review Siemens and Competitor Installed Base Systems in the CRM system
Actor(s)	DX Account Executive, IM/CP Account Executive, Service Sales Executive, DX Product Specialist, IM/CP Product Specialist, Remote Sales Support, DX Sales Manager, IM/CP Sales Manager, Key Account Manager, DX Business Manager, IM/CP Business Manager, Service Sales and Business Manager, Back Office Specialist, C-Level
Business Partner	Yes
Trigger(s)	1. User has determined that a review of the Installed Base is necessary to: a. Prepare for a customer visit b. Identify data quality issues c. Identify business potential
Pre-Conditions	1. User has access to Installed Base Systems in the CRM tool.
Post-Conditions	1. One of the following Use Cases has optionally been initiated: a. UC Installed Base 001 (Manually Create Competitor IB System) b. UC Installed Base 004 (Manually Update Competitor IB System) c. UC Leads 002 (Create a Lead manually) d. UC Opportunity 001 (Create a new Opportunity and Opportunity-Product) e. UC Installed Base 006 (Notify IB manager) f. UC Installed Base
Assumptions	1. User can navigate to list of Installed Base systems directly (across all Accounts) or via an Account. 2. Installed Base Systems include: a. Siemens Installed Base Systems b. Competitor Installed Base Systems
Normal Flow	1. User navigates to Installed Base Systems. 2. System displays Installed Base Systems. 3. User filters Installed Base Systems by relevant information. 4. System displays filtered Installed Base Systems. 5. User optionally: a. Bookmarks Installed Base Systems for follow-up. b. Executes one of the following Use Cases: i. UC Installed Base 001 (Manually Create Comp Installed Base System) ii. UC Installed Base 004 (Manually Update Installed Base System) iii. UC Leads 002 (Create a Lead manually) iv. UC Opportunity 001 (Create a new Opportunity and Opportunity-Product) v. UC Installed Base 006 (Notify IB manager)

	vi. UC Installed Base 007 (Generate Opportunity from Competitor Installed Base System) vii. UC Installed Base 008 (Generate Opportunity from Siemens Installed Base System) viii. UC Installed Base 009 (Generate Lead(s) from Competitor Installed Base System(s)) ix. UC Installed Base 010 (Generate Lead(s) from Siemens Installed Base System(s))
Notes and Issues	There might be a challenge in the visibility of the Installed Base for external business partners. We have business partners that don't sell the entire product portfolio of a modality, but only certain products. How can we manage the visibility in such a case?
Requirements	Installed_Base003-001: The system shall allow a user to bookmark Installed Base Systems for follow-up. [Step 5]
Requirements from other Use Cases that apply to this Use Case	Installed_Base001-002: The system shall allow Business Partners to review Installed Base systems only for the modalities they own under the Accounts they own. [Step 1] Installed_Base004-005: The system shall allow a user to create one or more Opportunities, Leads, Contacts, or Tasks from a Competitor Installed Base System. [Step 3] Installed_Base004-006: The system shall allow a user to create one or more Opportunities, Leads, Contacts, or Tasks from a Siemens Installed Base System. [Step 3]

Use Case ID	Installed Base 004
Use Case Name	Manually update Installed Base System
Use Case Description	Manually update Installed Base System in the CRM system
Actor(s)	DX Account Executive, IM/CP Account Executive, Service Sales Executive, DX Product Specialist, IM/CP Product Specialist, Remote Sales Support, SHARE Country Administrator
Business Partner	Yes
Trigger(s)	User determines that an update to an Installed Base System is necessary.
Pre-Conditions	1. User has access to Installed Base in the CRM system. 2. User is authorized to update Installed Base Systems. 3. UC Installed Base 003 (Review Siemens/Competitor Installed Base) has called this UC
Post-Conditions	1. An existing Installed Base System has been updated.
Assumptions	1. User can navigate to list of Installed Base systems directly (across all Accounts) or via an Account. 2. The user is in a location that allows the manual update of an existing Installed Base system in the CRM system. 3. A relationship or association is established appropriately between the Installed Base System and any records that are created from it during this Use Case. 4. Other than the Competitor Installed Base, the Siemens Installed Base is maintained by Customer Services in the local ERP systems and "linked/interfaced" to the CRM system (potentially via the Global SAP Business Warehouse). Only a limited number of fields for Siemens Installed Base Systems can be exclusively maintained in the CRM system.
Normal Flow	1. User selects an existing Installed Base System and initiates update. 2. System displays relevant fields, including information about the Installed Base System's existing relationships. 3. User maintains relevant fields appropriately, and optionally: a. *[Competitor Installed Base Systems only]* Associates or dissociates the Competitor Installed Base System to a single Sold-To Account and a single End-User Account. b. Establishes and/or maintains a relationship between the Installed Base System and one or more Contacts. c. Creates one or more of the following types of records from the Installed Base System: i. Opportunity ii. Lead iii. Contact iv. Task 4. System accepts user's updates and displays updated Installed Base System information.

Notes and Issues	There might be a challenge in the visibility of the Installed Base for external business partners. We have business partners that don't sell the entire product portfolio of a modality, but only certain products. How can we manage the visibility in such a case?
Requirements	Installed_Base004-001: The system shall allow Business Partners to update Installed Base systems only for the modalities they own under the Accounts they own. [Step 1] Installed_Base004-002: The system shall allow a user to associate a Competitor Installed Base System to a single Sold-To Account and a single End-User Account. [Step 3] Installed_Base004-003: The system shall allow a user to establish and maintain a relationship between a Competitor Installed Base System and one or more Contacts. [Step 3] Installed_Base004-004: The system shall allow a user to establish and maintain a relationship between a Siemens Installed Base System and one or more Contacts. [Step 3] Installed_Base004-005: The system shall allow a user to create one or more Opportunities, Leads, Contacts, or Tasks from a Competitor Installed Base System. [Step 3] Installed_Base004-006: The system shall allow a user to create one or more Opportunities, Leads, Contacts, or Tasks from a Siemens Installed Base System. [Step 3] Installed_Base004-007: The system shall allow Business Partners to update Installed Base systems only for the modalities they own under the Accounts they own. [Step 1]
Requirements from other Use Cases that apply to this Use Case	Installed_Base001-002: The system shall allow Business Partners to review Install Base systems only for the modalities they own under the Accounts they own. [Step 1]

Use Case ID	Installed Base 005
Use Case Name	Automatically update Competitor Installed Base
Use Case Description	Automatically update Competitor Installed Base System in the CRM system. This use case covers two business scenarios: 1. The deactivation/activation of an existing Competitor Installed Base record when its associated Opportunity is marked as Lost or Signed, or is reverted to Active from Lost or Signed. 2. The deletion of an automatically created Competitor Installed Base record when the Opportunity that it was created from is reverted to Active from Lost.
Actor(s)	CRM system (internal process)
Business Partner	No
Trigger(s)	Internal process initiates automatic update of Competitor Installed Base System(s) in the CRM system when an Opportunity is Signed or Lost, or is marked as no longer Signed or Lost.
Pre-Conditions	1. One of the following Use Cases has called this Use Case: a. UC Win-Loss Logic 001 (Sign an Opportunity) b. UC Win-Loss Logic 001 Alternate Flow 1 (User changes a Signed Opportunity to Active) c. UC Win-Loss Logic 002 (Lose an Opportunity) d. UC Win-Loss Logic 002 Alternate Flow 1 (User changes a Lost Opportunity to Active)
Post-Conditions	1. Existing Competitor Installed Base System(s) have been updated.
Assumptions	1. Internal process to update Competitor Installed Base System(s) is triggered when a user marks an Opportunity as Lost or Signed, or when a user marks a previously Lost or Signed Opportunity as Active.
Normal Flow	1. Internal process initiates activation or deactivation of Competitor Installed Base System(s) and provides relevant information. 2. System accepts input and updates Competitor Installed Base System(s) appropriately.
Alternate Flow 1	**User marks a previously Lost Opportunity as Active, and Competitor Installed Base records that were automatically created are deleted.** 1a. Internal process initiates deletion of Competitor Installed Base System(s) that were created in error. 2a. System accepts input and deletes Competitor Installed Base System(s) appropriately.
Notes and Issues	N/A
Requirements	Installed_Base005-001: The system shall allow an internal process that updates, deletes, activates, or deactivates Competitor Installed Base records to be initiated automatically. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Installed Base 006
Use Case Name	Notify Installed Base Manager when Siemens Installed Base requires updates
Use Case Description	Notify Installed Base Manager when Siemens Installed Base system requires update in external Siemens Installed Base system.
Actor(s)	DX Account Executive, IM/CP Account Executive, Service Sales Executive, DX Product Specialist, IM/CP Product Specialist, Remote Sales Support
Business Partner	Yes
Trigger(s)	User determines that Siemens Installed Base system requires an update in the external Siemens Installed Base system.
Pre-Conditions	1. UC Installed Base 003 (Review Siemens/Competitor Install Base) has called this Use Case. 2. User has navigated to the details view for the Siemens Installed Base System that an update request will be generated for.
Post-Conditions	1. An external update request has been sent to the Installed Base Manager responsible for the external Siemens Installed Base system.
Assumptions	1. The Siemens Installed Base is maintained by Customer Services in the local ERP systems and "linked/interfaced" to the CRM system (potentially via the Global SAP Business Warehouse). 2. The notifications triggered by this Use Case are external notifications initiated by the CRM system. The IB manager might not be a user of the CRM system.
Normal Flow	1. User selects a Siemens Installed Base System and initiates an update request to the Installed Base Manager. 2. System prompts user to enter relevant information. 3. User enters relevant information and confirms update request. 4. System generates update request from the Siemens Installed Base System and sends external update request to Siemens Installed Base manager.
Notes and Issues	Contact points (such as personal email addresses, an email mailbox, etc.) for the Installed Base Manager on a global and/or Country-by-Country basis exists in a static list that is updated on a monthly basis. This list exists in an external system and is based on geography.
Requirements	Installed_Base006-001: The system shall allow a user to initiate an external update request to the Siemens Installed Base Manager from the details view for a Siemens Installed Base System. [Step 1] Installed_Base006-002: The system shall require a user to enter relevant information on an update request to the Siemens Installed Base Manager. [Step 2] Installed_Base006-003: The system shall send an external notification to the appropriate Siemens Installed Base Manager. [Step 4]

Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Installed Base 007
Use Case Name	Generate Opportunity from Competitor Installed Base System
Use Case Description	To generate a new Opportunity from a Competitor Installed Base System in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	1. User has determined that a new Opportunity should be created from a Competitor Installed Base System.
Pre-Conditions	1. User has access to Competitor Installed Base Systems in the CRM system. 2. User has access to the Competitor Installed Base System that an Opportunity will be generated from. 3. User is authorized to generate Opportunities from Competitor Installed Base Systems. 4. User has navigated to the details view for the Competitor Installed Base System that an Opportunity will be generated from in the CRM system.
Post-Conditions	1. A new Opportunity has been generated from a Competitor Installed Base System in the CRM system. 2. An association has been established between the Competitor Installed Base System and the Opportunity that was generated from it.
Assumptions	1. User can navigate to a list of Competitor Installed Base systems directly (across all Accounts) or via an Account. 2. User can only generate a new Opportunity for a Competitor Installed Base System from its details view in the CRM system.
Normal Flow	1. User initiates the generation of an Opportunity from the Competitor Installed Base System. 2. System prompts the user for relevant information. 3. User provides relevant information. 4. System accepts the user's input and: a. Generates a new Opportunity from the Competitor Installed Base System. b. Establishes an association between the Competitor Installed Base System and the newly-generated Opportunity. c. Displays the Edit Opportunity screen for the newly-generated Opportunity.
Notes and Issues	Document field defaults for this UC's Opportunity generation process as part of business/field logic.
Requirements	Installed_Base007-001: The system shall allow a user to generate a new Opportunity for a Competitor Installed Base System from its details view. [Step 1]

	Installed_Base007-002: The system shall automatically establish an association between the newly-generated Opportunity and the Competitor Installed Base System from which it was generated. [Step 4] Installed_Base007-003: The system shall automatically navigate the user to the Edit Opportunity screen for the newly-generated Opportunity when an Opportunity is generated from a Competitor Installed Base System. [Step 4]
Requirements from other Use Cases that apply to this Use Case	Installed_Base001-002: The system shall allow Business Partners to review Install Base systems only for the modalities they own under the Accounts they own. [Step 1]

Use Case ID	Installed Base 008
Use Case Name	Generate Opportunity from Siemens Installed Base System
Use Case Description	To generate a new Opportunity from a Siemens Installed Base System in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	1. User has determined that a new Opportunity should be created from a Siemens Installed Base System.
Pre-Conditions	1. User has access to Siemens Installed Base Systems in the CRM system. 2. User has access to the Siemens Installed Base System that an Opportunity will be generated from. 3. User is authorized to generate Opportunities from Siemens Installed Base Systems. 4. User has navigated to the details view for the Siemens Installed Base System that an Opportunity will be generated from in the CRM system.
Post-Conditions	1. A new Opportunity has been generated from a Siemens Installed Base System in the CRM system. 2. An association has been established between the Siemens Installed Base System and the Opportunity that was generated from it.
Assumptions	1. User can navigate to a list of Siemens Installed Base systems directly (across all Accounts) or via an Account. 2. User can only generate a new Opportunity for a Siemens Installed Base System from its details view in the CRM system.
Normal Flow	1. User initiates the generation of an Opportunity from the Siemens Installed Base System. 2. System prompts the user for relevant information. 3. User provides relevant information. 4. System accepts the user's input and: a. Generates a new Opportunity from the Siemens Installed Base System. b. Establishes an association between the Siemens Installed Base System and the newly-generated Opportunity. c. Displays the Edit Opportunity screen for the newly-generated Opportunity.
Notes and Issues	Document field defaults for this UC's Opportunity generation process as part of business/field logic.
Requirements	Installed_Base008-001: The system shall allow a user to generate a new Opportunity from a Siemens Installed Base System. [Step 1] Installed_Base008-002: The system shall automatically establish an

	association between the newly-generated Opportunity and the Siemens Installed Base System from which it was generated. [Step 4] Installed_Base008-003: The system shall automatically navigate the user to the Edit Opportunity screen for the newly-generated Opportunity when an Opportunity is generated from a Siemens Installed Base System. [Step 4]
Requirements from other Use Cases that apply to this Use Case	Installed_Base001-002: The system shall allow Business Partners to review Installed Base systems only for the modalities they own under the Accounts they own. [Step 1]

Use Case ID	Installed Base 009
Use Case Name	Generate Lead(s) from Competitor Installed Base System(s)
Use Case Description	To generate a single new Lead from each Competitor Installed Base System that a user has selected in the CRM system.
Actor(s)	DX Account Executive, IM/CP Account Executive, Service Sales Executive, DX Product Specialist, IM/CP Product Specialist, Remote Sales Support, DX Sales Manager, IM/CP Sales Manager, Key Account Manager, DX Business Manager, IM/CP Business Manager, Service Sales and Business Manager, Back Office Specialist
Business Partner	Yes
Trigger(s)	1. User has determined that new Lead(s) should be created for one or multiple selected Competitor Installed Base System(s).
Pre-Conditions	1. User has access to Competitor Installed Base Systems in the CRM system. 2. User has access to the Competitor Installed Base System(s) that Lead(s) will be generated for. 3. User is authorized to generate Leads for Competitor Installed Base Systems. 4. User has navigated to the list or detail view for Competitor Installed Base Systems.
Post-Conditions	1. A single new Lead has been generated for each Competitor Installed Base System that the user has selected in the CRM system. 2. An association has been established between each Competitor Installed Base System and the Lead that was generated from it.
Assumptions	1. User can navigate to a list of Competitor Installed Base Systems directly (across all Accounts) or via an Account. 2. User can only generate a new Lead for a Competitor Installed Base System from a list of Competitor Installed Base Systems in the CRM system.
Normal Flow	1. User selects one or more Competitor Installed Base Systems and initiates the generation of a single Lead for each selected system. 2. System prompts the user for relevant information. 3. User provides relevant information. 4. System accepts the user’s input and: a. Generates a new Lead for each selected Competitor Installed Base System. b. Establishes an association between each selected Competitor Installed Base System and its newly-generated Lead. c. Initiates UC Leads004 (Automatically Assign a Lead)
Notes and Issues	Document field defaults for this UC’s Lead generation process as part of business/field logic.

	It is possible for a user to select and generate Leads for both Competitor IB systems and Siemens IB systems at the same time. In this scenario, the user selects both types of systems and then executes UC Installed Base 009 and UC Installed Base 010 simultaneously.
Requirements	Installed_Base009-001: The system shall allow a user to generate a single new Lead for each selected Competitor Installed Base System from a list of Competitor Installed Base Systems. [Step 1] Installed_Base009-002: The system shall automatically establish an association between each selected Competitor Installed Base System and its newly-generated Lead. [Step 4]
Requirements from other Use Cases that apply to this Use Case	Installed_Base001-002: The system shall allow Business Partners to review Install Base systems only for the modalities they own under the Accounts they own. [Step 1]

Use Case ID	Installed Base 010
Use Case Name	Generate Lead(s) from Siemens Installed Base System(s)
Use Case Description	To generate a single new Lead from each Siemens Installed Base System that a user has selected in the CRM system.
Actor(s)	DX Account Executive, IM/CP Account Executive, Service Sales Executive, DX Product Specialist, IM/CP Product Specialist, Remote Sales Support, DX Sales Manager, IM/CP Sales Manager, Key Account Manager, DX Business Manager, IM/CP Business Manager, Service Sales and Business Manager, Back Office Specialist
Business Partner	Yes
Trigger(s)	1. User has determined that new Lead(s) should be created for one or multiple selected Siemens Installed Base System(s).
Pre-Conditions	1. User has access to Siemens Installed Base Systems in the CRM system. 2. User has access to the Siemens Installed Base System(s) that Lead(s) will be generated for. 3. User is authorized to generate Leads for Siemens Installed Base Systems. 4. User has navigated to the list view for Siemens Installed Base Systems.
Post-Conditions	1. A single new Lead has been generated for each Siemens Installed Base System that the user has selected in the CRM system. 2. An association has been established between each Siemens Installed Base System and the Lead that was generated from it.
Assumptions	1. User can navigate to a list of Siemens Installed Base Systems directly (across all Accounts) or via an Account. 2. User can only generate a new Lead for a Siemens Installed Base System from a list of Siemens Installed Base Systems in the CRM system.
Normal Flow	1. User selects one or more Siemens Installed Base Systems and initiates the generation of a single Lead for each selected system. 2. System prompts the user for relevant information. 3. User provides relevant information. 4. System accepts the user's input and: a. Generates a new Lead for each selected Siemens Installed Base System. b. Establishes an association between each selected Siemens Installed Base System and its newly-generated Lead. c. Initiates UC Leads004 (Automatically Assign a Lead)
Notes and Issues	Document field defaults for this UC's Lead generation process as part of business/field logic.

	It is possible for a user to select and generate Leads for both Competitor IB systems and Siemens IB systems at the same time. In this scenario, the user selects both types of systems and then executes UC Installed Base 009 and UC Installed Base 010 simultaneously.
Requirements	Installed_Base010-001: The system shall allow a user to generate a single new Lead for each selected Siemens Installed Base System from a list of Siemens Installed Base Systems. [Step 1] Installed_Base010-002: The system shall automatically establish an association between each selected Siemens Installed Base System and its newly-generated Lead. [Step 4]
Requirements from other Use Cases that apply to this Use Case	Installed_Base001-002: The system shall allow Business Partners to review Installed Base systems only for the modalities they own under the Accounts they own. [Step 1]

4.5. Leads

A Lead is a non-binding information or suggestion that there could be a potential for business with a specific Account and/or Contact. Lead details contain a combination of the following information: customer (Account), person (Contact), and business Opportunity (potential).

Collecting leads and managing them are the initial stages in the sales process. Leads can be obtained through internal data mining (e.g. analysis of the Installed Base data), trade shows, marketing campaigns etc. Once the leads are collected, it is essential to manage them, follow them up and to document the result of the Lead qualification in the CRM system. If real business potential has been identified during Lead qualification, the Lead gets promoted to an Opportunity.

Use Case ID	Leads001
Use Case Name	Import a group of Leads from an external source
Use Case Description	To import a new group of Leads from an external source in the CRM system.
Actor(s)	SHARE Country Administrator
Business Partner	No
Trigger(s)	1. Admin determines that a new group of Leads should be imported into the CRM system.
Assumptions	N/A
Pre-Conditions	1. Admin is authorized to import Leads from an external source. 2. An external data source for the Leads that will be created in the CRM system exists. 3. Admin has navigated to a location in the CRM system that allows the importing of Leads.
Post-Conditions	1. A new group of Leads exists in the CRM system.
Normal Flow	1. Admin initiates the import of a new group of Leads. 2. System displays relevant fields and prompts user for upload file and template. 3. Admin values relevant fields and provides upload file and template. 4. System processes upload file, creates leads, saves them, and notifies admin that import was successful. 5. Admin optionally executes UC Leads 005 (Manually assign a Lead).
Alternative Flow 1	**Import does not complete successfully** 4a. System processes upload file, creates leads, saves them, and provides admin with detailed information about any errors that occurred. 5a. Admin reviews results of Lead import and optionally: a. Executes UC 006 (Review a Lead) b. Executes UC 011 (Purge a group of imported Leads)
Notes and Issues	N/A

Requirements	FR Leads001-001: The system shall allow an administrator to initiate a Leads import from an external source. [Step 1] FR Leads001-002: The system shall allow an administrator to define the Lead import mapping template(s) that are available to authorized users. [Step 2] FR Leads001-003: The system shall allow an administrator to choose the Lead import mapping template to use when s/he imports a group of Leads. [Step 3] FR Leads001-004: The system shall allow an administrator to choose the external import file that s/he will use for a Leads import. [Step 3] FR Leads001-005: The system shall allow an administrator to download blank copies of the available Lead import mapping template(s). [Step 3] FR Leads001-006: The system shall notify an administrator appropriately when a Leads import completes successfully. [Step 4] FR Leads001-007: The system shall notify an administrator appropriately when a Leads import experiences error(s). [Step 4a] FR Leads001-008: The system shall provide detailed information about any errors that occur in a Leads import. [Step 4a] FR Leads001-009: The system shall allow a user to identify a group of leads that were imported together in a single import job. [Step 4] FR Leads001-010: The system shall allow an administrator to specify group(s) of Leads within an import. [Step 3] FR Leads001-011: The system shall allow a user to identify Leads that are created by an import job. [Step 4]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads002
Use Case Name	Create a Lead Manually
Use Case Description	To manually create a new Lead in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Product Specialist, DX Product Specialist, IM/CP Sales Manager, DX Sales Manager, Key Account Manager, IM/CP Business Manager, DX Business Manager, Service Sales and Business Manager, Remote Sales Support, Back Office Specialist
Business Partner	Yes
Trigger(s)	1. User determines that a new Lead should be created in the CRM system.
Assumptions	N/A
Pre-Conditions	1. User has access to a list of Leads. 2. User is authorized to create Leads. 3. User has navigated to a location in the CRM system that allows the manual creation of Leads.
Post-Conditions	1. A new Lead exists in the CRM system.
Normal Flow	1. User initiates manual Lead creation. 2. System displays relevant fields. 3. User values relevant fields. 4. System stores Lead. 5. User optionally executes UC Leads 005 (Manually assign a Lead).
Notes and Issues	N/A
Requirements	FR Leads002-001: The system shall allow a user to manually create a Lead. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads003
Use Case Name	Create Lead(s) via an interface
Use Case Description	To create new Lead(s) via an interface in the CRM system.
Actor(s)	CRM System (interface), External System (interface)
Business Partner	No
Trigger(s)	1. External or internal interface initiates creation of Lead(s) in the CRM system.
Assumptions	1. The external or internal interface that will create Lead(s) exists.
Pre-Conditions	1. The external or internal interface that will create Lead(s) has been initiated.
Post-Conditions	1. New Lead(s) exist in the CRM system.
Normal Flow	1. Automatic interface submits Lead information. 2. System accepts Lead(s) information, creates Lead(s), saves them, notifies the submitting source that lead creation was successful and calls UC Leads 004 (Automatically Assign a Lead).
Alternative Flow 1	**Lead creation does not complete successfully** 2a. System accepts Lead(s) information, creates Lead(s), saves them, notifies submitting system with detailed information about any errors that occurred, and calls UC Leads 004 (Automatically Assign a Lead).
Notes and Issues	N/A
Requirements	FR Leads003-001: The system shall provide an automatic interface that creates new Leads based on input from external and internal processes. [Step 1] FR Leads003-002: The system shall allow a user to identify Leads that are created by an automatic interface. [Step 2] FR Leads003-003: The system shall allow a user to identify a group of Leads that were created together via an automatic interface. [Step 2]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads004
Use Case Name	Automatically assign a Lead
Use Case Description	To automatically assign a Lead to a user in the CRM system.
Actor(s)	CRM System (internal process)
Business Partner	No
Trigger(s)	1. The automatic process that assigns Leads to users in the CRM system has been initiated by: a. An on-demand interface b. A timed automatic interface
Assumptions	1. An automatic process exists that determines how Leads should be assigned to users in the CRM system. 2. The process to automatically assign a Lead can be initiated for a group of Leads but is executed for one Lead at a time.
Pre-Conditions	1. Lead(s) that will be automatically assigned to users exist.
Post-Conditions	1. A Lead has been assigned to user(s) in the CRM system. 2. Notification(s) have been sent to user(s) newly-assigned to Leads in the CRM system.
Normal Flow	1. Automatic Lead assignment is initiated. 2. System evaluates a Lead, compares Lead data to assignment criteria, assigns Lead, and notifies user(s) about newly assigned Lead(s) appropriately.
Notes and Issues	N/A
Requirements	FR Leads004-001: The system shall provide an automatic process that assigns Leads. [Step 1] FR Leads004-002: The system shall automatically push a single notification to each user who has been automatically assigned to one or more Leads by the automatic Lead assignment process. [Step 2]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads005
Use Case Name	Manually assign a Lead
Use Case Description	To manually assign a Lead to a user in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Product Specialist, DX Product Specialist, IM/CP Sales Manager, DX Sales Manager, Key Account Manager, IM/CP Business Manager, DX Business Manager, Service Sales and Business Manager, Remote Sales Support, Back Office Specialist
Business Partner	Yes
Trigger(s)	1. User has determined that a Lead's assignment should be manually changed.
Assumptions	N/A
Pre-Conditions	1. Lead that will be manually assigned to user(s) exists. 2. User has access to Lead that will be manually assigned. 3. User is authorized to manually assign Lead that will be manually assigned. 4. User has navigated to a location in the CRM system that allows manual Lead assignment.
Post-Conditions	1. A Lead has been assigned to user(s) in the CRM system.
Normal Flow	1. User selects Lead to assign. 2. System displays detailed information about Lead. 3. User changes Lead assignment. 4. System stores updates and notifies user(s) about newly assigned Lead(s) appropriately.
Notes and Issues	
Requirements	FR Leads005-001: The system shall allow a user to manually change a Lead's assignment. [Step 3] FR Leads005-002: The system shall automatically push a single notification to each user who has been manually assigned to one or more Leads. [Step 4] FR Leads005-003: The system shall allow Leads to be assigned to a queue. [Step 3] FR Leads005-004: The system shall allow authorized users to take ownership of Leads from a queue. [Step 3]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads006
Use Case Name	Review a Lead
Use Case Description	To review and optionally update Lead in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Product Specialist, DX Product Specialist, IM/CP Sales Manager, DX Sales Manager, Key Account Manager, IM/CP Business Manager, DX Business Manager, Service Sales and Business Manager, Remote Sales Support, Back Office Specialist
Business Partner	Yes
Trigger(s)	1. User has determined that a Lead should be reviewed in the CRM system.
Assumptions	1. An external process for qualifying Leads exists, and includes: a. Verifying that the customer exists b. Verifying that the customer is interested in doing business with Siemens c. Verifying that the customer has a need, a defined timeline, and an approved budget for the business potential that the Lead represents 2. An association is established appropriately between the Lead and any records that are created from it during this Use Case.
Pre-Conditions	1. Lead that will be reviewed exists. 2. User has access to Lead that will be reviewed. 3. User is authorized to review and update Leads. 4. User has navigated to a location in the CRM system that allows Leads to be reviewed and updated.
Post-Conditions	1. A Lead has been reviewed and optionally updated in the CRM system.
Normal Flow	1. User chooses Lead to review. 2. System displays detailed information about Lead and allows the user to review the Lead's Account and that Account's associated records, (Appointments, Tasks, Contacts, Opportunities, Projects, Siemens Installed Base, Competitor Installed Base, Leads, etc.). 3. User optionally: a. Updates Lead Information b. Associates or dissociates the Lead to a single: i. Account ii. Competitor Installed Base System iii. Siemens Installed Base System c. Associates or dissociates the Lead to one or more Contacts. d. Creates a single Competitor Installed Base System. e. Creates one or more of the following types of records from the Lead: i. Appointment ii. Task iii. Contact 4. System stores update. 5. User optionally executes:

	a. UC Leads 004 (Automatically assign a Lead) b. UC Leads 005 (Manually assign a Lead) c. UC Leads 007 (Closing a Lead) d. UC Installed Base 006 (Notify IB manager)
Notes and Issues	N/A
Requirements	FR Leads006-001: The system shall allow a user to optionally display information about a Lead's Account from the Lead. [Step 2] FR Leads006-002: The system shall allow a user to optionally display information about the records associated to a Lead's Account from the Lead (i.e. Appointments, Tasks, Contacts, Opportunities, Projects, Siemens Installed Base Records, Competitor Installed Base Records, Leads, etc.). [Step 2] FR Leads006-003: The system shall allow a user to associate a Lead to a single Account, Siemens Installed Base Record, or Competitor Installed Base Record. [Step 3] FR Leads006-004: The system shall allow a user to associate a Lead to one or more Contacts. [Step 3] FR Leads006-005: The system shall allow a user to create one or more Appointments, Tasks, or Contacts from a Lead. [Step 3] FR Leads006-006: The system shall allow a user to create a single Competitor Installed Base System from a Lead. [Step 3] FR Leads006-007: The system shall automatically associate a Lead to any record that is created from it. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Leads001-009: The system shall allow a user to identify a group of leads that were imported together in a single import job. [Step 1] FR Leads001-011: The system shall allow a user to identify Leads that are created by an import job. [Step 1] FR Leads003-002: The system shall allow a user to identify Leads that are created by an automatic interface. [Step 1] FR Leads003-003: The system shall allow a user to identify a group of Leads that were created together via an automatic interface. [Step 1]

Use Case ID	Leads007
Use Case Name	Promote a Lead
Use Case Description	To Promote a Lead to an Opportunity in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Product Specialist, DX Product Specialist, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	1. User has determined that a Lead should be promoted to an Opportunity in the CRM system.
Assumptions	1. An external process for qualifying Leads exists, and includes: a. Verifying that the customer exists b. Verifying that the customer is interested in doing business with Siemens c. Verifying that the customer has a need, a defined timeline, and an approved budget for the business potential that the Lead represents
Pre-Conditions	1. The Lead that will be promoted exists. 2. User has access to the Lead that will be promoted. 3. User is authorized to promote the Lead that will be promoted. 4. User has navigated to a location in the CRM system that allows the promotion of Leads.
Post-Conditions	1. A Lead has been promoted in the CRM system. 2. An Opportunity has been created in the CRM system.
Normal Flow	1. User selects a Lead to promote. 2. System displays detailed information about Lead and allows the user to review the Lead's Account and that Account's associated records. 3. User initiates Lead Promotion. 4. System displays relevant fields. 5. User values relevant fields. 6. System accepts Lead status change and: a. Creates an Opportunity from the Lead. b. Updates the Lead with information from the Opportunity appropriately. c. Updates the Opportunity with information from the Lead appropriately. d. Marks the Lead as Promoted.
Notes and Issues	Can the CRM system *painlessly* automate the creation of a contact when a Lead is promoted? Consider the following points together with the implementation partner: 1. If a Lead is imported with contact data, and the system cannot match that contact data to an existing contact, what does it put on the lead? Free-text contact information? 2. If a Lead, at the time of promotion, has contact information entered into it that does not map to an existing contact (could this happen through a leads import, as in item #1 above?), should the system automatically create a new contact without asking the user?

	a. Should the system ask the user whether a new contact should be created? b. Can we do this without using a pop-up message? Pop-up messages are painful. 3. We allow the user to create one or more Contact(s) from a Lead at any time prior to promoting / abandoning a Lead. Is this enough? Do we really need to build some sort of automatic Contact creation during Lead promotion / abandonment as well? Internal note: We will have four Lead statuses in the future: Active, Promoted, Abandoned, and Postponed. "Abandoned" and "Rejected" have been merged into "Abandoned."
Requirements	FR Leads007-001: The system shall allow a user to initiate Lead promotion. [Step 3] FR Leads007-002: The system shall create an Opportunity from a Lead when the Lead is promoted. [Step 6] FR Leads007-003: The system shall update a promoted Lead with information from the Opportunity that was created from it during promotion. [Step 6] FR Leads007-004: The system shall update an Opportunity that is created from a promoted Lead with information from the Lead that it is created from. [Step 6] FR leads007-005: The system shall mark a Lead as promoted once it has been promoted. [Step 6] FR leads007-006: The system shall set a Lead to read only once it has been promoted. [Step 6] FR leads007-007: The system shall prevent a user from promoting a Lead that has already been promoted. [Step 6] FR leads007-008: The system indicates mandatory fields for lead promotion. [Step 4]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads008
Use Case Name	Abandon a Lead
Use Case Description	To Abandon a Lead in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Product Specialist, DX Product Specialist, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	1. User has determined that a Lead should be abandoned in the CRM system.
Assumptions	1. An external process for qualifying Leads exists, and includes: a. Verifying that the customer exists b. Verifying that the customer is interested in doing business with Siemens c. Verifying that the customer has a need, a defined timeline, and an approved budget for the business potential that the Lead represents 2. Establishing and/or changing the association between a Lead and an Opportunity without promoting the Lead is an administrator task, and is covered in a separate use case (UC Leads010 (Admin modifies a Lead's Opportunity Association)). 3. A user abandons a Lead if it does not represent any current or future business potential.
Pre-Conditions	1. The Lead that will be abandoned exists. 2. User has access to the Lead that will be abandoned. 3. User is authorized to abandon the Lead that will be abandoned. 4. User has navigated to a location in the CRM system that allows the abandonment of Leads.
Post-Conditions	1. A Lead has been abandoned in the CRM system.
Normal Flow	1. User selects a Lead to abandon. 2. System displays detailed information about the Lead and allows the user to review the Lead's Account and that Account's associated records. 3. User initiates Lead Abandonment. 4. System displays relevant fields. 5. User values relevant fields. 6. System accepts Lead status change and marks the Lead as Abandoned.
Notes and Issues	In SHARE today, if a user indicates that a Lead has been abandoned because an Opportunity already exists, s/he is required to prove this by associating the Lead to the Opportunity. We do not see an added value here and therefore do not want to do this in the future. Instead, we want an administrator to be able to establish/change the link between a Lead and an Opportunity if it is necessary to do for compensation reasons (for example, when an Opportunity is created independently but should have been created by promoting a Lead). Internal note: We will have four Lead statuses in the future: Active, Promoted, Abandoned, and Postponed. "Abandoned" and "Rejected"

	have been merged into "Abandoned."
Requirements	FR Leads008-001: The system shall allow a user to initiate Lead abandonment. [Step 3] FR Leads008-002: The system shall mark a Lead as Abandoned once it has been abandoned. [Step 6]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads009
Use Case Name	Postpone a Lead
Use Case Description	To Postpone a Lead in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Product Specialist, DX Product Specialist, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	1. User has determined that a Lead should be postponed in the CRM system.
Assumptions	1. An external process for qualifying Leads exists, and includes: a. Verifying that the customer exists b. Verifying that the customer is interested in doing business with Siemens c. Verifying that the customer has a need, a defined timeline, and an approved budget for the business potential that the Lead represents 2. Establishing and/or changing the association between a Lead and an Opportunity without promoting the Lead is an administrator task, and is covered in a separate use case.
Pre-Conditions	1. The Lead that will be postponed exists. 2. User has access to the Lead that will be postponed. 3. User is authorized to postpone the Lead that will be postponed. 4. User has navigated to a location in the CRM system that allows the postponement of Leads.
Post-Conditions	1. A Lead has been postponed in the CRM system.
Normal Flow	1. User selects a Lead to postpone. 2. System displays detailed information about the Lead and allows the user to review the Lead's Account and that Account's associated records. 3. User initiates Lead Postponement. 4. System displays relevant fields. 5. User values relevant fields, including the date that the Lead is postponed until. 6. System accepts Lead status change and marks the Lead as Postponed.
Notes and Issues	There are many ways to handle FR Leads009-004; we need to discuss potential implementation options with our implementation partner. Internal note: We will have four Lead statuses in the future: Active, Promoted, Abandoned, and Postponed. "Abandoned" and "Rejected" have been merged into "Abandoned."
Requirements	FR Leads009-001: The system shall allow a user to initiate Lead postponement. [Step 3] FR Leads009-002: The system shall mark a Lead as Postponed once it has been postponed. [Step 6]

	FR Leads009-003: The system shall allow a user to indicate the date that a Lead is postponed until. [Step 5] FR Leads009-004: The system shall notify a user when the date that a Lead is postponed until has been reached. [Step 5]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads010
Use Case Name	Admin modifies a Lead's Opportunity Association
Use Case Description	To modify a Lead's Opportunity Association in the CRM system.
Actor(s)	SHARE Country Administrator, SHARE System Administrator
Business Partner	No
Trigger(s)	1. User has determined that a Lead's Opportunity Association should be modified in the CRM system.
Assumptions	N/A
Pre-Conditions	1. The Lead and Opportunity that will have their association modified exist. 2. Admin has access to the Lead and Opportunity that will have their association modified. 3. Admin is authorized to modify associations between Leads and Opportunities. 4. Admin has navigated to a location in the CRM system that allows associations between Leads and Opportunities to be modified.
Post-Conditions	1. The association between a Lead and an Opportunity has been modified in the CRM system.
Normal Flow	1. Admin selects a Lead to maintain an association for. 2. System displays detailed information about the Lead and its existing association. 3. Admin updates the Lead's association to an Opportunity. 4. System accepts admin's updates and displays updated Lead association details.
Notes and Issues	
Requirements	FR Leads010-001: The system shall allow an admin to maintain the association between a Lead and an Opportunity. [Step 3]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Leads011
Use Case Name	Purge a group of imported or automatically-created Leads
Use Case Description	To purge a group of imported or automatically-created Leads in the CRM system.
Actor(s)	SHARE Country Administrator, SHARE System Administrator
Business Partner	No
Trigger(s)	1. Admin has determined that a group of imported or automatically-created Leads should be purged from the CRM system.
Assumptions	1. Purging a group of imported or automatically-created Leads means deleting them from the system to "undo" an import or automatic creation process. 2. Purging will not delete Leads that have already been promoted. 3. Leads that will be purged must have been imported or automatically-created together in a single job.
Pre-Conditions	1. The Leads that will be purged exist. 2. Admin has access to the Leads that will be purged. 3. Admin is authorized to purge Leads. 4. Admin has navigated to a location in the CRM system that allows Leads to be purged.
Post-Conditions	1. A group of Leads have been purged in the CRM system.
Normal Flow	1. Admin selects a group of Leads to purge and initiates a purge. 2. System purges Leads and notifies admin that purge was successful.
Alternative Flow 1	**One or more Leads that will be purged have already been promoted** 2a. System purges Leads and provides admin with detailed information about any Leads that have already been promoted and could not be purged.
Notes and Issues	
Requirements	FR Leads011-001: The system shall allow an admin to initiate a Leads purge for a group of Leads that were imported together in a single import job. [Step 1] FR Leads011-002: The system shall notify an admin when a Leads purge completes successfully. [Step 2] FR Leads011-003: The system shall notify an admin appropriately when a Leads purge experiences error(s). [Step 2a] FR Leads011-004: The system shall provide detailed information about any errors that occur in a Leads purge. [Step 2a]
Requirements from other Use Cases that apply to this Use Case	FR Leads001-009: The system shall allow a user to identify a group of leads that were imported together in a single import job. [Step 1] FR Leads001-011: The system shall allow a user to identify Leads that

	are created by an import job. [Step 1] FR Leads003-002: The system shall allow a user to identify Leads that are created by an automatic interface. [Step 1] FR Leads003-003: The system shall allow a user to identify a group of Leads that were created together via an automatic interface. [Step 1]

4.6. Opportunities and Projects

In the CRM system, a Project is a container to be used to group opportunities together (one to many relationship). This allows a sales person to easily find and manage Opportunities that somehow belong together (e.g. Opportunities from the same tender).

An Opportunity represents a potential sale to a new or established customer (i.e. Account) that needs to be tracked through the sales process to completion. Unlike a Lead, an Opportunity is a confirmed business potential, i.e. the customer has entered into his/her buying cycle, i.e. s/he has a need, a budget and a concrete timeline for the purchase.

In the CRM system, Opportunities can be grouped together in a Project. An Opportunity can only be assigned to one Project at a time.

An Opportunity is finally closed as won, lost or abandoned.

Tracking opportunities through the sales process is very important and a prerequisite for proper sales funnel management and in order to measure, manage and improve market transparency.

Use Case ID	Opportunity001
Use Case Name	Create a new Opportunity and Opportunity-Product
Use Case Description	To create a new Opportunity and Opportunity-Product in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	User determines that a new Opportunity should be created.
Pre-Conditions	1. User has access to Opportunities. 2. User is authorized to create new Opportunities. 3. User is in a location within the CRM system that allows the creation of new Opportunities.
Post-Conditions	1. A new Opportunity exists in the CRM system. 2. At least one new Opportunity-Product exists in the CRM system. 3. The newly-created Opportunity-Product(s) are associated to the newly-created Opportunity.
Assumptions	N/A
Normal Flow	1. User initiates Opportunity creation. 2. System displays relevant fields for Opportunity and Opportunity-Product creation. 3. User values relevant fields. 4. System accepts input and creates a new Opportunity and associated Opportunity-Product(s).
Requirements	FR Opportunity001-001: The system shall allow a user to create a new Opportunity and Opportunity-Product. [Step 1] FR Opportunity001-002: The system shall require a user to create a new Opportunity-Product when the user creates a new Opportunity.

	[Step 2] FR Opportunity001-003: The system shall associate an Opportunity-Product and Opportunity with each other when they are created together. [Step 4] FR Opportunity001-004: The system shall require an Opportunity to always be associated to at least one Opportunity-Product. [Step 4] FR Opportunity001-005: The system shall prevent the creation of duplicate Opportunities. [Step 4] FR Opportunity001-006: The system shall require an Opportunity to be associated to a verified Account that the user has visibility to. [Step 4]
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	1. Can Territory Management assign some users to an item with read-only access and assign other users to the same object with read-write access? 2. It may be necessary to support Opportunities with multiple revenue line items (Opportunity-Products); pending decision after workshop with our service colleagues. 3. A business need exists to track alternate configurations at the funnel management level. We expect that this will take the form of Alternate Opportunities or Opportunity Products; further discussions with Oracle are required to better understand the best way to do this.

Use Case ID	Opportunity002
Use Case Name	Create a Service Point of Sale Opportunity from an Equipment Opportunity
Use Case Description	To generate a Service Point of Sale Opportunity from an Equipment Opportunity in the CRM system.
Actor(s)	Service Sales Executive, IM/CP Account Executive, DX Account Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	User determines that a Service Point of Sale Opportunity should be created from an Equipment Opportunity in the CRM system.
Pre-Conditions	1. User has access to Opportunities. 2. User has access to existing Equipment Opportunity for which a Service Point of Sale Opportunity will be created. 3. User is authorized to generate Service Point of Sale Opportunities from Equipment Opportunities. 4. User is in a location within the CRM system that allows the generation of Service Point of Sale Opportunities from Equipment Opportunities.
Post-Conditions	1. A Service Point of Sale Opportunity has been generated from an Equipment Opportunity in the CRM system. 2. An association has been established between the newly-created Service Point of Sale Opportunity and the Equipment Opportunity that it was generated from.
Assumptions	1. The term “Equipment” refers to both IM/CP Equipment and DX Instruments.
Normal Flow	1. User selects an Equipment Opportunity from which to generate a Service Point of Sale Opportunity. 2. System displays Equipment Opportunity details. 3. User initiates generation of a new Service Point of Sale Opportunity. 4. System prompts user to value relevant fields. 5. User values relevant fields. 6. System accepts user’s input, displays the results of the Service Point of Sale Opportunity generation, and links the newly-generated Service Point of Sale Opportunity to the Equipment Opportunity.
Requirements	FR Opportunity 002-001: The system shall allow an authorized user to generate a Service Opportunity and Opportunity-Product from an Equipment Opportunity. [Step 3] FR Opportunity 002-002: The system shall determine which fields to copy, default, or prompt the user to value when a Service Opportunity or Opportunity-Product is generated from an Equipment Opportunity. [Step 4] FR Opportunity 002-003: The system shall determine which related objects to copy, default, or prompt the user to value when a Service

	Opportunity or Opportunity-Product is generated from an Equipment Opportunity. [Step 4] FR Opportunity 002-004: The system shall associate a Service Opportunity and the Equipment Opportunity it is generated from to each other. [Step 6] FR Opportunity 002-005: The system shall generate an appropriate notification when an Equipment Opportunity which is linked to a Service Opportunity is updated. [Step 6]
Requirements from other Use Cases that apply to this Use Case	FR Opportunity001-002: The system shall require a user to create a new Opportunity-Product when the user creates a new Opportunity. [Step 5] FR Opportunity001-003: The system shall associate an Opportunity-Product and Opportunity with each other when they are created together. [Step 5] FR Opportunity001-004: The system shall require an Opportunity to always be associated to at least one Opportunity-Product. [Step 5] FR Opportunity001-005: The system shall prevent the creation of duplicate Opportunities. [Step 5] FR Opportunity001-006: The system shall require an Opportunity to be associated to a verified Account that the user has visibility to. [Step 5]
Notes and Issues	1. It may be necessary to support Opportunities with multiple revenue line items (Opportunity-Products); pending decision after workshop with our service colleagues.

Use Case ID	Opportunity003
Use Case Name	Update an existing Opportunity
Use Case Description	To update an existing Opportunity and Opportunity-Product in the CRM system.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support, IM/CP Product Specialist, DX Product Specialist
Business Partner	Yes
Trigger(s)	User determines that an existing Opportunity should be updated.
Pre-Conditions	1. User has access to Opportunities. 2. User has access to existing Opportunity that will be updated. 3. User is authorized to update existing Opportunity that will be updated. 4. User is in a location within the CRM system that allows the updating of Opportunities.
Post-Conditions	1. An Opportunity, and optionally an Opportunity-Product, has been updated in the CRM system.
Assumptions	1. Changes to an Opportunity's Project association are covered in Use Case Opportunity004. 2. A user who has access to an Opportunity always has access to its associated Opportunity-Products. 3. A relationship or association is established appropriately between the Opportunity and any records that are created from it during this Use Case.
Normal Flow	1. User navigates to existing Opportunity which will be updated. 2. System displays details for the Opportunity and its associated Opportunity-Product(s). 3. User updates relevant Opportunity and Opportunity-Product fields, and optionally: a. Creates, updates, or deletes associated Opportunity-Products. b. Establishes and/or updates the Opportunity's association to a single: i. Project ii. Account iii. Competitor Installed Base System iv. Siemens Installed Base System c. Establishes and/or updates the Opportunity's association to one or more: i. Contacts ii. Leads d. Establishes and/or updates a relationship between the Opportunity and one or more: i. Contacts e. Creates a single: i. Project ii. Competitor Installed Base System f. Creates one or more:

	i. Contacts ii. Appointments iii. Tasks 4. System accepts user's updates and displays updated Opportunity details.
Requirements	FR Opportunity003-001: The system shall allow a user to associate an Opportunity to a single Project, Account, or Competitor Installed Base System, and to one or more Contacts or Leads. [Step 3] FR Opportunity003-002: The system shall allow a user to establish and/or maintain a relationship between an Opportunity and one or more Contacts. [Step 3] FR Opportunity003-003: The system shall allow a user to create a single Project or Competitor Installed Base System from an Opportunity, and one or more Contacts, Appointments, or Tasks. [Step 3] FR Opportunity003-004: The system shall automatically associate an Opportunity to any records that are created from it. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Opportunity001-004: The system shall require an Opportunity to always be associated to at least one Opportunity-Product. [Step 3] FR Opportunity001-005: The system shall prevent the creation of duplicate Opportunities. [Step 3] FR Opportunity001-006: The system shall require an Opportunity to be associated to a verified Account that the user has visibility to. [Step 3]
Notes and Issues	1. It may be necessary to support Opportunities with multiple revenue line items (Opportunity-Products); pending decision after workshop with our service colleagues.

Use Case ID	Opportunity004
Use Case Name	Change an existing Opportunity's Project assignment
Use Case Description	To change an existing Opportunity's Project assignment in the CRM tool
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	User determines that an existing Opportunity's Project assignment should be changed.
Pre-Conditions	1. User has access to Opportunities. 2. User has access to existing Opportunity that will have its Project assignment changed. 3. User has access to the Project that the Opportunity will be assigned to. 4. User is authorized to change the existing Opportunity Project assignment. 5. User is in a location within the CRM system that allows the changing of an Opportunity's Project assignment.
Post-Conditions	1. An Opportunity has had its Project assignment changed in the CRM system.
Assumptions	1. An Opportunity can only be assigned to a single Project in the CRM system.
Normal Flow	1. User navigates to existing Opportunity which will have its Project assignment changed. 2. System displays Opportunity details. 3. User initiates change of Opportunity's assignment to a Project. 4. System displays a list of existing Projects that the Opportunity can be assigned to. 5. User selects an existing Project. 6. System accepts user's updates, changes Opportunity's assignment to selected Project, and updates the Opportunity's former and selected Projects appropriately.
Alternative Flow 1	**User changes an Opportunity's Project assignment from the Project** 1a. User navigates to existing Project which Opportunities will be assigned to. 2a. System displays Project details, including Opportunities that are currently assigned to the Project. 3a. User initiates assignment of Opportunities to Project. 4a. System displays list of Opportunities that can be assigned to Project. 5a. User selects one or more existing Opportunities. 6a. System accepts user's input, assigns selected Opportunities to Project, and updates their former and current Project(s) appropriately.
Alternative Flow 2	**User attempts to assign Opportunity to a Project that does not yet exist** 5b. User is unable to locate an appropriate existing Project, and executes **UC Opportunity005, Main Course (Create a new Pro-**

	ject and assign an Opportunity to it).
Requirements	FR Opportunity 004-001: The system shall allow an authorized user to change an individual Opportunity's assignment to any Project s/he has access to. [Step 3] FR Opportunity 004-002: The system shall allow an Opportunity to be assigned to any Project the user has visibility to. [Step 3] FR Opportunity 004-003: The system shall update a Project's Status appropriately when an Opportunity is added to or removed from it. [Step 6] FR Opportunity 004-004: The system shall allow an authorized user to maintain the list of Opportunities that are assigned to any Project s/he has access to. [Step 3a] FR Opportunity 004-005: The system shall allow an authorized user to assign multiple Opportunities to a Project at a single time. [Step 5a]
Requirements from other Use Cases that apply to this Use Case	FR Opportunity 006-004: The system shall allow a user to associate a Project to a single Account and one or more Opportunities. [Step 3]
Notes and Issues	N/A

Use Case ID	Opportunity005
Use Case Name	Create a new Project and assign an Opportunity to it
Use Case Description	To create a new Project and assign an Opportunity to it in the CRM tool
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	User is unable to identify an appropriate existing Project, and determines that a new Project should be created for the Opportunity in the CRM system.
Pre-Conditions	1. User has access to Opportunities. 2. User has access to existing Opportunity for which a new Project will be created. 3. User is authorized to create Projects. 4. User is authorized to change the existing Opportunity's Project assignment. 5. User is in a location within the CRM system that allows the creation of a Project.
Post-Conditions	1. A new Project has been created in the CRM system. 2. An existing Opportunity has been assigned to the newly-created Project in the CRM system.
Assumptions	1. An Opportunity can only be assigned to a single Project in the CRM system.
Normal Flow	1. User initiates creation of Project from an Opportunity. 2. System displays relevant fields. 3. User values relevant fields. 4. System creates Project, assigns Opportunity to the Project, and updates the Project appropriately.
Alternative Flow 1	**User creates a Project from the Projects list** 1a. User initiates creation of a new Project from the list of Projects in the CRM system. 2a. System displays relevant fields. 3a. User values relevant fields. 4a. System creates Project. 5a. User executes **UC Opportunity004, Alternate Flow 1 (User changes an Opportunity's Project assignment from the Project)**.
Requirements	FR Opportunity 005-001: The system shall allow an authorized user to create a Project from an Opportunity. [Step 1] FR Opportunity 005-002: The system shall automatically assign an Opportunity to a Project that is created from the Opportunity. [Step 4] FR Opportunity 005-003: The system shall allow an authorized user to create a Project from the list of Projects in the CRM system. [Step 1a]
Requirements from oth-	FR Opportunity 004-003: The system shall update a Project's Status

er Use Cases that apply to this Use Case	appropriately when an Opportunity is added to or removed from it. [Step 6] FR Opportunity 006-004: The system shall allow a user to associate a Project to a single Account and one or more Opportunities. [Step 3]
Notes and Issues	N/A

Use Case ID	Opportunity006
Use Case Name	Update a Project
Use Case Description	To update a Project in the CRM system
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	User determines that a Project should be updated in the CRM system.
Pre-Conditions	1. User has access to Projects. 2. User has access to existing Project which will be updated. 3. User is authorized to update the Project which will be updated. 4. User is in a location within the CRM system that allows the update of a Project.
Post-Conditions	1. A Project has been updated in the CRM system.
Assumptions	1. An association is established appropriately between the Project and any records that are created from it during this Use Case.
Normal Flow	1. User selects a Project to update. 2. System displays Project details, including the Project's attachments. 3. User updates Project details and/or attachments, and optionally: a. Associates the Project to a single Account. b. Associates the Project to one or more Opportunities. c. Creates one or more: i. Opportunities ii. Appointments iii. Tasks 4. System accepts user's updates and displays updated Project details.
Alternative Flow 1	**User deletes a Project** 1a. User selects a Project to delete. 2a. System displays Project details, including the Project's attachments. 3a. User deletes the Project. 4a. System accepts user's updates, deletes the Project, removes the Project assignment from all Opportunities that are currently assigned to the Project, and displays the updated Project list.
Requirements	FR Opportunity 006-001: The system shall allow an authorized user to maintain the attachments for a Project. [Step 3] FR Opportunity 006-002: The system shall allow a user to delete a Project. [Step 3a] FR Opportunity 006-003: The system shall remove the Project assignment from all Opportunities that are currently assigned to a Project when it is deleted. [Step 4a]

	FR Opportunity 006-004: The system shall allow a user to associate a Project to a single Account and one or more Opportunities. [Step 3] FR Opportunity 006-005: The system shall allow a user to create one or more Opportunities, Appointments, or Tasks from a Project. [Step 3] FR Opportunity 006-007: The system shall automatically associate a Project to any records that are created from it. [Step 3]
Requirements from other Use Cases that apply to this Use Case	FR Opportunity001-001: The system shall allow a user to create a new Opportunity and Opportunity-Product. [Step 3] FR Opportunity001-002: The system shall require a user to create a new Opportunity-Product when the user creates a new Opportunity. [Step 3] FR Opportunity001-003: The system shall associate an Opportunity-Product and Opportunity with each other when they are created together. [Step 3] FR Opportunity001-004: The system shall require an Opportunity to always be associated to at least one Opportunity-Product. [Step 3] FR Opportunity001-005: The system shall prevent the creation of duplicate Opportunities. [Step 3] FR Opportunity001-006: The system shall require an Opportunity to be associated to a verified Account that the user has visibility to. [Step 3]
Notes and Issues	N/A

Use Case ID	Opportunity007
Use Case Name	Copy an Opportunity
Use Case Description	To copy an Opportunity in the CRM system
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Key Account Manager, Remote Sales Support
Business Partner	Yes
Trigger(s)	User determines that an Opportunity should be copied in the CRM system.
Pre-Conditions	1. User has access to Opportunities. 2. User has access to existing Opportunity which will be copied. 3. User is authorized to copy Opportunities. 4. User is in a location within the CRM system that allows the copying of Opportunities.
Post-Conditions	1. A copy of an Opportunity has been created in the CRM system.
Assumptions	N/A
Normal Flow	1. User selects an Opportunity to copy. 2. System displays Opportunity details. 3. User initiates Opportunity copy. 4. System prompts user to value relevant fields. 5. User values relevant fields. 6. System accepts user's updates and displays the results of the copy.
Requirements	FR Opportunity 007-001: The system shall allow an authorized user to copy an Opportunity. [Step 3] FR Opportunity 007-002: The system shall determine which fields to copy, default, or prompt the user to value when an Opportunity is copied. [Step 4] FR Opportunity 007-003: The system shall determine which related objects to copy, default, or prompt the user to value when an Opportunity is copied. [Step 4]
Requirements from other Use Cases that apply to this Use Case	FR Opportunity001-001: The system shall allow a user to create a new Opportunity and Opportunity-Product. [Step 5] FR Opportunity001-002: The system shall require a user to create a new Opportunity-Product when the user creates a new Opportunity. [Step 5] FR Opportunity001-003: The system shall associate an Opportunity-Product and Opportunity with each other when they are created together. [Step 5] FR Opportunity001-004: The system shall require an Opportunity to always be associated to at least one Opportunity-Product. [Step 5]

	FR Opportunity001-005: The system shall prevent the creation of duplicate Opportunities. [Step 5] FR Opportunity001-006: The system shall require an Opportunity to be associated to a verified Account that the user has visibility to. [Step 5]
Notes and Issues	N/A

Use Case ID	Opportunity008
Use Case Name	Import business partner Opportunities
Use Case Description	To import a business partner's Opportunities from an external data source into the CRM system
Actor(s)	IM/CP Sales Manager, DX Sales Manager, Remote Sales Support, SHARE Country Administrator
Business Partner	Yes
Trigger(s)	User determines that Opportunities from a business partner's CRM system should be imported into the CRM system.
Pre-Conditions	1. User is authorized to import business partner Opportunities. 2. An external data source for the Opportunities that will be created in the CRM system exists. 3. User is in a location within the CRM system that allows the import of business partner Opportunities. 4. A mapping exists between Opportunities that will be updated in the CRM system and the corresponding Opportunities in the external data source. 5. A field-to-field mapping exists between the external data source and the CRM system.
Post-Conditions	1. New and potentially updated business partner Opportunities exist within the CRM system.
Assumptions	N/A
Normal Flow	1. User initiates import into CRM system. 2. System prompts user to select import file. 3. User selects import file. 4. System displays a preview of import results and prompts user to resolve any warnings or conflicts. 5. User resolves any warnings or conflicts and confirms import. 6. System: a. Creates new Opportunity and Opportunity-Product records appropriately, and/or b. Updates existing Opportunity and Opportunity-Product records appropriately.
Requirements	FR Opportunity008-001: The system shall allow a user to initiate an Opportunity import. [Step 1] FR Opportunity008-002: The system shall allow a user to import Opportunities from an external source. [Step 1] FR Opportunity008-003: The system shall allow a user to preview the results of an Opportunity import before the import takes place. [Step 4] FR Opportunity008-004: The system shall allow a user to resolve any warnings or conflicts associated with an import from within the CRM system. [Step 5]
Requirements from oth-	FR Opportunity001-001: The system shall allow a user to create a new

er Use Cases that apply to this Use Case	Opportunity and Opportunity-Product. [Step 5] FR Opportunity001-002: The system shall require a user to create a new Opportunity-Product when the user creates a new Opportunity. [Step 5] FR Opportunity001-003: The system shall associate an Opportunity-Product and Opportunity with each other when they are created together. [Step 5] FR Opportunity001-004: The system shall require an Opportunity to always be associated to at least one Opportunity-Product. [Step 5] FR Opportunity001-005: The system shall prevent the creation of duplicate Opportunities. [Step 5] FR Opportunity001-006: The system shall require an Opportunity to be associated to a verified Account that the user has visibility to. [Step 5]
Notes and Issues	N/A

4.7. Win/Loss

***Note about the Use Cases in this section**: The Win/Loss Use Case family may be expanded to include "lessons learned" reporting functionality during the SHARE Cloud project. Siemens Healthcare is currently evaluating these Use Cases to determine whether they should be handled by SHARE Cloud or by an external system.*

Use Case ID	Win-Loss Logic 001
Use Case Name	Sign an Opportunity
Use Case Description	To update an Opportunity and its associated Competitor Installed Base System when an Opportunity is Signed. An Opportunity is Signed when the customer signs a contract for it with Siemens Healthcare.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Remote Sales Support, Key Account Manager
Business Partner	Yes
Trigger(s)	1. User determines that an Opportunity should be marked as Signed in the CRM system.
Assumptions	N/A
Pre-Conditions	1. The Opportunity that will be marked as Signed exists in the CRM system. 2. User has access to the Opportunity that will be marked as Signed. 3. User is authorized to update the Opportunity that will be marked as Signed. 4. User has navigated to a list of Opportunities.
Post-Conditions	1. An Opportunity has been marked as Signed in the CRM system. 2. Any Competitor Installed Base record(s) associated to the Opportunity have been deactivated in the CRM system.
Normal Flow	1. User chooses an Opportunity currently marked as Active. 2. System displays detailed information about the Opportunity. 3. User marks the Opportunity as Signed. 4. System displays relevant fields. 5. User values relevant fields. 6. System stores update to Opportunity and its associated Project, if one exists, and initiates UC Installed Base 005 to deactivate each Competitor Installed Base System associated to the Opportunity.
Alternative Flow 1	**User changes a Signed Opportunity to Active** 1a. User chooses an Opportunity currently marked as Signed. 2a. System displays detailed information about the Opportunity. 3a. User marks the Opportunity as Active. 4a. System displays relevant fields. 5a. User values relevant fields. 6a. System stores update to Opportunity and its associated Project, if one exists, and initiates UC Installed Base 005 to reactivate

	each Competitor Installed Base System associated to the Solution.
Notes and Issues	• This UC is currently documented to reflect a user manually setting an Opportunity to Signed in OSC. However, we may decide **(pending sounding board feedback)** to set an Opportunity to Signed only via an automatic interface from CPQ that is triggered when a Quote is set to Signed in CPQ.
Requirements	FR Win-Loss_Logic001-001: The system shall allow a user to indicate that an Opportunity has been Signed. [Step 3] FR Win-Loss_Logic001-002: The system shall automatically initiate an internal process to deactivate any Competitor Installed Base System(s) associated to an Opportunity when it is marked as Signed or Lost. [Step 6] FR Win-Loss_Logic001-003: The system shall allow authorized users to indicate that a previously-Signed Opportunity is no longer Signed, but Active. [Step 3a] FR Win-Loss_Logic001-004: The system shall automatically initiate an internal process to reactivate any Competitor Installed Base System(s) associated to a previously-Signed/Lost Opportunity when it is marked as no longer Signed/Lost, but Active. [Step 6a] FR Win-Loss_Logic001-005: The system shall automatically update an Opportunity's associated Project appropriately when the Opportunity is marked as Signed, Lost, or Abandoned, or is marked as no longer Signed, Lost, or Abandoned, but Active. [Step 6]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	Win-Loss Logic 002
Use Case Name	Lose an Opportunity
Use Case Description	To update an Opportunity and the Competitor Installed Base when an Opportunity is Lost. An Opportunity is Lost when the customer signs a contract for it with one of Siemens' competitors.
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Remote Sales Support, Key Account Manager
Business Partner	Yes
Trigger(s)	1. User determines that an Opportunity should be marked as Lost in the CRM system.
Assumptions	N/A
Pre-Conditions	1. The Opportunity that will be marked as Lost exists in the CRM system. 2. User has access to the Opportunity that will be marked as Lost. 3. User is authorized to update the Opportunity that will be marked as Lost. 4. User has navigated to a list of Opportunities.
Post-Conditions	1. An Opportunity has been marked as Lost in the CRM system. 2. Any Competitor Installed Base record(s) associated to the Opportunity have been deactivated in the CRM system. 3. New Competitor Installed Base record(s) associated to the Opportunity have been created in the CRM system.
Normal Flow	1. User chooses an Opportunity currently marked as Active. 2. System displays detailed information about the Opportunity. 3. User marks the Opportunity as Lost. 4. System displays relevant fields. 5. User values relevant fields. 6. System stores update to Opportunity and its associated Project, if one exists, and: a. Initiates UC Installed Base 005 to deactivate Competitor Installed Base System(s) associated to the Solution. b. Initiates UC Installed Base 002 to create new Competitor Installed Base System(s) appropriately.
Alternative Flow 1	**User changes a Lost Opportunity to Active** 1a. User chooses an Opportunity currently marked as Lost. 2a. System displays detailed information about the Opportunity. 3a. User marks the Opportunity as Active. 4a. System displays relevant fields. 5a. User values relevant fields. 6a. System stores update to Opportunity and its associated Project, if one exists, and: a. Initiates UC Installed Base 005 to reactivate deactivated Competitor Installed Base System(s) associated to the Opportunity. b. Initiates UC Installed Base 005 to delete previously cre-

	ated Competitor Installed Base System(s) appropriately.
Input (Data Objects)	N/A
Notes and Issues	Is there a need to mark a Quote as "inactive" when its Opportunity is Lost or Abandoned? Discussion with the CPQ team needed.
Requirements	FR Win-Loss_Logic002-001: The system shall allow a user to indicate that an Opportunity has been Lost. [Step 3] FR Win-Loss_Logic002-002: The system shall allow authorized users to indicate that a previously-Lost Opportunity is no longer Lost, but Active. [Step 3a] FR Win-Loss_Logic002-003: The system shall automatically initiate an internal process to delete any Competitor Installed Base System(s) that were automatically created for a Lost Opportunity when it is marked as no longer Lost, but Active. [Step 6a] FR Win-Loss_Logic002-004: The system shall automatically initiate an internal process to create new Competitor Installed Base System(s) for a Lost Opportunity. [Step 6a]
Requirements from other Use Cases that apply to this Use Case	FR Win-Loss_Logic001-004: The system shall automatically initiate an internal process to reactivate any Competitor Installed Base System(s) associated to a previously-Signed/Lost Opportunity when it is marked as no longer Signed/Lost, but Active. [Step 6a] FR Win-Loss_Logic001-005: The system shall automatically update an Opportunity's associated Project appropriately when the Opportunity is marked as Signed, Lost, or Abandoned, or is marked as no longer Signed, Lost, or Abandoned, but Active. [Step 6] FR Win-Loss_Logic001-002: The system shall automatically initiate an internal process to deactivate any Competitor Installed Base System(s) associated to an Opportunity when it is marked as Signed or Lost. [Step 6]

Use Case ID	Win-Loss Logic 003
Use Case Name	Abandon an Opportunity
Use Case Description	To update an Opportunity in the CRM system when it is Abandoned. An Opportunity is Abandoned when a customer decides to no longer pursue it with any vendor (neither Siemens Healthcare nor any competitor).
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Remote Sales Support, Key Account Manager
Business Partner	Yes
Trigger(s)	1. User determines that an Opportunity should be marked as Abandoned in the CRM system.
Assumptions	N/A
Pre-Conditions	1. The Opportunity that will be marked as Abandoned exists in the CRM system. 2. User has access to the Opportunity that will be marked as Abandoned. 3. User is authorized to update the Opportunity that will be marked as Abandoned. 4. User has navigated to a list of Opportunities.
Post-Conditions	1. An Opportunity has been marked as Abandoned in the CRM system.
Normal Flow	1. User chooses an Opportunity currently marked as Active. 2. System displays detailed information about the Opportunity. 3. User marks the Opportunity as Abandoned. 4. System displays relevant fields. 5. User values relevant fields. 6. System stores update to Opportunity and its associated Project, if one exists.
Alternate Flow 1	**User changes an Abandoned Opportunity to Active** 1a. User chooses an Opportunity currently marked as Abandoned. 2a. System displays detailed information about the Opportunity. 3a. User marks the Opportunity as Active. 4a. System displays relevant fields. 5a. User values relevant fields. 6a. System stores update to Opportunity and its associated Project, if one exists.
Notes and Issues	Is there a need to mark a Quote as "inactive" when its Opportunity is Lost or Abandoned? Discussion with the CPQ team needed.
Requirements	FR Win-Loss_Logic003-001: The system shall allow a user to indicate that an Opportunity has been Abandoned. [Step 3] FR Win-Loss_Logic003-002: The system shall allow authorized users to indicate that a previously-Abandoned Opportunity is no longer Abandoned, but Active. [Step 3a]

Requirements from other Use Cases that apply to this Use Case	FR Win-Loss_Logic001-005: The system shall automatically update an Opportunity's associated Project appropriately when the Opportunity is marked as Signed, Lost, or Abandoned, or is marked as no longer Signed, Lost, or Abandoned, but Active. [Step 6]

4.8. Social Network

Use Case ID	SocialNetwork001
Use Case Name	Create a team conversation
Use Case Description	To create a team conversation for a record in the CRM system. The user who creates a team conversation owns the conversation; the owner is able to administer a conversation's participants list / settings and transfer ownership to another user. Authorized individuals who are not CRM system users are able to participate in, but cannot administer, social network conversations.
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	A user determines that a team conversation should be created for a record in the CRM system.
Pre-Conditions	1. The user is authorized to create a team conversation for the record that a conversation will be created for in the CRM system. 2. The user has navigated to the record that a team conversation will be created for in the CRM system.
Post-Conditions	1. A new team conversation exists and is associated to an Account, Opportunity, Lead, or Project in the CRM system.
Assumptions	N/A
Normal Flow	1. User initiates creation of team conversation from a specific record. 2. System displays relevant fields, including default settings and participants. 3. User values fields, modifies settings and participants and publishes conversation. 4. System stores information, creates conversation, and notifies participants appropriately.
Alternative Flow 1	**User creates team conversation from a list of team conversations** 1a. User initiates creation of team conversation from a list of team conversations. 2a. System shows relevant fields for new conversation, including default settings and participants. 3a. User values fields, modifies settings and participants, optionally associates conversation to one of the following types of records, and publishes the conversation: a. Account b. Opportunity c. Lead d. Project 4a. System stores information, creates conversation, and notifies participants appropriately.
Requirements	SocialNetwork001-001: The system shall allow a user to create a team

	conversation from a record. [Step 1] SocialNetwork001-002: The system shall allow a user to create a team conversation from a list of team conversations. [Step 1a] SocialNetwork001-003: The system shall notify conversation participants when a new team conversation is created. [Step 4] SocialNetwork001-004: The system shall provide a filtered list of available participants when a user adds participants to a conversation. [Step 3] SocialNetwork001-005: The system shall allow an administrator to define the default participant list for new conversations by record type. [Step 2] SocialNetwork001-006: The system shall allow an administrator to control which fields are always automatically published and which are optionally automatically published to a conversation when they are updated. [Step 2] SocialNetwork001-007: The system shall allow an authorized user to control whether fields that an administrator has marked as optionally published are automatically published to a conversation when they are updated. [Step 3] SocialNetwork001-008: The system shall allow a user to enable or disable his/her conversation updates for all conversations at a global level. [Step 4] SocialNetwork001-009: The system shall allow a user to enable or disable his/her conversation updates for a specific type of record at a global level. [Step 4] SocialNetwork001-010: The system shall allow a user to control how often he/she receives bundled conversation updates at a global level. [Step 4] SocialNetwork001-011: The system shall allow a user to override his/her global conversation update preferences for a specific conversation. [Step 4] SocialNetwork001-012: The system shall allow an authorized user to set the level of privacy for a conversation. [Step 1] SocialNetwork001-013: The system shall allow an authorized user to associate a conversation to an Account, Opportunity, Lead, or Project. [Step 1]

	SocialNetwork001-014: The system shall prevent a conversation from being associated to more than one record. [Step 1] SocialNetwork001-015: The system shall prevent a conversation's record association from being changed. [Step 4] SocialNetwork001-016: The system shall allow a conversation owner to invite authorized non-CRM system users to a team conversation. [Step 3]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	SocialNetwork002
Use Case Name	Administer settings and participants for an existing team conversation
Use Case Description	To administer a conversation's participants and settings in the CRM system. The user who creates a team conversation owns the conversation; the owner is able to administer a conversation's participants list / settings and transfer ownership to another user. Authorized individuals who are not CRM system users are able to participate in, but cannot administer, social network conversations.
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	A user determines that the settings and participants for an existing team conversation should be administered in the CRM system.
Pre-Conditions	1. The user is authorized to maintain the settings and participants for the team conversation that will be maintained in the CRM system. 2. The user has navigated to a location that allows the maintenance of team conversation settings and participants in the CRM system.
Post-Conditions	1. The settings and/or participants for a team conversation have been maintained in the CRM system.
Assumptions	1. Users who are authorized to maintain the settings and participants for a conversation include: a. The conversation's owner b. Authorized administrators
Normal Flow	1. User selects a conversation to modify. 2. System shows relevant fields, including settings and participants. 3. User modifies relevant fields, settings, and participants. 4. System stores information and notifies participants appropriately.
Alternative Flow 1	**User closes an existing team conversation** 1a. User selects a conversation to close. 2a. System shows relevant fields, including settings and participants. 3a. User closes conversation. 4a. System stores update to conversation, marks it read-only, and notifies participants appropriately.
Alternative Flow 2	**User reopens a closed team conversation** 1b. User selects a closed conversation to reopen. 2b. System shows relevant fields, including settings and participants. 3b. User reopens conversation. 4b. System stores update to conversation, marks it read-write, and notifies participants appropriately.
Requirements	SocialNetwork002-001: The system shall allow an authorized user to modify settings and participants for a team conversation. [Step 3]

	SocialNetwork002-002: The system shall notify participants appropriately when a team conversation's settings or participant list are modified. [Step 4] SocialNetwork002-003: The system shall allow an authorized user to close a team conversation. [Step 1a] SocialNetwork002-004: The system shall set a team conversation to read-only when it is closed. [Step 4a] SocialNetwork002-005: The system shall notify participants appropriately when a team conversation is closed. [Step 4a] SocialNetwork002-006: The system shall allow an authorized user to reopen a closed a team conversation. [Step 1b] SocialNetwork002-007: The system shall set a closed team conversation to read-write when it is reopened. [Step 4b] SocialNetwork002-008: The system shall notify participants appropriately when a closed team conversation is reopened. [Step 4b]
Requirements from other Use Cases that apply to this Use Case	SocialNetwork001-004: The system shall provide a filtered list of available participants when a user adds participants to a conversation. [Step 3] SocialNetwork001-007: The system shall allow an authorized user to control whether fields that an administrator has marked as optionally published are automatically published to a conversation when they are updated. [Step 3] SocialNetwork001-008: The system shall allow a user to enable or disable his/her conversation updates for all conversations at a global level. [Step 4] SocialNetwork001-009: The system shall allow a user to enable or disable his/her conversation updates for a specific type of record at a global level. [Step 4] SocialNetwork001-010: The system shall allow a user to control how often he/she receives bundled conversation updates at a global level. [Step 4] SocialNetwork001-011: The system shall allow a user to override his/her global conversation update preferences for a specific conversation. [Step 4]

	SocialNetwork001-012: The system shall allow an authorized user to set the level of privacy for a conversation. [Step 3] SocialNetwork001-013: The system shall allow an authorized user to associate a conversation to an Account, Opportunity, Lead, or Project. [Step 3] SocialNetwork001-014: The system shall prevent a conversation from being associated to more than one record. [Step 3] SocialNetwork001-015: The system shall prevent a conversation's record association from being changed. [Step 3] SocialNetwork001-016: The system shall allow a conversation owner to invite authorized non-CRM system users to a team conversation. [Step 3]

Use Case ID	SocialNetwork003
Use Case Name	Participate in an existing team conversation
Use Case Description	To participate in an existing team conversation in the CRM system. A user who is on the participant list for a team conversation but is not the owner of the conversation is able to review and share conversation updates, but is not able to administer a conversation's participants list / settings or transfer ownership to another user. Authorized individuals who are not CRM system users are able to participate in, but cannot administer, social network conversations.
Actor(s)	All Personas (including authorized non-CRM system users)
Business Partner	Yes
Trigger(s)	A user determines s/he should participate in an existing team conversation in the CRM system.
Pre-Conditions	1. The team conversation that the user will participate in exists in the CRM system. 2. The user is a member of the team conversation in the CRM system that s/he will participate in. 3. The user has navigated to a location that allows participation in team conversations in the CRM system.
Post-Conditions	1. A team conversation has been updated in the CRM system.
Assumptions	1. A user is authorized to participate in an existing team conversation in the CRM system if s/he is a member of its participants list.
Normal Flow	1. User selects a conversation to participate in. 2. System shows relevant fields, conversation details, and participants. 3. User provides a conversation update. 4. System stores conversation update and notifies participants appropriately.
Requirements	SocialNetwork003-001: The system shall allow an authorized user to provide an update to a team conversation. [Step 3] SocialNetwork003-002: The system shall notify conversation participants appropriately when a team conversation is updated. [Step 4]
Requirements from other Use Cases that apply to this Use Case	SocialNetwork001-008: The system shall allow a user to enable or disable his/her conversation updates for all conversations at a global level. [Step 4] SocialNetwork001-009: The system shall allow a user to enable or disable his/her conversation updates for a specific type of record at a global level. [Step 4] SocialNetwork001-010: The system shall allow a user to control how often he/she receives bundled conversation updates at a global level. [Step 4]

	SocialNetwork001-011: The system shall allow a user to override his/her global conversation update preferences for a specific conversation. [Step 4]

Use Case ID	SocialNetwork004
Use Case Name	Join an existing team conversation
Use Case Description	To manually join an existing team conversation as a participant in the CRM system. A user who is on the participant list for a team conversation but is not the owner of the conversation is able to review and share conversation updates, but is not able to administer a conversation's participants list / settings or transfer ownership to another user. Authorized individuals who are not CRM system users are able to participate in, but cannot administer, social network conversations.
Actor(s)	All Personas
Business Partner	Yes
Trigger(s)	A user determines s/he should manually join an existing team conversation in the CRM system.
Pre-Conditions	1. The team conversation that the user will manually join exists in the CRM system. 2. The user is authorized to manually join the participants list for the team conversation in the CRM system that s/he will participate in. 3. The user has navigated to a location that allows him/her to manually join team conversations in the CRM system.
Post-Conditions	1. The participants list for a team conversation has been updated in the CRM system.
Assumptions	1. A user is authorized to manually join the participants list for an existing team conversation in the CRM system if the conversation's privacy settings allow it.
Normal Flow	1. User selects a conversation to join. 2. System shows relevant fields and participants. 3. User joins the conversation. 4. System adds user to conversation's participant list, notifies participants appropriately, and displays conversation details. 5. User reviews the conversation details and optionally executes UC SocialNetwork003 (Participate in an existing team conversation).
Requirements	SocialNetwork004-001: The system shall allow an authorized user to manually join a team conversation. [Step 3]
Requirements from other Use Cases that apply to this Use Case	SocialNetwork001-008: The system shall allow a user to enable or disable his/her conversation updates for all conversations at a global level. [Step 4] SocialNetwork001-009: The system shall allow a user to enable or disable his/her conversation updates for a specific type of record at a global level. [Step 4] SocialNetwork001-010: The system shall allow a user to control how often he/she receives bundled conversation updates at a global level. [Step 4]

	SocialNetwork001-011: The system shall allow a user to override his/her global conversation update preferences for a specific conversation. [Step 4]

Use Case ID	SocialNetwork005
Use Case Name	Leave an existing team conversation
Use Case Description	To manually leave the participant list for a team conversation.
Actor(s)	All Personas, including non-CRM system users
Business Partner	Yes
Trigger(s)	A user determines s/he should manually leave an existing team conversation in the CRM system.
Pre-Conditions	1. The team conversation that the user will manually leave exists in the CRM system. 2. The user is a member of the participants list for the team conversation that s/he will manually leave in the CRM system. 3. The user has navigated to a location that allows him/her to manually leave team conversations in the CRM system.
Post-Conditions	1. The participants list for a team conversation has been updated in the CRM system.
Assumptions	N/A
Normal Flow	1. User selects a conversation to leave. 2. System shows relevant fields, conversation details, and participants. 3. User leaves the conversation. 4. System removes user from conversation's participant list and notifies participants appropriately.
Requirements	SocialNetwork005-001: The system shall allow an authorized user to manually leave a team conversation. [Step 3]
Requirements from other Use Cases that apply to this Use Case	SocialNetwork001-008: The system shall allow a user to enable or disable his/her conversation updates for all conversations at a global level. [Step 4] SocialNetwork001-009: The system shall allow a user to enable or disable his/her conversation updates for a specific type of record at a global level. [Step 4] SocialNetwork001-010: The system shall allow a user to control how often he/she receives bundled conversation updates at a global level. [Step 4] SocialNetwork001-011: The system shall allow a user to override his/her global conversation update preferences for a specific conversation. [Step 4]

4.9. Products

A Product is a representation at the Opportunity level of the item that will be configured for sale in the CPQ system.

Use Case ID	Products001
Use Case Name	Import product data into CRM system
Use Case Description	To import product data into the CRM system from an external source.
Actor(s)	CRM system (interface), External Product Source (interface), System Administrator
Business Partner	No
Trigger(s)	Administrator determines that data load should occur.
Pre-Conditions	1. Administrator is authorized to initiate product data load process. 2. External product source exists in predefined format. 3. Interface exists to load products from external source.
Post-Conditions	1. Products have been imported into the CRM system from external source.
Assumptions	N/A
Normal Flow	1. Administrator initiates product data load process. 2. System creates product data in CRM system from external source.
Alternative Flow 1	**System updates existing product records** 2a. System determines that product data from external source already exists in CRM system, and updates product data in CRM system accordingly.
Requirements	FR Products001-001: The system shall allow an administrator to initiate or schedule a product data load process. [Step 1] FR Products001-002: The system shall create product data in the CRM system from an external source. [Step 2] FR Products001-003: The system shall determine whether product data in an external source already exists in the CRM system. [Step 2a] FR Products001-004: The system shall update existing data in the CRM system from an external source. [Step 2a] FR Products 001-005: The system shall deactivate, but not delete, product data in the CRM system when a product data load takes place. [Step 2a]
Requirements from oth-	N/A

er Use Cases that apply to this Use Case	
Notes and Issues	1. It needs to be checked if DX and Service fit into the existing product structure (GG → GZ → Product) that was established in the Proof of Concept. If so, define the types of "Products" they will load (Systems for EQ, Assays for DX, and Service Systems for Service?). 2. It needs to be checked if the new organizational structure at Siemens Healthcare requests any changes to the existing product structure (GG → GZ → Product) that was established in the Proof of Concept. 3. There may be multiple scheduled product data load interfaces with different triggers. For example, in our current CRM system we have a manually-initiated quarterly product data load, an automatically-initiated weekly product data load, and an automatically-initiated daily product data load.

<table>
<tr><th>Use Case ID</th><th>Products002</th></tr>
<tr><td>Use Case Name</td><td>Maintain product data in the CRM system</td></tr>
<tr><td>Use Case Description</td><td>To maintain product data into the CRM system.</td></tr>
<tr><td>Actor(s)</td><td>SHARE System Administrator</td></tr>
<tr><td>Business Partner</td><td>No</td></tr>
<tr><td>Trigger(s)</td><td>Administrator determines that updates to product data in the CRM system are necessary.</td></tr>
<tr><td>Pre-Conditions</td><td>1. The product data to be updated already exists in the CRM system.
2. The administrator has access to the product data that will be updated.
3. The administrator is authorized to update the product data that will be updated.</td></tr>
<tr><td>Post-Conditions</td><td>1. Product data has been updated in the CRM system.</td></tr>
<tr><td>Assumptions</td><td>1. This Use Case is intended to be used only for emergency updates to product data in the CRM system. Any changes to product data that are made through this Use Case will be overwritten the next time UC Products001 is executed.
2. Any updates that are made to product data in the CRM system through this Use Case will also be made to product master data (in an external system) so that they are reflected in the CRM system the next time UC Products001 is executed.</td></tr>
<tr><td>Normal Flow</td><td>1. Administrator navigates to the product data to be updated.
2. System displays details about the product data to be updated.
3. Administrator updates product data.
4. System accepts admin's updates and displays updated product data.</td></tr>
<tr><td>Alternative Flow 1</td><td>N/A</td></tr>
<tr><td>Requirements</td><td>FR Products002-001: The system shall allow an authorized administrator to maintain product data. [Step 3]

FR Products002-002: The system shall allow an administrator to review additional information about selected product data. [Step 2]

FR Products002-003: The system shall indicate to a user which fields on product data s/he is authorized to update. [Step 2]</td></tr>
<tr><td>Requirements from other Use Cases that apply to this Use Case</td><td>N/A</td></tr>
<tr><td>Notes and Issues</td><td>N/A</td></tr>
</table>

4.10. Interfaces: CPQ

The term 'interface' describes an established data exchange or connection between two systems or between two parts of the same system. For example, an interface exists between the CRM and CPQ systems to allow them to exchange Opportunity and Project data.

***Note about the Use Cases in this section**: The CPQ Interface Use Cases will evolve over time as the CPQ Project progresses through development. Joint work sessions between the SHARE Cloud and CPQ project teams will be required to guide the evolution of these use cases during the SHARE Cloud project.*

Use Case ID	CPQInterface001
Use Case Name	Request a Configuration for one or more Opportunities
Use Case Description	To request a new CPQ Configuration for one or more Opportunities
Actor(s)	IM/CP Account Executive, DX Account Executive, Service Sales Executive, Remote Sales Support
Business Partner	Yes
Trigger(s)	1. User determines a need to request a new CPQ Configuration for one or more Opportunities. 2. Optionally, user determines a need to request a change to an existing CPQ Configuration.
Pre-Conditions	1. User has access to Opportunities which require a Configuration. 2. One or more Opportunities exist which have yet to be configured, and each Opportunity requires a Configuration. 3. User has navigated to a list of Opportunities.
Post-Conditions	1. A configuration request notification has been sent to the appropriate Product Specialist(s).
Assumptions	1. Configuration refers to the combination of products and pricing that describes the Quote for an Opportunity. a. An Opportunity specifies the type of product that will be configured in a Quote (for example, Magnetom Avanto MRI Machine). A Configuration describes the exact combination of parts, options, and pricing that the Opportunity represents (for example, Magnetom Avanto MRI Machine with a beige patent tray table, a certain type of monitor and analysis software, a 10% discount for a loyal customer, and so on). 2. User is in a location within the CRM System that allows for configuration requests. 3. A single Opportunity can only be included in one Quote. 4. The Product Specialist role can be fulfilled by a variety of employee types across different countries, including dedicated PSEs, Central Quote Desk employees, AEs, and so on.
Normal Flow	1. User initiates a configuration request for one or multiple Opportunities. 2. System displays relevant fields by Opportunity.

	3. User values relevant fields by Opportunity. 4. System sends a configuration request for a single Quote to the appropriate CPQ user(s).
Alternative Flow 1	**User requests a new Configuration and Quote for one or more Opportunities that are already included in a Quote** 2a. System prevents user from requesting a new Configuration and Quote because the Opportunity is already included in a Quote. Go back to Step 1.
Alternative Flow 2	**User requests a change to an existing Configuration** 1b. User initiates a configuration change request for one or multiple Opportunities. 2b. System displays relevant fields by Opportunity. 3b. User values relevant fields by Opportunity. 4b. System sends a configuration change request to the appropriate CPQ user(s).
Issues and Notes	When a user requests a new configuration and Quote in the main course, he can optionally enter comments for each Opportunity that he is submitting a request for. These comments may include a variety of instructions, including a request for the Opportunity's configuration to be added to an existing Quote or for a different revision of the Quote to be made "Active." A Quote can have many revisions in the CPQ tool. Only one Quote revision can be "Active" and linked to its associated Opportunities at one time. The Quote revision which is "Active" in CPQ can be changed by a CPQ user. For this Use Case, "a list of Opportunities" means anywhere that a list of Opportunities exists. At a minimum, this includes the Opportunity list, the Account → Opportunity list, and the Project → Opportunity list. It may be necessary to support Opportunities with multiple revenue line items; pending decision after workshop with our service colleagues. If a new configuration or a configuration change is requested for multiple Opportunities within the same request and the Opportunity Products are cross-modality (from different Business Units) then the request must be submitted to multiple recipients (i.e. the appropriate CPQ users from the different modalities).
Requirements	FR CPQInterface001-001: The system shall allow a user to initiate a configuration request for one or multiple Opportunities. [Step 1] FR CPQInterface001-002: The system shall submit a user's configuration request to the appropriate CPQ user(s). [Step 4] FR CPQInterface001-003: The system shall prevent a user from requesting a new Configuration and Quote for Opportunities that are

	already included in a Quote. [Step 2a] FR CPQInterface001-004: The system shall allow a user to initiate a configuration change request for one or multiple Opportunities. [Step 1b] FR CPQInterface001-005: The system shall submit a user's configuration change request to the appropriate CPQ user(s). [Step 4b]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	CPQInterface002
Use Case Name	Update existing CRM Opportunity and Opportunity-Product from CPQ Configuration
Use Case Description	To update relevant data of an existing Opportunity and its associated Opportunity-Product in the CRM System from a Configuration in the CPQ System
Actor(s)	CPQ user (non-CRM user), CPQ system (interface), CRM system (interface)
Business Partner	Yes
Trigger(s)	CPQ user saves Configuration(s) to the CRM system, and the Configuration(s) contain changes to an Opportunity and/or its Opportunity-Product(s).
Pre-Conditions	1. CPQ user has modified an existing CPQ Configuration which is already associated to an Opportunity in the CRM system.
Post-Conditions	1. Existing Opportunity and its associated Opportunity-Product(s) in the CRM System are updated with relevant Quote configuration data from CPQ System.
Assumptions	1. A CPQ Quote can contain one or more Configurations. 2. Configuration refers to the combination of products and pricing that describes the Quote for an Opportunity. a. An Opportunity specifies the type of product that will be configured in a Quote (for example, Magnetom Avanto MRI Machine). A Configuration describes the exact combination of parts, options, and pricing that the Opportunity represents (for example, Magnetom Avanto MRI Machine with a beige patent tray table, a certain type of monitor and analysis software, a 10% discount for a loyal customer, and so on). 3. A Configuration in the CPQ System is associated to an Opportunity and its Opportunity-Product(s) in the CRM System.
Normal Flow	1. CPQ user selects a Configuration in the CPQ tool and initiates the “Update CRM” process. 2. CPQ System sends relevant Configuration and Quote data to the CRM System. 3. CRM System accepts the relevant Configuration and Quote data, updates corresponding Opportunity and/or Opportunity-Product(s) appropriately, and notifies their associated CRM users appropriately. 4. CPQ System notifies CPQ user that “Update CRM” process was successful.
Alternative Flow 1	**Connectivity fails between CPQ System and CRM System** 3a. CRM System does not accept the relevant Configuration and Quote data and does not update corresponding Opportunity and/or Opportunity-Product(s). 4a. CPQ System notifies CPQ user that “Update CRM” process has failed.
Requirements	FR CPQInterface002-001: The system shall accept configuration and

	Quote data from the CPQ system. [Step 3] FR CPQInterface002-002: The system shall update Opportunity and Opportunity-Product data appropriately when it receives configuration and Quote data from the CPQ system. [Step 3] FR CPQInterface002-003: The system shall notify users appropriately when an Opportunity and/or Opportunity-Product have been updated with configuration and Quote data from the CPQ system. [Step 3]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	CPQInterface003
Use Case Name	Launch an existing CPQ Configuration from a CRM Opportunity
Use Case Description	To launch an existing CPQ Configuration in the CPQ System from an Opportunity in the CRM System.
Actor(s)	Key Account Manager, IM/CP Account Executive, DX Account Executive, Service Sales Executive, IM/CP Sales Manager, DX Sales Manager, Service Sales and Business Manager, IM/CP Business Manager, DX Business Manager, IM/CP Product Specialist, DX Product Specialist, Remote Sales Support, Back Office Specialist
Business Partner	Yes
Trigger(s)	CRM user wishes to view and/or update CPQ Configuration for an Opportunity in the CRM system.
Pre-Conditions	1. CRM user has navigated to a list of Opportunities in the CRM system. 2. The Opportunity for which CPQ Configuration will be reviewed and/or updated exists in the CRM system and is associated to an existing CPQ Configuration. 3. CRM user is set up as a CPQ user in the CPQ system. 4. CRM user has access to the Configuration which will be reviewed in the CPQ system. 5. CRM user is authorized to make any Configuration updates that will be made in the CPQ system.
Post-Conditions	1. CPQ system has been launched and displays the Configuration associated with the Opportunity that the CRM user selected.
Assumptions	1. A CPQ Quote can contain one or more Configurations. 2. Configuration refers to the combination of products and pricing that describes the Quote for an Opportunity. a. An Opportunity specifies the type of product that will be configured in a Quote (for example, Magnetom Avanto MRI Machine). A Configuration describes the exact combination of parts, options, and pricing that the Opportunity represents (for example, Magnetom Avanto MRI Machine with a beige patent tray table, a certain type of monitor and analysis software, a 10% discount for a loyal customer, and so on). 3. A Configuration in the CPQ System is associated to an Opportunity and its Opportunity-Product(s) in the CRM System.
Normal Flow	1. CRM user selects an Opportunity in the CRM system and initiates CPQ for the Opportunity's CPQ Configuration. 2. CPQ system launches and displays the Configuration associated to the Opportunity.
Alternative Flow 1	**Connectivity fails between CRM System and CPQ System** 2a. CRM System notifies user that CPQ System has failed to launch.
Requirements	FR CPQInterface003-001: The system shall allow a user to view an Opportunity's associated Configuration in the CPQ system. [Step 2] FR CPQInterface003-002: The system shall notify a user if the CPQ

	system cannot be launched. [Step 2a]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	CPQInterface004
Use Case Name	Initiate creation of a new CPQ Configuration from an Opportunity in the CRM system
Use Case Description	To launch CPQ and initiate the creation of a new CPQ configuration from an Opportunity in the CRM system.
Actor(s)	IM/CP Product Specialist, DX Product Specialist, IM/CP Account Executive, DX Account Executive, Service Sales Executive
Business Partner	Yes
Trigger(s)	User determines that a new CPQ Configuration should be created for an Opportunity in the CRM system.
Pre-Conditions	1. The Opportunity for which a new CPQ Configuration will be created exists in the CRM tool and is not associated to an existing CPQ Configuration. 2. The CRM user is set up as a CPQ user in the CPQ system. 3. The CRM user is authorized to create new CPQ Configurations in the CPQ tool. 4. The CRM user has navigated to a list of Opportunities.
Post-Conditions	1. A new CPQ Configuration has been initiated in the CPQ tool for the Opportunity. 2. The CPQ tool has been launched and is displaying the newly-initiated CPQ Configuration.
Assumptions	1b. Configuration refers to the combination of products and pricing that describes the Quote for an Opportunity. a. An Opportunity specifies the type of product that will be configured in a Quote (for example, Magnetom Avanto MRI Machine). A Configuration describes the exact combination of parts, options, and pricing that the Opportunity represents (for example, Magnetom Avanto MRI Machine with a beige patent tray table, a certain type of monitor and analysis software, a 10% discount for a loyal customer, and so on).
Normal Flow	1. CRM user selects an Opportunity and initiates the creation of a new CPQ Configuration for it. 2. CRM system passes relevant information about the Opportunity and its associated Opportunity-Product(s) to the CPQ system. 3. CPQ system launches, accepts information from the CRM system, initiates a new CPQ Configuration using that information, and displays the newly-initiated Configuration.
Alternative Flow 1	**Connectivity fails between CRM System and CPQ System** 2a. CRM system notifies user that data transfer has failed.
Alternative Flow 2	**Opportunity is associated to an existing CPQ Configuration** 2b. CRM system prevents user from initiating a new CPQ Configuration for the Opportunity because it is already associated to an existing CPQ Configuration.
Requirements	FR CPQInterface004-001: The system shall allow a user to initiate the creation of a new CPQ Configuration for an Opportunity. [Step 1]

 Confidential

	FR CPQInterface004-002: The system shall provide relevant information about an Opportunity and its associated Opportunity-Product(s) to the CPQ system when a user initiates the creation of a new CPQ Configuration for an Opportunity from the CRM system. [Step 2] FR CPQInterface004-003: The system shall support an interface that allows the CPQ system to retrieve relevant information about an Opportunity and its associated Opportunity-Product(s) on an as-needed basis. [Step 2] FR CPQInterface004-004: The system shall notify a user when data transfer to the CPQ system fails. [Step 2a] FR CPQInterface004-005: The system shall prevent a user from initiating the creation of a new CPQ Configuration for an Opportunity that is already associated to an existing CPQ Configuration. [Step 2b]
Requirements from other Use Cases that apply to this Use Case	N/A
Notes and Issues	N/A

4.11. Interfaces: All Other Interfaces

Use Case ID	OtherInterfaces001
Use Case Name	ERP system updates CRM system when Order is Booked
Use Case Description	To update an Opportunity in the CRM system when its associated Order has been Booked in the ERP system.
Actor(s)	ERP system (interface), CRM system (interface)
Business Partner	No
Trigger(s)	1. An Order is booked in the ERP system.
Assumptions	1. The ERP system automatically initiates an interface to update the CRM system when an Order is booked. 2. An interface that allows for the updating of Opportunities in the CRM system when an Order is booked exists.
Pre-Conditions	1. The Opportunity that will be updated exists in the CRM system. 2. The Opportunity that will be updated is associated to the Order that has been booked in the ERP system.
Post-Conditions	1. An Opportunity has been marked as Booked in the CRM system. 2. An Opportunity has been updated appropriately in the CRM system.
Normal Flow	1. ERP system books an Order and automatically initiates an interface to update Opportunities in the CRM system for the Order's associated Opportunities. 2. CRM System accepts updates from the interface, marks the Opportunities as Booked, and updates the Opportunities appropriately.
Notes and Issues	This interface may involve communication from the ERP system directly to the CRM system, or it may involve communication from the ERP system to the C-P-Q system and then from the C-P-Q system to the CRM system. There is no way for a user to move a Booked Opportunity back to a status of Active. If a Booked Order is cancelled in the ERP system, the Booked Opportunity is marked as cancelled in the CRM system. This is handled by an interface from the ERP system.
Requirements	FR OtherInterfaces001-001: The system shall provide an interface that allows the ERP system to update an Order's associated Opportunities appropriately when the Order is booked in the ERP system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces002
Use Case Name	ERP system updates CRM system when Order is Cancelled
Use Case Description	To update an Opportunity in the CRM system when its associated Order has been cancelled in the ERP system.
Actor(s)	ERP system (interface), CRM system (interface)
Business Partner	No
Trigger(s)	1. An Order is cancelled in the ERP system.
Assumptions	1. The ERP system automatically initiates an interface to update the CRM system when an Order is cancelled. 2. An interface that allows for the updating of Opportunities in the CRM system when an Order is cancelled exists.
Pre-Conditions	1. The Opportunity that will be updated exists in the CRM system. 2. The Opportunity that will be updated is associated to the Order in the ERP system.
Post-Conditions	1. An Opportunity has been updated in the CRM system.
Normal Flow	1. ERP system cancels an Order and initiates the interface that updates Opportunities in the CRM system for the Order's associated Opportunities. 2. CRM system accepts updates from the interface and updates the Order's associated Opportunities appropriately.
Notes and Issues	N/A
Requirements	FR OtherInterfaces002-001: The system shall provide an interface that allows the ERP system to update an Order's associated Opportunities when the Order is cancelled in the ERP system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces003
Use Case Name	ERP system updates CRM system when Order is Modified
Use Case Description	To update an Opportunity in the CRM system when its associated Order has been modified in the ERP system.
Actor(s)	ERP system (interface), CRM system (interface)
Business Partner	No
Trigger(s)	1. An Order is modified in the ERP system.
Assumptions	1. The ERP system automatically initiates an interface to update the CRM system when an Order is modified. 2. An interface that allows for the updating of Opportunities in the CRM system when an Order is modified exists.
Pre-Conditions	1. The Opportunity that will be updated exists in the CRM system. 2. The Opportunity that will be updated is associated to the Order in the ERP system.
Post-Conditions	1. An Opportunity has been updated appropriately in the CRM system.
Normal Flow	1. ERP system modifies an Order and initiates the interface that updates Opportunities in the CRM system for the Order's associated Opportunities. 2. CRM system accepts updates from the interface and updates the Order's associated Opportunities appropriately.
Notes and Issues	N/A
Requirements	FR OtherInterfaces003-001: The system shall provide an interface that allows the ERP system to update an Order's associated Opportunities appropriately when the Order is modified in the ERP system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces004
Use Case Name	Interface data from CRM system to Outlook
Use Case Description	To synchronize data that has been created or modified in the CRM system to a user's Outlook application.
Actor(s)	Outlook (interface), CRM system (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize data from the CRM system to a user's Outlook application is initiated by either a user action or an automatic system process.
Assumptions	1. An interface to synchronize data from the CRM system to a user's Outlook application can be initiated by either a user action or an automatic system process. 2. A process exists for resolving synchronization conflicts between the CRM system and the user's Outlook application.
Pre-Conditions	1. An interface to synchronize data from the CRM system to a user's Outlook application exists. 2. The data in the CRM system that will be synchronized to the user's Outlook application is intended to be synchronized.
Post-Conditions	1. Data from the CRM system has been synchronized to the user's Outlook application.
Normal Flow	1. User or automatic system process initiates an interface to synchronize data from the CRM system to a user's Outlook application. 2. Outlook application accepts updates from the interface.
Notes and Issues	If a user shares his personal contact with the CRM system, and another user changes that contact's information in the CRM system, is the user's personal contact information overwritten in Outlook? Can a user control what fields for a record are synchronized between the CRM system and Outlook? (For example, can a user choose to synchronize name and phone number, but not notes, for an Outlook contact)?
Requirements	FR OtherInterfaces004-001: The system shall provide an interface that allows the CRM system to synchronize data to a user's Outlook application. [Step 1] FR OtherInterfaces004-002: The system shall provide a way to resolve synchronization conflicts between the CRM system and the user's Outlook application. [Step 1] FR OtherInterfaces004-003: The system shall appropriately handle user deletion of shared personal items in Outlook that the user is not authorized to delete in the CRM system.
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces005
Use Case Name	Interface data from Outlook to CRM system
Use Case Description	To synchronize data that has been created or modified in a user's Outlook application to the CRM system.
Actor(s)	Outlook (interface), CRM system (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize data from the user's Outlook application to the CRM system is initiated by either a user action or an automatic system process.
Assumptions	1. An interface to synchronize data from the user's Outlook application to the CRM system can be initiated by either a user action or an automatic system process. 2. A process exists for resolving synchronization conflicts between the CRM system and the user's Outlook application.
Pre-Conditions	1. An interface to synchronize data from the user's Outlook application to the CRM system exists. 2. The data in the user's Outlook application that will be synchronized to the CRM system is intended to be synchronized.
Post-Conditions	1. Data from the user's Outlook application has been synchronized to the CRM system.
Normal Flow	1. User or automatic system process initiates an interface to synchronize data from the user's Outlook application to the CRM system. 2. CRM system accepts updates from the interface.
Notes and Issues	Can a user control what fields for a record are synchronized between the CRM system and Outlook? (For example, can a user choose to synchronize name and phone number, but not notes, for an Outlook contact)? If a user deletes a personal contact in Outlook after it has been shared with the CRM system, what happens to the contact in the CRM system? We do not allow contacts to be deleted in the CRM system; our expectation is that it will be deactivated instead (see FR OtherInterfaces004-003). This may apply to other objects as well.
Requirements	FR OtherInterfaces005-001: The system shall provide an interface that allows the user's Outlook application to synchronize data to the CRM system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	FR OtherInterfaces004-002: The system shall provide a way to resolve synchronization conflicts between the CRM system and the user's Outlook application. [Step 1]

Use Case ID	OtherInterfaces006
Use Case Name	Interface Siemens Installed Base Systems from external system to CRM system
Use Case Description	To synchronize Siemens Installed Base Systems and their associated data that have been created or modified in an external system to the CRM system.
Actor(s)	CRM System (interface), External System (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize Siemens Installed Base Systems and their associated data from an external system to the CRM system is initiated by an automatic process.
Assumptions	N/A
Pre-Conditions	1. An interface to synchronize Siemens Installed Base Systems and their associated data from an external system to the CRM system exists.
Post-Conditions	1. Siemens Installed Base Systems and their associated data have been synchronized from an external system to the CRM system.
Normal Flow	1. Automatic process initiates an interface to synchronize Siemens Installed Base Systems and their associated data from an external system to the CRM system. 2. CRM system accepts updates from the interface.
Notes and Issues	This interface will need to process a variety of exceptions, including but not limited to: 1. Handling installed base systems that are linked to Accounts which do not yet exist in the CRM system. 2. Deactivating, rather than deleting, Installed Base Systems that have been marked as no longer installed in the source system.
Requirements	FR OtherInterfaces006-001: The system shall provide an interface that synchronizes Siemens Installed Base Systems and their associated data from an external system to the CRM system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces007
Use Case Name	Interface Account data from external system to CRM system
Use Case Description	To synchronize Accounts and their associated data that have been created or modified in an external system to the CRM system.
Actor(s)	CRM System (interface), External System (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize Accounts and their associated data from an external system to the CRM system is initiated by an automatic process.
Assumptions	1. This UC may be executed to synchronize Account data from multiple external systems into the CRM system.
Pre-Conditions	1. An interface to synchronize Accounts and their associated data from an external system to the CRM system exists.
Post-Conditions	1. Accounts and their associated data have been synchronized from an external system to the CRM system.
Normal Flow	1. Automatic process initiates an interface to synchronize Accounts and their associated data from an external system to the CRM system. 2. CRM system accepts updates from the interface.
Notes and Issues	This UC might be executed for multiple external systems. In addition, it will be used to synchronize multiple types of Account-related data into the CRM system. This data includes, but is not limited to, Accounts, Account relationships, Account territory information, Account segmentation information, and so on. This interface will need to process a variety of exceptions, including but not limited to: 1. Deactivating, rather than deleting, Accounts that have been marked as no longer active in the source system.
Requirements	FR OtherInterfaces007-001: The system shall provide an interface that synchronizes Accounts and their associated data from an external system to the CRM system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces008
Use Case Name	Interface Account data from CRM system to external system
Use Case Description	To synchronize Accounts and their associated data that have been created or modified in the CRM system to an external system.
Actor(s)	CRM System (interface), External System (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize Accounts and their associated data from the CRM system to an external system is initiated by an automatic process.
Assumptions	1. This UC may be executed to synchronize Account data from the CRM system to multiple external systems.
Pre-Conditions	1. An interface to synchronize Accounts and their associated data from the CRM system to an external system exists.
Post-Conditions	1. Accounts and their associated data have been synchronized from the CRM system to an external system.
Normal Flow	1. Automatic process initiates an interface to synchronize Accounts and their associated data from the CRM system to an external system. 2. External system accepts updates from the interface.
Notes and Issues	This UC might be executed for multiple external systems. In addition, it will be used to synchronize multiple types of Account-related data into the external systems. This data includes, but is not limited to, Accounts, Account relationships, Account territory information, Account segmentation information, and so on.
Requirements	FR OtherInterfaces008-001: The system shall provide an interface that synchronizes Accounts and their associated data from the CRM system to an external system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces009
Use Case Name	Interface users and associated data from an external system to the CRM system
Use Case Description	To synchronize users and their associated data that have been created or modified in an external system to the CRM system.
Actor(s)	CRM System (interface), External System (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize users and their associated data from an external system to the CRM system is initiated by an automatic process.
Assumptions	N/A
Pre-Conditions	1. An interface to synchronize users and their associated data from an external system to the CRM system exists.
Post-Conditions	1. Users and their associated data have been synchronized from an external system to the CRM system.
Normal Flow	1. Automatic process initiates an interface to synchronize users and their associated data from an external system to the CRM system. 2. CRM system accepts updates from the interface.
Notes and Issues	This UC will be used to synchronize multiple types of user-related data into the CRM system. This data includes, but is not limited to, users, user access rights, user personas, and so on.
Requirements	FR OtherInterfaces009-001: The system shall provide an interface that synchronizes users and their associated data from an external system to the CRM system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces010
Use Case Name	Interface Leads from an external system to the CRM system
Use Case Description	To synchronize Leads and their associated data that have been created or modified in an external system to the CRM system.
Actor(s)	CRM System (interface), External System (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize Leads from an external system to the CRM system is initiated by an automatic process.
Assumptions	N/A
Pre-Conditions	1. An interface to synchronize Leads from an external system to the CRM system exists.
Post-Conditions	1. Leads and their associated data have been synchronized from an external system to the CRM system.
Normal Flow	1. Automatic process initiates an interface to synchronize Leads and their associated data from an external system to the CRM system. 2. CRM system accepts updates from the interface.
Notes and Issues	N/A
Requirements	FR OtherInterfaces010-001: The system shall provide an interface that synchronizes Leads and their associated data from an external system to the CRM system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces011
Use Case Name	Interface a defined set of data from the CRM system to the business warehouse
Use Case Description	To synchronize a defined set of data that has been created or modified in the CRM system to the business warehouse.
Actor(s)	CRM System (interface), Business Warehouse (interface)
Business Partner	No
Trigger(s)	1. An interface to synchronize a defined set of data from the CRM system to the business warehouse is initiated by an automatic process.
Assumptions	N/A
Pre-Conditions	1. An interface to synchronize a defined set of data from the CRM system to the business warehouse exists.
Post-Conditions	1. A defined set of data has been synchronized from the CRM system to the business warehouse.
Normal Flow	1. Automatic process initiates an interface to synchronize a defined set of data from the CRM system to the business warehouse. 2. Business warehouse accepts updates from the interface.
Notes and Issues	N/A
Requirements	FR OtherInterfaces011-001: The system shall provide an interface that synchronizes a defined set of data from the CRM system to the business warehouse. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces012
Use Case Name	Export data from a list in the CRM system to a user's local device
Use Case Description	To export data from a list in the CRM system to a user's local device.
Actor(s)	CRM System (interface), All Personas
Business Partner	Yes
Trigger(s)	1. A user initiates an export of data from a list view in the CRM system to the user's local device.
Assumptions	1. A user is only able to export data that s/he has access to. 2. This is a user interface export and the data that is exported shall reflect what is available in the user interface.
Pre-Conditions	1. An interface to export data from a list view in the CRM system to a user's local device exists.
Post-Conditions	1. Data has been exported from a list view in the CRM system to a user's local device.
Normal Flow	1. User initiates export of data from a list view to the user's local device. 2. System prompts user to define export criteria. 3. User defines export criteria, including which fields from the object to export. 4. System exports data to user's local device.
Notes and Issues	N/A
Requirements	FR OtherInterfaces012-001: The system shall allow a user to export data from a list view to the user's local device. [Step 1] FR OtherInterfaces012-002: The system shall allow a user to choose which fields associated to an object will be included in an export and in what order they will appear in the export from a list view. [Step 3] • For example, the user wants to export data from the Opportunity list view. He should be able to choose which fields from the Opportunity object (i.e. Opportunity details level) he wants to include in his export (that means, potentially more than displayed in the list view).
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces013
Use Case Name	Manually export data across objects from the CRM system
Use Case Description	To define and export a set of data across all objects, fields, and records in the CRM system. Administrators can choose to save the export parameters as a template for future use and are limited to exporting only those records that they have visibility to.
Actor(s)	SHARE Country Administrator, SHARE System Admin
Business Partner	No
Trigger(s)	1. An administrator initiates an export of data across objects from the CRM system.
Assumptions	N/A
Pre-Conditions	1. An interface to export data across objects from the CRM system exists. 2. The administrator has navigated to a location in the CRM system that allows the export of data across objects.
Post-Conditions	1. Data has been exported across objects from the CRM system.
Normal Flow	1. Admin initiates export of data across objects. 2. System prompts admin to define export criteria. 3. Admin defines export criteria, including: a. The types of object(s) to export b. The fields to include in the export c. The filter criteria for the records that will be exported d. The order in which the fields included in the export will appear in the export file 4. System accepts admin's export criteria and prompts admin to define additional export details. 5. Admin defines the following additional export criteria and confirms the export: a. The file format for the export file b. Whether to save the export template for future use 6. System accepts the admin's additional export criteria, processes the export, and exports the data to the user's local device.
Notes and Issues	A user should be able to define relationships between the objects that will be included in an export across objects. For example, a user who chooses to include both Opportunities and Accounts in an export should be able to specify that all Opportunities for Accounts in the state of Pennsylvania be included, or that all her Opportunities be included together with additional fields from their associated Account.
Requirements	FR OtherInterfaces013-001: The system shall allow a user to export data across objects from the CRM system. [Step 1] FR OtherInterfaces013-002: The system shall allow a user to define the types of objects to include in an export of data across objects. [Step 3]

	FR OtherInterfaces013-003: The system shall allow a user to define the fields to include in an export of data across objects. [Step 3] FR OtherInterfaces013-004: The system shall allow a user to define the filter criteria for the records that will be included in an export of data across objects. [Step 3] FR OtherInterfaces013-005: The system shall allow a user to define the order in which the fields to include in an export of data across objects appear. [Step 3] FR OtherInterfaces013-006: The system shall allow a user to choose the file format for an export of data across objects. [Step 5] FR OtherInterfaces013-007: The system shall allow a user to save the template for an export of data across objects for future use. [Step 5]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces014
Use Case Name	Automatically export data across objects from the CRM system
Use Case Description	To define and export a set of data across all objects, fields, and records in the CRM system. Users can choose to save the export parameters as a template for future use and are limited to exporting only those records that they have visibility to. Administrators can schedule the export to take place at a specific date and time, configure it to recur on a set basis, and/or choose to have the export delivered to a specified location (e.g. network drive, other application).
Actor(s)	CRM system (interface), SHARE Country Administrator, SHARE System Admin
Business Partner	No
Trigger(s)	1. An administrator determines that a recurring export of data across objects in the CRM system should be created.
Assumptions	The intention of this use cases is to provide data across objects from the CRM system to an external application/system.
Pre-Conditions	1. An interface to export data across objects from the CRM system exists. 2. Admin has navigated to a location in the CRM system that allows him/her to define export criteria.
Post-Conditions	1. New data export specification across objects from the CRM system has been defined and scheduled.
Normal Flow	1. Admin initiates new specification for export of data across objects. 2. System prompts admin to define export criteria. 3. Admin defines export criteria, including: a. The types of object(s) to export b. The fields to include in the export c. The filter criteria for the records that will be exported d. The order in which the fields included in the export will appear in the export file 4. System accepts admin's export criteria and prompts admin to define additional export details. 5. Admin defines the following additional export criteria: a. The file format for the export file b. Schedules the export to run at a set time c. Schedules the export to run on a recurring basis d. How the export file will be delivered 6. System accepts the admin's additional export criteria and saves the export specification
Notes and Issues	A user should be able to define relationships between the objects that will be included in an export across objects. For example, a user who chooses to include both Opportunities and Accounts in an export

	should be able to specify that all Opportunities for Accounts in the state of Pennsylvania be included, or that all her Opportunities be included together with additional fields from their associated Account.
Requirements	FR OtherInterfaces014-001: The system shall allow an admin to schedule an export of data across objects to occur at a specific time. [Step 5] FR OtherInterfaces014-002: The system shall allow an admin to schedule an export of data across objects to occur on a recurring basis. [Step 5] FR OtherInterfaces014-003: The system shall allow an admin to choose whether the results of an export of data across objects are delivered via a download file or via storage in a network location that the admin defines. [Step 5] FR OtherInterfaces014-004: The system shall allow an admin to cancel or modify a scheduled export. [Step 2]
Requirements from other Use Cases that apply to this Use Case	FR OtherInterfaces013-001: The system shall allow a user to export data across objects from the CRM system. [Step 1] FR OtherInterfaces013-002: The system shall allow a user to define the types of objects to include in an export of data across objects. [Step 3] FR OtherInterfaces013-003: The system shall allow a user to define the fields to include in an export of data across objects. [Step 3] FR OtherInterfaces013-004: The system shall allow a user to define the filter criteria for the records that will be included in an export of data across objects. [Step 3] FR OtherInterfaces013-005: The system shall allow a user to define the order in which the fields to include in an export of data across objects appear. [Step 3] FR OtherInterfaces013-006: The system shall allow a user to choose the file format for an export of data across objects. [Step 5] FR OtherInterfaces013-007: The system shall allow a user to save the template for an export of data across objects for future use. [Step 5]

Use Case ID	OtherInterfaces015
Use Case Name	Automatically create new Opportunities through an interface
Use Case Description	To automatically create new Opportunities through an interface. This interface can be executed by a process that is internal to the CRM system or by an external system. Scenarios where this UC is executed include: • Automatically generating Service Renewal Opportunities from expiring Service Contracts. • Automatically generating Equipment Opportunities from an external Lead management system.
Actor(s)	CRM system (interface), External System (interface)
Business Partner	No
Trigger(s)	1. An interface to create Opportunities in the CRM system is initiated by an automatic process.
Assumptions	N/A
Pre-Conditions	1. An interface to create Opportunities in the CRM system exists.
Post-Conditions	1. Opportunities have been created in the CRM system.
Normal Flow	1. Automatic process initiates an interface to create Opportunities in the CRM system. 2. CRM system accepts new Opportunity records from the interface.
Notes and Issues	
Requirements	FR OtherInterfaces015-001: The system shall provide an interface that creates Opportunities in the CRM system. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

Use Case ID	OtherInterfaces016
Use Case Name	Create, update, and delete data in the CRM system via a manually-configured data load
Use Case Description	To configure and execute a one-time data load or restatement in the CRM system from an external template file or script. This UC is only executed by system administrators, and is meant to provide functionality that is similar to EIM and SQL data loads / restatements in Siebel.
Actor(s)	CRM system (interface), System Administrator
Business Partner	No
Trigger(s)	1. A system administrator determines that a data load is necessary to create, update, and/or delete data in the CRM system.
Assumptions	N/A
Pre-Conditions	1. A data load process exists that can be configured manually and allows the creation, updating, and deletion of records in the CRM system.
Post-Conditions	1. Records in the CRM system have been created, updated, and/or deleted by a manually-configured data load.
Normal Flow	1. System administrator configures and initiates a data load to create, update, and/or delete data in the CRM system. 2. CRM system accepts new records, updates, and/or deletions from the data load.
Notes and Issues	This requirement is meant to describe the functionality that EIM and SQL statements provide in Siebel. Specifically, system administrators should be able to define and execute data restatement and data load jobs that manipulate, load, and delete records according to specified criteria on an as-needed basis. We understand that the language “while bypassing application-level business logic” (see FR OtherInterfaces016-001) may be difficult for OSC to support. This is critical to our data maintenance process, and we would like to explore a solution that accommodates it.
Requirements	FR OtherInterfaces016-001: The system shall allow a system administrator to configure and execute a data load that creates, updates, and/or deletes records in the CRM system while bypassing application-level business logic. [Step 1]
Requirements from other Use Cases that apply to this Use Case	N/A

4.12. Supplementary Requirements

Use Case ID	Supplementary Requirements
Use Case Name	Supplementary Requirements
Use Case Description	These requirements apply throughout the CRM system and are not tied to a specific Use Case. Please note: The supplementary requirements for the requested analytical functionality is documented separately (see use case family *"Analytics Supplementary Requirements"*).
Requirements	Supplementary001: The system shall allow a user to collapse/expand groups of secondary, related attributes throughout the CRM system on an as-needed basis. Potential examples include: • A user viewing the name for an Account may choose to expose additional name attributes for the Account. • A user viewing the address for an Account may choose to expose additional address attributes for the Account. • A user reviewing a record may choose to display or hide all attributes of a certain type (such as segmentation). • A user may choose to hide or show attributes on an entire view (such as show more / show less). • The system should not prevent the user from collapsing/expanding specific groups of fields. • A user should have access to a "collapse / expand all" function to collapse/expand all groups on a screen at the same time. Supplementary002: The system shall allow the attributes that a user can see throughout the system to be based on: • The user's role (an Equipment Account Executive in Germany sees different Opportunity attributes than a Service Account Executive in Denmark). • A record's context (an Equipment Opportunity displays different attributes than a Service Opportunity). • The user's country (a user in China wants to capture separate date/time values that correspond to the time specific Sales Stage values are selected, and only users in China should be able to see those values). Supplementary003: The system shall allow a picklist to be configured so that its selectable values are pre-filtered based on the value selected in a related attribute. • A user who selects a certain Product Line and Winning Vendor for a Solution can only select Winning Vendor Products from that Product Line and Vendor. • This includes dynamic pre-filtering (for example, filter available Competitor Installed Base Systems to only those for the Opportunity's Account).

	Supplementary004: The system shall allow a user to remove pre-filters that are applied to a list of available choices. • This applies throughout the CRM system, and includes examples such as: o Choosing a Project to associate to an Opportunity (choices may be pre-filtered by Account, by Project Status, etc.) o Choosing Install Base records to associate an Oppty o Choosing Contacts to associate to an Account o Etc. Supplementary005: The system shall provide for country-specific values in fields that are tied to global values, and are only displayed for the country they apply to. • China defines five additional Sales Stage values, and only users in China are able to select those values. • Each of the five additional Sales Stage values China defines is tied to a global Sales Stage value, and is treated identically to its global Sales Stage value by the CRM system. Supplementary006: The system shall provide a way for administrators to review and maintain data that they are not assigned to. Supplementary007: The system shall support a way for users to view and access data by ownership. • For records that utilize team-based visibility: A user can see records for which he or his direct reports are on the team. o Example #1: A user might be able to see his own Opportunities, all of his direct reports' Opportunities, all Opportunities in his country, all Opportunities across all countries, etc. • For records that do not utilize team-based visibility: Support a way for a user's ability to see and select records to be restricted to only those records he is responsible for via assignment. o Example #1: When choosing a product for an Opportunity, a user might only see and select any product that falls within a modality / product family / etc. that he is responsible for. o Example #2: When reviewing the Installed Base for an Account, a user might only see the Installed Base records that fall within a modality / product family / etc. that he is responsible for. Supplementary008: The system shall allow a user to hide, expose, and reorder the attributes that he is able to view. • This applies to all platforms/UIs except the smartphone UI and its related function-specific applications. • This applies to list views, not to form / detail views. Supplementary009: The system shall support different currencies for

	different countries. Supplementary010: The system shall allow a user to review objects and records that are related to his current focus in the CRM tool without leaving his current focus. • A user reviewing a Lead should be able to review existing Opportunities, Contacts, Install Base, etc. for the Lead's associated Account without leaving the Lead. Supplementary011: The system shall allow a user to perform a global search across all data that he has visibility to in the CRM system from anywhere in the CRM system. • A user can search for "Mercy Medical" from anywhere in the CRM system and review a list of all Accounts, Leads, Opportunities, Contacts, Activities, Install Base, etc. that match "Mercy Medical." • A user can specify additional filters in the global search (for example, search for Active Opportunities that match "Mercy Medical" and have a Close Date after January 1, 2015). Supplementary012: The system shall indicate exactly which fields need to be valued if a user attempts to save a record without all required information. • A user attempts to save an Opportunity without choosing an Account or Sale Type, and the system clearly displays / highlights these two fields and prompts the user to value them. • This should work consistently across all fields and screens in the system. Supplementary013: The system shall display a contextual tooltip that explains the use or purpose of a field. • It should be possible for an administrator to enable/disable tooltips for specific fields. Supplementary014: The system shall allow a user who has access to data in multiple countries to filter his visibility to an individual country or group of countries. • For example, if a user has access to records in Italy and Spain, he should be able to choose to only see records that belong to Italy. • When a user does this, the visibility filter should remain in place across all objects in the system (Accounts, Opportunities, Leads, etc.) until the user clears it. Supplementary015: The system shall allow a user to view, query, and edit data in a logical grouping of records (in-line editing, list views, etc.). Supplementary016: The system shall allow a user to possess multiple

	personas. Supplementary017: The system shall support country-specific translations for UI labels. Supplementary018: The system shall support country-specific translations for constrained field values. • A user in Germany sees a constrained list of values in German, while a user in the US sees the same list of values in English. Supplementary019: The system shall allow for a country or organization to be migrated into the CRM system from another CRM system. • Administrators must be able to migrate employees, visibilities, data, assignment rules, etc. into the CRM system. Supplementary020: The system shall allow mass quantities of data to be migrated into the CRM system. • Administrators must be able to migrate mass quantities of Accounts, Contacts, Solutions, Activities, Leads, Install Base, Products, etc. into the CRM system. Supplementary021: The system shall allow a user to retrieve information from an external tool from a location in the CRM system. • Users should be able to link from a record in the CRM system to detailed information about that record in an external tool (i.e., link from an Account in the CRM system directly to revenue details for that Account in an external tool, or link directly to information about a specific Competitor Product). • Users should be able to launch external tools from the CRM system without record-specific context. Supplementary022: The system shall support UTC character sets. • This includes supporting pictorial characters (such as Japanese and Chinese character sets) as well as accent characters (such as the German umlaut or the French accent grave). Supplementary023: The system shall allow a user to review and navigate to any other records that are linked to a given record, from that record. • For example, if an Opportunity is linked to a Contact a user should be able to see and navigate to the Contact from the Opportunity, and see and navigate to the Opportunity from the Contact. • This applies for all relationships between records in the CRM system. Supplementary024: The system shall automatically notify users of, and delete, Projects that have no Opportunities associated to them.

	• This notification should not be an email. • Users should still be able to manually delete Projects. Supplementary025: The system shall support an interface that allows the CPQ system to initiate a load of records and fields from the CRM system into the CPQ system. • This includes Accounts, Opportunities, Competitor Installed Base Systems, Users, access rights, user visibilities, and so on. Supplementary026: The system shall allow a user's data ownership and visibility to be delegated and/or transferred to another user. • For example, a user who goes on vacation may have his data ownership and visibility temporarily transferred to a team member to make sure his Opportunities, Activities, etc. are managed while he is out of the office. • The system should allow an administrator to temporarily or permanently transfer a user's data ownership and visibility to another team member (for example, if the user is out sick for an extended period of time or leaves the company). • This is similar to the ability to assign additional people to, or transfer ownership of, a user's position in Siebel. Supplementary027: The system shall display news / updates for a user upon login. • The user shall be able to decide what kind of news / updates s/he will receive. Supplementary028: The system shall allow a user to flag records for later follow-up. • For example, a user shall be able to flag his most important Account(s) as favorite(s) • A user data mined his installed base data and has found four installed base systems with potential for replacement. The system shall allow him to flag those systems for later follow-up. Supplementary029: The system shall allow a user to add/remove people from a team. Supplementary030: The system shall be able to integrate reports which are executed in a different environment. • The user shall have access to analytical functionality (reports) which are not implemented and executed in the SHARE cloud. A typical use for this is reports based on order income and/or revenue data. These reports will be most likely executed in the SAP BW • The system shall provide access to these "external reports" in a transparent way to the user. • It shall be possible to integrate these "external reports" in several operational workflows

	• The system shall provide the ability to access an "external report" for a specific set of data (e.g. 360 customer view of a single account, or rolling 12 months revenues for the currently active account)
	
	Supplementary031: It shall be possible to access a single object in the system (lead, project, opportunity, revenue line item, account, contact) via a URL from an external application (e.g. an "external report" as described above).
	
	Supplementary032: The system shall allow an administrator to configure a business partner's access and visibility to be either the same as an internal employee, or to be restricted in the following ways:
	• For records that utilize team-based visibility (Accounts, Opportunities, Appointments, etc.), a business partner can only see records that s/he is explicitly assigned to.
	    o For example, a business partner might be able to see an Account because she is on the Account team, but can only see child records under the Account (Contacts, Opportunities, Appointments, Installed Base, etc.) that she has been explicitly assigned to by a Siemens employee. An internal employee would be able to see (but not necessarily edit) all child records under the Account regardless of whether he was part of their team.
	• For records that do not utilize team-based visibility (such as Products), a business partner can only see records that are part of his/her assignment skillset.
	    o For example, a business partner responsible for the GZs MR, CT, and US can only see products belonging to those GZs.
	• For child entities that do not utilize team-based visibility (such as Attachments, Notes, etc.), a business partner can only see records that are marked as visible to business partners, and can only edit records that are marked as editable by business partners. (See Supplementary039 and Supplementary 040 for additional information.)
	• A business partner can create child records from any record that s/he has visibility to.
	    o For example, a business partner can create Opportunities for any Account that she has visibility to.
	• A business partner can modify only records that s/he owns.
	    o For example, a business partner can edit an Opportunity if she is the owner (the primary on the Opportunity team). If she is merely on the team but is not the owner, she can see but not modify the Opportunity.
	
	Supplementary033: The system shall allow a user to review an Account's power map.
	• The power map is a chart showing all contacts in an Account, their areas of influence, the strength of their influence, and their opinion of Siemens.

	Supplementary034: The system shall display a flat view of Contact-Account relationships. • This is a view that shows a single record for every unique combination of Contact + Account. • If a Contact is associated to five Accounts, it will have five records in this view. Supplementary035: The system shall allow an internal employee to choose whether child entities that do not utilize team-based visibility (such as Attachments, Notes, etc.) are visible to external business partners. Supplementary036: The system shall allow an internal employee to choose whether child entities that do not utilize team-based visibility (such as Attachments, Notes, etc.) can be maintained by external business partners. Supplementary037: The system shall allow a user to generate an external email from any record he has visibility to in the CRM system. Supplementary038: The system shall support precision and accuracy in all calculated, rounded, or converted numbers / financial data that complies with Siemens Healthcare's standards.
Notes and Issues	N/A

4.13. System Administration Requirements

Use Case ID	System Administration Requirements
Use Case Name	System Administration Requirements
Use Case Description	These system administration requirements apply throughout the CRM system and are not tied to a specific Use Case. This document does not include functionality-specific administration requirements which are tied to other Use Cases. It is possible for many of these requirements to be satisfied by functionality that is available to a developer in the CRM system's development tools – they do not necessarily need to be available as a function within the CRM system itself. This is something that should be further discussed and defined during functional design discussions. As with all of our requirements, we expect our implementation partner to help us understand how we can best realize them.
Requirements	SystemAdmin001: The system shall allow an administrator to maintain Competitor and Competitor Product data. SystemAdmin002: The system shall allow an administrator to maintain territory assignment rules. SystemAdmin003: The system shall allow an administrator to maintain system users. • This includes the maintenance of a user's persona(s), responsibilities (what the user can and cannot see/do in the system), access rights to and within the CRM system, and territory information (which may come from an external source). • This may include user-specific access restrictions or exceptions. For example, a country administrator might be able to maintain assignment rules but with a restriction that only permits him to do so for his country. SystemAdmin004: The system shall allow an administrator to maintain system personas. • This includes the maintenance of the screens a persona can see and the persona's access to functionality / actions within the CRM system. • This may include user-specific access restrictions or exceptions. For example, a country administrator might be able to maintain assignment rules but with a restriction that only permits him to do so for his country. SystemAdmin005: The system shall allow an administrator to maintain List of Value fields. • This includes creating, editing, and activating/deactivating the values that an LOV contains, and also maintaining the order in which those values appear. • If an administrator deactivates an LOV value, it should no longer be selectable but should persist for records where it has al-

	ready been selected. SystemAdmin006: The system shall allow an administrator to maintain the pre-defined queries for screens, users, and personas. • For screens, this includes creating and maintaining the base list of PDQs that are available on a screen and defining the global default PDQ for a screen. • For users and personas, this includes creating and maintaining the default list of PDQs for a user or persona. • This also includes specifying the sort within a PDQ (e.g. filter for Active Opptys and always sort by close date in ascending order), and defining the *order* (not *sort*) in which available PDQs appear. • Global PDQ defaults should be overridden by persona PDQ defaults, and persona PDQ defaults should be overridden by user PDQ defaults. • A user should be able to override the default PDQ that an admin sets up for him. SystemAdmin007: The system shall allow an administrator to enable, disable, and review auditing for specific attributes. SystemAdmin008: The system shall allow an administrator to maintain currencies and their associated exchange rates. SystemAdmin009: The system shall allow an administrator to override specific field value restrictions. • For example, an administrator can change an Opportunity's Status from "Lost" back to "Active," but a standard user cannot. SystemAdmin010: The system shall allow an administrator to maintain field and UI label translations. • When necessary, an administrator should be able to override the default language translations for out-of-the-box field and UI element labels. • An administrator should also be able to define and maintain language translations for custom field and UI element labels. • An administrator should be able to define and maintain language translations for constrained field values (for example, LOVs). SystemAdmin011: The system shall allow an administrator to maintain the templates for documents that a user can generate within the system. • For example, a user may be able to use a base template to generate a briefing document for an Opportunity or a business plan for an Account while in the CRM system. An administrator should be able to create, edit, and maintain these base templates. SystemAdmin012: The system shall allow an administrator to move records from one parent record to another in the CRM system. • For example, an administrator should be able to move an Opportunity from one Account to another in the CRM system.

	SystemAdmin013: The system shall allow an administrator to review overall system performance. • For example, an administrator should have access to a dashboard or report that displays the ping/query/etc. times for the different components in the server to answer questions such as: Are logins taking unusually long this afternoon? Did last night's patch introduce a performance problem within the Opportunity module? • This also includes reviewing uptime, performance, and utilization for the different server components. SystemAdmin014: The system shall allow an administrator to maintain the mappings that are used when data is copied in the CRM system. • For example, an administrator should be able to specify which fields on an Opportunity are actually copied when an Opportunity is copied. (i.e., copy the Opportunity's Account but not its name.) SystemAdmin015: The system shall allow an administrator to specify which restrictions apply to field state changes, and which users/personas are exempt from these restrictions. • For example, all users should be able to change an Opportunity's Status from Active to Won, but only system administrators and/or specific individuals should be able to change an Opportunity's Status from Won to Active. SystemAdmin016: The system shall allow an administrator to maintain the list of screens that are available in the CRM system. • For example, a global administrator and/or developer might enable or disable specific screens/modules in the CRM system based on whether the company wishes to use them. • This is similar to the Administration-Views function in Siebel. SystemAdmin017: The system shall allow an administrator to maintain the communication templates that the CRM system uses. • For example, an administrator should be able to define the field layout for certain types of tasks. If a user is submitting an Account Creation Task, he should see one set of fields; if he is submitting a Quote Creation Task, he should see another set of fields. • An admin should also be able to define and maintain any external communication (i.e., email) templates that the system uses. SystemAdmin018: The system shall allow an administrator to enable, disable, and maintain system announcements in the CRM system. • This is similar to the scrolling message function in Siebel – an admin should be able to set up global or country/region-specific broadcast messages. SystemAdmin019: The system shall allow an administrator to maintain country-specific settings in the CRM system. • This is similar to the Organization Attributes setting in Siebel.

	SystemAdmin020: The system shall allow an administrator to review and maintain the status of external interfaces. • This includes seeing the status of an interface (has it generated any error messages), manually initiating an automatic interface (if it failed, attempt to re-run it), and maintaining interface field mappings (how does Account Name in SAP map to a field in the CRM system?). SystemAdmin021: The system shall allow an administrator to maintain, schedule, and execute repeating jobs / automatic processes. • This includes manually executing a process that is otherwise scheduled to run automatically. SystemAdmin022: The system shall allow an administrator to review and maintain user sessions. • This includes reviewing the logs for a specific session, and also manually terminating a user's session when necessary. SystemAdmin023: The system shall allow an administrator to maintain hyperlinks to external resources. • An administrator should be able to create, edit, and remove the various hyperlinks to external systems, reports, documents, etc. within the CRM system. SystemAdmin024: The system shall allow an administrator to maintain the help messages that are available to users in the CRM system. • This includes creating, editing, and maintaining the mouse over help text that appears for individual fields. • This also includes creating, editing, and maintaining any pop-up help text in the CRM system. SystemAdmin025: The system shall allow an administrator to maintain country, regional, global and Business Area/Business Line specific List of Values or combinations thereof across all standard and custom objects • E.g. maintaining Opportunity Sales Programs for a Business Line in a country
Notes and Issues	N/A

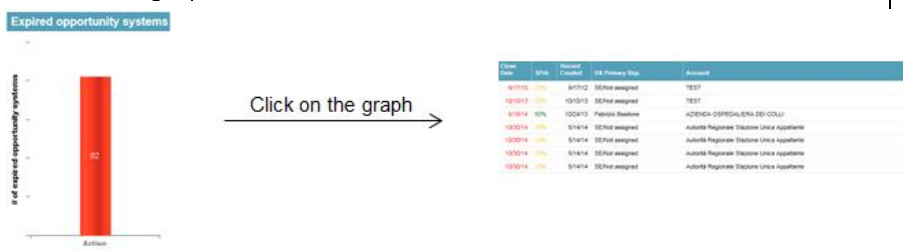
4.14. Non-functional Requirements

Use Case ID	Non-functional Requirements
Use Case Name	Non-functional Requirements
Use Case Description	These requirements apply for the CRM system and are not tied to a specific Use Case.
Requirements	nonFunc001: **User Authentication** - The CRM Solution shall be connected to the Siemens Healthcare GmbH entitlement system to provide an efficient and secure identification, authentication and authorization for internal users as well as for external business partners. - This includes supporting Siemens Healthcare GmbH's Single Sign On process, separating Business Partners from internal employees, integration with GAMA for CRM system access requests, etc. - The CRM system shall allow for an authentication method which is adequate for the data which is accessed. Depending on the final classification and InfoSec needs also a strong authentication mechanism for internal and external users shall be possible. - In the case of an outage of the Siemens Healthcare GmbH Entitlement System, there needs to be an immediate (temporary) alternative way to authenticate a user (including external business partners), which is still compliant with ISEC regulations, in order to continue system usage. nonFunc002: **Availability** The requested CRM system shall be seen as a business critical application and therefore a high availability is requested. For detailed availability requirements, please refer to the contract with Oracle and the underlying Oracle policy (Chapter 4: Oracle Cloud Service Level Objective Policy). http://www.oracle.com/us/corporate/contracts/cloud-ent-hosting-del-policies-1881438.pdf nonFunc003: **Performance/Response Time** The CRM system shall implement ISO9126 standard rules: - Response time for a transactional task (e.g. drill down into an object, switch screens) <1 seconds in 90% of cases. - Response time for an analytical action (e.g. queries, dashboards, reports) <3 seconds in 90% of cases. nonFunc004: **Capacity** The CRM system needs to be able to scale with the number of users, organizational hierarchy (regions), and concurrent access, especially for data base size and system performance. nonFunc005: **Failover and Recovery** The CRM system is seen as a business critical application. Accordingly adequate failover and recovery mechanism shall be in place. For detailed requirements, please refer to the contract with Oracle and the underlying Oracle policy (Chapter 3: Oracle Cloud Disaster Recovery Service Policy). http://www.oracle.com/us/corporate/contracts/cloud-

	ent-hosting-del-policies-1881438.pdf. nonFunc006: **Backup and Recovery** The CRM system is seen as a business critical application. Accordingly adequate backup and recovery mechanism shall be in place. For detailed requirements, please refer to the contract with Oracle and the underlying Oracle policy (Chapter 2: Oracle Cloud System Resiliency Policy, and 3: Oracle Cloud Disaster Recovery Service Policy). http://www.oracle.com/us/corporate/contracts/cloud-ent-hosting-del-policies-1881438.pdf. nonFunc007: **Access Security Requirements** The CRM system must comply with the Siemens Healthcare GmbH HC ISEC requirements regarding Integrity, Privacy, Audit Requirements, and Access Methods. nonFunc008: **Monitoring Access** The CRM system needs to be able to track last login and accessed/modified records for any login in line with Siemens Healthcare GmbH's data protection regulations. nonFunc009: **Data Retention** The system needs to provide standardized support for archiving data on a regular base, ensuring that easy access is still possible in case of audits or for data alignment and verification if needed. nonFunc010: **IT-System Delivery** The system shall be accessible from laptops, smartphones, and tablets. In addition, the system must run on all major operating systems and browsers, like: Operating Systems: - Microsoft Windows 7 - Microsoft Windows 8.x - Microsoft Windows 10 and higher - iOS9 and higher - Android Browsers: - Microsoft Edge - Microsoft Internet Explorer - Mozilla Firefox - Google Chrome - Apple Safari nonFunc011: **IT Security Requirements** The system must integrate into and comply with all Siemens Healthcare GmbH IT security standards. nonFunc012: **User** - The CRM system shall set up personalized accounts for external and internal users. - The user id of the user account shall be based on the GID.

	- The CRM system shall allow setting user account inactive without the deletion of the respective user account. - The CRM system shall be able to synchronize and merge users, specific parameters and profile data with / from other systems (like GAMA). nonFunc013: **User Roles/Personas** - The CRM system shall be able to create, maintain & manage user group & individual user profiles. - The CRM system shall be able to synch and merge these specific attributes with / from other systems like CRM backbone or GAMA nonFunc014: **Inactive Users** - The CRM system shall allow the de-activation and re-activation of a user account. - The CRM system shall deny inactive user getting access to any area of the solution. - Data references shall remain. nonFunc015: **Interfaces** - The CRM system shall be connected to other HC IT Systems via industrial standard interfaces.
Notes and Issues	N/A

4.15. Analytics Supplementary Requirements

Use Case ID	Analytics Supplementary Requirements
Use Case Name	Analytics Supplementary Requirements
Use Case Description	These requirements apply throughout the analytical functionality of the CRM system and are not tied to a specific Use Case.
Requirements	AnalyticsSupplementary001: The system shall provide Analytics capabilities to allow the user to only report on data that is relevant to them and which they are allowed to see, e.g. can only analyze data related to their defined territory. Territories shall be defined in geographical terms, and/or specific accounts and/or specific BU's and/or specific products. AnalyticsSupplementary002: The system shall allow an administrator to access all necessary visibility data (Accounts, BUs, Products) on a single user basis to be used to manage data restriction in an external application. AnalyticsSupplementary003: The system shall provide Analytics capabilities to allow Sales Managers to only see data in reports related to their "sales team" as defined in the operational CRM system. AnalyticsSupplementary004: The system shall provide Analytics capabilities to allow the user to export to pdf and/or MS Excel for any reports (graphs and/or tables) displayed at any time. AnalyticsSupplementary005: The system shall provide Analytics capabilities to allow the user to generate detailed data tables (list views) by clicking on a relevant area of a graph or KPI.  AnalyticsSupplementary006-001: The system shall provide Analytics capabilities to consolidate selected KPI's (e.g. data quality index, win/loss performance index) on a "one glance "dashboard. AnalyticsSupplementary006-002: The system shall provide Analytics capabilities to allow the user to execute the detailed reports by clicking on the corresponding KPI"s on a "one glance" dashboard. AnalyticsSupplementary007: The complete workflow with the steps described below is of high importance and needs to be implemented in the most effective and intuitive way!

	1. Display of reports **2. Creation of detailed data table** **3. Selection of the object(s) to be modified** **4. Necessary modification of data** **5. Display of report with updated values**
Notes and Issues	N/A

5. Glossary

Term	Definition
Abandoned	"Abandoned" represents an Opportunity Status as well as a Lead Status in the CRM System. The Opportunity Status is set to "Abandoned" in several cases. The primary case is when the customer is discarding the project, i.e. neither Siemens Healthcare nor any competitor will be awarded and the system(s) will not get part of the market. Other cases are if Opportunities have been entered by error or as a duplicate. The Lead Status is set to "Abandoned" if poor data quality doesn't allow to properly qualify the lead or if Lead qualification has revealed that no business potential exist, neither in the short-, medium-, or long-term.
Account	An Account represents a legal entity or a department within a legal entity, with which Siemens Healthcare is currently doing business with or is planning to do business with in the future. On a transactional level an Account can take different roles (Sold-To, Ship-To, End-User, etc.). An Account is linked to all other objects, like Contacts, Activities, Opportunities, Projects, Installed Base.
Account Business Plan	An Account Business Plan is a strategic document that leads to a deeper understanding of a customer, including its key players and decision makers, its business situation, goals, obstacles, etc.. It usually also comprises an executable plan for maximizing account revenue. An Account Business Plan contains a lot of operational CRM data (e.g. Accounts, Contacts, Opportunities, Leads, Installed Base, and Activities). In addition, it also comprises information that is not available in the CRM System, like industry insights, customer strategy, success stories, etc. This kind of information is either entered manually into the Account Business Plan or is interfaced from another tool. The account plan is a living document that should be reviewed and updated regularly.
Account's legal / ownership relationships	A legal / ownership relationship is a direct relationship between two Accounts that are legally associated with / owned by each other. For example, establishing a legal / ownership hierarchy between all Accounts that belong to Main Line Health.
Activity	An Activity is created and/or updated by a User in order to document any kind of customer interaction or internal tasks, i.e. it is either a time bound calendar event,

	such as meetings, customer site visits, appointments, etc., or a status bound task, such as create a quote for Sales Rep, send email to customer, etc.
Appointment	An Appointment is a type of Activity in Activity Management. It represents any kind of customer interaction (e.g. meeting, call, site visit, etc.) that occurs at a specific time with a defined start time, an end time, and duration. Appointments are displayed in the user's calendar (in the CRM system and the user's MS Outlook application).
Assignment	Assignment describes the process by which a user is granted access to an item in the CRM system. For example, a user who is assigned to an Opportunity has access to that Opportunity.
Association	Association describes the process by which a link is established between two or more items in the CRM system. For example, a Contact might be associated to an Account if it represents a physician who works at the Account.
Authorized	A user is "Authorized" if s/he has the rights to see and/or create and/or edit data in the CRM System.
Booked	"Booked" represents an Opportunity Status in the CRM System. An Opportunity gets the status "Booked", when we have won the project (customer awarded Siemens Healthcare), the order has been transferred to the ERP system and the order was successfully booked in the ERP system. The status "Booked" will be set automatically by the ERP Interface.
Business Partner	Business Partners are commercial entities acting in the sales process between Siemens and the end customer. The Business Partners in our indirect channels can be grouped into two categories – agents and distributors. They act in the same way as our internal sales staff, but their access to the CRM system needs to be limited according to their scope as agreed with Siemens HC.
Business Warehouse	The Business Warehouse is the main data repository of Siemens Healthcare containing data from the key business processes (CRM, SCM, PLM, Finance, etc.) that is used for any kind of global standard reporting. From a CRM perspective we share information from the CRM System with the business warehouse, but also need data from the business warehouse in the CRM system to support the sales process efficiently.
Close Date	As long as the Opportunity is in the status "active", the Close Date represents the date, by when the Order is expected. As soon as the status of the Opportunity is changed to "booked" or "lost", the Close Date is automatically updated and represents the actual order entry date.

	Note: This field's purpose has changed from SHARE to SHARE Cloud, and we will investigate renaming it during our field-level analysis for SHARE Cloud.
Competitor Installed Base	The Competitor Installed Base is an overview of all Competitor Systems installed at an Account or across Accounts. A Competitor Installed Base record is automatically created when setting an Opportunity to ‘Lost’ or can be created independently.
Configuration	A Configuration is generated in the CPQ System. It represents the product and/or service that Siemens Healthcare will offer to the customer. For the purposes of this document, the Configuration is WHAT we are selling, but it should be considered separately from the price that we will offer.
Contact	A Contact describes an individual who is related to at least one Account. For example, the Head of Radiology of a hospital. A contact may also be a person from a third party who is involved in a business transaction, such as a hospital's external supply chain management consultant.
Conversation Owner	A Conversation Owner is a CRM user that has initiated a Team Conversation. The Conversation Owner is authorized to administer settings and participants for an existing team conversation.
Conversation Participant	A Conversation Participant is a CRM or non-CRM system user who participates in an existing Team Conversation, i.e. s/he is able to review and share conversation updates, but is not able to administer a conversation’s participants list / settings.
CPQ System	CPQ stands for Configuration-Pricing-Quoting is a separate application that will be seamlessly integrated in the CRM system. In the CPQ System one or several Opportunities of a Project is/are configured, its/their price is calculated and the quote is finally generated. Last but not least the order process is triggered from the CPQ system.
CPQ User	A CPQ user is an employee of Siemens Healthcare or a Business Partner that has an active user account in the CPQ System.
CRM System	The term CRM System stands for the CRM application used at Siemens Healthcare.

Decision Date	The Decision Date represents the date when the customer makes his decision to either award us with the project (= Opportunity Status "signed") or abandons the project (= Opportunity Status "abandoned"); the Decision Date will be automatically valued by the CRM System once the System Status is set from "Active" to "Signed" or "Abandoned". **Note**: This field's purpose has changed from SHARE to SHARE Cloud, and we will investigate renaming it during our field-level analysis for SHARE Cloud.
ERP System	For Siemens Healthcare an ERP System (ERP stands for *E*nterprise *R*esource *P*lanning) can be defined as the system that allows processing and managing orders, financials and logistics. The interface from CRM System to ERP System is one of the most important interfaces as it allows transfer/exchange project and ordering information.
External system	An external system can be any kind of application within the Siemens Healthcare IT landscape or authorized non-Siemens Healthcare applications that will communicate and exchange data with our CRM System.
GAMA	GAMA is Siemens Healthcare's Global Access Management Architecture system. It is the source system for user data.
Inheritance	Inheritance describes the process by which fields or field values are transferred from a parent record to an assigned child record.
Installed Base	The Installed Base is an overview of all systems (from Siemens and Competition) installed at an Account or across Accounts. The Installed Base is very important to Sales in order to understand the customer and to identify future sales potential (e.g. for equipment replacement, options and upgrades as well as service offerings).
Installed Base Manager	An Installed Base Manager is in charge of managing the Siemens Installed Base data. The data is maintained outside of the CRM system, in the local ERP system
Interface	The term Interface describes an established data exchange or connection between two systems or between two parts of the same system. For example, an interface exists between the CRM and C-P-Q systems to allow them to exchange Solution and Project data.
Lead	A Lead is a non-binding information or suggestion that there could be a potential for business with a specific Account and/or Contact. Lead details contain a combination of the following information: customer (Account), person (Contact), and business Opportunity

	(potential).
Lost	"Lost" represents an Opportunity Status in the CRM System which is to be set if the customer made the decision to award not Siemens, but a competitor for the deal.
Network relationships	A network relationship is a non-legal / non-ownership relationship between an Account and a network. An Account can have relationships with many networks, and a network can have relationships with many Accounts. A Group Purchasing Organization (GPO) is an example of a network, and a GPO's relationship with an individual member Account is an example of a network relationship.
Non-CRM system user	A Non-CRM system user is an employee of Siemens Healthcare or a Business Partner who does not have an active user account in the CRM System, but is actively contributing to activities, actions or events in the CRM and sales process.
Non-legal Account-to-Account relationships	A non-legal Account-to-Account relationship is a non-legal relationship between two Accounts. An Account can have multiple non-legal Account-to-Account relationships; that is, this type of relationship is many-to-many. For example, a lab that is owned by Hospital A but operated by External Vendor B has a non-legal Account-to-Account relationship to External Vendor B.
Notification	A Notification is a message or alert that is forwarded from one User to another User either within the CRM system (internal notification) or from the CRM system to an external communication tool (external notification).
Opportunity	An Opportunity represents a potential sale to a new or established customer (i.e. Account) that needs to be tracked through the sales process to completion. Unlike a Lead, an Opportunity is a confirmed business potential (qualified Lead), i.e. the customer has entered into his/her buying cycle, and i.e. s/he has a need, a budget and a concrete timeline for the purchase. In the CRM system, Opportunities can be grouped together in a Project. An Opportunity can only be assigned to one Project at a time. An Opportunity is finally closed as won, lost or abandoned. Tracking opportunities through the sales process is very important and a prerequisite for proper sales funnel management and in order to measure, manage and improve market transparency.

Opportunity Product	An Opportunity Product (in OSC it's called Revenue Line Item) is a representation, at the Opportunity level, of an item that will be configured (e.g. a system or service) for sale in the CPQ system.
OSC	OSC stands for “Oracle Sales Cloud”
Outlook	Microsoft Outlook is an e-mail client to access Microsoft Exchange, the e-mail server that is used by Siemens Healthcare. Microsoft Outlook offers the functionality to manage calendar entries, contacts and tasks. A seamless integration of Microsoft Outlook in our CRM Landscape is key to allow users to synchronize data between their Outlook application and the CRM System.
Postponed	"Postponed" represents a Lead Status in the CRM System. Postponing a Lead means that there is a business potential, but not in a specified timeframe (e.g. in the next 24 months).
Product	A Product is a representation of an item that can be configured for sale in the CPQ system. Products are stored in their own table, and can be associated to an Opportunity as an Opportunity Product.
Product Data Source	The Product Master Source feeds the CRM System and the CPQ System with Product Master Data in a systematic and structured way. For the CRM System, Product Master Data is relevant for the list of available Opportunity Products.
Project	In the CRM system, a Project is a container to be used to group opportunities together (one to many relationship). This allows a sales person to easily find and manage Opportunities that somehow belong together (e.g. Opportunities from the same tender).
Promoted	"Promoted" represents a Lead Status in the CRM System. Promoting a Lead means that the user converts the Lead to an Opportunity based on a proper assessment of the Lead's business potential with a positive result, i.e. the customer has a need, an approved budget and a concrete timeline.
Purge	Purging a group of imported Leads means deleting them from the system to “undo” an import, but keeping the main parameters of the import job (like mapping table, import format, etc.). Purging will not delete Leads that have already been promoted. Leads that will be purged must have been imported together in a single import job.
Quote	The Quote is a data container of one or multiple Configurations along with their Prices and any relevant terms and conditions being offered to the customer. After all relevant approvals have been obtained; the

	Quote is being transferred into the Proposal, the official offer document that is handed-over to the customer.
Siemens Installed Base	The Siemens Installed Base is a summary of all Siemens Systems installed at an Account or across Accounts. Next to the system specific information, the Siemens Installed Base also contains service contract information. A Siemens Installed Base record can exist independently from or be linked to an Opportunity. The Siemens Installed Base is maintained by Customer Services in the local ERP systems and "linked/interfaced" to the CRM system via the Global SAP Business Warehouse.
Signed	"Signed" represents an Opportunity Status in the CRM System which is to be set when the customer has signed our proposal, i.e. Siemens Healthcare has been awarded the deal.
Task	A Task is a type of Activity in Activity Management. It represents a status bound logical unit of work the CRM user must accomplish. A user can create a Task for him/herself or can assign a task to another CRM user.
Team Conversation	A Team Conversation is an online discussion within the CRM system that can be associated with other CRM objects (e.g. Accounts, Opportunities, Leads, etc.). Team conversations can be used to facilitate the collaboration and sharing of information within sales teams. A team conversation has one Conversation Owner and can have several Conversation Participants.
User	The User of the CRM system is either an internal employee or external Business Partner that was given access to the CRM System based on user request. A User is set-up in the CRM System with a dedicated role and authorized to access, see, create and modify items in the relevant modules.
GPO	GPO stands for Group Purchasing Organization.

6. Revision History

Version	Author	Content Changed	Change Date
1.0	Ron Fresta Diane Gaetano	Final document published.	2015.11.04