Business problem:

We only have the most recent contact/transaction details in Hubspot; can't see how loyal they are or other holidays they've taken.

Objective:

Import all historical bookings and quotes into Hubspot so they can be used for customer segmentation and help sales improve conversion rates

Benefits:

* Holding historical transactions in Hubspot will enable customers to be segmented by previous transactions and will also allow sales teams to see previous quote and booking history
* Providing sales with additional data will enable them to better convert sales opportunities and provide a better customer journey
* Improve conversion rates by matching offers to customer’s preferences

The following list of requirements must be met in order to successfully implement the CRM Phase III project. Requirements will be prioritized according to the following scale:

**Priority assignment –**

**Must Have (M)** – a critical requirement without which the product is not acceptable to the stakeholders

**Should Have (S)** – a necessary but deferrable requirement without which makes the product less usable but still functional

**Nice to Have (N)** – a nice feature to have if there are resources but the product functions well without it

REQUIREMENTS:

1. All historical quotes and booking from res systems Neptune and Triton shall be provided to Hubspot, as a one-time import. (Caveat – will be all bookings and quotes made since 1st Jan 2010, dependent on HubSpot capacity). **(M)**
2. Data should be loaded via the Deals API but linked to the Contacts database within Hubspot, so it is available to both Sales and Marketing portals (used for segmentation by Marketing). **(M)**
3. Solution team shall provide updated documentation of the feed so that business has reference materials to work with for future needs. Feed documentation may include items such as: **(M)**
   1. Field mappings (Triton/Boxi/Hubspot/Feed parameters)
   2. Diagrams
   3. Timings
   4. Specifications

Fields to be imported from res systems (Neptune & Triton):

Document: **Objective 9 Historical Deals API fields 20170810.xlsx (M)**

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