Objective 1 - Customer data within Neptune currently held at household level. Work to be done at Epicor to develop contact level data

Business problem:

In Neptune, a new contact is recorded at address level, where contact details are the same (telephone/address) but can have many people associated. A mail ID is assigned to the household record and several people can share the same mail ID – perhaps up to 20 individuals. Alternately, one person can have multiple mail IDs. A single booking can have many customers; some will have the same mail ID and some won’t. There is no way to easily separate out communications (e.g. party leader receives brochures and e-news may go to a family member directly).

Additionally, we need a better way to allocate the booking to the correct contact. The DW is using incorrect data. The mail/family number is unique, but isn’t reflected outside Neptune in MI. This field is also editable on the Neptune booking screen.

Objectives:

1. Add a contact URN (unique reference number) for all contacts on Neptune
2. Record additional contact level details within Neptune.
3. Provide search capabilities for new contact level data
4. Record client type at contact level instead of address level
5. Change logic so communication preferences default out of receiving communications automatically
6. Allocate the booking to the correct person who actually makes the booking
   1. Provide lead passenger flag/tick box to determine who is the lead passenger on a booking, i.e. the person to receive all communications regarding the booking
   2. De-dupe rules to be built into Neptune to determine whether or not a new contact should be created.

Benefits:

* Providing an individual contact URN will make it much easier to dedupe and provide contact level information.
* Will have the ability to identify the correct customer for the transaction (booking, quote, e-news or brochure request) and import history under the correct contact. Accurate customer booking history will be necessary to deliver a loyalty scheme for Le Boat, a future business objective.
* Will be able to address communications to the appropriate individual, instead of using an extract to derive the correct contact.

Out of scope:

* Fixing how Neptune works for special character – to search; is creating duplicate profiles because is Neptune doesn’t recognize special characters. It transfers it to a question mark (?) character

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

**REQUIIREMENTS:**

To determine whether a new client must be created, a “Lead Passenger” flag/tick box will be added to the new client profile.

To determine whether a new client should be created for de-duping purposes, the following logic has been supplied by the CRM team. This logic was leveraged for previous project stages to identify ‘definite duplicate’ versus ‘possible duplicate’.

Document: **Objective #1 Data merge rules**



**New contact level fields in Neptune:**

The following is a list of MVP fields for the new contact level. Mandatory fields (required in order to save the contact record) include asterisk.

**Individual contact records**:

* URN\* - this number will never change/make non-editable by end user
* Title\*
* Forename\*
* Surname\*
* Primary email address (optional but recommended)
* Secondary email address
* Add a tick box for “NO EMAIL”. When email address is provided the “NO EMAIL” box changes to unticked automatically
* Cell phone
* Home phone
* Office phone
* Fax number
  + For all phone/fax numbers, make association to contact NOT address
  + No phone/fax numbers are mandatory
  + Leave phone number field empty by default
  + Include international dialing code field for all phone/fax fields, as a separate 3 character field; this field may/not be driven by country of address
* DOB –
  + Formatting consistent DD/MM/YYYY
  + Provide a sample value in the field label to guide user to enter it correctly (no default)
* Nationality – 3 characters
* Passport/ID Card
  + Provide drop down menu with values: Passport, ID card - **Nice to have**
  + alphanumeric character field
  + Need flexibility to add additional drop down values (in addition to Passport/ID card)
* Passport/ID card expiry date - **Nice to have**
* Language – Preferred language; Neptune has code for language
* Lead passenger flag (who will be receiving the communication for the booking)

**Client type:**

* Client type should be at contact level (NE, NB, etc) instead of address level
  + Note: related requirement has been added to Objective #2 to update trigger to DW feed.
* Rules associated with the Client Type field:
* For new, manually added contacts it defaults to “NE” new enquirer but the user may override this.
* For new contacts via e-news signup it is NE
* When adding an enquiry or booking for the contact:
  1. If adding an enquiry and there are previous enquiries but no bookings the type becomes “PE” past enquirer.
  2. If adding a booking for the first time the type becomes “NB” new booker
  3. If adding a booking and there are previous bookings the type becomes “PC” past client.
  4. The above rules don’t apply for OW/FR/ST types
* **Communication preferences**:
  + By default everyone receives everything. Need to change the logic; by default should NOT receive the communication for any new contact;
  + If request online brochure then that corresponding value would untick.
  + Add new categories: e-news and TEXT MSG (service message)
* **Records details**:
  + Created: date/user ID
  + Last updated: date/user id
* **Client history**:
  + list history for the contact
  + have an audit for the contact – audit allows you to see every time the contact ID is updated, cases (customer service complaints), quotes
  + When a new client is created post-project implementation, the initial campaign source from their first inquiry shall be stored in the client history as the ‘Client Source’ with the “Client Source Description’ alongside the Client Created date.
* Search for contact –
  + Search for contact should mirror the search capabilities that exist for the Lead Party in Neptune today:
  + For strings, \* is usable as a wildcard matching any text.
    - A wildcard for date type fields is “:” - 01/01/2017:  denotes any date on or after this date; :01/01/2017 denotes any date before or on this date.
  + Any combination of the below listed fields may have a search string entered.
  + Title
  + Forename
  + Surname
  + Email address
  + Date of Birth
  + Last Correspondence
  + Contact
  + Company
  + Address
  + Town/City
  + County/State
  + Postal Code
  + Country
  + Tel No 1
  + Tel No 2
  + Tel No 3
  + Fax No
  + Record Type
  + Client Type
  + Category
  + Created/Date / User
  + Last Updated / Date / User
  + Mail No
  + URN
* **Editing/creating contact** – should be able to do the following:
  + Create new
  + Update
  + Merge, select one/other to merge
  + Close (not delete) (perhaps client status instead)
* Need client status: “GA” to indicate closed/open rather than delete from Neptune
  + these recorded at the client level
* MVP to see that they have a My Account
  + Not required to be able to see the details (My Account is coming in Jan; coming via CMS)
* 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:
  + Field mappings (Triton/Boxi/Hubspot/Feed parameters)
  + Diagrams
  + Timings
  + Specifications

Nice to haves for new client level fields in Neptune:

* Loyalty (does not yet exist in Neptune)
  + # bookings user has booked on home name
  + #hols - # of holidays with us
  + Nb pax: been on holiday as pax but not party leader
  + Nb paid: paid for but not consumed – e.g. gifted
  + NEEDS to be at contact level. Mentioned here so design does not paint us into a corner
* Secondary nationality field – 3 characters

Lowest priority for new client level fields in Neptune:

* Lifestyle/demographic – should be linked to contact not address
* ADMIN User – tick box – to allow the user name (objective to see that a person has a My Account) may be able to de-scope