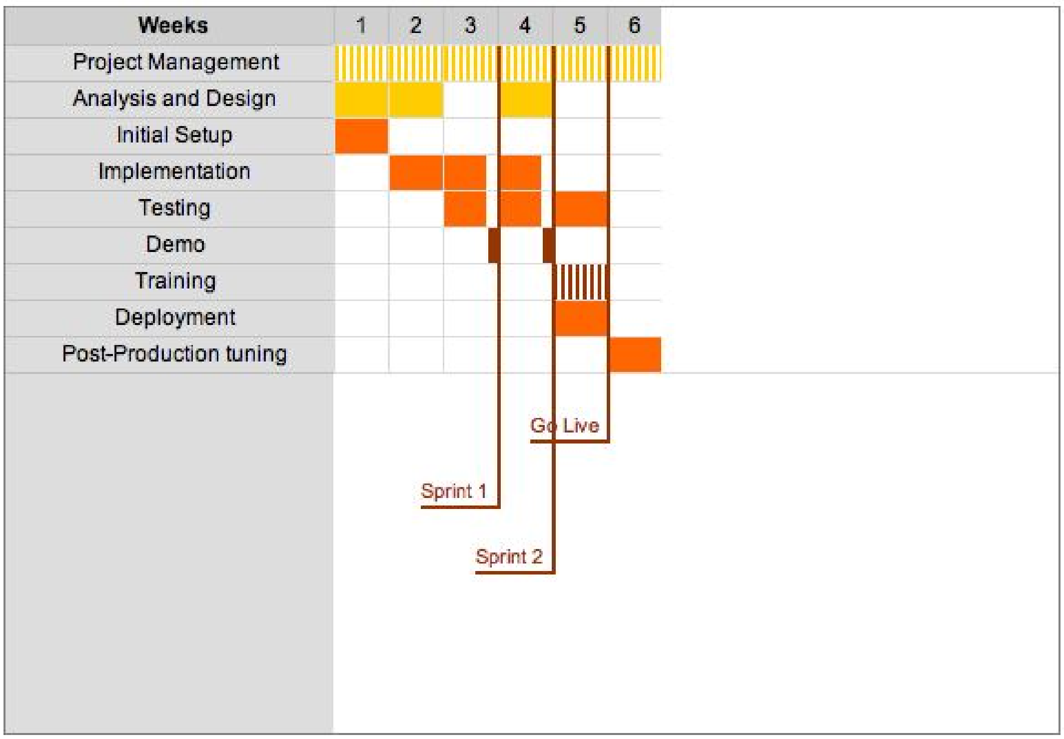
CRM - Customer and Contact Database (P1)

Customer and Contact Database will allow the management of customer information, in order to acquire deep knowledge of every customer and contact, and therefore facilitating collaboration and communication, building stronger and longer-lasting relationships.

Proposed Project Plan

The following project plan covers the entire delivery cycle from project initiation, to go live and production tuning.



Customer and Contact Management (S1.1)

The Customer and Contact Management will allow users to manage customer and contact information, enabling them to acquire deep knowledge of every customer and contact, and therefore facilitating collaboration and communication.

- **Backoffice to manage Customer Master Data (F1.1.1)** - The solution will provide a list to see all the customers, the ability to search and to see detail and edit customer info. Costumer information will include a list of relevant dates, such as contacts (individuals within the costumer) birthdates.
  The solution will also allow to list, define and remove costumer segments, which can be used on customer's details in order to aggregate customers in relevant business segments.
- **Customer and Contact Repository (F1.1.2)** - The solution will allow users to manage costumer's account data, including contact information, customer organization charts, the role that contacts play in the business relationship, relevant documents, and partners involved in the account. The solution will also enable the user to share

accounts and contacts and define who can see that shared data. When selecting an account a map of the address will be shown.

- **Integrated Customer History (F1.1.3)** - The solution will allow users to track and view all customer history in one place, including marketing campaigns, sales opportunities, customer service cases, and all interactions.
- **Customer Hierarchy (F1.1.4)** - The solution will allow users to define parent-child relationships between customers in order to depict complex organizations with multiple subsidiaries or divisions.
- **Team Account Management (F1.1.5)** - The solution will allow users to group organizational users involved in managing an account, along with their respective roles (executive sponsor, dedicated support rep and others). Automatic team assignments will be available.
- **Reference Management (F1.1.6)** - The solution will allow users to manage customer reference programs by identifying and managing the accounts that can serve as marketing and sales references. The solution will also track reference activities and communication with these critical customers.
- **Client Management (F1.1.7)** - The solution will allow users to track and manage relationships with individual clients who are not part of a corporate entity ("account").

Contact Activity History (S1.2)

As a customer representative, I want to be able to keep track of all interactions with the contacts in my database.

- **Activity List (F1.2.1)** - List all interactions with a given contact.

CRM - Product Catalog (P2)

The solution will support users on maintaining and securing product catalogs and price books centrally for increased consistency, while giving easy access to product and pricing information.

Product Catalog (S2.1)

The solution will support users on maintaining and securing product catalogs and price books centrally for increased consistency, while giving easy access to product and pricing information.

- **Master Product Catalog (F2.1.1)** - The solution will allow users to manage products and services, supporting multiple price books and multiple currencies. Will also enable to classify and group products into product families.
- **Product Families (F2.1.2)** - The solution will allow users to view all product families, create new ones or edit existing ones and to remove a product family.
- **Catalog Customizations (F2.1.3)** - The solution will allow users to create custom product fields and custom page layouts. Also, will enable users to link the product catalog to external product repositories.
- **Product Browsing (F2.1.4)** - The solution will allow users to search for price and product information.
- **Price Books (F2.1.5)** - The solution will allow users to set up price books for subsets of products and services in the master catalog. Users will be able to manage separate price books for different product families or customer segments.
- **Multicurrency Pricing (F2.1.6)** - The solution will support prices in multiple currencies for the same product and eliminate the need to maintain multiple price books for teams selling in different currencies.
- **Import and Export Products (F2.1.7)** - The solution will support exporting the list of products to an Excel File. It will also support importing products from a well formatted Excel file.

CRM - Customer Provisioning Workflow (P3)

Customer Provisioning Workflow will support the approval workflow for introducing new costumers and evaluate the costumer value.

Customer Provisioning Workflow (S3.1)

Customer Provisioning Workflow will support the approval workflow for introducing new costumers.

- **Costumer Creation Workflow (F3.1.1)** - The solution will support the costumer creation process which consists on an initial introduction of information on the proposed costumer, and then the solution will allow various levels of approval and information gathering (here we consider 3 levels) with associated email notifications.

Contract Management (S3.2)

The Contract Management will allow users to access integrated back-office financial functionality.

- **Approval Management (F3.2.1)** - The solution will allow users to automate the contract management and approval process to save time and respond to customers more quickly. It will also enable the use of security controls to ensure the appropriate people have access to the right customer contracts.
- **Renewal Management (F3.2.2)** - The solution will allow users to track contract expiration dates and initiate the contract renewal process with automatic notifications.
- **Contract Repository (F3.2.3)** - The solution will provide a contract repository back office view in order to improve tracking and management of key deal data, including contract terms, value, conditions, signatures and others.

CRM - Customer Visit Planner (P4)

Customer Visit Planner will support for planning visits to costumers, including the definition of routes.

Customer Visit Planner (S4.1)

Customer Visit Planner will support for planning visits to costumers, including the definition of routes. Routes are aggregations of related visits in order to accelerate the visits' planning.

- **Visits Management (F4.1.1)** - The solution will enable users to plan individual visits to customers. When creating or editing a visit the user will be able to define the periodicity of the visit, attach relevant documents, define if he wants to receive a remainder email, and how many days before the visit. The solution will validate if the visit does not conflict with previous scheduled visits.
- **Visits Agenda (F4.1.2)** - The solution will allow users to view all scheduled visits for a week and will be able to navigate to the next / previous week or to use a calendar to pick a week. The user will be able to export the weekly view of visits to an Excel file. The solution will also allow authorized users to view the agenda of all users.
- **Route Management (F4.1.3)** - The solution will support the definition of routes, which consists in an aggregation of visits related to each others (such as all in the same geographical zone). The user will be able to create or edit a route by giving it a name, defining which customers are included, the time per visit, the time interval between visits, which period of time the route will be active (start and end date), the days of the week and the periodicity of visits.
  Then the user will be able to generate the route, and view the generated visits on a weekly view. The solution will allow the user to edit the properties of each visit.
- **Integration with Exchange Server (Optional) (F4.1.4)** - The solution will support integration with Exchange Server in order to register visits.

CRM - Personal Home Page (P5)

Personal Home Page will provide access to a summary of all pending activities, visits scheduled for the current day and important dates coming up.

Home Page (S5.1)

Home Page will provide access to a summary of all pending activities, visits scheduled for the current day and important dates coming up.

- **Home Page (F5.1.1)** - The solution will provide an entry page containing a list of all pending activities (from the application workflows), a list with all important dates coming up (from the customers' details and Contract Management, if available) and a list of the daily scheduled visits (if the corresponding component is available).

CRM - Integration (P6)

Integration with other systems.

External Data (S6.1)

Connector for accessing external data sources.

- **Access External Data (F6.1.1)** - Integrate with MS SQL in order to access data tables (considering 20 entities).

API Integration (S6.2)

Connector for processing external API integrations.

- **External API Integration (F6.2.1)** - Integrate with external .NET APIs. Considering 5 .NET complex API calls.

CRM - Installation (P7)

Installation and setup procedures.

Enterprise Manager and eMailServices (S7.1)

Installing and setting up Enterprise Manager and eMailServices.

- **Installation (F7.1.1)** - Enterprise Manager and eMailServices Installation and setup.

Reporting Services (S7.2)

Installing and setting up Reporting Services.

- **Installation (F7.2.1)** - Reporting Services Installation and setup.

Audit Events (P8)

This component provides audit capabilities with the ability to specify modules and message types. Use it to create a centralized Auditing for your applications.

Modules Management (S8.1)

The user, with the right permissions, will be able to view a list of all existing Modules as well as search for a particular one. The user will be also able to create, edit or delete a specific Module.

- **Modules List (F8.1.1)** - The user can access all Modules using search options based on Module metadata, like name and other common fields.
- **Module Details (F8.1.2)** - The user, will be able to edit the details of a particular Module, as well create or delete a Module.

Audit Events Management (S8.2)

The user, with the right permissions, will be able to view a list of all existing Audit Events as well as search for a particular one. The user will be also able to see with all the details a particular Audit Event.

- **Audit Events List (F8.2.1)** - The user can access all Audit Events using search options based on Audit metadata, like date and other common fields.
- **Audit Event Details (F8.2.2)** - The user, will be able to view the details of a particular Audit Event.
- **Sales Territories (F8.2.3)** - The solution allows users to define and plan sales territories with multiple hierarchical levels.

Web Services API (S8.3)

A Web Services API is provided to allow interopability between this Solution and external Applications. In this case, it will allow to add new events and perform configuration actions.

- **Audit Event Creation (F8.3.1)** - Expose a Web Service, to allow the creation of Audit Events from external Applications.
- **Audit Events Solution Configuration (F8.3.2)** - Expose a Web Service, to allow the configuration of this Solution by external Applications.

Enterprise Manager (P9)

Enterprise Manager is a back-office portal that centralizes all common administration tasks such as users, roles, organizationï¿½s hierarchy management and the existing applicationsï¿½ back-offices.
By integrating every existing application back-office within Enterprise Manager, you will have one single control panel, a centralized way to manage users and one single entry point to administer every specific application.

Configuration (S9.1)

The user, with the proper role, can configure several settings of Enterprise Manager, like supported Languages, Locations, Global Settings and Organization details.

- **Bootstrap (F9.1.1)** - Automatic initial configuration. This process garantee that the application is up and running from day 1.
- **Global Settings List (F9.1.2)** - The user can access all Global Settings using search options based on a Global Setting metadata, like label and other common fields.
- **Global Settings Details (F9.1.3)** - The user will be able to edit the details of a particular Global Setting.
  Will be also possible to create, update and delete a Global Setting.
- **Languages List (F9.1.4)** - The user can access to a list of available Languages in Enterprise Manager.
  The user will also be able to activate or deactivate a specific Language.
- **Location List (F9.1.5)** - The user will have a Tree View of all available locations.
- **Location Details (F9.1.6)** - The user will be able to edit the details of a particular Location.
  Will be also possible to create, update and delete a Location.
- **Location Type List (F9.1.7)** - The user can access to a list of Location Types available in Enterprise Manager.
- **Location Type Details (F9.1.8)** - The user will be able to edit the details of a particular Location Type.
  Will be also possible to create, update and delete a Location Type.
- **Organization Node List (F9.1.9)** - The user will have a Tree View of all available Organization Nodes. A node can be a company instance, a department instance or represent other organization unit the user wishes to have.
- **Organization Node Details (F9.1.10)** - The user will be able to edit the details of a particular Organization Node.
  Will be also possible to create, update and delete an Organization Node.
- **Organization Node Type List (F9.1.11)** - The user will have a list of all available Organization Node Types. A Node Type can be Company or Department, for example.
- **Organization Node Type Details (F9.1.12)** - The user will be able to edit the details of a particular Organization Node Type.
  Will be also possible to create, update and delete an Organization Node Type.
- **Functional Groups List (F9.1.13)** - The user will have a list with search options of all available Functional Groups. A functional groups is like a team in an Organization Node.
- **Funcional Groups Details (F9.1.14)** - The user will be able to edit the details of a particular Functional Group.
  Will be also possible to create, update and delete a Functional Group.

Application Management (S9.2)

The user, with the proper role, can add, configure or remove compatible Applications from Entreprise Manager.

- **Control Panel (F9.2.1)** - The user can add Applications to Enterprise Manager Tree View by editing its details, its privileges and uploading an icon file or an excel configuration file.
  The user have also the possibility of removing an Application.
- **Application List (F9.2.2)** - The user can access to a list of Applications that are integrated in Enterprise Manager.
- **Applications' Privileges List (F9.2.3)** - The user can access to a list of Privileges of a specific Application.
- **Import Applications (F9.2.4)** - The user can choose, from a set of compatible applications, one to integrate with Enterprise Manager.
  After that choice it's possible to select the desired Application's Entry Points and perform an Import action, that will import all settings and bootstrap the selected Application, using Web Services.
- **FrontOffice Entry Point List (F9.2.5)** - The user can access to a list of FrontOffice Entry Points for all integrated Applications.
- **FrontOffice Entry Point Details (F9.2.6)** - The user will be able to edit the details of a particular FrontOffice Entry Point.
  Will be also possible to create, update and delete a FrontOffice Entry Point.

User Management (S9.3)

The user, with the proper role, will be able to create, edit and delete users. It will also be possible to manage roles, relations, privileges and delegation motives.

- **User List (F9.3.1)** - The user can access all Users using search options based on an User metadata, like name, e-mail, and other common fields.
- **User Details (F9.3.2)** - The user will be able to:

  - Edit General Details;
  - Manage Roles;
  - Manage Privileges;
  - Manage Relations;
  - Change Password;.
- **Role List (F9.3.3)** - The user can access all Roles using search options based on an User metadata, like name and other common fields.
- **Role Details (F9.3.4)** - The user will be able to edit the details of a particular Role.
  Will be also possible to create, update and delete an Role.
- **Privileges List (F9.3.5)** - The user can access all Privileges using search options based on an User metadata, like name and other common fields.
- **Privileges Details (F9.3.6)** - The user will be able to edit the details of a particular Privilege.
  Will be also possible to create, update and delete an Privilege.
- **Relation Type List (F9.3.7)** - The user can access all Relation Types using search options based on an User metadata, like name and other common fields.
- **Relation Type Details (F9.3.8)** - The user will be able to edit the details of a particular Relation Type.
  Will be also possible to create, update and delete an Relation Type.
- **Delegation Motive List (F9.3.9)** - The user will have a list of all available Delegation Motives.
- **Delegation Motive Details (F9.3.10)** - The user will be able to edit the details of a particular Delegation Motive.
  Will be also possible to create, update and delete an Delegation Motive.

User Details (S9.4)

The user, with the right permissions, will be able to view and edit all the details about a particular User.

- **User Details (F9.4.1)** - The User, will be able to view all the details of a particular User.

  A set of verifications are performed is this view.

  The user will be also be able to:
  - Edit the common and main fields of that User, like the name, the e-mail, etc;
  - Edit, add and revoke User roles and permissions;
  - Edit, add and remove User relations with other users;

Single Sign-On Management (S9.5)

All the management about the login is performed in this package.

- **Single Sign-On Login (F9.5.1)** - The user can perfom the login by writing his autentication details, like username and password. This view is common to the entire Solution.
  The single sign-on process is executed to garantee that the user is correctly authenticated, that has the right role to access, etc.
- **Single Sign-On Support (F9.5.2)** - A set of support funcionality to the single sign-on process, like:
  - Logout Process;
  - Login Redirector;
  - Error Handlers;
  - Permission Handlers;
  - Extended Login Handler;
  - User Master Management;

  .

Enterprise Manager Base (S9.6)

All login management is performed in this package.

- **Header and Footer (F9.6.1)** - The Header and Footer that will be used across the entire Solution.
- **Body Structure (F9.6.2)** - Tree View with all the Applications that are integrated with Enterprise Manager and the view of each of those Applications.

Enterprise Manager - Installation & Look and Feel (P10)

Look and feel customization, initial setup and Active Directory integration.

Style Integration and Installation (S10.1)

Customize the particular needs for CSS, Images and HTML.
Initial configuration and bootstrap

- **Style Customization (F10.1.1)** - Following the standard StyleGuide, customize the particular needs for CSS, Images and HTML..
- **Initial Configuration and Bootstrap (F10.1.2)** - Install Enterprise Manager, define and configure the initial users, roles and applications.

LDAP (S10.2)

- **LDAP Integration (F10.2.1) -** Integrate the Enterprise Manager Single Sign-On funcionality, with LDAP.