

Chapter 1: Identifying Requirements

Setup Home Object Manager

Q duplicate

Data

- Duplicate Management
 - Duplicate Error Logs
 - Duplicate Rules
 - Matching Rules

Didn't find what you're looking for? Try using Global Search.

Setup Duplicate Rules

Contact Duplicate Rule

Contact Dupe Rule

Duplicate Rule Detail

Rule Name: Contact Dupe Rule Order: 2 of 2 [Reorder]

Description: Contact with Same Email ID and Last Name cannot be created

Object: Contact

Record-Level Security: Enforce sharing rules

Action On Create: Block Operations On Create: Alert Report

Action On Edit: Allow Operations On Edit: Alert Report

Alert Text: Contact with Same Email ID and Last Name exists! Do you really want to create a Dupe record?

Active: ☒

Matching Rule: ☒ Contact Dupe Rule matching rule ☒ Mapped Matching Criteria: (Contact: Lastname EXACT MatchBlank = FALSE) AND (Contact: Email EXACT MatchBlank = FALSE)

Conditions

Created By: SM Business Analysis, 3/15/2022 11:50 AM Modified By: SM Business Analysis, 3/15/2022 11:56 AM

Edit Delete Clone Deactivate

New Contact

Contact Information

Contact Owner: SM Business Analysis Phone:

*Name

Salutation: Mr.

First Name: Business1

*Last Name: Analyst

Account Name: Business Analysis LLC Mobile:

Title: Other Phone:

Department:

Birthdate:

Reports To:

business@analyst.com

Lead Source: --None--

We hit a snag.

You can't save this record because a duplicate record already exists. To save, use different information.

[View Duplicates](#)

Cancel Save & New Save

View Duplicates

Contact with Same Email ID and Last Name exists! Do you really want to create a Dupe record?

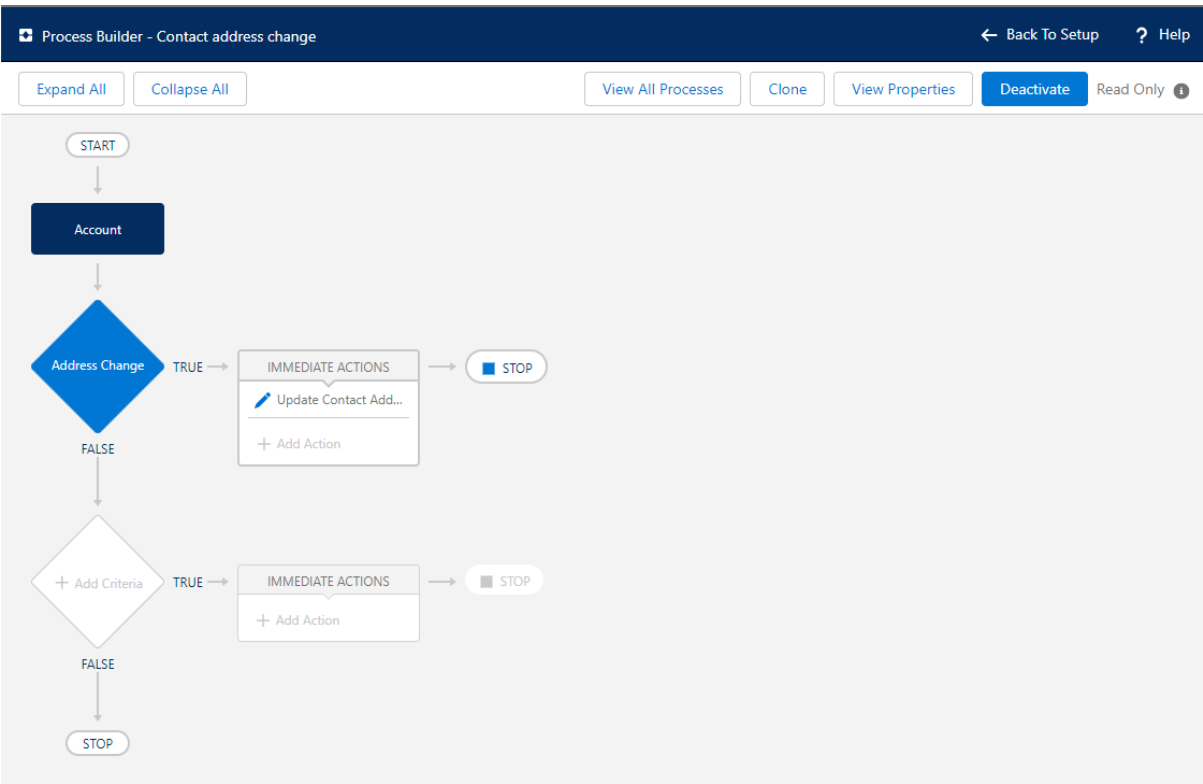
CONTACT (1)



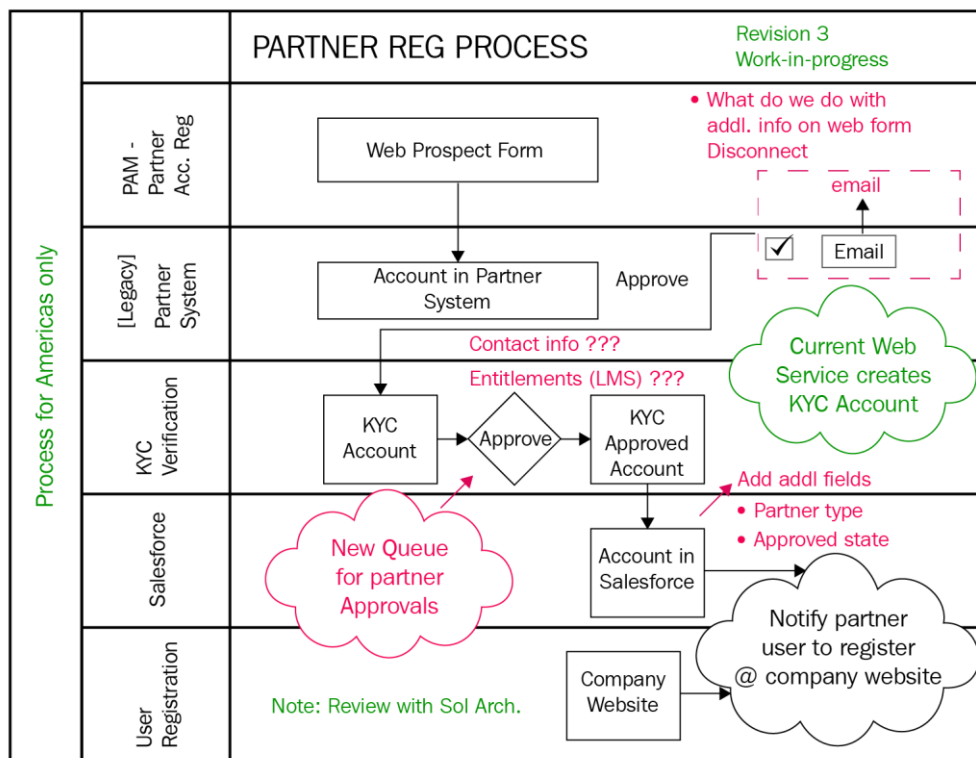
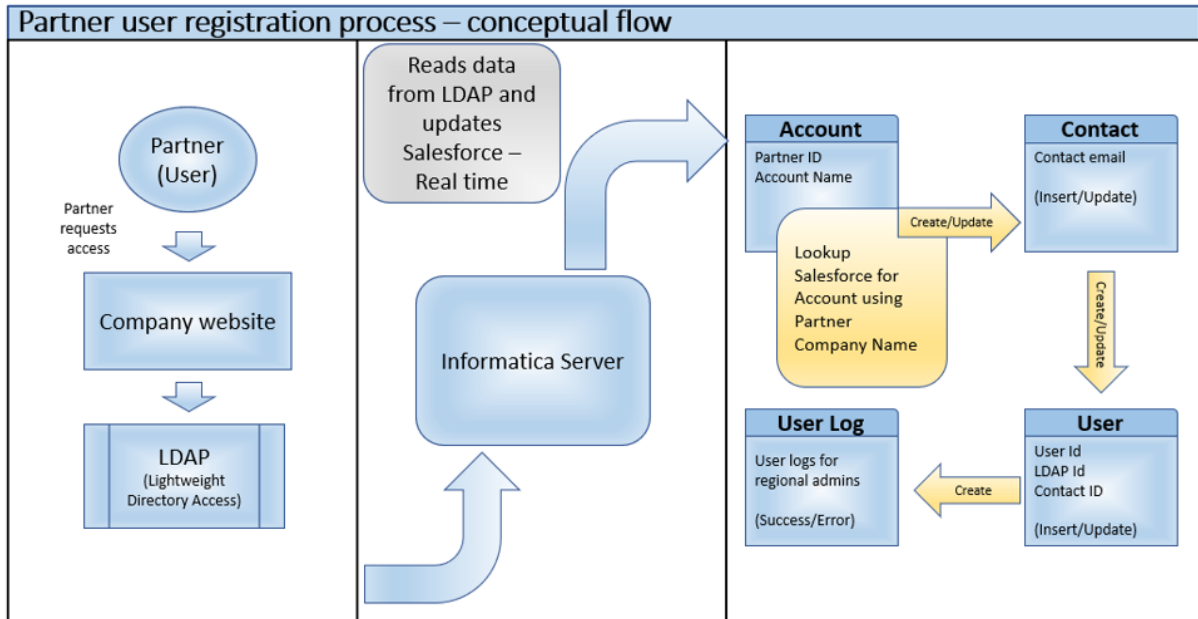
Business1 Analyst
Contact

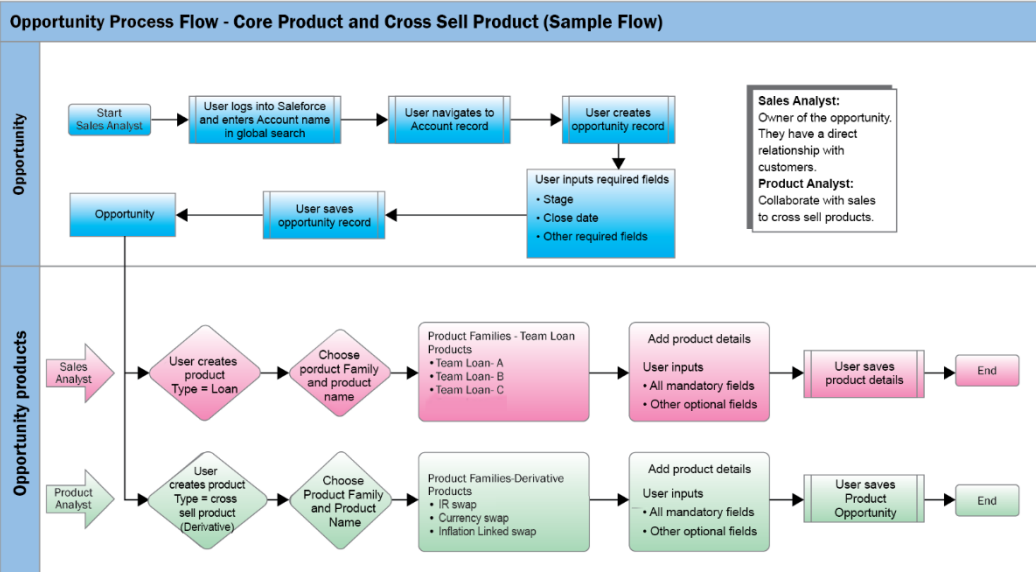
Name: Business1 Analyst
Account Name: Business Analysis LLC
Account Site:
Phone:
Email: business@analyst.com
Contact Owner Alias: SMun

[Open This Contact](#)



Chapter 2: Elicitation and Document Requirements

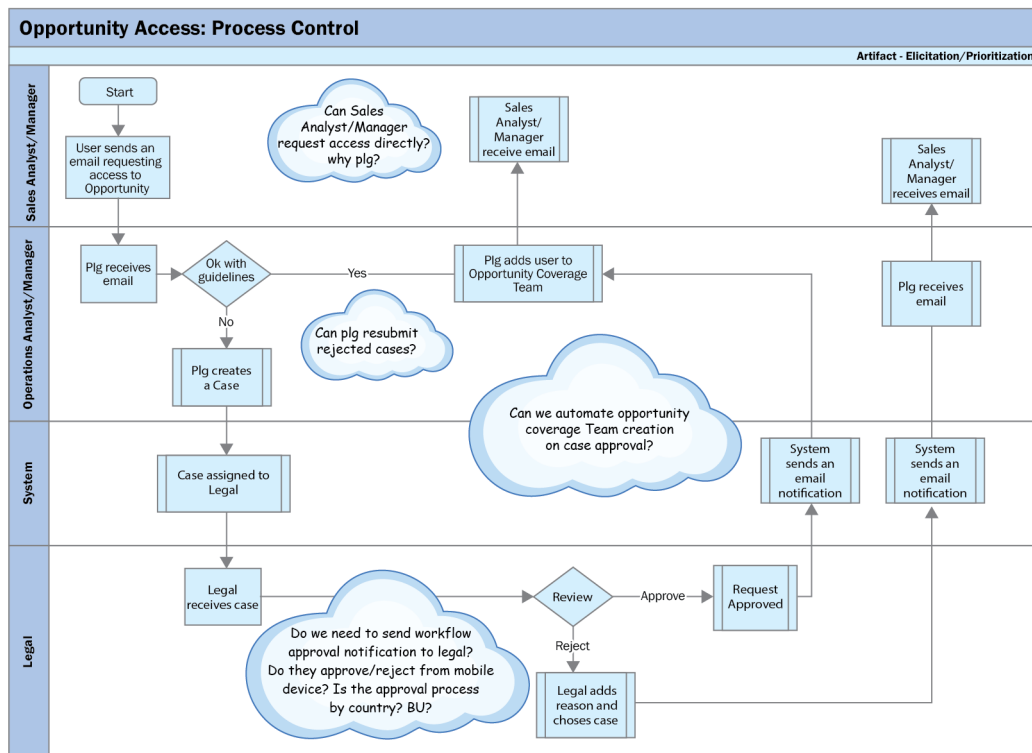




Chapter 3: Prioritizing Requirements

| Prioritized Buckets | | | | | |
|----------------------------|-------------|----------------------------|-------------|----------------------------|-------------|
| Priority 1 | | Priority 2 | | Priority 3 | |
| Bucket 1 (3 Month Release) | | Bucket 2 (6 Month Release) | | Bucket 3 (3 Month Release) | |
| Priority | Requirement | Priority | Requirement | Priority | Requirement |
| 1 | Function -A | 1 | Function -D | 1 | Function -H |
| 2 | Function -B | 2 | Function -E | 2 | Function -I |
| 3 | Function -C | 3 | Function -F | 3 | Function -J |
| | | 4 | Function -G | | |

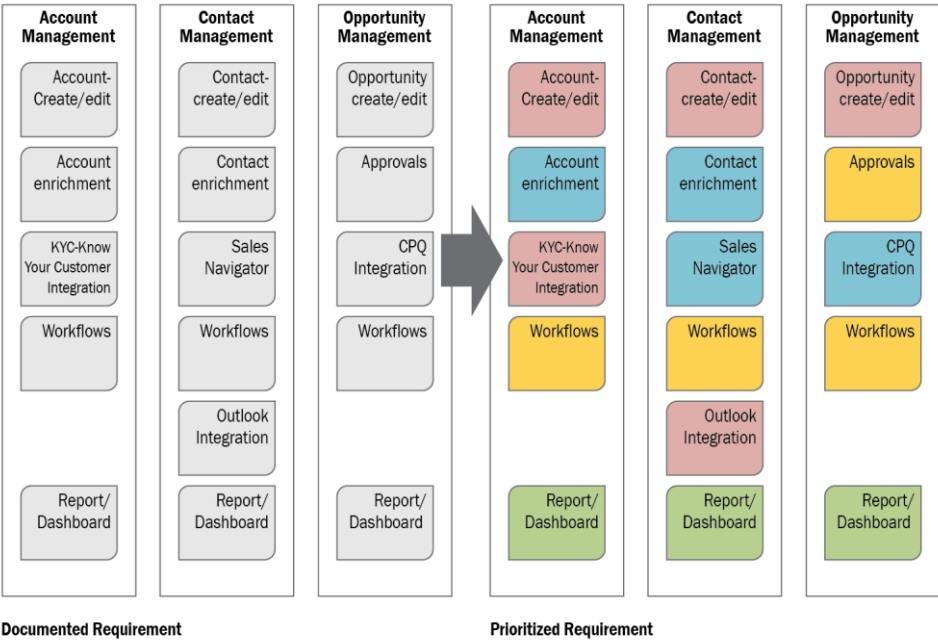
| Project Roadmap -FY22/FY23 | | | | | | | | |
|----------------------------|------------------------------|--------------------------------|----|------------------------------|----------------------------------|----|------------------------------|----|
| | FY2022 | | | | FY2023 | | | |
| Roadmap | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 |
| Release -1 | Priority 1 Function A,B,C | | | | | | | |
| Release -2 | | Priority 2 Function D,E,F,G | | | | | | |
| Release -3 | | | | Priority 3 Function H,I,J | | | | |
| Release -4 | | | | | Priority 4 Function K,L,M,N,O | | | |
| Release -5 | | | | | | | Priority 5 Function P,Q,R | |



| Option 1 | |
|----------|-------------|
| Priority | Requirement |
| 1 | A |
| 2 | B |
| 3 | C |
| 4 | D |
| 5 | E |
| 6 | F |
| 7 | G |
| 8 | H |
| 9 | I |
| 10 | J |

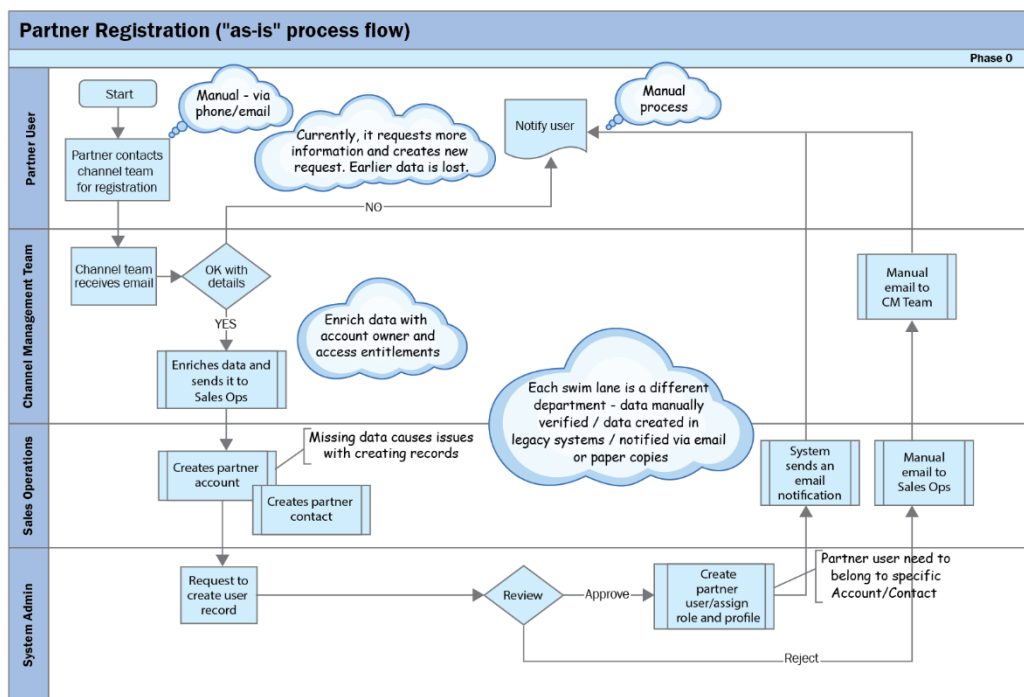
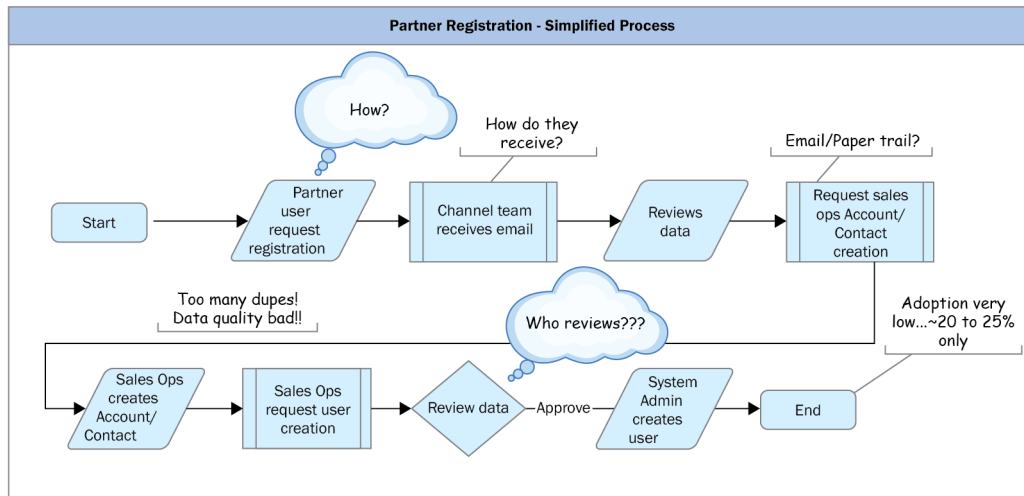
| Option 2 | |
|----------|-------------|
| Priority | Requirement |
| 1 | A |
| 2 | F |
| 3 | B |
| 4 | C |
| 5 | D |
| 6 | E |
| 7 | G |
| 8 | H |
| 9 | I |
| 10 | J |

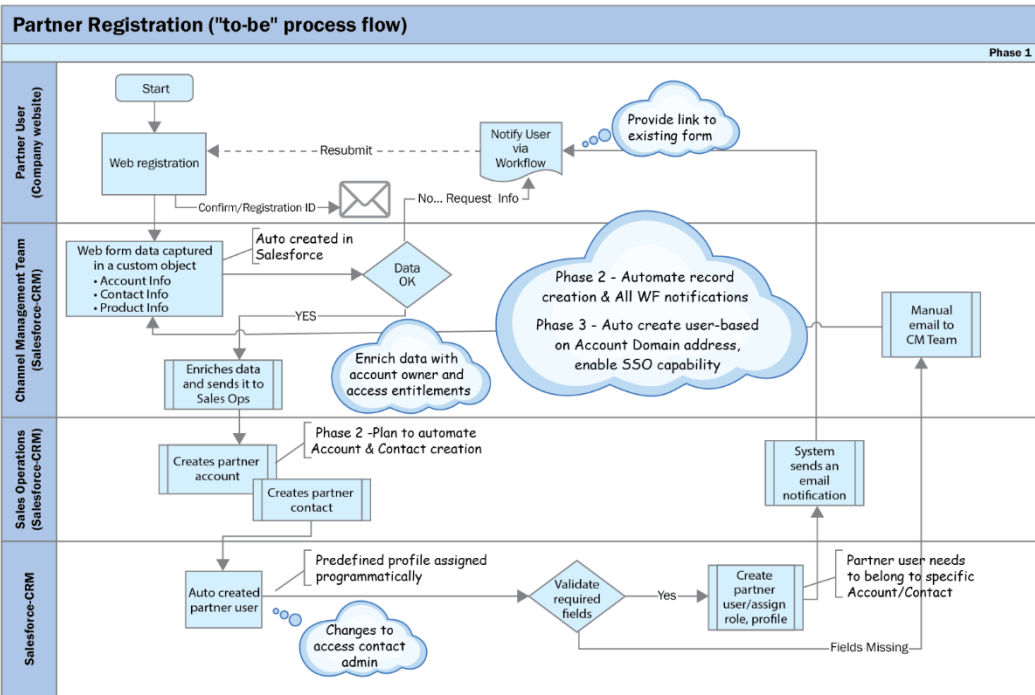
| Option 3 | |
|----------|-------------|
| Priority | Requirement |
| 1 | Ax |
| 2 | B |
| 3 | C |
| 4 | D |
| 5 | E |
| 6 | Ay+F |
| 7 | G |
| 8 | H |
| 9 | I |
| 10 | J |



| | Account Management | Contact Management | Opportunity Management |
|-------------|--|---|---|
| Release - 1 | <div>Account-create/edit</div> <div>KYC-Know Your Customer Integration</div> | <div>Contact-create/edit</div> <div>Outlook Integration</div> | <div>Opportunity create/edit</div> |
| Release - 2 | <div>Workflows</div> | <div>Workflows</div> | <div>Approvals</div> <div>Workflows</div> |
| Release - 3 | <div>Account enrichment</div> | <div>Contact enrichment</div> <div>Sales Navigator</div> | <div>CPQ Integration</div> |
| Release - 4 | <div>Report/Dashboard</div> | <div>Report/Dashboard</div> | <div>Report/Dashboard</div> |

Chapter 4: Process Flows - "As-is" versus "To-be"

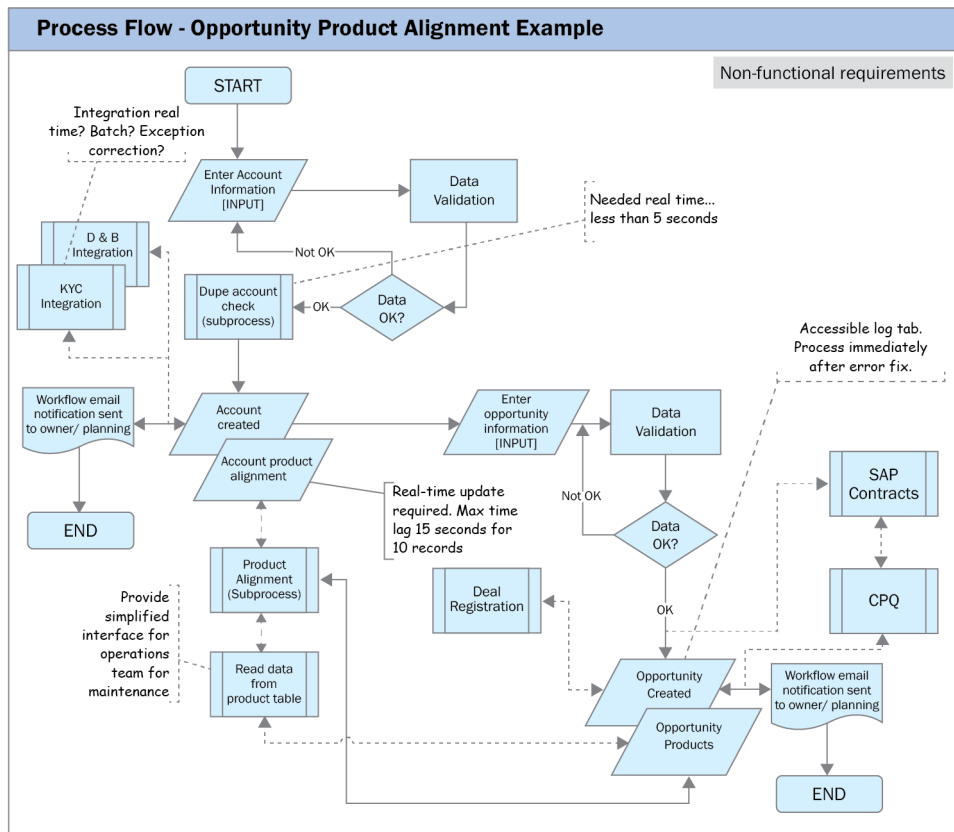
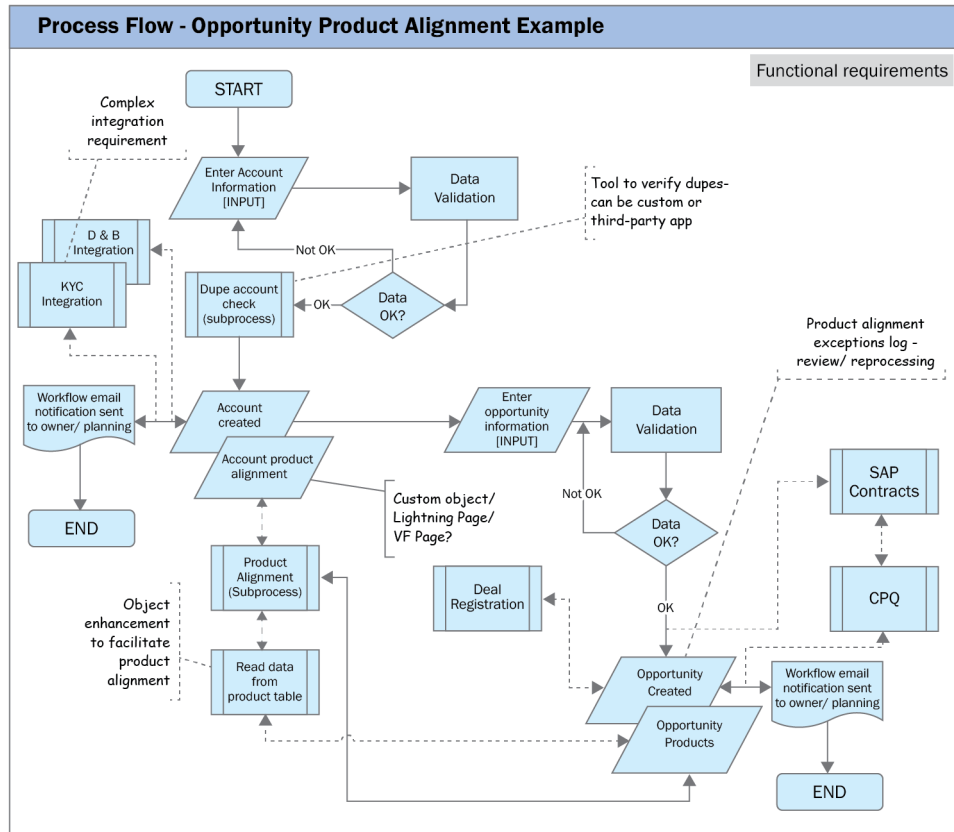




Chapter 5: Business Requirements Document

No images...

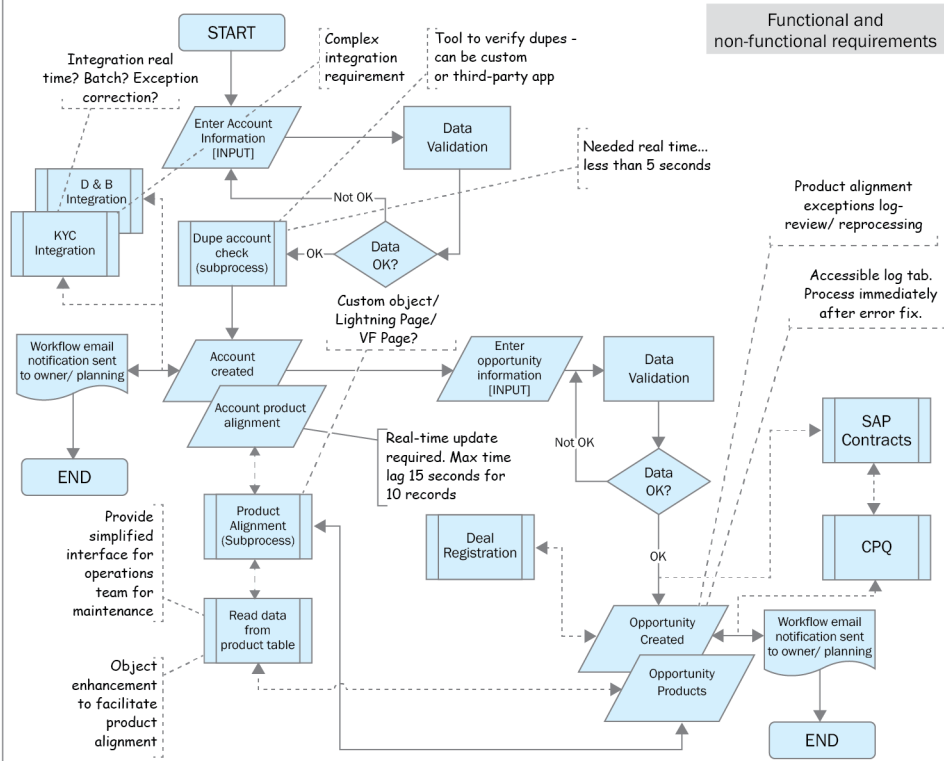
Chapter 6: Solution Design and Functional Document



Process Flow - Opportunity Product Alignment Example

```

graph TD
    START([START]) --> Input1[/Enter Account Information [INPUT]/]
    Input1 --> DataVal1[Data Validation]
    DataVal1 --> DataOK1{Data OK?}
    DataOK1 -- Not OK --> DupeCheck[Dupe account check subprocess]
    DupeCheck --> Input1
    DataOK1 -- OK --> AccountCreated[Account created]
    AccountCreated --> AccountAlign[/Account product alignment/]
    AccountAlign --> Input2[/Enter opportunity information [INPUT]/]
    Input2 --> DataVal2[Data Validation]
    DataVal2 --> DataOK2{Data OK?}
    DataOK2 -- Not OK --> SAP[SAP Contracts]
    SAP <--> CPQ[CPQ]
    CPQ --> Input2
    DataOK2 -- OK --> OppCreated[/Opportunity Created/]
    OppCreated --> OppProducts[/Opportunity Products/]
    OppProducts --> Email1[/Workflow email notification sent to owner/ planning/]
    Email1 --> END1([END])
    
    %% Integrations and Subprocesses
    DB[D & B Integration] --> Input1
    KYC[KYC Integration] --> Input1
    DataVal1 --- Tool[Tool to verify dupes - can be custom or third-party app]
    AccountAlign --- Custom[Custom object/ Lightning Page/ VF Page?]
    AccountAlign --> ProductAlignSub[Product Alignment Subprocess]
    ProductAlignSub --> ReadData[Read data from product table]
    ReadData --> ProductAlignSub
    ReadData --- Enhance[Object enhancement to facilitate product alignment]
    ProductAlignSub --> DealReg[Deal Registration]
    DealReg --> OppCreated
    OppCreated --> Email2[/Workflow email notification sent to owner/ planning/]
    Email2 --> END2([END])
    
    %% Annotations
    START --- Note1[Integration real time? Batch? Exception correction?]
    DataVal1 --- Note2[Complex integration requirement]
    DataVal2 --- Note3[Needed real time... less than 5 seconds]
    SAP --- Note4[Product alignment exceptions log-review/ reprocessing]
    CPQ --- Note5[Accessible log tab. Process immediately after error fix.]
    AccountAlign --- Note6[Real-time update required. Max time lag 15 seconds for 10 records]
    ProductAlignSub --- Note7[Provide simplified interface for operations team for maintenance]
  
```



Chapter 7: Demonstrate Functionality Using Prototypes

[illegible]

Account screen layout

| Account Name | <div> <div>Edit</div> <div>Save</div> <div>—</div> <div>—</div> </div> <div>Action Panel</div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|----------|-------------------|------|-------|----------|--------|----------|---------------------|--|---------------|----------|-------|-------|----------|----------|-------|-------|----------|----------|-------|-------|----------|--------|-------|-------|-------------------|----------|-------|-------|----------|----------|-------|-------|----------|----------|-------|-------|----------|
| <div>Key attributes highlight Panel</div> <table border="1"> <thead> <tr> <th>TYPE</th> <th>OWNER</th> <th>INDUSTRY</th> <th>ACC ID</th> </tr> </thead> <tbody> <tr> <td>Contacts</td> <td colspan="2">Account detail page</td> <td>Opportunities</td> </tr> <tr> <td>1. _____</td> <td>_____</td> <td>_____</td> <td>1. _____</td> </tr> <tr> <td>2. _____</td> <td>_____</td> <td>_____</td> <td>2. _____</td> </tr> <tr> <td>3. _____</td> <td>_____</td> <td>_____</td> <td>3. _____</td> </tr> <tr> <td>XXXXXX</td> <td>_____</td> <td>_____</td> <td>Product alignment</td> </tr> <tr> <td>1. _____</td> <td>_____</td> <td>_____</td> <td>1. _____</td> </tr> <tr> <td>2. _____</td> <td>_____</td> <td>_____</td> <td>2. _____</td> </tr> <tr> <td>3. _____</td> <td>_____</td> <td>_____</td> <td>3. _____</td> </tr> </tbody> </table> | | | | TYPE | OWNER | INDUSTRY | ACC ID | Contacts | Account detail page | | Opportunities | 1. _____ | _____ | _____ | 1. _____ | 2. _____ | _____ | _____ | 2. _____ | 3. _____ | _____ | _____ | 3. _____ | XXXXXX | _____ | _____ | Product alignment | 1. _____ | _____ | _____ | 1. _____ | 2. _____ | _____ | _____ | 2. _____ | 3. _____ | _____ | _____ | 3. _____ |
| TYPE | OWNER | INDUSTRY | ACC ID | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Contacts | Account detail page | | Opportunities | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. _____ | _____ | _____ | 1. _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. _____ | _____ | _____ | 2. _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. _____ | _____ | _____ | 3. _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| XXXXXX | _____ | _____ | Product alignment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. _____ | _____ | _____ | 1. _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. _____ | _____ | _____ | 2. _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. _____ | _____ | _____ | 3. _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Product alignment screen layout

| | | | | | |
|-------------------------------------|-----------------|-----------------|-----------------|------|------|
| Account Name | | | | Edit | Save |
| Active | Product Field 1 | Product Field 2 | Product Field 3 | | |
| <input checked="" type="checkbox"/> | _____ | _____ | _____ | | |
| <input checked="" type="checkbox"/> | _____ | _____ | _____ | | |
| <input type="checkbox"/> | _____ | _____ | _____ | | |

Account screen layout (sales team view)

Account

Srini Business Analyst LLC.

Edit

Delete

New Contact

New Opportunity

Manage Product Alignment

Files

| Type | Account Owner | Industry | D-U-N-S Number |
|----------|---------------|------------|----------------|
| Prospect | smunagavalasa | Technology | 012345678 |

Contacts

Contact 1

Contact 2

Contact 3

Account Details

Account Name

Srini Business Analyst LLC.

Account ID

Acc-000001

Account Owner

smunagavalasa

Account Street

007 Sri Circle

Account City

New York

Account State

NY

Company Description

Srini Business Analysts LLC

Industry

Technology

Sub Industry

Software

D-U-N-S Number

012345678

Federal Taxpayer ID

00-0000000

Account Postal Code

10001

Account Country

United States

Opportunities

Opportunity 1

Opportunity 2

Opportunity 4

Files

Attachment 1

Attachment 2

Attachment 3

Product Alignment

Product 1

Product 2

Product 3

Save

Cancel

Product alignment screen layout

Account

Srini Business Analyst LLC.

Edit

Delete


| Active | Product Name | Product Family | Product ID |
|-------------------------------------|----------------|------------------|------------|
| <input checked="" type="checkbox"/> | Product Name-1 | Product Family-1 | Prd-100001 |
| <input checked="" type="checkbox"/> | Product Name-2 | Product Family-2 | Prd-100002 |
| <input checked="" type="checkbox"/> | Product Name-3 | Product Family-3 | Prd-100003 |
| <input type="checkbox"/> | Product Name-4 | Product Family-3 | Prd-100004 |

Save

Cancel

Account screen layout (service team view)

Account

Srini Business Analyst LLC. 

Edit

New Contact


Activities


New Case


Files

| Account Level | Account Owner | Industry | Account Address |
|---------------|---------------|------------|-----------------|
| Platinum | smunagavalasa | Technology | 012345678 |

Contacts

 Contact 1

 Contact 2

 Contact 3

Account Details

Account Name

Srini Business Analyst LLC.

Account ID

Acc-000001

Account Owner

smunagavalasa

Account Street

007 Sri Circle

Account City

New York

Account State

NY

Company Description

Srini Business Analysts LLC

Industry

Technology

Sub Industry

Software

Do Not Contact

☒

Account Level

Platinum


Account Postal Code


10001


Account Country

United States


Cases


 Case 1


 Case 2

 Case 3


Product Alignment


 Product 1


 Product 2

 Product 3

Activities

 Message 1

 Message 2

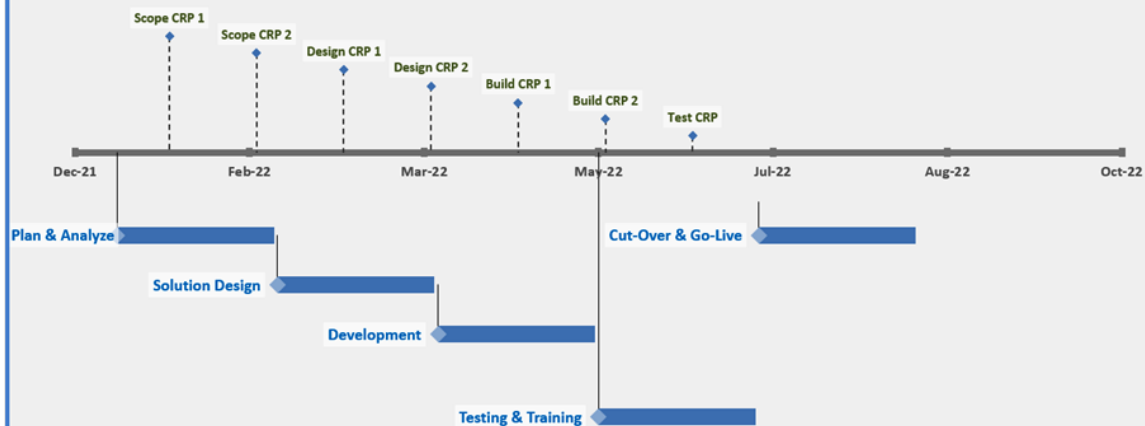
 Message 3

Save

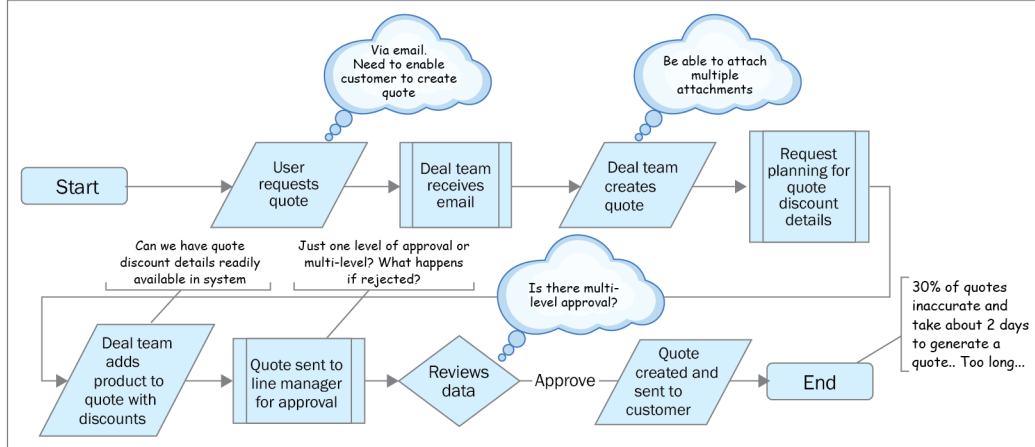
Cancel

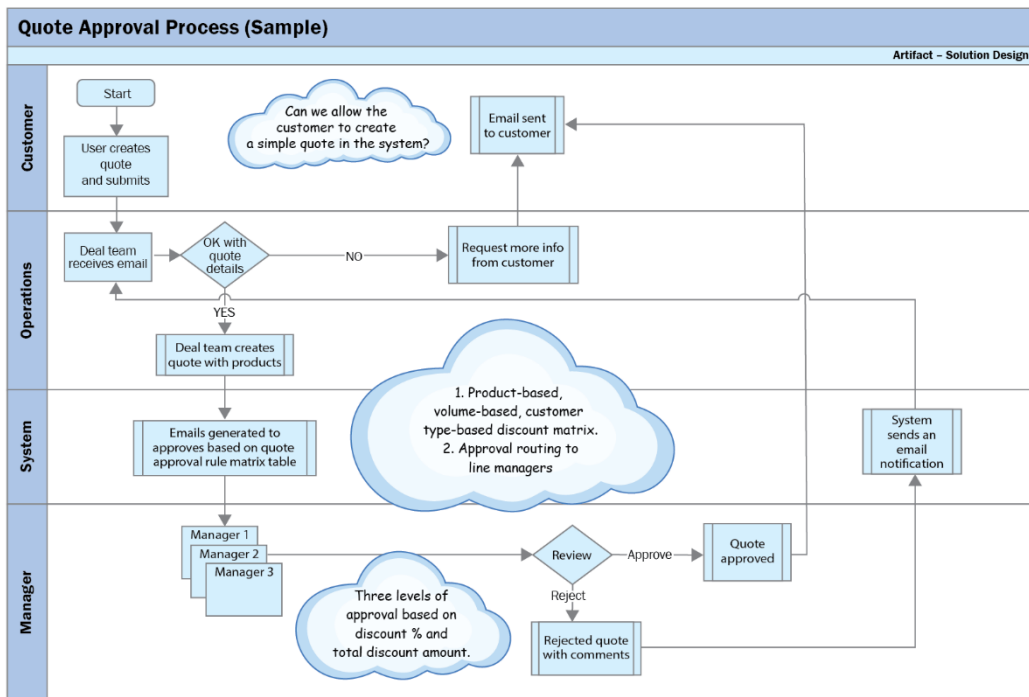
Chapter 8: Exploring Conference Room Pilots

Conference Room Pilot Schedule - Sample



Quote Approvals - Simplified Process





Sales

Home

Accounts

Contacts

Opportunities

Campaigns

Files

Leads

Tasks

Quotes

More

Quote

Srini Consulting - Quote2

Create PDF

Edit

Submit for Approval

Email Quote

Stop Sync

Details

Quote Number

00000002

Expiration Date

7/31/2022

Quote Name

Srini Consulting - Quote2

Syncing

☒

Opportunity Name

Srini BA Consultants-Deal01

Status


Presented

Account Name

Srini BA Consultants

Description

Owner Name

 SM Business Analysis

Contract

Quote To

> Totals

> Address Information

> System Information

Quote Line Items (3)

Add Products

Edit Products

3 items • Sorted by Sort Order • Updated 2 minutes ago

| Product | Sales Price | Quantity | Subtotal | Discount | Total Price | List Price | Product Code |
|-----------------------------|-------------|----------|------------|----------|-------------|-------------|---------------------------|
| 1 Product 1 | \$100.00 | 10.00 | \$1,000.00 | 12.50% | \$875.00 | \$87,500.00 | Product 1 |
| 2 Product 3 | \$200.00 | 4.00 | \$800.00 | 7.25% | \$742.00 | \$23,000.00 | Product 3 |
| 3 Product 2 | \$150.00 | 8.00 | \$1,200.00 | 10.00% | \$1,080.00 | \$4,500.00 | Product 2 |

View All

Company Address US

Created Date 10/11/2022

Expiration Date 7/31/2022

Quote Number 00000002

Prepared By SM Srini munagavalasa
Phone (631) 942-5609
Email srini.munagavalasa@gmail.com

Bill To Name Srini BA Consultants
Bill To 1251 NY - 312 Constitution Place
 Austin, TX 78767
 USA
 Austin, TX

Ship To Name Srini BA Consultants
Ship To 1251NY-312 Constitution Place
 Austin, TX 78767
 USA

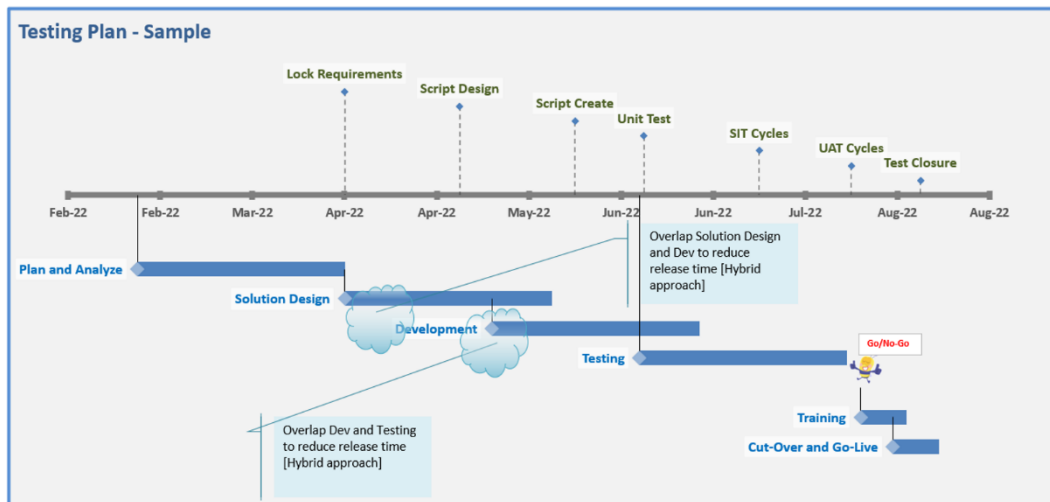
| Product | List Price | Sales Price | Quantity | Discount | Total Price |
|-----------|-------------|-------------|----------|----------|-------------|
| Product 1 | \$87,500.00 | \$100.00 | 10.00 | 12.50% | \$875.00 |
| Product 2 | \$4,500.00 | \$150.00 | 8.00 | 10.00% | \$1,080.00 |
| Product 3 | \$23,000.00 | \$200.00 | 4.00 | 7.25% | \$742.00 |

Subtotal \$3,000.00
Discount 10.10%
Total Price \$2,697.00
Grand Total \$2,697.00

Quote Acceptance Information

Signature _____
Name _____
Title _____
Date _____

Chapter 9: Technical and Quality Testing



| CRM Global Rollout | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|-------------|------------|----------|------|--------------|----|----|----|----|----|----|--------------|----|----|----|----|----|----|-------------|---|---|---|---|---|---|-------------|---|----|----|----|----|----|--------------|----|----|----|----|----|----|--------------|----|----|----|----|----|----|--------------|----|----|---|---|---|---|
| Srini LLC(Demo Company) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PM - S Munagavalasa | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | Jul 18, 2022 | | | | | | | Jul 25, 2022 | | | | | | | Aug 1, 2022 | | | | | | | Aug 8, 2022 | | | | | | | Aug 15, 2022 | | | | | | | Aug 22, 2022 | | | | | | | Aug 29, 2022 | | | | | | |
| | | | | | 10 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 1 | 2 | 3 | 4 |
| Project Task | % Completed | Task Start | Task End | Days | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | | | | | | | |
| Release 1 - SIT | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SIT Cycle 1 | 100% | 7/11/22 | 7/15/22 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SIT Cycle 2 | 100% | 7/18/22 | 7/22/22 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SIT Cycle 3 | 25% | 7/23/22 | 7/29/22 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Regression | 0% | 8/1/22 | 8/5/22 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Prep for UAT | 0% | 8/1/22 | 8/12/22 | 12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Release 1 - UAT | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UAT Cycle 1 | 8/15/22 | 8/19/22 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UAT Cycle 2 | 8/22/22 | 8/26/22 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Release 1 Deployment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cut-over Prep | 8/15/22 | 8/26/22 | 12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cut-over | 8/27/22 | 8/28/22 | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Go-Live | 8/29/22 | 8/29/22 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Note: Cut-over to production scheduled during weekend to minimize business disruption | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| SIT Test Scripts | | | | | | | | | | | | | | | | System Integration Testing - Cycle 1 (2 weeks starting MM/DD/YYYY) | | | | | | | | | | | | | | | |
|------------------|------------------|--------------------------|------------------------|------------------|---------------|------------|--|------------------------|--------------|-------|------------------------|--------------------------|--------------------------|--------------------|-----------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Test Script ID | Test Script Name | Test Script Description | Pre Conditions | Test System Name | BRD ID | Complexity | Variations | Database Table/ Object | Test Case ID | Cycle | Planned Execution Date | Test Case Description | Test Case Result | Responsible Tester | Results | | | | | | | | | | | | | | | | |
| TS ID 1 | TS Name 1 | xxx xxxxxx xxxxxxxx xxxx | 1. xxxxxx 2. xxxxxx | Salesforce | BRD x.y.z.u.v | M | Sales Analysts Sales Manager Planning | Account | TC-001 | 1 | | xxx xxxxxx xxxxxxxx xxxx | xxx xxxxxx xxxxxxxx xxxx | xxxxxx | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| TS ID 1 | TS Name 1 | xxx xxxxxx xxxxxxxx xxxx | 1. xxxxxx 2. xxxxxx | Salesforce | BRD x.y.z.u.v | M | Service Analyst Service Manager Planning | Account | TC-002 | 1 | | xxx xxxxxx xxxxxxxx xxxx | xxx xxxxxx xxxxxxxx xxxx | xxxxxx | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| TS ID 1 | TS Name 1 | xxx xxxxxx xxxxxxxx xxxx | 1. xxxxxx 2. xxxxxx | Salesforce | BRD x.y.z.u.v | M | Compliance Legal | Account | TC-003 | 1 | | xxx xxxxxx xxxxxxxx xxxx | xxx xxxxxx xxxxxxxx xxxx | xxxxxx | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| TS ID 2 | TS Name 2 | xxx xxxxxx xxxxxxxx xxxx | 1. xxxxxx 2. xxxxxx | Salesforce | BRD x.y.z.u.v | M | Sales Analysts Sales Manager Planning | Account | TC-004 | 1 | | xxx xxxxxx xxxxxxxx xxxx | xxx xxxxxx xxxxxxxx xxxx | xxxxxx | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | xxx xxxxxx xxxxxxxx xxxx | | Pass/Fail | | | | | | | | | | | | | | | | |

Chapter 10: Requirements Traceability Matrix

| Requirements Traceability Matrix | | | | | | | | | | | | | |
|----------------------------------|-----------------------------|---------------------------|---------------------------|-------------------------------|-----------------|---------|----------|----------------|-----------------|----------------------|-----------|-----------------------|-------------|
| BRD Requirement Id | BRD Requirement Description | Conceptual Diagram Name | Process Flow Name | Solution Design Document Name | Functional Area | FDD Id | DDD Name | Test Script Id | Test Case Id | Test Script Variants | User Type | Test Case Description | Status |
| RQ_ID001 | Account Management | None | Account Flow | Release1_Track01 | Accounts | FDD_001 | DDD_001 | Script-101 | TST_001/TST_002 | 2 | 3 | TC Description_001 | Pass |
| | | | | | | FDD_002 | DDD_002 | Script-102 | TST_003/TST_005 | 2 | 3 | TC Description_002 | Pass |
| | | | | | | FDD_003 | DDD_003 | Script-103 | TST_006/TST_008 | 1 | 3 | TC Description_003 | Pass |
| RQ_ID002 | Contact management | None | None | Release1_Track01 | Contacts | FDD_004 | DDD_004 | Script-104 | TST_00x/TST_00y | 2 | 2 | TC Description_004 | Pass |
| | | | | | | FDD_005 | DDD_005 | Script-105 | TST_00x/TST_00y | 3 | 2 | TC Description_005 | Fail |
| | | | | | | FDD_006 | DDD_006 | Script-106 | TST_00x/TST_00y | 1 | 2 | TC Description_006 | Pass |
| RQ_ID003 | Case management | None | Case Flow | Release1_Track01 | Cases | FDD_007 | DDD_007 | Script-107 | TST_00x/TST_00y | 5 | 3 | TC Description_007 | Fail |
| | | | | | | FDD_008 | DDD_008 | Script-108 | TST_00x/TST_00y | 4 | 3 | TC Description_008 | Pass |
| | | | | | | FDD_009 | DDD_009 | Script-109 | TST_00x/TST_00y | 2 | 3 | TC Description_009 | Pass |
| RQ_ID004 | Opportunity Management | Opportunity diagram | Opportunity Flow | Release1_Track02 | Opportunities | FDD_010 | DDD_010 | Script-110 | TST_00x/TST_00y | 2 | 3 | TC Description_010 | Pass |
| | | | | | | FDD_011 | DDD_011 | Script-111 | TST_00x/TST_00y | 2 | 3 | TC Description_011 | Pass |
| | | | | | | FDD_012 | DDD_012 | Script-112 | TST_00x/TST_00y | 3 | 1 | TC Description_012 | Pass |
| RQ_ID005 | Quote Management | None | Quote/Quote Approval flow | Release1_Track02 | Quotes | FDD_013 | DDD_013 | Script-113 | TST_00x/TST_00y | 3 | 1 | TC Description_013 | Pass |
| | | | | | | FDD_014 | DDD_014 | Script-114 | TST_00x/TST_00y | 2 | 2 | TC Description_014 | Pass |
| | | | | | | FDD_015 | DDD_015 | Script-115 | TST_00x/TST_00y | 1 | 2 | TC Description_015 | Pass |
| RQ_ID006 | Quote Approval Rule Matrix | None | Quote/Quote Approval flow | Release1_Track02 | Quotes | FDD_016 | DDD_016 | Script-116 | TST_00x/TST_00y | 1 | 1 | TC Description_016 | Pass |
| | | | | | | FDD_017 | DDD_017 | Script-117 | TST_00x/TST_00y | 3 | 2 | TC Description_017 | In Progress |
| | | | | | | FDD_018 | DDD_018 | Script-118 | TST_00x/TST_00y | 3 | 2 | TC Description_018 | No Run |
| RQ_ID007 | Product Alignment | Product Alignment diagram | None | Release1_Track03 | Products | FDD_019 | DDD_019 | Script-119 | TST_00x/TST_00y | 5 | 3 | TC Description_019 | No Run |

| Requirements Traceability Chart | | | | | | | | | | | | | |
|---------------------------------|------------|----------|------------|---------------|--------|-------------------------|----------|----------|----------|----------|----------|----------|----------|
| Test Script Coverage | | | | Test Coverage | | Business Requirement ID | | | | | | | |
| Test Script ID | Complexity | Variants | User Types | Required | Actual | RQ_ID001 | RQ_ID002 | RQ_ID003 | RQ_ID004 | RQ_ID005 | RQ_ID006 | RQ_ID007 | RQ_ID008 |
| Script-101 | H | 5 | 3 | 15 | 15 | | | | | | | | |
| Script-102 | H | 6 | 2 | 12 | 10 | | | | | | | | |
| Script-103 | M | 9 | 3 | 27 | 21 | | | | | | | | |
| Script-104 | M | 6 | 3 | 18 | 18 | | | | | | | | |
| Script-105 | H | 6 | 1 | 6 | 6 | | | | | | | | |
| Script-106 | L | 4 | 3 | 12 | 12 | | | | | | | | |
| Script-107 | M | 6 | 2 | 12 | 12 | | | | | | | | |

Chapter 11: User Acceptance Testing

| Account Planning | | | |
|------------------------------|---------------------------|--------------|-----------------------------|
| ACCOUNT INFO | CONTACT INFO | PRODUCT INFO | QTR/YRLY GOALS |
| Account Name * | XXXXX XXX | | Industry * XXXXXXXXXXXXXXXX |
| Account Owner * | XXXXXXXXXX | | Sub-Industry XXXXX |
| Street Address | NNNN XXXXXXXX XX XXXXXXXX | | Region XXXXXXXX |
| City | XXX XXXX | | Segmentation XXXXX |
| State | XX | | TIN # * ***** |
| Country | XXX | | |
| Zip | NNNNN | | |
| * - Indicates required field | | | |
| | | | NEXT |

| Account Planning | | | |
|------------------------------|---------------------------|--------------|-------------------------------------|
| ACCOUNT INFO | CONTACT INFO | PRODUCT INFO | QTR/YRLY GOALS |
| Contact Name * | XXXXX XXXXXXXXXXXXXXXX | | Phone # * NNN-NN-NNNN |
| Title | XXXXXXXX | | Email ID * XXXXXXXXXXXXXXXXXXXXXXXX |
| Street Address | NNNN XXXXXXXX XX XXXXXXXX | | DOB NN-NN-NNNN |
| City | XXX XXXX | | SSN # ***** |
| State | XX | | |
| Country | XXX | | |
| Zip | NNNNN | | |
| * - Indicates required field | | | |
| BACK | | NEXT | |

| Account Planning | | | | |
|------------------------------|--------------|--------------|----------------|----------|
| ACCOUNT INFO | CONTACT INFO | PRODUCT INFO | QTR/YRLY GOALS | |
| Product XXXXX * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX | XXXXXXXX | | XXXXXX | |
| XXXXXX | XXXXXXXX | | XXXXXX | |
| XXXXXX | XXXXXXXX | | XXXXXX | |
| * - Indicates required field | | | | |
| BACK | | | NEXT | |

| Account Planning | | | | |
|------------------------------|--------------|--------------|----------------|----------|
| ACCOUNT INFO | CONTACT INFO | PRODUCT INFO | QTR/YRLY GOALS | |
| GOALS * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX | XXXXXXXX |
| * - Indicates required field | | | | |
| BACK | | CANCEL | SAVE | |

Can user toggle from one tab to another?

Account Planning

PRINT

EMAIL

| ACCOUNT INFO | CONTACT INFO | PRODUCT INFO | QTR/YRLY GOALS |
|--------------|--------------|--------------|----------------|
| GOALS * | XXXXXXXX | | XXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX |
| XXXXXX * | XXXXXXXX | | XXXXXX |

PRINT & EMAIL features as buttons for easier

Can user save incomplete version?

BACK

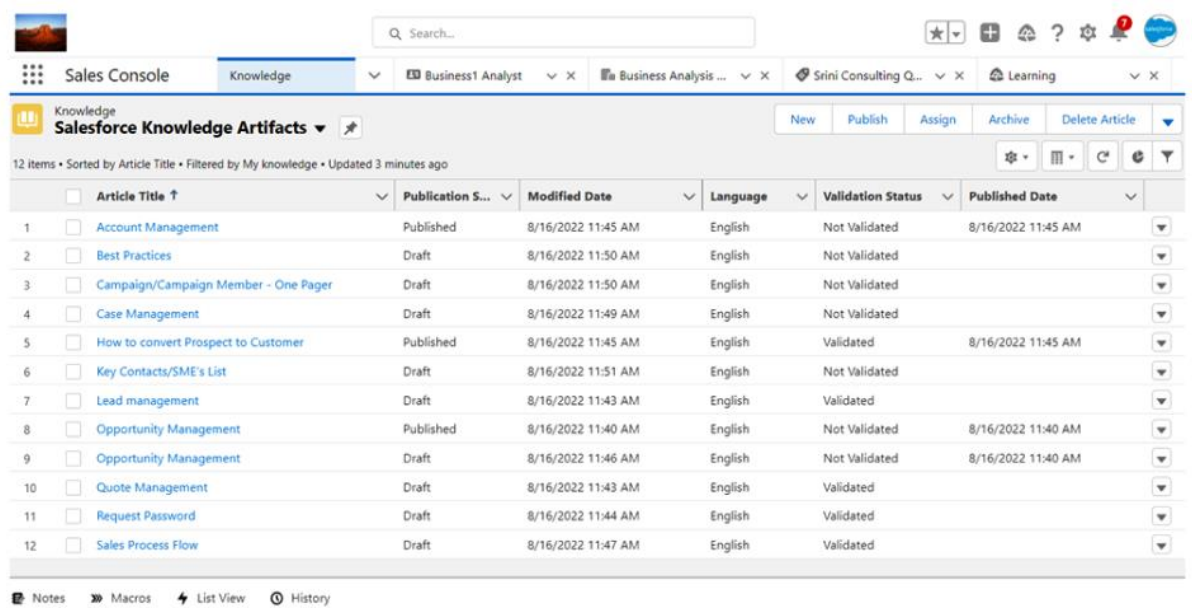
CANCEL

SUBMIT

SAVE DRAFT

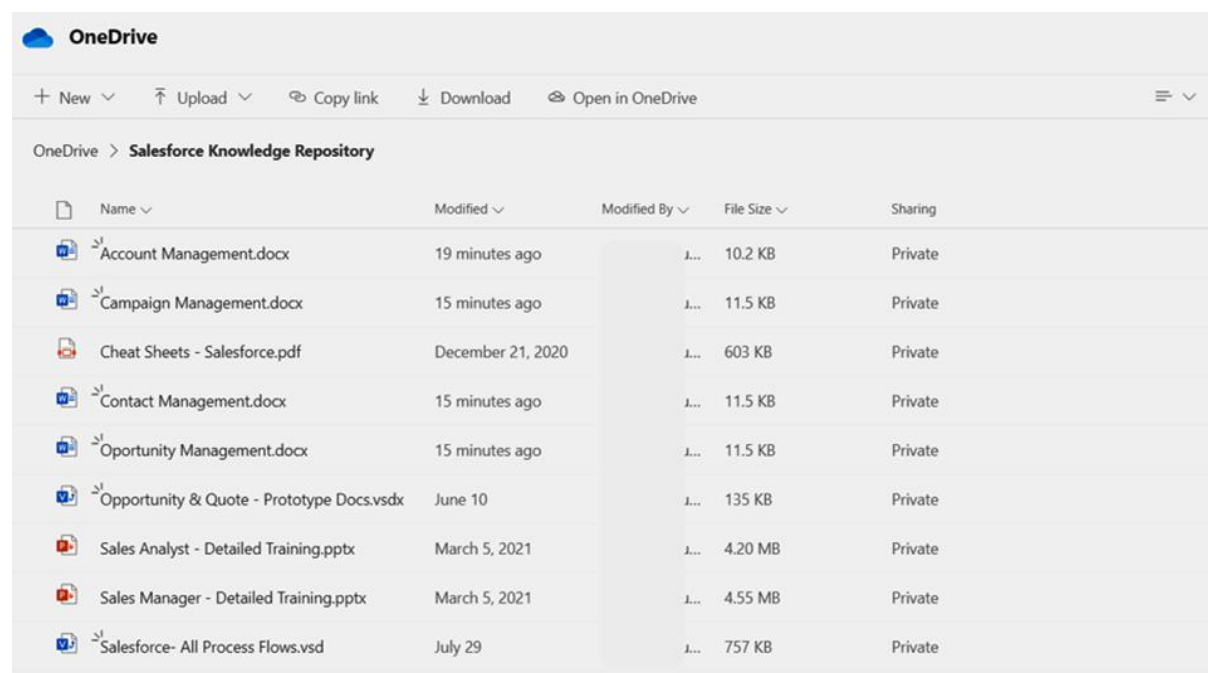
* - Indicates required field

Chapter 12: Communication and Knowledge Management



The screenshot shows the Salesforce Knowledge console interface. At the top, there's a search bar and navigation tabs for 'Sales Console', 'Knowledge', and other tabs. Below the navigation, there's a header for 'Salesforce Knowledge Artifacts' with buttons for 'New', 'Publish', 'Assign', 'Archive', and 'Delete Article'. A summary line indicates '12 items • Sorted by Article Title • Filtered by My knowledge • Updated 3 minutes ago'. The main content is a table with columns: Article Title, Publication Status, Modified Date, Language, Validation Status, and Published Date. The table lists 12 items, including 'Account Management', 'Best Practices', 'Campaign/Campaign Member - One Pager', 'Case Management', 'How to convert Prospect to Customer', 'Key Contacts/SME's List', 'Lead management', 'Opportunity Management', 'Quote Management', 'Request Password', and 'Sales Process Flow'. At the bottom, there are tabs for 'Notes', 'Macros', 'List View', and 'History'.

| | Article Title ↑ | Publication S... | Modified Date | Language | Validation Status | Published Date |
|----|--|------------------|--------------------|----------|-------------------|--------------------|
| 1 | Account Management | Published | 8/16/2022 11:45 AM | English | Not Validated | 8/16/2022 11:45 AM |
| 2 | Best Practices | Draft | 8/16/2022 11:50 AM | English | Not Validated | |
| 3 | Campaign/Campaign Member - One Pager | Draft | 8/16/2022 11:50 AM | English | Not Validated | |
| 4 | Case Management | Draft | 8/16/2022 11:49 AM | English | Not Validated | |
| 5 | How to convert Prospect to Customer | Published | 8/16/2022 11:45 AM | English | Validated | 8/16/2022 11:45 AM |
| 6 | Key Contacts/SME's List | Draft | 8/16/2022 11:51 AM | English | Not Validated | |
| 7 | Lead management | Draft | 8/16/2022 11:43 AM | English | Validated | |
| 8 | Opportunity Management | Published | 8/16/2022 11:40 AM | English | Not Validated | 8/16/2022 11:40 AM |
| 9 | Opportunity Management | Draft | 8/16/2022 11:46 AM | English | Not Validated | 8/16/2022 11:40 AM |
| 10 | Quote Management | Draft | 8/16/2022 11:43 AM | English | Validated | |
| 11 | Request Password | Draft | 8/16/2022 11:44 AM | English | Validated | |
| 12 | Sales Process Flow | Draft | 8/16/2022 11:47 AM | English | Validated | |



The screenshot shows the OneDrive interface. At the top, there's a header with the OneDrive logo and navigation options: '+ New', 'Upload', 'Copy link', 'Download', and 'Open in OneDrive'. Below the header, there's a breadcrumb trail: 'OneDrive > Salesforce Knowledge Repository'. The main content is a table with columns: Name, Modified, Modified By, File Size, and Sharing. The table lists 8 files, including 'Account Management.docx', 'Campaign Management.docx', 'Cheat Sheets - Salesforce.pdf', 'Contact Management.docx', 'Opportunity Management.docx', 'Opportunity & Quote - Prototype Docs.vsd', 'Sales Analyst - Detailed Training.pptx', and 'Sales Manager - Detailed Training.pptx'. At the bottom, there's a file named 'Salesforce- All Process Flows.vsd'.

| Name | Modified | Modified By | File Size | Sharing |
|--|-------------------|-------------|-----------|---------|
| Account Management.docx | 19 minutes ago | J... | 10.2 KB | Private |
| Campaign Management.docx | 15 minutes ago | J... | 11.5 KB | Private |
| Cheat Sheets - Salesforce.pdf | December 21, 2020 | J... | 603 KB | Private |
| Contact Management.docx | 15 minutes ago | J... | 11.5 KB | Private |
| Opportunity Management.docx | 15 minutes ago | J... | 11.5 KB | Private |
| Opportunity & Quote - Prototype Docs.vsd | June 10 | J... | 135 KB | Private |
| Sales Analyst - Detailed Training.pptx | March 5, 2021 | J... | 4.20 MB | Private |
| Sales Manager - Detailed Training.pptx | March 5, 2021 | J... | 4.55 MB | Private |
| Salesforce- All Process Flows.vsd | July 29 | J... | 757 KB | Private |

Chapter 13: End User Training

| Session ID | User Groups | Duration | Countries | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY | MM/DD/YY |
|------------|----------------------------|----------|-----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| CRM - 01 | Sales Analyst- Session 1 | 2 Hrs | Asia | | | | | | | | | | | | | |
| CRM - 02 | Sales Analyst- Session 2 | 2 Hrs | Asia | | | | | | | | | | | | | |
| CRM - 03 | Service Analyst- Session 1 | 2 Hrs | Asia | | | | | | | | | | | | | |
| CRM - 04 | Service Analyst- Session 2 | 2 Hrs | Asia | | | | | | | | | | | | | |
| CRM - 05 | Sales Manager | 2 Hrs | Asia | | | | | | | | | | | | | |
| CRM - 06 | Service Managers | 2 Hrs | Asia | | | | | | | | | | | | | |
| CRM - 07 | Planning Division | 2 Hrs | Asia | | | | | | | | | | | | | |
| CRM - 08 | Marketing | 90 Mins | Asia | | | | | | | | | | | | | |
| CRM - 09 | Legal/Compliance | 90 Mins | Asia | | | | | | | | | | | | | |
| CRM - 10 | Production Support | 90 Mins | Asia | | | | | | | | | | | | | |
| CRM - 11 | Sales Analyst- Session 1 | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 12 | Sales Analyst- Session 2 | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 13 | Sales Analyst- Session 3 | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 14 | Service Analyst- Session 1 | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 15 | Service Analyst- Session 2 | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 16 | Service Analyst- Session 3 | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 17 | Sales Manager | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 18 | Service Managers | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 19 | Planning Division | 2 Hrs | Americas | | | | | | | | | | | | | |
| CRM - 20 | Marketing | 90 Mins | Americas | | | | | | | | | | | | | |
| CRM - 21 | Legal/Compliance | 90 Mins | Americas | | | | | | | | | | | | | |
| CRM - 22 | Production Support | 90 Mins | Americas | | | | | | | | | | | | | |

| Americas - Training Sessions | | | | | | | | | | | | |
|------------------------------|----------------------------|----------|-----------|-------------|-----------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Session ID | User Groups | Duration | Countries | Facilitator | Attendees | Time Schedule | | | | | | |
| | | | | | | US | Canada | Mexico | Brazil | Chile | Paraguay | |
| CRM - 11 | Sales Analyst- Session 1 | 2 Hrs | Americas | ***** | 30 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 12 | Sales Analyst- Session 2 | 2 Hrs | Americas | ***** | 30 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 13 | Sales Analyst- Session 3 | 2 Hrs | Americas | ***** | 25 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 14 | Service Analyst- Session 1 | 2 Hrs | Americas | ***** | 30 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 15 | Service Analyst- Session 2 | 2 Hrs | Americas | ***** | 30 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 16 | Service Analyst- Session 3 | 2 Hrs | Americas | ***** | 10 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 17 | Sales Manager | 2 Hrs | Americas | ***** | 20 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 18 | Service Managers | 2 Hrs | Americas | ***** | 10 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 19 | Planning Division | 2 Hrs | Americas | ***** | 5 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 20 | Marketing | 90 Mins | Americas | ***** | 15 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 21 | Legal/Compliance | 90 Mins | Americas | ***** | 12 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 22 | Production Support | 90 Mins | Americas | ***** | 6 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |

| Asia - Training Sessions | | | | | | | | | | | | |
|--------------------------|----------------------------|----------|-----------|-------------|-----------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Session ID | User Groups | Duration | Countries | Facilitator | Attendees | Time Schedule | | | | | | |
| | | | | | | US | Japan | Singapore | India | Philippines | Vietnam | |
| CRM - 01 | Sales Analyst- Session 1 | 2 Hrs | Asia | xxxxxxxx | 60 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 02 | Sales Analyst- Session 2 | 2 Hrs | Asia | xxxxxxxx | 60 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 03 | Service Analyst- Session 1 | 2 Hrs | Asia | xxxxxxxx | 50 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 04 | Service Analyst- Session 2 | 2 Hrs | Asia | xxxxxxxx | 50 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 05 | Sales Manager | 2 Hrs | Asia | xxxxxxxx | 10 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 06 | Service Managers | 2 Hrs | Asia | xxxxxxxx | 6 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 07 | Planning Division | 2 Hrs | Asia | xxxxxxxx | 5 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 08 | Marketing | 90 Mins | Asia | xxxxxxxx | 12 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 09 | Legal/Compliance | 90 Mins | Asia | xxxxxxxx | 10 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |
| CRM - 10 | Production Support | 90 Mins | Asia | xxxxxxxx | 6 | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM | DD-MMM HH-MM AM |

| Session Topics/Agenda | User Role | | | | | | | |
|--|---------------|-----------------|---------------|------------------|-------------------|-----------|------------------|--------------------|
| | Sales Analyst | Service Analyst | Sales Manager | Service Managers | Planning Division | Marketing | Legal/Compliance | Production Support |
| General Navigation | | | | | | | | |
| * Apps, Tabs, List View Controls and so on | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Lead Management | | | | | | | | |
| * Lead Functionality | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Integrations with Marketing tools | | | | | | | | |
| Campaign Management | | | | | | | | |
| * Campaign Functionality | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Integration to third party apps | | | | | | | | |
| Account Management | | | | | | | | |
| * Account Functionality | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Integration with data enrichment tools | | | | | | | | |
| Contact Management | | | | | | | | |
| * Contact Functionality | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Integration with data enrichment tools | | | | | | | | |
| Event Management | | | | | | | | |
| * Customer Interactions | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Opportunity Management | | | | | | | | |
| * Opportunity Functionality | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Opportunity Integrations | | | | | | | | |
| Quote Management | | | | | | | | |
| * Quote Functionality | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Quote Approval Flow | | | | | | | | |
| Reports/Analytics | | | | | | | | |
| * Salesforce Reports/Dashboards | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Other Analytic tools | | | | | | | | |
| Case Management | | | | | | | | |
| * Case Functionality | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| * Case Approvals | | | | | | | | |

Chapter 14: Post Go-Live Support / User Forums

