



Scoping Document Example

As you read through the Customization Checklist and Scoping document, refer to this example, while preparing your own documents to submit.

1. Identify your customization mission, goal and constraints

Mission – To have an efficient reporting CRM solution, that respects Users’ permissions based on Roles.

Goals – Our goals are as follows:

- i. Provide Product Specialist (PS) with up-to-date sales data per customer.
- ii. Filter the Customer List by PS logged in.
- iii. If PS logged in is not the assigned Rep for a Customer, the Payment and Job Info tab section should be hidden on the Customer List screen.
- iv. Minimize work load on Product Executive (PE) by making the system more interactive for PS.
- v. PE can analyze business trends and focus on increasing productivity.

Budget – Our budget range allocated for the customization is \$4,000 - \$5,000.

Timeline– Our aim is to have the system up and running by October 1st.

2. Requirements – (Must haves)

- a. Filter the Customer List by PS logged in.
- b. Show a report, displaying the purchase history by Customer within a specified date range. The report should be displayed under a new Tab Section ‘Sales Stats’ in the Customer List screen.

3. Current Workflow Process

The PE checks Microsoft Outlook for emails received from new leads. If they receive an email from a lead, they enter it as a Customer in QuickBooks with the Customer Type “Lead”. The PE then assigns a PS to that Lead in QuickBooks. They decide which PS will get the next Lead based on the number of Customers they are assigned to. The PS is able to see other PSs Customers, which is a pain point for us.

The PS then contacts the Lead and tries to sell them relevant products based on their interests. If the PS is able to close the sale, they create an Invoice in QuickBooks. This is another pain point, since they are able to see all Invoices for Customers / Leads in QuickBooks that belong to other PSs. They then update the Notes section in QuickBooks with details from the phone conversation. Finally, they schedule a follow up for 1 month later in their Microsoft Outlook calendar to wrap up the process.

If they were unable to close the sale, they would skip the entering Invoice step in QuickBooks and proceed to updating the Notes section in QuickBooks and entering a follow up in Outlook for a month later in their Microsoft Outlook calendar.

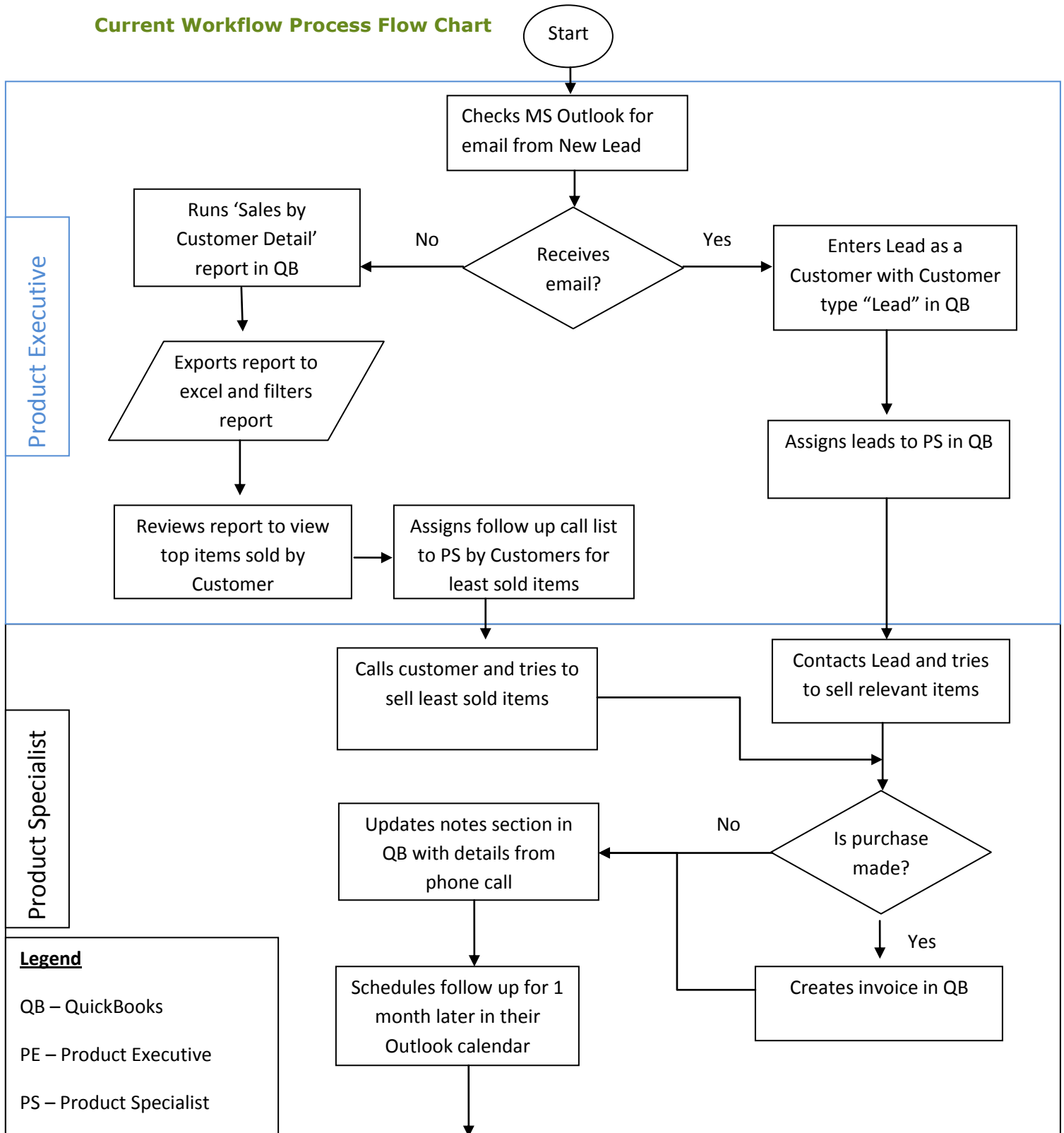
On the other hand, if the PE doesn't receive any email from Leads, he logs into QuickBooks and runs a 'Sales by Customer Detail' report for existing Customers. They export the report to Microsoft Excel and filter it to show relevant information for their own analysis and for PS to make follow up calls. The PE formats the data and removes any customers that do not belong to that specific PS, as well as any columns that are not needed. The PE reviews the report to view top items sold by Customer for their own trend analysis. They then assign a follow up call list to the PS by Customer, indicating the least items sold.

The PS contacts the Customers and tries to sell the least items sold by Customer. If the PS is able to close the sale, they create an invoice in QuickBooks. They then update the Notes section in QuickBooks with details from the phone conversation. Lastly, they schedule a follow up for 1 month later in their Microsoft Outlook Calendar.

If they were unable to close the sale, they would skip the entering Invoice step in QuickBooks and proceed to updating the Notes section in QuickBooks and entering a follow up in Outlook for a month later.

A system flow chart, representing the current work flow process as outlined above, is shown on the next page.

Current Workflow Process Flow Chart



End

Screenshots of Current Workflow Process

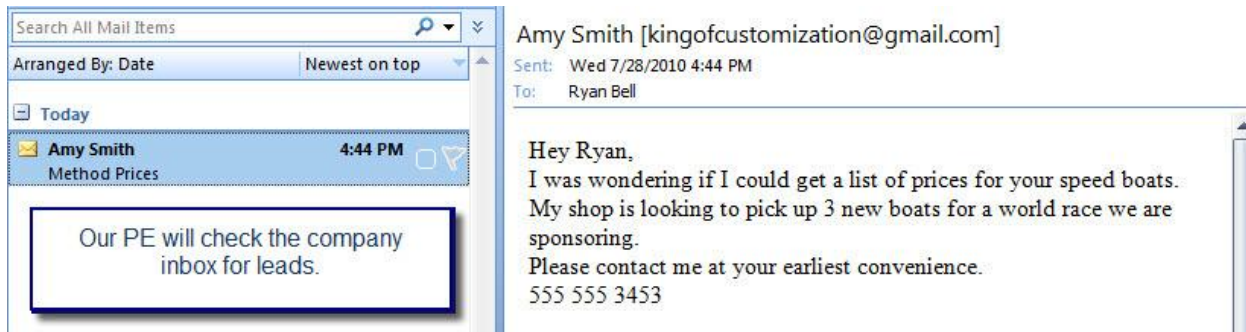


Fig 1.0 – Our process starts off in Microsoft Outlook; this is where the PE will be receiving emails from Leads. The leads are manually entered into QB by the PE.

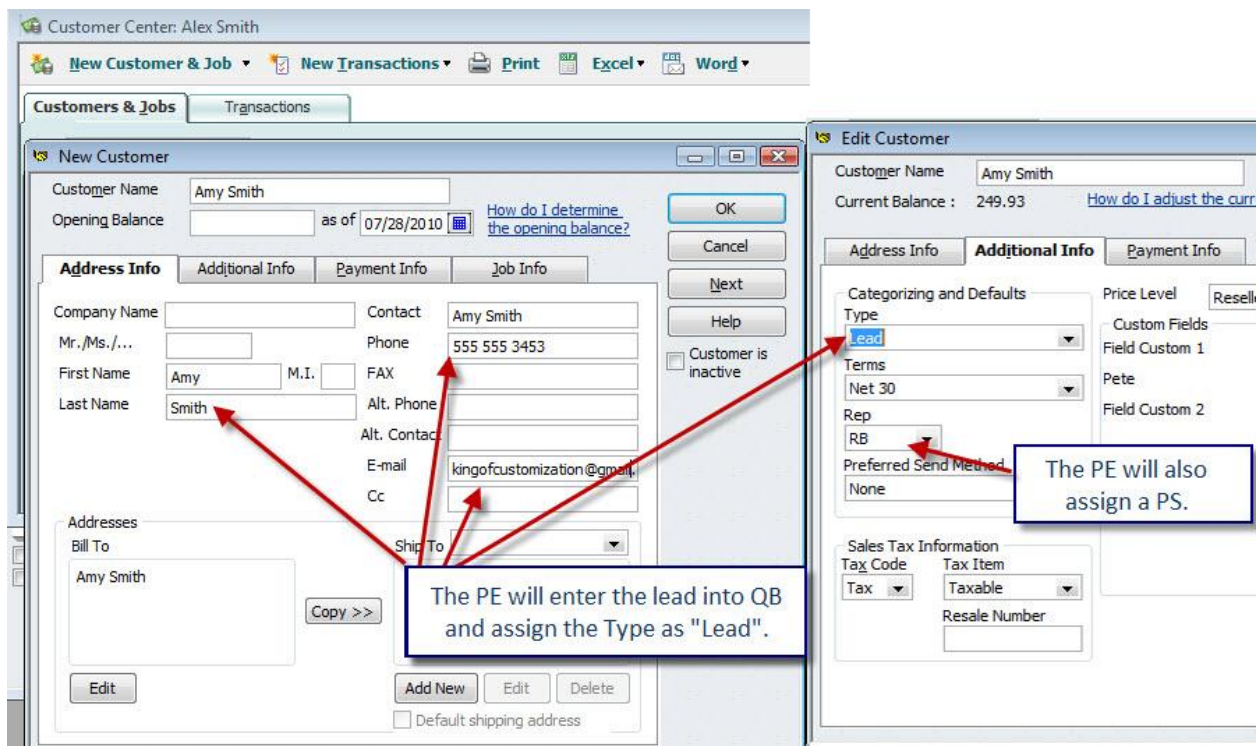


Fig 1.1 – This picture is showing how our PE manually enters in Leads from Outlook. This information is copied/pasted right into QuickBooks. The PE uses the "Type" dropdown to mark the clients as "Lead". This is also where the PE will assign a PS to the lead.

Customer Name: Amy Smith
 Current Balance : 249.93 [How do I adjust the current balance?](#)

OK
 Cancel
 Notes
 Help
☐ Customer is inactive

Address Info Additional Info Payment Info

Company Name: Contact: Amy Smith

Mr./Ms./...: Phone:

First Name: Amy M.I.: FAX:

Last Name: Smith Alt. Phone: 555 555 3453

Alt. Contact:

E-mail: kingofcustomization@gm...
 Cc:

Addresses

Bill To: Ship To: Ship To 1

☒ Default shipping address

Using this information, the PS will contact the lead and try to make a sale.

Fig 1.2 – The PS uses the Customer List screen to get detailed customer information. At this point the PS will contact the Lead and try to make a sale.

Create Invoices

Previous Next Print Send Ship Find Spelling History Journal

Customer: Job [Reseller 30] Class Labor

Amy Smith

Template Print Preview

Intuit Product Invoice

Date 02/03/2010 Invoice # 659

Ship To Ship To 1

Method SUTTON KESWICK Amy Smith 55 George St.

P.O. Number Terms 2% 10 Net... Rep IQ Ship 02/03/2010

Quantity Item Code Description U/M

1	AR BID	BID PACKAGES	
1	AR CB	CONFERENCE WITH CONTRACTOR	
1	AR BD	BUILDING DEPARTMENT LIAISON	

< Add New >

AH	Amy Hazel	Employee
✓ IQ	Ibi Q.	Other Name
JM	Jenny Miller	Employee
PRU	Pluming R Us	Vendor
SDY	Bobby Sandy	Employee

Customer Message

Tax (Taxable) (7.0%) 120.05

Total 1,835.05

To be printed To be e-mailed

Add Time/Costs... Apply Credits... Payments Applied 0.00

Customer Tax Code Tax Balance Due 1,835.05

Memo

Learn about our payment processing and online invoicing solutions.

Save & Close Save & New Revert

One problem we face is that PSs are able to see every invoice. We want to change this in our new process.

This list of Reps should be read only in Method.

If a sale is made, an invoice is entered into QB by the PS.

Fig 1.3 – The PS creates an Invoice if they are able to make a sale; this is done directly in QB. We would like to limit access so that PSs are not able to browse all Invoices, but only ones they enter.

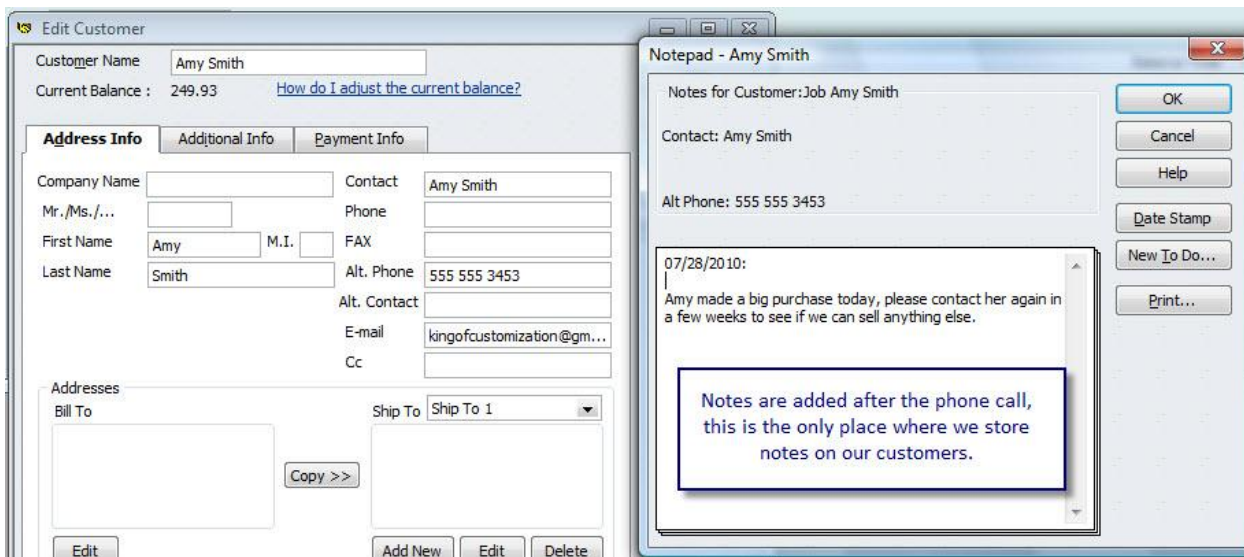


Fig 1.4 – Our PSs enter notes right into QB each time they call a client. This is the only place we currently keep notes for clients.

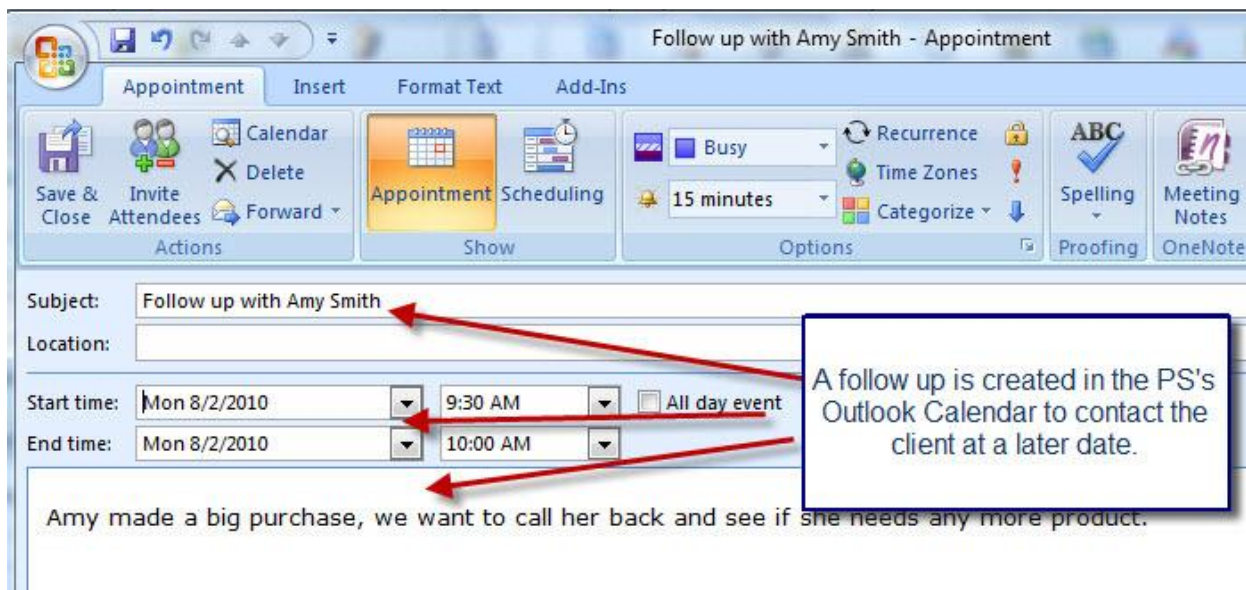


Fig 1.5 – A follow up is then posted into Outlook as a reminder to contact this client.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
				Type	Date		Num				Memo		Name		Item	Qty	U/M		Sales Price		Amount		Balance		
2		Alex Smith																							
3				Invoice	07/06/2009		5432				ARCHITECTURAL DESIGN		Alex Smith		AR AD	1.00			100.00		100.00		100.00		
4				Invoice	07/06/2009		5432				CLASS/SEMINAR/EDUCATION		Alex Smith		AR CL	4.00			100.00		400.00		500.00		
5				Invoice	07/29/2009		27				BID PACKAGES		Alex Smith		AR BID	1.00			100.00		100.00		600.00		
6					07/29/2009		27				COMPUTER AIDED DRAFTING		Alex Smith		AR CAD	2.00			100.00		200.00		800.00		
7					08/04/2009		28				COMPUTER AIDED DRAFTING		Alex Smith		AR CAD	3.00			100.00		300.00		1,100.00		
8					08/04/2009		28				BUILDING DEPARTMENT LIAISON		Alex Smith		AR BD	3.00			100.00		300.00		1,400.00		
9					08/11/2009		29				CONFERENCE WITH CONTRACTOR		Alex Smith		AR CB	40.00			100.00		4,000.00		5,400.00		
10				Invoice	08/19/2009		30				BID PACKAGES		Alex Smith		AR BD	10.00			100.00		1,000.00		6,400.00		
11				Invoice	08/19/2009		30				CONSTRUCTION INSPECTION		Alex Smith		AR CI	2.00			100.00		200.00		6,600.00		
12				Invoice	08/20/2009		31				BID PACKAGES		Alex Smith		AR BID	4.00			100.00		400.00		7,000.00		
13				Invoice	08/20/2009		31				CONSTRUCTION INSPECTION		Alex Smith		AR CI	2.00			100.00		200.00		7,200.00		
14				Invoice	08/21/2009		32				COMPUTER AIDED DRAFTING		Alex Smith		AR CAD	5.00			100.00		500.00		7,700.00		
15				Invoice	08/21/2009		32				CONFERENCE WITH CONTRACTOR		Alex Smith		AR CB	6.00			90.00		540.00		8,240.00		
16				Invoice	08/28/2009		33				BUILDING DEPARTMENT LIAISON		Alex Smith		AR BD	43.00			100.00		4,300.00		12,540.00		
17				Invoice	08/28/2009		33				CONFERENCE		Alex Smith		AR CO	3.00			100.00		300.00		12,840.00		
18				Invoice	09/15/2009		34				ARCHITECTURAL DESIGN		Alex Smith		AR AD	4.00			100.00		400.00		13,240.00		
19				Invoice	09/15/2009		34				CONSTRUCTION INSPECTION		Alex Smith		AR CI	4.00			100.00		400.00		13,640.00		
20				Invoice	09/15/2009		34				30 % off the final price		Alex Smith		Customer Discount				-30.0%		-240.00		13,400.00		
21				Invoice	10/01/2009		35						Alex Smith		Magenta	1.00	ea		175.00		175.00		13,575.00		
22				Invoice	10/01/2009		35						Alex Smith		Salt (bag)	1.00			7.00		7.00		13,582.00		
23				Invoice	10/01/2009		35				Buy/Sell/Record Fish in 3 ways		Alex Smith		Halibut	1.00	lb		8.40		8.40		13,590.40		
24				Invoice	10/02/2009		36				Logitech Wireless Keyboard		Alex Smith		Logitech Wireless Keyboard	60.00	ea		99.99		5,999.40		19,589.80		
25				Invoice	10/02/2009		37				Logitech Wireless Keyboard		Alex Smith		Logitech Wireless Keyboard	34.00	ea		99.99		3,399.66		22,989.46		
26				Credit Memo	10/21/2009		988				Right Handed Hockey Sticks		Alex Smith		Hockey Sticks Right Handed	-2.00	ea		89.99		-179.98		22,809.48		
27				Invoice	10/26/2009		38						Alex Smith		Bike	1.00	ea		299.00		299.00		23,108.48		
28				Invoice	10/26/2009		39				Logitech Wireless Keyboard		Alex Smith		Logitech Wireless Keyboard	5.00	ea		99.99		499.95		23,608.43		
29				Invoice	10/27/2009		40				Right Handed Hockey Sticks		Alex Smith		Hockey Sticks Right Handed	4.00	ea		89.99		359.96		23,968.39		
30				Invoice	10/27/2009		40				Buy/Sell/Record Fish in 3 ways		Alex Smith		Halibut	4.00	lb		12.00		48.00		24,016.39		
31				Invoice	11/03/2009		41				ARCHITECTURAL DESIGN		Alex Smith		AR AD	2.00			100.00		200.00		24,216.39		
32				Invoice	11/03/2009		42				Buy/Sell/Record Fish in 3 ways		Alex Smith		Halibut	10.00	lb		12.00		120.00		24,336.39		
33				Invoice	11/06/2009		43				hello		Alex Smith		Salt (bag)	12.00			10.00		120.00		24,456.39		
34				Invoice	01/27/2010		44				Buy/Sell/Record Fish in 3 ways		Alex Smith		Halibut	2.00	lb		12.00		24.00		24,480.39		

Fig 1.8 – This is what the report looks like in Excel before it is edited, I have highlighted the fields that are kept when formatting the report.

	A	B	C	D	E	F	G
1	Alex Smith		Item	Qty	Sales Price	Amount	
2			Logitech Wireless Keyboard	69.00	99.99	6,899.31	
3			AR BD	46.00	100.00	4,600.00	
4			AR CB	40.00	100.00	4,000.00	
5			AR BID	18.00	100.00	1,800.00	
6			Halibut	18.00	8.40	151.20	
7			Salt (bag)	13.00	7.00	91.00	
8			AR CAD	10.00	100.00	1,000.00	
9			AR CI	8.00	100.00	800.00	
10			AR AD	7.00	100.00	700.00	
11			AR CB	6.00	90.00	540.00	
12			AR CL	4.00	100.00	400.00	
13			Hockey Sticks Right Handed	4.00	89.99	359.96	
14			AR CO	3.00	100.00	300.00	
15			Magenta	1.00	175.00	175.00	
16			Bike	1.00	299.00	299.00	
17			The PE will format the report to show the items sold to this customer.				
18							
19							
20							
21							
22							
23							

Fig 1.9 – This is what the final document looks like when the PE is done formatting it. You can see what Items were purchased, as well as how many of those items were sold.

4. Desired Workflow Process

The PS logs into Microsoft Outlook and checks their email for new Leads. If a new Lead comes in, using the Microsoft Outlook Plug-In (MOPI); the PS will add the Lead as an Opportunity in Method. As emails are received from Leads, the PS should be able to add these prospects as Leads and any communication made with them. This will replace our old process of assigning leads manually, as well as keeping our Leads out of QuickBooks, until they are ready to become an actual customer.

The PS then contacts the Leads and tries to sell them relevant products based on their interest. If the PS is able to close the sale, they will then create an invoice in Method. Entering the invoice through Method will prevent them from seeing invoices belonging to other PSs and eliminate them from logging into QuickBooks. This will be done by filtering the existing invoices by PS. The "Sales Rep" field on the Invoice screen should be read-only, so the PS cannot change the assigned Rep, and it should default to the PS logged in. They should then enter the phone conversation as an activity in Method and immediately schedule a follow up. If no sale is made, they will only enter the phone call and schedule a follow up as Activities in Method.

On the other hand, if no Lead comes in, the PS will review the 'Sales Stats' tab section within Method. We would like 'Sales Stats' to be a tab section on the Customer List screen, which generates a report showing items Customers have purchased, within a date range. Method will automatically filter each PS's screen so they will only have access to their own customers' information. This is going to eliminate the PE from having to manually print and hand out reports.

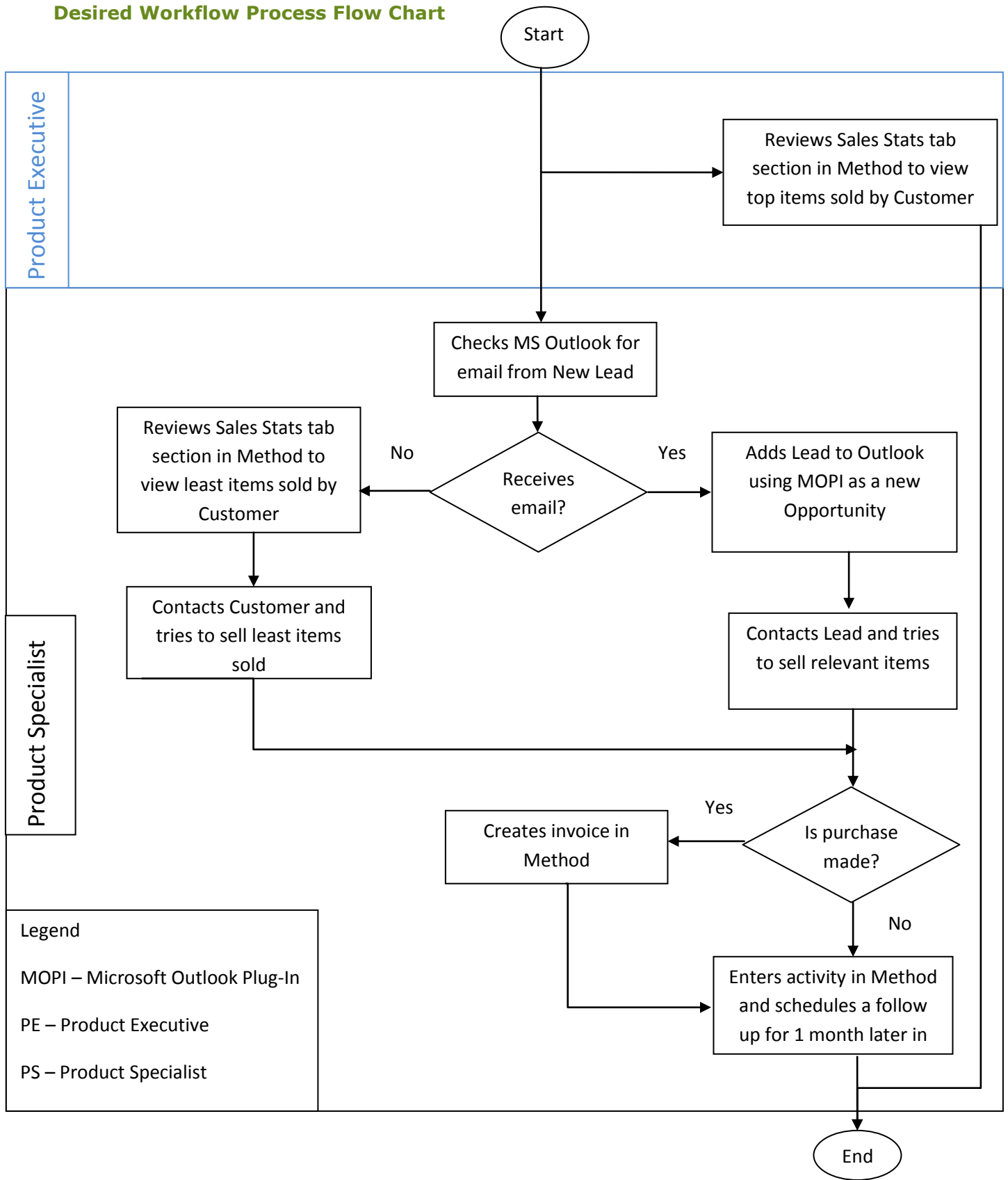
The PS will contact the Customers and try to sell least items sold by Customer. If the PS is able to close the sale, they create an Invoice in Method. After creating an Invoice, they will enter their phone call and schedule a follow up in Method using Activities. If no sale is made, then they will skip the creating the Invoice step, and only enter the phone conversation and follow up as Activities in Method.

The PEs' only involvement in the new process should be to log into the Method and view the 'Sales Stats' tab section under the Customer List screen. They need this for trend analysis.

It is important to customize the "ItemService" and "ItemInventory" screens by adding checkboxes. With these checkboxes, we can mark the items that will be included or excluded from the 'Sale Stats' report. This checkbox should be labeled "Include in Sales Report".

A system flow chart, representing the desired work flow process as outlined above, is shown on the next page.

Desired Workflow Process Flow Chart



Screenshots of Desired Workflow Process

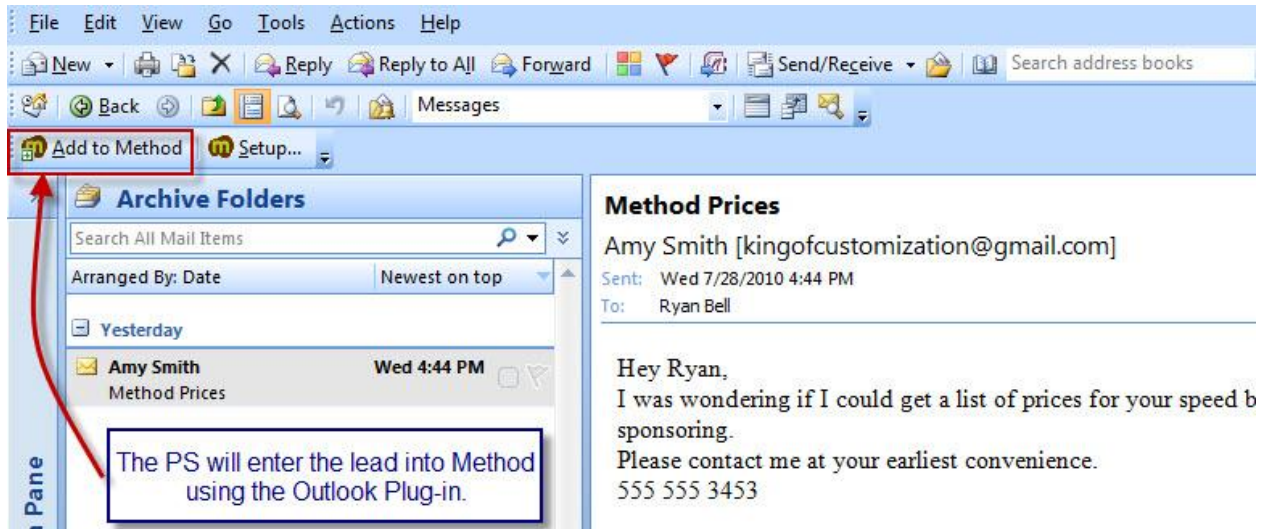


Fig 2.0 – The PS will check Outlook for Leads in the morning. Any Leads found will be added to Method using the Outlook Plug-in.

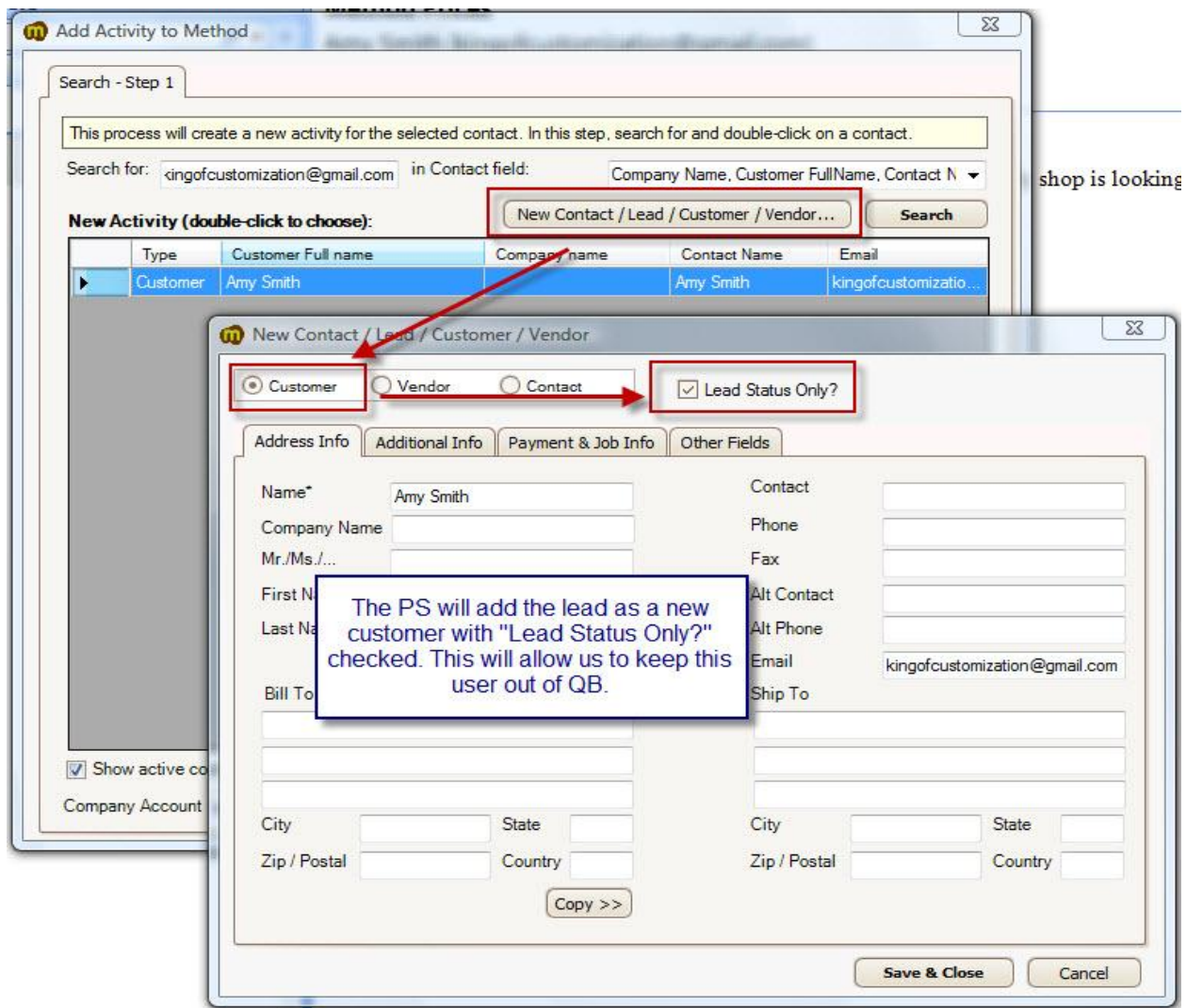


Fig 2.1 – The Lead is added using the Outlook Plug-in and is marked as a 'Lead', this will keep leads out of QB.

Add Activity to Method

Search - Step 1 | Search - Step 2 | **Opportunity** | Activity Details

Opportunity No.

Name*

Assigned To*

Contact Name

Contact Phone

Contact Email

Type

Campaign

Created By

Last Modified By

Close Date

Stage*

Probability Percent

Amount

Pipeline

Lead Source

Next Step

Description

[View in browser...](#)

The lead details are entered into the Opportunity section.

Spell Check

Fig 2.3 – This is where we will be entering our details for the Opportunity.

The screenshot shows the Method CRM interface in Internet Explorer. The browser address bar displays the URL: `http://www.methodintegration.com/method/Default.aspx?8&ScreenResolutionWidth=1280&ScreenResolutionHeight=800&Info=templat...`. The page title is "method™". The navigation bar includes tabs for Home, Customer Center, Vendor Center, Employee Center, Sales Center, Call Center, Customer Portal, Warehouse Center, Field Service Center, Mobile(1), QuickBooks, and Customize. The Customer Center tab is active, showing a sub-menu with Customer List, Invoices, Estimates, Credit Memos, Receive Payment, Statement Charges, Sales Orders, and Sales Receipts. The Customer List tab is selected, displaying a table of existing customers. The table has columns for Filter By View, Select, Customer, and Balance. The first two rows are highlighted in green. The first row is for Alex Smith with a balance of 15975.12. The second row is for Amy Smith with a balance of 249.93. The third row is for Amy Smith Entry 1 - Test sub of ... with a balance of 0.00. The fourth row is for Amy Smith:Fresh & Wild 01 with a balance of 0.00. The fifth row is for Amy Smith:Hello World - 1 with a balance of 0.00. The sixth row is for Amy Smith:Hello World - 1:Hello - with a balance of 0.00. The seventh row is for Amy Smith:Hello World - 1:Hello - with a balance of 0.00. The eighth row is for Amy Smith:Hello World - 1:Hello - with a balance of 0.00. The ninth row is for Amy Smith:Hello World - 1:Hello - with a balance of 0.00. The tenth row is for Amy Smith:Hello World - 1:Hello - with a balance of 0.00. The total balance for the first two rows is 16225.05. The table shows records 1 to 10 of 78. There are buttons for Advanced Search... and Refresh List. The Customer Detail tab is also visible, showing the details for Amy Smith. The details include Full Name, Customer Name, Company Name, Mr./Ms./..., First Name, Last Name, Bill To, City, State / Prov., Zip / Postal, Country, Contact, Phone, Fax, Alt Contact, Alt Phone, and Email. The Sales Stats tab is highlighted with a red box and an annotation: "Sales Stats tab will be located here." Another annotation points to the Customer List filter: "We would like the Customer List to only show clients for the PS that is logged in." A third annotation points to the Customer Detail form: "Using Method, the PS will contact the client and try to make a sale."

Fig 2.4 – The PS would be able to go into Method to review the Lead/Customer information. The Customer List on this screen should be filtered to only show Customers of the PS that is signed into Method. Also if this was a Customer and not a Lead, the PS would review the Sales Stats tab to see the sales history.

method™ Change Role: Admin [Sign Out](#)

Home Customer Center Vendor Center Employee Center Sales Center Call Center Customer Portal Warehouse Center Field Service Center Mobile(1) QuickBooks Customize

Customer List Invoices Estimates Credit Memos Receive Payment Statement Charges Sales Orders Sales Receipts

Existing Invoices

Filter By View: All Invoices

Select	Invoice #	Date	Customer:Job
<input type="checkbox"/>			
<input type="checkbox"/>	822	Jul-23-2010	Alex Smith
<input type="checkbox"/>	821	Jul-23-2010	Alex Smith
<input type="checkbox"/>	820	Jul-16-2010	Alex Smith
<input type="checkbox"/>	819	Jul-16-2010	Alex Smith

Print... Refresh

Add / Edit Invoice

Customer:Job Amy Smith Class Account Accounts Receivable Date Jul-29-2010 Invoice #

Bill To / Ship To Address... This Rep field should be read only.

Details

P.O. Number Terms Net 30 Due Date Aug-28-2010 Rep RB Via

Service Date	Item	Description	Quantity	Rate	%	Amount	Tax	Delete
Jul-29-2010	AR BP	BLUE PRINTING	1.00	100.00		100.00	Tax	Delete
	AR CAD	COMPUTER AIDED DRAFTING	1.00	100.00		100.00	Tax	Delete
	AR ES		1.00	0.00		0.00		Delete
Jul-29-2010	AR BP	BLUE PRINTING	1.00	100.00		100.00	Tax	Delete
	AR CAD	COMPUTER AIDED DRAFTING	1.00	100.00		100.00	Tax	Delete
	AR ES	COST ESTIMATION	1.00	100.00		100.00	Tax	Delete
						500.00		

New Line Item... Update Cancel

Customer Message It's been a pleasure working with you! Subtotal 500.00

Ship from Location Tax Item Taxable \$ 35.00

The Invoice List should only show invoices for the PS that is signed in.

Fig 2.5 – If the PS is able to make a sale, the Invoice will be filled out in Method. Also notice that the invoice list will be filtered to only show Invoices that have been entered by the PS that is signed into Method.

Sales Center Call Center Customer Portal Warehouse Center Field Service Center Mobile(1) QuickBooks Customize

Receive Payment Statement Charges Sales Orders Sales Receipts

Address Info Additional Info Payment & Job Info Transactions **Activities**

Filter By View: All Activities

Go to...	Comment	Assigned To	Type	Contact	Status	Due	Opp. No.	Case No.
Go to...	Comment	Ryan	Other	Amy	Completed	Jul-29-2010 01:30 PM		

An activity is entered to document the call and to record any notes.

New Activity... Refresh

Fig 2.6 – An Activity is logged detailing the phone call.

New Activity

☒ Create follow-up

Follow-up date: Oct-26-2010 01:33 PM
 Follow-up Assigned To: Ryan
 Follow-up Type: Phone Call Outgoing
 Follow-up Status: Not Started
 Follow-up Priority: 2-Medium
 Follow-up Comment: Call Amy and see if we can see anything else.

Fig 2.7 – A follow up is also created from the same Activity window.

ItemInventory

Name / Number: Demo Kit - Mini
 Subitem of:
 Manufacturers Part Number:
 Unit of Measure (U/M): Count in each

☐ Is Active?

Add a checkbox labeled "Include in Sales Report"

Sale and Purchase Information | Inventory Information | Bins for this Item | Serial Numbers for this Item

Purchase Description: test demo
 Cost: 12.00
 COGS Account: Cost of Goods Sold
 Preferred Vendor: Bell's Hell's

Sales Description: test demo
 Sales Price: 12.00
 Tax Code: Tax
 Income Account: Sales

Fig 2.8 – The Items that are displayed in the report are filtered from the Items screen in Method. We would like a checkbox here that is labeled “Include in Sales Report”. If you do not check this box, then this item is excluded from the report that is displayed on the Sales Stats tab on the Customer List.

Item	Qty	Sales Price	Amount
Logitech Wir	69.00	99.99	6,899.31
AR BD	46.00	100.00	4,600.00
AR CB	40.00	100.00	4,000.00
AR BID	18.00	100.00	1,800.00
Halibut	18.00	8.40	151.20
Salt (bag)	13.00	7.00	91.00
AR CAD	10.00	100.00	1,000.00
AR CI	8.00	100.00	800.00
AR AD	7.00	100.00	700.00
AR CB	6.00	90.00	540.00
AR CL	4.00	100.00	400.00
Hockey Stick	4.00	89.99	359.96
AR CO	3.00	100.00	300.00
Magenta	1.00	175.00	175.00
			299.00

These 2 fields should be date pickers that allow us to set a range.

This is how we would like the report to look on the Sales Stats tab.

This should be a button that regenerates the report using the date picker values as a date range.

From To

Fig 2.9 – This picture shows how we would like the Sales Stats tab to look. It will be a Tab Section on the Customer List, and will have 2 date pickers that act as a date range. We would like a button that will regenerate the report in case we want to change our date range.

5. Reports (Optional)

method
5 Horn Rd - Suite 400 -
Sacramento, CA
94523

invoice

Invoice Date: Jul-16-2010
Invoice Number: 819
Amount Due: **\$107.00**
Payment Terms: 2% 10 Net 30

Payment Amount:
Payment Method: ☐ Cash ☐ Check ☐ Credit Card
Credit Card: ☐ VISA ☐ MasterCard Exp. ____/____/____
Credit Number: _____
Signature: _____

account details and summary

Smiths Electronics
Woodbridge, ON L4L6V2

Invoice Date: 07/16/2010
Invoice Number: 819
Amount Due: **\$107.00**
Payment Terms: 2% 10 Net 30

Date	Description <i>Details</i>	U/M	Item Price	Quantity	Total Price
07/16/2010	AR BD BUILDING DEPARTMENT LIAISON		\$100.00	1	\$100.00

Fig 3.0 – Changes to Invoice Print Preview. We would like the existing Invoice report to be customized as well. Above is a picture showing all the changes we require.

6. Glossary of Terms

Lead - A potential Customer interested in our products. Sometimes Prospect is used instead of Lead within our Company.

PE (Product Executive) - Product Executives are Managers of Product Specialists. They analyze trends and determine goals of the Company.

PS (Product Specialist) - Product Specialists are Sales Representatives that are responsible for contacting Leads / Customers and selling products.

Sales Stats (Sales Statistics report) - A tab section on the Customer List screen, displaying a report generated to show a history of items purchased by Customer within a date range.

MOPI (Microsoft Outlook Plug-In) - The Microsoft Outlook Plug-In is an integration tool that allows users to sync data between Microsoft Outlook and Method Integration.