

ERP

# Sales CRM Module Deal Management

Requirements Specification

Revalsys



**REVALSYS**  
CREATING POSSIBILITIES

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## 2 CRM – Deal Management

### **Definition:**

Deal management in CRM (Customer Relationship Management) refers to the systematic process of tracking, organizing, and managing sales opportunities or potential transactions with customers or clients within the CRM system. It involves the end-to-end management of deals or sales opportunities, starting from their creation through various stages until successful closure.

### **Overview:**

“Deal management” is the second stage of Lead management flow.

### **Purpose:**

- Deal management in CRM streamlines the sales process by organizing and tracking potential opportunities, offering clear pipeline visibility and enhancing team collaboration.
- It centralizes crucial information, enabling efficient planning of activities, proactive follow-ups, and data-driven performance analysis for strategic decision-making.
- With a focus on customer relationship enhancement and automation, deal management optimizes the entire sales cycle, contributing to improved efficiency and successful outcomes.

### **Deal Management Functional Requirements –**

Deal Creation is the process of adding the new deal into CRM where it follows few user stories such as below.

## 2.0 User Stories

### 2.1 EPIC- 01- Deal Management Module

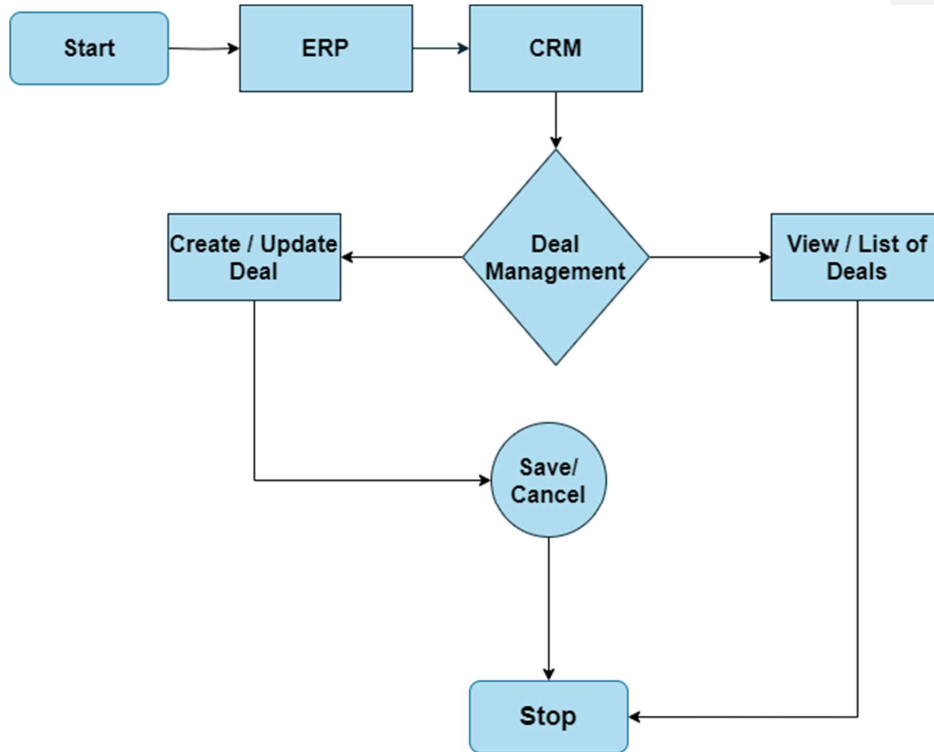
#### 2.1.1 User Story 1 – Create / Update a Deal.

As a User, I want to create / Update a deal by providing necessary details, so that I can track/Manage Deals Information in the CRM system.

##### **Description**

- As A User I would like to see an Autogenerated Deal ID.
- As A User I would Like to Add an Account Name.
- As A User I would Like to Enter a Product ID in the Product ID Text Box.
- As A User I would Like to Search for a Product by clicking on the Search Button.
- As A User I would Like to see an Auto Fetched Product Name based on the entered Product ID.
- As A User I would Like to see an Auto Fetched Product Price based on the entered Product ID.
- As A User I would Like to see an Auto Fetched Product offer price based on the entered Product ID.
- As A User I would like to add An Expected Closure Date using Date Picker.
- As A User I would Like to Pick a Deal Stage from the Drop Down.
- As A User I would Like to Select the reason for Won/Lost from the “If Won/Lost Reason” Drop down
- As A User I would Like to Submit the Reason by clicking the Submit Button.

### 1.1 User Flow .



## 1.1 Screen – Deal Creation / Edit (update)

HEADER

Create / Update a Deal

Deal ID

Should Auto Generated 1

Account Name (Company name ( B2C ), Company name B2C)

Enter Account Name 2

Product ID

Enter Product Id 3

Product Name

Should Auto Generated 4

Product Price

Should Auto Generated 5

Offer Price

Enter Offer Price 6

Deal Value

Enter Deal Value 7

Expected Clouser Date

dd mm yyyy 8

Deal Stage

Select Deal Stage 9

If won / Lost

Select Reason 10

Submit 11 cancel 12

### Create or Update Deal:

SL No	Field Name	Mandatory	Input Type	Acceptance Criteria
2.1.1.1	Deal ID	Yes	Auto – Generated	<ul style="list-style-type: none"> <li>The system should automatically generate a unique Deal ID for each newly created deal in the CRM application.</li> <li>Deal IDs should follow a consistent and easily understandable format for users.</li> <li>Users should not be required to manually input or modify the Deal ID during the deal creation process.</li> <li>The generated Deal ID should be displayed prominently on the deal creation page for user reference.</li> <li>The prefixes and suffixes should work with Store configuration. Example: Reval111 (this should be configured at store creation)</li> </ul>

Commented [MS1]: Please add required error message

				<ul style="list-style-type: none"> <li>Deal IDs should be alphanumeric and may include a combination of letters and numbers.</li> <li>The system should ensure that auto-generated Deal IDs are unique across all deals within the CRM application.</li> </ul>
2.1.1.2	Account Name	Yes	Drop Down	<ul style="list-style-type: none"> <li>The drop down should have a search option.</li> <li>Users can enter text characters to accurately represent the Account Name.</li> <li>The text box allows a reasonable length for the Account Name, ensuring clarity.</li> <li>Account names can be alphanumeric. Example: <b>Google123</b></li> <li>Clear guidance is provided in case of errors or omissions in the company name input.</li> <li>Character limited to <b>64</b>.</li> </ul> <p><b>Error Cases: -</b></p> <ol style="list-style-type: none"> <li>Please enter the Account name.</li> <li>The Account name field cannot be left empty.</li> <li>Account names should contain at least 3 characters.</li> <li>Account name cannot exceed 64 characters.</li> <li>Invalid characters entered. Please use letters, numbers, and common punctuation.</li> <li>Special characters such as emojis are not allowed in the Account name field.</li> </ol>
2.1.1.3	Product ID	Yes	Text box with search	<ul style="list-style-type: none"> <li>The text field should allow users to input alphanumeric characters, accommodating various product ID formats.</li> <li>The product id should have minimum of 3 characters.</li> <li>Users should be able to enter product IDs with a length that meets the specified character limit, <b>if any</b>.</li> </ul> <p><b>Example: ABC123</b></p> <ul style="list-style-type: none"> <li>Based on the search field it should display the matched product list in the pop up where user can select one product using radio button.</li> </ul>

**Commented [MSV2]:** Error message 1 is enough to serve then purpose

**Commented [PK3R2]:** Changed all the error messages to error cases in LLD please add the messages you want to display.

**Commented [MSV4]:** This all error states will be handled through regular expression, so single 'Invalid Account Name' message can be displayed

**Commented [PK5R4]:** Changed all the error messages to error cases in LLD please add the messages you want to display.

				<ul style="list-style-type: none"> <li>If the search consists of single record it should auto selected and popup should not be displayed.</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>Please enter a valid product ID. Product IDs typically consist of alphanumeric characters and may be case-sensitive.</li> <li>Product ID is required. Please provide a valid product ID to proceed.</li> <li>Sorry, the product ID you entered does not match any products in our database. Please check the ID and try again.</li> <li>Unable to retrieve product information due to a database connection error. Please try again later.</li> <li>The product ID you entered is too long. Please limit the ID to 32 characters.</li> <li>Product IDs cannot contain special characters or spaces. Please remove any unsupported characters and try again.</li> <li>An unexpected error occurred while processing your request. Please try again later or contact support for assistance.</li> </ol>
<b>bove</b> <b>2.1.1.3.1</b>	Search	Yes	Button	<ul style="list-style-type: none"> <li>The search button should be prominently displayed on the user interface, preferably in a location easily accessible to users.</li> <li>The search button's appearance and location should be consistent across different pages or sections of the application.</li> <li>The search button should be clickable, allowing users to interact with it using mouse clicks or touch gestures.</li> <li>Clicking the search button should trigger the search functionality, either</li> </ul>

**Commented [MSV6]:** Only following messages are needed

**Commented [PK7R6]:** Changed all the error messages to error cases in LLD please add the messages you want to display.

**Commented [MSV8]:** Messages in above comment are enough to serve the purpose

				<p>by opening a search bar or initiating a search process.</p> <ul style="list-style-type: none"> <li>The search button should be accessible to users with disabilities, including those who rely on screen readers or keyboard navigation. It should have appropriate HTML attributes for accessibility, such as aria-label or alt text.</li> <li>The search button should function correctly across different web browsers and devices, ensuring a consistent user experience.</li> <li>The search button's performance should be optimized to minimize loading times and ensure smooth interaction, especially in scenarios involving large datasets or complex search algorithms.</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>Sorry, we couldn't find any results matching your search query. Please try again with different keywords.</li> <li>We're sorry, but an unexpected error occurred while processing your search request. Please try again later or contact support for assistance.</li> <li>Unable to connect to the server. Please check your internet connection and try again.</li> <li>An error occurred while retrieving search results from the database. Please try again later or contact support for assistance.</li> </ol>
2.1.1.4	Product Name	Yes	Auto – Fetch	<ul style="list-style-type: none"> <li>As per the defined product selection the product name should be auto fetch based on Product ID.</li> </ul>
2.1.1.5	Product Price	Yes	Auto – Fetch	<ul style="list-style-type: none"> <li>As per the defined product selection the product price should be auto fetch based on Product ID.</li> </ul>

2.1.1.6	Product Offer Price	Yes	Auto – Fetch	<ul style="list-style-type: none"> <li>As per the defined product selection the product offer price should be auto fetch based on Product ID.</li> </ul>
2.1.1.7	Deal Value	Yes	Text box	<ul style="list-style-type: none"> <li>The text field should allow users to input numeric values, accommodating various deal values for different transactions.</li> <li>Users should be able to enter deal values with a range of decimal places. Example: 1234</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>Please enter the deal value.</li> <li>Deal value field cannot be left empty.</li> <li>Invalid deal value format. Please enter a numerical value.</li> <li>Deal value should be a positive number.</li> <li>Deal values cannot contain letters or special characters.</li> </ol>
2.1.1.8	Expected Closure Date	No	Date Picker	<ul style="list-style-type: none"> <li>The text field should allow users to input numeric values, accommodating various deal values for different transactions.</li> <li>Users should be able to enter deal values with a range of decimal places, as required by financial policy.</li> <li>In case of any validation errors related to the deal value input, users should receive clear and informative error messages guiding them to correct the issue.</li> <li>Date format should be (dd mmm yyyy) <b>Example: 16 Feb 2024</b></li> </ul>
2.1.1.9	Deal Stage	No	Dropdown Possible Values (In Progress, Pending for Approval, Approved, Rejected, Won, Lost)	<ul style="list-style-type: none"> <li>The dropdown should display a comprehensive list of deal stages sourced from the deal stage master, ensuring completeness and accuracy.</li> <li>Users should be able to select a specific deal stage from the dropdown efficiently.</li> <li>The dropdown should provide clear visual indicators or labels for each deal stage, aiding users in making accurate selections.</li> <li>Users should be able to easily navigate through the available deal stages within</li> </ul>

				the dropdown, even if the list is extensive.
<b>2.1.1.10</b>	If won \ Lost Reason	Yes	Dropdown	<ul style="list-style-type: none"> <li>• The dropdown should display a comprehensive list of reasons sourced from the "If Won or Lost" master, ensuring completeness and accuracy.</li> <li>• Users should be able to select a specific reason from the dropdown efficiently when marking a deal as won or lost.</li> <li>• In case of any issues related to the dropdown or the selection of a reason, users should receive informative error messages guiding them to resolve the problem.</li> <li>• The dropdown should provide clear visual indicators or labels for each reason, aiding users in making accurate selections.</li> <li>• Users should be able to easily navigate through the available reasons within the dropdown, even if the list is extensive.</li> </ul>
<b>2.1.1.11</b>	Submit	yes	Button	<ul style="list-style-type: none"> <li>• The Submit button should be prominently displayed on the screen, clearly labeled as "Submit."</li> <li>• The button should work only when all mandatory fields are filled correctly, ensuring users cannot submit incomplete or invalid data.</li> <li>• Clicking the Submit button should trigger the submission process, initiating any necessary backend operations and data processing.</li> <li>• Upon successful submission, users should receive immediate visual feedback confirming their action (e.g., a success message or a visual indication such as a checkmark or taking the user to the next Logical screen).</li> <li>• If there are errors or issues with the submitted data, clicking the Submit button should trigger appropriate error handling mechanisms, providing clear error messages to the user.</li> <li>• The button should have adequate spacing and be visually distinguishable from other elements on the page,</li> </ul>

				<p>ensuring ease of identification and interaction.</p> <ul style="list-style-type: none"> <li>• The Submit button should be responsive, functioning correctly across various devices and screen sizes.</li> <li>• The button should adhere to accessibility standards, ensuring it is operable by users with disabilities using assistive technologies.</li> <li>• The Submit button should be positioned logically within the user interface, typically at the bottom of the form or in a location where users expect to find it.</li> </ul> <p><b>Error Cases:</b></p> <ul style="list-style-type: none"> <li>• Please fill in all required fields before submitting.</li> <li>• Invalid data entered. Please review the form and correct any errors.</li> <li>• Submission failed. Please try again later.</li> <li>• Error processing your request. Please contact support for assistance.</li> <li>• Error occurred during submission. Please refresh the page and try again.</li> </ul>
2.1.1.12	Cancel	No	Button	<ul style="list-style-type: none"> <li>• The Cancel button should be clearly labeled and prominently displayed on the screen, indicating its purpose to users.</li> <li>• Clicking the Cancel button should discard any unsaved changes made to the data without affecting the original data.</li> <li>• The button should be responsive, triggering the cancellation process without unnecessary delay or loading.</li> <li>• Upon clicking the Cancel button, users should receive a confirmation prompt if there are unsaved changes, ensuring they are aware of potential data loss. <b>“You have unsaved changes; do you want to leave?”</b></li> <li>• It should adhere to accessibility standards, ensuring it is operable by users with disabilities using assistive technologies.</li> <li>• The position of the Cancel button should be logical within the user interface, typically located near other action</li> </ul>

				<p>buttons or in a prominent location where users expect to find it.</p> <ul style="list-style-type: none"> <li>• The Cancel button should function consistently across different pages or forms within the application.</li> <li>• After clicking cancel, it should take the user back to the Deal Management view page.</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>1. Failed to cancel changes. Please try again later.</li> <li>2. Error encountered while canceling. Please check your internet connection and try again.</li> <li>3. Cancellation unsuccessful. An unexpected error occurred.</li> <li>4. Cancellation process failed. Please contact support for further assistance.</li> </ol>
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### 2.1.2 User Story 2 – Deal List View.

As a User, I want to set deal stages in the CRM to monitor the progress of each deal and forecast future sales.

**Description**

- As A User I would like to see a Deal ID
- As A User I would Like to see account name
- As A User I would Like to see product id
- As A User I would Like to see product price.
- As A User I would Like to see deal value.
- As A User I would Like to deal stage.

## 1.2 Screen – Deal List View

Deal Id	Account Name	Product ID	Price	Deal Value	Deal Stage	Activity
Cell text A1	ABC Enterprises	AS 14326	99999	100000	Ongoing ▼	View Activity
Cell text A2	xyz	AS 14326	99999	212121	Won ▼	View Activity
Cell text A3	asdf	AS 14326	99999	333333	Lost ▼	View Activity
Cell text A4	QWER	AS 14326	99999	212134	In progress ▼	View Activity
Cell text A5	T23 Pvt Ltd	AS 14326	99999	123456	In discussion ▼	View Activity

Its just a sample screen design

### Deal List View

SL No	Field Name	Mandatory	Input Type	Acceptance Criteria
2.1.2.0	Lead selection. (New Field to be added in the search bar)	No	Dropdown with search	<ul style="list-style-type: none"> <li>The drop down should have a search option.</li> <li>Users can enter text characters to accurately represent the Account Name.</li> <li>The text box allows a reasonable length for the Account Name, ensuring clarity.</li> <li>Account names can be alphanumeric. Example: <b>Google123</b></li> <li>Clear guidance is provided in case of errors or omissions in the company name input.</li> <li>Character limited to <b>64</b>.</li> </ul>
2.1.2.1	Search By	No	Text Box	<ul style="list-style-type: none"> <li>The textbox allows users to input various criteria, such as lead name, company, or status, for targeted searches.</li> <li>The system provides real-time filtering or updating of the lead view table based on the entered search query.</li> <li>Clear guidance is displayed if the search query does not match any leads in the table, prompting users to refine their search.</li> </ul>

**Commented [MSV9]:** Search By Deal ID, Lead Name only

				<ul style="list-style-type: none"> <li>The textbox accommodates a reasonable length of text for effective search queries without exceeding system constraints.</li> <li>Restrictions on the characters entered in the search-by field should not cross 64.</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>Sorry, no results were found matching your search criteria. Please try different keywords.</li> </ol>	<p><b>Commented [MSV10]:</b> Need to change for all pages, currently No records message is being displayed</p>
2.1.2.2	From Date	No	Date Picker	<ul style="list-style-type: none"> <li>The "From Date" field includes a date picker for easy selection.</li> <li>Users cannot select a date in the future; it must be in the past or the current date.</li> <li>Use the standard format as (dd mmm yyyy)</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>The "From Date" cannot exceed the Current Date.</li> </ol>	<p><b>Commented [PK11R10]:</b> Take it as the future enhancement and develop the current module with existing model.</p>
2.1.2.3	To Date	No	Date Picker	<ul style="list-style-type: none"> <li>The "To Date" field includes a date picker for easy selection.</li> <li>Users cannot select a date in the future; it must be in the past or current Date.</li> <li>Users cannot select a date prior to the "From Date."</li> <li>Use the standard format as (dd mmm yyyy)</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>The "To Date" cannot be Prior to the "From Date."</li> <li>The "To Date" cannot exceed the Current Date.</li> </ol>	<p><b>Commented [MSV12]:</b> From date can't be greater than To date. Message is being displayed for this case</p> <p><b>Commented [PK13R12]:</b> Do it as per the current process</p>
2.1.2.4	Submit	No	Button	<ul style="list-style-type: none"> <li>The Submit button should be prominently displayed on the screen, clearly labeled as "Submit."</li> <li>The button should work only when all mandatory fields are filled correctly, ensuring users cannot submit incomplete or invalid data.</li> <li>Clicking the Submit button should trigger the submission process, initiating any</li> </ul>	<p><b>Commented [MSV14]:</b> From date can't be greater than to date. Message is displayed for this case</p> <p><b>Commented [PK15R14]:</b> Do it as per the current process</p>

				<p>necessary backend operations and data processing.</p> <ul style="list-style-type: none"> <li>• Upon successful submission, users should receive immediate visual feedback confirming their action (e.g., a success message or a visual indication such as a checkmark or taking the user to the next Logical screen).</li> <li>• If there are errors or issues with the submitted data, clicking the Submit button should trigger appropriate error handling mechanisms, providing clear error messages to the user.</li> <li>• The button should have adequate spacing and be visually distinguishable from other elements on the page, ensuring ease of identification and interaction.</li> <li>• The Submit button should be responsive, functioning correctly across various devices and screen sizes.</li> <li>• The button should adhere to accessibility standards, ensuring it is operable by users with disabilities using assistive technologies.</li> <li>• The Submit button should be positioned logically within the user interface, typically at the bottom of the form or in a location where users expect to find it.</li> </ul> <p><b>Error Cases:</b></p> <ol style="list-style-type: none"> <li>1. Please fill in all required fields before submitting.</li> <li>2. Invalid data entered. Please review the form and correct any errors.</li> <li>3. Submission failed. Please try again later.</li> <li>4. Error processing your request. Please contact support for assistance.</li> <li>5. Error occurred during submission. Please refresh the page and try again.</li> </ol>
2.1.2.5	Action	No	Button	<ul style="list-style-type: none"> <li>• The User must be able to take Action from the available options. <b>Example:</b> Edit, Inactive</li> </ul>
2.1.2.5.1	Edit	No	Button	<ul style="list-style-type: none"> <li>• The User should be able to Edit the Already filled “Lead Management” Section by clicking the Edit Option.</li> </ul>

2.1.2.5.2	Inactive	No	Button	<ul style="list-style-type: none"> <li>The User Should be able to make the status of the Lead Inactive by clicking the “Inactive” Option.</li> </ul>
2.1.2.6	Show Entries	No	Drop Down	<ul style="list-style-type: none"> <li>The User should be able to select the number of entries the Lead Page should show.</li> </ul>

SL No	Field Name	Mandatory	Input Type	Acceptance Criteria
2.1.3.1	Deal Id	Yes	Auto - sync	<ul style="list-style-type: none"> <li>The details should be fetched from the Deal creation screen.</li> <li>It should fetch the option selected during deal creation.</li> </ul>
2.1.3.2	Account Name	Yes	Auto – sync	<ul style="list-style-type: none"> <li>The details should be fetched from the Deal creation screen.</li> <li>It should fetch the option selected during deal creation.</li> </ul>
2.1.3.3	Product Id	Yes	Auto – sync	<ul style="list-style-type: none"> <li>The details should be fetched from the Deal creation screen.</li> <li>It should fetch the option selected during deal creation.</li> </ul>
2.1.3.4	Price	Yes	Auto – sync	<ul style="list-style-type: none"> <li>The details should be fetched from the Deal creation screen.</li> <li>It should fetch the option selected during deal creation.</li> </ul>
2.1.3.5	Deal Value	Yes	Auto - sync	<ul style="list-style-type: none"> <li>The details should be fetched from the Deal creation screen.</li> <li>It should fetch the option selected during deal creation.</li> </ul>
2.1.3.6	Deal Stage	Yes	Text View	<ul style="list-style-type: none"> <li>The details should be fetched from the Deal creation screen.</li> <li>It should fetch the option selected during deal creation.</li> </ul>
2.1.3.7	Activity	Yes	Clickable	<ul style="list-style-type: none"> <li>The button should redirect to Activity screen.</li> </ul>

**Note:**

- Activity in the deal view screen will redirect to the activity management screen.
- The deal stage should be a dropdown that can be customized.
- Deal id, Account name, Product id, price, Deal value should be frozen in the table view.
- Account name should be clickable and should the details of lead such i.e. POC Name, POC Mobile number, POC Email, Company Email & Industry.



## 2.2 Future Enhancements:

