

Commercial Functional Design Template

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Version Control

Version	Date	Description	Author
V0.0	dd/mm/yyyy	Draft	<name>
V1.0		Final	
		New version due to Maintenance <name> / Project <name> Release: <Jira # - short description>	

Reference Documents

Description	Document Link
Data Model (draw.io)	
Process Flow (draw.io)	

Definitions

Abbreviation	Definition
CRM	Customer Relationship Management

Functional Process – <Name of process>

Business Goals

<To describe the goals that the process wants to achieve, some examples for reference: harmonize Opportunity reporting cross Solvay, have a clear view on the opportunity pipeline and forecast>

Process Flow

<to describe Functional Process description by Actors, so the business rules and expected system behavior, also need to include the process flow>

1 - High level flow process with main activities

2 - Sub-Flows to detail specific steps of the main process (inner activities part of the main activity)

Instructions for functionals to build a Flow (these instructions should be deleted after the page is published):

Step 1: Make a copy of this page to create your process and then move it to the right place

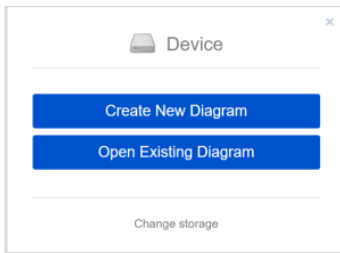
The screenshot shows a SharePoint page editor interface. The page title is "Pages / SBS IS - Customer Support / SOLVAY GROUP CRM". The page content includes a "Definitions" table with columns "Abbreviation" and "Definition", where "CRM" is defined as "Customer Relationship Management". Below this is a "Functional Process - <Name of process>" section with sub-sections for "Business Goals" and "Process Flow". The "Business Goals" section contains the text: "<to describe the goals that the process wants to achieve, some examples for reference: harmonize Opportunity reporting cross Solvay, have a clear view on the opportunity forecast>". The "Process Flow" section contains the text: "<to describe Functional Process description by Actors, so the business rules and expected system behavior, also need to include the process flow>". A context menu is open on the right side of the page, with "Copy" and "Move" options highlighted.

Step 2: Go to [google drive](#) and download the template.drawio (it contains the process flow, use cases and data model diagrams)

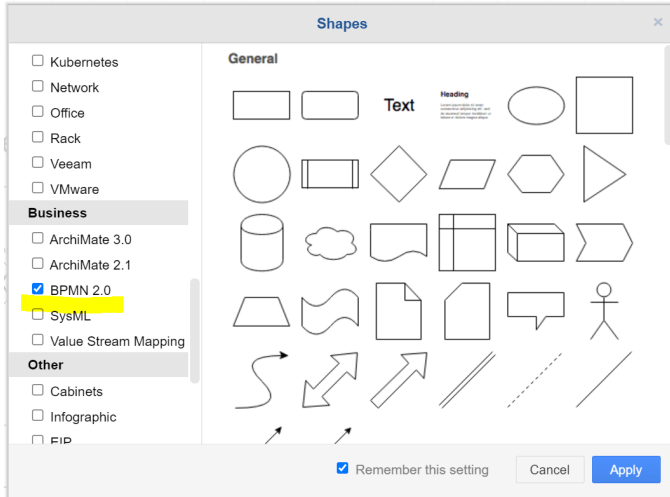
The screenshot shows a Google Drive interface. The search bar contains "Pesquisar no Drive". The breadcrumb path is "SBS IS Applications > OTC team > 10. CRM > Wiki - Storage of Functional Design Diagrams". A notification banner reads "Agora pode bloquear pessoas no Drive Para impedir que as pessoas fora da sua entidade partilhem ficheiros indesejados". The "Pastas" section shows a folder named "1. Commercial Service Pr...". The "Ficheiros" section shows a file named "template (1).drawio".

Step 3: build the flow using [draw.io](#)

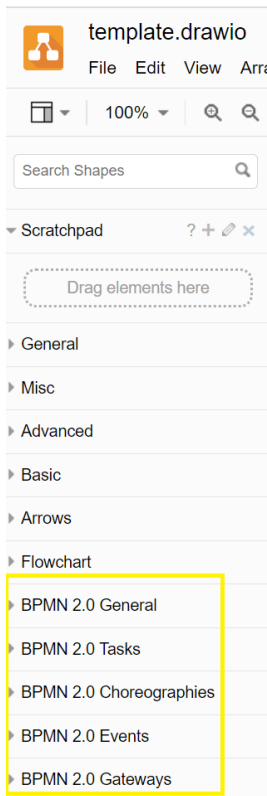
go to [draw.io](#), choose the option Open Existing diagram and select the file downloaded before



On the left bottom corner, click on more shapes, on the left-side panel scroll down until you find BPMN 2.0

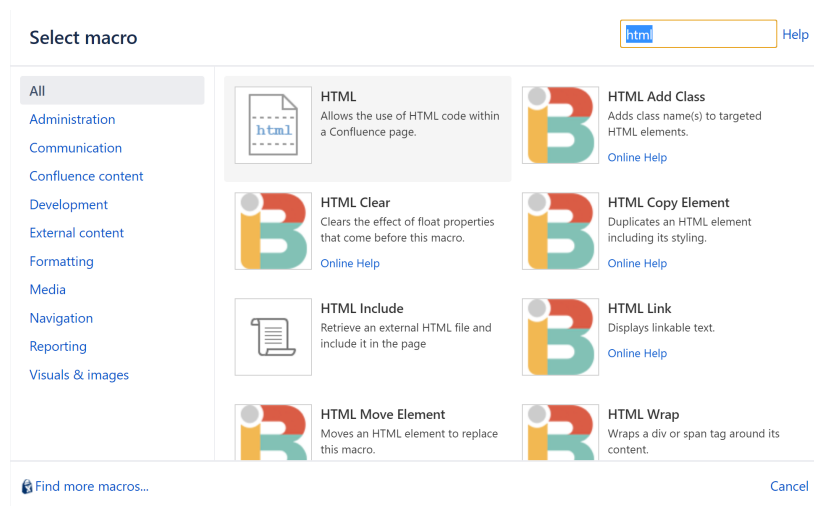


please select the checkbox to have the BPMN symbols available in the draw.io left pane



Step 4: build the flow, please see the example below for reference

More examples: <https://app.diagrams.net/#G1MVufmWiJkTX4zL575PT2Ro6vS9BghNxM>



End of Instructions

Use Cases

<To describe the separate actions that each type of profile can do. This is to allow the security to be set up at the object (CRUD - Create, Read, Update, Delete) and future level (Use case).

The arrows up represent the inheritance relationship between the actors (profiles). It means that an Admin is allowed to perform the actions directly assigned to him + all the other actions performed by the actors above him.>

Instructions:

Use the same process as described in the previous paragraph to build the flow.

Use Cases & Actors Diagram

Data Model

<The data model displays the entities involved and how they are related in the process.>

Instructions:

Step 1: Determine the relationship between objects:

if the relationship is one-to-one, (example: a case is linked to one single account) we add 1 in both side corners

if the relationship is one-to-many (example: an account is linked to one or more cases; one opportunity is linked to one or more realized sales) we add n at the farthest corner

Step 2: use the same process as described in the Process flow paragraph to build the flow

Step 3: Validate the data model and relationships with the developer

Step 4: Update data dictionary - <insert link>

End of instructions