

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

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>

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

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

Drive

Pesquisar no Drive

SBS IS Applications > OTC team > 10. CRM > Wiki - Storage of Functional Design Diagrams

Agora pode bloquear pessoas no Drive Para impedir que as pessoas fora da sua entidade partilhem ficheiros indesejados

Pastas

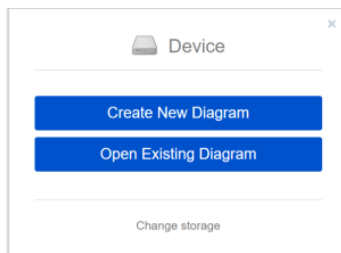
1. Commercial Service Pr...

Ficheiros

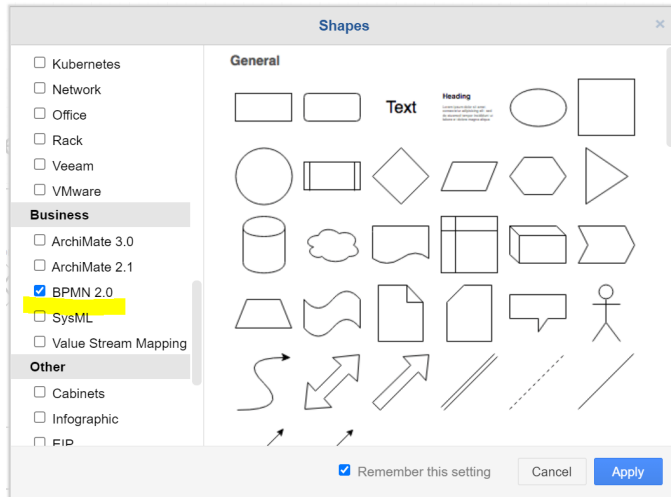
template (1).drawio

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

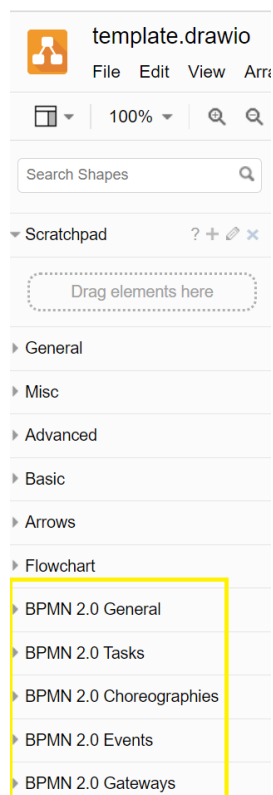
go to [draw.io](#), choose the option Open Existing diagram and select the file downloaded before



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



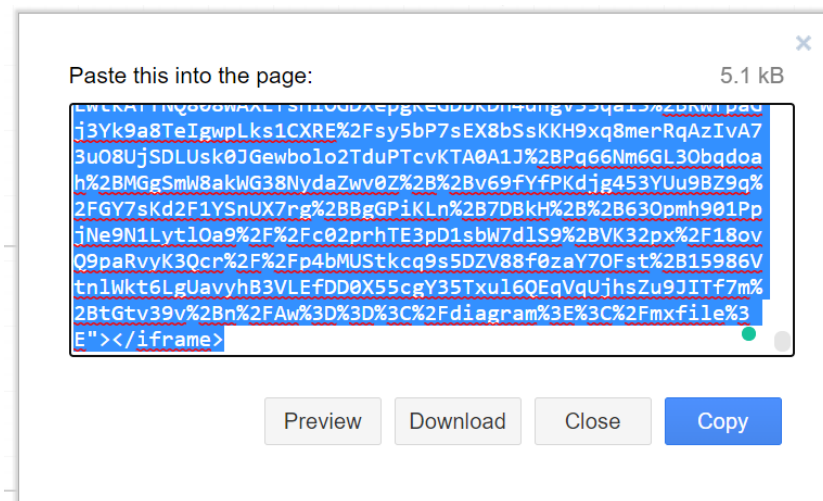
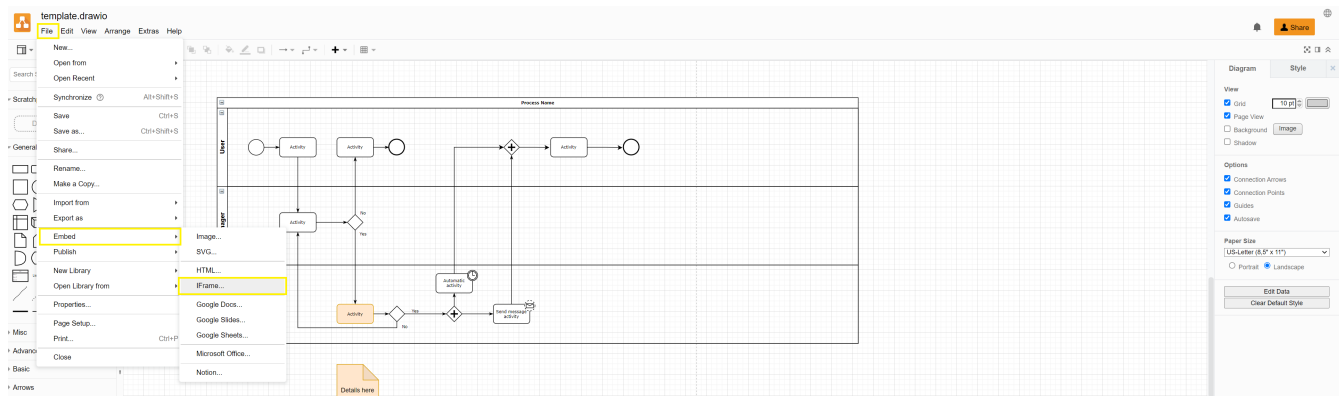
Step 4: build the flow, please see the example below for reference

More examples: <https://app.diagrams.net/#G1MVufmWiJKTX4zL575PT2Ro6vS9BghNxM>

This diagram is using BPMN (Business Process Model and Notation), [here](#) is the complete specification of the standard

Step 5: make sure the diagram is stored in the google drive folder <https://drive.google.com/drive/folders/1dQz9HfEYZsHwZRRpl8k23QuYjNY85Vou>

Step 6: On the flow created, go to File > Embed > IFrame > push Create button > copy the code generated

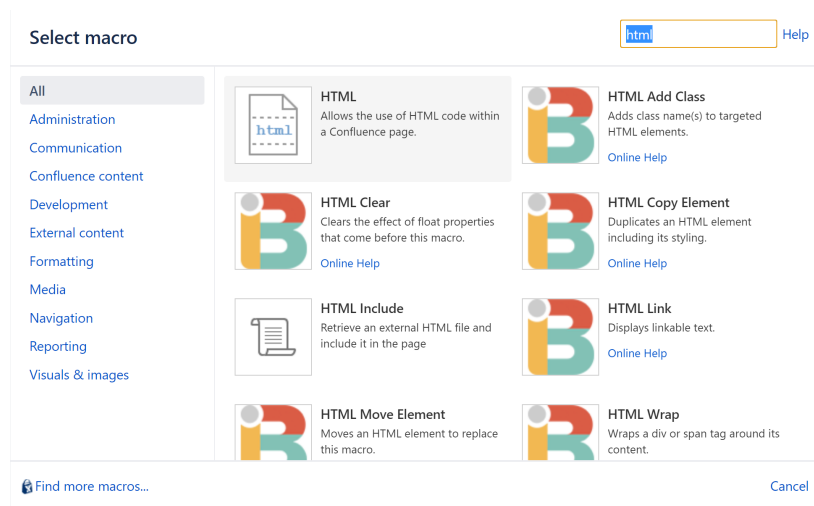


Step 7: on your confluence page edit the HTML component below and replace the code

or



on top of the page, go to , click the down arrow, select Other macros, search for HTML, select it and then, click Insert. Then, paste the code inside the component.



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