



# STATEMENT OF WORK

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FOR MICROSOFT DYNAMICS D365 – CUSTOMER SERVICE (YES X1! PACK)

Customer Contact Details -

- Name of End Customer:
- Main contact
- Phone
- Email
- Address

Required Date of Go Live:

# 1. The Fixed Functionality of Customer Service YES X1! Pack

Microsoft Dynamics 365 for Customer Service is a Service Management App that is part of a larger suite of Microsoft Business Applications.

The fixed functionality included in the Customer Service X1 Pack is listed below in **Green**.

The functionality available in other apps in the Business Suite are also listed but NOT included in this fixed price deliverable. Please note, however, that core functionality in Customer Service, namely Account, Contact, Goals and Contracts are used in other Apps within the Suite through Microsoft's Common Data Service.

# Functionalities

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## **Sales Pro - NOT Included**

Account - Contact - Lead - Opportunity - Quote - Order - Invoice - Products - Price List - Goals

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## **Business Central - NOT Included**

Account - Contact - General Ledger - Accounts Payable - Accounts Receivable - Projects - Warehouse Management - Manufacturing- Distribution- Time sheet - Inventory- Pricing - Purchasing

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## **Marketing - NOT Included**

Account - Contact - Lead - Marketing List (dynamic/static) - Campaigns - Quick campaigns

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## **Customer Service Functionality Included**

Account - Contact - Case Management - Contracts - SLA - Entitlements - Equipments - Resources - Goals - Articles - Knowledge base

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## **Field Service - NOT Included**

Account - Contact - Service agreement - Work orders - Schedule - Dispatch - Invoices - Customer assets - Inventory management - Purchase order - Material inward/RTA - Products - Price List

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## **Project Service Automation - NOT Included**

Account - Contact - Leads - Opportunity - Estimates - Projects - WBS - Schedule - Resource skill set - Resource booking - Time sheet - Expense booking - Customer billing

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## **Talent - NOT Included**

Recruit - Interview - Manage

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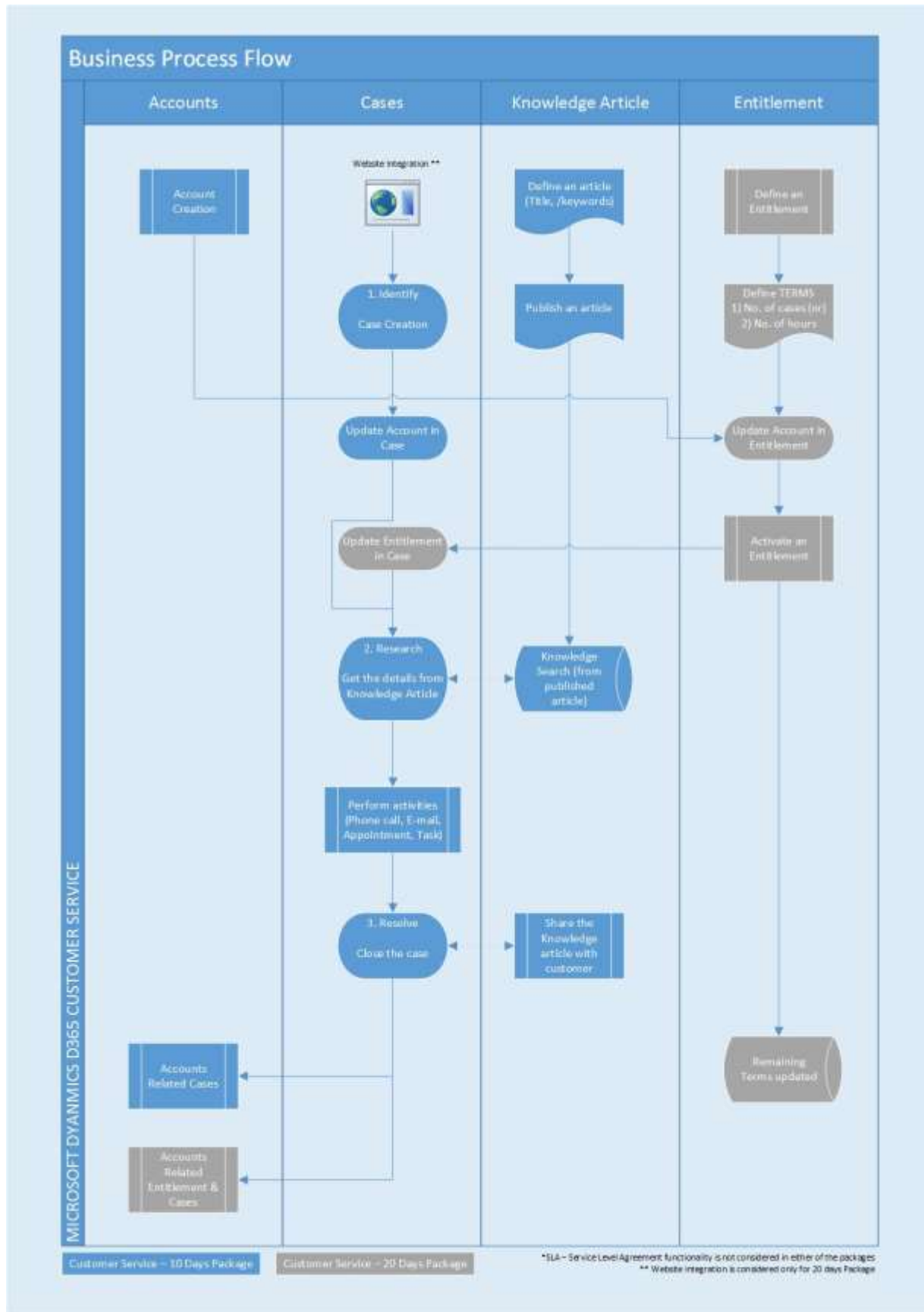
## 2. The Fixed Features Included in the Fixed Scope of the YES X1! Pack

The following fixed Features will be delivered as part of the Fixed Scope X1 Pack. Please note, where the type of automation is manual means you or your Modern Workplace Partner will have to enter the data into Customer Service manually.

Module	Work Description	Type of Automation
Account	Account creation in system	Manual
Contact	Contact creation in system	Manual
Case	Case creation in system	Manual
Case	Linking Case to an Account	Manual
Case	On Case creation a task 'TO CALL CUSTOMER' will be created (by system), with 24 hours due date to lead owner	Automated
Case	E-mail notification to Case owner for the task created	Automated
Case	If the task 'TO CALL CUSTOMER', is not completed within 24 hours, then e-mail notification to Case owner	Automated
Case	E-mail notification to Case owner when a new/existing Case is assigned	Automated
Case	Closure of Cases by Case owner	Manual
Case	E-mail notification to Case owner, when lead gets Closed	Automated
Knowledge Base	Definition of Knowledge Base	Manual
Knowledge Base	Sharing the knowledge Base to client (through e-mail only)	Automated
Knowledge Base	Suggestions of KB article using keywords	Automated
Knowledge Base	Suggestions of KB article against Cases	Automated

### 3. FIXED BUSINESS PROCESS FLOW

The following Blue Business Process Flow is included in the Fixed Scope of the Customer Service X1 Pack.



## 4. PROJECT SCHEDULE

The following Project Schedule lists the activities you and our Delivery Partner need to perform during the implementation process.

Phase	Activity Name	1	2	3	4	5	6	7	8	9	10
INITIATE	Product Walk through to key users	█									
	Discovery session to understand customer's business processes at high-level	█									
	Filling up business requirement questionnaire	█									
	Explaining data conversion excel templates to key users	█									
CONFIGURE	Setting up sandbox environment		█								
	Configuring sandbox environment		█								
	Validating master data			█							
	Uploading master data			█							
	Testing the system				█						
UAT	Train the users					█	█				
	Validating user training							█			
GO-LIVE	Setting up production environment								█		
	Go-live									█	█

## PROJECT RESPONSIBILITY MATRIX

This matrix lists your responsibilities, your Modern Workplace partner responsibilities and our Delivery Partner's responsibilities during the implementation process.

Phase	Activity Name	DP	YES!	CUST
INITIATE	Product Walk through to key users	C	R	A
	Discovery session to understand customer's business processes at high-level	C	R	A
	Filling up business requirement questionnaire	C	R	A
	Explaining data templates to key users	C	R	A
CONFIGURE	Setting up sandbox environment	R	A	
	Configuring sandbox environment	R	A	
	Validating master data	R	A	I
	Uploading master data	R	A	
	Testing the system	R	A	
UAT	Train the users	C	R	A
	Validating user training		R	R
GO-LIVE	Setting up production environment		A	
	Go-live		R	R

R - Responsible    A - Accountable    C - Consulted    I - Informed

DP – Delivery Partner

YES Dynamic

CUST – End Customer

## 5. IMPLEMENTATION PROCESS MODEL

PHASE	ENTRY	TASK	VALIDATION	EXIT
INITIATE	1. Receipt of PO from customer	1. Product walkthrough to key users 2. Discovery session 3. Fill out Microwarehouse questionnaire 4. Explain data templates		1. Processes must be agreed 2. Understanding data templates
CONFIGURE	1. Processes must be agreed 2. Understanding data templates	1. Setting up & configure sandbox environment 2. Validate master data 3. Upload master data 4. Testing the system	1. Users can get access 2. Uploaded master data must be verified	1. Phase completion review
UAT	1. 2 <sup>nd</sup> phase review	1. Train the users 2. Test the system	1. Verify master data 2. Scenario based testing	1. UAT Sign-off
GO-LIVE	1. UAT Sign-off	1. Setting up & configure production environment 2. Upload master data	1. Users can get access 2. Verify master data	1. Go-live sign-off

## 6. PACK WARRANTY

We will provide you with Pack Warranty to insure you are satisfied with the delivered solution. Please note: This warranty is NOT support. It is a DIAGNOSTIC service only. Any questions or queries you have can be channelled to our support desk where we will diagnose the issue and recommend a path of resolution which may be a simple fix, a change request or a need for training, etc. Our Pack Warranty will diagnose the issue. It will NOT resolve the problem. If you want to buy a full Pack Support offering, we can offer you prepaid Support Packs (in increments of 50 hours) for problem resolution.

By signing this agreement, I agree to pay 50% of the fixed price fee to begin the X1 Pack Implementation. I will pay and the remaining 50% when the project goes live.

Name of End Customer: \_\_\_\_\_

Name of Signatory: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_