STATEMENT OF WORK

FOR MICROSOFT DYNAMICS D365 – SALES PRO (YES X1!)

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

Required Date of Go Live:

1. The Fixed Functionality of Sales Pro Yes X1!

Microsoft Dynamics 365 for Sales Pro is an Opportunity Management App that is part of a larger suite of Microsoft Business Applications.

The fixed functionality included in the Sales Pro Basic Pack is listed below in Blue.

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

Functionalities

Sales Pro Functionality Included

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

Business Central - NOT Included

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

Marketing - NOT Included

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

Customer Service - NOT Included

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

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

Project Service Automation - NOT Included

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

Talent - NOT Included

Recruit - Interview - Manage

2. The Fixed Features Included in the Fixed Scope of Yes X1!

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

Module	Work Description	Type of Automation
Lead	Lead creation in system	Manual
Lead	On lead creation a task 'TO CALL CUSTOMER' will be created (by system), with 24 hours due date to lead owner	Automated
Lead	E-mail notification to lead owner for the task created	Automated
Lead	If the task 'TO CALL CUSTOMER', is not completed within 24 hours, then e-mail notification to lead owner	Automated
Lead	E-mail notification to lead owner when a new/existing lead is assigned	Automated
Lead	Qualification of leads by lead owner	Manual
Lead	E-mail notification to lead owner when lead gets qualified	Automated
Lead	Automatic creation of Customer (Account) & contact when lead is converted to opportunity	Automated
Opportunity	On opportunity creation a task 'TO FOLLOW-UP CUSTOMER' will be created (by system) with 24 hours due date to opportunity owner	Automated
Opportunity	E-mail notification to opportunity owner for the task created	Automated
Opportunity	If the task 'TO FOLLOW-UP CUSTOMER', is not completed within 24 hours, then e-mail notification to opportunity owner	Automated
Opportunity	E-mail notification to opportunity owner for when a prospect moves from one stage to another	Automated
Opportunity	Adding products/services to an existing opportunity	Manual
Quotes	Creation of quotation from an opportunity	Automated
Quotes	Revisions of quotation	Manual
Quotes	Sending sales quote to customer (format will not be available in system)	Manual
Opportunity	Closure of an opportunity (won/loss)	Manual
Opportunity	E-mail notification to opportunity owner when an opportunity is won/lost	Automated
Order	Sales order creation from quote	Automated
Order	Sending Order acceptance/acknowledgement to customer (format will not be available in system)	Manual
Invoice	Sales invoice creation from sales order	Manual
Invoice	Sending Invoice to customer (format will not be available in system)	Manual
Office365 Integration	Office 365 Outlook Web Client & Desktop Client	

3. FIXED BUSINESS PROCESS FLOW

The following Business Process Flow is included in the Fixed Scope of the Sales Pro Yes X1!
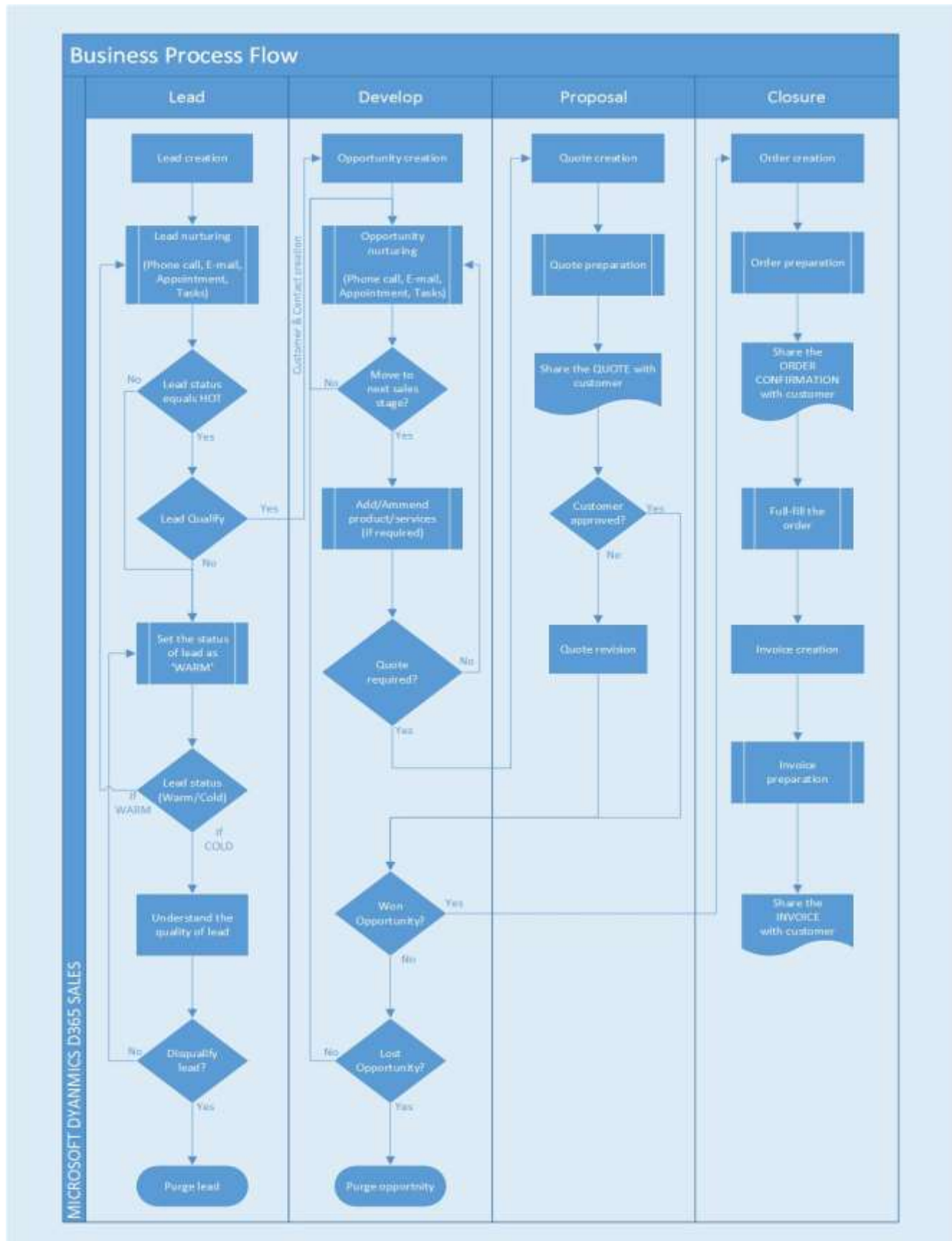
4. PROJECT SCHEDULE

The following Project Schedule lists the activities we 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 and our responsibilities during the implementation process.

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

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

Yes! – Delivery Partner   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. 2nd 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 Yes X1! Implementation. I will pay and the remaining 50% when the project goes live.

Name of End Customer: _____

Name of Signatory: _____

Signature: _____

Date: _____