

Deliverables Deep Dive: Requirements

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Agenda

Summary of the session



High-level Summary



- What Are Requirements?
- Writing Good Requirements
- Mapping Requirements to Business Processes
- Demo 1: Out-of-Scope Requirement (F&O)
- Demo 2: Requirement → Enhancement (CE)
- Demo 3: Requirement → Integration (Dual Write)
- Resources and Next Steps

What Are Requirements?



What is a requirement?

A documented statement of a capability, condition, or constraint that the solution must satisfy to deliver value to the business

- **It describes the need - not the design**
What the solution must do, not how it must do it. Keeping these apart is what lets you decide configure vs. customize.
- **It must be satisfiable and verifiable**
If you cannot test whether the delivered solution meets the requirement, you are not ready to go live.
- **It traces to business value**
Every requirement should support a business outcome – a process improvement, a compliance obligation, a revenue or cost lever.

Two types of requirements

Every requirement is classified as one or the other

Functional

What the system should do - the specific behaviors or functions it must perform.

Examples

- Business rule
 - Customer invoice payment terms must include NET30 and Due Immediately with automatic due date calculation
- System Capability
 - Ability to define a default receipt and issue location for each warehouse

Non-functional

System attributes - how well the system should perform.

Examples

- Performance
 - Process 1,000 sales orders per minute during peak load periods
- Security & Compliance
 - Encrypt all customer data at rest and in transit using AES-256 encryption
- Quality of service
 - 99.9% uptime during business hours

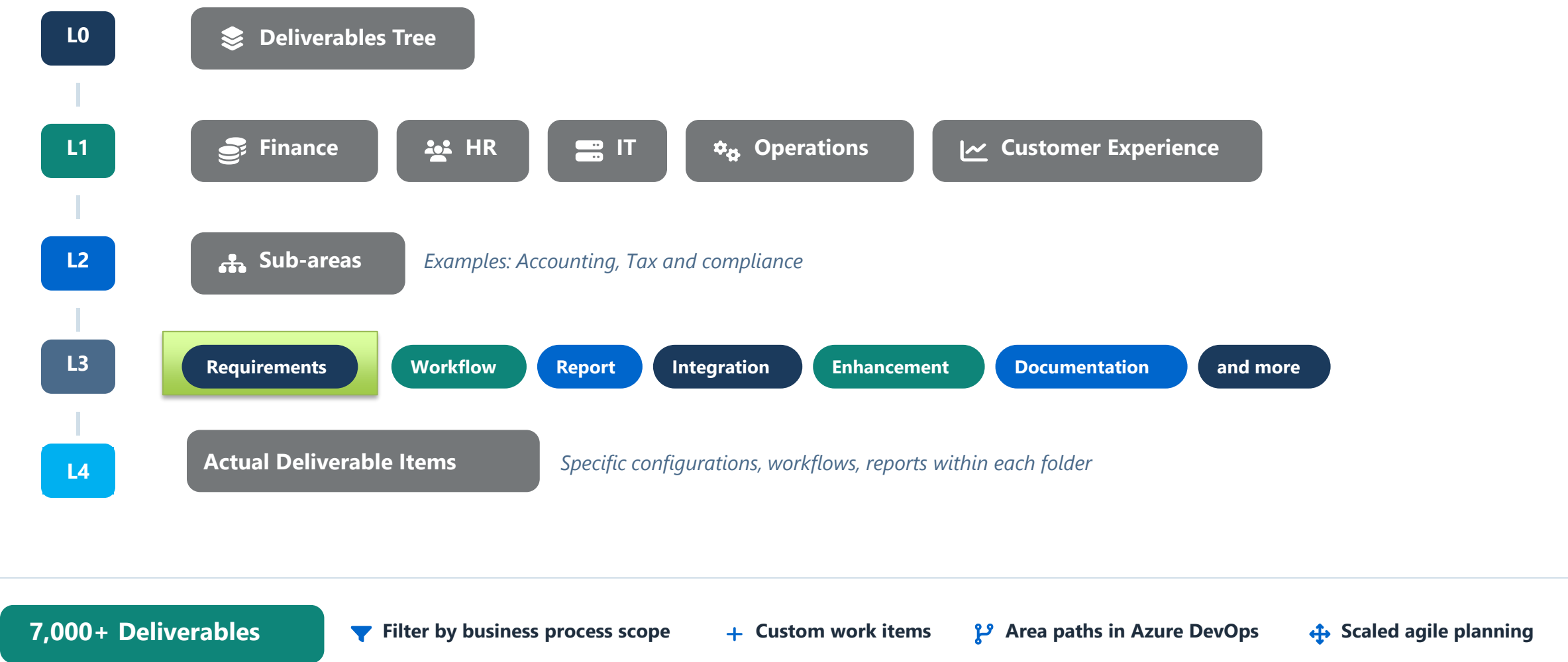
The Catalog Structure

Four interconnected pillars organize your implementation from strategic goals through execution planning — each with a hierarchical topic structure.



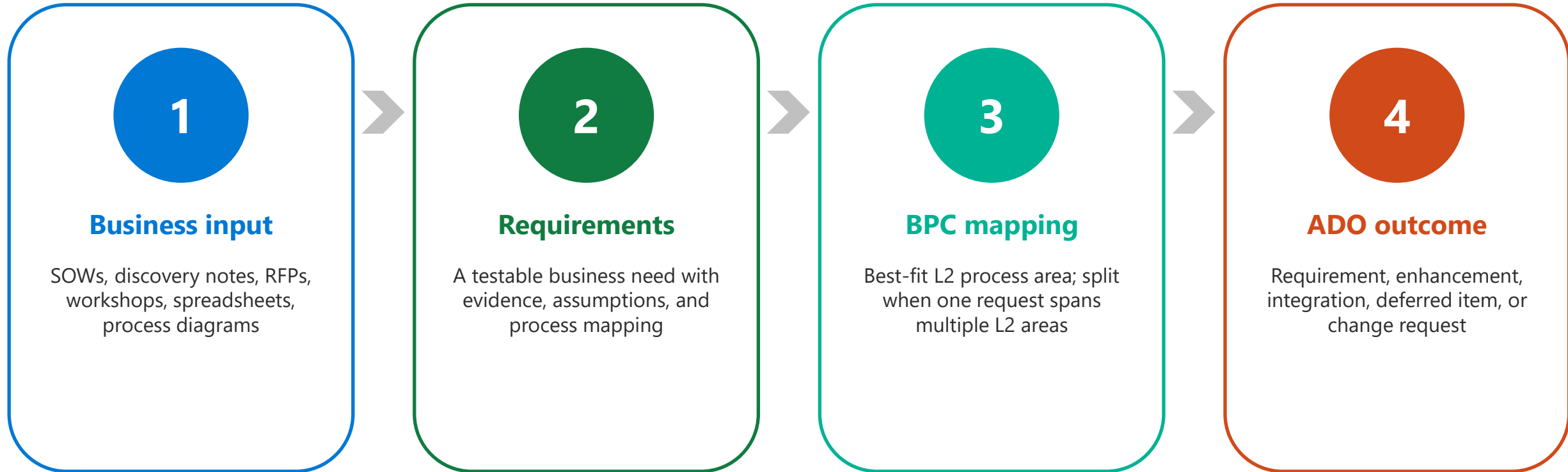
Deliverables Tree Example

The Deliverables Tree transforms flat task lists into a structured hierarchy with 7,000+ predefined deliverables



Where requirements sit in the project flow

Requirements are the first reviewable expression of business need



Writing Good Requirements



Requirement Title & Description Rules

The title IS the requirement — not a topic label

Complete Statement

Title must convey the full business ask - a reader should understand the requirement without opening the description

Fit/Gap Ready

A reviewer can evaluate whether D365 standard functionality supports the requirement from the title alone

Evidence-Backed

Include acceptance criteria when source evidence supports them. Reference specific business rules, thresholds, or constraints

Testable

A consultant can write a test validation step directly from the title - if not, the requirement is too vague

Concise but Clear

Don't sacrifice clarity for brevity. A 15-word title that captures the need is better than a 5-word topic label

Business Language

Capture the business need in stakeholder language - avoid embedding solution design unless customer-stated

What Makes a Good Requirement?

Every requirement in the deliverables tree should follow these rules



State the Business Need

A requirement must state a functional or non-functional need that D365 must fulfill. Capture the initial business need, not a detailed solution design.



Link to Process Area

Associate every requirement with the best-fit L2 process area for traceability. This ensures coverage analysis and test alignment across the business process hierarchy. It is okay to link to lower levels in the business process catalog tree.



Make It Specific

Be specific enough that a Delivery Architect, consultant, or Subject Matter Expert (SME) can validate it. Include acceptance criteria when source evidence supports them. Document dependencies and assumptions.



Validate & Preserve Evidence

Include acceptance criteria so you can validate the requirement is fulfilled. Preserve source evidence. Avoid embedding solution approaches unless customer-stated. Avoid vague wording without expected behavior, volume, timing, or outcome.

Do and Don't — Writing Requirements

The title IS the requirement — a reviewer should understand the need without opening the description

✓ Good requirement

AP clerks must apply partial payments with balance tracking

Scan receiving items to auto-update on-hand inventory

Auto-generate intercompany invoices on cross-entity shipment

Block orders automatically when customer exceeds credit limit

Sales reps view real-time customer balances during order entry

✗ Bad requirement

Accounts Payable

Inventory management

Intercompany transactions

Credit management setup

AR visibility

Do and Don't — Writing Requirements

✓ Good practices

Write it from the view of the business, not from the view of the solution

Write for a non-expert audience, avoid abbreviations and jargon where possible

✗ Bad examples

When posting a purchase order receipt, the financial dimensions must be defaulted from the project.

It must be possible to export the General ledger transactions to Excel.

When an Opp hits SQL, auto-generate the quote from the active PL, advance the BPF stage, start the SLA timer, and write the CE record back to F&O via DW

Mapping Requirements to Business Processes



Process-Focused Requirements

Link every requirement to the lowest-level process in the business process catalog tree



Avoid Isolation

Requirements without process context lead to missing steps, misinterpretation, and gaps during testing. Always anchor to a process area.



Link to L2/L3

Map each requirement to the best-fit L2 or L3 process area in the BPC hierarchy. This drives fit/gap analysis and test case generation. Link broad or general system requirements to the appropriate process in Administer to operate.



Test Coverage

Test cases should validate the end-to-end business process, not individual requirements in isolation. Process context ensures full coverage.



Fit/Gap Analysis

Use process maps to evaluate impact on connected processes. A gap in one area may ripple across the process hierarchy.

Fit-to-Standard vs Fit-Gap Analysis

Two complementary approaches for evaluating your solution

Fit-to-Standard

-  **Compare your current processes to D365 standard capabilities**
-  **Start every implementation here — adopt standard before customizing**
-  **Download and scope the BPC to identify what D365 covers out of the box**

Fit-Gap

-  **Identify gaps only after evaluating the standard solution**
-  **Gaps get a disposition: Enhancement, ISV, Integration, Power Automate, or Data Migration**
-  **Each disposition drives a specific work item type with its own lifecycle and design**

Demo 1: Out-of-Scope Requirement (F&O)



Demo 2: Requirement Becomes an Enhancement (CE)



Demo 3: Requirement Becomes an Integration (Dual Write)



Key takeaways

1 **A requirement is a business need the solution must satisfy**

Not *how* the solution must satisfy it

2 **Requirements must be anchored to processes**

They are derived from business process mapping - not gathered as isolated feature lists.

3 **Treat each requirement as a managed, traceable record**

A requirement isn't *done* when it's written



Resources and Recommendations



Microsoft Business Process Catalog Resources

- <https://aka.ms/businessprocesstechtalks>
- <https://aka.ms/oneguidance>
- <https://aka.ms/businessprocesscatalog>
- <https://aka.ms/businessprocesscatalogrequests>
- <https://aka.ms/businessprocesscatalogtemplate>
- <https://aka.ms/businessprocesscatalogsubmit>
- <https://aka.ms/businessprocessflow>
- <https://aka.ms/businessprocesscatalogfeedback>
- <https://learn.microsoft.com/en-us/dynamics365/get-started/contribute>
- Reach out to the team: bizprocessguides@microsoft.com

Microsoft and Mavim BPE Resources:

- [Microsoft Business Process Catalog in Mavim Free Preview](#)
- [Success by Design with the Dynamics 365 business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)
- [Navigate the business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)
- [Microsoft and Mavim Dynamics 365 Business Talks](#)
- [Unlocking Transformation Synergy: Mavim & Microsoft Process Catalog](#)
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QUESTIONS

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria
Děkuji **Tak** Dank u Tänan Kiitos **Merci** Danke Ευχαριστώ A dank
Mahalo ἰτι. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Ačiū Благодарам ありがとうございます
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga
Ďakujem Tack Nandri Kop khun Teşekkür ederim Дякую Хвала Diolch



Microsoft's requirement taxonomy

16 suggested requirement types — each with a canonical example

BI report monthly sales dashboard w/ drill-down

Business objective +10% customer retention this FY

Data migration migrate customer master data

Feature automated order-status email alerts

Financial report quarterly P&L with comparatives

Forms custom lead-capture form

Functional create / edit / delete customer records

Interface integrate with Outlook email sync

Operational auto inventory replenishment

Performance page load under 2 seconds

Quality of service 99.9% uptime in business hours

Safety role-based access control

Scenario order: create → approve → fulfill

Security encrypt sensitive customer data

Report monthly sales forecast report

Workflow multi-stage PO approval