**Marketing Swatch Fulfillment**

Requirements Document [APPROVED]

Version 2.0

Revision History

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Contents

[1 Introduction 4](#_Toc117160228)

[1.1 Purpose 4](#_Toc117160229)

[1.2 Scope 4](#_Toc117160230)

[1.3 Contributors 4](#_Toc117160231)

[1.4 Definitions, Acronyms and Abbreviations 4](#_Toc117160232)

[2 Overview 5](#_Toc117160233)

[2.1 Current State 5](#_Toc117160234)

[2.2 Future State Request 5](#_Toc117160235)

[3 Understanding the User Environment 6](#_Toc117160236)

[4 Assessing the Opportunity 6](#_Toc117160237)

[5 Functional Requirements 6](#_Toc117160238)

[5.1 General Requirements 6](#_Toc117160239)

[6 Questions and Issues 7](#_Toc117160240)

[7 Risks, Assumptions and Related Documentation 8](#_Toc117160241)

[7.1 Risks 8](#_Toc117160242)

[7.2 Assumptions 8](#_Toc117160243)

[7.3 Related Documentation 8](#_Toc117160244)

[8 Signoff 8](#_Toc117160245)

# Introduction

## Purpose

The Marketing department is looking to update the sample fulfillment process for fabric memos, swatches, and catalogs in order to alleviate the manual nature of the current process and provide a better customer eCommerce experience. Automating this process is in alignment with 2022 corporate goals #1 – Focus on Fundamental of the Year #12 and #2 – Simplify the Business, Drive the Core.

## Scope

Currently, the Marketing department is manually fulfilling customer fabric memo, swatch, and catalog orders. The department desires to use the newly developed website for order workflow simplicity and to eliminate inefficiencies in the current process. Additionally, Marketing would like to mirror the 2Ship automation processes utilized by the Distribution department in order to save time and alleviate bottlenecks in the current process. The focus of this document is to identify the changes required to support the desired solution as it pertains to marketing fabric memo, swatch, and catalog orders. This document does not address the marketing order changes that may be required throughout the enterprise due to forthcoming website changes.

## Contributors

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| --- | --- | --- |
| **Name** | **Department** | **Title** |
| Gwen Treptow | Marketing | Fulfillment Supervisor |

## Definitions, Acronyms and Abbreviations

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| **Term** | **Definition** |
| 2Ship | Transportation Management System that reduces shipping expenses by comparing rates and services with all the carriers to find the best price. |
| eCat | Electronic Catalog; utilized by Sales Reps and Retail to place customer orders. |
| eCommerce | Commercial transactions conducted electronically on the internet. |
| Product Catalog | Contains product and fabric information for current years line. Summer Classics, Gabby, Wendy Jane, and Summer Classics Contract all have their own Product Catalog. |
| Fabric Memo | Also known as Fabric Sample; 5”x5” piece of fabric that is attached to a card with all fabric information on the card; ordered in singles or multiples. |
| Fabric Swatch | 8”x10” piece of fabric that is attached to a card with all fabric information on the card; ordered as a set. |
| MKT | Market; used in SYSPRO to identify location/destination of inventory. |
| Pick Ticket | Picking Slip; printed order that contains the information of the items in an order that need to be pulled from the physical location and packaged for shipping to a consumer. |

# Overview

## Current State

In order to fulfill marketing fabric memo, swatch, and catalog fulfillment requests, the following steps are completed by the Marketing, Customer Service and Accounting and Finance departments:

* eCat order placed and submitted by customer, dealer or sale representative
* eCat order is received by Customer Service, converted to an order and given and order number
* Marketing runs the Access report for the Marketing warehouse to view all Status 1, Status 2 and Status 3 orders
* Marketing releases the inventory in SYSPRO
* Marketing enters each order on the Order Maintenance screen in SYSPRO
  + Order is forwarded to Accounting and Finance if a balance is due
* Marketing ends the order and clicks Print multiple times to receive the printed Pick Ticket
* Order is placed in Status 4
* Marketing picks, packages and utilizes 2Ship to create and print shipping label and information
* Marketing delivers the printed pick ticket and 2Ship tracking label to Accounting and Finance
* Accounting and Finance enters order number, tracking information, shipping date, changes status from 4 to 9 and completes the order.

## Future State Request

In order to satisfy the business’s needs to fulfill fabric memo, swatch, and catalog fulfillment requests placed/submitted through the new Summer Classics website, the following should occur:

* Fabric memo, swatch, and catalog fulfillment requests submitted through the new Summer Classics website should automatically create a SYSPRO order
* Notification of a new fabric memo, swatch, or catalog fulfillment SYSPRO order should be sent to designated Inside Sales department email addresses
  + Customer information from the order should, at a minimum, be added to SYSPRO. It is desired that it is added to SugarCRM as well for metric and report tracking.
* Modification of 2Ship to mimic the 2Ship capabilities of the Small/Partial division of the Distribution department as follows:
  + Addition of a 2Ship scannable barcode on the pick ticket
  + When barcode is scanned the following should occur:
    - Ship To and package information (weight, dimensions, etc) fields should be populated within 2Ship
    - Populate printable shipping label is autogenerated
    - Note: Department SKUs already contain the necessary information for field population
  + Clicking shipped within 2Ship changes the order to shipped status in SYSPRO

# Understanding the User Environment

* Who are the users? *Marketing, Customer Service (wholesale, contract, and eCommerce) and Inside Sales departments.*
* Which additional applications do you use that we need to interface with? *None currently identified.*
* What are your expectations for usability of the product? *Same as is currently in place for the affected applications.*
* What are your expectations for training time? *Minimal, as the general process and applications are known to the users.*
* What kinds of hard copy and online documentation do you need? *None currently.*

# Assessing the Opportunity

* Who needs this application in your organization? *Marketing Fulfillment Supervisor and Marketing Fulfillment Specialists.*
* How many of these types of users would use the application? *Typically,* *five (5).*
* How would you value a successful solution? *The ability to view a customer’s marketing supply order from placement, through fulfillment and shipping in SYSPRO. The ability for a customer to order marketing fabric memos, swatches, and catalogs from the newly developed Summer Classics website. Additionally, being able to track metrics such as conversion from memo order to product order, customers having visibility on their marketing fabric memo order, keep a better inventory of usage, being able to automatically populate 2ship labels, being able to automatically scan new items into inventory and being able to fully order memos, swatches, and catalogs on the new website with the inventory to be automatically corrected in Syspro.*

# Functional Requirements

## General Requirements

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| --- | --- | --- | --- |
| **Reference No.** | **Functional Area** | **Functional Requirement Specification** | **Priority** |
| FRS001 | Orders (SYSPRO) | Fabric memo, swatch and catalog fulfillment requests submitted through the new Summer Classics website should automatically create a SYSPRO order | H |
| FRS002 | Orders (Website) | One (1) stock code should be used for the memos, swatches, and catalogs. | M |
| FRS003 | Orders (Website) | Fabric name is displayed on Summer Classics website for customer selection. | M |
| FRS004 | Notifications (Email) | Notification of new fabric sample fulfillment orders should be automatically sent to the designated Inside Sales group email address   * Note: Access to the group email address should be provided to the following Inside Sales team and others as deemed necessary   + Dale Boehm, Kelly McGuire, Margo Scoggins, Andrew Horton     - If a group email address is not possible, then a distribution list should be created and include the applicable individuals | H |
| FRS005 | Customer Records (SYSPRO/SugarCRM) | The following customer information should be added to SYSPRO, at a minimum and SugarCRM where applicable.   * Customer or Business Name * Customer Street Address * Customer Phone Number * Customer Email Address | M |
| FRS006 | Shipping (2Ship) | Marketing memo, swatch, and catalog order fulfillment 2Ship instance should have functionality similar to the Small/partial division of the Distribution department 2Ship instance | H |
| FRS007 | Shipping (2Ship) | Pick Tickets should contain a 2Ship scannable barcode | H |
| FRS008 | Shipping (2Ship) | When scanned, a pick ticket barcode should auto-populate the Ship To and package information (weight, dimensions, etc) fields within 2Ship | H |
| FRS009 | Shipping (2Ship) | When scanned, a pick ticket barcode should autogenerate a populated printable shipping label | H |
| FRS010 | Shipping (SYSPRO/2Ship) | Clicking shipped within 2Ship changes the order to shipped status in SYSPRO | H |
| FRS011 | Reports (Access) | Marketing memo, swatch, and catalog orders should be added to the Open Order Reports under Gwen’s Reports on the Customer Service Dashboard in Access | H |

# Questions and Issues

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| --- | --- | --- |
| **Requestor** | **Question/Issue** | **Resolution/Answer** |
| Gwen | Would the email be needed if the order is going to be added to my report or is this email happening so other groups can be notified? Or is it just that we currently have an email going? | Yes, we will send to Inside Sales and ensure that it appears on Gwen’s Report therefore eliminating need for Gwen to receive an email like is currently done in the process. |
| Gwen | Do we need to include the fact that all fulfillment orders will be affected by the upgrade in Syspro and 2ship? All orders need to be able to be scanned into 2ship and updated in Syspro to show they have shipped. | Yes, we will add that this document is specific to memos, swatches and orders in the Scope, Risks and Assumptions areas of this document. |

# Risks, Assumptions and Related Documentation

## Risks

* Not updating the current fulfillment process means that users of the new Summer Classics website will be unable to order memos, swatches, or catalogs.

## Assumptions

* + Fabric availability is managed directly within Magento and requires communication with the eCommerce team.
  + No product feed adjustments expected.
  + Additional Service Desk Request tickets will be created to address the enterprise-wide updates necessary to fulfill marketing order submissions received through the new Summer Classics website and are not intended to be a part of this document.

## Related Documentation

* Service Desk Request Ticket (M Files) - [23976](https://servicedesk.summerclassics.com/app/itdesk/ui/requests/34904000014445021/details?woFrom=ZSearchFeature)
* Service Desk Request Ticket (Fabric Swatches on B2C Website) – [28817](https://servicedesk.summerclassics.com/app/itdesk/ui/requests/34904000017547613/details?woFrom=ZSearchFeature)
* [Invoice Automation Requirements](https://summerclassics.sharepoint.com/:w:/s/ITDepartment/ER6Rvtl25v5Ple7dTwoYYpsBNXcENXpOJZo9JhQ7quEgEA?e=BSqDlt)

# Signoff

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| **Name** | **Document Role** | **Department** | **Title** | **Approved** |
| Stephanie Hawkins | Contributor | MIS | Business Analyst | Approved 10/20/22 |
| Gwen Treptow | Contributor/ Stakeholder | Marketing | Fulfillment Supervisor | Gwendolyn Treptow Approved 10/20/22 |