**eConcierge Shop Xerox Canada Requirements**

**Revision History**

| Version No | Date | Prepared by / Modified by | Significant Changes |
| --- | --- | --- | --- |
| 0.1 | 17-Jan-20 | Oliver, Mark | * Initial draft |
| 0.2 | 19-Jan-20 | Oliver, Mark | * Several updates |
| 0.3 | 22-Jan-20 | Oliver, Mark | * Several updates |
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| 0.5 | 27-Jan-20 | Oliver, Mark | * Initial version for review with HCL |

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## High Level Requirement

Create a new eConcierge program in Canada with integration to the Shop Xerox Canada system, similar to the existing eConcierge Shop Xerox program in the US

## Assumptions

1. A new Program will be defined rather than trying to re-use what was defined as part of the original expansion to Canada
2. All Partner and Customer facing content will need to be localized
3. All Partner and Customer initiated financial transactions and display of financial amounts will be in Canadian dollars, even if not explicitly shown with a currency description of Canadian Dollar or a symbol of CAD
4. All existing Partner and Customer features enabled for the US Shop Xerox program will potentially also be enabled for the Canada program
5. A goal of the implementation should be to re-use existing functionality, UI, database structure, etc. where feasible, in order to reduce the overall development and testing effort

## UI Requirements

### Platform Portal

1. UI Configuration
   1. Providers -> Providers
      1. Existing “Canada eConcierge” Provider will be used
   2. Catalog -> Models
      1. Add additional Model details in French as needed
         * Note: This would only be required if any models will be enabled that were not enabled for the Canada VAR program
   3. Catalog -> Consumables -> Categories
      1. Add additional Consumable Category details in French as needed
         * Note: This would only be required if any consumable categories will be enabled that were not enabled for the Canada VAR program
   4. Catalog -> Consumables -> Thresholds
      1. No configuration changes should be required
   5. Catalog -> Consumable Part #
      1. Add additional Consumable Part details in French as needed
         * Note: This would only be required if and consumable parts will be enabled that were not enabled for the Canada VAR program
   6. Setup -> Base Data
      1. No configuration changes should be required
         * Note: Previously configured country, provinces, and language for Canada will be used
   7. Setup -> Certified Interfaces
      1. Existing certified interface will be used as follows
         * NP System - CAN System
   8. Setup -> Sourcing Locations
      1. Existing certified interface will be used as follows
         * CANSTR
2. Questions
   1. Open
      1. Will there be any additional models, consumable categories and/or consumable parts enabled for the Shop Xerox program versus the VAR program in Canada?

**Answer:** TBD

* + 1. Is there any reason (from a technical perspective) that the existing “CAN System” certified interface could not or should not be used?

**Answer:** TBD

* + 1. Is there any reason (from a technical perspective) that the existing “CANSTR” sourcing location could not or should not be used?

**Answer:** TBD

* 1. Closed
     1. None

### Provider Portal

1. UI Changes
   1. Programs -> Program Definition -> Notifications
      1. Name for the “SUPPLIES ORDERING PROCESS” template should be shown in English even when viewing notification content in French
2. UI Configuration
   1. Programs -> Program Definition -> Basic Details
      1. Define a new Program
         * Name = “Shop Xerox Canada - Xerox eConcierge”
         * Description = “Xerox eConcierge for Shop Xerox Canada”
         * Program Type = “NP”
         * Program Category = “Supplies”
         * Countries = “Canada”
         * Offer Replacement Parts = No
         * Order by Model = Yes
         * Allow Partner to Place Orders = No
         * Allow Promotions = No
           + Enable New Customer Promotion = No
           + Customer Promo Code = *blank*
         * Allow to add Meter Toner Enabled devices = Yes
         * Order Bean Life Period = 120
         * Device not reporting threshold = 7
         * Device data update waiting time = 2
         * Non-Monitored Devices Enabled = Yes
         * SA Warning Message at Time of Login Enabled = Yes
           + Prevent Login if SA Not Latest Version = No
         * Send device not reporting email alert = Yes
           + Device not reporting for = 17
           + Repeat device-not-reporting email = 3
           + Repeat device-not-reporting email after = 14
         * Send Agent installation reminder email = Yes
           + Agent not installed after customer registration for = 7
           + Repeat Agent-installation-reminder email = 3
           + Repeat Agent-installation-reminder email after = 7
         * Send device not added reminder email = Yes
           + Device not added after Agent installation for = 7
           + Repeat device-not-added reminder email = 3
           + Repeat device-not-added reminder email after = 7
         * Eligible Payment Options = “Buy Now”
         * Support Email = Can.eCon@xerox.com
         * Support Phone Number = 8668524352
         * Remove / Re-add Grace Period = 14
         * Device Purchasing Enabled = No
           + Send Device Not Connected Email = NA
           + Threshold Days = NA
           + Number of Repeats = NA
           + Repeat After Days = NA
         * All other configuration can use default values
   2. Programs -> Program Definition -> T & C
      1. Upload End User T&Cs for new program in English and French
         * Note: Partner T&Cs are not required
   3. Programs -> Program Definition -> Notifications
      1. Configure System, Partner, and Customer notifications for new program in English and French
   4. Programs -> Program Definition -> Help Docs
      1. Upload Customer and Supplies Assistant Help Docs for new program in English and French
         * Note: Partner Help Doc is not required
   5. Programs -> Program Definition -> Identify Partner Reports
      1. Select Partner reports for new program
         * Note: Can use same reports as selected for the US Shop Xerox program
   6. Programs -> Models and Parts -> Eligible Models
      1. Add applicable models and default part overrides for new program
   7. Programs -> Models and Parts -> Consumable Part #
      1. Add applicable consumable parts for new program
   8. Programs -> Models and Parts -> Consumables and Thresholds
      1. Configure consumable and threshold levels for new program
   9. Programs -> Loyalty Benefit Configuration -> Loyalty Message
      1. Configure service loyalty messages for new program in English and French
   10. Programs -> Loyalty Benefit Configuration -> Loyalty Thresholds
       1. Configure service loyalty thresholds for new program
   11. Programs -> Add Partner
       1. Define a new Partner
          * Partner ID = “SXCAN”
          * Company Name = “Shop Xerox Canada”
          * Address Line 1 = “20 York Mills”
          * Address Line 2 = “Suite 500”
          * City = “Toronto”
          * Country = “Canada”
          * Province = “Ontario”
          * Postal Code = “M2P 2C2”
          * Language = “English”
          * Partner URL = “www.shop.xerox.ca”
          * Reseller Type = “CANSTR”
          * User ID = “sx\_can\_admin”
          * First Name = TBD
          * Last Name = TBD
          * Email = TBD
          * Office Phone = TBD
          * Program = “Shop Xerox Canada – Xerox eConcierge”
   12. Accounts -> Users
       1. Create additional users as needed
3. Questions
   1. Open
      1. Will there be different support details (email and phone number) for the Shop Xerox program versus the VAR program in Canada?

**Answer:** TBD

* + 1. Will there be any additional models, consumable categories and/or consumable parts enabled for the Shop Xerox program versus the VAR program in Canada?

**Answer:** TBD

* + 1. Will any updates to the End User T&Cs be needed (versus what is used in the US)?

**Answer:** TBD

* + 1. What admin details should be used to define the Partner?

**Answer:** TBD

* + 1. Is there any reason (from a technical perspective) that the existing “CANSTR” reseller type could not or should not be used?

**Answer:** TBD

* 1. Closed
     1. None

### Partner Portal

1. UI Changes
   1. Preferences -> Branding
      1. Enable ability to configure and preview branding details (Company Logo, Company Display Name, Header Color, and Store Theme) for the Partner
2. UI Configuration
   1. Setup Wizard
      1. Account
         * Company Name = “Shop Xerox Canada”
         * Company Website (English) = www.shop.xerox.ca/en/
         * Company Website (French) = www.shop.xerox.ca/fr/
         * Support Email = TBD
         * Support Phone Number = TBD
         * Hardware Service Company Name = TBD
         * Hardware Service Company Phone Number = TBD
   2. Preferences -> Branding
      1. TBD
3. Questions
   1. Open
      1. Is there any need to update the marketing collateral links shown on the last step of the Partner setup wizard?

**Answer:** TBD

* + 1. What support details should be configured for the Partner?

**Answer:** TBD

* + 1. What branding details should be configured for the Partner?

**Answer:** TBD

* 1. Closed
     1. Are there any issues with the Part Offering setting for the Partner?

**Answer:** No. As per previous implementation, NP partners, including “CANSTR” types, default to “OEM Only” at time of creation. This should be fine unless there is a decision made to offer replacement parts for the Shop Xerox Canada program.

### Customer Portal

1. UI Changes
   1. Self Registration
      1. Change “State” to “Province”
      2. Change “Zip Code” to “Postal Code”
      3. Remove “Zip+4” field
      4. Update validation logic and messages to align with above changes
   2. Account Menu -> Edit Company
      1. Change “State” to “Province”
      2. Change “Zip Code” to “Postal Code”
      3. Update validation logic and messages to align with above changes
   3. Account Menu -> Add/Edit Location
      1. Change “State” to “Province”
      2. Change “Zip Code” to “Postal Code”
      3. Remove “Zip+4” field
      4. Update validation logic and messages to align with above changes
   4. Account Menu -> Set Up Email Notifications
      1. Remove display of following notifications
         * Shipment Sent
         * General Status and Notifications
         * Problem with Order
   5. Other
      1. Show “Xerox eConcierge” branding instead of “eConcierge powered by Xerox” branding
         * Note: This should be done for all Customer Portal pages, including both the main pages and other pages such the registration and download pages
2. Questions
   1. Open
      1. None
   2. Closed
      1. None

### Supplies Assistant

1. UI Changes
   1. Other
      1. Show “Xerox eConcierge” branding instead of “eConcierge powered by Xerox” branding
         * Note: This should be done for all Supplies Assistant screens, including the splash screen
2. Questions
   1. Open
      1. None
   2. Closed
      1. None

## Other Requirements

### Notifications

1. No changes are expected at this point
   1. Note: There may be some localization effort required to accommodate content differences in notification content between the VAR program and Shop Xerox program in Canada, but this would not require any development work
2. Questions
   1. Open
      1. None
   2. Closed
      1. None

### Reports

1. No changes are expected at this point
2. Questions
   1. Open
      1. None
   2. Closed
      1. None

### Integration

#### **Shop Xerox**

1. Trailblazer -> Shop Xerox Canada (Magento)
   1. Shopping Cart Transfer
      1. HTTP post of shopping cart details should be done in the same was as currently done for the Shop Xerox US program with one change needed
         * Separate Shop Xerox endpoints should be used for the post, dependent on whether the order is for an English customer or a French customer
           + Both endpoints should be configurable in the X\_TB\_CONFIGURATION table
2. Shop Xerox Canada (CDW) -> Trailblazer
   1. Order Confirmation
      1. No changes should be needed
   2. Order Cancelation
      1. No changes should be needed
   3. Order Shipment
      1. No changes should be needed
   4. Note: Above assumes that CDW will be able to follow the exact same process for sending feeds for Canada orders as is currently done for US orders
3. Questions
   1. Open
      1. What are the Shop Xerox endpoints to use for the Shopping cart transfer (post) in TEST and PROD?

**Answer:** TBD

* + 1. Should new (different) web service credentials be created for use by CDW for Canada orders?

**Answer:** TBD. Note that this may involve some discussion with the CDW team to understand whether the feeds we get from them will be part of or separate from the equivalent feeds for the Shop Xerox US program.

* + 1. Will the CDW order numbers use for Canada orders be distinct from those used for US orders?

**Answer:** TBD. Note that, if not, the Trailblazer system should (in theory) still handle this fine due to the changes done some years ago with use of the SYS\_ORDER\_NUMBER field, but it would still be good to validate this assumption.

* 1. Closed
     1. None

#### **Service**

1. It is currently expected that the integration with the OUT service system will be the same as what is done in the current eConcierge programs, so no changes should be needed other than validating that it is working as expected for the Shop Xerox Canada program
2. Questions
   1. Open
      1. None
   2. Closed
      1. None

## Functional Spec

N/A

## Wireframes

* Update existing Platform Portal, Provider Portal, and Partner Portal Wireframe documents as needed
* Update existing Customer Portal VBS documents as needed
* Update existing Supplies Assistant VBS documents as needed

## Approach Document

Development of new technical approach document(s) will be required for all impacted areas

## Configuration

See details in requirement sections above

## Open Questions

See details in requirement sections above