Brief - OTS

Marketing Collateral Ordering System

Diversey

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Objective & User Roles

🎯 Objective:
Centralized portal to streamline the ordering, approval, printing, and dispatch of marketing collateral (stickers & charts).

In simple words, we want an ecosystem like Amazon for Diversey where there will be sellers (printers), buyers or users (primarily Diversey sales team), logistics partner and Admins (2 accounts for Admin and 1 Super Admin)

👥 User Roles:
- Users (~50): Place orders, track status, view history
- Admins (2): Approve orders, access reports, manage catalog
- Super Admin (1): Full access, override controls, manage dashboard
- Printers: Access confirmed orders only
- Logistics: Access dispatch info & order details

Order Workflow & Notifications

🔄 Order Flow:
1. User places order (max 500 units per SKU, 150 KGs per order)
2. Admin approves (email to User, Printer, Logistics)
3. Challan mandatory after 3 orders
4. Only confirmed orders visible to Printer

📩 Notifications:
- Users: Email for each stage (placed, approved, dispatched, delivered)
- Admins: Daily digest of orders and every new order
- Printer/Logistics: Automated emails upon order confirmation
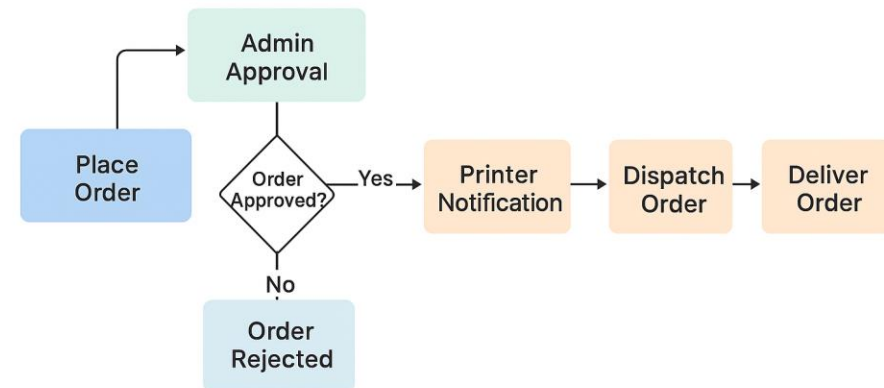
User Journeys

Detailed Journey Map – Users (~50 Employees)

Goal: Place orders for stickers and charts, track progress, stay compliant with approval protocols.

🏞️ **User Journey:**

- **Login** to the portal using credentials

- **Browse catalog** (non-customizable SKUs)

- **Place an order**
  - Can order multiple SKUs
  - Max quantity per SKU: 500, Weight limit per order: 150 KGs (Users will get prompts if either of the two exceed)
  - If 4th order, **system prompts for challan upload for previous orders**

- **Wait for Admin approval**
  - No action possible until approved

- **Receive email notification** upon:
  - Order approval or rejection
  - Dispatch confirmation
  - Delivery confirmation

- **Track order status** in dashboard

- **Search** for particular orders with order ID

- **View order history** with downloadable summaries

Detailed Journey Map – Admin (2 Persons)

Goal: Approve or reject orders, manage catalog, generate reports, place orders, upload artworks, manage users and suppliers, createnew login IDs

🏔️ **Admin Journey:**

- **Receive new order approval request –** Both admins receive emails with details of the order and option of approval along with link to the portal

- **Login** to portal

- **Dashboard** shows pending orders

- **Approve or reject**
    - System logs who approved (Approved by Sheetal or Approved by Komal mails to be triggered to both the admins)
    - Email triggered to:
        » User – in both cases if the order is approved or rejected
        » Printer – if the order is approved
        » Logistics Partner – after the order is approved by printer

- **Generate reports**
    - Weekly summary of all orders (approved, dispatched, delivered)
    - MIS reports business-wise and SKU-wise – format attached

- **Manage Catalog**
    - Add/edit/remove SKUs
    - Upload artwork/templates (along with printer)

- **Download reports** (Excel/PDF)

Detailed Journey Map – Super Admin (1 Person)

Goal: Governance & override. Not involved in daily ops.

🏔️ **Super Admin Journey:**

- **Login** to full-access dashboard

- **Monitor** all orders & actions across roles

- **Override Admin decisions**, if needed

- **Access advanced reports**

  – Filter by business unit or SKU

  – Track Admin activity

- **Does not receive day-to-day emails**

  – Only uses dashboard/reporting

Detailed Journey Map – Printers

Goal: Receive confirmed orders, print, update status

🏔️ **Printer Journey:**

- **Login** to portal (restricted access)

- **View only approved orders**
  - Includes order details and artwork

- **Print and pack items**

- **Update dispatch status**
  - Mark as dispatched in system
  - Triggers email to the courier partner who picks up the order

- **Upload proof if required** (e.g. dispatch photo, label)

Detailed Journey Map – Logistics Partner

Goal: Manage pickup & delivery after printer dispatches.

🏔️ **Logistics Journey:**

- **Login** to dispatch dashboard

- **View confirmed & packed orders**
  - Includes delivery address and weight/volume info
  - Order tracking ID to be shared with the users and should be visible on the portal to be accessed by users and admins
  - The user login to reflect order dispatched once marked by the courier partner

- **Mark items as delivered**
  - Delivery date & remarks entry

- **Trigger system email** to User as dispatch confirmation

- **Access dispatch history**
  - For audit or tracking

Miscellaneous

- Stock quantity should be visible to Admin only

- Stock shortage reminders should be sent to vendors via email notification

- The search function to be there in 'All Orders' section for looking up orders through order IDs and name of the person who has placed the order

- MIS report format – **Business Unit / Division | Username | User Email ID | Order Qty | Shipment address | Shipment charge | Printing cost | Ordered Date | Dispatch Date | Order Status | Delivery Date | Approved By | Remarks / Notes**

- Admin should be able to view all challans approved by users

- Challans should be marked as Pending/To Be Approved for visibility

- Super Admin feature to be implemented in Phase 2

- Printing cost for each SKU to be visible to the Admin

Points to be noted

Maintenance & Bug Fixes: Ensure smooth functioning of the portal and fix issues as they arise.

Support SLA: Critical issues to be resolved within 24 hours; minor issues within 1–2 business days.

Training & Documentation: Provide user manuals and onboarding training for users, admins, and the super admin.

Backup & Data Recovery: Regular data backups with clear recovery timelines in case of system failure.

Usage Reports & Analytics: Monthly reports on order volumes, user activity, and system performance.

Enhancement/Change Requests: Defined process for requesting new features or updates, with time/cost estimates.

Thank You