

## **Order Notes - Change Request**

Project Info		
Project Name	ZenBasket	
Project Type	Own product	
CEO Mr. Amalraj Devasagayam	VP Mrs: Yedse Janury	Project Manager Mr. Andrew Rayan
Business Analyst Info		
Requirement source	Hepzibah from BA Team #22438	
Product owner	Manju Arasu	
Module owner	Sorna Latha	
Priority	High	
Researched By	Hepzibah	
Menu Name	Admin - Order details page	
CR No	ZB-CR-OR-2024-001(Version)	
Date of Request	12/09/2024	
Research Source:	Competitor analysis (Ecwid & Dukaan)	
Research Status	Completed	
Review status	Approved	
Assignee	Pavithra - Senior Software developer	
Milestone	16th	
Implemented status	In progress	

<b>Environment</b>	DEV UAT PROD
<b>Assess the impact</b>	Enhance and optimise the process for future work by implementing for updating and saving logs in order notes. 002-(Version)

### **Audience:**

ZenBasket's Customers- Client or Admin or You or users

Client or Admin Customers- Customers

### **Requirements:**

- Need to change order notes label into staff Notes
- Need to change customer provided notes into customer notes
- In order notes, we need to remove multiple add options
- The added order notes in the single order details page, should be shown in the quick edit popup vice versa

### **Business Objective:**

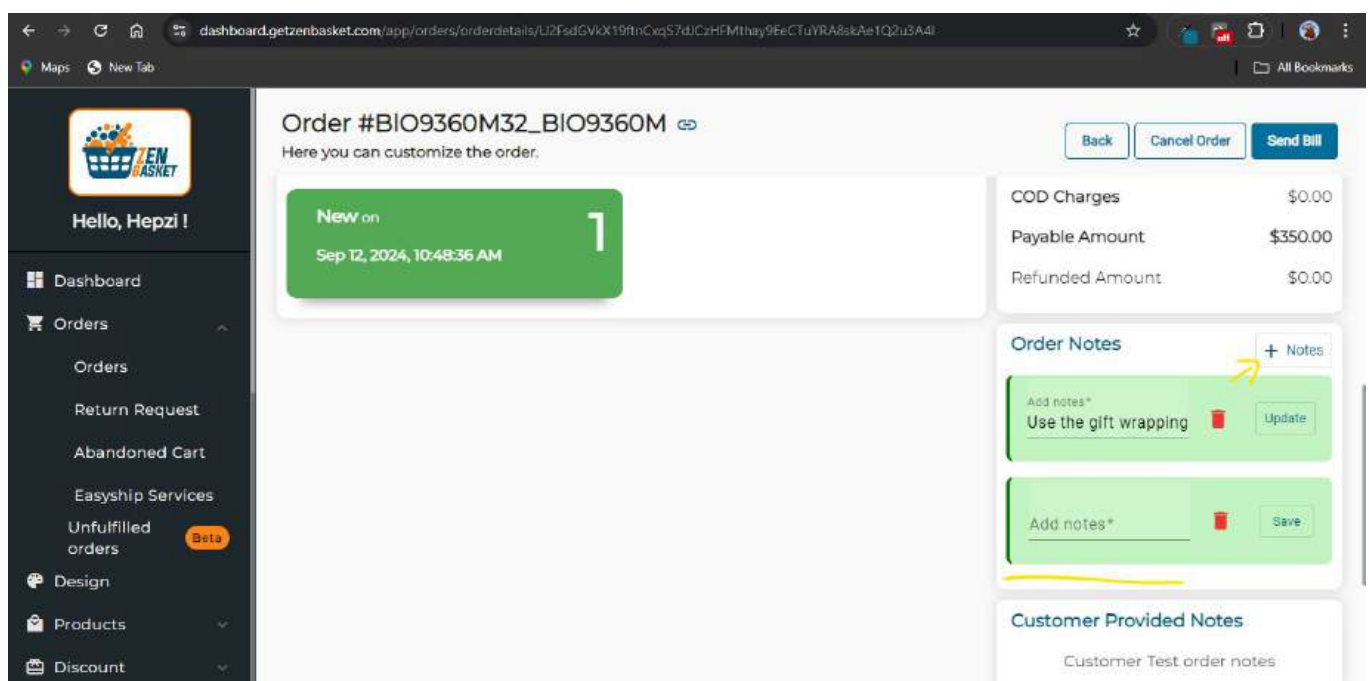
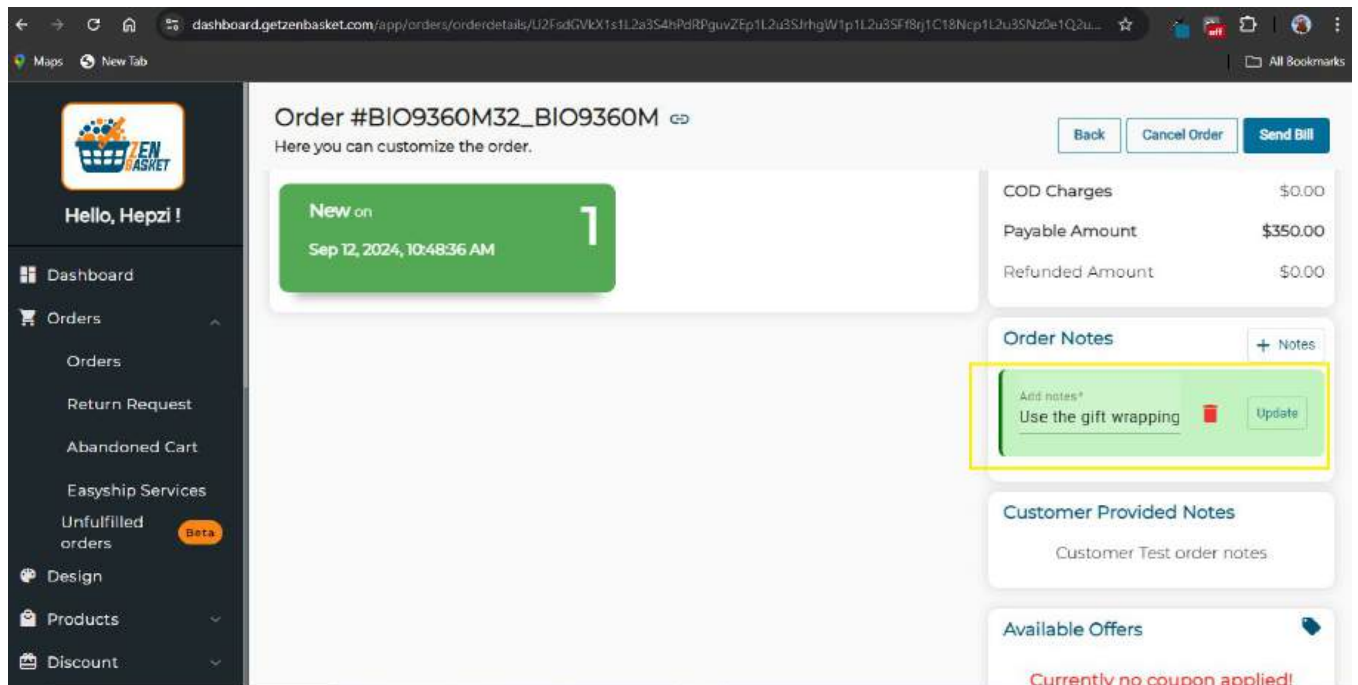
The company requires the Order Notes features to enhance internal communication, improve efficiency, and streamline order processes.

- By distinguishing between "Staff Notes" and "Customer Notes," the features aims to reduce confusion among staff members
- Ensuring that staff notes are visible in both the admin order details page and the quick edit popup creates a seamless experience for users
- Streamlining the note-taking process by restricting multiple staff notes per order will help reduce clutter and eliminate redundancy.
- So this result in a more streamlined, efficient, and user-friendly order details page

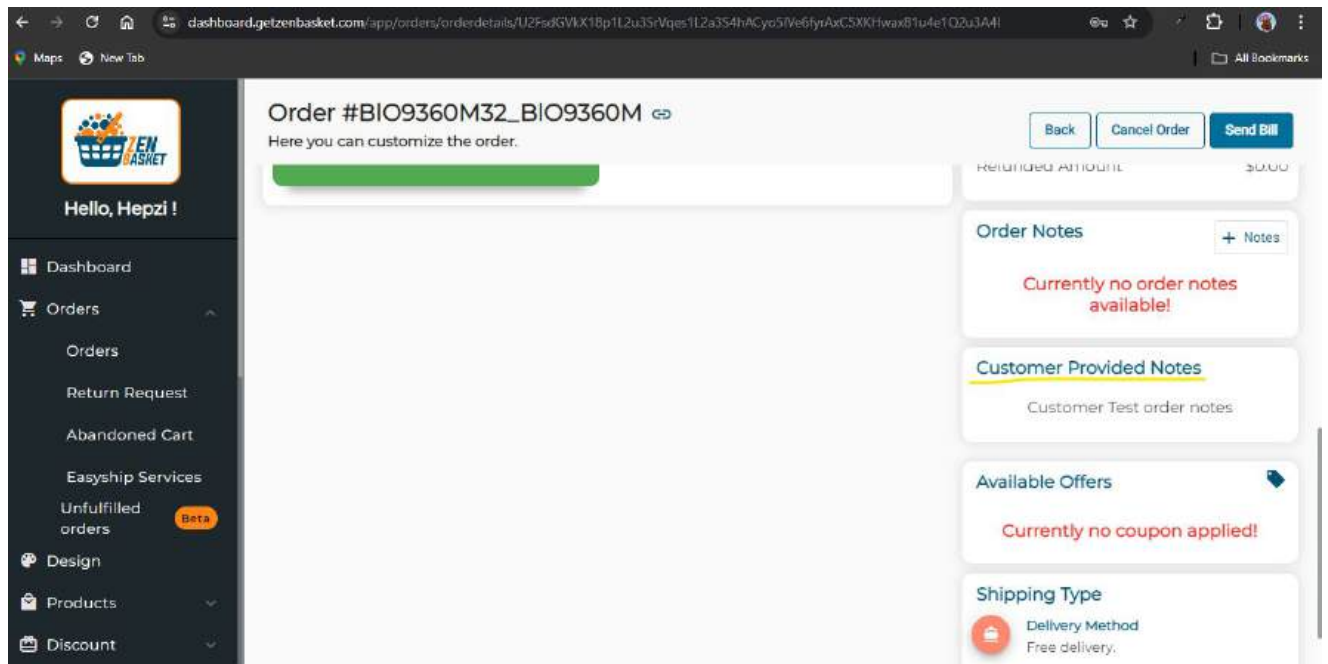
## Existing Feature:

The current order notes functionality displays notes independently on both the Order Details Page and the Quick Edit Popup within the Order List Page, with no synchronisation or link between them.

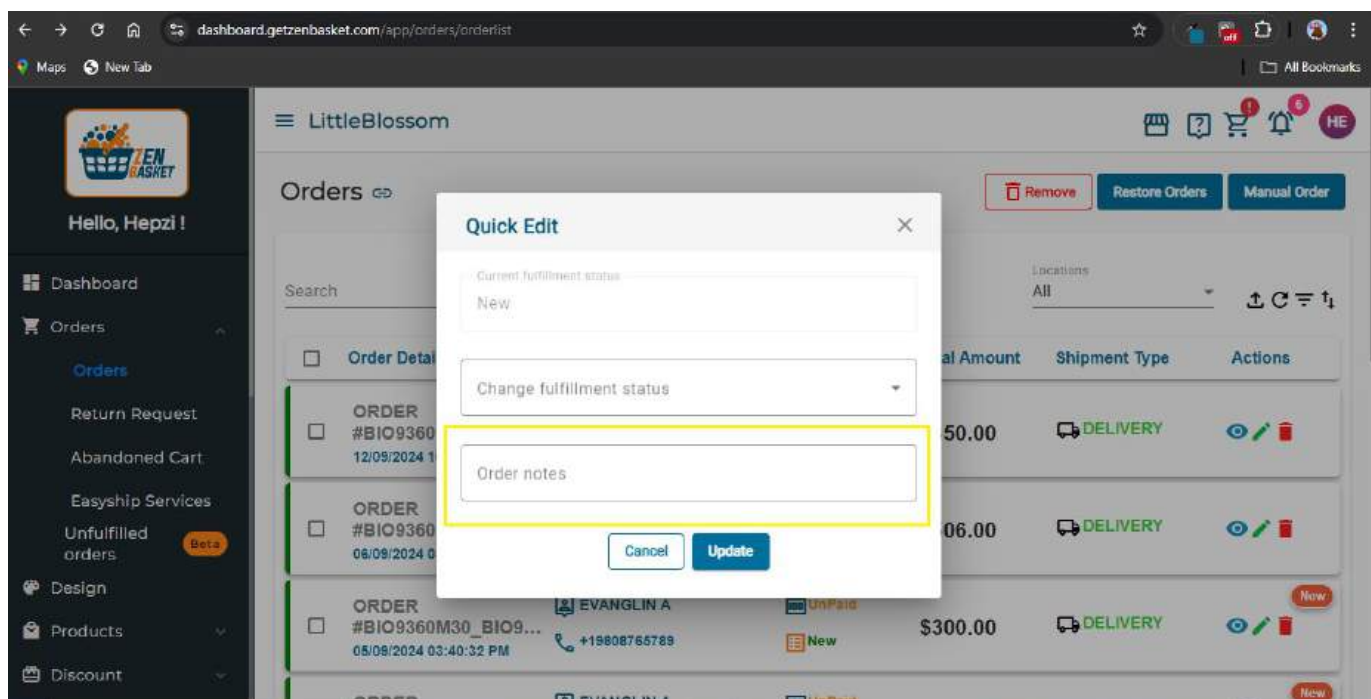
Order details page,



when the label for the existing feature is displayed as "customer provided notes."



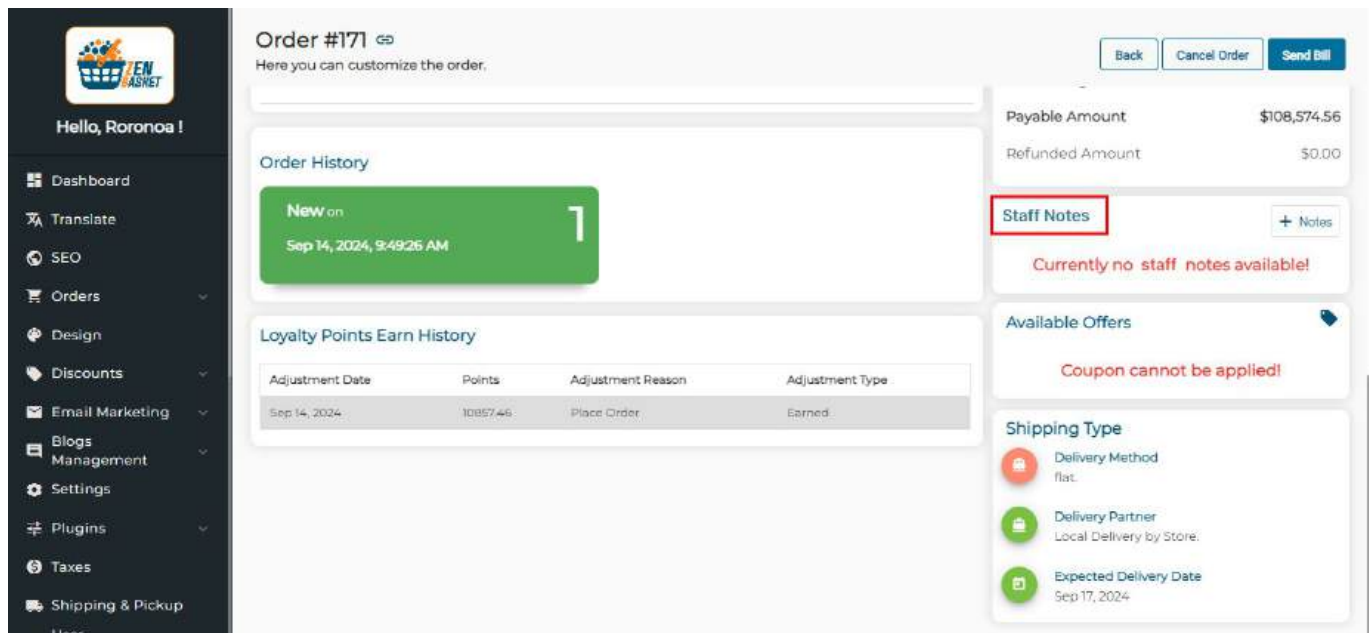
Order list page quick edit popup,



**Change Request Features:**

**Req 1:** Need to change order notes label into staff Notes:

**Notes:** Staff notes used for internal purposes only and can be edited by staff with the appropriate role-based permissions.



**Benefit:**

Staff notes are more convenient to order notes.

**Req 2:** Need to change customer provided notes into customer notes:

Change the label "customer provided notes" to "customer notes" for clarity, as we followed in storefront,

Zenbask...

Shop from

Konoha...

Quick Access

All Products

Search in All Products

Hello,

jp kv

Any Queries?

Contact Us

More

EN

Shipping & Delivery Methods

☒ flat - \$33,175.56  
Description : flatss

☐ free - FREE

☐ qqqqqq  
Not Applicable for this subtotal

Grand Amount

\$108,574.56

Amount to pay

\$108,574.56

You will earn 10857.46 loyalty points upon placing this order!

Customer notes

Please leave the package at the front door if no one is home.

Confirm to Proceed

or

Continue Shopping

Hello, Roronoa !

Dashboard

Translate

SEO

Orders

Vamaship Services

Unfulfilled Orders

Abandoned Carts

Return Request

Square POS orders

Shippo Services

Routing

AfterShip Services

Order #170

Here you can customize the order.

New on

Sep 14, 2024, 9:17:02 AM

1

Loyalty Points Earn History

Adjustment Date	Points	Adjustment Reason	Adjustment Type
Sep 14, 2024	10857.46	Place Order	Earned

Staff Notes

Currently no staff notes available!

Customer Notes

Please leave the package at the front door if no one is home.

Available Offers

Coupon cannot be applied!

Shipping Type

Delivery Method

flat.

Delivery Partner

Local Delivery by Store.

Expected Delivery Date

Sep 17, 2024

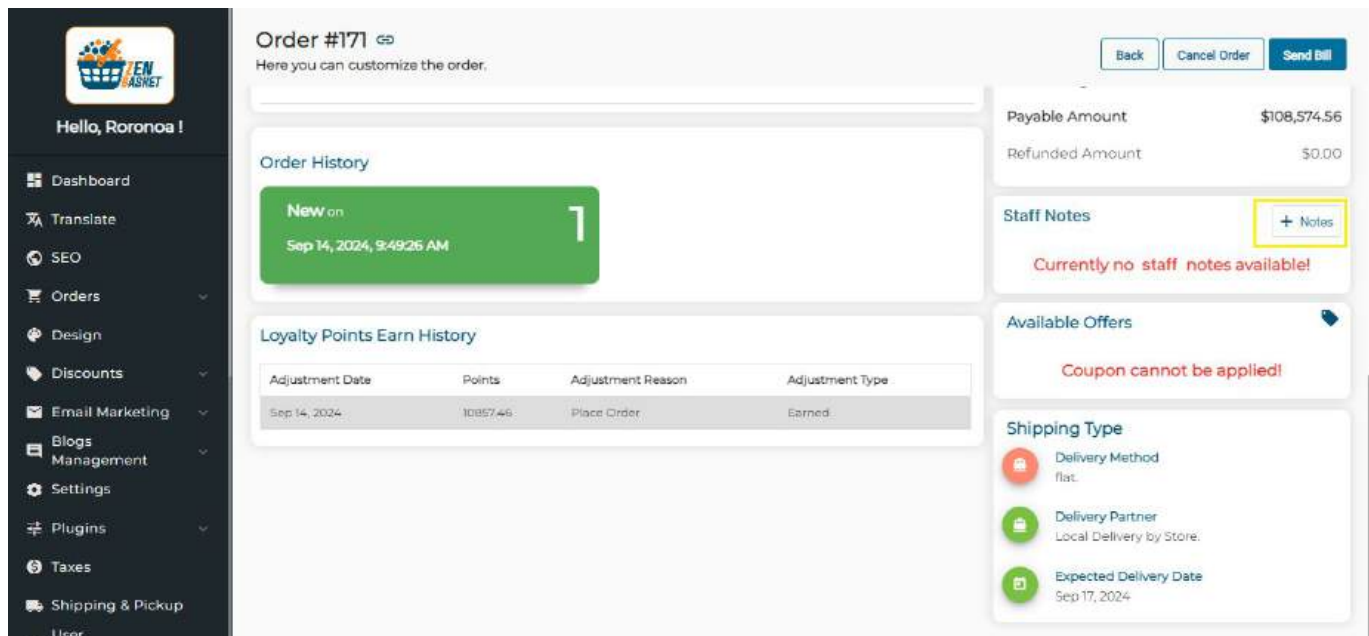
## Benefit:

The label "Customer Provided Notes, Since it essentially refers to the same information, it should be simplified to "Customer Notes."

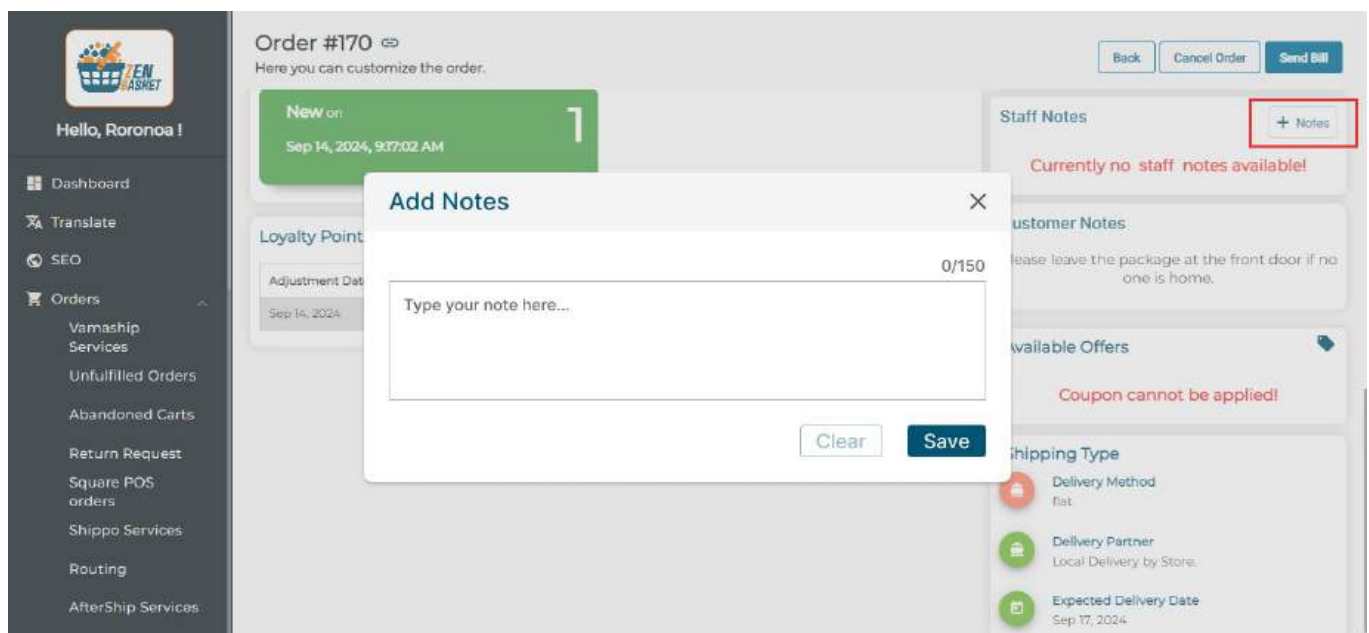
### Req 3: In order notes, we need to remove multiple add options:

The option to add multiple notes for the same order should be removed (i.e., users cannot add multiple notes).

Users should have the ability to save or clear the staff note.



When we remove multiple order notes to add one single description fields with character counts,



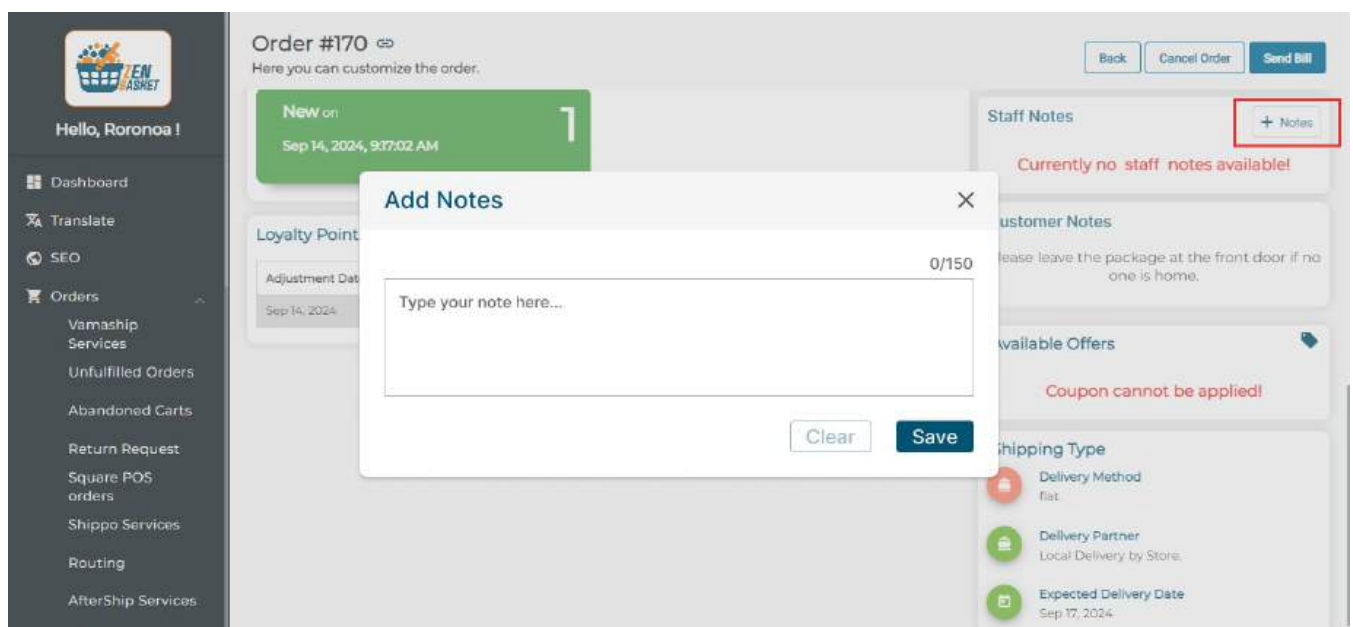
**Benefit:**



when multiple order notes options are added, the order notes do not display in the quick edit popup fields. Therefore, we will limit to add one staff note, similar to competitive sites like Ecwid and Dukaan, which also provide only one staff notes option."

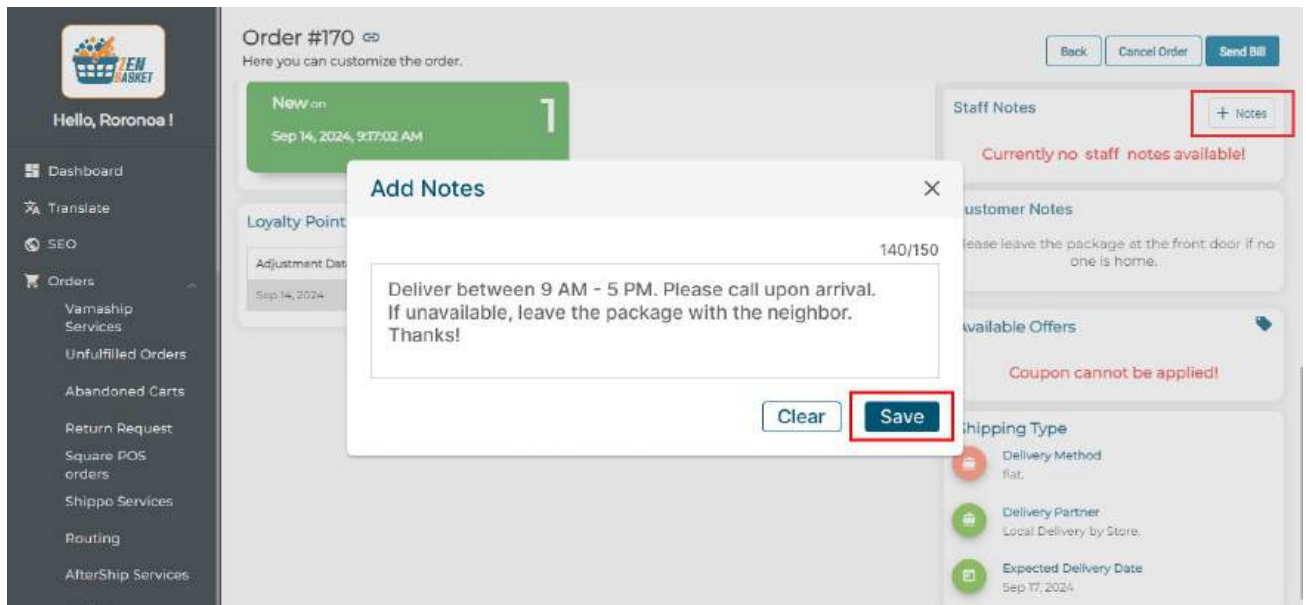
**Req 4 :** Order notes customization in the single order details page, should be given in the quick edit popup vice versa:

### Single order details page:

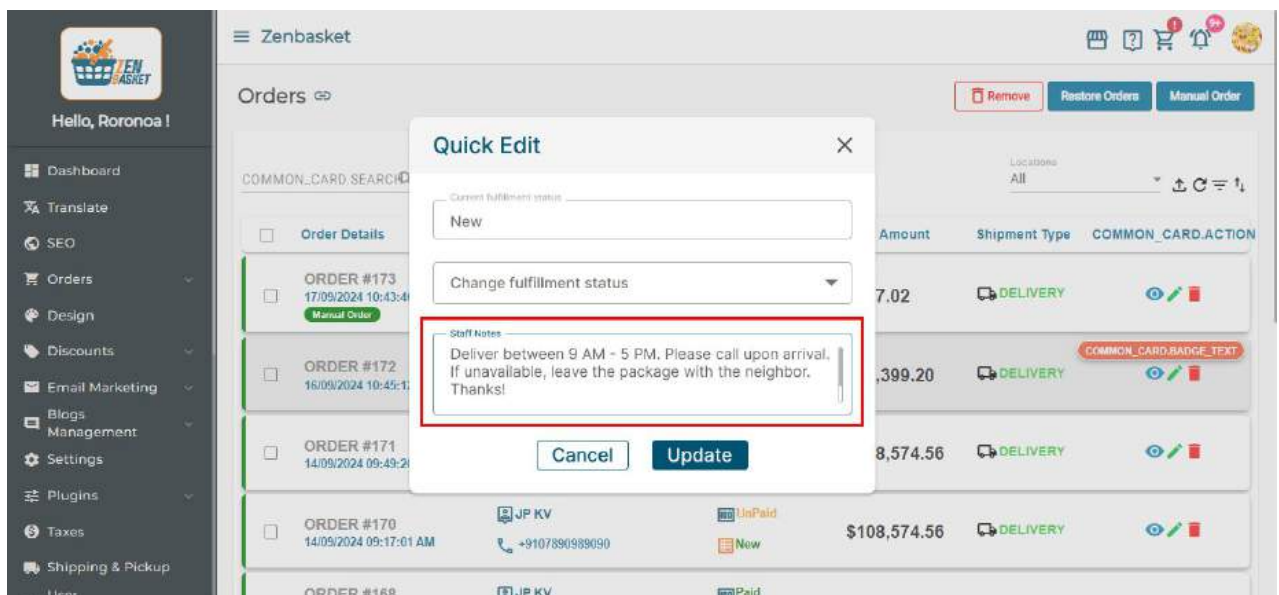


When click add notes, display the popup add staff notes content descriptions on the add notes popup fields

Saved order notes are displayed consistently on both the order list page and the quick edit popup, ensuring seamless visibility across both views,



Same details reflected in the quick edit popup,



When order notes are edit the updated on the details page, the changes will automatically reflect in the quick edit popup on the order list page,

Hello, Roronoa !

Dashboard

Translate

SEO

Orders

- Vamaship Services
- Unfulfilled Orders
- Abandoned Carts
- Return Request
- Square POS orders
- Shippo Services
- Routing
- AfterShip Services

Order #170

Here you can customize the order.

New on

Sep 14, 2024, 9:17:02 AM

1

Loyalty Points Earn History

Adjustment Date	Points	Adjustment Reason	Adjustment Type
Sep 14, 2024	10857.46	Place Order	Earned

Staff Notes

Deliver between 9 AM - 5 PM. Please call upon arrival. If unavailable, leave the package with the neighbor. Thanks!

Customer Notes

Please leave the package at the front door if no one is home.

Available Offers

Coupon cannot be applied!

Shipping Type

Delivery Method  
flat.

Delivery Partner  
Local Delivery by Store.

Expected Delivery Date  
Sep 17, 2024

Back

Cancel Order

Send Bill

Edit Notes

140/150

Gift order – please do not include invoice or pricing details in the package.

Clear

Save

Hello, Roronoa !

Dashboard

Translate

SEO

Orders

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Delivery Method  
flat.

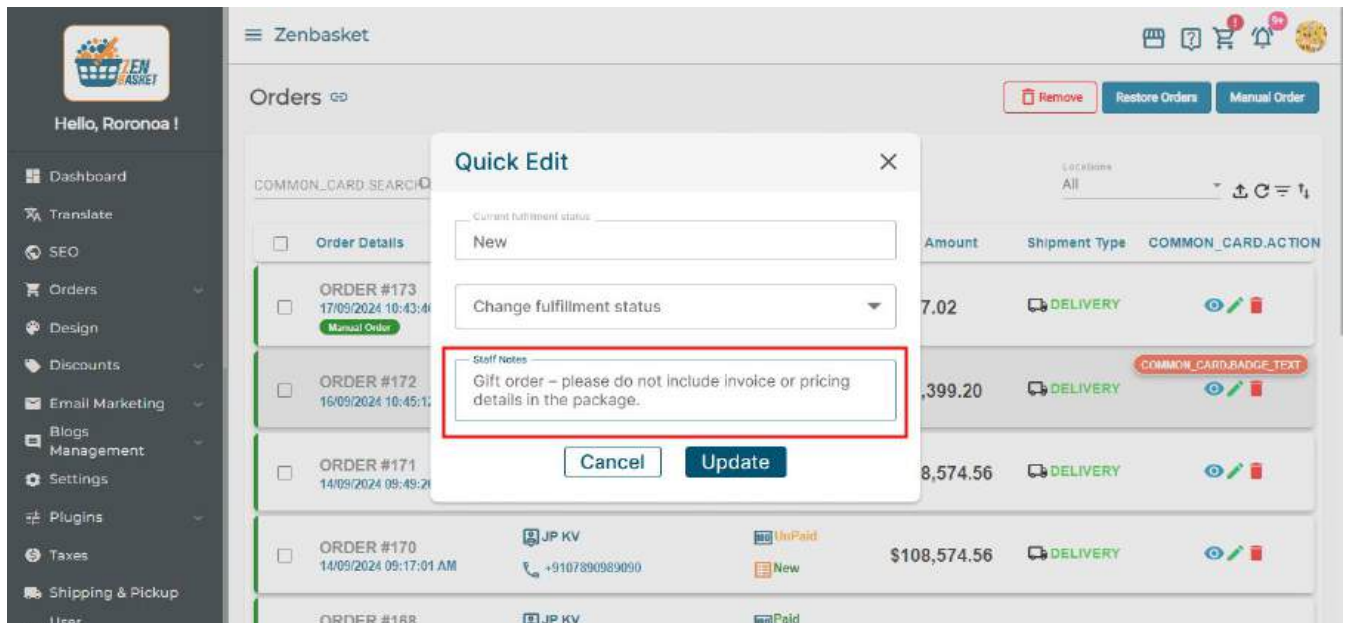
Delivery Partner  
Local Delivery by Store.

Expected Delivery Date  
Sep 17, 2024

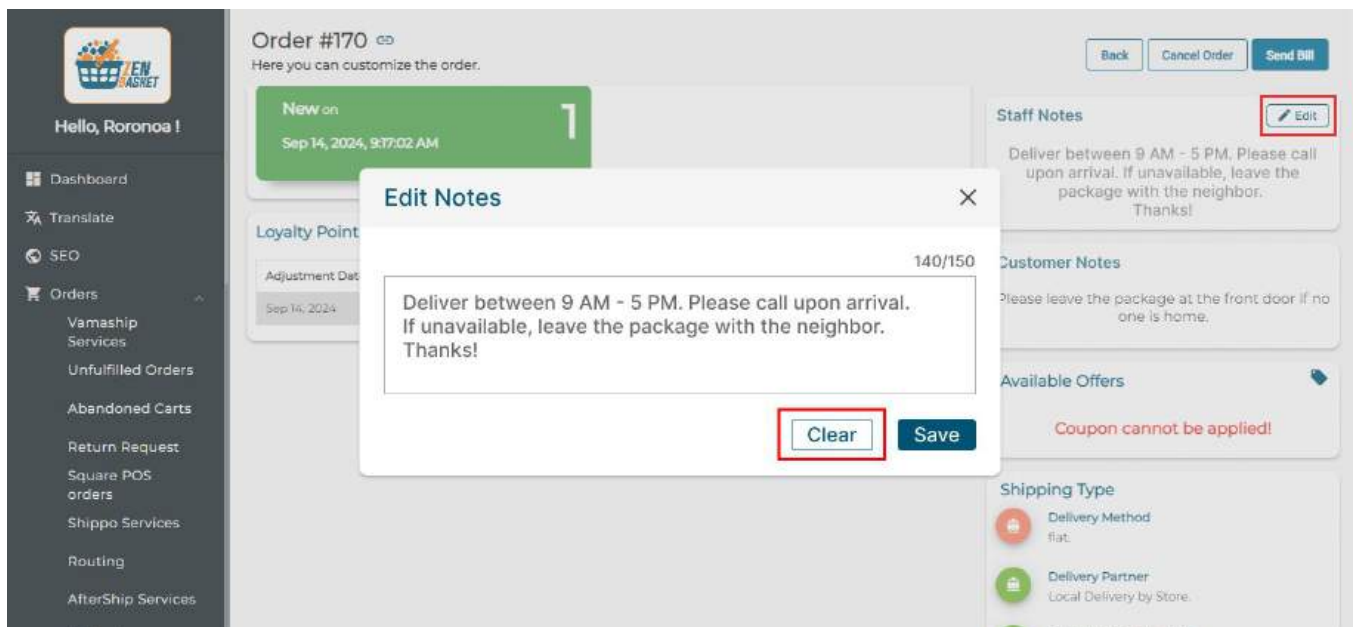
Back

Cancel Order

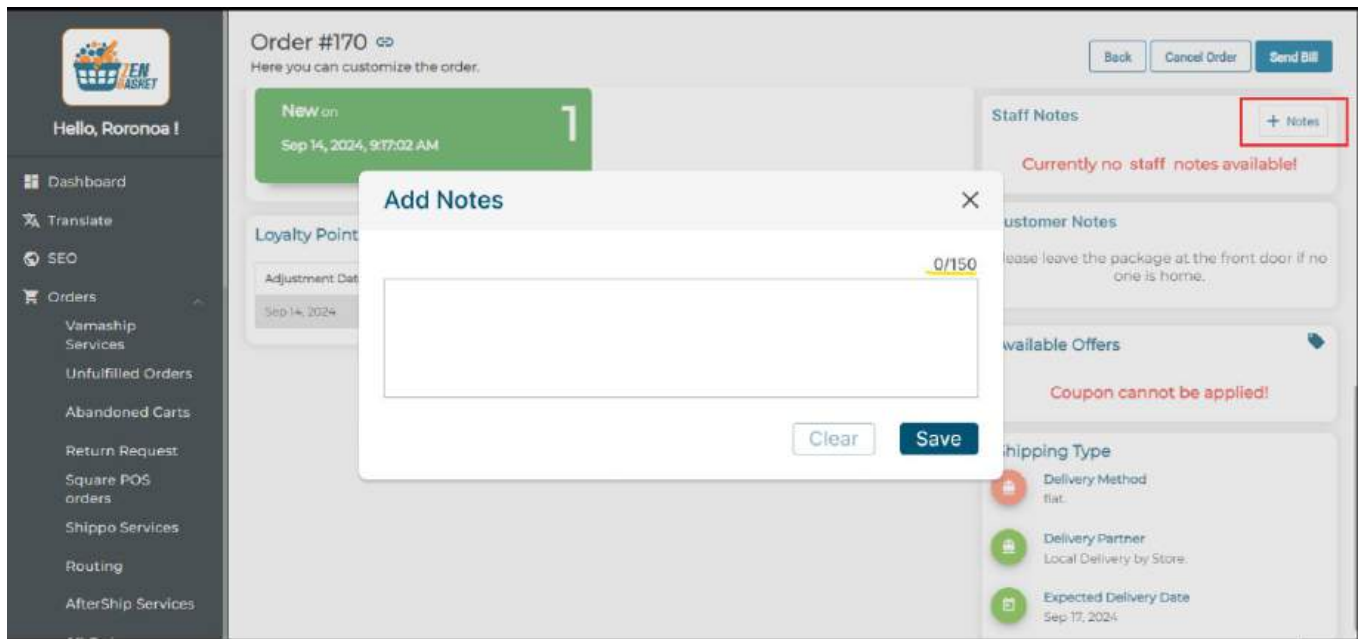
Send Bill



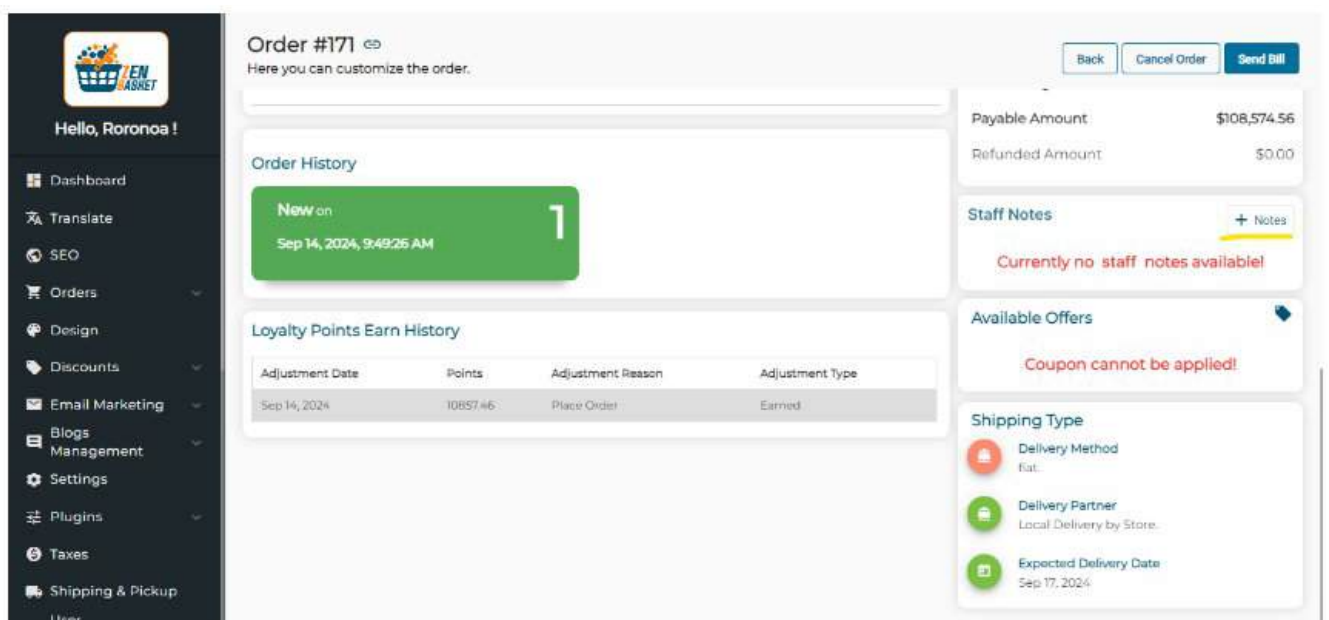
If the order notes are clear, the order notes contents will be removed. A new option to add order notes will then become available, allowing users to add fresh notes,



When the "Clear" button is clicked, it is typically used to reset or clear the input fields in the description. the character count should reset to zero, Once the input is cleared and the "Save" button is clicked,

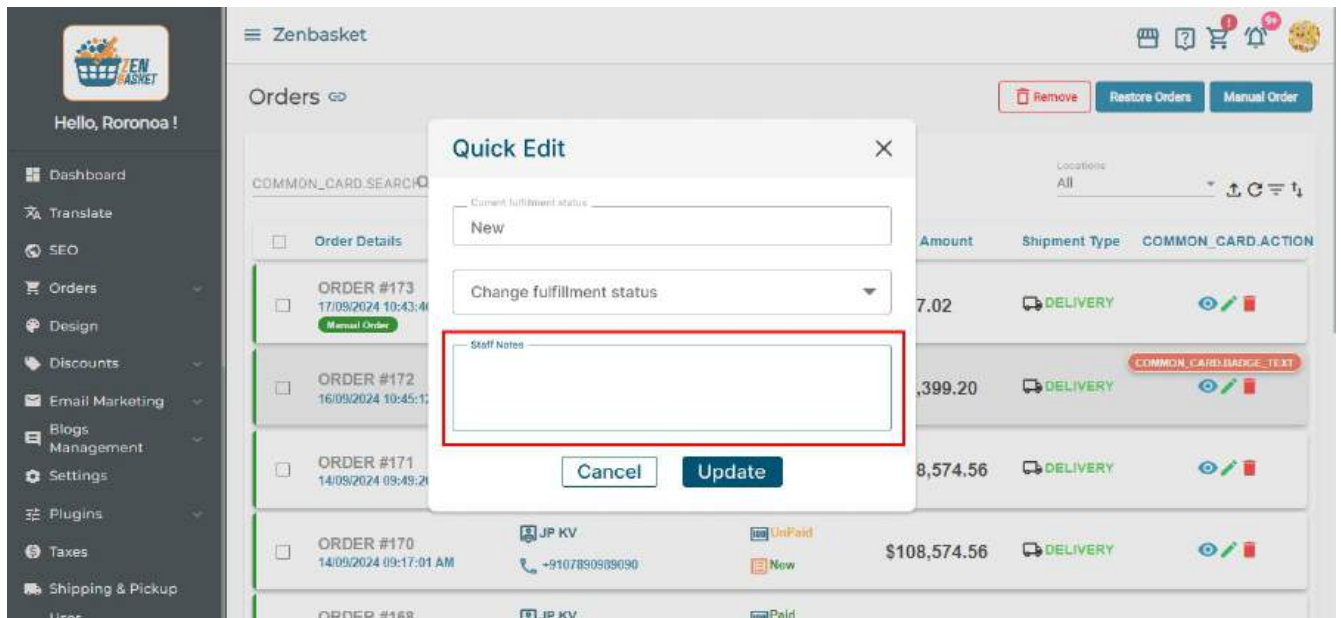


The staff notes can be removed, again add new staff details,



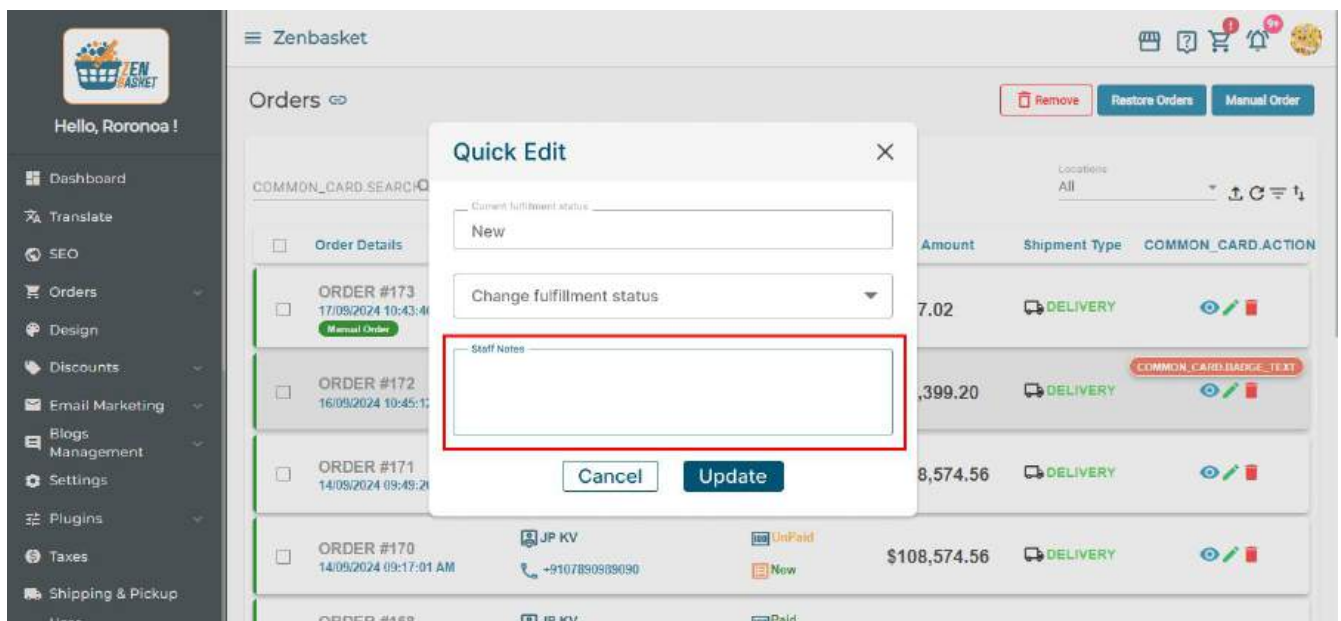
The order notes should be removed from the quick edit popup on the order list page vice versa

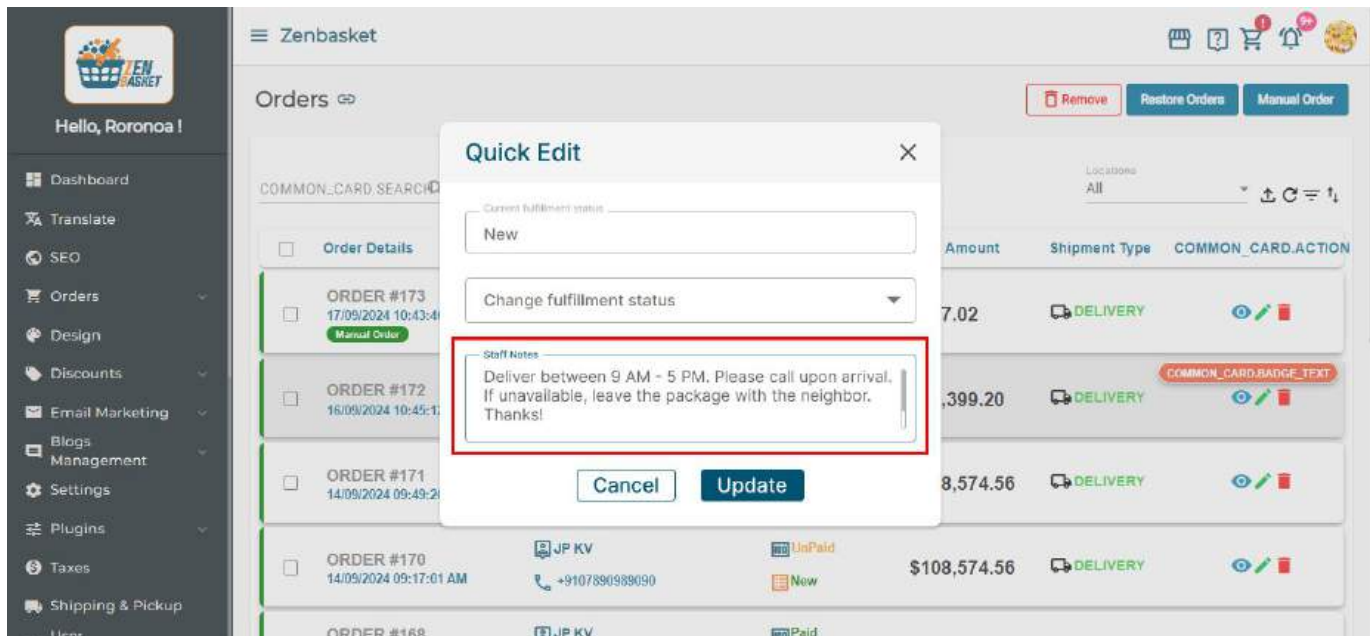




## Order list page Quick Edit:

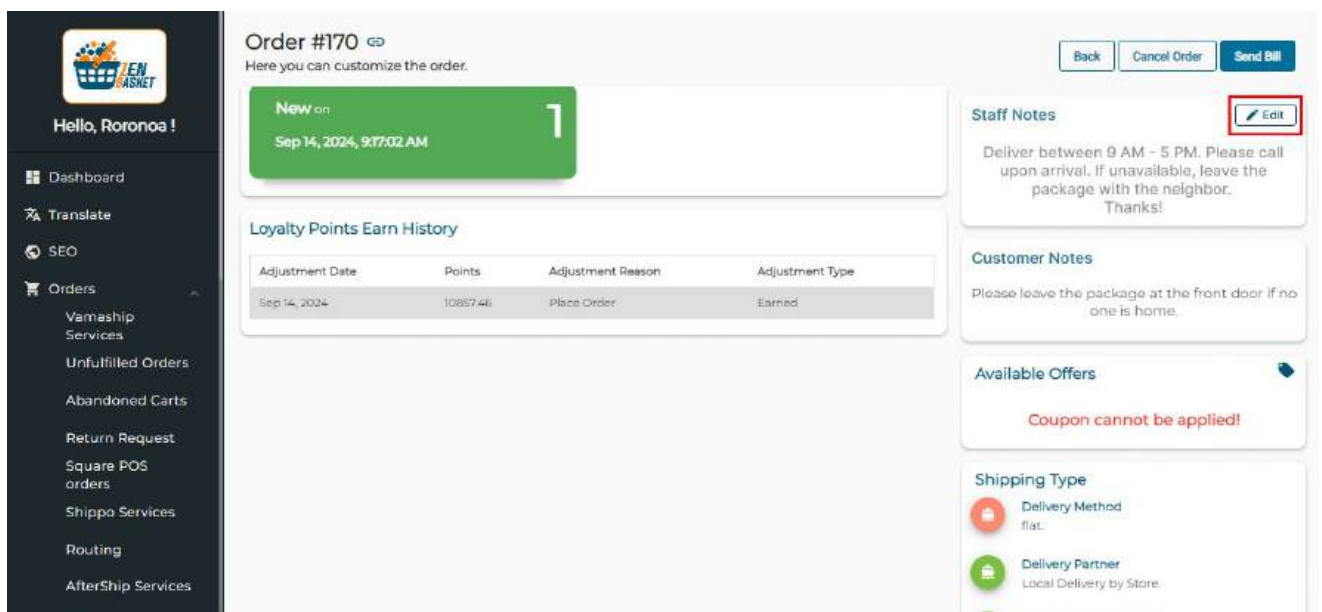
When Staff notes are added through the quick edit popup, they will be directly displayed and updated on the single order details page, reflecting the latest status immediately,

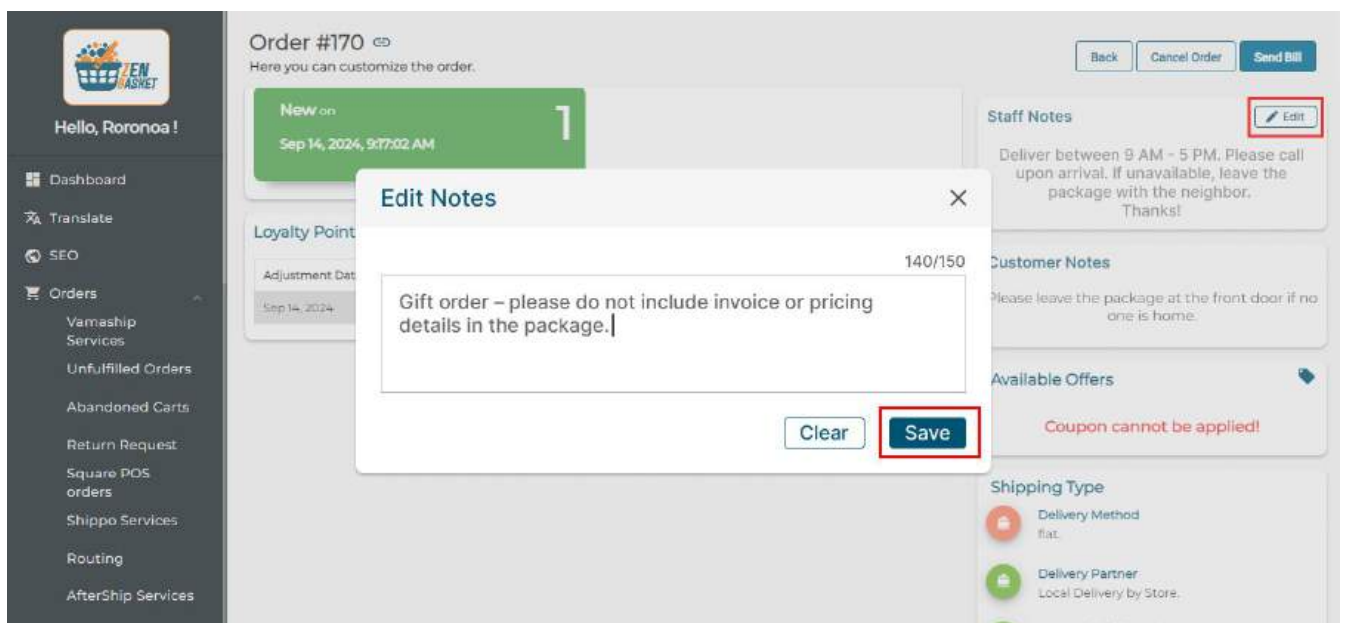
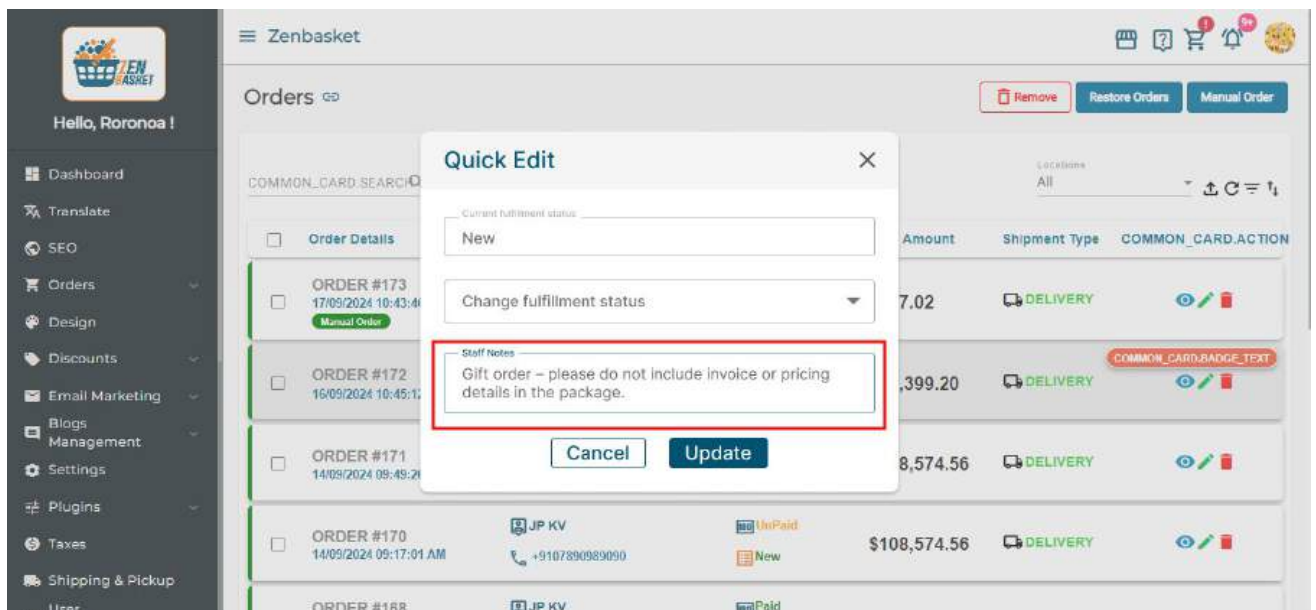




When staff notes are added through the Quick Edit option, they are reflected on the Single Order Details page with an edit option.

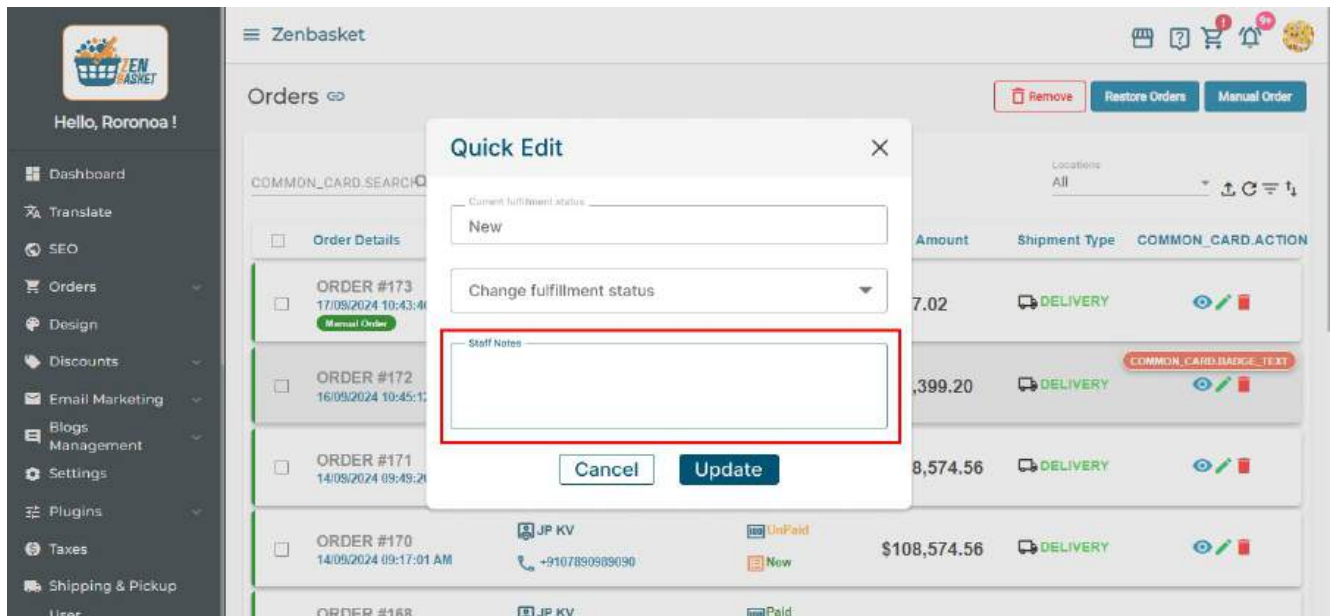
You can edit and update the contents of the order notes on either page, and the changes will sync accordingly.



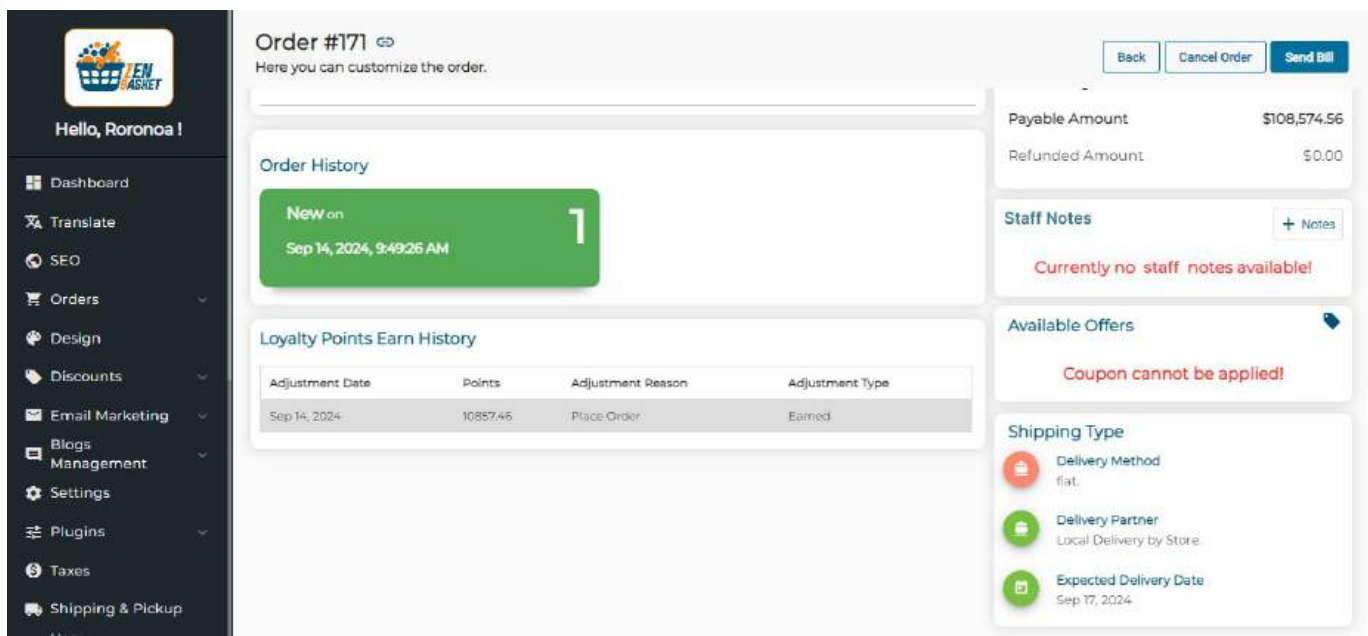


When staff notes are clear from the quick edit popup on the order list page, the corresponding order notes will also be deleted from the single order details page.





**Note :** For Quick Edit Staff Notes, display the following validation message after **255 characters**: "Staff notes should not exceed 255 characters. (Because of multiple order notes migration)"



## Benefits:

- Staff may need to consolidate or remove multiple order notes, and restricting the character limit can adding comprehensive details,
- No validation ensures that any number of notes can be added, making the system more user-friendly,

→ Improved efficiency when adding or editing order notes during fulfilment.

## Access the future implementation : Ver 2

### Activity Section:

Need to show activity Log for recent updates to the order notes:

- Need to show Exact date and time ,
- Need to show edited by (you or staff name)
- Need to show existing content and new content

Example :(Dukaan)

The screenshot displays the Dukaan web interface for an order. The browser address bar shows the URL: `web.mydukaan.io/orders/e666fc78-4990-44b9-bc60-3940bc4e5b2a`. The page header includes the Shoppersdelight logo and navigation links for Maps and New Tab. The main content area is titled "Order ID #16178125" with a status of "Accepted". A pink warning banner at the top states: "Payouts on hold - Top-up required. Your Dukaan Wallet balance is too low to view customer details and process payouts. Please add at least ₹15.97 credits to unlock order updates, resume payouts, and view customer details." Below this, there are links for "Learn more" and "Add credits". The order details section shows the order ID #16178125, the date and time "12 Sep 2024, 11:11 AM", and a "Receipt" button. The items list shows "2 Items": "Hershey's Milk Chocolate per packet" with SKU ID: 89797646672, priced at ₹75 each, totaling ₹150. The subtotal is ₹150, and the delivery charge is FREE. On the right, the "Activity" section shows a list of updates: "Notes updated" by you on 16/09/24, 03:16 PM, and three more updates on 16/09/24, 02:50 PM, 02:46 PM, and 02:45 PM. Each update includes a preview of the note content. An "Add note" button is located at the top right of the activity section.

