**High Level Scope – Ordering Process**

The high level scope of the first delivery is to provide the following functions:

1. Customer makes initial request;
2. Customer completes request (including bill of materials);
3. Amendment process;
4. A request is accepted (and scheduled);
5. A request is locked;
6. Request details can be printed for warehouse;
7. Request details can be exported to xls for order book;
8. Request details can be exported to xls for scourer;
9. Request details can be exported to xls for testing;
10. A number of reports are available against the requests.

**Scope Detail**

1. **Initial Request Process**

The customer (which may include Standard Wool) is able to make an initial request for processing (scouring; blending or cleaning). This initial request provides general details as listed below:

* Customer Name;
* Request Submission Date;
* Processing Type (scour, blend or clean);
* Date Required;
* Blend Type;
* Approximate Input Weight;
* Remarks.

On ‘submitting’ the order the scheduler is automatically notified by e-mail. The scheduler may then trigger (through force.com) a notification that the request has been received.

The customer may also choose to complete the order at the same time as submitting the initial request – see Complete Request Process.

1. **Complete Request Process**

The customer is able to complete the request - based on an initial request already submitted.

The customer adds the following details:

* A bill of materials. For each ‘part’ the following is specified:
  + Lot;
  + Number of Bales;
  + Kilos;
  + Description;
  + Where Lying.
* Estimated Yield;
* Low Fatty Matter;
* Match To Sample;
* Andar Wool Opener;
* Bleach;
* Picking;
* Pick For;
* Scour To;
* Certificate At;
* Packing;
* Bale Weight Required;
* Product Required By Date;
* Inspect Bulk Request Details;
* Special Instructions.

On ‘submitting’ the completed order the scheduler is automatically notified by e-mail. The scheduler may then trigger (through force.com) a notification that the request has been received.

1. **Amendment Process**

Requests may be amended by the customer or the scheduler (via warehouse?).

For each amendment:

* A notification is sent to the other party (i.e. customer or scheduler);
* A record is added to the amendment history.

The notified party may trigger (through force.com) a notification that the amendment request has been received.

The amending party may then trigger (through force.com) a response to the amendment request.

1. **Acceptance and Scheduling**

The scheduler is able to:

* Export a record of the request into a spreadsheet (order book format);
* Mark the request as ‘scheduled’;
* Add the following additional details:
  + TBC
  + TBC
  + .......
* Send a notification to the requester that the request has been scheduled.

1. **Lock Request**

The scheduler is able to ‘lock’ the request. Once locked the customer’s are not allowed to make any amendments to the requests. The scheduler may also unlock the requests.

1. **Exports and Printing**

Request details can be printed for warehouse;

Details TBC

Request details can be exported to xls for order book;

Details TBC

Request details can be exported to xls for scourer;

Details TBC

Request details can be exported to xls for testing;

Details TBC

1. Reports

Report definitions TBC

1. Alerts, Notifications and Reminders

Actions can trigger alerts; notifications and reminders. This section lists them in on e place. TBC

1. Roles and Permissions

Users will have specific roles with permissions that restrict their access to information / functions.

At least 4 roles will be required:

Customer;

Scheduler;

Management (for reports);

Administrator.

For the prototype a single role will be used for demonstration purposes.

**To Be Confirmed**

Items to be decided or discussed in prototype sessions.

* Confirmed list of initial request fields; field types and list values.
* Confirmed list of completed request fields; field types and list values.
* Roles – are there only 2 roles – customer and scheduler? Are warehouse or any other roles required?
* What can be provided in terms of an amendment history?
* Confirm notifications around amendment process.
* Agree format of export to xls for order book entry.
* Agree the fields that may be entered when the request is ‘scheduled’. Note: can these fields be added at any point in the process once the request has been submitted? Only available to scheduler.
* Is a notification required when the request is ‘locked’?
* Confirm templates for warehouse; scourer and test spreadsheets (confirm if spreadsheet export or print is more appropriate).
* Report definitions TBC.
* Alerts, Notifications and Reminders TBC.
* Agree required field and validations.