

Warehouse Support Model

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| **Created By:**  Phathiswa Gulwa | **Modified by:**  Phathiswa Gulwa |
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# Document Control

## Document History

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| --- | --- | --- |
| **Document ID** | **Revision Date** | **Change Reference** |
| **Version 0.1** | 19 March 2018 | Document Created |
| **Version 0.2** | 08 May 2018 | Document updated with feedback from the warehouse team |
| **Version 0.3** | 26 June 2018 | Document updated with additional requirements from channels |
| **Version 0.4** | 05 July 2018 | Document updated with additional requirements from EBU |

## Approval List

|  |  |  |  |
| --- | --- | --- | --- |
| **Person** | **Capacity** | **Signature** | **Date** |
| Quintus De Beer | GM: Consumer Supply Chain |  |  |
| Markus van der Westhuizen | Principal Consultant: Consumer Supply Chain |  |  |
|  |  |  |  |

## Distribution List

|  |  |  |
| --- | --- | --- |
| **Person** | **Organisation** | **Capacity** |
| Quintus De Beer | Consumer Supply Chain | GM: Consumer Supply Chain |
| Markus van der Westhuizen | Consumer Supply Chain | Principal Consultant: Consumer Supply Chain |
| Koena Mpati | BRC | Manager: BRC |
| Rakesh Nana | BRC | Key Account Manager: BRC |
| Carmen Van Heerden | BRC | Key Account Manager: BRC |
| Larry Padayachee | Owned, Branded Retail Channel | Senior Manager: Owned, Branded Retail Channel |
| John Mann | Indirect Telesales & On-Biller, Retail Channel | Senior Manager: Indirect Telesales & On-Biller, Retail Channel |
| Eschel Fransman | Retail Sales, Finance Management | Manager: Retail Sales, Finance Management |
| Belinda Vumendlini | Informal Channel | Sales Account Manager, Informal Channel |
| Marlin Marian | Solution Planning, EBU Client Services Dept | Supervisor: Solution Planning, EBU Client Services Dept |
| Peter Gettliffe | TPMO | Programme Manager: TPMO |

## Project Documentation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Document ID** | **Title** | **Revision Date** | **Author** | **Comments** |
|  |  |  |  |  |

## Reference Material

|  |  |  |  |
| --- | --- | --- | --- |
| **Title** | **Published by** | **Author** | **Revision Date** |
|  |  |  |  |

## Definitions, Acronyms and Abbreviations

| **Status** | **Acronym** | **Term** | **Definition** |
| --- | --- | --- | --- |
| Re-used | IOMS | Inventory Order Orchestration & Management System |  |
| Re-used | ID | Identity Document |  |
| Re-used | OMS | Online Management System |  |
| Re-used | MTN | Mobile Telecommunications Network |  |
| Re-used | HVRC | High Volume Repair Centre |  |
| Re-used | WMS | Warehouse Management System |  |
| Re-used | PM | Project Manager |  |

# Introduction

Currently there is no consolidated place where all warehouse related queries are logged and managed. Channels are sending emails and making phone calls to the warehouse when they have queries. It takes longer than necessary to resolve these queries due to delays in directing the queries to relevant personnel which subsequently results to unhappy customers.

To address this, the warehouse would like to implement a centralised support model that will effectively address customer queries by giving them a platform to view their order, return or collection status and allow them to log and track their queries. The warehouse support model will be utilised by the channels that have warehouse related queries.

## Purpose

The purpose of this document is to provide an overview of business, functional and non-functional requirements for the warehouse support model functionalities. These requirements serve to enable the warehouse to implement a centralised support model.

## Scope

### The warehouse support model will introduce a centralized platform to manage

### warehouse queries. This support model will focus on the following:

* View and Search for orders, returns or collections status;
* View and track RMA number;
* View Proof of Delivery documents and Tax invoices;
* Create requests (Track, close and reopen requests);
* Assign and Reassign tasks;
* Escalations

## Core Team

|  |  |
| --- | --- |
| **Requester** | |
| **Requester’s Name** | Quintus De Beer |
| **Requester’s Department** | Finance |
| **Requester’s OPCO** | South Africa |
| **Date of Submission** |  |
| **Team (Completed by Demand Manager)** | |
| **CER /Project Number** |  |
| **Business Analyst** | Phathiswa Gulwa |
| **Project Manager** | Christiaan Potgieter |
| **Solution Architect** | Louw Fouche |

# Stakeholder Descriptions

## Stakeholder Summary

|  |  |  |
| --- | --- | --- |
| **Role** | **Description** | **Responsibilities** |
| Project Owner | The sponsor of the project | * Owns the project requirements. |
| Business Analyst | To collect, analyse and document requirements | * Document the Requirements Definition Document. * Elicit, collates and document requirements. * Obtain documentation sign-off. * Identify and communicate training and change requirements. * Support training, change and development efforts. |
| Project Manager | To monitor project progress as well as manage raised risks and solve issues. | * Plan the delivery of the project. * Coordinate project activities. * Support the risk and issue administration and management. |
| Subject Matter Expert | To support business during the requirements elicitation. | * Provide a business understanding. * Review requirements. * Assist the process mapping initiatives. |
| Architect | Driver of the solution | * Review business requirements. * Coordinate all architecture activities during solution derivation. * Derive the solution. * Document the Terms of Reference Document. |
| Developers / Vendors | Solution provider | * Enhance existing functionality to meet business requirements. * Manage the delivery of the solution. |
| IS | Provides IT solutions | * Provide system support and maintenance post implementation. |
| Testing | BAT/UAT | * Provide end to end testing on the optimized solutions and functions. |
| Training | Provides Training | * Provide training to support the various solutions within the business area. |

# Context and Boundaries

Below is a context diagram that illustrates the warehouse support model functionality.



**Figure 1: Warehouse Support Model Context Diagram**

## Positioning Statement

|  |  |
| --- | --- |
| **The problem/opportunity of** | Current ways of reporting and tracking issues are not effective, leading to high delays in resolving queries. |
| **effects/exist for** | MTN |
| **the impact/need of which is** | Offer a self-service portal to report, track and monitor warehouse related queries. |
| **a successful solution would be to** | Implement Warehouse Self-Service Portal. |
| **measured by** | * Improve customer satisfaction. * Improve quality of service. * Improve query turn-around times. |
| **assessed with** | Impact on number of queries resolved and how long it takes to resolve. |

## Assumptions

None

## Exclusions

MTN customers will be excluded from utilizing the proposed portal. Only the MTN channels and Warehouse internal staff that will use the portal.

## Risks

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **If** | **then** | **Mitigation Actions** | **Owner** |
| 1. | This initiative is not implemented. | Resolving customer queries will continue to take longer than necessary. | Implement this initiative as soon as possible. | PM |
|  |  |  |  |  |

## Dependencies

Viewing of Tax invoices will be dependent on the WMS solution which is currently writing the invoices to PDF.

## Impacts

### **Business Impacts**

The business areas below will be impacted by the changes introduced as part of the project.

* Warehouse Internal Teams
* HVRC (High Volume Repair Centre)
* Sales Channel
* Channel Partners
* Channel Support
* Courier
* Training: Learning and Development

### **Projects Impacted**

None

# Business/Functional Requirements

The below table capture the functional requirements for this initiative. The requirements are prioritized as high, medium and low as defined below:

• **High –** Required as part of requirements to provide the interim solution for warehouse support model.

• **Medium –** Necessary requirement to improve customer experience.

• **Low –** Additional business requirement/Nice to have.

|  |  |  |
| --- | --- | --- |
| Requirement No. | Requirement Description | Priority |
| 1. | Create a portal for channels and warehouse teams to self-manage warehouse related queries. | High |
| 2. | The system must display customer orders, returns or collections and RMA. Users should be able to view all their orders, returns or collections and RMA with latest status. Functionality will be governed by set user roles e.g. A Dealer/Store must be able to view their own orders and returns. | High |
| 3. | The system must allow access to view documents such as Proof of Delivery (POD) and Tax invoices. | High |
| 4. | The system must allow users to search for an order. The user must be able to search based on different attributes such as:  Sales Channels:   * IOMS order number * ID number * ERP number * UV number * Helios number (222) * Customer account number * OMS PO number * WMS Invoice number * Channel * Channel Partners * Region * Sales Representative * Courier status * WMS status * Device (IMEI) * Date range * Remedy waybill number * Work Order number (Remedy) * Siebel number * Collection number (RTT): Manual Remedy and Siebel * Collection number (DSV): Manual Remedy and Siebel * Invoice number   Warehouse Internal Teams (Receiving/Production/Shipping/HVRC Teams):   * IOMS order number * ID number * Customer account number * WMS Invoice number * Product shipped (SKU) * Channel * Channel Partners * Store number * Dealer * Courier status * WMS status * Device (IMEI) * Date range * Paused status * Order number   Courier:   * Waybill number * IOMS number * Invoice number * IMEI * Order number   Channel Support:   * Courier status * Dealer * Store * Channel * Channel Partner * Region * WMS status * UV number * ID number * Cell phone number | High |
| 5. | The system must allow the logging of new queries/service requests. | High |
| 6. | The system must allow reopening of existing queries/service requests should the user is not satisfied with resolution. | High |
| 7. | When a new or existing query is logged and submitted in the system, an automatically generated email and SMS needs to be sent to the Supervisors to alert them of the logged query. | High |
| 8. | The Supervisors must be allowed to assign and re-assign tasks amongst team members. |  |
| 9. | If a task is assigned incorrectly, there must be a functionality to allow users to send back the queries to Supervisors. Tasks cannot be re-assigned more than twice, these must be escalated. |  |
| 10. | The system must display all logged queries and the status of the queries. These must be available for viewing to the user that logged the queries. | High |
| 11. | Queries must be categorised according different types such as:   * Order status, * Priority, * Returns, * Collections, * Repairs/warranty assessments, * Others. | High |
| 12. | The system must be able to track paused orders and send notification to the channel that the order belongs to. The channel must have an ability to provide alternative contact details or any other information required by the courier. Sales Channel and the Returns Team must be notified of the returned order and automatically open a Siebel ticket for returned order. | High |
| 13. | The system must escalate a paused order if no action is taken after a certain period. The period must be adjustable. | High |
| 14. | The system must allow queries to be prioritized and escalated (when required) to the appropriately experienced team leaders as needed. | High |
| 15. | All queries must be responded to within agreed service level timeframes. The service level timeframes must be adjustable. If the timeframe is reached the system must automatically escalate to the Supervisor/Manager. | High |
| 16. | The users must be able to successfully provide timely feedback and status to the channels on their open queries. | High |
| 17. | The system must have a functionality to close queries once are resolved. And a notification of closure must be sent to personnel that logged a query. | High |
| 18. | There must be the capability for the users to opt in/out for any SMS and/or email notifications. | High |
| 19. | There must be the capability to set the hierarchy of escalations. | High |
| 20. | Remedy tickets must be made available on this portal for actioning. | High |

# Non- Functional Requirements

## Security

### **IT security matrix**

|  |  |  |
| --- | --- | --- |
| **Risk Item** | **Yes/No** | **If Yes, list any possible risk associated with the solution requested in this RDS?** |
| Do the requirements that are being drawn up involved in processing: |  |  |
| Financial transactions | No |  |
| Prepaid airtime | No |  |
| Payments | No |  |
| Call Data Records (CDRs) | No |  |
| Does the area work with or change customer information? | Yes | Work with Customer information. |
| Does the area work directly with the customer? | No |  |
| Does customer, financial or billing information need to be transmitted via the internet? | Yes |  |
| Do the requirements need any system to be exposed to the customer via the internet or otherwise (such as on MTN Active or via mtn.co.za)? | No |  |
| Do the requirements need information to be transferred to or from any external network service provider (such as Nashua Cellular, etc.)? | No |  |
| Is the business area for which the requirements are being drawn up ANY of the following:  Business Risk Management, Internal Audit, Forensic Audit? | No |  |
| If a solution is being requested, will it be made available on a mobile device such as a smart phone or tablet PC? | No | It must be able to support mobile device usage where required. |
| Is the requirement related in any way to legislation (such as RICA, POPI, etc.)? | Yes | POPI: Courier will have access to customer data therefore the customer information must be encrypted as far as possible. Only the required information must be made available to the Courier. |

## Training

|  |
| --- |
| **Requirement Description** |
| MTN to organize for all trainers and relevant technical and support staff to be available for training within an agreed period of implementation of the project. |
| There must be training pack that will be distributed to the channels. |

## Archiving and Audit Requirements

|  |
| --- |
| **Requirement Description** |
| The archiving and audit requirements will be as per the MTN Records Retention and Classification Schedule. |
| Event-based audit trail reports for all end to end provisioning tracking must be provided. |
| The portal shall always track user ID, date/time, actions, data and status of all request/response. |

## Disaster Recovery

|  |
| --- |
| **Requirement Description** |
| The platform must support clustered and high Availability Disaster Recovery architecture. |
| The platform must advise Customer by email of critical network or MTN infrastructure outage affecting Customer. |

# Business Processes

## Create Request Process



**Process Narrative: Create Request Process**

|  |  |  |  |
| --- | --- | --- | --- |
| **Process Activity** | **Process Activity Description** | **Role** | **System** |
| Login and submits new query/ reopens existing query | Channels will login and submit a new query or reopen an existing query that has not been resolved. | Channels | Self Service Portal |
| Store query and send notifications | Query will be stored and the relevant Supervisors will be notified of the query logged. If queries are not actioned after a certain period, they will be escalated to the Manager. |  | Self Service Portal |
| Receive query notification | Supervisors will receive the notifications for the logged queries | Supervisor | SMS/Email |
| Assign query to relevant personnel | Queries will be assigned to relevant personnel to solve the issue. | Supervisor | Self Service Portal |
| Send back to Supervisor for reassignment | If the query is not assigned to the correct person, the query will be sent back to the Supervisor to reassign correctly. Queries cannot be reassigned more twice. | Internal Warehouse Team | Self Service Portal |
| Assess and resolve query | Assess the query and implement a resolution. | Internal Warehouse Team | Self Service Portal |
| Escalate query to Supervisor or Manager | If the query cannot be resolved, the query must be escalated to the Supervisor or Manager. | Internal Warehouse Team | Self Service Portal |
| Find resolution and close query | Query will be resolved and once resolved it will be closed. | Supervisor | Self Service Portal |
| Receives completion notification | Once the query is closed, a notification will be sent to the channel that opened the query. | Channels | SMS/Email |
| END | | | |

## Paused Order Process



**Process Narrative: Paused Order Process**

|  |  |  |  |
| --- | --- | --- | --- |
| **Process Activity** | **Process Activity Description** | **Role** | **System** |
| Send Paused Order notification | Once a Courier logs a paused order, a notification must be sent to the relevant personnel within the channel that the order belongs to. |  |  |
| Submits Alternative customer details/ required info | Required customer details will be submitted. If there is no action after a certain period then the paused order must be automatically escalated to the Manager. | Channel | Self Service Portal |
| Customer details stored | Required customer details will be stored |  | Self Service Portal |
| Send notification to Courier | A notification of updated customer details will be sent to the courier. |  | Self Service Portal |
| Receive required information | Courier will receive the required customer information | Courier | Self Service Portal |
| Acknowledge Receipt | Courier will acknowledge that they received required customer information. If there is no acknowledgement, paused order will be automatically escalated to the channel after a certain period. | Courier | Self Service Portal |
| Contacts customer | Courier contacts customer using the updated customer details. If the customer cannot be contacted within x number of days (number of days per channel), then a paused notification must be sent to the channel with a reason of pause. If the customer cannot be contacted and the x number of days has lapsed (per channel), then the order will be returned to the warehouse. | Internal Warehouse Team | Self Service Portal |
| Deliver Order and update order status | If a customer is contacted successfully, then the order will be delivered and the order status will be updated. | Courier | Self Service Portal |
| Return Order to the Warehouse | Order will be returned to the warehouse after trying to contact the customer and the x number of days has lapsed. Channel and Returns Team will be notified of the returned order and a Siebel ticket of the returned order will be automatically generated. | Courier | Self Service Portal |
| END | | | |

# Product Business Rules

## General Rules

##### Only authorized users will be allowed to access the Portal.

* + 1. A Courier must only view and search for their own orders and returns or collections assigned to them.
    2. A Dealer/store/channel/channel Partner must only view and search orders, returns or collections and RMA from their own stores or channels.
    3. Warehouse Teams must be able to view and search all the orders, returns or collections and RMA with latest statuses.

##### Queries must be assigned to Supervisors and they must be advised if they are assigned a task via SMS and email. Notification will be sent via email if an email address is available.

* + 1. The user that is assigned a task must be able to send back the query to the Supervisor if the query is incorrectly assigned. A task must not be re-assigned more than a certain number of times. The number must be adjustable.
    2. Open queries must be automatically escalated to the supervisors or Managers if not actioned after a certain period logged.
    3. Paused orders must be automatically tracked and notification of the paused orders must be sent to the channel that the order belongs to. The channel must be able to provide required customer details to the Courier. If the required customer details are not provided within a certain period, the query must be escalated to the Supervisor or Manager of that specific channel. The period must be adjustable.
    4. Once the required customer details are submitted, a notification must be sent to the Courier and the Courier must acknowledge receipt of the customer details with time and date they tried to contact the customer.
    5. If the Courier does not acknowledge receipt then the paused order must be escalated to the channel after a certain period. The period must be adjustable.
    6. A paused order must be sent back to the warehouse if x number of days has lapsed. The number of days must be adjustable per channel. The channel that the order belongs to must be notified together with Returns team. And the Siebel ticket must be automatically generated.

## Product Communication Rules

* A plan should be created to make customers aware of the new warehouse support portal.

# Configuration Requirements

|  |  |
| --- | --- |
| **Number** | **Business Rules** |
| 1 | Warehouse Self-Service Portal: The Warehouse Self-Service portal must be updated with the following functionality:Tracking of orders, returns, collections and RMA;Viewing of POD (Proof of Delivery) documents and Tax invoices;Logging new queries;Reopening existing queries;Tracking paused orders;Assigning/reassigning tasks;  * Update query status and feedback; * Capture alternative customer details or required info; * Close queries. |

# Reporting Requirements

### Below are reports required for Warehouse Support Model. These reports must be made available on OBIEE. These reports must be available on a daily, weekly and monthly basis. Reports must include the minimum required data for the purpose. If the information is not required it must not be included in the report.

##### Queries logged per channel: Display datetime logged, status, assigned to, how long, query within SLA, overall time since the query logged, logged by (person and department).

* Paused Orders per channel: Display datetime paused, current status, within SLA, overall time since the order paused, paused by, reason to pause an order. Turnaround time (how long it takes to resolve queries) per channel, per department logged and per department to action.
* Orders per channel: Order status, Within SLA, Out of SLA (per End-to-end process and per process), how many orders in certain status and for how long it has been in that status.
* Collections/Returns per channel logged: Turnaround time, SLA (Per End-to-End process and per process), how many logged per person, number of collection/returns logged and how long it takes to process. Display return/collection statuses and how long it has been in that status.