

PuroTouch Requirements

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# Executive Summary

## Project Overview

The PuroTouch web application will provide a web front-end for Purolator International to store information about current and potential customers beginning with the onboarding request from sales, through final implementation and stabilization. A centralized database on the backend will ensure that all customer shipping solution information and recorded notes are stored in one central and secure location.

## Project Purpose and Scope of this Project

The purpose of PuroTouch is to create a data store of customer information regarding their shipping solution details which will be stored in a central location and can easily be accessed, searched and reported on. All notes pertaining to that customer recorded during customer interactions will also be entered in the central database.

## Current Challenges

Currently, the onboarding group faces challenges with regards to customer support. Details of the customer’s shipping solution are stored in varying sources, depending on the exact solution. In order to find out the customer details, the IT Business Analysts (ITBAs) must check several different sources to gather information.

## Proposed Solution

The proposed PuroTouch system will provide an interface where customer shipping solutions are stored and can easily be retrieved and updated. Furthermore, all customer notes entered by the Sales Professional or Business Analyst will be stored along with the shipping details so that all customer details are stored in one place. The Business Analyst will be able to record the time associated with each task involved in onboarding a customer so that we can gather and report on metrics.

# Product Description

## Overview

The PuroTouch application will include a Discovery Request form where the Sales Professional initiates a request for onboarding discovery. The ITBAs will be able to record notes on all steps taken for the account, documenting all calls. As the account is set up to ship, the ITBA will record all pertinent information in the form. A search screen will be included where the Onboarding group can search for requests. Reports will be available to show metrics gathered on customers including time spent per customer, per task and per phase.

## Requirements

* Replace the Eloqua Form with a Web Application (To be called Discovery Request)
* Replace IT Discovery Request Tracker
* Provide interface for customer notes to be recorded
* Provide time tracking by customer for ITBAs
* Role-Based system will customize the dashboard and screens available for each role

# Components

* Home Page Dashboard
* Discovery Request Entry/Edit
* Maintenance Screens
* Discovery Tracker
* Reports

## Home Page Dashboard

Include bar graph of Product Groups and Pie Chart of Accessorial Names

## Discovery Request

The discovery request begins with the Sales Professional who is requesting ITBA assistance in onboarding a customer. Customer details are saved in the Discovery Request form and forwarded to the Onboarding Manager who then assigns and ITBA. The ITBA will update the discovery request with customer and shipping details as well as notes taken during calls as they go through the process of onboarding the customer.

## Maintenance Screens

Users will have the ability to add new data or modify existing data. All data will be verified according to the data validation rules. Audit trails of all changes will be maintained.

* Task Types
* ITBAs
* Equipment
* File Types
* Customs Types
* Communication Methods
* Close Sales Reasons

## Discovery Tracker

Replaces the current Discovery Tracker Google doc used by the Onboarding team. All discovery requests and implementations are displayed in a grid which can be searched and exported.

## Reports

* Onboarding Time Per Customer
* Onboarding Detail Report
* Onboarding Time Per Phase
* Closed or Lost Sales
* Top Ten Customers by Projected Revenue
* Top Ten Customers by Time Spent
* Time Spent by ITBA

# User Roles

* Sales Professional
  + Can submit a Discovery Request Form
  + Can view, modify and add notes to their own Discovery Requests
  + Can see their active requests with current phase and ITBA notes
* Sales Manager
  + Same as Sales Professional but has access to all Discovery Requests
* IT Manager
  + Notified of new Discovery Requests
  + Can assign ITBAs to requests
  + Can view, modify and add notes to all Discovery Requests
* ITBA
  + Notified of new Discovery Requests assigned to them
  + Can view, modify and add notes to all Discovery Requests
  + Can record task type and time spent to notes
* Audit role
  + Has the ability to view Discovery Requests without ability to update
* Admin role
  + Admin user should be able to perform all the actions of any user role
* IT Admin role
  + Similar to Admin user for now but eventually will additional special permissions

# Use Cases

**Use Case 1**

Submit a Discovery Request Form – Sales Professional fills in basic customer information and submits a request.

**Use Case 2**

Assign an ITBA to a New Request – IT Manager receives a new request and assigns an ITBA.

**Use Case 3**

View, Update or Print Discovery Request Form – IT Manager, ITBA, Sales Professional can each view, update and print the current information on the Discovery Request form.

**Use Case4**

View, Search and Filter Discovery Tracker – IT Manager, ITBA can search through all discovery requests.

**Use Case 5**

View, modify and add *Notes* to Discovery Requests - IT Manager, ITBA, Sales Professional can each add their own notes to an existing Discovery Request.

**Use Case 6**

Record Task Type and Time Spent – ITBA will use the Discovery Request Notes section to keep track of time spent on each task.

**Use Case 7**

View Public Notes – IT Manager, ITBA, Sales Professional can all view the public notes associated with a Discovery Request.

**Use Case 8**

View Internal Notes – IT Manager, ITBA can view the internal notes associated with a Discovery Request. Sales Professionals do not see internal notes, only public notes.

**Use Case 9**

Run Reports – IT Manager, ITBA and Sales can each run reports to see information based on their level of access.

# Technical Requirements

## Database

The application will use the new PuroTouchSQL database within the corporate SQL database structure.

#### Table Structure

tblBillingTypes – billing type choices ex. Edi or paper

tblBrokers – list of customs brokers

tblCloseReason – reasons for discontinuing a request

tblCommunicationMethod – edit communication methods

tblCustomsTypes – customs types (ex. Pars or pass)

tblDataEntryMethods – data entry choices for entering shipping data

tblDiscoveryRequest – data associated with each customer discovery request

tblDiscoveryRequestDetails – shipping details associated with the customer

tblDiscoveryRequestEDI – EDI requests for the customer

tblDiscoveryRequestEquipment – equipment requested for a customer tblDiscoveryRequestNotes – notes associated with a customer

tblDiscoveryRequestProducts – products proposed to the customer tblDiscoveryRequestServices – services proposed to the customer

tblEDISolutions – list of edit solutions (ex. 210, 214)

tblEquipment – list of equipment for customer implementations (ex. Scanner, scale)

tblFileType – file types for EDIT (ex. Text, csv)

tblInductionPoints – list of induction addresses

tblITBA – list of employees who are ITBAs

tblOnboardingPhase – onboarding phases (ex. Discovery, implementation, go live)

tblShippingChannel –list of shipping solutions (ex. Integrator Web, 3PV, ESO)

tblShippingChannelProducts – list of Products (ex. Ground, Express)

tblShippingChannelServices – list of services (ex. LTL, courier)

tblTaskType – list of onboarding task types for time and note recording

tblThirdPartyVendor – list of third party vendors

#### Data Elements Associated with Discovery Request

Customer Name

Customer Address

Customer Website

Commodity

Projected Revenue

Sales Rep Name

Sales Rep Email

District

Branch

Customer Business Contract Information

Customer IT Contact Information

Proposed Customs

Current Onboarding Phase

ITBA Assigned

Target Go-Live

Actual Go-Live

Shipping Channel

Solution Summary

Third Party Flag (Vendor Number if applicable)

WorldPak Flag

Customer Own Flag

Invoice Type

Bill-to Account

FTP Username and Password, if applicable

Customs Supported Flag

E-link Flag

Pars or Pass Numbers if applicable

Customs Broker

Support User

Support Group

Office

Group

Migration Date

Pre Migration Solution

Post Migration Solution

Control Branch

Contract Number

Contract Start Date

Contract End Date

Contract Currency

Payment Terms

Close Reason, for those Requests that are closed

#### Shipping Details associated with Each Shipping Solution

**Courier**

Account Number

Pin Prefix

Contract Number

Transit Days

Induction Address

FTP username and password

Sender ID

**LTL**

Account Number

Min Pro Number

Max Pro Number

**CPC**

Account Number

Site Number

Contract Number

Induction Number

Username

Password

**PuroPost**

Account Number

Transit Days

Induction Address

**Returns**

Account Number

Returns Address

**WorldPak Info**

Sandbox Username and Password

Production Username and Password

Custom Export flag

Ghost Scan flag

East/West Split flag

Address Upload flag

Product Upload flag

Data Entry Method

#### Other Items Associated with a Request

EDI Requests

Equipment Requests

Products

Services

Notes recorded by ITBA