## ePrint- Does it fit the Proposed Requirement and Functionality?

#### Copy Express Requirement

To provide a website with appropriate backend and possible integration with Xero that allows customers to order print jobs online and meets the budget requirement of $200 to $500 per month (depending on the quality of the solution). **$600NZD per Month, $2500NZD setup fee**

**Front End Requirements**

* Design – customer able to custom design their required print jobs ✓
* Proofing – a traceable customer approval system of proposed work designed by copy express (PDF format). ✓
* History – Customer’s previous jobs/designs available for reordering/ editing etc. ✓
* Ordering and Reordering✓
* Default Prepaid Payment system – Credit card and Online banking (online banking option to delay job start and due dates until staff can acknowledge that the payment is received- staff notification of pending payment?). On-account clients should have invoices added to Xero through API with correct terms. Ideal if we could batch invoices for on-account clients so that they don’t get multiple invoices per month. ✓
* Portal – provide semi completed templates for customer design assistance (e.g. add Logo, address) and ideally VDP**\*** dynamic capabilities for customer use. ✓
* CRM – leads/ quotes

- clients/mailing list  
- reminders (e.g. only order 6 months of business cards; send reminder after 5 months to reorder). 🗶

-Surveys – customer feedback. 🗶 ✓(Potential to add a form)

* Pricing✓
* Kiosk – internal access ability by staff. ✓
* Wide (Large) Format Available. ✓

**Back End requirements**

* Keep good specification records – i.e. information currently recorded on the paper tickets. ✓*Still uses paper tickets plus can be progressed in the MIS module*
* Sales/ Quote ability ✓
* Workflow tracking– know where the job is in the process (design /pre-Press, printing, finishing, shipping) and where delays are occurring, possible notification/ alerts if job is not shipped or picked up etc. Tracking of outsourced work. ✓
* Staff to be able to tick off the electronic ticket as work is completed. 🗶 Paper ticket, could log on and progress job though
* Allow for multiple staff accessing one ticket. ✓(online) 🗶 Paper ticket,
* JDF (Job Definition Format – scripting language for the printer software – used to set up for a job) output by the solution is highly desirable, especially for small jobs, but low priority. 🗶

**Invoicing**

* Ideally avoid having to use the current excel spread sheet. ✓
* Minimum requirement is an output to a CSV file better to source or code an API to Xero. ✓
* Preferable batch processing of weekly / monthly jobs- one invoice with details of all the jobs. 🗶
* Nice to be able to track cash sales but not essential, need to at least quantify how much is going through the till e.g. Vend POS system to classify the sales. ✓

**CRM**

* Specialised/ accurate/relevant advertising e.g. Flyer printing promotions to clients that order flyers. ✓API for Mail Chimp
* Database incorporated in the online package, not custom built and maintained. ✓

May be able to write an overlay to connect the front and back end packages together?!

**Business Process Requirements**

* Identify Backlogs, where processes are not working✓view jobs at different process phases, colour code by due date
* Job prioritisation so that staff know what job to do next, based on due date/time but allows for overriding when necessary. ✓ colour code by due date
* Alerts/notifications for backlogs and overdue work. 🗶 not popups or emails, ✓ colour code by due date
* Ability to track revenue to specific processes i.e. design time, printing, binding, cutting and finishing. Requires staff to be able to easily load billable and non-billable times into the system. (Billable time such as Design time, Non-Billable such as Printer setup). 🗶 can charge for designer but not non billable times
* Finishing charged by the minute. e.g. WorkflowMax ✓ all costs can be added to quotes with pre-set values
* Robs Design time to be booked at $60 per hour. ✓

#### System Functionality

The structure of the system can be divided into three main logical components. The first component is the Web Ordering subsystem that provides the functionality for customers to place orders and request for information. This component also provides functions that allow Copy Express employees to keep track of all orders placed, as well as updating orders which have been processed. The second component is the Website Management subsystem that enables Copy Express to add and update items, templates and pricing on items on their website. The last component is the Accounting subsystem which deals with invoices and produces weekly and monthly sales and trend reports.

The Web Ordering subsystem provides the following functionality:

* Register an account ✓
* Log in to the system✓
* Update their account information ✓
* Browse Shop ✓
* Select an item e.g. business cards, posters, flyers etc. ✓
* Customize options for a selected item ✓
* Browse supplied templates ✓
* Upload custom template design ✓
* Add an item to their Shopping Cart ✓
* Remove an item from their Shopping Cart ✓
* Provide delivery and payment details ✓
* Review order summary ✓
* Place an order ✓
* View order history ✓
* Receive confirmation of quote/design 🗶 Email only at present but will soon
* Place feedback/survey 🗶 Contact us but not Survey,( could link survey monkey to mailchimp)
* Retrieve new orders from the database ✓
* Queue management that prioritizes orders based on due date, simplicity etc…✓
* Modify the status of an order once it has been processed. ✓
* Approve Proofs 🗶 Email only at present but will soon (✓)
* Accept Quotes 🗶 Email only at present but will soon(✓)

The Website Management subsystem will only be accessible to authorized Copy Express employees and provides users with the ability to, using a graphical user interface:

* Add/Modify Clients ✓
* Add/Update/Delete a new item from the website✓
* Upload /Delete a template from the website✓
* Send Quotes. ✓
* Send proofs. ✓
* Update price for an item✓
* Update additional information e.g. descriptions, photos, etc. ✓
* Add/Modify Jobs. ✓

The Accounting subsystem provides the following functionality:

* Load invoices into Xero ✓
* Produce weekly and monthly invoices 🗶
* View Customer Credit 🗶 need to use Xero for this
* Produce weekly and monthly sales trend report🗶? Depends on definition of “ trend”, can load reports to Excel for further processing
* Produce weekly and monthly sales history report ✓