**March 6, 2015**

**Project Name – Fierce Custom Toolkit Site**

**Project Overview**

DCG ONE builds custom books for our client, Fierce. We need to build a new web site that will allow our client to create and order the custom toolkits online.

The Conversations Toolkit book is comprised of up to 11 preprinted modules listed below. Some of the modules are included and others are optional. For every Conversations book we create, we also build a companion Flip Book. And sometimes there are additional items that are added to the order like the 2730 Beach Ball or the 2750 Fierce Conversations book.   
If the output is a pick ticket for production of the book – what happens to these additional order items? Are they added to the order csv file or do they flow back into DR via the DR api?

Currently those additional items are also included in the Pick ticket. These items are all produced and stored at McCallum. However, moving forward it may make sense to house those items in DR – since we already have a DR site and will soon be residing in one place.

Long term I think a DR integration could be a good way to go. Short term, we’re looking to solve a problem at McCallum. The books keep getting messed up because there is a lot of rekeying of the data into Pace and the production people feel that it’s an issue with where the data originates.

--I need the expected output format for entry into Pace AND how will the pick ticket be delivered for ingestion into Pace?

The part numbers and items list below typically change several times per year so there will need to be an admin function that allows DCG ONE update the part numbers, descriptions and images as needed.  
How many total users will access the system? Do you have any idea of the expected daily or weekly load? Are users all in the same time zone or are they geographically dispersed?

We have thousands of users in the database, but most orders are placed by a couple of admins at Fierce. We get 2 to 10 orders per week.

Fierce would like to add an additional level of functionality whereby they are able to select the order in which the optional modules appear in the book. For example, instead of adhering to the module order shown below, they may elect to have 3318 Confront come before 3316 Coach, etc…  
This is new functionality, correct? Is this the only new functionality that will be introduced in this new version of the site? Yes. For now. Long term we may want to present them with a MyLifePDF solution (remember that one from last year?). That’s down the road a bit.

The custom builds are also classified as EC (Enterprise Client) and ED (Educational). This classification just indicates which type of sticker we place on the book during manufacturing.

Included means required – if a module is included it must be in the book? Yes

|  |  |  |  |
| --- | --- | --- | --- |
| **Included/**  **Optional** | **Conversations Toolkit Modules** | **Flip Book (FB)**  **Modules** | **Other non-module components** |
| Included | 3313 Front Cover | 3323 FB Front Cover |  |
| Included | 3314 Welcome Foundations | 3324 FB 3/4/7 |  |
| Optional | 3315 Team | 3325 Team | 2730 Beach Ball |
| Optional | 3316 Coach | 3326 FB Mineral Rights |  |
| Optional | 3317 Delegate | 3327 FB Decision Tree |  |
| Optional | 3318 Confront | 3328 FB 60 Seconds |  |
| Optional | FGIFRCFBTXBLK Custom Feedback Text |  |  |
| Optional | 2747 Accountability Text |  |  |
| Optional | 3319 Tools |  |  |
| Optional | 3320 Journal – 30 Days of Living Fierce |  |  |
| Optional | 3321 Evaluation |  |  |
| Included | 3322 Back Cover | 3329 FB Back Cover |  |
| Optional |  |  | 2750 Fierce Conversations Book by Susan Scott |

**Current State**

Orders for these books are placed on an ordering website that was built 7 years ago. The client’s needs have changed and we need to build a new website using the old website as a guide. The new site will need to have a refreshed look congruent with other online assets and will include enhanced features.   
We will need a style / branding guide. Also, we need to list out in detail all of the new features / enhancements.

I will see if can get them.

Login link to existing site and credentials are supplied below

<http://www.nationsprint.com/clients/fierce/>

Login = [test@test.com](mailto:test@test.com)

Password = !super1

The current site includes the following information and this will need to be carried over to the new site:

1. User Profile Data – all of this data can be exported from the existing site
   1. First Name
   2. Last Name
   3. Email
   4. Password
   5. Company name
   6. Telephone
   7. User type - 2 kinds – regular and admin
      1. Admins need the ability to order for other people. Regular users would just order for themselves.
   8. Ship Address 1
   9. Ship Address 2
   10. City
   11. State
   12. Postal
   13. Country
2. Catalog – this is where the books are built. Products are organized by tabs:
   1. Custom Conversation Toolkit - this is where most of the books are built. The rest of the tabs below allow for simple production selection except for the “Other Languages” tab which has an abbreviated version of the Custom Conversations Toolkit
   2. Confront/Accountability
      1. 2752 Confront and Accountability
   3. Feedback Toolkit
      1. FGIFRCFBTLKIT Feedback Toolkit
   4. Negotiations Toolkit
      1. 2753 Fierce Negotiations
   5. Generations Toolkit
      1. 2791 Generations Journal with Playing Cards
   6. Other Languages - Spanish and Portuguese (to come)

|  |  |  |  |
| --- | --- | --- | --- |
| **Included/**  **Optional** | **Conversations Toolkit Modules** | **Flip Book (FB)**  **Modules** | **Other non-module components** |
| Included choice of cover | 2766 Standard Spanish Tool Kit Cover or 2741 Coca Cola Spanish Tool Kit Cover | 3323 Flip Book Cover |  |
| Included | 2776 Spanish Toolkit Text Modules |  |  |
| Included | 2767 Spanish Toolkit Back Cover |  |  |
| Included |  | 2743 Spanish Flipbook |  |
| Included |  |  | 2730 Beach Ball |
| Optional |  |  | 2750 Fierce Conversations Book by Susan Scott |

* + 1. French Tool Kit
    2. German Tool Kit
  1. Miscellaneous
     1. 2750 - Fierce Conversations Book by Susan Scott
     2. 2730 Beach Ball
     3. 2732 Flipbook
     4. 2795 Facilitator Binder w/Slipcover and Dividers
     5. 2891 - 8 Bank Tab Set
     6. Vellum Sheets
     7. 2748 Design A Cave (Hidden from Standard users)
     8. 2749 Color Forms (Hidden from Standard users)
  2. Bundle Test – this is not a live tab. However, it was our attempt to see if we could program the ability to choose the order of the modules. It doesn’t’ work very well, but may be worth a look.

1. Shipping Tab
   1. Needs to recap order information
   2. Include shipping options
      1. DHL
      2. UPS Ground
      3. UPS 2 Day
      4. UPS 3 Day
      5. UPS Next Day Air
      6. UPS International Economy
      7. FedEx Ground
      8. FedEx 2 Day
      9. FedEx 3 Day
      10. FedEx Standard Overnight
      11. FedEx International Economy
      12. FedEx International Priority
      13. Will Call
   3. Shipping account number/carrier
   4. Desired Arrival Date
   5. Special Instructions Field
   6. Address information
      1. Attn: Name
      2. Ship To Company
      3. Street Address 1
      4. Street Address 2
      5. City
      6. State/Province
      7. Postal Code
      8. Country
      9. Phone

**Output**

1. The desired output is to create a pick ticket that accurately reflects both the Custom Conversations Toolkit and Flip Book product builds including specific shipping information as indicated in this document. This could be delivered as text or CSV file.

Can users order more than one book at one time? Also, again, what about the additional products like the beach ball? Yes. They may order 30 books at time or 50 or more. Each order would contain equal numbers of Customized Books, Flip Books and Beach balls.

1. Reporting module that allows us to capture and query order data for a specific time range. Reports should be available in Excel or CSV.

**Access**

1. We will need to program a Single Sign On from a separate existing Fierce Ordering Site. The exact location of the pass thru on the site has not be determined but you can see what the site looks like here:
   1. <https://shops3.directedje.com/fierce/login.asp>
      1. Login = [test@test.com](mailto:test@test.com)
      2. Pwd = !super1
   2. Please do not place any orders on this site.

What are the security requirements for this sso? Do we need to use OAuth or similar certificate based security along with SSL (https)? What information needs to be passed in the sso (email, role)? Are there any other points of entry / login points for our new site?

This really more about ease of access than security. We host the DR site which Fierce refers to as “The Pretty Store”. The PageDNA site is known as “The Ugly Store”. They’d like to access everything from one site – so they only need to keep track of one login. If they have a DR login the SSO will just need to pass those credentials over to the new site.

**Timeline**

We’d like to have something ready to test by April 15, 2015 or sooner if possible. I’m available to walk you thru the existing site and answer any questions you may have. Please contact me at:

Mary Brennan

[mary.brennan@dcgone.com](mailto:mary.brennan@dcgone.com)

Cell: 206.399.9330

**Access to PageDNA**

Also, who built/owns the existing site?  How will we get access to existing data and can we get on the server running this app?

The existing “Ugly Store” is hosted by PageDNA. I can export most of the user, item and order history data. We don’t have server access per se, but we do have access to quite a bit of information We don’t want to steal the existing store. It has outlived its purpose. But it’s a good reference to understand what has been done in the past.