

A Proposal for Sunrise Sports

Cloud POS System

December 9, 2019



Presentation Agenda

1. Introductions
2. Business Case & Flowchart
3. Request for Services
4. Project Scope
5. Project Requirements and Specifications
6. Implementation/Testing Plan
7. Training & Maintenance
8. Closing





Introductions

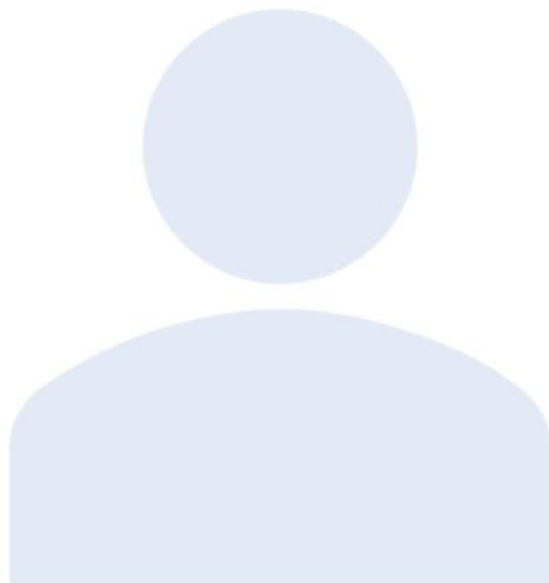
Calvin Kelleher, President

Aminata Sanogo, Project Manager

Melissa Marchetti, Technical Director

Molly Clayton, Business Analyst

Sichun (Sandra) Xu, Systems Designer





William Customer

- ❑ Founder of Sunrise Sports
- ❑ Bill has intentions to increase the size and revenue of his business by adding a storefront and a website.

Business Case

Sunrise Sports
Calvin Kelleher, President
352 Consulting

A dark blue, irregular ink splatter shape centered on a white background. The splatter has a textured, painterly appearance with some lighter blue and white speckles around its edges.

Total Budgeted Costs

\$50,244

Tangible Cost	Non-Recurring Cost
<u>2 Spectre 1080p Monitors</u>	\$100 each \$200 Total
<u>2 HP Business Desktops</u>	\$450 each \$900 Total
<u>Inateck Bluetooth Barcode Scanner</u>	\$70
<u>DYMO Label Printer</u>	\$100
<u>Verifone VX805 PINpad</u>	\$180
<u>iPad Tablet</u>	\$470
<u>HP Envy Printer</u>	\$250
<u>Netgear AC1750 WiFi Router</u>	\$150
<u>Panasonic KX-TGC222S Landline</u>	\$40
<u>Cat 6 Ethernet Cables</u>	\$40
Total	\$2,400

Tangible Cost	Monthly Recurring Cost
<u>HostGator Web Hosting</u>	\$6.95
<u>Positive SSL Certificate</u>	\$6.95
<u>Vend POS System</u>	\$99
<u>Triple Play (FIOS)</u>	\$70
<u>Shopify Ecommerce Platform</u>	\$30
<u>Backblaze Cloud Backup</u>	\$6
Total	\$188.90
3 Year Total	\$6,800.40

	Personnel	Time	Cost per Hour	Cost
Meetings	5 Employees	1 Hour per 2 Meetings (1 In-Person and 1 Virtual)	\$750	\$1,500
Development and Testing	5 Employees	3 Weeks	\$166.67	\$20,000
Implementation and Testing	5 Employees	5 Days	\$1,000	\$10,000
Training	1 Employee	2 Days	\$150	\$2,400
Remote Maintenance/ Assistance	2 Employees	4 Days	\$300	\$1,200
Total				\$35,100

Travel Expenses	Cost per Employee	Total Cost
Flights	\$1,078	\$5,390
Lodging	\$1,253	\$6,265
Meals	\$180	\$900
Total		\$12,555

Intangible Costs

- There may be a learning curve after the new system is implemented for Bill and his employees.
- Sunrise Sports will have to shut down for a few days while the system is being put into place, leading to a loss of business.
- Customers may not be happy that Sunrise Sports will be closed.

Benefits

Tangible Benefits

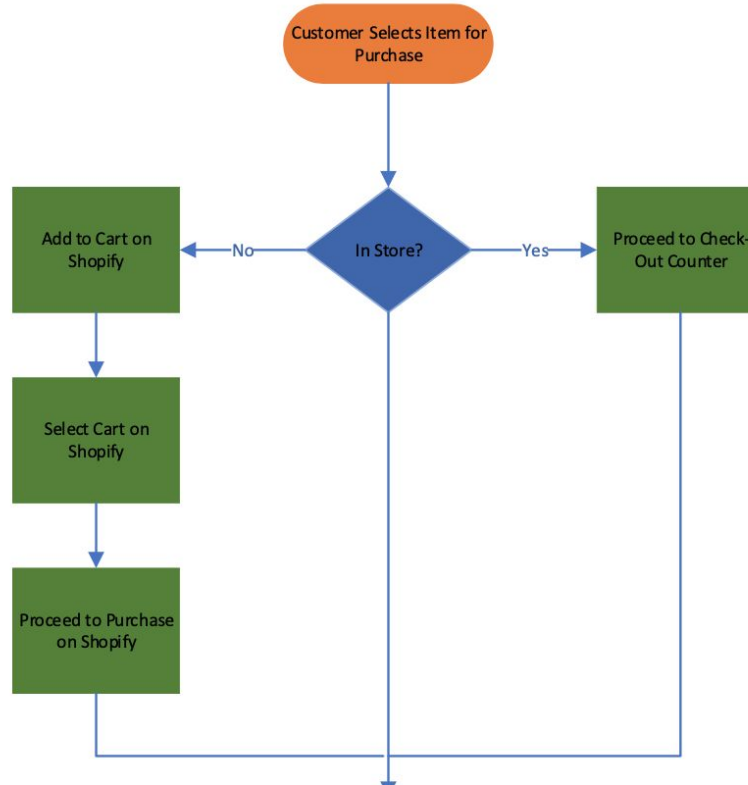
- This system upgrade will increase Sunrise Sports' reach which will bring in new customers.
- The new system will decrease the time it takes items to be sold and shipped which will decrease the costs associated with each.

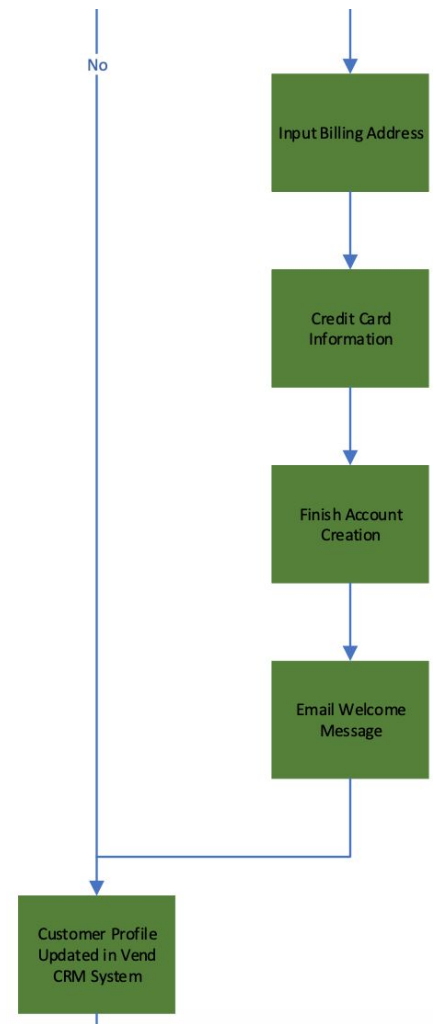
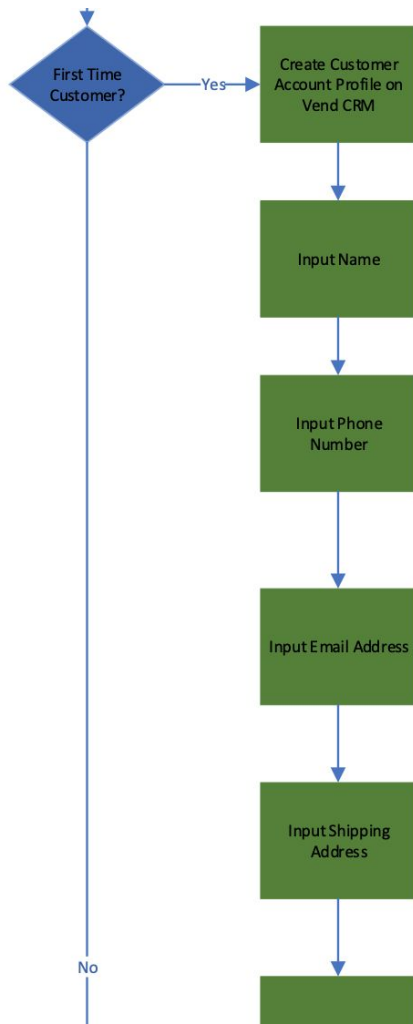
Intangible Benefits

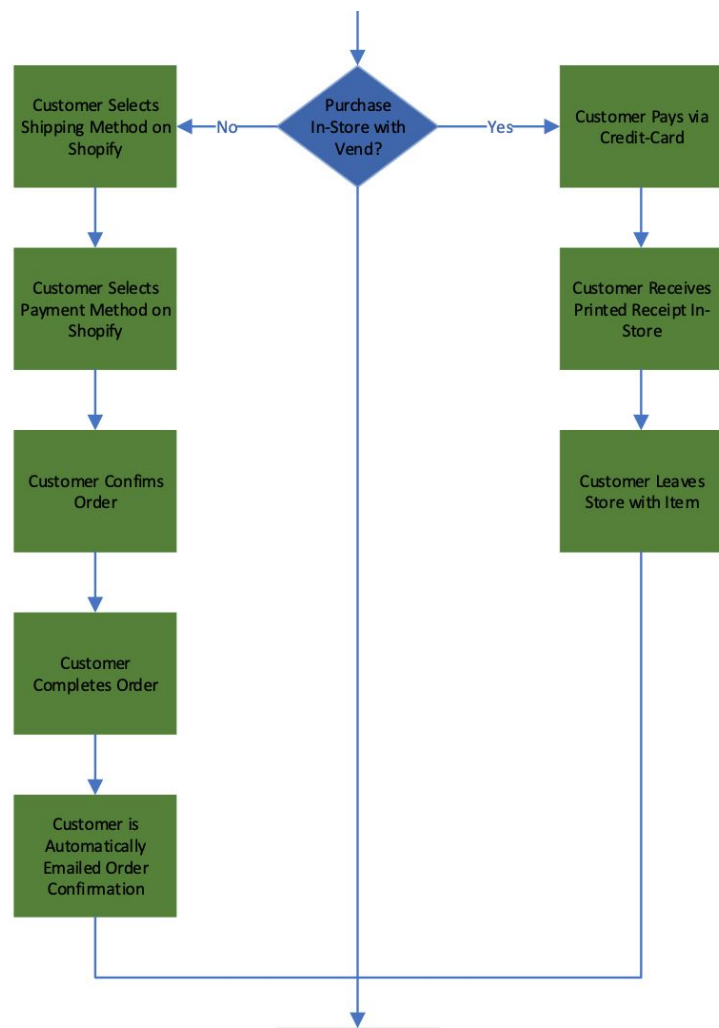
- Organized data that provides customer and sales insight that can improve the business.
- Streamlined sales and delivery systems leading to increased efficiency and in-turn increased customer satisfaction.
- More timely and easily accessible information will cause less stress.

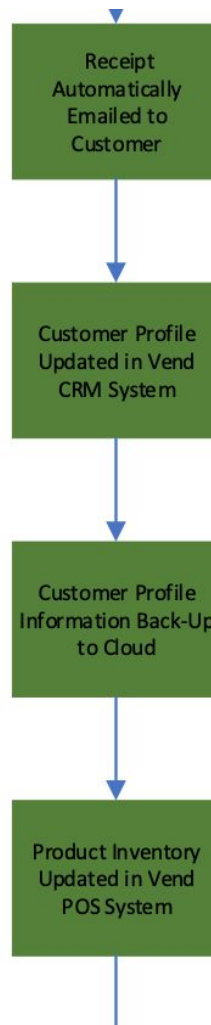
Sunrise Sporting Goods Cloud POS System

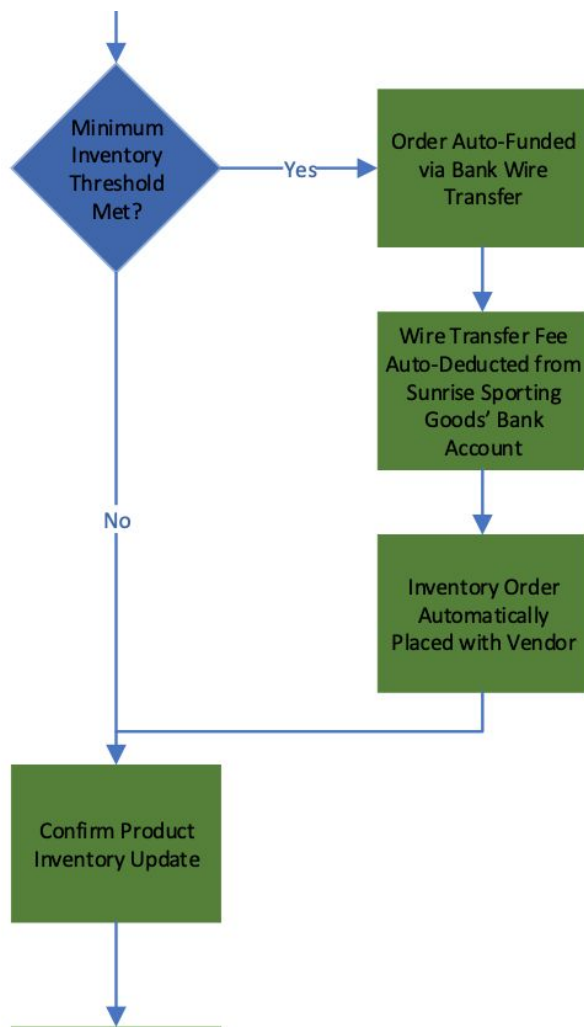
By 352 Consulting

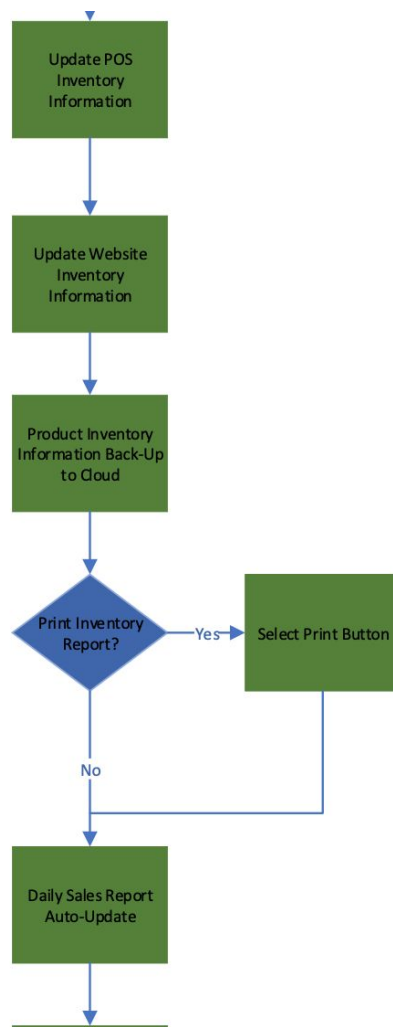


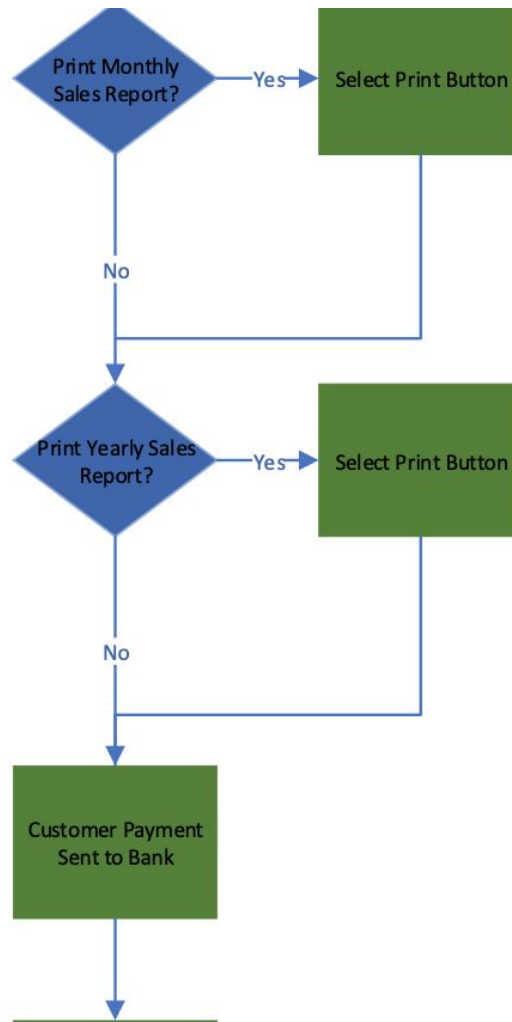


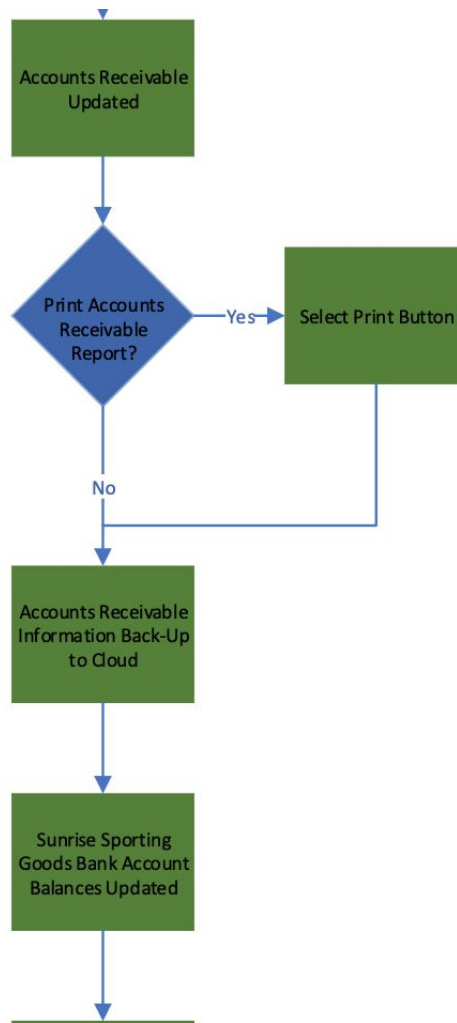












Account Balances
Information Back-Up
to Cloud

Complete System
Back-Up to Cloud
Part 1 of 2

Complete System
Back-Up to Cloud
Part 2 of 2

Customer Transaction
Complete



Request for Services

Sunrise Sports
Aminata Sanogo
352 Consulting, Project Manager

Project Management Timeline and Deliverables

- ❑ September 30, 2019 - Create Scope Statement
- ❑ October 3, 2019 - Create RFP
- ❑ October 5, 2019 - Create Business Document
- ❑ October 6, 2019 - Develop Flow Chart
- ❑ October 8, 2019 - Purchase Hardware and Software
- ❑ October 9, 2019 - Finalize Website Design and implement website
- ❑ October 14, 2019 - Testing and report functionality of website
- ❑ October 18, 2019 - Finalize Design and implementation of point of sales system
- ❑ October 24, 2019 - Testing and reporting functionality of point of sales system
- ❑ October 26, 2019 - Finalize Design and Implement inventory system
- ❑ November 3, 2019 - Testing and reporting functionality of inventory system
- ❑ November 9, 2019 - Set up wire transfer between Sunrise Sports' bank accounts and vendors
- ❑ November 10, 2019 - Set up Customer Relationship Management tool
- ❑ Set up sales tracking tool
- ❑ November 14, 2019 - Set up training for Sunrise Sports Employees

Business Requirements

- Automatic inventory system
- Train Bill and new hires on how to use POS and inventory systems
- Create a website for online ordering
- Link the customer ordering system to Bill's bank account
- Track companies' sales

Software and Hardware Functionality

Software functionality

- ❑ Point of Sale System
- ❑ Automatic Inventory System
- ❑ Customer Relationship Management (CRM)

Hardware requirements

- ❑ 2 Desktop Computers
- ❑ iPad Tablet
- ❑ Barcode Scanner
- ❑ Receipt/Label Printer

Selection Criteria

- **Expected Revenue**
- **Improvement to brand awareness**
- Resources required to deliver desirable customer outcome are feasible within the timeframe and budget.
- Customers demands and anticipated time frame are feasible with a five person team who may take on other projects during the same time frame.
- **Probability of success**

Project Scope

Sunrise Sports
Melissa Marchetti
352 Consulting, Technical Director

Product, Service, Result



- Cloud Based POS
- Automated Inventory Tracking & Re-stock
- CRM
- Sales Tracking



- E-Commerce Platform/Website
- Vend POS Integration



- Sunrise Sports Cloud Based POS
- E-Commerce Platform
- Automated Inventory System
- CRM
- Sales Tracking

Project Boundaries

In-Scope	Out-of-Scope
Cloud POS	Shipping Specifics
Automatic Inventory	Payroll
Bank Wire Transfer	Repair Business
E-Commerce Platform/Website	Storefront Zoning
Customer & Sales Tracking	Cash Transactions
Transfer of Old Customer/Sales Data to New System	
Sunrise Sports' Training and Maintenance	

Requirements
Cloud POS
Automatic Inventory
Bank Wire Transfer
E-Commerce Platform/Website
Customer & Sales Tracking
Transfer of Old Customer/Sales Data to New System
Sunrise Sports' Training and Maintenance
Proper Hardware/Software

Deliverables	
Cloud POS	Project Schedules
Automatic Inventory	Status Reports
Bank Wire Transfer	Business Case
E-Commerce Platform/Website	RFP
Customer & Sales Tracking	Scope
Transfer of Old Customer/Sales Data to New System	System Flowchart
Sunrise Sports' Training and Maintenance	
Proper Hardware/Software	



Sunrise Sports Cloud Based POS Project Timeline

9/23/19

Project Start Date

10/9/19

**System Design
Finalized**

10/14/19

**System Development
and Testing at 352
Consulting**

11/8/19

**System Installation,
Implementation, and
Testing at Sunrise Sports**

11/14/19

Training Begins

11/18/19

Maintenance Begins

12/15/19

Project End Date



Project Impact

- Efficiency
- Broader Market Reach
- Automatic Cloud Based POS
- E-Commerce
- Understanding of Customer Tendencies
- Ease of Inventory Updates

Conditions

Constraints

Budget
Time Frame
From Scratch
Minimal Tech Experience
Credit-Cards
Wire Transfer Fee

Assumptions

Communication Efficiency
Budget
Data Turnover
System Acceptance
Additional Hires
On-Time Completion

Risks

No Previous Online-Presence
Budget
System Support
Limited Tech Know-How

Choice of Bank Revision

- After further research, as originally requested, there are no Chase banks in Topeka, Kansas.
- Therefore, we have elected to use Bank of America for Sunrise Sports' bank, and to complete the wire-transfers for inventory orders.
- \$30 fee per wire-transfer.



Project Requirements and Specifications

Sunrise Sports
Molly Clayton, Business Analyst
352 Consulting

User Characteristics and Requirements

Characteristics	
<u>POS System</u>	<u>Ecommerce Platform</u>
Bill Customer	New and Returning Customers
Sunrise Sports Employees	
Requirements	
Hardware	Capable Device-- desktop, tablet, mobile phone, etc.
Technical Knowledge (minimal)	Technical Knowledge (minimal)
Wireless Connection	Wireless Connection
Bank Connection	Valid Information

Business and Functional Requirements

Business

- Enhance Bill's Daily Operations
- Take orders
- Record Customer Information
- Inventory Management
- Financial Reporting

Functional

- Carry out simple functions of the POS system and ecommerce
- Responsive

Performance and Quality Requirements

Simple and familiar format

Interactive Cart

Ability to handle debit/credit card transactions

Easy to use/train for POS system

Record and maintain customer information

Track sales

Handle any kind of traffic

Run efficiently

Load quickly

No lagging

System Design and Interfaces

POS System

POS System Supplier Page

vendbillcustomer

Help

Bill Customer

Home

Sell

Sales Ledger

Reporting

Products

Customers

Setup

Products

Stock Control

Promotions

Price Books

Product Types

Suppliers

Brands





Product Tags

You have 14 days left on your trial. [Activate your account now.](#)

Suppliers

View and manage your suppliers. [Need help?](#)

Add Supplier

Name 1 2	Description	Default Markup	Number of Products	
Bob's Bikes		0%	1	View Products  
Flo & Frankie		0%	14	View Products  

POS System Customer Info Page

vend

billcustomer

Help

Bill Customer

Home

Sell

Sales Ledger

Reporting

Products

Customers

Setup

Customers

Groups

You have 14 days left on your trial. [Activate your account now.](#)

Customer Details

Contact name

First

Last

Company

Customer code

Customer group

All Customers

Date of birth

DD

MM

YYYY

Gender

Select a gender

Contact Information

Phone

Mobile

Fax

Email

Website

Twitter

☐ This customer has opted in to receive marketing and promotional emails.

Address

Physical Address

Street

Street

Suburb

City

Postcode

State

Postal Address

Same as Physical Address

Street

Street

Suburb

City

Postcode

State

POS System Customer Database

The screenshot displays the 'Vend Bill Customer' web application. The interface includes a sidebar with navigation options: Home, Sell, Sales Ledger, Reporting, Products, Customers, and Setup. The main content area is titled 'Customers' and features a search bar, a 'Customer Group' dropdown, and an 'Export List' link. A table lists three customers: Amanda Customer, Melissa Marchetti, and Molly Clayton, all located in the United States with zero store credit and account balances. The interface also shows a trial notice and buttons for 'Import Customers' and 'Add Customer'.

Customers

You have 14 days left on your trial. [Activate your account now.](#)

Manage your customers and their balances, or segment them by demographics and spending habits. [Need help?](#) [Import Customers](#) [Add Customer](#)

Search customers by name, customer code, or contact details Customer Group [More Filters](#) [Search](#)

Showing 3 customers [Export List](#)

Customer	Location	Store Credit	Account
Amanda Customer Amanda-2N8G ALL CUSTOMERS	United States	0.00	0.00 Edit
Melissa Marchetti Melissa-W8QV ALL CUSTOMERS	United States	0.00	0.00 Edit
Molly Clayton 12345 ALL CUSTOMERS	United States	0.00	0.00 Edit
All Customers (3)		0.00	0.00


Displaying 1 - 3 of 3. 1

Type here to search 1:46 PM 11/6/2019

POS System Inventory Management

This product has 26 variants.

1 other has been removed. To add them back, [see what they are and restore.](#)

Variant Name	SKU	Supplier Code	Supply Price	Retail Price Including Tax	Enabled
▼ s / blue / merino	10947	Enter Code	\$ 10.00	\$ 35.00	<input checked="" type="checkbox"/> 

Inventory

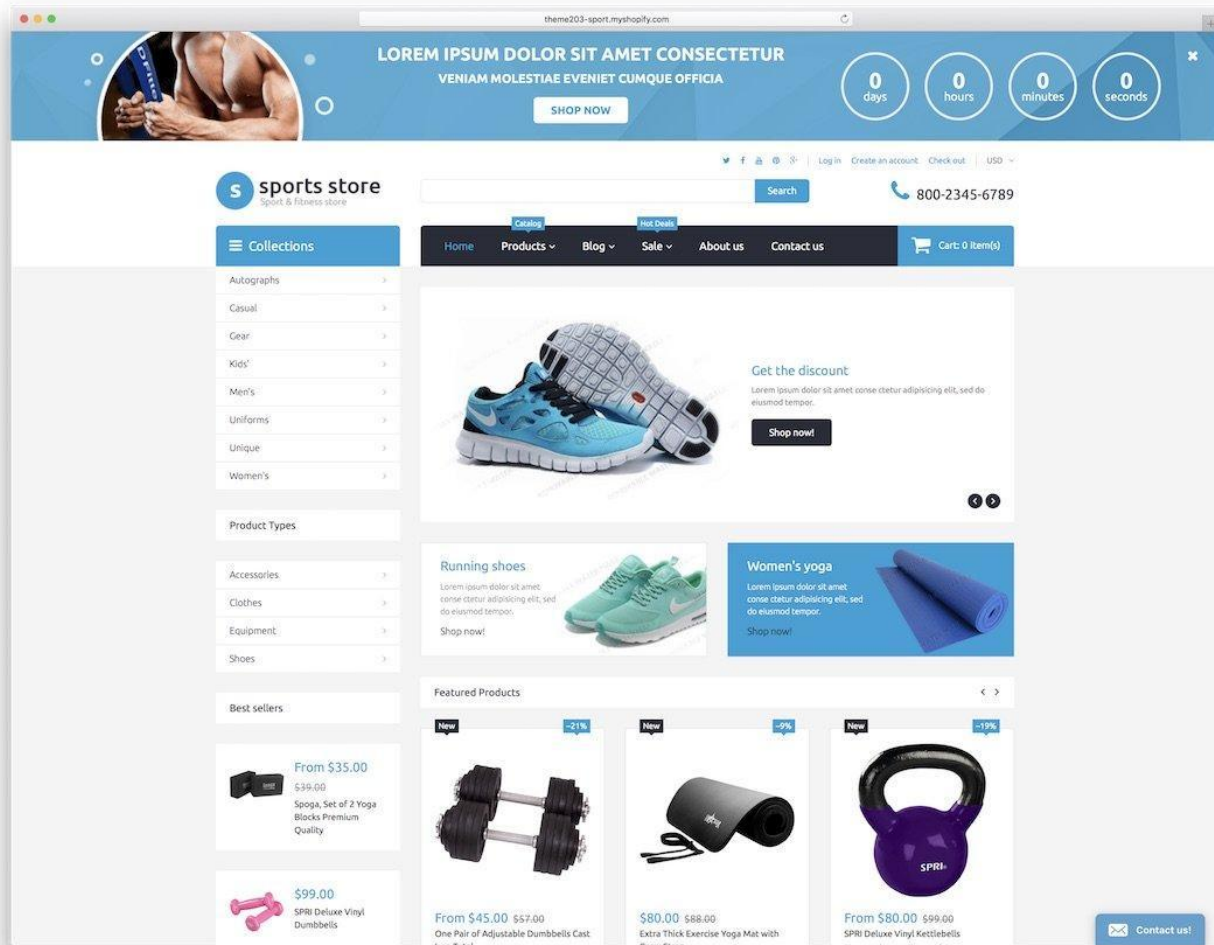
Tax

Price & Loyalty

Outlet	Re-order Point	Re-order Quantity
Brisbane Outlet	<input type="text"/> Apply to all	<input type="text"/> Apply to all

Ecommerce Platform

Site Home Page



Product Details Page

Call: +1 800 123 1234USD ▼

AccountWishlistCheckoutLogin or Register


Search

BOLT

MY CART / \$0.00

HOMEAPPLIANCESCOMPUTERSWEARABLESBLOGABOUT USCONTACT US

Home / Digital Clock / Amzer 86065 Silicone Skin Jelly Case



AMZER 86065 SILICONE SKIN JELLY CASE

★★★★★ No reviews

\$199.00

Availability **99 in stock.**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam fringilla augue nec est tristique auctor. Donec non est at libero vulputate rutrum. Morbi ornare lectus quis justo gravida semper. Nulla tellus mi, vulputate adipiscing cursus eu, suscipit id nulla. Donec a neque libero. Pellentesque aliquet, sem eget laoreet ultrices, ipsum metus feugiat sem, quis fermentum turpis eros eget velit. Donec ac tempus ante. Fusce ultrices...




-

1

+

ADD TO CART

Type MP3 Players
Vendor sample-electronics



Product DescriptionShipping and ReturnsSize ChartCustomer Review

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam fringilla augue nec est tristique auctor. Donec non est at libero vulputate rutrum. Morbi ornare lectus quis justo gravida semper. Nulla tellus mi, vulputate adipiscing cursus eu, suscipit id nulla. Donec a neque libero. Pellentesque aliquet, sem eget laoreet ultrices, ipsum metus feugiat sem, quis fermentum turpis eros eget velit. Donec ac tempus ante. Fusce ultrices massa. Fusce aliquam, purus eget sagittis vulputate, sapien libero hendrerit est, sed commodo augue nisi non neque. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed tempor, lorem et placerat vestibulum, metus nisl posuere nisl, in accumsan elit odio quis mi. Cras neque metus, consequat et blandit et, luctus a nunc.

SAMPLE UNORDERED LIST

- Commodus in tempor ullamcorper maeculis.
- Pellentesque vitae neque mollis urna mattis laoreet.
- Divamus sit amet purus justo.
- Pron mollis egestas, orci ac suscipit risus posuere loremous.

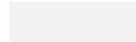


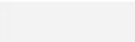
SAMPLE ORDERED LIST

- Commodus in tempor ullamcorper maeculis.
- Pellentesque vitae neque mollis urna mattis laoreet.
- Divamus sit amet purus justo.
- Pron mollis egestas, orci ac suscipit risus posuere loremous.

SAMPLE PARAGRAPH

Nunc facilis sagittis ullamcorper. Pron lectus quam, gravida et mattis vulputate, tristique ut lectus. Sed et lorem nunc. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae. Aenean eleifend laoreet congue. Vivamus adipiscing nisi ut dolor idlig dignum semper. Nulla luctus malesuada trisidunt. Class aptent tacit sociosque ad litora torquent per conubia nostra, per inceptos himenaeos. Integer enim purus, posuere at ultrices eu, placerat a felis. Suspendisse aliquet urna pretium eros convallis interdum.

Related Products



Customer Payment Page

Contact information

☐ Keep me up to date on news and exclusive offers

Shipping address

First name	Last name
Company (optional)	Address
Apartment, suite, etc. (optional)	City
Country/Region United States	Postal code

Shipping method

<input checked="" type="radio"/> Free Shipping	Free
<input type="radio"/> Standard Shipping	€10,00

Payment method

☒ Credit card

☐ PayPal

☐ Money Order

Billing address

☒ Same as shipping address

☐ Use a different billing address

ORDER SUMMARY

	Green juice 100 servings	\$69.95
--	--------------------------	---------

[Apply Coupon](#)

Subtotal	\$69.95
----------	---------

Shipping	--
----------	----

Total	USD \$69.95
-------	--------------------

Complete Purchase



Form Example— Customer Receipt

billcustomer	
Main Outlet	
Served by: Bill Customer at Main Register	
Receipt / Tax Invoice #1	
6 Nov 2019 12:34pm	
NALA DRESS / 6	
1 @ \$269.90	\$269.90
Subtotal	\$269.90
Additional Discount	-\$26.99
TOTAL (1 item)	\$242.91
Cash	
Wed, 6 Nov 19 12:34pm	\$250.00
Change	\$7.09
TO PAY	\$0.00
TOTAL SAVINGS	\$26.99



Grow repeat business with a loyalty program!

You can encourage customers to come back again,
and again, by letting them earn loyalty points
that they can spend in store. Enable under Setup >
Loyalty.

This message will only be printed during your trial.

Customer Copy

Implementation & Testing Plan

Sunrise Sports
Sichun (Sandra) Xu
352 Consulting, Systems Designer



Implementation Timeline



Date	Schedule
October 14th, 2019	System development and testing begins at 352 Consulting.
November 4th, 2019	System development and testing ends at 352 Consulting.
November 8th, 2019	Installation and implementation begins at Sunrise Sports.
November 11th, 2019	Transfer data documents at Sunrise Sports.
November 13th, 2019	Installation and Implementation ends, on-site system test occurs.
November 14th, 2019	System testing and Training Day 1 occurs.

Six Major Activities:

Coding

Testing

Installation

Documentation

Training

Support



Coding

- All the code is based on Physical design specifications made by System Analyst.
- Unit Testing begin and proceed in parallel when developing begins.

Testing Plan

Unit Testing/Integration Testing/System Testing



```
graph TD; A[Unit Testing/Integration Testing/System Testing] --> B[Security Testing]; B --> C[Performance Testing];
```

Security Testing

Performance Testing

Testing Timeline

Date	Plan
October 14th to November 4th, 2019	System development and testing at 352 Consulting by developers in simulating environment.
November 13th to November 14th, 2019	System testing at Sunrise Sports by Vendors, Bank and Bill.

Application Testing

Test 1:

Tested by: Technical and developer

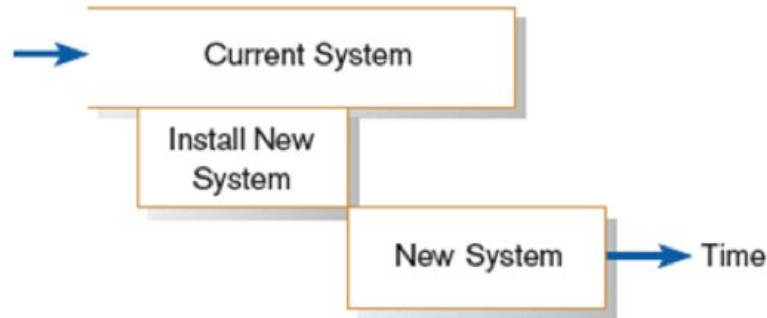
Date: Oct 14th

Seq	Action	Expected Results	Actual Results
1	Unit testing	Every module in the system runs successfully without any error.	Most modules were tested without error. Some modules were failed to be run and were fixed now.
2	Developer check out shopping cart online.	Developers check out their goods successfully.	The orders were submitted successfully.
3	Monthly inventory report	Specific inventory report is created by the system.	Bill and Vendors received the inventory report every month.
4	Manager retrieves lists of customers' orders	Manager's account will receive lists of order online by click	All customers' order submissions were retrieved correctly.
5	Safety testing: developers are hired to check, hack the system and payment webpage.	The firewall isn't being hacked and system stays safe.	Minor bug was found and fixed.
6	Performance testing	Developer can navigate between fields and pages.	The navigation is acceptable and smooth.

Test 2:**Tested by:** "Bill"/Vendors/Bank/**Date:** Nov 13th

Seq	Action	Expected Results	Actual Results
1	Unit testing	Every module in the system runs successfully without any error.	All modules were tested without error.
2	Online users check out shopping cart.	Users check out their goods successfully.	All the orders were submitted successfully.
3	Monthly inventory report	Specific inventory report is created by the system.	Bill and Vendors received the inventory report monthly.
4	Manager retrieves lists of customers' orders	Manager will get lists of order online by click	All customers' order submissions were retrieved correctly.
5	Safety testing: developers are hired to check, hack the system and payment webpage.	The firewall isn't being hacked and system stays safe.	Minor bug was found and fixed.
6	Performance testing	Bill and developer can navigate between fields and pages.	The navigation is acceptable and smooth.

Installation



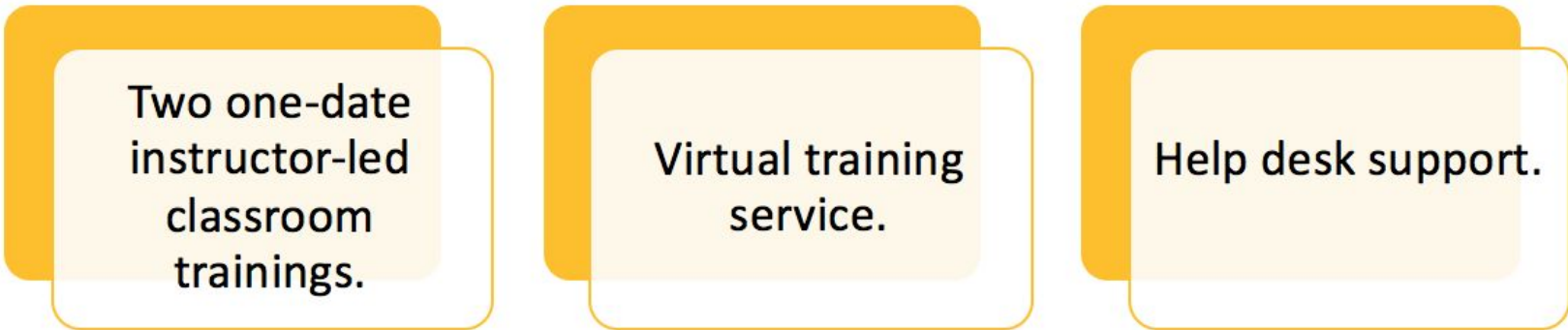
- **Strategy:** Parallel installation
- The information system we developed, installed and run while employees still keep the sales and inventory records by hand.

Documentation

System
Document

User Documents

Training & Support



Two one-date
instructor-led
classroom
trainings.

Virtual training
service.

Help desk support.

Training & Maintenance

Sunrise Sports

Melissa Marchetti


352 Consulting, Technical Director

Training

	Start	End	Purpose	Method	Recipients	Frequency
Training 1	11/14/19	11/14/19	Overview and practice of operation and functionality	Classroom/ One-on-One	Bill Customer	One Day
Training 2	11/15/19	11/15/19	Overview and practice of operation and functionality	Classroom/ One-on-One	Bill Customer + Employees	One Day
Training 3	11/14/19	Ongoing	Simulate use of POS system during a customer interaction	E-Learning	Bill Customer + Employees	Ongoing

Change Management & Maintenance Plan

- During project & after implementation starting December 9th, 2019.
- Ongoing on a monthly basis for up to 3 years after project completion.
- System Service Request Form submitted to the PM for changes requested during and after project completion.



**Sunrise Sporting Goods
System Service Request Form**

REQUESTED BY: Bill Customer ON DATE: 10 January 2020

DEPARTMENT: CEO's Office

LOCATION: Sunrise Sporting Goods Store; Topeka, Kansas

CONTACT PHONE: (785) 344-6756

CONTACT EMAIL: billcustomer@sunrisesports.com

Please place a "X" next to the box at left of the respective service request type and urgency.

Type of Request	Urgency
New System	Immediate, problem impacting business
System Enhancement	Problems can be circumvented
<input checked="" type="checkbox"/> System Error Correction	<input checked="" type="checkbox"/> Business losses can be tolerated

PROBLEM EXPLANATION:
I am receiving calls from vendors looking for payment for new inventory orders. When a sale is made that causes the item's inventory to reach its minimum threshold, an inventory order is placed automatically, but for some reason is not automatically paid for. It appears the bank is no longer routed to the vendor accounts.

SERVICE REQUEST:
I request a thorough analysis of our current POS operating system with the intent to correct current errors in the system. After maintenance, the system should return to its normally functionality without impeding on daily business.

352 CONSULTING LIASON: Aminata Sonogo, 352 Consulting, Project Manager
SPONSOR: Bill Customer, CEO, Sunrise Sporting Goods

TO BE COMPLETED BY CHANGE MANAGEMENT ADVISOR

Check One:

- ☒ Request Approved
- ☐ Recommend Revision
- ☐ Suggest User Development
- ☐ Reject for reason:

Assigned To: Melissa Marchetti, 352 Consulting Technical Director
Start Date: 12 January 2020

Thank you!

Questions?

