

Botler's Automated Template Creation Requirements

Target release	1.0
Epic	/Jira Epic
Document status	DRAFT
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Technical writers	@ writers
QA	@ qa

Background and Strategic Fit

We all know that not only is automation on the rise, but also the time employees spend on repetitive tasks. A [recent survey](#) of employees showed that 70% of workers say the biggest opportunity of automation lies in reducing time wasted on repetitive work. Most of our employees would rather spend more time on high-value tasks, not to mention the [benefits of order processing automation](#).

Who's it for ?

- Fashion Retail Merchandisers - those whose time is being increasingly spent more and more on repetitive tasks
- Fashion Retail Buyers and Planners - those whose time is being taken away from extensive research that allows the business to stay ahead

Assumptions

Why Build It?

- In order to move retail companies into a more painless order processing process that reflects other industries as well
- To relieve employees of having to do repetitive tasks and allow them to focus on more high valued tasks
- Opportunity to expand potentially into a product suite suited for improving retail processes
- Tech-risk very low

Requirements

#	User Story Title	User Story Description	Priority	Notes
1	Corporate Email Integration	A user wants to sign up via their corporate email.	HIGH	
2	Groups and Permissions	A user wants to allow certain individuals in specific organizations within the company to have access to certain data and functionalities.	HIGH	<ul style="list-style-type: none">• We need to talk with Jane Doe, VP of Products at Jane Doe Company, as their department has an ideal breakdown throughout the org.

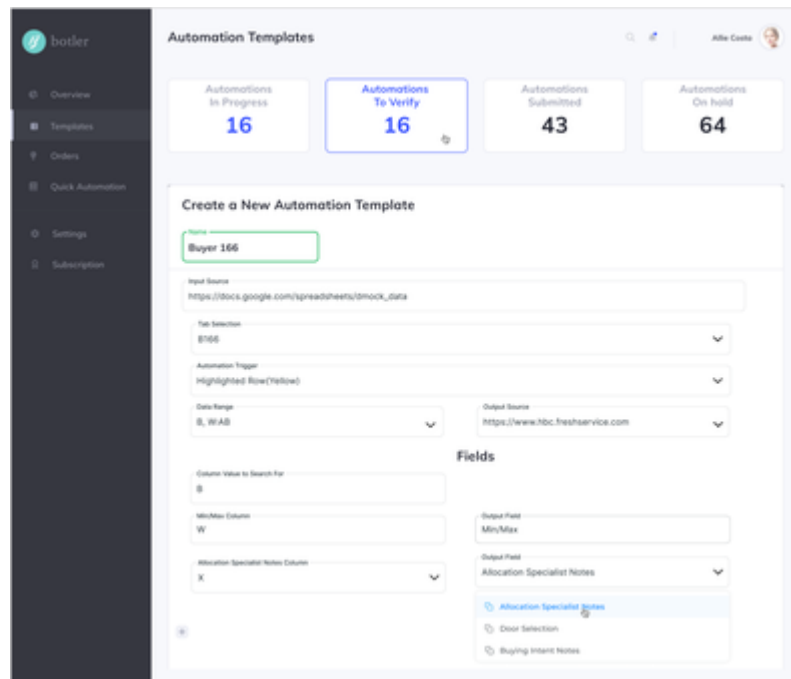
3	Order Submission Service Integration	A user wants to setup permissions to allow Botler to access their account on the company's order submission site.	HIGH	<ul style="list-style-type: none"> We need to ensure we're able to: <ul style="list-style-type: none"> access users' accounts with needed permissions
4	Template Creation - Input	A user wants to designate a specific input source for data collection.	MED	
5	Template Creation - Input Data Specification	A user wants to specify triggers and data cells for automation to detect.	HIGH	
6	Template Creation - Output	A user wants to designate a specific output source for data collection.	HIGH	
7	Template Creation - Output Data Specification	A user wants to specify where to allocate each input data field to the output source's field(s).	HIGH	
8	Template Saving	A user wants to save this template(e.g vendor) by name to use for automation.	MED	<ul style="list-style-type: none"> We need to make sure we're able to: <ul style="list-style-type: none"> access each data field end-to-end (input to out)
7	Template Product Order(PO) Submission	A user wants to submit POs generated by automated template to the output source/site's field.	HIGH	<ul style="list-style-type: none"> The key things we need to ensure: <ul style="list-style-type: none"> data across sites or documents are obtained correctly

User interaction and design

Description

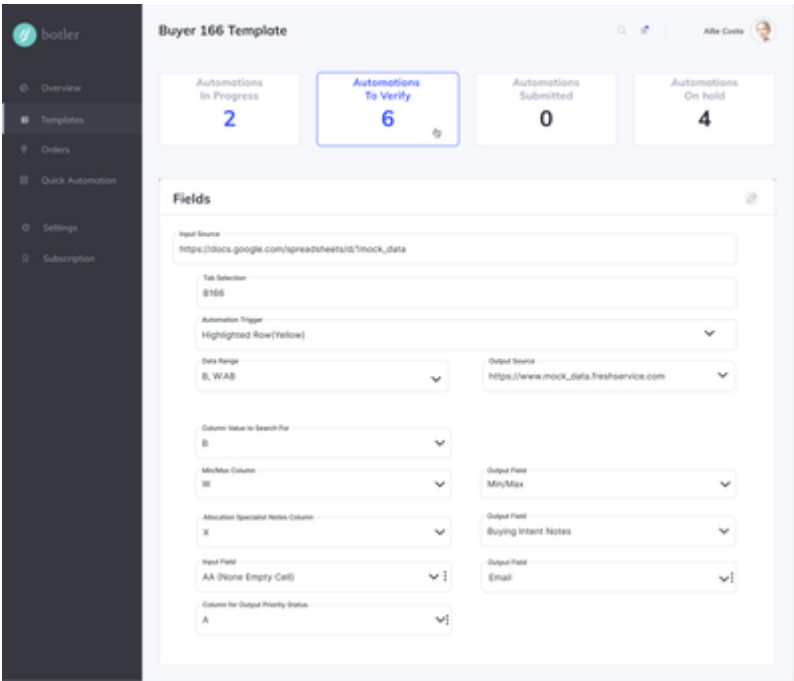
Template Creation - Output Data Specification

Mockup

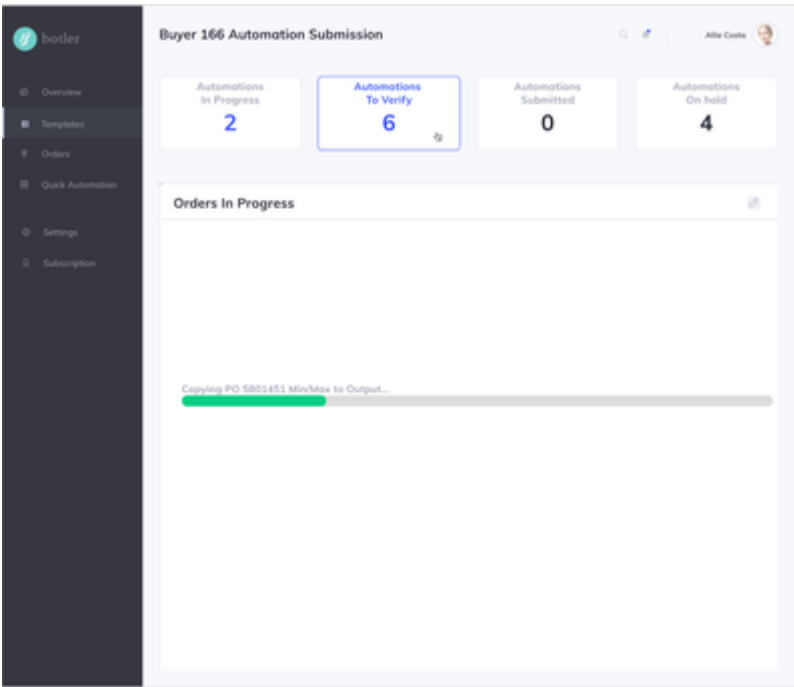


The screenshot displays the 'Automation Templates' dashboard in the Botler application. The dashboard includes four summary cards: 'Automations In Progress' (16), 'Automations To Verify' (16), 'Automations Submitted' (43), and 'Automations On hold' (64). The 'Automations To Verify' card is highlighted with a blue border. Below the dashboard is the 'Create a New Automation Template' form. The form includes a 'Name' field with the value 'Buyer 166'. The 'Input Source' is a Google Sheet URL. The 'Tab Selection' is 'E166'. The 'Automation Trigger' is 'Highlighted Row(Yellow)'. The 'Data Range' is 'B: WAB'. The 'Output Source' is 'https://www.hbc.freshservice.com'. The 'Fields' section shows 'Column Value to Search For' as 'B', 'Min/Max Column' as 'W', and 'Allocation Specialist Notes Column' as 'X'. The 'Output Field' is 'Min/Max'. The 'Allocation Specialist Notes' field is highlighted in blue. The 'Door Selection' and 'Buying Instant Notes' fields are also visible.

Template Saving



Template Creation - Output Data Specification



Open Questions

Question	Answer
How might we make users more comfortable with this automated submission process ?	We'll allow users to have the option verify product orders(PO) the template generated before submission.

Out of Scope

- Add e-mail/comments to automation template
- Add priority level customization
 - If Input Source's designated field is marked xyz then Priority on output source is xyz