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# *Email Notifications and Communication Detail Design Document*

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Document Revision History

This chart tracks the changes introduced by the revisions to the document as the project progresses through the stages of the System Development Life Cycle (SDLC).

| Version | **Date** | **Description (Changes Made)** | **Author(s)** |
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| 1.0 | 05/19/2010 | Initial Draft | Sterling |
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| 1.2 | 06/28/2010 | Feedback incorporated | Sterling |
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Related or Reference Documents

| Document Name | Description | Owner | Location |
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| SCI\_Xpedx Solution Definition Document v1.5 | Solution Definition document | Sterling Commerce |  |
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# Introduction

## Document Purpose

This document is the governing functional design document for Email Notification and Communication functionality. It presents significant decisions and constructs used in developing the functionality. Testing, builds, configuration management are not covered in this document.

The document will also serve the purpose of keeping a list of assumptions that were made during design discussions.

## Document Audience

This document is intended for management and technical staff working on this project, xpedx IT and Business, webMethods, Legacy(MAX and ACCESS), HP, IW, xpedx/IP Network Team. Sterling will use the document during design and configuration for design consideration.

# Email Notifications and Communication

## Functions & Solution

Email events are used throughout the system to notify users about the progress of the orders, communicate with the customer service, getting confirmation of things done by them on the website. They can also send on – demand emails to their friends or to themselves for reference.

Order confirmation emails are extremely important as they further reinforce your credibility and professionalism. The order confirmation email remind them of your guarantee and provide them with contact details should there be any queries or concerns.

## Order Emails

Order Notification emails are sent to the user to whom the order belongs. The user profile has options to opt-in and out for getting these emails. The following are the scenarios where emails will be generated by the system and will be sent out to the users.

* Orders Confirmation Email – This email is sent out to the user based on the user profile, when an order is placed by the user containing the details of the order. This is the view of the customer order. If the order response comes back with a Legacy order # the email will have that, if not and the response times out or errors out, the email will be sent out without the legacy order #. A copy of the email is sent out to the customer admins users based on their user profile. A copy is also sent out to the primary sales rep , CSR1 and CSR2 of the bill to customer if the send email confirmation flag is checked respectively in addition to the user and the additional email addresses selected during checkout.
* Orders Cancellation Email – This email is sent out to the user when an order is cancelled by the user based on the user profile. A copy of the email is sent out to the customer admins users based on their user profile.
* Orders Shipment Email – This email is send out to the user when the status of an order is updated to Shipped in the order update message to Sterling based on the user profile. A copy of the email is sent out to the customer admins users based on their user profile.
* Orders Backorder Email – This email will be sent out to the user when the status of an order is updated to Backorder in the order update message to Sterling based on the user profile. A copy of the email is sent out to the customer admins users based on their user profile.
* Order Approval Request to Approver Email – Email sent out to the approver asking to take an action.
* Order Rejection Email – Email sent out to the owner of the order that the order approval request has been rejected.

## Admin E-mails

* New Buyer Added - E-mail sent to the customer Admin to let them know a new buyer has been added to the account.
* Buyer Removed - E-mail sent to the customer Admin to let them know a buyer has been removed from the account.
* User Profile Email Address Change – E-main sent out to the user notifying the email address on his profile has been changed.

## Order Approval Emails

When an order goes for approval, an event is invoked which in turns invokes the YCD\_Order\_Approval\_Email\_8.5 service that generates an e-mail, which is sent to the approver of the order and the user who placed the order, to indicate that the order is on hold, pending approval.

A sample implementation of the YCD\_Order\_Approval\_Email\_8.5 service, used to generate an e-mail when an order is on hold, pending approval, is illustrated in the following figure.



When the approver approves or rejects the order, an e-mail will be sent to the approver of the order and the user to whom the order belongs stating that the order has been either approved or rejected. Once approved, the order is placed with Legacy and an order confirmation email will be sent out to the user in addition to the approval email.

## User setup / Forgot password Emails

When a new user is setup, an email is sent out to the user with the generated password. For password reset, if the ‘**Confirmation Is Required On Password Reset’** rule is enabled, an email is sent out to the user containing the password request id. The password reset request raises an event which in turn calls the YCD\_Send\_Reset\_Password\_8.5 service to generate an e-mail containing a generated URL. This URL is sent to the user's e-mail address.

## Web forms related Emails

These emails relate to the actions where a user fills out a form on the site and hits the submit button. At that point an email is sent out to xpedx admin group (email address needs to be defined by xpedx) as well as the user confirming the on-line form was submitted successfully. Following forms filled on the web will result in email generation as part of confirmation.

* Samples
* Returns
* Contact Us.
* New customer registration

## On Demand Emails

On Demand email requests are initiated by the users from various pages on the site and are not system generated. For e.g, refer an item to a friend from the product detail page. For BR1 these are the on –demand emails, as they are ootb. The following is the list of on-demand emails for the xpedx solution, additional ones needed need to be planned out as time permits or BR1.1:

* Email a Cart
* Email an Order
* Refer an item to a friend (from product detail page)
* Forgot Password Reset
* Receive Order Update Email by CSR – Looks like this needs to be an on-demand email and it is a manual activity for CSR to send an email. They can use the send email button from the order detail page.

## Misc Emails:

* New Ship to created through customer batch needs email notification to customer admin of the bill to.

## Email Formats

The following email formats will be supported. The preference for the email format is set at the user and customer profile. The user profile value overrides the value set at the customer profile. HTML will be the default format if nothing is set.

* Text
* HTML

## Validation of E-Mail Addresses

Sterling Web validates the e-mail addresses to which a user has to send the order details based on the following criteria:

* The first character must be an alphabet.
* The symbol @ must be present.
* There must be at least one character before @.
* There must be least one character between @ and the period.
* There must be between 2–4 characters after the period.
* There must not be spaces in the e-mail address.
* There must be a semi-colon (;) between addressees.

If any of these criteria is not met, Sterling Web displays an error message to notify the user of the incorrect criteria.

## Master System

Sterling is the master of system for sending the email mentioned in the document.

## Implementation Details

## Entity objects.

* NA

## Actions involved and Functions

* XPEDX\_EmailHandler.java – This action class is responsible to handle all the on – demand emails and call the respective email component service.

## API Details

* NA

## Process Flow

Not Applicable

## Screen Shot

NA

## Open Questions

1. Order Change notification emails – Order Can change due to several reasons and there will be multiple order updates from backend which might trigger this email event. Do we really need to send order change /update emails to the customers? The JAD session notes says, send order update email if the order is changed by CSR. Can you please explain what is needed? Answer: Order update emails for every update to the order is out of scope because of the volume, that’s why we identified some based on status which are mentioned above.
2. Can we have the format for the various email templates?
3. New shipto setups are done in the back end. The data comes to Sterling through batch feed, do you want us to send emails to the customer admin as soon as we insert a new ship to record. Answer: Yes. Email notification is needed.
4. Refer an item to a friend from product detail page, can we get a screen from IW for this.
5. Do we intend to send the order confirmation email to the users even if the order did not go through Legacy and we do not have a Legacy order # associated with the order? This is a scenario where the order is on hold within the sterling system. Answer: Yes, if the response comes back with a Legacy order # the email will have that, if not and the response times out or errors out, the email will be sent out without the legacy order #.
6. What is Order Delivery Email?
7. Need to know the process of notifying the Sales Rep / CSRs when the user places an order. Answer: Send copy of the order confirmation email to Primary Sales Rep of the bill to. There will be a flag in the customer profile which will control whether to send or not.

## Assumptions

1. PDF attachments in the emails will not be supported.
2. We do not keep a track of the emails sent out the customers/users. If xpedx want to keep a trace of all the emails sent from the system, they need to get the log information from their SMTP logs.

# Glossary of Terms

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| S. No. | Term | Definition |
| 1. | Entity Object | Database and Java entity objects to store the required data. |
| 2. | Action Class | Struts controllers which redirects the parameters and does some business logic before calling the business APIs. |
| 3. | BR1 | Business Release 1 |
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