Phase II

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| **Not on web**   |  |  |  | | --- | --- | --- | | **Transaction** | **Who uses it?** | **Where on web do you go to initiate?** | | 010 – New distributor | CE, CR, Sales  2 workflows w/e 5/8 | Dummy login brings you to My account, blank profile page | | 020 – Customer maintenance - Parts are on web (eg basic address info) but missing pieces are credit terms, CR acct ownership, etc., contact lists. | CE, CR, Sales  63 workflows w/e 5/8 | My account profile and My account Workgroup | | 025 – Credit – Need to route something to finance (eg CR communicates big order coming in, might exceed limit) | CE and CR (CR more than CE)  6 workflows w/e 5/8 | My account | | 031 Sample order entry | CE, CR, Sales . | Shop results, expanded description, add third tab called “Samples” | | 040 – Sales order change | All of CE. | Order history - | | 041  EXPEDITE (type of sales order change) |  |  | | 044 Tie in attachment | CE – 243 workflows w/e 5/8 |  | | 045 Backorder – an email that comes into queue from purchasing or inventory management w/either new ship date or instructions to move order based on inventory not being in default warehouse w/in 72 hrs | All of CE – 113 workflows week ending 5/8 | Bundling logic – expand alternate warehouse choices. | |  |  |  | | 046 REVIEW EDI ORDER – like an order that is on hold that won’t print until CE touches | All of CE | A cart that is in Checkout. | | 060 POD RECEIPT – trucking cos that don’t have tracking links, you call, speak to someone who faxes hardcopy of POD to queue, pulled from queue and routed to customer | All of CE | Faxed doc automagically appears in order history, tracking v. going into queue, and gets emailed to customer (or customer gets notification to go to website to see it). Needs work. | | 070 STOCK CHECK – where inventory is now | All of CE, CR, Sales – 67 workflows w/e 5/8 | Expansion of availability pop-up | | 075 MRP DISPLAY – when inventory will be coming in (mostly imports), when POs were cut (GONE from workflow requests) | All of CE; other depts on occasion – 0 workflow reqs W/E 5/8. | Expansion of availability pop-up | | 080 PRICE INQUIRY advanced – ability to toggle between all PSPs (Feeder list #4) | All depts., 134 workflows W/E 5/8. (Tina’s theory is this usage is related to Feeder List item on row 33; if you don’t have item # it’s faster to type “LF 12 x 18…” into Avante than plug dimensions into widget. Esp. true if you have long list of items to price.) | We’ve discussed PSP being in customer profile/preferences (my account); another place is Login box (Tina swears it used to be there on old site.) | | 111 - NS Made and Outside Buy Quotes; 112 ns quote change | CE and CR. 276 workflows W/E 5/8; 36 NS quote changes. | Shop | | 140  PRINT QUOTE *advanced* Tina thinks the “advanced” functionality is no longer needed; this IS still needed for as long as NS quotes are still only in Avante | 8 workflows w/e 58; probably for NS quotes. | Saved items; shared carts/items. | | 160  INVENTORY LOCATION | Not needed, not being used | Eliminate | | 170 CR/DB MEMO ENTRY – credit memo entry we feel customer deserves some/all $ back; we enter credit on their account (negative $)Debit is when we charge a chargeback, typically for freight | CE handles both; but Debit should probably be handled by Finance not CE  101 workflows w/e 5/8 | Order history – or new finance section containing billing debit credit info??? | | 180 CR/DB MEMO CHANGE | Changes to 170s above  4 workflows w/e 5/8 |  | | 190 RA ENTRY | CE only - 77 workflows w/e 5/8 | Order history | | 200 RA CHANGE | CE only - 36 workflows w/e 5/8 | Order history | | 210 RA inquiry | CE only - 11 workflows w/e 5/8 | Order history | | 220 RA acknowledgment – resending paperwork for an LTL pickup if paperwork from original RA did not get there | CE only - 2 workflows w/e 5/8 | Order history | | 225 Carrier and freight issues | CE and CR – 4 w/e 5/8 |  | | 230 General | CE and CR - 312 workflows w/e 5/8 |  | | 240 New products – could be anything but may not need due to our increased NS quoting??? For things we don’t want to quote? | CE and CR – 5 w/e 5/8 |  | | 250 General Web hold | CE only. 43 w/e 5/8 | On the web (in CE BS Box), but would be better if we could take a cart as far as possible through checkout process and put it on hold w/out locking things up for customer | | |
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|  | **On the web** |
|  | * 030  SALES ORDER ENTRY - except samples * 070  STOCK CHECK *basic* * 080  PRICE INQUIRY *basic* * 110  CUSTOM QUOTE ENTRY - except NS made/outside buy * 120  CUSTOM QUOTE CHANGE – ***Used 688 times week ending 5/8 -*** * 130  CONVERT QUOTE – NOW AUTOMATED FOR WEB ORDERS!!! ***404 week ending 5/8*** * 043  CHECK ORDER STATUS ***Used 527 times week ending 5/8; brings you to sales order display –far fewer keystrokes in Avante than website to get to the data being sought*** * 050  PROOF OF DELIVERY * 090  PRINT ACKNOWLEDGMENT – *Used 14 times this week.* * 140  PRINT QUOTE *basic (one at a time)* |