**WORK IN PROGRESS**

When a stock or MOD is saved, what is preserved? What happens upon retrieval? What happens if a change is made just after retrieval?

* All search parameters (e.g. dimensions, materials, etc.) are preserved when a stock or MOD item is saved. However, zip code is not considered an intrinsic part of either MOD or stock saved items; it is preserved solely to facilitate population of the widget when the item is retrieved the very next time.

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| --- | --- | --- |
| **Search parameters** | **Stock** | **MOD** |
|  |  | Preserved, stays same next time item is retrieved | If user changes this upon retrieval |
| * Product class
 | Yes | Yes | This is a new MOD |
| * Product category
 | Yes | Yes | This is a new MOD |
| * Dimensions, including gauge
 | Yes | Yes | This is a new MOD (unless there is only 1 quote, in which case user can opt to overwrite existing MOD) |
| * Zip code\*
 | Yes – for easy retrieval; not intrinsic | Yes – for easy retrieval; not intrinsic | This is a new quote for the same MOD |
| * Materials & additives
 |  | Yes | This is a new MOD (unless there is only 1 quote in which case user can opt to overwrite existing MOD) |
| * Color
 |  | Yes | This is a new MOD (unless there is only 1 quote in which case user can opt to overwrite existing MOD) |
| * Printing
 |  | Yes | This is a new MOD (unless there is only 1 quote in which case user can opt to overwrite existing MOD) |
| * Venting
 |  | Yes | This is a new MOD (unless there is only 1 quote in which case user can opt to overwrite existing MOD) |
| * Packaging
 |  | Yes | This is a new MOD (unless there is only 1 quote in which case user can opt to overwrite existing MOD) |
|  |  |  |  |
| **Result attribute** |  |  |  |
| * Price
 | No | Yes up to 14 days; after that, item repriced upon retrieval (same MOD, new quote) | N/A |
| * Quantity
 | No – always 1 case, etc. | Yes – for easy retrieval; not intrinsic | This is a new quote for the same MOD? This is the same quote for the same MOD?  |
| * Pack-out/put up
 | N/A | Yes | This is a new  |
| * Availability/lead time
 | No | No |  |
| * Price breaks
 | N/A | Yes |  |
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**MOD items vs. MOD quotes**

When a MOD is saved it will consist of its configuration details, i.e. all widget selections – product class, category, dimensions, materials & additives, color, printing, venting and packaging PLUS – pack-out/put up.

It will not

 except zip code, plus “pack-out” or “put-up” (e.g. items per roll or case) Quantity Ordered, Price Breaks and Freight Options are also exceptions (not part of the ‘item’).

The MOD item will be assigned a number – for ex: MOD 1234

1. The first quote for that item – the item configuration plus zip code from widget; resin pricing and 14-day clock; and quantity and price breaks from results area.

The quote will be assigned a number – for example 0001. Live quotes can be revised; if they are, they are versioned (for example 0001, v. 2.) Expired quotes can be requoted; when they are, they are given a new quote number (for example 0002), but remain associated with the original MOD (MOD 1234).

Therefore, each saved MOD item can have multiple quotes associated with it. When a user retrieves a MOD item from the Saved Items list, if there are multiple ‘active’ quotes associated with that item, they will need to select one of the quotes. If no active quotes, we will use the most recent expired/converted quote to send back through the widget to create a new ‘ashad’ quote with current day’s prices and a new 14-day clock.

Depending on what the user does once they retrieve a saved MOD item's quote, or whether or not the quote was converted or expired - when retrieved (brought back to the widget), quotes could be repriced (same underlying resin price and quote clock (14 - T)); spun off into new quotes linked to that MOD item (new resin price, new quote clock (T+14)); turned into a new MOD item; or left as is.

The table below details what happens when the system or the user changes an attribute of the original saved stock item or MOD quote; how saved MOD items will come to have multiple quotes associated with them; and how saved MODs can serve as a springboard for creating new saved MODs.

|  |  |  |
| --- | --- | --- |
| **Stock** | **MOD 1234 quote 0001, not expired, not converted** | **MOD 1234 quote 0001, expired or converted** |
| **1. Returning the item to the widget**Widget back populates w/original item parameters. **The Find button is disabled.** |
| Stock item shows as exact match with refreshed pricing and availability. | MOD item shows as exact match with refreshed availability and the quantity, price breaks, and count at the time the item was last saved. In place of “Made on Demand,” user will see MOD item number assigned at time of saving, unless user added a part number, in which case, that will display. Does UI need to include anything like a quote number or some cue that this is a specific quote? - SP 9-19-13 I’m starting to think that it would be beneficial to show the quote# along with the MOD Item#. I think it’s going to be confusing to the customer if they have multiple active quotes for a MOD Item# (ie, to 3 zip codes with diff qtys) without know which quote they are working on. |
| * **Pricing shown is based on original resin pricing, with whatever time remains on quote clock (14-T) for quote 0001**
 | * **Pricing shown is based on current resin prices.**
* **A new quote (0002 v. 1) is assigned to this MOD item, with a new quote clock (T+14). What happens to the expired quote? (0001) I am guessing it remains attached to MOD 1234. YES Q: Users can delete MODs from their saved items lists; can they delete individual quotes? NO … we will not let customers delete our quotes, which are needed for internal reporting and audit trail. The quotes will be purged as usual (we have 3 years of history today but may shorten this window when we convert historical quotes for go-live). When customer deletes a MOD Item, we will just flag it internally to stop it from displaying, but won’t actually delete it.**
 |
| * **What happens when the user saves or adds to cart at this point?**
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| **Saving is not necessary to preserve any of the refreshed attributes – they were either autosaved when the item was retrieved, or they refresh every time the item is retrieved anyway. Clicking “save” is an opportunity to modify tags, or the part number in the case of MODs; saved item dialog box opens with original tags (and optional part number if applicable). Any refreshed attributes carry through to the cart. Q: When a saved item is shared at this point, is the user presented with the saved item dialog box after clicking send?** |
| **2. Making changes**  |
| **2a. Price breaks (MOD only) or quantity in results** |
|  |  |  |
| Pricing and availability refresh again. They are autosaved. | We will reprice (using original resin prices) and save the quote (0001 – v. 2) without any further prompting of the user or action on their part. | We will create a new quote linked to the original MOD item number without any further prompting of the user or action on their part. Q: In addition to the one created when the item was pulled into the widget at step 1? Or are we really saying we will reprice and autosave “0002” created at step 1? If we had just created the ashad quote, we will reprice and autosave. |
| Lower price break increments may drop off if new quantity exceeds them. (For example, if the orig quantity = 25, first price break was 50, user changes quantity to 60, the 50 price break will drop off). |
| * **What happens when the user saves or adds to cart at this point?**
 |
| **Since changes are autosaved upon being made, clicking “save” is just an opportunity to modify tags, or the part number in the case of MODs; saved item dialog box opens with original tags (and optional part number if applicable). Any changed attributes carry through to the cart.**  |
| **2b. Zip code in widget** |
| Find button re-enabled. Must click Find to refresh result. Once clicked, without any further prompting, search returns the same stock item, with the price from step 1, but possibly different availability (warehouse of origin, ship date, inventory, etc.) | Find button re-enabled. User must click Find to refresh result. Once clicked, user is prompted to answer question regarding intent for this quote (0001) – Is it your desire to: 1. revise quote 0001 with this change, or
2. create a new quote (0002) with this change?

Answering ‘a’ will reprice the quote based on original resin price and keep quote clock @ 14-T (revised quote is 0001 v. 2).Answering ‘b’ will create a new quote (0002 v. 1) attached to MOD 1234, based on today’s resin prices with a new quote clock @ T+14. | The prompts here are identical to those on the left, except that by this time, we now have two quotes for MOD 1234: 0001 (expired and not showing here) and 0002 (created at step 1): Is it your desire to:1. revise quote 0002 with this change, or
2. create a new quote (0003) with this change?

Answering ‘a’ will reprice the quote (0002 v. 2) -resin pricing and quote clock have already been reset at step 1.Answering ‘b’ will create a new quote (0003 v. 1) using same pricing and clock as for 0002 v 1.**I wonder if we should just assume that they are changing the zip code on the newly created ‘ashad’ quote. Not sure why they would want to create 2 quotes in this step???** |
| * **What happens when the user saves or adds to cart at this point?**
 |
| **In all 3 cases, changes are autosaved upon being made. Therefore, clicking “save” is just an opportunity to modify tags, or the part number in the case of MODs; saved item dialog box opens with original tags (and optional part number if applicable). Any changed attributes carry through to the cart.** Q: Will the cart UI need to indicate not must MOD # but quote number? I think it should indicate both for clarity |
| **2 c. Dimensions including gauge; materials and additives; color; printing; venting; packaging (any widget parameter other than zip code on its own) or packout (count/feet per roll or case) in search results area. These are considered changes to the “makeup of the item itself” whereas the others at steps 1, 2a and 2c are not.**  |
| The Find button is re-enabled.  Other widget parameters may reset to defaults (they must reset if the user changes level 1 (e.g. bags v. sheeting) or category (e.g. layflat v. gusseted). Once the user changes or accepts the remaining widget parameters and hits Find ...  |
| Exact stock matches, if any, will be returned.User must save in order to preserve it their Saved Items list.  | If there is only one quote linked to MOD item 1234…When "Find" is clicked, we will ask them if their intent is 1. to change MOD 1234 itself, or
2. to create a new MOD item.

If the answer is ‘a’ we will return a reconfigured version of MOD 1234… which has a revised quote (0001 v. 2) or a new quote (0002 v. 1)? Revised quote (0001 v. 2) User must click save link to preserve configuration changes and new quote? Would just be change to existing quote in this case … I wouldn’t think they need to click ‘save’ since they’ve told us to change MOD 1234.If the answer is ‘b’ we will return a new, un-numbered MOD result. When and if it is saved, it will be given a number (MOD 5678) and its first quote (98765 v. 1). User must click save link to preserve new MOD and quote? Again, is it enough that they’ve already told us to create the new MOD Item (and quote)?If there is more than one quote linked to MOD 1234…Regardless of the status of those quotes, we will assume the user is creating something new. We will not offer any prompts when Find is clicked, and we will automatically return a new MOD item (with its own first quote). Does the user need to click save to save this new MOD?  |
| * **What happens when the user clicks the save link?**
 |
| Saved Item dialog box starts from scratch, no tags checked. Adding to cart just adds to cart. Original saved item remains intact. | **If the user answered ‘a’ above, Saved Item dialog box will open with original tags (and optional part number if applicable). The original saved item will be overwritten (it will still be MOD 1234).****If the user answered ‘b’ above, or the MOD had more than one quote, the Saved Item dialog box with start from scratch with no tags checked. The original Saved Item (MOD 1234) will remain intact.** |
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