

Full Color Print 2.0 Use Case Scenarios

Last Update: March 8, 2016

DRAFT

Contents

Assumptions and Development Criteria	1
1. ACTORS.....	1
2. ENTRY POINTS	2
2.1. GROUPS.....	2
2.2. ACCESS POINTS	3
2.3. ACCESS RIGHTS	3
Use Cases and Test Plans	5
3. NAVIGATION/SITE FLOW DOT-COM.....	7
3.1. HOMEPAGE	7
3.1.1. General Layout.....	7
3.1.2. Header	8
3.1.3. Categories	8
3.1.4. Footer	9
3.1.5. Prices/Price Quote.....	11
3.1.6. Account	13
3.1.7. Help, Privacy, and Other Pages	31
3.1.8. Login/Logout	32
3.1.9. About.....	32
3.1.10. Products.....	32
3.1.11. Order Status	32
3.1.12. Privacy Policy	33
3.1.13. Terms and Conditions	33
3.1.14. Contact.....	33
3.1.15. Site Map.....	33
3.2. DOT-COM PRODUCT NAVIGATION.....	34
4. NAVIGATION/SITE FLOW RETAIL: LITE/FULL	34
4.1. HOMEPAGE	34
4.1.1. General Layout.....	34
4.1.2. Header	35
4.1.3. Categories	35
4.1.4. Footer	36
4.2. RETAIL PRODUCT NAVIGATION	37
5. PRODUCT STUDIO	37
5.1. DRAG & DROP STUDIO (PRINT ITEM STUDIO).....	37
5.1.1. Image Upload.....	40

5.2.	STAMPS STUDIO W/ ADVANCED DRAG & DROP	48
5.3.	DATERS STUDIO	50
5.4.	ROUND STAMPS STUDIO	52
5.5.	NOTARY STAMPS & EMOSSERS UPLOAD STUDIO	55
5.6.	ENGRAVED STUDIO	56
5.7.	IMPRINT AREA STUDIO (FORMS)	56
5.8.	BLEED PREVENTING STUDIO – SELECT DELIVERY & INSTANT PRODUCT	57
5.9.	CORPORATE KITS DATA ENTRY AND PREVIEW PAGE	58
5.10.	EMBOSSER STUDIO	59
6.	PRODUCT CONFIGURATION AREA	60
6.1.	BUSINESS CARDS	60
6.1.1.	Delivery Business Cards	60
6.1.2.	Instant Business Cards	60
6.2.	STATIONERY	60
6.2.1.	Delivery Envelopes	60
6.2.2.	Delivery Letterhead	61
6.3.	Stamps	61
6.3.1.	Pre-Inked and Self-Inking Stamps	61
6.4.	Business Envelopes	61
6.4.1.	Delivery #10, #9 and #6-3/4 Envelopes	61
6.4.2.	Catalog Envelopes	61
6.5.	Forms	62
6.5.1.	Standard or 1 Color Custom Forms	62
6.6.	Labels	62
6.6.1.	Advertising & Weather Resistant Labels	62
6.6.2.	1 Color Imprint Mailing Labels	62
6.7.	Post-it-Notes®	62
6.8.	Folders	63
6.9.	Badges	63
6.10.	Yard Signs	63
6.11.	Magnetic Signs	63
6.12.	Banners	63
6.13.	Raffle Tickets	64
6.14.	Plastic Cards	64
6.15.	Desk & Wall Signs	64
6.16.	Vinyl Decals	64
6.17.	Note Cards	64
7.	CONTROL PANEL	65
7.1.	CONTROL PANEL LOGIN	65

7.1.1.	Retail Control Panel Login	65
7.1.2.	Dot-com Control Panel Login.....	66
7.2.	CONTROL PANEL FUNCTIONS	66
7.2.1.	Orders.....	66
7.2.2.	Reports	77
7.2.3.	Dot-com Coupons	83
7.2.4.	Release Orders	87
7.2.5.	Retail Order Monitor.....	92
7.2.6.	Customer Information.....	95
7.2.7.	Quotes	96
7.2.8.	Associate Tools.....	97
7.2.9.	Retail Manual Order Release.....	100
7.2.10.	Control Panel Saved Orders.....	101
8.	HISTORY/LEGACY ORDERS	102
9.	CONNECTIONS AND COMMUNICATIONS: STAPLES AND TAYLOR.....	102
9.1.	DOT-COM KANA CONNECTION/POW ENCRYPTION PROCESS.....	102
9.2.	Dot-com CHEETAH MAIL DART TAGS	103
9.3.	RETAIL CONNECTION TO RELEASE ORDERS (OMS)	103
9.4.	WEB ANALYTICS	104
9.5.	BDP REWARDS DISCOUNT PROCESS.....	104
10.	CHAT.....	106
10.1.	RETAIL CHAT	106
10.1.1.	Requested Chat	106
10.1.2.	Proactive Chat.....	107
10.2.	Dot-com CHAT	107
11.	SEARCH.....	108

Assumptions and Development Criteria

This section describes the actors to be executing the cases, expectations of each actor, entry points for interaction, and means/requirements of access.

1. ACTORS

Retail and sales-facing Control Panel and dot-com portal users include:

- **End Users**
Utilize dot-com portal to view products, create and place orders, and manage accounts.
- **Product Solution Sales (PSS) Representatives**
Place orders on behalf of a customer through dot-com¹
- **Retail Store Associate**
Assisted sale using Retail Full or Lite
- **MCC Customer Service**
Utilize the Control Panel to provide customer service support to Retail Stores and PSS
- **Staples Kana Team**
Utilize the Control Panel to release orders

Administrative actors include:

- **Data Entry**
Use Admin Tool and load product; might also access the sites to test their product loads
- **Developer**
Full access and control of everything related to the application
- **Testers**
Access and the ability to simulate all users to perform test cases

Some actors are retail-facing and administrative:

- **Staples Manager**
Utilize the Control Panel with greater access to make changes/view data/history and would also simulate users to UAT on the sites
- **Taylor Manager**
Utilize the Control Panel with greater access to make changes/view data/history and would also simulate users to test the sites

¹ PSS places orders on behalf of a customer on the Dot-com site only, bypassing some of the payment information, since they have already collected on the Staples system. Dot-com customers can place their own orders. If they are comfortable utilizing the site, there is no need for PSS to be involved.

2. ENTRY POINTS

2.1. GROUPS

Use Case ID	Description
	<p>Control Panel access will be provided with unique rights to the following groups:</p> <ul style="list-style-type: none">▪ Store Users▪ PSS and Dot-com Sales Team▪ Retail Stores, all Staples Stores▪ MCC Customer Service (Taylor Customer Service Agents that support PSS and stores)▪ Staples Kana Team and Dot-com Payment Processing Team▪ IT Developers and Testers▪ Staples Managers▪ Taylor Managers

Notes

Decisions regarding the user groups, user rights, and group members will be made according to the following (as of 12/1/2010).

- **Staples Store Users**
Users will be determined by the store XML feed.
- **PSS**
Users will be identified during the design/content phase and are not dependent to PRD approval.

Users added via View Sale Reps.
- **MCC Customer Service**
Users will be determined during the design/content phase and are not dependent to PRD approval.

Users added by developers prior to release.
- **Staples Kana Team**
Users will be identified during the design/content phase and are not dependent to PRD approval.

Users added by developers prior to release; need to decide if this should be a general login or if they need individual logins.
- **Staples Managers**
Users will be identified during the design/content phase and are not dependent to PRD approval.

Users added via View Sales Reps.

- **Taylor Managers**

Users will be identified during the design/content phase and are not dependent on PRD approval.

Users added by developers prior to release; includes Alissa Lawrence and Jaime Taylor

2.2. ACCESS POINTS

- Staples Store – Access via link in application. 1st access to Control Panel will require login for RIK & MPS. RIK will always require login, MPS after 1st access will not be required to login to the Control Panel. The RIK vs. MPS will be controlled by URL's that Staples will be responsible to load for the stores.
- PSS – Access Control Panel via direct URL w/ Login
- MCC Customer Service – Access Control Panel via direct URL.
- Staples Kana Team – Access Control Panel via direct URL w/ Login
- Staples Managers – Access Control Panel via direct URL or Retail Application via test store 9999.
- Taylor Managers – Access Control Panel via direct URL or Retail Application via test store 9999.

2.3. ACCESS RIGHTS

Unique access rights will be assigned to the user/actor groups listed above. Access rights will determine application views, ability to make changes, and product being displayed. The following uses case statements define the permissions for each group.

Note: Access and permissions for each group will need to be validated during the test phase; this document **DOES NOT** define how this validation will occur.

Use Case ID	Description
	Staples Store – Will have access to the following: <ul style="list-style-type: none"> ▪ Orders – View Orders & Files ▪ Submit Redo's ▪ Reorder Ability ▪ Quotes ▪ Associate Tools ▪ Saved Orders
	PSS – Will have access to the following: <ul style="list-style-type: none"> ▪ Orders – View Orders & Files ▪ Submit Redo's ▪ Reorder Ability ▪ Quotes ▪ Associate Tools

Use Case ID	Description
	<ul style="list-style-type: none"> ▪ Saved Orders
	<p>MCC Customer Service – Will have access to the following:</p> <ul style="list-style-type: none"> ▪ Orders – View Orders & Files ▪ Associate Tools
	<p>Staples Kana Team – Will have access to the following:</p> <ul style="list-style-type: none"> ▪ Orders – View Orders ▪ Order Release
	<p>Staples Managers – Will have access to the following:</p> <ul style="list-style-type: none"> ▪ Orders – View Orders & Files ▪ Submit Redo's ▪ Reorder Ability ▪ Coupons ▪ BDP Offers ▪ Reports ▪ View Sales Reps ▪ Quotes ▪ Associate Tools ▪ Retail Order Monitor ▪ Retail Manual Order Release ▪ Saved Orders
	<p>Taylor Managers – Will have access to the following:</p> <ul style="list-style-type: none"> ▪ Orders – View Orders & Files ▪ Submit Redo's ▪ Reorder Ability ▪ Coupons ▪ BDP Offers ▪ Reports ▪ View Sales Reps ▪ Quotes ▪ Associate Tools ▪ Retail Order Monitor ▪ Retail Manual Order Release ▪ Saved Orders

Use Cases and Test Plans

The following nine use case sections have been organized to correlate with nine test plans that will contain the 24 testing scenarios². Use cases will be written to map easily to test case statements that can be organized and rearranged as needed to define a test.

The use case sections (which map to test plans) include:

- Navigation/Site Flow dot-com
- Navigation/Site Flow Retail: Lite/Full
- Product Studio
- Product Configuration Area
- Control Panel
- History and Legacy Orders
- Connections and Communications: Staples and Taylor
- Chat
- Search

These use cases are to provide the basis for nine test plans, with the nine test plans to be organized to support the following 24 test scenarios:

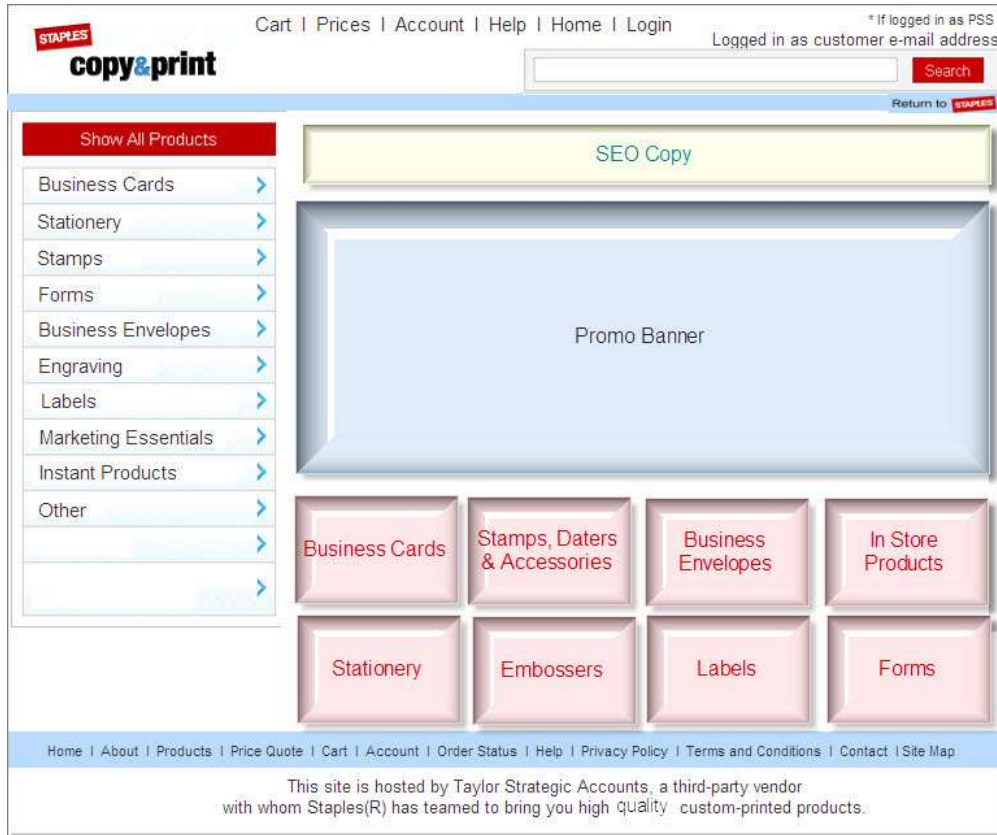
- Access homepage , do the following operations no login:
- Access homepage , do the following operations logged into My Account feature:
- Access Control panel with PSS account , do the following operations
- End-User reorder no Studio changes(requires login)
- End-User reorder with Studio changes (requires login)
- PSS Rep. place new order on behalf of the customer (requires login to Control Panel to access the site in this mode)
- PSS Rep. place new order on behalf of the customer (requires login to Control Panel to access the site in this mode) while also being logged into the My Account feature
- PSS Rep. place reorder with no Studio changes on behalf of the customer (requires login to Control Panel to access the site in this mode and requires being logged into My Account feature)
- PSS Rep. place reorder with Studio changes on behalf of the customer (requires login to Control Panel to access the site in this mode and requires being logged into My Account feature)

² The number of test plans and test scenarios will be decided at a later date. This statement is simply intended to illustrate the connection between the organization of the use cases and the organization of the test plans.

- Retail Store places an order in the Retail site. (Studio already transitioned)
- Retail Store places and order in the Retail site with the customers email address. Customer logs into FCP dot-com My Account application to place a reorder of original item placed in Retail store.
- End-User new and save order no login
- End-User reorder and save order no login
- End-User view and load the saved order no login
- End-User new and save order logged into My Account feature
- End-User reorder and save order logged into My Account feature
- End-User User view and load the saved order logged into My Account feature
- PSS Rep. place new order and save order on behalf of the customer.
- PSS Rep. place reorder and save order on behalf of the customer.
- PSS Rep. view and load the saved order on behalf of the customer.
- Retail Store places an order and save order in the Retail site.
- Retail Store view and load a saved order in the Retail site.
- Retail Store places an order and save order in the Retail site with the customers email address. Customer logs into FCP dot-com My Account application to view and place a reorder of original item placed in Retail store.
- Retail Store view and load an order in the Retail site with the customers email address.

3. NAVIGATION/SITE FLOW DOT-COM

3.1. HOMEPAGE



3.1.1. General Layout

Use Case ID	Description
	The site will be capable of presenting Flash animations.
	The site will be capable of presenting Flash video.
	The masthead of the right navigation frame will display SEO Copy.
	A banner featuring promotions will display immediately below the SEO Copy in the right navigation frame.
	The most popular product categories will display immediately below the promotions banner in the right navigation frame.

Notes

- The site Home page will reflect the look and feel of the Copy & Print Micro Site more than has previously been the case.
- Staples didn't provide a style guide, so Taylor is assuming that the fonts, colors, etc. currently used on the Retail version of the application will be acceptable for the redesign.

- Not all in-store products will be shown on the dot-com site.

3.1.2. Header

Use Case ID	Description
	The header will be presented on every page in the process of the order.
	If a PSS rep is accessing the site, a star will appear in the upper right-hand corner of the site to let them know that they are engaged and can by-pass some of the payment information that will be outlined in payment section.
	If an end-user customer has accessed the site and logged in to their account, a message will display in the upper right corner of the Home page that reads, "Logged in as xxxxxxx@xxxxDot-com "
	If the Cart link is clicked, the user will be directed to their cart. The cart will display anything they have added or will display an empty cart if nothing has been added.
	If the Prices link is clicked, the user will be directed to a page that will organize the product offering and allow the user the ability to look at product pricing.
	If the Account link is clicked, and the user is not logged in, the site will present a login page.
	If the Account link is clicked, and the user is logged in, the user will be taken to their account options page.
	If the Help link is clicked, the user will be directed to the help page.
	If the Home link is clicked, the user will be directed to the Home page.
	If the Login link is clicked and the user is not yet logged in, the user will be directed to the login page.
	If the user is already logged in, this link will change to Logout.
	If the Logout link is clicked, the user will be directed to the logout conformation page.
	There will be a link or linked graphic to return the user to StaplesDot-com.

3.1.3. Categories

Use Case ID	Description
	Clicking on a category will direct the user to a sub-category page that features additional product details (This will serve primarily an information/research purpose, helping the user determine which product best suits their needs.).
	A mouseover submenu will display when the cursor is held over a category link/button.
	The mouseover submenu will allow the customer to drill further into the category. Example: Hovering over Business Cards link in the left navigation (or the Business Cards icon) will display a window that contains the business card subcategories (This allows the user to skip some clicks and go further into their desired product.).

Notes

- Need to determine how the products will be broken down w/ the final list of products that will go live for the 1st release. (Joint decision Staples & Taylor). This will be completed during the design/content phase and is not required for PRD approval.
- The left navigation bar will reflect the categories: we still need to determine how the products will be broken down w/ the final list of products that will go live for the 1st release. (Joint decision Staples & Taylor). This will be completed during the design/content phase and is not required for PRD approval.
- Each categories flyover links will need to be outlined here and will direct the user further into the order process. This will be determined during the design/content phase and is not required for PRD approval.

3.1.4. Footer

Use Case ID	Description
	The footer will be presented on every page in the process of the order.
	The absolute bottom of all footers will include the statement: “This site is hosted by Taylor Strategic Accounts, a third-party vendor with whom Staples® has teamed to bring you high quality custom-printed products.
	Scrolling over a category will engage a flyover that will allow the customer to drill further into the category. Example: Hovering over Business Cards in the left navigation will present a window that will have the Business Card subcategories allowing the user to skip some clicks and go further into their desired product.
	If the Home link is clicked, the user will be directed to the Home page.
	If the About link is clicked, the user will be directed to a page with informational text.
	If the Products link is clicked, the user will be directed to a products page that will list all categories and subcategories allowing the user to link to what they are looking for.
	If the Price Quote link is clicked, the user will be directed to a page that will organize the product offering and allow the user the ability to look at product pricing.
	If the Cart link is clicked, the user will be taken to their cart. The cart will display anything they have added or will display an empty cart if nothing has been added.
	If the Account link is clicked, and the user is not logged in, the site will present a login page.
	If the Account link is clicked, and the user is logged in, the user will be taken to their account options page.
	If the Order Status link is clicked and the user is not logged in, the site will present the account login page. If already logged in, will present the users orders where they can click into order detail.
	If the Order Status link is clicked and the user is already logged in, the site will will present the user orders where they can click into order detail.
	If the Help link is clicked, the user will be directed to a help page that will contain helpful information.
	If the Privacy Policy link is clicked, a new window will open with the following URL hosted on the on the StaplesDot-com website: http://www.staplesDot-

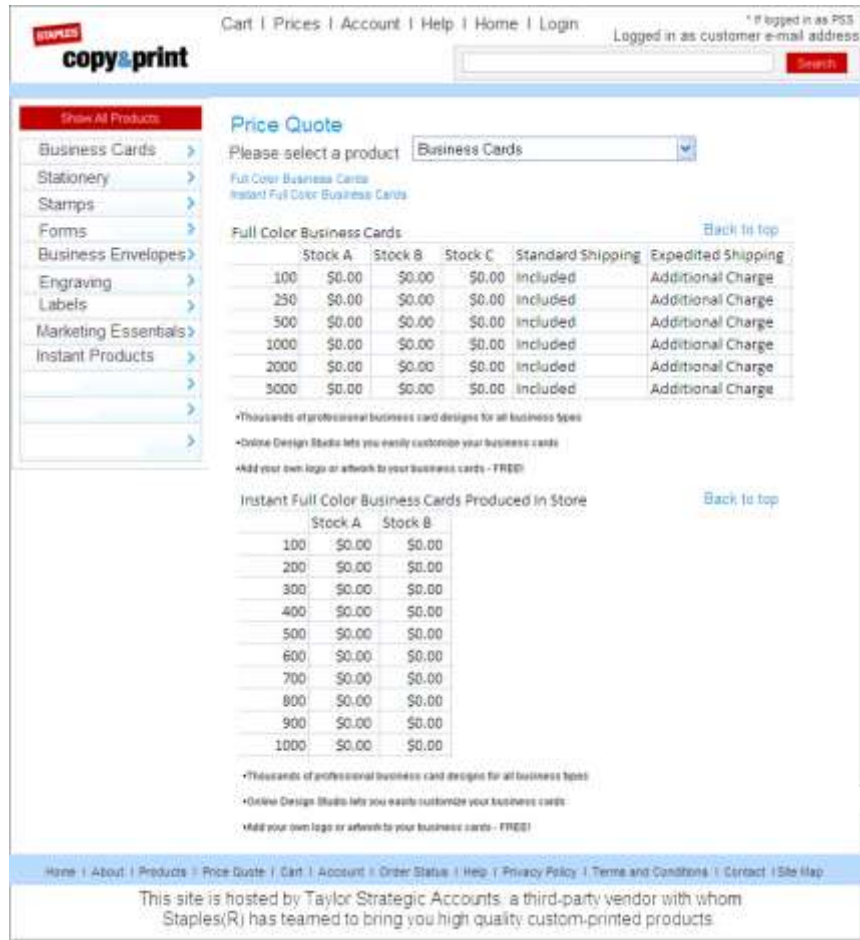
Use Case ID	Description
	com/sbd/content/help/policies/privacy.html.
	If the Terms and Conditions link is clicked, the user will be directed to a page that will explain the terms and conditions.
	If the Contact link is clicked, the user will be directed to a page that provides phone numbers to contact Staples for assistance and answers to questions.
	If the Site Map link is clicked, the user will be directed to a site map that will have links to pages and products. This page is necessary and will be kept.

Notes

- There will be an area for marketing. To put up banner promotions or informational marketing messages. Would be a nice to have this rotate if marketing desires to have multiple offers or messages at one time. This could be changed quickly and easily and would have the ability to link to special landing pages or other points in the application. These may need to differ between retail & dot-com.³

³ Not sure what to do with this statement. It seems to have been addressed in earlier statements about Flash animation in the header.

3.1.5. Prices/Price Quote



Use Case ID	Description
	A vertical navigation bar will be presented in the left frame.
	The page will be named Price Quote .
	The page will present a message that reads, "Please select a product." A drop-down list that includes the product categories will display along with the message.
	Clicking on a product category will display links to specific products. This will reduce the amount of time spent scrolling to products within the categories
	Each item will have a product description, quantities and pricing available, and will provide quantities and pricing for all product options.
	Standard Shipping is always included for delivery items.
	Expedited Shipping is always listed as an additional charge.
	There will not be any shipping options for instant products (because they are not delivered).

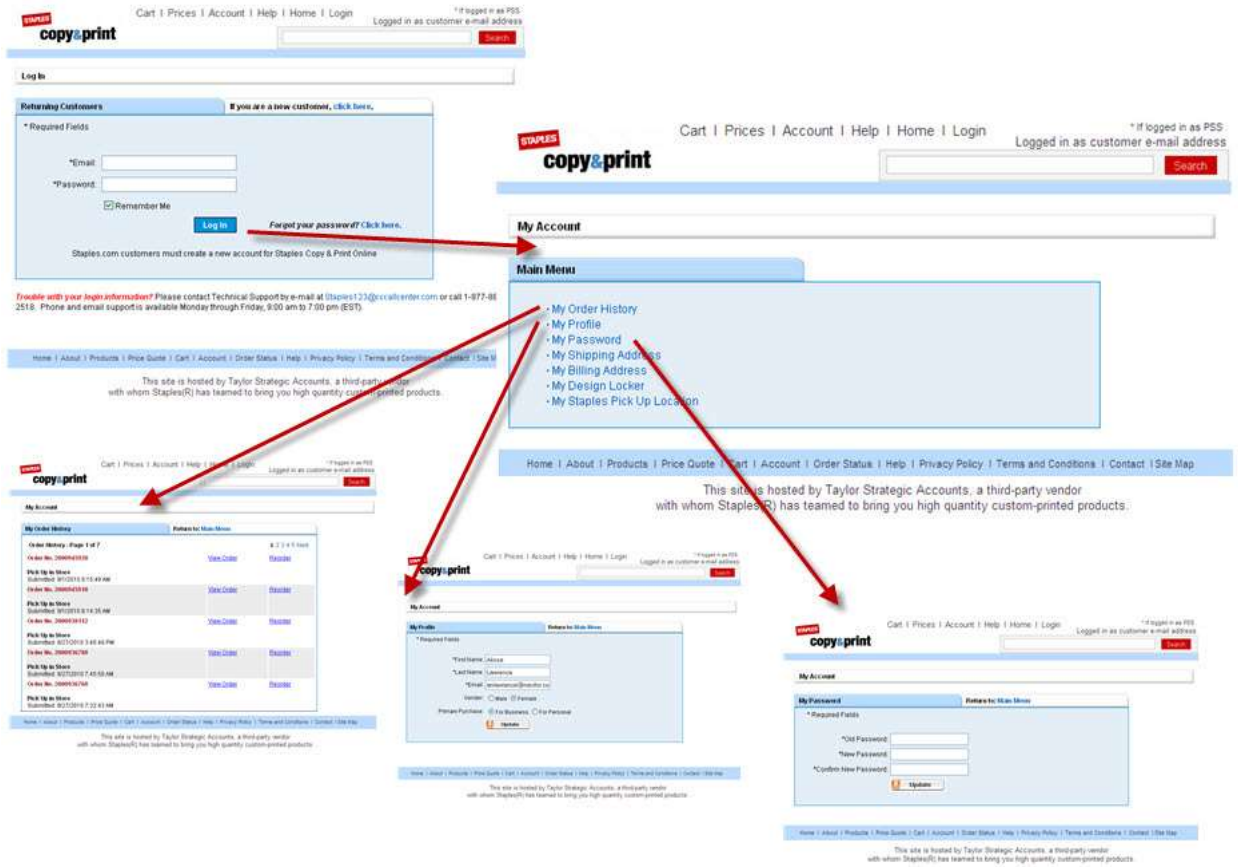
Notes

- There should be the ability to add bulleted informational text below each products grid if desired to call out things like “Back Copy available for \$30.00.” or list other product features.
- Since the price quote pages can get rather long with each product listed a link to the right will need to be available that will direct the user to the top of the page.
- This page will be available in dot-com & Retail. Note the product set pricing will be consistent between Retail & dot-com. However there will be some differences in product displayed on the Pricing pages between dot-com, Retail Full & Lite.

DRAFT

3.1.6. Account

The **Account** page allows the dot-com customer account to manage their orders and information. The function in the new application will be very similar to that of the current FCP dot-com function.



3.1.6.1. Account General

Use Case ID	Description
	All Account pages will have the new headers and footers present. ⁴
	Attempting to access the Account Page will present a login page if the user is not already logged into the site.
	The Account Page will present the Account Main Menu if already logged into the site.

⁴ Refer to Header (3.12) and Footer (3.14) sections.

Notes

- All accounts created in legacy FCP dot-com will need to port the customers email and login/password to work with the new system, so that are not required to recreate them. Past orders will not be available in the new system. Staples would like to provide a default message explaining the transition to returning customers with existing accounts that will lose their order history. This message is not required for PRD approval. Staples will provide content for this during the design/content phase.

3.1.6.2. Account Login Page

Cart | Prices | Account | Help | Home | Login

* If logged in as PSS
Logged in as customer e-mail address

Staples
copy & print

Log In

Returning Customers **If you are a new customer, click here.**

* Required Fields:

*Email:

*Password:

Remember Me

Log In

Forgot your password? Click here.

Staples.com customers must create a new account for Staples Copy & Print Online.

Trouble with your login information? Please contact Technical Support by e-mail at Staples133@ccsdlcenter.com or call 1-877-883-2518. Phone and email support is available Monday through Friday, 9:00 am to 7:00 pm (EST).

Home | About | Products | Price Quote | Cart | Account | Order Status | Help | Privacy Policy | Terms and Conditions | Contact | Site Map

This site is hosted by Taylor Strategic Accounts, a third-party vendor with whom Staples(R) has teamed to bring you high Quality custom-printed products.

Use Case ID	Description
	The Account Login page will have two tabs: one for returning customers (Returning Customers) and one for new customers that need to create an account (If you are a new customer, click here.).
	For returning customers, the customer enters their email and password. If the email and password don't match to an account an error message will display in red text above the Email field, "The information entered is not in our database. Please try again."
	The main Account page will display if the customer login is correct.
	If the customer selects the Remember Me check-box when logging in, the password will prefill the next time they return and enter their email address.
	The customer/user will click the Login button once they have entered their information.
	The customer/user can obtain their password through a link available in the text, "Forgot your password? Click here."

Use Case ID	Description
	The following message will display beneath the Login window, reading, “Trouble with your login information? Please contact Technical Support by email at Staples123@cccallecenterDot-com or call 1-877-883-2518. Phone and email support is available Monday through Friday, 9:00 am to 7:00 pm (EST).”
	Clicking on the email address in the message beneath the Login window will open an email message in the default email program with the To: and Subject: fields pre-populated.

Notes

- Since customers often become confused that they require a different password that what they may have already created on StaplesDot-com messaging is needed “StaplesDot-com customers must create a new account for Staples Copy & Print Online.”

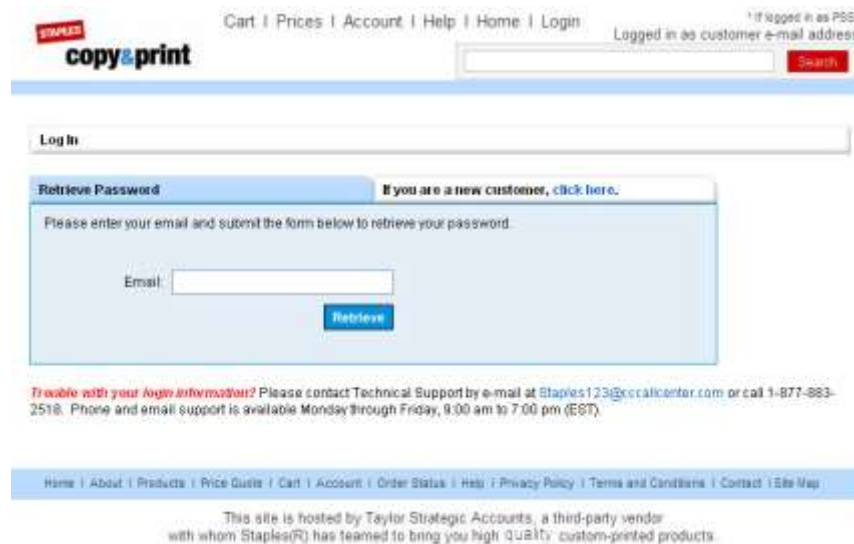
3.1.6.3. Account Log Out Page



Use Case ID	Description
	The Log Out page will have only one tab named Logged Out .
	When logged in the header will change to indicate “Logged in as email address” in the upper right hand corner.
	When logged in, the Login link in the horizontal header menu will change to Logout .
	Clicking the Logout link from the header menu will result in display of the Log Out page.
	The Log Out page will provide the message, “Thank you for shopping Staples Copy & Print Online. Goodbye.”
	A Log in again link will be beneath the thank you message. Clicking this link will return the user to the Login page.
	A Return to the Staples Copy & Print Online home page will be the last line of text within the tab. Clicking this link will return the user to the dot-com homepage.
	Text below Logged Out tab will read, “Trouble with your login information? Please contact Technical Support by email at Staples123@cccallecenter.com or call 1-877-883-2518. Phone and email support is available Monday through Friday, 9:00 a.m. to 7:00 p.m. (EST).”

Use Case ID	Description
	Clicking on the email address in the message beneath the Logged Out tab will open an email message in the default email program with the To: and Subject: fields pre-populated.

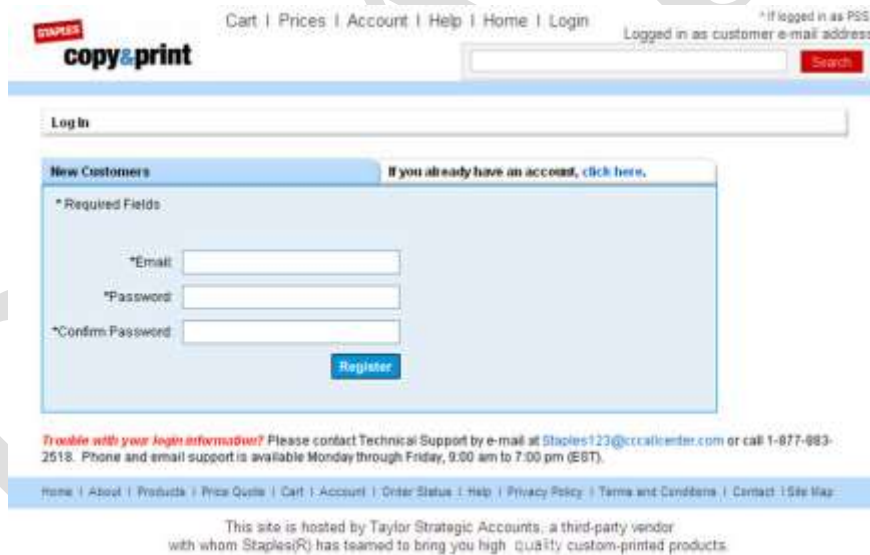
3.1.6.4. Account Password Retrieval



Use Case ID	Description
	The Retrieve Password page will have two tabs: one for returning customers who have misplaced or forgotten their password (Retrieve Password) and one for new customers that need to create an account (If you are a new customer, click here.).
	The tab will open with the message, "Please enter your email and submit the form below to retrieve your password."
	If the user/customer can't recall their password, they enter their email address in the Email field and click the Retrieve button. This will send the customer an email with a reset password.
	Below the Retrieve Password tab is the text "Trouble with your login information? Please contact Technical Support by email at Staples123@ccallcenter.com or call 1-877-883-2518. Phone and email support is available Monday through Friday, 9:00 a.m. to 7:00 p.m. (EST)."

Use Case ID	Description
	<p>The following will be sent in an email confirming account password retrieval:</p> <p>Dear Customer:</p> <p>Here is the password you have requested for Staples Copy & Print Online. Due to security concerns a new password has been generated for you. This newly generated password is below:</p> <p>3DST073N</p> <p>Once logged in we suggest that you change your password.</p> <p>It has been a pleasure to serve you. We look forward to seeing you again at Staples Copy & Print Online!</p> <p>If you did not request password retrieval, please contact Technical Support by email at Staples123@cccallscenterDot-com or call 1-877-883-2518.</p> <p>Phone and email support is available Monday through Friday, 9:00 am to 7:00 pm (EST). http://www.staplescustomprintingDot-com/.</p>
	Clicking on the email address in the password retrieval message will open an email message in the default email program with the To: and Subject: fields pre-populated.
	Clicking on the link in the password retrieval message will direct the user to the home page.

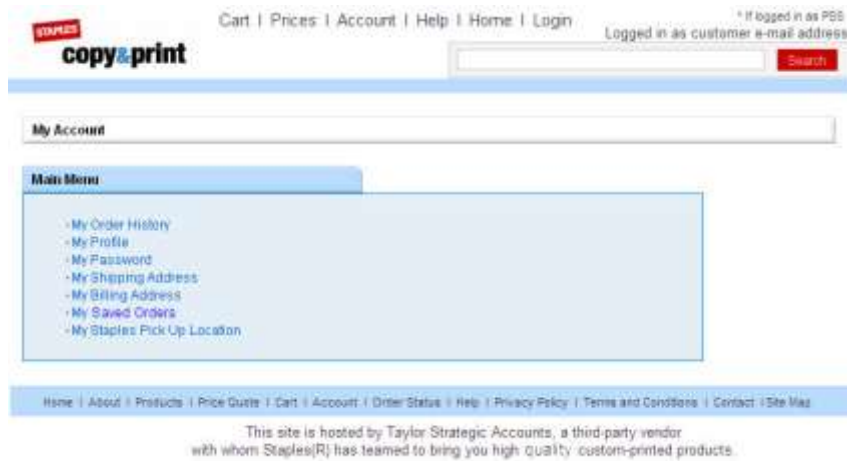
3.1.6.5. Account New Customer Tab



Use Case ID	Description
	<p>The New Customers page allows a user/customer to create an account.</p> <p>The New Customers page will have two tabs: one for returning customers who have misplaced or forgotten their password (New Customers) and one for new customers that already have an account (If you already have an account, click here.).</p>
	<p>The New Customers tab will provide for entry of the following required fields:</p> <ul style="list-style-type: none"> ▪ Email ▪ Password ▪ Confirm Password

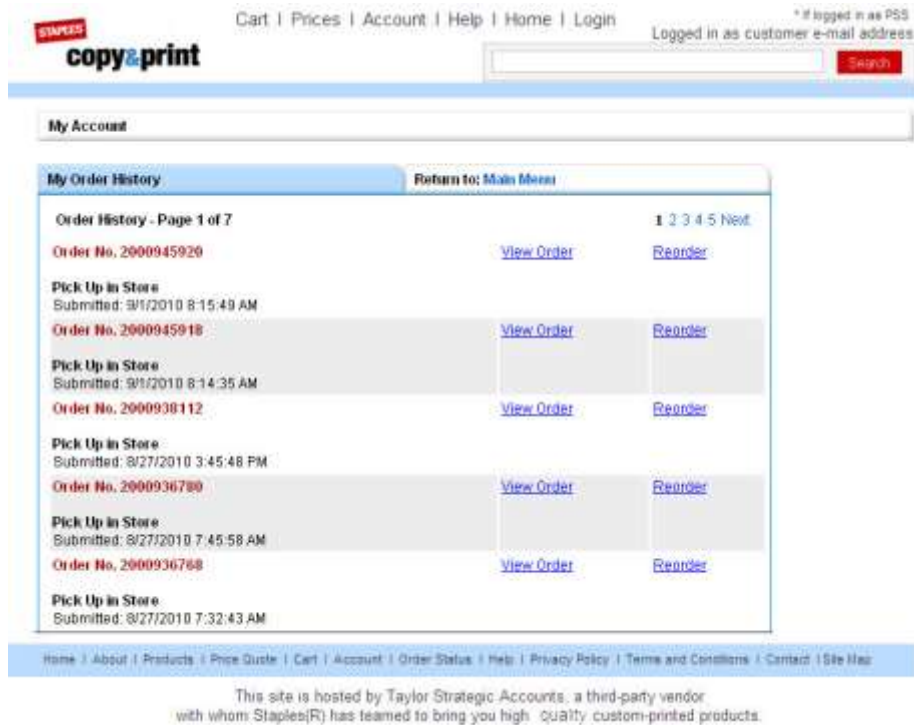
Use Case ID	Description
	If the information is new and the passwords match correctly a new account will be created and direct the user to the Account Main Menu.
	If the Password and Confirm Password fields don't match, an error will present in red text above the Email field indicating, "Passwords don't match, please try again."
	If the email is already in our database an error will present above the Email field that will indicate "Your email is already in our database. Please try a different email address or login. If you have forgotten your password, you can have a new one sent to your email address."
	The following message displays beneath the New Customers tab: "Trouble with your login information? Please contact Technical Support by email at Staples123@cccallscenterDot-com or call 1-877-883-2518. Phone and email support is available Monday through Friday, 9:00 am to 7:00 pm (EST). Clicking the email address will present an email window with the address pre-populated."
	<p>Once a customer is confirmed as a new customer successfully an email will be generated to them. Here is a sample of the email that would be generated:</p> <p>From: info@staplescustomprintingDot-com [mailto:info@staplescustomprintingDot-com] Sent: Friday, September 03, 2010 10:26 AM To: Lawrence, Steve M. (Curtis 1000) Subject: Staples Copy & Print Online Registration</p> <p>Dear Customer: Welcome to Staples Copy & Print Online. Your user name is: slawrence@curtis1000Dot-com</p> <p>If you ever forget your password, simply contact Technical Support by email at Staples123@cccallscenterDot-com or call 1-877-883-2518.</p> <p>Phone and email support is available Monday through Friday, 9:00 am to 7:00 pm (EST).</p> <p>To go to Staples Copy & Print Online now, go to the following link: http://www.staplescustomprintingDot-com/.</p>
	Clicking on the email address in the password retrieval message will open an email message in the default email program with the To: and Subject: fields pre-populated.
	Clicking on the link in the message will direct the user to the 2.0 FCP homepage.

3.1.6.6. My Account: Main Menu



Use Case ID	Description
	Once logged in the main menu will present with the following options:
	<p>My Order History Accessing this will present any orders placed with a matching email address to an account created from dot-com or Retail versions of the site. Note only new orders placed from the new application will display.</p>
	<p>My Profile Will present basic customer information.</p>
	<p>My Password Allows the user to reset their password.</p>
	<p>My Shipping Address Allows the user to set their preferred shipping address to make check out easier.</p>
	<p>My Billing Address Allows the user to set their preferred billing address to make check out easier.</p>
	<p>My Saved Orders Will allow the user the ability to save an order and recall it from their account for a specified period of time (7 days).</p>
	<p>My Staples Pick Up Location Allows the user to set their preferred retail store location to make check out easier if they have any instant items they are checking out.</p>

3.1.6.7. My Account: My Order History



Use Case ID	Description
	This page will display all orders placed to the account email address.
	There will be links allowing the customer will have the ability to page quickly through orders using Previous , Next , and directly through links to numbered pages for quick access to the current page in view.
	There will not be a Next link if the user/customer is on the last page of their order history. There will not be a Previous link if the user/customer is on the first page of their order history.
	In My Order History the site will display Order No. XXXXXXXXXXXX, it will classify if the order was Pick Up In Store, Delivery or both Pick Up In Store and Delivery along with when the order was submitted date and time in Eastern time.
	To the right of each order will be a link for View Order and a link for Reorder . Clicking these links will take the user/customer to the View Order and Reorder pages.

3.1.6.8. My Account: View Order

The screenshot displays the 'View Order' page for a Staples account. At the top, there are navigation links for Cart, Prices, Account, Help, Home, and Login, along with a search bar. The main content area is titled 'My Account' and 'View Order'. It shows the order number 2980530762 and provides a 'Printable Receipt' link. The order details include the store name (Staples Store # 5999), address (99 Staples Drive, Framingham, MA 02144), phone number (508-555-1234), and store hours. Customer information for Alissa Lawrence is also shown. The order items are categorized into 'Pick Up in Store' and 'Delivery'. The 'Pick Up in Store' section lists 'Full Color Business Cards' (100 units, \$22.49) and 'Premium Black' (\$7.50). The 'Delivery' section lists 'Full Color Business Cards' (100 units, \$15.99) and 'Medium Weight Black' (INCLUDED). The final total is \$36.50, including shipping and processing fees and tax.

Use Case ID	Description
	The My Account > View Order page will have two tabs: The View Order tab (default) for viewing the details of the order that was clicked on in the previous page (My Order History) and the Return to: My Order History, Main Menu tab.
	The order number will display at the top left in red text. A Printable Receipt link displays at the top right. Clicking the Printable Receipt link will present the order information in new window and bring up the Print window.
	Pick-up in store items will be displayed before other orders beneath the heading Pick Up In Store . Customer Info will be presented to the right of the store information.
	A subtotal will be displayed with a price indicating Subtotal to be Paid in Store .
	Delivery items they will be displayed next (after Pick-Up In Store) under the heading Delivery . For delivery items, the shipping address will display to the left of the billing address or customer information. Customers can ship to their own address or to the retail store address.
	Subtotal will be displayed at the end of the delivery items and indicate either Subtotal Paid Online (if an online sale) or Paid In Store (if generated in retail location). Shipping and Processing Fees, Tax (if applicable), Discounts (if applicable), and Total Paid Online will also be listed.

Use Case ID	Description
	The View Order page will provide a thumbnail for all items ordered. A link to an Actual Size PDF of the item will also be available, if applicable.
	Product descriptions and cart Item ID numbers will display to the right of the thumbnail.
	The quantity ordered, item SKU(s), and subtotal (price) will display to the right of the product descriptions and cart Item ID numbers. For delivery items the production days will also be listed. Any specific order details will be listed below (e.g. stocks, etc.).

Notes

- If the billing was bypassed by using the PSS order entry, the **Billing Address** field will be blank and will display “**PSS Entry Bypass**” with the zip code used.

3.1.6.9. Account Reorder

The screenshot displays the 'My Account > Reorder' page on the Staples website. At the top, there is a navigation bar with links for 'Cart', 'Prices', 'Account', 'Help', 'Home', and 'Login'. A search bar is also present. Below the navigation, the 'My Account' section is visible, followed by the 'Reorder' tab. The main content area shows a table of items to be reordered, with columns for 'Pick Up in Store Products' and 'Quantity'. The items listed are:

- Return Address Labels (Order Item ID: 1000999613) - Quantity: 300. This product is not available for reorder online. Please visit your local Store. For further assistance, please call a Staples Custom Product Specialist at 1-888-333-3199. Specialists are available Monday through Friday, 9:00 am to 7:00 pm (EST).
- Full Color Business Cards (Order Item ID: 1000999614) - Quantity: 200.
- Full Color Business Cards (Order Item ID: 1000999615) - Quantity: 200.
- Full Color Vertical Business Cards (Order Item ID: 1000999616) - Quantity: 200. This product is not available for reorder online. Please visit your local Store. For further assistance, please call a Staples Custom Product Specialist at 1-888-333-3199. Specialists are available Monday through Friday, 9:00 am to 7:00 pm (EST).

Each item has a thumbnail, a description, an 'Actual Size PDF' link, and a quantity. A 'Reorder' button is located at the bottom right of the table. The footer of the page includes a disclaimer: 'This site is hosted by Taylor Strategic Accounts, a third-party vendor with whom Staples(R) has teamed to bring you high quality custom-printed products.'

Use Case ID	Description
	The My Account > Reorder page will have two tabs: The Reorder tab (default) for viewing the details of the order that was clicked on in the previous page (My Order History) and the Return to: My Order History, Main Menu tab.
	The Reorder page will provide a thumbnail for all items ordered.
	Product descriptions and order item IDs will display in the column to the right of the thumbnail.

Use Case ID	Description
	Quantity ordered will display in the right column.
	Production days will be listed for delivery-only items. If the item is available for reorder a box to check to reorder will be displayed to the right with an Actual Size PDF link below to preview the item.
	A Reorder button will be displayed at the bottom right of the order history list. Clicking the Reorder button will add the selected items to the cart. If the user clicks the Reorder button prior to any items being selected, an error will present that reads, "Please select items for reorder."
	The following message will display for Div. 2 In Store only items: "This product is not available for reorder online. Please visit your local Store where this item was ordered." ⁵
	The following message displays if the design or product is unavailable: "This product is no longer available for reorder. Please visit your local store or call a Staples Custom Product Specialist at 1-888-333-3199. Specialists are available Monday through Friday, 9:00 a.m. to 7:00 p.m. (EST)." ⁶

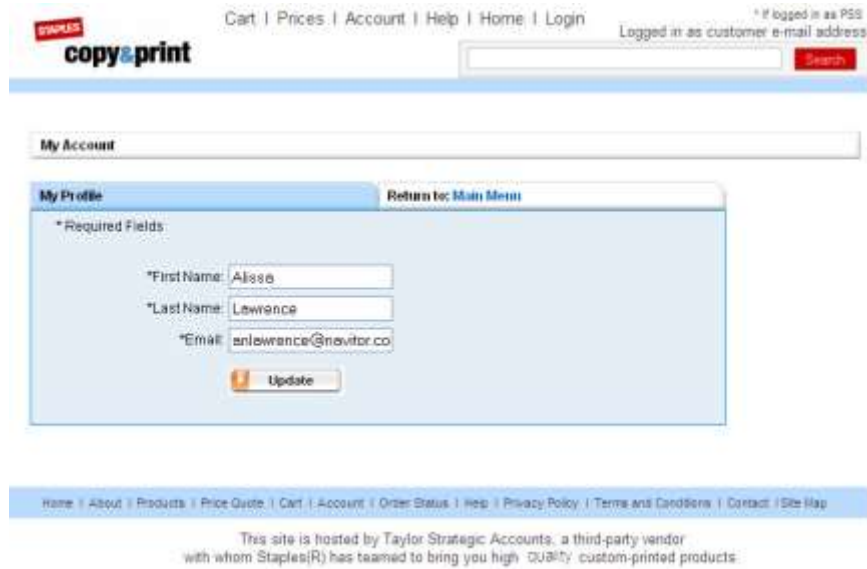
Notes

- When viewing order history, if a design or item is not available in the current view, text will notify the user of the inability to order these items with the following text:
- If pricing updates are made, the history will still display the original order price, but if the item is reordered when the items populate the cart they will reflect the updated current pricing for options selected.
- If an item is reordered from the dot-com account login, the items will be added to the cart and follow the customer payment flow.

⁵ Need to confirm the correct message.

⁶ Need to confirm the correct message.

3.1.6.10. Account My Profile



Use Case ID	Description
	The fields on the My Profile tab will be blank unless the customer has provided information.
	To the right of My Profile tab will be a tab named Return to: Main Menu . The text Main Menu will be linked to the Account Main Menu page.
	The My Profile tab will provide for entry of the following required fields: <ul style="list-style-type: none"> ▪ First Name ▪ Last Name ▪ Email
	The My Profile tab will include an Update button.
	If the customer clicks the Update button without providing information in all of the required fields an error message will display above First Name field that reads, "Please correct the information below." The field that was left blank will have "Required" indicated by the field.
	The site will populate the fields with the new information if the customer edits and clicks the Update button.

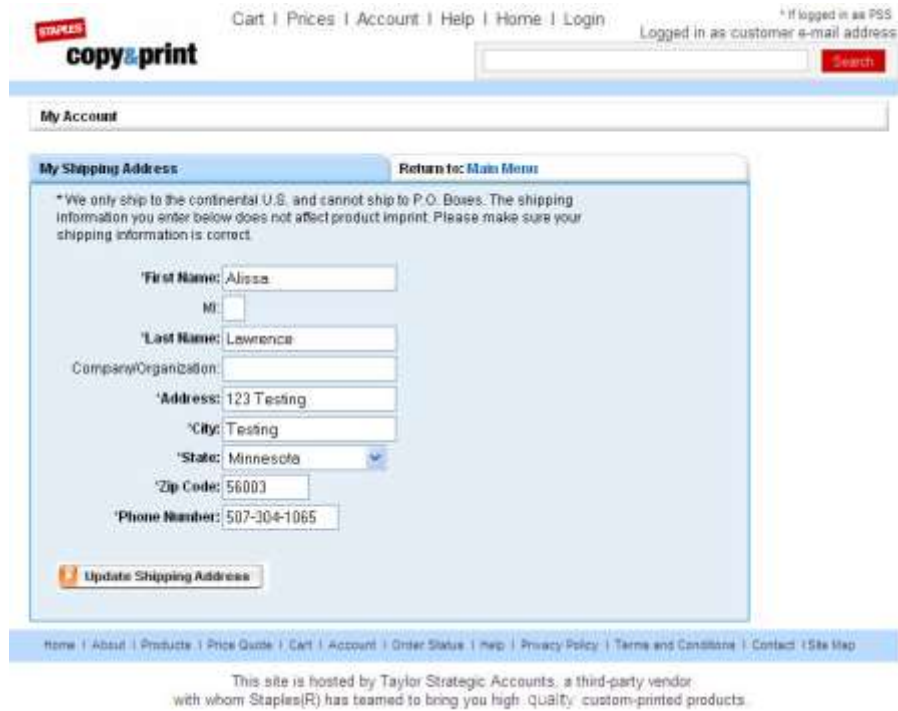
3.1.6.11. Account My Password

Use Case ID	Description
	Upon initial display, the fields will be blank.
	To the right of My Password tab will be a tab named Return to: Main Menu . The text Main Menu will be linked to the Account Main Menu page.
	The My Password tab will provide for entry of the following required fields: <ul style="list-style-type: none"> ▪ Old Password ▪ New Password ▪ Confirm New Password
	The My Password tab will include an Update button. Clicking the Update button after completing entry in the fields above will change the password.
	If the customer enters new password that doesn't match, an error message will display above the Old Password Field that reads, "Make sure the new passwords match." This is the same message that will display if the user enters their old password, but fails to complete entry in the New Password and/or Confirm New Password fields.
	If the customer enters their old password incorrectly an error will present above the Old Password Field indicating "Your password is incorrect. Please try again."
	If the customer doesn't enter their old password an error will present above the Old Password Field indicating, "Please enter your current password."

Notes

- Currently the only password requirements are that the password must be 6 characters in length (12/1/2010).

3.1.6.12. Account My Shipping Address



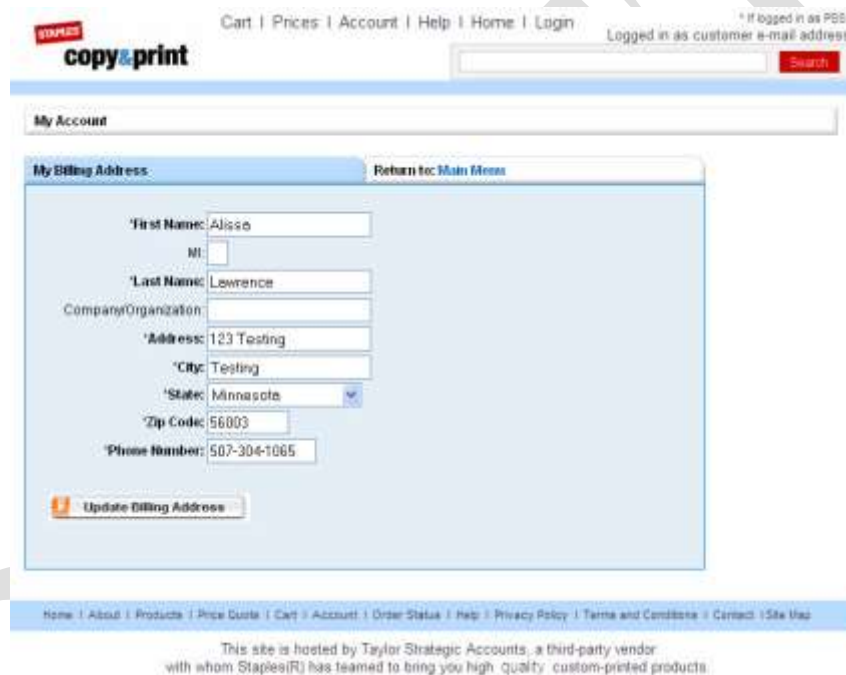
Use Case ID	Description
	To the right of My Shipping Address tab will be a tab named Return to: Main Menu . The text Main Menu will be linked to the Account Main Menu page.
	The following message displays at the top of the tab prior to the text fields: “* We only ship to the continental U.S. and cannot ship to P.O. Boxes. The shipping information you enter below does not affect product imprint. Please make sure your shipping information is correct.”
	The My Shipping Address tab will provide for entry of the following fields: <ul style="list-style-type: none"> ▪ *First Name: ▪ MI: ▪ *Last Name: ▪ Company/Organization: ▪ *Address: ▪ *City: ▪ *State: with a drop down box that eliminates Hawaii and Alaska ▪ *Zip Code: ▪ *Phone Number Required fields are noted with an asterisk.
	The My Shipping Address tab will include an Update Shipping Address button. Clicking the Update Shipping Address button after completing entry in the fields above will change the shipping address.

Use Case ID	Description
	<p>If the customer clicks the Update Shipping Address button without providing information in all of the required fields an error message will display above First Name field that reads, "Please correct the information below."</p> <p>The field that was left blank will have "Required" indicated by the field.</p>

Notes

- Customer shipping information will automatically fill the Shipping Information Page if a customer has saved their shipping information and is logged in when placing a new order at the check-out.

3.1.6.13. Account My Billing Address



Staples copy&print

Cart | Prices | Account | Help | Home | Login

Logged in as customer e-mail address

My Account

My Billing Address

Return to: Main Menu

*First Name: Alisse

MI:

*Last Name: Lawrence

Company/Organization:

*Address: 123 Testing

*City: Testing

*State: Minnesota

*Zip Code: 56003

*Phone Number: 507-304-1085

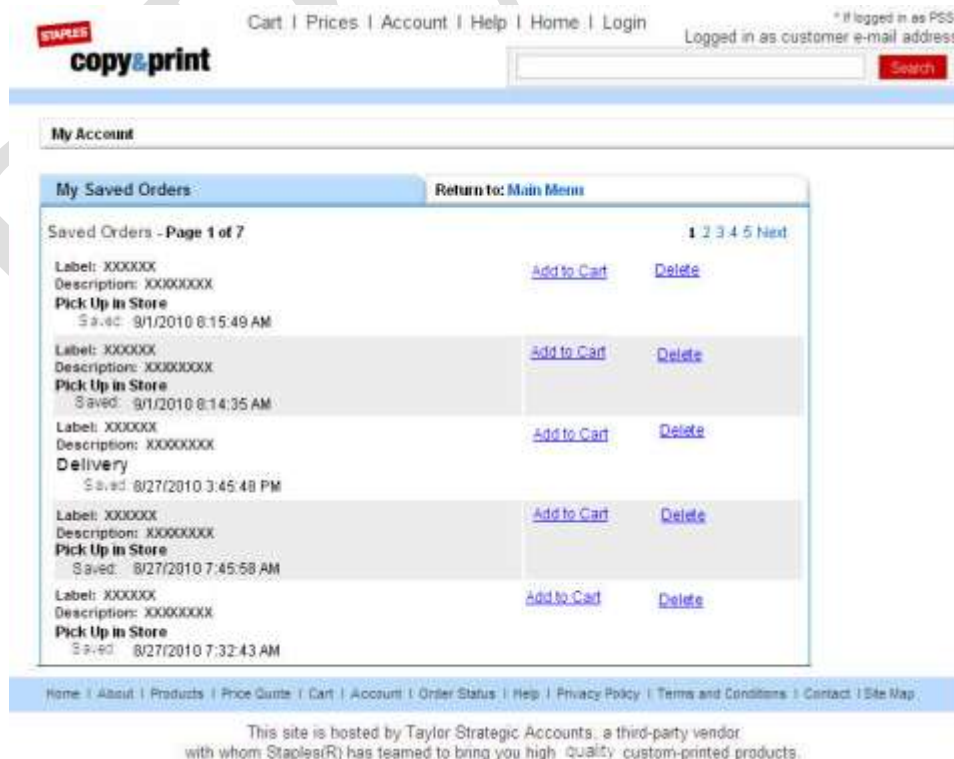
Update Billing Address

Home | About | Products | Price Quote | Cart | Account | Order Status | Help | Privacy Policy | Terms and Conditions | Contact | Site Map

This site is hosted by Taylor Strategic Accounts, a third-party vendor with whom Staples(R) has teamed to bring you high quality custom-printed products.

Use Case ID	Description
	To the right of My Billing Address tab will be a tab named Return to: Main Menu . The text Main Menu will be linked to the Account Main Menu page.
	The My Billing Address tab will provide for entry of the following fields: <ul style="list-style-type: none"> ▪ *First Name: ▪ MI: ▪ *Last Name: ▪ Company/Organization: ▪ *Address: ▪ *City: ▪ *State: with a drop down box ▪ *Zip Code: ▪ *Phone Number Required fields are noted with an asterisk.
	The My Shipping Address tab will include an Update Shipping Address button. Clicking the Update Shipping Address button after completing entry in the fields above will change the shipping address.
	If the customer clicks the Update Shipping Address button without providing information in all of the required fields an error message will display above First Name field that reads, "Please correct the information below." The field that was left blank will have "Required" indicated by the field.

3.1.6.14. Account My Saved Orders

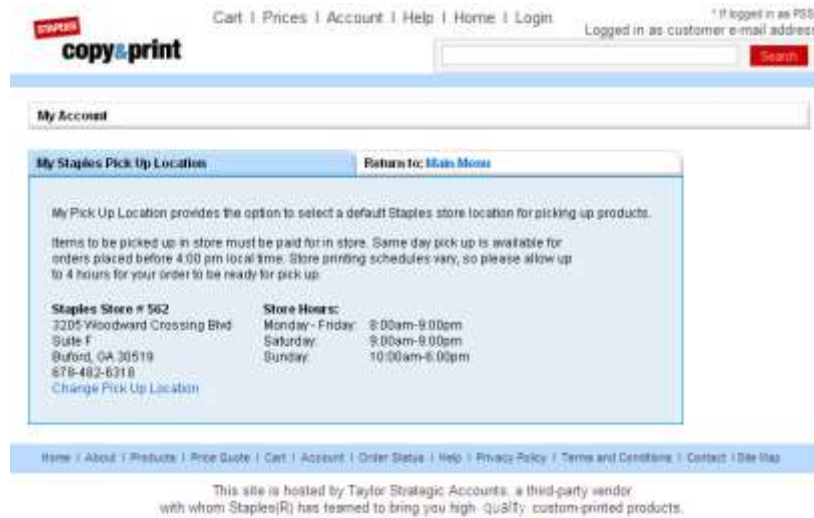



Use Case ID	Description
	The My Saved Orders page displays orders for 7 days following the time of creation. A customer must be logged in to their account when creating an order for it to be displayed on the My Saved Orders page.
	The My Saved Orders tab will be extended to multiple pages so as to keep track of and display orders for a customer who has saved more than XYZ.
	Each saved order will include the label and description the customer assigned to the order.
	Each saved order will identify if the order is: <ul style="list-style-type: none"> ▪ Pick Up In Store ▪ Delivery ▪ Pick Up In Store and Delivery
	Each saved order will indicate the time and date the order was saved.
	Each saved order will provide a link to the right to add the saved items to the cart. If this button is clicked the items saved will go into the cart and allow checkout to occur.
	Once items are in the cart, the customer has the option to go and edit design or options for items with these options available.
	Each saved order will also provide the option to delete so that the customer can return and delete the order.
	If the customer selects Delete , the confirmation message displays that reads, "Do you want to proceed with deleting this order?"
	If the customer clicks Yes to this confirmation message, the order will be deleted and the list of saved orders will redisplay with the order removed.
	If the customer clicks No , the order will not be deleted and the customer will return to the list of saved orders.

Notes

- Further information and functionality about saving an order for Retail and PSS with an admin ID will be outlined in the Save Order Section.

3.1.6.15. Account My Staples Pick Up Location



Use Case ID	Description
	If the customer has already selected their preferred pick-up location, the My Staples Pick Up Location page will display the store number and information provided in the daily Staples XML feed.
	Should a customer have a store selected and that store is closed, is flagged that there is no CPC, or is flagged that the store is closing, the My Staples Pick Up Location page would no longer have store information and the customer would be notified to select a new pick-up location.
	<p>The customer clicks on the Change Pick Up Location if they have not selected a preferred location or would like to change their preferred location. Clicking the Change Pick Up Location will direct the customer to the Find Store Locations page.</p> 
	The customer can search for their desired store on the Find Store Locations page by entering information Address (City and State required), Zip Code, or Store Number in the fields of the Locate a US Store section.

Use Case ID	Description
	In the Find stores within section, the customer can specify a maximum Distance (in miles) between the target store and the address specified in their account profile.
	After they have entered information and clicked the Go button, they will be directed to a search results page. This page will display all stores that fit the search criteria. From the search results, the user/customer can select a store as their preferred location, view store information,, or get driving directions to the stores displayed.
	Selecting the store will bring the user back to the My Staples Location page and fill in the tab with information from the selected store.

Notes

- The user can also search for a store by clicking on a map that will identify the locations nearest to them.
- If the user/customer saves the preferred location while being logged in to their account, then the location will be recalled and preselected for them when they return to the site and log in.
- There is the issue of a store that may be closing, so Staples may remove this store from the XML feed, but it may still be available in the store locator. If a user selects a store that is not in the store locator an error will present requesting the customer select a new location as this store may not be available to fulfill the order. Content of this error message will need to be written during design/content phase, which is not required for PRD approval.

3.1.7. Help, Privacy, and Other Pages

Use Case ID	Description
	The Help page will need to be reviewed for changes. Content is not required for PRD sign off and information will be ported over to a separate document for review.
	The links at the top for the questions will take the user to the specific answer rather than having to scroll and read to find the answer to their question. ⁷
	Any emails if clicked will open an email window with the To: field pre-populated.
	The Password Retrieval will link the user to this page on the site.
	The Pricing Tab link will take the user to the Price/Price Quote page to look up product pricing. Standard shipping is included, expedited is additional charge and is calculated in the cart.

⁷ Need definition/explanation of what is meant by this statement.

Use Case ID	Description
	<p>Linking to the 100% Satisfaction page will take the user to a page that includes the following message:</p> <p>“Staples stands behind the quality of its products. If you are not completely satisfied with the quality of the products, please contact a Staples Custom Product Specialist or Staples Store within 30 days of receipt of your order for a FULL exchange, credit or refund. Specialists are available Monday through Friday, 9:00 a.m. to 7:00 p.m. (EST). Please note that Staples cannot be responsible for design errors, spelling or image selections that are a result of the design process.”</p>
	<p>The Staples Privacy Policy link will take you to that page on the StaplesDot-com website.</p>
	<p>The Help page and 100% Satisfaction page will have the site header and footer along with the left navigation.</p>

3.1.8. Login/Logout

- If the customer isn't logged into their account they can click on the Login link in the header and will be directed to the **Account Login** page to login and continue with the same navigation and functionality outlined in the Account Section.
- If the customer has logged in already, the link in the header will change from **Login** to **Logout**. If **Logout** is clicked the customer will be logged out of their account, and presented with the logout page. Once logged out the **Logout** link in the header will return to **Login**.

3.1.9. About

- The **About** page will need to be reviewed for changes during the design/content phase. Content is not required for PRD sign off and information will be ported over to a separate document for review.
- Any emails if clicked will open an email window with the address pre-populated.
- Password Retrieval will link the user to this page on the site.
- The **About** page will have the site header and footer along with the left navigation.

3.1.10. Products

- The Notes page is exactly like the **Site Map** page, displaying all products and allows the user the ability to link to the first possible page to order a product.
- The **Products** page is necessary and will be updated to reflect the specific products loaded to the application per view, based on the new product assortment. Content is not required for PRD sign off. (TBD during design/content phase).

3.1.11. Order Status

- If the customer is logged into their account this will take the user to their order history page. If their orders have shipped and the shipping confirmation has been updated on the site the

order will be updated with a Track Link. Clicking this link will direct the user to the UPS website to track the delivery of their order.

- If the user is not logged in already it will direct them to login to their account where they can track their order.

3.1.12. Privacy Policy

- The **Privacy Policy** page will need to be reviewed for changes during the design/content phase. Content is not required for PRD sign off and information will be ported over to a separate document for review.
- The **Specific Questions** page will have a link to help the user find the specific information they are looking for rather than having to read everything and scroll through the whole page.
- The **Privacy Policy** page will have the site header and footer along with the left navigation.

3.1.13. Terms and Conditions

- The **Terms and Conditions** page will need to be reviewed for changes during the design/content phase. Content is not required for PRD sign off and information will be ported over to a separate document for review.
- Any emails if clicked will open an email window with the **To** field prepopulated.
- Password retrieval will link the user to this page on the site.
- The **Privacy Policy** page will link you to the **Privacy Policy** page on the FCP application.
- The **Terms and Conditions** page will have the site header and footer along with the left navigation.

3.1.14. Contact

- The **Contact** page will need to be reviewed for changes during the design/content phase. Content is not required for PRD sign off and information will be ported over to a separate document for review.
- Any emails if clicked will open an email window with the address pre-populated.
- Password retrieval will link the user to this page on the site.
- The **Contact Us** page will have the site header and footer along with the left navigation.

3.1.15. Site Map

- This page was added for SEO – It links the customer to any page on the site or the 1st possible page to configure all products on the website. This page will be kept and will be part of the of the design/content phase which is not required for PRD approval.

3.2. DOT-COM PRODUCT NAVIGATION

- All product navigation categories, subcategories, and product breakdown will be completed during the design phase with input from Staples & Taylor, this work is not dependent on PRD approval.

4. NAVIGATION/SITE FLOW RETAIL: LITE/FULL

4.1. HOMEPAGE

4.1.1. General Layout

Use Case ID	Description
	Stores will access the retail version of the site through a secure login page that requires entry of the store number and password.
	Enter the 4-digit store number in the Store Number field. Enter "Staples" in the Password field.
	Stores will only have to store number and password the first time they access the retail version of the site. A cookie will be set upon first login that will recognize all subsequent order activity as belonging to the store account.
	The site will be capable of presenting Flash animations.
	The site will be capable of presenting Flash video.
	The masthead of the right navigation frame will display SEO Copy.
	A banner featuring promotions will display immediately below the SEO Copy in the right navigation frame.
	The most popular product categories will display immediately below the promotions banner in the right navigation frame.
	The site Home page will account/provide for all possible product categories.
	The Lite and Full versions of the site will display the same Home page.

Notes

- The Lite and Full versions of the site will have some product differences as some products are not available in Lite. There will be slightly different URL's for Lite and Full. It will be Staples responsibility to give the stores the proper URL's to display the correct version.
- The site Home page will reflect the look and feel of the Copy & Print Micro Site more than has previously been the case.
- Staples didn't provide a style guide, so Taylor is assuming that the fonts, colors, etc. currently used on the Retail version of the application will be acceptable for the redesign.
- Not all in-store products will be shown on the dot-com site.

4.1.2. Header

Use Case ID	Description
	The header will be presented on every page in the process of the order.
	If a PSS rep is accessing the site, a star will appear in the upper right-hand corner of the site to let them know that they are engaged and can by-pass some of the payment information that will be outlined in payment section.
	If an end-user customer has accessed the site and logged in to their account, a message will display in the upper right corner of the Home page that reads, "Logged in as xxxxxxx@xxxxDot-com "
	If the Cart link is clicked, the user will be directed to their cart. The cart will display anything they have added or will display an empty cart if nothing has been added.
	If the Prices link is clicked, the user will be directed to a page that will organize the product offering and allow the user the ability to look at product pricing.
	If the Control Panel link is clicked and the user is accessing from the MPS device, then a login page will display requesting store number and password. The Control Panel page will display after login to access order history. A cookie will be set so that if accessing through the MPS device the login will be recalled and not necessary again.
	If the Control Panel link is clicked and the user/customer is accessing from the RIK device, then a login page will display requesting store number and password. The Control Panel page will display after login to access order history. This login page will display EVERY TIME that the user attempts access from the RIK device.
	If the Home link is clicked, the user will be directed to the Home page.
	There will be a link or linked graphic to return the user to StaplesDot-com.

Notes

- For the **Prices** link, this will be the same as dot-com 8.1.1, only will display some additional products for Retail Full Stores and hide a few items that appeared in the dot-com view.

4.1.3. Categories

Use Case ID	Description
	Clicking on a category will direct the user to a sub-category page that features additional product details (This will serve primarily an information/research purpose, helping the user determine which product best suits their needs.).
	A mouseover submenu will display when the cursor is held over a category link/button.
	The mouseover submenu will allow the customer to drill further into the category. Example: Hovering over Business Cards link in the left navigation (or the Business Cards icon) will display a window that contains the business card subcategories (This allows the user to skip some clicks and go further into their desired product.).

Notes

- Need to determine how the products will be broken down w/ the final list of products that will go live for the 1st release. (Joint decision Staples & Taylor). This will be completed during the design/content phase and is not required for PRD approval.
- The left navigation bar will reflect the categories: we still need to determine how the products will be broken down w/ the final list of products that will go live for the 1st release. (Joint decision Staples & Taylor). This will be completed during the design/content phase and is not required for PRD approval.
- Each categories flyover links will need to be outlined here and will direct the user further into the order process. This will be determined during the design/content phase and is not required for PRD approval.

4.1.4. Footer

Use Case ID	Description
	The footer will be presented on every page in the process of the order.
	The absolute bottom of all footers will include the statement: "This site is hosted by Taylor Strategic Accounts, a third-party vendor with whom Staples® has teamed to bring you high quality custom-printed products.
	Scrolling over a category will engage a flyover that will allow the customer to drill further into the category. Example: Hovering over Business Cards in the left navigation will present a window that will have the Business Card subcategories allowing the user to skip some clicks and go further into their desired product.
	If the Home link is clicked, the user will be directed to the Home page.
	If the Price Quote link is clicked, the user will be directed to a page that will organize the product offering and allow the user the ability to look at product pricing.
	If the Control Panel link is clicked and the user is accessing from the MPS device, then a login page will display requesting store number and password. The Control Panel page will display after login to access order history. A cookie will be set so that if accessing through the MPS device the login will be recalled and not necessary again.
	If the Control Panel link is clicked and the user/customer is accessing from the RIK device, then a login page will display requesting store number and password. The Control Panel page will display after login to access order history. This login page will display EVERY TIME that the user attempts access from the RIK device.
	If the Cart link is clicked, the user will be taken to their cart. The cart will display anything they have added or will display an empty cart if nothing has been added.
	If the Privacy Policy link is clicked, a new window will open with the following URL hosted on the on the StaplesDot-com website: http://www.staplesDot-com/sbd/content/help/policies/privacy.html .
	If the Terms and Conditions link is clicked, the user will be directed to a page that will explain the terms and conditions.

Notes

- Each category mouseover link will need to be outlined here and will direct the user further into the order process. This will be determined during the design/content phase and is not required for PRD approval.
- There will be an area for marketing. To put up banner promotions or informational marketing messages. Would be a nice to have this rotate if marketing desires to have multiple offers or messages at one time. This could be changed quickly and easily and would have the ability to link to special landing pages or other points in the application. These may need to differ between retail & dot-com.⁸
- Privacy Policy – if clicked will take the user to a page that will explain the privacy policy, see 8.1.8,⁹ this page will be the same for dot-com & retail.
- Terms and Conditions – if clicked will take the user to a page that will explain the terms and conditions see 8.1.9.¹⁰ This page will be the same for dot-com & retail.
- There will be a button for chat below the Search in the header. When an MCC Associate is available to chat, the button will appear. If there are no associates available or there are enough chats occurring where associates aren't available to engage, the chat button will disappear.

4.2. RETAIL PRODUCT NAVIGATION

- All product navigation categories, subcategories and product breakdown will be completed during the design phase with input from Staples & Taylor, this work is not dependent on PRD approval.

5. PRODUCT STUDIO

5.1. DRAG & DROP STUDIO (PRINT ITEM STUDIO)

This is all the functionality that we would like for the main Business Card Studio. Many of these features will be the same for other studios.

- 1) Tool Bar
 - a) Font Selection
 - b) Font Size Selection
 - c) Color (same for font and stock logo)
 - d) Bold
 - e) Italicize
 - f) Underline
 - g) Alignment
-

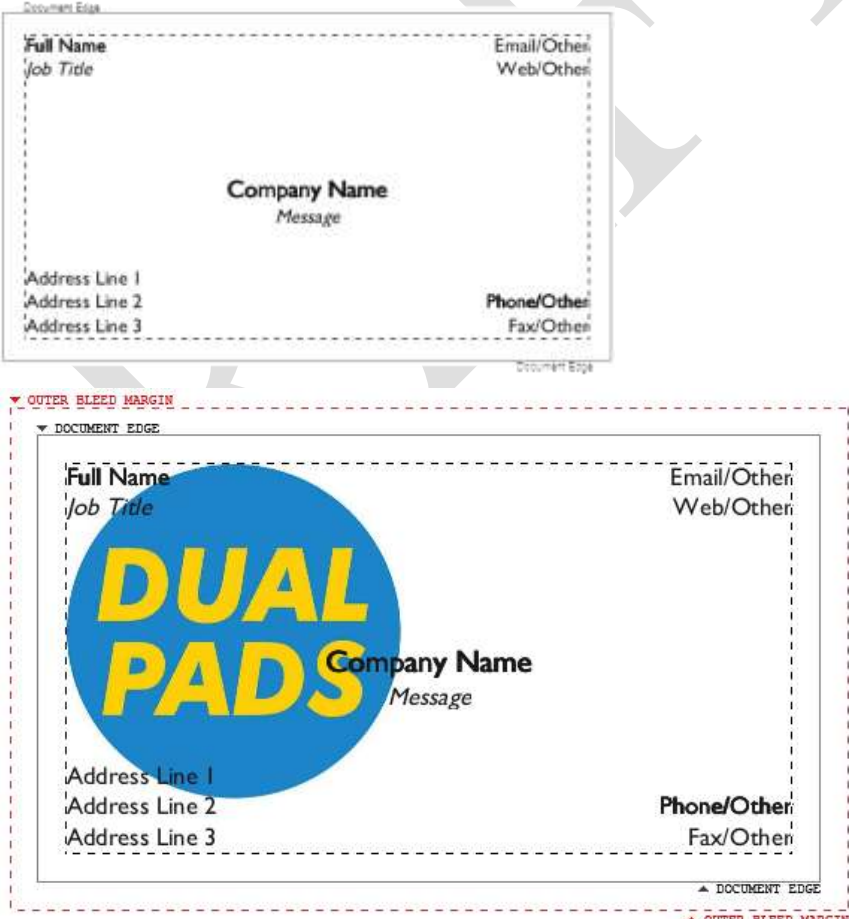
⁸ Not sure what to do with this statement. It seems to have been addressed in earlier statements about Flash animation in the header.

⁹ Confirm

¹⁰ Confirm

- h) Insert Stock Logo
- i) Delete
- j) Upload Image (per file criteria per as documented on upload page – Jpeg, Tiff, Gif, PNG, BMP)
 - i) While uploading should now see the upload status bar.
 - ii) Test that an image less than 300 DPI presents message that the image is of questionable quality.
 - iii) Test transparent PNG file is transparent when uploaded in the studio.
- k) Add Text (custom text)
- l) Spell Check
- m) Zoom In
- n) Zoom Out
- 2) View Locker
- 3) Save to Locker
 - a) rotate text
 - b) Appear Symbols
 - c) Lines & Shapes
 - d) Grid
 - e) Learn How (must match functionality as stated)

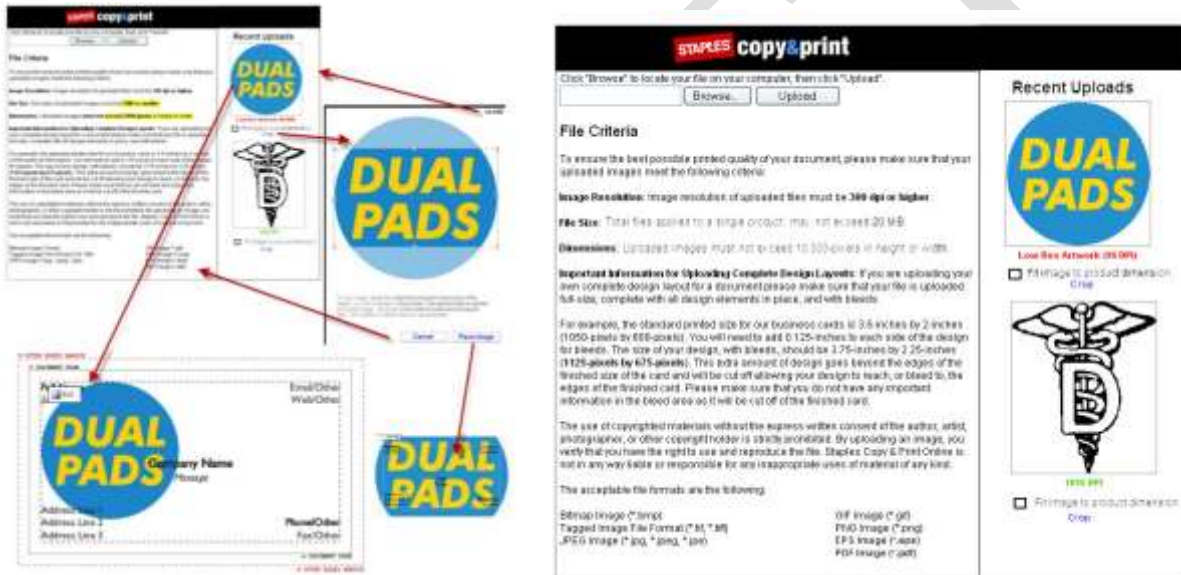
Use Case ID	Description
	Every product will have text entry fields to the left upon entering the studio. The appropriate number of lines per product/design will appear and have a position on the product configuration area.
	The studio will need to have an Add Text button. This will add an additional text entry field to the left below the other lines. The line will be added to the product inside the imprint area. Any added lines will function like all other lines.
	If the user clicks on a line or selects a line by clicking on a text entry field, the text entry field will become shaded with a different color to indicate that line has been engaged. This is also true if the user has engaged multiple lines.
	To show that a line is engaged on the product a dashed moving text box will appear around the copy or the default text to show the lines are engaged.
	If a text box has been engaged, but no copy entered and the user selects something else the default text will disappear on the product design area. The line is still available for entry, just won't show the default text.
	If the user previews and chooses to come back and edit any lines that didn't contain copy, the default text shouldn't appear. The line will still be available for entry, just won't show the default text.
	If the text line starts in the middle of the document and the user types copy past the edge of the right or left imprint area, rather than showing an error or allowing the text go off the product, the text should start to expand to the left or right until it reaches the complete imprint area.
	If the line is left or right justified in the imprint area it would allow the user to type until the complete width of the imprint area is filled.
	Once a line hits the maximum length of the imprint area, the studio will display a message that the "Line X - text is too long. This message will display as long as the line is selected, if the user selects another line or logo the message will disappear.

Use Case ID	Description
	<p>The user may select and engages multiple lines of text. This can be done by clicking on any desired lines while the Control Key is depressed. Then any changes to font, color, pt size, bold, italic, underscore or justification apply to all lines.</p>
	<p>Multiple Lines can be dragged and dropped as a group. If the user attempts to drag copy outside of the imprint area, the copy will snap back closest to where the customer dragged their copy off, but keeping it inside the imprint area. Note: When multiple lines snap back, they need to keep their line relation and justification to each other.</p>
	<p>To disengage multi line select you simply have to click on other text or image elements or elsewhere else on the product.</p>
	<p>The studio will load a design area for each product/design. This area is where the user will design and preview text entry, upload images & stock logos, if desired. Per the product specs the area will be representative of the products size and ratio. Upon entering the studio for a print item the user will be shown a Document Edge/Cut Line and an Interior Text Imprint area line. If the customer chooses to upload or apply an image, the studio will add an Outer Bleed Margin, in order to ensure that art will bleed off the edge of the product the customer/associate must extend their artwork to the full bleed area.</p>  <p>Outer Bleed Margin and Document Edge lines will be labeled, but won't appear on the printed products.</p>

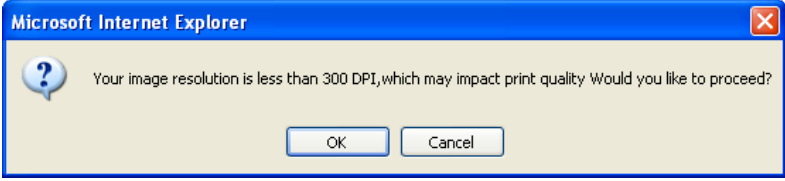
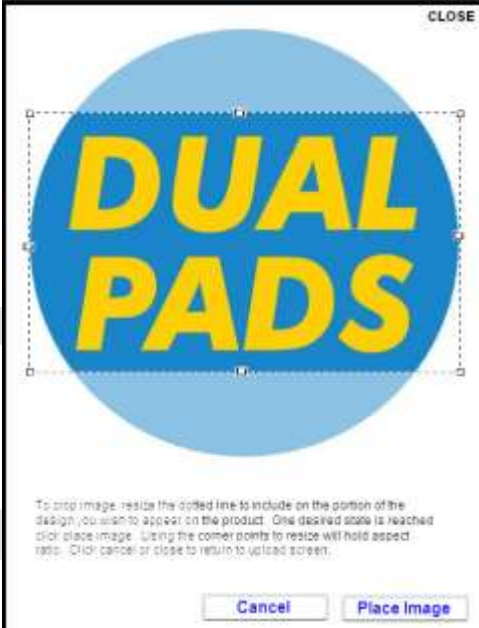
5.1.1. Image Upload

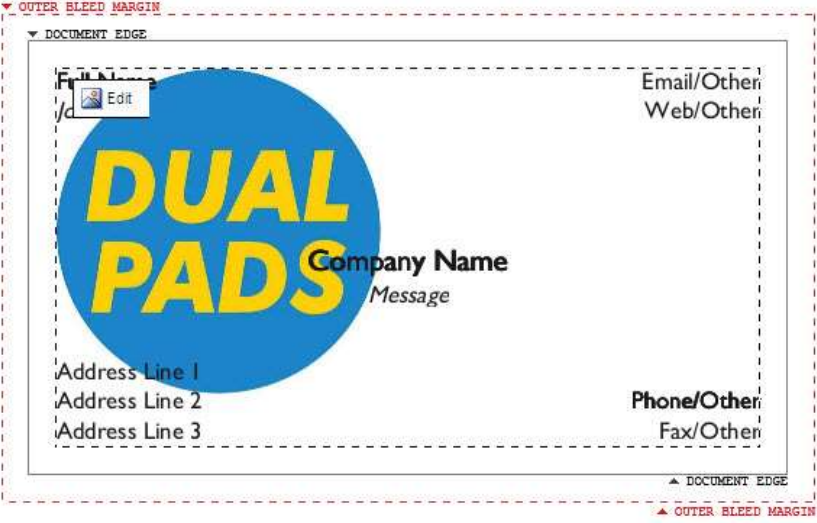

This is the page that will present when the customer selects to upload an image. There will be a button to browse the computers files to locate the image desired. Once located the file will populate the field and clicking upload will upload the image which will be added to the right Recent Uploads.

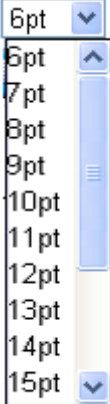

Note: The customer will be allowed to upload as much as they want. However, to ensure that final production files can be used by the Stores and Taylor, the total uploaded files applied to each product will not exceed 20 MB total. The pixel size of images allowed will be up to a maximum of 10,000 Pixels in height and width. If a custom image size is too large to fit on product area, the studio will default to loading it to fit the product dimensions, even if the “Fit image to product dimensions” button is not selected. The customer may increase or decrease the file size from there in the studio as desired.

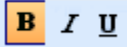
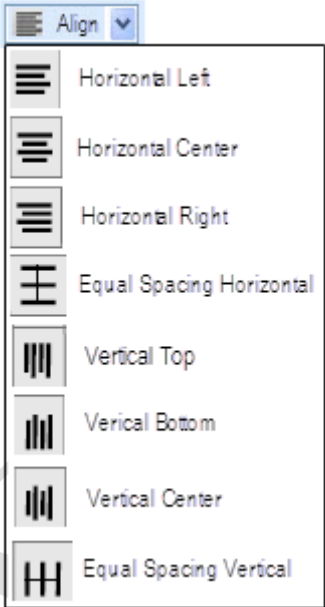


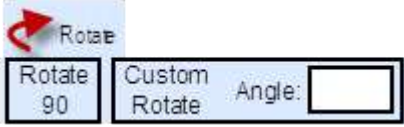
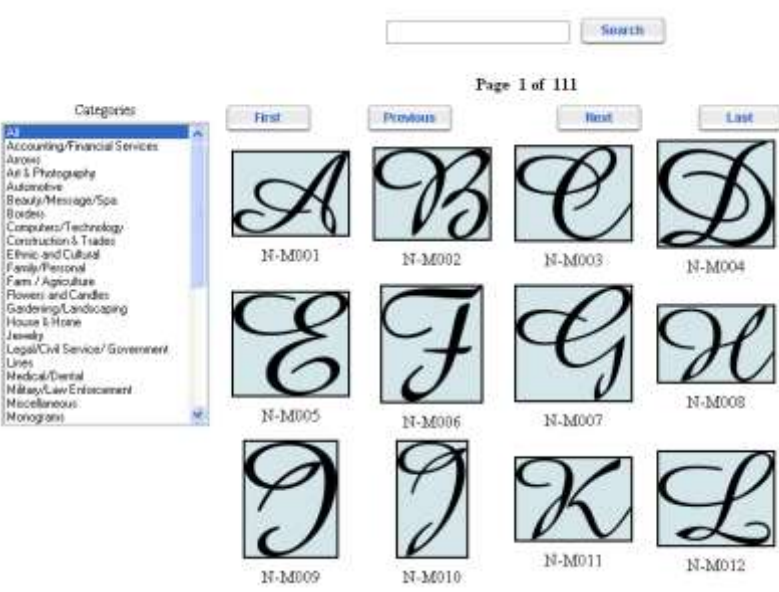
Use Case ID	Description
	<p>If the user should attempt to select an image that pushes them over this maximum file size they will be presented with an error message indicating applying the file selected will push them over the maximum file size allowed. They can click a button to return to the studio to delete other artwork already applied if desired, which will allow them to add additional artwork. Copy for this message will be written during the design/content phase of the project and is not dependent on PRD approval.</p> <p>UPLOADING: 100% 0.08MB of 0.08 MB</p>
	<p>As an image uploads a progress bar will be present below the browse upload area to let the user know something is occurring. If the image is a large upload it could appear as though the application has frozen, while the upload occurs. The line will progress as the image is uploaded. It will also indicate Uploading and the percentage complete. Finally the size of the image and the portion of the image that is still remaining will update as well.</p>

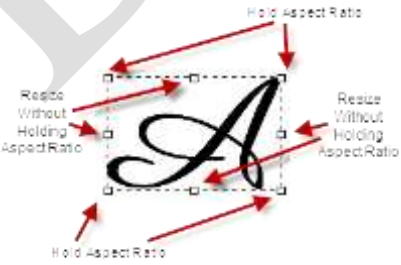
Use Case ID	Description
	
	<p>If the artwork is less than 300 dpi a warning message will pop-up that indicates “Your image resolution is less than 300 dpi, which may impact print quality. Would you like to proceed? If the user clicks yes, the image will be available for use. If they click no the image will not be added or available for use, but the user will remain on the upload page to locate another image. If the image was low dpi, it will be noted below the image in red “Low Res Artwork (list the dpi). If the image is above 300 dpi no message will present the image will automatically be added to the recent upload section. Below these images will display the dpi in green.</p>
	<p>If the user clicks on an image to the right it will be applied to the studio at its current size. The customer can further resize in the studio if necessary. Below each image uploaded there will be a check box with text that indicates “Fit image to product dimension”, if this is checked and the user clicks on the image it will be applied to the studio to fill the product area to the bleed line as close as possible without distorting the image ratio. If the user chooses to crop see below, the size of the image applied from that page will follow the rule that if this box is not checked it will load to image size, if the box is checked it will try to fill the product area with the cropped image to the bleed. The customer can still resize in the studio if desired.</p> 
	<p>There is a link below each image that indicates Crop. If this link is clicked a pop up window will appear with that particular image, there will be dashed line that allows the user the ability to only select a portion of the image to apply to the studio. If the user clicks on a corner point the aspect ratio of the crop area will be maintained as resized, if the user selects and resizes the crop area from a point on a straight line, the aspect ratio could change. There will be some helpful text that indicates “To crop image, resize the dotted line to include only the portion of the design you wish to appear on the product. Once the desired state is reached click place image. Clicking cancel or close will cancel the crop action and return the user to the main upload page. If the user clicks “Place Image” the cropped image area indicated will be applied in the studio.</p>


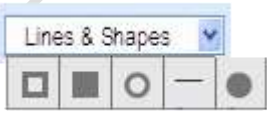
Use Case ID	Description
	
	<p>Once an image has been added to the studio, dragging the cursor over it will present an Edit box, clicking this will bring the user to the upload page with this particular image loaded on the pop that would allow the user the ability to re-crop or make changes.</p>
	<p>The studio tool bar will need to have a drop down to list all the possible fonts. Based on product and business rules fonts will vary. Fonts will be shown in the actual font, to give the user an idea of what the font will look like. If the product has a great number of fonts there will be a scroll to the right, allowing the user to access additional fonts without the window becoming too long for the page. If the font names are lengthy the window that opens will be large enough to accommodate the font name rather than having a scroll at the bottom, this will allow the user to see the complete font names.</p>  <p>Note: It is possible that changing a font may produce a shorter or longer line than what was originally placed. If the text becomes too long to fit on the product, the studio should keep the new font selected but apply the largest possible point size that would fit. In the warning area above the product display it should indicate, "Largest possible font size has been applied."</p>

Use Case ID	Description
	<p>If the font selected still won't fit even when the smallest point size has been applied, then in the warning area the following message should display, "Line X is too long, please make adjustments".</p>
	<p>The studio tool bar will need to have a drop down to list all the possible fonts point sizes. Font sizes will be specified per product as part of the business rules for each item. If the product has a great number of pt. sizes, there will be a scroll to the right, allowing the user to access additional fonts without the window becoming too long for the page. If the pt. sizes become greater and the character counts lengthy, the window that opens will be large enough to accommodate the point size rather than having a scroll at the bottom; this will allow the user to see the complete pt. sizes without scrolling to the right.</p>  <p>Note: It is possible that changing the font size will create a line that is too long for the product. If this occurs, if applying the font size requested is too long, we should display the largest possible font that would fit. Then in the warning area above the product display it should indicate, "Largest possible font size has been applied."</p>
	<p>The studio bar will need to have a color box, clicking on this tool will open a pallet of colors to choose from. These colors will need to be set, possibly by product which will be specified in the Business Rules for products. Selecting one of the colors from the pallet will alter the color of any text selected or any stock logo selected. In some instances it may also be possible to colorize uploaded images as well. Some business rules will require that changing the color will alter the color or all text and image elements on the product.</p>  <p>Keeping the Color Box as it is today in the FCP Retail tool bar.</p>

Use Case ID	Description
	<p>The studio bar will need to have font tools that include Bold, Italic, and Underline. Using these tools will alter any selected lines to bold, italicize or underline text or return the lines to unbold, unitalicize or un-underline. When a line of text is selected if the line has Bold, Italic or Underscore elements it will highlight them as shown below:</p>  <p>Note: If the user chooses to select multiple lines its possible one line is bolded and the other might not be. If this is the case, the tool bar won't indicate anything. If the user chooses to apply one of these tools it will bold all text selected.</p>
	<p>The studio bar will need to have alignment tools. Left, Right and Center justification for horizontal & vertical lines. As well as having the ability to equally space multiple lines selected. Using these tools will alter any selected lines to right, left, center, top and bottom justify text inside the imprint area either horizontally or vertically.</p>  <p>Left Horizontal – The x position of the text will change, the y position of the text will remain the same.</p> <p>Center Horizontal – The x position of the text will change, the y position of the text will remain the same.</p> <p>Right Horizontal – The x position of the text will change, the y position of the text will remain the same.</p> <p>Equally Space Horizontal – The x position of the text will remain the same, the y position of the text will change for any lines in between the top & bottom lines. Top & Bottom lines will remain with the same x & y coordinates.</p> <p>Top Vertical – The x position will remain the same, the y position of text will change.</p> <p>Center Vertical – The x position will remain the same, the y position of text will change.</p> <p>Bottom Vertical – The x position will remain the same, the y position of text will change.</p> <p>Equally Space Vertically – The x position of the text will change, the y position of the text will change for any lines in between the top & bottom lines. Top & Bottom lines will remain with the same x & y coordinates.</p>

Use Case ID	Description
	<p>Note: With equal spacing it's possible that the copy selected to be equally spaced could exceed the product imprint area. If this is the case an error would need to indicate that the "Text had exceeded the product imprint height or width."</p> <p>Vertical Alignment is needed to work with text that has been rotated.</p>
	<p>The studio box will need a rotate text tool. Clicking on this icon will display a tool to either rotate in increments of 90 degrees clockwise with each click (0, 90, 180, 360) or have a custom rotate field the user can enter a degree, allowing values of 0 to 360 degrees clockwise.</p>  <p>Entry of anything above or below this range will display direction that the "A line can only be rotated 0 to 360 degrees." The user can rotate both text and stock or custom images. If the text when rotated will no longer fit on the product a message will appear that the "Action has been cancelled as rotated text will no longer fit on the product."</p>
	<p>The studio tools need to have an Add Stock Logo button. Clicking this will display the Stock Logo selection page. The logo selection window opens with categories to the left to assist and narrow down what the user might be looking for. There is also a search bar that will allow the user to locate logos via keywords and return search results. Once a logo is selected the logo will be applied to the product in black. The user can then resize or colorize and move the stock logo to the desired location.</p>  <p>Note: Artwork can be moved outside of the imprint area & cut mark to bleed if desired.</p>
	<p>The studio tool needs to have an Add Image button. Clicking on this will present an upload page where the user will be presented with information about uploading artwork and what is acceptable. There will be a browse button that will allow the user to search their computer for an image to upload. Once an image is selected the user will click on upload. As the image uploads an upload status bar will indicate progress as the image uploads, to indicate to the user</p>

Use Case ID	Description
	<p>that something is occurring. Once uploaded the images will be saved as recent uploads indicating the DPI of the image. The user may then select the image to apply it to the studio & product. They will have the ability to crop the image via an edit tool on the image in the studio or where the image is saved as a recent upload.</p>
	<p>Acceptable upload file types will include:</p> <p>Pdf, Tif, Tiff, Jpeg, Jpg, Jpe, Bmp, Eps, Gif, Png</p> <p>When a file has been uploaded to the site, any un-used images will be stored for a total of 7 days and then deleted.</p> <p>If a file has been used in an order the original file upload and production file will be stored or available for a total of 2 years.</p>
	<p>Acceptable file sizes include:</p> <p>File Size: 20 MB – In total for each product configured.</p> <p>Maximum Width & Height: 10,000 Pixels</p>
	<p>The Upload function will require the following information be displayed to the customer:</p> <p>Text here will be completed during the design/content phase, which is not dependent on the PRD approval.</p> <p>Recommended File Type Explain the Bleed Area Explain Product Sizes & Pixels Explain Raised Print Explain Stamp Uploads Explain Copyright Rules</p>
	<p>Once an image (Stock or Custom) is uploaded selecting it will display 8 points on the image. The points in the corners if clicked and dragged will hold the aspect ratio of the image. If the user selects one of the points on the lines they can increase or decrease the size of the image, but will distort.</p>  <p>Images can be resized to fit inside the imprint area or they can freely extend into the bleed area or outside of the product area to give a bleed affect.</p>

Use Case ID	Description
	<p>The studio will have nudge capability. Once the user selects an item, either text or an image, the user can use the keyboard arrows to nudge the object up, down, left or right by using the arrow keys.</p>
	<p>Zoom in and Zoom Out functionality is available to help a user see some of the changes they are making to their product. Zooming out will increase the product area including all elements on the product, bleed area, cut marks, imprint area text entry images uploaded, etc. Zooming in will reduce the size back down in increments. If zoomed to maximum or minimum size clicking zoom in and out will not increase or decrease the product further.</p>
	<p>Grid tool will be available in the tool bar. Clicking the, "Grid" button will display the grid. If the grid is applied it will be highlighted in the tool bar. If the grid button is clicked again it will become unselected and remove the grid from the product area.</p>
	<p>If the zoom tool is used while the Grid feature is engaged, the grid should increase or decrease with the zoom in and out feature.</p>
	<p>A new icon will appear in the tool bar for Symbols. Clicking this will display several common symbols. Once the symbols are shown the user can select one to apply to the document.</p>  <p>Note: The user must be clicked on a text entry field to have the symbol appear. If multiple lines are selected the symbol will be added to all lines.</p>
	<p>Lines & Shapes are available in the Stock Logos, but this is a short cut to select basic squares, circles and line shapes (outline and solid image). Clicking the shape tool will display these options, clicking on one will add the shape to the studio where it can be resized or colored.</p> 
	<p>Spell Check, clicking this tool will check the spelling of all text entered offering suggested changes, if the user chooses to make a change the changes should be applied to the document.</p>
	<p>Need Help – Will be available as a link above the studio tool bar. This page will need to be</p>

Use Case ID	Description
	rewritten after all studio functionality is agreed upon during the design/content phase which is not dependent on PRD approval.
	Clicking the Delete button will remove any images or text selected in the studio.
	A new link will be added to the studio "Change Background", using it will allow the user to select a new template background, but apply it to the studio keeping all images/text that have already been entered by the user.
	<p>There will need to be a link for products that have a back side so the customer can navigate there if desired. If on the backside there will be a link to return to the front if desired.</p> <p>Note if an item is automatically 4/4 once the design is completed on the front the customer will automatically be moved through to design the backside. If the back side is just an option, the customer won't automatically be directed there, but if on the backside tab in the order options they choose to add a back side they can do that and if they select custom, they will be brought back to the studio to design if they haven't already done this. If they designed the backside in the studio prior to reaching the backside tab, the custom option will be pre-selected.</p>
	There will be a link that will allow the customer to change backside. Clicking this link will return the user to the designs for the product they selected if a design is selected the customer will be returned to the studio with all images and text that had been uploaded on the previous image there, but on the new background.

5.2. STAMPS STUDIO W/ ADVANCED DRAG & DROP

The appearance and functionality of the Stamps Studio is very similar to the Print Studio with some differences outlined in further requirements below.

Use Case ID	Description
	All Cosco stamps will be updated to their new marketed imprint areas.
	The number of available lines for each stamp will be predefined.
	The user can insert text on all lines and the stamp impression area will fill when in auto-size mode.
	The default mode when entering the studio will be to have auto-sizing on. This is because such a large majority of stamps are text only and the auto-sizing is the easiest way to get the desired effect on a stamp filling the impression area.
	There will also be a Turn Autosize Off button to allow the user to turn off the auto-size feature. The Turn Autosize Off button will change to Turn Autosize On when clicked.
	Having auto-sizing off will force all text entry to fill the stamp impression area. All lines will be equal in point size in this mode.
	Each line can have different fonts and formatting (bold, italic underscored) if desired and if they still fit the length of the impression area.
	If the line doesn't fit, an error message will display telling the user that the line is too long.
	It is not possible to edit the point size of the lines when Autosize is on. If the user tries to edit point size, a message would appear that point size can't be edited in when Autosize is on.

Use Case ID	Description
	<p>Drag and drop functions are available when not in auto-size mode (when Turn Autosize Off button has been clicked). This provides the user/customer the ability to drag lines. If a line or lines are moved off the impression area they will snap back to the closest imprint area where the line was dragged off.</p>
	<p>The studio will have an add text button; however, this will be shaded and not available for stamps. This will prevent the user from adding lines that won't fit if the user desired to return to auto-size mode where it wouldn't be possible to include any additional lines.</p>
	<p>When auto-size is turned off, the lines can be resized individually and the pt. size tool will be available for edit. Edits when auto-size is off could result in unexpected errors, including:</p> <ul style="list-style-type: none"> ▪ Lines may overlap each other in order to produce the size requested. ▪ Lines may become too long in length at the requested point size, if this occurs the action will be cancelled for that particular line and it will be left in the point size that fit previous to this action, with a message to the user that the action was cancelled. ▪ Lines may become too tall to fit the impression area, if this occurs the action will be cancelled for that particular line and will be left in the point size that fit, previous to this action with a message displayed to the user that the action was cancelled.
	<p>A new border tool will be available in the tool bar for the Stamp Studio. If the user clicks on the border, the border will be applied to the product impression area. If they click the border tool bar again the border will disappear from the impression area.</p>
	<p>Because stamps are only single-color, if the user uploads something in more than one color, the image will be converted to a gray scale and will load in the ink color selected.</p>
	<p>Any images applied will be free flowing, so available to resize, drag & drop and can bleed. This is the case for image regardless if auto-size mode is on or off.</p>
	<p>It is possible that the customer may upload an image with pages that won't produce well on a stamp. Files of this nature don't produce well on several products including stamps which have an imprint that prints ink or it doesn't with limited ability to show lesser ink.</p>
	<p>The color tool bar will only have the appropriate ink colors available, dependent on stamp product. Clicking on a color will recolor all elements in the studio that color (text, custom logos, stock logos or borders).</p>
	<p>Other features that will be available like the requirements listed above:</p> <ul style="list-style-type: none"> ▪ Alignment ▪ Grid ▪ Symbols ▪ Stock Logos ▪ Custom Upload ▪ Spell Check ▪ Rotate Tool ▪ Line Tool ▪ Shape Tool ▪ Zoom in and out ▪ Delete

Use Case ID	Description
	<p>In the studio for stamps only the outer imprint area margin will be shown. There won't be a bleed or text imprint area like print products.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="margin: 0;">Line 1 Line 2 Line 3 Line 4 Line 5 Line 6 Line 7</p> </div>

Notes

- With the *Instant Brother Stamps*, each ink color indicated in the SKU will be determined prior to entering the design studio. So for these products the studio will need to load with the ink color pre-determined, any text or images will automatically appear in the ink color associated with the customer selection.
- The fonts available for stamps are specific and differ from other products.

5.3. DATERS STUDIO

Must select **Preview** to view change

PREVIEW **Approve**

Color Black Text with Black Date ▾

Outer Border On Off

Apply All Apply All

— Straight Text On Top

Helvetica ▾ 8pt ▾ B / U L C R

Helvetica ▾ 8pt ▾ B / U L C R

— Straight Text On Bottom

Helvetica ▾ 8pt ▾ B / U L C R

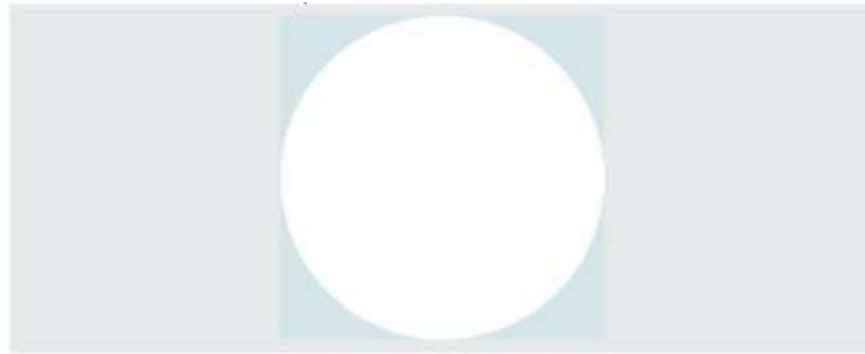
Helvetica ▾ 8pt ▾ B / U L C R

Use Case ID	Description
	Dater Studio will only allow text – no image uploads.
	<p>Dater Studio will not allow drag & drop lines.</p> <p>Note: Lines available will be set based on the Dater Business Rules.</p>
	Product description will appear above the product preview.

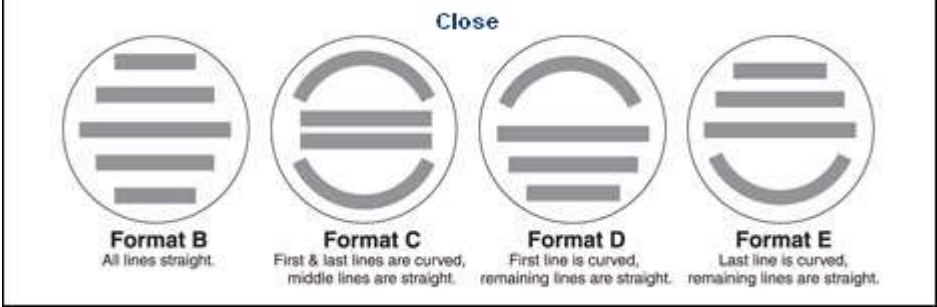
Use Case ID	Description
	There will be a product preview area at the top of the page.
	There will be a Preview button below the product preview area.
	The Preview button must be clicked in order to view work in the product preview area. There will be a text message below the Preview button that reads, "Must select Preview to view changes."
	Product configuration will be possible through the following options (fields): <ul style="list-style-type: none"> ▪ Color ▪ Outer Border ▪ Straight Text on Top ▪ Straight Text on Bottom
	The Color drop-down list will display configuration options for the stamp as defined by the business rule ink options for the product text and date text.
	The customer may apply a border by clicking the On radio button in the Outer Border field. Clicking the Off radio button in the Outer Border field will remove the border.
	The customer can select font, point size, format (bold, italic, underscore), and justification (left, right, center) for each text line added.
	An Apply All check-box displays above the line formatting section(s). Selecting this box that will change all lines to the font formatting selected in the first line (to save time making edits)..
	It is possible that the customer may enter text that is too long for the point size available, if this happens a red warning message will display that reads, "Line X: Test Too Large." The site will not display the line that is too long.
	A product preview must be generated prior to approving for order. The Approve button will be grayed out and not available until a preview has been generated. The Approve button will be available after the user has clicked the Preview button to view most recent changes.
	The Approve button will be grayed out and not available if a line has an error. This is a default function to prevent the user from proceeding with an order that contains an unexpected result. The Approve button will be available once the line issue is addressed and the product has been previewed.
	If there is more than 1 line of text above AND below the date, and the customer enters only 1 line of text or less than the full number of lines available, the text will be centered in the area from top to bottom. If there is more than a single line the lines will be still be centered top to bottom and equally spaced apart from each other. ¹¹


¹¹ Not sure what this means.

5.4. ROUND STAMPS STUDIO



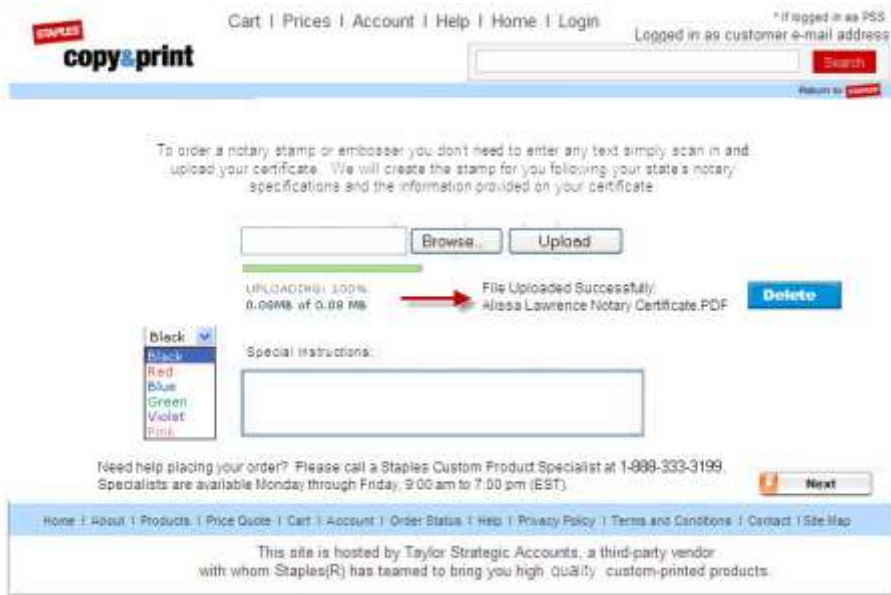
Use Case ID	Description
	Round Stamps Studio will not allow drag & drop lines. Note: Lines available will be set based on the Round Stamps Business Rules.
	Product description will appear above the product preview.
	There will be a product preview area at the top of the page.
	There will be a Preview button below the product preview area.
	The Preview button must be clicked in order to view work in the product preview area. There will be a text message below the Preview button that reads, "Must select Preview to view changes."

Use Case ID	Description
	<p>The stamp format is shown to the left below the preview area.</p> <p>The Click to Change Format link will display above the current stamp format icon. Clicking this link will display the following pop-up window. The user will either select a format option to change stamps or click the Close link to return to the format already selected.</p> 
	<p>The layout (curved or straight) of the lines changes based on the format selected, as does the criteria for determining line behavior (first, last, first & last, remaining). The studio will load the correct format option to the right based on the stamp format selected.</p> <p>Please note that depending on the size of the round stamp some of these formats could change.</p>
	<p>Product configuration will be possible through the following options (fields):</p> <ul style="list-style-type: none"> ▪ Color ▪ Outer Border ▪ Curved Text on Top ▪ Curved Text on Bottom
	<p>The Color drop-down list will display configuration options for the stamp as defined by the business rule ink options for the product text and date text.</p>
	<p>The customer may apply a border by clicking the On radio button in the Outer Border field. Clicking the Off radio button in the Outer Border field will remove the border.</p>
	<p>The customer can select font, point size, format (bold, italic, underscore), and justification (left, right, center) for each text line added.</p>
	<p>An Apply All check-box displays above the line formatting section(s). Selecting this box that will change all lines to the font formatting selected in the first line (to save time making edits).</p>
	<p>The customer clicks the Add Custom Art/Logo button to upload their own images. Upon clicking this button, a message displays providing some helpful suggestions regarding artwork for stamps. For instance, "For best results, upload black and white artwork. Any white space surrounding uploaded artwork will not appear on the final round stamp. Try to avoid pages as these often produce poor impressions."</p>
	<p>The Upload page displays after clicking the Add Custom Art/Logo button.</p>
	<p>Because stamps are only single-color, if the user uploads something in more than one color, the image will be converted to a gray scale and will load in the ink color selected.</p>
	<p>Clicking the Add Stock Logo button allows the user to choose from an online gallery of images that can be added to the stamp.</p>
	<p>An upload or stock logo can be applied to a round stamp, but can't be dragged and dropped. Only a single image (custom or stock) can be applied.</p>

Use Case ID	Description
	Selecting a stock logo will bring up the stock logo selection tool. Once a stock logo is selected it will be applied in the studio. All stock logos are B & W and don't have pages, so the warning is not necessary as outlined for Custom Art.
	Once a stock logo is applied the image area will update as covered in Round Custom Upload section and all changes will apply the same.
	<p>Once artwork has been added the image area will change to:</p> 
	There will be a button to remove art if desired.
	Size of the image can be changed based on a percentage.
	The customer can alter position of the art by indicating Horizontal (Right, Center, Left) & Vertical (Top, Middle, Bottom) Placement.
	View change will generate a preview to see these changes.
	Depending on the format will allow placement of some lines of text depending on where the image is located.
	<p>It is possible that the customer may enter text that is too long for the point size available, if this happens a red warning message will display that reads, "Line X: Test Too Large."</p> <p>The site will not display the line that is too long.</p>
	A product preview must be generated prior to approving. The Approve button will be grayed out and not available until a preview has been generated. The Approve button will be available after the user has clicked the Preview button to view most recent changes.
	<p>The Approve button will be grayed out and not available if a line has an error. This is a default function to prevent the user from proceeding with an order that contains an unexpected result.</p> <p>The Approve button will be available once the line issue is addressed and the product has been previewed.</p>
	<p>It is also possible to create a line that won't be considered too long, but that could nonetheless run off the edges of the product depending on the placement on the stamp.</p> <p>If text appears outside of the circle imprint area it won't appear on the final product.</p>

5.5. NOTARY STAMPS & EMBOSSERS UPLOAD STUDIO

Dot-com Notary Upload



Retail Notary Upload:



Use Case ID	Description
	The pages will indicate, "To order a notary stamp or embosser you don't need to enter any text, simply scan in and upload your certificate. We will create the stamp for you following your state's notary specifications and the information provided on your certificate."

Use Case ID	Description
	There will be a field to with buttons to browse to locate and upload the file. While the file is uploading the progress bar will be present. Once a file is uploaded the file will indicate File Uploaded Successfully: Listing the file name with a button to delete. If the user tries to upload another file an error message will appear that only 1 file upload is allowed for your certificate. You can delete the previous file to start a new upload if needed. If the file is deleted the upload function would be available again.
	There will be an ink selection drop down. Most notary stamps are black, so that will be default.
	Determine if a Special Instructions would be helpful or problematic for this product offering.
	There will be a next button to continue to the Quantity/Price selection process.
	Dot-com & retail are very similar with this product flow the only difference is the headers & footers and the additional text in dot-com. The added text indicates, "Need help placing your order? Please call a Staples Custom Product Specialist at 1-888-333-3199. Specialist are available Monday through Friday, 9:00 am to 7:00 pm (EST)."
	After the certificate is uploaded the customer will select options typical stamp options Quantity/Price.
	There will be an accessory/matching page where the customer will be able to add any recommended accessories or matched items.
	Once a customer has selected a notary stamp size or embosser type and size, rather than going to an imprint/design studio the customer will be directed to a page that will allow the user to upload their notary certificate.
	The Notary stamp or embosser will go into the cart. A production ready file will not be available as these require MCC to set-up the stamp based on the state specs, so these products will need to be flagged and flow through production differently in the backend.

5.6. ENGRAVED STUDIO

Taylor has a variety of ways to offer engraving to clients, we are in the process of seeing if this can be enhanced and therefore haven't determined if the new version of the engraving studio will be included in 2.0 launch. Taylor will communicate what method of studio will be used to handle Engraving when clear direction is available.

5.7. IMPRINT AREA STUDIO (FORMS)

The Imprint Area Studio is similar in functionality to Drag & Drop Studio. Refer to the [Drag & Drop Studio section](#) for clarification.

Use Case ID	Description
	The imprint area studio will be similar in functionality to the Drag & Drop Studio. Only difference in the studio, it will allow the customer to design only in the imprint area, not the entire product area. When the customer previews, their custom area will preview on an image of the document they have selected.

5.8. BLEED PREVENTING STUDIO – SELECT DELIVERY & INSTANT PRODUCT

The Studio for Instant Produced in Store products is similar in functionality to Drag & Drop Studio. Refer to the [Drag & Drop Studio section](#) for clarification.

Use Case ID	Description
	A safety margin specified for each product around the edge of the document that will prevent the customer from placing text and images preventing bleeds. Nothing moved into this bleed edge area will display.
	For Instant Letterhead, the Final Cut Product Size is 8-1/2" x 11", and the Safety Margin to prevent bleeds 4 mm on all sides.
	For Instant Envelopes, the Final Cut Product Size is #10 Envelope, and the Safety Margin to prevent bleeds 9 mm on the left, 6 mm on the top and bottom, and 36 mm on the right.
	For Instant Large Mailing Labels, the Final Cut Product Size is 5" w x 4" h, and the Safety Margin to prevent bleeds 1/16" on all sides.
	For Instant Small Mailing Labels, the Final Cut Product Size is 4" w x 2" h, and the Safety Margin to prevent bleeds 1/16" on all sides.
	For Instant Return Address Labels, the Final Cut Product Size is 2.625" w x 1" h., and the Safety Margin to prevent bleeds 1/16" on all sides.
	For Instant Jotters, the Final Cut Product Size 3" w x 5" h., and the Safety Margin to prevent bleeds 1/8" on all sides.

Notes

- Stationery Delivery Envelopes – Need to prevent bleeds; Actual measurements TBD
- Business Envelopes – Need to prevent bleeds; Actual measurements TBD
- Catalog Envelopes – Need to prevent bleeds; Actual measurements TBD

5.9. CORPORATE KITS DATA ENTRY AND PREVIEW PAGE

Fill in your imprint information
and click 'Update Preview'
to view your selections.

[Update Preview](#) [View Template](#)

This preview is not an exact representation; actual size may vary.
Please use preview image to verify that spelling, ink colors and any artwork are correct.

Product Color: Black

First Certificate Signature: President
[View All First Certificate Signature Options](#)

Second Certificate Signature: None
[View All Second Certificate Signature Options](#)

Kind of Stock: Common
[View All Kind of Stock Options](#)

Embosser Direction: From the Right
[View All Embosser Direction Options](#)

* Denotes Required Fields

Name of Corporation (max. 80 char.):

* **Month and Year of Incorporation**
HI & CA: mo., day & year (max. 10 char.):

* **State of Incorporation (max. 2 char.):**

Number of Authorized Shares (max. 11 char.):

* **Par Value (max. 11 char.):**

Certificate Number
(Indicate starting number) (max. 4 char.):

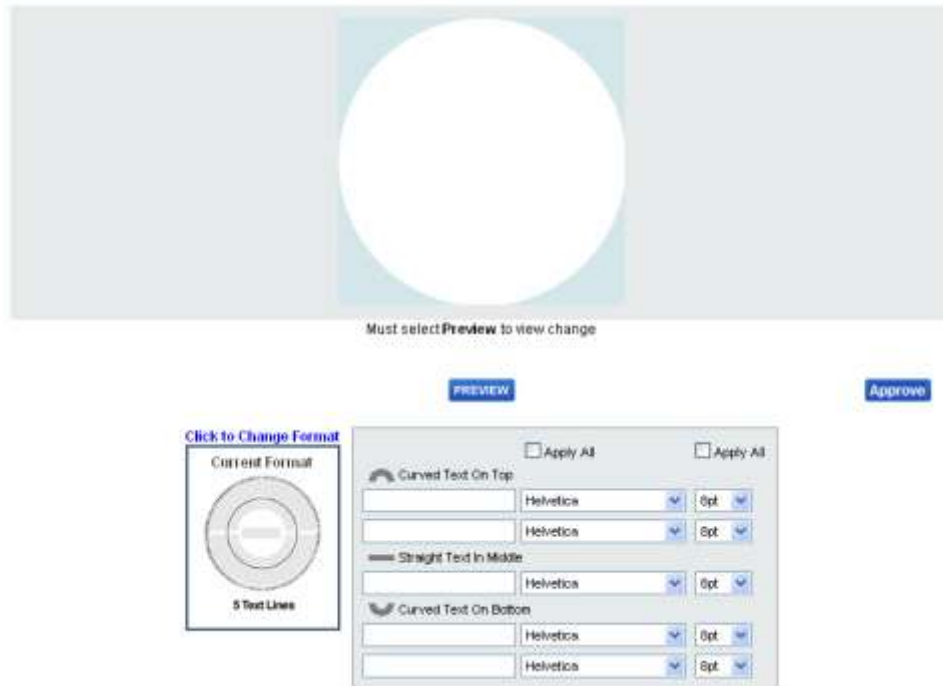
12

Use Case ID	Description
	The user completes entry in the fields that display on the page below the preview area.
	Clicking the Update Preview button will display a template with Corporate Kits lines with text entry to the right to give the user an idea of where the text would appear.
	This order type will pass text to the backend where the item will be configured.

¹² Need more information here.

5.10. EMOSSER STUDIO

The embosser studio is very much like the [Round Stamp Studio](#) with a few changes. There are no options for selecting ink color or border, except for what is included with the embosser selected or image uploaded.



Use Case ID	Description
	<p>The embosser format is shown to the left below the preview area.</p> <p>The Click to Change Format link displays above the current embosser format icon. Clicking this link will display the following pop-up window showing the other embossers available for selection. The user will either select a format option to change embossers or click the Close link to return to the format already selected.</p> <div data-bbox="626 1262 1224 1776" style="border: 1px solid black; padding: 10px; text-align: center;"> <p>Close</p> </div>
	<p>If a new embosser format is selected, the studio will load with the appropriate lines available for the new format.</p>

Notes

- A selection page will provide the user the option to indicate the direction they would like their embosser (Top, Bottom, Left or Right).

6. PRODUCT CONFIGURATION AREA

Each product has specifications that may require edits to the options in the studio that will be documented here. Each product will have options to select in the ordering process these will be captured here.

6.1. BUSINESS CARDS

6.1.1. Delivery Business Cards

Use Case ID	Description
	Appointment Cards and Loyalty Cards will now just be part of a design category rather than a separate product.
	Vertical Business Cards need to be added to the system.
	There are some 2-Color Business Cards that in the studio will need to limit ink color selections made on text and images.
	There is an Economy Business Card that the studio will need to force all text and images to be black or black gray scale only.
	Possibly modify the back copy flow for Business Cards and other products that have a back copy to design.

6.1.2. Instant Business Cards

Use Case ID	Description
	Appointment Cards and Loyalty Cards will now just be part of a design category rather than a separate product.
	Vertical Business Cards need to be added to the system when possible. Note Staples will need to help determine if there are any vertical designs that would be difficult to produce in store that should be avoided for the Instant offering.

6.2. STATIONERY

6.2.1. Delivery Envelopes

Use Case ID	Description
	Need to prevent bleeds on all sides. No designs will have artwork that bleeds.
	There are some 2-Color Envelopes that in the studio will need to limit ink color selections made on text and images.

Use Case ID	Description
	There is an Economy Envelope that the studio will need to force all text and images to be black or black gray scale only.

6.2.2. Delivery Letterhead

Use Case ID	Description
	There are some 2-Color Letterhead that in the studio will need to limit ink color selections made on text and images.
	There is an Economy Letterhead that the studio will need to force all text and images to be black or black gray scale only.

6.3. Stamps

6.3.1. Pre-Inked and Self-Inking Stamps

Use Case ID	Description
	Stamps are only available in a single color. The studio will need to limit ink colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.4. Business Envelopes

6.4.1. Delivery #10, #9 and #6-3/4 Envelopes

Use Case ID	Description
	Need to prevent bleeds on all sides. No designs will have artwork that bleeds.
	There are some Business Envelopes with a window, in the studio this area will be shown in gray with text that nothing should be placed in the window area.
	There are some 1 Color Business Envelopes that will need to limit ink colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.4.2. Catalog Envelopes

Use Case ID	Description
	Need to prevent bleeds on all sides. No designs will have artwork that bleeds.
	There are some black only Business Envelopes that will need to limit ink colors to black for all text and images.

Use Case ID	Description
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the black.

6.5. Forms

6.5.1. Standard or 1 Color Custom Forms

Use Case ID	Description
	There are some 1 Color Forms that will need to limit ink colors to 1 color for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.6. Labels

6.6.1. Advertising & Weather Resistant Labels

Use Case ID	Description
	There are some 1 Color Advertising Labels & Weather Resistant Labels that will need to limit ink colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.6.2. 1 Color Imprint Mailing Labels

Use Case ID	Description
	There are some 1 Color Imprint Mailing Labels that will need to limit ink colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.7. Post-it-Notes®

Use Case ID	Description
	There are some 1 Color Post-it-Notes® that will need to limit ink colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.8. Folders

Use Case ID	Description
	There are some 1 Color Imprint Products like Foil Stamped/and Raised Ink Folders that will need to limit ink colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.9. Badges

Use Case ID	Description
	There are some 1 Color Imprint Products like Engraved Badges & Luggage Tags that will need to limit imprint colors to 1 color option for all text and images.
	There are some Black only Imprint Products like Metal Engraved Badges that will need to limit imprint color to Black only for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.10. Yard Signs

Use Case ID	Description
	There are some 1 Color Imprint Products like Yard Signs that will need to limit imprint colors to 1 color option for all text and images.
	There are some 2 Color Imprint Products like Yard Signs that will need to limit imprint colors to 2 color options for all text and images
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.11. Magnetic Signs

Use Case ID	Description
	There are some 1 Color Imprint Products like Magnetic Signs that will need to limit imprint colors to 1 color option for all text and images.
	There are some 2 Color Imprint Products like Magnetic Signs that will need to limit imprint colors to 2 color options for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.12. Banners

Use Case ID	Description
	There are some 2 Color Imprint Products like Banners that will need to limit imprint colors to 2 color options for all text and images.

Use Case ID	Description
	There is an Economy Banner that will be limited to 1 Imprint Color White that the site will need to limit the imprint text or images to that single color only.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.13. Raffle Tickets

Use Case ID	Description
	There are raffle tickets that only allow a Black Imprint, the studio will need to force all text and images to be black or black gray scale only.

6.14. Plastic Cards

Use Case ID	Description
	There are some 1 Color Imprint Products like Plastic Cards that will need to limit imprint colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.15. Desk & Wall Signs

Use Case ID	Description
	There are some 1 Color Imprint Products like Engraved Desk and Wall Signs that will need to limit imprint colors to 1 color option for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.16. Vinyl Decals

Use Case ID	Description
	There are some 2 Color Imprint Products like Vinyl Decals that will need to limit imprint colors to 2 color options for all text and images.
	If an image is Full Color or multi-color it will be changed to gray scale and applied to the studio in the ink color selected.

6.17. Note Cards

Use Case ID	Description
	A Stock Verse button will be available in the studio. Clicking the button would bring up a stock verse pop-up that would provide a few social types of copy to add to the product. Example: Wedding, Anniversary, Birthday, Business Announcement, etc.

Use Case ID	Description
	<p>Each stock text verse would load the whole invitation text minus some information the customer must enter to the left in text field, such as name, date, time, address, etc., as specified per verse.</p> <p>Example:</p> <p style="padding-left: 40px;">[Bride's Parent's Names text entry field] Request the honor of your presence At the marriage of their daughter [Bride's Name text entry field] to [Groom's Name text entry field] son of [Groom's Parents Names text entry field] [Day of the week text entry field], the [day of the month text entry field] day of [month text entry field], [year text entry field] at [time text entry field] [Where text entry field] [Address 1 text entry field] [Address 2 text entry field]</p>

7. CONTROL PANEL

The Control Panel is accessed by several groups and for a variety of different functions. This section will outline these groups, the functionality provided to them, and the level of access to information provided in the Control Panel.

Use Case ID	Description
	Access to the Control Panel will be determined based on the user and the user's entry path with option to add filters and settings that enable/disable/limit access to information.

7.1. CONTROL PANEL LOGIN

The Control Panel contains sensitive information and requires login with user ID and password to ensure that only the appropriate users from Staples & Taylor can access it.

7.1.1. Retail Control Panel Login

Use Case ID	Description
	Users can only access the Control Panel on Retail versions of the site through secure login.
	Once logged into the Retail Application, there is a link to the Control Panel in the header. Clicking this link will prompt for a login to gain access the user must enter the Store number of the original login & password: Staples.

Use Case ID	Description
	There are two devices where the Control Panel resides: MPS and RIK. Accessing the Control Panel from the RIK device will require a login every time, because RIK is the customer-facing terminal (and we want to ensure authentication so as to protect customer information). since Because the MPS device is behind the counter (secure) and for Associate use only, accessing the Control Panel from the MPS device will only require a login once, with a cookie being set after initial login so that the user will be able access the Control Panel skipping the login step,.
	In the Retail view of the Control Panel the Staples Copy & Print Logo is not available to be selected to bring the user to the site.
	Upon successful login to the Control Panel the Control Panel will indicate in the upper-right hand corner of the header, "Staples XXXX" (Store Number) and allow the user to click Return to Homepage . Selecting Return to Homepage will return the store to the ordering application.
	If a retail store logs in and accesses the Control Panel, the Orders page displays with orders automatically filtered for their store only. The orders shown will include any orders that the Associate placed while logged in AND will include any dot-com orders that contained in-store items directed to their location. The store will still have the filter abilities to search and view other orders if necessary.

7.1.2. Dot-com Control Panel Login

Use Case ID	Description
	Dot-com users can access the Control Panel directly via the URL.
	Dot-com users will be prompted to enter their User Name & Password to access the Control Panel.
	If the User Name and Password are correct, the user will be given Control Panel access to the features their login allows.
	The Staples Copy & Print logo in the upper right-hand corner of the Control Panel will be linked to the dot-com site. Once a PSS rep has logged into the Control Panel, they will use the linked logo access the dot-com site. The site will recognize them as a PSS rep based on their login, allowing them to skip some steps of the check-out process and track their sales as PSS orders.
	Upon successful login to the Control Panel a welcome message will display in the upper-right hand corner of the header, "Welcome, User Name."
	The header will also provide a link allowing the user to logout.
	If PSS or any other visitors to the Control Panel access the orders page, the orders will automatically be filtered to all orders. Displaying all search options to allow for the search ability to locate specific orders.

7.2. CONTROL PANEL FUNCTIONS

7.2.1. Orders

The Orders tab in the Control Panel is most frequently used to review order history and gather information.

7.2.1.1. Order Search/Filter

com clicking this link will access .com site and log all activity as PSS Rep. Retail this is not a link, just a static image.
.com via/oma; User Name & Logout option. Retail Staples XXXX (store #) with Return to Homepage link.

STAPLES copy&print CONTROL PANEL Welcome, unlawrence. LOGOUT

Click the Accounts

Tab's will be customized based on the user login & access

Filter: All Orders
 All PSS Orders
 All Store Orders
 All .com Orders

Customer Order No. PO Number Staples Rewards Customer No. Order Date From (MMDDYYYY) Order Date To (MMDDYYYY)

Customer Email First Name Last Name Store Number

Search Clear

*Not all fields searched are shown in results. Please note the 'Clear' button merely clears the search fields and does not conduct a search.

Order No.	PO No.	Channel/Store #	Order Status	Submitted On	Order Release Date	Customer Name	Order Total
XXXXXXXXXX	N/A	.com/XXXX	In-Store Only Order	MMDDYYYY HH:MM:SS AM/PM	None	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	Not Released	.com	Awaiting Payment	MMDDYYYY HH:MM:SS AM/PM	Not Released	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	XXXXXXXXXX	.com	In Production	MMDDYYYY HH:MM:SS AM/PM	MMDDYYYY HH:MM:SS AM/PM	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	XXXXXXXXXX	.com	Shipped	MMDDYYYY HH:MM:SS AM/PM	MMDDYYYY HH:MM:SS AM/PM	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	N/A	PSS/XXXX	In-Store Only Order	MMDDYYYY HH:MM:SS AM/PM	None	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	Not Released	PSS	Awaiting Payment	MMDDYYYY HH:MM:SS AM/PM	Not Released	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	XXXXXXXXXX	PSS	In Production	MMDDYYYY HH:MM:SS AM/PM	MMDDYYYY HH:MM:SS AM/PM	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	XXXXXXXXXX	PSS	Shipped	MMDDYYYY HH:MM:SS AM/PM	MMDDYYYY HH:MM:SS AM/PM	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	N/A	XXXX	In-Store Only Order	MMDDYYYY HH:MM:SS AM/PM	None	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	Not Released	XXXX	Awaiting Payment	MMDDYYYY HH:MM:SS AM/PM	Not Released	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	XXXXXXXXXX	XXXX	In Production	MMDDYYYY HH:MM:SS AM/PM	MMDDYYYY HH:MM:SS AM/PM	Mouse, Mickey	\$0000 View Order Reorder
XXXXXXXXXX	XXXXXXXXXX	XXXX	Shipped	MMDDYYYY HH:MM:SS AM/PM	MMDDYYYY HH:MM:SS AM/PM	Mouse, Mickey	\$0000 View Order Reorder

If an order contains multiple items that ship from multiple production facilities, there will be multiple Shipped lines.

In order to get to the information needed, the control panel will need to have a variety of filters and search fields to assist the user in finding the specific information they need.

Use Case ID	Description
	<p>Since the Control Panel will log all types of orders (Dot-com in store only, dot-com delivery only, dot-com mixed, dot-com PSS in store only, dot-com PSS delivery only, dot-com PSS mixed, Retail in store only, Retail delivery only and Retail mixed) there needs to be a means of filtering and searching that will make it easier to find the right order. Orders can be filtered by the following:</p> <ul style="list-style-type: none"> My Orders All PSS All Stores All dot-com

Use Case ID	Description
	The user can define multiple criteria. The search will not start until the Search button is clicked.
	If a retail store logs in and accesses the Control Panel, the Orders page displays with orders automatically filtered for their store only. The orders shown will include any orders that the Associate placed while logged in AND will include any dot-com orders that contained in-store items directed to their location. The store will still have the filter abilities to search and view other orders if necessary.
	A PSS Reps and all other users will default to seeing All Orders when accessing the Control Panel.
	<p>Search Option Fields that need to be available:</p> <ul style="list-style-type: none"> ▪ Customer Order Number – Site Order Number ▪ P.O. Number - This is the number used to release a dot-com order to production. ▪ Order Date Range - Date From (MM/DD/YYYY) – Date To (MM/DD/YYYY) ▪ First Name – First Name of the customer who placed the order. ▪ Last Name – Last Name of the customer who placed the order. ▪ Customer Email – Email used to place the order. ▪ Staples Rewards Number – If entered at checkout. ▪ Store Number – If a store number is entered this would return all results of orders placed by this store and in store directed orders to this store. <p>If a search doesn't produce any results the following message will appear, "Query returned no results, please check and possibly edit search criteria."</p>
	<p>The Search Results page will provide the following linked options to assist in navigating the information returned:</p> <ul style="list-style-type: none"> ▪ First ▪ Previous¹³ ▪ Next ▪ Last
	The Search Results page will provide a "jump to page" feature allowing the user to navigate directly to a specific page from among the search results. For instance, if the results return 20 pages, then the page will provide either links to all 20 pages (1, 2, 3, 4, etc.) or a visible thumbnail display of the 20 pages with the ability to jump to a specific page.
	The page will have a Search button and a Clear button. Clicking the Search button will initiate the search based on information entered in the search fields. Clicking the Clear button will remove the information that had been entered in the search fields.

¹³ Need to decide if we are using **Previous** and **Next** or **Back** and **Next**. I changed this to **Previous** to match statements elsewhere in the requirements.

Use Case ID	Description
	<p>The following columns of data will need to be available regardless of the type of user accessing the Control Panel:</p> <ul style="list-style-type: none"> ▪ Order Number – This is the site generated order number. All orders will have one of these. ▪ Channel/Store # – If the order is placed by a Retail store, the store number will be listed that placed the order or the in store item was directed to. If the order was placed by PSS list PSS if the order was placed by an online customer list dot-com. ▪ PO Number – This will display the site released Staples P.O. for SBD dot-com & PSS orders. When Staples Retail sends a release to the site that payment has been approved the site order number becomes the P.O. Number. If the order is not payment approved yet the site will display the status of “Not Released”. If it’s an in store only order it will never be released with a P.O. # so can indicate N/A for these instances. In Store Only Orders will never have a P.O. Number since they don’t go through a release process. ▪ Submitted On – Date and time the order was submitted in Eastern Standard time. ▪ Order Total – Total of the order (Need to discuss if we want to list the total of an in store order, currently site doesn’t do this.) ▪ Order Status – Provides the status of the order For in-store only order(s) (Dot-com & Retail), In Store Only Order is the only status. ▪ Delivery Order (Dot-com & Retail) – Awaiting Payment, In Production or once shipped will indicate Shipped with a link that will tie to the UPS site to track the shipment. Could be cancelled if payment is not received and either Kana deletes it or 90 days have passed and the orders are automatically cancelled. ▪ Mixed Cart Order (Dot-com & Retail) – Like Delivery Orders since the delivery portion of the order will need to be released. Awaiting Payment, In Production or once shipped will indicate Shipped with a link that will tie to the UPS site to track the shipment. ▪ Order Release Date - List the status of the order: <ul style="list-style-type: none"> ▪ In Store Only Order (Dot-com & Retail) – None ▪ Delivery Order (Dot-com & Retail) – Not Released or if Released the date and time the order was released in Eastern Standard Time. ▪ Mixed Cart Orders (Dot-com & Retail) – Like delivery orders since the delivery portion will be released. Not Released or if Released the date and time the order was released in Eastern Standard Time. ▪ Customer Name – The customer names will be displayed as Last Name First, First Name Last. ▪ View Order Link – Clicking here will display the orders details and contents of all items (In Store or Delivery) ▪ Reorder Link – Clicking here will display the orders items and allow them to be reordered if available, by selecting the items.
	<p>If an entry is made into a search field that doesn’t match the format the site will display an error requesting to correct.</p>
	<p>There will be a Chat button in the header that will display ONLY when an MCC associate is available to chat. The button will not display if there are no associates available.</p>

Notes

- Need to ensure that regardless of the filter option used or search conducted that it won’t impact performance to run the queries even if they become very large.

7.2.1.2. Order Details

Use Case ID	Description
	<p>The Order Details page provides the following:</p> <ul style="list-style-type: none"> ▪ View Order ▪ Order Number 1234567890 ▪ Submitted: MM/DD/YYYY Time HH/MM/SS AM/PM ▪ Email Address: Will be the email field entry upon ordering.
	<p>The Order Details page will also provide the Order Expected Delivery Date. This is the same date displayed to the customer on the Shipping Method page (method selected by the customer). Keep in mind that this date is dependent on order release occurring same day prior to 4:00 PM EST. The site will flip the expected delivery dates at 2:00 PM EST to add another day assuming that release will occur the following day.¹⁴</p>
	<p>If there are any in-store orders or retail order directions they will appear next with the Print Order Detail link.</p> <p>If an order doesn't contain an in store product and was placed in dot-com or by PSS in dot-com this section won't be displayed.</p>
	<p>If there are any Pick Up In Store items, then the next section will show the store information for the store selected for fulfillment from dot-com or for the retail store where the order was placed. This store information will automatically populate the store information shown on this page.</p>
	<p>Customer information entered will be listed to the right of the store information.</p>
	<p>All product documents will be listed under the thumbnail image.</p> <ul style="list-style-type: none"> ▪ In-store products will be shown with the thumbnail images, product description, options selected, SKUs, quantity, and price. ▪ If there are any delivery products in the order the shipping information will be listed, which could be a customer address or the Retail store address that placed the order. There will be billing information which if entered by the end customer will list customer billing information for dot-com orders. If PSS there will be a PSS payment bypass entered here with the zip code used. If this was a retail order it would list the customer information here. All product documents will be listed under the thumbnail image. ▪ Below that will be all the delivery products if any were ordered with the thumbnail images, product description, options selected, SKUs, production days, quantity, and price with any shipping fees if they apply, any taxes if they apply and any coupon/offer discounts if they apply.
	<p>Delivery Status will be display at the very bottom of the order. Status options are: Awaiting Release, In Production, Shipped, or Cancelled. If Cancelled, then the Status will show who cancelled and what the reason for the cancellation was. If the order was automatically cancelled due to a retail delivery or mixed cart order not being released in 30 days, then the Status will indicate Automatically Cancelled 30 Days Past with No Release - by Staples.</p>

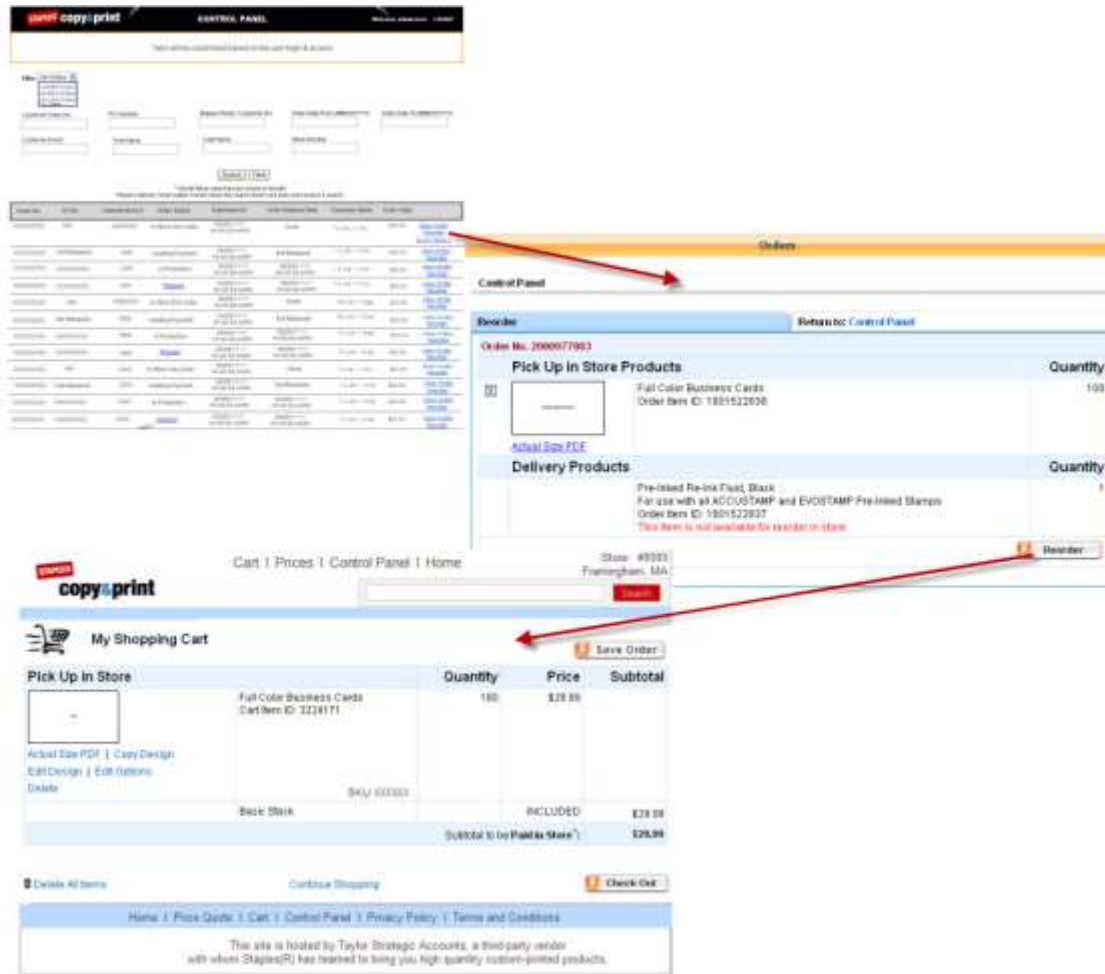
¹⁴ Need clarity on this.

7.2.1.3. Documents

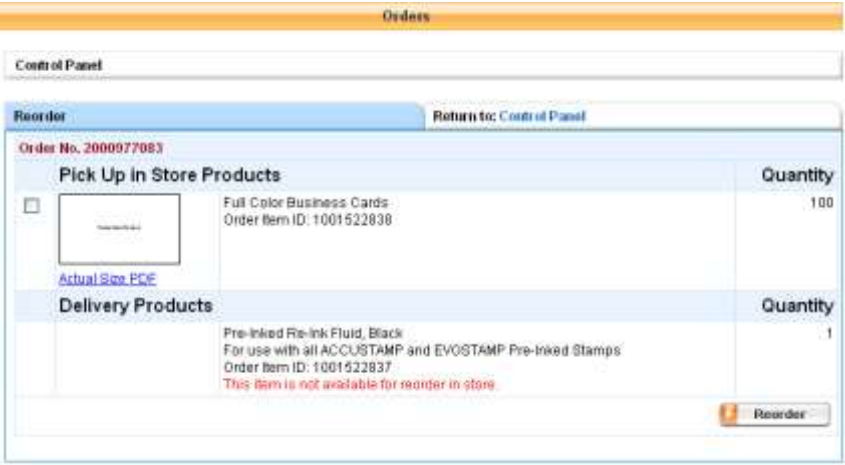
Use Case ID	Description
	<p>Typically for a print item there are three¹⁵ file types:</p> <p>Delivery Items w/ Artwork:</p> <ul style="list-style-type: none">▪ View Customer PDF – this is what the customer would have approved on the Preview Page.▪ Large Preview – this is what would have created the thumbnail.▪ View Press PDF – this is the production file that was generated to production.▪ Recreate New Press PDF – this is not a file, but rather after a period of time we no longer store the files, but have the ability to recreate them on the fly if needed. <p>In Store Items w/ Artwork:</p> <ul style="list-style-type: none">▪ Actual Size PDF – this is what the customer would have approved.▪ Large Preview – this is what would have created the thumbnail.▪ X-up Documents – this is the document the stores use to print the product.

¹⁵ This only shows two types.

7.2.1.4. Control Panel Reorder



Use Case ID	Description
	<p>Every order submitted on any view of the application will be available for reorder from the shared control panel for a period of 2 years.</p> <p>Note: The original order may have been submitted from one view but may be ordered in a new view. For instance, an original order may have been placed in Retail, and the customer may return to home and access through their order history to place a reorder if they have an account and the in store order logged their email to save the order to their account history as well. If this occurs the items will be added to the cart and follow the process as if ordered in the new channel and will be documented as a reorder.</p>
	<p>There will be a Reorder link for all orders listed in the shared Control Panel. Clicking this link will present the Reorder page including Pick Up In Store and Delivery (depending on the order there may be only in-store items, only delivery items, or a mix of both).</p>

Use Case ID	Description
	<p>A check-box will display to the left of the order line for all items that are available for reorder. This check-box will not display for items not available to be reordered (preventing these items from being reordered).</p> <p>There will be a Reorder button to the bottom right of the order list. To reorder, the user clicks the check-box to select an eligible order, and then clicks the Reorder button.</p>  <p>Reasons that the box to reorder may not be available:</p> <ul style="list-style-type: none"> ▪ The item was discontinued. The design used was discontinued. In a case of this a message would present: "This item is no longer available for reorder." ▪ There are some products available in dot-com that won't be available for Stores. An example EVO Stamps won't be able to reorder through the control panel for a store admin login. In this instance a message would need to display, "This item is not available for reorder in store." ▪ There are some products available in Full Stores only that won't be available for Lite Stores or PSS admin login users. An example Div 2 Instant items are not available for reorder in Lite Stores or on dot-com for end users through the Account reorder feature. If a store or a PSS user is accessing an order that contains one of these items a message will be displayed "These products are only available for reorder from the original store."
	<p>If the user hasn't selected any items and clicks Reorder button, an error will display indicating that an item must be selected to reorder.</p>
	<p>The My Shopping Cart page displays when the user clicks the Reorder button. All items selected when the Reorder button is clicked will be added to the cart. The cart page provides the user opportunity to place the order or edit the items in the cart.</p>
	<p>Once the user is satisfied with the items, they click the Check Out button to finalize their order using the payment methods available based on the view of the application.</p> <p>Note: For instance, the payment paths will follow the PSS admin user path if an item is reordered by a PSS user; likewise, the payment paths will follow the retail store path if an item is reordered by a retail store admin user.</p>

Notes

- Ideally reorders need to be tracked, to understand reorder better and determine what percentage of the total are reordered. Jointly Staples and Taylor want to know what percentage of items are reordered without edits and with edits and if possible log what was changed if edits occurred. (Design, Stock, Inks, Quantity, etc.)
- If pricing updates are made, the history will still display the original order price, but if the item is reordered when the items populate the cart they will reflect the updated current pricing.
- See the Reorder Matrix for complete details of what is allowed for Reorder.

7.2.1.5. Submit Redo

The screenshot shows the 'Re-Do Order Form' in the Staples copy&print CONTROL PANEL. The form includes the following fields and options:

- Site Order Number:** XXXXXXXXXXXX (prefilled with site order number.)
- P.O. Number:** XXXXXXXXXXXX (prefilled with Staples released P.O. or Site Order number for Retail.)
- Date:** MM/DD/YYYY (prefilled with the date the original order was submitted)
- Order Channel of Original Order:** Retail/PSS.com
- *Associate Assisting with the Re-Do:** [Text Input]
- *Contact Phone:** [Text Input] ***Contact Email:** [Text Input]
- *Items:** (List all items ordered, the user has to check all items that have an issue.)
 - 1" x 2" Accu Stamp
 - Black Ink
 - Replacement Ink
 - Red Ink
 - 2 Color Business Card
 - Ivory Linen Stock
 - Rolled Print
 - Back Copy
- *Error:** Taylor Staples/Customer
 - Misspelling
 - Wrong Paper
 - Incorrect Quantity
 - Missing Copy/Logo
 - Special Instruction Missed
 - Artwork Issue
 - Wrong Ink Color
 - Typestyle Change
 - Format Change
 - Other
- *Note all corrections:** [Text Area]
- Where to Ship the Reprint:** [Form with fields for Name, Address/Company Name, Address, City, State, Zip, Phone]

Buttons: [Print] [Submit] [Cancel]

Use Case ID	Description
	Only those with access to the Control Panel will be able to submit a redo. If a customer has an issue with an order, they need to get in touch with either a PSS Rep or a Retail Store to begin the process of a redo.
	The redo functionality for any order in the Control Panel is available for only 60 days. The

Use Case ID	Description
	<p>online links to Redo form will not be available after 60 days</p> <p>Note: The redo is available to assist the user when an order hasn't met customer expectation. All problems with an order should be handled in this period. If for some reason an issue comes up that exceeds this timeframe, Staples may work with MCC directly to address any concerns, but online links to Redo form will no longer be available.</p>
	<p>The Submit Redo link is only available after an order has been placed (and within the 60-day period).</p>
	<p>Redo's are not available for in-store produced items. These items may appear in the order history, but a Submit Redo link won't be available.</p>
	<p>Orders can be searched for from the Control Panel. If searching for an order within the 60-day period from it being placed, then the order shown in the Control Panel will include a Submit Redo link available. Clicking this link from the Control Panel will bring up all items ordered with a check box by each Delivery product.</p>
	<p>The Redo Order Form includes the following fields:</p> <ul style="list-style-type: none"> ▪ Site Order Number XXXXXXXX will pre-populate with original order number ▪ P.O. # XXXXXXXXXX will pre-populate with original P.O. Number (Dot-com Staples Released P.O. Number, Retail, P.O. will be the site Order Number.) ▪ Date: MM/DD/YYYY will pre-populate with the original date of the order. ▪ Order Channel: Retail/Dot-com or PSS If this is a retail store, list the store info below. If this is a PSS original order, list the PSS rep that placed the order. If this is a customer placed order in dot-com, list Customer placed order. ▪ *Associate Assisting with the Redo: Store Associate Name or PSS Name ▪ *Contact Phone: In the event Taylor needs to reach the Associate regarding the redo, need the contact information provided. ▪ *Contact Email: In the event Taylor needs to reach the Associate regarding the redo, need a way to contact them. ▪ * Items - List all delivery items that were part of this order with a check box by each. All order options regarding this order will be listed under the main product description to help accurately re-produce this order. Associate should only select the items with issues. ▪ *Error – A radio button choice between Taylor and Staples/Customer This radio button is for the store to choose what they believe to be the issue. <p>Note: MCC will investigate the error. If the error is found to be a Staples error, Taylor will charge. If the error is found to be a Taylor error the redo will be done free of charge.</p> <p>*Indicates Required</p>
	<p>Check-boxes for Errors include</p> <ul style="list-style-type: none"> ▪ Misspelling ▪ Wrong Paper ▪ Incorrect Quantity ▪ Missing Copy/Logo ▪ Special Instructions Missed ▪ Artwork Issue ▪ Wrong Ink Color ▪ Typestyle Change ▪ Format Change

Use Case ID	Description
	<ul style="list-style-type: none"> ▪ Other
	<p>Other possible errors are:</p> <ul style="list-style-type: none"> ▪ Order Didn't Arrive ▪ Wrong Stock ▪ Product Quality ▪ Bleeds ▪ Product Damaged ▪ Text Cut Off
	<p>At the bottom of the page there will be three buttons:</p> <ul style="list-style-type: none"> ▪ Print Will allow the store or PSS rep the ability to print a copy of this page for their records ▪ Submit Will direct an email with the redo information to MCC for investigation, billing and editing if required. Email will be sent to the Quality Control Desk MW, address: qualitycontroldeskMW@cccallscenterDot-com. ▪ Cancel Returns the user to the Control Panel order search
	<p>After a redo has been submitted, the redo link will remain available in the Control Panel for that order for the remainder of the 60-day period of the original order.</p> <p>Note: This allows for a redo of another item on the order or if a multiple redo.</p>
	<p>To prevent the user from submitting multiple redo requests, the Submit button will not be available on the Redo Order Form after the user has clicked the button and submitted the form.</p>
	<p>The order Status will be updated to Redo Submitted after a redo has been submitted. This status will remain,¹⁶ unless it's updated with an additional Redo Submitted status, which would just log the new date of the status.</p>

Notes

- For all corrections, free text entry field for the associate to indicate any specifics related to the issues encountered.
- Since it's possible a redo might be generated from a different channel than the original order was placed, it's also possible that the customer may want their order shipped to a different location, so need to collect where the re-print should be directed.
- Note all redo's will be handled manually on the backend. Since this is the case there will be no front end tracking of redo's. All reporting regarding redo's will need to be generated from the backend which is what occurs today and is working well.
- If the redo is the result of a customer error a new order can be placed in order to correctly charge the customer and log the order. If the store/PSS is going to take responsibility for the

¹⁶ For how long?

error, they can submit the redo and Taylor will charge Staples, but Staples may choose not to charge the end customer, this is their decision.

7.2.2. Reports

Use Case ID	Description
	<p>The Reports page will be available to users who have access to the Report tab on the Control Panel. The Reports page will provide a drop-down to select the following reports:</p> <ul style="list-style-type: none"> ▪ Sales Report ▪ Top Designs ▪ Reorders Report ▪ BCIM Billing Report ▪ Customer Query Report – For Staples Surveys dot-com/PSS Customers ▪ Customer Query Report – For Staples Surveys Retail Customers: ▪ Matching Report ▪ Unreleased Order Report ▪ Cancelled Order Report

7.2.2.1. Sales Report

Use Case ID	Description
	<p>The Sales Report provides the user with two date fields: Date From (MM/DD/YYYY) and Date To (MM/DD/YYYY).</p>
	<p>The Sales Report provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.</p>
	<p>If the date fields are not completed or don't contain searchable dates the application will present red text errors "Please correct the information below." By each field with an issue "Please enter a valid Date."</p>

Use Case ID	Description
	<p>The Sales Report will provide a tab or option that allows the user to search for sales data for a specified time period (similar to the daily reporting currently on FCP) allowing the user search by the following criteria:</p> <ul style="list-style-type: none"> ▪ Dot-com generated - Delivery Only Item/Sales – Pick-up In Store Only Item/Sales – Mixed Cart Item/Sales, by Product Category over a given period of time. ▪ Dot-com PSS generated – Delivery Only Item/Sales – Pick-up In Store Only Item/Sales – Mixed Cart Item/Sales by Product Category over a given period of time. ▪ Retail generated – Delivery Only Item/Sales – Pick-up In Store Only Item Sales – Mixed Cart Item/Sales by Product Category over a given period of time. <p>Note: See sample report that mimics the report Taylor provides today, but accounts for knowing more specific channel information.</p> <p>See Sample 2.0 Daily Report. If possible it would be nice if this could be presented in the application rather than having to email daily. Knowing this report will only reflect what has occurred on line, so will not necessarily match up with what has occurred on the backend as credits are not issued on the site, some orders may be cancelled, etc.¹⁷</p>

7.2.2.2. Top Designs Report

Use Case ID	Description
	The Top Designs Report provides the user with two date fields: Date From (MM/DD/YYYY) and Date To (MM/DD/YYYY).
	If the date fields are not completed or don't contain searchable dates the application will present red text errors "Please correct the information below." By each field with an issue "Please enter a valid Date."
	The Top Designs Report provides the user with a drop-down list allowing the option of specifying how many top designs they want to look at 25, 50, 100 or 500.
	The Top Designs Report will list the top designs that have been used for all products. It will rank the designs and list the released sales and orders that have contained these designs. The report will also show the Average Order Value (AOV).
	The Top Designs Report allows the user to drill into each design to view all the products where the design is available, the total sales for the products, and the orders of the products made up the totals.
	The Top Designs Report also allows the user to collapse the expanded products.
	The Top Designs Report should be made available directly off the Control Panel so that appropriate users can view it on the fly and without extra clicks.

¹⁷ This is hard to understand; needs revision to be clear.

7.2.2.3. Reorders Report

Use Case ID	Description
	The Reorders Report provides the user with two date fields: Date From (MM/DD/YYYY) and Date To (MM/DD/YYYY).
	The Reorders Report provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.
	The Reorders Report will present data like the Stamp Reorder Report.
	If the date fields are not completed or don't contain searchable dates the application will present red text errors "Please correct the information below." By each field with an issue "Please enter a valid Date."
	The Reorders Report will be available off of either the Control Panel, My Account, or both.
	The Reorders Report provides information on how many orders were generated from the reorder process through the Control Panel and/or via the My Account feature. ¹⁸

7.2.2.4. BCIM Billing Report

This **BCIM Billing Report** is used to bill Staples for the generation of the file for instant in store produced items.

Use Case ID	Description
	The BCIM Billing Report will provide information on in-store item sales generated over a given period of time to bill Staples.
	The BCIM Billing Report must provide a link to export to Excel to make it easier for accounting to transfer the data into a billing file.
	The Reorders Report provides the user with two date fields: Date From (MM/DD/YYYY) and Date To (MM/DD/YYYY).
	The Reorders Report provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.
	If the date fields are not completed or don't contain searchable dates the application will present red text errors "Please correct the information below." By each field with an issue "Please enter a valid Date."
	Search results display within the following layout: <ul style="list-style-type: none"> ▪ Store Number, Date, Order ID, SKU, Quantity and Charge will be available column headings.
	Store Number will display the code of the store where the in-store production of the items took place (i.e. doesn't matter if it was placed in dot-com, by PSS, or through Retail).
	The Date field displays the date the item was ordered.

¹⁸ This statement from the original PRD does not make sense and needs to be rewritten if it is to be useful: "If possible would like to have the reporting know if the customer ordered without any changes, meaning the customer selected to "Edit Options" or "Edit Design". Would like to understand the percentages of overall orders that were re-orders over a given period of time."

Use Case ID	Description
	The Order ID is the complete order number Note: Since these are reported by item, you may see the same order number more than once.
	SKU is the Staples SKU of the in-store item that was ordered.
	Quantity will always be 1 (because reporting is by individual item).
	Charge will be \$1.35 (staying as it has been) until a price change is made effective. When a price change becomes effective, the Charge field will display the price adjusted to the show the change. Note: In which case we need a way to make a price adjustment to this charge, so that it is effective on a specific date. ¹⁹
	When the report is generated it will list all orders placed to store 1 1 st and create a subtotal for the quantity and price then will report the same for all other remaining stores that had In Store orders. At the very bottom there will be a Grand Total of all stores for the quantity and price.
	All in-store items must populate this report immediately when an order is placed.
	In-store items can't be cancelled or deleted, so if delivery of a Mixed Cart order is cancelled, the in-store items from that order must continue to populate this report.

7.2.2.5. Customer Query Report – For Staples Surveys dot-com/PSS Customers

Use Case ID	Description
	The Customer Query Report – For Staple Surveys dot-com/PSS Customers will only include dot-com customers (delivery, in-store and mixed)
	The Customer Query Report – For Staple Surveys dot-com/PSS Customers provides the user with two date fields: Date From (MM/DD/YYYY) and Date To (MM/DD/YYYY).
	This Customer Query Report – For Staple Surveys dot-com/PSS Customers provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.
	If the date fields are not completed or don't contain searchable dates the application will present red text errors "Please correct the information below." By each field with an issue "Please enter a valid Date."

¹⁹ Clarify

Use Case ID	Description
	<p>For dot-com and PSS customers, the search results of the Customer Query Report – For Staples Surveys dot-com/PSS Customers will display information in the following columns:</p> <ul style="list-style-type: none"> ▪ Site Order Number ▪ Staples P.O. Number ▪ Shipping First Name ▪ Shipping Last Name ▪ Billing First Name ▪ Billing Last Name ▪ Email Address
	This report must be able to be exported to Excel.

7.2.2.6. Customer Query Report – For Staples Surveys Retail Customers:

Use Case ID	Description
	The Customer Query Report – For Staple Surveys Retail Customers will only include retail customers (Delivery, In Store and Mixed).
	The Customer Query Report – For Staple Surveys Retail Customers provides the user with two date fields: Date From (MM/DD/YYYY) and Date To (MM/DD/YYYY).
	The Customer Query Report – For Staple Surveys Retail Customers provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.
	If the date fields are not completed or don't contain searchable dates the application will present red text errors "Please correct the information below." By each field with an issue "Please enter a valid Date."
	<p>Retail Customers query will need to present information with the following columns:</p> <ul style="list-style-type: none"> ▪ Site Order Number ▪ Customer First Name ▪ Customer Last Name ▪ Email Address
	This report must be able to be exported to Excel.

7.2.2.7. Matching Report

The Matching Report is used in determining how many sales are being generated from the matching feature. The report will be added to the Control Panel drop-down.

Use Case ID	Description
	The report provides the user with two date fields: Date From (MM/DD/YYYY) and Date To (MM/DD/YYYY).
	The report provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.

Use Case ID	Description
	The site will flag all orders that contain items that were added from the matched page. The report looks at orders from the matched page and identifies those items and sales from within these orders were generated from the original items and which were added from the matching feature of this report. Note: This will give visibility to the effectiveness of this page.
	The report will calculate percentages these numbers are of total orders and sales (See Sample Matched Report).

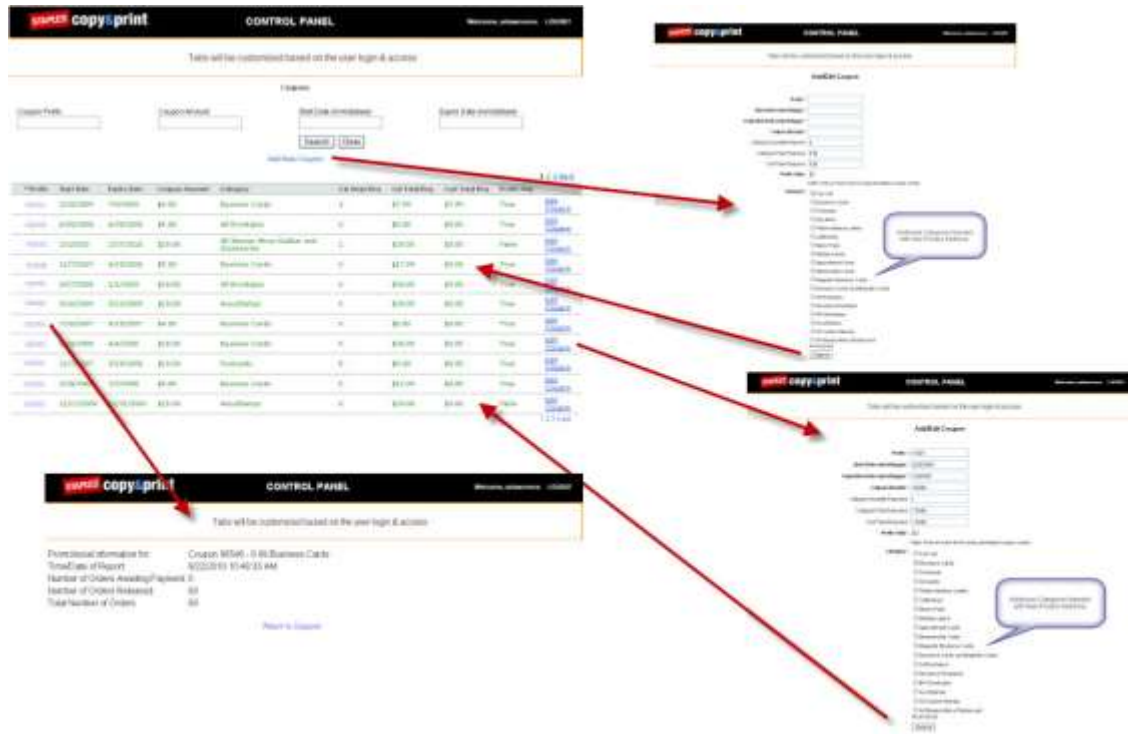
7.2.2.8. Unreleased Order Report

Use Case ID	Description
	The Unreleased Order Report provides fields and criteria to allow a user to search for orders entered into FCP 2.0.
	The Unreleased Order Report provides fields and criteria to allow a user to search for orders that are outstanding.
	The Unreleased Order Report provides fields and criteria to allow a user to search for orders that have been released to production.

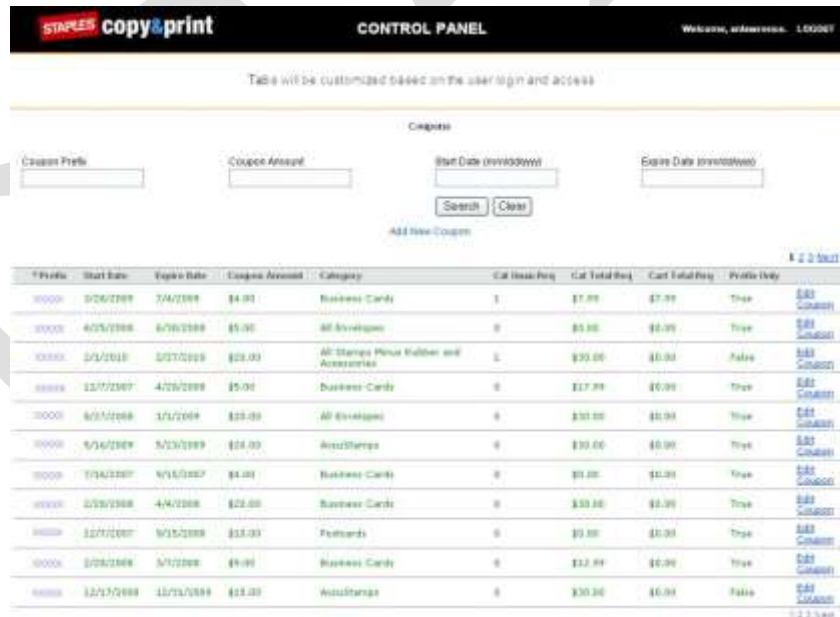
7.2.2.9. Cancelled Order Report

Use Case ID	Description
	The Cancelled Order Report provides fields and criteria to allow a user to search for orders entered into FCP 2.0.
	The Cancelled Order Report provides fields and criteria to allow a user to search for orders that have been placed.
	The Cancelled Order Report provides fields and criteria to allow a user to search for orders that have a Cancelled status..
	This report must be able to be exported to Excel.
	Because retail orders are automatically cancelled if they are not approved within 7 days (regardless of the date entered) the data on the Cancelled Order report will only go back 7 days.
	Orders not released from the Retail Stores after 7 days will go into a Cancelled Status.
	All Cancelled orders will be viewable in the Control Panel for 30 days and will be available to be reordered if desired for 30 days. After 30 days these particular cancelled orders may be purged from the system.

7.2.3. Dot-com Coupons



7.2.3.1. Coupon Page



Use Case ID	Description
	The Coupon page provides Staples & Taylor managers a tool in the Control Panel that allows them to create and manage dot-com coupons.
	The Coupon page will only be accessible to Staples & Taylor managers.

Use Case ID	Description
	Coupons will only be available to the dot-com site and PSS reps using the dot-com site. Coupons entered at Retail take place on the POS system.
	Two types of coupons will be shown on the Coupons page: General Prefix Coupons and Serialized Coupons.
	Both General Prefix Coupons and Serialized Coupons require an entry to be made in the Control Panel for them to work. ²⁰
	Serialized coupons will require additional work by a developer to enter these, so that once a serialized code is used in a cart it can't be used again. ²¹
	There will be a tab in the Control Panel that is only available to Staples and Taylor Managers to add and maintain coupon information.
	This page will list all coupons that have been created, there are search fields available to help locate the coupon desired:
	Coupons can be searched using the following fields that display at the top of the page: <ul style="list-style-type: none"> ▪ Coupon Prefix ▪ Coupon Amount ▪ Start Date (MM/DD/YYYY) ▪ Expire Date (MM/DD/YYYY)
	The report provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.
	Clicking the Add New Coupon link will open the Coupon Add/Edit page where the Staples or Taylor manager can add new coupons.
	The Coupons entered will appear next with the following column headings: <ul style="list-style-type: none"> ▪ Prefix – The prefix is the general 5 digit coupon code or the first 5 digits of a serialized group of coupons. There will be an ascending and descending sort. All codes will become links to view real time results of the coupon redemptions. ▪ Start Date – The date the Coupon is active. ▪ Expire Date – The date the Coupon expires. ▪ Coupon Amount – The total discount offered with the coupon. ▪ Category – The product category that the offer is available to. ▪ Cat. Quantity Req. – Are there any category product quantities required to receive the offer. ▪ Cat. Total Req. – Is there a total category charge required to receive the offer. ▪ Cart Total Req. – Is there a total cart charge required to receive the offer. ▪ Prefix Only – True indicates this is a general coupon code. False indicates this was a serialized coupon. ▪ Edit Coupon Link – brings up the Add/Edit page with the specific coupons information prefilled.

²⁰ Provide clarification.

²¹ Is this supposed to say something along the lines of, "Serialized coupons have codes that can only be used once?"

7.2.3.2. Add New Coupon/Edit Coupon

STAPLES copy&print CONTROL PANEL Welcome, username: J.DONET

Tabs will be customized based on the user login & access.

Add/Edit Coupon

Coupon Description:

Prefix:

Start Date (mm/dd/yyyy):

Expiration Date (mm/dd/yyyy):

Coupon Amount:

Category Quantity Required:

Category Total Required:

Cat Total Required:

Prefix Only:

Note: Only an checkbox if using serialized coupon codes.

SKU Order Applies To:

Category:

- Full Cat
- Business Cards
- Postcards
- All Labels
- Return Address Labels
- Letterhead
- Memo Pads
- Mailing Labels
- Appointment Cards
- Membership Cards
- Magnetic Business Cards
- Business Cards and Magnetic Cards
- All Envelopes
- Business Envelopes
- All Stickers
- AcadStamps
- All Custom Stamps
- All Stamps Minus Rubber and Accessories

Submit

Additional Categories Needed with New Product Additions

22

²² The Edit Coupon page is essentially the same with the only difference being that when editing the specific coupon accessed will have all the information prefilled.

Use Case ID	Description
	<p>The Coupon Add/Edit page has several fields and information required to add/edit a coupon:</p> <ul style="list-style-type: none"> ▪ Coupon Description*: Short Description of the Promo ▪ Prefix*: 5 digit coupon code or 1st 5 digits of a serialized coupon offer. ▪ Start Date (MM/DD/YYYY)*: Date the promo is active. ▪ Expiration Date (MM/DD/YYYY)*: Date the promo stops. ▪ Coupon Amount*: Amount the offer will discount the order. ▪ Category Quantity Required: Only list if you want to limit the coupon based on requiring multiple products purchased from the same category. ▪ Category Total Required: Only list if you want to limit the coupon based on the total in the cart off the offer category. ▪ Cart Total Required: Only list if you want to limit the coupon based on the total cart value. ▪ Prefix Only*: with a check box that is defaulted to being checked. With a note below, "Note: Only un-check box if using serialized coupon codes." ▪ SKUS Offer Applies to: Open field that allows the user to enter specific SKU's that the offer applies to. Could be one or several SKUs. ▪ Category*: List all categories with the option to select. Product Categories will need to be decided based on the product being added to the application for this release. <p>*Indicates Required</p>
	A new coupon can be entered for either SKU or a category, but not both. If the user tries to enter a coupon for both, an error will present that indicates either a category or SKU's need to be entered.
	If SKU's are entered, a check that the SKUs are valid will need to take place before the coupon is created. Should a SKU that is not available be entered an error would present that indicates which SKU is not found.
	A Submit button displays at the bottom of the page, which, when clicked, will create or update any changes made.

7.2.3.3. Coupon Monitor



Use Case ID	Description
	Each coupon prefix will link to a page that will display the results of the coupon.

Use Case ID	Description
	<p>The page will show the following information:</p> <ul style="list-style-type: none"> Promotional information for: Coupon Code XXXXX – Coupon Description Time/Date of Report: Log the date & time this page was accessed, knowing results will be reported up to this time & date. Number of Orders Awaiting Payment: XX (List the number of orders that were placed with the coupon that haven't been released into production.) Number of Orders Released: XXX (List the number of orders that were placed with the coupon that have been released to production.) Total Number of Orders: Total of Released and Unreleased orders that contained this coupon offer.
	There will be a link at the bottom of this page to return to Coupons page.

7.2.4. Release Orders

The screenshots illustrate the 'Release Orders' process in the Staples copy&print CONTROL PANEL. The interface includes search and filter options, a table of orders, and a modal for deleting orders.

Order Date	Order ID	Order Status	Order Total	Order Release
3/22/2010 1:04 PM	200090998	None	\$36.30	Enter PO / Delete
3/22/2010 1:52 PM	200090998	None	\$49.36	Enter PO / Delete
3/22/2010 1:49 PM	200090998	None	\$43.27	Enter PO / Delete
3/22/2010 1:47 PM	200090984	None	\$118.96	Enter PO / Delete
3/22/2010 1:44 PM	200090984	None	\$47.80	Enter PO / Delete
3/22/2010 1:43 PM	200090989	None	\$36.30	Enter PO / Delete
3/22/2010 1:42 PM	200090987	None	\$43.40	Enter PO / Delete
3/22/2010 1:42 PM	200090979	None	\$96.61	Enter PO / Delete
3/22/2010 1:41 PM	200090844	None	\$54.29	Enter PO / Delete
3/22/2010 1:37 PM	200090844	None	\$36.21	Enter PO / Delete

Delete Order - #200090997

Order ID: 200090997
Order Status: Waiting for Payment Authorization
Order Date: 3/22/2010 4:10:12 PM
Rewards / Customer No. / Name: XXX-XXX-XXXX
Customer Name: XXX-XXX-XXXX
Phone: XXX-XXX-XXXX
Order Total: \$124.91
Admin Name: Melissa Lawrence
Phone: [input field]
[Delete] [Cancel]
[Return to Released Orders Page](#)

Use Case ID	Description
	The Released Orders page/function provides Staples Kana Team, Staples managers, and Taylor managers a tool in the Control Panel through which to look at dot-com placed end-customer orders that are awaiting payment approval to submit into production.
	The Released Orders page/function will only be accessible to Staples Kana Team, Staples managers, and Taylor managers

Use Case ID	Description
	<p>Only dot-com orders requiring payment authorization by Staples Kana should appear in this queue. Once an order is deleted or released it would no longer appear in this list.</p> <p>Note: Retail has a separate release process, and PSS orders are released to production at checkout with a P.O. Number.</p>

7.2.4.1. Search Orders

STAPLES copy&print CONTROL PANEL

Welcome, admin@staples.com 1/20/2017

Tables will be customized based on the user login & access:

Hold and Release

Name: Order ID: Email: Order Date From: 1/18/2016

Zip Code: Phone: Staples Rewards / Customer No.: Order Date to: 1/23/2016

*Not all fields searched are shown in results.

Order Time	Order ID	Order / Est No.	Name	Phone	Total		
1/22/2016 3:54 PM	200090716	None	Last Name, First Name	XXX-XXX-XXXX	\$28.26	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:52 PM	200090690	None	Last Name, First Name	XXX-XXX-XXXX	\$42.35	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:49 PM	200090681	3947573324	Last Name, First Name	XXX-XXX-XXXX	\$41.27	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:47 PM	200090684	2993482495	Last Name, First Name	XXX-XXX-XXXX	\$28.94	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:44 PM	200090685	512736437	Last Name, First Name	XXX-XXX-XXXX	\$47.80	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:43 PM	200090680	None	Last Name, First Name	XXX-XXX-XXXX	\$26.36	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:43 PM	200090677	None	Last Name, First Name	XXX-XXX-XXXX	\$42.40	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:42 PM	200090678	None	Last Name, First Name	XXX-XXX-XXXX	\$56.41	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:41 PM	200090644	138740	Last Name, First Name	XXX-XXX-XXXX	\$34.29	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>
1/22/2016 3:37 PM	200090686	None	Last Name, First Name	XXX-XXX-XXXX	\$28.21	<input type="button" value="Enter PO"/>	<input type="button" value="Delete"/>

Use Case ID	Description
	<p>The Search Orders page will display with the Order Date From and Order Date To prefilled to the rolling dates of the current 7-day period (Order Date From will be six days prior to the current day; the Order Date To will be the current date.).</p>
	<p>Other search fields:</p> <ul style="list-style-type: none"> Name: Order ID: Zip Code: Phone: Email: Staples Rewards/Customer No.
	<p>The report provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.</p>

Use Case ID	Description
	<p>The search results will display beneath the search fields in the following columns:</p> <ul style="list-style-type: none"> ▪ Order Time Date & Time the order was placed. This column has the ability to order the query in ascending or descending order. ▪ Order ID Site Order Number ▪ Rwds/Cus No Staples Rewards/Customer No, if entered during the checkout process. ▪ Name Customer Last Name, First Name ▪ Phone Phone number entered by the Customer at check out. ▪ Total Total of the sale in Retail dollars.
	An Enter PO button displays on each order line. Clicking the Enter PO button will reload the page and release the order that was in the line.
	Clicking the Delete button will remove the order from the system. Deleting an order is only used if Staples Kana team determined the order to be dead and that payment wouldn't be collected.
	There will be links allowing the customer will have the ability to page quickly through orders using Previous , Next , and directly through links to numbered pages for quick access to the current page in view.
	There will not be a Next link if the user/customer is on the last page of their order history. There will not be a Previous link if the user/customer is on the first page of their order history.

7.2.4.2. Hold and Release

Use Case ID	Description
	The Hold and Release page will display with the Order Date From and Order Date To prefilled to the rolling dates of the current 7-day period (Order Date From will be six days prior to the current day; the Order Date To will be the current date.).

Use Case ID	Description
	Other search fields: <ul style="list-style-type: none"> Name: Order ID: Zip Code: Phone: Email: Staples Rewards/Customer No.
	The report provides the user with two buttons: Search to conduct the search; Clear to clear the data entered so as to start over.
	If a Kana user selects Enter P.O. for a specific order the page will re-load with only that particular order displayed. ²³ All the same columns from the first page will still be displayed, Order Time, Order ID, Rwd/Cust No, Name Phone and Total.
	An Enter PO Number field will display to the right in the search results table. Entering a PO and clicking the Release button will approve the order and pass it to production. The user will then be returned the main order queue.
	Clicking the Cancel button will neither release nor delete the order, but just return the user to the original page of orders awaiting release.

7.2.4.3. Delete Page

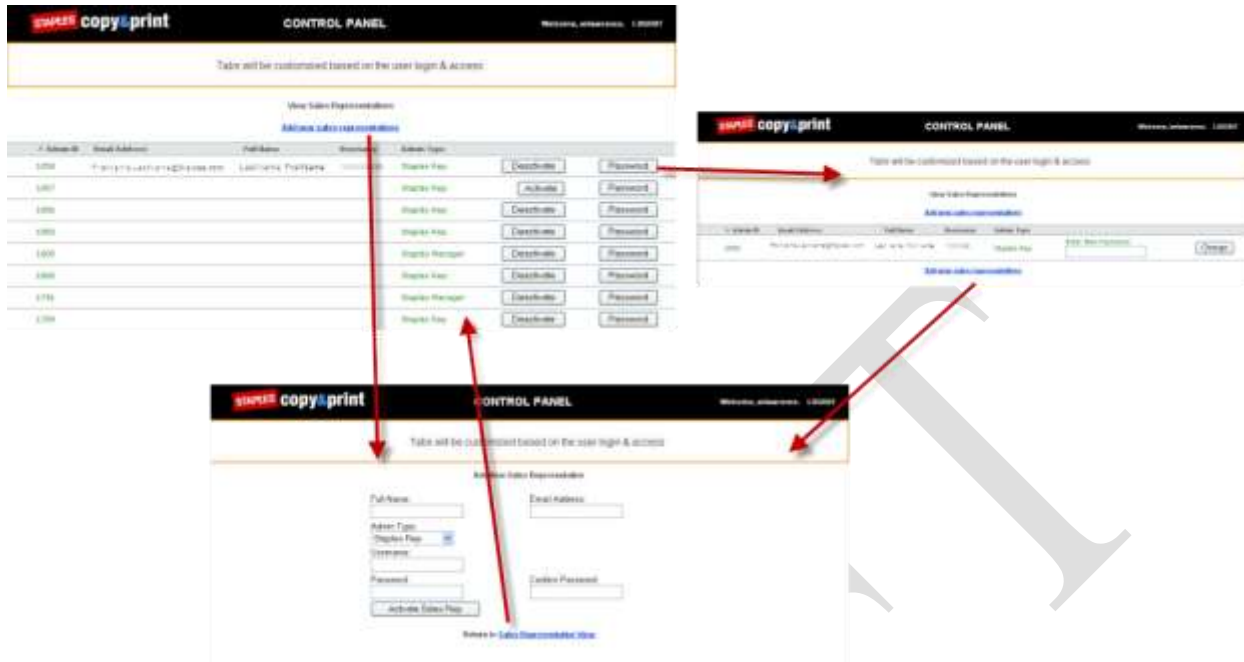


Use Case ID	Description
	This page will be used if Kana has determined that payment won't be collected to release this order. If the Delete button is selected, the page will present with the ability to delete the order.

²³ What field are we talking about here: Order ID or Enter PO?

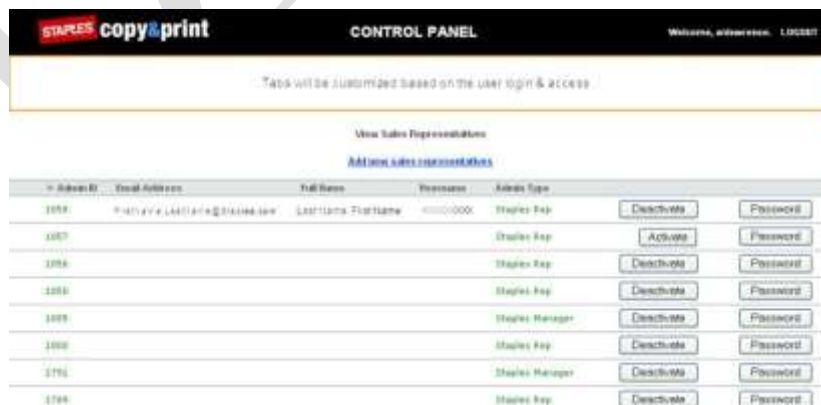
Use Case ID	Description
	<p>This page will include the following fields:</p> <ul style="list-style-type: none"> ▪ Delete Order - #XXXXXXXXXX ▪ Order ID: XXXXXXXXXXXX ▪ Order Status: Waiting for Payment Authorization ▪ Order Time: MM/DD/YYYY HH.MM.SS AM/PM ▪ Rewards/Customer No.: None or XXXXXXXXXXXX ▪ Customer Name: Last Name, First Name ▪ Phone: XXX-XXX-XXXX ▪ Order Total: \$XX.XX ▪ Admin Name: Kana Users ▪ * Reason: (text field) <p>*Indicates Required:</p>
	<p>Below the reason text entry field will be two buttons Delete and Cancel. If delete is selected the order will be deleted and return the user to the main queue. If the user selects cancel the order will not be deleted and will remain in the queue and return the user to the main queue.</p>
	<p>There is also a link at the bottom of the page to Return to Release Orders Page.</p>
	<p>If a reason is not provided and the user tries to delete, an error message will occur indicating the required field must be completed.</p>
	<p>If an order is deleted prior to payment approval, the desire is to still see the order in the main order history and see who deleted and the given reason. The only reason an order should be deleted from this page is if payment approval is not possible.</p>
	<p>If an order is released, outline process to void/cancel production/shipping if necessary if the order hasn't progressed too far into production or shipping.</p>

7.2.5. Retail Order Monitor



Use Case ID	Description
	The retail order monitoring pages must be able to query orders that have been placed by not released over a given period.
	The retail order monitoring pages must be able to query that have been released over a given period to production.
	The retail order monitoring pages must be able to query that were cancelled in the Retail Channel due to no payment.
	The retail order monitoring pages must provide a drop-down that allows look-up of Retail Unreleased Orders or Released Orders .

7.2.5.1. View Sales Representatives



Use Case ID	Description
	There will be an Add New Sales Representatives link at the top of the page. Clicking this link will bring the user to a page where a new representative can be added.
	There will be columns with the following headings: <ul style="list-style-type: none"> ▪ Admin ID this is the number the system creates for PSS users. There will be an arrow that allows the user to sort either ascending or descending. ▪ Email Address This will be the staples representatives email address. ▪ Full Name Last Name, First Name ▪ Username The user name provided when adding a rep. ▪ Admin Type This can either be Staples Rep or Staples Manager
	Once added, reps will be active by default and will display in the list shown on this page.
	For active reps, there will be a Deactivate button that will make the rep inactive but won't delete them from the list.
	For deactivated reps, there will be an Activate button.
	For each user there will also be a Password button that if clicked will allow a Staples manager to reset a user with an updated password.

7.2.5.2. Add New Sales Representatives

The screenshot shows a web interface titled 'STAPLES copy.print CONTROL PANEL'. Below the header, a message states 'Tabs will be customized based on the user login & access.' The main content area is titled 'Add New Sales Representative' and contains a form with the following fields: 'Full Name', 'Email Address', 'Admin Type' (with 'Staples Rep' selected in a dropdown), 'Username', 'Password', and 'Confirm Password'. At the bottom of the form is an 'Activate Sales Rep' button and a link that says 'Return to Sales Representative View'.

Use Case ID	Description
	This tab will only be available to Staples Managers/Taylor Managers.
	This page allows the Staples PSS group the ability to add/drop PSS reps as they add or lose people from the team.

Use Case ID	Description
	The page requires entry of the following fields: <ul style="list-style-type: none"> ▪ Full Name: ▪ Email Address: ▪ Admin Type: Staples Rep or Staples Manager ▪ Username: ▪ Password: ▪ Confirm Password: ▪ Button to "Activate Sales Rep"
	If something is not completed a red error will occur and indicate, "Please complete required information." There will be a specific note near each field where information is needed.
	There will be a Staples Representative View link, which if clicked will return the user to the View Sales Representatives page.

7.2.5.3. Change Password



Use Case ID	Description
	There will be an Add New Sales Representative link at the top and bottom of the Change Password page. Clicking these links will return the customer to the Add New Sales Representative page.
	The page provides information in the following fields: <ul style="list-style-type: none"> ▪ Full Name: ▪ Email Address: ▪ Admin Type: Staples Rep or Staples Manager ▪ Username: ▪ Password: ▪ Confirm Password: Button to "Activate Sales Rep"
	There will be an Enter a New Password field and a Change button. The user enters their new password in the Enter a New Password field and clicks the Change button to confirm the password change.
	After changing their password, the user will be required to use the new password to login.

7.2.6. Customer Information

Use Case ID	Description
	This tool will only be available for Taylor Managers and MCC to assist with customer issues.
	Every time an order is placed if the customer isn't already logged in. If they didn't create the account themselves when they return they can get their password emailed to them if desired.
	All orders are logged by the email address and that will determine if they are logged to an account.
	There will be a page where customer data is maintained. If the customer didn't create their account the account won't be saved with any other details other than an email and a history of orders placed with this email.
	Should this customer attempt to create an account after they have placed orders on the site, the site will let them know that there is already an account for this address and they can request a password be sent to them. This would then give them access to any earlier orders or anything placed with this email address or while logged into their account. ²⁴
	<p>Search Fields:</p> <ul style="list-style-type: none"> ▪ Customer ID: Site assigned customer number ▪ Email Address: Customers email address when completing an order or creating an account. ▪ First Name: Customers Name when creating an account. ▪ Last Name: Customers Name when creating an account. ▪ Organization: Company listed when creating an account. ▪ Zip Code: Zip Code when creating an account. ▪ Phone Number: Phone Number when creating an account. <p>With buttons Search to conduct the query and clear to clear any entries made to the fields.</p>
	<p>Column Headings for query results:</p> <ul style="list-style-type: none"> ▪ Edit: Link to edit the customers email address ▪ Customer ID: Site assigned customer number with the ability to sort in ascending or descending order. ▪ Email: Customers email address when completing an order or creating an account. ▪ First Name: Customers Name when creating an account. ▪ Last Name: Customers Name when creating an account. ▪ Organization: Company listed when creating an account. ▪ Zip Code: Zip Code when creating an account. ▪ Phone Number: Phone Number when creating an account.
	There will be links allowing the customer will have the ability to page quickly through orders using Previous , Next , and directly through links to numbered pages for quick access to the current page in view.
	There will not be a Next link if the user/customer is on the last page of their order history. There will not be a Previous link if the user/customer is on the first page of their order history.

²⁴ This doesn't make much sense. Needs clarification.

Use Case ID	Description
	If Edit is selected it allows the user to change the email address of the account, should the customer change emails.
	There will be Update and Cancel buttons for either apply a change or canceling the email without making any changes.
	Changing an email address will keep this customers order history intact under the new email address. If the email address changes the previous password will still work.

7.2.7. Quotes

The screenshot shows the 'Quote Form' interface. At the top, it says 'STAPLES copy&print CONTROL PANEL'. Below that, it indicates 'Tabs will be customized based on user login & access'. The form itself is titled 'Quote Form' and contains several input fields: 'Date' (prepopulated with the current date), 'Store Number & Location or PSS', 'Associate', 'Phone', 'Fax', 'PRODUCT INFO:' (with sub-fields for 'Enter Product Quantity', 'Enter Product Quantity', 'Stock Description', 'Ink Specifications', 'Special Processes', and 'Finished Size'), 'Special Instructions/Details', and 'Artwork Description'. At the bottom, there is an 'Artwork File Upload' section with a 'Browse' button, an 'Upload' button, and a 'Submit' button. A progress bar shows 'File Uploaded Successfully: Alexia Lawrence Totah: Delicate.PDF'.

Use Case ID	Description
	The Quotes page provides editable fields that a PSS rep or store can complete to submit a quote request to MCC.
	Once this form is complete it will be submitted to MCC via email to Quotes@ccallcenterDot-com
	When the Quote page is accessed the Date Field will prepopulate with current day's date.

Use Case ID	Description
	<p>Free text entry fields include:</p> <ul style="list-style-type: none"> ▪ Store Number & Location or PSS: ▪ Associate: ▪ Phone: ▪ Fax: ▪ PRODUCT INFO – ▪ Enter Product Quoting: ▪ Enter Product Quantity: ▪ Stock Description: ▪ Ink Specifications: “List any standard ink colors or specific PMS inks.” ▪ Special Processes: List any special processes like bleeds, registration, page with the %, Reverse, Blind Embossing, Foil Embossing, Foil Stamping, etc.” ▪ Finished Size: ▪ Special Instructions/Details: ▪ Artwork Description: “List any special notes about the artwork like Stock Logos, if art is Press Ready, if Design Assistance is needed, if a Die will be provided, etc. You can upload an electronic file of the artwork if one is available.”
	<p>The Artwork File Upload section provides functionality to upload files and attach to the quote request email (this might be helpful in the quoting process).</p>
	<p>The Artwork File Upload section includes four buttons:</p> <ul style="list-style-type: none"> ▪ Browse Allows the user to search within accessible directories for a file to attach ▪ Upload Uploads a file and attaches it to the email ▪ Delete Deletes the upload portion of the email and removes any attachments from the message ▪ Submit Will submit the email to MCC

7.2.8. Associate Tools

Use Case ID	Description
	<p>For the dot-com & Retail (both will have access to the same documents), the Associate Tools provides documents via a tab in the Control Panel.</p>
	<p>Clicking the Associate Tools tab will produce a page loaded with links that provide access to program reference documents.</p> <p>Note: Documents change and require documents be pushed up links added/removed etc. File types include Word Docs, Excel Docs, PDF's, Links to Back-End generated Status/Credit Reports per login, etc.</p>

7.2.8.1. General Resources

Use Case ID	Description
	The General Resources will include the 2.0 Connection Newsletter (PDFs produced monthly providing helpful hints and information about upcoming promotions, etc.).
	The General Resources will provide a historical record of ONLY 12 months of the 2.0 Connection Newsletter on the site at a time.
	Auto Release Process Guide – Determine if this is going to be the same or if updates are needed. This will be completed during the design/content phase which is not dependent on PRD approval.
	Quote Procedure Guide - Determine if this is going to be the same or if updates are needed. This will be completed during the design/content phase which is not dependent on PRD approval.
	MCC Resolution Guide – This will likely require some minor edits since we will now be assisting both PSS and Stores through the same application. This will be completed during the design/content phase which is not dependent on PRD approval.²⁵

7.2.8.2. Manual Backup Forms

Use Case ID	Description
	<p>PDF's for the following forms can be pulled from e-Print, but need to be reviewed to allow the ordering of any new products or check for changes. This will be completed during the design/content phase which is not dependent on PRD approval.²⁶</p> <ul style="list-style-type: none"> ▪ Quote Form ▪ Redo Form ▪ Order Form 1 – Stationary Products (Business Cards, Letterhead, Stationery Envelopes, Business Envelopes, Business Forms, Full Color Postcards) ▪ Order Form 2 – Stationery Products (Folders, Post-It-Notes® & Memo Pads, Advertising, Shipping and Weather Resistant Labels, Return Address Labels) ▪ Order Form 3 – Stamps & Daters ▪ Order Form 4 – Embosser & Corp. Kit ▪ Order Form 5 – Badges, Signs and Banners

²⁵ TBD

²⁶ TBD

7.2.8.3. Stamps & Engraving Info

Use Case ID	Description
	Stamp Cross Reference Guide – Since the advertised stamp sizes will change slightly with stamps from what stores, PSS and customer may have become accustomed to a reference guide will be provided to help them correctly identify the same stamp with the updated dimension. This will likely be a PDF.
	Notary Specifications by State – PDF of all possible state rules and formats that are acceptable. This should be updated (Yearly at the least or possibly Semi Annual or Quarterly)
	Cosco Engraving Cross Reference Guide – Determine if this is necessary and helpful for PSS as their engraving program is changing over, if yes are any updates/changes needed. Retail may also still find this useful. This will be completed during the design/content phase which is not dependent on PRD approval. ²⁷ PDF document.

7.2.8.4. Reports

Use Case ID	Description
	Daily Status Report – This report is generated from the Taylor backend. A connection will be required every night from the Taylor backend to update these. Note – when accessing this report in a retail store there needs to be some logic to only present the store with their Daily Status Report. PSS accessing this will all see the same report and will be another connection to the backend that will give them visibility to everything occurring with dot-com orders in total, not just PSS orders.

7.2.8.5. Credit Memo

Use Case ID	Description
	This is another report generated from the Taylor backend. A connection will be required every night from the Taylor backend to update these. Note – when accessing this report in a retail store there needs to be some logic to only present the store with their Credit Memos.

7.2.8.6. Key Indicator Report

Use Case ID	Description
	This is an excel report created by Staples & Taylor that can be loaded to a link in the Associate Tools, this would be updated monthly. This will be a Retail Report, but will be visible to everyone accessing the Control Panel.

²⁷ TBD

7.2.9. Retail Manual Order Release

STAPLES copy&print CONTROL PANEL Welcome, unrlawrence. LOGOUT

Tabs will be customized by login and access

Unreleased Retail Orders Manual Release

Store Number: Order ID: Email: Order Date From: 10/1/2010

First Name: Last Name: Staples Rewards / Customer No.: Order Date To: 10/9/2010

* Not all fields searched are shown in results

Order Time	Order ID	Rewards / Cust No.	Name	Store	Total	Released By:
10/8/2010 1:00 PM	XXXXXXXXXX	XXXXXXXXXX	LA OFFICE - 4333	1111	\$40.27	<input type="text"/> <input type="button" value="Release"/>

Use Case ID	Description
	In the event there is something that affects the ability for an order to be released on the Staples side, there needs to be a tool in the Control Panel only available to Staple and Taylor Managers that allows them to push an order to production without the release of Staples occurring.
	The page that presents will display all placed retails order that remain unreleased. There will be the following search tools to help locate the order needed: <ul style="list-style-type: none"> Order Number Date To & Date From to search a Date Range Store Number First Name & Last Name to search by Customer Name Customer email Staples Rewards Number
	If any field is entered with incorrect data it will return no results, if the format is for the search field entered is not in a correct format to conduct the search appropriate error messages would appear to assist the user in re-entering their search criteria.
	Once the order in questions is located there will be the ability to release it and document some information that will be stored with this order in the event it needs to be identified.
	Before an order can be released it will require that the person releasing the order enter their name. If this is not entered an error will display indicating that your name is required.
	If the name is entered and the Release button is clicked, a pop up will display asking, "Are you sure you want to release this order to production?"
	Clicking Yes to "Are you sure" will release the order to production.
	Clicking No to "Are you sure" will return the user to the previous page without releasing the order.
	The released status date/time and who released the order will be stored, but since the release notification didn't come from Staples, Taylor would need to send notification to Staples OMS system that the order released to update the status of the order as in production.

7.2.10. Control Panel Saved Orders

Use Case ID	Description
	This page will be available to those with an Admin ID (PSS, Store and other users that use the system). Accessing this page will log all saved orders generated by Stores or those with an Admin ID.
	There will be a filter like the orders page. Stores will enter this page defaulted to their stores saved orders. All other admin users will default to All Orders when entering this page.
	There will be search fields to help more easily locate an order: <ul style="list-style-type: none"> ▪ Store Number ▪ Label ▪ Description ▪ Order Date From & Order Date To
	Once a correct order is located the user will have the ability to add all saved items to their cart.
	Once added to the cart the user will have the ability to edit design or option for appropriate items.
	Users can delete the order from the cart. If the user chooses to delete the order a message will display asking, "Are you sure you want to delete this order?"
	Clicking Yes to "Are you sure" will delete the order.
	Clicking No to "Are you sure" will return the user to the page without deleting the order.
	All saved orders will remain saved for 7 days from the time they were originally generated. After 7 days have passed the saved orders will no longer be available.

8. HISTORY/LEGACY ORDERS

Use Case ID	Description
	Legacy history orders from e-Print will be available for look up in the old application for 6 months.
	Legacy e-Print order data will be available for 2 years to query if a request is submitted from Staples.
	Legacy history orders from FCP Retail & dot-com will be available for look up in the old application for 6 months.
	Legacy FCP Retail & dot-com order data will be available for 2 years to query if a request is submitted from Staples.
	Going forward with the new application, all Orders will be available for view and reorder for 2 years. Once two years have passed orders will be purged from the system and will no longer be available to view or reorder.
	Going forward with the new application, all order history data will be available to query for 2 years per Staples requests. Once two years have passed the information will be purged from the system.
	Any saved orders will be saved for a period of 7 days. If the order has not been ordered and 7 days have passed the information will be purged from the system.

9. CONNECTIONS AND COMMUNICATIONS: STAPLES AND TAYLOR

These are the known connection points where communications happen between Staples & Taylor that must be in place to have the new application conduct business.

Use Case ID	Description
	Taylor will need the order number format desired or if there a prefix to ensure that order numbers will not overlap any other vendors and can be uniquely identified in the Staples system. The order numbering convention decided will be used for all of 2.0. Desired format will be to use prefix 204 for all order numbers generated from the FCP 2.0 system. The maximum length of the order number is 10 digits. (Per Chris 10-21-10) ²⁸

9.1. DOT-COM KANA CONNECTION/POW ENCRYPTION PROCESS

Use Case ID	Description
	All dot-com orders that have collected payment credit card information for processing will be submitted through the POW Credit Card encryption process to Staples.

²⁸ Clarify this.

Use Case ID	Description
	All dot-com orders that require payment processing will continue to send a text post to Staples Kana in the following location: https://www.staplesDot-com/office/supplies/StaplesCsrEmail?storeId=10001 .
	The Staples Kana team will must have access to a tool in the Control Panel to enter the P.O. to release the orders.
	If an order post fails to Staples we need to have re-try logic up to a specified amount. If the order is still not accepted, then a developer is notified to investigate. Note: FCP dot-com currently has a page to resubmit orders to Kana that may be required going forward. Keep this, same as today in the even there is an issue. http://www.staplescustomprintingDot-com/interfaces/httpost/resendstaplespost.aspx
	Once an order number is entered and the user hits Resend Staples Post the page will update indicating order XXXXXXXXXX Sent. <div style="text-align: center;"> Order ID: <input type="text"/> <input type="button" value="Resend Staples Post"/> </div>
	If a dot-com order with a delivery component is expedited, there needs to be an indicator to Staples Kana to handle these order with priority. This will be identified by using one of the expedited shipping SKUs found in section 3.3.1.

9.2. Dot-com CHEETAH MAIL DART TAGS

Use Case ID	Description
	Dart tags to pass information back and forth to Cheetah Mail will be required of the new system. This will pass customer information to Staples to assist with customer acquisition.
	Cheetah mail will only need to connect information from the customers visiting the dot-com & Retail view of the application..
	Dot-com will collect at check out in either Customer Info or Shipping Info.
	Retail will collect at check out on the Customer Info.

9.3. RETAIL CONNECTION TO RELEASE ORDERS (OMS)

Use Case ID	Description
	An order notice XML will be submitted to Staples once an order is placed.
	Staples will send back an acknowledgement that they received the communication. If Taylor haven't received an acknowledgement after so many re-tries a developer will be notified to investigate the issue.

Use Case ID	Description
	XML will need to match the XML examples provided in the AutoRelease_ICD(v1.0).doc file.
	During design we will have an example of the required XML needed for this process for orders placed on the Retail view of the application. This example is not required for PRD approval. ²⁹
	Once Staples has matched up the order and that same order has been paid for on the Staples side, Staples will release the order to Taylor either in a batched order process or in real time, depending on how far along the SOMS project is by the time we release.
	Taylor will send back an acknowledgment that the order release XML was received. If not acknowledged, either retry logic or notification will be needed to a developer at Staples for investigation.
\	The majority of orders will be handled through the electronic release process. However there is a need for the ability to release orders manually should there be an issue that prevents an order(s) from being electronically released. Only Staples/Taylor Managers would have the ability to release orders via this manual back up process.
	Need to determine whether or not Special Characters need to be stripped out of the XML sent to Staples. Note This is likely needed as we had some past issue with this on the legacy e-Print system. Need Staples to Confirm during technical design.
	We will need to send Staples Retail information for all the following orders for the SOMS Order Management system. See the PRD – SOMS Taylor Integration 0.4.doc. <ul style="list-style-type: none"> ▪ Dot-com placed in store only order – All in store items to be paid at POS. ▪ Dot-com placed mixed order – All in store items to be paid at POS. ▪ Retail placed delivery order – All delivery items to be paid at POS. ▪ Retail placed mixed order – All delivery and in store items to be paid at POS. ▪ Retail placed in store only order – All in store items to be paid at POS.³⁰

9.4. WEB ANALYTICS

Use Case ID	Description
	Implement tags throughout the applications as specified in Document Taylor Web Analytics Implementation.docx. Staples has required that they tagging on each page to use Staples Web Analytics tool Omniture.

9.5. BDP REWARDS DISCOUNT PROCESS

Staples has some rewards customers that contract to spend a certain amount of dollars with Staples and in return for this business, Staples extends special rewards pricing to this group in three tiers 1, 2 & 3. (1 Entry Level, 2 Mid Level and 3 Highest Level).

²⁹ TBD

³⁰ Are there any requirements in this that have development or testing value?

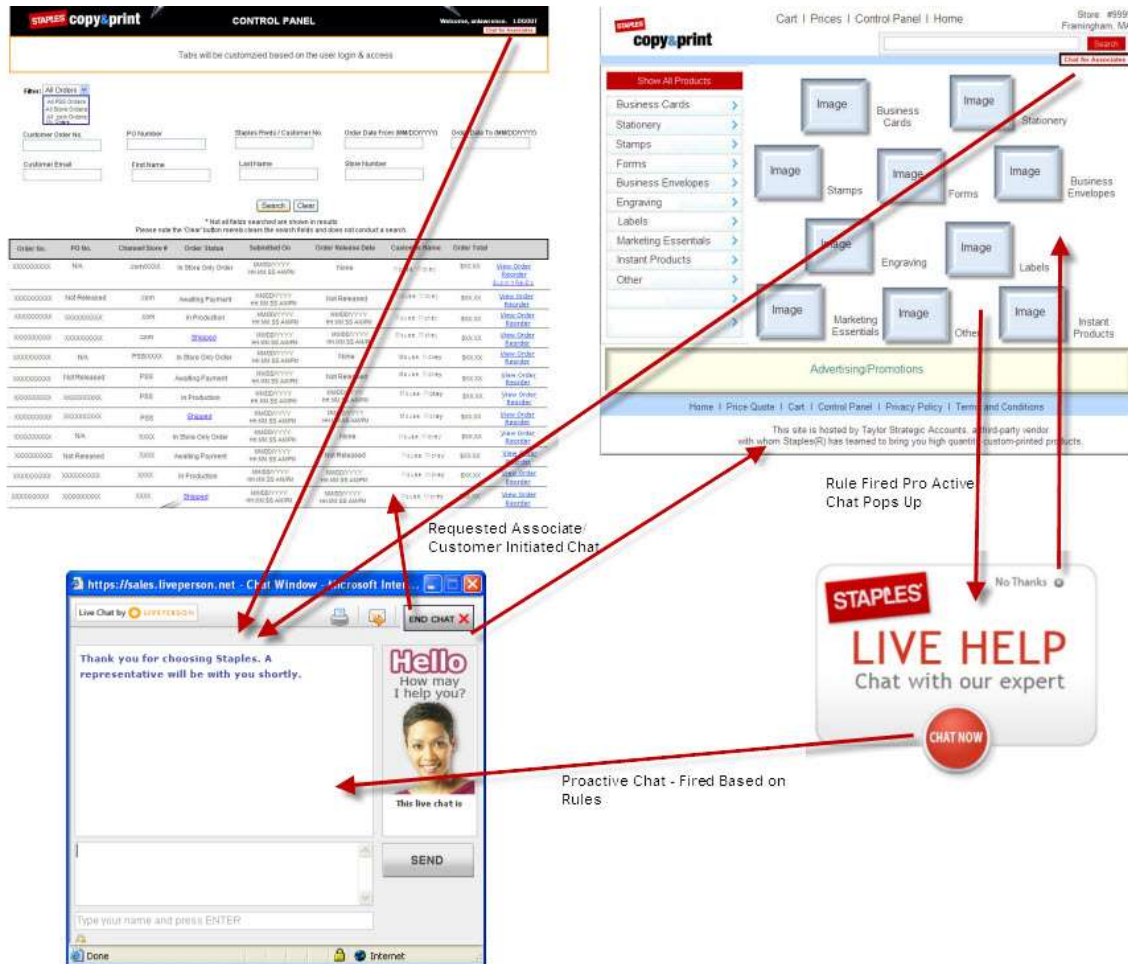
Use Case ID	Description
	If during check out a rewards number is entered a communication will be sent to Staples containing the Rewards Number and the SKU's present in the cart.
	The communication will arrive at Staples where a process will be done to check if the rewards number is BDP. If the rewards number is BDP a process will check for any discounts related to the SKU's ordered.
	Staples will send a communication back everytime one is sent regardless if there is a discount or not. If a discount is there it will identify the SKU to be discounted and will list the discounted price.
	When this occurs there will be a process on the FCP 2.0 application that will take the discounted SKU prices and subtract them from the original prices to develop a total BDP discount that will be applied to the cart. This BDP discount will be labeled to let the customer know that they received special savings.
	When final order XML is transmitted to Staples if a BDP discount was present Staples will need to have the original SKU price and the new discounted price per item sent.

DRAFT

10. CHAT

10.1. RETAIL CHAT

Retail will have two methods of chatting, a requested chat and a proactive chat.



10.1.1. Requested Chat

This type of chat is store or customer initiated.

Use Case ID	Description
	A place will be designated where the chat button will appear on the Retail application. Suggested in the header right under the Search. ³¹
	The Chat button will only be displayed when an MCC associate is available to chat during set MCC hours and when an associate is available to accept a session.

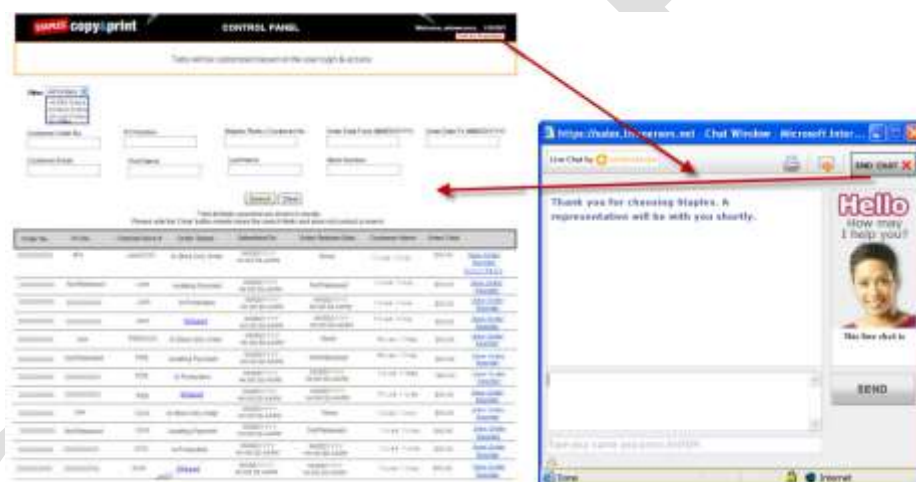
³¹ This needs to be resolved.

Use Case ID	Description
	The user clicks the Chat button (when available) to open the chat window and begin the chat.

10.1.2. Proactive Chat

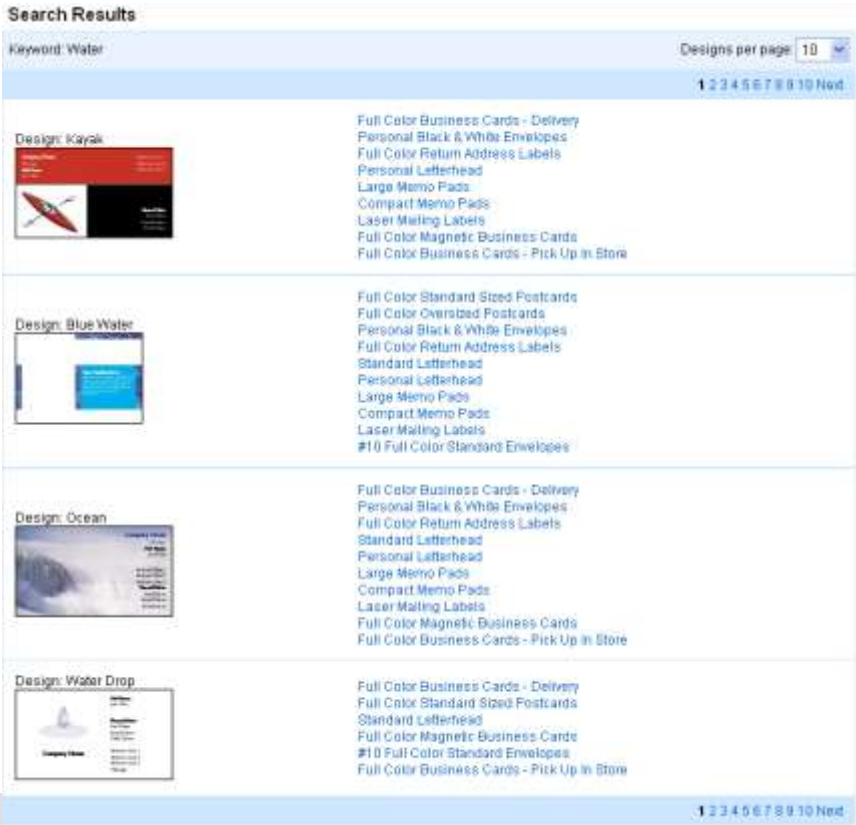
Use Case ID	Description
	Proactive chats will only engage when an MCC associate is available to chat. If an MCC associate is not available due to off hours or already engaged in maximum number of chats, a proactive chat will not engage even if a rule has been triggered.
	Proactive chat initiates when a rule has been triggered indicating the customer might require assistance.
	The user can engage in proactive chat if desired or can close if they don't want to chat.

10.2. Dot-com CHAT



Use Case ID	Description
	Dot-com will only have a chat feature located in the Control Panel for PSS to access.
	There will also not be any proactive chat sessions for dot-com or PSS using the dot-com site.
	Since there will be no chat for the dot-com view of the site, there will not be any reporting tied to conversations w/ PSS to see if this tool is impacting any sales.

11. SEARCH

Use Case ID	Description
	<p>The site will need to have the ability to search by design names/terms. Enter in the search field words related to a design or the design name itself and the site will return results of designs related, with each related design there will be a link to all types of products available.</p>  <p>Search Results Keyword: Water Designs per page: 10 1 2 3 4 5 6 7 8 9 10 Next</p> <p>Design: Kayak Full Color Business Cards - Delivery Personal Black & White Envelopes Full Color Return Address Labels Personal Letterhead Large Memo Pads Compact Memo Pads Laser Mailing Labels Full Color Magnetic Business Cards Full Color Business Cards - Pick Up in Store</p> <p>Design: Blue Water Full Color Standard Sized Postcards Full Color Oversized Postcards Personal Black & White Envelopes Full Color Return Address Labels Standard Letterhead Personal Letterhead Large Memo Pads Compact Memo Pads Laser Mailing Labels #10 Full Color Standard Envelopes</p> <p>Design: Ocean Full Color Business Cards - Delivery Personal Black & White Envelopes Full Color Return Address Labels Standard Letterhead Personal Letterhead Large Memo Pads Compact Memo Pads Laser Mailing Labels Full Color Magnetic Business Cards Full Color Business Cards - Pick Up in Store</p> <p>Design: Water Drop Full Color Business Cards - Delivery Full Color Standard Sized Postcards Standard Letterhead Full Color Magnetic Business Cards #10 Full Color Standard Envelopes Full Color Business Cards - Pick Up in Store</p> <p>1 2 3 4 5 6 7 8 9 10 Next</p> <p>Example: Search for “Water” a result that is returned is the design “Ocean” and lists all products with this design available that will link to the appropriate product studio.</p>
	<p>There are many designs, so there is a tool in the upper right hand corner that allows the user to display so many designs per page and numbering to page through to help locate a desired design/product. Clicking on the product link will take the user to that products design studio with the design loaded to being configuring.</p>

Use Case ID	Description
	<p>A customer can search by product terms or keywords. For instance, if searching for stamps with a of 1" x 2" the site would return the following results for stamps of that size:</p> <p>Search Results</p> <p>Keyword: 1" x 2"</p> <p>ACCU Stamp - 1" x 2"</p> <p>Notary ACCU Stamp - 1" x 2"</p> <p>2000+ Stamp - 1" x 2"</p>
	<p>If a product link is selected from the search results, the customer will be taken to the studio to configure the selected product.</p>
	<p>If a product description were entered as a keyword, then the search results will return product results that matched the description:</p> <p>Search Results</p> <p>Keyword: Business Cards</p> <p>Full Color Custom Business Cards</p> <p>Full Color Raised Print Business Cards</p> <p>Instant Full Color Business Cards</p>
	<p>If a product link is selected from the search results, the customer will be taken to the designs page to select a design and begin configuring this product.</p>
	<p>Search by SKU will not be necessary because customers won't be looking at SKU's on the site</p>
	<p>Staples would also like the search by SKU ability for the quantity of 1 stamps SKUs as these are the most common quantity of stamps ordered and stores and reps likely recall them. Searching by the SKU will direct the user to the stamp studio with the particular stamp in question selected.</p>