Enlogic

Phase 2 Internal Development

Statement of Work

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Project Overview

The project includes the deployment of both, Partner and Distributor Zone, enhancements to the NetSuite Translation Feature, as long of the improvements of the Warranty Registration form.

Project Requirements

These requirements comprehend the whole project's scope and these are the only requirements that are going to be tested and delivered 15 working days prior to soft launch.

Project Areas

- Distributor Zone

- Partner Zone

- Marketing Zone

- Marketing Points Management

- Training Zone

- Translation

- Account Information

a) Distributor Zone

Definitions
a) A Distributor is a NS Customer with a specific Distributor custom access role (id: accessrole) assigned to the customer record.

User Stories
a) Enlogic will be able to set up as many Distributor custom access roles as needed to differentiate different types of distributors (Distributor 1, Distributor 2, Distributor 3 etc.)

b) The Distributor logs into the website using the NetSuite standard Log In Page (Log In link on the current website's header).

c) When Customers with Distributor access roles (for the purpose of this document they will be called Distributors) log into the website they will see these tabs displayed on the header:

- Environments (*already created*)

- Products (*already created*)

- About Us (*already created*)

- Contact Us (*already created*)

- Product Cart (*already created*)

- Partners w/submenu //to be designed - see M. Bruner for scheduling// (*requirements specified on section b) Partner Zone*)

- Distributor Zone w/submenu //to be designed - see M. Bruner for scheduling// (*requirements specified below on this same section*)

d) When logged in Distributors roll over the Distributor Zone tab a submenu will be displayed. This submenu will contain these links:

- View Orders (linking to the View Orders page - *requirements specified below on this same section*)
- Enlogic PDU Configurator (linking to the PDU Configurator page - *already implemented*)
- Training Zone (linking to the Training Zone - *requirements specified below on section c) Training Zone*)
- Marketing Zone (linking to the Marketing Zone - *requirements specified below on section d) Marketing Zone*)
- Account Information (*requirements specified below on section i) Account Information*)

e) After the Distributor logs in, the Distributor Zone tab will be automatically displayed on the header after the page is automatically refreshed by the system when login credentials are submitted and accepted.

f) When the Distributor clicks on the Distributor Zone link on the header he/she will be taken to the **View Orders** page //to be designed - see M. Bruner for scheduling// where he/she will be to see a list of all the sales orders placed by him/her.

g) When the Distributor lands on the View Order page, the sales order list will be displayed and by default, sorted by date, in descending order.

h) The Distributor will have the ability to sort the sales order list on the View Order page by each column, which means that each column displayed will provide the user with the possibility to sort the list content.

i) The Distributor will see up to 50 results per page on the View Orders page.

j) Pagination on the sales order list of the View Orders page will only be displayed if the Distributor has more than 50 orders to display and it will include first/last and next/previous controls, and direct page navigation feature.

k) The Distributor will have the ability to retrieve the content of any specific order. The Sales order list will include a "View" link which will open a new browser tab displaying the sales order page with the sales order's content.

l) The Distributor will have the ability to print the View Orders page by using the print feature of the browser.

m) The Distributor will have the ability to print the sales order page by clicking a "Print" button on the sales order page that will generate automatically a PDF based on the template configured in NetSuite's backend.

n) On the View Orders page the Distributor will have the ability to see a custom message displayed ONLY to distributors on top of the View Orders page.

o) Enlogic will be able to set up custom messages for distributors depending on the role assigned to the Distributor (e.g. a message for customers with role Distributor 1, another message for customers with role Distributor 2)

p) On the View Orders page the Distributor will have the ability to see a custom message displayed ONLY to him/her, a customer specific message on top of the View Orders page.

q) The Distributor will be able to see product specific custom messages displayed ONLY to him/her on the product page or item list pages.

Architecture/Configurations

a) A **Distributor Roles/Messages custom record** will be created to store all roles associated to distributor access and assign messages (if needed) to each one to be displayed on the View Orders page (*requirements specified above on this same section)* and on the Training Zone Landing Page (*requirements specified below on section c) Training Zone).*

b) The Distributor Zone will be implemented as a NS tab with audience and only customers with Distributor role will be granted access.

c) A saved search will be created to group all sales orders placed by customers with Distributor access role. This saved search will be published on the website to the "View Orders" page and filtered, using custom scripting, to only display those sales orders which belong to the logged Distributor.

d) The NetSuite print feature will be embedded within a Suitelet that will be triggered when the "Print" button is clicked on the sales order page.

e) A Distributor Message custom entity field will be created on the customer record to store the customer specific messages to be displayed on the View Orders page.

f) A Distributor Message custom field will be created on the item record to store the product specific messages to be displayed on the product pages or item list pages.

Restrictions/Considerations

a) In order to enable Distributor roles on the system marketing team will have to create them and then add them to the Distributor Roles/Messages custom record. Manual will be provided before UAT.

b) No design efforts will be quoted to designing the Distributor Zone page since it will only contain one link. This page will be created using the website's styles.

c) The sales order list on the View Orders page on the Distributor Zone will show all sales orders placed by the Distributor with no filter implemented.

d) On the View Orders page on the Distributor Zone, the number of results per page will be 50 and it cannot be changed by the user.

e) The sales order opened from the View Orders page can only be viewed, no editing or re-ordering feature is available from the website, and will not include a track link for shipments tracking.

f) The print feature will open a new tab with the PDF or download the PDF file automatically depending on web users' browser configurations. This configuration cannot be forced within the system.

b) Partner Zone

Definitions

a) A Partner is a NS Customer with a specific Partner custom access role (id: accessrole) assigned to the customer record.

User Stories

a) All website users not logged in with Distributor or Partner roles will see displayed these tabs on the header:

  - Environments (*already created*)

  - Products (*already created*)

  - About Us (*already created*)

  - Contact Us (*already created*)

  - Product Cart (*already created*)

  - Partners w/submenu //to be designed - see M. Bruner for scheduling// (*requirements specified below on this same section*)

b) When all website users not logged with Distributor or Partner roles roll over the Partners tab a submenu will be displayed. This submenu will contain these links:

  - Partners' Benefits (linking to the **Partners' Benefits Informational Page** //to be designed - see M. Bruner for scheduling – schedule responsibility- M. Bruner// - *requirements specified below on this same section*)

  - Partner Registration (linking to the **Partner Registration Form** //to be designed - see M. Bruner for scheduling – schedule responsibility- M. Bruner//// - *requirements specified below on this same section*)

  - Partner Login (linking to the NS standard login page)

c) By clicking on the Partners tab or the Partners' Benefits link on the Partners submenu, the website user will be taken to the Partner's Benefits Informational Page that will display to them information.

d) In house peronel will be able to edit the content of the Partner's Benefits informational Page on the NetSuite's backend. Manual will be provided before UAT.

e) All website users will be able to register as a distributor or as a partner through the Partner Registration Form, accessed through the Partner Registration link on the Partners submenu. Partner Registration Form fields are yet TBD – need feedback from Sales/marketing.

f) As a validation process, Enlogic will have to manually assign the corresponding Partner/Distributor custom access role (field id: accessrole) on the lead record before the partner/distributor can have access to the Partner Zone or Distributor zone.

g) Marketing will be able to set up as many Partner custom access roles as needed to differentiate different types of partners (Partner 1, Partner 2, Partner 3 etc.)

h) Partners log into the website using the NetSuite standard Log In Page (Log In link on the current website's header).

i) When Customers with Partner access roles (for the purpose of this document they will be called Partners) log into the website they will see these tabs displayed on the header:

- Environments (*already created*)

- Products (*already created*)

- About Us (*already created*)

- Contact Us (*already created*)

- Product Cart (*already created*)

- Partner Zone w/submenu //to be designed - see M. Bruner for scheduling// (*requirements specified below on this same section*)

j) When logged in Partners roll over the Partner Zone tab a submenu will be displayed. This submenu will contain these links:

- Partners' Benefits (linking to the Partners' Benefits Informational Page - *requirements specified below on this same section*)

- Enter Partner Zone (linking to the **Partner Zone** //to be designed - see M. Bruner for scheduling – schedule responsibility- M. Bruner//// - *requirements specified below on this same section*)

- Enlogic PDU Configurator (linking to the PDU Configurator page - *already implemented*)

- Training Zone (linking to the Training Zone - *requirements specified below on section c) Training Zone*)

- Marketing Zone (linking to the Marketing Zone - *requirements specified below on section d) Marketing Zone*)

k) The Partner will have access on the Partner Zone to information pages and downloadable items. Manual to maintain Partner Zone's content will be provided before UAT.

Architecture/Configurations

a) A **Partner Roles/Messages custom record** will be created to store all roles associated to partner access and assign messages (if needed) to each one to be displayed on the on the Training Zone Landing Page (*requirements specified below on section c) Training Zone*).

b) The Partners' Benefits Informational Page will be created using a NetSuite Information Item published on the website.

c) The Partner Registration Form will be created using a NetSuite Information Item published on the website.

d) A custom registration form will be embedded within an html iframe tag on the Partner Registration informational item

e) The Partner Registration Form will have a "Register as" custom dropdown for the user to choose if he/she wants to register as a distributor or as a partner and the value will be stored on the lead record created under the custom tab.

f) Upon submission, the Partner Registration Form will create a NetSuite Lead record.

g) The Partner Zone will be created using a NetSuite tab with audience feature.

h) The structure and content of the Partner Zone will be built with standard NetSuite categories, information items and downloadable items using standard NetSuite content management feature.

Restrictions/Considerations

a) Scripting or customizations to build the structure and content of the Partner Zone needed from Marketing
   Need fast track – see MBruner for schedule.

c) Training Zone

User Stories

a) When Partners or Distributors log in they will be able to access the **Training Zone** //to be designed - see M. Bruner for scheduling// from the corresponding submenus.

b) The Distributor/Partner will have access on the Training Zone to information pages and downloadable items. Manual to maintain Training Zone's content will be provided before UAT.

c) The Distributor/Partner will be able to play videos directly on the page using using the Youtube player.

d) A link with the Enlogic Youtube channel will be created to allow the users of the website to play the videos in the enlogic.com site.

e) On the Training Zone landing Page the Distributor/Partner will have the ability to see a custom message displayed ONLY to distributors or partners.

f) Enlogic will be able to set up custom messages for distributors/partners depending on the role assigned to the Distributor/Partner on the Partner Roles/Messages or Distributor Roles/Messages custom records (e.g. a message for customers with role Partner 1, another message for customers with role Partner 2 and a different one for customers with role Distributor 2)

g) On the Training Zone Landing Page the Distributor/Partner will have the ability to see a custom message displayed ONLY to him/her, a customer specific message.

h) The Distributor/Partner will be able to see product specific custom messages displayed ONLY to him/her on the product page or item list pages.

Architecture/Configurations

a) The Training Zone will be implemented as a NS tab with audience and only customers with Distributor or Partner roles will be granted access.

b) The structure and content of the Training Zone will be built with standard NetSuite categories, information items and downloadable items using standard NetSuite content management feature.

c) A Training Message custom entity field will be created on the customer record to store the customer specific messages to be displayed on the Training Zone landing page.

d) A Training Message custom field will be created on the item record to store the product specific messages to be displayed on the product pages or item list pages.

d) Marketing Zone

User Stories

a) When Partners or Distributors log in they will be able to access the **Marketing Zone** //to be designed - see M. Bruner for scheduling// from the corresponding submenus.

b) The Distributor/Partner will have access on the Marketing Zone to information pages and downloadable items. Manual to maintain Marketing Zone's content will be provided before UAT.

l) The Marketing Zone landing Page will also include a link to a **Marketing Gear Request Form** //to be designed - see M. Bruner for scheduling// for the Distributor/Partner to request any Marketing Gear. Marketing Gear Request Form fields are yet TBD.

c) On the Marketing Zone landing Page the Distributor/Partner will have the ability to see a custom message displayed ONLY to distributors or partners.

d) Enlogic will be able to set up custom messages for distributors/partners depending on the role assigned to the Distributor/Partner on the Partner Roles/Messages or Distributor Roles/Messages custom records (e.g. a message for customers with role Partner 1, another message for customers with role Partner 2 and a different one for customers with role Distributor 2)

e) On the Marketing Zone landing Page the Distributor/Partner will have the ability to see a custom message displayed ONLY to him/her, a customer specific message.

f) The Distributor/Partner will be able to see product specific custom messages displayed ONLY to him/her on the product page or item list pages.

Architecture/Configurations

a) The Marketing Zone will be implemented as a NS tab with audience and only customers with Distributor or Partner roles will be granted access.

b) The structure and content of the Marketing Zone will be built with standard NetSuite categories, information items and downloadable items using standard NetSuite content management feature.

c) A Marketing Message custom entity field will be created on the customer record to store the customer specific messages to be displayed on the Marketing Zone landing page.

d) A Marketing Message custom field will be created on the item record to store the product specific messages to be displayed on the product pages or item list pages.

e) The Marketing Gear Request Form will be created using a NetSuite Information Item published on the website.

f) A custom registration form will be embedded within an html iframe tag on the Marketing Gear Request Form informational item.

g) The Marketing Gear Request Form will generate a Lead in NetSuite which can be merged to the customer record in the particular case of an already existent customer.

e) Marketing Points Management

a) Each customer will have a list of earned points with Enlogic.

b) The points will be manually added into the customer record.

c) The points will be stored in a custom record type called *Marketing Points*.

d) The record type will have the following fields: *date, memo, point, add or subtract.*

e) The points will be subtracted every time a sales order is created and a marketing gear is included in that order.

f) Each marketing item will have a value in points defined in a record type which will include: *item id, points.*

g) The calculation of points to subtract will be done tacking the value in points of the item and the quantity purchased.

h) In case the sales order gets cancelled, the points record will need to be manually updated. No automatic reassignment of the points will be done.

i) The points per customer can be reported using a saved search.

f) Translation

a) The WebSite needs to have the ability to display the information in several languages. These languages need to be dynamically added using the NetSuite back-end. This requirement will leverage the *NetSuite Translation Module* (Please see documentation attached: SetUpTranslation.pdf & TranslationNamesandFields.pdf) and include a set of adjustments to accommodate the custom made section. The set up of the translation module is included in the present SOW.

b) The following scripting adjustments need to be addressed in order to adapt the NetSuite Standard Translation Feature so as to fit Enlogic's requirements:

    i. Scripting has to be developed so as to change the main navigation menu on the header.

    ii. Scripting will have to be applied to change all buttons throughout the site.

    iii. Scripting has to be developed in order to change the PDU selector feature.

c) New assets will be required to develop every time a new language is implemented. This assets may include the below mentioned list. Please bear in mind this are possible assets but it is not a closed list, further modifications may be needed.

    i. Product images

    ii. Action buttons

    iii. Landing Pages Images

    iv. Top Menu html

    v. PDU Selector Options Text.

d) The top navigation menu needs to be re factored so as to be pulled from a javascript file which will be pulled depending on the selected language. The content of the Item Detail Pages will be re arranged too to meet this requirement.

e) The language selection will be managed by NetSuite out of the box functionality. Design UX Team customizations will be deployed to extend the Standard Transaction Capabilities and will read the NetSuite language ID cookie to determine which language is to be selected and utilized.

f) A custom record type will be created to define a language and the asset selected for that particular language.

g) The website will be mapped to specify a set of locations where the images/buttons will be changed by the code. (Please see Sample Wireframe 1 & 2 attached).

h) A quick reference card pdf will be developed with the purpose of guiding the user on which location corresponds to each asset or text in the WebSite and if it is to be changed in the standard NetSuite Module Section or in the Custom Records.

i) Each item will include a sub-list which will be used to determine the images to be used per language (Please see Wireframe 6 attached).

g) Account Information

a) The My Account section will be enabled with the following features: invoices paid, invoices outstanding, returns.

b) The standard my account will be used and no customization is to be performed.

Restrictions

1. The order list will not retrieve more than 150 orders maximum.

2. The orders shown in the List cannot be cancelled or modified from the WebSite.

3. All lists show up to 50 results per page, no customization allowed from the user.

4. The language selection will be managed by NetSuite, the customizations are to be deploy to extend the translation capabilities and will read the NetSuite languageId cookie to determine which language was selected. The customization will not include a language selector feature.

5. The CSV download from the get stock feature will not support GDOC manipulation.

6. The translation will only affect the sections and assets declared in the mapping documentation.

7. The content of the item detail page will be re-arranged in the back-end to leverage the translation module, the website will not suffer changes because of this re-arrange.

Risks

1. The website page load can be affected because of the translation scripts, this can be minimized using compressed JS and web optimized images. The implementation of NetSuite Development Best Practices (SAFE) can minimize this risk.

2. The Place Order Section in the cart can be impacted during the partner/distributor zone Development. The development will be done in test mode to prevent a live website impact, a regression test session needs to be schedule as one of the Phase 2 go live tasks.

3. Website Layout can be affected during the Translation Suitelet Deployment. This Deployment will be done in test mode in order to prevent a live website impact, a regression test session need to be schedule as a one of the Phase 2 go live tasks.

Platform Requirements

1. Items already created
2. Fully functional sales process in NetSuite.
3. SuiteFlex module deployed
4. Full access and administrator role required
5. Functional NetSuite website deployed.
6. PDU selector application deployed
7. Translation module installed

Compatibility

Supported NetSuite version

2012.2

Browser Compatibility

Firefox 5, 6, 7, 8, 9, 10, 11, 12

IE 8, 9+

Safari 4, 5

Chrome 16, 17, 18

Operating System Compatibility

Mac OSX 10.7, 10.6

Windows 7, Vista, XP SP3 & SP2