



## Scope Document

Customer Name	
Email Address	
Contact Name(s)	
Type of business / products	
<p>What is your Existing Accounts Stock/SOP/POP/CRM Software? Do you get Speed issues or Data Corruption? What is support like?</p> <p>Why do you want to change?</p>	
Qty of users Required?	
<p>Qty of Companies or Databases? Do you want to consolidate Datasets?</p>	
<p>Qty of Location/branches? User Split? Qty of Remote Workers?</p>	
<p>Is there anything unusual or difficult about your business or procedures? i.e. if you talked to other software providers and they could not do it out the box.</p>	
Looking at other software?	



Customer	
<p>Qty of Customer accounts?</p> <p><a href="#">Customer Enquiry Video</a></p> <p><a href="#">Creating a Customer Video</a></p>	
<p>Qty of sales orders per month?</p> <p>Qty Telephone Orders. Would you like to be able to prompt customers about items they usually order and add to the order easily to increase order values?</p> <p><a href="#">Creating a Sales Order Video</a></p> <p>Qty Email orders. Would it be useful to import these into an order?</p> <p>Qty Web Orders. Do these automatically come into order processing?</p>	
<p>What is your sales order process?</p> <p>i.e. Quote -&gt; SO -&gt;</p> <p>Allocate Promise Stock -&gt;</p> <p>Send order confirmation -&gt;</p> <p>Print Pick Note -&gt;</p> <p>Packing Area Confirm Quantities &amp; Weights -&gt; Print carrier label or Own Delivery -&gt; Print Delivery Note -&gt; Dispatch -&gt;</p> <p>Email Invoices</p> <p>Do you send consolidated Invoices Weekly, Monthly?</p> <p><a href="#">Consolidated Invoicing</a></p>	

<p>What are your main challenges with your current sales order process? i.e.</p> <ul style="list-style-type: none"> <li>- Difficulties allocating stock, or promising stock to customers</li> <li>- Take order then check stock</li> <li>- Need to reallocate stock to best customers?</li> <li>- Overselling</li> <li>- Pick Quality in the warehouse Wrong units of measure? Wrong items due to subtle differences in specification?</li> <li>- Put away locations changing often?</li> <li>- Manual work surrounding carrier labels, delivery notes etc.</li> <li>- Not being able to find stock</li> <li>- Difficulty handling SO volumes</li> </ul>	
<p>How are you picking goods?</p> <ul style="list-style-type: none"> <li>- Paper Pick Note Route Location order?</li> <li>- Wave picking, Consolidated Pick Note so picking multiple sales orders together bring back to a packing area?</li> <li>- One sales order at a time</li> <li>- Tote Picking, picking multiple orders into boxes on the trolley.</li> </ul>	



<p>What % of orders are Drop Ship from Supplier direct to Customer?</p> <p><a href="#">Drop Ship Doc</a></p> <p>Do you back to back purchase order for some sales order item lines?</p> <p><a href="#">Back to Back PO Doc</a></p>	
<p>Do you have an eCommerce Web Site? If so what is it based on? Magento2, Shopify, Big Commerce, EKM, Woocommerce, GOB2B etc.</p> <p>Do you have Web Developer that could use our API?</p> <p><a href="#">API Docs</a></p> <p><a href="#">Web Shop Connectors</a></p> <p>Are your Customers B2C or B2B or Both? i.e. Do you want to present your customers with statement of account, orders, quotes, cases, RMAs etc. when they are logged in to the web site? Would it be helpful to get a B2B web site live in 4-6 weeks?</p> <p><a href="#">GoB2B Integration</a></p> <p>Do you sell via eBay, Amazon? If so Qty of orders.</p>	

<p>Do you use Carriers to send parcels?</p> <p>If so which Carriers do you use? and the order volume per day?</p> <p>At the moment how do the order ship to addresses get into the carrier software?</p> <p>Would it be helpful to have a packing station to confirm qty picked, total weight, boxes and then it know to print carrier label or it is an own delivery, print carrier label and delivery note etc. automatically.</p> <p>Would you like to decide carrier based on order value, weight, shipping method, destination etc. ?</p> <p><a href="#">Carrier Integration Own Delivery &amp; Packing Station Doc</a></p>	
<p>Do you do Own Deliveries? Maybe to your local area.</p> <p>If so order volume per day? How many vans do you have?</p> <p>How do you currently Route plan your own deliveries? Do you use POD software like MaxOptra or TrackPOD.</p> <p>How do you deal with signed delivery notes? Would it be helpful to be able to scan / OCR them so they automatically get attached to the invoice or order.</p> <p><a href="#">Paperless Docs</a></p>	

<p>Do you sell bundles or kit items? So you pick the components plus maybe some simple assembly.</p> <p><a href="#">Kit Video</a></p> <p>Do you need to keep track of stock for finished items? Do you sell BOM Assembly items that require making to order or in Bulk using MRP works orders? Or do you just issue components as you have made them?</p> <p><a href="#">MRP Works Orders</a></p> <p>Do you sell Matrix or Attribute items like T Shirts where a style has sizes and colours?</p>	
<p>How do you price goods to customers? i.e. Retail Price, Wholesale Price, Price Lists, Category discounts, Qty Breaks, Special Price by Customer?</p> <p>How often do you have to update these prices? Would it be useful to be able to update prices lists when suppliers change cost prices?</p> <p><a href="#">Price Lists Doc</a></p>	
<p>Do you trade (sell ) in foreign currencies? Which?</p>	
<p>Do you sell to Europe / Rest of the World? If so which countries?</p>	
<p>Do you need to process RMAs returns for customers?</p> <p><a href="#">Create RMA Video</a></p> <p><a href="#">Case Returns</a></p>	

<p>How do you deal with complaints and problems? Would it be helpful to be able to log problems / complaints with service levels and deal with these overall or by customer.</p> <p><a href="#">Case Management Doc</a></p>	
<p>Do you offer Consignment stock to customers? If so Qty of Customers?</p> <p><a href="#">Consignment Doc</a></p>	
<p>Do you offer customer rebates? If so formula?</p>	
<p>Do you have customers that you send the invoice to but a head office needs the statement and pays the invoices.</p> <p>Do you need to store multiple ship-to's against a customer? Qty of ship tos per customer on Average?</p>	
<p>Do you do product based quotes and see customer pricing, usual items, last price paid etc.??</p> <p>Would being able convert to order with one click be useful?</p> <p><a href="#">Creating a Quote Video</a></p>	
<p>Would you like to send attachments / spec sheets for items on the quote automatically?</p> <p><a href="#">Quote plus Attach Documents Doc</a></p>	
<p>Would you like to send Payment links with quotes, orders and invoices for certain customers or prospects?</p> <p><a href="#">Square Up Payment Links</a></p>	

<p>Do you have a Trade Counter? i.e. where you sell from the counter to Account customers (who do not pay as they have credit terms) so they get a delivery note to sign or signature pad and accounts send invoices later, or Cash Retail (pay now) who get a receipt type customers?</p> <p><a href="#">Trade Counter Video</a></p> <p>Qty of Trade Counter stations and invoices per day?</p>	
<p>Do you need to control costs and Invoice as Projects? I.e. do you install as well as supply items.</p> <p>i.e. bring together within the project all timesheets, misc, stock, purchase orders, GRNs, bills, sales orders, invoices,</p> <p><a href="#">Projects Video</a></p>	
<p>Do you trade with any customers using EDI? i.e. you get sales orders electronically and send them invoices back the same way.</p> <p><a href="#">EDI Doc</a></p>	
<p>How do you update your customers on price changes, stock levels &amp; lead times?</p> <p>Would you like to be able to give your customer(s) a URL link or Customer Feed so they can get up to date information about your stock qty and sell price?</p> <p><a href="#">Customer Feeds Video</a></p>	

<p>Do you currently have a customer relationship management solution?</p> <p>Do you understand the benefits of CRM? i.e. Leads, Prospects, Call, Call Backs, To Dos, Meetings, Cases, Opportunities, Notes, Contact History, Contacts, etc.</p> <p><a href="#">Lead to Prospect to Customer Video</a></p> <p><a href="#">Activities Video</a></p> <p><a href="#">Opportunities Video</a></p> <p>Ho do you separate customers by purchase histories/spending habits for marketing? Target Lists</p> <p><a href="#">Target List Video</a></p> <p>Do you ever perform outbound calling campaigns to get business/retain customers?</p> <p><a href="#">Outbound Calls Video</a></p>	
<p>Do you fail to spot customer trends like them stopping buying from you or certain items?</p> <p><a href="#">Ask the Customer Video</a></p> <p><a href="#">Sales Order History Doc</a></p>	
<p>Would it be useful to keep track of what is going on across the business in one list?</p> <p><a href="#">Company Pulse</a></p>	
<p>Would you like to be able to show sales v Targets on a TV screen in the office to motivate everyone?</p> <p><a href="#">Sales Monitor</a></p>	

<p>Do you do email shots (via Mailchimp etc)?</p> <p><a href="#">Mailchimp</a></p>	
<p>Would you like to get email and activity Alerts?</p> <p>-Would you like to automatically print or email documents like statements or invoices to customers?</p> <p>-Get an email if a customer goes on hold, or items are short etc.</p> <p>-Would you like to automate tasks like posting invoices, sending a report, etc?</p> <p><a href="#">Alerts &amp; Automation</a></p>	
<p>Would you like to have computer telephony integration? i.e. make calls from customer records and screen pop incoming calls.</p> <p>What phone system do you have? Is it 3CX? Does it have a TAPI2 Driver?</p> <p><a href="#">Computer Telephony</a></p>	
<p>Would it be helpful to integrate with Creditsafe so customers automatically go on credit stop if their credit score goes down? And update credit limits?</p> <p><a href="#">Creditsafe Integration</a></p>	



Supplier	
Qty of Supplier accounts?	
Qty of Purchase orders per month?  <a href="#">Creating Purchase Order</a>	
How do you figure out what is needed to make up shortfalls of stock?  <a href="#">Auto Generate PO Routine</a>	
Do you have minimum/maximum or Reorder stock levels?	
How do you know what stock arriving on PO is allocated to outstanding SOs?	
When stock arrives, do you have a marshalling zone for checking stock in and ensuring POs are correct?	
Do you buy from Europe / Rest of the World?  Would you like to add Landed Costs to the cost of items? i.e. add freight, duty and insurance costs to the value of items so COGS is at the inflated landed cost.  <a href="#">Landed Costs</a>	
What currencies do you buy in?  Which countries do you buy from?  What are your lead times for products?	

<p>Qty of Supplier Bills per month?</p>	
<p>Would you like to be able to OCR (auto get the date, bill reference, values) Supplier PDF Bills and store them with the Bill in the system?</p> <p>i.e. get rid of paper bills so no printing, storing, filing, shredding, less errors etc.</p> <p><a href="#">Paperless Bills &amp; Documents</a></p>	
<p>Do you get Files from suppliers offering you stock updates with what they have in stock, cost price etc?</p> <p><a href="#">Supplier Price Import</a></p> <p><a href="#">Supplier Feeds</a></p>	
<p>Do you trade with any Suppliers using EDI? i.e. Purchase orders, GRNs and Bills from suppliers electronically.</p> <p><a href="#">EDI</a></p>	
<p>Do you need to report CIS information? <a href="#">CIS</a></p>	

Stock	
Qty of stock items?	
<p>Do you have a 3PL warehouse?</p> <p>Qty of warehouses?</p> <p>Do you have multiple Bin Locations already setup in the warehouse?</p> <p>Do you have usual or preferred bins for the same items? or put stock in any locations?</p> <p>Do you struggle sometimes to find items when picking?</p> <p><a href="#">Warehouses</a></p>	
<p>Do you need Batch / Serial Traceability?</p> <p><a href="#">Batch Serial Doc</a></p>	
<p>Would you like to use Barcode Picking? If so do all your items currently have bar codes?</p> <p><a href="#">WMS Bar code Picking</a></p>	

<b>General</b>	
<p>Reports &amp; Dashboards. Are there any specific reports or dashboards you would like to see? It would be good to provide examples.</p> <p><a href="#">Dashboard Designer Doc</a></p>	
<p>Do you have to wait until month end to see a profit and loss?</p> <p>Would it be helpful if the system posted COGS (cost of goods sold) with each sale?</p> <p>Also Goods IN do accruals so you could view an accurate profit and loss, balance sheet any time?</p> <p><a href="#">Profit &amp; Loss Drill down</a></p>	
<p>How do you see potential loss or gains with foreign currency customers, suppliers and bank accounts?</p>	
<p>COGS is usually at Average, Standard or Landed Average which can mean that you get differences if for example you sell items before the bill was entered and then a cost price difference to expected costs etc. How do you deal with this now?</p> <p>Would it be helpful to revalue stock at any time and correct this?</p> <p><a href="#">Stock Revaluation</a></p>	
<p>Does your accountant struggle getting data from your system? Would it be helpful if you could give them access to the system and all their reports are in one place?</p> <p><a href="#">Accountant Pack</a></p>	

<p>Do you use Exchange/365 Office for email integration? i.e. so you can email documents like order acknowledgements, invoices, statements, purchase orders etc.?  <a href="#">365 Email Integration</a></p>	
<p>Do you have a Fileserver?          If so how old is it?</p> <p>What is internet like at office? Fibre?</p>	
<p>Do you have an existing SQL database license?          SQL Express the free version can be used for lower user counts and volumes of data.</p>	
<p>Are there any Macs that need to access?          Do they already use Parallels?</p>	
<p>Do you have a timescale to implement by?</p>	
<p>Are you worried about implementation?</p> <p>The <a href="#">Implementation Plan</a> breaks down what needs to happen to go live.</p> <p>The <a href="#">University Interprise Certified Professional</a> is the implementation plan in video question format. Its free with voucher code INTERPRISE995</p> <p>The University allows you to look at Interprise in detail. It can be used presale, after sale for implementation and after go live training for new staff etc.</p>	