

BASIC USE CASE TEMPLATE

USE CASE	DURATION (MINS)	TEAM MEMBER / DEPARTMENT	USE CASE TOPICS	TEAM MEMBER RATING OF USE CASE (0-10)
Product Catalog	15	Product Operations / Product Marketing / IT	<p>Login to admin tool and demonstrate ability to:</p> <ul style="list-style-type: none"> • Verify third party products are available from third party providers (show integration of EDI 832/846 and integration of XML via various methods) • Manage / update product catalog changes • Manage price list(s), update pricing errors • Manage / override system, accessory and BOM (bill of materials) at line item level, including • Product attributes • Configuration rules • Pricing • Inventory and warehousing details 	
Configurator	25	Product Marketing / Web Operations (Configurator)	<p>Login to admin tool and demonstrate ability to:</p> <ul style="list-style-type: none"> • Setup product catalog for B2C website, assign systems and accessory products to corresponding web series to its categories • Add / update marketing descriptions for a Build to Order (BTO) system, component and part level • Open a Build to Order (BTO) XYZ product BOM configuration and verify the component / part information, change the configuration default components, e.g. "Followed by very specific actions related to the customer's business." 	
Personalization	15	Marketing / Web Operations / Merchandising (Personalization & CMS)	<p>Login to Admin tool and demonstrate the ability to:</p> <ul style="list-style-type: none"> • Organize content, creative, assets, versioning changes and audit changes within the content management tool • Create / update reusable content blocks for various pages (e.g. a new laptop category banner to be presented on specific laptops series pages) • Create / modify a microsite and a landing page • Setup to display personalized customer experience based on whether a visitor is anonymous or a registered customer 	
Merchandising	20	Marketing / Web Operations / Merchandising	<p>Login to admin tool and demonstrate the ability to:</p> <ul style="list-style-type: none"> • Setup bundling within the configurator • Setup warranty services and accessories as upsells for a given configurable system • Setup a new A/B test -- a new product category page versus the current product page (mention if a third party service is required for A/B test) 	
Break	10			
Storefront	20	Visitor	<p>Login to admin tool and demonstrate the ability to:</p> <ul style="list-style-type: none"> • Have a personalized customer experience based on customer segmentation, past visitor behavior (if any) and based on device and browser types • Intuitive navigation throughout the site including category, series and custom grouped or special landing 	
Customer service + Support	20	Customer Service / Sales / Finance	<p>OMS/CRM functions:</p> <ul style="list-style-type: none"> • CSP logs in to the OMS/CRM tool • Checks the CSP dashboard for open items, tasks and follow-ups • Look up the customer info by phone, email, order, last name, first name, company name, city and zip • Pulls the orders, order details, verifies the orders status, estimated ship dates, shipment tracking, order source, line item level, ship/RMA/payment/hold status details, order level notes / messages, payment and serial numbers for units shipped. 	

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Finance + Accounting	15	Finance / Risk Management	<p>Payment options, PayPal, financing, checks, recurring billing, fraud, order hold / release, tax nexus, shipping and order line item level payment audit:</p> <ul style="list-style-type: none"> • Setup and manage tax nexus at product SKU, series and category levels, and validate by real time integration with tax database setup and inclusive and exclusive tax pricing • Setup or flag an order, customer or company as tax exempt • Setup shipping methods, recycle fees and manage payment methods (enable / disable) • Review and verify payment for each line item of an order, credits / promotions applied • Review order hold queue and modify order details, including payment refund, return, reauthorize, appeasement, charge additional fee and cancel orders 	
Fulfillment	15	Sales Operations / Fulfillment	<p>Order processing, order split, warehouses, order fulfillment and reporting:</p> <ul style="list-style-type: none"> • Setup and manage multiple vendors, fulfillers and distributors • Setup and manage product inventory allocation for warehouses and distributors 	
B2B	20	B2B Sales / Web Operations / IT (B2B/EPP Site Setup)	<p>Site setup, account / contact management, quotes, orders, product catalog, price list and discounting:</p> <ul style="list-style-type: none"> • Setup personalized B2B and EPP sites based on size (small, medium, large) or type • Setup and manage B2B workflows 	
International	15	International	<p>Login to admin tool and demonstrate the ability to:</p> <ul style="list-style-type: none"> • Setup and manage multiple sites with a specific locale, currency, product catalog and price list for each and every international site • Setup / manage specific payment gateway, payment methods and shipping methods for each country 	
Technology	15	IT / Web Operations	<p>Provide overview of platform architecture, security, integration, performance, co-dev environment and flexibility:</p> <ul style="list-style-type: none"> • Setup and manage customization options including integrations of internal (customer) and external systems • Create and modify new templates, provision new microsites, B2B and international sites • QA: ability to preview, stage and setup workflow process 	
Reporting	10		<p>Login to the ecommerce reporting system and third party analytics and be able to:</p> <ul style="list-style-type: none"> • Create, manage and schedule various departmental standard reporting (sales, campaigns, customers, tax, payment and product reports) with support to generate in multiple formats • Create, manage and schedule executive summary reporting 	
Vendor Unique Feature	20	Marketing	<p>Provide vendor solution unique features and / or differentiating features and services:</p> <ul style="list-style-type: none"> • Q&A loyalty / reward programs, federated ID, subscription, paycheck, gift card, coupons, discounts, etc. 	
TOTAL DURATION			4 HOURS	