



Order Management System

#WinLocal



Phase 1: Onboard Form

The goal of phase one is to overhaul the current Onboard Form into a more user-friendly, intuitive solution that will reduce the frequency of resubmission requests by the Jumpstart team.

Key Features:

- Secure login using NAM
- Ability for users to save their work and complete at a later date
- Shared fulfillment information can be used across multiple products automatically
- Contextual help will guide users through the process while live help via chat or phone is available for more complex issues



Phase 2: Order Management System

The goal of phase two is to transform the Onboard Form into a complete Order Management System, adding the ability for users to view all of their clients in a centralized location.

Key Features:

- Visualize workload and action items
- Consolidated view of all clients
- Managers can view team workload
- Managers can reassign users and assign due dates
- Notifications will inform users of expiring orders, due dates, and orders that need additional information



Complex vs. Simple UX Solution

THE CURRENT INTERFACE

The current interface is a complex, multi-panel checkout form. It features several overlapping sections: 'DELIVERY INFO', 'PAYMENT / BILLING INFO', and 'SHIPPING LABEL - PACKING LIST'. Each section contains numerous text fields, checkboxes, and dropdown menus. The layout is cluttered, with a high density of data entry points. A blue callout box points to the 'PAYMENT / BILLING INFO' section with the text: "User needs to enter a lot of data into small text fields".

THE SOLUTION

The redesigned interface is a simplified, single-page checkout flow. It is organized into clear stages: 'Checkout: Delivery & Billing' and 'Shipping Manager'. The 'Shipping Manager' panel is a key feature, providing a clear overview of shipping options and a dedicated area for entering shipping details. The layout is clean, with large, clear text fields and a logical flow of information. A blue callout box points to the 'Shipping Manager' panel with the text: "Re-Designed panel is laid out in stages and makes the user aware of the address features and saved shipping options".



Project Timeline



Tasks			
Duration	Start Date	End Date	Description
1	11/16/2015	11/16/2015	Project Kickoff
6	11/13/2015	11/18/2015	Initial Requirements Gathering
38	11/16/2015	12/23/2015	Phase 1: UX Design and Requirements Gathering
64	11/19/2015	01/21/2016	Phase 1: Development and QA
7	01/22/2016	01/28/2016	Phase 1: UAT
8	01/29/2016	02/05/2016	Phase 1: Release
25	12/28/2015	01/21/2016	Phase 2 UX Design and Requirements Gathering
28	01/22/2016	02/18/2016	Phase 2: Development and QA
7	02/19/2016	02/25/2016	Phase 2: UAT
1	02/26/2016	02/26/2016	Phase 2: Release

