Your Company

123 Your Street,
Your City,
ST 12345
(123) 456-7890
info@yourcompany.com

PROCESS DEFINITION DOCUMENT

Swag Labs inc.

Batch phone order processing

DOCUMENT VERSION HISTORY

Version	Author	Date
1.x		

SIGNED OFF BY

Name	Function	Responsibility

CONTRIBUTORS

Name	Function	Responsibility

What this document is for

Before any business process can be automated, it needs to be documented carefully.

This **Process Definition Document** describes how a specific set of operations is currently performed in the organization, to collect all the information required in a clear, explicit, and shared way. What are the systems involved? Which steps are now performed manually to reach the end goal? What are the possible exceptions? How often is this process executed? What are the rules in place? This document aims to provide answers to these questions.

This information, once validated by all parties involved, will be used as the basis for the next phases in the automation of the process.

This document needs to be kept up to date with any possible changes in the involved systems and procedures for the whole lifecycle of the automation process, and all changes need to be signed off.

Current process analysis

High level description

The process is used to manually insert into the website orders that are collected on the phone.

These are customers that are unable or unwilling to use the website directly, but still want to place orders. Orders are collected into an Excel spreadsheet and then manually added by using the site by an employee.
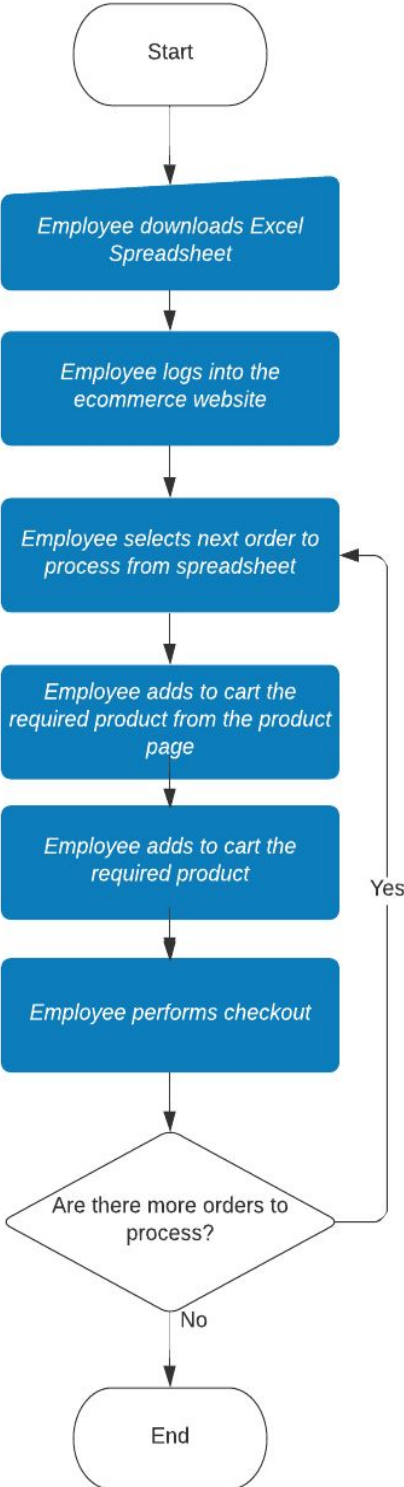
1. Each morning at 9am a Microsoft Excel spreadsheet that collects order requests is made available to the employee.
2. The employee downloads the spreadsheet
3. The employee manually logs into the website
4. The employee places one order for each row in the spreadsheet, filling the required information manually.

Systems involved

System	Used for	User role needed
Microsoft Excel	Collecting the orders, Used manually by the employee to get the data about orders.	The employee must have access to the shared drive.
Company ecommerce website example.com ____)	Placing orders according to the data provided.	The employee must have a user account on the site that allows to place unlimited orders.

Process flow

Here is a description of the process in the form of a flow chart:

Start

Employee downloads Excel Spreadsheet

Employee logs into the ecommerce website

Employee selects next order to process from spreadsheet

Employee adds to cart the required product from the product page

Employee adds to cart the required product

Yes

Employee performs checkout

Are there more orders to process?

No

End

Detailed steps

1. Employee downloads the excel file

The excel file can be found on the company shared drive, and it follows this structure:

Name	Item	Zip
John Doe	Sauce Labs Bolt T-Shirt	3695

2. Employee logs into the site

The url used by employees is: example.com
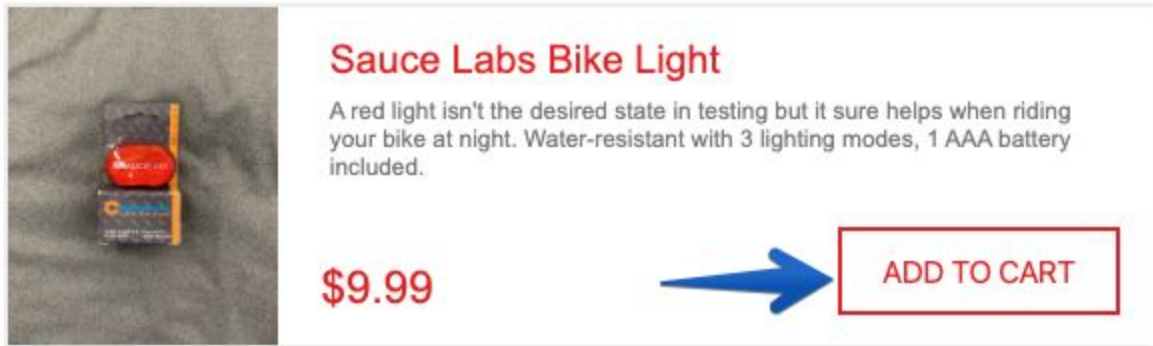
This is how the login interface looks like:

Employees are provided with personal user / password credentials.

3. Employee adds the required product to the shopping cart

After logging into the site, the employee finds the required product on the first line of the excel file and adds it to the shopping cart by clicking on the "Add to cart" button:

The shopping cart now shows that it contains one product:

4. Employee reviews the order and completes the checkout process

By clicking on the shopping cart icon, the employee navigates to the checkout page, where he/she can check that the product is the correct one, and then continue by clicking on the "Checkout" button:
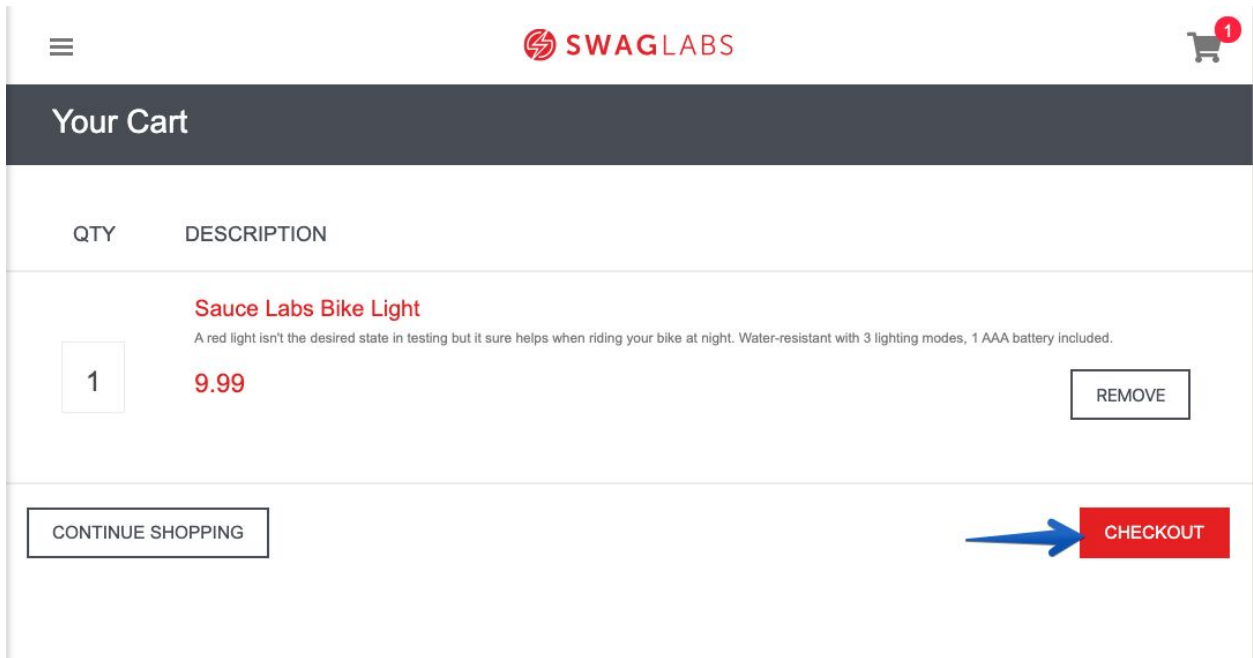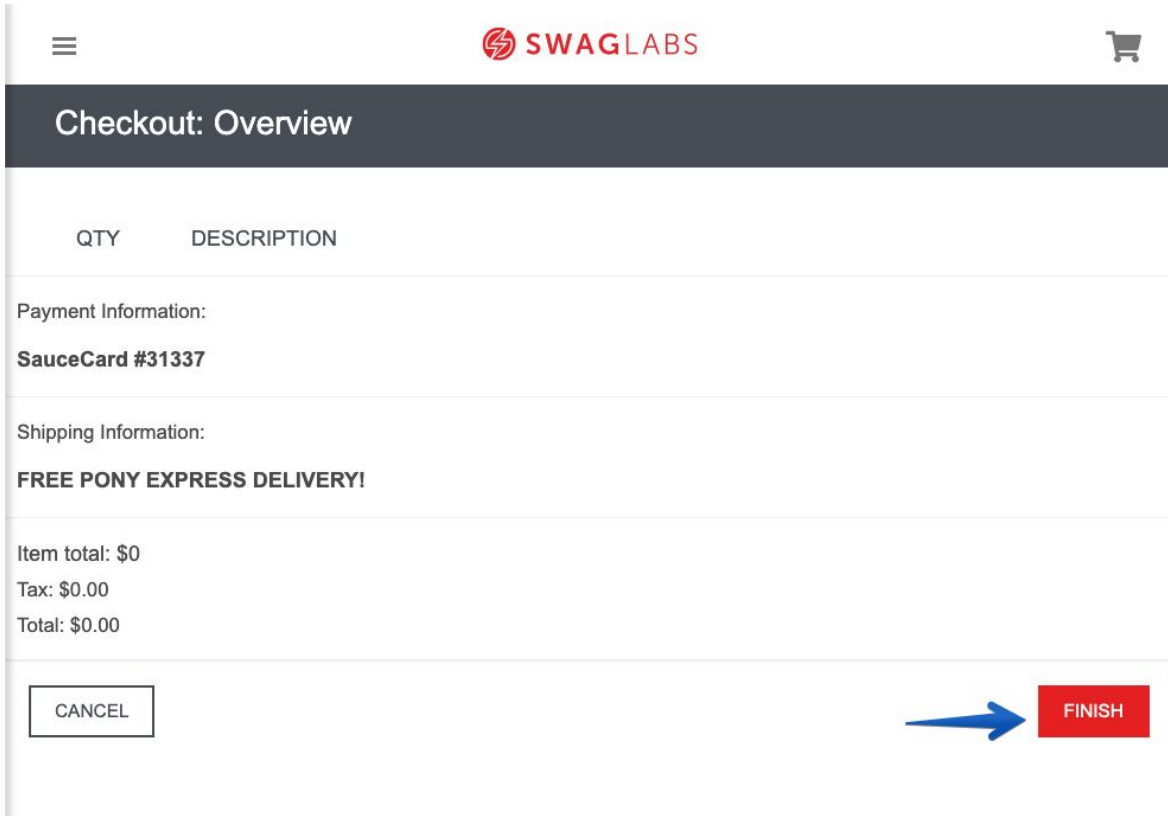
In the next page, the employee inserts the **First name**, **Last name** and **Zip code** of the customer, copy / pasting them from the Excel sheet, and clicks the "Continue" button:
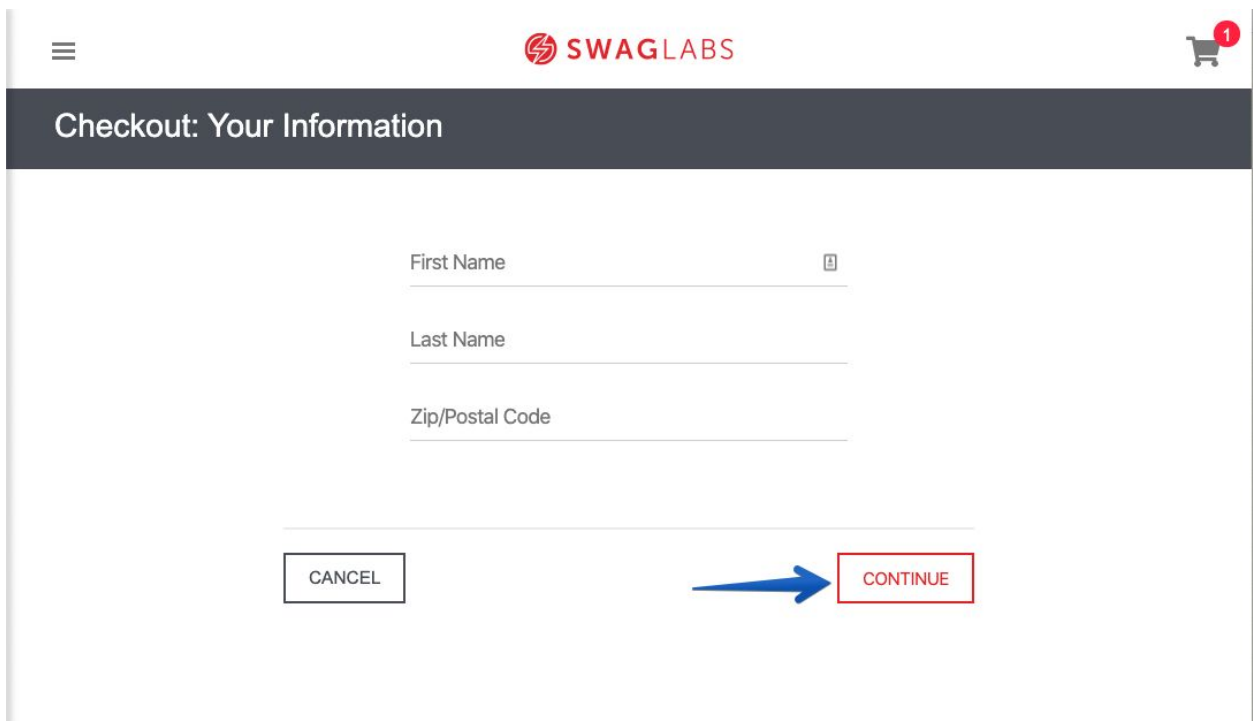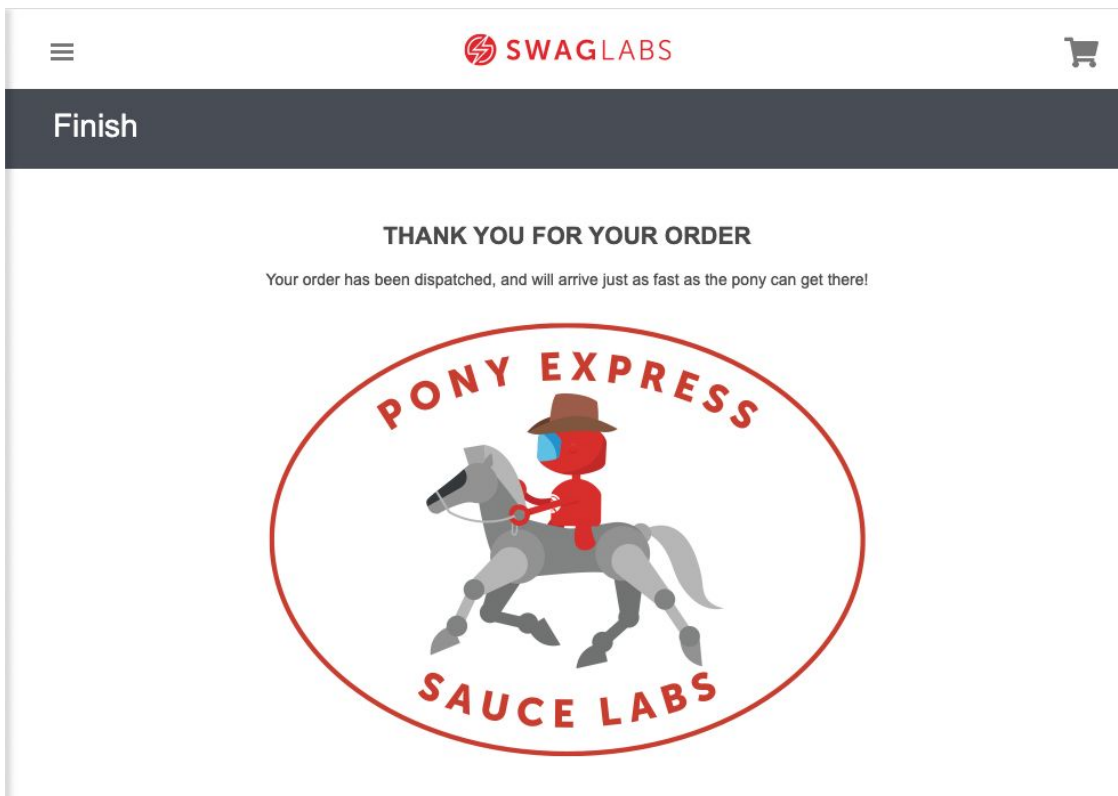

On the next page, the employee sees an overview of the order, and can complete the checkout by clicking on the "Finish" button:

After clicking on the "Finish" button, the employee is presented with a final success page.

This process is then repeated for all the orders that are present in the Excel file.

Possible exceptions

Exceptions are special cases and rules that can influence and even stop the smooth running of the process.

Logic Exceptions

Missing data

First name, last name and zip are all required to place an order. If an order is missing any of this information, the order is not processed.

Maximum phone orders a day reached

The business has decided to process not more than 10 phone orders a day, so even if there are more than 10, the employee will know not to process them.
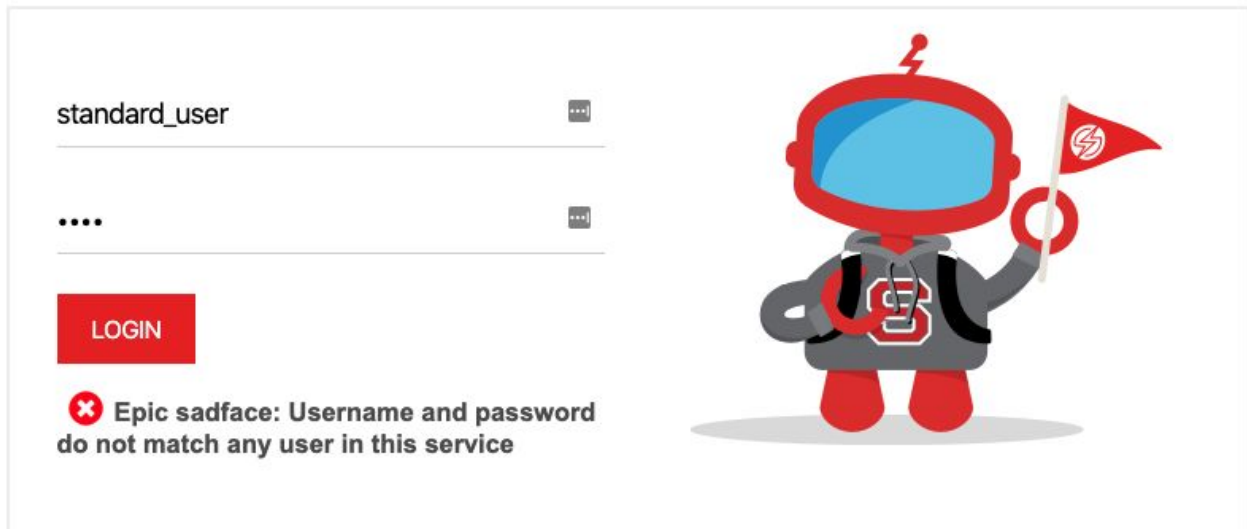
Zip code outside the continental United States

The business has decided not to fulfill orders outside of the continental United States. If the zip code represents Hawaii, for example, the order is not processed.

System Exceptions

Invalid credentials

If the user provides credentials that are not valid, the login is not successful and the process stops.

Locked user

After many unsuccessful login attempts, the user account is marked as locked, and no additional attempts are allowed. In this case, the intervention of an admin user is required to reset the user password and unblock the user.