

## e-Commerce Site and Contact Management System

*Coordinated Web Site and Back-Office System*

### BUSINESS NEED

An established, regional producer of premium food gifts needed to upgrade their principle business system to new, supportable technology. The new system was required to perform the functions of contact management, recording customer gift recipients, order entry, order processing, and order posting to the financial system.

A commerce enabled web site was also desired. The site would provide a catalog of gifts that could be purchased and sent to a single individual, or to multiple people. Registered customers needed to be able to choose from entries in their own gift recipient list. The lists needed to be customer entered and maintained, or entered and maintained by company personnel.

### DESIGN

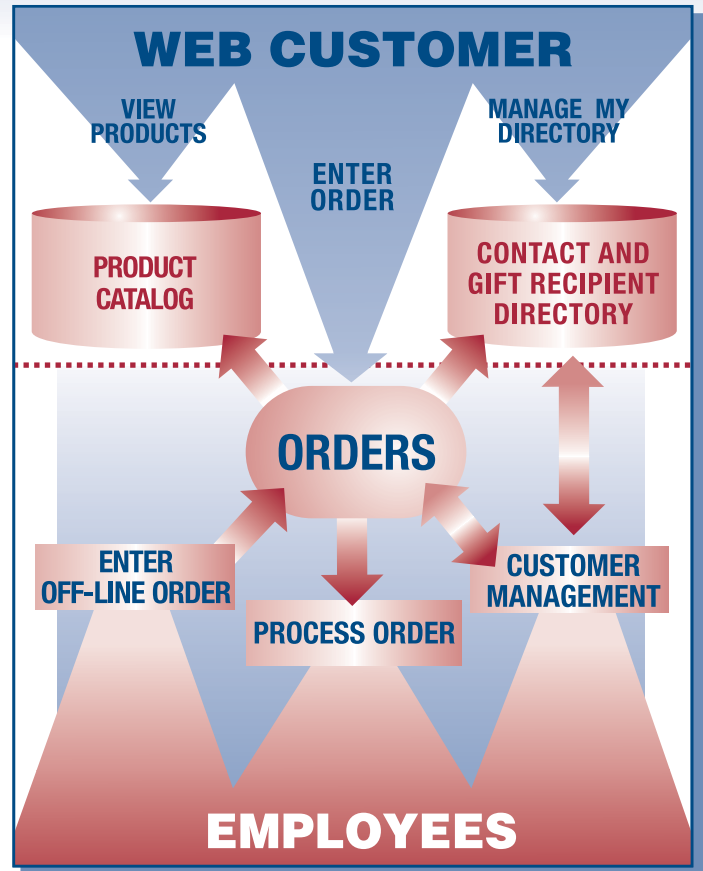
The design was based upon integrating the web and back-office applications into a single solution.

The first application would meet the needs of the office employees, and be designed as a client/server software package. The second application would meet the needs of customers, and be based on web technology. A common database management system would be shared between the two applications.

The web site design was based on a commercially available e-commerce software package customized to meet the client's business needs. A commercial package was desirable to minimize development time and enhance supportability.

### CONTACT MANAGEMENT FUNCTIONALITY

The features developed for the contact management application covered the typical capabilities of a name and address book plus unique features to support the day-to-day office workflow. The application is deployed as a shared, multi-user utility to enable collaboration between multiple groups. Contact notes and "tickler" data provide activity records relating to customer contacts by sales and support personnel.



Market segment and product interest information is tailored to meet the needs of the gift division, and other divisions within the company. Each contact record can be tagged with market data.

Mail merge functionality is integrated into the contact management package. A library of standard documents (letters, faxes, envelopes, labels) was produced. The merge functionality allows company personnel to generate a personalized standard document, with the application keeping track of when and who sent the document. Additionally, the application supports target market mailings by producing a list of those contacts that match desired market segment criteria, and then generating personalized letters for each contact.

Taking contact management one-step further, the application has the ability to enter and track orders. This capability is crucial for handling orders originating from channels other than the web. If orders come in from the e-commerce site, they too are recorded in the contact record, giving a consolidated view of order history regardless of channel.

Order fulfillment functions of contact management include the print out of proper package labels and note cards, and then posting the order to the financial system. The functions support printing multiple labels and note cards per order, since a single order can have many recipients. The consistent order handling design between web and non-web channels makes order processing simple and efficient.

#### **e-COMMERCE SITE FUNCTIONALITY**

Gift division products are available for purchase via the e-Commerce site. The on-line catalog contains all the standard features for a potential customer to make the buying decision, including pictures, descriptions and prices. The site has the capability to activate promotional concepts such as special pricing and related product categories.

Site visitors may choose to self-register or shop anonymously. Aside from typical registration benefits, a registered user may enter and maintain gift recipient lists. Since the product focus is "gifts", the customer is not the one who is the likely recipient of the ordered product (although they can be). Also, since the company focuses on business gifts, it is not unusual for customers to subdivide a single order in to multiple shipments, each sent to a different person.

Orders that are placed on the e-Commerce site are acknowledged by e-mail messages to order fulfillment personnel for processing.

#### **INTEGRATING BACK-OFFICE SYSTEMS**

Locating the web and database servers at the corporate office enabled the necessary integration between the systems.

#### **CHARTWELL I/T ROLE**

Chartwell I/T was the technical lead on the project from the beginning, and continues to support and enhance the systems. Chartwell I/T filled the project management, system and software architect, and software developer roles. Chartwell I/T also loaded initial catalog content, configured production servers and migrated data from the legacy system.

Besides Chartwell I/T's participation, the initial project team consisted of client resources to fill the roles of system manager and business experts. Other contractors provided web site graphics and layout advice, and assistance with financial system integration.

#### **TECHNOLOGY**

The e-Commerce system uses Microsoft® Site Server 3.0, Commerce Edition™ (SSCE), a middle-ware product that provides the core functionality for customer management, catalog structure, order handling and site usage analysis. SSCE runs on top of Windows 2000 Server™ running IIS 5.0. The SSCE Membership Directory, an LDAP-compliant data store, is used for authentication services. SSL encryption technology is also implemented.

The contact management application is written using Microsoft® Access 2000™ connecting to the SQL Server database.

Microsoft® SQL Server Database Management System is the primary database for the site, storing the schema used by the contact management application and the web site, and acting as the LDAP data store.

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