

Customer assessment checklist.

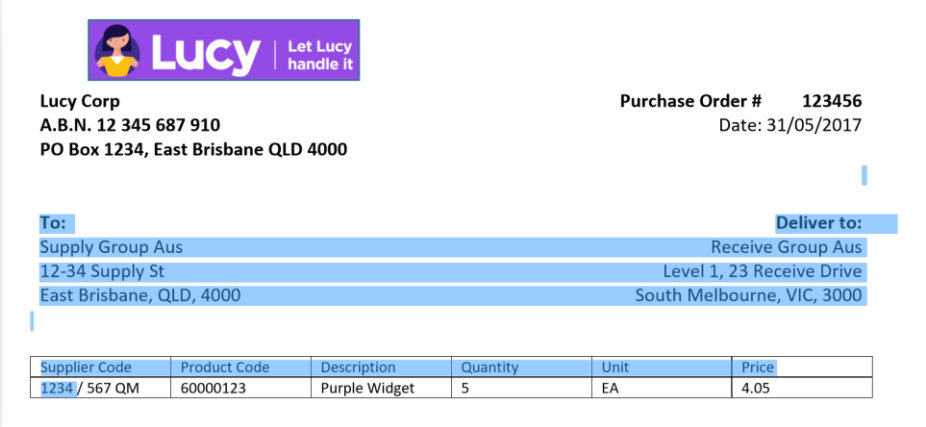
WHAT CAN LUCY HELP YOU WITH?

Lucy is here to help! Now it's time to think about the high volume or high line count purchase orders that you receive.

To determine the suitability of your orders, we need to understand how your customers (or as we like to call them, 'Trading Partners') send their purchase orders to you. Can they provide a Purchase Order in the format of a **machine readable PDF**?

In most instances, it will be hard to determine if a PDF is machine readable by using a visual assessment, but the following key points can help.

- **Is it an original PDF document?** - Scans, faxes or photocopies cannot be mapped by Lucy.
- **Does the data match?** It is best to start with the customers who use pricing and product codes that match what is in your ERP system.
- **Is the format consistent?** You only need to create 1 map per trading partner
- **Can you block copy & paste the lines of the Purchase Order?** - As demonstrated below, attempt to highlight, copy and paste some data from the PDF into another document to determine this.



The screenshot shows a Purchase Order document with the following details:

Lucy Corp
A.B.N. 12 345 687 910
PO Box 1234, East Brisbane QLD 4000

Purchase Order # 123456
Date: 31/05/2017

To: Supply Group Aus
12-34 Supply St
East Brisbane, QLD, 4000

Deliver to: Receive Group Aus
Level 1, 23 Receive Drive
South Melbourne, VIC, 3000

Supplier Code	Product Code	Description	Quantity	Unit	Price
1234 / 567 QM	60000123	Purple Widget	5	EA	4.05

SIMPLE. EASY, INTEGRATION

Use the following Assessment Checklist to help you decide which Trading Partners to Go Live with. Starting with Low Touch purchase orders will ensure seamless integration.

	Low Touch (the ideal Purchase Order)	Mid Touch (some intervention required)	High Touch (corrections required)	No dice (manual order entry required)
Purchase Order Format	Customer sends through original PDF purchase orders	Customer sends through original PDF purchase orders	Customer sends through a purchase order that requires conversion to PDF	Customer sends through a scan of an order they drew on a napkin
Header Data	Unique Purchase Order number Consistent data positioning across multiple orders	Unique Purchase Order number Purchase order number and other header data moves across the page, order to order.	Duplicated Purchase Order number Purchase order number and other header data moves across the page, order to order.	No Purchase Order Number found
Line Data	Quantity for each product found on line Consistent data positioning across multiple orders	Quantity for each product with extra quantities requested for future dates in line notes Line data columns and rows change position across some orders	Quantity for some products found on line but some have no quantity Line data columns and rows change position across most orders	No Quantity found on any line
Product Codes	Product Codes match what is in your ERP* database for that customer	Most of the Product Codes match but some are wrong	None of the Product Codes match	No Product Code, SKU, Model Description or Product Identifier found

*ERP – Enterprise Resource Planning software i.e. Pronto, Dynamics 365 etc...

A GOOD EXAMPLE



The Music Store

The Music Store
1234 Fake Street
Sydney, NSW, 2000

ABN: 123456789
Phone: 07 1234 5678
Web: themusicstore.com

PURCHASE ORDER 44251

Order Date: 29-AUG-17

Supplier:
Audio Supply
5789 Real Street
Melbourne, VIC 3000

Phone: 03 1234 5678

Deliver To:
The Music Store
1234 Fake Street
Sydney, NSW 2000

Warehouse	Account Code	Currency	Order Terms	Required By
50	TMS	AUD		02-SEP-17

Item Code	Supplier Item Code	Item Description	Quantity	UOM	Unit Cost	Line Total
DBX-231S	DBX-231S	816 RRP-30-5 210.99	1	EACH	210.99	210.99
DBX-DRIVERACKPA2	DBX-DRIVERACKPA2	816 RRP-30-5 543.49	1	EACH	543.49	543.49
DBX-GORACK	DBX-GORACK	816 RRP-30-5 120.3	1	EACH	120.30	120.30
DBX-RTAM	DBX-RTA-M	816 RRP-30-5 108.21	1	EACH	108.21	108.21
FUR-M10XE	FUR-M-10XE	816 RRP-30-5 120.30	1	EACH	120.30	120.30
JBL-EON810	JBL-EON810	716 RRP-33.5 440.71	1	EACH	440.71	440.71
JBL-EON815	JBL-EON815	716 RRP-33.5 543.49	2	EACH	543.49	1,086.98
JBL-S-LSR305	JBL-LSR305	716 RRP-33.5 168.67	4	EACH	168.67	674.68
SHU-BETA-58A	SHR-BETA58A	816 RRP-30-10 199.88	1	EACH	199.88	199.88
SHU-BLX24SM58K14	SHR-BLX24S58K14	1016 RRP-30-5 362.12	1	EACH	362.12	362.12
SHU-HPASCA1	SHR-HPASCA1	216 RRP-30-5 24.78	1	EACH	24.78	24.78
SHU-M447	SHR-M447	1216 RRP-30-5 90.08	3	EACH	90.08	270.24
SHU-MVL	SHR-MVL	816 RRP-30-5 77.99	1	EACH	77.99	77.99
SHU-N447	SHR-N447	1216 RRP-30-5 44.13	12	EACH	44.13	529.66
SHU-PGA48XLR	SHR-PGA48XLR	816 RRP-30-10 45.25	1	EACH	45.25	45.25
SHU-PGA56XLR	SHR-PGA56XLR	816 RRP-30-10 85.34	1	EACH	85.34	85.34
SHU-SB902	SHR-SB902	216 RRP-30-5 46.54	3	EACH	46.54	139.62
SHU-SE215BK	SHR-SE215-BK	716 RRP-33.5 99.75	1	EACH	99.75	99.75
SHU-SE215CL	SHR-SE215-CL	716 RRP-33.5 99.75	3	EACH	99.75	299.25
SHU-SE215SE	SHR-SE215SPE-BLU	716 RRP-33.5 111.84	1	EACH	111.84	111.84
SHU-SE425CLR	SHR-SE425-CL	716 RRP-33.5 238.8	1	EACH	238.80	238.80
SHU-SE535CLR	SHR-SE535-CL	716 RRP-33.5 420.16	1	EACH	420.16	420.16
SHU-SLX24B87A-L4	SHR-SLX24B87AL4	716 RRP-33.5 839.71	1	EACH	839.71	839.71
SHU-SM57	SHR-SM57	816 RRP-30-10 142.61	4	EACH	142.61	570.44
SHU-SM58	SHR-SM58	816 RRP-30-10 142.61	4	EACH	142.61	570.44
SHU-SM7B	SHR-SM7B	816 RRP-30-10 491.97	1	EACH	491.97	491.97
SHU-WHITELABEL	SHR-WHITELABEL	1216 RRP-30-5 108.21	2	EACH	108.21	216.42

Delivery Instructions:

Sub Total	8,899.22
GST	889.93
Total Inc. GST	9,789.15

SEND THEM ON IN

To help us with our assessment, please provide us with **6 x Purchase Order** examples from your **Top 5 customers** that suit the above criteria and we will aim to provide you with feedback as soon as we can.

Please zip and send your PO's to support@letlucy.com