

# Customer assessment checklist.

## IS LUCY RIGHT FOR YOUR BUSINESS?

**By now you've attended a Lucy webinar or demonstration and might be asking yourself "will Lucy work for my business?". It's an important question to ask before starting a trial. The purpose of this document is to help Lucy understand whether she's right for your business.**

**So let's get started.....**

Lucy needs to understand how your customers (or as we like to call them, 'Trading Partners') send their purchase orders to you. In some instances, it can be tricky to determine if a **Trading Partners Purchase Orders** are going to be a good candidate for trialling Lucy but the following key points can help.

- **Is the order an original PDF document?** Scans, faxes or photocopies cannot be mapped by Lucy.
- **Does the data match?** It's best to start with the customers who use pricing and product codes that match what's in your ERP (back end system e.g. PRONTO, MS Dynamics).
- **Is the format consistent?** You only need to create 1 map per trading partner, provided their orders are sent in the same format each time.
- **Can you block copy & paste the lines of the Purchase Order?** Attempt to highlight, copy and paste some data from the PDF into another document. If you can, the PDF is probably machine-readable.

## SIMPLE. EASY, INTEGRATION

The following Assessment Checklist will help guide which Trading Partners to focus on. Starting with Low Touch purchase orders will provide early ROI\*.

	<b>Low Touch</b> (the ideal Purchase Order)	<b>Mid Touch</b> (some intervention required)	<b>High Touch</b> (corrections required)	<b>No dice</b> (manual order entry required)
<b>Purchase Order Format</b>	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
<b>Header Data</b>	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
<b>Line Data</b>	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
<b>Product Codes</b>	Product Codes match what is in your ERP* system	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, Microsoft Dynamics 365 etc...

\*ROI – Return on Investment

# 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:**

<b>Sub Total</b>	8,899.22
<b>G ST</b>	889.93
<b>Total Inc. GST</b>	9,789.15

## **SEND THEM ON IN**

To help us with our assessment, please provide us with **6 x Purchase Order** (Low or Mid Touch) examples from your **Top 5 customers** and we will provide feedback on whether Lucy can handle it.

**Please zip and email your PO's to [support@letlucy.com](mailto:support@letlucy.com)**