

Simplysent

Final Report

4.0

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Revision History

Date	Description	Author	Comments
02-06-2015	Version 1	Daniel Golman	First Revision
02-24-2015	Version 2	Daniel Golman	Design Revision
3-11-2015	Version 3	Daniel Golman	Implementation Revision
3-25-2015	Version 4	Daniel Golman	Clearer section for Implementation Report and Prototyping report
4-8-2015	Version 5	Daniel Golman	Refinement Report I
4-16-2015	Version 6	Daniel Golman	Refinement Report II
4-26-2015	Version 7	Daniel Golman	Testing Report
5-5-2015	Version 8	Daniel Golman	Final Report

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1. Executive Summary

Developing business relationships is a constant struggle as people are extremely busy with their personal and professional life. You might have someone as a connection on LinkedIn or know a potential customer at a company, but developing these relationships becomes a constant struggle and time sink. However, it doesn't have to be. There are tons of opportunities to show people you're thinking of them with a thoughtful gift. Someone gets promoted, changes jobs, has a baby, gets married, hits a 3/5/10 year milestone at their company, you closed a deal, you get a business referral or it's administration professionals day. Unfortunately there is currently no easy way to remember or easily send a thoughtful business gift to one or dozens of people. Furthermore, no gifting site even connects to people's contacts in CRM systems. Even if you're part of the minority who has the time or has an assistant to help, almost no one wants to look through 100 types of boxes of chocolates or 50 varieties of red wine. People are busy and need help.

SimplySent is an easy way for busy professionals to strengthen their business relationships by sending thoughtful gifts in less time and with less hassle. We connect to various contact managers (salesforce, sugarcrm, highrise and gmail) so people can use their existing contacts in these systems when sending gifts to one or dozens of people. The site also has a dashboard feed of Calendar events, LinkedIn updates and CRM leads/deal closings so you never forget an important event for people in your network. Based on these updates, you can send a gift today, or schedule one for the future. In addition, there is a limited selection of curated items so people can easily get in, and get out. We are working with a large wine & champagne distributor in Napa, a few high end chocolate stores throughout the U.S. and a boutique baby clothing company. The goal is to create a scalable network of curated offerings throughout the world and a fully integrated platform that takes care of remembering countless events going on in your network.

1.1 Purpose

To satisfy a need in the professional market and take advantage of a niche market to make money.

1.2 Scope

The website www.simplysent.com will provide a service for professionals in the work force to send ecards and gifts (e.g., chocolates, wine and baby clothes).

1.3 Overview

The rest of this document provides a deeper look into the product being built. Some of the sections will discuss product features, specific requirements and user analysis.

1.4 Product Perspective

The current competition for Simplysent.com is companies like mouth.com and paperlesspost.com, both in the ecommerce industry of gifting and ecards.

1.5 Product Functions

CRM/LinkedIn integration, fully functioning ecommerce flow (i.e., shopping cart, credit card processing and checkout), ability to create occasions for future gifts, recipient address verification, vendor onboarding and management, payment setup with stripe (using their marketplace payment technology)

1.6 User Characteristics

Business professionals ranging from ages 25 - 45

2. User's Manual

- Track network updates through LinkedIn (people change jobs, and get promoted), new leads or deal closing from your CRM and a business calendar update (admin professional day, winter holidays, small business Saturday, etc.).
- Use your existing contacts from your CRM system (or our system can email the recipient to put in their preferred address)
- Send something today, or schedule reminders for any occasion in the future; you can import existing lists from your CRM or create new lists of recipients for future use
- Send to one or dozens of people within the same amount of time
- Unique network of specialty food retailers (i.e. chocolate & desert retailers) throughout the U.S. which provide a quality product offering and close proximity to recipients for quick delivery turnaround
- Connected to a wine distributor in Napa Valley and wines selected by in house curators (at various price points) to make sending wine extremely easy
- Full payment integration and ability to save credit card information for quick checkout time (bank level security of data)

3. Developer's Manual

3.1 User Interface

This is a link to an Invision storyboard of our entire frontend of our site

<http://invis.io/Q626BMCKA>

pass: simplysent15

3.2 Functional Requirements

3.2.1 Login and Signup

Users and vendors need to be able to register their accounts and to log in after registration.

3.2.2 Contact management integration

After users register they need to be able to integrate their contact management systems so they can select which contacts to send their gifts to.

3.2.3 Product (Gift) catalog

Users need to be able to select gifts to send to their contacts.

3.2.4 Schedule future occasions

Users need to be able to schedule reoccurring, future occasions so that they can send gifts yearly.

3.2.5 Send gifts

Users need to be able to send the gifts that they select from the product category.

3.2.6 Send ecards

Users need to be able to send ecards to their contacts so that they are notified about their gift.

3.2.7 Credit card processing

Our site needs to support the ability to process credit cards and charge users for their purchases.

3.2.8 Shipping products and tracking numbers

Vendors need to be able to receive orders, ship products, and enter tracking numbers to receive their payments.

3.2.9 Approve vendors

Admins need to be able to approve vendors that are applying to sell products.

3.2.10 Post products

Vendors need to be able to post products so that users can buy them.

3.2.11 Verifiy Bank accounts

Vendors need to be able to enter their bank account information so that they receive payments.

3.2.12 Select recipients

Users need to be able to select their contacts to send their gift to.

3.2.13 Address verification

Users need to be able to send address verification links to contacts so that they can enter their preferred shipping address.

3.2.14 Coupon codes

Vendors need a way to promote the site and their products so they can generate a coupon code and send it to users for the users to get discounts on products.

3.3 Data Flow Diagrams (DFD)

3.3.1 Beta Invite Logic

These two links are diagrams of the invite beta logic we are implementing and launching on production in the next week

http://s30.postimg.org/of4w53bht/Invite_1_jpg_AWSAccess_Key_Id_AKIAI7_NUHQY_ARXR2_GGCQ.jpg

Notes: 5/100 means the current beta position they are in the line out of 100 people. Social Media / Exclusive invite is our referral program for users to share their referral code via facebook and Twitter.

http://s30.postimg.org/7swz6ve9d/Invite_2_jpg_AWSAccess_Key_Id_AKIAI7_NUHQY_ARXR2_GGCQ.jpg

Notes: 0/100 means that they are next to be let into the beta. Refer to above for meaning of sharing.

A. Implementation Report

Gantt Chart – Timeline (phases/steps)

<https://docs.google.com/a/simplysent.com/spreadsheets/d/1JCpUVpqV8m0nyrtlTZnRRzS2ikxZIIUGk5dXTVvfvVU/edit#gid=0>

Programming Languages

Ruby on Rails, CSS/SASS, HAML and jQuery

Tools/Libraries employed

Live reload, OAuth, Gmail API, and LinkedIn API

Code Repository Plans

Github with a feature-branch flow

B. Prototyping Report

Here is a link to our designs for our final project. Some of these have already been coded and implemented into www.simplysent.com where you can see the beta invite logic referenced in section 3.1.1.

<http://invis.io/Q626BMCKA>

pass: simplysent15

Here is a link to our development mental map. This shows all the logic and business logic put into the site and the development work I have done on the backend.

<https://www.evernote.com/shard/s96/sh/cdfc32e5-858d-47ea-9e07-2f69a757d4bd/96df2b5cbd3a2630fe395f46a11e9d3d>

C. Refinement Report I

Here is a link to the development tasks since the prototype report. This was last updated April 12th from the previous version from April 1st. The text in red are the items that are incomplete or bugs

<https://www.evernote.com/shard/s96/sh/02d7793b-d672-46fe-9e36-b2b0ae02fc04/a52c59fd8aaf2f68733208eca33f11f7>

D. Refinement Report II

Shared the link through google docs with Dr. Fox to the development tasks (test suite) since the refinement report I. I worked on writing automated tests for the invite beta logic. This includes granting a user access after they have gone through the extended beta wait period.

4. Lessons Learned

E. Testing Report

Picking up where I left off in section D, Refinement Report II, where I started to write automated tests for the beta invite logic, this time around I started testing the checkout process. The checkout process of our site embodies the entire functionality of the backend for our eCommerce platform. I decided to go with acceptance/integration tests instead of unit tests because I wanted to simulate the whole process of going through and selecting a product, searching for recipients, entering credit card information, and checking if the appropriate emails were sent to the recipient and user. The code for this whole process is as follows:

```
feature 'User goes through checkout process' do
  scenario 'product creation + sign in + select product + manual contact' do
    admin = FactoryGirl.create(:admin)
```

```
    category = create(:category)
    product = create(:product)
```

```
user = FactoryGirl.create(:user)
login_as(user, :scope => :user)
```

```
#Select gift/product
visit "/products/#{product.id}"
```

```
#click on not working
click_button 'Send as a Gift'
```

```
#Add contact
click_on 'manual'
```

```
fill_in 'first_name', with: "Daniel"
fill_in 'last_name', with: "Golman"
fill_in 'email', with: "dgolman@vt.edu"
```

```
click_on 'Add Contact'
```

```
#Checkout
visit '/checkout/cart'
```

```
click_on 'add-new-payment-method'
```

```
fill_in 'name', with: "Daniel Golman"
fill_in 'street_address', with: "42247 st huberts place"
fill_in 'city', with: "Chantilly"
fill_in 'state', with: "Va"
fill_in 'zipcode', with: "20152"
```

```
click_on 'Process Order'
```

```
expect(page).to have_content('Initiated')
```

```
#Address verification
contact = Contact.all.last
```

```
visit address_verification_path(id: contact.token)
```

```
fill_in 'contact_street_address', with: "42247 st huberts place"
fill_in 'contact_locality', with: "Chantilly"
fill_in 'contact_region', with: "Va"
fill_in 'contact_postal_code', with: "20152"
find("option[value='VA']").click
```

```
click_on 'Ship to this address'
```



```
expect(page).to have_content('42247 St Huberts Pl Chantilly VA 20152-4115')

click_on 'Ship to this address'

expect(page).to have_content('Thank you for entering your address. Your gift is now
on its way!')
order = Order.all.last

visit "/orders/#{order.id}"
expect(page).to have_content('Address Ready')

end

end
```

This is the testing code I wrote in Ruby on Rails' testing framework called RSpec and the javascript browser emulator I used called Capybara. During the process of writing this test I came across some problems with emulating an AJAX request from Capybara. To solve this problem I had to do a lot of reading in the document/manual for Capybara on Github. Other problems I came across were flaws in the logic I had previously written in the backend. Testing the whole checkout process led me to find these flaws and fix them before we start letting users into to test our live site.