

# Welcome to Fluent Commerce

## Customer Handbook

2024 Edition



# A warm Fluent Commerce welcome.

## You're in good company!

As a new customer, you're now part of a community that includes some of the world's leading brands. We're excited to welcome you into our network of customers and look forward to collaborating together.

Here at Fluent Commerce, we offer a cloud-native and highly flexible Distributed Order Management (DOM) System. Our mission is to :

- Set the global standard for dynamic inventory availability and order management
- Power customer experiences that ignite immediate growth across diverse consumer industries
- Lead through innovation in supply chain execution technology

### And we are committed to your success.

This Customer Handbook will introduce you to our organization and services to help you get started—quickly.

You should have already been introduced to your Customer Success Managers, who will be your main point of contact. They will be able to provide strategic insights, help you access product information, as well as any Fluent Commerce services you may need.

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# Getting Started with **Fluent Commerce**

## The key information hub:

### **Our documentation**

Our documentation hub is the most complete source of information on Fluent products, services and company communications.

It's your go-to resource when questions arise.

Your selected partner and other third parties can also be granted access to it once an NDA has been signed.

Reach out to your Customer Success representative should you need a third party to be granted access.

To register, please visit:

<https://docs.fluentcommerce.com/>

and use your company email address when signing up.

## Links to get started :

- [Essential Knowledge](#)
  - Order Management Experience (OMX)
  - SDKs and the Workflow Engine
  - Modules
- [Platform Usage Limits](#)
- [Release Notes](#)

## Fluent Commerce support

As part of your licence contract, Fluent Commerce provides 24/7 core platform support. Your selected partner will support on custom code and integration needs.

Your Customer Success representative will provide you access to the [Fluent support portal](#) prior to your project go-live.

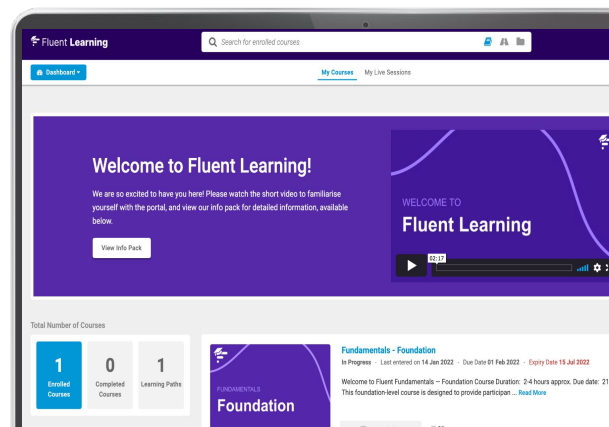
Detail on how to raise a platform support ticket, SLAs and other information can be found on [our documentation](#) hub.

## Get More Value with **Fluent Training**

Fluent Commerce offers a variety of training options to ensure that our partners and customers are enabled to successfully implement and run a Fluent Order Management project.

The training programmes are role based and self paced learning paths. All of which are available on the '[Fluent Learning](#)' platform.

All information are available [here](#).



# Driving Success with **Fluent Expert Services**

The Fluent Commerce Expert Services team really are **experts in Fluent Order Management!** Expert Services are there to help realise your vision, making the most of Fluent Order Management from the discovery phase through to project go-live.

A key role Expert Services plays is to ensure:

- The project leverages the platform as much as possible
- Best practices are followed
- Assist with questions
- Enable the implementations teams
- Reduce risk of project delays

The Expert Services team are up-to-date on on the latest product developments and how customers across the globe are using Fluent Order Management. Their expertise can help you get more out of the rich features, functionality, and extensible platform.

With a collaborative approach, we can work with you and your implementation partner to validate choices, monitor progress and review developments.

## Expert Services Packages

### Discovery and Implementation

Designed to assist during the discovery and the implementation phases with technical & functional reviews to advise on best practices.

### Go-Live Readiness

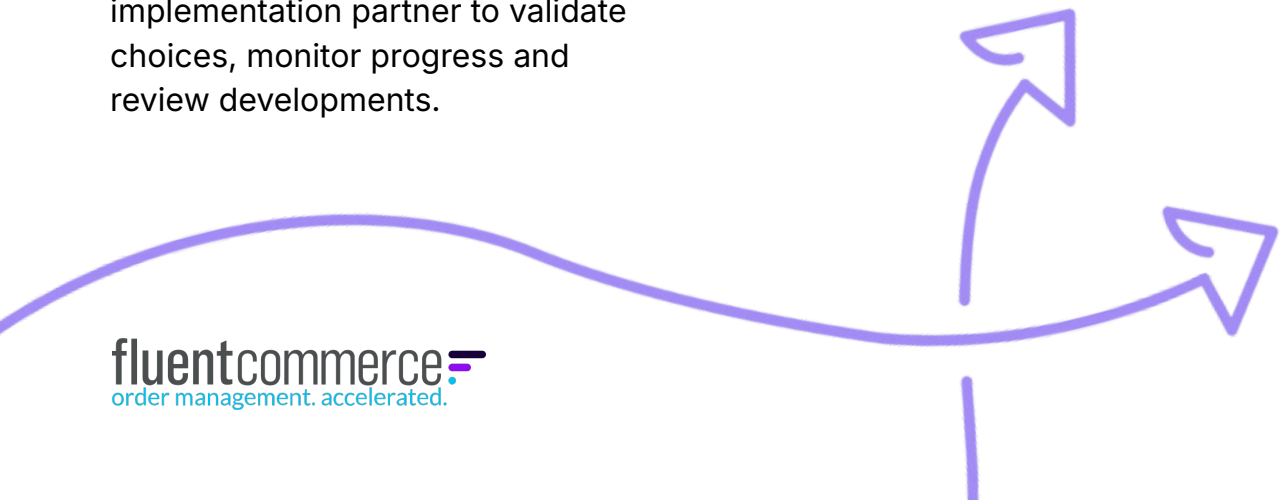
Covers for a requisite exercise designed to support a successful go-live, with multiple checkpoints (a report is issued and can be run 2-3 times to ensure production is in state fit)

### Annual health check

Run a global review of all platform areas, making sure platform stays up to date and optimized. If relevant, additional platform area can be recommended to increase product adoption.

### Performance testing

Provides guidance and detailed platform metrics during performance tests. Can also support for more complex problem solving or look for optimizations.



# Key Players: Customer, Partner, Fluent Commerce

## Customer

Defines the business, technical and functional requirements. Reviews and signs off on specification documents. Test plans, collaborates on user guide and customer team enablement

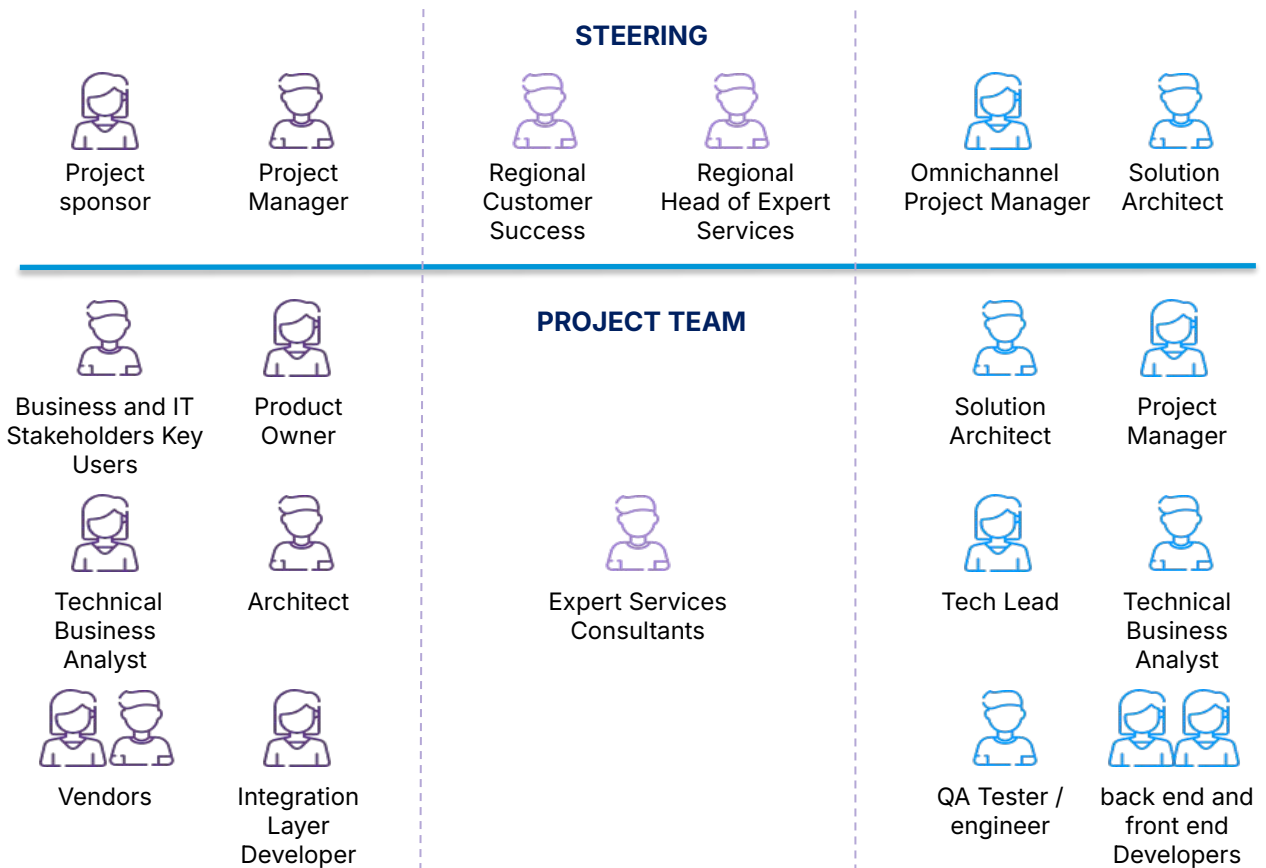
## Fluent Commerce

Fluent teams are here to ensure that you have access to subject-matter experts during your project, platform support once live, and roadmap visibility for enhancements

## Implementation Partner

Your implementation partner will configure and customize code to your business needs. You and your partner are responsible for the ongoing maintenance and any additional enhancements

### Example of Team Structure:



### What's the role of Customer Success

Customer Success Managers are committed to your success and will make sure your business benefit from all the capabilities of the Fluent Order Management platform.

Their role is covering: central point of contact for any request, share strategic direction and product roadmap, facilitate access to support & enablement, animate customer community and tracking of key business KPI's

*NB. While Customer Success will make sure you're happy and successful, it will not replace your partner doing project management or running ticketing review*

# Tips for a Successful Project Launch

Projects move quickly. We are here to ensure you unlock the full potential from Fluent Order Management, by providing you and your partner guidance, expertise and best practice. Here are our top tips for a successful implementation:

## Scope and timeline

It's critical to define the end goal and to put milestones in place to achieve this. A project scheduled into multiple phases significantly reduces the risk of extended timelines and budgets.

## Project Phases and Build

Build in small and simple blocks of logics to allow more flexibility and extensibility. Phased rollouts are proven to deliver faster go to market time and prioritization of your business objectives.

## Teams

The implementation partner teams are selected for their training and experience.

They will become the owner of the implementation and play a key role in your project success and post go live system maintainability and optimisation. As such the partnership should be approached as a long lasting one, where the partner will maintain knowledge and understanding of your specific Fluent Order Management implementation.

## Minimise Change Requests

More changes will have more impact on timeline and budget. It seems obvious but when a change is suggested, really define how critical it is to be included in the current phase.

## Well documented implementation

Keep your high-level designs, solution specifications and workflows well documented. As this is a critical aspect for your partner to support your application and enhancements.

## Demo and User Guide

Once each phase is complete and tested, your partner can help you build your Fluent User Guide and incorporate Fluent Order Management into your processes. Demo(s) can also be organized by the partner to see the completed module in the UI.

We strongly recommend to conduct regular demos at the end of each development sprint; or depending on the Agile methodology used, a demo of each completed Program Increment. This will provide continuous visibility on progress and elicit feedback by the business stakeholders as early as possible.

# More Tips for a Successful Project Launch

## Train the trainer

Make sure to discuss with your partner a training session on your custom solution for your teams. This should be included into your project schedule and lead by your selected partner.

## Train a Champion

We recommend creating an internal champion (or two!), someone who knows how Fluent Order Management works by going through our training program and has extensive knowledge of your implementation and can therefore support a wide range of teams internally.

## Environment Set-Up & Process

We will provision you with the required Sandbox and Production environments aligned to your license agreement. A proper lead time of two weeks needs to be provided to the Fluent team for setup purposes.

Credentials will then be provided to access your environment. Please ensure that the access to your environments is shared with your implementation partner, so they can complete the initial setup and configuration of your account.

## Sandbox environment

The Sandbox is suitable for development and functional testing. Multiple retailers can also be created under the sandbox account to support the multiple streams of activities such as Development and QA activities. **Note: Sandbox does not accommodate load processing or load testing.**

## Production environment

Your Production environment is provisioned at the start of UAT or on the agreed date in your licence contract. Please ensure that your Expert Services Consultant is kept updated on your timelines.

## Performance testing environment

Performance testing is recommended to understand how your custom implementation will manage your PEAK volumes. A performance testing environment can be provisioned upon request. Please note this is an additional commercial requirement and lead time of 4 weeks needs to be provided to the Fluent team. Your Customer Success Manager will be able to assist you through the process.



# Guidance for multi-tenant environment

## Multi-tenant environment key principles

In a multi-tenancy environment, multiple customers share the same environment.

The distinction between the customers is achieved during application design, thus customers do not share or see each other's data.

## Platform limits

You can find all information about platform limits on our documentation portal [here](#).

Our team is monitoring in real time the multi-tenants environment to ensure high performance for all customers.

## Production Accounts

The Production Environment is designed to manage customer's peak loads and is therefore scaled to much higher levels than Sandbox.

Fluent Commerce teams continuously monitor, with both automated alerts and manual data review, the activity within this environment to ensure there is enough headroom for our customers to grow.

On-top of our proactive monitoring, the environment will automatically scale to manage sudden and non-forecast increases in volumes to maintain consistent performance levels.

## Sandbox Accounts

Our sandbox environments are scaled to a significantly lower level than our production environments as they do not need to manage large loads of live data.

The sandbox environment will auto scale if there is increased traffic on the environment but not to the levels or at the speed of a production environment, meaning it is not an environment you can run performance testing in. Our best practice for Sandbox would be to load the minimum amount of data required.

Customers who consistently exceed our sandbox limits in a multi-tenant can have restrictions imposed on their activity to reduce the impact on the environment.

## Performance Testing

The purpose of performance testing is to ensure that your implementation is robust enough to meet the demands of your business during its busiest times. Whether that is ensuring that inventory is updated fast enough or orders are processed quick enough, it's important that **your organisation** determines what your benchmarks are.

If you would like to run performance testing, we offer a dedicated performance environment. Here you can run load testing on your implementation and ensure it is optimised to meet your business needs.



# Fluent Commerce Community

## Advisory Community

You're now part of the Fluent Commerce Customer Community. This is a unique and exciting opportunity to bring peers and senior leadership together to:

- Share best practices and learnings
- Provide feedback on Fluent Order Management
- Gain visibility into our strategy and vision
- Develop innovations and future collaborations

We are fortunate to have amazing customers in all corners of the Globe and to make our Customer Advisory Community accessible, we regionalise these activities.

To get involved, please speak with your Customer Success Manager who can share the full details and invitation with you.

Our community is aimed towards the innovators who champion Order Management within their organisation. We want to bring decision makers together who want to make a difference and have a voice on the future.

## Let's meet soon

Speak to your Customer Success Manager to find out about the upcoming events.

## Sharing your success

We encourage you to share your successes and challenges with us. As a flexible platform, we are able to adapt to most challenges and come up with a solution that fits your needs.

We want to hear about your vision, roadmaps and beyond. And of course, your wins! We would be happy to turn your win into a use case that is co-branded and marketed via Fluent Commerce's channel, promoting your brand and what we have accomplished together.

Your Customer Success team is here to help you on your journey and will make sure you're always aware of our latest news, such as product releases, roadmap updates and events.

We encourage you to let us know about your ideas and proposals to help us better serve you.

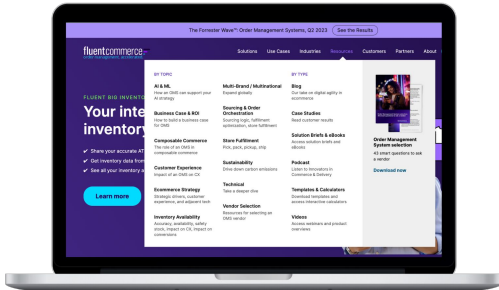
As the community of Fluent Commerce customers is growing, we want you to know that you're part of this network.

We can't wait to work with you!



# Keep up to date on **Fluent Commerce**

Visit **website** for latest industry resources



Live and on-demand **webinars**



Mark your calendars for key **events**



Listen to **Innovators in Delivery & Commerce** podcast



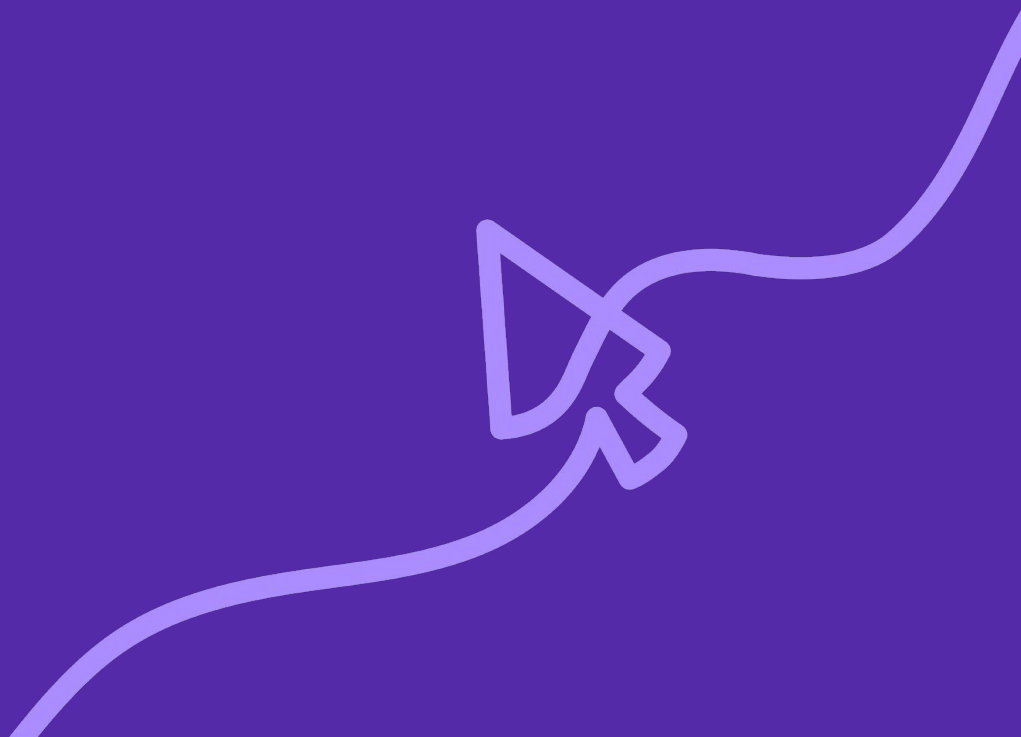
## Case Studies



Follow us on **socials**



# Appendix



# Expert Services Packages (1/2)

## Discovery and Implementation Packages

Designed to assist during the discovery and the implementation phases for Fluent Order Management.

From as early as the discovery phase, the Expert Services team works alongside your partner providing consulting and guidance to ensure that the implementation takes the right direction as well as to ensure validation of the solution approach against the Fluent value proposition.

During the project implementation, Expert Services conducts technical and functional reviews and advice on best practices.

The involvement of the Expert Services' consultants will be throughout the sprint delivery.

Typical tasks provided are:

- Integration mapping support and design consulting
- Support, guidance and review of workflow design per domain (Order, Inventory, etc.)
  - Includes guidance on rulesets, rules, states, user actions, etc.

- guidance on rule designs
- guidance on Mystique user experience design

## The Ready For Launch Package

Covers for a requisite exercise designed to support the successful go-live of Fluent Order Management.

The Expert services provide multiple checkpoints to ensure the solution is certified to launch. The process is intended to be run 2-3 times to ensure the implementation is in a state fit for Production and is documented and issued in a Ready For Launch Report (RFL) for partner and Customer records. The report areas covered are:

- Configuration Analysis
- Inventory Management Analysis
- Workflow Analysis
- Custom Plugin Analysis
- Integration Analysis
- Platform usage and acceptance ([Here](#))

# Expert Services Packages (2/2)

## Annual health check

### Allow our Fluent Experts to check-in and analyse your implementation

Throughout the year, our customers often make configuration changes and additional customisations to meet business needs.

Our Fluent Expert Services team can perform a health check on your customisations and configurations to ensure your implementation is running the latest product offering, maximising the use of the OOTB functionality and going to work efficiently as your operations scale, avoiding performance issues and reducing any technical debt.

Our team will produce a report that will highlight key areas to help you keep your implementation up to date and operating smoothly, ensuring strategic alignment between your business objectives and what's possible via the Fluent Commerce platform.

## Performance testing

### Make sure your go-live is smooth and successful

We strongly recommend to run performance tests before going live, especially if your platform is highly customized.

Working jointly with our Expert Services team and Site Reliability Engineering team, you will benefit from our best practices and more granular data to gain time and efficiency.

Performance testing can also be carried out later, perhaps ahead of a Peak period to give your business confidence that the changes you've made since the original implementation are robust and efficient.

# Fluent Commerce Support

## Platform Support

As part of your licence contract, Fluent provides 24/7 core platform support.

## Application Support

In preparation for launch, it is essential that you have engaged an implementation support team to oversee your Fluent custom implementation.

The implementation support should be trusted to a Fluent-trained team with the right understanding of your Fluent solution. This is usually the trusted to the same implementation partner who delivered your Fluent project.

While your implementation support team will be responsible for your tailored code and custom integration, they will also be best positioned to review and raise any core platform issue on the Fluent platform support portal.

Access to the Fluent support portal will be organized upon launch for your designated implementation support team. .

[Access](#) the Fluent Commerce support portal home page to raise a ticket.

## Before opening a ticket the user should consider the following list of points:

- Did you already submit your challenge to your partner? *We want to make sure you are not submitting a ticket related to a change request (this should always be addressed to your implementation partner)*
- Has your partner conducted an initial investigation? *(This is to ensure that the issue is raised with the relevant party for prompt assistance e.g. Your selected partner is the right party to address custom implementation issues)*
- Did you identify who is accountable for tickets handling at your end? *(Ensure your Jira users are limited to a core team)*
- Do you have at hand all details to document your ticket? *You will need your account ID, Retail ID, steps to reproduce the challenge if applicable, number of orders impacted, business impact, relevant logs, screenshots*