

Dogwood House Systems Integration Discovery

Homewares wholesale · Richmond, Virginia
Prepared for Ben Holt · September 14, 2026

My recommendation

I recommend connecting confirmed warehouse dispatches to the shipment history in your existing office order application. Staff will see confirmed shipments in that screen within the agreed **fifteen-minute office-hours target**, including partial shipments.

The first release covers one warehouse and one shipment format, using the applications and staff-only server Dogwood House already owns. It preserves the existing order export to the warehouse, fulfillment calculations and office correction procedure.

Fixed implementation: USD \$3,250. Delivery is three elapsed weeks, including a five-business-day pilot. Discovery is a separate USD \$500; the combined cost is USD \$3,750 before applicable tax.

What Discovery clarified

Dana Whitaker's initial enquiry:

Can the warehouse mark our orders shipped automatically? I copy the dispatch spreadsheet into the order system every afternoon.

Following the records changed that request in three ways:

- Transfer each dispatch, including partial shipments.
- Match the exact order line, not just the product code.
- Keep corrections and repeat transfers from creating another shipment.

The enquiry walkthrough showed Dana consulting dispatch before the afternoon import. Ben and Dana chose timely answers from the office screen. If daily visibility is sufficient, keep the supported import and adopt the identity and correction rules in this report.

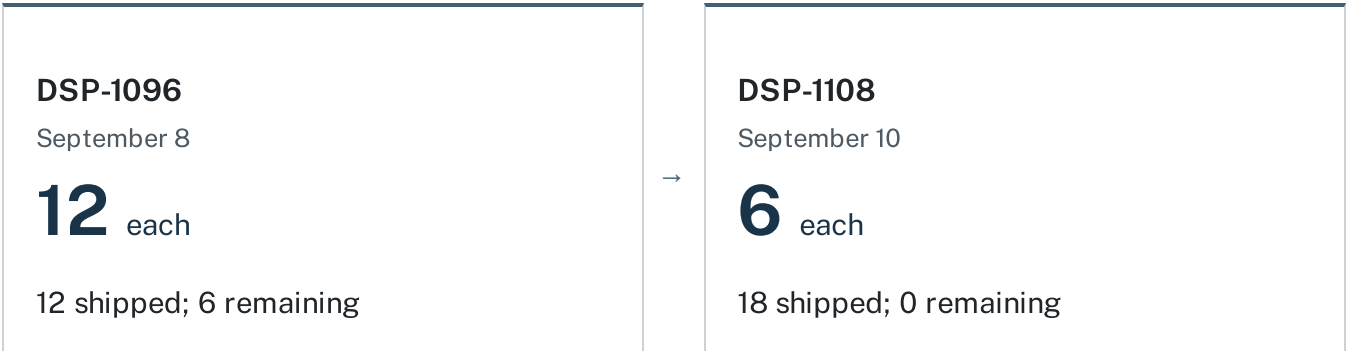
Transfer the shipment, not an order-wide status

At Dogwood House’s twelve-person homewares wholesale operation, Luis Vega confirms warehouse dispatches. Dana records them in the office application, where sales staff answer retailers’ shipment enquiries.

One order line, two departures

Order **DH-260842** contains **18 each** of natural linen runners, product **RN-NAT**, on office line **OL-8841**.

Two dispatches fulfill OL-8841



The first departure cannot complete the whole line. The existing office application already calculates fulfillment from shipment lines, so the connection should supply those lines and let the application do its established work.

A product code is not a line identity

Order **DH-260855** contains RN-NAT twice:

Office line	Ordered, each	Reviewed dispatch
OL-8890	6	—
OL-8894	6	DSP-1112 belongs here

Matching by order number and product code could put DSP-1112 against the wrong six runners. The warehouse record already carries OL-8894; the spreadsheet Dana currently copies omits that identifier.

Keep the dispatch ID and exact office line ID. A missing or unknown line is held for review; neither product name nor row position may substitute for it.

A corrected record needs an explicit handoff

The review of **DSP-1115**, confirmed on **11 September**, changes how the connection must handle revisions.

Office line OL-8922

Record	Quantity, each	Meaning
Revision 1	8	Earlier confirmed record
Revision 2	7	Confirmed correction after Luis checked the loading sheet

The evidence establishes a correction to the dispatch record. It does not establish physical loss. The existing office procedure gives Dana responsibility for reviewing corrections to recorded shipments.

Before a shipment has transferred

Use the latest confirmed, eligible revision. If revision 2 is current before DSP-1115 transfers, create one shipment for 7 each. A pre-transfer void is excluded without creating a shipment. Older revisions cannot revive it or replace a newer accepted record.

After a shipment has transferred

If revision 1 already created a shipment for 8 each, hold revision 2 for Dana. Preserve the original transfer reference; neither overwrite the shipment nor create another one. A later void follows the same review path.

Luis corrects the source. Dana applies the approved office correction and adds a dated shipment note identifying **DSP-1115, revision 2 and what was corrected**. Ruth Park follows the same procedure when covering Dana.

The next check closes the matching dispatch/revision exception only when the note agrees with the office result, recording that resolution in the journal. Later changes still require review. A note never authorizes an automatic quantity change.

Keep ordinary new shipments automatic and post-transfer changes with the office.

A small connection with a visible result

The first release adds one scheduled process on the current staff-only server. Warehouse staff continue confirming dispatches; office staff continue opening their existing order screens.

Warehouse dispatch	→ Focused connection	→ Office shipment history
Luis confirms goods and quantities.	Check identity, revision and transfer result.	One shipment; existing fulfillment calculation.

Using the applications’ existing interfaces (APIs), the connection reads dispatches and records shipment lines, quantities in each and tracking references in the office. One dispatch creates one office shipment.

Timing staff can interpret

Target: confirmed shipments visible within fifteen minutes, Monday–Friday, 8 a.m.–5 p.m. Eastern. Outside-hours confirmations are picked up when checks resume. Outages and held records are flagged separately; the target does not guarantee their timing.

Implementation note: checks run every five minutes during those hours.

A read-only status page uses existing authenticated staff access, with a downloadable exception CSV and no new login or admin application. It distinguishes:

Staff question	What the page shows
Is the source check current?	Last successful source check and current connection warning
Was this dispatch recorded?	Dispatch ID, accepted revision, office shipment reference and transfer result
What needs attention?	Held reason, responsible person and whether reconciliation is outstanding

A recent source check does not mean every shipment transferred. A failed source check does not mean there were no shipments.

Dana, or Ruth in her absence, reviews unresolved items each business day. Invalid records remain visible while unrelated valid shipments continue.

An uncertain result must not create another shipment

A connection can lose a response after the office has accepted a shipment. That is a result to investigate, not permission to send a second shipment under a new reference.

Situation	Required response	Owner
Same dispatch encountered again	Look up its original reference; retain one office shipment	Connection
Write response missing	Mark result unknown; check that reference before retrying	Technical operator if held
Missing or unknown line ID; invalid quantity	Hold the dispatch without guessing; correct the source or office record as appropriate	Dana with Luis
Source unavailable	Show failed check and last successful check; resume from recorded progress	Technical operator
Office unavailable	Pause writes; establish outstanding results before resuming	Technical operator
New revision or void after transfer	Hold for existing-office correction and a matching resolution note	Dana or Ruth

The office enforces one shipment per external dispatch reference. The journal retains that reference, accepted revision and office shipment ID for recovery.

If a correction arrives during an unconfirmed write, establish the earlier result first. An accepted earlier revision follows Dana's correction path. An unknown result stays held; staff must not add a manual duplicate.

Responsibilities remain where the facts are known

Luis owns confirmed warehouse quantities and tracking details. Dana owns office exceptions and customer answers. The office application retains ownership of order quantities, fulfillment calculations and financial work.

The **technical operator** is Morgan Shaw, your existing contractor, or Featherply for the integration tasks if Ben chooses the managed option on page 8. Morgan retains host, network and existing-application support under either arrangement.

The existing import is a real alternative

Discovery compared the current import, configuration in both internal applications and a general automation runner capable of custom HTTP requests.

Approach	Fit for this handoff	What Dogwood House maintains
Supported shipment CSV import	Retains dispatch and line identities and rejects duplicates; appropriate for daily visibility	Dana prepares and imports the file, then reconciles exceptions
Configure the two existing applications	Reviewed settings offer operator-initiated CSV transfer, with no scheduled end-to-end route	Existing import procedure remains necessary
General automation runner	Can call the interfaces; still needs the same identity journal, uncertain-result checks and correction holds	A runner plus the custom rules and their recovery procedure
Focused connection — recommended	Automates this single handoff on the existing server and makes unresolved records visible	One small process and journal; Dana handles business exceptions

Basis and remaining checks

The reviewed settings, interface notes and sample records document reading confirmed revisions and voids, creating and retrieving shipments by unique reference, and reading office reconciliation notes.

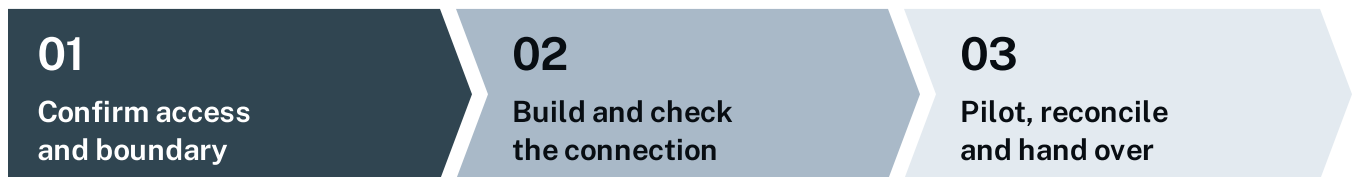
These were documentation and sample reviews, not live or sandbox tests.

Morgan must confirm access and that the deployed versions support the reviewed interfaces before implementation starts. Any material difference requires an agreed scope revision before work begins. Acceptance then demonstrates the working connection.

The fixed build uses these existing interfaces; it does not include developing new API or office-application features.

Prove the handoff before changing the routine

Allow **three elapsed weeks**, including **five pilot business days**, subject to access and staff availability. This is elapsed delivery time, not full-time engineering.



Dana approves the **dispatch-time cutover boundary** and the IDs, office references and applied revisions of later dispatches already entered manually. Earlier records and corrections stay manual. Compare without writing first; then automate the approved route and stop its manual entry.

Acceptance checks

- ☐ **Timely office answers:** record confirmation and visibility times for representative eligible dispatches. With systems available during office hours, meet the fifteen-minute target; Dana answers from the office screen. Record exceptions separately.
- ☐ **Partial dispatches:** DSP-1096 gives OL-8841 12 shipped / 6 remaining; DSP-1108 completes the line: 18 shipped, none remaining.
- ☐ **Exact matching:** DSP-1112 reaches OL-8894; missing or unknown IDs are held.
- ☐ **Revisions and voids:** DSP-1115 uses 7 before transfer; hold for Dana if 8 already transferred. Apply the same boundary to voids; never restore older revisions.
- ☐ **Replay and lost response:** repeating a dispatch and withholding a write response still leaves one shipment after reference lookup.
- ☐ **Outage recovery:** a source outage stays visibly stale; establish unknown destination results before writes resume.
- ☐ **Cutover and staff use:** pre-entered IDs are not reposted. Dana or Ruth records a correction note and sees the matching journal exception close.

Ben accepts release after the checks pass and pilot discrepancies are resolved or explicitly held with an owner.

For manual fallback, the technical operator pauses writes, establishes uncertain results and agrees the entry list with Dana. Keep the same unique external dispatch reference; only one route writes each dispatch.

Scope and cost

The fixed build includes one read-only dispatch source, one office shipment destination, one warehouse and one format, up to **60 dispatches per working day**. It includes scheduling, exact matching, duplicate protection, revision and void holds, reconciliation-note checks, status output, exception CSV, deployment, pilot and cutover.

Customer messages, invoices, payments, returns, inventory synchronization, label purchasing, replacement order exports, additional warehouses and historical backfill are outside this release.

Commitment	USD, before applicable tax
Discovery, separate and not credited	\$500
Fixed implementation	\$3,250
Total if commissioned	\$3,750
Optional managed operation	\$85/month

Managed operation covers integration monitoring on the existing host, journal backup and recovery checks, routine integration updates and **up to 30 minutes per month of business-hours fault investigation**.

Unused time does not roll over; additional support or changes are quoted separately. It does not include a guaranteed response or resolution time.

The implementation proposal records this fixed scope and the operating choice. The price relies on the existing-interface confirmation described on page 6; material differences require agreement before work starts.

Dogwood House retains its existing server and software subscriptions. No new hosting subscription or ongoing Featherply contract is required. Without managed operation, Morgan takes the operating responsibilities described here.

Ownership and your next decision

Owner	Responsibility after handover
Luis	Confirmed dispatch quantities, tracking details and source corrections
Dana, with Ruth as backup	Office corrections, reconciliation notes, exceptions and customer answers
Selected technical operator	Integration monitoring, journal backup and recovery, and agreed integration maintenance; Morgan by default, or Featherply within the page-8 managed scope
Morgan	Existing host, network and application support under either operating choice

What Dogwood House keeps

On payment, Dogwood House owns the project source code. Handover includes configuration, the transfer ledger, recovery notes and one staff walkthrough; third-party licenses retain their existing terms.

Your next decision

I recommend proceeding to the implementation proposal for this first release.

- **Ben:** approve the scope and choose the operating owner.
- **Dana, with Ruth as backup:** approve the cutover list and exception procedure.
- **Luis:** supply pilot dispatches and confirm source corrections.
- **Morgan:** arrange access, confirm the reviewed interfaces and agree server operation and recovery responsibilities.

If Ben keeps daily imports, Dana should retain dispatch and office line IDs in the supported CSV and use the same reconciliation rules immediately.