



# Optimizing the Nexodus System for the Worcester Regional Food Hub: Supplemental Materials

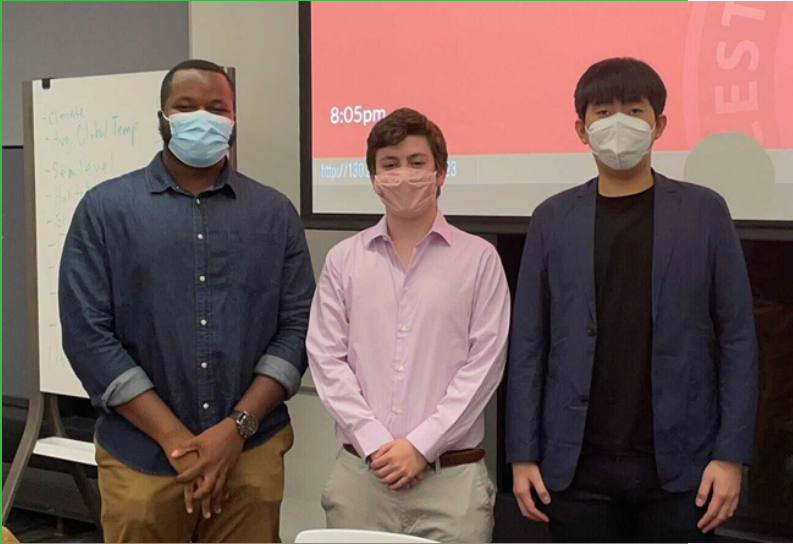
DECEMBER 16,  
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**WPI**

Worcester Community  
Project Center

## Worcester Community Project Center



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# Our Team



# Abstract

Worcester Regional Food Hub (WRFH) Director, Shon Rainford, wants to use Nexodus, a customer relationship management (CRM) system, in the WRFH expansion to Union Station. To help facilitate this, we evaluated User experience with Nexodus and assessed whether the system could manage all of the WRFH's billing, scheduling and messaging needs. To assess User experience and the capabilities of Nexodus, we used a combination of interviews and surveys. We then developed tutorial videos and user guides to enhance the User experience and streamline the WRFH's business processes. In the end, the enhanced Nexodus system at Union Station will offer an easier payment method, a more efficient check-in system, and an improved communication system that is integrated with Slack, a platform for team communication.



*Food Hub Commercial Kitchen*

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## Appendix A: Interview Preamble

### Interview Preamble:

#### PARTICIPATION

Your participation in this interview is completely voluntary. You may refuse to take part in the research or exit the interview at any time without penalty. You may skip any question you do not wish to answer for any reason.

#### CONFIDENTIALITY

If needed, your responses may be recorded either through notes or audio recording devices. Your responses and information given will remain confidential and stored in a safe and private space. At the end of the interview, if you want us to not publish your responses in our study, we will respect your decision and follow the steps necessary.

#### BENEFITS & RISKS

It is not guaranteed that you will receive any direct benefits from participating in this research study/interview. However, your responses may help us learn more about the desired features and user experience in the Nexodus system. There are no foreseeable risks involved in participating in this interview other than those encountered in day-to-day life.

## Appendix B: Interview Introductions and Questions

### **Introductions: (3 minutes)**

Hello, thank you for meeting with us today.

My name is Ralph Lambert. I am a third-year student, pursuing a BS/MS degree in Management engineering.

My name is Spencer Belleville....

My name is Zhuolin Liu....

Read preamble section to Interviewee

For this interview, we will introduce our project and purpose. We will also share our goals and objectives on this project.

### **Questions**

#### **Rapport:(5 minutes)**

- Tell us about your business? How have you handled it throughout the pandemic?

#### **Open-ended: (10 minutes)**

- Can you walk us through how you use Nexodus?
  - How do you feel about using Nexodus?
  - How has the Nexodus system affected your experience? What has worked so far and what hasn't worked yet?
- What other types of things do you wish Nexodus could do?

#### **Specific: (25 minutes)**

- Do you think Nexodus has a good system for reservations and billings and why or why not?
- Has Nexodus caused any problems or difficulties when using it?
- How do you pay invoices to the WRFH?
  - Do you use checks when paying the WRFH or not?
  - Walk us through the steps taken when making a payment!
- If yes:
  - (1) What makes you choose to use Check rather than the online billing method?
- If no:
  - (2) Do you want more online billing methods such as PayPal?
- Any idea on how Nexodus can be improved to make life easier for you?
- How long does it normally take to finish your onboarding task?
- How do you feel if you can upload the onboarding task in the future on the Nexodus system?

## Appendix B: Interview Questions and conclusion

- Do you think a community conversation such as a message board would be a good addition to Nexodus?
- food hub. need to know who is in there to not have equipment taken.
- How do you feel about checking in on paper every time you use the kitchen?
- Would you prefer to scan a QR code for automatic check-in or an Ipad Check-in or would the paper be better?
- How long do you think the billing and onboarding task should be reminded before the due date?.

### **Conclusion:(2 minutes)**

Thank you for taking time out of your day to meet with us for this interview. Do you have any questions or comments for us?



**Appendix C: Qualitative Matrix of the Interview Responses**

Nexodus Process	Themes	Minuteman Kettle Corn(HU)	Nutty Bird Granola (HU)	Stretch's Pickles (HU)	Buttered (HU)	Nana's Best
Onboarding Tasks	Online documentation	√	√	√	Prefers personal help	Prefers personal help
Scheduling	Want to see the companies before and after their reservation time	√	√	√	It's straight forward	Dislikes
Scheduling	Calendar views are hard to understand	√	√	√	It's straight forward	√
Scheduling	Want an advanced notice of User's time slot	√	√	√	√	N/A
Billing	Are comfortable with online payment as long as it is secure	√	Prefers checks for accounting	√	√	√

*Table 2. Qualitative Decision Matrix with identified themes within each Nexodus process*

*HU=Heavy User*

**Appendix C: Qualitative Matrix of the Interview Responses**

	Minuteman Kettle Corn	Nutty Bird Granola	Stretch's Pickles	Buttered
Billing (period of reminder?)	<ul style="list-style-type: none"> <li>- Secured payment method would be perfect.</li> <li>- Have a reminder of billing</li> </ul>	<ul style="list-style-type: none"> <li>- Prefer using check for accounting</li> <li>- Stop reminder of email when a check is paid</li> </ul>	<ul style="list-style-type: none"> <li>- Not much experience</li> <li>- Think the function working right now</li> <li>- Great to pay online if it's reliable</li> </ul>	<ul style="list-style-type: none"> <li>- Pay bill through Nexodus</li> <li>- it's really easy and straightforward</li> </ul>
Scheduling	<ul style="list-style-type: none"> <li>- Receive a reminder day before</li> <li>- No end time for others</li> </ul>	<ul style="list-style-type: none"> <li>- Receive a reminder day before</li> <li>- No end time for others</li> </ul>	<ul style="list-style-type: none"> <li>- Mainly booking time</li> <li>- Hate Nexodus</li> <li>- Cannot see it from calendar</li> <li>- Whole picture of the month</li> <li>- Whose in front of me and behind me</li> </ul>	<ul style="list-style-type: none"> <li>- Straight forward for me. It's clear to follow.</li> </ul>
Kitchen	<ul style="list-style-type: none"> <li>- Keep the kitchen clean and secure</li> <li>- Know the person who comes before her.</li> </ul>	<ul style="list-style-type: none"> <li>- Know each other if they come early or leave early</li> </ul>		
Community	<ul style="list-style-type: none"> <li>- Communicate with each other</li> <li>- Also can relate to security, to not get staff stolen</li> </ul>	<ul style="list-style-type: none"> <li>- communicate is very important</li> </ul>	<ul style="list-style-type: none"> <li>- To communicate with people behind me and in front of me. In case running late</li> </ul>	<ul style="list-style-type: none"> <li>- It's an inactive function and people are afraid to use it. Since nobody using it</li> <li>- In case of running late to kitchen, it'll be so easier to have a communication</li> </ul>
Onboarding task(period of reminder?)	<ul style="list-style-type: none"> <li>- Get a reminder.</li> <li>- Upload online.</li> <li>- Need to be secured online.</li> </ul>	<ul style="list-style-type: none"> <li>- have a reminder</li> <li>- It's easy for people to upload their paperwork</li> </ul>	<ul style="list-style-type: none"> <li>- Love to have onboarding task online</li> <li>- convenient</li> </ul>	<ul style="list-style-type: none"> <li>- It should be offline, which is easier to communicate with humans.</li> </ul>
Check-in	<ul style="list-style-type: none"> <li>- Don't want to change to another way of check-in, because I can't see other people before me.</li> </ul>	<ul style="list-style-type: none"> <li>- It's very convenient to have an online check-in, which may not make someone take advantage of paper.</li> </ul>	<ul style="list-style-type: none"> <li>- Not bothering</li> <li>- It's ok to have online check in system</li> </ul>	<ul style="list-style-type: none"> <li>- Paper check-in is ok for me.</li> <li>- No needs to be digital for check-in</li> <li>- QR code would be a pretty good fit for me.</li> </ul>

## Appendix D: Survey Questions and Responses

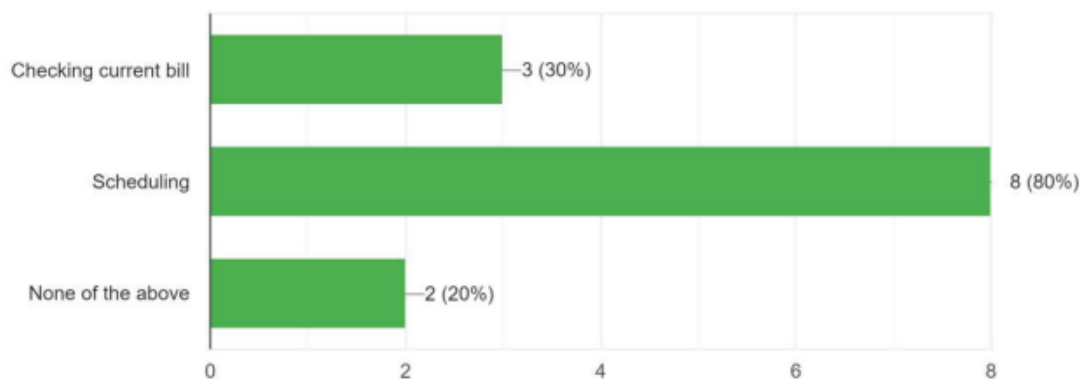
We created this survey to get a broader sense of WRFH commercial kitchen users' opinions of Nexodus. There are a total of 62 commercial kitchen users. We received ten responses.

### Nexodus Survey of Worcester Regional Food Hub

Hello, we are a group of students from Worcester Polytechnic Institute, and we are working with the Worcester Regional Food Hub. We are conducting research on the Nexodus system to identify opportunities to expand the use of the system at the Worcester Regional Food Hub. We believe this research will enhance the management of the Food Hub in preparation for the expansion to Union Station. This survey should take about five to ten minutes. Your participation in this survey is completely voluntary and you may withdraw at any time. Please remember that your identity will remain confidential. Your participation is greatly appreciated. If you have any additional questions, you may reach out to us at [gr-wpiworcesterregionalfoodhub@wpi.edu](mailto:gr-wpiworcesterregionalfoodhub@wpi.edu). You may also reach out to our faculty advisors Corey Dehner: [cdehner@wpi.edu](mailto:cdehner@wpi.edu) and Elizabeth Lingo: [ellingo@wpi.edu](mailto:ellingo@wpi.edu). If you would like to see the results of our research, you can find the report at <https://www.wpi.edu/library>.

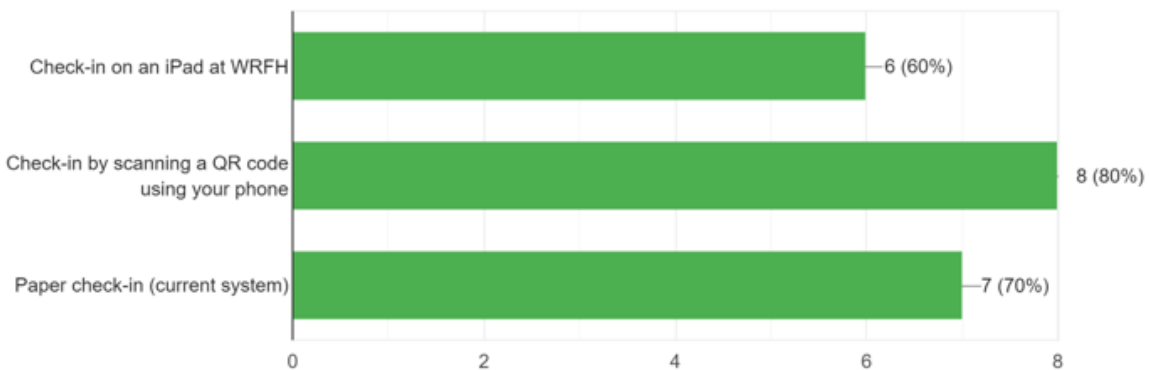
2. Which business process(es) do you currently use Nexodus for? (Select all that apply)

10 responses

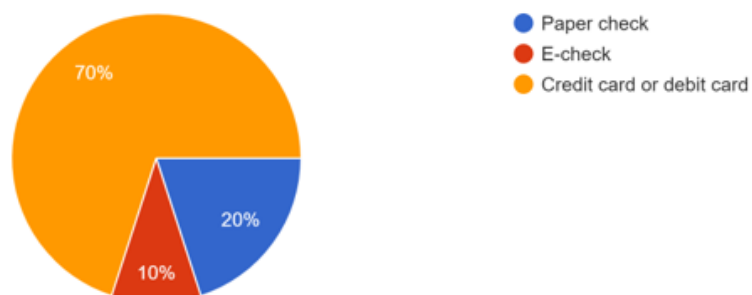


**Appendix D: Survey Questions and Responses (cont'd)**

3. Currently, in order to check in to the WRFH kitchen, users must use a paper check-in. WRFH is re-envisioning check-in procedures. Please select ... would be comfortable using. Select all that apply  
10 responses



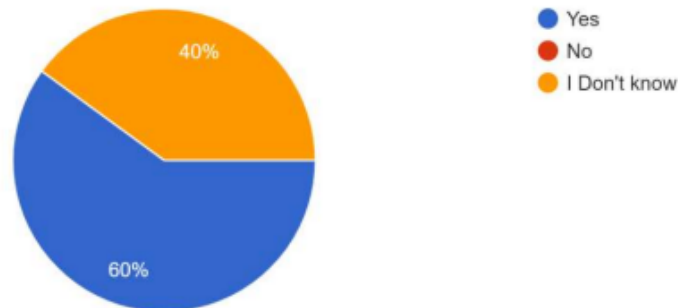
4. Currently, the Nexodus system allows WRFH kitchen users to pay by credit or debit card and the WRFH is trying to streamline payment processes. W...uld you be most comfortable using to pay a bill?  
10 responses



**Appendix D: Survey Questions and Responses (cont'd)**

5. Nexodus has a function named Community. This function provides users with a message board to communicate with each other. Do you think a c...unity message board on Nexodus could be useful?

10 responses



6. Please elaborate on your answer to question 5. Why or why not?

10 responses

You can't have too much communication.

To communicate interests, needs, announcements to others

I said I don't know

Better communication

The forum can help us exchange ideas, share events, ask questions. the message board can be very useful.

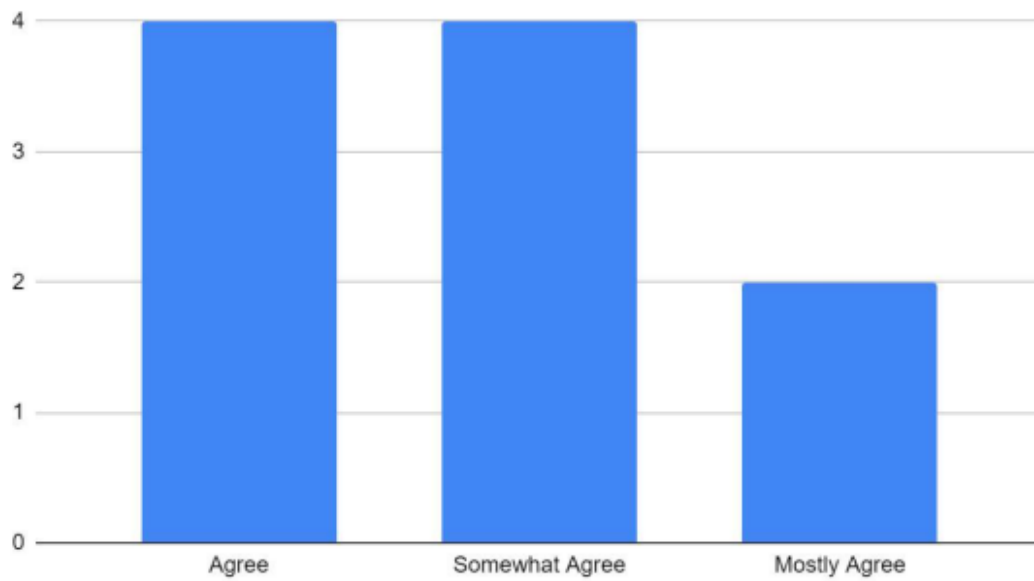
Not sure if it will get enough users

I'm not sure how it can be used, but I think having a way for all of us to communicate business to business, or fellow kitchen user to fellow kitchen user, might be helpful.

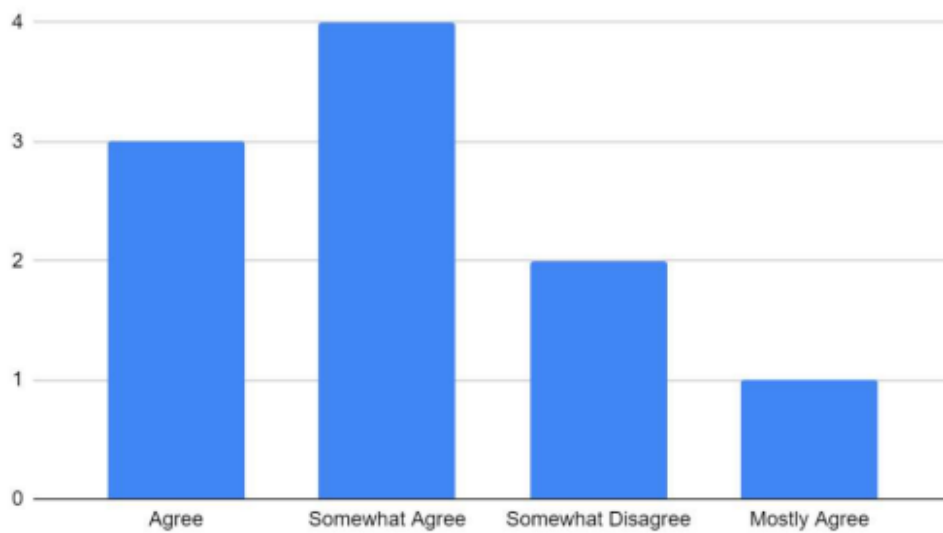
Could be useful in terms of how to use a new piece of equipment or to swap schedules

**Appendix D: Survey Questions and Responses (cont'd)**

7a. The Nexodus reminder system works well

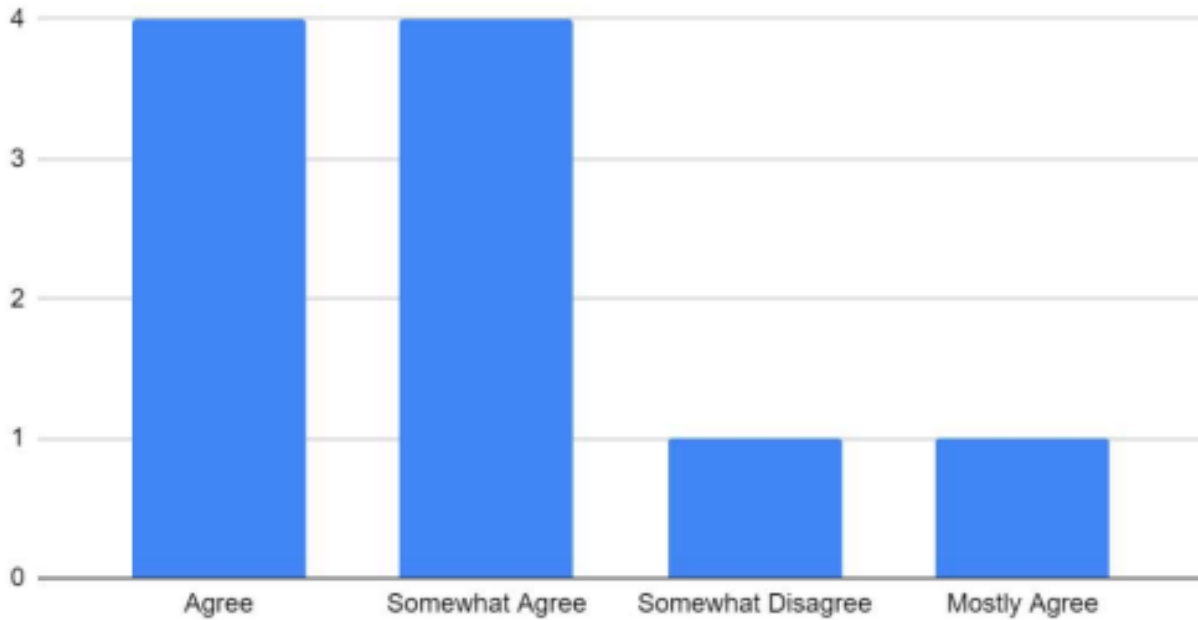


7b. The Nexodus scheduling system is easy to use

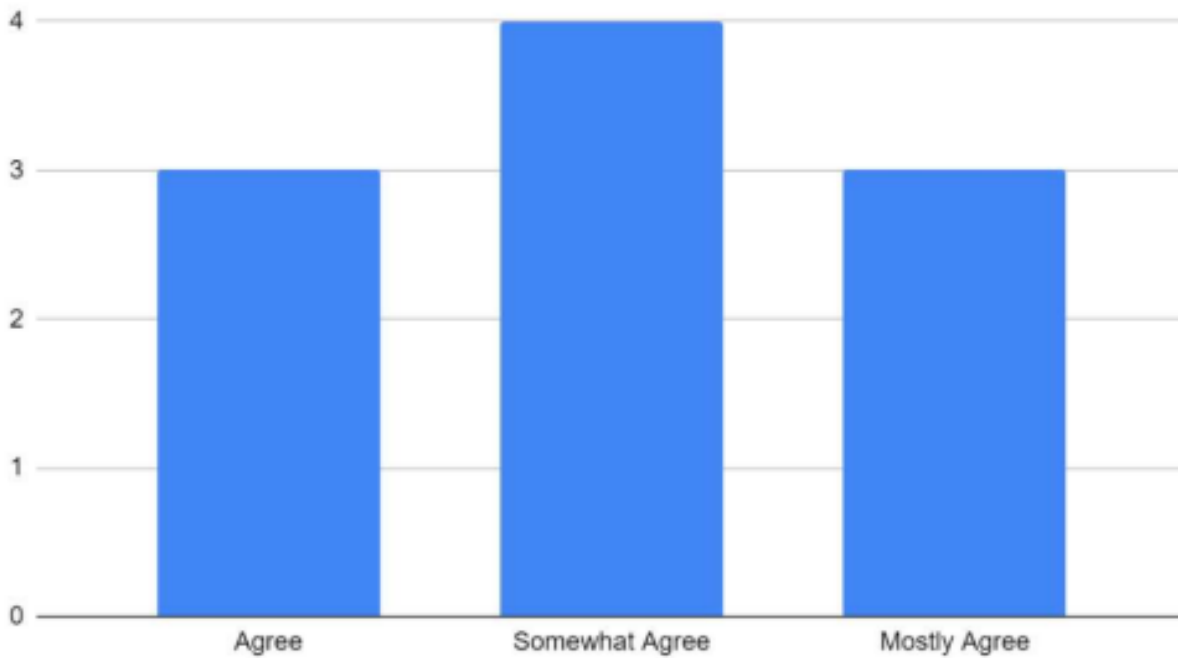


**Appendix D: Survey Questions and Responses (cont'd)**

7c. The Nexodus scheduling system provides us with all of the information we need



7d. The Nexodus billing system is easy to use



**Appendix D: Survey Questions and Responses (cont'd)**

8. Please share any additional feedback you have on the Nexodus reminder system.

4 responses

Works well.

Must be mobile friendly

I currently don't know if there is a text reminder, but this feature would be helpful

The billing system wants to charge for invoices already paid and charges for time booked in the future.

9. Please share any additional feedback you have on the Nexodus scheduling system.

3 responses

It would be helpful to see business name on the calendar instead of User name. Additionally, it was be useful to easily see end time of others booking on the calendar.

Allocated time by others needs to be displayed like the old calendar

The application calendar and the desktop could be more integrated, they seem very separated.



## Appendix E: Guidelines for Administrative use of Nexodus System

The following is a step-by-step guide that helps an administrator with different Nexodus features, such as: creating a message board and changing scheduling reminders.

### **Message Board** (*Nexodus,2020*)

#### **I. Adding Discussion Board Groups**

1. If the navigation menu isn't visible, click the menu icon in the top left corner of the page.
2. Click Community > Message Boards > Groups.
3. Click Add group.
4. Select a space admin from the Administrator drop-down list.
5. Name the group and add a short description.
6. Select the group's visibility from the Group Access drop-down list.

#### **Visibility Options**

*Restricted* - all customers can see the conversations, but they cannot add messages.

*Public* - all customers can see the conversations and add messages.

*Private* - only members of the group can see the conversations and add messages.

7. Add the customers you want to include in the group from the Members drop-down list.
8. Click the Save button.

#### **II. Editing Discussion Board Groups**

1. If the navigation menu isn't visible, click the menu icon in the top left corner of the page.
2. Click Community > Message Boards > Groups.
3. Click on the group you want to edit.
4. Edit the group's details as needed.
5. Click the Save Changes button.

#### **III. Deleting Discussion Board Groups**

You cannot recover deleted records in Nexodus.

1. If the navigation menu isn't visible, click the menu icon in the top left corner of the page.
2. Click Community > Message Boards > Groups.
3. Click the three dots icon next to the group you want to delete.
4. Click Delete in the pop-up menu.
5. Click Yes to confirm your action.

Guideline link:

[https://docs.google.com/document/d/1B3FpUE0yv1-I4N\\_2AUyipvFgfT5f493IrCNc-XViS4/edit#](https://docs.google.com/document/d/1B3FpUE0yv1-I4N_2AUyipvFgfT5f493IrCNc-XViS4/edit#)

## Appendix E: Guidelines for Administrative use of Nexodus System(cont'd)

### IV. **Managing Conversation Messages**

As an admin, you can add messages to conversations and delete any existing message in a conversation on the Discussion Board page.

You can add messages to help customers or share important information. You also have the option to delete messages if they go against your community guidelines.

Admins also need a customer account in order to add messages to discussion boards.

If your admin account isn't linked to a customer account yet, follow the WRFH tutorial [Creating Customer Accounts for Admin Users](#)

### V. **Adding Messages to Conversations**

1. If the navigation menu isn't visible, click the menu icon in the top left corner of the page.
2. Click Community > Message Boards.
3. Click on the relevant conversation.
4. Add your message in the empty text field.
5. Click send.

### VI. **Deleting Messages from the Conversations**

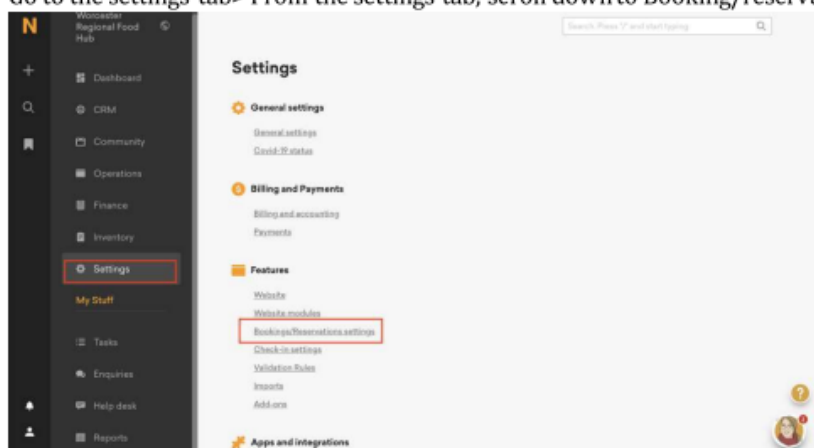
You cannot recover deleted records in Nexodus.

1. If the navigation menu isn't visible, click the menu icon in the top left corner of the page.
2. Click Community > Message Boards.
3. Click on the relevant conversation.
4. Click Delete at the bottom of the message you want to delete.
5. Click Yes to confirm your action.

### VII. **Scheduling notifications:**

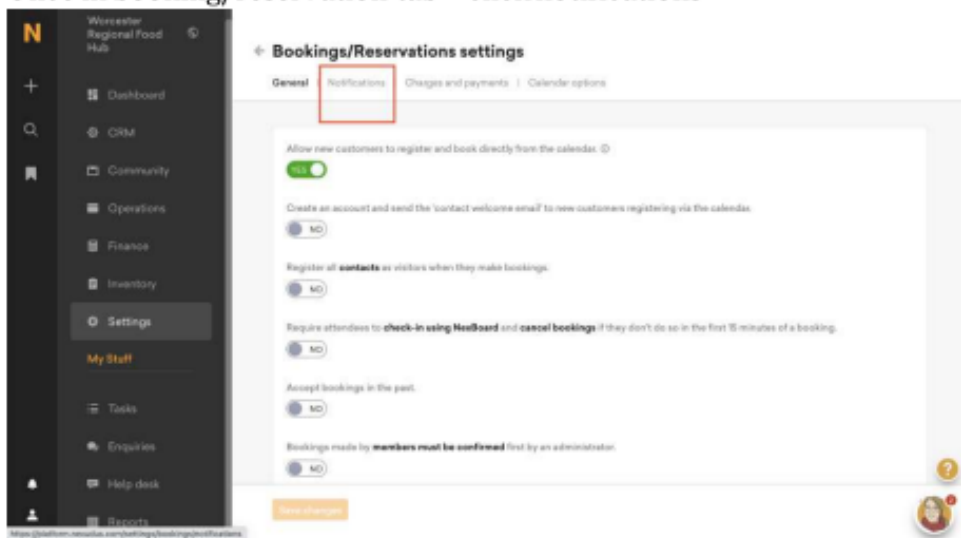
As an Admin, to change the notifications, you must follow the steps below.

1. Go to the settings tab> From the settings tab, scroll down to Booking/reservations settings.



Appendix E: Guidelines for Administrative use of Nexodus System(cont'd)

2. Once in booking/reservation tab > click notifications



## Appendix E: Guidelines for Administrative use of Nexodus System(cont'd)

3. Click yes for [sending email confirmation], Yes for [booking reminder], set desired time frame for reminder to be sent.

Worcester Regional Food Hub

← Bookings/Reservations settings

General | Notifications | Charges and payments | Calendar options

Send an **email confirmation** for each booking.  
 YES

Send a **booking reminder** before the booking starts.  
 YES  
728 minutes before the bookings starts.

Send a **booking confirmation** to every booking **guest/visitor**.  
 YES

Include a **Internet Access Token** in booking confirmation and reminder emails. ⓘ  
 NO

## Appendix F: WRFH User Guideline for Commercial Kitchen Users

The following is Nexodus guidance document for the Worcester Regional Food Hub Commercial Kitchen (Commercial Kitchen) users. It contains information on how users can create a conversation in the message board, Gap, Slack user guideline, how to find customer names and companies and how to add credit card.

WRFH's Nexodus website: <https://worcesterfoodhub.spaces.nexodus.com/>.

### *Adding Conversations to the Discussion Boards (Nexodus,2020)*

1. If the navigation menu isn't visible, click the menu icon in the top left corner of the page.
2. Click community> Message Board.
3. Click Add Conversation.
4. Add a subject for your conversation and select your location.
5. Add your message.
6. Select a group.
7. Add tags to make it easier for customers to find your conversation.
8. Set the Instant delivery toggle to YES if you want customers to receive the notification straight away.
9. Click the **Save** button.



### **How to use Slack: your quick start guide**

Welcome to Slack — a messaging...  
slack.com

### **Finding customer names and companies on Nexodus :**

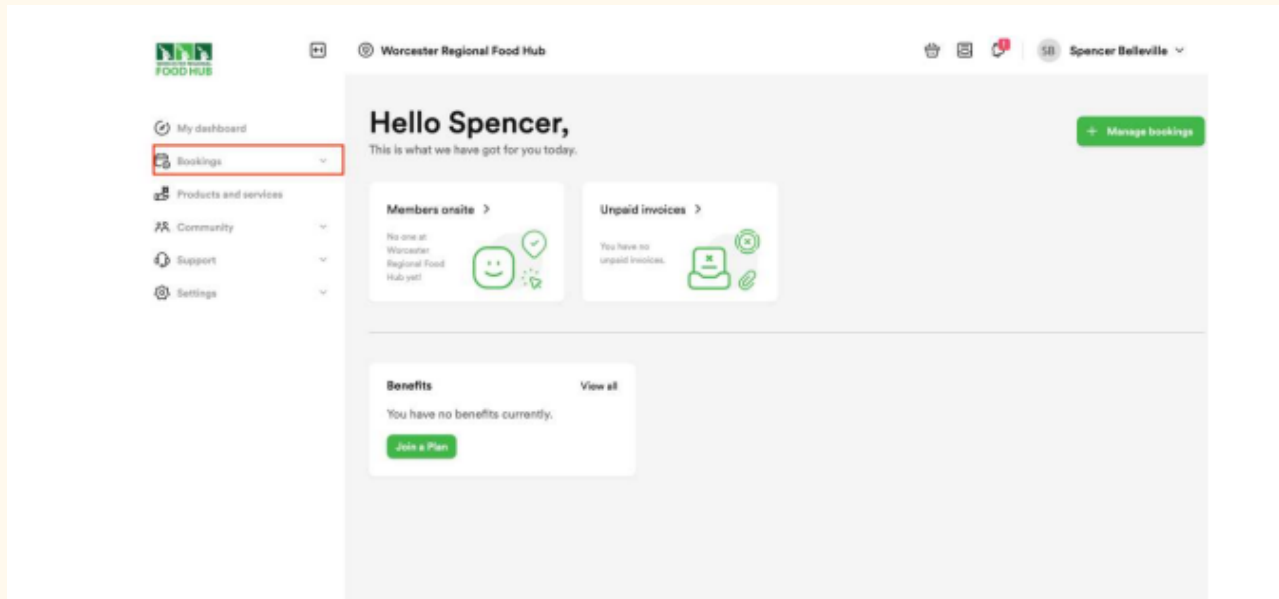
To be know who is in the kitchen with their names, you must:

1. Click bookings > Calendar

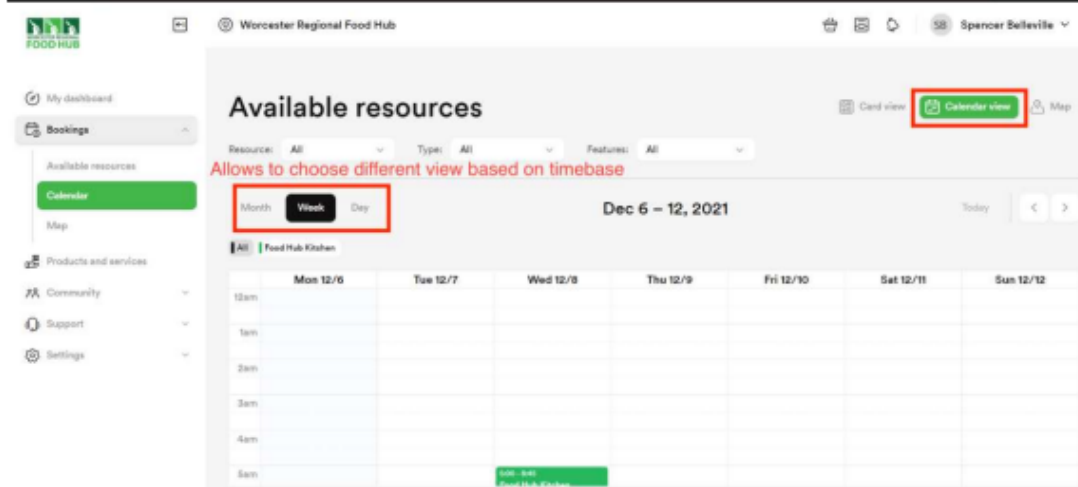
WRFH Nexodus Website : <https://worcesterfoodhub.spaces.nexodus.com/?public&>

Slack User Guideline: <https://slack.com/help/articles/360059928654-How-to-use-Slack--your-quick-start-guide>

## Appendix F: WRFH User Guideline for Commercial Kitchen Users(cont'd)

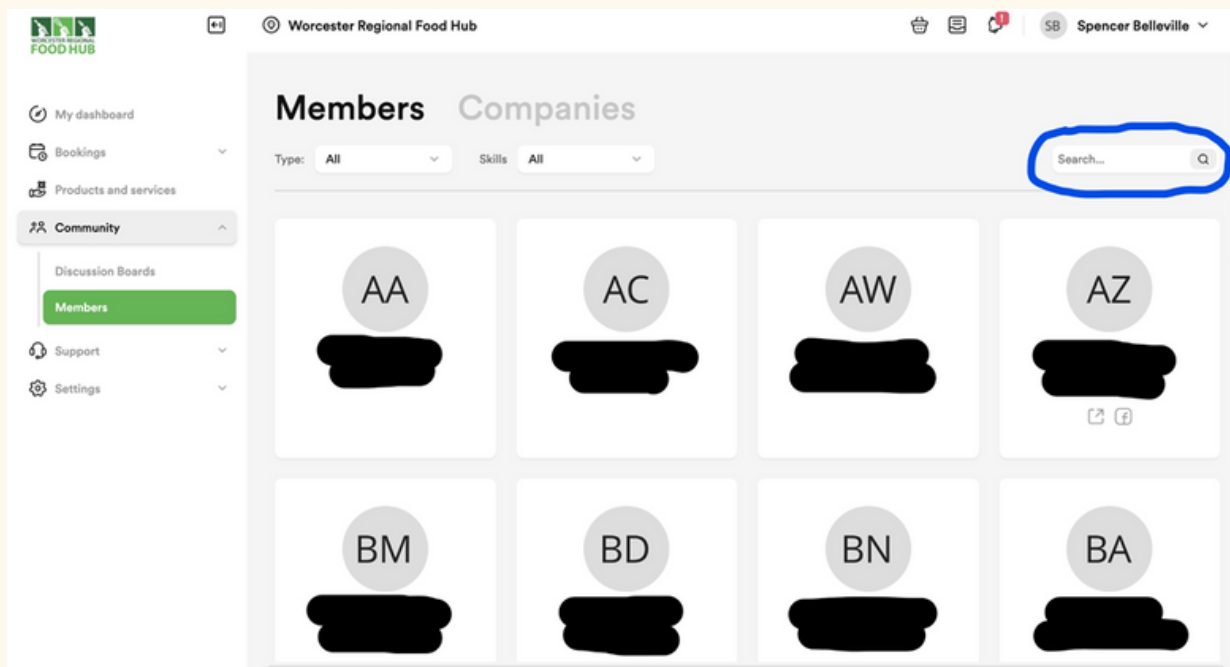


2. Top right of the page, there is a green button that says [ Calendar view ] >click on it.



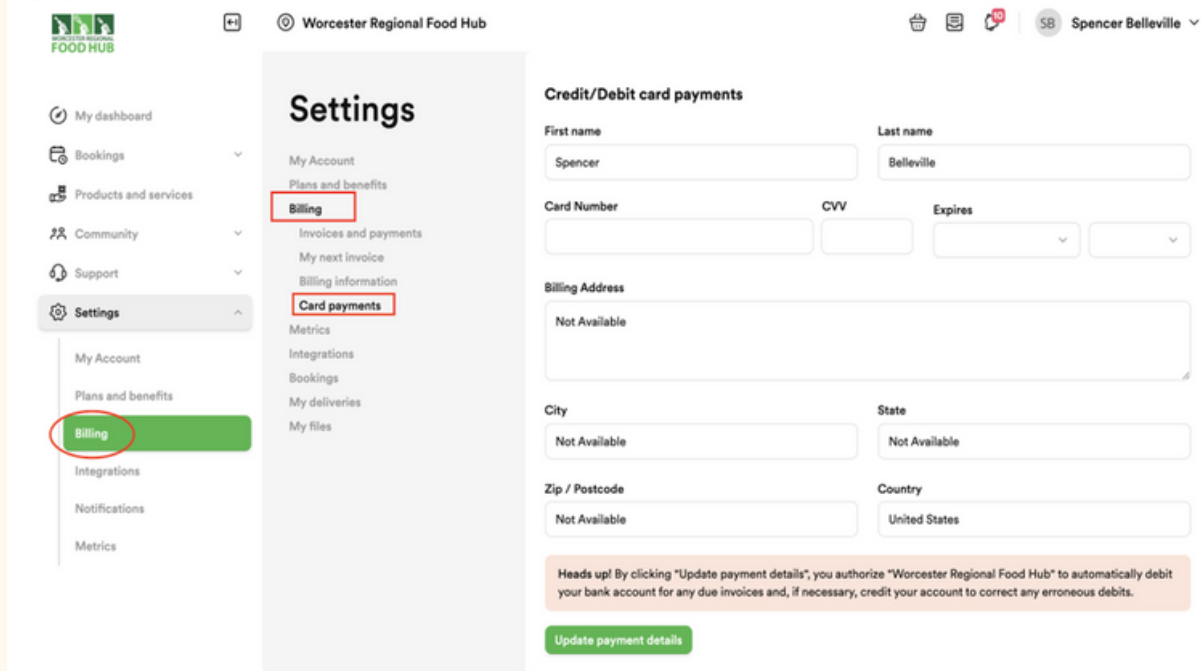
3. Hover mouse over desired time and see the name of the customer that is using the kitchen at that specific time.
4. Once you find other customers' names, click community > members and type in their names at the top right corner of the page, you can find a search bar > type their names in you can find their company's name.

### Appendix F: WRFH User Guideline for Commercial Kitchen Users(cont'd)



### Billing/Card Payment

In order to make a payment via credit/debit card, go to the settings tab> click on [Billing], >Click on card payments. Enter card information and the payment will be sent after each invoice is received on the 1st of the month.



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## Appendix G: Nexodus Helpline Questions

The following is the email draft sent to the Nexodus helpline concerning our issues with some of the features on the System.

Greetings, we are a group of students from Worcester Polytechnic Institute. We are currently working with the Worcester Regional Food Hub, and we are helping them implement some features from the Nexodus system. However, we ran into some difficulties and were wondering if this support line would be able to help us out.

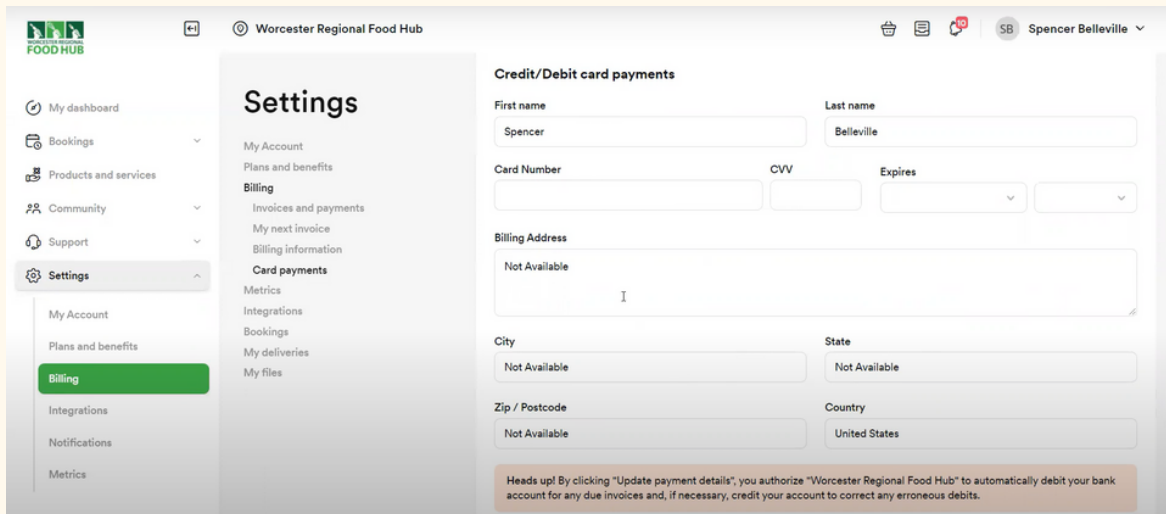
- Our first question is concerning Community board messaging. How can we create a group where the Worcester Regional Food Hub members can communicate with each other?
- How can individuals from the food Hub create events and invite other members of the group?
- Is there a way that there can be one document where users can download and upload files to?



## Appendix H: Interview tracking sheet

A9    -    fx    Nexodus interview								
	A	B	C	D	E	F	G	H
1	Topic	Name	email	Date sent	Date received	Follow up email	Interview date	
2	Nexodus interview	JP BBQ	twistedchefjay@gmail.com	Oct/29	Nov/1	Nov/1	Too busy /did not meet	
3	Nexodus interview	Commonwealth	quontay@commonwealthkit	Oct/29	Not received	No follow up	No interview	
4	Nexodus interview	Kettlecorn	lifeofsue@hotmail.com	Nov/1	Nov/2	Nov/2 & Nov/4	Nov/5	
5	Nexodus interview	Nutty bird (Bryan)	brian@nuttybirdgranola.com	Nov/1	Nov/3	Nov/3	Nov/9	
6	Follow up call	JP BBQ	twistedchefjay@gmail.com	Nov/1	Nov/1	Nov/08	Nov/23	
7	Followup call	Commonwealth		Nov/1	Nov/3	Nov/3	Do not accept interview	
8	Wpl IQP student	Ethan Farrah	emfarrah@wpi.edu	Nov/1	Nov/09	Nov/4	Nov 12	
9	Nexodus interview	Nana's best	disessab@yahoo.com	Nov/3	Nov/5		Nov/8	
10	Nexodus interview	Trang Le(AN)	trangle1997@yahoo.com	Nov/22		Nov/29		
11	Nexodus Interview	Esther Smith	allpurposebakery@yahoo.com	Nov/22		Nov 29		
12	Nexodus Interview	kate Rush	battered508@gmail.com	Nov/22	Nov/22	Nov 29	Dec/2 (Noon)	
13	Nexodus interview	Cheryl Gaudreau	jon@stretchspickles.com	Nov/22	Nov/23	Nov 29	Nov/30 (2:30) via call	

## Appendix I: WRFH User Guide Video



<https://youtu.be/Mj5nv4M-Oiw>