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Function Requirement Document

Connect-us AOP

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1. TICKET DETAILS

Ticket ID	TT2782
Ticket description	In the Connect-us AOP, implement the process of plan and revised target approval and rejection.
Created by	@Dinesh Sonawane
Created on	// 15-06-2022
Priority	High

2. APPROVALS

Field	**Name of the User**	**Approved date by the user**
Actual User Name **Actual User Department** **Organization Name**	Dinesh Sonawane Audit Department CSPL	
Assigned BA	Priyanka Gole	
Assigned Developer	Punam Shinde	
Assigned Tester	Poonam Deshmukh	

3. INTRODUCTION

In the Connect-us AOP, branch managers, Corporate Office Heads define plan for selected period. If the plan is appropriate management team approves it or rejects.

4. BUSINESS REQUIREMENT

User wants to develop a AOP system in which plan and revised targets entered by branch managers and auditing team would be reviewed, approved or rejected till final approval of planned target by management team.

Requirement ID	Requirement Name	Short Description	Priority
BR001	Add total column	It will show addition of planned and revised target of all branches and corporate office on approval and addition page.	Medium
BR002	Freeze rows and columns	As revised and plan page is too big and to make user friendly UI freeze 1st 2 rows (branch name heading and plan and revised) and 1st column heads	Medium
BR003	Up and down arrow movements	To add targets column wise up and down arrow keys are useful.	Medium
BR004	Bulk approval and rejection	Require a provision to approve/ reject all at a time by management team.	High
BR005	Single approval and rejection	Require a provision to single entity approval and disapproval by management team	High
BR006	Attractive UI for approval and rejection	Use appropriate color coding for rejected and approved entity	Low phase 2
BR007	SI plan auto fetch	Auto fetch the plan from SI. Check details last page	Very High

5. SCOPE

The scope of the project is to approve or reject the plan. Rejected targets will be open to reenter plan till final approval by management team.

Also avail the facility of bulk approval and rejection with proper remark.

6. BUSINESS & SYSTEM RULES

- Users should be logged in to the system with appropriate authorities.
- Branch managers/audit team head should be able to view/ add/ update mapped branches/departments details only. It should be worked according to login branch mapping.
- Management team should be able to view/Approve/Reject single or bulk entity all
- The system should display appropriate error popup message for incorrect details if any.should pop up a message, if any issues in the system is detected.
- All forms should have field validations. The system should display field errors in case of incorrect inputs.
- If the plan is rejected by management team, then it would get removed from system or make it zero and it would be editable to end user who will update plan target.
- Auto fetch the Plan target values from SI in case of Sales jewellery and Sales Bullion.

7. ABBREVIATIONS & TERMS

- AOP: Annual Operation Plan
- COGS: Costs of Goods sale

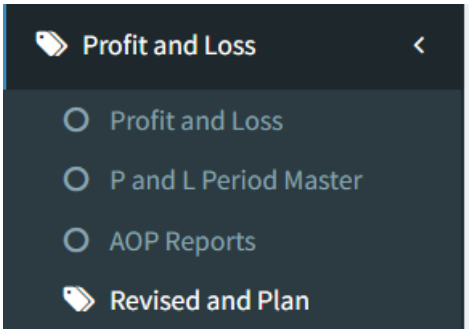
8. EXISTING SYSTEM

In the existing system of live connect-us server, user (management team) is not able to approve or reject the plan target entered by branch managers or other.

9. GRAPHICAL REPRESENTATION

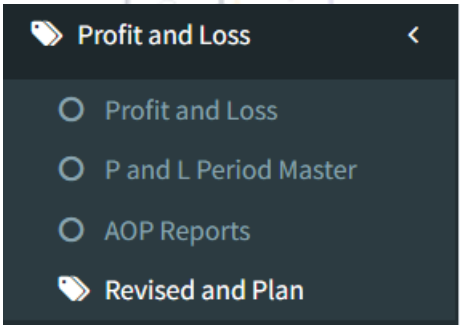
Enter the target using following path

Profit and Loss --> Revised and Plan ---> Select the period where you want to set target. ---> Submit button



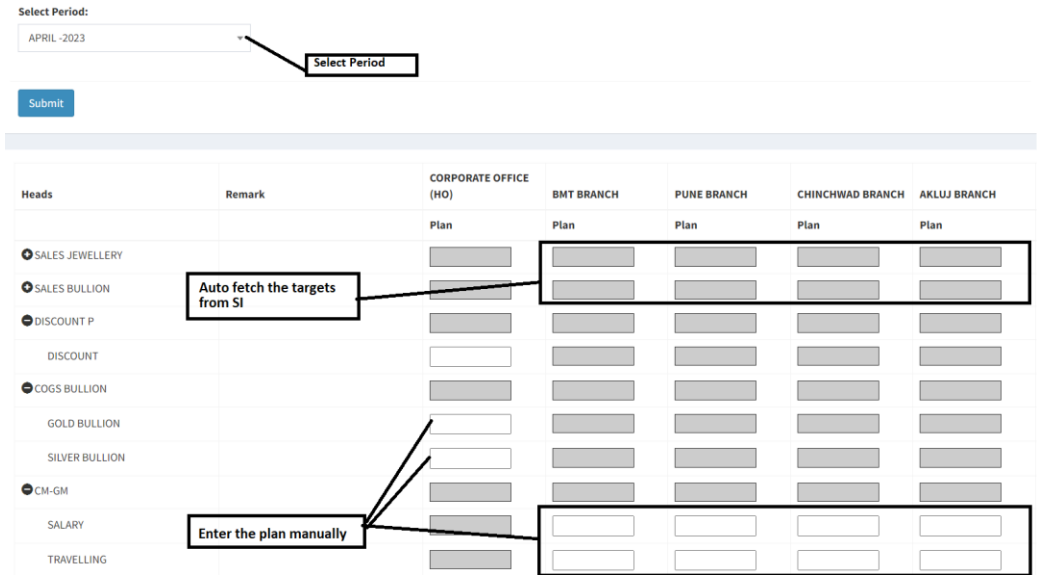
10. PROPOSED SYSTEM

Branch managers would be able to enter plan for mapped branches only. Using path below

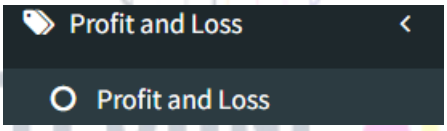


Update the plan in below page

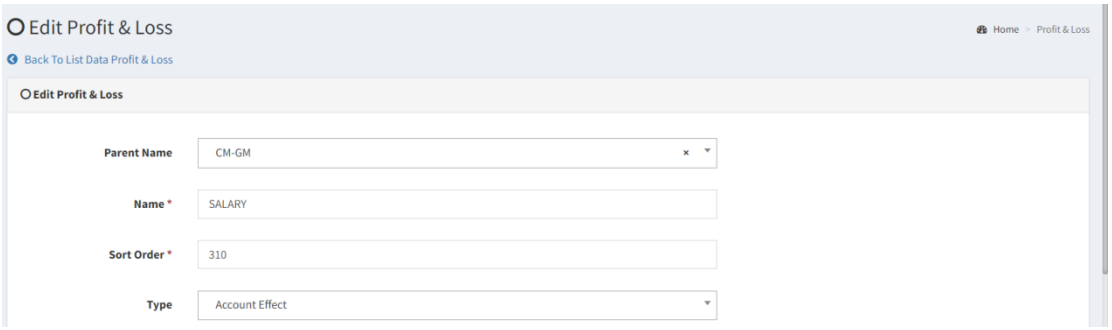
Select the period for which user wants to enter plan target.



User would be able to add branch wise or HO wise plan. This setting is available on below path



If the type is department, then it is open to edit by department head otherwise by branch managers.



Input table

FIELDS	INPUT TYPE	MANDATORY/ OPTIONAL	DESCRIPTION
Select Period	Drop down	Mandatory	Select the period for which user want to add planned target. This data comes from period master.
Submit	Button Click	Mandatory	Click on the submit button to open AOP table view of selected period, so that user can update planned and revised target in it.
Save	Button Click	Mandatory	Click on save button to save the details entered by user and to send data for approval.
Addition	Expand/ collapse	Mandatory	Addition of child would get saved on parent. For e.g sales jewellery = (Gold O + Silver O+ Diamond)

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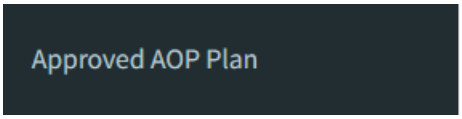
Below is the screenshot that shows Addition of child to parent and updating the data

Addition of child would get saved on parent field.

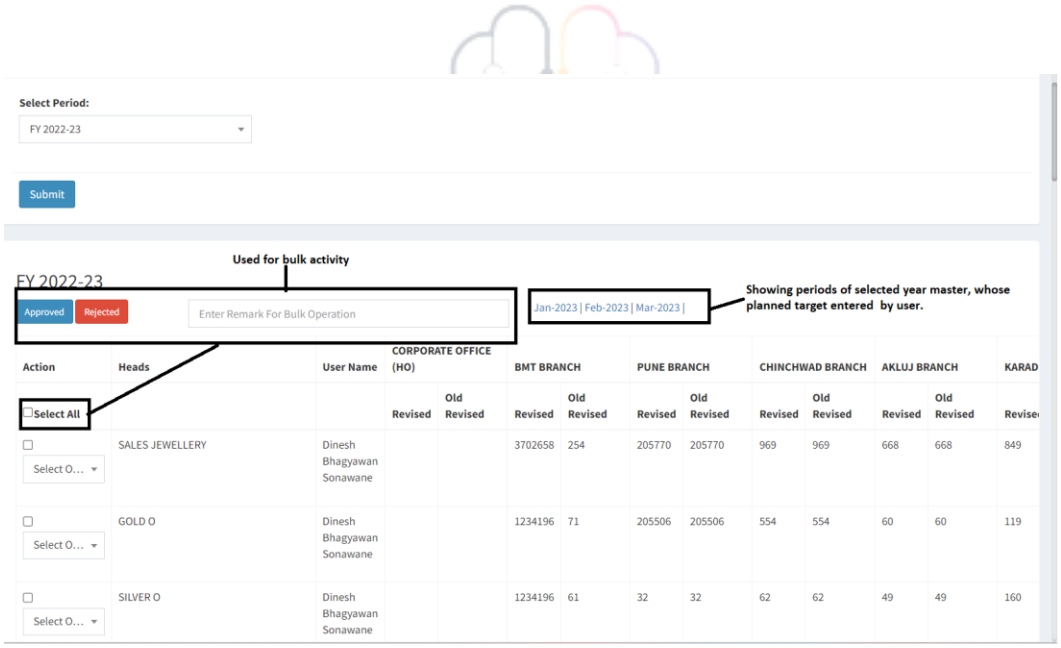
Approval and disapproval of planned target by management Team.

Login by management team

Follow the path in connect-us



Select the period (year master) from drop down and click on submit button it will open AOP table for selected year master period.



While single approval or rejection

Check the checkbox ----> select option as approved or rejected ---> If rejected then add remark. ---> Click on Submit Button.

If the plan is rejected then it will be again open to reenter the planned target. User will be able to edit the target again and till final approval.

Special Authority to update approved plan.

In special cases like pandemic situations, the user needs to update the revised target once again though it is already approved. So, make a provision to reupdate it with special authority only. Also maintain history (updated by username and updated at datetime) for it.

Planned target amount = proposed target*proposed target amount

Revised Target Amount also shown in the below path

path to check: sales Incentive--> Sales Transaction ---> Period Target --->select period (for eg Quarter 2 FY2022-23)) --->select branch (for eg pune) ---> click on filter button ---> You will view product group wise all details.

Branch	Target Group	Period Master	created_at	Year Master	Proposed Target	Proposed Target rate	Proposed Target Amount
Pune Branch	MRP Items	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	366664.00	1.00	366664
Pune Branch	Platinum	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	30.00	4000.00	120000
Pune Branch	Diamond Jewellery	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	2750.00	5000.00	13750000
Pune Branch	Silver Bullion	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	16000.00	50.00	800000
Pune Branch	Silver O	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	150000.00	60.00	9000000
Pune Branch	Gold O	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	46800.00	5000.00	234000000
Pune Branch	Gold Bullion	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	6850.00	4500.00	30825000
Pune Branch	Diamond	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	250.00	65000.00	16250000
Pune Branch	Stone	Quarter 2 (FY-2022-23)	2022-12-02 05:21:24	FY 2022-23	1300000.00	1.00	1300000

11. REFERENCES OF THE USERS

User	Name	Mail	Contact number
Actual user	Dinesh Sonawane	ia@csjewellers.com	
Ticket created by (if any)	DInesh Sonawane TT2782		
Assigned	Priyanka Gole	Priyanka.gole@tech	

business analyst		neai.com	
Assigned developer	Poonam Shinde		
Assigned tester	Punam Deshmukh		

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