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**PENDING ORDER**

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**Functional Requirement Document**

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1. **TICKET DETAILS**

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| --- | --- |
| **Ticket ID** | T21122 |
| **Ticket description** | Requirement by Aditya sir: Create PO system in Ticketing system (mobile compatible) Below menus and reports will be included in this phase: 1. Generate Requisition 2. Generate PO 3. History 4. Vendor Export Report 5. Order Qty Report |
| **Created by** | Sanika Dewoolkar |
| **Created on** | 2024-04-23 |
| **Priority** | Very High |

1. **VERSION CONTROL**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Sr. No** | **Version no** | **Version Date** | **User name** | **User department** |
| 1. | 1.0 | 28/4/2024 | Sanika Dewoolkar | IT Implementation |

1. **APPROVALS**

|  |  |  |
| --- | --- | --- |
| **Field** | **Name of the User** | **Approved date by the user** |
| **Actual User Name Actual User Department Organization Name** | Aditya Shah  Techne Ai Pvt Ltd | 23/04/2024 |
| **Assigned BA** | Sanika Dewoolkar |  |
| **Assigned Developer** | Jaydeep Patil  Somya Ranjan |  |
| **Assigned Tester** | Vaishnavi K |  |

1. **BUSINESS REQUIREMENT**

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirement ID** | **Requirement Name** | **Short Description** | **Priority** |
| BR001 | Upload bulk file of new order | User will upload an excel file with details as Karagir, item, category, size range, weight range, Karagir weight range, knock off weight range, Karagir size range, pending pcs | High |
| BR002 | Bulk upload - Grid | Once excel file is uploaded with valid details, record will be displayed in grid. | High |
| BR003 | Generate PO | User will select the vendor, delivery date, item category, and input the Order Qty. | High |
| BR004 | PO Bulk upload format file | Once the user submits the pending order, excel file will be generated with the pending order submitted by user | High |
| BR005 | History | History of orders submitted should be maintained in this menu | Medium |
| BR006 | Vendor Export Report | Through vendor export report users will be able to view and export report of pending order given to vendors | Medium |
| BR007 | Order Qty Report | Through Order Qty Report, users will be able to view and export the total order quantity submitted. | Medium |

1. **SCOPE**

Using the Generate Requisition menu, users can upload an Excel file containing order details to be provided to the vendor. Upon successful upload of a file with valid data, Users can submit the order Qty by selecting the valid details.

Upon submitting the order, PO Bulk upload file will be generated, which users will be uploading in Connect Us 1.0 in the PO Bulk File Order Upload menu, and the process will continue as per the existing system.

Through History users can view the previous orders submitted by filtering the data by date, vendor name.

Through Order Qty Report, users will be able to view and export the total order quantity submitted.

Through vendor export report users will be able to view and export report of pending order given to vendors

1. **BUSINESS & SYSTEM RULES**

* User should be registered in the system.
* User should be logged in.
* System should display error message for incorrect details if entered.
* System should pop up a message, if any issues in the system is detected.
* All forms should have on field validations. System should display on field errors in case of incorrect inputs.

1. **ABBREVIATIONS & TERMS**

PO - Pending Order

SCM code- item, category, weight range, size range, purity range

Wt - weight

Qty - quantity

1. **EXISTING SYSTEM**

There is no existing system in Connect Us 2.0 for Pending Order.

1. **GRAPHICAL REPRESENTATION**

Refer the Figma below :

[https://www.figma.com/proto/lDHc1cpiSNzDxT4iTKpPpw/PO?type=design&node-id=55-408&t=qECniYPIxqe2cmA4-1&scaling=scale-down&page-id=55%3A383&starting-point-node-id=55%3A408&mode=design](https://www.figma.com/proto/lDHc1cpiSNzDxT4iTKpPpw/PO?type=design&node-id=55-408&t=qECniYPIxqe2cmA4-1&scaling=scale-down&page-id=55:383&starting-point-node-id=55:408&mode=design" \o "https://www.figma.com/proto/ldhc1cpisnzdxt4itkpppw/po?type=design&node-id=55-408&t=qecniypixqe2cma4-1&scaling=scale-down&page-id=55%3a383&starting-point-node-id=55%3a408&mode=design" \t "_blank)

1. **PROPOSED SYSTEM**

We will have a main menu as PO and Generate Requisition, Generate PO, Order History, Vendor Export Report, Order Qty Report in it.



* 1. **GENERATE REQUISITION:**

Through Generate Requisition menu the user will upload the Excel file containing the details of orders given for Karagirs as per the SCM code. It will have following fields:

* Download bulk upload format
* Upload bulk file
* Sr No
* Karagir
* Item
* Category
* Exact Wt
* Wight Range
* Size range
* Purity range
* Karagir wt range
* Knock off wt range
* Karagir size range
* Open Qty

Users will have to first download the bulk format file. Once user clicks on bulk upload format, excel file will get downloaded which will have following columns:

* Item
* Category
* Size range
* Weight range
* Exact wt
* Purity range
* Karagir weight range
* Knockoff weight range
* Karagir size range
* Open Qty

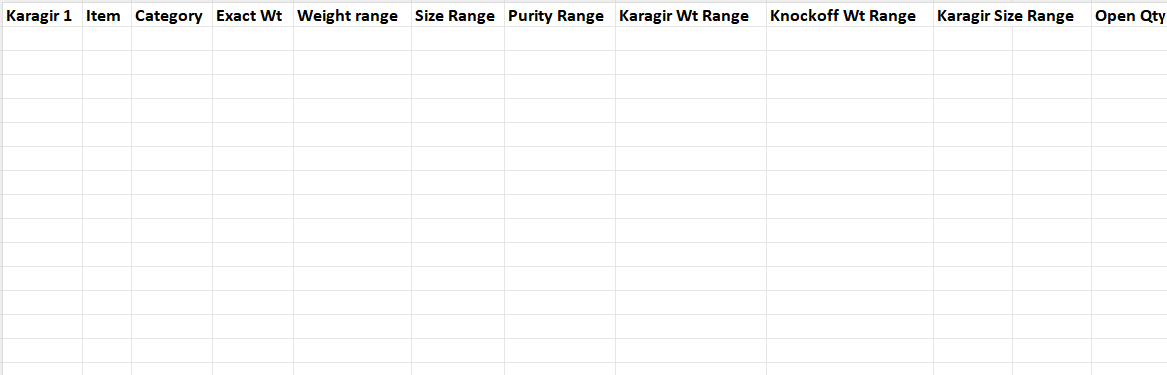


Fig: Generate Requisition Menu -> Download bulk format

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE** | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Karagir | Text | Mandatory | User will enter the name of the vendor to whom this order is given.  User should enter the exact name from connect us -> bill checking -> vendor master which are active only. |
| Item | Text | Mandatory | User will mention item name from the connect us 1.0 -> SCM master gold. |
| Category | Text | Mandatory | User will mention category name from the connect us 1.0 -> SCM master gold for that item. |
| Exact Wt | Text | Mandatory | User will mention the exact wt of the item - category which will be between mentioned weight range only. |
| Weight Range | Text | Mandatory | User will mention weight range from the SCM master gold connect us 1.0 -> for that item -category. |
| Size Range | Text | Mandatory | User will mention size range from the SCM master gold connect us 1.0 -> for that item -category. |
| Purity Range | Text | Mandatory | User will mention purity range from the SCM master gold connect us 1.0 -> for that item - category. |
| Karagir Wt Range | Text | Mandatory | User will enter the Karagir wt range that that means weight range as per karagir’s record.  Validation: Karagir wt range can be different from weight range column but Karagir wt range has to be between or equal to mentioned weight range only. |
| Knock off Wt Range | Text | Mandatory | User will mention the weight range against which we have to map the pcs with net wt field of labeling file once uploaded.  Validation: Knockoff wt range can be different from weight range column but knock off wt range has to be between or equal to mentioned weight range only. |
| Karagir Size Range | Text | Mandatory | User will enter the Karagir size range for that item - category.  Validation: Karagir size wt range can be different from SCM size range column but karagir size range has to be between or equal to mentioned SCM size range only. |
| Open Qty | Text | Mandatory | User will enter the min qty required at branch i.e. Reorder level |

Once user uploads the bulk order file through upload button and clicks on submit button, the data will be displayed at the grid view.

* 1. **GENERATE PO :**

Once the excel file is successfully uploaded in the generate requisition menu, user will select the required details and enter Order Qty to be given to Vendor in this menu.

**Step 1 -** User will select the vendor name and delivery date of the order to be given.

**Step 2 -** User will select the Item- Category from the drop- down, upon selection, the knockoff wt range, karagir size range, Exact Wt, Open Qty, Order Qty fields will be displayed in table view.

**Step 3 -** User will enter order qty i.e count of pcs / order that is to be given to Karagir for particular SCM (item - category - weight range - size).

**Step 4 -** User can filter down the data by knock off weight range and size range as well and enter the order Qty for filtered data.

**Step 5 -** User will save the details entered and can add order Qty for more SCM (item - category - weight range - size) by clicking on ‘save and add more’.

**Step 6 -** Upon clicking on save button, user can review all the records added and can edit/delete them.

**Step 7-** After clicking on submit button, user will be redirected to the home screen. User can now download the PO bulk upload format file.

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE** | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Vendor Name | Drop-down | Mandatory | User will select the vendor name from the drop-down.  Drop- down will display the Karagir names which was mentioned in the uploaded bulk file in generate requisition menu. |
| Delivery date | Date picker | Mandatory | User will enter the delivery date on which the order is expected to be delivered by the vendor at inventory. |
| Item -> Category | Drop-down | Mandatory | User will select the item->category for which the order is to be placed.  The drop-down values will be fetched from the uploaded excel file in generate requisition menu. |
| Filter | Button | Optional | User can drill down the data by using filter. Once the user clicks on filter button, weight and size filter will be displayed. Upon selecting the weight and size, filtered record will be displayed in table view. |
| Weight range (Knock off weight range) | Dropdown | Optional | User can enter order Qty by filtering specific weight range.  The dropdown values of this field will be fetched from the uploaded excel file in generate requisition menu from the Knock off Wt Range column. |
| Size range | Dropdown | Optional | User can enter order Qty by filtering specific size range.  The dropdown values of this field will be fetched from the uploaded excel file in generate requisition menu from the Size Range column. |
| Knock off Wt Range | Text | Mandatory | User can view the knock off weight range for the selected item category or according to the filters applied.  This record will be fetched from the uploaded excel file in generate requisition menu.  Validation:  It will be readable only. |
| Karagir Size range | Text | Mandatory | User can view the karagir size range for the selected item category or according to the filters applied.  This record will be fetched from the uploaded excel file in generate requisition menu.  Validation:  It will be readable only. |
| Exact Weight | Text | Mandatory | User can view the Exact Wt for the selected item category or according to the filters applied.  This record will be fetched from the uploaded excel file in generate requisition menu.  Validation:  It will be readable only. |
| Open Qty | Text | Mandatory | User can view the Open Qty for the selected item category or according to the filters applied.  This record will be fetched from the uploaded excel file in generate requisition menu.  Validation:  It will be readable only. |
| Order Qty | Text | Mandatory | User will mention the pcs count which are to be ordered from the vendor for that SCM code.  Validation-  It should accept only numbers.  0 should not be accepted. |
| Save and Add more | Button | Optional | User can add more records by clicking on save and add more. Once the user clicks on the button, add screen should be displayed. |
| Save | Button | Mandatory | Once the user clicks on save button, a new screen with all the records should be displayed.  Below fields will be displayed in the grid view:   * Item * Category * Knock off wt Range * Karagir size range * Order Qty * Action- Edit, Delete * Add * Submit   Order Qty - If the user saves the order Qty twice for same item category multiple times, then on review page the collated order Qty for that item - category should be displayed. |
| Submit | Button | Mandatory | Upon clicking on submit button, user will be redirected to the home screen.  The PO Bulk upload file button will be enabled. |
| PO Bulk Upload File | Button | Mandatory | Before submitting the order Qty, this button will be disabled.  Once the user submits the order Qty for SCM, this button will be enabled.  Once the users clicks on this button, excel file should be downloaded in the system with the submitted details.  This file will have below columns.   * Delivery date * Order date * Karagir * Item * Category * Size range * Weight range * Exact wt * Purity range * New order * Karagir weight range * Knockoff weight range * Karagir size range |

* 1. **ORDER HSITORY:**

User should be able to view history of submitted records in this menu.

It will have below fields:

* From Order date
* To Order date
* From delivery date
* To delivery date
* Vendor name
* Search Button
* Reset Button
* Export button

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE** | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| From Order Date | Calender picker | Optional | User will select the order date from which the history is to be extracted.  Validation: It will be single select. It should accept back dates as well as future dates. |
| To Order Date | Calender picker | Optional | User will select the order date till which the history is to be extracted.  Validation: It will be single select. It should accept back dates as well as future dates. It should disable the dates before selected ‘from order date’. |
| From Delivery date | Calender picker | Optional | User will select the delivery date from which the orders will be displayed in history.  Validation: It will be single select. It should accept back dates as well as future dates. |
| To Delivery date | Calender picker | Optional | User will select the delivery date till which the orders will be displayed in history.  Validation: It will be single select. It should accept back dates as well as future dates. It should disable the dates before selected ‘from order date’. |
| Vendor name | Drop-down | Optional | User can search the orders by selecting specific vendor here.  Validation: It will be multi-select. It should disable already selected vendor from the drop-down list. |
| Search | Click | - | Once user clicks on search button, the history will be displayed in grid and export button will be displayed.  History will display the details of each vendor, order and SCM code. It will have following columns:   * Sr no. * Order date * Delivery date * Karagir * Item * Category * Knock off Wt range * Karagir Size range * Purity range * Order Qty * Created at * Created by |
| Export | Click |  | Export button will be display after user clicks on search and data will be displayed.  Once user clicks on export button, excel file will be downloaded displaying data in following columns:   * Sr no. * Order date * Delivery date * Karagir * Item * Category * Knock off Wt range * Kargir Size range * Purity range * Order Qty * Created at * Created by   Downloaded excel file name will be Order History. |

* 1. **VENDOR EXPORT REPORT:**

Users should be able to export file with order details for SCM which can be sent to vendor.

It will have below fields:

* From Order date
* To Order date
* From delivery date
* To delivery date
* Vendor name
* Search Button
* Reset Button
* Export button

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE** | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| From Order Date | Calender picker | Optional | User will select the order date from which the report is to be extracted.  Validation: It will be single select. It should accept back dates as well as future dates. |
| To Order Date | Calender picker | Optional | User will select the order date till which the report is to be extracted.  Validation: It will be single select. It should accept back dates as well as future dates. It should disable the dates before selected ‘from order date’. |
| From Delivery date | Calender picker | Optional | User will select the delivery date from which the orders will be displayed in report.  Validation: It will be single select. It should accept back dates as well as future dates. |
| To Delivery date | Calender picker | Optional | User will select the delivery date till which the orders will be displayed in report.  Validation: It will be single select. It should accept back dates as well as future dates. It should disable the dates before selected ‘from order date’. |
| Vendor name | Drop-down | Optional | User can search the orders by selecting specific vendor here.  Validation: It will be multi-select. It should disable already selected vendor from the drop-down list. |
| Search | Click | - | Once user clicks on search button, the records will be displayed in grid.  Report will display the details of each vendor, order and SCM code. It will have following columns:   * Order date * Delivery date * Item * Category * Purity * Karagir Wt Range (Rename to Weight range) * Karagir Size range (Rename to size range) * Exact Weight * Ordered Qty |
| Export | Click |  | Once user clicks on export button, excel file will be downloaded displaying data in following columns:   * Order date * Delivery date * Item * Category * Purity * Karagir Wt Range (Rename to Weight range) * Karagir Size range (Rename to size range) * Exact Weight * Ordered Qty   Downloaded excel file name will be Vendor export report. |

* 1. **ORDER QTY REPORT:**

User can view the total ordered qty for specific Item- category, vendor name, order date, delivery date.

It will have below fields:

* From Order date
* To Order date
* From delivery date
* To delivery date
* Vendor name
* Item
* Category
* Search Button
* Reset Button
* Export button

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE** | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| From Order Date | Calender picker | Optional | User will select the order date from which the report is to be extracted.  Validation: It will be single select. It should accept back dates as well as future dates. |
| To Order Date | Calender picker | Optional | User will select the order date till which the report is to be extracted.  Validation: It will be single select. It should accept back dates as well as future dates. It should disable the dates before selected ‘from order date’. |
| From Delivery date | Calender picker | Optional | User will select the delivery date from which the orders will be displayed in report.  Validation: It will be single select. It should accept back dates as well as future dates. |
| To Delivery date | Calender picker | Optional | User will select the delivery date till which the orders will be displayed in report.  Validation: It will be single select. It should accept back dates as well as future dates. It should disable the dates before selected ‘from order date’. |
| Vendor name | Drop-down | Optional | User can search the orders by selecting specific vendor here.  Validation: It should disable already selected vendor from the drop-down list. |
| Search | Click | - | Once user clicks on search button, the records will be displayed in grid.  Report will display the details of each vendor, order and SCM code. It will have following columns:   * Order date * Delivery date * Item * Category * Purity * Karagir Wt Range (Rename to Weight range) * Karagir Size range (Rename to size range) * Exact Weight * Ordered Qty * Total Order Qty   Total Order Qty - Total order Qty as per the applied filters should be displayed. |
| Export | Click |  | Once user clicks on export button, excel file will be downloaded displaying data in following columns:   * Order date * Delivery date * Item * Category * Purity * Karagir Wt Range (Rename to Weight range) * Karagir Size range (Rename to size range) * Exact Weight * Ordered Qty * Total Order Qty   Downloaded excel file name will be Order Qty report. |

1. **REFERENCES OF THE USERS**

|  |  |  |  |
| --- | --- | --- | --- |
| **User** | **Name** | **Mail** | **Contact number** |
| **Actual user** | Aditya Shah | [aditya@techneai.com](mailto:aditya@techneai.com) |  |
| **Ticket created by (if any)** | Sanika Dewoolkar | [Sanika.dewoolkar@techneai.com](mailto:Sanika.dewoolkar@techneai.com) |  |
| **Assigned business analyst** | Sanika Dewoolkar | [Sanika.dewoolkar@techneai.com](mailto:Sanika.dewoolkar@techneai.com) |  |
| **Assigned developer** | Jaydeep Patil  Somya Ranjan | [Jaydeep.patil@techneai.com](mailto:Jaydeep.patil@techneai.com)  [somyaranjan.sethy@techneai.com](mailto:somyaranjan.sethy@techneai.com) |  |
| **Assigned tester** | Vaishnavi K | [vaishnavi.khandwe@techneai.com](mailto:vaishnavi.khandwe@techneai.com) |  |