Power Weave Software Services LLC

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Advantage Group- Order Management System

Specification Document

Dated: 25th Dec, 2014

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1.0. Introduction

1.1. Purpose

The purpose of this document is to present a detailed description of the Order Management System for Advantage Group's customers (Distributor). It will explain the purpose and features of the system, what the system will do, the constraints under which it must operate and how the system will react with external entity. This document is intended for both the stakeholders and the developers of the system.

1.2. Scope of Project

This software system is an Order Management System for Advantage Group for their customers (distributors in promotional industries). This system will be designed to manage enquiries, sales orders and purchase order, to keep track of the entire sales process staring from enquiry initiation to fulfilment of customer's requirements. This is an order management system that will help sales manager and its team to log enquiries, allocate enquiries, calculate profit margins on enquiries/orders, sales order processing and preparation of purchase order.

System to be built will be integrated with Advantage group web site and also with the distributor's web portal in order to fetch product and supplier related information. At the same time the system will provide administration functionalities to control the entire process and way of communication.

1.3. Glossary

Term	Definition
Enquiry	Sales Enquiry comes from customer.
Enquiry Quote	This is final confirmation to customer on enquiry before converting enquiry to order.
Sales Order	Enquiries are getting converted to Sales Order.
Supplier	Supplies products (raw materials or imprinted products) to customer.
Brander	Does the job of branding i.e. imprinting art on product.
Mark-up	Profit margin on cost price.
Item Cost	Supplier price.
Origination Cost	Setup charge.
Print Cost	Run charge
Carriage Cost	Shipping cost
Backend Field	This field will not appear on front end.

1.4. Overview of Document

The next sections of the document define different modules of the system and detail requirements of each module with functionality.

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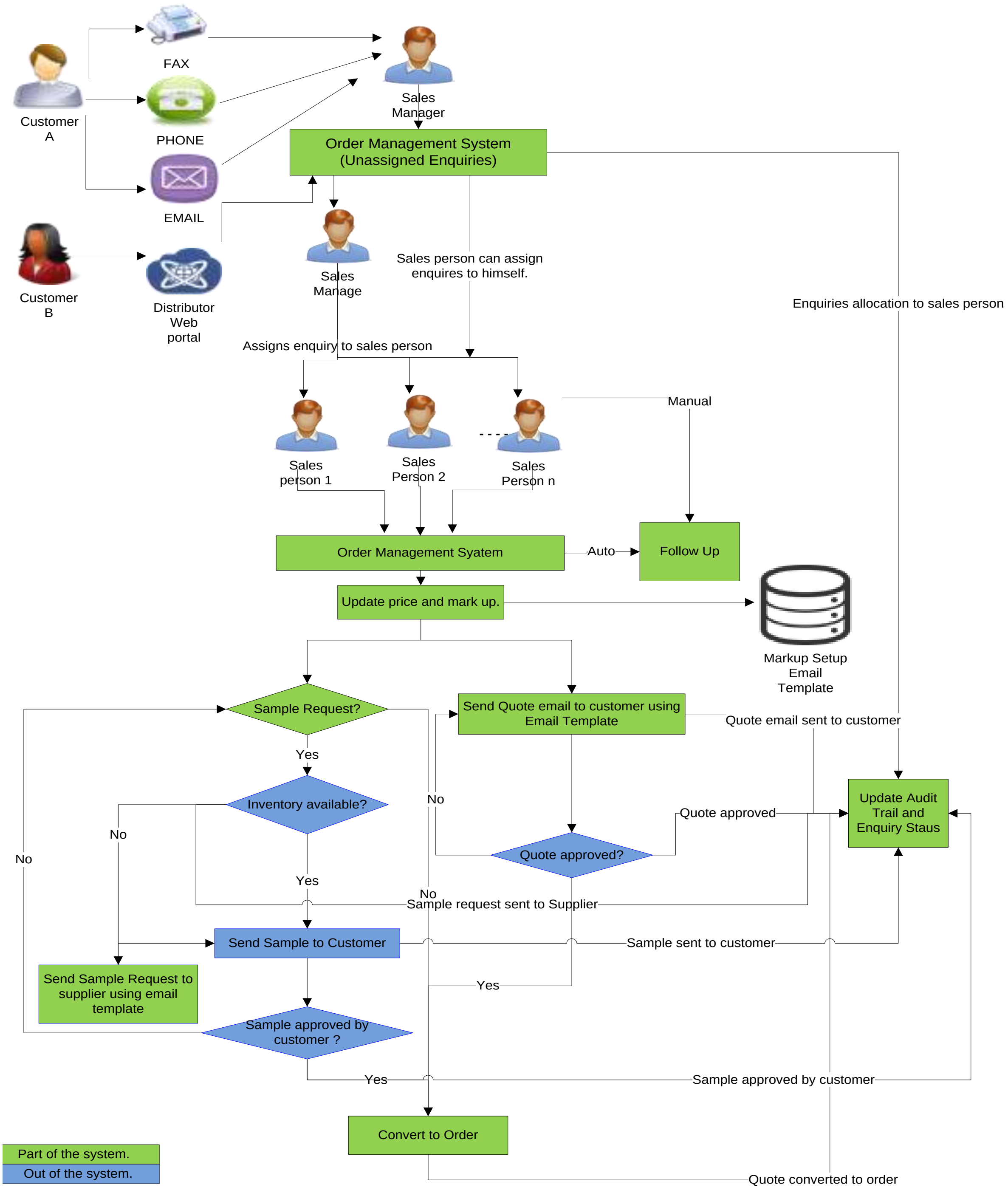
2.0. Enquiry

Enquiries are the very initial and important step to start the sales process for Advantage customers (Distributors). Enquiries are coming into the system through distributor's web portal or user manually enters enquiry for customer. Figure below shows basic flowchart of enquiry module.



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Enquiry module has following pages:

2.1. Enquiry List Page:

This page has all allocated and unallocated enquiries along with their status. All enquiries (manual and web enquiries) are displayed on Enquiry List page. Enquiry List Page has three sections,

- Unallocated Enquiries
- Allocated Enquiries
- Orders

All these sections show records in tabular format and only be visible if one or more records exists in respective sections.

Unallocated Enquiries:
This shows list of all unallocated (unallocated) enquiries.

Enquiries	Organisation / Customer	Supplier	Product	Enquired Date
CG-3431	Premium Incentives Ltd.(Jason Blackbum)	Cougar Products UK Limited Cougar Products UK Limited	1. Cat Shape Tape Dispenser - Air(x2000 1/1) 2.White Dog Shape Tape Dispenser - Air (x2000 1/1)	12/05/2014
CG-3421	Streamline Corporate (Claire Paterson)	Cougar Products UK Limited Cougar Products UK Limited	1.Dual USB Car Charger Adaptor (x1000 2/1) 2.Dual USB Car Charger Adaptor - Sea (x5000 2/1)	08/05/2014
CG-3420	Bourne International Limited (Carin Kingston)	G Brooks & Co Ltd G Brooks & Co Ltd G Brooks & Co Ltd	1.Aluminium Card Holder (x50 L/1) 2.Aluminium Card Holder (x100L/1) 3.Brass Card Holder Shiny Finish (x50 L/1)	06/05/2014

Grid has search boxes at the top of every field so that user can search by providing value in one or more search field. Also grid allows sorting enquiries in ascending and descending order by column. By clicking enquiry no. on records system redirect user to enquiry detail page where user can view and edit enquiry details. Enquiry can be allocated to sales person by sales manager or sales person can assign enquiry to himself or herself.

Allocated Enquiries:
This shows list of all allocated enquiries.

User	Enquiries	Organisation / Customer	Supplier	Product	Enquired Date	Actions	Status
Herman	CG-3410	Premium Incentives Ltd.(Jason Blackbum)	1.Cougar Products UK Limited	1.Cat Shape Tape Dispenser - Air(x2000 1/1)	12/05/2014	Follow Up	

			2.Cougar Products UK Limited	2.White Dog Shape Tape Dispenser - Air (x2000 1/1)			
Herman	CG-3411	Streamline Corporate (Claire Paterson)	1.Cougar Products UK Limited 2,Cougar Products UK Limited	1.Dual USB Car Charger Adaptor (x1000 2/1) 2.Dual USB Car Charger Adaptor - Sea (x5000 2/1)	08/05/2014		
Herman	CG-3412	Bourne International Limited (Carin Kingston)	1.G Brooks & Co Ltd 2.G Brooks & Co Ltd G Brooks & Co Ltd	1.Aluminium Card Holder (x50 L/1) 2.Aluminium Card Holder (x100L/1) Brass Card Holder Shiny Finish (x50 L/1)	06/05/2014		

By default gird shows all live (open enquiries not converted to order or not has been closed yet by any reason) enquiries allocated to log in user at the top priority and again all urgent enquiries at the top. Urgent enquiries are those are awaiting urgent follow ups. Enquiries to be followed up on urgent basis are marked with different colour as per color-codes setup (refer section).
Grid has search boxes at the top of every field so that user can search by providing value in one or more search field. Also grid allows sorting enquiry records in ascending and descending order by column.
At the top of the grid there is a check box- *Show all*. Checking this system displays all enquiries in same priority as mentioned above.

Orders:
This shows all orders converted from enquiries.

User	Order	Organisation / Customer	Supplier	Product	Order Date	Actions	Status
Herman	SO-1025	Premium Incentives Ltd.(Jason Blackbum)	Cougar Products UK Limited	Cat Shape Tape Dispenser - Air(x2000 1/1)	12/05/2014		
Herman	SO-1099	Streamline Corporate (Claire Paterson)	Cougar Products UK Limited	Dual USB Car Charger Adaptor (x1000 2/1)	08/05/2014		
Herman	SO-1108	Bourne International Limited (Carin Kingston)	G Brooks & Co Ltd	Aluminium Card Holder (x50 L/1)	06/05/2014		

Grid has search boxes at the top of every field so that user can search by providing value in one or more search field. Also grid allows sorting sales order records in ascending and descending order by column.
At the top of the grid there is a check box- *Show all*. Checking this system displays all sales orders but in same priority as mentioned above.
By clicking sales order no. on records system redirect user to enquiry detail page where user can view and edit sales order details.

List page has following features,

1. System allows user to sort and search enquiries by following parameters and combination of parameters,
   - Sales Person,

- Enquiries
- Organisation/Customer Name
- Supplier Name
- Product
- Enquiry Date
- Action
- Status

2. Action
   Action defines what needs to be done on enquiry or what action has been taken on enquiry.

3. Status
   This shows current status of the enquiry. Statuses like,
   - No order - speculative enquiry
   - No order - expected in future
   - No order - on hold pending decision
   - No order - unable to source product
   - No order - unsuitable product
   - No order - other/unknown reason
   - Ordered elsewhere - too slow to respond
   - Ordered elsewhere - due to cost
   - Ordered elsewhere - other/unknown reason

4. Colour coding to highlight enquiries with urgent follow ups.
   Urgent follow ups are those which need to be followed up on current date.
5. Action field has following statuses,
   - Blank (Unallocated enquiry)
   - Initial Follow-up (Once order converted to quote converted to quote)
   - Follow-ups (Manual follow-ups)
   - Re-Quoted (Through re-quote action on enquiry)
   - Order placed (Once quote converted to order)
   - Diarised instruction – with text (would be better if note can have a “title” and separate text – title only to be used here.
6. Create new enquiry – This is link on enquiry listing page, allows user to create new enquiry.

2.2. Create an Enquiry:

This page is used for creation of new enquiry. This page is divided in multiple sections such as the following;

a. General
b. Enquiry Details
c. Notes
d. Audit Trail
e. Follow Ups

f. Upload Documents
g. Sample Request

2.2.1. General:

This section will have the following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Enquiry No.	Text			Auto generated field based on the no. series format set for Enquiry module. (Refer NO. Series from master data management section)
Enquiry Date	Date			By default current date. Calendar control for date selection.
Organisation / Customer	Text	1. Mandatory field. (No post back) 2. Organisation /Customer name should be from customer master table.(Post back)	1. Please select organisation. 2. Customer does not exist.	Predictive search field with drop down to select customer from list.(Refer customer master from master data management section)
Contact	Text	1. Mandatory field.(No post back)	1. Please provide contact for customer.	Default contact person from customer card. Predictive search field with drop down to select contact from contact list for customer.(Refer customer contact from master data management section)
Phone No.	Text	Mandatory		Default phone number from

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		Field		customer card. Editable. User has to provide either phone no. or mobile no. in order to process enquiry.
Mobile No.	Text	Mandatory Field		Default phone number from customer card. Editable. User has to provide either phone no. or mobile no. in order to process enquiry.
Email	Text	Email addresses format check.(No post back) Mandatory Field.	Please provide valid email ID	Default email ID from customer card. Editable field.
Estimated Spend	Decimal	Allows only positive Decimal (No post back) Mandatory Field.		By default blank.
Address 1				Address of selected customer contact. Editable.
Address 2				Address of selected customer contact. Editable.
Town				Town of selected customer contact. Editable.
County				County of selected customer contact. Editable.
Country				Country of selected customer contact. Editable.
Probability	Decimal	Allows only positive Decimal (No post back) Mandatory field	Please provide probability.	By default blank.
Required By	Date.	Date	Required by	Calendar control for date

		validation. (No post back)	date should be greater than Enquiry Date	selection. By default blank.
Source	Text	Mandatory field.		By default blank. Drop down with values from Enquiry source table.(Refer enquiry source setup section of Master Data Manipulation)
Complete Status	Text			By default blank. Drop down with values, Blank, Re-Quoted, Order placed, No order - speculative enquiry, No order - expected in future, No order - on hold pending decision, No order - unable to source product, No order - unsuitable product, No order - other/unknown reason, Ordered elsewhere - too slow to respond, Ordered elsewhere - due to cost Ordered elsewhere - other/unknown reason (Enquiry marked complete or closed can again be available for process by changing status to blank or to any other not finalise status)
User	Text			Logged in user id. Value assigned as enquiry created in the system. Back end field.
Assigned to	Text			Default blank. Select one from user list.

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				(Refer user table from master data manipulation section)
Cost	Decimal			Auto calculate field as per values in item cost and related charges. Non editable.
Sell	Decimal			Auto calculate field as per values in item price and related charges. Non editable.
Profit	Decimal			Difference between Cost And Sell. Non editable.
Margin	Decimal			Percentage of profit. Non editable.
Most likely qty.	Boolean			Line with this field marked true is only considered while generating report for enquiries. It is mandatory that each enquiry should have at least one line with this field marked true.

System automatically checks whether customer exists in the system or not. If customer does not exist in the system then system prompts the user to create a new customer. Next to *Organisation / Customer* field on enquiry page there is a button *Create Customer* to create new customer. On click action of this button will open customer card page as a popup and allows user to create customer and relate that customer to enquiry while working on enquiry.

2.2.2. Enquiry Details:

This section captures details about the enquiry such as item, supplier, quantity, cost, pricing, etc. This section will have the following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Enquiry No.	Text			Default enquiry no. from current document.
Line No.	Integer			Identity column. Back end field.
Item No.				Predictive search field with dropdown to select product from list. Product list is fetched from web

				portal database and not from local database.
Item Title	Text	1. Mandatory field. (No post back) 2. Product existence.(Post back)	1. Please provide product name. 2. Product does not exist.	Automatically get filled as per item selected.
Description	Text			Item description as per item selected in item no. field.
Supplier	Text	1. Mandatory field. (No post back) 2. Supplier existence.(Post back)	1. Please provide supplier. 2. Supplier does not exist.	Supplier name is populated as per product selected in product field. Editable. Predictive search field to with dropdown to select supplier from list.
Branding	Text			Drop down list. Values from branding option table.
Quantity	Decimal	Mandatory field. (No post back)	1. Please provide product quantity.	Manual field.
Item Cost	Decimal	Mandatory field. (No post back)	1. Please provide product cost.	This is Purchase Cost. Item cost is automatically populated as per product and quantity selected. Editable.
Print Cost	Decimal			This is Run Charge. Print cost is get automatically populated as per product and quantity selected. Editable.
Origination Cost	Decimal			This is Setup Charge. Origination cost is get automatically populated as per product and quantity selected. Editable.

				Automatically calculate as per no. of imprint colours selected.
Carriage Cost	Decimal			Shipping charges are get automatically populated as per product and quantity selected. Editable
Selling Price	Decimal			Automatically filled up as per item and quantity selected. Otherwise, Auto calculated field based mark-up defined in the system. Editable. (Refer mark-up setup from master data manipulation section).
Origination Price	Decimal			Automatically filled up as per item and quantity selected. Otherwise, Auto calculated field based mark-up defined in the system. Editable. (Refer mark-up setup from master data manipulation section).
Carriage Price	Decimal			Automatically filled up as per item and quantity selected. Otherwise, Auto calculated field based mark-up defined in the system. Editable. (Refer mark-up setup from master data manipulation section).
Cost	Decimal			Auto calculate field as per values in item cost and related charges. Non editable.
Sell	Decimal			Auto calculate field as per values in item price and related charges. Non editable.
Profit	Decimal			Difference between Cost And Sell. Non editable.
Margin	Decimal			Percentage of profit. Non editable.

If quantity breaks for an item are 250, 500 and 1000, and a item quantity entered on enquiry line is 750, then the costs would be calculated based on the 500 rate, but the carriage cost remains blank. The carriage would only default where an exact quantity of 250, 500 or 1000 were entered.
Each line has an option to create exact copy of that line so that to enter same product of different quantity. Pricing and cost information changes as per quantity entered.

2.2.3. Notes:

This section keeps track of all notes for the current enquiry. User can add notes about the enquiry and can mark notes to specific users' notification. This section will have the following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Enquiry No.	Text			Default enquiry no. from current document.
Enquiry Line No.	Integer			Backend field. Blank if comment is about enquiry. Line No. from enquiry line table if comment is about enquiry line.
ID	Integer			Backend field. Identity field.
Title	Text			Title of notes.
Notes	Text			Manual field to add comments at different stages of enquiry processing.
Date	Date time			System takes current date time. Backend field.
User	Text			User ID who placed the notes. Backend field and it takes by default logged in user ID.
Action for	Text			User id of the user who supposed to take given action. Dropdown to select user from list of user. Predictive search field.
Action by	Date			Date by which user has to take action on the notes. Calendar control to select date.

Add notes: Action button to add new notes/comments.

2.2.4. Audit Trail:

This section keeps track of all actions placed on the enquiry throughout the enquiry process. Audit trail entries automatically recorded by the system basis the action taken on the enquiry.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
ID	Integer			Identity field.
Table Name	Text			Modified table name.
Primary Key	Text			Primary key values of modified record.
Field Name	Text			Modified field name.
Old Value	Text			Value before modification.

New Value	Text			Modified value.
Change Type	Text			Drop down list with values Insert, Modify, Delete
Date	Date Time			Modification date time.
User ID	Integer			Backend field. User id of logged in person.
Impersonate User	Boolean			Decides whether Advantage user logged into the system to impersonate distributor user.
User ID	Integer			Backend field and it takes by default logged in user ID. If Impersonate User is true then this will have Advantage's user ID.

2.2.5. Follow Ups:

This section keeps track of all follow ups placed on the enquiry. Follow ups will have the following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Enquiry No.	Text			Default enquiry no. from current document.
Enquiry Line No.	Integer			Blank if comment is about enquiry. Line No. from enquiry line table if comment is about enquiry line.
ID	Integer			Backend field. Identity field.
Description	Text			Description.
Date	Date time			System takes current date time. Backend field.
User	Text			Backend field and it takes by default logged in user ID.
Action for	Text			User id of the user who supposed to take given action. Dropdown to select user from list of user. Predictive search field.
Action By	Date			Date on which follow up should happened.

User can set follow ups for himself or for other users.

2.2.6. Upload Documents:

This section list out all documents attached to an enquiry and allows user to further attach multiple documents. All documents sent out of the system are saved as an attachment. This section has following fields:

Attribute	Data Type	Validatio	Validation Message	Comments/Description /Business Rules
Enquiry No.	Text			Default enquiry no. from current document.
Enquiry Line No.	Integer			Blank if document is about enquiry. Line No. from enquiry line table if document is about enquiry line.
ID	Integer			Identity field. Backend field.
Description	Text			Description of the document uploaded.
File Path	Text			Full path of the uploaded file. Backend field.
File Name	Text			Name of the file uploaded. Backend field.
Show on order	Boolean			Decides whether to attach same document on order. By default true.

There will be an action button to upload document. Addition to this system has feature to drag and drop file from user's computer location and also emails from user's outlook.

2.2.7. Sample Request

Customer may request for sample while placing enquiry. If enquiry has sample request then first sample request gets fulfilled and then as per the feedback from the customer, enquiry gets converted to order. Sample request get processed as follows:

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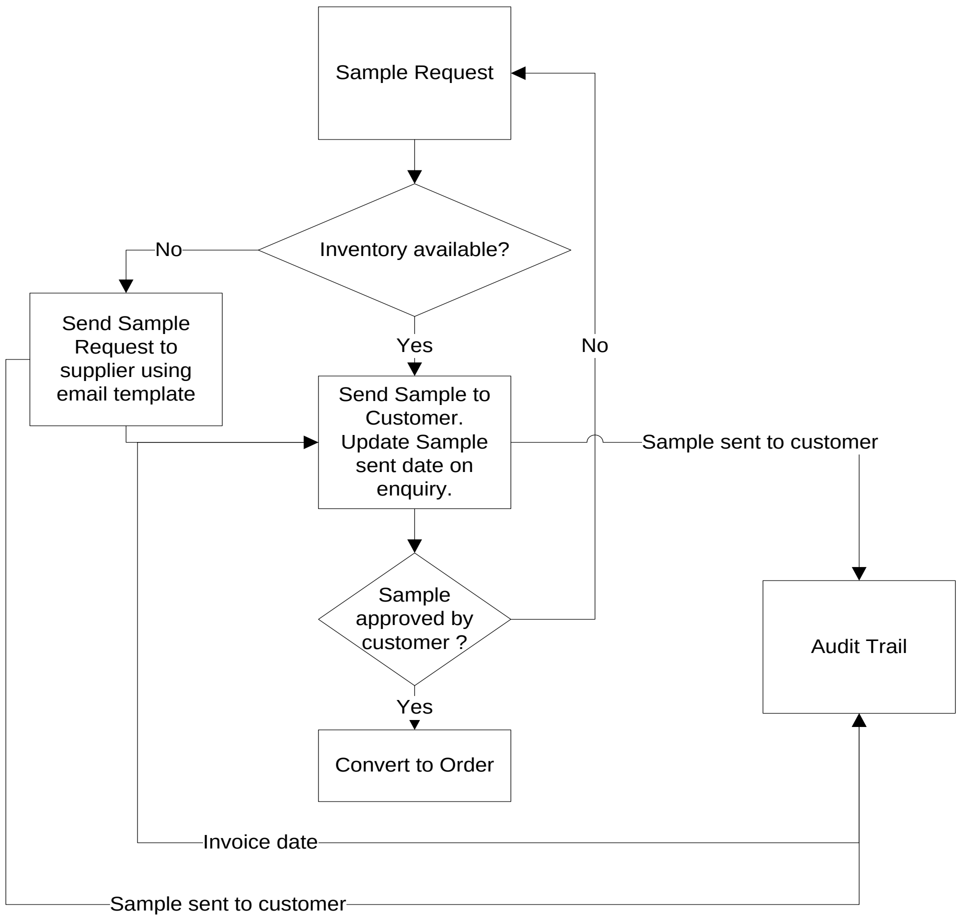


Sample Request Process:

1. Sample request may get processed simultaneously with enquiry quote process or may be before or after enquiry quote. Fields in this section are mandatory only if customer has asked for sample product, otherwise not.
2. If stock is available to fulfil the sample request then delivery sample note created, printed and dispatched to sample department.
3. System has setup to decide whether to charge customer for sample request or not and also to decide period in days to generate sample invoice. Based on these two factors system alerts account department to prepare invoice for customer.
4. If customer returns back the sample product then sample request invoice will not be prepared.
5. System keeps track of whether supplier invoice received or not.
6. System has check box to show supplier credit for returned sample to supplier.
7. Sales user can set sample product price and carriage price so that to inform account department about sample request invoice amount.
8. Sales person can approve supplier invoice against sample request so that to Account department make payments against. System has this provision in Sales & Marketing dashboard.

Sample request section on Enquiry page has the following fields. :

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Enquiry No.	Text			Default enquiry no. from current document.
Enquiry Line No.	Integer			Line No. from enquiry line table if comment is about enquiry line.
ID	Integer			Backend field. Identity field.
Sample Required	Boolean			Decides whether customer required sample product or not.
Product	Text			Product code for selected enquiry line. Auto field.
Sample Description	Text			Item description from enquiry page. Auto filled.
Sample Quantity				Sample quantity.
Product Colour	Text			Product colour for selected enquiry line. Auto field.
Printed	Boolean			To decide whether printed sample required or not.
Invoiceable by Supplier	Boolean			Decides whether sample is invoiceable by supplier or not.
Customer Invoice Date	Date			Manual field to inform accounts dept. on which date invoice for this sample request has to be prepared. System sets follow up as per the date provided for invoice.
Return Sample to Supplier	*Boolean*			Decides whether customer return sample to supplier or not.
Return Sample by date	Date			Date by which sample should be return to supplier. System sets follow up as per the date provided for sample return.
Return Sample	Boolean			Decides whether customer return sample or not.
Return by Date	Date			Date by which customer should return sample. System sets follow up

				as per the date provided for sample return. (Refer Company setup section)
Free Sample by Supplier	Boolean			Decides whether supplier gives this sample for free or not.
Free Sample	Boolean			Decides whether this sample is free for customer or not.
On Stock	Decimal			Shows value of stock available for give product.
From Stock	Boolean			To decide whether to fulfil sample request from stock or not. N/A when no stock available.
From Supplier	Boolean			To decide whether to request sample from supplier or not?
Sample Requested	Boolean			Indicate whether sample request has been sent to supplier or not.
Sample Request Date	Datetime			Date of sample request sent to Supplier.
Supplier Invoice Approved	Boolean			Manual field. User will update this field to TRUE; intimate supplier invoice received by Account department is approved.

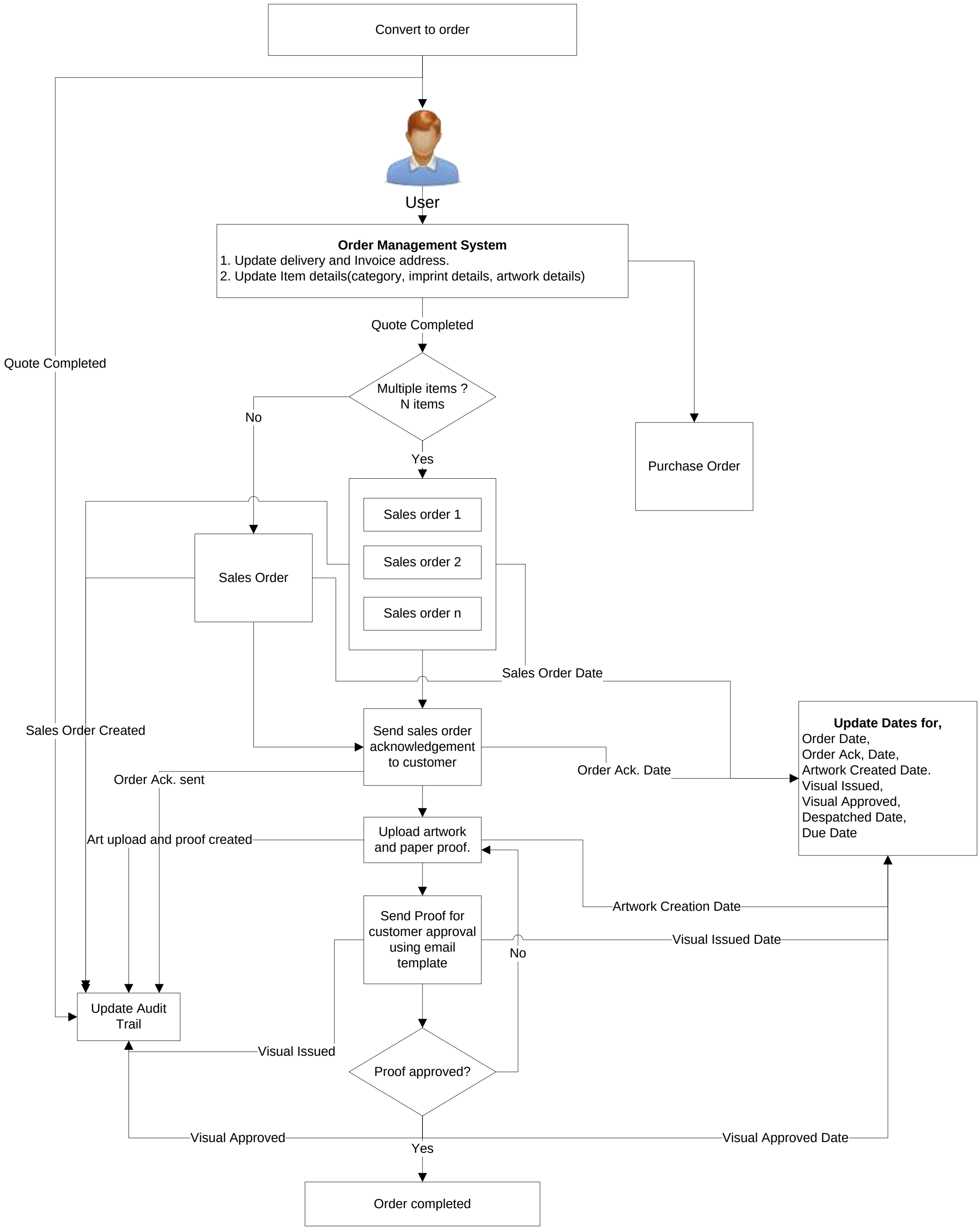
Request Sample (Button): This button performs the action of sending Sample Request to supplier for given product.
On Click event of this button, system opens email template page which populate default parameters from email template table. For email template refer Email Template Configuration section.

Send Quote to Customer (Button):
Once all enquiry details has been entered and customer has approved sample request (if sample request asked by customer), sales person sends enquiry quote to customer before converting enquiry to order. System allows user to view and amend any document sending out from system. System also stores those entire documents as quote document for reference purpose.

Re-Quote (Button):
This action allows user to create new enquiry from current enquiry. New enquiry has all details same as current enquiry and user can modify it as per requirement. New enquiry also processed the same way as normal enquiry.

3.0. Convert To Order

Below is the flowchart for convert to order process.



This action opens enquiry confirmation page which confirms enquiry before converting it into an order. This page shows all information entered on enquiry page in three different sections as follow:

- **General**
- **Details**
- **Uploaded Enquiry Documents**

3.1. General

This captures all information about payment terms, customer addresses and instructions for supplier.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Payment Terms	Text			Automatically get filled as per setup on customer card. Dropdown with values, Performa, Account
Customer Order Ref.	Text			Customer order number.
Print Name	Text			Art name.
Deliver To	Text			Customer delivery address. Editable.
Invoice To (All Items)	Text			Customer invoicing address. Editable. Same address for all items i.e. for all sales order created against enquiry.
Supplier Instructions	Text			Instruction to supplier about imprinting. This instruction only appears for supplier related documents.
Customer Instructions (All Items)	Text			Instruction from customer. Same for all items. This instruction only appears for customer related documents.

3.2. Details

All information about product added of enquiry page including quantity, cost and pricing information. User has to select the lines which item he/she wants to convert into an order.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Select	Boolean			
Ref.	Text			By default from enquiry table. Non editable.

Description	Text			By default from enquiry table. Non editable.
Supplier	Text			By default from enquiry table. Non editable.
Item Colour	Text			By default from enquiry table. Non editable.
Quantity	Decimal			By default from enquiry table. Non editable.
Item Cost	Decimal			By default from enquiry table. Non editable.
Print Cost	Decimal			By default from enquiry table. Non editable.
Origination Cost	Decimal			By default from enquiry table. Non editable.
Carriage Cost	Decimal			By default from enquiry table. Non editable.
Selling Price	Decimal			By default from enquiry table. Non editable.
Origination Price	Decimal			By default from enquiry table. Non editable.
Carriage Price	Decimal			By default from enquiry table. Non editable.

3.3. Uploaded Enquiry Documents

List of all documents uploaded while creating an enquiry.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Document Name	Text			By default from enquiry table. Non editable. Link to view document.
Description	Text			By default from enquiry table. Non editable.
Date	Date			By default from enquiry table. Non editable.
Show on Order	Boolean			Decides whether to attach same document on order.

				By default true.

3.4. Convert Selected Item:

This action on enquiry confirmation page actually converts enquiry to order. For each selected item system creates separate sales order i.e. if user has selected two items from enquiry ENQ0001, system will create two sales orders with sales order number SO0001-1 and SO0001-2 as per setup define in No. Series table (Refer master data manipulation section).

It opens new Sales Order page that has following sections,

a. General
b. Important Dates to Update
c. Sales Order Details
d. Sales Order Line Details
e. Artwork
f. Notes
g. Upload Documents

3.4.1. General

This section has all information about enquiry and supplier & customer instructions. Section has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Order No.	Text	Mandatory field. (No post back)		Automatically generated as per No. Series setup for sales order (Refer No. Series table from Master Data manipulation section). e.g. Enquiry (ENQ001) has two items in it. In this case system generates two different sales order with name like SO0001-1 and SO0001-2.
Enquiry No.	Text			Enquiry no. from enquiry page. Not editable.
Customer ID	Integer			Customer id from

				enquiry.
Customer No.	Text	Mandatory No. (No post back) Required field (Post back)		Customer no. from enquiry page comes here automatically. If corresponding Customer No. from SAGE does not exists then order will not get processed further.
Account No.	Text			Customer Account no. from customer card.
Contact	Text			Customer contact from enquiry. Editable.
Customer Order Ref.	Text			Customer Order Ref.
Phone	Text			Customer phone from enquiry. Editable.
Email ID	Text			Customer email from enquiry. Editable.
Payment Terms	Text			Dropdown with values Pro-forma and account. By default value as per selected customer.
Pro-forma Amount	Decimal			Pro-forma amount
Sent	Date			Order sent date.
Paid	Date			Payment date.
Chase Payment	Boolean			If payment terms is Pro-forma then chase payment is true
Payment Reminder Days	Integer			If payment terms is Pro-forma auto fill up from setup (refer company setup section).

3.4.2. Important Dates to update

This section contains different dates which should be filled in automatically in some cases and manually. Below is the list of all those dates and their description.

Dates	Description
Order Date	Order Date.
Order Acknowledgement (Customer)	Date on which order acknowledgement sent to customer. Automatically get filled on acknowledgement sent.
Artwork Created (Customer)	Artwork created date. Manual update.
Visual Issued (Customer)	Date on which visual (paper proof) sent to customer. Automatically updated on visual sent to customer.
Visual approved (Customer)	Date on which visual approved by customer. Manual Update.
PO Raised (Supplier)	Purchase order creation date. Auto fill date.
Order Acknowledgement (Supplier)	Date on which purchase order acknowledgement sent by supplier. Manual Update.
Artwork Supplied (Supplier)	Date on which artwork sent to supplier. Auto fill date.
Visual Approved (Supplier)	Date on which visual (paper proof) approved by customer. Manual Update.
Stock Despatched Date (Delivery)	Date on which stock has been despatched from supplier to separate marker. Manual update– this should only be displayed if separate branding has been arranged.
Despatched Date (Delivery)	Date on which product despatched to customer. Auto fill date.
Due Date (Delivery)	Actual due date of sales order as per customer’s requirement.
Final Dispatch Date	From Distributor to Customer

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Supplier	Text			Default supplier from enquiry line. Predictive search field to with

				dropdown to select supplier from list.
Supplier Contact	Text			Auto fill based on supplier.
Supplier Phone No.	Text			Auto fill based on supplier.
Supplier Order Ref.	Text			Supplier order number.
Print Name	Text			
Invoice Received	Boolean			Invoice received from supplier or not.
Waiting for Information	Boolean			Whether waiting for information from customer or not.
Artwork not required	Boolean			Artwork required or not.
Complete				By default blank. Drop down with values, Blank,
Diary Date	Datetime			Date time of order placed.
Artwork Date	Datetime			Datetime by which artwork needs to be prepared.
Urgency	Text			Drop down with values, Delivery ASAP, Delivery Critical, Delivery not urgent.
Delivery Date	Datetime			Delivery date.
Customer Reference No.	Text			Manual field.
Deliver To	Text			Customer delivery address. Editable.
Invoice To (All Items)	Text			Customer invoicing address. Editable. Same address for all items i.e. for all sales order created against enquiry.
Supplier Instructions	Text			Instruction to supplier. This instruction will appear on supplier purchase order.

Brander Instructions	Text			Instruction for brander. This instruction will only be appeared for brander purchase order.
Customer Instructions (All Items)	Text			Instruction from customer. Same for all items.
Surcharge	Decimal			Surcharge.
Surcharge Cost	Decimal			Surcharge cost.
Selling price	Decimal			Selling price.

3.4.3. Sales order details

All details about sales order item (from enquiry item lines). Sales order details page will have one or more items per enquiry.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Product	Text	1. Mandatory field. (No post back) 2. Product existence.(Post back)	1. Please provide product name. 2. Product does not exist.	By default from enquiry table. Predictive search field with dropdown to select item from list. Product list is fetched from web portal database using web services and not from local database.
Description	Text			By default from enquiry table. Editable.
Category	Text			By default from enquiry table.
Supplier Ref	Text			By default from enquiry table. Editable.
Quantity	Decimal	Mandatory field. (No post back)	1. Please provide product quantity.	By default from enquiry table. Editable.
Cost	Decimal	Mandatory field. (No post back)	1. Please provide product cost.	By default from enquiry table. Editable.
Costs	Decimal		1. Please	By default from enquiry table.

Printing			provide product cost.	
Costs Origination	Decimal		1. Please provide product cost.	By default from enquiry table.
Cost Carriage (shipping)	Decimal		1. Please provide product cost.	By default from enquiry table.
Selling price	Decimal	Mandatory field. (No post back)	1. Please provide product price.	By default from enquiry table. Editable.
Multiple Shipment	Boolean			Decides whether product has to deliver at multiple shipping addresses.

System will automatically create separate lines for different charges as per enquiry information.
If the Separate Branding option is ticked then Delivery Cost is added to sales order details as it is charge for delivering goods from supplier to brander or marker (supplier who does job of imprinting).

3.4.4. Sales order line details

This section allows user to provide detail description about sales line items i.e. imprint information. For each sales line there is one sales order line details entry. This section has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Category	Text			Drop down list with values like, Advertising and printing, Confectionery, etc.
Ref	Text			Item no. from current document.
Surcharge	Decimal			Surcharge.
Surcharge Cost	Decimal			Surcharge cost.
Selling price	Decimal			Selling price.
Artwork Required	Date			Date by which customer required artwork copy.
Urgency				Drop down with values, Delivery ASAP, Delivery Critical, Delivery not urgent.
Delivery Date	Date			Delivery date

3.4.5. Sales Line Shipment Details

This section is only be visible if *Multiple Shipment* field on any of the line on sales order has value true. This section has more than one value against sales lines if customer

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Order No.	Text			Order no. of current document. Back end field.
Line No.	Integer			Sales order line no. Back end field.
Product No.	Integer			Product No. from sales order lines.
Quantity	Decimal			Quantity to ship.
Deliver To No.	Text			Dropdown with values from customer card deliver to address list.
Deliver to Address 1	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory
Deliver to Address 1	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered.
Deliver to Town	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory
Deliver to County	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory
Deliver to Country	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory
Deliver to Post Code	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory

Deliver to Contact	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory
Deliver to Phone	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory
Deliver to Mobile	Text			Auto filled as per Deliver to No. selected. Otherwise manually entered. Mandatory

3.4.6. Artwork

This section contains information about artwork.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Item Size	Text			Item size from product data & editable.
Item Colour	Text			Item colour. Manual input.
Branding	Text			Drop down list. Values from branding options.
Artwork Size	Text			Artwork size from product data & editable
Artwork Colours	Text			Artwork colours separated by comma. Manual input.
Artwork Position	Text			Artwork position. Manual input.
Separate branding	Boolean			Decides branding needs to be done by other brander
Second Supplier	Text			Predictive search field to with dropdown to select supplier from list.

Artwork User: This option in Artwork section allows user to assign artwork creation task to artist. This is dropdown list with all employees with role Artist.

3.4.7. Notes

This section keeps track of all notes for current order. Automatic notes like, Order Created from enquiry – ENQ001 and also the manual notes user can add it, mark that notes for specific users notification. This section has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Order No.	Text			Backend field. Default Order no. from current document.
Order Line No.	Integer			Backend field. Blank if comment is about enquiry. Line No. from Order line table if comment is about enquiry line.
ID	Integer			Backend field. Identity field.
Notes	Text			Manual field to add comments at different stages of order processing.
Date	Date time			System takes current date time. Backend field.
User	Text			User ID who placed the notes. Backend field and it takes by default logged in user ID.
Action for	Text			User id of the user who supposed to take given action. Dropdown to select user from list of user. Predictive search field.
Action by	Date			Date by which allocated user has to take action. Calendar control to select date.

Add notes: Action button to add new notes/comments.

3.4.8. Despatch Details

This section allows user to enter shipping courier details and tracking number details for sales order. This information will then appear on email template.

3.4.9. Upload documents

This section list out all documents attached to order and allows user to attach multiple documents. All emails sent out of the system are saved as an attachment. This section has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules

Order No.	Text			Default order no. from current document.
Order Line No.	Integer			Blank if document is about enquiry. Line No. from order line table if document is about order line.
ID	Integer			Identity field. Backend field.
Description	Text			Description of the document uploaded.
File Path	Text			Full path of the uploaded file.
File Name	Text			Name of the file uploaded.

Upload Document: Action button to upload document.
Sales order page has multiple email template options to send email to customer and supplier at different stage of sales order processing. Below mention templates are available in the dropdown list,

- Customer – Delivery Note
- Supplier – Supplier Order
- Customer – Delivery Note
- Customer – Order Confirmation
- Customer – Order Client Pro-forma
- Customer – Order Layout for approval
- Customer - Order goods despatch
- Supplier – Order free format
- Customer - Order client progress
- Customer – Order free format
- Supplier – Artwork to supplier

All these emails are triggered as manual action.
Email template section on sales order page can be configurable using email template configuration (Refer email template configuration section).

SAVE: Saves sales order page.
Create Job Sheet (Button): This action prepare job sheet as per details entered on sales order. The format of job sheet is as shown below,

Ace Promotional Products Ltd (T/A Cougar Products) - 8434 http://192.168.16.5/order.php?page=print&order=8434&item=

Order Item Sheet
[Print]

Order: MH / 8434 / 1

Client Name:	MoJo Promotions		Cust Order No:	12380-MIC-300414-1-HG
Client Details:	Hannah Grundy	0116 261 6829	hannah@mojopromotions.co.uk	

Item

Supplier(s):	Cougar Products UK Limited		Order A/w Req'd:	30 / 04 / 14
Description:	Car/USB Mobile & Tablet Charger		Stock Reserved:	
Item Colour:	White / Blue			
Quantity:	100			
Supplier Ref:			Our Ref:	
Due Dates:	22 / 05 / 14		Req'd By Date:	22 / 05 / 14

Delivery Critical

Delivery Address needed

Pricing

Unit Cost:	100 x 0.0000		Unit Sell:	100 x 3.4800
Origination:	1 x 0.0000		Origination:	1 x 30.0000
Carriage:	1 x 0.0000		Carriage:	1 x 13.0000
Surcharges:			Surcharges:	

Artwork

Item Size:		Artwork Size:	
Print Name:	Microchip	Decoration:	Domed
Artwork Colours:	Gray PMS 431C	Artwork Position:	on end

Special Instructions

Split this section for Suppier Instructions & Client Instructions.

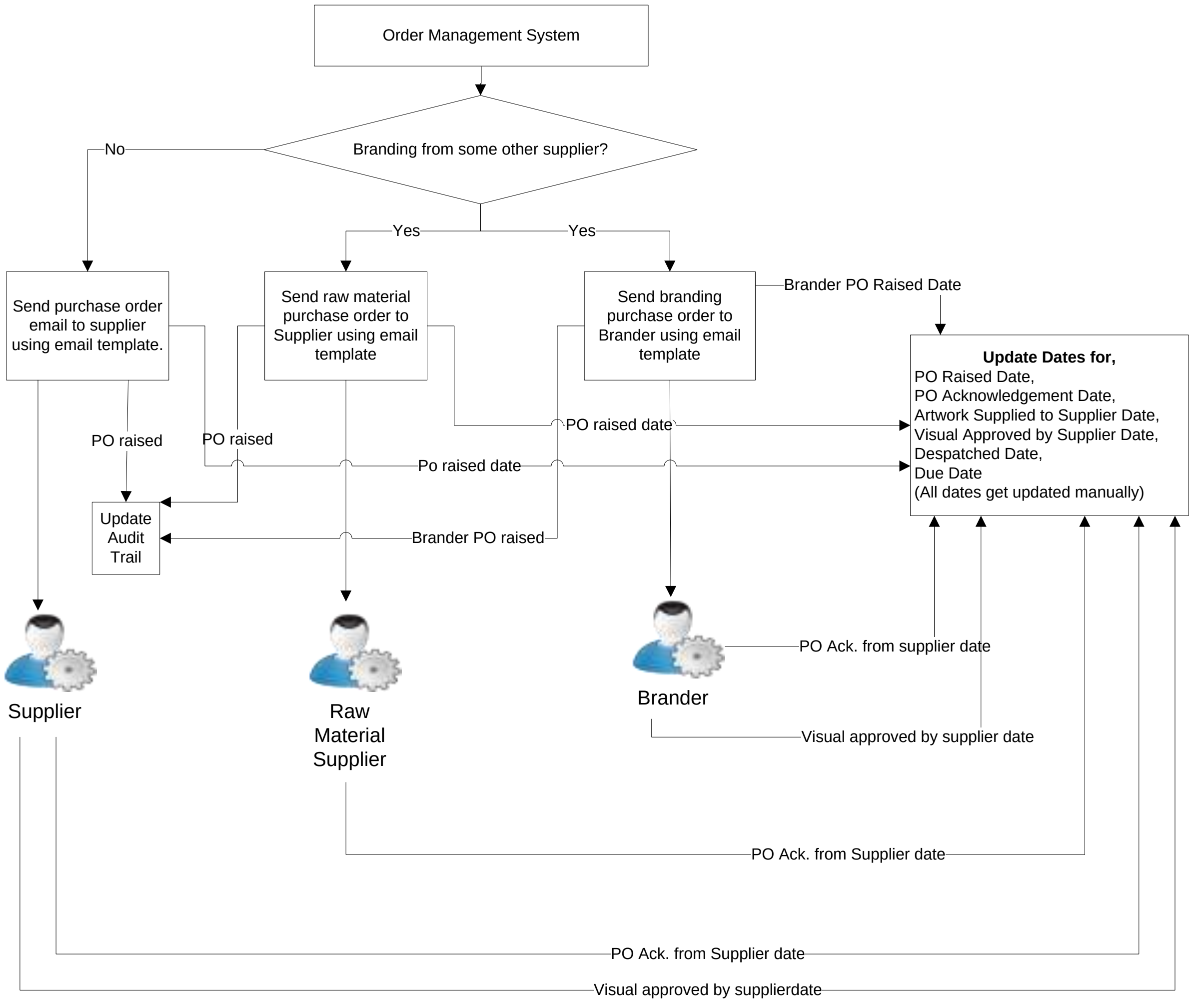
1 of 1 30/04/2014 10:51

Sales order once created can be editable till invoice has not been sent customer.

4.0. Purchase Order:

System does not create any purchase order document as such, rather system only allows to send purchase order email to supplier from sales order page using email template. If customer requires branding from some other vendor then system has provision to send different purchase order, one for supplier (for raw material) and another for brander (for branding). Otherwise only one purchase order raised using email template.

Audit trail entries are made as shown in below flow diagram. System automatically updates dates of documents send out from the system. Whereas all incoming documents dates gets updated manually by user.



5.0. Dashboards:

System has different dashboards defined for different user roles. Below are the list dashboards and features available under each of them.

Dynamic company monthly targets - System has an area on the top left of the header where it shows monthly targets as below,

Monthly overall sales target
Sales to date (within the month)
Sales still required
Percentage of target achieved
Target margin
Margin achieved
Percentage of target margin achieved

5.1. Company President/CEO Dashboard

This dashboard is for president/CEO of company. It has following features,

5.1.1. Open Orders

This subsection shows list of all open orders.

Order No.	Date	Customer	Status	
SO1001	11/06/2014	Cougar Products UK Limited	Order Shipped.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Order in production.	HermanM
SO1003	11/06/2014	G Brooks & Co Ltd	Artwork prepared.	PatelM
SO1004	12/06/2014	G Brooks & Co Ltd	Visual sent to customer.	PatelM

Order number is a link that redirects to order detail page.

5.1.2. Open Enquiries

This subsection shows list of all open enquiries.

Enquiry No.	Date	Customer	Status	User ID
CG-1013	12/06/2014	Cougar Products UK Limited		HermanM
CG-1030	12/06/2014	Cougar Products UK Limited		HermanM
CG-1040	12/06/2014	G Brooks & Co Ltd		PatelM

In order to take any action on listed enquiry user has to click enquiry no. which redirects to enquiry details page.

5.1.3. Unallocated Enquiries

This subsection shows list of all unallocated enquiries.

Enquiry No.	Date	Customer	Status
CG-1013	12/06/2014	Cougar Products UK Limited	
CG-1030	12/06/2014	Cougar Products UK Limited	
CG-1040	12/06/2014	G Brooks & Co Ltd	

Enquiry no. link opens enquiry detail page where users can assigned enquiry to themselves and start working on enquiry.

5.1.4. My Follow up – Calendar

This subsection shows list of all follow-ups need to be taken by log in user.

Enquiry No.	Customer	Follow-Up date	Assigned by
CG-1013	12/06/2014	Cougar Products UK Limited	
CG-1030	12/06/2014	Cougar Products UK Limited	
CG-1040	12/06/2014	G Brooks & Co Ltd	

Enquiry no. link opens enquiry detail page where users can start working on enquiry.

5.1.5. Company Calendar

This area displays current month calendar along with all follow-ups for all users.
System also has feature to see next and previous month's follow-ups in order to see what task has been done in last months and what are pending for next month respectively.

5.1.6. Report Shortcuts

Links to all reports available in the system.

5.2. Sales and Marketing Dashboard

5.2.1. Open Enquiries

This displays list of all open enquiries assigned to log in user.

Enquiry No.	Date	Customer	Status

CG-1013	12/06/2014	Cougar Products UK Limited	Initial follow-ups.
CG-1030	12/06/2014	Cougar Products UK Limited	
CG-1040	12/06/2014	G Brooks & Co Ltd	

In order to take any action on listed enquiry user has to click enquiry no. which redirects to enquiry details page.

5.2.2. Open Orders

This displays list of all open order assigned to log in user.

Order No.	Date	Customer	Status
SO1001	11/06/2014	Cougar Products UK Limited	Order Shipped.
SO1002	11/06/2014	Cougar Products UK Limited	Order in production.
SO1003	11/06/2014	G Brooks & Co Ltd	Artwork prepared.
SO1004	12/06/2014	G Brooks & Co Ltd	Visual sent to customer.

Order number is a link that redirects to order detail page.

5.2.3. Unallocated Enquiries

This subsection shows list of all unallocated enquiries.

Enquiry No.	Date	Customer	Status
CG-1013	12/06/2014	Cougar Products UK Limited	
CG-1030	12/06/2014	Cougar Products UK Limited	
CG-1040	12/06/2014	G Brooks & Co Ltd	

Enquiry no. link opens enquiry detail page where users can allocate enquiry to themselves and start working on enquiry.

5.2.4. Supplier Sample for Approval

This is list of all orders for which supplier invoice for sample request need to be approved by sales user.

Enquiry No.	Date	Customer	Status
CG-1013	12/06/2014	Cougar Products UK Limited	

CG-1030	12/06/2014	Cougar Products UK Limited	
CG-1040	12/06/2014	G Brooks & Co Ltd	

Enquiry no. link opens enquiry detail page where sales person can approve sample request invoice sent by supplier.

5.2.5. My Calendar

This shows current month calendar along with list of all follow-ups need to be taken by log in user. System also has feature to see next and previous month's follow-ups in order to see what task has been done in last months and what are pending for next month respectively.

5.3. Order Manager Dashboard

5.3.1. Open Orders

This displays list of all open orders for all sales person reporting to log in user.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Order Shipped.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Order in production.	HermanM
SO1003	11/06/2014	G Brooks & Co Ltd	Artwork prepared.	PatelM
SO1004	12/06/2014	G Brooks & Co Ltd	Visual sent to customer.	PatelM

On click action on order no. opens order details page.

5.3.2. My Follow up – Calendar

This shows current month calendar along with list of all follow-ups need to be taken by log in user. System also has feature to see next and previous month's follow-ups in order to see what task has been done in last months and what are pending for next month respectively.

5.3.3. Order Acknowledgment Not sent

Displays all order for which order acknowledgement has not sent to customer.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Sample approved by customer.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Order Placed.	HermanM

SO1003	11/06/2014	G Brooks & Co Ltd	Quote sent to customer.	PatelM

These are the list of orders for which acknowledgement not sent to customer date.

5.3.4. Artwork Not Received

Displays all order for which artwork has not received from customer.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Sample approved by customer.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Awaiting artwork from customer.	HermanM

5.3.5. Artwork Not Created

Displays all order for which artwork has not prepared.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Awaiting artwork creation.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Awaiting artwork creation.	HermanM

5.3.6. Visual Not Sent

Displays all order for which visual has not received from customer.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Visual prepared.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Visual prepared.	HermanM

5.3.7. Visual Not Approved

Displays all order for which visual has not approved by customer.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products	Visual sent for	HermanM

		UK Limited	approval.	
SO1002	11/06/2014	Cougar Products UK Limited	Visual sent for approval.	HermanM

5.4. Purchase Dashboard

5.4.1. Artwork Not Supplied

Displays all orders for which artworks have not provided to supplier.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Purchase order sent to supplier.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Purchase order sent to supplier.	HermanM

5.4.2. Visual Not Approved

Displays all orders for which artworks have not provided to supplier.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Visual sent for approval.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Visual sent for approval.	HermanM

5.4.3. My Follow-ups – Calendar

This subsection shows list of all follow-ups need to be taken by log in user.

This shows current month calendar along with list of all follow-ups need to be taken by log in user. System also has feature to see next and previous month's follow-ups in order to see what task has been done in last months and what are pending for next month respectively.

5.5. Account Dashboard

5.5.1. Customer Sample Request Invoice to be sent

This section displays all enquiries waiting to send Sample request invoice to customer.

Enquiry No.	Date	Customer	Status
CG-1013	12/06/2014	Cougar Products UK	

		Limited	
CG-1030	12/06/2014	Cougar Products UK Limited	
CG-1040	12/06/2014	G Brooks & Co Ltd	

Enquiry no. link opens enquiry page and user can have an idea about sample request amount to be chare in invoice.

5.5.2. Approved Supplier Sample Request Invoices

List of all enquiries for which supplier sample request invoice has been approved by sales person so that account user can make payment accordingly.

Enquiry No.	Date	Customer	Status
CG-1013	12/06/2014	Cougar Products UK Limited	
CG-1030	12/06/2014	Cougar Products UK Limited	
CG-1040	12/06/2014	G Brooks & Co Ltd	

5.5.3. Order to be Invoiced:

List of all orders to be invoiced to customer.

Order No.	Date	Customer	Status	User ID
SO1001	11/06/2014	Cougar Products UK Limited	Visual sent for approval.	HermanM
SO1002	11/06/2014	Cougar Products UK Limited	Visual sent for approval.	HermanM

5.6. System Administrator Dashboard

5.6.1. My Follow-ups – Calendar

This shows current month calendar along with list of all follow-ups need to be taken by log in user. System also has feature to see next and previous month's follow-ups in order to see what task has been done in last months and what are pending for next month respectively.

5.6.2. Shortcuts

This area has all links to setup master data and initial company setup.

6.0. Customer Login

Each customer has been provided with login credential i.e. username and password. User name is by default customer's email ID, and password is system generated password that is stored in customer card in encrypted form. Customer can log into the system by providing valid credential. Customer page has following link,

1. Forgot password

Customer can retrieve password by providing valid email address. System verifies customer email address and email password in response.

2. Order status list

This list shows all orders for log in customer along with order's current status.

Order No.	Date	Status
SO1001	11/06/2014	Order shipped.
SO1002	13/06/2014	Visual approved.
SO1003	15/062014	Artwork prepared.

Order no. is link that redirect to order detail page.

7.0. Master Data Manipulation:

7.1. Control Panel

System has two different control panels one is for Advantage and another one is for Distributor. System has multiple databases one is for Advantage and other one is for distributor. Each distributor system has its own database and which gets controlled by main Advantage database. Hence system has two control panels and their features are as explained below.

7.1.1. Advantage's Control Panel:

This is mainly design for advantage user to manage and control multiple distributors systems at the same time manages its own user and there access rights. This control panel is common for all Advantage's distributor. Here Advantage user can manage multiple distributors and also create & manage multiple distributors' systems. It has following features,

7.1.1.1. Manage Advantage Group Role Setup and User Setup

7.1.1.1.1. Advantage's User Role:

User Role Master Page has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
User Role ID	Integer			Identity Column. Backend field.

User Role	Integer			Unique role name.
Description	Text			Role description.

This page has self-editing grid with following options:

- Create New Role: This action add new row at end of grid and allow user to create new role.
- Edit Role: This action is row specific action and allows selected row to edit.
- Delete Role: This action is also row specific and allows selected row to delete with proper warning before deletion of record.

7.1.1.1.2. Advantage's User Master:

User master page has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
User ID	Integer			Identity Column. Backend field.
First Name	Text			First name.
Last Name	Integer			Last name.
Email Address	Text	Validate email address	Please provide valid email address.	Email address
Role	Integer			Check box list to select role from list of role defined in the system. User can have multiple roles.
Active	Date time			By default true.

User master page has self-editing grid with following actions:

- Create New User: This action add new row at end of grid and allow user to create new user.
- Edit Role: This action is row specific action and allows selected row to edit.

7.1.1.2. Create and update distributor's information

This section keeps information about all Advantage Group's distributor.

Distributor List Page:

Distributor Name	Distributor Contact	Access to Advantage Suppliers	Access to Advantage Products	No. of user permitted.
Distributor 1	Peter	Yes	Yes	6
Distributor 2	John	Yes	Yes	5
Distributor 3	Ruby	No	No	4

Distributor name has link which serve purpose of view and edit distributor information. It redirects user to distributor card page.

Create Distributor (Button): On click action on this button will open distributor card page to create new distributor. Distributor card page has following fields,

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Distributor ID	Integer			Identity Column. Backend field.
Distributor Company Name	Text			Distributor company name.
Distributor Contact	Text			Distributor's contact.
Address 1				Distributor's Address 1
Address 2				Distributor's Address 2
Town				Distributor's Town
County				Distributor's County
Country				Distributor's Country
Post Code				Distributor's Post Code
Email Address				Distributor's email address
Contact No.				Distributor's contact no.
Mobile No.				Distributor's mobile no.
Can Access Advantage's Item	Boolean			Decides whether distributor can access Advantage's item data or not. By default false.
Can Access Advantage's Supplier	Boolean			Decides whether distributor can access Advantage's supplier data or not. By default false.
No. users allowed	Integer			No. of users distributor can create to access Order Management System.

7.1.1.3. Calendar:

This section allows user to define nonworking days (holidays) for company for current year. System automatically takes care of weekly holidays (Saturdays and Sundays) but user has to define holiday list for current year manually. It has setup as shown below,

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Date	Date			Holiday date.
Holiday Description	Text			Holiday description.

This set up is applicable to all other distributor's system. Any change to this setup will update all distributor's nonworking days setups and this is not vice versa. On distributor's end distributor by default has Advantage's nonworking days setup and it is editable as per distributors need.

7.1.2. Distributor's Control Panel:

This area is especially for distributor administrator to manage and control application and users. It has following features,

7.1.2.1. Manage Company Level Setup:

This section is to manage company level setup. Editable grid to manage single record.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
ID	Integer			Identity field.
Initial follow -up days	Integer			Defines no. of days to take initial follow-up after enquiry quote has been sent to customer.
Payment reminder days	Integer			Defines no. of days to wait to follow payment reminder.
Company Logo	Text			Path of logo file to be displayed on system pages.
Sample Request Follow-up days	Integer			Defines no. of days to wait to follow-up sample request.
Repeat order Reminder	Integer			This field decides after how many no. of days user has been reminded for repeat order.
Delivery of goods follow-ups days	Integer			Decides no. of days to wait to follow-up delivery of goods.

7.1.2.2. Manage user setup and user access rights:

This section allows Super Admin to manage users, user role, user role wise module setup i.e. which module is accessible to which user role.

7.1.2.2.1. User Role:

User Role Master Page has following fields:

Attribute	Data	Validation	Validation	Comments/Description /Business

	Type		Message	Rules
User Role ID	Integer			Identity Column. Backend field.
User Role	Integer			Unique role name.
Description	Text			Role description.

This page has self-editing grid with following options:

- Create New Role: This action add new row at end of grid and allow user to create new role.
- Edit Role: This action is row specific action and allows selected row to edit.
- Delete Role: This action is also row specific and allows selected row to delete with proper warning before deletion of record.

7.1.2.2.2. User Master:

User master page has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
User ID	Integer			Identity Column. Backend field.
First Name	Text			First name.
Last Name	Integer			Last name.
Email Address	Text	Validate email address	Please provide valid email address.	Email address
Role	Text			Check box list to select role from list of role defined in the system. User can have multiple roles.
Active	Date time			By default true.

User master page has self-editing grid with following actions:

- Create New User: This action add new row at end of grid and allow user to create new user.
- Edit Role: This action is row specific action and allows selected row to edit.
- Delete Role: This action is also row specific and allows selected row to delete with proper warning before deletion of record.

7.1.2.3. Create and manage customer information:

This section allows user to create new customer entry. And also allows to manage existing customer records i.e. update, activate/deactivate existing customer. System has provision to import/ export multiple customer records using excel.

Customer card page has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Customer ID	Integer			Identity Column. Backend field.
Customer No.	Text			This is customer no. from SAGE system. This field is not mandatory for enquiry but to proceed further to place an order it is mandatory.
Customer First Name	Text	Mandatory field	Provide customer name.	Customer first name.
Customer Last name	Text			Customer last name.
Contact	Text			Drop down with list of contact from contact master.
Address 1				Address 1. By default Address1 of selected contact and can be overridden.
Address 2				Address 2 By default Address2 of selected contact and can be overridden.
Town				Town By default Town of selected contact and can be overridden.
County				County By default county of selected contact and can be overridden.
Country				By default country of selected contact and can be overridden.
Post Code				Post Code By default post code of selected contact and can be overridden.
Fax No.	Text			Invoice to Fax No. By default fax no. of selected contact and can be overridden.
Email address	Text	Validate email address	Provide proper email address.	Email address. By default email address of selected contact and can be overridden.
Password	Text			This is auto generated field and saves password in encrypted form.
Invoice to Address 1	Text			Invoice to Address 1

Invoice to Address 2	Text			Invoice to Address 2
Invoice to Town	Text			Invoice to Town
Invoice to County	Text			Invoice to County
Invoice to Country	Text			Invoice to Country
Invoice to Post Code	Text	Mandatory field	Provide invoice to Post code.	Invoice to Post Code
Invoice to Contact	Text			Invoice to Contact
Invoice to Fax No.	Text			Invoice to Fax No. By default email address of selected contact and can be overridden.
Email address	Text	Validate email address	Provide proper email address.	Email address. By default email address of selected contact and can be overridden.
Deliver to Address 1	Text			Deliver to Address 1
Deliver to Address 2	Text			Deliver to Address 2
Deliver to Town	Text			Deliver to town
Deliver to County	Text			Deliver to County
Deliver to Country	Text			Deliver to Country
Deliver to Post Code	Text	Mandatory field	Provide deliver to Post code.	Deliver to Post Code
Deliver to Contact	Text			Deliver to Contact
Deliver to Fax No.	Text			Deliver to Fax No.
Credit Limit	Decimal			Credit limit amount decides credit limit for customer.
Payment Terms	Text			Drop down with values, Pro-forma and Account. If no credit limit then by default Pro-forma.
Account	Text			Customer Account no. in case

No.				payment terms is Account.

Send login credential to customer (Button)
This button action sends login details to customer in email.

Customer may have more than one deliver to address. System manages this by storing multiple deliver to address against customer. Deliver to address page has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Customer ID	Integer	Mandatory field	Provide valid customer.	Predictive search field with drop down to select customer from list.
Deliver To No.	TEXT	Mandatory field. Already exists or not.	Provide deliver to no. Provided deliver to no. already exists in the system.	Unique identification no.
Deliver to Address 1	Text			Deliver to Address 1
Deliver to Address 2	Text			Deliver to Address 2
Deliver to Town	Text			Deliver to Town
Deliver to County	Text			Deliver to County
Deliver to Country	Text			Deliver to Country
Deliver to Post Code	Text	Mandatory field	Provide deliver to Post code.	Deliver to Post Code
Deliver to Contact	Text			Deliver to Contact
Deliver to Fax No.	Text			Deliver to Fax No.

Customer may also have multiple contacts attached. Out of these multiple contacts one contact is primary and that contact details will be considered as primary contact detail in further communications. Contact Card has following fields,

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Customer ID	Integer	Mandatory field	Provide valid customer.	Predictive search field with drop down to select customer from list.
Contact ID	Integer			Identity column. Auto incremented integer number. Back end field.
Contact Name	Text			Name of the contact.
Address 1	Text			Contact's Address 1
Address 2	Text			Contact's Address 2
City	Text			Contact's City
County	Text			Contact's County
Country	Text			Contact's Country
Post Code	Text	Mandatory field	Provide deliver to Post code.	Contact's Post Code
Phone No.	Text			Phone number of contact.
Mobile No.	Text			Mobile no. of contact.
Email ID	Text	Mandatory field	Please provide valid email Id.	Contact's Email Id.
Fax No.	Text			Contact's Fax No.

Customer card has provision to import data in excel format.

7.1.2.4. Manage Products and Suppliers:

This section is available for distributors to manage their own products and suppliers. System has ability to import/export supplier and product list from excel.

7.1.2.4.1. Product Categories:

This setup allows user to define categories for products.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Category ID	Integer			Identity field.

Category Name	Text			Category name.
Category Description	Text			Category description.

This interface is an editable grid which allows user to add, edit, and delete categories. User can also import categories from excel.

7.1.2.4.2. Supplier Master:

Manages supplier data.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Supplier ID	Integer			Identity field.
Supplier Name	Text	Mandatory field.		Supplier name.
Address 1	Text			Supplier address.
Address 2	Text			Supplier address.
Town	Text			Supplier town.
County	Text			Supplier county.
Country	Text			Supplier country.
Post code	Text			Supplier post code.
Contact	Text			Supplier contact.
Email ID	Text			Supplier email ID.
Phone No.	Text			Supplier phone no.
Mobile No.	Text			Supplier mobile no.
Turnaround time	Integer			Supplier turnaround time in terms of days.

Supplier Contact Master:

Supplier has more than one contact each one is for Sales, Sample and Artwork.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Contact ID	Integer			Identity field
Supplier	Integer	Mandatory	Please provide	Supplier Id from supplier

ID			supplier ID.	master
Name	Text			Contact name.
Address	Text			Contact address.
Email ID	Text			Contact email id.
Phone Number	Text			Contact phone.
Sales Contact	Boolean			Decides whether sales contact.
Sample Contact	Boolean			Decides whether sample contact.
Artwork Contact	Boolean			Decides whether artwork contact.

7.1.2.4.3. Product Master:

This section allows user to define products.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Product ID	Text	Mandatory field. Duplicate product ID.	Please provide product ID. Product ID already exists.	Unique product id. Mandatory.
Product Name	Text	Mandatory field.	Please provide product name.	Product name.
Product description	Text			Product description.
Product Category	Text			
Supplier ID	Integer	Mandatory field.	Please provide supplier ID.	From supplier master.
Image Path	Text			Item image
Supplier Item No.	Text			Supplier Item number.

Advantage Item No.	Text			Advantage item number.
Item dimension	Text			Item dimension
Item specification	Text			Item specification
Item colour	Text			Item colour.

7.1.2.4.4. Product cost and pricing setup:

System allows user to define cost, pricing and different charges for product based quantity.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Id	*Integer*			Identity field.
Product ID	Text	Mandatory field.	Please provide product ID.	Dropdown to select product from product master.
Quantity	Decimal	Mandatory field.	Please provide product quantity.	Product Quantity.
Cost	Decimal			Product cost.
Print Cost	Decimal			Print cost.
Origination Cost	Decimal			Origination Cost.
Carriage Cost	Decimal			Carriage Cost.
Selling Price	Decimal			Selling Price.
Origination price	Decimal			Origination price.
Carriage price	Decimal			Carriage price

7.1.2.5. Price Mark-up Setup:

User can setup different mark-up prices for different spend values. User has to define matrix for price mark-up and adjust mark-up percentage for matrix. Price mark-up setup page will look like the below:

7.1.2.5.1. Create New Matrix

User can create one or more Price matrix and can setup cost and mark-up percentage.

Matrix Name	Description
Standard UK	
Discounted mark-up	

For each mark-up matrix defined above user has to setup cost and mark-up percentage as below:

Cost	Mark-up %	
0-1000	1.6	Edit/Delete
1000-1999	1.55	Edit/Delete
2000-2999	1.5	Edit/Delete
3000-3999	1.45	Edit/Delete
4000-4999	1.4	Edit/Delete
5000-5999	1.3	Edit/Delete

7.1.2.6. Module:

System will have different modules like, Enquiry, Order and Purchase Order etc. Module table has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Module ID	Integer			Identity Column. Backend field.
Module Name	Text			Module name.
Description	Text			Module description.

Module page has self-editing grid with following actions:

- Create New Module: This action add new row at end of grid and allow user to create module.
- Edit Role: This action is row specific action and allows selected row to edit.
- Delete Role: This action is also row specific and allows selected row to delete with proper warning before deletion of record.

7.1.2.6.1. Module Role Setup:

Module is accessible to specific role as per defined in module role setup. It has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
User Role ID	Integer			Identity Column. Backend field.
Module ID	Integer			Module ID.
Description	Text			Description.

- Module Role Setup page has self-editing grid with following actions,
- Crete New: This action add new row at end of grid and allow user to setup role to module.
- Edit Role: This action is row specific action and allows selected row to edit.
- Delete Role: This action is also row specific and allows selected row to delete with proper warning before deletion of record.

7.1.2.7. Email Template Management

This section allows user to manage email template and system template.

The System has feature to setup different email template and associate it with different modules. As per association only associated email templates are shown /available on respective modules.

7.1.2.7.1. Email Template

Email template page has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Email Template ID	Integer			Backend field. Identity column.
To	Text	Mandatory field. (No post back)	Please provide recipient id.	Recipient ID. Supplier's User email ID
CC	Text			
BCC	Text			
Subject	Text	Mandatory field. (No post back)	Please provide email subject.	By default from email template setup table.
Attached Documents	Text			User can attach one or more documents in email and all these documents get stored at predefined

				location as per email attachment document path setup (refer section data manipulation).
Document Text	Text			This field gets filled automatically as per email setup defined (refer master data manipulation section) and as per data from enquiry page. User can modify email body before sending email.
Send as attachment	Boolean			If true then send document text as file attachment else as body text.
Text Message	Text			Text message of email body
Module	Text			Drop down with values, Enquiry and Order. This decides whether email template setup is for Enquiry or Order. And accordingly it will be available on enquiry and order page.
For Customer	Boolean			Decides whether email setup is for customer or not.
For Supplier	Boolean			Decides whether email setup is for supplier or not.
Standard Email	Boolean			Decides email setup is standard or created by distributor.

Email template list page will show all email templates defined in the system and also have following actions:

- Create new Email: Opens new email template page with above mentioned field and allows user to setup new email template.
- View/Edit Email Template: This is row specific action allow user to view/edit selected email template.
- Delete Email template: This is also row specific action allows user to delete selected email template.
- User cannot delete or modify standard email setup.

Email template page has two options:

- Send as email now: This action sends an email to selected email addresses. And also update the diary notes for enquiry and audit trail about action taken. (For audit trail refer section Audit Trail management)
- Save as file attached to enquiry: This action saves document text as file and attaches it to enquiry. His also indicate that email has not been sent rather saved with enquiry or order.

Email template page is common for all emails going out from the system. From enquiry page and order page user can send multiple emails at different stages of the enquiry processing.
All the emails are triggered from the system by manual action. System keeps track of each email going out of the system against enquiry and update the audit trail accordingly. At the same time system keeps track of each and every email attachment documents.

7.1.2.7.2. Module-Email Template:

This page defines association of email template for respective module. Module-Email template page has following fields,

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
ID	Integer			Backend field. Identity column.
Email Template ID	Integer			Dropdown list to select email template from list.
Module ID	Integer			Dropdown list to select module from list.

7.1.2.8. System Template Management

System level template helps user to manage Custom CSS, Login Page, Page Header, and Page Footer.

7.1.2.9. Miscellaneous:

This section allows user to manage monthly user targets, margins, Calendar, Branding Options, Suppler categories, Enquiry sources.

7.1.2.9.1. Targets

User can define monthly targets and profit margins for sales person. Manage targets page looks like the following:

Month	Target	Target Margin	
2014-01	**150000.00**	**0.38**	Edit/Delete
2014-02	**150000.00**	**0.38**	Edit/Delete
2014-03	**25000.00**	**0.40**	Edit/Delete
2014-04	**16000.00**	**0.40**	Edit/Delete
2014-05	**33000.00**	**0.40**	Edit/Delete

The following actions are available here:

- Create New (Button): This action creates new row in grid and allows user to create new target margin for month.
- Edit/Delete (Button): These are row specific actions and allows user to edit or delete selected target line.

Targets can be manually set by distributor for first year and there is option to auto fill after first year with +5% and this can be editable.

7.1.2.9.2. Calendar:

This section by default show nonworking days (holidays) for current year. It has setup as shown below,

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
Date	Date			Holiday date.
Holiday Description	Text			Holiday description.

Distributor can change this as per distributor's need.

7.1.2.9.3. Branding Options

Defines branding option to select on sales order page. Branding option page has following fields:

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
ID	Integer			Identity field. Backend field.
Description	Text			Branding description.
Sequence	Integer			Unique number which defines order of display for branding options in drop down on enquiry page.
Mark-up Quantity	Integer			Mark-up Quantity.
Active	Boolean			Only active branding options are considered.

This page is self-editing grid with Create new button on top of the grid and edit/delete button on row level to edit/delete record.

- Create New (Button): Creates new entry for branding options.
- Edit/Delete (Button): Edit/Delete selected branding options.

7.1.2.9.4. Enquiry Sources

This section defines enquiry sources. Allows user to add, edit and delete enquiry sources. Sources defined here, are appear as enquiry sources on enquiry page.

Attribute	Data Type	Validation	Validation Message	Comments/Description /Business Rules
ID	Integer			Identity field. Backend field.
Name	Text			Source Name
Sequence	Integer			Unique number which defines order of display for enquiry sources in drop down on enquiry page.
Active	Boolean			Only active sources are considered.

This page is self-editing grid with Create new button on top of the grid and edit/delete button on row level to edit/delete record.

- Create New (Button): Creates new entry for enquiry source.
- Edit/Delete (Button): Edit/Delete selected enquiry source.

8.0. Reports

System is able to generate reports those are useful for Administrator and sales person to analysis the business. This section has set of reports as described below.

8.1. Reports Home Page:

This page shows set of reports that system can generate. All reports are categorized as shown below. Each report has separate link to view it.

1) **General:**
   - Sales Activity Report
2) **Enquiries:**
   - Supplier Analysis
   - Product Analysis
   - User Analysis
   - Proactive Enquiries
3) **Orders:**
   - Monthly Order Stats
   - Top Suppliers
   - Product Analysis
   - User Analysis
4) **Financials:**

- Cash flow Summary
- Sales & Cost of Sales

8.1.1. Sales Activity Report:

Sales activity report shows total of all enquiries and orders placed in given period. This is parameterized report so that user can extract activity report for a day or for selected period as per parameters provided.

Parameters:

Start Date	(Date selection control)	**End Date**	(Date selection control)

View (Button): To view report based on the parameter values provided.

Based on the parameter value supplied system shows sales activity report for given period.

Summary:

Number of Enquiries	(No. of enquiries received from all sales person in given period.)
Estimated Spend	(No. of estimated amounts spend in given period.)
Average Spend	(No. of average amount spend in given monthly period.)
Number of Orders	(No. of orders processed by all sales person in given period.)
Order Value	(Total order value in given period.)
Order Profit	(Total profit amount in given month period.)
Order Margin	(Margin percentage on total order value in given period.)

Details:

Day	Total			Enquiry Value	Order Value	Order Margin
	No. of Enquiries	No. of Quotes	No. of Orders			
5th December 08 (Fri)	3	2	3	£1,525	£1,904	26.5%
4th December 08 (Thu)	3	4	0	£335	£0	-
3rd December 08 (Wed)	7	4	4	£1,010	£792	52.6%

Print (Button): To print report.

8.1.2. Supplier Analysis Report:

This report shows top 10 suppliers by no. of enquires made and no. of order made.

Top 10 suppliers by enquiries

Report has following parameters,

Parameters:

Start Date	Date selection control.
End Date	Date selection control.
Supplier	Supplier specific report. Drop down with list of supplier.
Show	Drop down list with values, Top 10(Default), All

View (Button): To view report based on the parameter values provided.

Report Format:

Supplier	**Number of Enquiries Made** (No. of enquired items)	**Percentage of Total** (Percentage of total enquiries made by supplier within selected period)
Cougar Products UK Limited	16	70%
Replay Promotions	6	26%
Coronation Promotions	1	4%

Print (Button): To print report.

Top 10 suppliers by orders

Report has following parameters,

Parameters:

Start Date	Date selection control.
End Date	Date selection control.
Supplier	Supplier specific report. Drop down with list of supplier.
Show	Drop down list with values, Top 10(Default), All

View (Button): To view report based on the parameter values provided.

Report Format:

Supplier	Number of Order Made (No. of ordered items)	Percentage of Total (Percentage of total orders made by supplier within selected period)
Cougar Products UK Limited	16	70%
Replay Promotions	6	26%
Coronation Promotions	1	4%

Print (Button): To print report.

8.1.3. Product Analysis Report for Enquiries:

This report shows top 10 product categories by number of enquiries made within selected period. Each row shows sum of all enquiry items for category.

Parameters:

Start Date	Date selection control.
End Date	Date selection control.
Category	Category specific report. Drop down with list of categories.
Show	Drop down list with values, Top 10(Default), All

View (Button): To view report based on the parameter values provided.

Report Format:

Product Category	Number of Enquiries Made (No. of enquired items)	Percentage of Total
Ballpens	909	57%
Keyrings	468	30%
Rollerballs	206	13%

Print (Button): To print report.

8.1.4. User Analysis Report for Enquiries:

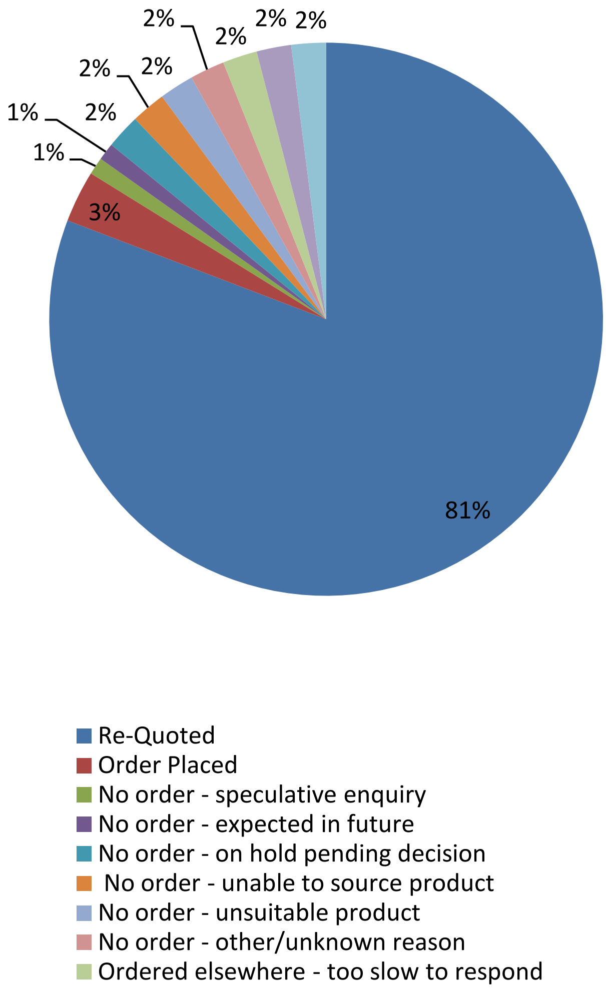
These reports are shown as pie chart for enquiry analysis. Pie Charts show percentages of the closing criteria/status for each enquiry. System allows user to set enquiry closing criteria (Refer master data manipulation section). If enquiry has not converted to order, system has an option for user to close enquiry by selecting one of the closing criteria. Below is the list of probable enquiry closing criteria/statuses,

- Re-Quoted
- Order placed
- No order - speculative enquiry
- No order - expected in future
- No order - on hold pending decision
- No order - unable to source product
- No order - unsuitable product
- No order - other/unknown reason
- Ordered elsewhere - too slow to respond
- Ordered elsewhere - due to cost
- Ordered elsewhere - other/unknown reason

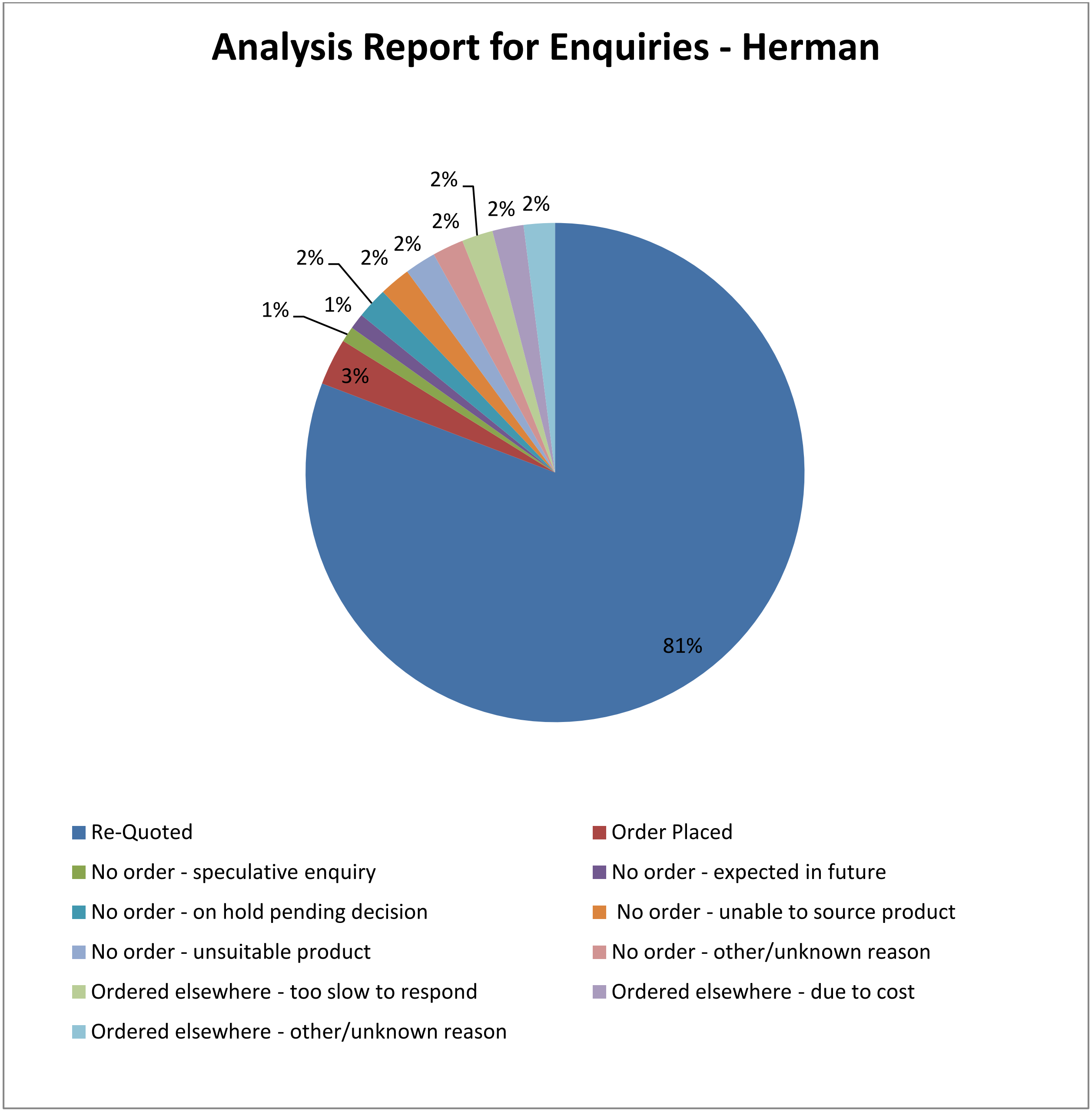
The page has two sections:

- **Distributor Company:** Displays pie chart showing enquiry analysis for the distributor company.

User Analysis Report for Enquiries



- **Sales Users:** Displays separate pie charts showing enquiry analysis for each sales user.



8.1.5. Proactive Enquiries Report:

This report basically used to follow ups dormant clients/contacts.

Parameters:

User	Drop down with list of all users. By default All user option selected.
Spend limit	Allows user to set a Spend Limit which creates a report for all previous orders/enquiries below spend limit.
Period	Drop down list with values,

	3 months (Default), 6 months, 9 months, 12 months.

View (Button): Shows report based on the parameters provided.

Remove (Button):
As shown below first column of the report select column which has check box against each contact. This is an interactive report where user can select contacts and remove them from list. Remove action temporarily removes select contacts from the list.

Report Format:

	User	Customer Contact	Latest Contact	Largest Value (Spent amount)
	APRIL 14:			
(Checkbox)	Patelm	Sam.Brian@saint-gobain.com	15-05-08	2500.00
	MAY 14:			
(Checkbox)	patelm	mark.ingleby@feridax.com	04-06-08	7000.00
(Checkbox)	patelm	Richard@thelighthouseagency.com	04-06-08	2200.00

Print (Button): To print report.

8.1.6. Monthly Order Stats Report:

This report shows list of sales orders, purchase orders, no. of order, and margin.

Parameters:

Month	Drop down list with months. (By default current month)
Year	Drop down list with years. (By default current year)

Next Month (Button): To select next month.
Previous Month (Button): To select previous month.

View (Button): Shows report based on the parameters provided.

Report Format:

Power Weave Software Services LLC
Oakfield, Little Somerford
Wiltshire, SN15 5JX
Phone: +44 207 096 0237

Sales Orders	Purchase Order	No. of Orders	Margin

Print (Button): To print report.

8.1.7. Top Suppliers Report:

This report shows top 10 suppliers descending of total Order Price.

Parameters:

Start Date	Date selection control.
End Date	Date selection control.
Supplier	Supplier specific report. Drop down with list of supplier.
Show	Drop down list with values, Top 10(Default), All

Next month period (Button): To select next month period.
Previous month period (Button): To select previous month period.

View (Button): Shows report based on the parameters provided.

Report Format:

Supplier	Orders	Excluding Carriage	Average (Excluding Carriage / Orders)	Carriage	Total (Excluding Carriage + Carriage)
Cougar Products UK Limited	21	5,512.00	262.50	73.39	5,585.89
Prodir Limited	2	1,145.00	572.50	30.00	1,175.00
Silkscreen & Tampo	9	657.75	73.08	30.00	687.75
TOTAL		**7,314.75**		**133.39**	**7,448.64**

Print (Button): To print report.

8.1.8. Product Analysis Report for orders:

This report shows top 10 product categories by number of orders made within selected period. Each row shows sum of all order items for category.

Parameters:

Start Date	Date selection control.
End Date	Date selection control.
Category	Category specific report. Drop down with list of categories.
Show	Drop down list with values, Top 10(Default), All

View (Button): To view report based on the parameter values provided.

Report Format:

Product Category	Number of Orders Made (No. of ordered items)	Percentage of Total
Ballpens	909	57%
Keyrings	468	30%
Rollerballs	206	13%

Print (Button): To print report.

8.1.9. User Analysis Report for Sales/Orders:

This pie chart report shows each sales users sales as percentage of overall sales.

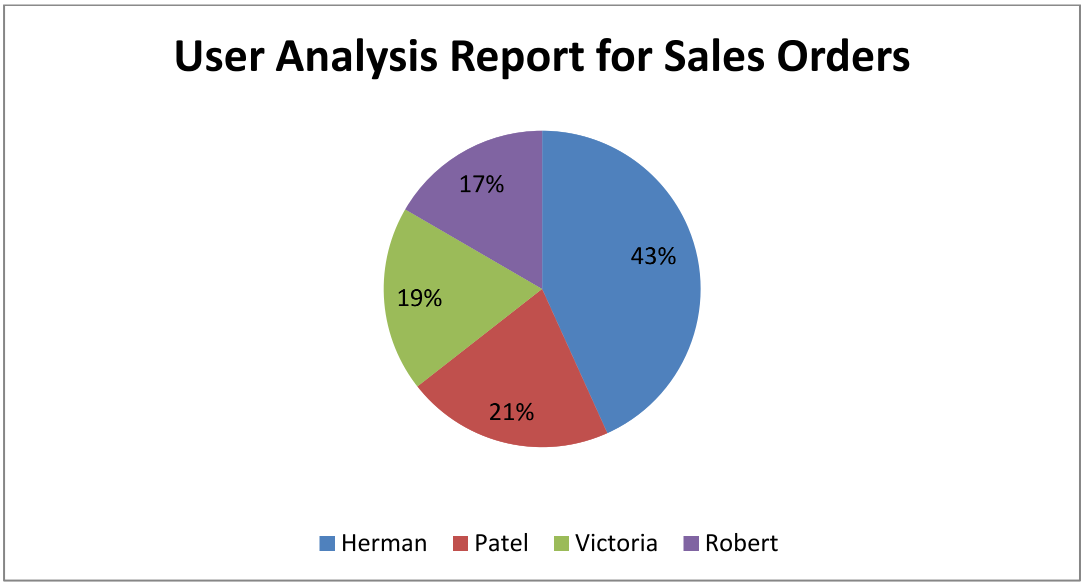
User analysis - Sales – as for enquiries – to show value (net of tax origination & carriage) shown in Pie chart, each segment to be different sales users in different cols to graphically show user sales against other users and as percentage of overall sales. Also in table form to show each user / sales / number of orders, each order value & margin / total monthly orders and margins achieved..

Parameters:

Start Date	Date selection control.
End Date	Date selection control.

View (Button): To view report based on the parameter values provided.

Report Format:



Also shows tabular report for each sales user's sales, no. of order, average order value and average margin.

Users	No. of Orders	Total Sales	Avg. Order Value	Avg. Margin
Herman	10	£ 2,563	£ 256.30	
Patel	8	£ 1,256	£ 157	
Victoria	7	£ 1,123	£ 160.42	
Robert	5	£ 985	£ 197	

8.1.10. Sales & Cost of Sales:

This report lists the sales and costs of sale along with the profit and margin for each month between a selected time periods.

Parameters:

Start Date	Date selection control.

End Date	Date selection control.

View (Button): To view report based on the parameter values provided.

Report Format:

Month	Sales	Costs	Profit	Margin
November 11	1,650.00	840.00	810.00	49.09%
October 11	87.00	0.00	87.00	100.00%
September 11	2,350.00	0.00	2,350.00	100.00%
TOTAL	**4,087.00**	**840.00**	**3,247.00**	**249.00%**

Print (Button): To print report.

8.1.11. Cash flow Summary:

This page provides a summary of cash flow. It has two sections:

1) Displays the anticipated cash in from sales based on system anticipated delivery dates + distributor selectable (in control panel) the anticipated time for payment receipt (gross including tax, delivery and origination costs).

2) Displays the anticipated payments out for goods ordered goods through the system receipt (gross including tax, delivery and origination costs) + distributor selectable (in control panel) the anticipated time for making payment from delivery address.

System has provision on customer card to set payment terms for individual customer, which will define anticipated time for payment receipt for customer. Assumed here item price includes tax amount.

It is assumed that distributor portal has provision to setup payment terms, which will define anticipated time for making payment. System will access those payment terms through web services.

Parameters:

Start Date	Date selection control.
End Date	Date selection control.

View (Button): To view report based on the parameter values provided.

Report Format:

Date	Receivable Amount	Payable Amount
15-06-2014	£780	0
16-06-2014	£2,954	£780
17-06-2014	£1875	£2,954
Total	Total receivable amount	Total payable amount

Print (Button): To print report.

9.0. Web services

Web services are needed to access item and supplier details from Advantage website. This is required in case of distributor registered with Advantage Group. Otherwise required data setup happens in system itself.

System requires following web services,

1. Item Web services to access item information from,
   a. Advantage database
   b. Distributors database
2. Supplier Web services to access supplier information from,
   c. Advantage database
   d. Distributor database.

Item web services should have two different functions,

*GetItem(ItemID):*This function should retrieve item basic information in following form.

Attribute	Data Type	Comments/Description
Product ID	Text	Unique product id. Mandatory.
Product Name	Text	Product name.
Product description	Text	Product description.
Product Category	Text	
Supplier ID	Integer	From supplier master.
Image Path	Text	Item image
Supplier Item No.	Text	Supplier Item number.
Advantage Item No.	Text	Advantage item number.
Item dimension	Text	Item dimension
Item specification	Text	Item specification
Item colour	Text	Item colour.

Based on the quantity entered on enquiry lines system will call GetItemDetails function.

GetItemDetails(ItemID):

This function should retrieve all item related information including item price, cost and charges details in flowing form.

Attribute	**Data Type**	**Comments/Description**
Id	*Integer*	Identity field.
Product ID	Text	Dropdown to select product from product master.
Quantity	Decimal	Product Quantity.
Cost	Decimal	Product cost.
Print Cost	Decimal	Print cost.
Origination Cost	Decimal	Origination Cost.
Carriage Cost	Decimal	Carriage Cost.
Selling Price	Decimal	Selling Price.
Origination price	Decimal	Origination price.
Carriage price	Decimal	Carriage price

Supplier Web services should have function GetSupplier(SupplierID).
GetSupplier(SupplierID): This function should retrieve supplier basic information and supplier contact information as shown below.

Attribute	**Data Type**	**Comments/Description**
Supplier ID	Integer	Identity field.
Supplier Name	Text	Supplier name.
Address 1	Text	Supplier address.
Address 2	Text	Supplier address.
Town	Text	Supplier town.
County	Text	Supplier county.
Country	Text	Supplier country.
Post code	Text	Supplier post code.
Contact	Text	Supplier contact.
Email ID	Text	Supplier email ID.
Phone No.	Text	Supplier phone no.
Mobile No.	Text	Supplier mobile no.
Turnaround time	Integer	Supplier turnaround time in terms of days.

Supplier contact details:

Attribute	**Data Type**	**Comments/Description**
Contact ID	Integer	Identity field
Supplier ID	Integer	Supplier Id from supplier master
Name	Text	Contact name.

Address	Text	Contact address.
Email ID	Text	Contact email id.
Phone Number	Text	Contact phone.
Sales Contact	Boolean	Decides whether sales contact.
Sample Contact	Boolean	Decides whether sample contact.
Artwork Contact	Boolean	Decides whether artwork contact.

10.0. Integration with SAGE:

1. System has provision to upload customer information directly from SAGE by CSV.
2. System is integrated with SAGE in order to transfer order to distributor’s SAGE system.