Here is a comprehensive Business Requirements Document (BRD) for the **License Tracking Application**:

**Business Requirements Document (BRD)**

**License Tracking Application**

**1. Document Control**

| **Version** | **Date** | **Author** | **Description** |
| --- | --- | --- | --- |
| 1.0 | 2025-07-22 | Business Analyst | Initial Draft Document |

**2. Purpose**

The purpose of this document is to define the business requirements for a **License Tracking Application** that enables tracking of software licenses provisioned to clients. This includes the entire lifecycle from license procurement to renewal, billing, payments, cost and margin calculations, reporting, and alerts.

**3. Scope**

This application will:

* Track software licenses sold to clients.
* Track buying and selling prices, and calculate margins.
* Manage purchase orders (POs), invoices, and payments.
* Monitor license expiry and renewal status.
* Send alerts for licenses nearing expiry.
* Generate detailed and role-based reports with export capabilities.

**4. Stakeholders**

| **Stakeholder** | **Role** |
| --- | --- |
| Sales Team | Manages customer POs & sales |
| Finance Team | Tracks billing and payment |
| Operations Team | Handles procurement & OEM POs |
| Management | Reviews margins and performance |
| IT Administrator | Manages system users and roles |

**5. Functional Requirements**

**5.1 License Management Module**

**Features:**

* Add, update, view, delete license records.
* Fields (but not limited to):
  + Product Name
  + OEM Name
  + Client Name
  + License Date
  + PO from Customer:
    - PO Number
    - Item Description
    - PO Amount
  + PO issued to OEM:
    - PO Number
    - Item Description
    - PO Amount
  + Our Invoice Number
  + Payment Status (Pending / Partial / Completed)
  + Amount Received
  + OEM Invoice Number
  + Amount Paid
  + Margin (Auto-calculated: Amount Received - Amount Paid)
  + Ship-To and Bill-To Address
  + Remarks / Notes

**5.2 Renewal Management Module**

**Features:**

* Track license expiry dates.
* Set configurable renewal reminder windows (e.g., 30, 60, 90 days before expiry).
* Generate renewal pipeline views.
* Send email alerts and dashboard alerts for upcoming renewals.

**5.3 Billing & Invoicing Module**

**Features:**

* Generate invoices for customers.
* Link invoices to respective licenses and POs.
* Track payment status.
* View aging summary.

**5.4 Procurement Tracking Module**

**Features:**

* Maintain POs raised to OEMs.
* Track payment against OEM invoices.
* Link to license and selling price to calculate margin.

**5.5 Reporting & Analytics Module**

**Features:**

* Export reports to Excel/PDF.
* Types of reports:
  + Customer-wise license summary.
  + Product-wise license business.
  + OEM-wise procurement cost.
  + Monthly, quarterly, yearly financial summaries.
  + Expiry and renewal tracking.
  + Margin analysis.
  + Role-wise access to reports.
* Filters:
  + Date range
  + Client
  + Product
  + OEM
  + Payment status
  + License status (Active / Expired / Renewed)

**5.6 Notification & Alerts Module**

**Features:**

* Email and in-app notifications for:
  + Upcoming license renewals.
  + Payment due reminders.
  + License expiry alerts.
  + PO/invoice approval pending.

**5.7 User Management & Roles Module**

**Roles:**

* Admin: Full access to all modules.
* Sales: Access to license entry, customer PO and invoicing.
* Finance: Access to billing, payments, and margin reports.
* Operations: Access to procurement tracking and OEM POs.
* Management: Access to dashboards and all reports.

**6. Integration Between Modules**

| **Module** | **Integration** |
| --- | --- |
| License Management | Core module; interacts with all other modules. |
| Renewal Management | Pulls expiry data from License module; sends alerts. |
| Billing Module | Linked with License and Customer PO data. |
| Procurement Module | Linked with License and OEM PO. |
| Reporting Module | Aggregates data from all modules. |
| Notification Module | Integrated with License & Renewal data for alerting. |

**7. Non-Functional Requirements**

* **Scalability:** Should support growing number of clients and licenses.
* **Security:** Role-based access, data encryption.
* **Availability:** 99.9% uptime.
* **Performance:** Real-time alerts and reporting under 2 seconds.

**8. Assumptions**

* All license data is entered manually or imported via bulk upload.
* Email service is available for sending alerts.
* Each license is uniquely identifiable.

**9. Future Enhancements**

* API Integration with OEMs or CRM systems.
* Automated invoice generation.
* Dashboard with graphical insights.

**10. Appendix**

**Sample Data Fields for License Entry:**

| **Field Name** | **Sample Data** |
| --- | --- |
| Product Name | Microsoft 365 Business Premium |
| OEM Name | Microsoft |
| Client Name | ABC Corp |
| License Date | 2025-07-01 |
| Customer PO Number | PO12345 |
| Customer PO Amount | ₹1,00,000 |
| OEM PO Number | OEM45678 |
| OEM PO Amount | ₹80,000 |
| Our Invoice | INV-78901 |
| Amount Received | ₹1,00,000 |
| OEM Invoice | OEM-INV-321 |
| Amount Paid | ₹80,000 |
| Margin | ₹20,000 |
| Ship-to Address | Bangalore |
| Bill-to Address | Hyderabad |
| Remarks | 10-user license, 1-year validity |