**Danial Dadmohammadi**

**[D365 finance and operations]  ARADA**

**Technical design document**

**for**

**IT-370 |** **Daily Inventory report from ERP and Daily sales report from ERP**

**Revision and Signoff Sheet**

**Change Record**

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Author | Version | Change reference |
| 9/11/2023 | Danial Dadmohammadi | 1.0.0 | Task 370: POS-T92: Daily Inventory report from ERP and Daily sales report from ERP |

**Reviewers**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Version reviewed | Position | Date |
| Nagendra Chitturi | 1.0.0 | Solution Architect |  |

**Approvers**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Version reviewed | Position | Date |
| Awad | 1.0.0 | Senior Manager – Enterprise solutions |  |

**Table of Contents**

Contents

[Table of Contents 2](#_Toc152934610)

[1. Overview 3](#_Toc152934611)

[Objective 3](#_Toc152934612)

[- Adding the dimension name to the existing retail sales form and creating a new form for update inventory level with inspiration of the standard retail sales form. 3](#_Toc152934613)

[References 3](#_Toc152934614)

[Purpose and Overview 3](#_Toc152934615)

[Requirement Overview 3](#_Toc152934616)

[Solution Overview 3](#_Toc152934617)

[Security design 5](#_Toc152934618)

[Security Roles 5](#_Toc152934619)

[Duties 5](#_Toc152934620)

[Privileges 5](#_Toc152934621)

[Process Cycles 5](#_Toc152934622)

1. Overview

## Objective

## Adding the dimension name to the existing retail sales form and creating a new form for update inventory level with inspiration of the standard retail sales form.

## References

|  |  |  |  |
| --- | --- | --- | --- |
| ZOHO ID | Manage Engine ID | Description | Owner |
| POS-T92 | -- | Daily sales report from ERP | Danial, Nagendra |

## Purpose and Overview

At retail store level, retail store transactions should be displayed with the dimension name like size, color, configuration and style name. Moreover, the user needs to report the daily update retail store inventory using a new form.

## Requirement Overview

*Get an update and online report from the store transactions and inventory level.*

## Solution Overview

* After the running of the p-Jobs, all of the retail store transactions would be came back to the ERP. Now, we need a form or report to fetch all of the mentioned data. In order to do that, we have created a new form which reflect the inventory level based on the store ID and company name.
* Also, the retail store transactions should be clear enough. So, we added the dimension name to retail store transactions.

Following are the objects that are involved in the development process.

Soloution name: ARRetailSalesOnhandExport2Excel

Project name: ARRetailSalesOnhandExport2Excel

**Classes:**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARRetailSalesDimansionName\_Extension | Adding display methods |

**Display Menu Items:**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARRetailOnhandInvForm | Opening the new form for inventory |

**Form Extensions:**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| RetailSales.ISLDEV | Adding the dimension name |

**Forms:**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARRetailSalesOnhand | Fetching the inventory of the retail stores |

**Menu Extensions:**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| RetailMain.ISLDEV | Adding a new menu item for inventory retail sales form |

### Security design

## Security Roles

|  |  |  |
| --- | --- | --- |
| **Name** | **Duties** | **Addl Remarks** |
| -- | -- | -- |

## Duties

|  |  |  |
| --- | --- | --- |
| **Name** | **Privileges** | **Addl Remarks** |
| -- | -- | -- |

## Privileges

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Entry Points** | **DATA entity permission** | **Access Level** | **Addl Remarks** |
| ARRetailOnhandInventorySP | ARRetailOnhandSecurityEntryPoint |  | **Unset** | **--** |

## Process Cycles

|  |  |  |
| --- | --- | --- |
| **Name** | **Duties** | **Addl Remarks** |
| -- | -- | -- |