Order Management System Requirements Document

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# 1. Introduction

## 1.1 Purpose

The purpose of this document is to outline the requirements for the development of an Order Management System (OMS). The OMS will facilitate the end-to-end process of managing customer orders, tracking inventory, and coordinating supplier relationships. The system will streamline order creation, tracking, and history management, while providing various user roles with appropriate access levels to manage different aspects of the order process.

## 1.2 Scope

This document covers the functional and non-functional requirements of the OMS. It includes details on the data model, user roles, and system features necessary to achieve the goals of efficient order management and accurate tracking.

## 1.3 Definitions, Acronyms, and Abbreviations

OMS: Order Management System

SAP: Systems, Applications, and Products in Data Processing

ERP: Enterprise Resource Planning

API: Application Programming Interface

# 2. System Overview

## 2.1 System Purpose

The OMS is designed to manage customer orders from creation to delivery. The system integrates with external platforms like Salesforce (for customer data) and SAP (for supplier and product data). It allows users to track orders, view order histories, and manage products and inventory efficiently. The OMS supports various user roles, each with specific access permissions tailored to their responsibilities.

## 2.2 System Context

The OMS will interface with:

* Salesforce CRM: To manage and retrieve customer information.
* SAP ERP: To manage supplier and product information.
* Payment Gateways: To process various payment methods (e.g., credit card, bank transfer).
* Shipping Services: To handle different shipping methods and track shipments.

# 3. Functional Requirements

## 3.1 Data Model

### 3.1.1 Order

* Id: Unique identifier for the order.
* Order Date: The date the order was placed.
* Status: The current status of the order, with possible values:
  + Pending
  + Confirmed
  + Shipped
  + Delivered
* Total Amount: The total monetary value of the order.
* Payment Method: The payment method used by the customer, which can be:
  + Credit Card
  + Bank Transfer
  + Purchase Order
* Shipping Method: The shipping option chosen by the customer, which can be:
  + Standard
  + Express
  + Freight
* Customer: Reference to the customer placing the order

### 3.1.2 Customer (Salesforce)

* Id: Unique identifier for the customer.
* Company Name: The name of the company associated with the customer.
* Company Address: The physical address of the customer's company.
* Contact Name: The primary contact person for the company.
* Contact Email: The email address of the contact person.
* Contact Phone: The phone number of the contact person.
* Date Joined: The date the customer was registered in the system.
* Account Status: The current status of the customer account (e.g., Active, Inactive).

### 3.1.3 Supplier (SAP)

* Id: Unique identifier for the supplier.
* Company Name: The name of the supplier company.
* Company Address: The address of the supplier company.
* Contact Name: The primary contact person for the supplier.
* Contact Email: The email address of the supplier contact person.
* Contact Phone: The phone number of the supplier contact person.

### 3.1.4 Product (SAP)

* Id: Unique identifier for the product.
* Name: The name of the product.
* Description: A detailed description of the product.
* Barcode: The barcode associated with the product for scanning purposes.
* Picture: A picture of the product.
* Price: The price of the product.
* Category: The category to which the product belongs.
* Stock Quantity: The current quantity of the product in stock.
* SupplierID: Reference to the supplier providing the product.

### 3.1.5 Order Item

* Id: Unique identifier for the order item.
* Quantity: The quantity of the product ordered.
* Order: Reference to the order to which this item belongs.
* Product: Reference to the product that has been ordered.

## 3.2 Main Features

### 3.2.1 Order Creation

* Ability to create new orders by selecting products and specifying quantities.
* Integration with Salesforce to automatically retrieve and populate customer data.
* Option to choose a payment method and shipping method during order creation.

### 3.2.2 Order Tracking

* Monitoring the status of orders (e.g., pending, processed, shipped, delivered, cancelled).
* Integration with shipping services to track the real-time location and status of shipments.

### 3.2.3 Order History

* Viewing past orders, including details about products ordered, prices, and customer interactions.
* Ability to filter and search past orders by date, status, customer, and other criteria.

### 3.2.4 Order Editing

* Ability to modify existing orders, such as changing quantities, adding/removing items, or updating shipping methods before the order is confirmed or shipped.
* Notifications to relevant stakeholders upon order modifications.

# 4. Roles and Permissions

## 4.1 Admin

* Permissions: Full access to all data and features.
* Capabilities:
* View, create, edit, delete orders.
* Change order status.
* Manage system configurations and user roles.

## 4.2 Sales Representative

* - Permissions: Access to customer orders.
* - Capabilities:
  + View, create, and edit orders.
  + Change order status for orders they manage.
  + Access customer information relevant to their sales.

## 4.3 Inventory Manager

* Permissions: Access to product and inventory data.
* Capabilities:
  + Manage inventory levels and process shipments.
  + View and update order statuses related to inventory.
  + Generate reports on stock levels and inventory turnover.

## 4.4 Supplier

* Permissions: Access to orders involving their products.
* Capabilities:
  + View orders related to their products.
  + Update stock quantities and product details.
  + Communicate with the inventory manager for stock replenishment.

# 5. Non-Functional Requirements

## 5.1 Performance

* The system should handle up to 1,000 simultaneous users without performance degradation.
* Orders should be processed and confirmed within 2 seconds on average.