MRP EASY

(Create Order)

Functional Requirement Specification

Date: 10th May, 2021
Version 1.0

1. Create Order Flow

1.1 Stock Settings – Product Group – <mark>As it is MRP Easy</mark>

- In order to create product groups there will be following details;
    - o Name of product group
- Listing of product groups with following details:
    - o Number
    - o Name
- Will be able to search for product group and will also able to save the search if needed.
- Will able to update edit when required.
- **Note: all of the things mentioned in the module is same as MRP Easy. If there are any changes then need to discuss for the same.**

1.2 Stock Settings – Storage Location <mark>As it is MRP East</mark>

- In order to create storage location there will be following details;
    - o Name of storage location
- Listing of storage location with following details:
    - o Name
- Will be able to search for product group and will also able to save the search if needed.
- Import from CSV
- Will able to update edit when required.
- **Note: all of the things mentioned in the module is same as MRP Easy. If there are any changes then need to discuss for the same.**

1.3 Stock Settings – Unit of Measurement – <mark>As it is MRP East</mark>

- In order to create unit of measurement there will be following details;
    - o Name
    - o Standard unit conversion
        - ▪ Name of unit
        - ▪ Rate
- Listing of unit of measurement with following details:
    - o Name
- Will able to update edit when required.
- **Note: all of the things mentioned in the module is same as MRP Easy. If there are any changes then need to discuss for the same.**

1.4 Item Master

- Create order : there will be following details
    - o Part No (auto generated)

- o Copy item: in this if the need to copy item of existing products then can select that product.
- o Part description
- o Select product group and can create new product group if needed
- o Unit measurement and can create new if need.
- o This is a procured item (need to check with our products if can be applied or not)
- o Selling price
- o Default storage location : can select default storage location or create new if needed
- o Reorder point logic :
  - Suppose we have set reorder point value as 5 then when order is placed for 5 pcs then automatically based on reorder point value the item will move to critical hand means that particular item needs to be manufactured.
- Once above details are saved after that need to add following details:
  - o Vendor:
    - As it is MRP Easy.
  - o Add Vendor for part :
    - As it is MRP Easy.
  - o Add vendor :
    - Remove tax rate
    - Delivery terms
    - Payment terms
  - o Notes:
    - Will be able to add notes if required.
    - Will able to view listing of it and make changes to it when required.
- Listing of items will have following details:
  - o Will able to filter by Part no, part description, group number, group name, expected available, reorder point, uom, and cost.
  - o Choose columns
  - o Bulk editing: when clicking on bulk editing it will allow user to edit more than one records update at once. It will show data in tabular format.
  - o Will able to view report for each item.
  - o Export pdf and csv
  - o Import csv
  - o Will be able to save search
- BOM : As it is MRP Easy
- Routings :
  - o Work station group
    - Attach file
    - Type
- **Note: all of the things mentioned in the module is same as MRP Easy. If there are any changes then need to discuss for the same.**

1.5 Create Order

- Create order will required following details:
    - Number & <mark>Revision (rv1, rv2, rv3)</mark>
    - Select customer: can select from existing or can create new if needed.
    - <mark>Status (quotation, waiting for confirmation, confirmed, pro-forma invoice). Copy all other statuses of mrp.</mark>
    - Currency (INR default)
    - Delivery date
    - Reference if any
    - Delivery terms
    - Shipping address : can add new shipping address from add customer screen or can select from existing
    - Internal notes
    - Export pdf
    - <mark>PDF: Clicking on it will give various options like want to download pdf for order confirmation or quotation.</mark>
- Product Group Details:
    - Select product group : can select from existing or can add new group
    - Select product :
        - Only those products/items will come which are added in the particular group.
        - Can select item from existing or can add new item.
        - <mark>Search for product code</mark>
    - <mark>Select accessories</mark>
    - Price pr UoM
    - Discount
    - Subtotal
    - Delivery date
- Will able to view listing of customer orders and will able to update details when required.
- Will able to view listing in two views:
    - List view
    - Sales pipeline:
        - In these orders will be shown according to the status of each order like Quotation, Waiting for confirmation, Confirmed, Waiting for confirmation, In production, Ready for shipment.
        - Will able to filter it by various users
- Will able to filter records by customer/items, number, customer number, customer name, status, product status, invoice status, payment status, created, delivery date.
- Will able to view report
- Choose columns
- Export to pdf (15 pages max)

- Export to CSV
- **Following section is not considered as of now:**
    - o Once these details are saved other two columns will be added:
        - ▪ Cost : cost of product
        - ▪ Profit : profit amount from the order
        - ▪ Status : it will show various status like booked, not booked, ready for shipment
        - ▪ Source : It will show manufacturing order's ID
        - ▪ Shipped
    - o Check stock and book items
    - o Estimate costs and dates
    - o Invoices – only listing
    - o Shipments – only listing
    - o Notes
    - o Reports
- **Note: all of the things mentioned in the module is same as MRP Easy. If there are any changes then need to discuss for the same.**
- **Stock -> Item Code**