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*Document Reference*

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| **#** | **Document Name** | **Description** |
|  | Business requirements | Document with description of requirements given by the customer. |

*Glossary of Terms*

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| **#** | **Acronym** | **Interpretation** |
| 1 | CSR | User role of Customer Sales Representative |
| 2 | PMG | User role of Problem Management Group |
| 3 | M | Priority “Mandatory” |
| 4 | O | Priority “Optional” |

# Introduction

The subject of development is the web-based system for making online orders and service management. The purpose of this System is to get new clients and make the process of service ordering and management easier and more convenient.

## 1.1 Document Purpose

The general purpose of this document is to define actions that a system must be able to perform and specify them according to user’s role.

# General requirements

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| Priority | Requirements description | Req. number |
| M | The system shall provide the following user roles:  - Admin  - Client  - CSR  - PMG  -Visitor (unregistered user) |  |
| M | The system shall save personal information of registered users (last name, first name, phone number, email, password, notifications settings). |  |
| M | The system shall allow registered users to log in to the system through the authentication form: a user must enter username (an email address will be used as a username) and password. |  |
| M | The system shall provide the ability to log out of the system. |  |
| O | The system shall provide the ability to reset password. |  |
| M | The system shall provide the ability to view product catalogue according to the region for all users.The system shall determine region for registered clients (by account address domain). For Admin/CSR/PMG/unregistered users the region is set as Kyiv by default. User shall have the ability to change the region.. The priority (when displaying catalogue) is given to region, which was set by the user. Google Maps service is used for work with addresses. |  |
| M | Users with “Admin”/”CSR” role shall have the ability to view/sort product catalogue by specified parameter: product name, product type, price, region; filter by product type and region;search by product name. | 2.7 |
| M | The system shall automatically change the status of service:   * from “active” to “suspended” after client’s suspend order; * from “active” to “deactivated” after client’s disconnect order; * from “suspended” to “active” after client’s resume order. | 2.8 |

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| 2.9 | Users with “Admin”/”CSR”/”PMG” role shall have the ability to view/sort orders by specified parameter (order status, order aim, date of order, product name or region); filter list of orders made by all users by specified parameter:   * status of order (“created”, “in progress”, “cancelled”, “completed”); * order aim (“new”, “modify”, “suspend”, “resume”, “disconnect”); * date of order; * region   or search by client’s last name/ phone number. | M |

# User roles

## Visitor(unregistered user)

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| Priority | Requirements description | Req. number |
| M | Shall have the ability to create accounts with “Client” role through the registration form (email, password, first name, last name, phone number). | 3.1.1 |

## Admin

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| Priority | Requirements description | Req. number |
| M | Shall have the ability to create users with “CSR”, “PMG”, “Client” role. | 3.2.1. |
| M | Shall have the ability to grant/revoke role to/from the user. | 3.2.2 |
| M | Shall have the ability to create/view/edit product catalogue: add new products (products characteristics should be displayed according to product type); add new product type; add product characteristics; update product characteristics value; change status of product from “active” (visible in product catalogue) to “inactive” (not visible in product catalogue; can’t be ordered by clients). | 3.2.3 |
| M | Shall have the ability to set/edit discounts through discount form (Admin should set discount title, choose product type, region, product name from the list of products available in this region, set start date of discount period, end date of discount period, and amount of discount (in percentage)). Information about discounts (title,region, product name, discount, start date, end date) is editable. | 3.2.4 |
| M | Shall have the ability to view/edit personal account information (last name, email, phone number, address) of all users. | 3.2.5 |
| M | Shall have the ability to search accounts by user last name/phone number; filter by region; sort by user last name. | 3.2.6 |
| O | Shall have the ability to add/edit information about marketing promotions (terms of promotions, start date, end date). | 3.2.7 |
| M | Shall have the ability to designate responsible CSR/PMG for client orders/complaints (if change of responsible person is needed). | 3.2.8 |

## Client

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| Priority | Requirements description | Req. number |
| M | Shall have the ability to view/edit personal account information (first name, last name, email, password, telephone, address, notification settings). |  |
| M | Shall have the ability to link/be linked by Admin or other users with “Client” role to more than one address domain. |  |
| M | Shall have the ability to view the list of all ordered by account services according to address, where it is provided. | 3.3.3 |
| M | Shall have the ability to place the order by choosing the product from product catalogue. | 3.3.4 |
| M | Shall have the ability to suspend/deactivate/ resume (suspended) service (order aim - suspend/disconnect/resume) | 3.3.5 |
| M | Shall have the ability to view the list of orders made by account during all time/specified time period including name of product, price, date of order, status of order. | 3.3.6 |
| M | Shall have the ability to view complaints made by the account / place a complaint by completing a complaint form (form includes “Email” field, “Complaint title” field, “Complaint reason” drop-down list, “Content” textarea, “Service” drop-down list (with active client’s product instances information (address with product name); visible if complaint reason is “service problems”); “Order” drop-down list (with client’s orders information (id with product name and price) which statuses are “created” or “in progress; visible if complaint reason is “order problems”); “Submit” button). | 3.3.7 |
| M | Shall have the ability to change status of order from “created” to “cancelled” | 3.3.8 |

## CSR

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| Priority | Requirements description | Req. number |
| M | Shall have the ability to edit information (product name and address domain) about orders made by clients. |  |
| O | Shall have the ability to place client’s order by completing the order form. | 3.4.2 |
| M | Shall have the ability to change the status of order:   * from “created” to “in progress” or “cancelled”; * from “in progress” to “completed” or “cancelled”. | 3.4.3 |
| O | Shall have the ability to view the history of changes in order statuses with following information: order id, last name of the person who changes the status (id is set automatically by the system as “responsible\_id” field), new status of order, date of change. | 3.4.4 |

## PMG

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| Priority | Requirements description | Req. number |
| M | Shall have the ability to change the status of complaint from “created” to “under consideration” |  |
| M | Shall have the ability to respond to client complaints by filling the response area in the complaint form. The status of complaint shall be automatically changed to “consideration completed”. |  |
| M | Shall have the ability to view information about complaints made by clients. The following information is required: complaint id, type of complaint, title of complaint, content of complaint, user name (first name with last name, who registered the complaint), product instance (if the type of complaint is connected with service problems), date of creating complaint. |  |
| O | Shall have the ability to filter the list of complaints by region / complaint type/ period of time during which complaints were created or search by specifying client’s last name/ phone number |  |

# Notification module

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|  | Requirements description | Req. number |
| M  O  M  M  M  M | The system shall automatically send notifications via email to all users with role “Client” about:   * successful registration; * password reset; * service / complaint status changes * new order made/changes in order * changes in prices for services, provided for user; * new discounts. |  |
| M | The system shall automatically send notifications via email to users with role “Client” whose notification settings are turned on about:   * new services, provided by the company; * new locations of services; |  |
| O | The user with “Admin” role shall have the ability to edit notification email text. | 4.1.3 |

# Report module

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| Priority | Requirements description | Req. number |
| M | The system shall provide the ability for users with “CSR” role to download report with charts in xls/xlsx format with information about:   * orders made during specified time period/all time by client id/ group of clients id / region. This report should contain following information: total amount of orders; amount of orders with status “created”; amount of orders with status “in progress”; amount of orders with status “completed” according to product name ordered. Charts shall show total number of activation/deactivation for each product during specified period of time: by dates (if period is less or equal to one month); by weeks (if period is more, than one month, but less, than one year); by months (if period is more, than one year). * clients service statuses during specified time period by location.This report should contain following information: amount of services with status “active”; amount of services with status “deactivated” according to users. |  |
| M | The system shall provide the ability for users with “PMG” role to download report with charts in xls/xlsx format with information about complaints made during specified time period/ all time by client id / last name/ group of clients id / region . This report should contain following information: total amount of complaints; amount of complaints by complaint status (“created”; “under consideration”; “consideration completed”) or by complaint type (service problems, order problems, technical problems). Charts shall show total number of complaint types during specified period of time: by dates (if period is less or equal to one month); by weeks (if period is more, than one month, but less, than one year); by months (if period is more, than one year). |  |