**Enterprise resource planning System   
  
 For**

**Poonam Coatings**

**Software Recruitment Specifications**

**Version 1.0**

1. **Document Release History**

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| --- | --- | --- | --- | --- |
| Sl. No. | Version Number | Release Date | Prepared By | Reasons for New Release |
| 1 | 1.0 |  | BA | Initial Release  (Time to Time Document will be Updated with New Version Release) |
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1. **Circulation Details**

A soft copy of this version of the document is available to all employees on our & Poonam coating Team.

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1. **List of Amendments Made on Previous Version 1.0**

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| Sl. No. | Section No. /  Page No. | Description of the amendment | Approved by | Change Request No. & Date |
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***1. Executive Summary***

* **Project Purpose**: Currently the company has an ERP & CRM system but due to the multiple complexities the level of complexity is too high also it lacks many features that they want, so we are making a new system that would be a much simpler and customized version asper there need.
* **Benefits:** The new system that we are creating will have certain customized features that are supposed to increase the efficiency of the flow of the system, an improvement in the CRM system features can also be seen and the Proposed ERP system can have many cost saving and also manual labour time
* **Key Objectives:** The primary goal of the project is to make a system that is easier to use and user-friendly so every engaging person can use it without any confusion and also needs to have time and money-saving features is our main aim to achieve**.**

## 1.1. Purpose

The purpose of this document is to present a detailed description of creation of ERP & CRM System. It will explain the purpose and features of the system, the interfaces of the system, what the system will do, the constraints under which it must operate and how the system will react to external stimuli. This document is intended for both the stakeholders and the developers of the system

## 1.2. Scope of Project

The primary objectives of this project are as follows: To implement a fully functional ERP software solution that integrates various business processes, including finance, inventory, human resources, and customer management. Creation of a system that can enhance data accuracy, accessibility, and reporting capabilities. By improve collaboration and communication among departments by creating a centralized platform. This system will help ensuring optimize resource allocation, reduce operational costs, and increase productivity. Also by the system scalability and flexibility to accommodate future business growth and changing needs.

***1.3 Project Scope***

* **In-Scope:** The ERP and CRM system will consist of all the features mentioned in the Functional Requirement section (Pg.)
* **Out-of-Scope:** The system that is to be designed will completely be used by the company staff itself, with no other person from dispatch or outdoor managers using this system
* **What not to be included in the project (Features)**
  + Complexity of the website.
  + More time to reload the website
  + No need for any specific design, or theme for the system  
    simple and classic user is required
  + Mobile access

**2. Overall Description**

* 1. **Product Perspective**
* **Business Perspective**

What are the goals of business clients?

The client's objective is to have a simple, Reliable system with no complexity, even a nontechnical person should be able to use it. The key features that they expect are:

* + Role base access
  + ERP system with all inventory and sales features
  + CRM system with all the management features
  + Barcode setup for reporting an inlet & outlet of the product
  + Chat setting for the internal stakeholders and managers
  1. **Product Functions**
* Functionalities
  + Login – login, forget the password, remember me
  + All backend roles are clearly defined in functional requirements
  1. **Operating Environment**
* The System will be supported by the following environments:
  + Browsers – Latest version of the IE, Mozilla, Google Chrome, Safari, etc.
  + Operating systems – Android, IOS
  1. **User Characteristics**

The system is supposed to be used by only the internal staff of Poonam Coatings, no outside vendor or delivery person will have any access to the system.

The access will be allotted on the basis of the hierarchy level, consisting of Super Admin, Admin, and managing people in sales, customer relationship person, etc.

* Super Admin (3): The person who will have complete access to the portal can edit, approve, and do other activities; usually will be the owner.
* Admins (1/2): This person will have access to more than one department or multiple departments’ access but does not have any complete access like Super Admin; usually will be used by any middle managers.
* Dept. Managers (3) :
  + - 1. Sales Manager
      2. Purchase Manager
      3. Dispatch Manager

These persons will have any specific access to the particular department and no access in any other departments

These are the suggested fields that we will be having in the system, but for the version one we will be only working on fields that have Version 1 or V1 mentioned next to them.

1. **Dashboard + Profile ( V1 )**
2. **Buyers & Suppliers ( V1 )**
3. **Calendar Management ( V1 )**
4. Sales & Purchase (done)
5. Inventory
6. Production
7. Payments
8. Reports & Intelligence
9. Resource planning
10. Accounting Integration/ Tally
11. **Settings ( V1)  
     User Management  
     Email Management**

**3. Functional Requirements**

Below are the functional details that are required

**3.1 User management**

User Management will deal with the Access of the user management ensures security, access control, and personalized experiences for users.

Features that are needed for a user management are as follow

* + 1. **User Registration and Authentication:**

User registration and authentication are critical components of user management in an ERP and system. These processes ensure that only authorized individuals can access the system and interact with the organization's data. Here's a comprehensive explanation of this sub-feature:

* **User Information:**

**Description:** During user registration, individuals are required to provide certain personal details, which will be used to create their user accounts in the ERP & CRM system.

**Log in Fields (for managers and subordinates)**

**1. Eamil Field**

* **Field Name**: Email ID
* **Description**: Unique identifier for user access.
* **Constraints**:
  + Length: Minimum and maximum character limits.
  + Format: Alphanumeric characters, special characters allowed/not allowed.

**2. Password Field**

* **Field Name**: **password**
* **Description**: Secure input for user password
* **Constraints**:
  + Length: Minimum and maximum character limits.
  + Format: Requirements for special characters, uppercase, lowercase, and numerical characters.
    - * Minimum length (e.g., at least6- 8 characters).
      * Combination of upper and lower-case letters.
      * Inclusion of numbers and special characters.
      * No common or easily guessable words.

**4. Login Button**

* **Element Name**: **login button**
* **Description**: Initiates the login process.

**For Dashboard following can be included:**

1. **Sales Performance:** Showing metrics like sales revenue, top-selling products, sales by region, etc.
2. **Inventory Status:** Details on current stock levels, reordering status, and fast-moving items.
3. **Financial Metrics:** Including cash flow, accounts receivable/payable, profit margins, etc.
4. **Production/Manufacturing Status:** Production output, work-in-progress, machine uptime, etc.
5. **Supply Chain Metrics:** Supplier performance, lead times, procurement status, etc.

**2 BUYERS & SUPPLIERS**

**The page will have**

**a) A Global search (**for both sales & Purchase contact**)**

**b) A Filter to classify category (**drop down sales, purchase & both**)**

**c) Add Buyer & Supplier**

**(I) add single company**

By clicking add single company a pop up will appear with scroll bar consisting following fields

**(i) A contact person detail fields**

* Name
* Email Id
* Phone Number

**(ii) Company detail**

* Tag (Supplier / Buyer / both)
* GST Number (fetch system/manually ) API
* Company Name
* Company Email
* Address 1/ Address 2 \*\*  
  ( PS: It is necessary to have a section to add multiple locations for a single company , while raising invoice or any document they must be asked which one location to be sent an user can add different locations for a same company
* Pin code
* City
* State

**CREATE COMPANY BUTTON**

**(II) Upload multiple company**

There will be a drop box for uploading an Excel file, were you can drag and drop or even select a data sheet

PS: The file that will be uploaded only if it follows the specific pattern of column

**d) Below there will be the list of buyers and suppliers in series**

The following data will be shown horizontally in each company’s Row with scroll or next, previous arrow.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Company** | **Category** | **City** | **Contact no** | **Email ID** | **+** |
| Xyz Pvt ,  LOGO | Supplier | Abad | 9898989 | xyz@gmail.com |  |
| ABC LLC, LOGO | Buyer | Thane | 3454667 | abc@gmail.com |  |

When any of the company or logo is clicked they will be redirected to a separate page that is containing

**Company name at the top along with**

**(I) delete this company**

**(II) Add/Edit / View Company detail**

Company Name   
 Company logo   
 GST NO   
 Contact detail  
 Company Email ID

**SAVE**

**(III) Add/ Edit any company user**

First name

Last Name   
 Email Required

**Save / Delete**

**(IV) Add/Edit /View Billing Address**

Primary name   
 Address 1 / Address 2  
 City   
 Country   
 State  
 GST NO   
 **Save / Delete**

**(V) Add/Edit / View Delivery Address**

Primary name   
 Address 1 / Address 2  
 City   
 Country   
 State  
 GST NO   
 **Save / Delete**

**(VI) Company balance**

Date | Payables |Receivables |Supply due | Return

**3 Calendar Management**

**Supply/ Purchase Scheduling and Management & Tracking**

* **Title:** Name or title of the Order or lead.
* **Date and Time:** Start and end date/time.
* **Priority Level:** Classification of task urgency/importance.
* **Location:** Physical or Virtual location of the event.
* **Description:** Details about the event.
* **Participants:** Individuals or groups involved. **Assigned To: Individuals or teams responsible for task completion.**
* **Deadline/Due Date:** Date by which the task needs to be completed.

**Accessibility and Views:**

* **Multiple Views:** Day, week, month, agenda, etc.
* **User-Specific Views:** Customizable views based on user preferences.
* **Access Permissions:** Control who can view, create, edit, or delete events.

**Notifications and Reminders:**

* **Alerts:** Reminders for upcoming events.
* **Customizable Notifications:** Email, pop-up alerts, SMS, etc.

**Collaboration Tools:** Comments, file attachments, or chat functionalities within calendar events/tasks for team collaboration.

**Setting:**

**Profile related**

* + - 1. **Update User Details**

There will be two sections,

(I) Personal info

1. You can upload a photo (e.g. Validation: in PNG/ JPEG format with specific size 2-5 MB)
2. First Name, Last Name
3. Mobile Number
4. Email id

(ii) Password

1. Current Password
2. New Password
3. Renter New Password

**Change password button**

* + - 1. **Update Company Details ( super admin only )**
    1. Name of the company ( 100 words)
    2. Type of industry ( 100 words)
    3. Founding year ( drop down)
    4. GST detail /number
    5. Address line 1/2 (100 words)
    6. Official email ID
    7. Contact Number
    8. About (500 word) if needed

* + - 1. **Add Member ( User management )**
  1. **Add and View all member button**

It will show user name, position, email id you can add new user (add email ID), there position as per the access is defined.

* 1. **Email invitation**

A text box will be given where email will be written for multiple invitation comma can be added

Send Invitation Button (by clicking this , an email invite will be sent to the mentioned Email Id, then the recipient can join by clicking on the job button seen in the email message

* + - 1. **Email management**

**Admins**

1. **Full Name:**
   * **Description:** Users should provide their full name, typically consisting of a first name and a last name.
   * **Validation:** The system should validate that the full name field is not empty and does not contain special characters or digits. A typical validation might ensure that both the first and last names are within an acceptable character limit.
2. **Email Address:**

* **Description:** Users need to enter a unique and valid email address.
* **Validation:** The system should validate the email address format, ensuring it contains the "@" symbol and a valid domain. It should also check that the email address is not already associated with an existing user account.
* **Email Validation:** If a user enters an invalid email format (e.g., missing "@" symbol), the system should immediately display a message near the email field, such as "Invalid email format."

1. **Username:**

* **Description:** Users are required to choose a unique username that will be used for login.
* **Validation:** The system should validate that the chosen username is unique among all registered users. Additionally, it should check for any reserved characters or forbidden words.

1. **Password:**

* **Description:** Users must create a secure password.
* **Validation:** Password validation should include the following criteria:
  + Minimum length (e.g., at least6- 8 characters).
  + Combination of upper and lower-case letters.
  + Inclusion of numbers and special characters.
  + No common or easily guessable words.
* **Password Strength:** When a user creates a weak password (e.g., too short or lacking complexity), the system should indicate the password requirements and offer suggestions for improvement
* Password reset and account recovery emails.