**EazeFin Finance Solutions**

1. **GENERAL INFORMATION**
2. **Introduction:**

The function requirement document outlines the specific functions, operations and capabilities that a system, product or software application must perform to satisfy the needs of its user. These requirements serve as the foundation for design, development and testing ensuring that the final deliverable meets the desired objectives and user expectations.

* 1. **Purpose:**

The purpose of the document is to provide a high-level directive for the functional requirements for the ‘Eaze Fin Finance Solutions’ web application. This document will help the audience for to understand the behavior of the web application for development.

* 1. **Intended Audience:**
* Development Team
* QA Team
* Business Analyst
* DB Team

1. **Functional Requirements:**

When the user starts the web application, it should navigate to the landing page of Eaze Fin Finance Solutions web application.

1. **Landing Page:**
   1. The Landing Page should contain the following fields at top section:

* EazeFin Logo
* Sign In
* Company Registration
* Helpdesk
  1. Main Landing page displays the title “EazeFin Financial Solutions” in top.
  2. Below the title “EazeFin Financial Solutions” the following supported services should be available:
* Analytics and Charts
* Money Management
* Employee Management
* Investment and Spend
  1. The Landing Page should contain the following fields at the bottom:
* Our clients field
* Copyright logo with the name EazeFin

A screenshot of a computer

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**Figure 3.1**

* 1. **EazeFin:**

The EazeFin button on the top left should navigate to the Landing Page of the EazeFin Finance Web Application. (This EazeFin refers to the EazeFin button on the top left of the Landing Page.**)**

* 1. **Sign In**

The Sign In button on the top of the Landing Page should navigate to the Sign in Page of the Web Application on clicking.

* 1. **Company Registration**

The Company Registration button on the top of the Landing page should navigate to the page of Company Registration by clicking.

* 1. **HelpDesk**

The HelpDesk button on the top right of the Landing page should navigate to the HelpDesk page of the web application.

* 1. **EazeFin Financial Solutions logo:**

The EazeFin Financial Solutions logo should navigate to the Landing page of the web application.

* 1. **Services We Provide field:**

The Services We Provide field should contain the following:

* + - Analytics and Charts
    - Money Management
    - Employee Management
    - Investment and Spend
  1. **Our clients:**

The Clients field should display the list of the clients available.

* 1. **Copyright:**

The ©Copyright notice of the application should appear on the bottom of the landing page.

1. **Company Registration:**
   1. **Introduction**:

Users can create an account by providing necessary information such as name, email address, password, and any additional required details.

Ensure validation of unique GSTIN, Phone number and E-mail addresses to prevent duplicate accounts.

The form should have the following fields:

1. **Company Name**: A text input field for the company name.
2. **Company Address**: A text input field for the company address.
3. **Phone Number**: A text input field for the company’s contact number.
4. **GST-ID**: A text input field for the Goods and Services Tax Identification Number.
5. **Owner Name**: A text input field for the owner’s name.
6. **Password** & **Confirm Password**: Text input fields for setting up a password.
7. **Description**: A text area for users to provide a brief description of their company.

All fields are mandatory and must be filled out before submission.

The Password and Confirm Password fields should match before allowing form submission.

A Submit button should be provided for users to submit their registration information.

A screenshot of a phone

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Fig 2.1

1. **User Login**

Users can login into their account by providing necessary information such as email and password.

1. **User Roles and Tabs:**

The page has two tabs at the top: “Admin” and “Employee.” Users can select their role (Admin or Employee) by clicking on the respective tab.

1. **Login Credentials:**

Users must enter their Username and Password in the provided fields. Both fields are mandatory before proceeding.

1. **Login Button:**

A Login is present, and it becomes enabled only when both the Username and Password fields are filled.

1. **Password Recovery:**

Users who forget their password can click on the “Forget Password?” link. This link leads to a password recovery/reset process.

1. **Create Account:**

New users can register by clicking the Create Account button. This button guides them through the account creation process.

A screenshot of a login page

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Fig 1.2

1. **Company Dashboard**

* The top section of the company dashboard contains:
* Logo and name (EazeFin) of the application.
* Name of the company
* Owner’s name
* On clicking the logo or EazeFin landing page opens.
* The left frame consists of a hamburger icon. On clicking this icon following options pop up:
* **Dashboard** - This button will load the company dashboard.
* **View Employees** - On clicking this button the view employees page will open where the owner can view or add or delete the employee details.
* **Analytics** - This button will open the analytics page which contains the company’s performance graph. It will also have each employees’ performance graph.
* **Sales Approvals** – This button will open the sales approval page. Here the owner can either approve or deny the sales request of the employee.
* **Expenses** – On clicking this page the owner can view the company’s expenses.
* **Transaction History** - This button will open the transaction history page where the sales transaction history will be displayed.
* **Settings**
* **Logout**
* The right frame contains the following tabs:
* No of Employees
* Capital amount
* Total sales
* Profit or loss
* Company performance graph
* Rank list
* Description
* The footer contains the copyrights information of the application.
  1. **View Employees**

The view employee’s area in the Add Employee contains the following:

* “Add Employee” section.
* List of the employees (Emp 1 to Emp n).
* Each employee has **Details**, **Edit** and **Remove** buttons.
  + 1. **Details**: Details field should display the details of the employee.

The fields are:

* + - * **Name**: This field displays the current employee’s name.
      * **Email**-**ID**: This displays current Employee’s Email Id.
      * **Date of Birth**: This field displays current the Employee’s Date of Birth in the format “DD-MM-YYYY”.
      * **Phone Number**: This field displays the current Employee’s Phone Number.
      * **Age**: This field displays the current Employee’s age.
      * **Aadhar Number**: This field displays the current Employee’s Aadhar Number.
      * **Employee ID**: This field displays the current Employee’s ID.
      * **Address**: This field displays the current Employee’s Address.
      * **Salary**: This field displays the current Employee’s current salary.
    1. **Edit** **button**: Should enable editing the Employee data on clicking and update the record in the Employee database.
    2. **Remove button**: Should remove the Employee record from the database on clicking.
* After clicking on the **Add** Employee button:

A form for employee details should appear with the following fields: \

* + - **Name:** This field takes the employee’s name as an input.
    - **Email-ID:** This field takes Employee’s Email as an input. The email id should be a valid email id in the format “xyz@abc.com”.
    - **Date of Birth:** This field takes the Employee’s Date of Birth as an input in the format DD-MM-YYYY.
    - **Password:** This field takes the Password as an input. The password should be minimum 8 characters in length and should contain at least one special character, number and a letter.
    - **Phone Number:** This field takes the Employee’s Phone Number as an input. This field takes only digits as an input.
    - **Age:** This field takes the Employee’s age as an input. The age should be a legal working age.
    - **Aadhar Number:** This field takes the Employee’s Aadhar Number as an input.
    - **Employee ID:** This field takes the Employee’s ID as an input. This field takes alphanumeric inputs.
    - **Address:** This field takes the Employee’s Address as an input in a text box.
    - **Salary:** This field takes the Employee’s current salary as an input.
    1. **Submit:** On clicking submit button, submit the employee details entered and should add a new employee record to the company’s employee data.

Screens screenshot of a computer

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Fig 4.1

* 1. **Performance Analytics**
     1. **Company Performance:**

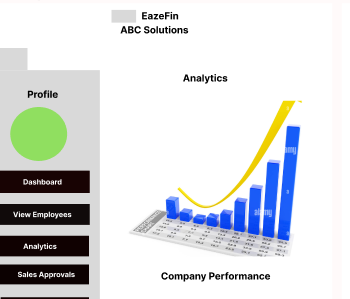


Fig 4.2.1

* The selection can be based on employee ID, department, or other relevant criteria.
* The company performance module of the project is designed to provide a visual representation of the company's profitability over time.
* The module consists of a graph that plots the cumulative profits of the company for every day of the month.
* The graph is reset at the beginning of each month to start a new cycle.
* The cumulative profits are calculated by summing up the individual profits entered by each employee and also taking into account other expenses for the company such as electricity bill, transport cost, etc.
* The graph helps to monitor the progress and performance of the company and identify areas of improvement or potential risks.

* + 1. **Employee Performance Analysis**

A graph with people and an arrow

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Fig 4.2.2

* **Employee Performance Metrics:**
* Display individual employee performance metrics for every month.
* The x-axis represents time (months), and the y-axis represents total profits.
* The graph shall dynamically update as new data becomes available.
* Each employee’s performance data shall be plotted as a separate line/bar on the graph.
* **Graphical representation:**
* Provide a graphical representation of performance trends.
* The upward arrow and increasing bar graph indicate improvement in performance and the decreasing bar graph shows a decline in employee performance.
* **Employee Selection:**
* Users (managers, administrators) shall be able to select specific employees view their performance graph.
* The selection can be based on employee ID, department, or other relevant criteria.

4.3 **Sales Approval:**

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Fig 1.4

* **Sales Approval Page:**

* All sales submissions made by different employees are listed.
* Each sales entry is associated with a unique employee identifier (e.g., Emp 1, Emp 2).
* A label is associated next to each sales entry indicating that these are “Sales” submissions.
* **Approval and Rejection:**
* Admins can approve or reject each sales submission individually.
* Icons are implemented (e.g., a green check mark for approval and a red cross for rejection) next to each sales entry.
* Clicking on the icons triggers the corresponding action (approve or reject).
* **UI:**
* Admins can easily distinguish between different sales entries and take appropriate actions.

**4.4 Expenses**

* The top section of the company dashboard contains:
* Logo and name (EazeFin) of the application.
* Name of the company
* Owner’s name
* On clicking the logo or EazeFin landing page opens.

* The left frame consists of a hamburger icon. By clicking this icon various options like dashboard, view employees, analytics, sales approval, expenses, transaction history, settings and logout pop up.

* The right frame displays the expense table which contains the value of the following :
* Capital amount – contains the company’s capital amount
* Salary
* Electricity
* Rent
* Others - contains two text boxes, one to enter the name and the other to add the amount of the expenses.
* Total expenses – holds the value of sum of all the above expenses

* The footer contains the copyrights information of the application.

**2.4 Transaction History**

2.4.1 The top section of the company dashboard contains:

* Logo and name (EazeFin) of the application.
* Name of the company
* Owner’s name

On clicking the logo or EazeFin landing page opens.

2.4.2 The left frame consists of a hamburger icon. By clicking this  icon various options like dashboard, view employees, analytics, sales approval, expenses, transaction history, settings and logout pop up.

2.4.3 The right frame displays the transaction history table which contains the amount and the status(sent/received) of the various fields like Capital amount, Profits, Electricity, Rent , etc.

2.4.4 The footer contains the copyrights information of the application.