

Requirement and User Interface Document

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I. Introduction:

The landscape of retail business is huge in our country. Every day the foot print of different business continues to grow as the economy scales up to meet consumer demands. Larger companies are able to drive their business by making powerful decisions based on data. Because numbers speak the tale, most business smaller than these huge corporations have a less competitive edge as they are not utilizing data to help grow their business. MYDATA focusses on this specific aspect to help fill the void.

A. Business Problem

- Low level to mid-level size companies are not capturing customer data. A lot of manual work is involved in managing inventory, payables, receivables. The following are the common challenges that these organizations face.
- Unable to define valuable customer base.
- Unable to track trends and identify purchase patterns.
- Unable to forecast supply by connecting customer related specific products that are high in demand.
- Access to digital marketing.
- Business predictability and Profit and Loss analysis.

B. Solution Overview

MYDATA will provide solution to small scale business owners and give them an advantage over the following aspects.

- Capturing customer data and hence prioritizing valued customers.
- Prioritize payables and receivables.
- Track profit and loss.
- Ability to analyses their data that can help make decisions to improve their business.
- Automate digital marketing via bulk SMS, Email blasting and IVRS.

C. Proactive and Anticipated needs

Organizations are increasingly under competitive pressure to not only acquire customers but also understand their needs to be able to optimize customer experience and develop long standing relationships. By sharing their data...relaxed privacy in its use, customers expect companies to know them. This will also help form relevant interactions and provide a seamless experience across all touch points.

D. Potential market for point of customers

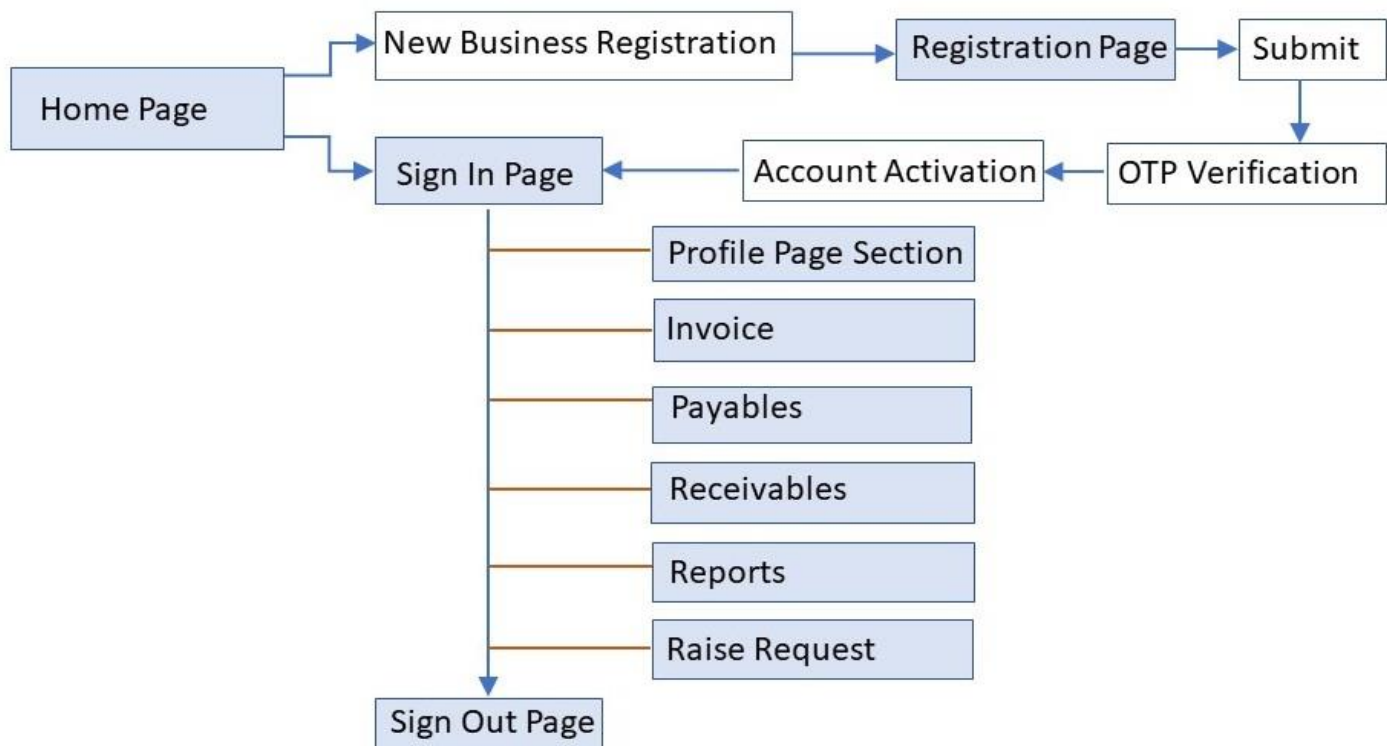
- | | |
|-----------------------------------|--------------------------|
| • Furniture and Electronics shops | • Lodges |
| • Paint | • Bakery and sweet shops |
| • Cement and Iron shops | • Chicken stalls |
| • Gift shops | • Fertilizer shops |
| • Book stores | • Vegetable shops |
| • Institute and training centers | • Flower decorations |
| • Hostels | • Catering Services |
| • Garment shops | • Travel agency |
| • Grocery stores | • Real estate |
| • Banquet hall | |

E. Glossary of terms referred in document

Term	Definition
Business Establishment (BE)	This is a commercial retail location of business open to public.
Business Owner (BO)/ Single Business Owner (SBO)	Is the one who owns or manages a business establishment and provides goods and services to public. This can also be the manager or person in charge who primarily interacts with the customer.
Multiple Business Owner (MBO)	Is the business owner who owns multiple business establishments of either same type or business or different type of business
Business Vendors (BV)	Are the people who provide inventory and other commercial services to the business establishment.
End Customers (EC)	Are the consumers who purchase goods and services from the business establishment owned by the business owner
Associate Customer (AC)	Customers who work for the organization
Most Valued Customer (MVC)	Customers who do a much higher volume of business with the business establishment than others
Repeated Customer (RC)	Customers who frequently revisit the business regardless of the volume of the business they make

II. Process Flow Steps

Below is the End to End Business process flow at a glance. The home page below refers to the SMYDATA home page from where the BO is able to login to their account. In some cases, home page can also be the main page of the BE's own website from where the BO can login and is redirected to their respective SMYDATA account.



III. New Registration

A. Registration Sign up

This is the first step in the BO sign up process. BO comes up to this page using the SIGN UP / REGISTER button located on the SMYDATA home page. A BO enters details shown as per the form and clicks SUBMIT.

Business Details:

- **Company Name** is the name of the registered BE.
- **Owner / Manager name** is the primary BO.
- **Mobile number** is the primary contact number used for account authentication and verification.
- **Password** is set up by BO as per their preference.
- **Email address** is optional
- **Business address** is the full mailing address and includes door number, street name, township, city district along with pin code
- **Website** is the details of any available websites and URL address existing for the business.
- **Business Category** is a drop-down feature where the BO can select from one of the following categories based on their type of business. Click [here](#) for the list.
- **Registration Information** is where the BO will enter the required details from valid form of registration documents. This is a drop-down category which will include Labor ID, PAN, TIN, Aadhar. BO will select one category and enter the details in the next field called 'Enter Details'.
- **Business Logo and Photos** is where the BO can upload their BE Logo and photos that they wish to portray to public.

Note:

- All fields are mandatory except **EMAIL ADDRESS** which is made optional.
- **Mobile number:** Logic retroactively checks for existing registered phone numbers in the form of predictive query and invalidate the entry based on existing ones.
- **Password:** Set up password logic as per recommended combination standards (letters, numbers, special character etc.)
- **SUBMIT:** Button generates an OTP sent as text message to the mobile number that BO entered on the sign-up form.

New user sign up

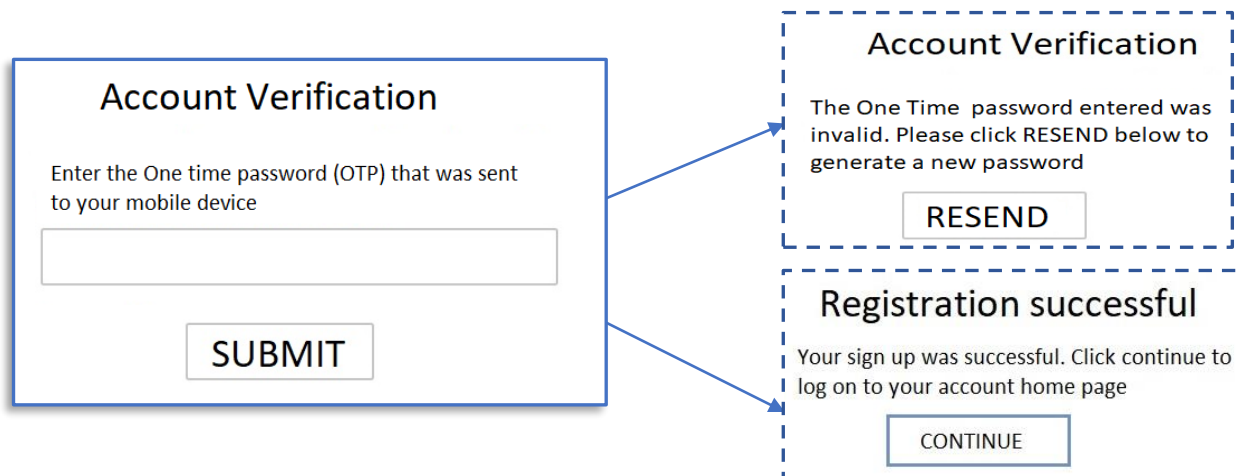
Owner / Manager Name	<input type="text"/>	<input type="text"/>
Business Name	<input type="text"/>	
Mobile Number	<input type="text"/>	
Password	<input type="password"/>	
Email Address	<input type="text"/>	
Business Address	<input type="text"/>	
Pin code	<input type="text"/>	<input type="button" value="Get Location"/>
Select Registration/ID Type	<input style="border: 1px solid #ccc;" type="text"/> ▼	
Enter Details	<input type="text"/>	
Attach Registration Documents	<input style="border: 1px solid #ccc;" type="text"/> 	
<input type="button" value="Submit"/>		

B. Account Verification via OTP

BO enters the OTP received on the mobile device and clicks **SUBMIT**.

Note: Once user clicks on SUBMIT and if OTP verification is successful the data is captured and a unique id is generated in the back end. An email notification is automatically sent to the backend team.

If the BO did not receive the code or if it was invalid/expired, the code can be requested using the resend option.



C. Sign in

Following successful registration notification, the BO can login to their account using the mobile number and password they used during sign up process.

Description of fields:

Mobile Number: Registered mobile number of BO

Password: The set password that was established during sign up process.

Remember my ID: This feature will save the user id from the trusted system it is being used requiring the user to simply enter the password for logging in the account.

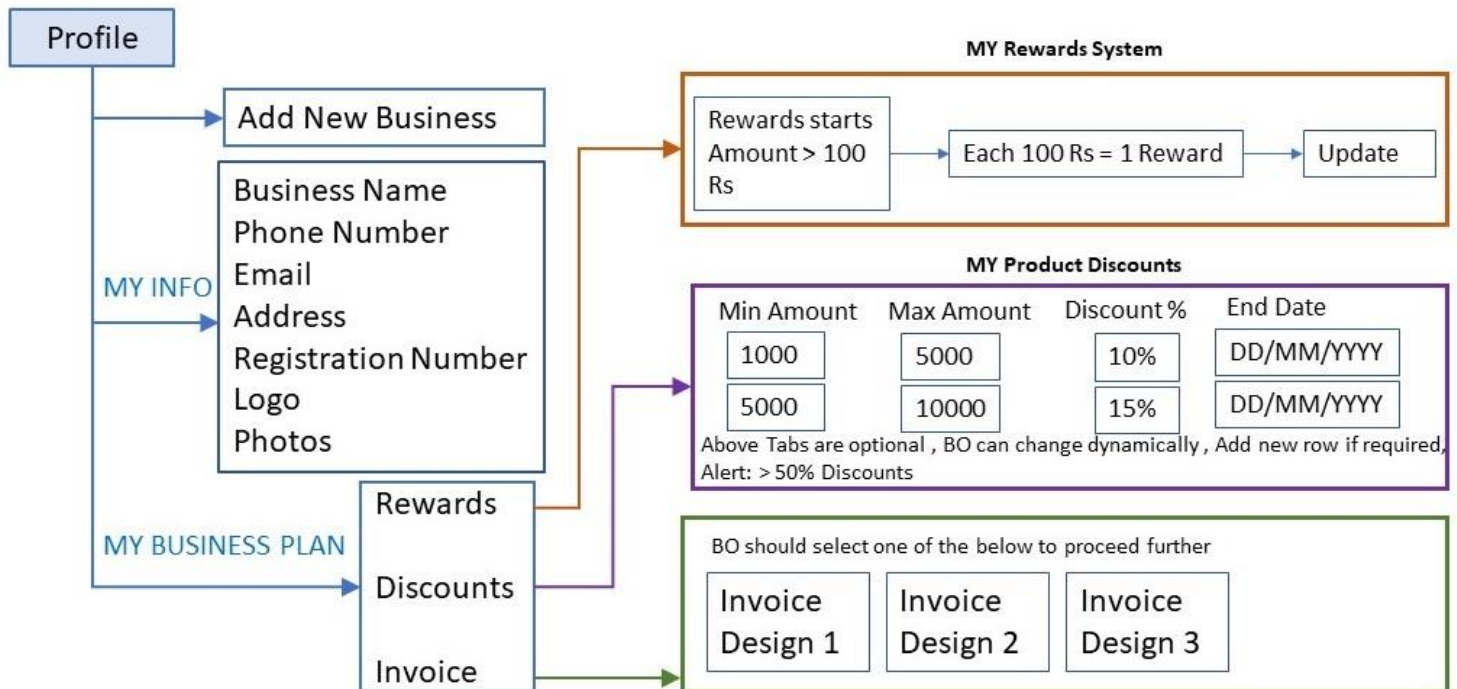
Forgot my password: In cases where a BO forgets or is unable to login, they can use this link to request an OTP sent to their registered mobile number. Once OTP is entered the BO can set a new password.

The image shows a "Sign in" form. At the top is the title "Sign in". Below it is the label "Mobile Number" followed by a text input field. Underneath is the label "Password" followed by another text input field. Below the password field is a checkbox labeled "Remember my user ID". A blue button with a lock icon and the text "Sign in" is positioned below the checkbox. At the bottom of the form, there is a line of text: "By clicking Sign In, you agree to our [License Agreement](#)." Below this are two more links: "I forgot my user ID or Password" and "New to SMYDATA ? Sign up".

IV. Account Home Page

A. My Profile

1. My Profile Flow Chart



2. Functionality inside My Profile:

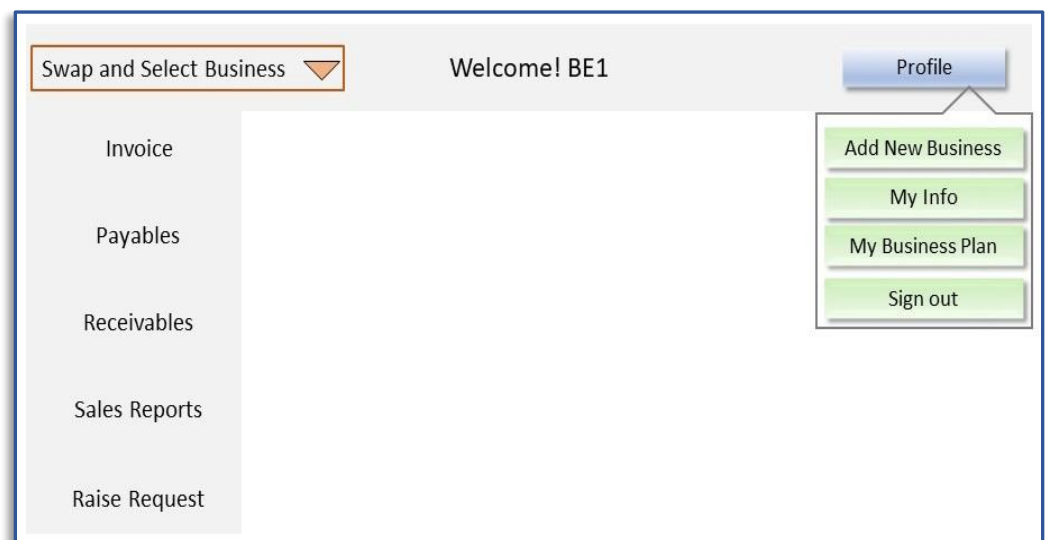
Here in this section the BO can update their information regarding business and is also able to dynamically customize the logic behind rewards points in an easy to use interface. My Profile section consists of 3 sections called ADD NEW BUSINESS, MY INFO and MY BUSINESS PLAN. The functionality serves both SBO and MBO.

In case of a SBO, upon login they can directly view their account page related to their BE.

In case of MBO, upon login the BO should select one business from the dropdown list. This enables access to the specific related information. This dropdown will exist as default in all the pages in INVOICE, PAYABLES, RECEIVABLES, SALES DASHBOARDS, RAISE REQUEST. At any point, it will allow the BO to switch and view data as required.

Note: The dropdown will appear only if the BO has registered more than one business. The process to add business is explained in the next section.

The image shows the default view of account homepage under a MBO login scenario.



3. Views in My Profile

a) Add New Business

- BO can add multiple businesses after initial login, under MY PROFILE and then by selecting ADD NEW BUSINESS.
- BO will need to fill in the details as required on the form and click SUBMIT.
- Upon clicking SUBMIT and OTP will be generated to the registered mobile.
- BO needs to enter the OTP to activate New Business under one single account.

Note: Based on business category, after login the UI and functionality will change.

b) My Info

- A SBO should be able to modify or update the business information and upload photos specific to their BE.
- A MBO will additionally be able to switch between their registered BE's and update the business information as needed.
- The image shows the view when clicked on **My Info** under **Profile**.
- It contains fields where in BO can enter and update their profile information
- They can also upload Inventory photos or store photos using the Business Logo/Photos upload field. A pop up will appear where they can assign the name as well.
- They can update the registration documents by uploading in case they are near expiration.
- Once done they can save by clicking **Save Changes**.

c) My Business Plan

Under this view, A SBO or MBO will have the capability to set their rewards and discounts and pick invoice design templates. This consists of 3 views.

- My Rewards System
- My Product Discounts
- Invoice Design Samples

My Rewards System:

- BO can make rewards optional to business and they can change/add/disable new rewards dynamically.
- BO can set amount if customer invoice is greater than set rewards, then customer will be eligible for the rewards.
- Reward Amount: Here the value of points against cash value is defined by BO
- Fixed 1 Reward: This will be fixed to 1 Reward.
- End Date: SBO can set End Date to rewards. From that date rewards will not be given on purchase. Note: Redemption of rewards date is different.
- Additionally, MBO can reuse existing rewards system of one business to other different businesses.
- With an option of Apply to: from dropdown, they can select multiple businesses and apply. So same rewards can be applied to selected business.
- Here the BO can add new discounts based on their requirement that they can offer to EC.
- Both the Amount and Discount % are free form fields.
- The logic works in the manner if for example the purchase amount is more than 20000 then automatically a 5% discount is applied to the Invoice.
- The screen also contains enable/disable switch where in the BO can activate or deactivate a specific discount offering
- Likewise, the BO can also add new discounts by using the Add New button.
- Sign up bonus rewards can be used to give points to a new customer.
- Reward points bonus range can be used to define a purchase amount price range to give bonus points for more loyal customers.

My Product Discounts:

- BO can make discounts optional to their business and can change /add/disable new discounts dynamically.
- BO is able to set minimum amount, maximum amount and percentage of discounts. A BO can add multiple discounts by clicking on **Add New**. Based on

customer invoice, the discounts get applied. A BO can set end date to the discounts.

Invoice Design Samples:

- SBO must select one type of invoice out of three.
- The selected invoice will be displayed in the **INVOICE** page.
- Note: MBO can select different invoice designs to their different businesses.
- This view contains 3 preset design templates.
- BO can select one and save by using the **Save Changes** button.

The screenshot shows a web interface titled 'MY BUSINESS PLAN'. On the left is a sidebar menu with links: Invoice, Payables, Receivables, Sales Reports, and Raise Request. The main area has tabs for Rewards, Discounts, and Invoice (which is selected). Below the Invoice tab, there are two placeholder boxes labeled 'Invoice Design 1' and 'Invoice Design 2'. At the bottom right of the main area is a 'Save Changes' button. On the far right, there is a 'Profile' dropdown menu with options: Add New Business, My Info, My Business Plan (highlighted with a red border), and Sign out. At the top left, there is a 'Swap and Select Business' dropdown menu. The top right corner says 'Welcome! BE1'.

Invoice 1

- The **Create New Invoice** button will create a new invoice below it for the BO to conduct the transaction.
- This type of layout is where the BO can select the item from dropdown and an item name populates in the new invoice under **Item Name**.
- The **Quantity** and **Amount** are manually entered.
- The **Enter Discount** field is where a discount value can be entered by BO such as for example 5% or 10%. This discount is on top of the available discounts that are applied dynamically from the My Business Plan section.
- The **Total** is dynamically calculated and displayed with each entered price of transaction.
- **Submit** button saves the final transaction and generates or prints a normal bill or invoice to be given to customer.
- **Generate GST Invoice** will save the final transaction and generates or prints a GST bill or invoice to be given to customer. The logic for GST is applied in backend depending on the nature of business.

The screenshot shows an 'Invoice 1' form. At the top left, customer details are listed: Sam Smith, 9876512345, email@email.com, and Address: Mycity123. To the right of these details is a logo and the text 'GOLD TIER'. On the far right, there are two boxes: 'Total BV' with the value 214562 and 'Total Points' with the value 15432. Below the customer details is a table with four columns: Item Name, Quantity, Rate, and Total Amount. The table has three empty rows for data entry. Below the table, there is a 'Sub Total:' label and a 'Discounts:' label. To the left of these labels is an 'Enter Discount' field with a dropdown menu showing 'Amount' and '% Percent'. Below the 'Enter Discount' field is a 'Total Amount:' label. At the bottom of the form, there is a checkbox labeled 'Redeem Points' which is checked. To the right of the checkbox are 'Credit' and 'Submit' buttons. At the very bottom, there are two large buttons: 'Submit' and 'Generate GST Invoice'.

Invoice 2

- The **Create New Invoice** button will create a new invoice below it for the BO to conduct the transaction.
- When BO starts the sale transaction they can click on the images of the items. The example in image on right is that of a furniture shop.
- Once an image is clicked a pop up appears with **Item Name**, **Quantity** and **Amount** fields and automatically creates a new invoice in background.
- In the pop up the **Item Name** is fixed and is associated with the image. BO can upload the images of inventory and add a name to associate it with the image. Those images appear in the horizontal panoramic section for the BO to be able to scroll.
- The **Quantity** field has dual feature. BO can type the quantity and select value from dropdown till 10.
- The **Amount** needs to be manually entered.
- BO clicks **OK** and an entry is made in the invoice.
- Likewise, the BO repeats the process to record the sale transaction of items they are selling.
- The **Enter Discount** field is where a discount value can be entered by BO such as for example 5% or 10%. This discount is on top of the available discounts that are applied dynamically from the My Business Plan section.
- The **Total** is dynamically calculated and displayed with each entered price of transaction.
- **Submit** button saves the final transaction and generates or prints a normal bill or invoice to be given to customer.
- **Generate GST Invoice** will save the final transaction and generates or prints a GST bill or invoice to be given to customer. The logic for GST is applied in backend depending on the nature of business.

Sam Smith

9876512345

email@email.com

Address: Mycity123



GOLD TIER

Total business in last 12 months in amount

214562

Total Points

15432

Redeem Points

<






>


Previous Invoices for Sam







ADD ITEM

Date	Invoice Number		
dd/mm/yyyy	#2102	View	Reprint
dd/mm/yyyy	#2103	View	Reprint
dd/mm/yyyy	#2042	View	Reprint
dd/mm/yyyy	#2217	View	Reprint
dd/mm/yyyy	#2313	View	Reprint
dd/mm/yyyy	#2414	View	Reprint

Sam Smith
9876512345
email@email.com
Address: Mycity123

 GOLD TIER

Total Points: Redeem Points








Item Name	Quantity	Amount

Enter Discount:

Total:

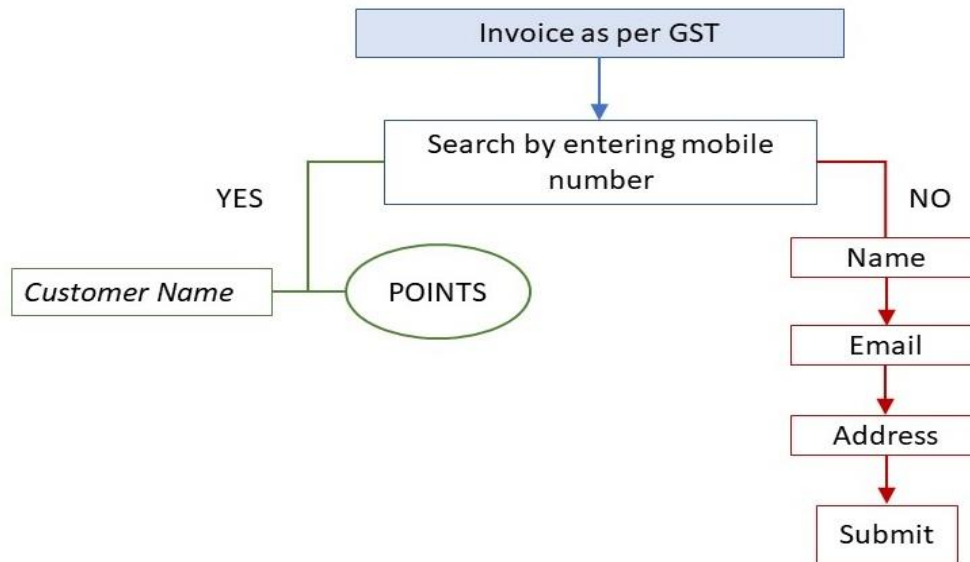
Item **Quantity** **Amount**

Chair 

 ADD ITEM

B. Invoice

1. Invoice Flow Chart



2. Functionality

The important driving factor in this section would be the customer phone number that ties all the records and transactions to it. Using this screen, a BO can:

- Look up reward points based on phone number
- Generate purchase invoices
- Register a new EC.
- View or redeem points for the EC.

3. Views

There are 3 different views that BO will interact with depending on the requirement.

- View 1: Default view
- View 2: Customer number **not available**
- View 3: Customer number **is available**

a) View 1: Default view

- This is the default view when BO comes to the Invoice tab.
- A BO can search for EC by entering their phone number in **Search by mobile number field**.
- The page dynamically creates fields based on search result.
- Also in this view most recent transactions made in the current day are displayed.
- The latest transaction is showed on top followed by the rest.
- The BO can view for quick reference and reprint the invoice if necessary.

The screenshot shows the 'INVOICE as per GST' interface. At the top, there is a 'Swap and Select Business' dropdown and a 'Profile' button. On the left, a sidebar contains navigation links: 'Invoice' (highlighted), 'Payables', 'Receivables', 'Sales Reports', and 'Raise Request'. The main area features a 'Search by mobile number' input field. Below this, a section titled 'RECENT CUSTOMER PURCHASE INVOICES' displays a table of recent transactions.

DATE	INVOICE	PURCHASE AMT	
dd/mm/yyyy	Invoice # 6532	5000	REPRINT
dd/mm/yyyy	Invoice # 6533	6000	REPRINT
dd/mm/yyyy	Invoice # 6534	7000	REPRINT
dd/mm/yyyy	Invoice # 6535	14000	REPRINT
dd/mm/yyyy	Invoice # 6536	18000	REPRINT
dd/mm/yyyy	Invoice # 6537	19350	REPRINT

b) View 2: Customer number not available

- BO enters customer number in and customer is not found.
- This automatically creates 3 fields **Name, Email and Address.**
- This implies that the customer data is not already in the system and creates an opportunity for the BO to track this customer specific data going forward.
- The EC provides the details such as their **Name, Email and Address.**
- BO enters the details and clicks on **Create Account.**
- This creates an account linked to this EC's mobile number and can be used for future transactions.

c) View 3: Customer number is available

- BO enters the mobile number of EC.
- If the mobile number is found in system then this is the view that appears.
- The view shows **Total Points** for EC along with the option to redeem.
- It also displays the EC rewards tier they are in currently.
- It also displays recent invoices associated with the specific EC
- BO can generate invoices for the purchase transactions
- While in an active invoice The BO can redeem points for EC, which will reduce the total amount based on the logic of points converting to currency.
- The screen shots displayed here are of the **Invoice1** and **Invoice 2** types.
- The description of both is explained in the previous section [here](#).

Date	Invoice Number	View	Reprint
dd/mm/yyyy	#2102	View	Reprint
dd/mm/yyyy	#2103	View	Reprint
dd/mm/yyyy	#2042	View	Reprint
dd/mm/yyyy	#2217	View	Reprint
dd/mm/yyyy	#2313	View	Reprint
dd/mm/yyyy	#2414	View	Reprint

Item Name	Quantity	Amount
Chair	2	

Swap and Select Business

INVOICE as per GST

Profile

Invoice

Sam Smith
9876512345
email@email.com
Address: Mycity123

GOLD TIER

Total BV 214562
Total Points 15432

Redeem Points

Payables

Receivables

Sales Reports

Raise Request

Previous

Enter Item Name

Upload Item Image

OK

Cancel

+ ADD ITEM

Date	Invoice Number	View	Reprint
dd/mm/yyyy	#2102	View	Reprint
dd/mm/yyyy	#2103	View	Reprint
dd/mm/yyyy	#2042	View	Reprint
dd/mm/yyyy	#2217	View	Reprint
dd/mm/yyyy	#2313	View	Reprint
dd/mm/yyyy	#2414	View	Reprint

In **Invoice 2** type, when clicked on **Add Item** a pop up appears where in a BO can add a new item name under **Enter Item Name** and upload an image for the respective item.

Swap and Select Business

INVOICE as per GST

Profile

Invoice

Sam Smith
9876512345
email@email.com
Address: Mycity123

GOLD TIER

Total BV 214562
Total Points 15432

Redeem Points

Payables

Receivables

Sales Reports

Raise Request

Item Name	Quantity	Rate	Total Amount

Sub Total:
Discounts:

Enter Discount

Amount % Percent

Total Amount:

☒ Redeem Points

Credit

Submit

Generate GST Invoice

In **Invoice 1** type, the **Add Item** is present in the drop down where in a BO can add a new item name under **Enter New Item Name**.



BRONZE TIER



SILVER TIER



GOLD TIER

Customer Rewards Tier Levels:

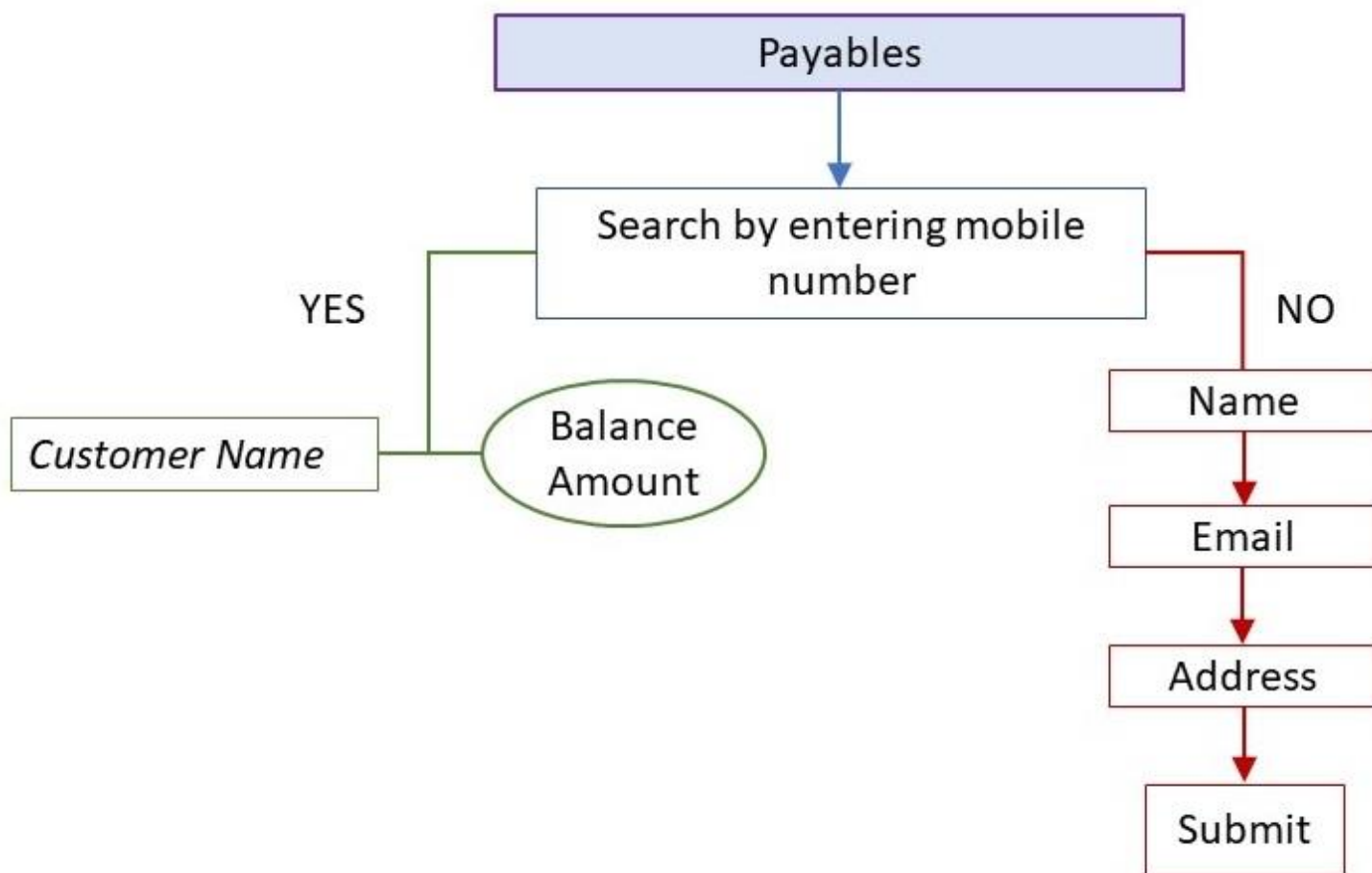
The customers are divided into the following tiers
Gold Tier: Most valued customers who have done most business in the last 12 months

Silver Tier: Repeated customers who are recurring customers regardless of volume business

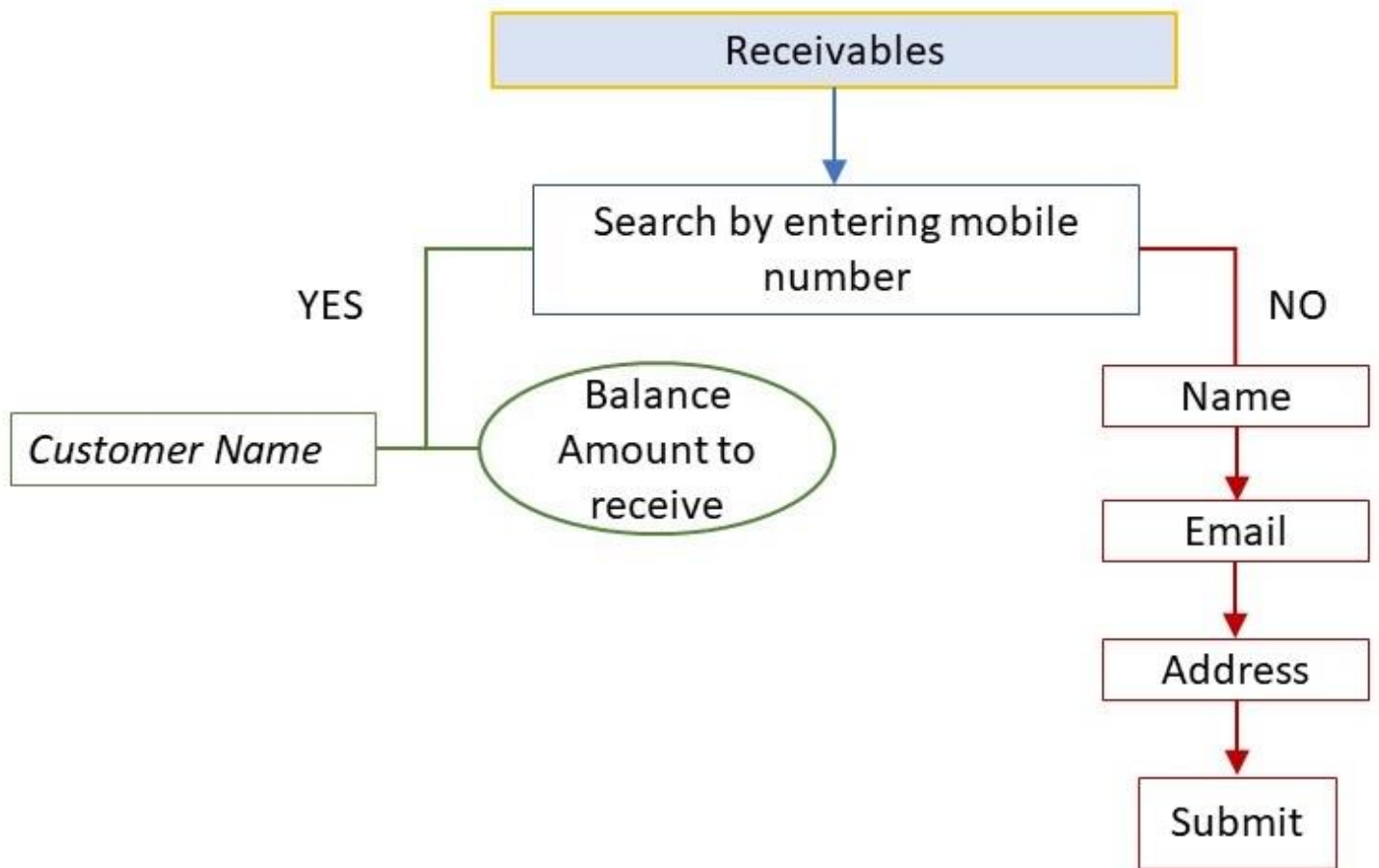
Bronze Tier: Is for the entry level customers.

Each of the categories have a distinct assigned symbol. These categories get assigned to the based on the logic that defines the above-mentioned categories. The symbol appears next to the name of the EC when they are looked up by their phone numbers.

C. Payables



D. Receivables



E. Sales Dashboard

F. Raise ticket

This is the last section in the account home page. The BO uses this page to raise a request with the SMYDATA service team. This is used by BO to send IVRS or email blast to the customers regarding promotions.

Raise a Request

Subject

Detail Description

Submit