# Business Requirements Document (BRD)

## 1. Document Control

Project Title: BA Project RetailERP OrderInventory

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## 2. Introduction

### ❖ Purpose of the Document:

This Business Requirements Document (BRD) outlines the essential functional and non-functional requirements for the Retail ERP system focused on order and inventory management. It acts as a reference for all stakeholders, including developers and testers, to ensure alignment on project objectives, boundaries, and expected outcomes.

### ❖ Scope of the Project:

The scope of this project covers the automation of key retail operations such as inventory monitoring, processing of sales orders, and generation of customer invoices for SSW Retail. Key features include:

- Tracking inventory levels in real time
- Facilitating online order placement and monitoring order status
- Automatically creating invoices and handling billing
- Generating alerts for low stock situations

Features excluded from this project scope are CRM system integration, tax management across multiple locations, and detailed reporting capabilities.

❖ **Intended Audience:**

This document is intended for:

- Business sponsors and key stakeholders
- Business analysts and project coordinators
- Software development and quality assurance teams
- End users and department leaders responsible for retail operations

## 3. Business Objectives

The core aim of this project is to enhance business performance by increasing efficiency, minimizing manual errors, and improving customer satisfaction through the deployment of an ERP-driven order and inventory management solution. The main objectives are as follows:

❖ **Automate Inventory Processes**

- Implement real-time stock monitoring to avoid product shortages or overstock situations.
- Initiate automatic stock replenishment when inventory falls below defined thresholds.

❖ **Optimize Order Management**

- Convert manual order handling into a digital process to boost accuracy and processing speed.
- Allow customers and internal teams to view order status instantly through the system.

❖ **Improve Billing and Invoicing Operations**

- Set up automated invoice generation and email delivery upon order confirmation.
- Enhance billing precision and reduce administrative workload.

❖ **Minimize Manual Work and Errors**

- Replace spreadsheet-based operations with system-driven processes.
- Lower the risk of human error by automating routine inventory and order tasks.

❖ **Support Better Decision-Making with Real-Time Data**

- Deliver visual dashboards and reports for actionable inventory and sales insights.
- Equip management with timely data to support purchasing and operational strategies.

## 4. Background / Problem Statement

SSW Retail is an expanding medium-sized retailer operating through both physical stores and an online platform. At present, the company depends heavily on manual workflows and disconnected tools such as spreadsheets, email communication, and handwritten records to handle inventory, process customer orders, and manage invoicing activities.

These outdated systems have resulted in several operational inefficiencies, including:

- **Unreliable stock information**, causing frequent shortages or overstock situations
- **Sluggish order processing**, due to the absence of a real-time tracking mechanism
- **Manual invoice generation**, which leads to frequent billing mistakes
- **Lack of real-time business insights**, which hinders proactive decision-making
- **Over-reliance on manual effort**, limiting the company's ability to scale efficiently

To overcome these challenges, SSW Retail needs a unified ERP solution that automates core operations, minimizes manual intervention, and delivers up-to-date data to support informed decision-making. The goal of this project is to replace existing fragmented processes with a centralized system for inventory control, order management, and billing.

### 5. Project Scope

#### ❖ In Scope:

This project will cover the development and implementation of the following key features and functionalities:

- Live inventory tracking to monitor stock levels in real time
- Automated purchase orders triggered when stock falls below a defined threshold
- Functionality for customers to place orders and view their order status
- System-generated invoices sent automatically upon order confirmation
- Role-based access control for different user types (e.g., Administrator, Inventory Staff, Sales Team)
- A basic dashboard providing an overview of sales and inventory metrics
- Notification system to alert users of low stock or unfulfilled orders.

#### ❖ Out of Scope:

The following areas are not part of this project's current scope:

- CRM system integration or marketing automation tools
- Tax handling across multiple currencies or international locations
- Complex data analytics or advanced reporting capabilities
- Development of mobile applications
- Modules for managing supplier relationships
- Direct integration with shipping or logistics service providers

## 6. Business Requirements

| ID | Requirement Description |
|----|------------------------|
| **BR1** | The system shall track inventory levels in real time across all product categories. |
| **BR2** | The system shall automatically generate a purchase order when stock falls below a set threshold. |
| **BR3** | Customers shall be able to place orders through the online platform. |
| **BR4** | The system shall provide real-time order tracking status to both customers and staff. |
| **BR5** | The system shall generate an invoice automatically upon order confirmation. |
| **BR6** | Admin users shall be able to add, edit, and deactivate product listings. |
| **BR7** | The system shall send notifications for low stock levels and pending orders. |
| **BR8** | The system shall provide a dashboard summarizing inventory, sales, and order status. |

## 7. Functional Requirements

| ID | Functional Requirement Description |
|----|-----------------------------------|
| **FR1** | The system shall allow authorized users to log in and manage their access based on roles. |
| **FR2** | The system shall enable users to add, update, or remove inventory items. |
| **FR3** | The system shall automatically calculate available stock after each sale or restock. |
| **FR4** | The system shall allow customers to create, view, and cancel online orders. |
| **FR5** | The system shall generate and send invoices automatically upon order confirmation. |
| **FR6** | The system shall display order status updates in real time (e.g., pending, shipped, delivered). |
| **FR7** | The system shall allow users to configure minimum stock thresholds for each product. |
| **FR8** | The system shall trigger automatic reordering when inventory falls below the threshold. |
| **FR9** | The system shall provide downloadable reports for inventory, sales, and billing. |
| **FR10** | The system shall notify relevant users via email or dashboard alerts for key events. |

## 8. Non-Functional Requirements

| ID | Non-Functional Requirement Description |
|---|---|
| **NFR1** | The system shall ensure 99.9% availability during business hours (8 AM to 5 PM). |
| **NFR2** | The system shall respond to user actions within 3 seconds under normal load. |
| **NFR3** | The system shall comply with relevant data security standards to protect customer and financial data. |
| **NFR4** | The system shall support role-based access control to restrict unauthorized users. |
| **NFR5** | The system shall be scalable to handle a 50% increase in transaction volume during peak periods. |
| **NFR6** | The system shall maintain audit logs of all critical user actions and transactions. |
| **NFR7** | The system shall be accessible via modern web browsers on desktop and mobile devices. |
| **NFR8** | The system shall support backup and recovery procedures to prevent data loss. |

## 9. Assumptions and Constraints

### ❖ Assumptions:

- Users will be provided with sufficient training on the ERP system before it goes live.
- Stable internet access will be maintained throughout system usage.
- The current hardware setup will adequately support the ERP application.
- Stakeholders are expected to deliver prompt feedback and approvals during each project stage.
- Accurate and complete data for migration, such as inventory records, will be available.

### ❖ Constraints:

- The rollout will initially cover only five retail locations.
- This project phase will not include integration with third-party CRM or logistics platforms.
- Limitations in budget and schedule will restrict extensive customization and additional features.
- The ERP system must adhere to the organization's existing IT security policies.
- Development of a mobile application is outside the scope of this implementation.

## 10. Timeline / Milestones

| Task | 1w | 2w | 3w | 4w | 5w | 6w | 7w | 8w | 9w | 10w | 11w | 12w | 13 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Project Kickoff | ■ | | | | | | | | | | | | |
| Requirements Gathering | ■ | | | | | | | | | | | | |
| BRD Finalization | ■ | | | | | | | | | | | | |
| Use Case & Process Modeling | ■ | | | | | | | | | | | | |
| System Design Approval | ■ | | | | | | | | | | | | |
| Development | ■ | ■ | ■ | | | | | | | | | | |
| Testing | ■ | ■ | | | | | | | | | | | |
| User Training | ■ | | | | | | | | | | | | |
| Go-Live | ■ | | | | | | | | | | | | |
| Project Closure | ■ | | | | | | | | | | | | |

## 11. Approval

| Name | Role | Signature | Date |
|---|---|---|---|
| Mr. Nimal Perera | Project Sponsor | ____Nimal_____ | _____19.06.25_____ |
| Ms. Saumya Weerasingha | Business Analyst | ____Saumya_____ | _____19.06.25_____ |
| Mr. Kasun Jayasinghe | Inventory Manager | ____Kasun_____ | _____19.06.25_____ |
| ERP Vendor Representative | Solution Provider | ____Dilani_____ | _____19.06.25____ |