

Red = Sample Data

Green = Complete

Gray = Completion Confirmed

Black = To Be Completed

Yellow = Further Instruction Needed

Login:

- Follow the colors from our original <http://www.assetenterprises.com/testing/> as much as possible. These are our company colors and will be used throughout the software.
 - Remember which users have checked the box for "I agree to the terms of service" and prevent them from having to check this box ever again even if their MAC address or IP address changes.
 - Log the details of each user or login attempt. If a user is visiting for the first time and already has a userid and password we need to request that they change their password to something more secure.
 - Remember user session as long as the users IP and MAC address have not changed. If their IP address changes, notify them that "Your IP address has changed since your last login, please verify your credentials." If their MAC address changes, notify them that "You are logging in from a device that we do not recognize. Please verify your credentials." If a user is using a MAC address that we have already remembered for another user, the original user should be remembered to continue bypassing the login screen.
 - Verify that this screen is responsive for all screen sizes including small mobile devices. We cannot check the device screen size and then process the page. We must utilize the responsive screen queries that bootstrap is based on.
 - [View Screenshot List Of Updates](#)
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Overview:

- This will be the last admin screen we build. It requires data from all other tables.
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Sales Orders:

- Overview
 - The following details will be shown on this screen:
 - Customer logo. Icon size.
 - Generated Sales Order Number: CUS-123456 or CUS03061601
 - Total quantity of items on the order: 30
 - An overview of the items on the order (we might move this to be inside of a popover): (10)TOS 4900-E85 Wide Iron Grey 4GB RAM/ 2x 500GB HDD (Raid)/ DVDRW with Windows 7 Installed (PC & Mainboard), (10)IBM Dist.VGA 3.8M 51J1412 (Parts Acquisition), (5)Vendor part # 99Y1467 - Cable, serial port (blue connectors) (Development), (5)Vendor part # 99Y1526 - Cable, serial port (black connectors) (Development)
 - Ship-by date: 03/08/16
 - All departments involved (this could be labeled at the end of each item in the popover listed above.: PC & Mainboard, Parts Acquisition, Development
 - General notes for the order: Please use samples from 785 terminals to build the serial cables.
 - Status of the order, this will be a calculation of items marked ready to ship and items that have been requested for purchasing, once the purchased items have been received the status will change: 90% Complete. Waiting on Purchased Parts. OR 90% Complete. Purchased Parts have arrived!
 - The following options are needed for admin users on this screen:
 - [View Sample Icons](#)
 - **View Pick List** - This is just a simple list of all items that need to be picked for our parts supervisor to mark each item as "Picked" status. (Image Thumbnail, AMS Part Number, Manufacturer & Description, Qty (this is a sum of the items on this order), Available In-Stock Qty (this is a sum of all instock items for this model)
 - For **Purchase OrderType** - Reorder Button with Glyphicon (this will create a purchase (for the purchasing page) that will allow them to specify a quantity to order.), Pick Button with Glyphicon) If it is a serialized item (check models.serialized) then we will have to enter the serial numbers as we

pick them. Be aware, sometimes we have to pick quantity 250 or more of one line item and we have to scan the serial numbers for all of them into our system.

- For **Repair OrderType** - Pick button will open options to pick all items on that sales order line or one item from that sales order line at a time. These are usually serialized items. If it is a serialized item (check models.serialized) then we will have to enter the serial numbers as we pick them. Be aware, sometimes we have to pick quantity 250 or more of one line item and we have to scan the serial numbers for all of them into our system. After items have their serial numbers entered and they are picked then we will display a Repair button. The Repair button will open options to choose problems with the unit. These problems and resolutions will need to be saved in a new table called "issues_resolutions" and be associated with that model.id. Then all of the available issues and resolutions will be shown as options for that model with the option to add a new problem, resolution, and part used to repair it.. the issues_resolutions table will probably need "model, problem, resolution, partused". After problems have been chosen for that item we will be able to mark the item "Ready". "Ready" items will be located on the shipping page.
 - For **Integration OrderType** - This will be similar to purchases. Instead of a "Reorder" button, we should have a "Send Notification" button that will email the customer an alert of low quantity items that they need to replenish. This will have a Pick Button also. If it is a serialized item (check models.serialized) then we will have to enter the serial numbers as we pick them. Be aware, sometimes we have to pick quantity 250 or more of one line item and we have to scan the serial numbers for all of them into our system.
 - For **Warehousing OrderType** -
 - **View** - This will include all of the details of the order in a larger format and also include all of the options for the order: Check Stock, Start, Edit, & Delete.
 - **Edit** - Basic editing of the order. Items that have already been "Picked" can not be edited.
 - **Delete** - This option is only available for orders that have not been started. If an order has been started and has been cancelled we must display a list of "Picked" items that must be returned to stock before allowing the deletion of the order. Deleting an order must require confirmation by entering your password.
 - Create An Order:
 - Remove the secondary bootstrap "well" from the additional details section so that the page is uniform.
 - Move "Request An Item" button to be attached to each "Description" field so multiple requests can be made on one order. Also have the button only say "?" with a popover that says "Having trouble finding your item? Request help.[added as title for request link button].
 - For "Request An Item" add options for "Customers.name Part Number:" and "Customers.name Description:" that will be added to the additional "partnumbers" table and reference our new model id.
 - Swap "Shipment Type" and "Location", then swap "Location" with "Order Type". So the tab order will be Customer, location, order type, shipping method, ship-by date, end-user order number, customer order number, notes, then add items.
 - Customers live search is correct but if you tab to the next field it should choose the highlighted option automatically.
 - Locations must be based on the customer that is chosen. Example: only show Ahold locations for Ahold customer. If no customer has been chosen, show "You must choose a customer.". Tabbing to the next field should automatically choose the highlighted option.
 - Add
 - Shipment Method will need additional shipping options once we integrate UPS & Fedex API's. We will have default account numbers and shipping methods for each customer. As well as, default shipping account numbers and methods for the AMS system itself, which is the Asset Enterprises account info.
 - Upload A File - This will allow us to save the customers PDF file to the order and preview it beside our order form while we create the order. This option is part of the initial launch. To keep us on track, LATER we need to revisit this option and possibly upload their file and import the information automatically into our new sales order. The goal will be to see our new order and their PDF side by side to confirm that it imported correctly. Each of our customers has a different standard PDF that they send... so we will either have to create an "importing template" for each customer or get even smarter and figure out how to recognize what data goes where.
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Purchasing:

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Receiving:

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In Progress:

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Shipping:

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Billing:

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Inventory:

- The columns here will be listed as follows:
 - **Thumbnail Image** - This will need to have the option to click and open a large version of the image.
 - **Part Number** - This should have a popover to view all other customer part numbers and descriptions associated with this model currently from the partnumbers table.
 - **Model** - This will be the manufacturer name and model description together.
 - **Inventory** - This will show an icon with the total amount of this item(in stock, picked, in progress, and ready to ship) and will offer a popover with a list of all owners(Asset or Customer owned) and the areas that this part is in stock or the status of the part if it is not still “in stock”, example:
 - (43) Asset Enterprises (Main Warehouse)
 - (3) Asset Enterprises (Picked - Cart1)
 - (1) Asset Enterprises (In Progress - Mike H.)
 - (214) Manhattan Project (Staging Warehouse)
 - (12) Ahold (Parts Warehouse)
 - **Reorder** - This will create a purchase order for the “Purchasing” tab. These are items that our purchasing department needs to find and buy for us to fulfil orders or replenish stock.

User Accounts:

- Add “View Log” as a main option and also as a specific user option. With location details, ip, mac, etc.
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Customers:

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Analytics:

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Misc Notes:

- Every form submission must be logged giving us access to view which user and the date and time an: order was created, order was started, items was picked, user started working on an item, item or order was deleted, item was purchased, item was received, item has been shipped, order has been shipped... etc.
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AMS Settings:

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Navigation:
