ERP System Revision Documentation

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Intent of the Document

This document outlines a client-requested revision to the **Sales Order (SO)** module in the ERP system.
The purpose is to explain the functional changes required, how they impact the workflow, and the updated development timeline.
It is written for ERP stakeholders who understand system functionality but are not necessarily familiar with technical implementation details.

Terminologies

- **SO (Sales Order):** A record capturing client orders, products, and associated details.
- **OBOM (Ordered Bill of Materials):** Generated list of materials required for fulfilling a product in an SO.
- **SBOM (Standard Bill of Materials):** Predefined structure of materials used for reference.
- **PR (Purchase Requisition):** Internal request document for procurement of items.

Summary of Revision Request

Currently, the **Sales Order module** allows adding **only one product** per SO, and always generates an **OBOM** for that product.
The client has requested enhancements to support new **types of items** within SO, changing how OBOM and PR behave:

New Item Types

1. **Product** → *(Existing behaviour — unchanged)*
2. **Spare** → Two subcategories:
    - **Normal Materials** → directly go to **PR**, **no OBOM**.
    - **Fabricated Materials** →
        - If present in **SBOM** as semi-finished → **OBOM is created**.
        - If not present in **SBOM** → treated as **normal spare** → **no OBOM**.

3. **Maintenance** → Items **bypass OBOM** and directly move to **PR**.

Additionally:

- Only **one Product** can be added per SO (no change).
- Multiple **Spare** and **Maintenance** items **can** be added per SO.

High-Level Functional Flow

1. User creates an SO by selecting **Company**, **Customer**, and **Currency**.
2. User adds items using a new **Type** dropdown: Product / Spare / Maintenance.
3. System determines whether an **OBOM** is needed based on the selected type and **SBOM** reference.
4. **PR** fetches items either from **OBOM** or **directly from SO**, depending on rules.

Detailed Functional Specification

1. Product Type

- Existing logic remains unchanged.
- Always **create OBOM**.
- Only **one product** per SO.

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2. Spare Type

- **Normal Materials:**
  - Skip OBOM, items directly move to PR.
- **Fabricated Materials:**
  - If present in **SBOM** as **semi-finished** → OBOM is created.
  - If not in SBOM → treat as **normal spare** and skip OBOM.
- Multiple spare items **allowed** per SO.

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3. Maintenance Type

- Items **always skip OBOM**.
- Items directly go to PR.
- Multiple maintenance items **allowed** per SO.

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4. PR Fetching Logic

Case	OBOM Needed	PR Fetching
Product	✅ Yes	Items fetched from OBOM
Spare → Normal	✖ No	Items fetched directly
Spare → Fabricated (in SBOM)	✅ Yes	Items fetched from OBOM
Spare → Fabricated (not in SBOM)	✖ No	Items fetched directly
Maintenance	✖ No	Items fetched directly

Development Timeline & Milestones

Phase	Task Description	Planned Dates
1	Requirement finalization & document approval	29-08-2025 → 01-09-2025
2	Database schema changes & backend preparation	02-09-2025 → 03-09-2025
3	UI changes (SO module updates)	02-09-2025 → 05-09-2025
4	Integration of OBOM/PR logic changes	06-09-2025 → 09-09-2025
5	Internal testing & bug fixing	10-09-2025 → 12-09-2025
6	UAT support & client review	13-09-2025 → 14-09-2025
7	Deployment & handover	15-09-2025

Approval Section

This document must be reviewed and signed by the client before development begins.

Client Name & Designation : _____

Signature & Date   : _____