

ERP System Revision Documentation

Prepared By: Suswin Palaniswamy

Job Title: Backend Developer

Company: Zigma Global Environ Solutions Pvt Ltd

Contact Email: creative@zigma.in

Date: 29-08-2025

Intent of the Document:

This document outlines a client-requested revision to the Sales Order (SO) module in the ERP system. It is designed to explain the new requirements, functional changes, and implementation timelines in a way that is clear to ERP stakeholders. The goal is to ensure alignment between Zigma Global's development team and the client before implementation begins.

Terminologies Used:

SO (Sales Order): A record capturing client orders, products, and associated data.

OBOM (Ordered Bill of Materials): A structured list of raw materials and assemblies derived from the SO.

SBOM (Standard Bill of Materials): Predefined material breakdown used as reference.

PR (Purchase Requisition): An internal document used to request procurement of items.

Summary of Revision Request:

Currently, the SO module allows adding a single product per SO and generates an OBOM based on that product. The client has requested an enhancement to handle three types of items within SO:

Product — Existing behavior remains unchanged. **Spare** — Supports normal and fabricated materials with specific OBOM rules. **Maintenance** — Items bypass OBOM and go directly to PR. Additionally, while products remain restricted to one per SO, multiple spare and maintenance items can now be added.

High-Level Functional Flow:

User creates an SO and selects Company, Customer, and Currency. User adds items with a new **Type** dropdown — Product / Spare / Maintenance. System determines whether OBOM needs to be created based on type and SBOM reference. PR either fetches items from OBOM or directly adds the items based on rules.

Detailed Functional Specification:

1. Product Type:

- No change in existing logic.
- OBOM is always created.
- Only one product can be added per SO.

2. Spare Type:

- Two subtypes exist: **Normal Materials:** Bypass OBOM and directly move to PR. **Fabricated Materials:** If present in SBOM as semi-finished: OBOM is created. If not present in SBOM: Treat as

normal spare, bypass OBOM. - Multiple spare items can be added per SO.

3. Maintenance Type:

- Items directly move to PR without OBOM.
- Multiple maintenance items can be added per SO.

4. PR Fetch Logic:

- If OBOM exists: fetch items from OBOM.
- If OBOM not required: fetch items directly from SO.

Development Timeline & Milestones:

Phase	Task Description	Planned Dates
1	Requirement finalization & document approval	29-08-2025 to 01-09-2025
2	Database schema changes & backend preparation	01-09-2025 to 03-09-2025
3	UI changes (SO module updates)	03-09-2025 to 06-09-2025
4	Integration of OBOM/PR logic changes	06-09-2025 to 10-09-2025
5	Internal testing & bug fixing	10-09-2025 to 13-09-2025
6	UAT support & client review	13-09-2025 to 16-09-2025
7	Deployment & handover	16-09-2025 to 17-09-2025

Approval Section:

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

Client Name & Designation: _____

Signature & Date: _____