**TECH AFRICA – STOCKS DATABASE**

**ORDERING MODULE – DESIGN BRIEF**

**Work-flow (General) – Progress reports to be emailed daily to various staff**

* Calculate the stock quantities to be ordered
* Put in quoted prices from the supplier to check the effect of the new price on current selling price
* Once order quantities decided, an order generated and sent to supplier
* Final supplier invoice checked against the order
* Insurance on the shipment then needs to be done
* Booking of container on ship or with transporter (add to parameters and to do list)
* Daily emails on orders status
* When border ETA is 2 weeks, the duties report must be sent to the clearing agent to start the pre-clearance process
* Permits, BV Certs, Invoices and all other docs for the order will be attached and emailed to the clearing agent
* Duties will be paid and the POP will be attached to the database and then emailed to the clearing agent
* When stock received, then order lines will be moved to a new table for costings
* Tracking of special orders to be done and flagged as supplied once supplied

**Functions / Working Parameters**

* Calculate the stock quantities to be ordered
  + This must look at
    - Sales for various periods to get average consumption
    - Order requests by staff
    - Back orders
    - Container multiples must be looked at for larger items
      * For goods from China, the container restrictions on weight and volume must not be exceeded
    - A column for the general manager to add additional items where needed
    - Orders from South Africa will need to have minimum order flags – so if an order is under a certain value and/or weight, then that must be highlighted
    - BV and permit issues need to be highlighted straight away and the progress on getting these must also be tracked
    - Special customer orders
* Put in quoted prices from the supplier to check the effect of the new price on current selling price (put to a table for orders in progress)
  + A check box and a field for the quantity to order – if check box selected then the
* Once order quantities decided, an order generated and sent to supplier (put to a table for proposed orders)
  + Most will need this in excel
  + If an item is ticked as a spare, then the photo needs to be shown on the order
* Final supplier invoice checked against the order
  + Any short supplies to be put on a table of back orders
* Insurance on the shipment then needs to be done
  + Insurance is not done on shipments for less than USD 10,000.00 – so maybe this needs to be noted or flagged?
  + A rough summary needs to be done calculating the freight costs, cost of goods, and the duties (in USD) for the order
  + The notification of the shipment emailed to Eatons for an invoice
  + Payment to be made and a confirmation of payment needs to be flagged in the system
* Daily tracking of stages to be done and emailed to various staff members
* When border ETA is 2 weeks, the duties report must be sent to the clearing agent to start the pre-clearance process
  + Reports have been started for this but need to be able to do a better screen for entry of this
    - On the form, the item in the order needs a textbox for the line number for the duties quote
    - This will then add up a summary in a sub form
    - Any differences need to be done as a report – so notes will be needed for this process, so that a report on the differences can be sent to the clearing agent for action
    - The final duties payables should agree to the database
    - Some products may need to have the master file tariff changed and the form set-up for this needs to query in the pre-clearance information
      * Either the master file will change
      * Or the flag in the order table will be set to checked if we do not want to change the master file (sometimes the clearing agent is not correct)
* Permits, BV Certs, Invoices and all other docs for the order will be attached and emailed to the clearing agent
* Duties will be paid and the POP will be attached to the database and then emailed to the clearing agent
* When stock received, then order lines will be moved to a new table for costings
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**PROBLEM AREAS**

* Record set on the flagging of a tariff checked in the order lines table – code is not working on the rs.findfirst
  + Have managed to get the rs.findfirst picking up the right record number, but it is still editing the first item
  + A general problem when the field to find is long rather than a string