

- 1) Require **master data entry** and excel upload & download system
  - I. User (Stuff/Retailer/wholesaler/company) details including images
  - II. Sales executive details including images
  - III. SKU name—Code—MRP—MOP—Images [Front & back], % of GST
  - IV. Party type -Online, Trade-Retailer, wholesaler, company, Stuff, other
  - V. Party details & define billing rate / margin
  - VI. Party wise credit limit [ age and amount]
  - VII. Active or inactive option for party, user and SKU
  - VIII. Company & Godown master
  - IX. Unit master/Branch master [ Unit selection is mandatory field at the time order entry]
- 2) User access **control & permission**
- 3) **Attendance** maintains [Sales person] and require excel base monthly attendance register. At the time attendance GPRS system fetches user location.
- 4) **KYC registration** form [Its mandatory] without this, user can't submit order against particular party.
- 5) **Replacement request.** Select party type (Online/Trade-Retailer/wholesaler/Company/stuff/Other), Party name (use dropdown/searching area or type name or type register/Last phone no), Previous bill no/ Invoice No and amount [Mandatory], Previous order ID (Fetch from data base if linked or type), delivery address with contact no (fetch or type), select SKU (Fetch or type) & qty (Not more than actual order qty), 1<sup>st</sup> product image (Mandatory), manufacturer code. Require approval system, after getting approval its move to order section and simultaneously mail and SMS goes to party. In approval copy mentioned returnable product details and replace SKU details, party details, previous order id and invoice details, replacement order ID. Require tracking system for returnable products. Require also excel base details report
- 6) Require more specific and useful **dashboard**.
- 7) Activate party and sales manager **assign option**-. Require excel base report.
- 8) **Order Type**
  - I. Fresh
  - II. Replacement
- 9) **Order status**
  - I. Open
  - II. Packing
  - III. RFD
  - IV. Dispatch
  - V. Delivered
  - VI. Cancel
  - VII. Hold

- 10) Require party wise **SKU wise fresh order excel import** option.
- 11) Require **packing slip upload system** [Format we provide] during order approval stage. Simultaneously auto mail goes to party and sales man and also auto update SKU wise approved qty. **No of box and gross & net weight is mandatory field.**
- 12) Require order wise **invoice details** [No, date, value] and **docket details** [No, transporter name, date] entry and **upload system**. Simultaneously SMS goes to customer and sales man. Sales or other user can **download invoice and packing list, POD copy. After putting invoice details and docket details including actual delivery date to party, then system will auto close particular order or admin user can close/cancel/hold order.**
- 13) **Order block-** In force & Auto. If KYC not submit, if party ledger touch limitation. Admin user can block any party or user.
- 14) Activate **payment collection options**. Upload excel file party wise, invoice wise ageing and amount
- 15) **Finished Stock-** Free stock excel upload option require. At the time of order entry user can view current stock position. Negative order entry should prohibit. After order entry generate order copy including Amount. User can download this order. User can also view their order status. **At the time of order entry show SKU image, MRP, MOP, % of GST, Rate (Party margin wise). At the time of order entry user can easy search and select SKU.**
- 16) **New launch-** Upload video and product images with MRP, MOP, % of GST, Rate (Party margin wise when select party). **Show in user dashboard. Require download option**
- 17) **Task Assign- Special and recurring task assign to sales executive. After task assign system should show reminder in user dashboard**
  - I. When users read & accept assigned tasks including TAT, show the same reflection in portal. At the time of rejection reason is mandatory field. Then admin user can reassign task.
  - II. User can put progress against task. GPRS tracking system required. Link with visit log.
  - III. Excel base date wise task id wise complete and pending task report.
  - IV. **Expenses Punch-** Sales executive punch their expenses against task with documents images, this time apps also capture user location. Admin operator view user wise date wise expenses details, documents images and location in portal. Need an excel base expenses details report option. Then admin user can accept and reject particular expenses. Approved expenses move to payable option. Require excel base payable report.

- 18) **Offer launch- Same reflect in user dashboard and sales executive dashboard. At the time of order entry same reflect in order.**

Customer wise, Period wise, SKU wise Offer price master									
SL. No.	Customer name	SKU Name	SKU code	Start Date	End date	Actual MRP	Offer %	After Dis.Amt.	Remarks
	Fetch from master	Fetch from SKU master	Fetch from SKU master			Fetch from SKU master			

- 19) **Transporter assign: When order status is RFD, particular order move to transporter assign section. As per party's delivery pin code user can select transporter. Transporter list show as per below matrix and simultaneously capture number of box and weight from packing list and calculate transportation cost. Generate pickup request and simultaneously PDF copy download and auto mail & SMS goes to transporter, party, sales man.**

**See the attachment**

- 20) **Require MIS report** for order in excel
- I. Sales man wise, party wise, order type wise, SKU wise order status report. [Format we provide]
  - II. Sales man wise, party wise, order type wise summary report [Format we provide]
  - III. Sales executive wise party wise month and year wise sales summary report [Format we provide]
  - IV. Sales executive wise month and year wise sales summary report [Format we provide]
  - V. Replacements report [Format we provide]
  - VI. Return request and approval report [Format we provide]
  - VII. Attendance report
  - VIII. Collection report sales executive wise, party wise, bill wise, order id wise