**Critical path / order tracking software for the clothing sector**

**Project summary:**

Company is based in Nigeria and sells clothing to schools. Company needs to develop a system for management of sales orders and ‘back to back’ purchase orders improving order record and tracking visibility and allowing suppliers / manufacturers remote access to order detail, shared documents / design files and input of order progress information.

**Development:**

The system will either be an extension of an ‘off the shelf’ offering or a bespoke development (potentially using SharePoint 2013).

By way of an indication of scope, the system should provide functionality covering the following areas:

1.1 Product set up

Upload (Excel / CSV formats) and manual entry functionality

Categories

Product year

Product season

Product category (e.g. shirts, trousers …)

Fields

Product code

Product style (name)

Product selling price

Product cost price

Supplier (link to supplier record)

Parameters

Product size

Product colour

1.2 Product enquiry screen

Defaults to an 'all' Products list with functionality to sort on Product category / field Functionality to filter the list on each Product category / field

Functionality to search by Product fields

Functionality to drill down to underlying product data and edit

Functionality to export to Excel and to print

2.1 Customer records

Manual entry functionality

Fields

Name

Address

Tax reference

Contact names

Contact numbers

Contact faxes

Contact email addresses

Delivery addresses

2.2 Customer enquiry screen

Defaults to an 'all' customer list with sort functionality by each Customer field header

Functionality to filter the list on each Customer field and sort by each Customer field header Functionality to search by Customer fields

Functionality to drill down to underlying customer data and edit

Functionality to export to Excel and to print

3.1 Supplier records

Manual entry functionality

Fields

Name

Address

Tax reference

Contact names

Contact numbers

Contact faxes

Contact email addresses

Product (link to product record established on product data entry)

3.2 Supplier enquiry screen

Defaults to an 'all' supplier list with sort functionality by each Supplier field header

Functionality to filter the list on each Supplier field and sort by each Supplier field header Functionality to search by Supplier fields

Functionality to drill down to underlying supplier data and edit

Functionality to export to Excel and to print

4.1 Sales order recording

Sales order entry

Fields

Sequential auto-completing sales order entry number (customisable start) Order date

Sales rep reference

Customer details (link to customer records – possible drop down box completion)

Delivery address (link to customer records – possible drop down box completion))

Delivery date

Delivery instructions (text entry box)

Product order

Functionality to produce a Product order list from a filter by each Product category / field in format:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  | Size 1 | Size 2 | Size 3 | Size 4 | etc. |
| Product code | Product style | Product colour |  |  |  |  |  |

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Functionality to enter numerical order quantities against each order line by size with tab to next size / line

Order screen auto-generates line sales value totals and order sales value totals separately showing any relevant sales tax

Discount functionality

Discount functionality at order line level

Discount functionality at order total level

Functionality to upload and store customer hard copy order

Functionality to upload and store customer logo / design files and/or hard copy Text field for special production instructions

Functionality to print / email customer order confirmation on Company headed copy Functionality to upload and store signed customer order confirmation

Flag box - signed order received flag (order locked from further processes until flagged)

Flag box - payment received flag (order locked from further processes until flagged)

'Back to back' purchase order number record (auto-completes from Purchase order recording functionality)

Functionality to save order at various stages of entry

4.2 Sales order enquiry screen

Generates a list of all sales orders

Fields

Sales order number

Order date

Sales rep reference

Customer name

Delivery date

Total sales value

Total cost value

Flag status

'Back to back' purchase order number record (auto-completes from Purchase order

recording functionality)

Functionality to search on Order date, Sales rep reference, Customer name

Functionality to filter list on Order date, Sales rep reference, Customer name, Delivery date, Flag status, 'Back to back' purchase order number

Functionality to sort list on above fields

Functionality to drill down to underlying sales orders and purchase order including attachment/document logs

Functionality to export to Excel and to print

5.1 Purchase order recording

Purchase order

Functionality to generate a purchase order from a sales order ('back to back' order processing) List of all Flagged sales orders (excluding any that already have 'back to back' purchase orders) Functionality to select a sales order and generate a 'back to back' purchase order Completes 'Back to back' date field on sales order once generated

Purchase order (auto-generated fields from 'back to back' functionality)

Fields

Purchase order reference (auto-completing purchase order reference number with customisable start)

Company name (auto-completes)

Company address (auto-completes)

Company tax number (auto-completes)

Company contact numbers (auto-completes)

Company delivery address (auto-completes)

Supplier details (auto-completes via link to product records)

Linked sales order reference

Product order detail (with cost prices substituted in place of sales prices) in format:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  | Size 1 | Size 2 | Size 3 | Size 4 | etc. |
| Product code | Product style | Product colour |  |  |  |  |  |

Line and order total values with cost values substituted in place of sales values Discount values reworked

Tax values defaulted to 0.00 for manual entry

Access to uploaded and stored customer logo / design files and/or hard copy

Text field for Customer special production instructions

Purchase order (manual completion fields)

Fields

Company delivery date

Company delivery instructions

Tax value (entry auto-updates purchase order totals)

Supplier secure login

Upload

Invoice

Fields – supplier can amend

Payment received

Production complete target / actual date

Quality control date

Shipped date

Tracking reference

Upload

Shipping documentation

5.2 Purchase order enquiry screen

Generates a list of all purchase orders

Fields

Purchase order number

Order date

Supplier name

Company delivery date

Total cost value

Linked sales order number

Linked sales order customer name

Functionality to search on Order date, Supplier name, Company delivery date etc. Functionality to filter list on Order date, Supplier name, Company delivery date, etc. Functionality to sort list on above fields

Functionality to drill down to underlying sales orders and purchase order including attachment/document logs

Functionality to export to Excel and to print

Supplier secure login allowing functionality as above restricted to orders placed on individual supplier

The above detail is only intended to provide a basis for project assessment, recommendations and indicative quotation. It is not an exhaustive or final specification which would only be agreed upon with the successful appointee in a formal planning process. It also does not constitute an offer and any appointment is at the sole discretion of the Directors of Company.