**CHANGE REQUEST FORM**

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| Project Code/ Name: SBC: INVPLUS |
| Description of change requested:  Add functionality to add accessories under items. Create a process for SITC in existing system. |

**Reason / Justification:**

**Reason:-**

Give provision for to add accessories under items. Create a process for SITC in existing system.

**Justification:-**

* As per current system, transactions are created against items. Accessories for these items are not being tracked/captured in the system. Hence provision required to add accessories under each item.
* A separate process for SITC needed as data bifurcation can be done between regular business and SITC business.

……..…………………For Systems Plus use only……………………………………

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| Assessment / impact of change:  **Impact summary.**   |  |  |  | | --- | --- | --- | | **Sr. No** | **Change** | **Particulars** | | 1 | Screen | Create 1- Item Accessories Mapping screen  Modify 22- Item Master, Regular IOF, Stocking IOF, Replacement IOF , Stand by given IOF, Inter branch stock transfer IOF  GRN against verbal, GRN against goods return , GRN against stand by return , GRN against standby received , GRN against replacement, GRN against IBT, GRN against PO  PO, Standby taken PO , Invoice, IBT Invoice, Non chargeable invoice, SOF, DN, DC,PO tracking | | 2 | Database | Create stored procedure for Item Accessories Mapping Master  Modify stored procedures for   * Item Master, IOF, SOF, GRN, PO, DN, DC, Credit Note, Invoice, Payment Entry for Select, Insert, Update, Delete * Stockdetail, helper   Create 8 tables “Item Accessories Master”, “IOFAccessories”, “SOFAccessories”, “POAccessories”, “GRNAccessories”, “DNAccessories”, “InvoiceAccessories”,"CreditNoteAccessories"  Modify Table Item Master, InternalOrderHeader Table  Modify View VwItemMaster | | 3 | Report Design | IOF, SOF, PO, DN( 2 reports normal/goods reject ), DC( 2 reports normal/goods reject ), Credit Note, invoice ( 3 reports old/ new format CGST/ SGST), Serial no Details  Sub reports -PO Annexure, Invoice Annexure, Invoice Serial No, DN material picklist, DC material picklist | | 4 | Report sps | Stock report 12 SPs to be modified for below reports–  Stock customer wise, stock item wise, stock item wise as on date ,stock ledger as on date ,stock with tax details, item listing with quantity, item listing without quantity, weekly status, stock summary, GRN Against Replacement, Serial no Details, IOF, SOF, PO, DN ,DC, Invoice, Credit Note | |  |  |  |   **Details :**  UI/Application Changes:  **Create screen :**  Create Item Accessories Mapping Master screen     * In this screen, accessories can be retrieved and saved against item. "Item Code" textbox will be enabled. * Item related other details like “Sub Group Code”, “Type”, “Category”, “Color”, and “Unit”, “Capacity” etc. will be disabled and user can **not** modify them. * There will be no edit button in the accessories grid. Accessories can be deleted against item. * If accessory used in transactions and deleted then warning message will show but user can delete it. If deleted accessory is used in historical transaction. * One accessory can be linked to multiple items * If user is trying to enter accessories for service item, User will **not** be allowed to save. * User can only enter accessories for **material** item. * When "Retrieve Accessories" button is clicked, all accessories will be available to select irrespective of items "Group Code” ,“Sub Group Code”, “Type”, “Category”, “Color”, “Unit”, “Capacity”     **Modify screens :**  Common points for IOF, SOF , PO, GRN, DN, Invoice   * If there are no accessories linked with the item (as per Mapping master) then "Retrieve Accessories" button will **not** be visible. * If there are accessories linked with the item (as per "Item Accessory Mapping Master") then "Retrieve Accessories" button will be visible. * For first time "Accessories" button will be disabled. On first click of save, it will be enabled. * For SITC types of IOF, SOF , PO, GRN, DN, Invoice( regular/ non-chargeable ), SIT will appear in transaction no. series * For SITC transaction only material/dummy material Items/Accessories can be retrieved * For SITC transaction service Items can **not** be retrieved * Item Quantity zero will **not** be allowed , for sending just accessories without items. Entering item quantity greater than zero is mandatory. * Entering full item quantity, with pending accessories quantity will **not** be allowed. eg. If accessories quantity say 100 is pending, then item quantity full 500 can not be utilized .Entering item quantity 499.9 will be allowed, since accessories are pending. * Currently system supports entering quantity, rate, and amount up to 2 decimal places. **No** changes required for this. * Same SITC transaction can be combination of material as well as dummy materials. * On click of "Accessories" button, popup will be opened to retrieve accessories. * It will **not** be mandatory to save accessory against item (even if item has accessories linked to it in master) User will be just shown warning message at the time of save in such cases and user is allowed to save. Warning message will be "Accessories not entered for some items"   Modify Item Master screen     * If "Is Accessory" checkbox checked in item master screen, then that item can be used as accessory too. * Accessories “Group Code” will come from existing “Item Group Code Master” * Accessories “Sub Group Code”, ”Type”, ”Category”, ”Color”, ”Unit”, ”Capacity” will come from “Item Type Master” screen * Accessories “Type” can be only “Material” (Not Services). * User can not make accessory inactive if it has been used in item master. User will be shown message “This accessory is associated with item. Please remove accessory from item master first”. * User can not make accessory inactive (i.e. Uncheck "Is accessory" checkbox in item master screen), if it has been used in transaction (e.g. IOF/SOF/GRN etc.). In this case, user will be shown message-- “Unchecking 'Is Accessory' not allowed as this accessory is used in transaction”. * Accessory say "cable box" can **not** belong to parent item with same part code i.e. "cable box" part code   Modify IOF screen.   * If the there are no accessories linked with the item (as per Mapping master) then "Retrieve Accessories" button will not be visible. * If there are accessories linked with the item (as per Mapping master) then "Retrieve Accessories" button will be visible. * For first time "Retrieve Accessories" button will be disabled. On first click of save, it will be enabled. * SITC IOF no series will be having "/SIT/" mum/IOF/SIT/092017/001 * Regular/ Replacement / Stand By Given IOF can be SITC type. * IBT/Stocking IOF can **not** be SITC type.     Modify SOF screen.   * "Retrieve Accessories" button will be visible. * If SOF is created against IOF, then only accessories of respective IOF will be available. New accessories can be retrieved or existing can be deleted. * If SOF is created against customer PO, new accessories can be retrieved or existing can be deleted. * SOF no series will be including letter "SIT" e.g. MUM/SOF/SIT/102011/001     Modify PO screen.   |  |  |  | | --- | --- | --- | | **PO Type** | **PO Against** | **Accessories Available** | | NET | Verbal / Internal Order / Sales Order | Yes | | CAP | Verbal / Internal Order / Sales Order | No | | SER | Verbal / Internal Order / Sales Order | No | | COM | Verbal / Internal Order / Sales Order | No |  * If PO is created against verbal, then accessories will be available from item master. * If PO is created against IOF/SOF, then only accessories of respective IOF/SOF will be available. * Accessories amount also will be added to total value of PO. * PO No. series will be having "/SIT/" e.g. "SBC/MUM/SIT/102017/035"  |  |  | | --- | --- | | **PO Against** | **SITC can be created** | | Verbal | Yes | | Internal Order | Yes | | Sales Order | Yes |     Modify GRN screen.   * For GRN against verbal types accessories will be retrieved from Item Master. * In GRN against PO, Standby Received only accessories of respective PO can be retrieved. * In GRN against Goods Return, Replacement, Stand by Return, IBT only accessories of respective DC can be retrieved. * Location for Accessories **need not** be same as that of its respective parent item. * Accessories amount will be added to total value of GRN. * GRN against IBT can **not** be of SITC type * GRN against Goods Return, Replacement, Stand by Return, GRN against PO, Standby Received, verbal can be of SITC type.   Modify DN screen.   * For DN against IOF, accessories of respective IOF can be retrieved and editable * For DN against SOF, accessories of respective SOF can be retrieved and editable * For DN against GRN, accessories of respective GRN can be retrieved and editable * IN DN only accessories of respective SOF/IOF/GRN will be available. * If "Display Accessories" option is checked, DN report will show with accessories. * If "Display Accessories" option is not checked, then DN report will show as per old format i.e. without accessories. * Regular/Replacement/Stand by Given/Goods Reject/Stand By Return To DN **can** be of SITC type. * IBT DN **cannot** be of SITC type     Modify DC screen.   * Accessories for each item will show in grid. * Accessories are **not** editable. * Collapse button provided to collapse accessories of individual item. By default Accessories will open in expanded view * If "Display Accessories" option is checked, DC report will show with accessories. * If "Display Accessories" option is not checked, then DC report will show as per old format i.e. without accessories. * Regular/Replacement/Stand by Given/Goods Reject/Stand By Return To DC **can** be of SITC type. * IBT DC **cannot** be of SITC type.     Modify Invoice screen.   * In Invoice screen, accessories of respective DC can be retrieved, edited/deleted. * If "Display Accessories" option is checked, invoice report will show with accessories. * If "Display Accessories" option is not checked, then invoice report will show as per old format i.e. without accessories. * Invoice no series will be including letter "SIT" e.g. SINSIT022018000001, MUMNCSIT022018000001 * Non chargeable/Regular invoice can be of SITC type * IBT invoice **cannot** be of SITC type  |  |  |  |  | | --- | --- | --- | --- | | **Invoice No** | **Type** | **Is Chargeable** |  | | MUMSIT022018001 | Material | Yes | SITC | | MUMS022018000041 | Service | Yes | Regular | | MUM022018000001 | Material | Yes | Regular | | MUMNCSIT022018001 | Material | No | SITC | | MUMNCS022018001 | Service | No | Regular |     Modify Payment Entry   * User should be able to create vouchers with invoices of SITC type. * Balance amount, Already Paid Amount etc. should populate considering amount of SITC invoices as well. * Screen design changes not required. * **No** change in voucher number series * Single voucher can have combination of regular invoice as well as SITC invoice   Modify PO Tracking    Stock   * If Accessory for **Item** say "A1" with 500 quantity added to store. Then in SITC DC of this 500 quantity needs to be dispatched, that will be allowed. Stock deallocation **not** needed for same. * Item can be accessory as well. If item "A1" added to store with 300 item quantity. If Accessory "A1" for **Item "**H1" with 500 accessory quantity added to store. Then total stock for "A1" will be 500+300=800   **No** changes required in screen design of -Stock Deallocation, stock adjustment, Opening balance ,Closing screen, Debit Note, Credit Note ,Tax Master etc.  Common points for reports-   * In every report in which accessories are shown, they will be show with expand/collapse button * All accessories will be shown expanded by default. User can click on minus sign of individual item to collapse accessories of respective item.   Modify Reports :-  IOF report-    SOF report-    DN Report-    DC Report-    PO Report-    Invoice Report-    Serial No Report:    Credit Note    **No** other reports design will change other than the reports mentioned above.  **No** changes required in report filter criteria  **No** changes required in No series for voucher / credit note /IBT invoice /IBT IOF/Stocking IOF/IBT GRN/IBT DN/IBT DC  Database changes :   * Create stored procedure for Item Accessories Mapping Master, SITC IOF * Modify stored procedures for IOF, SOF, GRN, PO, DN, Invoice for Select, Insert, Update, Delete * Create 8 tables “IOFAccessories”, “SOFAccessories”, “POAccessories”, “GRNAccessories”, “DNAccessories”, “InvoiceAccessories”,"CreditNoteAccessories" * Modify stored procedures for Stockdetail , helper * Modify Table Item Master, InternalOrderHeader Table * Modify View VwItemMaster * Modify report stored procedures for --Stock customer wise, stock item wise, stock item wise as on date ,stock ledger as on date ,stock with tax details, item listing with quantity, item listing without quantity, weekly status, stock summary, GRN Against Replacement, Serial no Details, IOF, SOF, PO, DN ,DC, Invoice, Credit Note   Disclaimer:   * Look and feel may change when actual developed. * Any other changes in Screen / Report other than mention above may require further analysis and effort estimation may revise.  |  |  | | --- | --- | | **Effort estimation** | **Man-days** | | Requirement Analysis & Project Management |  | | Development, Testing |  | | Deployment on TEST and PROD environment |  | | **TOTAL** |  | | |
|  | Date: 4-Oct-2017  Date: 4-Oct-2017 |

**For Developer / Consultants:-**

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| **Module** | **Screen/Unit/Report** | |
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| Developer : Soniya Sabnis  Reviewer: Harshad Pednekar | | Date:  Date: |

**Implementation Details:-**

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| **Implementation Note:**   * SPS will implement the enhancement on Test server for testing * Once confirmed by client it will be than implement on production server by SPS. | |
| Change Request Status **:**  Completion date **:** | |
| Implemented By:  Approved by: | Date:  Date: |