Scope Of Work

Bobs Bath Fitting

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Introduction

Purpose of the Document

This Statement of Work (SOW) outlines the scope, deliverables, responsibilities, timeline, and terms associated with the design, development, and deployment of an integrated web-based platform for Bob's Bath Fitting. It serves as a formal agreement between the client and the solution provider.

Project Overview

Bob's Bath Fitting is undertaking a digital transformation initiative to implement a modular, web-based enterprise platform. The system will encompass functional areas such as vendor management, inventory control, sales operations, HR management, and more, designed to optimize business efficiency and enable data-driven decision-making.

Objectives

Business Goals

- Streamline core business functions such as procurement, inventory, sales, and HR through a unified web platform.
- Improve operational visibility, accountability, and communication across departments.
- Enable data-driven decisions with centralized tracking and reporting tools.

Strategic Alignment

- Align system capabilities with the company's long-term goal of process automation and scalability.
- Reduce dependency on manual processes and disparate systems.
- Support growth with modular and extensible architecture that can adapt to future needs (e.g., affiliate marketing, KPI tracking).

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In-Scope Modules and Features

The project will include the design, development, testing, and deployment of the following functional modules:

- **Vendor Management** – Vendor onboarding, profile management, performance tracking, and invoicing.
- **Inventory Management** – Stock tracking, inward/outward management, valuation, and location mapping.
- **Sales Management** – Lead tracking, quotations, sales orders, and customer accounts.
- **HRMS** – Employee onboarding, attendance, payroll, performance, and training.
- **User Management** – Role-based access, profile updates, authentication, and activity tracking.
- **Supply Chain Management** – Procurement planning, PO management, logistics, and returns.
- **Communication** – Internal messaging, alerts, announcements, and escalation handling.
- **Affiliate Marketing** – Affiliate onboarding, campaign management, payout tracking, and dashboards.
- **KPI Dashboard** – Real-time analytics, trend tracking, visualization, and alerts.

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Vendor Management – Scope

This module enables comprehensive oversight and control over vendor-related activities, from onboarding and material association to documentation, performance analysis, and procurement linkage. It ensures that all vendor interactions are traceable, compliant, and optimized for cost and quality performance.

Detailed Key Functions:

1. **Vendor Onboarding and Registration**
    - Digital onboarding form with mandatory field validations
    - Assignment of vendor category, material type, and operational region
    - Automated approval workflow involving procurement and compliance teams
2. **Vendor Profile Management**
    - View and update contact details, tax IDs, payment terms, and banking info
    - Role-based access for sensitive information
    - Attach business licenses or certifications
3. **Contract & Document Repository**
    - Upload and tag contract documents (PDF, Word)
    - Set contract validity dates and renewal alerts
    - Searchable archive with access control
4. **Material-Vendor Mapping**
    - Assign approved raw materials to vendors
    - Define price breaks or volume-based pricing
    - Track active vs inactive vendor-material relationships
5. **Invoice Management**
    - Upload and associate invoices with purchase orders
    - Filter invoices by vendor, date, or material

- View payment status and discrepancy comments

6. **Vendor Rating & Performance Evaluation**
    - Define evaluation criteria (e.g., quality, delivery, price adherence)
    - System-generated rating based on transaction history
    - Maintain performance logs with comments from the procurement team
7. **Reorder Management**
    - Configure reorder levels per material and vendor
    - Trigger notifications based on usage or stock thresholds
    - Link reorder actions directly to the supply chain module
8. **Vendor Communication Logs**
    - Record email threads, call summaries, and meetings
    - Attach related documents or decisions
    - Generate a communication summary per vendor

Inventory Management – Scope

The Inventory Management module will handle the recording, classification, tracking, valuation, and movement of stock across warehouses. It ensures optimal stock levels are maintained, supports timely reorder decisions, and integrates with procurement, sales, and supply chain workflows.

Detailed Key Functions:

1. **Inventory Categorization & SKU Setup**
    - Define and organize inventory into categories/subcategories
    - Assign unique SKUs, barcodes, and units of measurement
    - Configure material properties like shelf life, temperature sensitivity
2. **Stock Inward Management**
    - Record goods receipt with vendor references
    - Validate incoming stock against Purchase Orders (POs)
    - Assign batch numbers and shelf locations
3. **Stock Outward Management**
    - Track materials issued for production or dispatch
    - Handle returns to vendors or damaged item disposal
    - Generate stock movement slips and reports
4. **Real-Time Stock Level Monitoring**
    - View current stock levels across warehouses
    - Apply filters by location, category, or item type
    - Visual alerts for overstock or low stock situations
5. **Warehouse & Bin Location Mapping**
    - Create virtual map of warehouses, zones, and bins
    - Allocate inventory to specific locations for traceability

- Allow inter-warehouse transfers and track in-transit stock

6. **Inventory Valuation**
    - Support for FIFO, LIFO, and weighted average methods
    - Automated cost calculation and financial posting
    - Integration with finance module for balance sheet impact
7. **Cycle Counting & Auditing**
    - Schedule periodic physical counts
    - Log discrepancies and reconcile digital vs physical stock
    - Approval workflows for inventory adjustments
8. **Replenishment Planning**
    - Define reorder points and safety stock levels
    - Trigger alerts or automatic requests to supply chain
    - Analyze consumption trends for forecasting

Sales Management – Scope

The Sales Management module facilitates end-to-end tracking of customer engagement, quotations, orders, and performance metrics. It streamlines the lead-to-order cycle, helps in forecasting sales pipeline, and ensures customer relationship continuity by maintaining interaction history and transaction records.

Detailed Key Functions:

1. **Lead Management**

- Capture leads from multiple sources (web forms, referrals, calls)
- Assign leads automatically or manually to sales reps
- Track lead stages (new, contacted, follow-up, converted, lost)

2. **Opportunity & Pipeline Tracking**
    - Visual sales funnel with custom stages
    - Monitor pipeline value and closure probabilities
    - Filter opportunities by stage, region, or assigned representative
3. **Quotation & Proposal Management**
    - Create customized quotations from pre-defined templates
    - Track sent quotations, version changes, and customer feedback
    - Get approvals for discounts or exceptions
4. **Sales Order Management**
    - Convert approved quotations into sales orders
    - Assign expected delivery dates and order status
    - Link orders to inventory for availability and fulfillment tracking
5. **Customer Account Management**
    - Maintain customer profiles with purchase and communication history
    - Assign account managers and add internal notes
    - Analyze lifetime value and frequency of engagement

6. **Sales Performance Tracking**
    - Define and monitor sales targets per user, region, or product
    - Generate reports on daily, weekly, or monthly performance
    - Compare actuals vs. targets and identify gaps
7. **Integration with Other Modules**
    - Sync customer and transaction data with inventory for availability
    - Push order data to invoice and dispatch workflows
    - Reflect customer history in KPI dashboards

Human Resource Management System (HRMS)

The HRMS module supports the complete employee lifecycle—from recruitment to exit—while ensuring compliance, consistency, and transparency. It automates core HR functions like attendance, payroll, performance reviews, and employee data management, allowing HR teams to focus on strategic operations.

Detailed Key Functions:

1. **Employee Onboarding & Offboarding**
    - Digital joining form with document upload and validation
    - Auto-generation of employee ID and role mapping
    - Structured exit workflow with clearance checklists and feedback forms
2. **Employee Profile Management**
    - Maintain detailed profiles including personal, educational, and employment data

- Update address, emergency contacts, and financial details
- Secure document repository for contracts, ID proofs, and certificates

3. **Attendance & Leave Management**
   - Integration with biometric or web check-in systems
   - Leave application workflow with balance tracking
   - Define company-wide holidays and department-wise leave rules
4. **Payroll Management**
   - Define salary components (fixed, variable, deductions)
   - Process monthly payroll with statutory compliance (e.g., PF, tax)
   - Generate downloadable payslips and reports
5. **Performance Management**
   - Set and assign KRAs/KPIs to employees
   - Collect 360° feedback from managers, peers, and reports
   - Configure appraisal periods and automate scoring systems
6. **Training & Development**
   - Assign internal or external training programs
   - Track participation, feedback, and certifications
   - Maintain employee skill development history
7. **HR Document Management**

- Centralized storage of offer letters, NDAs, and HR policies
- Define access levels for sensitive files
- Set document renewal and expiry reminders

User Management

The User Management module governs how individuals access the system, based on their roles and permissions. It ensures data security, role-based functionality, and traceable user behavior, enabling effective governance and compliance across all modules of the platform.

Detailed Key Functions:

1. **User Registration & Onboarding**
    - New user sign-up with verification (email/SMS)
    - Admin-managed onboarding for internal teams
    - Role assignment and activation upon approval
2. **Role & Permission Management**
    - Define access levels (admin, staff, vendor, affiliate, etc.)
    - Granular control of module-level and field-level access
    - Permission matrix mapping and role cloning features
3. **User Profile Management**
    - View and update personal information
    - Upload profile pictures and contact preferences

    - Change password and manage linked devices

4. **Login & Authentication**
    - Secure login with encryption and password policies
    - Optional two-factor authentication (2FA)
    - Track failed login attempts and lockout policies
5. **User Activity Tracking**
    - Log and audit user actions across modules
    - Monitor active sessions and last login times
    - Generate usage reports by date, user, or module
6. **Account Deactivation & Deletion**
    - Temporarily disable access without deleting data
    - Permanent deletion with archival of activity logs
    - Automatic deactivation for inactive accounts (policy-based)

Supply Chain Management

The Supply Chain Management module coordinates the end-to-end flow of goods, information, and decisions related to procurement, logistics, and vendor collaboration. It bridges vendor performance with inventory and sales demand, optimizing material availability and minimizing delays and disruptions.

Detailed Key Functions:

1. **Procurement Planning**

- Analyze inventory usage trends to forecast demand
- Generate material requirement plans (MRPs)
- Define safety stock levels and reorder buffers

2. **Supplier Coordination**
    - Send RFQs to multiple vendors and compare quotes
    - Track vendor acknowledgments and terms confirmation
    - Maintain a supplier communication history
3. **Purchase Order (PO) Management**
    - Create, edit, and approve purchase orders
    - Link POs to vendors, materials, and budgets
    - Track PO lifecycle from issue to closure
4. **Logistics & Shipment Tracking**
    - Define shipping rules, carriers, and delivery modes
    - Monitor shipment statuses and ETAs
    - Log delivery notes and any delays or damages
5. **Inventory Replenishment**
    - Auto-trigger replenishment orders based on thresholds
    - Notify procurement team and update stock availability
    - Synchronize with inventory module for real-time impact

6. **Returns & Claims Handling**
   - Log defective or excess goods returns
   - Generate vendor return slips and track credit notes
   - Escalate claim requests for unresolved issues
7. **Supply Chain Analytics**
   - Monitor vendor fulfillment performance and lead times
   - Track cost-to-deliver and shipment delays
   - Generate efficiency and compliance dashboards

Communication

The Communication module enables structured, traceable, and multi-channel interaction among users, departments, and external stakeholders. It centralizes internal discussions, automates alerts, and supports escalations—ensuring no critical message is missed across the operational workflow.

Detailed Key Functions:

1. **Internal Messaging**
   - Direct messaging between system users
   - Create department-based or project-based group chats
   - Attach files and reference transactions within messages
2. **Email Notification System**
   - Set automated email triggers (e.g., PO issued, invoice uploaded)

- Use branded templates for different notification types
- Monitor delivery status and user engagement (read/unread)

3. **Announcement & Notice Board**
    - Post organizational updates or policy changes
    - Schedule visibility duration (start/end dates)
    - Enable user acknowledgment or comments on notices
4. **Escalation & Alert Management**
    - Define escalation paths for delayed approvals or exceptions
    - Send alerts via in-app, email, or SMS
    - Track and log escalated issues until resolution
5. **Integration with External Tools**
    - Connect with platforms like Slack, Microsoft Teams, or WhatsApp
    - Push important updates to subscribed channels
    - Manage integration tokens and user preferences
6. **Communication Logging & Audit**
    - Maintain logs of internal and vendor communications
    - Generate conversation history by user or topic
    - Export logs for compliance and review

Affiliate Marketing

The Affiliate Marketing module manages partner relationships, campaign performance, and commission processing for third-party promoters. It provides tools for onboarding, link tracking, real-time analytics, and fraud prevention to ensure efficient and trustworthy affiliate collaborations.

Detailed Key Functions:

1. **Affiliate Onboarding**
   - Registration form with KYC documentation upload
   - Admin approval workflow with automated confirmation
   - Assign affiliate IDs and generate login credentials
2. **Campaign Management**
   - Create and manage marketing campaigns with custom offers
   - Set start/end dates, eligible products, and limits
   - Assign campaigns to selected affiliates or groups
3. **Link & Code Generation**
   - Generate unique referral links with UTM tracking
   - Enable affiliate-customized landing pages
   - Monitor click-through rates, conversion, and source data
4. **Commission & Payouts**
   - Configure commission structures (flat, tiered, product-based)

- Track eligible transactions and approved earnings
- Schedule automated or manual payout cycles

5. **Affiliate Dashboard**
    - View performance metrics (clicks, conversions, earnings)
    - Access downloadable reports and payout history
    - Notify of new campaigns and announcements
6. **Fraud Detection & Compliance**
    - Detect irregular activity patterns (e.g., click inflation, fake leads)
    - Suspend or blacklist violating affiliates
    - Maintain affiliate agreements and audit logs

KPI Dashboard

The KPI Dashboard module provides real-time, role-specific insights into operational performance across departments. It supports proactive decision-making by visualizing key metrics through charts, alerts, and historical trends—driving continuous improvement and accountability.

Detailed Key Functions:

1. **Dashboard Configuration**
    - Design custom dashboards for roles like Admin, Sales Manager, HR, etc.
    - Choose widgets (bar chart, line graph, counters, heat maps)
    - Save multiple layouts with personalized filters
2. **KPI Setup and Management**

- Define KPIs per module (e.g., on-time delivery, sales targets, stockouts)
- Set goals, thresholds, and tolerances
- Assign KPIs to departments or individuals

3. **Data Source Integration**
   - Connect to modules like Sales, Inventory, Vendor Management
   - Pull real-time data from transactional logs and summaries
   - Support scheduled data refresh or live sync
4. **Visualization and Filtering**
   - View KPIs using visual components (charts, gauges, lists)
   - Filter by date range, product, location, or employee
   - Drill down into data for detailed analysis
5. **Alerts and Notifications**
   - Trigger alerts for KPI breaches (e.g., below target, trend reversal)
   - Send summary reports via email or in-app channels
   - Mark and track resolution of performance issues
6. **Forecasting & Trends** *(optional)*
   - Analyze historical data for predictive insights
   - Compare current vs previous periods
   - Highlight seasonal or departmental patterns

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