Sunlit Future

Project Proposal May 2021

Landing Page

The landing page will display points that need attention and some statistics:

- Number of pending orders (due and overdue)
- Number of pending purchase orders (with ETA and overdue)
- Stock that is below minimum
- Most sold product (quantity wise / value wise)
- Most regular clients and dealers
- Monthly sales totals of the different warehouses
- Current exchange rate

The Landing Page will have a navigation bar on the left hand side with the following links:

- Inventory
  - Main
  - Movement
- Purchase Orders
- Sales
  - Orders
  - Invoices
  - Taxes Statement
  - Overview Statement
- Admin
  - Products
  - Dealers
  - Suppliers
  - Clients
  - Users
  - General Settings

Inventory – Main

The Inventory Main page consists of:

<u>Grid</u>

The inventory will consist of a grid that will list the details of each product. The grid will display the following columns:

1. Unique Identifier (UI)
2. Description
3. Category
4. Current Stock
5. Booked Stock
6. Ordered Stock
7. Current Selling Price (Landed Cost)

Filters
The grid will have filters that will facilitate the retrieval of information. The grid will have the following filters:

- Category (ie, show only "Inverters")
- Warehouse (ie, show only stock at selected Warehouse)
- Dealer (ie, show only stock from a selected dealer)
- Current Stock status (ie, stock that is zero / non-zero / below minimum) Optional: highlight in red or yellow rows where the stock is below minimum.
- Booked Stock / Ordered Stock (ie, show only the rows where the booked stock is non-zero)

These filters can be concurrent, meaning that you can view "inverters" at a selected "warehouse" that are below minimum

Actions

- Button to export the current contents of the grid to a CSV file.

Row Actions
At the end of each row of the grid, the following icons will be available:

✎	Edit the details of the product
ⓘ	Shows a popup screen that lists: pending associated purchase orders and pending associated orders
$	Shows a popup screen with the different margin factors per % and quantity (default 1)
⊗	Mark the inventory product as cancelled. Only possible if the current stock is zero and if all corresponding purchase orders / orders are cancelled

Question: In the spreadsheet (Orders for solar edge) sent to us there is a column at the very end titled "Stock – Booking". This column has negative entries – Quentin and I would like to know how this can happen.

Inventory – Movement

The functionality of the Inventory Movement page is to generate a statement of the movement of a particular product over a selected period of time. This statement can be exported to a pdf or csv file.

The page will have the following elements:

- Input field for the product UI
- Dropdown menu to select starting period "Year/Month"
- Dropdown menu to select ending period "Year/Month"
- Dropdown menu to select to show "All / Purchase Orders / Orders / Invoices"
- Load button
- Export button

The load button will populate the grid with the following details: Each period column (year/month) will have sub-columns Date, Description, Quantity. The right most column of the grid will contain the total quantity for the selected range.

Purchase Orders – Main

The Purchase Orders Main page consists of:

Grid
The purchase orders will consist of a grid that will list the details of each purchase order. The grid will display the following columns:

1. Purchase Order Number
2. BOE Number
3. Date Ordered
4. Date Expected
5. Date Received
6. Credit Period
7. Bill Amount USD
8. Bill Amount INR
9. Customs USD – INR Rate
10. SE USD – INR Rate
11. Duty Amount
12. IGST Amount
13. Bank Charges
14. Clearing Charges
15. Transport Charges
16. SE Due Date
17. SE Payment Date
18. Status (Draft / Ordered / Confirmed / Shipped / Customs / Cleared / Received)
19. User (which user created the purchase order)

Filters
The grid will have filters that will facilitate the retrieval of information. The grid will have the following filters:

- Status (ie, show only “Customs” or “Draft” purchase orders)
- Warehouse (ie, show only purchase orders for selected Warehouse)
- Supplier (ie, show only purchase orders from a selected supplier)
- User (ie, show only purchase order created by selected user)

These filters can be concurrent.

Actions

- Button to create a new purchase Order. This will display a popup window with a form to enter all the details of a purchase order. The order can be saved as a Draft, which means further editing is allowed, or as Ordered.
- Button to export the contents of the grid to a CSV file

Row Actions
At the end of each row of the grid, the following icons will be available:

	Edit the details of the purchase order (if the status is Draft)
	Change the status of the purchase order. See (1) below table
$	Edit the supplier (SE) “Due Date” and Supplier “Payment Date”

	Export the current purchase order to a PDF
	Mark the purchase order as cancelled. Only possible if the purchase order status is Draft

(1) The link will display a popup with the different statuses, where the currently active status will be highlighted. The following details will be displayed according to the currently active status:

- Draft – blank
- Ordered – Date Ordered
- Confirmed – Date Confirmed
- Customs – BoE Date, BoE Number and Exchange Rate
- Cleared – Bank Charges, Clearing Charges and Transport Charges
- Received – Date

To be clarified whether/how the status of a purchase order can be edited/rolled back.

Sales – Orders

The Sales Orders page consists of:

Grid

The sales orders will consist of a grid that will list the details of each sales order. The grid will display the following columns:

1. Sales Order Number
2. Date Ordered
3. Date Dispatched
4. Date Delivered
5. Dealer
6. Amount
7. Payment Type (Cash / Cheque / Bank Transfer / ...)
8. Status (Draft / Processing / Dispatched / Delivered)
9. User

Filters

The grid will have filters that will facilitate the retrieval of information. The grid will have the following filters:

- Status (ie, show only “Delivered” or “Draft” sales orders)
- Dealer (ie, show only sales orders from a selected dealer)
- User (ie, show only sales order created by selected user)

These filters can be concurrent.

Actions

- Button to create a new Sales Order. This will display a popup window with a form to enter all the details of a sales order. The order can be saved as a Draft, which means further editing is allowed, or as Processing.
- To be discussed: as and when entering the products for the Sales Order, how should the various prices (% margin factor) be displayed/suggested?
- Button to export the contents of the grid to a CSV file

Row Actions

At the end of each row of the grid, the following icons will be available:

✎	Edit the details of the sales order (if the status is Draft)
☰	Change the status of the purchase order. See (1) below table
$	Receive a payment for the selected Sales Order. See (2) below table
⤓	Export the current sales order to a PDF
⊗	Mark the sales order as cancelled. Only possible if the sales order status is Draft

(1) The link will display a popup with the different statuses, where the currently active status will be highlighted. The following details will be displayed according to the currently active status:

- Draft – blank Draft / Processing / Dispatched / Delivered
- Processing – blank
- Dispatched – Date Dispatched (do we save the Courier Service?)
- Delivered – Date Delivered

To be clarified whether/how the status of a sales order can be edited/rolled back.

(2) To be discussed whether advances/payments per order should be saved.

Sales – Invoices

To be discussed: same as Sales Orders, except for maybe the Invoice Number, and the destination is "Client" (not Dealer)

Sales – Taxes Statement

This statement will give a breakdown of sales taxes and totals over selected period.

Sales – Overview Statement

The functionality of the Overview Statement is to generate a visual guide to sales totals/details over a selected period of time.

The page will have the following elements:

- Dropdown menu to select "Dealer-wise / State-wise / District-wise"
- Dropdown menu to select starting period "Year/Month"
- Dropdown menu to select ending period "Year/Month"
- Load button
- Export button

The load button will display a map of India with details of sales according to the option selected from the first dropdown. Each area on the map with sales details can be clicked to display further details. These details will be displayed in a popup window and will contain a grid with rows where each row displays the product, the quantity sold and the total amount.

Admin—Products

This page will display a grid of all products. Each product will have the following details:

1. Unique Identifier (UI), also titled "Part No" in your orders spreadsheet.

2. Category, such as Inverter / Optimizer / Metering Solutions / Zero Export / Communication
3. Description, such as Compact / INV 1PH / Energy Meter / CT Coil / Ambient Temp
4. Model, such as 2 KVA / 3 KVA / P 370 /
5. KW Rating, such as 3, P 850 (1.2)
6. Cable Length
7. Comment

This page will have the options to create / edit / delete a product
The grid will also have basic filter options in order to be able to locate a specific product quickly.

Admin – Dealers

This page will display a grid of all dealers. Each dealer will have the following details:

1. Company
2. Address
3. City
4. Zip
5. District
6. State
7. GSTIN
8. Contact Person
9. Cell Number
10. Landline
11. Email

This page will have the options to create / edit / delete a dealer
The grid will also have basic filter options in order to be able to locate a specific dealer quickly.

Admin – Suppliers

(Same as Dealer)

Admin – Clients

(Same as Dealer)

Admin – Users

This page will display a grid of all users. Each user will have the following details:

1. Username
2. Password
3. Access Level(s)

Admin – General Settings

This page will display the details of the company (Sunlit Future), such as address, GSTIN, email, phone and so on.
Other settings, such as default number of rows to display in grids, will be displayed on this page.