**Outline:**

**Users Types:**

* Call Center Agent (CA)
* Delivery Executive (DE)
* Delivery Manager (DM)
* Operation manager (OM)

**Interfaces:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Interface** | **User** | **Functionality** | **Device** |
| **Order Creation** | Call center executive | Input | Desktop |
| **Dispatch** | Delivery executive | Input | Mobile |
| **Delivery wrap-up** | Delivery executive | Input | Mobile |
| **Order list/table (and editing)** | OM, DM, CA | View/Edit | Desktop + Mobile |
| **Summary** | OM, DM, CA | View/Drilldown | Desktop + Mobile |
| **Login** |  |  |  |

**General Guidelines/Remarks:**

* **Minimalistic UI, easy keyboard navigation (should be accepted by users)**
* **Date** & **Time** data export should be Excel compatible
* [optional] Date inputs from pop-up calendar (for Order Creation and Order Editing)
* [optional] Drop-down fields allow typing to quickly access appropriate option from list
* How add/remove users?
* Fast loading

**Master Data: (see attached Excel file for details)**

* Order Number
* Outlet
* Order creation date
* Delivery date
* Delivery slot
* Call center agent
* Call Center remarks
* **Trip type**
* **Status**
* Membership number
* POS bill
* Payment method
* Availability status
* Delivery Executive
* Delivered Date
* Delivered Time
* Delivery Executive remarks
* Attachment?

**Functionality Details:**

**Login:**

* Option to use application without login
* Select current zone/outlet (for DM & DE)

**Order Creation:**

* **Form for relevant data fields (see attached Excel file)**
* **Allow attachments** (PDF or DOC)
* [optional] Date inputs from pop-up calendar
* [optional] Drop-down fields allow typing to quickly access appropriate option from list
* Easy keyboard navigation

**Dispatch:**

* **Enter/Select order numbers for current trip:**
  + From list
  + By search
* Listed/Selectable order numbers must be:
  + from list already inputted during Order Creation
  + only for selected zone
  + status NOT: “dispatch:, :delivered” or “cancel” (or alternatively: status must be “Picked” or “Other”)
    - note: if need to select a return trip, someone will have to first change delivery status for that order
  + Optional: list of orders grouped by delivery date (can be for today, previous date or future date?)
* Order numbers that have already been selected for dispatch previously should not be allowed for selection
* Should not be able to select an order with “Cancel” status
* Optional: if select orders from a later date, prompt “Delivery date is not today. Are you sure”?
* Automatically identify/input Delivery Executive
* **Automatically change status of corresponding orders to “Dispatched”**
* How handle input errors?

**Delivery wrap-up:**

* **Allow to simply tap an order from current trip list (do not show orders already delivered), and provide option to enter remarks**
* Automatically identify/input Delivered Date and Delivered Time
  + If Trip Type is “Return”, do not update Delivered Date or Delivered Time. Instead change trip type to “Regular”
* **Automatically change status of corresponding orders to “Delivered”**
* How handle input errors?

**Order List/Editing:**

* Display table with selected columns in specific order (to be specified later). All columns should be visible without any horizontal scrolling.
  + Different UI for DM and CC? But allow DM to view full details?
  + **Single button for DMs to change status from Confirmed to Picked. Also enter “availability status” here**
* **Group orders by Delivery Date**
* **Allow filtering for specific columns** (to be specified later)**. Should remember filter settings for each user. (filter settings option UI?)**
* **Allow sorting by any column**
* **Search** (keyboard shortcut)
* **Excel/CSV export**
* Easy keyboard navigation (scrolling between rows, shortcut/click for editing entire record, shortcut/click for edit only Status)
* One tap option for downloading attachment (can download multiple attachments together?)
* **~~For entire record editing, display record details as pop-up form (some fields non-editable, to be specified later)~~**
* For editing only Status, display drop-down as pop-up?
* How ensure same record is not being edited by two users at the same time?

**Summary:**

* Display below 3 tables for orders with following conditions:
  + Delivery Date today
  + Delivery Date before today, but status is NOT Delivered or Cancel
  + Trip Type is Return
* Also display Number of orders with trip type “Return”
* Allow quick drilldown (clicking/tapping on any cell should generate order list with appropriate filters)?

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Outlet** | **Unconfirmed** | **Confirmed** | **Picked** | **Dispatched** | **Delivered** | **Cancel** | **Other** | **Total** | **Pending** |
| Banani |  |  |  |  |  |  |  |  |  |
| Banasree |  |  |  |  |  |  |  |  |  |
| Mirpur |  |  |  |  |  |  |  |  |  |
| Monipuripara |  |  |  |  |  |  |  |  |  |
| Uttara |  |  |  |  |  |  |  |  |  |
| Wari |  |  |  |  |  |  |  |  |  |
| **Total** |  |  |  |  |  |  |  |  |  |

**\* Can this table be for ALL OUTLETS as well as a SPECIFIC OUTLET?**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Slot** | **Unconfirmed** | **Confirmed** | **Picked** | **Dispatched** | **Delivered** | **Cancel** | **Other** | **Total** | **Pending** |
| 10-12 |  |  |  |  |  |  |  |  |  |
| 12-3 |  |  |  |  |  |  |  |  |  |
| 3-6 |  |  |  |  |  |  |  |  |  |
| 6-9 |  |  |  |  |  |  |  |  |  |
| **Total** |  |  |  |  |  |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PENDING DELIVERIES** | | | | |
| **Outlet** | **10-12** | **12-3** | **3-6** | **6-9** |
| Banani |  |  |  |  |
| Banasree |  |  |  |  |
| Mirpur |  |  |  |  |
| Monipuripara |  |  |  |  |
| Uttara |  |  |  |  |
| Wari |  |  |  |  |
| **Total** |  |  |  |  |