

Customer Module

Data View Screen

Customer Details should be seen in the grid

Pagination should be default set to 10 Records. On Updating the Grid Pagination View that should be affected to all grids for entire application

Column Header Placement should be in the Format as per Choose Column Default Column Settings

If User is Updating any Column Placement Sequence or size for Column Visibility by drag and drop it should get saved till the further changes made.

Batch Edit should have proper field validations as mentioned below along with Numeric Fields should be right Justified.

Batch Edit

Double Click on any row should allow the user to enter/ edit the details

Hitting on Save Changes, details must get saved.

Hitting on Cancel Button, changes must get discarded

Hitting on Delete Link for any row should ask for confirmation message and details must get updated after confirmation

Right Click on Row must display options like Add, Update and Choose Column

Hitting on Add should open Details Page

Hitting on Updae must open Form View Edit Page

Hitting on Choose Column must open Choose Column Pop up

Detail Section:

Customer ID

-->Autopopulate TextField (Numeric Only- Digits should be seen properly) Numeric Only. Right Justified

ERPID

-->Alphanumeric TextField (10 characters), User can provide data to it (Non Mandatory Field) Right Justified

Organization

-->Autopopulated TextField (Should display the Organization mapped ID) Numeric Only. Right Justified

Item Number

-->Auto populated Field, Non Mandatory TextField, 5 Digit Acceptance, Numeric Only. Right Justified, Zero Value should not be acceptable

Code

-->Mandatory TextField, Alphanumeric Field, 20 Characters Acceptance.

If Code is not provided application should throw proper validation message.

Title

-->Mandatory TextField, 50 Characters , Alphanumeric Field

If Title is not provided by user, application should throw proper validation message

Type Code

-->Dropdown (Default Set to Home Delivery) Values should have: Home Delivery and Brokerage, 20 Characters Acceptance

Web Page

-->TextField, 100 Character Acceptance, Aplphanumeric and specical characters allowed, Should be able to accept with or without http details

Status Code

-->Dropdown Field (Default Set to Active) Statuses Should have: Active, Suspended, Archive , Delete . Apart From Active and Inactive Status opted, details for other Status when selected should not be seen in the Data

View Screen Grid.

Logo

-->Application should allow the user to upload the JPEG, PNG, JPG Format logo.

Note: Sequence for above fields should be as per mentioned

While Creation sub tabs should be seen in sequence as mentioned :

Description (Default Tab) (Accessible while creating Customer)

Address (Accessible while creating Customer)

Business Terms (Once Customer Created, On Form View Edit, Accessible)

Financial Calendar (Once Customer Created, On Form View Edit, Accessible)

Customer Contacts (Once Customer Created, On Form View Edit, Accessible)

DC Locations (Once Customer Created, On Form View Edit, Accessible)

Documents (Once Customer Created, On Form View Edit, Accessible)

Clicking on Save button should save the details along with Information Message that details have been saved.

Clicking on Cancel button should navigate the user to Data View Screen.

Edit Customer Module

Right Click on the selected Customer Record and Opt for Update Option, Edit Customer Page must get opened with details provided by the user.

Description

Description Sub tab should be default set, with Update and Cancel button.

This tab should have Rich Text Editor.

Address

Should be divided in three Dropdown option details

Corporate Address

Billing Address

Work Address

Each of them should be a dropdown field with the details of Contacts appearing from Contact Page. File As Details should be seen in dropdown.

Dropdown must consists of column headers as File As, Job Title, Company , Email Details

POC Textfield should be present (Autopopulated)

Phone (Business) Textfield should be present (Autopopulated)

Email Textfield should be present (Autopopulated)

Address (Business) Textfield should be present (Autopopulated)

There should be Contact Creation Option present for each address section.

Hitting on Contact Card should open Contact Pop up with details like

Contact ID (Autopopulated)

First Name Textbox

Middle Name Textbox

Last Name Textbox

JobTitle Textbox

Company Textbox

Business Phone Textbox

Phone ExtTextbox

Mobile Phone

Primary Email Textbox

Secondary Email Textbox

Business Address Line 1 Textbox

Business Address Line 2 Textbox

Business City Textbox

Business State Province Textbox

Business Zip Postal Textbox

Business Country Region Textbox

Save and Add New Contact Button: Hitting on this will save the Contact Details and display new contact card to create another.

Save Button: Hitting on Save button will save the Contact Details and display the Contact Created details

Cancel Button: Hitting on Cancel button will Close the Contact Card Pop up

Proper Field validation should be seen.

Business Terms

Right Click on grid should display Add , Update and Choose Column Options

Select Add Option, application should open Form For Add Business Terms

CBT ID Autopopulated Field

Item Autopopulated , but can be edited (On saving value should be set and updated)

Code Field, Mandatory Field

Title Field

Type Dropdown

Active Date Calendar should be seen

Value : 20 Numeric letters

High Threshold: On the basis of value field should get updated

Low Threshold On the basis of value field should get updated

Attachment button with Count Details

Status (Default Active)

Proper Field validation should be seen.

On Save details must get saved and grid should get updated.

On Cancel pop up must get closed

Financial Calendar

Right Click on grid should display Add , Update and Choose Column Options

Select Add Option, application should open Form

FCALID Auto populated textfield

Period Order (Item) textfield with auto populated number

Code Mandatory Field

Title Textfield
Description Textfield
Period Start Mandatory Field (Put Validation for dates) Calendar
Period End Mandatory Field (Put Validation for dates) Calendar
AutoShortCode Autopopulated Field
WorkDays Autopopulated Field
Type Deafult set to Financial
Status Default set to Active

Proper Field validation should be seen.
On Save details must get saved and grid should get updated.
On Cancel pop up must get closed

Customer Contacts

Right Click on grid should display Add , Update and Choose Column Options
Select Add Option, application should open Form
CustContactID Auto populated textfield
Item (Item) textfield with auto populated number
Code Mandatory Field
Title Textfield
Contact Dropdown Mandatory Field
Status Default set to Active
Job Title Auto populated textfield
Business Address Auto populated textfield
Primary Email Auto populated textfield
Business Phone Auto populated textfield
Mobile Phone Auto populated textfield

Proper Field validation should be seen.
On Save details must get saved and grid should get updated.
On Cancel pop up must get closed

DC Locations

Right Click on grid should display Add , Update and Choose Column Options
Select Add Option, application should open Form
DC Location Id Autopopulated textfield
Item (Item) textfield with auto populated number
Code Mandatory Field
Title Textfield
Contact Dropdown Mandatory Field
Status Default set to Active
Job Title Auto populated textfield
Business Address Auto populated textfield
Primary Email Auto populated textfield
Business Phone Auto populated textfield
Mobile Phone Auto populated textfield

Proper Field validation should be seen.
On Save details must get saved and grid should get updated.
On Cancel pop up must get closed

Documents

Right Click on grid should display Add , Update and Choose Column Options

Select Add Option, application should open Form

DocumentID Autopopulated textfield

Item Textfield

Code Mandatory Field

Title Textfield

Description TextField

Type Dropdown

Category Dropdown

Attachment button with count details

Date Start (Calendar)

Date End (Calendar)

Renewal Checkbox

Status Dropdown (Default to Active)

Proper Field validation should be seen.

On Save details must get saved and grid should get updated.

On Cancel pop up must get closed

Update and Cancel button

Hitting on Update should update the details

Cancel should navigate the user to data view screen.