» Business Need/Overview/Objectives:

A software is needed to be built for internal use of office, where users will be able to log in and upon their user roles they will be able to see and perform jobs within their designated roles. This software have key features elements as described below in the document. We have to keep in mind

» Top Level Approach:

1. **User Roles:** There will be following user roles on the platform.
   1.1. Intern
   1.2. Permanent employee
   1.3. Owner
   1.4. Super Admin

2. **Registration.**
   2.1. Only super admin & owner can create new users.

3. **log-In:**
   3.1. User will be able to log-in to the system by providing their credentials.

4. **Creation of a Company:**
   4.1. Users with permission, will be able to create a company in the platform by providing the following details such as (Name, email address, Address, Region, Contact Info etc)
   4.2. User will be able to add multiple companies.

5. **Listing of company tab:**
   5.1. Companies will be listed in a their particular tab with their fileds & options to edit, delete.
   5.2. Editing:
      5.2.1. Editing will allow the users to add products associated to a company. Product will have fields such as (serial no, Product name, H.S.code, Packing, Prices, created date, last modified date etc) -
      5.2.2. User will be able to add multiple products to a company.

6. **Products tab:**
   6.1. This tab will be display the data with the following fields (Company name, Products, Packaging, Prices)
   6.2. User upon clicking on any product or company will be redirected to that particular company or product of that company.

7. **Inquiry tab:**
   7.1. This will be a separate tab having functionality described below.
   7.2. **Create task:**
      7.2.1. Owner or Private employee will only be able to create tasks. The task is a note.
   7.3. **Comments:**
      7.3.1. Intern or Private employee will be able to comment on those tasks and submit.
      7.3.2. The comment will display the comment, with the name (user name of the commentor) and date (the date that is at that time of comment) on tasks.

8. **Invoices (Indent):**

8.1. A tab where the invoices can be created, viewed or edit by the Users who have permissions.
8.2. A template will be given by the client of the invoice.
8.3. **Creating invoice:**
8.3.1. Users will be able to create a invoice
8.3.2. There will be few fields that will be auto-generated such as (indent no).
8.3.3. There will be fields that user will input by themselves suchs as (invoice no., PI no, date, Quantity, per mt, date, commision, total invoice amount etc)
8.3.4. There will be fields that will show dropdown options to select from the database such as (Company name, product, packing etc (that is already in added in the database))
8.3.5. Combining all these fields within a template will complete the Invoice.
8.4. **Listing of invoices:**
8.4.1. When creation of invoice will be completed it will be listed with a few changeable options, in following below mentioned manner.
8.4.1.1. Invoice no
8.4.1.2. Date
8.4.1.3. 'Status' Dropdown - User will be able to select and change between following options "draft" and "Complete"
8.4.1.4. 'LC' Dropdown - User will be able to select and change between two options "LC draft" and "LC Complete"
8.4.1.5. 'Employee' Dropdown - It will display all the employees and user will be able to select from the existing employees - Multiple employees can be selected
8.4.1.6. 'Amendment' - Checkmark box - user will be able to mark and un-mark the box.
8.4.1.7. 'CDN' - Checkmark box - user will be able to mark and un-mark the box.
8.4.1.8. Edit CTA - It will allow the user to edit all the fields that are filled at the time of creating the invoice
8.4.1.9. View CTA - It will allow the user to view the invoice.
8.4.1.10. Print CTA - It will allow the user to print the invoice with the auto-generated signature. - signature will be provided by the client.
8.4.1.11. Delete CTA - it will delete the invoice.

9. Stats of the firm:
9.1. This tab will display the analytics of the clients company, these stats will show
9.1.1. Number of invoices in a month
9.1.2. Total Amount of the invoices in a month
9.1.3. Total amount of the invoice that has been marked 'complete' in a month.
9.1.4. Balance amount: It will be calculated by ('Total Amount' - 'Total Amount with complete marked')

10. Users details:
10.1. This tab will be available only to the Owners and Admin
10.2. This tab will show all the registered users and will also allow to create new user with user roles.
10.3. If clicked on a particular user, it will open a new window with the details and stats of that particular user.
10.3.1. **Details:**
10.3.1.1. such as Profile picture, Designation, Commision, etc (Fields that will be used to create a user roles.

10.3.2. **Stats of employee:**

10.3.2.1. Number of companies added for e.g (how many Companies that particular user has created/entered into the system)

10.3.2.2. Number of times the particular user has commented. - it will just be a number - It will not show any more details, nor it will re-direct to any comment.

1. Screens:

2. Following Screens will be created.

- **a)** Log-In
- **b)** Users Dashboards.
- **c)** Company
  - **i.** Listings of company
  - **ii.** Creation of company
- **d)** Inquiry tab
- **e)** Invoice (Indent) tab
  - **i.** Invoice template & Creation of invoice
  - ii. Listing of invoices
- f) Users tab
  - i. List of users
  - ii. Details
  - **iii.** Stats

3. Screens will be shown to user roles as per their permissions.

4. Mobile responsive.

5. Progressive Web-app.

Dev notes:

This is an MVP - 1st phase of a software project.

Developers can add details here what will be required to achieve.

6. Technology stack:

7. Approach

8. **Any other details**