Functional Requirement Document: Order Management Portal

Project Title: Order Management Portal
Platform Type: Web-based (Responsive for Mobile, Tablet, Laptop, Desktop)
User Roles: Admin, Portal User
Customer Access: None (Orders are placed by Portal Users on behalf of customers)

Objective:

The primary objective of this project is to develop a responsive web-based **Order Management Portal** designed for streamlined B2B order management. The platform facilitates **Admin and Portal User** interactions, where **Portal Users place orders on behalf of customers**.

1. User Roles and Access:

1.1 Admin:

- Log in using email and password.
- Can reset password using a "Forgot Password" feature (email-based reset with link).
- Has access to full system functionalities via a responsive dashboard.
- Can manage Portal Users, Customers, Products, and Orders.

1.2 Portal User:

- Created by Admin.
- Receives email invitation to set up a password.
- Can log in using email and password.
- Can place orders on behalf of customers.
- Cannot place orders for themselves.

2. Functional Requirements:

2.1 Authentication and Authorization:

2.1.1 Admin Signup and Login

- Admin can sign up using email and password.
- Admin can login using valid credentials.
- Admin can use "Forgot Password" to receive a reset link via email.

2.1.2 Portal User Invitation and Login

- Admin sends an invitation to create a portal user.
- Portal users receive an email to set their password.
- Portal user logs in using the credentials.

2.2 Dashboard:

2.2.1 Admin Dashboard

- Upon login, redirect to a dashboard showing:
  - Total Products
  - Total Customers
  - Total Orders
  - Total Portal Users

2.3 User Management:

2.3.1 Portal User Management (By Admin)

- Fields:
  - Full Name
  - Email
  - Phone Number
  - Status (Active/Inactive)
- Admin can:
  - Create, View, Edit, Delete Portal Users
  - Activate/Deactivate Portal Users

2.3.2 Customer Management (By Admin and Portal User)

- Fields:
  - Full Name

- Email
- Phone Number
- Company Name
- Company Type
- Shipping Address
- Billing Address
  - Checkbox for "Same as Shipping"
- GST Number (Optional)
- Admin and Portal User can:
  - Create, View, Edit Customers
  - Activate/Deactivate (Admin only)
  - Search by Mobile Number (Portal User)

2.4 Product Management (Admin Only):

- Fields:
  - Product Name
  - SKU
  - Product Description
  - Category
  - Brand
  - Product Type
  - Price
- Admin can:
  - Add/Edit/Delete Products
  - View Product List
  - Activate/Deactivate Products

2.5 Order Management:

2.5.1 Order Placement (Portal User Only):

- Process:
  - Click "Place Order".
  - Search for customers using mobile number.
  - If a customer exists, select and proceed.
  - If a customer does not exist, add a new customer.
  - View available product list.
  - Add multiple products with respective quantities.
  - Review order.
  - Confirm and place order.
- Constraints:
  - Cannot place order for themselves.

2.5.2 Order List (Admin):

- View complete order list.
- Order details:
    - Portal User Name.
    - Customer Name.
    - Product(s) and Quantity.
    - Order Timestamp.
- **Accepting an Order**:
    - The Admin can review and **accept** a placed order. Upon acceptance, an **order confirmation email** will be sent to the customer containing the complete order details.
- **Rejecting an Order**:
    - If the Admin chooses to **reject** an order, they must **provide a reason for rejection**. Once rejected, an **email notification** with the rejection reason will be sent to the **Portal User's email address**.

2.5.3 Order List (Portal User):

- View complete order list.
- Order details:
    - Customer Name.
    - Product(s) and Quantity.
    - Order Timestamp.

2.5.4 Order Confirmation Mail:

- Sent to customer email upon successful order.
- Includes:
    - Portal User Name.
    - List of products with quantities and names.

2.5.5 Order Lifecycle:

1. Pending:

- Triggered when A Portal User places an order for a customer.

2. Accepted:

- Triggered when Admin reviews the order and clicks "Accept".

3. Rejected:

- Triggered when Admin rejects the order after review.

4. Shipped:

- Triggered when Order Placed Successfully.

2.6 Reports(Admin Portal):

2.6.1. Order Summary Report:

- Filters: Date Range, Portal User, Customer, Order Status (Accepted, Rejected)

2.6.2. Product Report:

- Filters: Category, Brand, Status (Active/Inactive)

2.6.3. Customer Report:

- Filters: Company Name, Company Type, Status(Active/Inactive)

3. Non-Functional Requirements:

3.1 Responsiveness:

- Fully responsive across:
    - Mobile Phones.
    - Tablets.
    - Laptops.
    - Desktops.

3.2 Performance:

- Fast loading time (<3s per page).
- Efficient search and filtering.

3.3 Security:

- Passwords encrypted.
- Secure email links (token-based for reset and invitation).
- Role-based access control.

3.4 Usability:

- Intuitive UI for Admin and Portal User.
- Form validations with error messages.

3.5 Scalability:

● Support for thousands of products, customers, and orders.

4. Email Notifications:

Trigger	Recipient	Contents
Portal User Invitation	Portal User	Welcome + password setup link
Password Reset	Admin	Link to reset password
Order Placed	Customer	Portal User Name, Product list with quantities