ESTD 1938
Plymouth

CHICKEN

BEEF

PORK

SAUSAGE

SEAFOOD

DUCK

TURKEY

SPECIALTY

ETHNIC

ORGANIC / NAE

VANGUARD FOODS

DRY

Table of Contents

Plymouthataglance 6
1. Login Architecture 6
2. User group 7
3. Users 8
4. Customer 9
5. PrintPriceBook-GenericFullPricebook 10
6. PrintPriceBook-CustomerPricebook 11
7. Quote 12
8. Item Attributes 13

Login 14
Storyboard 14
WebView 15
Test cases 16
Workflow 16

ForgotPassword 17
Storyboard 17
WebView 18
Test cases 19

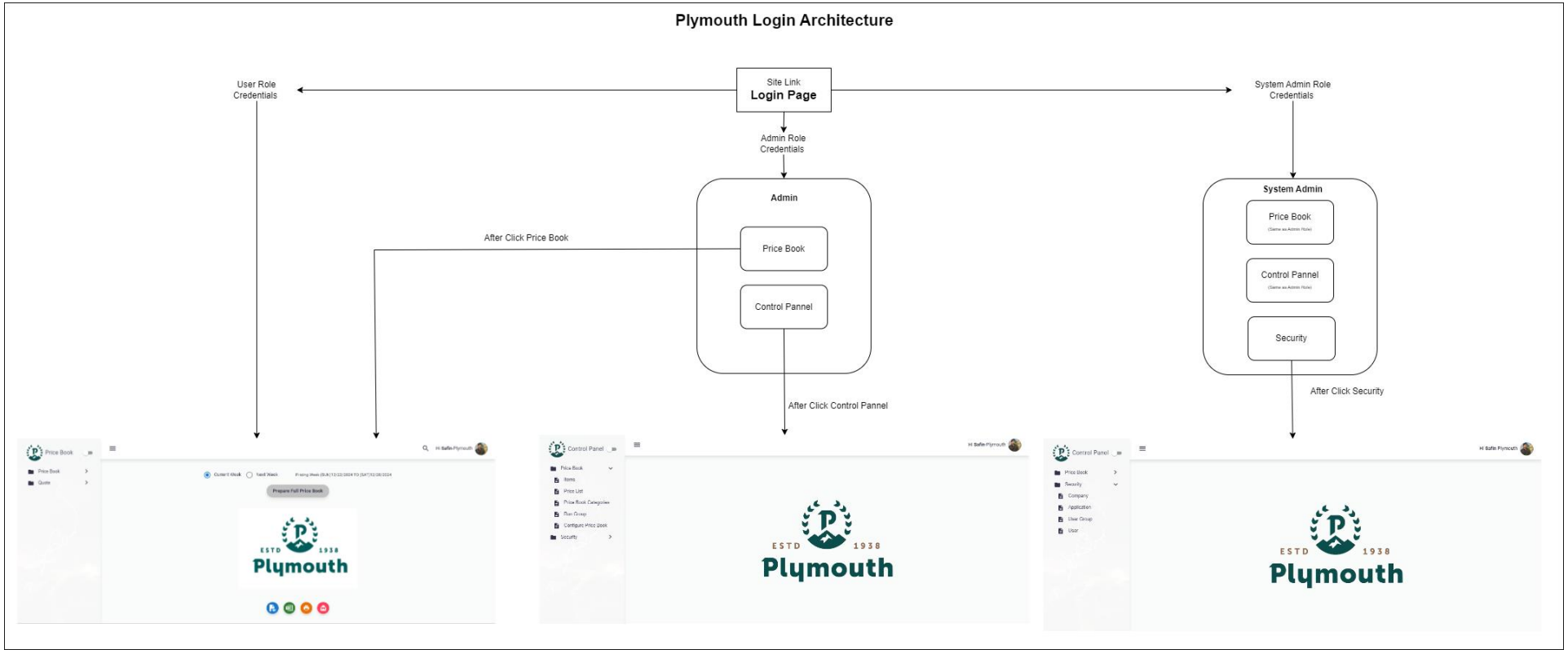
Workflow 19
Change password 20
Storyboard 20
WebView 21
Test cases 22
Workflow 22
ChangepasswordNotification 23
Storyboard 23
WebView 24
Test cases 25
Workflow 25
UnlockPassword 26
Storyboard 26
WebView 27
Test cases 28
Workflow 28
Unlock Password Notification 29
Storyboard 29
WebView 30
Test cases 31
Workflow 31
Home 32
Storyboard 32

WebView 33
Test cases 34
Workflow 34
Price book->Print Price book 35
Storyboard 35
WebView 37
Testcases 38
Workflow 38
Pricebook->RunPricebook 39
Storyboard 39
WebView 41
Testcases 42
Work flow 42
Pricebook->RunPricebook->SendPricebook 43
Storyboard 43
WebView 44
Testcases 45
Work flow 45
Quote 46
Storyboard 46
WebView 49
Testcases 51
Work flow 51

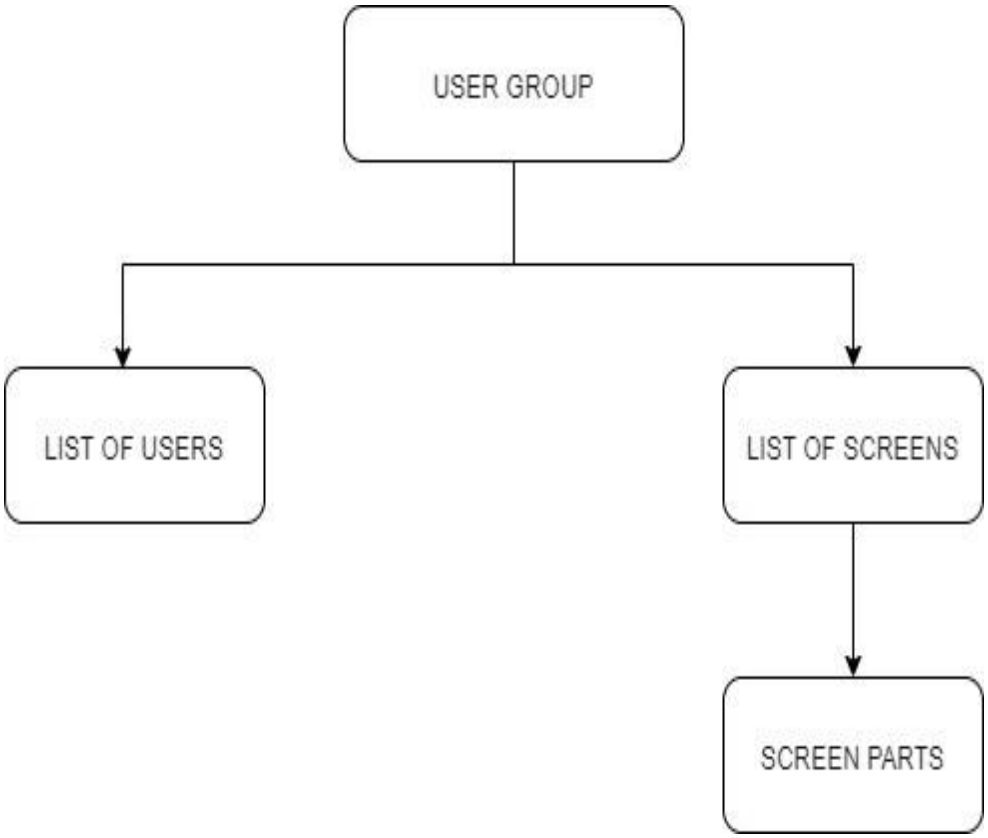
QuoteTemplate 52
Storyboard 52
WebView 53
Testcases 54
Work flow 54

Plymouthataglance

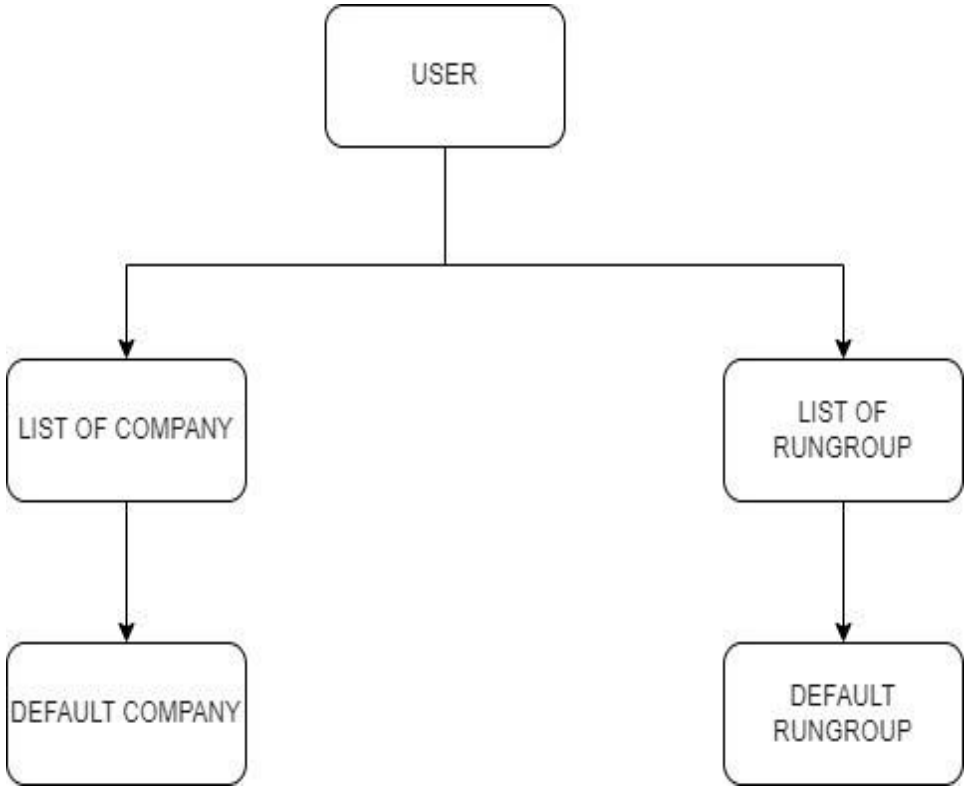
1. Login Architecture



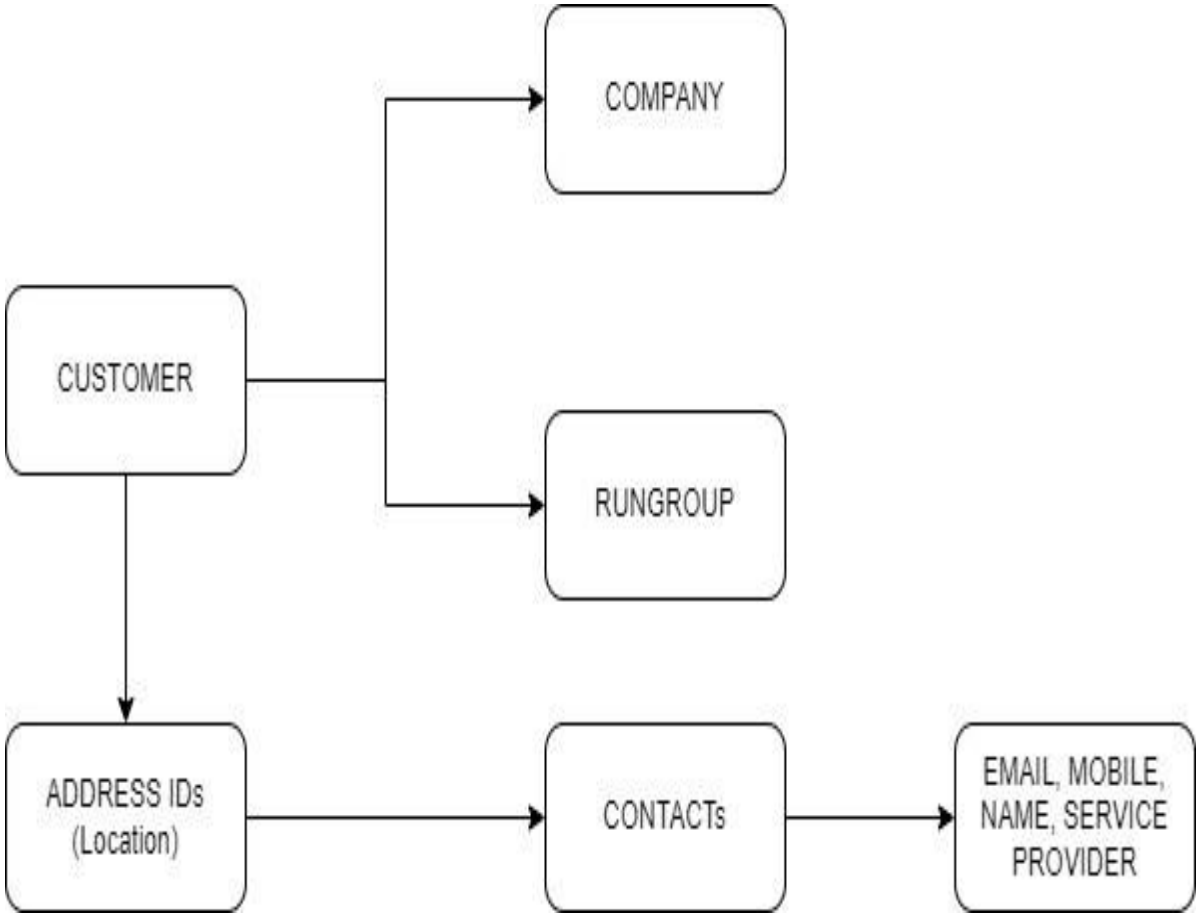
2. User group



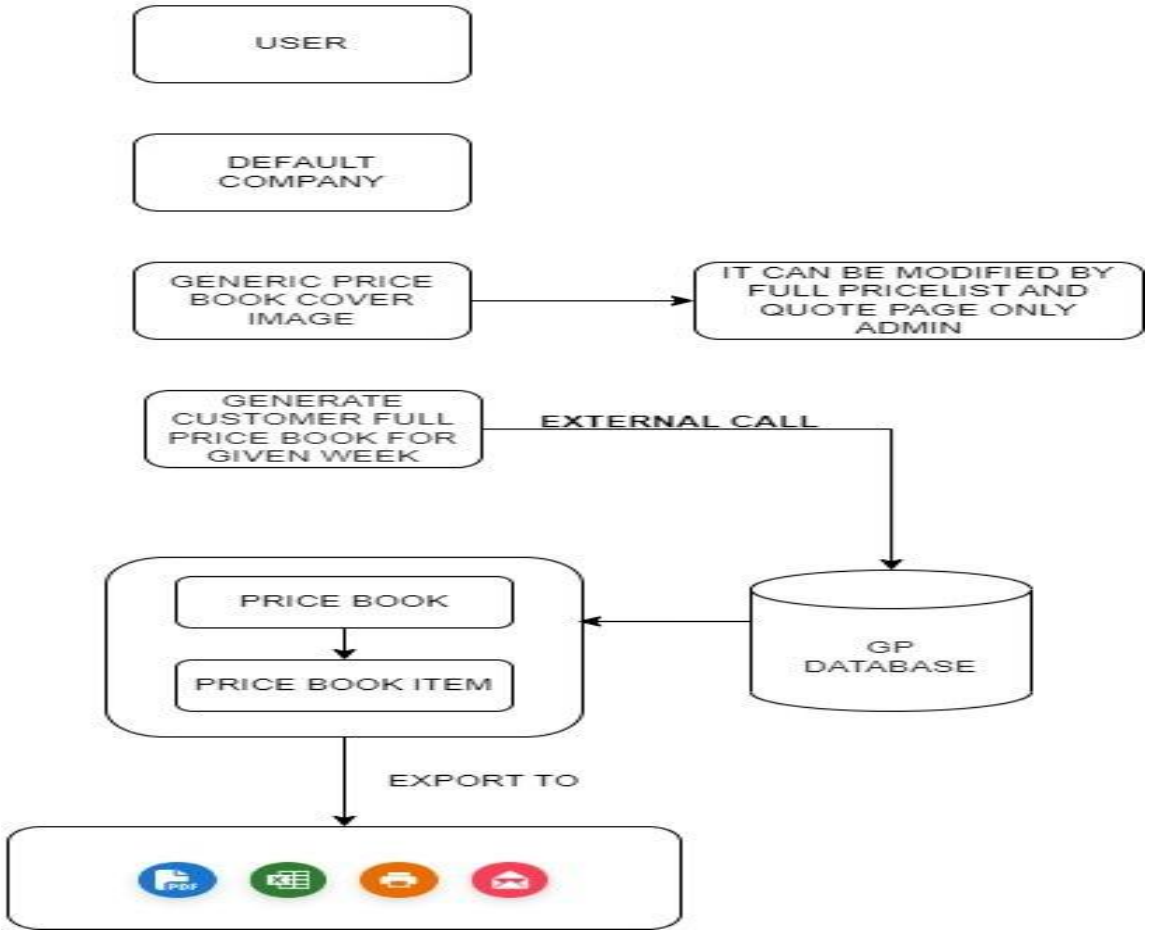
3. Users


USER
LIST OF COMPANY
LIST OF RUNGROUP
DEFAULT COMPANY
DEFAULT RUNGROUP

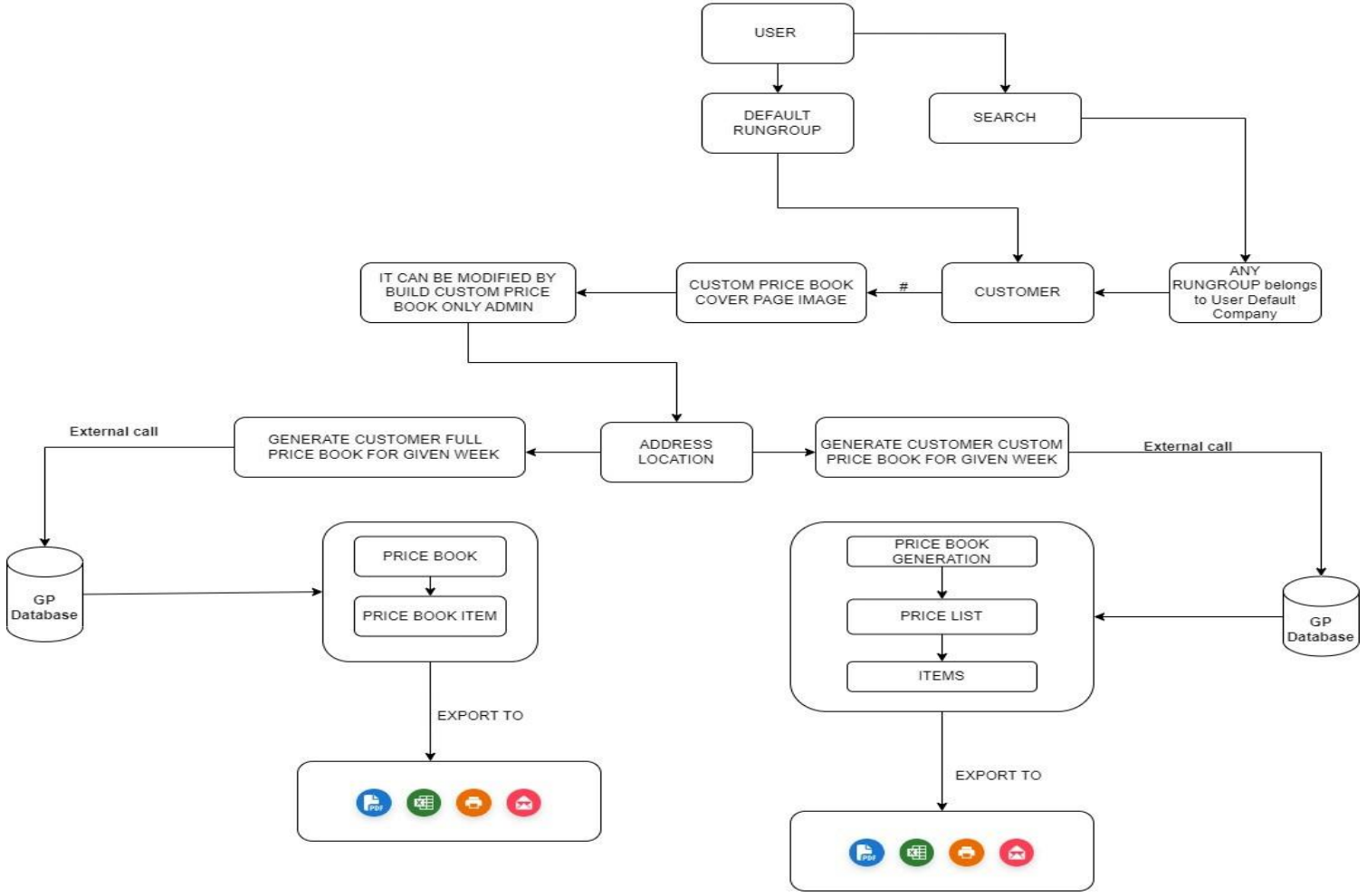
4. Customer


COMPANY
CUSTOMER
RUNGROUP
ADDRESS IDs
(Location)
CONTACTs
EMAIL, MOBILE,
NAME, SERVICE
PROVIDER

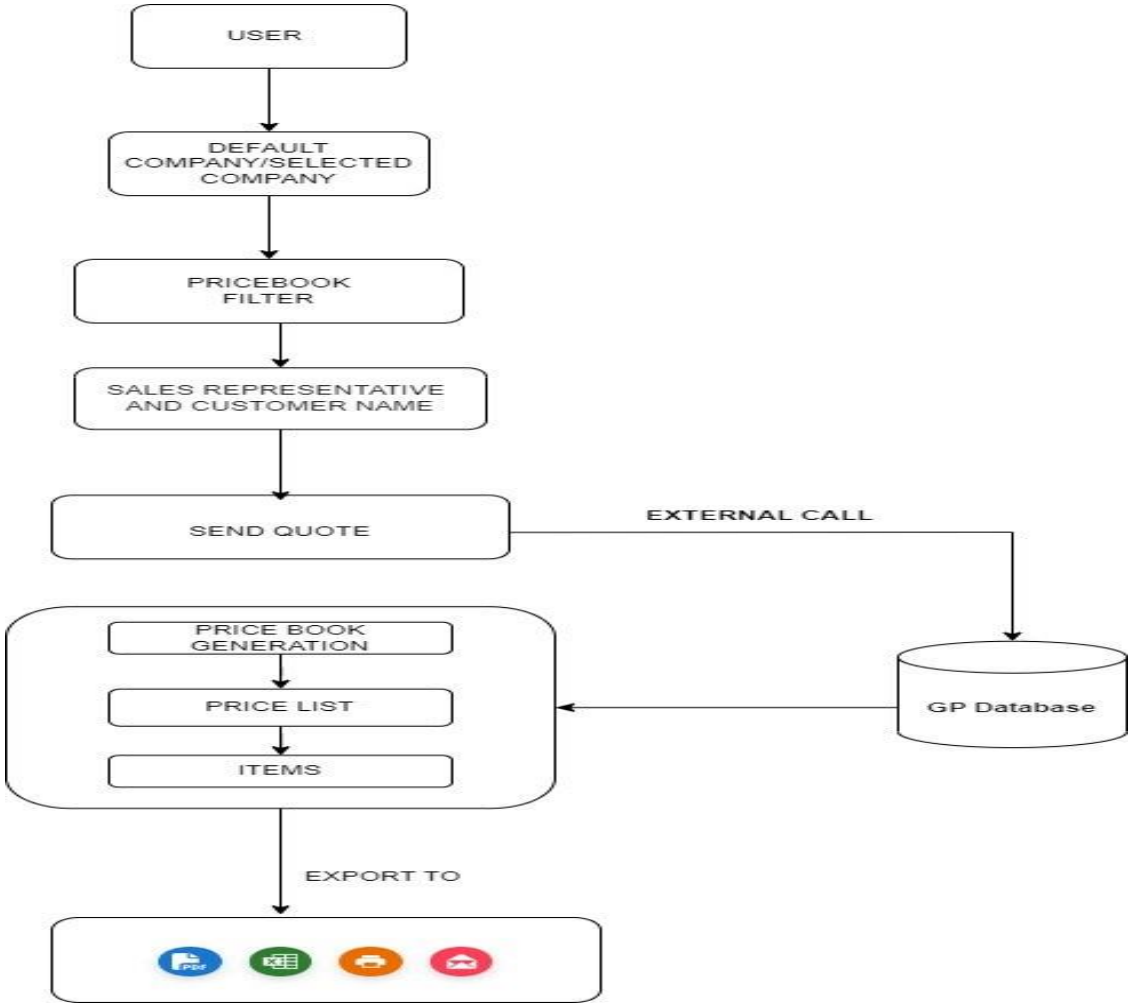
5. PrintPriceBook-GenericFullPricebook



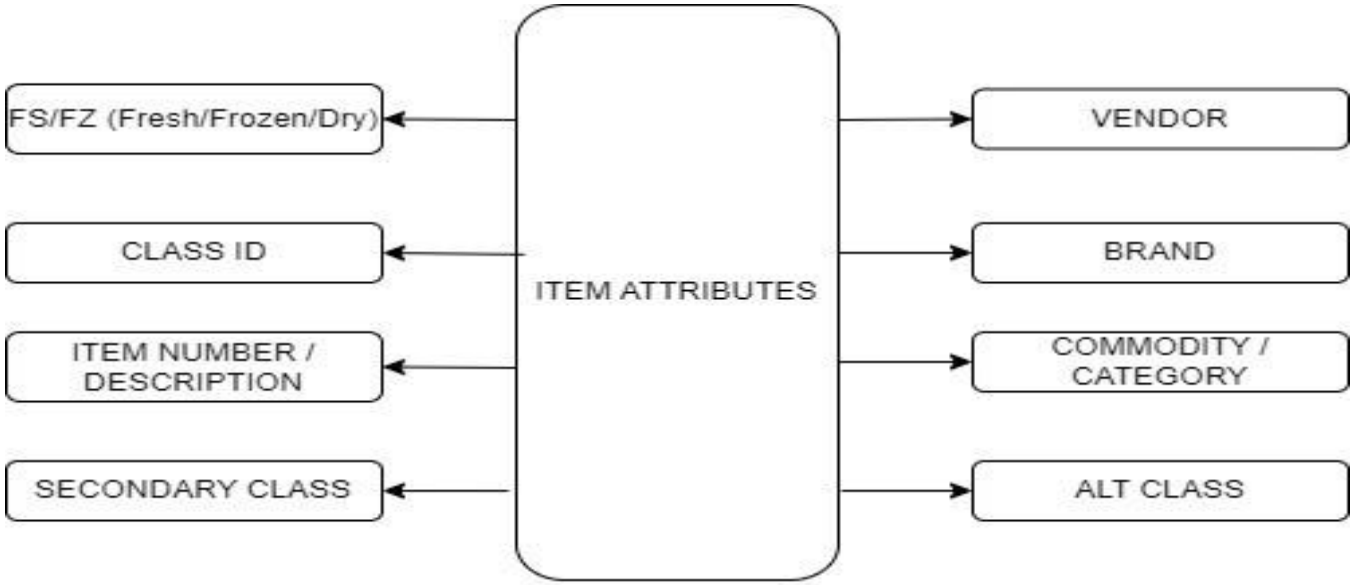
6. PrintPriceBook-CustomerPricebook



7. Quote


USER
DEFAULT COMPANY/SELECTED COMPANY
PRICEBOOK FILTER
SALES REPRESENTATIVE AND CUSTOMER NAME
SEND QUOTE
EXTERNAL CALL
PRICE BOOK GENERATION
PRICE LIST
ITEMS
GP Database
EXPORT TO

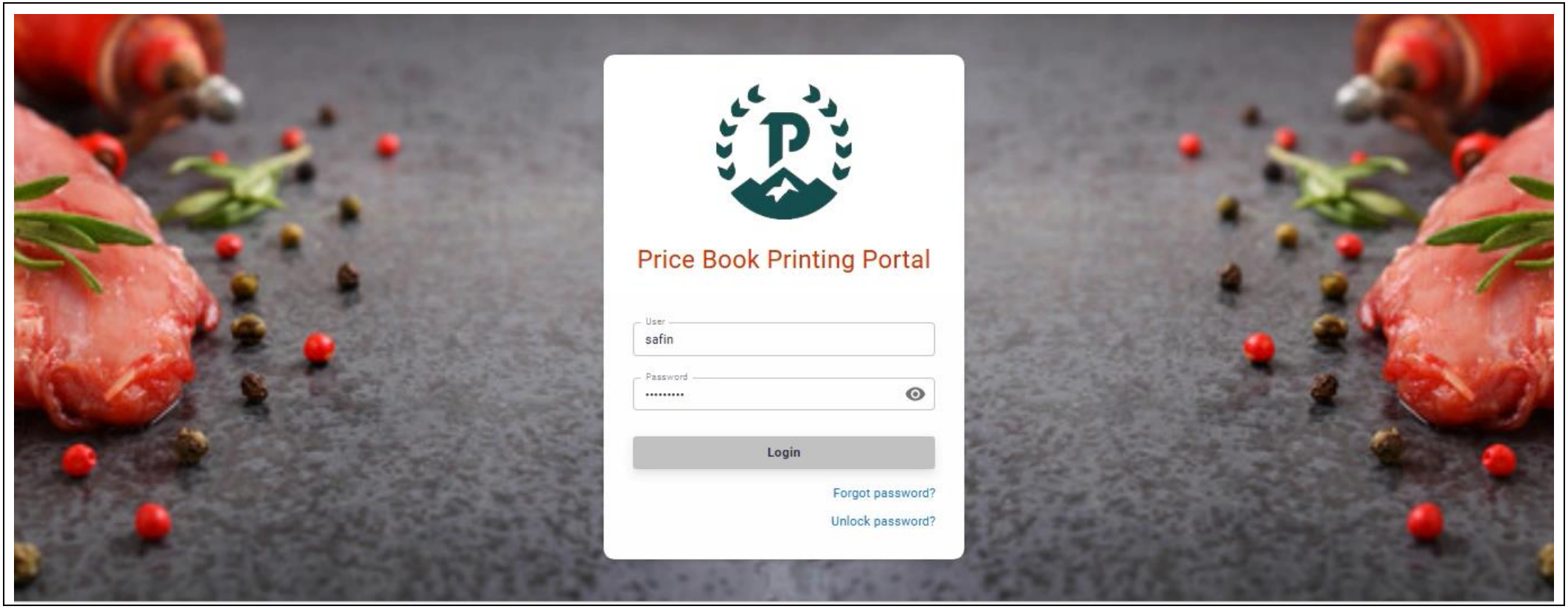
8. Item Attributes



Login

Storyboard

Not Received	Spec Points • LoginLandingPage • ActiveDirectorySynced-sowedon'thavetocreateusernames manually • PlymouthLogowithTitle"PlymouthPricingPortal" • IntheeventthatADSyncisnotanoptioninitially,thenusethe option below • Username*-RequiredField • OnlyAdminsshouldhavetheoptiontoAdd/Remove/Updatean User and/or an existing user • Password*-RequiredField • OnlyAdminsshouldbeabletoresetorupdatethepasswords • Passwordmusthaveaminimumlengthof15characterswith SpecialCharacters,NumbersandLetterswithUpper&lower cases. • Lockoutanaccountwhenusersenterthewrongpasswordthree times. Only Admins should be able to unlock a locked-out account • When users log in, they should get their own Company (Plymouth,S&J,andNickyUSA)background/logobydefault. • Basedonthecompanytheuserisfrom,onlythosecustomers should be displayed. Companies' logo should be populated based on that user • OnlyAdminsshouldbeabletoviewandswitchbetween companies and be able to view all info • CompanyFilterOption-OnlyforAdmins


Price Book Printing Portal
User
safin
Password
Login
Forgot password?
Unlock password?

Test cases

We should ensure all the spec points and functional requirement are achieved

Positive Test cases

- To ensure Plymouth Logo with Title "Plymouth Pricing Portal" in the Login Page.
- To ensure Username will be mandatory and notified accordingly.
- To ensure Password will be mandatory and notified accordingly.

Negative Test cases

- User cannot change company in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Note:

- Active Directory Synced - so we don't have to create usernames manually – hold.
- In the event that AD Sync is not an option initially, then use the option below – hold.
- Only Admins should have the option to Add/Remove/Update an User and/or an existing user – control panel
- Only Admins should be able to reset or update the passwords – control panel

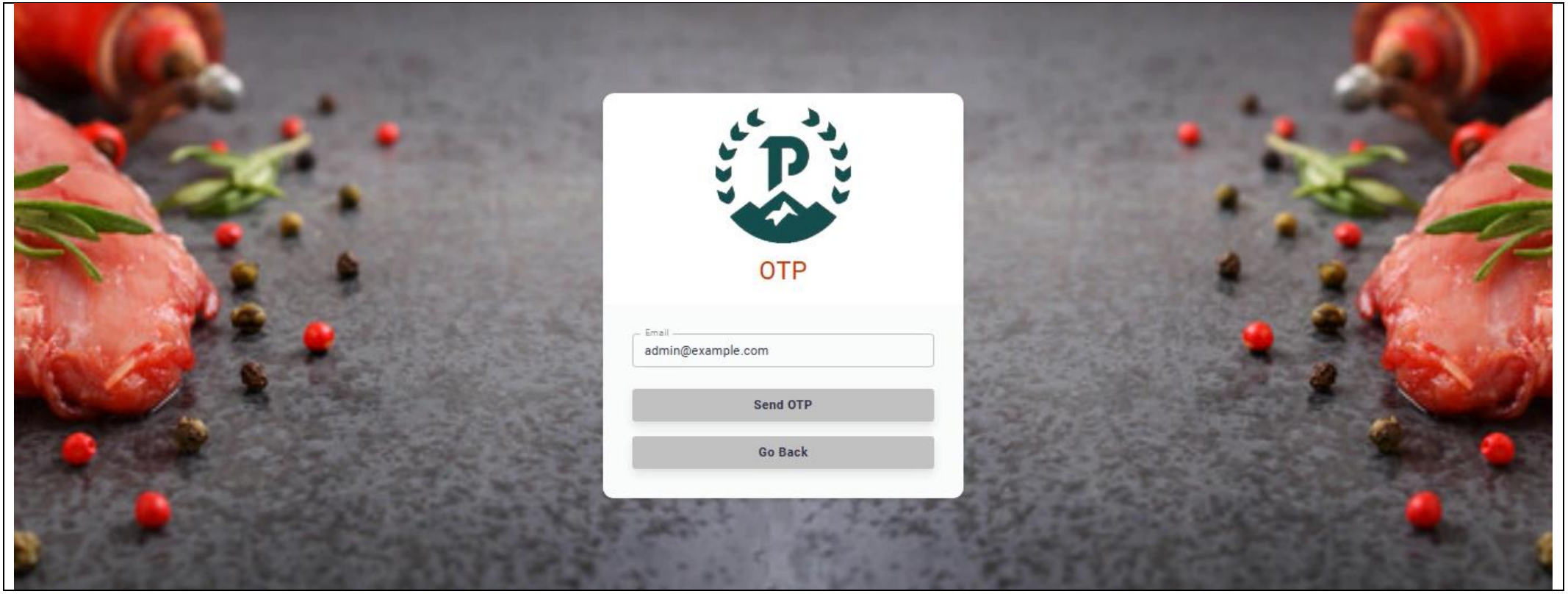
Workflow

We ensure functional connectivity between screen as per business requirement.

ForgotPassword

Storyboard

NotReceived	SpecPoints •


OTP
Email
admin@example.com
Send OTP
Go Back

Test cases

We should ensure all the spec points and functional requirement are achieved

Positive Test cases

- To ensure Plymouth Logo with Title "Plymouth Pricing Portal" in the Login Page.
- To ensure Username will be mandatory and notified accordingly.
- To ensure Password will be mandatory and notified accordingly.

Negative Test cases

- User cannot change company in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Note:

- Active Directory Synced - so we don't have to create usernames manually – hold.
- In the event that AD Sync is not an option initially, then use the option below – hold.
- Only Admins should have the option to Add/Remove/Update an User and/or an existing user – control panel
- Only Admins should be able to reset or update the passwords – control panel

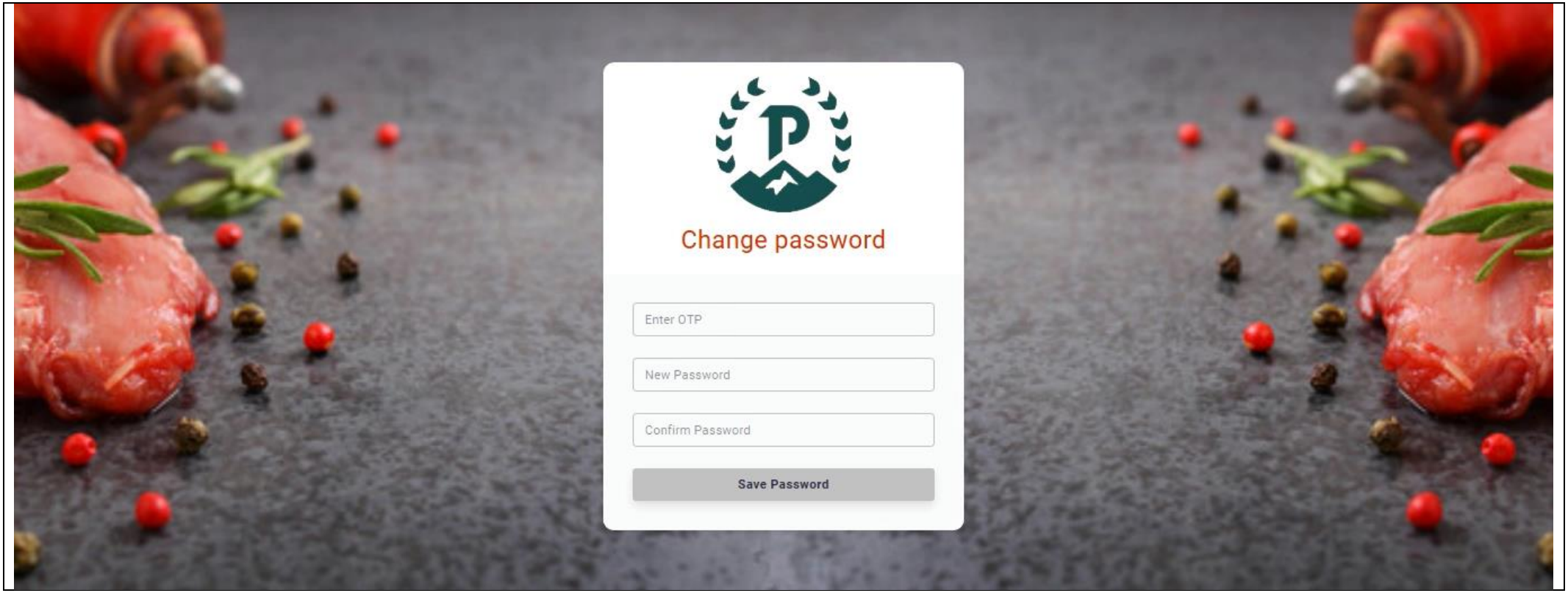
Workflow

We ensure functional connectivity between screen as per business requirement.

Change password

Storyboard

NotReceived	SpecPoints •


Change password
Enter OTP
New Password
Confirm Password
Save Password

Test cases

We should ensure all the spec points and functional requirement are achieved

Positive Test cases

- To ensure Plymouth Logo with Title "Plymouth Pricing Portal" in the Login Page.
- To ensure Username will be mandatory and notified accordingly.
- To ensure Password will be mandatory and notified accordingly.

Negative Test cases

- User cannot change company in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Note:

- Active Directory Synced - so we don't have to create usernames manually – hold.
- In the event that AD Sync is not an option initially, then use the option below – hold.
- Only Admins should have the option to Add/Remove/Update an User and/or an existing user – control panel
- Only Admins should be able to reset or update the passwords – control panel

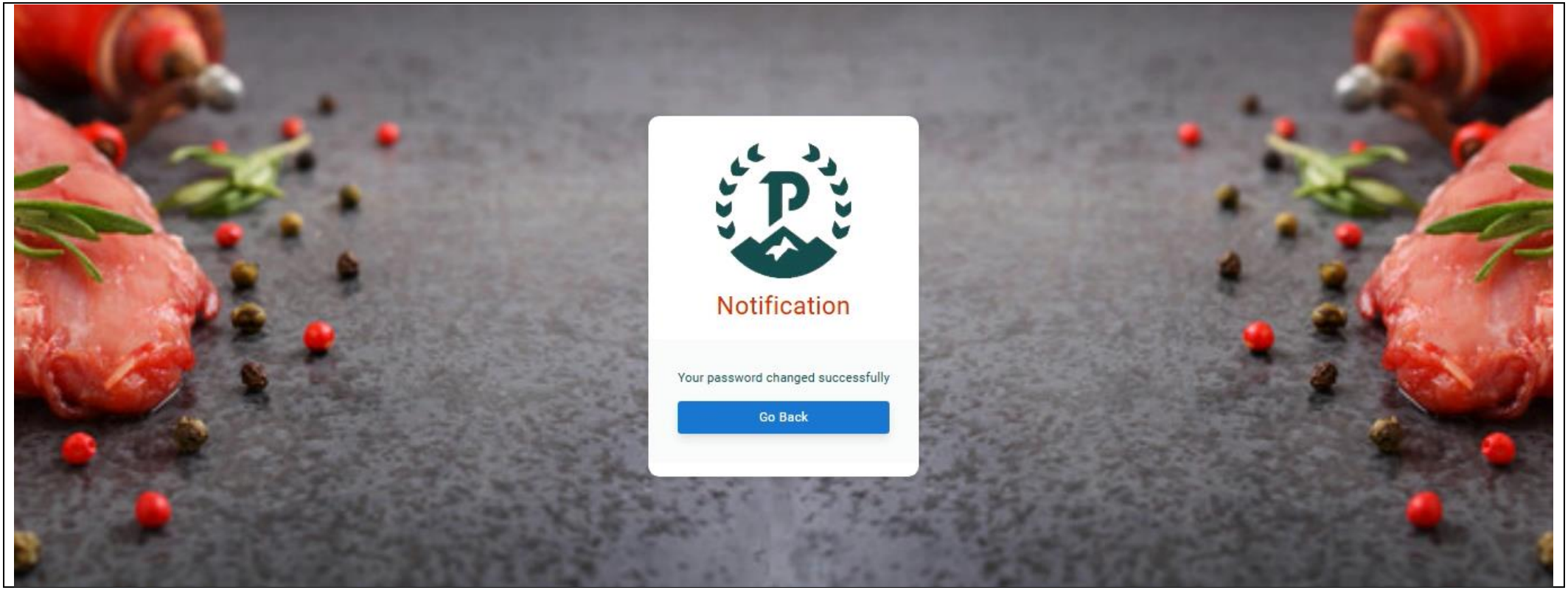
Workflow

We ensure functional connectivity between screen as per business requirement.

ChangepasswordNotification

Storyboard

NotReceived	SpecPoints •


Notification
Your password changed successfully
Go Back

Test cases

We should ensure all the spec points and functional requirement are achieved

Positive Test cases

- To ensure Plymouth Logo with Title "Plymouth Pricing Portal” in the Login Page.
- To ensure Username will be mandatory and notified accordingly.
- To ensure Password will be mandatory and notified accordingly.

Negative Test cases

- User cannot change company in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Note:

- Active Directory Synced - so we don't have to create usernames manually – hold.
- In the event that AD Sync is not an option initially, then use the option below – hold.
- Only Admins should have the option to Add/Remove/Update an User and/or an existing user – control panel
- Only Admins should be able to reset or update the passwords – control panel

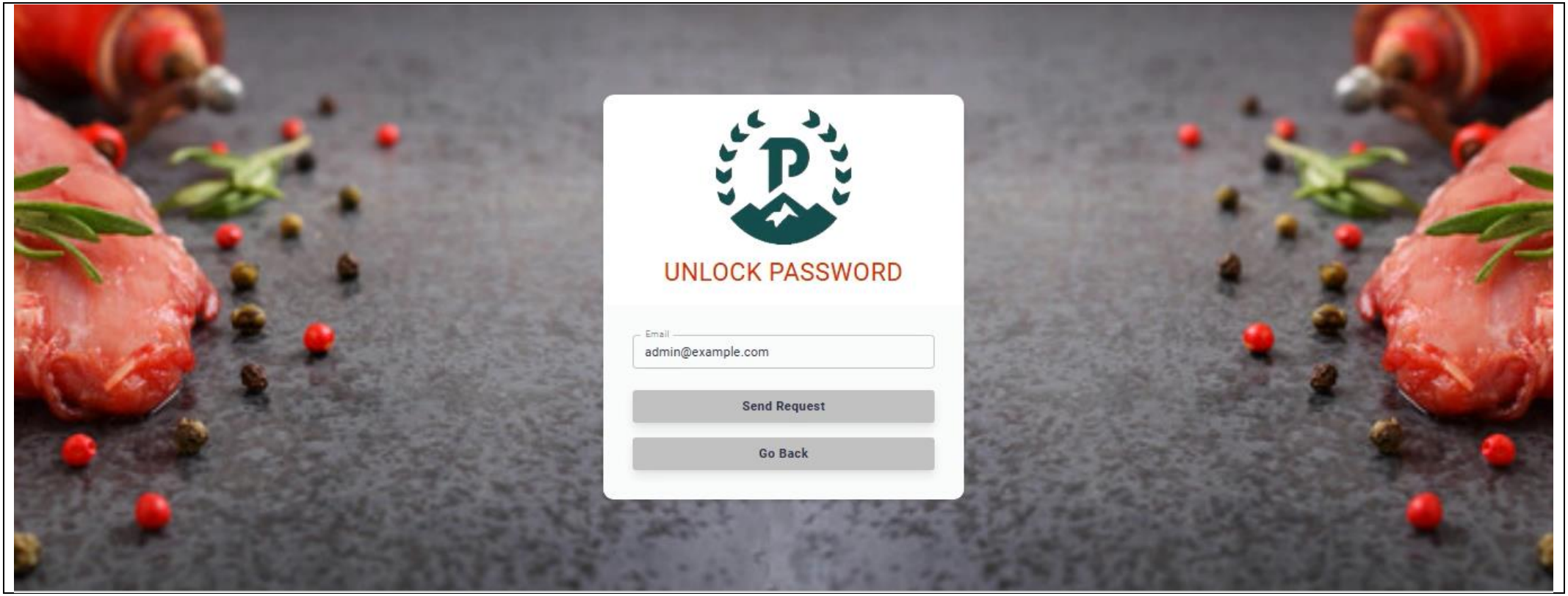
Workflow

We ensure functional connectivity between screen as per business requirement.

UnlockPassword

Storyboard

NotReceived	SpecPoints •


UNLOCK PASSWORD
Email
admin@example.com
Send Request
Go Back

Test cases

We should ensure all the spec points and functional requirement are achieved

Positive Test cases

- To ensure Plymouth Logo with Title "Plymouth Pricing Portal" in the Login Page.
- To ensure Username will be mandatory and notified accordingly.
- To ensure Password will be mandatory and notified accordingly.

Negative Test cases

- User cannot change company in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Note:

- Active Directory Synced - so we don't have to create usernames manually – hold.
- In the event that AD Sync is not an option initially, then use the option below – hold.
- Only Admins should have the option to Add/Remove/Update an User and/or an existing user – control panel
- Only Admins should be able to reset or update the passwords – control panel

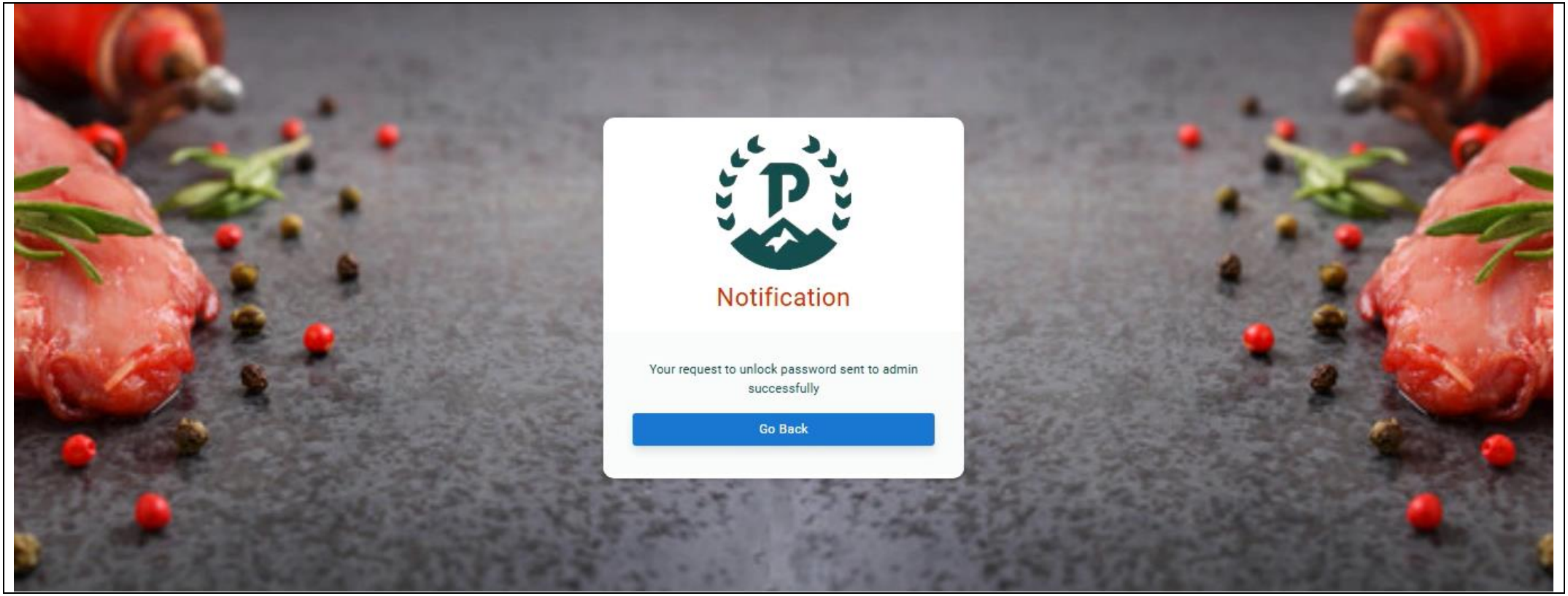
Workflow

We ensure functional connectivity between screen as per business requirement.

Unlock Password Notification

Storyboard

NotReceived	SpecPoints •


Notification
Your request to unlock password sent to admin successfully
Go Back

Test cases

We should ensure all the spec points and functional requirement are achieved

Positive Test cases

- To ensure Plymouth Logo with Title "Plymouth Pricing Portal” in the Login Page.
- To ensure Username will be mandatory and notified accordingly.
- To ensure Password will be mandatory and notified accordingly.
-

Negative Test cases

- User cannot change company in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Note:

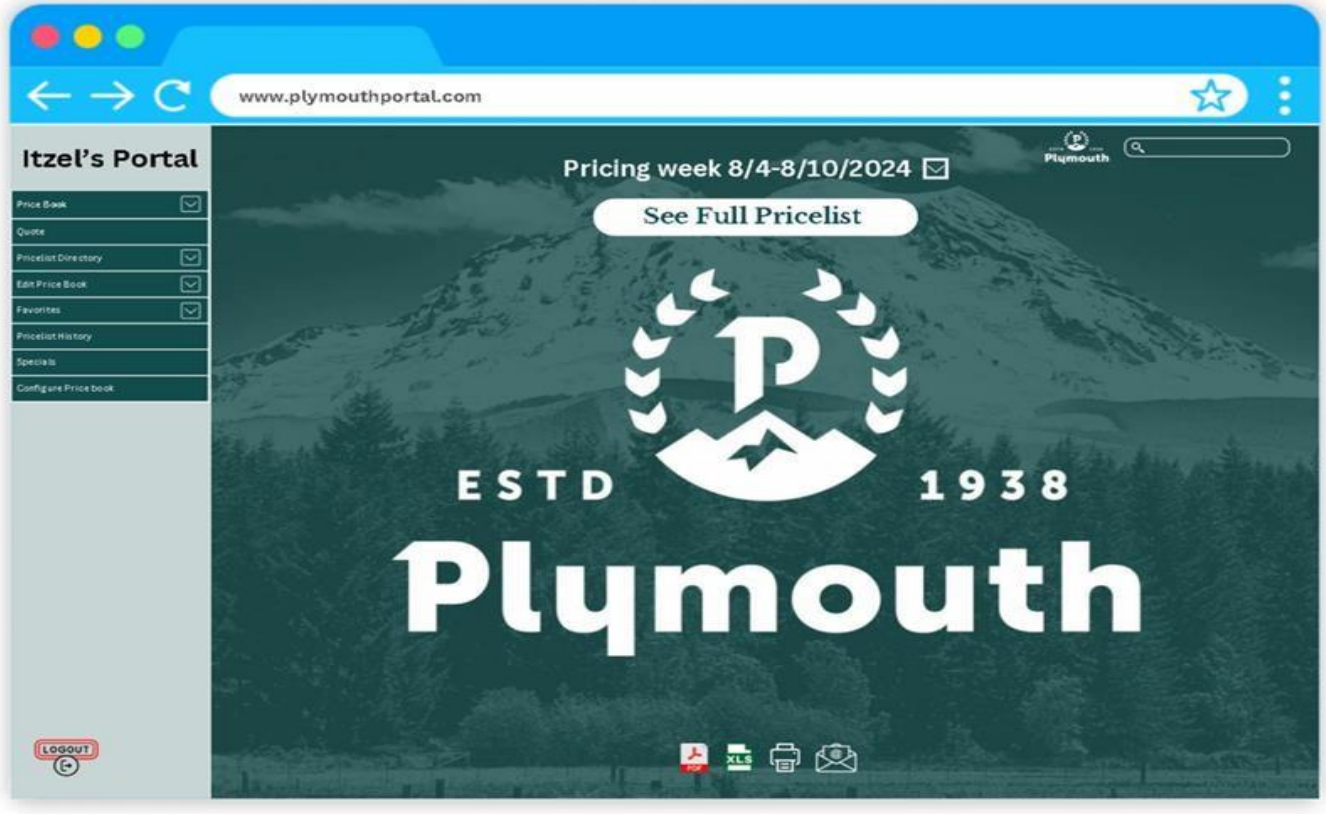
- Active Directory Synced - so we don't have to create usernames manually – hold.
- In the event that AD Sync is not an option initially, then use the option below – hold.
- Only Admins should have the option to Add/Remove/Update an User and/or an existing user – control panel
- Only Admins should be able to reset or update the passwords – control panel

Workflow

We ensure functional connectivity between screen as per business requirement.

Home

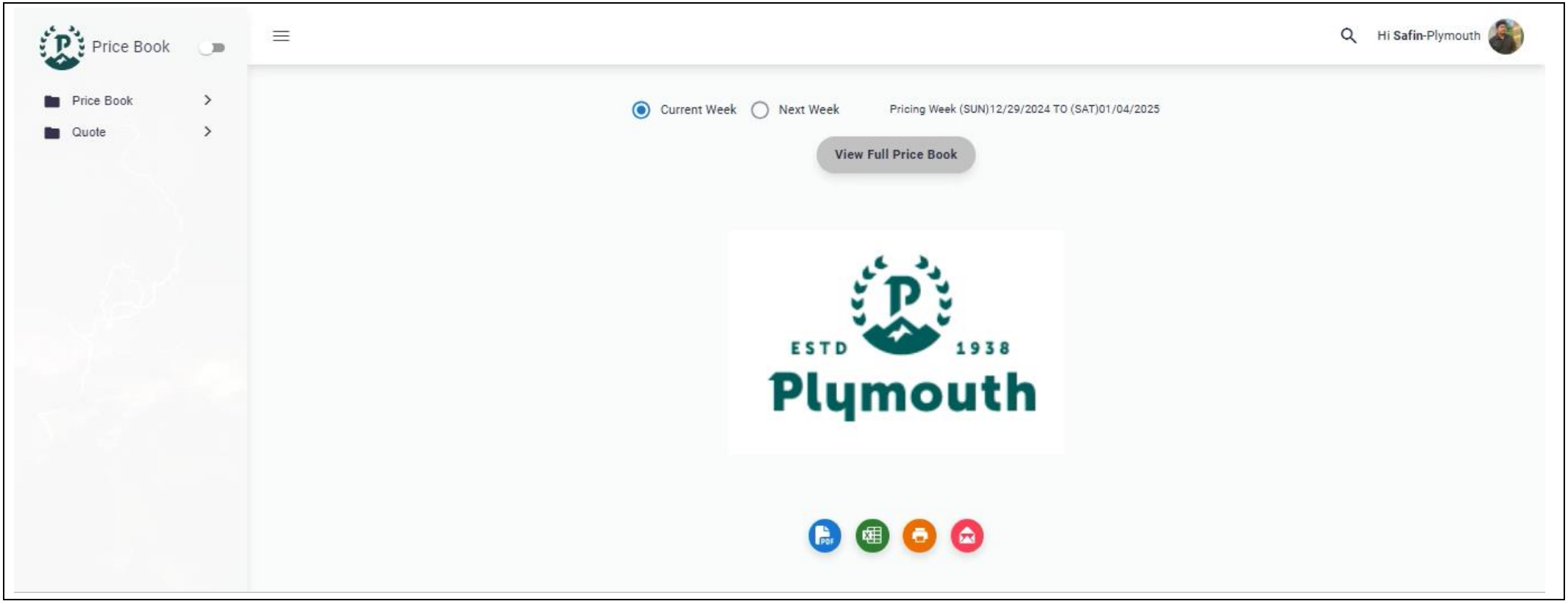
Storyboard



Spec Points

- Home Page
- Log Out* - All pages should have a Logout icon for users to log out of the site.
- Pricing Week 8/4-8/10/2024 (Drop Down Options.
- See Full Pricelist (Change it to See Full Price Book) - When clicked on this icon,
- the Full Price Book should be displayed on the same page. The Full Price Book is dictated by the date selected on the Pricing Week Dropdown.
- Search* Option (Top right-hand corner) -- Global Search of the website and it's functionalities. - In All Pages
- Return to Previous Page* - Option to return to the previous page - In All Pages
- Add to Favorites* - Option needed.
- Webpage Background (Modifiable) - i.e. Admins should be able to change this background
- Icons at the bottom of the page (PDF, Excel, Print,Email)— When clicked, the Full Price Book should be generated in that format and available for download. The Email Option should allow the user to email clients directly in PDF format, my default.
- Create auser-based email template
- Itzel's PortaTabs on the left side when they a user first log in

- Price Book
- Quote
- Price Book Directory
- Edit Price Book
- Price Book Template
- Specials
- Favorites
- Configure Price Book


Price Book
Price Book
Quote
Hi Safin-Plymouth
Current Week
Next Week
Pricing Week (SUN)12/29/2024 TO (SAT)01/04/2025
View Full Price Book
ESTD 1938
Plymouth

Test cases

We should ensure all the spec points and functional requirement areachieved.

Positive Test cases

- If user logged in it should allow to view generic Pricebook of the user's default company.
- If admin logged in it should allow to view generic Pricebook of the admin's selected company.
- Either User or admin we can only change current week or next week date.
- User or admin can add or remove this page in the favorite's collections.
- Admin will have provision to change selected company in settings

Negative Test cases

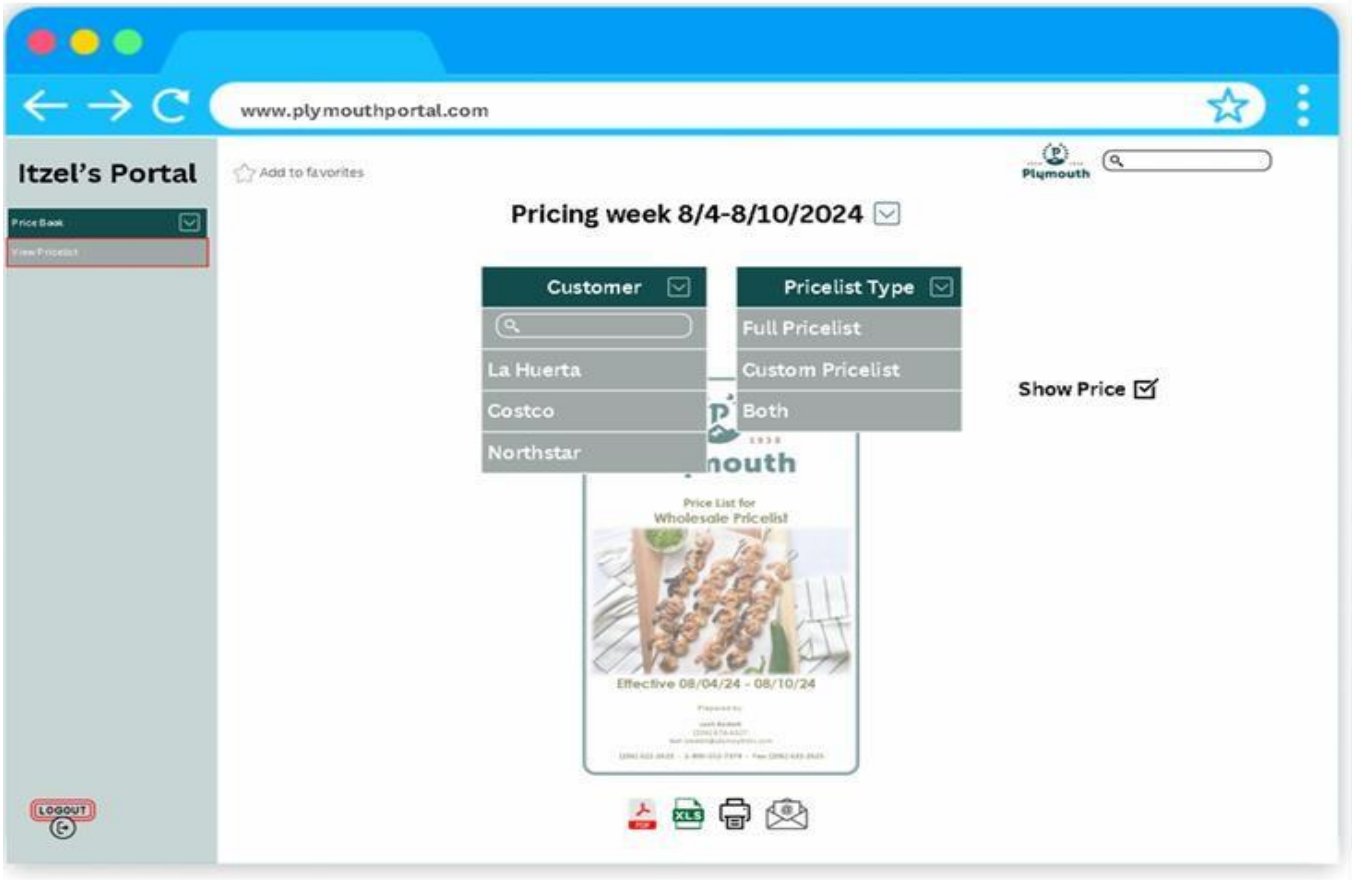
- User cannothave provision to changecompany in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Workflow

We ensure functional connectivity between screen as per business requirement.

Price book->Print Price book

Storyboard



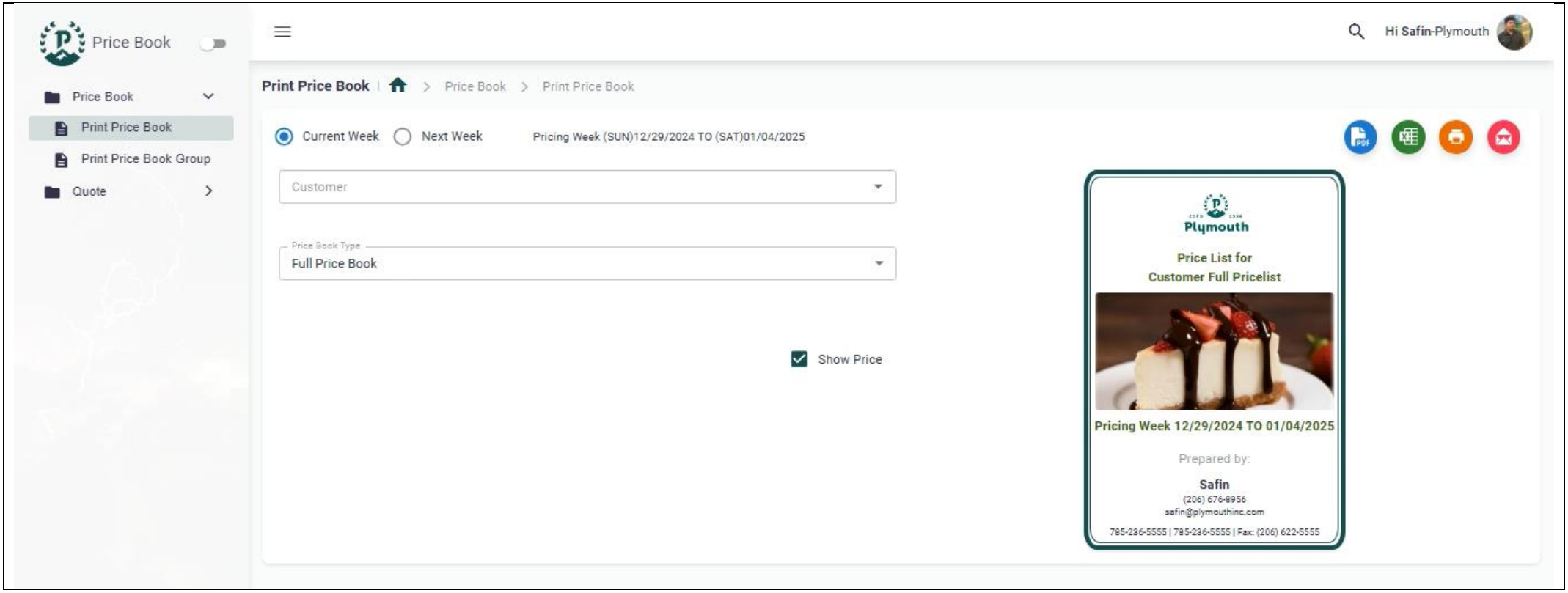
Spec Points

- Print Price Book
- Page where you can view the full, custom Price Book a customer receives
- Full Price Book (i.e. Customer Specific) - which is different from the Home Page Full Price Book.
- Show Price - Option to select a check box to show or hide pricing
- Icons at the bottom of the page (PDF, Excel, Print,Email)
- Pricing Week 8/4-8/10/2024 (Drop Down Option)
- The pricing week drop down should show the week of and upcoming week
- Customer Dropdown Menu
- Option to filter to a specific customerEx: La Huerta; Costco, NorthStar etc.,
- Price Book Type Dropdown Menu
- Option to choose a Price Book type by clicking the drop-down menu
- Build Custom Price Book Disable & Hide
- Change the name to "Print Price Book"
- Under the Price Book Type drop-down, remove the option "Both"
- On this page, remove "Edit Cover Page Image" option
- Price List Cover Page Preview – Make sure they are dynamic and shows the "Price List & Prepared by" based on the drop-down selection.
- When users log in, they need to view the home screen immediately without any delay. Change the name from Plymouth Full Price Book to "Prepare Full Price Book"
- When they click "Prepare Full Price Book," display a Progress Pop-Up Window. Then, display the icons below to download the Full Price Book (in PDF, Excel, etc. formats) and Grey Out the Prepare Full Price Book.

- Pop-up windows should not have the scroll-down bar. Minimize the size of the window & letter size and keep it consistent throughout the site.
- Price Book Directory – Remove/Hide
- Edit Price Book – Remove & Move this to the Amin Page
- Price Book Templates – Remove/Hide
- Specials – Remove & Move this to the Admin Page
- Favorites – Hide it for now
- Change the Popup when users click in Email Price Book(s) to “Customer(s) will receive their Price Book shortly”
- In Email Subject Change Generic Price Book to ”Plymouth Full Price Book”
- Mail Content “Plymouth Price Book for the Week(date) - Attached”
- In Some Popup Shows “Error: No Data Found” Take “Error”
- In Custom Price Book PDF Remove “Comments”, need to trim space for “Item#”, need to change “Pre Order” in to two lines
- In Custom Price Book PDFChange Fresh or FRZ to “FRS/FRZ”, Change Last Week Price to “LWP”, Change This Week Price to “TWP”, Change vs. Last Week to “Diff.”
- Customer full Price book need to do in Portrait now it is in Landscape

Full Price Book

Custom Price Book


Price Book
Price Book
Print Price Book
Print Price Book Group
Quote
Hi Safin-Plymouth
Print Price Book
Price Book
Print Price Book
Current Week
Next Week
Pricing Week (SUN)12/29/2024 TO (SAT)01/04/2025
Customer
Price Book Type
Full Price Book
Show Price
Plymouth
Price List for
Customer Full Pricelist
Pricing Week 12/29/2024 TO 01/04/2025
Prepared by:
Safin
(206) 676-8956
safin@plymouthinc.com
785-236-5555 | 785-236-5555 | Fax: (206) 622-5555

Testcases

We should ensure all the spec points and functional requirement areachieved.

Positive Test cases

- If admin or user logged in it should allow to selectFull Pricebook, Customer Price book or both Price book for the selected customer.
- If the admin or user wants to show a price in the document, they should simply tick the 'Show Price' icon to view the price in the price book for the selected customer.
- Either User or admin we can only change current week or next week date.
- User or admin can add or remove this page in the favorite’s collections.

Negative Test cases

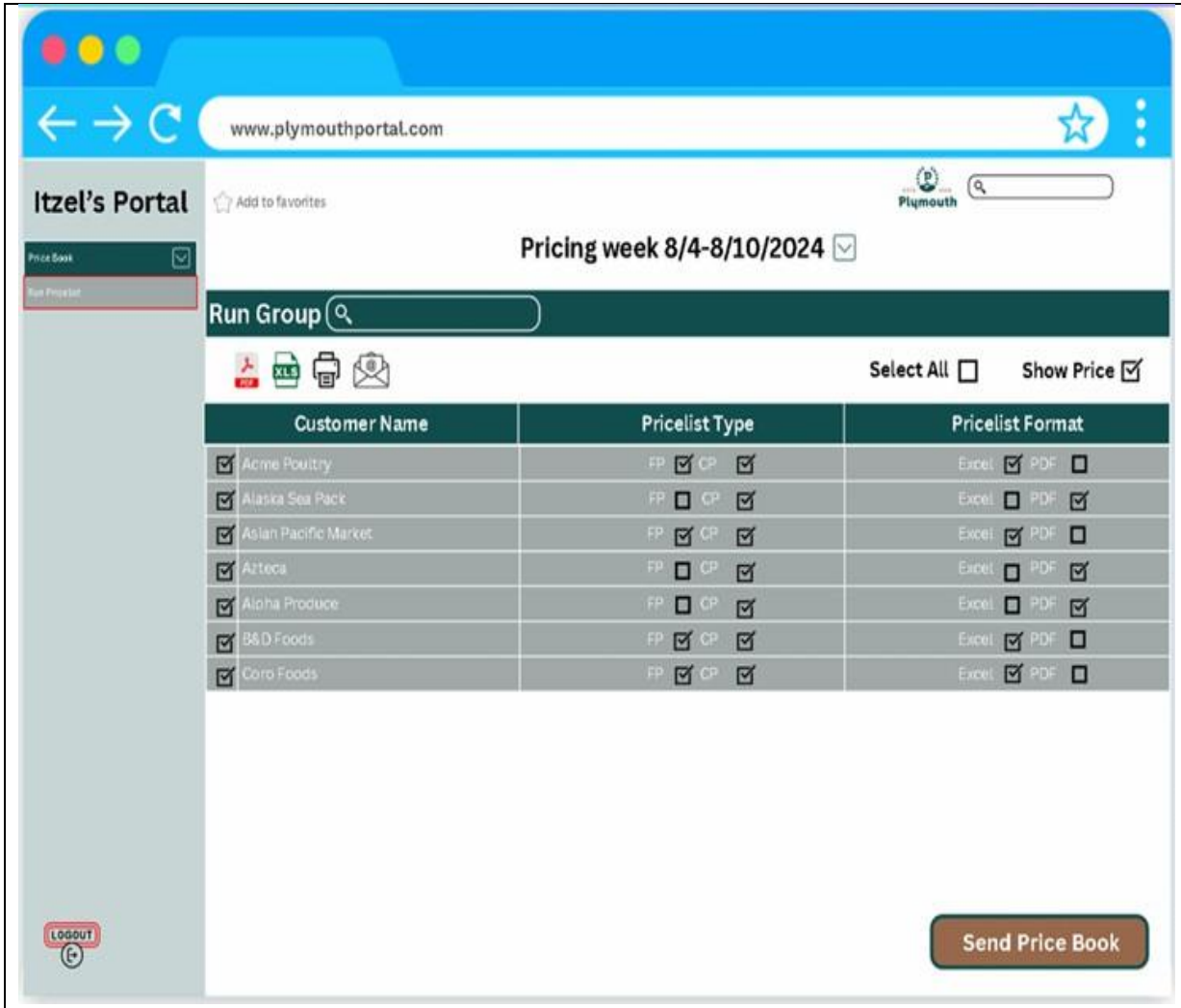
- User cannothave provision to changecompany in the settings
- User or admin gives invalid date range, it should be notified and restricted.

Workflow

We Ensurefunctionalconnectivitybetweenscreenasperbusinessrequirement.

Pricebook->RunPricebook

Storyboard

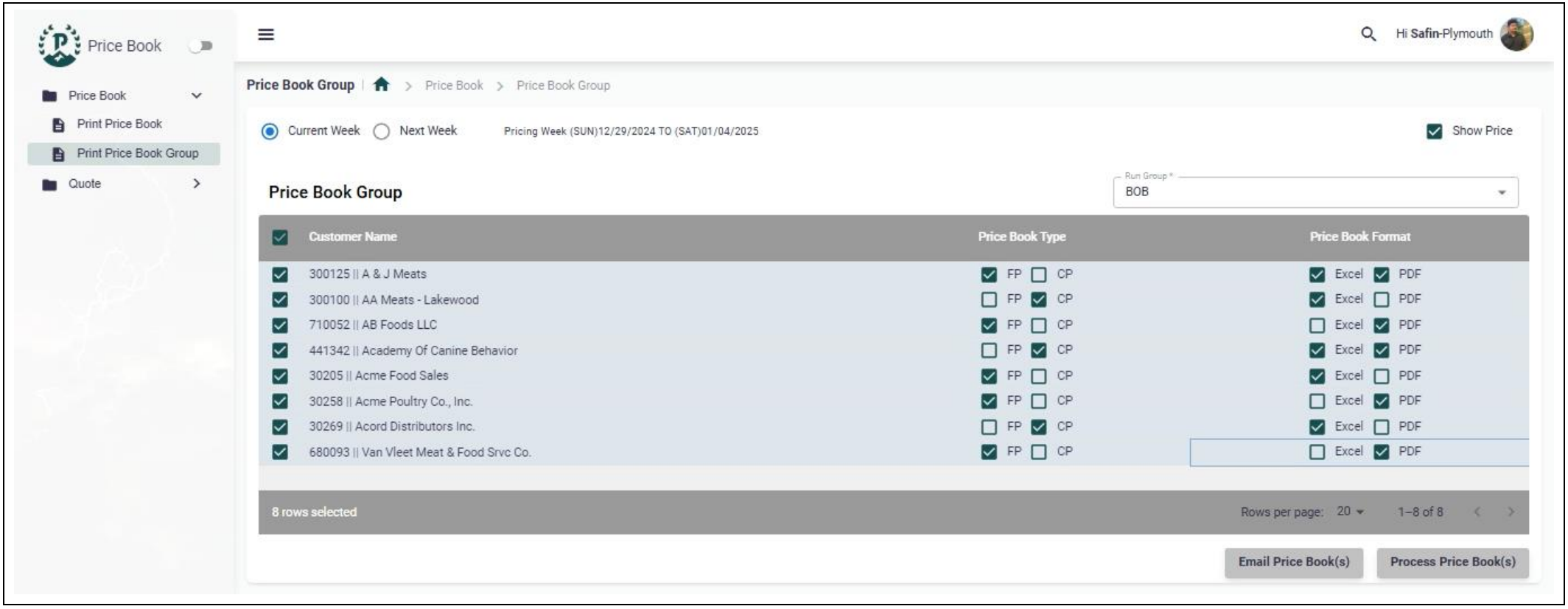


Spec Points

- Run Price Book
- Show Price - Option to select a check box to show or hide pricing

- Select All - Option to select all customers or specific customers
- Run Group Search Option
- The Run Group Search option should display the logged in user's Run Group by default. However, they should be able to search any Run Group
- Customer Name | Price Book Type |Price Book Format - Three Columns
- Customer Name
- Option to select any number of customers including a Selection All Option to select specific custom
- Price Book Type
- The Price Book type column is to select if the customer wants a (FP) Full Price Book, (CP) Custom Price Book, or Both
- Price Book Format
- Option to select the Price Book format (Excel, PDF or Both)
- Send Price Book Icon (Bottom Right-Hand Corner)
- This icon should allow users to send out Price Book to all customers via Email, Text Message or Both automatically based on the selected option
- Create Run Group Icon (For Admins only)
- Change the Run Price Book (Run Group) name to “Print Price Book Group”
- Change the “Run Group” title to “Price Book Group”
- Remove “Create Run Group”
- Make sure this page pulls the data from your “Price Book Configuration” Table in the Dev Database

	• Sync this data from "GP_CustomerRunGroupDistributions" table – that was provided by Shankar.


Price Book
Price Book
Print Price Book
Print Price Book Group
Quote
Hi Safin-Plymouth
Price Book Group | Price Book > Price Book Group
Current Week
Next Week
Pricing Week (SUN)12/29/2024 TO (SAT)01/04/2025
Show Price
Price Book Group
Run Group *
BOB
Customer Name
Price Book Type
Price Book Format
300125 || A & J Meats
300100 || AA Meats - Lakewood
710052 || AB Foods LLC
441342 || Academy Of Canine Behavior
30205 || Acme Food Sales
30258 || Acme Poultry Co., Inc.
30269 || Acord Distributors Inc.
680093 || Van Vleet Meat & Food Srvc Co.
FP
CP
Excel
PDF
8 rows selected
Rows per page: 20
1–8 of 8
Email Price Book(s)
Process Price Book(s)

Testcases

We should ensure all the spec points and functional requirement areachieved.

Positive Test cases

- If admin or user logged in it should display the logged-in user's Run Group by default.
- If user or admin should be able to search for any Run Group and have the option to select any number of customers.
- The 'Price Book Type' column allows users to select whether the customer wants a (FP) Full Price Book, (CP) Custom Price Book, or both.
- If admin or users can also select the Price Book format (Excel, PDF, or Both).
- If the admin or user wants to show a price in the document, they should simply tick the 'Show Price' icon to view the price in the price book for the selected customer.
- Either User or admin we can only change current week or next week date.
- User or admin can add or remove this page in the favorite’s collections.

Negative Test cases

- User or admin gives invalid date range, it should be notified and restricted.

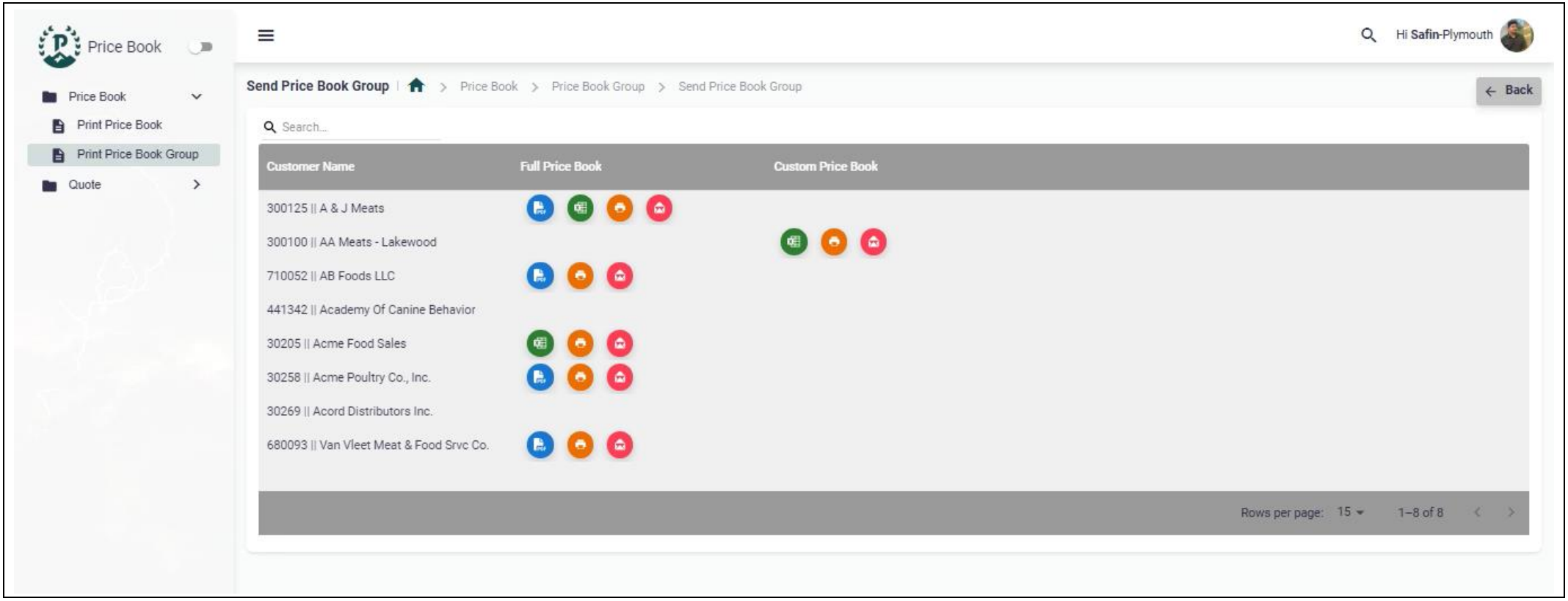
Work flow

We Ensure functional connectivity between screen as per business requirement.

Pricebook->RunPricebook->SendPricebook

Storyboard

NotReceived	SpecPoints •


Price Book
Price Book
Print Price Book
Print Price Book Group
Quote
Hi Safin-Plymouth
Send Price Book Group
Price Book > Price Book Group > Send Price Book Group
Back
Search...
Customer Name
Full Price Book
Custom Price Book
300125 || A & J Meats
300100 || AA Meats - Lakewood
710052 || AB Foods LLC
441342 || Academy Of Canine Behavior
30205 || Acme Food Sales
30258 || Acme Poultry Co., Inc.
30269 || Acord Distributors Inc.
680093 || Van Vleet Meat & Food Srvc Co.
Rows per page: 15
1–8 of 8

Testcases

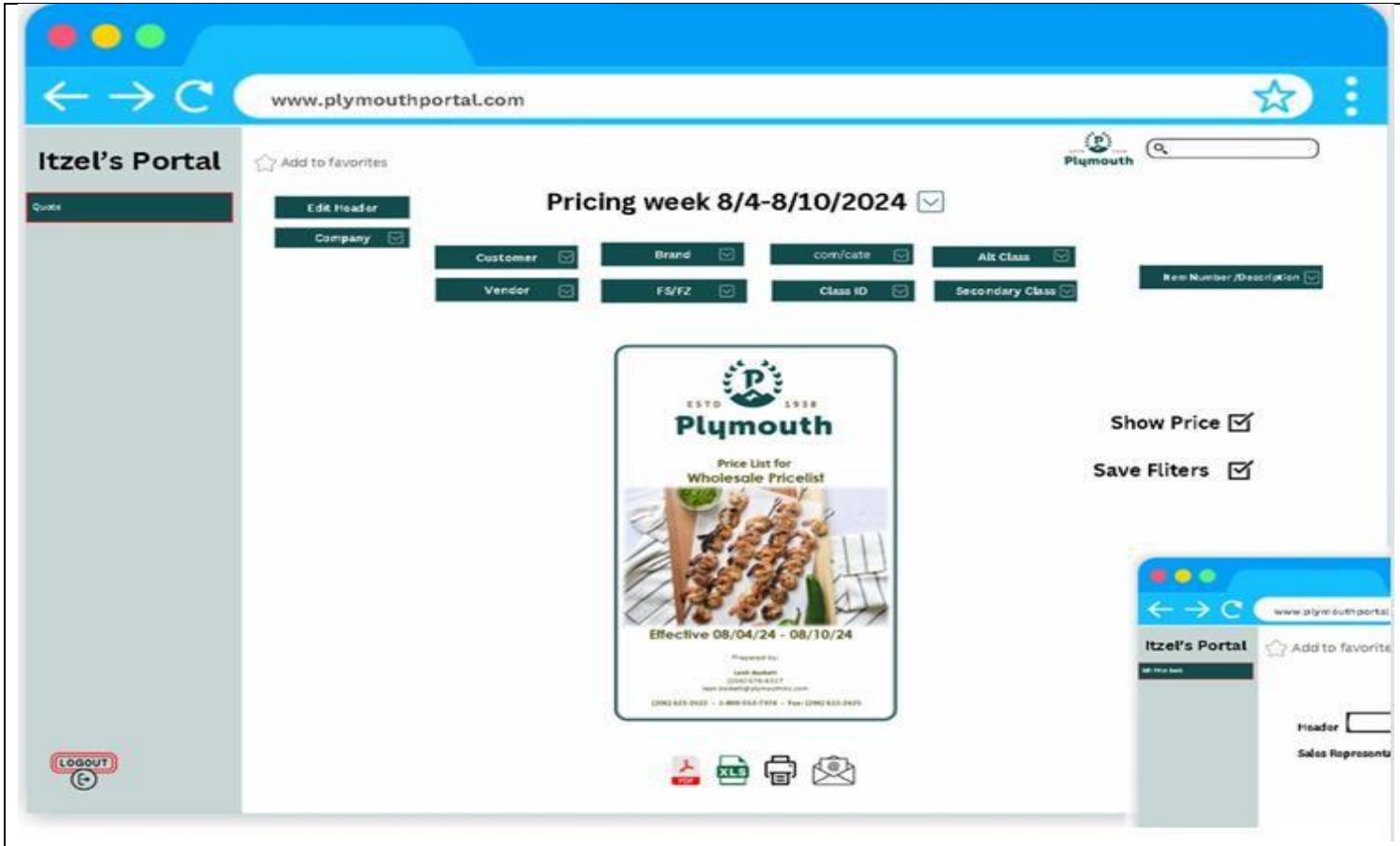
We should ensure all the spec points and functional requirement are must to be achieved

Work flow

We Ensure functional connectivity between screen as per business requirement.

Quote

Storyboard

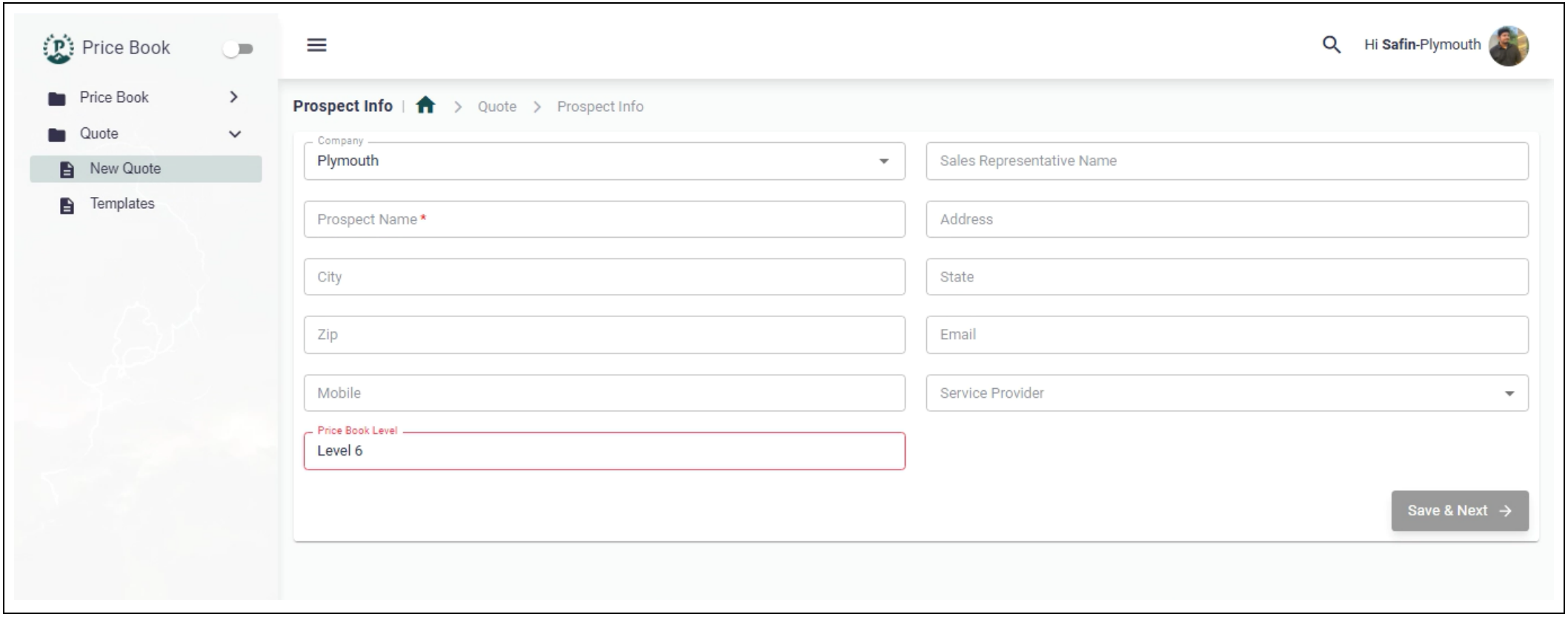


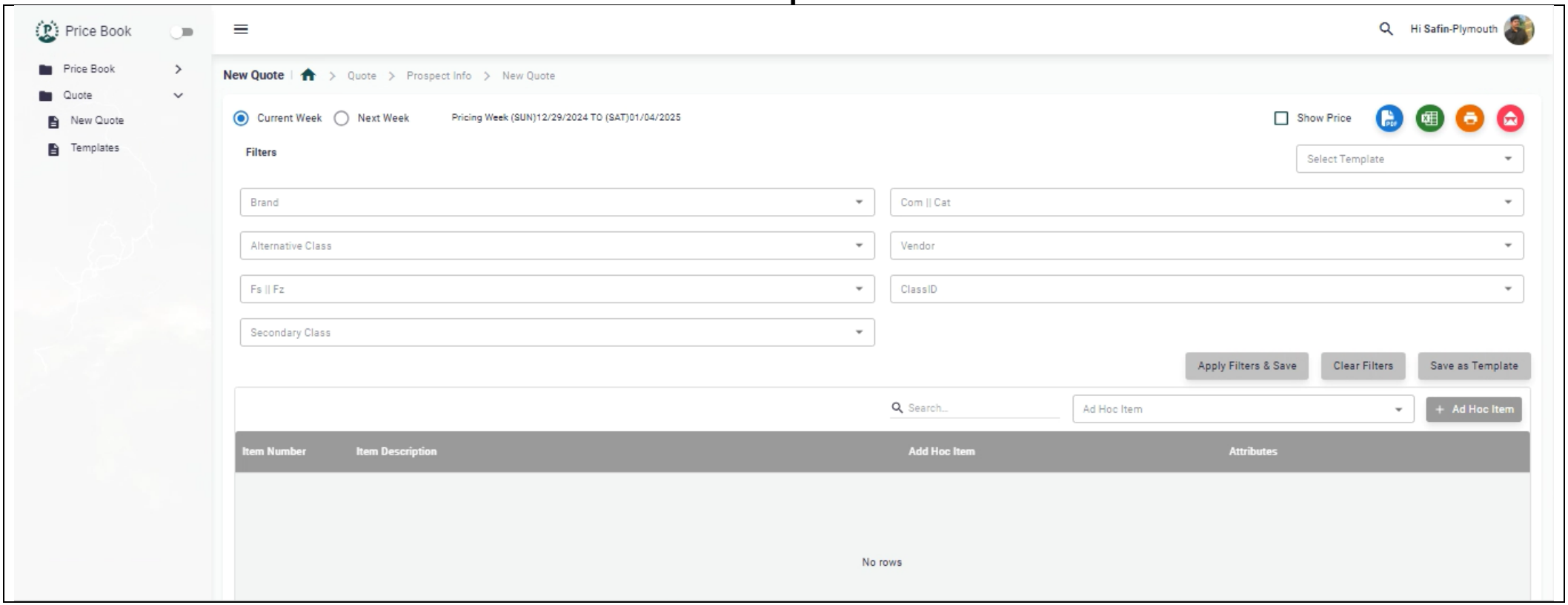
SpecPoints

- Quote
- Search Option (Top right-hand corner) -- Global Search of the website and its functionalities.
- Add to Favorites - Option needed
- Background Price Book Cover Icon with no dates.
- Show Price - Option to select a check box to show or hide pricing
- Save Filters - Option to save current filter settings if desired
- Icons at the bottom of the page (PDF, Excel,Print,Email)
- Edit Header Icon - Option for any users to change the Header/Title and the Sales Person's Name on the Quote. Clicking on this tab should redirect the user to the "Edit Price Book" page to modify the Header & Sales Reps info
- Company Dropdown Menu - Option to change the Company Names between Plymouth, NickyUSA and S&J and be able to quote with the appropriate logo - Only for the Admin.
- Build Quote Icon (Bottom Right-Hand Corner) - to build a Custom Quote with the selected filters
- The edit header button is to edit the header and sales persons name - for all users
- The Quotes are only for new customers
- Use this:
- Company Sales Representative Name
- Prospect Name Address 1
- City State
- Zip Email
- Mobile Service Provider (Should be a drop-down option to choose "AT&T, Verizon, T-Mobile")

	• Add & Display the Company's default "Price Book Level" – in RED - on this page. Make sure they are greyed out (Users should not be able to Edit). • Left align the "Current Week, Next Week" Radio Button • Filters Select Template Show Price • Add "Clear Filters" button to the right of "Apply Filters" button -- to clear all selected filters. • Exclude Item Number "Unknown" from your dataset. • When clicking on this option, change the name from Quote Form to "Prospect Info" • Phone Number – make sure to include Mobile Service Provider • On the Quote Page (next page) • Remove the "Price Book Level" filter on this page. Instead, we will be using the Company's Default Price Level. • Add an option to select an existing Template (drop-down) on the far-right side of the Filters title in the top right-hand corner. • At the bottom right-hand corner, add a "Save as Template" button before the Apply Filters button. • All items should be selected by default when users click the Apply Filters button. • Add a data grid below to display the list of items based on the applied filters. Users should have the option to Include OR Exclude an item on this screen. • Next to Search, add an "Add Ad-hoc items" option. • **Templates** – Add (This is the current Quote Templates) • On the Quote Page • Edit Cover Page Image – Remove this option • Process – Change the name to "Apply Filters" • Customer – Remove this option since this Quote option is for a new Customer. • Display an option to choose a Price Level as a filter on this page.

	• Add a data grid below to display the list of items based on the applied filters. Include an option to Print OR Exclude an item while printing.


Price Book
Price Book
Quote
New Quote
Templates
Hi Safin-Plymouth
Prospect Info | Quote > Prospect Info
Company
Plymouth
Sales Representative Name
Prospect Name *
Address
City
State
Zip
Email
Mobile
Service Provider
Price Book Level
Level 6
Save & Next


Price Book
Price Book
Quote
New Quote
Templates
Hi Safin-Plymouth
New Quote
Quote
Prospect Info
New Quote
Current Week
Next Week
Pricing Week (SUN)12/29/2024 TO (SAT)01/04/2025
Show Price
Filters
Select Template
Brand
Com || Cat
Alternative Class
Vendor
Fs || Fz
ClassID
Secondary Class
Apply Filters & Save
Clear Filters
Save as Template
Search...
Ad Hoc Item
Ad Hoc Item
Item Number
Item Description
Add Hoc Item
Attributes
No rows

Testcases

We should ensure all the spec points and functional requirement are achieved.

Positive Test cases

- If admin or user want to print a Quote Pricelist with filters select a customer then choose the filter you want to apply to the document.
- If the admin or user wants to show a price in the document, they should simply tick the 'Show Price' icon to view the price in the price book for the selected customer.
- Either User or admin we can only change current week or next week date.
- User or admin can add or remove this page in the favorite's collections.

Negative Test cases

- User or admin gives invalid date range, it should be notified and restricted.

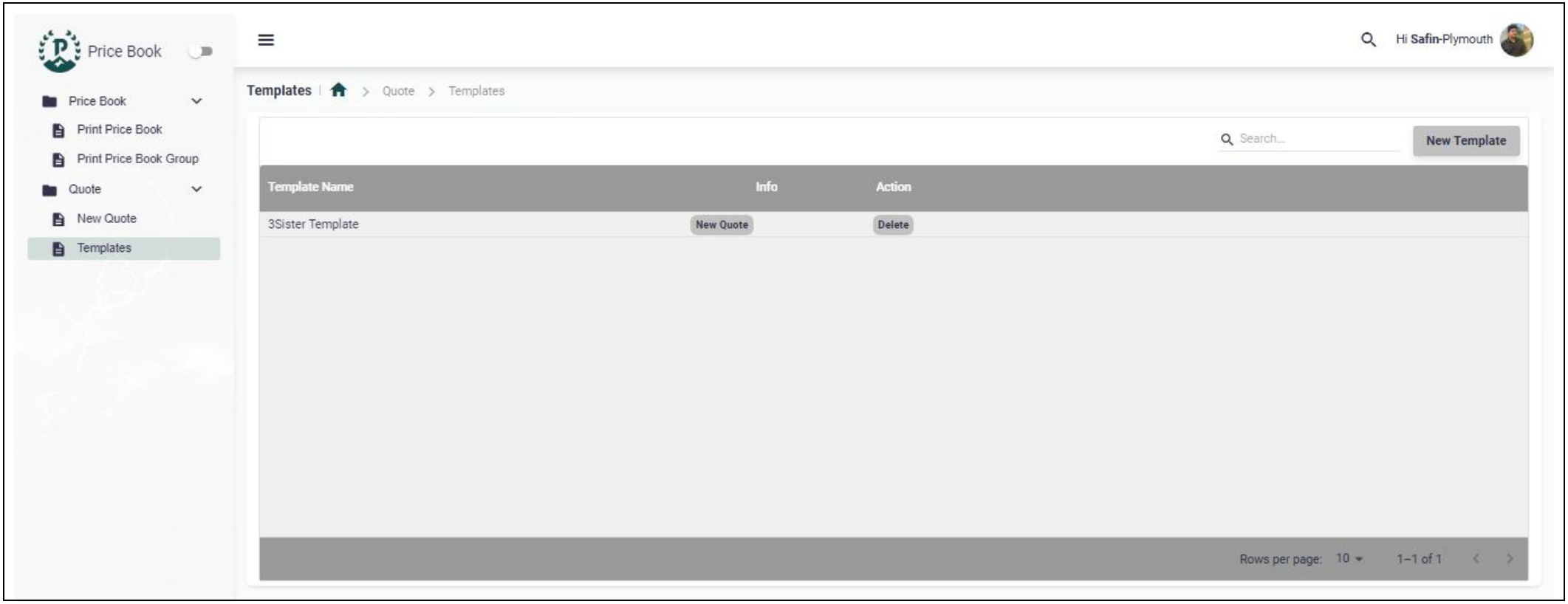
Work flow

We Ensure functional connectivity between screen as per business requirement

QuoteTemplate

Storyboard

NotReceived	SpecPoints •


Price Book
Price Book
Print Price Book
Print Price Book Group
Quote
New Quote
Templates
Hi Safin-Plymouth
Templates
Quote
Templates
Search...
New Template
Template Name
Info
Action
3Sister Template
New Quote
Delete
Rows per page: 10
1–1 of 1

Testcases

We should ensure all the spec points and functional requirement areachieved.

Positive Test cases

- If admin or usercan see the already saved quote templates and if we no longer want a template, we can delete it.
- If admin or user pressing the 'View Quote' button, the saved templates that match the saved filters will be displayed.
- If admin or user wants to delete an unwanted template, simply click the 'Delete' button. A popup will appear asking if you want to delete the template. If you click the 'Confirm' button in the popup, the template will be removed from the Quote Templates screen.
- User or admin can add or remove this page in the favorite's collections.

Negative Test cases

Work flow

We Ensure functional connectivity between screen as per business requirement.

Detailed Functional Specification Document

Plymouth

22 30th st NE ,Auburn,WA 98001,United states

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Beyondex Solutions Private limited

#25/31,Lakshmi Nagar,2nd Mainroad,Porur,chennai-600 116,Tamilnadu,India