**Revision History & Approval**

***Revision***

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***Approval***

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### Purpose of Document

This solution design (SD) is prepared based on the basis of requirements identified during the analysis phase.

* To ensure that requirements for the software product are defined and understood
* Requirements are documented and controlled to establish a basis for software development and project management use
* Changes to requirements are documented and controlled to ensure that plans, deliverables, and activities are consistent with requirements

The SD will be used to:

* For Development team develop software including software components, software system according standards and defined requirement
* For Quality Control team plan, design and test software products to ensure that
* Requirement have been fulfilled
* Defect have been found and resolved before delivery
* For Support Center, Implementer, End User understand what the requirement is and how to use the system.

### Overview

Below is the table mapping between user roles and systems will show the report

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| No. | Users | Core DMS | eTool | SFA | BI |
|  | Sales Rep |  |  | X |  |
|  | Distributor | X | X |  |  |
|  | Sales Sup | X | X |  |  |
|  | ASM/RSM/NSD | X | X |  |  |
|  | Sales Operation | X | X |  | X |
|  | Trade Marketing | X | X |  | X |
|  | BOD |  |  |  | X |

There are 5 kinds of report in DMS

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| No. | Report type | Data | Description | Core DMS | eTool | SFA | BI |
|  | Printed forms | Real time | Transactions in core DMS   * PO receipt from vendor * PO return to vendor * Receipts * Issues * Stock counting * Stock transfer * Delivery note * Delivery note by outlet * Van-sales * Direct sales * Return note from outlet * Picking list by delivery man * Return note from delivery man * Request goods from sales rep * Return goods from sales rep | X |  | X  Van-sales |  |
|  | Master list | Real time | Show all information of   * customers * sales team * products * routes | X | X |  |  |
|  | Operation report   * Template: fixed form * Time: daily/weekly/monthly | Real time | Sales   * Revenue order/deliver * Volume order/deliver * Customer balance * ASO   Inventory   * Real time, * In-out by warehouse with sell and free items * In-out by sales with sell and free items * Historical inventory transactions   Purchase   * Revenue order/deliver * Volume order/deliver * Vendor balance   KPI   * KPI monitoring   Display   * Display program tracking * Display incentive tracking   Accumulation   * Accumulative program tracking * Accumulative incentive tracking   Promotion   * Promotion by order * Promotion by scheme   POSM   * POSM tracking * POSM assessment   Sales Compliance   * Visit * Synchronization * Work week * mancherdise, POSM, display pictures | X | X |  |  |
|  | Management report   * brainstorm to define template | Baseline | * Distribution activities * Sell in & sell out * Summary promotion program * Analysis promotion program * Tracking sales KPI | X | X |  |  |
|  | Analysis Report (baseline)   * MTD / last MTD * YTD / last YTD * Trends | Raw data | * Sell-in * Sell-out * KPI * Inventory * Compliance |  |  |  | X |

**Filter Rule for operation report**

* **Time type (1): Mandatory, default value is today**
  + **By Date:** user can select from date and to date to view report
  + **By Week:** user select the week to view report
  + **By Month:** user select the month to view report
* **Salesforce** **(2): Optional** 
  + If user login is assigned to many salesforces, they can select one or multiple salesforce, default value is all salesforces
  + If user login is assigned to one salesforce, they can select the level of their assignment (Country🡪Region🡪Area🡪Distributor🡪Route) or lower, default value is level of their assignment
  + If user login is not assigned to any salesforce, this field will be blanked, default value is blank
* **Geography (3): Optional** 
  + If user login is assigned to many/one salesforces, they can select one or multiple geography (Country🡪Region🡪Province🡪District-🡪Ward) which belong to their salesforce assignment or lower, default value is all geography
  + If user login is not assigned to any salesforce, this field will be blanked, default value is blank
* **Customer (4): Optional and the value will be limited by salesfoce and geography** 
  + **By Hierarchy:** user can select one or multiple hierarchy (Distribution channel🡪Distribution sub channel🡪Outlet format) to view report
  + **By Attribute:** user select one or multiple attribute (Display class, Loyalty class, Sales level, Location, Area)
  + **By Customer ID:** user select one or multiple customer id and the list of customer will be limited by hierarchy and attribute
* **Product (5): Optional, default value is blank** 
  + **By Hierarchy:** user can select one or multiple hierarchy (Category🡪Sub category🡪Brand🡪Sub brand) to view report
  + **By Attribute:** user select one or multiple attribute (Principal, Form usage, Size, Variant) to view report
  + **By Product ID:** user can select one or multiple product id and the list of product will be limited by hierarchy and attribute
* **Warehouse (6): Optional, default value is blank** 
  + If user login can access to many warehouses, they can select one or multiple warehouse, default value is all warehouses
  + If user login only access to one warehouse, the value is that warehouse
  + If user login desn not access to any warehouse, this field will be blanked, default value is blank

**Business Rules**

* The date to show the data on report can be filtered by order date/ delivery date/ invoiced date
* There are two kinds of data level in report:
  + Distributor: only see data of one distributor and the filters are (1), (4), (5), (6)
  + HO: can see data of multiple distributor base on their assignment and the filters are (1), (2), (3), (4), (5)
* With sales revenue order/deliver data depend on user role will have different report format
  + Distributor/Sales Sup: the revenue of each outlet of one sales rep will be one page
  + ASM: the revenue of each sales rep of one Sales Sup will be one page, if ASM want to view revenue of outlet, they should click on the sales rep to view the detail
  + RSM: the revenue of each sales sup of one ASM will be one page, if RSM want to view revenue of sales rep, they should click on the sales sup to view the detail
  + NSD: the revenue of each ASM of one RSM will be one page, if NSD want to view revenue of ASM, they should click on the ASM to view the detail
* Report can be configurable to
  + Allow or not allow export report data to excel/pdf file
  + One page report can be set 10, 20, 30, 50, 100 rows
  + Sum value of each column in report can be configure on header or footer
* When user view historical data, then these below historical information must be captured if there is any changes. For example,
  + Salesforce: in June Sales Sup assigns to HCM1 area, July Sales Sup assigns to MD1 area
  + Geography: merge two provinces Ha Noi and Ha Tay become to one Ha Noi
  + Customer: change name, attribute, hierarchy
  + Product: change name, attribute, hierarchy
  + Distributor: change name
  + Warehouse: change name

### Report Lists

#### Printed forms

#### Master list

#### Operation report

#### Management report

#### Analysis report (BI)