Technical Document – Annexure I
of
Neotric Platform Website

Contents

Annexure I

1. Project Overview

✓ **Business Need**

Client needs a website where end users can buy products & developers can create a project to add particular products. Admin will manage the whole platform from the backend.

✓ **Solution Suggested**

We will build a website where end users can buy products, developers can create a project to add particular products and chat with admin for negotiation.

✓ **Stakeholders**

Actor	Task
End User	Can buy products form the website.
Developer	Can create a project by adding different products
Admin	Manage whole platform from backend

✓ **Project Scope and Development Deliverables**

This project scope comprises of the following components to deliver:

- Design and Development of Website
- Development and Integration of API
- Development of Admin Web Panel

2. Technologies

Development Phases		Tools & Technology
Requirement Gathering and Analysis	Proposal Drafting, SRS Writing and User Flow Diagram	Microsoft Office Word 2019 / Microsoft Office Presentation 2019 / Microsoft Office Vision 2019
	Wire Framing	Axure / UiZard
Development	Frontend	HTML/CSS & Bootstrap
	Web Backend	Node.js / PHP (Laravel)
	Database	MongoDB / MySql
	Browser	Google Chrome, Safari, Mozilla Firefox
Quality Assurance & Testing	Test Cases	MS Office Excel 2019
	Testing	Manual

3. Features and Scope of Work

➢ **User flow for End Users**

- **Sign Up / Register Page**

  o Users will be able to register on the website by providing below details:-
    ▪ Full Name
    ▪ Email id
    ▪ Password and Confirm Password.
    ▪ Terms and Conditions checkbox
    ▪ Users will receive an OTP over his/her email id for verification.
    ▪ Option to Sign In - If already registered.

- **Login Page**

  o Users will be able to Login into the website using below details:-
    ▪ Email id
    ▪ Password
    ▪ Forgot Password Hyperlink
    ▪ Register - If account does not exists.

- **Forgot Password**

  ▪ This option would be used by users in case they forgets their password.

  ▪ They need to enter the e-mail Id on which the password reset link would be sent to reset the password.

- **Home Page:**

  ▪ When user lands on the homepage, will see list of products.

  ▪ Categories will be there like trending products, top deals & recently viewed.

  ▪ On selecting the product it will redirect to product details page.

- **Search and Filter Products:**

  ▪ Enter platform and initiate search.

  ▪ Apply filters such as name, brand, SKU, color, etc.

  ▪ Browse through search results.

- **Product Selection:**

  ▪ Click on a product for detailed information.

  ▪ Add selected products to the shopping cart.

- **Order History:**

  ▪ User can see all the order's history.

- **Checkout Process:**

  ▪ Access shopping cart.

  ▪ Review selected items.

  ▪ Proceed to checkout.

  ▪ Enter shipping details.

  ▪ Apply discount codes if available.

  ▪ Choose delivery options.

  ▪ Option to schedule delivery, date/time calendar will pop-up.

  ▪ Select payment method (PayPal, credit card).

  ▪ Confirm and place order.

- **Order Tracking:**

  - Receive order confirmation.
  - Access order tracking with Purolator.
  - Receive notifications for delivery updates.

➢ **User Flow for Building Developers and Designers:**

- **Sign Up / Register Page**

  o Users will be able to register on the website by providing below details:-
    - Full Name
    - Email id
    - Password and Confirm Password.
    - Terms and Conditions checkbox
    - Differentiate between regular customer and building professional account.
    - On selection of building professional, it will require specific details like description, budget range, experience, etc.
    - Users will receive an OTP over his/her email id for verification.
    - Option to Sign In - If already registered.

- **Login Page**

  o Users will be able to Login into the website using below details:-
    - Email id
    - Password
    - Forgot Password Hyperlink
    - Register - If account does not exists.

- **Forgot Password**

  - This option would be used by users in case they forgets their password.
  - They need to enter the e-mail Id on which the password reset link would be sent to reset the password.

- **Home Page:**

  - Search
  - My projects.
  - My Catalogue.
  - Book appointment.
  - Business Analytics.
  - Notification from admin regarding configured pricing.

- **My projects**

  - By selecting this option there will be list of projects and an option to create a new project.
  - Different tabs will be there for each project.
  - Search option between the projects.

- **My catalogue**

  - Catalogue needs to be updated every 3 month.
  - Notification will be sent for the same.

- **Book Appointment**

  - By this option developer can book an appointment to visit the store.
  - There will be a calendar to do the same.
  - Appointment history will be shown.
  - On approval from admin will receive a notification Appointment confirmed.
  - Will be marked green.

- **Project Creation and Labeling:**

  - Access dashboard after login.
  - Create new projects under client profiles.
  - Label projects for organization.

- **Product Selection for Projects:**

  - Utilize enhanced search and filtering.

  - Add products to specific projects.

- **Pricing Configuration and Checkout:**

  - Request configured pricing.

  - On approval it will open the chat feature for the particular project.

  - There will be an option for admin and developer to chat for pricing.

  - Apply discount codes.

  - Option to upload documents.

  - Input budget and lead time for each project.

  - Proceed to checkout and payment.

- **CRM Dashboard and Document Upload:**

  - Access CRM dashboard.

  - Monitor pipelines, budgets, and accumulated spend.

  - Upload documents to client profiles.

- **Order Management:**

  - Manage orders under specific projects.

  - Monitor deposit and customer credit.

  - Save payment details and shipping information.

  - Track order status and receive delivery notifications.

- **Reports and Analytics:**

  - Create reports for orders, pipeline, and budget.

  - Access analytics for website deals and campaigns.

- **Communication and Appointments:**

  - Access customer communications tool portal.

  - Receive deal and reduced pricing campaigns.

Note:- Integration of Hubspot and QuickBook.

3.1. Administrator Web Panel

The back end of the platform will be power packed with an administrative panel to manage the updates of data at the website level and as well as back end.
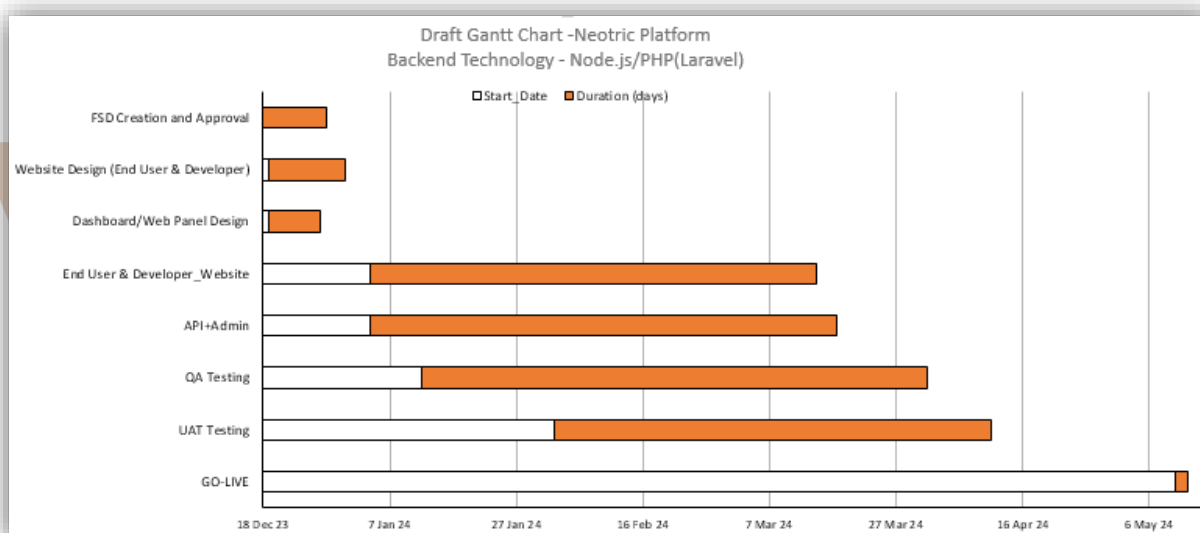
Following would be the key functionalities:

- **User Management:**

    ▪ Create and manage user accounts.

    ▪ Reset passwords and manage access.

- **Product Management:**

    ▪ Add, edit, and remove products from the catalog.

    ▪ Update product information.

- **Order Management:**

    ▪ Monitor and manage all customer orders.

    ▪ Process and fulfill orders.

    ▪ Match customer orders to supplier purchase orders.

- **CRM Integration and Document Management:**

    ▪ Monitor and manage CRM data.

    ▪ Access and update client profiles.

    ▪ Review and manage document uploads.

- **Appointment Management:**

    ▪ Admin will approve the appointments.

- **Discount Code and Payment Management:**

    ▪ Create and manage discount codes.

    ▪ Monitor and manage payment transactions.

- **Delivery Management and Customer Communication:**

    ▪ Track delivery status.

    ▪ Approve developer project.

- On approval can manage their projects by removing and adding products.
- Can exchange docs on the project chat option,
- Coordinate with developers.
- Communicate with customers regarding orders.

- **Reporting and Analytics:**

  - Generate reports on product sales, order trends, etc.
  - Analyze CRM data for customer relationships.

- **Content Management and User Analytics:**

  - Manage content on the platform.
  - Monitor and analyze user interactions.

- **Platform Customization and Audit Trail:**

  - Customize platform features.
  - Maintain an audit trail of key actions.

4. Draft Delivery Timeline and Gantt Chart

Backend Technology - Node.js / PHP (Laravel)	
Development Start Date	Development End Date
18-Dec-23	13-May-24
Total Project Effort (in person days)	164

Draft Gantt Chart -Neotric Platform
Backend Technology - Node.js/PHP(Laravel)

*Project Duration would be met with a condition that the client responses are received on time.

5. Project Management

Before Project is awarded			
Business Analysis	**Project Management / Software Development**	**Business Development / Sales**	**Accounting**
1. Project Identify / Analysis 2. Develop one-page proposal overview 3. Create project management overview 4. SHIRLEY assigned to business manager GBM *GBM: Global Business Manager*	5. Project Evaluation by technical teams 6. Introduction call 1 on 1 interaction with SHIRLEY 7. System appropriate services determined 8. Requirements / System application architecting 9. Project needs analysis 10. Detailed proposal development 11. Cost and Time effort estimation	12. Introduction call 13. Deliverables discussed with SHIRLEY 14. Milestones discussed 15. Project success discussed 16. Future growth alignment 17. Detailed proposal provided 18. Payment instructions	19. Invoice submitted to SHIRLEY 20. Payment received 21. Payment confirmation sent to SHIRLEY 22. Account forwarded to PM

After Project is awarded			
Phase 1	**Phase 2**	**Phase 3**	**Phase 4**
1. Project manager assigned 2. Project initiation/ introduction call 3. Online project profile created 4. Weekly project meetings scheduled 5. Reporting formats explained to SHIRLEY	6. Design, Development / technical teams assigned 7. Project start 8. SHIRLEY feedback on weekly 9. Weekly project feedback session- 30 min 10. Reports available on-line 11. Online Rebel catering access of PM system application	12. Testing / Quality Assurance 13. Live server testing 14. Final bugs issues fixed 15. Campaign completed	16. Periodic project maintenance 17. Data backups 18. Web site – System application upgrades 19. On line marketing ** Optional

6. Proposed Team of Project

The proposed team to achieve the deliverables in a time span of 33 Business Weeks comprising of 40 hrs./week is as follows

Designation	Availability
Project Manager	Part Time
Project Expert	Part Time
Designers	Full Time
Developers	Full Time
Quality Analyst	Full Time