**Beejak Use Cases**

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Confidentiality: confidential

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**1 General**

This document describes the use-cases of website functionality for the project team before and during the development, testing and service delivery.

**1.1 Purpose of this document**



The main purpose of this document is to document all use-cases of functionality envisioned for kalakar.pro and how to implement each and every functionality.

**1.2 Correct use of this document**



This document shall be used as follows:

This document template has been designed by the Kalakar Technical Project team as a part of the internal documentation process.

The document is designed to be followed by the all the stakeholders (Business Team, Marketing Team, Management Team and Other heads).

**1.3 References**



This document uses Beejak Invoicing Module wireframes.pdf as referenceExcept Refer Code all fields are required

***Invoices – Landing/Home page***

Site User: Wants to keep track of invoices raised and expenses incurred

Kalakar: Wants to provide facility to site user to raise and keep track of all their invoices, and keep track of expenses incurred under various heads and accounts.

**Pre-conditions:** ​User is on the app

**Success Guarantee (Post-conditions):** ​User is displayed the landing page of the invoices module.

**Main Success Scenario (or Basic Flow):**

1. User clicks on the link for invoice section.
2. Landing page of the invoice module is displayed.
3. User sees the following actionable links on the page:

3.1. Create a new Invoice

3.2. Past Invoices/Drafts

3.3. Track Payment Dues

3.4. Accounts Overview

3.5. Record Expenses

3.6. View Past Expenses

3.7. Accounts Settings

3.7.1. For non-logged in user: user will be assigned Guest account settings by default. India and English will be default language for guest profile. User can change it as required.

3.7.2. Display Register and Sign In buttons on top

3.7.3. Profile Name: Guest user will be default for non-signed in and first time user

3.7.4. Add Profile: Option to Add a new profile, Currency and country for the profile. To be active only if the user is signed In

3.7.5. App settings

3.7.5.1. Select language: default will be English for the non-logged in or first time user. User can select any option from the list of provided options.

3.7.5.2. Your Payments: For managing subscriptions. To be active only if the user is signed in

3.7.5.3. Edit Your Basic details: For user to be able to update his/her basic details provided during Register process

3.7.5.3.1. User can see the status of email verification

3.7.5.3.2. User can request for resending email id verification email

3.7.5.3.3. User can update name, email, phone and password

3.8. Link to Terms of user and Privacy Policy

**Special Requirements**

1. First time user or non-logged in user will be treated as Guest user and will use Guest profile, having India as default Country and English as default language. Guest user will have the option of changing it as per their requirement. In future, we can auto-detect country as we start supporting other countries, for the first time user or non-logged in user
2. User will also have button to Sign Up or Sign In this section
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice***

1. Site User: wants to create own invoice template for raising new invoices.
2. Kalakar: Wants to enable user to create and track their invoices using the Invoices module or new users be able to experience all functionality offered by the application without any hindrance

**Pre-conditions:** ​User is on the site. User can be logged in or non-logged in

**Success Guarantee (Post-conditions):** ​User is able to create a new invoice, for logged in user. or beable to experience invoice making process, for non-logged in user

**Main Success Scenario (or Basic Flow):**

1. User clicks on “Create a new invoice button” or link on the home or landing page/view
2. “Create a new invoice” page/view is displayed to the user
3. View will be colour coded based on data from last invoice data of selected country and language combination.
4. If there is no existing data for the selected language and country combination then all sections will appear in RED color.
5. Sections where data will be available shall appear in GREEN boxes
6. The page shall have the following clickable sections:

6.1. CREATE INVOICE or CREATE PROFORMA: Depending on whether wants to create an Invoice or Pro forma invoice, system will generate invoice accordingly. Pro forma invoice will not be used for any calculations in Accounts Overview module

6.3. Invoice number: It will be an auto-generated value in the following format: INVYYYYXXXX. Where YYYY denotes the current financial year and XXXX denotes a running number. The first invoice of any new financial year will reset the running number XXXX to 0001. In case of Pro Forma Invoice, invoice number will follow the following format: PINVYYYYXXXX and it will be editable.

6.3.1. First Invoice for any account will allow user to modify the default running number. Subsequent invoice numbers will be in continuation of the last invoice number. See UseCase 2.8.15.

6.4. Company logo: Using this feature will enable the user to add or edit photo on the invoice template

6.5. Date: Using this feature will enable the user to edit invoice date on the invoice template

6.6. Your/Company Details: Using this feature will enable the user to add/edit user details on the invoice template

6.7. Delivery Note: This section will capture user’s delivery note for the invoice

6.8. Client/ Customer Details: Using this feature will enable the user to add/edit Customer/Client Details on the invoice template

6.9. Add Bill Items: Using this feature will enable user to add line by line description, price & quantity for the goods or services sold to the customer. Added bill items will show on the Create New Invoices page/view and bill items area will be scrollable. If user clicks or taps on any bill item then it will open the Add Bill Items page/view in edit mode

6.10. Bank Details: Using this feature will enable the user to add bank details to the invoice template for receiving payment against the invoice.

6.11. Declaration: Using this feature will enable the user to add/edit any comments or declaration to be used on the invoice templat

6.12. Signature: Using this feature will enable to add his/her signature to the invoice template

6.13. Preview: Will show how the invoice will appear when generated. It will have a watermark to indicate its a preview.

6.14. Save Draft: This will save the user entered data to the invoice template and save as draft. At most, a user cannot have more than 10 draft invoices. This button will not be available in Create Pro Forma Invoice. Non-signed user can have only one Draft version.

6.15. Generate Invoice: This feature will complete the process of creating an invoice and change draft invoice to raised invoice.

6.15.1. System will check if Company Details, Client/Customer Details and at least One bill item is filled before invoice can be generated. If any of these three are missing then display a message to the user.

6.15.2. User clicks on Generate Invoice button to save data and mark the invoice as generated. Application displays a message to the user that invoice is generated and user can click on Take Action button to view, download or share the invoice. Generate Invoice button becomes Green and Label changes to Take Action. When the user clicks on this Take Action button, then the application will open View Past Invoices section with take action panel opened for the current invoice in the display list.

6.15.3. If a user is not signed in then he will be prompted to sign up or sign in.

6.15.3.1.1. If user choses to sign-up or login, user selected language and country be associated with user account.

6.15.3.1.2. The draft invoice created as non-logged in user, will be converted to Generated Invoice or Saved Pro Forma invoice, as per the draft invoice data and option selected by the user.

6.15.3.1.2.1. When the user creates the next invoice, then this data will be used for pre-populating the Create New Invoice template.

6.16. In case of Create Pro Forma Invoice, button will show as “Save Pro forma”. User can see Pro Forma Invoice from Pro Forma tab of View Past Invoices

6.17. In case of Create Pro Forma Invoice, user will see Export to Invoice, which will convert Pro Forma into an Invoice

**Extensions (or Alternative Flows)**

Phase 2: Monetization of invoice creation

1. Every user signing up will get upto X number of free invoice generation facility
2. Once they reach the limit of X number of invoices, they will be prompted to buy a paid package from a choice of packages available
3. For this purpose, we need to implement payment gateway and subscription module

**Special Requirements**

1. There will be a help section on each page/view/pop-up to provide on-screen help to the user
2. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice – Your Logo***

Site User: wants to add/edit a photo or logo to the invoice template

**Pre-conditions:** ​User is on the app/site. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to add/edit photo/logo to the invoice template

**Main Success Scenario (or Basic Flow):**

1. User clicks on Your Logo section on Create/Edit new Invoice
2. Pop-up for Add/Edit Photo/Logo is displayed.
3. Pop-up displays existing logo
4. User selects a picture from local storage
5. Uploaded photo is displayed on the pop-up
6. User saves the photo to the template by clicking on the save button.
7. User is taken back to the Create a new invoice view and the section appears in GREEN color to indicate logo is available.
8. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

Field labels may vary from country to country

Field labels will change depending on language selected

If the user clicks or taps on a GREEN colored Your Logo section, then add/edit Your Logo page/view will open in edit mode. User can see last uploaded logo file with the current user account invoice template, and if needed then change it.

**Special Requirements**

1. There will be a help section on each page/view/pop-up to provide on-screen help to the user
2. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice – Add/Edit Your Details***

Site User: wants to add/edit own detail on the invoice template

**Pre-conditions:** ​User is on the site/app. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to add/edit own details to the invoice template

**Main Success Scenario (or Basic Flow):**

1. User clicks on Add/Edit Your Details button/link on Create/Edit new Invoice
2. Pop-up for Add/Edit Your Details is displayed. Fields on the pop will be prepopulated with existing data, if any.
3. The pop-up shall have the following fields:

3.1. Your (or Company name): If data exists, then it will be prefilled. Cannot be left blank.

3.2. Your (or Company address): If data exists, then it will be prefilled. Cannot be left blank.

3.3. Your Phone Number: If data exists, then it will be prefilled. Cannot be left blank.

3.4. Your Email ID: If data exists, then it will be prefilled. Cannot be left blank.

3.5. Your Kalakar Link or Website Link: If data exists, then it will be prefilled. Optional.

3.6. Your GST Number: If data exists, then it will be prefilled. Can be left. Label can change from country to country.

3.7. Your PAN Number: If data exists, then it will be prefilled. Cannot be left blank for Indian companies or Individuals. May or may not be display for countries other than India.

3.8. Your Aadhar Number: Optional, Numeric.

1. While creating a new invoice, if the user has multiple address, then the last used address will be prepopulated.

4.1. User will have option to add multiple addresses for the user.

4.2. A button will be provided to add a new address using which user can add address, email id, phone no, website link, PAN No, GST No and Aadhar No. PAN No, GST No and Aadhar No will be prepopulated from existing data. User can edit it, if needed.

4.3. User enters data for new address and presses save button. New address is stored in the db. New address data prefills customer details on the Add/Edit Client/Customer details.

1. Pressing the save button will save the data
2. User is taken back to the create a new invoice view and Your details section appears in GREEN if it was earlier in RED color.
3. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. User will be able to enter multilingual data
4. PAN, GST and Aadhar number fields will appear only wherever applicable in other countries.
5. There will be a help section on each page/view/pop-up to provide on-screen help to the user
6. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice – Date***

Site User: wants to Edit invoice date on the invoice template

**Pre-conditions:** ​User is on the site/app. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to edit invoice date

**Main Success Scenario (or Basic Flow):**

1. User is on Create a new Invoice page and sees current date
2. User clicks on edit date on Create/Edit new Invoice
3. Pop-up for Add/Edit Date is displayed.
4. User selects a date from the date calendar
5. User saves the new date by clicking on the save button.
6. User is taken back to the Create a new invoice view.
7. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. User cannot select a date earlier than the last invoice date.
2. There will be a help section on each page/view/pop-up to provide on-screen help to the user
3. User will get a visual notification for every failed and successful actions

**Technology and Data Variation lists**

***Invoices – Create a New Invoice – Delivery Note***

Site User: wants to Add/Edit Delivery Note on the invoice template

**Pre-conditions:** ​User is on the site/app. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to able to Add/Edit Delivery Note

**Main Success Scenario (or Basic Flow):**

1. User is on Create a new Invoice page and sees Delivery Note section
2. User clicks on Delivery Note on Create/Edit new Invoice
3. Pop-up for Delivery Note is displayed. It will have the following fields:

3.1. Delivery Note: Textbox, optional, alphanumeric

3.2. Mode/Terms of Payment: Textbox, optional, alphanumeric

3.3. Supplier’s Reference: Textbox, optional, alphanumeric

3.4. Other Reference(s): Textbox, optional, alphanumeric

3.5. Buyer’s Order Number: Textbox, optional, alphanumeric

3.6. Dated: Textbox, optional, alphanumeric

3.7. Dispatch Document No: Textbox, optional, alphanumeric

3.8. Delivery Note Date: Textbox, optional, alphanumeric

3.9. Dispatched Through: Textbox, optional, alphanumeric

3.10. Destination: Textbox, optional, alphanumeric

3.11. Terms of Delivery: Textbox, optional, alphanumeric

1. User saves the Delivery note by clicking on the save button.
2. User is taken back to the Create a new invoice view and Delivery Note section appears in GREEN if it was earlier in RED color.
3. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. There will be a help section on each page/view/pop-up to provide on-screen help to the user
2. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice – Add/Edit Client/Customer Details***

Site User: Wants to add/edit client/customer details on the new invoice

**Pre-conditions:** ​User is on the site. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to Add/Edit Your Client/Customer Details to theinvoice template

**Main Success Scenario (or Basic Flow):**

1. User clicks on Add/Edit Your Client/Customer Details button/link on Create/Edit new Invoice
2. Pop-up for Add/Edit Your Client/Customer Details is displayed.
3. User sees the following fields on the pop-up:

3.1. Customer/Client Name: Alpha Numeric, cannot be left blank

3.2. Customer Address: Alpha Numeric, cannot be left blank

3.3. Customer Phone No: Valid phone format, cannot be left blank

3.4. Customer Email ID: Valid email format, cannot be left blank

3.5. Customer Kalakar Link or Website address: Optional

3.6. Customer PAN No: Valid PAN format, cannot be left blank

3.7. Customer GST No: Valid GST No, Optional

3.8. Customer Aadhar Number: Numeric, Optional

1. While creating a new invoice, if a customer has multiple address, then the last used address will be populated.

4.1. User will have option to add multiple addresses for a customer.

4.2. A button will be provided to add a new address using which user can add address, email id, phone no, website link, PAN No and GST No. PAN No and GST No will be pre-populated from existing data. User can edit it, if needed.

4.3. User enters data for new address and presses save button. New address is stored in the db. New address data prefills customer details on the Add/Edit Client/Customer details.

1. User saves the Customer/Client data by clicking on the save button.

7. User is taken back to Create a new Invoice page and Client/Customer details section appears in GREEN if it was earlier in RED color.

8. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. If the user has no existing customer then the fields will be empty.
2. If user has one existing customer then the data will be pre-filled.
3. If user has more than one existing customer then the fields will be empty. Auto-suggestion will appear as user starts typing in the Customer/Client field name. User can chose to select from the auto-suggestion or fill-up a new customer details.
4. If user selects from auto-suggestion then all fields will be pre-filled by existing data of the customer.
5. If user saves a new customer data then a new customer will be added in the database for the user.
6. If user modifies data of any existing customer then it will be updated in the DB for the user.
7. Field labels may vary from country to country
8. Field labels will change depending on language selected
9. User will be able to enter multilingual data
10. PAN, GST and Aadhar number fields will appear only wherever applicable in other countries.
11. There will be a help section on each page/view/pop-up to provide on-screen help to the user
12. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice – Add Item***

Site User: Wants to add/edit Bill Item on the new invoice

**Pre-conditions:** ​User is on the site. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to Add/Edit Bill Item to the invoice template

**Main Success Scenario (or Basic Flow):**

1. User clicks on Add Item button/link on Create/Edit new Invoice
2. Pop-up for Add/Edit Billing details is displayed.
3. If data is already available then it will be displayed on the pop-up
4. User sees the following fields on the pop-up:

4.1. Tax Applicable – NRI/NON REGISTERED, GST or IGST. It will be selected only once per invoice

4.3. Bill Item details section: It will be captured for each bill items and shall display the following fields:

4.3.1. HSN Code: Need to be required, displayed and captured only if GST or IGST is applicable tax

4.3.2. Description of Service/Goods: Required. Captures the description of service/goods being sold

4.3.3. Tax rate:

4.3.3.1. CGST – Required if selected applicable tax is GST. If not GST then not editable.

4.3.3.2. SGST – Required if selected applicable tax is GST. If not GST then not editable.

4.3.3.3. IGST – Required if selected applicable tax is IGST. If not IGST then not editable.

4.3.3.4. All three fields will remain non-editable of selected applicable tax is NRI/NON REGISTERED.

4.3.4. No of days/Units/Shifts – Required. Numeric.

4.3.5. Rate per Day/Unit/shift – Required. Numeric.

4.3.6. Total: User sees total amount of the entered bill detail

4.4. User clicks on the Save button to save data and go back to “Create a new invoice” page. Newly added Bill Item will show on Create a new invoice.

4.7. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

1. If user taps on any bill item on “Create a new invoice” page then it opens in the edit mode

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. User will be able to enter multilingual data
4. There will be a help section on each page/view/pop-up to provide on-screen help to the user
5. User will get a visual notification for every failed and successful actions
6. *Phase 2 - Provide autofill suggestions as user types in bill description field based on user’s past invoices*

***Invoices – Create a New Invoice – Bank Account Details***

Site User: wants to Add/Edit Bank Account Details on the invoice template

**Pre-conditions:** ​User is on the site. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to add/edit bank detail on the new invoice

**Main Success Scenario (or Basic Flow):**

1. User is on Create a new Invoice page
2. User clicks on Bank Account Details on Create/Edit new Invoice
3. Pop-up for Add/Edit Bank Details is displayed. If there is any exist data then the last used bank details will be prefilled.
4. Pop-Up has the following fields on the pop-up:

4.1. Beneficiary Name: Required. Alphanumeric field.

4.2. Bank Name: Required. Alphanumeric field.

4.3. Bank Account Number: Required. Alphanumeric

4.4. Bank IFSC Code: Required for India. Alphanumeric.

4.5. Bank Branch/Location: Alphanumeric

1. User add/edits data in these fields and clicks on the save button.
2. Bank details data is saved and user is taken back to the Create a new invoice view and Bank Account details section appears in GREEN if it was earlier in RED color.
3. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

1. User will be provided a link/button to add more bank accounts on the pop-up.

1.1. User clicks on the link. A pop-up opens. User sees a list of existing bank accounts. Below it user sees fields for adding new bank details.

1.2. User fills Beneficiary Name, Bank name, account number, IFSC code and Bank branch

1.3. User presses save button.

1.3.1. The newly added bank details is added to the list and marked as primary.

1.3.2. User can continue adding more account details.

1.4. User presses “save and use”

1.4.1. The newly added bank details is added as primary

1.4.2. Pop-up closes and new bank details prepopulate the bank details on Add/Edit Bank Details pop-up

1. User will have option to make any bank account as primary.

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. User will be able to enter multilingual data
4. There will be a help section on each page/view/pop-up to provide on-screen help to the user
5. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice –Declaration/Comments***

Site User: wants to Add/Edit Declaration/Comments on the invoice template

**Pre-conditions:** ​User is on the site. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to add/edit declaration/comments on the newinvoice

**Main Success Scenario (or Basic Flow):**

1. User is on Create a new Invoice page
2. User clicks on Declaration on Create/Edit new Invoice
3. Pop-up for Add/Edit Declaration/Comments is displayed. It will be prefilled if any data exists.
4. Pop-Up has the field “Declaration” for capturing user entered declaration/comments.
5. User enters data in the field and clicks on the save button.
6. Declaration/comments is saved and user is taken back to the Create a new invoice view.
7. Declaration section appears in GREEN if it was earlier in RED color
8. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. User will be able to enter multilingual data
4. There will be a help section on each page/view/pop-up to provide on-screen help to the user
5. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice – Signature***

Site User: wants to add/edit Signature to the invoice template

**Pre-conditions:** ​User is on the site. User is on Create a new invoice.

**Success Guarantee (Post-conditions):** ​User is able to add/edit signature to the invoice template

**Main Success Scenario (or Basic Flow):**

1. User clicks on Signature section on Create/Edit new Invoice
2. Pop-up for Add/Edit Signature is displayed.
3. User is provided with two options to add/edit Your Signature:

3.1. Use finger or Stylus to sign. This option will be available only on mobile devices. User can click on “Redo Sign” button/link to sign until satisfied. Upon clicking of save button System will create a PNG file of the signature, reduce the image dimension and upload the signature file to the server.

3.2. Upload image from disk/local storage to the server

1. User is taken back to the Create a new invoice view and Signature section appears in GREEN if it was earlier in RED color
2. There will a close(X) button to close the popup. If user has any unsaved data, then warn user to save data befor closing the popup.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – View Past Invoices***

Site User: wants to view past invoices

**Pre-conditions:** ​User is signed up and logged on the site. User is on Invoices landing page.

**Success Guarantee (Post-conditions):** ​User is able to see a list of past invoices

**Main Success Scenario (or Basic Flow):**

1. User clicks on View Past Invoices link on Invoices landing page
2. If no past invoice exists then user will see a message about it. Otherwise the user will see a View displaying a list of past invoices.
3. User can also opt to see Draft Invoices by clicking on “Draft” button on this view
4. User will be provided an option to View Pro Forma Invoices as well.
5. User is sees the following actionable links on the view:

5.1. Sort – User can sort the display of provided options – By Invoice date. The default sort order will be by descending order of invoice date.

5.2. Search – User can search an invoice based on keywords

5.3. List of invoices – It will be a default list of all past invoices in descending order of Invoice date. User will see the following data information related to each invoice – Invoice number, Invoice date, Customer name, Amount Paid or Due and Payment status. Clicking on each record will provide options for further user actions. It is covered in UC2.8.8.

5.3.1. If the invoice is partially paid then it will display Amount paid and Amount due details.

5.4. Cancelled Invoices will have a dark overlay with CANCELLED appearing prominently on it.

5.5. In case of Draft or Pro Forma invoices, payment will not show.

**Extensions (or Alternative Flows)**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – Track Payment Dues***

Site User: wants to track invoices where payment is due

**Pre-conditions:** ​User is signed up and logged on the site. User is on Invoices landing page.

**Success Guarantee (Post-conditions):** ​User is able to see a list of past invoices where payment is stilldue

**Main Success Scenario (or Basic Flow):**

1. User clicks on Track Payment Dues link on Invoices landing page
2. If no past invoice having dues exist then user will see a message about it. Otherwise the user will see a View displaying past invoices where payment is still fully/partly due.
3. User sees the following actionable links on the view:

3.1. Sort – User can sort the display of provided options – By Invoice date. The default sort order will be by descending order of invoice date.

3.2. Search – User can search an invoice based on keywords where payment is due or partially paid

3.3. List of invoices – It will be a default list of all past invoices in descending order of Invoice date. User will see the following data information related to each invoice where payment is fully/partly due – Invoice number, Invoice date, Customer name, Amount due and Payment status Clicking on each record will provide options for further user actions. It is covered in UC2.8.8.

**Extensions (or Alternative Flows)**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

**Special Requirements**

Phase 2: Monetization possibilities around GST

1. Export data in excel or PDF for easier GST filing
2. Integrate with GST system for GST return filing

***Invoices – Total Account Overview***

Site User: wants to see an overview of invoices raised, payment received and amount due with customer

**Pre-conditions:** ​User is on the site. User is on Invoices landing page.

**Success Guarantee (Post-conditions):** ​User is able to see an overview of his accounts

**Main Success Scenario (or Basic Flow):**

1. User clicks on Total Account Overview link on Invoices landing page
2. If user is non-logged in or there is no data, all values will show as ZERO and all actionable buttons will be disabled.
3. Total Account Overview page will display the following information or actionable objects:;

3.1. Period: User can select a date range will which user wants to generate the account overview. It will be default option for the Account Overview

3.2. Period Preset – If user doesn’t wants to select the date period then the user can select Period Preset and opt for one the following preset date ranges: 1 Month, 3 Months, 6 Months and 1 Year

3.3. Total Invoices Raised: It will display cumulative sum of all invoices raised during the selected time period. Cancelled invoices will be excluded.

3.4. Total Payment received: It will display cumulative sum of fully/partly received payments during the selected time period. Cancelled invoices will be excluded.

3.5. Outstanding amount: It will display cumulative sum of invoices where the payment is partly/fully due during the selected time period. Cancelled invoices will be excluded.

3.6. Total Tax Amount: It will display cumulative sum of tax amount of all invoices raised during the selected time period. Cancelled invoices will be excluded.

3.7. Net Earning for Period: Will display net of total bills raised after deducting tax amount

3.8. Total Expenses for Period: Will display a sum of all expenses incurred during the selected period.

3.9. Print All Invoices for period: User should be able to get all invoices for the period in a single PDF file

3.10. Print All Expenses for Period: User should be able to get all Bills for period in a single PDF file:

1. User will have an option “Manage Accounts” on this page. This page will have the following options: 4.1. Manage Invoice Customer Details: Using this feature, user should be able to manage

client/customer details.

4.1.1. List all customers associated with the account

4.1.2. User can search or Sort account alphabetically in ascending or descending order. Default list of existing accounts will be in ascending order

4.1.3. Allow user to add/edit client/customer details.

4.1.3.1. Add/Edit Customer/client

4.1.3.1.1. Add new Customer Client

4.1.3.1.1.1. User enters new customer/client name and presses Add button

4.1.3.1.1.2. New Customer name is added to the list of existing customers

4.1.3.1.1.3. User presses on Edit button against the new customer name

4.1.3.1.1.4. User sees Customer details page. Since it’s a new customer, so all other

details will be missing

4.1.3.1.1.5. User presses on EDIT button

4.1.3.1.1.6. User sees all fields related to customer details

4.1.3.1.1.7. User enters data and presses save to make Customer details active

4.1.3.1.2. Edit customer details

4.1.3.1.2.1. User presses EDIT button for an existing customer

4.1.3.1.2.2. User sees customer details page.

4.1.3.1.2.3. User presses edit on this page, all fields are prepopulated with existing data

4.1.3.1.2.4. User saves data

4.1.3.1.3. Add/edit/delete/make primary addresses for a client/customer.

4.1.3.1.3.1. Add a new address

4.1.3.1.3.1.1.On Customer details page, user sees “Add another address” button and presses it

4.1.3.1.3.1.2.User sees a box to enter address

4.1.3.1.3.1.3.user enters the address and presses save button

4.1.3.1.3.1.4.new address is saved

4.1.3.1.3.2. Make Primary address

4.1.3.1.3.2.1.User clicks on Make Primary Address button against an address, on Customer Details Page.

4.1.3.1.3.2.2.Existing address is replaced by the new primary address and existing address moves to list of other addresses

4.1.3.1.3.3. Delete an address

4.1.3.1.3.3.1.User clicks on Delete button against an address, address is removed and marked deleted

4.1.3.1.3.3.2.User cannot delete a primary address

4.2. Manage Expense Accounts: Using this feature, user should be able to do the following:

4.2.1. User can search or Sort account alphabetically in ascending or descending order. Default list of existing accounts will be in ascending order

4.2.2. It will have a text box for adding new account.

4.2.2.1. User enters a new Account and presses Add button. New Account will be added and it will pre-populate “Account” field

4.2.3. Below Create New Account, user will see a list of existing accounts.

4.2.3.1. User can edit or delete existing accounts

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – Record Expenses and Bills***

Site User: wants to records all expenses and bills and keep a track of them

**Pre-conditions:** ​User is logged on the site. User is on Invoices landing page.

**Success Guarantee (Post-conditions):** ​User is able to record an expense the provided feature

**Main Success Scenario (or Basic Flow):**

1. User clicks Record expenses and Bills on Invoices landing page
2. A pop-up/view/page opens for recording user expense
3. Record Expenses and Bills pop-up/page/view will display the following information or actionable objects:

3.1. Upload Bill Picture: Optional. User can take a picture of the bill and upload the picture to the server. Prepopulate if in edit mode.

3.2. Amount: User will enter bill amount in this field. Numeric. Required. Prepopulate if in edit mode.

3.3. Date: By default, user will see current date. User can edit it to any past date. Prepopulate if in edit mode.

3.4. Tag: Required. Alphanumeric. User can this tag this expense which an activity. For example, lunch or commuting or laundry etc. Prepopulate if in edit mode.

3.5. Account: Required. As user starts typing, user can select from available Accounts in the dropdown to mark Account for the expense incurred. Or, the user can type a new Account. When user saves data, new Account will be added and user will be displayed a message informing that user can edit or delete Accounts from Manage Accounts functionality on Total Accounts Overview section.

3.6. GST No: Optional text field for capturing GST No on the bill

3.7. Tax Amount: Optional text field for capturing Tax amount on the bill

3.8. Payment Mode: Available button options will be - Cash, Credit Card, Bank and Other 3.8.1. User can click on any to select it

3.8.2. If user selects Other then open a text box to capture the detail 3.9. Save: User can save this expense by pressing the save button.

3.9.1. After saving, user is taken back to the Invoicing landing page.

3.9.2. If in edit mode, user is taken back to View Expenses and Bills page/view/pop-up. User will see expenses record updated with latest data.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – View Expenses and Bills***

Site User: wants to view expenses and bills user stored

**Pre-conditions:** ​User is on the site. User is on Invoices landing page.

**Success Guarantee (Post-conditions):** ​User is able to view a past expense detail

**Main Success Scenario (or Basic Flow):**

1. User clicks View Expenses and Bills on Invoices landing page
2. A pop-up/view/page opens for Viewing expenses and bills. By default it displays list of all expenses in descending order of expense date
3. If user is non-logged in or there is no data, show a message that there is no data available
4. Pop-up has the following info and actionable objects:

4.1. Sort: User can sort the displayed by Date (asc/desc), Account or Amount (large/small)

4.2. Search: User can search the expenses by keyword

4.3. User sees a list of expenses stored in the system. Each record shall display the following information:

4.3.1. Account name

4.3.2. Tag for this entry

4.3.3. Date

4.3.4. Amount

4.3.5. Bill image, is available. User can click on the bill to view its enlarged size.

4.4. Area displaying Account name, Date, Amount & Tag will be clickable. Clicking on the area will open Record Expenses and Bills view in edit mode.

4.5. Swiping the item left or right should allow user to view button for deleting an expense item

4.6. Hard press should enable a user to multi-select expense items and delete

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – Take Action***

Site User: wants to take permitted actions on a new or past invoice or due invoices

**Pre-conditions:** ​User is signed up and logged on the site. User is on Create a New Invoice or View PastInvoices or View Due Invoices page/view/pop-up.

**Success Guarantee (Post-conditions):** ​User is able take chosen action on the invoice

**Main Success Scenario (or Basic Flow):**

1. User clicks on any item on View Past Invoices or View Due Invoices page/view
2. It opens Take Action appears below the item.

2.1. If user clicks on the same invoice item again then the Take Action section collapses

2.2. If the take action section is open for any item and user clicks on another item, then the open Take Action section closes and Take Action section opens for the newly clicked invoice item.

1. Take Action page/view/popup shall have the following functionality

3.1. EDIT/CANCEL: Clicking on the button will show user the following two options – EDIT INVOICE and CANCEL/DELETE.

3.1.1. If user chooses to edit the invoice then the Create a new invoice page will open in Edit Mode. No versioning will be maintained.

3.1.2. If the user chooses to cancel/Delete then the invoice will be marked cancelled 3.1.2.1. Cancel option will not be available for Pro Forma or Drafts. Instead, they will have

DELETE option

3.2. Share: Clicking on this button will show user options to Share – EMAIL, WHATSAPP, FB, etc. Before user can share, invoice will be downloaded as PDF

3.2.1. Sharing will not be available for DRAFTS

3.3. Mark as Paid: This option will not be available for DRAFTS and PRO FORMA. It Will prompt the user to select from the following options:

3.3.1. Paid: User can mark this invoice to indicate that the user has received the full invoice amount.

3.3.2. Partially Paid: Selecting this option will prompt user to enter the paid amount and store in the system

3.3.3. Unpaid: Will mark the invoice as unpaid

3.4. View/Print/Generate: This option will not be available for DRAFTS and PRO FORMA. Clicking on it will prompt user to select whether user wants to show invoice as jpeg image or PDF.

3.4.1. Viewing: User will view the invoice on a new View. It will have a watermark to indicate its a View.

3.4.2. Depending on the action performed a jpeg or PDF file will be generated and downloaded to user devices for viewing.

3.4.3. Generate JPEG: It will download the invoice as JPEG. File naming convention will follow the following format: YOURNAME\_INVXXXX.JPEG

3.4.3.1. There will be three sets of jpegs: One jpegs each for Original, Customer and Courier. These labels will be printed on each jpeg

3.4.3.2. After the file is generated and saved, it will inform the user location in which the file is saved.

3.4.4. Generate PDF: It will download the invoice as PDF. File naming convention will follow the following format: YOURNAME\_INVXXXX.PDF

3.4.4.1.1. Bills will be generated in triplicate. Each bill have a copy for Original, Customer and Courier. All will be one PDF.

3.4.4.1.2. After the file is generated and saved, it will inform the user location in which the file is saved.

3.5. Send Legal Notices: This option will not be available for DRAFTS and PRO FORMA. Clicking on this action will prompt the user to select a template for preparing a legal notice that the user can print and send to the customer for not paying the invoice amount on time. System will store the date when a template was downloaded and show to the user so that user knows which one are already downloaded and sent.

3.5.1. These legal notice templates will be provided by Kalakar after consulting a legal expert.

3.5.2. User can view these templates before using them.

3.5.3. If the user selects a legal notice template to be used then place holder data like user details, customer details, invoice number, invoice amount, invoice date, signature etc. will be pulled from the current invoice and populated in the template.

3.5.4. Template will then be saved as PDF on user computer or mobile.

3.5.5. User can then print this PDF and send to customer for non-payment of invoice

3.6. Preview: This option will be available for DRAFTS and PROI FORMA and will display a preview of the invoice based on data entered by user

3.7. Export to Invoice: This option will be available for PRO FORMA and will enable a user to convert Pro Forma invoice to a proper invoice.

1. User can delete an invoice/draft/pro forma by swiping left or right. On a swipe, button for delete action will show. User can click on the button to delete item.
2. User can hard-press to select multiple invoices/draft to delete multiple items in one action.

5.1. On hard pressing, user will see the current item selected.

5.2. Count of number of items select will display on top, along with a delete button

5.3. User can multi-select items by tapping on more invoices

5.4. User can click on the delete button to delete selected invoices/drafts

5.5. Before deleting, application will confirm with the user wants to delete x number of selected invoices.

5.6. On user confirm, selected items will be deleted and removed from list of past invoices/drafts/pro forma

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels may vary from country to country
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/popup to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – Send Suggestions to App Builder***

Site User: Mobile device user wants to send suggestions to App Building for making it effective

Kalakar: Wants to provide a feature to app users so that they can share their views on improving the app to make it into an effective invoicing and expense tracker tool

**Pre-conditions:** ​User is signed up and logged on the site.

**Success Guarantee (Post-conditions):** ​User is able send a suggestion to the app builder

**Main Success Scenario (or Basic Flow):**

1. User is on invoicing landing page
2. User clicks on Send Suggestions to App Builder link/button
3. A pop-up opens which prompts user to share their feedback in a text field.
4. User enters the feedback and submits the data.
5. Data is received by Kalakar by email

**Extensions (or Alternative Flows)**

**Special Requirements**

1. Field labels will change depending on language selected
2. There will be a help section on each page/view/pop-up to provide on-screen help to the user
3. User will get a visual notification for every failed and successful actions

***Invoices – Sign In***

Site User: User would need to Sign In to be able to use Invoicing functionality

**Pre-conditions:** ​User is on the site.

**Success Guarantee (Post-conditions):** ​User is able to Sign In and all features and functionalityavailable to a signed up user

**Main Success Scenario (or Basic Flow):**

1. User clicks on the Sign In button on the Account Settings section or non-logged user is forced to sign in on clicking Generate Invoice button on Create a new Invoice or Save button on Record expense bills
2. A Sign In page/view is displayed to the user
3. Pop-up has link to access “Sign Up” pop-up for users who are registered.
4. Pop-up has Email/phone and password fields
5. User needs to enter text in both the fields
6. User needs to enter a valid email id or phone
7. User needs to enter a valid password
8. User submits the login form
9. If user accessed Sign In from Account Settings page then user will see updated Account Setting page. Register (Sign Up) button will disappear and Sign In button changes to Logout.
10. If user came from Create a new Invoice then user will be signed in and displayed a message that his invoice has been generated and, s/he stays on the Create a new Invoice page. Generate invoice button would turn Green and label changes to Take Action.
11. If user came from Record expenses/bills then user will see list of View Expenses/Bills

**Extensions (or Alternative Flows)**

1. If user doesn’t remember the password then user can use the Forgot Password functionality available on login pop-up to reset the password and login
2. User can access Sign In pop-up by clicking any button/link on the invoicing module landing page.
3. Field labels will change
4. depending on language selected
5. There will be a help section on each page/view/pop-up to provide on-screen help to the user

**Special Requirements**

1. Only those users will be able to login who are already registered on the platform. For those users who are not registered, Sign In pop-up will display button for creating an account.
2. Field labels will change depending on language selected
3. There will be a help section on each page/view/pop-up to provide on-screen help to the user
4. User will get a visual notification for every failed and successful actions

***Invoices – Register***

Site User: Wants to sign up on the website to access full functionality of invoicing module

**Pre-conditions:** ​Landing page is fully loaded and user is not signed up

**Success Guarantee (Post-conditions):** ​User is able to login using newly created user account

**Main Success Scenario (or Basic Flow):**

1. User clicks on the Register button on the Account Settings section or non-logged user is forced to Register on clicking Generate Invoice button on Create a new Invoice or Save button on Record expense bills
2. A registration page/view is displayed
3. Pop-up has link to access “Sign In” popup if user is already registered.
4. User is prompted to enter data for the following fields:
   1. First Name: Required. Alphanumeric
   2. Last Name: Optional. Alphanumeric
   3. Email-id: Required. Valid Email
   4. Phone Number: Required. Numeric.
   5. Country: Drop down

i. Country will be used for capturing country and currency of the 1st account

* 1. Password: Required. Alphanumeric.
  2. Verify Password: Required. Alphanumeric.

1. User needs to agree to T&C and Privacy Policy before it can sign up
2. User has access to T&C and Privacy Policy through a link on the sign up pop-up
3. User submits the form after entering the required fields and agreeing to T&C and Privacy Policy
4. System checks if user phone or email is already registered, if yes then it displays a message that entered phone or email is already exists.
5. If both are not existing then system creates a new user account and triggers a separate process for phone verification
6. User is displayed a page for mobile phone verification process
7. User is sent an email for email id verification
8. User needs to complete mobile phone verification to be able to continue on the app
9. If user accessed Sign In from Account Settings page then user will see updated Account Setting page. Register (Sign Up) button will disappear and Sign In button changes to Logout.
10. If user came from Create a new Invoice then user will be signed in and displayed a message that his invoice has been generated and, s/he stays on the Create a new Invoice page. Generate invoice button would turn Green and label changes to Take Action.
11. If user came from Record expenses/bills then user will see list of View Expenses/Bills

**Extensions (or Alternative Flows)**

**Mobile phone verification:**

1. User receives an OTP on the registered mobile number.
2. User clicks on the Mobile phone verification view to enter the OTP received.
3. System checks for authenticity of the OTP.
4. If the OTP is valid then user mobile is verified.
5. If the entered OTP is not valid, then user is prompted to enter OTP again

6. If user doesn’t get the OTP, then user is provided with a link to resend the OTP. This link will become active one minute after user requesting the OTP first time.

**Email verification:**

1. User is sent an containing a link to be clicked on by user to complete the verification process
2. Until the user clicks on this link, email id will remain unverified
3. User can request to resend verification email from Basic details section

“Sign Up” pop-up is also accessible from “Sigh In” and “Forgot Password” pop-up.

**Special Requirement**​:

1. As soon as a new user signs up, he will be assigned a user account by default. His account name will be a combination of his first and last name. His default country will be set as India and default invoice template will be set as English.
2. There will be a help section on each page/view/pop-up to provide on-screen help to the user
3. User will get a visual notification for every failed and successful actions

**Technology and Data Variation lists**

Need third party messaging service for timely delivery of OTP to mobile phones.

***Invoices – Forgot Password***

Site User: Has forgotten password to his/her account and wants to log on

**Pre-conditions:** ​Invoicing landing page is fully loaded and user is not logged in

**Success Guarantee (Post-conditions):** ​User is able to reset the password and login successfully

**Main Success Scenario (or Basic Flow):**

1. User clicks on the Sign In link in the header section
2. Sign In pop-up is displayed to the user
3. Pop-up has a link “Lost your password?”
4. The forgot password opens which has a field for entering registered user’s phone number and reset password button
5. User needs to enter a valid phone number
6. User clicks on the reset password button or presses enter button when the focus is in the phone number field
7. This submits the reset password details to the server
8. Server checks if the phone number is associated with any user
9. If it is associated with any user then it triggers the reset password OTP
10. User gets the reset password OTP on his phone
11. User enters the OTP in the OTP verification view and submits
12. System verifies the entered OTP and if it is found to be valid, new password screen is displayed to the user
13. If user doesn’t get the OTP, then user is provided with a link to resend the OTP. This link will become active one minute after user requesting the OTP first time.
14. User is prompted to enter new password and re-enter new password
15. User submits the form
16. User’s password is updated and user is logged in.

**Extensions (or Alternative Flows)**

For Website: User can also use email id to initiate lost password functionality

**Special Requirements**

1. Only those users will be able to reset their password who are already registered with the website
2. User can go back to the “Sign In” box if user clicks on “Sign In” link in the “Forgot Password” box.
3. “Forgot password” box will also have a link to access “Sign Up” box
4. There will be a help section on each page/view/pop-up to provide on-screen help to the user
5. User will get a visual notification for every failed and successful actions

**Technology and Data Variation lists**

Need third party messaging service for timely delivery of OTP to mobile phones.

***Invoices – Account Settings – Logged In User***

Site User: User wants to view or edit Account Settings data or add another account

**Pre-conditions:** ​User is on Invoicing landing page and user is logged in

**Success Guarantee (Post-conditions):** ​User is able to view/edit Account Settings data

**Main Success Scenario (or Basic Flow):**

1. User is on invoicing landing page
2. User sees User Account Settings section at the bottom left
3. User clicks on it
4. User Account Settings page/view opens.
5. It displays Select Account drop down and current Account is selected by default.
6. User click on it to view all existing Accounts and can select any of them to change his/her Account.
7. Selecting on any other Account will have the following impact:

7.1.1. It will change user country based on selected Account

7.1.2. It will change currency for the billing, based on selected Account

7.1.3. It will change Invoice language and invoice template based on the language of the last invoice of the selected Account. If it’s a new Account then the default invoice template language will be the language set in the App Settings.

1. Add Account: Using this functionality, user can add a new Account.

8.1. User sees a text box to enter a new Account name and add button.

8.1.1. User will have to select a country from the drop-down before user can add a new Account

8.1.2. User will have to select currency from the drop-down. Default currency will be related to the country selected but user can change it before creating the account

8.2. Newly added Account appears in the drop-down and but will not be selected as the default Account. User will have to select it to be able to make it the current Account. Changing the current Account will have the following impact

8.2.1. Country for the new account change to the country user selected while creating the account

8.2.2. Billing currency will change to choice user selected while creating the account

8.3. In Phase 2, add account section will be behind a button and will display fields only after it is clicked on

1. App settings

9.1. Select language: default will be English for the non-logged in or first time user. User can select any option from the list of provided options.

9.2. Your Payments: Phase 2 feature. For managing subscriptions.

9.3. Edit Your Basic Details: Using this feature, user can update sign up details user provided during signup.

9.3.1. User can see the status of email verification

9.3.2. User can request for resending email id verification email

9.3.3. User can update first name, last name, email, phone and password

**Extensions (or Alternative Flows)**

**Special Requirements**

1. There will be a help section on each page/view/pop-up to provide on-screen help to the user
2. User will get a visual notification for every failed and successful actions

***Invoices – Account Settings – Non-logged or First time user***

Site User: User wants to view or create a new account

**Pre-conditions:** ​User is on Invoicing landing page and user is not logged in

**Success Guarantee (Post-conditions):** ​User is able to view or create new Account

**Main Success Scenario (or Basic Flow):**

1. User is on invoicing landing page
2. User sees User Account Settings section at the bottom left
3. User clicks on it
4. User Account Settings page/view opens.
5. User see “Register” and “Sign Up” buttons
6. It displays “Guest Account” in the Select Profile drop-down and India is the default country for the Guest Account.
7. Add Account: User sees Add Account section but it will be disabled. User will be prompted to Register or Sign In to be able to create a new Account when clicked

7.1. User sees a text box to enter a new Account name and add button.

7.2. User sees a dropdown for Country selection.

7.3. User sees a drop-down for currency selection

1. App settings

8.1. Select language: default will be English for the non-logged in or first time user. User can select any option from the list of provided options to change the language of the application

8.2. Your Payments: Phase 2 feature. For managing subscriptions. This feature will able disabled

8.3. Edit Your Basic Details: This feature will appear disabled

**Extensions (or Alternative Flows)**

**Special Requirements**

1. There will be a help section on each page/view/pop-up to provide on-screen help to the user
2. User will get a visual notification for every failed and successful actions

***Invoices – Create a New Invoice – Edit Invoice Number***

Site User: User wants to create his/her first invoice

**Pre-conditions:** ​User is on Invoicing landing page and user may be logged in or may not be logged in

**Success Guarantee (Post-conditions):** ​User is able to edit invoice number of his first invoice ofselected account

**Main Success Scenario (or Basic Flow):**

1. User is on Create a New Invoice page
2. User clicks on Invoice Number on Create/Edit new Invoice
3. User sees system generated invoice number in the pop-up. It will be an auto-generated value in the following format: INVYYYYXXXX. Where YYYY denotes the current financial year and XXXX denotes a running number. The first invoice of any new financial year will reset the running number XXXX to 0001. In case of Pro Forma Invoice, invoice number will follow the following format: PINVYYYYXXXX and it will be editable.
4. If the current invoice is the first invoice of the selected account

12.1. User will be allowed to edit the running number

12.2. User wont be allowed to edit subsequent invoice numbers

1. If the user is creating a Pro Forma invoice

13.1. User can edit Invoice number. There is no limitation on modification of Pro Forma Invoice

1. There will be a close button to close the pop-up
2. User can click on Save button to save and close the pop up.

**Extensions (or Alternative Flows)**

**Special Requirements**

1. There will be a help section on each page/view/pop-up to provide on-screen help to the user
2. User will get a visual notification for every failed and successful actions

