**HD – V2**

**Basic Requirements.**

1. Two types of users
   1. Business
   2. Individuals
2. Two types of roles for each of users
   1. Retailer
   2. Wholesale

Business and individuals are only used for notifying target shipping service (BPS, Leve, Curios’) and using tax Id (CPF, CNPJ). No further use.

**Retailer Account:**

1. Can register account. (default role is retailer for every account)
2. Will be assigned a unique POBOX Number in format **(HERCO XXXX)**  and USA warehouse address added by admin.
3. Can create pre alerts of Orders. Data => (merchant, carrier, tracking id, invoice, order date)
4. Cannot add (warehouse number. Weight, dimensions, and picture). These will be added by admin.
5. Can request for consolidation of two or more orders. (admin will open each package and put into a single bag/box to make one order.) admin will charge extra money.
6. Can create multiple Destination addresses in the system for future use.
7. Can select extra services offered by system and Can Select from list of shipping services provided by system for transportation of Packages.
8. Will create an invoice of items included in the order for customs declaration before payment and confirm invoice before payment. Cannot edit invoice after payment.
9. pay order and can save billing information for further use.
10. Can see and calculate rate with or without authentication.
11. Can print Receipt of items.
12. Can print receipt of order.

**Whole Sale Account:**

1. Can register account. (admin will assign wholesale role)
2. Step 2 is same as Retailer.
3. Step 3 is same as Retailer.
4. Can add weight, dimensions and pictures. ( cannot add warehouse number it will be added by admin only).
5. Step 5,6,7,8,9,10,11 and 12 same as retailer.
6. Can print CN23 Label for packages.

**Admin:**

1. Can create pre alerts with all data (warehouse number, dimensions, weight and pictures.)
2. Can edit, consolidate and create orders for customers.
3. Can change status of orders.
4. Can view invoice of items and edit for customer.
5. Can view and print invoice of items.
6. Can view detail of order. (every user can see details).

**Core Admin features:**

1. Can add Shipping services (BPS, LEVE, corios etc.) and will upload rates of each service.
2. Can create profit packages for different type of customers to give them discount. And will assign package to customer.
3. Can add extra services Like (bubble wrap, plastic tape, airport transfer etc.)
4. Can view Profit per order. System should maintain a record of each transaction and should be able to calculate profit for each order.
   1. Profit calculation will be as follows.
   2. HD purchase shipping service from other service providers Like BPS, Leve and corios. So, HD have to pay other services for shipping according to there rates. Those rates will be uploaded to system and HD will add profit on those rates. Customer will pay (Shipping Prices offered by Shipping services + HD profit). If customer select extra services those prices will also be added to the total of order. So, admin will take profit on those extra services also. How much profit admin will charge for extra service will be defined when customer will create extra service. system will calculate total cost of an order admin is bearing minus total revenue per order collected from customer. The margin will be profit per order for admin.
5. General Profit Settings.
   1. If a user dose not have any profit package then the default profit settings will be used.

**Reports:**

1. Can generate reports for all users to count their shipments in a range of dates. Total weight they have shipped using HD.
2. Can generate Profit Report in a range of dates.

**General Features:**

1. Api for **Interport** to update warehouse number, dimensions and pictures. If no related data found it will create a new order as pre alert and will update above mentioned information.
2. General API for customers Like BPS Is providing. (Admin will turn on of to allow a user to use API)
   1. Api will have option to create, (Edit and delete for unpaid packages only) package
   2. Generate CN23 Label.
   3. Pay order.
   4. Check tracking information
3. Support Tickets.
4. Email notifications
5. System will support two languages. English and Portuguese. (we can use already added translations)
6. Wherever units will be used we will have conversion in other units. USA use lbs/in but Brzil use kg/cm. so system will have option to change units.

System will have NCM/Harmonizing code Database for live searching and matching if user is entering correct NCM code when creating invoice. I’ve got excel file we can import that file in system for this purpose.

States Database and seeders already in old system we can use those.

**Major modification we will have in our system and things to keep from old system:**

User interface will remain same for pre alerts and order. We will improve order edit, extra services and payment interface.

In backend we will remove three table (shipments, pre alerts and orders) and will make only one table of orders. And we will handle status of orders. Like pre alert, ordered, paid, shipped.

For consolidation we will have relationship of orders-orders. One order can have many orders when consolidated. So, for this identification we will have a column in orders table name **order type**. (consolidated, single.) two status (**consolidation request, consolidated**) for this purpose will be added to orders status.

Every order will have these fixed optional prompts from user,

**contains\_battery, contains\_perfume, contains\_flammable\_liquid**

we will make order processing in wizard now as BPS is doing.

You may test thing on BPS uses these credentials.

<https://bringerparcel.dev/>

User : 'hercoff';

Password: Herco2019!';

**New features:**

New feature we have to think about are.

1. Bulk creation of orders for accounts like wholesale etc.
2. Bulk payment option for wholesale like account because if they process 100 packages and pay every time using cards there cards gets blocked.
3. More documents I’ll share with you..