**Customer Role**

1. **Main Web Site**
   1. pricing plans (Based upon no of User/Year ). Eg 10/Year.

1.2 Enquiry Form.

**2. Admin Panel**

* 1. **User**.
     1. User List.
     2. Search User.
     3. Create User.
     4. Update User.
     5. Delete User.
     6. User Permission.
  2. **Branch**
     1. Branch List.
     2. Search Branch.
     3. Create Branch.
     4. Update Branch.
  3. **Policy Master**
     1. Policy List.
     2. Search Policy.
     3. Create Policy.
     4. Update Policy.
  4. **Lead Generator**.
     1. Enquiry List.
     2. Lead List.
     3. Search Lead.
     4. Create Lead.
     5. Update Lead.
     6. Delete Lead.
     7. Assign Lead.
  5. **Lead Fallow up**.
     1. Lead List to assigned user.
     2. Create Schedule.
     3. Schedule Notification.
     4. Location Tracking.
     5. Duration Tracking.
     6. Create MOM.
     7. Create allowance.
     8. Reschedule Meeting or close lead.
  6. **Quotation**.
     1. Create Quotation.
     2. Recreate Quotation.
     3. Close Lead.
  7. **Sales Order**
     1. Sales Order List.
     2. Search Sales Order.
     3. Create Sales Order.
     4. Update Sales Order.
  8. **Sales Contract**
     1. Sales Contract List.
     2. Search Contract Order.
     3. Create Contract Order.
     4. Update Contract Order.
  9. **Sales Invoice**
     1. Sales Invoice List.
     2. Search Invoice.
     3. Sales Order Confirmation (dispatch/service).
     4. Sales Order Confirmation (Account department). \*Optional as per branch Configuration
     5. Create Sales Invoice.
     6. Update Sales Invoice.
  10. **Receipt Voucher**
      1. Receipt Voucher List.
      2. Search Voucher List.
      3. Create Receipt Voucher (Payment/Advance/Credit Note).
      4. Update Receipt Voucher.
      5. Delete Receipt Voucher.
  11. **Invoice Follow-up**
      1. Invoice fallow-up list.

# **Generic Use Cases**

1. **Enable/Disable Record(s)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Enable/Disable | **Use Case No.** | UC001 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
|  |  | | |
| **Description:** | Enabling/Disabling the specified record. | | |
| **Actors:** | Admin(s) who has the permission of module. | | |
| **Preconditions:** | 1. User must login into system. 2. User has the disable/enable permission. | | |
| **Form element(s)** | N/A | | |
| **Flow:** | 1. Click on the action button. 2. Click on enable/disabled button. 3. Alert should come. 4. On click Yes, Disabled button. | | |
| **Post conditions:** | 1. On click disabled button, Alert should open. 2. On click, **Yes, Disabled button** -> Status should change to Inactive. 3. Record should not list anywhere accept master list. 4. In-active record(s) cannot be used further to add in Transaction module(s). 5. Inactive record(s) cannot be edited. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | N/A | | |

1. **Clear Filter(s)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Clear filter(s) | **Use case No.** | UC002 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
|  |  | | |
| **Description:** | Reset/cleared the applied filter | | |
| **Actors:** | Admin(s) who has the permission of the module. | | |
| **Preconditions:** | 1. User must login into system. 2. User have module permission 3. **Clear button** must be available on the page. | | |
| **Flow:** | 1. Press the CLEAR button. | | |
| **Post conditions:** | 1. List must be refreshed or show the default record(s) | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data available -> List will be empty. | | |
| **Requirements:** | N/A | | |

# **Dashboard**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Dashboard | **Use case No.** | UC003 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
|  |  | | |
| **Description:** | Customer Dashboard Show all required information according to User like: - Total Customer, Total Revenue. | | |
| **Actors:** | Admin(s) who has the permission of the module. | | |
| **Preconditions:** | 1. User must have login first 2. User must have permission for access the dashboard | | |
| **Flow:** | 1. Chart for No of Customer Registered Per State. 2. Chart for No of Customer Registered Per Product. 3. Chart for No of Customer Registered Per Services. 4. Chart for Customer Revenue Per Month. 5. Chart for No of Customer Registered Per Month. | | |
| **Post conditions:** | 1. If user has a admin role than show all data in list. 2. If user has a Manager role than show only Respective Department all data. 3. If user has a User role than show only user created or assigned data. | | |
| **Alternative Flows:** | 1. Admin can filter data of main dashboard by date time picker 2. Admin can reset filter on click of reset button. | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

# **User**

## **Add User**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add User | **Use case No.** | UC004 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Add User module use for Create New User account. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add User Master. 3. User list should be come order by Created Date Descending. 4. User Email/Mobile No. must be Unique. | | |
| **Flow:** | 1. Name\* | | |
| **Post conditions:** | Data should be filter by user name and also clear button for filters | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **User List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | User list | **Use case No.** | UC005 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | User List Module is a view part. Admin can show about user information and change status active/inactive. There are 3 more option available in action column   1. Edit. 2. Delete. 3. Permission. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | Following are the details of the user that will be displayed in the list-   1. First Name 2. Last Name 3. Mobile (Must be Unique) 4. Email (Must be Unique) 5. Department 6. Is Manager (True/False) 7. Status (Active/Inactive) 8. Action Button (Edit and delete) | | |
| **Post conditions:** | User list from the database should loaded. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case | | |

## **Search User**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search User | **Use Case No.** | UC006 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 20/02/2020 | **Last Revision Date:** | N/A |
| **Description:** | Search the User based on applied filter(s). | | |
| **Actors:** | Admin(s) who has the permission of User list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by User name. | | |
| **Flow:** | 1. Search by User Name. 2. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried User(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Actions**

### **Edit User**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add User | **Use case No.** | UC007 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Admin can modify existing user’s details | | |
| **Actors:** | Admin(s) who has the permission of the User module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. 3. User list should be come order by Created date descending. 4. User mobile/email must be Unique. | | |
| **Flow:** | User Edit option user data will be reload and after that admin can modify details and after the submit user information will be update in DB. | | |
| **Post conditions:** | 1. On successful data updating, final data must be updated into database. 2. On successful data updating user must redirect to User list with success message. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **User Permission**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | User Permission | **Use case No.** | UC008 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | On permission window admin can add or modify permission. | | |
| **Actors:** | Admin(s) who has the permission of the User module. | | |
| **Preconditions:** | 1. User has login first | | |
| **Flow:** | On permission popup exiting permission will be load and admin can able to assign or remove each modules permission. | | |
| **Post conditions:** | 1. On successful data updating, final data must be updated into database. 2. On successful data updating user must redirect to User list with success message. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

# **Branch**

## **Add Branch**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add Branch | **Use case No.** | UC009 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Add Branch module use for Create New Branch Master. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Branch Master. 3. Branch list should be come order by Created Date Descending. | | |
| **Flow:** | N/A | | |
| **Post conditions:** | All mandatory field cannot blank during submit. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Branch List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Branch list | **Use case No.** | UC010 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Branch List Module is a view part. Admin can show about Branch information and change status active/inactive. There are 1 more option available in action column  1. Edit. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | Following are the details of the Branch that will be displayed in the list-   1. Branch Name 2. User\_id (Drop Down of User List) 3. State 4. District. 5. Address. 6. Pin code. 7. GSTNO. 8. Status (Active/Inactive) 9. Action Button (Edit and delete) | | |
| **Post conditions:** | Branch list from the database should loaded. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case. | | |

## **Search Branch**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search User | **Use Case No.** | UC011 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 20/02/2020 | **Last Revision Date:** | N/A |
| **Description:** | Search the Branch based on applied filter(s). | | |
| **Actors:** | Admin(s) who has the permission of Branch list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by User name. | | |
| **Flow:** | 1. Search by Branch Name/ Pin code /Contact person mobile. 2. Search by State Name. 3. Search by District 4. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried Branch(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Actions**

### **Edit Branch**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add Branch | **Use case No.** | UC012 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 10/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Admin can update exiting branch details. | | |
| **Actors:** | Admin(s) who has the permission of the centre module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. 3. Branch list should be come order by Created date descending. | | |
| **Flow:** | Branch Edit option branch data will be reload and after that admin can modify details and then submit Branch information. The branch information will be update in DB. | | |
| **Post conditions:** | 1. On successful data updating, final data must be updated into database. 2. On successful data updating user must redirect to Branch list with success message. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

# **Policy**

## **Add Policy**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add Policy | **Use case No.** | UC013 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Add Policy module use for Create New Policy Master. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Policy Master. 3. Policy list should be come order by Created Date Descending. | | |
| **Flow:** | N/A | | |
| **Post conditions:** | All mandatory field cannot blank during submit. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Policy List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Policy list | **Use case No.** | UC014 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Policy List Module is a view part. Admin can show about Policy information and change status active/inactive. There are 2 more option available in action column   1. Edit. 2. Delete. | | |
| **Actors:** | Admin(s) who has the permission of the Policy module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | Following are the details of the Branch that will be displayed in the list-   1. Policy Name 2. Amount. 3. Status (Active/Inactive) 4. Action Button (Edit and delete) | | |
| **Post conditions:** | Policy list from the database should loaded. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case | | |

## **Search Policy**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search User | **Use Case No.** | UC015 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Search the Policy based on applied filter(s). | | |
| **Actors:** | Admin(s) who has the permission of Branch list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by Policy name. | | |
| **Flow:** | 1. Search by Policy Name. 2. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried Policy(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Actions**

### **Edit Policy**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Edit Policy | **Use case No.** | UC016 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Admin can update exiting Policy details. | | |
| **Actors:** | Admin(s) who has the permission of the Policy module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. 3. Policy list should be come order by Created date descending. | | |
| **Flow:** | Policy Edit option policy data will be reload and after that admin can modify details and then submit Policy information. The Policy information will be update in DB. | | |
| **Post conditions:** | 1. On successful data updating, final data must be updated into database. 2. On successful data updating user must redirect to Branch list with success message. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

# **Lead Generator**

## **Enquiry List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Enquiry List | **Use case No.** | UC017 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Enquiry module use for Create Lead after the fallow up. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Policy Master. 3. Enquiry list should be come order by Created Date Descending. | | |
| **Flow:** | Lead Manager have to fallow up and convert Enquiry into Lead. | | |
| **Post conditions:** | All mandatory field cannot blank during submit. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Lead List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Lead List | **Use case No.** | UC018 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | The lead module will be listed in the assigned user lead list.  Sales Manager can see all Lead. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Policy Master. 3. Policy list should be come order by Created Date Descending. | | |
| **Flow:** | Sales Member can check our lead list which are assigner by manager. | | |
| **Post conditions:** | All mandatory field cannot blank during submit. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Search Lead**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search Lead | **Use Case No.** | UC019 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Search the Lead based on applied filter(s). | | |
| **Actors:** | User(s) who has the permission of Lead list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by Client name. 2. Filter by mobile. 3. Filter by date. | | |
| **Flow:** | 1. Search by Lead Name. 2. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried Lead(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Add Lead**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add Lead | **Use case No.** | UC020 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Add Lead module use for Create New Lead Master. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Lead Master. 3. Policy list should be come order by Created Date Descending. | | |
| **Flow:** | Lead Manager Should able to create New Lead by using of add lead module | | |
| **Post conditions:** | All mandatory field cannot blank during submit. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

### **Edit Lead**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Edit Lead | **Use case No.** | UC021 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Sales Manager can update exiting Lead details. | | |
| **Actors:** | User(s) who has the permission of the Lead module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. 3. Lead list should be come order by Created date descending. | | |
| **Flow:** | Lead Edit option lead data will be reloaded and after that admin can modify details and then submit Lead information. The Lead information will be update in DB. | | |
| **Post conditions:** | 1. On successful data updating, final data must be updated into database. 2. On successful data updating user must redirect to Lead list with success message. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Assign Lead**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Assign Lead | **Use case No.** | UC022 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Assigned lead is a option to transfer the lead to user. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Policy Master. 3. Policy list should be come order by Created Date Descending. | | |
| **Flow:** | The lead will be listed in Lead manager and sales manager by default.  Both can able to assign that lead to sale member. | | |
| **Post conditions:** | All mandatory field cannot blank during submit. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

# **Lead Fallow up**

## **Lead List to assigned user**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Assigned lead list | **Use case No.** | UC023 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Only Assigned Lead list will be display in user own panel. | | |
| **Actors:** | User(s) who has the permission of the Lead module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Policy Master. 3. Policy list should be come order by Created Date Descending. | | |
| **Flow:** | Once lead assigned to user the then lead details will be display in user lead list module. | | |
| **Post conditions:** | Only Assigned lead will be display in list. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Create Schedule**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add Schedule | **Use case No.** | UC024 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Add Schedule module use for Create Meeting Schedule of Lead. | | |
| **Actors:** | User(s) who has the permission of the Lead Fallow-up module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Lead Master. 3. Schedule list should be come order by Created Date Descending. | | |
| **Flow:** | User Should able to create New Schedule by using of add Schedule module. | | |
| **Post conditions:** | All mandatory field cannot blank during submit. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

### **Schedule Notification**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Schedule Notification | **Use case No.** | UC025 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Current Date schedule is display in notification menu. | | |
| **Actors:** | User(s) who has the permission of the Lead Fallow up module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. 3. Lead list should be come order by Created date descending. | | |
| **Flow:** | N/A. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

### **Location Tracking (Mobile app)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Location Tracking | **Use case No.** | UC026 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | This module helps to track location. | | |
| **Actors:** | User(s) who has the permission of the Lead Fallow up module. | | |
| **Preconditions:** | 1. User has login first 2. Lead list should be come order by Created date descending. | | |
| **Flow:** | Once User go to meeting on client side then enable location tracking and once reach on destination then stop. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

### **Duration Tracking (Mobile app)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Duration Tracking | **Use case No.** | UC027 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | This module help admin to track Meeting Duration. | | |
| **Actors:** | User(s) who has the permission of the Lead Fallow up module. | | |
| **Preconditions:** | 1. User has login first | | |
| **Flow:** | Once User go to meeting on client side then click meeting and once close meeting then click stop meeting. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

### **Create MOM (App/Web)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | MOM | **Use case No.** | UC028 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Create MOM of meeting history. And also able to upload file attachment as per requirement. | | |
| **Actors:** | User(s) who has the permission of the Lead Fallow up module. | | |
| **Preconditions:** | 1. User has login first | | |
| **Flow:** | Once Meeting is done then user have to create Minute of meeting and add all details about meeting. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

### **Create Allowance (Mobile/Web).**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Add Allowance | **Use case No.** | UC029 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Create Allowance module to enter User allowance. | | |
| **Actors:** | User(s) who has the permission of the Lead Fallow up module. | | |
| **Preconditions:** | 1. User has login first | | |
| **Flow:** | Once Meeting is done then user can fill our allowance in create allowance module. And if allowance entry fallow as per policy master, then it is approved else pending for admin approval. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

### **Reschedule Meeting .**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Reschedule Meeting | **Use case No.** | UC030 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Create Another Meeting schedule after complete exiting meeting. | | |
| **Actors:** | User(s) who has the permission of the Lead Fallow up module. | | |
| **Preconditions:** | 1. User has login first | | |
| **Flow:** | Once User Complete Exiting schedule. Then he/she can able to create new Meeting Schedule. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

# **Quotation(Mobile/Web)**

## **Quotation List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Quotation list | **Use case No.** | UC031 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Quotation list window display all quotation history of a particular lead. | | |
| **Actors:** | User(s) who has the permission of the Quotation module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Quotation. 3. Policy list should be come order by Created Date Descending. | | |
| **Flow:** | . | | |
| **Post conditions:** | User can add quotation after successfully meeting status. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Create/Recreate Quotation**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Quotation Create or Recreate | **Use case No.** | UC032 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 12/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Here User can able to create quotation or after then negotiation again send quotation. | | |
| **Actors:** | User(s) who has the permission of the Quotation module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Quotation. 3. Policy list should be come order by Created Date Descending. | | |
| **Flow:** | 1. Once Meeting successfully done and sale member change status of meeting then user can able to send quotation. 2. User can able to send quotation on multiple time multiple time if client negotiate. 3. Only Last Quotation is activated and pass to billing for sale. 4. Quotation history Should be maintained. 5. User can also able to close lead if client is not agreed. 6. If Client accept quotation, then user can able to send sale order. | | |
| **Post conditions:** | User can add quotation after successfully meeting status. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

# **Sales Order**

## **Sales Order List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Sales Order List | **Use case No.** | UC033 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 15/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Sales order list Module is a view part. User can show about Sales Order information and change status active/inactive. There are 2 more option available in action column   1. Edit. 2. Delete. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add User Master. 3. User list should be come order by Created Date Descending. 4. User Email/Mobile No. must be Unique. | | |
| **Flow:** | N/A | | |
| **Post conditions:** | Data should be filter by user name and also clear button for filters | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Search Sales Order**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search Sales Order | **Use Case No.** | UC034 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Search the User based on applied filter(s). | | |
| **Actors:** | Admin(s) who has the permission of Sales Order list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by Client Name, Mobile, Email. | | |
| **Flow:** | 1. Input value in field. 2. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried Data(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Add Sales Order**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Create Sales Order | **Use case No.** | UC035 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Create Sale Order Module for create new sales order | | |
| **Actors:** | Admin(s) who has the permission of the Sales Order module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | After Quotation Approval by client. Sale Member can create Sales Order. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case. | | |

## **Update Sales Order**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Update Sales Order | **Use case No.** | UC036 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Update Sale Order Module for Update Exiting sales order | | |
| **Actors:** | Admin(s) who has the permission of the Sales Order module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | Sale Member can update Sales Order. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case. | | |

# **Sales Contract**

## **Sales Contract List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Sales Contract List | **Use case No.** | UC033 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Sales Contract list Module is a view part. User can show about Sales Contract information and change status active/inactive. There are 2 more option available in action column   1. Edit. 2. Delete. | | |
| **Actors:** | Admin(s) who has the permission of the user module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Sales Contract. 3. Sales Contract list should be come order by Created Date Descending. 4. Sales Order create when client accept quotation. | | |
| **Flow:** | N/A | | |
| **Post conditions:** | Data should be filter by user name and also clear button for filters | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Search Contract Order**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search Contract Order | **Use Case No.** | UC034 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Search the User based on applied filter(s). | | |
| **Actors:** | Admin(s) who has the permission of Sales Contract list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by Client Name, Mobile, Email, created dated range. | | |
| **Flow:** | 1. Input value in field. 2. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried Data(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Add Sales Contract**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Create Sales Contract | **Use case No.** | UC035 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Create Sale Contract Module for create new sales contract | | |
| **Actors:** | Admin(s) who has the permission of the Sales Contract module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | After Quotation Approval by client. Sale Member can create Sales Contract. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case. | | |

## **Update Sales Contract**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Update Sales Contract | **Use case No.** | UC036 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Update Sale Contract Module for Update Exiting sales Contract | | |
| **Actors:** | Admin(s) who has the permission of the Sales Contract module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | Sale Member can update Sales Contract. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case. | | |

# **Sales Invoice**

## **Sales Invoice List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Sales Order List | **Use case No.** | UC033 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Sales invoice list Module is a view part. User can show about Sales Invoice information and change status active/inactive. There are 2 more option available in action column   1. Edit. 2. Delete. | | |
| **Actors:** | Admin(s) who has the permission of the Sale Invoice module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add Sale Invoice Master. 3. Sales Order list should be come order by Created Date Descending. | | |
| **Flow:** | N/A | | |
| **Post conditions:** | Data should be filter by user name and also clear button for filters | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Search Sales Invoice**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search Sales Invoice | **Use Case No.** | UC034 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 16/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Search the User based on applied filter(s). | | |
| **Actors:** | Admin(s) who has the permission of Sales Invoice list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by Date Range. | | |
| **Flow:** | 1. Input value in field. 2. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried Data(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Add Sales Invoice**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Create Sales Invoice | **Use case No.** | UC035 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 17/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Create Sale Invoice Module for create new sales Invoice | | |
| **Actors:** | Admin(s) who has the permission of the Sales Order module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | After Quotation Approval by client. Sale Member can create Sales Order.  And after that Dispatch team / Service team Ensure that Sale order successfully deliver then invoice should be created. | | |
| **Post conditions:** | Once Invoice Has been successfully created then email will be sent on internal team and client email. | | |
| **Alternative Flows:** | Account Team approval is optional as per branch configuration. | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case | | |

## **Update Sales Invoice**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Update Sales Invoice | **Use case No.** | UC036 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 17/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Update Sale Invoice Module for Update Exiting sales invoice. | | |
| **Actors:** | Admin(s) who has the permission of the Sales Invoice module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | Sale Member can update Sales Invoice. | | |
| **Post conditions:** | I case of update invoice the same email will send on internal team and client email. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case | | |

# **Receipt Voucher**

## **Receipt Voucher List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Receipt Voucher List | **Use case No.** | UC033 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 17/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Receipt Voucher list Module is a view part. User can show about Sales Invoice Payment information and change status active/inactive. There are 2 more option available in action column   1. Edit. 2. Delete. | | |
| **Actors:** | Admin(s) who has the permission of the Receipt Voucher module. | | |
| **Preconditions:** | 1. User has login first 2. User and client has permission to add Receipt Voucher module. 3. Receipt Voucher list should be come order by Created Date Descending. | | |
| **Flow:** | User and client go to Sale Invoice list and click on payment button.  If payment added, then notification will be display on account team dashboard.  Once account team approve that payment then that particular payment entry is a valid entry. | | |
| **Post conditions:** | Data should be filter by Date range and also clear button for filters | | |
| **Alternative Flows:** | If payment is added by payment getaway, then no need to approval. | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case  1. User has valid permission to do the next step task. | | |

## **Search Receipt voucher**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Search Receipt Voucher | **Use Case No.** | UC034 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 17/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Search the User based on applied filter(s). | | |
| **Actors:** | Admin(s) who has the permission of Receipt Voucher list module. | | |
| **Preconditions:** | 1. User must login into system. 2. User must be there in the list. 3. **SEARCH Button** must be there. | | |
| **Filter(s)** | 1. Filter by Date Range, Payment Mode. | | |
| **Flow:** | 1. Input value in field. 2. Click on **SEARCH** button. | | |
| **Post conditions:** | Queried Data(s) should be listed. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | In case of no data match -> empty list will be fetched. | | |
| **Requirements:** | N/A | | |

## **Add Receipt Voucher**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Create Receipt Voucher | **Use case No.** | UC035 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 17/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Create Receipt Voucher Module for create new Receipt Voucher. | | |
| **Actors:** | Admin(s) who has the permission of the Receipt voucher and client as well. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | User and client go to Sale Invoice list and click on payment button.  If payment successfully added, then notification will be display on account team dashboard.  Once account team approve that payment then that particular payment entry is a valid entry. | | |
| **Post conditions:** | Once Payment Has been successfully created then email will be sent on internal team and client email. | | |
| **Alternative Flows:** | Account Team approval is optional as per branch configuration. | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case | | |

## **Update Receipt Voucher**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Update Receipt Voucher | **Use case No.** | UC036 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 17/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | Update Receipt Voucher Module for Update Exiting Payment Entry. | | |
| **Actors:** | Admin(s) who has the permission of the Receipt Voucher module. | | |
| **Preconditions:** | 1. User has login first 2. User has permission to add, update and status changes status. | | |
| **Flow:** | Account Member can update Receipt Voucher entry. | | |
| **Post conditions:** | I case of update Receipt Voucher the same email will send on internal team and client email. | | |
| **Alternative Flows:** | N/A | | |
| **Exceptions:** | N/A | | |
| **Requirements:** | The following requirements must be met before execution of the use case | | |

## **Invoice Payment Fallow-up**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Use Case:** | Payment Follow-up list | **Use case No.** | UC036 |
| **Created By:** | Sandeep Dubey | **Last Updated By:** | N/A |
| **Date Created:** | 19/04/2021 | **Last Revision Date:** | N/A |
| **Description:** | List of invoice fallow - up record. | | |
| **Actors:** | Admin(s) who has the permission of the invoice payment fallow-up module. | | |
| **Preconditions:** | The email will be shoot when the due date has over.. | | |
| **Flow:** | User define Due date period in customer master.  If due date exceeds then email will be fire as set interval. | | |
| **Post conditions:** | N/A | | |
| **Alternative Flows:** | If admin not set due date period, then user can also able to set due date period on invoice creation form. | | |
| **Exceptions:** | If admin already set due date period in customer master then user can’t override due date value. | | |
| **Requirements:** | The following requirements must be met before execution of the use case | | |