SKC Group LLC [](http://www.google.com/url?sa=i&rct=j&q=&esrc=s&frm=1&source=images&cd=&cad=rja&uact=8&docid=seLGs-in0W1PmM&tbnid=_Y0NmqWxPXFp1M:&ved=0CAUQjRw&url=http://farmbrain.com/&ei=0i3cU6DgDsawyASauICQDA&bvm=bv.72197243,d.aWw&psig=AFQjCNGKkpLZ6yiHnu-z6aoXNbf8AcS5ow&ust=1407024971228625)

2014

DBA Market Enablement

Business Specifications

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# Overall Process Flow



# Modules on Farmbrain



# User modules on Farmbrain Manager

## Users

The Farmbrain Manager will be used to assign UserIDs and Initial Passwords to the Users of the application and the access types for each user. The access type includes:

* Administrator with browse/read/add/edit/delete access to all data in the Farmbrain Manager
* Mobile App User with access to download the apk and download data for the customer assigned to this user
* Supplier Portal Lite User with ability to view Orders and enter Pricing information one product at a time
* Supplier Portal User with ability to View and Confirm Orders/ Shorts/ Delivery Dates and enter Pricing Information and Promotion informations

## Customer Registration

The Customer Registration process will include basic information about the Customer including the following fields to be captured. The Customer should be able to download the app from the app store and request membership as soon as the Admin approves the membership the user id will be provided in an email and customers can login using the Login credentials provided in the mail

|  |  |
| --- | --- |
| **Field Label** | **Comments** |
| Customer ID | Will be an autogenerated id tagged at the time of registration |
| Business Name | Business Name of the Customer |
| Business Owner | Business Owner’s / Manager’s Name |
| **Billto Address Line 1** |  |
| **Billto Address Line 2** |  |
| **Billto City** |  |
| **Billto State** |  |
| **Billto Country** |  |
| **Billto Zip** |  |
| **Billto Phone** |  |
| **Billto Fax** |  |
| **Billto Email** |  |
| **Billto Cell Phone** |  |
| **Shipto Address Line 1** |  |
| **Shipto Address Line 2** |  |
| **Shipto City** |  |
| **Shipto State** |  |
| **Shipto Country** |  |
| **Shipto Zip** |  |
| **Shipto Phone** |  |
| Shipto Fax |  |
| **Shipto Email** |  |
| **Shipto Cell Phone** |  |
| Preferred | Default to App notifications, option to change to fax/email/phone |
| DUNS |  |
| **Federal ID#:** |  |
| Hours of Operation | Optional information |
| Days Of Operation | Optional information |
| Website address: |  |
| **Delivery Days** | **Select which days deliveries should be scheduled** |
| Customer Group | Assign Customer Groups |
| Customer Document | Option to attach customer related document to the profile |
| Business Picture | Picture of the Business/ Shop/ Logo etc |

*\*\*\*Text in Red is mandatory*

Customer details will be settings in the Phone app for the Customer to be able to edit any details, all fields will not be editable e.g Customer Group, Customer Group will need to be added by the Admin in the Farmbrain Manager portal

Bill to Address in the Customer Regd form should give an option to be copied from Ship to with a checkbox saying “Same as Shipping Address”

## Supplier Registration

|  |  |
| --- | --- |
| **Field Label** | **Comments** |
| Partner ID | Will be an autogenerated id tagged at the time of registration (8 digits) |
| **Business Name** | **Business Name of the Supplier** |
| Business Owner | Business Owner’s / Manager’s Name |
| **Address 1** |  |
| Address 2 |  |
| **City** |  |
| **State** |  |
| **Country** |  |
| **Zip** |  |
| **Phone** |  |
| Fax |  |
| **Email** |  |
| Cell Phone |  |
| Preferred | Default to App notifications, option to change to fax/email/phone |
| DUNS |  |
| **Federal ID#:** |  |
| **Hours of Operation** |  |
| **Days Of Operation** |  |
| Service States | Check the States that are serviced by the Supplier |
| Website address: |  |
| Supplier Document | Option to attach supplier related document to the profile |
| Business Pic | Picture of the Business/ Shop/ Logo etc |

## Supplier -> Customer Relationship

This will define the Relationship or considerations that the SUPPLIER has for the CUSTOMER and includes the following (this is how the Supplier relates to the customer and does not include customer preferences for a supplier, a customer will always specify their preference via the favorite order profiles created) :

* The Sales manager of the Supplier managing the customer
* The Customer-Id used by the Supplier for the specific customer

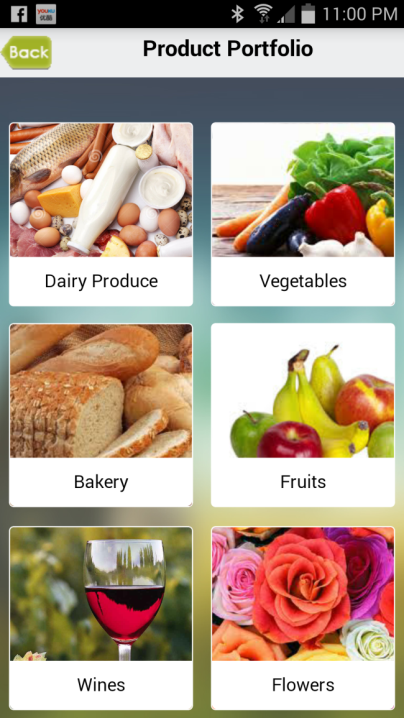
|  |  |
| --- | --- |
| **Field Label** | **Comments** |
| **Supplier ID** | **Supplier ID** |
| **Supplier Business Name** | **Business Name of the Supplier** |
| **Customer ID** | **Customer ID** |
| **Customer Business Name** | **Business Name of the Customer** |
| **Sales Manager ID** | **User ID of the Sales Manager** |
| **Sales Manager First Name** | **First Name of the Sales Manager** |
| **Sales Manager Last Name** | **Last Name of the Sales Manager** |
| **Supplier’s Customer ID** | **Customer ID in Supplier Systems** |
| **Minimum Order Value** | **Minimum Order Value for the Customer** |
| **Order Value Tolerance %** | **Order Tolerance value that will be used to provide the “Confirm” button** |

## Product Portfolio

This is the Master List of All products available in the DBA Universe categorized and Sub-Categorized as below:

The Product Portfolio should display as a Category on top as a heading and then Sub-Categories with a picture below as a scrollable, The User will be able to click on a Subcategory and see all the Products in that Subcategory. The Category will be like an Expandable Bar and can be minimized as and when needed to scroll.

|  |  |
| --- | --- |
| **Category** | **Sub-Category** |
| DRY | Flour/Grains |
| DRY | Sugar/Sweeteners/Syrup |
| DRY | Oil/Shortening |
| DRY | Fillings |
| DRY | Icings |
| DRY | Mixes/Bases |
| DRY | Nuts |
| DRY | Chocolate |
| DRY | Canned |
| DRY | Cookies/Crumbs/Shells |
| DRY | Fruit/Vegetables |
| DRY | Spices/Flavors/Colors |
| DRY | Packaging |
| DRY | Miscellaneous |
| Refrigerated | Yeast |
| Refrigerated | Cheese |
| Refrigerated | Butter |
| Refrigerated | Eggs |
| Refrigerated | Milk/Cream |
| Refrigerated | Miscellaneous |
| Frozen | Pies |
| Frozen | Muffins&Batters |
| Frozen | Breads/Rolls |
| Frozen | Pastries |
| Frozen | Cookies |
| Frozen | Cakes |
| Frozen | Donuts |
| Frozen | Bagels |
| Frozen | ArtisanBreads |
| Frozen | Toppings |
| Frozen | Fruit/Vegetables |
| Frozen | Miscellaneous |
| Fresh | Fresh |



On Clicking a Sub-Category, it will list all Products under that sub-category in similar display format

SUB-CATEGORY

SUB-CATEGORY

SUB-CATEGORY

SUB-CATEGORY

SUB-CATEGORY

SUB-CATEGORY

CATEGORY

Information Captured for each Product:

|  |  |
| --- | --- |
| Field Label | Comments |
| **Product ID** | Autogenerated ID : Created at the time of product is registered |
| QR Code | QR Code generated for the Product |
| **Product Label** | Label Description |
| **Product Description** | Product Description |
| **Category** | Category |
| **Sub-Category** | Sub-Category |
| **Brand** | Brand |
| **Unit of Measure** | EA/ LBS etc |
| **Pack Quantity** | Standard pack qty |
| **SKU UPC** | UPC of the item (EA) |
| **Case Qty** | Quantity in a case |
| Case GTIN | Case GTIN |
| **Case Weight** | Weight of the Case in LBS |
| Pallet Qty | Qty in eaches in a Pallet |
| Picture1 | Picture of the Product |
| File1 | Attachment |
| Shelf Life | Total Shelf life of the Product |
| Suggested Retail Shelf Life | Suggested Retail Shelf Life of the Product |
| **Product Manufacturer** | Manufacturer |
| Ingredients | Ingredients |
| Nutritional | Nutritional |
| Specifications | Specifications |
| Certificate Of Analysis (COA) | Certificate Of Analysis (COA) |
| Allergen Information | Allergen Information |
| Country of Origin | Country of Origin |
| GMO Statement | GMO Statement |
| Kosher | Kosher |

## Global Ordering Profiles

Global Ordering Profile list will be a filter on the Product Portfolio, Suppliers and Customers and some additional settings for the Profiles, there will be both Global Ordering Profiles and Personal Ordering Profiles (POP) in the system. The Global Ordering profiles will be created by the Administrator in the Farmbrain Manager and will be available on Mobile App as an option to use. The mobile app frontend can be used to order based on the Global Ordering profiles. These profiles can also be modified and “SAVED AS” personal profiles. Any changes done can only be saved as a Personal Profile. The Global profile can never be modified by any user on the app.

Functionalities in the Global Ordering Profile:

1. Filter on Products in the Product Portfolio using individual Products, a subcategory or a category level and keep adding as needed
2. Authorize a List of suppliers for all products
   1. Delist the Supplier or authorize a delisted supplier at a Product Level, at the Product level all Suppliers will be visible and the setting done for the Ordering profile will be visible, however the user can edit these settings at the product level and apply them. The Listing and delisting of suppliers is always done at a Product Level in the profile, the ability to do it at a higher level is provided as a convenience
3. Provide a Supplier Premium for List of suppliers for all products
   1. Change the supplier premium at a Product Level, at the Product level all Suppliers will be visible and the setting done for the Ordering profile will be visible, however the user can edit these settings at the product level and apply them. The Supplier premium is always stored at a Product Level in the profile, the ability to do it at a higher level is provided as a convenience
   2. The Supplier premium is used by the Ordering process to index the prices of the allowed supplier for that product e.g. see table below:

The Supplier Settings at a product level will look like this:

|  |  |  |  |
| --- | --- | --- | --- |
| Product | Supplier | Listed | Premium |
| A001 | Esh Foods | Yes | 10% |
| Zilka | Yes | 0% |

Now in this case lets say this is for Customer XYZ and pricing table looks like below, in this case Esh Foods price will be reduced by 10% (ONLY FOR COMPARING THE SUPPLIER the ACTUAL PRICE WILL NEVER BE TOUCHED). Therefore Esh foods will come at $98.10 and comparing to Zilka it is less by $1.90 and hence Esh will be selected as the Supplier. Incase of a tie the one with the premium will be selected

**REPEAT** – THIS WAS ONLY DONE TO COMPARE SUPPLIERS, PRICE WILL NOT BE CHANGED IN THE ORDER

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Product** | **UPC** | **Product Description** | **Supplier** | **Supplier's Product #** | **Customer Group** | **Customer** | **Customer's Product #** | **Sales Manager** | **Minimum Order Qty** | **Incremental Order Qty** | **Price** |
| A001 | 12345 | Royal Sugar 50Lbs | Esh Foods | E001 | DBA | XYZ | C001 | Joe Plummer | 1 | 1 | $109 |
| A001 | 12345 | Royal Sugar 50Lbs | Zilka | Z001 | DBA | XYZ | C001 | Joe Plummer | 1 | 1 | $100 |

1. Provide Product Substitution Rules
   1. Sub rules are defined at a product level and users can select alternate products that the supplier can sub when they are out of stock on a product in the order.
   2. It is assumed that the app will not do any qty conversion but while confirming the order the supplier must do a qty conversion in case the Product Weight or size are being changed
2. Provide Default Qty:
   1. The ability to select default qty and save it as a profile qty so whenever this profile is called, the default qty will be called and the user can then edit the qty as desired

# User modules on Farmbrain Supplier Portal

## Supplier Ordering & Pricing Module

The Supplier Ordering and Pricing module in Farmbrain Supplier Portal will be used by Suppliers to manage parameters for ordering by customers. The parameters are listed below and will be

|  |  |
| --- | --- |
| Field Label | Comments |
| Product | Farmbrain Product Code |
| UPC | UPC code of the Product |
| Product Description | Product Description |
| Supplier | Distributor |
| Supplier's Product # | Suppliers Product Code |
| Customer Group | Customer Group |
| Customer | Customer Name |
| Customer's Product # | Customers Product Code |
| Sales Manager | Sales Manager (to be used to filter the records that a user can see) |
| Minimum Order Qty (MOQ) | Minimum Order Qty for the Product |
| Date From | Effective Start Date of Pricing |
| Date To | Effective End Date of Pricing |
| Incremental Order Qty (IOQ) | Incremental Order Qty for the Product |
| Price | Price of the Product in $ |

The parameters maintained here by Suppliers in the portal will be used during the Order creation process, once the order is being generated the price will auto-populate and keep calculating the Order Totals. The Order total will also be a button and if pressed will give a pop-up giving dollar values for each supplier and if supplier minimum is met it will be mentioned.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **$750** | 🡨Popup on clicking the Order Total Button with $750 | | |  |
|  | Supplier | Order Value | Order Min | Tolerance |
|  | Esh Foods | 500 | 500 | 20% |
|  | Zilka | 250 | 750 | 40% |

If the Customer hits the Review Order button to review the order, he will not be able to see the Confirm PO button for Zilka’s order as he has not met the order minimum. Therefore the Button should only appear if the Order Minimum has been met for the particular supplier

Any MOQ and IOQ errors should also be highlighted as a popup for the order and Confirm PO button should be missing if MOQs and IOQs are not resolved.

PS: The Supplier in the Supplier portal is not bound by MOQ or IOQ so this logic will only trigger during the ordering process

## Promotions

There will be 2 types of promotions supported by the app and one event promotions. The Promotions will be as per below:

1. Off Invoice $ - The “Off-Invoice” promotions should show up as a bubble on the order guide as long as the product has a promotion, the user can click on the bubble and read the promotion and then make the order meet the criteria for the promotion i.e select the correct supplier, choose minimum order qty and then automatically the off invoice will be applied to the item. The off invoice will always be at an item level and not at an order total
2. Rebates – Rebates are also shown as a bubble of a different color and customer can check the items on rebate and then make the order meet the criteria for the rebate i.e select the correct supplier and minimum order qty if any. Rebate accruals will be calculated by the app AS A REPORT on Manufacturer or Supplier items purchased by different Customers
3. Price Increase – Price Increases are also shown as bubbles (maybe red exclamation marks) to help customers check if their supplier is increasing prices soon and stock up if they need to.

|  |  |
| --- | --- |
| Field Label | Comments |
| Product | Farmbrain Product Code |
| UPC | UPC code of the Product |
| Product Description | Product Description |
| Supplier | Distributor |
| Supplier's Product # | Suppliers Product Code |
| Promotion Type | Off Invoice OR REBATE |
| Date From | Start Date of Promotion |
| Date To | End Date of Promotion |
| Minimum Order Qty | Minimum Order Qty for the Promotion (1 by default) |
| Item Price | $100 |
| % off | % off or $ off will always work in tandem, i.e change one and other automatically changes |
| $ off |
| Promotion Text | Text Typed in to explain the promotion and shows up once the bubble is clicked |

## Promotional Event

A promotional event will be managed as a Global Order Guide profile that can be used once by a customer, this order guide profile will be called “Gardner Events” and will only have Gardner Products. The Order profile will never allow the user to enter more than the allowed qty of products as samples and on placing the order on the distributor, an invoice will be emailed to Gardner so that Gardner can pay the customer the $150 for the promotion.

Once the customer has used this Order Profile it will become dormant for that customer unless reactivated by the administrator to be used again. The reactivation will include cleaning up the data in a “Event” table where the usage is recorded.

## Orders Cockpit

The Orders cockpit in the Supplier portal will be used to manage orders, each user will only be able to see the orders that belong to his customers, e.g a Sales manager can only see his customers orders and a Supervisor can see orders for all his Sales Managers



The Orders Cockpit will be used to View, Confirm Orders and Delivery dates and once confirmed/ changed will edit the order on the mobile app also with the confirmation qty and notify the Customer through the app

# User modules on Farmbrain Mobile App

## User Login

## Order Profiles

Order Profile list will be a created by copying an existing global profile OR the Product Portfolio, it can be used additionally to filter Suppliers and Customers and carry out some additional settings for the Profiles, there will be both Global Ordering Profiles and Personal Ordering Profiles in the APP. The Global Ordering profiles will be created by the Administrator in the Farmbrain Manager and will be available on Mobile App as an option to use. The mobile app frontend can be used to order based on the Global Ordering profiles. These profiles can also be modified and “SAVED AS” personal profiles. Any changes done can only be saved as a Personal Profile. The Global profile can never be modified by any user on the app.

Functionalities in the Personal Ordering Profile:

1. Filter on Products in the Product Portfolio
2. Authorize a List of suppliers for all products
   1. Delist the Supplier or authorize a delisted supplier at a Product Level, at the Product level all Suppliers will be visible and the setting done for the Ordering profile will be visible, however the user can edit these settings at the product level and apply them. The Listing and delisting of suppliers is always done at a Product Level in the profile, the ability to do it at a higher level is provided as a convenience
3. Provide a Supplier Premium for List of suppliers for all products
   1. Change the supplier premium at a Product Level, at the Product level all Suppliers will be visible and the setting done for the Ordering profile will be visible, however the user can edit these settings at the product level and apply them. The Supplier premium is always stored at a Product Level in the profile, the ability to do it at a higher level is provided as a convenience
   2. The Supplier premium is used by the Ordering process to index the prices of the allowed supplier for that product e.g. see table below:

The Supplier Settings at a product level will look like this:

|  |  |  |  |
| --- | --- | --- | --- |
| Product | Supplier | Listed | Premium |
| A001 | Esh Foods | Yes | 10% |
| Zilka | Yes | 0% |

Now in this case lets say this is for Customer XYZ and pricing table looks like below, in this case Esh Foods price will be reduced by 10% (ONLY FOR COMPARING THE SUPPLIER the ACTUAL PRICE WILL NEVER BE TOUCHED). Therefore Esh foods will come at $98.10 and comparing to Zilka it is less by $1.90 and hence Esh will be selected as the Supplier. Incase of a tie the one with the premium will be selected

**PS**– THIS WAS ONLY DONE TO COMPARE SUPPLIERS, PRICE WILL NOT BE CHANGED IN THE ORDER

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Product** | **UPC** | **Product Description** | **Supplier** | **Supplier's Product #** | **Customer Group** | **Customer** | **Customer's Product #** | **Sales Manager** | **Minimum Order Qty** | **Incremental Order Qty** | **Price** |
| A001 | 12345 | Royal Sugar 50Lbs | Esh Foods | E001 | DBA | XYZ | C001 | Joe Plummer | 1 | 1 | $109 |
| A001 | 12345 | Royal Sugar 50Lbs | Zilka | Z001 | DBA | XYZ | C001 | Joe Plummer | 1 | 1 | $100 |

1. Provide Product Substitution Rules
   1. Sub rules are defined at a product level and users can select alternate products that the supplier can sub when they are out of stock on a product in the order.
   2. It is assumed that the app will not do any qty conversion but while confirming the order the supplier must do a qty conversion in case the Product Weight or size are being changed
2. Provide Default Qty:
   1. The ability to select default qty and save it as a profile qty so whenever this profile is called, the default qty will be called and the user can then edit the qty as desired

## Order Placement

### Create Order

The order can be created by the following mechanisms:

1. Using a Personal or Global Ordering Profile –
   1. The User can select a profile created and place an order by modifying the qty, Supplier and Supplier parameters in the Order thus being created
   2. The User can also modify sub rules if needed
   3. The updates are realtime to the order value and values and user can at anytime check what the order value is and on clicking the Total Order value there will be a pop-up providing value by supplier and highlighting if minimums are met or not
   4. The User can then hit “REVIEW” and Review the orders thus created on the Suppliers. If Suppliers’ minimums are met the user will see the “CONFIRM” buttons for each supplier and will be able to place orders on each supplier separately
2. Using a previous order and then making changes the same way as above, it basically works as a Personal Ordering profile

**Stoltzfus Bakery**

**+ Add Product $ 750**

CBA

BA

A

|  |  |  |
| --- | --- | --- |
| **1** | **2** | **3** |
| **4** | **5** | **6** |
| **7** | **8** | **9** |



**Or Number Pad comes up if clicked on the Qty cell**

**C:\Users\dutch_000\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9JPOV1DL\MC900250839[1].wmf**

Price

Dist A

Last QTY

**Last Order Date**

**50# Pillsbury Full Strength Flour**

**Qty \_\_\_**

**DONE**

**Review**

EDCBA

DCBA

1. Refers to DBA rebate items
2. Refers to special promotion – distributor or manufacturer
3. Open item details
4. Open to see all approved vendors with item available & price – ability to assign a distributor in a pop-up regardless of price.
5. Open to see any scheduled price adjustments – also possibly highlight when Price increase is pending the following week. Yellow on the week it does change as a reminder of change.

Scroll through the guide and the bottom will have a window for order review/confirmation. Next page will be order review by distributor and the awarded lines

### Review and Edit Orders

Top will be dashboard summary which will have Total $ / Total Pieces / # Deliveries (opens to schedule by day with dist listed below or next to day/date.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Total  $985.26 | Total Pieces  25 | Total Deliveries  2 *(see above)* | ?? | ?? |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Esh Foods | Total Purchase $421.96 | Total Pieces 11 | Delivery Day Wed 7/30(opens for special delivery request) | Approximate Delivery Time: 7:00(opens for special delivery request) |  |
| Line 1 Description | $17.95 | *(Qty)* 3 | Ext $53.85 | Edit | Trash/delete (Must confirm delete) |
| Line 2 Description | $34.56 | *(Qty)* 1 | $34.56 | “” | “” |
| Line 3 Description | $47.65 | *(Qty)* 7 | $333.55 | “” | “” |

**Confirm**

\*\*Dollar minimum may not be met if distributor is OK with a relaxed order minimum

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| http://zilkaandcompany.com/images/zilkalogo01.pngZilka Company | Total Purchase $563.30 | Total Pieces 14 | Delivery Day Thur. 7/31 (opens for special delivery request) | Approximate Delivery Time: 7:00 (opens for special delivery request) |  |
| Line 1 Description | $22.60 | *(Qty)* 8 | Ext $180.80 | Edit | Trash/delete (Must confirm delete) |
| Line 2 Description | $56.85 | *(Qty)* 2 | $113.70 | “” | “” |
| Line 3 Description | $67.20 | *(Qty)* 4 | $268.80 | “” | “” |

**Confirm**

### Submit Orders

The Confirm button is used to Submit orders and as soon as the orders are submitted, the are visible in the Supplier Portal as a pending order that the supplier needs to confirm for qty and dates

### Order Confirmation and Notifications

Once the Supplier Confirms the Qty and Dates the customers are notified ONLY IF THERE ARE CHANGES else the confirmation qty is updated in the orders on the app alongwith the delivery date as promised..e.g of a confirmed order below:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| http://zilkaandcompany.com/images/zilkalogo01.pngZilka Company | Total Purchase $563.30 | Total Pieces 14 | Delivery Day Thur. 7/31 (opens for special delivery request) | Delivery Day Friday. 8/1 (opens for special delivery request) | Total Confirmed $428.90 |
| Line 1 Description | $22.60 | *(Qty)* 8 | $180.80 | *(Conf Qty)*8 |
| Line 2 Description | $56.85 | *(Qty)* 2 | $113.70 | *(Conf Qty)*2 |
| Line 3 Description | $67.20 | *(Qty)* 4 | $268.80 | *(Conf Qty)*2 |

### Order Receipt on Delivery

Once the Order is received by the customer, the receipt will be done for the order there will be an option to check all and edit individual items or check each individual item and note comments or take a picture incase of damages.

There will be an optional field to take **signature from the Driver** on comments recorded for shorts (not noted during confirmation by the supplier and caused by miss picks) or damages.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| http://zilkaandcompany.com/images/zilkalogo01.pngZilka Company | Total Purchase $563.30 | Total Pieces 14 | Delivery Day Thur. 7/31 (opens for special delivery request) | Delivery Day Friday. 8/1 (opens for special delivery request) | Total Received  $294.50 |
| Line 1 Description | $22.60 | *(Qty)* 8 | $180.80 | *(Conf Qty)*8 | *(Recd Qty )8* | | *C:\Documents and Settings\kohlig.AMER\Local Settings\Temporary Internet Files\Content.IE5\FNCA350P\MC900434669[1].wmf* |
| Line 2 Description | $56.85 | *(Qty)* 2 | $113.70 | *(Conf Qty)*2 | *(Recd Qty )2* | | *C:\Documents and Settings\kohlig.AMER\Local Settings\Temporary Internet Files\Content.IE5\FNCA350P\MC900434669[1].wmf* |
| Line 3 Description | $67.20 | *(Qty)* 4 | $268.80 | *(Conf Qty)*2 | *(Recd Qty)0* | | C:\Documents and Settings\kohlig.AMER\Local Settings\Temporary Internet Files\Content.IE5\FNCA350P\MC900434669[1].wmf |

**Confirm Receipt**

### Order Cancellations

Order Cancellations are allowed by noon the day before delivery

### Supplier invoicing

The Suppliers will invoice on Receipt qty as above, but will not use Farmbrain, the invoicing is offline and not done in the app

## Sharing App

### Customer -> Customer

The Customer should be able to share the app with another customer through various mechanisms on the phone including but not limited to email, text, whatsapp, etc. This will have a set of content to be predetermined and sent along with the medium. In addition to the text content it should contain a hyperlink to download the app

### Customer -> Supplier

The Customer should be able to share the app with a supplier through various mechanisms on the phone including but not limited to email, text, whatsapp, etc. This will have a set of content to be predetermined and sent along with the medium. In addition to the text content it should contain a hyperlink to a website which explains the DBA program to the Suppliers

# Reporting & Alerts

## Order History

Order history screen (not a report) will have a history of all orders placed, cancelled or received by the Customer and categorized under these 3 heads:

1. Open Orders
2. Confirmed Orders - Unchanged
3. Confirmed Orders - Changed
4. Received Orders
5. Canceled Orders

## Movement Reports

This report will have 3 variant reports, one report variant will have movement by Month and will have the following layout and Selection screen

Report 1 – Monthly movement report:

Selection filters:

1. Selectable/ Filter on all Attributes
2. Select whether you want to see only Qty, only $ or Both, Average price may need to be calculated in the back-end
3. Select Date Range or Selection of months (default is all Months upto Current month of the year)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Attributes (Expandable)** | | | | | | | **Values** | | | | | | | | |
| Jan-14 | | | Feb-14 | | | Mar-14 | | |
| Category |  |  |  |  |  |  | Qty | $ | AvPr | Qty | $ | AvPr | Qty | $ | AvPr |
|  | SubCat |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Brand |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  | Product |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | Supplier |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | Mfg |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  | Customer |  |  |  |  |  |  |  |  |  |

The 2nd variant of the movement report will be a Comparison report comparing Month on month (MOM)

Selection filters:

1. Selectable/ Filter on all Attributes
2. Select whether you want to see only Qty, only $ or Both, Average price may need to be calculated in the back-end
3. Date Range is not applicable as it only runs for current month to date and previous month (complete)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Attributes (Expandable)** | | | | | | | **Values** | | | | | | | | |
| Current Month | | | Previous Month | | | MOM Variance | | |
| Category |  |  |  |  |  |  | Qty | $ | AvPr | Qty | $ | AvPr | Qty | $ | AvPr |
|  | SubCat |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Brand |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  | Product |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | Supplier |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | Mfg |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  | Customer |  |  |  |  |  |  |  |  |  |

3rd Variant will be the YTD comparison with previous year:

Selection filters:

1. Selectable/ Filter on all Attributes
2. Select whether you want to see only Qty, only $ or Both, Average price may need to be calculated in the back-end
3. Previous Year will give 2 options
   1. Complete Year
   2. This day last year – In this selection if you run this report on 8/30/2014, the Previous Year Data will be the aggregation of all data uptil that date)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Attributes (Expandable)** | | | | | | | **Values** | | | | | | | | |
| Current Year  (to Date) | | | Previous Year  (to date) | | | YOY Variance  (to Date) | | |
| Category |  |  |  |  |  |  | Qty | $ | AvPr | Qty | $ | AvPr | Qty | $ | AvPr |
|  | SubCat |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Brand |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  | Product |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  | Supplier |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | Mfg |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  | Customer |  |  |  |  |  |  |  |  |  |

The same report are also available on the Web Portal with an additional attribute “Customer Group” not available on the App

## Service Levels

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Attributes (Expandable)** | | | | | | **Values** | | | | | | |
| Shorts | | | On time Delivery | | | Total Service Level |
| # Short Events | # of total Events | Service Level | # of changed Dly | # of total Dly | On time Service |
| Supplier 1 |  |  |  |  |  | 20 | 200 | 90% | 5 | 20 | 75% |  |
|  | Cat |  |  |  |  |  |  |  |  |  |  |  |
|  |  | SubCat |  |  |  |  |  |  |  |  |  |  |
|  |  |  | Brand |  |  |  |  |  |  |  |  |  |
|  |  |  |  | Product |  |  |  |  |  |  |  |  |
|  |  |  |  |  | Customer |  |  |  |  |  |  |  |

Total Service Level is calculated at line item level with the following formula:

* Number of events = Total # of line items ordered to the Supplier
* Perfect Service events = Total # of line items delivered in full and on time
* Total Service Level = (Serviced Events/ Number of Events)%

The same report are also available on the Web Portal with an additional attribute “Customer Group” not available on the App

## Marketing Reports

Promotions and Accrual Report

1. Selectable/ Filter on all Attributes
   1. Select Whether you want to see Promotion benefit or Accruals (only one must be chosen) and the report layout will be as per below

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Attributes (Expandable)** | | | | | | | **Values** | |  |  |  |  |
| Current Quarter | | Previous Quarter | | QOQ Variance | |
| Customer |  |  |  |  |  |  | Qty | Reward | Qty | Reward | Qty Var | $ Var |
|  | Mfg |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Supplier |  |  |  |  |  |  |  |  |  |  |
|  |  |  | Cat |  |  |  |  |  |  |  |  |  |
|  |  |  |  | SubCat |  |  |  |  |  |  |  |  |
|  |  |  |  |  | Brand |  |  |  |  |  |  |  |
|  |  |  |  |  |  | Product |  |  |  |  |  |  |

The same report are also available on the Web Portal with an additional attribute “Customer Group” not available on the App

## DBA Commission Report

DBA commission will be calculated by Customer, Customer table will have the commission %,

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Attributes (Expandable)** | | | | | | | | **Values** | |
| Sales Receipts $ | Commission |
| CustGrp |  |  |  |  |  |  |  |  |  |
|  | Customer |  |  |  |  |  |  |  |  |
|  |  | Supplier |  |  |  |  |  |  |  |
|  |  |  | Category |  |  |  |  |  |  |
|  |  |  |  | SubCat |  |  |  |  |  |
|  |  |  |  |  | Brand |  |  |  |  |
|  |  |  |  |  |  | Product |  |  |  |
|  |  |  |  |  |  |  | Salesman |  |  |

This report is only available on the Web Portal

## Notifications

### Mobile App for Customer

The Customer will get the following notifications:

1. If there are any changes made by the Supplier on the order during confirmation, if the order is not changed no notifications should be sent
2. If there is a delivery scheduled after X hours, the notification setting should be sent, this “X” should be on the customer master and customers can set it whatever they want it to be and can edit later through the app

### Supplier Notifications

1. Order is Placed – Once order is placed there should be a alert/ notification on the Supplier portal, it could just be a Amber highlighted text for New Orders that must be acted on. There should be an option to send a scheduled email to the Sales Manager email id for all NEW ORDERS that have not been confirmed for the day. Same orders should not be sent again
2. Order is Cancelled - Once order is cancelled there should be a alert/ notification on the Supplier portal, it could just be a Red highlighted text for Cancelled Orders that must be read. There should be an option to send a scheduled email to the Sales Manager email id for all CANCELLED ORDERS. Same orders should not be sent again
3. Order is received - Once order is received there should be a alert/ notification on the Supplier portal, it could just be a Green highlighted text for Received Orders that must be read. There should be an option to send a scheduled email to the Sales Manager email id for all RECEIVED ORDERS. Same orders should not be sent again

All these 3 notifications must be optional and Sales Managers can choose to get either one, two or all 3 notifications in an email.

# Data Base Design

## Customer, Admin and Supplier

## Product

## Order Profile

## Order

## Promotion

## Notification

## Promotional Event Table

## Reporting Tables (if needed)