



## Objective of Tech Track Winter Internship

Build a **FinTech B2B Order Management Application**

### Business Overview

#### **Introduction to order management and Approval Workflow**

Order Management is the core of any B2B or B2C company. Order management is the end to end process of receiving an order, processing it and driving it to fulfillment - based on the end goal.

Order management involves a series of interconnected touchpoints and stakeholders who work collaboratively together. The order fulfillment system (as it is also known) not only secures that order-to-cash (O2C) processes run smoothly, but also gives businesses the opportunity to build customer profiles and keep track of inventory volume and sales records.

In the real work world- Different workflows are set up for different management activities based on certain rules and strategies. The relevant stakeholders (Eg Manager, Director etc ) along the corporate hierarchy are given different levels of approvals.

In the given problem statement - we will be building an order management application that has different approval workflows. We will enable a user to add and edit orders and get them fulfilled (i.e. approved/rejected) based on the order amount.

# Problem Statement for Application Development

The objective of the winter internship project is:

- To build an **Order Management Application**
- Build an **Order Dashboard** and a **Login page**.
- **Add and Edit order data** in the editable fields of the grid.
- Perform **Searching** operations in the grid.
- Build an **approval workflow** that allows the user to approve or reject an order based on certain predefined rules and strategies.

## High Level Requirements Of Application

Specifically, below are the major aspects of the application that needs to be developed. The details for each of the below is provided in the functional overview section.

- a. Build UI for a login page and an orders dashboard .
- b. The UI should support searching and pagination operations.
- c. The UI should support editing of some editable fields.
- d. Based on approval flow, users should be able to approve or reject an order according to the order amount.

## Functional Overview

### 1. Approval Flow



Approval Workflow

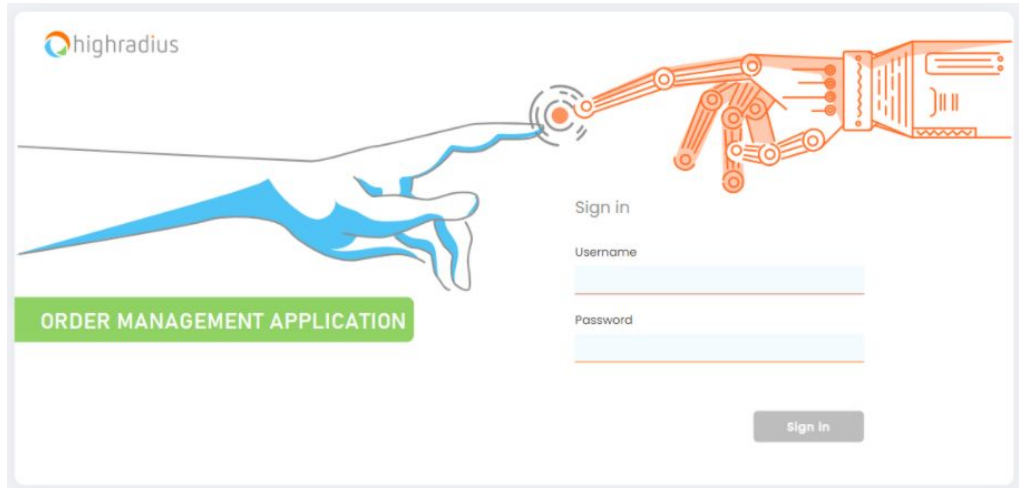
## 2. UI Representation

Two pages will be developed as part of the project

- Login Page
- Order Dashboard

### 1. Login Page

1. A standard login page with username , password and submit button to be developed.
2. HighRadius logo to be present on top.



3. Based on the login credentials, users can approve or reject orders till a certain range.
4. Below login credentials with the order amount mappings are to be maintained:

S No	Range of Order Amount	Username	Password	User Level
1.	<=10,000	David_Lee	Project@123	Level 1
2.	>10,000 and <=50,000	Laura_Smith	Project@1234	Level 2
3.	>50,000	Matthew_Vance	Project@12345	Level 3

## 2. Order Dashboard - Level 1 User Login

The UI header will consist of the HighRadius logo on top left and ABC Products logo to be present in the middle.



ABCPRODUCTS

ADD		EDIT						Search
Order Date	Approved By	Order ID	Company Name	Company ID	Order Amount	Approval Status	Notes	
07/08/2020	Alessandro	756462	May Corn	756462	INR 30897	Awaiting Approval	Pending Approval from John	
07/08/2020	Esmeralda	346433	Premium Fashion	346433	INR 1050	Approved	Approved by David	
07/08/2020	Alexandrea	346364	Coro Group	346364	INR 500000	Awaiting Approval	Pending Approval from John	
07/08/2020	Lucio	245527	Sav Manufacturer	245527	INR 4000	Approved	Approved by David	
06/08/2020	Melvina	982479	Mittal Steels	982479	INR 10000	Approved	Approved by Lisa	
06/08/2020	Kelli	357789	Pest Technologies	357789	INR 6791	Approved	Approved by David	
03/08/2020	Jaylen	812649	Permalink	812649	INR 705000	Awaiting Approval	Pending Approval from John	
03/08/2020	Roslyn	092783	Chefing Steps	092783	INR 5000	Awaiting Approval	Pending Approval from Shelly	
02/08/2020	Buford	123470	Invent Mobiles	123470	INR 423457	Awaiting Approval	Pending Approval from John	
02/08/2020	Nicklaus	232387	Collabra Tech	232387	INR 8900	Approved	Approved by David	

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Two buttons will be present on the left side above the grid

- Add
- Edit

- ❑ The Add and Edit Button will be present only for David\_Lee login.
- ❑ For Laura\_Smith and Matthew\_Vance the Add and Edit Button will be replaced by Approve and Reject buttons respectively.

By default, **edit button will remain disabled** without selection of any records.

The order grid will have the following column headers:

1. Order Date - Indicate the order create date
2. Order ID - Unique identifier for the order
3. Customer Name - Name of the customer
4. Customer ID - Unique ID for the customer
5. Order Amount - Represents the amount of order
6. Approval Status - This can be of three types:
  - Approved
  - Awaiting Approval
  - Rejected
7. Approved By- This can have 4 values
  - David Lee

- Laura Smith
  - Matthew Vance
  - <Blank> - When the approval status is Awaiting Approval
- Notes - Contains any text entered by the user.
  - Checkboxes will be present on the left side of each record - the user can click on the checkbox and the row should get highlighted.
  - Multiple selection of records **not** in scope.

<input type="checkbox"/>	38766	Health Information Center	Moderate	07/08/2020	0.00	0.00
<input type="checkbox"/>	429882	Largest Investment Firm	Moderate	07/08/2020	0.00	6,288.00
<input type="checkbox"/>	874298	Largest Retail Chain (Parent)	Low	07/08/2020	0.00	8,809.00
<input type="checkbox"/>	129854219	International Services Company	Low	07/08/2020	22,580.00	0.00
<input checked="" type="checkbox"/>	4861249	American Food Store	Low	06/08/2020	13,464.00	16,109.00
<input type="checkbox"/>	7234698	Largest Food Distribution Company	Low	06/08/2020	2,16,000.00	2,14,957.74
<input type="checkbox"/>	23454	Midwest Retailer Company	Low	03/08/2020	55,489.00	512.00
<input type="checkbox"/>	352353	Largest FootWare Company	Low	03/08/2020	0.00	2,352.00
<input type="checkbox"/>	43644	Information Technology Firm	Low	02/08/2020	0.00	0.00
<input type="checkbox"/>	4632323	National Service Company	Low	02/08/2020	0.00	0.00

## 2.1. Add Button

- Add button will allow the user to add an order in the grid.
- Clicking on the add button, a pop up window will be displayed on the screen.

The screenshot shows a mobile application interface. In the foreground, there is a white pop-up window titled "ADD ORDER" with a close button (X) in the top right corner. The window contains the following fields:

- Order ID
- Order Date
- Customer Name
- Customer Number
- Order Amount
- Notes

At the bottom center of the pop-up window is an orange button labeled "ADD". The background of the app shows a list of items with columns for item name, quantity, and price, though the text is partially obscured.

- The window will have field names same as the column headers i.e.

- Order Date
- Order ID
- Customer Name
- Customer ID
- Order Amount
- Notes

iv. The window will have an Add and Cancel button (cross button on top).

v. When a user clicks on the Add button in the window, the respective record should be displayed in the grid.

- *If the order amount entered by the user (i.e. David\_Lee) is  $\leq 10,000$  , the approval status for a new order will be **auto populated as Approved and Approved By column will display David Lee.***
- *If the order amount entered by the user (i.e. David\_Lee) is  $> 10,000$  and  $\leq 50,000$  , the approval status for a new order will be **auto populated as Awaiting Approval and Approved By column will be blank.***
- *If the order amount entered by the user (i.e. David\_Lee) is  $> 50,000$  , the approval status for a new order will be **auto populated as Awaiting Approval and Approved By column will be blank***

## 2.2. Edit Button

i. Edit button will enable the user to modify the notes and order amount fields only.

ii. Upon clicking the edit button, a pop up window will be displayed on the screen.

iii. The Edit window will have following fields:

- Order ID - Non Editable
- **Order Amount - Editable**
- **Notes - Editable**
- Approval By -

iv. The respective data points of the selected record i.e. order id, order amount , notes and approval by value should be displayed on the edit order window before editing.

By default - the order ID column should remain uneditable.

User change the order amount value and the notes value.

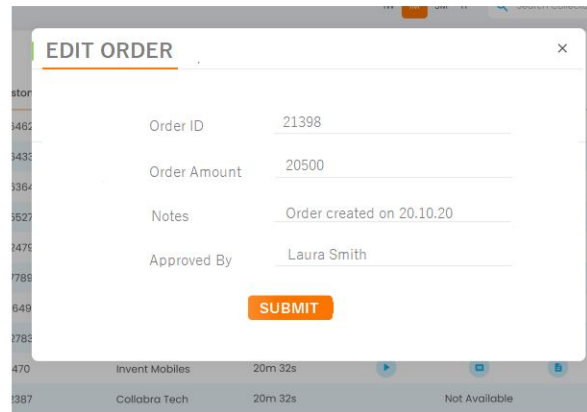
v. When user enters the order amount - **based on the amount range, the respective name must be Autopopulated in the Approval By field.**

- *For eg, If user enters 45,000, then the name "Laura Smith" should be auto*

*populated in the Approval By field.*

- *If the user enters 5,000, then the name "David Lee" should be auto populated in the Approval By field.*

vi. The window will have a Submit and Cancel button(cross button on top).



vii. When User clicks on Submit, the changes should be updated and displayed on the UI.

### 2.3. Search Button

- The search button is present on top right above the grid.
- The search functionality allows the user to search for an **order ID**.
- When the user enters the order ID - **the respective record is filtered in the grid**.

### 2.4. Pagination

- The pagination bar will be present on the bottom left of the screen.
- The respective pages will be shown as - Page 1 of 10.
- Clicking on single right arrow button will take the user to the **next page** and clicking on single left arrow will take the user to **previous page**.
- Clicking on the double right arrow button will take the user to the **last page** and clicking on double left arrow button will take the user to **first page**.

## 3. Order Dashboard - Laura Smith & Matthew Vance Login

The UI header will consist of HighRadius logo on top left and ABC Products logo to be present in the middle.

Two buttons will be present on the left side above the grid

- Approve

- Reject

highradius		ABCPRODUCTS					
APPROVE REJECT		Search					
Order Date	Approved By	Order ID	Company Name	Company ID	Order Amount	Approval Status	Notes
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The order grid will have the following column headers:

1. Order Date
2. Order ID
3. Customer Name
4. Customer ID
5. Order Amount
6. Approval Status
7. Approved By
8. Notes

- When the **Level 1 user (David Lee)** adds/edits an order in the range **>10,000 and <=50,000** - it should also reflect in the **Level 2 User** (Laura Smith) account with the same record details.
- Level 2 User can click on the checkbox to select the record, and then approve or reject it using the respective buttons.
- If none of the records are selected, the **approve and reject buttons** should remain **disabled**.

*If the user clicks on approve - the status should change from **Awaiting Approval to Approved**.*

*If the user clicks on Reject - the status should change from **Awaiting Approval to Rejected**.*



- When the **Level 2 user approves/rejects the order** - the respective **status and the Approved By value should be updated in the level 1 user.** (David Lee ) login as well.

Similarly,

- When the **Level 1 user (David Lee) adds/edits an order in the range >50,000** - it should also reflect in the **Level 3 User** (Matthew Vance) account with the same record details.
- Level 3 User can click on the row to select the record, and then approve or reject it using the respective buttons.

*If the user clicks on approve - the status should change from Awaiting Approval to Approved.*  
*If the user clicks on Reject - the status should change from Awaiting Approval to Rejected.*

- When the **Level 3 user approves/rejects the order - the respective status and the Approved By value should be updated in the level 1 user.** (David Lee ) login as well.

### 2.1. Search Button

i. The search functionality will remain the same as earlier and will allow the user to search for an order ID.

### 2.2. Pagination

i. Pagination will remain the same as earlier and will allow the user to browse through different pages.

## Optional Milestone

1. All the different UI screens developed should be responsive.
  - The screen resolution will be adjusted accordingly to test the responsiveness.
  - The UI shouldn't break when the screen is adjusted to different resolutions
2. The Dynamic Search functionality should be achieved.
  - The user should enter the first three digits of the order ID and all the matching records should be filtered in the grid below without hitting enter.
  - As the user enters more digits, the matching records should keep on filtering in the grid below.

## **Mock Up**

- ☐ [Login Page](#)
- ☐ [Level 1 User Dashboard](#)
- ☐ [Manager Dashboard](#)
- ☐ [Add Order Pop Up Window](#)
- ☐ [Edit Order Pop Up Window](#)

## **Glossary**

1. B2B - Business to Business
2. B2C- Business to Consumer
3. C2C - Consumer to Consumer

## **Recording Link**

[PRS Recording](#)