Business Requirements Document (BRD)

Feature: Marking Discrepant Invoices as Favorite

Application: ApWorks

Module: Discrepant Gadget & Invoice UI

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Version: 1.0

# 1. Background

In ApWorks, users manage problematic invoices using the Discrepant gadget, which lists invoices requiring attention. As the volume of discrepancies grows, users often want a simple way to mark or flag certain invoices they intend to revisit later. Currently, there is no native functionality for this, making it harder to track work-in-progress invoices.

# 2. Objective

Introduce a "Favorite" mechanism to allow users to easily mark and filter invoices they are actively working on or wish to follow up on. This feature will provide a visual indicator and a filtering option, helping users navigate high-volume discrepancy lists efficiently.

# 3. Scope

This enhancement will apply to:

- The Discrepant Gadget – for marking and filtering invoices.

- The Invoice UI – for toggling favorite status on individual invoices.

Note: This feature is only applicable to invoices currently in the Discrepant bucket.  
Note: This feature is applicable on all 3 modules (media , Broadcast and Production)

# 4. Functional Requirements

4.1 Discrepant Gadget Enhancements:

- A new column will be added to the gadget containing a star icon (☆/★) for each invoice.

- The column will have no header to avoid cluttering the interface.

- Clicking the icon toggles the status:

☆ = Not marked as favorite

★ = Marked as favorite (gold color)

- A tooltip will appear on hover:

“Mark as Favorite” when not marked

“Remove Favorite” when marked

- A new filter option in filter dropdown (we have 2 dropdowns, let’s finalize 1 to use in session) will allow users to display only their favorite invoices.

- **Favorite status will be user-specific without any role/group.**

4.2 Invoice UI Enhancements:

- When viewing a Discrepant invoice in the Invoice UI, an additional action button will appear:

“Mark as Favorite” or “Remove Favorite” depending on current status.

- Toggling the button updates the invoice's favorite status in real-time.

- The favorite status will be consistent across the Discrepant gadget and Invoice UI.  
  
4.3 The Discrepant gadget will **default to sorting invoices by Favorite status first**, followed by the existing **Scanned Date** order.

* Invoices marked as **favorite will appear on top**, and within that group, they'll be sorted by scanned date.
* Invoices not marked as favorite will appear below, also sorted by scanned date.

**Users can manually change the sorting** after the gadget loads.

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# 5. Business Rules

- Favorite functionality is limited to invoices in the Discrepant bucket.

- If an invoice leaves the Discrepant bucket, the favorite flag will be automatically removed.

- Favorite status is stored per user, not globally.

- Invoices cannot be marked as favorite from any other gadgets or modules.

# 6. Non-Functional Requirements

- The favorite icon must be lightweight and must not degrade the performance of the Discrepant gadget.

- UI actions (toggle, label change) must respond without requiring a full screen reload.

- Favorite status must be reliably saved in the backend/database.

- Tooltip messages should support localization for multi-language environments.

# 7. User Permissions

- All users with access to the Discrepant gadget or Invoice UI will have access to the favorite feature.

- No new roles, permissions, or configurations are required.

# 8. Risks & Mitigations

Risk: Visual clutter in the Discrepant gadget

Mitigation: Omit column heading, use minimal iconography

Risk: Misunderstanding about persistence

Mitigation: Tooltips and documentation will clarify that favorites apply only to Discrepant invoices

Risk: Requests for broader use or bulk action

Mitigation: Feature is intentionally scoped small for V1. Future phases can evaluate user demand

# 9. Out of Scope (V1)

- Bulk favorite/unfavorite actions

- Displaying or filtering favorites in non-discrepant modules

- Notification/alert triggers based on favorite status

- Shared (cross-user) favorites

# Database Change:

New table “apad\_user\_favorite\_invoice\_document”:

Following will be the columns of this table

company\_code, model\_def\_id, invoice\_document\_id, create\_date, create\_by

# UI Mockup A new column will be added in discrepant gadget to allow users to mark / remove invoice’s favorite status. There will not be any heading for this column because of limited space. user can mark invoice favorite by clicking in (\*) sign with each invoice.

Gadget sorting order will work as describe in functional requirements.  
we will add additional filter “Favorite Only” which will allow users to view only favorite invoices.

# A screenshot of a computer AI-generated content may be incorrect.

If invoice is in discrepant status, additional button (mark as favorite, remove favorite) will be available on Invoice UI screen to allow users toggle the favorite status of invoice.

A screenshot of a computer

AI-generated content may be incorrect.

# 10. Open Questions

Q1: Should the Favorite Feature Be Available on the Invoice Management UI?

Currently, this feature is limited to the Discrepant gadget and Invoice UI.  
[Asim Jamil] No need on Invoice Managment UI-

Question: Do we want to enable viewing or filtering by favorite status on the Invoice Management UI, for discrepant invoices?  
[Asim Jamil] Favorite icon will not show up in Manage Invoices Document screen.

Question: A new filter option in filter dropdown (we have 2 dropdowns, let’s finalize 1 to use in session) will allow users to display only their favorite invoices.

[Asim Jami] No filter is needed, user should be able to sort based on favorite column in Discrepant gadget.

**Pros:**

- Unified visibility across multiple modules

- Easier tracking without screen switching

**Cons:**

- Increased UI complexity

- Potential confusion if users expect it to apply to non-discrepant invoices

👉 Decision Pending