# Business Requirements Document (BRD)

## Unified Routing History Modal with Tabbed Interface

### 1. Objective

Enhance the existing 'Routing History' feature to support both Approval Routing and Discrepant Routing within a unified UI. This will improve auditability and visibility across all invoice statuses by displaying a tabbed interface with categorized routing logs.

### 2. Background

Currently, the application logs two types of routing actions:  
- Approval Routing: Used to assign invoices to approvers.  
- Discrepant Routing: Used to forward invoices during discrepancy resolution.  
  
Only Approval Routing is currently viewable via a 'Routing History' button, and only while the invoice is pending approval. Discrepant Routing, although logged, is not displayed in the UI. This limits the user's ability to trace the complete lifecycle of routing decisions.

### 3. Proposed Changes

The following enhancements will be made to the existing Routing History functionality:

* - The existing 'Routing History' button will be retained and made visible for all invoice statuses.
* - Clicking the button will open a modal with two tabs:  
   1. Approval Routing  
   2. Discrepant Routing

#### 3.1 Approval Routing Tab

- Shows Approval routing activity performed as part of the approval workflow.  
- Tab is visible only when the invoice is not in 'Discrepant' status.  
- Fields displayed:  
 - Routed by  
 - Routed to  
 - Timestamp  
 - Comments (if any)

#### 3.2 Discrepant Routing Tab

- Displays routing actions taken during discrepancy handling.  
- Tab is always visible, regardless of invoice status.  
- Fields displayed are the same as the Approval Routing tab.  
 -Routed by  
 - Routed to  
 - Timestamp  
 - Comments (if any)

If no data is present in a tab, display a message: 'No data available.'

### 4. Scope

UI:  
- Enhance the existing modal accessed via the 'Routing History' button.  
- Add tabbed interface.  
  
Backend:  
- No database changes required.  
- Use existing logs for both Approval and Discrepant routing.

### 5. Permissions

All users with access to the Invoice UI will be able to see the 'Routing History' button and view both routing history tabs.

### 6. Examples

Example 1: Invoice routed during discrepancy

- Routed by: John Doe  
- Routed to: Jane Smith  
- Date/Time: 2025-06-10 14:23  
- Comment: 'Please review the tax amount discrepancy.'  
→ This will appear under the 'Discrepant Routing' tab.

Example 2: Invoice routed for approval

- Routed by: FinanceBot  
- Routed to: Maria Khan  
- Date/Time: 2025-06-11 09:12  
- Comment: Please review the invoice.'  
→ This will appear under the 'Approval Routing' tab.

### 7 - UI Mockup / Flow

The existing **"Routing History"** button on the invoice screen will be enhanced to support both types of routing: **Approval Routing** and **Discrepant Routing**. This enhancement will consolidate both routing logs into a single, user-friendly modal interface without changing the button’s label or overall user flow.

**Routing History Button**

* The label remains **"Routing History"**.
* Button will now be **visible for all invoice statuses**, including Discrepant, Approved, and Posted.
* When clicked, it will open a **tabbed modal** containing two routing logs: one for approval and one for discrepancy handling.

**Tabbed Modal Layout**

The modal will display **two tabs** side-by-side:

* **Approval Routing**
* **Discrepant Routing**

This interface helps separate formal approval history from informal discrepancy resolution routing.

**8.2 Tab Details: What Each Tab Will Display**

**Approval Routing Tab**

* **Purpose**: Displays all approval-related routing actions where the invoice was routed to a designated approver.
* **Visibility**: Visible **only when the invoice is no longer in Discrepant status**.
* **Fields Displayed**:
  + **Routed By** – User/system who initiated the approval routing
  + **Routed To** – Approver selected
  + **Date/Time** – Routing timestamp
  + **Comment** – Optional notes provided by the routing user
* **Empty State**: If no approval routing entries exist, display: *“No data available.”*

**Example:**

Routed By: John Smith

Routed To: Emily Zhang

Date/Time: 2025-06-18 10:03 AM

Comment: “Needs urgent review.”

**Discrepant Routing Tab**

* **Purpose**: Displays all routing actions performed while the invoice was in Discrepant status — typically for clarification, data correction, or additional review.
* **Visibility**: **Always visible**, regardless of the status of the invoice.
* **Fields Displayed**:
  + **Routed By** – User who initiated discrepancy-related routing
  + **Routed To** – Target recipient
  + **Date/Time** – Routing timestamp
  + **Comment** – Reason or instruction tied to the discrepancy
* **Empty State**: If no discrepancy routing entries exist, display: *“No data available.”*

**Example:**

Routed By: Alice Roberts

Routed To: John Smith

Date/Time: 2025-06-15 2:43 PM

Comment: “Can you double-check the line-item amounts?”

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

### 8. Notes

This unified approach simplifies the user experience by consolidating routing views. It ensures traceability of both business and approval workflows without requiring navigation to separate parts of the application.