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## User Management

The screen contains a table displaying all current users. When accessed for the first time, the screen will show only one user, i.e. the admin (Head Office).

Following is a description of each field on the User Management screen:

1. **Full Name**: This is the full name of the user displayed in the format “*First Name, Last Name*”.
2. **Email ID**: This is the email address of the user displayed.
3. **Contact No.:** This is the mobile no. of the user. (\* do we need to support multiple entries for this field\*)
4. **Region:** This is the name of region(s) to which the user has access. The user shall use this name as part of login information in the field **“*Region*”**.
5. **Groups**: This is the list of user group(s) to which the user belongs in the environment.

The screen lists groups for a user at regional level. If a user is part of multiple groups in a region, they are displayed side by side.

### Filtering users

The tool allows admin to filter the users visible on the screen. There are three types of filters supported by the tool.

1. Filter by user name
2. Filter by region
3. Filter by group

**a) Filter by user name**

Users can be filtered by typing in the search box provided beside ‘*Full Name*’ on the screen header. There are few features built into it.

1. This search box is instantaneous and filters users as you type. There is no need to press ‘*Enter*’ or click a button.
2. The search is not case sensitive. Keywords such as ‘*Admin*’, ‘*admin*’ or any other combination of lowercase and uppercase letters return the same results.
3. The search supports partial keywords. For example, if there is a user named ‘*Mubashir*’, keywords such as ‘*Mub*’, ‘*shir*’ or ‘*bashir*’ will return the user in the search results.

**b) Filter by region**

1. If there are more than one regions available, the users can be filtered by pressing region filter button () provided beside ‘*Region*’ on the screen header. Pressing this button opens a drop-down menu listing all the available regions. Users can be filtered by checking / unchecking the box displayed next to the name of each region.

**c) Filter by group**

* Users can be filtered by pressing group filter button () provided beside ‘*Groups*’ on the screen header. Pressing this button opens a drop-menu down listing all the available groups. Users can be filtered by checking / unchecking the box displayed next to the name of each group.

### Adding a user

To add a new user, click on ‘*Add user*’ button at the top/bottom of screen. This opens a dialog box, where the admin has to provide information for the new user:

* **Email:** Email address for the user. The domain name must exist in white listed domains.
* **Confirm Email:** Email address for the user. This must match the address provided in the ‘Email’ field.
* **First Name:** User’s first name
* **Last Name:** User’s last name
* **Region:** The region to which the user needs to be added to. It is provided by FIDEM and must be selected from a drop-down menu.
* **Contact No.**: Mobile no. of the user (do we need to support multiple entries here)

### Saving a user added or changes made to user information

There should be a *‘Save’* button alongside *‘Add User’* button. This button should get enabled only when a new user is added or changes have been made to information related to an existing user.

There should be option available to add/remove a user to/from Regions, assign/remove groups to an existing user.

**NOTE: do we need to send emails to user when they are added in the system?**

### Roles

User interface roles are designed based on the needs of the users and they belong to different functional areas within the clients’ organization. Every user of this software has a certain role in its organization that comes with a fixed set of responsibilities. Every role is a collection of permissions which are associated with different functions / operations on the user interface.

The roles are a combination of a predefined set of privileges. To give a user a particular set of privileges, the admin user just needs to assign the relevant role to that person. The options and functions in the software’s user interface are customized for the users based on their roles. Every user can be assigned to multiple roles and the privileges associated with each role are added up. The details about the roles, their definitions and their associated privileges are described in the following sections of this document.

## Procurement:

* **Procurement Officer:** role assigned to the user who prepares the purchase requisition, obtain quotations, receive goods, receive and check invoice.
* **Procurement Manager:** role assigned to the user who check and authorize the purchase requisition, select supplier (TBD), issue purchase order, prepare and authorize payment voucher, enter payment in cashbook

**For supplier selection, do we need an additional user?**

These users will only be assigned to HeadOffice and none of the region will have these user roles

### Procurement Process Flowchart

Select Supplier

Obtain quotations

Check & Authorize Requisition

Prepare Purchase Requisition

Receive & check invoice

Receive Goods

Issue Purchase Order

A notification should be sent to Inventory Officer and Inventory Manager to enter the procured inventory in the system

Enter Payment in cashbooks

Pay the supplier

Prepare & Authorize payment voucher

## Inventory Management:

* **Inventory Officer (region based):** role assigned to the user who enters the inventory records in the system
* **Inventory Manager (region based):**

**Things to be covered:**

UI page to add inventory

Transfer inventory form and mechanism

Inventory tracking on region based …. Mechanism for low inventory identification

Mechanism for procurement request/ transfer request

Track inventory requested for sample and for sale separately (reconciliation of inventory)

## Sales Management

Things to be covered:

Customer addition screen

Approval process for customer addition

Admin rights for editing information

Sale status tracking

Sale order generation

Delivery challan

Sale invoice

Payment tracking

Customer tracking

**Sale Management:**

* **Sales Officer (region based):**
* **Sales Manager (region based):**

**Permissions:**

To be added according to the UI structure.

## LIST OF SCREENS

1. Login Page
2. Landing Screen
3. Procurement
4. Transaction

## LANDING PAGE

1. Procurement
   1. Add Inventory
      1. Product Name
      2. Vendor
      3. Quantity
   2. Edit / Delete Inventory
   3. View Inventory
   4. Transfer Inventory
2. Product / Vendor Management
   1. Product Management
      1. Add New Product
         1. Vendor
         2. Publisher
         3. Product Name
         4. ISBN
         5. Category
         6. Subject
         7. Price
      2. Edit / Delete Product
      3. View Product
   2. Vendor Management
3. Sales
   1. Customer Management
      1. Add new Customer
         1. Add Prospective Customer
         2. Add Confirmed Customer
         3. Transfer Customer to Confirmed Customer
      2. Edit / Delete Customer
         1. Edit / Delete Prospective
         2. Edit / Delete Final
      3. Check Transfer / Authorization Status
   2. Process Sale
      1. Sample Sale
         1. All customers should be visible
         2. Linked with inventory screen
      2. Final Sale
         1. Only final customers should be available
         2. Sale order generation
         3. Approval for sale
         4. Delivery Challan generation
         5. Sale invoice generation
      3. Pending Orders
         1. Sale rep should see orders which were generated by him
         2. Regional head should be able to see all orders for all sale reps of that region
4. Reports
5. User Management
6. Accounts

PROCESS SALE TRANSACTION

**(This should be like the step by step ticket reservation screen):**

1. Select Customer from a list
2. Customer List of Columns
   1. Region
   2. Customer Name
   3. Branch
   4. Contact Person
3. One product per line with adding more products capability
4. Select Product
5. List of Product columns
   1. Serial Number
   2. Category
      1. Pre Primary
      2. Primary
      3. Secondary
   3. ID
   4. Name
   5. Quantity
   6. Price
   7. Total
6. Discounts
   1. By Type of Customer
   2. Yes or No?
7. After Discount Total
8. Buttons
   1. Save
   2. Cancel
   3. Generate Sale Order
      1. Booking No
      2. Invoice Date
      3. Customer Details
      4. Order Details
      5. Booking Terms
      6. Signatures and Checks
         1. Prepared By
         2. Checked By
         3. Approved By
         4. Receiver’s Signature
      7. Terms and Conditions
   4. Generate Delivery Challan
      1. Challan No
      2. Customer Details
      3. Delivery Date
      4. Yaqeen Branch
      5. Tracking
      6. Transporter
      7. Order Details
      8. Signatures and Checks
         1. Prepared By
         2. Checked By
         3. Approved By
         4. Receiver’s Signature
      9. Terms and Conditions
   5. Generate Sale Invoice
      1. Invoice No
      2. Date
      3. Customer Details
      4. Order Details
      5. Total Amount
      6. Sales tax etc
      7. Payment Method
      8. Terms and Conditions

## THINGS ON ROADMAP – LAST MINUTE CHANGES

* Add Popups on Save Buttons
* Add User field in Product Management
* Inventory – Need to add a field for sample and final

## LIST OF TABLES

### Schools

### Wholesalers

### Bookshops

### Vendors

### Inventory

### Regions

### Agents

### User Roles

### Users

### Permissions

### Cities

### Payment Types

### Publishers

### Customer Type

### Inventory Type (Sample / Actual)

### Transaction Status

### Users

### Types of Books

* 1. Pre-Primary
  2. Primary
  3. Secondary

## Issues with current software

* Data Entry
* Too many errors
* Accounting Errors
* Data duplication
* No backup
* Errors in inventory due to invoice getting corrupted
* Invoice created but inventory not updated

## FIRST Meeting Notes

Sales performance for this season

FIDEM –

Procurement is done by head office. 3 Vendors right now. But everything is given to South right now but eventual goal is to give directly from CENTRAL.

HEADOFFICE

SOUTH – CENTRAL – NORTH

CITIES

VENDOR TYPES (Different discount types for each vendor)

Schools

Booksellers

Wholesalers

CUSTOMER ENTRY CHECK should be done at Head office through approvals.

Example of agent – Buys at 30% saying X person is wholesaler but then sells it further for 25%.

Ability to change cities within regions should be with Head office.

Store Keeper –

Status highlight with alert generation of each status

Balance order of each transaction

Two years data for conversion

Procurement

Procurment transfer at the end of the year

Initially everything gets booked to Yakeen but at the end of the year this will get transferred to 1,2,3 etc.

Types of Books

Headoffice should have option to edit any order for eg changing discount percentage for certain invoices.

Reporting granularity is important.

System should be completely linked within.

Regional Heads should see his own dashboard

All costs , expenses and sales should be attributable to regions

Rights management is important for all users and screens

Performance should be issue.