***Web URL***

[***http://customer.argusdistribution.co.uk***](http://customer.argusdistribution.co.uk)

***Login: TestCustomer***

***Pass: test***

***Specification for Argus Distribution Limited – Customer Portal***

*The purpose of the portal is to create a central ordering point for each of our customers.*

**Login**

The system should provide a clear, easy to use login system that is secure.

This must also include a forgotten password system.

**Home Screen**

Following the login, the customer should be presented with a screen detailing the activity on their customer account.

This includes the following items:

1. **Current Orders**
   1. A list of all current orders that have not been invoiced to the customer.
   2. Includes the PO (Purchase Order) number, Date of Order and Order Status
      1. The order status could be Ordered, Received or Shipped.
2. **Outstanding Invoices**
   1. When each Current Order has been invoiced, the system will move the order over.
   2. This will list each invoice with Invoice Number, Due Date and Status.
      1. Status could be Invoiced or Overdue
      2. If the invoice becomes overdue, the ability to order needs to be stopped for this customer. The system will tell the user that they are on STOP and they will be emailed every day to remind them until they pay the overdue amount.
3. **Completed Orders**
   1. This will list all the invoices/previous orders that have been completed and paid.
4. **Account Balance**
   1. This should show the current account balance (in £ Pounds Sterling) that the customer has.
   2. The account balance is the TOTAL amount due from Current Orders/Outstanding Invoices.
   3. If any of this amount is overdue, then it should appear in RED and detail a list of overdue invoices below it.

**Menu**

1. Orders
   1. New Order
   2. New Quotation
   3. Current Orders
      1. A list of the current orders. Same as the home screen but extended to display all of them.
   4. Completed Orders
      1. A list of the completed orders. Same as the home screen but extended to display all of them.
2. Invoices
   1. Outstanding Invoices
      1. A list of the outstanding invoices. Same as the home screen but extended to display all of them.
   2. Payment Options
      1. A list of payment options provided by Argus Distribution.
      2. ***A future feature will include credit card payments through this page.***
3. Returns
   1. This page will be a form for customers to return products to Argus Distribution for returns analysis.
   2. The following details should be collected on the form:
      1. RMA Number
      2. Customer’s representative
      3. Credit Required? Y or N
      4. Repair Required? Y or N
      5. Invoice number to credit against
      6. Report Required? Y or N
      7. Site Address
      8. Details of Installation
      9. List of products being returned and their individual date codes
      10. Description of fault and environmental conditions
      11. Date of Installation
      12. Date of last maintenance
      13. Any additional information
4. Technical
   1. A forum for all of the customers to interact and talk to each other about problems they may have had with the system.
   2. Technical Database
      1. Datasheets/Manuals and product details etc.
5. Settings
   1. Password Change
   2. Change contact details/address etc.

**New Order**

1. Collect the following information during ordering
   1. Purchase Order Number (PO Number)
   2. Date (Current Date) – Also record the timestamp of the order for admin reference
   3. Invoice Address (Automatically the company’s address but can be changed)
   4. Delivery Address (Automatically the company’s address but can be changed)
   5. Quantity
   6. Product Code
   7. ADL Code
   8. Product Description
   9. Rate
   10. Total Amount
   11. VAT Code
   12. Sub-Total
   13. VAT Total
   14. TOTAL
2. The order should then be sent to Argus Distribution by email and displayed on the admin panel
3. The customer should also be able to attach a copy of their Purchase Order form in PDF format. This should be stored in our database.
4. All orders under £500 (including VAT), should have a carriage charge added. This is variable but is currently £7.00. The admin should be able to change this.

**New Quotation**

The same as New Order, but the sheet should be able to be printed in easy read format. This should NOT be sent over to Argus Distribution as it is not an order.

**Customers**

Each customer will have their account added by a member of Argus Distribution staff. Customers are NOT allowed to register on their own.

They should be sent an activation link by email with a link to their account.

Each customer has a different price list.

There is also a default price list, which can be edited to suit each customer.

**Admin**

There should be the ability to have admin accounts, which can monitor the overall situation for ALL customers.

They should be able to see when users have logged in, monitor orders etc. and edit all orders/invoices.

The admin accounts also need to be able to change the status of each order.

When the status is changed to invoiced, the admin will confirm the total costings and also upload a PDF copy of the actual invoice.

The customer needs to be emailed when the status of each invoice is changed.