**This document defines the project. Below are the short descriptions that I have understood from your document along questions. Please validate them and answer the questions. I am not discussing fields (name, id, phone number) of specific role like customer, quotations in this document. I am currently interested in getting the understanding of project. Fields will be discussed in design phase.**

You are dealing in fire extinguisher equipments. You want do design software to made whole process computerized.

We are a UK/Ireland distributor of fire detection equipment. Smoke Detectors, Alarms etc.

**Front/Customer End:**

What will be displayed on home page? You said activity. What different transactions and statuses you want to be displayed there? Please explain all in details.

Like you see on our current portal, we have the latest 5 transactions for current orders, invoices and outstanding invoices as well as the customer’s current account balance.

**Customer Login**

1. Registered Customer can login with secure username/password.
2. They have option to change their account specific details that will be discussed in design phase.
3. They have option to change password and retrieve password.
4. They can send you private message to admin(s) using portal. This feature is integrated to your portal.
5. They have option to send admin an email message. Portal only provides the facility to email. It can’t receive email from outside.

(Requirement 4 and Requirement 5 do not exist but these are there in new systems. Please confirm that you want it to be in your system or not.)

These would be useful additions to the new portal. We would like these added.

**Order/Quotation**

1. Customer has option to ask for quotation. (Quotations are similar to orders, right? What Admin will do when quotation is submitted by the customer? I think Admin will just quote the prices and submit the form with additional information.) Quotations enable the customer to price a job before actually making the order. Therefore the sheet needs to be the same as when they order except for a PRINT option instead of making the order. They can then print off the quotation sheet for their use.
2. Customer can submit order.
3. Customer can edit previous orders/quotation until it is accepted by the admin.
4. Customer can see status of the orders. What could be the different statuses of the order? The order can be of the following status: 1. Ordered 2. Accepted 3. Shipped
5. 4. Invoiced 5. Outstanding (If they have not paid) 6. Completed

You said quotation and order is same except purchase order form. First to my understanding there is no need of purchase order form. Reason is you can collect all information on portal. Information includes the products and quantities. Please explain in detail why customer has to attach the purchase order form and why PDF? To my understanding purchase order form should not be submitted using a form is filled which contains all required items.

The purchase order form is an optional attachment for the customer. It ensures that all the correct paperwork is sent just in case. They do not have to send it, but it is an option if they wish. It doesn’t have to be PDF but also could be a scanned image as you say.

If purchase order form is required from customer then why it should be PDF ? Why don’t some image as a result of scanning ?

You have provided me the details of account in which I can’t observe anything. So please explain in details the following things.

What admin can do with the orders submitted? Explain in detail.

Change the order status. Accept the order, mark the order as shipped, edit the order, invoice the customer etc.

What admin can do with the quotations submitted? Explain in detail.

Nothing. These are for customer use only.

What customer can do when order is submitted? Explain in detail.

Track the progress of their order and then collect their invoices when they are ready etc.

All fields are simple. No issue.

**Invoices**

Here you have not mentioned the thing that how order is changed to invoice? Please explain. Upon which criteria an order is changed to invoice.

When the item has been received by the customer, the admin will go on to the portal and upload the invoice for the customer. The invoice is a PDF created by our accounting system.

What are the different status of invoices? Yes, you have written Outstanding. But what other could be?

As mentioned above:

1. The order can be of the following status: 1. Ordered 2. Accepted 3. Shipped
2. 4. Invoiced 5. Outstanding (If they have not paid) 6. Completed

Invoices are electronic. Right? Means they are created by admin using software and can be printed and stored.

Correct, the invoices are PDF created by our accounting system.

You have written that there could be different options for payment. What are different options currently? Also in future you are asking about online credit card payment. Which payment gateways you would be using most probably?

Currently most customers pay by Cheque or Bank Transfer. When these payments are received, the admin can login to the portal and add the payment. The payment gateway that we use is Barclaycard ePDQ. We also have a small CubeCart store although this is not yet operational.

To my understanding Purchase orders, Quotations and invoices are all electronic. Means customer and admin fill the form and it is stored in the database. All invoices and purchase orders can be converted to PDF for print and record. Am I right?

Correct. Although the portal will NOT need to covert anything to PDF for printing. The PDF files will be attachments uploaded by either the customer or the admin.

What could admin can do with invoice backend? First he creates the invoice and submit it to customer. What other options you want on backend with invoice?

Simply invoice the customer. I don’t think there are any other functions for this at the moment.

What client has options to do with invoices when invoice is submitted from admin?

Download the invoice and confirm the receipt of it. The admin will then be alerted that the customer has received their invoice.

**Returns**

Please explain the return process that Argus Distribution adopts.

You have mentioned that “This page will be a form for customers to return products to Argus Distribution for returns analysis”. Please explain the phrase “return analysis”. What analysis you made? What further software will help you to made returns? All these returns should be made in record.

We make technical analysis of any returned products. If the portal could contain a record of all returns and comments by the admin about the analysis then that would be very useful.

Please explain all these fields in detail. Some are obvious but most of them are not understandable for me.

* 1. The following details should be collected on the form:
     1. RMA Number Returns Number provided by the admin
     2. Customer’s representative The name of the technical person for the customer
     3. Credit Required? Y or N If the items are returned for credit. (The customer gets the money back).
     4. Repair Required? Y or N Is repair required?
     5. Invoice number to credit against If the customer wants the credit then what invoice should it be made against.
     6. Report Required? Y or N Does the customer need a report of the analysis?
     7. Site Address Where were the products installed? What address?
     8. Details of Installation What type of building were the products installed?
     9. List of products being returned and their individual date codes What items are being returned? Including their individual date codes.
     10. Description of fault and environmental conditions
     11. Date of Installation
     12. Date of last maintenance
     13. Any additional information Final comment box for any other information

Once this form is submitted what admin will do on back end?

Authorize the customer to return the items.

What client can do after submission of this form?

Return the items to Argus Distribution.

**Technical**

Forum

You have asked for a forum where customers can discuss issues about the products and system.

Which things you want in forum? Can customer add video, file or audio? Or it will be a simple forum?

Simple forum, PHPBB might be a good solution.

What is technical in this forum that you have named it technical?

Technical details are discussed by the customers. All of the customers can discuss these things together.

Manuals/Datasheets

Here you want to upload the manuals/datasheets of your products.

Correct.

Other optional additional features

1. You have not mentioned the inventory system. Inventory system can be placed there which is linked with orders. Orders are only made for those items which are available in inventory and inventory is automatically reduced on acceptance of order. Inventory is dealt with by our accounting system. This should not be dealt with on the portal.
2. If you offer credit/ installment options you can deal that also using software. Explain the process you adopt manually. I will try to find some solution for that on software. Each customer has a different credit term of say between 30-45 days. If they have not paid within that time then the portal should alert them and stop them from ordering any more items. This should also apply for a credit limit for each customer which might be £5000 for example.
3. You can add website of your company. www.argusdistribution.co.uk

**Back/Admin End:**

All above plus additional things will be controlled by back end.

Admin can add further sub-admin persons for different roles. Like answer the quires of customers or give rates to clients for their quotations. Excellent. What could be the all different possible roles? Super-Admin. Can do everything. Accounts. Can do the invoicing. Also speak to customers by message. Delivery. Can only accept the order and mark it as shipped. Also explain their rights in details. By roles mean that not every person added may be allowed to change the status of invoice. He can only answer the quires of customer. This is his right.

Admin can add/edit/remove/view customers. Also they access on completely their accounts.

Perfect.

Admin can add complete products along their prices. This will be the default list. It could be changed for every customer. Perfect.

Admin has right to do all possible actions with invoices and orders. Perfect.

Admin have full right to upload manuals and datasheets of the products. Perfect.

Super admin can view the activity of customers and other admin persons. Perfect.

**General**

Every person is informed by email, if any activity is performed related to his concern. For this we need services of a designer to design a template of email. It is like $30-$50 maximum. But we need it.

This is fine. Please go ahead with this.

What other general features you want to insert in this software?

I will think about this, for now I think we have covered all the features.

Please provide me the backend link along username/password. I want to review that. If it is live even then, I will not do any changes. I just want to review the system.

Username: waqas

Password: waqas

This is currently LIVE so please do not make any changes. It is for reviewing the current system.

Please let me know if you need any more information.