|  |  |
| --- | --- |
| **Ticket ID** | TT6476 |
| **Ticket description** | Point from Siddharth sir, shared by Gaurav sir. Cx orders processed in Padm are manually entered in connect us -> cx order portal. But, not all orders are added in connect us. 1) firstly, identify the options which all orders are not added from Padm. 2) Send notification to salesperson regarding order which is not added by him/her in connect-us from Padm. 3) Sales & sales incentive shouldn't be displayed to salesperson in my cs app for such instances. 4) Notification should be sent to manager about order which is not added by particular salesperson. |
| **Created by** | Manali Bhadirage |
| **Created on** | 10/12/2022 |
| **Priority**  | medium |
| **Version**  | 1.0 |

**Version**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Sr. No** | **Version no** | **Version Date** | **User name** | **User department** |
| **1** | **1.0** | **10/12/2022** | **Siddharth Shah** |  |
| **2** | **1.1** | **07/06/2023** | **Gaurav shaha** |  |
|  |  |  |  |  |

**Approvals**

|  |  |  |
| --- | --- | --- |
| **Field** | **Name of the User** | **Approved date by the user** |
| **Actual User Name** |  |  |
| **Actual User Department** |  |  |
| **Organization Name** | CSJewellers |  |
| **Assigned BA** | Manali Bhadirage |  |
| **Assigned Developer** | Punam shinde |  |
| **Assigned Tester** | Priyanka dupargude |  |

**Estimation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Department name** | **Estimated Time (In hr)** | **Scheduled Date (Starting date )** | **Estimated date** | **Actual delivery date** |
| **BA** |  |  |  |  |
| **Development** |  |  |  |  |
| **Testing** |  |  |  |  |
|  |  |  |  |  |

**Introduction**

Whenever customer visits a branch and purchases an jewellery item, salesperson first prepares order note of the purchase and then salesperson enter the purchase related details in Padm -> customer order. Further, salesperson enters the customer orders in Connect Us -> Customer order module.

**Business requirement**

Client requires an system through which they can analyze the customer orders which are entered in Padm by salesperson but ain’t entered in Connect Us yet.

**Existing system**

There is no such existing system.

**Proposed system**

Step 1.

Through system (Cron), Padm -> customer orders and Connect Us -> Customer orders -> Order Detail should be synchronized. Orders will be analyzed using date and order number / doc series number. Report of orders which are not entered in Connect Us -> customer orders will be generated. It will have following fields:

* Date
* Order No. Or Doc & Series No.
* Employee ID
* Employee Name
* Customer Name
* Branch Name

Step 2.

Notification will be sent to the branch managers on the next day in MY CS app regarding the orders which are not entered in CU by their reporting sales person. It will consists following details- Employee ID, Employee Name, Customer Order No. And Customer Name.

Step 3.

At the same time, pop-up and notification will be sent to the salesperson on the next day regarding the orders he/she hasn’t entered in CU. Also, if any salesperson hasn’t entered any order in the CU, then sales incentive will not be displayed to that employee.

After receiving notification, salesperson can enter his pending orders in CU.

If salesperson enters the pending orders later, then sales incentive will be displayed to him / her.

Step 4.

(All orders are not entered in connect us compulsorily or also due to business reasons there is a delay in the process to enter the orders in CU.) In such cases, through connect us, branch managers will analyze the orders and approve / reject the cases and mention the reason. For that, we have to create one menu ‘Customer order request’ through which sales person can send request to his branch manager. We have to display all orders which are not entered in connect us -> order detail by that particular employee. It will have following fields:

* Export button
* Date
* Order No. Or Doc & Series No.
* Employee ID
* Employee Name
* Customer Name
* Branch Name
* Reason (mandatory)
* Send request (also provide Bulk action to send request)

Once salesperson enters reason and clicks on submit request, it will be sent to branch manager.

Received requests will be displayed to branch manager on menu ‘Customer order request’ in first come first served basis. It will have following fields:

* Date
* Order No. Or Doc & Series No.
* Employee ID
* Employee Name
* Customer Name
* Branch Name
* Reason (mandatory)
* Action - approve or request (also provide bulk action to approve or reject)

Once request for any particular order is rejected / approved, then its status will be displayed to salesperson. Approved or rejected request should be displayed at bottom I.e. below list of received request. If request is approved, then salesperson need not enter order in connect us and hence salesperson will be able to view sales incentive in my cs application. If request is rejected, then salesperson will necessarily have to enter document in connect us -> order detail.

(We need to create reason master in back-end for this. Reason master will have following fields:

Reason Name

Remark

Is Active

Alternatively, use remark master of daily stock but in customer order module, it should display remarks related to customer order only)

If branch manager approves the case that particular order doesn’t need to be entered in CU, then only sales incentive will be displayed to that particular salesperson provided the condition that there is nor pending orders in that salesperson’s login. If branch manager rejects the case, then employee will compulsorily have to enter the order in CU.

Approve / reject action will be performed by branch manager through back-end I.e connect us.

Step 5.

If any order is kept pending by salesperson for consecutive three calendar days, then auto-generated email should be sent to branch manager and cluster manager.

Step 6.

If customer orders are not entered by salesperson, then all fields named as actual and achievement in connect us -> sales incentive shouldn’t be displayed to salesperson as well as his reporting branch manager. In connect us sales incentive, it should display message to branch manager and respective salesperson that ‘Few customers orders are not entered by you / your salesperson and hence data is not displayed’ .

**References of the users**

|  |  |  |  |
| --- | --- | --- | --- |
| **User** | **Name** | **Mail** | **Contact number** |
| **Actual user** | Gaurav shaha | Gaurav.shaha@techneai.com |  |
| **Ticket created by (if any)** | Manali bhadirage | Manali.bhadirage@techneai.com | 2964 |
| **Assigned business analyst** | Manali Bhadirage | Manali.bhadirage@techneai.com | 2965 |
| **Assigned developer** | Punam shinde | Punam.shinde@techneai.com |  |
| **Assigned tester**  | Priyanka dupragude | Priyank.dupargude@techneai.com | 2965 |