REQUIREMENT DOCUMENT

Building 8-2-293-82/A, Plot 1107, Road Number 55, opposite Peddamma Talli Temple, CBI Colony, Jubilee Hills, Hyderabad, Telangana 500033

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Revision History

Name	Date	Reason For Changes	Version

Building 8-2-293-82/A, Plot 1107, Road Number 55,
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2 Sales & Distribution

The **Procurement Module** in the Jewellery ERP system is designed to streamline and manage the purchasing process, ensuring efficient procurement of raw materials, gemstones, metals, and finished goods. It facilitates vendor management, purchase order creation, supplier negotiations, and order tracking. This module helps businesses optimize procurement costs, maintain stock levels, and ensure a smooth supply chain by integrating with inventory and financial systems. It also enables real-time monitoring of purchase transactions, reducing delays and discrepancies while enhancing overall procurement efficiency.

2.1 Template Master

Template Master is a centralized module designed to manage predefined templates for various jewellery-related operations. It enables users to create, store, and customize standard templates for documents, reports, product configurations, pricing structures, and other key processes. By streamlining template management, this module ensures consistency, efficiency, and accuracy across different jewellery workflows.

2.1.1 Data View

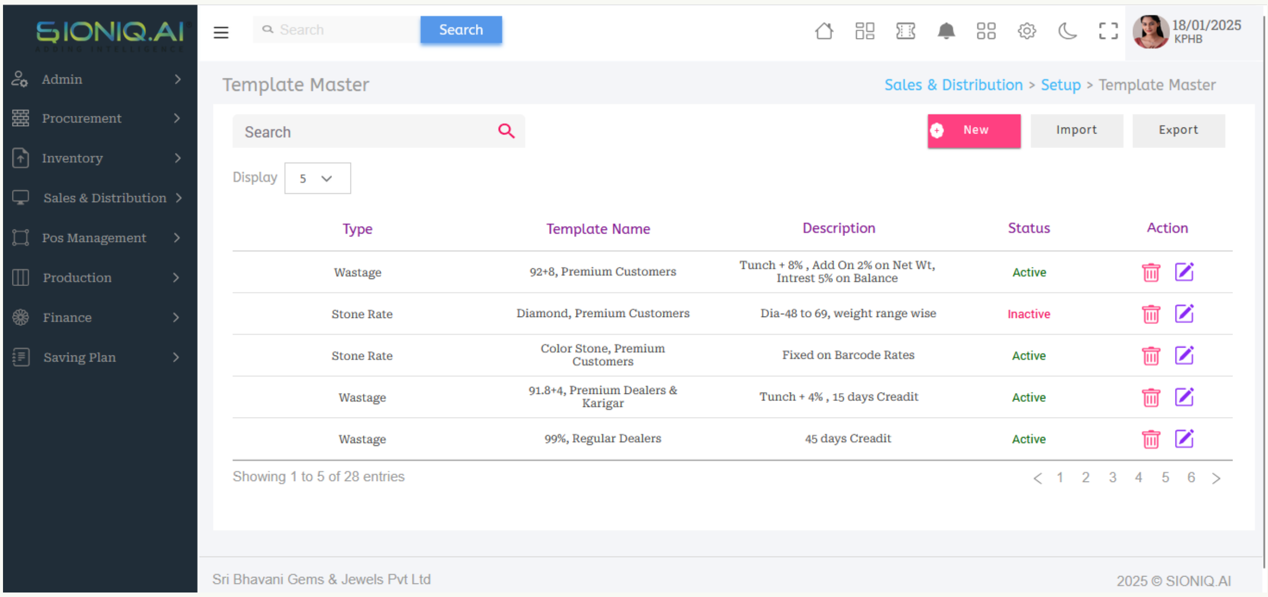
2.1.1.1 Purpose

Template Master provides a structured interface to manage and access predefined templates efficiently. It allows users to search, filter, and organize templates based on categories, types, and statuses. This ensures quick retrieval, consistency, and seamless utilization across jewellery operations.

2.1.1.2 User Type

Registered Users, Admins.

2.1.1.3 Screen Layout



2.1.1.4 UI Elements

- **Search Option**
  - **Description**: A search bar located at the top of the data view section to filter the Template Master records displayed in the table.
  - **Functionality**:
    - Enabled users to search by Type, Template Name, Description, Status, Action.
    - Dynamically updates the displayed table to show only results that match the search query.
- **Display Dropdown**
  - **Description**: A dropdown control to set the number of rows shown in the table at once.
  - **Options**: Common choices (e.g., 5, 10, 25, 50, 100 rows per page).
  - **Functionality**:
    - Allows users to control the number of Template Master records displayed per page.
    - Updates the table view immediately based on the selected number of rows.
- **Buttons**
  - **New Button**
    - **Label**: "New"
    - **Functionality**: Opens the Template Master form to add a New Template Master record.
  - **Export Button**
    - **Label**: "Export" (or Icon button as specified)
    - **Functionality**: Allows users to export the displayed Template master data in various file formats (Excel).
    - **Export Options**:
      - Exports all or filtered data based on the current table view and search filter.

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- **Import Button**
  - **Label**: "Import" (or Icon button as specified)
  - **Functionality**: Redirects to the Import Form page, where users can upload Template Master data.

- **Tabular View**
  - **Description**: The Tabular View provides a comprehensive and structured representation of all Template Master details registered in the system. It enables users to view, manage, and perform actions on Template data efficiently.
  - **Columns**:
    - **Type**: Displays the Type (e.g. Wastage, Stone Rate).
    - **Template Name**: Displays the Template Name (e.g. Premium Customers, Regular Customers, Premium Dealers, Regular Dealers).
    - **Description**: Displays the Description (e.g. Interest on Balance, Weight Range Wise, 15 days Credit, 45 Days Credit).
  - **Status**:
    - **Status Values**:
    - **Active**: If the checkbox is checked in the form.
    - **Inactive**: If the checkbox is unchecked in the form.
  - **Action**:
    - **Delete**: Deletes the selected Template master record (permission-based).
    - Functionality: Triggers a delete confirmation prompt before proceeding.
    - **Edit**: Allows modification of the Template master information (permission-based).
    - Functionality: Opens the Template Master form populated with the selected Template master data for editing.

- **Paging for Table View**
  - **Description**: Includes pagination controls at the bottom of the table for navigating through multiple pages of Template master records.
  - **Functionality**:
    - Displays navigation buttons (e.g., "Previous", "Next") to move between pages.
    - Shows page numbers to allow users to jump directly to specific pages.
    - Updates the displayed Template master records based on the selected page.

2.1.1.5 Functional Requirements

None.

2.1.1.6 Data Requirements

- **Data Source**

- The data displayed in the Template Master Table View is sourced from the Template Master Table.
- **Fields and Requirements**:
  - **Type**: Displays Type like "Wastage" "Stone Rate".
  - **Template Name:** Displays Template Name like "Premium Customers", "Regular Customers", "Premium Customers".
  - **Description:** Displays Description Like "Interest on Balance", "15 days Credit", "45 Days Credit".
- **Status**: Displays the current status of the Template (e.g., Active or Inactive).
- **Action**: Provides options to **Edit** or **Delete** the respective Template record.

○ **Usage**

The table data is used for operational decisions, navigation, and reporting. All fields are searchable and filterable based on the requirements.

2.1.1.7 Non-Functional Requirements

None.

2.1.1.8 Configurations

○ **Functionality:**

- **Permission Settings**: Restricts the visibility and accessibility of buttons and actions based on user roles or permissions, applicable only to **Admins and Registered users**.

○ **Available Permissions:**

- **New Template Permission**: Grants authorized users access to the "New" button for creating new template master records.
- **Edit Permission**: Enables authorized users to access the **Edit** button in the **Action** column, allowing modification of existing template master records.
- **Delete Permission**: Provides authorized users access to the **Delete** button in the **Action** column, enabling deletion of template master records.

○ **Permission Assignment:**

- Permissions are assigned exclusively to Admins and Registered users, ensuring role-based control over data management and system operations.

2.1.1.9 Flowchart

None.

2.1.1.10 Additional Notes

None.

2.1.2 Create Wastage Template

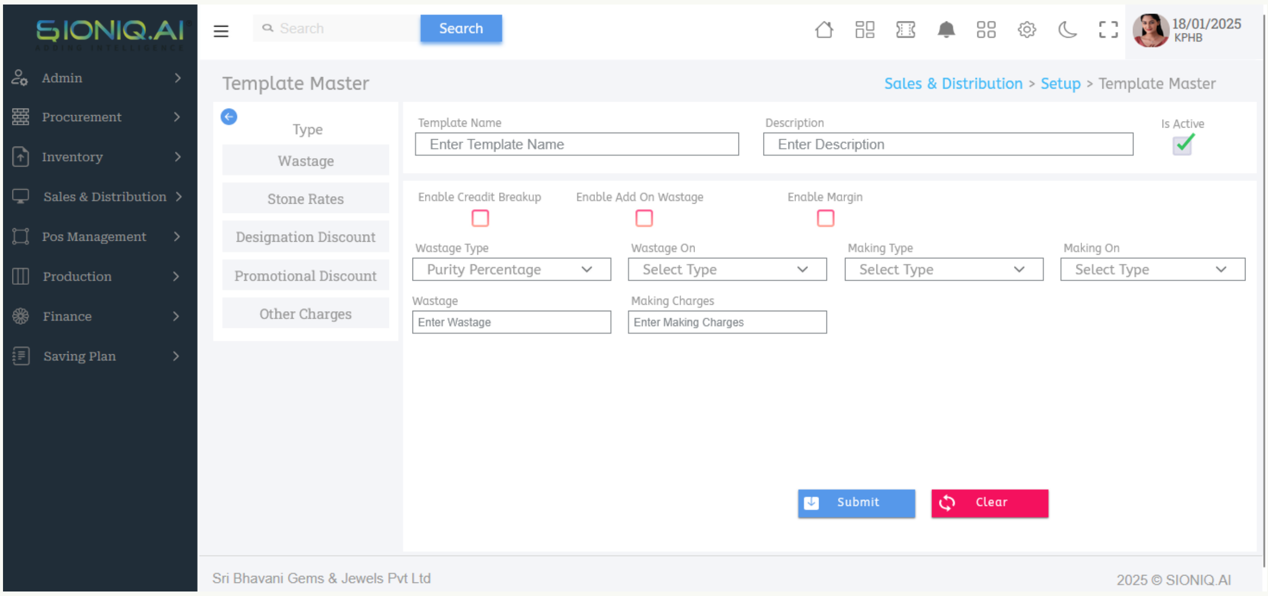
2.1.2.1 Purpose

The Create Template Master module is designed to streamline the creation of standardized templates for various jewellery-related processes. It enables users to define, store, and manage templates for documents, pricing structures, product specifications, and reports. This ensures consistency, accuracy, and efficiency across operations, reducing manual efforts and enhancing workflow automation.

2.1.2.2 User Type

Registered Users, Admins.

2.1.2.3 Screen Layout



2.1.2.4 UI Elements

- **Template Name**
    - **Type:** Text Input
    - **Label:** Template
    - **Editable:** Yes
    - **Description:** Enter the Template for the template record.
    - **Validation:**
        - **Required:** Yes

- **Character Limit:** 50 characters
- **Allowed Characters:** Letters, spaces, Numbers, and special characters.

- **Description**
  - **Type:** Text Input
  - **Label:** Description
  - **Editable:** Yes
  - **Description:** Enter the Description for the template record.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 50 characters
    - **Allowed Characters:** Letters, spaces, Numbers, and special characters.

- **Is Active**
  - **Type:** Checkbox
  - **Label:** Is Active
  - **Editable:** Yes
  - **Description:** Check this box to mark the template record as active.
  - **Validation:** Required field

- **Enable Credit Breakup**
  - **Type:** Checkbox
  - **Label:** Enable Credit Breakup
  - **Editable:** Yes
  - **Description:** Check this box to enable credit breakup for this template.
  - **Validation:** Optional field

- **Enable Add on Wastage**
  - **Type:** Checkbox

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- **Label:** Enable Add on Wastage
- **Editable:** Yes
- **Description:** Check this box to enable additional wastage for this template.
- **Validation:** Optional field

- **Enable Margin**
  - **Type:** Checkbox
  - **Label:** Enable Margin
  - **Editable:** Yes
  - **Description:** Check this box to enable margin for this template.
  - **Validation:** Required field

- **Wastage Type**
  - **Type:** Dropdown
  - **Label:** Wastage Type
  - **Editable:** Yes
  - **Description:** Select the wastage type for the template.
  - **Options:**
    - Purity Percentage
    - Tunch
    - Wastage
    - Direct Wastage
  - **Behavior:**
    - **Purity Percentage:** Wastage is calculated based on the purity percentage of the metal.
    - **Tunch:** Wastage is determined by the tunch value, a measurement of gold purity.
    - **Wastage:** Direct wastage is applied as per predefined values.
    - **Direct Wastage:** A fixed wastage weight is applied directly.

- **Wastage On**
  - **Type:** Dropdown
  - **Label:** Wastage On

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- **Editable:** Yes
- **Description:** Select how wastage is calculated for the template.
- **Options:**
  - Gross Weight
  - Net Weight
  - Calculated
- **Behavior:**
  - **Gross Weight:** Wastage is calculated on the total weight of the item.
  - **Net Weight:** Wastage is calculated based on the net weight (excluding additional elements like stones).
  - **Calculated:** Wastage is dynamically calculated based on additional parameters.

- **Making Type**
  - **Type:** Dropdown
  - **Label:** Making Type
  - **Editable:** Yes
  - **Description:** Select the making type for the template.
  - **Options:**
    - Per Gram
    - Per Unit
    - Direct
  - **Behavior:**
    - **Per Gram:** Making charges are applied based on weight per gram.
    - **Per Unit:** Making charges are applied per item (fixed cost per piece).
    - **Direct:** Making charges are predefined and directly applied.

- **Making On**
  - **Type:** Dropdown
  - **Label:** Making On
  - **Editable:** Yes
  - **Description:** Select how making charges are applied for the template.
  - **Options:**
    - Gross Weight
    - Net Weight
    - Wastage + Gross Weight
    - Wastage + Net Weight
    - Wastage
    - Calculated
  - **Behavior:**

- **Gross Weight:** Making charges are applied to the total weight.
- **Net Weight:** Making charges are applied to the weight excluding additional elements.
- **Wastage + Gross Weight:** Making charges are applied based on both wastage and total weight.
- **Wastage + Net Weight:** Making charges are calculated on wastage plus net weight.
- **Wastage:** Making charges are applied only to wastage weight.
- **Calculated:** Making charges are derived dynamically based on multiple parameters.

- **Wastage**
  - **Type:** Text Input
  - **Label:** Wastage
  - **Editable:** Yes
  - **Description:** Enter the wastage value for the template.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 10 characters
    - **Allowed Characters:** Numeric values only.

- **Making Charges**
  - **Type:** Text Input
  - **Label:** Making Charges
  - **Editable:** Yes
  - **Description:** Enter the making charges for the template.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 10 characters
    - **Allowed Characters:** Numeric values only.

Fields Displayed When "Enable Credit Breakup" is Checked

- **From Day**
  - **Type:** Text Input
  - **Label:** From Day
  - **Editable:** Yes
  - **Description:** Enter the starting day for the credit breakup period.
  - **Validation:**
    - **Required:** Yes

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- **Character Limit:** 05 characters
- **Allowed Characters:** Numeric values only.

- **To Day**
  - **Type:** Text Input
  - **Label:** To Day
  - **Editable:** Yes
  - **Description:** Enter the ending day for the credit breakup period.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 05 characters
    - **Allowed Characters:** Numeric values only.
- **Credit Name**
  - **Type:** Text Input
  - **Label:** Credit Name
  - **Editable:** Yes
  - **Description:** Enter the credit name for the template.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 20 characters
    - **Allowed Characters:** Numeric, Letters, Space, and Special characters.
- **Enable Interest**
  - **Type:** Checkbox
  - **Label:** Enable Interest
  - **Editable:** Yes
  - **Description:** Check this box to enable interest for this template.
  - **Validation:** Optional field
- **Enable Margin**
  - **Type:** Checkbox
  - **Label:** Enable Margin
  - **Editable:** Yes
  - **Description:** Check this box to enable margin for this template.
  - **Validation:** Optional field

- **Enable Add on Wastage**
  - **Type:** Checkbox
  - **Label:** Enable Add on Wastage
  - **Editable:** Yes
  - **Description:** Check this box to enable additional wastage for this template.
  - **Validation:** Optional field

Fields Displayed When "Enable Interest" is Checked

- **Interest %**
  - **Type:** Text Input
  - **Label:** Interest %
  - **Editable:** Yes
  - **Description:** Enter the interest percentage for the template.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 06 characters
    - **Allowed Characters:** Numeric values only.
- **Interest On**
  - **Type:** Dropdown
  - **Label:** Interest On
  - **Editable:** Yes
  - **Description:** Select the method for calculating interest.
  - **Options:**
    - Voucher Balance
    - Voucher Pure Weight
    - Voucher Wastage
    - Voucher Gross Weight
    - Voucher Net Weight
    - Bill Amount
  - **Behavior:**
    - **Voucher Balance**
      - Interest is calculated on the remaining balance of the voucher.
      - If the balance is zero, no interest is applied.
    - **Voucher Pure Weight**
      - Interest is calculated based on the **pure weight** of the metal in the voucher.
      - Pure weight = (Net weight × Purity percentage).
      - Used when interest is determined by the actual precious metal content.

- **Voucher Wastage**
    - Interest is applied to the **wastage value** recorded in the voucher.
    - Typically used when wastage is an essential cost factor in pricing.
- **Voucher Gross Weight**
    - Interest is calculated on the **total gross weight** of the item.
    - Includes stones, beads, and other elements along with the metal.
- **Voucher Net Weight**
    - Interest is applied only on the **net metal weight** (excluding stones and non-metal parts).
    - Commonly used for transactions based on the actual weight of the metal.
- **Bill Amount**
    - Interest is calculated on the **total invoice/bill amount**.
    - Includes all charges such as metal cost, wastage, making charges, and taxes.
    - Used when interest is applied at the financial level rather than weight-based.

Fields Displayed When "Enable Margin" is Checked

- **Margin on Wastage**
    - **Type:** Text Input
    - **Label:** Margin on Wastage
    - **Editable:** Yes
    - **Description:** Enter the margin percentage for wastage.
    - **Validation:**
        - **Required:** Optional
        - **Character Limit:** 10 characters
        - **Allowed Characters:** Numeric values only.
- **Margin on Making**
    - **Type:** Text Input
    - **Label:** Margin on Making
    - **Editable:** Yes
    - **Description:** Enter the margin percentage for making charges.
    - **Validation:**
        - **Required:** Yes
        - **Character Limit:** 20 characters
        - **Allowed Characters:** Numeric values only.

Fields Displayed When "Enable Add on Wastage" is Checked

- **Add On Wastage %**
  - **Type:** Text Input
  - **Label:** Add On Wastage %
  - **Editable:** Yes
  - **Description:** Enter the additional wastage percentage.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 20 characters
    - **Allowed Characters:** Numeric values only.
- **Add On Wastage On**
  - **Type:** Dropdown
  - **Label:** Add On Wastage On
  - **Editable:** Yes
  - **Description:** Select how the additional wastage is applied.
  - **Options:**
    - Select Type
    - Gross Weight
    - Net Weight
    - Wastage + Gross Weight
    - Wastage + Net Weight
    - Wastage
    - Calculated
  - **Behavior:**
    - **Gross Weight:** Making charges are applied to the total weight.
    - **Net Weight:** Making charges are applied to the weight excluding additional elements.
    - **Wastage + Gross Weight:** Making charges are applied based on both wastage and total weight.
    - **Wastage + Net Weight:** Making charges are calculated on wastage plus net weight.
    - **Wastage:** Making charges are applied only to wastage weight.
    - **Calculated:** Making charges are derived dynamically based on multiple parameters.
- **Actions Buttons:**
  - **Back (Button):**
    - **Type:** Button
    - **Label:** Back
    - **Action:** Navigate back to the previous screen.

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- **Submit (Button):**
  - **Type:** Button
  - **Label:** Submit
  - **Action:** Save the template record to the system.
- **Clear (Button):**
  - **Type:** Button
  - **Label:** Clear
  - **Action:** Reset all fields in the form to their default state.

2.1.2.5 Functional Requirements

- **Actions**
  - **Submit Button Click**
    - **Action**: The form submission is triggered when the user clicks the Submit button, provided all required fields (Type, Template name and Description) for template master are populated with valid values.
    - **Outcome**:
      - **Create Operation**: If it is a new entry, the system saves the new template master to the database.
      - **Update Operation**: If editing an existing entry, the system updates the existing template master record in the database.

- **Mandatory Fields**
  - **Fields**: Type, Template Name, Description, Status, Action are mandatory fields that must be completed.
  - **Behaviour**:
    - Users are required to enter valid values for each of the mandatory fields.
    - If any mandatory field is left blank, the form submission will be blocked, and an error message will be displayed indicating the missing fields.
  - **Conditional Validation**
    - **Field Format Validation**
      - **Type**: The field must contain a Type.
      - **Template Name**: The field must contain a Template Name.
      - **Description**: The field must contain a Description.
      - **Status**: This field accepts only numeric values.
      - **Action**: This field accepts only numeric values.

- **Error Messages**
  - **Submit Attempt with Missing Values**
    - **Condition**: This condition occurs if one or more required fields are left empty when the user clicks the Submit button.

- **Behaviour**: The system will display specific error messages indicating which fields are missing values.
- **Message Examples**:
  - "Template Name is required" if the Location field is empty.
  - "Description is required" if the Group Category field is empty.

- **Behaviour**
  - **Successful Submission**
    - If all required fields are correctly filled in, the form data will be saved to the database, and a confirmation message, such as "Record saved successfully," will be displayed to the user.
  - **Form Reset**
    - Clicking the **Clear** button will reset all form fields to their default values after the user confirms the action.
  - **Navigation**
    - Clicking the **Previous** button will discard any unsaved changes and navigate the user back to the Purity Master Table View.

2.1.2.6 Data Requirements

None.

2.1.2.7 Non-Functional Requirements

None.

2.1.2.8 Configurations

None.

2.1.2.9 Flowchart

None.

2.1.2.10 Additional Notes

None.

2.1.3 Update Template

2.1.3.1 Purpose

The Update Template Master module allows users to modify existing template records in the system. This ensures that template details, such as wastage, stone rates, discounts, and other charges, remain accurate and up to date. By enabling seamless updates, this functionality helps maintain consistency and correctness in jewellery pricing and calculations.

2.1.3.2 User Type

Admin & Register Users

2.1.3.3 Screen Layout

Same Create Wastage Template Layout.

2.1.3.4 UI Elements

Same like Create Wastage Template layout

2.1.3.5 Functional Requirements

- **Initiate Update Process**
  - **Description:** The update process begins when the user clicks the **Edit** button in the Action column of the template table.
  - **Functionality:**
    - **Edit Button Action:**
      - Loads the selected Template's existing details (e.g., Template Name, Description, Wastage Type, Wastage on, Making Type, making on, Wastage, Making, Add on Wastage, Margin, Credit Breakup, Status, etc.) into the **Template Creation Form**.
      - Pre-populates all form fields with the current values of the selected template record to enable editing.
  - **Expected Outcome:** The **Template Creation Form** is populated with the selected template's current data, ready for modification.
- **Modify Template Details**
  - **Description:** Allows users to edit one or more fields of the template record, such as Name, Description, Wastage, Making, and Margin.
  - **Fields Available for Update:**
    - **Template Name:** Update the full name of the Template.
    - **Description:** Update the Template Description.
    - **Wastage Type:** Change the Wastage Type.
    - **Wastage On:** Change the Wastage calculation On.
    - **Making Type:** Change the Making Type.
    - **Making On:** Change the Making calculation on.
    - **Wastage:** Change the Wastage Value.
    - **Making:** Change the Making Value.
    - **Add on Wastage:** Change the Add on Wastage Value.
    - **Add on Wastage ON:** Change the Add on Wastage calculation on.

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- **Margin On Wastage:** Change the Wastage Margin value.
- **Margin On Making:** Change the Making Margin Value.
- **Credit Breakup:** Enable the Credit Breakup.
- **Credit Name:** Change the Credit Name.
- **Interest:** Enable the Interest.
- **Interest:** Change the Interest percentage.
- **Interest On**: Change the Interest calculation on.
- **Status:** Change the active status to "Active" or "De-active."

- **Expected Outcome:** Users can update any editable field(s) as required before saving the changes.

- **Form Validation (Update Mode)**

  - **Purpose:** Ensures that updated information meets required validation rules before submission.
  - **Validation Criteria:**
    - **Mandatory Fields:** The following fields must not be empty:
      - Template Name
      - Description
      - At least one of the following fields must have a value: Wastage or Making Charges
    - **Dependency Based on Mandatory Fields:**
      - The following fields must not be empty when the **Wastage** field has a value:
        - Wastage Type
        - Wastage On
      - The following fields must not be empty when the **Making Charges** field has a value:
        - Making Type
        - Making On (Based on Making Type)
      - The following fields must not be empty when the **Add on Wastage** field has a value:
        - Add on Wastage On
      - The following fields must not be empty when the **Credit Breakup** field has a value:
        - From Day
        - To Day
        - Credit Name
        - At least one of the following fields must have a value: Wastage or Making Charges
    - **Specific Field Validation:**
      - **Template Name:** Up to 50 characters, allows letters, spaces, numbers, and certain special characters.
      - **Description:** Up to 50 characters, allows letters, spaces, and certain special characters.
      - **Wastage:** Up to 10 characters, numeric values only.
      - **Making Charges:** Up to 10 characters, numeric values only.

    - **Add-On Wastage:** Up to 10 characters, numeric values only.
    - **Margin On Wastage:** Up to 10 characters, numeric values only.
    - **Margin On Making:** Up to 10 characters, numeric values only.
    - **Interest:** Up to 6 characters, numeric values only.
    - **From Day:** Up to 5 characters, numeric values only.
    - **To Day:** Up to 5 characters, numeric values only.
    - **Credit Name:** Up to 20 characters, allows letters, spaces, numbers, and certain special characters.
  - **Error Handling:** If validation fails, display specific error messages to guide the user, such as:
    - “Template Name is required”
    - "Wastage must contain numeric values only."
- **Expected Outcome:** All required fields are validated, and errors are displayed if any criteria are not met.

○ **Submit Updated Data**

- **Description:** Saves the modified data to the database upon successful validation.
- **Functionality:**
  - **Submit Button:**
    - Saves the updated Template details to the database and refreshes the template table to reflect the changes.
    - Displays a success message confirming the update, such as: "Template details have been successfully updated."
- **Expected Outcome:** The updated template record is stored in the database, and the user is notified of the successful update.

○ **Cancel Update**

- **Purpose:** Allows users to discard changes if they choose not to update the template record.
- **Functionality:**
  - **Cancel Option:** Users can cancel the update process by either closing the form or clicking the **Previous** button.
- **Expected Outcome:** The form closes without saving any changes, leaving the original template record intact.

○ **Confirmation Message**

- **Purpose:** Notifies the user that the update operation was successfully completed.
- **Functionality:**

- **Display Message:** Upon successful submission, a confirmation message is displayed, such as: " Template details have been successfully updated."

- **Expected Outcome:** The confirmation message assures the user that the updated data has been saved successfully.

2.1.3.6 Data Requirements

None.

2.1.3.7 Non-Functional Requirements

None.

2.1.3.8 Configurations

None.

2.1.3.9 Flowchart

None.

2.1.3.10 Additional Notes

None.

2.1.4 Remove Wastage Template

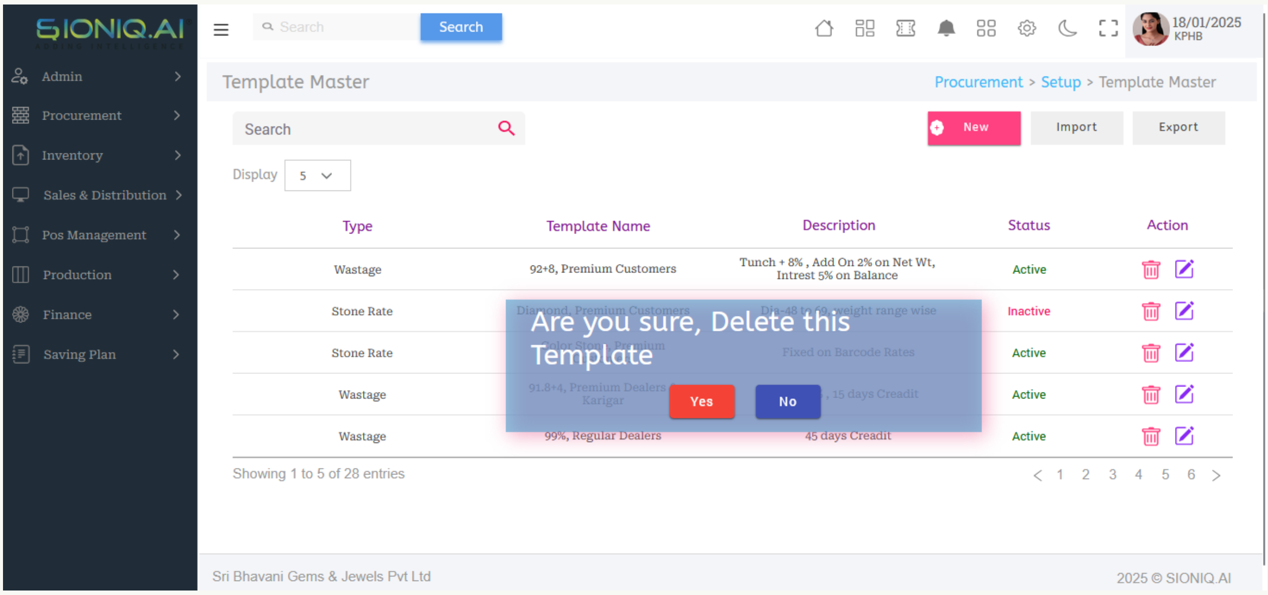
2.1.4.1 Purpose

The Remove Template Master functionality allows users to delete an existing template record from the system. This ensures that outdated or incorrect templates are removed, maintaining data accuracy and preventing clutter in the system. Deletion may be restricted if the template is associated with active transactions or dependencies.

2.1.4.2 User Type

Admin & Register Users

2.1.4.3 Screen Layout



2.1.4.4 UI Elements

None.

2.1.4.5 Functional Requirements

- **Access Control**
  - **Purpose**: Ensure that only authorized users can perform the delete operation for Template.
  - **Functionality**:
    - **Delete Permission**:
      - The **Delete** button is only accessible to users with delete permissions configured in the system's user roles and permissions settings.
    - **Expected Outcome**: Unauthorized users cannot access or initiate the delete process.

- **Initiate Delete Action**
  - **Description**: The delete process begins when an authorized user clicks the Delete button in the Action column of the template table.
  - **Functionality**:
    - **Delete Button Action**:
      - Prompts the user with a delete confirmation message to prevent accidental deletion.
    - **Expected Outcome**: The system displays a confirmation prompt, and no action is taken unless the user confirms the delete request.

- **Delete Confirmation Prompt**

- **Purpose**: To ensure the user intends to proceed with deletion and prevent accidental removal of data.
- **Functionality**:
  - **Confirmation Message**:
    - When the Delete button is clicked, the system displays a warning message:
      - "Are you sure you want to delete this Template?"
  - **Options**:
    - **Yes**: Confirms the deletion and proceeds with removing the Template record.
    - **No**: Cancels the delete action without making any changes.
  - **Expected Outcome**: The Template record is deleted only when the user confirms by selecting **Yes.**

- **Delete Execution:**
  - **Description**: After confirmation, the system marks the Template master record as deleted in the database.
  - **Functionality**:
    - **Data Removal**:
      - Updates the selected Template record's status to "Status=0" in the database.
    - **Dependencies Check**:
      - Before deletion, the system checks for any dependencies (e.g., associated branches, inventory, or transactions).
      - **If dependencies exist**:
        - Displays a message: "Cannot delete Template as it has associated records."
        - Halts the delete process until dependencies are resolved.
    - **Expected Outcome**: The system removes the record only when no dependencies are found.

- **Success Message**
  - **Purpose**: Inform the user that the delete action was successfully completed.
  - **Functionality**:
    - **Display Message**:
      - Upon successful deletion, display a success message such as:
        - " Template has been successfully deleted."
    - **Expected Outcome**: The user receives confirmation that the record was deleted.
- **Refresh Table View**
  - **Description**: Updates the Template Master table view to reflect the changes made by the deletion.
  - **Functionality**:
    - **Refresh Table**:
      - Automatically removes the deleted Template record from the list in the table view.
    - **Pagination Update**:

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    - Adjusts the pagination if necessary to ensure the remaining records are displayed correctly.
- **Expected Outcome**: The table reflects the updated state, with the deleted record no longer visible.

2.1.4.6 Data Requirements

None.

2.1.4.7 Non-Functional Requirements

None.

2.1.4.8 Configurations

None

2.1.4.9 Flowchart

None.

2.1.4.10 Additional Notes

None.

2.1.5 Create Stone Rate Template

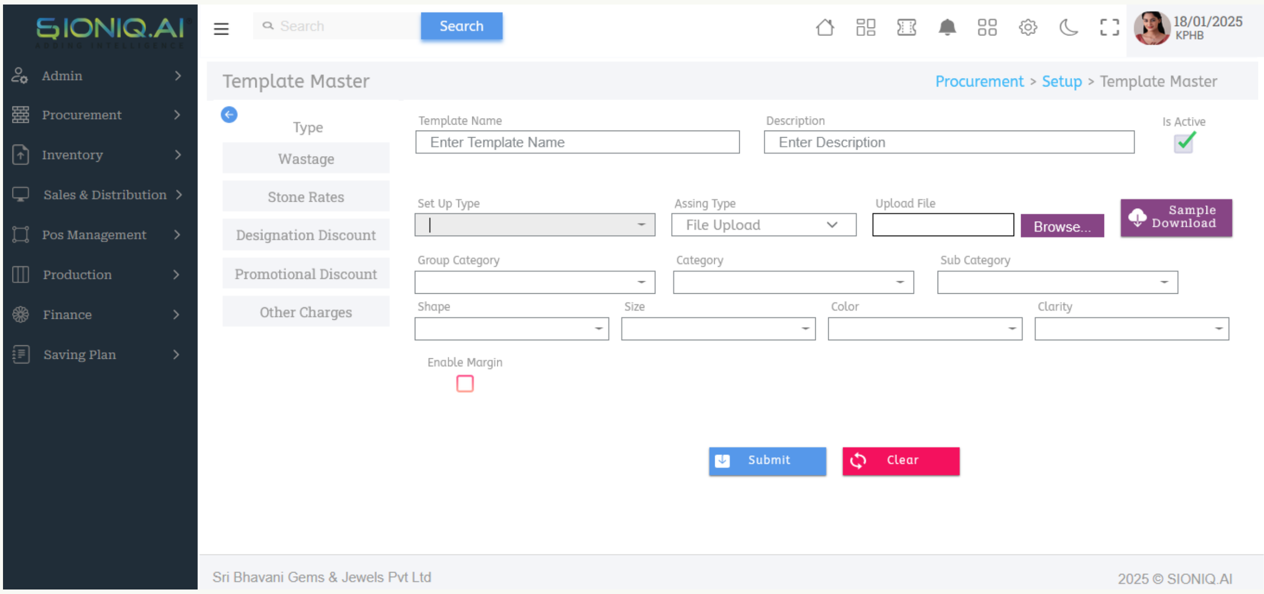
2.1.5.1 Purpose

The Create Stone Rate functionality is designed to establish and manage the pricing structure for various stones used in jewellery manufacturing and trading. This feature ensures accurate cost estimation, seamless rate updates, and integration with pricing workflows.

2.1.5.2 User Type

Registered Users, Admins.

2.1.5.3 Screen Layout



2.1.5.4 UI Elements

- **Action on New Button Click**
  - **Function:** When the New button is clicked on Template Master, the user will be directed to a new page that provides an interface to create a new Template master record.
  - Users can select from left side the following categories types:
    - Wastage
    - Stone Rates
    - Designation Discount
    - Promotional Discounts
    - Other Charges

- **Stones Rates**
  - **Template Name**
    - **Type:** Text Input
    - **Label:** Template
    - **Editable:** Yes
    - **Description:** Enter the Template for the template record.
    - **Validation:** Required field

  - **Description**
    - **Type:** Text Input
    - **Label:** Description
    - **Editable:** Yes

- **Description:** Enter the Description for the template record.
- **Validation:** Required field

- **Is Active**
  - **Type:** Checkbox
  - **Label:** Is Active
  - **Editable:** Yes
  - **Description:** Check this box to mark the template record as active.
  - **Validation:** Required field

- **Setup Type**
  - **Type:** Multi-Selection Dropdown
  - **Label:** Setup Type
  - **Editable:** Yes
  - **Description:** Select one or more setup types applicable for this template.
  - **Options:**
    - Stone Group Category
    - Stone Category
    - Stone Sub Category
    - Shape (Category 1)
    - Size (Category 2)
    - Colour (Category 3)
    - Clarity (Category 4)
  - **Behaviour**
    - **Stone Group Category**
      - Selecting this option enables the selection of broad **stone groupings** (e.g., Diamond, Gemstone, Synthetic).
      - Other dependent fields may be **filtered** based on the chosen group.
    - **Stone Category**
      - Allows selection of **specific stone types** under the selected group (e.g., Ruby, Sapphire, Emerald).
      - If no **Stone Group Category** is selected, all available stone categories are displayed.
      - If a **Stone Group Category** is selected, only relevant stone categories appear.
    - **Stone Sub Category**
      - Provides more refined classification (e.g., Natural Diamond, Lab-Grown Diamond).
      - Selection depends on the chosen **Stone Category**.

      - If no **Stone Category** is selected, this field remains disabled or shows all available options.
    - **Shape (Category 1)**
      - Allows selection of **stone shapes** (e.g., Round, Oval, Pear).
      - Selection may filter **Size** and **Colour** options.
    - **Size (Category 2)**
      - Enables input of **stone size options** (e.g., 0.25ct, 0.50ct, 1.00ct).
      - If **Shape** is selected, available sizes are filtered accordingly.
      - Size selection may impact available **Clarity** and **Colour** options.
    - **Colour (Category 3)**
      - Allows choosing **stone colours** (e.g., D, E, F for diamonds; Red, Blue, Green for gemstones).
      - Selection depends on the **Stone Group Category** and **Stone Category**.
      - May impact clarity options (e.g., higher clarity stones may have limited colour options).
    - **Clarity (Category 4)**
      - Allows selecting **clarity grades** (e.g., IF, VVS1, VS2 for diamonds).
      - Selection depends on the **Stone Group Category** and **Stone Category**.
      - May be restricted based on the **Size** and **Colour** selections.

- **Description:** Select one or more setup types applicable for this template. If any of the selected options below are chosen, details will update based on Stone Master.

- **Assign Type**
  - **Type:** Dropdown
  - **Label:** Assign Type
  - **Editable:** Yes
  - **Description:** Select how the assignment should be handled for this template.
  - **Options:**
    - Regular
    - File Upload
  - **Behavior:**
    - **Regular**
      - Enables **manual input fields** for data entry.
      - The user can enter values directly into the form.
      - No file selection or upload functionality is displayed.
      - Suitable for entering small sets of data.
    - **File Upload**
      - Displays a **file upload section** instead of manual input fields.

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- The user must **browse and select** a file for upload.
- **Description:** Select one or more setup types applicable for this template. If any of the selected options below are chosen, details will update based on Stone Master**.**

- **Actions Buttons:**
  - **Back (Button):**
    - **Type:** Button
    - **Label:** Back
    - **Action:** Navigate back to the previous screen.
  - **Submit (Button):**
    - **Type:** Button
    - **Label:** Submit
    - **Action:** Save the template record to the system.
  - **Clear (Button):**
    - **Type:** Button
    - **Label:** Clear
    - **Action:** Reset all fields in the form to their default state

2.1.5.5 Functional Requirements

- **Actions**
  - **Submit Button Click**
    - **Action**: The form submission is triggered when the user clicks the Submit button, provided all required fields (Type, Template name and Description) for template master are populated with valid values.
    - **Outcome**:
      - **Create Operation**: If it is a new entry, the system saves the new template master to the database.
      - **Update Operation**: If editing an existing entry, the system updates the existing template master record in the database.

- **Mandatory Fields**
  - **Fields**: Type, Template Name, Description, Status, Action are mandatory fields that must be completed.
  - **Behaviour**:
    - Users are required to enter valid values for each of the mandatory fields.
    - If any mandatory field is left blank, the form submission will be blocked, and an error message will be displayed indicating the missing fields.
  - **Conditional Validation**
    - **Field Format Validation**

- **Type**: The field must contain a Type.
- **Template Name**: The field must contain a Template Name.
- **Description**: The field must contain a Description.
- **Status**: This field accepts only numeric values.
- **Action**: This field accepts only numeric values.

- **Error Messages**
  - **Submit Attempt with Missing Values**
    - **Condition**: This condition occurs if one or more required fields are left empty when the user clicks the Submit button.
    - **Behaviour**: The system will display specific error messages indicating which fields are missing values.
    - **Message Examples**:
      - "Type is required" if the Location field is empty.
      - “Template Name is required" if the Location field is empty.
      - "Description is required" if the Group Category field is empty.

- **Behaviour**
  - **Successful Submission**
    - If all required fields are correctly filled in, the form data will be saved to the database, and a confirmation message, such as "Record saved successfully," will be displayed to the user.
  - **Form Reset**
    - Clicking the **Clear** button will reset all form fields to their default values after the user confirms the action.
  - **Navigation**
    - Clicking the **Previous** button will discard any unsaved changes and navigate the user back to the Template Master Table View.

2.1.5.6 Data Requirements

- **Set Up Type**
  - **Source:** Dynamically generated from the **Stone Category Setup Table**.
  - **Usage:** Populates the multi-selection checkbox dropdown in the Template Creation Form.
  - **Details:** Ensures accuracy and consistency in template data by dynamically reflecting available stone categories.
- **Stone Group Category**
  - **Source:** Retrieved from the **Stone Group Category Table**.
  - **Usage:** Populates the dropdown for selecting a stone group category in the Template Creation Form.

- **Details:** Maintains data integrity by ensuring accurate and consistent selection of stone group categories.

- **Stone Category**
  - **Source:** Retrieved from the **Stone Category Table**.
  - **Usage:** Populates the dropdown for selecting a stone category in the Template Creation Form.
  - **Details:** Ensures data accuracy by allowing users to select from predefined stone categories.
- **Stone Sub Category**
  - **Source:** Retrieved from the **Stone Sub Category Table**.
  - **Usage:** Populates the dropdown for selecting a stone sub-category in the Template Creation Form.
  - **Details:** Provides structured classification, ensuring consistency and accuracy in stone sub-category selection.
- **Stone Dynamic Category**
  - **Source:** Retrieved from the **Stone Dynamic Category Table**.
  - **Usage:** Populates the dropdown for selecting a dynamically categorized stone in the Template Creation Form.
  - **Details:** Ensures flexible and accurate classification of dynamically created stone categories

2.1.5.7 Non-Functional Requirements

None.

2.1.5.8 Configurations

None.

2.1.5.9 Flowchart

None.

2.1.5.10 Additional Notes

None.

2.1.6 Update Template

2.1.6.1 Purpose

The Update Stone Rates functionality allows users to modify existing stone prices based on market fluctuations, quality changes, and business requirements. It ensures accurate pricing across inventory, sales, and purchase modules while maintaining historical rate tracking. This feature supports bulk updates and

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validations to prevent errors and inconsistencies. Regular updates help maintain competitive and transparent pricing in jewellery operations.

2.1.6.2 User Type

Admin & Register Users

2.1.6.3 Screen Layout

Same Create Stone Rate Template Layout.

2.1.6.4 UI Elements

Same like Create Stone Rate Template layout

2.1.6.5 Functional Requirements

- **Initiate Update Process**
  - **Description:** The update process is initiated by clicking the Edit button in the Action column of the Template master.
  - **Functionality:**
    - **Edit Button Action:**
      - Loads the selected Template existing details (Type, Template Name, Description, must not be empty) into the template master form.
      - Pre-populates the form fields with the current values of the selected template record for editing.
  - **Expected Outcome:** The template master form is populated with the selected template's current data, ready for modification.

- **Modify Purity Details:**
  - **Description:** Allows users to change one or more fields in the template master record, such as and the remaining checkboxes.
  - **Fields Available for Update:**
    - **Type**
    - **Data Type:** String
    - **Values:** Stone Rate
    - **Description:** Displays the type of template, such as Stone Rate.
    - **Functionality:** Users can update the type to categorize the template accordingly.
  - **Template Name**
    - **Data Type:** String
    - **Values:** Premium Customers, Regular Customers, Premium Dealers, Regular Dealers
    - **Description:** Displays the name assigned to the template for classification.

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- **Functionality:** Users can modify the template name to suit different customer or dealer categories.
- **Description**
  - **Data Type:** String
  - **Values:** Interest on Balance, Weight Range Wise, 15 Days Credit, 45 Days Credit
  - **Description:** Provides additional details about the template's purpose and criteria.
  - **Functionality:** Users can update the description to reflect any changes in template conditions or policies.
- **Fields Available for Update:**
  - **Type:** Modify the type to ensure alignment with the updated template category.
    - **Condition:** If any transaction entry is associated with the Type, it cannot be modified or edited in the Template Master.
  - **Template Name:** Update the Template Name to reflect necessary changes.
  - **Description:** Update the Description to reflect necessary changes.
- **Expected Outcome:** Users can update all editable fields before saving the record.

- **Form Validation (Update Mode)**
  - **Purpose:** Ensures that updated information meets validation requirements before submission.
    - **Validation Criteria:**
      - **Mandatory Fields:** (Type, Template Name, Description) for Template master must not be empty.
    - **Error Handling:** If validation fails, display specific error messages to guide the user (e.g., "Type, Template Name, Description, Status, Action").
  - **Expected Outcome:** All required fields are validated, and any errors are shown to the user before submission.

- **Submit Updated Data**
  - **Description:** Saves the modified data to the database upon successful validation.
  - **Functionality:**
    - **Submit Button:**
      - Saves the updated Template master data to the database and refreshes the table to reflect changes.
      - Displays a success message to confirm the update (e.g., "Template Master details have been successfully updated").
  - **Expected Outcome:** The updated template is stored in the database, and the user receives confirmation of the successful update.

- **Cancel Update**
  - **Purpose:** Allows users to discard changes if they choose not to update the Template master record.

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- **Functionality:**
  - **Cancel Option:** Users can cancel the update operation by closing the form or clicking a "Previous" button.
  - **Expected Outcome:** The form closes without saving changes, leaving the original template master record intact.

- **Confirmation Message**

- **Purpose:** Notifies the user of the successful completion of the update operation.
- **Functionality:**
  - **Display message:** upon a successful update (e.g., "Template Master have been successfully updated").

- **Expected Outcome:** The confirmation message assures the user that the changes were saved.

2.1.6.6 Data Requirements

None.

2.1.6.7 Non-Functional Requirements

None.

2.1.6.8 Configurations

None.

2.1.6.9 Flowchart

None.

2.1.6.10 Additional Notes

None.

2.1.7 Remove Template

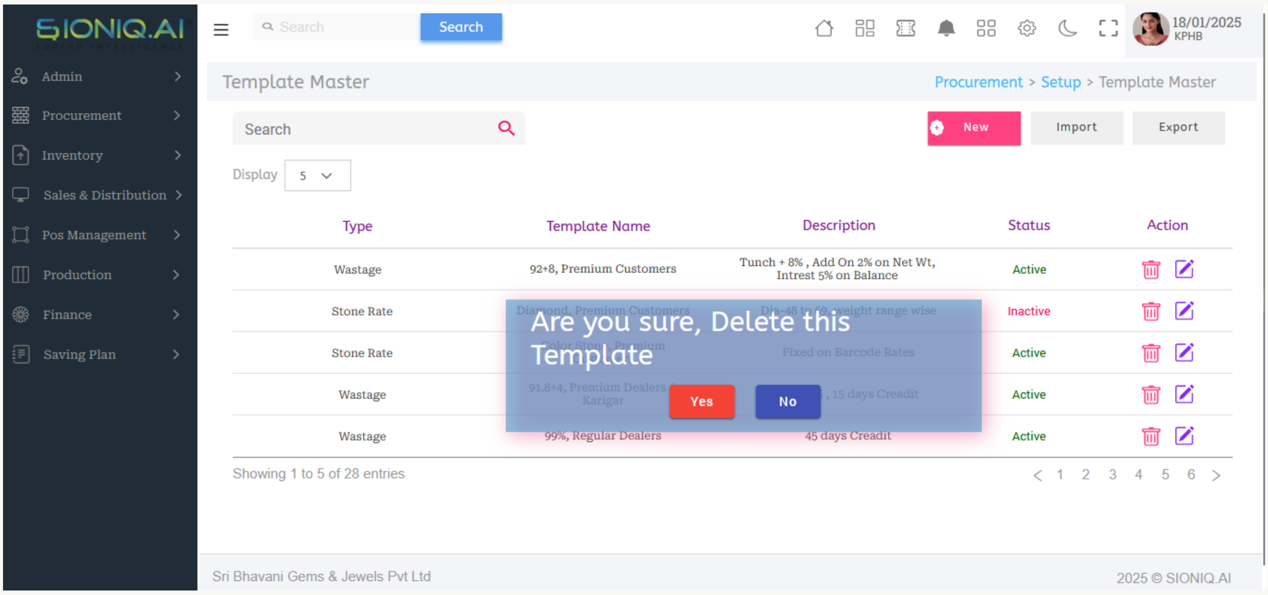
2.1.7.1 Purpose

The Remove Stone Rates functionality allows users to delete outdated or incorrect stone pricing records to maintain data accuracy. It helps prevent the use of obsolete rates in transactions, ensuring consistency in jewellery costing. This feature includes validation checks to avoid accidental deletions. Removing unnecessary rates optimizes database performance and streamlines pricing management.

2.1.7.2 User Type

Admin & Register Users

2.1.7.3 Screen Layout



2.1.7.4 UI Elements

None.

2.1.7.5 Functional Requirements

- **Access Control**
  - **Purpose**: Ensure that only authorized users can perform the delete operation for Template.
  - **Functionality**:
    - **Delete Permission**:
      - The **Delete** button is only accessible to users with delete permissions configured in the system's user roles and permissions settings.
    - **Expected Outcome**: Unauthorized users cannot access or initiate the delete process.

- **Initiate Delete Action**
  - **Description**: The delete process begins when an authorized user clicks the Delete button in the Action column of the template table.
  - **Functionality**:
    - **Delete Button Action**:
      - Prompts the user with a delete confirmation message to prevent accidental deletion.
    - **Expected Outcome**: The system displays a confirmation prompt, and no action is taken unless the user confirms the delete request.

- **Delete Confirmation Prompt**

- **Purpose**: To ensure the user intends to proceed with deletion and prevent accidental removal of data.
- **Functionality**:
    - **Confirmation Message**:
        - When the Delete button is clicked, the system displays a warning message:
            - "Are you sure you want to delete this Template?"
    - **Options**:
        - **Yes**: Confirms the deletion and proceeds with removing the Template record.
        - **No**: Cancels the delete action without making any changes.
    - **Expected Outcome**: The Template record is deleted only when the user confirms by selecting **Yes.**

- **Delete Execution:**
    - **Description**: After confirmation, the system marks the Template master record as deleted in the database.
    - **Functionality**:
        - **Data Removal**:
            - Updates the selected Template record's status to "Status=0" in the database.
        - **Dependencies Check**:
            - Before deletion, the system checks for any dependencies (e.g., associated branches, inventory, or transactions).
            - **If dependencies exist**:
                - Displays a message: "Cannot delete Template as it has associated records."
                - Halts the delete process until dependencies are resolved.
        - **Expected Outcome**: The system removes the record only when no dependencies are found.

- **Success Message**
    - **Purpose**: Inform the user that the delete action was successfully completed.
    - **Functionality**:
        - **Display Message**:
            - Upon successful deletion, display a success message such as:
                - " Template has been successfully deleted."
        - **Expected Outcome**: The user receives confirmation that the record was deleted.
- **Refresh Table View**
    - **Description**: Updates the Template Master table view to reflect the changes made by the deletion.
    - **Functionality**:
        - **Refresh Table**:
            - Automatically removes the deleted Template record from the list in the table view.
        - **Pagination Update**:

    - Adjusts the pagination if necessary to ensure the remaining records are displayed correctly.
- **Expected Outcome**: The table reflects the updated state, with the deleted record no longer visible.

2.1.7.6 Data Requirements

None.

2.1.7.7 Non-Functional Requirements

None.

2.1.7.8 Configurations

None

2.1.7.9 Flowchart

None.

2.1.7.10 Additional Notes

None.

2.2 Customer Wastage

Customer Wastage Management tracks and controls material wastage in customer transactions within the jewellery industry. It ensures transparency, optimizes resource utilization, and minimizes losses. The system automates data management for accuracy and efficiency. This enhances compliance with industry standards while improving operational control.

2.2.1 Data View

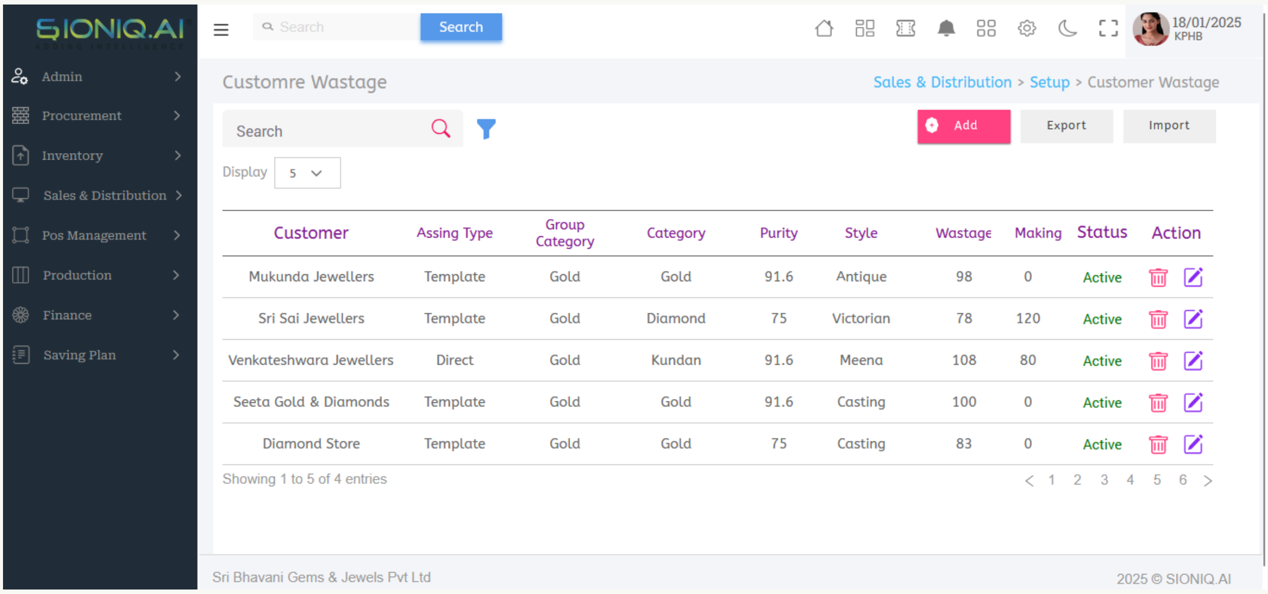
2.2.1.1 Purpose

The purpose of Customer Wastage Management is to monitor and control material wastage during customer transactions in the jewellery industry. It helps reduce losses, optimize resource usage, and ensure transparency. The system enhances accuracy through automated tracking and data management. Ultimately, it improves efficiency, compliance, and operational control.

2.2.1.2 User Type

Registered Users, Admins.

2.2.1.3 Screen Layout



2.2.1.4 UI Elements

- **Search Option**
  - **Description**: A search bar located at the top of the data view section to filter the Customer Wastage records displayed in the table.
  - **Functionality**:
    - Enabled users to search by Customer, Assing Type, Group Category, Category, Purity, Style, Wastage, Making, Status, Action.
    - Dynamically updates the displayed table to show only results that match the search query.
- **Display Dropdown**
  - **Description**: A dropdown control to set the number of rows shown in the table at once.
  - **Options**: Common choices (e.g., 5, 10, 25, 50, 100 rows per page).
  - **Functionality**:
    - Allows users to control the number of Customer Wastage records displayed per page.
    - Updates the table view immediately based on the selected number of rows.
- **Buttons**
  - **New Button**
    - **Label**: "New"

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- **Functionality**: Opens the Customer Wastage form to add a New Customer Wastage record.

- **Export Button**
  - **Label**: "Export" (or Icon button as specified)
  - **Functionality**: Allows users to export the displayed Customer Wastage data in various file formats (Excel).
  - **Export Options**: Exports all or filtered data based on the current table view and search filter.
- **Import Button**
  - **Label**: "Import" (or Icon button as specified)
  - **Functionality**: Redirects to the Import Form page, where users can upload Customer Wastage data.

- **Tabular View**
  - **Description**: The Tabular View provides a comprehensive and structured representation of all Customer Wastage details registered in the system. It enables users to view, manage, and perform actions on Wastage data efficiently.
  - **Columns**:
    - **Customer**: Displays the name of the customer (e.g. Mukunda Jewellers, Vinathi Jewellers, Omkar Jewellers).
    - **Assing Type**: Specifies how wastage is assigned (e.g., Template, Direct, Fixed, Percentage, etc.).
    - **Group Category**: The main category grouping (e.g., Gold, Silver, Diamond).
    - **Category:** The specific category under the group (e.g., Gold, Diamond, Kundan).
    - **Purity:** Indicates the purity level of the material (e.g., 91.6, 75k, 18K, 22K, 24K for gold).
    - **Style:** Represents the design/style of the jewellery (e.g. Antique, Casting, Meena, Victorian etc).
    - **Wastage:** The wastage percentage or value applied to the Customer (e.g. 98, 78, 100, etc).
    - **Making:** The making charge applied for the Customer (e.g. 100, 80, etc).
  - **Status Values**:
    - **Active**: If the checkbox is checked in the form.
    - **Inactive**: If the checkbox is unchecked in the form.

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- **Action**:
  - **Delete**: Deletes the selected Customer Wastage record (permission-based).
  - **Functionality**: Triggers a delete confirmation prompt before proceeding.
  - **Edit**: Allows modification of the Customer Wastage information (permission-based).
  - **Functionality**: Opens the Customer Wastage form populated with the selected Customer Wastage data for editing.

- **Paging for Table View**
  - **Description**: Includes pagination controls at the bottom of the table for navigating through multiple pages of Customer Wastage records.
  - **Functionality**:
    - Displays navigation buttons (e.g., "Previous", "Next") to move between pages.
    - Shows page numbers to allow users to jump directly to specific pages.
    - Updates the displayed Wastage master records based on the selected page.

2.2.1.5 Functional Requirements

Refer to the above **UI Elements** section for specific functionalities associated with each element.

2.2.1.6 Data Requirements

- **Data Source**
  - The data displayed in the Customer Wastage Tabular View is sourced from the Customer Wastage Master Table.
  - **Fields and Requirements**:
    - **Customer**: Displays the customer's name associated with the wastage details.
    - **Assign Type**: Displays the assignment type, such as "Template" "Direct" "Fixed" or "Percentage".
    - **Group Category**: Displays the main category, such as Gold, Silver, Diamond.
    - **Category**: Displays the jewellery category, such as Gold, Diamond, Kundan.
    - **Purity**: Displays the purity level, such as 91.6, 75k, 18K, 22K, 24K.
    - **Style**: Displays the style of the jewellery, such as Casting, Meena, Victorian, Antique.
    - **Wastage**: Displays the wastage percentage or value applied to the vendor.
    - **Making Charges**: Displays the making charges applicable to the vendor.

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- **Status**: Displays the current status of the Vendor Wastage (e.g., Active or Inactive).
- **Action**: Provides options to Edit or Delete the respective Vendor Wastage record.

- **Usage**
  - The table data is used for operational decisions, navigation, and reporting. All fields are searchable and filterable based on the requirements.

2.2.1.7 Non-Functional Requirements

None.

2.2.1.8 Configurations

- **Functionality**:
  - **Permission Settings**: Controls the visibility and accessibility of buttons and actions based on user roles or permissions.
- **Available Permissions**:
  - **Add Customer Wastage Permission**: Grants access to the "Add" button.
  - **Export Permission**: Grants access to the Export button for exporting data.
  - **Import Permission**: Grants access to the Import button for importing data.
  - **Edit Permission**: Allows users to access the Edit button in the Action column to modify records.
  - **Delete Permission**: Allows users to access the Delete button in the Action column to delete records.
- **Permission Assignment**: Admins or authorized users can assign permissions to individual users or user roles.

2.2.1.9 Flowchart

None.

2.2.1.10 Additional Notes

None.

2.2.2 Create Customer Wastage

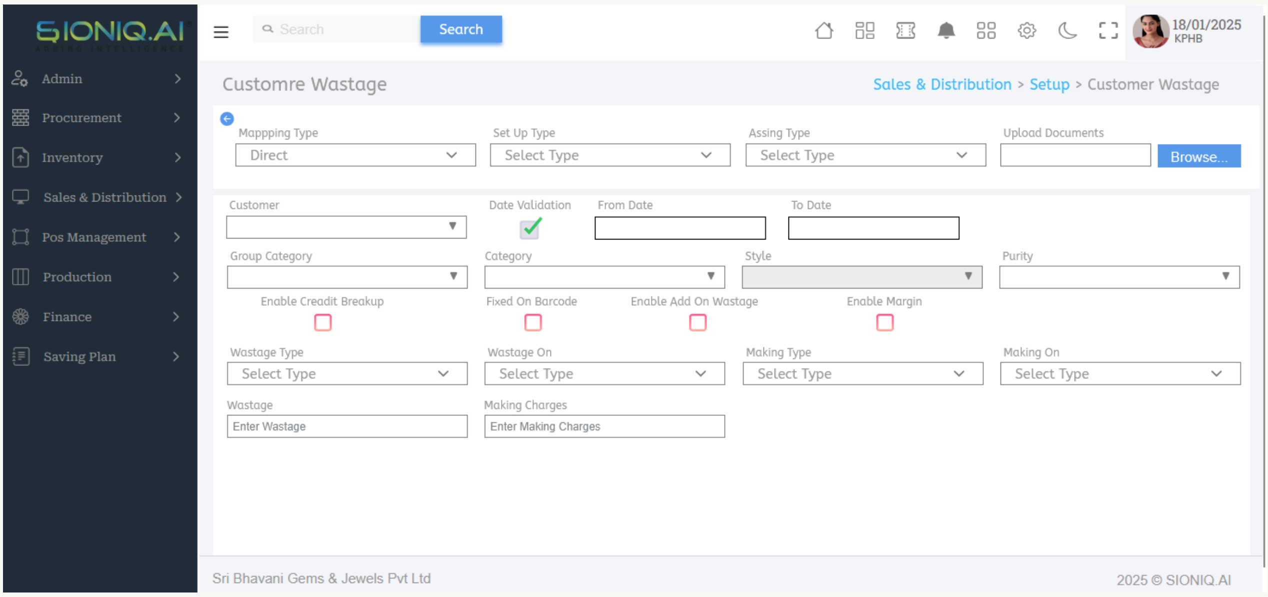
2.2.2.1 Purpose

The Create Customer Wastage module records material wastage by customer, including type, quantity, and cost. It helps track vendor efficiency, minimize losses, and improve cost control. This ensures transparency and accountability in jewellery production.

2.2.2.2 User Type

Registered Users, Admins.

2.2.2.3 Screen Layout



2.2.2.4 UI Elements

○ **Mapping Type**

- **Type**: Dropdown
- **Label**: Mapping Type
- **Editable**: Yes
- **Description**: Select the mapping type to define the relationship between the vendor and wastage rules.
- **Options**:
  - Direct
  - Template
  - Customer to Customer Mapping
- **Validation**: Required field

UI Elements for "Customer to Customer Mapping" Selection

○ **Retrieve from Customer**

- **Type**: Dropdown
- **Label**: Retrieve from Customer
- **Editable**: Yes

- **Description**: Select the customer whose assigned wastage rules need to be retrieved.
- **Options**: Import Customer's
    - **Source**: Customer Wastage Table
- **Validation**: Required field

- **Sync to Customer**
    - **Type**: Dropdown
    - **Label**: Sync to Customer
    - **Editable**: Yes
    - **Description**: Select the customer to whom wastage rules will be synced.
    - **Options**: Import Customer's
        - **Source**: Vendor Table
    - **Validation**: Required field
    - **Behavior**: Displays only customer who have not been assigned wastage rules.
- **Upload File**
    - **Type**: File Upload
    - **Label**: Upload File
    - **Editable**: Yes
    - **Description**: Upload a file containing customer wastage details.
    - **Validation**: Required field (Only CSV, XLSX, or other supported formats)

UI Elements for "Template" and "Direct" Selection

- **Setup Type**
    - **Type**: Dropdown
    - **Label**: Setup Type
    - **Editable**: Yes
    - **Description**: Choose how the customer wastage rules will be set up.
    - **Options**: Import Article's
        - **Source**: Article Master
    - **Validation**: Required field

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- **Assign Type**
  - **Type**: Dropdown
  - **Label**: Assign Type
  - **Editable**: Yes
  - **Description**: Define how the wastage is assigned to the customer.
  - **Options**:
    - Classification
    - Customer
    - Customer – Cost Centre
  - **Validation**: Required field
- **Upload File**
  - **Type**: File Upload
  - **Label**: Upload File
  - **Editable**: Yes
  - **Description**: Upload a file containing customer wastage details.
  - **Validation**: Required field (Only CSV, XLSX, or other supported formats)

Conditional UI Elements Based on "Assign Type" Selection

- **Classification**
  - **Type**: Dropdown
  - **Label**: Classification
  - **Editable**: Yes
  - **Description**: Select the classification for customer wastage assignment.
  - **Options**: Import Classification
    - **Source**: Vendor Classification Table
  - **Validation**: Required field
  - **Behavior**: Displays when "Assign Type" is set to "Classification".
- **Customer**
  - **Type**: Dropdown
  - **Label**: Customer

- **Editable**: Yes
- **Description**: Select the Customer for wastage assignment.
- **Options**: Import Customer
  - **Source**: Vendor Table
- **Validation**: Required field
- **Behavior**: Displays when "Assign Type" is set to "Customer" or "Customer – Cost Centre".

- **Cost Center**
  - **Type**: Dropdown
  - **Label**: Cost Center
  - **Editable**: Yes
  - **Description**: Select the cost center for customer wastage assignment.
  - **Options**: Import customer Cost Center
    - **Source**: Vendor Table
  - **Validation**: Required field
  - **Behavior**:
    - Displays when "Assign Type" is set to "Customer – Cost Centre".
    - Filters based on the selected Customer.

Date Validation UI Elements

- **Date Validation**
  - **Type**: Checkbox
  - **Label**: Date Validation
  - **Editable**: Yes
  - **Description**: Enable validation for assigned wastage based on a date range.
  - **Validation**: Optional
  - **Behavior**:
    - When checked, displays "From Date" and "To Date" fields.
    - When unchecked, hides "From Date" and "To Date" fields.
- **From Date**
  - **Type**: Date Input

- **Label**: From Date
- **Editable**: Yes
- **Description**: Specifies the starting date for assigned wastage validation.
- **Validation**: Required if "Date Validation" checkbox is checked.

- **To Date**
  - **Type**: Date Input
  - **Label**: To Date
  - **Editable**: Yes
  - **Description**: Specifies the ending date for assigned wastage validation.
  - **Validation**: Required if "Date Validation" checkbox is checked.

Category and Purity Selection UI Elements

- **Group Category**
  - **Type**: Multi-Selection Dropdown
  - **Label**: Group Category
  - **Editable**: Yes
  - **Description**: Select the group category for customer wastage assignment.
  - **Options**: Import Group Category
    - **Source**: Group Category Table
  - **Validation**: Required field
- **Purity**
  - **Type**: Multi-Selection Dropdown
  - **Label**: Purity
  - **Editable**: Yes
  - **Description**: Select the purity levels applicable for customer wastage.
  - **Options**: Import Purity
    - **Source**: Purity Table
  - **Validation**: Required field

Conditional UI Elements Based on "Setup Type" Selection

- **Category**

- **Type**: Multi-Selection Dropdown
- **Label**: Category
- **Editable**: Yes
- **Description**: Select the category for customer wastage assignment.
- **Options**: Import Category
    - **Source**: Category Table
- **Validation**: Required field
- **Behavior**:
    - Displays when "Setup Type" is set to "Category" or any dynamic category.
    - Filters based on the selected Group Category.

- **Dynamic Categories**
    - **Type**: Multi-Selection Dropdown
    - **Label**: Dynamic Category Alias Name
    - **Editable**: Yes
    - **Description**: Select the dynamic category alias for customer wastage assignment.
    - **Options**: Import Dynamic Category
        - **Source**: Dynamic Category Table
    - **Validation**: Required field
    - **Behavior**:
        - Displays when "Setup Type" is set to "Dynamic Category".
        - Filters based on the selected Group Category and Category.

Template Selection UI Elements

- **Template**
    - **Type**: Dropdown
    - **Label**: Template
    - **Editable**: Yes
    - **Description**: Select the customer wastage template for assignment.
    - **Options**: Import Wastage Templates
        - **Source**: Procurement Template Table

- **Validation**: Required field

Direct Selection UI Elements

- **Fixed on Barcode**
  - **Type:** Checkbox
  - **Label:** Fixed on Barcode
  - **Editable:** Yes
  - **Description:** If Checked wastage entry fields will be hidden and wastage will be entered at the time of barcoding.
  - **Validation:** Optional
  - **Behaviour**:
    - **Checked**: Hides wastage and making fields, wastage and making will be enter at barcoding stage
    - **Unchecked:** Displays wastage and making fields for manual entry.
- **Enable Credit Breakup**
  - **Type:** Checkbox
  - **Label:** Enable Credit Breakup
  - **Editable:** Yes
  - **Description:** Check this box to enable credit breakup for this customer.
  - **Validation:** Optional field
- **Enable Add on Wastage**
  - **Type:** Checkbox
  - **Label:** Enable Add on Wastage
  - **Editable:** Yes
  - **Description:** Check this box to enable additional wastage for this customer.
  - **Validation:** Optional field
- **Enable Margin**

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- **Type:** Checkbox
- **Label:** Enable Margin
- **Editable:** Yes
- **Description:** Check this box to enable margin for this customer.
- **Validation:** Required field

- **Wastage Type**
  - **Type:** Dropdown
  - **Label:** Wastage Type
  - **Editable:** Yes
  - **Description:** Select the wastage type for the customer.
  - **Options:**
    - Purity Percentage
    - Tunch
    - Wastage
    - Direct Wastage
  - **Behavior:**
    - **Purity Percentage:** Wastage is calculated based on the purity percentage of the metal.
    - **Tunch:** Wastage is determined by the tunch value, a measurement of gold purity.
    - **Wastage:** Direct wastage is applied as per predefined values.
    - **Direct Wastage:** A fixed wastage weight is applied directly.

- **Wastage On**
  - **Type:** Dropdown
  - **Label:** Wastage On
  - **Editable:** Yes
  - **Description:** Select how wastage is calculated for the customer.
  - **Options:**
    - Gross Weight
    - Net Weight
    - Calculated
  - **Behavior:**
    - **Gross Weight:** Wastage is calculated on the total weight of the item.

- **Net Weight:** Wastage is calculated based on the net weight (excluding additional elements like stones).
- **Calculated:** Wastage is dynamically calculated based on additional parameters.

- **Making Type**
  - **Type:** Dropdown
  - **Label:** Making Type
  - **Editable:** Yes
  - **Description:** Select the making type for the customer.
  - **Options:**
    - Per Gram
    - Per Unit
    - Direct
  - **Behavior:**
    - **Per Gram:** Making charges are applied based on weight per gram.
    - **Per Unit:** Making charges are applied per item (fixed cost per piece).
    - **Direct:** Making charges are predefined and directly applied.

- **Making On**
  - **Type:** Dropdown
  - **Label:** Making On
  - **Editable:** Yes
  - **Description:** Select how making charges are applied for the customer.
  - **Options:**
    - Gross Weight
    - Net Weight
    - Wastage + Gross Weight
    - Wastage + Net Weight
    - Wastage
    - Calculated
  - **Behavior:**
    - **Gross Weight:** Making charges are applied to the total weight.
    - **Net Weight:** Making charges are applied to the weight excluding additional elements.
    - **Wastage + Gross Weight:** Making charges are applied based on both wastage and total weight.
    - **Wastage + Net Weight:** Making charges are calculated on wastage plus net weight.
    - **Wastage:** Making charges are applied only to wastage weight.
    - **Calculated:** Making charges are derived dynamically based on multiple parameters.

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- **Wastage**
  - **Type:** Text Input
  - **Label:** Wastage
  - **Editable:** Yes
  - **Description:** Enter the wastage value for the customer.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 10 characters
    - **Allowed Characters:** Numeric values only.
- **Making Charges**
  - **Type:** Text Input
  - **Label:** Making Charges
  - **Editable:** Yes
  - **Description:** Enter the making charges for the customer.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 10 characters
    - **Allowed Characters:** Numeric values only.

Fields Displayed When "Enable Credit Breakup" is Checked

- **From Day**
  - **Type:** Text Input
  - **Label:** From Day
  - **Editable:** Yes
  - **Description:** Enter the starting day for the credit breakup period.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 05 characters
    - **Allowed Characters:** Numeric values only.
- **To Day**
  - **Type:** Text Input
  - **Label:** To Day
  - **Editable:** Yes

- **Description:** Enter the ending day for the credit breakup period.
- **Validation:**
  - **Required:** Yes
  - **Character Limit:** 05 characters
  - **Allowed Characters:** Numeric values only.

- **Credit Name**
  - **Type:** Text Input
  - **Label:** Credit Name
  - **Editable:** Yes
  - **Description:** Enter the credit name for the customer.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 20 characters
    - **Allowed Characters:** Numeric, Letters, Space, and Special characters.
- **Enable Interest**
  - **Type:** Checkbox
  - **Label:** Enable Interest
  - **Editable:** Yes
  - **Description:** Check this box to enable interest for this customer.
  - **Validation:** Optional field
- **Enable Margin**
  - **Type:** Checkbox
  - **Label:** Enable Margin
  - **Editable:** Yes
  - **Description:** Check this box to enable margin for this customer.
  - **Validation:** Optional field
- **Enable Add on Wastage**
  - **Type:** Checkbox
  - **Label:** Enable Add on Wastage
  - **Editable:** Yes
  - **Description:** Check this box to enable additional wastage for this customer.
  - **Validation:** Optional field

Fields Displayed When "Enable Interest" is Checked

- **Interest %**
  - **Type:** Text Input
  - **Label:** Interest %
  - **Editable:** Yes
  - **Description:** Enter the interest percentage for the customer.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 06 characters
    - **Allowed Characters:** Numeric values only.
- **Interest On**
  - **Type:** Dropdown
  - **Label:** Interest On
  - **Editable:** Yes
  - **Description:** Select the method for calculating interest.
  - **Options:**
    - Voucher Balance
    - Voucher Pure Weight
    - Voucher Wastage
    - Voucher Gross Weight
    - Voucher Net Weight
    - Bill Amount
  - **Behavior:**
    - **Voucher Balance**
      - Interest is calculated on the remaining balance of the voucher.
      - If the balance is zero, no interest is applied.
    - **Voucher Pure Weight**
      - Interest is calculated based on the **pure weight** of the metal in the voucher.
      - Pure weight = (Net weight × Purity percentage).
      - Used when interest is determined by the actual precious metal content.
    - **Voucher Wastage**
      - Interest is applied to the **wastage value** recorded in the voucher.
      - Typically used when wastage is an essential cost factor in pricing.
    - **Voucher Gross Weight**
      - Interest is calculated on the **total gross weight** of the item.
      - Includes stones, beads, and other elements along with the metal.
    - **Voucher Net Weight**

    - Interest is applied only on the **net metal weight** (excluding stones and non-metal parts).
    - Commonly used for transactions based on the actual weight of the metal.
  - **Bill Amount**
    - Interest is calculated on the **total invoice/bill amount**.
    - Includes all charges such as metal cost, wastage, making charges, and taxes.
    - Used when interest is applied at the financial level rather than weight-based.

Fields Displayed When "Enable Margin" is Checked

- **Margin on Wastage**
  - **Type:** Text Input
  - **Label:** Margin on Wastage
  - **Editable:** Yes
  - **Description:** Enter the margin percentage for wastage.
  - **Validation:**
    - **Required:** Optional
    - **Character Limit:** 10 characters
    - **Allowed Characters:** Numeric values only.
- **Margin on Making**
  - **Type:** Text Input
  - **Label:** Margin on Making
  - **Editable:** Yes
  - **Description:** Enter the margin percentage for making charges.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 20 characters
    - **Allowed Characters:** Numeric values only.

Fields Displayed When "Enable Add on Wastage" is Checked

- **Add On Wastage %**
  - **Type:** Text Input
  - **Label:** Add On Wastage %
  - **Editable:** Yes
  - **Description:** Enter the additional wastage percentage.
  - **Validation:**
    - **Required:** Yes

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- **Character Limit:** 20 characters
- **Allowed Characters:** Numeric values only.

- **Add On Wastage On**
  - **Type:** Dropdown
  - **Label:** Add On Wastage On
  - **Editable:** Yes
  - **Description:** Select how the additional wastage is applied.
  - **Options:**
    - Select Type
    - Gross Weight
    - Net Weight
    - Wastage + Gross Weight
    - Wastage + Net Weight
    - Wastage
    - Calculated
  - **Behavior:**
    - **Gross Weight:** Making charges are applied to the total weight.
    - **Net Weight:** Making charges are applied to the weight excluding additional elements.
    - **Wastage + Gross Weight:** Making charges are applied based on both wastage and total weight.
    - **Wastage + Net Weight:** Making charges are calculated on wastage plus net weight.
    - **Wastage:** Making charges are applied only to wastage weight.
    - **Calculated:** Making charges are derived dynamically based on multiple parameters.

- **Is Active**
  - **Type**: Checkbox
  - **Label**: "Is Active"
  - **Editable**: Yes
  - **Default Value**: Checked (True)
  - **Behavior**:
    - **Checked**: The Alloy is marked as active and visible in the system (e.g., dropdowns, lists).
    - **Unchecked**: The Alloy is inactive but remains in the database.

- **Submit Button**
  - **Type**: Button
  - **Label**: "Submit"

- **Editable**: No (Standard Button)
- **Description**: Submits the filled form data to the database.
- **Validation**:
  - **Required Fields**: Ensures all mandatory fields are filled and validated.
- **Behavior**:
  - **Successful Submission**: Form data is saved to the database.
  - **Failed Validation**: Displays an error message highlighting the fields requiring correction.

- **Clear Button**
  - **Type**: Button
  - **Label**: "Clear"
  - **Editable**: No (Standard Button)
  - **Description**: Resets or clears all form fields, enabling a fresh start.
  - **Validation**: None required.
  - **Behavior**:
    - **Reset Form Fields**: Clears all data entered in the form fields.
    - **Confirmation Prompt**: Prompts the user to confirm the action to prevent accidental data loss.

- **Previous Button**
  - **Type**: Button
  - **Label**: "Previous Icon"
  - **Editable**: No (Standard Button)
  - **Description**: Closes the Alloy Creation Form and returns the user to the main Alloy table view, discarding unsaved changes.
  - **Validation**: None required.

2.2.2.5 Functional Requirements

- **Actions**
  - **Submit Button Click**
    - **Action**: Triggers form submission if all required fields contain valid values.
    - **Outcome**:

- Create Operation: If it's a new entry, saves the vendor wastage mapping details.
- Update Operation: If an existing entry is modified, updates the respective vendor wastage record.

- **Validation**
  - Mandatory Fields
    - **Fields**: The following fields are required for submission based on the selected mapping type:
      - **General Mandatory Fields**:
        - Mapping Type
      - **For "Customer to Customer Mapping" Selection**:
        - Retrieve from Customer
        - Sync to Customer
        - Upload File (if applicable)
      - **For "Template" Selection**:
        - Setup Type
        - Assign Type
      - **Conditional Mandatory Fields Based on Assign Type**:
        - Classification (if Assign Type = Classification)
        - Customer (if Assign Type = Customer or Customer – Cost Centre)
        - Cost Center (if Assign Type = Customer – Cost Centre)
      - **Date Validation (if enabled)**:
        - From Date
        - To Date
    - **Behavior**:
      - Users must enter values in each mandatory input field.
      - If any mandatory field is left empty, form submission is blocked, and an error message is displayed.

- **Error Messages**
  - **Submit Attempt with Missing Values**
    - **Condition**: If one or more required fields are missing when the user clicks Submit.
    - **Behavior**: The system displays a specific error message indicating which field(s) are missing values.
    - **Message Examples**:
      - "Mapping Type is required" if the Mapping Type field is empty.
      - "Retrieve from Customer is required" if the Retrieve from Customer field is empty when " Customer to Customer Mapping" is selected.

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- "Setup Type is required" if the Setup Type field is empty when "Template" is selected.
- "Assign Type is required" if the Assign Type field is empty when "Template" is selected.
- "Classification is required" if the Assign Type is "Classification" and the Classification field is empty.
- " Customer is required" if the Assign Type is " Customer " or " Customer – Cost Centre" and the Vendor field is empty.
- "Cost Center is required" if the Assign Type is " Customer – Cost Centre" and the Cost Center field is empty.
- "From Date and To Date are required" if the Date Validation checkbox is checked but no dates are entered

2.2.2.6 Data Requirements

None.

2.2.2.7 Non-Functional Requirements

None.

2.2.2.8 Configurations

None.

2.2.2.9 Flowchart

None.

2.2.2.10 Additional Notes

None.

2.2.3 Update Customer Wastage

2.2.3.1 Purpose

The Update Customer Wastage module allows modifications to recorded wastage details, ensuring data accuracy. It helps track Customer performance, adjust discrepancies, and maintain precise records. This improves cost control, transparency, and efficiency in jewellery production.

2.2.3.2 User Type

Registered Users, Admins.

2.2.3.3 Screen Layout

Same Create Customer Wastage Layout.

2.2.3.4 UI Elements

Same Create Customer Wastage Layout.

2.2.3.5 Functional Requirements

- **Initiate Update Process**
  - **Description:** The update process is initiated by clicking the Edit button in the Action column of the Wastage master.
  - **Functionality:**
    - **Edit Button Action:**
      - Loads the selected Wastage existing details (Group Category, Category, Purity, Style, Wastage, Making must not be empty) into the Customer wastage master form.
      - Pre-populates the form fields with the current values of the selected wastage record for editing.
  - **Expected Outcome:** The wastage master form is populated with the selected wastage's current data, ready for modification.

- **Modify Purity Details:**
  - **Description:** Allows users to modify one or more fields in the customer wastage record, such as Mapping Type, Setup Type, Assign Type, Wastage Percentage, Minimum Wastage, Maximum Wastage, Making Charges, and other relevant settings.
  - **Fields Available for Update:**
    - **Mapping Type:** Modify the mapping type to ensure correct customer allocation.
      - **Condition:** If a transaction is linked to a specific mapping type, it cannot be changed.
    - **Setup Type:** Update the setup type as needed.
    - **Assign Type:** Modify the assign type for better classification.
    - **Wastage Type:** Select from available wastage types (Purity Percentage, Tunch, Wastage).
    - **Wastage Percentage:** Adjust the wastage percentage (Numeric Input: 0% – 100%).
    - **Minimum Wastage:** Define the lower wastage limit.
    - **Maximum Wastage:** Set an upper cap for wastage.
    - **Making Charges:** Modify the making charges (Numeric Input).
    - **Enable Add-on Wastage:** Enable or disable additional wastage.
    - **Enable Credit Breakup:** Toggle credit breakup option.
    - **Enable Margin:** Allow margin calculations.
    - **Is Active:** Mark the record as Active or Inactive.
  - **Expected Outcome:** Users can update all editable fields before saving the record.

- **Form Validation (Update Mode)**
  - **Purpose:** Ensures that updated information meets validation requirements before submission.
    - **Validation Criteria:**
      - **Mandatory Fields:** (Mapping Type, Setup Type, Assign Type, Wastage Type, Wastage Percentage, Making Charges) for Customer Wastage must not be empty.
    - **Error Handling:** If validation fails, display specific error messages to guide the user.
      - Example Message:
        - "Mapping Type, Setup Type, Assign Type, Wastage Type, Wastage Percentage, Making Charges are required fields."
  - **Expected Outcome:** All required fields are validated, and any errors are shown to the user before submission.

- **Submit Updated Data**
  - **Description:** Saves the modified data to the database upon successful validation.
  - **Functionality:**
    - **Submit Button:**
      - Saves the updated Vendor Wastage master data to the database and refreshes the table to reflect changes.
      - Displays a success message to confirm the update (e.g., "Wastage Master details have been successfully updated").
  - **Expected Outcome:** The updated wastage is stored in the database, and the user receives confirmation of the successful update.

- **Cancel Update**
  - **Purpose:** Allows users to discard changes if they choose not to update the Wastage master record.
  - **Functionality:**
    - **Cancel Option:** Users can cancel the update operation by closing the form or clicking a "Previous" button.
    - **Expected Outcome:** The form closes without saving changes, leaving the original Wastage master record intact.
- **Confirmation Message**
  - **Purpose:** Notifies the user of the successful completion of the update operation.
  - **Functionality:**
    - **Display message:** upon a successful update (e.g., "Wastage Master have been successfully updated").
    - **Expected Outcome:** The confirmation message assures the user that the changes were saved.

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2.2.3.6 Data Requirements

None.

2.2.3.7 Non-Functional Requirements

None.

2.2.3.8 Configurations

None.

2.2.3.9 Flowchart

None.

2.2.3.10 Additional Notes

None.

2.2.4 Remove Customer Wastage

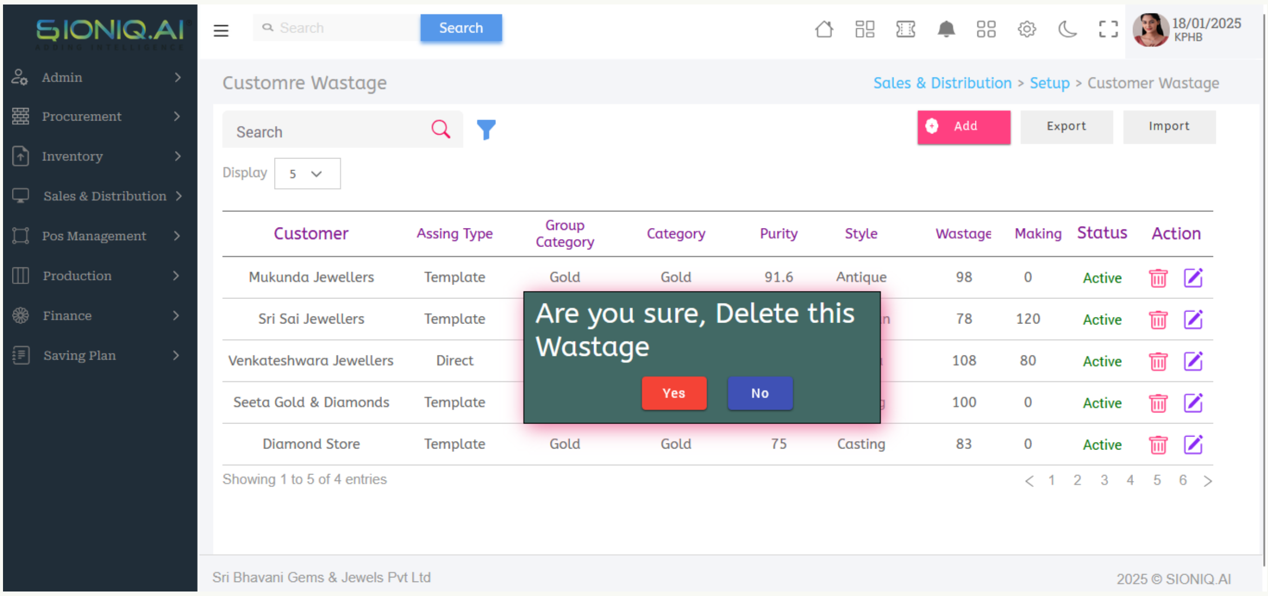
2.2.4.1 Purpose

The Remove Customer Wastage module allows the deletion of incorrect or obsolete wastage records to maintain data accuracy. It helps in managing customer records efficiently and ensuring reliable reporting. This improves transparency, compliance, and overall process efficiency.

2.2.4.2 User Type

Registered Users, Admins.

2.2.4.3 Screen Layout



2.2.4.4 UI Elements

None.

2.2.4.5 Functional Requirements

- **Access Control**
  - **Purpose**: Ensure that only authorized users can perform the delete operation for Customer Wastage.
  - **Functionality**:
    - **Delete Permission**:
      - The **Delete** button is only accessible to users with delete permissions configured in the system's user roles and permissions settings.
    - **Expected Outcome**: Unauthorized users cannot access or initiate the delete process.

- **Initiate Delete Action**
  - **Description**: The delete process begins when an authorized user clicks the Delete button in the Action column of the customer wastage table.
  - **Functionality**:
    - **Delete Button Action**:
      - Prompts the user with a delete confirmation message to prevent accidental deletion.
    - **Expected Outcome**: The system displays a confirmation prompt, and no action is taken unless the user confirms the deleted request.

- **Delete Confirmation Prompt**

- **Purpose**: To ensure the user intends to proceed with deletion and prevent accidental removal of data.
- **Functionality**:
  - **Confirmation Message**:
    - When the Delete button is clicked, the system displays a warning message:
      - "Are you sure you want to delete this Customer Wastage?"
  - **Options**:
    - **Yes**: Confirms the deletion and proceeds with removing the Customer Wastage record.
    - **No**: Cancels the delete action without making any changes.
  - **Expected Outcome**: The Customer Wastage record is deleted only when the user confirms by selecting Yes.

- **Delete Execution:**
  - **Description**: After confirmation, the system marks the Wastage master record as deleted in the database.
  - **Functionality**:
    - **Data Removal**:
      - Updates the selected Wastage record's status to "Status=0" in the database.
    - **Dependencies Check**:
      - Before deletion, the system checks for any dependencies (e.g., associated branches, inventory, or transactions).
      - **If dependencies exist**:
        - Displays a message: "Cannot delete Wastage as it has associated records."
        - Halts the delete process until dependencies are resolved.
    - **Expected Outcome**: The system removes the record only when no dependencies are found.

- **Success Message**
  - **Purpose**: Inform the user that the delete action was successfully completed.
  - **Functionality**:
    - **Display Message**:
      - Upon successful deletion, display a success message such as:
        - " Customer Wastage has been successfully deleted."
    - **Expected Outcome**: The user receives confirmation that the record was deleted.
- **Refresh Table View**
  - **Description**: Updates the Wastage Master table view to reflect the changes made by the deletion.
  - **Functionality**:
    - **Refresh Table**:
      - Automatically removes the deleted Customer Wastage record from the list in the table view.

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- **Pagination Update**:
  - Adjusts the pagination if necessary to ensure the remaining records are displayed correctly.
- **Expected Outcome**: The table reflects the updated state, with the deleted record no longer visible.

2.2.4.6 Data Requirements

None.

2.2.4.7 Non-Functional Requirements

None.

2.2.4.8 Configurations

None.

2.2.4.9 Flowchart

None.

2.2.4.10 Additional Notes

None.

2.3 Customer Stone Rate

2.3.1 Data View

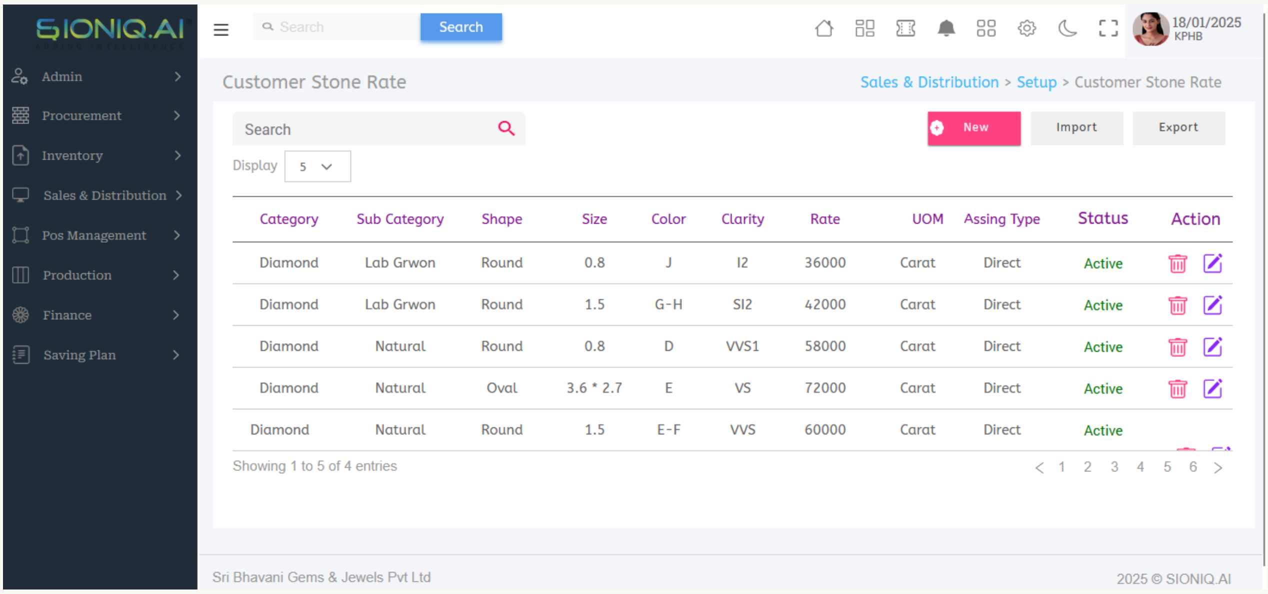
2.3.1.1 Purpose

The purpose of **Customer Stone Rates** is to manage and standardize stone pricing in customer transactions. It ensures accuracy, transparency, and consistency based on market trends and agreements. This helps optimize pricing efficiency while maintaining compliance with industry standards.

2.3.1.2 User Type

Registered Users, Admins.

2.3.1.3 Screen Layout



2.3.1.4 UI Elements

- **Search Option**
  - **Description**: A search bar located at the top of the data view section to filter the Customer Stone Rate records displayed in the table.
  - **Functionality**:
    - Enabled users to search by Category, Sub Category, Shape, Size, Colour, Clarity, Rate, UOM, Assing Type, Status, Action.
    - Dynamically updates the displayed table to show only results that match the search query.

- **Display Dropdown**
  - **Description**: A dropdown control to set the number of rows shown in the table at once.
  - **Options**: Common choices (e.g., 5, 10, 25, 50, 100 rows per page).
  - **Functionality**:
    - Allows users to control the number of Customer Stone Rate records displayed per page.
    - Updates the table view immediately based on the selected number of rows.

- **Buttons**
  - **New Button**
    - **Label**: "New"
    - **Functionality**: Opens the Customer Stone Rate form to add a New Customer Stone Rate record.
  - **Export Button**
    - **Label**: "Export" (or Icon button as specified)

- **Functionality**: Allows users to export the displayed Customer Stone Rate data in various file formats (Excel).
- **Export Options**: Exports all or filtered data based on the current table view and search filter.

- **Import Button**
  - **Label**: "Import" (or Icon button as specified)
  - **Functionality**: Redirects to the Import Form page, where users can upload Customer Stone Rate data.

- **Tabular View**
  - **Description**: The Tabular View provides a comprehensive and structured representation of all Customer Stone Rate details registered in the system. It enables users to view, manage, and perform actions on Stone Rates data efficiently.

  - **Columns**:
    - **Category**: Displays the type of stone (e.g., Diamond).
    - **Sub Category**: Specifies the classification of the stone (e.g., LAB GROWN, Natural).
    - **Shape**: Represents the shape of the stone (e.g., Round, Oval).
    - **Size**: Displays the size of the stone in carats (e.g., 0.8, 1.5, 3.6).
    - **Colour**: Indicates the colour grade of the stone (e.g., J, D, E-F, G-H).
    - **Clarity**: Specifies the clarity level of the stone (e.g., VS, VVS, VVS1, SI2, SI).
    - **Rate**: Displays the customers rate for the stone (e.g., 10,000; 20,000; 30,000)
    - **UOM (Unit of Measure):** Specifies the measurement unit (e.g., Carat, Gram).
    - **Assing Type**: Defines how the stone rate is assigned (e.g., Direct).

  - **Status Values**:
    - **Active**: If the checkbox is checked in the form.
    - **Inactive**: If the checkbox is unchecked in the form.

  - **Action**:
    - **Delete**: Deletes the selected Customer Stone Rate record (permission-based).
    - **Functionality**: Triggers a delete confirmation prompt before proceeding.
    - **Edit**: Allows modification of the Customer Stone Rate information (permission-based).
    - **Functionality**: Opens the Customer Stone Rate form populated with the selected Customer Stone Rate data for editing.

- **Paging for Table View**
  - **Description**: Includes pagination controls at the bottom of the table for navigating through multiple pages of Customer Stone Rate records.
  - **Functionality**:

- Displays navigation buttons (e.g., "Previous", "Next") to move between pages.
- Shows page numbers to allow users to jump directly to specific pages.
- Updates the displayed Customer Stone Rate records based on the selected page.

2.3.1.5 Functional Requirements

Refer to the above UI ELEMENTS section for specific functionalities associated with each element.

2.3.1.6 Data Requirements

- **Data Source**
  - The data displayed in the Customer Stone Rate Tabular View is sourced from the Customer Stone Rate Table.
  - Fields and Requirements:
    - **Category**: Displays the type of stone (e.g., Diamond).
    - **Sub Category**: Specifies the classification of the stone (e.g., LAB GROWN, Natural).
    - **Shape**: Represents the shape of the stone (e.g., Round, Oval).
    - **Size**: Displays the size of the stone in carats (e.g., 0.8, 1.5, 3.6).
    - **Colour**: Indicates the colour grade of the stone (e.g., J, D, E-F, G-H).
    - **Clarity**: Specifies the clarity level of the stone (e.g., VS, VVS, VVS1, SI2, SI).
    - **Rate**: Displays the Customers' rate for the stone (e.g., 10,000; 20,000; 30,000).
    - **UOM (Unit of Measure)**: Specifies the measurement unit (e.g., Carat, Gram).
    - **Assign Type**: Defines how the stone rate is assigned (e.g., Direct).
      - **Status**: Displays the current status of the Customer Stone Rate (e.g., Active or Inactive).
      - **Action**: Provides options to Edit or Delete the respective Customer Stone Rate record.
- **Usage**
  - The table data is used for operational decisions, navigation, and reporting. All fields are searchable and filterable based on the requirements.

2.3.1.7 Non-Functional Requirements

None.

2.3.1.8 Configurations

- **Functionality**:
    - **Permission Settings**: Controls the visibility and accessibility of buttons and actions based on user roles or permissions.
- **Available Permissions**:
    - **Add Customer Stone Rate Permission**: Grants access to the "Add " button.
    - **Export Permission**: Grants access to the Export button for exporting data.
    - **Import Permission**: Grants access to the Import button for importing data.
    - **Edit Permission**: Allows users to access the Edit button in the Action column to modify records.
    - **Delete Permission**: Allows users to access the Delete button in the Action column to delete records.
- **Permission Assignment**: Admins or authorized users can assign permissions to individual users or user roles.

2.3.1.9 Flowchart

None.

2.3.1.10 Additional Notes

None.

2.3.2 Create Customer Stone Rate

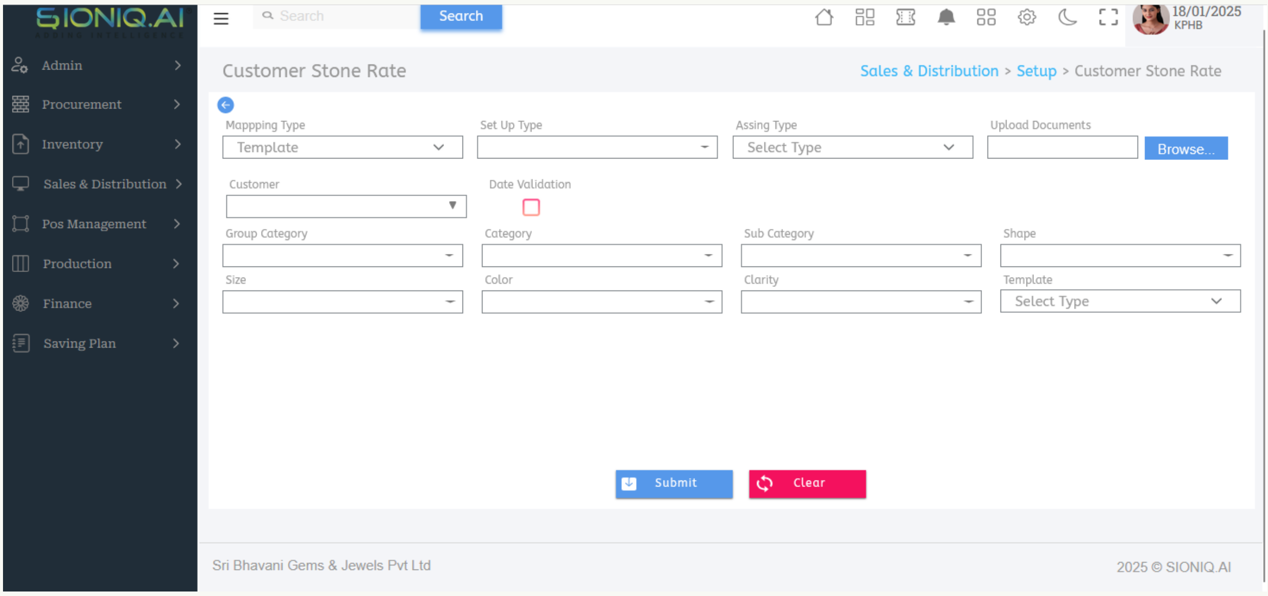
2.3.2.1 Purpose

The purpose of **Create Customer Stone Rate** is to define and record stone prices for customer transactions in the jewellery industry. It ensures accurate pricing, transparency, and consistency based on market trends and agreements. This process helps in optimizing rate management while maintaining compliance with industry standards.

2.3.2.2 User Type

Registered Users, Admins.

2.3.2.3 Screen Layout



2.3.2.4 UI Elements

- **Action on Add Button Click**
  - **Function:** When the Add button is clicked on Customer Stone Rate, the user will be directed to a new page that provides an interface to create a new Customer Stone Rate master record.
- **Mapping Type**
  - **Type**: Dropdown
  - **Label**: Mapping Type
  - **Editable**: Yes
  - **Description**: Select the mapping type to define the relationship between customer and stone rate rules.
  - **Options**:
    - Direct
    - Template
    - Customer to Customer Mapping
    - File Upload
  - **Validation**: Required field

UI Elements for "Direct" "Template" and "File Upload" selection

- **Set Up Type**
  - **Type**: Multi Selection Dropdown
  - **Label**: Setup Type
  - **Editable**: Yes
  - **Description**: Choose how the customer Stone rate rules will be set up.
  - **Options**: Import Stone
  - **Source**: Stone Master
  - **Validation**: Required field
- **Assign Type**
  - **Type**: Dropdown
  - **Label**: Assign Type
  - **Editable**: Yes
  - **Description**: Define how the stone rate is assigned to the customer.
  - **Options**:
    - Classification
    - Customer
    - Customer – Cost Centre
  - **Validation**: Required field
- **Upload File**
  - **Type:** File Upload
  - **Label:** Upload Documents
  - **Editable:** Yes
  - **Description:** Upload a file containing customer stone rate.
  - **Validation:** Required field (Only CSV, XLSX, or other supported formats).

UI Elements for "Customer to Customer Mapping" selection

- **Retrieve from Customer**
  - **Type**: Dropdown
  - **Label**: Retrieve from Customer
  - **Editable**: Yes
  - **Description**: Select the customer whose assigned stone rate rules need to be retrieved.
  - **Options**: Import Customer's
  - **Source**: Customer Stone Rate Table
  - **Validation**: Required field
- **Sync to Customer**
  - **Type**: Dropdown
  - **Label**: Sync to Customer
  - **Editable**: Yes
  - **Description**: Select the Customer to whom stone rate rules will be synced.
  - **Options**: Import Customer's
  - **Validation**: Required field
  - **Behaviour**: Displays only customers who have not been assigned stone rate rules.
- **Upload File**
  - **Type:** File Upload
  - **Label:** Upload Documents
  - **Editable:** Yes
  - **Description:** Upload a file containing customer stone rate.
  - **Validation:** Required field (Only CSV, XLSX, or other supported formats).

Conditional UI Elements Based on "Assign Type" selection

- **Classification**
  - **Type**: Dropdown
  - **Label**: Classification

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- **Editable**: Yes
- **Description**: Select the classification for Customer stone rates assignment.
- **Options**: Import Classification
- **Source**: Customer Classification Table
- **Validation**: Required field
- **Behaviour**: Displays when "Assign Type' is set to "Classification".

- **Customer**
  - **Type**: Dropdown
  - **Label**: Customer
  - **Editable**: Yes
  - **Description**: Select the Customer for stone rates assignment
  - **Options**: Import Customer
  - **Source**: Customer Table
  - **Validation**: Required field
  - **Behaviour**: Displays when "Assign Type" is set to "Customer" or "Customer – Cost Centre".
- **Cost Centre**
  - **Type:** Dropdown
  - **Label:** Cost Centre
  - **Editable:** Yes
  - **Description:** Select the cost centre for customer stone rates assignment.
  - **Options:** Import Customer Cost Centre
  - Source: Customer Table
  - **Validation:** Required field
  - **Behaviour:** Displays when "Assign Type" is set to "Customer –Cost Centre". Filter based on the selected customer.

Date Validation UI Elements

- **Date Validation**

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- **Type**: Checkbox
- **Label**: Date validation
- **Editable**: Yes
- **Description**: Enable validation for assigned stone rates based on a date range.
- **Validation**: Optional
- **Behavior**:
    - **Checked**: Displays "From Date" and "To Date" fields.
    - **Unchecked**: Hides "From Date" and "To Date" fields.

- **From Date**
    - **Type**: Date Input
    - **Label**: From Date
    - **Editable**: Yes
    - **Description**: Specifies the starting date for assigned stone rates validation.
    - **Validation**: Required If "Date Validation" checkbox is checked.

- **To Date**
    - **Type:** Date Input
    - **Label:** To Date
    - **Editable:** Yes
    - **Description:** Specifies the ending date for assigned stone rates validation.
    - **Validation:** Required if "Date Validation" checkbox is Checked.

Group Category, Category and Sub Category Selection UI Elements

- **Group Category**
    - **Type**: Multi - Selection Dropdown
    - **Label**: Group Category
    - **Editable**: Yes
    - **Description**: Select the group category for customer stone rates assignment.
    - **Options**: Import Group Category
    - **Source**: Group Category Table
    - **Validation**: Required field

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- **Category**
  - **Type**: Multi - Selection Dropdown
  - **Label**: Category
  - **Editable**: Yes
  - **Description**: Select the category for customer stone rates assignment.
  - **Options**: Import Category
  - **Source**: Category Table
  - **Validation**: Required field
- **Sub Category**
  - **Type**: Multi - Selection Dropdown
  - **Label**: Sub Category
  - **Editable**: Yes
  - **Description**: Select the sub category for customer stone rates assignment.
  - **Options**: Import Sub Category
  - **Source**: Sub Category Table
  - **Validation**: Required field

Conditional UI Elements Based on "Setup Type" Selection

- **Category**
  - **Type:** Multi - Selection Dropdown
  - **Label:** Category
  - **Editable:** Yes
  - **Description:** Select the category for customer stone rates assignment.
  - **Options:** Import Category
  - **Source:** Category Table
  - **Validation:** Required field
  - **Behavior**:
    - Displays when "Setup Type" is set to "Category" or any dynamic category.
    - Filters based on the selected Group Category.

- **Sub Category**
  - **Type:** Multi - Selection Dropdown
  - **Label:** Category
  - **Editable:** Yes
  - **Description:** Select the category for customer stone rates assignment.
  - **Options:** Import Sub Category
  - **Source:** Sub Category Table
  - **Validation:** Required field
  - **Behavior**:
    - Displays when "Setup Type" is set to "Sub Category" or any dynamic category.
    - Filters based on the selected Group Category.

- **Dynamic Categories**
  - **Type:** Multi - Selection Dropdown
  - **Label:** Dynamic Category Alias Name
  - **Editable:** Yes
  - **Description:** Select the dynamic category alias for customer stone rates assignment.
  - **Options:** Import Dynamic Category
  - **Source:** Dynamic Category Table
  - **Validation:** Required field
  - **Behavior**:
    - Displays when "Setup Type" is set to "Dynamic Category".
    - Filters based on the selected Group Category and Category.

Direct Selection UI Elements

- **Fixed on Barcode**
  - **Type:** Checkbox
  - **Label:** Fixed on Barcode
  - **Editable:** Yes
  - **Description:** If Checked wastage entry fields will be hidden and wastage will be entered at the time of barcoding.

- **Validation:** Optional
- **Behaviour**:
  - **Checked**: Hides wastage and making fields, wastage and making will be enter at barcoding stage
  - **Unchecked:** Displays wastage and making fields for manual entry.

- **Enable Margin**
  - **Type:** Checkbox
  - **Label:** Enable Margin
  - **Editable:** Yes
  - **Description:** If Checked enables "Margin Percentage".
  - **Validation:** Optional
  - **Behaviour**:
    - **Checked**: Displays "Margin Percentage".
    - **Unchecked:** Hides "Margin Percentage".

- **Margin Percentage**
  - **Type**: Numeric Input
  - **Label**: Margin Percentage
  - **Editable**: Yes
  - **Description**: Ensures stone rates cost is not billed below the set margin, protecting profitability.
  - **Validation**: Required If "Enable Margin" checkbox is checked.

- **Uom**
  - **Type**: Dropdown
  - **Label**: Uom
  - **Editable**: Yes
  - **Description**: Select the UOM. The chosen Uom will determine how the rate for the stone is calculated.
  - **Options**:
    - Gram
    - Carat
    - Cent
    - Pcs
  - **Validation**: Required field

- **Weight Less**
  - **Type**: Checkbox
  - **Label**: Weight Less
  - **Editable**: Yes
  - **Description**: If we check the checkbox the stone weight will not less from gross weight.
  - **Validation**: Optional.
  - **Behaviour**:
    - **Checked**: Stone weight will less from gross weight.
    - **Unchecked:** Stone weight will not less from gross weight.
- **Customer Return %**
  - **Type**: Numeric Input
  - **Label**: Customer Return %
  - **Editable**: Yes
  - **Description**: Enter the Return Stone Rate percentage for calculation.
  - **Validation**: Required field, accepts only numerics.
- **Customer Return Stone Rate**
  - **Type**: Numeric Input
  - **Label**: Customer Return Stone Rate
  - **Editable**: Yes
  - **Description**: Enter the Return Stone Rate value for calculation.
  - **Validation**: Required field, accepts only numerics.
- **Rate**
  - **Type:** Numeric Input
  - **Label:** Making Charges
  - **Editable:** Yes
  - **Description:** Enter the Customer Stone rate value for calculation
  - **Validation:** Required field, accepts only numerics.

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Template Selection UI Elements

- **Template**
  - **Type**: Dropdown
  - **Label**: Template
  - **Editable**: Yes
  - **Description**: Select the customer stone rates template for assignment.
  - **Options**: Import stone rate Templates
  - **Source**: Procurement Template Table
  - **Validation**: Required field

File Upload Selection UI Elements

- **Sample Download**
  - **Type**: Button/Link
  - **Label**: Sample Download
  - **Description**: Allows the user to download a sample file in the required format.

- **Upload File**
  - **Type**: File input
  - **Label**: Upload File
  - **Editable**: Yes
  - **Button**: Browse
  - **Validation**: Required field (Only CSV, XLSX, or other supported formats).
  - **Description**: Allows the user to upload customer stone rates file.

2.3.2.5 Functional Requirements

- **Actions**
  - **Submit Button Click**
    - **Action**: The form submission is triggered when the user clicks the Submit button, provided all required fields (Category, Sub Category, Shape, Size, Colour, Clarity, Rate, UOM, Assing Type, Status, Action) are populated with valid values.
    - **Outcome**:

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- **Create Operation**: If it is a new entry, the system saves the new customer stone rate to the database.
- **Update Operation**: If editing an existing entry, the system updates the existing customer stone rate record in the database.

○ **Mandatory Fields**

- **Fields**: Category, Sub Category, Shape, Size, Colour, Clarity, Rate, UOM, Assing Type, Status, Action are mandatory fields that must be completed.
- **Behaviour**:
  - Users are required to enter valid values for each of the mandatory fields.
  - If any mandatory field is left blank, the form submission will be blocked, and an error message will be displayed indicating the missing fields.

- **Conditional Validation**
  - **Field Format Validation**
    - **Category**: The field must contain a Category (alphabets only, max 50 chars).
    - **Sub Category**: The field must contain a Sub Category (alphabets & spaces only, max 50 chars).
    - **Shape**: The field must contain a Shape (alphabets only, max 30 chars).
    - **Size**: The field must contain a Size (numeric, supports decimals, e.g., 0.8, 1.5, 3.6 * 2.7).
    - **Colour**: The field must contain a Color (alphanumeric/range, e.g., D, G-H, E-F, max 10 chars).
    - **Clarity**: The field must contain Clarity (predefined values, e.g., VVS1, SI2, I1, max 10 chars).
    - **Rate**: This field accepts only numeric values (no negative values, max 7 digits).
    - **Uom**: The field must contain a UOM (predefined values, e.g., Carat, Gram, Piece).
    - **Assing Type**: The field must contain an Assign Type (dropdown, Direct/Indirect).
    - **Status:** The field must contain a Status (predefined values, Active/Inactive).
    - **Action**: The field must contain an Action (controlled via edit/delete buttons, no manual input).

○ **Error Messages**

- **Submit Attempt with Missing Values**
  - **Condition**: This condition occurs if one or more required fields are left empty when the user clicks the Submit button.
  - **Behaviour**: The system will display specific error messages indicating which fields are missing values.
  - **Message Examples**:
    - "Category is required" if the Category dropdown field is empty.
    - "Sub Category is required" if the Sub Category dropdown field is empty.
    - "Shape is required" if the Stone Sub Category dropdown field is empty.
    - "Size is required" if the size dropdown field is empty.
    - "Colour is required" if the colour dropdown field is empty.
    - "Clarity is required" if the Clarity dropdown field is empty.
    - "Rate is required" if the Rate dropdown field is empty.
    - "UOM is required" if the UOM dropdown field is empty.
    - "Assing Type is required" Assing dropdown field is empty.

- **Behaviour**
  - **Successful Submission**
    - If all required fields are correctly filled in, the form data will be saved to the database, and a confirmation message, such as "Record saved successfully," will be displayed to the user.
  - **Form Reset**
    - Clicking the **Clear** button will reset all form fields to their default values after the user confirms the action.
  - **Navigation**
    - Clicking the **Previous** button will discard any unsaved changes and navigate the user back to the vendor stone rate Table View.

2.3.2.6 Data Requirements

- **Group Category**
  - **Group Category Name** – Main classification of the stone (e.g., Diamond, Color Stone, Miscellaneous).

- **Group Category Code** – Unique identifier for the group category.

- **Category**
  - **Category Name** – Specific type within the group category (e.g., White Diamond, Blue Sapphire).
  - **Category Code** – Unique identifier for the category.
- **Sub-Category**
  - **Sub-Category Name** – Further classification within the category (e.g., Natural Diamond, Lab-Grown Diamond).
  - **Sub-Category Code** – Unique identifier for the sub-category.
- **Shape**
  - **Shape Name** – The cut or shape of the stone (e.g., Round, Oval, Princess, Pear).
  - **Shape Code** – Unique identifier for the shape.
- **Size**
  - **Size in mm** – Measurement of the stone in millimetres.
  - **Size in Carats** – Weight of the stone in carats.
  - **Size Code** – Unique identifier for the size.
- **Colour**
  - **Colour Name** – Colour of the stone (e.g., D, E, F for diamonds or Red, Green, Blue for coloured stones).
  - **Colour Code** – Unique identifier for the colour classification.
- **Clarity**
  - **Clarity Grade** – Quality of the stone in terms of inclusions (e.g., IF, VVS1, VVS2, VS1, VS2, SI1, SI2).
  - **Clarity Code** – Unique identifier for the clarity classification.
- **Rate**
  - **Rate per Carat** – Price of the stone per carat.
  - **Discount Percentage** – Any applicable discount.
  - **Final Rate** – Rate after discount application.
- **UOM (Unit of Measurement)**
  - **UOM Type** – Unit used to measure the stone (e.g., Carat, Gram, Piece).
  - **UOM Code** – Unique identifier for the UOM.
- **Assign Type**
  - **Assign Type** – Defines how the vendor stone rate is assigned (e.g., Vendor-wise, Category-wise, Quality-wise).

2.3.2.7 Non-Functional Requirements

None.

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2.3.2.8 Configurations

None.

2.3.2.9 Flowchart

None.

2.3.2.10 Additional Notes

None.

2.3.3 Update Customer Stone Rate

2.3.3.1 Purpose

The purpose of Update Customer Stone Rate is to modify and manage existing stone prices in customer transactions. It ensures accurate pricing, reflects market changes, and maintains consistency. This process helps prevent discrepancies, optimize rate management, and ensure compliance with industry standards.

2.3.3.2 User Type

Registered Users, Admins.

2.3.3.3 Screen Layout

Same Create Customer Stone Rate Layout.

2.3.3.4 UI Elements

Same Create Customer Stone Rate Layout.

2.3.3.5 Functional Requirements

- **Initiate Update Process**
  - **Description:** The update process is initiated by clicking the Edit button in the Action column of the Customer Stone Rate master.
  - **Functionality:**
    - **Edit Button Action:**
      - Loads the selected Stone Rate existing details (Stone Group Category, Stone Category, Sub Category, Shape, Size, Colour, Clarity, Template must not be empty) into the Customer Stone Rate master form.
      - Pre-populates the form fields with the current values of the selected Customer Stone Rate record for editing.

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- **Expected Outcome:** The customer stone rate master form is populated with the selected records current data, ready for modification.

- **Modify Customer Stone Rate Details:**
  - **Description:** Allows users to modify one or more fields in the Customer Stone Rate record, such as Mapping Type, Setup Type, Assign Type, stone Rate, and other relevant settings.
  - **Fields Available for Update:**
    - **Mapping Type:** Modify the mapping type for correct Customer allocation.
      - Condition: If a transaction is linked to a specific mapping type, it cannot be changed.
    - **Setup:** Update the setup type as required.
    - **Assign Type:** Modify the assign type for better classification.
    - **Upload Document:** Upload relevant supporting documents for customer stone rates.
    - **Stone Group Category:** Select the appropriate stone group category.
    - **Stone Category:** Choose the stone category applicable to the customer.
    - **Sub Category:** Update or modify the stone sub-category.
    - **Shape:** Modify the shape of the stone for customer-specific pricing.
    - **Size:** Update the size of the stone in the Customer rate record.
    - **Colour:** Modify the colour of the stone for customer -specific rate settings.
    - **Clarity:** Update the clarity of the stone for customer allocation.
  - **Expected Outcome:** Users can update all editable fields before saving the record.

- **Form Validation (Update Mode)**
  - **Purpose**: Ensures that updated information meets validation requirements before submission.
    - **Validation Criteria:**
      - **Mandatory Fields:** (Mapping Type, Setup, Assign Type, Upload Document, Stone Group Category, Stone Category, Sub Category, Shape, Size, Colour, Clarity, Template) must not be empty.
    - **Error Handling:** If validation fails, display specific error messages to guide the user.
      - Example Message:
        - "Mapping Type, Setup, Assign Type, Upload Document, Stone Group Category, Stone Category, Sub Category, Shape, Size, Colour, Clarity, and Template are required fields."

- **Expected Outcome**: All required fields are validated, and any errors are displayed before submission.

- **Submit Updated Data**
  - **Description:** Saves the modified data to the database upon successful validation.
  - **Functionality:**
    - **Submit Button:**
      - Saves the updated Customer Stone Rate master data to the database
      - Refreshes the table to reflect the changes.
      - Displays a success message confirming the update.
  - **Expected Outcome**: The updated Customer Stone Rate details are stored in the database, and the user receives a confirmation message:

- **Cancel Update**
  - **Purpose:** Allows users to discard changes if they choose not to update the Customer Stone Rate master record.
  - **Functionality:**
    - **Cancel Option:** Users can cancel the update operation by closing the form or clicking a "Previous" button.
    - **Expected Outcome:** The form closes without saving changes, leaving the original Customer Stone Rate master record unchanged.

- **Confirmation Message**
  - **Purpose:** Notifies the user of the successful completion of the update operation.
  - **Functionality:**
    - **Display message:** upon a successful update (e.g., "Customer Stone Rate have been successfully updated").
    - **Expected Outcome:** The confirmation message assures the user that the changes were saved.

2.3.3.6 Data Requirements

None.

2.3.3.7 Non-Functional Requirements

None.

2.3.3.8 Configurations

None.

2.3.3.9 Flowchart

None.

2.3.3.10 Additional Notes

None.

2.3.4 Remove Vendor Stone Rate

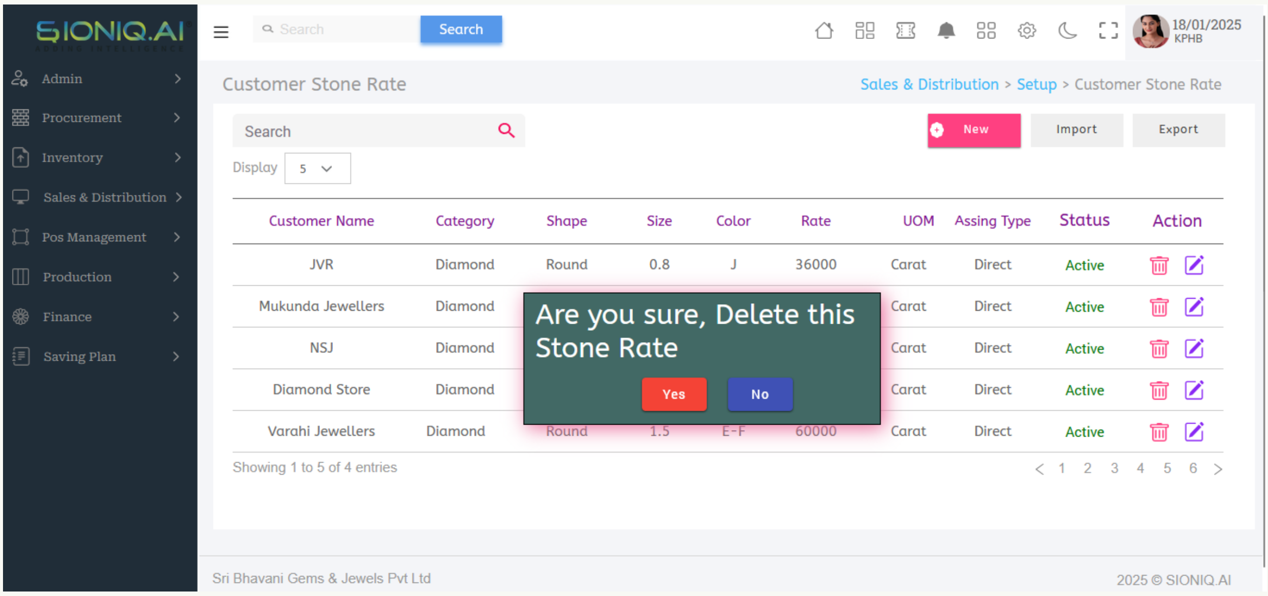
2.3.4.1 Purpose

The purpose of removing a Vendor Stone Rate is to delete outdated or incorrect vendor-specific stone pricing details. This ensures data accuracy by eliminating unnecessary or invalid records. The removal process updates the system while maintaining consistency in vendor rate management.

2.3.4.2 User Type

Registered Users, Admins.

2.3.4.3 Screen Layout



2.3.4.4 UI Elements

None.

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2.3.4.5 Functional Requirements

- **Access Control**
  - **Purpose**: Ensure that only authorized users can perform the delete operation for Customer Stone Rate.
  - **Functionality**:
    - **Delete Permission**:
      - The **Delete** button is only accessible to users with delete permissions configured in the system's user roles and permissions settings.
    - **Expected Outcome**: Unauthorized users cannot access or initiate the delete process.
- **Initiate Delete Action**
  - **Description**: The delete process begins when an authorized user clicks the Delete button in the Action column of the customer stone rate table.
  - **Functionality**:
    - **Delete Button Action**:
      - Prompts the user with a delete confirmation message to prevent accidental deletion.
    - **Expected Outcome**: The system displays a confirmation prompt, and no action is taken unless the user confirms the delete request.
- **Delete Confirmation Prompt**
  - **Purpose**: To ensure the user intends to proceed with deletion and prevent accidental removal of data.
  - **Functionality**:
    - **Confirmation Message**:
      - When the Delete button is clicked, the system displays a warning message:
        - "Are you sure you want to delete this Customer Stone Rate?"
    - **Options**:
      - **Yes**: Confirms the deletion and proceeds with removing the Customer Stone Rate record.
      - **No**: Cancels the delete action without making any changes.
    - **Expected Outcome**: The Customer Stone Rate record is deleted only when the user confirms by selecting Yes.

- **Delete Execution:**
  - **Description**: After confirmation, the system marks the Stone Rate master record as deleted in the database.
  - **Functionality**:
    - **Data Removal**:
      - Updates the selected Stone Rate record's status to "Status=0" in the database.
    - **Dependencies Check**:
      - Before deletion, the system checks for any dependencies (e.g., associated branches, inventory, or transactions).
      - **If dependencies exist**:
        - Displays a message: "Cannot delete Stone Rate as it has associated records."
        - Halts the delete process until dependencies are resolved.
    - **Expected Outcome**: The system removes the record only when no dependencies are found.

- **Success Message**
  - **Purpose**: Inform the user that the delete action was successfully completed.
  - **Functionality**:
    - **Display Message**:
      - Upon successful deletion, display a success message such as:
        - " Customer Stone Rate has been successfully deleted."
    - **Expected Outcome**: The user receives confirmation that the record was deleted.

- **Refresh Table View**
  - **Description**: Updates the Stone Rate Master table view to reflect the changes made by the deletion.
  - **Functionality**:
    - **Refresh Table**:
      - Automatically removes the deleted Customer Stone Rate record from the list in the table view.
    - **Pagination Update**:
      - Adjusts the pagination if necessary to ensure the remaining records are displayed correctly.
  - **Expected Outcome**: The table reflects the updated state, with the deleted record no longer visible.

2.3.4.6 Data Requirements

None.

2.3.4.7 Non-Functional Requirements

None.

2.3.4.8 Configurations

None.

2.3.4.9 Flowchart

None.

2.3.4.10 Additional Notes

None.

2.4 Alloy

The Alloy Form in the Jewellery ERP system is designed to streamline the entry and management of Alloy’s data. This form allows users to create, edit, delete, and view details related to various Alloy’s involved in the jewellery supply chain. By centralizing this information, the Alloy Form ensures consistency in business data utilized across multiple modules, such as Alloy Inward, Production, and inventory control. This functionality supports efficient operations and enhances compliance with industry standards within the ERP system.

2.4.1 Data View

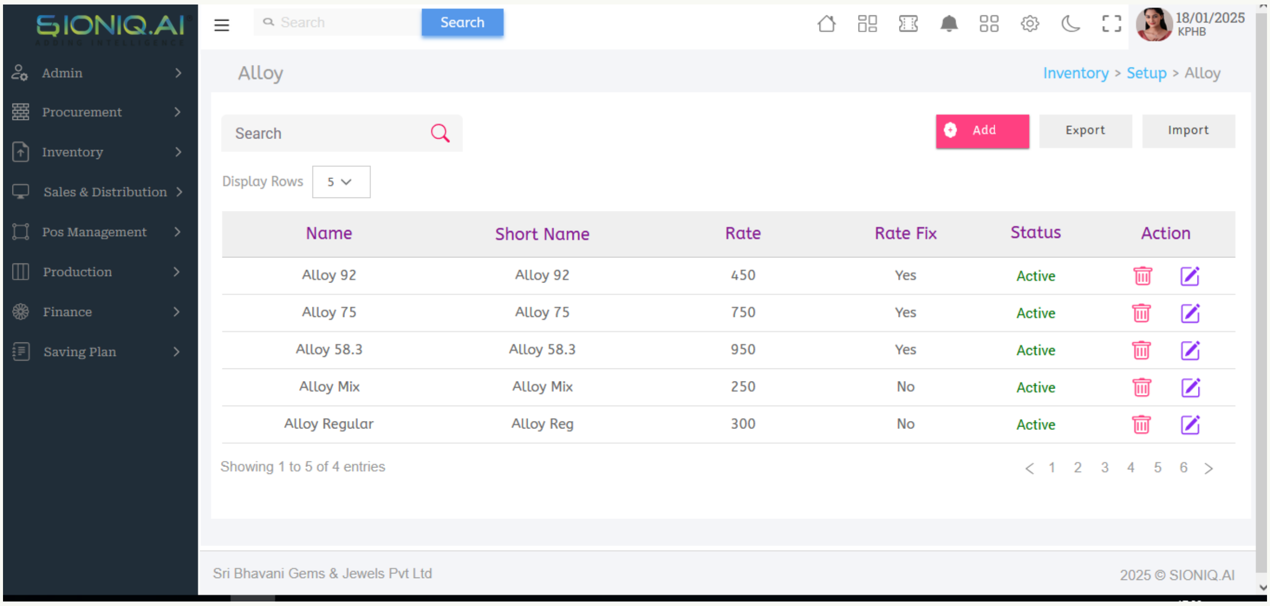
2.4.1.1 Purpose

This section displays an overview of all alloy’s currently registered in the system. Users can view detailed information for each alloy, allowing for quick access to all existing records, supporting informed decision-making and streamlined navigation.

2.4.1.2 User Type

Registered Users, Admins.

2.4.1.3 Screen Layout



2.4.1.4 UI Elements

- **Search Option**
  - **Description:** A search bar located at the top of the data view section to filter alloy's displayed in the table.
  - **Functionality:**
    - Enables users to search by Alloy Name, Short Name, Rate or Status.
    - Dynamically updates the displayed table to show only results that match the search query.
- **Display Dropdown**
  - **Description**: A dropdown control to set the number of rows shown in the table at once.
  - **Options**: Common choices (e.g., 5, 10, 25, 50, 100 rows per page).
  - **Functionality**:
    - Allows users to control the number of Alloy records displayed per page.
    - Updates the table view immediately based on the selected number of rows.
- **Buttons**
  - **Add Alloy Button**
    - **Label**: "New"
    - **Functionality**: Opens the Alloy Creation Form to add a new Alloy record.
  - **Export Button**
    - **Label**: "Export" (or Icon button as specified)
    - **Functionality**: Allows users to export the displayed Alloy data in various file formats (Excel).
    - **Export Options**:
      - Exports all or filtered data based on the current table view and search filter.
  - **Import Button**
    - **Label**: "Import" (or Icon button as specified)

- **Functionality**:
  - Redirects to the Import Form page, where users can upload Alloy data.

- **Tabular View**
  - **Description**: Displays a structured view of all created alloy's.
  - **Columns**:
    - **Alloy Name**: Displays the full name of each Alloy.
    - **Short Name**: Shows the abbreviated name for each Alloy.
    - **Rate**: Displays the rate of the alloy per gram.
    - **Rate fix**: Displays the rate was editable or not for each Alloy.
    - **Is Active**: Displays the active status of each Alloy.
      - **Status**:
        - "**Active**" if the checkbox is checked in the form.
        - "**Inactive**" if the checkbox is unchecked in the form.
    - **Action**:
      - **Delete**: Deletes the selected Alloy record (permission-based).
        - **Functionality**: Triggers a delete confirmation prompt (see "Delete Confirmation" in functional requirements).
      - **Edit**: Allows modification of a Alloy's information (permission-based).
        - **Functionality**: Loads the selected Alloy's data into the Alloy Creation Form for editing.
- **Paging for Table View**
  - **Description:** Includes pagination controls at the bottom of the table for navigating through multiple pages of Alloy records.
  - **Functionality:**
    - Displays navigation buttons (e.g., "Previous", "Next") to move between pages.
    - Shows page numbers to allow users to jump directly to specific pages.
    - Updates the displayed Alloy records based on the selected page.

2.4.1.5 Functional Requirements

Refer to the above **UI Elements** section for specific functionalities associated with each element.

2.4.1.6 Data Requirements

- **Alloy Data**
  - **Source:** Alloy Creation Table
  - **Fields Required:**
    - **Alloy Name**: The full name of the Alloy.
    - **Alloy Short Name**: An abbreviated name for the Alloy.
    - **Rate:** The rate of the Alloy.
    - **Rate Fix:** Yes, indicate Alloy rate is editable (Boolean: Yes or No).

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- **Is Active**: Indicates if the Alloy is currently active (Boolean: active or inactive).
- **Usage**: Main data for display in the table, searchable and filterable.

2.4.1.7 Non-Functional Requirements

None.

2.4.1.8 Configurations

- **Functionality**:
  - **Permission Settings**: Controls the visibility and accessibility of buttons and actions based on user roles or permissions.
- **Available Permissions**:
  - **Add Alloy Permission**: Grants access to the "Add Alloy" button.
  - **Export Permission**: Grants access to the Export button for exporting data.
  - **Import Permission**: Grants access to the Import button for importing data.
  - **Edit Permission**: Allows users to access the Edit button in the Action column to modify records.
  - **Delete Permission**: Allows users to access the Delete button in the Action column to delete records.
- **Permission Assignment**: Admins or authorized users can assign permissions to individual users or user roles.

2.4.1.9 Flowchart

None.

2.4.1.10 Additional Notes

None.

2.4.2 Create Alloy

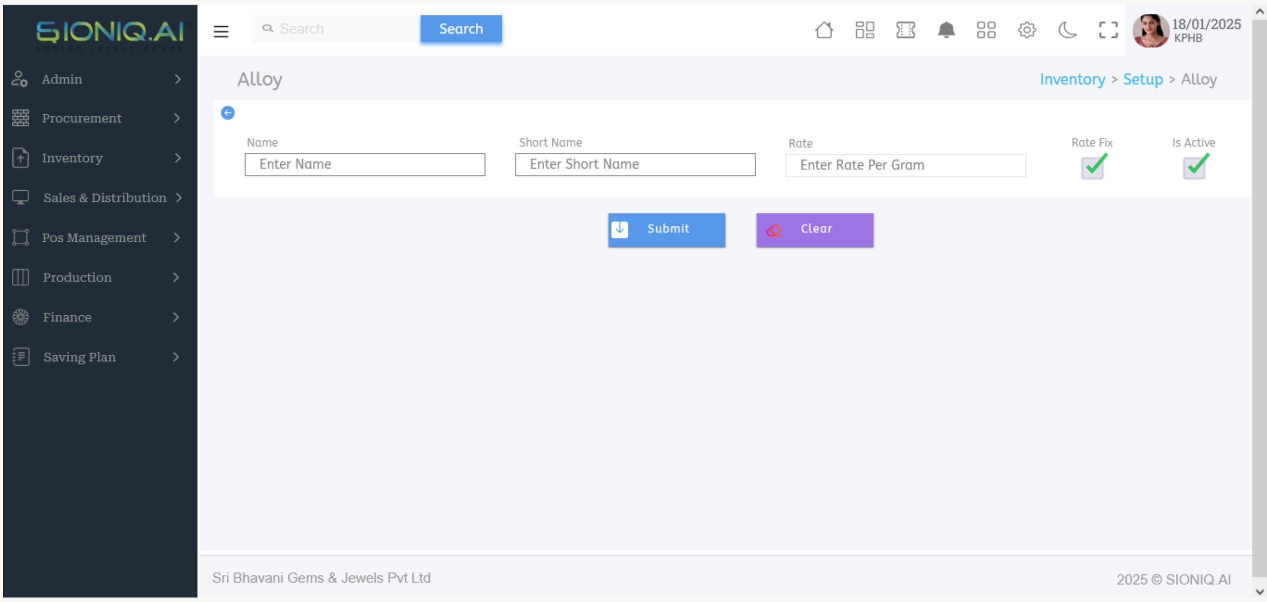
2.4.2.1 Purpose

This section allows users to add a new Alloy to the ERP system. Users can enter key information such as the Alloy name, short name, register, Rate logo. This process ensures consistent data entry for operational and reporting purposes.

2.4.2.2 User Type

Registered Users, Admins.

2.4.2.3 Screen Layout



2.4.2.4 UI Elements

- **Alloy Name**
  - **Type:** Text Input (Text Editor)
  - **Label:** "Name"
  - **Editable:** Yes
  - **Description:** Allows users to enter the full name of the Alloy. This input will be used to identify the Alloy within the system.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 50 characters
    - **Allowed Characters:** Letters, spaces, and special characters (e.g., apostrophes, hyphens)
- **Alloy Short Name**
  - **Type**: Text Input (Text Editor)
  - **Label**: "Short Name"
  - **Editable**: Yes
  - **Description**: Allows users to enter an abbreviated name for the Alloy, typically in 2-5 characters (e.g., "NSJ" for the Nathu and Son's Jewellers).
  - **Validation**:
    - Required: Yes
    - Character Limit: 5 characters
    - Allowed Characters: letters only (e.g., "NSJ")
- **Rate**
  - **Type**: Text Input (Text Editor)

- **Label**: "Rate"
- **Editable**: Yes
- **Description**: Field to enter the Rate of the Alloy.
- **Validation**:
    - Required: Yes
    - Character Limit: 50 characters.
    - Allowed Characters: Numerics (Decimals Allowed).
    - Size Limit: Maximum 5 MB.

- **Rate Fix**
    - **Type**: Checkbox
    - **Label**: "Is Active"
    - **Editable**: Yes
    - **Default Value**: Checked (True)
    - **Behavior**:
    - **Checked**: The Alloy is marked as active and visible in the system (e.g., dropdowns, lists).
    - **Unchecked**: The Alloy is inactive but remains in the database.
- **Is Active**
    - **Type**: Checkbox
    - **Label**: "Is Active"
    - **Editable**: Yes
    - **Default Value**: Checked (True)
    - **Behavior**:
    - **Checked**: The Alloy is marked as active and visible in the system (e.g., dropdowns, lists).
    - **Unchecked**: The Alloy is inactive but remains in the database.
- **Submit Button**
    - **Type**: Button
    - **Label**: "Submit"
    - **Editable**: No (Standard Button)
    - **Description**: Submits the filled form data to the database.
    - **Validation**:

- **Required Fields**: Ensures all mandatory fields are filled and validated.

- **Behavior**:
  - **Successful Submission**: Form data is saved to the database.
  - **Failed Validation**: Displays an error message highlighting the fields requiring correction.

- **Clear Button**
  - **Type**: Button
  - **Label**: "Clear"
  - **Editable**: No (Standard Button)
  - **Description**: Resets or clears all form fields, enabling a fresh start.
  - **Validation**: None required.
  - **Behavior**:
    - **Reset Form Fields**: Clears all data entered in the form fields.
    - **Confirmation Prompt**: Prompts the user to confirm the action to prevent accidental data loss.

- **Previous Button**
  - **Type**: Button
  - **Label**: "Previous Icon"
  - **Editable**: No (Standard Button)
  - **Description**: Closes the Alloy Creation Form and returns the user to the main Alloy table view, discarding unsaved changes.
  - **Validation**: None required.

2.4.2.5 Functional Requirements

- **Actions**
  - **Submit Button Click**
    - **Action**: Triggers form submission if all required fields (Name, Short Name and rate) contain valid values.
    - **Outcome**:
      - **Create Operation**: If it's a new entry, saves the new Alloy information.
- **Validation**
  - **Mandatory Fields**

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- **Fields:** Name, Short Name and Rate are required fields.
- **behaviour:**
  - Users must enter values in each mandatory input field.
  - If any mandatory field is left empty, the form submission is blocked, and an error message is displayed (details in "Error Messages" section).

- **Error Messages**
  - **Submit Attempt with Missing Values**
    - **Condition:** If one or more required fields are missing a value when the user clicks Submit.
    - **behaviour:** The system displays a specific error message indicating which field(s) are missing values.
    - **Message Examples:**
      - "Name is required" if only the Alloy Name field is empty.
      - "Short Name is required" if only the Alloy Short Name field is empty.

2.4.2.6 Data Requirements

None.

2.4.2.7 Non-Functional Requirements

None.

2.4.2.8 Configurations

None.

2.4.2.9 Flowchart

None.

2.4.2.10 Additional Notes

None.

2.4.3 Update Alloy

2.4.3.1 Purpose

The Edit Alloy section enables authorized users to update existing Alloy records to ensure accurate and current data, supporting the ERP's alignment with evolving international standards and business requirements.

2.4.3.2 User Type

Registered Users, Admins.

2.4.3.3 Screen Layout

Same Create Alloy Layout.

2.4.3.4 UI Elements

Same Create Alloy Layout.

2.4.3.5 Functional Requirements

- **Initiate Update Process**
  - **Description:** The update process is initiated by clicking the Edit button in the Action column of the Alloy table.
  - **Functionality:**
    - **Edit Button Action:**
      - Loads the selected Alloy's existing details (Name, Short Name, Rate, Rate fix and Is active) into the Alloy Creation Form.
      - Pre-populates the form fields with the current values of the selected Alloy record to enable editing.
  - **Expected Outcome:** The Alloy Creation Form is populated with the selected Alloy's current data, ready for modification.
- **Modify Alloy Details**
  - **Description:** Allows users to change one or more fields in the Alloy record, such as Name, Short Name, Rate, Rate fix and Is active.
  - **Fields Available for Update:**
    - Name: Modify the Alloy's full name.
    - Short Name: Update the abbreviated name for the Alloy.
    - Rate: Modify the Alloy rate.
    - Rate fix: Sets the rate fix status of the Alloy either "Yes" or "No".
    - Is Active: Sets the active status of the Alloy to either "Active" or "De-active."
  - **Expected Outcome:** Users can update all editable fields as required before saving the record.
- **Form Validation (Update Mode)**
  - **Purpose:** Ensures that updated information meets validation requirements before submission.
  - **Validation Criteria:**
    - **Mandatory Fields:** Name, Short Name and Rate must not be empty.
    - **Specific Field Validation:**
      - **Name:** Up to 50 characters, allows letters, spaces, and certain special characters.
      - **Short Name:** 2 to 5 uppercase letters.
      - **Rate:** Up to 50 characters, allows numerics and decimals
    - **Error Handling:** If validation fails, display specific error messages to guide the user (e.g., "Alloy Name must be unique").

- **Expected Outcome:** All required fields are validated, and any errors are shown to the user before submitting the update.

- **Submit Updated Data**
  - **Description:** Saves the modified data to the database upon successful validation.
  - **Functionality:**
    - **Submit Button:**
      - Saves the updated Alloy data to the database and refreshes the table to reflect changes.
      - Displays a success message to confirm the update (e.g., "Alloy details have been successfully updated").
  - **Expected Outcome:** The updated Alloy information is stored in the database, and the user receives confirmation of the successful update.
- **Cancel Update**
  - **Purpose:** Allows users to discard changes if they choose not to update the Alloy record.
  - **Functionality:**
    - **Cancel Option:** Users can cancel the update operation by closing the form or clicking a "Previous" button.
    - **Expected Outcome:** The form closes without saving changes, leaving the original Alloy record intact.
- **Confirmation Message**
  - **Purpose:** Notifies the user of the successful completion of the update operation.
  - **Functionality:**
    - Display Message: Upon a successful update, display a confirmation message (e.g., "Alloy details have been successfully updated").
    - Expected Outcome: The confirmation message assures the user that the changes were saved.

2.4.3.6 Data Requirements

None.

2.4.3.7 Non-Functional Requirements

None.

2.4.3.8 Configurations

None.

2.4.3.9 Flowchart

None.

2.4.3.10 Additional Notes

None.

2.4.4 Remove Alloy

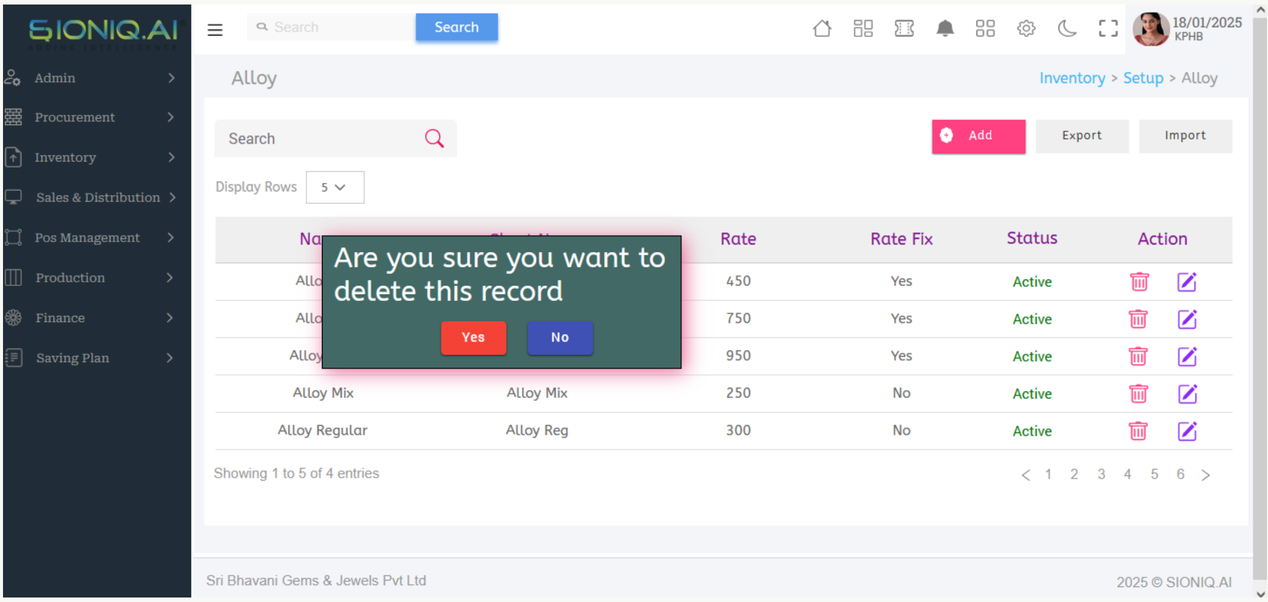
2.4.4.1 Purpose

This section allows for the safe removal of a Alloy from the ERP system, typically when the Alloy is no longer relevant to business operations. The action may be restricted if there are dependencies, such as existing records in other modules linked to that Alloy, and safeguards are in place to ensure data integrity across the system.

2.4.4.2 User Type

Registered Users, Admins.

2.4.4.3 Screen Layout



2.4.4.4 UI Elements

None.

2.4.4.5 Functional Requirements

○ **Access Control**

- **Purpose:** Ensure that only authorized users can perform the delete operation.
- **Functionality:**
  - **Delete Permission:** The Delete button is only accessible to users who have been granted delete permissions in the Configuration Section.

- **Initiate Delete Action**
  - **Description:** The delete process begins when an authorized user clicks the Delete button in the Action column of the Alloy table.
  - **Functionality:**
    - **Delete Button Action:**
      - Prompts a delete confirmation message to prevent accidental deletion.
- **Delete Confirmation Prompt**
  - **Purpose:** Provide a confirmation prompt to ensure the user wants to proceed with deletion.
  - **Functionality:**
    - **Confirmation Message:** When the Delete button is clicked, display a warning message:
      - "Are you sure you want to delete this Alloy?"
    - **Options:**
      - **Yes:** Confirms the deletion and proceeds with removing the Alloy record.
      - **No:** Cancels the delete action without any changes to the data.
  - **Expected Outcome:** The Alloy record is deleted only if the user confirms by selecting "Yes."
- **Delete Execution**
  - **Description:** Once confirmed, the system proceeds to update “Status=0” int the Alloy record from the database.
  - **Functionality:**
    - **Data Removal:** Updated the selected Alloy record from the database [status=0].
    - **Dependencies Check:**
      - Before deletion, the system checks for any dependencies or associations (e.g., Production, Inventory or other references tied to this Alloy).
      - If dependencies exist, display a message (e.g., "Cannot delete Alloy as it has associated Alloy.") and halt the delete process.
- **Success Message**
  - **Purpose:** Inform the user of the successful completion of the delete action.
  - **Functionality:**
    - **Display Message:** Upon successful deletion, display a success message such as "Alloy has been successfully deleted."
  - **Expected Outcome:** The user sees a confirmation that the record was deleted.
- **Refresh Table View**
  - **Description:** Automatically updates the Alloy table view to reflect the changes made by the deletion.
  - **Functionality:**
    - Refreshes the table view, removing the deleted Alloy record from the list.
    - Pagination Update: Adjusts the pagination if necessary, ensuring the remaining records are displayed correctly.

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2.4.4.6 Data Requirements

None.

2.4.4.7 Non-Functional Requirements

None.

2.4.4.8 Configurations

None.

2.4.4.9 Flowchart

None.

2.4.4.10 Additional Notes

None.