SIONIQ.AI®
ADDING INTELLIGENCE

# REQUIREMENT DOCUMENT

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



# Revision History

| Name | Date | Reason For Changes | Version |
|---|---|---|---|
| | | | |
| | | | |

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REQUIREMENT DOCUMENT

# 1. Introduction

## 1.1 Purpose

<Identify the product whose software requirements are specified in this document, including the revision or release number. Describe the scope of the product that is covered by this SRS, particularly if this SRS describes only part of the system or a single subsystem.>

## 1.2 Document Conventions

<Describe any standards or typographical conventions that were followed when writing this SRS, such as fonts or highlighting that have special significance. For example, state whether priorities for higher-level requirements are assumed to be inherited by detailed requirements, or whether every requirement statement is to have its own priority.>

## 1.3 Intended Audience and Reading Suggestions

<Describe the different types of reader that the document is intended for, such as developers, project managers, marketing staff, users, testers, and documentation writers. Describe what the rest of this SRS contains and how it is organized. Suggest a sequence for reading the document, beginning with the overview sections and proceeding through the sections that are most pertinent to each reader type.>

## 1.4 Project Scope

<Provide a short description of the software being specified and its purpose, including relevant benefits, objectives, and goals. Relate the software to corporate goals or business strategies. If a separate vision and scope document is available, refer to it rather than duplicating its contents here. An SRS that specifies the next release of an evolving product should contain its own scope statement as a subset of the long-term strategic product vision.>

## 1.5 References

<List any other documents or Web addresses to which this SRS refers. These may include user interface style guides, contracts, standards, system requirements specifications, use case

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documents, or a vision and scope document. Provide enough information so that the reader could access a copy of each reference, including title, author, version number, date, and source or location.>

# 2. Admin Module

The **Admin Module** in the Jewellery ERP system is designed to provide comprehensive control over system configuration, user management, and security. This module enables administrators to define user roles, set access permissions, and manage user accounts, ensuring that each user has appropriate access to modules and data based on their role. Additionally, it offers settings for configuring master data, including product categories, pricing, tax configurations, and vendor details, which form the backbone of the ERP's operations. The Admin Module also includes tools for monitoring system performance, managing backups, and configuring workflows, providing a secure and streamlined environment that supports the unique needs of the jewellery industry. This centralized control empowers administrators to maintain system integrity, streamline operations, and ensure data accuracy across the ERP.

## 2.1 Client

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### 2.1.1 Data View

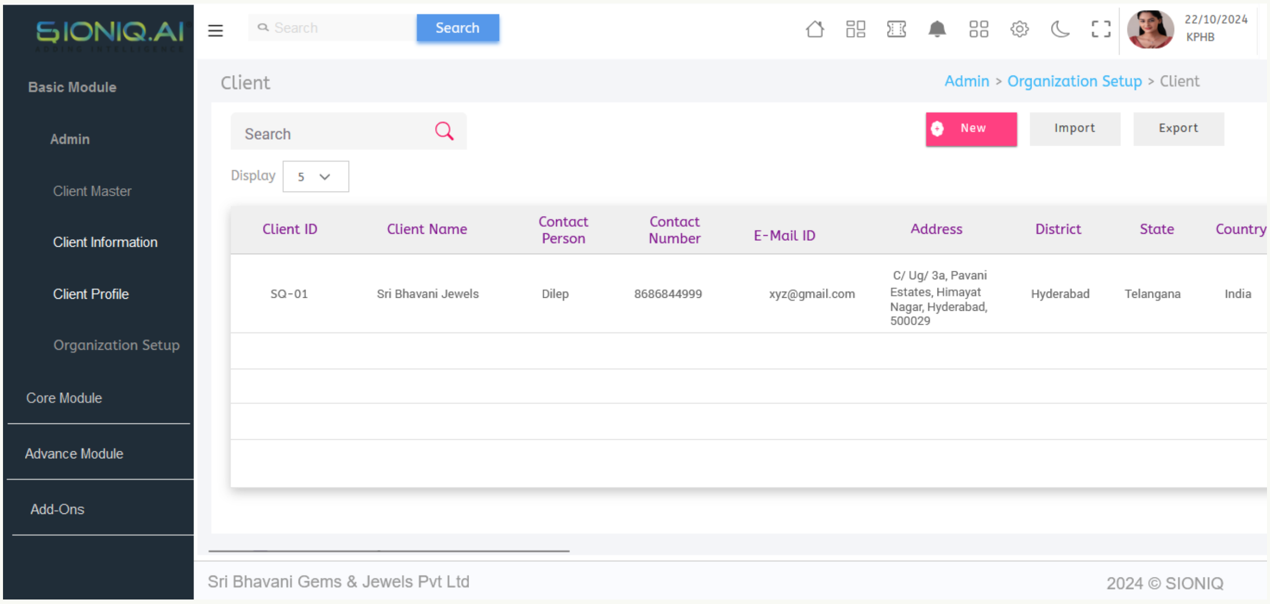
#### *2.1.1.1 Purpose*

This section provides a comprehensive overview of all client details registered in the system. Users can easily access detailed information, enabling efficient navigation and informed decision-making. The layout ensures quick retrieval of existing records, supporting seamless management and operational insights.

#### *2.1.1.2 User Type*

Sioniq Logins, Sioniq Admin.

#### 2.1.1.3 Screen Layout




#### 2.1.1.4 UI Elements

- **Buttons**
  - **Add Button**
    - **Label**: "New"
    - **Functionality**: Opens the Client Creation Form to add a new client record.
- **Tabular View**
  - **Description**: Provides a structured display of client details registered in the system.
  - **Columns**:
    - **Client ID**: Displays the unique identifier assigned to each client.
    - **Client Name**: Shows the full name of the client.
    - **Contact Person**: Displays the name of the primary contact person for the client.
    - **Contact Number**: Shows the contact number of the client.
    - **E-Mail ID**: Displays the email address associated with the client.
    - **Address**: Displays the full address of the client.
    - **District**: Shows the district associated with the client.
    - **State**: Displays the state where the client is located.
    - **Country**: Indicates the country associated with the client.
    - **Business Type**: Displays the type of business the client operates (e.g., Retail, Wholesale, Manufacturing).
    - **Number of Licenses**: Shows the total number of licenses the client holds.
    - **Start Date**: Displays the start date of the client's association or contract.
    - **End Date**: Shows the end date of the client's association or contract.
    - **Access Module**: Lists the modules accessible by the client.

- **Access Add-On's**: Displays any add-on features accessible by the client.
- **Data Storage Type**: Indicates the type of data storage utilized by the client (e.g., Cloud, On-Premise).
- **Number of Companies**: Displays the total number of companies linked to the client.
- **Number of Warehouses**: Shows the total number of warehouses managed by the client.
- **Number of Branches**: Displays the total number of branches associated with the client.
- **Number of Brands**: Indicates the total number of brands associated with the client.
- **Franchise Model**: Indicates whether the client operates under a franchise model (Yes/No).
- **Logo**: Displays the uploaded logo image representing the client.
- **Status**: Displays the active/inactive status of the client.
  - **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 client record (permission-based).
    - Functionality: Triggers a delete confirmation prompt before proceeding.
  - Edit: Allows modification of the client's information (permission-based).
    - Functionality: Opens the Client Creation Form populated with the selected client's data for editing.

### *2.1.1.5 Functional Requirements*

None.

### *2.1.1.6 Data Requirements*

- **Source**: Sioniq CRM Client On-Board Table
- **Fields Required**:
  - **Client Name**: The full name of the client.
  - **Contact Person**: The primary contact person for the client.
  - **Contact Number**: The contact number for reaching the client.
  - **E-Mail ID**: The email address associated with the client.
  - **Address**: The primary address of the client.
  - **Country**: The country where the client is located.
  - **State**: The state where the client is located.
  - **District**: The district where the client is located.
  - **Business Type**: The type of business the client operates (e.g., Retail, Wholesale, Manufacturing).

- **Number of Licenses**: Total number of licenses associated with the client.
- **Start Date**: The starting date of the client's association.
- **End Date**: The ending date of the client's association.
- **Access Module**: Modules accessible by the client.
- **Access Add-On's**: Additional features accessible by the client.
- **Data Storage Type**: Indicates the data storage type for the client (e.g., Cloud, On-Premise).
- **Number of Companies**: The total number of companies associated with the client.
- **Number of Warehouses**: The total number of warehouses linked to the client.
- **Number of Branches**: The total number of branches associated with the client.
- **Number of Brands**: The total number of brands related to the client.
- **Franchise Model**: Indicates whether the client uses a franchise model (Yes/No).
- **Logo**: The image representing the client's logo.
- **Status**: Indicates if the client is currently active (Boolean: active or inactive).

#### *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 **Sioniq Users** and **Admins**.
- **Available Permissions:**
  - **Add Client Permission**: Grants authorized users access to the "Add Client" button for creating new client records.
  - **Edit Permission**: Enables authorized users to access the **Edit** button in the **Action** column, allowing modification of existing client records.
  - **Delete Permission**: Provides authorized users access to the **Delete** button in the **Action** column, enabling deletion of client records.
- **Permission Assignment:**
  - Permissions are assigned exclusively to **Sioniq Users** and **Admins**, 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 Client

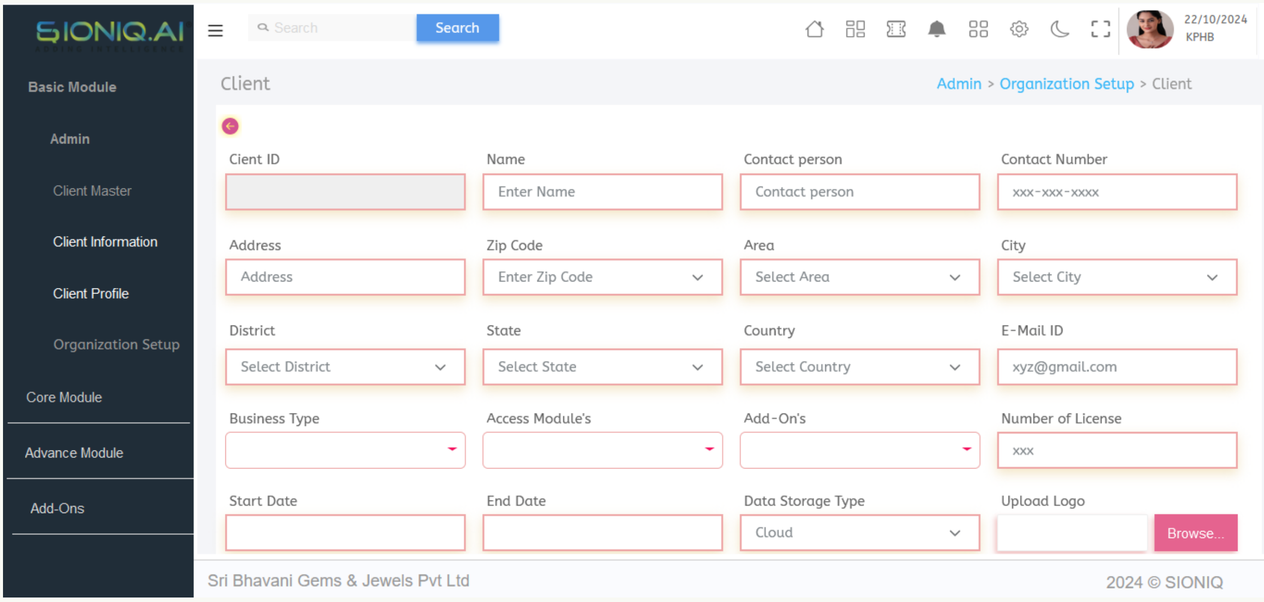
#### 2.1.2.1 Purpose

This section allows users to add a new client to the ERP system. Users can enter key information such as the client's name, contact details, address, and account-specific information. This process ensures consistent data entry for operational and reporting purposes.

#### 2.1.2.2 User Type

Sioniq Logins, Sioniq Admin.

#### 2.1.2.3 Screen Layout




#### 2.1.2.4 UI Elements

- **Client ID**
  - **Type:** Auto-Generated (Non-Editable)
  - **Label:** "Client ID"
  - **Editable:** No
  - **Description:** A unique identifier auto-generated by the system for each client record.

- **Validation:** Not applicable.

- **Name**
  - **Type:** Text Input (Text Editor)
  - **Label:** "Name"
  - **Editable:** Yes
  - **Description:** Allows users to enter the full name of the client. This input will be used to identify the client in the system.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 50 characters
    - **Allowed Characters:** Letters, spaces, and special characters (e.g., apostrophes, hyphens).
- **Contact Person**
  - **Type:** Text Input (Text Editor)
  - **Label:** "Contact Person"
  - **Editable:** Yes
  - **Description:** Name of the primary contact person for the client.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 50 characters.
- **Contact Number**
  - **Type:** Text Input
  - **Label:** "Contact Number"
  - **Editable:** Yes
  - **Description:** Primary contact number for the client.
  - **Validation:**
    - **Required:** Yes
    - **Format:** Numeric values only, minimum 10 digits.
- **Address**
  - **Type:** Text Area

- **Label:** "Address"
- **Editable:** Yes
- **Description:** Full address of the client.
- **Validation:**
  - **Required:** Yes

- **Zip Code**
  - **Type:** Searchable Dropdown
  - **Label:** "Zip Code"
  - **Editable:** Yes
  - **Description:** A searchable dropdown field that allows users to find a Zip Code by typing or scrolling.
  - **Options**: Import Zip Code.
    - **Source**: Zip Code Master
  - **Behavior**:
    - When a zip code is selected, related fields (**Area**, **City**, **District**, **State**, **Country**) are auto-filled using the associated data.
- **Area**
  - **Type**: Dropdown
  - **Label**: Area
  - **Editable**: Yes
  - **Description**: Select the area in which the client is located.
  - **Options**: Import Area.
    - **Source**: Area Master
- **City**
  - **Type**: Dropdown
  - **Label**: City
  - **Editable**: Yes
  - **Description**: Select the city associated with the client location.
  - **Options**: Import City.
    - **Source**: City Master

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- **District**
  - **Type**: Dropdown
  - **Label**: District
  - **Editable**: Yes
  - **Description**: Select the district of the client.
  - **Options**: Import District.
    - **Source**: District Master
- **State**
  - **Type**: Dropdown
  - **Label**: State
  - **Editable**: Yes
  - **Description**: Select the state associated with the client.
  - **Options**: Import State.
    - **Source**: State Master
- **Country**
  - **Type**: Dropdown
  - **Label**: Country
  - **Editable**: Yes
  - **Description**: Select the country of the client.
  - **Options**: Import Country
    - **Source**: Country Master
- **E-Mail ID**
  - **Type:** Text Input
  - **Label:** "E-Mail ID"
  - **Editable:** Yes
  - **Description:** Email address of the client.
  - **Validation:**
    - **Required:** Yes

- **Format:** Must be a valid email format.

- **Business Type**
  - **Type:** Dropdown
  - **Label:** "Business Type"
  - **Editable:** Yes
  - **Description:** Allows users to select the client's business type.
  - **Options:** Single Retail, Single Wholesale, Single Manufacturing, Multi Retail, Multi Wholesale, Multi Manufacturing, SAAS Multiple, SAAS Single.
  - **Validation:**
    - **Required:** Yes

- **Access Modules**
  - **Type:** Dropdown multi-selection
  - **Label:** "Access Modules"
  - **Editable:** Yes
  - **Description:** Allows selection of modules accessible to the client.
  - **Options:** Procurement, Inventory, POS, Order, Repair, B2B, Manufacturing, Bullion, ADP, HRMS, Accounts, Material Management, Fixed Assets.
  - **Validation:**
    - **Required:** Yes

- **Access Add-Ons**
  - **Type:** Dropdown multi-selection
  - **Label:** "Access Add-Ons"
  - **Editable:** Yes
  - **Description:** Allows selection of add-ons accessible to the client.
  - **Options:** E-Commerce, CRM, Marketing, Online ADP, ADP Website, Digital Catalog, BIS Report, Gold Loans, Sioniq Shopping Cart, OMS, Sioniq OMS.

- **Number of License**
  - **Type:** Text Input
  - **Label:** "Number of License"

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- **Editable:** Yes
- **Description:** Specifies the number of licenses assigned to the client.
- **Validation:**
  - **Required:** Yes
  - **Format:** Numeric only.

- **Start Date and End Date**
  - **Type:** Date Picker
  - **Labels:** "Start Date," "End Date"
  - **Editable:** Yes
  - **Description:** Specifies the contract period for the client.
  - **Validation:**
    - **Required:** Yes

- **Data Storage Type**
  - **Type:** Dropdown
  - **Label:** "Data Storage Type"
  - **Editable:** Yes
  - **Description:** Specifies the data storage architecture for the client.
  - **Options:** Cloud, De-Centralised, Centralised On-Premise.
  - **Validation:**
    - **Required:** Yes

- **Logo Uploader**
  - **Type:** File Upload
  - **Label:** "Logo"
  - **Editable:** Yes
  - **Description:** Allows users to upload a logo for the client.
  - **Validation:**
    - **Required:** No
    - **File Format:** Supports JPEG, PNG formats.

- **Size Limit:** Maximum 5 MB.

- **Number of Companies**
  - **Type:** Text Input
  - **Labels:** "Number of Companies".
  - **Editable:** Yes
  - **Description:** Specifies the quantities associated with the company.
  - **Validation:**
    - **Required:** Yes
    - **Format:** Numeric only.
- **Number of Warehouses**
  - **Type:** Text Input
  - **Labels:** "Number of Warehouses".
  - **Editable:** Yes
  - **Description:** Specifies the quantities associated with the company.
  - **Validation:**
    - **Required:** Yes
    - **Format:** Numeric only.
- **Number of Branches**
  - **Type:** Text Input
  - **Labels:** "Number of Branches".
  - **Editable:** Yes
  - **Description:** Specifies the quantities associated with the company.
  - **Validation:**
    - **Required:** Yes
    - **Format:** Numeric only.
- **Number of Brands**
  - **Type:** Text Input
  - **Labels:** "Number of Brands"

- **Editable:** Yes
- **Description:** Specifies the quantities associated with the company.
- **Validation:**
  - **Required:** Yes
  - **Format:** Numeric only.

- **Franchise Type**
  - **Type:** Dropdown
  - **Label:** "Franchise Type"
  - **Editable:** Yes
  - **Description:** Specifies whether the client operates under a franchise model.
  - **Options:** Null, Branch, Warehouse + Branch.
  - **Validation:**
    - **Required:** No
- **Is Active**
  - **Type:** Checkbox
  - **Label:** "Is Active"
  - **Editable:** Yes
  - **Default Value:** Checked (True)
  - **Behavior:**
    - **Checked:** The client is marked as active.
    - **Unchecked:** The client is inactive but remains in the database.
- **Submit Button**
  - **Type:** Button
  - **Label:** "Submit"
  - **Editable:** No
  - **Description:** Submits the filled form data to the database.
  - **Validation:** Ensures all mandatory fields are filled and validated.
- **Clear Button**

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- **Type:** Button
- **Label:** "Clear"
- **Editable:** No
- **Description:** Resets or clears all form fields, enabling a fresh start.

- **Previous Button**
  - **Type:** Button
  - **Label:** "Previous"
  - **Editable:** No
  - **Description:** Closes the Client Creation Form and returns the user to the main Client table view, discarding unsaved changes.

#### *2.1.2.5 Functional Requirements*

- **Actions**
  - **Submit Button Click**
    - **Action:** Triggers form submission if all required fields (e.g., Name, Contact Person, Contact Number, Address, etc.) are valid.
    - **Outcome:**
      - **Create Operation:** If it's a new entry, saves the client information to the database.
      - **Update Operation:** If editing an existing entry, updates the client information.
  - **Clear Button Click**
    - **Action:** Resets all fields to default values after user confirmation.
    - **Outcome:** Form fields are cleared for a new entry.
  - **Previous Button Click**
    - **Action:** Navigates back to the main Client table view, discarding any unsaved changes.

- **Validation**
  - **Mandatory Fields**
    - **Fields:** Name, Contact Person, Contact Number, Address, Zip Code, Business Type, Access Modules, Number of License, Start Date, End Date, Data Storage Type, Number of Companies, Number of Warehouses, Number of Branches, Number of Brands.
    - **Behavior:**

- Users must provide valid inputs for all mandatory fields.
- If any mandatory field is left empty, form submission is blocked, and an error message is displayed (see **Error Messages**).

- **Conditional Validation**
  - **Logo Field:**
    - If the "Logo" option is selected, the uploaded file must meet the required format (JPEG, PNG) and size limit (5 MB).
- **Field Format Validation**
  - **Contact Number:** Numeric only, minimum 10 digits.
  - **E-Mail ID:** Must follow a valid email format.
  - **Business Type, Access Modules, Access Add-Ons, Data Storage Type:** Valid values from predefined dropdown options.
  - **Numeric Fields:** (e.g., Number of License, Companies, Warehouses, Branches, Brands) Accept only numeric input.

- **Error Messages**
  - **Submit Attempt with Missing Values:**
    - **Condition:** If one or more required fields are empty when the Submit button is clicked.
    - **Behavior:** The system displays specific error messages indicating missing values.
    - **Examples:**
      - "Name is required."
      - "Contact Person is required."
      - "Contact Number is required."
  - **Validation Errors:**
    - **Condition:** If field values do not meet required formats.
    - **Behavior:** The system displays specific error messages.
    - **Examples:**
      - "Contact Number must be numeric and at least 10 digits."
      - "Invalid email format in E-Mail ID field."
      - "Number of License must be a numeric value."
- **Behavior**

- **Successful Submission**
- If all fields are valid, the form data is saved in the database, and a success confirmation message is displayed.
- **Form Reset**
- Clicking the **Clear** button resets all form fields to their default state after user confirmation.
- **Navigation**
- Clicking the **Previous** button navigates the user back to the Client table view and discards unsaved changes.

#### *2.1.2.6 Data Requirements*

- **Zip Code**
  - **Source:** Zip Code Master table
  - **Usage:**
    - Populate the searchable dropdown field in the Create Client form.
    - Auto-fill related fields (Area, City, District, State, Country) when a Zip Code is selected.
  - **Details:**
    - Contains the unique codes mapped to their respective Area, City, District, State, and Country.
    - Ensures accuracy and consistency in address data.
- **Area**
  - **Source:** Area Master table
  - **Usage:**
    - Populate the Area dropdown based on the selected Zip Code.
    - Validate the Area associated with the client's address.
  - **Details:**
    - Provides a list of areas linked to the Zip Code for the client's location.
    - Ensures proper mapping of Area to higher-level address components (City, District).
- **City**
  - **Source:** City Master table
  - **Usage:**

    - Populate the City dropdown based on the selected Zip Code.
    - Validate the City associated with the client's address.
  - **Details:**
    - Provides a list of cities linked to the Zip Code and Area for accurate client address capture.
- **District**
  - **Source:** District Master table
  - **Usage:**
    - Populate the District dropdown based on the selected Zip Code.
    - Validate the District associated with the client's address.
  - **Details:**
    - Contains the districts corresponding to the selected Zip Code, ensuring accurate geographical hierarchy.
- **State**
  - **Source:** State Master table
  - **Usage:**
    - Populate the State dropdown based on the selected Zip Code.
    - Validate the State associated with the client's address.
  - **Details:**
    - Provides a list of states linked to the selected Zip Code for consistent address data entry.
- **Country**
  - **Source:** Country Master table
  - **Usage:**
    - Populate the Country dropdown based on the selected Zip Code.
    - Validate the Country associated with the client's address.
  - **Details:**
    - Lists the countries linked to the selected Zip Code, completing the address hierarchy.

#### *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 Client

#### *2.1.3.1 Purpose*

The Client Edit section enables authorized users to modify existing client records to ensure accurate and up-to-date information is maintained in the ERP system. This functionality allows businesses to reflect changes in client details, operational structures, or contractual agreements, aligning the system with evolving business needs, compliance standards, and client relationships. It ensures the integrity and reliability of client data across all modules.

#### *2.1.3.2 User Type*

Sioniq Logins, Sioniq Admin.

#### *2.1.3.3 Screen Layout*

Same Create Client Layout.

#### *2.1.3.4 UI Elements*

Same Create Client Elements.

#### *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 client table.
  - **Functionality**:
    - **Edit Button Action**:
      - Loads the selected client’s existing details (e.g., Client ID, Name, Contact Person, Contact Number, Address, Zip Code, Business Type, etc.) into the Client Creation Form.
      - Pre-populates all form fields with the current values of the selected client record to enable editing.

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- **Expected Outcome**: The Client Creation Form is populated with the selected client's current data, ready for modification.

- **Modify Client Details**
  - **Description**: Allows users to edit one or more fields of the client record, such as Name, Contact Information, Business Type, and more.
  - **Fields Available for Update**:
    - **Client Details**:
      - Name: Update the full name of the client.
      - Contact Person: Modify the name of the primary contact person.
      - Contact Number: Update the primary contact number.
      - E-Mail ID: Change the client's email address.
      - Address: Update the full address, including Zip Code, Area, City, District, State, and Country.
    - **Business Information**:
      - Business Type: Update the business type of the client (e.g., Retail, Wholesale, Manufacturing).
      - Access Modules: Modify the selected modules available to the client.
      - Access Add-Ons: Update the add-ons accessible to the client.
    - **Operational Details**:
      - Number of Licenses, Companies, Warehouses, Branches, and Brands: Modify these numeric fields to reflect updated operational details.
      - Start Date and End Date: Update the contract period for the client.
      - Data Storage Type: Modify the data storage architecture (e.g., Cloud, Centralised, De-Centralised).
    - **Logo**:
      - Change or upload a new logo.
    - **Franchise Type**: Update the franchise model (e.g., Null, Branch, Warehouse + Branch).
    - **Status**: Change the active status to "Active" or "Inactive."
  - **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:
    - Name
    - Contact Person
    - Contact Number
    - Address
    - Business Type
  - **Specific Field Validation**:
    - Name: Up to 50 characters, allows letters, spaces, and certain special characters.
    - Contact Number: Numeric only, minimum 10 digits.
    - Address Fields: Valid options must be selected for Zip Code, Area, City, District, State, and Country.
    - E-Mail ID: Must follow a valid email format.
  - **Error Handling**: If validation fails, display specific error messages to guide the user, such as:
    - "Name is required."
    - "Contact Number must be at least 10 digits."
    - "Please select a valid Zip Code."
- **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 client details to the database and refreshes the client table to reflect the changes.
    - Displays a success message confirming the update, such as: "Client details have been successfully updated."
- **Expected Outcome**: The updated client record is stored in the database, and the user is notified of the successful update.

○ **Cancel Update**

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- **Purpose**: Allows users to discard changes if they choose not to update the client 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 client 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: "Client 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 Client

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#### *2.1.4.1 Purpose*

#### *2.1.4.2 User Type*

#### *2.1.4.3 Screen Layout*

#### *2.1.4.4 UI Elements*

#### *2.1.4.5 Functional Requirements*

#### *2.1.4.6 Data Requirements*

#### *2.1.4.7 Non-Functional Requirements*

#### *2.1.4.8 Configurations*

#### *2.1.4.9 Flowchart*

#### *2.1.4.10 Additional Notes*

## 2.2 Company

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

### 2.2.1 Data View

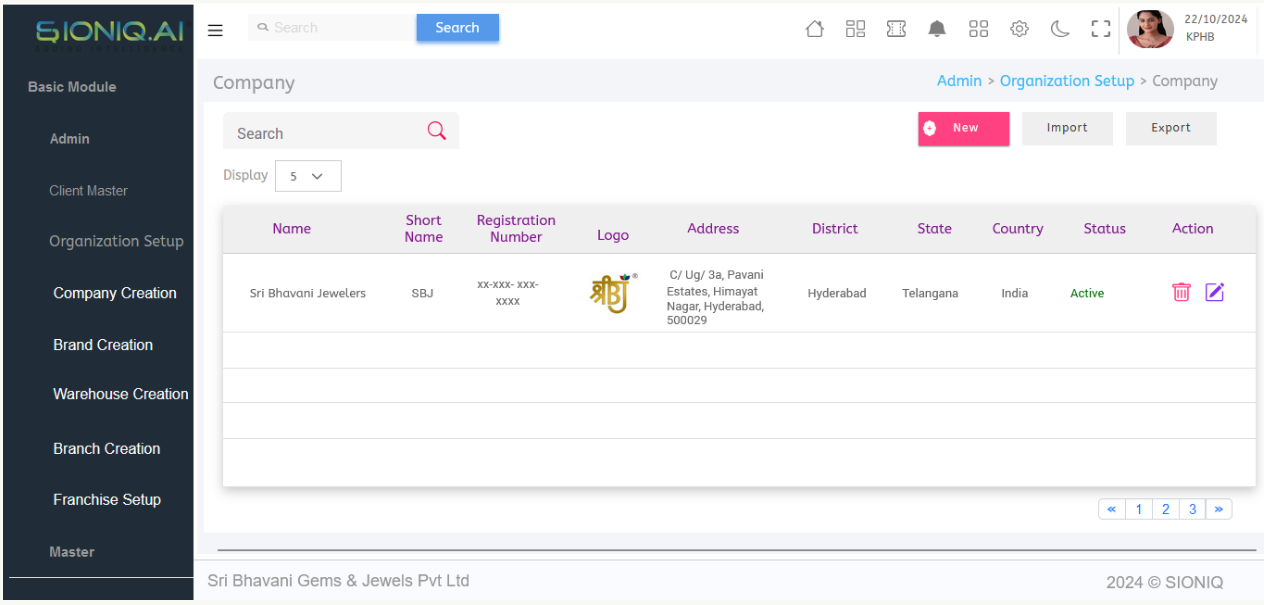
#### *2.2.1.1 Purpose*

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

#### *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 companies displayed in the table.
  - **Functionality:**
    - Enables users to search by Company Name, Short Name, or Registration Number.
    - 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 company records displayed per page.
    - Updates the table view immediately based on the selected number of rows.
- **Buttons**
  - **Add Company Button**
    - **Label**: "New"
    - **Functionality**: Opens the Company Creation Form to add a new company record.
  - **Export Button**
    - **Label**: "Export" (or Icon button as specified)
    - **Functionality**: Allows users to export the displayed company 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 company data.

- **Tabular View**
  - **Description**: Displays a structured view of all created companies.
  - **Columns**:
    - **Company Name**: Displays the full name of each company.
    - **Short Name**: Shows the abbreviated name for each company.
    - **Registration Number**: Displays the unique numeric or alphanumeric code assigned to each company.
    - **Logo**: Displays the uploaded logo image for each company.
    - **Address**: Displays the address details of each company.
    - **District**: Shows the district associated with the company.
    - **State**: Shows the state associated with the company.
    - **Country**: Displays the country associated with the company.
    - **Is Active**: Displays the active status of each company.
      - **Status**:
        - "**Active**" if the checkbox is checked in the form.
        - "**Inactive**" if the checkbox is unchecked in the form.
    - **Action**:
      - **Delete**: Deletes the selected company record (permission-based).
        - **Functionality**: Triggers a delete confirmation prompt (see "Delete Confirmation" in functional requirements).
      - **Edit**: Allows modification of a company’s information (permission-based).
        - **Functionality**: Loads the selected company’s data into the Company Creation Form for editing.
- **Paging for Table View**
  - **Description:** Includes pagination controls at the bottom of the table for navigating through multiple pages of company 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 company 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*

- **Company Data**

- **Source:** Company Creation Table
- **Fields Required:**
    - **Company Name**: The full name of the company.
    - **Company Short Name**: An abbreviated name for the company.
    - **Registration Number:** Company registers number.
    - **Logo:** An image representing the company log.
    - **Address:** The company's primary address.
    - **Country**: The country where the company is located.
    - **State**: The state where the company is located.
    - **District**: The district where the company is located
    - **Is Active**: Indicates if the company is currently active (Boolean: active or inactive).
- **Usage**: Main data for display in the table, searchable and filterable.

#### *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 Company Permission**: Grants access to the "Add Company" 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 Company

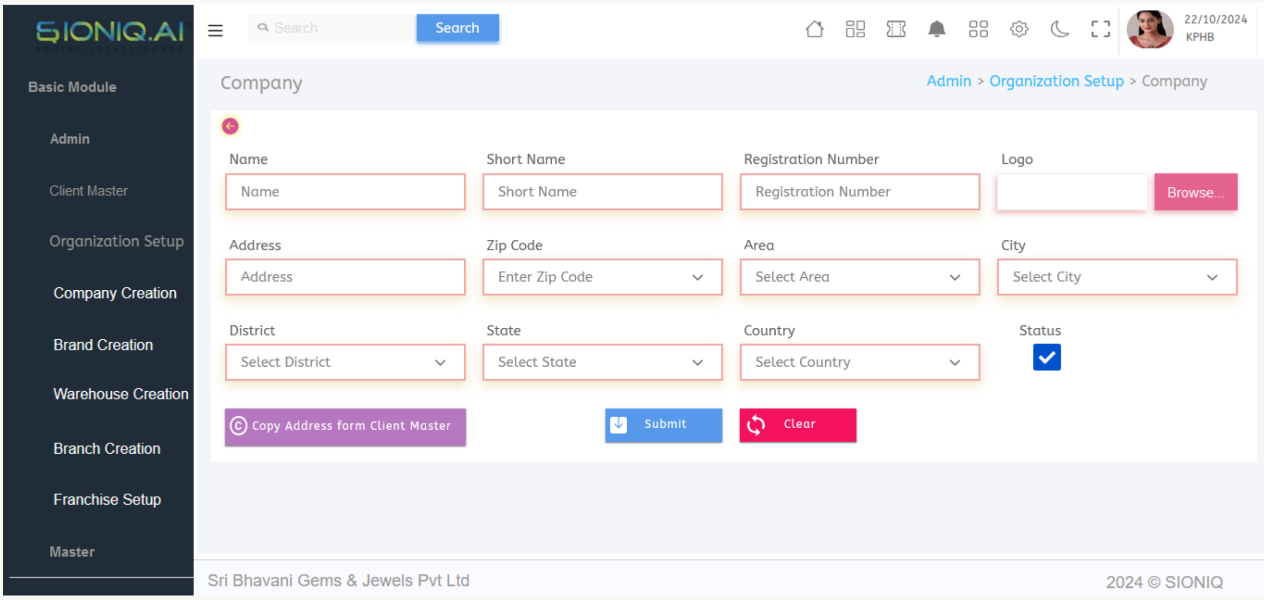
### 2.2.2.1 Purpose

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

### 2.2.2.2 User Type

Registered Users, Admins.

### 2.2.2.3 Screen Layout




### 2.2.2.4 UI Elements

- **Company Name**
  - **Type:** Text Input (Text Editor)
  - **Label:** "Name"
  - **Editable:** Yes
  - **Description:** Allows users to enter the full name of the company. This input will be used to identify the company within the system.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 50 characters
    - **Allowed Characters:** Letters, spaces, and special characters (e.g., apostrophes, hyphens)
- **Company Short Name**
  - **Type**: Text Input (Text Editor)
  - **Label**: "Short Name"
  - **Editable**: Yes

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- **Description**: Allows users to enter an abbreviated name for the company, typically in 2-5 characters (e.g., "NSJ" for the Nathu and Son's Jewellers).
- **Validation**:
  - Required: Yes
  - Character Limit: 5 characters
  - Allowed Characters: Uppercase letters only (e.g., "NSJ")

- **Company Register Number**
  - **Type**: Text Input (Text Editor)
  - **Label**: "Register Number"
  - **Editable**: Yes
  - **Description**: Field to enter the official registration number of the company.
  - **Validation**:
    - Required: Optional, as per company policy.
    - Allowed Characters: Alphanumeric with special characters (e.g., hyphens, slashes).
- **Company Logo**
  - **Type**: File Upload
  - **Label**: "Logo"
  - **Editable**: Yes
  - **Description**: Allows users to upload a company logo.
  - **Validation**:
    - Required: No.
    - File Format: Supports JPEG, PNG formats.
    - Size Limit: Maximum 5 MB.
- **Is Active**
  - **Type**: Checkbox
  - **Label**: "Is Active"
  - **Editable**: Yes
  - **Default Value**: Checked (True)
  - **Behavior**:
    - **Checked**: The company is marked as active and visible in the system (e.g., dropdowns, lists).
    - **Unchecked**: The company is inactive but remains in the database.
- **Copy Address from Client Master Button**
  - **Type**: Button

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- **Label**: "Copy Address from Client Master"
- **Editable**: No
- **Description**: Button that copies the address information from the Client Master Table, if needed.
- **Behavior**:
  - **Validation**: Ensures that only complete address records from the Client Master Table are available for copying.
  - **Overwrite Warning**: If address fields are already filled in, a prompt will confirm with the user if they want to overwrite existing data with the copied address.

- **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**

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- **Type**: Button
- **Label**: "Previous Icon"
- **Editable**: No (Standard Button)
- **Description**: Closes the Company Creation Form and returns the user to the main Company 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 (Name, and Short Name) contain valid values.
    - **Outcome**:
      - **Create Operation**: If it's a new entry, saves the new Company information.
- **Validation**
  - **Mandatory Fields**
    - **Fields:** Name, and Short Name 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 Company Name field is empty.
      - "Short Name is required" if only the Company Short Name field is empty.

### *2.2.2.6 Data Requirements*

- **Client Master Address Data:**
  - **Source**: Client Master Table.
  - **Fields Copied**:
    - Address: The main address line for the client's location.
    - Zip Code: The client's postal or zip code.
    - Area: The area where the client is located.

- City: The city where the client is located.
- District: The client's district.
- State: The client's state.
- Country: The client's country.

- **Usage:**
    - **Populating Address Fields**: The copied address details populate the corresponding fields in the Company Creation Form automatically.
    - **Editable Fields**: Once populated, these fields remain editable in case any modifications are needed before final submission.

##### *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 Company

##### *2.2.3.1 Purpose*

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

##### *2.2.3.2 User Type*

Registered Users, Admins.

##### *2.2.3.3 Screen Layout*

Same Create Company Layout.

##### *2.2.3.4 UI Elements*

Same Create Company Layout.

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*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 company table.
  - **Functionality:**
    - **Edit Button Action:**
      - Loads the selected company's existing details (Name, Short Name, Register Number, Logo, and Address) into the Company Creation Form.
      - Pre-populates the form fields with the current values of the selected company record to enable editing.
  - **Expected Outcome:** The Company Creation Form is populated with the selected company's current data, ready for modification.
- **Modify Company Details**
  - **Description:** Allows users to change one or more fields in the company record, such as Name, Short Name, Address, Register Number and Logo.
  - **Fields Available for Update:**
    - Name: Modify the company's full name.
    - Short Name: Update the abbreviated name for the company.
    - Register Number: Modify the company register number.
    - Logo: Update the company's logo.
    - Address: Modify the company's address including Area, Zip Code, City, District, State, Country.
    - Is Active: Sets the active status of the company 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, and Short Name 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.
    - **Error Handling:** If validation fails, display specific error messages to guide the user (e.g., "Company 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:**

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- Saves the updated company data to the database and refreshes the table to reflect changes.
- Displays a success message to confirm the update (e.g., "Company details have been successfully updated").

- **Expected Outcome:** The updated company 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 company 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 company 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., "Company details have been successfully updated").
    - Expected Outcome: The confirmation message assures the user that the changes were saved.

#### *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 Company

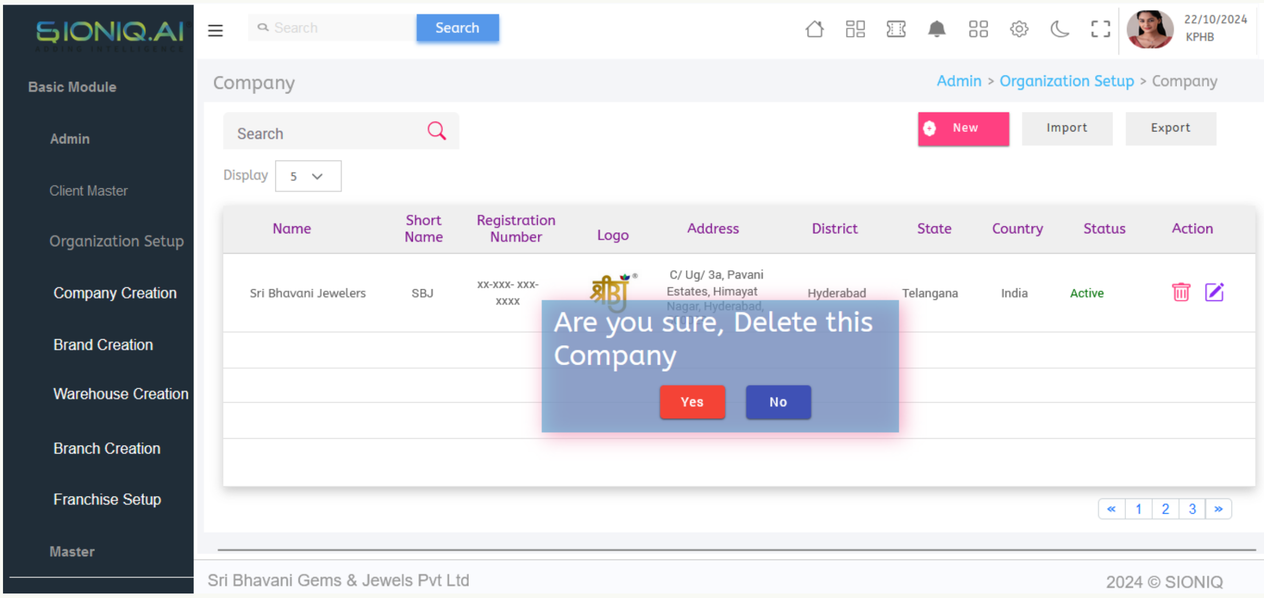
### *2.2.4.1 Purpose*

This section allows for the safe removal of a company from the ERP system, typically when the company 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 company, and safeguards are in place to ensure data integrity across the system.

### *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.
  - **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 company table.
  - **Functionality:**
    - **Delete Button Action:**

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- 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 company?"
    - **Options:**
      - **Yes:** Confirms the deletion and proceeds with removing the company record.
      - **No:** Cancels the delete action without any changes to the data.
  - **Expected Outcome:** The company 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 company record from the database.
  - **Functionality:**
    - **Data Removal:** Updated the selected company record from the database [status=0].
    - **Dependencies Check:**
      - Before deletion, the system checks for any dependencies or associations (e.g., warehouse, branch or other references tied to this company).
      - If dependencies exist, display a message (e.g., "Cannot delete company as it has associated company.") 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 "Company has been successfully deleted."
  - **Expected Outcome:** The user sees a confirmation that the record was deleted.
- **Refresh Table View**
  - **Description:** Automatically updates the company table view to reflect the changes made by the deletion.
  - **Functionality:**
    - Refreshes the table view, removing the deleted company record from the list.
    - Pagination Update: Adjusts the pagination if necessary, ensuring the remaining records are displayed correctly.

#### *2.2.4.6 Data Requirements*

None.

#### *2.2.4.7 Non-Functional Requirements*

None.

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##### 2.2.4.8 Configurations

None.

##### 2.2.4.9 Flowchart

None.

##### 2.2.4.10 Additional Notes

None.

## 2.3 Company Brand

The Company Brand section in the ERP system is designed to centralize and streamline the management of brands associated with various companies. This section allows users to create, edit, delete, and view details for each brand, organized by their parent companies, providing clear and accessible brand-level data. With filtering options by country and state, users can quickly locate specific brand information, aiding in location-based operations and supporting effective decision-making. By maintaining this structured brand data, the ERP system ensures consistency across modules, such as customer engagement, inventory management, and reporting.

### 2.3.1 Data View

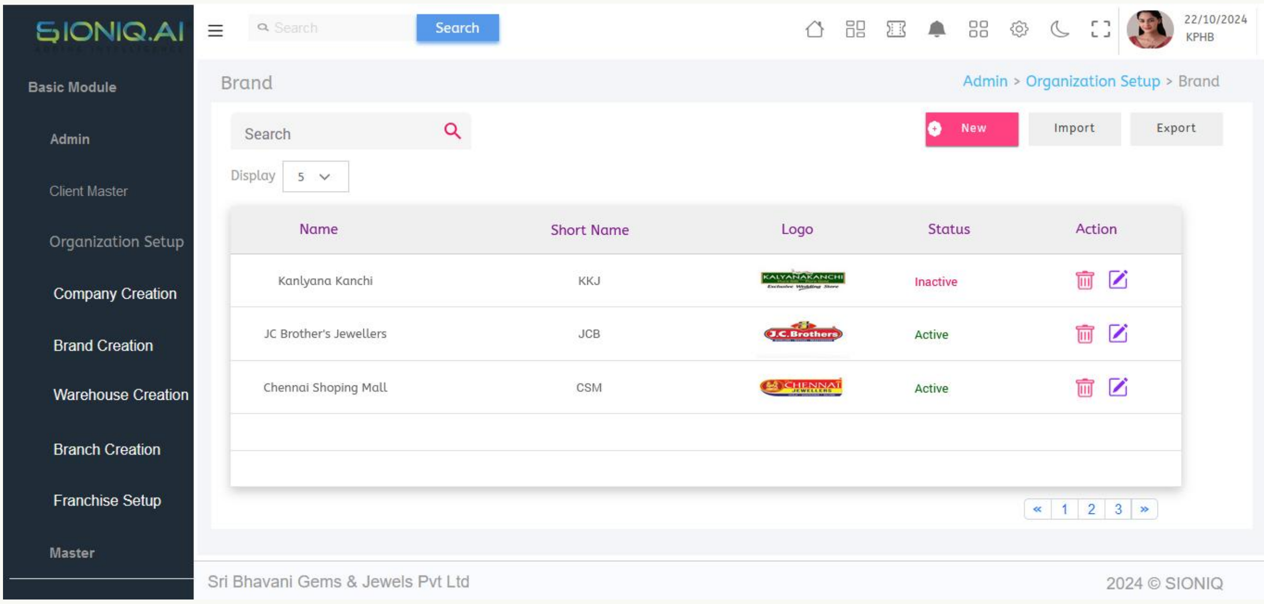
#### 2.3.1.1 Purpose

The Company Brand Table Data View provides a comprehensive overview of all company brands currently registered within the ERP system, displaying key details for each brand alongside its associated company. This view supports efficient data management and decision-making by allowing users to quickly access and review brand information in an organized, tabular format. Users can filter brand records by company enabling targeted searches and streamlined navigation. Additionally, the table includes action options, such as editing and deleting records, ensuring easy maintenance and updates of brand data as business needs evolve.

#### 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 for filtering brand records in the table.
  - **Functionality**:
    - Enables users to search by **Name**, or **Short Name** association.
    - Updates the displayed table dynamically to show only results that match the search query.
- **Display Dropdown**
  - **Description**: A dropdown to control the number of rows shown in the table at a time.
  - **Options**: Common choices (e.g., 5, 10, 25, 50, 100 rows per page).
  - **Functionality**:
    - Allows users to control the number of brand records displayed per page.
    - Updates the table view immediately based on the selected number of rows.
- **Buttons**
  - **Add Brand Button**
    - **Label**: "New"
    - **Functionality**: Opens the **Brand Creation Form** for adding a new brand record**.**
  - **Export Button**
    - **Label**: "Export" (or Icon button as specified)
    - **Functionality**: Allows users to export the displayed brand 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**:
    - **Redirect to Import Form**: Clicking the **Import** button redirects users to the import form page for batch uploading of brand data.

○ **Tabing View**

- **Description**: Displays a structured view of all created brands.
- **Columns**:
  - **Name**: Shows the full name of each district.
  - **Short Name**: Displays the abbreviated name for each district.
  - **Logo**: Displays the uploaded logo image for each brand.
  - **Is Active**: Displays the active status of each brand.
    - **Status**:
      - **"Active**" if the checkbox is checked in the form.
      - **"Inactive"** if the checkbox is unchecked in the form.
  - **Action**:
    - **Delete**: Deletes the selected brand record (permission-based).
      - **Functionality**: Triggers a delete confirmation prompt (see "Delete Confirmation" in functional requirements).
    - **Edit**: Allows modification of a brand information (permission-based).
      - **Functionality**: Loads the selected brand data into the **Brand Creation Form** for editing.

○ **Paging for Table View**

- **Description**: Includes pagination controls at the bottom of the table to navigate through multiple pages of brand 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 brand 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*

○ **Company Brand Data**

- **Source:** Brand Creation Table
- **Fields Required:**
  - **Brand Name**: The full name of the brand.

  - **Brand Short Name**: An abbreviated name for the brand.
  - **Logo:** An image representing the brand logo.
  - **Is Active**: Indicates if the brand is currently active (Boolean: active or inactive).
- **Usage**: Main data for display in the table, searchable and filterable.

#### *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 Brand Permission**: Grants access to the "Add Brand" 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 Brand

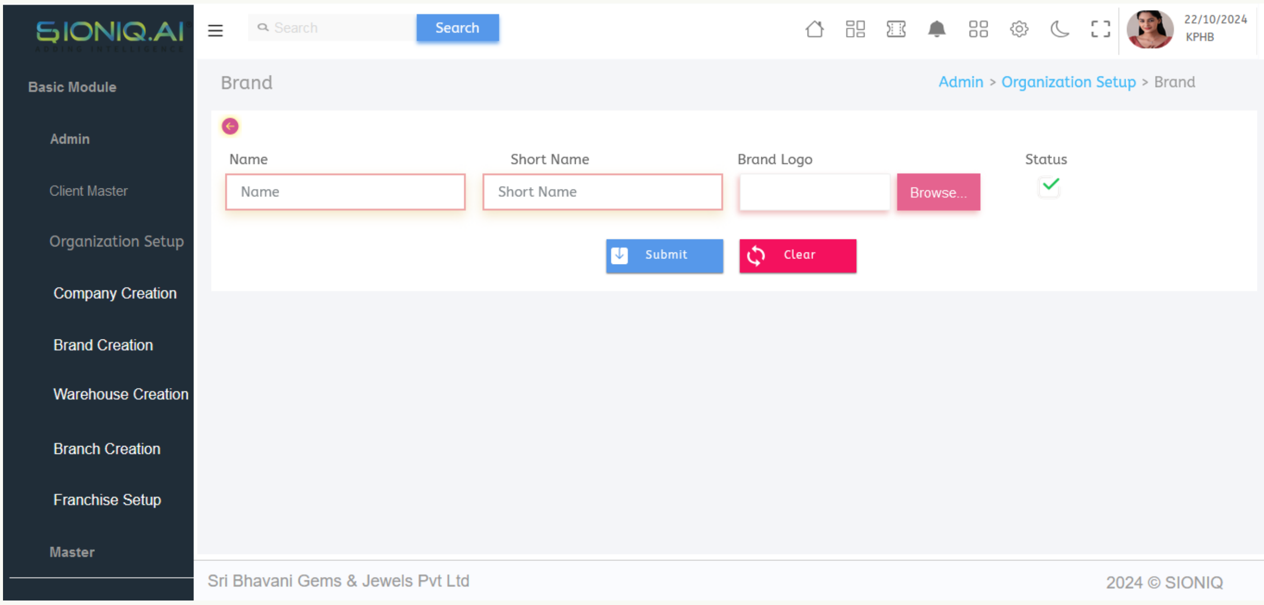
#### *2.3.2.1 Purpose*

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

#### *2.3.2.2 User Type*

Registered Users, Admins.

#### 2.3.2.3 Screen Layout




#### 2.3.2.4 UI Elements

- **Brand Name**
  - **Type:** Text Input (Text Editor)
  - **Label:** "Name"
  - **Editable:** Yes
  - **Description:** Allows users to enter the full name of the brand. This input will be used to identify the brand within the system.
  - **Validation:**
    - **Required:** Yes
    - **Character Limit:** 50 characters
    - **Allowed Characters:** Letters, spaces, and special characters (e.g., apostrophes, hyphens)
- **Brand Short Name**
  - **Type**: Text Input (Text Editor)
  - **Label**: "Short Name"
  - **Editable**: Yes
  - **Description**: Allows users to enter an abbreviated name for the brand, typically in 2-5 characters (e.g., "CSM" for the Chennai Shopping Mall).
  - **Validation**:
    - Required: Yes
    - Character Limit: 5 characters
    - Allowed Characters: Uppercase letters only (e.g., "CSM")
- **Brand Logo**

- **Type**: File Upload
- **Label**: "Logo"
- **Editable**: Yes
- **Description**: Allows users to upload a brand logo.
- **Validation**:
    - Required: No.
    - File Format: Supports JPEG, PNG formats.
    - Size Limit: Maximum 5 MB.

- **Is Active**
    - **Type**: Checkbox
    - **Label**: "Is Active"
    - **Editable**: Yes
    - **Default Value**: Checked (True)
    - **Behavior**:
        - **Checked**: The brand is marked as active and visible in the system (e.g., dropdowns, lists).
        - **Unchecked**: The brand 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 Brand Creation Form and returns the user to the main brand table view, discarding unsaved changes.
  - **Validation**: None required.

#### *2.3.2.5 Functional Requirements*

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

- "Short Name is required" if only the Brand Short Name field is empty.

#### *2.3.2.6 Data Requirements*

None.

#### *2.3.2.7 Non-Functional Requirements*

None.

#### *2.3.2.8 Configurations*

None.

#### *2.3.2.9 Flowchart*

None.

#### *2.3.2.10 Additional Notes*

None.

### 2.3.3 Update Brand

#### *2.3.3.1 Purpose*

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

#### *2.3.3.2 User Type*

Registered Users, Admins.

#### *2.3.3.3 Screen Layout*

Same Create Brand Layout.

#### *2.3.3.4 UI Elements*

Same Create Brand 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 brand table.
  - **Functionality:**

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- **Edit Button Action:**
  - Loads the selected brand existing details (Name, Short Name, and Logo) into the Brand Creation Form.
  - Pre-populates the form fields with the current values of the selected brand record to enable editing.
- **Expected Outcome:** The Brand Creation Form is populated with the selected brand current data, ready for modification.

- **Modify Brand Details**
  - **Description:** Allows users to change one or more fields in the brand record, such as Name, Short Name, and Logo.
  - **Fields Available for Update:**
    - Name: Modify the brand full name.
    - Short Name: Update the abbreviated name for the brand.
    - Logo: Update the brand logo.
    - Is Active: Sets the active status of the brand 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, and Short Name 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.
    - **Error Handling:** If validation fails, display specific error messages to guide the user (e.g., "Brand 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 brand data to the database and refreshes the table to reflect changes.
      - Displays a success message to confirm the update (e.g., "Brand details have been successfully updated").
  - **Expected Outcome:** The updated brand 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 brand 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 brand 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., "Brand details 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 Brand

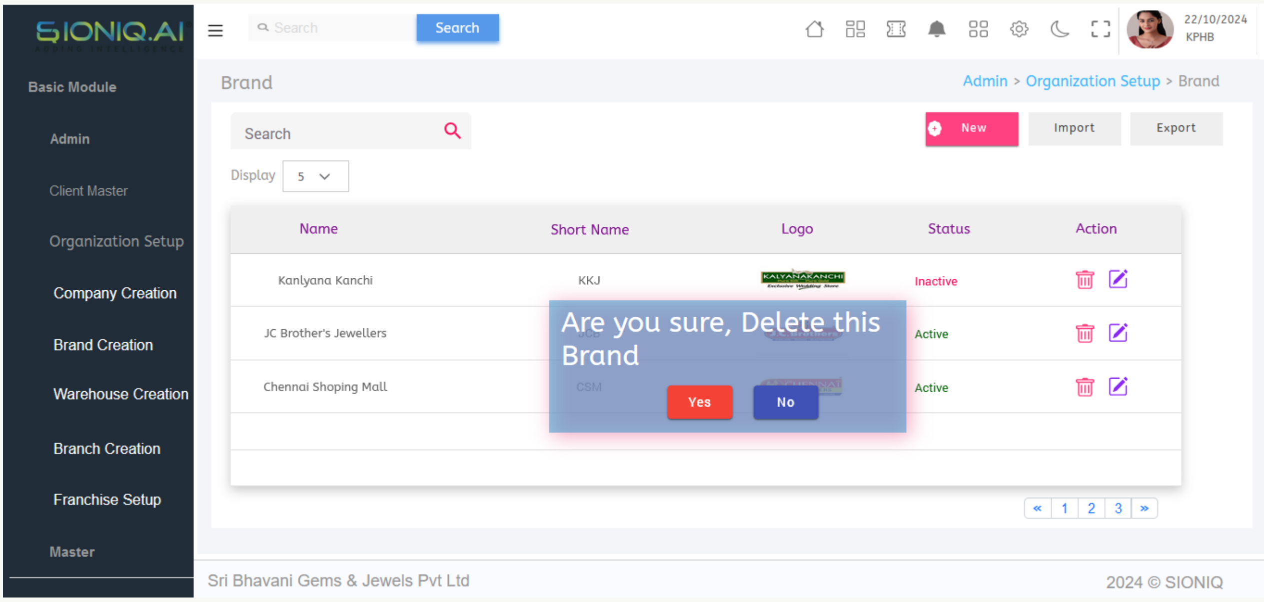
#### *2.3.4.1 Purpose*

This section allows for the safe removal of a brand from the ERP system, typically when the brand 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 brand, and safeguards are in place to ensure data integrity across the system.

#### *2.3.4.2 User Type*

Registered Users, Admins.

### 2.3.4.3 Screen Layout




### 2.3.4.4 UI Elements

None.

### 2.3.4.5 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 brand 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 brand?"
    - **Options:**
      - **Yes:** Confirms the deletion and proceeds with removing the brand record.
      - **No:** Cancels the delete action without any changes to the data.

- **Expected Outcome:** The brand 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 brand record from the database.
- **Functionality:**
  - **Data Removal:** Updated the selected brand record from the database [status=0].
  - **Dependencies Check:**
    - Before deletion, the system checks for any dependencies or associations (e.g., warehouse, branch or other references tied to this brand).
    - If dependencies exist, display a message (e.g., "Cannot delete brand as it has associated brand.") 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 "brand has been successfully deleted."
- **Expected Outcome:** The user sees a confirmation that the record was deleted.

○ **Refresh Table View**

- **Description:** Automatically updates the brand table view to reflect the changes made by the deletion.
- **Functionality:**
  - Refreshes the table view, removing the deleted brand record from the list.
  - Pagination Update: Adjusts the pagination if necessary, ensuring the remaining records are displayed correctly.

#### *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 Warehouse

The **Warehouse Form** in the Jewellery ERP system is designed to streamline the entry, management, and tracking of warehouse-specific data. This form allows users to create, edit, delete, and view details related to warehouses. By centralizing warehouse information, the form ensures consistency in inventory management, order processing, and logistics across various modules. This supports efficient operations, accurate reporting, and compliance with global standards, enabling seamless management of the supply chain within the ERP system.

### 2.4.1 Data View

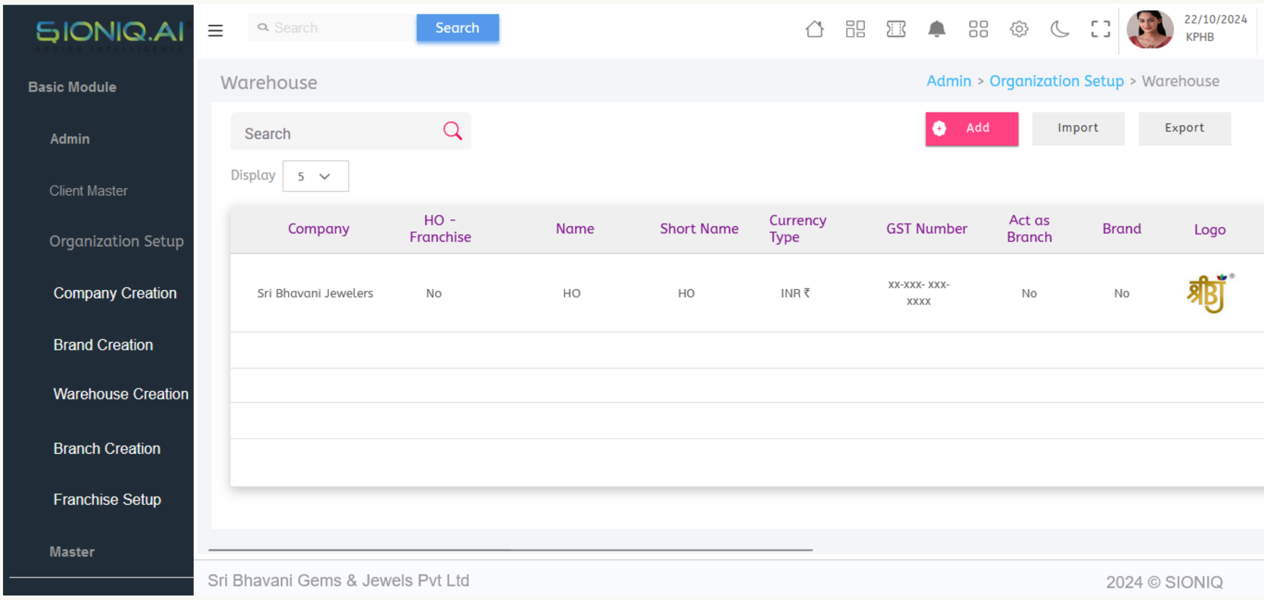
#### *2.4.1.1 Purpose*

The Warehouse Table Data View offers a detailed and organized overview of all warehouses registered in the ERP system, providing essential information about each warehouse's location, capacity, and operational status. This view enables users to quickly locate and assess individual warehouses, including details like address, city, state, country, and active status. The table supports filtering options, allowing users to refine their search by warehouse location or status for efficient navigation. With action buttons for editing and deleting entries, users can easily manage warehouse records, keeping the system updated to reflect current logistics and inventory needs.

#### *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 the warehouse records displayed in the table.
  - **Functionality**:
    - Enables users to search by attributes such as Company, Name, Short Name, or Location (District, State, Country).
    - Dynamically updates the displayed table to show only results that match the search criteria.
- **Display Dropdown**
  - **Description**: A dropdown to control the number of rows shown in the table at a time.
  - **Options**: Common choices such as 5, 10, 25, 50, or 100 rows per page.
  - **Functionality**:
    - Allows users to set how many warehouse records are displayed per page.
    - The table updates immediately based on the selected number of rows.
- **Button**
  - **Add Warehouse Button**
    - **Label**: "New"
    - **Functionality**: Opens the Warehouse Creation Form to add a new warehouse record to the system.

- **Export Button**
    - **Label**: "Export" (or icon button as specified)
    - **Functionality**:
        - Allows users to export the displayed warehouse data in various file formats, such as Excel.
        - Exports either all or filtered data based on the current view and search filter.
- **Import Button**
    - **Label**: "Import" (or icon button as specified)
    - **Functionality**:
        - Redirects users to the Import Form page, where warehouse data can be imported from external files.

○ **Tabular View**

- **Description**: Displays a structured view of all registered warehouses.
- **Columns**:
    - **Company**: Displays the parent company associated with each warehouse.
    - **Name**: Shows the full name of each warehouse.
    - **Short Name**: Abbreviated name for quick reference.
    - **Currency Type**: Indicates the currency associated with the warehouse's transactions.
    - **GST Number**: Displays the warehouse's GST (Goods and Services Tax) number, if applicable.
    - **Act as Branch**: Identifies whether the warehouse also functions as a branch (Yes/No).
    - **Brand**: If the "Act as Branch" feature is enabled and the company has multiple brands, the system will display the brand associated with each warehouse.
    - **Logo**: Shows an image representing the warehouse, such as a company or brand logo.
    - **Address**: Displays the address details of the warehouse.
    - **District**: Shows the district location of each warehouse.
    - **State**: Displays the state where each warehouse is located.
    - **Country**: Indicates the country of the warehouse.
    - **Status**: Displays the active status of each warehouse, with values such as "Active" or "Inactive."
        - **Status**:

- "Active" if the checkbox is checked in the form.
- "Inactive" if the checkbox is unchecked in the form.

- **Action**:
  - **Edit**: Opens the Warehouse Creation Form populated with the warehouse's details for editing.
  - **Delete**: Triggers a delete confirmation prompt to remove the selected warehouse record from the system (permission-based).

- **Paging for Table View**
  - **Description**: Includes pagination controls at the bottom of the table to navigate through multiple pages of warehouse records.
  - **Functionality**:
    - Provides navigation buttons (e.g., "Previous" and "Next") to move between pages.
    - Shows page numbers, allowing users to jump directly to a specific page.
    - Updates the displayed warehouse records based on the selected page, making it easy to manage large datasets.

#### *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*

- **Data Source**
  - The data displayed in the Warehouse Table View is sourced from the Warehouse Creation Table
  - **Fields and Requirements**:
    - **Company**: Displays the name of the company to which the warehouse belongs.
    - **Name**: Full name of the warehouse.
    - **Short Name**: Abbreviated name for the warehouse.
    - **Currency Type**: The currency type associated with the warehouse's transactions.
    - **GST Number**: The Goods and Services Tax identification number for the warehouse.
    - **Act as Branch**: Indicates whether the warehouse also functions as a branch (Yes/No).
    - **Brand**: The brand associated with the warehouse.
    - **Logo**: Image/logo representing the warehouse or its brand.
    - **Address**: Full address of the warehouse.
- **Usage**
  - The table data is used for operational decisions, navigation, and reporting. All fields are searchable and filterable based on the requirements.

#### *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 Warehouse Permission**: Grants access to the "Add Warehouse" 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 Warehouse

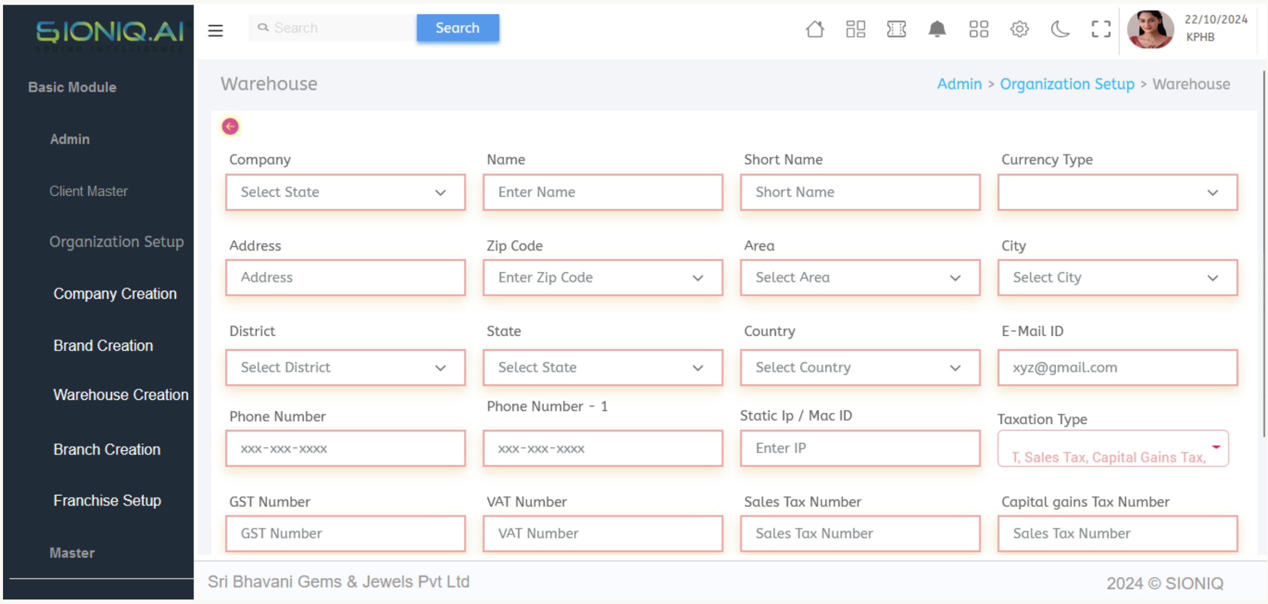
#### *2.4.2.1 Purpose*

This section allows users to add a new warehouse to the ERP system. Users can enter key information such as the warehouse name, short name, currency type, taxation number, logo, static Ip / mac Id and address. 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

- **Company**
  - **Type**: Dropdown (Select)
  - **Label**: “Select Company”
  - **Editable**: Yes
  - **Description**: This field allows the user to select the associated company for the warehouse. The selected company links the warehouse to a specific entity within the system.
  - **Validation**: Required
  - **Options**: Import Company Name’s.
    - **Source**: Company Master.

- **Warehouse Name**
  - **Type**: Text Input (Text Editor)
  - **Label**: “Name”
  - **Editable**: Yes
  - **Description**: Input field for entering the warehouse’s full name.
  - **Validation**:
    - **Required**: Yes
    - **Character Limit**: 50 characters

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- **Allowed Characters**: Letters, spaces, and special characters (e.g., apostrophes).

- **Warehouse Short Name**
  - **Type**: Text Input (Text Editor)
  - **Label**: "Short Name"
  - **Editable**: Yes
  - **Description**: Input for an abbreviated name of the warehouse.
  - **Validation**: Required, limited to 10 characters.
    - **Required**: Yes
    - **Character Limit**: 10 characters
    - **Allowed Characters**: Uppercase letters only (e.g., AMP-HO)

- **Currency Type**
  - **Type**: Dropdown
  - **Label**: Currency Type
  - **Editable**: Yes
  - **Description**: Select the currency used in transactions related to this warehouse.
  - **Validation**: Required
  - **Options**: Import Currency Name's.
    - **Source**: Currency Master

- **Logo**
  - **Type**: Dropdown
  - **Label**: Logo
  - **Editable**: Yes
  - **Description**: Specify the logo used for the warehouse.
  - **Validation**: Required
  - **Options**: "Add New", "Use Company", "Use Brand"

- **Upload Logo**

(Visible only if "Add New" is selected in **Logo**)

- **Type**: File Upload
- **Label**: Upload Logo

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- **Editable**: Yes
- **Description**: Allows uploading a custom logo for the warehouse.
- **Validation**: Required if "Add New" is chosen in the Logo dropdown.

○ **Select Brand Logo**

(Visible only if "Use Brand" is selected in **Logo**)

- **Type**: Dropdown
- **Label**: "Select Brand Logo"
- **Editable**: Yes
- **Description**: Allows selecting a logo associated with a brand.
- **Validation**: Required if "Use Brand" is chosen.
- **Options**: Import Brand Name.
    - **Source**: Brand Master

○ **Static IP/Mac ID**

- **Type**: Text Input (Text Editor)
- **Label**: Static IP / Mac ID
- **Editable**: Yes
- **Description**: Enter the static IP or MAC ID associated with this warehouse.
- **Validation**: Optional but must follow IP or MAC ID format if entered.

○ **Act as Branch**

- **Type**: Checkbox
- **Label**: Act as Branch
- **Editable**: Yes
- **Description**: Checkbox to indicate if the warehouse also functions as a branch.
- **Default Value**: Unchecked (False)
- **Behavior**:
    - If enabled, a dropdown for selecting the brand will be visible if the company has multiple brand options.
    - A text input field for specifying the square footage will also appear, allowing for comparison of stock and sales relative to the size of each branch.

- Determines operational role in system processes.

- **Taxation Type**
  - **Type**: Dropdown (Multi-selection)
  - **Label**: Taxation Type
  - **Editable**: Yes
  - **Description**: Select applicable taxation types for the warehouse.
  - **Validation**: Required, must select at least one option.
  - **Options**: Import Tax Name's.
    - **Source**: Tax Master table
  - **Behavior**: Displays specific input fields based on selected taxation type (e.g., GST Number and VAT Number fields).
- **Dynamic Taxation Labels**
  (Visible based on the selected taxation type, e.g., GST, VAT)
  - **GST Number**
    - **Type**: Text Input
    - **Label**: GST Number
    - **Editable**: Yes
    - **Validation**: Mandatory if GST is selected.
  - **VAT Number**
    - **Type**: Text Input
    - **Label**: VAT Number
    - **Editable**: Yes
    - **Validation**: Mandatory if VAT is selected.
- **Address**
  - **Type**: Text Input (Text Editor)
  - **Label**: Address
  - **Editable**: Yes
  - **Description**: Full address of the warehouse.
  - **Validation**: Required
- **Zip Code**
  - **Type**: Dropdown
  - **Label**: Zip Code

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- **Editable**: Yes
- **Description**: Select the zip code for the warehouse's location.
- **Options**: Import Zip Code.
    - **Source**: Zip Code Master

- **Area**
    - **Type**: Dropdown
    - **Label**: Area
    - **Editable**: Yes
    - **Description**: Select the area in which the warehouse is located.
    - **Options**: Import Area.
        - **Source**: Area Master
- **City**
    - **Type**: Dropdown
    - **Label**: City
    - **Editable**: Yes
    - **Description**: Select the city associated with the warehouse's location.
    - **Options**: Import City.
        - **Source**: City Master
- **District**
    - **Type**: Dropdown
    - **Label**: District
    - **Editable**: Yes
    - **Description**: Select the district of the warehouse.
    - **Options**: Import District.
        - **Source**: District Master
- **State**
    - **Type**: Dropdown
    - **Label**: State

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- **Editable**: Yes
- **Description**: Select the state associated with the warehouse.
- **Options**: Import State.
    - **Source**: State Master

- **Country**
    - **Type**: Dropdown
    - **Label**: Country
    - **Editable**: Yes
    - **Description**: Select the country of the warehouse.
    - **Options**: Import Country
        - **Source**: Country Master
- **E-Mail ID**
    - **Type**: Text Input (Text Editor)
    - **Label**: E-Mail ID
    - **Editable**: Yes
    - **Description**: Enter the warehouse's email ID for communication.
    - **Validation**: Optional
    - **Criteria**: If provided, the input must be in a valid email format.
- **Phone Number**
    - **Type**: Text Input (Text Editor)
    - **Label**: Phone Number
    - **Editable**: Yes
    - **Description**: Primary contact number for the warehouse.
    - **Validation**: Optional
    - **Criteria**: If provided, the input must be in a Numeric format.
- **Phone Number 1**
    - **Type**: Text Input (Text Editor)
    - **Label**: Phone Number 1

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- **Editable**: Yes
- **Description**: Secondary contact number, if available.
- **Validation**: Optional.
- **Criteria**: If provided, the input must be in a Numeric format.

- **Status**
  - **Type**: Checkbox
  - **Label**: Is Active
  - **Editable**: Yes
  - **Default Value**: Checked (True)
  - **Behavior**:
    - **Checked**: The warehouse is active and visible in the system.
    - **Unchecked**: The warehouse is inactive but retained in the database.
- **Copy Address from Company Master Button**
  - **Type**: Button
  - **Label**: Copy Address from Company Master
  - **Editable**: No
  - **Description**: Button to copy address data from the Company Master Table.
  - **Behavior**:
    - **Validation**: Ensures only complete address data can be copied.
    - **Overwrite Warning**: Prompts the user to confirm if they want to overwrite existing address data.
- **Submit Button**
  - **Type**: Button
  - **Label**: Submit
  - **Editable**: No (Standard Button)
  - **Description**: A button that submits the filled form details to the database.
  - **Validation**:
    - Ensures all required fields are completed and validated.

- **Behavior**:
  - If validation is successful, the form data is submitted to the database.
  - If validation fails, displays an error message indicating the fields that require correction.

- **Clear Button**
  - **Type**: Button
  - **Label**: “Clear”
  - **Editable**: No (Standard Button)
  - **Description**: Resets all form fields to default values.
  - **Validation**:
    - Not required; clearing the form does not require validation checks.
  - **Behavior**:
    - Reset Form Fields: Clears all entered data in the form fields, resetting them to their default values.
    - Confirmation Prompt: Prompts the user for confirmation to avoid accidental data loss.

- **Previous Button**
  - **Type**: Button
  - **Label**: “Previous Icon”
  - **Editable**: No (Standard Button)
  - **Description**: Closes the Warehouse Creation Form and returns the user to the main Warehouse table view, discarding any unsaved changes.
  - **Behavior**: Cancels any unsaved changes and navigates back.
  - **Validation**:
    - **Required**: No

#### *2.4.2.5 Functional Requirements*

- **Actions**
  - **Submit Button Click**
    - **Action**: Triggers form submission if all required fields (Warehouse Name, Warehouse Short Name, and Company) contain valid values.

- **Outcome**:
  - **Create Operation**: If it's a new entry, saves the new Warehouse information to the database.
  - **Update Operation**: If editing an existing entry, updates the warehouse information.

- **Validation**
  - **Mandatory Fields**
    - **Fields**: Warehouse Name, Warehouse Short Name, Company, are required fields.
    - **Behavior**:
      - Users must enter valid 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).
  - **Conditional Validation**
    - **Logo Options**:
      - If "Add New" is selected for Logo, the **Upload Logo** field becomes mandatory.
      - If "Use Brand" is selected for Logo, the **Select Brand** field becomes mandatory.
    - **Taxation Type**:
      - Based on selected taxation types, related input fields (e.g., GST Number, VAT Number) must be filled.
  - **Field Format Validation**:
    - **Warehouse Short Name**: Maximum 10 characters, letters only.
    - **Static IP/Mac ID**: Must follow a valid IP or MAC address format.
    - **E-Mail ID**: Must follow a valid email format.
    - **Phone Number**: Numeric values only, minimum 10 digits.

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

- "Warehouse Short Name is required" if the Warehouse Short Name field is empty.
- "Company is required" if the Company field is empty.

- **Validation Errors**
  - **Condition**: If any field does not meet the required format or constraints.
  - **Behavior**: The system displays an error message specifying the field and the expected input.
  - **Message Examples**:
    - "Short Name cannot exceed 10 characters."
    - "Invalid IP or MAC address format in Static IP/Mac ID field."
    - "Please select a Logo option or upload a valid logo image."

- **Behavior**
  - **Successful Submission**
    - If all required fields are valid, the form data is saved in the database, and a success confirmation is displayed.
  - **Form Reset**
    - Clicking the **Clear Button** resets all form fields to default values after user confirmation.
  - **Navigation**
    - Clicking the **Previous Button** discards unsaved changes and navigates back to the Warehouse Table View.

*2.4.2.6 Data Requirements*

- **Company Data**
  - **Source**: Company Master Table
  - **Usage**: Populates the "Select Company" dropdown in the Warehouse Creation form.
  - **Details**: Contains a list of all companies registered in the system, enabling users to associate a warehouse with a specific company.
- **Currency Data**
  - **Source**: Currency Master Table
  - **Usage**: Populates the "Currency Type" dropdown in the Warehouse Creation form.
  - **Details**: Contains a list of all available currency types in the system, allowing users to define the currency applicable to the warehouse.

- **Logo Options**
  - **Source**: User Input, Company Master, or Brand Master
  - **Usage**: Determines the source of the logo for the warehouse.
  - **Details**:
    - Users can choose to upload a new logo, use the company logo, or select a logo from an associated brand.
- **Brand Data**
  - **Source**: Brand Master Table
  - **Usage**:
    - Populates the "Select Brand" dropdown when "Use Brand" is selected for the logo.
    - The "Select Brand" dropdown is populated when the "Act as Branch" checkbox is checked, provided that the company has multiple brands available.
  - **Details**: Contains a list of all brands.
- **Taxation Data**
  - **Source**: Tax Master Table
  - **Usage**: Populates the "Taxation Type" multi-select dropdown in the Warehouse Creation form.
  - **Details**:
    - Contains a list of all applicable taxation types (e.g., GST, VAT).
    - Dynamically updates visible fields (e.g., GST Number, VAT Number) based on selected taxation types.
- **Address Data**
  - **Source**: User Input
  - **Usage**: Captures the warehouse address details including zip code, area, city, district, state, and country.
  - **Details**: Address-related fields dynamically populate based on selected options from master tables.
- **Zip Code Data**
  - **Source**: Zip Code Master Table
  - **Usage**: Populates the "Zip Code" dropdown in the Warehouse Creation form.
  - **Details**: Contains a list of zip codes associated with the selected area.

- **Area Data**
  - **Source**: Area Master Table
  - **Usage**: Populates the "Area" dropdown in the Warehouse Creation form.
  - **Details**: Contains a list of areas filtered based on the selected city.
- **City Data**
  - **Source**: City Master Table
  - **Usage**: Populates the "City" dropdown in the Warehouse Creation form.
  - **Details**: Contains a list of cities filtered based on the selected district.
- **District Data**
  - **Source**: District Master Table
  - **Usage**: Populates the "District" dropdown in the Warehouse Creation form.
  - **Details**: Contains a list of districts filtered based on the selected state.
- **State Data**
  - **Source**: State Master Table
  - **Usage**: Populates the "State" dropdown in the Warehouse Creation form.
  - **Details**:
    - Contains a list of states available in the system.
    - Dynamically filters based on the selected country.
- **Country Data**
  - **Source**: Country Master Table
  - **Usage**: Populates the "Country" dropdown in the Warehouse Creation form.
  - **Details**: Contains a complete list of countries in the system, used to filter states dynamically.

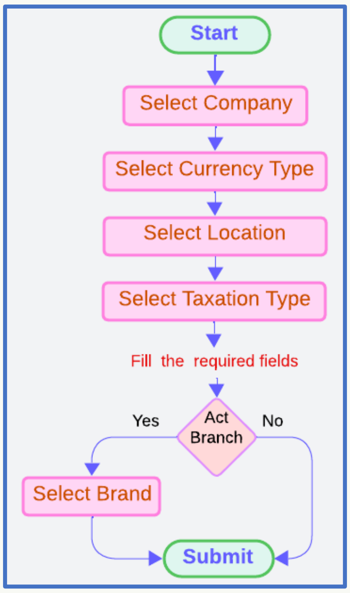
#### *2.4.2.7 Non-Functional Requirements*

None.

#### *2.4.2.8 Configurations*

None.

*2.4.2.9 Flowchart*




*2.4.2.10 Additional Notes*

None.

### 2.4.3 Update Warehouse

*2.4.3.1 Purpose*

The Warehouse Edit section allows authorized users to modify existing warehouse records to maintain accurate and up-to-date information. This ensures that the ERP system remains aligned with evolving operational requirements, international standards, and business needs.

*2.4.3.2 User Type*

Registered Users, Admins.

*2.4.3.3 Screen Layout*

Same Create Warehouse layout.

*2.4.3.4 UI Elements*

Same Create Warehouse layout.

*2.4.3.5 Functional Requirements*

- **Initiate Update Process**
  - **Description:** The update process begins when the user clicks the **Edit** button in the Action column of the warehouse table.

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- **Functionality:**
    - **Edit Button Action:**
        - Loads the selected warehouse's existing details (e.g., Company, Name, Short Name, Address, Logo, etc.) into the **Warehouse Creation Form**.
        - Pre-populates all form fields with the current values of the selected warehouse record to enable editing.
- **Expected Outcome:** The **Warehouse Creation Form** is populated with the selected warehouse's current data, ready for modification.

- **Modify Warehouse Details**
    - **Description:** Allows users to edit one or more fields of the warehouse record, such as Name, Address, Currency Type, and more.
    - **Fields Available for Update:**
        - **Company:** Modify the associated company.
        - **Name:** Update the full name of the warehouse.
        - **Short Name:** Change the abbreviated name for the warehouse.
        - **Currency Type:** Update the selected currency type.
        - **Logo:** Modify the logo, or upload a new one, based on the selected option (e.g., "Use Brand," "Use Company").
        - **Address:** Update the full address, including Country, State, District, City, and Area.
        - **Static IP/Mac ID:** Update the warehouse's static IP or Mac ID.
        - **Taxation Type:** Modify taxation details and corresponding entries (e.g., GST Number, VAT Number).
        - **Act as Branch:** Change the checkbox state to indicate if the warehouse functions as a branch.
        - **Contact Information:** Update E-Mail ID, Phone Number, and Phone Number-2.
        - **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:

- Company
- Warehouse Name
- Short Name

- **Specific Field Validation:**
  - **Warehouse Name:** Up to 50 characters, allows letters, spaces, and certain special characters.
  - **Short Name:** 2 to 3 uppercase letters.
  - **Currency Type:** Must select an option from the dropdown.
  - **Address Fields:** Valid options must be selected for Country, State, District, City, and Area.
- **Error Handling:** If validation fails, display specific error messages to guide the user, such as:
  - "Warehouse Name is required."
  - "Short Name must be 2-3 uppercase letters."
  - "Currency Type must be selected."

- **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 warehouse details to the database and refreshes the warehouse table to reflect the changes.
    - Displays a success message confirming the update, such as: "Warehouse details have been successfully updated."
- **Expected Outcome:** The updated warehouse 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 warehouse 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 warehouse 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: "Warehouse details have been successfully updated."
- **Expected Outcome:** The confirmation message assures the user that the updated data has been saved successfully.

#### *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 Warehouse

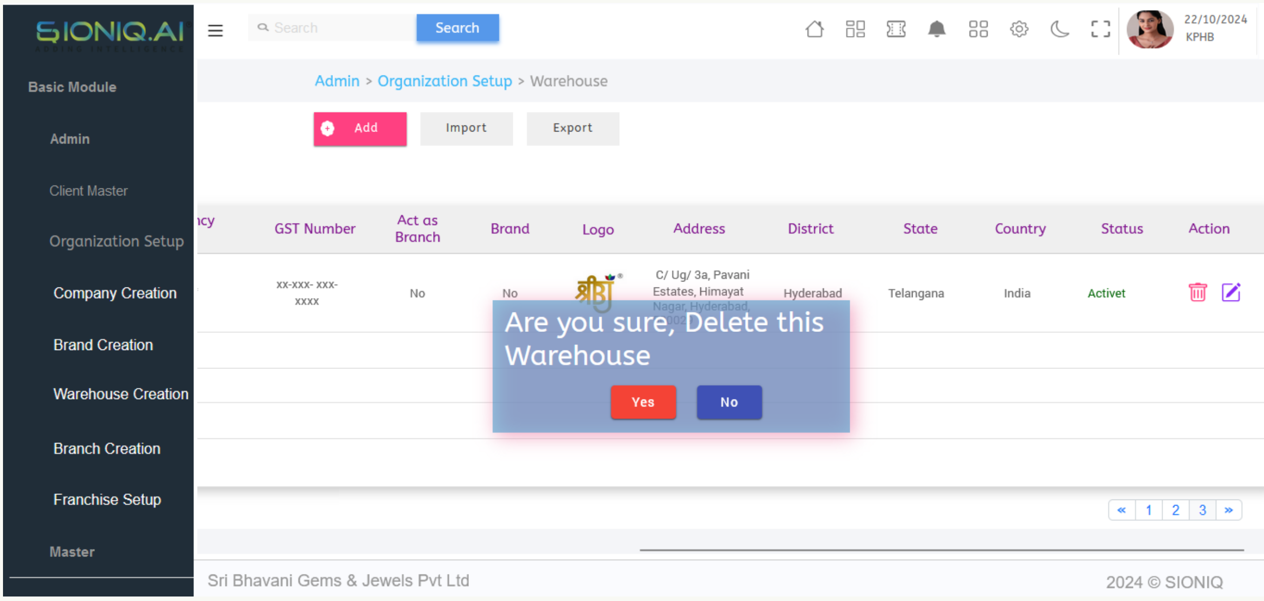
#### *2.4.4.1 Purpose*

The Warehouse Remove functionality allows authorized users to delete existing warehouse records from the system. This feature ensures that obsolete or incorrect warehouse data can be effectively managed, supporting accurate record maintenance and operational efficiency. The deletion process is permission-controlled and includes safeguards such as a confirmation prompt to prevent accidental removal of critical data.

### *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 for warehouses.
  - **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 warehouse 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 warehouse?"
    - **Options**:
      - **Yes**: Confirms the deletion and proceeds with removing the warehouse record.
      - **No**: Cancels the delete action without making any changes.
    - **Expected Outcome**: The warehouse record is deleted only when the user confirms by selecting **Yes**.

- **Delete Execution**
  - **Description**: After confirmation, the system marks the warehouse record as deleted in the database.
  - **Functionality**:
    - **Data Removal**:
      - Updates the selected warehouse 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 warehouse 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.

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- **Functionality**:
    - **Display Message**:
        - Upon successful deletion, display a success message such as:
            - "Warehouse has been successfully deleted."
    - **Expected Outcome**: The user receives confirmation that the record was deleted.

- **Refresh Table View**
    - **Description**: Updates the warehouse table view to reflect the changes made by the deletion.
    - **Functionality**:
        - **Refresh Table**:
            - Automatically removes the deleted warehouse 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.

#### *2.4.4.6 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.

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## 2.5 Branch

The Branch Summary form in the Jewellery ERP system is designed to provide a concise overview of branch-specific data. This form allows users to access and review essential information related to branches, including sales performance, inventory levels, customer data, and other relevant metrics. By summarizing branch data in one place, the form facilitates quick analysis, decision-making, and monitoring of branch operations within the ERP system. This consolidated view enables managers to identify trends, allocate resources effectively, and make informed business decisions. The Branch Summary form plays a crucial role in optimizing branch performance and ensuring seamless management of branch-related activities within the ERP system.

### 2.5.1 Data View

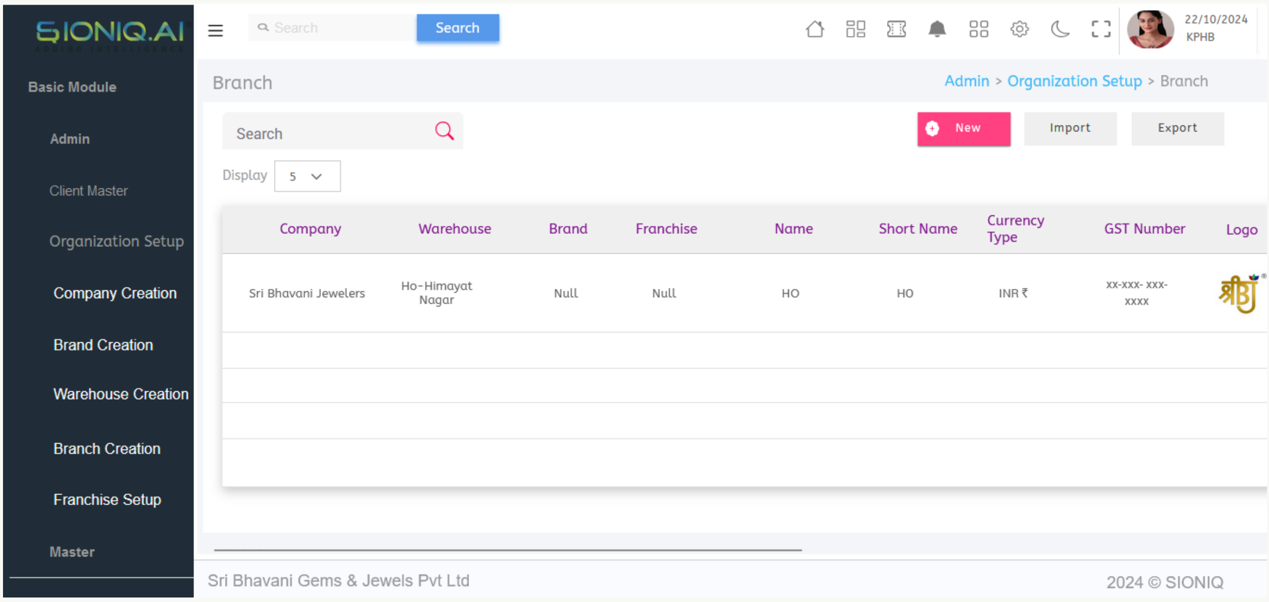
#### *2.5.1.1 Purpose*

The Branch Table Data View provides a comprehensive and organized overview of all branches registered in the ERP system, offering key information about each branch's location, operational status, and associated warehouse. This view enables users to quickly locate and assess individual branches, including details such as branch name, address, district, state, country, and active status. The table also supports filtering options, allowing users to narrow down their search by branch location or status for efficient navigation. With action buttons for editing and deleting entries, users can easily manage branch records, ensuring that the system remains updated and aligned with the organization's operational structure.

#### *2.5.1.2 User Type*

Registered Users, Admins.

### 2.5.1.3 Screen Layout




### 2.5.1.4 UI Elements

- **Search Option**
  - **Description**: A search bar located at the top of the data view section to filter the branch records displayed in the table.
  - **Functionality**:
    - Enables users to search by attributes such as Company, Name, Short Name, or Location (District, State, Country).
    - Dynamically updates the displayed table to show only results that match the search criteria.
- **Display Dropdown**
  - **Description**: A dropdown to control the number of rows shown in the table at a time.
  - **Options**: Common choices such as 5, 10, 25, 50, or 100 rows per page.
  - **Functionality**:
    - Allows users to set how many branch records are displayed per page.
    - The table updates immediately based on the selected number of rows.
- **Button**
  - **Add Branch Button**
    - **Label**: "New"
    - **Functionality**: Opens the Branch Creation Form to add a new branch record to the system.

- **Export Button**
  - **Label**: "Export" (or icon button as specified)
  - **Functionality**:
    - Allows users to export the displayed branch data in various file formats, such as Excel.
    - Exports either all or filtered data based on the current view and search filter.
- **Import Button**
  - **Label**: "Import" (or icon button as specified)
  - **Functionality**:
    - Redirects users to the Import Form page, where branch data can be imported from external files.

- **Tabular View**
  - **Description**: Displays a structured view of all registered branches.
  - **Columns**:
    - **Company**: Displays the parent company associated with each branch.
    - **Warehouse**: Displays the warehouse associated with each branch.
    - **Brand**: Shows the brand linked to the branch, if applicable.
    - **Name**: Shows the full name of each branch.
    - **Short Name**: Abbreviated name for quick reference.
    - **Currency Type**: Indicates the currency type associated with the branch's transactions.
    - **GST Number**: Displays the branch's GST (Goods and Services Tax) number, if applicable.
    - **Address**: Displays the address details of the branch.
    - **District**: Shows the district location of each branch.
    - **State**: Displays the state where each branch is located.
    - **Country**: Indicates the country of the branch.
    - **Status**: Displays the active status of each branch, with values such as "Active" or "Inactive."
      - **Status**:
        - "Active" if the checkbox is checked in the form.
        - "Inactive" if the checkbox is unchecked in the form.
    - **Action**:

- **Edit**: Opens the Branch Creation Form populated with the branch's details for editing.
- **Delete**: Triggers a delete confirmation prompt to remove the selected branch record from the system (permission-based).

- **Paging for Table View**
  - **Description**: Includes pagination controls at the bottom of the table to navigate through multiple pages of branch records.
  - **Functionality**:
    - Provides navigation buttons (e.g., "Previous" and "Next") to move between pages.
    - Shows page numbers, allowing users to jump directly to a specific page.
    - Updates the displayed branch records based on the selected page, making it easy to manage large datasets.

#### *2.5.1.5 Functional Requirements*

None.

#### *2.5.1.6 Data Requirements*

- **Data Source**
  - The data displayed in the Branch Table View is sourced from the Branch Creation Table.
- **Fields and Requirements:**
  - **Company**: Displays the name of the company to which the branch belongs.
  - **Name**: Full name of the branch.
  - **Short Name**: Abbreviated name for the branch.
  - **Warehouse**: The warehouse associated with the branch.
  - **Brand**: The brand associated with the branch, if applicable.
  - **Currency Type**: The currency type associated with the branch's transactions.
  - **GST Number**: The Goods and Services Tax identification number for the branch.
  - **Address**: Full address of the branch.
  - **District**: The district where the branch is located.
  - **State**: The state where the branch is located.
  - **Country**: The country where the branch is located.

- **Status**: Indicates whether the branch is active or inactive.

○ **Usage:**

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

#### *2.5.1.7 Non-Functional Requirements*

None.

#### *2.5.1.8 Configurations*

○ **Functionality:**

- **Permission Settings**: Controls the visibility and accessibility of buttons and actions based on user roles or permissions.

○ **Available Permissions:**

- **Add Branch Permission**: Grants access to the "Add Branch" button for adding new branch records.
- **Export Permission**: Grants access to the "Export" button for exporting branch data.
- **Import Permission**: Grants access to the "Import" button for importing branch data.
- **Edit Permission**: Allows users to access the "Edit" button in the Action column to modify branch records.
- **Delete Permission**: Allows users to access the "Delete" button in the Action column to delete branch records.

○ **Permission Assignment:**

- Admins or authorized users can assign permissions to individual users or user roles.

#### *2.5.1.9 Flowchart*

None.

#### *2.5.1.10 Additional Notes*

None.

### 2.5.2 Create Branch

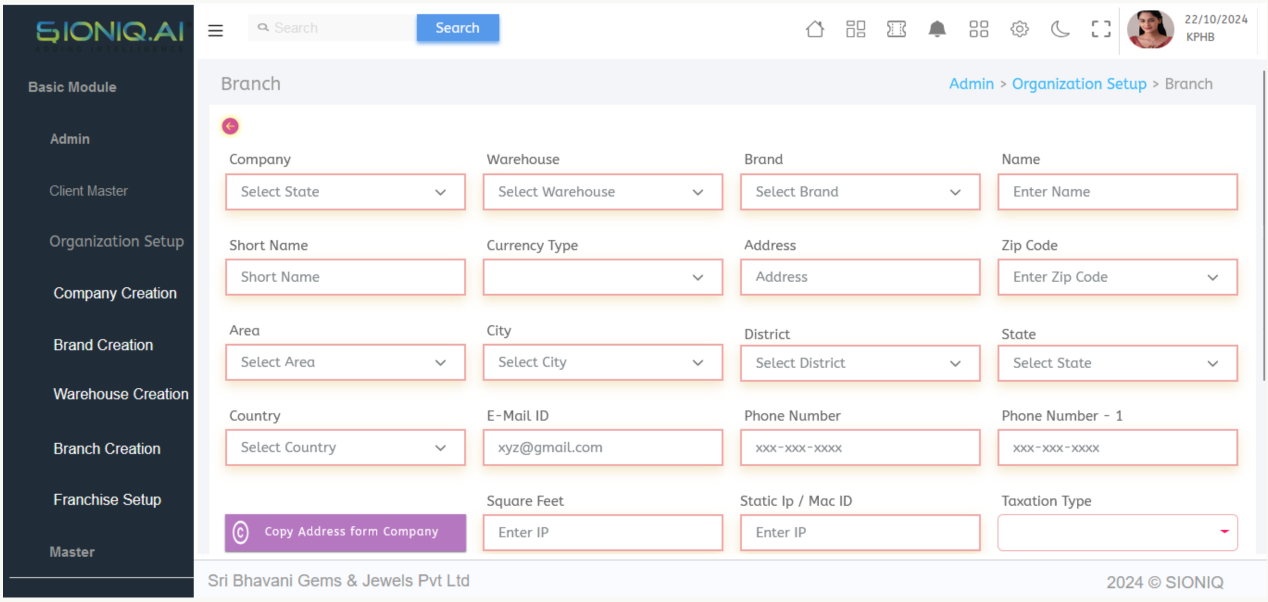
#### *2.5.2.1 Purpose*

This section allows users to add a new branch to the ERP system. Users can enter key information such as the branch name, short name, currency type, taxation number, logo, static IP/MAC ID, and address. This process ensures consistent data entry for operational and reporting purposes.

### *2.5.2.2 User Type*

Registered Users, Admins.

### *2.5.2.3 Screen Layout*




### *2.5.2.4 UI Elements*

- **Company**
  - **Type**: Dropdown (Select)
  - **Label**: “Select Company”
  - **Editable**: Yes
  - **Description**: This field allows the user to select the associated company for the branch. The selected company links the branch to a specific entity within the system.
  - **Validation**: Required
  - **Options**: Import Company Name’s.
    - **Source**: Company Master.
- **Warehouse**
  - **Type**: Dropdown (Select)
  - **Label**: “Select Warehouse”
  - **Editable**: Yes

- **Description**: This field allows the user to select the associated warehouse for the branch. The selected warehouse links the branch to a specific entity within the system.
- **Validation**: Required
- **Options**: Import Warehouse Name's.
  - **Source**: Warehouse Master.

- **Brand**
  - **Type**: Dropdown (Select)
  - **Label**: "Select Brand"
  - **Editable**: Yes
  - **Description**: This field allows the user to select the associated brand for the branch. The selected brand links the branch to a specific entity within the system.
  - **Validation**: Required
  - **Options**: Import Company Name's.
    - **Source**: Company Master.

- **Branch Name**
  - **Type**: Text Input (Text Editor)
  - **Label**: "Name"
  - **Editable**: Yes
  - **Description**: Input field for entering the branch's full name.
  - **Validation**:
    - **Required**: Yes
    - **Character Limit**: 50 characters
    - **Allowed Characters**: Letters, spaces, and special characters (e.g., apostrophes).

- **Branch Short Name**
  - **Type**: Text Input (Text Editor)
  - **Label**: "Short Name"
  - **Editable**: Yes
  - **Description**: Input for an abbreviated name of the branch.
  - **Validation**: Required, limited to 10 characters.
    - **Required**: Yes

- **Character Limit**: 10 characters
- **Allowed Characters**: Uppercase letters only (e.g., CBJ-AMP)

○ **Currency Type**

- **Type**: Dropdown
- **Label**: Currency Type
- **Editable**: Yes
- **Description**: Select the currency used in transactions related to this branch.
- **Validation**: Required
- **Options**: Import Currency Name's.
    - **Source**: Currency Master

○ **Logo**

- **Type**: Dropdown
- **Label**: Logo
- **Editable**: Yes
- **Description**: Specify the logo used for the branch.
- **Validation**: Required
- **Options**: "Add New", "Use Company", "Use Brand"

○ **Upload Logo**

(Visible only if "Add New" is selected in **Logo**)

- **Type**: File Upload
- **Label**: Upload Logo
- **Editable**: Yes
- **Description**: Allows uploading a custom logo for the branch.
- **Validation**: Required if "Add New" is chosen in the Logo dropdown.

○ **Select Brand Logo**

(Visible only if "Use Brand" is selected in **Logo**)

- **Type**: Dropdown
- **Label**: "Select Brand Logo"

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- **Editable**: Yes
- **Description**: Allows selecting a logo associated with a brand.
- **Validation**: Required if "Use Brand" is chosen.
- **Options**: Import Brand Name.
  - **Source**: Brand Master

- **Static IP/Mac ID**
  - **Type**: Text Input (Text Editor)
  - **Label**: Static IP / Mac ID
  - **Editable**: Yes
  - **Description**: Enter the static IP or MAC ID associated with this branch.
  - **Validation**: Optional but must follow IP or MAC ID format if entered.

- **Taxation Type**
  - **Type**: Dropdown (Multi-selection)
  - **Label**: Taxation Type
  - **Editable**: Yes
  - **Description**: Select applicable taxation types for the branch.
  - **Validation**: Required, must select at least one option.
  - **Options**: Import Tax Name's.
    - **Source**: Tax Master table
  - **Behavior**: Displays specific input fields based on selected taxation type (e.g., GST Number and VAT Number fields).

- **Dynamic Taxation Labels**
  (Visible based on the selected taxation type, e.g., GST, VAT)
  - **GST Number**
    - **Type**: Text Input
    - **Label**: GST Number
    - **Editable**: Yes
    - **Validation**: Mandatory if GST is selected.
  - **VAT Number**
    - **Type**: Text Input
    - **Label**: VAT Number

- **Editable**: Yes
- **Validation**: Mandatory if VAT is selected.

- **Address**
  - **Type**: Text Input (Text Editor)
  - **Label**: Address
  - **Editable**: Yes
  - **Description**: Full address of the branch.
  - **Validation**: Required
- **Zip Code**
  - **Type**: Dropdown
  - **Label**: Zip Code
  - **Editable**: Yes
  - **Description**: Select the zip code for the branch's location.
  - **Options**: Import Zip Code.
    - **Source**: Zip Code Master
- **Area**
  - **Type**: Dropdown
  - **Label**: Area
  - **Editable**: Yes
  - **Description**: Select the area in which the branch is located.
  - **Options**: Import Area.
    - **Source**: Area Master
- **City**
  - **Type**: Dropdown
  - **Label**: City
  - **Editable**: Yes
  - **Description**: Select the city associated with the branch location.
  - **Options**: Import City.

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- **Source**: City Master

- **District**
  - **Type**: Dropdown
  - **Label**: District
  - **Editable**: Yes
  - **Description**: Select the district of the branch.
  - **Options**: Import District.
    - **Source**: District Master
- **State**
  - **Type**: Dropdown
  - **Label**: State
  - **Editable**: Yes
  - **Description**: Select the state associated with the branch.
  - **Options**: Import State.
    - **Source**: State Master
- **Country**
  - **Type**: Dropdown
  - **Label**: Country
  - **Editable**: Yes
  - **Description**: Select the country of the branch.
  - **Options**: Import Country
    - **Source**: Country Master
- **E-Mail ID**
  - **Type**: Text Input (Text Editor)
  - **Label**: E-Mail ID
  - **Editable**: Yes
  - **Description**: Enter the branch email ID for communication.
  - **Validation**: Optional

- **Criteria**: If provided, the input must be in a valid email format.

- **Phone Number**
  - **Type**: Text Input (Text Editor)
  - **Label**: Phone Number
  - **Editable**: Yes
  - **Description**: Primary contact number for the branch.
  - **Validation**: Optional
  - **Criteria**: If provided, the input must be in a Numeric format.

- **Phone Number 1**
  - **Type**: Text Input (Text Editor)
  - **Label**: Phone Number 1
  - **Editable**: Yes
  - **Description**: Secondary contact number, if available.
  - **Validation**: Optional.
  - **Criteria**: If provided, the input must be in a Numeric format.

- **Status**
  - **Type**: Checkbox
  - **Label**: Is Active
  - **Editable**: Yes
  - **Default Value**: Checked (True)
  - **Behavior**:
    - **Checked**: The branch is active and visible in the system.
    - **Unchecked**: The branch is inactive but retained in the database.

- **Copy Address from Company Master Button**
  - **Type**: Button
  - **Label**: Copy Address from Company Master
  - **Editable**: No
  - **Description**: Button to copy address data from the Company Master Table.

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- **Behavior**:
  - **Validation**: Ensures only complete address data can be copied.
  - **Overwrite Warning**: Prompts the user to confirm if they want to overwrite existing address data.

- **Submit Button**
  - **Type**: Button
  - **Label**: Submit
  - **Editable**: No (Standard Button)
  - **Description**: A button that submits the filled form details to the database.
  - **Validation**:
    - Ensures all required fields are completed and validated.
  - **Behavior**:
    - If validation is successful, the form data is submitted to the database.
    - If validation fails, displays an error message indicating the fields that require correction.

- **Clear Button**
  - **Type**: Button
  - **Label**: "Clear"
  - **Editable**: No (Standard Button)
  - **Description**: Resets all form fields to default values.
  - **Validation**:
    - Not required; clearing the form does not require validation checks.
  - **Behavior**:
    - Reset Form Fields: Clears all entered data in the form fields, resetting them to their default values.
    - Confirmation Prompt: Prompts the user for confirmation to avoid accidental data loss.

- **Previous Button**
  - **Type**: Button
  - **Label**: "Previous Icon"
  - **Editable**: No (Standard Button)

- **Description**: Closes the Branch Creation Form and returns the user to the main Branch table view, discarding any unsaved changes.
- **Behavior**: Cancels any unsaved changes and navigates back.
- **Validation**:
    - **Required**: No

#### *2.5.2.5 Functional Requirements*

- **Actions**
    - **Submit Button Click**
        - **Action**: Triggers form submission if all required fields (Branch Name, Branch Short Name, and Company) contain valid values.
        - **Outcome**:
            - **Create Operation**: If it's a new entry, saves the new Branch information to the database.
            - **Update Operation**: If editing an existing entry, updates the branch information.
- **Validation**
    - **Mandatory Fields**
        - **Fields**: Branch Name, Branch Short Name, Company are required fields.
        - **Behavior**:
            - Users must enter valid 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 the "Error Messages" section).
    - **Conditional Validation**
        - **Logo Options**:
            - If "Add New" is selected for Logo, the Upload Logo field becomes mandatory.
            - If "Use Brand" is selected for Logo, the Select Brand field becomes mandatory.
        - **Taxation Type**:
            - Based on selected taxation types, related input fields (e.g., GST Number, VAT Number) must be filled.
    - **Field Format Validation**
        - **Branch Short Name**: Maximum 10 characters, letters only.

- **Static IP/Mac ID**: Must follow a valid IP or MAC address format.
- **E-Mail ID**: Must follow a valid email format.
- **Phone Number**: Numeric values only, minimum 10 digits.

- **Error Messages**
  - **Submit Attempt with Missing Values**
    - **Condition**: If one or more required fields are missing a value when the user clicks Submit.
    - **Behavior**: The system displays specific error messages indicating which field(s) are missing values.
    - **Message Examples**:
      - "Branch Name is required" if the Branch Name field is empty.
      - "Branch Short Name is required" if the Branch Short Name field is empty.
      - "Company is required" if the Company field is empty.
  - **Validation Errors**
    - **Condition**: If any field does not meet the required format or constraints.
    - **Behavior**: The system displays an error message specifying the field and the expected input.
    - **Message Examples**:
      - "Short Name cannot exceed 10 characters."
      - "Invalid IP or MAC address format in Static IP/Mac ID field."
      - "Please select a Logo option or upload a valid logo image."
- **Behavior**
  - **Successful Submission**
    - If all required fields are valid, the form data is saved in the database, and a success confirmation is displayed.
  - **Form Reset**
    - Clicking the Clear Button resets all form fields to default values after user confirmation.
  - **Navigation**
    - Clicking the Previous Button discards unsaved changes and navigates back to the Branch Table View.

#### *2.5.2.6 Data Requirements*

- **Company Data**
  - **Source**: Company Master Table
  - **Usage**: Populates the "Select Company" dropdown in the Branch Creation form.
  - **Details**: Contains a list of all companies registered in the system, enabling users to associate a warehouse with a specific company.
- **Warehouse Data**
  - **Source**: Warehouse Master Table
  - **Usage**: Populates the "Select Warehouse" dropdown in the Branch Creation form.
  - **Details**:
    - Contains a list of all warehouses registered in the system, enabling users to associate a branch with a specific warehouse.
    - Contains a list of warehouses filtered based on the selected Company.
- **Brand Data**
  - **Source**: Brand Master Table
  - **Usage**:
    - Populates the "Select Brand" dropdown in the Branch Creation form.
    - The "Select Brand" dropdown is populated when the company has multiple brands available.
  - **Details**: Contains a list of all brands.
- **Currency Data**
  - **Source**: Currency Master Table
  - **Usage**: Populates the "Currency Type" dropdown in the Branch Creation form.
  - **Details**: Contains a list of all available currency types in the system, allowing users to define the currency applicable to the branch.
- **Logo Options**
  - **Source**: User Input, Company Master, or Brand Master
  - **Usage**: Determines the source of the logo for the branch.
  - **Details**:

- Users can choose to upload a new logo, use the company logo, or select a logo from an associated brand.

- **Taxation Data**
  - **Source**: Tax Master Table
  - **Usage**: Populates the "Taxation Type" multi-select dropdown in the Branch Creation form.
  - **Details**:
    - Contains a list of all applicable taxation types (e.g., GST, VAT).
    - Dynamically updates visible fields (e.g., GST Number, VAT Number) based on selected taxation types.
- **Address Data**
  - **Source**: User Input
  - **Usage**: Captures the branch address details including zip code, area, city, district, state, and country.
  - **Details**: Address-related fields dynamically populate based on selected options from master tables.
- **Zip Code Data**
  - **Source**: Zip Code Master Table
  - **Usage**: Populates the "Zip Code" dropdown in the Branch Creation form.
  - **Details**: Contains a list of zip codes associated with the selected area.
- **Area Data**
  - **Source**: Area Master Table
  - **Usage**: Populates the "Area" dropdown in the Branch Creation form.
  - **Details**: Contains a list of areas filtered based on the selected city.
- **City Data**
  - **Source**: City Master Table
  - **Usage**: Populates the "City" dropdown in the Branch Creation form.
  - **Details**: Contains a list of cities filtered based on the selected district.
- **District Data**
  - **Source**: District Master Table
  - **Usage**: Populates the "District" dropdown in the Branch Creation form.

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- **Details**: Contains a list of districts filtered based on the selected state.

- **State Data**
  - **Source**: State Master Table
  - **Usage**: Populates the "State" dropdown in the Branch Creation form.
  - **Details**:
    - Contains a list of states available in the system.
    - Dynamically filters based on the selected country.

- **Country Data**
  - **Source**: Country Master Table
  - **Usage**: Populates the "Country" dropdown in the Branch Creation form.
  - **Details**: Contains a complete list of countries in the system, used to filter states dynamically.

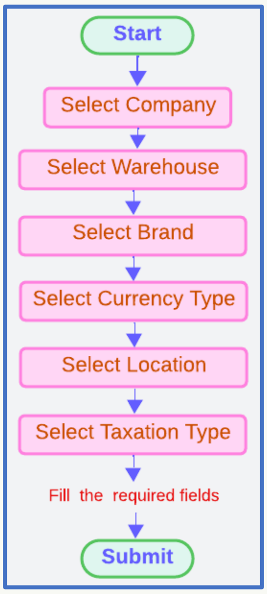
#### *2.5.2.7 Non-Functional Requirements*

None.

#### *2.5.2.8 Configurations*

None.

#### *2.5.2.9 Flowchart*




#### *2.5.2.10 Additional Notes*

None.

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### 2.5.3 Update Branch

#### *2.5.3.1 Purpose*

The Branch Edit section allows authorized users to modify existing branch records to maintain accurate and up-to-date information. This ensures that the ERP system remains aligned with evolving operational requirements, international standards, and business needs.

#### *2.5.3.2 User Type*

Registered Users, Admins.

#### *2.5.3.3 Screen Layout*

Same Create Branch layout.

#### *2.5.3.4 UI Elements*

Same Create Branch Elements.

#### *2.5.3.5 Functional Requirements*

- **Initiate Update Process**
  - **Description**: The update process begins when the user clicks the Edit button in the Action column of the branch table.
  - **Functionality**:
    - **Edit Button Action**:
      - Loads the selected branch's existing details (e.g., Company, Warehouse, Brand, Name, Short Name, Address, Logo, etc.) into the Branch Creation Form.
      - Pre-populates all form fields with the current values of the selected branch record to enable editing.
  - **Expected Outcome**: The Branch Creation Form is populated with the selected branch's current data, ready for modification.
- **Modify Branch Details**
  - **Description**: Allows users to edit one or more fields of the branch record, such as Name, Address, Currency Type, and more.
  - **Fields Available for Update**:
    - **Company**: Modify the associated company.
    - **Warehouse**: Change the associated warehouse.

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- **Brand**: Change the associated brand. If the company has multiple brands available.
- **Name**: Update the full name of the branch.
- **Short Name**: Change the abbreviated name for the branch.
- **Currency Type**: Update the selected currency type.
- **Logo**: Modify the logo, or upload a new one, based on the selected option (e.g., "Use Brand," "Use Company").
- **Address**: Update the full address, including Country, State, District, City, and Area.
- **Static IP/Mac ID**: Update the branch's static IP or Mac ID.
- **Taxation Type**: Modify taxation details and corresponding entries (e.g., GST Number, VAT Number).
- **Contact Information**: Update E-Mail ID, Phone Number, and Phone Number-2.
- **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:
      - **Company**
      - **Warehouse**
      - **Branch Name**
      - **Short Name**
    - **Specific Field Validation**:
      - **Branch Name**: Up to 50 characters, allows letters, spaces, and certain special characters.
      - **Short Name**: 2 to 3 uppercase letters.
      - **Currency Type**: Must select an option from the dropdown.
      - **Address Fields**: Valid options must be selected for Country, State, District, City, and Area.
    - **Error Handling**: If validation fails, display specific error messages to guide the user, such as:

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        - "Branch Name is required."
        - "Short Name must be 2-3 uppercase letters."
        - "Currency Type must be selected."
  - **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 branch details to the database and refreshes the branch table to reflect the changes.
      - Displays a success message confirming the update, such as: "Branch details have been successfully updated."
  - **Expected Outcome**: The updated branch 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 branch 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 branch 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: "Branch details have been successfully updated."
  - **Expected Outcome**: The confirmation message assures the user that the updated data has been saved successfully.

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#### *2.5.3.6 Data Requirements*

None.

#### *2.5.3.7 Non-Functional Requirements*

None.

#### *2.5.3.8 Configurations*

None.

#### *2.5.3.9 Flowchart*

None.

#### *2.5.3.10 Additional Notes*

None.

### 2.5.4 Remove Branch

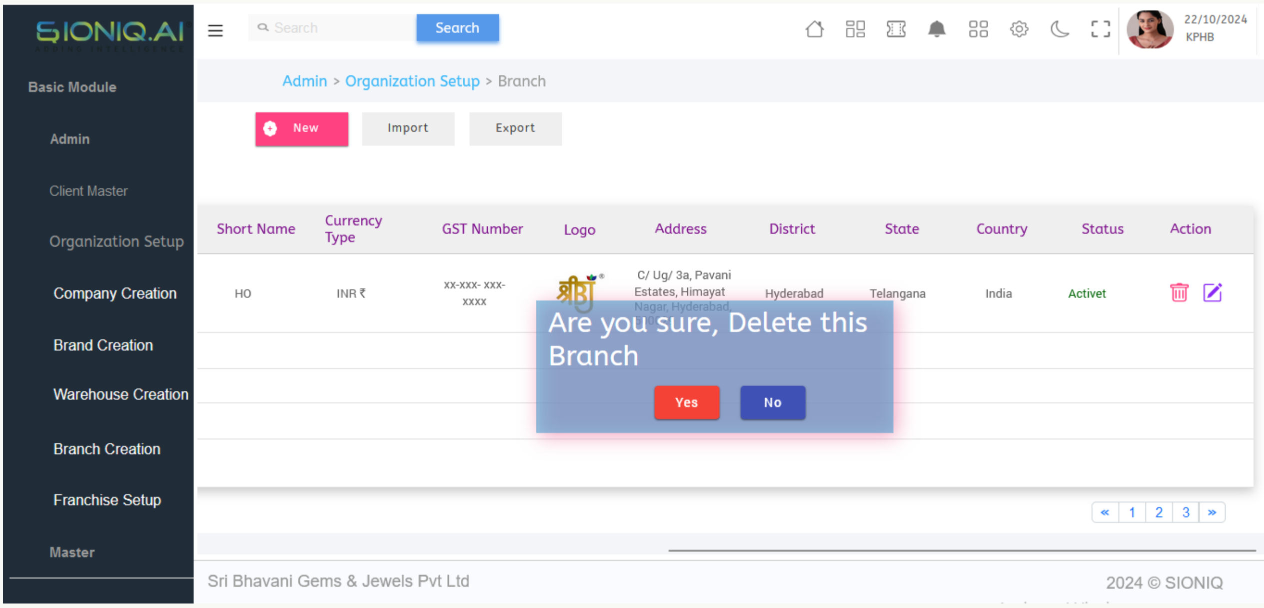
#### *2.5.4.1 Purpose*

The Branch Remove functionality allows authorized users to delete existing branch records from the system. This feature ensures that obsolete or incorrect branch data can be effectively managed, supporting accurate record maintenance and operational efficiency. The deletion process is permission-controlled and includes safeguards such as a confirmation prompt to prevent accidental removal of critical data.

#### *2.5.4.2 User Type*

Registered Users, Admins.

### *2.5.4.3 Screen Layout*




### *2.5.4.4 UI Elements*

None.

### *2.5.4.5 Functional Requirements*

- **Access Control**
  - **Purpose**: Ensure that only authorized users can perform the delete operation for branches.
  - **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 branch 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 branch?"**
    - **Options**:
      - **Yes**: Confirms the deletion and proceeds with removing the branch record.
      - **No**: Cancels the delete action without making any changes.
    - **Expected Outcome**: The branch record is deleted only when the user confirms by selecting Yes.
- **Delete Execution**
  - **Description**: After confirmation, the system marks the branch record as deleted in the database.
  - **Functionality**:
    - **Data Removal**:
      - Updates the selected branch record's status to **"Status=0"** in the database.
    - **Dependencies Check**:
      - Before deletion, the system checks for any dependencies (e.g., associated transactions, inventory, or linked entities).
      - **If dependencies exist**:
        - Displays a message:
          - **"Cannot delete branch 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**:

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- Upon successful deletion, display a success message such as:
  - **"Branch has been successfully deleted."**
- **Expected Outcome**: The user receives confirmation that the record was deleted.

- **Refresh Table View**
  - **Description**: Updates the branch table view to reflect the changes made by the deletion.
  - **Functionality**:
    - **Refresh Table**:
      - Automatically removes the deleted branch 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.

#### *2.5.4.6 Data Requirements*

None.

#### *2.5.4.7 Non-Functional Requirements*

None.

#### *2.5.4.8 Configurations*

None.

#### *2.5.4.9 Flowchart*

None.

#### *2.5.4.10 Additional Notes*

*None.*

## 2.6 Franchise