making science

WE ARE AGENTS OF CHANGE

Client Hub

Functional Specifications

Date:

01.08.2024

Prepared For:

Heidelberg Georgia

Recent Clients

57- 61 Mortimer St, London

Calle López de Hoyos 135, Madrid

Corso Magenta 42, Milano

31 Avenue de l'Opéra, Paris

Box 3061, Stockholm

Tamarashvili st. 13, Tbilisi

1. TABLE OF CONTENTS

2. SCOPE

3. INTRODUCTION

3.1. Document purpose

The purpose of this document is to describe functional specifications of an Application completely, accurately and unambiguously in a Technology-independent manner. All attempts have been made in using mostly business terminology and business language while describing the requirements in this document. Very minimal and commonly understood Technical terminology is used.

3.2. Intended audience

- Business owners
- Tech. team
- Product team
- Other stakeholders of the project

3.3. Document revisions

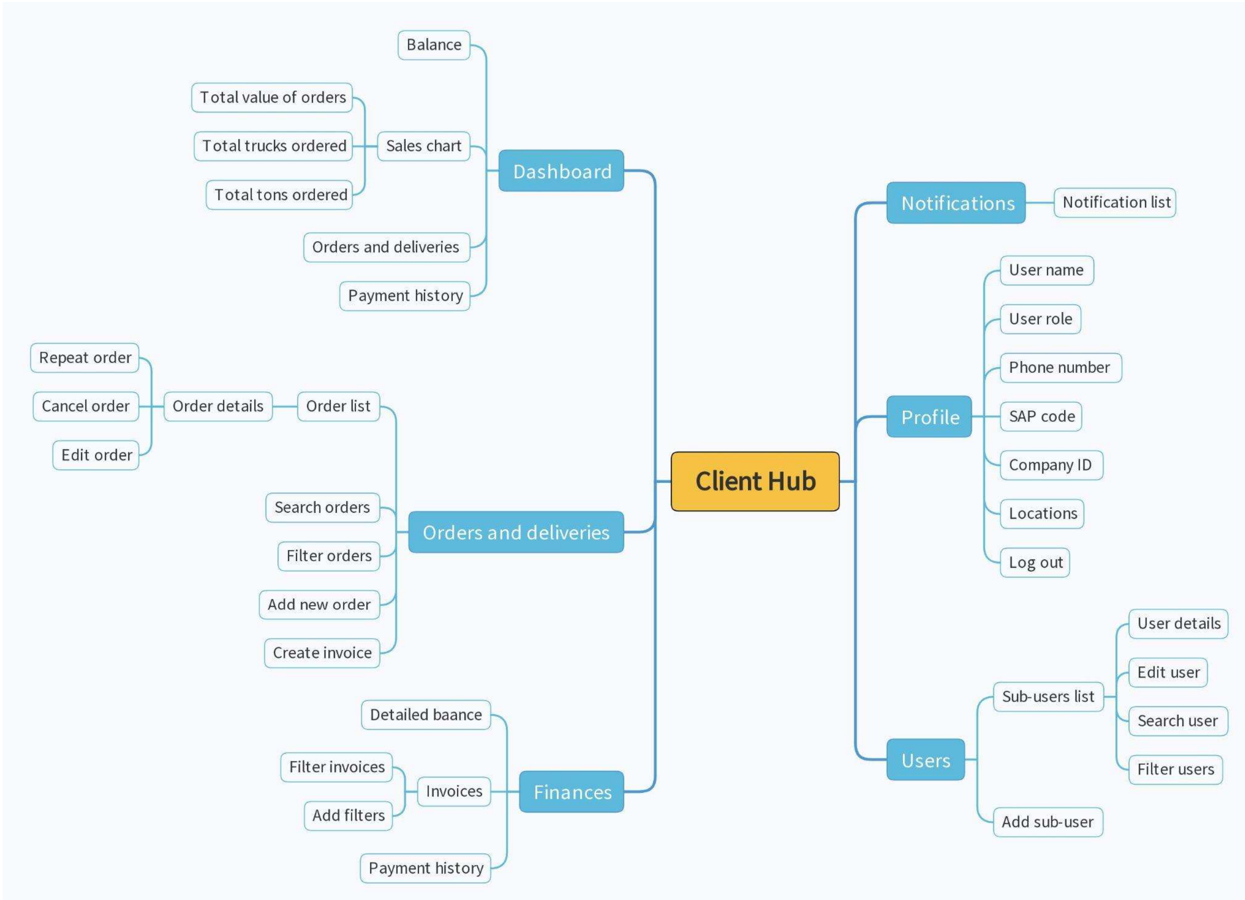
Date	Version Number	Document Changes
01.08.2024	1.0	First Version • Basic structure of the document defined • Basic functionalities described
09.09.2024	1.1	Second version • Changed based on the design updates

3.4. Definition and acronyms

Keyword	Description
OTP	One time password
User	Employer of the Heidelberg who has access to the Admin panel
customer	Client of the Heidelberg who has access to the client hub

4. FUNCTIONAL SPECIFICATIONS

4.1. Sitemap



4.2. Registration

4.2.1. Stakeholder requirements:

#	Requirement	Type

001	Customer should fill a form to initiate registration	Functional
002	Customer should be a SAP user in order to register in the system	Non-functional
003	Customer should complete registration by opening a registration link (link is sent in his/her email)	Functional
004	Customer should create password during registration	Functional
005	Customer should confirm the phone number via OTP (one-time-password) during the registration	Functional
006	System should get customer data (for the last 12 months) from SAP system automatically after new account is created	Non-functional

4.2.2. Pages

- Registration form
- Success page - when registration form is successfully sent
- Registration form errors:
  - One or more input field is empty
- Enter OTP (after user clicks registration link)
- OTP errors:
  - OTP has expired
  - OTP is entered incorrectly
- Create password (after user clicks registration link)
- Password is successfully created
- Create password Errors:
  - Passwords do not match
  - Password is too short (less than 6 symbols) or too long (more than 32 symbols)

4.2.3. Description

Registration is initiated when a customer navigates to the company's webpage (cement.ge) and clicks "Register as contractor". System will open new page and display registration form with following elements:

- First name - input field (mandatory)
- Last name - input field (mandatory)
- Email - input field (mandatory)
- Phone number - input field (mandatory)
- Company name - input field (mandatory)

- TAX ID
- “Send” button - to send the form;

After a customer clicks “Send”, the registration form will be sent to the sales department. The information that was provided by the customer, will be checked (manually) to confirm that the customer is indeed the user of the SAP system; Only upon confirmation will the registration link be sent to the customer’s email address.

After the customer clicks the registration link, he/she will be redirected to the new page and asked to enter OTP that was sent to their phone number;

- OTP is sent to the phone number as soon as customer clicks on the confirmation link
- OTP will expire after 1 minute
- OTP can be re-sent after 1 minute
- Customer should enter OTP and click “Confirm” to proceed
- System will check whether the OTP is entered correctly

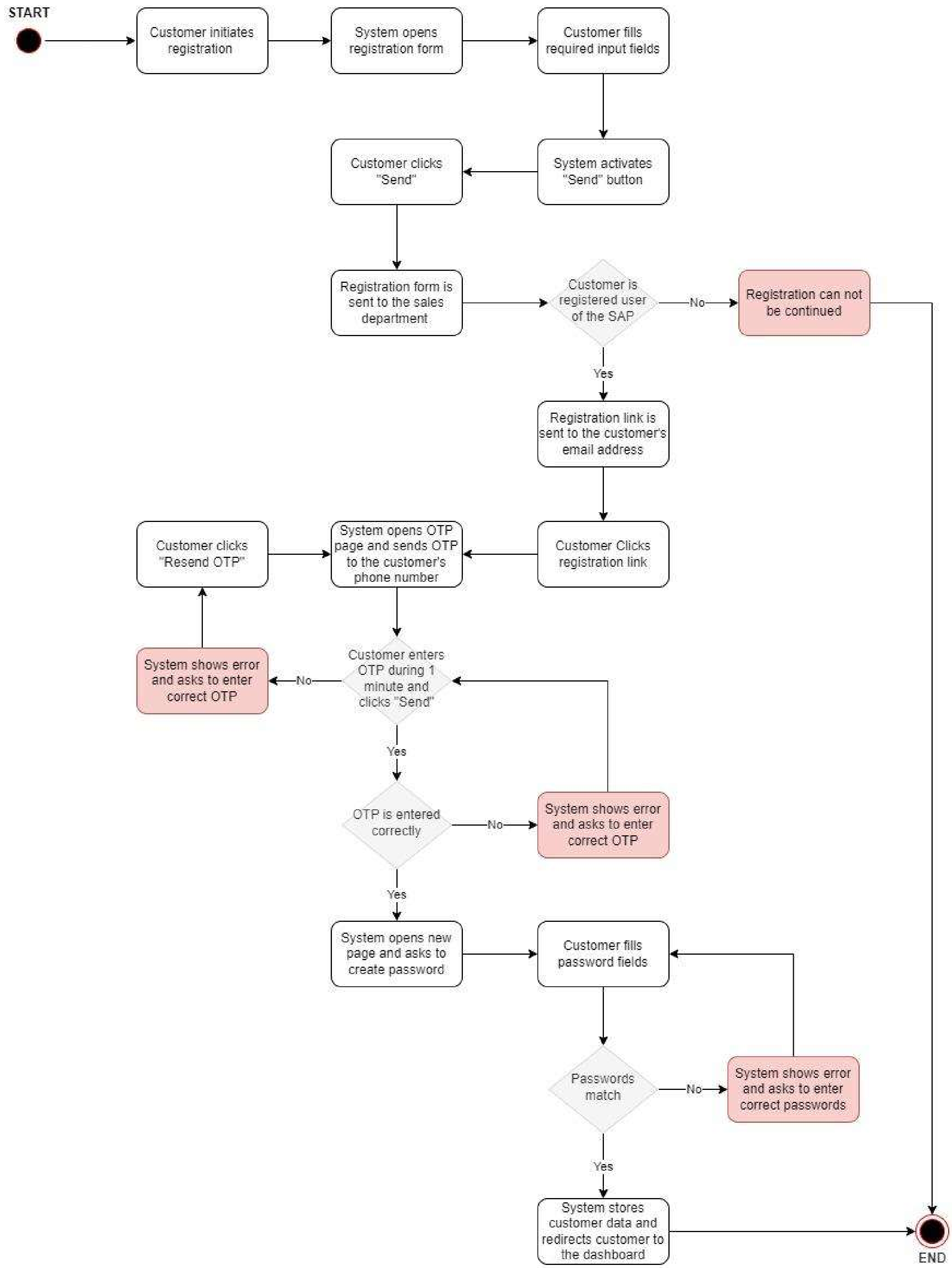
When OTP is entered correctly, customer will be redirected to the next page and asked to agree on terms and conditions and create password:

- System should show terms and conditions page first;
    - Customer should be redirected to the password creation page only after he/she agrees to terms and conditions;
- Password should be minimum 6 characters (& 32 characters max)
- Password can contain any letter or number
- Customer should repeat password
- Customer should click “Create password” in order to proceed
- System should check if passwords match each-other (after customer clicks “Create password)

When password is successfully created, system will show success page and redirect customer to the dashboard;

NOTE*: when new account is created, system should get customer data from SAP system automatically and display it in the customer’s dashboard;*

Diagram - Customer registration [Source]


START
Customer initiates registration
System opens registration form
Customer fills required input fields
System activates "Send" button
Customer clicks "Send"
Registration form is sent to the sales department
Customer is registered user of the SAP
No
Registration can not be continued
Yes
Registration link is sent to the customer's email address
Customer Clicks registration link
System opens OTP page and sends OTP to the customer's phone number
Customer clicks "Resend OTP"
Customer enters OTP during 1 minute and clicks "Send"
No
System shows error and asks to enter correct OTP
Yes
OTP is entered correctly
No
System shows error and asks to enter correct OTP
Yes
System opens new page and asks to create password
Customer fills password fields
Passwords match
No
System shows error and asks to enter correct passwords
Yes
System stores customer data and redirects customer to the dashboard
END

4.3. Authorization

4.3.1. Stakeholder requirements

N	Requirement	Type
001	Customer should sign in using email & password	Functional
002	Customer should sign in using 2FA (two-factor authentication)	Functional
003	Customer should be blocked for 30 minutes after 5 unsuccessful authorization attempt	Non-functional

4.3.2. Pages

- Authorization page (email & password fields)
- Authorization errors:
  - Email is not correct (e.g. account with this email does not exist)
  - Password is not correct
  - Account is blocked (try again in 30 minutes)
- OTP confirmation page (Enter OTP that was sent to phone number)
- OTP errors:
  - OTP is not correct
  - OTP has expired

4.3.3. Description

Authorization is initiated once user navigates to the authorization page (www.123.ge);
Authorization page will display:

- Input field for the email address
- Input field for the password
- Customer should provide email address and password
- Customer should click “Sign in” in order to proceed
- System will check if entered email address is correct
- System will check if entered password is correct
- System will block customer for 30 minutes after 5 unsuccessful authentication attempt;

  **NOTE*: unsuccessful authentication attempt is an attempt where email is correct & password is wrong. Block is initiated after 5 consecutive wrong attempts;*

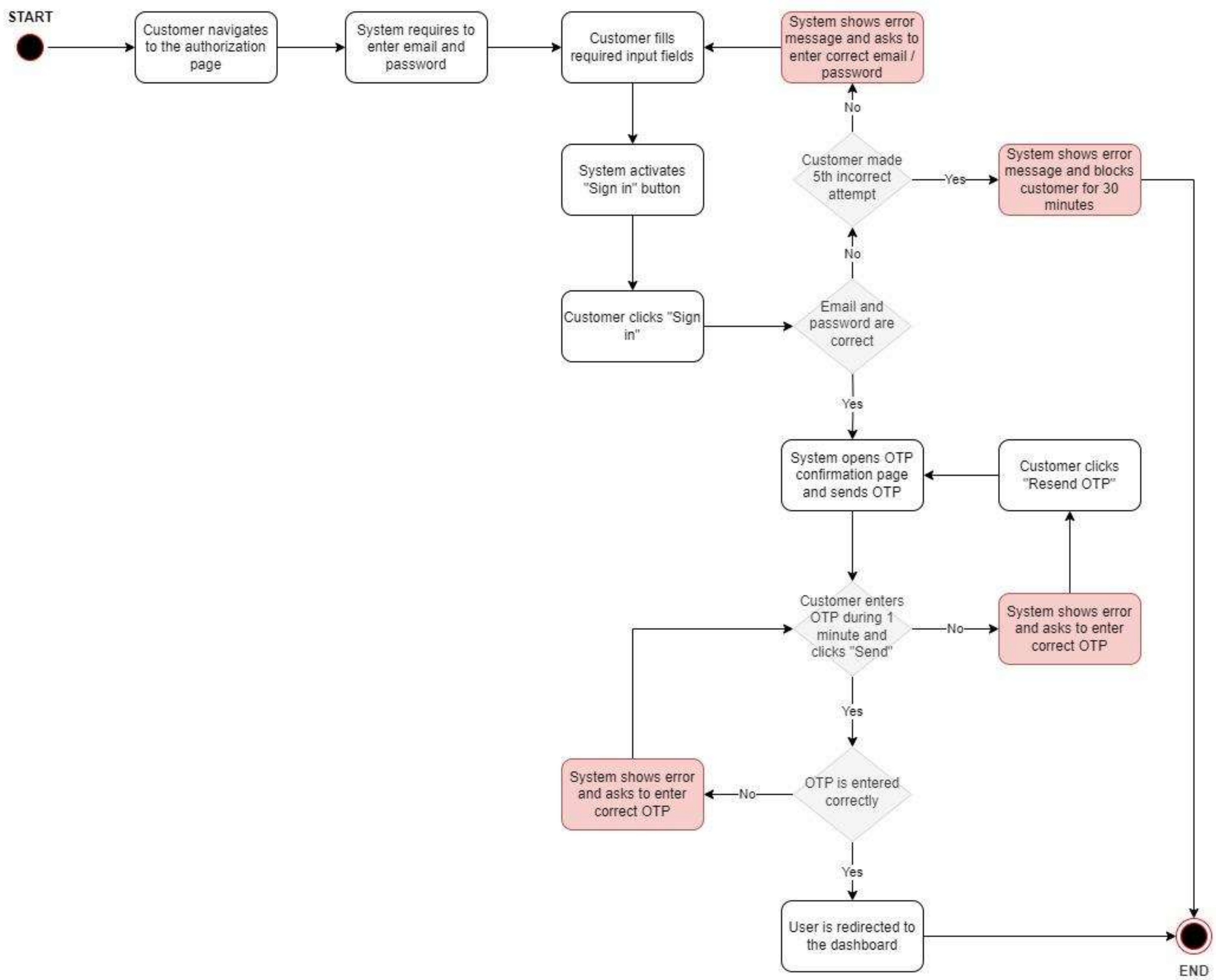
When email and password are entered correctly, the system will redirect customer to the OTP confirmation page and will send OTP to the customer’s phone number.

- OTP is sent automatically after customer is redirected to the OTP confirmation page
- OTP will expire in 1 minute
- OTP can be resent after 1 minute

- Customer should enter OTP in the corresponding input field and click “SIgn in”
- System should check if OTP is entered correctly;

When OTP is entered correctly, the customer will be authorized and redirected to the dashboard.

Diagram - authorization[Source]



4.4. Password Reset

4.4.1. Stakeholder requirements

N	Requirement	Type
001	Customer should call or send an email in order to indicate the desire to reset password	Non-functional
002	Customer should receive password reset link via email	Non-functional
003	Customer should create new password via opening the link that was sent to them;	Functional

4.4.2. Pages

- Create new password (“enter password” & “repeat password” input fields)
- Password is successfully created
- Create password Errors:
  - Passwords do not match
  - Password is too short (less than 6 symbols) or too long (more than 32 symbols)

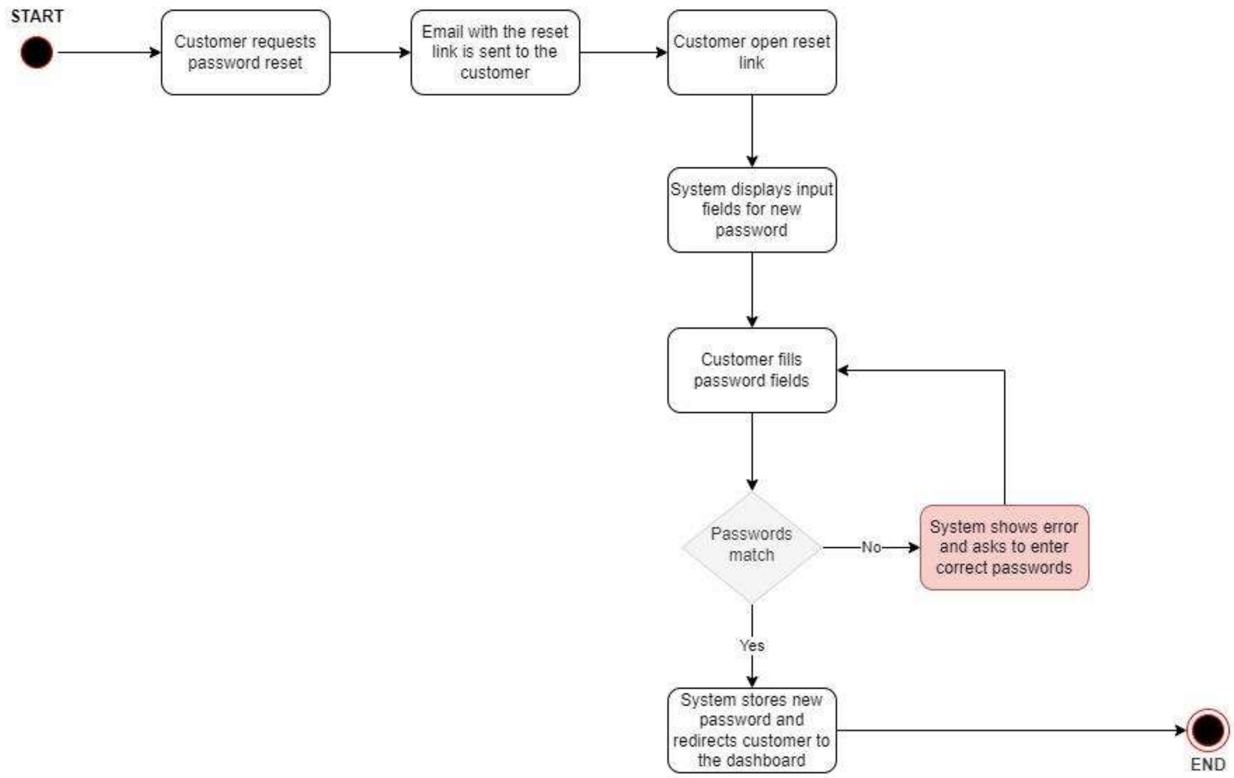
4.4.3. Description

Password reset can be initiated when customer calls to the company’s corporate number or sends an email indicating that he/she needs to reset the password.

- A password reset link is sent to the customer’s email address
- Customer should click the link in order to initiate password reset
- Customer should provide new password
- Customer should repeat new password
- Customer should click “Reset” to proceed
- System should check that passwords match each-other
- System should check that passwords match requirements (min. 6 symbols & max. 32 symbols)

When the password is successfully reset, the system will redirect customer to the dashboard page.

Diagram - password reset [Source]


START
Customer requests password reset
Email with the reset link is sent to the customer
Customer open reset link
System displays input fields for new password
Customer fills password fields
Passwords match
No
System shows error and asks to enter correct passwords
Yes
System stores new password and redirects customer to the dashboard
END

4.5. Dashboard

4.5.1. Stakeholder requirements

N	Requirement	Type
001	Dashboard should be displayed when customer signs in	Functional
002	Dashboard should show data from SAP	Non-functional
003	Dashboard should show the charts based on the user's orders	Functional
004	Dashboard should show last 5 order from the orders and deliveries	Functional
005	Customer should be able to change dashboard language (GEO/EN)	Functional
006	Dashboard should show last 3 payment from the payments history	Functional

4.5.2. Pages

- Dashboard page
    - Balance
    - Sales chart
        - Total value of orders
        - Total trucks ordered
        - Total tons ordered
    - Orders and deliveries
    - Payment history

4.5.3. Description

Dashboard page is displayed as soon as a customer signs in his/her profile. Dashboard will show following information:

- Notification icon
- Profile icon
    - Full name
    - Role
    - Phone number
    - SAP code

    - Company ID (is obtained from SAP)
    - Destinations - regions where certain products are shipping to
        - ***NOTE****: SAP creates delivery address - location code and name ("2950088 ქუთაისი, ჭავჭავაძის 6"). Addresses will not be recorded or processed without prior agreement and registration;*
- Company's balance
    - Balance left
    - Overall available amount
- Customer's sales manager's contact information - phone number / email address
- Invoice department's email addresses
    - Email address can be clicked;
    - Upon clicking the email, writing new email should be initiated;
- Sales chart:
    - Total Value of Orders
    - Total Trucks Ordered
    - Total Tons Ordered
- Last 5 order from the order history
- Payment history
    - Last 3 payment

Order statuses will be described in more details in the paragraph ORDERING

4.6. Ordering

4.6.1. Stakeholder requirements:

#	Requirement	Type
001	Customer should not be able to place an order in case of the insufficient balance	Functional
002	The customer should only have the option to select products that are listed in the contract.	Functional
003	Administrator (Admin Panel) should be able to change delivery date and dispatch location/factory of the order	Functional
004	Customer should get SMS and web notifications on order status updates ● Customer should get SMS only once when the truck leaves the factory, ● Customer should get Web notifications for each status update of the order	Functional
005	Customer should be able to monitor the order location in real time using map (via dedicated link)	Functional
006	System should register new order for each car/vehicle that will be selected by the customer (**Only for Bulk cement)**	Functional
007	Customer should be able to see reminders/notifications on guarantees and consignations	Functional
008	Customer should be able to initiate order cancelation In Client hub when the order status is “Pending” ● Cancelation request is sent to SAP	Functional
009	Customers should see a info message in client hub in case SAP system is shut down	Functional
010	System should be able to send “Pre-order data” (e.g. Pre-Order document) to the SAP after user saves new order	Non-functional
011	System should be able to recalculate balance via updates from SAP, according to the pre-order data (SAP sends updated balance after pre-order data and after quotation of the weight - actual weight)	Non-functional
012	SAP should be able to identify internal orders (Via ship-to codes)	Non-functional
013	Customer should be able to repeat order	Functional

014	Customer should be able to see Driver & Truck details in the Bulk cement order after order status changes to “Initial weighing”	Functional

4.6.2. Pages

- Order list
- Order details (opens after customer clicks any order in the list)
- New order page (different fields for Bulk / Bag / Clinker)
- Edit order (when administrator edits order details in the admin panel)

4.6.3. Description

4.6.3.1. View order list

In order to view the order list, internal user (e.g. Administrator of the admin panel) should be authorized in the system, should navigate to the nav-bar and click “Orders”. System will open new page and display the list of orders with following columns / elements:

- Order date
- Order ID
- Order destination
- Product type - Bag/Bulk/Clinker
- Order weight
- Order status
    - pending
    - confirmed
    - rejected
    - initial weighting
    - goods issued
    - delivered
    - canceled
- SAP sales order number (after order is approved by logistics)
- RS delivery number
- Filter options:
    - Filter by order status (pending / confirmed / Initial weighing / Goods Issued / delivered / canceled / Rejected)
    - Filter by cement type (Bag / Bulk / Clinker)
    - Filter by order initiation date
    - Filter by order delivery date
    - Filter by order weight
    - Filter by material name

- Filter by delivery method: Pick-up or delivery;
- Filter by Driver ID
- Filter by Truck plate number
- Search bar
- Buttons
  - "New order"
  - "Generate invoice"

4.6.3.2. Order details

In order to view order details, customer should navigate to the order list and click any order. System will open a new window and display following details:

- Order date
- Order ID
- Order destination
- Product type - Bag/Bulk/Clinker
- Order weight
- Order total value
- Order status
  - pending
  - confirmed
  - rejected
  - initial weighting
  - goods issued
  - delivered
  - canceled
- Material types
- SAP sales order number (after order is approved by logistics)
- RS delivery number (only after initial weighing)
- Map (only for delivery method)

4.6.3.3. Order Bulk cement

When customer selects product type - Bulk cement - system will require to:

- ➢ Select delivery method: Pick-up or Delivery (Selecting the delivery method is not required if the customer has only one delivery option;)

- ➢ Pick-up
  - ➢ <u>If selected Pick-up, customer should select:</u>
  - Truck plate number
  - Trailer plate number

- ○ Driver full name
- ○ Driver ID number
- ○ Delivery destination (e.g. ship-tos received from SAP)
  - ■ Only one location per truck
- ○ Select material type *(only 1 type per truck)*
- ○ **Quantity(max: 40 t)**
- ○ Add comment (optional)
- ○ Click “Create Order”

*** Pick-up does not require to select delivery date**
Pick-up allows to select only one truck

➢ Delivery

- ➢ <u>If selected Delivery, customer should select:</u>
- ○ Material type *(only 1 type per truck)*
- ○ Delivery destinations *(e.g. ship-tos received from SAP)*
  - ■ Only one location per truck
- ○ **Number of trucks**
  - ■ **NOTE: truck & driver details are empty until order status changes to “Initial weighing”. After the status change, System will also get Truck plate numbers and driver name / ID numbers from SAP**
  - ■ **System will display full order Quantity (max: 37t per truck)**
- ○ Delivery date
  - ■ **Date can be selected starting with the next day and further in the calendar**
- ○ Add comment (optional)
- ○ Click “Create Order”

**** NOTE: System will check if customer has sufficient funds for the purchase (Balance data is received from SAP). If available balance is insufficient, system will show error message and ask to try purchasing a different amount of products***

- ***After showing the error message, the input fields that were filled will remain the same unless the user navigates to another page;***

If available balance is sufficient - system will save the order and send Pre-order data document to the SAP (SAP will recalculate the balance according to the received Pre-order data and send back to the system);

Orders are saved with the status “Pending”. New order becomes visible for the customer and for the administrator in the admin panel. The order must be approved by the administrator:

- Administrator (logistics) can change the order's delivery date, number of trucks or dispatch factory;

- Administrator can reject order;
- Approved & edited orders are sent to SAP;
- Customer gets web notification after orders is approved or edited by the logistics department;

After an order is processed in SAP, the truck starts loading and the customer will be able to monitor the location on the map. When the order is delivered, the status of the order will be changed to “Delivered”;

4.6.3.4. Order Bag cement

When customer selects product type - Bag cement - system will require to:

- Select number of pallets (for both - Pick up and delivery)
  - Minimum amount is 1 pallet (2 tons) and maximum amount is 20 pallets (40 tons)
- Enter truck details:
  - truck plate number
  - trailer plate number
  - Driver full name
  - Driver ID number
  - Delivery destination (e.g. ship-tos received from SAP)
    - Only one location per truck
- Select material type
  - Max 2 types
- ***Selecting delivery date is not required for Bag cement***
- ***Selecting delivery method is not required for Bag cement***
- Add comment (optional)
- Click “Create Order”

**** NOTE: System will check if customer has sufficient funds for the purchase (Balance data is received from SAP). If available balance is insufficient, system will show error message and ask to try purchasing a different amount of products***

- ***After showing the error message, the input fields that were filled will remain the same unless the user navigates to another page;***

if available balance is sufficient - the order will be directly sent to SAP (Bag cement orders does not need to be confirmed by the logistic department)

New orders are saved with the status “Pending”. New order becomes visible for the customer and for the administrator in the admin panel. After an order is processed in SAP, the truck starts loading and the customer will be able to monitor the location on the map. When the order is delivered, the status of the order will be changed to “Delivered”;

4.6.3.5. Order Clinker

When customer selects product type - Clinker - system will require to:

- Select product
- Select Destination
- Select quantity
- Select truck & driver details:
    - Truck plate number
    - Trailer plate number
    - Driver full name
    - Driver ID number
    - Delivery destination (e.g. ship-tos received from SAP)
        - Only one location per truck
- **System will display full order Quantity (max: 37t per truck)**
- ***Selecting delivery method is not required for Clinker (Pick-up is the only option for Clinker)***
- ***Selecting delivery date is not required for Clinker***
- Add comment (optional)
- Click “Create Order”

**** NOTE: System will check if customer has sufficient funds for the purchase (Balance data is received from SAP). If available balance is insufficient, system will show error message and ask to try purchasing a different amount of products***

- ***After showing the error message, the input fields that were filled will remain the same unless the user navigates to another page;***

if available balance is sufficient - the order will be directly sent to SAP (Clinker orders does not need to be confirmed by the logistic department)

New orders are saved with the status “Pending”. New order becomes visible for the customer and for the administrator in the admin panel. After an order is processed in SAP, the truck starts loading and the customer will be able to monitor the location on the map. When the order is delivered, the status of the order will be changed to “Delivered”;

4.6.3.6. Generate invoice

Generating an invoice can be initiated after the customer is navigated into his/her account and clicks “Generate invoice”. When the “Generate invoice” button is activated, the system will open a new window and display the same page as the “create order” page. After filling desired input fields, the customer can click “Download PDF” and save the invoice as a pdf file.

4.6.4. Use case - Ordering

Actors:

- Customer,
- System (e.g. client HUB),
- HUB administrator,
- SAP

Pre-conditions:
- Customer is signed in, has navigated to the orders page and wants to purchase items by creating a new order

Post conditions:
- Customer has successfully made a purchase;

Normal Flow:
1. Customer clicks "New order"
2. System opens new window
3. Customer selects product type - Bulk AF001.1 AF001.2
4. Customer selects delivery method - Delivery AF001.3
5. Customer selects product type (only 1 type per truck)
6. Customer selects ship-to destination
    a. ***The request to get ship-to destinations is sent to SAP and SAP returns the list of destinations***
    **** NOTE****: delivery locations are predefined for each customer according to the contract*
7. Customer selects the number of cars (trucks) for loading
    a. 40 vehicles/trucks max for current day
8. Customer selects delivery date (starting with the next day and further)
9. System displays order's total cost (calculated according to the price, quantity and delivery cost)
10. Customer fills comment field (optional)
11. Customer clicks "Create order"
12. System checks if customer has sufficient balance (e.g. available balance) for opening the order AF001.4
13. System saves new order with the status "Pending" AF001.5
14. System sends Pre-order data to SAP
15. System sends web notification to the customer informing that the order has been received
16. System recalculates customer balance according to the new order's total cost data, received from SAP
17. System displays New order in the administrator's "Orders" page (in the admin panel of the client hub)
18. Administrator approves new order and clicks "Approve" AF001.6 AF001.7
19. System saves order with status "Approved"
20. System sends order data to SAP

   a. System displays order details in "Sales orders"
   b. System sends Web notification to the customer indicating that order has been approved

21. *Out of scope - Car starts loading*
22. System updates order status according to the status in SAP:
    a. Initial weighing
       i. System also updates truck & driver details (plate number, driver name & ID) according to the SAP data (for bulk orders)
    b. Goods Issued
       i. System will send SMS and web notification to the customer informing them that they can monitor the truck location in real time.
    c. Delivered
23. System sends web notification indicating that the order has been delivered; **AF001.8**
24. Process ends

Alternative flow:

AF001.1 - Customer selects product type - Bag (Packed)

1. System automatically sets delivery method - Pickup
2. customer selects product type
   a. *NOTE: customer has option to add another product using "Add" button*
3. Customer selects the number of pallets
   a. Min 1 units, max 20 units
4. Customer selects Ship-to destination
5. Customer selects truck details:
   a. truck plate number
   b. trailer plate number
   c. Driver full name
   d. Driver ID number
   e. Delivery destination (e.g. ship-to-s received from SAP)
      i. Only one location per truck
6. Process will continue from formal flow 9

AF001.2 - Customer selects product type - Clinker

1. System automatically sets delivery method - Pickup (only method available for Clinker)
2. Customer selects Ship-to destination
3. Customer selects truck details:
   a. truck plate number
   b. trailer plate number

   c. Driver full name
   d. Driver ID number
   e. Delivery destination (e.g. ship-tos received from SAP)
4. Process will continue from normal flow 9

AF001.3 - Customer selects delivery method - pick up

1. Customer selects truck & driver details:
   a. truck plate number
   b. trailer plate number
   c. Driver full name
   d. Driver ID number
   e. Delivery destination (e.g. ship-tos received from SAP)
      i. Only one location per truck
2. Customer selects material type & quantity
3. Process will continue from normal flow 9

AF001.4 - Customer does not have sufficient balance

1. System shows error message
   a. NOTE: customer is able to save order as a draft
2. Process will continue from normal flow 3

AF001.5 - System saves order with the status “Approved” (only for for Bag / Clinker)

1. Process will continue from normal flow 20

AF001.6 - Administrator edits order

1. Administrator changes delivery date and/or dispatch factory and clicks “Save”
2. System sends web notification to the customer indicating his/her order has been edited by administrator
3. Process will continue from normal flow 19

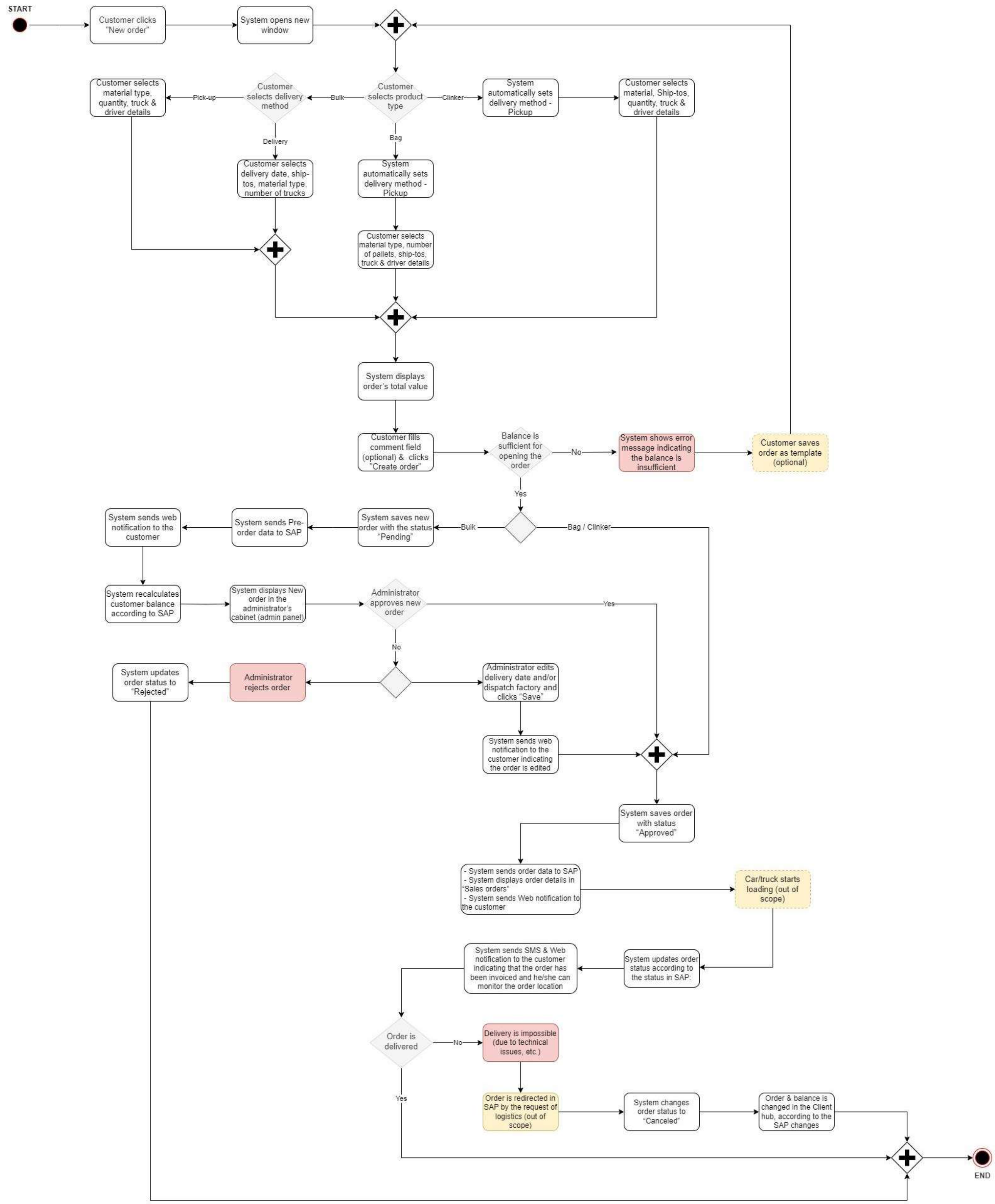
AF001.7 - Administrator rejects order

1. System updates order status to “Rejected”
2. Process will end

AF001.8 - Delivering can not be completed (due to technical issues, etc.)

1. *Out of scope - Redirection is initiated in the SAP, by the request of the logistic department*
2. *Out of scope - Order is edited in SAP (delivery date, balance, etc.)*
3. System updates order status to “Canceled”, according to SAP update
4. System updates balance, according to the SAP update
5. Process ends;

Diagram: Ordering [Source]



4.6.4.1. SAP shut down (out of scope)

Pre-condition: the customer order is already confirmed, trucks are waiting for loading & SAP system is shut down;

Recommended actions:

1. The sales administrator in the factory will take the information on the orders (the same confirmed passes) from the HUB and based on this information will allow the car to be loaded.
2. On the way back, the loaded truck will submit the weighting receipt to sales and the receipt will be adjusted to the actual weight (this will be done manually, as the SAP is not working) and updated to WayBill.
3. At the moment the actual weights are not displayed in the HUB and SAP, until the system is powered on.
4. Once SAP system is on, the sales admin will complete the pending orders in SAP by referring to the external code. This information will be synced to the HUB as well.

4.7. Finance

Finance page allows customers to view:

- Detailed balance:
    - **Balance** (ბალანსი - კლიენტის ბუღალტრული ნაშთი მიმდინარე შეკვეთების გარეშე (იგულისხმება უკვე გამოწერილი ა/ფ და ჩამორიცხვები))
    - **Not yet delivered** (მიმდინარე შეკვეთები (not yet delivered) - კლიენტის შეკვეთები, რომლებიც ჯერ არაა მიწოდებული)
    - **Delivered** (დასრულებული შეკვეთები (delivered) - კლიენტისთვის მიწოდებული შეკვეთები, რომლებზეც ჯერ არ არის გამოწერილი ა/ფაქტურა)
    - **Current balance** (მიმდინარე ბალანსი - კლიენტის ბუღალტრული ნაშთი მიმდინარე და დასრულებული შეკვეთების გათვალისწინებით)
    - **Guarantees** (საბანკო გარანტია - ბანკისგან წარმოდგენილი საბანკო გარანტიის საფუძველზე გახსნილი კრედიტ ლიმიტი
    - **Credit limit** (კრედიტ ლიმიტი - კლიენტისთვის ერთჯერადად მიცემული კონსიგნაცია პროდუქციის შესაძენად)
    - **Available balance** (ხელმისაწვდომი თანხა - თავისუფალი თანხა/ლიმიტი ახალი შეკვეთისთვის (კლიენტის მიმდინარე ბალანსის და საბანკო გარანტიის/კრედიტ ლიმიტის გათვალისწინებით))
- Invoices
    - Invoice date
    - Invoice number
    - Delivery number SAP
    - Delivery number RS
    - Invoice amount
    - RS invoice number
- Payment history
    - Amount
    - Date
    - Currency
    - Description

4.8. Notifications

Notifications can be accessed when the customer is signed in the client hub and he/she clicks on the notification icon in the top right corner of the page. When the icon is clicked, the system will display notification window with the following details:

- Notification list
- “X” button - for closing the window
- Pagination options

Each notification in the list will include following details:

- Notification description
- Notification text
- Time when notification was received

4.9. Profile

Profile can be accessed after a customer clicks the “Profile” icon in the top right corner of the page. When the icon is clicked, the system will display a window with following details:

- Company name
- Full name of the customer
- Phone number
- SAP code
- Company ID
- Locations
- Logout button

4.10. Users

Users page can be accessed from the sidebar. After clicking the “Users” button, the system will open new page and display:

- User list
    - Full name
    - Email
    - Role
    - Phone number
    - Registration date
    - “Edit” button
- Button “Add user”
- Search input field
- Filter options

4.10.1. Add user

New user can be added from the users page after the customer is logged in and he/she clicks "Add user". System will display new window and require to:

- Select the role of the user
- Enter the full name of the user
- Enter the email of the user
- Enter the phone number of the user

Customer should click "Create" in order to complete the process;

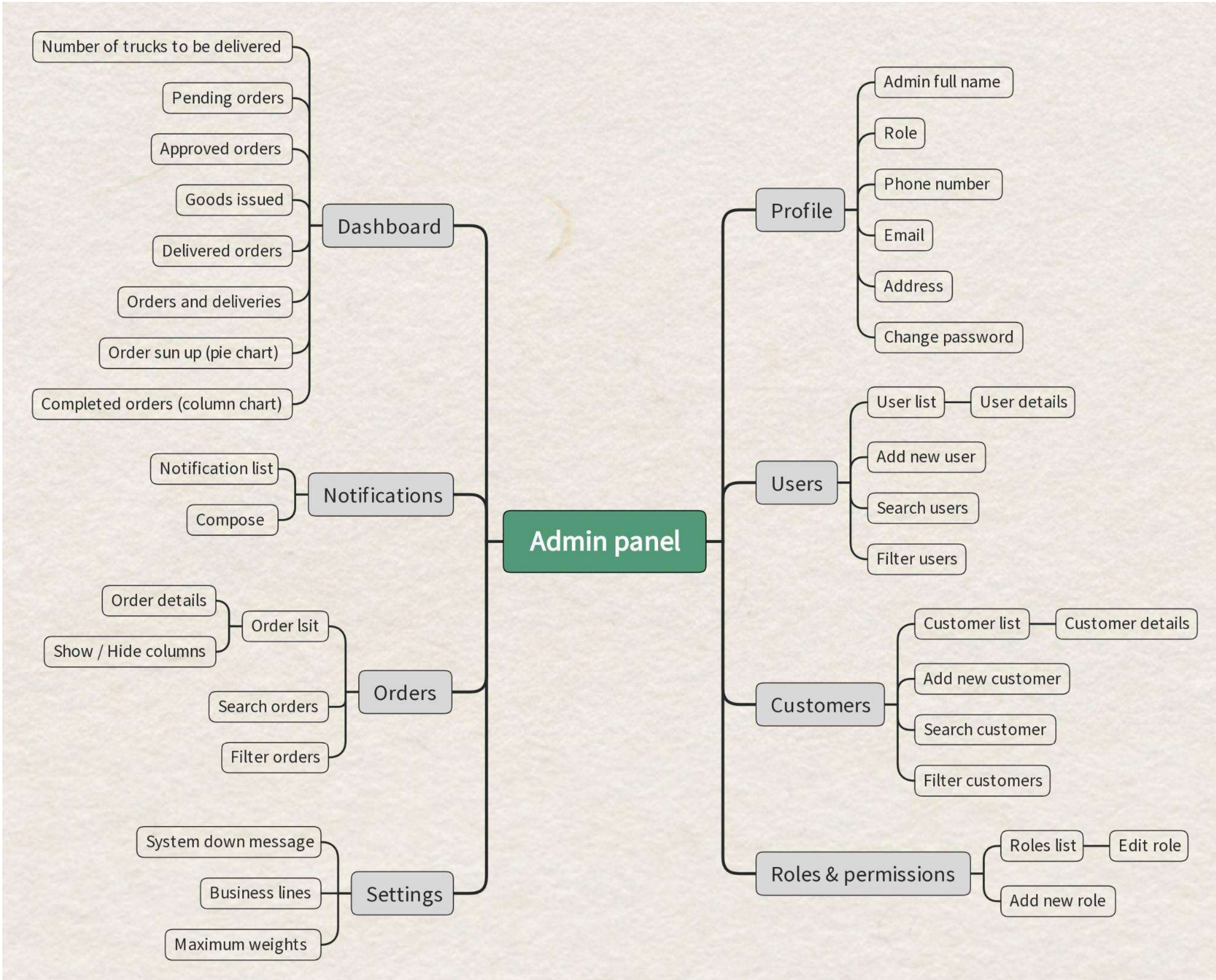
4.10.2. Edit / Delete user

In order to access the edit page, the customer should be logged in and he/she should click the "Edit" button in the user list (for the user that he/she wants to edit). System will open new window and display:

- User role with other roles that can be selected
- User full name
- User email address
- User phone number
- Button "Delete user"
- Button "Save changes"

5. ADMIN PANEL

5.1. Sitemap



5.2. Dashboard

5.2.1. Stakeholder requirements

#	Requirement	Type
001	User of the admin panel should be able to view general data of the the sales	Functional
002	User of the admin panel should be able to view number of pending, approved, issued and delivered orders	Functional
003	User of the admin panel should be able to view order sum up (pie chart)	Functional
004	User of the admin panel should be able to view completed orders (column chart)	Functional

5.2.2. Description

Dashboard is opened after the user is authorized in the admin panel. Dashboard will display following elements:

- The number of trucks to be delivered
    - Option to change date:
        - Today
        - Tomorrow
        - Custom date
- The number of pending orders
- The number of issued orders (e.g. goods issued)
- The number of delivered orders
- Orders and deliveries
    - Last 5 orders from the "Orders and deliveries" page
- Order sum up
    - Pie chart of the orders according to the order statuses
    - Option to change chart interval - week, month, year
- Completed orders
    - Column chart of the completed orders
    - Option to change chart interval - week, month, year

5.3. Notification center

5.3.1. Stakeholder requirements

#	Requirement	Type
001	HC Super admin should be able to view notification center	Functional
002	HC Super admin should be able to compose notifications	Functional
003	HC super admin should be able to save composed notification as a draft	Functional

5.3.2. Description

Notifications can be accessed after the admin is navigated to the any page of the admin panel and clicks the notification icon. System will display a new window with following details:

- The list of received notifications
- List of saved drafts
- Button "Compose"
  - Compose allows admin users to compose certain notification - including the text of the notification and attachment - and send it to the selected category of users;

When admin clicks "Compose", system should open new window and require to:

- Select the type of customers which will receive the notification:
  - All
  - Bulk cement
  - Bag cement
  - Clinker
- Select company (drop down menu)
- Enter the notification text
- Attach file:
  - Image
  - Link
  - Document
- Checkbox "mandatory notification"
  - When the checkbox is marked, the customer will not be able to close the notification without reading it first
- Select the schedule
  - Admin should select a date when the notification will be sent
- Buttons:
  - Save as draft - saves composed notification as a draft
  - Done - completes the process and sends the notification

5.4. Orders & deliveries

5.4.1. Stakeholder requirements

#	Requirement	Type
001	HC Super admin should be able to view customer orders	Functional
002	HC super admin should be able to search and filter orders	Functional
003	HC super admin should be able to customize the order list - hide or show certain columns	Functional

5.4.2. Description

Orders and deliveries shows the list of the orders of all customers. In order to access the page, admin should navigate to the nav bar and click "Orders and deliveries". System will open a new page and display following details:

- Order list with following columns:
    - Company name
    - Expected date
    - Destination
    - Weight
    - Goods issue date
    - Delivery date
    - Status
    - Truck plate number
    - Trailer plate number
    - Driver ID
    - Driver full name
    - Product type
    - Delivery method
    - Value
    - Material
    - SAP number
    - RS number
- Search bar for searching orders
- Filter options:
    - Filter by expected date
    - Filter by destination
    - Filter by order status

- Advanced filter button - opens new window with options:
    - Order status - drop down
    - Company name - drop down
    - Plant - drop down
    - Destination - drop down
    - Material - drop down
    - Estimated delivery date - calendar
    - Initiation date - calendar
    - Goods issue date - calendar
    - Delivery date - calendar
    - Weight - input (tones)
        - Inputs for minimum and maximum weight
    - Value (in GEL)
        - Inputs for minimum and maximum value
    - Cement type - checkbox
        - Bulk cement
        - Bag cement
        - Clinker
    - SAP number
    - RS number

Admin should be able to customize order list columns with the "Customize" button - when the button is activated, the system will display a window where admin can hide or show columns.

5.5. Users

5.5.1. Stakeholder requirements

#	Requirement	Type

001	HC Super admin should be able to add new user (e.g. admin panel user) from the admin panel	Functional
002	HC Super admin should be able to assign role to the new User	Functional
003	HC super admin should be able to edit or delete user	Functional

5.5.2. Description

5.5.2.1. User management

User management module of the admin panel involves following features:

- Viewing and managing User account details
- Updating User's information
- Adding new Users
- Viewing User list
- Search & filter User list

5.5.2.2. View user list

In order to view User management page, the admin should click on the "Users" button in the admin panel; System will open a new window and display:

- Users list (table) with following columns:
  - User full name
  - User email
  - User role
- Search bar & filter options
- Button for adding new User

5.5.2.3. Add new user

The process of adding a new User can be initiated after the super admin navigates to the "Users" page and clicks "Add". System will open new window and require to:

- Enter first name
- Enter last name
- Enter email address
- Enter phone number
- Select User role:
  - Logistics
  - Sales
  - Super admin

- Click “Add”

After super admin clicks “Add”, the system will send a confirmation link to the provided email address. User should open a confirmation link and create a password.

5.5.2.4. View user details

In order to view the User details page, the admin should navigate to the User list and click on the desired User. System will open a new window and display following details:

- User’s first name
- User’s last name
- User’s Email address
- User’s phone number
- User role
    - Logistics, sales, super admin
- User’s clients list with details (only for sales role):
    - Tax ID
    - SAP sold-to Code
    - Full name
    - Email
    - Company name
    - Status - Active / Pending / inactive
        - Active - customer has created the password and finished registration
        - Pending - customer has received confirmation email but hasn't proceeded further to the password creation and authorization;
        - Inactive - customer is inactive in SAP
    - Day of first activity
        - Activity - if customer has created order
    - Day of last activity

5.5.2.5. Search user

User search can be initiated after the admin navigates to the User list and locates the search bar. Admin should input specific search criteria to find the desired User. This can include:

- User’s name
- Email address
- Phone number
- Customer ID or account number

Admin should click “Search” in order to see search results;

5.5.3. Use case - Add new User

Actors:

- User
- System (e.g. client HUB),
- Super admin

Pre-conditions:

- Super admin is authorized and is navigated to the “Users” page

Post conditions:

- New User is successfully added in HUB by the Super admin

Normal Flow:

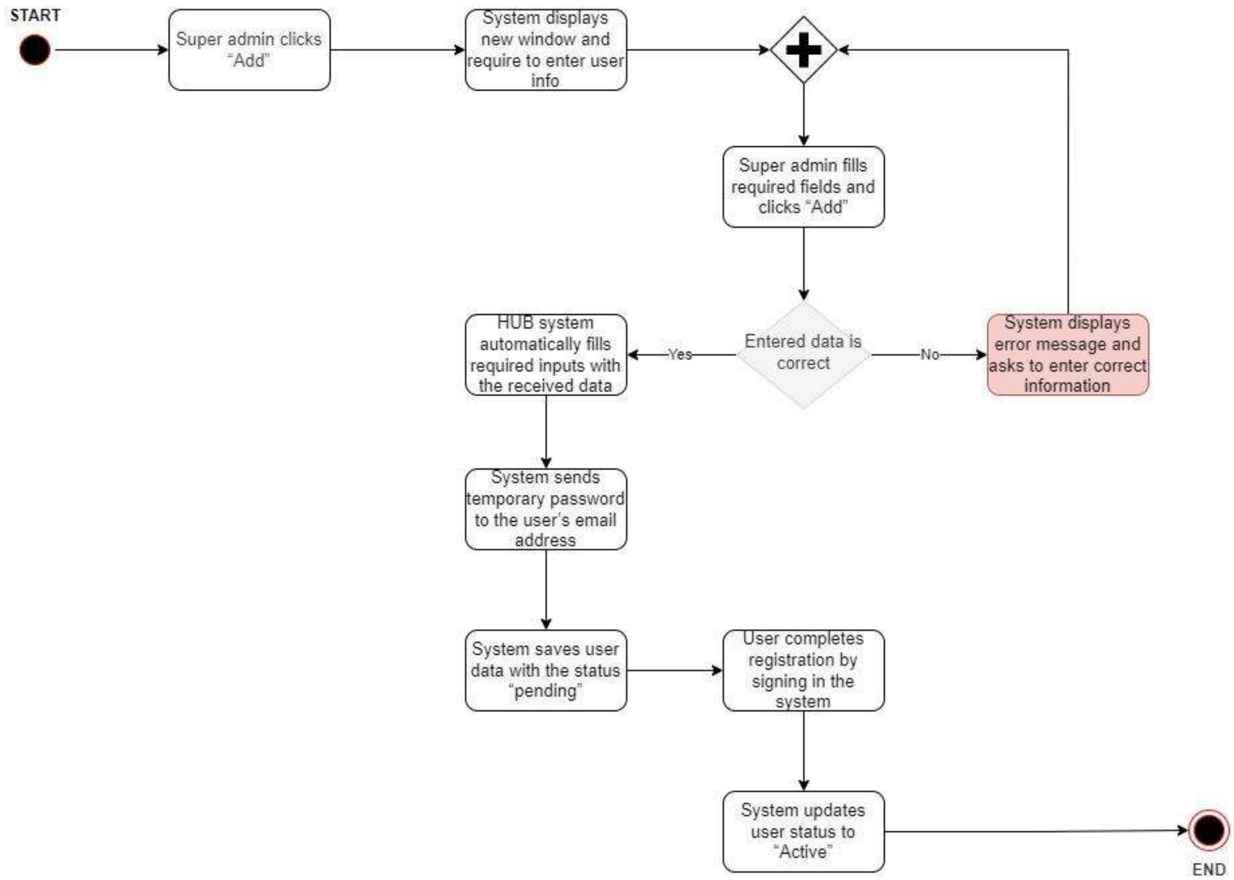
1. Super admin clicks “Add”
2. System displays new window and require to enter:
    a. First name / Last name
    b. Email
    c. Phone number
    d. User role
3. Super admin fills required fields and clicks “Add”
4. System checks if entered data is correct **AF001.1**
5. System sends registration email with temporary password to the User’s email address
6. System saves User data with the status “pending”
7. User completes registration by signing in the system
8. System updates User status to “Active”
9. Process ends;

Alternative flow:

AF001.1 - Entered data is not correct

1. System displays error message and asks to enter correct information
2. Process will continue from normal flow 3

Diagram: add new User [Source]



5.6. Customers

5.6.1. Stakeholder requirements:

#	Requirement	Type

001	HC Super admin should be able to add new customer (e.g. client) from the admin panel	Functional
002	System should be able to sync to SAP via Customer identification number (e.g. SAP code) and get customer data (during the registration)	Non-Functional
003	System should be able to synchronize customer data updates between SAP & Client hub	Non-Functional
004	Super admin should be able to select business line of the customer during the registration - CEM BL, RMC BL ● Cement is selected by default	Functional
005	Customer should be able to add new Sub-customer and assign the role(that defines the permission) in his/her client hub account	Functional
006	Customer should be able to edit or delete sub-customer	Functional
007	Customer should not be able to change his/her personal info in client hub	Functional

5.6.2. Description

5.6.2.1. customer management

customer management module of the admin panel involves several key features such as:

- Viewing customer list
- Viewing and managing customer account details:
  - Updating customer contact information, billing details;
- Tracking customer order history
- Adding new customers
- Search & filter customer list

5.6.2.2. View customer list

In order to view the customer list, the User of the admin panel should be authorized and should click on the “Customers” button in the navigation menu. When User clicks “Customers”, the system will open a new window and display:

- customers list (table) with following columns:
  - Customer tax ID

  - SAP sold-to Code
  - Customer full name
  - Customer email
  - Company name
  - Customer status - Active / Pending / inactive
    - Active - customer has created the password and finished registration
    - Pending - customer has received confirmation email but hasn't proceeded further to the password creation and authorization;
    - Inactive - customer is inactive in SAP
  - Day of first activity
    - Activity - when customer creates order
  - Day of last activity
- Search bar & filter options
- Button for adding a new customer

5.6.2.3. Add new customer

Adding a new customer can be initiated when the super admin clicks “Add”, the system will open a new window and ask to enter the customer's TAX ID

- Upon entering the customer’s tax ID, system will send a request to the SAP to get the customer data;
- The system will fill the input fields with the information that the SAP system sends back. The data received from SAP include:
  - Company name - SAP sold-to name
  - Tax ID
  - SAP Sold-to code
  - Customer group
- Super admin should enter manually:
  - Select sales rep
  - email, phone number, assignes roles
  - Select Bulk / Bag / Clinker (checkbox)
  - Select Business line
  - Select pick-up or Delivery or both;

When required fields are filled, the super admin clicks “Add customer” and the system will send registration link to the customer’s email address. In order to finish registration, customer should open registration link and create password (for more details see paragraph 1.1 - Registration)

5.6.2.4. View customer details

In order to view the customer details page, the admin should navigate to the customer list and click on the desired external customer's name. System will open a new window and display following details:

- Tabs:
    - Customer details
        - Company name
        - customer name
        - Company ID
        - Phone number
        - Email
        - Customer group (from SAP)
        - SAP code
        - Sales consultant and his/her:
            - Name
            - Email
            - Phone number
    - Orders & deliveries
        - Order list with search & filter options:
            - Checkbox for each order
            - Order date
            - Order ID
            - Order destination
            - Product type - Bag/Bulk/Clinker
            - Order weight
            - Order total value
            - Order status (not yet confirmed / confirmed / delivered / canceled / Rejected)
    - Financial info
        - Balance
            - Not yet invoiced
            - Delivered
            - Current balance
            - Bank Guarantees
            - Credit limit
            - Available balance

5.6.2.5. Search customer

Customer search can be initiated after the admin navigates to the external customer list and locates the search bar. Admin should input specific search criteria to find the desired customer. This can include:

- customer name
- Email address
- Phone number
- customer ID or account number

Admin should click “Search” in order to see search results;

5.6.3. Use case - Add new customer

Actors:

- customer
- System (e.g. client HUB),
- Super admin
- SAP

Pre-conditions:

- Super admin is authorized and is navigated to the “Customers” page
- Super admin has access to the customer’s SAP identification number

Post conditions:

- New customer is successfully added in HUB by the Super admin

Normal Flow:

1. Super admin clicks “Add”
2. System displays a new window and requires to enter SAP code of the customer
3. Super admin enters customer’s SAP code and clicks “Continue”
4. HUB sends request to SAP system to check the provided identification number and send customer data
5. SAP returns response with the customer’s data **AF001.1**
6. HUB system automatically fills required inputs with the received data
7. Super admin fills following inputs manually:
    a. Select sales rep
    b. Enter email, phone number,
    c. Assign roles

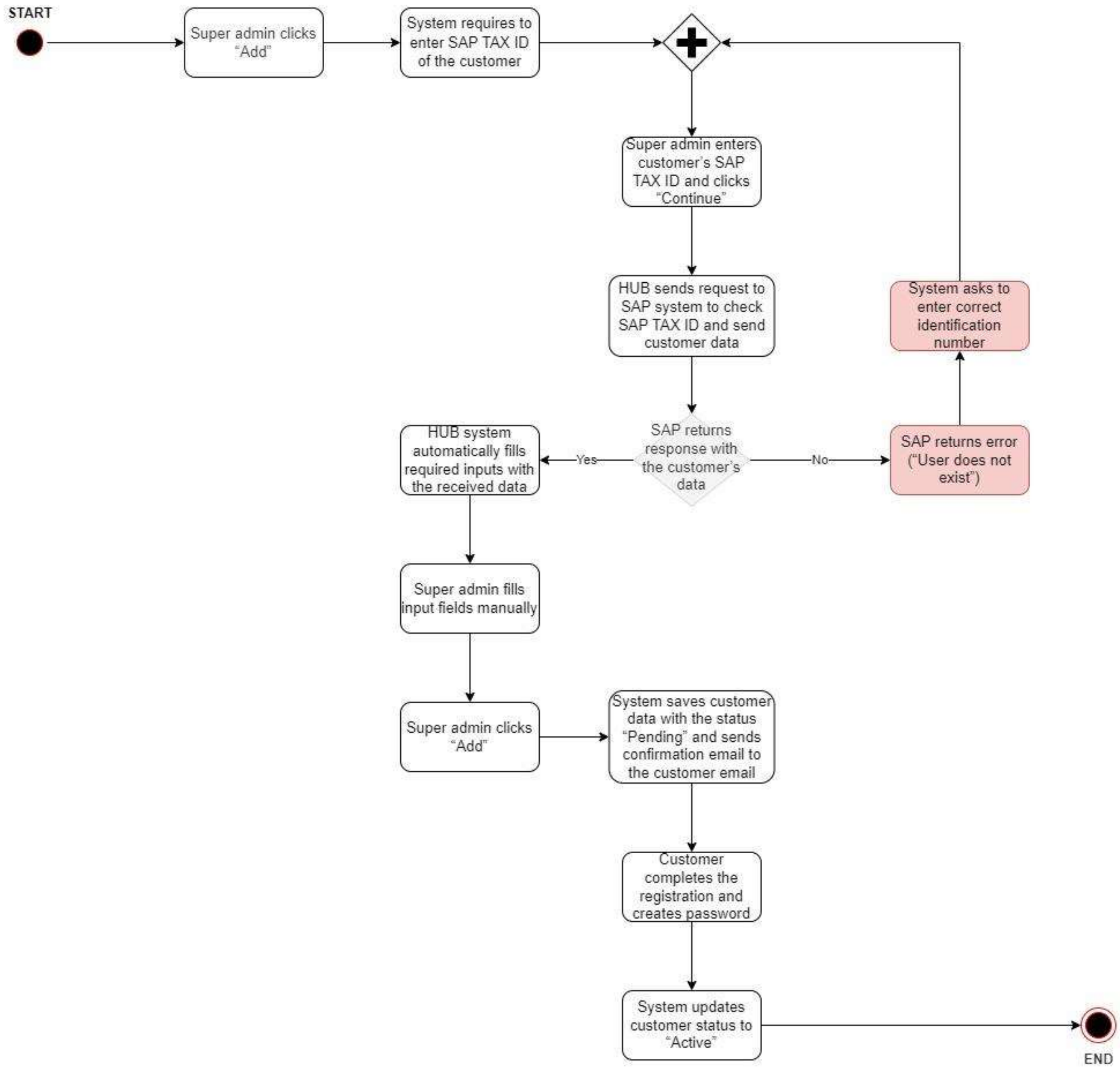
   d. Select Bulk / Bag / Clinker (checkbox)
   e. Select Business line
   f. Select pick-up or Delivery or both;
8. Super admin clicks “Add”
9. System saves customer data with the status “Pending” and sends confirmation email to the customer email;
10. customer completes the registration and creates account password
11. System updates customer status to “Active”
12. Process ends;

Alternative flow

AF001.1 - SAP returns error

1. System shows error message (“User does not exist”) and asks to enter correct identification number
2. Process will continue from normal flow 3

Diagram: add new customer [Source]



5.7. Settings

Settings page allows Users to configure client hub preferences and system settings. In order to access the settings page, User should navigate to the navigation panel and click "Settings". System will open new page and display following options:

- Notification parameters
    - Manage notification templates
- System down message
    - Customize system down message
- Business lines
    - Manage business lines
- Truck maximum weight allowances
- Password change

5.8. Profile

Profile can be accessed via activating the “Profile” icon - system will open new window and show following details:

- Full name of the user (e.g. admin)
- Role
- Phone number

- Email
- Address
- Option to Change password
- Logout option

5.9. Roles and permissions

Roles and permissions page can be opened after admin clicks the button “Roles and permissions”. System will open new page and show:

- The list of admin panel user roles
  - Role name
  - Pages - names of the pages that current role has access to
  - Permissions - View, edit, etc.
  - Edit option
- The list of customer roles

- Role name
- Pages - names of the pages that current role has access to
- Permissions
- Edit button

- Button “+Add Role”

5.9.1. Add role

Adding a new role can be initiated from the “Roles and permissions” page after admin clicks “Add Role”. System will open new page and display following details:

- input field for entering the name of the role
- The list of permissions together with the check boxes to select desired permissions
  - for full list of permissions, see paragraph Permissions bellow;
- “Save” button

5.9.2. Permissions

Permissions that can be assigned to the users / customers:

- Dashboard
  - View dashboard
- Orders and deliveries
  - View orders and deliveries
  - View order details page
  - Edit order (including approving and Rejecting the order)
- Users
  - View users page
  - View user details page
  - Add new user
  - Delete user
  - Edit user (including editing the permissions)
- Customers
  - View customers list
  - View customer details page
  - Add new customer
  - Edit customer
- Roles and permissions
  - View existing roles
  - Add new role
  - Edit role
  - Delete role

- Settings
  - View settings
  - Add business lines
  - Delete business lines
  - Add business lines
  - Edit maximum weight allowances

5.10. Integrations

- **SAP**
  - Balance updates
    - Balance recalculation according to the pre-order document
  - customer's personal information
  - Customer payment history
  - customer's products
  - New orders

- Order status updates
- Ship-to address updates
- customer status updates (Inactive status)
- SAP shut-down updates
- Reminders on bank guarantees and consignations
- Master Data
    - Business partners
    - Items master data
    - warehouse master data
    - Drivers
- WBLR
- CPRL
- CCMG

- **GPS**
    - Truck live location
    - ***NOTE: live location is accessed using the dedicated link that system receives from WBLR (SAP) after the order is shipped***
- **SMS service**
    - customer should get OTPs & shipping update sms-es

NOTE: update frequencies depend on the certain call / actions performed by the user of the admin panel or SAP, for ex. balance update service can be initiated each time the user refreshes the page, etc.