

## XYZ– Data Management System

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XYZ utilizes a combination of Outlook and vTiger to maintain both contact data and product inventory information. While this approach has been successfully implemented over the past 5 years, XYZ has decided to investigate a more robust solution that matches current business needs.

XYZ has asked BLC to provide guidance on a custom solution that matches the needs of the organization specifically related to inventory management. Currently, inventory searches tend to be slow and the process of finding relevant information tedious. As such, the vTiger solution is not leveraged as effectively as hoped as the sales process requires more rapid data access method.

## Project Goals

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1. Custom application to store and search inventory data
2. Convert existing data from vTiger into custom application for central access by all users.
3. Minimize operational impact

## Requirements

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1. Design Inventory management solution
  - a. Model data elements and associated relationships
  - b. Model data entry screens
  - c. Model other general user interface components
2. Searching capabilities
  - a. Define basic search capabilities
  - b. Define advanced search capabilities
  - c. Search archived data
3. Define other requirements
  - a. Define future operational improvements that integrate to Outlook's contact database (Exchange Integration)
  - b. Generate BOL or other operational documents
  - c. Potentially generate PO's or Invoices based on contact and inventory data.
    - i. Promote accuracy
    - ii. Efficiency in data management process
  - d. Analysis reports based on sales and inventory data

4. Historical Data

- a. Export Inventory data from vTiger and import into new system
  - i. Current data
  - ii. Past data

## Organization Information

Organization Details			
Organization Name	Industrial Equipment Company	Organization Number	ACC088
Primary Phone	873-495-1644	Fax	
Category		Assigned To	Scott Burkhalter
Modified Time	01-17-2014 18:15:53	Created Time	01-17-2014 18:15:53
Is Converted From Lead	No		
Address Details			
Billing Address	1610 Central Ave	Billing P.O. Box	
Billing City	Union City	Billing State	NJ
Billing Postal Code	07087	Billing Country	
Description Details			
Description			

## Contact Information

Basic Information			
First Name	Mr. Bill	Contact ID	CONT4204
Last Name	Baumann	Office Phone	
Organization Name	Atlas Refinery	Mobile Phone	
Category	CS1	Fax	873-585-7377
Title		Primary Email	
Email 2		Assigned To	Kristy O'Brien
Email 3		Created Time	06-28-2013 15:51:36
Modified Time	06-28-2013 15:51:36	Is Converted From Lead	No
Address Details			
Mailing Street	142 Lockwood St	Mailing P.O. Box	
Mailing City	Newark	Mailing State	NJ
Mailing Zip	07105	Mailing Country	
Description Details			
Description			
Profile Picture			

- 1) Create Table to hold contact information based on the current vTiger fields.
- 2) LINK TO ORGANIZATION
- 3) Contact Types
  - a. Contact category
    - i. Customers:
      1. CS1,CS2
      2. CS3,CS4
    - ii. Vendors
      1. DL
      2. DLHQ
    - iii. Others
      1. FTHQ, Corp


- 4) Delete contact (ADMIN ONLY)
  - b. Check if other data already exists
  - c. Confirmation
- 5) Assigned to:
  - d. LINK SALES REP LOOKUP TABLE

## Inventory Search

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- 1) Grid style inventory list
  - a. Thumbnail of item
- 2) Default to “ACTIVE” inventory items
- 3) Allow a selection from main menu that allows searching of “SOLD” items
- 4) Status
  - a. Active have no invoice data
  - b. Sold items have invoice data
- 5) Selecting Item
  - a. View item
    - i. Detail information
    - ii. Picture
  - b. Edit item – Data entry form
    - i. Adjust data
    - ii. Save
    - iii. Cancel
- 6) Fields available on grid
  - a. XYZ will provide a list
  - b. Basic lift and PO/sales data
- 7) Filter options
  - a. Drop-down of possible items
  - b. Enter free-form and list auto-filters

### Sample grid

Active Inventory	Sold Inventory	Purchase Orders	Invoices	Reports	Maintenance	Admin
Add	Edit	View Details				
Product Name	Year	ModelNum	Mast	Engine Type	Purchase Price	Image
Filter By	Filter By	Filter By	Filter By	Filter By	Filter By	
1994 Kalmar AC C50B-836	1994	AC C50B	Three Stage	LPG	1000	

## Inventory Entry

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- 1) Form to enter new inventory item
- 2) Launched from the inventory search screen or the main toolbar
- 3) Form Layout similar to current data entry screen (in terms of field position)
- 4) Load picture(s)

Associate multiple trucks to one PO or INV

\*\*Currently, the PO/INV is entered first into QB then into the management system

- 1) Contact name
- 2) PO#, Amount, Notes

Product Table Lookups:

- 3) Mast
- 4) Tires
- 5) Fuel
- 6) Battery Voltage
- 7) Attachments
- 8) Condition
- 9) Engine Type

\*\*Delete inventory item (ADMIN ONLY)

\*\*VIEW WITH AVAILABLE INVENTORY

\*\*VIEW WITH SOLD INVENTORY

Example Entry Screen:

Save Cancel

Inventory

Product Details

Product Name	2007 Bendi B40-335	Product Number	PRO3308
Year	2007	Serial No	B40-48-611B-04335
Manufacture	Bendi	Product Active	Yes
Model Number	B40/48E	Forks	Yes
Mast	Three Stage	Tires	Cushion
Hours	1903	Sideshifter	No
Engine Type	Electric	Fuel	Electric
Capacity	4000	Battery Voltage	48V
Battery	Yes	Charger	No
Condition	Average	Fork Length	0
Forklift Operating	Yes	Attachment	
Created Time	01-23-2014 15:26:16	Modified Time	02-06-2014 15:23:56
Description			

Pricing Information

Purchase Price	2500.00	Sales Price	19500.00
Unit Price	0.00	Handler	(choose)

Images

Purchase Order

PO #	(choose or add)	Subject	2007 Bendi B40-335
Vendor	(choose)	Contact	(choose)
Tracking Number		Requisition Number	
Date	02-06-2014 15:23:56	Assigned To	(choose)
Description			
Terms & Conditions	Unless otherwise agreed in writing by the supplier all invoices are payable within thirty (30) days of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.		

Invoice

Invoice #	(choose or add)	PO #	(choose or add)
Organization	(choose)	Contact	(choose)
Date	02-06-2014 15:23:56	Assigned To	(choose)
Description			
Terms & Conditions	Unless otherwise agreed in writing by the supplier all invoices are payable within thirty (30) days of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.		

## Data Conversion

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### Exporting products:

Very straightforward export function directly to CSV file with all fields that are currently displayed. Headers define the data that is found in each field.

### Export Contacts/Organization

Possible to export contact and organization data based on report options

### PO/INV Data:

- 1) Report options allow the building of a report template that includes linking of PO/INV data to inventory and contacts
- 2) Report data can be exported to CSV/Excel files for further processing
- 3) Some data conversion work will be necessary to “link” data that is exported via the methods above into new data model.

## Maintenance Screens

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- 1) Lookup maintenance
  - a. Mast
  - b. Tires
  - c. Fuel
  - d. Battery Voltage
  - e. Attachments
  - f. Condition
  - g. Engine Type
- 2) User maintenance
  - a. Add/maintain users
  - b. Assign security role
- 3) Example Maintenance screen:

Active Inventory	Sold Inventory	Purchase Orders	Invoices	Reports	Maintenance	Admin		
Add	Edit	View Details						
Contact	▼ Last Name	▼ First Name	▼ Organization	▼ Mailing City	▼ Mailing State	▼ Office Phone	▼ Mobile Phone	▼ Email
Organization								
▼ Lookups								
(Mast)	Doe	John	Org Name	Somewhere	ST	111-111-1111	222-222-2222	johndoe@email.com
(Tires)								
(Fuel)								
(Battery Voltage)								
(Attachments)								
(Condition)								
(Engine Type)								

## Reports

- 1) Inventory Reports
  - a. Available inventory
  - b. Filter list and “send to” report
  - c. Report can be printed, exported to file (must be saved to netowrk file system)
  - d. Report can be emailed as attachment
    - i. Manual process Phase One

## Phase Two

- 1) Email equipment
  - a. Find equipment through filtering of window
  - b. Create an email based on the data
  - c. Send formatted HTML email with results
  - d. Save as a quote or saved search
  - e. Email a link to the saved search so the user can see all the details themselves
- 2) Field Level security
  - a. Ability to control security level of individual fields
  - b. View only
  - c. Not visible
- 3) Sales Reports
- 4) Customer Reports

- 5) Commission Report
  - a. Maintain sales person and associated commission rate
  - b. By date range, earned commission based on truck sale
- 6) Sales Dashboard
  - a. Monthly sales activities
  - b. How each individual is doing
  - c. How group is doing
  - d. Establish targets that be used as gauges