PARADIN ENVIROTECH

Software Requirements Specification

ShieldCert System - Account Management Module

Version: 1.0

Date: 2025-12-22

Status: Draft

https://www.securewithpaladin.com

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1 Document Information

Field	Value
Project Name	ShieldCert System - Account Management Module
Version	1.0
Date	2025-12-22
Project Manager	TBD
Tech Lead	TBD
Qa Lead	TBD
Platforms	['Web']
Document Status	Draft
Client	Paladin Envirotech
Document Code	SHIELDCERT-ACCOUNT-122025

2 Project Overview

2.1 What Are We Building

2.1.1 System Function

A comprehensive account management system that handles the complete client lifecycle from initial account creation through ongoing relationship management, including contact management, pickup addresses, document storage, and Statement of Work (SOW) configuration with service level agreements.

2.1.2 Users

- Account Managers: Primary users for client relationship management
- Sales Representatives: Account assignment and client interaction
- Operations Staff: Access to account information for processing
- Administrators: Account approval and system configuration

2.1.3 Problem Solved

Eliminates manual client management processes, provides centralized client information storage, ensures consistent SOW management across all clients, automates SLA tracking, and maintains comprehensive audit trails for all client interactions.

2.1.4 Key Success Metric

100% digital client onboarding, 95% SLA compliance tracking, 50% reduction in account setup time, and complete audit trail for all client interactions.

2.2 Scope

2.2.1 In Scope

- Account dashboard with filtering and export capabilities
- Account creation and approval workflow
- Contact management with multiple contacts per account
- Pickup address management with responsible contacts

- Document upload and management system
- Statement of Work (SOW) creation and management
- Service fee configuration and pricing
- SLA management and tracking system
- Client decision tree configuration
- Asset tag requirements management

2.2.2 Out Of Scope

- External client portal access
- Advanced analytics and reporting dashboards
- Integration with external CRM systems
- Automated marketing communications

3 User Requirements

3.1 Account Dashboard Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-ACC-DASH	Access an Account Dashboard that displays all accounts in a grid view	Quickly review and manage account details with filtering and export capabilities	Must	Grid view with filtering, sorting, and Excel export functionality
FT-ACC-CREATE	Create a new account with all required information	Onboard new clients and use the account throughout the system	Must	Includes main address, invoice address, and main contact information
FT-ACC-APPROVE	Approve newly created accounts	Activate accounts for use in downstream processes	Must	Requires NetSuite Account Number before approval

3.2 Contact Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-CONT-CREATE	Create one or more contacts for an account	Maintain accurate communication records for each account	Must	Multiple contacts per account with contact type classification
FT-CONT-VIEW	View all contacts belonging to an account	Quickly reference or update account	Must	List view with contact details and navigation to edit

Feature Code	I Want To	So That I Can	Priority	Notes
		contact information		
FT-CONT-EDIT	Update contact details	Keep contact information current and accurate	Must	Includes audit trail of changes with user and timestamp

3.3 Pickup Address Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-PICKUP-CREATE	Create and manage pickup addresses for an account	Schedule shipments from correct locations with responsible contacts	Must	Links pickup addresses to account contacts as responsible parties
FT-STATE-SELECT	Select U.S. states from a predefined list	Ensure consistent state entries across the system	Should	Master list of all U.S. states for consistency

3.4 Document Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-DOC-UPLOAD	Upload documents for an account	Store supporting documents like contracts and agreements	Should	Document type classification and secure storage

3.5 Sow Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-SOW-CREATE	Create and manage	Capture all contractual	Must	Includes SOW types, revenue

Feature Code	I Want To	So That I Can	Priority	Notes
	Statements of Work (SOW) for client accounts	details and operational instructions		share, processing instructions, and SLAs
FT-SOW-SLA	Configure SLAs for different instruction types	Track and ensure compliance with client agreements	Must	Operational and client SLAs with base date configuration
FT-SOW-DECISION	Create client decision trees based on product attributes	Automate asset processing decisions per client requirements	Should	Rules based on product type, model, and manufacturer
FT-SOW-FEES	Configure service fees at the SOW level	Define applicable service charges for client orders	Must	Per unit, per order, and per weight charging types

4 Detailed Feature Requirements

4.1 Ft Acc Dash

4.1.1 Priority

Must Have

4.1.2 User Story

As an Account Manager, I want to access an Account Dashboard that displays all accounts in a grid view so that I can quickly review and manage account details

4.1.3 Preconditions

User has Account Manager role and is logged into the system

4.1.4 Postconditions

Account dashboard displays with filtering, sorting, and export capabilities

4.1.5 Test Cases

Id	Description	Weight
ACC-TC-001	Verify account dashboard displays all accounts in grid format with required columns	High
ACC-TC-002	Verify filtering functionality works for all grid columns	High
ACC-TC-003	Verify Excel export includes all displayed columns and data	Medium
ACC-TC-004	Verify only Account Manager role can access the dashboard	High

4.2 Ft Acc Create

4.2.1 Priority

Must Have

4.2.2 User Story

As an Account Manager, I want to create a new account so that the account can be used throughout the system for processing, billing, and communication

4.2.3 Preconditions

User has Account Manager role and accesses Create New Account screen

4.2.4 Postconditions

New account created with all required information and validation

4.2.5 Test Cases

Id	Description	Weight
ACC-TC-005	Verify account creation with all required fields populated	High
ACC-TC-006	Verify validation prevents saving with missing required fields	High
ACC-TC-007	Verify account type selection allows multiple types	Medium
ACC-TC-008	Verify main address and optional invoice address capture	High
ACC-TC-009	Verify main contact information is captured correctly	High

4.3 Ft Acc Approve

4.3.1 Priority

Must Have

4.3.2 User Story

As an Account Manager, I want to approve a newly created account so that the account becomes active and can be used in downstream processes

4.3.3 Preconditions

Account exists in Draft/Pending Approval status with NetSuite Account Number

4.3.4 Postconditions

Account status updated to Approved with unique account number assigned

4.3.5 Test Cases

Id	Description	Weight
ACC-TC-010	Verify account approval requires valid NetSuite Account Number	High
ACC-TC-011	Verify approval updates status and assigns unique account number (IXXXXX format)	High
ACC-TC-012	Verify restricted fields become read-only after approval	Medium
ACC-TC-013	Verify approval audit trail captures user and timestamp	High

4.4 Ft Cont Create

4.4.1 Priority

Must Have

4.4.2 User Story

As an Account Manager, I want to create one or more contacts for an account so that I can maintain accurate communication records

4.4.3 Preconditions

Valid account exists in the system

4.4.4 Postconditions

Contact created and linked to account with all required information

4.4.5 Test Cases

Id	Description	Weight
CONT-TC-001	Verify contact creation requires valid account selection	High
CONT-TC-002	Verify all required contact fields are validated before saving	High
CONT-TC-003	Verify multiple contacts can be associated with single account	Medium
CONT-TC-004	Verify contact type dropdown functionality	Medium

4.5 Ft Sow Create

4.5.1 Priority

Must Have

4.5.2 User Story

As an Account Manager, I want to create and manage Statements of Work (SOW) for client accounts so that I can capture all contractual details and operational instructions

4.5.3 Preconditions

Valid account exists and user has SOW management permissions

4.5.4 Postconditions

SOW created with all instructions, SLAs, and configuration linked to account

4.5.5 Test Cases

Id	Description	Weight
SOW-TC-001	Verify SOW creation with all required fields and validation	High
SOW-TC-002	Verify SOW type selection affects revenue share percentage visibility	High
SOW-TC-003	Verify processing instructions capture for all categories	High
SOW-TC-004	Verify SLA configuration with base date selection	High
SOW-TC-005	Verify client asset tag requirements configuration	Medium
SOW-TC-006	Verify SOW approval workflow before activation	High
SOW-TC-007	Verify decision tree creation and validation rules	Medium

5 Technical Requirements

5.1 Performance Standards

Requirement	Target	How To Test
Account dashboard loads	≤ 2 seconds	Load testing with 100+ accounts
Account creation saves	≤ 1 second	Performance testing during account creation
Excel export generates	≤ 5 seconds for 1000 accounts	Export testing with large datasets
Contact search response	≤ 1 second	Search testing with multiple contacts per account

5.2 Platform Requirements

Platform	Minimum Version	Target Version	Notes
Web Browser	Chrome 90+, Firefox 88+, Safari 14+, Edge 90+	Latest stable versions	Responsive design for desktop and tablet use

5.3 Security Privacy

Requirement	Must Have	Implementation
Role-based access control	True	JWT-based authentication with Account Manager role verification
Data encryption	True	AES-256 encryption for sensitive client data at rest

Requirement	Must Have	Implementation
Audit trail	True	Complete logging of all account and contact changes
Document security	True	Secure file storage with access control and virus scanning

6 External Dependencies

6.1 Third Party Services

Service	What It Does	Criticality	Backup Plan
NetSuite API	Account number validation and synchronization	Critical	Manual NetSuite number entry with validation
File Storage Service	Document upload and storage	Important	Local file system storage

6.2 System Requirements

Feature	Required	Optional	Notes
File Upload	True	False	Support for PDF, DOC, XLS, and image formats up to 10MB
Excel Export	True	False	Generate Excel files with all account data

7 Data Model

7.1 Entities

7.1.1 Account

7.1.1.1 Description

Core client account information

7.1.1.2 Key Fields

- account_id (Primary Key)
- account_name (Required)
- account_type (Multiple selection)
- netsuite_number (Required for approval)
- currency
- payment_terms
- sales_representative
- account_manager
- status (Active/Inactive)
- approval_status
- main_address
- invoice_address
- created_date
- approved_date
- approved_by

7.1.2 Contact

7.1.2.1 Description

Account contact information

7.1.2.2 Key Fields

- contact_id (Primary Key)
- account_id (Foreign Key)
- first_name (Required)
- last_name (Required)
- email_address (Required)
- phone_number
- contact_type
- created_date
- modified_date
- modified_by

7.1.3 Pickupaddress

7.1.3.1 Description

Account pickup locations

7.1.3.2 Key Fields

- pickup_id (Primary Key)
- account_id (Foreign Key)
- pickup_name (Required)
- pickup_code (Required)
- street_address (Required)
- street_address_2
- city (Required)
- state (Required)
- zip_code (Required)
- country (Required)
- responsible_contact_id (Foreign Key)

7.1.4 Statementofwork

7.1.4.1 Description

Client SOW configuration

7.1.4.2 Key Fields

- sow_id (Primary Key)
- account_id (Foreign Key)
- sow_type (Required)
- sow_name (Required, Unique per client)
- start_date (Required)
- end_date (Required)
- revenue_share_percentage
- receiving_instructions
- processing_instructions
- remarketing_instructions
- reporting_instructions
- client_asset_tags_count
- requires_decision_tree
- approval_status
- approved_by
- approved_date

8 Business Rules

8.1 Account Management

- Account names must be unique across the system
- NetSuite Account Number required before account approval
- Approved accounts cannot have Account Name or NetSuite Number modified
- Account can have multiple account types (Supplier, Customer, Downstream, OSP, 3PL)
- Main address is required, invoice address is optional

8.2 Sow Management

- SOW name must be unique per client
- Revenue share percentage only visible for Revenue Share and Buyback SOW types
- SOW must be approved before use in operations
- Decision trees are optional and only for SOWs marked as requiring them
- SLA base date determines calculation starting point (Pickup, Received, or Request Date)

8.3 Contact Management

- Each account must have at least one contact
- Email addresses must be unique within an account
- Pickup addresses must have at least one responsible contact assigned

9 Integration Points

9.1 Inbound Systems

System	Integration Type	Data Flow	Frequency
NetSuite	API	Account number validation and synchronization	Real-time

9.2 Outbound Systems

System	Integration Type	Data Flow	Frequency
Inbound Orders Module	Database	Account, contact, and SOW information for order creation	Real-time
Sales Orders Module	Database	Account and pricing information for sales processing	Real-time

10 Sign Off

10.1 Approval

Role	Name	Signature	Date

10.2 Document History

Version	Date	Changes Made	Changed By
1.0	2025-12-22	Initial Account Management module SRS based on ShieldCert System requirements	SRS Development Team