PARADIN ENVIROTECH

Software Requirements Specification

ShieldCert System - Inbound Operations 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 - Inbound Operations Module
Version	1.0
Date	2025-12-22
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Tech Lead	TBD
Qa Lead	TBD
Platforms	['Web']
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Client	Paladin Envirotech
Document Code	SHIELDCERT-INBOUND-122025

2 Project Overview

2.1 What Are We Building

2.1.1 System Function

Complete inbound order lifecycle management from order creation through receiving and initial processing, including pickup scheduling, SLA tracking, and pallet management for incoming IT assets.

2.1.2 Users

- Account Managers: Order creation and client coordination
- Operations Staff: Order receiving and processing
- Receiving Associates: Physical asset intake and pallet creation
- Warehouse Managers: Order oversight and status management

2.1.3 Problem Solved

Eliminates manual order tracking, automates SLA monitoring, provides real-time visibility into inbound shipments, ensures accurate receiving documentation, and maintains complete audit trails for all inbound operations.

2.1.4 Key Success Metric

100% digital order tracking, 95% SLA compliance, 50% faster receiving process, and zero receiving errors through barcode scanning and validation.

2.2 Scope

2.2.1 In Scope

- Inbound order dashboard with comprehensive filtering
- Order creation with SOW and client selection
- Pickup information management and scheduling
- SLA tracking and alerting system
- Receiving workflow with pallet creation

- Order status management and progression
- Processing instruction management at order level
- Bill of Lading (BOL) report generation

2.2.2 Out Of Scope

- Carrier integration for real-time tracking
- Automated pickup scheduling with carriers
- Advanced route optimization
- Mobile receiving applications

3 User Requirements

3.1 Order Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-INB-DASH	View centralized dashboard listing all inbound orders with key details	Track, monitor, and manage the inbound order lifecycle from creation to closure	Must	Real-time dashboard with sorting and filtering capabilities
FT-INB-CREATE	Create new inbound orders with client and SOW selection	Accurately capture and process client requests in the system	Must	Auto-populates SOW details including account manager and revenue share
FT-INB-SLA	View, track, and document SLAs associated with an order	Ensure all SOW requirements are met and exceptions are documented	Must	Automatic SLA calculation with warning and overdue alerts

3.2 Pickup Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-PICKUP-INFO	Enter and manage pickup information for an order	Track customer expectations and pickup process lifecycle	Must	Includes preference date, scheduled date, actual date, and carrier information
FT-PICKUP-BOL	Print Bill of Lading report	Provide proper documentation	Must	BOL generation available after

Feature Code	I Want To	So That I Can	Priority	Notes
	once order is scheduled	for carrier pickup		order marked as scheduled

3.3 Receiving Operations

Feature Code	I Want To	So That I Can	Priority	Notes
FT-RCV-DASH	See dashboard of orders waiting to be received	Quickly identify which orders need processing upon arrival	Must	Shows only orders with actual pickup date (collected status)
FT-RCV-PROCESS	Start receiving process and enter all required receiving details	Record information and create inbound pallets for the order	Must	Captures weight, packaging type, creates pallets, allows photo capture
FT-PALLET-MGMT	Generate and manage pallet numbers	Uniquely identify pallets throughout the workflow	Must	Format: INO-ORDER#-XXX, linked to order

3.4 Status Management

Feature Code	I Want To	So That I Can	Priority	Notes
FT-STATUS-UPDATE	Update and track order status progression	Accurately reflect order progress from creation to completion	Must	Status progression: New → Scheduled → Collected → Received
FT-STATUS-BACKWARD	Move order status backward when necessary	Perform corrections or rework in alignment with	Should	Requires appropriate permissions and

Feature Code	I Want To	So That I Can	Priority	Notes
		business processes		maintains audit trail

4 Detailed Feature Requirements

4.1 Ft Inb Create

4.1.1 Priority

Must Have

4.1.2 User Story

As an Account Manager, I want to create a new inbound order so that client requests can be accurately captured and processed in the system

4.1.3 Preconditions

User has Account Manager role, valid accounts and SOWs exist in system

4.1.4 Postconditions

Inbound order created with unique order number (WC-YYXXXX format), linked to account and SOW

4.1.5 Acceptance Criteria

- System requires client selection from accounts with Supplier type
- Pickup address selection from account-related addresses
- Contact selection from account-related contacts
- SOW selection from account-associated SOWs
- Auto-display of Account Manager, Sales Rep, and Revenue Share from SOW
- Warehouse selection from user-accessible warehouses
- Client Requested Service Date required
- Unique order number generated: WC-YYXXXX (warehouse code + year + sequence)
- All required fields validated before saving

4.1.6 Test Cases

Id	Description	Weight
INB-TC-001	Verify inbound order creation with all required fields	High
INB-TC-002	Verify SOW selection auto-populates account manager and revenue share	High
INB-TC-003	Verify unique order number generation in correct format	High
INB-TC-004	Verify validation prevents saving with missing required fields	High

4.2 Ft Inb Sla

4.2.1 Priority

Must Have

4.2.2 User Story

As an Account Manager, I want to view, track, and document SLAs associated with an order so that I can ensure all SOW requirements are met

4.2.3 Preconditions

Order created with SOW selected, SLAs configured in SOW

4.2.4 Postconditions

SLAs displayed with due dates, status tracking, and comment capability

4.2.5 Acceptance Criteria

- System auto-displays all SLAs from selected SOW
- SLA categories: Reports (Acknowledgement, Collection Scheduled, Audit Report, Settlement, Revenue Share, Receipt, CODD, COR) and Operations (Audit Complete, Ops Complete)

- Client Due Date calculated: [Client SLA] - ([Today] - [SLA Base Date])
- Ops Due Date calculated: [Ops SLA] - ([Today] - [SLA Base Date])
- Days Remain calculated for both client and ops SLAs
- Status indicators: On Track (>30% time remaining), Warning (<30% time remaining), Overdue (no time remaining)
- Comment field available for each SLA to explain met/not met status
- Comments saved with user and timestamp
- SLA marked as Met when corresponding process step completed

4.2.6 Test Cases

Id	Description	Weight
SLA-TC-001	Verify SLAs auto-populate from SOW configuration	High
SLA-TC-002	Verify SLA due date calculations based on base date	High
SLA-TC-003	Verify status indicators (On Track, Warning, Overdue) display correctly	High
SLA-TC-004	Verify comment functionality with user and timestamp capture	Medium

4.3 Ft Rcv Process

4.3.1 Priority

Must Have

4.3.2 User Story

As a receiving operator, I want to start the receiving process for a selected order and enter all required receiving details so that the system can record information and create inbound pallets

4.3.3 Preconditions

Order has actual pickup date (Collected status), operator has receiving permissions

4.3.4 Postconditions

Receiving information recorded, inbound pallets created with unique numbers, order can be marked as received

4.3.5 Acceptance Criteria

- System displays order number and receiving instructions
- Operator records: Received Date, Packaging Type, Weight, Client Reference Number, Receiving Comment
- System auto-creates inbound pallet in format: INO-ORDER#-XXX
- Multiple pallets can be created for single order
- Each pallet linked to order
- Photo capture capability for each pallet
- Grid displays all inbound pallets with: Pallet Number, Packaging Type, Weight, Client Pallet Reference
- Pallet information editable until order marked as received
- No edits allowed after order marked as received
- Operations Manager can revert order status to allow edits if needed

4.3.6 Test Cases

Id	Description	Weight
RCV-TC-001	Verify receiving process captures all required information	High
RCV-TC-002	Verify inbound pallet creation with correct format	High
RCV-TC-003	Verify multiple pallets can be created for single order	High
RCV-TC-004	Verify photo capture and association with correct pallet	Medium
RCV-TC-005		High

Id	Description	Weight
	Verify edit restrictions after order marked as received	

5 Data Model

5.1 Entities

5.1.1 Inboundorder

5.1.1.1 Description

Core inbound order information

5.1.1.2 Key Fields

- order_id (Primary Key)
- order_number (Unique: WC-YYXXXX)
- account_id (Foreign Key)
- sow_id (Foreign Key)
- pickup_address_id (Foreign Key)
- contact_id (Foreign Key)
- warehouse_id (Foreign Key)
- client_po_number
- client_reference_number
- client_requested_service_date (Required)
- order_remarks
- status (New, Scheduled, Collected, Received, Audit Complete, Process Complete, Settled, Completed)
- created_date
- created_by
- scheduled_date
- actual_pickup_date
- received_date
- audit_date
- process_complete_date
- settled_date
- close_date

5.1.2 Pickupinformation

5.1.2.1 Description

Pickup scheduling and tracking

5.1.2.2 Key Fields

- pickup_info_id (Primary Key)
- order_id (Foreign Key)
- client_preference_date
- scheduled_pickup_date
- estimated_delivery_date
- actual_pickup_date
- carrier_id (Foreign Key)
- freight_quote
- freight_actual
- product_description
- estimated_pallets
- expected_products
- pickup_instructions

5.1.3 Inboundpallet

5.1.3.1 Description

Receiving pallet tracking

5.1.3.2 Key Fields

- pallet_id (Primary Key)
- pallet_number (Unique: INO-ORDER#-XXX)
- order_id (Foreign Key)
- packaging_type
- weight
- client_pallet_reference
- receiving_comment
- photo_url

- created_date
- created_by

5.1.4 Ordersla

5.1.4.1 Description

SLA tracking per order

5.1.4.2 Key Fields

- sla_id (Primary Key)
- order_id (Foreign Key)
- sla_type (Report or Operations)
- sla_name
- base_date_type (Pickup, Received, Request)
- base_date
- client_sla_days
- ops_sla_days
- client_due_date
- ops_due_date
- status (On Track, Warning, Overdue, Met)
- met_date
- met_by
- comments

6 Business Rules

6.1 Order Creation

- Order number format: WC-YYXXXX (warehouse code + year + sequential)
- Client must be account type Supplier
- SOW must be approved before use in order
- Client Requested Service Date required for all orders
- Account Manager from SOW can be overridden at order level

6.2 Status Progression

- New → Scheduled (requires Scheduled Date)
- Scheduled → Collected (requires Actual Pickup Date)
- Collected → Received (requires Received Date and pallet creation)
- Status can move backward with appropriate permissions
- All status changes logged in audit trail

6.3 Sla Tracking

- SLA status: On Track if >30% time remaining
- SLA status: Warning if <30% time remaining
- SLA status: Overdue if no time remaining
- SLA base date determines calculation start (Pickup, Received, or Request Date)
- SLA automatically marked Met when process step completed

6.4 Receiving Rules

- Order must have Actual Pickup Date before appearing in receiving dashboard
- Pallet format: INO-ORDER#-XXX (sequential per order)
- Multiple pallets allowed per order
- Pallet edits locked after order marked as received
- Operations Manager can revert status to allow corrections

7 Integration Points

7.1 Inbound Systems

System	Integration Type	Data Flow	Frequency
Account Management	Database	Account, SOW, contact, and pickup address information	Real-time
Warehouse Management	Database	Warehouse and location information	Real-time

7.2 Outbound Systems

System	Integration Type	Data Flow	Frequency
Asset Auditing	Database	Order and pallet information for asset data capture	Real-time
Invoicing	Database	Order completion status for invoice creation	Real-time

8 Sign Off

8.1 Approval

Role	Name	Signature	Date

8.2 Document History

Version	Date	Changes Made	Changed By
1.0	2025-12-22	Initial Inbound Operations module SRS	SRS Development Team