Functional Requirements Document

MxConnect – To Be Collected/Outside Sales

Client Name: Chick-fil-A

Version: 1.0

Date: 3/26/2019

Document History

The following changes to the FRD have been made prior to client sign-off

Version	Date	Author	Change Description:
1.0	3/26/2019	Staten Putnal	First Draft
	4/11/2019	Will Englefield	Reviewed
	4/10/2019	Neha Shah	Reviewed

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I.Functional Specification Overview

Functional Area	Core
JIRA Number	INF- 3518
Author	Staten Putnal

Status	Ready for Review

II. Business Purpose

The To Be Collected/Outside Sales workflow task currently requires the user to access the legacy MMS page when completing the workflow task. With an initiative to move towards a mobile platform in the restaurants, the MMS version of the page is often difficult to navigate and view on a mobile device. Operators use this page to view, and if needed, modify To Be Collected sales that have been entered on the Point of Sale for a given day.

Detail

Chick-fil-A would like to move the To Be Collected (TBC) and Outside Sales pages to the mobile platform.

The user should have the ability to:

- View TBC sales tendered on the POS on a page in MxConnect.
- View Outside sales tendered on the POS on a page in MxConnect.
- Select and assign an account name in MxConnect.
- Enter or modify an Invoice Number for a transaction
- Enter or modify a Description for a transaction
- Apply or save any updates made on the page
- Select a date from the calendar picker
- Add a new account on the page
- Filter results displayed on the page (by tender type, destination, account)
- Have the columns sortable by ascending or descending order
- Have a way to view all payments applied to the invoice (history of invoice)
- Provide a way to reconcile missing account names for data entered for a previous day.
- When entering the TBC page via the workflow, the user should be prompted if there are previous days with missing account names. An action will bring the user to the day with missing account names so they can correct the transaction.

III. User Stories

Summary

Story 1: As an Operator, I would like a page for viewing TBC and Outside Sales transactions on a mobile device.

Story 2: As an Operator, I would like the ability to add a new customer (account) for a TBC sale on a mobile device.

Story 3: As an Operator, I would like to be prompted for any previous days TBC sale transactions that require action when entering the To Be Collected page on a mobile device.

Detail

Story 1: As an Operator, I would like a page for viewing TBC and Outside Sales transactions on a mobile device.

The new MxConnect page should provide a list view of all TBC and Outside Sales transactions performed on the Point of Sale for the day selected.

The page should contain the following fields:

1. Account Name – The Customer the transaction will be applied to
2. Invoice Number – Invoice number entered for transaction
3. Description – A brief description of the transaction
4. Tender Type – either TBC or Credit Card
5. Destination – either Outside or Inside sale
6. Transaction ID – Transaction ID from Point of Sale
7. Gross Sales – Gross Sales amount for transaction
8. Sales Tax – Sales tax amount for transaction
9. Tax Exempt – Tax exempt flag, either Yes or No
10. Cashier – Cashier and Shift Number for transaction

The page will contain a calendar selector and default to the current date.

Acceptance Criteria

1. Confirm a page exist for To Be Collected/Outside sales
2. Confirm upon page load, the page defaults to the current workflow date.
3. Confirm the page loads all TBC's for the day.
4. Confirm the page loads all Outside Sales for the day.
5. Confirm the page displays the Account Name if entered on the Point of Sale.
6. Confirm the page displays the Invoice Number if entered on the Point of Sale.
7. Confirm the page displays a Description if one is entered.
8. Confirm the description can be changed and the changes will be retained.
9. Confirm the Account Name can be changed and the changes will be retained.
10. Confirm the Invoice Number can be changed and the changes will be retained.
11. Confirm the Tender Type of TBC is displayed for To Be Collected sales
12. Confirm the appropriate Tender Type is displayed for Outside sales.
13. Confirm the Destination of Inside is displayed for sales tagged with a destination of Inside on the POS.

14. Confirm the Destination of Outside is displayed for sales tagged with a destination of Outside on the POS.
15. Confirm the Transaction ID is displayed on the page.
16. Confirm the Gross Sales amount is displayed on the page.
17. Confirm the Gross Sales amount matches the amount entered on the Point of Sale.
18. Confirm the Transaction ID matches the transaction id of the sale on the Point of Sale.
19. Confirm the Sales Tax amount is displayed on the page.
20. Confirm the Sales Tax amount matches the amount of tax on the Point of Sale.
21. Confirm the Tax Exempt field has a "N" displayed for non tax exempt transactions.
22. Confirm the Tax Exempt field has a "Y" displayed for tax exempt transactions.
23. Confirm the Cashier is displayed on the page.
24. Confirm the Cashier displayed matches the cashier entered on the Point of Sale.
25. Confirm the Cashier's shift number is displayed on the page.
26. Confirm the date can be changed with the calendar selector.
27. Confirm when a date is changed, the TBC/Outside sales for the day selected are loaded.
28. Confirm access to the page can be toggled on or off with a security permission.
29. Confirm that a TBC transaction becomes uneditable on the TBC/Outside Sales page when a collected sale is applied to the transaction OR the day is Finalized

Detail

Story 2: As an Operator, I would like the ability to add a new customer (account) for a TBC sale on a mobile device.

The new page will provide the user with an ability to change the Account Name when needed. If the account (customer) doesn't exist, the user will have the ability to create a new account by selecting a link to the Customer Management page. Once selected, the user will input the account information on the Customer Management page (Financial/Customer).

Acceptance Criteria

1. Confirm the new page provides a way for a new customer to be added to the Account Name field.
2. Confirm a link exist for the MxConnect Customer Management page from the TBC/Outside Sales page.
3. Confirm selecting the link will open the Customer Management page.

Detail

Story 3: As an Operator, I would like to be prompted for any previous days TBC sale transactions that require action when entering the To Be Collected page on a mobile device.

There are times when POS systems are taken offsite, and reconnected to the restaurant network, after the business date, for the transaction has been completed, In some cases transactions may have been entered for TBC's, that do not have an associated Customer Account. In this scenario when entering the TBC page, any previous business days TBC/Outside sales transactions missing the Account Name should be displayed in a modal so the account can be selected and applied to the transaction.

Acceptance Criteria

1. Confirm when a previous days TBC/Outside sales transaction is missing the account name, a warning message is displayed.
2. Confirm when the account name is selected, the transaction is no longer displayed in the modal.
3. Confirm the message is only displayed when days greater than the current business day are missing the account name.

IV. Assumptions or Constraints

V. Testing and Training Considerations

HotSchedules will perform initial quality testing. Chick-fil-A will test functionality in the Chick-fil-A testing environment prior to release.