Critical Business Operations

Business flows listed below exhaust all issues treated as blockers

General Conditions

System is defined as working if a basic user interaction with systems is possible, in particular:

- **A user can log in to XTRF Home Portal.**
- A user is able to execute the use cases defined as critical for each module he/she has been granted required permissions.
- The list of critical modules includes:
    1. Vendors Management Module (HP)
    2. Customer Management Module (HP)
    3. Business Process Management Module (HP - Workflows, Quotes & Projects)
    4. Invoicing Management Module (HP)
    5. Reporting (HP)
    6. Communication (HP - CRM, emails and system notifications)
    7. Vendor Portal
    8. Customer Portal

Vendors Management module (HP)

1. Browse and search for a Provider
2. Create Provider (with no Individual option enabled)
3. Edit (Address and Correspondence Address)
4. Edit Competences and Rates:
    1. Language Combinations, Job Type, Specialization
    2. Create additional Price Profile
    3. Create Rate
5. Create Contact Person
6. Create Price List (with Rates)

Customer Management module (HP)

1. Browse and search for a Customer
2. Create Customer
3. Edit (Address and Correspondence Address)
4. Rates:
    1. Create Price Profile
    2. Create Language Combination
    3. Create Rate
5. Create Contact Person
6. Create Price List (with Rates)

Business Process Management Module (HP - Workflows, Quotes & Projects)

Quotes

1. Browse and search for a Quote
2. Create Quote:
    1. With a simple workflow (Translation)
    2. Create Language Combination
    3. Create Task:
        1. Adding CAT Receivable:
            1. Analysis file
            2. Rates (from Customer Rates)
    4. Send Quote Confirmation
    5. PDF generation for Quote Confirmation
    6. Provider selection
    7. Create CAT Payable:
        1. Rates (from Provider Rates)
3. Edit Quote
    1. Instructions
    2. Delete CAT Receivable
    3. Create Receivable
    4. Delete CAT Payable
    5. Create Payable
4. Create Quote (Workflow with Quote phase)
    1. Create Workflow definition: File Preparation(Quote Phase) + Translation(Project Phase)
    2. Create Quote with defined Workflow
    3. Providers selection for Jobs in : Quote Phase and Project Phase
    4. adding Input Files
    5. Start Job
    6. Add Output file(s)
    7. Finish Job
5. Convert Quote to Project

Projects

1. Browse and search for Project
2. Create base Project
    1. Workflow: Translation
    2. Task creation
    3. CAT Receivable
        1. Rates (from Customer Rates)
    4. Send Project Confirmation
    5. PDF generation - Project Confirmation
    6. Provider selection
        1. Create CAT Payable
        2. Rates(from Provider Rates)
    7. Send Purchase Order
3. Edit base Project
    1. Change Deadline
    2. Delete CAT Receivable
    3. Delete CAT Payable
    4. Task:
        1. Copy Task
        2. Add Language Combination
        3. Cancel Task
4. Create Project with default Workflow
    1. Workflow: Translation + Proofreading
    2. Customer selection
    3. Creating CAT Receivable/Receivable
    4. Providers selection
    5. Jobs: create CAT Payable/Payable
    6. Adding Input File(s)
    7. Starting Workflow
    8. Job Manager (Workflow Graph):
        1. New Job (mailing)
        2. adding Output File(s)
        3. Finishing Jobs
        4. Work Files
        5. Jobs closure
    9. Sending Output files to Customer

10. Provider Evaluation + Internal Feedback
11. Edit and send Customer Survey
5. Create Project with Availability Request
    1. Project with Workflow Translation + Proofreading
    2. Sending Availability Request from Task using default rule
        1. Sending Availability Requests emails to matched Providers
        2. Accepting/Rejecting Availability Requests
    3. Providers selection
6. Create Project with "project" Workflow
    1. Create definition of "project" Workflow: e.g File Preparation (project level) + Translation (Task)
    2. Create Project based on "project" Workflow
    3. Files forward from project level to task level
7. Create Project based on Project Template
    1. Create Project
    2. Create Project Template based on given Project
    3. Create Project based on Template created
    4. Duplicate Project

Opportunities

1. Browse and search for Opportunity
2. Created manually
3. Edit Opportunity:
    1. Change status
    2. Add offer
4. Created automatically
    1. create Quote
    2. Quote created for Opportunity

Dashboard

1. Dashboard
2. Edit (at least one project open)
    1. Tree menu
    2. Changing Job status
    3. Adding Receivable/CAT Receivable

Invoicing Management Module (HP)

1. Browse and search for Customer Invoice
2. Browse and search for Vendor Invoice specification
3. Create Invoice for Customer (invoicing Project)
4. Create Empty Pro Forma
5. Update Empty Pro Forma to Final Invoice
6. Create Invoice for Provider (invoicing Providers Jobs)
7. Create empty Invoice for Provider

Reporting Module (HP)

1. Displaying default financial report
    1. Generate table on Browse view
    2. Generate chart on Browse view
2. Create financial report (e.g. Number of Projects)
3. Create Complaint in Project

CRM Module (HP)

1. Create and edit email Templates
2. Sending email based on Email Templates
3. Create Tasks and Reminders

Customer Portal

1. Authentication - a customer is able to login
2. A Customer is able to reset a password
3. A customer is able to create a quote

Provider Portal

1. Authentication - a vendor is able to login
2. Registration Freelancer/Company
3. Jobs management
4. Contacts/users management
5. Create Invoices
6. Password reset
7. Vendor is able to access work files
8. Vendor is able to receive POs from the vendor portal
9. Vendor is able to deliver jobs