

Business Requirement Document (BRD) & Plan of Action

Client: Peoplepro Technologies

Project : Peoplepro Technologies DF Asset Lifecycle Management System

Prepared by: Shivit Technologies Private Limited

Version: 1.1

Date: 18th Feb 2026

Company Introduction

Shivit Technologies Pvt. Ltd. is a trusted Indian IT company with over a decade of experience in delivering enterprise-grade solutions. We specialize in ERP, procurement, and financial automation tailored to manufacturing, export, and service-based industries. Our robust Procure-to-Pay (P2P) and Expense Management Systems are designed for scalability, compliance, and deep process automation.

Why Shivit Technologies?

- Proven track record of successful ERP implementations across industries
- Strong domain expertise in manufacturing, hardware exports, and process industries
- Customizable platforms built on modern cloud-native architecture
- Agile delivery with Indian support and global deployment capability
- Competitive pricing with high ROI and transparency

This Business Requirement Document (BRD) outlines the high-level business needs and technical solution approach for Peoplepro Technologies.

1. Project Objective

The primary objective of this project is to implement a structured system for:

- Distributor & Retailer level Budget Control
- DF (Deep Freezer) Asset Procurement & Deployment
- Multi-Level Approval Workflow
- Asset Tracking via QR Code
- Maintenance Management (Preventive & Breakdown)
- Asset Transfer Management
- Post-Deployment Physical Verification
- Complete Audit Trail & Compliance

The system will be fully role-based and support a multi-location organizational structure.

2. Scope of Implementation

The system will cover three major modules:

1. Budget & Requisition Management

2. Procurement & Asset Creation

3. Asset Lifecycle Management

- Deployment
- Transfer
- Maintenance
- Physical Verification

3. Organizational Structure & Access Control

Role-Based Application Access

The system will support the following roles:

- SO (Sales Officer)
- DM
- ASM
- SH
- TM
- Finance
- COO
- MD
- Distributor
- Retailer

Location Hierarchy

Company → Zone → Branch Type (Distributor / Retailer / Plant / Head Office)

Users will only be able to access data for their assigned locations.

4. Budget Management

Budget Levels

- Distributor-Level Budget
- Retailer-Level Budget (Rolling up to Distributor)
- Item-wise Budget
- Yearly / Monthly Budget Distribution
- Excel Upload Provision

Budget Controls

- Automatic budget validation during requisition
- Over-budget restriction
- Budget Amendment Workflow
- Multi-Level Approval

5. Requisition Flow

DF Requisition Process Flow:

Budget Creation → Approval → Requisition Raised →
Budget Validation → Multi-Level Approval →
PO / RFQ Decision → PO Creation → GRN → Asset Generation

Key Features

- PO-based or RFQ-based requisition
- Sequential / Parallel Approval
- Value-Based Approval Logic
- Email & WhatsApp Approval Link
- Document Upload (Retailer Photo, Agreement, Geo-tag)

6. RFQ & Vendor Comparison

- Vendor link-based quotation submission (No login required)
- Automatic email trigger
- Historical rate display
- Quotation comparison matrix
- Optional approval before PO creation

7. Purchase Order Management

Features

- Auto-population of data from approved requisition
- Payment terms based on master configuration
- Support for additional charges
- Auto-population of Terms & Conditions
- Drop shipment option
- Multi-Level Approval

8. GRN Process

Approved PO → GRN Creation → Invoice Upload → Approval → Stock Update

Controls

- Mandatory Bill Number
- Mandatory Invoice Upload
- Partial receipt allowed
- Location-based GRN login

9. Asset Creation & QR Code

GRN Approval → Asset Code Auto-Generation → QR Code Generation

Features

- Bulk asset creation
- Automatic QR code generation
- Customizable QR code information
- Warranty tracking
- Compliance document upload
- IT / Non-IT asset classification

10. Deployment to Retailer

Asset Created → Transfer to Distributor →
Transfer to Retailer → Acknowledgement → Delivery Confirmation

Required Customizations

- QR scanning at retailer location
- Physical verification capture
- Geo-tag validation

- Photo upload
- Delivery SMS notification

11. Asset Transfer Process

Transfer Flow

Transfer Request → Approval → Pickup Scheduling →
Dispatch → In Transit → Receipt Confirmation → Transfer Closure

Supported Transfers

- Location-to-location
- Distributor to Retailer
- Retailer to Distributor
- Retailer to Plant

12. Maintenance Module

Maintenance Flow

Issue Reported → Ticket Created → Diagnosis →
Warranty Check → Internal / External Vendor →
Repair → Quality Check → Ticket Closure

Supported Features

- Preventive maintenance (auto-scheduling)
- Breakdown maintenance
- External vendor service
- Invoice & photo upload
- Part replacement tracking
- Automatic next service scheduling

13. Physical Verification Process (Customization Required)

As per client workflow:

Scan QR → Validate Serial Number & Location →

Upload Photos → Approval →

Agreement Upload → System Confirmation

This process requires configuration customization.

14. Notifications

- Email notifications
- Approval alerts
- Budget exhaustion alerts
- Warranty expiry alerts
- Preventive maintenance alerts
- Delivery SMS (Optional customization)

15. Integration Requirements

- SAP B1 API integration (PO approval information)
- Excel import/export
- WhatsApp approval link
- Vendor email automation

16. Reports Required

- Budget vs. Consumption Report
- Distributor-wise DF Deployment Report
- Retailer-wise Asset Report
- Maintenance History Report
- Warranty Expiry Report

- Asset Aging Report
- Transfer History Report
- Audit Log Report

17. Customizations Identified During POC

Area	Customization Required
Post-Deployment QR Scan Approval	Yes
Retailer Physical Verification	Yes
Budget Retailer Roll-Up Logic	Confirmed
Delivery SMS	Optional
SAP Approval Sync	Integration Required

18. Non-Functional Requirements

- Role-Based Security
- Multi-Level Approval Engine
- Mobile Responsive Design
- QR Code Scanner Integration
- Audit Trail Logging
- OTP-Based Login

19. Assumptions

- Distributor & Retailer master data will be provided
- Approval hierarchy will be defined by the client
- Budget data will be available in Excel format
- SAP integration APIs will be available

20. Conclusion

The system is approximately 80–85% ready based on the standard ERP flow. Customization is primarily required in:

- Retailer-Level Verification
- QR Scan-Based Validation
- Post-Deployment Confirmation Workflow

After proposal approval, the next steps will include:

- Detailed Functional Mapping
- Timeline Planning
- Development & UAT
- Go-Live

Best Regards,

Adish Jain

Director, Shivit Technologies Private Limited H-141,

Third Floor, Sector 63

Noida, UP 201301

info@shivit.com 7503935107