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Sales Management Portal

Santhosh Kumar Reddy Bondalakunta  
*Governors State University*

Pavan Chityala  
*Governors State University*

Naveena Palle  
*Governors State University*

Ananda Rami Reddy Seelam  
*Governors State University*

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ABSTRACT

In the current scenario, there is a race in each professional field. It is also true for company's sales market. A sales pipeline database helps to take customers and sales to new levels and improve client’s retention. In this design document, it gives enhancing the application to make it User friendly and informative by implementing the below features

New Features:

1. User Interface changes - Look and Feel

2. Filtration – It Modifies the filtration based on the status of the Pipeline

3. Pipeline Status of the client - This Show the progress of each client

4. Reports- It is a feature to generate Report for each client and also the Overall Statistic Reports

Type of Project:

- Analysis and development
- Analysis and testing

The system has two levels Admin and user.

Admin Console:

The admin has an authority to plan, to organize, implement and direct (give guidance) to the users and setting targets and tracking the results

User Console:

When user tap on the project code, user will be navigated to the details page.

To examine the status, we are including a tab called “Dashboard”.

Dashboard:

To improve sales and to know the customers, with sales pipeline database we can track the sales through dashboard. In this, we can also find the profit and loss day to day. So, that we can plan
for future activities to increase our sales. This will free up our time and helps us to feel more control on our business.

**Notifications**

Also, thought of implementing notifications to remind the sales delivery dates through email.

So, Sales Management portal is the perfect online arena, where staff can find their clients information and can update client’s activities. So, that they can interact them easily and provide guidance to improve sales.

**Technical Details:**

1. Microsoft visual studio
2. Database: SQL server
3. C#
1. Feature Description

Sales Pipeline Management is backbone of the enterprise. It is well-worth a company’s time and effort to see it is firmly but flexibly established. Today most sales managers use sales pipeline. Individual sales professionals as well as small-scale business persons use sales pipeline to measure the demand for products and services. Irrespective of the service, a company is offering or we are selling, if the sales pipeline is managed efficiently then it will naturally result in greater user demand, stable outcome and consistent sales circles.

At the root level, sales pipeline management is simply about analyzing the status of the project and cash-flow incoming. Today, Sales pipeline solutions can be best identified as a business strategy. It helps in improving an organizations image and enables to make the best from any social networking scenario.

The main aim of the project is to approach a systematic selling of product or service.

1.1 Competitive Information

Now-a-days competition between companies are high. But Sales Pipeline Management strengthens company’s sales. In our project, we have provided Dashboard option, where customer can view the status of the project instead of calling or emailing the company regarding the status of the project. And we provide better opportunities for our clients. So, that sales increases.

- Pipeline Management is a primary factor in sales success. Sales Pipeline is the key to evaluating, managing, and ultimately improving your sales process.

- Sales Pipeline helps to track sales, visualize leads, and organize company's follow-ups.
Most importantly, a sales pipeline will give your business a wealth of information, such as why deals are won or lost, where our profits come from and how it is translated to sales, etc.,

This is a critical information that will help to improve company's sales process and help you to win more deals.

Using sales pipeline is the first step towards making you and your team 10X more productive.

Changes in Sales & Marketing process:

<table>
<thead>
<tr>
<th></th>
<th>OLD</th>
<th>NEW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing</td>
<td>Print, Conferences</td>
<td>Online keywords, email</td>
</tr>
<tr>
<td>Sales cycle</td>
<td>6-12 months</td>
<td>0-3 months</td>
</tr>
<tr>
<td>Implementation</td>
<td>Long</td>
<td>short</td>
</tr>
<tr>
<td>Support</td>
<td>More calls and waiting</td>
<td>Go online &amp; find answers</td>
</tr>
</tbody>
</table>

Why Sales Pipeline Management?

- More efficient
- Serving
- Create better clients
- More opportunities for improvement
1.2 Relationship to Other Applications/Projects

Our project describes about managing sales of a company. Similarly, but not completely, the other managing network like ‘throttle net’ which supports to enhance productivity and streamline for internal processes. These services provide how network effects our business in both positive and negative ways. But our Sales Pipeline Management provides complete picture of a proposed project from proposed date to end date.

Objectives:

- Sales Volume objectives (Monthly, Weekly, Daily)
- Opportunities schemes
- Collection objectives (Receivables/credit)
- Promotions
- Requirements of Clients
- Objectives of each Client we visit during the day.

1.3 Assumptions and Dependencies

Assumptions:

Every company owns their own Sales Pipeline Management. But it is more exciting to get more opportunities, more proposals outside of a project. Our project provides great opportunities to the clients and create records where client can rely on and we optimize sales process.

- We identify what are the different sales and services needs of Clients.
- How important are each of these services for Clients.

Dependencies:
To make changes in client info, Client need to contact manager to update changes. So, to change any client’s info, Client need to depend on project manager. Other than this we do not have any dependencies.

1.4 Future Enhancements

In future, we are planning to implement leads and lags of a projects from same client and planning to implement a code where client can edit their info but to save the updated changes manager need to confirm. Also, thought of implementing notifications to remind the sales delivery dates through email.

So, Sales Management portal is the perfect online arena, where staff can find their clients information and can update client’s activities. So, that they can interact them easily and provide guidance to improve sales.

1.5 Definitions and Acronyms

Server IIS – Internet Information Server
2. **Technical Description**

- **Technology** we used is **MVC.net**

MVC stands for Model View Controller. MVC is an architectural pattern which separates the representation and user interaction. It is divided into three broader sections like Model, View, and Controller. The following shows that how each section handles their role.

- MVC describes a way to structure our application and explains responsibilities and interactions for each part in that structure.

- Using MVC.net, Database is automatically created and is easier to use.

**Model**: Wrapping up data and logics

**View**: Output to the Client

**Controller**: Manipulating the data from model and generate the view.
Advantages of MVC:

- MVC handles the multiple views using the same enterprise model.
- It is easier to maintain, test and upgrade the multiple system.
- It will be easier to add new clients just by adding their views and controllers.
- It is possible to have development process in parallel for model, view and controller.
- This makes the application extensible and scalable.

<table>
<thead>
<tr>
<th>Web Server</th>
<th>Server IIS (Internet Information Server)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database</td>
<td>SQL Server</td>
</tr>
<tr>
<td>Technology</td>
<td>Mvc.net</td>
</tr>
<tr>
<td>Tools</td>
<td>Visual Studio and SQL server</td>
</tr>
</tbody>
</table>

Software Design:

- Well defined subsystem
- Well defined purpose
- It is easy to use
2.1 Application Architecture
2.2 Application Information flows

Following steps are the user usages for this project

GSU Sales Pipeline Management Portal is a software outlet that sells projects and this is controlled by Manager and the sales person has an access to enter complete information of the respective client. Home Page is a main page of the website which gives complete information of a company. Basic Home page looks like:

**Home Page:**

In the Home Page, we have About Us Page, Contact Page and Log In page.
About Us:
In this page, we can see the description of the application. Customers can see the complete description of a company about sales and services. Following is the about Us Page,

Contact Page:
In contact Page, Customers can see the contact details of the Customer Support from where they can contact and know the details about services and about projects.
Registration Page:

Register page is type of agreement to join the Portal. To register an account the control is given to sales person.

Log in Page:

Log in is a set of credentials to get access to the company’s network where one must enter their Username and Password.

Login page is directed to next page to Add Client.
Sales Person gets an access to enter the client’s info, contacts, opportunities, proposal and projects that offered to the clients.

Sales Person has only option to save the information of the client. Once after information is saved Sales person do not have any access to update changes that has entered.

Following are the pages to enter client’s info.

- **General Info:**

In this page, Sales person enters the complete information of the client.
• **Contacts:**

In Contacts Page, contact details of the client is entered by the Sales Person.

• **Notes:**

Manager will notify the status of the project and this notes is displayed on dashboard of the Client.
• **Opportunities:**

In opportunities page, Manager offers new opportunities according to the Client’s requirements.

• **Proposal:**

In this page, Client gets proposals about new projects.
• **Projects:**

In projects section, Projects that are offered by manager are e

**Manager Console:**
After Sales person entering the complete information of the Client, Manager has access to change or update an info of the Clients. Manager can edit or delete the information that is entered by Sales Person.

- **Dashboard:**

In this page, Client can see the announcements that are offered by manager to the client according to their requirements and they can view the status of the project.

- **General Info:**
In this page, Client’s information that has entered by the Sales Person is displayed on the Manager page and here Manager can edit/ update and delete the information.

- **Opportunities Page:**

In opportunities page, the offers that are offered by manager is entered and is displayed on dashboard. If manager wants to update or delete the information entered. Manager has option to edit/delete and can save. So Information is updated.
• Proposal Page:

Manager proposes new projects to the Client according to Client’s requirements.

2.3 Interactions with other Projects (if Any)

There is no interaction with other projects.

2.4 Interactions with other Applications

Applications like PayPal is needed for payments. But for now, we did not mention any payment posting application. When project is launched, we need external application like PayPal.

2.5 Capabilities

➢ Receptive User Interface:

UI presentation has been requested. This helps the website to be responsive and provides good ease to contact users.

➢ Well-defined Flow:
The flow has been extremely well-organized coordinated such that even nevertheless a change in a module will not alter the functionality of the modules.

- **Confined Illegal Access:**
  Unauthorized persons cannot get access to register. So first they should contact Sales support and they will have access to enter their info.

- **Password Encryption:**
  Password encryption strategies have been utilized so that no body encompassing the admin and manager would not be able to think each and every password. He will have direct access with the Username.

- **Exception Handling:**
  Exclusion Grasping has been requested such that whenever any errors occurred they are displayed in the dashboard.

- **Logging Levels:**
  Logging levels are requested in an extremely good manner.

- **Effective Data:**
  Data has been extremely well-organized employing sql server to furnish skills to prop in retrieving/adding/deleting/updating data.

### 2.6 Risk Assessment and Management

Following are the risks that may occur and if occurred how they are managed to minimize and avoid the risks:

<table>
<thead>
<tr>
<th>Risks</th>
<th>Managing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traffic issues</td>
<td>1. For flow of traffic proper balance is done by</td>
</tr>
</tbody>
</table>
1. Crash of application
   Production environment setup team takes if any application crash has been occurred.

2. Failure of code
   1. Testing and Support Team performs this action.
   2. Proper debugging must be done if failed after code deployment by using logging in definitive manner in our project.

3. Time Management
   Each member in development, testing, designing, database, etc. must reside to do their work in time which was assigned to complete the given project.

3. Project Requirements

3.1 Identification of Requirements

http://localhost:5580/: is the web link which redirects to home page. After Login, Manager and registered user to access the events, based on their roles the functionality will be going on. And for the development of this project we have followed the below shown requirements:

- **Specific** –

The specific target we made in our project is we introduced Search option by using filter keys and dashboard where announcements are displayed. In this project, we used sql server and
management studio to develop our project. Our team four members are involved in this project completion.

- **Measurable** –
  We four members in our team planned everything and successfully completed our project.

- **Achievable** –
  We achieved in introducing two new features i.e., search option where we can search by using filter and dashboard.

- **Realistic** –
  Results that are achieved by this project are any user can register, and the manager offers opportunities and proposes some projects to the clients based on the category selected.

- **Time-related** –
  We finished our project on 11/28/2016.

<SALES MANAGEMENT PORTAL-GSUEP-V_1_0 EVENT-CAPABILITY-012100)

### 3.2 Operations, Administration, Maintenance and Provisioning (OAM&P)

In this project, Manager has complete access in his control and the clients are to be given their complete information to the Sales person where Sales Person will have access to enter the clients, info and rest all is maintained by manager to offer new opportunities and propose new projects to the clients and when the client accepts the proposals or new opportunities that are offered to them. They are displayed in the dashboard. And Dashboard displays the status of the project like how much the projects has been done and what is remaining.

- **Manager Operation:**
Manager operates on Clients info changes and updates if any mistakes are to be changed and manager offers new opportunities to the client and proposes to take new projects with new offers.

- **Sales Person Operation:**

Sales Person operates on entering Client’s info. But sales person is not given any access to update changes. He is just need to enter complete details of the Client.

- **Client Operation:**

Client can only contact the Sales Person to get details before registering account. Later, Client can see the status of the project in dashboard section.

### 3.3 Security and Fraud Prevention

Every employee functions as an employee firewall at their workstation. We are very protective of our login credentials. We even send messages to our clients that if they receive any emails or calls like fraud, do not respond to this type of call or message and do not click on it. We will be cautious when dealing with clients of other countries.

- **Clients Problems and Needs**
  
  i. **Information:**

  What does Client see and hear?

  Where is that information coming from?

  ii. **Emotions:**

  What do Clients think and feel?

  iii. **Behavior:**

  What do they do?

### 3.4 Release and Transition Plan

The project is ready to be delivered and the plan of actions in transition are:
- Registration and entering Clients info.
- Project environment setup
- Designing & Coding
- Webpage testing and Debugging
- Handover of project

4. Project Design Description

Database Diagram:
Screen Shots of Applications Used:

Microsoft Visual Studio:
We used Mvc.net in which database is automatically created. We can view the database diagram relationships in the SQL server Management Studio.

5. **Internal/external Interface Impacts and Specification**

Updating user documentation, External Interface Specifications, and or Application Interface documents does not affect project functional and design architecture.

6. **Design Units Impact**

6.1 **Functional Area A/Design Unit A**

- Quality of the project
- Payment
- Status
- Scope
- Communication between client and manager
6.2 Requirements

➢ Payment details, cancellations.
➢ Managing functions
➢ Admin and authentication requirements
➢ Client requirements

7. Open Issues

➢ Technical issues like software problems like coding and software problems.
➢ Management issues includes in business environment.
➢ Issues with clients like collecting information.

8. Acknowledgements

Before we get thick of things, I would like to add a few words of appreciation for the people who have been a part of this project right from the beginning. The writing of this project has been one of the significant academic challenges I have faced and without the support of my team members and their patience and guidance of them involved, this project would not have been completed. It is to them I owe my deepest gratitude.

It gives me immense pleasure in presenting this project report on 'SALES PIPELINE MANAGEMENT'. It has been my privilege to have a team of project guide who have assisted me from the commencement of this project. The success of this project is a result of sheer hard work and determination put in by me with the help of my project guide.

I hear by take this opportunity to add a special note of thanks for our Project Adviser Prof. Alex Liu, his wisdom, knowledge and commitment to the highest standards inspired and motivated me. This project is dedicated to all those people, who helped me while doing this project.
9. References


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ACFVOPaQodVZwC540B6AOch5EByIAU0zxDwAwSGQBtOoqQRSTneSJM3bl7LbyLCJf0kRLqYa4
10. Appendices

Appendix 1: Overview of Project.

Appendix 2: Project Technical Description of the project.

Appendix 3: Flow of Project.

Appendix 4: Risk Management.

Appendix 5: Design modules.

Appendix 6: Functional Areas.