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Sales Management Portal

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ABSTRACT

SALES MANAGEMENT PORTAL

✓ IDE: Visual Studio 2013
✓ DATABASE: MICROSOFT SQL SERVER 2008 R2 MANAGEMENT STUDIO
✓ LANGUAGE: DOT NET
✓ FRAMEWORK: MVC
✓ SCRIPTING: JavaScript and JQuery
✓ TECHNOLOGY: Entity framework and Entity Data Model (EDMX)
✓ Skills used HTML, CSS, JavaScript, JQuery, Bootstrap navigation, Entity framework, EDMX

PROJECT FUNCTIONALITY

❖ User login and logout
❖ User authenticate and authorization
❖ Dashboard with Current Client List
❖ Current Client Details View
❖ Search Client List by Client Name and opportunities type.
❖ Add New Client
❖ Add New Announcement
❖ Announcement Details View with Date Wise
❖ Website navigation
❖ Responsive Design
❖ Websites Cookie maintain
EXPLANATION:
Our project aim is to design a Sales Management Portal which is helpful for an organization to provide flexibility to interact with the users and clients. Current design is mainly focused on the manager user.
In this project, we have provided the features like,
1. A search option: where manager user can track information of clients and all the users. Which was a major requirement.
2. Manager Console: Manager can create user accounts, can send messages and view details
3. Pipeline Reports: Manager can run various reports such as,
   - List of prospects
   - Reports of opportunities
   - By date, by month, sales person

This project reduces the time that takes to search for the clients, users in the database.

- All the users who uses this portal will get notified about the important information through notification option. This makes easy for the users prepare for the task after getting notified. And, also its beneficial to managers to intimate users by a single message.

- Manager can make notes related to the project. So, that he can check his important information that stored in the notes. This makes easy to manager that he cannot miss any information during the project deal.

- Manager can send messages to all the users by using message option. This makes easy to manager that he can convey his information by using message option.

- Manager can store all the information about the project and can export all the information to an excel file. This makes easy to send information through email to others.

- Manager can edit, view and delete information this makes manger to trash information which is not necessary or no use.

- This website does not replace any existing application or website. It’s completely a newly designed website.
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1. Feature Description
1.1 Competitive Information

This project does not have any competition with any other applications or products or services. It is designed based on the university requirement for its internal use.

1.2 Relationship to Other Applications/Projects

Our project is not similar with any projects. It is designed for our individual practice test for the course.

1.3 Assumptions and Dependencies

New functionalities are not implemented in this project.
Any application, services, capabilities, service or capability is not depended on this project.
There are lots of changes we can do this project. They are like,
We can provide filter option for client or user search
And, we can develop excel or word option so that the information that we generate will be exported to MS word or MS excel.
We can also develop project search by implementing filter and can introduce chat option for better communication between employees.
We can build a platform where users can share information related to the organization.

1.4 Future Enhancements

New functionalities are not implemented in this project.
Any application, services, capabilities, service or capability is not depended on this project.
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We can also develop project search by implementing filter and can introduce chat option for better communication between employees.
We can build a platform where users can share information related to the organization.
1.5 Definitions and Acronyms

MVC – Model View Controller
HTML- Hyper Text Markup Language
CSS- Cascading Style Sheet
JQuery- Java Query

2 Project Technical Description:

RAM: Minimum: 1GB
Hard Disk: Minimum 32 GB
Processor: Min: Core2Duo
OS: Win 07 or Mac OS Cheetah
Database: SQL server 2008
Front end: .Net (Visual Studio 2012)
2. Technical Description
2.1 Application Architecture
2.2 Application Information flows

DFD: Data Flow Diagram:

[Diagram showing data flow through various stages such as Login, New Client?, Add client information, Contacts, Search Client, Manager can comment or give instructions, Notes, Opportunities, Projects, Proposals, Accepted.]
2.3 Interactions with other Projects (if Any)
This design does not have any interaction with any other project design.

2.4 Interactions with other Applications
This project does not have any similarities with any other applications.

2.5 Capabilities
For this project, we used SQL server 2008 to store the data into the database. It provides data insertion, deletion and editing information.

For the front end, we used, Visual Studio 2012 for development of the project. It provides code writing, debugging, compiling and execution.

2.6 Risk Assessment and Management
By developing this project there will not be any risks except the security issue. For that, if you are using Windows operating system then make sure use genuine version of the anti-virus should be installed if it is Macintosh operating system then it not required of any anti-virus since it has inbuilt anti-virus in it.

3 Project Requirements
3.1 Identification of Requirements
* Specific – Import and export an excel sheet option needs to implement.
* Measurable – We have implemented import to excel option and its under progress.
* Achievable – There are lots of features can be implemented as I mentioned above, import and export excel sheet option and editing client or project information and upload/delete pictures option can also be implemented. Information sharing option between users can also be implemented.
* Realistic – Import/export option, editing client/project information, information sharing option, upload/delete user picture.
* Time-related – If the time given, can take 14 days to complete these tasks.

3.2 Operations, Administration, Maintenance and Provisioning (OAM&P)
To keep all the data safe, daily backup is needed. Admin should implement its task on the daily basis.
3.3 Security and Fraud Prevention

Security should always be a high priority task for any organization or project. Required security measures should be implement whoever use this product.

User authentication should be provided based on the privileges.
Access should be limited to normal user
Necessary security tools should be used to monitor, detect if any issues found.

3.4 Release and Transition Plan

Explain how the project will be deployed to customer, or update from current release to newer release.

This is a login page where user provides user id and password to enters the website.
To create a new account, you can click on the signup option and create a new account by providing your first name, last name, email id and password.
This screen gives us information on the client details like First name, Last name, Company name, Opportunity type, Proposal name, Project name, and Actions.

We can see the ‘search’ option where we can search for the clients or users in the system.
This screen gives information about client details.
The above screen gives information about the ‘General Info’ form details like Company name, Telephone, Fax, Address, Country, State, City, Zip-code, Division, Type, Industry and Website if have any.
The above is contact page where you have enter details like First name, Last name, Title, Phone, Fax, Email id.
The above screen is a ‘Notes’ page where user can make notes of any important information, save it and check it later.
The above page is an Opportunities page where we have designed options like Opportunity name, added by, Date added, Estimated budget, opportunity duration, opportunity type and if we want we can make notes of any opportunity.
The above screen gives information about the project name, project manager, Project budget, Project description.
The above screen tells us about the announcement section. This is a best way to send notifications to all the users about the meetings, discussions, daily activities and more.
The above screen gives us information about the accounts that created on this system and their details. If you want to change password or delete user, this page will be helpful.
The above screen tells us about the notifications that created or posted.
This page is useful to create message and send it to a single user
This page will give detailed information about the project deals that made and its status.
### Proposal Reports

<table>
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<tr>
<th>ProposalName</th>
<th>AccountManager</th>
<th>DueDate</th>
<th>ChancesToClose</th>
<th>EstimatedBudget</th>
<th>ProposalDuration</th>
<th>ProposalBudget</th>
<th>TotalRevenue</th>
<th>ProposalStatus</th>
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### Project Reports

<table>
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<tr>
<th>ProjectName</th>
<th>ProjectManager</th>
<th>StartDate</th>
<th>TotalRevenue</th>
<th>ProjectDuration</th>
<th>ProjectStatus</th>
<th>Launch-date</th>
<th>ContactName</th>
<th>Contact/Telephone</th>
<th>ProjectDescription</th>
<th>ProjectNotes</th>
</tr>
</thead>
</table>
If a user wants to know which user is logged into the system, then we can see it from here. And if a user wants to logout from the system then we can simply click on logout.
The above screens denote about the C# coding that implemented for different pages.
The above screen gives information about the database tables that we created for this design.

4. Project Design Description

**PROJECT FUNCTIONALITY**

- User login and logout
- User authenticate and authorization
- Dashboard with Current Client List
- Current Client Details View
- Search Client List by Client Name and opportunities type.
- Add New Client
- Add New Announcement
- Announcement Details View with Date Wise
- Website navigation
- Responsive Design
- Websites Cookie maintain
5. Internal/external Interface Impacts and Specification

No impacts

6. Design Units Impacts

No impacts

6.1 Functional Area A/Design Unit A

6.1.1 Functional Overview

- All the users who uses this portal will get notified about the important information through notification option. This makes easy for the users prepare for the task after getting notified. And, also its beneficial to managers to intimate users by a single message.

- Manager can make notes related to the project. So, that he can check his important information that stored in the notes. This makes easy to manager that he cannot miss any information during the project deal.

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- Manager can edit, view and delete information this makes manager to trash information which is not necessary or no use.

6.1.2 Impacts

No impacts

6.1.3 Requirements

In this project, we have provided the features like,
A search option, where manager user can track information of clients and all the users. Which was a major requirement.
Manager Console: Manager can create user accounts, can send messages and view details
Pipeline Reports: Manager can run various reports such as,
- List of prospects
- Reports of opportunities
- By date, by month, sales person
6.2 Functional Area B/Design Unit B
6.2.1 Functional Overview

In this project, we have provided the features like,
A search option, where manager user can track information of clients and all the users. Which was a major requirement.
Manager Console: Manager can create user accounts, can send messages and view details
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<thead>
<tr>
<th>PROJECT FUNCTIONALITY</th>
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<tbody>
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<td>Search Client List by Client Name and opportunities type.</td>
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<td>Add New Client</td>
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<tr>
<td>Add New Announcement</td>
</tr>
<tr>
<td>Announcement Details View with Date Wise</td>
</tr>
<tr>
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No impacts.

6.2.3 Requirements

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Manager Console, Manager can create user accounts, can send messages and view details
Pipeline Reports: Manager can run various reports such as,
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  - Reports of opportunities
  - By date, by month, sales person

7. Open Issues

No open issues

8. Acknowledgements

This document created by myself. I would like thank my professor Mr. Liu and Miss Nancy Rios who helped me in creating this document.

9. References

All references should include, author, title of document, doc ID# and issue date.

10. Appendices

No appendices