Sales Management Portal

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ABSTRACT

In this project we are designing company’s sales pipeline database portal. This sales management port

In this project we are designing company’s sales pipeline database portal. This sales management
portal plays very important role in any company, the profit and success of the company rely on
sales management. This management portal holds the information of clients and their contact
information, this information will useful to know the requirements and to make proposals with
them. If these proposals approved by the manager then that proposal become a project to the
company.

This portal also enables the company manager to get up to date with their work progress, and gives
updates to sales staff simultaneously. The manager can view the client information entered by the
sales staff so that if the manager likes client proposal he can leave comments to them. In this portal,
the sales staff keeps the client’s general information includes their general information, contact
information, proposals and their projects.

This Sales management portal is user friendly any customer can sign in and they can view the
project progress. They can find whatever they are looking for in very short time by typing their
requirements in the search box, this saves customer time and risk. Managers, sales staff, and users
can view the client’s information through this portal.

In this we are going to working on two modules.

1) Manager Module
   2) Sales Staff Module

Manager Module: In this module manager can view user information, sales staff information,
client’s information and their contact details, proposals, and projects. If manager likes the client’s
proposals he can accept the project otherwise he will reject. And he also up to date with what are
they are working and progress report. Manager can give guidance and send messages to the sales
staff. He can also leave comments to clients. He can edit/ delete/update of the present or before
projects.

Sales Staff Module: In this module sales staff enter the details of clients. Later the manager will
view them, if it accepted it become a project. The sales staff module get the clients information
who have good proposals that will useful for their company. They will give updates to the manager
and receive replies from them.
Hardware Requirements:

1) Intel Pentium 600Mhz or above
2) Hard disk 968KB
3) RAM 1GB

Software Requirements:

2) Database : SQL SERVER 2008
3) Languages : C#.Net, ASP.Net
4) Scripting : Java Script
5) GUI Tools : VS.NET2008
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1. Feature description

This is a reasonable outline for an organization's business pipeline database portal, through which deals staff enters customers’ data into pipeline by keeping logs of contacts and exercises, openings and proposition, and inevitably extends. The portal enables administration to manage works and track advances, and meanwhile to collaborate with and give direction to deals staff convenient.

This portal should have a responsive outline so it will change in accordance with assorted resolutions, making it simple for clients to explore the portal on their own devices.

GSU Corporation is a world-prestige supplier of correspondence arrangements. It offers a progression of correspondence equipment, programming and incorporation administrations. GSU's business office keeps up its business pipeline database through Sales Management Portal.

Implementation modules:

- Homepage
- Signup/Login page
- Announcements
- Customers
- Contact list
- Opportunities
- Proposals
- Projects
- Users

Targets:

- Improve the speed of managing customers’ data by Sales clients.
- Improve the exactness of the rundown of customers’ data by indicating effectively to Sales clients.
- Improve the exactness of the managing customers’ data.
- Reduce the time and work to manage customers’ data, in view of specific Sales client.
- Reduce cost and helps in quicker execution.
1.1 Competitive Information:

Competitive Information means finding data about your competitors. It helps us to find who your competitors are as indicated by their age, capabilities, information level, involvement in Sales Management portal by keeping up sales pipeline.

You can also be able to find how they promote and execute the customers’ data. From this, we run over different inquiries like What do they do with the customers’ data? Why Sales Users come to customers’ data? For this you should go to every single customer data sorted out by your rivals and afterward make a venture report or proposition report.

The reports will contain things like

- Project names or Proposal names
- Project Manager names or Proposal contact director names
- Project made dates and dispatch dates or Proposal made date
- Projects assessed spending plan or yearly income and venture span alongside the venture status
- Contact points of interest of customers (for whom the customer is sorted out) or extend contact data
- Proposal evaluated spending plan and status of proposition

Discover however much data as could reasonably be expected about customers composed by your rivals.

1.2 Relationship to Other Applications/Projects

This project (Sales Management Portal) do not have relationship with any other projects or applications.

1.3 Assumptions and Dependencies

Efficient planning ready for venture achievement essentially relies on upon the correct explanation of the limitations and presumptions. Why are requirements and suspicions in venture administration is so vital? The answer is that since setting legitimate venture limitations and suppositions makes ready for satisfactory hazard investigation, effective venture arranging and opportune venture conveyance.

New functionalities like more proficient approach to inquiry customers in Sales Management entryway, dealing with various deals clients and numerous customers data at once utilizing deals administration database. The Manager ought to likewise have the capacity to run different reports, for example, rundown of recommendations, customers or ventures.

This project won't utilize some other applications like third party applications or outer applications.
1.4 Future Enhancements

Future Implementation Modules:

- Various Reports, for example, rundown of Client Projects or Proposals or Contacts or Opportunities in view of specific dates between begin date and end date.
- Improves GUI with new advances.
- Reports for Proposals or Projects utilizing Excel documents or XML records.

1.5 Definitions and Acronyms:

What is a Sales Management Portal for?

In the event that you need to achieve the following stride in your procedure, the entrance is the thing that you venture through to land there.

Software Requirements Specification:

It is a depiction of a specific programming item, program or set of projects that plays out an arrangement of capacity in target environment.

Sales Management Portal:

GSU Sales Management Portal overseeing deals clients and overseeing customers’ data of offers clients.

Client:

It can be depicted as organization contacts data of various title parts and it contains proposition, activities and openings.

Proposal:

Proposal is particularly gone for an all-around characterized and constrained action.

Project:

The characterized extent of the venture ordinarily incorporates the authoritative understandings between the customer and the specialist organization.

Contact:

Contact is a man or an office serving as the facilitator or point of convergence of data concerning a movement or a program. Contact is utilized as a part of many situations where data is time-touchy and precision is essential.
2. TECHNICAL DESCRIPTION

2.1 Project/Application Architecture:

This approach, known as the Model View Controller (MVC) or Model 2 engineering. It will tell you about every innovation and on what it exceeds expectations at. The first demand is taken care of by a Servlet.

![Diagram of project/application architecture]

Model

View

Controllers
MVC:

Demonstrate View-Controller (MVC) is a building example that isolates an application into three primary intelligent parts: the model, the view, and the controller. Each of these parts are worked to handle particular advancement parts of an application. MVC is a standout amongst the most as often as possible utilized industry-standard web improvement structure to make adaptable and extensible activities.

MVC Components:

**Model:** The Model segment compares to every one of the information identified with the rationale that the client works with. This can speak to either the information that is being exchanged between the View and Controller segments or whatever other business rationale related information. For instance, a Customer protest will recover the client data from the database, control it and redesign the information back to the database or utilize it to render the information.

**View:** The View part is utilized for all the User Interface rationale of the application. For instance, the Customer view would incorporate all the UI parts, for example, content boxes, dropdowns, and so on that the last client communicates with.

**Controller:** Controllers go about as an interface amongst Model and View segments to process all the business rationale and approaching solicitations, controlling the information utilizing Model part and communicate with the perspectives to render the last yield. For instance, the Customer controller would handle every one of the connections and contributions from the Customer View and redesign the database utilizing the Customer Model. A similar controller would be utilized to see the Customer information.

2.2 Application Information Flows

**Start:** Sales Management portal has start up screen having login page where user or manager can login using their login details. If they don’t have an account, they can create a new account using signup button.

**Manager Module:**

1. Manager can add an employee
2. Manager can delete an employee
3. Manager can update employee details
4. Manager can review employee details
User Module:
1. User can add a client
2. User can delete a client
3. User can update client information
4. User can review client details

Announcements Page:
This page helps to communicate with the people who are working in the company.

Customers Module: This page contains information of all the clients i.e., company name, phone number, address, type of industry and source. Using search option, we can search by particular name.

Projects: This page holds the information of all the projects. It contains details of project name, contact person, project manager, launch date, status of the projects, Notes and actions. Everybody can see this information.

Users Module: This module has details of all the users who is working on different projects. Like user name, email id, date of birth, gender, role in company etc.,

2.3 Interaction with other projects:
Sales Management Portal has no interaction with other projects

2.4 Interaction with other applications:
Sales Logic is one of the application similar to this sales management portal. The only difference between these two applications is to forecast the sales. In sales Logic depending on the detailed report of projects completed and projects in cycle forecasting is done. And also, client can register and add an opportunity by himself. We can extend our application with this sales logic by generating reports and using them to forecast the future sales.

2.5 Capabilities:
Capabilities of sales staff:
1. Add/delete/update the client information
2. Add/delete/update opportunities
3. Setup meetings with the client and make notes on progress
4 Make proposals
5 Capabilities of manager:
6 Add/delete/update the staff information
7 Add/delete/update the client information
8 Approve/deny projects

2.6 Risk Assessment and Management:

In a few segments, we discovered dangers in this venture in MySQL database. Those are at times the database did not work appropriately in light of security mistakes or port blunders MySQL database. The port numbers ought to be kept up by firewall assurance, likewise don't introduce any related programming on this port numbers and don't change passwords. This hazard is not settled in my venture but rather keeps up the information everything in database.

Three basic areas in a venture plan are: Assumptions, Risks, and Dependencies. All presumptions are dangers, you're simply not anticipating managing them. On the off chance that it was dependent upon me, "expect" would be banned from venture arranges. Conditions are comparable. On the off chance that a reliance has as of now been fulfilled, then it essentially "is". On the off chance that a reliance has not as of now been fulfilled, then there's a hazard that it won't be fulfilled. You don't oversee conditions; you deal with the hazard that conditions won't be met in an auspicious manner.

This procedure of examination turns out to be significantly more imperative in the arranging procedure for new customers. An inability to survey the dangers required in gateway can be awful as a consequence of:

• Loss of notoriety
• Financial misfortune
• Damage to offices
• Over-resourcing of one target prompting to under-resourcing of different destinations

The initial phase in arranging any new customer is to lead an attainability concentrate on. The reason for such a study is to recognize and survey the advantages and dangers of the customers, and to distinguish what issues should be fathomed in order to effectively organize the customer.

The achievability investigation ought to plan to recognize any dangers, for example,

• The adequacy of lead time to compose the customer
• The name of customer and whether it conflicts with whatever other organization name that may essentially influence the achievement of the customer
• The spending plan and whether the customer can keep running without bringing about a misfortune
3. PROJECT REQUIREMENTS

3.1. Identification of requirements:

<GSU-GS_SP2016-1 Announcements-Capability-000100>
Project must allow to create, update, delete announcements by the sales manager
Implementation: Mandatory
Sales Management Portal allow Manager to update, create or delete the announcement

<GSU-GS_SP2016-1 Search-Capability-000200>
Project must allow users to search particular name by alphabetic
Implementation: Mandatory
Sales Management Portal allow users to search projects by project name

<GSU-GS_SP2016-1 Contact List -Capability-000300>
Project must allow manager to create contact list with the clients
Implementation: Mandatory

<GSU-GS_SP2016-1 Opportunities-Capability-000400>
Project must allow manager to create opportunities for the clients
Implementation: Mandatory

<GSU-GS_SP2016-1 Proposals-Capability-000500>
Project must allow manager to create proposals with the clients
Implementation: Mandatory

<GSU-GS_SP2016-1 projects-Capability-000600>
Project must allow manager to approve or delete the projects
Implementation: Mandatory

<GSU-GS_SP2016-1 user -Capability-000700>
Project must allow manager to give particular roles to a person.
Implementation: Mandatory
3.2 Operations, Administration, Maintenance and Provisioning (OAM&P):

Sales Management Portal does not give any reinforcement information or blame tolerant issues and routine systems of support. In future, we have to create information reinforcement utilizing CD/DVD or Excel or Xml records to store every one of the Sales Management entry clients and customers’ data information.

3.3 Security and Fraud Prevention

Security Management incorporates planning, get ready and executing security arrangements and techniques for entry i.e. the most effective method to shield web application from programmers or securities on frameworks like:

• By ensuring that the creating database questions are not influenced by programmers.
• By ensuring that this product application framework have antivirus and firewalls on and look after securities.

3.4 Release and Transition Plan

Sales Management portal can without much of a stretch incorporate on any System with a product like window or Linux or OS Mac since we built up this product on .NET. So .NET can run anyplace on this world once we compose the code. Clients must have web to effectively access from anyplace in this world. Feasibility will be inspected to coordinate this venture with whatever other stages.
4 Project Design Description

The Sales Management Portal has two modules one is admin module and another is sales staff module.

Sales Staff Module:

Initially this Sales Staff Module has login page. People who are working as a sales staff they had their own login id and password. There is sign up option for the new employees to create usr id and password. This sales staff gather information about new clients and their proposals. This is very important for the company to get new projects. Sales staff has access to store the all the client information, send notes to the admin, create announcements. Here I am providing screen shot of the sales staff module from the project.

The above screen shot shown the sales staff module. They have access to create new customer. The search engine makes less work to search the particular client information by entering a single letter of the company name, and have access to view, edit, delete the particular customer information. They can create any announcements of the company like if they want to conduct events or intimate the information to the people who are working for their company.

Admin module:

This Admin module is also same like a sales staff module. It has login page. They login to the portal by entering their username and password. Have option to sign up for the new admins. In this we can see all the client information that was entered by the sales staff, but admin do not have access to enter the new client information. Admin can only view the data entered by the sales staff. After he viewed the proposals of the clients, he can approve/ reject their proposals.
He can access to send mails to the sales staff. He also has access to make announcements same like in the admin module. Here I am providing screen shot of the admin module.
Database Design:
5 Internal/external Interface Impacts and Specification

The system allows the Sales Users to select the Managing clients module. Under this module, you can select a particular client or create a new client and delete a particular. It also shows all the clients to Sales Users.

6 Project Design Unit Impacts

The following data shows the Design Units and Impacts of the Sales Management Portal.

6.1 Functional Area A/Design Unit

6.1.1 Functional Overview

Admin Module, in this module initially we have login page, by this functional area we can register new Admin. They need to provide their first/last names, date of birth, email id and need to provide new password for the account. User can login to the sales management Portal by entering their user id and password, those were created previously, need to enter correct user name and password otherwise admin cannot login to the portal. User can view announcements, top customers, ongoing projects, potential prospect at home page. User can view only announcements created by the either admin or Sales Staff. These events include group meetings, reminding deadlines of the projects etc. we had search engine, In this functional area user can search the customer by entering a single letter of a customer name or company name. User can make announcements and edit/update/delete any information and also has authority to view everyone details.

Sales staff, by this functional area user can login to the sales management Portal by entering their user id and password, those were created previously, need to enter correct user name and password otherwise admin can not login to the portal. Sales staff has authority to create new customers and send messages to manager and clients through announcements feature. They also have search engine so that they easily search particular customer information by entering one word of company name or client name. they do not have authorities to project approval. They can also have authority to view the all the staff members information who ever working in the company.

6.1.2 Impacts

As impacts it will create new User Id and Password for the admin and Sales Staff. And admin has all the authorities to do everything he can create new customers, able to see all the all the projects those were accepted previously. manager can view user information, sales staff information, client’s information and their contact details, proposals, and projects. If manager likes the client’s proposals he can accept the project otherwise he will reject. And he also up to date with what are they are working and progress report. manager can give guidance and send
messages to the sales staff. He can also leave comments to clients. He can edit/ delete/update
of the present or before projects.

6.1.3 **Requirements**
For this design module, each feature has related tables, views and modules.

### 7 Open Issues

There is no open issues in Sales management portal project.

### 8 Acknowledgements

First of all, I would like to take this opportunity to thank the Governors State University for
having projects as a part of the MS curriculum.

Many people have influenced the shape and content of this project, and many supported me
through it. Express my sincere gratitude to prof. Alex Liu for helping me throughout my project
Sales Management Portal which is an interesting and exhaustive project.

He has been an inspiration and role model for his project. His guidance and active support has
made it possible to complete my project successfully.

### 9 References

1 Munyon, Timothy P., Summers, James K., and Gerald R. Ferris. Team staffing modes in
organizations: Strategic considerations on individual and cluster hiring approaches. Human
2 Spiro, Rosann L., Gregory A. Rich, and William J. Stanton (2008), Management of a Sales
Signup Page:

Welcome to the Portal! To continue, please enter your email address and set a password.

First Name*
Last Name
Gender* - Male, Female, Other
Email Address*
Password*
Confirm Password*
Date Of Birth

Sign Up | Cancel

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Sign in:

Index:
Announcements:

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## Projects

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## Users

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<td>Female</td>
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