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Sales Management Portal

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ABSTRACT

GSU Sales portal is a portal which provides a sales pipeline through an application with a conceptual design for the database where the sales staff enters client's information into this portal which keeps track of contacts and activities, client information and incoming requests from future clients. The portal has different modules to function efficiently.

- **User Management:** This allows addition of new managers and manager could add more sales login and user logins.
- **Opportunity management:** This allows addition of new opportunity type.
- **Proposal management:** This module will contain all the new proposals and existing proposals.
- **Projects view:** This module will contain all the projects and sales users can add new projects into this module which can also be viewed.

Technical Specification:

- ASP.NET
- Database: Microsoft SQL Server 2008
- Tools: Microsoft Visual Studio 2015, Microsoft SQL Server

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1 Project Description

1.1 Competitive Information

The sales management portal is practical application of sales technics of a company's functions. It is a conceptual design for a pipeline based database portal where the sales team record the client's information by keeping track of contact information and functions and projects. This portal enables the sales team to track the progress of each project and also maintain a communication between the team members to function side by side. This portal has a responsive design which has the capability to fine-tune itself according to different scenarios like users being able to manage their own account and features.

1.2 Relationship to Other Applications/Projects

This portal tracks client information and enables the sales team members have an uninterrupted communication between each other. Using this portal, the sales team can track the current projects, their progress and stay in track of the project, manage new proposals and communicate with the administrator and the manager.

1.3 Future Enhancements

This portal currently works only with a browser on any computer device which supports a web browser. We are planning to add this as a mobile application on android and iOS which would make it even more easier and efficient. Making this portal on a mobile device as an application would make it easier for the users to make use of this service on the go.

1.4 Definitions and Acronyms

Admin: Admin has all the functionality and can view and alter account settings and manage the whole application. The admin is also the super user.

Manager: The manager is the one who can accept and approve a proposal, assign tasks and add sales staff.

Sales Staff: They are the actual users of the portal who keep track of the progress of the projects and report to the manager.

2 *System Requirements*

Hardware:

The hardware is the actual physical components of a computer organization comprising of the processing unit, storage devices, input and output devices. Operating system is the software which does the computing and the storage devices are used to store and manipulate the results. The following are the system components used to run this portal.

Specification:

Processor : Intel 6th gen i5
RAM : 8GB RAM
Hard Disk : 500GB

Server Hardware:

Min. 80GB hard disk
Ram 1 GB
Windows Server OS

Client Hardware:

Local Area Network

3 *Project Technical Description*

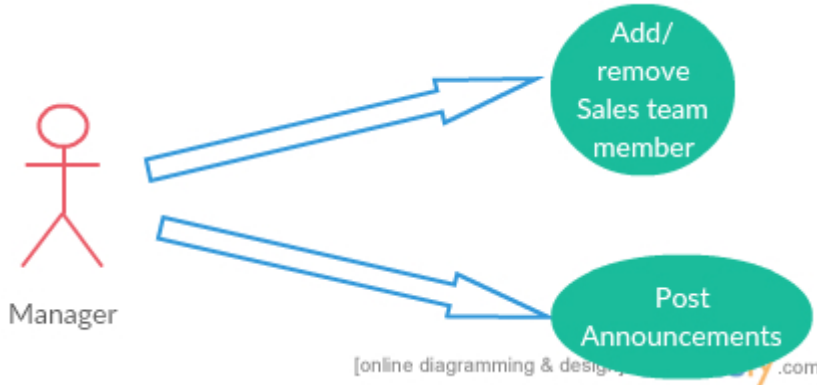
This portal is a combination of different web pages with the login page being the initial page. The user can enter the login details and the home page opens up according to the credential entered(admin, manager or the sales team member. The front end of the portal is designed using ASP.NET and the data is stored in the database which is set up in Microsoft SQL Server Management Studio. This portal can be used by any sales management team.

3.1 *Application Architecture*

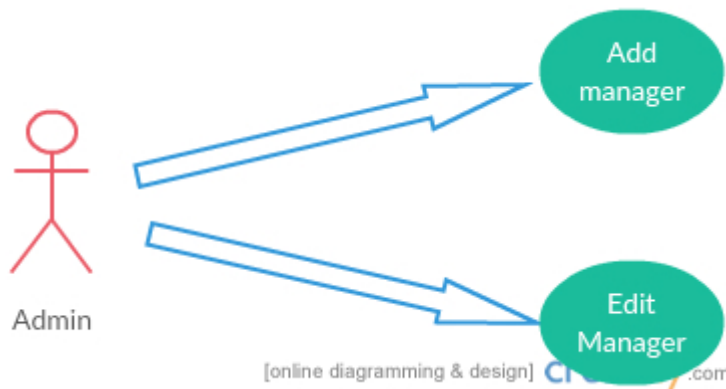
This sales management portal has different webpages such as Login page, Admin home page, Manager home page, Sales team Home page, Client type page where the different clients can be viewed, Opportunities Management page where different opportunity can be viewed, Proposal page where the proposal from different clients can be either accepted or rejected and finally the projects page where the current accepted projects can be viewed and managed.

3.2 Application Information flows

The Admin functions are portrayed in the diagram below.



The manager functions are portrayed in the below diagram.



3.3 Interactions with other Applications

As this is a communication portal other applications such email client application and other medium of online communication can be incorporated along with this portal. List all possible interaction with other application, and what are needed to address these interactions.

3.4 Capabilities

This portal has a lot of capabilities where the admin has the capability to add new managers. The manager has the function to post announcements and add new sales team member. The sales team members can view the announcements, view the client type, view and manage opportunities, view proposals and projects.

3.5 Risk Assessment and Management

This is a crucial part where the risks might jeopardize the whole project. The main risk in this project would be the duplication of data which is prevented by using primary ID key for every database used in this project. Normalization plays an important role in managing this duplication of entities.

4 Project Requirements

4.1 Identification of Requirements

The first step in any project development is the identification of the requirements. Each step was carefully taken into account and the requirement was finalized. The SMART criteria was used to determine each and every requirement.

Functional Requirement:

<GSU-GSU_SMP-01 -Login Page-100>

The portal must allow a login page where the admin, manager and the user will enter the login credential and login into the portal.

<GSU-GSU_SMP-02 -Home Page-00101>

The portal must allow a page common to all the users but different features are available according to their roles and function.

<GSU-GSU_SMP-03 Create Manager-00102>

The portal must allow where the Admin can create new managers and reset their passwords.

<GSU-GSU_SMP-04 -Create Sales-00103>

The portal must allow where the manager can create new users and reset their passwords.

<GSU-GSU_SMP-05 -Announcement Page-00104>

The portal must allow where the manager can create announcement and publish them at any date.

<GSU-GSU_SMP-06 -Projects Page-00105>

The portal must allow a page which displays all the current accepted projects with their details.

<GSU-GSU_SMP-07 -Proposals Page-00106>

The portal must allow which contains the information about the proposals made by the clients and can be accepted or rejected by the sales team.

<GSU-GSU_SMP-08 -Opportunities Page-00107>

The portal must allow a page where new opportunities which are available from the clients which has the field related to it and more information about the proposals.

<GSU-GSU_SMP-09 -Clients Page-00108>

The portal must allow a page where all the current clients are listed with their details.

4.2 Operations, Administration, Maintenance and Provisioning (OAM&P)

The portal has three different kinds of users. The admin will have the authority to add managers and delete manager accounts. The manager will be able to post announcements and add new sales team members. Sales Team members will have the access to new proposals and functions which are applicable only to their roles. The admin will have the role of database management and recovery of data. Admin can only add new managers and remove managers.

4.3 Security and Fraud Prevention

Every user has a dedicated login credential which they'll use to login and access the data available. The admin will have the capability of resetting the password of the managers and will have no control over the sales team member. The manager can create new sales team member and post announcements.

4.4 Release and Transition Plan

The project is ready to use and will be available to use immediately and the release date is planned to on 11th of December 2016.

5 Project Design Description

The design of any project is based on what the outcome should be and what all are the functionalities the user expects out of it. The design is placed over the kernel of the software engineering methods.

Requirement gathering is the first phase and then comes the design part where all the requirements are implemented into the design phase. After the requirement phase the design phase was based on the requirements.

We started off by developing the front end of the website using ASP.NET. We choose C# because of the varied features and flexibility in use. We divided the webpages according to the requirements. We used the Visual Studio from Microsoft which had all the features we needed and we started to build each individual page. The portal needed a place to save all the data being generated and we decided to use SQL server for the database management. All the webpages were made responsive and were interlinked. The database was connected to the webpages and the website started working effectively and then we went on to add more features and implement each requirement.

The following are the screen shots of the different pages used in the portal.



Fig 1 Common login page

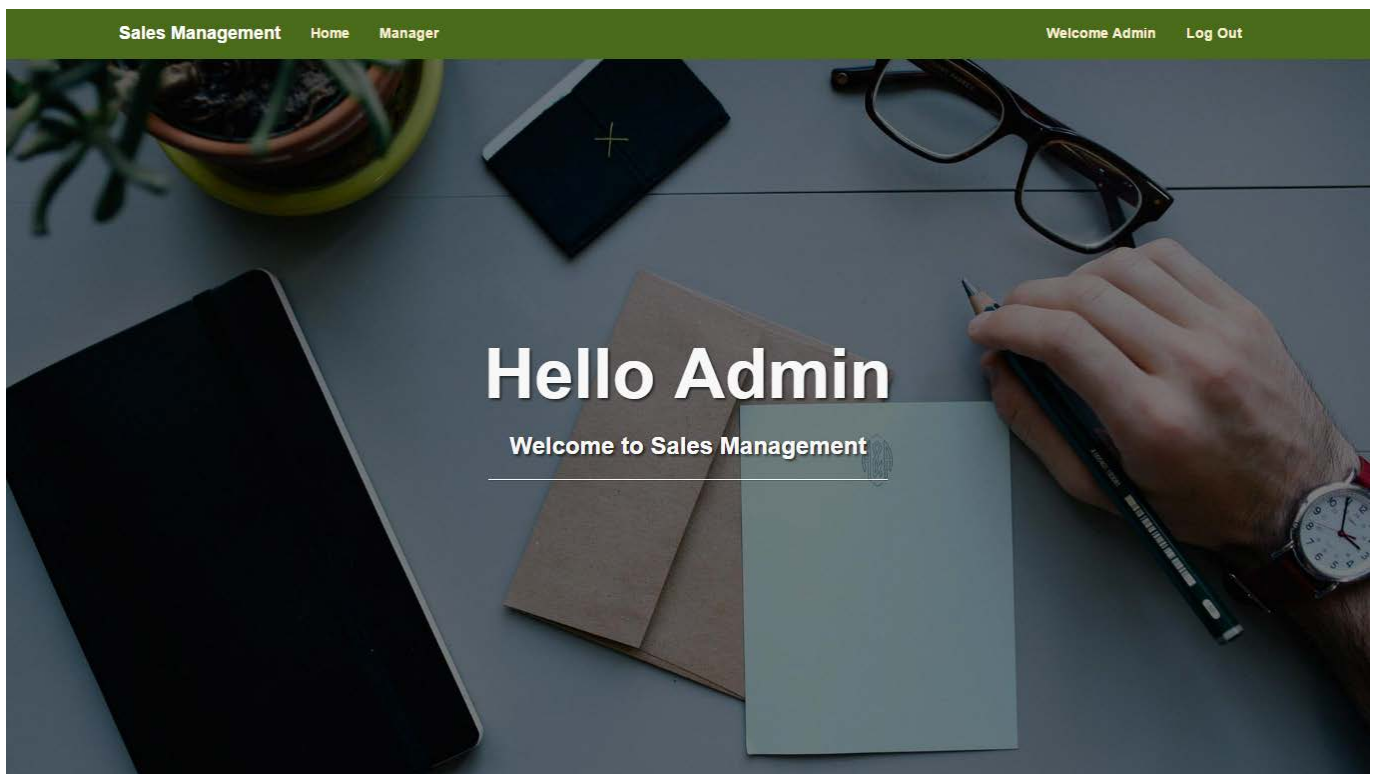


Fig 2 Admin Home page

Manager Management

User Name Password

User Name	Password	
Manager	Manager@01	Edit

Fig 3 Manager Management

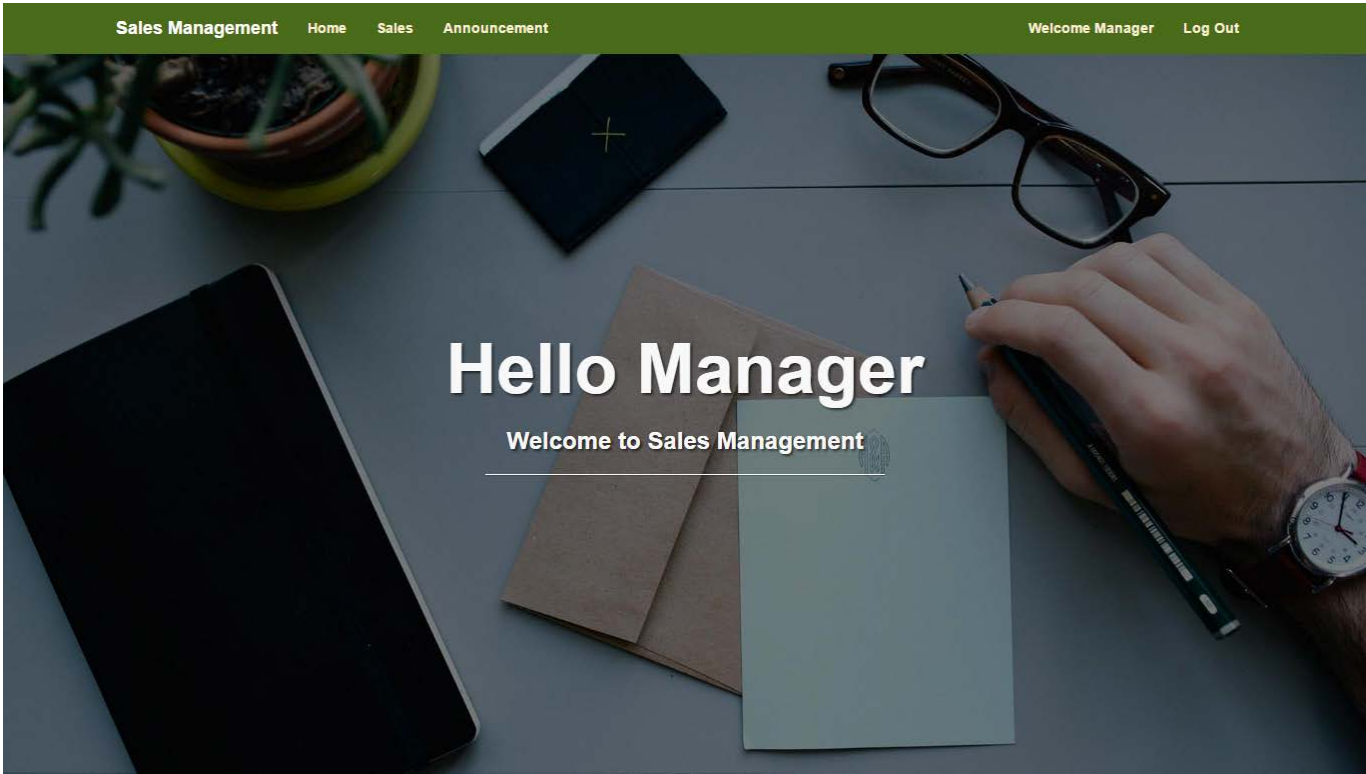


Fig 4 Manager Home page

Sales Management

User Name	Password
<input type="text" value="User Name"/>	<input type="text" value="Password"/>
<input type="button" value="Add User"/>	

User Name	Password	
Sales	sales@01	Edit
Pravin	pravin	Edit

Fig 5 Sales Management

Sales Announcement Management

Announcement	Date
<input type="text" value="Message"/>	<input type="text" value="eg: 2016/01/29"/>
<input type="button" value="Publish Announcement"/>	

	Message	Date
Edit Delete	This is test Announcement By Manager1	2016-11-22

Fig 6 Sales Announcement

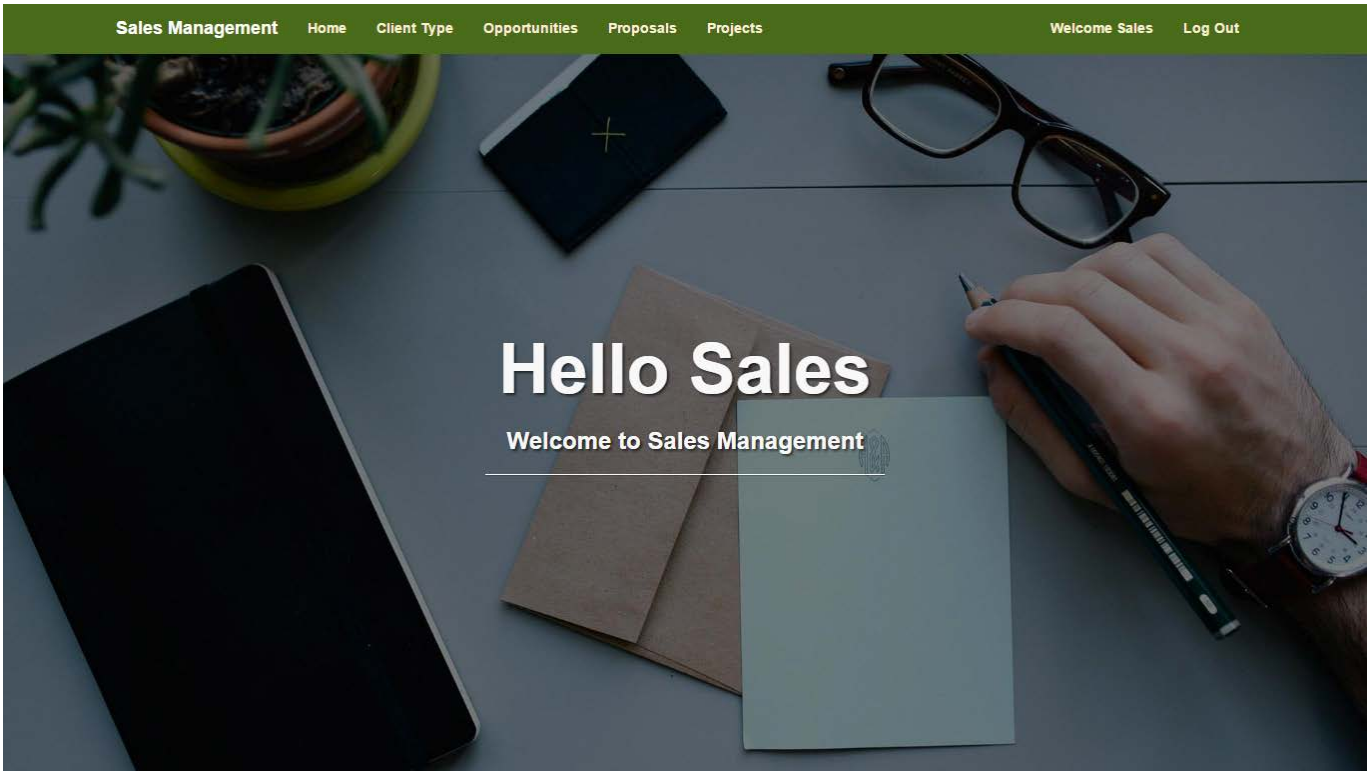


Fig 7 Sales Home Page

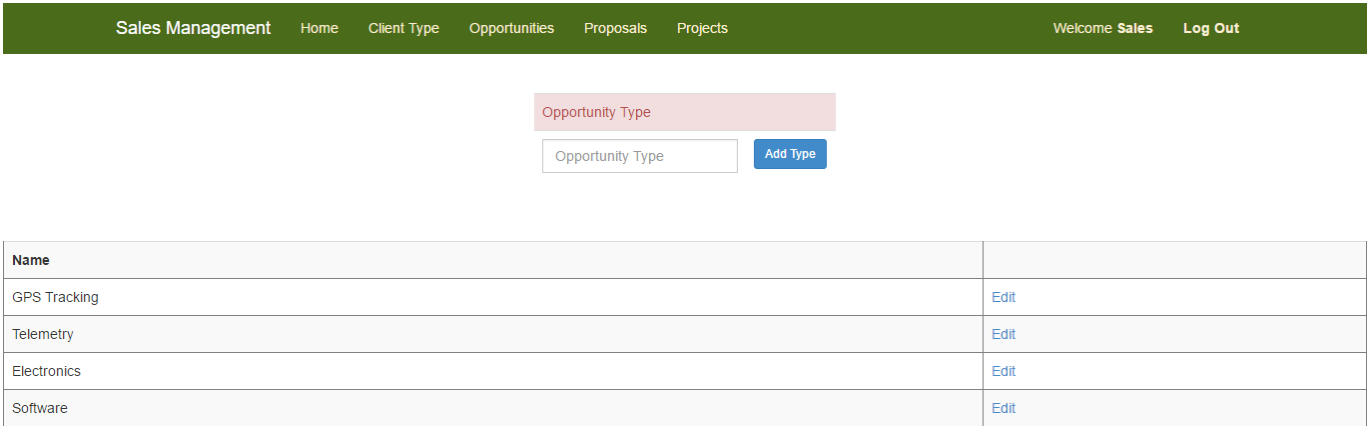


Fig 8 Opportunity Type Management

Opportunities Management

Name	Chance to Close	Estimated Budget	Type	Duration
<input type="text" value="Opportunity Name"/>	<input type="text" value="Chance to Close"/>	<input type="text" value="Estimated Budget"/>	<input type="text" value="GPS Tracking"/>	<input type="text" value="Duration in days"/>
Contact Name	Contact Number	Description	Notes	
<input type="text" value="Contact Name"/>	<input type="text" value="Contact Number"/>	<input type="text" value="Description"/>	<input type="text" value="Notes"/>	<input type="button" value="Add User"/>

Name	Date Time	Type	ChanceToClose	Budget	Duration	Contact Name	Contact Mobile	Description	Notes
SS Infoware	2016-11-22 10:36:42.000	Software	10%	20,99,000	20	Pravin	+60192938002	Project will confirm	My Notes

Fig 9 Opportunity Management

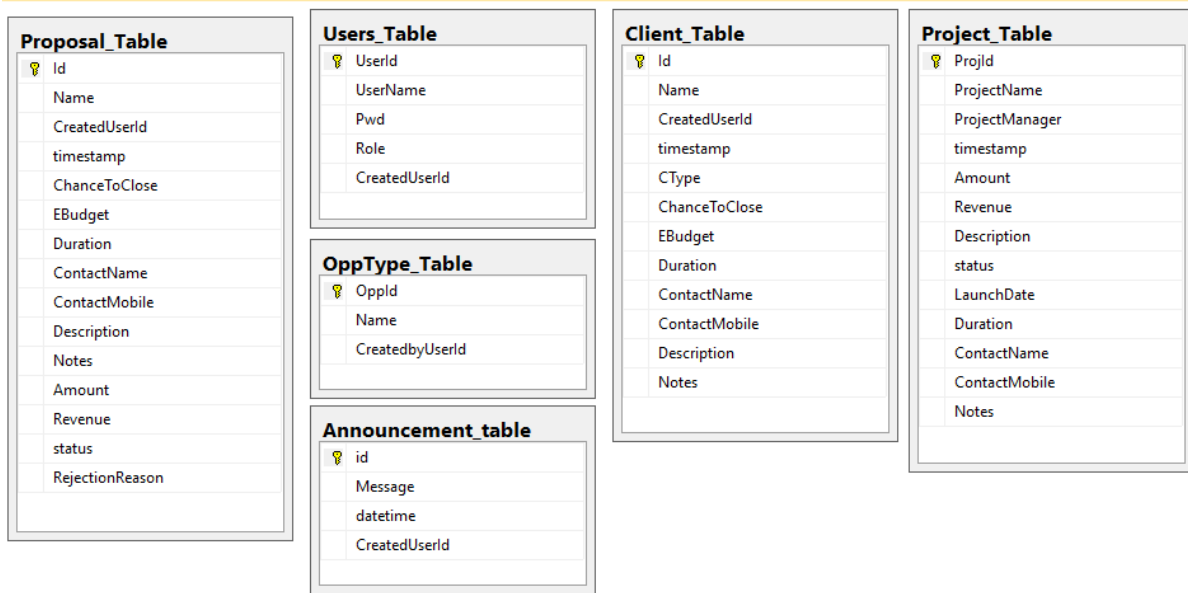
Proposals Management

Name	Chance to Close	Estimated Budget	Amount	Duration	Revenue
<input type="text" value="Proposals Name"/>	<input type="text" value="Chance to Close"/>	<input type="text" value="Estimated Budget"/>	<input type="text" value="eg: 2.45"/>	<input type="text" value="Duration in days"/>	<input type="text" value="Total Revenue"/>
Contact Name	Contact Number	Description	Notes	Rejection Reason	
<input type="text" value="Contact Name"/>	<input type="text" value="Contact Number"/>	<input type="text" value="Description"/>	<input type="text" value="Notes"/>	<input type="text" value="Rejection Reason"/>	<input type="checkbox"/> Accept <input type="button" value="Add User"/>

	Id	Name	CreatedUserid	timestamp	ChanceToClose	EBudget	Duration	ContactName	ContactMobile	Description	Notes	Amount	Revenue	status	RejectionReason
Edit	1	Pravin Kumar	7	21/11/2016 11:39:16 PM	10	1000	10	Pravin	09876	9876	9876543werfgh	2.62	10919	<input checked="" type="checkbox"/>	876tyrgfhjkhj

Fig 10 Proposal Management

Entity Diagram



6 *Internal/external Interface Impacts and Specification*

This portal was created as a part of the GSU master website which provides a communication between the admin, managers and the sales team members. The front end was developed using ASP.NET and the database is maintained by Microsoft SQL server Management Studio. The design is based responsive even to a mobile device and bootstrap has been incorporated. All the login pages can be seen on the above screenshots and then the entity relationship can also be viewed above.

7 *Design Units Impacts*

We developed this portal on only one design unit and that is the management portal Replace this section with a list of the impacted design units (functional areas). For new products this would be a list of all new functional areas and would therefore describe the new system architecture. However it is done, the design should clearly reflect how the design units fit together to define the project. Each functional area (or design unit) should have its own subsection below. If there are no known impacts to a given functional area, then that should be explicitly stated. For your project, it could be only one design unit that will covers all requirements, or you could have multiple design units (e.g., one for web interface, one for your application, and one for maintenance process etc.).

7.1 *Impacts*

The main impact on this projects were the users such as the admin, managers and sales team members. The admin is the super user who can add new managers, the managers can post announcements and add new sales team member. The team member can view and edit proposals and opportunities.

7.2 *Requirements*

The requirements were all carefully selected according to SMART criteria and can be viewed in the above sections

8 *Acknowledgements*

We would like to take this opportunity to thank god, our parents and everybody who supported us to successfully complete this project. We would like to specially acknowledge and thank Prof. D Park for guiding us and assisting us through the course of the project development and was keen in helping us in short comings. We also would like to thank the College of Arts and Science and the Department of Computer Science for the continued support.

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