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Sales Management Portal

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ABSTRACT

In the organizations managing the sales and client's information plays a key role so for managing that information we are going to develop a Sales Management Portal. Sales Management portal is used to manage all the products and the services sales details and customer details in the organization. By using this portal, the sales information in the organization can be managed easily and in a secured way. This web portal is very scalable which can be used for the small and also for the large organizations.

With this portal manager can see the employee's progress and can also share the important messages with the employees by using announcements. This portal is also used by the employees to save and manage all the clients and prospects details. Employees can also manage the client's general information, contact, opportunities, proposals and projects details.

Modules:

When coming to the modules of this portal, it contains 3 main modules like Administrator, Manager and Employee.

Administrator:

 In this module the administrator can add and authorize the manager for accessing the appropriate operations and he can also view the current projects, proposals, prospects and clients details. Administrator can also post any important information like the meeting timings.

Manager:

In this module the manager can add and authorize the employees for doing necessary actions to store the clients and prospects general information, opportunities, proposals and projects details. By using this module, the manager can also track the employee's progress and can also send the messages to the employees.

In this module the manager can also view and update prospects, opportunities and proposals details and the manager can also manage the project details.

Employee:

In this module the employees can add and save the new clients and prospects details with their general information, contact information and their proposals, opportunities and projects information. The sales management employees can also update the clients and prospects information and they can also search the client or a prospect through their names or by using the client or prospect filters to search the appropriate details.

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1. Project Description:

This is a conceptual design for a company's sales pipeline database portal, at which sales staff enter clients' information into pipeline by keeping logs of contacts and activities, opportunities and proposals, and eventually projects. The portal enables management to oversee works and track progresses, and in the meantime to interact with and provide guidance to sales staff timely. This portal should have a responsive design so it will adjust to diverse resolutions, making it easy for users to navigate the portal on their own devices. In this design document, a few simplified illustrations help students visualize and easily grasp the project concept. Students should conduct application requirement gathering and definition of database, and they should work out a detailed design specification on their own. Students also are encouraged to add new functionalities or innovative features to their applications.

1.1 Competitive Information:

In present market we are facing main problem for completing projects in this project we gather all clients and projects in single unit to make awareness for completing projects.

1.2 Relationship to Other Applications:

We can integrate this sales management portal application to any other company. We can use this in anywhere with simple modifications

1.3 Definitions and Acronyms:

Term	Definition
HTML	HyperTextMarkup Language
ASP. NET	Active Server Pages
CLR	Common Language Runtime
DBMS	Data Base Management System

1.4 Future Enhancement:

We are looking forward to develop some extra features in Sales Management Portal, which are group online chatting who are members in Sales Management Portal. We provide Project maintains support CR Ticket system.

2. Technical Description:

This is a Web Based system, the basic idea behind designing this application is to store the clients, prospects, projects, proposals and opportunities details at one place. This system can store, access and maintain data from database efficiently and can be used for further analysis. This project is a user interactive web application. The system will help the user to create users and clients. We use bootstrap for this application to access from mobile with responsive design. This application implemented with ASP.Net, java script, SQL server, HTML and CSS.

ASP.NET:

It is an integrated development environment (IDE) from Microsoft. It is used to develop computer programs for Microsoft Windows, as well as web sites, web applications and web services. Visual Studio uses Microsoft software development platforms such as Windows API, Windows Forms, Windows Presentation Foundation, Store and Microsoft Silverlight. It can produce both native code and managed code.

Visual Studio includes a code editor supporting IntelliSense as well as code refactoring. The integrated debugger works both as a source-level debugger and a machine-level debugger. Other built-in tools include a forms designer for building GUI applications, web designer, class designer, and database schema designer. It accepts plug-ins that enhance the functionality at almost every level—including adding support for source-control systems and adding new toolsets like editors and visual designers for domain-specific languages or toolsets for other aspects of the software. Visual Studio supports different programming languages and allows the code editor and debugger to support to varying degrees nearly any programming language, provided a language-specific service exists.

DATA BASE:

Microsoft SQL Server is a relational database management system developed by Microsoft. As a database, it is a software product whose primary function is to store and retrieve data as requested by other software applications, be it those on the same computer or those running on another computer across a network including the Internet. There are at least a dozen different editions of Microsoft SQL Server aimed at different audiences and for workloads ranging from small single-machine applications to large Internet-facing applications with many concurrent users.

2.1 Application Information flows:
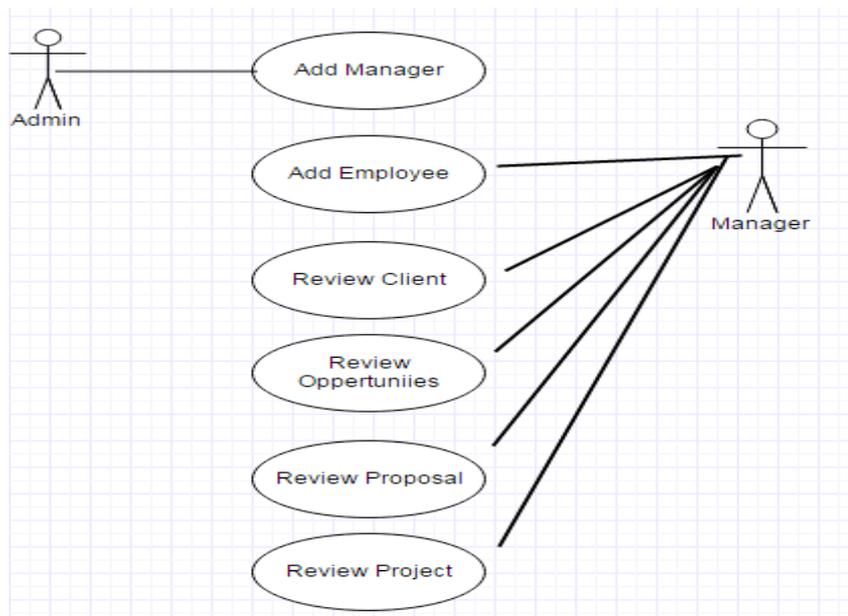
Description: the above figure of use case diagram shows the modules and users interacting with the defined modules.

2.2 **Interactions with other Projects:** To develop for this we are based on the sales management portals.

2.3 **Capabilities:**

> ➢ Admin can add Manager and Announcements.
> ➢ Manager can add Employee, projects, prospects and opportunities.
> ➢ Employee can add projects, prospects and opportunities.
> ➢ Manager sends information to Employee through portals.

3.Feasibility Report

Preliminary investigation examine project feasibility, the likelihood the system will be useful to the organization. The main objective of the feasibility study is to test the Technical, Operational and Economical feasibility for adding new modules and debugging old running system. All system is feasible if they are unlimited resources and infinite time. There are aspects in the feasibility study portion of the preliminary investigation:

✓ Technical Feasibility
✓ Operation Feasibility
✓ Economical Feasibility

3.1.Technical Feasibility

The technical issue usually raised during the feasibility stage of the investigation includes the following:

✓ Does the necessary technology exist to do what is suggested?
✓ Do the proposed equipment's have the technical capacity to hold the data required to use the new system?
✓ Will the proposed system provide adequate response to inquiries, regardless of the number or location of users?

✓ Can the system be upgraded if developed?

✓ Are there technical guarantees of accuracy, reliability, ease of access and data security?

Earlier no system existed to cater to the needs of 'Secure Infrastructure Implementation System'. The current system developed is technically feasible. It is a web based user interface for audit workflow at NIC-CSD. Thus it provides an easy access to the users. The database's purpose is to create, establish and maintain a workflow among various entities in order to facilitate all concerned users in their various capacities or roles. Permission to the users would be granted based on the roles specified.

3.2. Operational Feasibility

Proposed projects are beneficial only if they can be turned out into information system. That will meet the organization's operating requirements. Operational feasibility aspects of the project are to be taken as an important part of the project implementation. Some of the important issues raised are to test the operational feasibility of a project includes the following: -

✓ Is there sufficient support for the management from the users?

✓ Will the system be used and work properly if it is being developed and implemented?

✓ Will there be any resistance from the user that will undermine the possible application benefits?

This system is targeted to be in accordance with the above-mentioned issues. Beforehand, the management issues and user requirements have been taken into consideration. So there is no question of resistance from the users that can undermine the possible application benefits.

3.3. Economic Feasibility

A system can be developed technically and that will be used if installed must still be a good investment for the organization. In the economical feasibility, the development cost in

creating the system is evaluated against the ultimate benefit derived from the new systems. Financial benefits must equal or exceed the costs.

4. Project Requirements:

For developing Sales ManagementPortal, we are used some mandatory software and hardware specifications. If anybody want to use this project in their own device, they should follow the minimum below requirements which are.

4.1 Software Requirements:

- ➢ Front End   : Visual Studio .NET 2013 Professional.
- ➢ Back End   : SQL Server 2008 R2 Developer Edition.
- ➢ Operating Systems   : Windows 8.1
- ➢ Frame Work   : .NET 4.5

4.2 Hardware Requirements:

- ➢ Processor   : Intel Core i3
- ➢ RAM   : 4GB
- ➢ Hard Disk   : 500GB

4.3 Security and Fraud Prevention:

Security is the prevention of unidentified access to the data base. All the organizers whether a Member or an Administrator has to authenticate themselves by providing their USER ID and their personal Secure Password before logging onto their website. The total database is maintained by an Administrator. The administrator has all rights to modify the data in the database.

5. Project Internal/External Interfaces Impacts and Specifications:
5.1 Data Base Diagram:

NewsDetails
- NewsID
- News
- CreatedDate
- CreatedBy

MessageDetails
- MessageID
- ToID
- FromID
- Message
- CreatedDate

SMP_OpportunityDetails
- OpportunityID
- ClientID
- OpportunityName
- AddedBy
- ChanceToClose
- EstimatedBudget
- Duration
- Type
- ContactName
- ContactNo
- Description
- Notes
- IsActive
- CreatedBy
- CreatedDate
- UpdatedBy
- UpdatedDate

SM_RegistrationDetails
- RegID
- Name
- Gender
- MobileNo
- EMail
- TypeID
- Password
- HRegID
- IsActive
- CreatedDate
- CreatedBy

Master_City
- CityID
- CityName
- StateID
- IsActive

FK_Master_City_Master_State

Master_State
- teID
- StateName
- CountryID
- IsActive

FK_SM_ClientDetails_Master_City

Master_Type
- TypeID
- TypeName
- HTypeID
- IsActive

FK_SM_RegistrationDetails_Master_Type

FK_SMP_OpportunityDetails_SM_ClientDetails

SM_ClientDetails
- ClientID
- CompanyName
- MobileNo
- Email
- Fax
- Address
- CityID
- StateID
- ZipCode
- CountryID
- Division
- CTypeID
- IndustryID
- Website
- Source
- CompanyDescription
- RegID
- IsActive
- CreatedBy
- CreatedDate

Master_Industry
- IndustryID
- IndustryName
- IsActive

FK_SM_ClientDetails_Master_Industry

Master_Country
- CountryID
- IsActive

FK_SM_ClientDetails_Master_State

FK_Master_State_Master_Country

FK_SM_ClientDetails_Master_Country

FK_SMP_ProjectDetails_SM_ClientDetails

SMP_ProjectDetails
- ProjectID
- ClientID
- ProjectName
- ProjectManager
- Amount
- TotalRevenue
- Duration
- Status
- LanchDate
- ContactName
- ContactNo
- Description
- Notes
- IsActive
- CreatedBy
- CreatedDate
- UpdatedBy
- UpdatedDate

FK_SM_ClientDetails_Master_Company

FK_SMP_ProposalDetails_SM_ClientDetails

Master_CompanyType
- CTypeID
- CTypeName
- IsActive

SMP_ProposalDetails
- ProposalID
- ClientID
- ProposalName
- AccountManager
- ChanceToClose
- EstimatedBudget
- Duration
- Amount
- TotalRevenue
- Status
- RejectionReason
- ContactName
- ContactNo
- Description
- Notes
- IsActive
- CreatedBy
- CreatedDate
- UpdatedBy
- UpdatedDate

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