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Sales Management Portal

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ABSTRACT

The Sales Management Portal is a conceptual design for a company’s sales pipeline database portal, through which sales staff enters client’s 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 the staff 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. GSU Corporation is a world-renown provider of communication solutions. It offers a series of communication hardware, software and integration services. GSU’s sales department maintains its sales pipeline database through Sales Management Portal.

Problem: Plenty of Sales Users running Clients don't accept the importance of having a proper Sales Management Portal. I know multiple clients in that have multiple contacts or proposal or projects or notes or opportunities with thousands of companies attending that have gone ahead without any Sales Management Portal. Spending too much time on administration and sales don’t move fast enough from one stage to another and don’t know what your team is doing and don’t know proposals or projects or opportunities status. These are Sales pipeline that should know better. Then there are Sales users we can't really expect to know any better.

The Sales Management Portal can perform several important functions, including:

- Helps secure permission for the Clients to proceed.
- Treat every Client or Sales user in the same manner.
- Provides a site map for the clients and all clients pipeline information to Sales user.
- Ensures that we consider all relevant angles during planning.
- Ensures that we don't overlook anything.
- Acts as a key decision-support tool

A sales pipeline is the amount of business (in dollar value) that you will attempt to close in a given month, quarter or year. At its core, a sales pipeline is a snapshot of your
company’s sales process. Managing your sales pipeline means you are putting a process in place to build and track your pipeline. Once you manage it well, you will feel more in control of your sales figures.

In order to design and implement the project we need to build a software application with plenty of Sales users running to maintain clients. In addition to its broad product offering, Sales Management Portal is designed to offer time-saving.
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FEATURE DESCRIPTION

This is a conceptual design for a company’s sales pipeline database portal, through which sales staff enters client’s 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.

GSU Corporation is a world-renown provider of communication solutions. It offers a series of communication hardware, software and integration services. GSU’s sales department maintains its sales pipeline database through Sales Management Portal.

Current Implementation Modules:

- Sign-Up.
- Login.
- Manage Sales Users.
- Manage Clients Information.
- Manage Client Contacts
- Manage Client Notes
- Manage Client Opportunities
- Manage Client Proposals
- Manage Client Projects
- Search
- Proposal Report

Sign-Up

- New Sales Users / Managers can easily be added to Sales Management Portal.
Login
- Existing Sales Users/Managers with login credentials can easily enter into Sales Management portal to manage their tasks like manage client’s information and search particular client easily with search criteria.

Manage Sales Users
- Add / Update / Delete Sales Users

Manage Clients Information
- Add / Update / Delete Clients Information

Manage Clients Contacts
- Add / Update / Delete Clients Contacts

Manage Clients Notes
- Add / Update / Delete Clients Notes

Manage Clients Opportunities
- Add / Update / Delete Clients Opportunities

Manage Clients Proposals
- Add / Update / Delete Clients Proposals

Manage Clients Projects
- Add / Update / Delete Clients Projects

Search
- Allows Sales Users to find clients by names, either on complete or partial match.

Proposal Report
- Allows Managers who will be able to run various reports such as lists of Proposals.

View Clients in Sales User portal screen based on User client’s information
- View all Clients in Sales User Portal home screen based on User client’s information.

Objectives:
- Improve the speed of managing client’s information by Sales users.
• Improve the accuracy of the list of client’s information by showing easily to Sales users.
• Improve the accuracy of the managing client’s information.
• Reduce the time and work to manage client’s information, based on particular Sales user.
• Reduce cost and helps in faster performance.

1.1 Competitive Information.

Competitive Information means finding information about your competitors. It helps us to find out who your competitors are according to their age, qualifications, knowledge level, experience in Sales Management portal by maintaining sales pipeline.

You can also be able to find out how they promote and execute the client’s information. From this, we come across various questions like What do they do with the client’s information? Why Sales Users come to client’s information? For this you should attend each and every client information organized by your competitors and then create a project report or proposal report.

The reports will contain things like

- Project names or Proposal names
- Project Manager names or Proposal contact manager names
- Project created dates and launch dates or Proposal created date
- Projects estimated budget or annual revenue and project duration along with the project status
- Contact details of clients (for whom the client is organized) or project contact information
- Proposal estimated budget and status of proposals

Find out as much information as possible about clients organized by your competitors.

1.2 Relationship to Other Applications/Projects

Sales Management portal do not have any relationship with other applications by using 3rd party applications or Projects.
1.3 Assumptions and Dependencies

Efficient planning for project success significantly depends on the right statement of the constraints and assumptions. Why are constraints and assumptions in project management so important? The answer is that because setting proper project constraints and assumptions paves the way for adequate risk analysis, efficient project planning and timely project delivery.

New functionalities like more efficient way to search clients in Sales Management portal, managing multiple sales users and multiple client’s information at a time using sales management database. The Manager should also be able to run various reports such as list of proposals, clients or projects.

This project will not use any other applications like 3rd party applications or external applications.

1.4 Future Enhancements

Future Implementation Modules:

- Various Reports such as list of Client Projects or Proposals or Contacts or Opportunities based on particular dates between start date and end date.
- Improves GUI with new technologies.
- Reports for Proposals or Projects using Excel files or XML files.

1.5 Definitions and Acronyms

Software Requirements Specification:

It is a description of a particular software product, program or set of programs that performs a set of function in target environment.

Sales Management Portal:

GSU Sales Management Portal managing sales users and managing client’s information of sales users.

Client:

It can be described as company contacts information of different title roles and it contains proposals, projects and opportunities.

Proposal:

Proposal is specifically aimed at a well-defined and limited activity.
Project:

The defined scope of the project usually includes the contractual agreements between the client and the service provider.

Contact:

Contact is a person or a department serving as the coordinator or focal point of information concerning an activity or a program. Contact is used in many cases where information is time-sensitive and accuracy is important.

2 TECHNICAL DESCRIPTION

2.1 Application Architecture
This approach, known as the Model View Controller (MVC) or Model 2 architecture. It will let you know about each technology and on what it excels at. The original request is handled by a Servlet.

**MVC:**

**Model-View-Controller (MVC)** is an architectural pattern that separates an application into three main logical components: the **model**, the **view**, and the **controller**. Each of these components are built to handle specific development aspects of an application. MVC is one of the most frequently used industry-standard web development framework to create scalable and extensible projects.

**MVC Components:**

**Model**: The Model component corresponds to all the data related to the logic that the user works with. This can represent either the data that is being transferred between the View and Controller components or any other business logic related data. For example, a Customer object
will retrieve the customer information from the database, manipulate it and update the data back to the database or use it to render the data.

**View:** The View component is used for all the User Interface logic of the application. For example, the Customer view would include all the UI components such as text boxes, dropdowns, etc. that the final user interacts with.

**Controller:** Controllers act as an interface between Model and View components to process all the business logic and incoming requests, manipulating the data using Model component and interact with the views to render the final output. For example, the Customer controller would handle all the interactions and inputs from the Customer View and update the database using the Customer Model. The same controller would be used to view the Customer data.

### 2.2 Application Information Flows

- **Start up**
  Sales Management portal Sign in screen or Sign up screen in the home page at the right corner where the Sales users / Managers can enter or create an account to the Sales Management portal. Sales Users home screen shows all the clients information, based on Sales users.

- **Maintenance Users**
  1. Manager can view/add/update/delete all Sales users details.
  2. Manager can add new Sales user.
  3. Manager can update Sales user.
  4. Manager can delete Sales user.

- **Maintenance Clients Information**
  1. Sales users can view/add/update/delete all their Clients Information details.
  2. Sales users can add new Client information.
  3. Sales users can update Client information.
  4. Sales users can delete Client information.

- **Maintenance Clients Contacts Information**
  1. Sales users can view/add/update/delete all their Clients Contacts Information details.
2. Sales users can add new Client Contacts information.
3. Sales users can update Client Contacts information.
4. Sales users can delete Client Contact information.

• Maintenance Clients Notes Information
1. Sales users can view/add/update/delete all their Clients Notes details.
2. Sales users can add new Client Notes.
3. Sales users can update Client Notes.
4. Sales users can delete Client Notes.

• Maintenance Clients Opportunities Information
1. Sales users can view/add/update/delete all their Clients Opportunities details.
2. Sales users can add new Client Opportunities.
3. Sales users can update Client Opportunities.
4. Sales users can delete Client Opportunities.

• Maintenance Clients Proposals Information
1. Sales users can view/add/update/delete all their Clients Proposals details.
2. Sales users can add new Client Proposal.
3. Sales users can update Client Proposal.
4. Sales users can delete Client Proposal.

• Maintenance Clients Projects Information
1. Sales users can view/add/update/delete all their Clients Project details.
2. Sales users can add new Client Project.
3. Sales users can update Client Project.
4. Sales users can delete Client Project.

• Search Client Information
  Sales Users can easily search client’s information by using client name text partially or directly.

2.3 Interactions with Other Applications
  By having Interaction with MySQL, we can easily find out client information using MySQL Database or Request from Browser in Java built application.
2.4 Capabilities

A manageable feature, faculty, function, process, service or discipline that represents an ability to perform something which yields an expected set of results and is capable of further advancement or development, specifically pertaining to the area of Sales Management portal.

Sales Management portal uses Database for storing Users information and Clients information by managing easily about Sales users / Managers. In this we used MySQL database which is free open source software that will easily create queries and communicate with Java JDBC for faster execution of the queries.

Sales Management users can easily add or update or delete client’s information using MySQL data base with Java JDBC. It is the easiest way to communicate the both software’s and manage all the users or client’s data.

2.5 Risk Assessment and Management

In some sections, we found out risks in this project in MySQL database. Those are sometimes the database did not work properly because of security errors or port errors MySQL database. The port numbers should be maintained by firewall protection, also do not install any related software on this port numbers and do not change passwords. This risk is not solved in my project but maintains the data everything in database.

Three common sections in a project plan are: Assumptions, Risks, and Dependencies. I hate assumptions; all assumptions are risks, you're just not planning on dealing with them. If it was up to me, the word "assume" would be banned from project plans. Dependencies are similar. If a dependency has already been satisfied, then it simply "is". If a dependency has not already been satisfied, then there's a risk that it won't be satisfied. You don't manage dependencies; you manage the risk that dependencies will not be met in a timely fashion.

This process of examination becomes even more important in the planning process for new clients. A failure to assess the risks involved in portal can be disastrous as a result of:

- Loss of reputation
- Financial loss
- Damage to facilities
- Over-resourcing of one objective leading to under-resourcing of other objectives
The first step in planning any new client is to conduct a feasibility study. The purpose of such a study is to identify and assess the benefits and risks of the clients, and to identify what problems need to be solved in order to successfully stage the client.

The feasibility analysis should aim to identify any risks such as:

- The sufficiency of lead time to organize the client
- The name of client and whether it clashes with any other company name that may significantly affect the success of the client
- The budget and whether the client can run without incurring a loss.

3 PROJECT REQUIREMENTS

3.1 Identification of Requirements

< GSU-GS_SP2016-1 User-Capability-000100>

The project must allow new users to be added, updated, or deleted by the application or manager.

Implementation: Mandatory

Sales Management portal allows users to maintain their own clients or Managers to maintain sales user’s data and send messages to users and taking reports such as Proposals or Projects.

< GSU-GS_SP2016-1 Client-Capability-000200>

The project must allow new clients information to be added, updated, or deleted by the application Sales User.

Implementation: Mandatory

Sales Management portal Sales Users can manage their own clients can be added or update or delete and can manage all client’s information.
The project must allow new clients contact information to be added, updated, or deleted by the application Sales User.

Implementation: Mandatory

Sales Management portal Sales Users can manage their own clients contacts can be added or update or delete and can manage all clients contacts information.

The project must allow new clients notes information to be added, updated, or deleted by the application Sales User.

Implementation: Mandatory

Sales Management portal Sales Users can manage their own client’s notes can be added or update or delete and can manage all clients notes information.

The project must allow new clients opportunity information to be added, updated, or deleted by the application Sales User.

Implementation: Mandatory

Sales Management portal Sales Users can manage their own client’s opportunities can be added or update or delete and can manage all client’s opportunities information.

The project must allow new clients proposal information to be added, updated, or deleted by the application Sales User.

Implementation: Mandatory

Sales Management portal Sales Users can manage their own client’s proposals can be added or update or delete and can manage all client’s proposals information.
The project must allow new clients projects information to be added, updated, or deleted by the application Sales User.

Implementation: Mandatory

Sales Management portal Sales Users can manage their own client’s projects can be added or update or delete and can manage all client’s projects information.

The project must allow Sales Users to search clients using company names.

Implementation: Mandatory

The project must allow Managers users to reports as proposals.

Implementation: Mandatory

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

Sales Management portal does not provide any backup data or fault tolerant issues and routine maintenances. In future, we need to develop data backup using CD/DVD or Excel or Xml files to store all the Sales Management portal users and client’s information data.

3.3 Security and Fraud Prevention

Security Management includes formulating, preparing and implementing security plans and strategies for portal i.e. how to protect web application from hackers or securities on systems like:

- By making sure that the developing database queries are not affected by hackers.
- By making sure that this software application system has antivirus and firewalls on and maintain securities.

3.4 Release and Transition Plan

Sales Management portal can easily integrate on any System with any type of software like window or Linux or OS Mac because we developed this software on Java. So Java can run
anywhere on this world once we write the code. Users must have internet to easily access from anywhere in this world.

Feasibility will be examined to integrate this project with any other platforms.

### 4 PROJECT DESIGN DESCRIPTION

**User case diagram for Sign In or Sign Out Users**

<table>
<thead>
<tr>
<th>Name</th>
<th>Sign in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Grant a user access as an authorized user either Sales Users / Managers</td>
</tr>
<tr>
<td>Actor(s)</td>
<td>Sales Users / Managers</td>
</tr>
</tbody>
</table>
| Flow of Events| 1. Sales Users / Managers wants to use the Sales Management portal.  
2. Sales Users / Managers selects to Log in  
3 Sales Users / Managers enters credentials  
4. System tests the credentials and grant access or shows error messages. |
| Special Requirements | Require credentials (username and password) |
| Pre-Conditions | Sales Users / Managers has previously be set up in the system |
| Post-Conditions| Sales Users / Managers are authorized to the Sales Management portal if requirements and exceptions are met. |
### Exceptions

<table>
<thead>
<tr>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credentials do not match shows error/exception</td>
</tr>
</tbody>
</table>

### Name

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign out</td>
</tr>
</tbody>
</table>

### Description

Remove a Sales User / Manager access to the System

### Actor(s)

Sales Users / Managers

### Flow of Events

1. Sales Users / Managers want to end using the system.
2. Sales Users / Managers selects to log out.
3. System logs out the Sales Users / Managers.

### Special Requirements

### Pre-Conditions

Sales Users / Managers is currently authorized to the system

### Post-Conditions

No Sales Users / Managers are currently authorized if requirements and exceptions are met.

### Exceptions

There must be a Sales Users / Managers authorized before a use can be logged out.

### Manage Users user case diagram

![Manage Users Diagram](image)

### Name

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add User (Sales User)</td>
</tr>
</tbody>
</table>

### Description

Add the information for a new Sales User to the Sales Management portal. This happens when new Sales User arrives
in the system. For the new Sales User, Email and Password only.

<table>
<thead>
<tr>
<th>Actor(s)</th>
<th>Manager / Sales Management Signup</th>
</tr>
</thead>
</table>

**Flow of Events**

2. Manager / Sales User selects to add a new Customer or Signup option for Sales User
3. Manager / Sales User enters information about the User information
4. Manager/ Sales User selects to save the Sales User

**Special Requirements**

Require Sales User username and password.

**Pre-Conditions**

Manager/ Sales User has been authorized to the system

**Post-Conditions**

Sales User is added to system if requirements are met and there are not special exceptions.

**Exceptions**

Do not add if Sales User exists in system

<table>
<thead>
<tr>
<th>Name</th>
<th>Update User (Sales User)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Update the information for an existing Sales User in the system. This happens when a correction is required.</td>
</tr>
<tr>
<td><strong>Actor(s)</strong></td>
<td>Manager</td>
</tr>
</tbody>
</table>

**Flow of Events**

1. A change in Sales User information is detected.
2. Manager selects to update a Sales User.
3. Manager selects Sales User to update.
3. Manager enters information about the Sales User.
4. Manager selects to update the Sales User.

**Special Requirements**

Require username

**Pre-Conditions**

Manager has been authorized to the system

**Post-Conditions**

Sales User is updated in system if requirements and exceptions are met.
<table>
<thead>
<tr>
<th>Exceptions</th>
<th>Validation must follow for first name and last name and username and email when update.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Delete Sales User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Delete the information for an existing Sales User in the system.</td>
</tr>
<tr>
<td>Actor(s)</td>
<td>Admin</td>
</tr>
</tbody>
</table>
| Flow of Events | 1. Sales User is identified that needs deletion.  
2. Manager selects to delete a Customer.  
3. Manager selects Customer to delete.  
4. Manager deletes Customer. |

<table>
<thead>
<tr>
<th>Special Requirements</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre- Conditions</td>
<td>Manager has been authorized to the system</td>
</tr>
<tr>
<td>Post- Conditions</td>
<td>Sales User is deleted from system if requirements and exceptions are met.</td>
</tr>
<tr>
<td>Exceptions</td>
<td>Do not delete when exception occur.</td>
</tr>
</tbody>
</table>

Manage Clients use case diagram

![Manage Clients use case diagram](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Add Client Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Add the information for a new Client to the Sales Management portal. This happens when new Client arrives in the system. For</td>
</tr>
</tbody>
</table>
### New Client

<table>
<thead>
<tr>
<th>Actor(s)</th>
<th>Sales User</th>
</tr>
</thead>
</table>
| **Flow of Events** | 1. A new Client arrives in the Sales Management portal.  
2. Sales User selects to add a new Client  
3. Sales User enters information about the Client  
4. Sales User selects to save the Client |
| **Special Requirements** | Require Client company name and descriptions. |
| **Pre- Conditions** | Sales User has to be authorized to the system |
| **Post- Conditions** | Client is added to system if requirements are met and there are not special exceptions. |
| **Exceptions** | Do not add if Client exists in system |

### Update Client

<table>
<thead>
<tr>
<th>Name</th>
<th>Update Client</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Update the information for an existing Client in the system. This happens when a correction is required.</td>
</tr>
<tr>
<td><strong>Actor(s)</strong></td>
<td>Sales User</td>
</tr>
</tbody>
</table>
| **Flow of Events** | 1. A change in Client information is detected.  
2. Sales User selects to update a Client.  
3. Sales User selects Client to update.  
3. Sales User enters information about the Client.  
4. Sales User selects to update the Client. |
<p>| <strong>Special Requirements</strong> | Require Company name and descriptions etc. |
| <strong>Pre- Conditions</strong> | Sales User has been authorized to the system |
| <strong>Post- Conditions</strong> | Client is updated in system if requirements and exceptions are met. |
| <strong>Exceptions</strong> | Validation must follow for all fields of Client when update Client information. |</p>
<table>
<thead>
<tr>
<th>Name</th>
<th>Delete Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Delete the information for an existing Client in the system.</td>
</tr>
<tr>
<td>Actor(s)</td>
<td>Sales User</td>
</tr>
</tbody>
</table>
| Flow of Events  | 1. Sales User is identified that needs deletion.  
|                 | 2. Sales User selects to delete a Client.     
|                 | 3. Sales User selects Client to delete.      
|                 | 4. Sales User deletes Client.               |
| Special         |                                          |
| Requirements    |                                          |
| Pre- Conditions | Sales User has been authorized to the system |
| Post- Conditions| Sales User is deleted from system if requirements and exceptions are met. |
| Exceptions      | Do not delete when exception occur.        |

Search Client user case diagram

![Search Client Diagram](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Search Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Sales User search the Clients or view Clients</td>
</tr>
<tr>
<td>Actor(s)</td>
<td>Sales User</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Flow of Events**| 1. A search or view Clients arrives in the Sales Management portal.  
2. Sales User select to search a Client or view Client in Sales User home page. |
| **Special Requirements** | See Client company name.                     |
| **Pre-Conditions** | Sales User and Clients has to be authorized to the system |
| **Post-Conditions** | Search Client or View Clients if requirements are met and there are not special exceptions. |
| **Exceptions**    | Cannot search for a client when an exception occurs |

**Manage Client Contact Use case diagram**

![Manage Client Contact Use case diagram](image-url)
Sequence Diagram of Sign-In

Class Definitions
Subject Class represents the list of Subjects and their attributes.

Attributes Summary

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Password</td>
</tr>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Created Date</td>
</tr>
<tr>
<td>Delete Status</td>
</tr>
</tbody>
</table>
Clients

Subject Class represents the list of Subjects and their attributes.

Attributes Summary

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company name</td>
</tr>
<tr>
<td>Telephone number</td>
</tr>
<tr>
<td>Fax number</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td>Zip code</td>
</tr>
<tr>
<td>Country</td>
</tr>
<tr>
<td>Division</td>
</tr>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Industry</td>
</tr>
<tr>
<td>Website</td>
</tr>
<tr>
<td>Source</td>
</tr>
<tr>
<td>Company Description</td>
</tr>
<tr>
<td>Created Date</td>
</tr>
<tr>
<td>Delete Status</td>
</tr>
</tbody>
</table>

Clients Contacts

Subject Class represents the list of Subjects and their attributes.

Attributes Summary

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
</tr>
</tbody>
</table>
### Clients Notes

Subject Class represents the list of Subjects and their attributes.

#### Attributes Summary

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes</td>
</tr>
<tr>
<td>Created Date</td>
</tr>
<tr>
<td>Delete Status</td>
</tr>
</tbody>
</table>

### Clients Opportunities

Subject Class represents the list of Subjects and their attributes.

#### Attributes Summary

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity name</td>
</tr>
<tr>
<td>Chance to close</td>
</tr>
<tr>
<td>Estimated Budget</td>
</tr>
</tbody>
</table>
### Name

- Opportunity Duration
- Opportunity Type
- Contact name
- Contact Telephone
- Opportunity Description
- Opportunity Notes
- Created Date
- Delete Status

### Clients Proposals

Subject Class represents the list of Subjects and their attributes.

### Attributes Summary

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal name</td>
</tr>
<tr>
<td>Account Manager</td>
</tr>
<tr>
<td>Chance to close</td>
</tr>
<tr>
<td>Estimated Budget</td>
</tr>
<tr>
<td>Proposal Duration</td>
</tr>
<tr>
<td>Proposal Amount</td>
</tr>
<tr>
<td>Total Revenue</td>
</tr>
<tr>
<td>Proposal Status</td>
</tr>
<tr>
<td>Rejection Reason</td>
</tr>
<tr>
<td>Contact name</td>
</tr>
<tr>
<td>Contact Telephone</td>
</tr>
<tr>
<td>Proposal Description</td>
</tr>
<tr>
<td>Proposal Notes</td>
</tr>
<tr>
<td>Created Date</td>
</tr>
</tbody>
</table>
### Clients Projects

Subject Class represents the list of Subjects and their attributes.

### Attributes Summary

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Status</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project name</td>
</tr>
<tr>
<td>Project Manager</td>
</tr>
<tr>
<td>Project Amount</td>
</tr>
<tr>
<td>Total Revenue</td>
</tr>
<tr>
<td>Project Duration</td>
</tr>
<tr>
<td>Project Status</td>
</tr>
<tr>
<td>Launch Date</td>
</tr>
<tr>
<td>Contact name</td>
</tr>
<tr>
<td>Contact Telephone</td>
</tr>
<tr>
<td>Project Description</td>
</tr>
<tr>
<td>Project Notes</td>
</tr>
<tr>
<td>Created Date</td>
</tr>
<tr>
<td>Delete Status</td>
</tr>
</tbody>
</table>

### 5 INTERNAL/EXTERNAL INTERFACE IMPACTS AND SPECIFICATIONS

The system allows the Sales Users to select the Managing client’s 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 DESIGN UNIT IMPACT

This module lists all the new functional areas which describes the new system architecture. However, this will be done, when the design should clearly reflect whether 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 cover all the requirements, or you could have multiple design units (e.g., one for web interface, one for your application, and one for maintenance process etc.).

6.1 FUNCTIONAL AREA A/DESIGN UNIT A

6.1.1 Functional Overview

1. Users (add, update, delete)
   1. User Id
   2. First Name
   3. Last Name
   4. Password
   5. Email
6. Type
7. Created Date
8. Delete Status

2. **Client (add, update, delete)**
   1. Sales_client_id
   2. Sales_user_id
   3. Company_name
   4. Telephone_number
   5. Fax_number
   6. Address_lines
   7. City
   8. State
   9. Zip_code
   10. Country
   11. Division
   12. Type
   13. Industry
   14. Web_site
   15. Source
   16. Company_description
   17. Created_date
   18. Delete_status

3. **Client Contact (add, update, delete)**
   1. client_contact_id
   2. sales_client_id
   3. first_name
   4. last_name
   5. title
   6. work_phone_number
   7. mobile_phone_number
   8. fax_number
9. e_news
10. email
11. created_date
12. delete_status

4. Client Note (add, update, delete)
   1. client_note_id
   2. sales_client_id
   3. client_notes
   4. created_date
   5. delete_status

5. Client Opportunities (add, update, delete)
   1. client_opportunities_id
   2. client_contact_id
   3. client_opportunities_name
   4. chances_to_close
   5. estimated_budget
   6. opportunity_duration
   7. opportunity_type
   8. contact_name
   9. contact_telephone
   10. opportunity_description
   11. opportunity_notes

6. Client Proposals (add, update, delete)
   1. client_proposals_id
   2. client_contact_id
   3. client_proposal_name
   4. proposal_account_manager
   5. created_date
   6. chances_to_close
   7. estimated_budget
   8. proposal_duration
9. private double proposal_amount
10. private double total_revenue
11. proposal_status
12. rejection_reason
13. contact_name
14. contact_telephone
15. proposal_description
16. proposal_notes

7. Client Projects (add, update, delete)
   1. client_project_id
   2. client_contact_id
   3. client_project_name
   4. client_project_manager
   5. created_date
   6. project_amount
   7. total_revenue
   8. project_duration
   9. project_status
   10. launch_date
   11. contact_name
   12. contact_telephone_number
   13. project_description
   14. project_notes
   15. delete_status

8. Message
   1. entries_id
   2. leave_comments
   3. send_messages_to_staff
   4. created_date
   5. delete_status

9. Control access to all management functions (maintenance)
1. Identify specific user either Sales User / Manager User.
2. Ensure the Sales User / Manager login is who they say they are (single password is sufficient)

10. Functional requirement languages Databases, Javascript, Java, Servlets, JSP, CSS, HTML.

6.1.2 Non-Functional Requirements

- **Usability**
  - The system must be easy to use so that Sales Users can quickly create clients or manage clients. There are often new clients, so it is important for the system to be quick to create a client and show them to the Sales User.
    - Sales User should be able to maintain clients.
    - Sales User should be able to effectively operate the functions.

- **Reliability**
  - The system must be highly reliable. If the system is not available, Sales User cannot easily make clients or Managers.

- **Performance**
  - All Clients or Sales users or any other information from this web application which is generated should be performed under 1 second.
  - All function look ups should be performed in less than 1 second.

- **Supportability**
  - The system will be able to automatically install updates and receive them from the software development team.
  - The system should provide a training mode that can be used by Users who are being trained. In training mode, the system does not log actual tasks.
  - The system should provide on screen help.
  - The system should come with training documentation.

- Internet connections are required
- Pentium iii/iv
• 20 GB Hard disk, 64-128 MB RAM
• Network interface card.

Target Environment
The system must normally function on a standalone Windows 10 based PC with 4G of memory and 200 GB hard drive.

6.1.3 Requirements

SOFTWARE REQUIREMENTS

<table>
<thead>
<tr>
<th>Languages:</th>
<th>Java, Servlets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web languages</td>
<td>Jsp, JavaScript, Ajax, Html, CSS, Bootstrap</td>
</tr>
<tr>
<td>Operating Systems:</td>
<td>Window7, Mac, Linux</td>
</tr>
<tr>
<td>Databases Server:</td>
<td>MySQL 5.0</td>
</tr>
<tr>
<td>Server</td>
<td>Apache Tomcat Server</td>
</tr>
<tr>
<td>Tools/IDE:</td>
<td>Eclipse SDK</td>
</tr>
</tbody>
</table>

HARDWARE REQUIREMENTS

Processor : Intel or AMD or Pentium or any processor with a Speed of 2.1 GHz
Hard Disk : 40 GB at least
Monitor : Standard Color Monitor
I/O devices : Standard Keyboard and Mouse
RAM : 256MB or more 1 GB (recommended).
6.2 FUNCTIONAL AREA B/DESIGN UNIT B

 Registration:
The Sales user has to register in order to login the Sales Management portal system. The user has to provide Username details to get registered. Once the details are submitted the system checks and registration page whether the user with valid details has an account or not by allowing the person to access over the system.

 Login:
The user has to login to have access over the system by providing his/her User ID and Password. Once the user has logged in, the user can view the clients or create a new client in the Sales user home page.

 Sales Management Portal:
The system will be network bases system. It is a web application portal

 Manager:
The Manager manages the Sales Users by sending messages to users or by taking Reports from them.

 Sales Users:
Sales users can create or update or delete the client’s information, client contacts, client notes, client opportunities, client proposals and client projects in the home page.
Tables:

create table salesusers(sales_user_id INT NOT NULL AUTO_INCREMENT,
first_name varchar(100) not null,
last_name varchar(100) not null,
user_name varchar(50) not null unique,
password varchar(15) not null,
email varchar(75) not null,
type varchar(100) not null,
created_date date not null,
delete_status varchar(1) not null,
PRIMARY KEY (sales_user_id));

create table salesclients(sales_client_id INT NOT NULL AUTO_INCREMENT,
sales_user_id int not null,
company_name varchar(150) not null,
telephone_number varchar(12) not null,
fax_number varchar(12) not null,
address_lines varchar(200) not null,
city varchar(75) not null,
state varchar(50) not null,
zip_code varchar(12) not null,
country varchar(15) not null,
division varchar(50) not null,
type varchar(100) not null,
industry varchar(75) not null,
web_site varchar(50) not null,
source varchar(50) not null,
company_description varchar(500) not null,
created_date date not null,
delete_status varchar(1) not null,
PRIMARY KEY (sales_client_id),
FOREIGN KEY (sales_user_id) REFERENCES salesusers (sales_user_id));

create table clientcontacts(client_contact_id INT NOT NULL AUTO_INCREMENT,
sales_client_id int not null,
first_name varchar(30) not null,
last_name varchar(30) not null,
title varchar(100) not null,
work_phone_number varchar(12) not null,
mobile_phone_number varchar(12) not null,
fax_number varchar(12) not null,
e_news varchar(100) not null,
email varchar(75) not null,
created_date date not null,
delete_status varchar(1) not null,
PRIMARY KEY (client_contact_id),
FOREIGN KEY (sales_client_id) REFERENCES salesclients (sales_client_id));

create table clientnotes(client_note_id INT NOT NULL AUTO_INCREMENT,
sales_client_id int not null,
client_notes varchar(200) not null,
created_date date not null,
delete_status varchar(1) not null,
PRIMARY KEY (client_note_id),
FOREIGN KEY (sales_client_id) REFERENCES salesclients (sales_client_id));

create table clientopportunities(client_opportunities_id INT NOT NULL AUTO_INCREMENT,
client_contact_id int not null,
client_opportunities_name varchar(300) not null,
chances_to_close int not null,
estimated_budget int not null,
opportunity_duration int not null,
opportunity_type varchar(75) not null,
contact_name varchar(50) not null,
contact_telephone varchar(12) not null,
opportunity_description varchar(500) not null,
opportunity_notes varchar(500) not null,
created_date date not null,
delete_status varchar(1) not null,
PRIMARY KEY (client_opportunities_id),
FOREIGN KEY (client_contact_id) REFERENCES salesclients (sales_client_id));

create table clientproposals(client_proposals_id INT NOT NULL AUTO_INCREMENT,
client_contact_id int not null,
client_proposal_name varchar(100) not null,
proposal_account_manager varchar(75) not null,
created_date date not null,
chances_to_close int not null,
estimated_budget int not null,
proposal_duration int not null,
proposal_amount numeric(18,2) not null,
total_revenue numeric(18,2) not null,
proposal_status varchar(25) not null,
rejection_reason varchar(50) not null,
contact_name varchar(100) not null,
contact_telephone varchar(10) not null,
proposal_description varchar(250) not null,
proposal_notes varchar(150) not null,
delete_status varchar(1) not null,
PRIMARY KEY (client_proposals_id),
FOREIGN KEY (client_contact_id) REFERENCES salesclients (sales_client_id));

create table clientprojects(client_project_id INT NOT NULL AUTO_INCREMENT,
client_contact_id int not null,
client_project_name varchar(100) not null,
client_project_manager varchar(100) not null,
created_date date not null,
project_amount numeric(18,2) not null,
total_revenue numeric(18,2) not null,
project_duration int not null,
project_status varchar(75) not null,
launch_date date not null,
contact_name varchar(150) not null,
contact_telephone_number varchar(12) not null,
project_description varchar(500) not null,
project_notes varchar(500) not null,
delete_status varchar(1) not null,
PRIMARY KEY (client_project_id),
FOREIGN KEY (client_contact_id) REFERENCES salesclients (sales_client_id));

create table entries(entries_id INT NOT NULL AUTO_INCREMENT,
leave_comments varchar(250) not null,
send_messages_to_staff varchar(1000) not null,
created_date date not null,
delete_status varchar(1) not null,
PRIMARY KEY (entries_id));

8 SCREENSHOTS

Home Screen
Login Screen

Registration Screen
9 OPEN ISSUES

Sales management is a glamorous and exciting profession which demands a lot of hard work and dynamism. As the name suggests, it means conceptualizing, planning, organizing and finally executing a client’s company organization. The portal could be of client company organization.
• Not maintaining accurate written records.

• Not monitoring progress closely

• Allowing insufficient planning time

• Failing to communicate and coordinate fully with committee members

• No contingency plans

• Program running over time

• Team members not having sufficient knowledge

• Confusion.

10 ACKNOWLEDGEMENT

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. I express my sincere gratitude to my Professor for assigning me a project on Sales Management Portal, which is an interesting and exhaustive subject.

She has been an inspiration and role model for this topic. Her guidance and active support made it possible to complete the assignment.

11 REFERENCES

