

SSAD 47



SALES ASSISTANT

- Mugdha Abhyankar
- Koushik Sai Achyuth Ayila
- Buggana Sathvik Sanjeev

VISION

To build

Dashboard API's

For the users of the

Sales Boosting app

“Boostr”

4 STAGES IN A PIPELINE (DEFAULT)

Lead

These are names on the list, people who responded or inbound advertising. They may also include referrals. Anything that could be a potential customer is a lead.

Prospect

If the lead wants to proceed ahead, it becomes a prospect. Further negotiation happens here.

Opportunity

When a prospect decides that the product is viable and that they should go ahead, it becomes an opportunity. The prospect is clearly interested.

Negotiation

The final stage where the deal is struck, before the lead exits the pipeline.

WHY SALES ASSISTANT APP?



Understanding CRM is complex

- Too much raw data which a salesperson wouldn't normally use

Useful analysis

- Drives profitable business by analysing the data and providing efficient lead tracking and management tools

Enhanced Team Collaboration and Communication

- Sales progress reports and summary analysis offers valuable insights

FEATURES OFFERED BY BOOSTR

Easy to use

- The pipeline data is easily available, with updates on news about leads.

Group by location / partners

- Get a deep view of partners sales and marketing activities to optimise deal flow

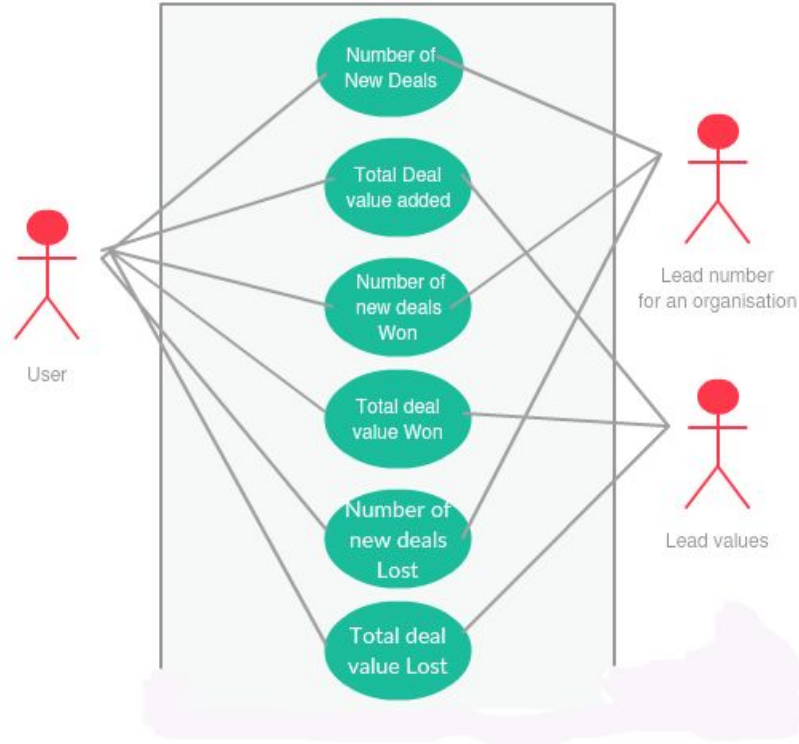
Sales analytics and Lead allocation

- Individual pipeline statistics and sales summary statistics provide good ground for useful comparisons

A Chat Bot !! (planned feature)

- Sales persons can get insightful data on a virtual chat bot

Sales Performance

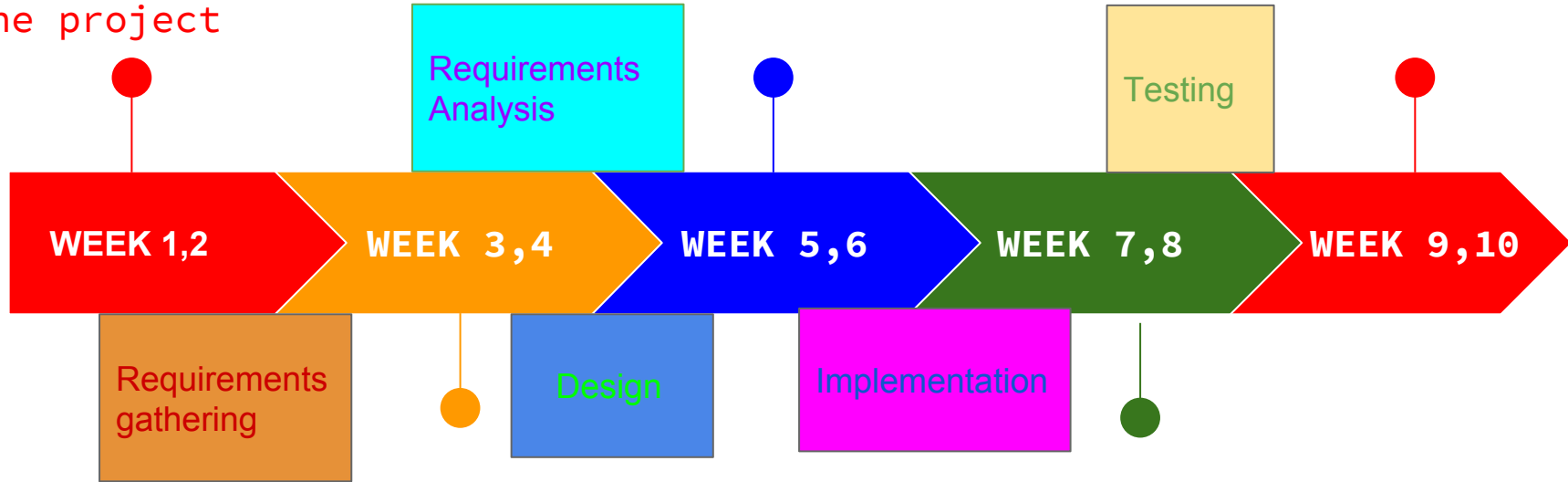


PROJECT TIMELINE

Initial Contact
and Overview of
the project

Documentation of
deliverables and
division of work

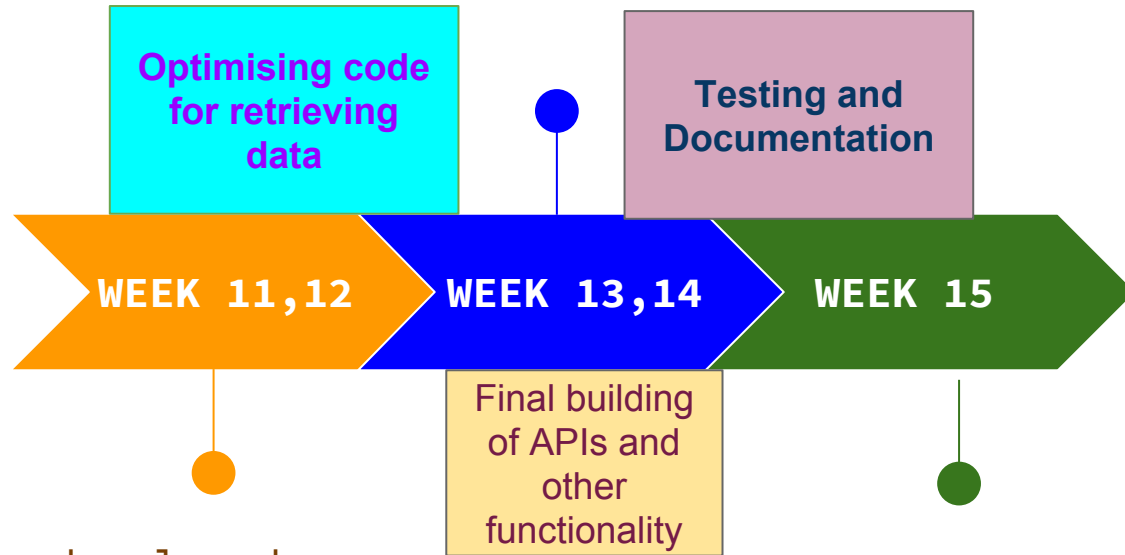
Coding and
testing, Project
Release 1



Learning technologies
(MEAN stack) and going
through existing code
base.

Understanding and
coding: Sales Summary,
Overall stats and Sales
Pipeline Stats

The APIs were built conforming to requirements and functions scheduled per day and logged



Methods were developed to optimise on space and time as large data is involved

The APIs were tested against various boundary cases so that they are ready to go into production

GOALS ACHIEVED BY R-1

Building models for the users of the Sales Boosting app
“Boostr”

The modules developed are:

- **Overall Company Stats** - Adding computed data to database for every organisation, API partly ready
- **Sales Summary Stats** - Models designed, Summary calculation for number of leads complete
- **Pipeline Stats** - Models designed, Calculations for one stage complete

GOALS ACHIEVED BY R-2

Building API's for the users of the Sales Boosting app
“Boostr”

The modules developed are:

- **Overall Company Stats** - For every organisation the lead status is rendered in the form of JSON. API complete
- **Pipeline Stats** - Calculations are performed for every lead stage and document created, API complete
- **Sales Summary Stats** - Monthly statistics based on Wins and Losses for all the leads created, API complete.

cronJob is used to schedule the running of the modules.

DEMO

DEVELOPMENT ENVIRONMENT

- Programming Language:

JavaScript

- Technologies used:

NodeJs, ExpressJs

MongoDb, Mongoose

CronJs, MorgonJs

Async.js, KueJs

TESTING ENVIRONMENT

- API Testing

Postman

Swagger

- Database Testing

Compass

MongoDB

ACKNOWLEDGEMENTS

We would like to thank our professor, Dr. Raghu Reddy, and TA, Jayaganesh Kalyanasundaram for their guidance.

We are also indebted to our client, Mr. Chirag Choudhary and his team (most importantly, Vishwanath Reddy) for their continued help and support.
