1. User group structure:

* Regional Marketing Manager: [Full access (read and write)]
* District marketing manager: [Full access (read and write only within assigned district]
* Home office Marketing: [Limited access (read only within assigned territory)]
* Marketing Representative: [Full access (read, write only within assigned territory)]

1. MR will have their own territory and they are restricted to own territory. It is same with RMMs and DMMs, they will have their own assigned region and district respectively. The Territory is coded with 4-digit numbers for identification.
2. Types of Clients:

* Insured
* Top 100s
* Top Prospects
* Uninsurable

Top prospects’ every information like birthday, anniversary dates are required.

1. Data needed from clients:
   * Company Name
   * Email Address
   * Telephone

It should have description column to take notes about the conversation in phone. This helps him to analyze the level of prospects, insured or uninsurable.

* + Clients should fall under any one of the following category of business to be insured under Federated.
    - Auto and Truck Dealers
    - Auto parts stores
    - Building materials dealers
    - Cabinet and custom woodworking shops
    - Contractors
    - Equipment Dealers
    - Funeral services professionals
    - Jewelers
    - Machine and tooling operations
    - Petroleum Marketers
    - Petroleum Transport
    - Printers
    - Tire dealers

1. The system is expected to have some simple features.
   * Important dates’ tracking should be easy.
   * Should have features to schedule anything important
   * Remainder notifications are considered life-saving.
   * Outlook integration for emails is also a demand.
   * Update, delete and change of records should be easy but authorized.
2. The system should be mobile friendly.
3. Calculation of the commission for each marketer based on their sales should also be easy and is only accessible to DMM and related MR.
4. **Federated have some outside associations. These associations also recommend federated to eligible clients.**
5. **After some interval of time, some reports and reviews of the works need to be presented to superiors. The system should be able to generate the following types of reports and reviews:**

* Financial analysis report – to analyze present financial state of the company and find out possible measure to improve the business.
* Client statistic report – to report rise or fall in number of clients with reasonable views on it.