**MR – Marketing Representative**

**Description:**

A person who sells policies on behalf of a company. Marketing Representatives oversee assigned territory (1:1 ratio)

**The System Data Input:** Client Info, Meeting Date

**The System Data Output:** Client info, Reminder, New MR Tasks.

**DMM – District Marketing Manager**

**Description:**

Person who oversees the Marketing Representatives within his assigned district.

**The System Data Input:** Tasks for MR

**The System Data Output:** Reports, New DMM Tasks

**RMM – Regional Marketing Manager**

**Description:**

Person who oversees the District Marketing Managers within his assigned region.

**The System Data Input:** Task for DMM

**The System Data Output:** Reports

**Processes:**

**Process 1.0 "Add Client info"**

**Incoming data Name:** Client Info

**Outgoing data Name:** Client info

**Process Description:** whenever the MR wants to add new client info to the system, he needs to click the add button in the UI then the system will capture the data that have been entered about the client and store it in the system.

**Process 2.0 "Search a Client"**

**Incoming data Name:** Client info

**Outgoing data Name:** Client info

**Process Description:** When the search button is clicked in the UI and a Client is searched from the database, this process will be triggered, and it will deliver the search result to the user.

**Process 3.0 "Display Reminders"**

**Incoming data Name:** Birthday info, Policy Expiration Date, Meeting Data

**Outgoing data Name:** Reminder

**Process Description:** This will display reminders to the user through the UI. This process is triggered by the time and date of the event. When triggered, either birthday info, policy expiration date or meeting date will be retreater to display in the UI.

**Process 4.0 "Schedule Client Meetings"**

**Incoming data Name:** Meeting Date

**Outgoing data Name:** Meeting Date

**Process Description:** This process will store client meeting dates into the MR’s calendar. The process is triggered when the MR clicks on the “Schedule New Meeting” button from the UI.

**Process 5.0 "Assign Tasks from Managment"**

**Incoming data Name:** Tasks for MR, Tasks for DMM

**Outgoing data Name:** New DMM Tasks

**Process Description:** This process lets the RMM assign assignments for the DMM to complete. This process is triggered after the RMM clicks on the button that allows her/him to add an assignment for the DMM.

**Process 6.0 "Generate Management Reports"**

**Incoming data Name:** Client info

**Outgoing data Name:** Report

**Process Description:** After the Client’s information has been saved, this process creates a report for the DMM and RMM. This process is automatically triggered after a client’s record has been stored.

**Data Stores:**

**D1: “client Records”**

**‘Client’**

* Client\_ID [int(50)]
* Client\_Fname [char(50)]
* Client\_Lname [char(50)]
* Client\_role [char(100)]
* Client\_email [char(50)]
* Client\_phone [int]
* Client\_stAddress [char(100)]
* Client\_state [char(2)]
* Client\_city [char(50)]
* Client\_zip [char(50)]
* Client\_type [char(2)]
* Client\_DOB [date]
* Client\_general\_notes [char(max)]

**D2: “MR Calendars”**

**‘Meeting Per Client’**

* [PK] MPC\_ID [int]
* [FK] Client\_ID [int]
* [FK] Meet\_ID [int]
* Meet\_Date [date]
* Meet\_Notes [char(max)]

‘**Meetings’**

* [PK] Meet\_ID [int]
* Meet\_name [char(50)]
* Meet\_description [char(max)]

**D3: “Task Records”**

**‘Tasks’**

* [PK] Task\_ID [int(50)]
* [FK] Assigned\_to [char(50)]
* [FK] created\_by [char(255)]
* Task\_name [char(50)]
* Task\_description [date]
* Task\_priority [int(50)]
* Task\_dueDate [int(50)]