

## Web-Based ERP for Financial Sales Management

### Project Overview:

This ERP system is designed to manage and track the sales of financial products, monitor employee performance, and facilitate managerial and administrative operations efficiently. It will include features for employees, managers, and the admin/management team.

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### Core Functionalities:

#### 1. Sales Data Management

- Record details of sales transactions
- Track date of sale, amount of sale, and premium details
- Store customer information (Name, Phone number, Email ID, Nominee details)
- Maintain product details (Product name, Date of sale, Amount of sale, Premium Payment Term, Payment Mode/Frequency)

#### 2. Employee Data Management

- Employee profile (Name, Designation, Date of Joining, Reporting Manager)
  - Assign expected/minimum monthly, quarterly, and yearly targets
  - Track sales performance (Monthly, Quarterly, and Total Sales done)
  - Monitor incentive slabs achieved (Category-based tracking)
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### Dashboards & User Roles

#### 1. Employee Dashboard

- View personal performance metrics
- Track pending targets (Monthly, Quarterly, and Yearly)
- View currently running sales contests
- Monitor personal sales and incentive achievements
- **User-friendly and visually appealing interface** with multiple colors highlighting performances

#### 2. Manager Dashboard

- Add, edit, or remove team members
- Assign targets to team members (Monthly, Quarterly, Yearly)

- Record and track team sales (Assigning sales to respective employees)
- Send alerts to underperforming employees
- Add and manage sales contests
- View personal and team performance, target pendency, and incentive slabs
- **Intuitive design with clear visual indicators** to easily track team performance

### 3. Admin/Management Dashboard

- Monitor all team managers and their respective teams
  - Assign targets to team managers
  - Add or remove team managers
  - Access full administrative control over sales, targets, and incentives
  - View detailed performance reports at all levels
  - **Beautiful and engaging dashboard** to ensure clarity and accessibility of data
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### Project Team & Responsibilities:

#### Team Composition (26 Members):

- **Project Manager (1)** - Responsible for overseeing project execution, ensuring timely delivery, and managing deployments (including DevOps responsibilities).
- **Business Analyst (1)** - Defines requirements and aligns them with business goals.
- **UI/UX Designers (5)** - Design engaging and attractive dashboards with performance indicators and multi-color themes.
- **Frontend Developers (10)** - Develop user interfaces for employee, manager, and admin dashboards.
- **Backend Developers (8)** - Develop core logic, APIs, and data processing functionalities.
- **Database Administrator (1)** - Manage database schema, queries, and optimizations.

### Key Responsibility Areas (KRA) & Key Performance Indicators (KPI):

#### UI/UX Designers:

- **KRA:** Create intuitive, attractive, and user-friendly interfaces.
- **KPI:**
  - Completion of wireframes and designs within 3 days.
  - Ensure consistency in UI elements across all dashboards.

- Gather feedback and implement design improvements within 1 day.
- Achieve at least 95% positive feedback from stakeholders.

#### **Frontend Developers:**

- **KRA:** Implement UI components and ensure seamless user experience.
- **KPI:**
  - Develop and integrate frontend modules within 5 days.
  - Ensure 95% bug-free UI in first testing cycle.
  - Optimize code for responsiveness and performance.
  - Maintain API integration efficiency with <200ms response time.

#### **Backend Developers:**

- **KRA:** Develop APIs and manage data processing functionalities.
- **KPI:**
  - API development completion within 5 days.
  - Ensure 98% successful API response rate.
  - Achieve <300ms response time for all database queries.
  - Maintain system uptime of 99% post-deployment.

#### **Database Administrator:**

- **KRA:** Optimize data queries and ensure efficient database structuring.
- **KPI:**
  - Database setup and query optimization completed within 4 days.
  - Ensure all queries execute in under 500ms.
  - Implement data security and backup procedures before project go-live.

#### **Project Manager:**

- **KRA:** Ensure project completion within timeline and oversee all roles.
  - **KPI:**
    - Completion of all phases within 8 days.
    - Minimal delays in TAT (Turnaround Time) across all teams.
    - Ensure at least 90% task completion within defined sprint timeline.
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### Project Timeline:

- **Total Duration: 8 Days**
  - **Day 1-3:** Requirement finalization & UI/UX design.
  - **Day 4-5:** Backend & Frontend Development.
  - **Day 6:** Database setup & API integrations.
  - **Day 7-8:** Testing, bug fixing, and deployment.
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### Additional Features:

- **Automated Performance Tracking:** Real-time updates on employee and team performance.
- **Target Alerts:** Notifications for employees falling behind on targets.
- **Sales Contests & Incentives:** Manage and track sales-based competitions.
- **Role-Based Access Control:** Secure data access depending on user role.
- **Reports & Analytics:** Generate insights on sales trends, employee performance, and incentive achievements.
- **Attractive UI with a multi-color theme** to enhance usability and engagement.

This ERP system will streamline financial product sales, improve accountability, and enhance target achievement tracking for employees, managers, and the admin team, all while offering a visually engaging and easy-to-use interface.