

Hello.

Sales Rep WebApp & Admin Dashboard

 Product Requirement Document (PRD) for Development

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Project Brief

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Overview

The client came to Superteam UX Design Agency with a need for a comprehensive solution to streamline their sales reps' data collection and task reporting. They require both the design and development of a role-based web platform, including a Sales Rep Web App for outlet management and an Admin Dashboard for performance tracking and business insights.

Project Goal

The primary goal is to streamline field reporting and centralise business-relevant data so leadership can monitor performance and make informed decisions. All designs have been completed, and the client is now looking for a development team to bring the system to life.

Key Features

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Users

We have 4 Kinds of users.

1. Owner
2. Admins
3. Team managers
4. SRs(Sales representative)

The app (with the mobile screen) is for the SRS. This will have to be a web application.

Owner

- Owner will be the super admin.
- He will be in charge of the whole dashboard.
- He can assign admins to carry out administrative workflow.
- He can manage team managers.
 - Assign tasks to managers.
- Can manage SRs.
- Can send notification to all the SRs.
- Will be able to send bulk messages to all the gathered mobile numbers at once.

Admin

- Admins can do everything that the owner can do.
- Admins will be assigned by the owner.

Managers

- Managers will be added by the admin/owner.
- Managers will manage the SRs.

SRs

- They will be added by the admins/owner/managers.
- They will create outlets. One or multiple. In or more divisions or upozilla's.
- Complete outlet info gathering.
- Complete documentation if necessary.
- Regularly update their tasks which will be directly monitored by the managers.
- Will have badges based on their performances.

Special requirements

- The whole application must support Bangla Language.

Home Page

This is the home page for SRS.

- It will have four clickable cards.
- A notification button.
- A static Attention board for the SRs.
- A bottom navigation bar with 4 tabs.
 - Home (This is the current home page for the SRs)
 - Outlets
 - My Task
 - Account

The Outlets Page

Main 4 features available to the SR's from this page:

1. Create an outlet feature

Form Step1: Outlet information

- A two step form for creating the outlet.
- Form Step1: Outlet information
- Some form fields for collecting information.
- In addition, A serial number will automatically be created by the backend.
- (Important) If the outlet belongs to dosen or not. If it does then a form field will be shown conditionally. And depending on this the sr will need to do the documentation.

Form Step2: Upload image

- Upload images of Visiting card and outlet Banner.
- The form will indicate which step the sr is currently on.
- The form will have an offline feature. If a user goes offline while filling the form the form data will not be lost.
- After form submission the form will show a success or failure state with animation.

Viewing details of a single outlet

- Will have 3 tabs.
- Information: Shows information about the outlet.
- Images: Shows the images of the outlets. Will be able to change the images from here.
- Documentation: Will be able to complete documentation from here by taking or retaking images and uploading them.

2. My Outlets feature

The SRs will be able to view the outlets here.

1. This page will list all the outlets.
2. Will be able to search here with a search bar.
3. Outlets will be shown in different tabs with upozilla names.

Task Page

This page will,

- Show a calendar and two main sections:

1. Today's Task section

- Will show a list of tasks divided into 3 tabs.
- Two types of tasks.
 - Completed: If completed the user can no longer visit the task.
 - Not completed: If not completed, the user can visit the task and then complete it.

How can a user complete a not complete task?

User will go through a two step process here to complete his task.
Important: will determine if documentation is needed or not.

Step 1:

- Will upload three images here
- Will be able to retake images as well.
- IMPORTANT: User must use his camera to take the image. Picking images from the gallery is strictly prohibited.

Step 2:

Click the add brand button. Then, Fillup a form with the following fields.

- Brand Name(only 62 brands)
- Brand Products(only 5 categories)

2. No updates section

User will go through a two step process here to complete his task.
Important: will determine if documentation is needed or not.

1. Tasks will be visible into two tabs. No Updates and Late Update.
2. SRs will be able to update the tasks through the same procedure.
3. The tasks will be labeled as either “No Update” or “Late Update”

Personal information

This section is not editable by the SR. Will be managed by the team manager.

Will show all the info into 3 tabs

1. Bio
2. NID Image
3. Working Area.

SRs will be able to upload their images here.

My History

Will have

1. A calendar. Will show different task status.
2. A section with 3 tabs. No updates, late update and Incomplete Doc.

Dashboard

This page will have the following three main sections.

1. Section1: 4 cards.

- Card1: Shows total number of Srs with some other basic info.
- Card2: Shows aggregated performances of all the SRs.
- Card3: Shows aggregated statistics of Outlets.
- Card4: Aggregated Outlet documentation statistics.

2. Section2(Market Share):

A graphical and map view statistics. Map view will show a color for each division. The color will indicate which company is the most dominant in that division. Graph view will show a bar chart with outlet coverage values for each brand.

3. Section3(Update Issues):

Shows a bar graph which shows “No Update” vs “Late Update” data in each bar. Also has Division, District, Upozilla and Date filters.

4. Section4(Brand Performance):

Will show a graph which shows individual brand performance. Will have Division, District, Upozilla, Brand and Date filters.

My Team page(for the managers)

- Will list out all the managers
- Will be a button to add a manager.
 - Will have a change password feature.
 - Send login details feature.
 - Delete account
 - Drag drop profile image

SRs page(for the SRs)

1. Will have profile and activities tabs that will show details for each SR.
2. Will be able to add sr.
3. A table to manage the srs.
4. Export srs info.
5. Notify Srs.

Outlet page

Will have 3 tabs.

1. profile
2. update history: will have the total update history
3. notes.

Brands

1. Will have details on the pre mentioned 62 brands.
2. And a page that shows all the details and graphs for a single brand.

Tasks

1. Will be able to assign tasks here with different priorities.
2. This is only for assigning tasks to the managers. This is not for assigning any task to the SRs.

Design Status

- The UX design has been completed by our team.
- Client has already approved the design and UI is connected with Design System.
- UI prototypes are ready and will be shared with shortlisted teams in the next phase.

Development Status

We are currently in the process of identifying a development team to take this project forward. We expect the development team to not only build the platform based on our completed designs but also provide DevOps support for smooth deployment, hosting, and ongoing maintenance.

The goal is to deliver a stable, scalable, and secure system that the client can rely on without needing to manage future technical upkeep. This includes ensuring role-based functionality, responsive UI, performance tracking, and outlet management features are fully functional. Clear communication, timely progress, and long-term support are essential throughout the collaboration.

Next Steps

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Next Steps

If this PRD aligns with your capabilities and interests.

Please submit a brief technical proposal that includes:

- Estimated timeline and rough budget
- Any clarification questions
- Preliminary feedback or suggestions

Shortlisted teams will be provided with:

Full access to UI/UX design files and user flows

A follow-up discussion call to align on scope and expectations.

Thank you for reviewing. We look forward to collaborating.

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