Requirement Analysis of Agent Apps

1. Requirements of Metal Private Ltd.

* There are 3 phase module:
  1. Marketing
  2. Sales
  3. Collection

These modules will require the MPL business process. The company Tractors sales or other Agro machineries are in credit terms with MPL. The main concern and the most important module is the collection of loan amount periodically by the territorial officers of the company. We need to track the Territorial officer or agent for tracking their loan collection visits and keep an accounting of their collection & deposits.

* The company needs two different applications, one for administrative (Admin Application) purpose and the other is for the territory officer or (Agent Application) to leverage the money collection process.
* Agent Application:
  1. A territory officer will be able to see his schedule of visiting the customer. The schedule has been fixed during the sales of a Tractor with the EMI details and other detailed information of the customer.
  2. In case of difficulty in collecting the money according to the fixed-schedule, the territory officer will be able to reschedule the date.
  3. In case of rescheduling the fixed-schedule, the territory officer may have the ability to put up a reason for rescheduling via the apps. The possible reasons for rescheduling can be no-payment, partial-payment or others.
  4. Attending a marketing event about a couple of times in a month can be a schedule for an individual territory officer. So, there can be multiple types of schedules.
  5. The territory officer will get notifications of visiting the customer according to the schedule.
* Admin Application for tracking an agent:
  1. The admin can see the status of the scheduled completion along with the route or path took on the map to visit the customer per territory officer. In other words track the territory officer.
  2. There are facts in between money received by the territory officer and transferring the amount to the company A/C. Sometimes the agent delays to send to A/C or even they don’t send to A/C at all. Necessary actions to take to verify successful transactions with scan copy of money receipt. Proper synchronization of company A/C and money transferred by the territory officer need to maintain.
* Different types of customers are available; such as regular, payment missing, defaulter etc. The money collection schedule may depend on the customer’s type.

1. Requirements of DMA
   1. DMA needs to have a meeting with the DB team of Metal Private Ltd. to understand the required DB relations to conduct the development work for the Smart Tracking over GPS.
   2. DMA needs some historical data of the customers and interrelated data. Example: Agent details, Customer details, fixed schedule details, Account details, Agent report details, etc.

Fig: Wireframe of Agent Application

Collection reminder schedule

DB

user\_profile

DB

catalog

Collaterals

Purchase Details

Purchase history

Defaulter or not

Event schedule

Collection schedule

Reason of reschedule

Put date in between due date

Product details

Customer details

Loan details

Payment details

Scan copy of money receipt

Location send

Success payment

DB

agent\_account