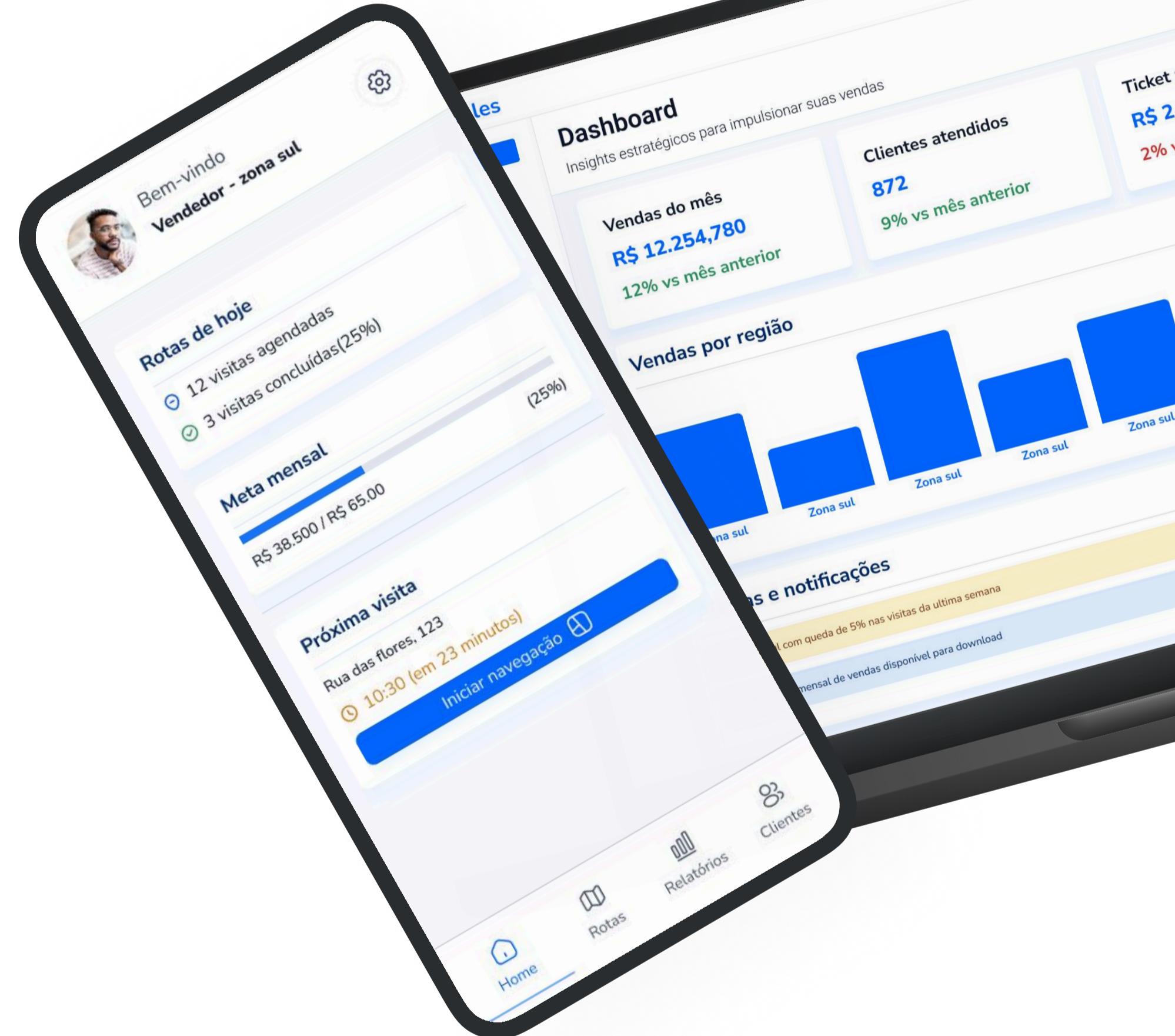


Challenge Case

Tracksales

Management Platform

Lucas Uchôa





TrackSales – Field Sales Management Platform

General Context:

- Project created to optimize the daily routine of door-to-door sales teams
- Composed of two components: mobile version (aimed at salespeople) and desktop version (directed at managers)
- Requirements were extracted from benchmarking with similar solutions

Objective: Create a solution that concentrates the entire field sales process (routes, goals, visit records, and orders) in an efficient and intuitive experience.

Project Objectives



Optimize Field Routine

- Intelligent route planning and quick visit registration.

Centralize Data in Real-Time

- Goals, sales, customers, and routes in a single platform.

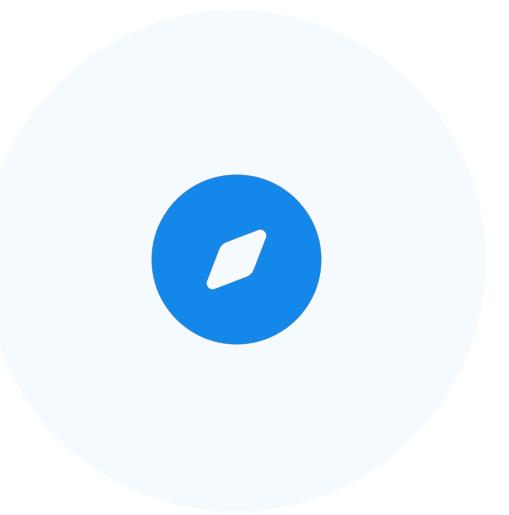
Improve User Experience

- Intuitive and engaging interface (for both salespeople and managers).

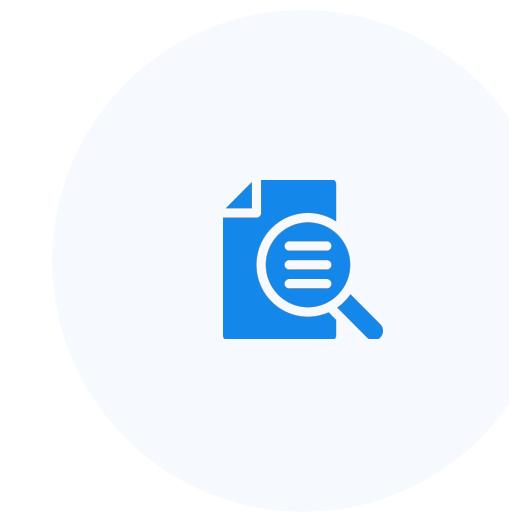
Provide Strategic Support

- Advanced dashboards and reports for decision-making.

Creative Process



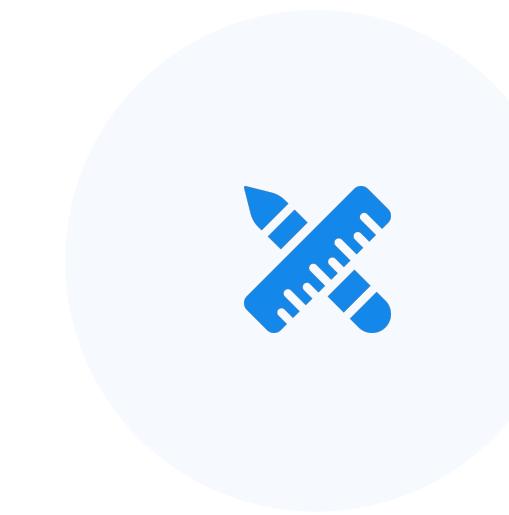
Research



Requirements



Ideation



Design

Competitor Analysis

Competitor 1: Salesforce Field Sales

Robust interface, highly customizable and part of the Salesforce ecosystem, but complex and with high cost.

Features :

- Customizable dashboards with drag and drop
- Real-time data visualization
- Mobile app with offline functionality



field service lightning



Competitor 2: Repsly

Focus on door-to-door sales; simple and intuitive interface, but with limited analysis resources compared to premium solutions.

Features :

- Clean interface focused on quick actions
- Central interactive map
- Simplified check-ins (few touches)

Competitor Analysis

Competitor 3: SalesRabbit

Specialized in door-to-door sales, with integrated maps and CRM; interface may seem "loaded" to some users.

Features :

- Interactive maps with color coding
- Visual sales pipeline management
- User profile-adaptable interface



Competitor 4: FieldForce

Focused on simplicity and performance on older devices; basic analytical resources and less sophisticated visuals.

Features :

- Task-oriented minimalist interface
- Large and intuitive icons
- Robust offline functionality

Competitor Analysis

Competitor 5: Badger Maps

Excellence in route planning and customer visualization on the map; fewer team management resources.

Features :

- Maps with intuitive filters
- Lead/customer classification via colors
- Integration with popular CRMs



Competitor 6: Skynamo (FieldForce)

Focus on the salesperson's experience, especially for quick order capture and product catalogs; less advanced routes.

Features :

- Context-adapted dynamic forms
- Visual product catalog
- Clear performance dashboard

Competitor Analysis

Competitor 7: RouteSavvy

Specialized in route optimization, with a more technical interface and few CRM resources.



RouteSavvy
It's your time and money. Make the most of it.

Features :

- Visual optimization algorithms
- Drag-and-drop for manual adjustments
- Color coding for visit types



Competitor 8: Spotio

Modern interface with advanced gamification; may have a higher learning curve and elevated cost.

Features :

- Scoreboards and trophies to motivate the team
- Internal "social network" visual
- Maps with performance heat maps

Trends and Opportunities



- **Simplicity vs. Functionality:** Balance between light interface and advanced features.
- **Offline Performance:** Intelligent synchronization and clear status for the user.
- Device Adaptation: Truly responsive design is a differential.
- **Gamification:** Motivates salespeople but must be integrated in a non-distractive way.
- **Maps + Data:** Well-structured geographic integration without confusing the user.
- **Profile Personalization:** Differentiate the experience for salespeople and managers.
- **Data Capture:** More agile input methods (voice, photos, etc.) can be innovative.

User Needs



Field Salespeople:

Ease of Use: Intuitive interface and few steps to record sales and routes

Quick Access: Information even in areas without good connection (offline mode)

Motivation: Feedback on goals and achievements

Managers and Administrators:

- **Real-Time Overview:** Monitoring of team sales and routes
- **Analysis and Reports:** Filtering and reports for decision-making
- **Flexibility:** Customization of goals, teams, permissions

Requirements Gathering (Mobile)

With data extracted directly from benchmarking, I was able to objectively map user needs and bring application requirements.

Functional Requirements

Customer Management

- View/filter customers (by loyalty, tier).
- Access details of each customer (contact, address).

Route Management

- Display routes for the day, track visits (completed vs. scheduled).
- Interactive maps for navigation and route planning.

Visit Management

- Start/end visit, record duration and status (with order or not).
- Possibility of immediate contact (call, message).

Order Management

- Search products, adjust quantities, apply discounts.
- Finalize/cancel order, add observation notes.

Reports and KPIs

- Track monthly goal, conversion rate, top products, etc.
- View daily/weekly progress with indicators.

History

- Access customer order and visit history.
- See date and result of the last interaction.

Non-Functional Requirements

User Interface

- Tab navigation (Home, Routes, Reports, Customers).
- Responsive and mobile-friendly layout.

Geolocation

- Integration with map services, route calculation and estimated time.

User Profile

- Display salesperson data, personal metrics, area of operation configuration.

Data and Synchronization

- Local data recording for offline use.
- Subsequent synchronization when reconnecting.

Requirements Gathering (Desktop)

Functional Requirements

Dashboard and Analytics

- Display KPIs such as monthly sales, effectiveness, period comparisons.
- Allow download of reports and visual alerts.

Team Management

- Mapped salespeople (real-time location).
- Filter by status (active, on route), track planned vs. completed visits.

Territory Management

- Create and edit territories on the map, assign salespeople.
- Balance and redefine boundaries according to demand.

Customer Management

- Add/edit customers, classify by tiers (1, 2, 3).
- View visit history and assign a responsible salesperson.

Management Reports

- Cover sales by region, product, period; team performance.
- Identify inactive customers, top performers, sales projections.

System Configurations

- Adjust tracking, offline check-in, synchronizations, and permissions.
- Manage backups, integrations, and notifications.

Non-Functional Requirements

User Interface

- Side menu for main access, use of cards and graphs.
- Colors and icons to represent status and reports.

Geolocation and Maps

- Integration with map APIs (Google Maps, etc.).
- Visual representation of territories in distinct colors.

Security and Permissions

- Access levels, log control, and automatic backup.

Integration and Synchronization

- Connection with external CRMs, ERPs.
- Automatic synchronization and adjustable intervals.

Personalization

- Support for different languages, date formats, currency.
- Alert configuration, company logo upload.

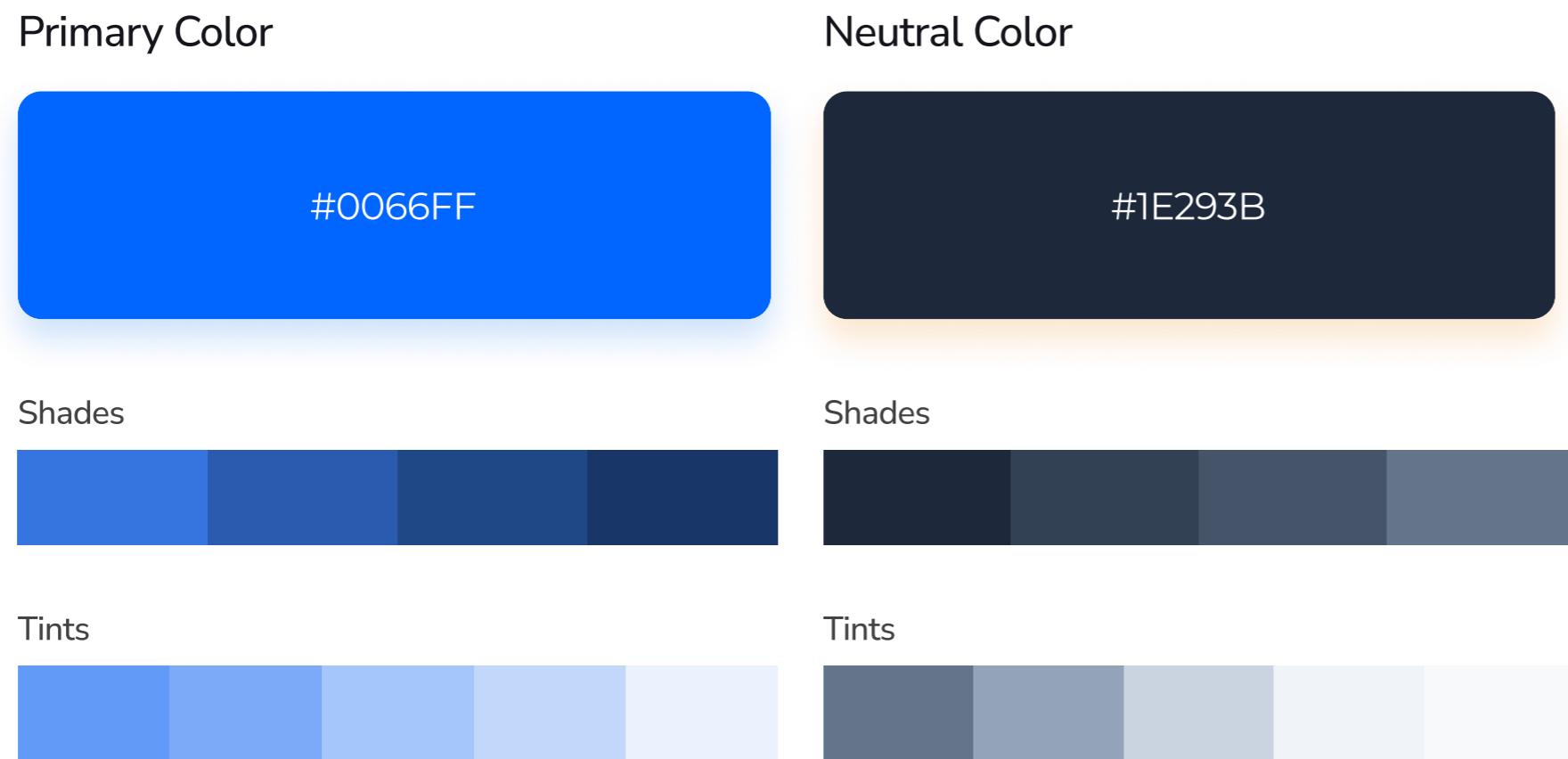
Performance

- Real-time data, scalability for increased users and sales volume.

Style guide 🎨

With the technical part consolidated and requirements aligned, I then dedicated myself to the creative part, establishing the visual parameters of each application.

Color Palette



Typography

Aa **Font**
Nunito sans

Aa Nunito sans Bold **Aa** Nunito sans Semibold **Aa** Nunito sans Medium **Aa** Nunito sans Regular

Name	Font Size	Line Height
Heading 1	24 px	46 px
Heading 2	20 px	28 px
Body - Large	18 px	26 px
Body - Regular	16 px	22 px
Body - Small	12 px	18 px

Design system? 🤔

Being a multi-platform application, I chose to develop two variations of the design system – one for mobile devices and another for desktops. Although they have been simplified to meet the restrictions of each platform, both remain consistent and robust.

Mobile Version Screens

Based on the mobile-first approach and prioritizing the needs of the field salesperson, I started the creative process with the mobile version of the application.

Login Screen

Access your account!

CPF
000.000.00-00

Password

[Forgot your password?](#)

Login

About

Secure entry portal to the TrackSales application, with simple fields for your personal information and password recovery option if needed.

Salesperson Dashboard

Welcome
SELLER - South Zone

Today's routes
12 scheduled visits
3 completed visits (25%)

Monthly goal
R\$ 38,500 / R\$ 65,000 (25%)

Next visit
Rua das Flores, 123
10:30 (in 23 minutes)
Start Navigation

Home **Routes** **Reports** **Customers**

About

Intuitive panel showing your daily progress, with planned visits, completion percentage, and monthly goal tracking, as well as alerting about your next commercial visit.

Route Planner

Welcome
SELLER - South Zone

Condomínio Paulo Miranda
Atelier Nicole Santos

Add route to GPS

Next visits
1 - Marcelo Bakery
10:23 - Rua das Flores, 123
Arriving in 23 minutes

Home **Routes** **Reports** **Customers**

About

Travel guide with estimated arrival time to the next customer, allowing better time management between commercial visits.

Active Visit Assistant

Welcome
SELLER - South Zone

Marcelo Bakery
10:23 - Rua das Flores, 123
(83) 99668-4456

Call **Requests** **Photos**

Visit underway
Started 30 minutes ago

Historic
Last visit:
Last request:
Products: sodas, dairy products

Register Product +

Uncertain **Finish**

Home **Routes** **Reports** **Customers**

About

Practical tool that tracks your ongoing visit, offering quick access to contacts, customer history, and new product registration during the service.

Digital Product Catalog

Welcome
SELLER - South Zone

Catalog of Requests
Search for products

All **Promotions** **Recent**

Coca-Cola
Code: RF001
R\$ 8.90

Coca-Cola
Code: RF001
R\$ 8.90

Coca-Cola
Code: RF001
R\$ 8.90

Cart: 3 items R\$ 26.7

Home **Routes** **Reports** **Customers**

About

Sales tool with a clear listing of available products, showing prices, updated stocks, and easy quantity control for the shopping cart.

Sale Finalization

Welcome
SELLER - South Zone

Order **Tab**

Marcelo Bakery
Condition: 90 days - 5% discount

Order summary
Coca Cola 2 soda R\$ 44.90
5 un x R\$ 8.90
Coca Cola 2 soda R\$ 44.90
5 un x R\$ 8.90

Subtotal R\$ 548.60
Discount (5%) R\$ -27.43

Total: R\$ 521.17

Finish request

Cancel **Add**

Home **Routes** **Reports** **Customers**

About

Complete summary of the order, presenting selected items, special payment conditions, automatic discount calculations, and final value for customer approval.

Monthly Sales Analysis

Welcome
SELLER - South Zone

Reports
General data **By items**

March

Monthly goal (95%) **Total Sales** R\$ 38,500

Sales per week

TOP PRODUCTS

Coca-Cola 2L R\$ 5000.99
Mineral water R\$ 4000.99
Natural juice R\$ 3000.99
CREAM CRACKER cookie R\$ 2000.99

Per value **Per unit**

Home **Routes** **Reports** **Customers**

About

Overview of March's commercial performance, highlighting progress toward the goal and a colorful graph showing the best sales days of the week.

Product Ranking

Welcome
SELLER - South Zone

Reports
General data **By items**

March

TOP PRODUCTS

Coca-Cola 2L R\$ 5000.99
Mineral water R\$ 4000.99
Natural juice R\$ 3000.99
CREAM CRACKER cookie R\$ 2000.99

Per value **Per unit**

Home **Routes** **Reports** **Customers**

About

List of the month's best-selling items, such as soft drinks and mineral water, with highlighted values and visual progress bars for quick comparison between products.

Detailed Customer Profile

Welcome
SELLER - South Zone

Marcelo Bakery
Rua das Flores, 123
Tier 1 02/15

GOOD PRICE SUPERMARKET
Rua das Flores, 123
Tier 2 01/20

Bakery
Rua das Flores, 123
Tier 2 More than 30 days

Order history
02/15/2025 - R\$ 2.500.94
01/28/2025 - R\$ 1.500.94
12/24/2024 - R\$ 3.500.94

See complete history

Home **Routes** **Reports** **Customers**

About

Complete visualization of Marcelo's Bakery information, showing important contacts, address, and a financial history of recent orders for better customer relationship.

Desktop Version Screens (Manager)

Next, I started developing the desktop version, focusing on facilitating strategic team management and optimizing sales KPI tracking.

Login Screen

About

Modern and secure entry screen to access the revolutionary external sales management system. With clean design in blue and white tones, it offers quick access through your CPF (Brazilian ID) and personal password. Modern and secure entry screen to access the revolutionary external sales management system. With clean design in blue and white tones, it offers quick access through your CPF (Brazilian ID) and personal password.

Commercial Dashboard

Sales of the month
R\$ 12.254,780
12% previous month

Customers served
872
9% previous month

Average ticket
R\$ 2.254,780
2% previous month

Effectiveness in visits
78%
12% previous month

Sales by Region

Seller	Sales	Goals
Carlos Silva	R\$ 145.320	95%
MARINA OLIVEIRA	R\$ 123.945	88%
Paulo Santos	R\$ 90.320	65%
MATHEUS SILVA	R\$ 80.320	60%
FELIPE SOLSA	R\$ 70.320	50%

Team performance

Alerts and notifications

About

See your sales success at a glance! Easy control of values, customers, and performance with colorful comparisons showing your month-to-month growth. Monitor all regions of operation and receive important alerts to never miss business opportunities.

Smart Salesperson Map

Team management
Manage your team

Team map

Active sellers (12/15)

Seller	Status
Carlos Silva	Active
Maria Sônia	Active
Lucas Augusto	In Progress
Antônio Fagundes	Stopped

Planned sales
124
60% of planned visits

Completed visits
97
78% effectiveness

Average time
24 minutes
Visited

Visits made
R\$ 38.730
Today

About

Manage your team with an intuitive visual that shows exactly where each salesperson is working. Track real-time visits, daily performance, and immediate results that transform data into concrete sales for your business to grow.

Commercial Territories Organizer

Territory management
Assign employees optimize zones and group customers

Team map

Territory details

About

Distribute customers strategically and maximize results! Design customized areas of operation, balance opportunities between salespeople, and visualize the financial potential of each region to conquer unexplored markets.

Digital Customer Catalog

Customer management
Add new customers, manage tier, prioritize services

About

Keep all important contacts organized with classification by importance, complete history, and automatic prioritization. Simple filtering that transforms relationships into recurring sales and increases loyalty.

Commercial Results Center

Management report
Extract the main KPI from its operation

About

Clear and objective reports that transform numbers into winning strategies. Salesperson ranking, visual comparisons, and success indicators that guide intelligent decisions to exceed goals every month.

Sales System Customizer

Settings
Configure important data, access, integrations and the like

About

Configure the platform your way! Simple adjustments of language, currency, notifications, and integrations that make the system adapt to your business. Automatic synchronization that keeps everyone informed even offline.

Thank you!!