

Sales Tracker

Staff Information Section

- First Name, Middle Name, Last Name
- Address
- Email
- Telephone (Home, Mobile)
- Roles (Admin, Customer Support and Team Leader)
- Will be able to add additional people

Customer Information Section

- First Name, Middle Name, Last Name
- Email
- Telephone (Home, Mobile)
- Billing Address (address, City, State, Zip Code and Country)
- Shipping Address (address, City, State, Zip Code and Country)
- Credit Card of the customer (Type of the Credit Card, Number of the credit card, Expiration date of the Credit Card, CVV Code of the Credit Card)
- Active
- Inactive
- Blacklist
- Notes

Store Information

- Store Name (Will be able to add multiple stores) This Stores will be connected to everything.

Product Section

- Product Name (Will be able to add multiple products)
- UPC
- ASIN
- Retail Price

- Reseller Price (**This will appear in the Reseller section NOT in the customer order section**)
- Product Picture (Will be able to attached product images)
- Weight (Oz, ml, lbs, ml, grams, dosage)
- Quantity (**This quantity will calculate how many left everytime theres an order**)
- Shipping (Have Categories: USPS, UPS, FedEx, Pickup **these section need to be able to add additional shipping method**)
- Shipping Fees
- Tracking Number (**Have two categories: Tracking Number and Reshipment Tracking Number**)
- Notes

Group Team Section

- Team Name (Example: Team A)
- Sales Agent Name (First Name and Last Name and Nickname)
- Notes

Order Entry Section

- Invoice Number
- Reference Number
- Date
- Name of the customer (First Name, Middle Name, Last Name) **This should be connected to Customer Information.**
- Email of the customer
- Telephone of the customer (Home, Mobile)
- Billing Address of the customer (address, City, State, Zip Code and Country)
- Shipping Address of the customer (address, City, State, Zip Code and Country)
- Payment Method (**Choices of CC, Paypal, or through Intermediaries such as Amazon and Ebay**).
- Credit Card of the customer (Type of the Credit Card, Number of the credit card, Expiration date of the Credit Card, CVV Code of the Credit Card)

- Product Name (This should be connected to the Product list).
- Product Picture
- What product ordered (This section is connected to the Product List)
- Quantity Ordered
- How many boxes shipped
- Shipping (Have Categories: USPS, UPS, FedEx, Pickup these section need to be able to add additional shipping method)
- Shipping Fees
- Tax Fees
- Intermediary Fees (This section will have option to add intermediary store name such as Amazon, Ebay etc.)
- Tracking Number (Have two categories: Tracking Number and Reshipment Tracking Number)
- Team Name
- Sales Agent Name (First Name and Last Name and Nickname)
- Total Sales (Total Price of the product ordered + shipping fee -Tax fee - Intermediary Fee = Total Sales)
- Notes

Final Reporting Section

- Can generate the Report (Excel and PDF)
- Can generate by Team's Sales with customer information, shipping, tracking, dates, Invoice #, Orders CC used, total sales amount, by dates, daily, weekly monthly, yearly and how many orders.
- Can generate daily, weekly, monthly, yearly and how many orders and shipment by store.
- Will be able to assign roles (Admin Roles, Team Leader Roles, Customer Support Roles)
- Will be able to search customers names, orders, shipping information, dates etc.
- Will be able to monitor and record time stamp of whoever download the reports, entered and edit orders etc.

OPTIONAL Still thinking

Order Submission

- Agents will be able to submit orders through a submission order form (Sample form will be provided)
- This form goes to each Team's Sales Tracker that the Admin, Customer Support and Team Leaders can access.
- Now...The question is...Can we move the approved orders to the main sales tracker above after review. By doing this, it can eliminate entering the orders again...