

Sales Management System

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1 Purpose

The purpose of this Sales Management System is primarily to keep the track of the sales representatives' activities as it is pretty much difficult to do so manually.

2 Scope

This project presents dashboard for business owners to manage the working of sales person, focuses on medium and small scale organizations where the major lacking is in people management. It also provides an insight to the business, individual performance of sales person and a better look into expenses on individuals by the business.

3 Introduction

We are implementing this system as a web app for now. Introduction contains the following subcategories.

3.1 Existing System

The present system is manual or semi-automated system for maintaining the record of the activities of sales representatives, which is a tedious process and also this method is full of ambiguities as it is next to impossible to verify the actual location of the employees.

The manual system has following disadvantages:

- Only big companies use their web portals, but others only use offline apps, and even the existing few apps don't track the location.
- Searching of particular information is critical, it takes lot of time.
- The existing system needs to save the information in the form of files and they need to be verified manually which is very tedious and not error-free.
- The manual system gives us no backup for data, some data may be lost due to mismanagement.

3.2 Proposed system

A single dashboard for almost all interaction between business and sales person. Sales Management System thus facilitate business owners and sales representative in many ways.

Advantages for business owners:

- Centralisation of business data helps in real time monitoring and remote management.
- This helps in real time billing and processing of orders.
- Tracking the location of the employees will help in work verification easily.

Advantages for Sales representative:

- Disbursement of travelling reimbursement properly.
- No document maintenance is required.
- Quick processing of orders.

4 Functional Requirements

Functional requirements are explained below:

1. Users must have valid User ID(email) and password to login.
2. Role based privilege management system.
3. Admin can register new user, update user details, retrieve user list and delete user.
4. Sales representative can retrieve only their details.
5. Can file order, view orders filed by them, cancel orders.
6. Can file working report for their interaction with different customers.
7. Can file expense report for their allowance(transport allowance, expense on behalf of the business).
8. Admin can mark status of an order: (in queue, processed, cancelled).
9. Can verify the expense report filed by the sales representative.
10. Can verify working report filed by the sales representative.
11. Location based travel reimbursement.
12. A display section for all UPI apps QR code to make it easy to collect payment.
13. API access authentication(user as well as role) to prevent misuse of the API.

5 Non Functional requirements

1. Secure access of confidential data (user's details).
2. Minimal user interface to not bog down the users in unnecessary details.
3. Data integrity is maintained by keeping a lot of validation and constraints in mind.
4. Keeping the front-end and the API separate makes it possible to switch to an Android app, in the future, easy.
5. The system will have high availability.

6 Software Tools

- Database Server: MySQL Server
- Client: Any web browser
- Version Control System: Git, Github
- Development Tools: Visual Studio Code, Postman(API testing)
- Project Management Tool: Trello
- Backend: NodeJS, Express
- Programming Language: Javascript, HTML, CSS, React

7 Deployment

The API back-end and the front-end server will be deployed on a Linux server, preferably having Ubuntu operating system.

8 Hardware Requirements

Any system that is capable of running a browser.