

P4 - Sales Force Automation

Project Specification



Mestrado Integrado em Engenharia Informática e
Computação

Sistemas de Informação

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Project Overview

The aim of this project will be to provide a platform to manage and coordinate a sales force's efforts, increasing productivity and sales.

This will be achieved through a tool that manages each sales representative's agenda, making it easy for the representative to consult his appointments and his scheduled visits to customers' locations.

It will also help with billing by registering and organizing sales orders and allowing the reservation of items, always taking into account the availability of the items in stock at the warehouse and updating it accordingly.

In order to be up to date with customers' needs and status it will also be possible to consult customer profiles, keeping track of the deliveries made and of their periodicity.

To achieve these goals, Primavera ERP's API will be used for sales management and connected to the web application, which will provide the interface.

Functionalities and Features

View	ID	Name	Description
CALENDAR	PANEL_005	Calendar	Allows salesmen to see and select the desired days of a certain month, highlighting days with events planned.
	PANEL_006	Events	List of upcoming events scheduled to occur sorted by date if no specific day is selected. If a certain panel is expanded, that event's detailed information will be displayed.
	BUTTON_003	Add event button	Allows a salesman to create and add detailed information to a new event that will be displayed on the calendar.
CLIENT	PANEL_003	Client overview	Allows a salesman to quickly contact a client, showing his picture, name and contact information.
	PANEL_004	Client information	Allows a salesman to switch between information, activity and notes tabs. The information tab will have the contact's full address, his email and possibly tags. The client's past orders will be available for consult in the activity tab.
	BUTTON_002	Edit client button	Allows a salesman to edit and/or update his client's information.
MANAGE_CLIENTS	BUTTON_001	Create client	Allows a salesman to add a new client and his contact information and details.
	PANEL_002	Clients list	Allows a salesman to consult the list of all his clients and show the results of a client search.
CATALOGUE	PANEL_010	Item list	Allows the salesman to consult a list with all the company's products and their general information.
ORDER	PANEL_008	Order status	This panel will display the total price of an order, its status and other relevant details like the shipping address and client name.

	PANEL_009	Order items	This panel will display all the items, their references, prices, quantities and costs.
MANAGE_ORDERS	BUTTON_004	New order button	Allows salesman to create a new order by taking him to the catalogue.
	PANEL_007	Orders overview	Allows salesman to consult details about his latest orders such as its ID, status, date and amount.
CHECKOUT	PANEL_011	Product cart list	Displays the list of products belonging to an order
	PANEL_012	Order information	This panel displays the total price of the order and the client's address
PRODUCT	PANEL_013	Product details	Shows the name and price of the products, as well as its technical specifications.
	PANEL_014	Product stock availability	Shows the stock availability information.

Paths Diagram

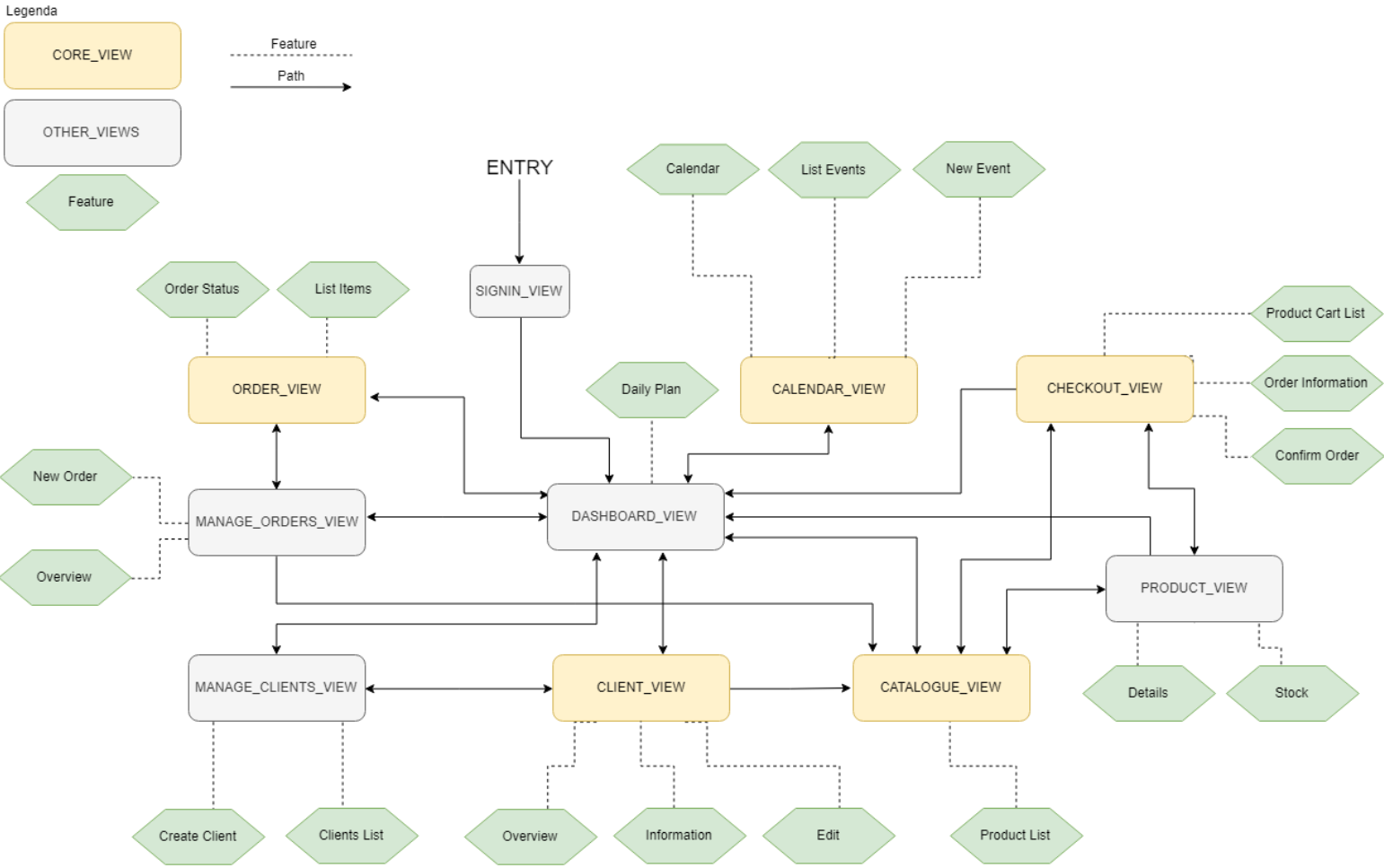


Figure 1: Paths Diagram

Information Architecture (core views)

ID Core View:

CLIENT_VIEW

User and Business Goals

- See and update information about a client.
- Quickly contact a client.
- Track client orders.

Inward Paths/Trigger Words

- View client button in the customers list (CUSTOMERS_VIEW)



Outward Paths/Call to action

- Edit client information
- Contact client (to schedule an appointment, for example)
- Provide information about the client, including personal data, orders status, and notes.
- View catalogue (CATALOGUE_VIEW) with the order associated to this client

Elements of the core

- Client overview - PANEL_003
- Client information, activity and notes - PANEL_004
- Edit client button - BUTTON_002

Figure 2: Core View - Client

ID Core View:

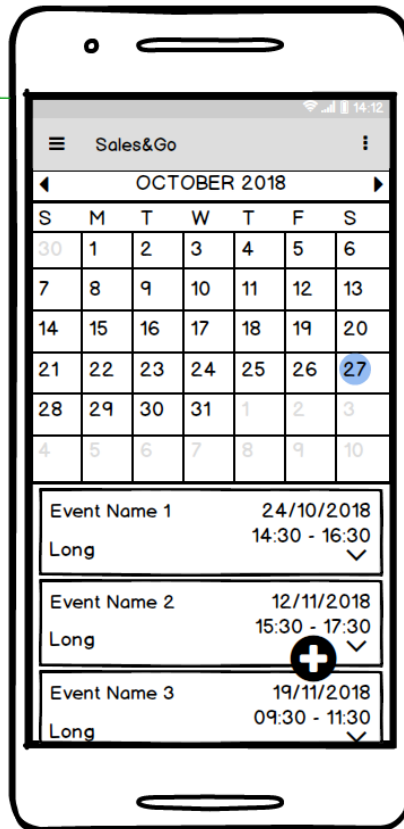
CALENDAR_VIEW

User and Business Goals

- Manage and improve the salesman's schedule

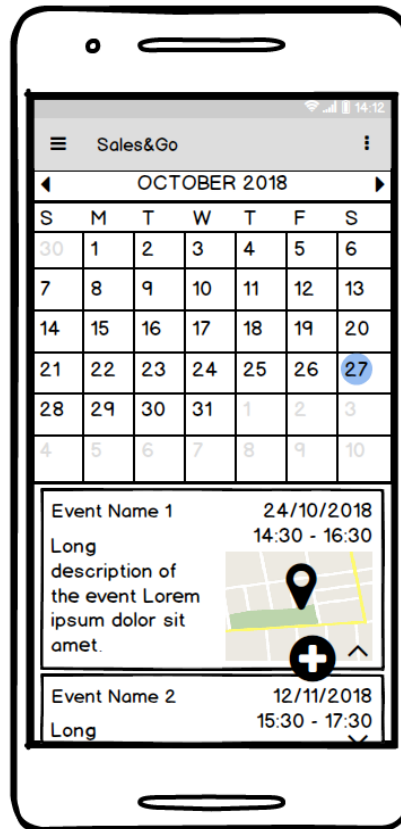
Inward Paths/Trigger Words

- Calendar button in the dashboard (DASHBOARD_VIEW)



Outward Paths/Call to action

- Provide to the user a general view of his schedule
- Add events to the calendar
- Change calendar month
- See more info about an event
- Edit or Delete existing events
- See events on a given day



Elements of the core

- Calendar - PANEL_005
- Events - PANEL_006
- Add event button - BUTTON_003

Figure 3: Core View – Calendar View

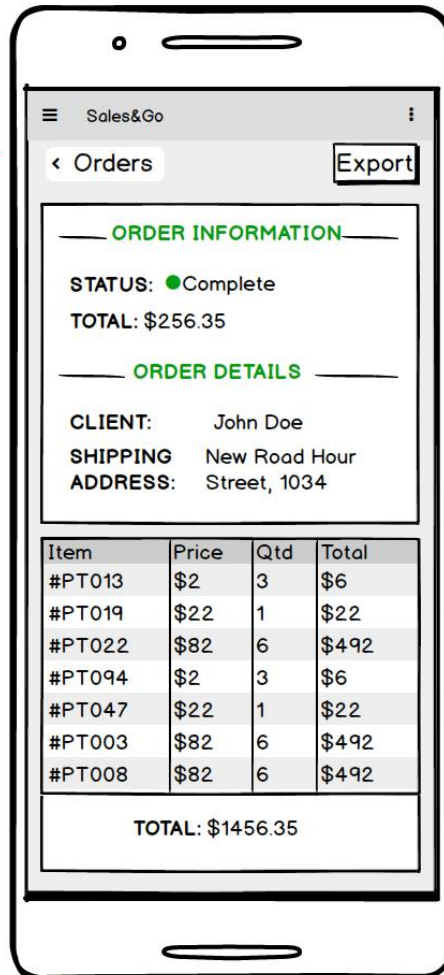
ID Core View:
ORDER_VIEW

User and Business Goals

- See detailed order information.

Inward Paths/Trigger Words

- View order button in the orders list
(ORDERS_VIEW)



Outward Paths/Call to action

- Provide the user a detailed view of an order
- Export order to a printable format (pdf) (invoice)

Elements of the core

- Order status - PANEL_008
- Order items - PANEL_009

Figure 4: Core View – Order View

ID Core View:
CATALOGUE_VIEW

User and Business Goals

- Allow the user to search items and consult an product's general information
- Allow the user to add products to the cart for the client's order

Inward Paths/Trigger Words

- Dashboard's catalogue button
- Client Profile Page
- Orders View



Outward Paths/Call to action

- Product View (PRODUCT_VIEW)
- Provides the user a list of all the available products of the company so he can add them to an order
- Search/filter items by keyword or type and sort by ascending or descending orders
- Checkout View (CHECKOUT_VIEW)

Elements of the core

- Product List - PANEL_010

Figure 5: Core View - Catalogue

ID Core View:
CHECKOUT_VIEW

User and Business Goals

- Overview, edit and confirm an order
- Search and assign a client to an order

Inward Paths/Trigger Words

- Catalogue View (CATALOGUE_VIEW)



Outward Paths/Call to action

- Order View (ORDER_VIEW) after order confirmation
- Product View (PRODUCT_VIEW)
- Change product's quantity
- Assign client to an order

Elements of the core

- Product cart list - PANEL_011
- Order information - PANEL_012

Figure 6: Core View - Checkout

Other Views

ID View:

PRODUCT_VIEW

User and Business Goals

- See detailed information about a product.

Inward Paths/Trigger Words

- Item in the catalogue (CATALOGUE_VIEW)
- Item in the checkout (CHECKOUT_VIEW)

Outward Paths/Call to action

- Add item to an order
- Provide detailed information about the product



Elements of the core

- Product details - PANEL_013
- Product stock availability - PANEL_014

Figure 7: Product View

ID View:

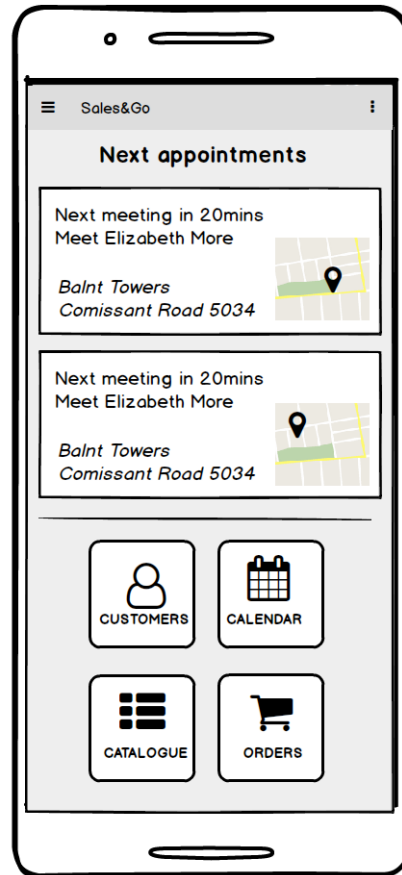
DASHBOARD_VIEW

User and Business Goals

- Agenda overview
- See menu options

Inward Paths/Trigger Words

- Sign-in
- App logo "button"



Outward Paths/Call to action

- Provide the user an overview of his daily planning
- View costumers (MANAGE_CLIENTS_VIEW)
- View calendar (CALENDAR_VIEW)
- View orders (MANAGE_ORDERS_VIEW)
- View catalogue (CATALOGUE_VIEW)
- View notes (NOTES_VIEW)

Elements of the core

- Daily Plan - PANEL_001

Figure 8: Dashboard

ID View:

MANAGE_CLIENTS_VIEW

User and Business Goals

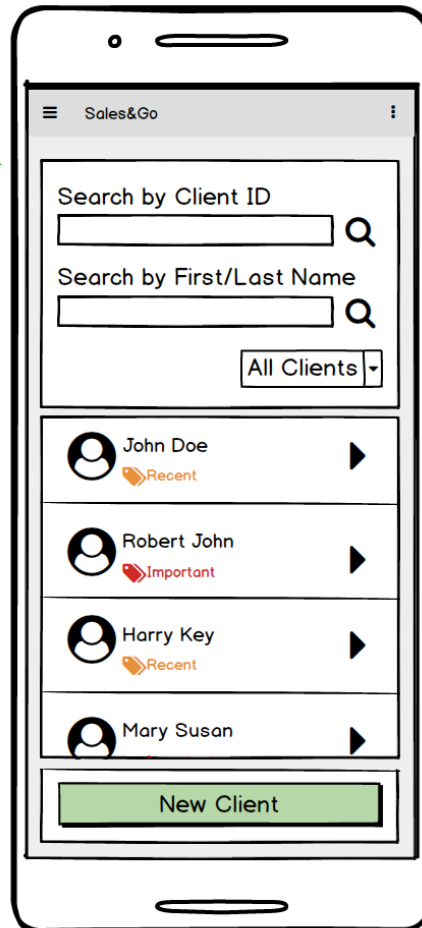
- Clients overview
- Filter and search clients
- Create new clients

Inward Paths/Trigger Words

- Customers button in the dashboard (DASHBOARD_VIEW)
- Back button in a client page (CLIENT_VIEW)

Outward Paths/Call to action

- View client (CLIENT_VIEW)
- List of clients according to the search/filter made
- Create client



Elements of the core

- Create client - BUTTON_001
- Clients list - PANEL_002

Figure 9: Manage Clients

ID View:

MANAGE_ORDERS_VIEW

User and Business Goals

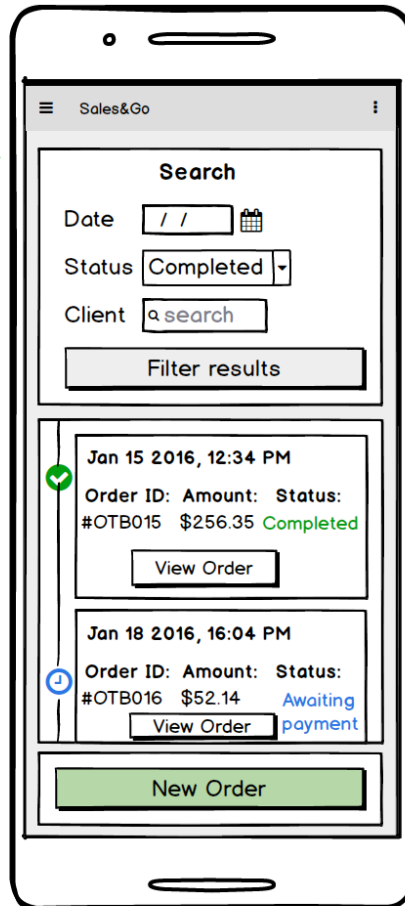
- Orders overview
- Filter and search orders
- Create new orders

Inward Paths/Trigger Words

- Orders button in the dashboard (DASHBOARD_VIEW)
- Back button in a order page (ORDER_VIEW)

Outward Paths/Call to action

- View order (ORDER_VIEW)
- Provide an overview of orders according to the search/filter made
- View catalogue when click on "new order" (CATALOGUE_VIEW)



Elements of the core

- New order button - BUTTON_004
- Orders overview - PANEL_007

Figure 10: Manage Orders

Project Plan - Gantt with tasks

TASK NAME	START DATE	END DATE	START ON DAY*	DURATION* (WORK DAYS)	TEAM MEMBER	PERCENT COMPLETE
Functional Specification						
Theme analysis and architecture	10/24	10/29	0	6	Everyone	100%
Write report	10/25	10/29	1	5	Everyone	100%
Choose frameworks	10/29	10/31	5	3	Everyone	60%
Interoperability (Test w/ ERP) and Prototype Presentation						
Get acquainted with Primavera	11/5	11/9	12	5	Everyone	0%
Set up development environment	11/5	11/9	12	5	Everyone	0%
Integration with Primavera	11/5	11/9	12	5	Everyone	0%
Product development	11/9	11/20	16	12	Everyone	0%
Presentation	11/20	11/23	27	4	Everyone	0%
Development Tasks						
Homepage	10/31	11/15	7	16	David	0%
Sign-in	10/27	11/4	3	9	Diogo	0%
Logout	10/27	11/4	3	9	Diogo	0%
Calendar	11/17	12/5	24	19	Cláudia G	0%
List Events	11/4	11/20	11	17	Cláudia G	0%
New Event	11/1	11/4	8	4	Cláudia G	0%
Client Overview	10/27	11/3	3	8	Cláudia G	0%
Client Information	10/30	11/7	6	9	Maria	0%
Edit Client	11/2	11/15	9	14	Maria	0%
Create Client	11/10	11/14	17	5	Diogo	0%
Clients List	11/11	11/15	18	5	Maria	0%
Product List	11/11	11/20	18	10	David	0%
Order Status	11/25	12/15	32	21	David	0%
List Items	11/25	12/15	32	21	David	0%
New Order	11/25	12/5	32	11	David	0%
Manage Orders Overview	11/25	12/5	32	11	Maria	0%
Product Cart List	11/10	11/17	17	8	Diogo	0%
Order Information	11/17	11/25	24	9	Cláudia R	0%
Confirm Order	11/25	11/25	32	1	Cláudia R	0%
Product Details	10/30	11/10	6	12	Cláudia R	0%
Product Stock Availability	10/30	11/4	6	6	Cláudia R	0%
Final Presentation						
Product development	11/26	12/24	33	29	Everyone	0%
Write report	12/17	12/19	54	3	Everyone	0%
Prepare final presentation	12/19	12/21	56	3	Everyone	0%

Figure 11: Feature Planning 1

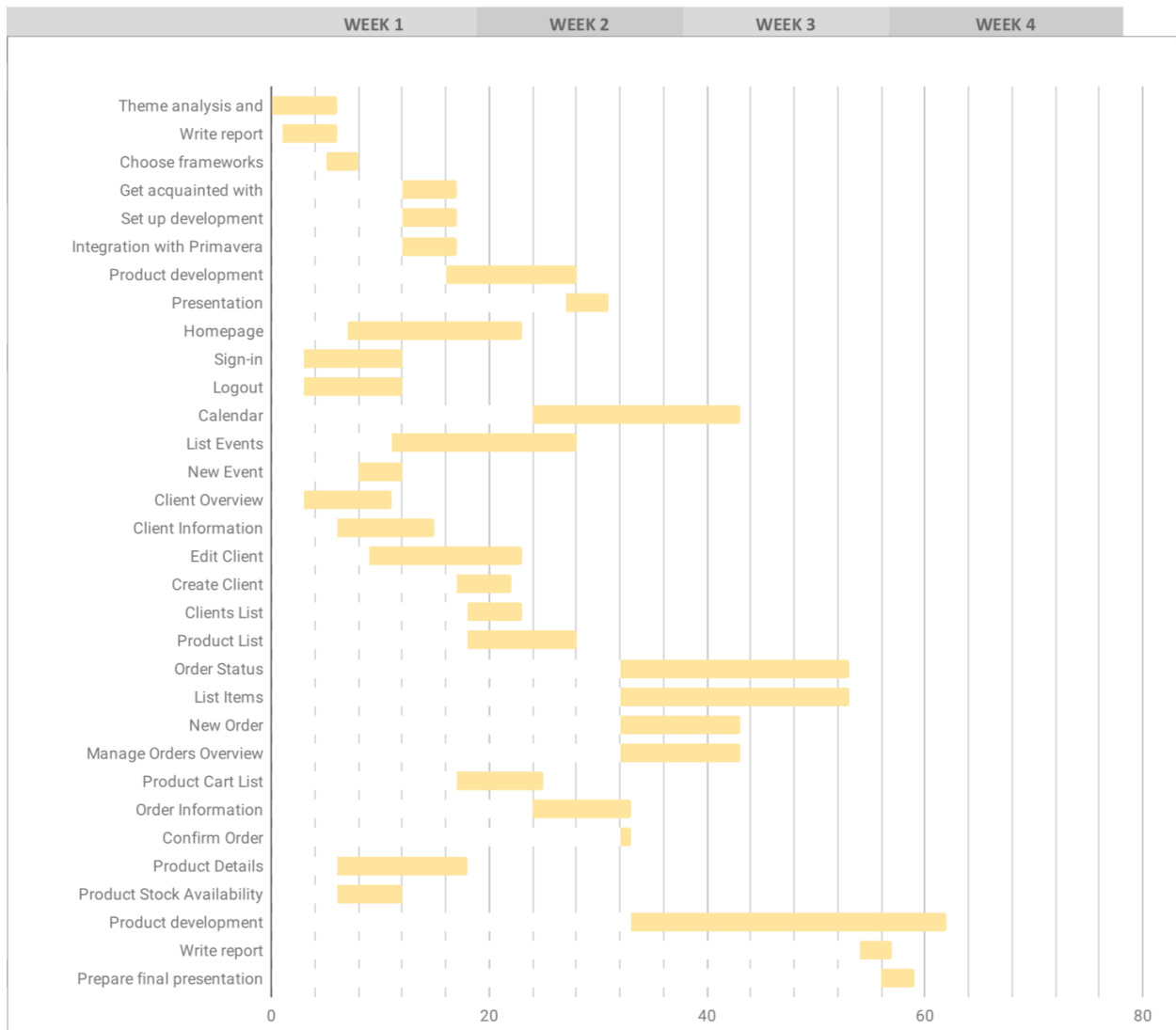


Figure 12: Feature Planning 2