

## **Sales Performance Evaluation System.**

Consider about following scenario:

“Life Backup” is a leading life insurance policy selling company in the country. Their branches spread on entire country. Each branch has sales force consists of minimum one of branch manager, under him minimum one sales supervisor and one cashier and sometime one or more life insurance advisors. Under the supervisor, one or more team leaders and under the team leader one or more sales agents. This each of sales force members has their own responsibilities to accomplished the branch sales targets. Branch sales target or Branch manager sales target totally depend on the branch cumulative or total of sales force targets. Each of sales force member has complete the two type of task such as selling life insurance policies as much they can and collect the policy premium as much as they can.

Branch Manager Responsibilities and Sales Targets.

*Responsibilities*

01) Recruit 2 supervisors for him branch and 3 life insurance advisors for him branch

*Sales Targets per month*

01) No individual sales target but entire branch target is branch manager sales target.

Sales Supervisor Responsibilities and Sales Targets.

*Responsibilities*

01) Recruit 2 Team Leaders for him team and 3 sales agents for him team per month

*Sales Targets*

01) No individual sales targets but him team leaders and sales agent’s total targets is supervisor sales target.

Life Insurance Advisors Responsibilities and Sales Targets.

*Responsibilities*

01) No considerable responsibilities

*Sales Targets*

01) Introduce 5 new life policies per month

02) Collect LKR 750,000 premium collection per month.

Team Leader Responsibilities and Sales Targets

*Responsibilities*

01) Recruit 2 sales agents for him team per month

*Sales Targets*

01) Introduce 3 new life policies per month

02) Collect LKR 500,000 premium collection per month

Sales Agents Responsibilities and Sales Targets

*Responsibilities*

01) No considerable responsibilities

*Sales Targets*

01) Introduce 5 new life policies per month

02) Collect LKR 300,000 premium collection per month

Branch Cashier Responsibilities

### *Responsibilities*

- 01) Enter the premium collection sales invoice details to the system

Sales Invoice has following details.

Description	Example
01) Branch Code	KB-01 (Kesbewa First Banch)
02) Supervisor Code	12379
03) Team Leader Code	27435
04) Sales Agent Code	40360
05) Invoice Date	2024-04-04
06) Policy Number	13459844
07) Premium Amount	LKR 1788.00
08) Payment Frequent	Monthly / Quarter / By Annual / Annual
09) Agent Signature	Yes
10) Cash Handed Over Date	2024-04-05

### **Special Identifications**

- 01) Each sales force member has 5 digits agent code except cashiers.
- 02) Each sales force member promote time to time sales agents to team leader, team leader to supervisor, supervisor to branch manager except cashier.
- 03) Team leader promote to the life insurance advisor if does not belong to him/her to team members.
- 04) Sales force members can resign from him/her post any time.
- 05) Entered policy number does not exist in the current system it considers as new policy number for new life insurance policy.
- 06) Entered sales agent code or team leader code or life insurance advisor code does not exist on the current system it considers as new recruitment from top level.
- 07) Any agent can be change him team according to him requirement.

Sales Performance Evaluation System is web based centralized database application not accepting page redirections. It has mainly three parts.

- 01) One main login to everyone.
- 02) One main dashboard to everyone just view the
  - If sales agent and life insurance advisor can see him sales performance.
  - If team leader can see him team performance.
  - If supervisor can see him team performance.
  - If branch manager can see him branch performance.
- 03) One data entering point for cashier

Performance basically defined as what the percentage completed by monthly target.

Some of wireframe has been given

## Login window

localhost/spes/page.php#login	
<div>Sales Performance Evaluation System</div> <div><div>Agent Code</div><div></div><div>Password</div><div></div><div>Login</div></div>	

## Manager Dashboard

localhost/spes/page.php#manager	
Manager Dashboard Sign Out	Recruit Sales Agents 20 13 (65%)
	Recruit Team Leaders 13 10 (77%)
	Recruit LIA 8 2 (25%)
	Recruit Sales Supervisors 3 1 (34%)
	No Of New Policies 56 40 (71%)
	Total Premium Collection 13 Mn 9.3 Mn (65%)

Customize the others dashboard according to the responsibilities and sales targets.

## Cashier Invoice Data Entering Page

localhost/spes/page.php#cashier			
Cashier Dashboard Sign Out	Invoice Details		
	Branch Code	▼	Supervisor Code
	Team Leader Code	▼	Sales Agent Code
	Invoice Date		Policy Number
	Premium Amount		Payment Frequent
	Agent Signature	▼	Cash Handed Over Date
			Save

**Note:**

If any additional information about this scenario you can inquire by google class room platform.

You are free to design and develop any of additional aspect you need to complete the given tasks.

If you need, you can use Bootstrap (Self Study) and jQuery (Self Study) libraries perform this quickly.

Your web application should perform with HTML, CSS, JavaScript, PHP and AJAX core technologies.

You need to consider about web application browser compatibility too.

Final working web application submit with following core documents.

- 01) Logic design document with minimum of class diagram and flow chart of each function.
- 02) Database design document with minimum of ER diagram and entire database design SQL statements.
- 03) Final source code of alpha version.
- 04) Each function test document with satisfying all logic combinations.

**Special Notice:**

Quick implementation purposes this project implementation divided to two phase

- 01) Phase 01: Make Successful Login System with redirect to correct dashboard windows without page redirecting.
- 02) Phase 02: Entering data and full fill the dashboards statistics in real time updating without page reloading.

Phase 01: This phase contributes 05 marks out of 40 for your assignments.

Phase 02: This phase contributes additional 10 marks out of 40 for your assignments.

Successfully completion of this web application with all the requirements is consider as 40% of completion to the “100 Startups Program” introduce by Mr. D.A.P. Peiris.