CRM System for Sales Management

Requirements Document

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Project Purpose

Development of a crm system that will manage all stages of the sales process as outlined below.

User Roles

1. General Manager
2. Sales person
3. Verification person
4. Clearing person
5. Supplier

Stages of the Sales Cycle

Stage 1: Order Placement

The sales people see the following information on their screen:

- A list of leads
- A list of products
    - The list shall be ordered alphabetically
    - Products which are not in the inventory, shall not be displayed
- General information
    - Conversation script
    - Bank account information for wire transfer
    - Company phone number

The sales person chooses the first lead from the list, calls him and tries to sell products.

If the sale is not successful, the sales person writes a comment in the system. Examples of possible comments:

- Follow up
    - Must contain a specific date and time for the follow up. Once the date and time arrives, this lead shall reappear for the same sales person at the top of his list. If this sales person does not work, the lead will appear to another sales person.
- Wrong number
    - If a lead is found to have a wrong number, his status shall be marked "disqualified" and he will not show up again in the sales people's lists.
- No answer

If the sale is successful, the sales person enters the order details in to the system.

Order details to be entered:
- Products and quantities

- Payment method
  a. Credit card
  b. Wire transfer
  c. Money transfer (Western Union, Moneygram, etc.)
  d. Shipping method
      i. Regular
      ii. DHL
      iii. Messenger

Note that an order can include several packages. Each package includes a single product and quantity.

Once the order details are entered, the order moves to the next stage: if the payment method is credit card, the next stage is verification (stage 2). For other payment methods, the next stage is processing (stage 4).

Stage 2: Verification (relevant only for credit card type payments)

The purpose of this stage is twofold:

- To verify that the sales person did not commit fraud.
- To verify that the customer intended to buy the product and did not do it accidentally.

The verification people see the following information on their screen:

- List of orders waiting to be verified.

The verification person chooses an order from the list, calls the customer, requests the credit card information for billing and enters this information in to the system.

If the order is not verified, the verification person enters a comment in the system saying that there is a mismatch and the order moves back to stage 1 for handling by the sales person who created the order. The sales person can call the customer and modify the order details with updated information.

Stage 3: Clearing (relevant only for credit card type payments)

The clearing people see the following information on their screen:

- List of orders waiting to be verified.

The clearing person tries to charge the credit card that was entered in the system.

If successful, the order moves to the Processing stage.

If unsuccessful, the clearing person shall write a comment saying that the credit card was declined and describe the reason. Then the order shall move back to stage 1 for handling by the sales person who created the order. The sales person can call the customer and modify the order details with updated information.

If a customer was declined twice, he shall be put in a blacklist and the system will not allow him to make another order using credit card payment.

If a customer requests a chargeback after his order was sent, he shall be put in a blacklist and the system will not allow him to make another order using credit card payment.

Stage 4: Processing

There are several types of suppliers. For each product type, there is a different type of supplier.

The suppliers see the following information on their screen:

- List of relevant orders waiting to be processed.

A supplier shall only see orders with products that are relevant to him (products that he can supply).

The supplier chooses an order, packages the goods and transfers the package to a shipping courier. The supplier enters the tracking number in to the system.

Data Input

The General Manager imports the following data into the system:

- Products
- Leads

Products input

Products data shall be inputted to the system using a form. The form shall include the following fields:

- Product name
- List of quantities and prices – a product can be sold only in quantity defined in this list.

Leads import

Leads shall be imported to the system using a csv file. If an imported lead already exists in the system, he will be marked as "double". A lead shall be identified uniquely by his email address and/or phone number.

Tracking

If a customer calls in order to find out the status of his order, the sales person will answer the call, find the order in the system and check the status using the tracking number that was entered.

Note that an order can include several packages. Each package shall have a different tracking number and status.

There will also be a status value for the entire order.

Reports

Product Sales Report

The system shall generate a report that shows quantities sold and revenues per product.

The report shall be segmented according to the following parameters:

- Day
- Month
- Country
- sales person

Sales Person Report

The system shall generate a report that shows quantities sold and revenues per sales person.

The report shall be segmented according to the following parameters:

- Day
- Month

Security

The system shall have a list of approved IP addresses that are allowed to access it. The only person allowed to update this list is the General Manager.

The General Manager shall be allowed to access the system from any IP address using double opt-in. Meaning, he will need to enter password and then confirm his login by email.

A sales person shall receive a new password for his first access. He shall be required to change this password no later than 5 days after receiving it. If he does not change the password, his account shall be locked.

If a person fails to login 3 times consecutively, his account shall be locked.

A locked account can be unlocked by the General Manager only.

A sales person shall be required to changed his password every 30 days.

Additional Requirements

Language

System language is English.