

Sales and Service app for LIFT industry

Sep 26,2021

The scope of this document is to understand the modules and process flow of Sales and Service App with admin software

Document History

Date	Version	Description	Author	Reviewer
Sep 26,2021	1.0	Project Scope	Priyadharshini	Pratheepkumar

1. Purpose

The purpose of this document is to describe the process flow and module details, which will be used to implement the Sales and service app. This document gives a module overview and the implementation decisions taken to achieve the required system operations.

2. Features

- User Friendly
- SMS / Email Integration
- Highly Secured in accessing information over Network, with various user-level accesses.
- Adequate Training to end-users to operate the Software independently.

Key Features:

- Dashboard
- One-click Solution
- Multi Access Control
- Manage Role based-Login Credentials
- Personalized Solution
- High Performance

3. Roles

- Super Admin Management
- Manager
- Supervisor
- Field Employee
- Customer

4. Modules details

Super admin (Web portal)

Master:

- **Company master**

Super admin user can make changes and configure the settings based on requirement. Eg: Email setting, Payment gateway, Visiting charges etc

- **Pin code master**

User can add pincodes based on state and city

- **Route master**

User can create routes and the pin codes will be consolidated in their respective routes. The employees will be assigned under each route. Multiple routes can be mapped for an employee also

- **Employee Master**

User can create employee segmented Designation wise (Manager, Supervisor, Field employee). The management hierarchy will be set in order to execute the given task. The hierarchy follows like Manager, Supervisor and Field employees. The Field employees would be clubbed under Supervisor and Supervisors will be clubbed under manager

- **Service master**

The type of services the admin can serve can be added here, so that customer can understand the services provided and choose the related one from the given to them

- **Customer master**

The list of customers who have been enrolled for AMC will be listed here. They will be provided login for app access. The Pin code will be assigned to them.

Transactions:

- **Sales inquiry**

Super admin user can check the sales inquiries received via app sent by the customers

- **AMC**

Super admin user can create the AMC validity period for the customers

- **Complaints**

Whenever the customer raises complaints (text, voice and image) the super admin can see the complaints list, once the super admin approves the complaint it will be auto assigned to the manager, super visor and employee. The status of completion will be displayed on each progress.

The user can verify the customer AMC details and categories or highlight the AMC expired customer separately

Reports

- **Inquiry Report**

The user can generate report and download in MS Excel/PDF. User can check the assigned inquiries received in a particular day, week, month or year. Date wise "**From and To**" selection aids the user to generate customized reports

- **Complaints Reports**

The user can generate report and download in MS Excel/PDF. User can check the assigned but not completed and completed complaints in detail

- **AMC Alerts**

User can check the AMC details of the customer and filter the active, inactive AMC customers.

- **Payment Report**

Customer can renew AMC online, those Payment details can be fetched based on date selection and download in MS Excel/PDF

Manager & Supervisor (Web portal)

Transactions:

- **Complaints**

Whenever the customer raises complaints (text, voice and image) the respective route Manager and supervisor will receive the complaint. The status will be pending till the work is completed by the employee

Reports

- **Complaints Reports**

The user can generate report and download in MS Excel/PDF. User can check the assigned but not completed and completed complaints in detail

- **AMC Alerts**

User can check the AMC details of the customer and filter the active, inactive AMC customers.

- **Payment Report**

Customer can renew AMC online, those Payment details can be fetched based on date selection and download in MS Excel/PDF

Field Employee App

Transactions:

- **Complaints**

Whenever the customer raises complaints (text, voice and image) the respective route employee will receive notification to his app. He logs in and check the work details and customer details. Once the employee completes the work he can change the status to complete. The status changed will be reflected to the above hierarchy.

Reports

- **Complaints Reports**

The user can check the completed and uncompleted service request and complete history of his service. The user can also check the feedback provided by the customer in **star ratings**

Customer (App)

- **Sales**

This page displays the item variety available in detail for clarifying the customer. Customer can send inquiry about the product

- **Complaint Service Request History**

This page displays the client's previous complaints details. . Date wise "**From and To**" selection aids the user to generate customized reports.

- **About us**

Customer can check the details about the **Jesus Lift company** sales and service. The purpose of the app is described here

- **Terms and conditions**

Customer can check the details about the **Jesus Lift company** term and condition drafted to use the app and limitation in the service before raising any complaints of sales and service. The disclaimer of the app is described here.

- **Service Request**

The customer can raise their complaints by providing the service type, availability date and time and more description about the service.

User can **record voice & share image** about the complaint or service request

- **Status of complaint and feedback**

Once the employee arrive after complaint raised, the user can receive notification on each status via **whatsapp message integrated via API**

The work pending, assigned, and completed will be alerted on each stage to customer for.

- **Feedback sharing**

Customer can provide feedback on each service completed by the employee for the same

Admin Supporting details

- Adding new Service
- Editing any changes in Service / details
- Delete/hide the Service visibility
- Follow on complaints from the beginning of receiving, alert to concerned people for service processing. Update each stage of ordering till completion. The order shipment details will be sent to client for tracking purpose
- AMC tracking
- Payment tracking
- Feedback – Star Rating for each service
- Whatsapp, Email integration
- Push notification
- Reports in required formats

6. Project Costing

Stage	Cost(Rs)	Server Charge
Employee & Customer Android App Admin Portal (super admin, manager, supervisor)	58,000	Rs. 5000 with domain(per year) - Shared server
iOS App for customer	8,000	\$99 per annum for App store

Timeline: 25 working days

Technical aspects:

- UI Designer – Mr. Gopal
- Web software developer – Mr. Janarthanan
- App development – Mr. Mahesh Pandian
- Project Head – Mrs. Priyadharshini

Technology Used:

- Microsoft Visual Studio 2015 - .Net Framework
- Microsoft SQL Server 2012 – Backend DB
- Android Studio – App development

Payment Terms

- Separate 18% of GST will be applicable
- Initial payment would be 50% of total amount.
- Next payment of 25% would be expected once finalize all the features.
- The remaining payment of 25% would be expected at the time of deployment.

Our Bank Account:

Bank Name : IndusInd Bank

IFSC Code : INDB0000117

Account Name : Bigdbiz Solutions Private Limited

Account No : 259884817344

Account Type: Current

In case if you want to pay by gpay: pratheepkumar +91 9884616569

Note

- Domain Name and Server hosting will be separate charge, will share you the bill separately or you can purchase from your end and share the details, we will deploy the code.
- Bigdbiz will utilize their own server till completion of project for testing purpose.
- Separate charges would be applied for SMS based upon the package.