Sales Force Activity Planner

Minor Project

IBM Career Education

Disclaimer

This Software Requirements Specification document is a guideline. The document details all the high level requirements. The document also describes the broad scope of the project. While developing the solution if the developer has a valid point to add more details being within the scope specified then it can be accommodated after consultation with IBM designated Mentor.

INTRODUCTION

The purpose of this document is to define scope and requirements of a Sales Force Activity Planner for a leading Oral Care Company. The Sales employees across the country spend lot of time in planning their daily visits to the prospects. The prospective customers are being referred to as Prospects. These prospects are fed into the system as a backend activity.

The proposed system is targeted to simplify the activity planning process of Sales employees by providing:

1. Quick and easy view of prospects in their territory.
2. Interface to shortlist the prospects for Sales Call.
3. An optimized route to facilitate Sales Calls in a day.

This document is the primary input to the development team to architect the solution the project.

System Users

The Sales Employees shall use the system to plan visits with optimal routes and Administrator will use the system to upload of data from CSVs.

Assumptions

1. In the real world, automation of sales force planning is a mammoth activity. For the scope of current project, we are automating the planning of sales calls for the day, which takes a huge degree of time and collation of data.
2. All the masters will be uploaded as CSV files. These masters are Sales Territory, Areas falling in the Sales Territory, Sales Employees handling these Territories, Routes between Areas in a territory and the Average time taken.
3. Each sales employee covers approximately 6 to 8 prospects in single day. This information will be useful in computing the number of sales calls getting accomplished while deciding the optimal route.
4. New prospects are uploaded every week into the system from the backend. The new prospects will have a status as “New”.
5. The prospects visited earlier with a next action as ‘Re-visit’ are also updated from the backend for this project. In real life, there will be a separate module to update daily visit status.

REQUIREMENTS

The sales employees get to view data applicable to their respective territories.

The list of prospects displayed will be ordered by Follow-up Date, Areas and Status.

Multiple selections of prospects are provided. Optimal route is determined using Average time taken data from Route master and other applicable factors.

Basic System Operations

The system provides the following options to the Sales employee based on the logged in users territory.

1. Plan Sales Calls: The system displays a list of areas falling in the logged in user's territory. User can select a single area, on basis of which the list of prospects (new or to be re-visited) are displayed. A checkbox is available to select multiple prospects for the Sales call. The system records the current date as the planned Sales Call date for the selected prospects.
2. Determine Route - The system determines optimal route by considering the average time taken from Route Master for Areas selected for sales call by the Sales employee. The optimum route is the route that covers all the selected prospects, starting from the office & back, so that it minimizes the total travel time. It also ensures that each prospect location is only visited once.

Apart from these options, the master data is uploaded from the backend as CSV.

Master Updates

The following masters are uploaded in the system using CSV files:

1. Territory Master has a single column named as “Sales Territory”
2. Multiple Areas make up a sales territory, thus the Areas are uploaded as CSV of 2 columns, Area Name. Sales Territory
3. Sales Employee belongs to a Sales Territory, the CSV will have Employee Name, Sales Territory
4. Routes: [Area Name] Source, [Area Name] Destination, Average Time

A weekly update on the prospects is uploaded as CSV. The prospects data will have information like Area Name, Company, Address1, Address2 and Phone Number. The new prospects are assigned ‘New’ Status.

The prospects already visited are updated via backend with a status as “Re-visit” or “Closed”.

DEVELOPMENT ENVIRONMENT

Sales Force Activity Planner will be developed as a web application using Java language. Eclipse will be used as the IDE for the same.