

**Capstone Project Report**

**Report 1 – Project Introduction**

– Ho Chi Minh City, January 2021 –

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# I. Project Report

## 1. Status Report

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Work Item** | **Status** | **Notes (Work Item in Details)** |
| 1 |  | Pending |  |
| 2 |  | In Progress |  |
| 3 |  | Completed |  |

## 2. Team Involvements

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Task** | **Member** | **Notes (Task Details, etc.)** |
| 1 |  | HaPTN |  |
| 2 |  | NguyenLG |  |
| 3 |  | GiaNH |  |

## 3. Issues/Suggestions

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Issue** | **Status** | **Notes (Solution, Suggestion, etc.)** |
| 1 |  | Pending |  |
| 2 |  | In Progress |  |
| 3 |  | Completed |  |

# II. Project Introduction

## 1. Overview

### 1.1 Project Information

* Project name: Sales Management System for Major Education
* Project code: SMSME
* Group name: GSP21SE12
* Software type: Web Application

### 1.2 Project Team

#### a. Supervisor

|  |  |  |  |
| --- | --- | --- | --- |
| **Full Name** | **Email** | **Phone Number** | **Title** |
| Lai Duc Hung | HungLD5@fe.edu.vn | 0976.710.580 | Instructor |

#### b. Team Members

|  |  |  |  |
| --- | --- | --- | --- |
| **Full Name** | **Email** | **Mobile** | **Role** |
| Pham Thi Ngoc Ha | HaPTNSE130460@fpt.edu.vn | 0946.753.053 | Leader |
| Le Gia Nguyen | NguyenLGSE63042@fpt.edu.vn | 0984.272.299 | Member |
| Nguyen Hoang Gia | GiaNHSE63203@fpt.edu.vn | 0799.651.670 | Member |

## 2. Product Background

*[This section summarizes the rationale for the new product. Provide a general description of the history or situation that leads to the recognition that this product should be built. You should also mention here the information on the customer /the people who raise project idea/request]*

Major Education is an educational organization that collaborates with primary schools, secondary schools or high schools in Ho Chi Minh City, in the fields of English, STEM or Abacus Master. All schools in Ho Chi Minh City are considered as Major Education’s customers/partners. Every school year, in the Summer (from June to September), salesmen from Major Education go to those target schools to introduce and sales their programs.

Currently, the Sales Department of Major Education processes all their works manually, from reports collecting, work-plan planning, task assigning, salesmen managing and target schools managing, based on free software such as Microsoft Excel, Google Sheet and shared files via Google Drive cloud.

Therefore, they expect a software that can help them, for both salesmen and sales managers, to automate the existing manual workflow. Simultaneously, through this application, sales managers and administrators will be able to see the overall picture of the company's business process, to know how many schools are cooperating, which schools are in the contracting stage, and which programs that Major Education is providing for each school.

*<<Sample: Employees at the company Process Impact presently spend an average of 65 minutes per day going to the cafeteria to select, purchase, and eat lunch. About 20 minutes of this time is spent walking to and from the cafeteria, selecting their meals, and paying by cash or credit card. When employees go out for lunch, they spend an average of 90 minutes off-site. Some employees phone the cafeteria in advance to order a meal to be ready for them to pick up. Employees don’t always get the selections they want because the cafeteria runs out of certain items. The cafeteria wastes a significant quantity of food that is not purchased and must be thrown away. These same issues apply to breakfast and supper, although far fewer employees use the cafeteria for those meals than for lunch.>>*

## 3. Existing Systems

[Add the system which might help to solve the problems you listed above or the systems in which you can learn/refer the features for your system design]

Nowadays, there are a variety of applications that provide CRM (Customer Relationship Management) solutions for businesses. Major Education suggests our team refer to those softwares to visualize the concept and main features of the future product.

### 3.1 CRMViet

[Write the brief descriptions of the system, the link, the system actors, features, pros, cons, etc.]

CRMViet is a system that provides comprehensive solutions related to CRM for small and medium-sized enterprises (SME) in Vietnam.

*Link:*

* Web application: <https://crmviet.vn/>.
* Mobile application:
  + Android: <https://play.google.com/store/apps/details?id=vn.altalab.app.crmvietpack>.
  + iOS: <https://apps.apple.com/us/app/crmviet/id1197961185>.

*System analysis:*

1. Roles:

* Administrator
* Manager
* Staff
* … (customized roles depends on each company)

1. Platforms:

* Web app
* Mobile app

1. Main features:

* Manage customers
* Support sales and marketing automation
* Manage workflow, tasks, job reminders,…
* Integrated multi-channel
* …

1. Pros:

* A complete and powerful application
* Fulfill all needs of the Major’s Sales Department

1. Cons:

* Many redundant features
* Price is expensive

### 3.2 GetFly

GetFly is a system that provides comprehensive solutions related to CRM for small and medium-sized enterprises (SME) in Vietnam.

*Link:*

* Web application: <https://getfly.vn/>.
* Mobile application:
  + Android: <https://play.google.com/store/apps/details?id=com.getflyvn.crm>.
  + iOS: <https://apps.apple.com/us/app/getflyvn/id1490060413>.

*System analysis:*

1. Roles:

* Administrator
* Manager
* Staff
* … (customized roles depends on each company)

1. Platforms:

* Web app
* Mobile app

1. Main features:

* Manage customers
* Support marketing automation (via SMS, email, or social network)
* Manage departments, sales team,…
* Manage workflow, tasks, KPIs,…
* Integrate modules extension
* …

1. Pros:

* A complete and powerful application
* User-friendly UI
* Fulfill all needs of the Major’s Sales Department

1. Cons:

* Overpowered, many redundant features
* Require monthly payment

### 3.3 EasyEdu

EasyEdu is a system to manage all activities of many departments in an educational organization, especially for language centers. EasyEdu provides solutions for managing finances, expenses, marketing, human resources, class attendance reports, CRM,…

*Link:*

* Web application: <https://easyedu.vn/>.
* Mobile application:
  + Android:

Teacher: <https://play.google.com/store/apps/details?id=com.easyedu.manager&hl=vi>.

Parent/Student: <https://play.google.com/store/apps/details?id=com.easyedu.customer&hl=vi> .

* + iOS:

Teacher: <https://apps.apple.com/vn/app/easy-manager/id1495280190?l=vi>.

Parent/Student: <https://apps.apple.com/vn/app/easy-edu/id1472824752?l=vi> .

*System analysis:*

1. Roles:

* Administrator
* Staff
* Teacher
* Parent/Student

1. Platforms:

* Web app (for all roles)
* Mobile app (one for Teacher and one for Parent/Student)

1. Main features:

* Manage finances, expenses, marketing campaigns, SMS/chats…
* Manage human resources, departments, agencies,…
* Manage customer relationship
* Manage courses, classes, attendances,…
* Manage tasks, schedules,…
* Provide an online learning platform

1. Pros:

* A complete and powerful application
* Good UI

1. Cons:

* Overpowered and too complicated for what the customer (Sales Department of Major Education) really need
* Is a B2C system
* Require payment (monthly or annually)

## 4. Business Opportunity

*[Describe the market opportunity that exists or the business problem that is being solved. Describe the market in which a commercial product will be competing or the environment in which an information system will be used. This may include a brief comparative evaluation of existing products and potential solutions, indicating why the proposed product is attractive. Identify the problems that cannot currently be solved without the product, and how the product fits in with market trends or corporate strategic directions]*

Although the current CRM applications in the market can partially meet the requirements of the business, Major Education still has to pay for many redundant features, which they rarely or would not use. That is why Major Education requests this Sales Management System to specify for their business model. The model of software that we are building is only used for staffs in the Sales Department of Major Education and is not public commercially to the current market. As this Sales Management Software would innovate and improve the effectiveness of Major Education’s manual workflow, so it would save employees’ time and effort to complete their daily tasks as usual.

However, in fact, this software is now building for phase 1 in their sales activity only, has not provided enough features for the whole Major Education’s sales process. It would be upgraded in the next version of this software.

## 5. Software Product Vision

*[Write a concise vision statement that summarizes the purpose and intent of the new product and describes what the world will be like when it includes the product. The vision statement should reflect a balanced view that will satisfy the needs of diverse customers as well as those of the developing organization. It may be somewhat idealistic, but it should be grounded in the realities of existing or anticipated customer markets, enterprise architectures, organizational strategic directions, and cost and resource limitations]*

The target users that SMSME aims to are salesmen and sales managers of the Sales Department of Major Education.

For salesmen, this software would help them manage their work-plan as well as their tasks easier and more visually, submit daily reports more directly and they can also monitor other salesmen’s works.

For sales managers, they would not have to collect and analyze all salesmen’s reports manually. Now they can supervise salesmen or search for contract history more easily. Moreover, they can see the overall picture of the company's business process, including what schools are lead customers, who are the most effective salesmen,…

## 6. Project Scope & Limitations

*[The project scope defines the concept and range of the proposed solution. It’s also important to define what will not be included in the product. Clarifying the scope and limitations helps to establish realistic expectations of the many stakeholders. It also provides a reference frame against which proposed features and requirements changes can be evaluated. Proposed requirements that are out of scope for the envisioned product must be rejected, unless they are so beneficial that the scope should be enlarged to accommodate them (with accompanying changes in budget, schedule, and/or resources)]*

### 6.1 Major Features

*[Include a numbered list of the major features of the new product, emphasizing those features that distinguish it from previous or competing products. Specific user requirements and functional requirements may be traced back to these features.]*

FE-01: Sales Manager can manage target schools.

FE-02: Sales Manager can assign salesmen to target schools.

FE-03: Sales Manager can supervise salesmen.

FE-04: Sales Manager and Salesman can track tasks’ progress (list of assigned schools).

FE-05: Sales Manager and Salesman can manage their daily reports.

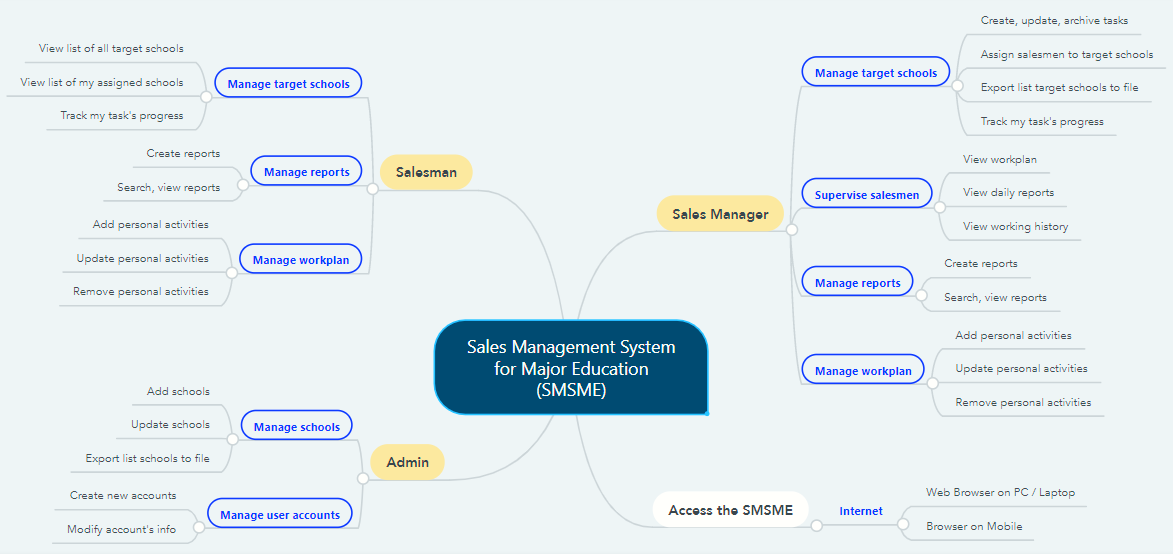
FE-06: Sales Manager and Salesman can manage their work-plan.

FE-07: Sales Manager and Salesman can view target schools, work-plan and daily reports of each other.

FE-08: Sales Manager and Salesman can view history of schools’ reports.

FE-09: Administrator can manage user accounts.

FE-10: Administrator can manage all schools.



*Figure 1. Major Features*

<<Sample:

FE-01: Order and pay for meals from the cafeteria menu to be picked up or delivered.

FE-02: Order and pay for meals from local restaurants to be delivered.

FE-03: Create, view, modify, and cancel meal subscriptions for standing or recurring meal orders, or daily special meals.

FE-04: Create, view, modify, delete, and archive cafeteria menus.

FE-05: View ingredient lists and nutritional information for cafeteria menu items.

FE-06: Provide system access through the corporate intranet, smartphone, tablet, and outside Internet access by authorized employees



>>

### 6.2 Limitations & Exclusions

*[Identify any product features or characteristics that a stakeholder might anticipate, but which are not planned to be included in the new product.]*

LI-1: The SMSME now shall be used only for phase 1 (sales phase: from June to September) of the Sales Department in Major Education.

LI-2: All schools in the database now are only located in Ho Chi Minh city.

LI-3: The SMSME has not supported a Mobile application for role Salesman and Sales Manager. SMSME now is a responsive Web application.

LI-4: The SMSME has not supported a feature that can track the working history of a school’s representative/principle.

<<Sample:

LI-1: Some food items that are available from the cafeteria will not be suitable for delivery, so the menus available to patrons of the COS must be a subset of the full cafeteria menus.

LI-2: The COS shall be used only for the cafeteria at the Process Impact campus in Clackamas, Oregon.

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