

Requirement List

New Client

Objective

To track and automate the order & sales management of an Medical equipment distribution company and to increase the level of accessibility to their customers, and to reduce the manual work done by the executives, Collection of customer information in one place, With an cost effective tool.

S. No	Module	Requirement	Remarks
1	Masters	Product Creation	
2	Masters	Customer Creation	
3	Planning	Monthwise plan & approval manager	Date wise plan for the entire month
4	Planning	Daywise route plan	
5	Planning	Daywise plan change approval from manager	In case of plan change, manger approve Option to select Multiple route on a same day
6	Planning	Any deviation in Daywise plan highlight	
7	Campaign Management	Campaign Budget	As a separate module
8	Expense Management	Allowance	Allownace applied for each executive, additional allowance to be captured
9	Expense Management	Other expense - Limit fix	Fix limit for each Expencc category
10	Expense Management	Expense claim by Sales person against budget	
11	Customer Management	Customer category based on Sales volume	Categorization of Customer based on Sales volume
12	Order Management	Customer visit	
13	Order Management	Order based on different category	
14		Invoice Generatio	
15	Report & MIS	Sales till date	
16	Collection Management	Collected till date	
17	Collection Management	Balance	
18	Collection Management	Pending issues	Capturing and track customer complaints
19	Customer Management	Customer History	Customer visit history 1. Total Sales 2. Total Collection 3. Pending Payment 4. Total Visit (& More in Pop up)
20	Sales force tracking	GPS tracker	To check options to plot line continously