# BUSINESS REQUIREMENT DOCUMENT

Preparing a Login panel for multiple People. With 5 Seniors and 10 Sales people. Software to be developed for 9 Important Modules.

1. **Marketing Module**
2. **Employees Module with Tracking**
3. **Internal Server Data base Storage**
4. **Email Module**
5. **Region Wise Population**
6. **Coding as per Product and City**
7. **Coding as Per Industry**
8. <span style="color:red">**Other Details as per the BRD provided in Excel format**</span>
9. <span style="color:red">**Exctract data from Tally Excel File**</span>

**Features Required**

1. Login with password for Employees. Additional Employees account can be created whenever required.

   **A) MARKETING MODULE**

2. Create Dash board showing Graphical Presentations with Monthly Estimated Sales Prediction Amount which Sales People will be putting as "Expected Sales for the Month".

   a. Actual Sales Volume
   b. Expected Sales
   c. No Clients Visited
   d. No of Clients Expected
   e. Email sent, opened, Unmailed Data etc
   f. No of Leads from Sales
   g. No of Leads from marketing
   h. Provide Notifications of Leads entered by Sales people and Show the Leads in bucket from Sales to Marketing.
   i. Provide Leads Assigning Rights feature

3. **Mass Emailing** and Mass Whatsapp messaging in data stored in Software.
   a. Generating Reports of Un-mailed Numbers, Emailed Nos, Bounces Mails, Mails opened.

4. Report Generation
   a. Marketing Reports
   b. Sales Reports
   c. Pratiksha Marketing Head Reports
   d. Monthly, Quarterly and Annual Sales and Customer Reports

5. Show Number of meetings of Sales person for the Day on Dashboard

6. Sales Report to be filled on the same date. Next Day report filled to be marked in Red.

**B) Employee Details Module**

7. Data base creation of Employees, clients, Places visited.

8. Provide Working hours of Login and Logout which can be accessed By HR for during Salary Calculations.

9. Google tracking location for employees for location detection in Punch in and Punch out. Location to be stored in backend for future analysis.
    a. History of Employees visits record
    b. Time calculations of hours worked, Visited and location tracking.
10. Create Calendar for events and important notifications.

11. Upload documents for leaves or other Medical purpose to submit to management.

12. Apply Leaves feature with Authentication and approval from Department.

13. Create List of Employees of Company in backend with details
    a. Name
    b. Address
    c. Contact
    d. Email ID
    e. Aadhar No
    f. PAN no
    g. Offer Letter Date
    h. Date of Joining
    i. Employee ID
    j. Type of Employment – Full time,Part time
    k. Work Location
    l. Reporting Manager
    m. Date of Exit

14. Store All the Database on Local Server where all Sales and Other Employees can login and Download the Data like Brochures, Files, Documents etc.

15. Monthly Reporting Pattern with the required Departments As Sales and Marketing.

16. Sales People to have a Plan of Action field to be entered in their account login.

17. Create Companies List during Form Filling.

18. Set Reminder Notifications for Future Meetings scheduled by Sales Person

19. Add Schedule and TASKS

20. Outstanding amount from Tally to be extracted. Excel file will be downloaded and uploaded in CRM so points will be shown.

21. Customer wise advance, Outstanding and Payment schedule Outstanding from Excel. Rest Manual

22. Expected , Achieved and balance for employees target amount.

23. Tender Form format to be filled directly in Software. 2 Pages form.

24. **Business Plan as per products** – As per excel provided

1. Total number of visits to a particular customer to be marked out as how many times Sales person **went** to that customer.

2. **Total No of Emails sent and Received** to a Particular customer to be shown in the System.

3. If other mail received from other domains like **Gmail, Hotmail**, then these mails to be marked as **Unallocated mail**. And These to be directed by the employee to the respective **company folder**. If Employee doesn't do that then a mail should be triggered to Senior manager that Mail has not been allocated and Total no of unallocated mails to be shown in the bucket list.

4. Customer Information Form details to be received. Customer to get a **Unique ID No or code** accordingly the customer will be identified. This code to be generated **automatically** in the software.

5. Company or client names to be added according to the **State or the city** and accordingly the **Unique ID code** to be generated for the client.

6. Additional employee logins to be added internally when **new** company **member joins** in the company.

7. **Email Tracking** - Data can be **downloaded** only once logged in Via System(Our Software). But Since it is G-Suite. Once the file has been mailed then it wont be secured as the other person can download the file from Any where.
   **Email Integration Features will include following Features**.

   a. Email Tracking as to whom and when it was sent asper the Client name.
   b. Data Can be accessed and Attached in Mail only when logged in via Dimple Chem Software.
   c. One ID and password for Software Login. And for **Data Access** to download or upload or to see, again **one more Password** will be required.
   d. G-Suite mail integration.
   e. Data on server Access can be given to only **selected Employees** and so they wont be able to access or attach file from Server in their mail. **Rights for access** will be given by **senior management.**

**MAKE GSUIT ONLY POSSIBLE THINGS**