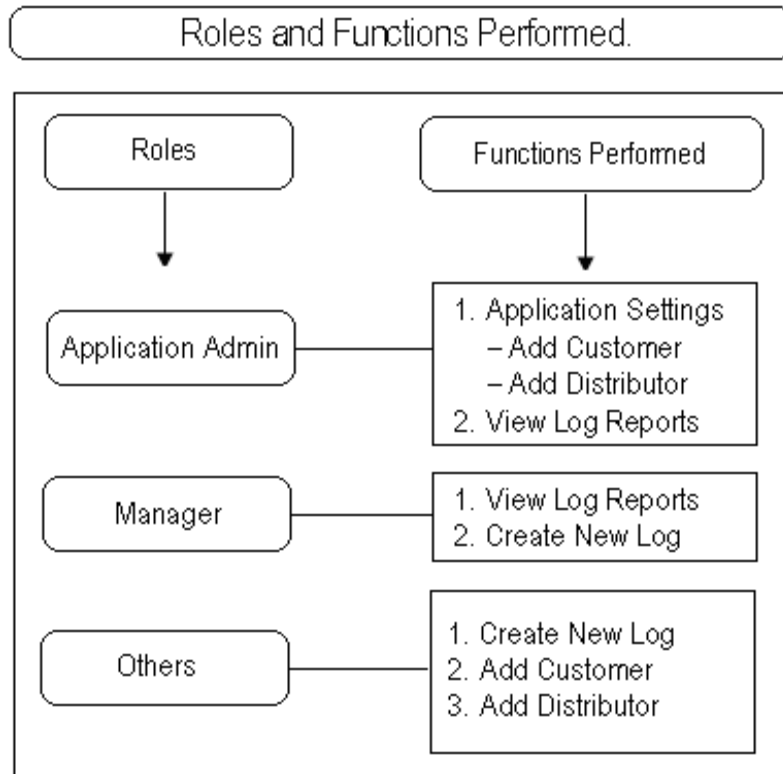


SALES TRACKING SYSTEM

The Sales tracking system aims at supporting the Sales Administrator to keep a track of the customer and distributor details and their follow-up. Any Sales person in the organization will be able to add the details of the respective customer and the distributor and then can retrieve the follow-up information whenever required.

The basic roles and functions of the Application admin and the Manager can be shown as below-



As can be seen from the above diagram, there are 2 basic roles –

1. Application Admin – Can add / edit the Customer and Distributor names and can view log reports.
2. Manager – Can view Log reports and can create log reports.

All others except the ones with the above mentioned roles can create new log reports and also can add customer / distributor names to the respective list. All the log reports created by self can be seen in the “My Log Details” option in the left navigator categorized as “All Requests” and “Saved as Draft”.

The general view of the application can be shown as below –

The first image shows the log requests arranged categorically “By Date”. The second image shows the log requests by the customer name.

The new log request can be created by selecting the “New Log” option in the left navigator. After it is done, the requestor needs to click on the “Create Log” button which will open the request form which looks like shown below -

The screenshot shows a Lotus Notes window titled "Lotus Notes" with a close button in the top right corner. The main content area is a form titled "CUSTOMER DETAILS". The form has the following fields and controls:

- Customer Name ***: A dropdown menu.
- Status**: A text input field.
- Start Date**: A date picker showing "16".
- Distributor Name**: A dropdown menu.
- Accompanied by**: A dropdown menu.
- Priority**: Radio buttons for "Yes" (selected) and "No".
- Objective**: A text input field.
- Result**: A text input field.
- NextFeed Back**: A text input field.
- Follow-Up**: Radio buttons for "Yes" (selected) and "No".
- Follow-Up Date**: A date picker showing "16".
- Follow-Up Comments**: A text input field.

At the bottom of the form are three buttons: "Save", "Save As Draft", and "Close".

The requestor should fill in the required fields to save the request. The mandatory fields are –

1. Customer Name
2. Distributor Name
3. Status
4. Accompanied by

The customer and distributor names should be selected from the drop down box. After saving the log request, the Manager and Application Admin can view the requests in the “Log Reports” option in the left navigator. However, to save the request as draft, only Customer Name is mandatory and the request is visible only to the one who created it.

In case the requestor needs to add new Customer or Distributor names to the list, he may click on the “New Customer” and “New Distributor” which will open the dialog boxes which look as shown below. He can now add the names and click on “Save” to save them. Now, while creating the log request, he will nbe able to see the new names in the respective drop down menus.

Log reports can be viewed on the basis of various categories as following –

1. By Employee Name
2. By Priority
3. By Customer
4. By Distributor
5. By Date

The requests categorized based on the priority looks like shown below –

Priority	Username	Customer Name	Distributor	Status	Accompanied By
High					
	Rasika Khaladkar	Godrej Plant 007	Janata Agencies	Exist	Sapna Gugale / Pallavi Jagtap / Vrushal Bauskar
	Sapna Gugale	Godrej - Plant 9	Chem Fab Engineers	Exist	Niky Shah/ivisoft
	Sapna Gugale	New Customer	Lubritech Engineering	Pending	Niky Shah/ivisoft
Low					
	Vrushal Bauskar	Test Customer	Janata Agencies	Exist	Vrushal Bauskar/ivisoft