DOCUMENTATION 0N CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

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INTRODUCTION

DEFINITION

Customer Relationship Management (**CRM**) is an approach to managing a company's interaction with current and potential customers. It uses data analysis about customer's history with a company to improve business relationships with customers, specifically focusing on customer relations and ultimately driving growth.

Customer Relationship Management (CRM) in a very broad way can be defined as the efforts made towards creating, developing, and maintaining a healthy and long-lasting relationship with the customers using technology.

PIPELINE

A sales pipeline is an organized, visual way of tracking multiple potential buyers as they progress through different stages in the purchasing process.

Often, pipelines are visualized as a horizontal bar, sometimes as a funnel, divided into the stages of a company's sales process. Potential buyers are moved from one stage to the next as they move through the sales process: when contact is made.

The stages included in the system are as follows:

1. **Lead**: A lead is someone who appears similar in profile to your target customer; you may decide that they are worth pursuing. Track your most fruitful sources of leads (that is, leads that become customers).
2. **Prospect**: A prospect has confirmed interest in your offering. You have had a conversation, provided the person with information about what you do, and both of you have agreed to a next step in the sales process.
3. **Qualified Prospect**: Qualification is the most critical and demanding stage of the sales funnel. In the qualification process, you verify that the prospect has a need for your product, that the prospect sees value in your offering, that there is sufficient budget for a deal, that you have access to the decision-maker, and that there is an agreed-upon timeline for the sales process. The qualification process can be complex and lengthy.
4. **Committed**: When a customer has agreed to move forward with a deal, they are "committed" (also known as "verbal commitment" or "verbal"). What remains is to work out the details of the contract, delivery and payment, all of which have the potential to "undo" the

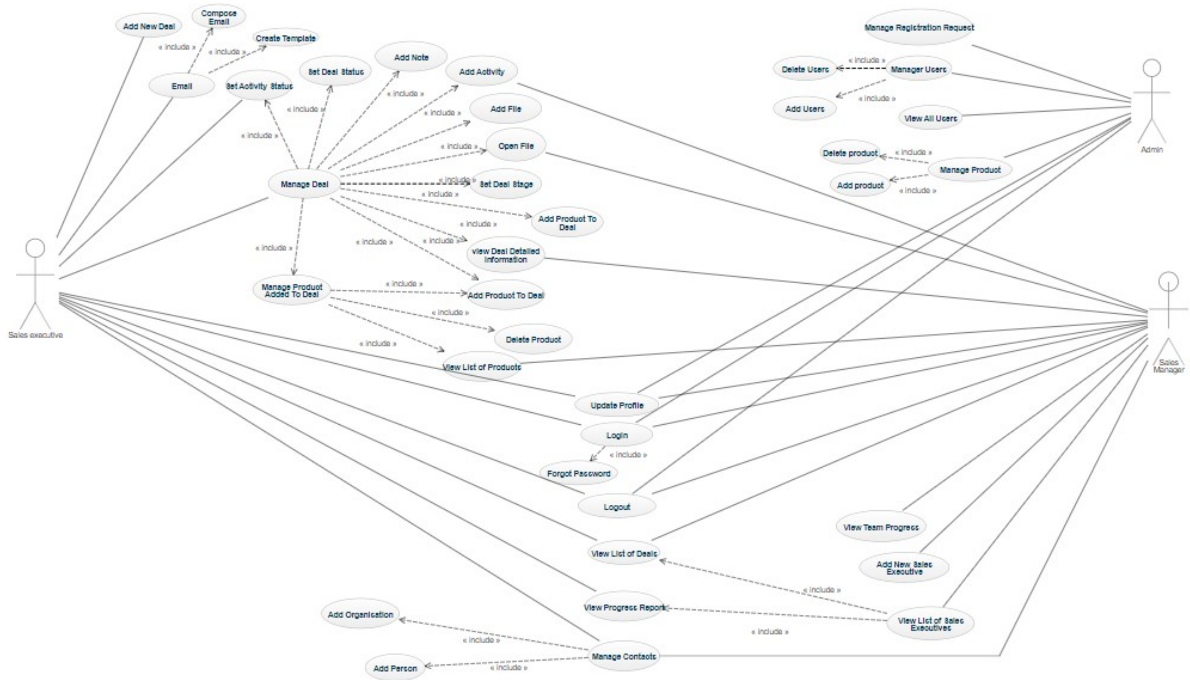
certain terms being met.

5. **Transacted**: A sale has transpired when a contract is signed by both parties. From a salesperson's perspective, the fulfilment of the contract is the responsibility of other parts of the organization, and the salesperson can now focus on the next opportunity. In the case of early-stage start-ups, however, frequently the person that sells is also involved in fulfilling the contract. A signed contract can be booked as revenue from an accounting perspective.

USE CASE

DIAGRAM

Fig. Use Case for CRM



EXPLANATION

Customer Relationship management includes 3 types of actors:

1. Admin
2. Sales Executive
3. Sales Manager

- Login and Logout: Every actor specified in the system such as the admin, sales executive, and the sales manager has to log in to the system and log out of the system. They have to use email id and password from which they can log in to the system and perform functions and then log out the system. (Refer – [A] LOGIN and FORGOT PASSWORD - 1. Login and Logout)

- Forgot Password: If the user has forgotten the password then they can click on forgot password and set a new password then login again using the new password. (Refer - [A] LOGIN and FORGOT PASSWORD - 2. Forgot Password)
- Update Profile: All actors can update their mobile number, profile picture, and password using 'update profile' functionality. (Refer - [E] Update User Profile)

Roles Explanation

1. ADMIN: Admin is the person who sees the functionality that is all the functions of the system work properly or not. Admin can manage users and products.
   The functions of the Admin are as follows (Refer - [B] ADMIN):
   A. Manages Users: Add and delete system users.(Refer - [B] ADMIN – 1.2 Add New User and 1.3 Delete Users)
   B. Manage Registration Request: Admin can accept or reject the request by the Sales Manager to add a new user (Sales Executive). (Refer - [B] ADMIN – 1.3View All Users Registration Requests and 1.4View User Registration Request)
   C. View Users: Admin can view a list of detailed information about the users of the system. (Refer - [B] ADMIN – 1Main Page for Admin)
   D. Manage Product: The admin can add or delete the products if required.(Refer - [B] ADMIN – 1.5 Manage Products)

2. Sales Manager: The sales manager manages the sales executive,i.e., who checks the work of the sales executive if they are working properly or not.
   The functions of the Sales Manager are as follows (Refer - [C] SALES MANAGER):
   A. View team progress: Sales Manager can view the team progress report of all sales executives in their team, for example- what is the average deal size, Conversion rates, deals won and lost, etc.(Refer - [C] SALES MANAGER– 1.Main Page for Sales Manager)
   B. Add new sales executive: Sales manager can fill new sales executive details add request it to the admin.(Refer - [C] SALES MANAGER – 1.2aAdd New Executive)
   C. View list of sales executives: The Sales Manager can view all sales executive details. (Refer - [C] SALES MANAGER – 1.2View Sales Executive)

D. View Deals: The Sales Manager can view a list of all deals that the sales executives have won, lost and ongoing deals in their pipeline.(Refer - [C] SALES MANAGER – 1.2cView Selected User Deals)
E. Add Activity: The Sales Manager can assign a task/an activity for a specific deal of a sales executive. (Refer - [C] SALES MANAGER – 1.2dAssign New Task)
F. View Detailed Deal Information: The Sales Manager can click on a deal to view detailed deal information.(Refer - [C] SALES MANAGER – 1.2View Selected User Deals)
G. View Progress Report of Sales Executive: The Sales Manager can view the progress report of a Sales Executive.(Refer - [C] SALES MANAGER – 1.2bView Selected User Progress Report)
H. Open File: The Sales manager can view a file added to a deal of sales executives. (Refer - [C] SALES MANAGER – 1.2fView File)
I. View Product List: The Sales manager can view a list of products added to a deal of sales executives. (Refer - [C] SALES MANAGER – 1.2gView Added Products)
J. Manage contacts: There are two types of contacts that the sales executive can manage- 1. Contacts for people 2. Contacts for an organization. (Refer - [C] SALES MANAGER – 1.3Manage Contacts)

3. SALES EXECUTIVE: The person who interacts with the customers (typically a Feet-On-Street or a telecaller).They perform different types of functions in the system to get smooth working.
The functions of the Sales Executive are as follows (Refer - [D] SALES EXECUTIVE):
A. Add deals: The Sales Executive can add an opportunity/ deal which will contain the value of the deal and client information. (Refer - [D] SALES EXECUTIVE – 1.2Add New Deal)
B. Manage Deal: The Sales Executive can view detailed deal information, add activity [calls, email, meetings, and schedule activity, add a note for activity], add notes, add a file, add a product to a deal, manage the products added to deal [edit and delete], etc.(Refer - [D] SALES EXECUTIVE – 1.3View Deal Information and 1.3a to 1.3j)
C. View list of deals: The Sales Executive can view a list of deals added at each pipeline stage. (Kanban View) (Refer - [D] SALES EXECUTIVE – 1. Main Page for Sales Executive)
D. Set Activity Status: The Sales Executive can set activity status as marked as done for an upcoming activity after the completion of the activity. (Refer - [D] SALES EXECUTIVE –

1.3iSet Activity Status,1.4 Set Activity Status Directly, 1.5 and 1.3k Complete Activity)

E. Manage contacts: There are two types of contacts that the sales executive can manage- 1. Contacts for people 2. Contacts for an organization.(Refer - [D] SALES EXECUTIVE – 1.8 Manage Contacts)
F. View Progress Report: The Sales Executive can view their progress report.(Refer - [D] SALES EXECUTIVE – 1.7View Progress Report)
G. Email (Compose Email and Create Template): The sales Executive can compose the email or choose a template. The user can also create new templates.(Refer - [D] SALES EXECUTIVE – 1.6Email Subproject)

XSEMBLE FLOW AND WIREFRAMES

The system includes 3 types of actors/users included in this system – Admin, Sales Manager and Sales Executive which plays a vital role in the system.

The flow of system goes as follows:

[A]LOGIN and FORGOT PASSWORD

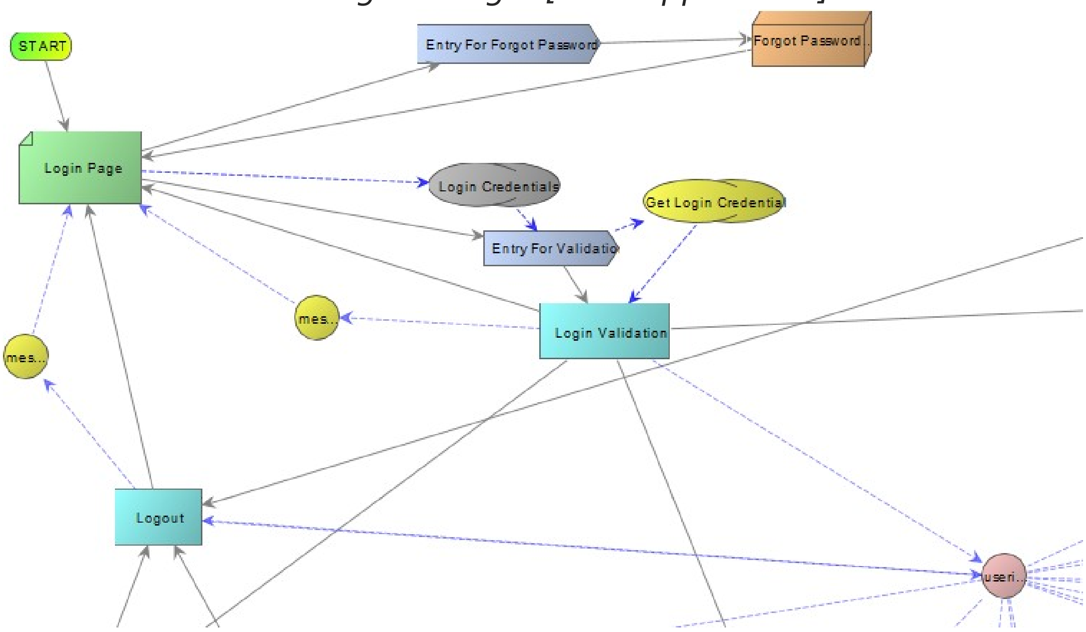
1. Login and Logout

1. Wireframe

Fig 1.1Login Page [CRM.Application]

2. Screenshot of Flow

Fig 2.1 Login [CRM Application]



3. Explanation

In the login page, all the users such as Admin, Sales Executive, and the Sales Manager can log in into the system using their login credentials, i.e., their registered Email id and Password. If the entered Email Id and Password are valid then it will go to the main page based on the user's type otherwise, it will display an error message.

In the Xsemble flow, the flow starts with the start node, from start node it goes to the 'Login Page' and the users can enter the user credentials using data node. The user credentials are validated using the 'Login validation' method which then creates a session variable if the user credentials are valid (Note – session variables are used throughout the system and given to all methods that will use any database). From the method, the flow can go to any 'Main Page' based on the user's role.

The Logout method will log out the user when they click on the logout button on their Main Page and the control will go back to login page. The Logout method will also update and close the session, i.e., ‘userinfo’ session data node.

The Login Page performs the following actions:

- Sign In– By Clicking ‘Sign In’ button, the user credentials are validated then it will lead to appropriate main page.
- Forgot Password – By Clicking ‘Forgot Password?’ link. (Refer – 2.Forgot Password)

2. Forgot Password

1. Wireframe

Fig 1.1 Forgot Password Page [CRM.Forgot_Password]

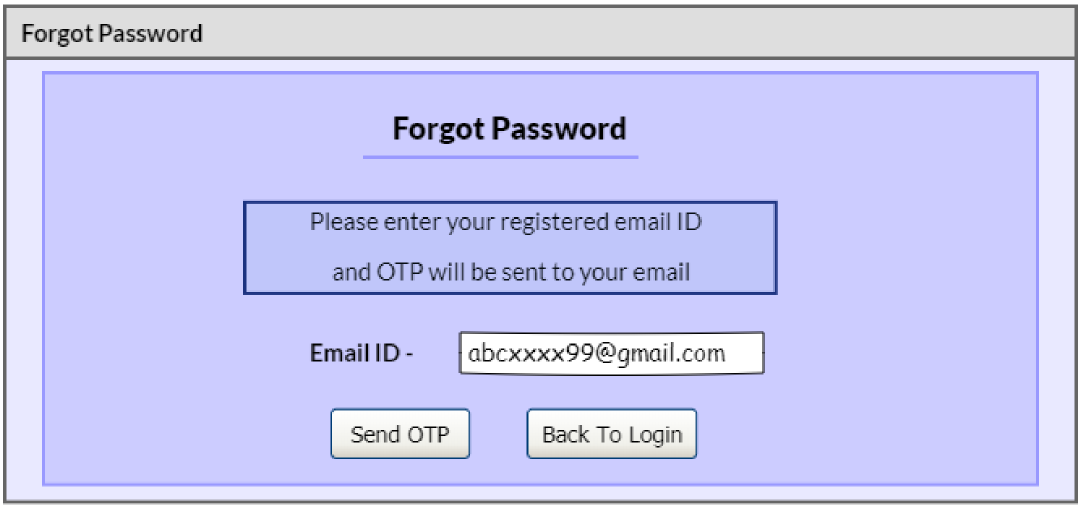
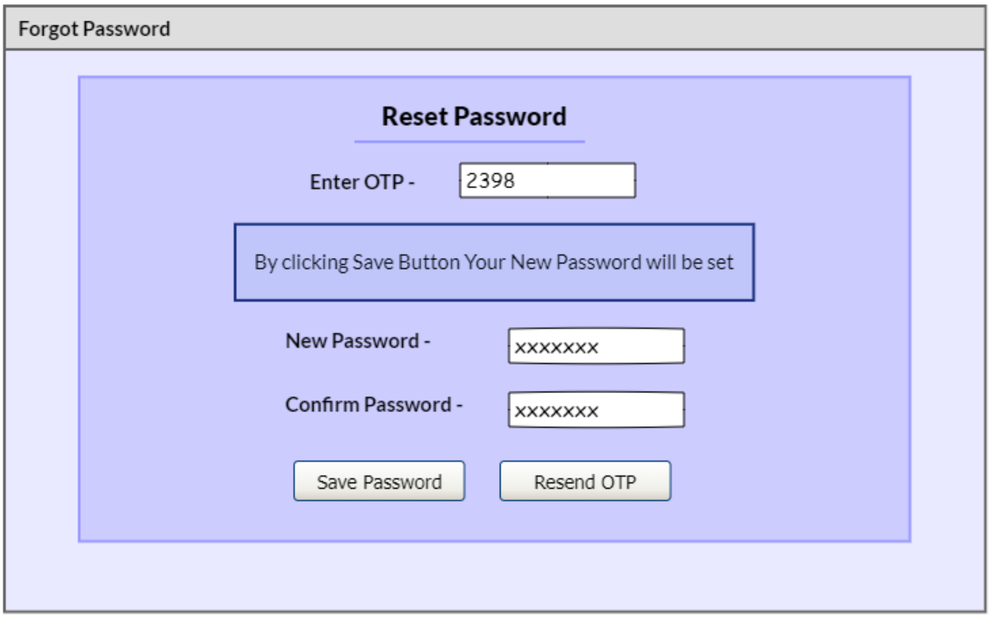


Fig 1.2 Reset Password Page [CRM.Forgot_Password]



2. Screenshot of Flow

Fig 2.1 Forgot Password Subsystem [CRM.Application]

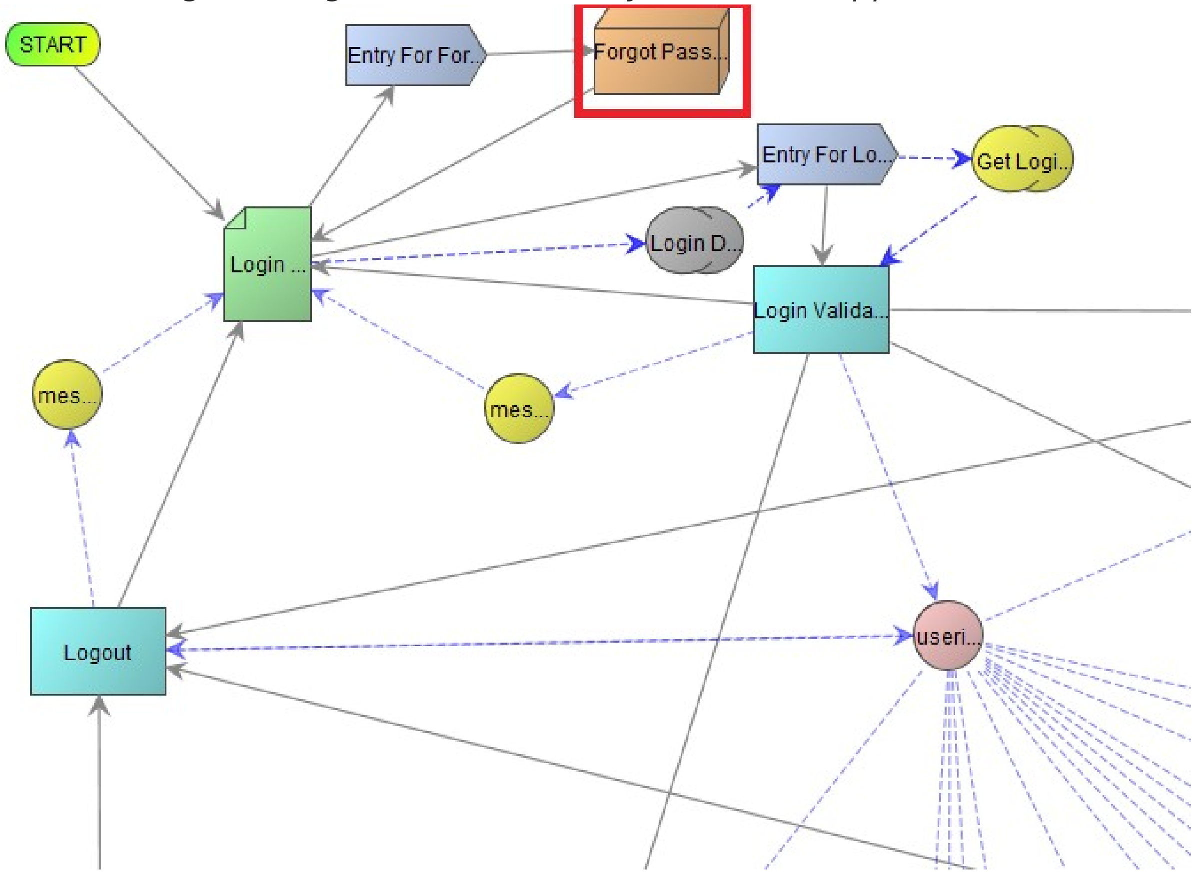
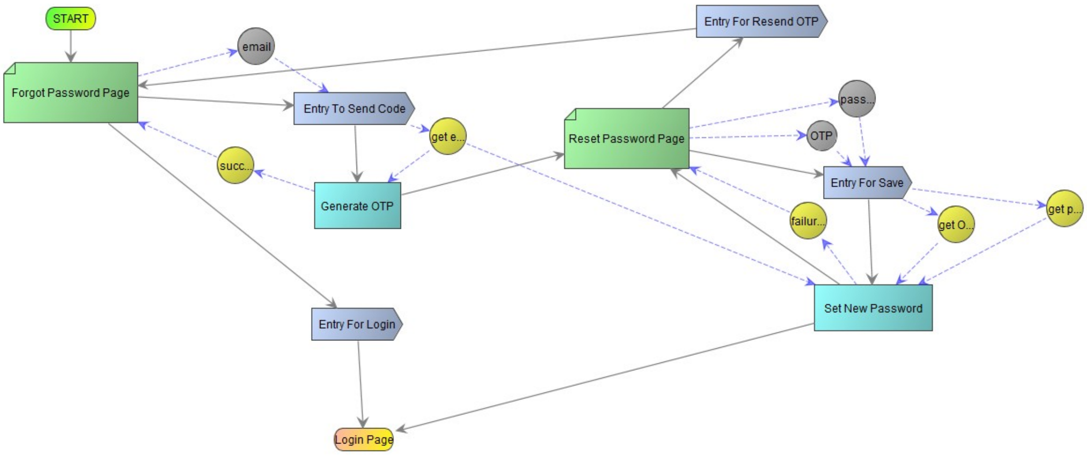


Fig 2.2 Forgot Password [CRM.Forgot_Password]



3. Explanation

The Forgot Password Subsystem [in CRM.Application] is linked to CRM.Forgot_Password.

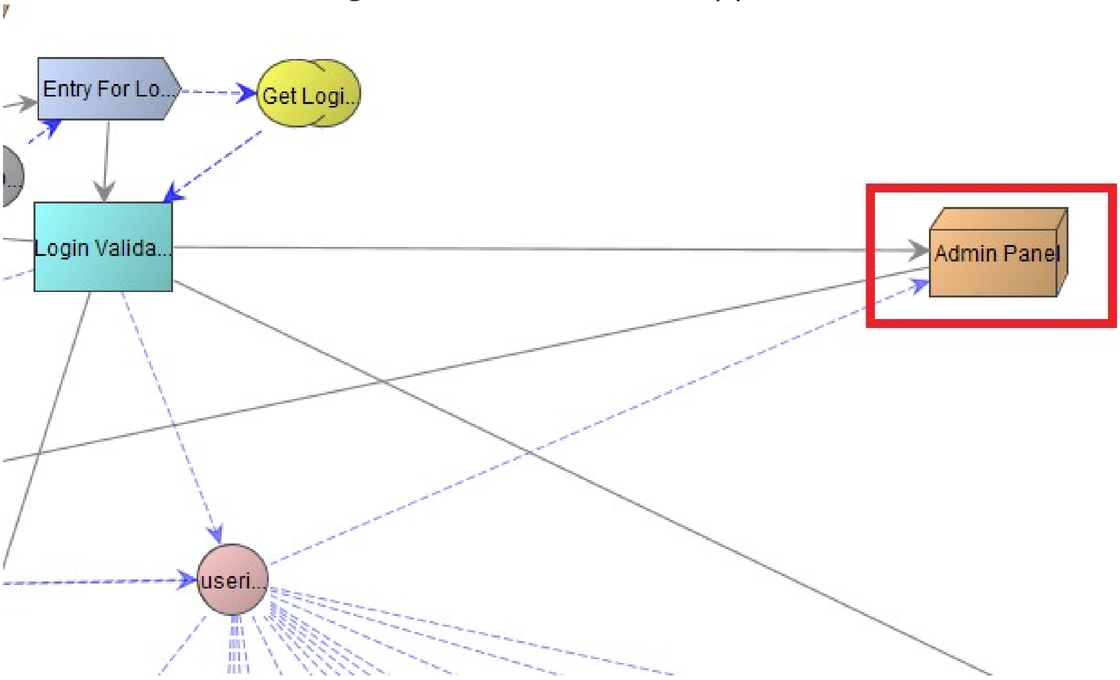
In CRM.Forgot_Password The controls start from the start node where the user will enter their register E-mail Id and through 'email' and 'get email' data node, 'generate OTP' method will create an OTP and email it to the entered email Id, then the method will lead to 'Reset Password' page where the user can set new password after entering valid OTP. If the OTP is valid, then through 'Entry for Save' entry point it will go to the 'Set New Password' method and save a new password then the control leads to the 'login page' finish node. If the OTP is invalid, it will display a failure message with the help of the 'failure' data node on the 'Reset Password Page'.

[B]ADMIN

All Admin related Xsemble Flow and Wireframes are explained below –

Admin Panel is a Subsystem node linked to ‘CRM.Admin’ project.

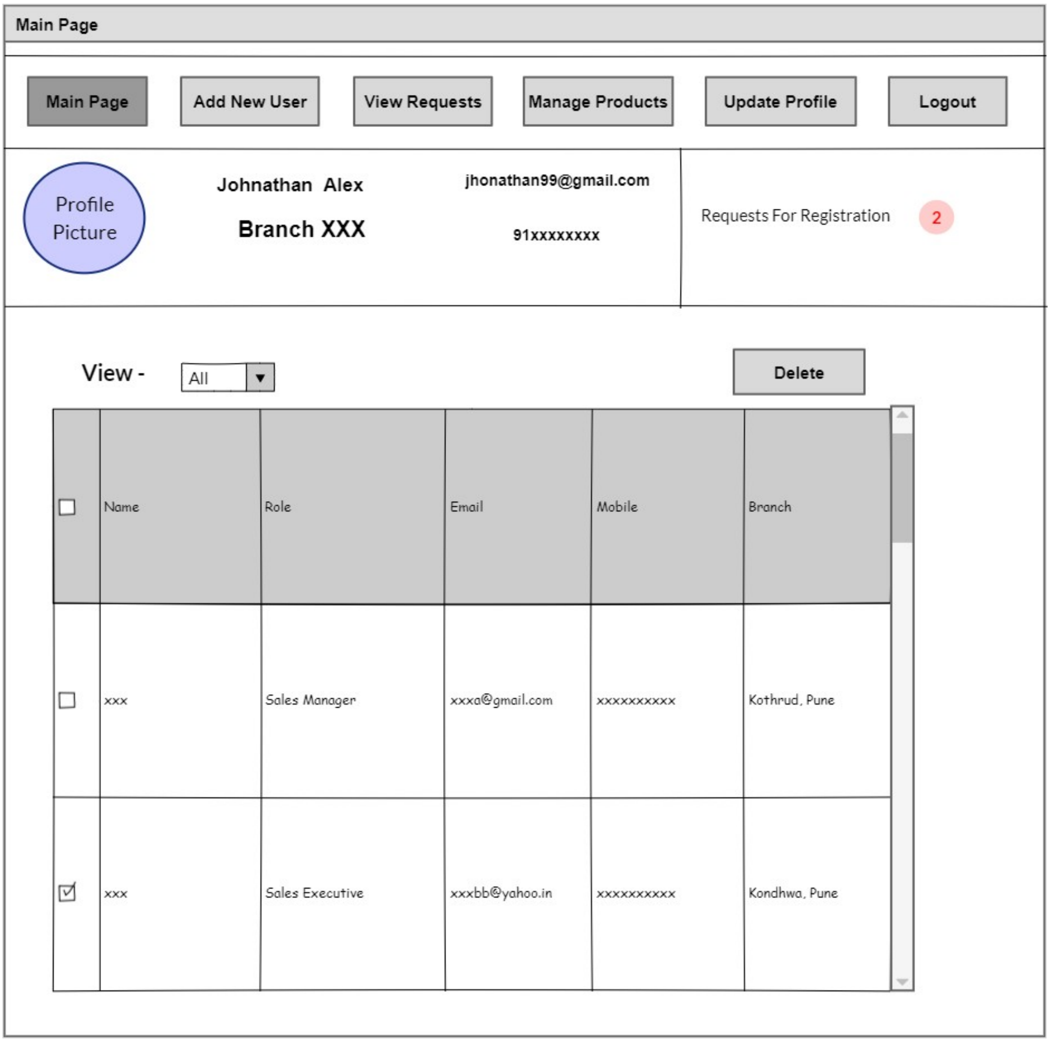
Fig. Admin Panel [CRM.Application]



1. Main Page for Admin

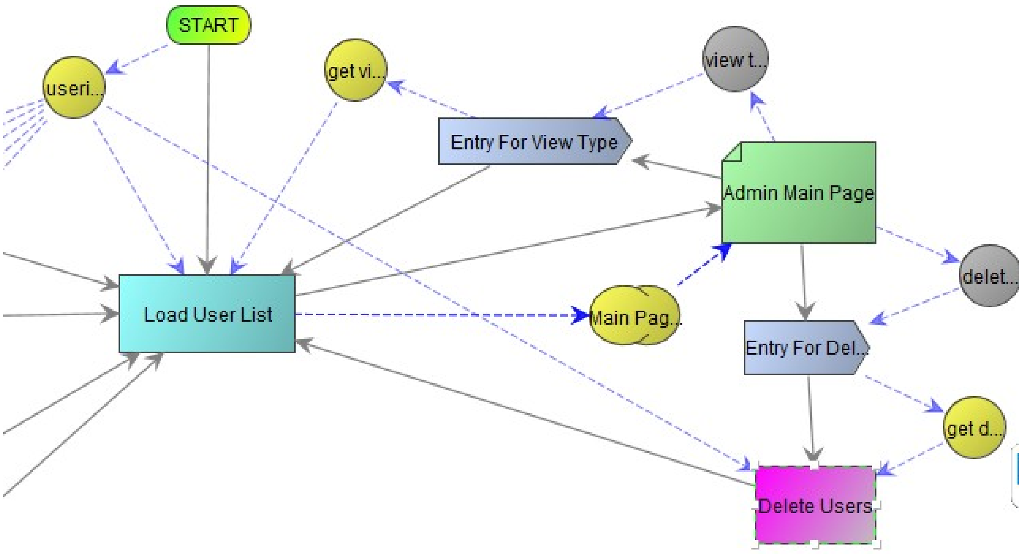
1. Wireframe

Fig 1.1 Admin Main Page [CRM.Admin]



2. Screenshot of Flow

Fig 2.1 Main Page for Admin [CRM.Admin]



3. Explanation

From the start node, the control goes to 'Load User List' Method which loads the list of all user details of the system. The admin can also select the view type as all, all sales Executive, all sales manager and this is done using 'view type' data node or 'get view type' data node or which given to load admin main page method and then that method will load the list of users based on the view type. (Default view type- all)

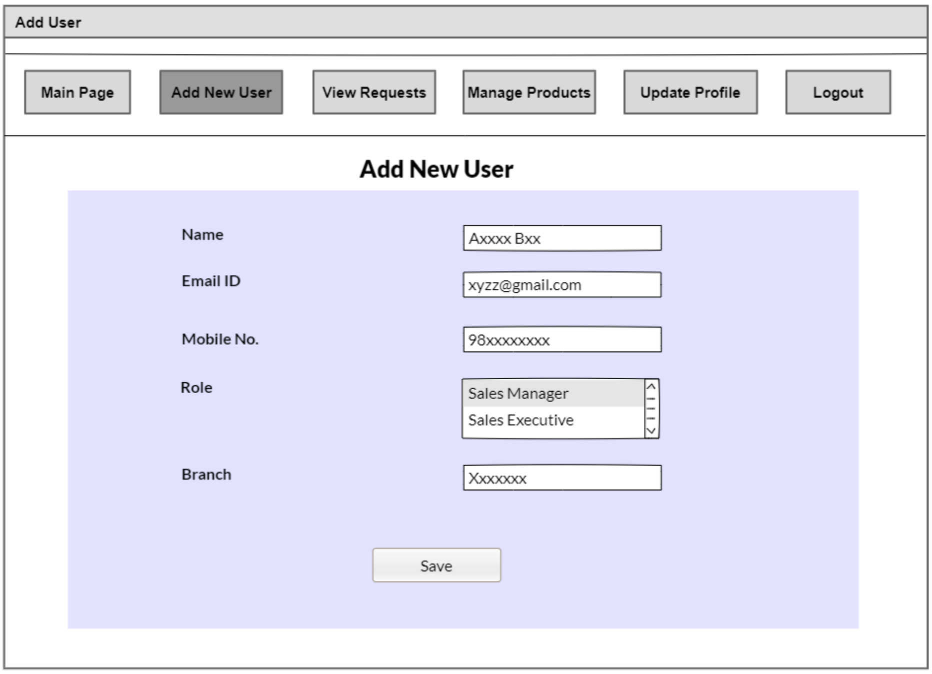
The Main Page for Admin can perform the following actions:

- View Type – By Selecting the View as either All, Sales Manager, Sales Executive; it will load all users or all users having role as sales manager or all users having role as sales executive.
- Delete Users – By Clicking 'Delete' button. (Refer – 1.3Delete Users)

1.2 Add New User

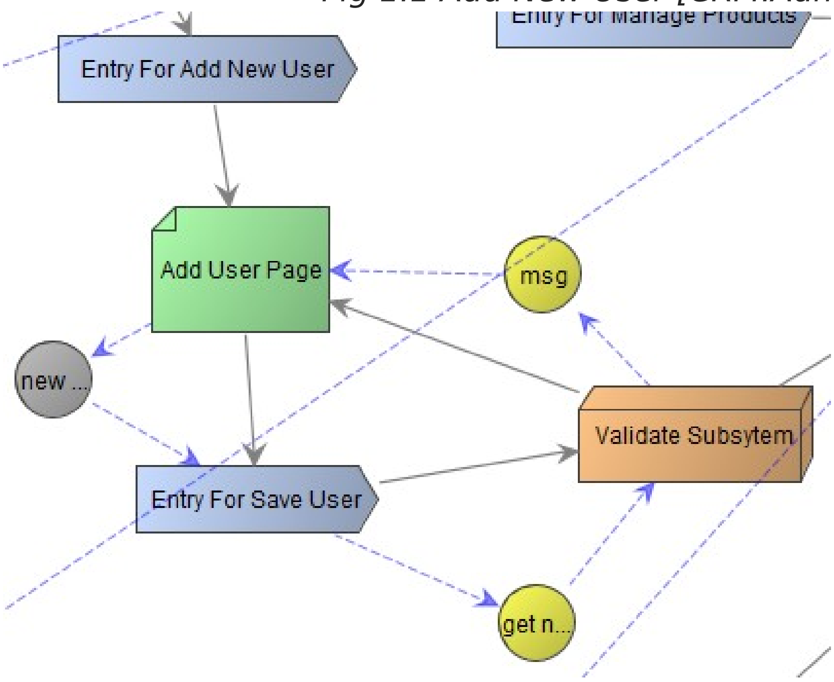
1. Wireframe

Fig 1.1Add User Page [CRM.Admin]



2. Screenshot of Flow

Fig 1.1 Add New User [CRM.Admin]



3. Explanation

When admin clicks on adding a new user on the main page it will go to the 'Add user page' where the admin can add new user details which are passed through 'add user' data node and ‘new user’ data node using an ‘Entry For Registration Page’ to ‘Validate Subsystem’. The ‘Validate Subsystem’ is linked to CRM.Validation_new_user subproject. The ‘Validate Subsystem’ will return a ‘msg' data node back to 'Add user page' which will pop-up as notification message if the user details are successfully saved or not, or invalid user details message.

The Add User Page for Admin can perform the following actions:

- Save –By clicking on save the new user details will be saved using ‘Entry For save user’ entry point to Validate subsystem.

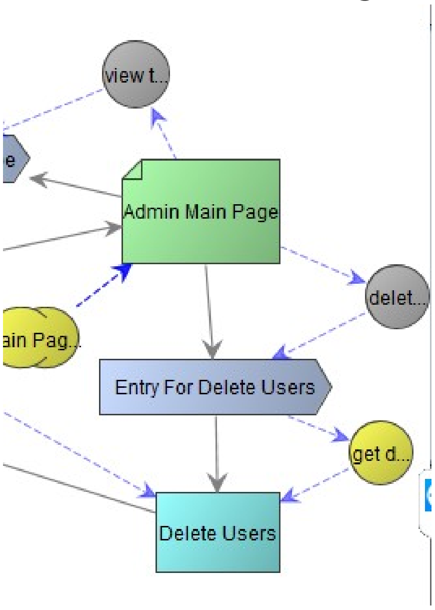
1.3 Delete Users

1. Wireframe

Fig 1.1 Admin Main Page[CRM.Admin]

2. Screenshot of Flow

Fig 2.1 Delete Users [CRM.Admin]



3. Explanation

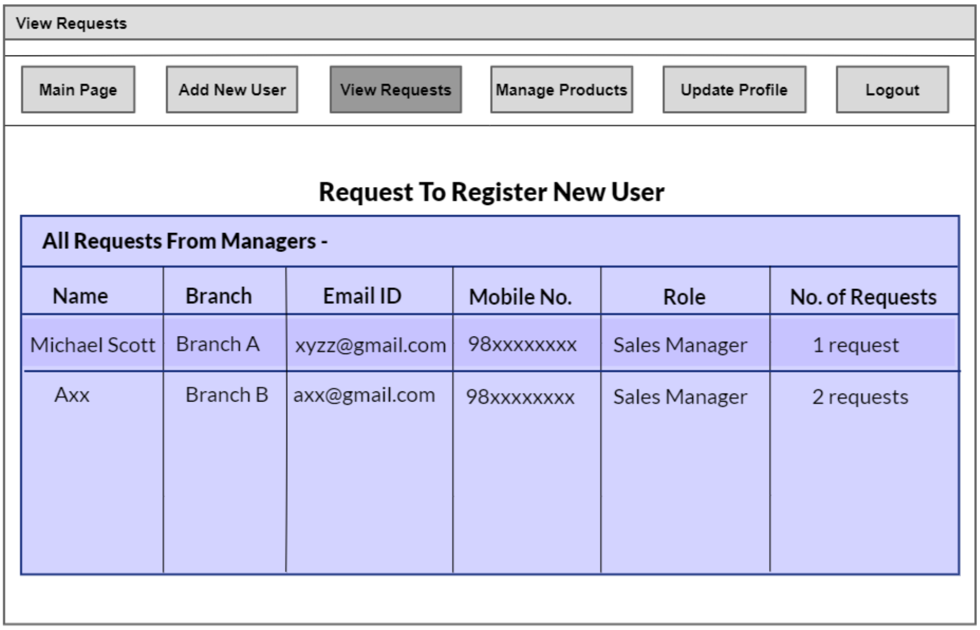
The admin can delete user or users using the 'delete' button. The admin has to select user/users and then click delete.

When admin clicks on delete button all selected user email Id is passed to ‘Delete User’ method using ‘delete user email’ data node and 'get delete user' data node through an ‘Entry for Delete User’ entry point.

1.4View Request List

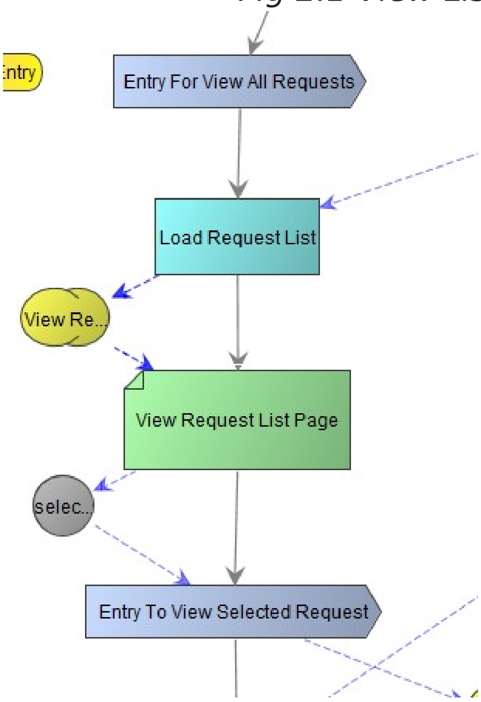
1. Wireframe

Fig 1.1 View Request List Page [CRM.Admin]



2. Screenshot of Flow

Fig 2.1 View List of All Requests [CRM.Admin]



3. Explanation

When admin double clicks on 'View Requests’ in ‘Menu’ it will go to 'load Request List’ method with the help of 'Entry for View All Requests' entry point. The method will load a list of sales manager information along with the total no. of requests by the sales manager on ‘view Requests List’ page.

This Page is displays all requests for registration by manager.

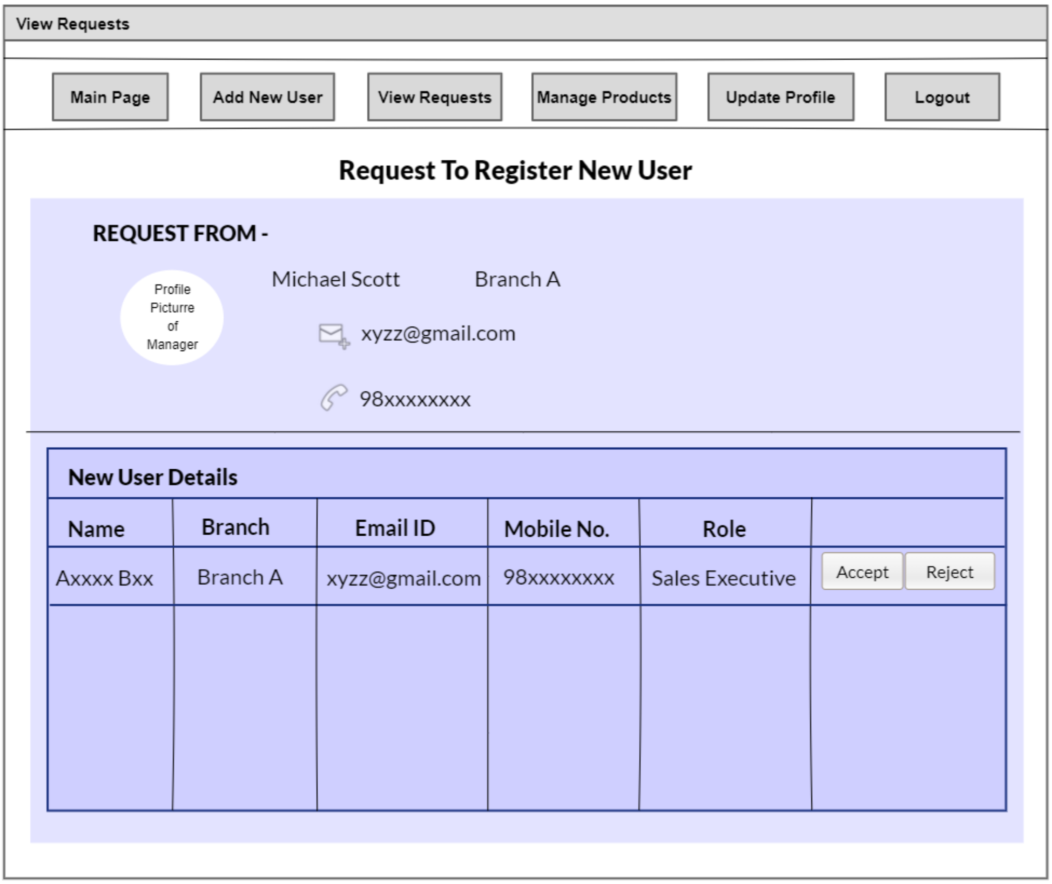
The View All Registration Requests Page for Admin can perform the following actions:

By double clicking on any of the list in menu, it will lead to View Request List Page [Refer – 1.4a View Request List]

1.4a. View Request

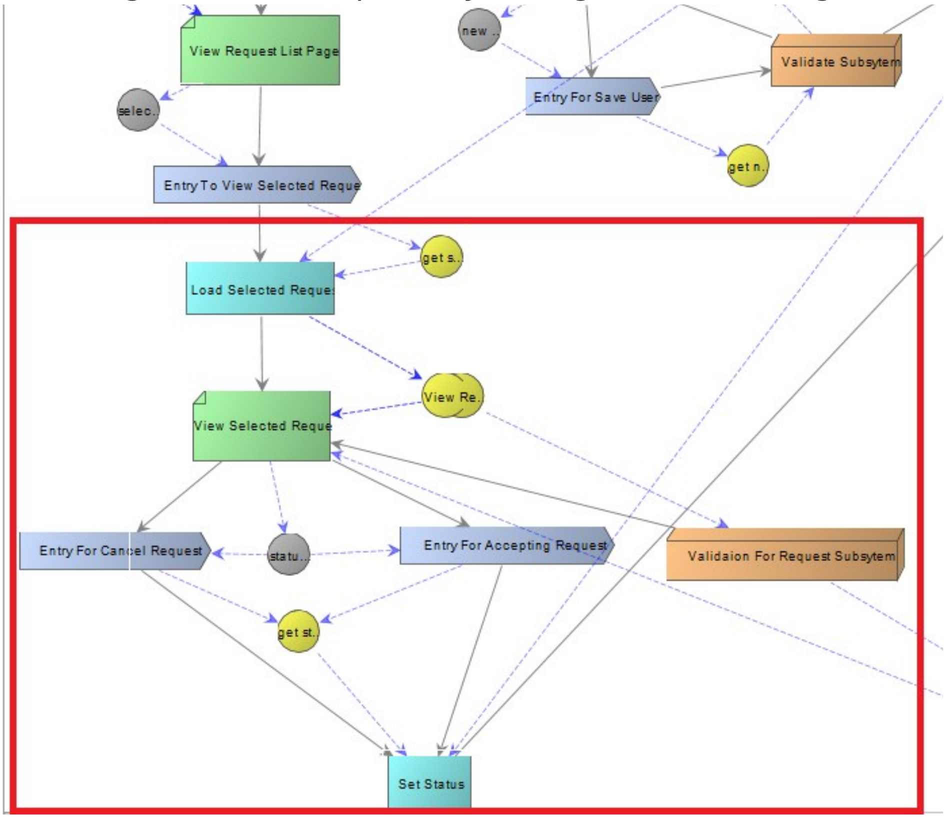
1. Wireframe

Fig 1.1 View Selected Request[CRM.Admin]



2. Screenshot of Flow

Fig 2.1 View Request by a Single Sales Manager [CRM.Admin]



3. Explanation

When admin double clicks on the list in Menu ‘View Requests List’ Page it will go to the 'load Selected Request' method which will load all request details, i.e., manager information and list of sales executive data on ‘View Selected Request’ page. The ‘load Selected request’ method is passed the request id (using ‘select request’ and ‘get selected request’ data nodes and by ‘Entry For View Selected Request’ entry point) by the ‘View Selected Requests’ Page when the admin clicks on the request. The admin can either accept or reject the new sales executive registration for each sales executive on the list. By accepting the request the sales executive data is validated by validate for request subsystem which is linked to CRM.Validate_New_User subproject. By accepting or rejecting a request; the status for request is set in the database for the particular request using ‘Set Status’ method.

The View Selected Request Page for Admin can perform the following actions:

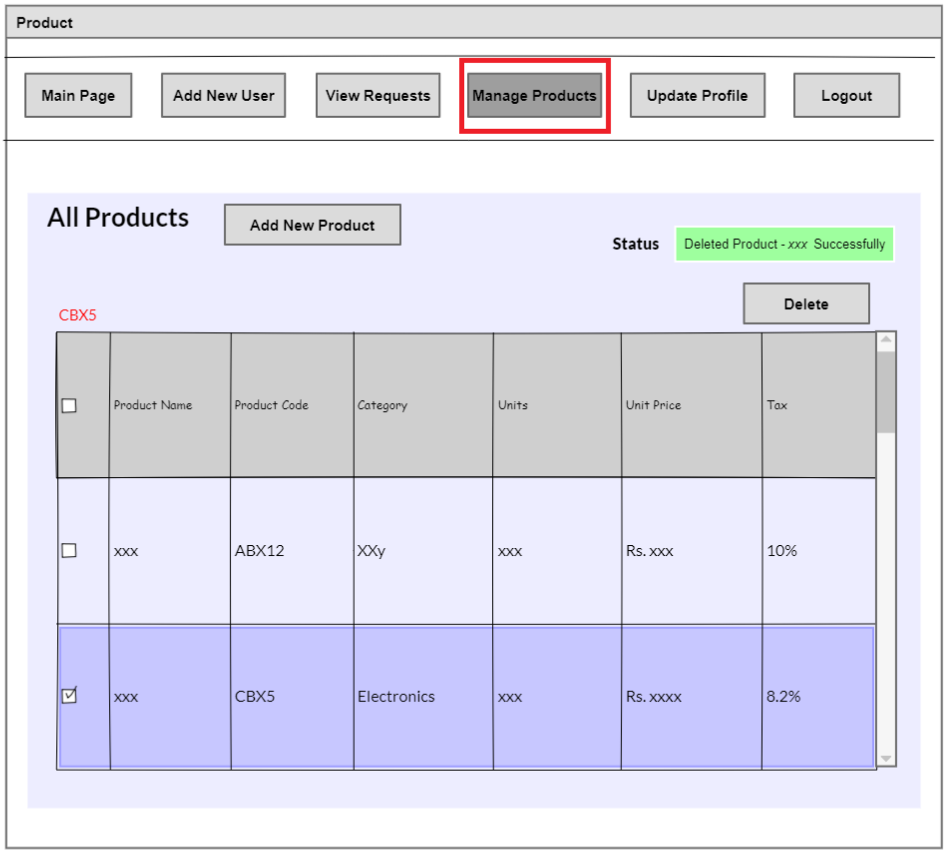
- Accept –By clicking on accept button the new user details will be saved and status will be set to request accepted using ‘Entry For Accepting Request’ entry point.

- Reject –By clicking on reject button the new user details will not be saved and status will be set to request rejected using ‘Entry for Cancel Request’ entry point.

1.5Manage Products

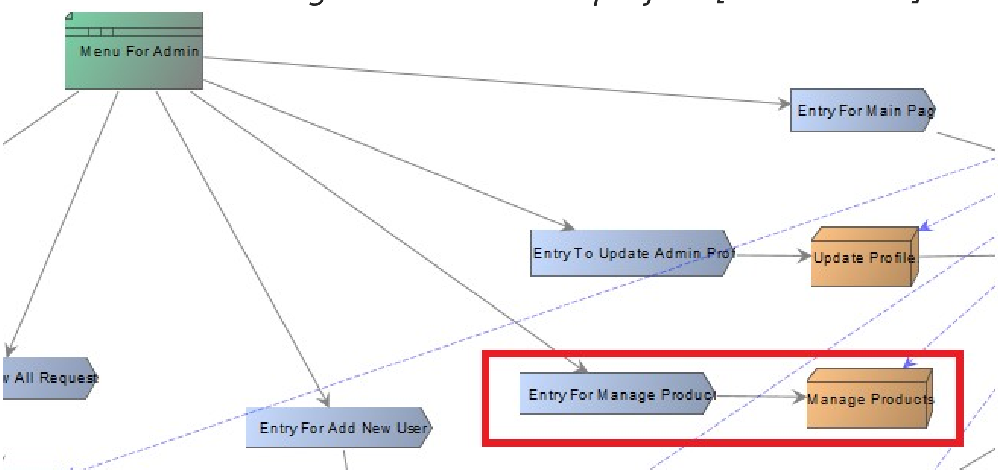
1. Wireframe

Fig 1.1 Product Page [CRM.Admin]



2. Screenshot of Flow

Fig.2.1 Product Subproject [CRM.Admin]



3. Explanation

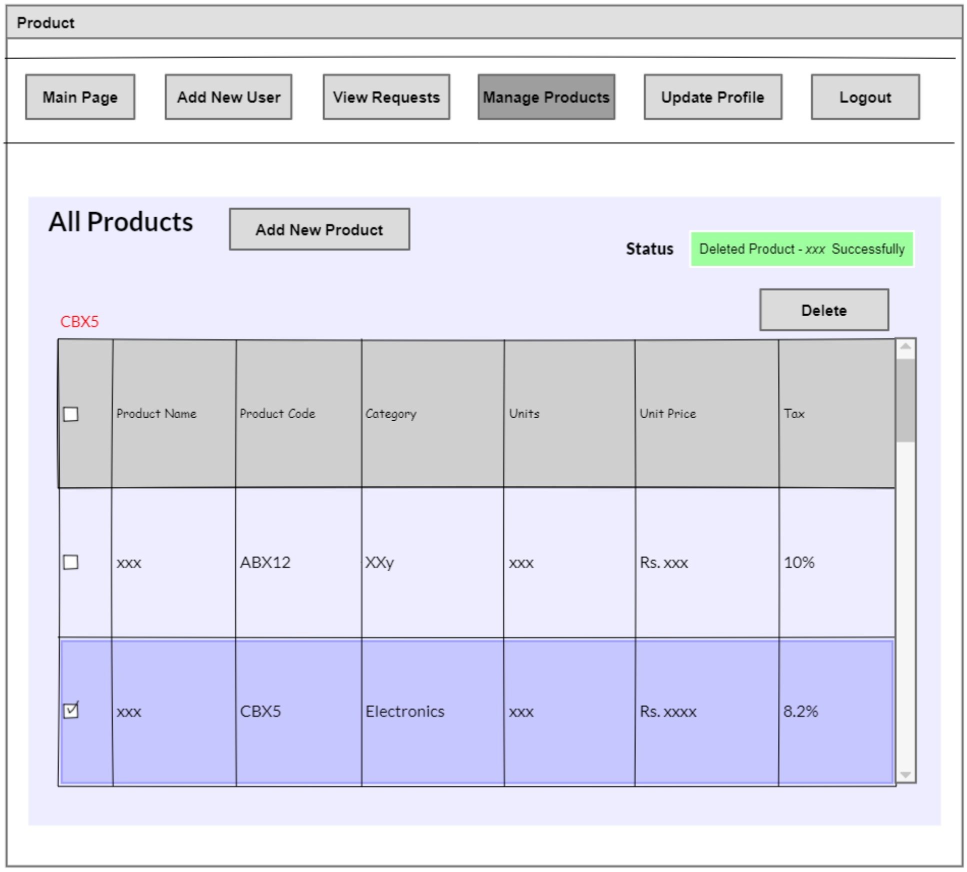
The Product Subsystem is linked to 'CRM.Product' subproject.

By clicking on the Products button in the Menu it will lead to Product Page [in CRM.Product].

1.5a View All Products

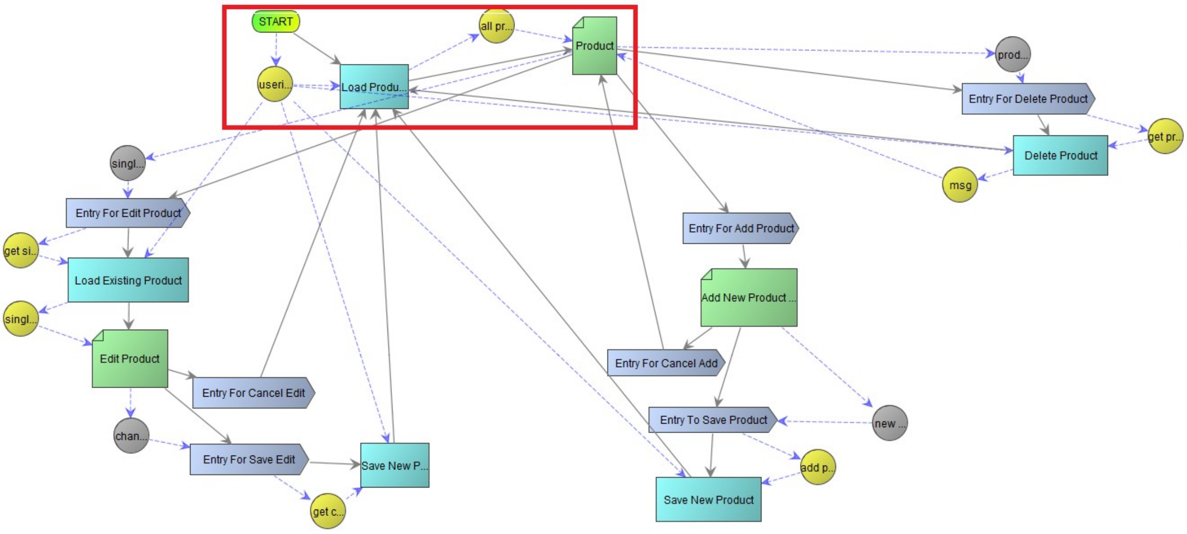
1. Wireframe

Fig 1.1 Product [CRM.Product]



2. Screenshot of Flow

Fig 2.1 View List of Products [CRM.Product]



3. Explanation

In CRM.Product subproject the control will start from the start node and go to ‘Load Product List’ method which will load the list of all product details and display it on the ‘product’ page using ‘all product’ data node.

The Product Page for Admin can perform the following actions:

- Add Product – By clicking on Add New Product button, user can add a product and store it in database using ‘Entry for Add Product’ entry point. (Refer – 1.5b Add Product)
- Delete Product – By selecting products and clicking on delete button, the products will be deleted from the database using ‘Entry for Delete Product’ entry point. (Refer – 1.5c Delete Product)
- Edit Product – By double clicking on any product on the list it will lead to Edit Page using ‘Entry for Edit Product’ entry point and the selected product code is sent when user double clicks using data nodes. (Refer – 1.5d Edit Product)

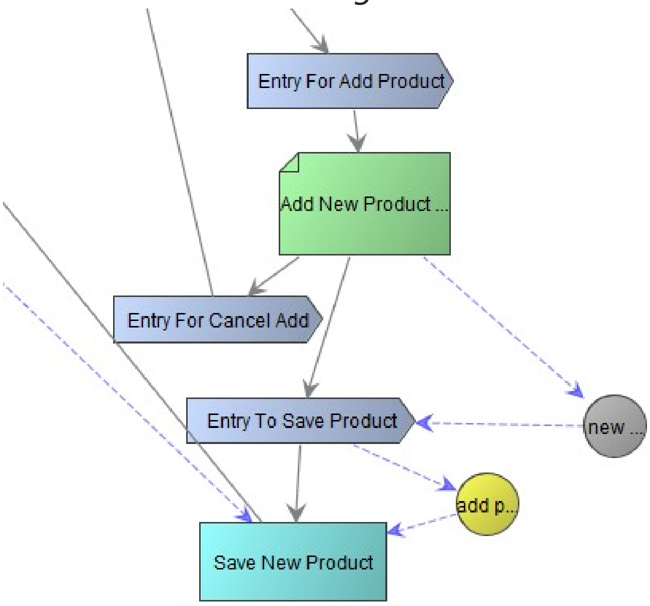
1.5b Add Product

1. Wireframe

Fig 1.1 Add New Product Page [CRM.Product]

2. Screenshot of Flow

Fig 2.1 Add Product [CRM.Product]



3. Explanation

When the Admin clicks on add product button on the product page the control goes to add a new product page through 'Entry For Add product' entry point. The product details are entered in 'Add New Product page'. When admin clicks on the save button, the product details are saved using the 'Save New Product' method. The product details are passed using 'new product' and 'add product' data nodes, using the entry point 'Entry to Save Product'.

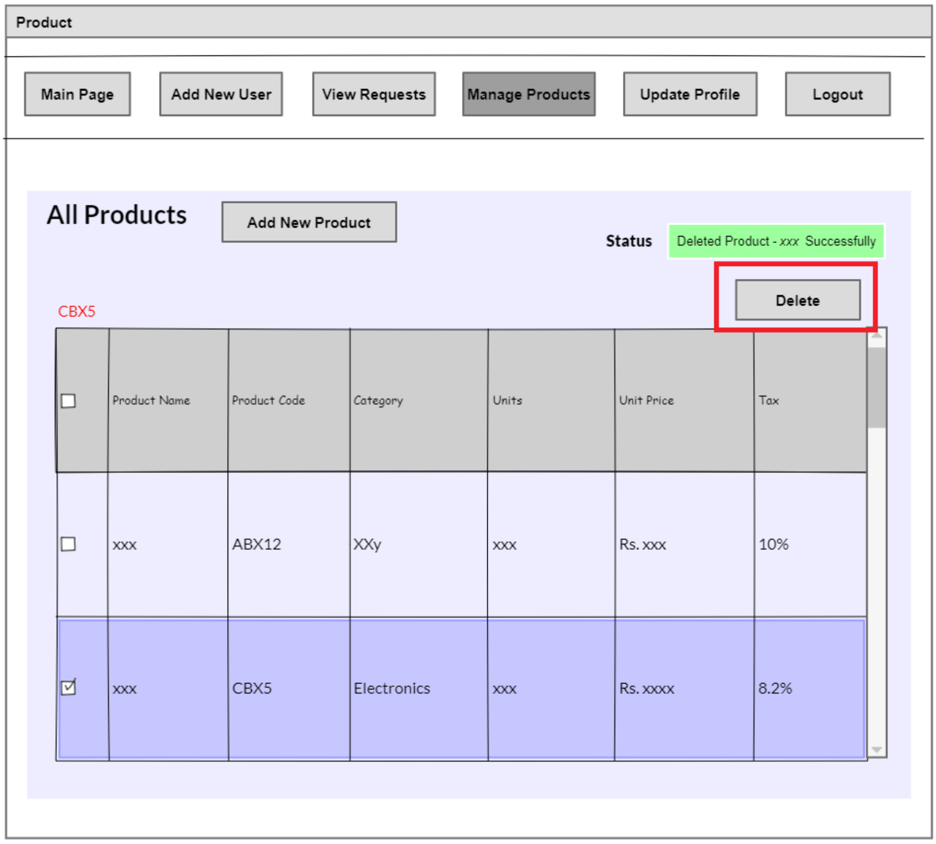
The Add New Product Page for Admin can perform the following actions:

- Save – By clicking on save the new product details will be saved using 'Entry To Save Product' entry point.
- Cancel – By clicking on cancel the control goes back to 'Product' Page using entry point 'Entry For Cancel Add'

1.5c Delete Products

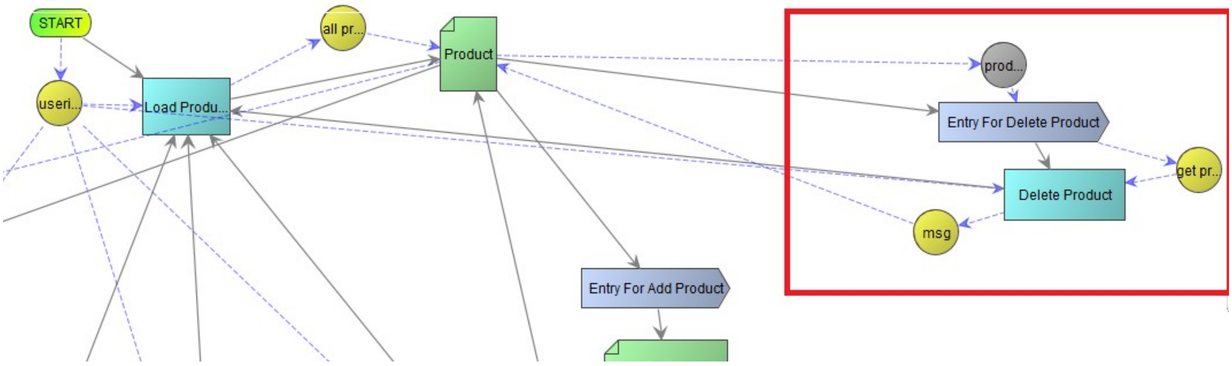
1. Wireframe

Fig 1.1 Product [CRM.Product]



2. Screenshot of Flow

Fig 2.1 Delete Product [CRM.Product]



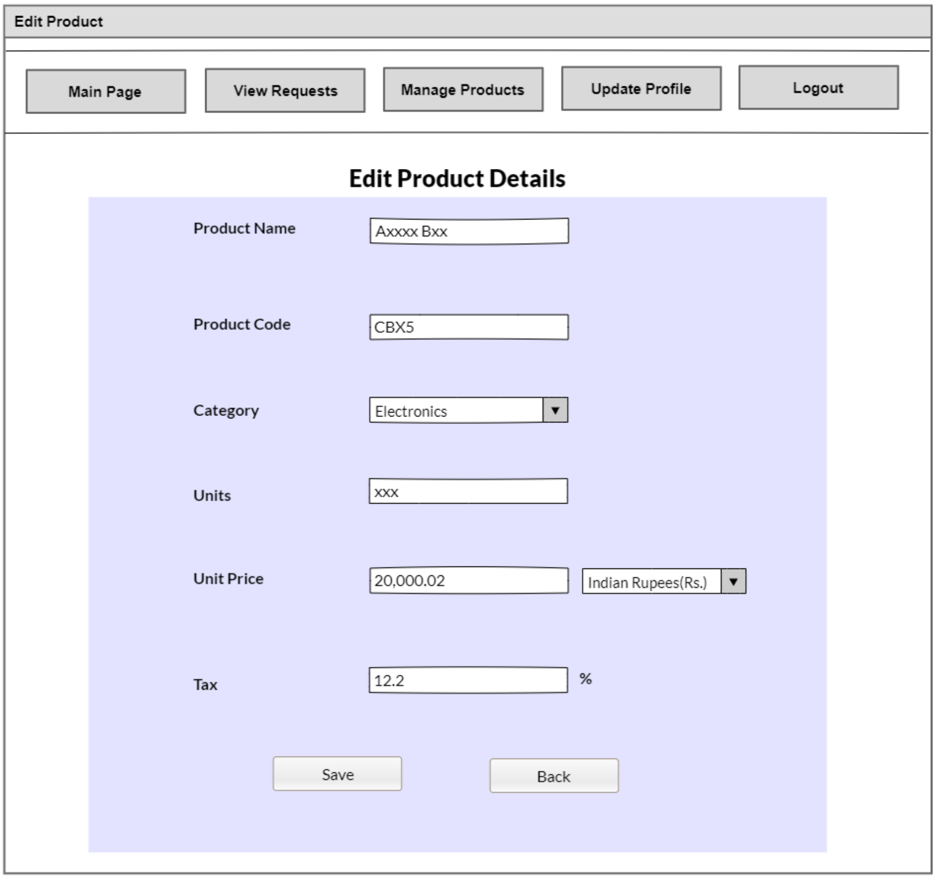
3. Explanation

When the admin selects product/products and clicks on delete button, all the selected products are deleted. The list of product codes of selected products is sent to ‘Delete Product’ method by ‘product code’ and ‘get product code’ data nodes using entry point ‘Entry For Delete Product’.

1.5d Edit Product

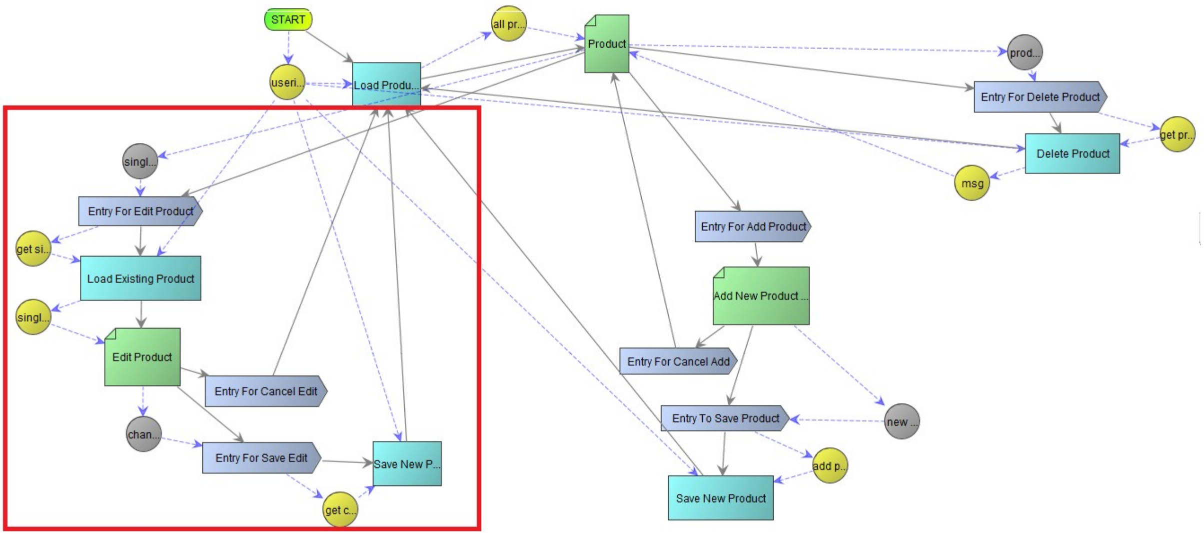
1. Wireframe

Fig 1.1 Edit Product [CRM.Product]



2. Screenshot of Flow

Fig 2.1 Edit Product [CRM.Product]



3. Explanation

By double clicking a product list in a menu, the ‘Product’ Page, the ‘Load Product’ method node will load the existing product details using product code of selected row product which is passed through ‘Entry Point For Edit Product’ entry point node and ‘single product code’ and ‘get single product code’ data nodes and display it in ‘Edit Product’ Page; the loaded product details are displayed using ‘single product details’ node.

In ‘Edit Product’ Page the user can edit details of the product and save it. The new product details are passed to ‘Save New Product’ method which will save the new details for that product using ‘changed product details’ and ‘get changed product details’ data nodes through entry point node -‘Entry For Save Product’.

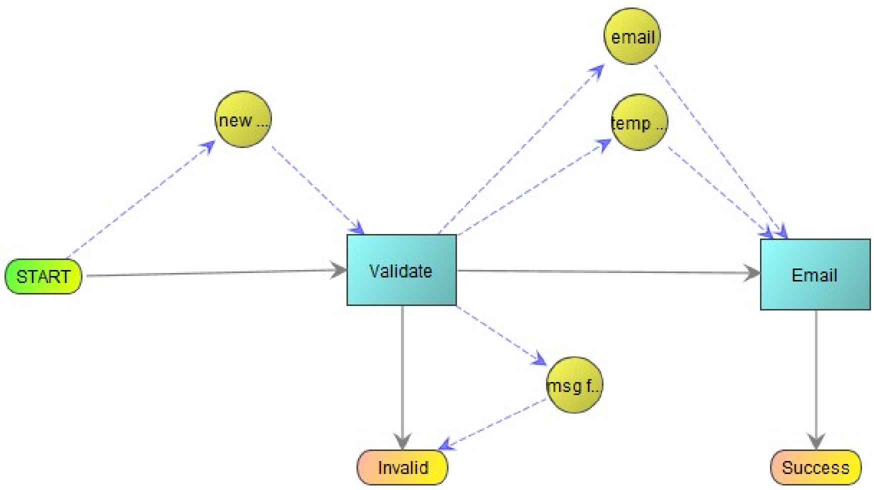
The Edit Product Page for Admin can perform the following actions:

- Save – By clicking on save the new edited product details will be saved using ‘Entry for Save Edit’ entry point.
- Back- By clicking on back button and go to product page using ‘Entry for Cancel Edit’ entry point.

1.6 Validate Subproject

Screenshot of Flow

Fig.Validate User [CRM.Validate_New_User



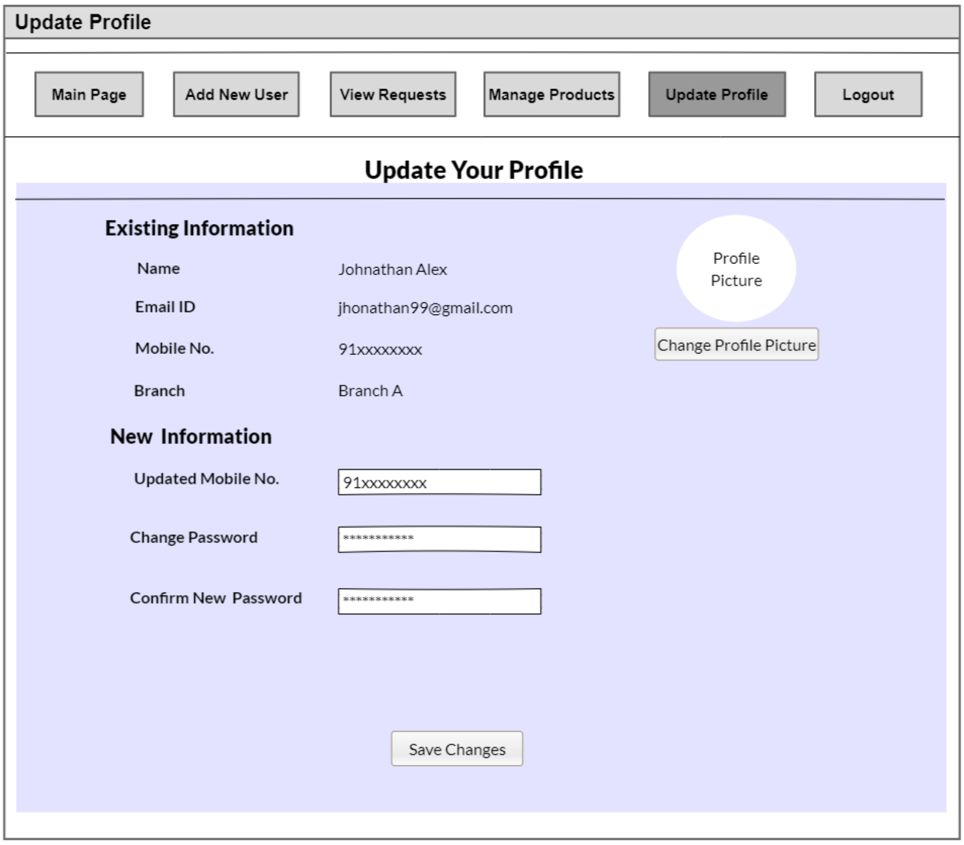
Explanation

Control starts from the 'start' node and goes to ‘validate’ method. User details are passed to a valid method using a 'new user' data node. The validate method will check the user details and see if the email exists or not. If all the user details are valid it will generate a temporary password for that user and save it, and then the control will go to the 'email' method; the ‘validate’ method will pass email and temporary password using data nodes to ‘email’ method. If the user details are invalid it will go 'finish' node; and the ‘Validate ‘method will pass the invalid message as notification using data node. The email method will mail the temporary password to the email given by ‘validate’ method.

1.7 Update Profile

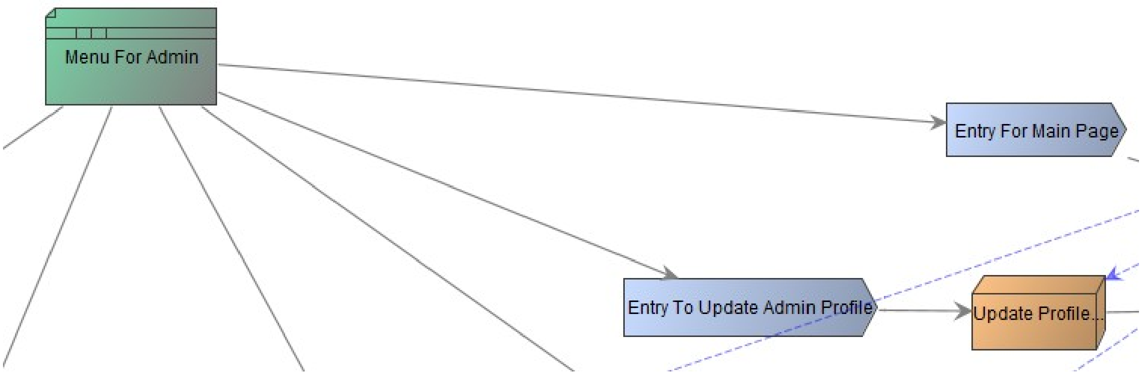
1. Screenshot of Flow

Fig 1.1 Update Profile Page [CRM.Update_User_Profile]



2. Screenshot of Flow

Fig 2.1 Update Profile Subsystem [CRM.Admin]



3. Explanation

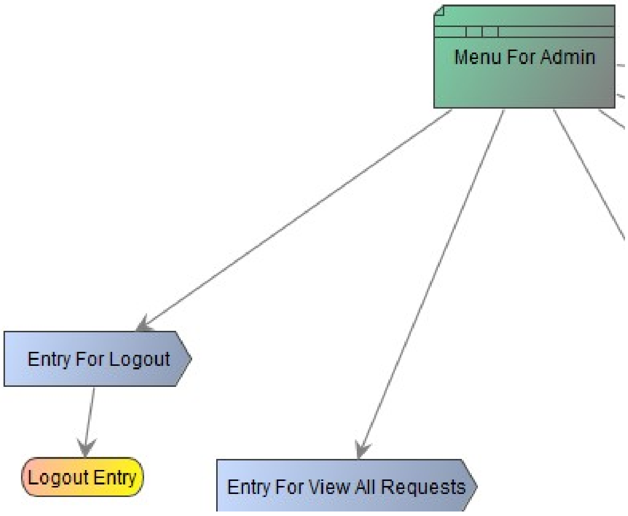
The Update Profile Subsystem is linked to 'CRM.Update_User_Profile' subproject.

By clicking on the Update Profile button in the Menu it will lead to Update Profile Page [in CRM.Update_User_Profile] through 'Entry to Update Admin Profile' entry point node which is then connected to subsystem. (Refer-[E] Update User Profile)

1.8 Logout

Screenshot of Flow

Fig 1.1 Logout Entry Point. [CRM.Admin]



Explanation

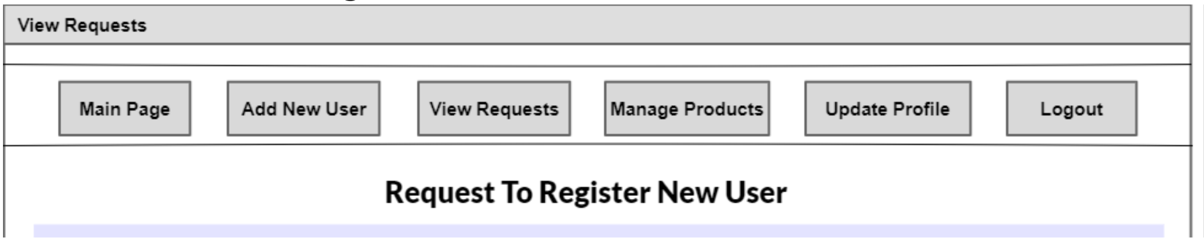
After clicking on the Logout button on the Menu with the help of the 'Entry for Logout,' it will lead to the 'Logout Entry' finish node and it will go to the 'Logout' method in CRM.Application project.

For 'Logout' method (Refer – [A] LOGIN and FORGOT PASSWORD – 1. Login and Logout)

1.9 Menu for Admin

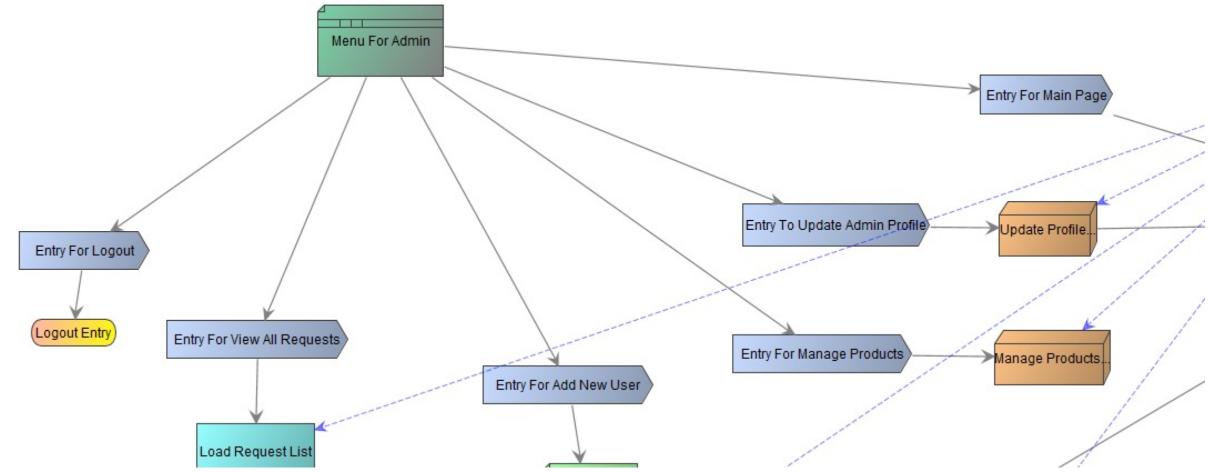
1. Wireframe

Fig1.1 Menu for Admin[CRM.Admin]



2. Screenshot of Flow

Fig 2.1 Menu [CRM.Admin]



3. Explanation

The Menu for Admin can perform the following actions:

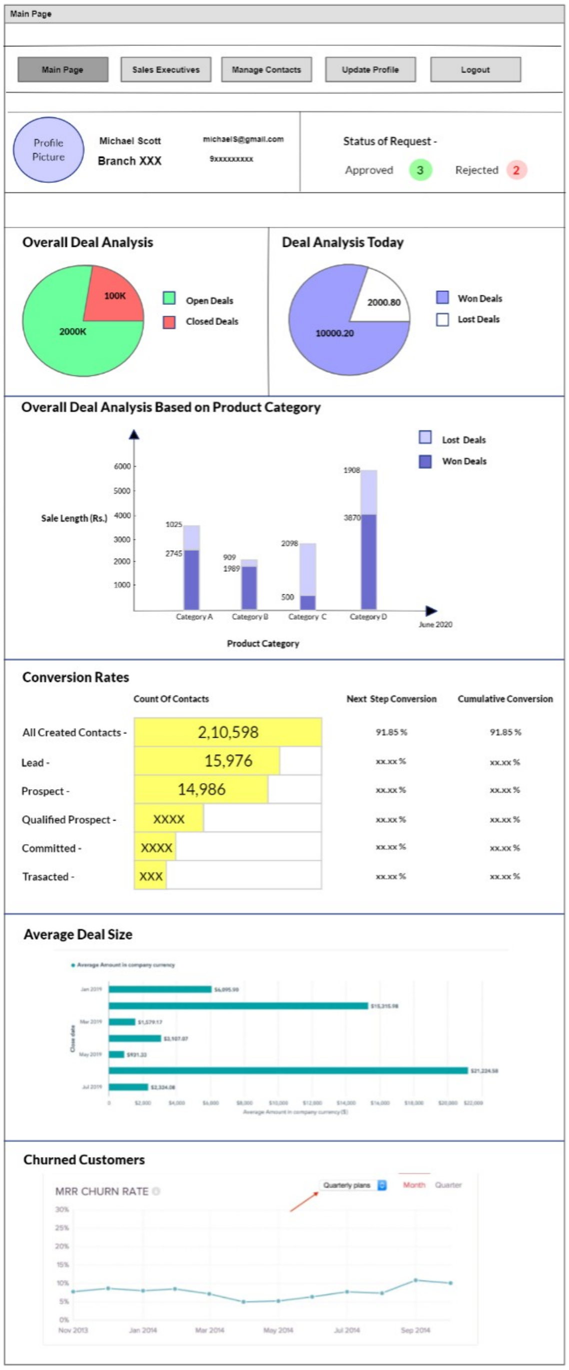
- Main Page – By clicking on 'Main Page' in the menu the control will go to 'Admin Main Page' through 'Entry for Main Page' entry point. (Refer – 1.Main Page for Admin)
- Add New User –By clicking on 'Add New User' in the menu the control will go to 'Add User Page' through 'Entry for Add New User' entry point. (Refer – 1.2 Add New User)
- View Requests – By clicking on 'Add New User' in the menu the control will go to 'View Request List Page' through 'Entry for View All Requests' entry point. (Refer – 1.4View All User Registration Requests)
- Manage Products – By clicking on 'Manage Products' in the menu the control will go to 'Manage Products Subsystem' through 'Entry for Manage Products' entry point. (Refer – 1.5Manage Products)
- Update User Profile – By clicking 'Update Profile' in the menu the control will go to 'Update Profile Subsystem' through 'Entry To Update Admin Profile' entry point. (Refer – 1.6Update Profile)
- Logout – By clicking 'Logout' in the menu.(Refer – 1.7Logout)

[C] SALES MANAGER

1. Main Page for Sales Manager

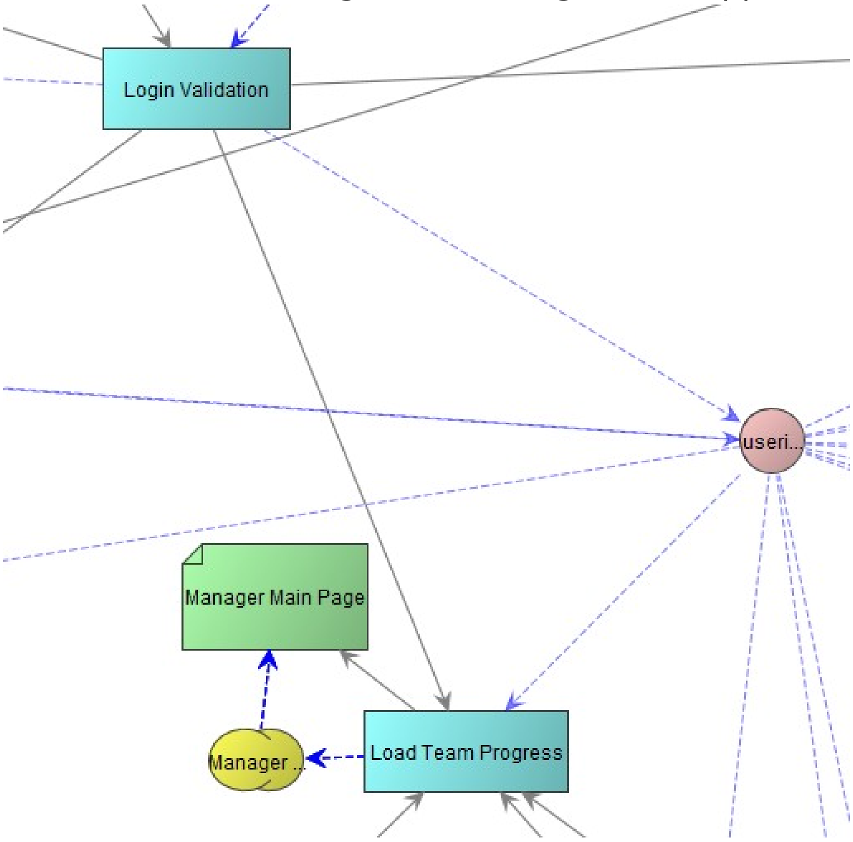
1. Wireframe

Fig 1.1 Manager Main Page [CRM.Application]



2. Screenshot of Flow

Fig 2.1 Main Page [CRM.Application]



3. Explanation

The Manager main page of the sales manager will display team progress data. It displays information like the status of the request, (number of approved requests and rejected request, overall deal analysis (total value of open and close deals), Deal analysis today (value of won and loss deals of today), overall deal analysis based on product analysis (total value of won and loss deals for product category).

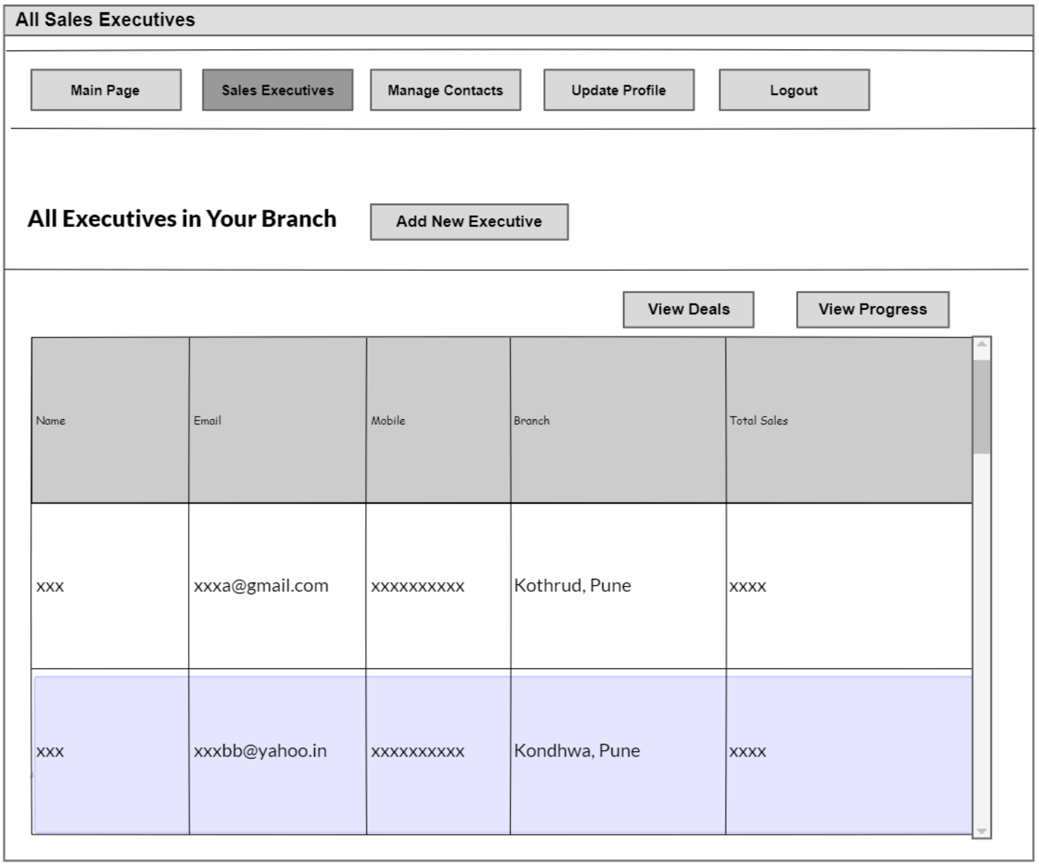
It shows the conversion rates ("conversion rate" refers to your ability to convert prospects into leads and leads into customers.), average deal size (average deal size is crucial in predicting revenue and monitoring the soundness of your sales pipeline.), and churned customers (Understanding why people churn out of your customer base can be even more revealing than evaluating why deals were lost).

All this analytic data is loaded by the 'Loads Sales Manager Main Page' method and displayed on the main page for Sales Manager using group data node 'Manager Main Page Contains'.

<u>*1.2 View Sales Executives*</u>

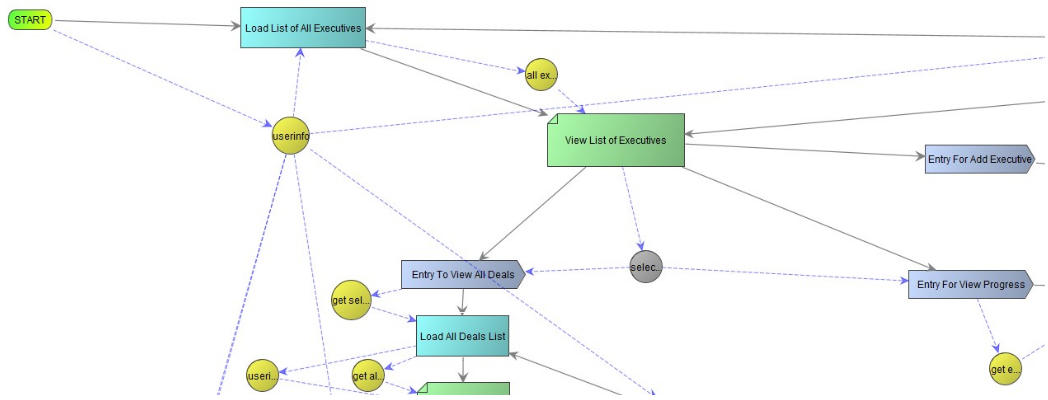
1. Wireframe

Fig 1.1 View List of Executives[CRM.View_And_Manage_Sales_Executivies]



2. Screenshot of Flow

Fig 2.1 View List of Sales Executives [CRM.View_And_Manage_Sales_Executivies]



3. Explanation

When the user clicks on the 'Sales Executive' button on the menu, for the Sales Manager the control goes to 'View and Manage Executives Sub-

System' which is subproject node linked CRM.View_And_Manage_Sales_Executivies subproject.

In CRM.View_And_Manage_Sales_Executivies the controls start from the Start node and the ‘Load List of All Executive’ method will load a list of all sales executive details under the user (who is a sales manager) and display on 'View List of Executives' Page using data 'all executive information' data node.

The View All Sales Executives Page for Sales Manager can perform the following actions:

- View Selected User Deals – By clicking on View Selected User Deals button in the ‘View List of Executives’ page, will lead to ‘View Deal List Page’ page through ‘Entry To View All Deals’ entry point. This button is only active when a user from the list is selected and the selected user email is sent to those pages/methods using entry point and data nodes. (Refer – 1.2c View Selected User Deals)
- View Selected User Progress – By clicking on View Selected User Progress button in the ‘View List of Executives’ page, will lead to ‘Progress Page’ page through ‘Entry For View Progress’ entry point. This button is only active when a user from the list is selected and the selected user email is sent to those pages/methods using entry point and data nodes. (Refer – 1.2b View Selected User Progress)
- Add New Executive – By clicking on View Selected User Deals button in the ‘View All Sales Executives’ page, will lead to ‘Add Executive Page’ page through ‘Entry For Add Sales Executive’ entry point. (Refer – 1.2a Add New Executive)

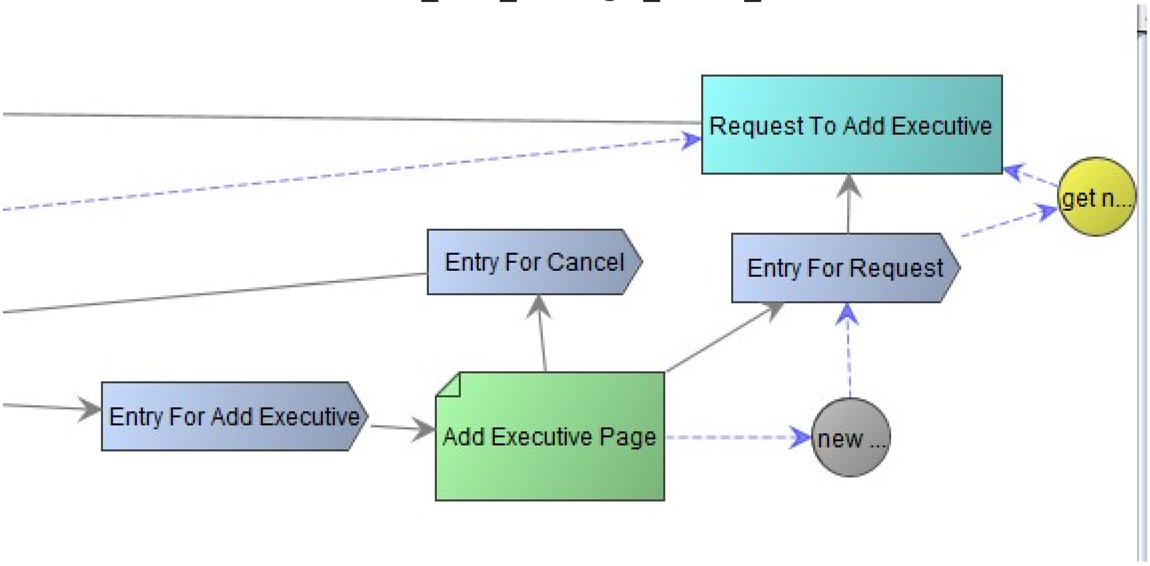
1.2a Add New Executive

1. Wireframe

Fig 1.1 Add Executive Page [CRM.View_And_Manage_Sales_Executivies]

2. Screenshot of Flow

Fig 2.1 Add Executive Request [CRM.View_And_Manage_Sales_Executivies]



3. Explanation

When a user clicks on the 'Add new Executive' button the control goes to 'Add Executive Page' through an entry point 'Entry For Add Executive'; where the user can enter details of new Executive that they want to add into the system.

This page will send a request to the admin to add the new executive to the system and this is done by ‘Request To Add Sales Executive’ method.

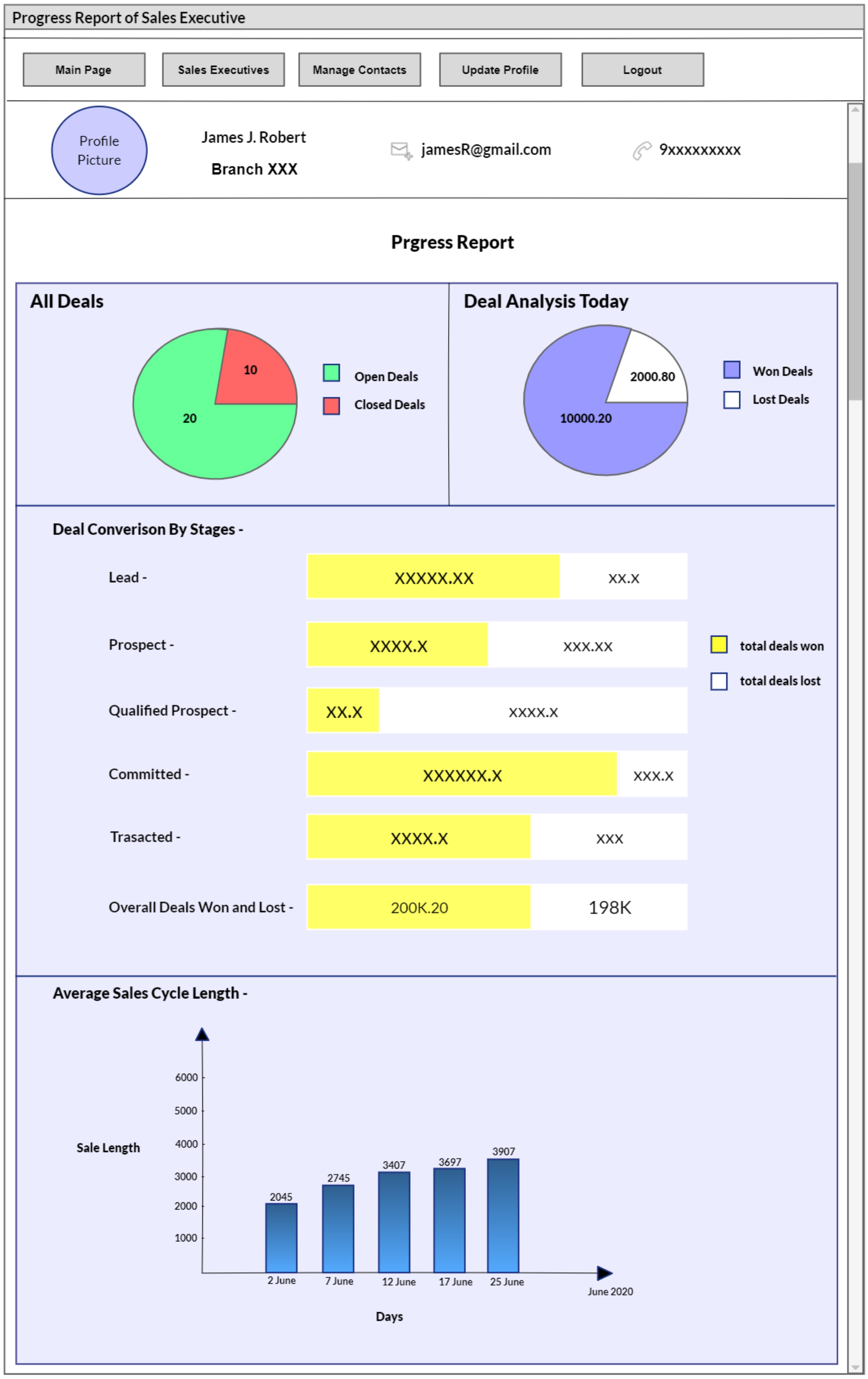
The Add Executive Page for Sales Manager can perform the following actions:

- Send Request – By clicking on Send Request button in the ‘Add Executive Page’ page will send request to admin.
- Cancel – By clicking on Cancel button in the ‘Add Executive Page’ page, will lead to ‘View List of Executives’ page through ‘Entry For Cancel’ entry point.

1.2b View Selected User Progress Report

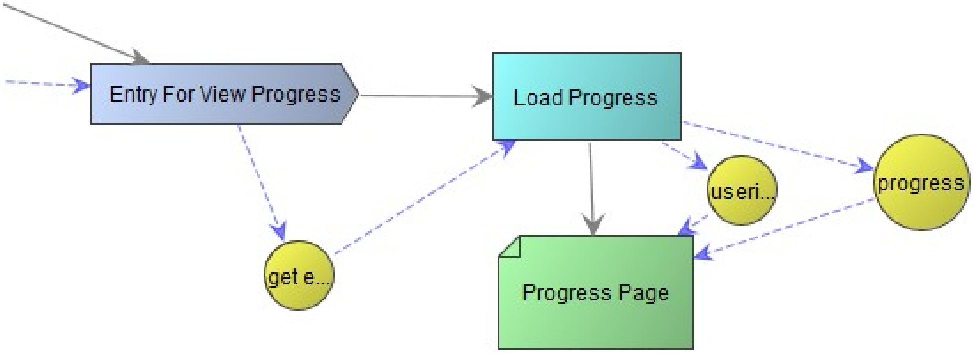
1. Wireframe

Fig 1.1 Progress Page [CRM.View_And_Manage_Sales_Executivies]



2. Screenshot of Flow

Fig 2.1 View Progress Report [CRM.View_And_Manage_Sales_Executivies]



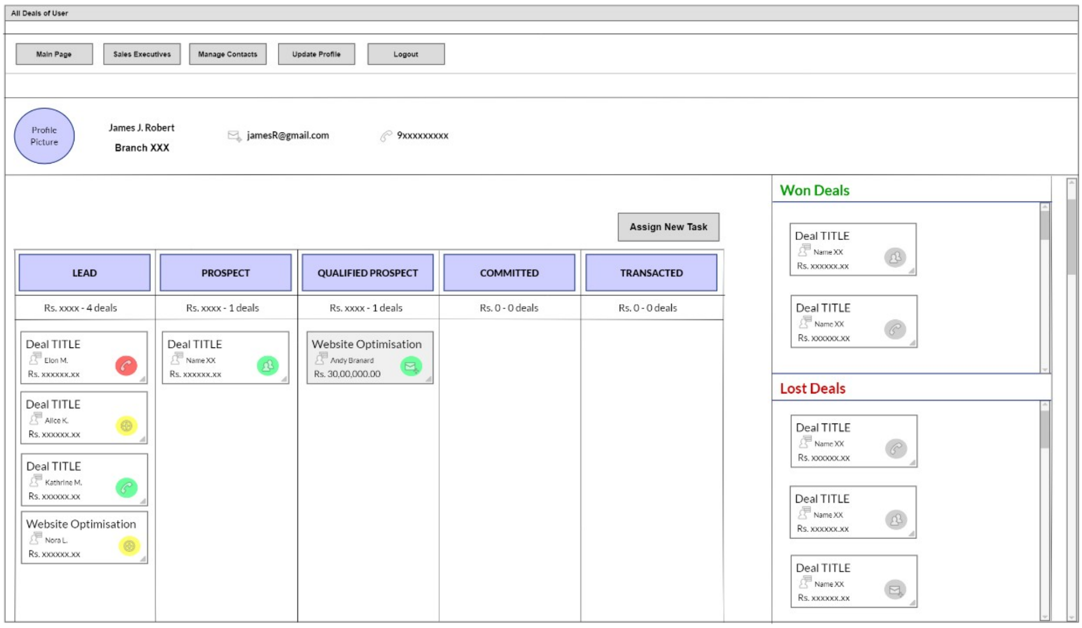
3. Explanation

When the user clicks on the 'View progress’ button the control goes to the 'Load Progress' method by the 'Entry For View Progress' through the entry point, this method will load all progress details for selected Sales Executive and display it on the ‘Progress page’.

1.2c View Selected User Deals

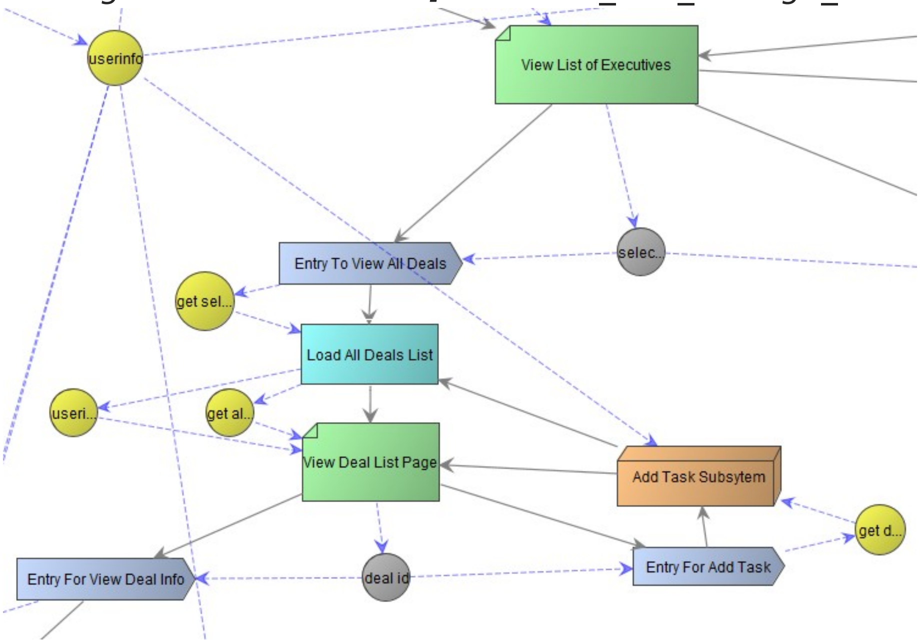
1. Wireframe

Fig 1.1 View Deal List Page[CRM.View_And_Manage_Sales_Executivies]



2. Screenshot of Flow

Fig 2.1 View All Deals [CRM.View_And_Manage_Sales_Executivies]



3. Explanation

When the user clicks on the 'View Deals' button on the ‘View List of Executive’ page the control goes to the 'Load all Deals List' method which will receive the selected user email through 'Entry To View All Deals' entry point and 'selected user email' and 'get selected user email' data nodes, and retrieve a list of all deals of the selected Sales Executive and display it on the 'View List of Executive' page using data node 'get all deals in pipeline'. The 'View Deal List Page’ will display Sales Executive deals which are retrieved from 'Load All deals List ' method using 'user info of sales executive'.

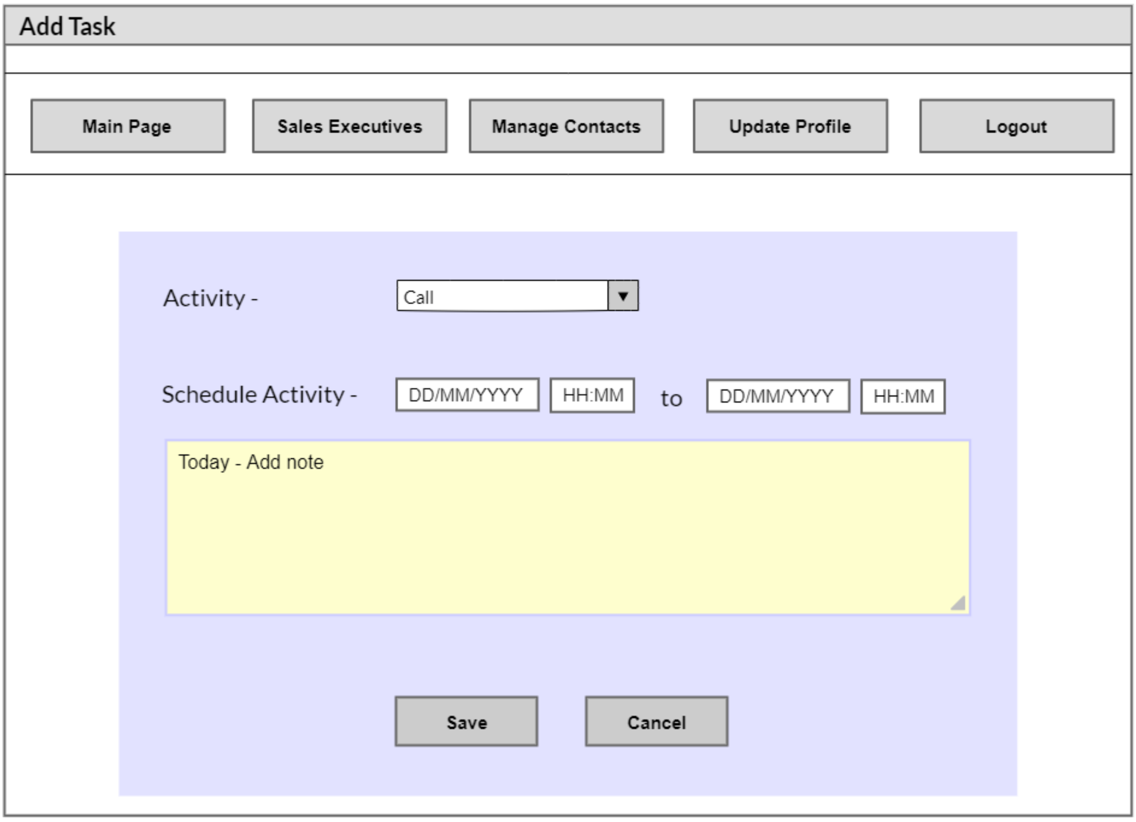
The View All Deal Page for Sales Manager can perform the following actions:

- Assign Task/Activity – By clicking on Assign New Task button in the 'View List of Executive', will lead to ‘Add Task From View Deal Information Subsystem’ which is linked to CRM.Add_Task subproject. This button is only active when the ongoing deals in from the list of deals is selected and the selected deal id is sent to the subsystem ‘Add Task From View Deal Information’ using ‘Entry For Add Task’ entry point and ‘deal id’ and ‘get deal id’ data nodes. (Refer – 1.2d Assign New Task)
- View Deal Information – By double-clicking on any deal in the ‘View Deal List Page’, will lead to ‘View Deal In Detail Page’. (Refer – 1.2e View Detailed Deal Information)

1.2d Assign New Task

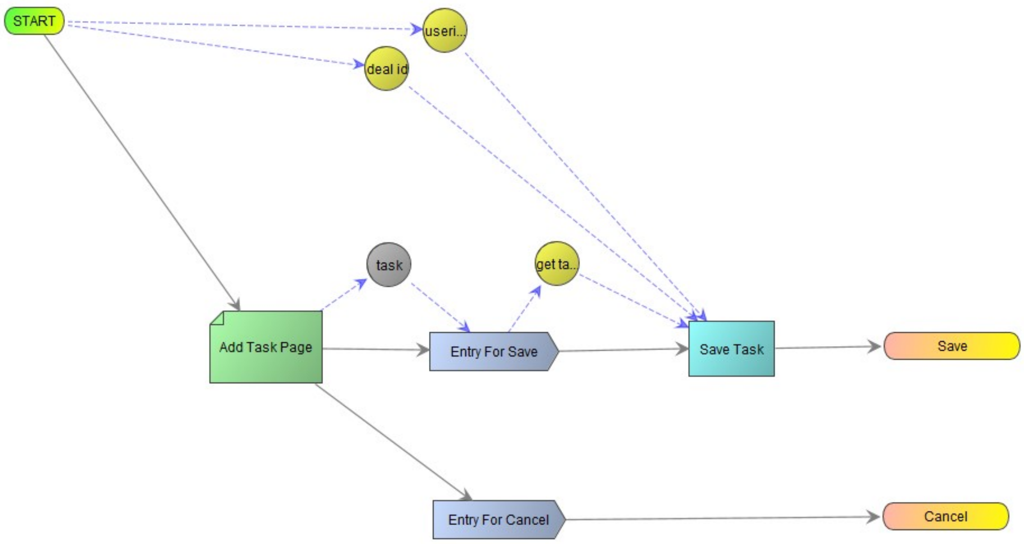
1. Wireframe

Fig 1.1 Add Task Page[CRM.Add_Task]



2. Screenshot of Flow

Fig 2.1 Assign task to Sales executive for a deal [CRM.Add_Task]



3. Explanation

In CRM.Add_Task subproject the control will start from the start node and enter to 'Add Task' page. Where the Sales Manager can assign any Task/Activity to the Sales Executive for any ongoing deal. This data is saved by the 'Save Task' method using 'task and get task' data nodes through 'Entry For Save' entry point. The deal Id for the selected deal is given to the 'save task' method. After saving the task/activity the control goes to the 'Load Deal Information' finish node.

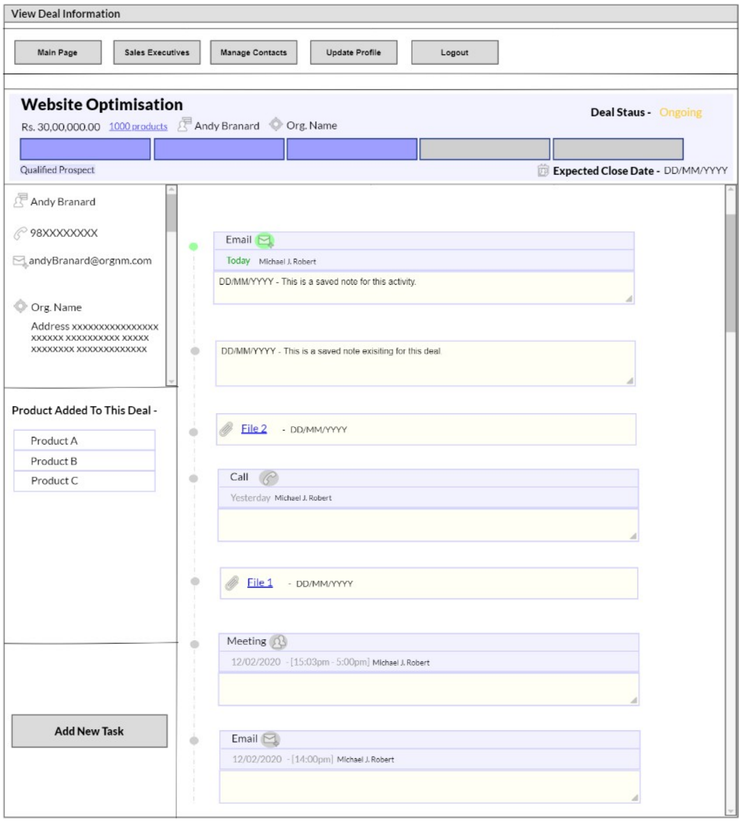
The Add Task Page for Sales Manager can perform the following actions:

- Save Task/Activity – By clicking on Save button in the ‘Add Task Page’, will lead to ‘Entry For Save’ entry point.
- Cancel – By clicking on Cancel button in the ‘Add Task Page’, will lead to ‘Load All Deals’ finish node through ‘Entry For Cancel’ entry point.

1.2e View Detailed Deal Information

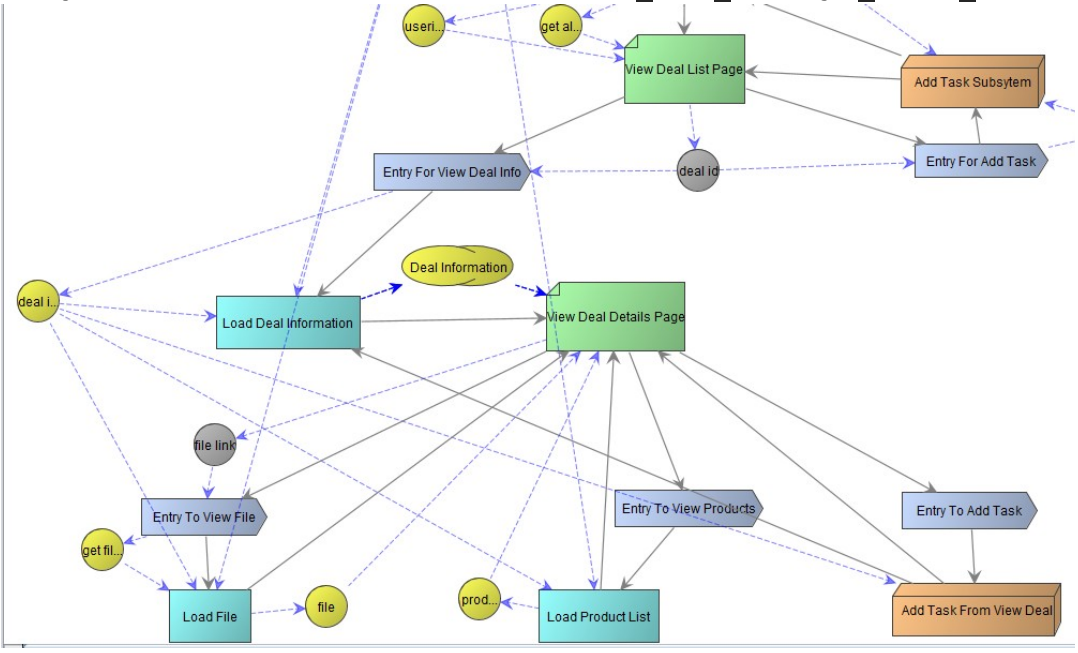
1. Wireframe

Fig 1.1 View Deal Details Page [CRM.View_And_Manage_Sales_Executivies]



2. Screenshot of Flow

Fig 2.1 View Deal In Detail [CRM.View_And_Manage_Sales_Executivies]



3. Explanation

When the Sales Manager double clicks on any deal in ‘View Deal List page’ the control goes to the 'Load Deal Information' method through the 'Entry for View deal Info' entry point and selected deal Id is given to 'Load Deal information' method using 'deal id' and 'deal id to load deal' data node. Using this 'deal id' data the method retrieves all deal information like - List of all activities, number of total product, and product name, list of files, notes, etc. and display it on 'View Deal Details' page using 'Deal Information' group data node.

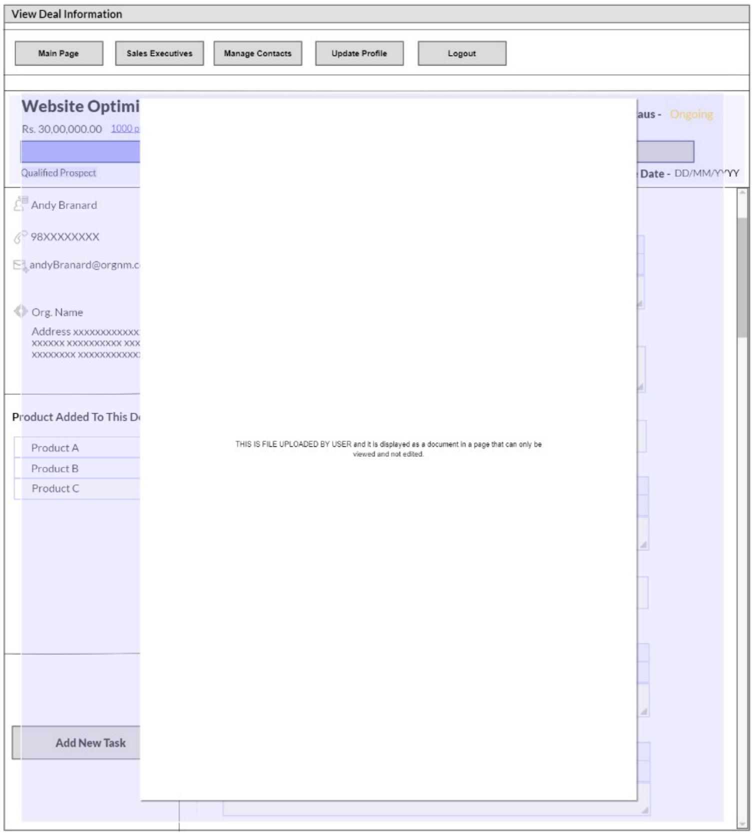
The View Deal Details Page for Sales Manager can perform the following actions:

- Assign Task/Activity – By clicking on Assign New Task button in the 'View Deal Details' page, will lead to ‘Add Task From View Deal ‘through ‘Entry To Add Task’ entry point, where the subsystem is linked to CRM.Add_Task subproject. This button is only active for ongoing deals of Sales Executive. (Refer – 1.2d Assign New Task)
- View Product – By clicking on no. of products added to this deal (i.e., 1000 products) link in the 'View Deal Details' page, will lead to ‘Entry Point To View Product’ entry point. (Refer – 1.2g View Added Products)
- View File - By clicking on file link displayed in the 'View Deal Details' page, will lead to ‘Entry To View File’ entry point. (Refer – 1.2f View File)

1.2f View File

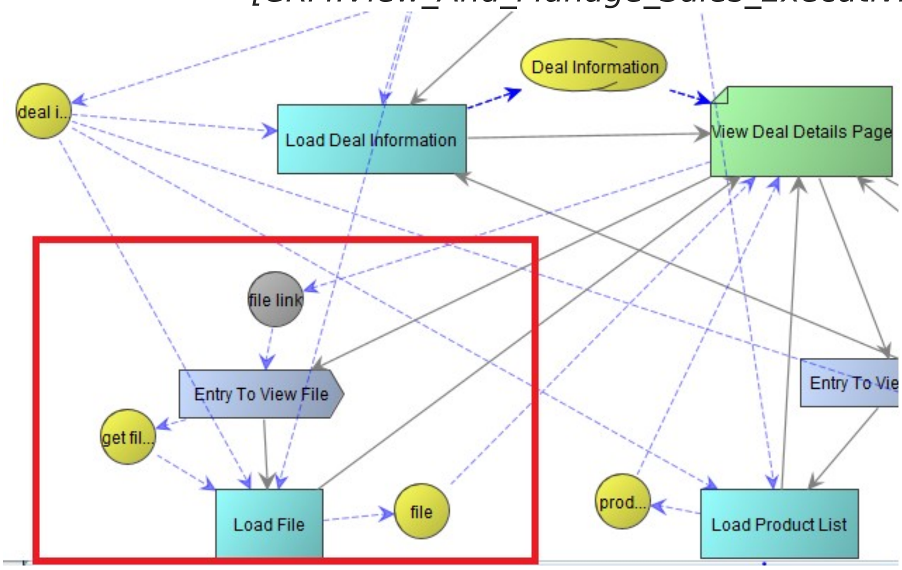
1. Wireframe

Fig 1.1 View Deal Details Page [CRM.View_And_Manage_Sales_Executivies]



2. Screenshot of Flow

Fig 2.1 ViewingFile uploaded for this deal [CRM.View_And_Manage_Sales_Executivies]



3. Explanation

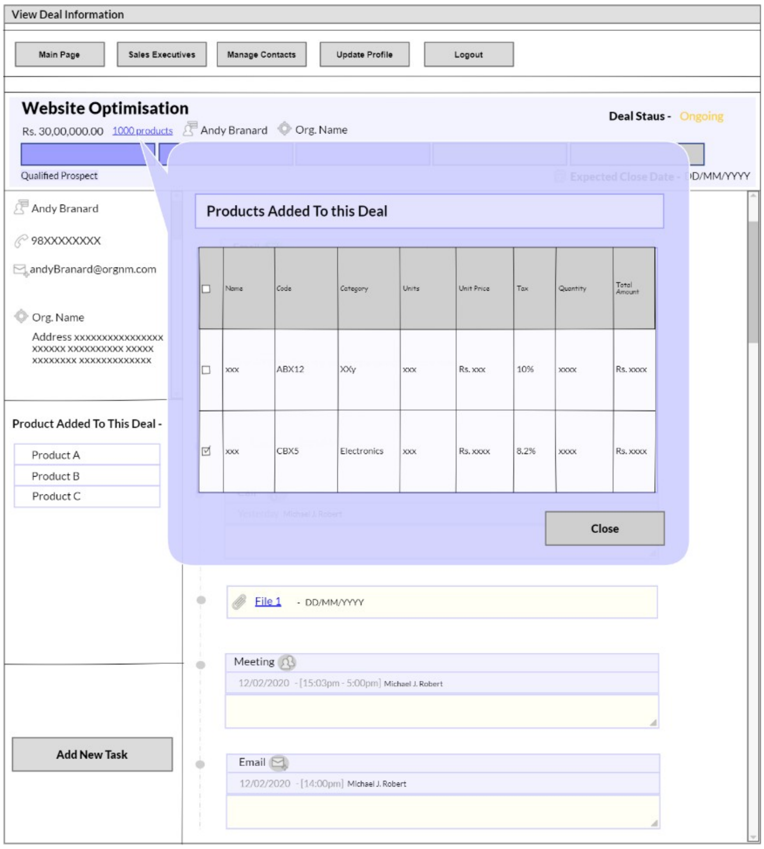
The Sales Manager click on any file link displayed in the 'View Deal Details' page then the file is displayed on the same page.

The file link is passed to the 'Load File' method through 'Entry To View File' entry point using 'file link' and' get file link' data node. But the deal Id for a file is also given 'Load File' method using 'deal id to load deal' data node. The load file will retrieve the file from the database and display it on the 'View Deal Details' page using the 'file' data node.

1.2g View Added Products

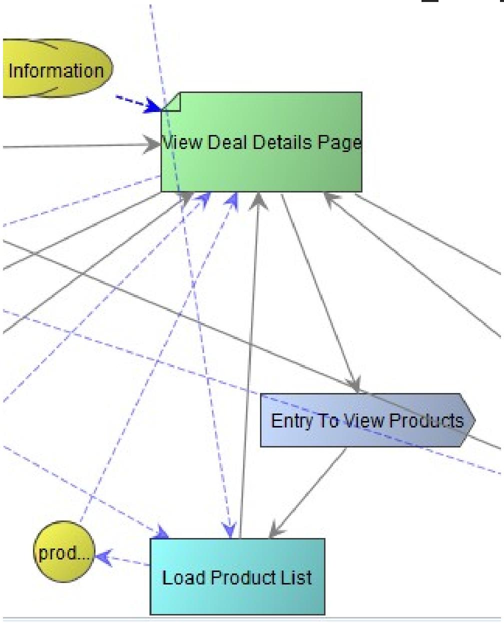
1. Wireframe

Fig 1.1 View Deal Details Page [CRM.View_And_Manage_Sales_Executivies]



1. Screenshot of Flow

Fig 1.1 View Products Added To Deal [CRM.View_And_Manage_Sales_Executivies]



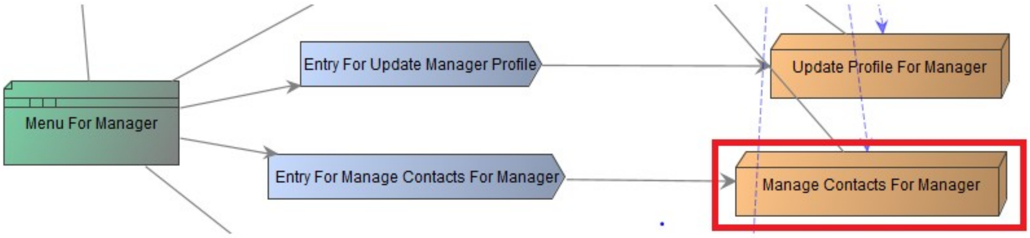
3. Explanation

When the Sales Manager clicks on numbers of product link (here 10000 product) in 'View Deal Details' page the product list is loaded by 'Load Product List' method which is called through 'Entry View Products' entry point and displays the product list added to that deal on 'View Deal Details' page using 'products list' data node.

1.3 Manage Contacts

Screenshot of Flow

Fig. Contacts Subsystem [CRM.Application]



Explanation

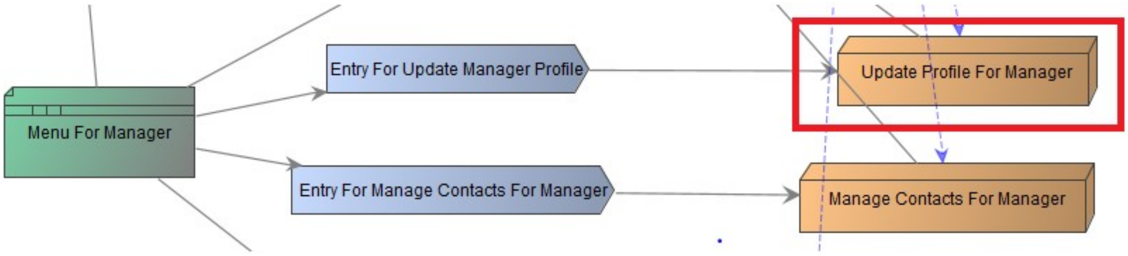
The ‘Contact Subsystem For Manager’ subproject node is linked to ‘CRM.Add_Contacts’ subproject.

By clicking on the Manage Contact’s button in the Menu will lead to Contacts Page [in CRM.Add_Contatcs] through ‘Entry For Contact Page for Manager’ entry point node which is then connected to subsystem. (Refer- [F] MANAGE CONTATCS)

1.4 Update Profile

Screenshot of Flow

Fig. Update Profile Subsystem [CRM.Admin]



Explanation

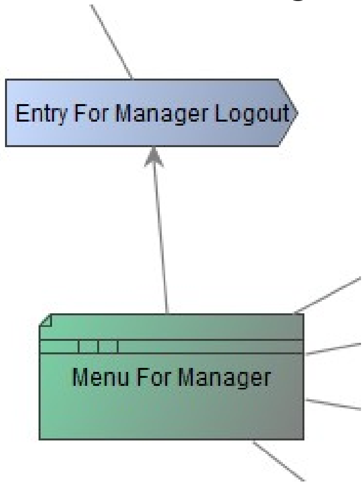
The ‘Update Profile for Manager’ node is linked to ‘CRM.Update_User_Profile’ subproject.

By clicking on the Update Profile button in the Menu it will lead to Update Profile Page [in CRM.Update_User_Profile] through ‘Entry To Update Manager Profile’ entry point node which is then connected to subsystem. (Refer-[E] Update User Profile)

1.5 Logout

Screenshot of Flow

Fig. Logout Entry [CRM.Application]



Explanation

After clicking on the ‘Logout’ button on the menu, with the help of the ‘Entry For Manager Logout’, it will lead to the 'Logout' method node (which will help the manager logout of the system) and it will go to the 'login page'.

For ‘Logout’ method (Refer – [A] LOGIN and FORGOT PASSWORD – 1. Login and Logout)

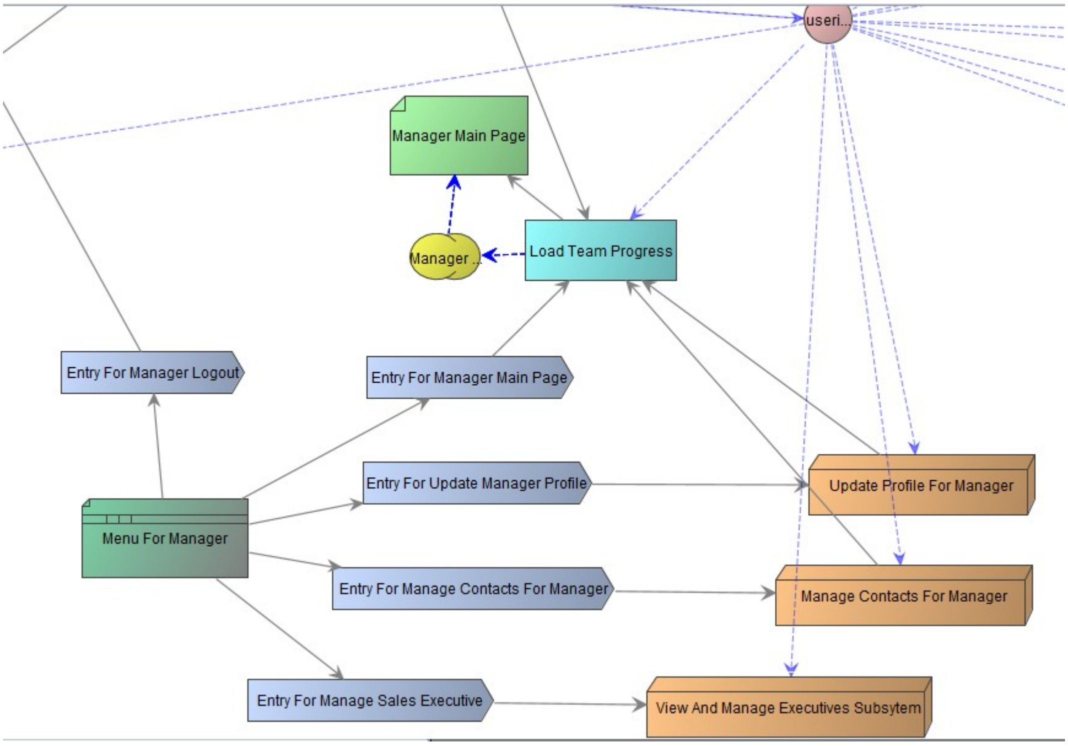
1.6 Menu For Manager

1. Wireframe

Fig 1.1 Menu For Manager [CRM.Application]

2. Screenshot of Flow

Fig 2.1 Menu [CRM.Application]



3. Explanation

The Menu For Manager and perform the following actions:

- Main page: By Clicking on ‘Main Page’ in the menu the control will go to ’Manager Main Page’ through ‘Entry For Manager Main Page’ entry point (Refer- 1. Main Page for Manager)
- Sales Executive: By clicking on ‘Sales Executive’ in the menu the control will go to ‘View and Manage Executives Subsystem’ through ‘Entry For Manage Sales Executive’ entry point. (Refer- 1.2 View Sales Executive)

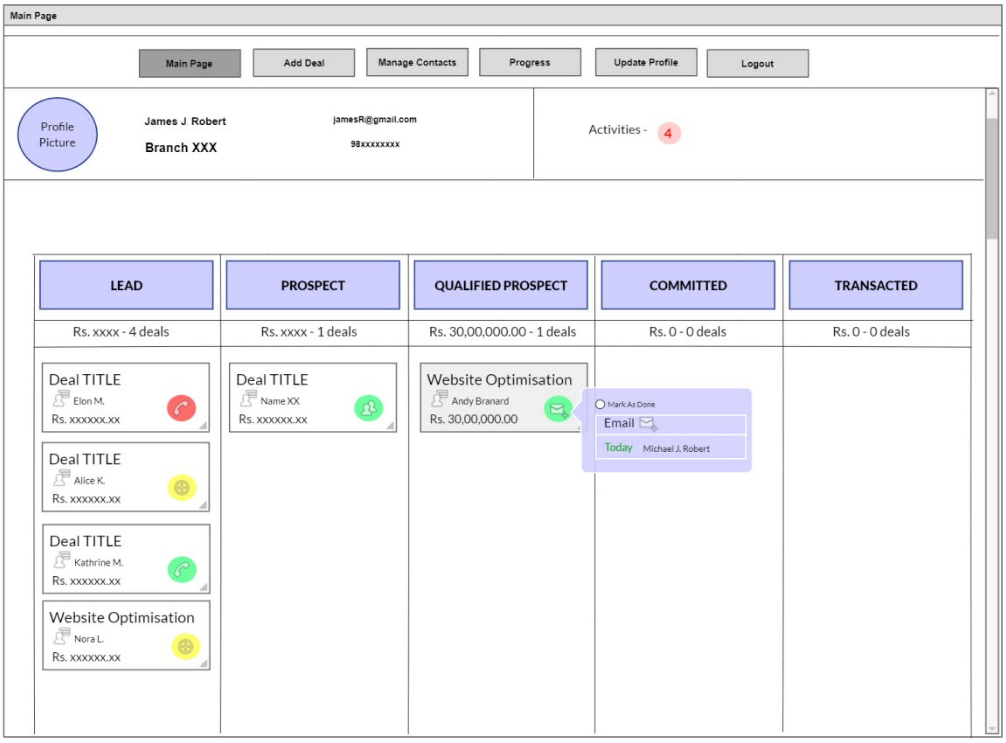
- Manage Contacts: By clicking on ‘Manage Contact’ in the menu the control will go to ‘Manage Contact For Manager Subsystem’ through ‘Entry For Manage Contact For Manager’ entrypoint. (Refer- 1.3 Manage Contacts)
- Update Profile: By clicking ‘Update Profile ’in the menu the control will go to ‘Update Profile subsystem’ through ‘Entry For Update Manager Profile’ entry point.(Refer – 1.4 Update Profile)
- Logout: By clicking ‘Logout’ in the menu.(Refer- 1.5 Logout)

[D] SALES EXECUTIVE

1. Main Page for Sales Executive

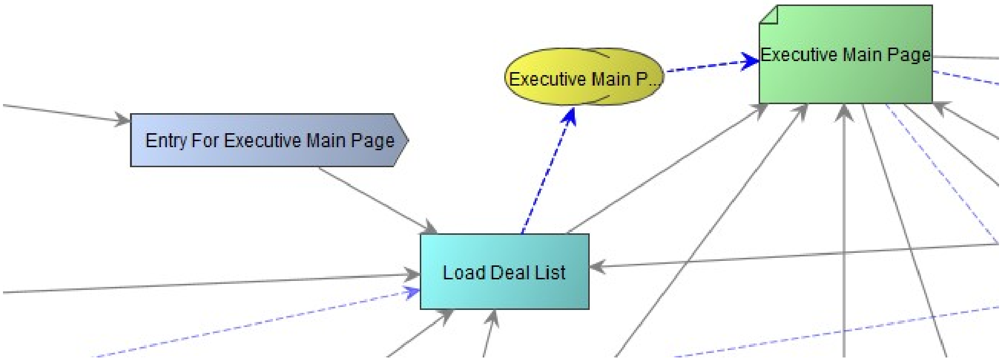
1. Wireframe

Fig 1.1 Executive Main Page [CRM.Application]



2. Screenshot of Flow

Fig 2.1 Main Page [CRM.Application]



3. Explanation

The main page of the Sales Executive will display a list of deals in pipeline stages. It also displays information like a total no. of upcoming and delayed activities on the top(activities- 4), total no of deals at each pipeline stage (4 deals in lead, 1deals in prospect, etc) and the total value of each pipeline stage(Rs. xxxx in lead, Rs. xxxx in prospect, Rs.30,00,00,000 in qualified prospect, etc). The main page also displays the user's profile information like name, email, mobile no, branch and profile picture. All this information is loaded by the 'Load Sales Executive Main Page' method.

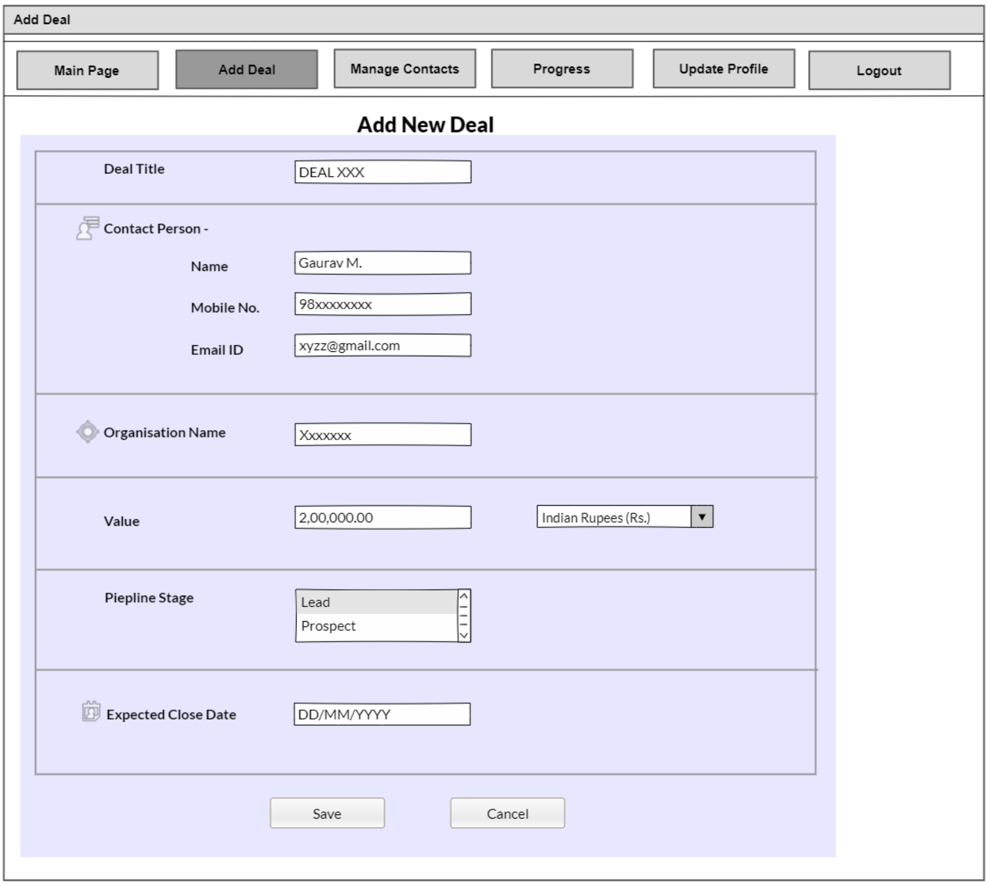
The Executive Main Page for Sales Executive can perform the following actions:

- View Deal – By double clicking on any deal on the main page in the menu, will lead to ‘View Deal Subsystem’ through ‘Entry For View Deal Page’ entry point. The ‘View Deal’ subsystem is linked to CRM. View_Deal subproject. (Refer – 1.3 View Deal Information).
- Set Activity Status – By clicking on button in the menu ‘Mark as done’ in the main page, will lead to ‘Entry For Set Activity Status’ entry point. (Refer – 1.4 Set Activity Status Directly).
- Finish Activity – (Refer – 1.5 Finish Activity).

1.2 Add New Deal

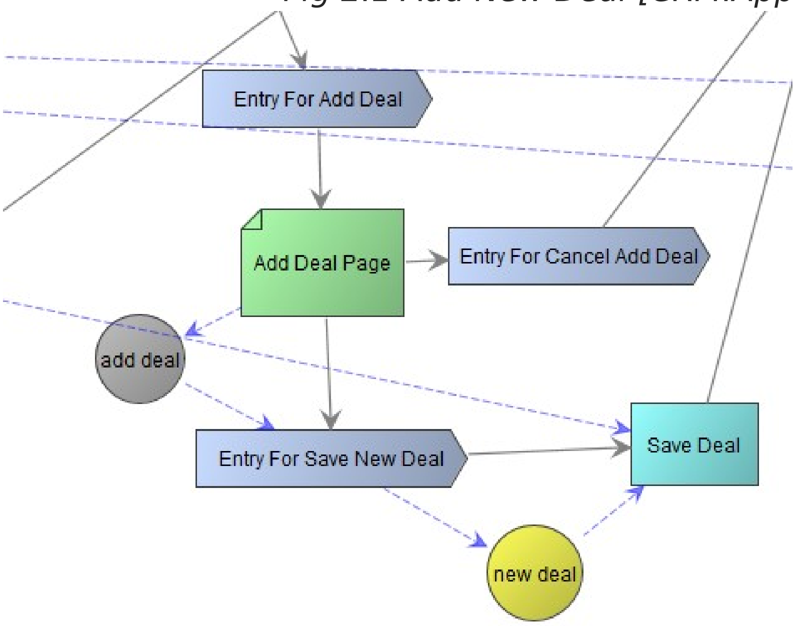
1. Wireframe

Fig 1.1 Add Deal Page [CRM.Application]



2. Screenshot of Flow

Fig 2.1 Add New Deal [CRM.Application]



3. Explanation

When the user clicks on the Add New deal button on the menu, the control will come to 'Add Deal Page' where the user can enter deal information like Deal title, Contact information, etc, and save it. When the user clicks on the Save button the control will go to 'Entry For Save New Deal' entry point and goes to 'Save Deal Method' which will save all deal details in the database. The information is carried by 'add deal' and 'new deal' data nodes.

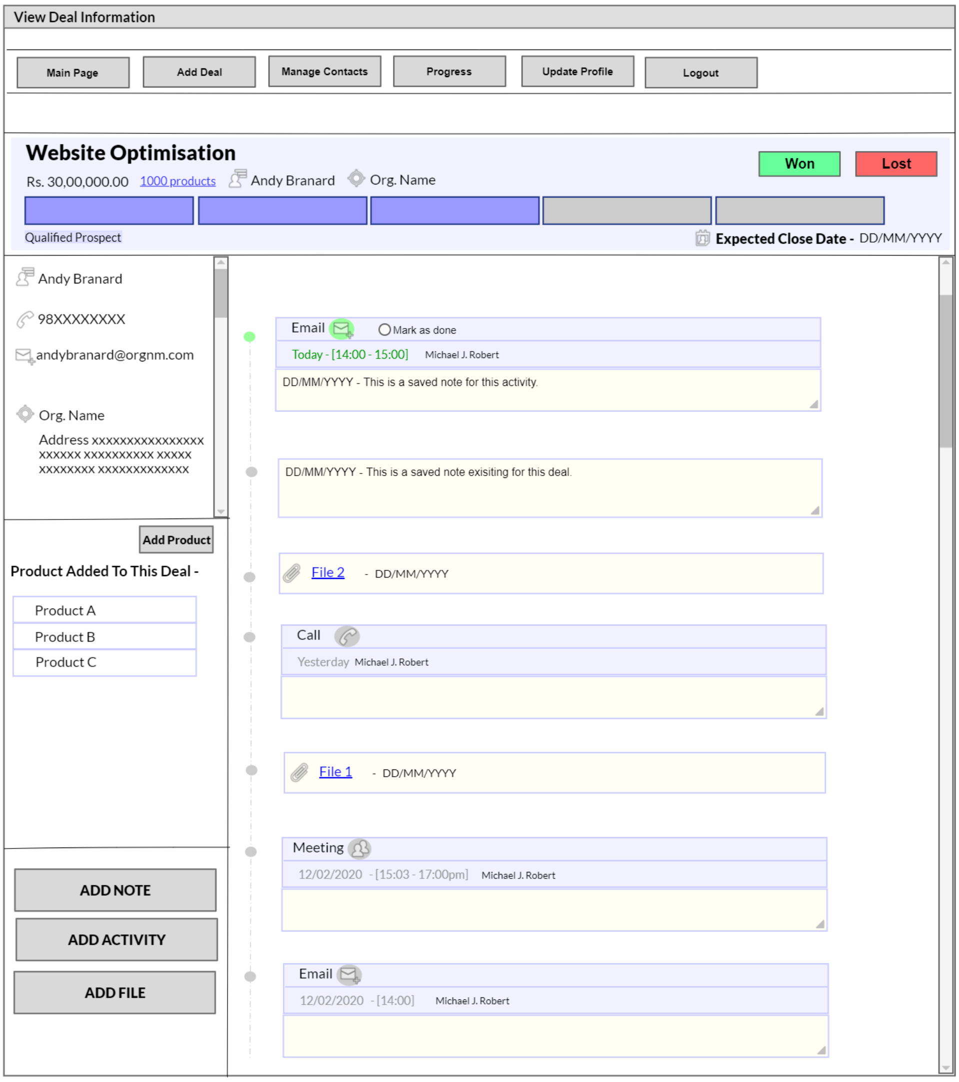
The Add Deal Page for Sales Executive can perform the following actions:

- Save – By clicking on Save button on ‘Add New Deal’ Page will save the entered deal details.
- Cancel – By clicking on Cancel button on ‘Add New Deal’ Page will lead the user back to main page through ‘Entry For Cancel Add Deal’ entry point.

1.3 View Deal Information

1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig2.1 View Deal Subproject Node[CRM.Application]

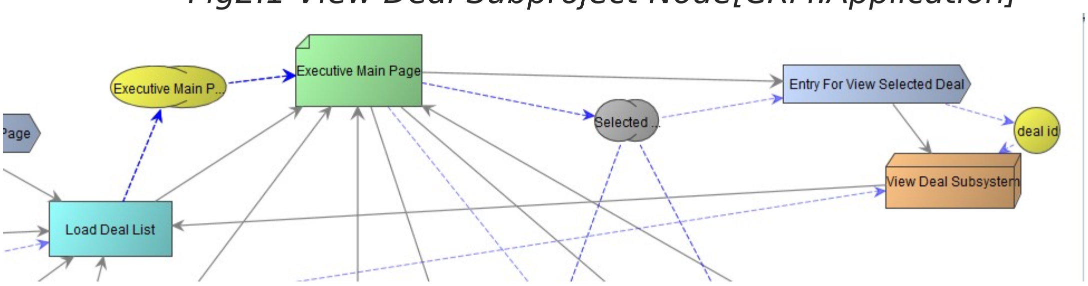
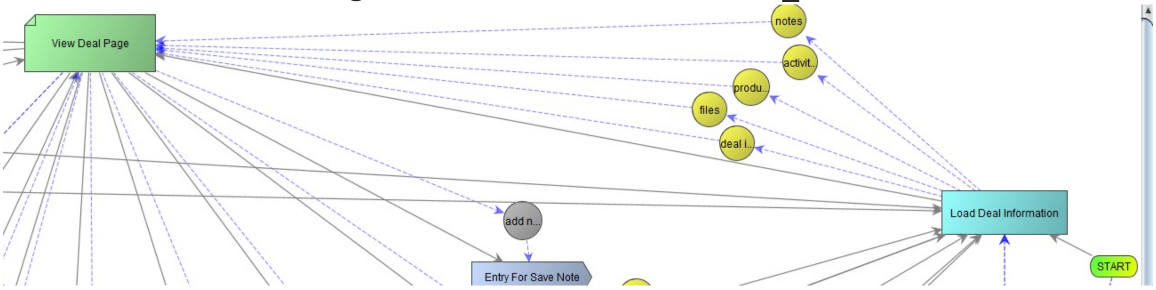


Fig 2.2 View Deal [CRM.View_Deal]



3. Explanation

When the user double clicks on any deal the control goes to the 'View deal' subsystem, which is linked to CRM.View_Deal subproject. The selected deal Id is sent to the subsystem using 'Selected Deal.deal id for a selected deal' and 'deal id' data nodes.

In CRM.View_Deal subproject the control starts from 'start' node and go to 'Load Deal List' and display deal-related information, no of products, List of nodes, List of activities, List of File link using 'deal information', 'products', 'notes', 'activities', 'files' data nodes. All this information is displayed on 'View Deal Page'.

The View Deal Page for Sales Executive can perform the following actions:

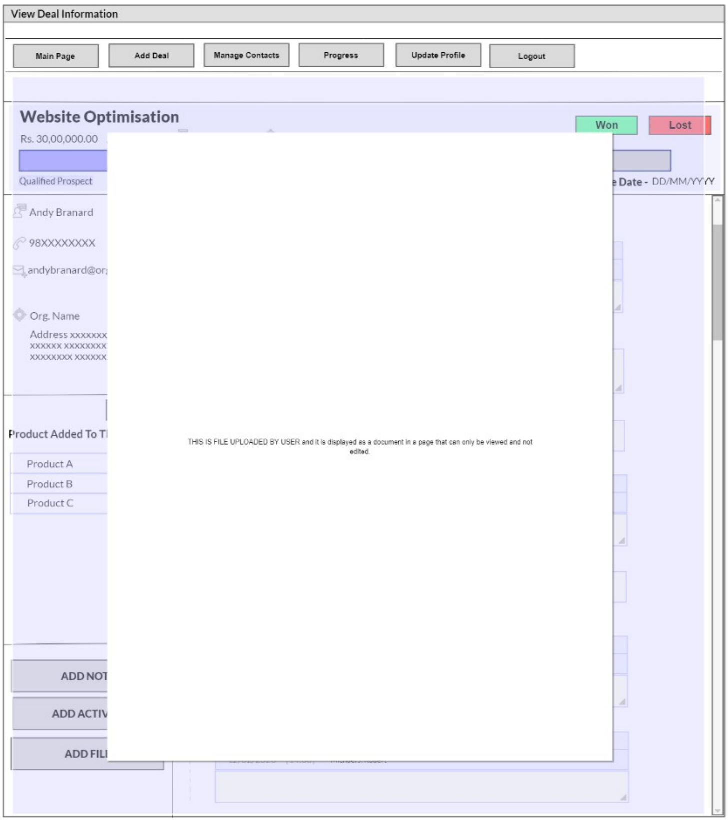
- Add Notes – By clicking on Add Note button on 'View Deal Page'. (Refer – 1.3e Add Notes)
- Add Activity – By clicking on Add Activity button on 'View Deal Page'.(Refer – 1.3f Add Activity)
- Add File – By clicking on Add File button on 'View Deal Page'.(Refer – 1.3g Add File)
- Add Product – By clicking on Add Product button on 'View Deal Page' the control goes to 'Add Item Page' page through 'Entry For Add Item' entry point.(Refer – 1.3c Add Product To Deal)
- Set Deal Status – By clicking on Won button or Lost button on 'View Deal Page', the deal status will be set with a comment.(Refer – 1.3j Set Deal Status)
- Set Activity Status – By selecting 'mark as done' radio button for upcoming activities on 'View Deal Page', the activity status will be set.(Refer – 1.3i Set Activity Status)
- Set Pipeline Stage – By selecting the pipeline stage indicating bar for deal on 'View Deal Page', the pipeline stage can be set.(Refer – 1.3h Set Pipeline Stage)
- View File –By clicking on File link displayed on 'View Deal Page', the user can view file.(Refer – 1.3aView File)

- View Detailed Products List – By double-clicking on list of products displayed on ‘View Deal Page’, the user can view detailed products information added to the deal.(Refer – 1.3b View Products Added To Deal)
- Complete Activity - By selecting an upcoming activity on ‘View Deal Page’, the activity status will be set.(Refer – 1.3k Complete Activity)

1.3a View File

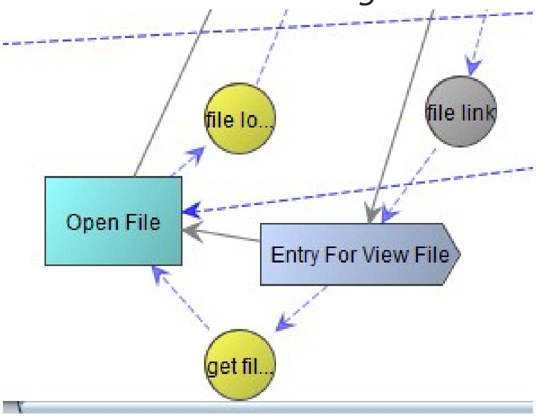
1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 View File [CRM.View_Deal]



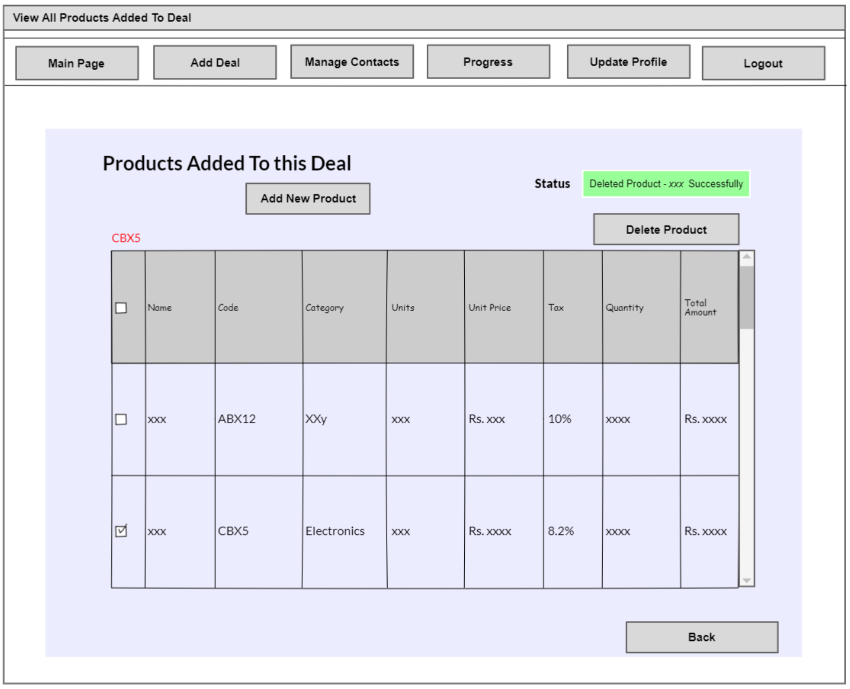
3. Explanation

When a user clicks on any file name in 'View Deal Page' the file link is passed to 'Open File Method' using 'file link' and 'get file link' data node through 'Entry For View File ‘entry point. The method will retrieve the file and display it on the 'View Deal Page’ using a 'file loaded' data node.

1.3b View Products Added To Deal

1. Wireframe

Fig 1.1 List of Products Page [CRM.Product_Added_To_Deal]



2. Screenshot of Flow

Fig 2.1 Products Added To Deal Subproject [CRM.View_Deal]

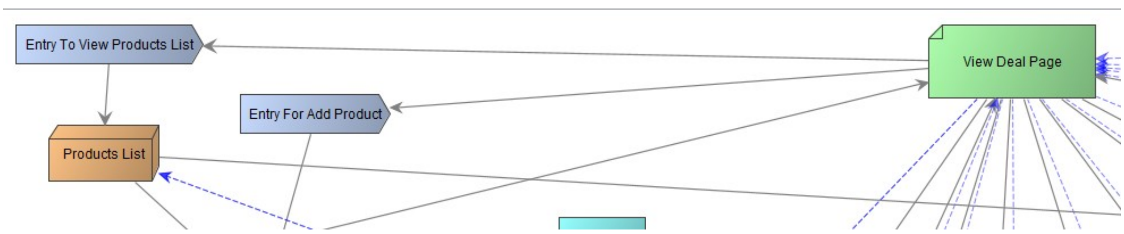
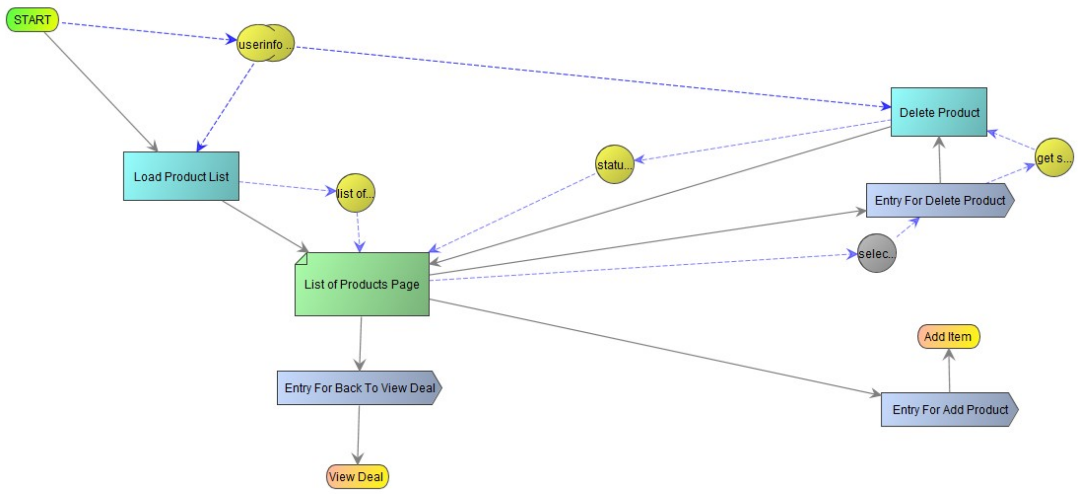


Fig 2.2 List of Products Page [CRM.Product_Added_ToDeal]



3. Explanation

When the Sales Executive double-clicks on list of products displayed on the 'View Deal' page, the control will go to 'Entry To View Products List' entry point and then go to 'Product List Subsystem' node. This subsystem is linked to CRM.Product_Added_To_Deal subproject.

In CRM.Product_Added_To_Deal subproject the product list is loaded by the 'Load Product List' which will load the product details and displays the product list added to that deal on 'List of Products' page using 'list of products added to this deal' data node.

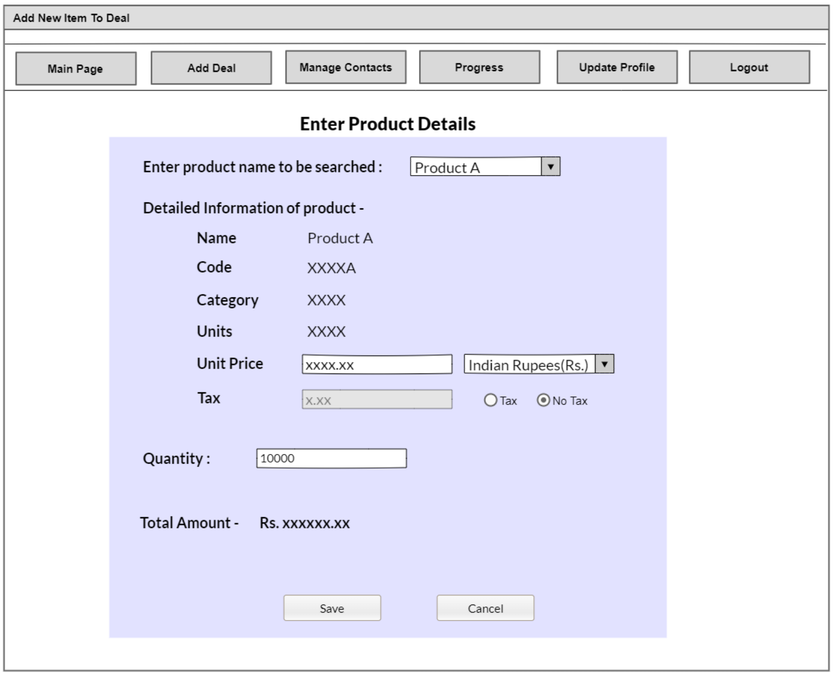
The Products To Deal Page for Sales Executive can perform the following actions:

- Add Product – By clicking on Add New Product button on ‘Products To Deal’ Page will lead to ‘Entry For Add Product’ entry point and ‘Add Item ’ finish node.(Refer – 1.3c Add Product To Deal)
- Delete Product – By clicking on Delete Product button on ‘View Deal Page’ after selecting products will delete products.(Refer – 1.3d Delete Existing Product)
- Back To View Deal – By clicking on Back button on ‘Products To Deal’ Page the user will be lead back to View Deal Page in CRM.View_Deal through ‘Entry Point For Back’ entry point connected to ‘View Deal Page’ finish node.

1.3c Add Product to Deal

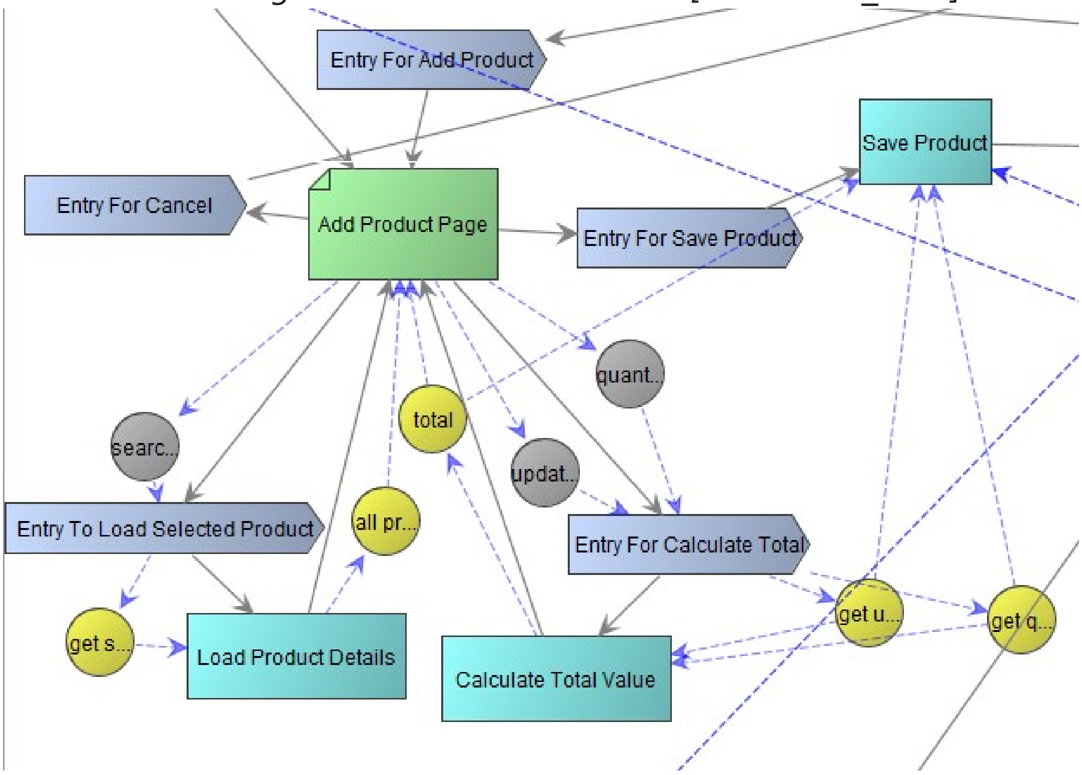
1. Wireframe

Fig 1.1 Add Product Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 Add Product To Deal[CRM.View_Deal]



3. Explanation

In 'Add Product Page' the user can search the product added in this deal by entering the product name. This product name is given to the 'Load Product details' using 'search product' and 'get search product' data nodes through 'Entry to Load Selected Product' entry point. The method will search and load all product details existing for that product and display it on 'Add Product Page'.

The user can add the number of products and update possible product details which will then be given to the 'Calculate Total Value' method, which will calculate the total amount and display it on 'Add Product Page'. The number of products and updated product details are passed using ‘quantity’, ‘updated product details’ and ‘get quantity’, ‘get updated product details’ through 'Entry For Calculate Total' entry point.

When the user clicks on the saves button all the information is saved into the database using the 'Save Product Method' through' Entry For Save Product' entry point.

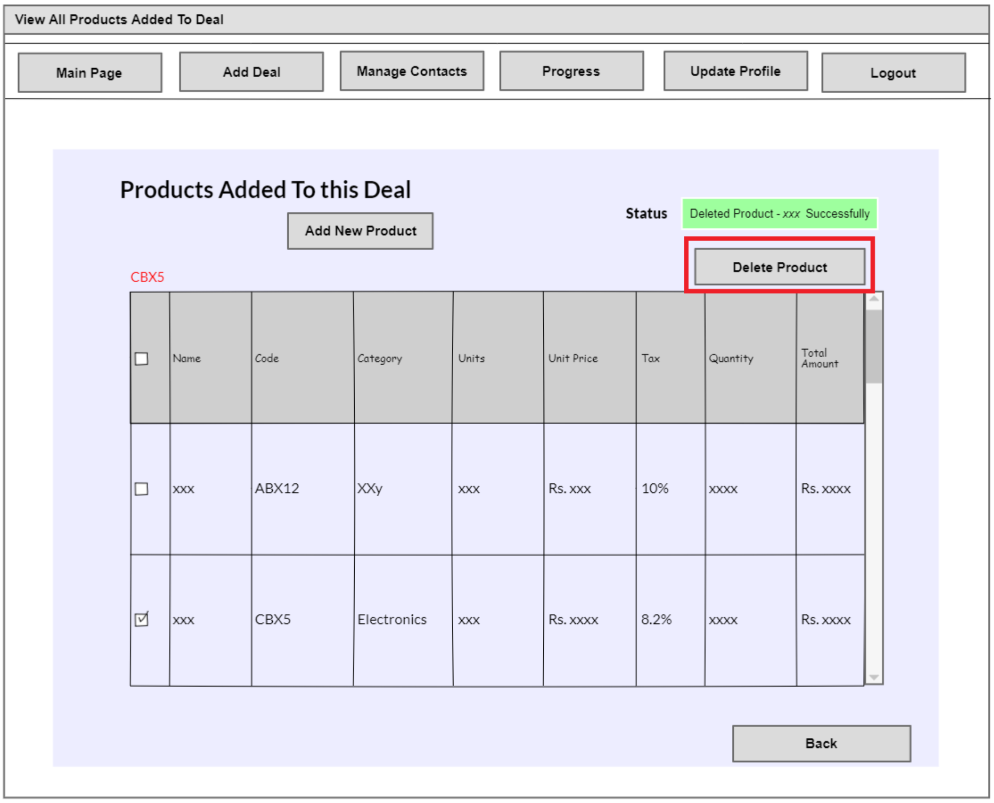
The Add Item Page for Sales Executive can perform the following actions:

- Save – By clicking on Save button on ‘Add Item Page’, will save the entered product details.
- Cancel – By clicking on Cancel button on ‘Add Item Page’ will lead the user back to View Deal page through ‘Entry For Cancel’ entry point.

1.3d Delete Existing Product

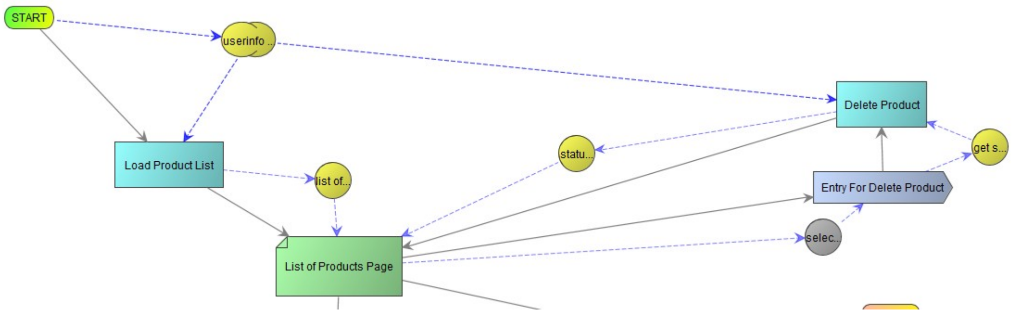
1. Wireframe

Fig 1.1 List ofProducts Page[CRM.Product_Added_To_Deal]



2. Screenshot of Flow

Fig 2.1 Delete Products To Deal [CRM.Product_Added_To_Deal]



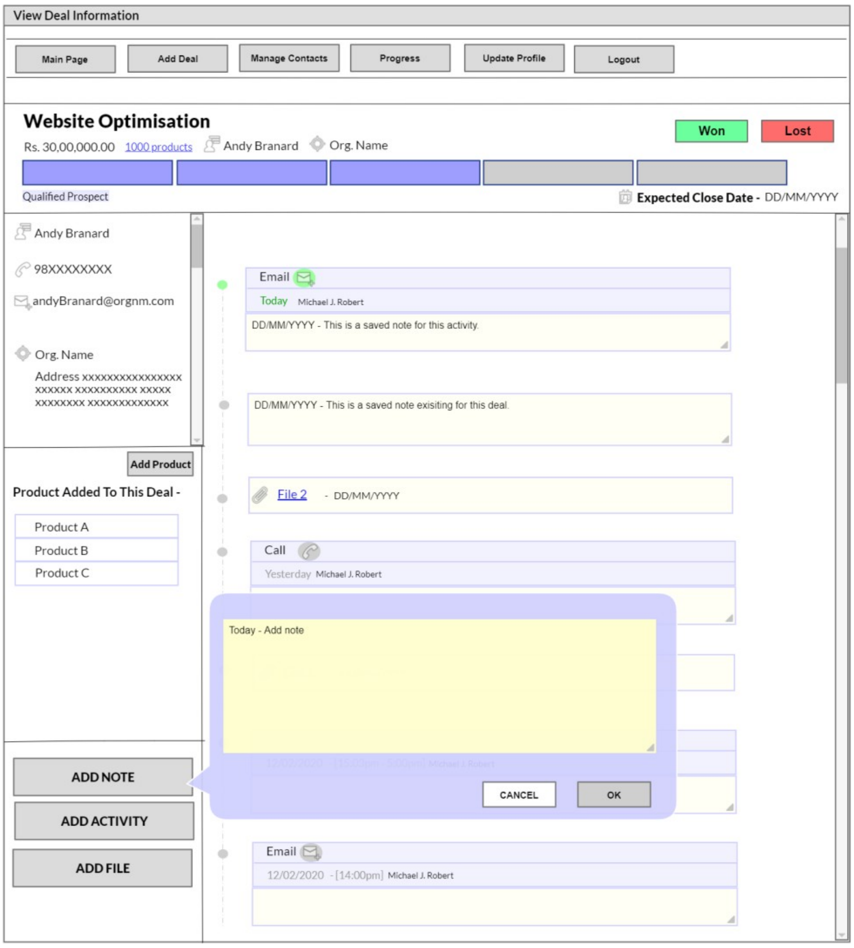
3. Explanation

When the user clicks on the delete button in 'List of Products' page after selecting the products to be deleted from the list, the control will go to 'Delete Product' method through 'Entry Delete Product' entry point, where the method will delete those products for that deal and the status of deletion is displayed on 'List of Products’ page using ‘status of deletion’ data node. The list of selected product codes are sent to the method using ‘selected products’ and ‘get selected products’ data nodes.

1.3e Add Notes

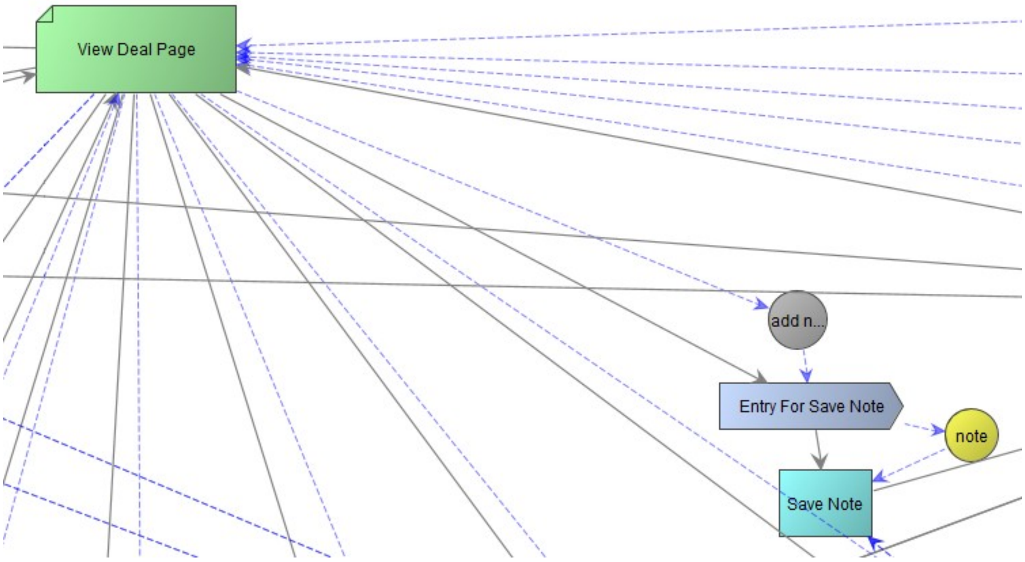
1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 Add Note To a Deal [CRM.View_Deal]



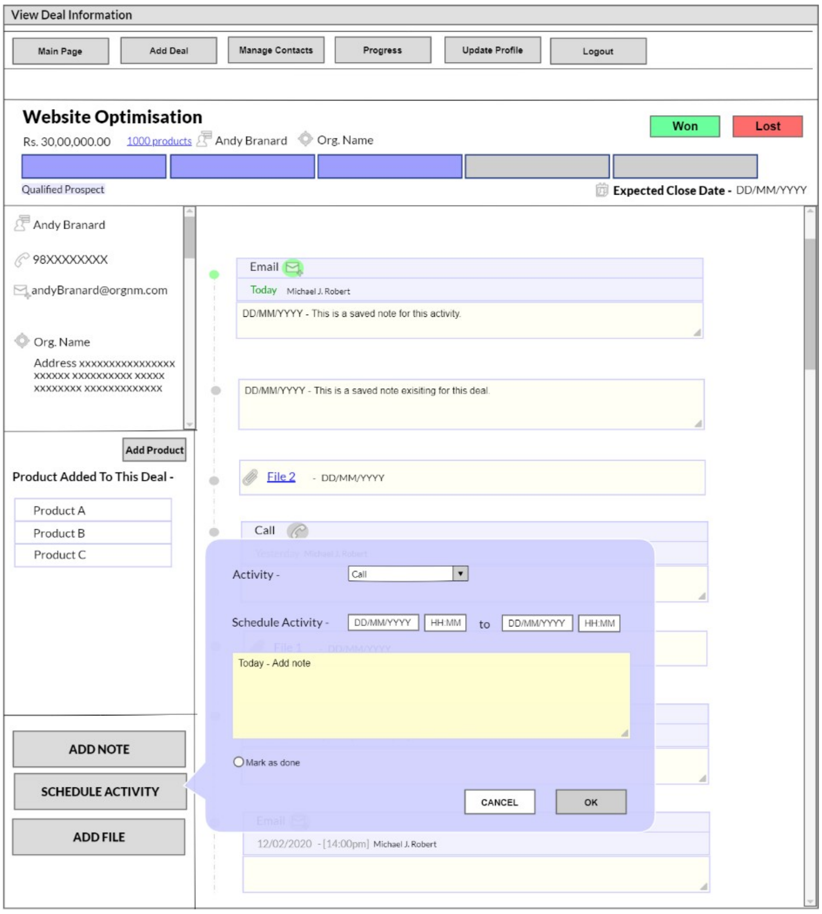
3. Explanation

When the user clicks on the Add Note button in 'View Deal Page' the user can add a note for that deal to save using the 'Save Notes Method'. The note is passed to the method using 'add note' and ‘note’ data nodes through 'Entry For Save Notes' entry point.

1.3f Add Activity

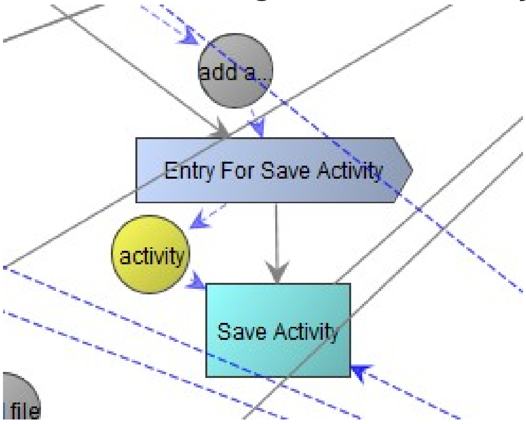
1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 Add Activity to a Deal [CRM.View_Deal]



3. Explanation

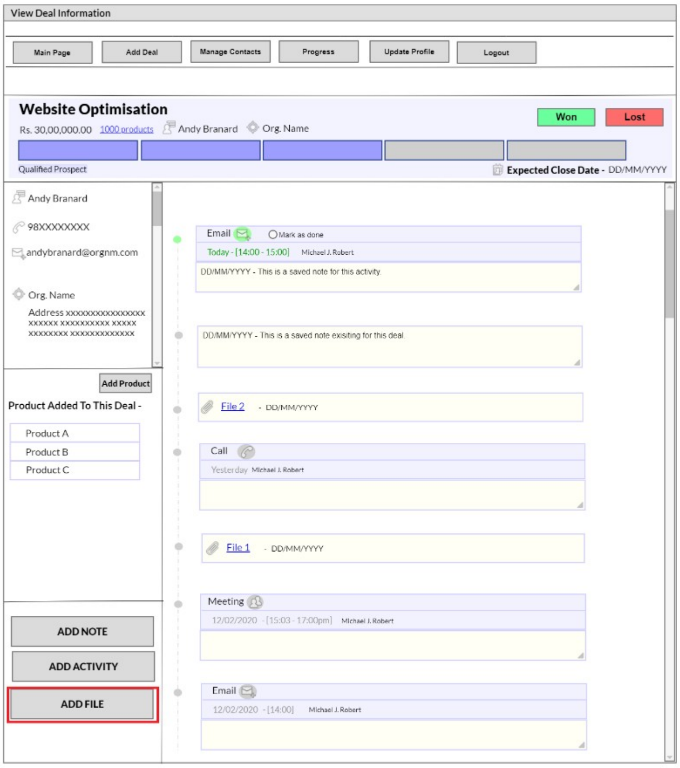
When the user clicks on the Add Activity button in 'View Deal Page' the user can add an activity for that deal to save using the ‘Save Activity’ Method. Activity details like – activity type [call, email or meeting] using drop down list, schedule activity [to and from date and time] and note (if needed) has entered in the page for that deal. The activity is passed to the method using 'add activity' and ‘activity’ data nodes through 'Entry For Save Activities' entry point.

By setting mark as done will set the activity as done.

1.3g Add File

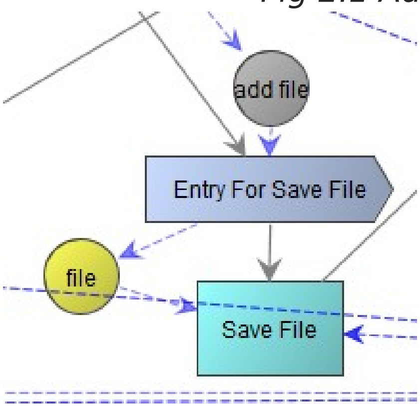
1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 Add File to a Deal [CRM.View_Deal]



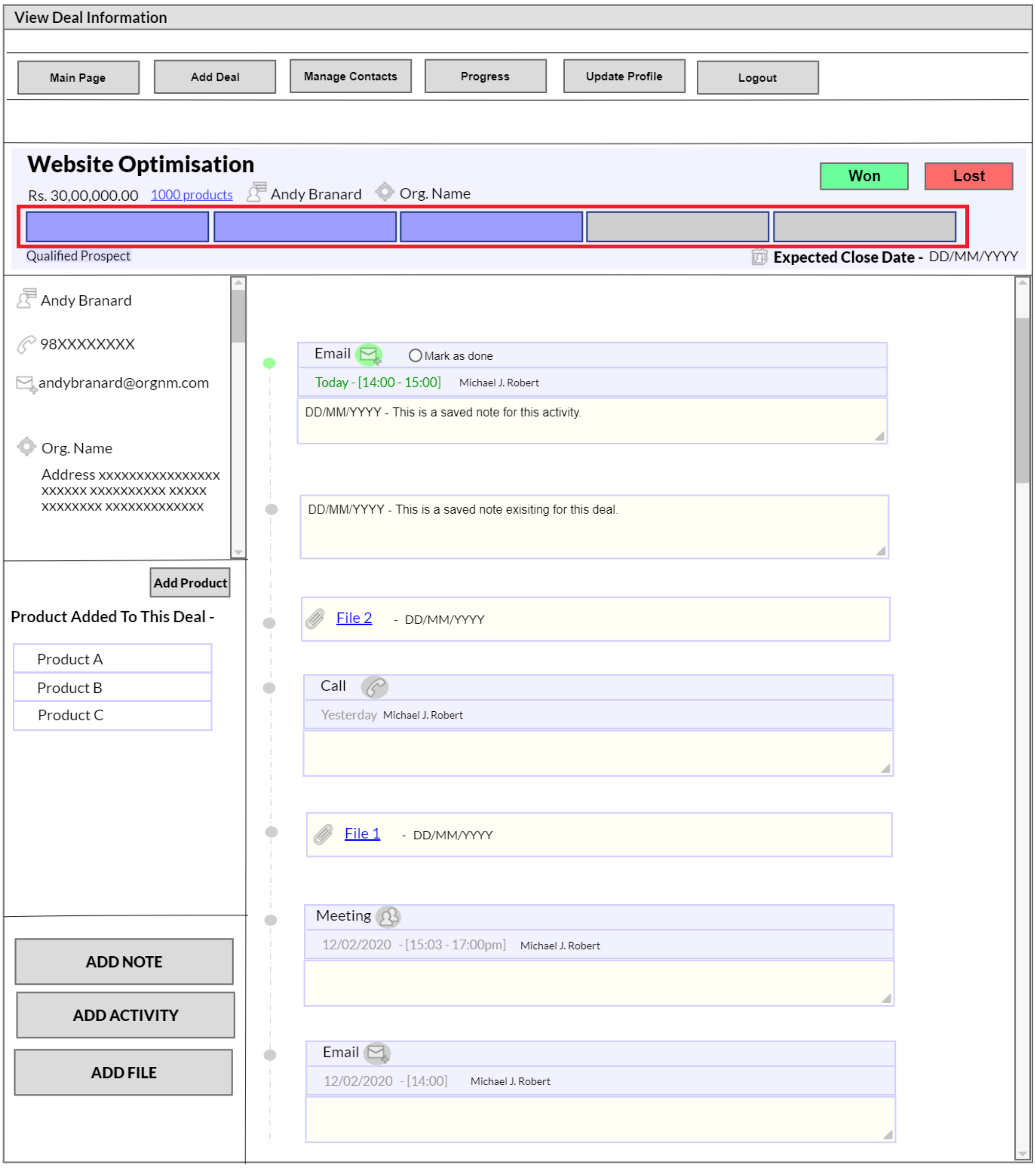
3. Explanation

When the user clicks on the Add File button in 'View Deal Page' the user can upload a file for that deal and then save using the 'Save File ’Method. The file is passed to the method using 'add file' and ‘file’ data nodes through 'Entry For Save File' entry point.

1.3h Set Pipeline Stage

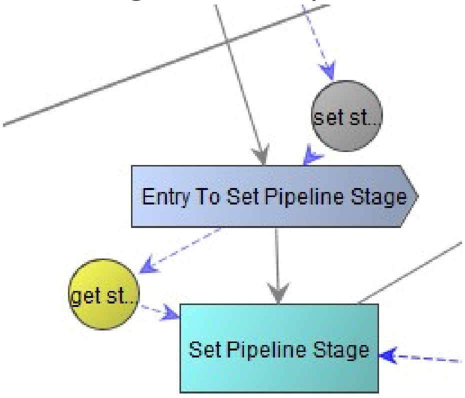
1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 Set Pipeline stage to an existing Deal [CRM.View_Deal]



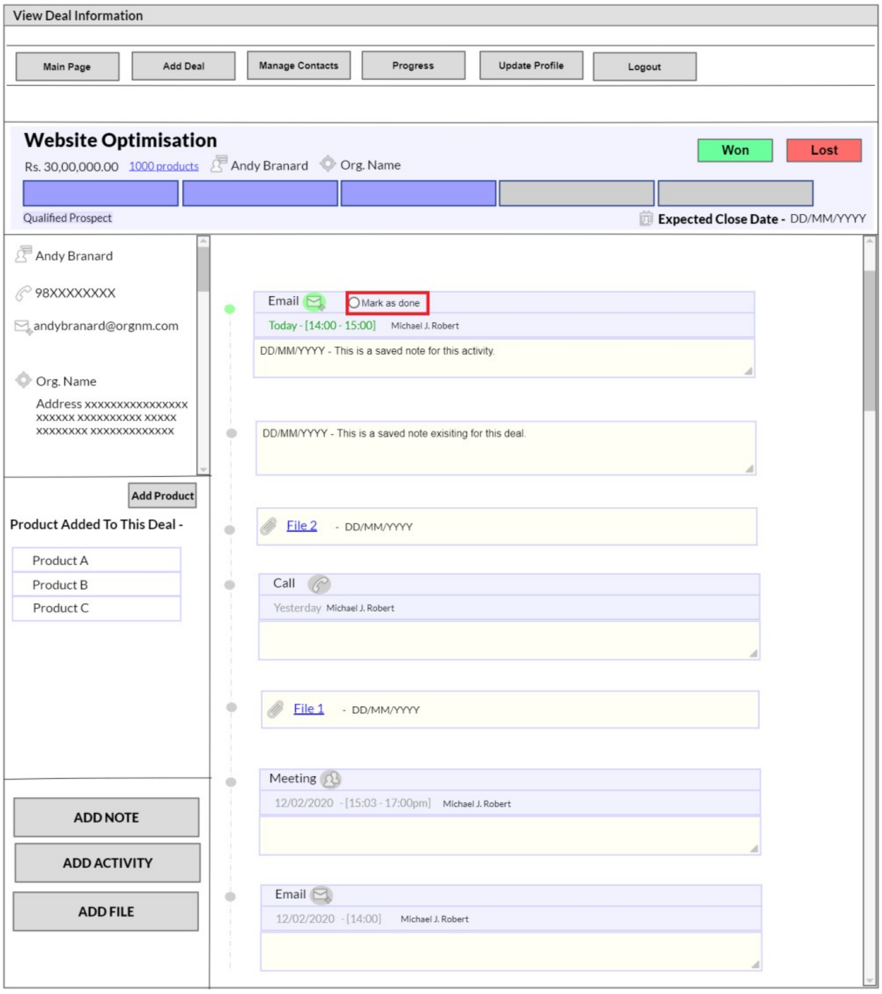
3. Explanation

The user can set the pipeline of that deal, and this is saved using the 'Set Pipeline Stage Method'. The stage is passed through 'Entry To Set Pipeline Stage' entry point using 'set stage' and 'get stage' data nodes.

1.3i Set Activity Status

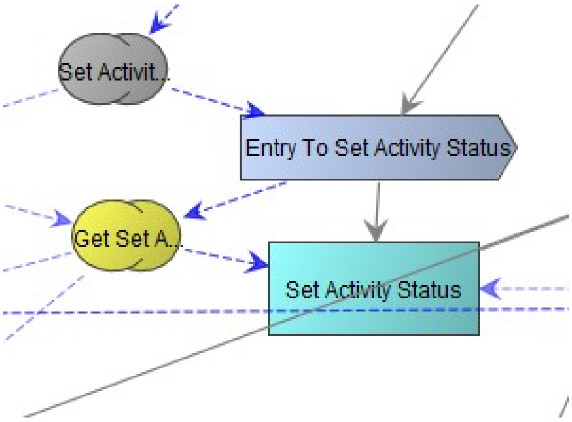
1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 Set Activity Status for an existing Deal and upcoming activity [CRM.View_Deal]



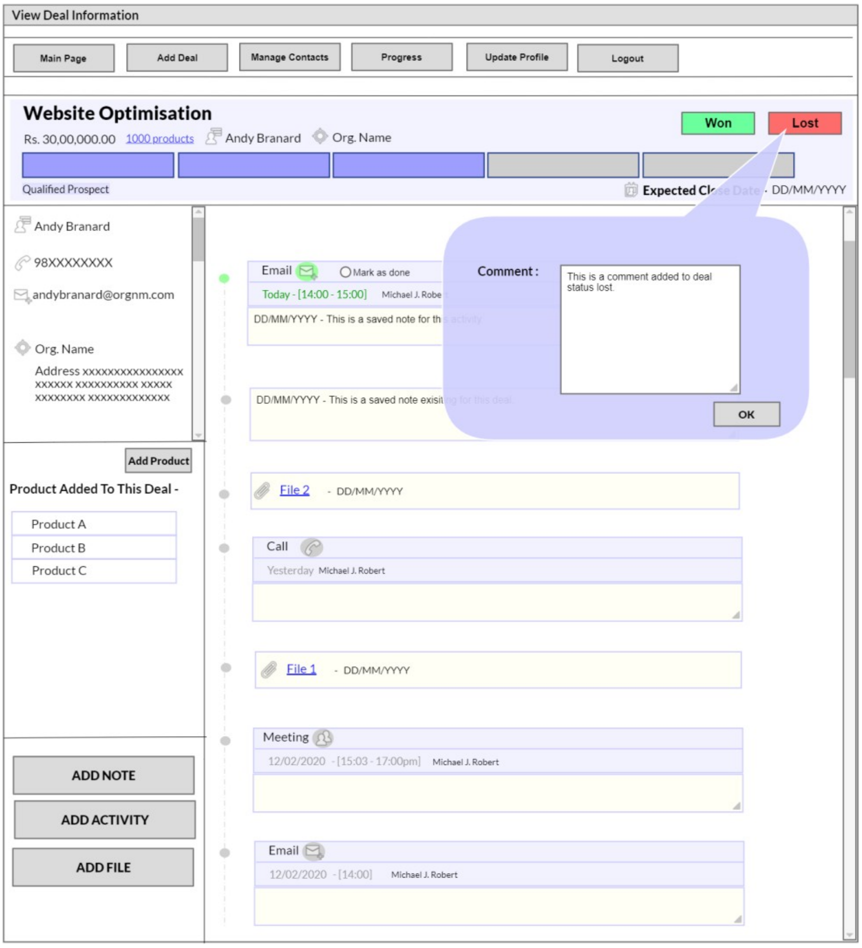
3. Explanation

By clicking on button ‘Mark as done’ in the ‘View Deal Page’, which will lead to ‘Set Activity Status ’ method through ‘Entry To Set Activity Status’ entry point. The Activity Id and Activity status is sent to the ‘Set Activity Status’ method using ‘Set Activity Status Data ‘and ‘Get Set Activity Status Data’ group data nodes. The ‘Set Activity Status’ method will set the activity status as done.

1.3j Set Deal Status

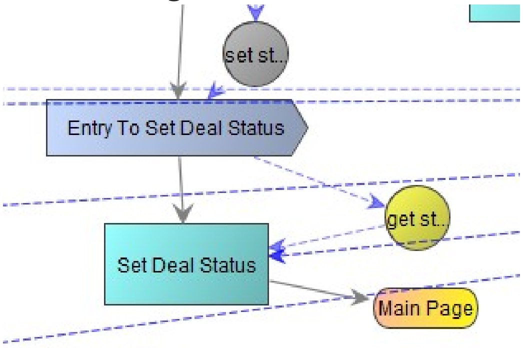
1. Wireframe

Fig 1.1 View Deal Page [CRM.View_Deal]



2. Screenshot of Flow

Fig 2.1 Set Deal Status for ongoing Deal [CRM.View_Deal]



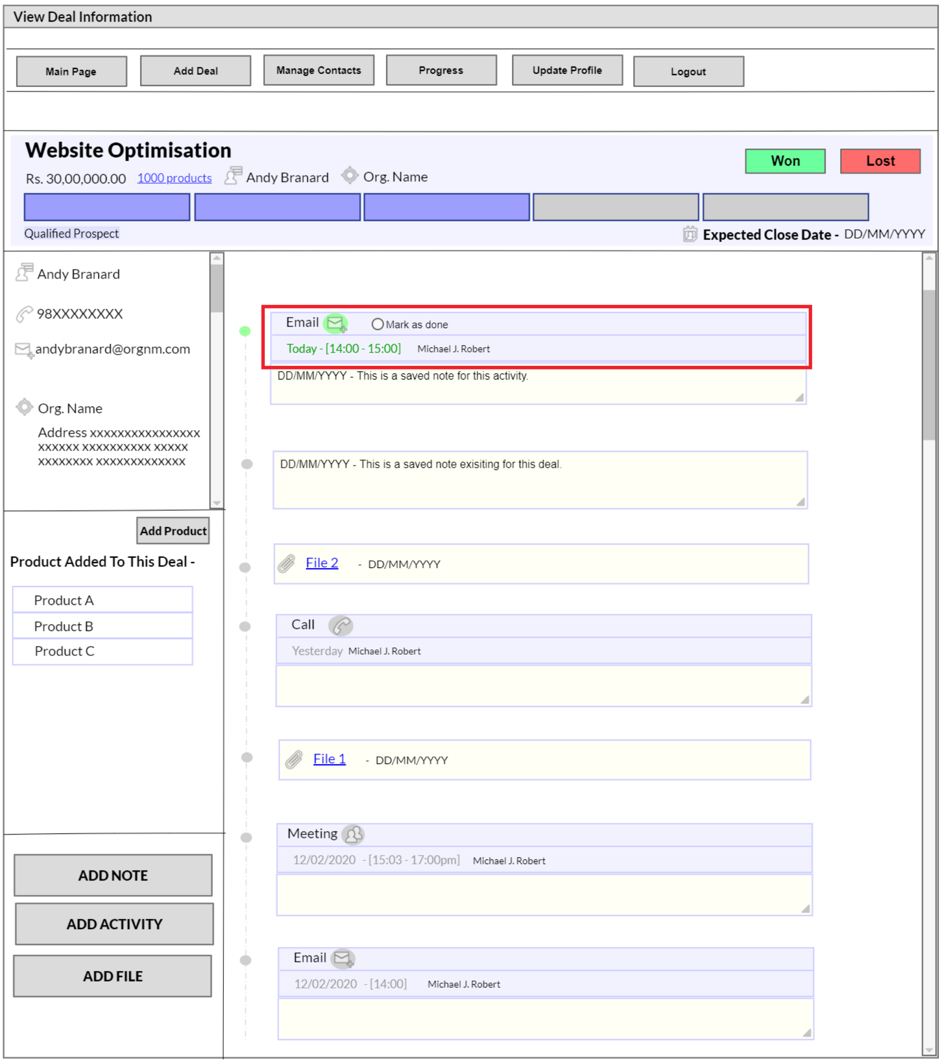
3. Explanation

The user can set the status for that deal (Deal Won or Lost using Won or Lost buttons in View Deal page), and this is saved using the 'Set Deal Status' method. The status is passed through 'Entry To Set Deal Status' entry point using 'set status' and 'get status' data nodes. After the method set the status the control goes to ' Main Page' finish node which will go to Main Page.

1.3k Complete Activity

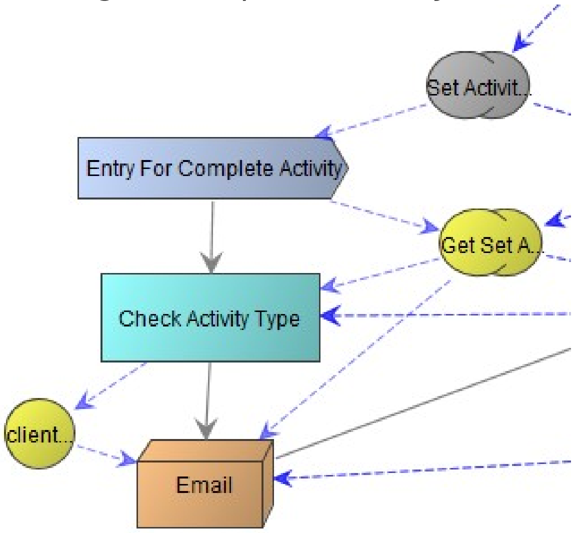
1. Wireframe

Fig 1.1 View Deal Page [CRM.Applicationl]



2. Screenshot of Flow

Fig .1 Complete Activity from View Deal Page [CRM.Application]



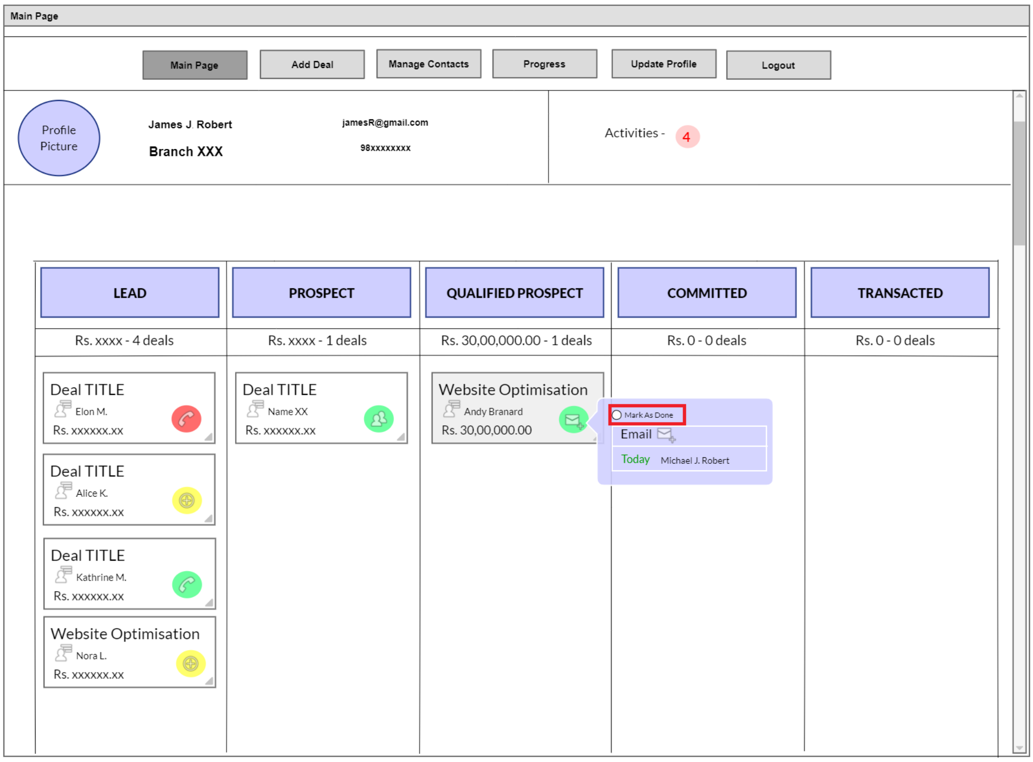
3. Explanation

By clicking on the highlighted box in the wireframe, on the View Deal Page, the user can complete an activity. The control goes to ‘Check Activity Type’ method through ‘Entry For Complete Activity’ entry point, the activity id and deal id is sent to this method using ‘Set Activity Status Data. activity id’, ‘Get Set Activity Status Data.activity id’ and ‘userinfo and deal id.deal id’ group data nodes. The ‘Check Activity Type’ method will check the activity type and give the complete client contact to ‘Email’ subproject node (In this system only email activity can be completed but later call can be added). The ‘Email’ subproject node is linked to CRM.Email subproject.

1.4 Set Activity Status Directly

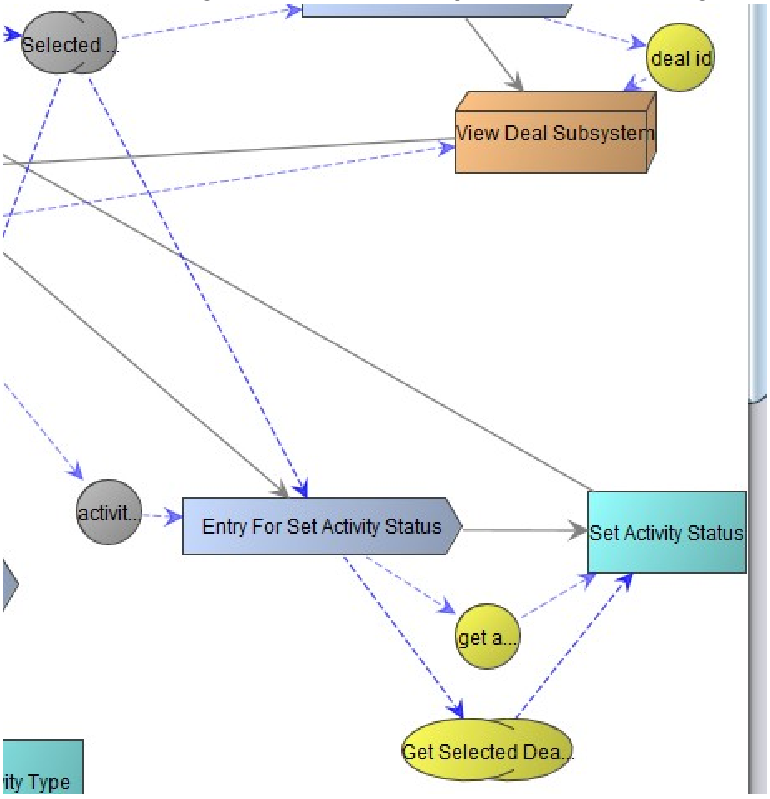
1. Wireframe

Fig 1.1 Executive Main Page [CRM.Applicationl]



2. Screenshot of Flow

Fig 2.1 Set Activity from Main Page [CRM.Application]



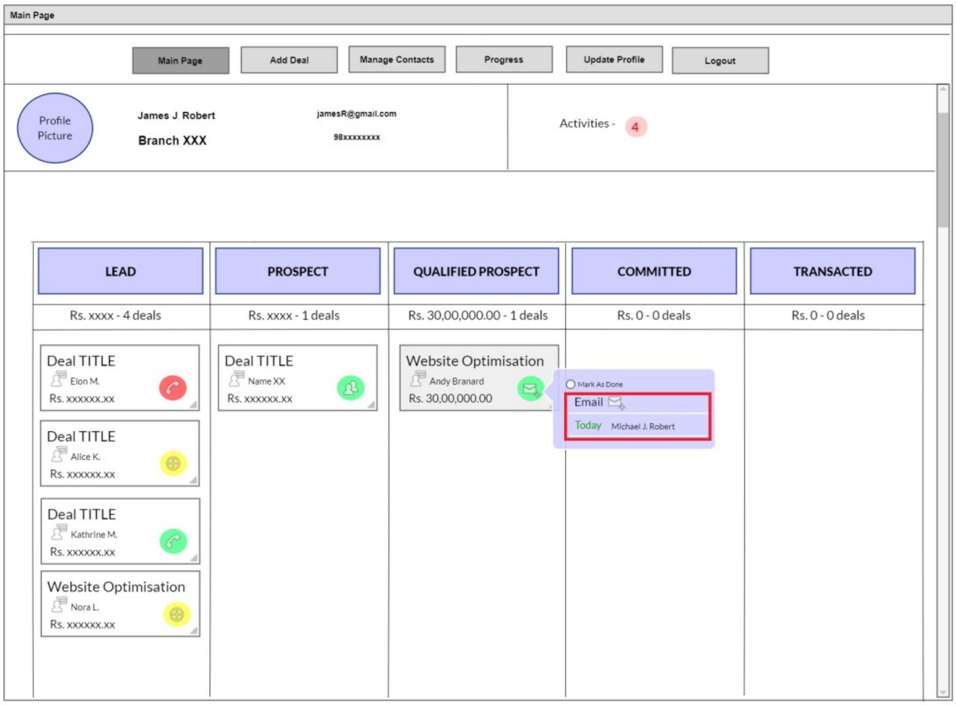
3. Explanation

By clicking on radio button ‘Mark as done’ in the main page for Sales Executive, will lead to ‘Set Activity Status’ method in CRM.Application, through ‘Entry For Set Activity Status’ entry point. The Selected deal Id, Activity Id and Activity status is sent to the method using 'Selected Deal.deal id for selected deal’, ‘Selected Deal.activity id for the selected deal' and 'activity status'data nodes.

1.5 Complete Activity

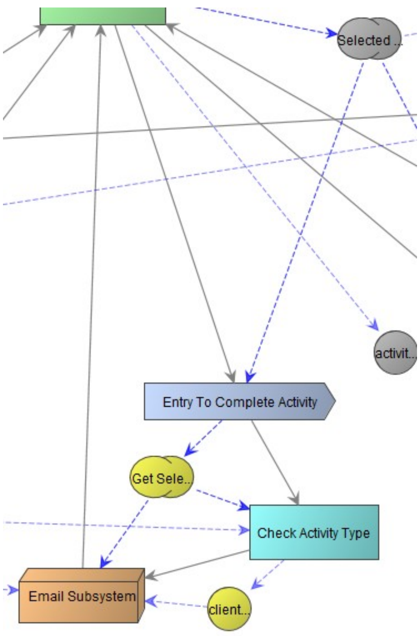
1. Wireframe

Fig 1.1 Executive Main Page [CRM.Application]



2. Screenshot of Flow

Fig 2.1 Set Activity after completing activity (only email) from Main Page [CRM.Application]



3. Explanation

By clicking the box highlighted in the wireframe the control will go to 'Check Activity Type' method through 'Entry To Complete Activity ‘entry point. This method will check the activity type and if the activity is email the control will go to the 'Email' subproject node and this node is linked to CRM.Email subproject. The 'deal Id' and the 'activity Id' is sent to 'Check Activity Type Method' using 'Get Selected Deal For Setting Status After Finish Activity' and 'Selected Deal' group data nodes. 'Check Activity Type Method' will give the complete client contact to the subproject node

1.6 Email Subproject

1.Wireframes

Fig 1.1 Compose Email Page [CRM.Email]

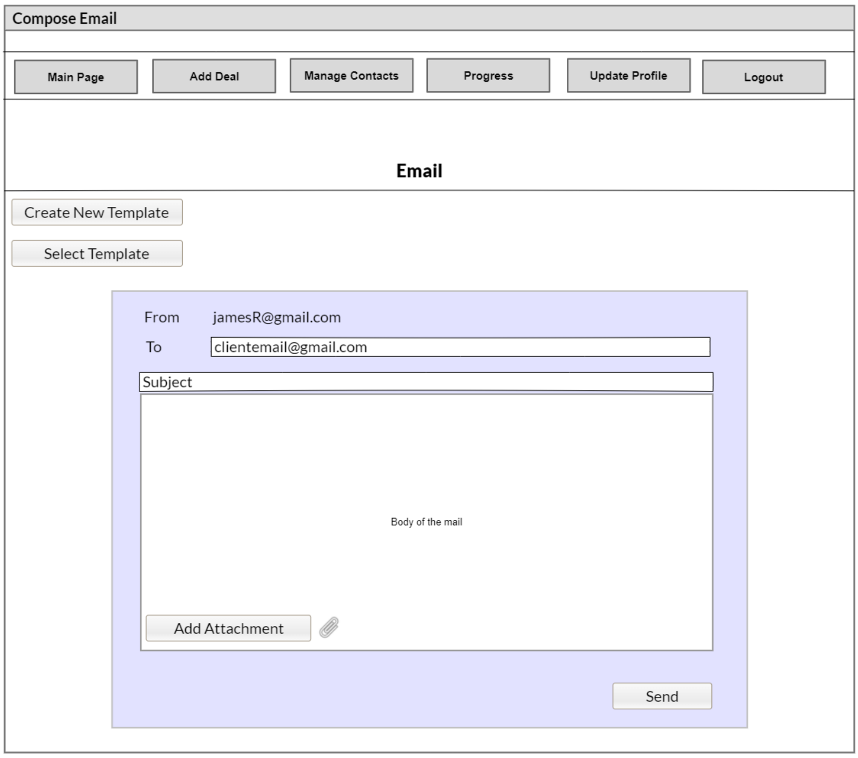


Fig 1.2 Compose Email Page (When select template button is clicked) [CRM.Email]

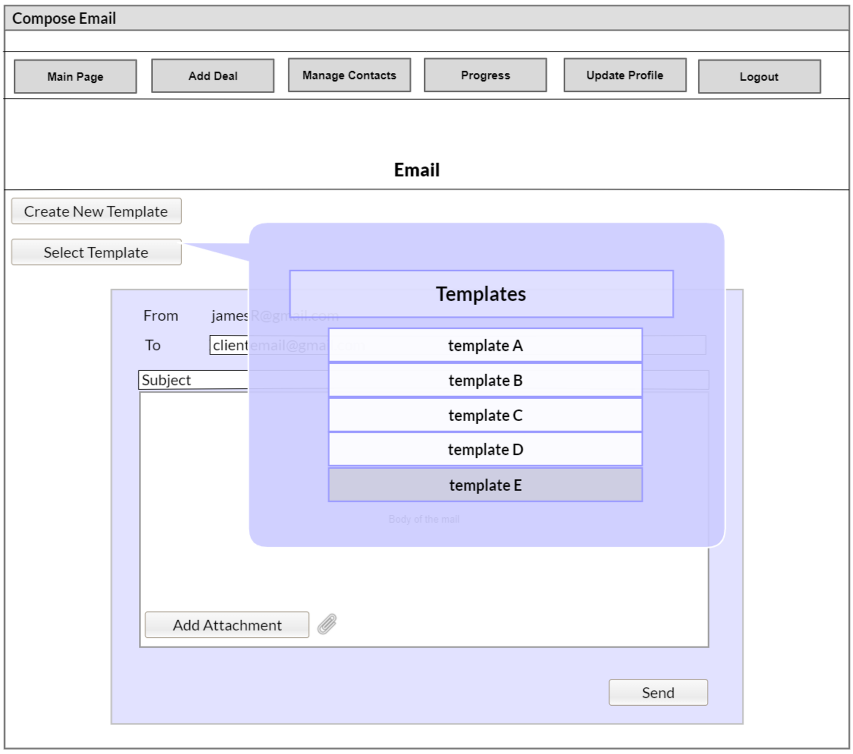
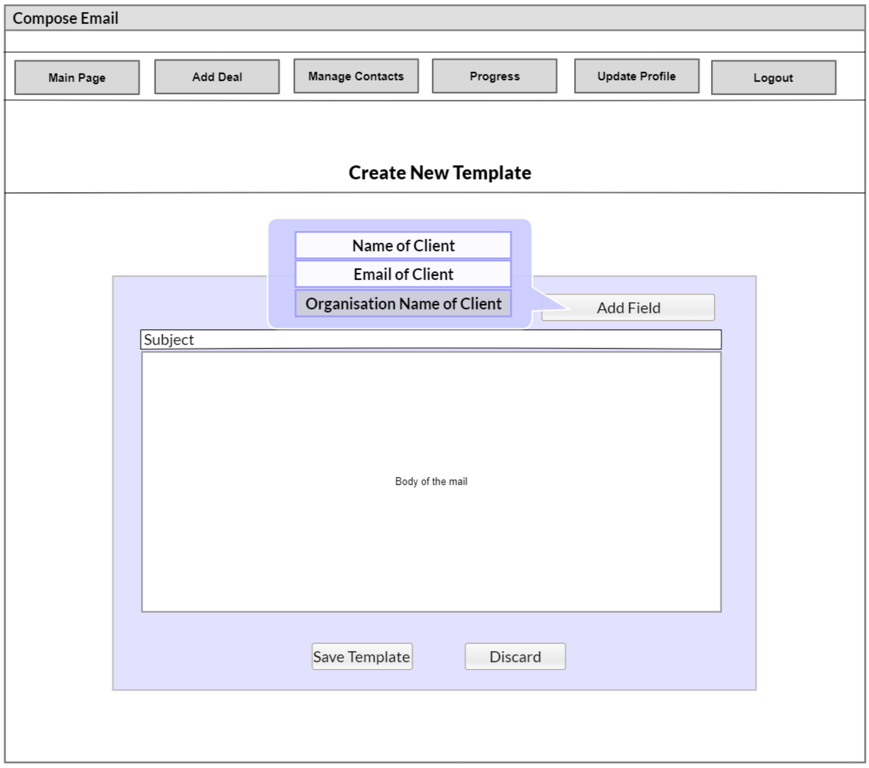
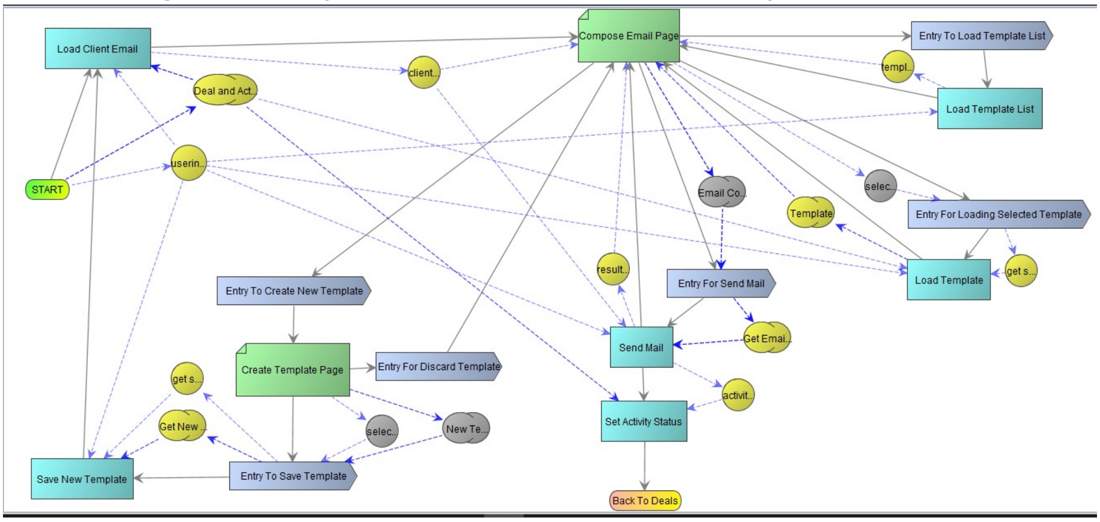


Fig 1.3 Create Template Page [CRM.Email]



2. Screenshot of Flow

Fig 2.1 Compose Email and Create Templates [CRM.Email]



3. Explanation

COMPOSE EMAIL (Fig 1.1 and Fig 1.2):

When the user clicks on an activity which is an email then it will lead to this subproject. In ‘Compose Email Page’ page the user can draft a new email or select a template. The ‘’ method will load the client email id and display it on ‘to’ section of compose page.

The Compose Email Page for Sales Executive can perform the following actions:

- Select Template: By clicking on select template button on the ‘Compose Email Page’ the control goes to ‘Load Template List’ method through ‘Entry To Load Template List’ entry point; the method will load the template list and display it on ‘Compose Email Page’. The template list loaded by the method is carried by ‘template list’ data node. The user can choose a template from the list and the template will be loaded by ‘Load Template’ method using ‘Entry For Loading Selected Template’ entry point. The method is given the template name using ‘selected template’ and ‘get selected template’ data nodes and also given client whole contact details (name, org. name, email, etc.) using ‘Deal and Activity ID.client contacts’ data node; and the loaded template is displayed using ‘Template’ group data node on ‘Compose Email Page’.
- Create Template: By clicking on create template button on the ‘Compose Email Page’ the control goes to ‘Create Template Page’ page using ‘Entry To Create New Template’ entry point.
- Send: By clicking on send button the control goes to ‘Send Mail’ method through ‘Entry For Send Mail’ entry point which sends the

email to the client. The email contents is given to this methodising ‘Email Contents’ and ‘Get Email Contents’ group data nodes and the client mail id using ‘client email’ data node. After this the activity is set as done by ‘Set Activity Status’ method using the status given by ‘Send Mail’ method using ‘activity status’ data node. The deal id and activity id is also given to ‘Set Activity Status’ method using ‘Deal and Activity ID’ group data node.

- Add Attachment: By clicking on Add Attachment button on the ‘Compose Email Page’ the user can upload a file to the email to be sent.

CREATE TEMPLATE (Fig 1.3):

On this page the user can create a new template like set subject, body of the email. The user can add fields like name, etc. which will actually show the user information when the template is used. The user has to just place the cursor where you need the field and click on add field button and choose a field type from the list.

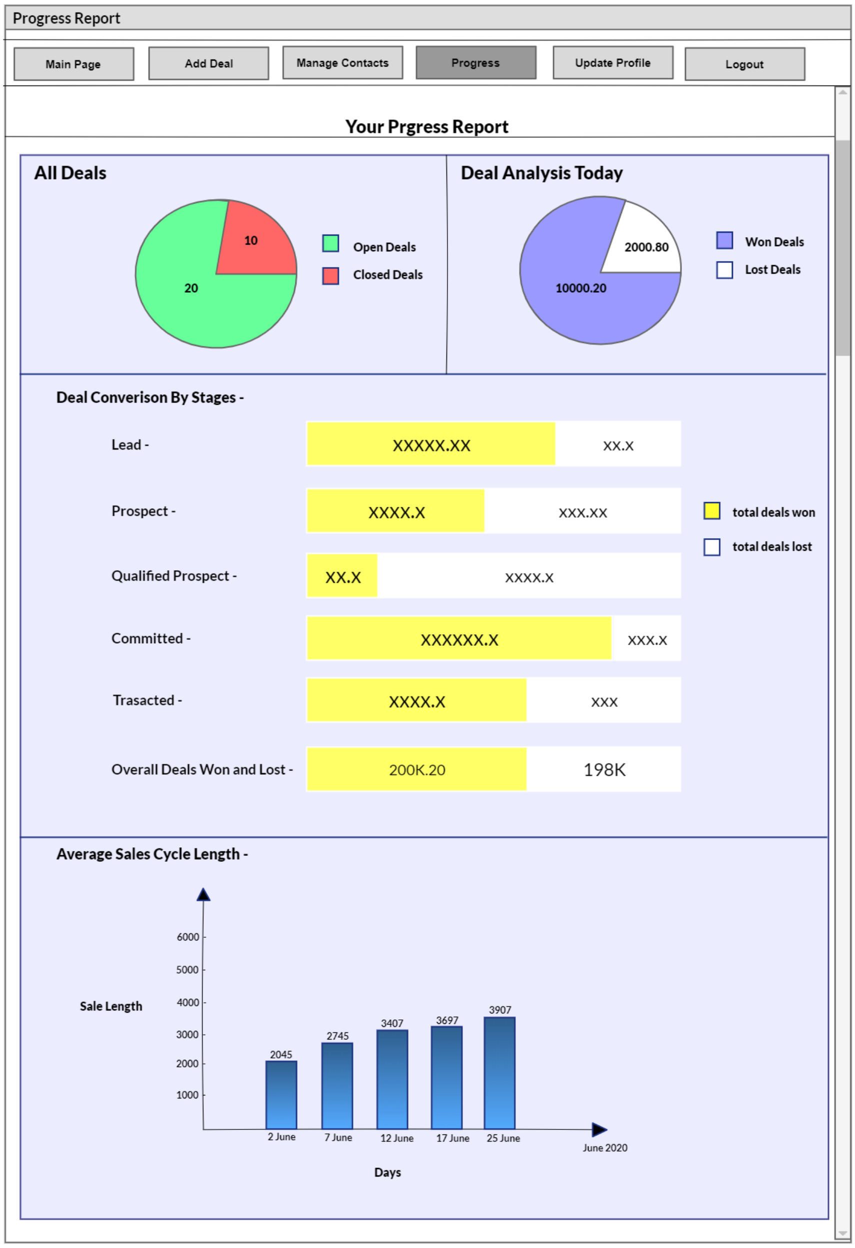
The Create Template Page for Sales Executive can perform the following actions:

- Add Field: By clicking on Add Field button on the ‘Create Template Page’ the user can add field in the template.
- Save Template: By clicking on Save Template button on the ‘Create Template Page’ the control goes to ‘Save New Template’ method through ‘Entry To Save Template’ entry point; the method will save the template. The template contents are carried by ‘get selected fields’ data node and ‘Get New Template’ group data node to be saved by method.
- Discard: By clicking on Discard button on the ‘Create Template Page’ the control will go back to Compose Email Page through ‘Entry For Discard Template’ entry point

1.7 View Progress Report

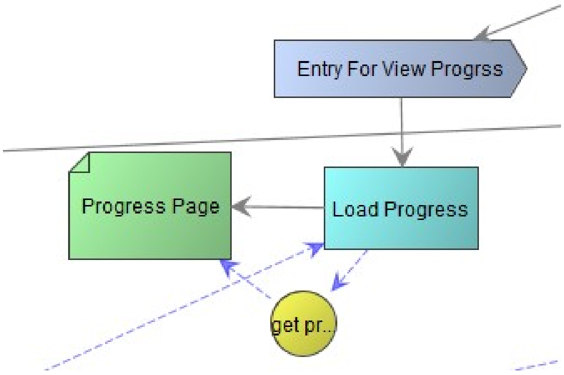
1. Wireframe

Fig 1.1 Progress Page [CRM.Application]



2. Screenshot of Flow

Fig 2.1 View Progress Report [CRM.Application]



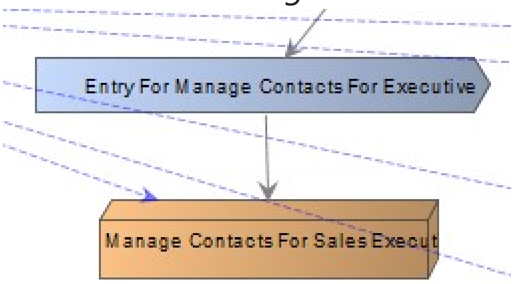
3. Explanation

When the user clicks on the progress report button on the main page. The control will go 'Entry For View Progress' entry point which will lead to 'Load Progress Method' which loads progress details like 'Deal conversion by stages', 'Average sales cycle length', etc. Progress stage using 'get progress' data node.

1.8 Manage Contacts

Screenshot of Flow

Fig. Contacts Subsystem [CRM.Application]



Explanation

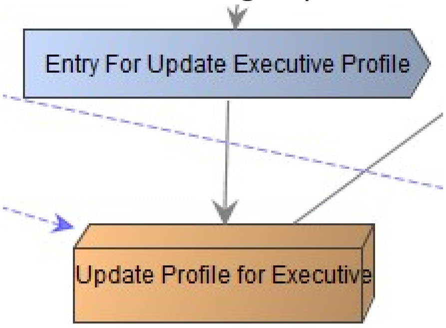
The ‘Contact Subsystem’ node is linked to ‘CRM.Add_Contacts’ subproject.

By clicking on the Manage Contact’s button in the Menu For Executive will lead to Contacts Page [in CRM.Add_Contatcs] through ‘Entry For Contacts Page’ entry point node which is then connected to subsystem. (Refer-[F] MANAGE CONTATCS)

1.9 Update Profile

Screenshot of Flow

Fig. Update Profile Subsystem [CRM.Application]



Explanation

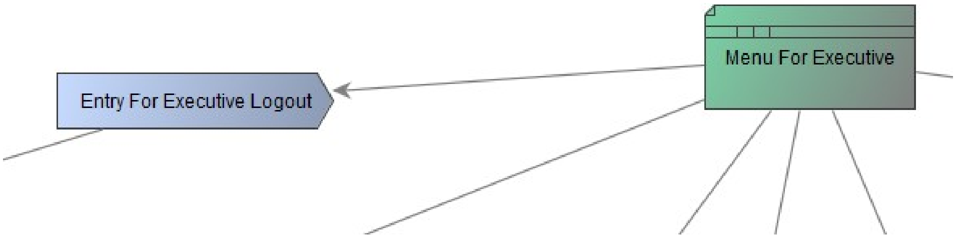
The ‘Update Profile for Sales Executive’ Subsystem node is linked to ‘CRM.Update_User_Profile’ subproject.

By clicking on the Update Profile in the Menu For Executive it will lead to Update User Profile Page [in CRM.Update_User_Profile] through ‘Entry To Update Executive Profile’ entry point node which is then connected to subsystem. (Refer-[E] Update User Profile)

1.10 Logout

Screenshot of Flow

Fig. Logout Entry [CRM.Application]



Explanation

After clicking on the Logout button on the 'Menu For Executive’ with the help of the 'Entry For Executive logout', it will lead to the 'Logout' method node (which will help the executive logout) and it will go to the 'login page'.

For ‘Logout’ method (Refer – [A] LOGIN and FORGOT PASSWORD – 1. Login and Logout)

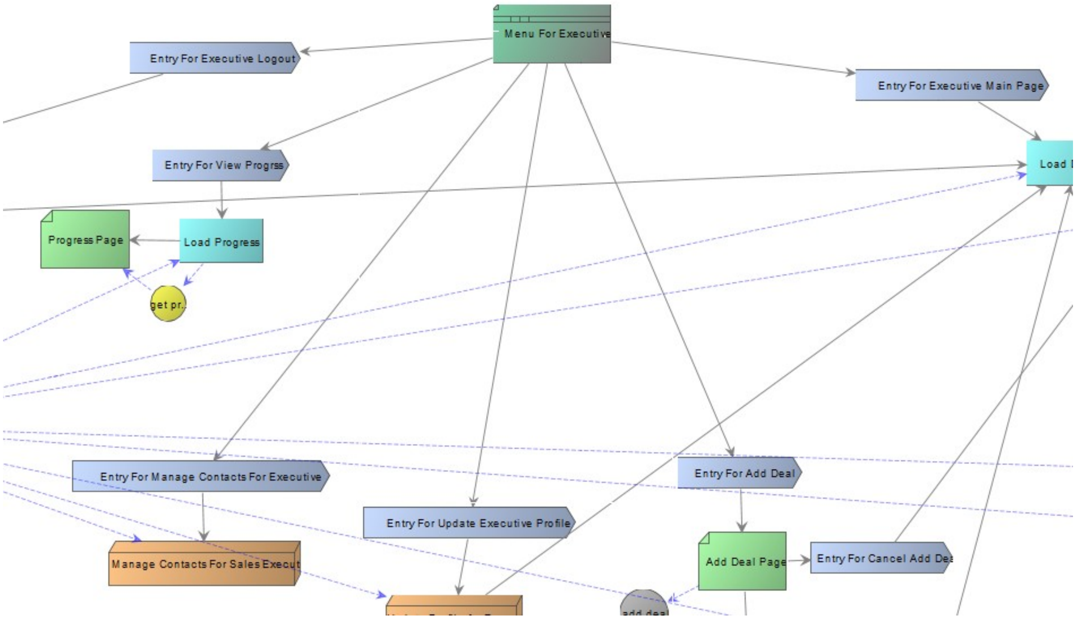
1.12 Menu For Executive

1. Wireframe

Fig 1.1 Menu For Executive [CRM.Application]

2. Screenshot of Flow

Fig 2.1 Menu [CRM.Application]



3. Explanation

The Menu For Executive and perform the following actions:

- Main Page– By Clicking on ‘Main Page’ in the menu the control will go to ’Manager Main Page’ through ‘Entry For Manager Main Page’ entry point (Refer- 1. Main Page for Executive)
- Add New Deal – By clicking on Add New Deal button in the main page, will lead to ‘Add Deal Page’ through ‘Entry For Add Deal’ entry point. (Refer – 1.2 Add New Deal).
- Manage Contacts –By clicking on Contacts button in the main page, will lead to ‘Contact Subsystem’ subsystem through ‘Entry For Contacts Page’ entry point. The ‘Contact Subsystem’ subsystem is linked to CRM.Add_Contacts subproject. (Refer – 1.8 Manage Contacts)
- Progress Report – By clicking on Progress Report button in the main page, will lead to ‘Progress Page’ page through ‘Entry For View Progress’ entry point. (Refer – 1.7 View Progress Report).
- Update Profile – By clicking on Update Profile button in the main page, will lead to ‘Update Profile for Executive Subsystem’

subsystem through ‘Entry For Update Executive Profile’ entry point. The ‘Update Profile for Executive Subsystem’ subsystem is linked to CRM.Update_User_Profile subproject. (Refer – 1.9 Update Profile).

- Logout – By clicking on Logout button in the main page, will logout the sales executive out of the system. (Refer – 1.10 Logout)

[E] UPDATE USER PROFILE

1. Update Profile Page

1. Wireframe

Fig 1.1 Update Profile Page (for Admin) [CRM.Update_User_Profile]

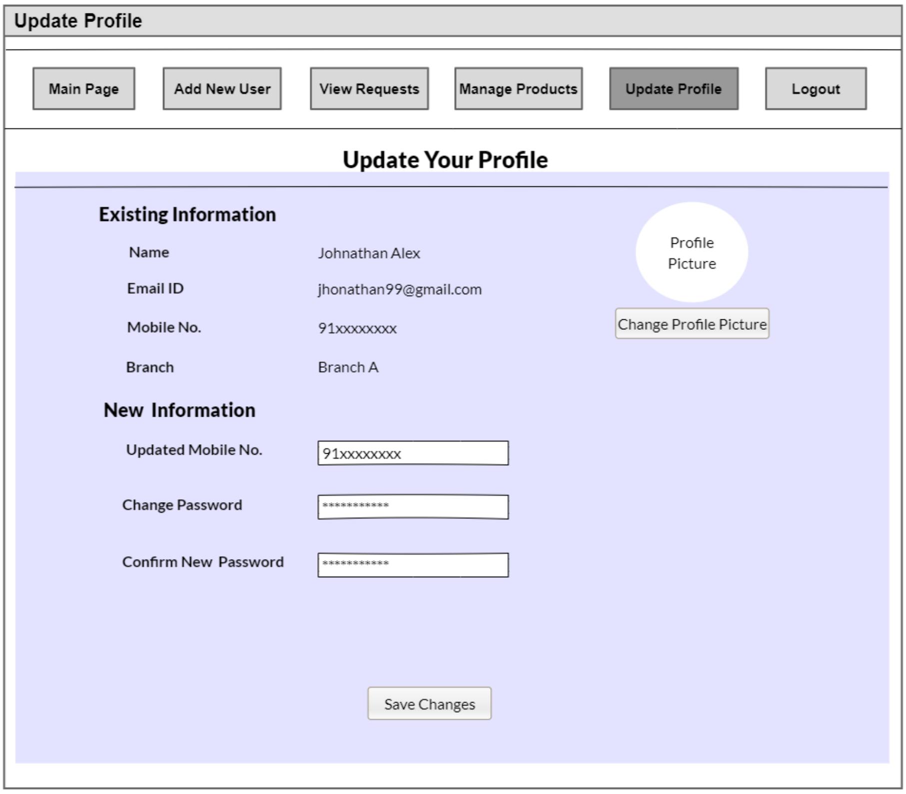


Fig 1.2 Update Profile Page (for Sales Manager) [CRM.Update_User_Profile]

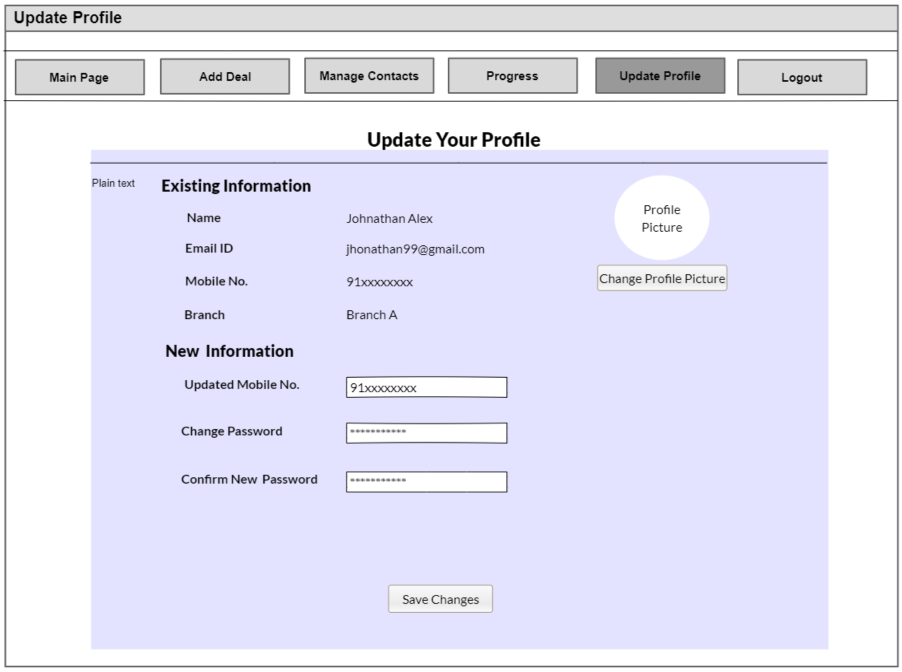
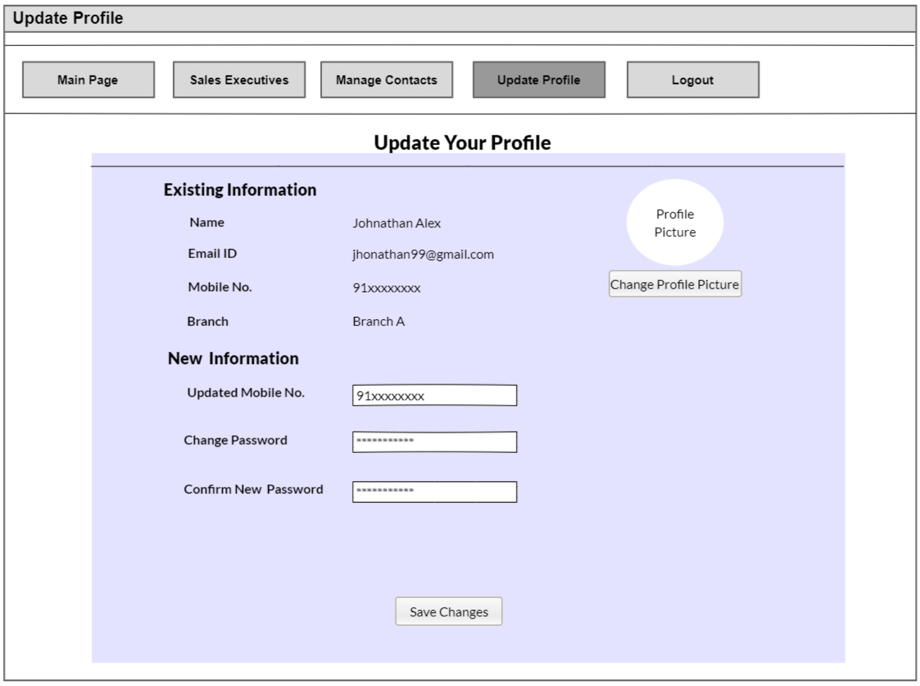
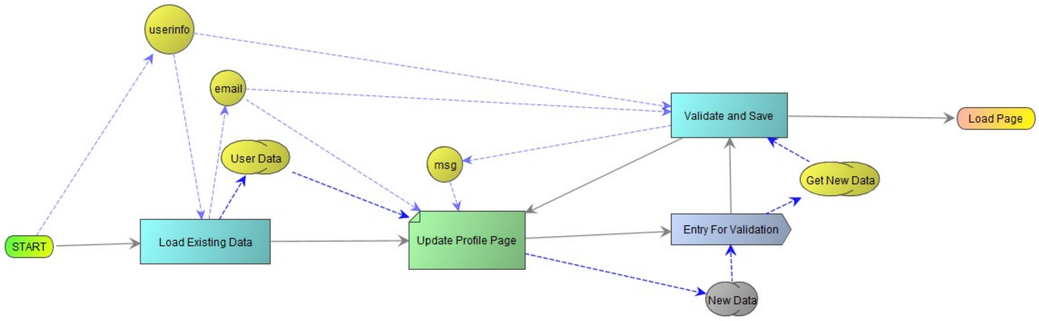


Fig 1.3 Update Profile Page (for Sales Executive) [CRM.Update_User_Profile]



2. Screenshot of Flow

Fig 2.1 Update Profile [CRM.Update_User_Profile]



3. Explanation

ALL Update Profile is linked with this subproject 'CRM.Update_User_Profile'.

The flow starts with 'Start' node and load update profile of users through the 'Load update Profile Page' method and then goes to the "update user profile page" and updates the profile of users with the help of the 'entry for update profile' the entry point which will get a new data and validate and save the data with 'validate and save' method.

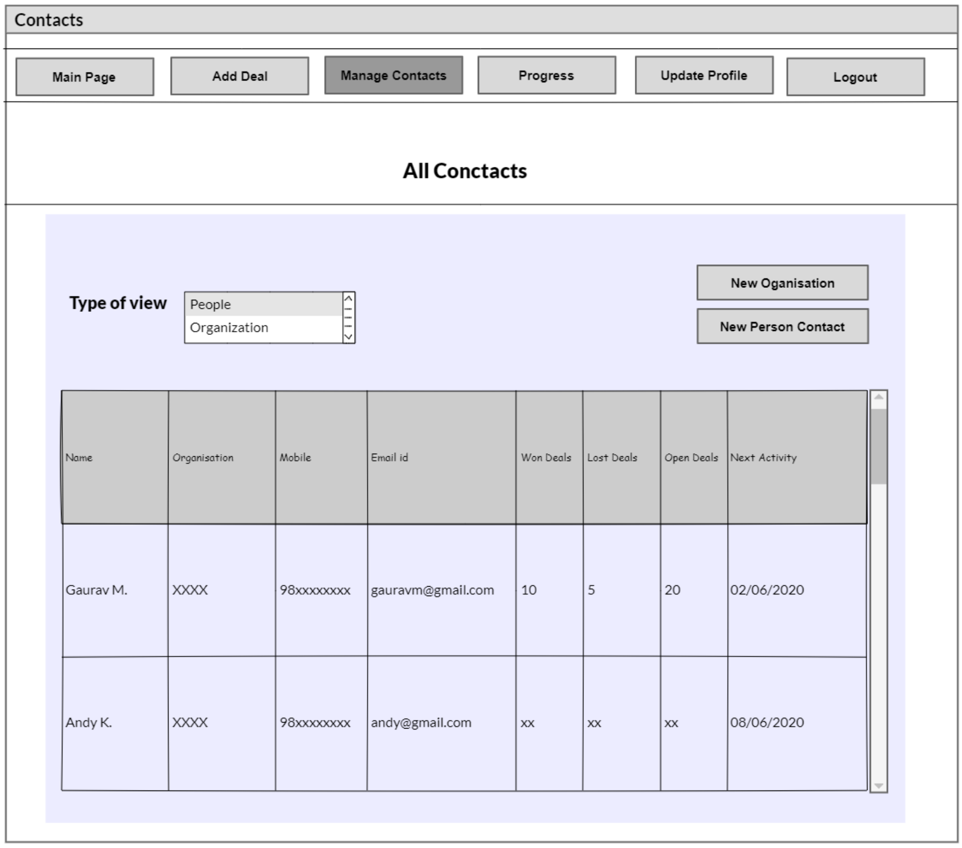
After successfully saving the profile it will lead to finish node 'Load page '.

[F] MANAGE CONTACTS

1. View All Contacts Page

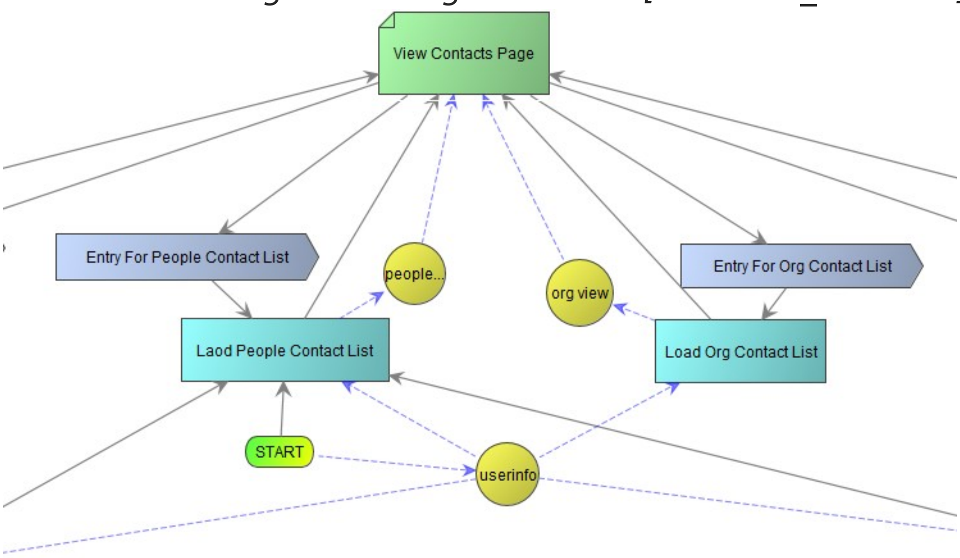
1. Wireframe

Fig 1.1 View Contacts Page (for Executive) [note- it's the same for manager, the difference is of menu] [CRM.Add_Contatcs]



2. Screenshot of Flow

Fig 2.1 Manage Contacts [CRM.Add_Contatcs]



3. Explanation

All the Manage contacts (From Sales Executive and Sales Manager) are linked with this sub-project 'CRM.Add_Contacts'.

The flow starts with the 'Start' node and leads to the 'Load People Contacts List' method, here all the existing contacts of people and Organizations will be displayed.

The actor of the system can view either the people's view or the organization's view.

The View Contacts Page for Sales Manager and Sales Executive can perform the following actions:

- Type of view - By clicking on the Type of view button it will display the two options like 'person view ' and 'Organisation view'. The default type of view is people. (Refer wireframes – Fig. 2.1 and Fig. 2.2).
- Add organisation - By clicking on the 'Add organisation' button will lead to 'Add Organisation Page' (in CRM.Add_contacts). (Refer – 1.3 Add New organisation Contact)
- Add person contact - By clicking on the 'Add Person contact' button will lead to 'Add Person Page' (in CRM.Add_contacts). (Refer – 1.2 Add New Person Contact)

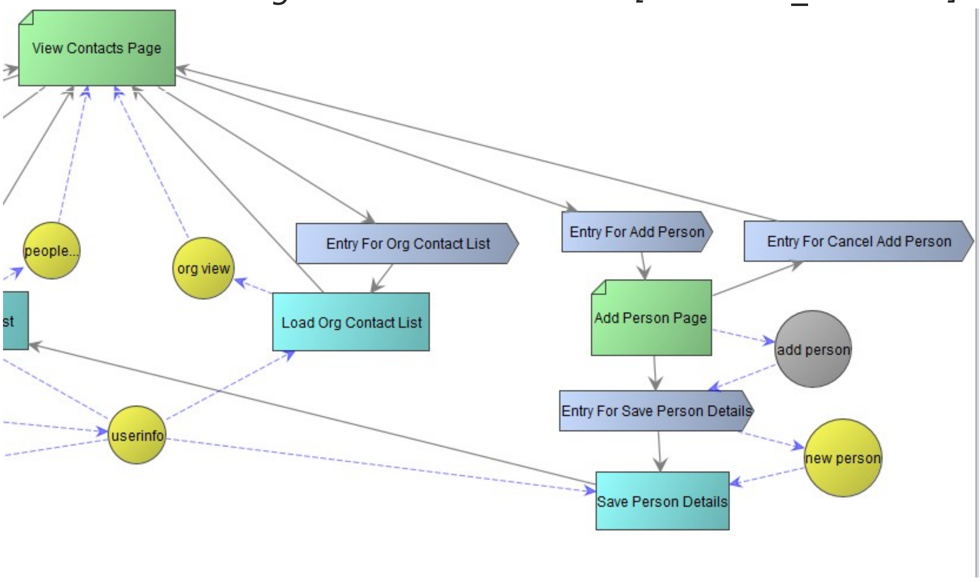
1.2 Add New Person Contact

1. Wireframe

Fig 1.1 Add Person Page (for Executive) [note- it’s the same for manager, the difference is of menu] [CRM.Add_Contatcs]

2. Screenshot of Flow

Fig 2.1 Add New Person [CRM.Add_Contatcs]



3. Explanation

When the user clicks on the New person contact button on 'View Contact page' it leads to the 'Add Person Page' with the help of 'Entry For Add Person' entry point, the user can enter and save the details for any new person using the 'add person' and 'get person' data nodes passed to 'Save

New Person Details Method' through ‘Entry For Save Person Details’ entry point and the method will save data in database.

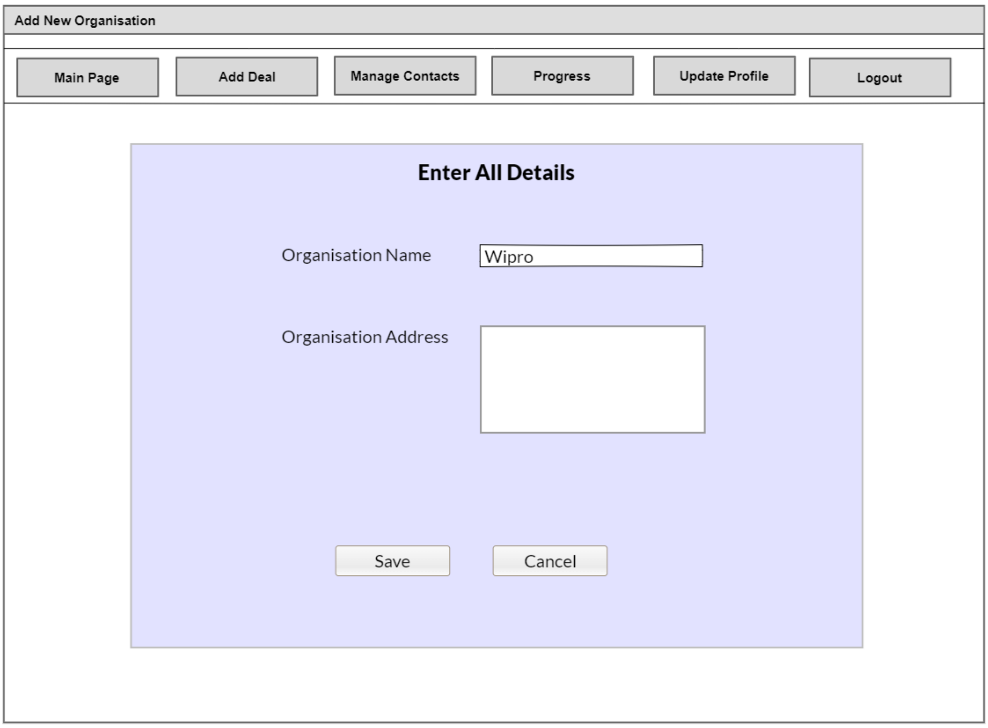
The Add Person Page can perform the following actions:

- Save – By clicking on Save button on ‘Add Person Page’ will save the entered contact details.
- Cancel – By clicking on Cancel button on ‘Add Person Page’ will lead the user back to ‘Contacts Page’ through ‘Entry For Cancel Add Person’ entry point.

1.3 Add New Organisation Contact

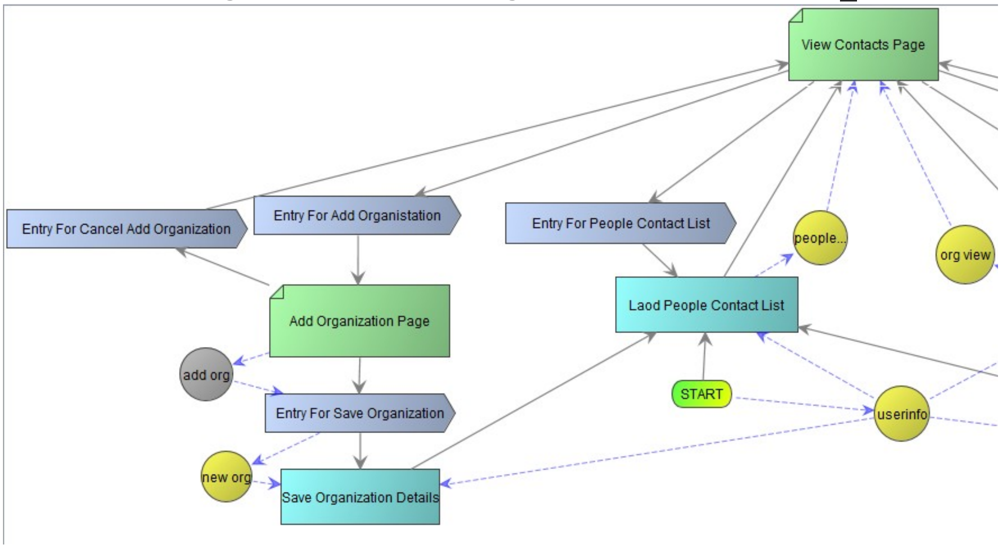
1. Wireframe

Fig 1.1 Add Organization Page (for Executive) [note- it’s the same for manager, the difference is of menu] [CRM.Add_Contatcs]



2. Screenshot of Flow

Fig 2.1 Add New Organization [CRM.Add_Contatcs]



3. Explanation

When the user clicks on the New Organisation button on 'Contact page' it leads to the ' Add Organization Page' with the help of ' Entry For Add Organisation' entry point, the user can enter and save the details for any new person using the ‘add org’ and ‘get org’ data nodes passed to ‘Save Organization Details Method’ through ‘Entry For Save Organisation’ entry point and the method will save data in database.

The Add Organization Page can perform the following actions:

- Save – By clicking on Save button on ‘Add Organization Page’ will save the entered contact details.
- Cancel – By clicking on Cancel button on ‘Add Organisation’ Page will lead the user back to ‘Contacts Page’ through ‘Entry For Cancel Add Organization’ entry point.

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