

## Governors State University OPUS Open Portal to University Scholarship

---

All Capstone Projects

Student Capstone Projects

---

Fall 2016

# Sales Management Portal

Venkata Chakradhar Bonthala  
*Governors State University*

Mohammed Shoeb Ali Khan  
*Governors State University*

Ateeqoddin Mohammed  
*Governors State University*

Follow this and additional works at: <http://opus.govst.edu/capstones>

 Part of the [Computer Sciences Commons](#)

---

### Recommended Citation

Bonthala, Venkata Chakradhar; Ali Khan, Mohammed Shoeb; and Mohammed, Ateeqoddin, "Sales Management Portal" (2016). *All Capstone Projects*. 261.  
<http://opus.govst.edu/capstones/261>

For more information about the academic degree, extended learning, and certificate programs of Governors State University, go to [http://www.govst.edu/Academics/Degree\\_Programs\\_and\\_Certifications/](http://www.govst.edu/Academics/Degree_Programs_and_Certifications/)

Visit the [Governors State Computer Science Department](#)

This Project Summary is brought to you for free and open access by the Student Capstone Projects at OPUS Open Portal to University Scholarship. It has been accepted for inclusion in All Capstone Projects by an authorized administrator of OPUS Open Portal to University Scholarship. For more information, please contact [opus@govst.edu](mailto:opus@govst.edu).

## **ABSTRACT**

### **SALES MANAGEMENT PORTAL**

- ✓ IDE: Visual Studio 2013
- ✓ DATABASE: MICROSOFT SQL SERVER 2008 R2 MANAGEMENT STUDIO
- ✓ LANGUAGE: DOT NET
- ✓ FRAMEWORK: MVC
- ✓ SCRIPTING: JavaScript and JQuery
- ✓ TECHNOLOGY: Entity framework and Entity Data Model (EDMX)
- ✓ Skills used HTML, CSS, JavaScript, JQuery, Bootstrap navigation, Entity framework, EDMX

### **PROJECT FUNCTIONALITY**

- ❖ **User login and logout**
- ❖ **User authenticate and authorization**
- ❖ **Dashboard with Current Client List**
- ❖ **Current Client Details View**
- ❖ **Search Client List by Client Name and opportunities type.**
- ❖ **Add New Client**
- ❖ **Add New Announcement**
- ❖ **Announcement Details View with Date Wise**
- ❖ **Website navigation**
- ❖ **Responsive Design**
- ❖ **Websites Cookie maintain**

## **EXPLANATION:**

Our project aim is to design a Sales Management Portal which is helpful for an organization to provide flexibility to interact with the users and clients. Current design is mainly focused on the manager user.

In this project, we have provided the features like,

1. A search option: where manager user can track information of clients and all the users.

Which was a major requirement.

2. Manager Console: Manager can create user accounts, can send messages and view details

3. Pipeline Reports: Manager can run various reports such as,

- List of prospects
- Reports of opportunities
- By date, by month, sales person

This project reduces the time that takes to search for the clients, users in the database.

- All the users who uses this portal will get notified about the important information through notification option. This makes easy for the users prepare for the task after getting notified. And, also its beneficial to managers to intimate users by a single message.
- Manager can make notes related to the project. So, that he can check his important information that stored in the notes. This makes easy to manager that he cannot miss any information during the project deal.
- Manager can send messages to all the users by using message option. This makes easy to manager that he can convey his information by using message option.
- Manager can store all the information about the project and can export all the information to an excel file. This makes easy to send information through email to others.
- Manager can edit, view and delete information this makes manger to trash information which is not necessary or no use.
- This website does not replace any existing application or website. It's completely a newly designed website.

**Table of Contents**

- 1. Feature Description ..... 1**
  - 1.1 Competitive Information .....1**
  - 1.2 Relationship to Other Applications/Projects.....1**
  - 1.3 Assumptions and Dependencies .....1**
  - 1.4 Future Enhancements.....1**
  - 1.5 Definitions and Acronyms.....2**
- 2. Technical Description..... 3**
  - 2.1 Application Architecture.....3**
  - 2.2 Application Information flows .....4**
  - 2.3 Interactions with other Projects (if Any).....5**
  - 2.4 Interactions with other Applications .....5**
  - 2.5 Capabilities .....5**
  - 2.6 Risk Assessment and Management .....5**
- 3 Project Requirements ..... 5**
  - 3.1 Identification of Requirements .....5**
  - 3.2 Operations, Administration, Maintenance and Provisioning (OAM&P).....5**
  - 3.3 Security and Fraud Prevention .....6**
  - 3.4 Release and Transition Plan .....6**
- 4. Project Design Description ..... 23**
- 5. Internal/external Interface Impacts and Specification ..... 24**
- 6. Design Units Impacts ..... 24**
  - 6.1 Functional Area A/Design Unit A.....24**
    - 6.1.1 Functional Overview .....24**
    - 6.1.2 Impacts .....24**
    - 6.1.3 Requirements.....24**
  - 6.2 Functional Area B/Design Unit B .....25**
    - 6.2.1 Functional Overview.....25**
    - 6.2.2 Impacts .....26**
    - 6.2.3 Requirements.....26**
- 7. Open Issues ..... 26**
- 8. Acknowledgements ..... 26**
- 9. References..... 26**
- 10. Appendices..... 26**

## **1. Feature Description**

### **1.1 Competitive Information**

This project does not have any competition with any other applications or products or services. It is designed based on the university requirement for its internal use.

### **1.2 Relationship to Other Applications/Projects**

Our project is not similar with any projects. It is designed for our individual practice test for the course.

### **1.3 Assumptions and Dependencies**

New functionalities are not implemented in this project

Any application, services, capabilities, service or capability is not depended on this project.

There are lots of changes we can do this project. They are like,

We can provide filter option for client or user search

And, we can develop excel or word option so that the information that we generate will be exported to MS word or MS excel.

We can also develop project search by implementing filter and can introduce chat option for better communication between employees.

We can build a platform where users can share information related to the organization.

### **1.4 Future Enhancements**

New functionalities are not implemented in this project.

Any application, services, capabilities, service or capability is not depended on this project.

There are lots of changes we can do this project. They are like,

We can provide filter option for client or user search

And, we can develop excel or word option so that the information that we generate will be exported to MS word or MS excel.

We can also develop project search by implementing filter and can introduce chat option for better communication between employees.

We can build a platform where users can share information related to the organization.

## 1.5 Definitions and Acronyms

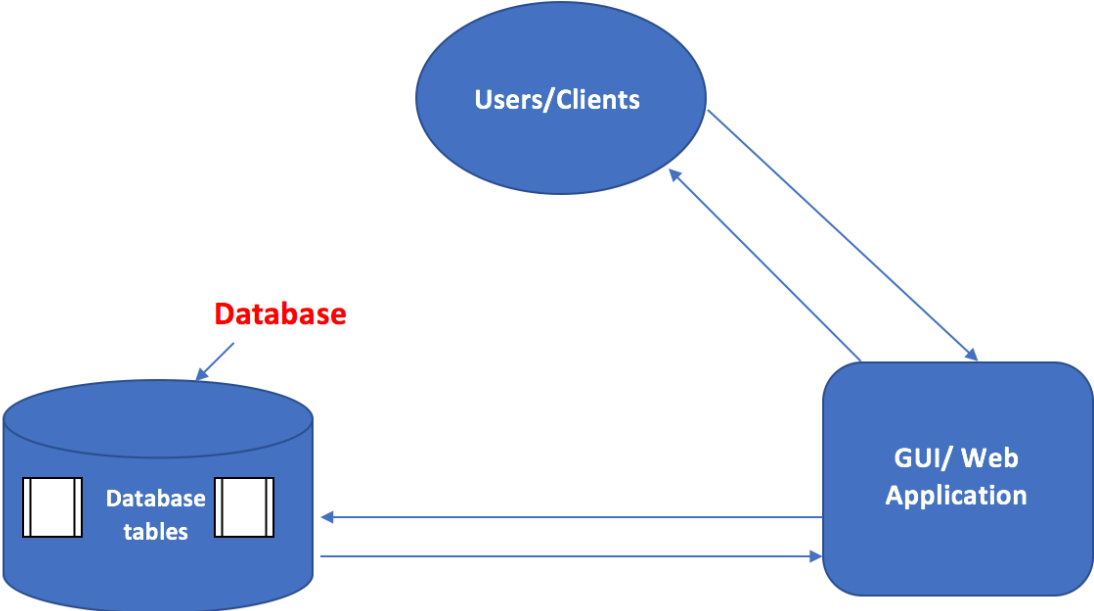
MVC – Model View Controller  
HTML- Hyper Text Markup Language  
CSS- Cascading Style Sheet  
JQuery- Java Query

### 2 Project Technical Description:

RAM: Minimum: 1GB  
Hard Disk: Minimum 32 GB  
Processor: Min: Core2Duo  
OS: Win 07 or Mac OS Cheetah  
Database: SQL server 2008  
Front end: .Net (Visual Studio 2012)

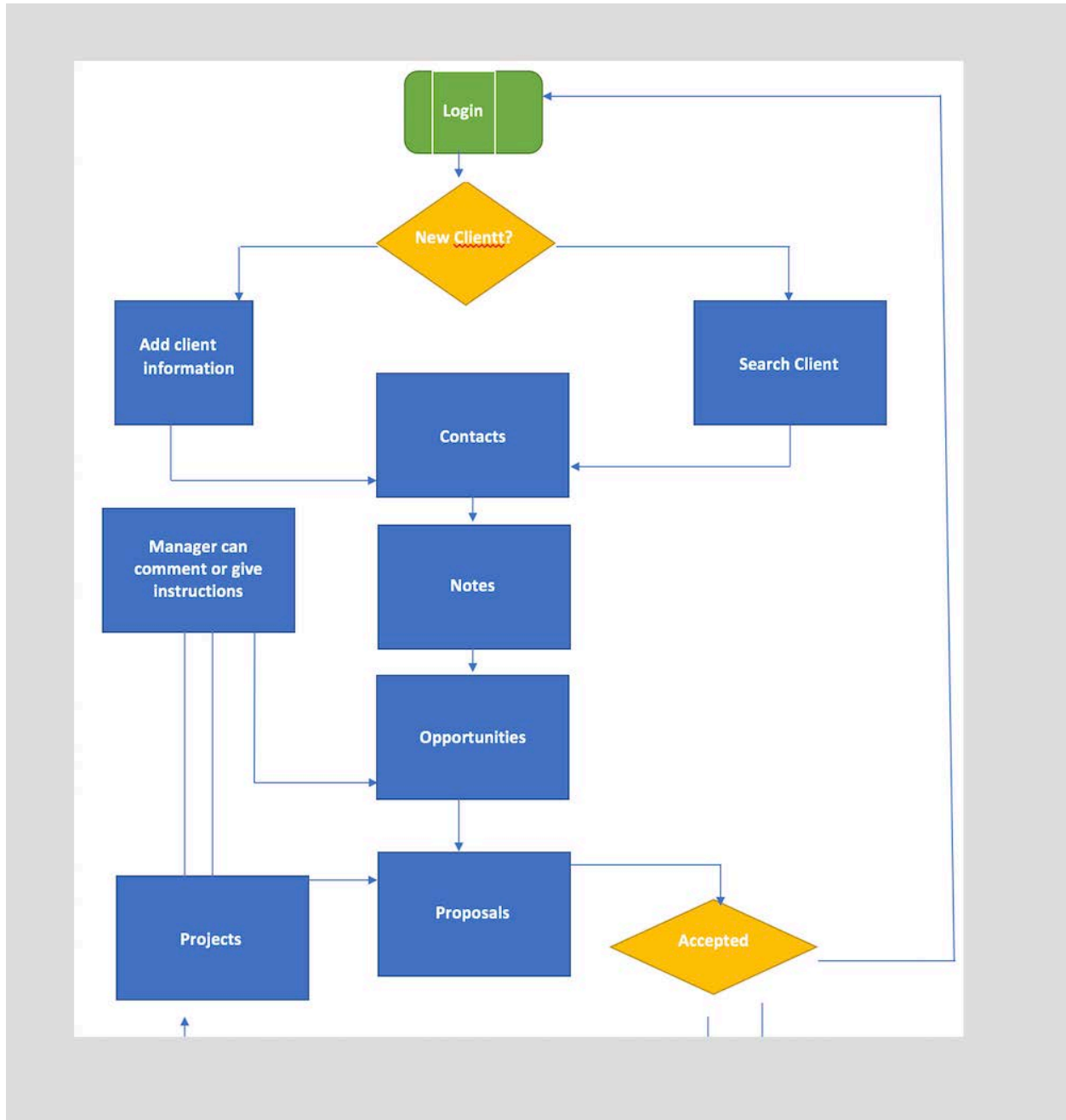
**2. Technical Description**

**2.1 Application Architecture**



## 2.2 Application Information flows

**DFD: Data Flow Diagram :**





## **2.3 Interactions with other Projects (if Any)**

This design does not have any interaction with any other project design.

## **2.4 Interactions with other Applications**

This project does not have any similarities with any other applications.

## **2.5 Capabilities**

For this project, we used SQL server 2008 to store the data into the database. It provides data insertion, deletion and editing information.

For the front end, we used, Visual Studio 2012 for development of the project. It provides code writing, debugging, compiling and execution.

## **2.6 Risk Assessment and Management**

By developing this project there will not be any risks except the security issue. For that, if you are using Windows operating system then make sure use genuine version of the anti-virus should be installed if it is Macintosh operating system then it not required of any anti-virus since it has inbuilt anti-virus in it.

# **3 Project Requirements**

## **3.1 Identification of Requirements**

- \* Specific – Import and export an excel sheet option needs to implement.
- \* Measurable – We have implemented import to excel option and its under progress.
- \* Achievable – There are lots of features can be implemented as I mentioned above, import and export excel sheet option and editing client or project information and upload/delete pictures option can also be implemented. Information sharing option between users can also be implemented.
- \* Realistic – Import/export option, editing client/project information, information sharing option, upload/delete user picture.
- \* Time-related – If the time given, can take 14 days to complete these tasks.

## **3.2 Operations, Administration, Maintenance and Provisioning (OAM&P)**

To keep all the data safe, daily backup is needed. Admin should implement its task on the daily basis.

### 3.3 Security and Fraud Prevention

Security should always be a high priority task for any organization or project. Required security measures should be implemented whenever anyone uses this product.

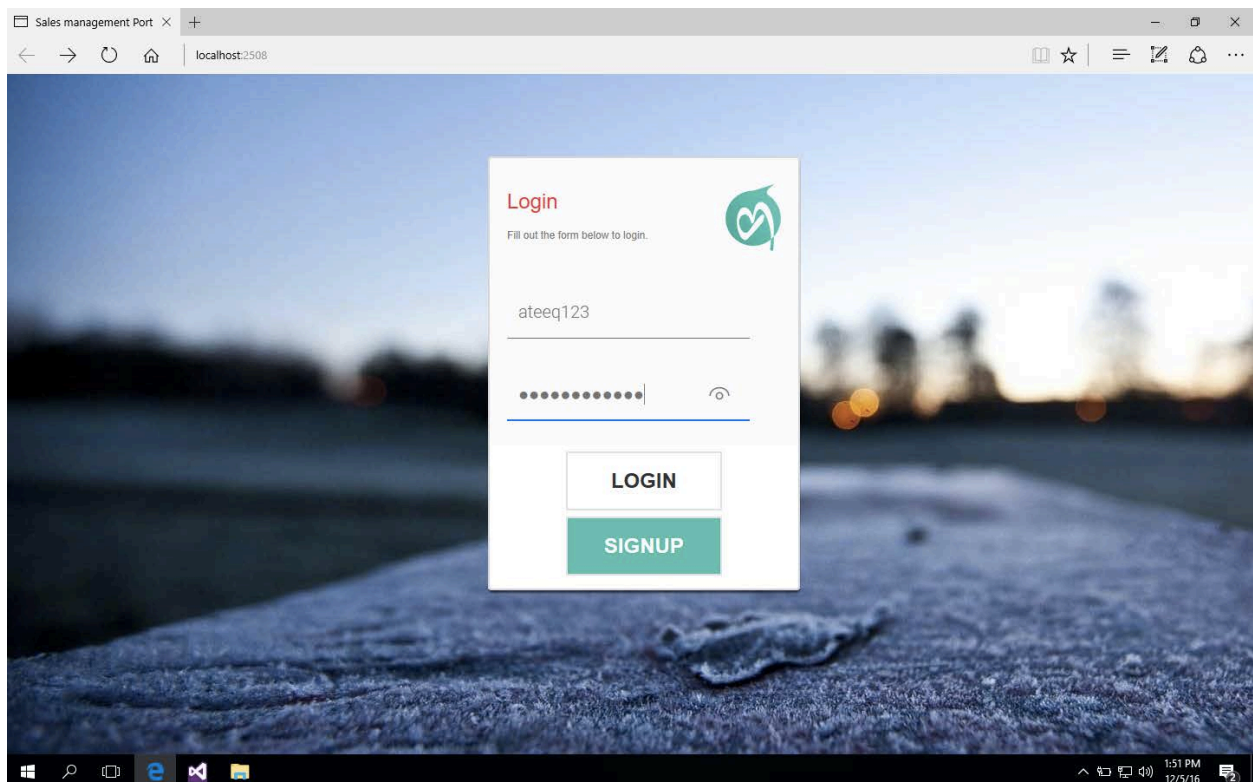
User authentication should be provided based on the privileges.

Access should be limited to normal users.

Necessary security tools should be used to monitor, detect if any issues are found.

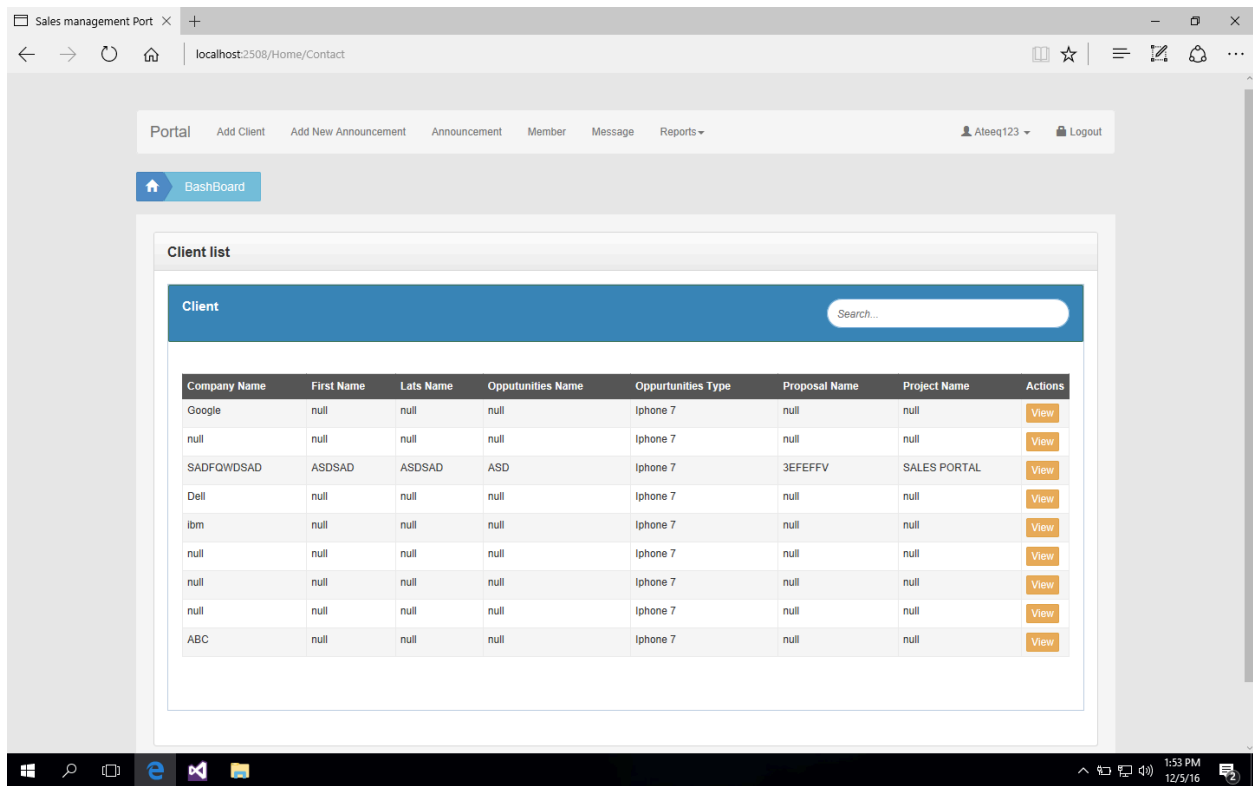
### 3.4 Release and Transition Plan

Explain how the project will be deployed to the customer, or update from the current release to a newer release.



This is a login page where a user provides their user ID and password to enter the website.

To create a new account, you can click on the sign-up option and create a new account by providing your first name, last name, email ID, and password.



This screen give us information on the client details like First name, Last name, Company name, Opportunity type, Proposal name Project name and Actions.

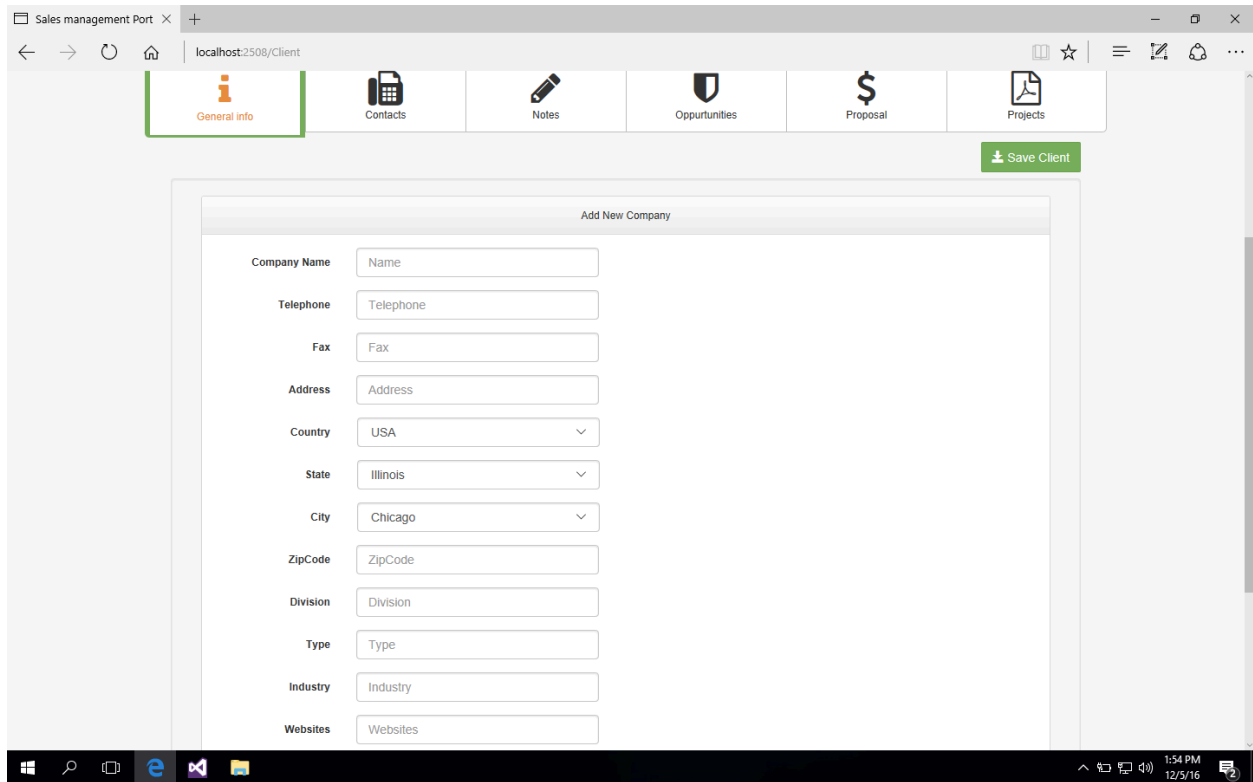
We can see the 'search' option where we can search for the clients or users in the system.

This screen gives information about client details.

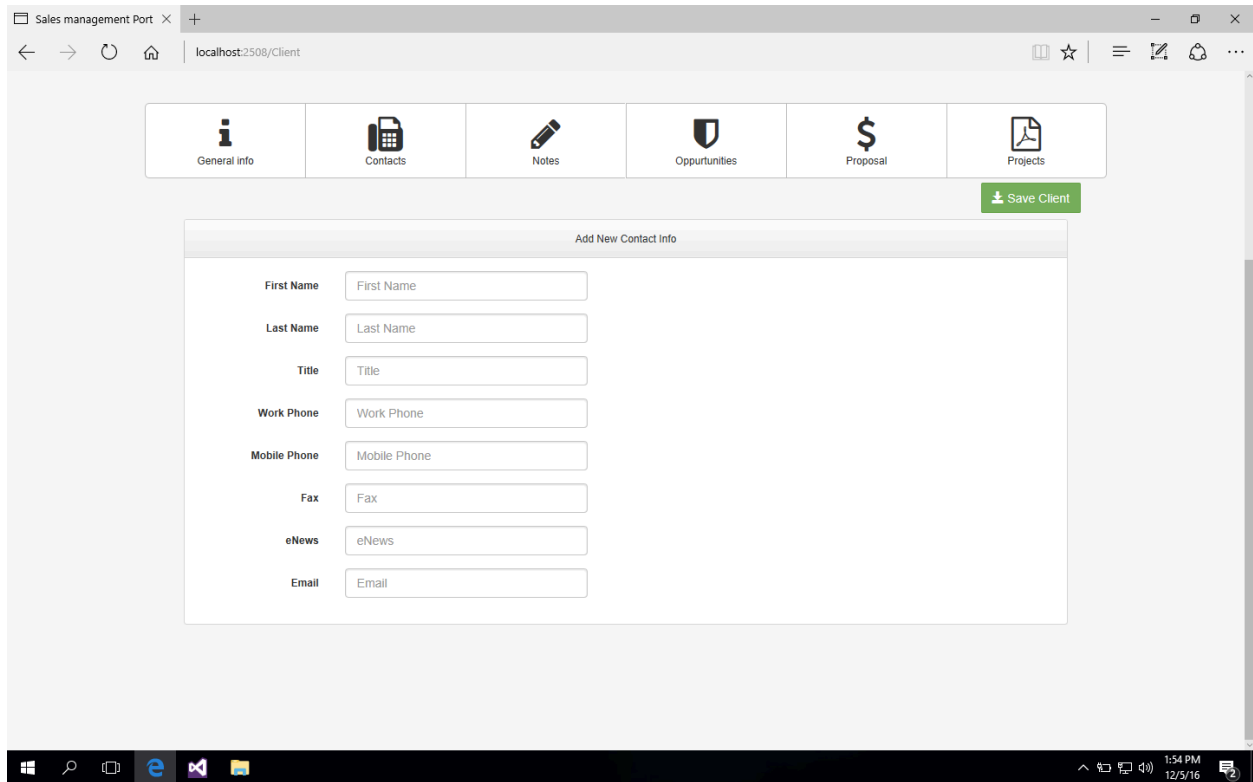
The screenshot shows a web browser window with the address bar displaying 'localhost:2508/Home/Contact'. The main content area is titled 'Client Details' and contains three sections:

- General Info:** A table with 14 columns: Company Name, Telephone, Fax, Address, Country, State, City, ZipCode, Division, Type, Industry, Website, Source, and Company Description. The data row shows: Google, 2694197883, null, Naperville, USA, Illinois, Chicago, 60645, Maps, Serch engine, IT, www.google.com, null, and Google is a search engine service provider.
- Contact Info:** A table with 8 columns: First Name, Last Name, Title, Work phone, Mobile Phone, Faxes, eNews, and Email. All fields in this table are null.
- Notes Info:** A section with a 'Notes' header and a single row containing null.

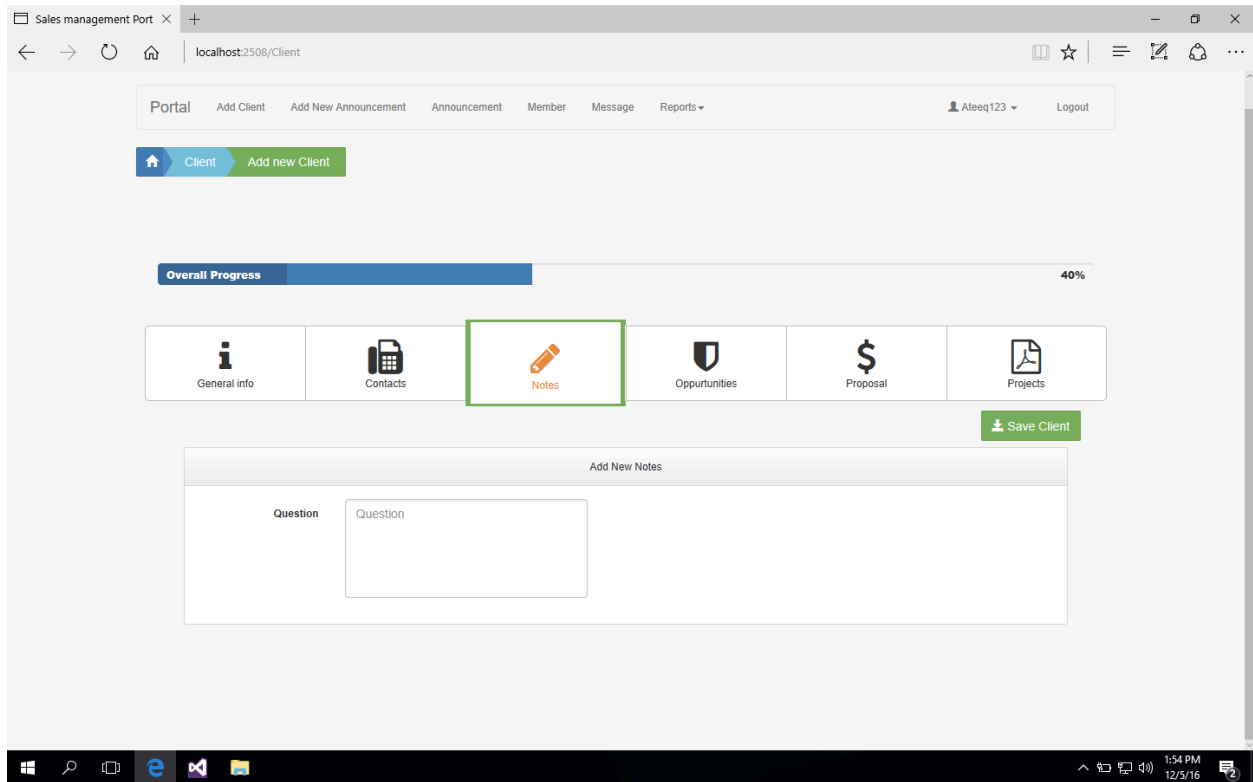
At the bottom of the browser window, the Windows taskbar is visible, showing the time as 1:53 PM on 12/5/16.



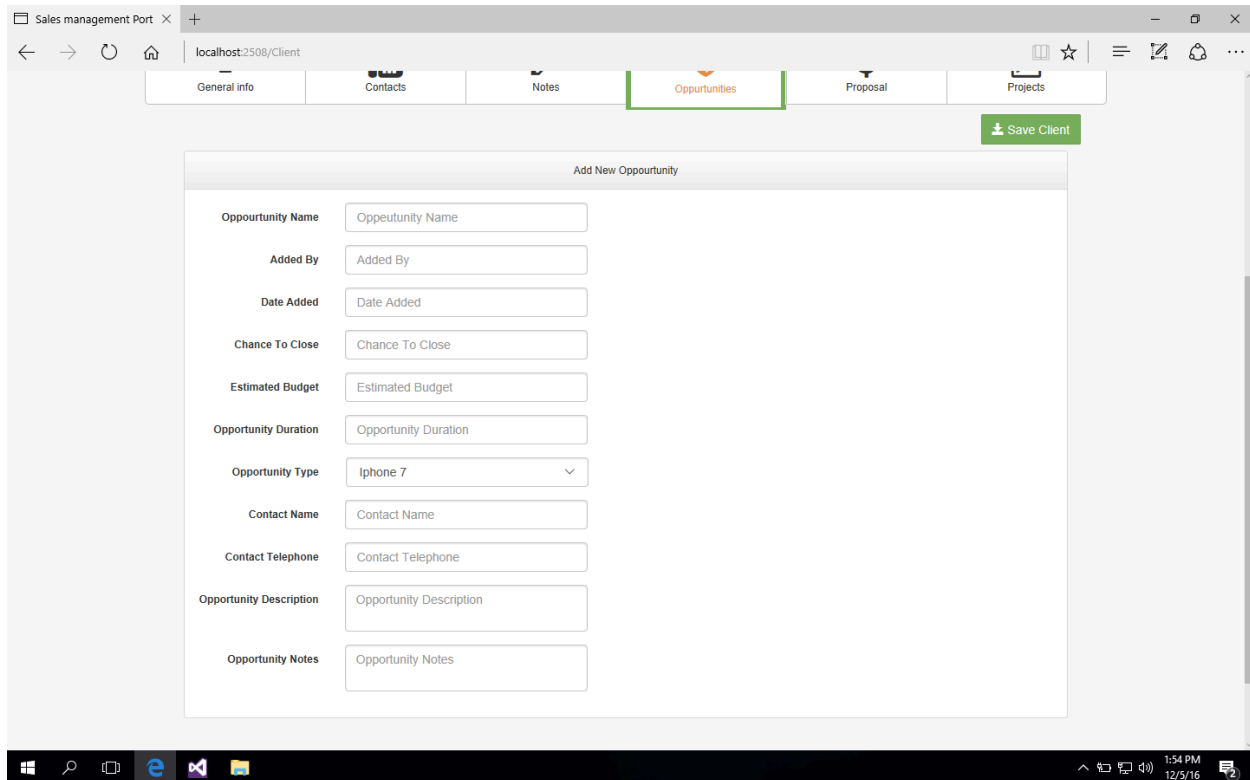
The above screen gives information about the 'General Info' form details like Company name, Telephone, Fax, Address, Country, State, City, Zip-code, Division, Type, Industry and Website if have any.



The above is contact page where you have enter details like First name, Last name, Title, Phone, Fax, Email id.



The above screen is a 'Notes' page where user can make notes of any important information, save it and check it later.



The above page is an Oppurtunities page where we have designed options like Oppourtunity name, added by, Date added, Estimated budget, oppourtunity duration, oppourtunity type and if we want we can make notes of any oppourtunity.



Sales management Port x +

localhost:2508/Client

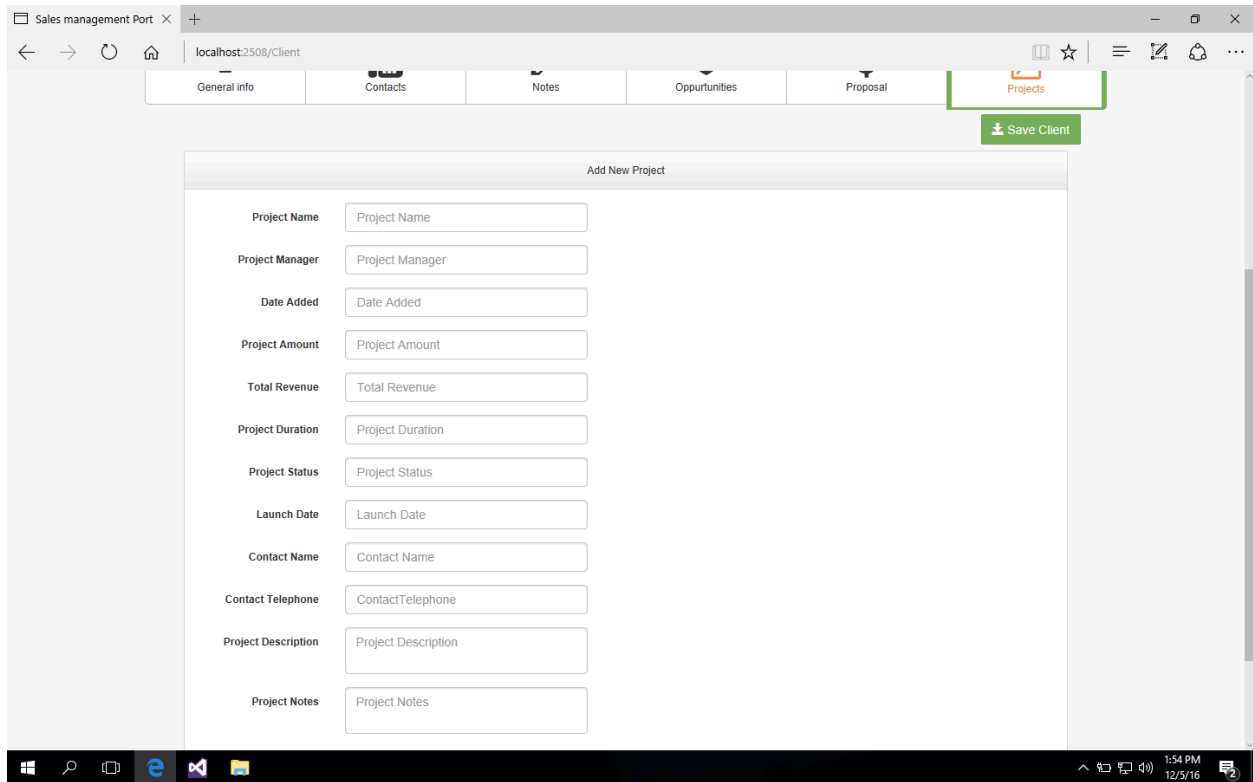
General info | Contacts | Notes | Opportunities | **Proposal** | Projects

Save Client

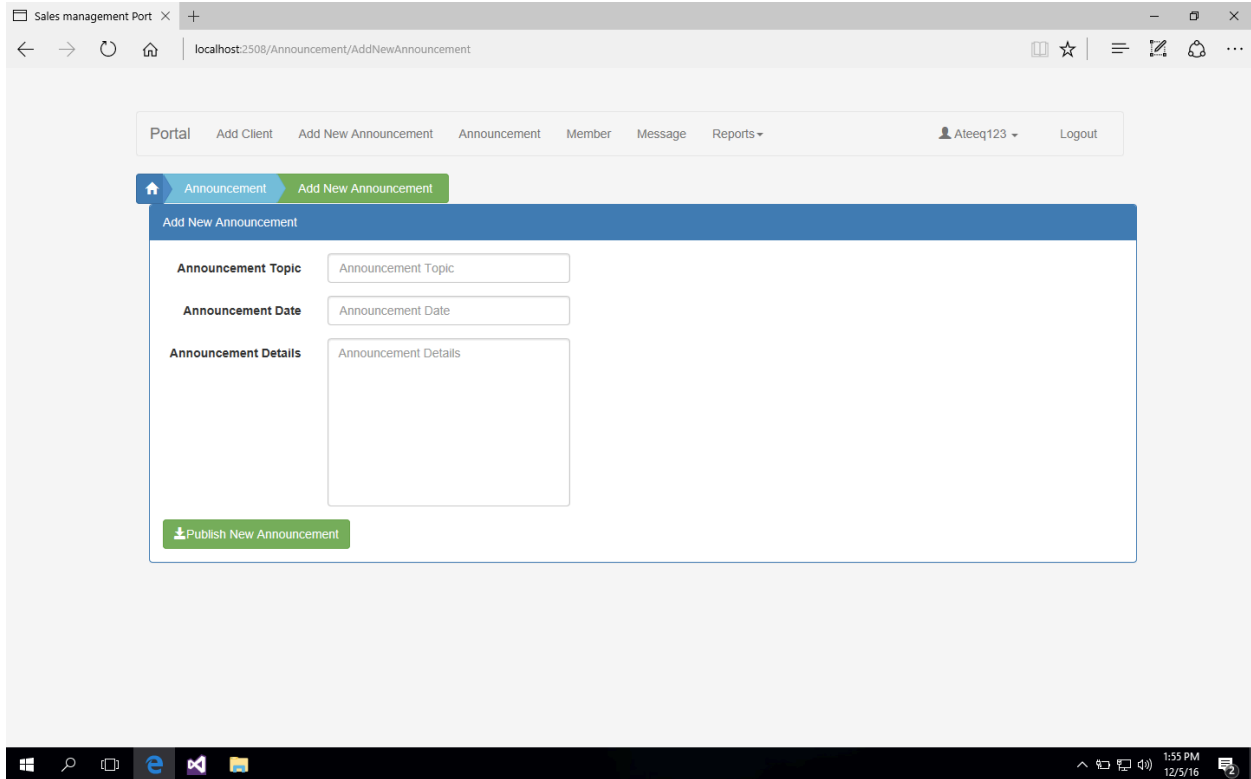
### Add New Proposal

Proposal Name	<input type="text" value="Proposal Name"/>
Account Manager	<input type="text" value="Account Manager"/>
Date Added	<input type="text" value="Date Added"/>
Chance To Close	<input type="text" value="Chance To Close"/>
Estimated Budget	<input type="text" value="Estimated Budget"/>
Proposal Duration	<input type="text" value="Proposal Duration"/>
Proposal Amount	<input type="text" value="Proposal Amount"/>
Total Revenue	<input type="text" value="Total Revenue"/>
Proposal Status	<input type="checkbox"/>
Rejection Reason	<input type="text" value="Rejection Reason"/>
Contact Name	<input type="text" value="Contact Name"/>
Contact Telephone	<input type="text" value="Contact Telephone"/>
Proposal Description	<input type="text" value="Proposal Description"/>

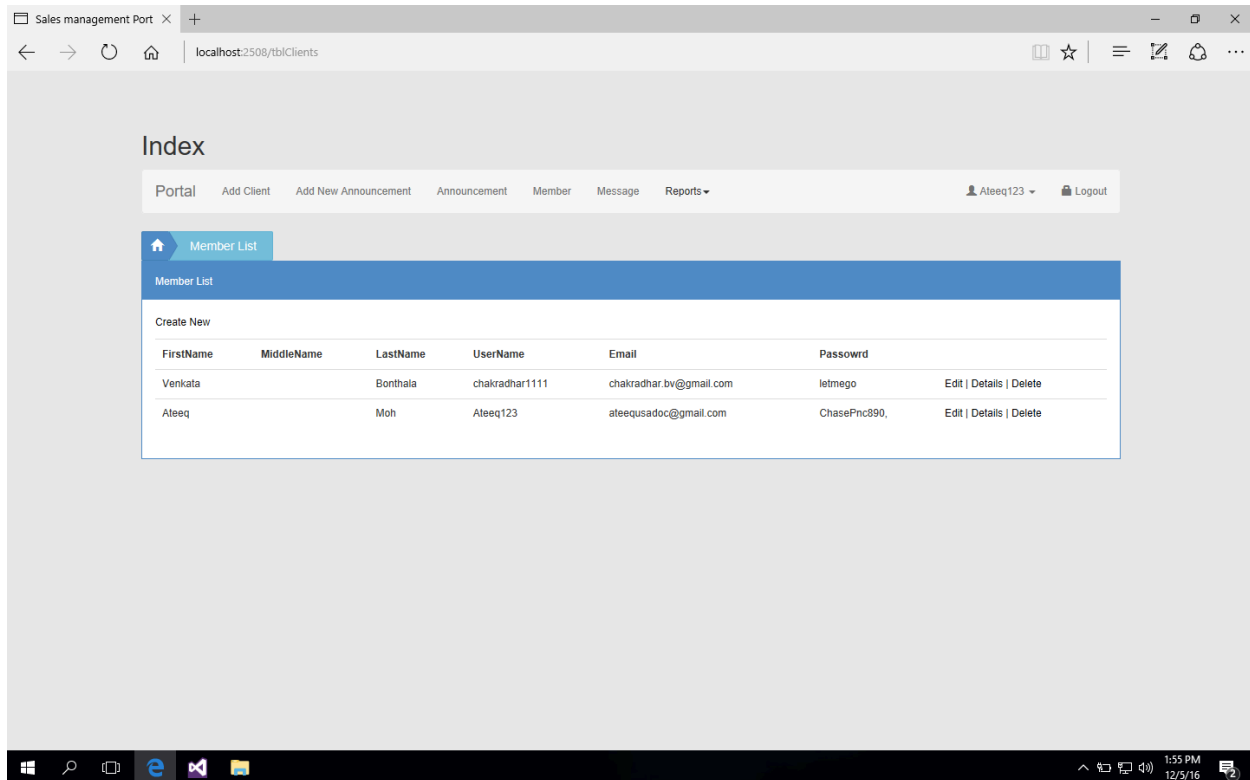
Windows taskbar: 1:54 PM 12/5/16



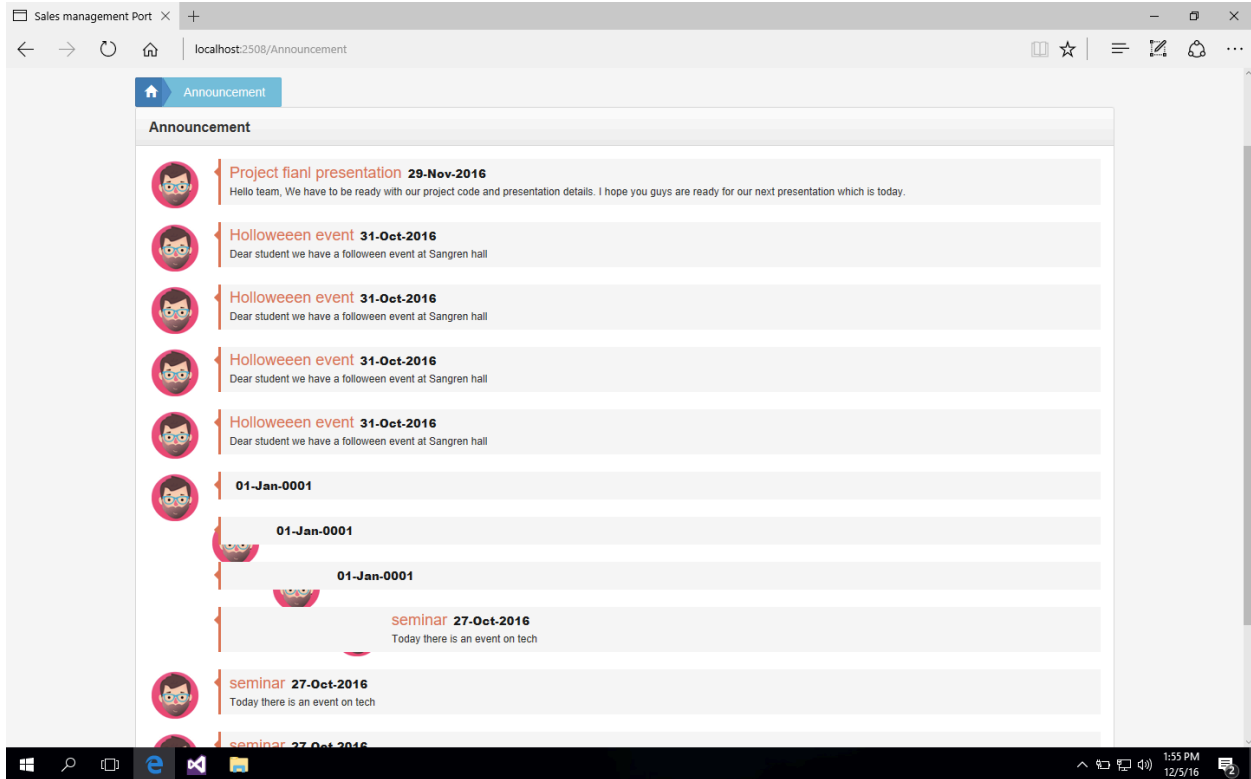
The above screen gives information about the project name, project manager, Project budget, Project description.



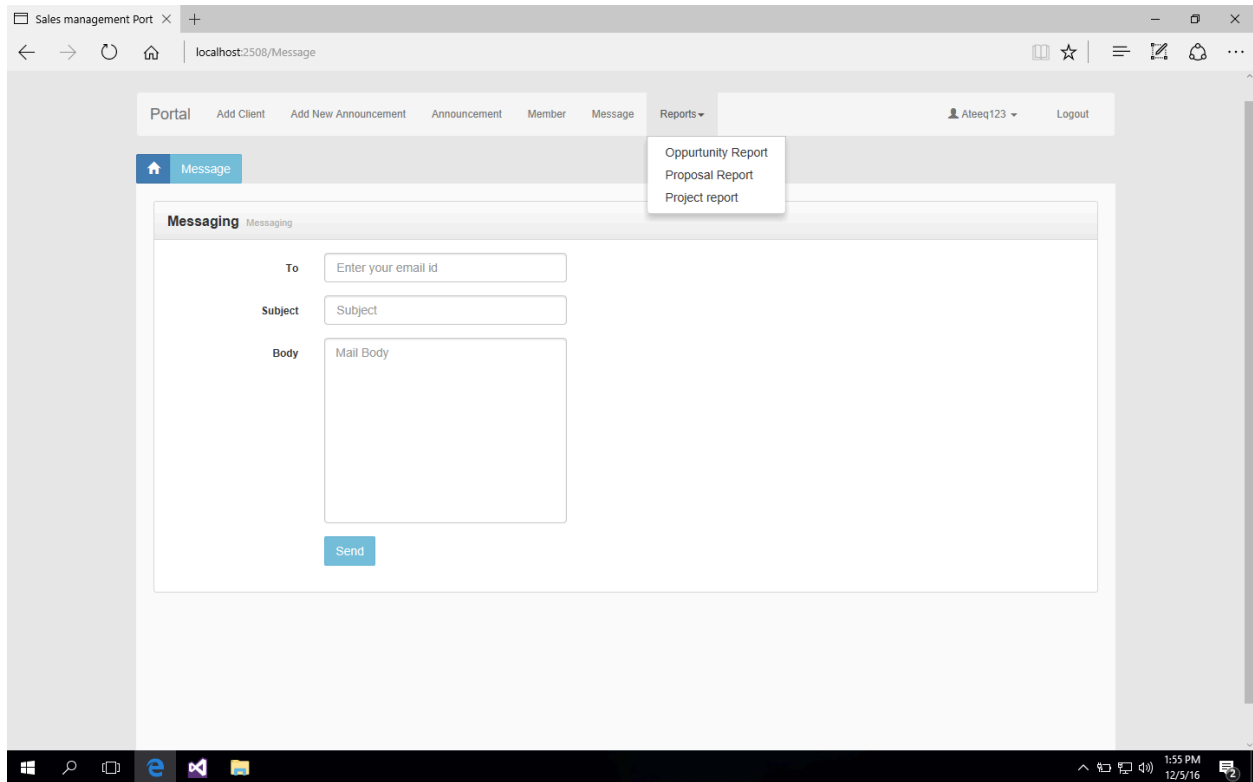
The above screen tells us about the announcement section. This is a best way to send notifications to all the users about the meetings, discussions, daily activities and more.



The above screen gives us information about the accounts that created on this system and their details. If you want to change password or delete user, this page will be helpful.



The above screen tells us about the notifications that created or posted.



This page is useful to create message and send it to a single user

Sales management Port x localhost:2508/tblOppurtunities

Portal Add Client Add New Announcement Announcement Member Message Reports Ateeq123 Logout

Oppurtunity Reports Export To Excel

OppurtunitiesName	Addedy	DateAdded	ChanceToClose	EstimatedBudget	OppurtunityDuration	OppurtunityType	ContactName	Contacttelephone	OppurtunityDescription	OppurtunityNotes
		29-Nov-2016	%			Iphone 7				
		04-Nov-2016	%			Iphone 7				
ASD	ASD	28-Oct-2016	%			Iphone 7				
		28-Oct-2016	%			Iphone 7				
		28-Oct-2016	%			Iphone 7				
		25-Oct-2016	%			Iphone 7				
		25-Oct-2016	%			Iphone 7				
		25-Oct-2016	%			Iphone 7				
		25-Oct-2016	%			Iphone 7				
		25-Oct-2016	%			Iphone 7				

1:56 PM 12/5/16

This page will give detailed information about the project deals that made and its status.

Sales management Port X + localhost:2508/tblProposals

Portal Add Client Add New Announcement Announcement Member Message Reports Aleeq123 Logout

Proposal Reports Export To Excel

ProposalName	AccountManager	DateAdded	ChanceToClose	EstimatedBudget	ProposalDuration	ProposalBudget	TotalRevenue	ProposalStatus	RejectionReason	ContactName	ContactTelephone
		29-Nov-2016	%					false			
		04-Nov-2016	%					false			
3EFEFFV		28-Oct-2016	%					false			
		28-Oct-2016	%					false			
		28-Oct-2016	%					false			
		25-Oct-2016	%					true			
		25-Oct-2016	%					false			
		25-Oct-2016	%					false			
		25-Oct-2016	%					false			

1:56 PM 12/5/16

Sales management Port X + localhost:2508/tblProjects

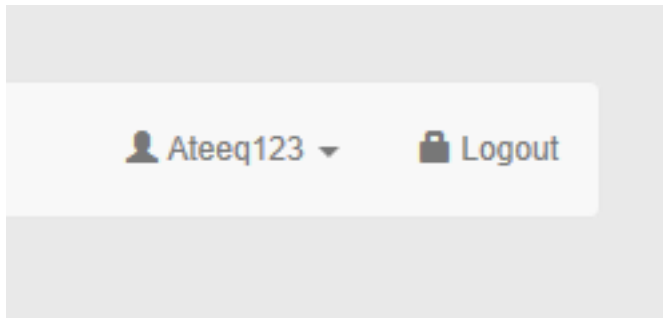
Portal Add Client Add New Announcement Announcement Member Message Reports Aleeq123 Logout

Project Reports Export To Excel

ProjectName	ProjectManager	DateAdded	ProjectAmount	TotalRevenue	ProjectDuration	ProjectStatus	LaunchName	ContactName	ContactTelephone	ProjectDescription	ProjectNotes
		29-Nov-2016					29-Nov-2016				
		04-Nov-2016					04-Nov-2016				
SALES PORTAL		28-Oct-2016					28-Oct-2016				
		28-Oct-2016					28-Oct-2016				
		28-Oct-2016					28-Oct-2016				
		25-Oct-2016					25-Oct-2016				
		25-Oct-2016					25-Oct-2016				
		25-Oct-2016					25-Oct-2016				
		25-Oct-2016					25-Oct-2016				

1:56 PM 12/5/16





If a user wants to know which user is logged into the system, then we can see it from here. And if a user wants to logout from the system then we can simply click on logout.

A screenshot of the Visual Studio IDE showing the source code for a web application. The code is in the 'MenuLayout.cshtml' file. The code defines a Bootstrap navbar with a toggleable menu. The user's name 'Ateeq123' is displayed in the navbar, and there is a 'Logout' button. The code is as follows:

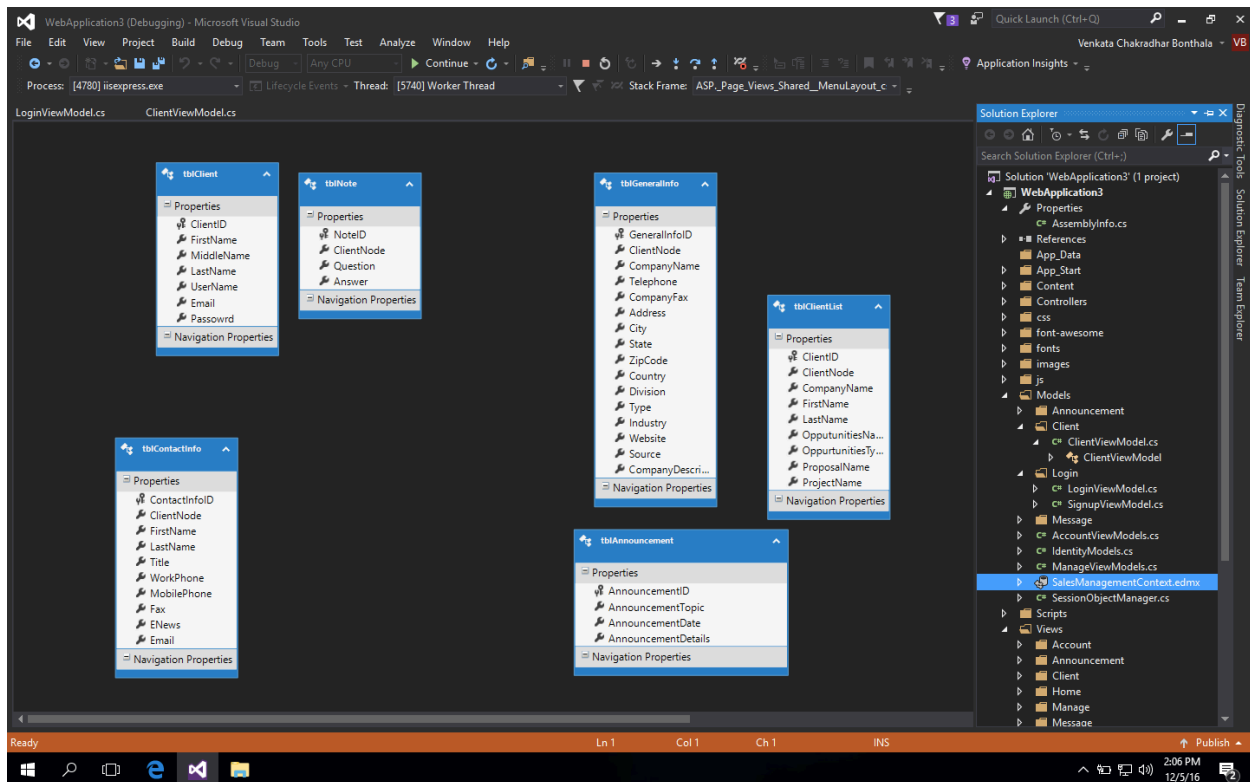
```
7 }
8 </script>
9
10 <nav class="navbar navbar-default">
11   <div class="container-fluid">
12     <!-- Brand and toggle get grouped for better mobile display -->
13     <div class="navbar-header">
14       <button type="button" class="navbar-toggle collapsed" data-toggle="collapse" data-target="#bs-example-navbar-collapse-1" aria-expanded="false">
15         <span class="sr-only">Toggle navigation</span>
16         <span class="icon-bar"></span>
17         <span class="icon-bar"></span>
18         <span class="icon-bar"></span>
19       </button>
20       <a class="navbar-brand" href="@Url.Action("Contact", "Home")">Portal</a>
21     </div>
22     <div class="collapse navbar-collapse" id="bs-example-navbar-collapse-1">
23       <ul class="nav navbar-nav">
24         <li><a href="@Url.Action("Index", "Client")">Add Client</a></li>
25         <li><a href="@Url.Action("AddNewAnnouncement", "Announcement")">Add New Announcement</a></li>
26         <li><a href="@Url.Action("Index", "Announcement")">Announcement</a></li>
27         <li><a href="@Url.Action("Index", "tblClients")">Members</a></li>
28         <li><a href="@Url.Action("Index", "Message")">Message</a></li>
29       </ul>
30       <li class="dropdown">
31         <a href="#" class="dropdown-toggle" data-toggle="dropdown" role="button" aria-haspopup="true" aria-expanded="false">Reports<span class="caret"></span></a>
32         <ul class="dropdown-menu">
33           <li><a href="@Url.Action("Index", "tblOpportunities")">Opportunity Report</a></li>
34           <li><a href="@Url.Action("Index", "tblProposals")">Proposal Report</a></li>
35           <li><a href="@Url.Action("Index", "tblProjects")">Project report</a></li>
36         </ul>
37       </li>
38     </ul>
39     <ul class="nav navbar-nav navbar-right">
40       <li class="dropdown">
41         <a class="dropdown-toggle" role="button" data-toggle="dropdown" href="#"><i class="glyphicon glyphicon-user"></i> @Session["ClientName"].ToString() <span class="caret"></span></a>
42         <ul>
43           <li></li>
44           <li><a href="#" onclick="UserLogout();"><i class="glyphicon glyphicon-lock"></i> Logout</a></li>
45         </ul>
46       </li>
47     </ul>
48   </div>
49 </nav>
```

The screenshot displays the Microsoft Visual Studio IDE with a C# code file named `ClientLoginViewModel.cs` open. The code defines a `ClientLoginViewModel` class within the `WebApplication3.Models` namespace. The class includes several properties: `UserName` (required, non-blank), `Password` (required, non-blank), `RememberMe` (boolean), and `ErrorMessage` (string). The code is as follows:

```
1  using System;
2  using System.Collections.Generic;
3  using System.ComponentModel.DataAnnotations;
4  using System.Linq;
5  using System.Text;
6  using System.Threading.Tasks;
7
8
9
10 namespace WebApplication3.Models
11 {
12     public class ClientLoginViewModel
13     {
14         /// <summary>
15         /// Username
16         /// </summary>
17         [Required(ErrorMessage = "Username can't be left blank")]
18         public string UserName { get; set; }
19         /// <summary>
20         /// Password
21         /// </summary>
22         [Required(ErrorMessage = "Password can't be left blank")]
23         public string Password { get; set; }
24         /// <summary>
25         /// RememberMe
26         /// </summary>
27         public bool RememberMe { get; set; }
28         /// <summary>
29         /// ErrorMessage
30         /// </summary>
31         public string ErrorMessage { get; set; }
32     }
33 }
34
```

The IDE interface shows the file explorer on the left with the project structure, the code editor in the center, and the status bar at the bottom indicating the current cursor position (Ln 1, Col 1, Ch 1, INS) and a 'Publish' button.

The above screens denote about the C# coding that implemented for different pages.



The above screen gives information about the database tables that we created for this design.

## 4. Project Design Description

### PROJECT FUNCTIONALITY

- ❖ User login and logout
- ❖ User authenticate and authorization
- ❖ Dashboard with Current Client List
- ❖ Current Client Details View
- ❖ Search Client List by Client Name and opportunities type.
- ❖ Add New Client
- ❖ Add New Announcement
- ❖ Announcement Details View with Date Wise
- ❖ Website navigation
- ❖ Responsive Design
- ❖ Websites Cookie maintain

## 5. Internal/external Interface Impacts and Specification

No impacts

## 6. Design Units Impacts

No impacts

### 6.1 Functional Area A/Design Unit A

#### 6.1.1 Functional Overview

- All the users who uses this portal will get notified about the important information through notification option. This makes easy for the users prepare for the task after getting notified. And, also its beneficial to managers to intimate users by a single message.
- Manager can make notes related to the project. So, that he can check his important information that stored in the notes. This makes easy to manager that he cannot miss any information during the project deal.
- Manager can send messages to all the users by using message option. This makes easy to manager that he can convey his information by using message option.
- Manager can store all the information about the project and can export all the information to an excel file. This makes easy to send information through email to others.
- Manager can edit, view and delete information this makes manger to trash information which is not necessary or no use.

#### 6.1.2 Impacts

No impacts

#### 6.1.3 Requirements

In this project, we have provided the features like,

A search option, where manager user can track information of clients and all the users. Which was a major requirement.

Manager Console: Manager can create user accounts, can send messages and view details

Pipeline Reports: Manager can run various reports such as,

- List of prospects
- Reports of opportunities
- By date, by month, sales person

## 6.2 Functional Area B/Design Unit B

### 6.2.1 Functional Overview

In this project, we have provided the features like,

A search option, where manager user can track information of clients and all the users. Which was a major requirement.

Manager Console: Manager can create user accounts, can send messages and view details

Pipeline Reports: Manager can run various reports such as,

#### **PROJECT FUNCTIONALITY**

- ❖ User login and logout
  - ❖ User authenticate and authorization
  - ❖ Dashboard with Current Client List
  - ❖ Current Client Details View
  - ❖ Search Client List by Client Name and opportunities type.
  - ❖ Add New Client
  - ❖ Add New Announcement
  - ❖ Announcement Details View with Date Wise
  - ❖ Website navigation
  - ❖ Responsive Design
  - ❖ Websites Cookie maintain
- 
- This project reduces the time that takes to search for the clients, users in the database.
  - All the users who uses this portal will get notified about the important information through notification option. This makes easy for the users prepare for the task after getting notified. And, also its beneficial to managers to intimate users by a single message.
  - Manager can make notes related to the project. So, that he can check his important information that stored in the notes. This makes easy to manager that he cannot miss any information during the project deal.
  - Manager can send messages to all the users by using message option. This makes easy to manager that he can convey his information by using message option.
  - Manager can store all the information about the project and can export all the information to an excel file. This makes easy to send information through email to others.
  - Manager can edit, view and delete information this makes manger to trash information which is not necessary or no use.

### **6.2.2 Impacts**

No impacts.

### **6.2.3 Requirements**

A search option, where manager user can track information of clients and all the users. Which was a major requirement.

Manager Console, Manager can create user accounts, can send messages and view details

Pipeline Reports: Manager can run various reports such as,

- List of prospects
- Reports of opportunities
- By date, by month, sales person

## **7. Open Issues**

No open issues

## **8. Acknowledgements**

This document created by myself. I would like thank my professor Mr. Liu and Miss Nancy Rios who helped me in creating this document.

## **9. References**

All references should include, author, title of document, doc ID# and issue date.

## **10. Appendices**

No appendices

