Software Requirements Specification

for

<OCS Portal>

Version 1.0

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FF Steel

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Revision History

Name	Date	Reason For Changes	Version

1. Introduction

1.1 Purpose

The purpose of the OCS Portal is to provide a comprehensive and efficient solution for managing and documenting sales queries. This web-based platform is designed to streamline the process of handling sales-related inquiries, ensuring a systematic and organized approach to customer interactions.

1.2 Intended Audience and Reading Suggestions

This document can be use by the below audience

a. Developer
b. Tester
c. Project Manager

To keep the clear understanding of the document, below are the full form of acronym used in this document.

a. **OCS:** Officer Customer Service
b. **HH:** House Hold
c. **COB:** Close of business
d. **HOS:** Head of Sales
e. **CMO:** Chief Marketing Officer
f. **CSO:** Chief Sales Officer
g. **CEO:** Chief Executive Officer
h. **CRM:** Customer Relationship Management
i. **BP:** Business Partner
j. **IC/CS:** Incharge CS

1.3 Project Scope

The OCS Portal is envisioned as a dynamic web-based application specifically developed for the OCS team. The primary objective is to streamline the process of maturing sales queries, with a focus on enhancing customer engagement and fostering continued business relationships. The scope of the project is delineated as follows:

a. **Query Maturation:**
   It provides a centralized platform for managing and progressing queries. OCS team can tag the queries to sales persons.
b. **Customer Retention:**
   A key aspect of the system is its capability to assist the OCS team in identifying and tracking disengaged customers. By doing so, the portal aims to facilitate targeted efforts to re-engage and sustain business relationships with existing customers.
c. **Data Categorization:**
   This feature enhances the efficiency of data management, enabling quick access to relevant information and improving overall workflow.
d. **Automated Follow-Up Reminders:**

The system will incorporate automated reminders for follow-up activities, ensuring that users stay informed and proactive in managing customer interactions.

e. **Reporting:**
   The Head CS will have access to comprehensive reports generated by the system. These reports will offer insights into team performance, query maturation metrics, and other relevant key performance indicators.

2. Overall Description

2.1 Product Perspective

The development of the OCS Portal is an ongoing process that involves regular updates and the addition of new features to enhance its functionality and address emerging needs.
The OCS Portal's development is a dynamic process that involves both updates to refine existing features and the integration of new functionalities to meet evolving user needs. This iterative approach ensures that the product remains a cutting-edge solution for the organization's customer support and relationship management efforts.

2.2 Operating Environment

The OCS Portal is designed to operate within a specified environment to ensure optimal performance, security, and compatibility. The operating environment encompasses both hardware and software requirements, providing a stable foundation for the seamless functioning of the portal. Below are the key components of the operating environment:

a. **Web Server:**
   The web-server used in OCS Portal will be XAMP installed on 1.2 server (windows server)

b. **Database Management System:**
Depending on organizational preferences and infrastructure, Microsoft SQL Server will be used for database management.

c. **Client Devices:**
End-users can access the OCS Portal through standard web browsers such as Google Chrome, Mozilla Firefox, Safari, or Microsoft Edge.

d. **Web Development Framework:**
The portal is developed using a specific web development framework, such as Laravel.

e. **Dependencies:**
   a. **Module Integration:**
      The OCS Portal will be integrated with CRM, to get the disengaged customer and tag the queries to the concerned sales person.

   b. **Third-Party Libraries:**
      The portal may utilize third-party libraries or frameworks, and their compatibility with the chosen development stack must be maintained during updates.

3. System Features

Below are the main features of the system provided in OCS Portal.
IC/CS will work as a reliever of absent officer CS

3.1 Dashboard:

On dashboard display the below details

3.1.1 Graphs:

Head CS can view the performance of the team members on the dashboard in Graphs

- Monthly
    - Who has tagged the queries
    - Number of queries
    - Matured queries
- Daily
    - Who has tagged the queries
    - Number of queries
    - Matured queries

3.2 Disengaged Customer:

- Those customers will come in the domain of OCS Team,

Condition 1:

- Have not done business with us from the last 60 days.
- No Pending Order.
- Not Suspended/blacklisted. (They can also be accommodated if they would like to purchase on 100% advance payment)
- No Visit from Sales Team in last 30 days (Physical Visit).

Condition 2:

- After the 1st sale from OCS, the bp will be treated as condition one. Otherwise, sales team will make the sale order.

Condition 3:

- Customers that have not purchased for 120 days or above will also fall in CS domain regardless of Sales team visit.
- Ledger balance is less than or equal to zero

Reports

- Daily auto report should be emailed to Head CS, CMO, CSO.
- On demand exporting of report to be enables for Head CS.

3.2.1 Today Disengaged Customer Details

a. Total number of disengaged customers for today's follow-up should be shown on dashboard

b. User will get the option to fetch the data on the basis of center

   i. Center 1

   ii. Center 2

   iii. North

   iv. South

c. A list of all today disengaged customers should be shown after clicking on the center (**mentioned in point b**)

   i. Card Code

   ii. BP Name

   iii. Contact Number

   iv. Number of days of disengagement

   v. Type of Customer (HH/Retailer/Corporate)

   vi. Contact Person

   vii. Center

   viii. Current Ledger Balance

   ix. Total number of Sales with selected customer

   x. Last Dispatched Project

   xi. Last Dispatched Quantity

   xii. Last Dispatched Date

xiii. Name of FF Sales Person Assigned

xiv. Contact of FF Sales Person Assigned

xv. Remarks Option

xvi. Radio button options

1. Send Sales Person - Customer Has Demand (Tag sales person)
2. Send Sales Person – Customer Has Reservations (Tag sales person)
3. Future Follow-up– Set Reminder for follow-up call. (Select date for future reminder)
4. Customer has No Demand
5. Power Off/ Not Responding (Appear again in tomorrow today's disengaged customer follow-up)
6. Invalid Number (transfer it to MSO)

xvii. Summary of previous visits done by sales person to same customer on the basis of date except telephonic visits

1. Date of visit
2. Sale person name
3. Purpose of visit
4. Remarks of sales person
5. Liaison person in CRM should be fetched in the portal
6. Contact number of liaison person

d. User can transfer the today's disengaged customer for future follow-up by selecting the date.

e. The disengaged customer will appear in today's follow-up on the basis of selected date either sales person visits him or not (**mentioned in point e)**

f. The not-responding disengaged customers will keep appearing in the list of today disengaged customers

g. After tagging the query to the sales person, if customer does not purchase from FF. It should appear after 30 days

h. **Customer has no demand** Should appear after 30 days, if no sales person has visited him in these 30 days

3.2.4. Future Follow-Up:

a. User will get the option to fetch the data on the basis of center

    i. Center 1

    ii. Center 2

    iii. North

    iv. South

b. A list of all future follow-up disengaged customers should be shown after clicking on the center (**mentioned in point a**)

    v. Card Code

    vi. BP Name

    vii. Contact Number

    viii. Number of days of disengagement

    ix. Type of Customer (HH/Retailer/Corporate)

    x. Follow-up date

    xi. Contact Person

    xii. Center

    xiii. Current Ledger Balance

    xiv. Total number of Sales with selected customer

    xv. Last Dispatched Project

    xvi. Last Dispatched Quantity

    xvii. Last Dispatched Date

    xviii. Name of FF Sales Person Assigned

    xix. Contact of FF Sales Person Assigned

    xx. Description of follow-up

    xxi. Summary of previous visits done by sales person to same customer on the basis of date except telephonic visits

        1. Date of visit

        2. Sale person name

        3. Purpose of visit

4. Remarks of sales person
5. Liaison person in CRM should be fetched in the portal
6. Contact number of liaison person

OCS team can shift the query to today's follow-up from future follow-up

3.2.5 Tag Sales Person & Reservations Tag Sale Person:

a. User will get the option to fetch the data on the basis of center

i. Center 1
ii. Center 2
iii. North
iv. South

b. A list of all Tag Sales Person disengaged customers should be shown after clicking on the center (**mentioned in point a**)

i. Card Code
ii. BP Name
iii. Contact Number
iv. Tagged Sales Person Name
v. Sale Person Contact Number
vi. Date of tagging
vii. Contact Person
viii. Type of customer
ix. Center
x. OCS Description
xi. Current Ledger Balance
xii. Total number of Sales with selected customer
xiii. Last Dispatched Project
xiv. Last Dispatched Quantity
xv. Last Dispatched Date

xvi. Summary of previous visits done by sales person to same customer on the basis of date except telephonic visits

1. Date of visit
2. Sale person name
3. Purpose of visit
4. Remarks of sales person
5. Liaison person in CRM should be fetched in the portal
6. Contact number of liaison person

3.2.6 Invalid Number:

Show list of invalid numbers of customer added by the OCS team. Invalid customer should not show again for follow-up

3.3 New Customers

New customers will be added in the portals. OCS team will assign those new customers to themselves who are interested to buy the steel. OCS team will make the advance order through CRM.

- Daily auto report should be emailed to Head CS, CMO, CSO.
- On demand exporting of report to be enables for Head CS.

3.3.1 Customer Type Search Option:

3.3.2 Add new Customer:

User will be able to add the new customer by entering below details in the form

a. BP Name
b. Category
c. Customer Type
d. Project City
e. Contact Person Name
f. Mobile Number
g. Phone Number (Optional)
h. Current Project name
i. Position
j. Email (Optional)

3.3.3 New Customer Follow-up:

a. Total number of new customers for today's follow-up should be shown on dashboard

b. User will get the option to fetch the data on the basis of team member (Head CS will get the new customers team wise)

c. A list of all today new customers should be shown after clicking on the team member (**mentioned in point b**)

- Card Code
- BP Name
- Contact Number
- Type of Customer (HH/Retailer/Corporate)
- Contact Person
- Center
- Current Ledger Balance
- Total number of Sales with selected customer
- Last Dispatched Project
- Last Dispatched Quantity
- Last Dispatched Date
- Name of FF Sales Person Assigned
- Contact of FF Sales Person Assigned
- Remarks Option
- Radio button options
  - Send Sales Person - Customer Has Demand (Tag sales person)
  - Future Follow-up– Set Reminder for follow-up call. (Select date for future reminder)
  - Customer has No Demand
  - Power Off/ Not Responding (Appear again in tomorrow today's disengaged customer follow-up)
  - Invalid Number (Transfer to MSO for number verification)

b. User can transfer the today's new customer for future follow-up by selecting the date.

c. The new customer will appear in today's follow-up on the basis of selected date (**mentioned in point f)**

d. The not-responding new customers will keep appearing in the list of today new customers follow-up.

e. After tagging the query to the sales person, if customer does not purchase from FF. It should appear after 30 days

f. **Customer has no demand** Should appear after 30 days

3.3.4 Future Follow-up New Customer

a. User will get the option to fetch the data on the basis of team member (Head CS will get the new customers team wise)

b. A list of all future new customers should be shown after clicking on the team member (**mentioned in point a**)

- Card Code
- BP Name
- Contact Number
- Type of Customer (HH/Retailer/Corporate)
- Contact Person
- Center
- Current Ledger Balance
- Total number of Sales with selected customer
- Last Dispatched Project
- Last Dispatched Quantity
- Last Dispatched Date
- Name of FF Sales Person Assigned
- Contact of FF Sales Person Assigned
- Description of the OCS
- Follow-up Date

OCS team can shift the customer to today's follow up from future follow-up

3.3.5 Tag Sale Person New Customer:

a. User will get the option to fetch the data on the basis of team member (Head CS will get the new customers team wise)

b. A list of all tagged new customers should be shown after clicking on the team member (**mentioned in point a**)

- Card Code
- BP Name
- Contact Number
- Type of Customer (HH/Retailer/Corporate)
- Sale Person Tagged
- Tagged Date
- Contact Person
- Center
- Current Ledger Balance
- Total number of Sales with selected customer
- Last Dispatched Project
- Last Dispatched Quantity
- Last Dispatched Date
- Contact of FF Sales Person Assigned
- Description of the OCS

3.4 Task & Visit:

- Daily auto report should be emailed to Head CS, CMO, CSO.
- On demand exporting of report to be enables for Head CS.

3.4.1 Date Search:

User should be able to fetch the data on the basis of selected date range (start date & end date)

3.4.2 Task & Visit List:

a. IC/ CS will get the option to fetch the data on the basis of center

- Center 1
- Center 2
- North
- South

b. A list of all sales person should be shown after clicking on the center (**mentioned in point a**)

- Code
- Name
- Contact Number
- Email
- Memo
- Description
- Center
- Head

c. After selecting the sales person, his last days task & visit details should be shown

- BP Code
- BP Name
- BP Number
- Total visits

d. User can view the data according to the selected date range

e. User will get below details after selecting any task & visit from the list

- Order dispatch report
- Current ledger balance
- Pending Order quantity
- Ageing report
- Summary of previous visits done by sales person to same customer
    - Images
    - Locations

- Purpose of visits
- Liaison person name
- Liaison person number
- Date of visit
- Remarks of sales person

f. OCS Team will be able to the give remarks about the visit

g. OCS team will select any of the option

- Compliant
- Non-Compliant
- Not Responding (Appear tomorrow again for feedback)

3.4.3 Task & Visit Pending for Validation:

User will get the option to fetch the data on the basis of center

- Center 1
- Center 2
- North
- South

b. A list of all sales person should be shown after clicking on the center (**mentioned in point a**)

- Code
- Name
- Contact Number
- Email
- Memo
- Description
- Center
- Head

c. After selecting the sales person, his pending(marked as non-compliant by the OCS team) task & visit details should be shown

- BP Code
- BP Name
- BP Number
- Total visits
- Remarks of Officer CS
- Officer CS Name

d. User can view the data according to the selected date range

e. User will get below details after selecting any task & visit from the list

- Remarks of Officer CS
- Order dispatch report
- Current ledger balance
- Pending Order quantity
- Ageing report
- Summary of previous visits done by sales person to same customer
    - Images
    - Locations
    - Purpose of visits
    - Liaison person name
    - Liaison person number
    - Date of visit
    - Remarks of sales person

f. Head CS will be able to the give remarks about the visit

g. Head CS will select any of the option

- Compliant
- Non-Compliant
- Not Responding (Appear tomorrow again for feedback)

h. **Compliant Task & Visit:** Shift this task & visit to compliant and system will generate auto email to the sales asking for explanation, keeping 1st and 2nd supervisor, CS Head, CSO & CMO in CC.
i. **Non-Compliant Task & Visit:** Shift this task & visit to non-compliant task & visit.
j. **Not Responding:** Appear tomorrow again for feedback

3.4.4 Task & Visit Compliant:

Those tasks & visits will appear here which are marked as compliant

a. User will get the option to fetch the data on the basis of center

- Center 1
- Center 2
- North
- South

b. A list of all sales person should be shown after clicking on the center (**mentioned in point a**)

- Code
- Name
- Contact Number
- Email
- Memo
- Description
- Center
- Head

c. After selecting the sales person, his all-compliant task & visit details should be shown

- BP Code
- BP Name
- BP Number
- Total visits
- Remarks of Officer CS
- Officer CS Name

d. User can view the data according to the selected date range

e. User will get below details after selecting any task & visit from the list

- Remarks of Officer CS
- Remarks of Head CS
- Order dispatch report
- Current ledger balance
- Pending Order quantity
- Ageing report
- Summary of previous visits done by sales person to same customer
    - Images
    - Locations
    - Purpose of visits
    - Liaison person name
    - Liaison person number
    - Date of visit
    - Remarks of sales person

3.4.5 Task & Visit Non-Compliant:

a. User will get the option to fetch the data on the basis of center

- Center 1
- Center 2
- North
- South

b. A list of all sales person should be shown after clicking on the center (**mentioned in point a**)

- Code
- Name
- Contact Number
- Email

- Memo
- Description
- Center
- Head

c. After selecting the sales person, his non-compliant task & visit details should be shown

- BP Code
- BP Name
- BP Number
- Total visits
- Remarks of Officer CS
- Officer CS Name

d. User can view the data according to the selected date range

e. User will get below details after selecting any task & visit from the list

- Remarks of Officer CS
- Remarks of Head CS
- Order dispatch report
- Current ledger balance
- Pending Order quantity
- Ageing report
- Summary of previous visits done by sales person to same customer
    - Images
    - Locations
    - Purpose of visits
    - Liaison person name
    - Liaison person number
    - Date of visit
    - Remarks of sales person

3.5 Pending Queries:

Queries that are tagged to the sales person but not matured yet.

a. User will get the option to fetch the data on the basis of center

- Center 1
- Center 2
- North
- South

b. A list of all sales person should be shown after clicking on the center (**mentioned in point a**)

- Code
- Name
- Contact Number
- Email
- Memo
- Description
- Center
- Head

c. After selecting the sales person, his pending tagged queries details should be shown

- Card Code
- BP Name
- Contact Number
- Type of Customer (HH/Retailer/Corporate)
- Sale Person Tagged
- Assigned Date
- Remarks of Sales Person
- Contact Person
- Center

- Current Ledger Balance
- Total number of Sales with selected customer
- Last Dispatched Project
- Last Dispatched Quantity
- Last Dispatched Date
- Contact of FF Sales Person Assigned
- Description of the OCS
- Officer CS name

c. Head CS can close the queries by giving remarks

3.6 Matured Queries:

Queries that are matured will be visible to the OCS team.

a. User will get the option to fetch the data on the basis of center

- Center 1
- Center 2
- North
- South

b. A list of all sales person should be shown after clicking on the center (**mentioned in point a**)

- Code
- Name
- Contact Number
- Email
- Memo
- Description
- Center
- Head

c. After selecting the sales person, his pending tagged queries details should be shown

- Card Code
- BP Name
- Contact Number
- Type of Customer (HH/Retailer/Corporate)
- Sale Person Tagged
- Assigned Date
- Contact Person
- Center
- Current Ledger Balance
- Matured Date
- Total number of Sales with selected customer
- Last Dispatched Project
- Last Dispatched Quantity
- Last Dispatched Date
- Contact of FF Sales Person Assigned
- Description of the OCS
- Officer CS name
- Sales Person remarks

3.7 Closed Queries:

Queries that are matured will be visible to the OCS team.

a. User will get the option to fetch the data on the basis of center

- Center 1
- Center 2
- North

- South

b. A list of all sales person should be shown after clicking on the center (**mentioned in point a**)

- Code
- Name
- Contact Number
- Email
- Memo
- Description
- Center
- Head

c. After selecting the sales person, his pending tagged queries details should be shown

- Card Code
- BP Name
- Contact Number
- Type of Customer (HH/Retailer/Corporate)
- Sale Person Tagged
- Closed Date
- Contact Person
- Center
- Current Ledger Balance
- Assigned Date
- Total number of Sales with selected customer
- Last Dispatched Project
- Last Dispatched Quantity
- Last Dispatched Date
- Contact of FF Sales Person Assigned
- Description of the OCS

- Officer CS name
- Head CS remarks
- Sales Person remarks

3.8 Reports:

OCS team can view their previous days working as per selected date

4. Other Nonfunctional Requirements

4.1 Performance Requirements

The system must support a predefined number of concurrent users without significant degradation in performance. The OCS Portal should exhibit low latency, with response times for user interactions such as query maturation, data categorization, and report generation kept within acceptable limits.

4.2 Safety Requirements

Implement robust access controls to ensure that users have appropriate permissions. Role-based access should be enforced to limit unauthorized access to sensitive information.

4.3 Software Quality Attributes

Fields should accept the correct data and proper checks should be applied on the fields before accepting and saving the data in the database.