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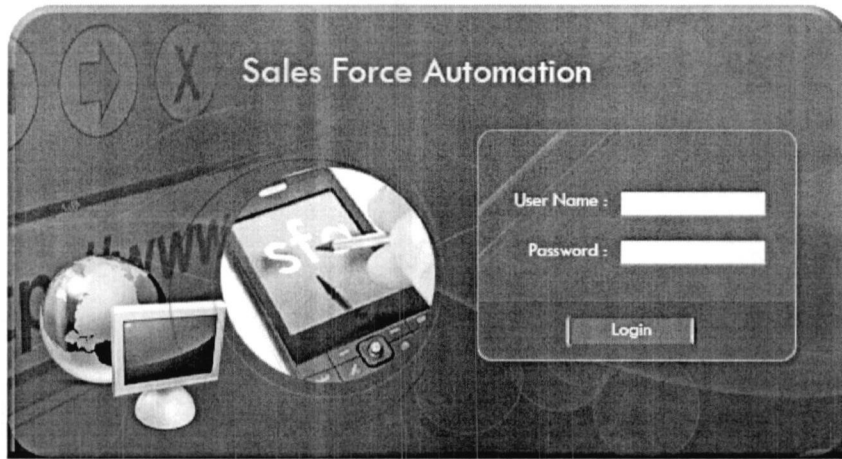
[10] www.computerweekly.com/.../2008/.../Special-Report-Gartner- A Framework for Evaluating Sales Force Automation Functionality”, Gartner, 2008

Appendixes

Appendix A

Sales Force Automation- Web Portal User manual

1. Login



User has to enter user name and password to login

1. Master Data



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2.1. Locality Structure

User can add/edit or delete nodes to the locality structure

2.1.1. Add Node to Locality Structure

Click on \pm at the position where it is required to add a new node

Locality Type Name - The name for the locality node

Description - Description of locality type

1.2. Agent Structure

2.2.1. Add New Node to The Agent Structure

Select the relevant hierarchy from the drop down

Click on \pm at the position where it is required to add a new node

2.2.2. Edit Node in the Agent Structure

Click on **±** at the position where it is required to edit a node

Then change the values in the form appropriately

2.2.3. Delete Node in the Agent Structure

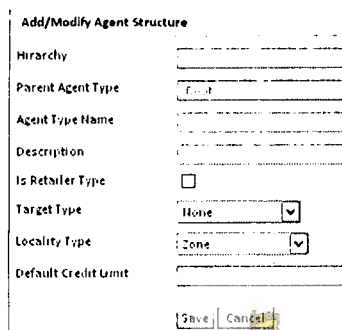
Click on **±** at the position where it is required to delete a new node

Click on the delete button

2.2.4. Create a New Agent Hierarchy

Click on “Create New Hierarchy” button

Then fill the form appropriately



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Hierarchy : Name of the distribution structure

Parent agent type : By default it is the root (for a new agent structure) but for an existing agent structure, it is the name of the parent node

Agent type name : The name of the agent

Description : Description of agent structure

Is retailer type : Whether this agent is a retailer

Target type : Whether agent has targets and if so, sales target or purchase target

Locality type : Locality type in the locality structure

Default credit limit : Whether the agents of this type has a limit on credit

2.3.1. Create Locality

Click “Create Locality” to add a locality to a selected parent locality as above

Add/Modify Locality Structure

Parent

Locality Name

Short Code

Description

Locality Type ▼

Is Active

Parent : This is the parent locality

Locality Name : Name of the locality

Short code : Short code for the locality

Description : Description of the locality

Locality type : Locality type from the locality structure



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2.3.2. Create Root Locality

Click “Create Locality” to add a root locality. It is same as the previous scenario, but only difference is that the parent is “Root”

2.3.3. Edit

Click “Edit” to change the existing data

2.3.4. Delete

Click “Delete” to delete a locality

3. Agent Management

3.1. View Agent

View / Edit Agent

Agent Name:

Parent Agent Name: Browse

Agent Type Hierarchy:

Agent Type:

Locality:

Category:

Class:

Type Group (Discount Group):

Address:

Contact No:

Credit Limit:

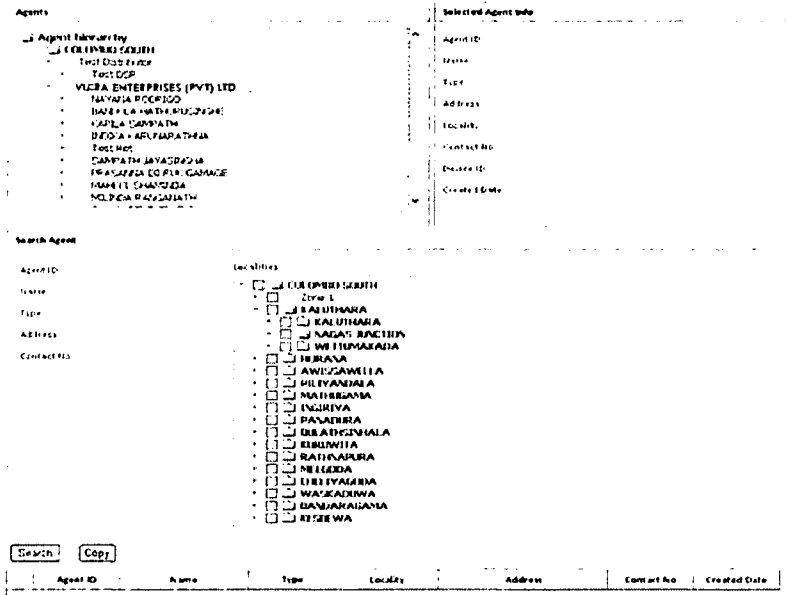
Deposit Amount:

Deposit Comment:

Save Cancel

- Agent name** : Name of the agent
- Parent agent name** : Name of the parent of the agent
- Agent Type Hierarchy** : Select the relevant agent structure
- Agent Type** : Select the agent type in the previously selected agent structure
- Locality** : Localities associated with the selected agent type
- Category** : Category of the agent (e.g. stores, pharmacy, communication)
- Class** : Class of the agent (A, B, C, D)
- Type Group** : Type of discount group to which agent belongs (e.g. top sellers, bad sellers etc)
- Address** : Address of the agent
- Contact No** : Contact No of the agent
- Credit limit** : Credit limit of the agent
- Deposit amount** : Amount required to deposit

3.2. Search Agent



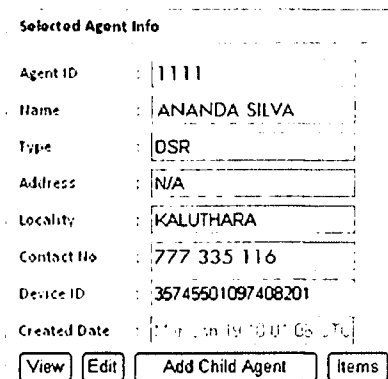
There are three sections in the interface i.e. agents, selected agent info, search agent

3.2.1 Agents

An agent has to be selected from this window. Then the details (Agent ID, Name, Type, Address, Locality, Contact No, Device ID and Created Date) will appear in Selected Agent Info window

3.2.2 Selected Agent Info

The selected agent details will appear in this window



It is possible to view agent details, edit agent details, add child agents and items assigned to distributors.

3.2.3 Edit Agent

Once Edit Agent is clicked, the same screen as above will appear but with editable fields

3.2.4 Add New Child Agent

The selected agent will be displayed as the parent and it is possible to add another agent under that

View / Edit Agent

Agent Name: _____

Parent Agent Name: _____

Agent Type Hierarchy: _____

Agent Type:

Locality: _____

Category:

Class:

Type Groups (Discount Group):

Address: _____

Contact No: _____

Credit Limit: _____

Deposit Amount: _____

Deposit Comment: _____

Is Active:



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3.2.5 View Assigned Items

This is applicable only for distributors i.e. it is possible to view the items assigned to distributors

Name: Athana Agency	Category: Pharmacy
Agent Type: Distributor	Type: Top sellers
Contact No: 77 725 839	Class: A
Locality: COLOMBO METRO	Status: Active

Inventory Status		Assigned Items for Agent	
Signal 80g	Allocated: 0 Utilizable: 1527	6	Surf Excel 500g
Signal 125g	Allocated: 0 Utilizable: 220	7	Signal 125g
Lipton 100g	Allocated: 0 Utilizable: 0	5	Lipton 100g
Lipton 250g	Utilizable: 588 Allocated: 0	0	Rin 250g
Lux Soap	Utilizable: 71	1	Lux Soap
Rin 500g	Utilizable: 60 Allocated: 0	2	Rin 500g
Sunlight Soap	Utilizable: 2 Allocated: 0	3	Sunlight Soap

Name, agent type, contact no, locality, category, type, class and status of the distributor is displayed

It is possible to assign items for the distributor by selecting an item from the drop down

3.3. Create Route

Routes are created for retailers.

Select Locality : Select a locality

Select Distributor : Select a distributor associated with locality

Select DSR : Select a DSR associated with the distributor

Enter a name for the route

Then the list of retailers associated with DSR will be displayed.

Route Creation for Retailers

Select Locality: [Select a locality] [v]

Select Distributor: [Select a Distributor] [v]

Select DSR: [Select a DSR] [v]

Enter Route Title: []

Retailers List

Retailers w/o Routes

Save Cancel

3.4. Assign Route

Assign Route

Select Locality: [Select locality] [v]

Select Distributor: [] [v]

Select DSR: [] [v]

Select a Point: [] [v]

DSR Route Day List

DSR	Route	Day	Delete
-----	-------	-----	--------

Select a locality : Select a locality
 Select a Distributor : This will show the distributors associated with the selected locality and it is necessary to select one
 Select a DSR : This will show the DSRs associated with Distributors & required to select one
 Select a Route : Selecting a route
 Day : Select the days of the week applicable for the route
 Once routes are assigned to the retailers, they are displayed under DSR Route Day List

3.5. Search Route

Route Inquiry

Select Locality:

Select Distributor:

Select DSR:

Retainers List

Route Title	Retainers	Edit	Delete
-------------	-----------	------	--------



Select locality : Select a location (associated with distributors)
 Select Distributor : Select a distributor
 Select DSR : Select a DSR
 Then the relevant routes will be displayed along with retailers in each route
 It is possible to edit or delete the retailers
 Once the edit button is clicked, Retailers in that route are displayed

Retailers

- Raja Stores
- Sunil's Groceries
- Nawalanka Stores
- Multifarm
- Lal Groceries
- Saman Stores
- Lanka Foods
- Multyfarm
- Jayasiri Stores
- Ranawan Groceries

Once the 'delete' link is clicked, retailer agents will be removed from the route

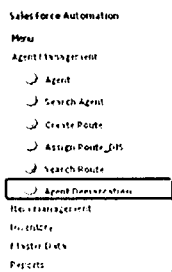
3.6. Agent Demarcation

The demarcation feature allows a parent – child relationship to be changed.

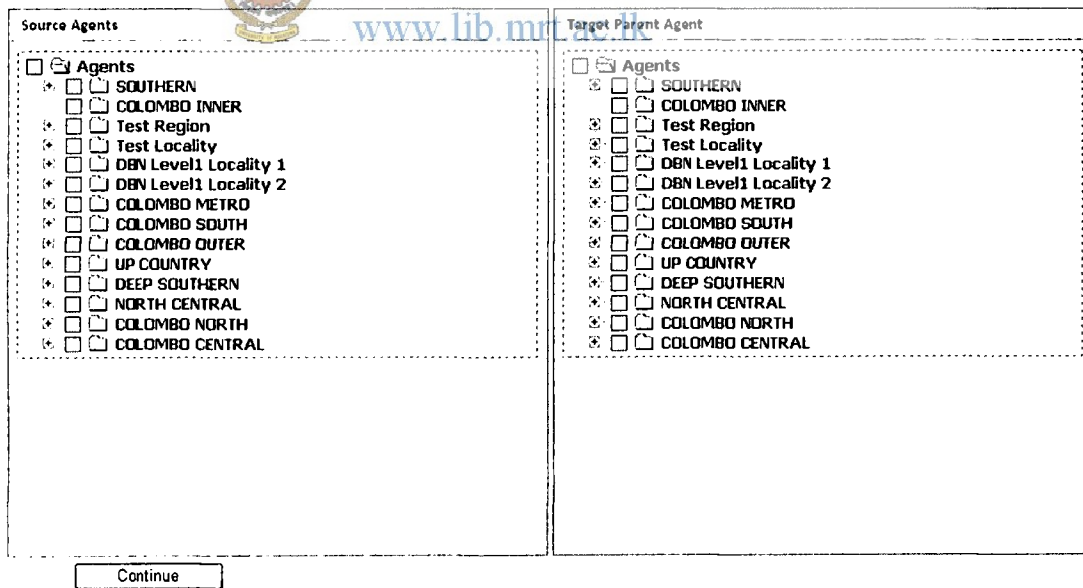
For example, a Retailer from DSR 1 can be shifted to DSR 2. Likewise, a DSR under Distributor 1 can be shifted to Distributor 2. Likewise the parent-child relationships can be modified as required.

Note: An agent can be shifted only within the same hierarchy level.

Select the demarcation option by clicking on the "Agent Demarcation" menu item

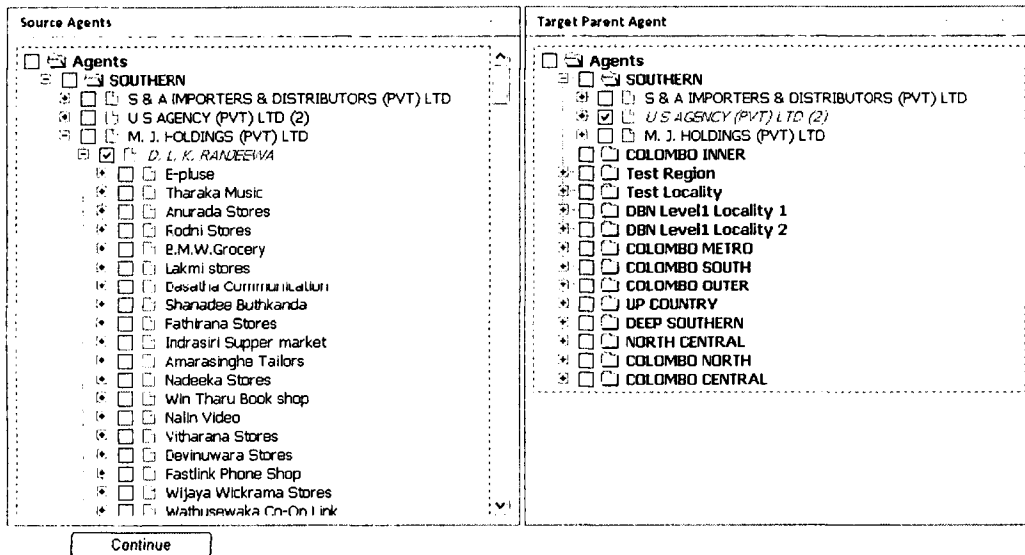


The Following screen will be displayed



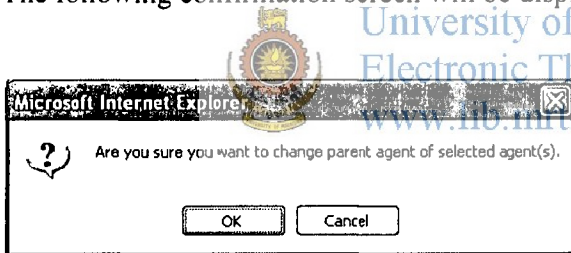
Select the child agent you wish to change from the "Source Agents" box as displayed in the below figure

Thereafter, select the parent under which the child agent will be tagged from the “Target Parent Agent” box.



Click on the “Continue” button to proceed.

The following confirmation screen will be displayed. Click on the “Ok” button to continue.



The following screen will be displayed

If required, select the agent’s new locality in the “New Locality” drop down. Else, the locality will remain unchanged.

Agent ID	Name	Address	Locality	Contact No	Current Parent	New Parent	New Parent Locality	New Locality	New Route	Children																												
28143	D. L. K. PANJEEVA	N/A	DEMAYAYA	777333190	28209	28142	SOUTHERN	No Change		<table border="1"> <thead> <tr> <th>Agent ID</th> <th>Name</th> <th>Locality</th> <th>New Locality</th> </tr> </thead> <tbody> <tr> <td>28902</td> <td>E-pluse</td> <td>DEMAYAYA</td> <td>No Change</td> </tr> <tr> <td>28903</td> <td>Tharaka Music</td> <td>DEMAYAYA</td> <td>No Change</td> </tr> <tr> <td>28937</td> <td>Anurada Stores</td> <td>DEMAYAYA</td> <td>No Change</td> </tr> <tr> <td>28928</td> <td>Roddu Stores</td> <td>DEMAYAYA</td> <td>No Change</td> </tr> <tr> <td>28941</td> <td>B.M.W. Grocery</td> <td>DEMAYAYA</td> <td>No Change</td> </tr> <tr> <td>31691</td> <td>Lakmi stores</td> <td>DEMAYAYA</td> <td>No Change</td> </tr> </tbody> </table>	Agent ID	Name	Locality	New Locality	28902	E-pluse	DEMAYAYA	No Change	28903	Tharaka Music	DEMAYAYA	No Change	28937	Anurada Stores	DEMAYAYA	No Change	28928	Roddu Stores	DEMAYAYA	No Change	28941	B.M.W. Grocery	DEMAYAYA	No Change	31691	Lakmi stores	DEMAYAYA	No Change
Agent ID	Name	Locality	New Locality																																			
28902	E-pluse	DEMAYAYA	No Change																																			
28903	Tharaka Music	DEMAYAYA	No Change																																			
28937	Anurada Stores	DEMAYAYA	No Change																																			
28928	Roddu Stores	DEMAYAYA	No Change																																			
28941	B.M.W. Grocery	DEMAYAYA	No Change																																			
31691	Lakmi stores	DEMAYAYA	No Change																																			

Should there be any child agents under the selected agent, the children will be listed as displayed in the above screen. The children will also be transferred to the new parent.

If required, change the locality of the child agents by selecting the required arena from the “New Locality” drop down displayed in front of the relevant child agent. Else, the locality will remain unchanged.

Enter a valid comment in the “Comments” field and click on the “Save Changes” button.

The demarcation will be saved successfully and the user will be navigated to the following screen.

Demarcation Done.

Comments: demarcation change

Buttons: Back, Export To Excel

AGENT_ID	AGENT_NAME	ADDRESS	CONTACT_NUMBER	NEW_PARENT	OLD_PARENT	NEW_LOCALITY	OLD_LOCALITY	DEMA_COMMENT	IS_CHILD	OLD_ROUTE	NEW_ROUTE
28143	D. L. K. RAHJEEWA	N/A	777333190	28142	28209	AKURESSA	DEMAYAYA	Successful :			
28902	E-pluse					- No Change-	DEMAYAYA	NO CHANGE.	CHILD OF 28143		
28903	Tharaka Music					- No Change-	DEMAYAYA	NO CHANGE.	CHILD OF 28143		
28937	Anurada Stores					- No Change-	DEMAYAYA	NO CHANGE.	CHILD OF 28143		



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4. Item Management

4.1. Item Categories

Add / Edit Item Category

Name:

Description:

Sales Order Identifier:

Sales Organization:

Distributor Channel:

Division:

Is Active:

Buttons: Save, Reset

Name : Name of the category

Description : Description of the category

Sales order identifier, Sales Organization, Distributor channel and division values should be taken from the sales division

Is Active : Whether the item category is active

The existing item categories are displayed as below

Name	Description	Status	Excluded from Forecast	Minimum Stock Forecasted	Tangible	
Surf Excel 500g		Inactive	Yes	Yes	No	Select Delete
Signal 125g		Active	Yes	Yes	Yes	Select Delete
Lipton 100g		Active	Yes	Yes	Yes	Select Delete
Rin 250g		Active	Yes	Yes	Yes	Select Delete
Lux Soap		Active	No	No	Yes	Select Delete

Once “Select” link is clicked, the Add/Edit Item Category interface is displayed with existing values

Add / Edit Item Category

Name: Rin 500g

Description: Washing Powder

Sales Order Identifier: 205T

Sales Organization: 1000

Distributor Channel: 1

Division: 0

Is Active:

Save Reset

In order to delete an existing item category, click on the “Delete” link

4.1. Create Item

Add / Edit Item

Item Code:

Item Name:

Description:

Category: [Select a Category]

Unit Of Measure:

Sales Price:

Tax Percentage:

Default Buffer Stock Amount:

Default Return Stock Percentage:

Default Order Level:

Customer Minimum Order Qty:

Save Cancel

- Item Code : This is a system generated code for the item
- Item Name : Name of the item
- Description : Description of the item
- Category : Existing item categories
- Unit of Measure : The basis of measurement
- Sales price : Selling price of the item
- Default buffer stock amount : The buffers stock amount to be kept (by default)
- Customer minimum order quantity : Minimum order quantity for the item

4.3 Search Items

Item Search

Name

Category

Search Results



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It is possible search via Name and Category

Item Search

Name

Category

Search Results

Name	Description	Status
Surf Exel 500g	Surf Exel 500g	Active View Edit
Signal 125g	Signal 125g	Active View Edit
Lipton 100g	Lipton 100g	Active View Edit
Rin 250g	Rin 250g	Active View Edit
Lux Soap	Lux Soap	Active View Edit

By clicking on “View” and “Edit” links, it is possible to view or edit item details (which is explained above)

5. Inventory

5.1 Admin Adjustment

This functionality is given for special admin users from order to change agent stock levels. However this does not have any impact on the distribution hierarchy.

[ADD] Stock Adjustment

Agent Name: [Picker]

Item: [SURF EXEL 000g]

Inventory Section: [None]

Serial Numbers: [] TO: []

QTY: []

Comments: []

[Add]

- Agent Name : Agent can be chosen from the agent picker (as described above)
- Item : Relevant stock item to be adjusted
- Inventory selection : This could be None, Allocated, Utilizable, Special, DSR Returns, DSR Stock Balance
- Serial Numbers : The range of the serial numbers
- QTY : Quantity of the stocks
- Comments : Any other additional information



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5.2 View Stock Status

Inventory Status as of: 20/07/2011 [Change Date]

Inventory Items:

- Signal 80g
- Signal 10 Utilizable 70 DSR Returns 1 Stock Balance 0
- Signal 125g
- Utilizable 10
- Light 100g
- Utilizable 20 DSR Returns 0 Special 0
- Rm 125g
- Stock Balance 0 DSR Returns 0 Utilizable 10011 Special 0

Search Inventory

Item: [Signal 80g]

Inventory Section: [Special]

From Serial: []

To Serial: []

Item Name	Section	Serial Numbers	Qty
<input type="checkbox"/> Signal 80g	Special	25058100001001021 To 25058100001001029	10
<input type="checkbox"/> Signal 80g	Special	10432000100101151 To 10432000100101159	10
<input type="checkbox"/> Signal 80g	Special	104570000100101271 To 104570000100101280	10

Page 1 of 1

Select

It is possible to change the date to view the inventory status. Further details of the stocks could be viewed via the search inventory option (e.g. in the first box, it says there are 30 items, and the composition [10,10,10] is shown

5.3 Inventory Items of History

The screenshot shows the 'Find Item current status' interface. The search criteria are: Item: SIGNAL 80g, Serial Number: 7198800004001033. The 'Find' button is visible. Below the search area, a table displays the transaction history for this item.

DATE	From Serial	To Serial	From	To	Trans. Type
2/11/2011 9:09:25 AM	7198800004000001	7198800004001000	UNIQUE	U.S.AGENCY (PVT) LTD	Acquisition
2/15/2011 9:15:59 AM	7198800004001001	7198800004001500	U.S.AGENCY (PVT) LTD	T. A. R. D 'Amha	Issue
2/15/2011 9:15:58 AM	7198800004001001	7198800004001500	U.S.AGENCY (PVT) LTD	T. A. R. D 'Amha	Acquisition
2/18/2011 7:59:51 PM	7198800004001001	7198800004001500	T. A. R. D 'Amha	U.S.AGENCY (PVT) LTD	CR-Return
2/18/2011 7:59:52 PM	7198800004001001	7198800004001500	U.S.AGENCY (PVT) LTD	T. A. R. D 'Amha	Direct Issuance
2/19/2011 9:33:34 AM	7198800004001033	7198800004001033	U.S.AGENCY (PVT) LTD	New Man es Farm fresh	Sales

6. Reports

6.1. Sales Billing Information

Sales Billing Information Report

Select Locality:

Select Distributor:

Select DSR:

From period:

To period:

Select a locality, Distributor, DSR and time period


Page 1 of 4 100% Selected format Print

Agent Name: L. H. Munasinghe
 Sales Billing Information
 Locality: Dehawala
 Report period: 01/01/2011 - 31/01/2011
 Created By: carmen

		Surf Eal 500g	Signal 125g	Upzon 100g	Rin 250g	Lux Soap	Sunsik 100ml	Total
Raja Stores	QTY	10				15,000		15,000.00
	Value	4,620.00				14,100.00		
Sun's Groceries	QTY					20,000		18,800.00
	Value					10,650.00		
Navalanka Stores	QTY			1	5	25,000	1	26,504.00
	Value			3,720.00	450.00	23,520.00	1,134.00	
Multifarm	QTY	80				10,000		17,820.00
	Value	7,620.00				9,450.00		
Lal Groceries	QTY	10						960.00
	Value	950.00						

6.2 Inventory Status of Agents and Item

It is necessary to select the locality, agents in locality and related items. It is also possible to include child agents or not.


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Inventory Status of Agents and Item	
Locality	<select locality>
Select Agent(s)	
Include Child Agents	<input checked="" type="checkbox"/>
Item	<select item>
View Report	

Inventory as hand as at 31/01/2011

Created On

01/02/2011 2:52:21 PM

Created By

sadmin

Agent: U S AGENCY (PVT) LTD

Agent Type: Distributor

Form: KIT (3)

Agent	Locality	Allocated	Utilizable	Inventory Section		
				DSR Returns	StockBalance	Special
ASHANE AGENCY			4,800			
A. De Silva			400	50		
C. D. Pathirana			630			
W. Chathura			1,170	900		
H. L. Panara			450			
K. Witharana			10			
C. Samarasinghe						
E. Silva						
H. M. Warwickita			600			
J. Athoda			200			
K. D. Jayathilaka			30			
P. C. Adikari			400	20		
Total			8,770	1,050		

6.3 Sales Outlet Category Report

The inputs for the report are locality, distributor, DSR and time period

Sales Outlet Category Report

Select Locality:

Select Distributor:

Select DSR:

From period:

To period:



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Sales outlet category report

Agent Name: L. H. Munasinghe

Locality: Dehiwala

Report period: 01/01/2011 - 31/01/2011

Created By: sadmin

CODE	Outlet Name	Sales Values	Grade
179	Raja Stores	15,160.00	B
3483	Sun's Groceries	4,800.00	C
926	Nawatanka Stores	8,751.00	C
1029	Multifarm	960.00	C
121	Lal Groceries	960.00	C
943	Saman Stores	10,530.00	C
727	Lenka Foods	14,300.00	C
720	Mullyfarm	4,800.00	C
8927	Jayasiri Stores	1,920.00	A
833	Ranawana	5,400.00	A
159	Shalika Stores	4,700.00	C
201	Bandhuda Groceries	2,050.00	C
117	Athula Stores	2,080.00	C

6.4 Transactions

This report shows the past transactions and could be queried by type, time period, agent IDs and stock item name

- Type : Select the transaction type (Customer Order, Direct Issuance, DSR Direct Sales, DSR Item Return, Issue, Requisition, Sales, Transfer)
- From Date, To Date : Time period for which the report should be generated
- From Agent ID : Agent ID from which the transaction was initiated
- To Agent ID : Agent ID to which the transaction was done
- Item : Stock items in the system

Type: From Date: To Date:
 From Agent ID: To Agent ID:
 Item: Status:

Search

Trans Ref. Code	Trans Type	Date	From	To	From Serial	To Serial	QTY.
111301	Sales	04/01/2011 10:00:32 PM	L. H. Munasinghe	Raja Stores	Surf Excel 500g 5195400001000424	5195400001000452	30
					Lipton 100g 46780000003001239	46780000003001260	22
111302	Sales	07/01/2011	Munasinghe		Surf Excel 500g 5195400001000458	5195400001000458	5
					Lux Soap 46780000003001390	46780000003001390	5
111305	Sales	12/02/2011 8:13:07 AM	L. H. Munasinghe	Lal Groceries	Sunilk 100ml 51083000001002051	51083000001002090	30
					Lux Soap 46780000003001261	46780000003001300	40
111308	Sales	22/02/2011 8:22:45 AM	L. H. Munasinghe	Saman Stores	Surf Excel 500g 51083000001002101	51083000001002130	30
					Signal 125g 51083000001002081	51083000001002100	20
					Lipton 100g 46780000003001381	46780000003001400	20
					Lux Soap 46780000003001301	46780000003001310	10

6.5 DSR Sales Billing Info Report

Sales Billing Info Report

Select Locality:

Select Distributor:

From period:

To period:

Agent Name: Ashane Agency
 DSR Sales Billing Information
 From: 01/01/2011 - 01/02/2011
 Created By: sadmsn

		Surf Excel 500g	Signal 125g	Lipton 100g	Rin 250g	Lux Soap	Surf Excel	Knorr Bottle	Sunlight 250g
A. De Silva	QTY	1,638	60	35	20	5		1,051,000	
	Value	348,493.00	14,250.00	32,950.00	1,980.00	1,125.00		987,340.00	32
C. D. Pathirana	QTY	2,260	28	9	5	4		988,000	
	Value	216,960.00	8,650.00	6,370.00	450.00	900.00		928,720.00	18
W. Chathurug	QTY	2,518	26	6				757,000	
	Value	240,967.00	8,175.00	5,580.00				711,580.00	1
H. L. Perera	QTY	2,278	22	98		5		723,500	
	Value	211,920.00	5,225.00	9,300.00	450.00			680,880.00	17
K. Witharana	QTY	2,428	19	29				884,000	
	Value	232,329.00	4,512.50	26,970.00				755,760.00	18
C. Samarasinghe	QTY	2,800	10	21		8		663,000	
	Value	268,800.00	2,375.00	19,530.00		1,800.00		588,820.00	18
E. Silva	QTY	2,338	26	53				891,000	
	Value	223,680.00	8,650.00	48,290.00				378,340.00	23
H. M. Waravitta	QTY	3,300	22	6		11	2	912,000	
	Value	316,800.00	5,225.00	5,580.00	990.00	450.00		657,280.00	25
J. Almeda	QTY	2,928	47	33				678,000	
	Value	280,320.00	11,162.50	30,490.00			900.00	629,800.00	43
Total	Value	24,448	262	292	41	93	1	6,989,500	197
		2,348,243.00	82,225.00	187,860.00	3,890.00	4,275.00	900.00	6,434,930.00	197


6.6 DSR Sales Summary

Sales Force Automation

- Menu
- Agent Management
- Item Management
- Inventory
- Reports
 - Sales Billing Information
 - Inventory Status Of Agents And Item
 - Sales Outlet Category Report
 - Transactions
 - DIS Sales Billing
 - DSR Daily Summary

Agent (DSR):

Date:



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Agent (DSR):

Date:

14 4 of 1 100% Find | Next Select a format Export

DSR Daily Summary

Distributor: ERANGI AGENCY (PVT) LTD
 DSR: Chamal Liyanarachchie
 Territory: MORATUWA
 Date:

Item ID	Item Name	Opening Stock	Purchases	Total	Sales	Ret. Returns / Inv Cancels	DSR Returns	Closing Stock	Selling Price	Sale Value
1	Signal 80g								96.00	0.00
2	Signal 125g	3		3				3	236.25	0.00
3	Lipton 100g	15		15	4			11	378.00	1,512.00
4	Rin 125g	7		7	4			3	930.00	3,720.00
5	Sunlight Soap								90.00	0.00
6	Surf Excel 200g								225.00	0.00
										141,000.00

Appendix B

Sales Force Automation- PDA User Manual

1. User Login

The DSR's can login to the application by entering their user ID and password



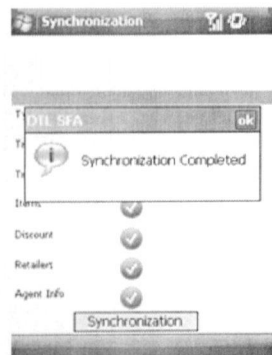
2. Synchronization

When the DSR is successfully logged in, he has to synchronize data with the server by clicking the "synchronization" button



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Once the synchronization is completed, the following information message will be displayed



Thereafter it will be directed to the main interface which consists of pages for sales, inventory, settings and reports.

3. Sales

There are four main items in the sales page i.e. Retailer, Sales, DSR Returns and Stock Balance



3.1 Retailer

It is possible to view the retailer details under the particular DSR.



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3.2 Sales

This screen facilitates the generation of Invoice, No sales. Select the retailer from the drop down list

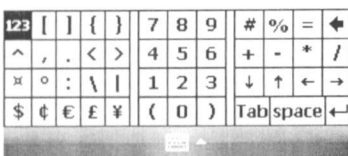
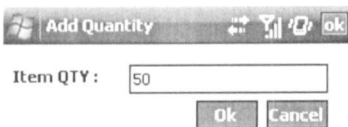


Click and hold on a particular row in order to add quantity for the sale.



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Once "ADD QTY" is clicked, it will be required to enter the quantity



Then the quantity will be added to the respective column.

	UOM	TAX	A.QTY	QTY	Item
	1	0	979	50	4800
	1	0	74	0	0.00
	1	0	806.90	0	0.00

Customer: Sunil's Groceries

Cash Cheque

Item Total : 0.00
Discount : 0.00
Invoice Total : 0.00

Invoice Print

3.3 Invoice

Once the Invoice button is clicked, it will show the item total value, discounts and invoice total

Item Name	From	To	QTY
Signal 80g	510820000	510820000	50

Item Total : 4800.00
Discount : 0.00
Invoice Total : 4800.00

Nawalanka Stores

Ok Cancel

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When the Ok button is clicked, it will show the following message

Customer: Jayasiri Stores

	UOM	TAX	A.QTY	QTY	Item
	1	0	979	50	4800

Cash Cheque

Item Total : 4800.00
Discount : 00.00
Invoice Total : 4800.00

Invoice Print

SFA
Successfully Saved, your Invoice Number Is 109217

3.4 DSR Returns

This is concerned with returning the stocks to the distributors by DSRs.



Select a particular record and hold. Then select the “Return QTY” menu item



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Once the “Return QTY” menu option is clicked, the following page will be displayed



Insert the return quantity and click the Save button. Then the following page appears

DSR Returns

Available Items In DSR Stock

Item	QTY	From.#	To.#
Signal 80g	581	5108200	5108200
Signal 125g	495	5195400	5195400
Signal 175g	100	5108300	5108300
Lipton 100g	74	5195400	5195400
Lipton 200g	80690	0	0

DSR Return Stock for Adjustments

Item	Qty	From	To Seri
Signal 80g	81	5108200001	5108200

Click "Save" to save the details

DSR Returns

Available Items In DSR Stock

Item	QTY	From.#	To.#
Signal 80g	581	5108200	5108200
Signal 125g	495	5195400	5195400

SFA

Successfully Returned the DSR Items

Item	Qty	From	To Seri
Lipton 200g	81	5108200001	5108200

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3.5 Stock Balance

Stock balancing is required when it is necessary to change the stock balances without affecting the agent hierarchy

Stock Balance

Available Items In DSR Stock

Item	QTY	From.#	To.#
Signal 80g	500	5108200	5108200
Signal 125g	495	5195400	5195400
Signal 175g	100	5108300	5108300
Lipton 100g	74	5195400	5195400
Lipton 200g	80690	0	0

Adjustments for Stock Balance

Item	Qty	From	To Seri
------	-----	------	---------

Click and hold on a particular record to view the “Return QTY” menu option



Click the “Save” button to include under Adjustments for Stock Balance



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Click “Save” button to save the details. Then the following message will be shown



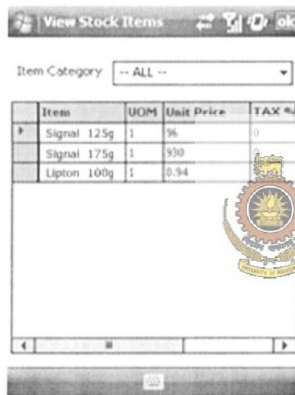
4. Inventory

Inventory view consists of View Items, Acquisition, Sales History and Collection



4.1 View Items

Item category can be selected from the drop down list. Then it will show the item, unit of measure, unit price, re-order level, and quantity



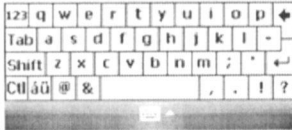
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4.2 Requisition

DSRs could request items from distributors via PDA.



Enter the item quantity



Then the requested items would appear under “Requested Items”

Click “Save” button to save the details and “Reset” to reset the data. When the “Save” button is clicked, a confirmation message will pop up and it is necessary to accept it in order to request items

Item	U.Price	TAX	QTY	Tot
Signal 125g	130	0	2	192

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Finally the following success message will be displayed

Item	UDM	Unit Price	TAX	Re
SSEA		900	0	2

Item	U.Price	TAX	QTY	Tot
Signal 125g	900	0	2	192

4.3 Sales History

It is possible to view the recent visit and sales history. Click on the “Recent Visit” tab to view the transaction details related to the most recent sale



Click on the “History Sales” to view the sales history. Click the “Get Sales History” button



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4.4 Cash Collection

The option is provided for the DSR to record cash collected from retailers.

The cash collection can be accessed after making a sale or can be accessed directly through the “Collection” option in the Inventory tab.



Select the “Sales” option in the Sales tab
 Enter and invoice the sale.
 The below payment screen will be displayed.



To record cash collections select the “Payments” option
 Enter the relevant details.

Customer : Enter the customer from the provided drop down list

Bank : Select the relevant bank

Balance : If the total sales amount is not paid, the remaining amount will be displayed

Amount : The sales amount will be displayed. If required the amount may be changed

Payment Method : Select the relevant payment method from the drop down list.

Depending on whether the payment was made by cash or cheque the relevant option can be selected.



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5. Settings

This page consists of Create Retailer, Settings, Add Retailer, Overall Sync and Change Password



5.1 Create Retailer

Retailers could be added temporarily to the system by DSRs.

A screenshot of the 'Create New Retailer' form. The form has a title bar with 'Create New Retailer.' and navigation icons. It contains five input fields: 'Agent Id' (empty), 'Name' (empty), 'Address' (empty), 'Locality' (containing 'TECHNICAL'), and 'Contact No.' (empty). There are 'Add' and 'Clear' buttons at the bottom. A watermark logo is visible on the right side of the form.

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Name of the retailer, address, locality and contact no have to be entered. Then the system will generate the Agent Id.

A screenshot of the 'Create New Retailer' form after successful submission. The 'Agent Id' field now contains '3689', 'Name' contains 'Sunil's Groceries', and 'Contact No.' contains '0777337330'. A message box is displayed in the center with the text: 'Agent Created Successfully and Please Assign this Agent to Correct Route.' The 'Add' and 'Clear' buttons are still visible at the bottom.

After adding the retailer, it is required to assign retailer to one of DSR routes. Click “Add” button to add the agent (represented by entered Agent Id) to the route



Route : Duplication

Retailer Agent ID (Eg:- 3474)

3689 Add Clear

Retailer	Address	Agent ID
----------	---------	----------

Save to Route

The following figure shows the status after adding a retailer to a route. Click “Save to Route” to save the details (adding retailer to a route)



Route : Duplication

Retailer Agent ID (Eg:- 3474)

3689 Add Clear

Retailer	Address	Agent ID
Sunil's	No 3,	3689

Save to Route

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5.2 Add Retailer

In order to add a retailer, select the route and insert the agent ID. Then click “Save to Route” in order to add the retailer temporary to the route. This was described in the “Create Retailer” function



5.3 Settings

This will show the 3G/ EDGE/ GPRS status, service provider, signal strength, owner no, owner name and battery status. Also it is possible to back up the PDA database and do a session end.



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5.4 Change Password

User name is already shown and it is necessary to enter the old password, new password and confirmation of the new password



6. Reports

There are four types of reports available in the PDA application namely Sales Summary Report , Requisition Report, Daily Sales, Outlet Status and Sales Summary



6.1 Requisition Report

Requisition report could be taken for both completed and pending transactions and it shows the stock requisitions made by DSR

ID	Date	Item	Qty
250	05/02/2011	Signal 80g	50
251	05/02/2011	Signal 125g	100
254	05/02/2011	Signal 175g	100
255	05/02/2011	Lipton 100g	100
259	05/02/2011	Lipton 200g	50
		Lipton 300g	50
		Sunsilk 100ml	50
261	05/02/2011	Lux 85g	40
		Rin 100g	50
262	05/02/2011	Rin 200g	50
		Signal 125g	50
263	05/02/2011	Signal 175g	70
		Lipton 100g	50

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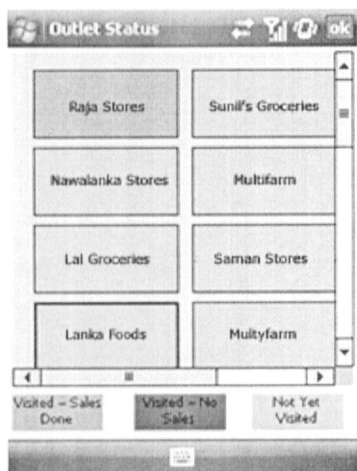
6.2 Daily Sales

This shows the records of daily sales made by DSR

Invoice	Retailer	Discoun	Amount	Pa
1	A. K. P.	0.00	400	C#

6.3 Outlet Status

This shows the outlet status as Visited – Sales Done, Visited – No Sales, and Not Yet Visited with the names



6.4 Sales Summary

This shows a summary of sales done by the DSRs within stipulated period.



Appendix C

Sales Force Automation System – User Acceptance

Please mark a X on the appropriate number that represents your feedback. Avoid the questions which are not applicable

1	2	3	4	5
Very Poor	Poor	Satisfactory	Good	Excellent

You are a

Administrator Agent-Distributor Agent-DSR

Web Interface – User Acceptance

1. Clearly depicts the main menu and the settings 1 2 3 4 5
2. Simplicity of the site 1 2 3 4 5
3. The language and terminology used 1 2 3 4 5
4. The look and feel- imagery, colours 1 2 3 4 5
5. Navigation within the site 1 2 3 4 5
6. Easy to learn and understand 1 2 3 4 5
7. The information provided are clear, concise & informative 1 2 3 4 5

8. The site is user friendly

1	2	3	4	5
---	---	---	---	---

9. Easy to log in to

1	2	3	4	5
---	---	---	---	---

10. Overall appeal of the site

1	2	3	4	5
---	---	---	---	---

PDA Interface – User Acceptance

1. Clearly depicts the main menu and the settings

1	2	3	4	5
---	---	---	---	---

2. Simplicity of the interface

1	2	3	4	5
---	---	---	---	---

3. The language and terminology used

1	2	3	4	5
---	---	---	---	---

4. The look and feel- imagery, colours



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1	2	3	4	5
---	---	---	---	---

5. Navigation within the interface

1	2	3	4	5
---	---	---	---	---

6. Easy to learn and understand

1	2	3	4	5
---	---	---	---	---

7. The information provided are clear, concise & informative

1	2	3	4	5
---	---	---	---	---

8. The Interface is user friendly

1	2	3	4	5
---	---	---	---	---

9. Easy to log in to

1	2	3	4	5
---	---	---	---	---

10. Overall appeal of the site

1	2	3	4	5
---	---	---	---	---

1	2	3	4	5
No	Some what No	Neither Yes or No	Somewhat Yes	Yes

Web Interface – System Usability

1. Easy to find/access fields & information areas

1	2	3	4	5
---	---	---	---	---

2. Easy to enter data

1	2	3	4	5
---	---	---	---	---

3. The system informs errors if any

1	2	3	4	5
---	---	---	---	---

4. The system acts speedily

1	2	3	4	5
---	---	---	---	---

5. The system captures necessary data requirements

1	2	3	4	5
---	---	---	---	---

6. The system allows to change/edit data easily

1	2	3	4	5
---	---	---	---	---

7. The system prompts the data where necessary

1	2	3	4	5
---	---	---	---	---



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PDA Interface – System Usability

1. Easy to find/access fields & information areas

1	2	3	4	5
---	---	---	---	---

2. Easy to enter data

1	2	3	4	5
---	---	---	---	---

3. The system informs errors if any

1	2	3	4	5
---	---	---	---	---

4. The system acts speedily

1	2	3	4	5
---	---	---	---	---

5. The system captures necessary data requirements

1	2	3	4	5
---	---	---	---	---

6. The system allows to change/edit data easily

1	2	3	4	5
---	---	---	---	---

7. The system prompts the data where necessary

1	2	3	4	5
---	---	---	---	---

Thank you for your valuable time and the feedback



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Appendix D

Use Case Specifications

1) Sales Targets Configuration to the System

Description

The company's total sales target for a particular period is fed in to the sales force automation system. The sales division/administrator too feeds the brand wise, product wise, distributor wise target breakdown for the same period

Actors

The company/management, sales division/administrator, DSR's, distributors

Basic flow of events

- 1.The company/management gives the overall target for a period
- 2.Sales division/administrator breaks it down to sub targets and enters the system including pricing, discounts & offers
- 3.The targets are informed to DSR's and distributors at the start of the period (eg: month, quarter) through the system
- 4.The DSR's & distributors do sales based on their target and past sales data

Alternative flow of events

- 1.The system informs the non availability of stocks to all actors

Pre conditions

1. All sales distributors & DSR's need to be linked to the sales force automation system
2. All above actors should be able to check sales information such as types of products, product sizes, available stocks, price, special discounts & offers through the system

Post conditions

1. All above actors should be able to check sales

2) Sales Figures

Description

The daily sales done by DSR's are captured through their PDA and transmitted to the distributor system as well as the company database

Actors

The company/management, sales division/administrator, DSR, distributors

Basic Flow of Events

1. The sales rep enters sales on his PDA
2. The PDA transmits sales figures to the distributor and the company
3. The distributor calculates sales and order stocks for replenishment

Alternative flow of events- None

Pre Conditions

1. The DSR's PDA should be within GPRS, EDGE, 3G coverage areas in order to transmit data



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Post Conditions

1. All above actors should be able to check the target vs achievement on sales

3) Issuance of Stocks

Description

Once the PO is raised the stocks are issued by stores and delivered to the distributor

Actors

Sales division/administrator, distributors, stores

Basic Flow of Events

1. The stores receives the PO
2. The stores check the stock availability
3. The stores issue the stocks

Alternative Flow of Events

1. The stores informs that stocks cannot be issued due to non availability of stocks
2. If the stock are expected soon the PO is held
3. If the stocks are expected to get delayed the PO is cancelled or altered
4. In such scenario (as above point 3) the distributor's and DSR's target is revised

Pre Conditions

1. All products stocks to be updated in the stores system

Post Conditions

1. The distributor receives stocks



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4) Financial Statements

Description

The finance division prepares accounts, finance reports, management reports, distributor & sales representative commissions based on revenue from sales.

Actors

Finance division, the company/management, sales division

Basic Flow of Events

1. Monthly sales revenue is provided by the system
2. Monthly targets are provided by the system
3. The finance division prepare statements based on above

Alternative Flow of Events

1. The finance division does profit calculations based on cost of sales of each product
2. The statements may have to be altered based on revisions in targets

Pre Conditions

1. Targets to be updated in the system

Post Conditions

1. Financial reports and statements

5) Report Generation

Description

Monthly sales figures both value & volume are passed on to the MIS division from the sales force automation system where necessary MIS reports are generated for BI purposes.

Actors

MIS division, the company/management, sales division



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Basic Flow of Events

1. Monthly sales volume & value data is provided by the system
2. MIS division runs different analysis
3. MIS division generates reports

Alternative flow of events

Pre Conditions

1. MIS division to be equipped with a business analytics soft ware

Post Conditions

1. MIS reports to the management & sales division for necessary decision making

6) Monitor Inventory and Stock Situation

Description

The stores need to monitor the inventory and stock situation in order to maintain adequate stocks for sales

Actors

Sales division, Stores

Basic Flow of Events

1. Monthly sales volume are informed to stores
2. Stores system calculates total stocks – sold stocks
3. Stores order more stocks to replenish

Alternative Flow of Events

1. During seasonal periods high amount of stocks will be ordered and kept in anticipation of a sales increase



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Pre Conditions

1. Stores to be equipped with a stock management system

Post Conditions

1. Effective stocks & inventory control system with minimal inventory costs

7) Manage User Roles and Authority

Description

The administrator at the sales division needs to manager user levels, roles & athourity for the sales force automation system

Actors

Sales division/administrator

Basic Flow of Events

1. Identify users/user groups
2. Defines levels for each
3. Define roles for each
4. Set authority levels for each

Alternative Flow of Events

1. Special super user status with special privileges will have to be given to head of sales & head of finance.

Pre Conditions

1. Total system authority to be vested with the administrator

Post Conditions

1. Effective management of the system



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Abbreviations

3G	- 3 rd Generation GSM
B2B	- Business to Business
B2C	- Business to Consumer
BI	- Business Intelligence
BSL	- Base Class Library
CIL	- Common Intermediate Language
CLI	-Common Language Interface
CLR	-Common Language Runtime
CRM	- Customer Relationship Management
CTS	-Common Type System
DBMS	- Database Management Systems
DSR	- Distributor Sales Representative
EDGE	- Enhanced Data GSM Environment
FCL	- Framework Class Library
FIFO	- First In First Out
GPRS	- General Packet Radio Service
HO	- Head Office
IDE	-Integrated Development Environment
IIS	-Internet Environment Service
JIT	- Just In Time
MIS	- Management Information Systems
OS	- Operating system
PC	-Personal Computer
PDA	- Personal Digital Assistant
PO	-Purchase Order
ROI	- Return on Investment
SFA	- Sales Force Automation
SKU	- Stock Keeping Unit



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