

# **SFA Mobile Solution**

## Overview

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**Context:**

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Contacts .....	2
Introduction.....	3
Requirements.....	4
System Modules .....	4
Systems Functionalities.....	6
Administration.....	6
Centralized control.....	6
Centralized management.....	6
Implementation Steps .....	7
Inception.....	7
Elaboration.....	7
Implementation.....	7
Transition .....	7
Module Implementation Stages .....	8
Prototyping.....	8
Final version .....	8
Technical Support.....	8
Appendix 1. System architecture overview.....	9

**Introduction**

SFA, Sales Force Automation, is a solution aimed to connect remotely located persons to their office. Thus, fast access to all information located in the central database, accurate data entrance and storage, full time control over the sales persons powers up the sales process of the company.

Usually, SFA consists of two main parts: handheld computer based and office-based applications. User friendly, easy-to-use handheld application allows sales persons to access to all company's products features, specifications, clients' information and printed documents. Office-based applications are used by operators, managers, warehouse operators, etc ... providing the full control over the data, reports creating, products editing.

Communication between the handheld application and the central office database also might be divided into two groups: direct communication via Internet, SMS, wireless, etc, that is most important for the pre-sale process; and a database synchronization through special programming modules, that is possible to use for the van-sale process. It also possible to combine these two types of communications, thus increasing reliability and sales process speed.

To sum up, the system allows:

- ability to speed up sales process by the sales agent, also providing them with all documents required;
- decrease the time, spent by the sales agent with an every client;
- automatic stock-tacking and calculation;
- decrease the number of possible errors made by the sales agent;

- centralized control of data upload/download;
- centralized data processing and report printing.

## Requirements

Sales Agent's stuff consists of:

- handheld computer, public or industrial, with or without the bar-code reader;
- matrix printer;
- cables;
- converter, to attach the printer and the handheld computer to a car accumulator.

Distributor and the central office stuff consists of :

- one or more Personal Computers, connected by the local network;
- printer;
- handheld computers base (for one or several computers);
- handheld computer charger, one for every computer or industrial;
- cables.

## System Modules

In order to cover all sales processes, Sales Force Automation system consists of several modules. Each module belongs to the sales agent, to the distributor and to a central database. There is no a big difference between the distributor and the central office, though they play a different role.

	Module	Functions	Comments
1.	Handheld Computer Module (for Sales Agent)	Software and hardware that include handheld computer user software, printer driver, handheld computer database, additional utilities.	mandatory
2.	Handheld Computer and Distributor Database Synchronization Module	Internal SFA system module with or without the graphical user interface, that performs at the moment of the handheld computer and PC standard synchronization procedure.	mandatory

3.	Distributor Module	Software and hardware installed in each distributor central office. Might consist of one or several operator sets.	mandatory
4.	Distributor Database Module	Distributor central office database that stores all the data. Some related activities are keeping backups, performing built-in database synchronization issue.	mandatory
5.	Distributor and Central Database Synchronization Module	Import/Export module that is responsible for the synchronization of the databases of several distributors and/or the company central office. In some cases the central office is a distributor and no synchronization required.	optional
6.	Reports/Statistics Generating Module	Built-in or an external software module that is responsible for the reports/statistic generation. User should be able to change reports' templates according their needs.	optional
7.	Web-based reports/Statistic Generating Module	Built-in or an external software module that is responsible for the reports/statistic generation over the company's Intranet.	optional
8.	Integration Module, that allows to communicate with already existing software or hardware	External systems/software, for example warehouse, accounting, integration module.	optional

## **Systems Functionalities**

### **Administration**

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Administrator can set up rights and access privileges to every sales agent and distributors, so that only authorized users are able to perform some particular tasks.

### **Centralized control**

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All actions, taken by the sales agents and distributors staff, are kept in the database. Manager can create a report at any time using this data, so that it allows to impartially estimating the each person's work during the day, the week and the month.

### **Centralized management**

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Operator in the distributor's office is responsible for the data synchronization (uploading and downloading them to/from handheld computer). He or she only needs to initiate this process pressing a single button, everything else will be proceed automatically. The system is keeping the history about synchronization process and it is possible to print them at any time. Operator can create individual or group reports, control the products features, create requests to load tracks.

## **Implementation Steps**

Both the system architecture and the proven software environment are really exist in order to successfully implement the system that fits to client's needs. It is possible to use either PalmOS or PocketPC or both for the handheld module.

However, sales processes of each company are really unique and a system tuning is highly required. According with this fact we are offer an way of the system implementation based on several steps.

### **Inception**

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On this step, Client's Representative and System Analyst are describing existing sales processes. Some processes might be redundant; the other might be required in terms of PC-based sales process. The dataflow also has been investigated.

### **Elaboration**

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Based on the sales process description, gained on the previous step, System Analyst and Client's Representative select the scope of system modules required and describe the functionality of each of them in details.

### **Implementation**

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On this step the real system implementation is performed. Each module is created according the steps described in chapter "Module Implementation Steps". So that it is possible to add a new functionality during the implementation step, if required.

### **Transition**

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Here the step, when the system is installed on client's computers. Modules are installed and the staff will be trained. At this step the results are compared with the initially planned.

## **Module Implementation Stages**

In order to achieve the best result, each module of the system has to be implemented through the several stages. Each stage is characterized by the amount of functions implemented. These stages are: prototyping, final version and technical support.

### **Prototyping**

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At this stage only the main functionality of the module has been implemented. This allows the client to see what they will get, to decide how this fits their requirements, make some changes. In this stage also some additional details might be investigated that were not obvious during Inception and Elaboration steps.

The result of this stage is a semi-functional module that will be used by a client's target group for a while.

### **Final version**

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As a result of the prototype version usage the System Analyst will create the list of additional functionalities that should be included into the final version of the module. There are two types of additional functionalities: enhancements and requirements. Enhancements are definitely will be included into the final version. Requirements are additionally discussed and estimated.

The result of this stage is a completely functional module that will be used by a client's target group for a predetermined period of time. During this time the module might be tuned and fixed.

### **Technical Support**

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The sales processes are not stable. So that it is possible that the client will request to make some changes to better fit the module to the sales process. All these changes are topics to discuss.



### Appendix 1. System architecture overview

