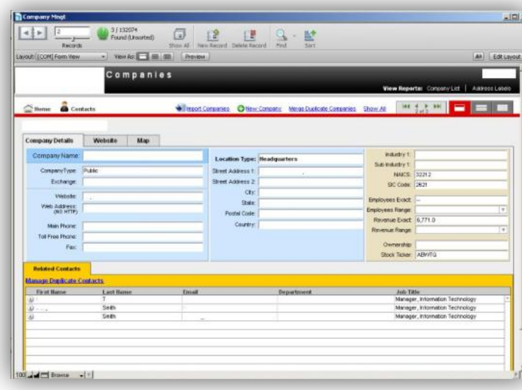
SaleBuild Application in FileMaker

Executive Summary



This case study illustrates about the development of a database application that is used by sales and telemarketing teams of a company to manage the leads that they generate for their clients. The application streamlines their contact discovery and account profiling processes via the project management system built in the application. It also allows team to archive verified contacts and companies in a contact management module in the same application for future references.

The intent of our client to develop such a kind of application was to streamline processes and eradicate the usage of spreadsheets. The numerous modules developed for the application primarily allows access to super users/admin to oversee various tasks related to company, contact, projects, and employees. The client was also interested in report generation for projects and allocation of the same to the concerened person so that it is visible to him once the project has been created.

With their specifications in place, the client was in search of a development partner who can work on it and deliver a very robust and dynamic application using FileMaker. Mindfire was chosen out of many other companies on the basis of their experience in FileMaker and their prompt response. Finally, the application developed helped the client manage various information easily and efficiently.

About our Client

Client Contact Data Management Service Provider | **Location** Canada | **Industry** Small/Medium

Business Situation

The client was after a database application that could streamline processes and eliminate the use of spreadsheets. The application to be developed should be able to manage companies, contacts, projects and employees. In order to manage these fields, the client was interested in developing separate modules for each with access being provided to the super user/admin. The super user/admin would be the only person responsible to add, edit, and manage the modules.

The client was interested to develop the application using FileMaker and had approached various other companies. But, unfortunately he was not satisfied with either their approach or time frame. But, when he discussed his requirements with Mindfire's technical team he was delighted to figure out the experience that Mindfire's offshore FileMaker team possesses. He immediately accepted the proposal and agreed to go ahead with Mindfire's services.

Solution Details

The Mindfire Solution

As per the client's requirement, Mindfire's FileMaker team started discussing to finalize on the proceedings and finally decided to develop the below mentioned modules:

- **Employee Management Module –** This module will store employee information having functionalities like employee addition/search, show all and record navigation and is only accessible by the super user/admin.
- **Company Management Module –** This module to provide provision for only super user/admin to access and will be the master database to store the master list of companies. It will have functionalities such as Add/Upload New Company, Merge Duplicate Companies, Show All, Export Companies.
- **Contact Management Module –** A master database to store master list of contacts and will have functionalities like Import Contacts, New Contact, Manage Duplicate Contacts, Show All, Export Contacts, and Record Navigation. Again it allows access to only the super user/admin.
- **Project Tracking Module -** Accessible by users having the following roles: super-user/admin, manager, requestor, caller and QA. This section of the system will hold each client requests as a project and track tasks related to staffs.
- **Admin Settings / Configuration Module:** There are sections to edit the company's information, view all active employees and export them to external file formats. A section to manage all the custom value lists used in the system.
- **Export:** This has a tab implemented to allow super-user to export contacts by Project, export Companies by Project, export all contacts, and export all companies.

A super user can create a new project for the request made by a client by clicking the "New Project" link from the top header section on the Project Detail/List views. The user can then import the Companies/Contacts list from an excel file given by the client for the project by clicking on an "Import Companies" or "Import Contacts" link from the top header section. Once the project is created then the super-user will assign the project to the manager. A super user avails the facility to view reports such as Caller Report, Manager & QA Team Report, and Productivity Report. Certain functionalities have been made available for other users once the super user assigns a project to the Manager. These details have been provided below:

- **Manager:** Once the project is assigned to the manager, it will be visible to his dashboard. Managers can then enter project related information, add researcher, caller, QA and assign tasks to them. A new functionality called ´Auto Assign Tasks', which enables the manager to auto-assign the tasks to caller/researchers
- **Researcher:** When the task gets assigned to researcher, it will be visible under the project they are assigned to. Researcher will start working on the tasks, which will have a list of company assigned to them along with the target. Researcher needs to do web-search for contact information related to list of company assigned to them and enter into the system.

- **Caller:** When the task gets assigned to caller, it will be visible under the project they are assigned to. Caller will start the verification process for the contacts they are assigned to. Caller can then mark the contact verified or error.
- **QA:** When the task gets assigned to QA, it will be visible under the project they are assigned to. QA will test each and every contact they are assigned to. Caller will then mark the contact approved or error.

Our developers have also worked on enhancement of the application and added some newer functionality like:

- A new user role "HR Manager" is introduced to the application who will review the performance report.
- The contacts will undergo Project Manager's approval once verified by caller. A portal has been developed to keep track of the contact rejection history. The rejected contacts will be reassigned to the Caller.
- The contact will be locked for a resource once it moves to next stage of verification.
- Different search options are provided to the users to find duplicate contacts or companies from the database by matching words or patterns and by phonetics.
- Dynamic portal sorting has been implemented to sort the lists according to the users.
- Integrated an email verification tool to verify contact email address.

Achievements

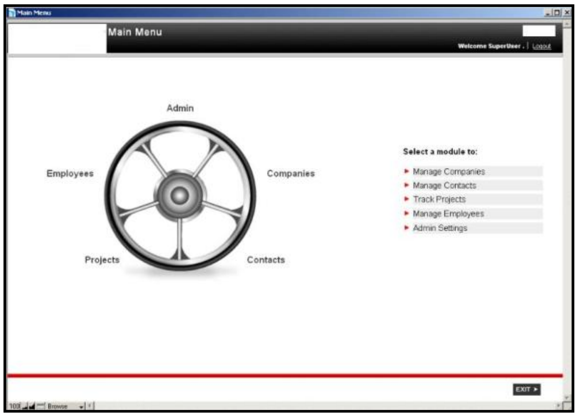
Our FileMaker team had to face numerous challenges during the development phase. As the project was vast with a lot of functionalities involved the task was cumbersome and needed a lot of concentration and dedication for an error free system. Tough task was to understand the specs which needed a lot of mapping and work accordingly. Our team did manage the responsibility well and delivered an application that could meet the objective of the client.

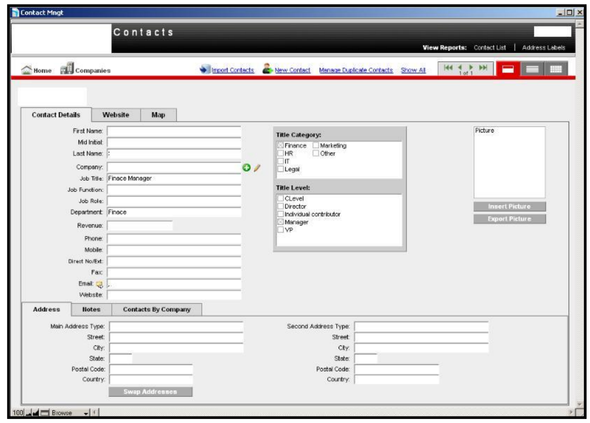
Technologies

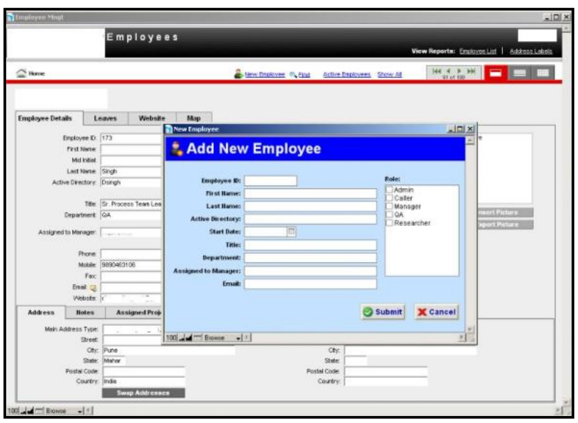
FileMaker Pro 10 Advanced, FileMaker Server 10 Advanced

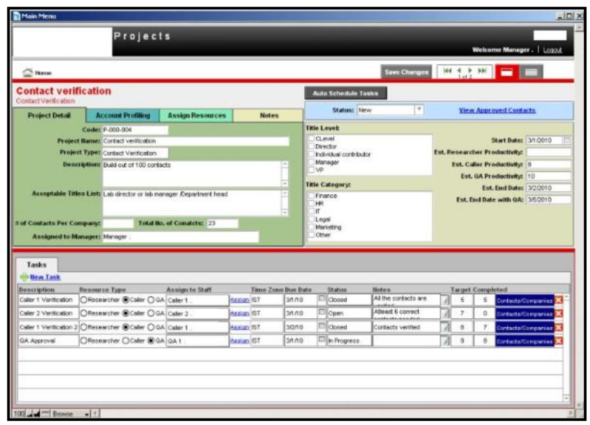
Final Results

Software System









Customer Benefits

The application developed helped the client to overcome the issue of spreadsheet usage and could also efficiently streamline its processes. He was happy about the fact that he received attention to every single issue (small/large) he faced and also the fact that Mindfire delivered a system that exceeded his expectations.

Future relationship

The client allocated all the future enhancement work to Mindfire's FileMaker team and also chose them as an offshore development partner for his future projects.