

Develop Sales Visit Planning & Expense Management Module

07/22/2026 04:41 AM - Yashaditya Singh

Status:	New	Start date:	07/22/2026
Priority:	Normal	Due date:	
Assignee:	Yashaditya Singh	% Done:	0%
Category:		Estimated time:	0.00 hour
Target version:		Spent time:	0.00 hour
Description			
Objective: Develop a Sales Visit Planning module integrated with the existing Expense Management system to enable sales executives to plan site visits, capture visit details, and submit expenses for approval. Business Requirement: Sales executives frequently visit customer locations for site surveys and business development. The system should allow managers to plan visits, assign executives, track visit progress, and manage visit-related expenses using the existing expense approval workflow. Scope: 1. Sales Visit Planning - Create Sales Visit Plan - Assign Sales Executive - Select Visit Date & Time - Customer Name - Contact Person - Contact Number - Visit Address - GPS Location (Latitude/Longitude) - Expected Capacity - Purpose of Visit - Remarks - Visit Status: - Planned - In Progress - Completed - Cancelled 2. Visit Execution - Executive can view assigned visits. - Start and complete visit. - Capture GPS location. - Upload site photos. - Add visit remarks. 3. Expense Management Reuse the existing Expense Management module by introducing a new expense classification: - SALES_SITE_SURVEY Supported Expense Types: - Travel - Fuel - Food - Hotel - Parking - Toll - Local Transport - Customer Meeting - Miscellaneous Each expense should be linked to the corresponding Sales Visit.			

4. Approval Workflow

Existing workflow will be reused:

Sales Executive

→ Sales Manager

→ Finance

→ Payment/Reimbursement

No separate approval process is required.

Database Changes:

Enhance the existing Expense table by adding:

- classification
- visit_id

Acceptance Criteria:

- Manager can create and assign Sales Visits.
- Sales Executive can view assigned visits.
- Sales Executive can complete visits with remarks and photos.
- Expenses can be submitted against a Sales Visit.
- Existing expense approval workflow functions without changes.
- Reports can filter expenses using the SALES_SITE_SURVEY classification.