



**Faculty of Computers
& Artificial Intelligence**



Benha University

Web-Based Assistance CRM system for performance monitoring and improvement

A senior project submitted in partial fulfillment of the requirements for the
degree of Bachelor of Computers and Artificial Intelligence.

Computer Science Department,

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DEDICATION

Family is the great entity that support and assist a successful work. In our ups and downs, our parents have always been there for me. They have shown me how to take responsibility as a person. I wanted to express my love and appreciation to our parents since they have been there for us over these years, helping us and striving to see us succeed. We wouldn't have succeeded without them, so we would like to dedicate this work and success to our parents.

ACKNOWLEDGMENT

After thanking Allah for giving us the will to finish this project, we need to thank the people who were very helpful and never spared information from us. Without the effort and cooperation of our group members, this project would have not been completed. We would like to express our gratitude to our supervisor, Dr. Rasha Orban for her guiding, motivation and support. We also want to thank our teaching assistants Eng. Mohamed Ebrahim for helping us going forward.

DECLARATION

We hereby certify that this material, which we now submit for assessment on the program of study leading to the award of Bachelor of Computers and Artificial Intelligence in (Computer Science) is entirely our own work, that we have exercised reasonable care to ensure that the work is original, and does not to the best of our knowledge breach any law of copyright, and has not been taken from the work of others save and to the extent that such work has been cited and acknowledged within the text of our work.

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ABSTRACT

The CRM system being used integrates with the website to streamline and automate various customer-facing and back-end processes, such as lead generation, sales tracking, and customer service. The CRM's user-friendly interface and customizable dashboards enable website administrators to effectively manage their interactions with clients and customers. The system also provides valuable insights through detailed analytics and reporting, allowing the website to continuously improve its performance and customer satisfaction. Additionally, the integration of the CRM with the website ensures that all customer data is centralized, secure, and easily accessible by authorized personnel. This document provides a step-by-step guide on how to set up and use CRM software to enhance the functionality and efficiency of the website.

The CRM system can also be used to manage the website's marketing efforts, such as email campaigns, social media management, and online advertising. The CRM's marketing automation capabilities make it easy to create and execute targeted campaigns, track their success, and make data-driven decisions to improve future campaigns. This leads to a more personalized customer experience and a higher conversion rate.

Another important feature of the CRM system is its ability to provide excellent customer support. The CRM allows for the creation of a knowledge base, ticketing system, and live chat functionality, making it easy for customers to get the help they need. This can significantly improve customer satisfaction and reduce the workload of the customer support team.

In conclusion, the integration of a CRM system with a website can greatly improve the website's efficiency and effectiveness. From lead generation and sales tracking, to marketing and customer support, the CRM software offers a comprehensive solution that can help to grow a website's business and increase customer satisfaction.

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LIST OF ACRONYMS/ABBREVIATIONS

CRM	Customer Relationship Management
ML	Machine Learning
NLP	Natural language processing
DA	Data Analysis

Chapter One

1 INTRODUCTION

1.1 Introduction

In today's global trading environment, from the traditional way of selling products or services, to auctioning anything on-line, companies big or small typically have customers or partners from all over the world. Companies need to keep track of their customers, interact with them, prospect potential customers, and try to forecast what their customers will be buying in the future. We describe here some aspects of recording information about customers for an organization in a trading community that sells products or services to its customers, which can be other organizations or individuals (parties).

1.2 Background

Recently, online shopping has become very common in many areas, especially online shopping for clothes and shoes, but some problems have arisen in terms of customer satisfaction due to the customer's inability to fully interact and communicate with employees within the organization. Therefore, we have the idea of a site whose goals are to provide full communication between Customer and employees within the organization through CRM and ML, NLP.

Customer relationship management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.

One important aspect of the CRM approach is the systems of CRM that compile data from a range of different communication channels, including a company's website, telephone, email, live chat, marketing materials and more recently, social media.

The use of Customer Relationship Management (CRM) software has become increasingly popular in recent years as a means to improve the management of customer interactions and data. The software helps businesses to centralize customer information, automate various processes, and gain valuable insights through analytics and reporting.

The integration of a CRM system with a website can provide numerous benefits, including streamlined lead generation, improved sales tracking, enhanced marketing efforts, and excellent customer support. The ability to personalize the customer experience and make data-driven decisions also leads to increased customer satisfaction and a higher conversion rate. As businesses increasingly move their operations online, the integration of a CRM with a website has become a critical tool for success.

Through the CRM approach and the systems used to facilitate it, businesses learn more about their target audiences and how to best cater to their needs.

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving customer service relationships and assisting in customer retention and driving sales growth. CRM systems compile customer data across different channels, or points of contact between the customer and the company, which could include the company's website, telephone, live chat, direct mail, marketing materials and social media. CRM systems can also give customer-facing staff detailed information on customers' personal information, purchase history, buying preferences and concerns.

1.3 Problem definition

Users who want to shop online, there are some problems such as communication and interaction between them and the employees who work within the organization...

So we ask some questions about how to solve these problems?

- How to communicate and interact with the clients?
- How about collecting information about the customer?
- How to improve the performance of employees within the organization?

One of the biggest problems facing businesses today is the fragmentation of customer data across multiple systems and platforms. This makes it difficult to get a complete picture of the customer journey, leading to a disconnect between different departments and a lack of consistent customer experience.

Another problem is the manual nature of many customer-facing processes, such as lead generation, sales tracking, and customer support. This can be time-consuming and error-prone, leading to inefficiencies and decreased productivity.

In addition, businesses often struggle to effectively track the success of their marketing efforts and make data-driven decisions. This can result in poorly executed campaigns and a lack of ROI.

Finally, many businesses struggle to provide excellent customer support, leading to frustrated customers and a negative impact on customer satisfaction. This can result in decreased customer loyalty and a decline in revenue.

These problems highlight the need for a comprehensive solution that can centralize customer data, automate processes, provide valuable insights, and improve the customer experience. This is where the integration of a CRM system with a website can help.

1.4 Project objective

The objective of this project is to improve the efficiency and effectiveness of a website by integrating it with a Customer Relationship Management (CRM) system. The following are the specific objectives of the project:

- **Centralize customer data:** To bring all customer data into one centralized system, making it easily accessible and secure.
- **Streamline processes:** To automate various customer-facing and back-end processes, such as lead generation, sales tracking, and customer support, to increase productivity and reduce errors.
- **Enhance marketing efforts:** To improve the success of marketing campaigns by providing the ability to create and execute targeted campaigns and track their success.
- **Improve customer experience:** To provide a personalized customer experience through the use of marketing automation, knowledge base, ticketing system, and live chat functionality.
- **Provide valuable insights:** To gain valuable insights through detailed analytics and reporting, allowing the website to continuously improve its performance and customer satisfaction.
- **Increase conversion rate:** To increase the conversion rate by providing a seamless customer journey and making data-driven decisions.

Overall, the project aims to create a comprehensive solution that will help the website to grow its business, improve customer satisfaction, and increase revenue.

1.5 Stakeholders

The stakeholders in a project to integrate a website with a Customer Relationship Management (CRM) system can vary depending on the specific implementation, but the following are common stakeholders:

1. **Website administrators:** They are responsible for managing the website and ensuring that it functions effectively and efficiently.
2. **Marketing team:** They are responsible for creating and executing marketing campaigns and ensuring that they are effective in driving conversions.
3. **Sales team:** They are responsible for generating leads and tracking sales, and they need access to customer data to do their job effectively.
4. **Customer support team:** They are responsible for providing excellent customer support and ensuring that customer inquiries are resolved in a timely manner.
5. **IT department:** They are responsible for the technical implementation of the CRM system and ensuring that it integrates seamlessly with the website.
6. **Management:** They are responsible for making decisions about the direction of the company and ensuring that the project aligns with overall business objectives.
7. **Customers:** They are the end-users of the website and the ultimate beneficiaries of the improved customer experience that the CRM system provides.

Each stakeholder has different requirements and expectations from the project, and it is important to involve them in the planning and implementation process to ensure their needs are met and the project is successful.

1.6 Target users

The target users of a Customer Relationship Management (CRM) system integrated with a website can vary depending on the specific implementation, but the following are common target users:

1. Website visitors: They are the potential customers who visit the website and interact with it in various ways, such as filling out a contact form, making a purchase, or seeking support.
2. Marketing team: They are responsible for creating and executing marketing campaigns and need access to customer data and marketing automation tools to do their job effectively.
3. Sales team: They are responsible for generating leads and tracking sales and need access to customer data and sales tracking tools to do their job effectively.
4. Customer support team: They are responsible for providing excellent customer support and need access to customer data and support tools, such as a knowledge base, ticketing system, and live chat functionality, to do their job effectively.
5. Website administrators: They are responsible for managing the website and need access to customer data and website analytics to do their job effectively.

Each target user has different needs and requirements from the CRM system, and it is important to ensure that the system is designed to meet their specific needs and provide a positive user experience. By targeting the specific needs of these user groups, the CRM system can help the website to better serve its customers and grow its business.

Chapter Two

2 SYSTEM ANALYSIS AND DESIGN

2.1 DATA GATHERING

Data gathering is an important aspect of a project to integrate a Customer Relationship Management (CRM) system with a website. The following are the steps involved in the data-gathering process:

1. **Identify the data sources:** The first step is to identify all the relevant data sources, such as the website, existing customer databases, marketing and sales tools, and any other relevant systems.
2. **Define the data requirements:** The next step is to define the data requirements for the CRM system, including the specific data fields that are required, the data format, and the level of data quality that is needed.
3. **Collect the data:** The next step is to collect the data from various sources, which may involve extracting data from existing systems, manually entering data, or importing data from external sources.
4. **Clean and standardize the data:** Once the data has been collected, it is important to clean and standardize it to ensure that it is accurate and consistent. This may involve removing duplicates, correcting errors, and transforming data into a common format.
5. **Verify the data:** The final step is to verify the data to ensure that it is accurate and complete. This may involve checking a sample of the data to ensure that it meets the data requirements, or conducting a full data verification process.

Additionally, it is important to consider data privacy and security when gathering data for the CRM system. The following are some best practices for data privacy and security:

6. **Obtain consent:** Before collecting any personal data, it is important to obtain consent from the individuals concerned, in accordance with relevant privacy laws and regulations.
7. **Protect the data:** The collected data should be stored securely, using encryption and other security measures to prevent unauthorized access or theft.
8. **Regularly monitor the data:** Regular monitoring of the data is important to detect and prevent any unauthorized access or other security incidents.
9. **Provide access controls:** Access to the data should be restricted to authorized personnel only, using role-based access controls to ensure that only those who need access to the data have it.
10. **Regularly review the data:** Regular reviews of the data should be conducted to ensure that it is accurate, complete, and up-to-date, and that it is being used in accordance with relevant privacy laws and regulations.

It is important to have a robust data gathering process to ensure that the CRM system has access to accurate and complete data, which is necessary to deliver the desired benefits and achieve the project objectives.

2.2 USE CASE DIAGRAM

A use case is a software and system engineering term that describes how a user uses a system to accomplish a particular goal. It acts as a software modelling technique that defines the features to be implemented and the resolution of any errors that may be encountered

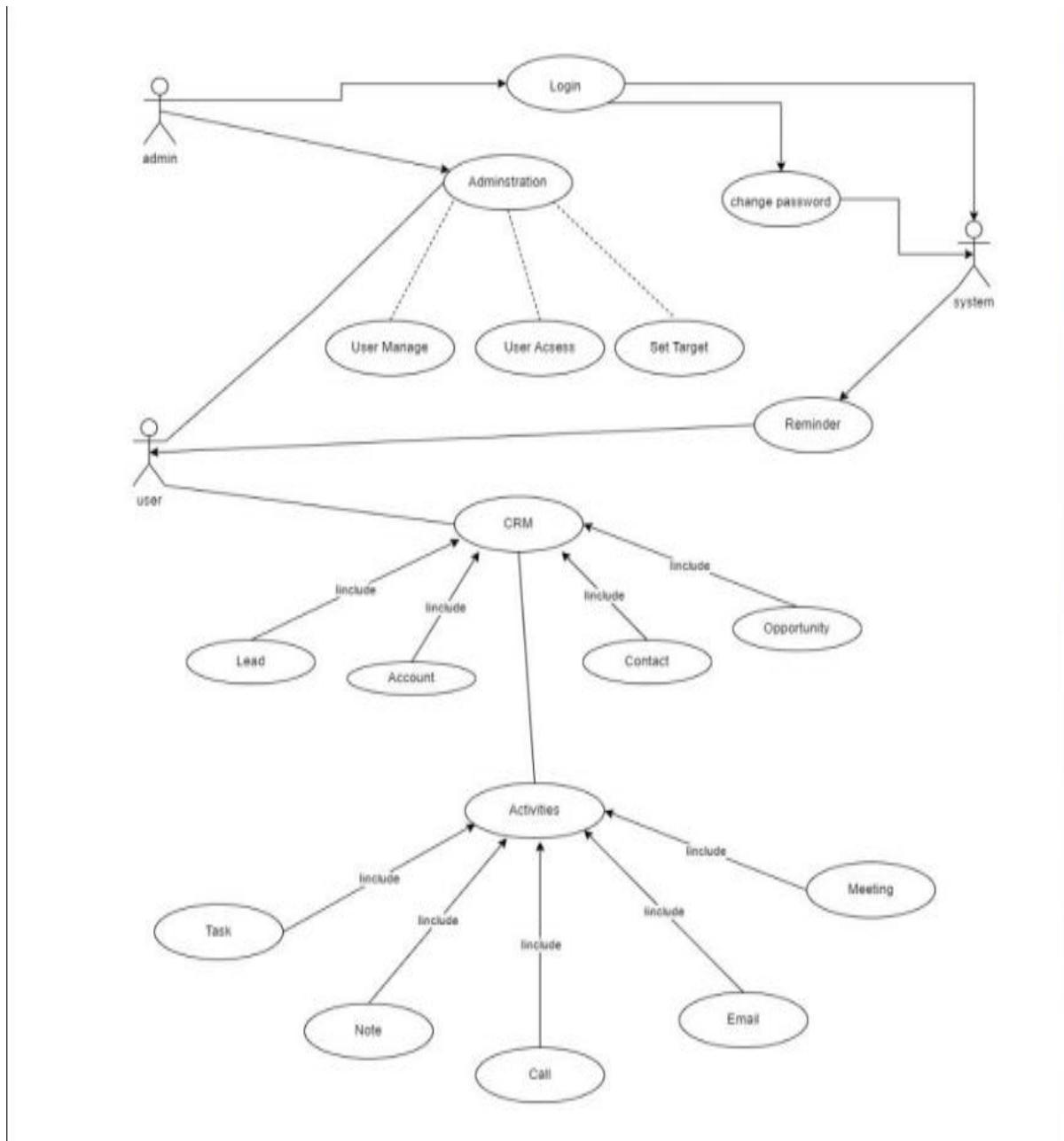


Figure 1-1: Use Case Diagram

Usecase name :	Change password
Actor:	Admin , CRM User
Pre-condition:	Login
Primary path:	1-Enter old password 2-Enter New password 3-Confirm New password 4-Click "change password" Butten
Exceptional Path:	3.1 Please enter the same value 4.1 Your password is correct

Usecase name :	account
Actor:	CRM User
Pre-condition:	Login
Primary path:	1-Enter account information 2-Select account catagory 3-Click "OK" Button to search 4-Select Number list 5- Click "Edit" Icon to Update account 6- Click "Delete" Icon to Delete account 7- Click "ADDNew" Icon to Create anew account

Figure 1-2: Use Case Table

2.3 CLASS DIAGRAM

Shows static structure of classifiers in a system. Diagram provides basic notation for other structure diagrams prescribed by UML. Helpful for developers and other team members too. Business Analysts can use class diagrams to model systems from business perspective.

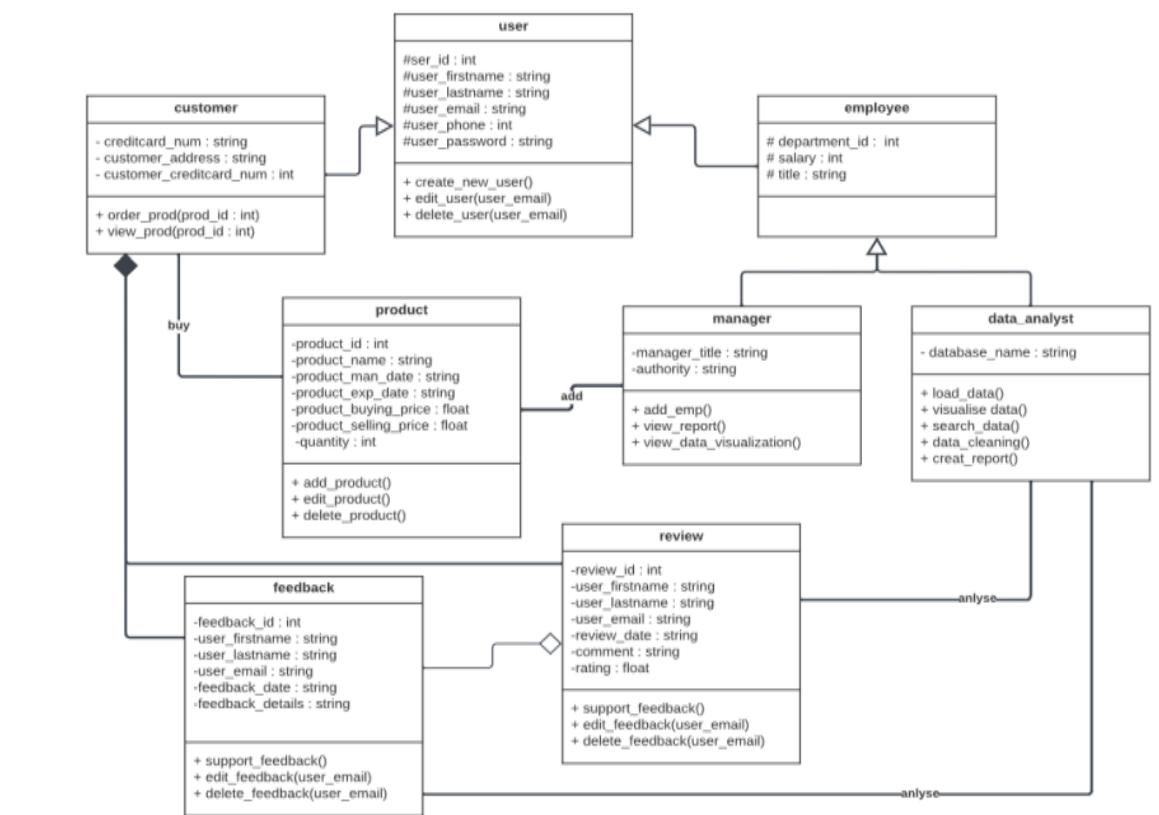


Figure 1-3: Class diagram

2.4 AN ENTITY RELATIONSHIP DIAGRAM(ERD)

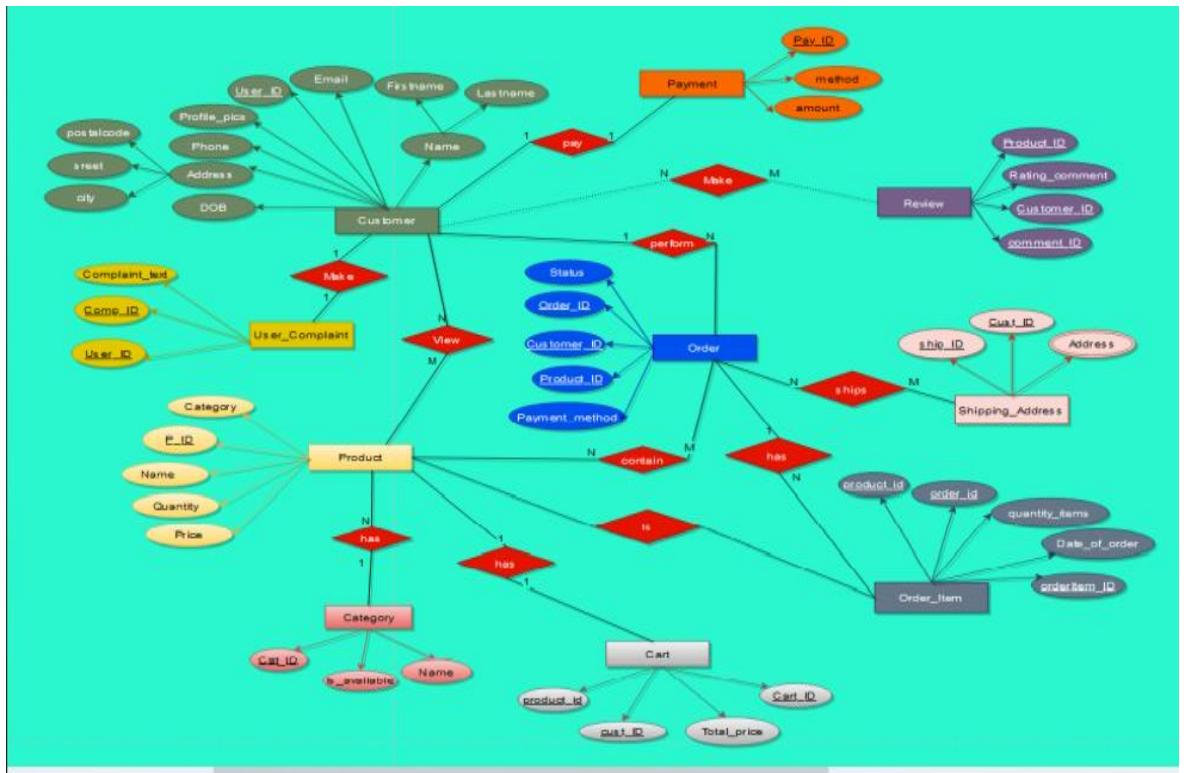


Figure 1-4: ERD for E-shopping

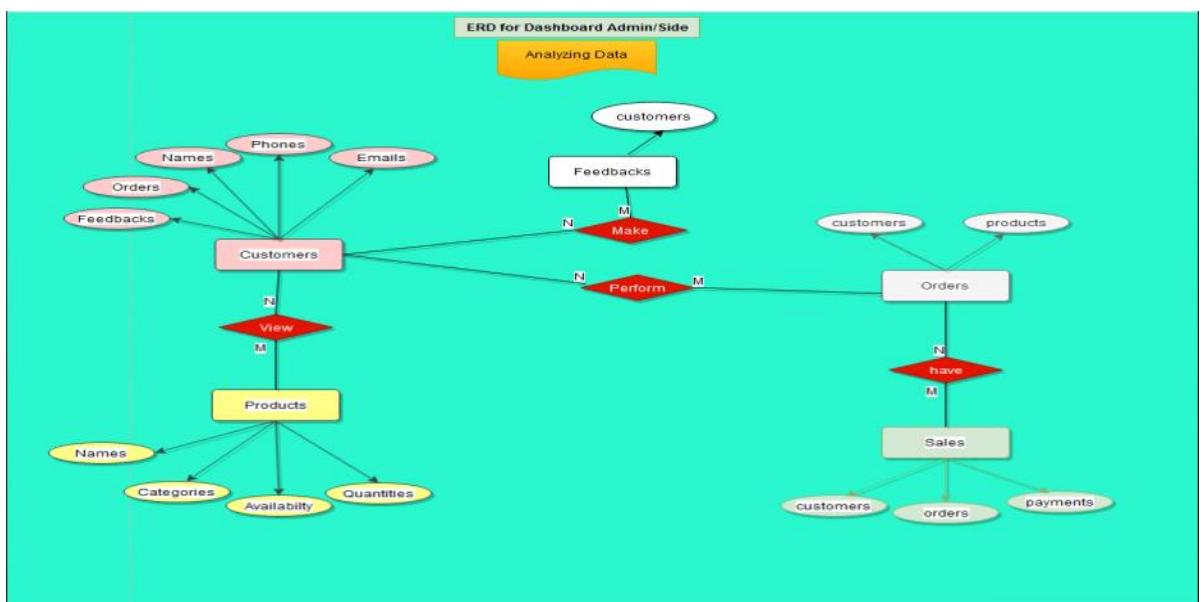


Figure 1-5 Erd for analyzing data

2.5 DATA-FLOW DIAGRAM

2.5.1 CONTEXT DIAGRAM

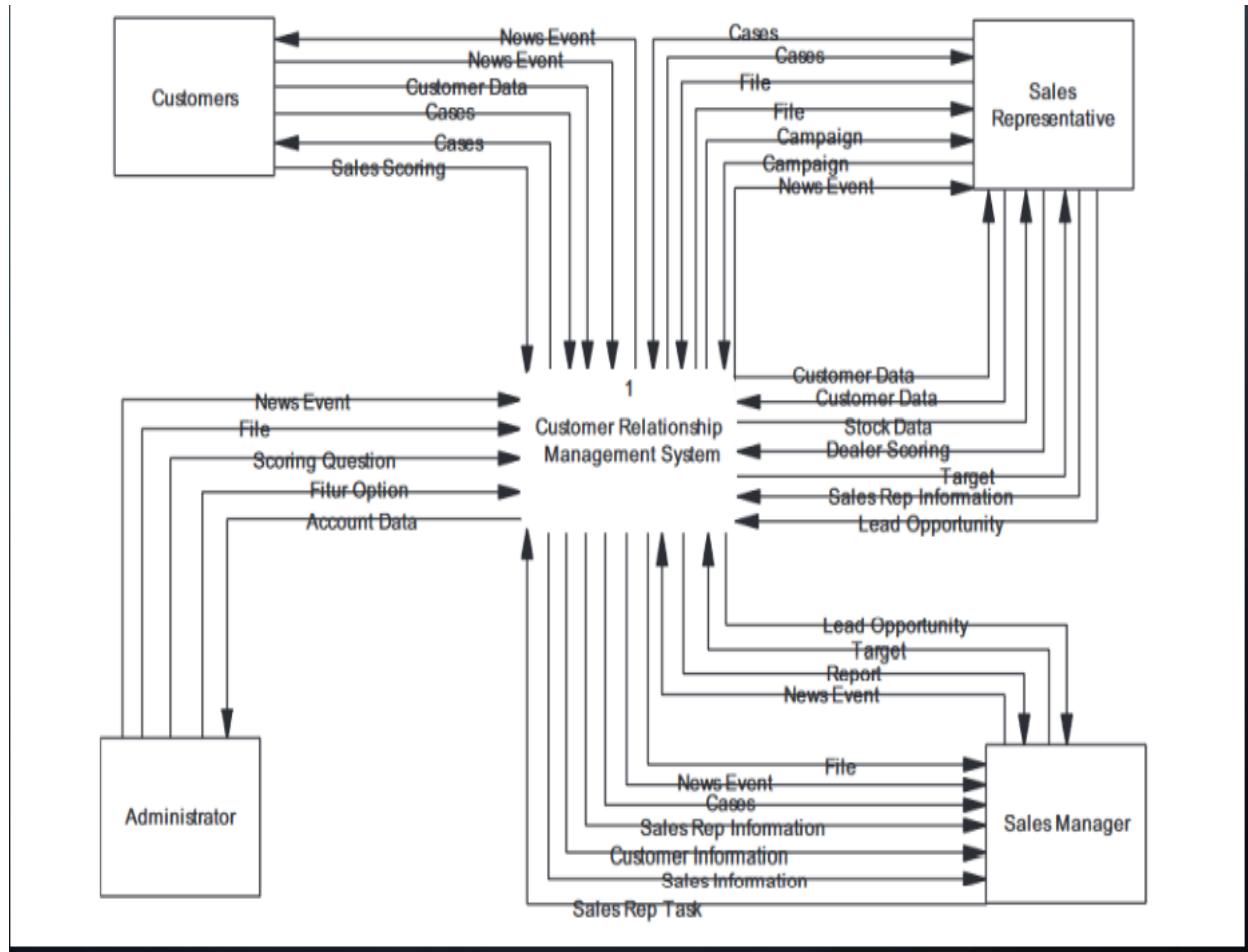


Figure 6 context diagram

2.5.2 DFD level 1

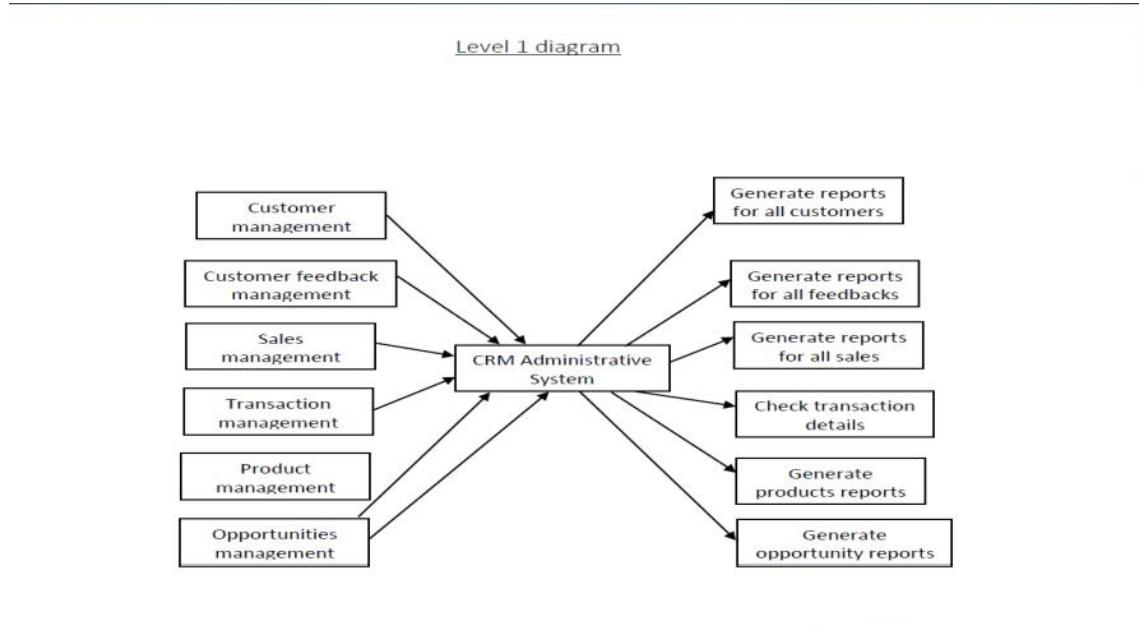


Figure 7 dfd 1

2.5.3 DFD level 2

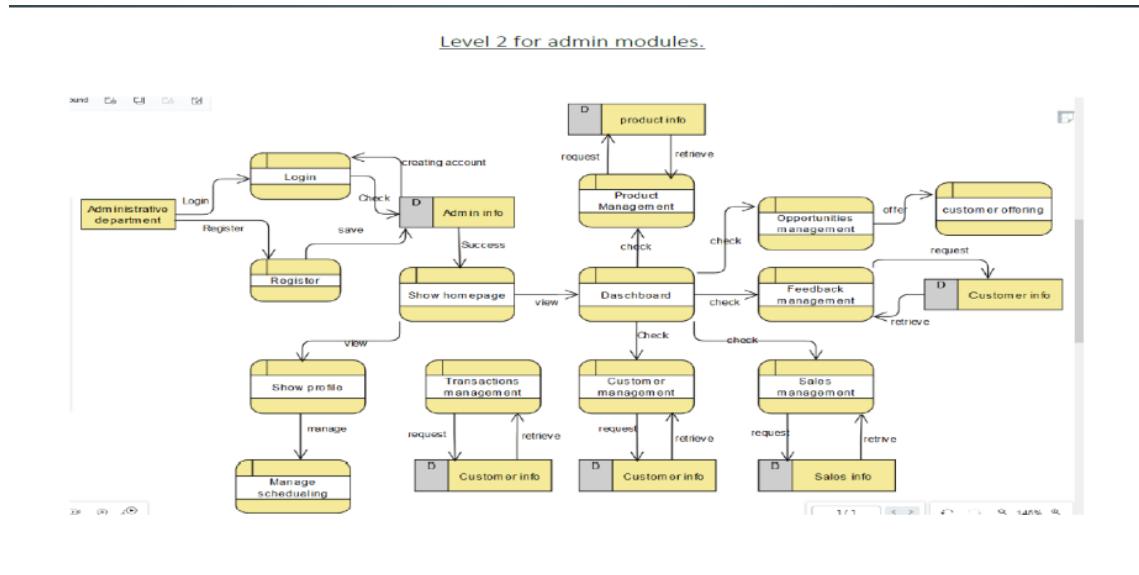


Figure 8 DFD2

2.6 ACTIVITY DIAGRAM

Activity Diagram

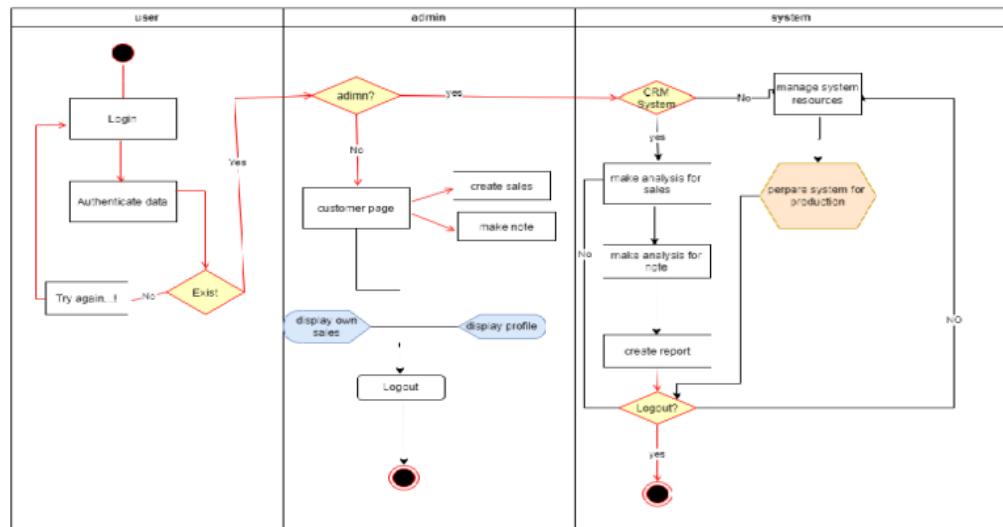


Figure 9 Activity Diagram

2.7 SEQUENCE DIAGRAM

2.7.1 Sequence diagram for customer

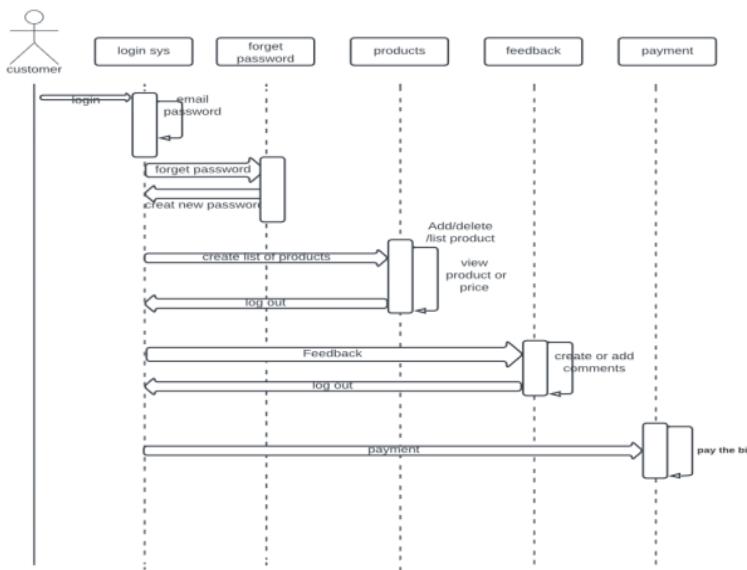


Figure 10 Sequence diagram

2.7.2 Sequence diagram for admin

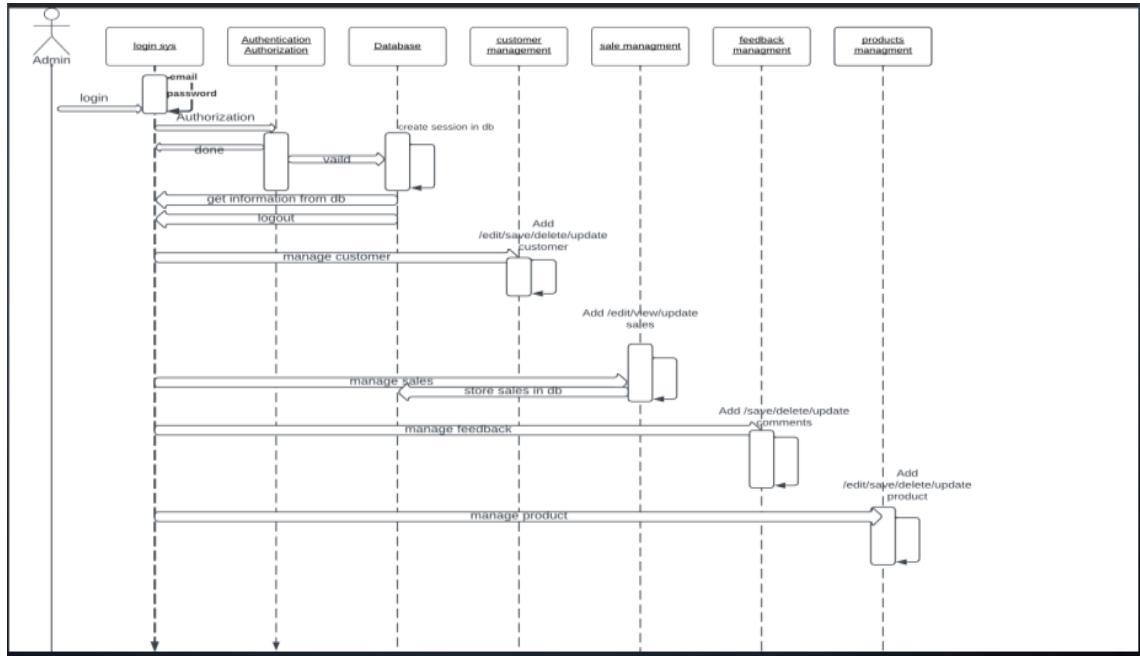


Figure 11 Sequence diagram for admin

2.7.3 Sequence diagram for analyst

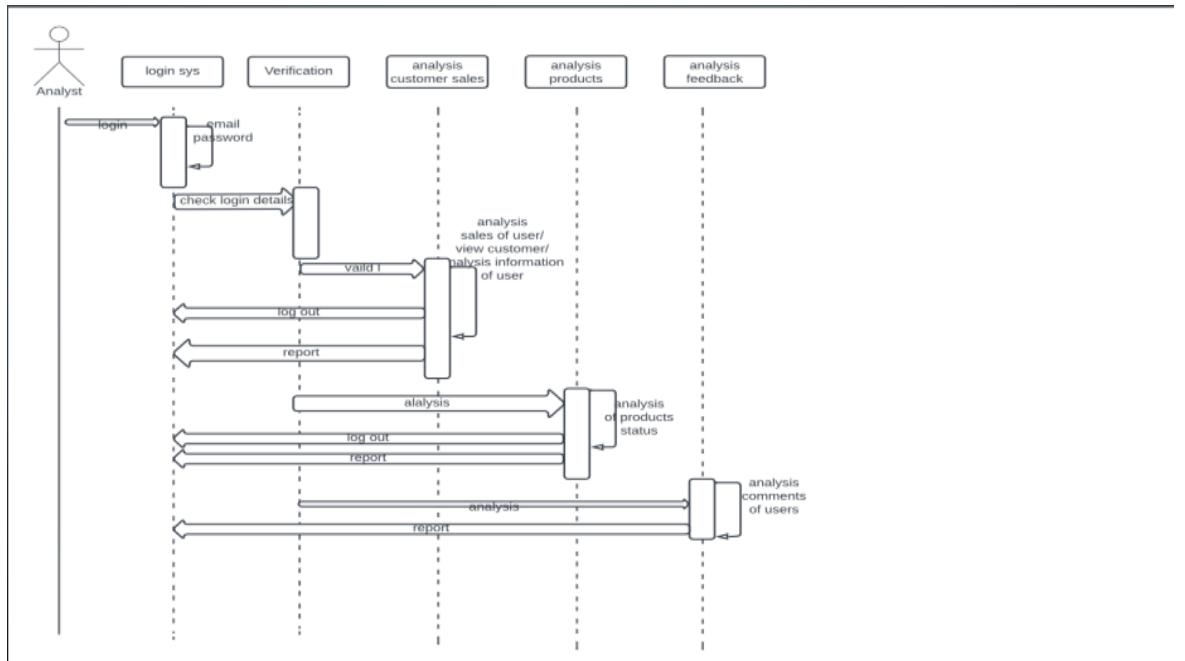


Figure 12 Sequence diagram for analyst

2.8 COMPONENT DIAGRAM

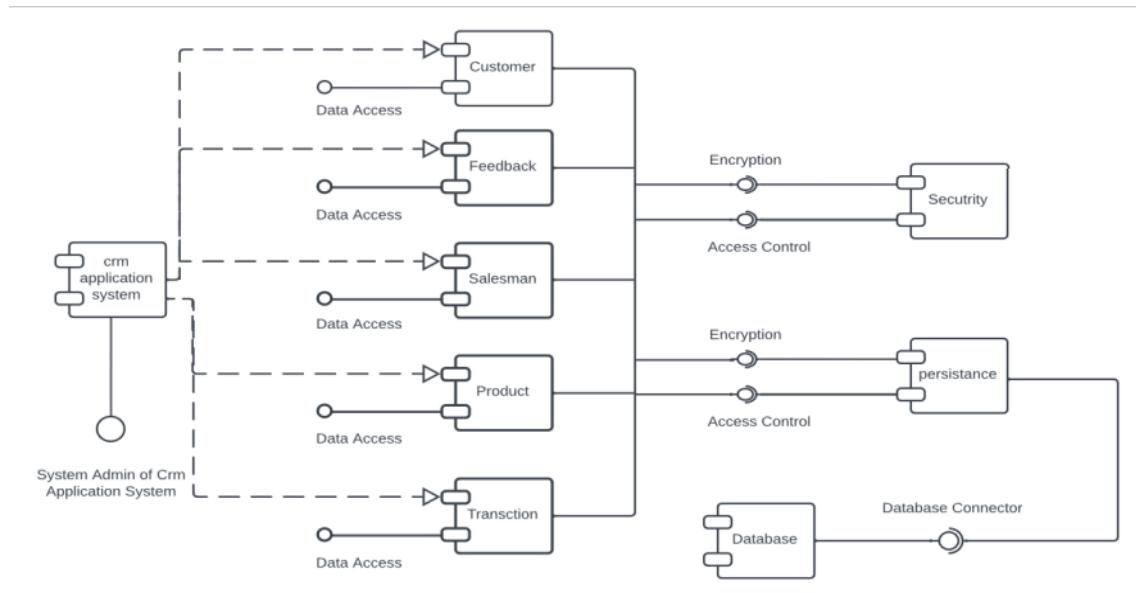


Figure 13 Component diagram

2.9 PACKAGE DIAGRAM

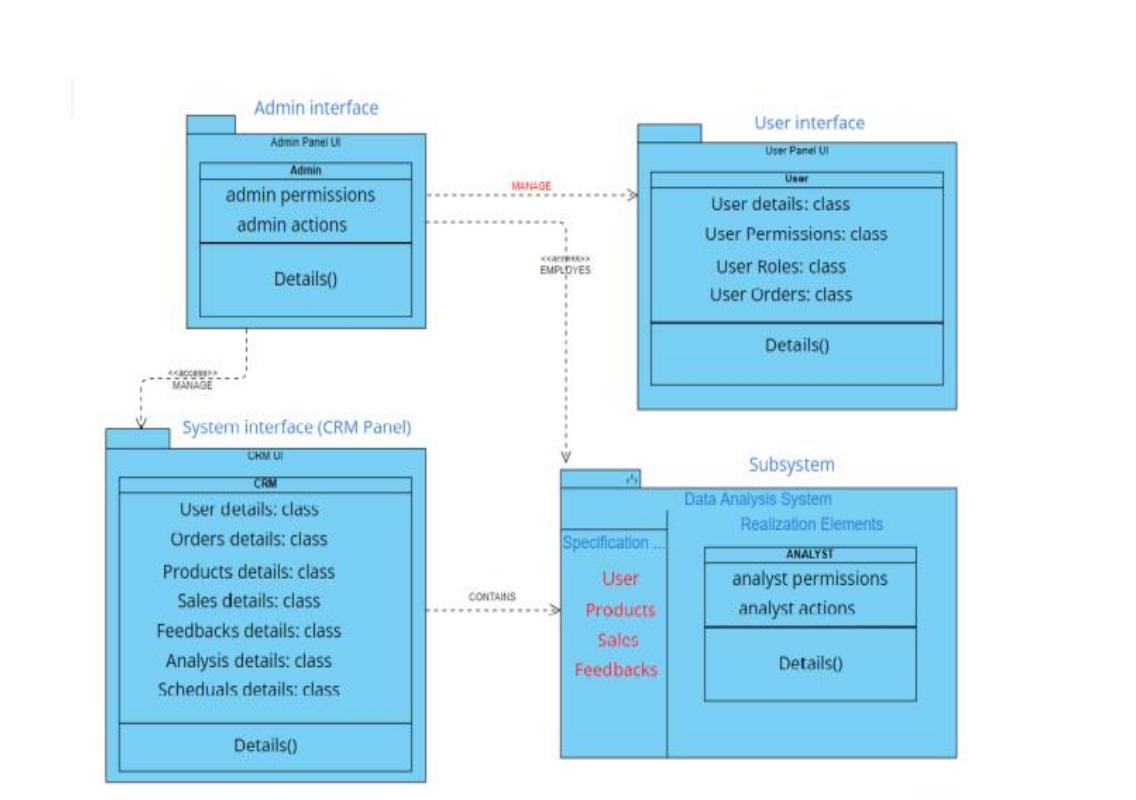


Figure 14 Package diagram

2.10 ARROW DIAGRAM

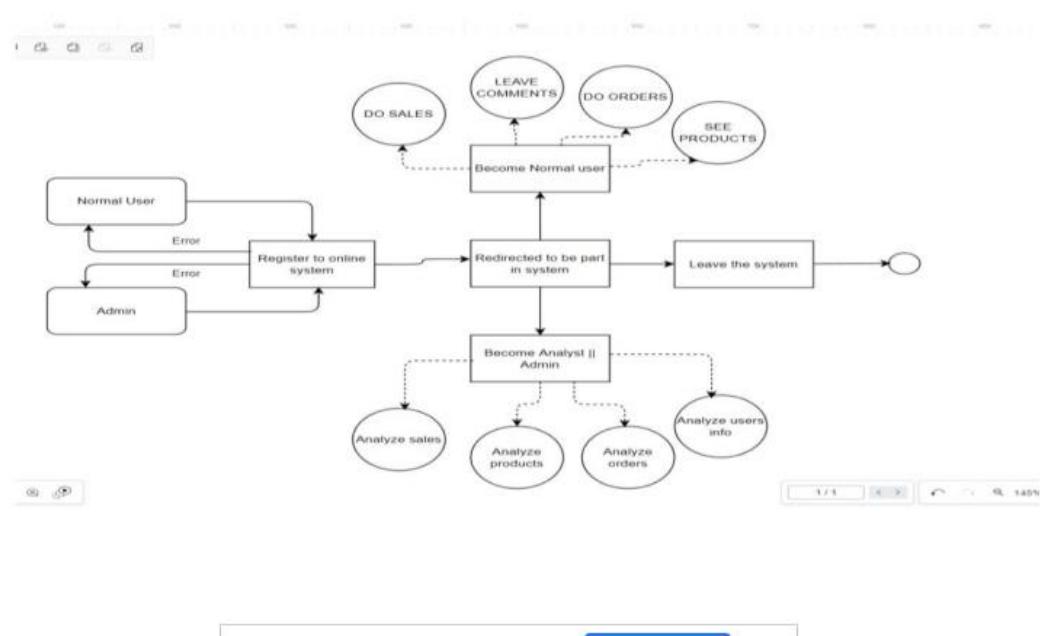


Figure 15 Arrow diagram

2.11 CONSTRAINTS BLOCK DIAGRAM FOR ADMIN FUNCTIONALITIES.

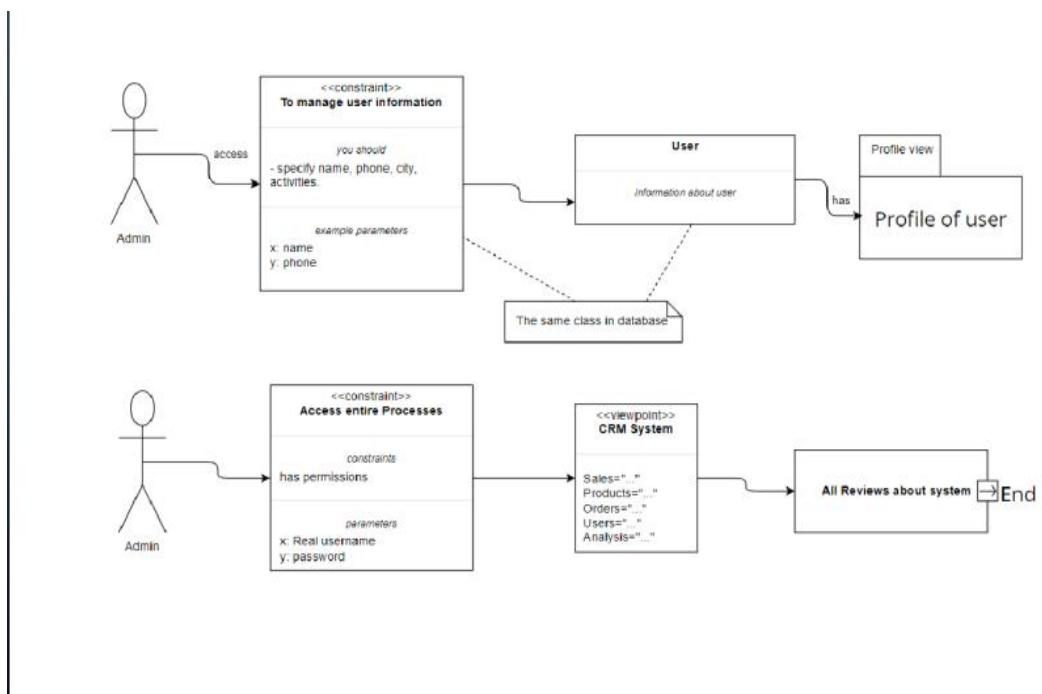


Figure 16 Constraints Block Diagram for Admin

2.12 COMMUNICATION DIAGRAM

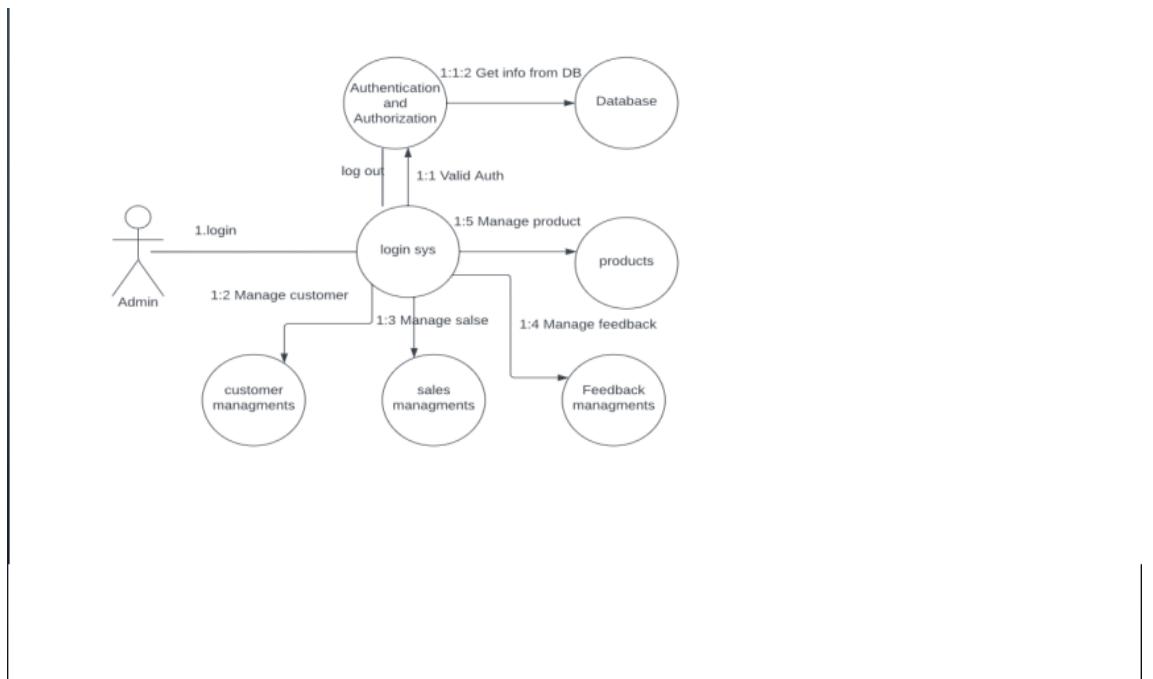


Figure 17 Communication diagram

2.13 FLOW-CHART DIAGRAM

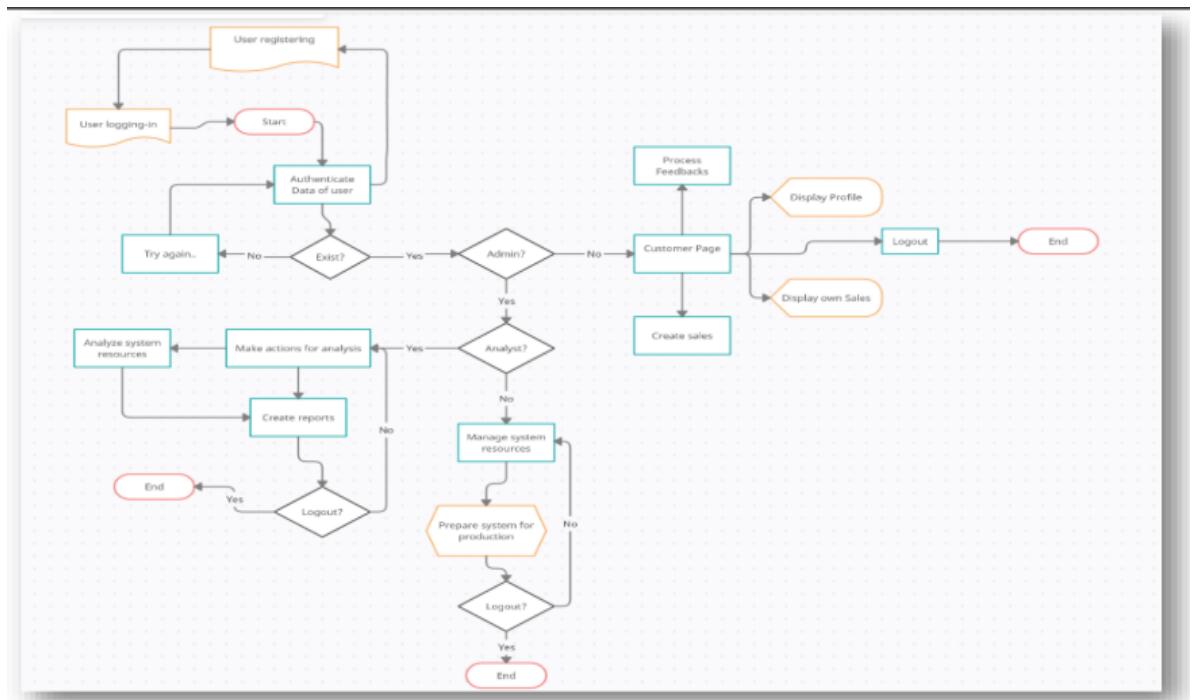


Figure 18 Flow-chart diagram

2.14 STATE-MACHINE DIAGRAM

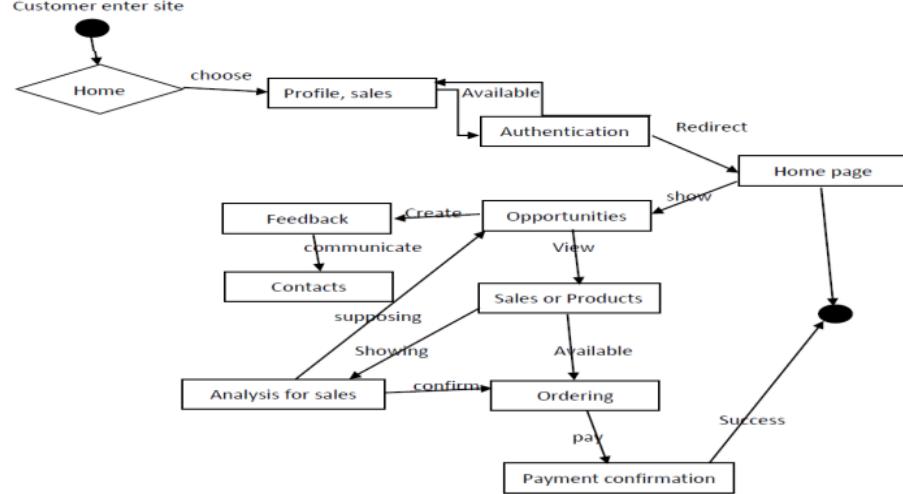


Figure 19 STATE-MACHINE DIAGRAM

2.15 TIMING DIAGRAM

Timing diagram.

Advantage?

- 1- Timing diagrams keep track of every change that occurs in the system.
- 2- It explains the time processing of an object in detail.
- 3- The diagram easily explains the graphical representation of a lifeline state.
- 4- It describes the modification object bears in its form over the lifeline.

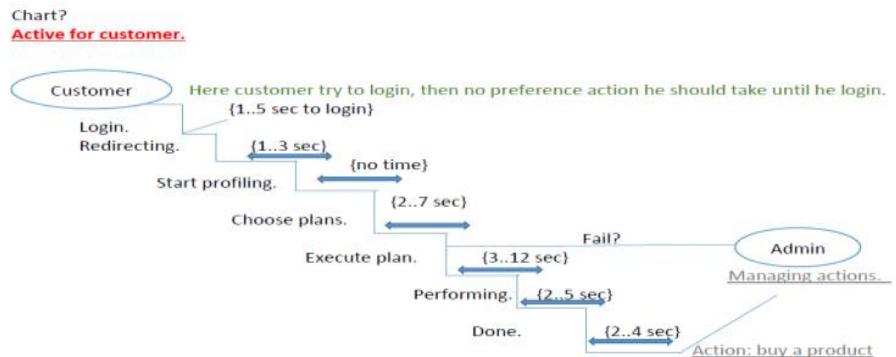


Figure 20 Timing diagram

2.16 RELATIONAL DATA MODELS

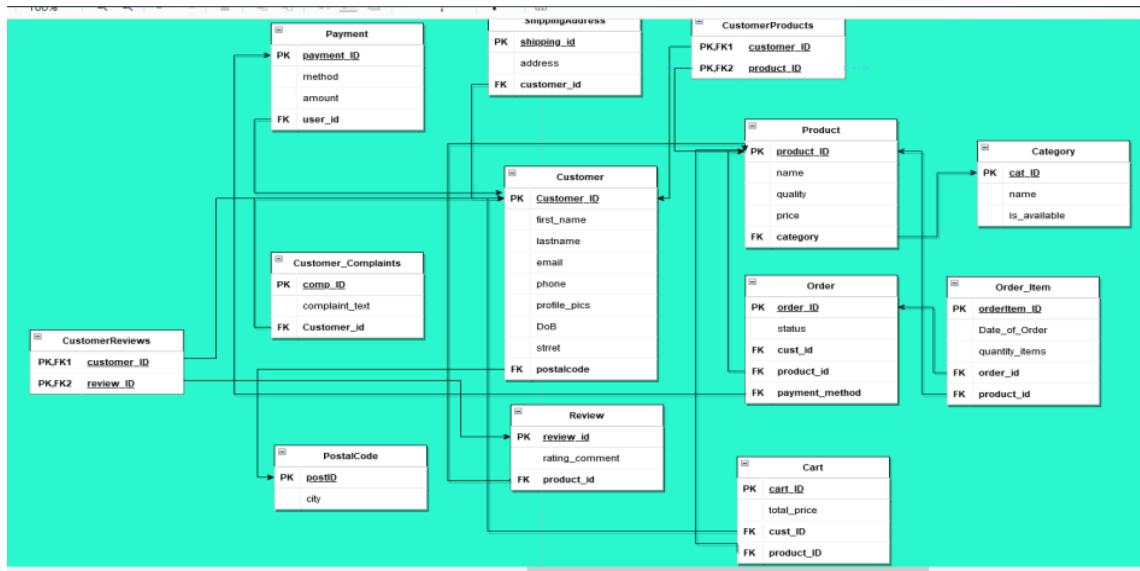


Figure 21 Relational Data Models

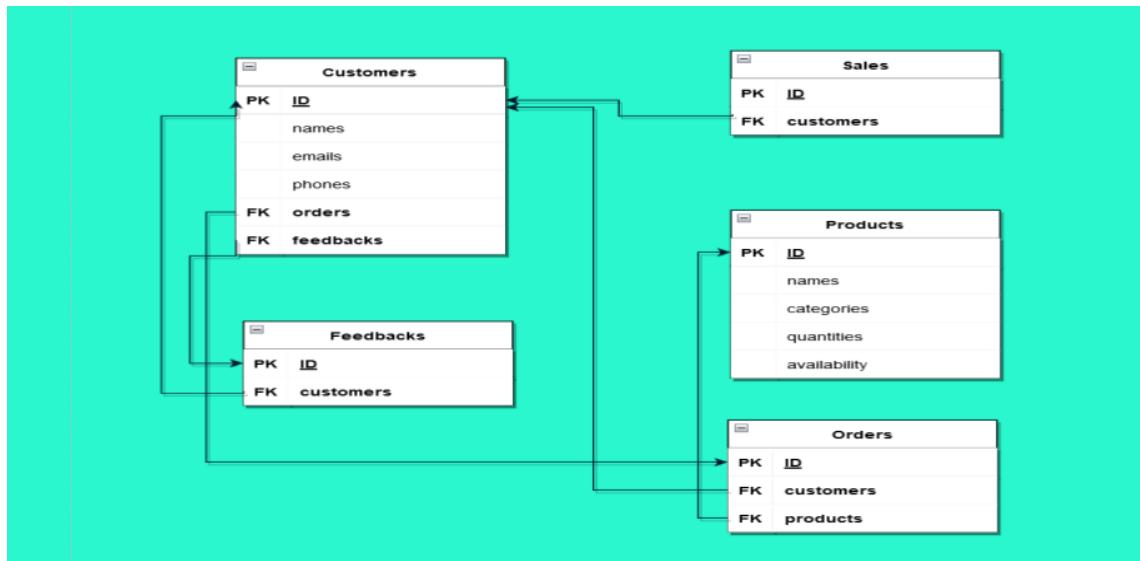
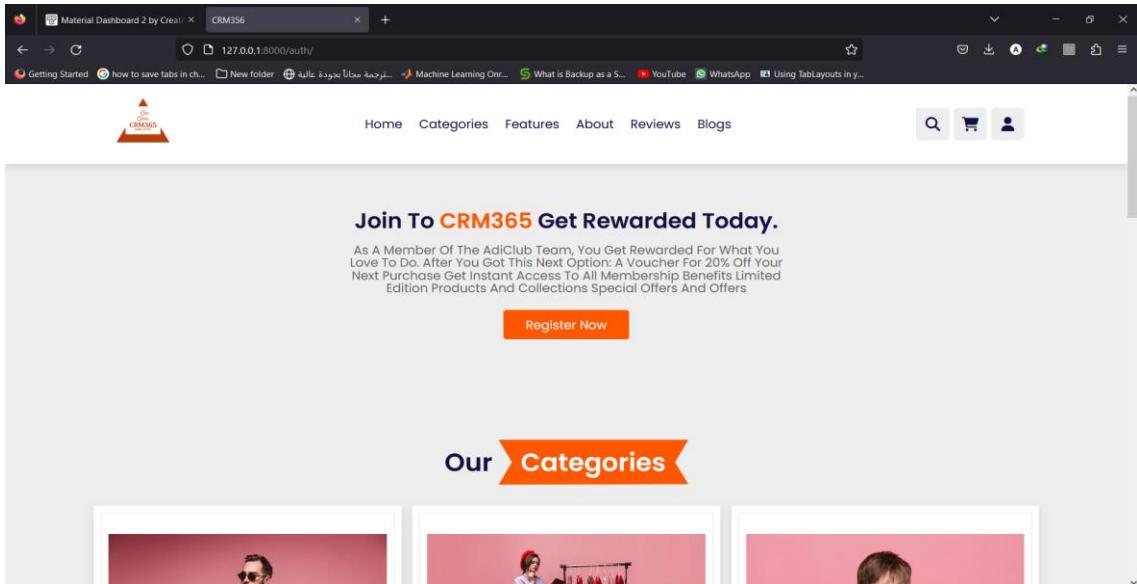


Figure 22 Relational (cont...)

Chapter Three

Here are the pages of The **Dashboard** and The Website 'E-Commerce':

1- Landing page

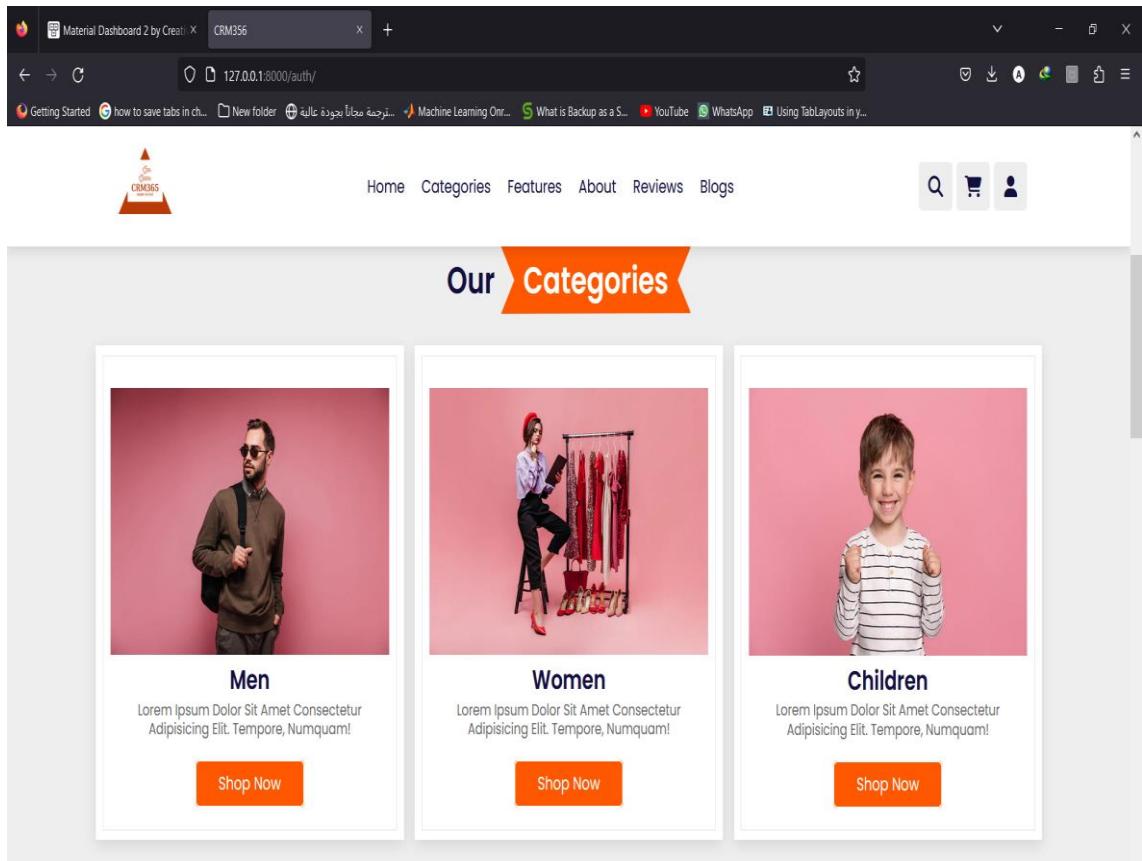


A landing page for a clothing brand's CRM website should include the following elements to effectively engage with visitors and encourage them to take action:

A clear and concise headline: The headline should grab the attention of the visitors and convey the main message of the brand. A hero image: A hero image is a large, prominent image that serves as the background of the landing page. It should showcase the clothing brand's products in an attractive and appealing manner. Product descriptions and features: Visitors should be able to easily understand what the brand is offering and what makes their products unique. Customer reviews and testimonials: Social proof is a powerful tool in convincing visitors to take action. Displaying customer reviews and testimonials can help build trust and credibility with visitors. A clear call to action (CTA): The CTA should be prominent and clearly state what action visitors should take, such as signing up for a newsletter or making a purchase. Contact information: Visitors should be able to easily find the brand's contact information, including an email address and phone number.

A responsive design: The landing page should be optimized for viewing on different devices, including desktop computers, tablets, and smartphones. Simple and intuitive navigation: The landing page should have a clear and simple navigation structure that makes it easy for visitors to find what they are looking for. Including these elements on a landing page for a clothing brand's CRM website can help to effectively engage with visitors and encourage them to take action, ultimately driving sales and improving customer satisfaction.

2- Our Categories



Sure, categories are an important element to include on a clothing brand's CRM website landing page. Some common categories for a clothing brand may include:

- 3- Men's clothing
- 4- Women's clothing
- 5- Children's clothing

6- Accessories

7- Footwear

8- Outerwear

9- Swimwear

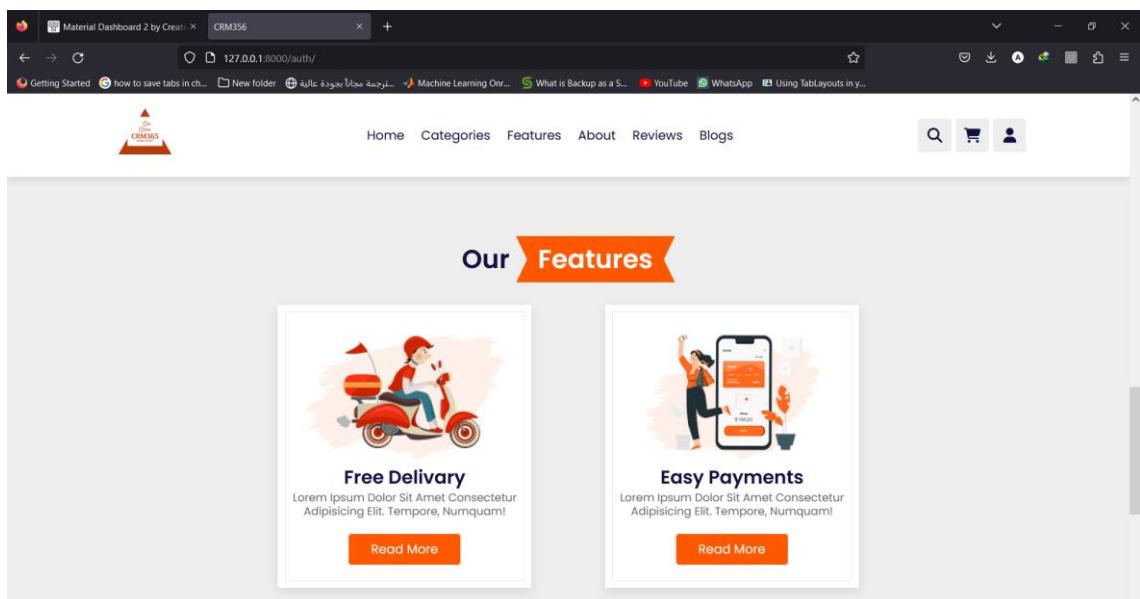
10- Active wear

11- Denim

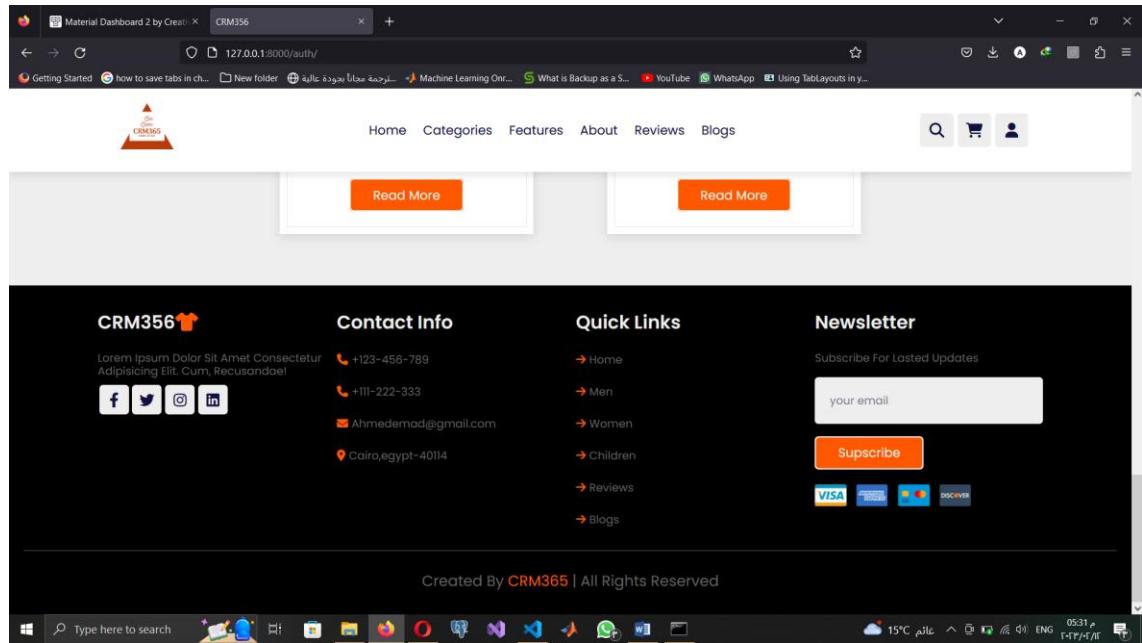
12- Sale items

Having clear and well-defined categories helps visitors to easily find what they are looking for and navigate the website, making their shopping experience more enjoyable and efficient. Additionally, it also helps the brand to better organize and showcase their products.

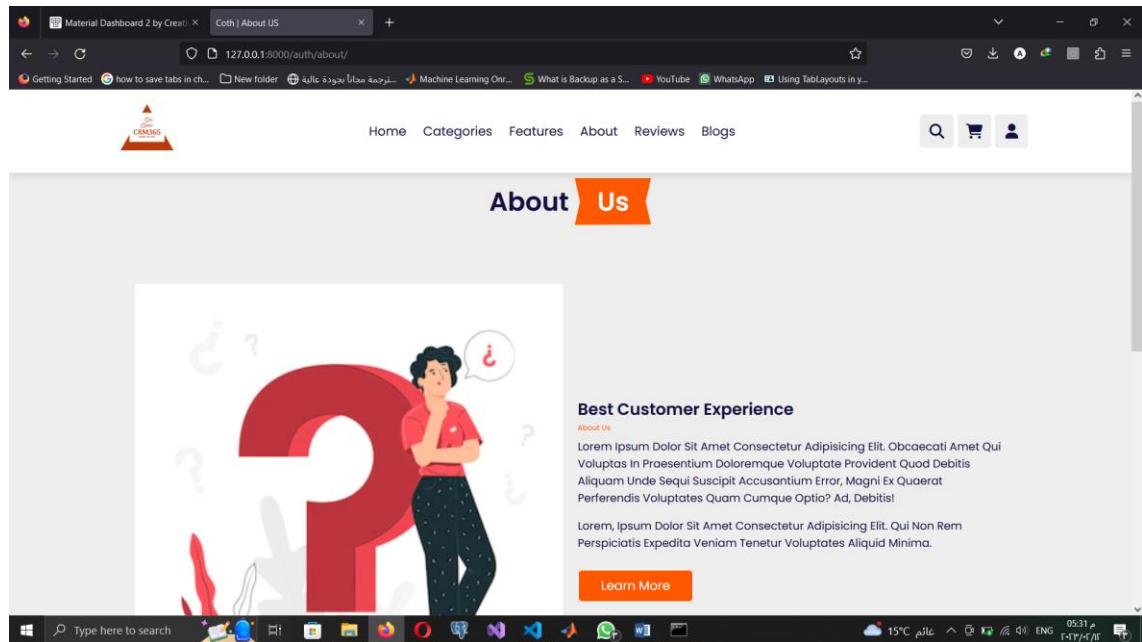
3- Features



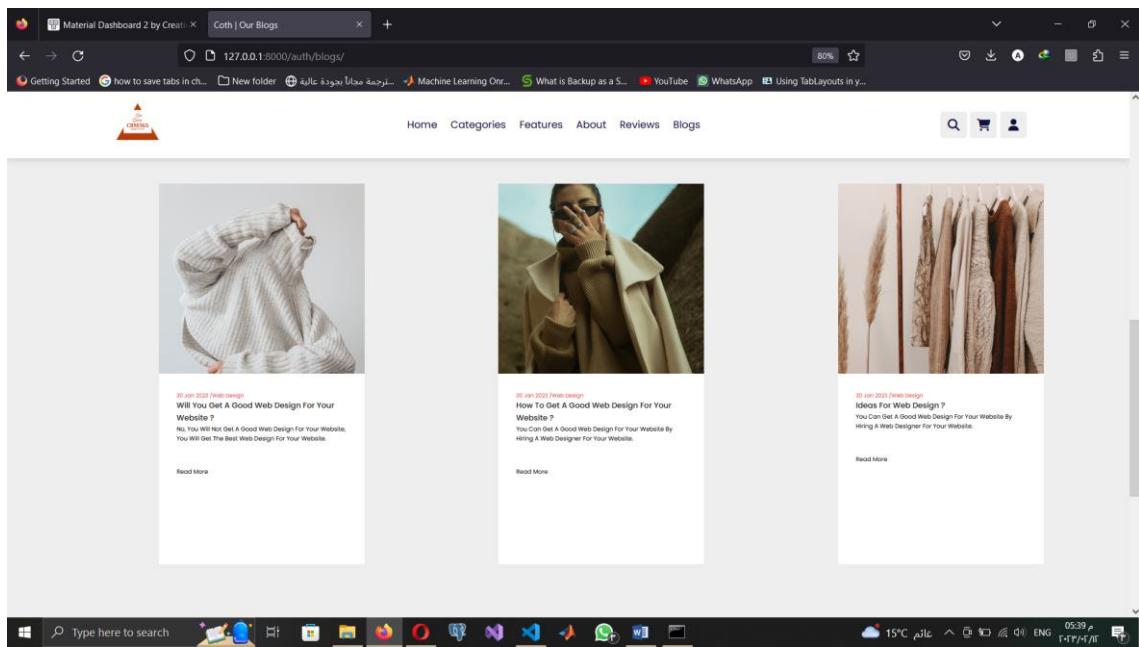
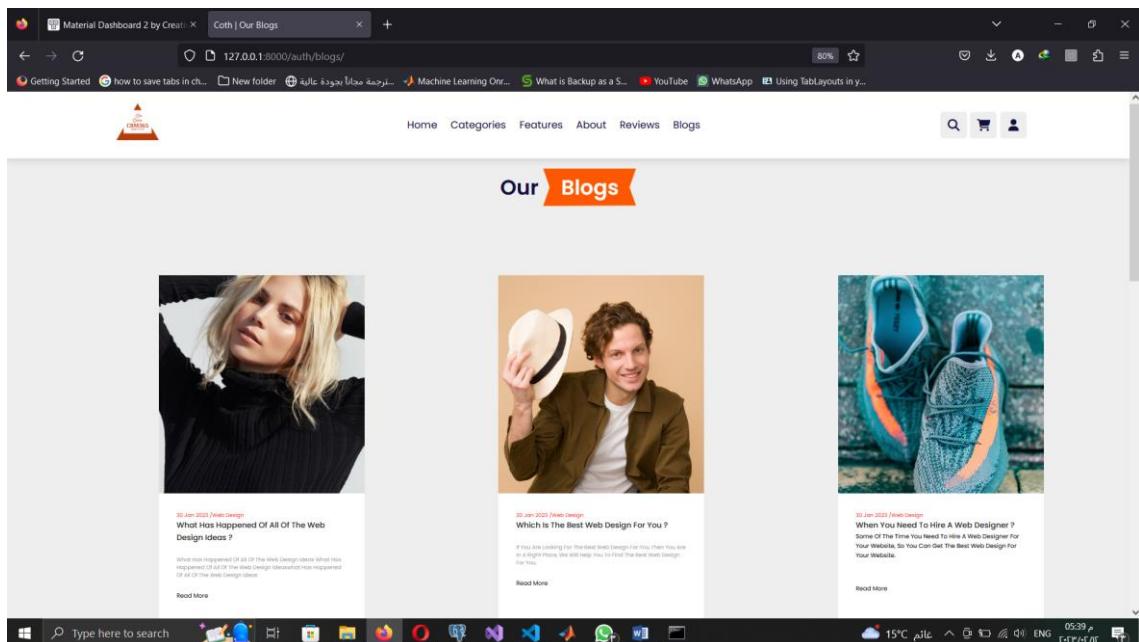
4- The footer



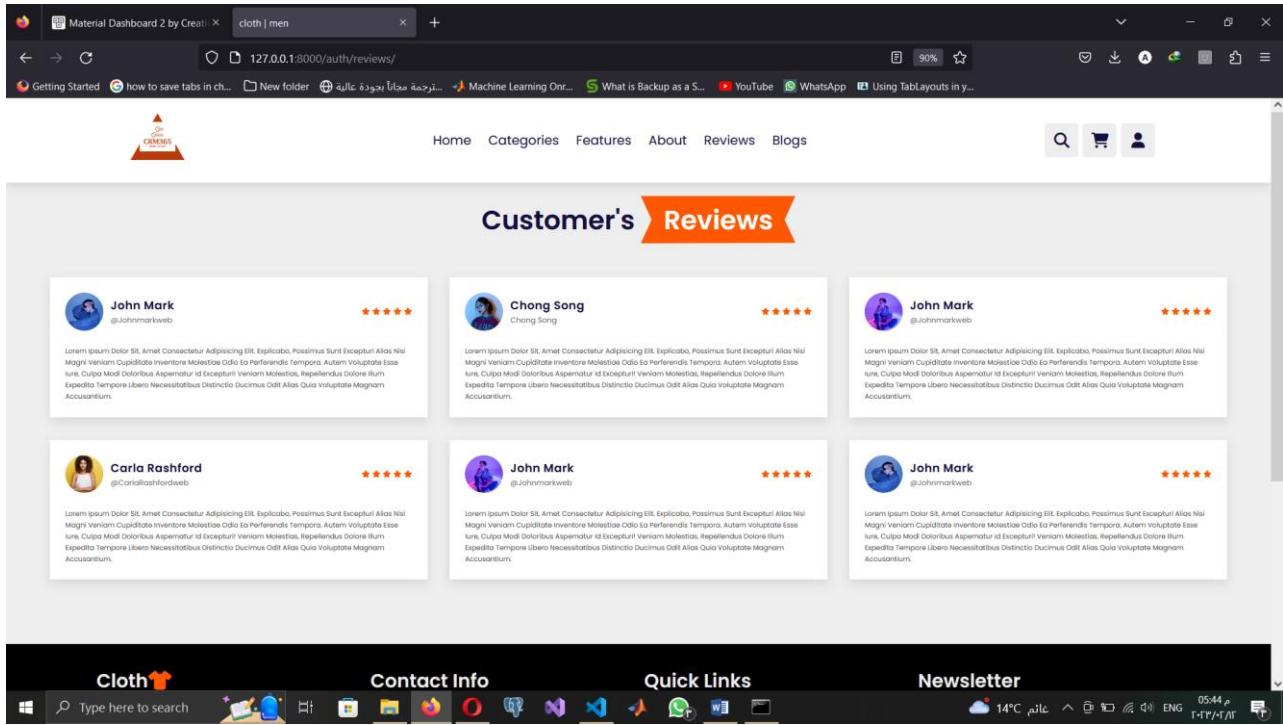
5- About us page



6- The blogs of customers



The reviews



The screenshot shows a web browser displaying a page titled "Customer's Reviews". The page features a header with a logo and navigation links for Home, Categories, Features, About, Reviews, and Blogs. Below the header, the title "Customer's Reviews" is prominently displayed. The main content area contains five review cards, each with a user profile picture, name, rating (5 stars), and a short description. The reviews are repeated twice, showing five reviews in total. At the bottom of the page, there is a navigation bar with links for Contact Info, Quick Links, and Newsletter, along with system status indicators like weather, time, and battery level.

Customer's Reviews

John Mark    @Johnmarkweb

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Chong Song    @ChongSong

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John Mark    @Johnmarkweb

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Carla Rashford    @CarlaRashford

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John Mark    @Johnmarkweb

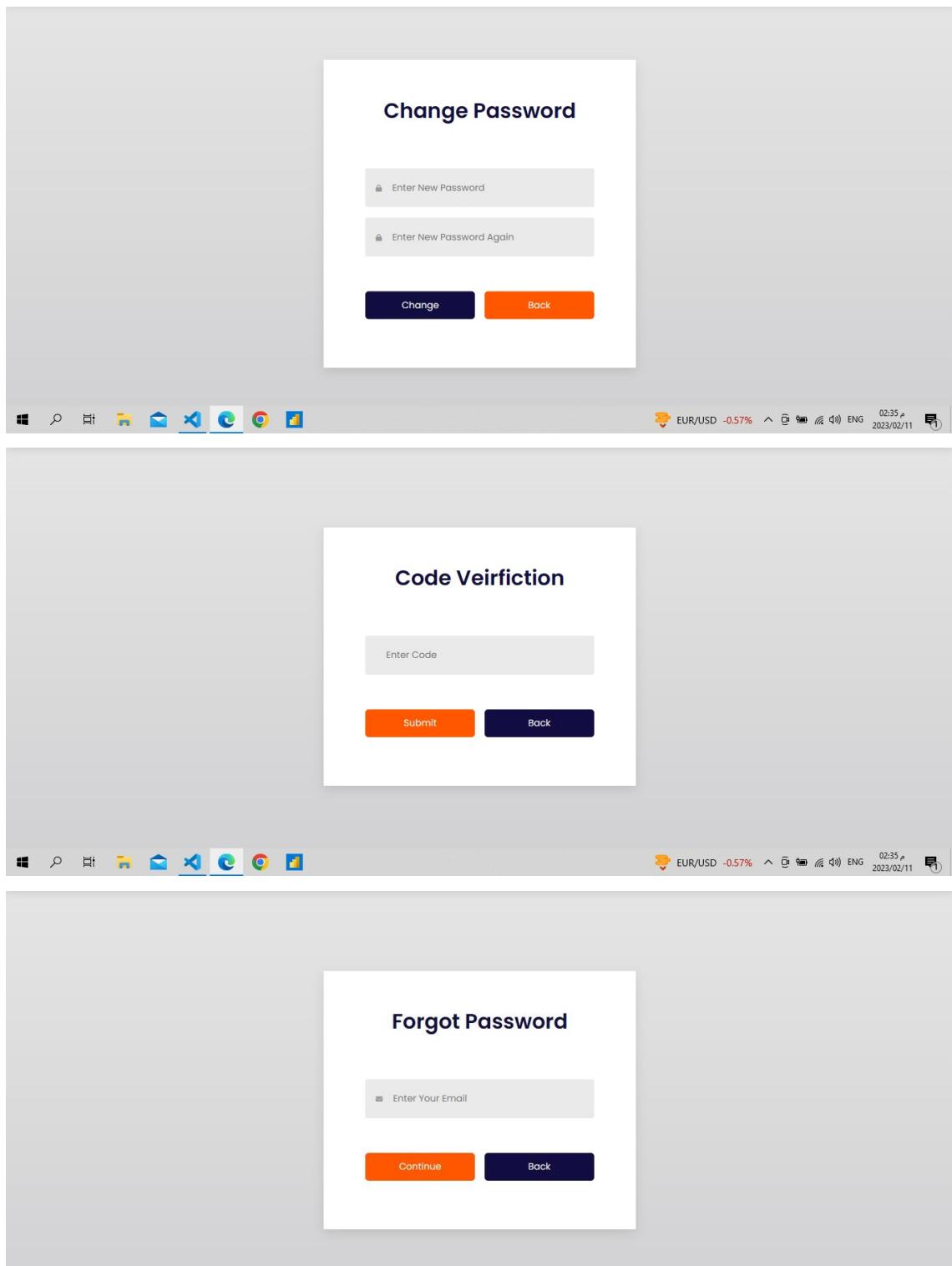
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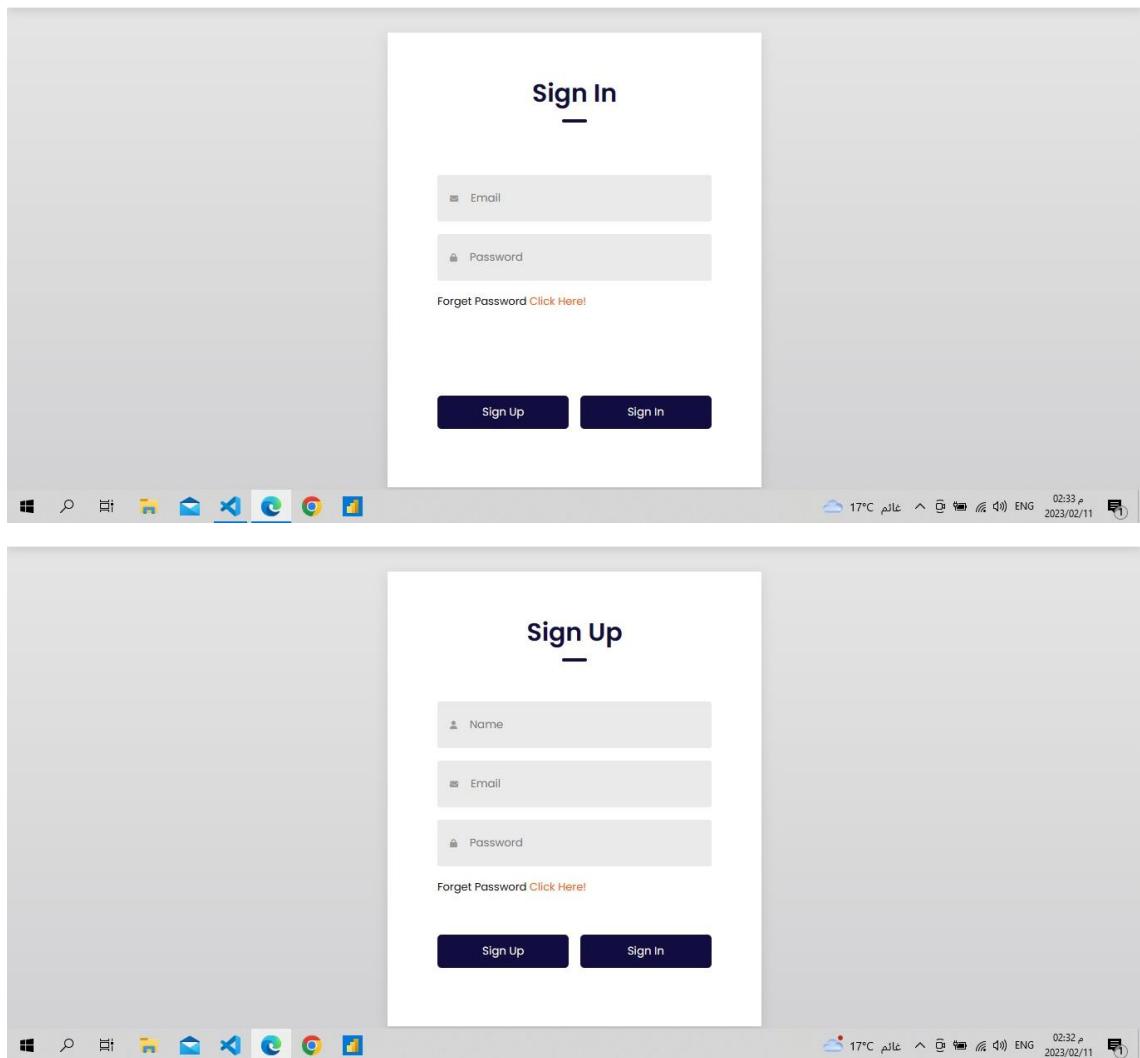
John Mark    @Johnmarkweb

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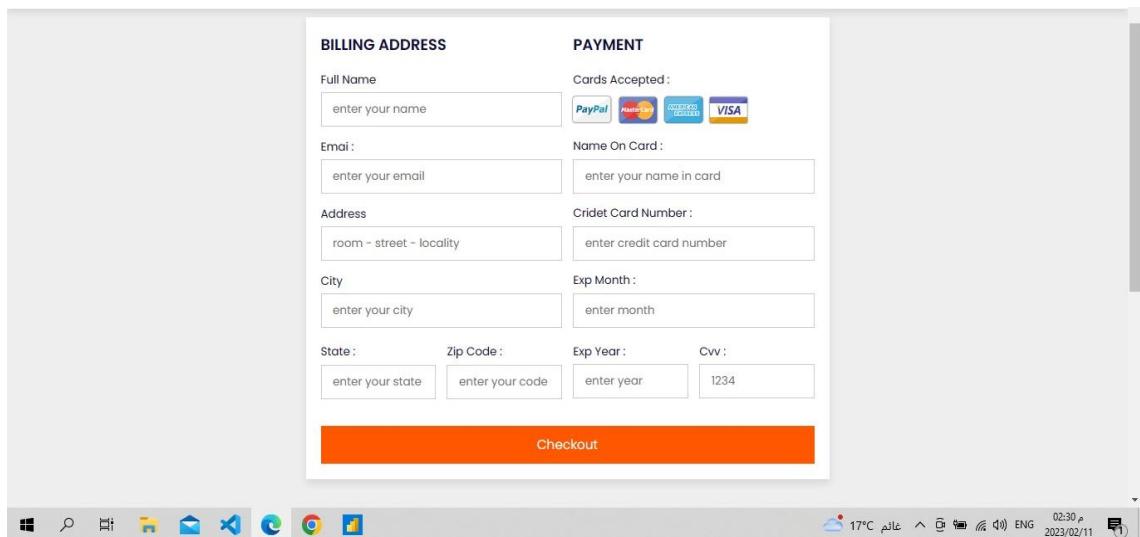
Contact Info **Quick Links** **Newsletter**

RIGSTER PAGE

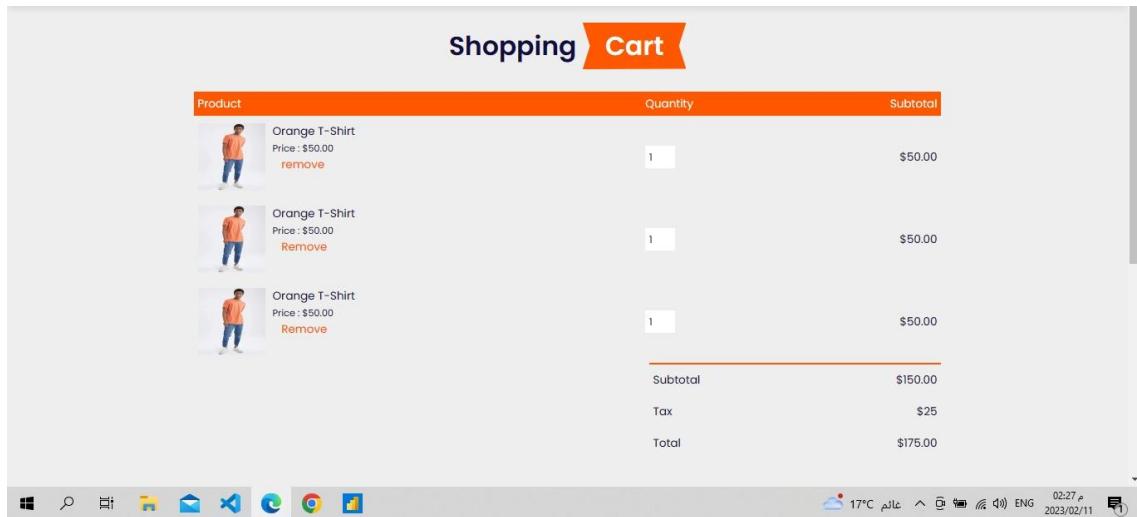




2.17 PAYMENT PAGE



2.18 CART PAGE

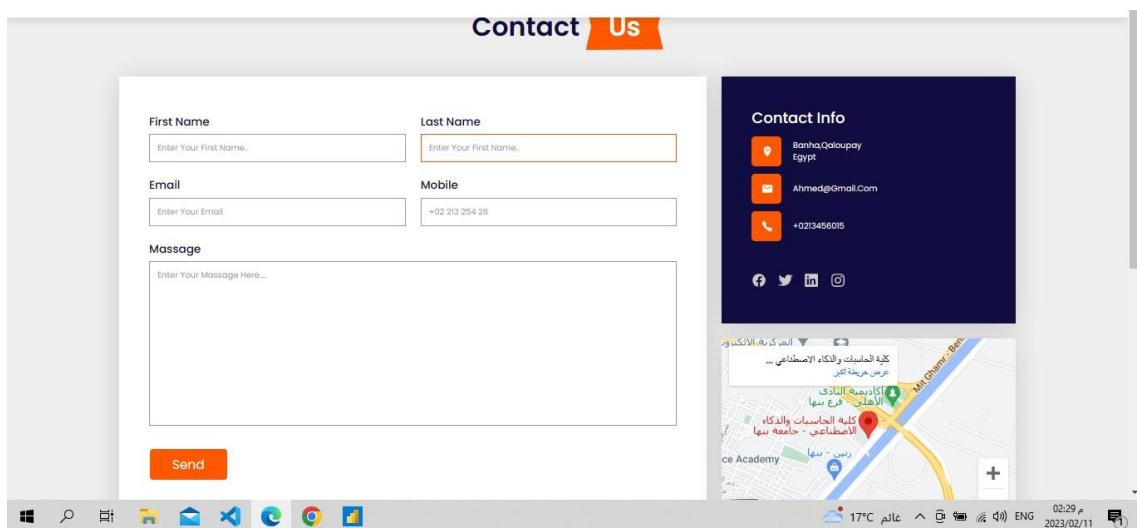


The screenshot shows a shopping cart page with the following details:

Product	Quantity	Subtotal
Orange T-Shirt Price : \$50.00 remove	1	\$50.00
Orange T-Shirt Price : \$50.00 Remove	1	\$50.00
Orange T-Shirt Price : \$50.00 Remove	1	\$50.00
Subtotal		\$150.00
Tax		\$25
Total		\$175.00

At the bottom, there is a toolbar with various icons and system status information: 17°C, 02:27 م, ENG, 2023/02/11.

2.19 CONTACT US PAGE



The screenshot shows a contact us page with the following sections:

- Contact Us** (Header)
- Contact Info** (Right sidebar):
 - Banha.Qaloupy Egypt
 - Ahmed@Gmail.Com
 - +0213456015
- Form Fields** (Left sidebar):
 - First Name:
 - Last Name:
 - Email:
 - Mobile:
 - Message:
- Send** (Orange button)
- Map** (Bottom right): A map showing the location of the contact point, with labels in Arabic: كلية الحاسوب والذكاء الاصطناعي, عرض حرية مصر, كلية الآداب, قرطاج, كلية الحاسوب والذكاء الاصطناعي - جامعة مصر للعلوم والتكنولوجيا, رمسيس - مصر.
- System Status** (Bottom right): 17°C, 02:29 م, ENG, 2023/02/11.

Dashboard pages

1- First page for monitoring the website

The screenshot shows a dashboard titled "Material Dashboard 2" with the following key components:

- Header:** Includes a search bar, an "ONLINE BUILDER" button, and a "Sign In" button.
- Left Sidebar:** Contains links for "Dashboard", "Tables", "Billing", "Virtual Reality", "RTL", and "Notifications".
- Top Metrics:** Four cards showing "Today's Money" (\$53k, +55% than last week), "Today's Users" (2,300, +3% than last month), "New Clients" (3,462, -2% than yesterday), and "Sales" (\$103,430, +5% than yesterday).
- Mid-Section:** Three charts: "Website Views" (bar chart for days of the week), "Daily Sales" (line chart for months), and "Completed Tasks" (line chart for months).
- Bottom Section:** "Projects" (30 done this month), "Orders overview" (24% this month), and a "Type here to search" bar.

2- Tables of all customers and their actions

The screenshot shows a web browser displaying a dashboard titled 'Material Dashboard 2 by Creative Tim'. The dashboard has a dark theme with a sidebar on the left containing links for 'Dashboard', 'Tables' (which is highlighted in pink), 'Billing', 'Virtual Reality', 'RTL', and 'Notifications'. The main content area features two tables: 'Authors Table' and 'Projects Table'. The 'Authors Table' lists six entries with columns for AUTHOR, FUNCTION, STATUS, and EMPLOYED. The 'Projects Table' is currently empty. The browser's address bar shows the URL '127.0.0.1:5500/pages/tables.html'. The taskbar at the bottom of the screen shows various application icons and the system tray with weather, battery, and network status.

AUTHOR	FUNCTION	STATUS	EMPLOYED
John Michael john@creative-tim.com	Manager Organization	ONLINE	23/04/18
Alexa Liras alexa@creative-tim.com	Programator Developer	OFFLINE	11/01/19
Laurent Perrier laurent@creative-tim.com	Executive Projects	ONLINE	19/09/17
Michael Levi michael@creative-tim.com	Programator Developer	ONLINE	24/12/08
Richard Gran richard@creative-tim.com	Manager Executive	OFFLINE	04/10/21
Miriam Eric miriam@creative-tim.com	Programator Developer	OFFLINE	14/09/20

3- All transactions through visa payments

The screenshot shows a dark-themed dashboard interface for 'Material Dashboard 2 by Creative Tim'. The left sidebar includes links for Dashboard, Tables, Billing (which is highlighted in pink), Virtual Reality, and RTL. The main content area is titled 'Billing' and displays a cardholder section with a card number (4562 1122 4594 7852), cardholder name (Jack Peterson), and expiration date (11/22). It also shows two payment method cards: 'Salary' (Belong Interactive) with a balance of +\$2000 and 'Paypal' (Freelance Payment) with a balance of \$455.00. A 'Payment Method' section contains two cards: a Mastercard and a Visa card. To the right, a 'Invoices' section lists transactions from March 2019 to March 2020, including invoices for Netflix. The bottom navigation bar includes a search bar, a taskbar with various icons, and a system tray with weather, battery, and connectivity status.

Pages / Billing

Billing

Material Dashboard 2

Dashboard

Tables

Billing

Virtual Reality

RTL

Notifications

ACCOUNT PAGES

UPGRADE TO PRO

127.0.0.1:5500/pages/billing.html

Getting Started how to save tabs in ch... New folder Machine Learning On... What is Backup as a S... YouTube WhatsApp Using TabLayouts in y...

Type here...

ONLINE BUILDER

Sign In

Invoices

VIEW ALL

March, 01, 2020 #MS-415646 \$180 PDF

February, 10, 2021 #RV-126749 \$250 PDF

April, 05, 2020 #FB-212562 \$560 PDF

June, 25, 2019 #QW-103578 \$120 PDF

March, 01, 2019 #AR-803481 \$300 PDF

Billing Information

Oliver Liam

Company Name: Viking Burrito

Email Address: oliver@burrito.com

DELETE EDIT

Your Transaction's

23 - 30 March 2020

Netflix

27 March 2020, at 12:30 PM

15°C 15°C ENG 04:27 PM

Type here to search

4- Billing information

The screenshot shows a Material Dashboard 2 application window. The left sidebar has a dark theme with white icons and text. It includes sections for Dashboard, Tables, Billing (which is highlighted with a pink background), Virtual Reality, RTL, and Notifications. Below these are Account Pages and an Upgrade to PRO button. The main content area has a dark background with white text. It displays 'Billing Information' for three users: Oliver Liam, Lucas Harper, and Ethan James, each with a 'DELETE' and 'EDIT' button. The 'Billing' section is also highlighted with a pink background. To the right, a 'Your Transaction's' section shows transactions from March 23-30, 2020, with a 'NEWEST' heading. Transactions include Netflix (- \$2,500), Apple (+ \$2,000), Stripe (+ \$750), HubSpot (+ \$1,000), Creative Tim (+ \$2,500), and Webflow (Pending). The bottom of the screen shows a taskbar with a search bar, system icons, and a system tray with a gear icon.

5- This is a virtual reality view

