App Settings In CRM, the App View feature allows administrators to manage and interact with different apps created within the platform. The feature provides a list of all the apps available in the system. Administrators have several actions they can perform on each app, including Edit, Clone, and Delete. Apps View By utilizing the App View feature, administrators can efficiently manage the apps within the CRM system. They can edit app settings to customize functionality, clone apps for streamlined app creation, and delete apps when they are no longer needed. This enables administrators to effectively tailor the CRM platform to meet the specific requirements of their organization. List All Apps: This feature in the CRM system provides administrators with an overview of all the apps available within the platform. It presents a comprehensive list of the apps that have been created and configured for use. The purpose of this feature is to provide Group Management - User Flow Diagram administrators with easy access to the apps and facilitate efficient app management. Each app is typically accompanied by three options that can be performed on the app. These options include: Edit App Clone App Delete App App Creation: The creation of an app allows businesses to tailor their CRM system to their specific needs, enhancing productivity and efficiency in managing customer relationships and business processes. There are total of five basic steps to create an app within a CRM system, you can follow these basic steps: Step 1 (App Info) The first step in creating an app within the CRM system involves providing the necessary App Info. The System Administrator is required to fill in specific details in the input fields during this step. (* Indicates Required Fields) App Name* The System Administrator needs to enter a unique name for the app. The System Administrator needs to enter the app name while considering the validation rules. Validation: There is a validation rule that allows only alphabets, numbers, and underscores. Spaces and special characters are not permitted in the app name because the developer name will then be auto-generated based on the app name entered. The chosen name serves as an essential identifier for the app within the CRM system. A well-chosen app name not only facilitates easy navigation and recognition but also provides users with a clear understanding of the app's role and significance. Developers Name* This field typically auto-generates based on the app name entered. Validation: Only Alphabets and Numbers with underscore allowed no spaces App Description (Optional) The System Administrator is required to provide a short introductory description of the app. This description offers a brief overview of what the app is about and its main features or functionalities. It helps to gain a quick understanding of the app's purpose and potential benefits. App Image/Logo* The System Administrator is required to upload an app image/logo. This serves as a visual representation of the app and helps administrators to easily locate and recognize the app, improving navigation and usability within the CRM system. When the administrator uploads an image there is a button that is typically provided at the top corner of the image. This cross button serves as a delete or remove option for the uploaded image. If the administrator wishes to delete the uploaded image and replace it with another image, they can simply click on the cross button. This action triggers the removal of the current image from the system. To optimize response times, all images are stored in an S3 bucket. This setup ensures that when the system administrator adds or updates images, the retrieval process benefits from the efficient S3 infrastructure, leading to reduced response times. This approach enhances the overall performance of image-related operations by leveraging the S3's streamlined data storage and retrieval mechanisms. User Flow Diagram Step 2 (Global Profiles) The Administrator will be able to assign the profiles to the app in this step. The Global Profiles feature in the CRM system enables administrators to add the details and configurations of a new app, including the assignment of profiles. When creating an app, the Global Profiles feature provides a Kanban-style interface to manage and assign profiles to which that particular app would be visible and have the permissions based on that. The interface includes two columns: All Profiles Column: This column displays a comprehensive list of all the profiles available in the CRM system. It allows administrators to review and select profiles that are relevant to the app being created. The list provides an overview of the available profiles, ensuring that administrators have a comprehensive range of options to choose from. Administrators can drag and drop the profiles from the All Profiles Column to the Selected Profiles Column. Administrators can also move the profiles into the both columns respectively by using the right and left arrows present next to each profile as per the column in which the profile exists. Selected Profiles Column: By this the administrator can select the profiles that he wants to assign with that app. Administrators can drag and drop the profiles from the All Profiles Column to the Selected Profiles Column. Administrators can also move the profiles into the both columns respectively by using the right and left arrows present next to each profile as per the column in which the profile exists. This action assigns the selected profiles to the app being created. The profiles listed in the Selected Profiles Column represent the profiles that are currently associated with the app. Step 01 - App Info Validation: A validation is implemented to ensure that at least one profile is selected before proceeding. User Flow Diagram Step 3 (Global Modules) This step of the app creation process allows administrators to add and manage modules within a specific app that is being created. Using a Kanban-style interface, administrators can easily select and add modules to the app. The Global Modules interface consists of two columns: All Modules Column: This column displays a comprehensive list of all available modules in the CRM system. Administrators can review the list to identify the modules that are relevant to the app being created or updated. It provides an overview of the available modules, ensuring administrators have a wide range of options to choose from. Administrators can also move the modules into the both columns respectively by using the right and left arrows present next to each profile as per the column in which the module exists. Selected Modules Column: Administrators can drag and drop modules from the All Modules Column to the Selected Modules Column. Administrators can also move the modules into the both columns respectively by using the right and left arrows as per the column present next to each profile in which the module exists. This action assigns the selected modules to the app, indicating that those modules are included in the app's functionality. The Selected Modules Column displays the modules that have been selected for the app. Validation: A validation is implemented to ensure that at least one module is selected before proceeding. Order Selection: System Administrators possess the ability to manage the display order of selected modules within the context of the app's edit mode. This is the same order for the modules followed when the system administrator sees these modules in the Edit Mode Screen. Step 02 - Global Profiles By transferring modules from the "All Modules" column to the "Selected Modules" column, administrators can establish a preferred order for the displayed modules. This process involves a straightforward drag-and-drop mechanism, enabling administrators to arrange modules as desired, specifying their positions, and enhancing the overall user experience of module navigation and interaction. i.e System Administrator moves the three modules from the all Modules Columns to the Selected Module Column. Now he is able to change the order for the selected modules like which is on first place, second place and so on by simply just dragging the column to their respective place. User Flow Diagram Step 4 (Permissions) In this step, the system administrator initially encounters a list of selected profiles within the “Selected Profiles” column alongside with the list of selected modules in the “Module” column. User Flow Diagram: Step 03 - Global Modules Step 5 (Completion/Success): When the system administrator presses the complete button then the popup modal opens and a notification appears immediately after the app is successfully created, serving as visual feedback to the user. Userflow Diagram: Edit App: This action enables administrators to modify the settings and configurations of a specific app. By selecting the Edit option, administrators can access and update various aspects of the app, such as: Step 1 (App Info) App Name Developer Name App Description App Image Step 2 (Global Profiles) Modify, Update or Remove the Assigned Profiles Step 3 (Global Modules) Modify, Update or Remove the Assigned Modules. Step 4 (Permissions) Step 04 - Permissions Screen In this step, the system administrator initially encounters a list of selected profiles within the “Selected Profiles” column alongside with the list of selected modules in the “Module” column. Upon clicking on any specific profile, the system administrator is presented with a list of all modules associated with that profile. When a system administrator clicks on a module, it initiates an expansion revealing the View Types and Views linked to that module. Similarly, upon clicking on a View Type, the system administrator can further expand the list to display all the individual views that belong to that specific View Type. These Views are interactive when a system administrator clicks on a specific View, they are directed to the corresponding edit mode screen. This edit mode screen provides them with access to the relevant data associated with that particular View. Clone App: Administrators can create a duplicate/clone of an existing app by selecting the Clone option. This functionality is useful when there is a need to create a similar app with similar configurations and settings as an existing one. The cloned app can then be customized further based on specific requirements. Validations: Unique App/Developer Name: When the administrator attempts to clone any app along with its features & functionalities, the system should check if the App and developer name entered is unique. This can be done by comparing the inputted name with the existing developer names in the system. If the name is already in use, an error message should be displayed, prompting the administrator to enter a different and unique developer name. Error: Developer name should be unique. This one already exists As the developer name is automatically generated by the system based on the app name from which the system administrator wants to create an app. So, The App name must be unique. Clone App Name: While cloning an app, The system automatically generates the app name at the time of cloning i.e App_clone. Either it is not the required field to change the app name but the administrator has the option to change the app name. This allows for easier identification of the cloned app and distinguishes it from the original app. The system should provide a field or prompt where the administrator can enter a new name for the cloned app. Initiate the Clone Second Time: If the System Administrator wants to clone the app for a second time within the CRM system, they would need to manually input a unique app name. This is because the system typically generates a unique app name, such as "App_Clone," only once during the initial cloning process. When initiating the second app cloning, the system does not automatically generate a new unique app name. Instead, the System Administrator must manually provide a distinct and unique name for the new cloned app. This ensures that each cloned app within the CRM system has a unique identifier and can be easily distinguished from other apps. Clone a Previously Cloned App: If the System Administrator wishes to clone a previously cloned app within the CRM system, the cloning process remains the same as for the app cloning. However, there is a consideration when it comes to naming the newly cloned app. The system automatically generated a name for the cloned app i.e App_Clone_Clone. Cancel/Quit Cloning Operation: If the System Administrator initiates the App Clone feature within the CRM system but decides to abandon or cancel the operation at any step, the system will display a prompt confirmation message to ensure that they intended to quit the cloning process. This prompt aims to prevent accidental termination of the cloning operation and provides an opportunity for the administrator to confirm their decision. The confirmation message may include a question such as "Are you sure you want to quit the cloning process?" or a similar inquiry to confirm the administrator's intention. The message serves as a precautionary measure to avoid any unintended consequences or data loss resulting from an incomplete or abandoned cloning operation. User Flow Diagram: Delete App: The Delete option allows administrators to remove an app from the system. When this action is selected, a validation process is typically initiated to confirm the deletion. This ensures that the app is intentionally deleted and prevents accidental removal of an app. User Flow Diagram: App Clone - User Flow Diagram Lead Mapping Refers to the process of mapping or aligning the fields and data from a lead source or external system to the corresponding fields in the CRM system. It ensures that the data collected from various lead sources is accurately and seamlessly transferred into the CRM, allowing for efficient lead management and follow-up. During lead mapping, administrators or users configure the mapping rules or settings to define how the data fields from the lead source should be mapped to the corresponding fields in the CRM. This mapping is typically based on field names, data formats, and data types. Modules Lead Fields w.r.t Module Fields Web to Lead To create a lead through a web form, CRM utilizes a lead generation feature that allows you to design and deploy a web form on your website. This web form serves as a mechanism for website visitors to submit their information and express their interest in your products or services. The process typically involves the following steps: Creating a new lead form: In the CRM if a system administrator looks for an option or feature that allows them to create a new lead form or web form. Click on it to initiate the form creation process. Delete App Module - User Flow Dia