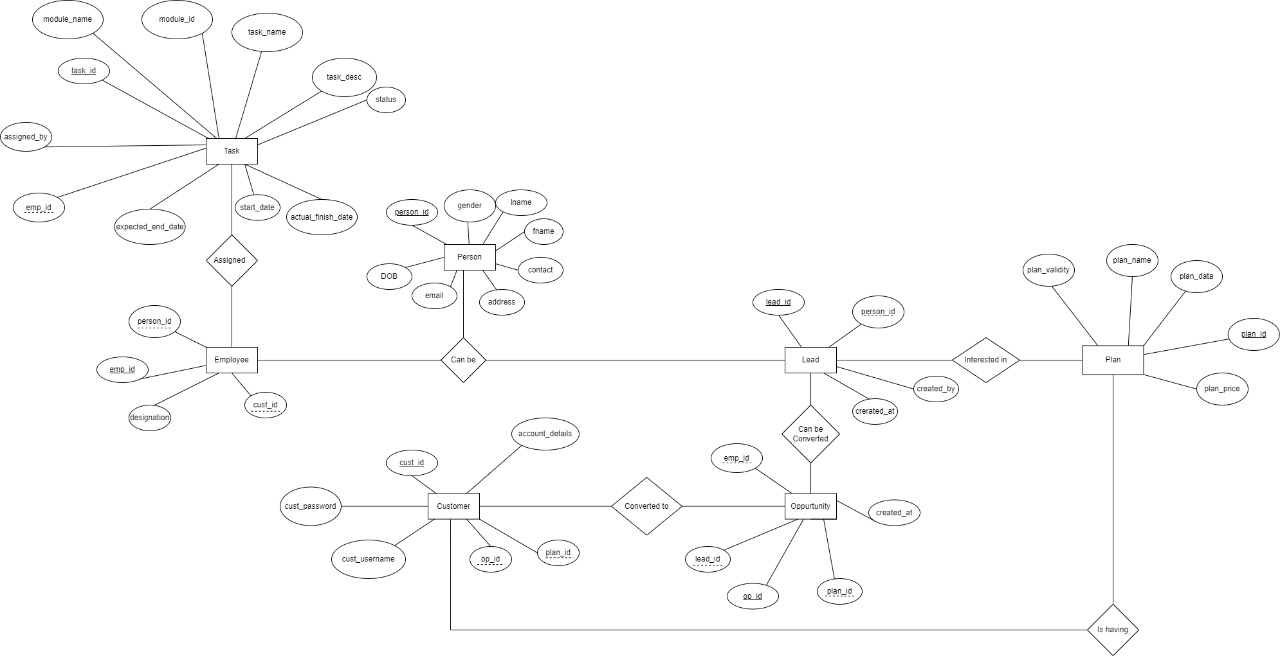
CRM QUERY

# ERD



# Create Normalized Tables Create database CRM and create tables create Indexing Use PK, FK, UK

-- creating table task

create table task(

task\_id int primary key,

task\_name varchar(25) not null,

task\_desc varchar(25) not null,

task\_status varchar(25) not null,

start\_date date,

expected\_end\_date date,

actual\_end\_date date,

assigned\_by varchar(25) not null,

module\_id int,

module\_name varchar(25) not null,

emp\_id int references employee(emp\_id)

);

--creating table person

create table person(

person\_id int primary key,

first\_name varchar(25) not null,

last\_name varchar(25) not null,

gender char(2),

date\_of\_birth date,

email varchar(255) not null,

contact\_no bigint,

address varchar(30)

);

--creating table plan

create table plan(

plan\_id int primary key,

plan\_name varchar(25),

plan\_validity varchar(25),

plan\_data varchar(20) not null,

plan\_price char(15) not null

);

--creating table employee

create table employee(

emp\_id int primary key,

designation varchar(25) not null,

person\_id int references person(person\_id),

cust\_id int references customer(cust\_id)

);

--creating table lead

create table lead(

lead\_id int primary key,

created\_at date not null,

created\_by varchar(30) not null,

person\_id int references person(person\_id)

);

--creating table opportunity

create table opportunity(

op\_id int primary key,

created\_at date not null,

op\_status varchar(30) not null,

emp\_id int references employee(emp\_id),

lead\_id int references lead(lead\_id),

plan\_id int references plan(plan\_id)

);

--creating table customer

create table customer(

cust\_id int primary key,

cust\_username varchar(30)not null,

cust\_password varchar(30)not null,

account\_details varchar(30) not null,

op\_id int references opportunity(op\_id),

plan\_id int references plan(plan\_id)

);

# Use Limit, Aggregrate Function, Joins, Use Int,decimal,varchar,tinyint,text,date,datetime etc Use views Query to Insert minimum 50 records lead the table.

-- inserting data in person table

insert into person(person\_id,first\_name,last\_name,gender,date\_of\_birth,email,contact\_no,address)

values (01,'Aman','Sharma','M','1998-03-20','aman@gmail.com',489238324,'Pune'),

(02,'Anand','Sharma','M','1999-03-02','anand@gmail.com',390989892,'Pune'),

(03,'Aarohi','Verma','F','2008-11-20','aarohi@gmail.com',909032423,'Patiala'),

(04,'Ravi','Karn','M','2003-08-08','ravi@gmail.com',9902839423,'Delhi'),

(05,'Riya','Raj','F','1995-10-01','riya@gmail.com',988891233,'Mumbai'),

(06,'Sia','Sharma','F','1997-03-03','sia@gmail.com',892323434,'Patna'),

(07,'Sia','Farukh','F','1998-08-05','shreya@gmail.com',999889823,'Delhi'),

(08,'Aditi','Raj','F','1999-03-11','aditi@gmail.com',776879234,'Dehradun'),

(09,'Ajay','Dave','M','1998-05-05','ajay@gmail.com',89983444,'Sikkim'),

(10,'Ajay','Singh','M','1993-04-30','aditya@gmail.com',997732944,'Lucknow'),

(11,'Hiren','haran','M','1996-11-30','hiren@gmail.com',9923483424,'Bangalore'),

(12,'Shilpa','Sharma','F','2001-12-23','shilpa@gmail.com',55399355,'Chennai'),

(13,'Saurabh','Singh','M','1993-12-12','abhishek@gmail.com',88832422,'Pune'),

(14,'Frank','woods','M','1995-11-30','frank@gmail.com',923422444,'Hyderabad'),

(15,'Soap','Mctavish','M','1993-04-30','soap@gmail.com',88324772,'Ranchi')

-- inserting data in lead table

insert into lead(lead\_id,created\_at,created\_by,person\_id)

values(1,'2021-09-04',1,1),

(2,'2021-09-09',2,2),

(3,'2020-10-04',2,3),

(4,'2019-10-07',1,4),

(5,'2021-04-04',3,5),

(6,'2021-08-11',3,6),

(7,'2012-12-04',2,7),

(8,'2020-10-05',3,8),

(9,'2021-01-18',4,9),

(10,'2021-03-25',4,10)

-- inserting data in plan table

insert into plan(plan\_id,plan\_name,plan\_validity,plan\_data,plan\_price)

values(1,'cricket','3 months','20mbps','1500'),

(2,'new year','6 months','30mbps','1800'),

(3,'regular','3 months','15mbps','1000'),

(4,'wfh','8 months','75mbps','2000'),

(5,'christmas','6 months','18mbps','1200')

-- inserting data in opportunity table

insert into opportunity(op\_id, created\_at, op\_status, emp\_id, lead\_id, plan\_id)

values(1, '2021-10-03','true',2,2,1),

(2, '2020-10-10','true',2,3,5),

(3, '2021-10-03','false',1,1,3),

(4, '2021-11-10','true',4,9,4),

(5, '2019-10-10','false',1,4,1),

(6, '2015-10-27','true',2,7,4),

(7, '2021-10-06','false',3,6,4),

(8, '2021-07-03','true',3,5,1),

(9, '2021-08-18','true',4,10,4),

(10, '2021-01-03','true',3,8,5)

-- inserting data in customer table

insert into customer(cust\_id,cust\_username,cust\_password,account\_details,plan\_id)

values(1,'ravi','ravil123',1,3),

(2,'riya','riya123',2,3),

(3,'anand','anand123',3,5),

(4,'sia','sia123',4,4),

(5,'ajay','ajay123',5,4),

(6,'aarohi','aarohi123',2,4)

-- inserting data in employee table

insert into employee(emp\_id,designation,person\_id,cust\_id)

values(1,'manager',11,1),

(2,'admin',12,4),

(3,'manager',13,5),

(4,'manager',14,4),

(5,'admin',11,2)

-- inserting data in task table

insert into task(task\_id, task\_name,task\_desc,task\_status,start\_date,expected\_end\_date,actual\_end\_date,assigned\_by,module\_id,module\_name,emp\_id)

values(1,'t001','lead to customer','on hold','2021-10-19','2022-03-15',null,11,1,'lead',1),

(2,'t002','lead to customer','Done','2021-01-15','2021-02-15','2021-03-03',12,2,'customer',2),

(3,'t003','lead to customer','processing','2021-01-15','2021-12-15',null,13,1,'lead',3),

(4,'t004','new plan to customer','Done','2021-03-13','2021-03-10',null,14,2,'customer',4),

(5,'t005','lead to customer','processing','2021-03-13','2021-10-28','2021-12-01',15,2,'customer',5)

# Query to convert Lead to Opportunity, Account

update opportunity

set op\_status = 'true'

where op\_id = 3

# Query to get a list of all leads

select \* from lead;

# Query to get all leads which converted to Opportunity

select \* from lead

join opportunity op

on lead.lead\_id = op.lead\_id

where op\_status = 'true'

# Query to get all leads converted to Account

--Query to get all leads converted to Account

select le.lead\_id ,le.created\_at, le.person\_id, cus.cust\_id, op.op\_id

from lead le

join opportunity op ON opp.lead\_id = le.lead\_id

join customer cus ON cus.op\_id = op.op\_id;

# Query to get All contacts of an Account

select le.lead\_id ,le.created\_at, le.person\_id, cus.cust\_id, op.op\_id

from lead le

join opportunity op ON op.lead\_id = le.lead\_id

join customer cus ON cus.op\_id = op.op\_id;

# Query to get the count of task Module wise

select count(\*) from task group by module\_id

# Query to get All tasks of Leads, Opportunity, Account

select \* from task

where module\_name in ('lead','opportunity','customer')

# Query to get all accounts that do not have contacts

select cus.cust\_id , pe.person\_id, pe.contact\_no, pe.first\_name

from customer cus

join opportunity op ON op.op\_id = cus.op\_id

join lead le ON le.lead\_id = op.lead\_id

join person pe ON pe.person\_id= le.person\_id

where pe.contact\_no = 0;

# Query to get all task which is not created today.

select \* from task

where start\_date != '2021-12-05'

# Query to get all the task completed

select \* from task

where task\_status = 'Done'

# Query to get all upcoming tasks

select \* from task

where expected\_end\_date > '2021-12-05'

# Query to fetch account and its contacts with account id, account name

select cus.cust\_id , cus.account\_details, pe.contact\_no, pe.first\_name

from customer cus

join opportunity op ON op.op\_id = cus.op\_id

join lead le ON le.lead\_id = op.lead\_id

join person pe ON pe.person\_id= le.person\_id;

# Query to get the count of leads which is converted to account

select count(\*)

from lead

join opportunity op

on lead.lead\_id = op.lead\_id

where op\_status = 'true'

# Query to get all Opportunity

select \* from opportunity

# Query to get all Opportunity which converted to Account

select \* from opportunity

where op\_status = 'true'

# Query to get count which plan is taken how many times

select count(plan\_id) from customer group by plan\_id;