Practice Project: Customer360



Estimated time needed: 45 minutes

This practice project will give you first hand experience applying the skills you learned in Django application development.

Scenario

Your organization is consolidating different platforms and wants to store customer communication records in a central location. As a software engineer, you are tasked to develop this Customer360 application using Django.

A communication record stores Channel, Direction (inbound or outbound) and Summary.

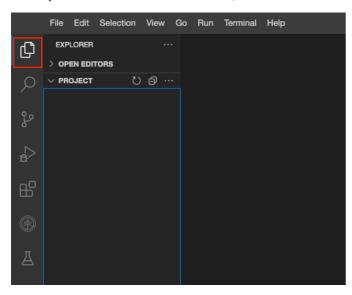
Objectives

- · Develop a screen to capture communication record
- Display interaction in last 30 days
- Provide professional customer management

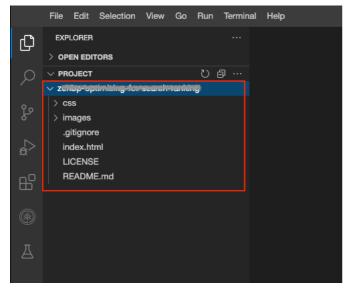
Working with Files in Cloud IDE

If you are new to Cloud IDE, this section will show you how to create and edit files that are part of your project in Cloud IDE.

To view your files and directories inside Cloud IDE, click the file icon to reveal it.

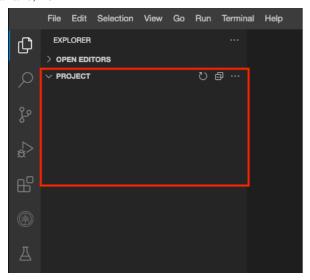


If you have cloned (using the git clone command) boilerplate/starting code, then it will look like the image below:



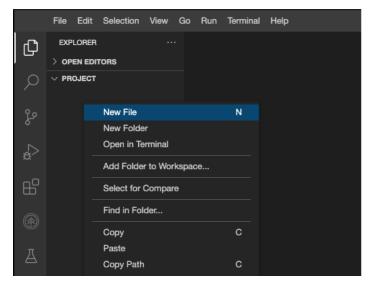
If you have not cloned and are starting with a blank project, it will look like this:

about:blank 1/21

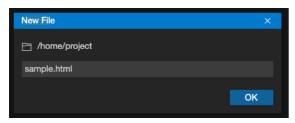


Create a New File

To create a new file in your project, right-click and select the New File option. You can also choose File -> New File to do the same.

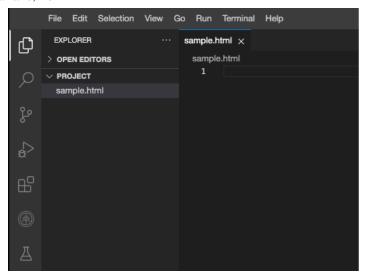


You will then be prompted to name the new file. In this scenario, let's name it sample.html.

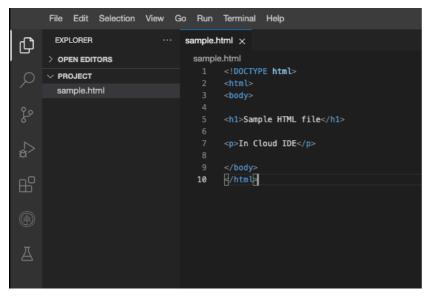


Clicking the file name sample.html in the directory structure will open the file on the right pane. You can create all different types of files; for example, FILE_NAME.js for JavaScript files.

about:blank 2/21

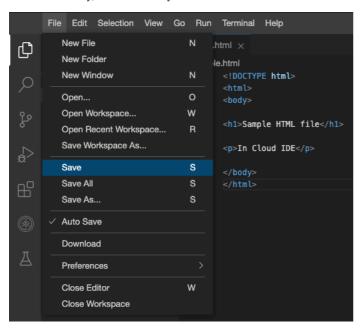


In the example below, we pasted some basic HTML code and then saved the file.



We save this file by:

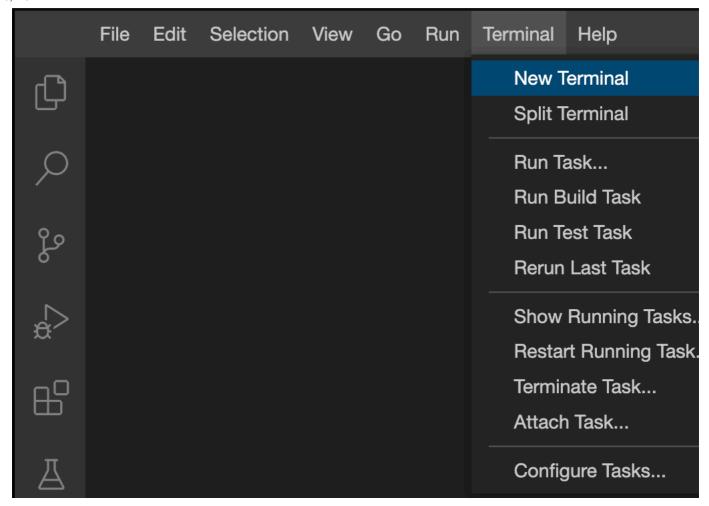
- Going to the menu.
- Press Command + S on Mac or CTRL + S on Windows.
- Alternatively, it will Autosave your work as well.



Set-up: Create a Django Application

1. Open a terminal window using the editor's menu: Select **Terminal > New Terminal**.

about:blank 3/21



2. If you are not currently in the project folder, copy and paste the following code to change to your project folder. Select the copy button to the right of the code to copy it.

cd /home/project

3. Ensure pip is installed.

python3.11 -m ensurepip

4. Install Django.

python3.11 -m pip install Django

5. Create a project.

django-admin startproject customer360

about:blank 4/21

6. Change the directory so that it works in the lab.

cd customer360

7. Run migration before running the application for the first time.

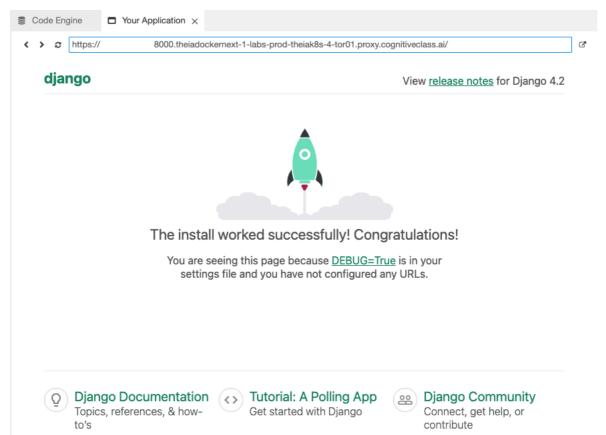
python3.11 manage.py migrate

8. Run the server successfully this time.

python3.11 manage.py runserver

Launch Application

9. It will look like the image below:



about:blank 5/21

10. In your terminal, press CTRL+C to stop your web server.

Task 1: Modify Settings

Now that your environment project is set up, you are set to start doing work.

Each application you write in Django consists of a Python package that follows a certain convention. Django comes with a utility that automatically generates the basic directory structure of an app, so you can focus on writing code rather than creating directories.

You will make changes to settings.py in the customer360 app:

Open settings.py in IDE

Allowed Hosts

A list of strings representing the host/domain names that this Django site can serve.

```
ALLOWED_HOSTS=["*"]
```

Installed Apps

A list of strings designating all applications that are enabled in this Django installation. Each string should be a dotted Python path to:

- an application configuration class (preferred), or
- a package containing an application.

```
INSTALLED_APPS = [
  'django.contrib.admin',
  'django.contrib.auth',
  'django.contrib.contenttypes',
  'django.contrib.sessions',
  'django.contrib.messages',
  'django.contrib.staticfiles',
  'customer360'
]
```

List of Trusted Origins

A list of trusted origins for unsafe requests (for example, POST).

For requests that include the Origin header, Django CSRF protection requires that the header match the origin present in the Host header.

```
CSRF_TRUSTED_ORIGINS = ['https://*.cognitiveclass.ai']
```

Import OS

To be able to use path property. You need to import the os module. Add an import statement near the top of the file after from pathlib...

```
from pathlib import Path
import os
```

Configure Additional Static Files Directory

This setting defines the additional locations the staticfiles app will traverse if the FileSystemFinder finder is enabled, for example, if you use the collectstatic or findstatic management command or use the static file serving view.

For clarity, add it after STATIC_URL.

```
STATICFILES_DIRS = (
    os.path.join(BASE_DIR,"static/"),
```

You can see the complete file below.

▼ Completed settings.py

```
Django settings for customer360 project.
Generated by 'django-admin startproject' using Django 4.2.4.
For more information on this file, see https://docs.djangoproject.com/en/4.2/topics/settings/For the full list of settings and their values, see
https://docs.djangoproject.com/en/4.2/ref/settings/
from pathlib import Path
import os
# Build paths inside the project like this: BASE_DIR / 'subdir'.

BASE_DIR = Path(__file__).resolve().parent.parent

# Quick-start development settings - unsuitable for production

# See https://docs.djangoproject.com/en/4.2/howto/deployment/checklist/

# SECURITY WARNING: keep the secret key used in production secret!
SECRET_KEY = 'django-insecure-mxj20imb1j!8hz2!kqt*qh5^=y3q3^hyknmj**bpi9v2vuhr!p'
# SECURITY WARNING: don't run with debug turned on in production!
DEBUG = True
ALLOWED_HOSTS = ["*"]
CSRF_TRUSTED_ORIGINS = ['https://*.cognitiveclass.ai']
# Application definition
INSTALLED_APPS = [
      'django.contrib.admin',
     'django.contrib.auth',
     'django.contrib.contenttypes',
      'django.contrib.sessions',
     'django.contrib.messages
     'django.contrib.staticfiles',
     'customer360'
MIDDLEWARE = [
      'django.middleware.security.SecurityMiddleware'
     'django.contrib.sessions.middleware.SessionMiddleware',
     'django.middleware.common.CommonMiddleware',
'django.middleware.csrf.CsrfViewMiddleware',
     'django.contrib.auth.middleware.AuthenticationMiddleware',
     'django.contrib.messages.middleware.MessageMiddleware'
     'django.middleware.clickjacking.XFrameOptionsMiddleware',
ROOT_URLCONF = 'customer360.urls'
TEMPLATES = [
     {
           'BACKEND': 'django.template.backends.django.DjangoTemplates',
          'DIRS': [],
'APP_DIRS': True,
           'OPTĪONS': {
                'context_processors': [
                      'django.template.context_processors.debug'
                     'django.template.context_processors.request'
                     'django.contrib.auth.context_processors.auth'
                      'django.contrib.messages.context_processors.messages',
               ],
          },
     },
WSGI_APPLICATION = 'customer360.wsgi.application'
# Database
# https://docs.djangoproject.com/en/4.2/ref/settings/#databases
DATABASES = {
   'default': {
           'ENGINE: 'django.db.backends.sqlite3',
           'NAME': BASE_DIR / 'db.sqlite3',
     }
# Password validation
# https://docs.djangoproject.com/en/4.2/ref/settings/#auth-password-validators
AUTH_PASSWORD_VALIDATORS = [
           'NAME': 'django.contrib.auth.password_validation.UserAttributeSimilarityValidator',
     },
     {
           'NAME': 'django.contrib.auth.password_validation.MinimumLengthValidator',
     },
{
           'NAME': 'django.contrib.auth.password_validation.CommonPasswordValidator',
     },
     {
           \verb|'NAME': 'django.contrib.auth.password_validation.NumericPasswordValidator'|, \\
     },
]
```

7/21 about:blank

Task 2: Create Models

Let's define our models that will help us store data and build the UI.

A model is the single, definitive source of information about your data. It contains the essential fields and behaviors of the data you're storing. Generally, each model maps to a single database table.

Define models

Start with creating a model file in customer360/customer360/models.py. Run the following script to create the file.

touch /home/project/customer360/customer360/models.py

Open models.py in IDE

And define the following:

Import

from django.db import models

Customer Model

```
class Customer(models.Model):
    id = models.AutoField(primary_key=True)
    name = models.CharField(max_length=100)
    email = models.EmailField(max_length=100)
    phone = models.CharField(max_length=20)
    address = models.CharField(max_length=200)
    def __str__(self):
        return str(self.id)
```

Interaction model

about:blank 8/21

```
('email', 'Email'),
   ('letter', 'Letter'),
]

DIRECTION_CHOICES = [
    ('inbound', 'Inbound'),
    ('outbound', 'Outbound'),
]

customer = models.ForeignKey(Customer, on_delete=models.CASCADE)
channel = models.CharField(max_length=15, choices=CHANNEL_CHOICES)
direction = models.CharField(max_length=10, choices=DIRECTION_CHOICES)
interaction_date = models.DateField(auto_now_add=True)
summary = models.TextField()
```

You can see the complete file below.

▼ Completed models.py

Task 3: Create Templates

You now need to add a few HTML files that will show our models and let users interact with the application.

```
mkdir /home/project/customer360/customer360/templates
touch /home/project/customer360/customer360/templates/add.html
touch /home/project/customer360/customer360/templates/base.html
touch /home/project/customer360/customer360/templates/index.html
touch /home/project/customer360/customer360/templates/interact.html
touch /home/project/customer360/customer360/templates/summary.html
```

You should review each HTML content as you paste the models into the relevant file.

base.html

You will start with base template, aptly named as base.html. This file contains sections that we will fill in with other templates.

```
Open base.html in IDE

{% load static %}
<!DOCTYPE html>
<html>
```

about:blank 9/21

```
<link rel="stylesheet" href="https://maxcdn.bootstrapcdn.com/bootstrap/3.4.1/css/bootstrap.min.css">
       <script src="https://maxcdn.bootstrapcdn.com/bootstrap/3.4.1/js/bootstrap.min.js"></script>
       <link rel="stylesheet" href="{% static 'css/main.css' %}">
   </head>
   <body>
       <
                     <a style="color:black;" href="/">Home</a>
                  <
                     <a style="color:black;" href="/create">New Customer</a>
                  <
                     <a style="color:black;" href="/summary">Summary</a>
                  </nav>
       {% block content %}
{% endblock %}
   </body>
</html>
```

index.html

Next you will fill the index.html with HTML content. This is our landing page.

```
Open index.html in IDE
```

```
{% extends 'base.html' %}
{% load static %}
{% block content %}
<html>
   <head>
      <title>Home Page</title>
   </head>
   <script>
     function set_customer(){
      var cinput = document.querySelector('input[name="selected_customers"]:checked');
          if (cinput){
             cid = cinput.value;
window.location = "/interact/"+cid;
             alert("Please select a customer");
   </script>
   <br/><body>
<h1>Welcome to Customer 360</h1>
      < a class="btn btn-primary" style="font-weight:bold; display:inline" onclick="set_customer()">Interact</a>
      <thead>
             Customer ID
                 Name
                 Email
                 Phone
                 Address
                Selected
             </thead>
          {% for customer in customers %}
                    {{customer.id }}
                    {{customer.name}}
                    {{customer.email }}
                    <input type="radio" name="selected_customers" value="{{ customer.id }}">
                    {% endfor %}
          </body>
</html>
{% endblock content %}
```

about:blank 10/21

add.html

You will now create the template for adding a new customer. You will notice that it extends to base.html.

```
Open add.html in IDE
```

```
{% extends 'base.html' %}
{% load static %}
{% block content %}
<html>
   <head:
       <title>Add a Customer</title>
   </head>
   <body>
       <h1>Add a new Customer</h1>
       <div class="form-group">
              <lass= Tof m=group /
<label for="Name">Name </label>
<input type="text" name="name" required>
           </div>
          </div>
          </div>
           <div class="form-group">
              <label for="Address">Address</label>
<input type="text" name="address" required>
           <button type="submit" class="btn btn-success">Add</button>
            {{ msg }} 
       </form>
   </body>
</html>
{% endblock content %}
```

interact.html

To record an interaction with a customer, we use the template interact.html.

Open interact.html in IDE

```
{% extends 'base.html' %}
{% load static %}
{% block content %}
<html>
    <head>
         <title>Interact & Manage</title>
    </head>
    <scrint>
         function selectButton(element) {
             var buttons = element.parentElement.getElementsByClassName("btn");
for (var i = 0; i < buttons.length; i++) {
   buttons[i].classList.remove("active");</pre>
             element.classList.add("active");
         function check_selected(){
             var dirinput = document.querySelector('input[name="direction"]:checked');
var chaninput = document.querySelector('input[name="channel"]:checked');
             var summary = document.querySelector('textarea[name="summary"]').value;
if (!dirinput || !chaninput || summary === ""){
    alert("Please fill all required fields");
                  return false;
             return true;
    </script>
     <body>
         <div class="form-group">
                  <lasa= 'form-gloop'
<label>Channel</label>
<div class="btn-group" data-toggle="buttons">
                       </label>
                      {% endfor %}
                  </div>
             </div>
             <div class="form-group">
                  <label>Direction</label>
```

about:blank 11/21

summary.html

Finally, you will fill the HTML template summary.html as follows:

```
Open summary.html in IDE
```

```
{% extends 'base.html' %}
{% load static %}
{% block content %}
<html>
    <body>
       <h1> Interactions in last 30 Days </h1>
{% if not interactions %}
            there are no interactions in the last 30 days 
       {% else %}

               <thead>
                       Channel
                       Direction
                       Count
                   </thead>

{% for interaction in interactions %}
                       $$ \time {\{ interaction.channel \}} 
                          {{ interaction.direction }}
</d>
{{ interaction.count }} 
</d>
                       {% endfor %}
               <h4> Total : {{ count }} </h4>
       {% endif %}
   </body>
</html>
{% endblock content %}
```

Task 4: Create Views

You will now create customer360/customer360/views.py to define views.

touch /home/project/customer360/customer360/views.py

Open views.py in IDE

Define Imports

about:blank 12/21

```
from django.shortcuts import render
from datetime import date, timedelta
from django.db.models import Count
from .models import *
```

Define Index View

```
def index(request):
    customers = Customer.objects.all()
    context = {"customers":customers}
    return render(request, "index.html", context=context)
```

Define Create Customer View

```
def create_customer(request):
    if request.method == "POST":
        name = request.POST["mame"]
        email = request.POST["email"]
        phone = request.POST["phone"]
        address = request.POST["address"]
        customer = Customer.objects.create(name=name,email=email,phone=phone,address=address)
        customer.save()
        msg = "Successfully Saved a Customer"
        return render(request,"add.html",context={"msg":msg})
    return render(request,"add.html")
```

Define Summary View

Define Interaction View

about:blank 13/21

Completed File

You can see the completed file below.

▼ Completed views.py

```
from django.shortcuts import render
 from datetime import date, timedelta from django.db.models import Count from . models import *
 # Create your views here.
# Create your views here.
def index(request):
    customers = Customer.objects.all()
    context = {"customers":customers}
    return render(request, "index.html",context=context)
def create_customer(request):
    if request.method == "POST":
        name = request.POST["name"]
        email = request.POST["email"]
        nhone = request.POST["bhone"]
               phone = request.POST["phone"]
address = request.POST["address"]
customer = Customer.objects.create(name=name,email=email,phone=phone,address=address)
               customer.save()
msg = "Successfully Saved a Customer"
return render(request, "add.html", context={"msg":msg})
        return render(request, "add.html")
def summary(request):
    thirty_days_ago = date.today() - timedelta(days=30)
    interactions = Interaction.objects.filter(interaction_date__gte=thirty_days_ago)
        count = len(interactions)
        interactions = interactions.values("channel","direction").annotate(count=Count('channel'))
        context={
                              "interactions":interactions, "count":count
return render(request, "summary.html", context=context)
def interact(request, cid):
        channels = Interaction.CHANNEL_CHOICES
       directions = Interaction.DIRECTION_CHOICES
context = {"channels":channels,"directions":directions}
if request.method == "POST":
               customer = Customer.objects.get(id=cid)
channel = request.POST["channel"]
               direction = request.POST["direction"]
               summary = request.POST["summary"]
interaction = Interaction.objects.create(
                                                                  channel=channel,
                                                                  direction=direction,
                                                                  summary=summary)
               interaction.save()
context["msg"] = "Interaction Success"
return render(request, "interact.html", context=context)
        return render(request, "interact.html", context=context)
```

Task 5: Create URLs

A clean, elegant URL scheme is an important detail in a high-quality web application. Django lets you design URLs however you want, with no framework limitations.

You will make changes to urls.py in the customer360 app:

Open **urls.py** in IDE

Import Views

from . import views

about:blank 14/21

Add URL Patterns

```
urlpatterns = [
  path('admin/', admin.site.urls),
  path('',views.index,name="index"),
  path('create/',views.create_customer,name='create_customer'),
  path('interact/<int:cid>',views.interact,name='interact'),
  path('summary/',views.summary,name='summary'),
]
```

You can see the complete file below.

▼ Completed urls.py

```
from django.contrib import admin
from django.urls import path
from . import views
urlpatterns = [
    path('admin/', admin.site.urls),
    path('',views.index,name="index"),
    path('create/',views.create_customer,name='create_customer'),
    path('interact/<int:cid>',views.interact,name='interact'),
    path('summary/',views.summary,name='summary'),
]
```

Task 6: Add Styling

To visually enhance the user experience, you are given the following CSS which you should add to your application.

```
mkdir -p /home/project/customer360/static/css
touch /home/project/customer360/static/css/main.css
```

Open main.css in IDE

CSS content

```
body{
     text-align: center;
     margin: auto;
h1,p{
     font-weight: bold;
table{
     margin: auto;
     border: 2px solid #000000;
margin-top: 50px;
border-radius: 15px;
     background-color: white;
text-align: center;
      text-align: center;
.nav{
     width: 200%;
     border: 2px solid black;
border-radius: 10px;
     margin-right: 6%;
margin-left: 6%;
     font-size: large;
font-weight: bold;
      margin: auto;
```

about:blank 15/21

```
margin-top: 20px;
background-color: white;
text-align: center;
      width: 50%;
height: 50%;
      border: 2px solid black;
      border-radius: 10px;
.form-group{
   display: flex;
   flex-direction: column;
      align-items: flex-start;
      width:100%;
padding: 10px;
text-align: left;
      margin-top: 10px;
width: 100%;
input[type="text"],input[type="email"],input[type="tel"]{
   width: 100%;
textarea{
      width: 500px;
      height: 200px;
.btn{
      display: flex;
      margin-top: 10px;
margin-bottom: 10px;
padding-left: 50px;
      padding-right: 50px;
      text-align: left;
margin-left: 10px;
.active {
      background-color: #007bff;
      color: #fff;
```

Task 7: Run the Application

```
cd /home/project/customer360
python3.11 manage.py makemigrations customer360
python3.11 manage.py migrate
python3.11 manage.py runserver
```

Launch Customer360

Launch

When you launch the Customer360 app you will see a similar view as shown below.

< > 2 https://

 $\cdot 8000. the iadockern ext-1-labs-prod-the iak8s-4-tor 01. proxy. cognitive class. ai/$

Home New Customer Su

Welcome to Customer 360

Interact and Manage your Customers

Interact

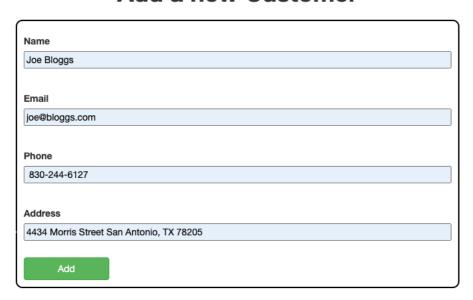
Customer ID Name Email Phone Address

about:blank 16/21

New Customer

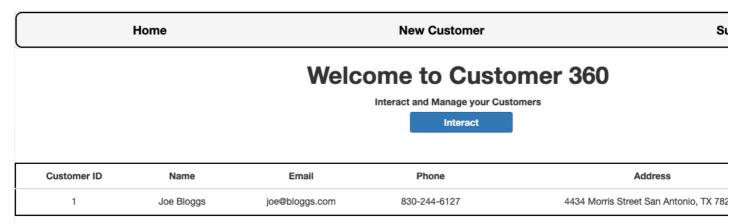
There are no customer records because you are running it for the first time. Let's add one.

Add a new Customer



List of Customers

You can now see your newly added customer on the main page.



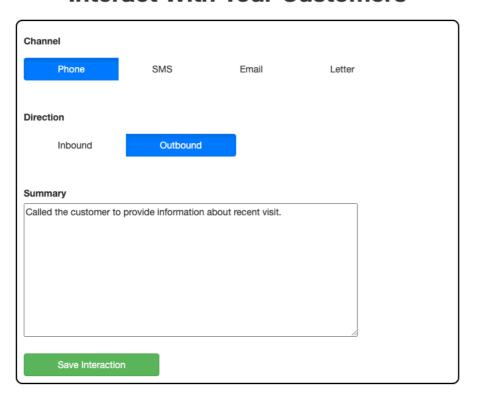
New Interaction record

You will now record a new interaction for this customer, by selecting the customer record and then Interact.

Then fill in the interaction details.

about:blank 17/21

Interact With Your Customers



Summary

You can now go to the Summary page.

Interactions in last 30 Days

Channel	Direction
phone	outbound

Total: 1

Task 8: Modifications (Optional)

Your challange now is to enhance the Customer360 app and add some functionality. You can discuss these modifications with your peers.

- 1. Add a new field to customer model
- 2. Create a new interaction channel

Add social media Field to Customer

Model change

In the Customer model, add a new optional field called social_media. And display it with customer details.

▼ Hint

new_field = models.data_type(args)

▼ Solution

social_media = models.CharField(max_length=100, blank=True)

about:blank

Template change

Now you need to ensure that the new field social_media is added to the customer create form.

▼ Hint

```
<div class="form-group">
    <label for="Field">Field Label </label>
    <input type="Type" name="Name">
</div>
```

▼ Solution

```
<div class="form-group">
    <label for="SocialMedia">Social Media </label>
    <input type="text" name="social_media">
</div>
```

And that the social_media field is added in the grid on the landing page.

▼ Hint

```
Field Name
...
{{mode.field_name }}
```

▼ Solution

```
Social Media
...
{{customer.social_media }}
```

View change

1. Add the code for posting as a Social media text

▼ Hint

Use the request.POST method

▼ Solution

```
social_media=request.POST["social_media"]
```

about:blank 19/21

2. Create a new Customer object using the Customer.objects.create() method

▼ Hint

Add the social_media attribute to the existing Customer.objects.create() method

▼ Solution

Add new interaction channel

This change is only in one place. Can you figure out where this should be?

▼ Hint

In Models file, in the Channel Choices array, add a new entry. The reason this change is only in one place is because in interact.html, we are iterating over possible channels instead of hard coding.

```
('new_choice', 'New Choice'),
```

▼ Solution

```
('social media', 'Social Media'),
```

Test your changes

To apply these model changes, you need to run certain procedures. These procedures will apply the model changes to your database.

▼ Hint

```
# create migrations
# migrate
# run server to test
```

▼ Solution

```
python3.11 manage.py makemigrations customer360
python3.11 manage.py migrate
python3.11 manage.py runserver
```

Launch Customer360

Summary

about:blank 20/21

Congratulations!

You have completed this practice project exercising the skills you learned in Django application development.

Author(s)

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