



# User Manual

## Karmecca CRM

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Version 1.0

December 13, 2019



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## **1. Introduction**

This Customer Relationship Management (CRM) software will transform the way that Karmecca conducts their administrative business. This software will enable administrators to manage accounts and clients in an organized way so that productivity may be maximized. Administrators will be able to manage, add, edit, and delete new accounts as well as export these accounts for use during Karmecca events.

## **2. Quick Guide**

1. As an administrator, I can login to the Web App and navigate the web application.
2. As an administrator, I can export pending or approved applicants onto a spreadsheet.
3. As an administrator, I can filter and search through a list of applications.
4. As an administrator, I can sort through the car applications to see which applications have been approved, denied, accepted, or rejected.
5. As an administrator, I can approve or reject an application.
6. As an administrator I can click on a button on the Accounts page to add an applicant.
7. As an administrator, I can click on a particular application to an email that notifies the applicant of their status.



### 3. Starting the Web Application

#### 3.1 Using Visual Studio Code

This step should only be needed when running Visual Studio Code for the first time. After Visual Studio Code is open, click the “File” button on the top right corner, and click “Open Folder..”. Next, navigate to where the “karmecca-crm2” folder is and click it once. Then hit “Select Folder”.

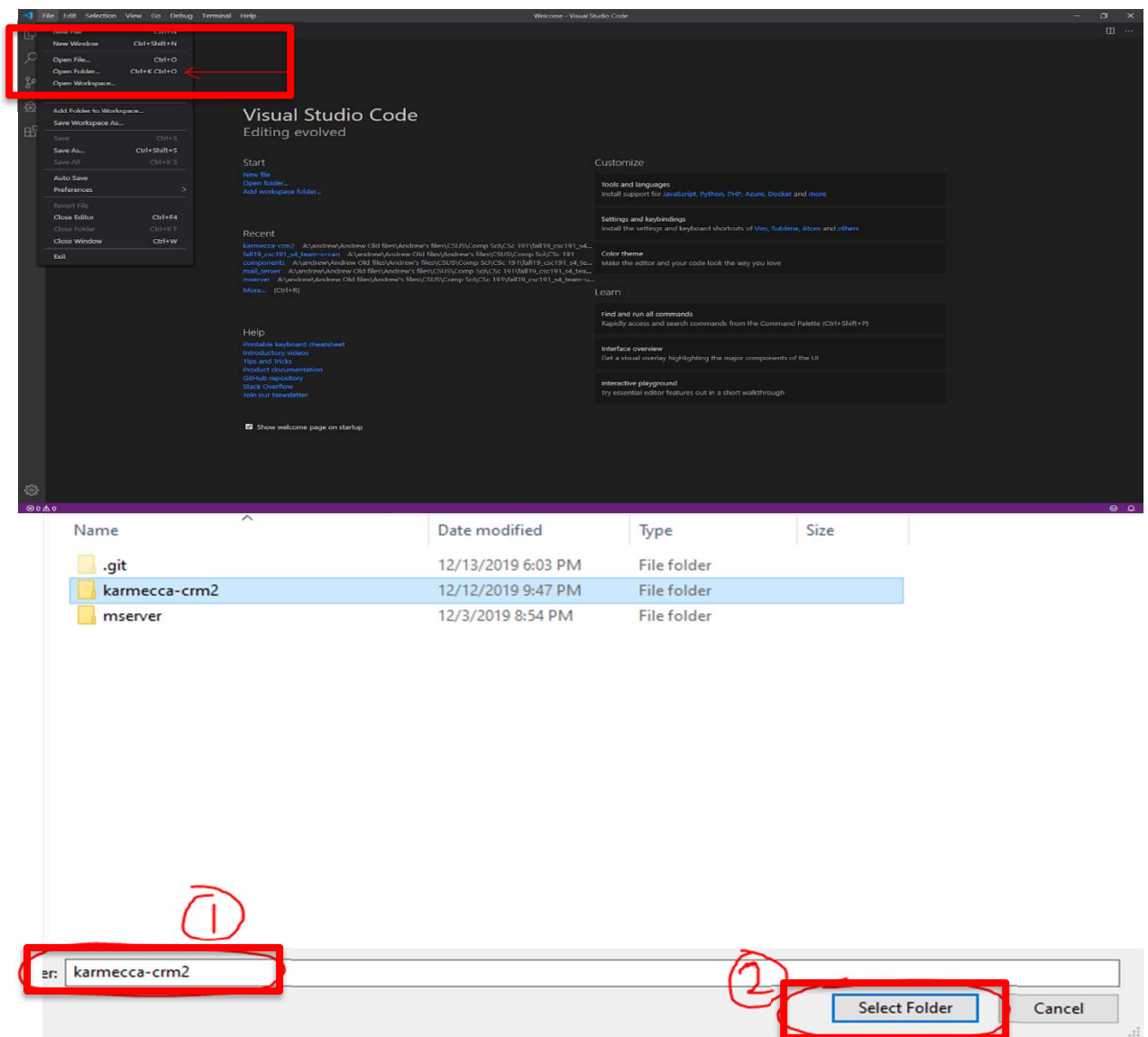
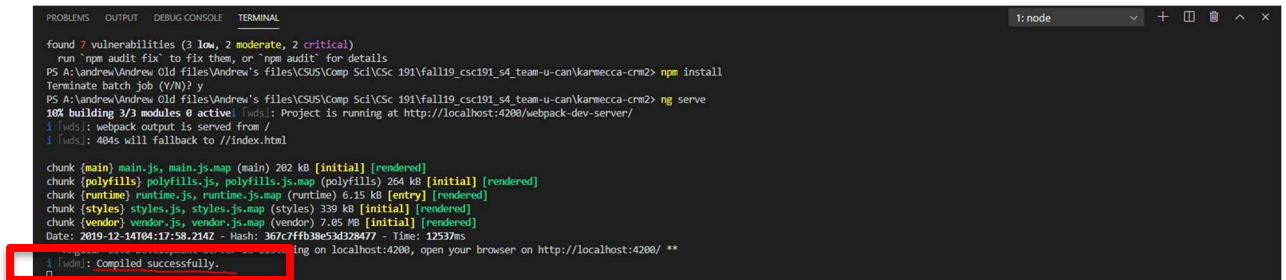


Figure 1: Navigate to File > Open Folder.. > karmecca-crm2 > Select Folder



## 3.2 Run the Web App

Check to make sure the terminal line ends with “karmecca-crm2”. Type “ng serve” after the “>” symbol to run the web page. When the compilation has finished, in the browser, navigate to <http://localhost:4200/>. The first page that will be visible is the Login page.



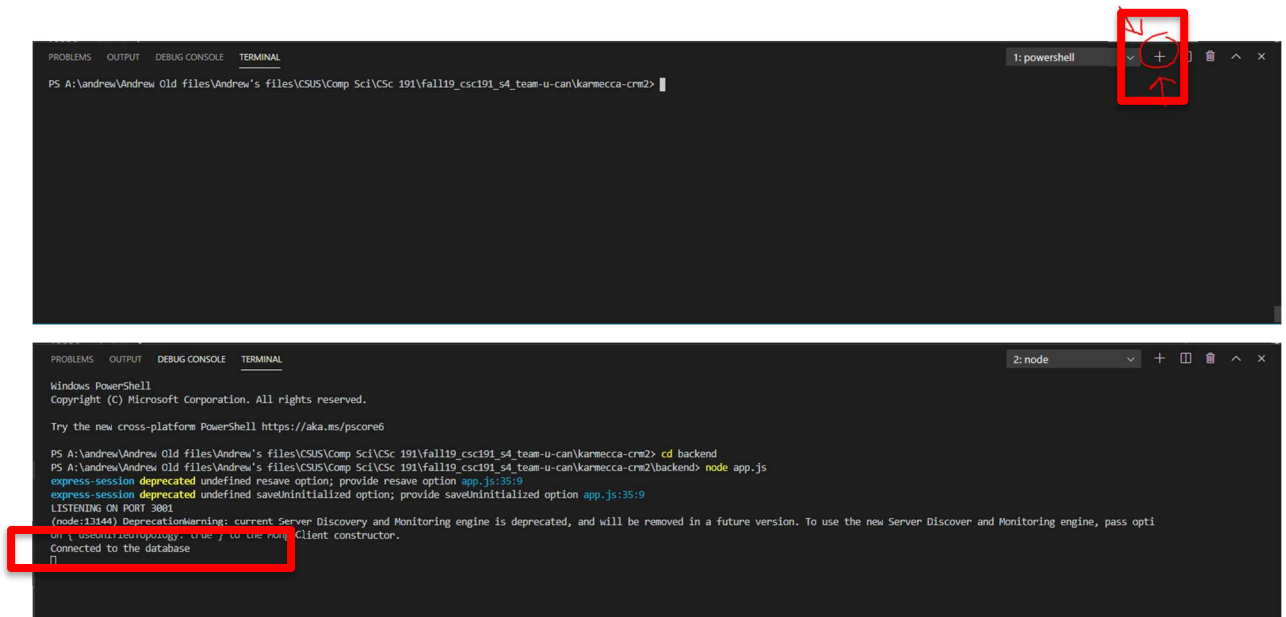
```
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL
found 7 vulnerabilities (3 low, 2 moderate, 2 critical)
run 'npm audit fix' to fix them, or 'npm audit' for details
PS A:\Andrew\Andrew Old files\Andrew's files\CSUS\Comp Sci\CSc 191\Fall19_csc191_s4_team-u-can\karmecca-crm2> npm install
Terminate batch job (Y/N)? y
PS A:\Andrew\Andrew Old files\Andrew's files\CSUS\Comp Sci\CSc 191\Fall19_csc191_s4_team-u-can\karmecca-crm2> ng serve
10% building 3/3 modules 0 active [i] [wds]: Project is running at http://localhost:4200/webpack-dev-server/
1 [wds]: webpack output is served from /
1 [wds]: 404s will fallback to //index.html

chunk (main) main.js, main.js.map (main) 282 kB [initial] [rendered]
chunk (polyfills) polyfills.js, polyfills.js.map (polyfills) 264 kB [initial] [rendered]
chunk (runtime) runtime.js, runtime.js.map (runtime) 6.15 kB [entry] [rendered]
chunk (styles) styles.js, styles.js.map (styles) 339 kB [initial] [rendered]
chunk (vendor) vendor.js, vendor.js.map (vendor) 7.05 MB [initial] [rendered]
Date: 2019-12-14T04:17:58.214Z - Hash: 367c7ffb38e5d328477 - Time: 12537ms
1 [wds]: Compiled successfully.
1 [wds]:
```

Figure 2: After running the “ng serve” command, successful compilation will appear in the terminal.

## 3.3 Connect to the Database

To access the table of applications. Open a new terminal by clicking the + sign in the terminal window on the right. Type “cd backend”. Then type “node app.js”. The terminal should say “Connected to the database”.



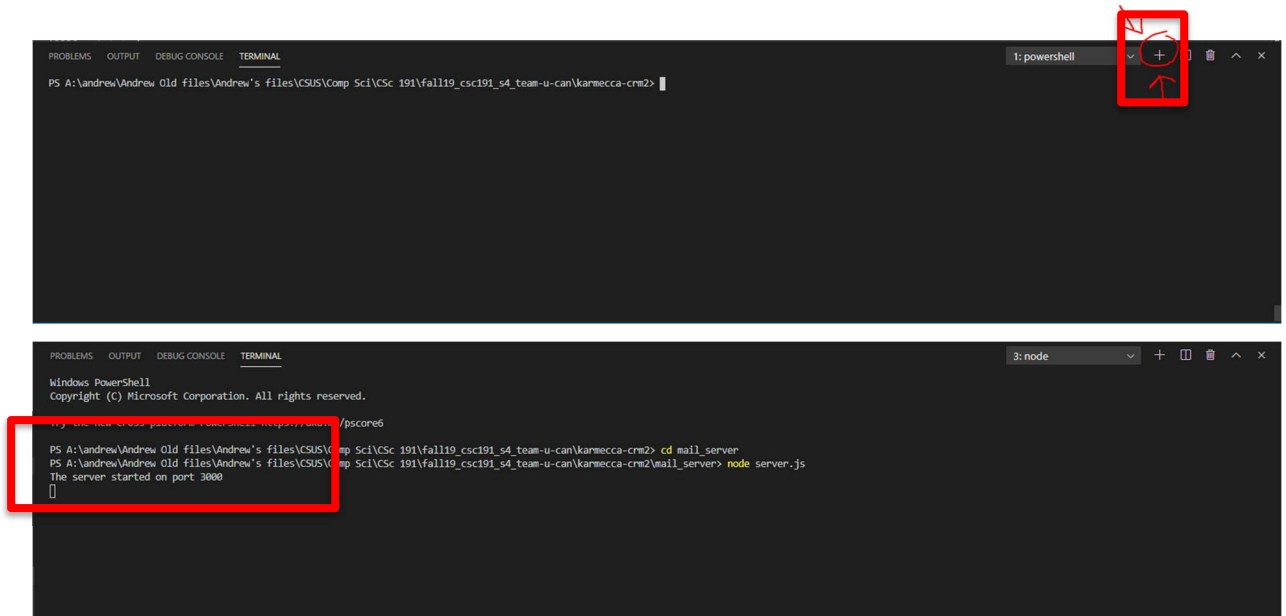
```
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL
PS A:\Andrew\Andrew Old files\Andrew's files\CSUS\Comp Sci\CSc 191\Fall19_csc191_s4_team-u-can\karmecca-crm2> cd backend
PS A:\Andrew\Andrew Old files\Andrew's files\CSUS\Comp Sci\CSc 191\Fall19_csc191_s4_team-u-can\karmecca-crm2\backend> node app.js
express-session deprecated undefined resave option; provide resave option app.js:35:9
express-session deprecated undefined saveinitialized option; provide saveinitialized option app.js:35:9
LISTENING ON PORT 3081
(node:13144) DeprecationWarning: current Server Discovery and Monitoring engine is deprecated, and will be removed in a future version. To use the new Server Discover and Monitoring engine, pass opti
get <useNewUrlParser>: true / to the MongoClient constructor.
Connected to the database
1 [wds]:
```



**Figure 3: Adding another terminal and connecting to the database.**

### 3.4 Run the Mail Server

For there to be a connection between the database and the “Email” icon, the mail server needs to be running. Open a new terminal by clicking the “+” sign in the terminal window on the right. Type “cd mail\_server”. Then type “node server.js”. The terminal should say “The server started on port 3000”.



**Figure 4: Adding another terminal and connecting to the mail server.**

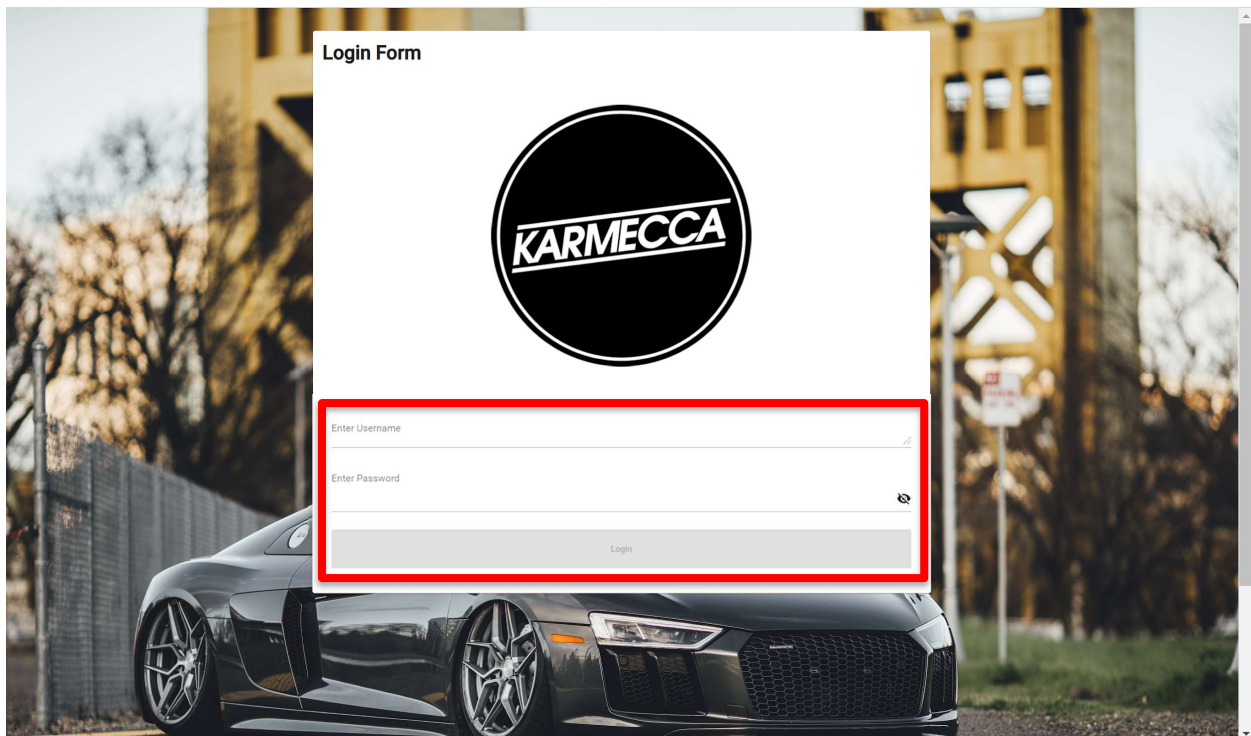




## 4. Authentication

### 4.1 Login

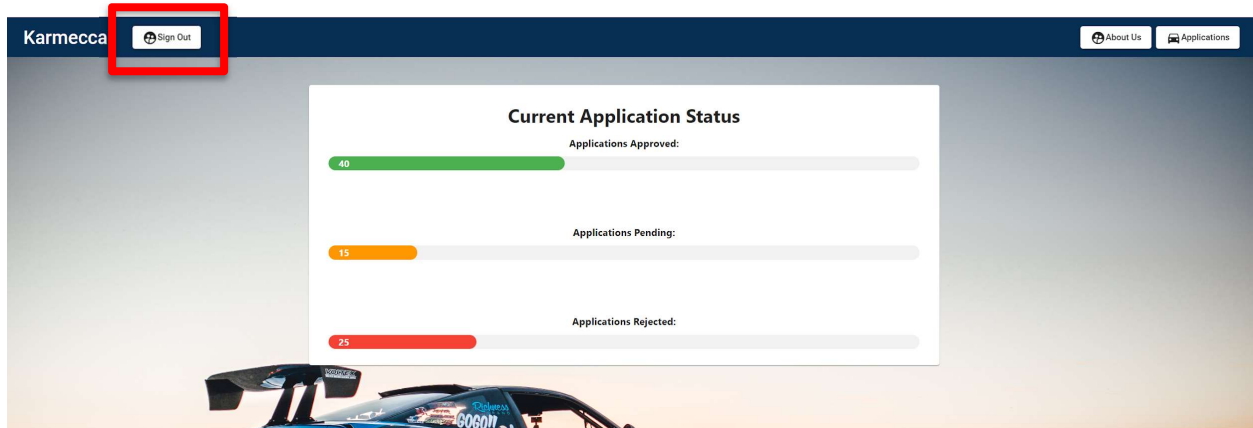
All administrators will need to sign into the Karmecca CRM with a valid username and password for access to client information. The password field is hidden for privacy (see Figure 1) but may be clicked on to verify password spelling.



**Figure 5: Sign in to the Karmecca CRM with a valid username and password. Check password spelling with the “eye icon”.**

### 4.2 Sign out

Once an administrator completes their session, they will be able to sign out of the web application by clicking the appropriate button located on the navigation bar.



**Figure 6: Sign out of the Karmecca CRM by clicking the “Sign Out” button on the navigation bar.**



## 5. Navigating through the Web Application

### 5.1 Navigation Bar

The navigation bar allows an administrator to move from page to page. There are four buttons on the navigation bar that will take an administrator to four different pages. The first is the Karmecca button which will take the administrator to the home page. The “Sign Out” button will return the user to the Login page. The “About Us” button will take the user to the About Us page and the “Applications” button will take them to the Applications page.



Figure 7: The navigation bar, present on all pages.

### 5.2 About Us Page

The About Us page contains the Karmecca mission statement.

### 5.3 Applications Page

The Applications page allows the administrator to manage all the applications and accounts for Karmecca events. This is the page that provides editing, adding, and deleting features for applications. This page will organize all the Karmecca data into one cohesive table.

### 5.4 Home Page

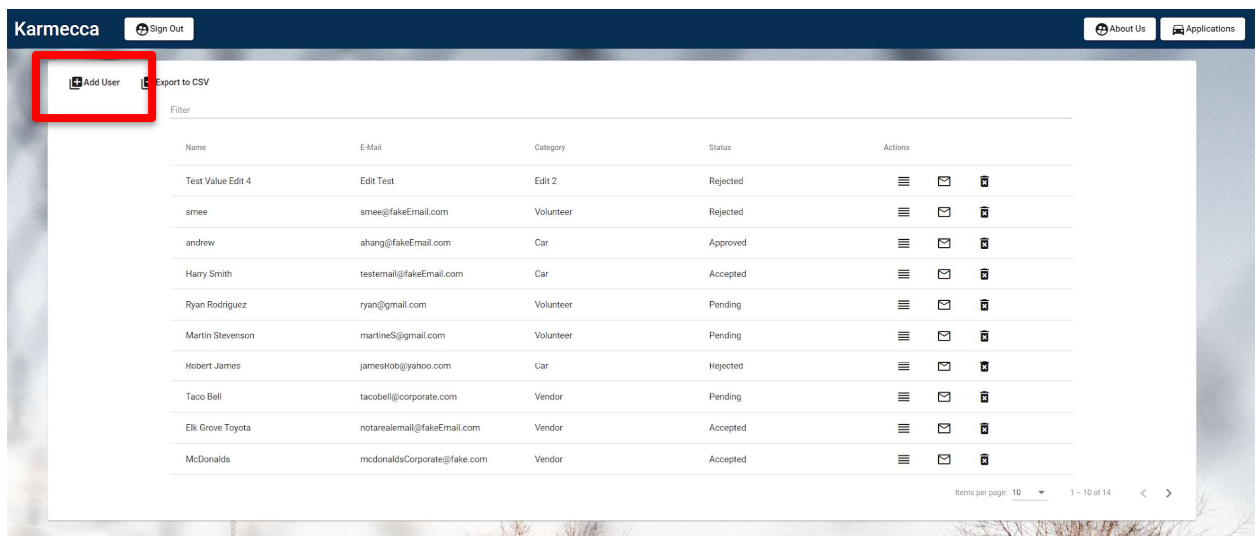
The Home page displays a prototype of a representation of Karmecca data. An administrator would be able to view some fast statistics once they login to the web application.



## 6. Manage Applications

### 6.1 Add an Application

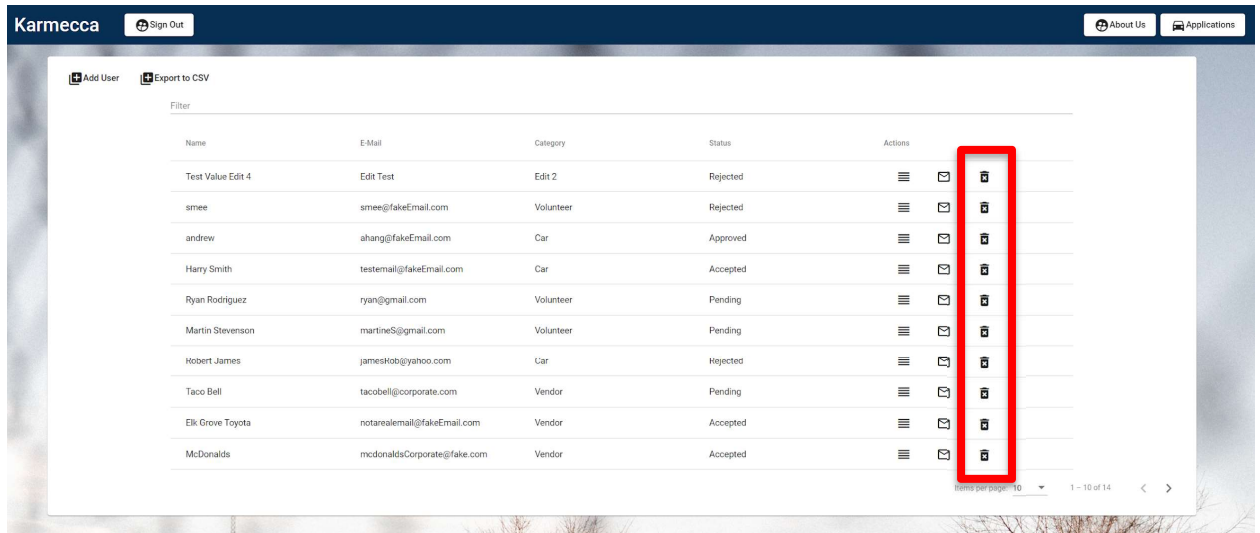
Administrators will need to add additional accounts to the applications table in order to track the amount of attendees to their events. Once on the Applications page, the administrator will need to click the “Add User” button. A new pop up window will appear with fields for the administrator to populate with the appropriate information.



**Figure 8: The “Add User” button permits the administrator to add a new account to the database.**

### 6.2 Delete an Application

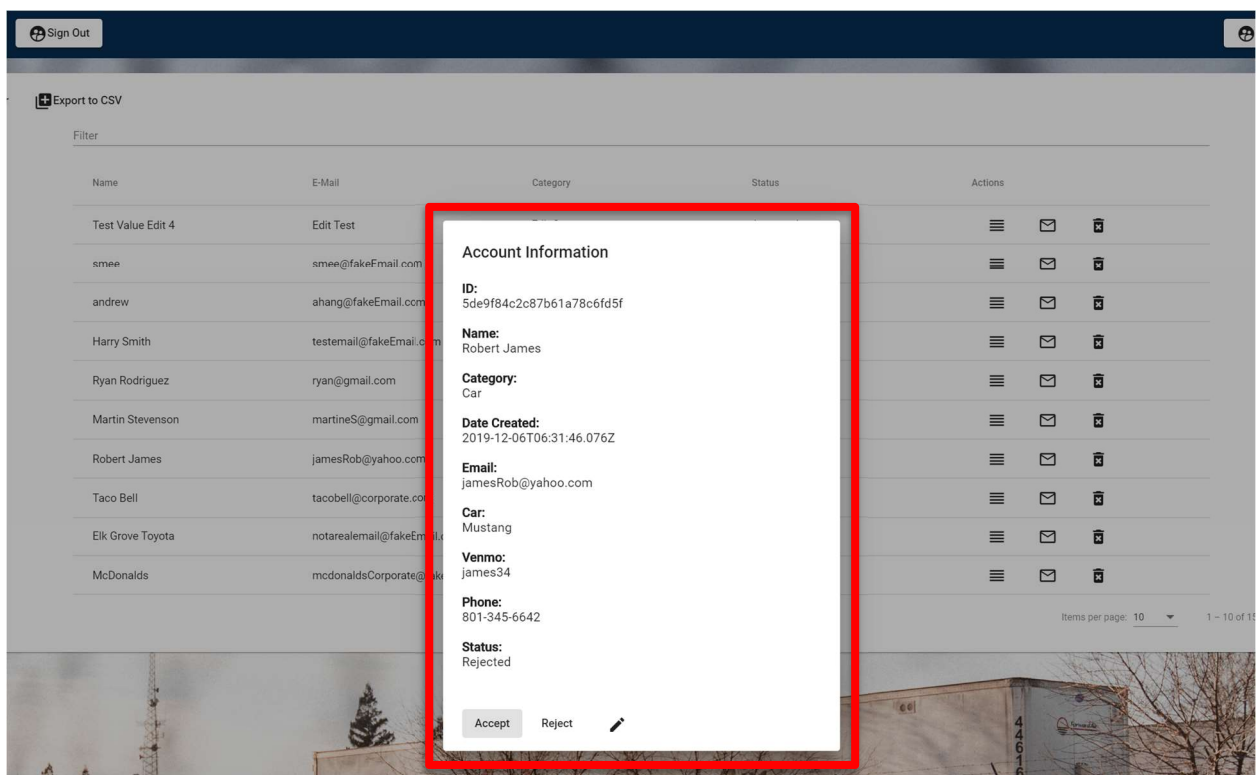
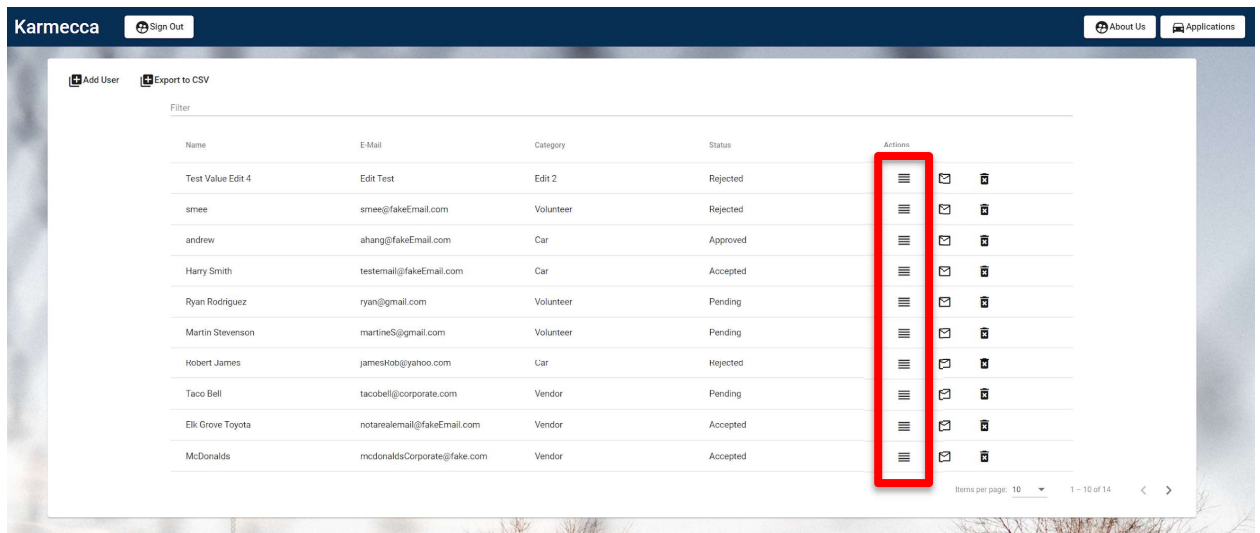
An administrator may need to delete certain accounts that are no longer needed or relevant. This will be accomplished through the Delete icon located on the application table on the Applications page. Once the delete icon is clicked, the administrator will only need to refresh the page to see the changes made. An administrator may make multiple deletes at a time.



**Figure 9: The delete icon will allow an administrator to delete an account.**

### 6.3 View more Application Details

The Applications table displays the most important details for each account; however, it does not display all of the details for each account. In order to view these extra details, an administrator will need to click on the “View More Details” icon. This will bring up a window displaying the complete account information for the selected applicant.

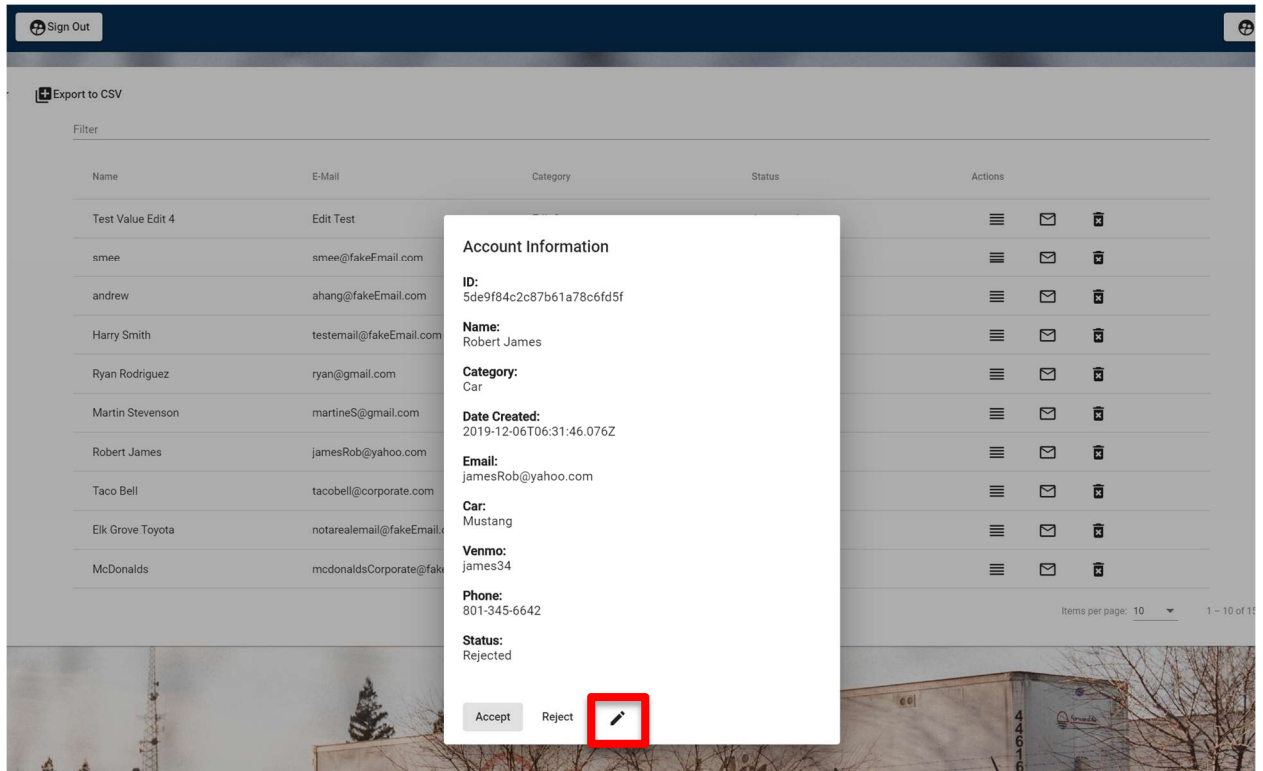


**Figure 10: The administrator will be able to view additional account information by clicking on the “View More Details” icon.**



## 6.4 Edit an Application

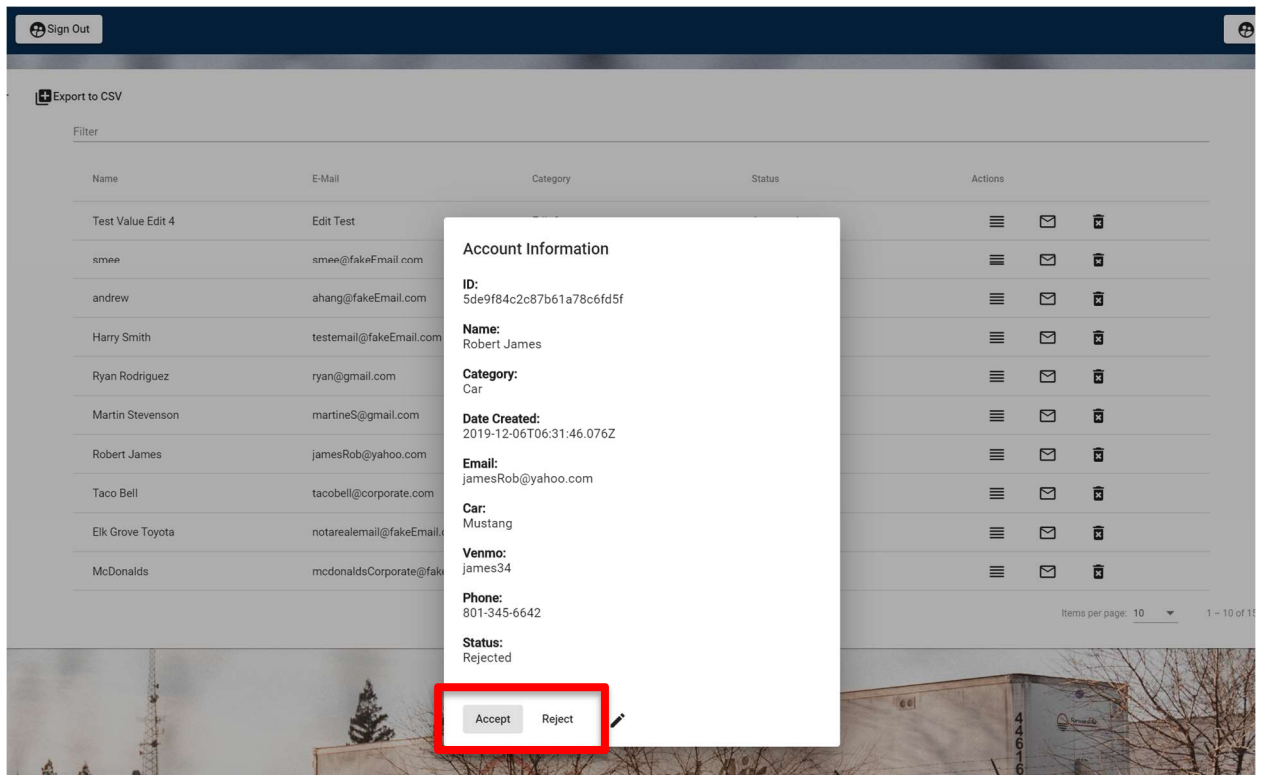
An administrator may need to edit existing accounts located on the Applications page. The “Edit” button is located on the pop up window that is seen after clicking on the “View More Details” icon [see section 6.3]. The administrator will click on the edit button to make changes to a certain account.



**Figure 11: After navigating to the “View More Details” icon, the administrator will see the “Edit” button.**

## 6.5 Accepting and Rejecting Applications

Administrators will receive many applications and need a way to accept and reject certain applicants. An administrator will be able to change the application status by first clicking on the “View More Details” icon [see section 6.3], then selecting either the “Accept” or “Reject” button appropriately. The changes will be visible once the administrator refreshes the page.

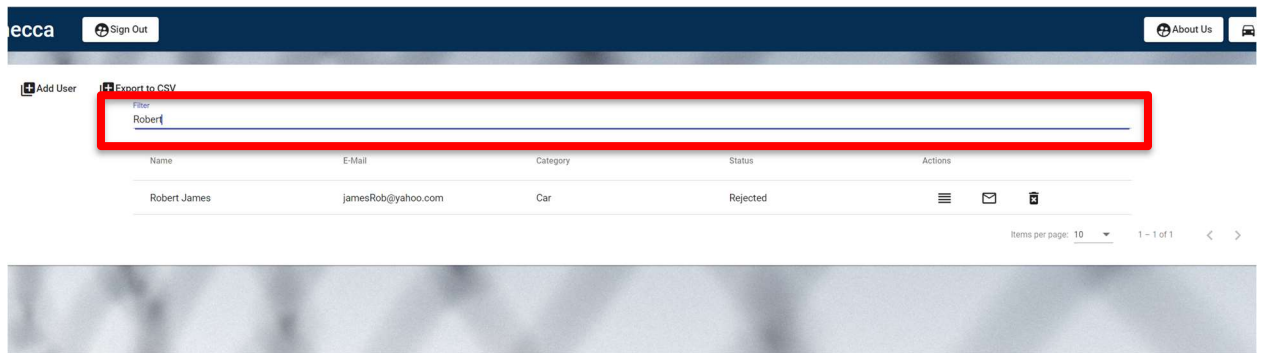


**Figure 12: After navigating to the “View More Details” icon, the administrator will see the “Accept” and “Reject” button.**

## 6.6 Filter Applications

Administrators will need a way to easily manage all of their accounts. To increase efficiency, if an administrator needs a way to search for a particular applicant, they can use the Filter feature. This shall reduce the amount of time spent searching through a long list of applications. The Filter feature is located above the application table on the Applications page. The administrator will be able to enter a keyword into the filter field that they would like to search for and the table will display the desired results.

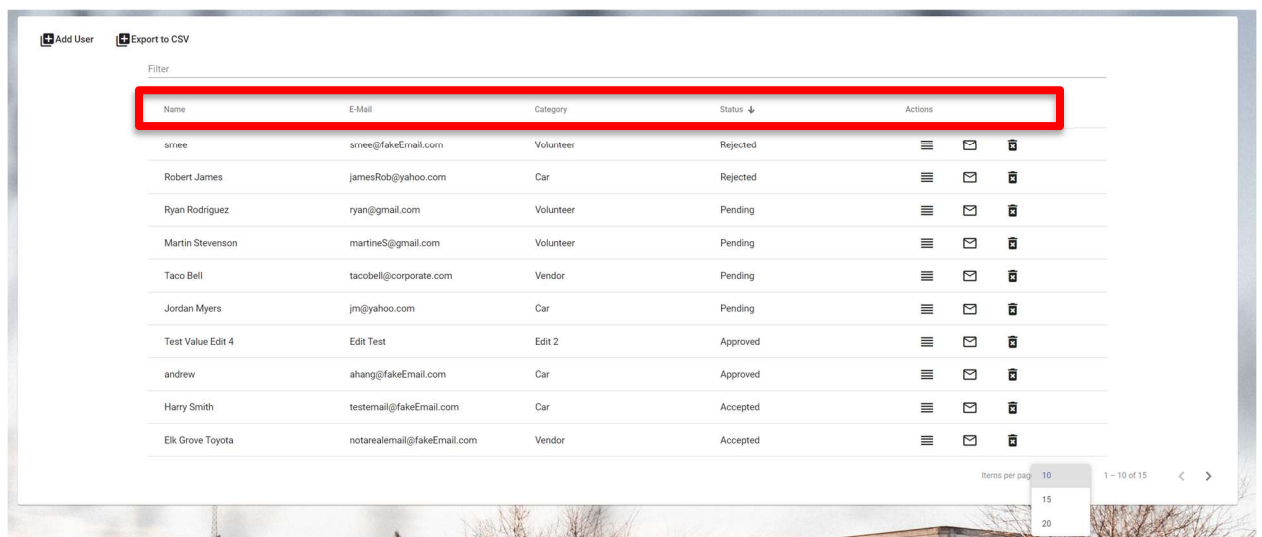




**Figure 13: An administrator shall enter a keyword to limit the results displayed in the table.**

## 6.7 Sort Applications

Administrators will need a way to easily manage all of their accounts. In order to bring organization to the table, every column header is sortable. The table will alter the displayed results to match the sorting for whatever column the administrator selected. This will allow the administrator to easily organize their accounts based on a certain column header. To sort a certain column in the table, the administrator will only need to click on the desired column header. Clicking on the same header twice in a row will change the sorting from ascending to descending and vice versa.

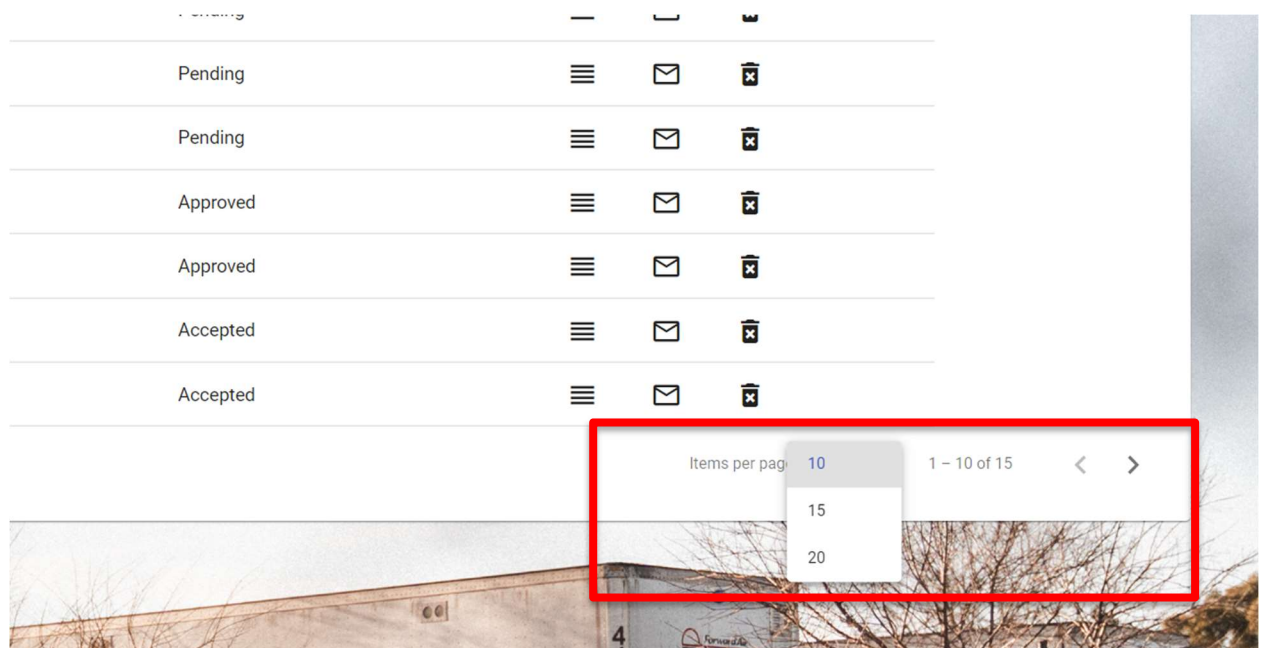




**Figure 14: The administrator may select a column header to sort the table by clicking on the column header itself.**

## 6.8 Pagination

Administrators will need a way to easily manage all of their accounts. Instead of scrolling through a long list of applications on a single page, the administrator will be able to use pagination. The pagination feature is displayed at the bottom of the application table on the Application page. The administrator will be able to select how many applications they would like to view per page and scroll appropriately through the number of pages.



**Figure 15: The administrator may select how many applications to view per page.**



## 7. Exporting Applications

An administrator may need to export the table of applications for use at Karmecca events. This will give the administrator access to a physical copy if needed. The administrator will navigate to the Applications page [see section 5.3]. Once on the page, the administrator will see an “Export” button above the table. The administrator will click this button to export the table to a spreadsheet.

The screenshot shows the Karmecca CRM interface. At the top, there's a navigation bar with 'Karmecca', 'Sign Out', 'About Us', and 'Applications' links. Below the navigation bar, there's a toolbar with 'Add User' and 'Export to CSV' buttons. The 'Export to CSV' button is highlighted with a red rectangle. Below the toolbar is a table of applications. The table has columns for Name, E-Mail, Category, Status, and Actions. The table contains 10 rows of data. At the bottom of the table, there's a pagination control showing 'Items per page: 10' and '1 - 10 of 15'.

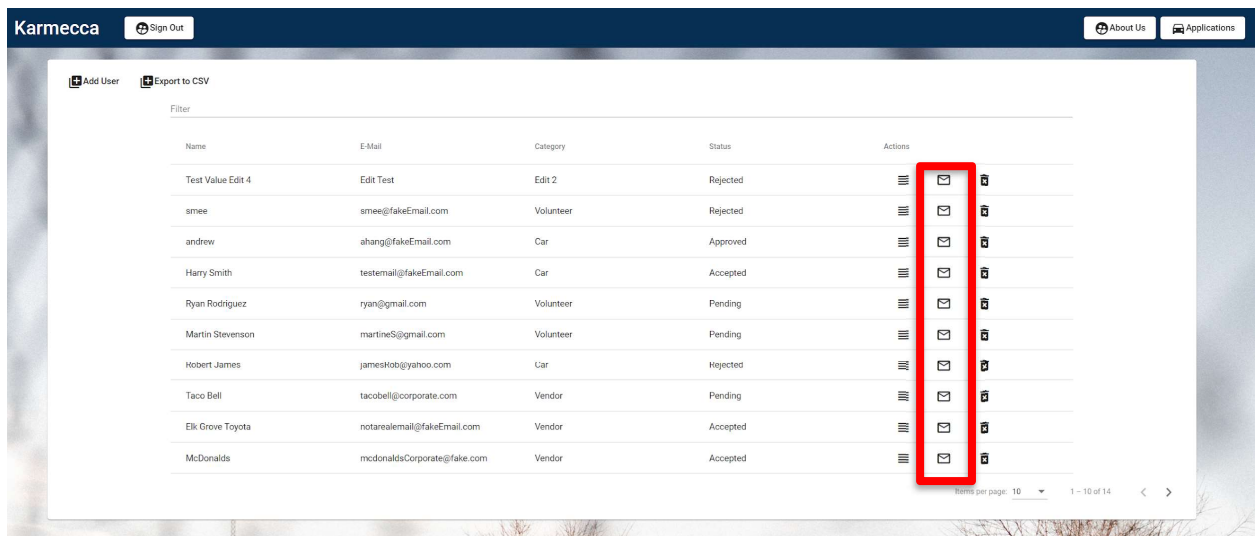
Name	E-Mail	Category	Status	Actions
smee	smee@fakeEmail.com	Volunteer	Rejected	[Menu] [Email] [Download]
Robert James	jamesRob@yahoo.com	Car	Rejected	[Menu] [Email] [Download]
Ryan Rodriguez	ryan@gmail.com	Volunteer	Pending	[Menu] [Email] [Download]
Martin Stevenson	martine@gmail.com	Volunteer	Pending	[Menu] [Email] [Download]
Taco Bell	tacobell@corporate.com	Vendor	Pending	[Menu] [Email] [Download]
Jordan Myers	jm@yahoo.com	Car	Pending	[Menu] [Email] [Download]
Test Value Edit 4	Edit Test	Edit 2	Approved	[Menu] [Email] [Download]
andrew	ahang@fakeEmail.com	Car	Approved	[Menu] [Email] [Download]
Harry Smith	testemail@fakeEmail.com	Car	Accepted	[Menu] [Email] [Download]
Elk Grove Toyota	notarealemail@fakeEmail.com	Vendor	Accepted	[Menu] [Email] [Download]

**Figure 16: The administrator may export the applications table to a spreadsheet by clicking the “Export” button.**



## 8. Automatic Email

Administrators will need to update their applicants on the status of their applications. Administrators may use the automatic “Email” icon located on the applications page to send a pre-formed email to that certain account. Once an applicant’s status has been approved, the administrator will have a fast and simple way to deliver email confirmations.



**Figure 17: An administrator may click on the “Email” icon to deliver a pre-formed email to that applicant.**



## Contact Information

Name	Email	Phone Number
Parker Martinez	parkermartinez@csus.edu	916-889-3333
Jay Yang	Jayyang1994@gmail.com	916-917-6041
Aaron Cheung	aaroncheung@csus.edu	209-597-0817
Matthew Geobel	Schnee782@gmail.com	757-576-7317
Phu Ho	phuhoangho@csus.edu	916-397-4140
Andrew Hang	andrew.hann@yahoo.com	916-397-0760
An Lam	anlam@csus.edu	916-600-4375

Table 1: Contact Information