

TransCompany

CRM system requirements

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Introduction

- **Company activity**

- Trucking
 - Shipment

- **Target audience**

- People
 - Companies
 - Organizations
 - Which needing in trucking or shipment

- **Developed system appoinment**

- To make shipment ordering easier to customers ,
 - and to make company management more accurate

General requiremets

- **Project description**

The project goal is to develop CRM (Customer Relationship Management) system for trucking and shipment company named TransCompany. The system goal is dscribed in “Introduction” part.

The system will be a website with the specific functions described in “Basic functionality” part.

- **Required technologies**

Website must support and be tested on browser: Google Chrome on OS X operating system.

Website and all required implementation files must be optimized for Java SDK 1.8, Spring 4.0.8, Hibernate 4.3.0, and PostgreSQL.

External library dependency management must be handled with Maven 4.0.0.

General requirements

- **Security requirements**

To protect information from unwarranted access and modifying, website must contain authentication procedure and implement a system of access roles. These roles are specified in “Basic functionality part”.

Unauthorized users are redirected to welcome page, and can register as Customers, or Log in.

- **Design requirements**

Appearance of the CRM system must be identical across all pages according to the style specifications in this document in “Templates” part.

Website must be adapted for the browser window resolution no less than 800 * 600

There is NO requirement to make the system responsive for small screens.

Basic functionality

- **User roles and functions**

There are three specified user roles:

Admin - the company manager.

Admin can view

“Customers”, “Orders”, “Applications”, “Cars”, “Drivers”, “Messages” pages. And users with this role can add new Cars and register new Drivers.

Admins cannot be registered. They must be already registered when CRM is completed.

Driver - the company driver.

Driver can view

“My orders”, “Applications”, “Cars” pages.

Users with this role can take the Applications and Complete the orders.

Drivers are registered by Admin.

Customer - the company customer.

Customer can view

“Drivers”, “Cars” pages.

Users with this role can create an Application for trucking.

Customer can register itself at the registration page.

Also unauthorized users can view “Login”, “Registration”.

All user can view “Dashboard” page with some information and from to contact with admins. This is the main page.

User roles cannot be changed.

Basic functionality

- **Pages and their functions**

There are three three groups of pages:

Pages with table

Pages with form

And Main page

Main page is the page all users can view

it contains the header with widgets counting Customers, Drivers, Cars and Applications.

and the from to contact the admins.

Pages with table : Orders, Customers, Drivers, Cars, Applications, Messages.

This pages contain a table with appropriate database table content.

This content may vary depending on user Role:

Admin on orders page can view all orders, but drivers on this page can view only him orders.

On Cars pages must be an search field where users can search a car by mdoel name.

On Orders pages there are additional buttons for driver where they can mark orders as Completed.

On Applications pages there are additional select field and button for drivers whereby hey can take an Application.

After taking the application is delete and new orders is added

Pages with form: Registration , Log in, Add new Car, New Application, Register new Driver.

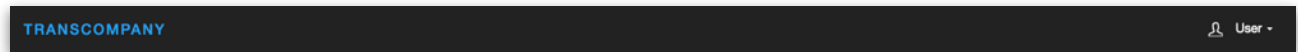
This pages contains a specific form to create new records in database , or change existing records.

Pages template are described in “Templates” part.

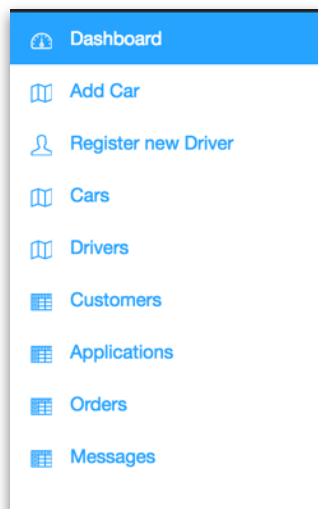
Templates

- **Navbar template**

Nav bar contains of two parts:
header:



sidebar:



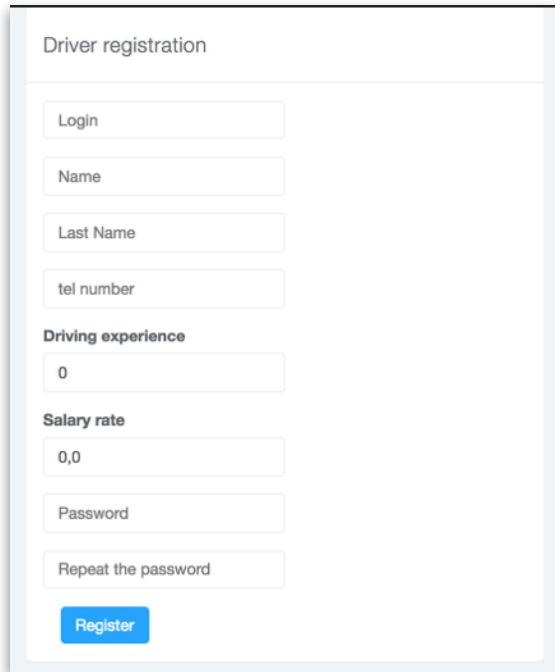
Header content is static for all pages.

Sidebar content may vary depending on user Role according to
“Basic functionality” part.

Templates

- **Form pages template**

there is general style for all form on pages:

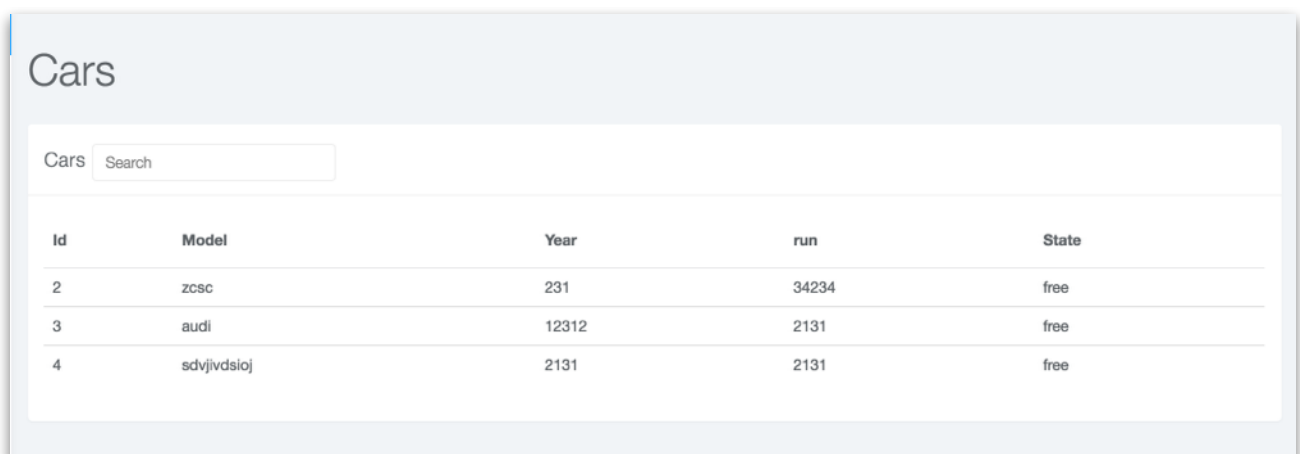


A screenshot of a 'Driver registration' form. It features a title 'Driver registration' at the top. Below the title are several input fields: 'Login', 'Name', 'Last Name', and 'tel number'. These are followed by a section titled 'Driving experience' with an input field containing '0'. Next is a section titled 'Salary rate' with an input field containing '0,0'. Below these are 'Password' and 'Repeat the password' fields. At the bottom is a blue 'Register' button.

The form content may vary depending on form appointment.

- **Table pages template**

There is a general template for all table pages:



A screenshot of a 'Cars' table page. The page has a header 'Cars' and a search bar. Below the search bar is a table with 5 columns: 'Id', 'Model', 'Year', 'run', and 'State'. The table contains 3 rows of data.

Id	Model	Year	run	State
2	zcsc	231	34234	free
3	audi	12312	2131	free
4	sdvjivdsloj	2131	2131	free

Table header and content is varying depending on page header and content in database.