**PROJECT TITLE**: CRM PROJECT USING DJANGO

DOCUMENTATION FOR INSTALLATION AND PROCESS FLOW OF PROJECT

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**Overview:**

Creating a customer relationship project using Django and MySQL involves creating login page that has a features of adding information of customer and saved in databases and can be manipulate recorded data as add, delete and update operations in server page then again it will be updated in database table of the MySQL software.

**PREREQUISITES:**

Front End : HTML, BOOTSTRAP

Back end : Django Framework.

Database : MYSQL.

**SOFTWARE INSTALLED FOR PROJECT:**

1. GIT version 2.43.0.windows.1

[https://www.git-scm.com/download/win](file:///C:\Users\Vetri\Desktop\GGH.docx)

1. MICROSOFT VISUAL STUDIO CODE version 1.85.1

[https://code.visualstudio.com/download](file:///C:\Users\Vetri\Desktop\GGH.docx)

1. MYSQL WORKBENCH version 8.0.3.4

[https://dev.mysql.com/downloads/installer/](file:///C:\Users\Vetri\Desktop\GGH.docx)

**PROCESS FLOW:**

**GITHUB:**

Using git bash software , I have cloned the project and stored in a local system.

The command used was,

CD “C:\Users\Vetri\Desktop\pro”

GIT CLONE “[https://github.com/flatplanet/Django-CRM.git](file:///C:\Users\Vetri\Desktop\GGH.docx)”

Dir command

**MICROSOFT VISUAL STUDIO:**

Open the project folder in Microsoft visual studio code

(File →open folder). Packages need to be installed in visual studio code for the CRM project using django and MySQL are,

* pip install django (django version 3.2)
* pip install mysql
* pip install mysql-connector
* pip install mysql-connector-python
* pip install mysql connector

These packages to be run in terminal of visual studio code.

**Connecting existing project to my database:**

In **settings.py,**

DATABASES = {

'default': {

'ENGINE': 'django.db.backends.mysql',

'NAME': **'elderco'**,

'USER': 'root',

'PASSWORD': '1234', # **we want to change the password in project as mysql local host password**

'HOST': 'localhost',

'PORT': '3306',

}

}

In **mydb.py** file,

import mysql.connector

dataBase = mysql.connector.connect(

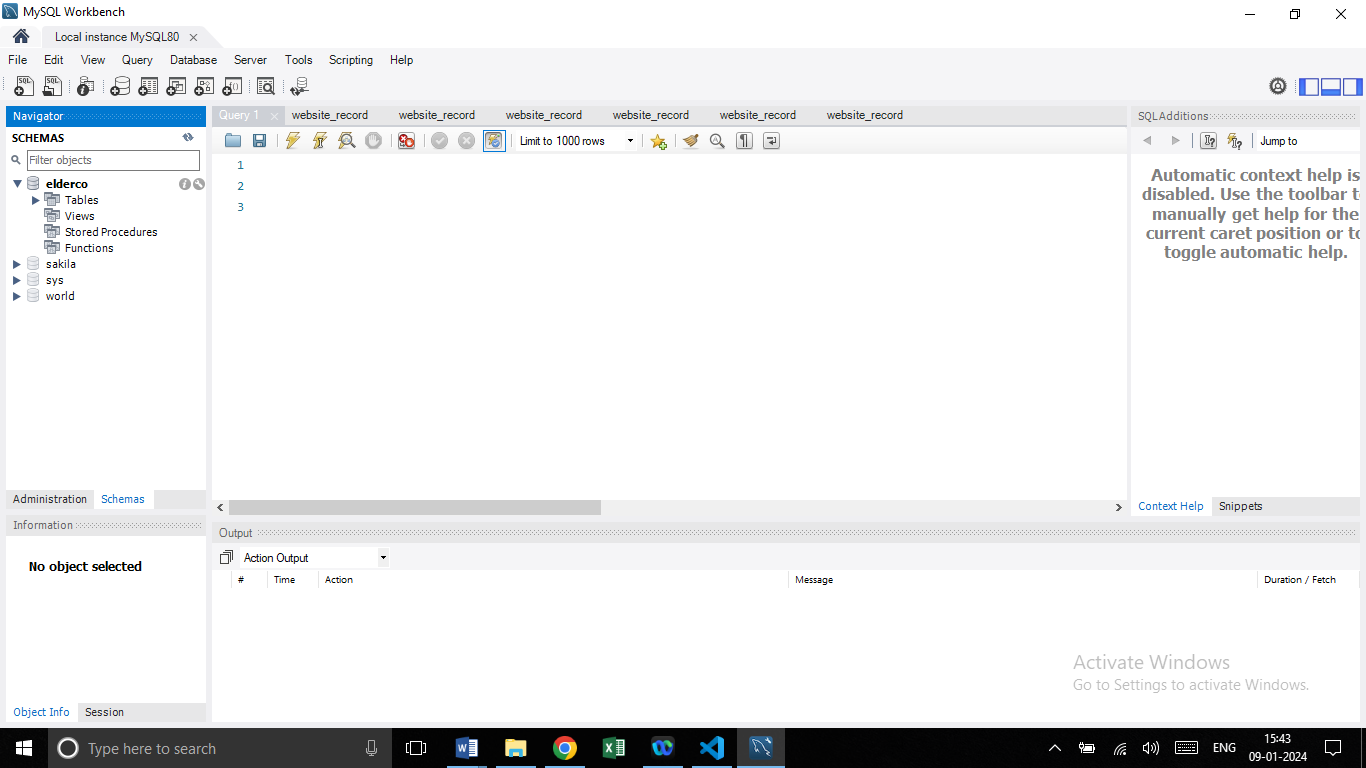
host = 'localhost',

user = 'root',

passwd = '1234' # **we want to change the password in project as mysql local host password**

)

after that we want to use a command **python mydb.py** to connect to database .Once it run ,we can check by opening the mysql software and refresh there will be a project name of schema  **elderco** shown in a mysql database,



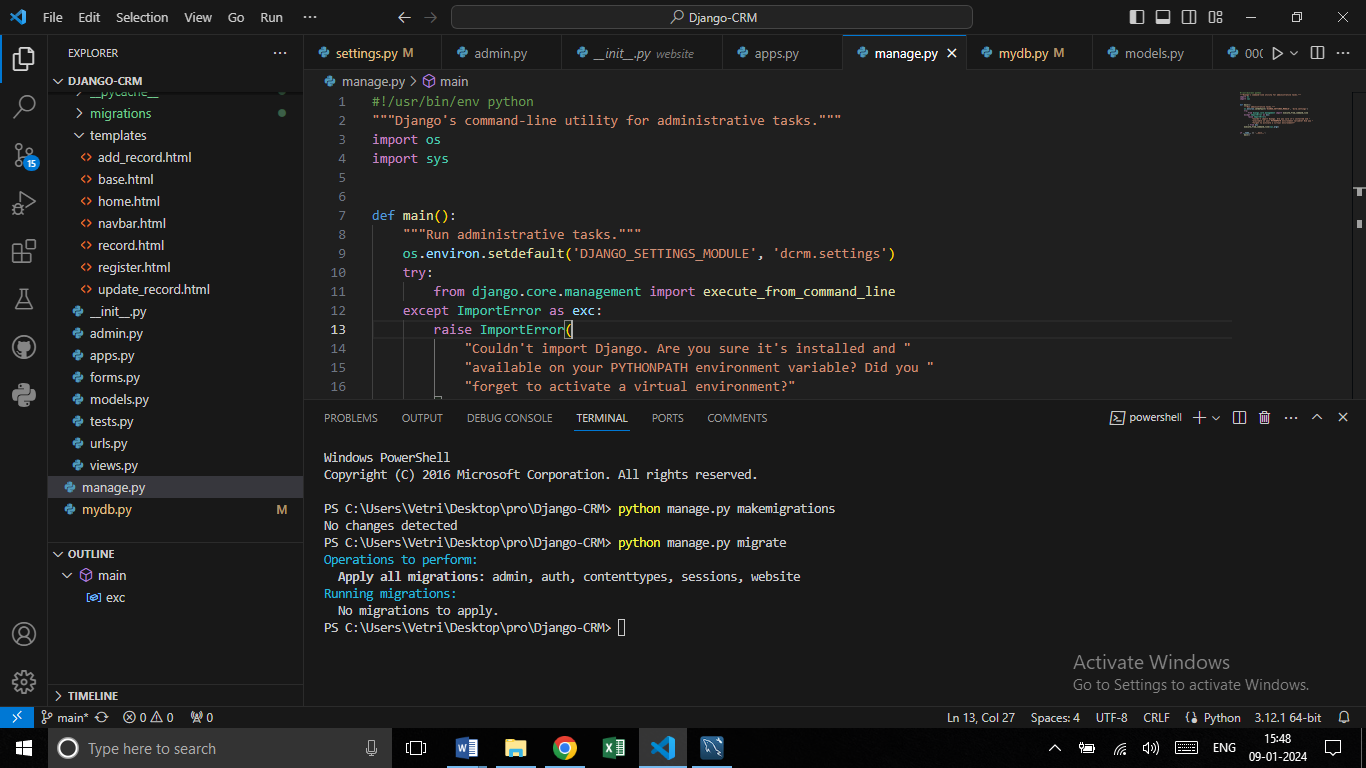
After that run the command,

**Python manage.py makemigrations**

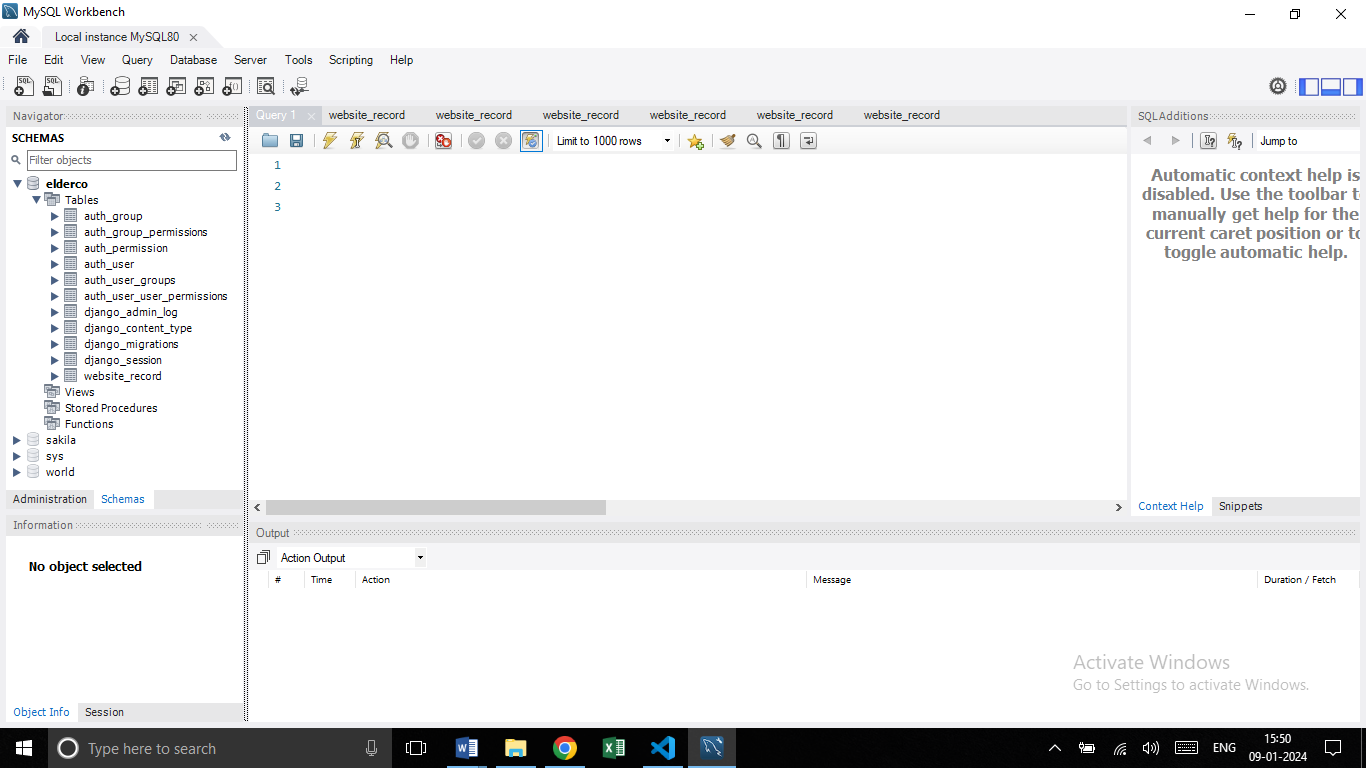
**Python manage.py migrate**

migrate, which is responsible for applying and unapplying migrations.

makemigrations, which is responsible for creating new migrations based on the changes you have made to your models.



In Mysql workbench, django migrations and tables are created.



**Creating an Admin User:**

In Django, you can create an admin user using the ‘**createsuperuser’** management command. This user will have access to the Django admin interface and can manage various aspects of your Django project through it.

1. Open a terminal of visual studio code

2. Run the following command:

**python manage.py createsuperuser**

3. You will be prompted to enter a username, email address, and password for the new superuser.

Username: vetri

Email address: senthamizhmechanical@example.com

Password: \*\*\*\*

Password (again): \*\*\*\*\*\*\*\*

After entering details correctly, it shown as **‘Superuser created successfully’**.

**To run a django server:**

Start the development server using **python manage.py runserver**

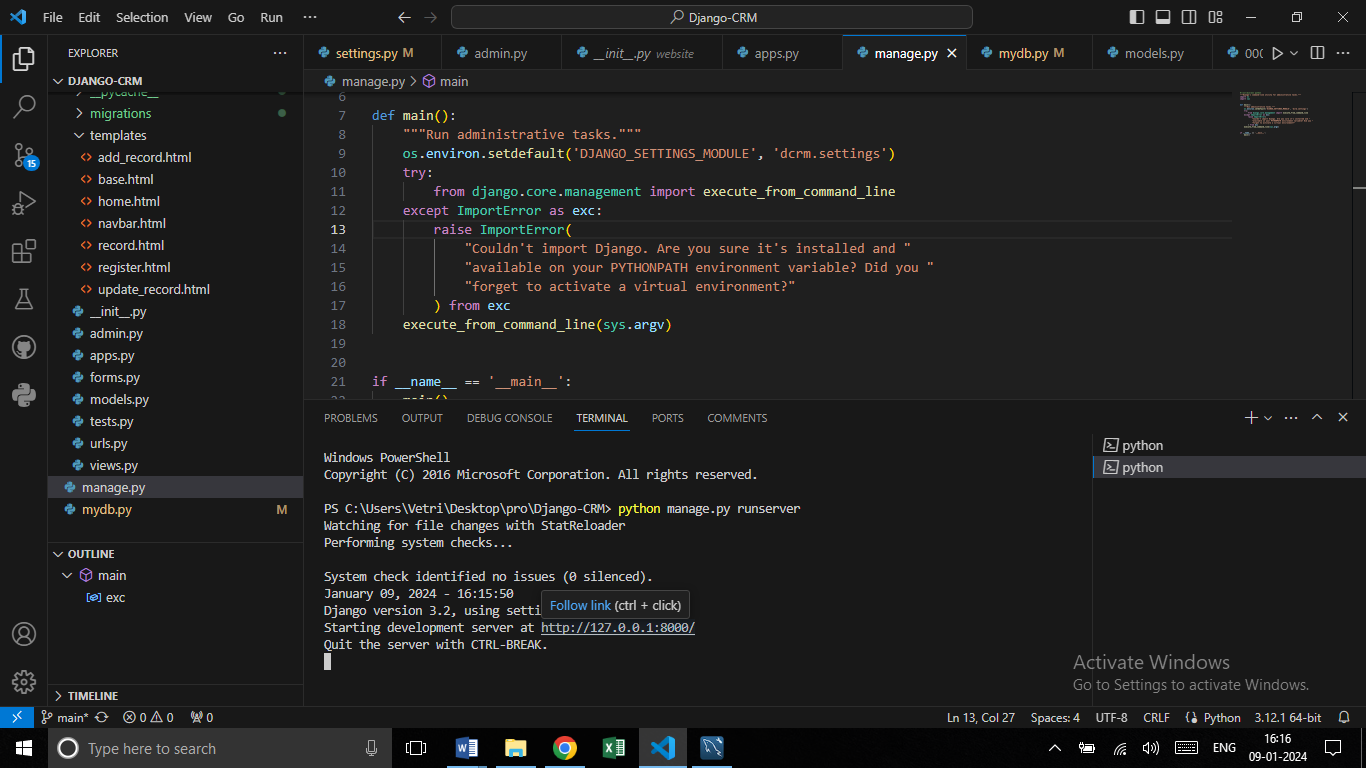
**Terminal shown as**

System check identified no issues (0 silenced).

January 09, 2024 - 16:14:22

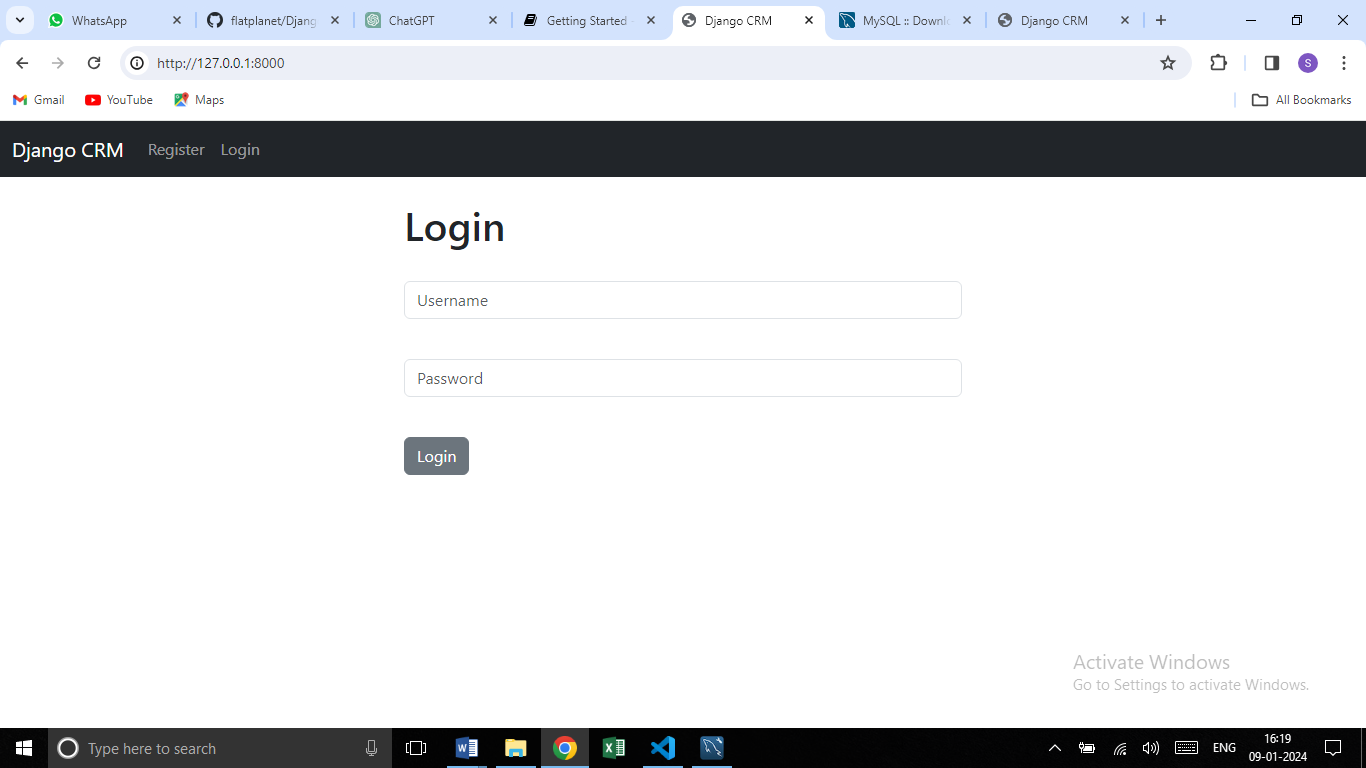
Django version 3.2, using settings 'dcrm.settings'

Starting development server at <http://127.0.0.1:8000/>



Open your web browser and paste[**http://127.0.0.1:8000/**](http://127.0.0.1:8000/)

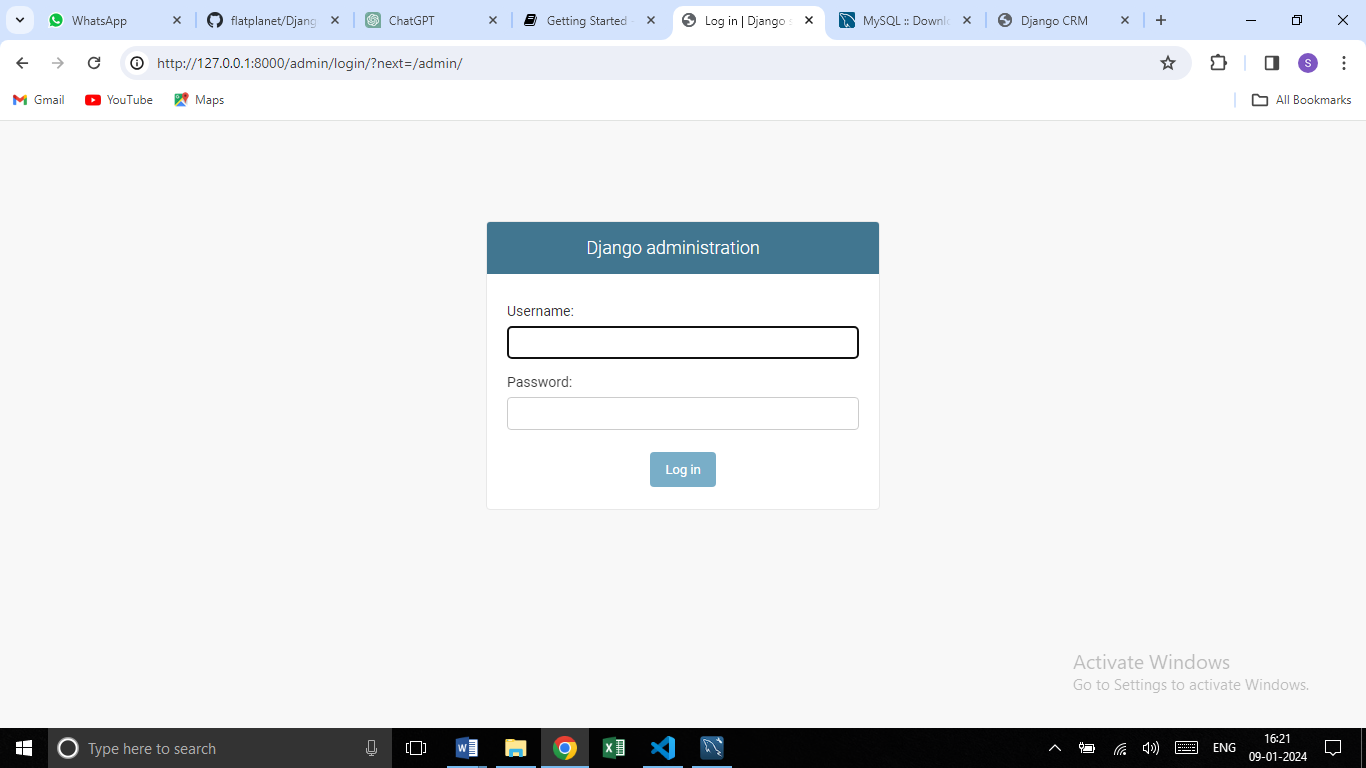
The django server page runs

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**For admin page run:**

Open your web browser and run [http://127.0.0.1:8000/admin/](file:///C:\Users\Vetri\Desktop\GGH.docx)

The django admin page runs



**Features of project:**

1. Lead Generation:

Identify potential customers or leads through various channels such as marketing campaigns, social media, website visits, or referrals.

2. Customer Data Collection:

Gather and consolidate customer data from various sources, including lead forms, interactions, and external databases. And store it in databases we can update, delete and add data.

Populate the CRM system with accurate and up-to-date customer information.

3. Customer Segmentation:

Categorize customers into segments based on characteristics, behaviours, or demographics.

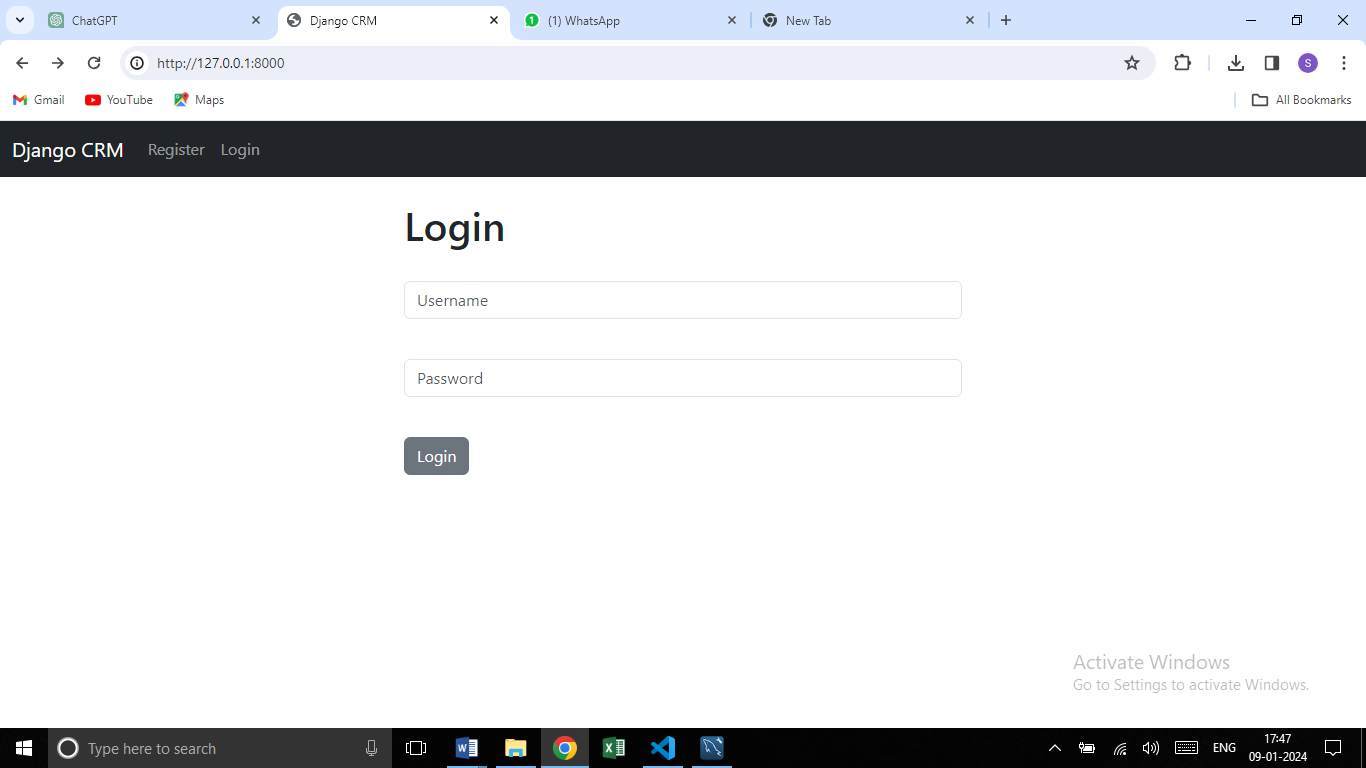
Provide relevant and personalized content to nurture relationships.

4. Sales Opportunity Identification:

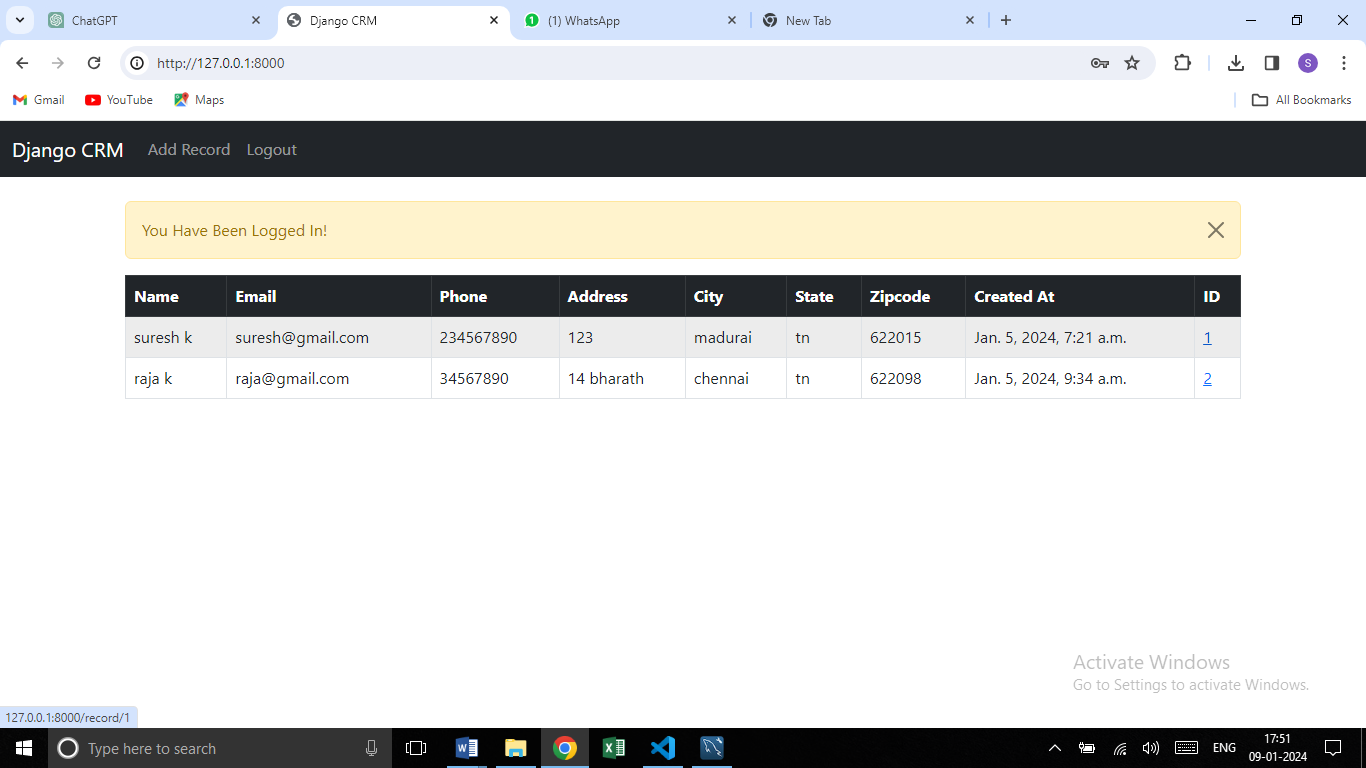
Identify potential sales opportunities during customer interactions.

Evaluate the needs and requirements of customers that align with the products or services offered.

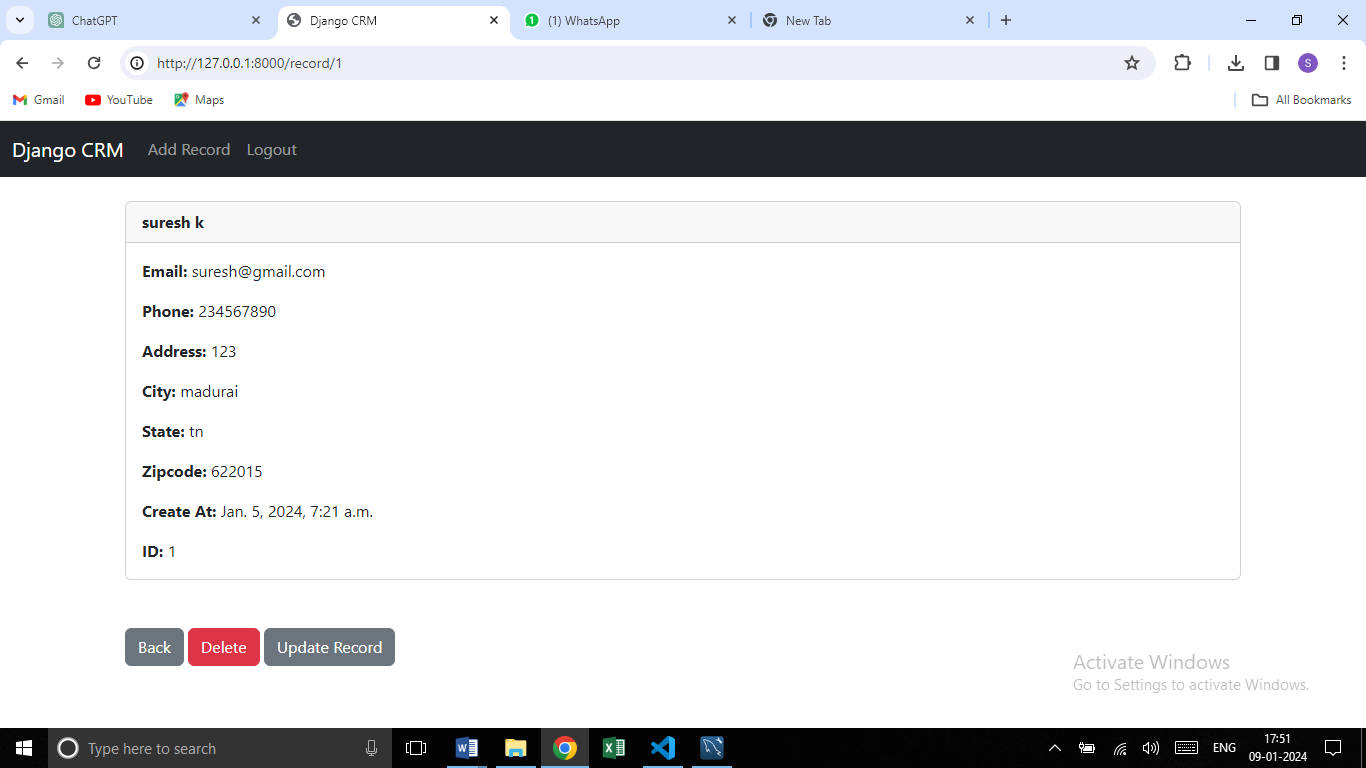
Website has a navigation bar consist of Register and login and has a login page in it.

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**Once log in, already entered customer details shown.**

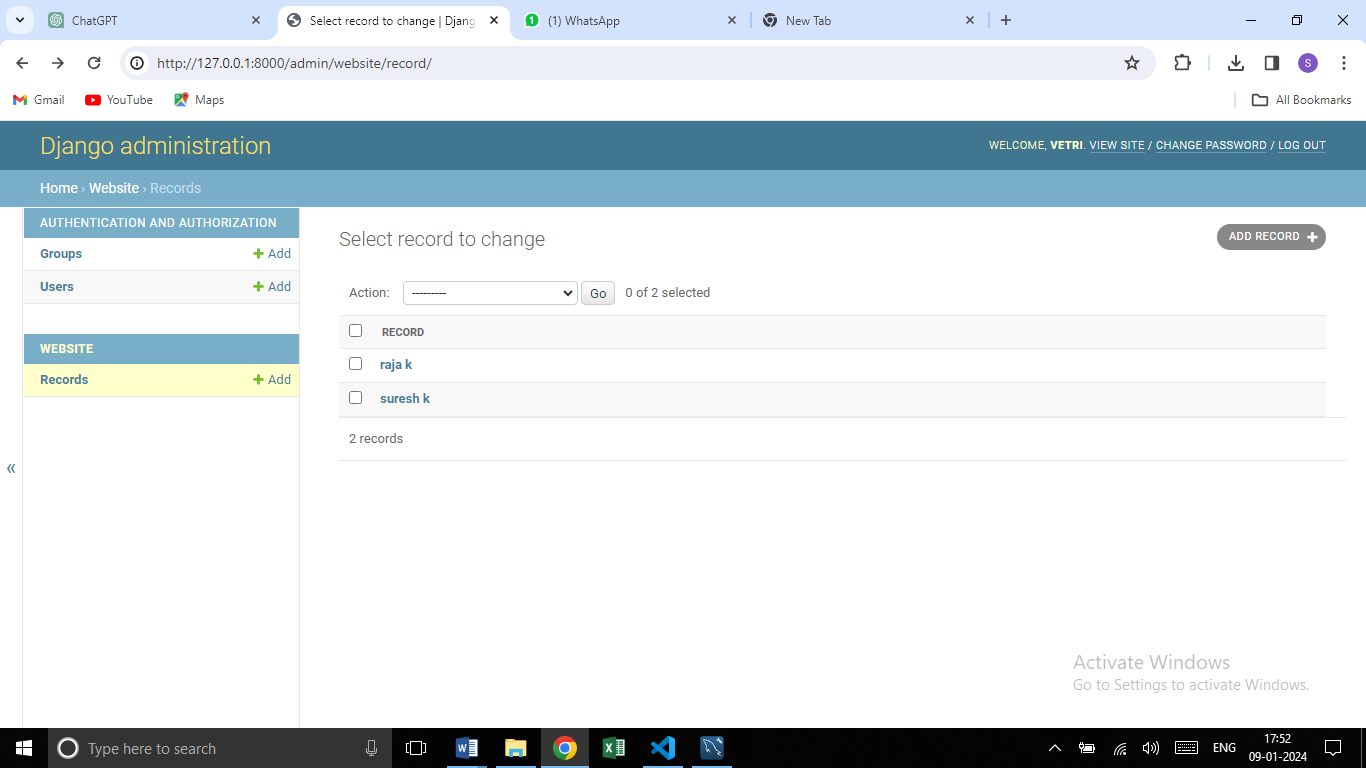
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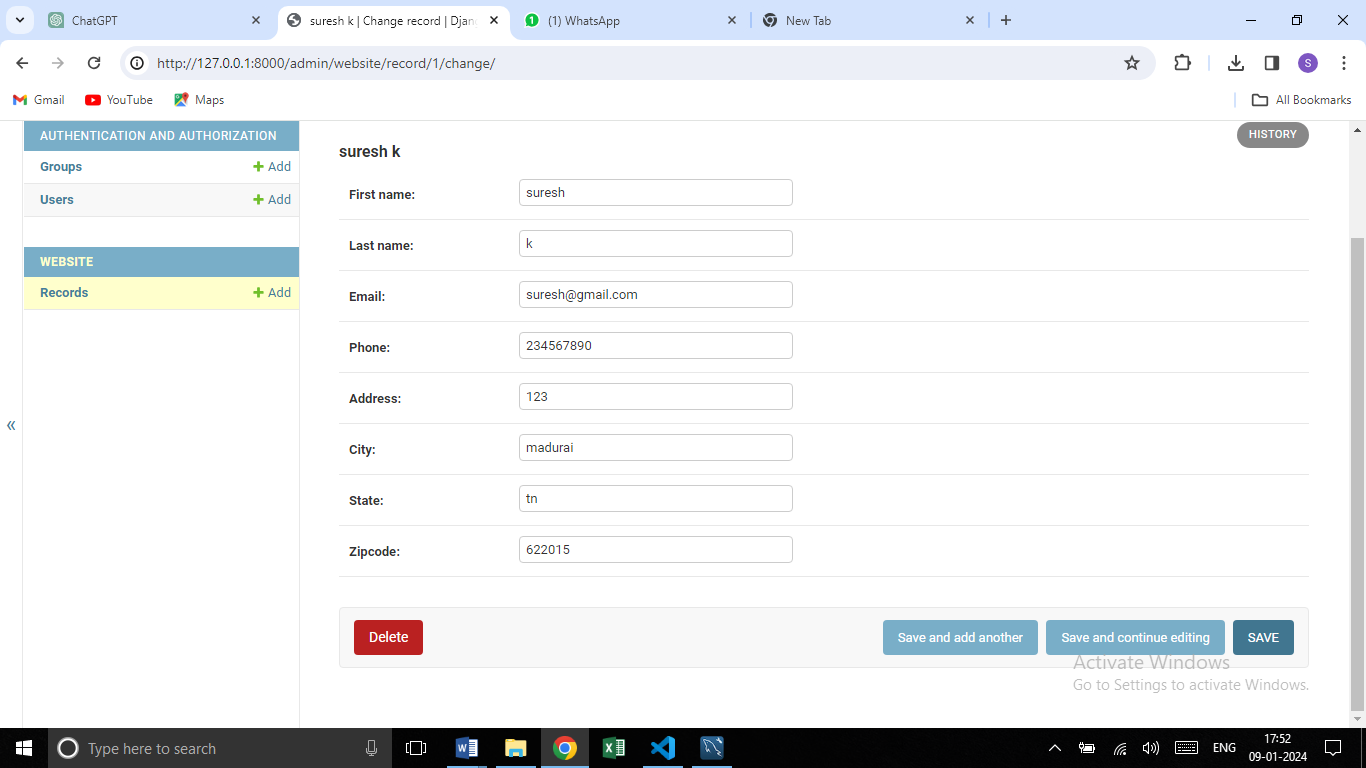
**Then if we click id 1, it shows a customer details information and also we can delete, update the customer details.**

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**ADMIN PAGE:**

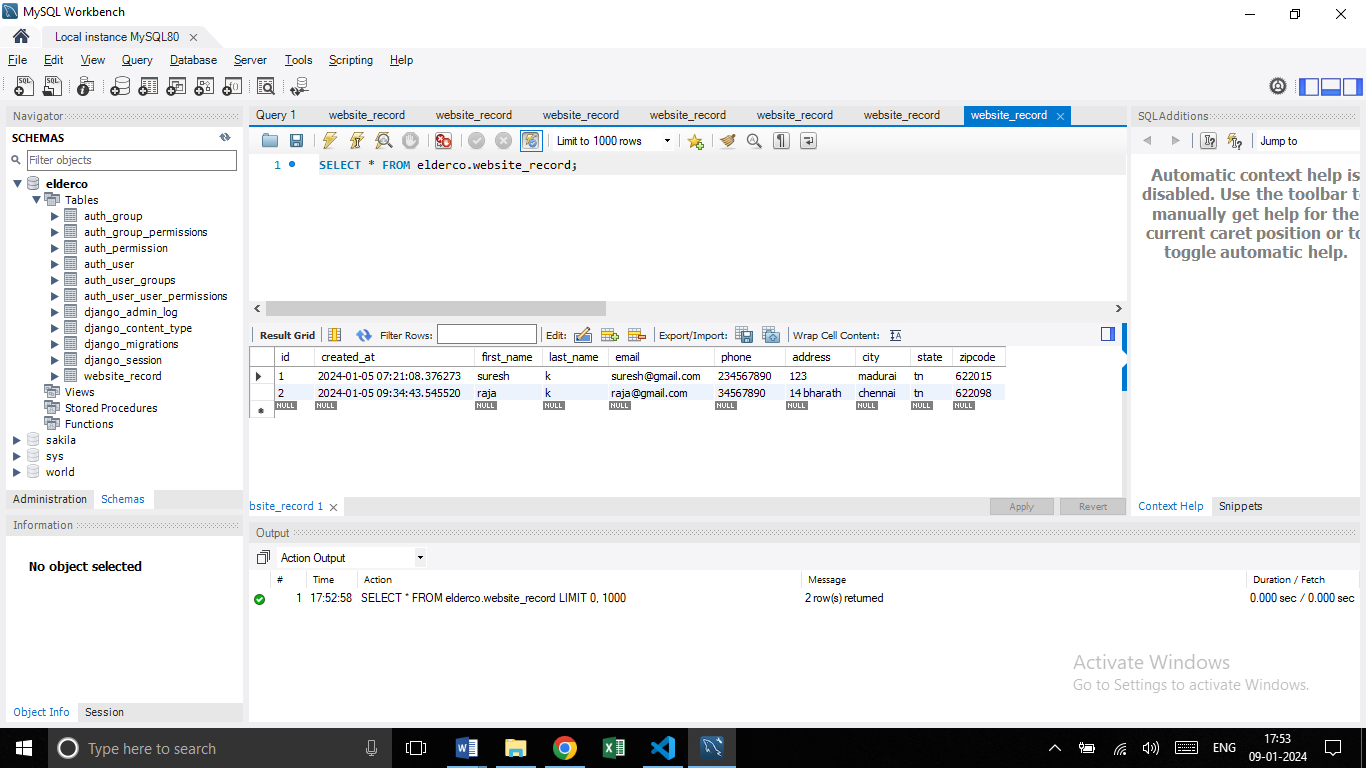
**Shows users list, website records we can edit the records here also.**

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**DATA FROM WEBSITE IS STORED IN MYSQL:**

**TABLE SHOWN AS:**

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**THANK YOU**