**CRM App Documentation**

Created by Daniel Garcia on 10/Aug/2017

**Overview:**

The app’s main purpose is to allow a user to keep track of their connections all in one place. The app keeps track of the user’s collaborators, showing their contact info, recent activity, and other pertinent information. The app also allows the user to quickly add new collaborators, record interactions with them, and update any information regarding a particular collaborator.

**Important Server Connection Information:**

There are 6 classes whose use should be noted;

KardiaFetcher: This class uses the Kardia API to get information from the server

KardiaProvider: This class uses SQL commands to get information from the app’s local database

CRMContract: This keeps all the constants used in the local database (which is all kept in SQL tables)

CRMOpenHelper: This simply creates the local database and all its tables

PostJson: This class uses OKHttp to connect to the Kardia server and takes care of uploading any new information

PatchJson: Much of this class is similar to PostJson, except it updates or patches existing information rather than posting new things

**Main Features:**

Profile Display: This activity displays a collaborator’s profile picture, contact info, and timeline (which includes any recent activity including interactions, prayer requests, etc.).

New Interactions: After any phone call made or email sent from the app, the user is asked whether or not to record that interaction. An interaction can also be manually added. Interactions keep track of the type of interaction (phone call, in-person, update, etc.), date and time of interaction, subject, and any relevant notes. Optionally, a follow-up can be scheduled (along with a brief note) that will create a notification for the user to remember to follow up on their interaction with the collaborator.

Engagement Tracks: The Engagement Activity lists all current collaborators actively in an Engagement Track, along with a brief comment. Clicking on a track leads to a detailed view that shows the track, the step within that track, a brief comment, and a longer description. The user has the option of moving the collaborator forward to the next step, or simply to edit and save the comment and description.

Person Search: A third party service called Vanilla Android is used to implement search functionality on the app, which is customizable to each activity that it’s in. The search functionality on the Main Activity allows an existing person in the Kardia server to be added as the current user’s collaborator. The Engagement Activity’s search functionality allows any collaborator to be placed in a new Engagement Track.

**Future To-Dos:**

The various activities (especially the Profile Activity) tends to take some time to load, so it would be good to add a progress bar or a loading bar while an activity is gathering all its information.

Once multiple users start adding new people to Kardia, it’ll be necessary to check for duplicates, to prevent anyone from being added twice.

On the web version of the New Interactions feature, a user can specify what contact was used along with the type of contact (so a user can specify which phone number was called or which email address used). However, this information does not seem to get displayed or used anywhere else, so it wasn’t included on the app. If so desired, that can be added to the Interaction Activity. The XML file for it already has a spinner there, but it is never used anywhere.

Requirements for next engagement step

Keep floating Plus button for Engagement Track?

**Issues/Bugs:**

Delete/query issue (working but not secure)

When advancing step in engagement track, “Network Issues” message (but not rly)