.Net school

Login

Username: _____

Password: _____

CRM

http://site/home

Hello, Mr. Smith   Logout

	Name ▲	Age ⬍	Status	Call Time ▼
Edit	Giacomo Guilizzoni	37	Offer Accepted	-
Edit	Marco Botton	34	Offer Rejected	-
Edit	Mariah Maclachlan	37	CallBack	10/10/2014 12:24
Edit	Valerie Liberty	22	Initial Call	10/09/2014 12:24
Edit	Guido Jack Guilizzoni	62	CallBack	10/12 2014 12:24

I< << 2,4,5,...8 >> >I

Add New Client

Valerie Liberty
0:12:23

Guido Jack Guilizzoni
0:35:12

List of next Calls / CallBacks within an hour (Data should be refreshed every 10 minutes)

each timer should work

Redirect to "Add New Client" Page

This grid contain:
1. Edit Button -> Redirect to "Edit Client" Page
2. Name -> First Name + Last Name
3. Client Age
4. Status ->
        Initial Call - user should call this client and try to sell smth
        CallBack - user had call and Call back or Recall required
        Offer Accepted - client bought smth (no additional action required)
        Offer Rejected - client discarded offer (no additional action required)
5. Callback -> date and time for next callback or recall, or call

6. Sorting and paging required (20 items per page)
7. Click on row -> redirect to "Call" page

CRM

http://site/addclient

Hello, Mr. Smith   Logout

First Name

Last Name

Date of birth

01/01/1960

Contacts

Phone	Type	
123	home	Edit Delete
256	mobile	Edit Delete
564	work	Edit Delete

add new phone number should not force page reload

phone number

Please Select...

home
mobile
work
other

Add Contact

Save   Cancel

CRM

http://site/editclient/10

Home

Hello, Mr. Smith   Logout

First Name

Name

Last Name

Last Name

Date of birth

01/01/1960

Contacts		
Phone	Type	
123	home	Edit Delete
256	mobile	Edit Delete
564	work	Edit Delete

Save   Cancel

phone number

Please Select...

home
mobile
work
other

Add Contact

CRM

← → ⟳ 🔍 http://site/calls/10   ☰

Home

Hello, Mr. Smith   Logout

Client: Valerie Liberty   Age: 37

Contacts

Phone	Type
123	home
256	mobile
564	work

History of Operations

Date	Type ▼	Call back	Comment	Amount
12/12/2013	Initial Call	12/12/2013 10:00	Planned initial call	
12/12/2013	Callback	12/13/2013 12:35	Client busy now	
12/13/2013	Offer Accepted		10 units	100000$

Sorting + paging (20 items per page)

Grid should be refreshed without page reload

Please Select Operation... ▼

Initial Call
Callback
Offer Rejected
Offer Accepted

|< << 2,4,5,...8 >> >|

Placeholder content depends on operation dropdown selection

┌─ Placeholder ──────────────────────────────┐
│   │
│   │
│   Save   Cancel   │
└──┘

┌─ Placeholder - Initial Call ───────────────┐
│ Initial call date and time   │
│ [01/01/1960] [📅]   │
│ Comment   │
│ [   ] │
│   │
│   Save   Cancel   │
└──┘

┌─ Placeholder - Callback ───────────────────┐
│ Callback date and time   │
│ [01/01/1960] [📅]   │
│ Comment   │
│ [   ] │
│   │
│   Save   Cancel   │
└──┘

┌─ Placeholder - Offer Accepted ─────────────┐
│ Total amount   │
│ [   ]   │
│ Comment   │
│ [   ] │
│   │
│   Save   Cancel   │
└──┘

┌─ Placeholder - Offer Rejected ─────────────┐
│ Comment   │
│ [   ] │
│   │
│   Save   Cancel   │
└──┘