CRM PROJECT

General

1. CRM system development based on monday.com website design
2. The system will include management of the following topics:
   - customers
   - Tasks / subtasks
   - users
3. The system will use the same main GRID functionality as monday.com
4. The software development will be .net MVC C# Database SQL SERVER
5. The offer will include documentation and installation on my computer
6. The design will be from right to left (RTL)
7. Responsive mobile support

Customers

CustomerID	NUMBER	
CompanyID	NOMERIC	
FullName	TEXT	
IdNumber	NOMERIC	
SortGroup	NOMERIC	
Address	TEXT	
City	NOMERIC	TABLE
Zip	TEXT	
Aria	NOMERIC	
Country	NOMERIC	TABLE
Phone	NOMERIC	
Phone2	NOMERIC	
PhoneMobile	NOMERIC	
Website	text	

Fax	NOMERIC	
Email	text	
Agent	NOMERIC	TABLE
Service	NOMERIC	TABLE
CustomerType	NOMERIC	TABLE
Status	NOMERIC	TABLE
Detartment	NOMERIC	TABLE
ClassificationMain	NOMERIC	TABLE
ClassificationSub	NOMERIC	TABLE
Contact	TEXT	
ContactSource	NOMERIC	TABLE
birthday	Date	
Notes	Text	
Vat	yes\no	
DateCreate	date	
DateUpdate	date	
UserCreate	text	
UserUpdate	text	
HoursHomain		from hour to hour

Task\Sub task

ערכים		Allow on Sub task
CompanyID	NUMERIN	
CompanyID	NUMERIN	
TaskID	NUMERIN	yes
TaskIdPatent	NUMERIN	
ContactType	TABLE (with color)	yes
WhoContacting	TABLE	yes
UserGet	TABLE	yes
User	TABLE	
Branch	TABLE	
Detartment	TABLE	
productId	TABLE	yes
ProductType	TABLE (with color)	yes
Charge	Yes/no	yes
Status	TABLE	yes

Contact	text	yes
Details	text	yes
Priority	TABLE (with color)	yes
ActualTreatmentType	TABLE	yes
ActualDetails	TEXT	yes
MoreCall	Yes/no	yes
NextDate	date	yes
DonDate	date	yes
DonUser	TABLE	yes
EndTime	time	yes
EndDate	date	yes
NextStatus	table	yes
Cancle	Yes/no	yes
CancelDate	date	yes
CancelTime	time	yes
AlarmDate	date	yes
AlarmTime	Time	yes
DateCreate	date	yes
DateUpdate	date	yes
UserCreate	text	
UserUpdate	text	

USERS

1. Login with username and password
2. Option to add users
3. . There are two types of users (user and administrator)Log in using two-step verification Sending a verification code by email and SMS for Login After entering a username and password
4. Allow register new user
5. Allow add user for company
6. Fields : first name\last name \email\phone\user name \password\phone\picture\ Birthday\company\role

GRID

The grid design is the work center of the system and the way of work will include

1. Sorting
2. Filter according to each of these in the table (equal to /contains/greater than ... in the system)
3. Search
4. Arrangement of rows

5. Arrangement of columns
6. Changing column headings
7. Hiding/showing columns
8. Determining the number of lines on a page (paging)
9. Editing option of all the fields in the grid
10. Immediate saving of each edit upon completion
11. Link to sub-tables as needed
12. Possibility of adding / editing data to the list
13. Color elements (status/product type)
14. Files field for each record
15. Performing operations on multiple selection of records
16. Possibility of adding a sub-record with the same functionality

Details

1. Each record will display all the subject's fields for editing

2. Each record will have the option of a conversation

3. Each record will have the option to attach files

4. Each entry will have the option to send an email and SMS

5. Every action will be recorded all change to log

6. Editing is saved at the end of typing

7. The window opens on the side with the option to resize

My WORK

1. Option to display all tasks with the option to display all tasks or select a user

2. Adding a filter option as in the picture

TimeLine

1. Display of all tasks in the system in a log view with the option of filtering by client