

SealDeal.com
A CRM for you.

(TCS Remote Internship 2.0)

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Table of Content

- **Introduction**
- **Technology Stack**
- **Module's Information**
- **Test Cases**
- **Demonstration**
- **Future Enhancements**
- **Sources**

Introduction

We belong to the generation of mobility that also caters to the needs of the customer, more than ever before. With the advent of GPS, connectivity reach spans from India to Australia and beyond..

Experiential marketing provides an unmatched experience which garners the loyalty of the consumers. This is where a CRM makes an impact. **It involves keeping track of customer information and trends, therefore it is more than just about database as it involves a fair amount of management strategy and customer insight to launch a successful goal-oriented campaign for customer retention.**

Keeping all this into consideration we have created ***SEALDEAL- A CRM to make your business run.*** It provides a platform to manage customer relationships while improving customer service. CRM helps consolidate all relevant business information from various departments and sources into a single easy-to-access database.

Services offered by our CRM are as follows:

1. **It helps capture the customer requirements more efficiently.** Through its varied parameters and analysis techniques, **SealDeal equips automation establishments with the necessary consumer data to act upon.** This help organizations(Service Providers) reinvent their retailing approach according to customer's needs and expectations.

2. Helps in Competition analysis. Complete analysis of competition through graphs and charts . This technology enables establishments to gauge competition through tracking their purchase cycle. With this inference, companies can plan their point of action in accordance to market scenario. **A healthy market analysis ensures constant enhancement plans to suit the need of the moment.**

3. Keep track of activities to be done through TODO. It provided organizations to keep abreast with internal happenings. Activities can be planned and shared amongst every member in an efficient manner. This cuts off internal miscommunication to a great extent.

4. Promotes seamless Customer-Organization interaction through 'The ChaTBoX'.

Technology Stack

Front end: HTML, CSS

Back end:

Frameworks: Python Framework-Django, Bootstrap/Semantic UI

Others: JavaScript, SQLite3 DataBase

Cloud Platform: Website is hosted on pythonanywhere.com

shreya07.pythonanywhere.com/homepage

MODULE'S INFORMATION

Registration :

User can register one's account . After one registers, he gets an email with a link to verify his account. Only after he clicks on the link, his account gets activated.

Registration Form holds the following information about the customer :-

- Username - This username is unique for every user through which any user can login into his account.
- Password - Authenticates user
- Email ID
- Company - This is to know the concerned company of the user signing up.
- Checkboxes of Customer/Provider - This is to verify if the user signing up is a customer or a provider.

Login:

- User can login after he registers and verifies his account.
- Also, if the user forgets his password, he can go to forgot password option and reset his password using email authentication.
- User can also change his/her password after logging in by going on the change password option on the dashboard. As he clicks on it, he will be asked to provide his email ID. After that the user will get an email with a link that will direct him to change his password.

Dashboard:

- Dashboard is a real time snapshot of company metrics and its performance indicators.
- Various reports and graphs of the company are displayed on the dashboard.
- To Do - This keeps an account of the client's to do list.
- Notification panel: A panel that shows notifications of products and services and also the leads.
- New orders panel - to view the new orders.
- New Comments panel - to view the chat messages.
- Search bar to search for leads/etc.
- Logout option for the user to log out.

Chatbox :

- This is a real time chat server program. Through this, a customer can chat with an employee of a company/help service in real time.
- The service provider(or the superuser) will be at one end and the customer or the client at the other. This module uses ajax (that prevents reloading of the page every time) and JQuery.
- Previous chats are deleted with a new login.

Leads :

- Leads are the potential customers that a provider can approach. They are displayed only on the provider dashboard.
- Leads are selected from the database of registered users based on the current activity.
- The most promising 6 customers are shown on the notification panel.

Complaints Forum :

- It is a common forum for customer to register their complaints. This is accessible through dashboard.
- Users can also provide reviews about services/product on this forum.

Selling services :

- A company can sell their services through this forum and enter into the agreement with the potential customer company.
- A customer needs to accept the Service Level Agreement to register or ask for a service from his account.

Test Cases

TEST ID	Test Name	Test Data	Steps to reproduce	Results	Module
TC_001	Validating the header and footer of the homepage according to the mocks.		1. Go to site	The header and footer should be according to the mocks.	HomePage
TC_002	Validating the Customer Login with valid Data	Userid : s0 Password :s0	1. Go to the homepage 2.Click Login 3. Enter UserId 4. Enter Password 5. Click Submit	User should Login into application	Login
TC_003	Validating graphs and calendar on the dashboard	The user is logged in	1.Selects role 2.Views dashboard	Graphs and calendar should be properly aligned on the dashboard	Dashboard

TEST ID	Test Name	Test Data	Steps to reproduce	Results	Module
TC_004	Validating TODO	The user is logged in	1.Selects role 2.Clicks TODO	TODO functionality should be functional	TODO
TC_005	Validating NEW COMMENTS	The user is logged in	1.Selects role 2.Clicks NEW COMMENTS	NEW COMMENTS functionality should be functional	NEW COMMENTS
TC_007	Validating NEW ORDERS	The user is logged in as Service Provider	1.Selects role 2.Clicks NEW ORDERS	The provider should be able to view all the orders for his company	NEW ORDERS
TC_007	Validating ALL SERVICES	The user is logged in as Client	1.Selects role 2.Clicks VIEW ALL SERVICES	The customer should be able to view all the services for companies	ALL SERVICES

TEST ID	Test Name	Test Data	Steps to reproduce	Results	Module
TC_008	Validating the lead generation	The user is logged in as Service Provider	1.Selects role 2.Views Dashboard	The provider should be able to view 6 potential customers	Lead Generation
TC_009	Validating Add new Services	The user is logged in as Service Provider	1.Selects role 2.Clicks Add new Services	The provider should be able to add new service for his company	Services
TC_010	Validating View Services	The user is logged in as Service Provider	1.Selects role 2.Clicks Services	The provider should be able to view the services provided by his company	Services
TC_011	Validating filling of SLA	The user is logged in as Client	1.Selects role 2.Clicks Select Service	The customer should be able to select a service and fill the SLA	Services
TC_012	Validating Complaint Forum	The user is logged in	1.Selects role 2.Views Dashboard	The user should be able to submit a complaint	Complaint Forum

Demonstration

Welcome to SealDeal.com. This is the first page that user encounters. It introduces the customers to various service offered by SealDeal.com, its portfolio and to the team members.

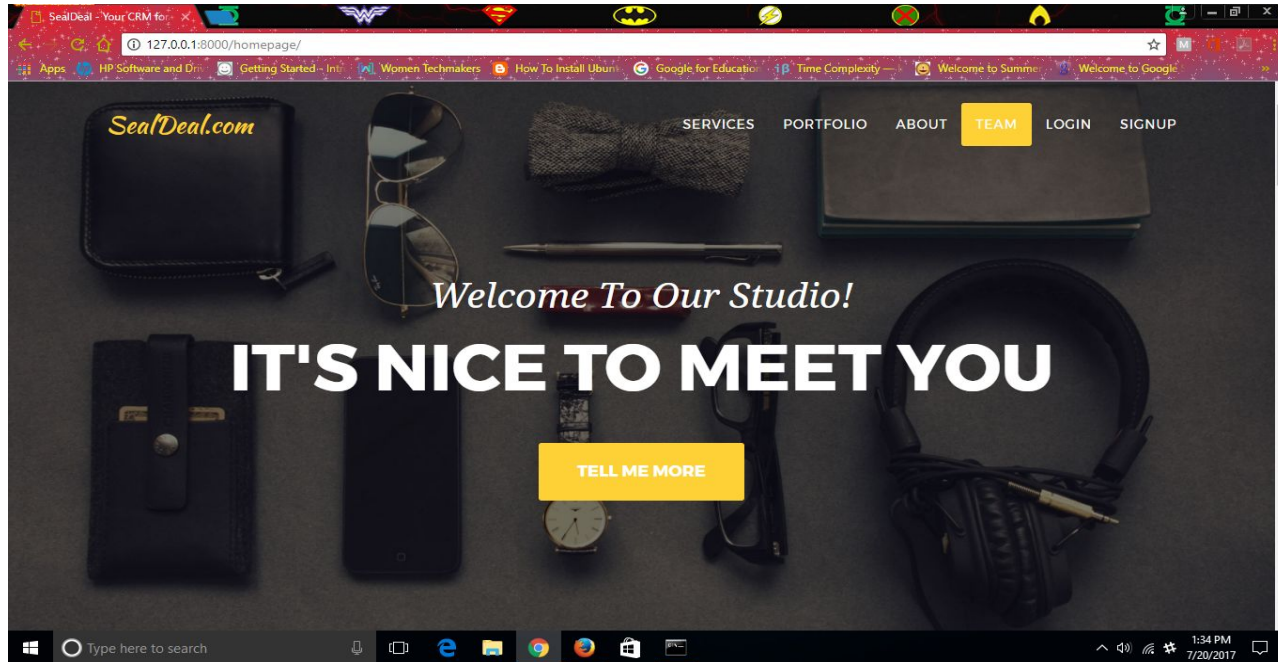
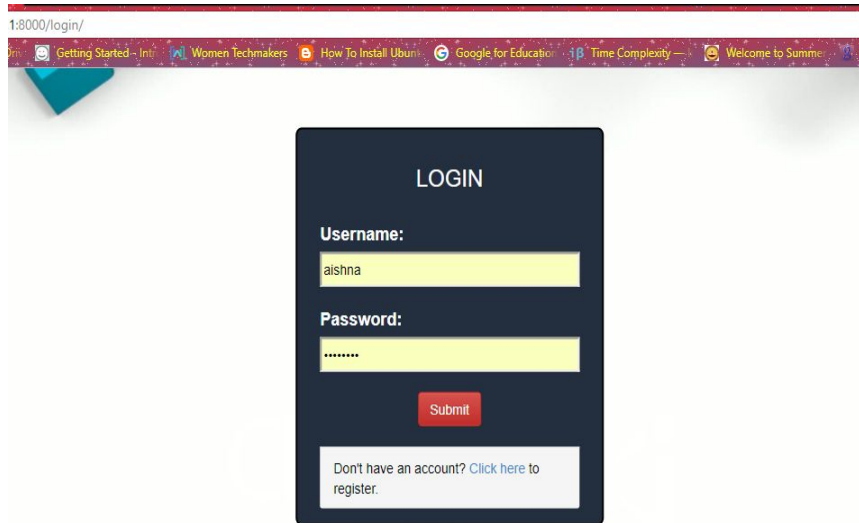


fig1: Homepage

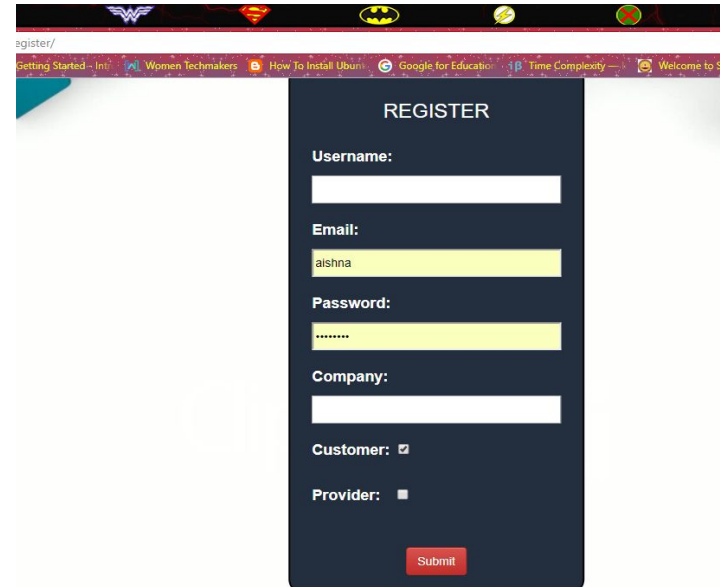
Login/Register

When the user clicks 'Login' or 'Signup' button on the homepage, he/she is redirected to the login and register page respectively.



The screenshot shows a web browser window with the address bar displaying '1:8000/login/'. The browser's tab bar includes several tabs: 'Getting Started - Int...', 'Women Technmakers', 'How To Install Ubuntu', 'Google for Education', 'Time Complexity', and 'Welcome to Summe'. The main content area features a dark blue login form titled 'LOGIN'. It contains two input fields: 'Username:' with the text 'aishna' and 'Password:' with masked characters '*****'. A red 'Submit' button is positioned below the password field. At the bottom of the form, a link states: 'Don't have an account? [Click here to register.](#)'

fig 2: Login



The screenshot shows a web browser window with the address bar displaying 'register/'. The browser's tab bar is identical to the one in the login page. The main content area features a dark blue registration form titled 'REGISTER'. It contains five input fields: 'Username:', 'Email:', 'Password:', 'Company:', and 'Customer:'. The 'Email:' field contains the text 'aishna', and the 'Password:' field contains masked characters '*****'. Below the 'Company:' field is a checkbox labeled 'Customer:'. At the bottom of the form is a red 'Submit' button.

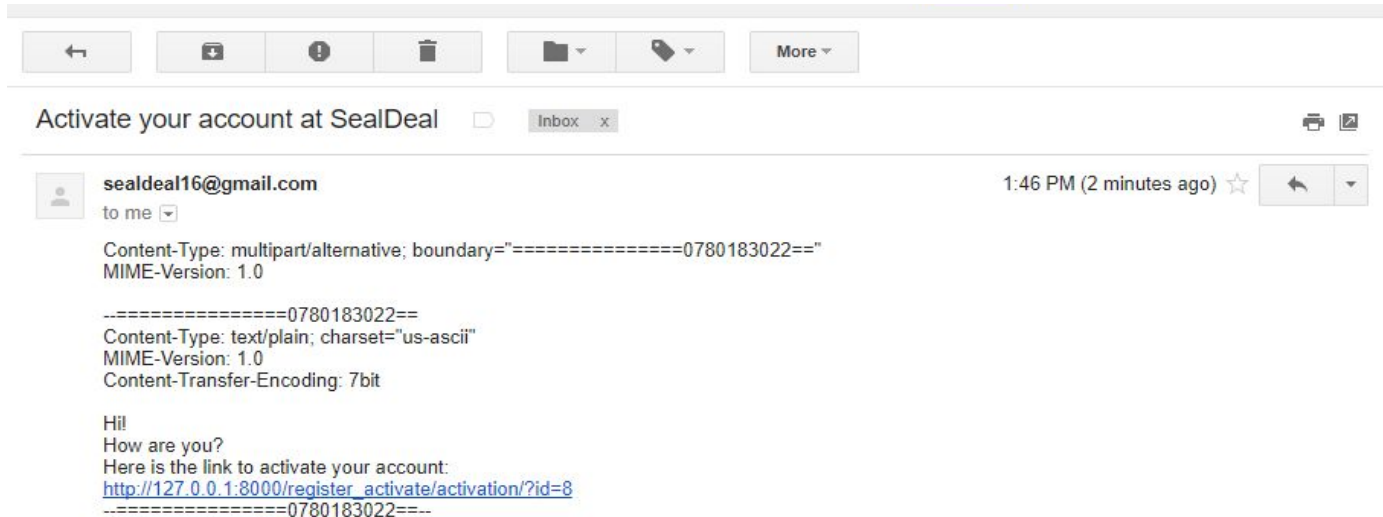
fig 3: Register

Email Confirmation

As the user registers himself/herself, he/she receives a confirmation mail on the registered email id (**without confirming, the user cannot proceed**).



fig 4: Confirmation Mail



DASHBOARD

Once, the user confirms his/her email id, the user is redirected to the login page (*fig 2*). After logging in successfully, the user is redirected to the dashboard. The dashboard enables the user to track the history and status of the services he/she has opted for. It also provides various other facilities such as ToDo, calendar, etc.

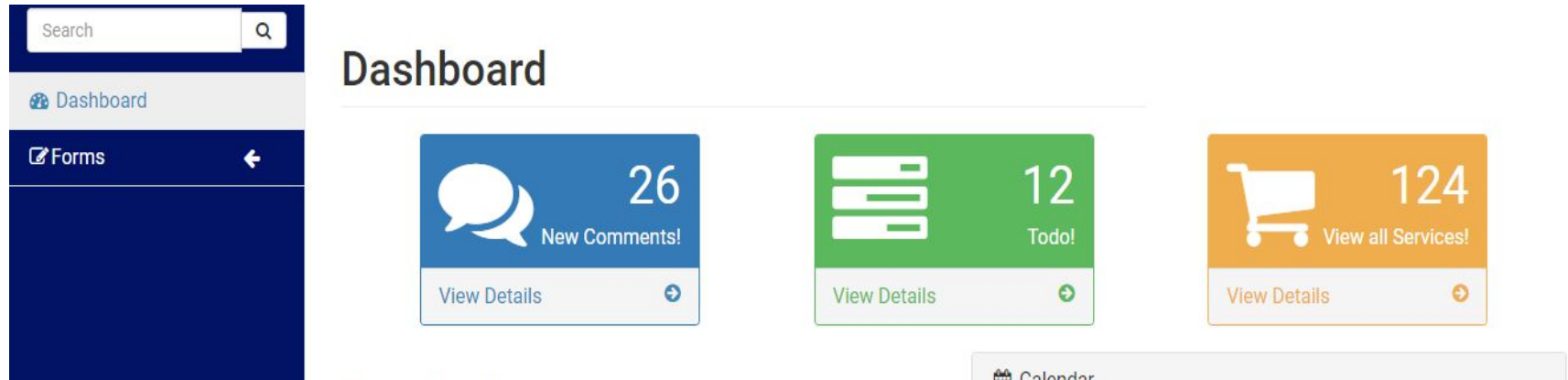


fig 5: Dashboard

Customer Dashboard

The customer dashboard is a customer specific page that helps the customer to analyse the services he/she has opted. The customer can also manage his/her events in the calendar.

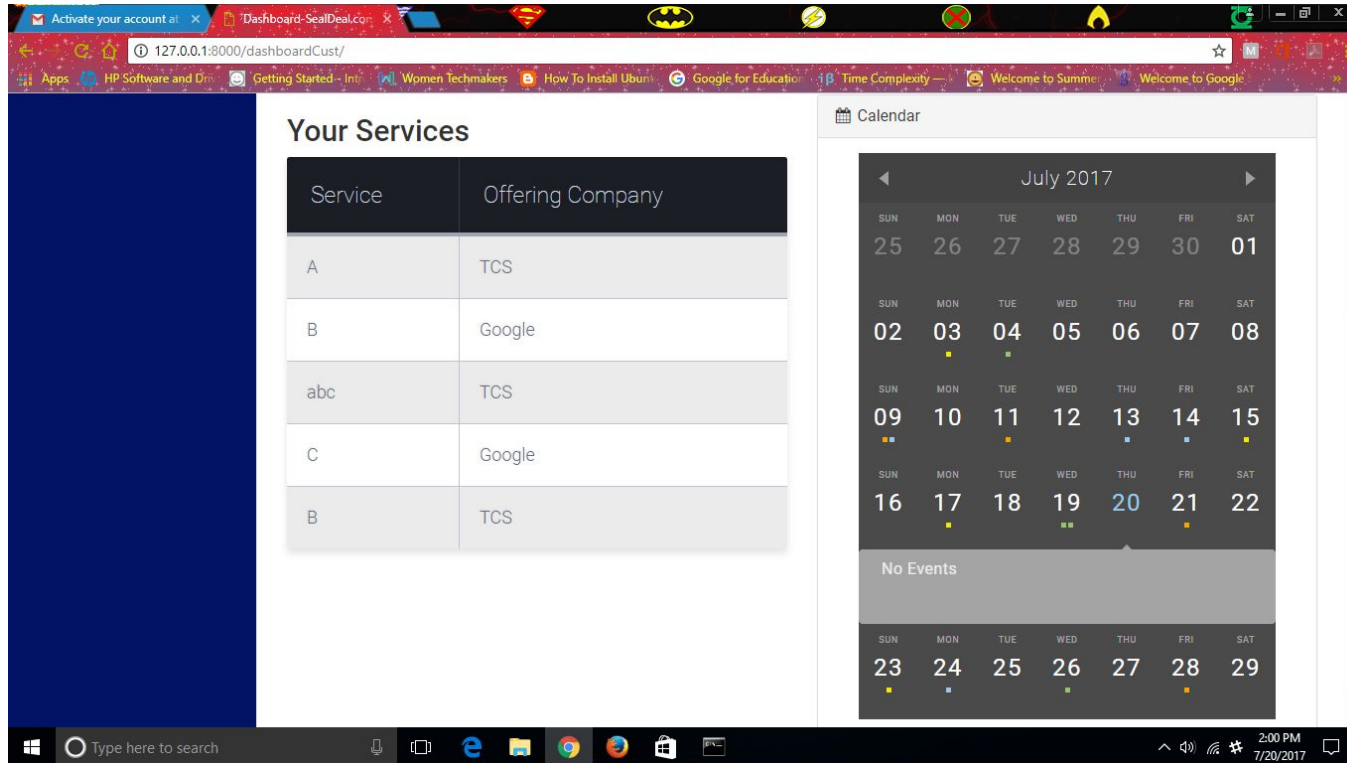
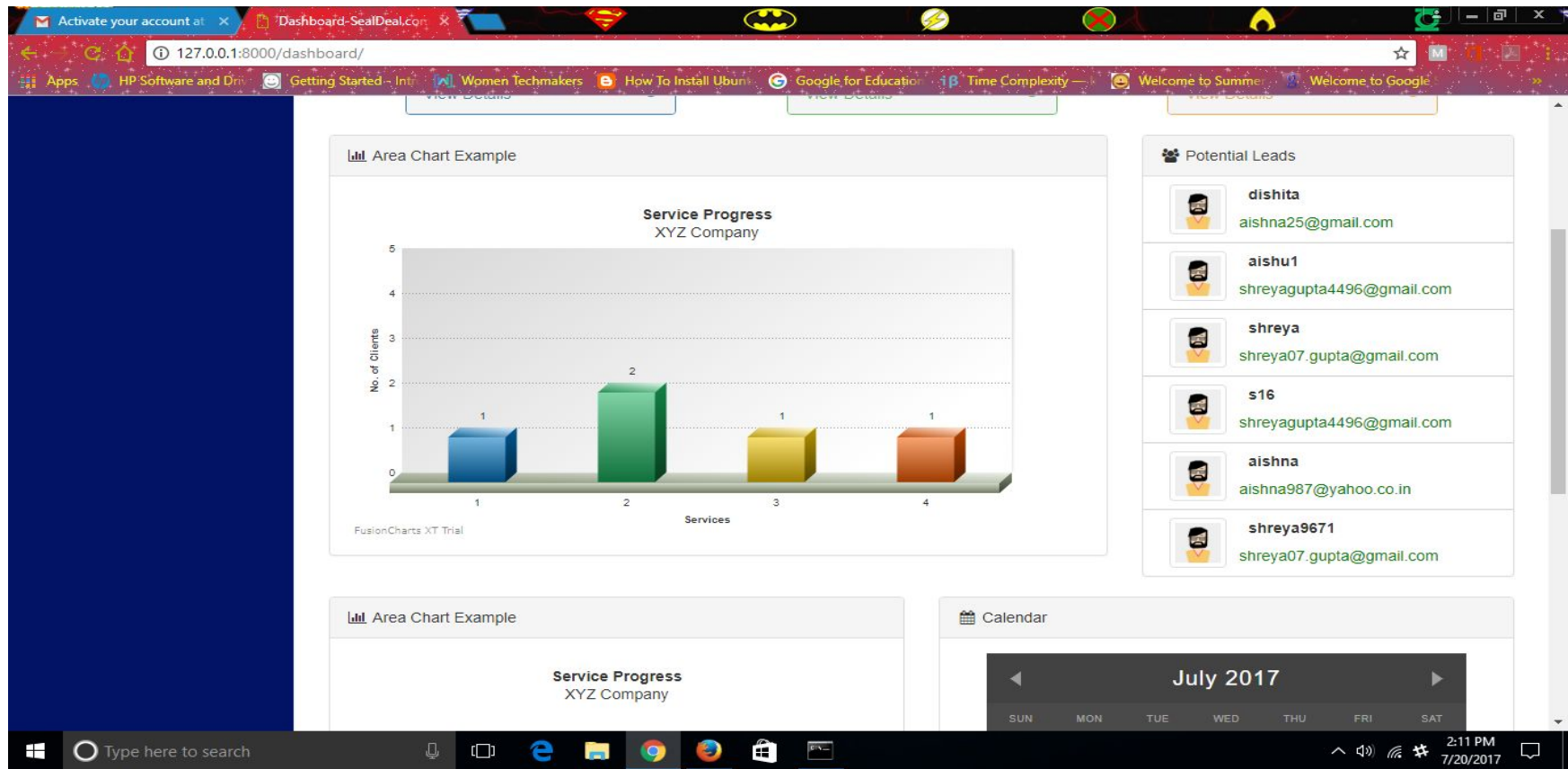


fig 6: Customer Dashboard

Provider Dashboard

The provider dashboard is a provider specific page that helps the service provider to manage his/her clients and the services that his/her company provides. The dashboard provides a graphical representation of the statistics of the services that have become prominent in the market. This helps in easy mining of knowledge from the data. The dashboard also helps the company in finding leads. The 'Potential Leads' section on the provider dashboard gives information of various potential customers.



*fig 7(a): Provider Dashboard
Graphical Representation (left), Potential Leads(right)*

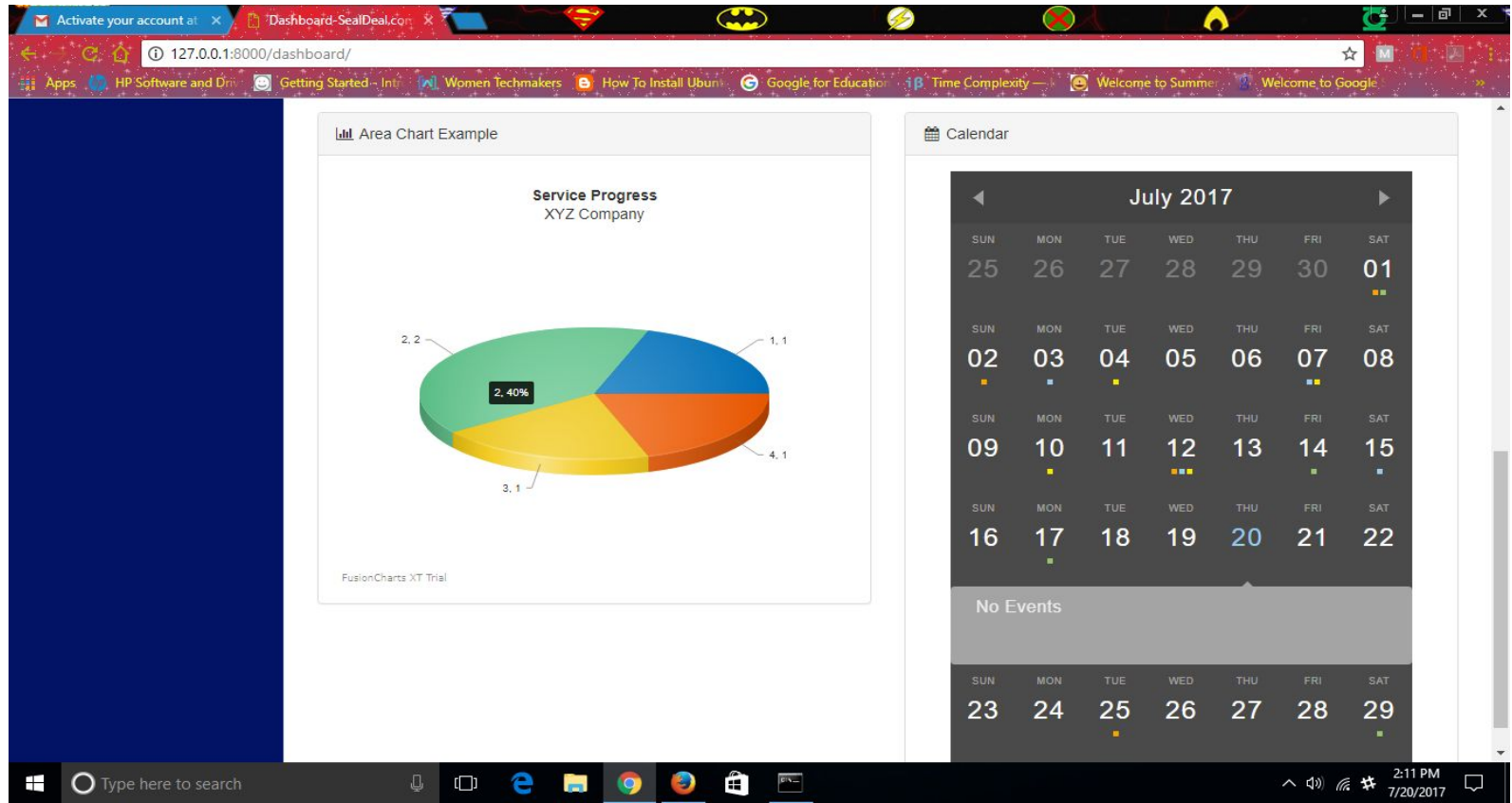
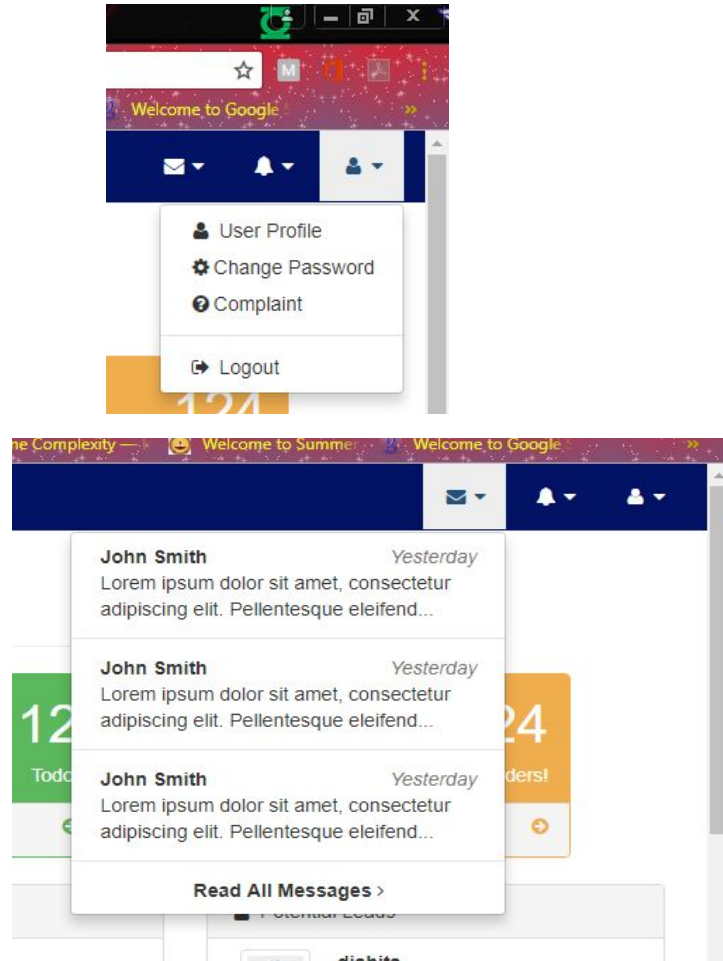


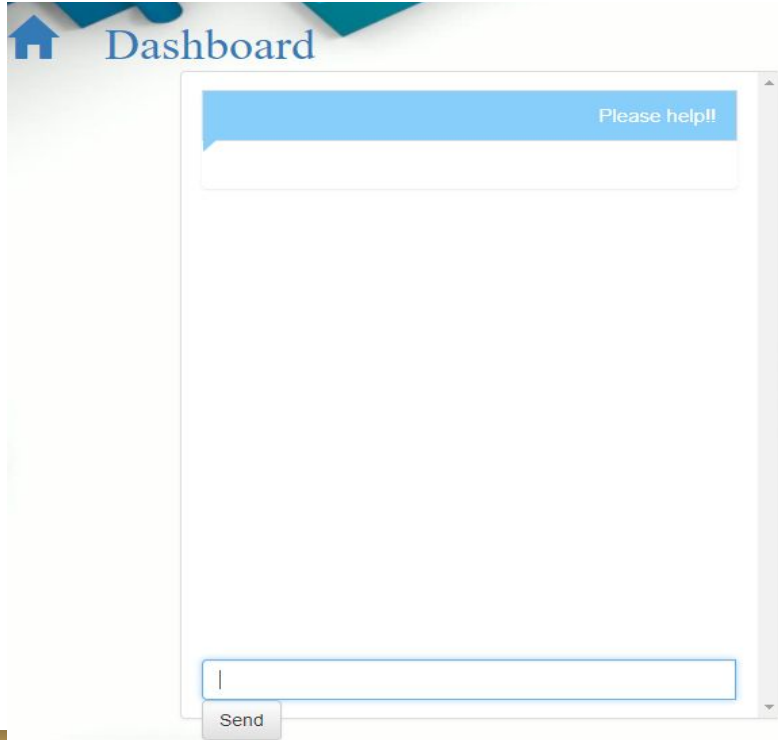
fig 7(b): Provider Dashboard
Graphical Representation (left), Calendar(right)



- The user can edit his/her account information using the ‘Change Password’ and ‘User Profile’ in the drop-down available on the top-right corner of the dashboard.
- The ‘Complaint’ option redirects the user the complaint forum the user can lodge his/her complaint or compliments (about customer/provider) with SealDeal.com.
- The user can also view his/her messages in the first drop down on the top-right corner of the dashboard.

The ChaTBox

‘The ChaTBox’ is a feature of SealDeal.com where the client can interact with its service provider and seek help/advice regarding a service.



*fig 8: The ChaTBox
Provider-Client Interaction Application*

Complaint Form

The user can lodge his/her complaint against client/provider using the complaint form.

Client
name:

Linked
company:

Complaint
type:

Complaint
description:

Save

fig 9: Complaint Form

Registering Service - Provider

- The provider can register new service using the service form (by clicking ‘**Add new Service**’ option).
- The provider can view all the services offered by his company using ‘**View all Services**’ on the dashboard.

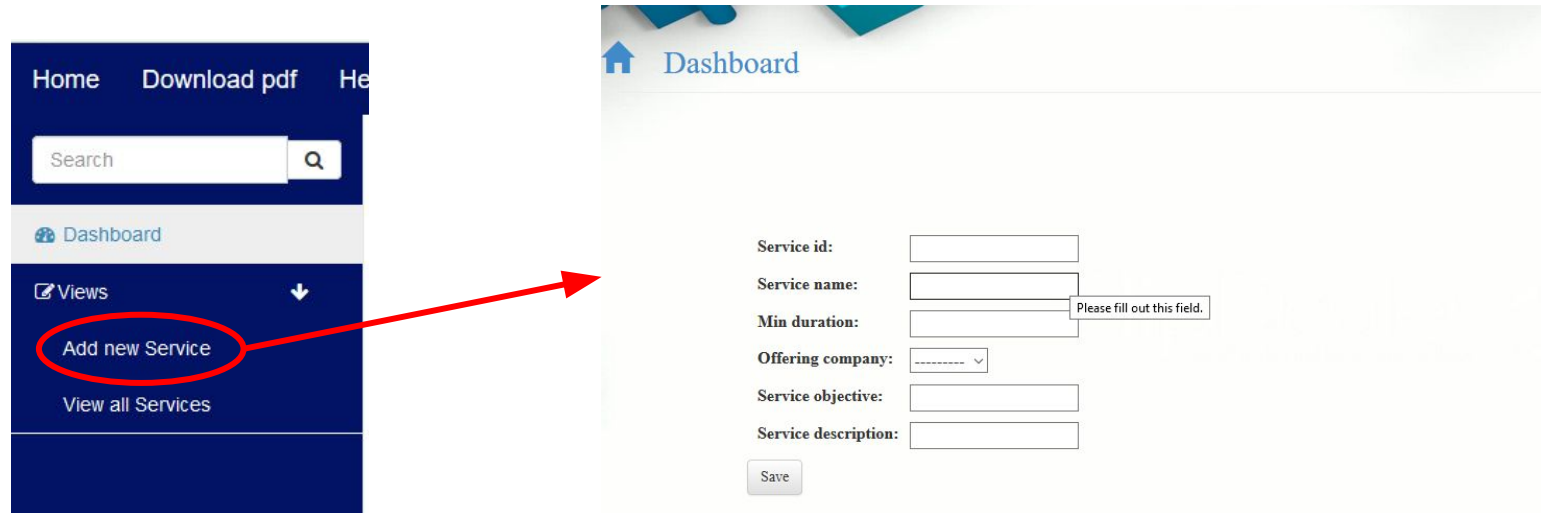


fig 10: Add new Service

Provider can manage his clients and download their respective SLAs.

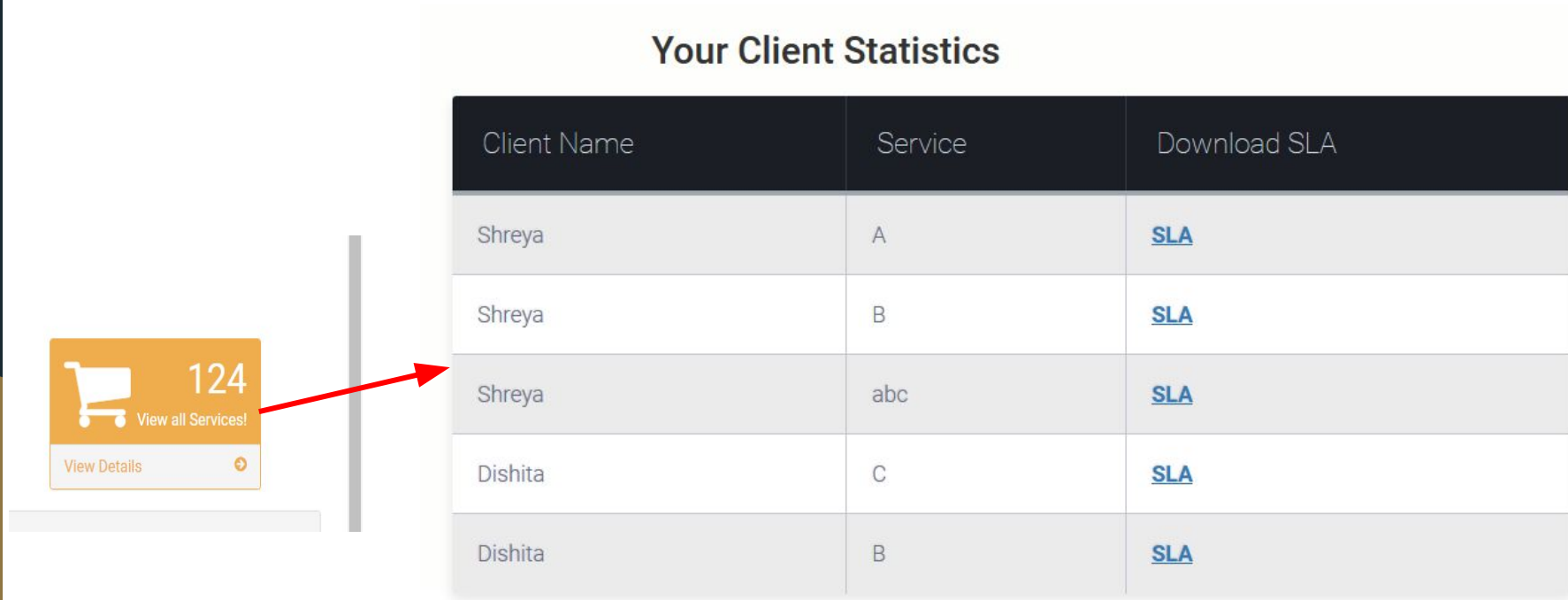
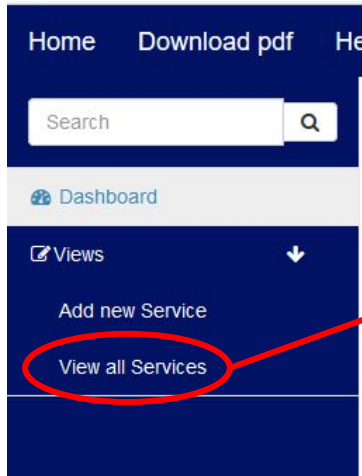


fig 11: Managing SLAs

Viewing Service -

The provider can view all the services that his company can offer to the clients.



Services Provided by your company

Service Name	Min Duration	Service Objective	Description
A	5	A	A
B	B	B	B
C	C	C	C
abc			

fig 12: Managing Services

Opting for new Services - Client


The client can opt for new services by filling the 'service form'



The image displays a web application interface. On the left is a dark blue sidebar with navigation links: 'Home', 'Download pdf', a search bar, 'Dashboard', 'Forms' (with a dropdown arrow), 'SLA (Service Level Agreement)', and 'Service Form' (which is circled in red). A red arrow points from the 'Service Form' link to the main content area. The main content area shows a browser window with the URL '127.0.0.1:8000/service_new/'. The page has a header with a home icon and the word 'Dashboard'. The form contains two input fields: 'Service name:' and 'Offering company:' (a dropdown menu). Below these is a button labeled 'Proceed to fill SLA'.

fig 13: Opting new Services

127.0.0.1:8000/service_new/

 Dashboard

Service name:

Offering company:

[Proceed to fill SLA](#)

127.0.0.1:8000/sla_new/

Form

Service name:

Min duration:

Service id:

Company name:

Point of contact:

Client name:

Service date:

Target audience:

Service objective:

Performance parameter:

Performance measure:

Service hours:

Schedule:

[Save](#)

fig 14: Signing SLA and finalising agreement

Future Enhancements

In future we wish to add the following :

1. A chatbot service so that even when a provider is not there at the other end of the chat service, a client gets the response from the bot.
2. Customer's company specific graphs and reports will be shown on the customer's dashboard when he/she logs in.
3. Faster and optimized search.

Sources

- Stackoverflow
- DjangoGirls tutorials
- Coding Entrepreneurs
- Django Documentation
- W3Schools
- StartBootstrap