

Project Specifications

Customer Relationship Management System

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1. Abstract

Customer relationship management (CRM) is a term applied to processes implemented by a company to handle its customer interactions in an organized and efficient manner. The customers can include current customers as well as prospective customers. The objective of a CRM application is to improve customer experience with the organization and to promote efficiency in marketing, sales and service functions of the organization.

A CRM system can be used by employees from different departments, such as sales, marketing, customer service and training. Various communication channels (telephone, web, personal visit etc) may be used by customers to interact with these departments. A CRM system provides an integrated view of the customer and all his/her interactions with the company across various communication channels.

CRM Management Pocketbook This project is for a reputed manufacturing company that supplies UPSs (Uninterrupted Power Supply Machines) and Inverters for both home and office use. The company already has an integrated system for Order processing, Manufacturing and Accounting. The complete details about customers and their transactions are maintained in the database. The company is planning to build a centralized contact center where all new orders, service requests, queries and complaints are received and processed.

2. High Level Design Specification

The project contains the following main modules.

- Registration
- Query
- Pricing
- Compliant
- Search

- **Registration Module:**

This module allows the users to register themselves. The registered users can sign in to their account and perform operations such as querying product features, product pricing, registering a complaint against a product etc.

- **Query Module:**

This module allows the user to query about the available products, newly released products, features of products etc. The product field should be populated with all product names, from which the user can select one product.

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- **Pricing Module:**

The customers can view the price details of a product or for a service.

- **Compliant Module:**

This module allows the customers to register a complaint against a product purchased, poor service, quality of the product etc.

- **Search Module**

This module is used to search the commonly available information in the site for both registered and unregistered users.

3. Mandatory Requirements

- **User-defined exceptions must be generated.**

The following are the sample scenarios where user-defined exceptions required. Identify the other mandatory requirements and implement them.

- a. Entering Invalid user id
- b. Entering Invalid user name and password etc.

- **Primary Key and foreign key constraints must be specified in database design.**

- **Session management must be implemented.**

Session tracking or management must be properly maintained between the pages until the user logs out the session.

4. Best Practices

The development team must follow the best practices.

1. Coding Standard

- Methods and class names must be meaningful
- Meaningful names for variables
- Meaningful names for controls. To clearly identify the controls, the controls name can start with the control name followed by their functionality name

Sample

txtCustomerName – text field which is used to enter the customer name

btSubmit – button to submit the fields entry

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2. Validation for all the fields

- Missing of mandatory fields entry
- Entering numbers for name field etc.
- Identify the other required validation and implement them.

3. Layout design and arrangement of the controls must be proper in UI design

4. Title messages for each dialog and screen must be meaningful.

5. Deliverables Expected

- Project Documentation Report
- Database script file
- UI design document

6. Database Design

A partial database schema is given below. Additional tables or attributes may be added as per requirement. These database tables are samples only.

USER_DETAILS

| Field | Description |
|---------|------------------------------|
| UserId | Customer Registration Number |
| Fname | First Name |
| Lname | Last Name |
| Address | Address |
| Gender | Gender |
| Emailid | Email ID |

PRODUCT_DETAILS

| Field | Description |
|-----------------|---------------------------|
| Product_code | Product ID |
| Product_Name | Product Name |
| Base_Price | Product base Price |
| Warranty_months | Product warrant in months |
| Launch_date | Product Launch date |
| Battery_Price | Battery price |

| | |
|-----------------------|-------------------------|
| Svc_at_Client_Place | Service at Client Place |
| Addl_warranty_peryear | Additional warranty |

COMPLAINT

| Field | Description |
|-------------------|--|
| Complaint_Number | Complaint Number to tack the complaint status |
| Customer_Name | Customer number who rises the complaint |
| Contact_Number | Customer contact number |
| Product_code | Product number |
| Complaint_details | Complaint details |
| Complaint_type | Complaint type I. Equipment malfunction II. Price charged is too high III. Service not rendered in time |
| Complaint_date | Complaint date |
| Complaint_status | Complaint status |
| Status_date | Status date |

SERVICE

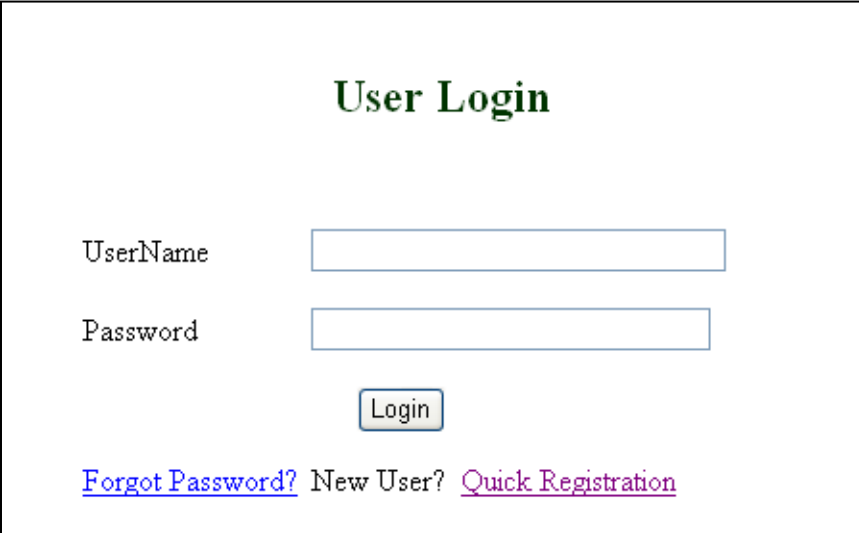
| Field | Description |
|------------------|---|
| Complaint_Number | Complaint Number to tack the complaint status |
| SID | Solving ID |
| SDate | Solving Date |
| Description | Message for the complaint |
| SolvedBy | Name of the person who solved the complaint |

LOGIN_DETAILS

| Field | Description |
|----------|-------------|
| User_Id | User Id |
| Password | Password |

1. SCREEN DESIGN

User Login



The User Login screen features a central title "User Login" in a green serif font. Below the title are two input fields: "UserName" and "Password", each with a light blue border. A "Login" button with a grey gradient and rounded corners is positioned below the password field. At the bottom, there are three links: "Forgot Password?" in blue, "New User?" in black, and "Quick Registration" in purple.

User Login

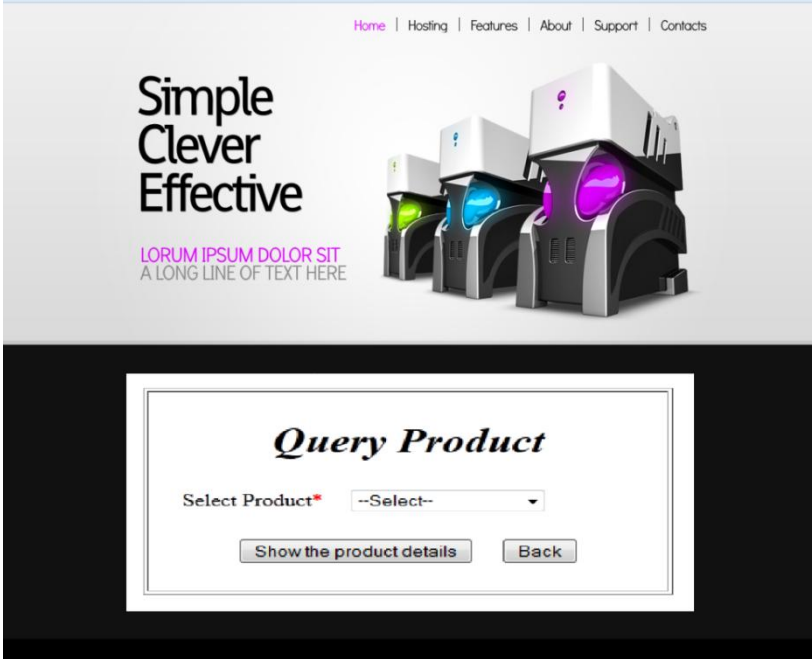
UserName

Password

Login

[Forgot Password?](#) [New User?](#) [Quick Registration](#)

Query Product



The Query Product screen is part of a website with a header navigation bar containing links: Home, Hosting, Features, About, Support, and Contacts. The main banner area has the text "Simple Clever Effective" in a large, bold, black font, followed by "LORUM IPSUM DOLOR SIT A LONG LINE OF TEXT HERE" in a smaller, pink font. To the right of the text is a 3D illustration of three server racks with glowing green, blue, and purple lights. Below the banner is a white box with a black border containing the title "Query Product" in a bold, italicized black font. Inside this box is a "Select Product*" label, a dropdown menu with "--Select--", and two buttons: "Show the product details" and "Back".

Home | Hosting | Features | About | Support | Contacts

Simple
Clever
Effective

LORUM IPSUM DOLOR SIT
A LONG LINE OF TEXT HERE

Query Product

Select Product* --Select--

Show the product details Back

Project Specification

Product Details

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LORUM IPSUM DOLOR SIT
A LONG LINE OF TEXT HERE



Product Details

Product Code 001

Description

- 1000/1800W inverter easily powers TVs, small appliances, and other electronics
- Built-in 15A circuit breaker to protect GFCI connected loads
- Up to 15A/20A pass through for hardwired loads for XM1000/XM1800 respectively
- Digital remote control displays power output, AC source and battery voltage

Features

- Battery over-voltage and under-voltage protection
- Over temperature shutdown
- Automatic overload protection

Base Price Rs.8000/-

Warranty 1 Year 10 Months

Launch date Jan 2015


OK

Registering a Complaint

Home | Hosting | Features | About | Support | Contacts

Simple
Clever
Effective

LORUM IPSUM DOLOR SIT
A LONG LINE OF TEXT HERE



Register Complaint

Customer Name*

Contact Phone #*

Product*

Complaint Description*

Complaint type*

--Select--

--select--

Submit

Clear

Back