# Assessment Task Instructions

**Outcome covered 3**

You are required to develop the front end for a database for the attached scenario using the given data model.

The database developed should use appropriate fields from the given data model and provide the following facilities to the user:

 Appropriate forms for entering data.

 Appropriate forms for editing data.

 Appropriate forms for deleting data.

 Appropriate reports for displaying data.

Once the database has been developed, you should use the given test plan to ensure that the user can:

 enter data records

 edit data records

 delete data records

 display data records

 search for data records

**Scenario**

A salesperson currently uses a paper based system to keep track of their clients and the contact calls they have had with them. They would like to replace this system with a computerised system. The new system needs to allow them to:

 add new customers

 add new contact call records for existing customers

 display the contact records for an existing customer

 display all of the customers

 remove customers

The sample information below illustrates the type of information that they would like to store.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | Sarah Campbell | | **Home phone** | | 0141 111111 |
| **Address** | 100 Main Street  Hyndland | | **Mobile phone** | | 0746 123456 |
| **E-mail** sarah@campbell.co.uk | | | | | |
| **City** | Glasgow | | **Postcode** | | G1 ABC |
| **Contact records for** Sarah Campbell | | | | | |
| **Date** | | **Type** | | **Notes** | |
| 12/12/2012 | | Phone | | Phoned to make appointment early January to discuss insurance provision. | |
| 11/1/2013 | | F2F | | Discussed current insurance provisions and took out additional life policy for partner Jack Brown. | |
| 12/1/2013 | | EMail | | E-mailed to let her know policy is setup. | |

**Given data model**

Your lecturer will supply you with an electronic version of this database model.



The category field for the calls table has a list containing the following values:

 Face-to-face

 Telephone

 E-mail

For each activity you should include appropriate screenshots showing that you have successfully completed the activity.

**Activity 1**

1. Design and create a form that will allow you to add details about a client and contacts, delete records and find records.
2. Design and create reports that will show the data in each table and the contact details only for a specified customer.

**Activity 2**

(a) Add the following five clients to your database using the forms you have created.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | Sarah Campbell | **Home phone** | 0141 111111 |
| **Address** | 100 Main Street  Hyndland | **Mobile phone** | 0746 123456 |
| **E-mail** sarah@campbell.co.uk | | | |
| **City** | Glasgow | **Postcode** | G1 ABC |

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | Charlie Brown | **Home phone** | 0141 123456 |
| **Address** | 12 Kelvin Street  Hyndland | **Mobile phone** | 0746 111111 |
| **E-mail** charlie@brown.co.uk | | | |
| **City** | Glasgow | **Postcode** | G1 DEF |

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | Aran Lee | **Home phone** | 0131 111111 |
| **Address** | 100 Main Street  Muirhouse | **Mobile phone** | 0743 123456 |
| **E-mail** aran@scotland.co.uk | | | |
| **City** | Edinburgh | **Postcode** | EH11 ABC |

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | Barak Ali | **Home phone** | 0131 654321 |
| **Address** | 8 Leith Street  Leith | **Mobile phone** | 0747 123456 |
| **E-mail** barak@obama.co.uk | | | |
| **City** | Edinburgh | **Postcode** | EH12 ABC |

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | Jane Mackenzie | **Home phone** | 0131 111111 |
| **Address** | 12 Main Street  Leith | **Mobile phone** | 0746 123456 |
| **E-mail** jane@scotland.co.uk | | | |
| **City** | Edinburgh | **Postcode** | EH12 DEF |

(b) Insert a screenshot showing that the data has been added correctly (use the report showing all customers)

**Activity 3**

(a) Delete the client record for Barak Ali.

(b) Change the mobile number for Jane Mackenzie from 0746 123456 to 0741 654321.

(c) Insert a screenshot showing that the data has been removed and edited correctly (use the report showing all customers).

**Activity 4**

(a) Add the following contact call records using the form that you have created.

|  |  |  |  |
| --- | --- | --- | --- |
| Customer | Date | Category | Description |
| Aran Lee | 12/12/2012 | Telephone | Arranged meeting for 11/1/2013 to discuss policies. |
| Aran Lee | 11/1/2013 | Face-to- face | Client wanted new life policy |
| Aran Lee | 14/1/2013 | E-mail | Let client know policy has been accepted. |
| Charlie Brown | 12/12/2012 | Telephone | Unsuccessfully tried to make appointment to discuss policies. |

(b) Find and display the contact call records for Aran Lee.

(c) Insert a screenshot showing all of the call records for Aran Lee (use the report showing the contact records for a specific customer).