Cloud-based business manager is a website application that allow the users to save all their customers' details, create and edit marketing processes via a flowchart and keep track on each marking process step for the customers and groups.

There are six main pages, which are Home, Customer management, Group management, Marketing process management, Profile and Flowchart.

Home page shows all the marketing process step that all the customers need to finish recently, it also enables user to mark a marketing process step as done (Picture 1).



Picture 1. Home page

Customer management page let user add a customer, add customer to groups and marketing processes (Picture 2), and show all customer details (Picture 3). User can filter the customer by group (Picture 3). Customer management page also allows user to edit customer details (Picture 4) and delete customer (Picture 5).

Picture 2. Customer management page shows add customer function.



Picture 3. Customer management page shows customer details and filter function.



Picture 4. Customer management page shows edit customer function.

## Customer Record

Filter: [All groups ▾] [Submit]

| ID | First name | Last name | Company | Email | Phone | Notes | Marketing Process | Group | | | | |
|----|-----------|-----------|---------|-------|-------|-------|-------------------|-------|---|---|---|---|
| 1 | David | hui | UTAS | davidhui2047@gmail.com | 12321321 | | Individual: AAA Group: AAA BBB | web A.I. | Profile | ✏ | 🗑 | |
| 2 | Chloe | An | UTAS | chloean@gmail.com | 12345612 | | Individual: AAA Group: AAA | A.I. | Profile | ✏ | 🗑 | |
| 3 | Jason | Cheung | CUHK | jason@cuhk.edu.hk | 0232312 | He is in HK | Individual: AAA BBB Group: BBB | web | Profile | ✏ | 🗑 | Confirm |

[Add Customer]

Picture 5. Customer management page shows delete customer function.

Group management page let user input group and show all groups (Picture 6). It enables user to edit group name and delete a group. Group management page also allows user to add and delete user in a group.

## Group Record

| ID | Group name | | |
|----|-----------|---|---|
| 1 | web | ✏ | 🗑 |
| 2 | A.I. | ✏ | 🗑 |
| 3 | Gaming | ✏ | 🗑 |

[Group name]
[Add Group]

## Customer in Group Record

| ID | Customer | Group | |
|----|----------|-------|---|
| 3 | Chloe | A.I. | [Delete] |
| 2 | David | A.I. | [Delete] |
| 1 | David | web | [Delete] |
| 4 | Jason | web | [Delete] |

Add user into a group

[Select User ▾] [Select Group ▾] [Submit]
Chloe
David
Jason

Picture 6. Group management page

Marketing process management page let user add marketing process and show all marketing processes (Picture 7).   It enables user to edit marketing process name and delete a marketing process. Marketing process management page also allows user to add and delete individual and group enrolment.

### Marketing process record

| Marketing process ID | Marketing process name | | | |
|---|---|---|---|---|
| 1 | AAA | Flowchart | ✏ | 🗑 |
| 2 | BBB | Flowchart | ✏ | 🗑 |
| 3 | CCC | Flowchart | ✏ | 🗑 |
| 4 | DDD | Flowchart | ✏ | 🗑 |

[Marketing process name] [Add marketing process]

### Individual enrolment

| ID | Customer | Marketing process | |
|---|---|---|---|
| 1 | David | AAA | Delete |
| 2 | Chloe | AAA | Delete |
| 3 | Jason | AAA | Delete |
| 4 | Jason | BBB | Delete |

Add users into a marketing process
[Select User ▾] [Select marketing process ▾] [Submit]

### Group enrollment

| ID | Group | Marketing Process | |
|---|---|---|---|
| 3 | A.I. | AAA | Delete |
| 1 | web | BBB | Delete |

Add groups into a marketing process
[Select Group ▾] [Select marketing process ▾] [Submit]

Picture 7. Marketing process management page

Profile page show customer and marketing process step details (Picture 8). It enables user to mark a step as done and skip a step. Profile page also show the marketing process step that user need to do recently and the marketing process step that are done or skipped.



Picture 8. Profile page

Flowchart page show the old flowchart (Picture 9). It enables user to draw a flowchart for a marketing process.
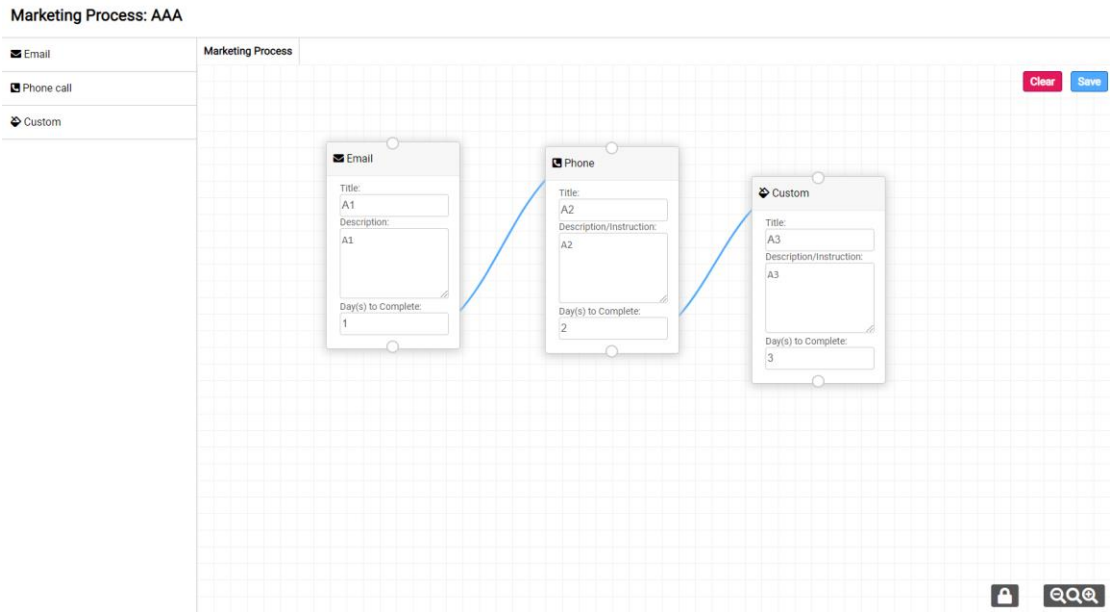


Picture 9. Flowchart page

For more information, please watch this demo video.