

Technical Task

▼ A-1 I can create and edit a customer

Create/Edit Household Customer

Name	Details	Actions
ID*	Auto Generated ID	Backend Create
First Name*	First Name	Create/Edit
Last Name*	Last Name	Create/Edit
Date of Birth*	Date of Birth	Create/Edit
Phone Number*	Phone Number	Create/Edit
Email*	Email	Create/Edit
Gender*	Gender	Create/Edit
Country*	Australia/New Zealand	Create/Edit
State*	A list of states depending on the country	Create/Edit
Address*	rest of the Address	Create/Edit
Lead Channel*	Social Media - Website - Sales	Create/Edit
Status	Customer - Sales - Technician - Edited Customer status by default upon creation	Edit Only

Authorization

Name	Details
User	Create and edit a customer

Policy

	Name
1	A customer ID is unique across the portal
2	A customer's email and phone number must be unique across the portal
3	A customers status can only become Edited through the editing of the customer

Validation

Name	Details	Message
Customer Created Successfully	The customer was created successfully	Customer Created Successfully
Customer Failed To Be Created	The customer failed to be created	Customer Failed To Be Created
"Field" Is Required	The name of the field that is required and has not been filled	"Field" Is Required
Policy: Email Is Not Unique	The email belongs to another customer on the system.	Policy Error: Email Is Not Unique

Policy: Phone Number Is Not Unique	This phone number belongs to another customer on the system	Policy Error: Phone Number Is Not Unique
Policy: Invalid status change to Customer	A customer cannot return to status Customer once it has changed	The customer status cannot become Customer
Policy: Invalid status change to Sales	The customers status can only become Sales through assigning	The customers status cannot become Sales
Policy: Invalid status change to Technician	The customers status can only become Technician through assigning	The customers status cannot become Technician

Redirection

Once the user creates the customer, they are redirected to the detailed view of the customer

Once the user edits the customer, they are redirected to the detailed view of the customer

User Can delete from Edit view

User Can assign/remove from Edit view

Note:

If country is Australia then state has to be [New South Wales, Queensland, South Australia, Tasmania, Victoria, Western Australia]

If New Zealand

[Gisborne, Northland, Manawatu-Whanganui ,Hawke's Bay, West Coast ,Bay of Plenty,Southland,Waikato,Tasman,Marlborough,Taranaki, Otago,Canterbury,Auckland,Wellington]

▼ [A-2 I can view a customer](#)

Household Customer

Name	Details
Customer ID	ID
First Name	First Name
Last Name	Last Name
Date of Birth	Date of Birth
Phone Number	Phone Number
Email	Email
Gender	Gender
Country	Australia/New Zealand
State	the state list
Address	rest of the Address
Lead Channel	Social Media - Website - Sales
Date Created	Date the customer was created
Date Edited	Date the status became Edited
Date Sales	Date status became Sales
Date Technician	Date status became Technician
Status	Customer - Edited - Sales - Technician
Type	Industrial - Household

Authorization

Name	Detail
User	I can view all customers

Redirection

User Can Add New customers from list view

User can delete customer from detailed view

▼ A-3 I can delete a customer

Authorization

Name	Details
User	I can delete a customer

Policy

	Name
1	A customer cannot be deleted unless they are Customer, or Sales status

Validation

Name	Details	Message
Customer Deleted Successfully	Customer Deleted Successfully	Customer Deleted Successfully
Customer Failed To Be Deleted	Customer Failed To Be Deleted	Customer Failed To Be Deleted
Policy :Customer Status Must Be Customer or Sales	Policy Error: Customer Status Must Be Lost, Lead, Or Customer	Policy Error: Customer Status Must Be Customer or Sales

Redirection

Once the user deletes a customer, they are redirected to the list view of customers

▼ A-4 I Can assign/remove a sales or technician status to a customer

Authorization

Name	Details
User	I can assign and remove a sales or technician to a customer

Validations

Name	Details	Message
Employee Assigned Successfully	Employee Assigned Successfully	Employee Assigned Successfully
Employee Failed To Be Assigned	Employee Failed To Be Assigned	Employee Failed To Be Assigned
Employee Removed Successfully	Employee Removed Successfully	Employee Removed Successfully

Employee Failed To Be Removed	Employee Failed To Be Removed	Employee Failed To Be Removed
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