

## CLIENT MEETING NOTE

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### **JUNE 7TH, 2021**

#### CRM - Customer Relationship Management

##### Non-negotiable:

- client-server / over IP
  - CRM server
    - Process CRM operations and provide results of operations to application user
  - CRM client
    - Privilege-based access to system
  - Different user levels
    - admin - Can do anything
    - user - Can't change things but can access specific data
    - manager - Import/change records
  - Data storage
    - Not the core element of the project (can be excessive/hectic to work on)
    - Roll own database (design own database - don't replace SQL, basic stuff), cannot be pre-rolled

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### **JUNE 9TH, 2021**

##### What it does / not does

- Build a platform that can be used to reach out and maintain relationships with customers
- Many users to use organization to manage different types of relationships and clients
- Lots of records for lots of clients
  - Record example: Fname, Lname, address, phone number
  - Organization records
  - Client records
  - User information/records
  - Customer records are not associative or bound by any sales person
    - Customer chris smith is not defined by the sales person
- Sales people
- Create groups of customers
  - Grouping does not affect anything - just a custom way to order groups/collections of customers
    - Salesmen A has "favorites" group that

- username/password
  - Look into message passing example (objectstream week 2 code example) session based
  - Server needs to keep track of session lifetime (session active?) keep basic

CRM APPLICATION - FOCUSED ON THE CUSTOMERS AND USERS.

**Question: What information should the customer/user contain?**

SERVER:

- Keep it simple and not devote too much time.
- Back-end server processing, which stores the CRM data.
  - **Records**, which holds
    - Company
    - Users
    - Sales

CLIENT:

- The interaction is done using a JAVA GUI. (Not the web-form for which we're expecting).
  - **Login** to system
    - Check customers records
      - Contacts
      - Notes
- Client should be able to modify their information
  - Like what?
  - Remove customers...
  - Notes
- Privileged permission for users?
  - Able to read and modify all records
  - Data Migration
  - ?

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**JUNE 14TH, 2021**

- User logs in (username and password)
- Empty CRM
  - So add users (sales people - Sales)
  - Add customers
  - Adds customer records, delete customer records, edit
  - Search records
- Sales adds customer records (CRUD)

- Search record
- Give reports (based on timestamps - least contacted, most contacted, most engagements - frequency of contact)
- Calendar (Goodie)
- Call (Goodie)
- Group customers
- Import / export
- 3 levels of users (so far) Admin (IT level, Not a user), Manager, User
  - Admins creates users
  - Managers have Users under them, can add new associates
  - Sales person has records, group records, access records, cannot touch other user accounts/groups
- Persistence (saving everything)
  - Custom storage implementation

### Questions:

- **Would users have the ability to login themselves?**
- **How much information should we expect each user to have?**
- **What should the customer be able to do?**
- **How do we send info?**
- **Authentication for each user?**

Visually

SALESFORCE:

COMPANY: CSUEB

USERS: XYZ

SALES: SMITH

GROUP OF SMITHS CUSTOMERS

SALES: GEORGE

GROUP OF GEORGES CUSTOMERS

Note: **USER LOGIN -> XYZ PRIVLAGES BY XYZ COMPANY**

CRM IS DEPLOYED: CUSTOMER RECORDS.  
ORIENTED TOWARDS SALES.

SHUT DOWN THE APPLICATION DOWN AND HAVE UP-TO DATE DATA.  
[DVD APPLICATION EXAMPLE]

RECORD -> TOSTRING -> INTO FILE  
FILE WOULD HAVE AN ORGANIZED TABLE...  
SAVING TO DISK ALL RECORDS TO FILE...

**(COMPANY) ADMIN USER (IT PERHAPS):**

- LOGIN.
- CREATE USERS LOGINS.
- ADD USERS TO RECORDS.
- REMOVE USER RECORDS.
- SEARCH
- EDIT USERS

**MANAGER USER (HAS EMPLOYEES):**

- CUSTOMERS
- ADD SALES RECORDS

**SALES USER:**

- IMPORT/EXPORT THEIR OWN GROUPINGS.
- ACCESS.
- ADD CUSTOMERS.
- SEARCH.

**GROUPING:**

- CATEGORIES
- SALES

**PURPOSE BUT DON'T IMPLEMENT:**

- BE ABLE TO PRODUCE REPORTS.
- CALENDAR
- PHONE CALL