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TECHNICAL WRITING



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PROJECT OVERVIEW



The Django Customer Relationship Management System is a web-based application that aims to streamline and automate customer interactions for businesses. It allows users to manage customer data, track leads, monitor sales activities, and provide better customer support.



The system provides a centralized platform for storing customer information, managing communication history, and generating reports for analysis.



KEY FEATURES

Customer Management:

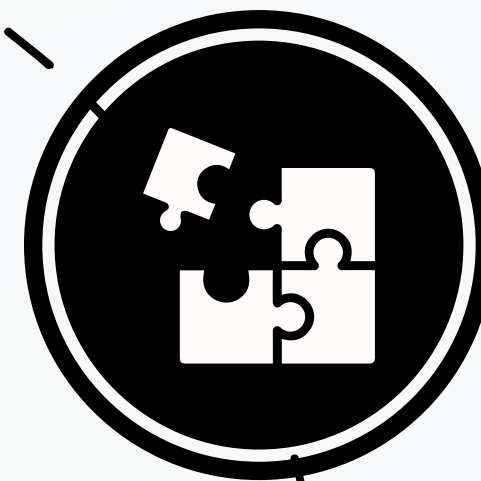
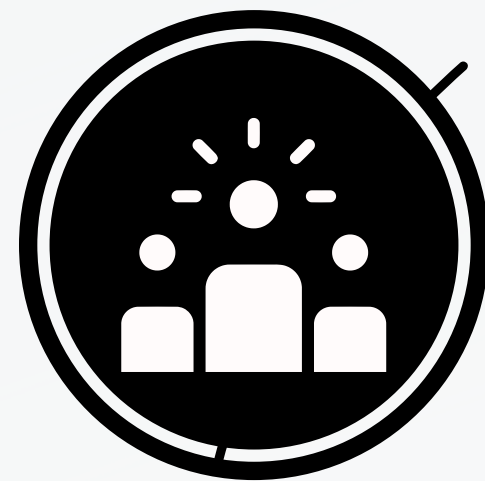
Users can add, edit, and delete customer records, including contact details, addresses, and custom fields.

Lead Tracking:

The system enables users to track leads, assign them to sales representatives, and monitor their progress through the sales funnel.

Communication History:

Users can log and view all interactions with customers, such as phone calls, emails, meetings, and notes.



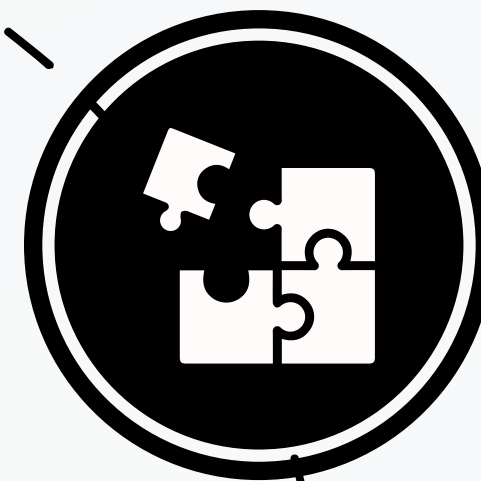
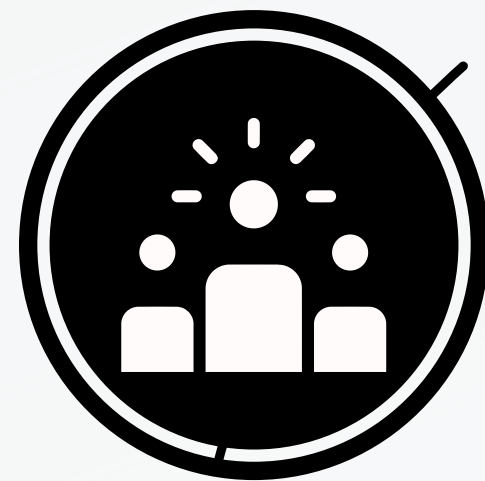
KEY FEATURES

Task Management:

The system allows users to create and assign tasks related to customers, such as follow-ups, appointments, and reminders.

Sales Analytics:

Users can generate reports and visualize data related to sales performance, customer acquisition, and lead conversion rates.



TECHNOLOGY STACK

Python

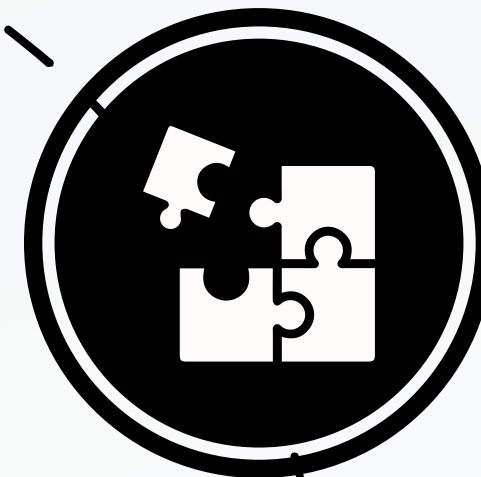
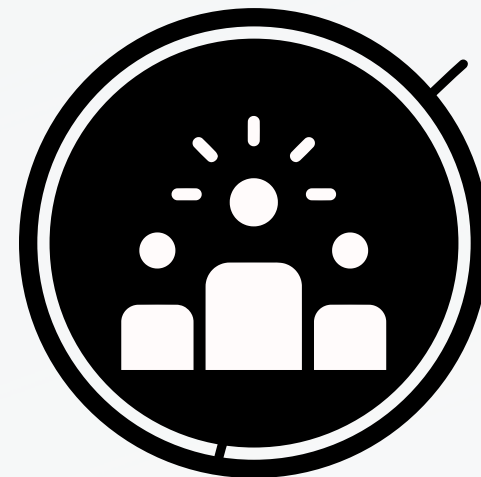
Django

JavaScript

Django REST Framework

HTML/CSS

PostgreSQL



SYSTEM ARCHITECTURE

Models:

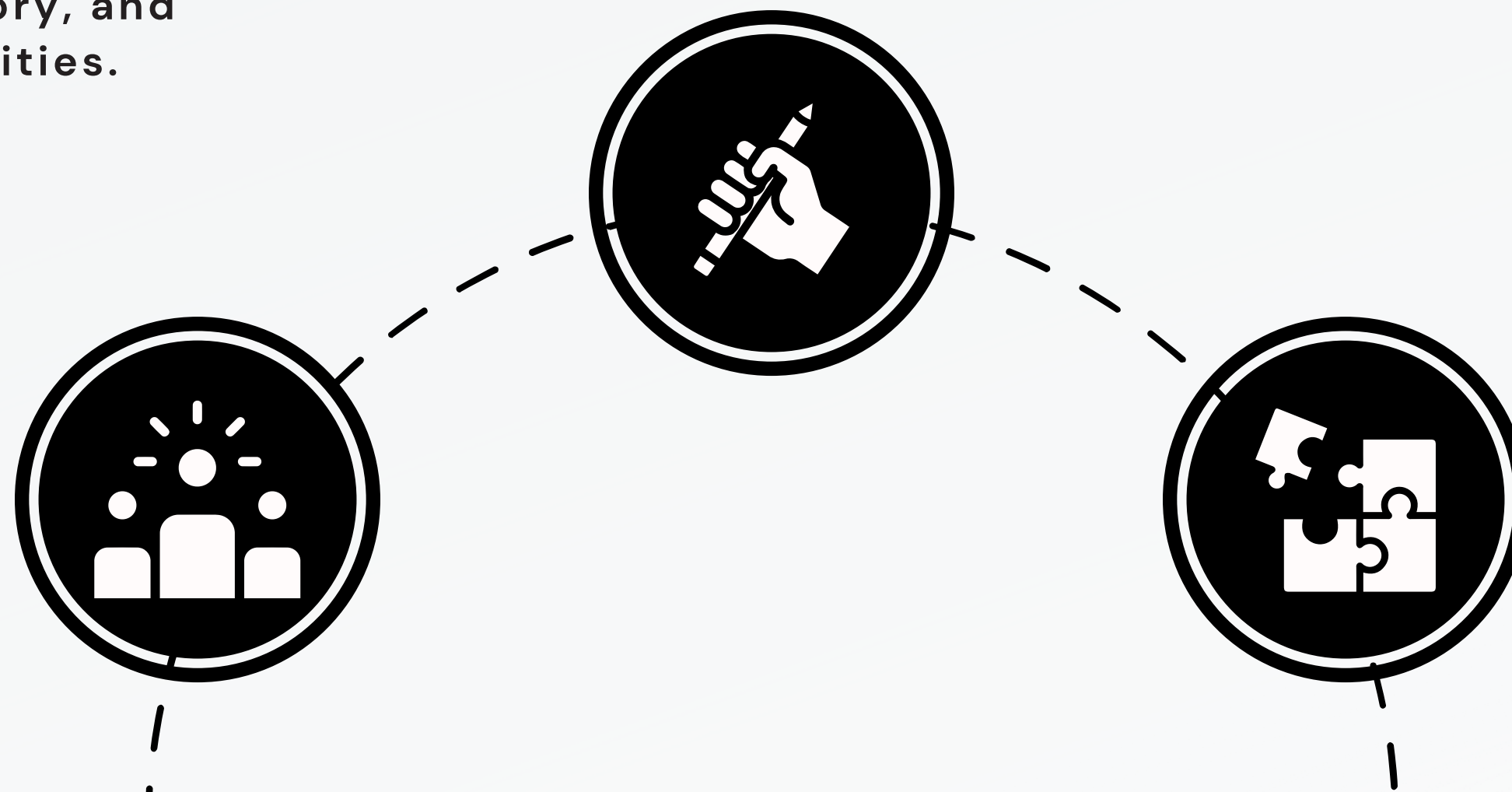
Define the data structures and relationships, representing customer information, leads, communication history, and other relevant entities.

Views:

Handle user requests, interact with the models, and render appropriate responses.

Templates:

Provide HTML templates to generate dynamic web pages, incorporating data from views.



DATABASE DESIGN

Customer:

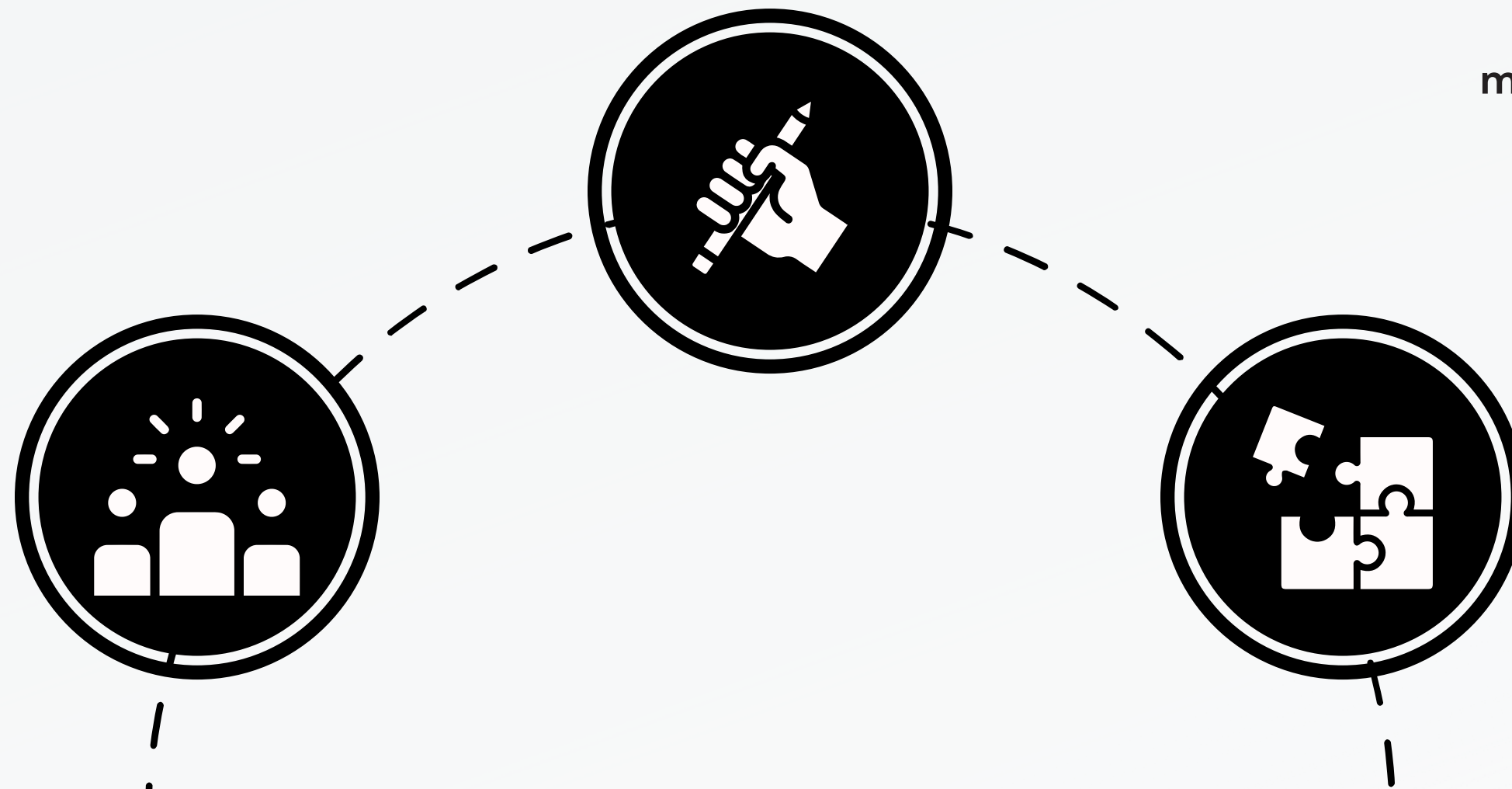
Stores customer information, including contact details, addresses, and custom fields.

Lead:

Tracks lead details, such as source, status, assigned sales representative, and conversion status.

Communication:

Logs all communication activities related to customers, including calls, emails, meetings, and notes.



USER AUTHENTICATION AND AUTHORIZATION

Authentication



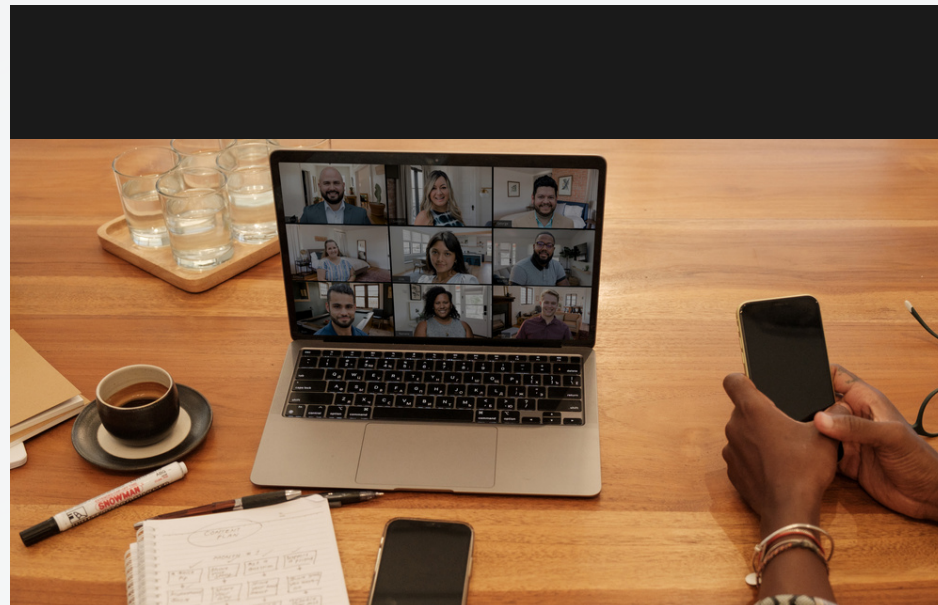
- The CRM system incorporates user authentication and authorization mechanisms to ensure secure access
- to the application. Django's built-in authentication system is used to handle user registration, login, and session management.

- User roles and permissions are implemented using Django's authorization framework. Roles, such as administrators, sales representatives, and support staff, can be assigned specific permissions based on their responsibilities.

Authorization



CONCLUSION



This technical document provided an overview of the Django Customer Relationship Management System, its key features, the technology stack used, and the implementation details.

With this information, developers can effectively build and deploy a CRM system using Django, enabling businesses to manage customer interactions, track leads, and improve customer satisfaction.

