

Customer: Richards Roof Repairs

Calendar Maps Contacts Quotes Websites Jobs

Save and Return Save Delete Cancel

**Company Information** help

Company ☒ Grace Advertising

**Customer Information**

Name Richards Roof Repair \*

Type Customer

Logo Add New

[more fields »](#)

**Primary Contact Details** More

First Name Contact richards \*

## Jobs description overview

1. Customer new features
  - A. add more standard fields in Customer information section
  - B. add new function : customer category
  - C. add new section : customer affiliates
2. Customer's contact new features
  - A. add more standard field in contact details
  - B. add new section : contact affairs
3. Company new features
  - A. add more standard fields in Company Details section

## A.source code & site testing

test site: <http://ucmtest.grace-it.com>

login user: admin@example.com ciRohZUvD0

script source code: <http://ucmtest.grace-it.com/ucmscript.rar>

script documentation /Wiki

<http://ultimateclientmanager.com/support/documentation-wiki/>

you can test the script on you own server

## B. Job requirement

1. You must using the oringinal framework to extend the new features.
2. The Revised PHP files need Commented Markup.
3. New features & database
  - A. design & structure document
  - B. Database and files definitions
  - C. Logical data model(relational) and physical files and database design(Files and databases)
  - D. Logical Flowcharting
  - E. Process modeling (DFDs.)
  - F. ER diagrams with attributes
  - G. UML of activities and object models.
4. After complete the jobs, you need zip the following files to us,
  - A. the revised PHP files alone.
  - B. SQL files
    - alter table xxx (revised the existing table)
    - create table (create a brandnew table)
    - insert table (insert a new pre-input data)
5. when you do the new feature , please keep on mind there must suitable to the language framework, the new features caption can make the translation on the setting

Language and Translations

Add New Language

System Settings
Users
Newsletters
User Roles
Calendar
Customers
Company
Maps
Help
Currency
Invoices
Custom Data
Ticket
Social
Templates
Finance
FAQ
Backups

Subscriptions
Products
Login History
Email
Groups
Theme
Extra Fields
PDF
Language
Menu
Payments
Upgrade
Advanced

| Language Code | Language Name |
|---------------|---------------|
| en (default)  | en            |

Default language to use throughout the system

en ?

Reset the language database/translations ? [Reset All](#)

Remove duplicate words ? [Remove](#) [Duplicate](#)

Save settings

| Translation        |                    |
|--------------------|--------------------|
| - Account -        | - Account -        |
| - Category -       | - Category -       |
| - Choose -         | - Choose -         |
| - Company -        | - Company -        |
| - Create New -     | - Create New -     |
| - Customer Group - | - Customer Group - |

..
..
-
..

# Part 1 Customer new features

## A. add more standard field in Customer information section

| field                 |   |
|-----------------------|---|
| Customer ID           | <b>GAD 23012</b><br>Prefix: <b>GAD</b> setting from company<br>number start from <b>23000</b> serial number |
| Begin Contact Date    | date+time   |
| Found Date            | only date   |
| Anniversary Date      | only date   |
| Fax                   |   |
| Phone 1 caption value |   |
| Phone 2 phone value   |   |
| email 1 caption value |   |
| email 1 value         |   |
| email 2 caption value |   |
| email 2 value         |   |
| email 3 caption value |   |
| email 3 value         |   |
| path                  |   |
| category              | multiple choice, some category need to pre input<br>there is 3 level category                               |
| website               |   |
| facebook page         |   |
| weibo page            |   |
| gc link               |   |
| wechat id             |   |
| whatapp ID            |   |
| QQ                    |   |
| status                |   |
| Collapse Date         | only date   |
| remarks               |   |

hidden field , I don't know the original database has that field or not, if not ,please add a new one and function it.

create date (date+time)

edit date (date+time)

something like that:

Customer Information

Customer ID

GAD 23012

Name

Richards Roof Repairs

Logo

Add new Logo

Type

Customer

Begin Contact Date

2016-05-22 15:19:48

Found Date

1990-05-22

Anniversary Date

1990-05-22

Fax

Phone 1

caption

main

phone

89672133

Phone 2

caption

option

email

89876232

Email 1

caption

public email

email

info@abc.com

Email 2

caption

recruit email

email

hr@abc.com

Email 3

caption

tender email

email

tender@abc.com

path

more fields »

Remarks

multiple choice

Category

+ ☐ SME

- ☐ EDU

- ☒ Kindergartens

- ☐ Primary Schools

- ☐ Secondary Schools

+ ☐ ORG

+ ☐ GOV

+ ☐ PER

Website

facebook page

weibo page

gc link

wechat ID

whatsapp ID

QQ

Status

☐ Operation ☐ Collapse

Collapse Date

The category can make the multiple choice, when click “+” that will browse the sub level category. A company may belong to more than one industry. You can suggest a good layout to satisfy the multiple category function.

## multiple choice

Category

+ ☐ SME

- ☐ EDU

- ☒ Kindergartens

- ☐ Primary Schools

- ☐ Secondary Schools

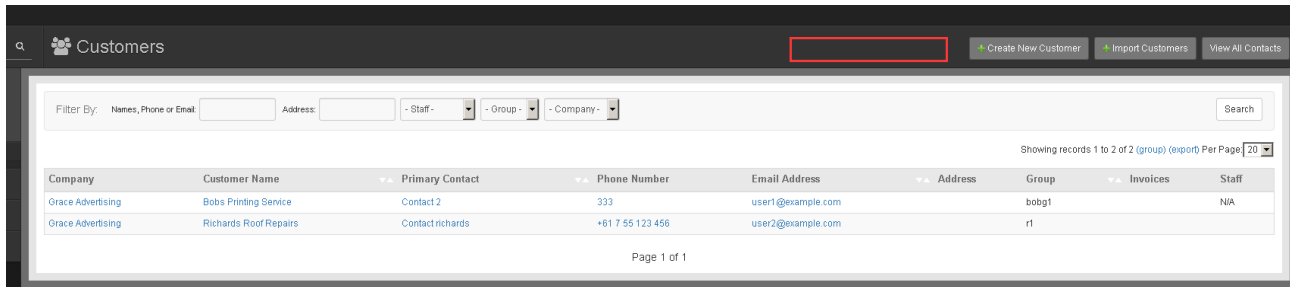
+ ☐ ORG

+ ☐ GOV

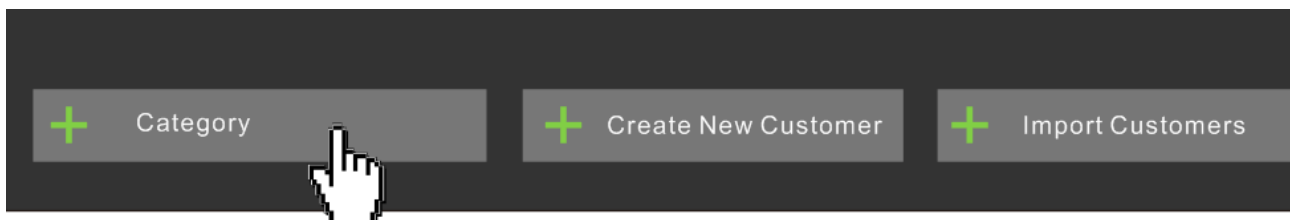
+ ☐ PER

## B.Add new function : customer category

Please check the excel file: business\_category.xls, the data need to be pre-input, or import into system.



at the top customer page , add new button to it call: add new button called Category



something like that, add unlimited level category, when click the button 【category】 ,that will show a listing page,add new category+ batch selecting



when listing the category, that can show out how many company that assign to.

add & edit

Save and Return

Save

Delete

Cancel

Category Information

Category name

Parent

---None ---

Sort Order

1

Dropdown list

SME  
SME> Travel  
SME> Travel>Agency  
EDU  
EDU> Primary Schools  
ORG  
ORG> Clubs

### c. add new section : Customer Affillates

When input the keywords there will dropdown a list which contain the keywords, there will list out the customer data from the database

Affiliates

a1  
a1 food company  
a1 car company  
a1 drink company

## Customer Affiliates

### Affiliates

new Affiliates

x a1 company

x a2 company

x a3 company

If a1 company is choose from the list that will show out below the input text field, you can cancel it by click “x”.

When you click to the “a1 company” , that will go to the a1 company information page. At a1 company’s affiliates will show out which add it to the customer affiliates section, that will show each other when one is added to the customer affiliates.

There are no limited by adding the customer customer affiliates.



x a1 company

x a2 company

x a3 company



When you mouse over the “a1 compnay”, that will show the star, when you click the star, that will change the red colour, that means a1 company is the main company. when click the red star agin, that star will disappear, and cancel the main company.



x a1 company

x a2 company

x a3 company



## Part 2.Customer's contact new feature

### A. add more standard field in contact details

Contact Details

Contact ID

GAD23012-1

First Name

John

Last Name

Wong

Birthday Date

1978-05-22

Begin Contact Date

2016-05-22 15:19:48

Status

☐ working ☐ resignation

resignation Date

Nick Name

Superman

Gender

☐ Male ☐ Female

Department

new depart.

Position

facebook page

weibo page

gc link

wechat ID

wechat ID

QQ

whatapps

Add photo

caption

email

Phone 1

main

89672133

Phone 2

direct

89672133

Mobile

personal

69898723

Email 1

office email

john-wong@abc.com

Email 2

personalemail

john@gmail.com

Email 3

personalemail

john@yahoo.com

[more fields »](#)

Remarks

Department

the department similar to the customer groups,

**Customer Groups**

☒ bobg1

☐ r1

☐

but different from the customer groups,

the different costumers can choose the groups each other

but the department is unique one for that customer, because the different company have different department name, they can not use each other

|                       |   |
|-----------------------|---|
| field                 |   |
| Contact ID            | <b>GAD 23012-1</b><br><b>GAD 23012</b> that from the customer id<br>-1 serial number  |
| Nick Name             |   |
| Gender                |   |
| Add photo             |   |
| Birthday Date         | date  |
| Begin Contact Date    | date+time   |
| Status                |   |
| resignation Date      | date, only resign the current company"eg.Richards Roof Repairs.",<br>the affaires do not take effect when he resign from one company.<br>The regined contact do dot disappear from the contact list, the text<br>colour will become grey, which different from the operation contacts |
| Phone 1 caption value |   |
| Phone 2 phone value   |   |
| email 1 caption value |   |
| email 1 value         |   |
| email 2 caption value |   |
| email 2 value         |   |
| email 3 caption value |   |
| email 3 value         |   |
| website               |   |
| facebook page         |   |
| weibo page            |   |
| gc link               |   |
| wechat id             |   |
| whatapp ID            |   |
| QQ                    |   |
| remarks               |   |
| department            |   |
| position              |   |
| affaires              |   |

hidden field , I don't know the original database has that field or not, if not ,please add a new one and function it.

create date (date+time)

edit date (date+time)

## B. add new section : Contact affairs

Affairs

new Affairs

x good football club

x invention association

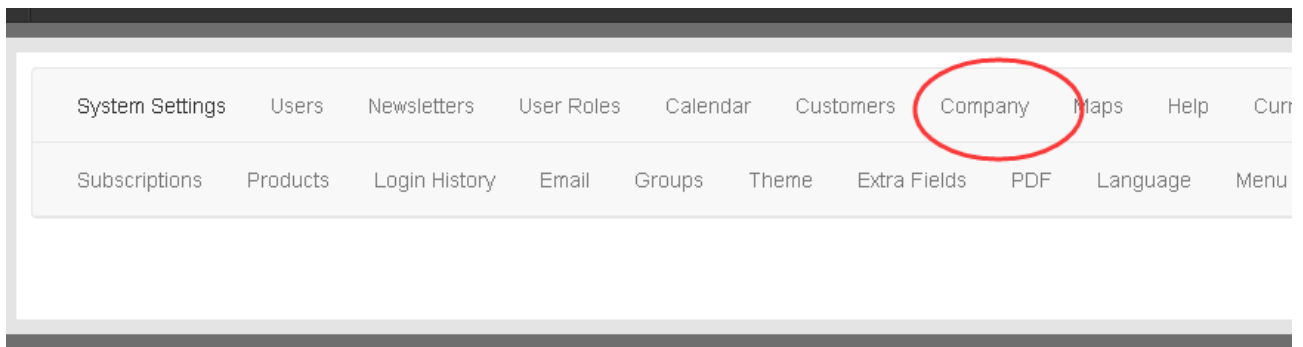
x x 1 company

1 contact person from a company, may be other association contact person.

## Part 3 Company new features

### A. add more standard field in Company Details section

setting→company



different company have different information data, multi-store concept.

## Company Details

|                    |  |               |                      |
|--------------------|--|---------------|----------------------|
| Company Name       | <input type="text" value="Grace Advertising"/> | Website       | <input type="text"/> |
| Logo               | <input type="button" value="Add new Logo"/>    | facebook page | <input type="text"/> |
| Customer ID Prefix | <input type="text"/>                           | weibo page    | <input type="text"/> |
| Quotation Prefix   | <input type="text"/>                           | wechat ID     | <input type="text"/> |
| Invoice Prefix     | <input type="text"/>                           | whatapp ID    | <input type="text"/> |
| Fax                | <input type="text"/>                           | QQ            | <input type="text"/> |
| Phone              | <input type="text" value="89672133"/>          | Bank Account  | <input type="text"/> |
| Phone 2            | <input type="text" value="89672134"/>          |               |                      |
| Mobile             | <input type="text" value="89876232"/>          |               |                      |
| Email 1            | <input type="text" value="info@abc.com"/>      |               |                      |
| Address            | <input type="text"/>                           |               |                      |

[more fields »](#)

Remarks

|                    |  |
|--------------------|--|
| field              |  |
| Logo               |  |
| Customer ID Prefix |  |
| Quotation Prefix   |  |
| Invoice Prefix     |  |
| Fax                |  |
| Phone              |  |
| Phone 2            |  |
| Mobile             |  |
| Email              |  |
| Address            |  |
| Website            |  |
| facebook page      |  |
| weibo page         |  |
| wechat ID          |  |
| whatapp ID         |  |
| QQ                 |  |
| Bank Account       |  |

hidden field , I don't know the original database has that field or not, if not ,please add a new one and function it.

create date (date+time)

edit date (date+time)

## Part 4: Additional information

### A.time calendar

|                    |  |   |
|--------------------|--|---|
| Begin Contact Date | <input type="text" value="2016-05-22 15:19:48"/> |  |
| Found Date         | <input type="text" value="1990-05-22"/>          |  |
| Anniversary Date   | <input type="text" value="1990-05-22"/>          |  |

when click the time icon that will drop out a tiny calendar

have time calendar

2016

July

|    |    |    |    |    |    |    |
|----|----|----|----|----|----|----|
| 日  | 一  | 二  | 三  | 四  | 五  | 六  |
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 |    |    |    |    |

hrs  min  sec

no time calendar

2016

July

|    |    |    |    |    |    |    |
|----|----|----|----|----|----|----|
| 日  | 一  | 二  | 三  | 四  | 五  | 六  |
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 |    |    |    |    |