

Customer and Accounts Management Web App

User Guide 2025

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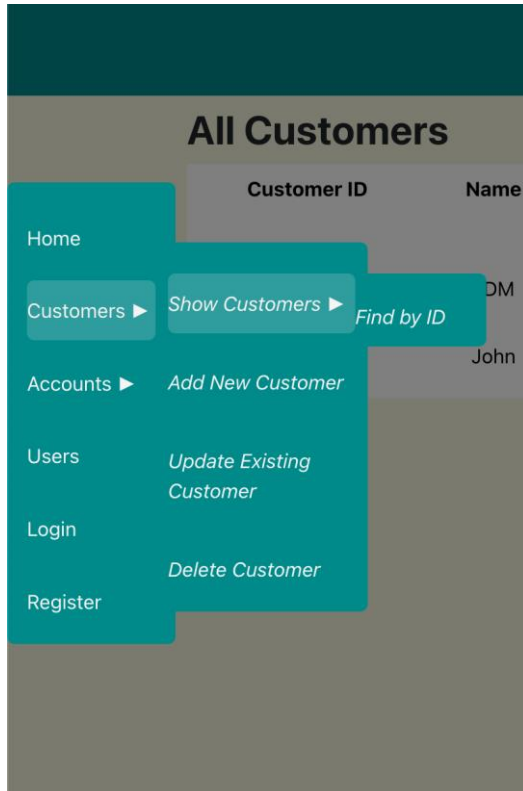
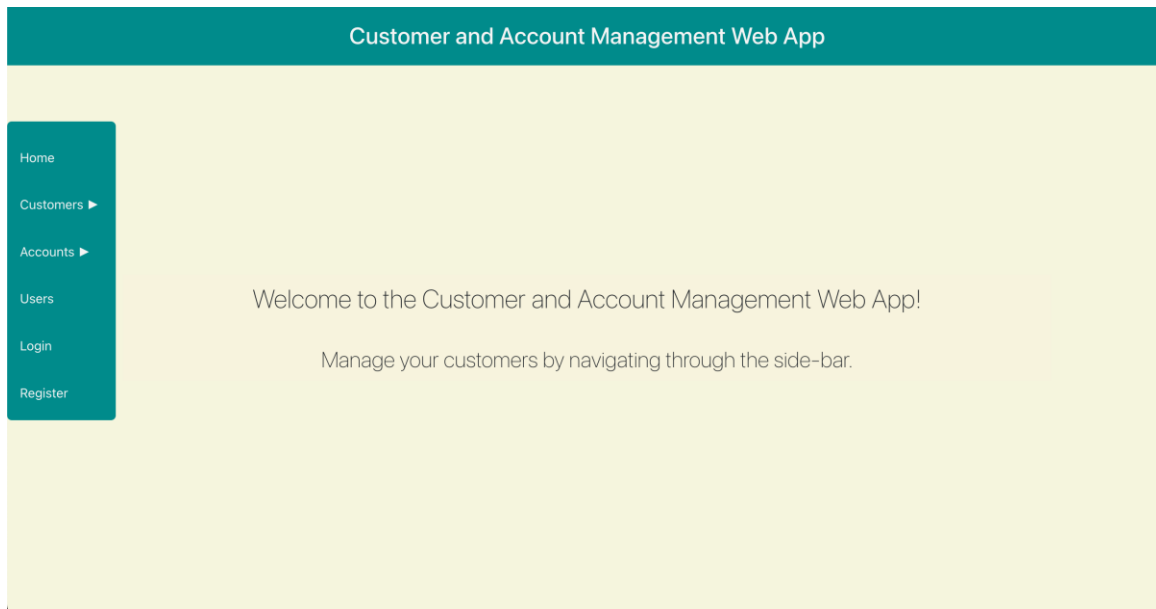
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Getting started

Home page

When you first launch the web app, you get taken to the Home Page.



You can navigate through the application through the sidebar. The tabs with a white triangle contain a drop-down menu with more options. This sidebar is accessible on every page, so you can access any functionality from anywhere.

Register

As a new user, you will need to register an account. The “Register” tab is at the end of the sidebar.

The screenshot shows the 'Register' page of the 'Customer and Account Management Web App'. On the left is a teal sidebar with navigation links: Home, Customers, Accounts, Users, Login, and Register. The 'Register' link is circled in red. The main content area has a light yellow background and is titled 'Register'. It contains a white registration form with the heading 'Don't have an account? Register below.' The form has two input fields: 'Create a username:' with a placeholder 'Ex: caleb.mcintyre' and 'Create your password:'. Below these fields is a teal 'Register' button.

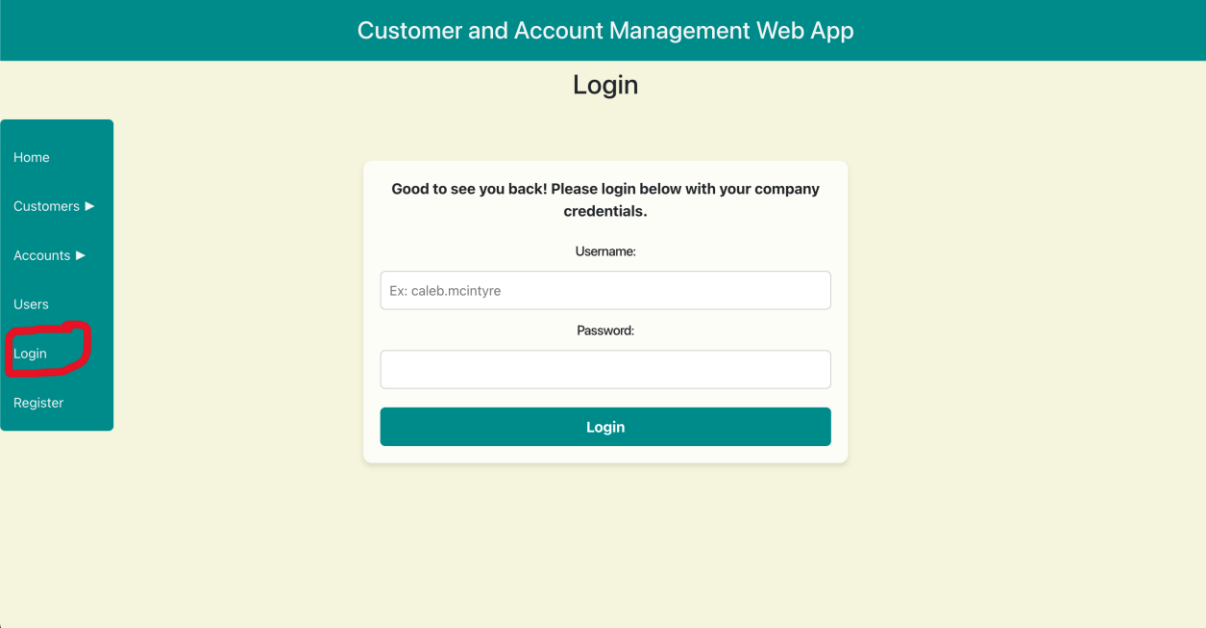
After creating a username and password, click on the “Register” button, and it will redirect you to the Users page with a list of all registered users.

The screenshot shows the 'Registered Users' page of the 'Customer and Account Management Web App'. The sidebar on the left is the same as in the previous screenshot, but the 'Register' link is no longer circled. The main content area is titled 'Registered Users' and displays a table of registered users.

User ID	Username
1	caleb.mcintyre
2	marie93
3	kieran.mcclean
4	hello.world

Log-in

The “Login” tab is right above the “Register” tab. Clicking on it brings you to the Login page, where you can enter your username and password.



The screenshot shows the 'Customer and Account Management Web App' interface. On the left is a teal sidebar with navigation links: Home, Customers, Accounts, Users, Login, and Register. The 'Login' link is highlighted with a red rectangle. The main content area has a light yellow background and is titled 'Login'. It features a white login form with the message: 'Good to see you back! Please login below with your company credentials.' The form includes a 'Username:' label, a text input field with the placeholder 'Ex: caleb.mcintyre', a 'Password:' label, another text input field, and a teal 'Login' button at the bottom.

After logging in, you will be redirected to the Home Page.

Customer management

View all customers

Clicking on the “Customers” tab allows you to view all customers.

Customer and Account Management Web App

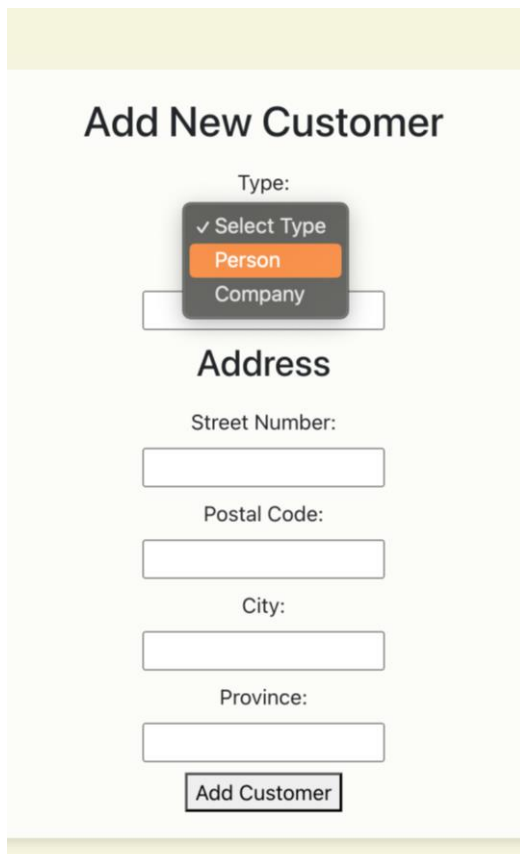
All Customers

Customer ID	Name	Address				Actions
		Street	City	Province	Postal code	
1001	FDM	13 Kenworth Street	Toronto	Ontario	T3R 3E3	<button>Update</button>
1002	John	2 Queen Street	Caledon	Ontario	R4J 6Y6	<button>Update</button>

Add Customer

The “Add Customer” button brings you to a page to add a new customer.

Add a new customer



Add New Customer

Type:

✓ Select Type

Person

Company

Address

Street Number:

Postal Code:

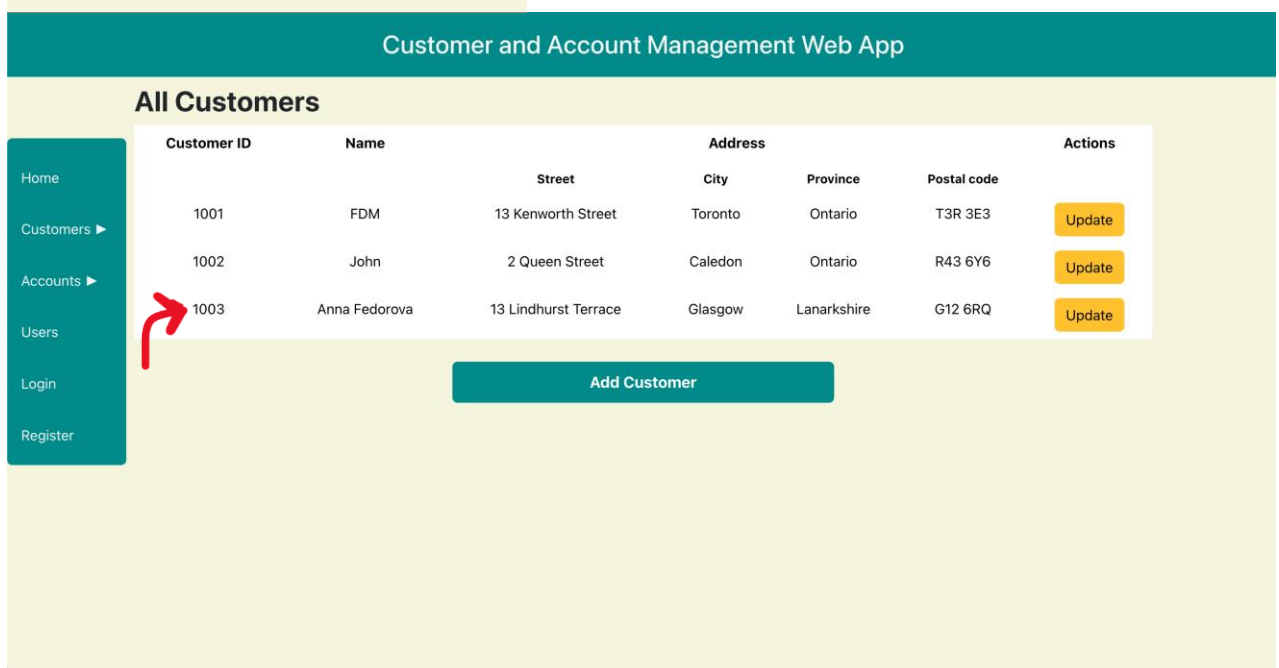
City:

Province:

Add Customer

Here is a zoom-in of the Add Customer page. The type of customer can be selected from a dropdown bar. After you've entered the customer's details, click on the "Add Customer" button.

After submitting the new customer details, you will get redirected to view all customers, with a new customer added.



Customer and Account Management Web App

All Customers

Customer ID	Name	Address				Actions
		Street	City	Province	Postal code	
1001	FDM	13 Kenworth Street	Toronto	Ontario	T3R 3E3	<button>Update</button>
1002	John	2 Queen Street	Caledon	Ontario	R43 6Y6	<button>Update</button>
1003	Anna Fedorova	13 Lindhurst Terrace	Glasgow	Lanarkshire	G12 6RQ	<button>Update</button>

Add Customer

Update customer details

Web App

Interest rate / %	Actions
4.5	<button>Update</button>
4.6	<button>Update</button>
n/a	<button>Update</button>

Each customer has a quick-action “Update” button that brings you to the Update Customer page.

The fields for customer ID and customer name are auto-filled to the customer you decided to update.

Customer and Account Management Web App

Home
Customers ▶
Accounts ▶
Users
Login
Register

Update Existing Customer

Enter current customer ID:

Edit customer name:

Edit customer address:

Street number:

Postal code:

City:

Province:

After updating your desired details, scroll down to submit the information.

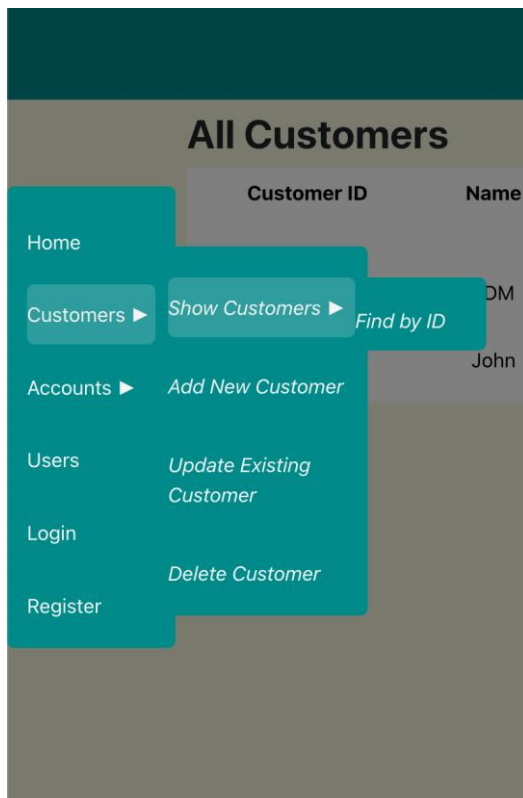
Postal code:

City:

Province:

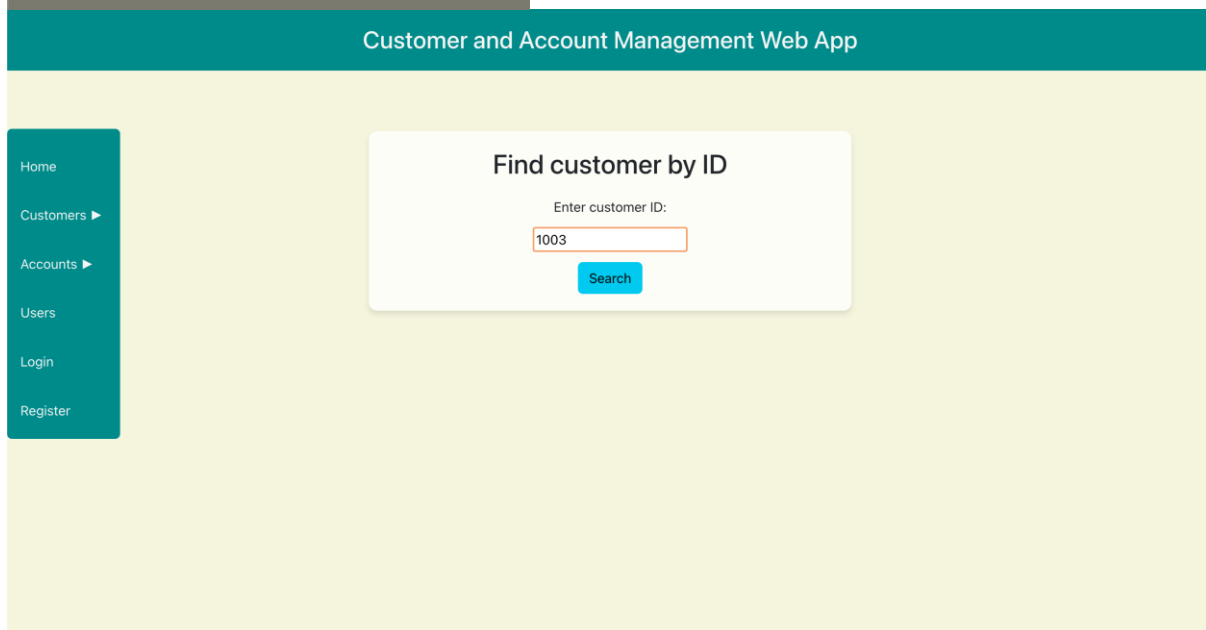
Submit

Find customer by ID

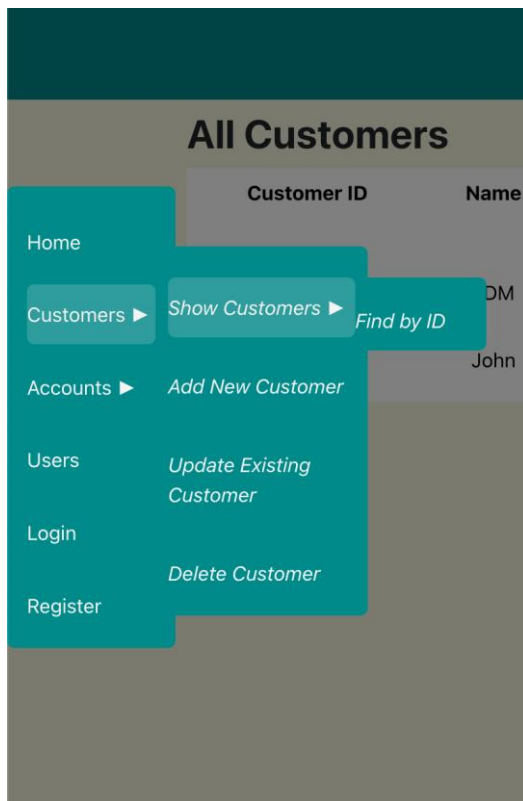


Find a customer by their ID by navigating to the Find By ID page.

Enter the ID of the customer and press “Search”.

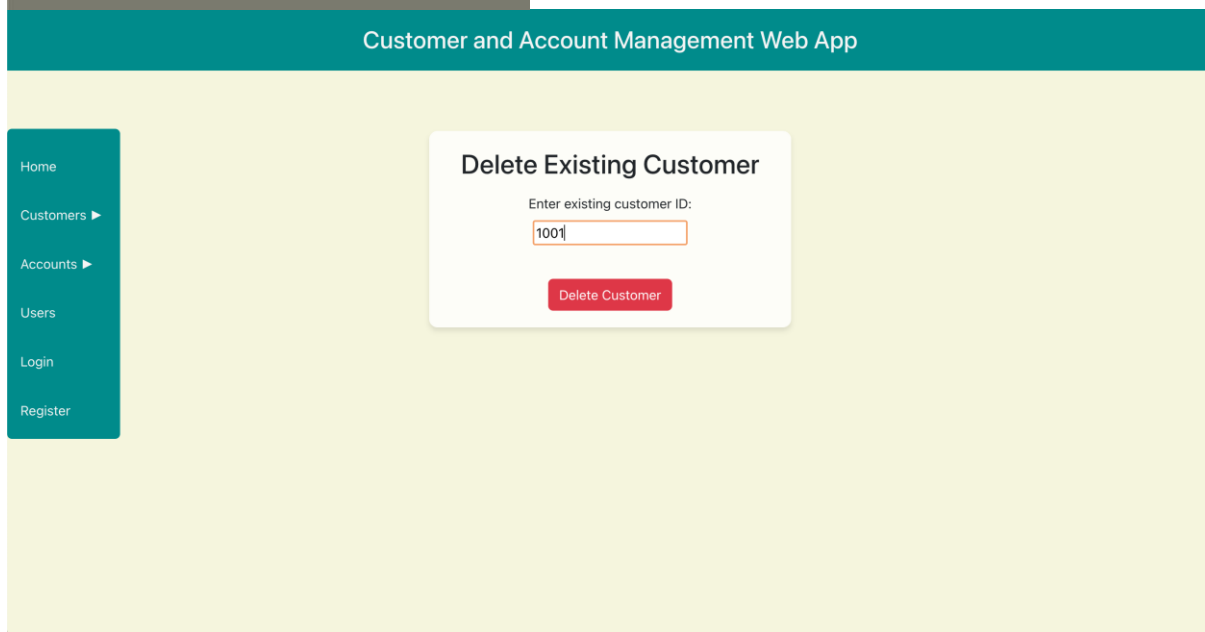


Delete a customer



Unlike the Update function, there is no quick-action for deletion, to avoid deleting a customer by mistake. Instead, navigate to the Delete Customer page from the sidebar.

The Delete Customer page will open. Enter the customer ID to confirm deletion.



Account management

View all accounts

To view all accounts, click the “Accounts” tab.

Add account

If no accounts are found, create an account by clicking the ”Add Account button”.

The screenshot shows the 'All Accounts' page of the 'Customer and Account Management Web App'. On the left is a teal sidebar with navigation links: Home, Customers ►, Accounts ►, Users, Login, and Register. The main content area has a title 'All Accounts' and a table with columns: Account ID, Account type, Account balance / £, Interest rate / %, and Actions. A teal 'Add Account' button is positioned below the table header.

Account ID	Account type	Account balance / £	Interest rate / %	Actions
------------	--------------	---------------------	-------------------	---------

You will be redirected to the Add Account page.

The screenshot shows the 'Add New Account' page of the 'Customer and Account Management Web App'. The sidebar is identical to the previous page. The main content area features a form with the following fields: 'Enter customer ID:' with the value '1003', 'Account Type:' with a dropdown menu showing 'Select Type', 'Checking', and 'Savings' (the selected option), 'Set Balance:' with an empty input field, and 'Set Interest Rate:' with the value 'If applicable'. A blue 'Submit' button is at the bottom of the form.

Add New Account

Enter customer ID: 1003

Account Type: ✓ Select Type
Checking
Savings

Set Balance:

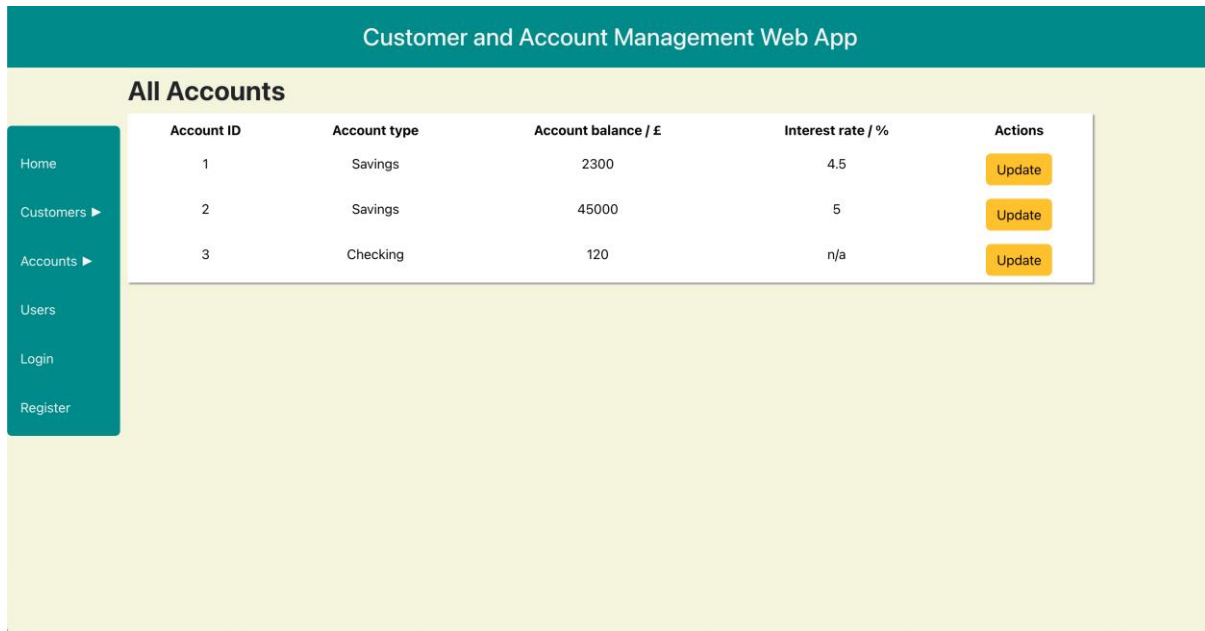
Set Interest Rate: If applicable

Submit

After entering the account details, click submit, and you will be redirected back to view all accounts.

Update Account

Quick actions to Update the account are provided by the yellow button.



Customer and Account Management Web App

All Accounts

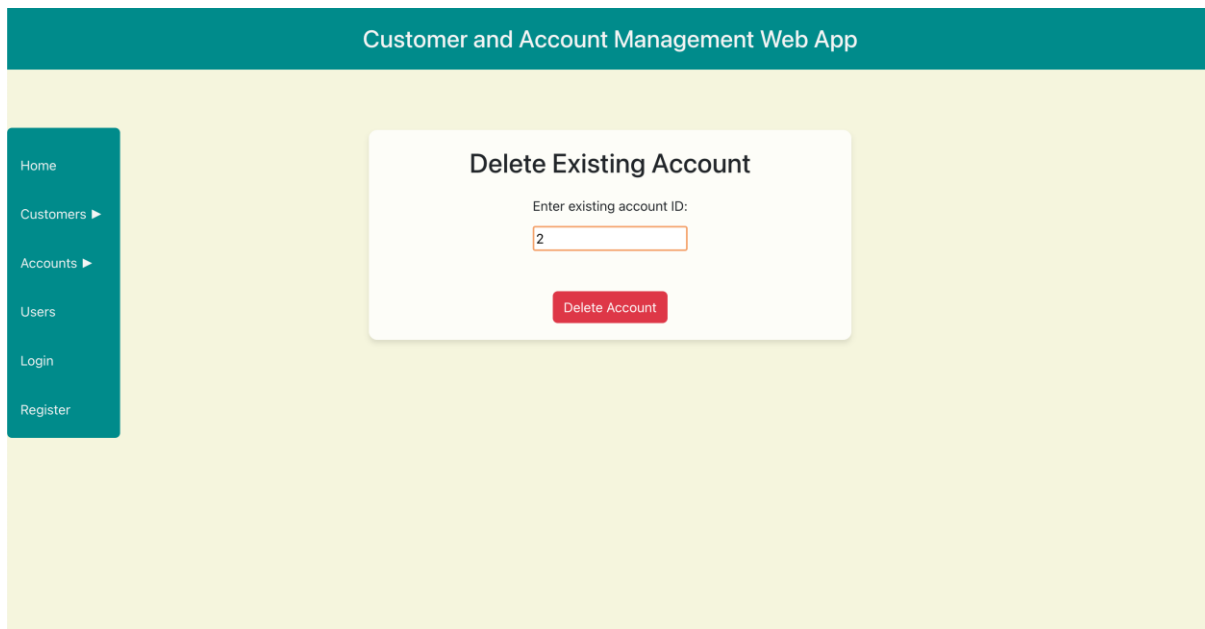
Account ID	Account type	Account balance / £	Interest rate / %	Actions
1	Savings	2300	4.5	<button>Update</button>
2	Savings	45000	5	<button>Update</button>
3	Checking	120	n/a	<button>Update</button>

Home
Customers ▶
Accounts ▶
Users
Login
Register

Delete Account

Again, there are no quick actions for deletion to avoid deleting by mistake.

To delete an account, head over to the “Delete Existing Account” tab under “Accounts”. Enter the ID you wish to delete, then click “Delete Account”.



Customer and Account Management Web App

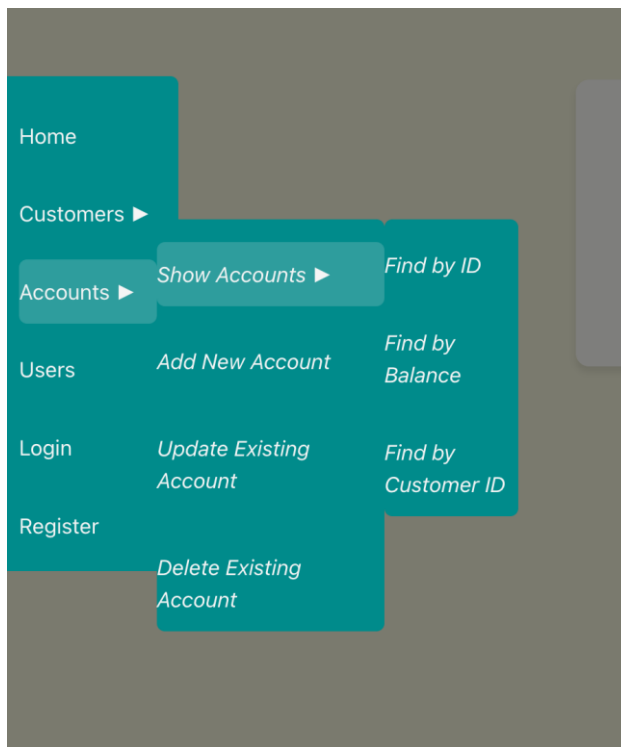
Delete Existing Account

Enter existing account ID:

Delete Account

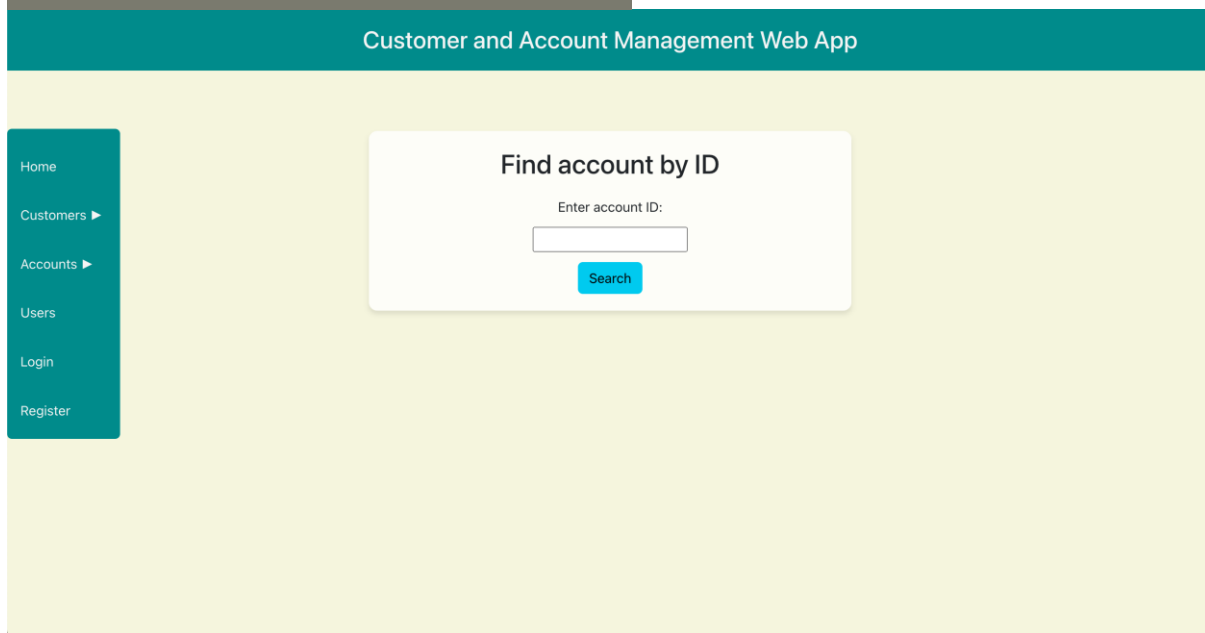
Home
Customers ▶
Accounts ▶
Users
Login
Register

Find account by ID



You can access the "Find account by" functions under Accounts and Show Accounts.

To find an account by ID, simply enter the ID into the search bar and click search.



Find account by balance

To find an account by balance, you need to enter the range you are looking for.

The screenshot shows a web application titled "Customer and Account Management Web App". On the left is a teal sidebar with navigation links: Home, Customers (with a right arrow), Accounts (with a right arrow), Users, Login, and Register. The main content area has a light yellow background. In the center is a white card titled "Find account by balance" with the subtitle "Search for accounts with a balance in range:". Below the subtitle are two input fields labeled "min:" and "max:". A teal "Search" button is positioned below the "max:" field. At the bottom of the card, a message states: "No accounts found for given range of balance."

Find account by customer ID

Finally, to find all accounts of a particular customer, enter the customer ID.

The screenshot shows the same web application titled "Customer and Account Management Web App" with the same teal sidebar. The main content area has a light yellow background. In the center is a white card titled "Find accounts by Customer ID" with the subtitle "Enter customer ID:". Below the subtitle is a single input field. A teal "Search" button is positioned below the input field.

You're all set!