Customer and Accounts Management Web App

User Guide 2025

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Getting started

Home page

When you first launch the web app, you get taken to the Home Page.
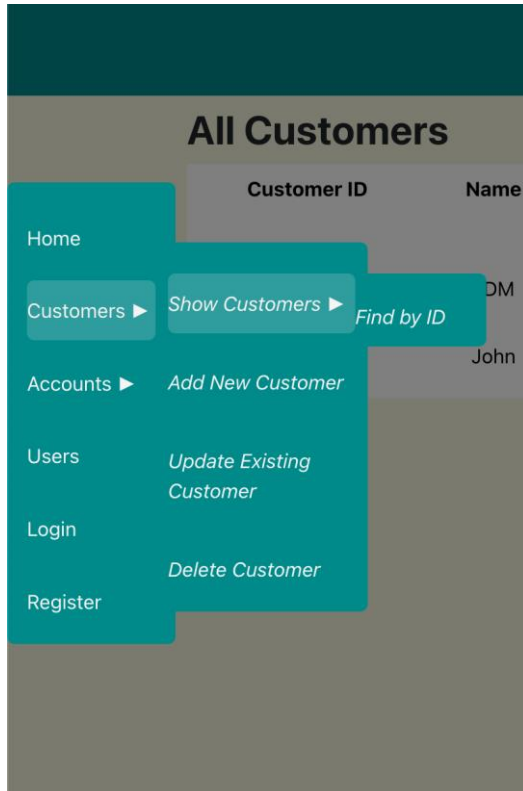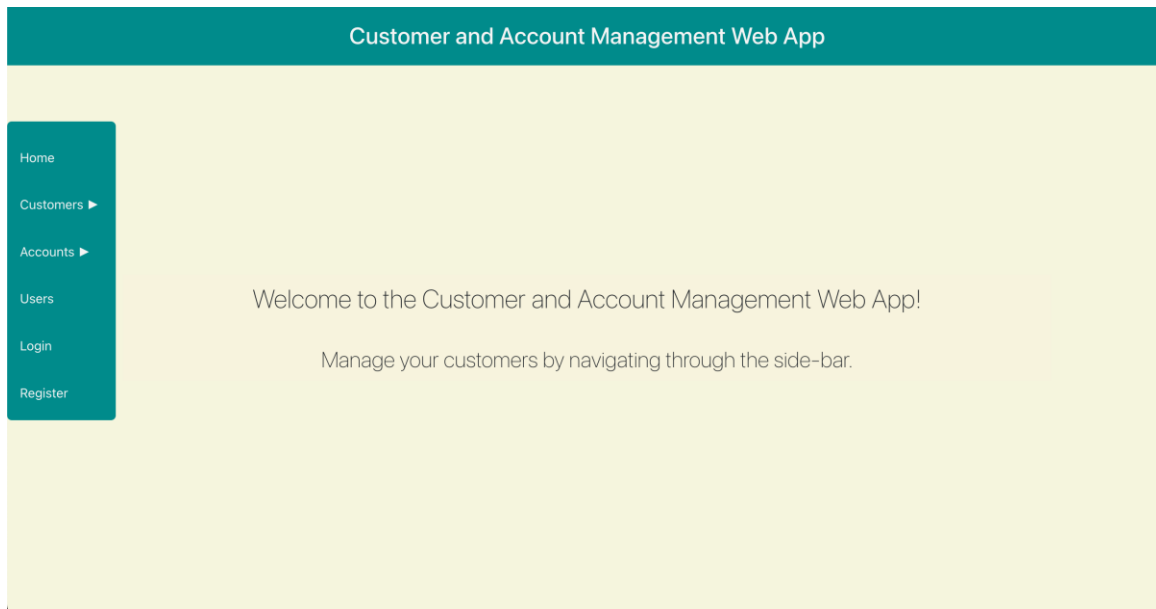
You can navigate through the application through the sidebar. The tabs with a white triangle contain a drop-down menu with more options. This sidebar is accessible on every page, so you can access any functionality from anywhere.

Register

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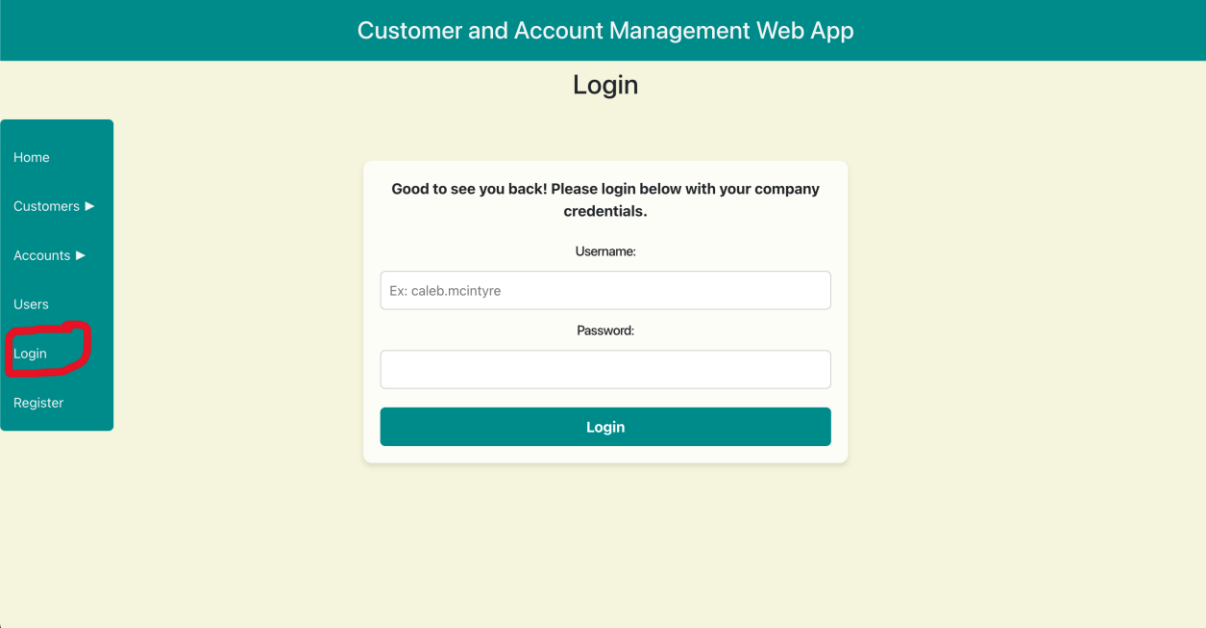

After creating a username and password, click on the "Register" button, and it will redirect you to the Users page with a list of all registered users.

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.

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.

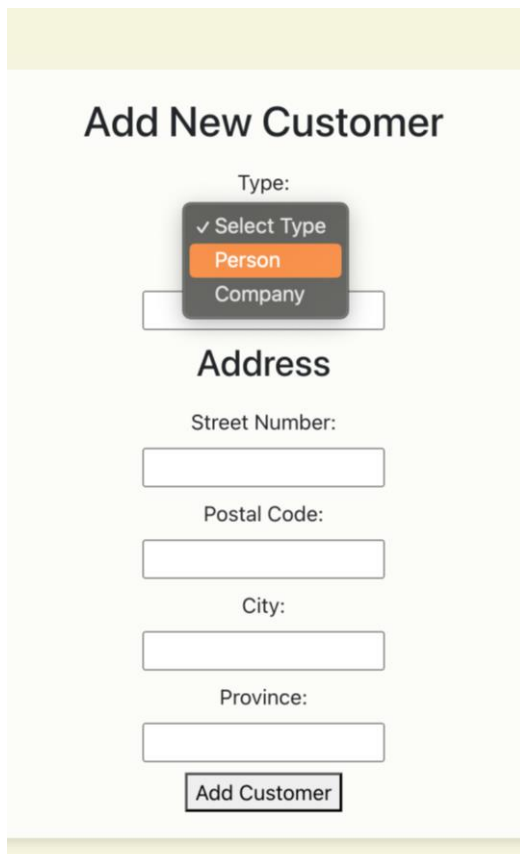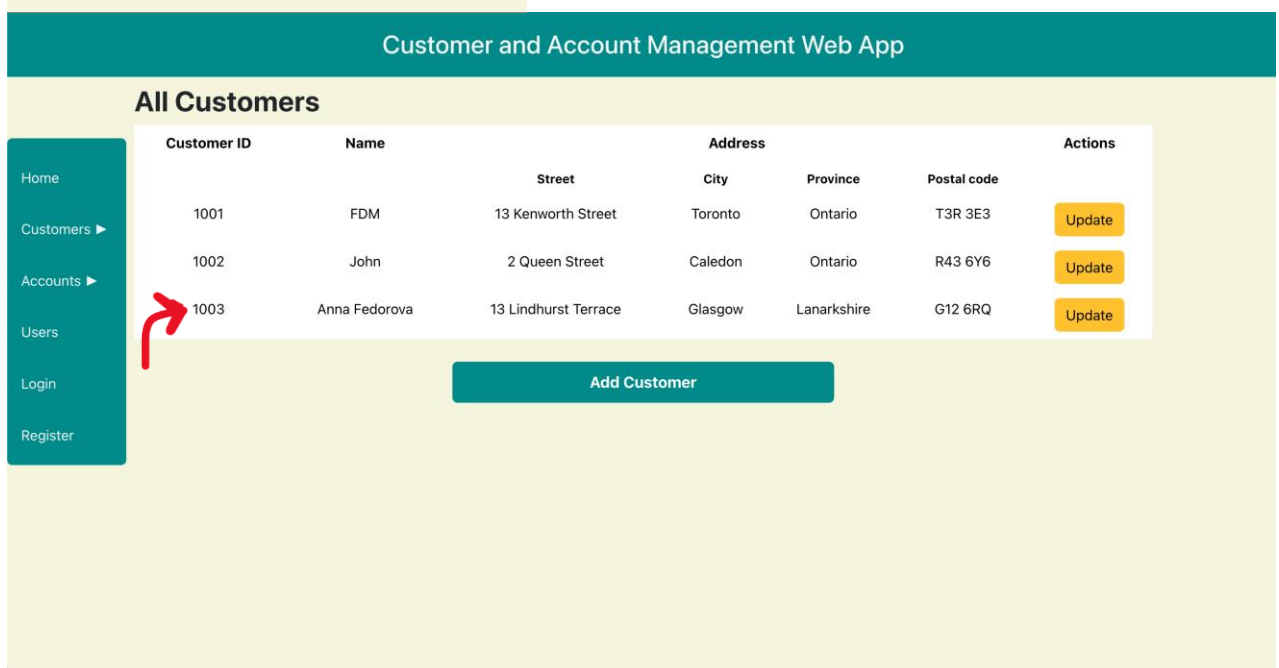The "Add Customer" button brings you to a page to add a new customer.

Add a new 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.

Update customer details

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.

After updating your desired details, scroll down to submit the information.
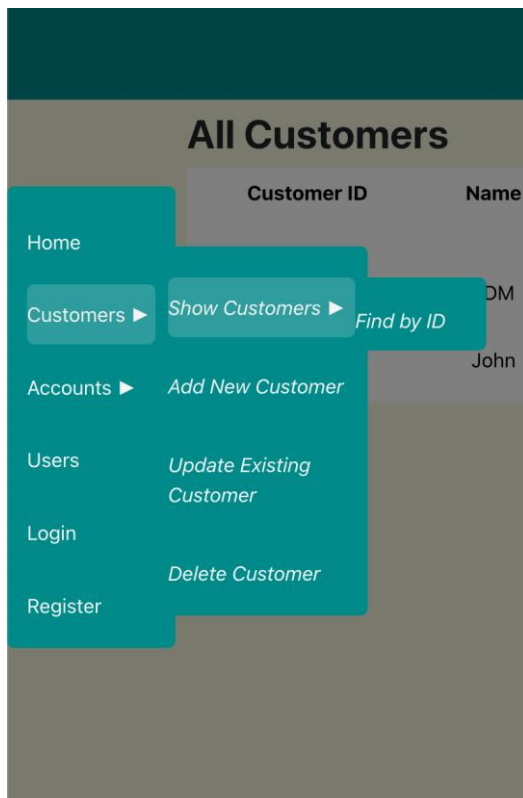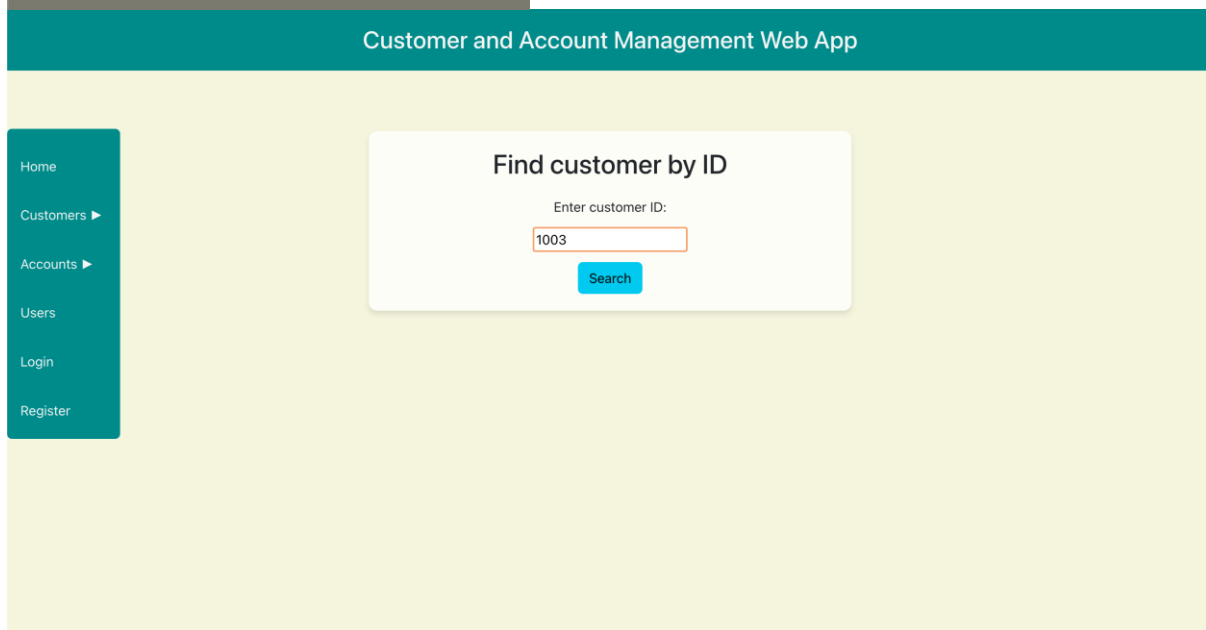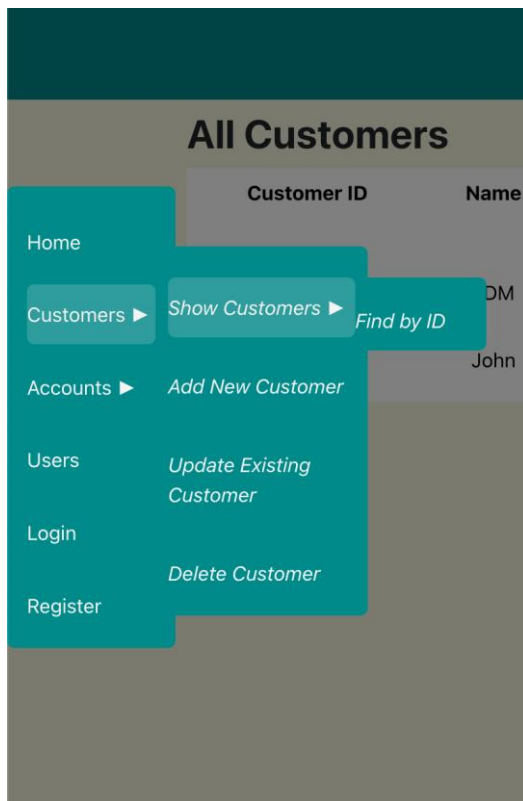
Find customer by ID

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

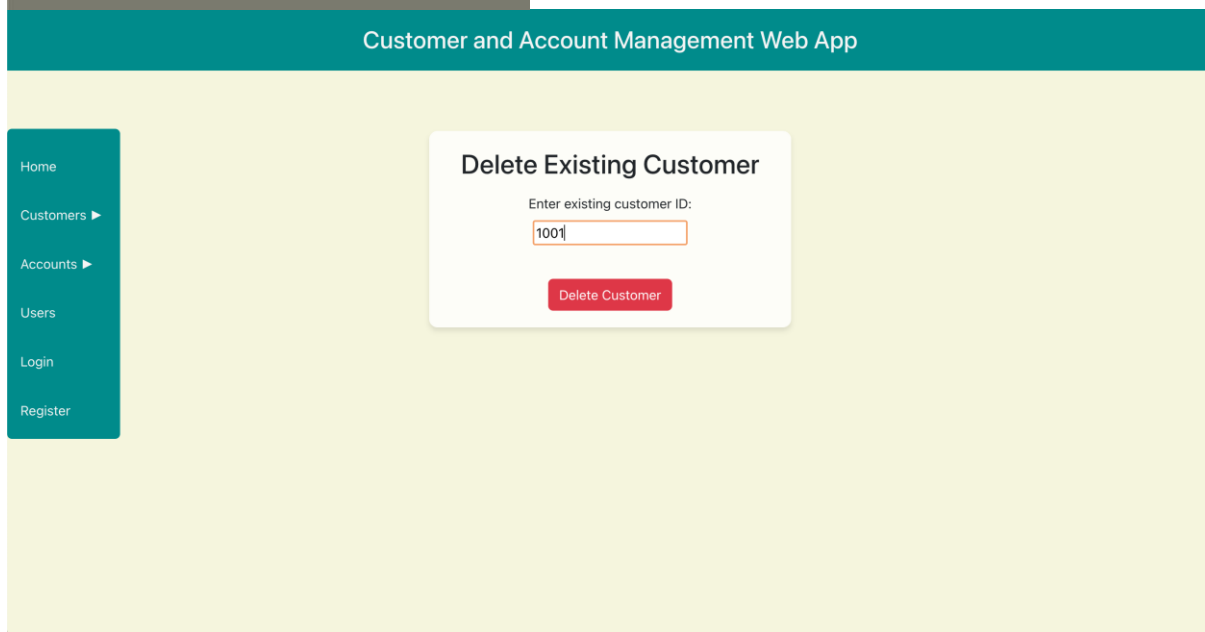Enter the ID of the customer and press "Search".

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".

You will be redirected to the Add Account page.
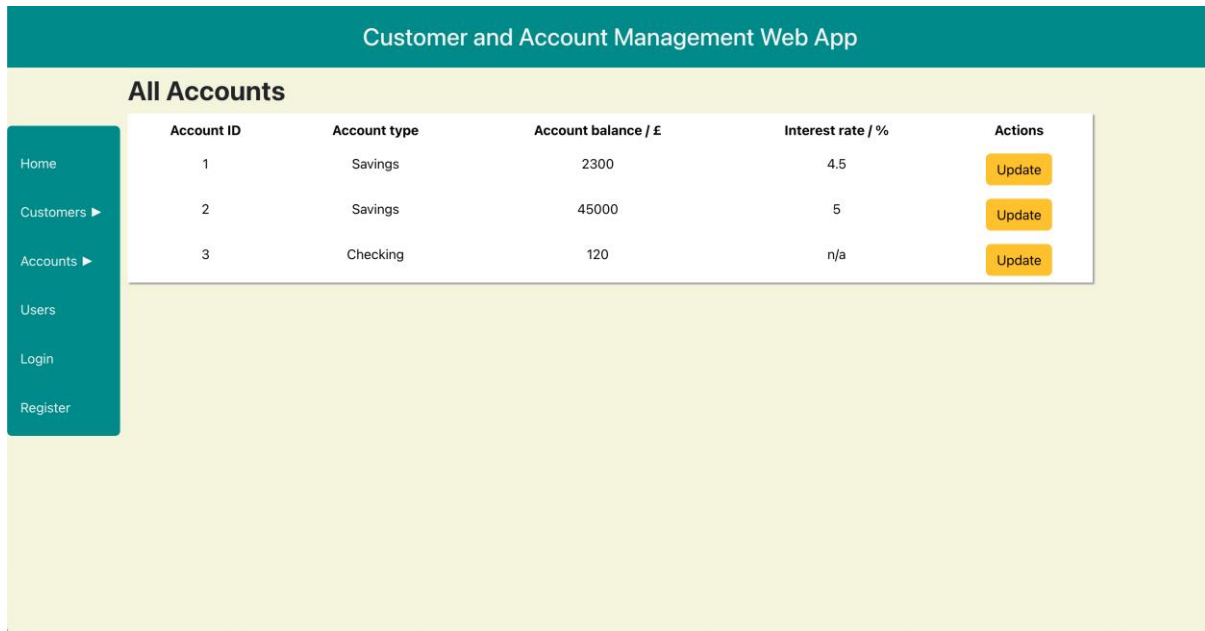

After entering the account details, click submit, and you will be redirected back to view all accounts.

Update Account

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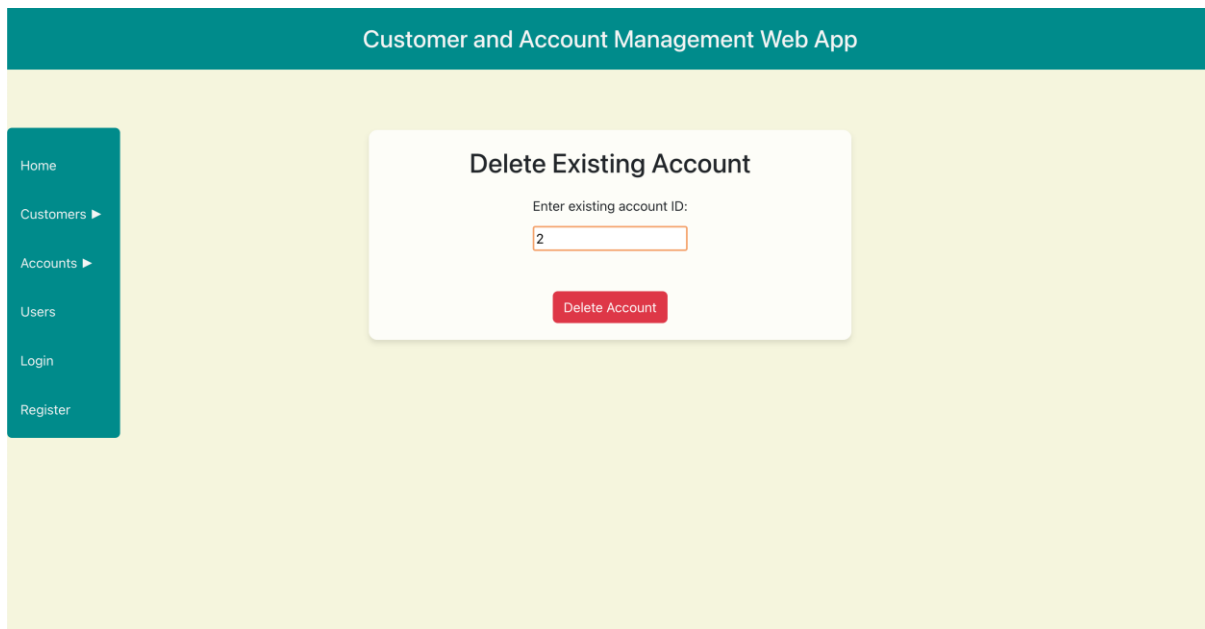
Delete Account

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".

Find account by ID

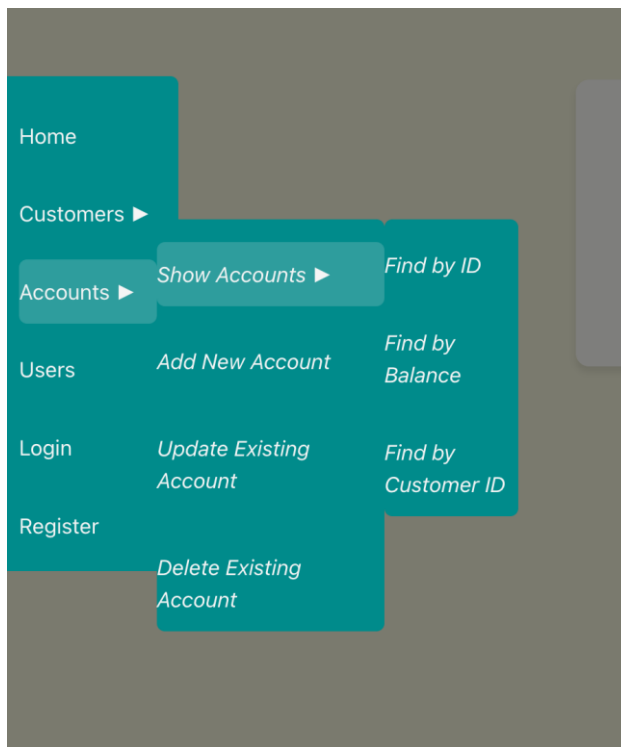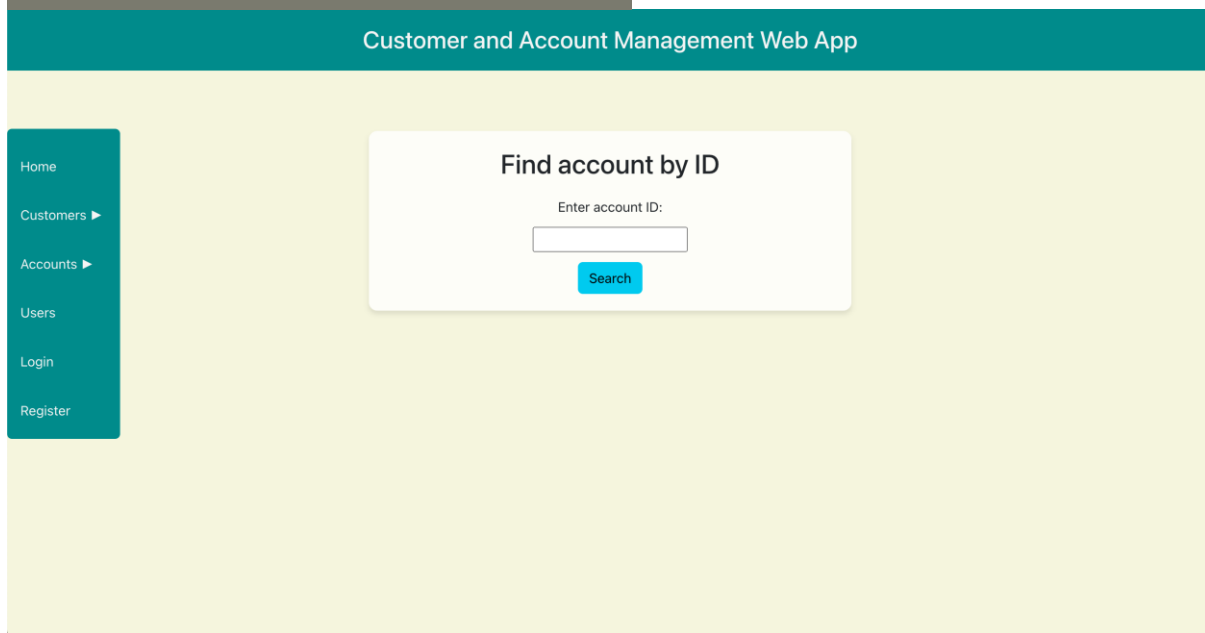You can access the "Find account by" functions under Accounts and Show Accounts.

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.

Find account by customer ID

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

You're all set!