# Your Prospects

Application to enable tracking of your important business contacts

## Status

SET A STATUS

## Lead

Add a *user profile* for your team lead.

## Team

Add a *user profile* for each member of your team.

## Recently updated

Prospect detail
19 minutes ago • contributed by Michal Nemejovsky

Reminder email
24 minutes ago • contributed by Michal Nemejovsky

High level concept
Nov 18, 2020 • contributed by Michal Nemejovsky

Entities & Attributes
Nov 18, 2020 • contributed by Michal Nemejovsky

Add prospect
Nov 18, 2020 • contributed by Michal Nemejovsky

Pages / E-mails
Nov 18, 2020 • contributed by Michal Nemejovsky

Complete user flow
Nov 18, 2020 • contributed by Michal Nemejovsky

## Roadmap

*Edit this* roadmap planner *to link a Confluence page to each bar.*

## Jira Issues

*Edit this* Jira issues list *to change what fields and issues are displayed.*

| Key | T | Created | Updated | Due | Assignee | Status | Resolution |
|-----|---|---------|---------|-----|----------|--------|------------|

No issues found

*NEED INSPIRATION?*

- Get a quick rundown on how to build Confluence spaces for any team or project
- See these tips on how to stay on top of your software project in Confluence

# Retrospectives

Create retrospective

**Title**

No content found.

## Decision log

Create decision

**Decision**

No content found.

## File lists

Create file list

## Product requirements

Create product requirement

**Title**

No content found.

## Meeting notes

Create meeting note

**Incomplete tasks from meetings**

**Task report**

Looking good, no incomplete tasks.

**All meeting notes**

## High level concept

This web application enables users to manage their lists of prospects and follow interactions with them. For what is such list good? It could be for new business opportunities or track interactions with friends and family members. For each prospect it will be possible to define his/her importance. The app will be sending reminders. Registration and authentication is required.

## Detailed concept

**Complete user flow**
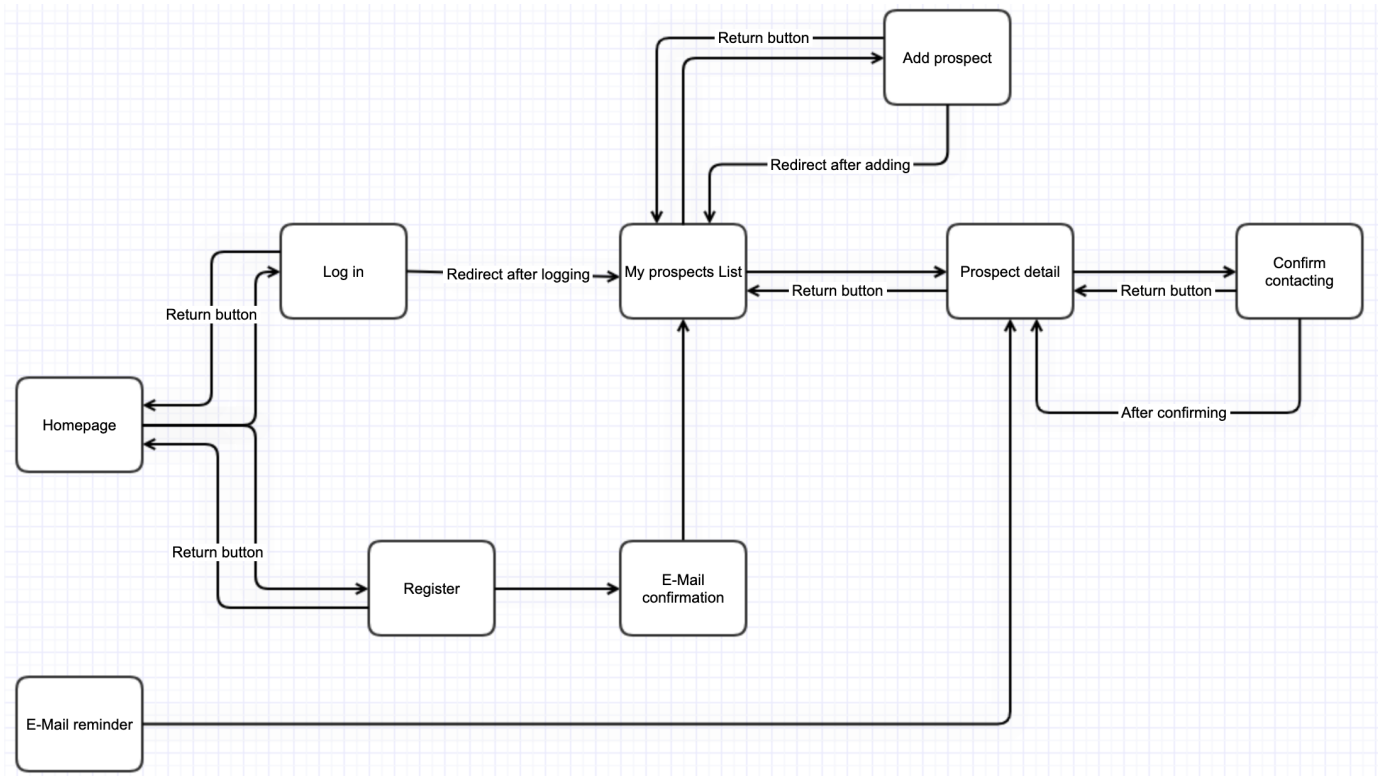
## Entities & Attributes

```
┌─────────────────┐     ┌─────────────────┐
│                 │     │                 │
│      User       │     │      Event      │
│                 │     │                 │
└─────────────────┘     └─────────────────┘

┌─────────────────┐     ┌─────────────────┐
│                 │     │                 │
│    Prospect     │     │     Rating      │
│                 │     │                 │
└─────────────────┘     └─────────────────┘

┌─────────────────┐  ┌─────────────────┐  ┌─────────────────┐
│ Communication   │  │ Prospect type   │  │ Type of event   │
│ form <<enum>>   │  │   <<enum>>      │  │   <<enum>>      │
│                 │  │                 │  │                 │
└─────────────────┘  └─────────────────┘  └─────────────────┘
```

- **Prospect**
  - Prospect ID
    - Auto generated short with increment
  - E-Mail
    - String
  - Prospect name
    - String
  - Telephone
    - String
  - Instagram
    - String
  - Facebook
    - String
  - LinkedIn
    - String
  - SMS
    - String
  - Additional information
    - String
  - Prospect since
    - Date

- Frequency of contact
  - Just whole numbers without zero
- E-Mail reminder set
  - Boolean
- **User**
  - E-Mail
    - ID
    - String
  - Password
    - Encoded String
  - Active
    - Boolean
- **Event**
  - Type of event
    - Reference to enum
  - Date of event
  - Content
    - String
- **Type of event (enum)**
  - Creation event
  - Confirmation event
- **Rating**
  - Value
    - Possibile values (1,2,3,4,5)
  - Prospect
    - Reference to prospect (ID)
- **Communication Form (enum)**
  - E-Mail
  - Phone
  - Physical
  - Social Media - Facebook
  - Social Media - Instagram
  - Social Media - LinkedIn
  - Social Media - Other
  - SMS
  - Combined
- **Prospect Type (enum)**
  - Business partner
  - Coworker
  - Family
  - Friend
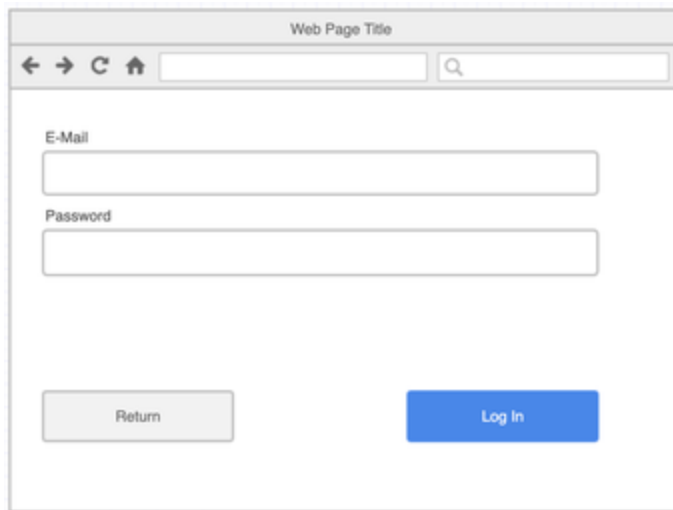  - Other

## Pages / E-mails

### Homepage

1. This is the main page, where user lands, after visiting the domain.
2. Register button available
   a. Click leads to the registration page Register
3. Login button available
   a. Click leads to the log in page Log in
4. Content with text is available
   a. "Welcome to the web application!"

## Web Page Title



Log in    Register

Welcome to this new web application!
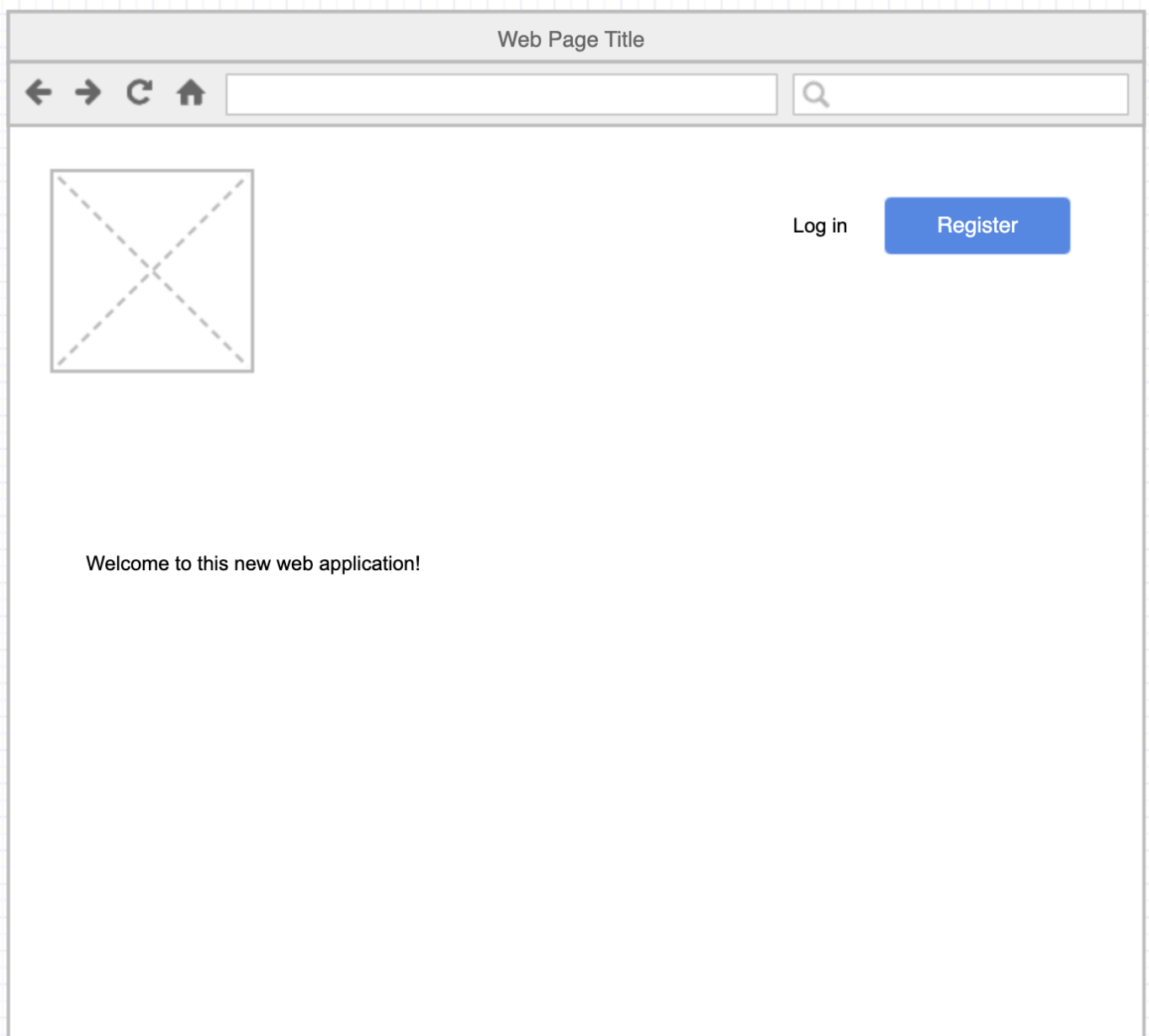
**Log in**

1. To login, User has to enter valid email and password combination and confirm via "Log in" button, if the combination is not valid, the message "entered E-Mail and password combination is not valid" and it is not possible to log in.
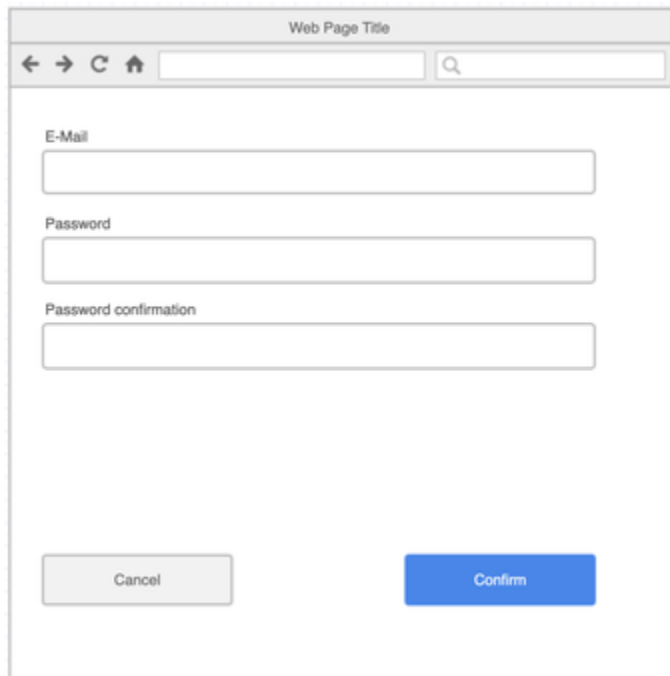2. Click on return returns the user to the homepage

**Register**

1. User has to enter email address - check for email format to correspond with the format for email addresses
2. Password has to be entered 2 times - check whether the entered passwords match.
    a. If not, message "the passwords do not match" has to be shown.
3. Click on confirm saves the user to the database
    a. If the email is already registered - message is displayed: E-mail already exists! - In this case user has to select another e-mail, otherwise it is not saved into the database
    b. At this stage user is set as inactive, registration confirmation mail is sent to his/her email address with the "confirm registration" link.
        i. After click to this link, user returns to the application and his/her account is activated. User is also automatically logged in.



**List prospects**

1. Prospects belonging to the logged in user, are listed on this listing page, sorted by importance rating from highest to lowers. In case that the Importance rating is the same, as 2 sort prospects are sorted by name alphabetically (A-Z).
2. In header 2 buttons are available:
    a. Add new prospect

           i.  Click leads to the add prospect page: Add prospect

      b.  Log out

           i.  Click logs user out and redirects him/her to the homepage.

3. If there are many prospects then what fits to the page, scrollbar is displayed on the right side, which enables user to scroll up/down. Header with attribute names stays fixed on top (always visible when scrolling)

4. Following attributes are displayed about each prospect belonging to the user:

    a.  Prospect name

    b.  Prospect type

    c.  Communication form

    d.  Last contact on

    e.  Importance rating

         i.  It is also possible to rate prospects here, behavior is the same as rating on the prospect detail page, sorting is done after page reload.

    f.  Button "See detail"

         i.  Click on this button leads to the detail page of the prospect: Prospect detail

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Web Page Title

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Log out

[Add new prospect]

| Prospect name | Prospect type | Communication form | Last contact on | Importance rating | Prospect Detail |
|---|---|---|---|---|---|
| John Doe | Business Partner | Phone | 22.2.2020 | ★★★★★ | See detail |
| Mr. Smith | Friend | Phone | 18.7.2020 | ★★★★☆ | See detail |
| Jane Edwards | Friend | Phone | 3.5.2020 | ★★★★☆ | See detail |
| Karoline Key | Business Partner | E-Mail | 16.2.2020 | ★★★☆☆ | See detail |
| David Conty | Family | Phone | 15.11.2020 | ★★★☆☆ | See detail |
| Bale Matters | Family | E-Mail | 20.4.2020 | ★★☆☆☆ | See detail |
| Holy Smith | Business Partner | SMS | 2.6.2020 | ★☆☆☆☆ | See detail |
| Pave Ground | Friend | SMS | - | ★☆☆☆☆ | See detail |

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### Add prospect

1. When adding prospect it is mandatory to fill this information:

    a.  Prospect name

        b. Communication form (Dropdown)

        c. Star rating

              i. Default one star is selected.

                     1. E.g. click on 3rd star from left sets the rating to 3 stars, 4th from left to 4 etc, all selected stars are shown yellow.

        d. Prospect type (Dropdown)

2. Additional information can be optionally added.

3. After clicking on "Add prospect" button, prospect is saved to the database, user is redirected to the prospect listing and the newly added prospect will be already visible there on position, which corresponds with his/her importance rating.

        a. Adding event is created and saved including date & time. It is to be displayed here: Prospect detail



**Prospect detail**

1. Prospect data is loaded from the database.

2. The fields are editable

3. Some fields are the same as on the page for adding prospects: Add prospect Those are:

        a. Prospect name

        b. Communication Form (dropdown)

        c. Prospect type (dropdown)

        d. Importance rating

              i. Same behaviour as here: Add prospect

4. Other fields:

        a. Prospect since

        b. E-Mail

        c. Added on

        d. Phone

        e. Address

f.  Facebook
        g.  Instagram
        h.  LinkedIn
        i.  Set E-Mail reminder
                i.  If set to yes Reminder email is sent based on frequency below
                ii.  If set to no Reminder email is not sent at all
        j.  Frequency of contact
                i.  Set in days, based on the number it is calculated when Reminder email should be sent.
                        1.  E.g. if last contact is 5.10.2020 and the frequency of contact is set to 10 days, the reminder email will be sent
                            on 15.10.2020 (If Set E-Mail reminder active is set to use)
        k.  Last contact on
                i.  Date when last contact happened (when the contacting was confirmed onConfirm contacting for the last time)
        l.  Additional information
    5.  Apart from that prospect history is logged and shown
        a.  Following events are shown:
                i.  Prospect contacted
                ii.  Prospect added
                iii.  Sorted from newest (top) to oldest
    6.  Buttons:
        a.  Return
                i.  When clicked returns back to List prospects
        b.  Just contacted!
                i.  By click page Confirm contacting opens

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Web Page Title

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Log out

Prospect name                          Communication form
[ John Smith                    ]       [ Mixed                      ▼ ]

Prospect since                         Prospect type
[ 2.2.2020                      ]       [ Business partner           ▼ ]

E-Mail                                 Address
[                               ]       [                              ]

Phone                                  Facebook
[                               ]       [                              ]

LinkedIn                               Instagram
[                               ]       [                              ]

## Set E-Mail reminder

On

## Frequency of contact

every | 20 | ⇕ | days

## Last contact on

**6.4.2020**

## Importance rating

★☆☆☆☆

## Additional information

We met on a conference by food and had mutual business interest. This is a contact to follow up with

## Contact History

6.4.2020 Contacted via Phone - Long discussion regarding business - Good!

23.3.2020 Contacted via E-Mail - Short answer

23.2.2020 Contacted via Phone - No response

5.2.2020 - Prospect added

Return

Just contacted!

**Reminder email**

- Content of the email is message:
  - "Alert! Today you should contact <Name>, based on the alarm you have set. Please do so and then confirm last contacted date here: <Link>. Importance of this contact is: <Importance rating 1-5>"
    - <Name> is the name of the prospect and <Link> is a link leading to the profile of the prospect (Prospect detail ), where it is possible to confirm last contact.

**Confirm contacting**

1. This page is displayed once the button "Just contacted" is clicked. The purpose is, to log information about the event.

2. Buttons:
   a. Return
      i. Click returns to the prospect detail page
   b. Save
      i. Click saves the event - its message and date&time and returns to the prospect detail page

## Web Page Title

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How did the contacting go?

[                                        ]

[ Return ]                    [ Save ]