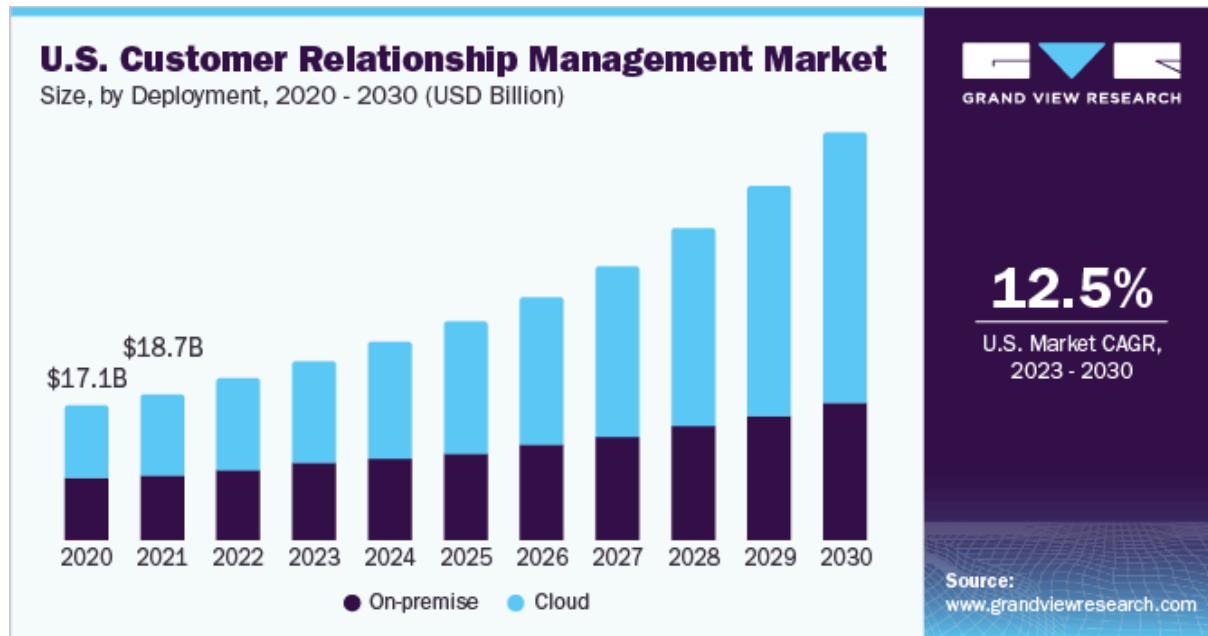


Database Lab

Customer Relationship Management(CRM) System

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Introduction

CRM, "Customer Relationship Management". So, managing all the interactions between a company and its existing or potential customers. CRM is a software that stores all customer data and interactions, facilitates tracking activities, aggregates contacts, creates reports, sends emails, and automates business processes. The goal of CRM is to keep relationships with customers by offering tailored reactions.

The important points of a CRM project are :

- Target contacts in his market
- Know the needs of its customers
- Segment your messages and proposals
- Customize the commercial offer
- Satisfy the customer (price, quality, deadlines, purchase route, experience)

Improve the way it responds to customer expectations
Maintain a competitive advantage in its market

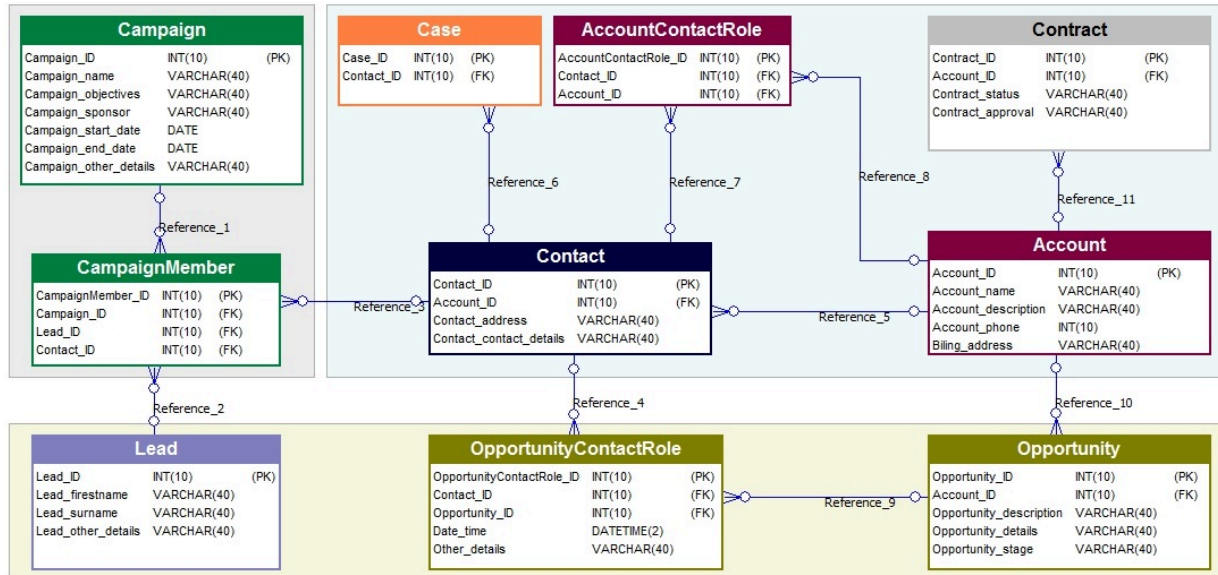


Figure : CRM ER Diagram example

It's a system that manages customer interactions and data throughout the customer life-cycle between the customer and the company across different channels. For this project, we are going to build a custom CRM in PHP and MySQL, which a sales team can use to track customers through the entire sales cycle.

In the end, we want to build this CRM system in such a way that salespeople can do the following:

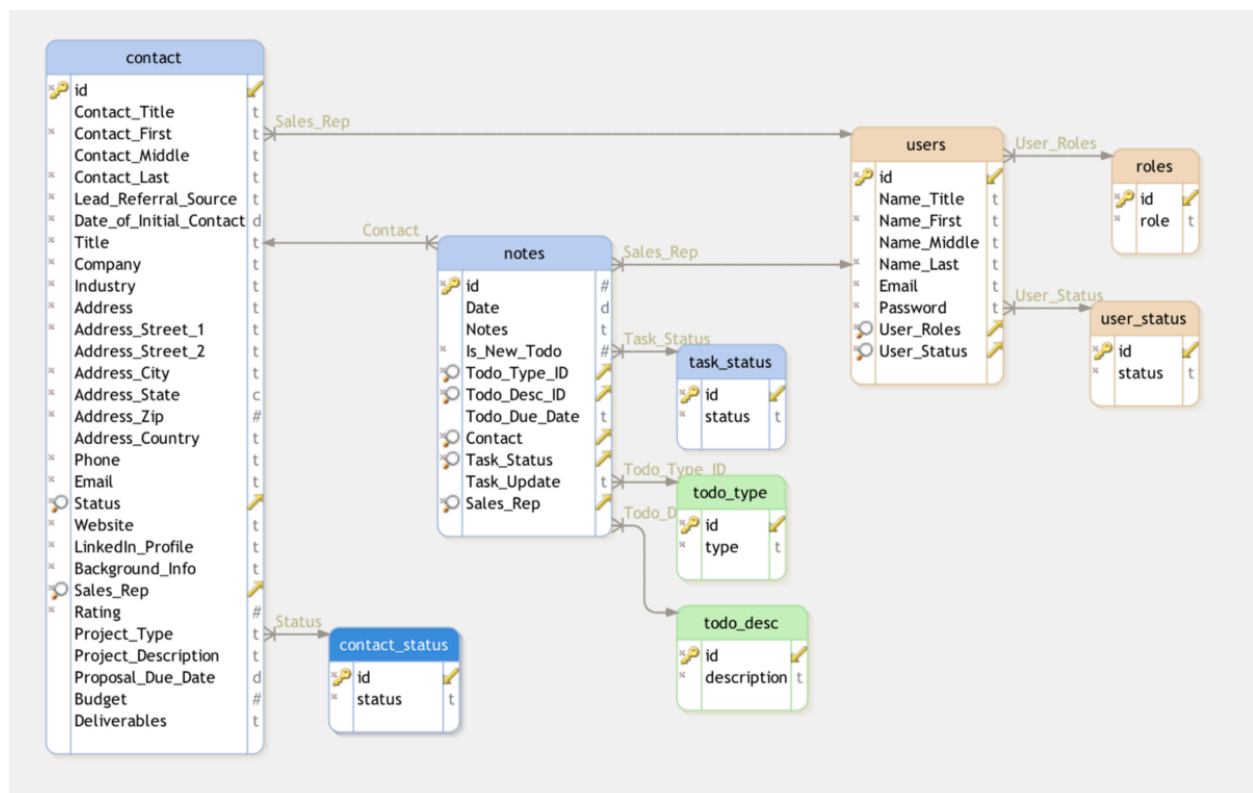
1. Access their tasks
2. View their Tasks
3. Create new tasks

4. for each lead Create new opportunities

5. Close a sale

Moreover, we want Sales Managers to be able to do the following:

1. Manage all customers
2. Manage their sales team
3. View current sales activities



SQL

Dump of table contact

```
DROP TABLE IF EXISTS `contact`;
```

```
CREATE TABLE `contact` (  
  `id` int(11) unsigned NOT NULL AUTO_INCREMENT,  
  `Contact_Title` varchar(30) DEFAULT NULL,  
  `Contact_First` varchar(5) NOT NULL,  
  `Contact_Middle` varchar(30) DEFAULT NULL,  
  `Contact_Last` varchar(8) NOT NULL,  
  `Lead_Referral_Source` varchar(23) NOT NULL,  
  `Date_of_Initial_Contact` date NOT NULL,  
  `Title` varchar(20) NOT NULL,  
  `Company` varchar(16) NOT NULL,  
  `Industry` varchar(12) NOT NULL,  
  `Address` varchar(38) NOT NULL,  
  `Address_Street_1` varchar(17) NOT NULL,  
  `Address_Street_2` varchar(30) DEFAULT NULL,  
  `Address_City` varchar(12) NOT NULL,
```

```

`Address_State` char(2) NOT NULL DEFAULT '',
`Address_Zip` int(11) NOT NULL,
`Address_Country` varchar(30) DEFAULT NULL,
`Phone` varchar(14) NOT NULL,
`Email` varchar(20) NOT NULL,
`Status` int(11) unsigned NOT NULL,
`Website` varchar(23) NOT NULL,
`LinkedIn_Profile` varchar(21) NOT NULL,
`Background_Info` text NOT NULL,
`Sales_Rep` int(11) unsigned NOT NULL,
`Rating` decimal(4,2) NOT NULL,
`Project_Type` varchar(35) DEFAULT NULL,
`Project_Description` tinytext,
`Proposal_Due_Date` date DEFAULT NULL,
`Budget` decimal(10,2) DEFAULT NULL,
`Deliverables` varchar(30) DEFAULT NULL,
PRIMARY KEY (`id`),
KEY `FK_SALES_REP` (`Sales_Rep`),
KEY `FK_STATUS` (`Status`),
CONSTRAINT `FK_SALES_REP` FOREIGN KEY (`Sales_Rep`) REFERENCES `users`
(`id`),
CONSTRAINT `FK_STATUS` FOREIGN KEY (`Status`) REFERENCES
`contact_status` (`id`)
) ENGINE=InnoDB DEFAULT CHARSET=utf8;

```

```

LOCK TABLES `contact` WRITE;

/*!40000 ALTER TABLE `contact` DISABLE KEYS */;

INSERT INTO `contact` (`id`, `Contact_Title`, `Contact_First`,
`Contact_Middle`, `Contact_Last`, `Lead_Referral_Source`,
`Date_of_Initial_Contact`, `Title`, `Company`, `Industry`, `Address`,
`Address_Street_1`, `Address_Street_2`, `Address_City`, `Address_State`,
`Address_Zip`, `Address_Country`, `Phone`, `Email`, `Status`, `Website`,
`LinkedIn_Profile`, `Background_Info`, `Sales_Rep`, `Rating`,
`Project_Type`, `Project_Description`, `Proposal_Due_Date`, `Budget`,
`Deliverables`)

VALUES

(1,NULL,'Amir',NULL,'Kahnzz','www.google .com','2014-05-09','PR
Director','Barnes and Wells','PR','52 Broadway New York, NY 12345','52
Broadway',NULL,'New York','NY',12345,NULL,'(234)
432-2234','amir@pr.com',1,'www.pr.com','www.sample.com','4 years as PR
Dir. Knows the biz and has wide
network.',1,4.00,NULL,NULL,NULL,NULL,NULL),

(2,NULL,'Dave',NULL,'Myers','Mack Truck Partner Site','2014-02-11','DEF
Sales','DEF Fluids','Auto','456 Diesel St Philadelphia, PA 19308','456
Diesel St',NULL,'Philadelphia','PA',19308,NULL,'(765)
765-7755','dave@def.com',2,'www.def.com','www.sample.com','19 years in
biz',2,2.50,NULL,NULL,NULL,NULL,NULL),

(3,NULL,'Jason',NULL,'Wright','salesforce
associate','2014-09-12','Marketing Director','Ben and
Jerry\'s','Food','123 Ice Cream Way Burlington, VT 12345','123 Ice Cream
Way',NULL,'Burlington','VT',12345,NULL,'(123)
432-1223','eat@benandjerrys.com',1,'www.benandjerrys.com','http://www.samp
le.com','Amazing ice creme company from Vermont. Sustainable
practices.',1,4.00,NULL,NULL,NULL,NULL,NULL),

```

```

(4,NULL,'Linda',NULL,'DeCastro','Conference','2014-01-19','Regional
Sales Mgr','Pillsbury','Retail Foods','44 Reading Rd Flourtown, NJ
39485','44 Reading Rd',NULL,'Flourtown','NJ',39485,NULL,'(555)
555-5555','linda@pillsbury.com',3,'www.pillsbury.com','www.sample.com','Ne
w territory MGR',1,3.00,'New Packaging for Cookie products','Design new
cookie packaging for new line of Sugar Free
cookies.','2014-11-01',45000.00,'6 Proofs, multiple assets'),

(5,NULL,'Sally',NULL,'Jane','CES
Conference','2014-07-01','COO','Facetech','Tech','123 Tech Blvd Menlo
Park, CA 12345','123 Tech Blvd',NULL,'Menlo Park','CA',12345,NULL,'(321)
321-1122','sally@facetech.com',1,'http://www.facetech.com','www.sample.com
','Great contact, has a really great
roadmap.',1,5.00,NULL,NULL,NULL,30000.00,NULL),

(6,NULL,'Tim',NULL,'Smith','www.google.com','2014-10-10','Supply Chain
Manager','Levis','Apparel','1 Blue Jean St. Corduroy, CO 12345','1 Blue
Jean St.',NULL,'Corduroy','CO',12345,NULL,'(321)
321-4321','tim@levis.com',2,'www.levis.com','www.sample.com','Jeans and
apparel for eastern U.S.<br />',1,3.50,'Shelf talkers; kiosk style
displays','Set up shelf talkers for stock shelves with an end of aisle
kiosk detailing the history of Levis.','2014-11-05',333000.00,'10k shelf
talkers, 1500 kiosks');

/*!40000 ALTER TABLE `contact` ENABLE KEYS */;

UNLOCK TABLES;

DROP TABLE IF EXISTS `contact_status`;

```



```

CREATE TABLE `notes` (
  `id` int(11) unsigned NOT NULL AUTO_INCREMENT,
  `Date` date DEFAULT NULL,
  `Notes` tinytext,
  `Is_New_Todo` int(11) unsigned NOT NULL,
  `Todo_Type_ID` int(11) unsigned NOT NULL,
  `Todo_Desc_ID` int(11) unsigned NOT NULL,
  `Todo_Due_Date` varchar(29) DEFAULT NULL,
  `Contact` int(11) unsigned NOT NULL,
  `Task_Status` int(11) unsigned NOT NULL,
  `Task_Update` varchar(51) DEFAULT NULL,
  `Sales_Rep` int(11) unsigned NOT NULL,
  PRIMARY KEY (`id`),
  KEY `FK_EVENT_NAME` (`Todo_Type_ID`),
  KEY `FK_EVENT_TYPE` (`Todo_Desc_ID`),
  KEY `FK_CONTACT_ID` (`Contact`),
  KEY `FK_SALES_ID` (`Sales_Rep`),
  KEY `FK_TASK_STATUS` (`Task_Status`),
  CONSTRAINT `FK_CONTACT_ID` FOREIGN KEY (`Contact`) REFERENCES `contact`
(`id`),
  CONSTRAINT `FK_EVENT_NAME` FOREIGN KEY (`Todo_Type_ID`) REFERENCES
`todo_type` (`id`),
  CONSTRAINT `FK_EVENT_TYPE` FOREIGN KEY (`Todo_Desc_ID`) REFERENCES
`todo_desc` (`id`),

```

```

    CONSTRAINT `FK_SALES_ID` FOREIGN KEY (`Sales_Rep`) REFERENCES `users`
(`id`),

    CONSTRAINT `FK_TASK_STATUS` FOREIGN KEY (`Task_Status`) REFERENCES
`task_status` (`id`)

) ENGINE=InnoDB DEFAULT CHARSET=utf8;

LOCK TABLES `notes` WRITE;

/*!40000 ALTER TABLE `notes` DISABLE KEYS */;

INSERT INTO `notes` (`id`, `Date`, `Notes`, `Is_New_Todo`, `Todo_Type_ID`,
`Todo_Desc_ID`, `Todo_Due_Date`, `Contact`, `Task_Status`, `Task_Update`,
`Sales_Rep`)
VALUES

(1, '2014-07-11', 'dddddd', 1, 1, 1, '07/23/2014 6:00pm to 8:00pm', 1, 1, '', 1),

(2, '2015-10-10', 'Sample Note', 0, 1, 1, NULL, 2, 1, NULL, 2),

(3, '2015-05-21', 'sx', 1, 1, 2, '07/31/2014', 3, 1, '', 1),

(4, '2014-06-01', 'Want to be sure to communicate
weekly.', 1, 2, 3, '07/04/2014 10:00am to 10:30am', 4, 1, 'Ongoing', 1),

(5, '2014-01-31', 'Was introduced at textile
conference.zzz', 1, 1, 1, '04/09/2014 3:45pm to 4:45pm', 5, 2, 'Great demo. All
they needed to seal the deal.<br>', 1),

(6, '2014-11-11', 'Great to have this customer on
board!', 0, 1, 4, NULL, 6, 1, NULL, 1),

(7, '2017-01-27', 'test', 0, 1, 2, '', 3, 1, '', 1),

(8, '2017-01-11', 'test123', 0, 1, 5, NULL, 6, 1, NULL, 1);

```

```
/*!40000 ALTER TABLE `notes` ENABLE KEYS */;

UNLOCK TABLES;


DROP TABLE IF EXISTS `roles`;


CREATE TABLE `roles` (
  `id` int(11) unsigned NOT NULL AUTO_INCREMENT,
  `role` varchar(64) NOT NULL DEFAULT '',
  PRIMARY KEY (`id`)
) ENGINE=InnoDB DEFAULT CHARSET=utf8;


LOCK TABLES `roles` WRITE;

/*!40000 ALTER TABLE `roles` DISABLE KEYS */;

INSERT INTO `roles` (`id`, `role`)
VALUES
  (1, 'Sales Rep'),
  (2, 'Sales Manager'),
  (3, 'Admin');

/*!40000 ALTER TABLE `roles` ENABLE KEYS */;

UNLOCK TABLES;
```

```
DROP TABLE IF EXISTS `task_status`;

CREATE TABLE `task_status` (
  `id` int(11) unsigned NOT NULL AUTO_INCREMENT,
  `status` varchar(64) NOT NULL DEFAULT '',
  PRIMARY KEY (`id`)
) ENGINE=InnoDB DEFAULT CHARSET=utf8;

LOCK TABLES `task_status` WRITE;

/*!40000 ALTER TABLE `task_status` DISABLE KEYS */;

INSERT INTO `task_status` (`id`, `status`)
VALUES
  (1, 'pending'),
  (2, 'completed');

/*!40000 ALTER TABLE `task_status` ENABLE KEYS */;

UNLOCK TABLES;
```

```
DROP TABLE IF EXISTS `todo_desc`;

CREATE TABLE `todo_desc` (
  `id` int(11) unsigned NOT NULL AUTO_INCREMENT,
  `description` varchar(64) NOT NULL DEFAULT '',
  PRIMARY KEY (`id`)
) ENGINE=InnoDB DEFAULT CHARSET=utf8;

LOCK TABLES `todo_desc` WRITE;

/*!40000 ALTER TABLE `todo_desc` DISABLE KEYS */;

INSERT INTO `todo_desc` (`id`, `description`)
VALUES
  (1, 'Follow Up Email'),
  (2, 'Phone Call'),
  (3, 'Lunch Meeting'),
  (4, 'Tech Demo'),
  (5, 'Meetup'),
  (6, 'Conference'),
  (7, 'Others');

/*!40000 ALTER TABLE `todo_desc` ENABLE KEYS */;

UNLOCK TABLES;
```

```
DROP TABLE IF EXISTS `todo_type`;

CREATE TABLE `todo_type` (
  `id` int(11) unsigned NOT NULL AUTO_INCREMENT,
  `type` varchar(64) NOT NULL DEFAULT '',
  PRIMARY KEY (`id`)
) ENGINE=InnoDB DEFAULT CHARSET=utf8;

LOCK TABLES `todo_type` WRITE;

/*!40000 ALTER TABLE `todo_type` DISABLE KEYS */;

INSERT INTO `todo_type` (`id`, `type`)
VALUES
  (1, 'task'),
  (2, 'meeting');

/*!40000 ALTER TABLE `todo_type` ENABLE KEYS */;

UNLOCK TABLES;
```

```
DROP TABLE IF EXISTS `user_status`;

CREATE TABLE `user_status` (
  `id` int(11) unsigned NOT NULL AUTO_INCREMENT,
  `status` varchar(64) NOT NULL DEFAULT '',
  PRIMARY KEY (`id`)
) ENGINE=InnoDB DEFAULT CHARSET=utf8;

LOCK TABLES `user_status` WRITE;

/*!40000 ALTER TABLE `user_status` DISABLE KEYS */;

INSERT INTO `user_status` (`id`, `status`)
VALUES
  (1, 'active'),
  (2, 'inactive'),
  (3, 'pending approval');

/*!40000 ALTER TABLE `user_status` ENABLE KEYS */;

UNLOCK TABLES;

DROP TABLE IF EXISTS `users`;
```



```
CREATE TABLE `users` (  
    `id` int(11) unsigned NOT NULL AUTO_INCREMENT,  
    `Name_Title` varchar(30) DEFAULT NULL,  
    `Name_First` varchar(6) NOT NULL,  
    `Name_Middle` varchar(30) DEFAULT NULL,  
    `Name_Last` varchar(8) NOT NULL,  
    `Email` varchar(16) NOT NULL,  
    `Password` varchar(9) NOT NULL,  
    `User_Roles` int(11) unsigned NOT NULL,  
    `User_Status` int(11) unsigned NOT NULL,  
    PRIMARY KEY (`id`),  
    KEY `FK_USER_STATUS` (`User_Status`),  
    KEY `FK_ROLE` (`User_Roles`),  
    CONSTRAINT `FK_ROLE` FOREIGN KEY (`User_Roles`) REFERENCES `roles`  
    (`id`),  
    CONSTRAINT `FK_USER_STATUS` FOREIGN KEY (`User_Status`) REFERENCES  
    `user_status` (`id`)  
) ENGINE=InnoDB DEFAULT CHARSET=utf8;  
  
LOCK TABLES `users` WRITE;  
  
INSERT INTO `users` (`id`, `Name_Title`, `Name_First`, `Name_Middle`,  
    `Name_Last`, `Email`, `Password`, `User_Roles`, `User_Status`)  
VALUES
```

```
(1,NULL,'Johnny',NULL,'Rep','rep@test.com','123456',1,1),  
(2,NULL,'Mary',NULL,'Rep','rep2@test.com','123456',1,1),  
(3,NULL,'Suzy',NULL,'Manager','manager@test.com','123456',2,1),  
(4,NULL,'Sales',NULL,'Manager1','sm@sm.com','123456',2,1),  
(5,NULL,'Rich',NULL,'C','test@test.com','123456',1,1);
```

Project Overview: <https://soft-builder.com/en/docs/CRM/index.html>