HUN-TEC

PROJECT DOCUMENTATION

HUN-TEC GmbH

TOLDI RICHÁRD

CUSTOMER RELATIONSHIP AND EMPLOYEE MANAGEMENT

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INTRODUCTION

Welcome to our CRM application which is more then the usual CRM applications, a comprehensive solution designed to revolutionize how your organization manages both customer relationships and employee data. This documentation is your go-to resource for understanding and harnessing the full potential of our CRM application, featuring dedicated areas for Customer Management and Employee Administration.

Purpose and Goals

CRM application is a powerful tool with a dual focus: enabling seamless customer relationship management and providing robust employee data administration. Our application is crafted to:

Customer Management: Centralize customer data, streamline communication, and enhance client relationships.

Employee Administration: Simplify HR processes by efficiently managing employee information, ensuring a cohesive and productive workforce.

Customer Management Features

Multilingual Support

Utilize the CRM application in three languages: German, English, and Hungarian.

Private Contacts for Leaders

Private Contact Filtering:

Leaders can save and filter private contacts visible only to them.

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Advanced Filtering Options

- **Status Filter:**

  Filter customers based on their status (active, inactive, deleted).

- **Category Filter:**

  Categorize customers as companies, students (training participants), or self-employed individuals.

- **Company Name Filter:**

  Quickly find and display all contacts associated with a specific company name.

Geolocation and Mapping

- **Longitude and Latitude Storage:**

  Store precise geographical coordinates for customers.

- **Map Integration:**

  View customer addresses on a map.

- **Route Generation:**

  Generate routes between the user's location and the customer's address.

Customized Data Display

Label-based Information Display:

Show customer data in labeled sections for clarity and ease of understanding.

Communication Features

- **Email Communication:**
  - Send emails with attachments to individual or multiple customers.
  - Integration with Teams for direct communication.
- **Sharing Options:**

  Share customer contact information via email or Teams messages.

- **Call Functionality:**
  - Make phone calls directly from the application.
  - Choose between Teams, Skype, landline, or mobile calls.

Website Integration

Customer Website Link:

Access and check the website of the selected customer.

Customer Lifecycle Management

Registration, Modification, Deletion:

- Register new customers, modify existing records, or delete them.
- Deleted customers move to a 'deleted' status instead of being permanently removed.

Employee Management Features

Consistent Design

Maintain a consistent and visually appealing design for the employee management part of the application with unique colors.

Advanced Filtering Options

Search, Status, Department, and Company Filters:

Efficiently locate employees using a variety of filters.

Customized Data Display

Label-based Information Display:

Present employee data in labeled sections for clarity and ease of understanding.

Rating System

Leader/Manager Rating:

- Leaders and managers can rate employees in different categories such as creativity, work speed, helpfulness and more.
- Subordinates do not have access to the rating information.

Geolocation and Mapping

- **Longitude and Latitude Storage:**

  Store precise geographical coordinates for employee addresses.

- **Map Integration:**

  View the location of employees on a map.

- **Route Generation:**

  Generate routes between the user's location and the employee's home office.

Personal Information Access

Leaders/Managers Access:

Leaders and managers can view personal information of employees, including birthdays, private phone numbers, and more.

Communication Features

Call Functionality:

- Make phone calls directly from the application.
- Choose between Teams, Skype, or phone calls.

Employee Lifecycle Management

Delete and Modify Data:

Leaders and managers have the authority to delete and modify employee data.

How to Use This Documentation

Whether you're focused on strengthening customer relationships or optimizing employee administration, this documentation is structured to guide you through the day-to-day usage of the software. Explore the specific sections that align with your needs to unlock the full potential of our dual-purpose CRM application.

Let's embark on the journey of transforming the way you engage with both customers and employees!

1. System Architecture and Technology Stack

The architecture and technology stack of our CRM application have been meticulously designed to provide a seamless and secure experience for users.

1.1 Data Storage: Power Platform Dataverse

Cloud-Based Database:

The application utilizes Power Platform Dataverse as its cloud-based database.

Provided and maintained by Microsoft, this database ensures efficient and reliable data storage.

Database Access Control:

Database navigation is restricted, visible only to system administrators.

Users have read, write, and modify permissions, but not delete permissions.

All interactions with the database are performed through the application with restrictions for the users.

1.2 Application Framework: Power Apps

Power Apps Canvas App:

Our CRM application is a Power Apps canvas app created with the Power Platform.

Tailored for tablet use, it provides a cross-platform experience, accessible on mobile devices, PCs, and tablets.

1.3 Communication and Automation

Power Automate Flows:

Message sending and contact sharing functionalities are implemented using different Power Automate flows.

This ensures efficient and automated communication within the application.

1.4 AI Component: Business Card Reader

Customer Registration:

The customer registration process incorporates an AI component, a business card reader.

Users can utilize their mobile devices to read business cards, optionally autofilling relevant data.

1.5 Special Features

Address Search:

The application includes a unique address search feature.

Users can input an address during customer or employee registration, and the system automatically retrieves longitude, latitude, and additional information such as country and zip code.

2. User Guide

2.1 Welcome Page

The welcome page serves as the initial entry point for users accessing the CRM application. It features the application title and the company logo, creating a welcoming and branded experience.

2.1.1 Automatic Navigation

Timer Countdown:

- Upon opening the application, users will spend a brief moment on the welcome page.
- After 2 seconds, the application will automatically navigate to the customer page.

2.1.2 User Verification and Registration

User Existence Check:

- The software will check if the user already exists in the database.
- If not, the application will save the new user with their Microsoft account information and default data.

Role Identification:

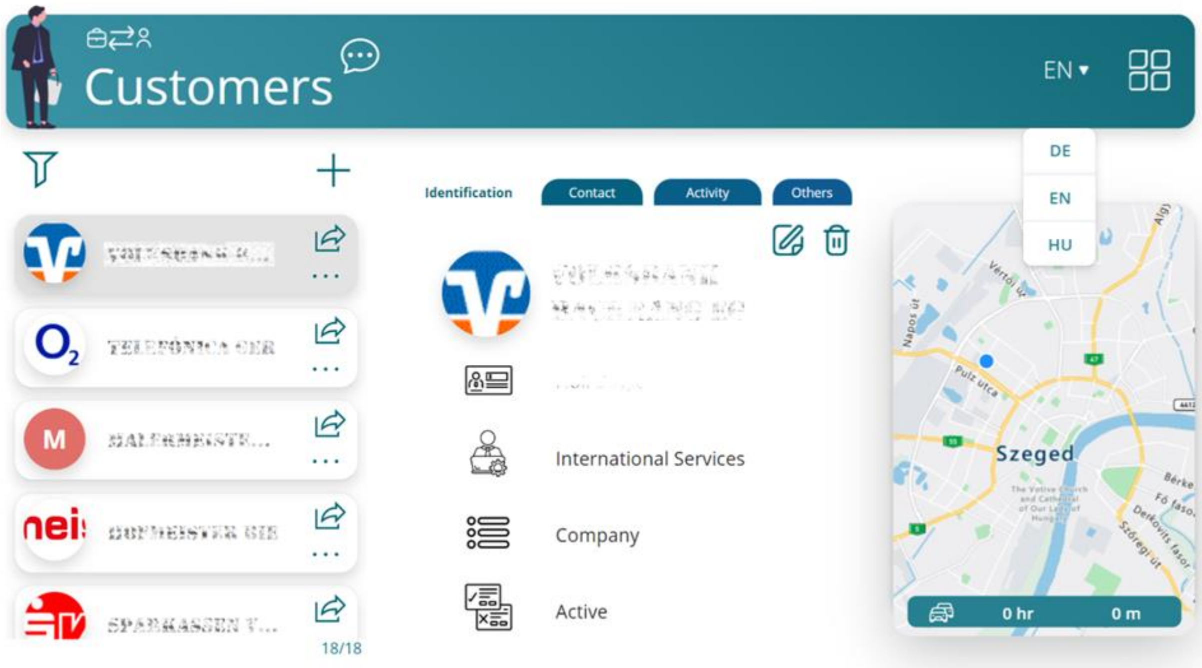
The system identifies the role of the user (leader or subordinate) based on their Microsoft account information.

2.1.3 Navigation Logic

User Status Check:

- After the timer elapses, the application checks the status of the user.
- If the user status is active, the application navigates to the customer page.
- If the status is not active (e.g., deleted or inactive), the user is redirected to an error page, indicating an issue.

2.2 CUSTOMER PAGE



The Customer Page is the primary functional interface for users to manage customer information within the CRM application.

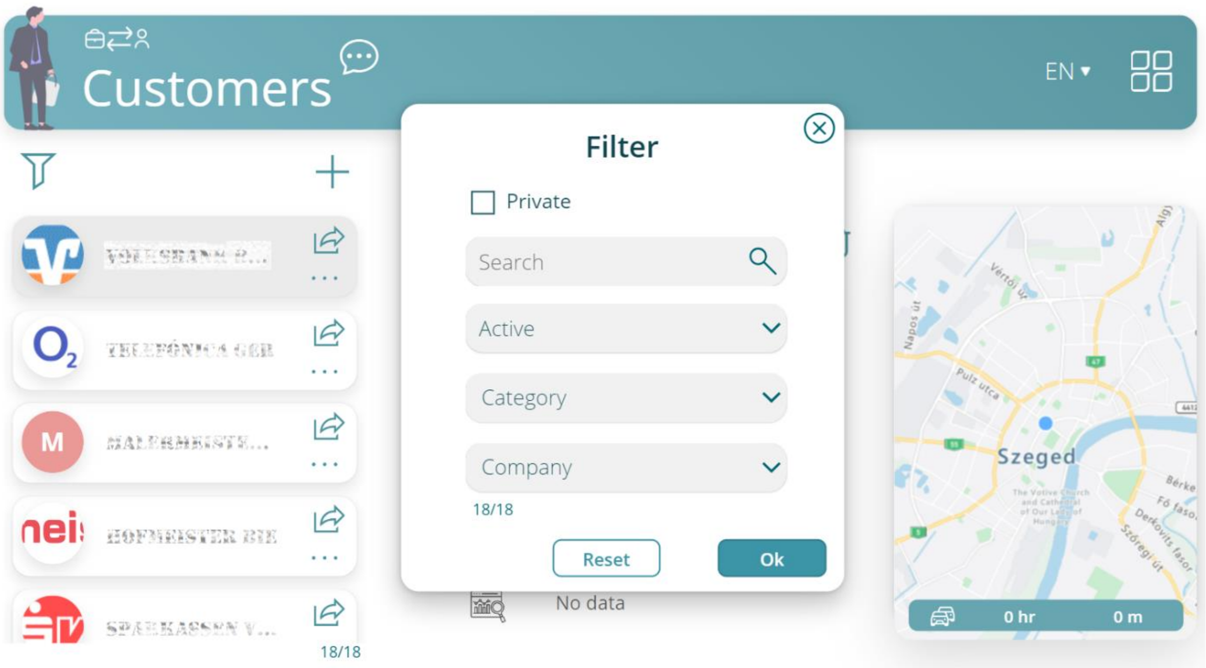
2.2.1 CUSTOMER LIST

List Display:

The page features a list of customers, providing an overview of the customer database.

Filter Options:

Users can utilize a variety of filters to refine the displayed customer list.



2.2.2 Private Contacts for Leaders

Leader Exclusive Feature:

Leaders have the ability to create private contacts, accessible only to them.

Search Functionality:

Users can search for customers based on first name, last name, company name, or customer notes.

2.2.3 Status Filtering

Customer Status Filter:

Users can filter customers based on their status (active, inactive, deleted).

2.2.4 Category Filtering

Category Filter:

- Customers can be categorized into different types (e.g., event participants, companies, self-employed individuals).
- Users can filter customers based on these categories.

2.2.5 Company Filtering

Company Filter:

- Users have the option to filter customers based on specific companies.
- For instance, selecting "Apple" would display all contacts associated with the Apple company.

2.2.6 Modification and Deletion

Update Options:

Provides options to modify customer details, ensuring the information is up-to-date.

Delete Option:

Allows the user to initiate a status delete action if needed, moving the customer to the deleted customers section without permanently losing data.

2.2.7 Identification

Company Name:

Displays the name of the company.

Company Logo:

Shows the logo of the company for visual identification.

Contact Person:

Indicates the name of the contact person at the company.

Contact Position:

Specifies the position of the contact person, such as manager or store leader.

Category:

Identifies the category of the customer, whether it's a company, self-employed individual, etc.

Status:

Displays the current status of the customer (active, inactive, deleted).

2.2.8 Contact

Work Email:

Displays the work email address of the contact person.

Work Mobile and Other Phone Numbers:

Provides contact numbers for reaching the specified person.

Website Link:

Offers a direct link to the customer's website.

Address:

Shows the address of the customer.

2.2.9 Activity

Business Activities:

Describes the business activities of the company, including services provided (e.g., cleaning, software development, construction).

2.2.10 Other Information

Headcounts:

Indicates the number of employees or individuals associated with the customer.

Language:

Specifies the primary language used by the company or person.

Education:

Displays educational information if available.

Tax Number and Statistical Number:

Shows tax and statistical numbers for billing and verification purposes.

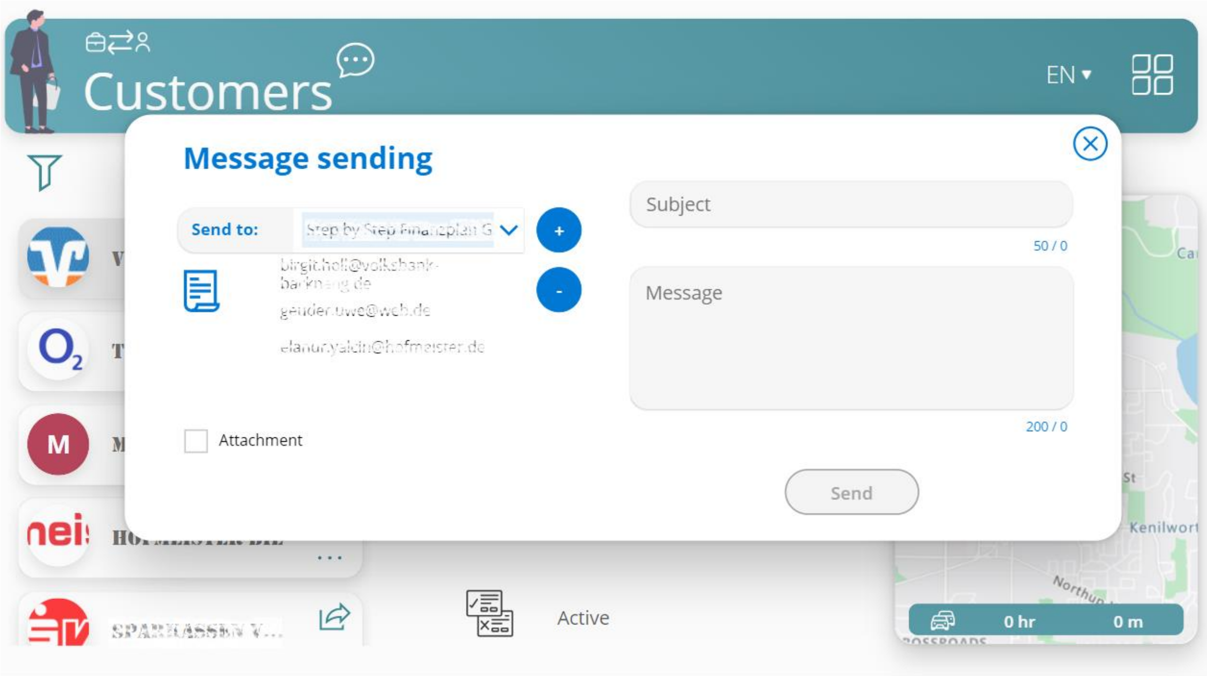
2.2.11 Modification and Deletion

Update Options:

Provides options to modify customer details, ensuring the information is up-to-date.

Delete Option:

Allows the user to initiate a status delete action if needed, moving the customer to the deleted customers section without permanently losing data.



2.2.12 Email Feature

At the end of the Customer Page title, a speech bubble icon provides users with the option to initiate email communication for multiple customers.

Selecting Multiple Customers:

Users can choose multiple customers from the list.

Subject and Message:

Once customers are selected, users fill in the subject and message for the email.

Attachment Functionality:

Users have the option to attach files to the email.

Sending the Email:

- After completing the subject, message, and any desired attachments, users can send the email.
- This feature streamlines communication, allowing users to efficiently send messages to selected customers directly from the CRM application.

2.2.13 Language Change

Language Option:

At the end of the header, users can find an option to change the language of the application.

Default Language:

The default language is set to German.

Language Options:

Users can choose between English and Hungarian.

Language Persistence:

Once the language is changed, the application saves the preference for subsequent uses.

This feature allows users to experience the CRM application in their preferred language.

2.2.14 ERP Navigation

Navigation Button:

Adjacent to the language change option, users can find a navigation button.

ERP Navigation Page:

Clicking the navigation button directs the user to the ERP navigation page.

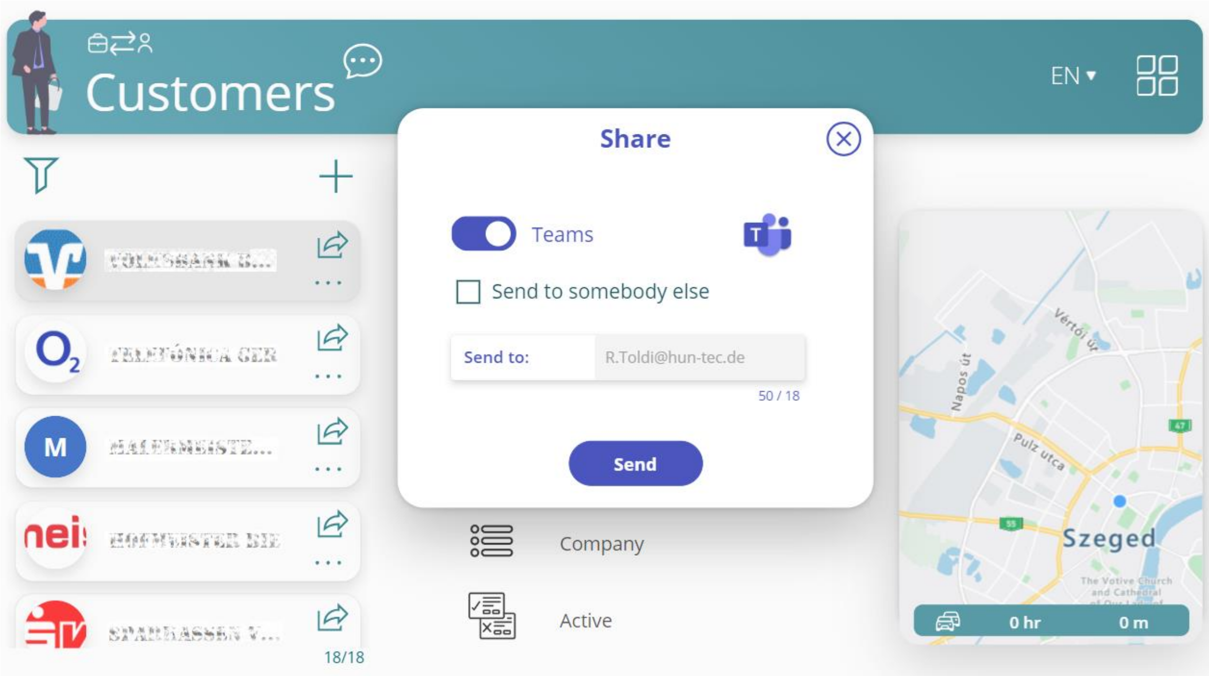
Access to Other Applications:

Users can enter various applications, such as leave management, address management, budget tracker leader module, budget tracker mobile application, and more.

Expanding Features:

Future expansions may include applications for project management and analytics software, providing comprehensive ERP systems for the company.

This functionality enables users to seamlessly navigate between the CRM application and other integrated ERP systems, promoting a unified and efficient workflow.



2.2.15 Share Functionality

Share Icon:

At the end of the customer label, users will find a share icon.

Share Customer’s Contact Details:

Clicking the share icon enables users to share the contact details of a selected customer.

Options for Sharing:

Users can share details with others or send them to themselves via Teams message or email.

This feature facilitates easy sharing of customer contact information for collaboration or personal reference.

2.2.16 Customer Contact Page

Navigation to Contact Page:

Clicking the three dots icon will navigate the user directly to the customer contact page.

This option streamlines access to detailed customer information for a more in-depth view and management.

2.2.17 New Customer Registration

Plus Icon:

Above the customer list, users can find a plus icon.

Navigation to New Customer Page:

Clicking the plus icon will navigate the user to the New Customer Page.

This feature provides a streamlined process for adding new customers to the CRM application.

2.2.18 Switching to Employee Page

Switching Button:

Above the Customer Page title, the "Customer" text, there is a switching button.

Navigation to Employee Page:

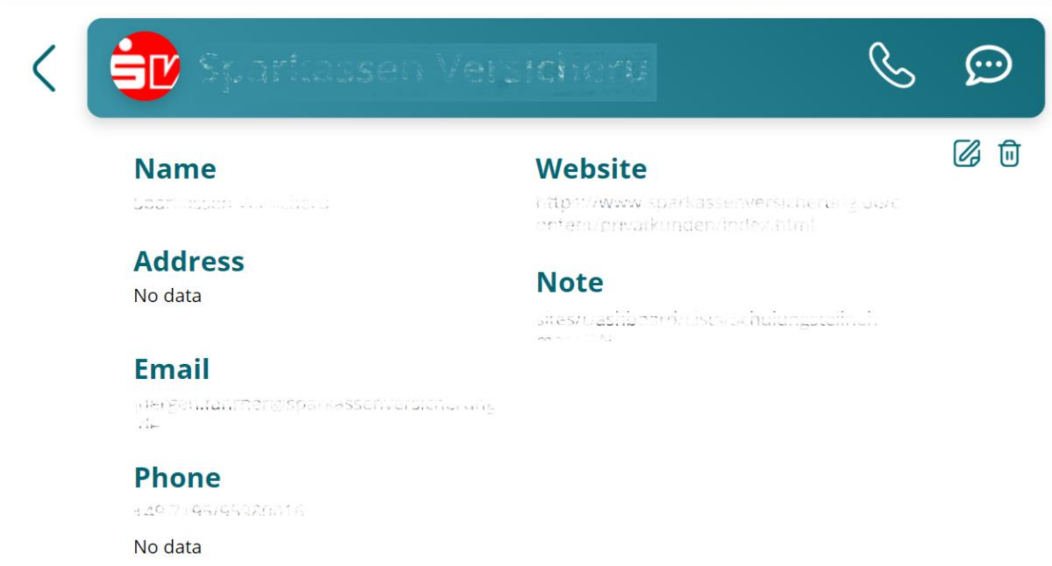
Clicking the switching button will lead the user to the Employee Page.

Visual Distinction:

The Employee Page features different colors to visually distinguish it from the Customer Page.

This switching option enables users to seamlessly transition between managing customers and employees while ensuring a clear visual indication of the active page.

2.3 Customer Contact Page



2.3.1 Customer Details

Customer Name:

Displays the name of the customer.

Address:

Shows the address of the customer.

Email Address:

Indicates the email address of the customer.

Phone Numbers:

Provides work mobile and other phone numbers for contact.

Company or Landline Number:

Displays the company or landline number of the customer.

Website:

Includes a link to the customer's website.

Note Field:

Features a small note field for additional information, such as stored files, projects, or contact person details.

2.3.2 Communication Functions

Call Function:

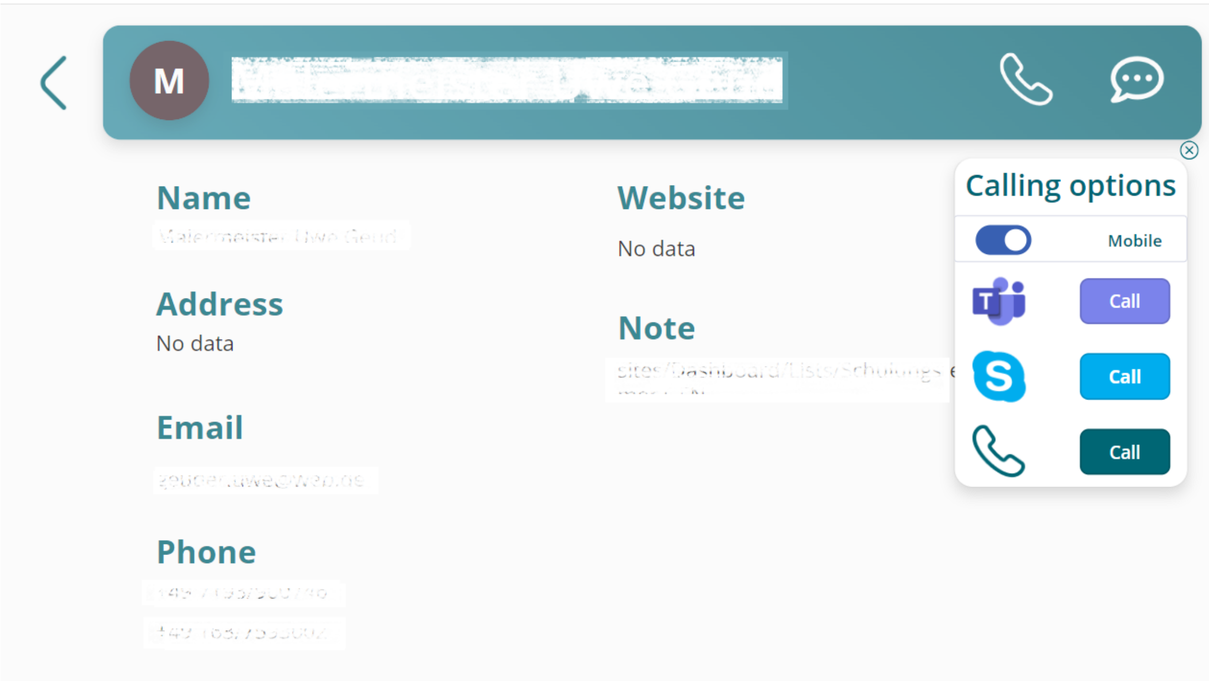
Users can initiate a call to the customer directly from the Contact Page.

Message Sending:

Users have the option to send messages to the customer.

This page serves as a central hub for accessing and managing detailed information about a specific customer, as well as facilitating direct communication with them.

2.3.3 Call Functionality



Location:

At the end of the header, users can find a phone icon.

Options for Making Phone Calls:

Clicking the phone icon provides options for making phone calls directly from the application.

Communication Platforms:

Users can choose to call the customer via Teams, Skype, or a regular phone call.

Toggle Switch:

A toggle button allows users to switch between two numbers (landline or company and mobile phone).

Availability Check:

The application checks the customer's phone numbers to determine available options.

Switching Restrictions:

- If the customer has only a mobile phone, users can use that exclusively.
- If the customer has only a landline or company number, users can use that exclusively.

Teams Calls:

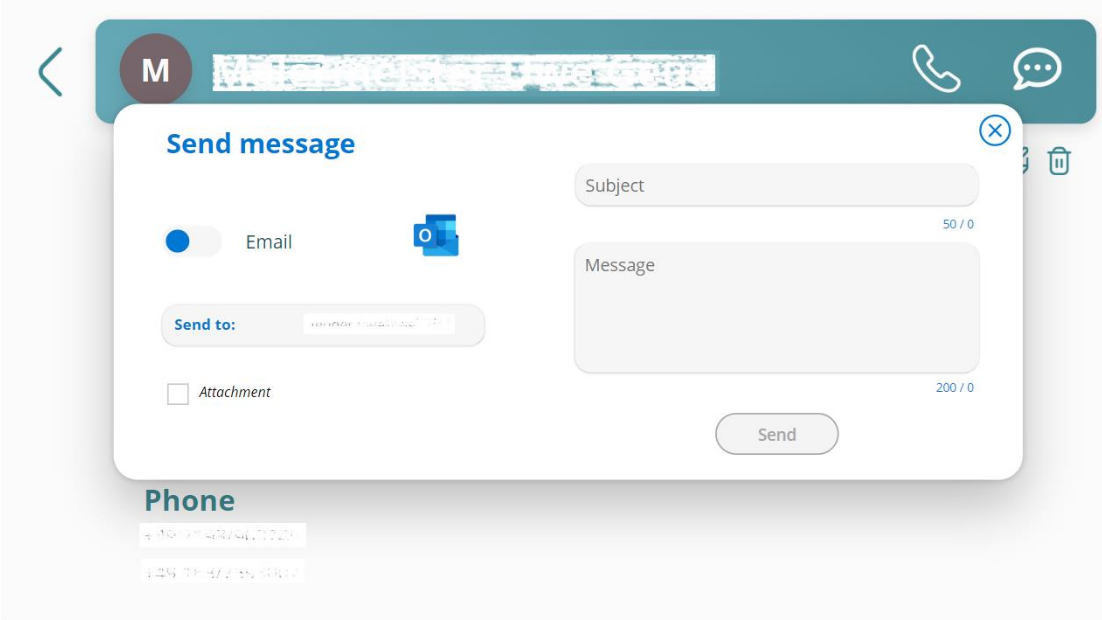
For Teams calls, the application requires the email address.

Phone Calls:

For regular phone calls, the application requires the phone number.

This feature simplifies the calling process for users, providing flexibility while respecting the available contact information for each customer.

2.3.4 Sending Email or Teams Message



Message Icon:

The contact page features a message icon, providing access to the message sending functionality.

Sending Options:

Users can send an email or a Teams message.

Attachment Support:

Users have the option to include attachments with their messages.

Prevention of Empty Messages:

The application prevents the sending of empty messages.

Recipient Limitation:

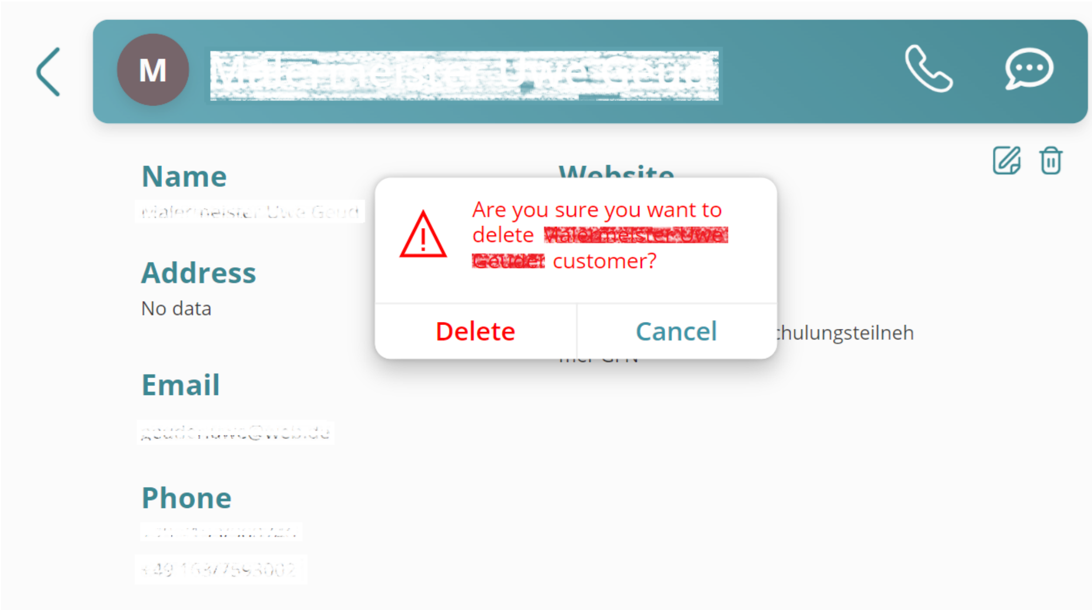
Users can send messages to the selected customer only.

Exclusivity:

Unlike the customer page message sending function, sending to multiple customers is not permitted from the contact page.

This feature allows users to communicate directly with a specific customer, ensuring clarity and exclusivity in messaging.

2.3.5 Modification and Deletion Options



Modify Icon:

Users can find a modify icon on the contact page.

Access to Customer Modification:

Clicking the modify icon provides access to modify customer details.

Update Options:

Users can update customer information if needed.

Delete Option:

The contact page includes a delete option.

Delete State:

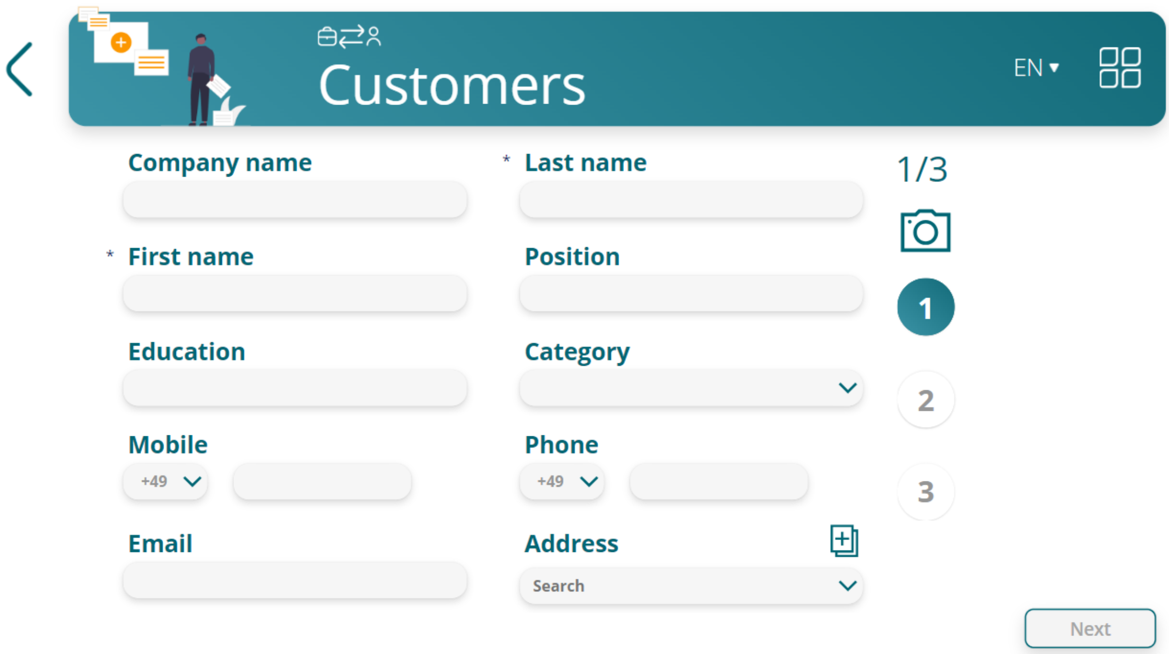
Deleting a customer does not result in data loss; instead, the customer is moved to a deleted state.

Deletion Process:

Users can initiate the deletion process if necessary.

This functionality allows users to efficiently modify customer details or manage customer records by moving them to a deleted state without permanent data loss.

2.4 Customer Registration/Edit Screen



2.4.1 Form Navigation

Page Numbers:

Near the form, users can see the page numbers indicating the current page.

Page Navigation:

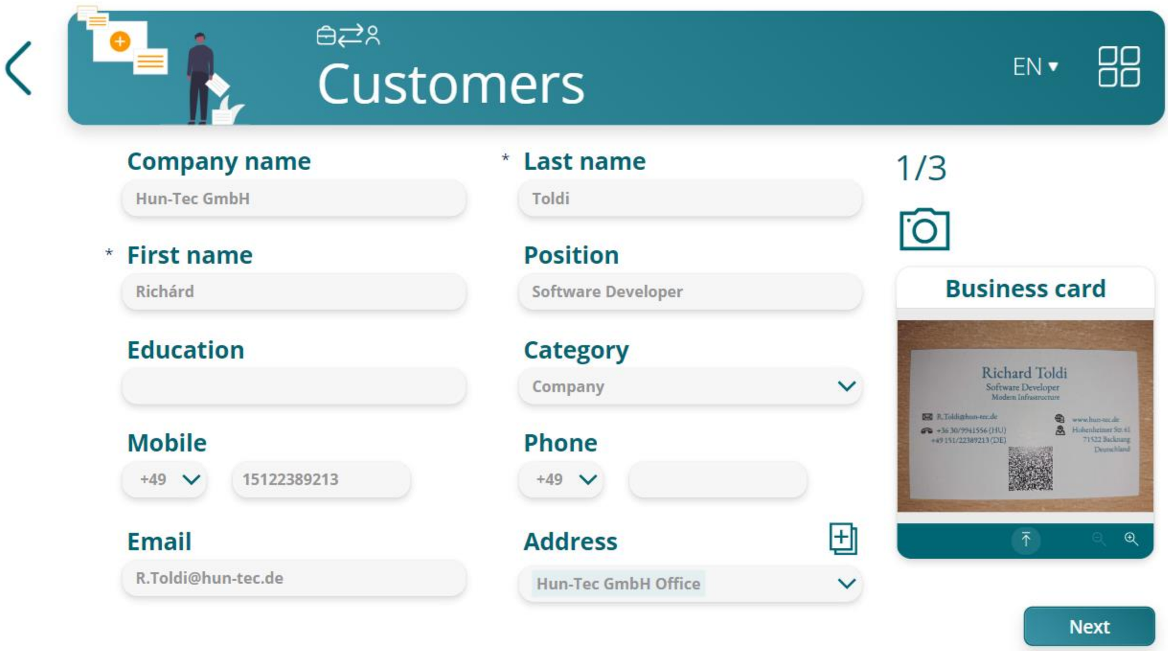
Users can click on page numbers to jump to specific pages.

Next Button:

A next button is available for progressing through the form.

Button Activation:

The next button is disabled until the required fields are filled.



2.4.2 Business Card Reader

Business Card Reader Activation:

Clicking the camera icon activates the business card reader.

AI Data Extraction:

Users can upload a business card image or take a photo.

Automated Data Filling:

The AI reads the information and automatically populates the customer's data in the input fields.

This feature enhances the efficiency of customer registration by automating the data entry process using the business card reader.

2.4.3 Address Field Functionality

Integration with Address Management:

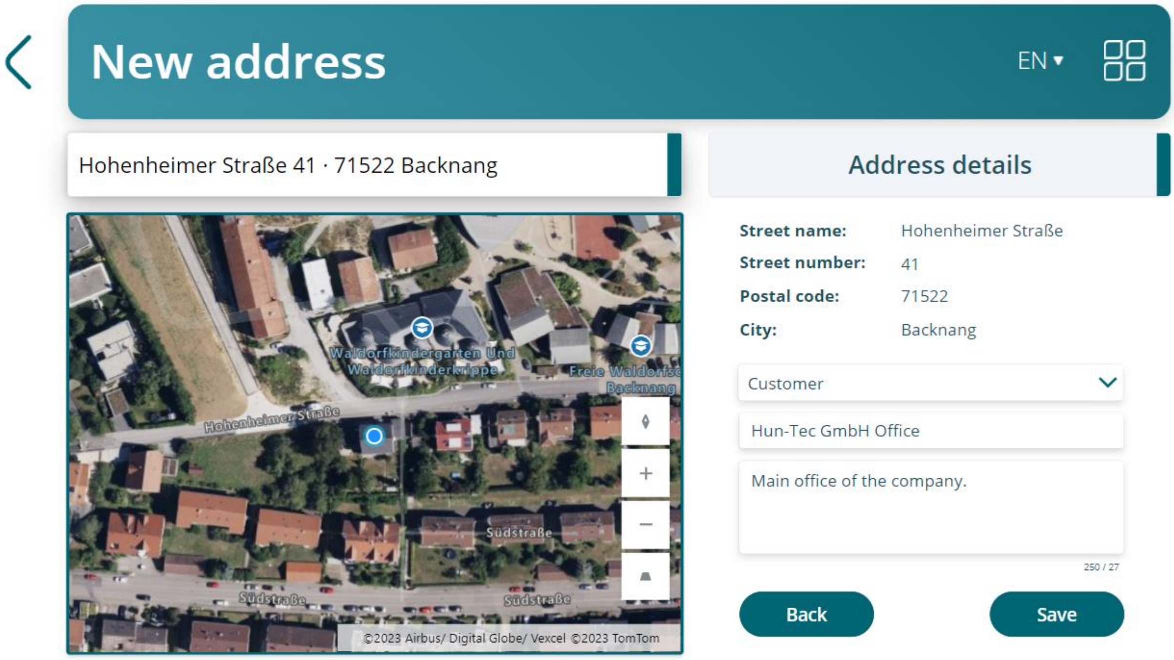
The address field has a special function that integrates with the Address Management application and database.

Saved Addresses:

Users can search from saved addresses within the application.

Registering New Addresses:

Clicking the + icon above the address dropdown navigates the user to the Address Register Screen.



2.4.4 Address Register Screen

Top Input as Address Search:

The top input on the Address Register Screen works as an address search.

Autocomplete Options:

As the user types, the application searches for matching addresses and provides autocomplete options.

Populating Specific Information:

Choosing a specific address populates relevant information such as country code, name, city name, zip code, etc.

Category and Name Assignment:

Users can assign a category to the address (e.g., office, main office).

Additional Notes:

Users can add a name (e.g., Hun-Tec GmbH company main office) and notes for additional information.

This functionality streamlines the address entry process, providing users with options to search from saved addresses or register new ones with additional details for better organization.

2.4.5 Homepage, Tax Number, and Statistics Number

Homepage:

Users can save the customer's homepage.

Tax Number:

The option to input the customer's tax number.

Statistics Number:

Users can input a statistics number for identifying purposes.

2.4.6 Company Information

Headcounts:

Allows users to input the headcount of the company.

Business Activities:

Provides space to input the business activities of the company.

2.4.7 Visual Elements

Logo:

Users can save the customer's logo.

2.4.8 Notes and Attachments

Notes:

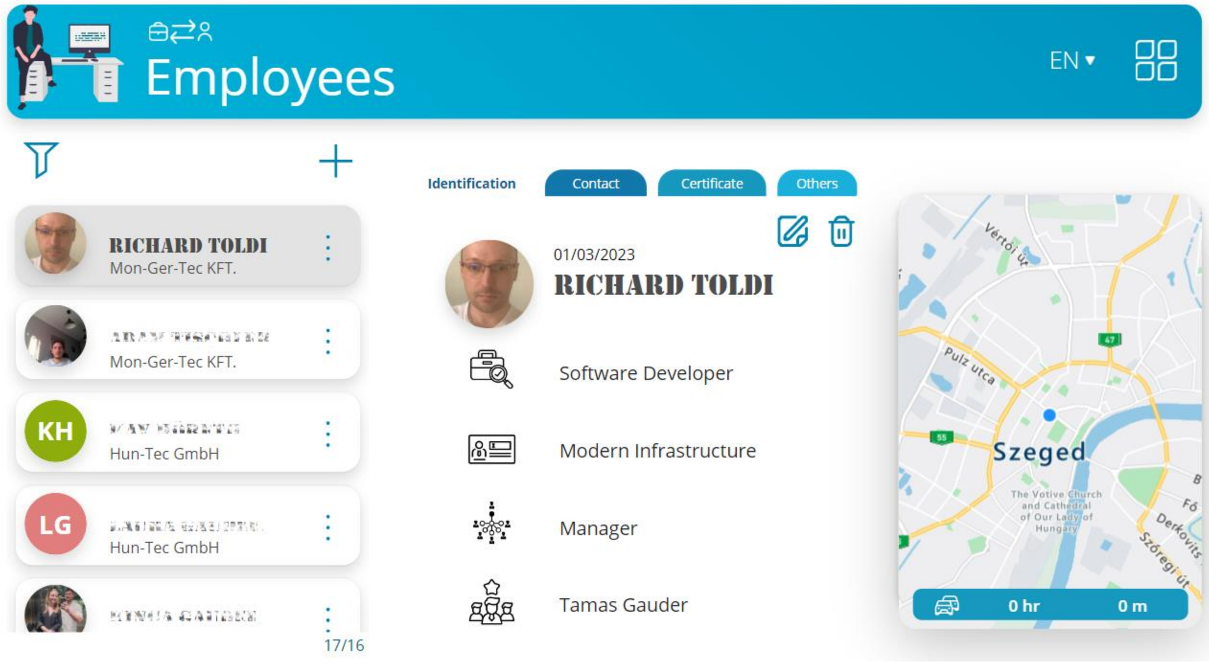
Users have the option to add notes for additional information.

Attach Files:

Provides the capability to attach files, such as agreements or other documents, to organize papers with customers.

This feature-rich form allows users to capture comprehensive details about a customer, promoting thorough customer data management and organization.

2.5 EMPLOYEE PAGE



The Employee Page shares the same structure as the Customer Page but features distinct colors. It includes:

Employee List:

Displays a list of employees for efficient employee management.

Employee Details and Ratings Labels:

Provides detailed information about each employee, including ratings, contact informations in different categories.

Map with Route Functionality:

Utilizes a map to offer a route from the user's location to the employee's address.

2.5.1 Employee Modification and Deletion

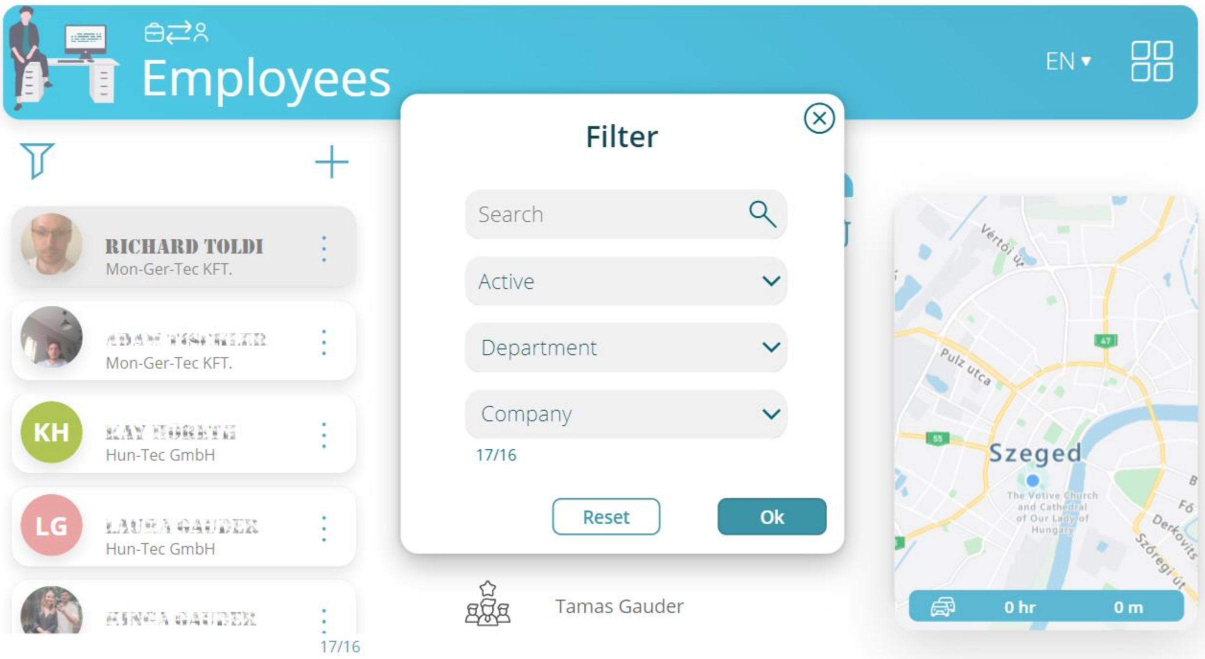
Modification:

Leaders can modify employee details as needed.

Deletion:

Leaders have the option to delete employees, with the deletion being a status change rather than permanent data loss.

This feature-rich page streamlines employee management for leaders, ensuring a comprehensive view of employee details and easy access to modification and deletion options.



2.5.2 MULTI-LEVEL FILTERING

Employee Name Search:

Users can search for employees by name.

Status Filter:

Provides options to filter employees by status (active, inactive, deleted).

Department Filter:

Users can filter employees by department.

Company Filter:

Includes a filter for employees based on the company, considering multiple companies in the corporation.

2.5.3 AUTOMATED FILTER OPTIONS

Dynamic Department Options:

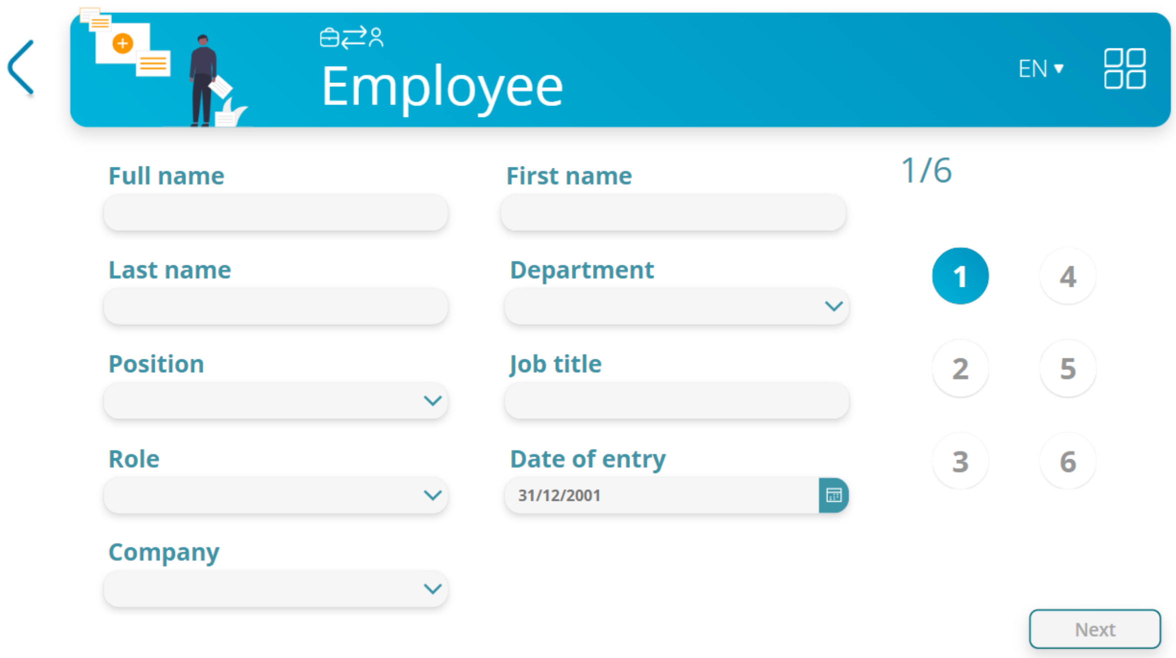
The application dynamically generates department options based on existing data in the database. Users can choose from available departments.

Dynamic Company Options:

Similarly, the application dynamically generates company options based on employee data, offering a streamlined selection process without manual entry.

This automated multi-level filtering system simplifies the search and filtering process for users, ensuring accuracy and efficiency in employee management.

2.6 Employee Registration/Edit Screen



2.6.1 Form Navigation

Multiple Pages:

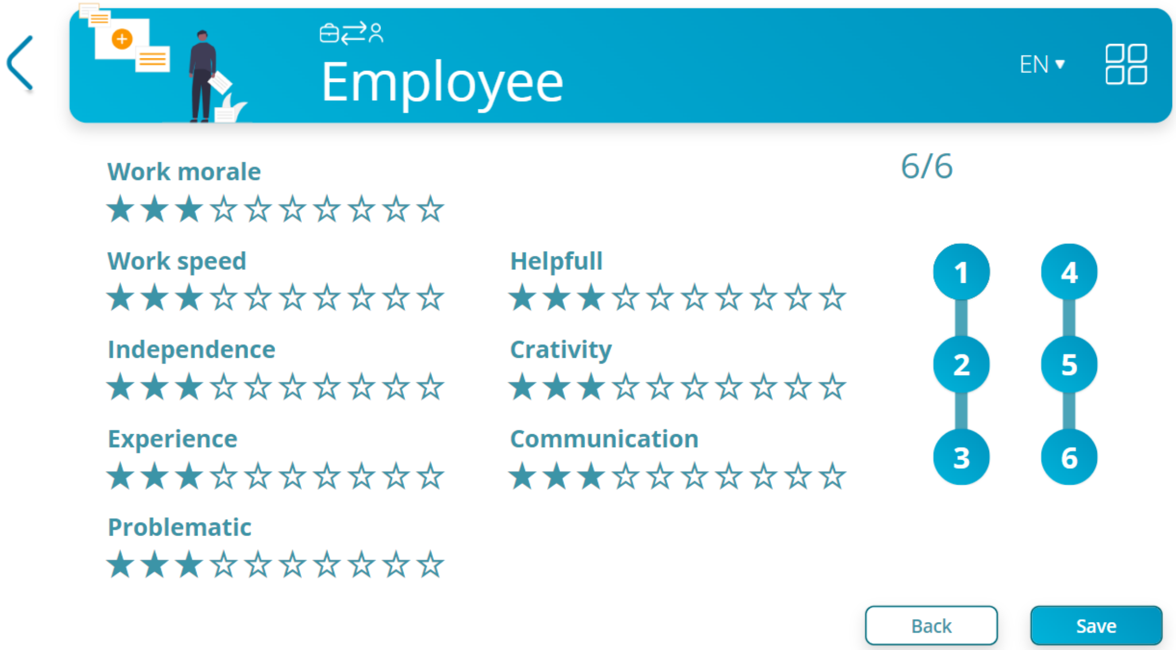
The employee registration/edit screen features six pages.

Page Navigation:

Users can switch between pages using numbered circles near the form or the next button.

Button Activation:

The next button is disabled until required information is filled in.



2.6.2 Employee Information Storage

Personal Information:

Allows storage of personal information for HR purposes.

Ratings:

Enables leaders to input and store ratings for employees.

Document Attachments:

Similar to customers, documents can be attached to employees for documentation purposes.

Educational Information:

Educational details, such as certification numbers, can be stored.

2.6.3 Address Registration

Similar to Customer Address Registration:

The Employee Registration Page features an intelligent address search, similar to the customer registration.

Integration with Address Management:

Utilizes the address management system for efficient and accurate address registration.

Autocomplete Options:

Users can start typing an address, and the application provides autocomplete options.

Automatic Population of Information:

Choosing an address populates specific information such as country code, name, city name, zip code, etc.

This intelligent address search enhances the accuracy and efficiency of the address registration process for employees.

2.6.4 Access Restrictions

Personal Details Access:

Personal details are visible only to leaders and authorized personnel.

Subordinate Restrictions:

Subordinates have restricted options and cannot view personal information about others.

2.7 Employee Contact Page

2.7.1 Contact Details

Similar to Customer Contact Page:

The Employee Contact Page is designed similarly to the Customer Contact Page.

Contact Details Display:

Displays contact details of the employee.

Note Section:

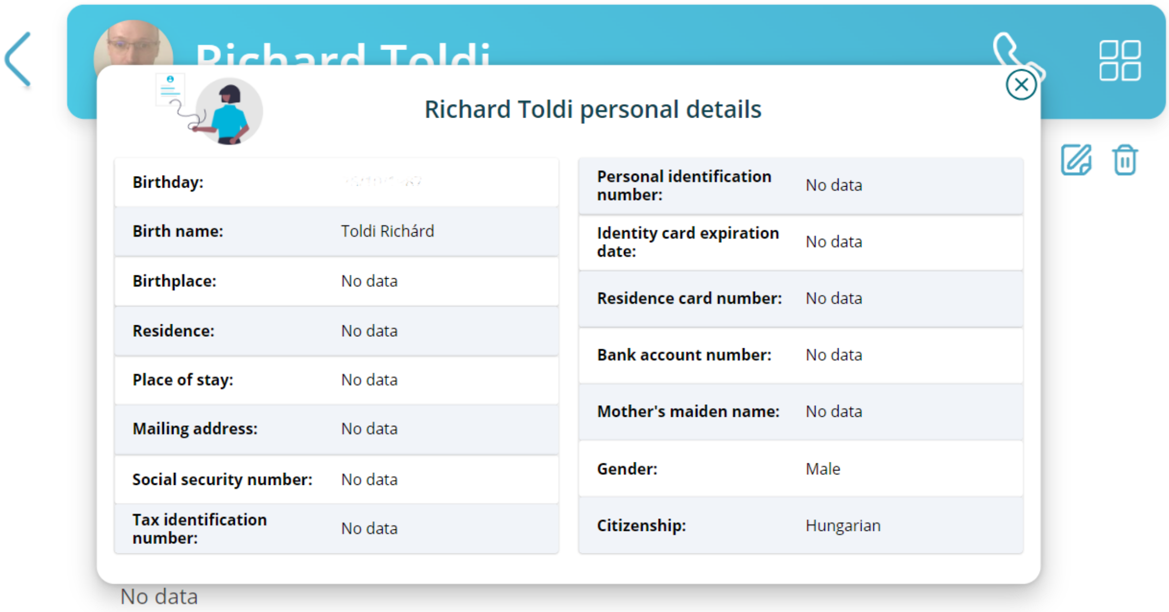
Includes a note section for additional information.

2.7.2 Communication Functions

Team Call, Skype Call, Phone Call:

Users can initiate Team calls, Skype calls, or normal phone calls directly from the application.

This page serves as a central hub for accessing and managing detailed information about a specific employee, as well as facilitating direct communication with them.



2.7.3 Personal Details Access

Access to Personal Details:

Near the Name label on the Employee Contact Page, there is an "i" icon for information.

Authorized Personnel Only:

The "i" icon is accessible only to leaders, HR, and other authorized persons.

Viewing Personal Details:

Clicking the icon provides access to personal details of the employee, such as birthday, birthplace, place of stay, etc.

This feature allows authorized personnel to access and view additional personal details of an employee for HR and management purposes.