

Table of Contents

Part 1: Project Overview	2
Part 2: Functionality	2
Part 3: Output	2
Case1: Login Page	2
Case 2: Admin Welcome page	3
Case 3: Admin adds the Lead	3
Case 4: Admin adds the Opportunity.....	6
Case 5: Admin add an Accounts.....	10
Case 6: Admin adds new Orders	13
Case 7: Business User logs in the CRM Application	17
Case 8: Main page for Business User	17
Case 9: Business User adds an Account	18
Case 10: Business User adds the Orders.....	20
Case 11: Logout.....	23

Part 1: Project Overview

This project is about the Customer Relationship Management which comprises of Sales, Marketing and Service domains. We are mainly focusing on the Sales part of the CRM process. It helps to manage the Customer base for an Organization. It helps an organization to identify its potential customers which can be converted to business.

Part 2: Functionality

Below is the functionality included in our project.

1. When the user logs in into application based on the rights different screens are loaded for the user.
2. There are 2 set of login users, Admin and Business User
3. CRUD operations implemented.
4. Used CSS styling and validations.

Part 3: Output

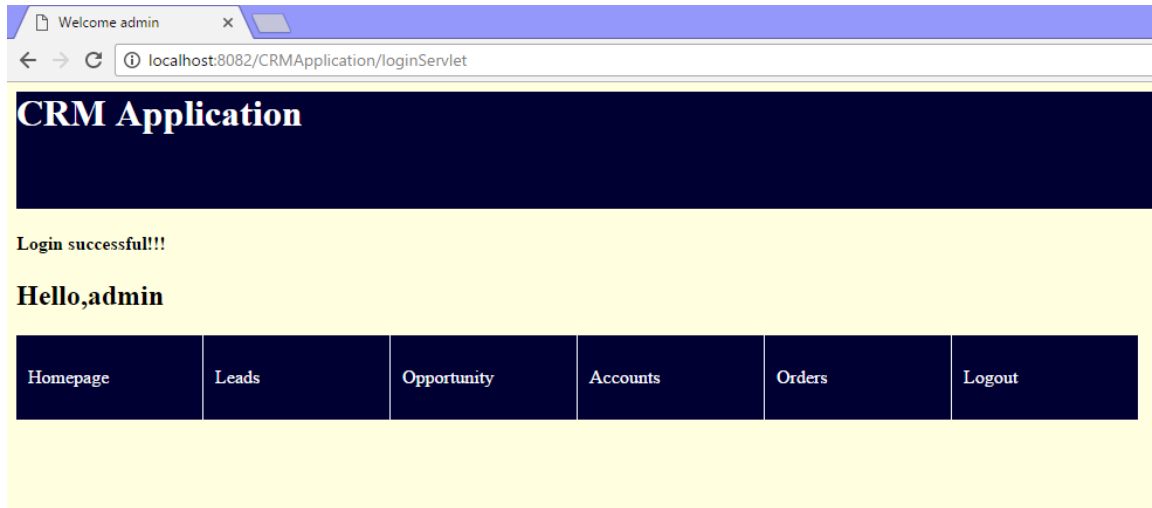
Case1: Login Page



The screenshot shows a web browser window with the title 'CRM Application'. The address bar shows 'localhost:8082/CRMApplication/'. The page has a dark blue header with the text 'CRM Application' in white. Below the header, there is a yellow background area. On the left side of this area, there is a white box with a black border containing the login form. The form has a title 'Login' and a prompt 'Please enter your user name and password:'. It includes two input fields: 'User ID' with the value 'admin' and 'Password' with masked characters '....'. A 'Login' button is located at the bottom of the form.

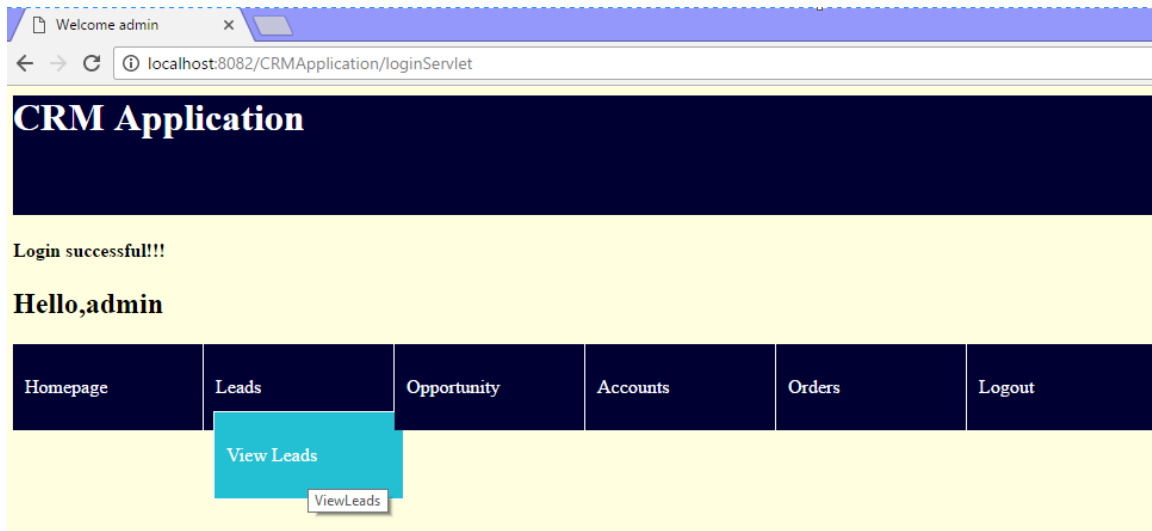
Case 2: Admin Welcome page

Admin username: admin; password: admin.



Case 3: Admin adds the Lead

Click on the Leads → View Leads from the Menu.



The records are displayed:-

Show All Leads x

localhost:8082/CRMAApplication/LeadServlet?action=listlead

CRM Application

Leads

[Add/Edit](#)
[View](#)
[Home](#)
[Logout](#)

[View](#)

LeadId	First Name	Last Name	Job Title	Company Name	Email Id	Phone No	Fax	Status	Address	State	Country	Zip	Action
1	Shreya	G	SSA	NSE	test@gmail.com	3123	12321	Active	Mumbai	India	India	39878	Update Delete
2	Vishal	Shankar	Analyst	TCS	sample@gmail.com	379284792	392847923	Active					Update Delete
3	Chander	Sharma	Manager	TCS	abc@gmail.com	3264872	291831				India		Update Delete
4	Nilesh	Kamat	Lead	JPMC	abcd@gmail.com	2179831	82136871	Inactive					Update Delete

Add a new Lead by filling the details:-

Add/Edit Leads x

localhost:8082/CRMAApplication/LeadServlet?action=insert

CRM Application

Add/Edit Leads

First Name :
 Last Name :
 Job Title :
 Company Name :
 Email Id :
 Phone No :
 Fax :
 Status :
 Address :
 State :
 Country :
 Zip :

Click on Update Link below:

Show All Leads x

localhost:8082/CRMAApplication/LeadServlet

CRM Application

Leads

Add/Edit View Home Logout

LeadId	First Name	Last Name	Job Title	Company Name	Email Id	Phone No	Fax	Status	Address	State	Country	Zip	Action
1	Shreya	G	SSA	NSE	test@gmail.com	3123	12321	Active	Mumbai	India	India	39878	Update Delete
2	Vishal	Shankar	Analyst	TCS	sample@gmail.com	379284792	392847923	Active					Update Delete
3	Chander	Sharma	Manager	TCS	abc@gmail.com	3264872	291831				India		Update Delete
4	Nilesh	Kamat	Lead	JPMC	abcd@gmail.com	2179831	82136871	Inactive					Update Delete
6	Sean	Mayers	CEO	NHT	abc@gmail.com	37826	87231683	Active					Update Delete

Update the Address, State and Country

Add/Edit Leads x

localhost:8082/CRMAApplication/LeadServlet?action=edit&leadId=6

CRM Application

Add/Edit Leads

First Name* : Sean

Last Name* : Mayers

Job Title : CEO

Company Name : NHT

Email Id : abc@gmail.com

Phone No : 37826

Fax : 87231683

Status :

Address : Chicago

State : Chicago

Country : Chicago

Zip :

Submit

The record will be updated

Show All Leads x

localhost:8082/CRMAApplication/LeadServlet

CRM Application

Leads

Add/Edit	View	Home	Logout
----------	------	------	--------

LeadId	First Name	Last Name	Job Title	Company Name	Email Id	Phone No	Fax	Status	Address	State	Country	Zip	Action
1	Shreya	G	SSA	NSE	test@gmail.com	3123	12321	Active	Mumbai	India	India	39878	Update Delete
2	Vishal	Shankar	Analyst	TCS	sample@gmail.com	379284792	392847923	Active					Update Delete
3	Chander	Sharma	Manager	TCS	abc@gmail.com	3264872	291831				India		Update Delete
4	Nilesh	Kamat	Lead	JPMC	abcd@gmail.com	2179831	82136871	Inactive					Update Delete
6	Sean	Mayers	CEO	NHT	abc@gmail.com	37826	87231683		Chicago	Chicago	Chicago		Update Delete

Delete the record

Show All Leads x

localhost:8082/CRMAApplication/LeadServlet?action=listlead

CRM Application

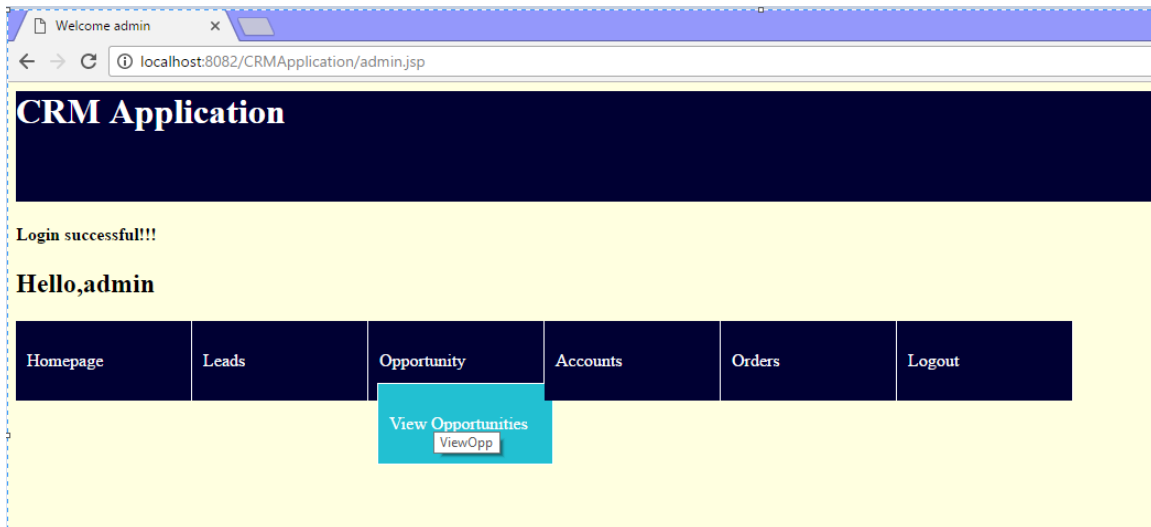
Leads

Add/Edit	View	Home	Logout
----------	------	------	--------

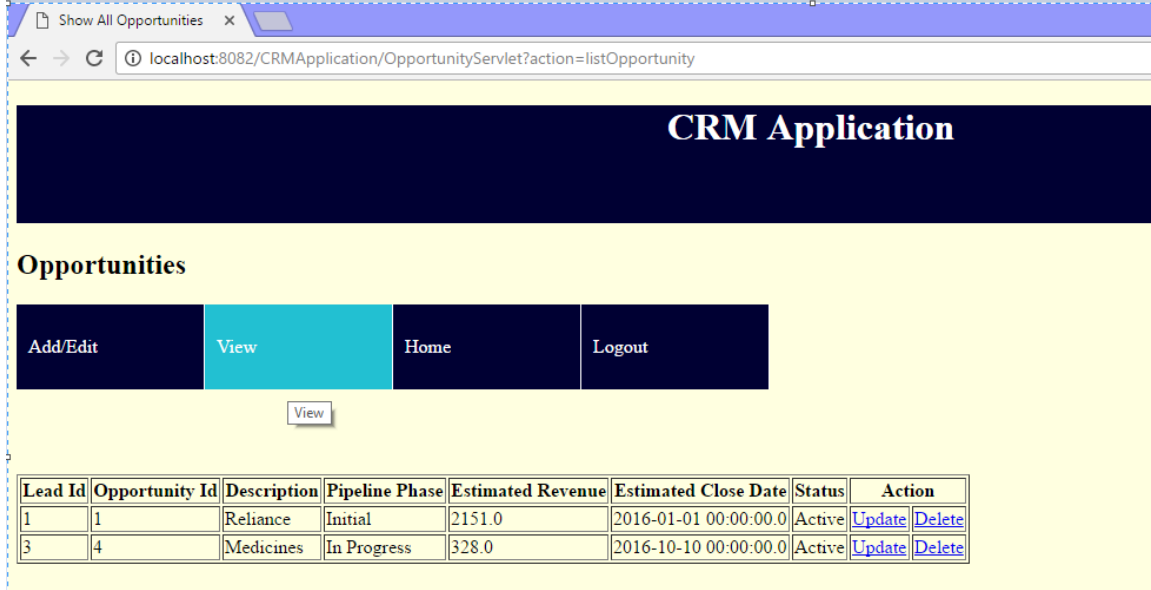
LeadId	First Name	Last Name	Job Title	Company Name	Email Id	Phone No	Fax	Status	Address	State	Country	Zip	Action
1	Shreya	G	SSA	NSE	test@gmail.com	3123	12321	Active	Mumbai	India	India	39878	Update Delete
2	Vishal	Shankar	Analyst	TCS	sample@gmail.com	379284792	392847923	Active					Update Delete
3	Chander	Sharma	Manager	TCS	abc@gmail.com	3264872	291831				India		Update Delete
4	Nilesh	Kamat	Lead	JPMC	abcd@gmail.com	2179831	82136871	Inactive					Update Delete

Case 4: Admin adds the Opportunity

Click on the Opportunity → View Opportunity menu option:-



View the Opportunities



Add a New Opportunity

Add new Opportunity x

localhost:8082/CRMApplication/OpportunityServlet?action=insert

CRM Application

Lead Name*: Nilesch ▾

Description*: Retail

Pipeline Phase: Initial

Estimated Revenue: 3671

Estimated Close Date*: dd/mm/yyyy ▾

Status: Active ▾

Submit

December 2016 ▾

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

View the newly added Opportunity:

Show All Opportunities x

localhost:8082/CRMApplication/OpportunityServlet?action=delete&Oppld=8

CRM Application

Opportunities

Add/Edit	View	Home	Logout

Lead Id	Opportunity Id	Description	Pipeline Phase	Estimated Revenue	Estimated Close Date	Status	Action
1	1	Reliance	Initial	2151.0	2016-01-01 00:00:00.0	Active	Update Delete
3	4	Medicines	In Progress	328.0	2016-10-10 00:00:00.0	Active	Update Delete
4	9	Retail	Initial	3671.0	2016-12-01 00:00:00.0	Active	Update Delete

Update the Retail record:

Add new Opportunity x

localhost:8082/CRMApplication/OpportunityServlet?action=edit&Oppld=9

CRM Application

Lead Name*: Shreya ▾
 Description*: Retail
 Pipeline Phase : Initial
 Estimated Revenue : 3100.0
 Estimated Close Date *: 01/12/2016 ▾
 Status : Active ▾
 Submit

View the updated record:

Show All Opportunities x

localhost:8082/CRMApplication/OpportunityServlet?action=listOpportunity

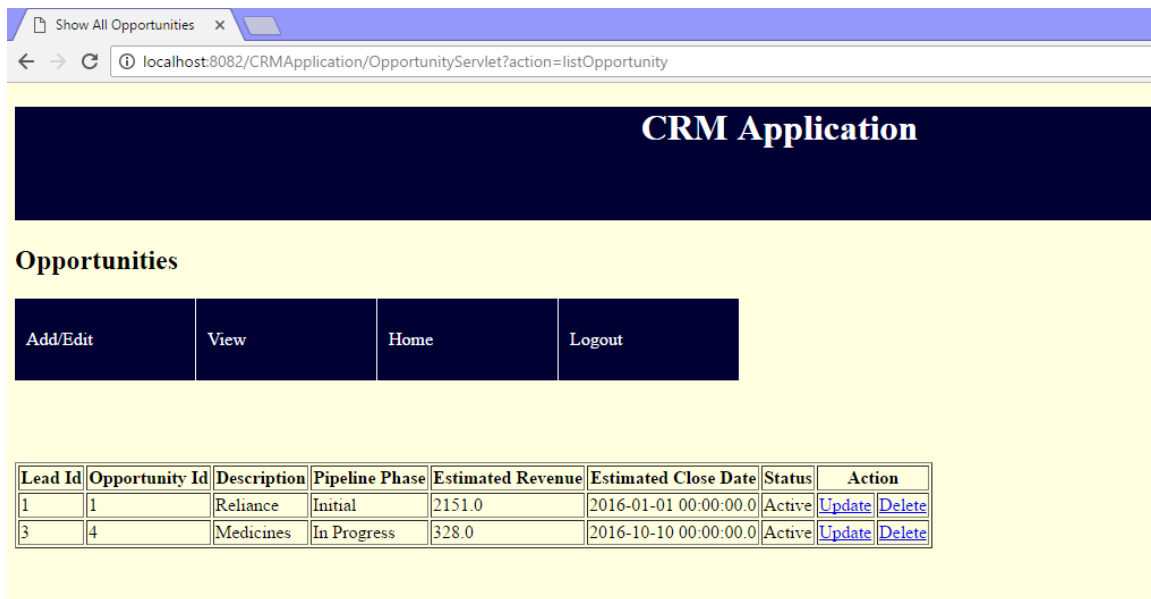
CRM Application

Opportunities

Add/Edit	View	Home	Logout
----------	------	------	--------

Lead Id	Opportunity Id	Description	Pipeline Phase	Estimated Revenue	Estimated Close Date	Status	Action
1	1	Reliance	Initial	2151.0	2016-01-01 00:00:00.0	Active	Update Delete
3	4	Medicines	In Progress	328.0	2016-10-10 00:00:00.0	Active	Update Delete
1	9	Retail	Initial	3100.0	2016-12-01 00:00:00.0	Active	Update Delete

Delete the record:



CRM Application

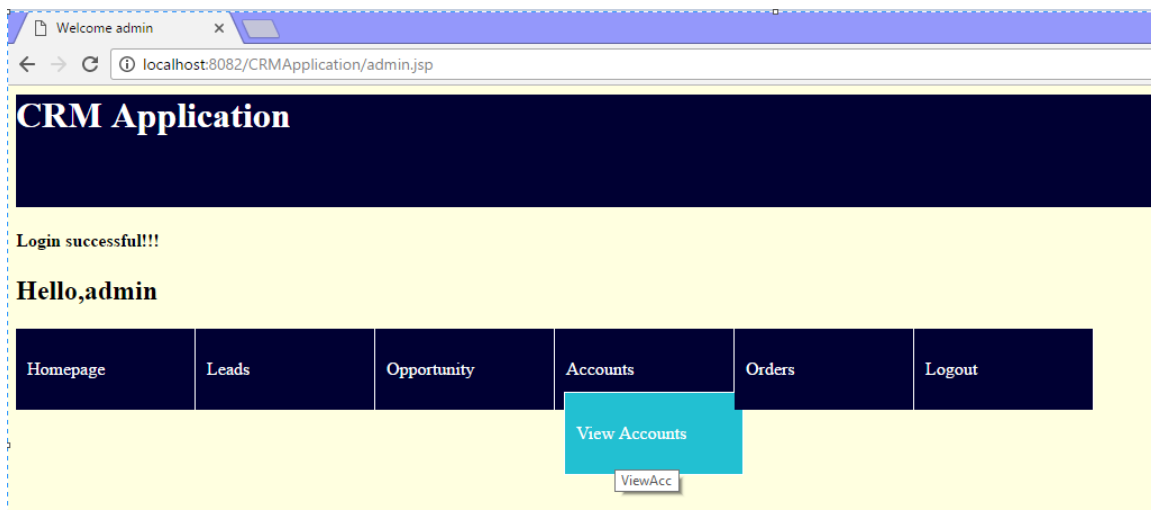
Opportunities

Add/Edit View Home Logout

Lead Id	Opportunity Id	Description	Pipeline Phase	Estimated Revenue	Estimated Close Date	Status	Action
1	1	Reliance	Initial	2151.0	2016-01-01 00:00:00.0	Active	Update Delete
3	4	Medicines	In Progress	328.0	2016-10-10 00:00:00.0	Active	Update Delete

Case 5: Admin add an Accounts

Click on Accounts → View Accounts link.



CRM Application

Login successful!!!

Hello,admin

Homepage Leads Opportunity Accounts Orders Logout

View Accounts

ViewAcc

View the Accounts:

Show All Accounts x

localhost:8082/CRMAApplication/AccountServlet

CRM Application

Accounts

Add/Edit	View	Home	Logout
----------	------	------	--------

Account Id	Opportunity Id	Account Name	Account No	Phone	Address	Email Id	Fax	Action
1	1	MRF Motors	ACC01	876287681	New York	test@gmail.com	126876821	Update Delete
4	4	Noble	ACC03	45655	California	test@gmail.com	546556465	Update Delete

Add new Account:

Add new Account x

localhost:8082/CRMAApplication/AccountServlet?action=insert

CRM Application

Add/Edit Accounts

Opportunity Description: Medicines ▼

Account Name : Textiles

Phone : 24411

Fax : 2413411

Account Number : ACC04

Email Id : abc@gmail.com

Address : Washington

The record is added

CRM Application

Accounts

Add/Edit View Home Logout

Account Id	Opportunity Id	Account Name	Account No	Phone	Address	Email Id	Fax	Action
1	1	MRF Motors	ACC01	876287681	New York	test@gmail.com	126876821	Update Delete
4	4	Noble	ACC03	45655	California	test@gmail.com	546556465	Update Delete
5	4	Textiles	ACC04	24411	Washington	abc@gmail.com	2413411	Update Delete

Update the Address from Washington to Chicago

CRM Application

Add/Edit Accounts

Opportunity Description: Reliance

Account Name*: Textiles

Phone : 24411

Fax : 2413411

Account Number*: ACC04

Email Id : abc@gmail.com

Address : Chicago

Submit

View the updated records

Show All Accounts x

localhost:8082/CRMApplication/AccountServlet

CRM Application

Accounts

Add/Edit	View	Home	Logout
----------	------	------	--------

Account Id	Opportunity Id	Account Name	Account No	Phone	Address	Email Id	Fax	Action
1	1	MRF Motors	ACC01	876287681	New York	test@gmail.com	126876821	Update Delete
4	4	Noble	ACC03	45655	California	test@gmail.com	546556465	Update Delete
5	4	Textiles	ACC04	24411	Chicago	abc@gmail.com	2413411	Update Delete

Delete the records

Show All Accounts x

localhost:8082/CRMApplication/AccountServlet?action=delete&AccId=5

CRM Application

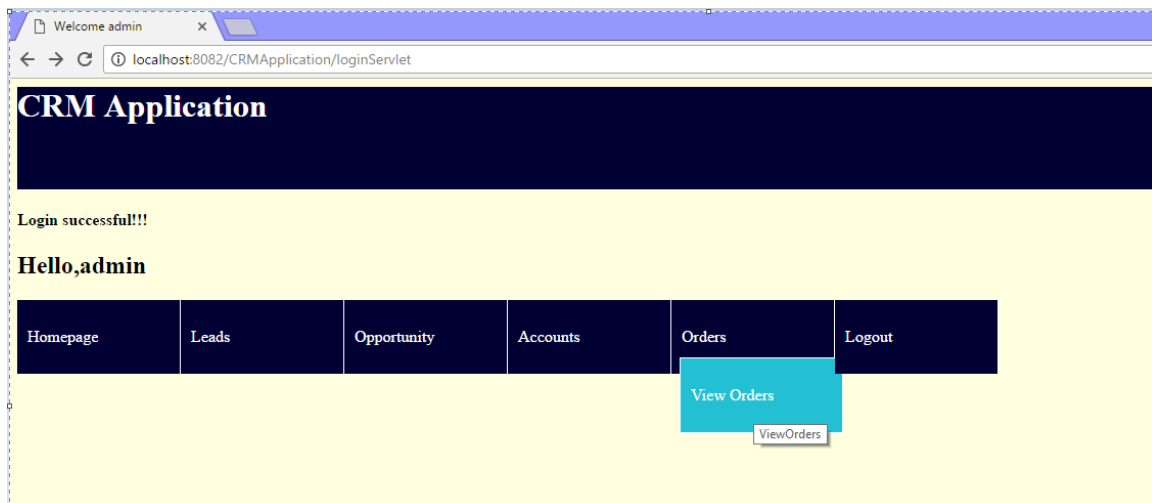
Accounts

Add/Edit	View	Home	Logout
----------	------	------	--------

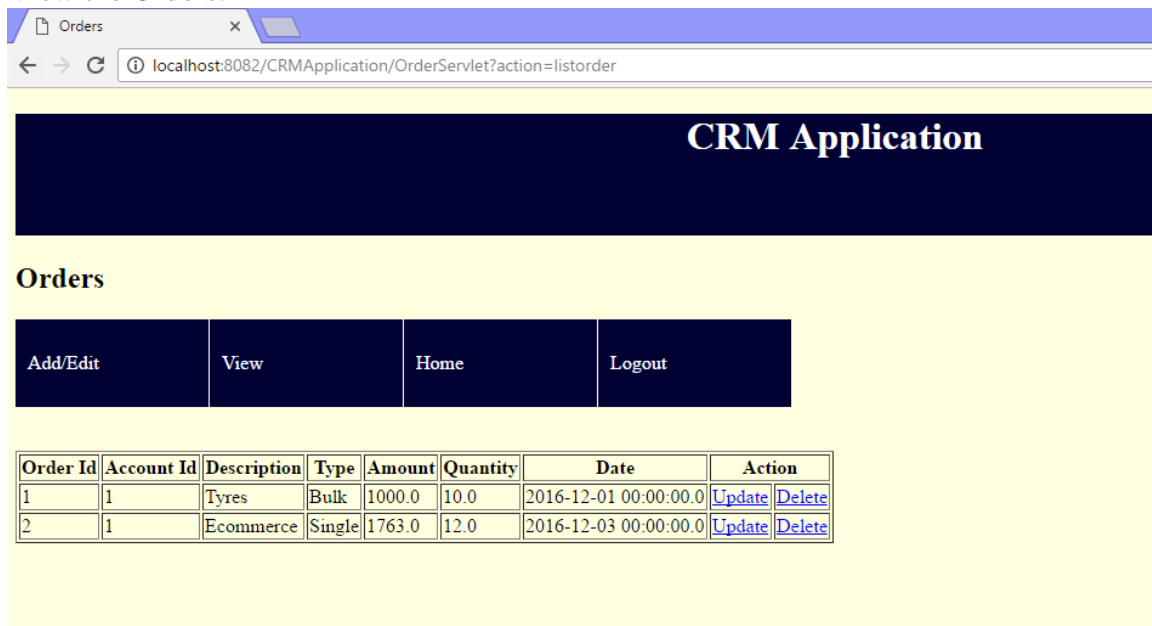
Account Id	Opportunity Id	Account Name	Account No	Phone	Address	Email Id	Fax	Action
1	1	MRF Motors	ACC01	876287681	New York	test@gmail.com	126876821	Update Delete
4	4	Noble	ACC03	45655	California	test@gmail.com	546556465	Update Delete

Case 6: Admin adds new Orders

Click on the Orders→View Orders link



View the Orders:-



Add new Order

Add New Order

localhost:8082/CRMAApplication/OrderServlet?action=insert

CRM Application

Add/Edit Orders

Account Name :

Order Description :

Order Type :

Order Amount :

Order Quantity :

Order Date (YYYY-MM-DD)*:

The new Order is added:-

Orders

localhost:8082/CRMAApplication/OrderServlet

CRM Application

Orders

Add/Edit	View	Home	Logout
----------	------	------	--------

Order Id	Account Id	Description	Type	Amount	Quantity	Date	Action
1	1	Tyres	Bulk	1000.0	10.0	2016-12-01 00:00:00.0	Update Delete
2	1	Ecommerce	Single	1763.0	12.0	2016-12-03 00:00:00.0	Update Delete
3	4	TVF	Normal	1000.0	50.0	2016-12-03 00:00:00.0	Update Delete

Update the Order amount from 1000 to 1055.

Add New Order

localhost:8082/CRMApplication/OrderServlet?action=edit&OrdId=3

CRM Application

Add/Edit Orders

Account Name : MRF Motors ▼

Order Description : TVF

Order Type : Active ▼

Order Amount : 1055.0

Order Quantity : 50.0

Order Date (YYYY-MM-DD)*: 03/12/2016

Submit

The record is updated:-

Orders

localhost:8082/CRMApplication/OrderServlet

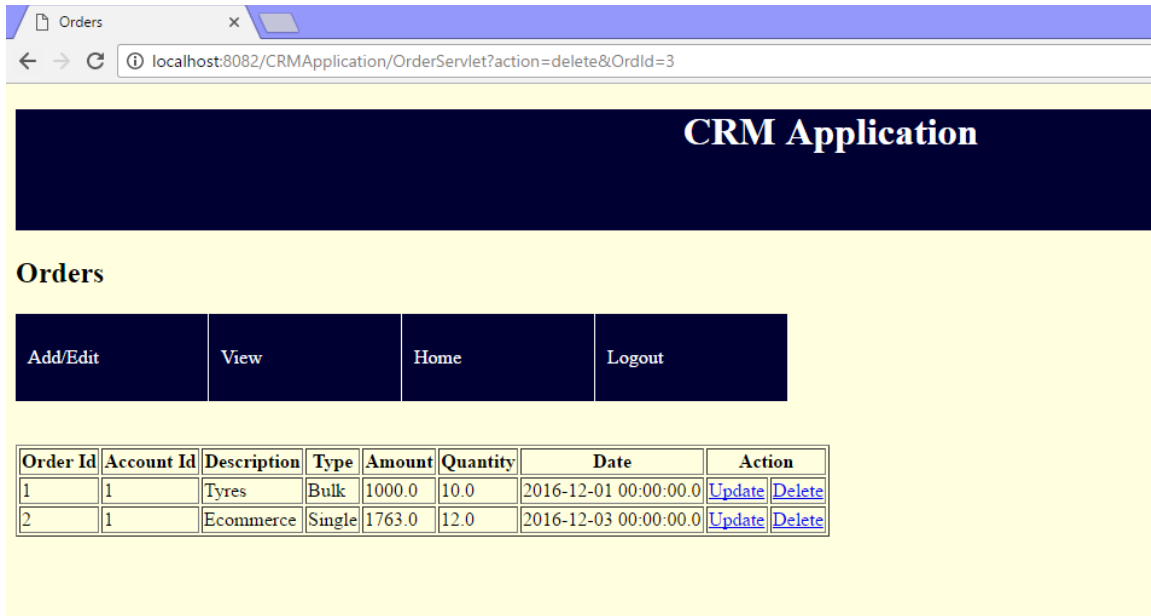
CRM Application

Orders

Add/Edit	View	Home	Logout
----------	------	------	--------

Order Id	Account Id	Description	Type	Amount	Quantity	Date	Action
1	1	Tyres	Bulk	1000.0	10.0	2016-12-01 00:00:00.0	Update Delete
2	1	Ecommerce	Single	1763.0	12.0	2016-12-03 00:00:00.0	Update Delete
3	4	TVF	Normal	1055.0	50.0	2016-12-03 00:00:00.0	Update Delete

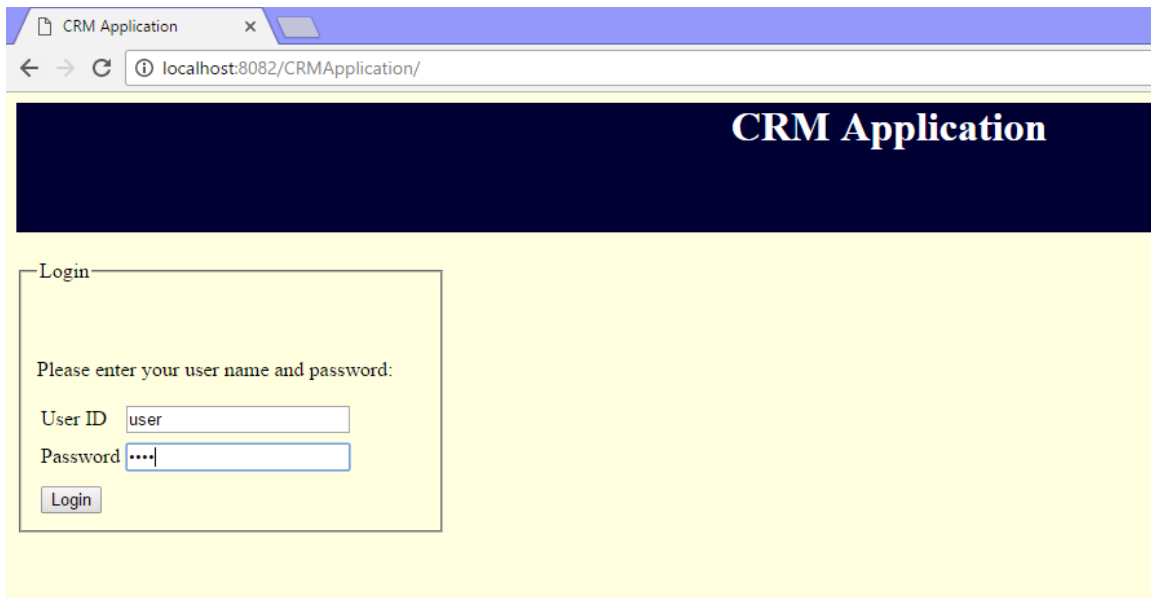
Delete the Order:



The screenshot shows a web browser window with the address bar displaying `localhost:8082/CRMApplication/OrderServlet?action=delete&OrdId=3`. The page has a dark blue header with the text "CRM Application". Below the header, the word "Orders" is displayed. A navigation bar contains four buttons: "Add/Edit", "View", "Home", and "Logout". Below the navigation bar is a table with the following data:

Order Id	Account Id	Description	Type	Amount	Quantity	Date	Action
1	1	Tyres	Bulk	1000.0	10.0	2016-12-01 00:00:00.0	Update Delete
2	1	Ecommerce	Single	1763.0	12.0	2016-12-03 00:00:00.0	Update Delete

Case 7: Business User logs in the CRM Application



The screenshot shows a web browser window with the address bar displaying `localhost:8082/CRMApplication/`. The page has a dark blue header with the text "CRM Application". Below the header, there is a "Login" section with the following form:

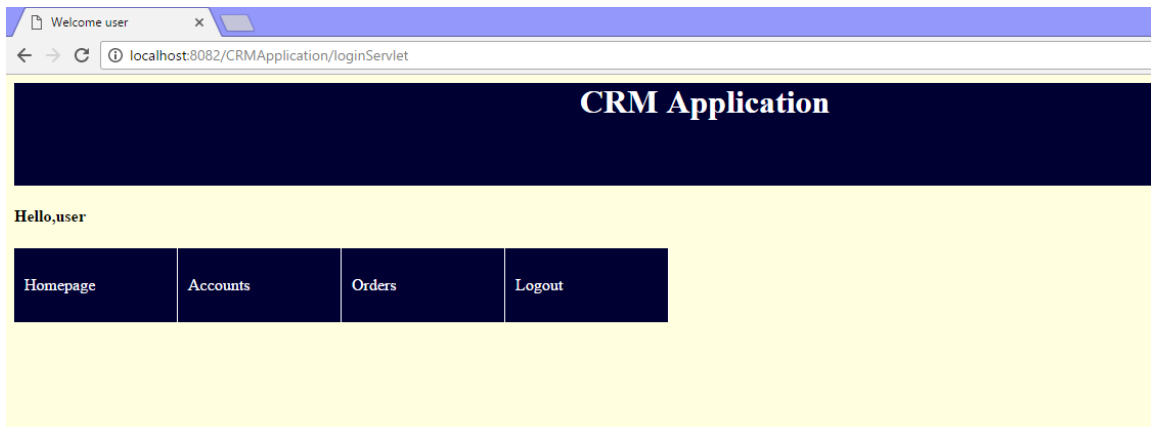
Please enter your user name and password:

User ID

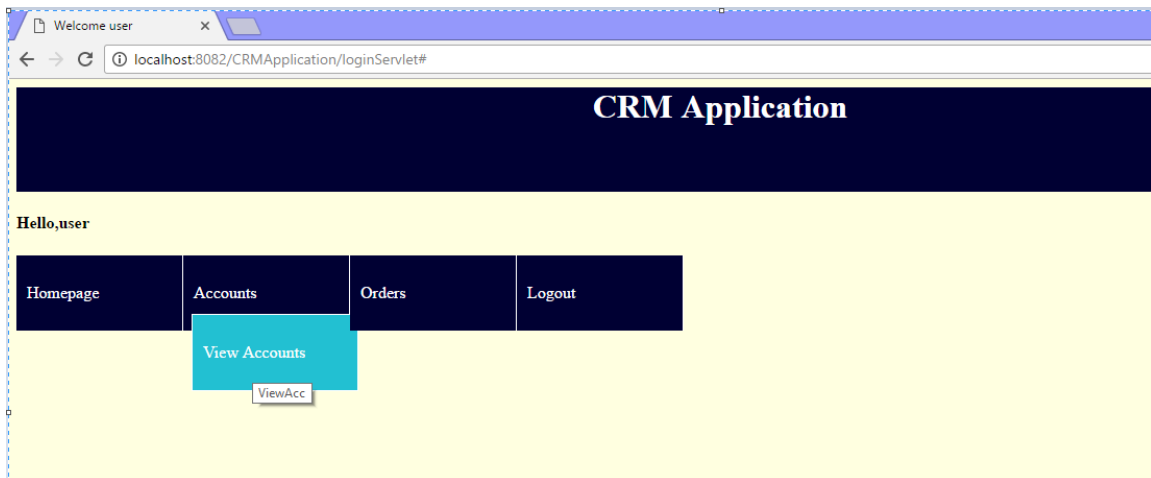
Password

UserId is "user" and Password is "user".

Case 8: Main page for Business User



Case 9: Business User adds an Account



View Accounts

CRM Application

Accounts

Add/Edit	View	Home	Logout
----------	------	------	--------

Account Id	Opportunity Id	Account Name	Account No	Phone	Address	Email Id	Fax
1	1	MRF Motors	ACC01	876287681	New York	test@gmail.com	126876821
4	4	Noble	ACC03	45655	California	test@gmail.com	546556465

Add the Account and Submit:-

CRM Application

Add/Edit Accounts

Opportunity Description: Medicines ▼

Account Name : Chemicals

Phone : 23746876

Fax : 87879

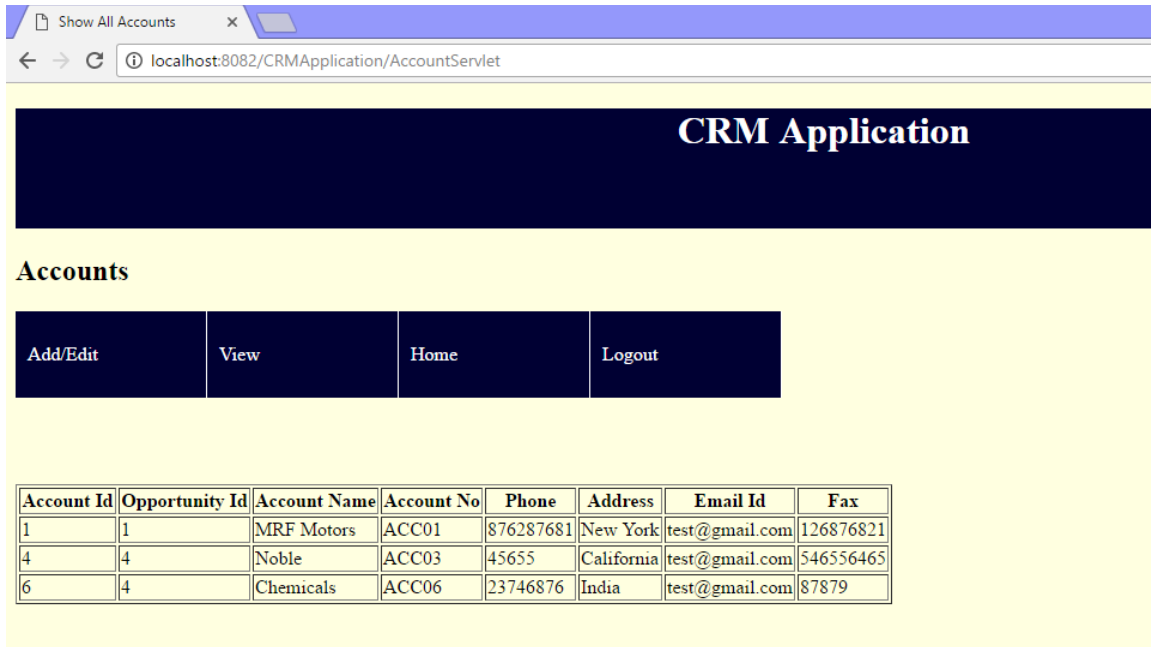
Account Number : ACC06

Email Id : test@gmail.com

Address : India

Submit

View the newly added Account



CRM Application

Accounts

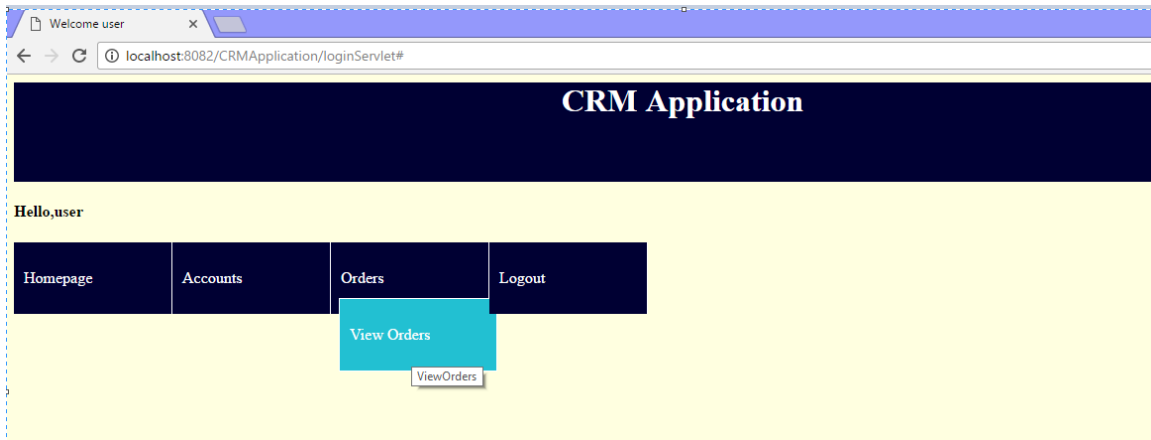
Add/Edit View Home Logout

Account Id	Opportunity Id	Account Name	Account No	Phone	Address	Email Id	Fax
1	1	MRF Motors	ACC01	876287681	New York	test@gmail.com	126876821
4	4	Noble	ACC03	45655	California	test@gmail.com	546556465
6	4	Chemicals	ACC06	23746876	India	test@gmail.com	87879

The Business does not have permissions to Update or delete the Account.

Case 10: Business User adds the Orders

Click on the Orders→View Orders link.



CRM Application

Hello,user

Homepage Accounts Orders Logout

View Orders

ViewOrders

View the Orders:-

Orders x

localhost:8082/CRMApplication/OrderServlet?action=listorder

CRM Application

Orders

Add/Edit	View	Home	Logout
----------	------	------	--------

Order Id	Account Id	Description	Type	Amount	Quantity	Date	Action
1	1	Tyres	Bulk	1000.0	10.0	2016-12-01 00:00:00.0	Update
2	1	Ecommerce	Single	1763.0	12.0	2016-12-03 00:00:00.0	Update

Add a new Order

Add New Order x

localhost:8082/CRMApplication/OrderServlet?action=insert

CRM Application

Add/Edit Orders

Account Name :

Order Description :

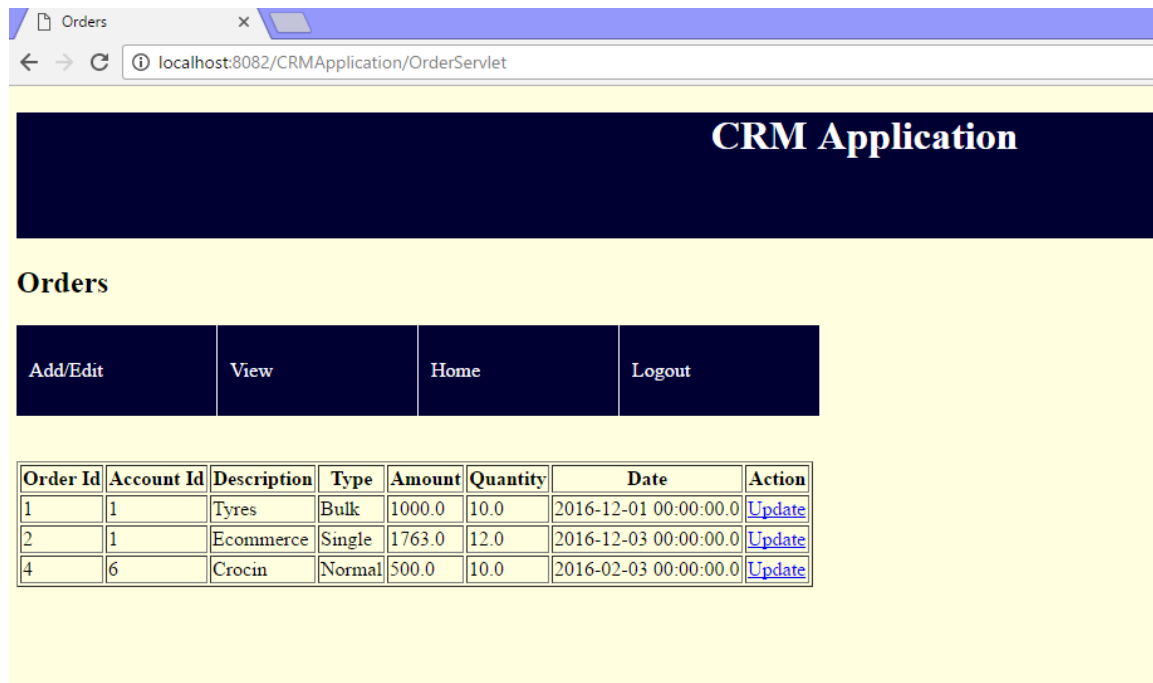
Order Type :

Order Amount :

Order Quantity :

Order Date (YYYY-MM-DD)*:

View the newly added Order

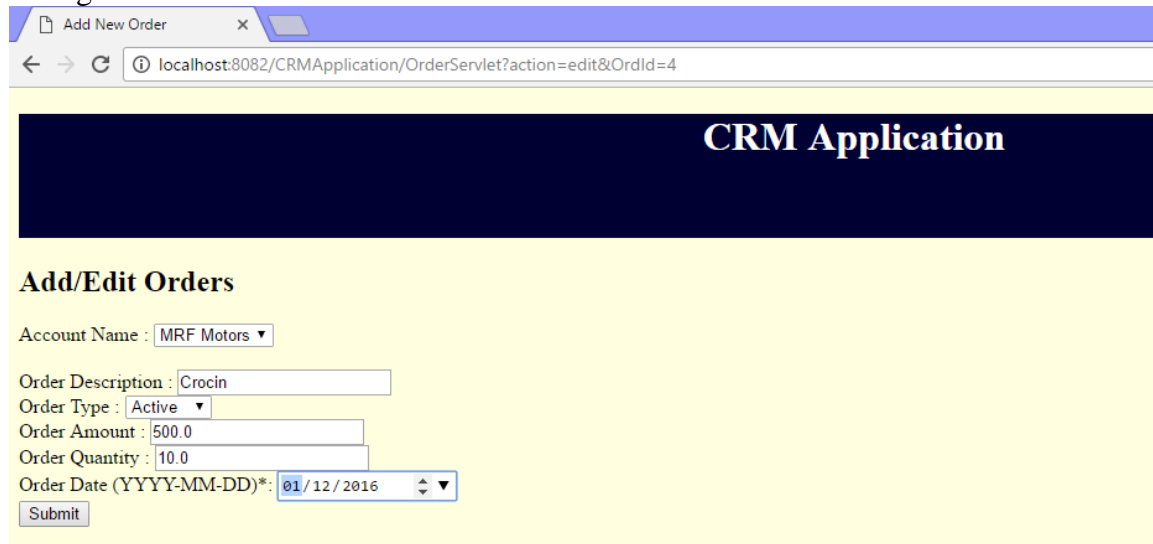


CRM Application

Orders

Order Id	Account Id	Description	Type	Amount	Quantity	Date	Action
1	1	Tyres	Bulk	1000.0	10.0	2016-12-01 00:00:00.0	Update
2	1	Ecommerce	Single	1763.0	12.0	2016-12-03 00:00:00.0	Update
4	6	Crocin	Normal	500.0	10.0	2016-02-03 00:00:00.0	Update

Change the Order Date to 01-12-2016



CRM Application

Add/Edit Orders

Account Name :

Order Description :

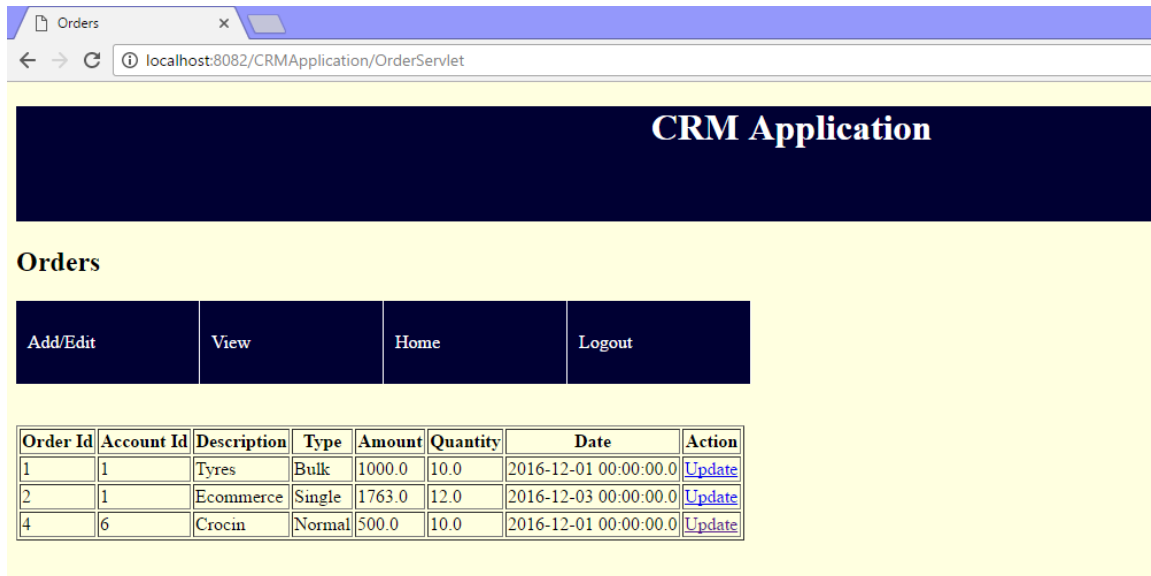
Order Type :

Order Amount :

Order Quantity :

Order Date (YYYY-MM-DD)*:

View the updated record

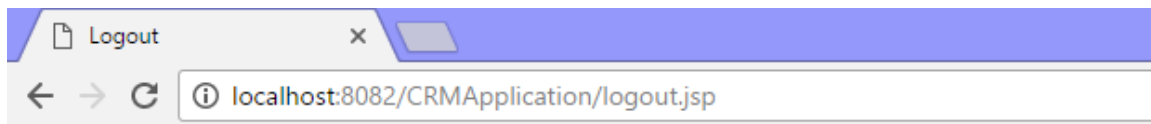


The screenshot shows a web browser window with the address bar displaying 'localhost:8082/CRMApplication/OrderServlet'. The page has a dark blue header with the text 'CRM Application'. Below the header, the word 'Orders' is displayed. Underneath, there is a navigation bar with four buttons: 'Add/Edit', 'View', 'Home', and 'Logout'. Below the navigation bar is a table with the following data:

Order Id	Account Id	Description	Type	Amount	Quantity	Date	Action
1	1	Tyres	Bulk	1000.0	10.0	2016-12-01 00:00:00.0	Update
2	1	Ecommerce	Single	1763.0	12.0	2016-12-03 00:00:00.0	Update
4	6	Crocin	Normal	500.0	10.0	2016-12-01 00:00:00.0	Update

The Business User has access to Update the Order but he/she cannot delete it.

Case 11: Logout



The screenshot shows a web browser window with the address bar displaying 'localhost:8082/CRMApplication/logout.jsp'. The page has a dark blue header with the text 'Logout'. Below the header, the text 'You have been successfully logout' is displayed.

You have been successfully logout

-----END of Final Project-----
