
Django-CRM Documentation

Release 0.3.0

Django-CRM

Sep 12, 2019

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CHAPTER 1

Introduction:

Django CRM is opensource CRM developed on django framework. It has all the basic features of CRM to start with. We welcome code contributions and feature requests via github.

Source Code is available in Micropyramid Repository() [Link](#).

CHAPTER 2

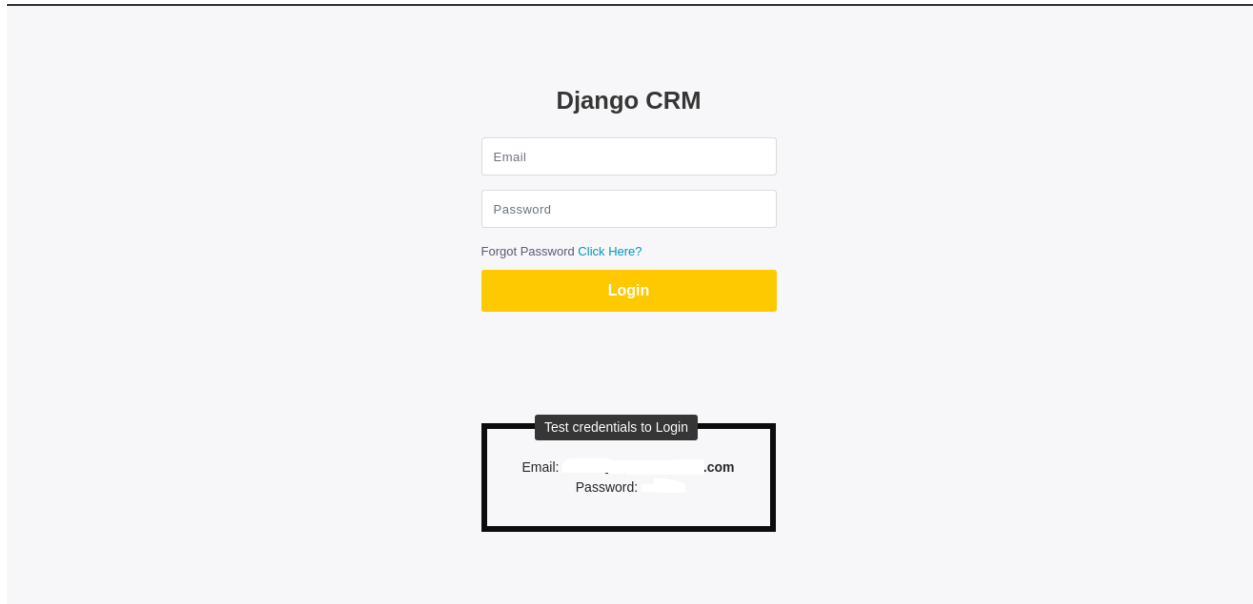
Tech stack used:

- Python ≥ 3.4
- Django ≥ 2.0
- Redis
- django-simple-pagination

Modules available in Django-CRM:

3.1 User functionalites:

3.1.1 Login



The screenshot displays the login interface for Django CRM. At the top, the title "Django CRM" is centered. Below it are two input fields: "Email" and "Password". A link "Forgot Password Click Here?" is positioned below the password field. A prominent yellow "Login" button is centered below the links. At the bottom, a black-bordered box contains the text "Test credentials to Login" above a form with "Email:" and "Password:" labels and input fields. The email field is pre-filled with ".com".

Fig Login Page

3.1.2 Forget Password

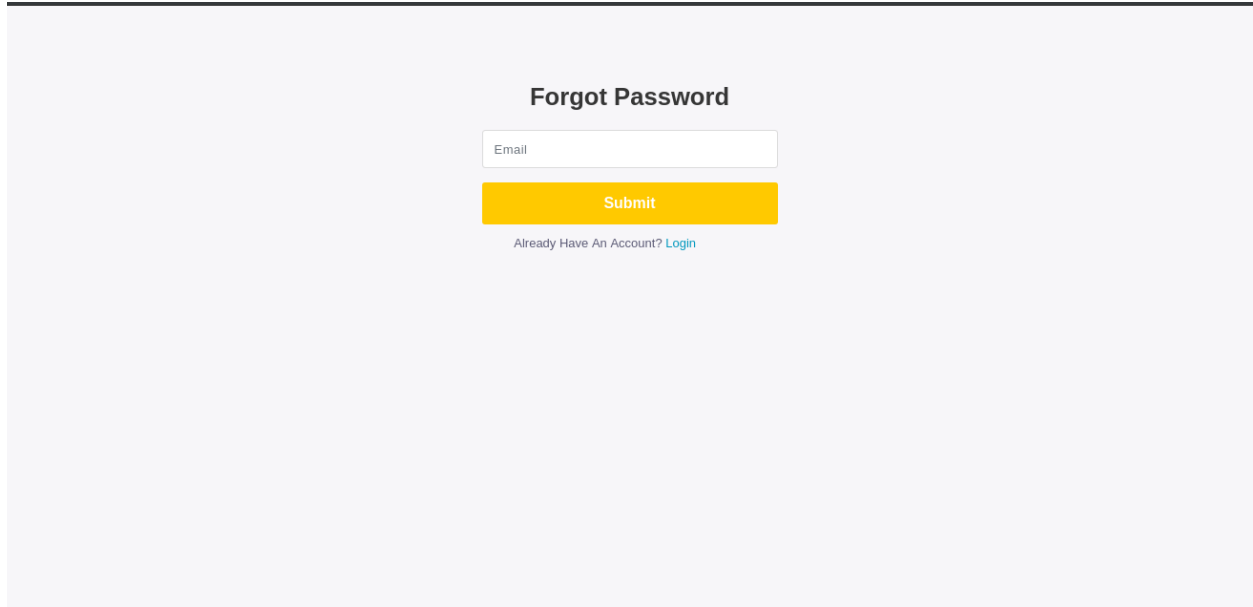


Fig Forget Password Page View

Enter the registered email id and click submit, then you will be sent a email to the registered email address, and redirect to the acknowledge page as below figure

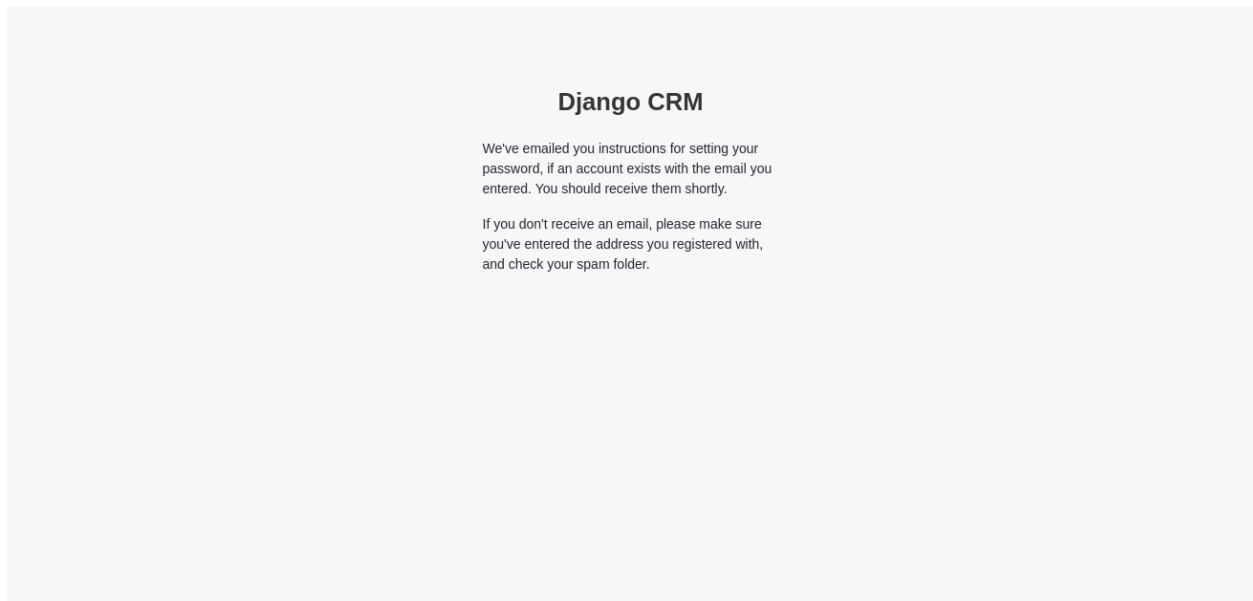


Fig Email Sent acknowledgement view

When you check the mail you will receive a email similar to the below figure.

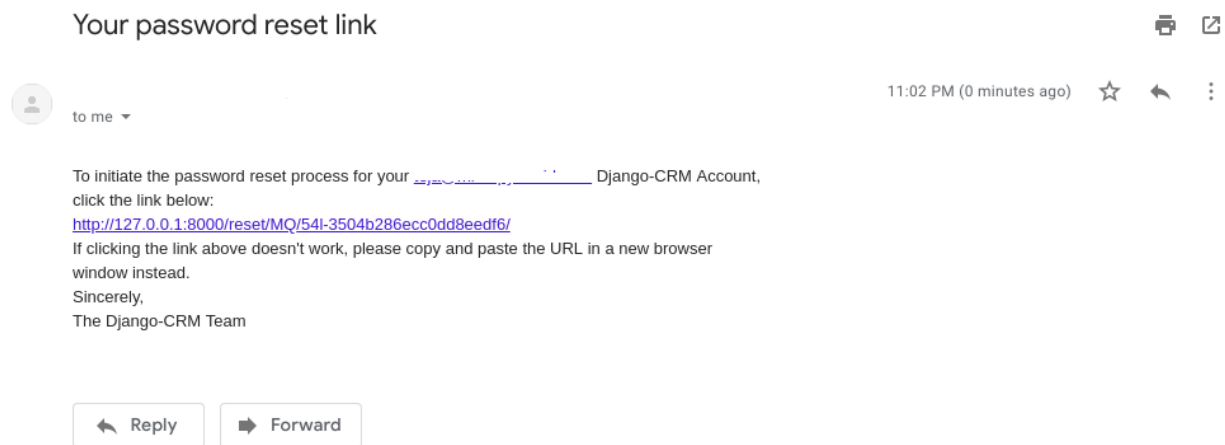


Fig Email recieved

When you click on the link in the mail, you will get a page as below

A screenshot of a web page titled "Django CRM" at the top. The main heading is "Change password". Below it, there is a form with two input fields: "New password:" and "New password confirmation:". Between these fields is a list of password requirements: "Your password can't be too similar to your other personal information.", "Your password must contain at least 8 characters.", "Your password can't be a commonly used password.", and "Your password can't be entirely numeric.". At the bottom of the form is a yellow button labeled "Change password".

Fig Password Reset view

After you successful change the password you will get below page

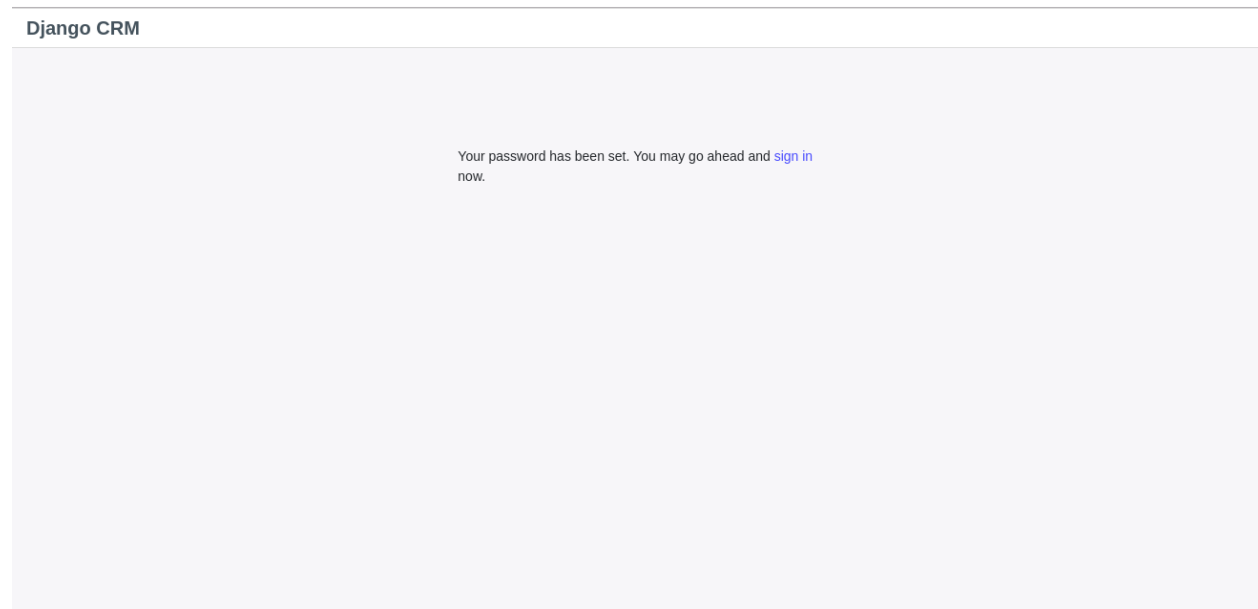


Fig Password Reset Successful view

Now click on login and enter your credentials

After successful login you will be redirected to Dashboard which looks similiar to the below figure

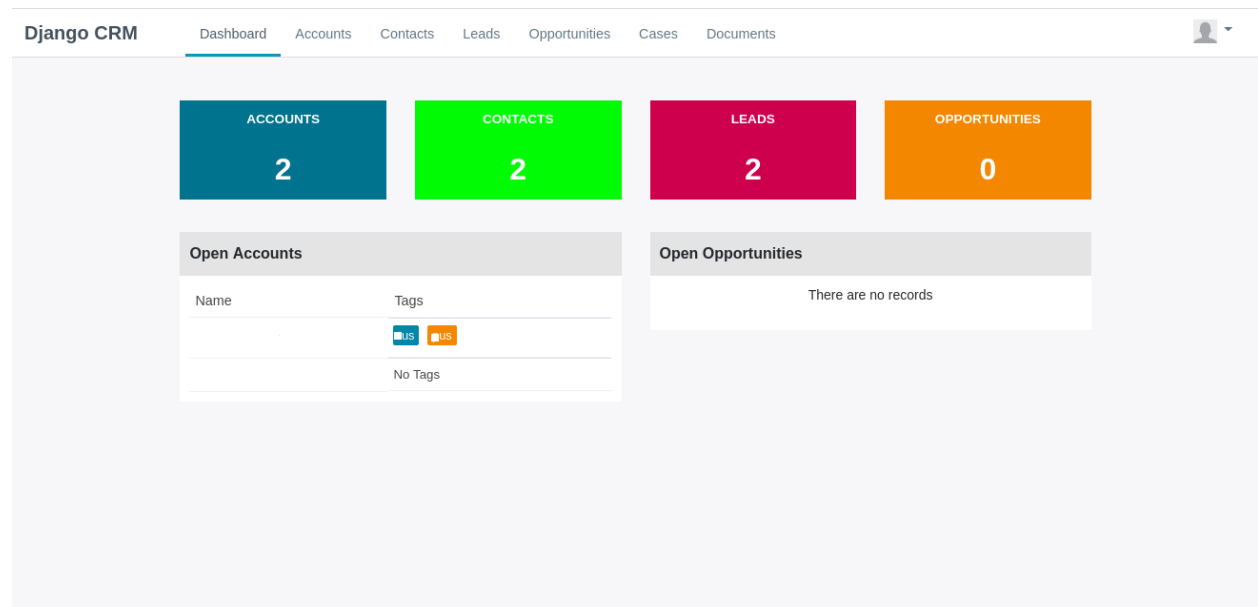


Fig Dashboard view

The home page/Dashboard have access to all the modules of the CRM

Note: The numbers below accounts, contacts, leads, opportunities represent the total count of each module.

3.1.3 Profile

Dropdown menu for user settings

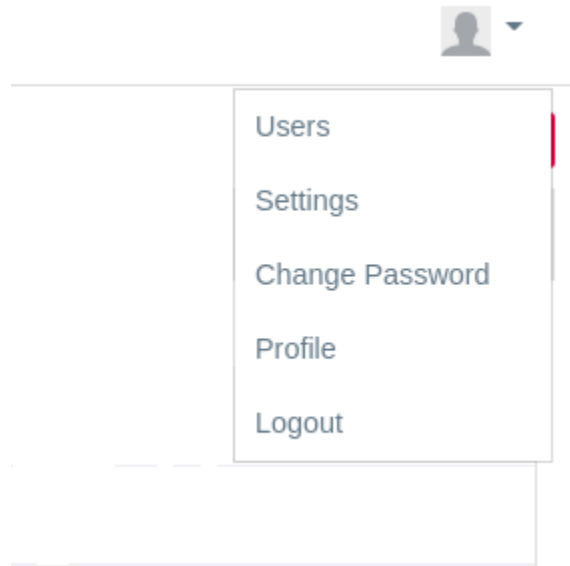


Fig Dropdown menu

Here in this drop down all the essential options for the user profile management are available i.e.

Users

On clicking users, the following page is shown

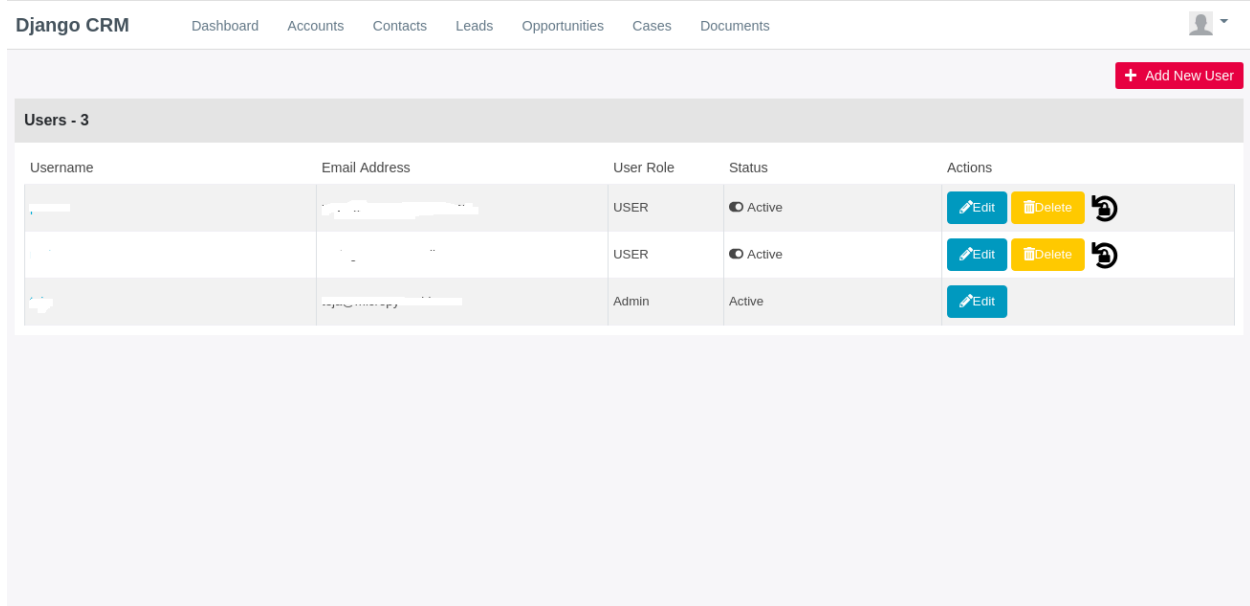


Fig: Users view

Here the user can activate/deactivate, edit/delete user data.

To create new user click on “ + Add New User“.

One clicking “ + Add New User“ the following page is shown:

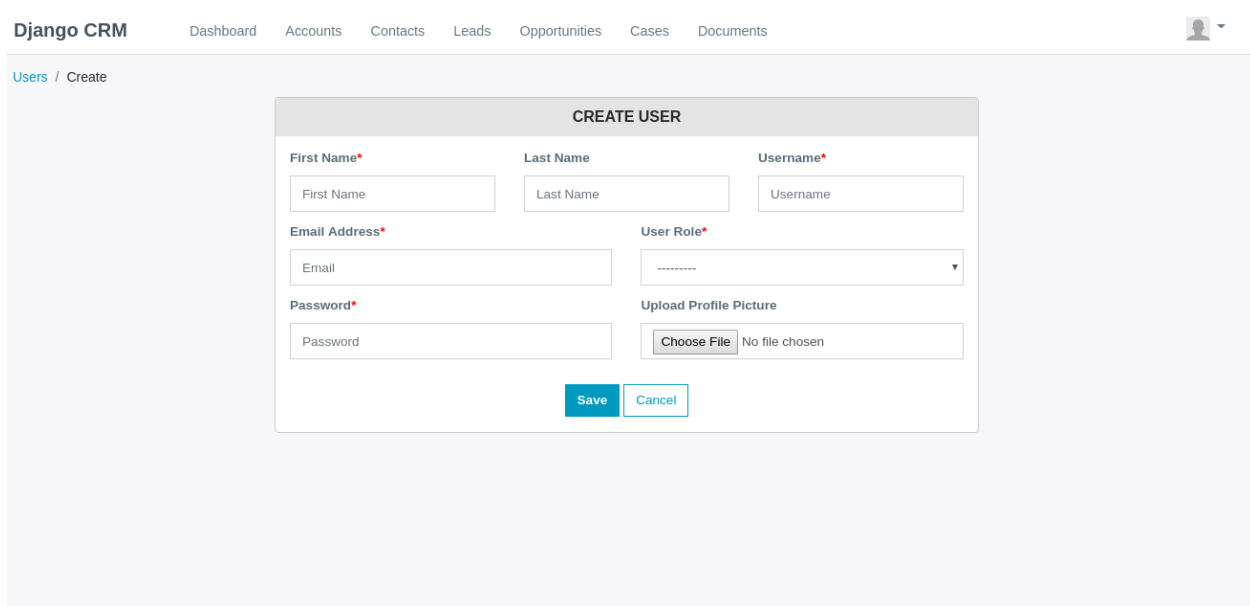


Fig User create page

Note: Fields having * are mandatory.

Django CRM Dashboard Accounts Contacts Leads Opportunities Cases Documents

Users / Edit

EDIT USER

First Name* Last Name Username*

User Role* Upload Profile Picture

USER Choose File No file chosen

Quotefancy-4675141-3840x2160.jpg

Save Cancel

Fig: User Edit User page

Settings

On clicking settings, the following page is shown:

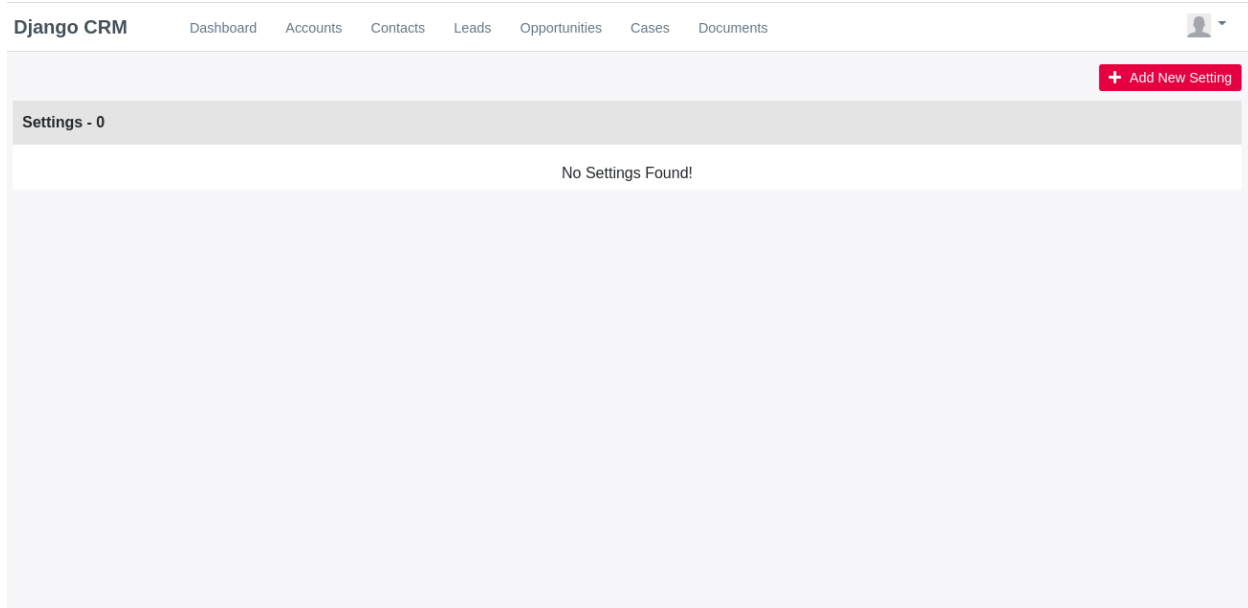


Fig: User Settings page

Click on “+ Add New Setting”

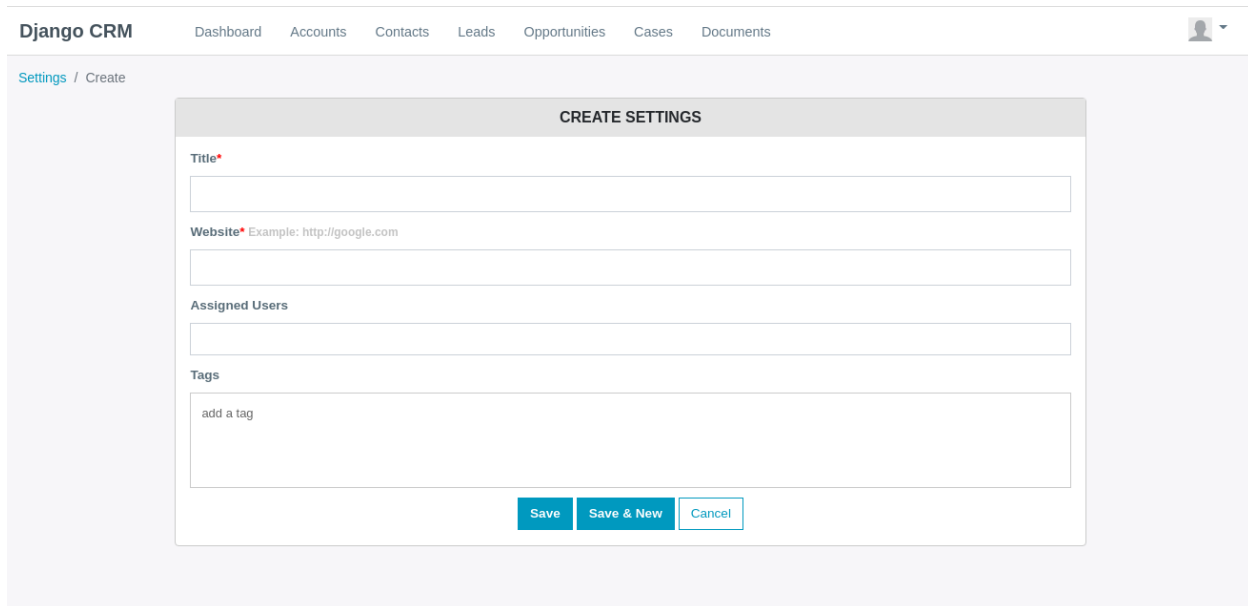
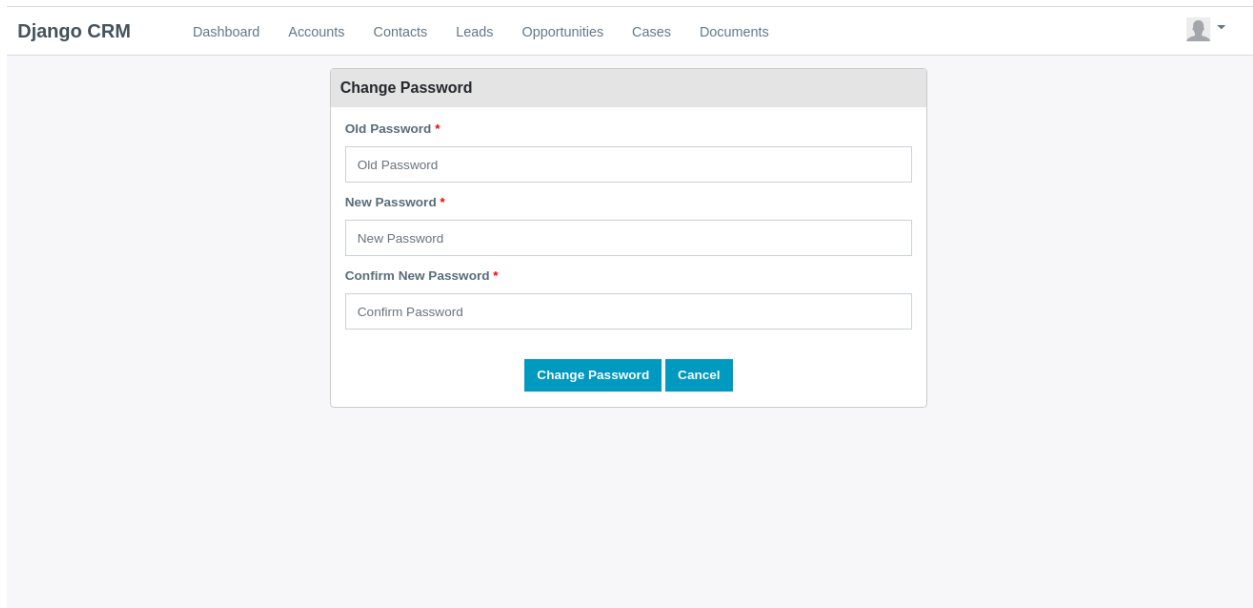


Fig: User Create Setting page

Change Password

On clicking settings, the following page is shown:

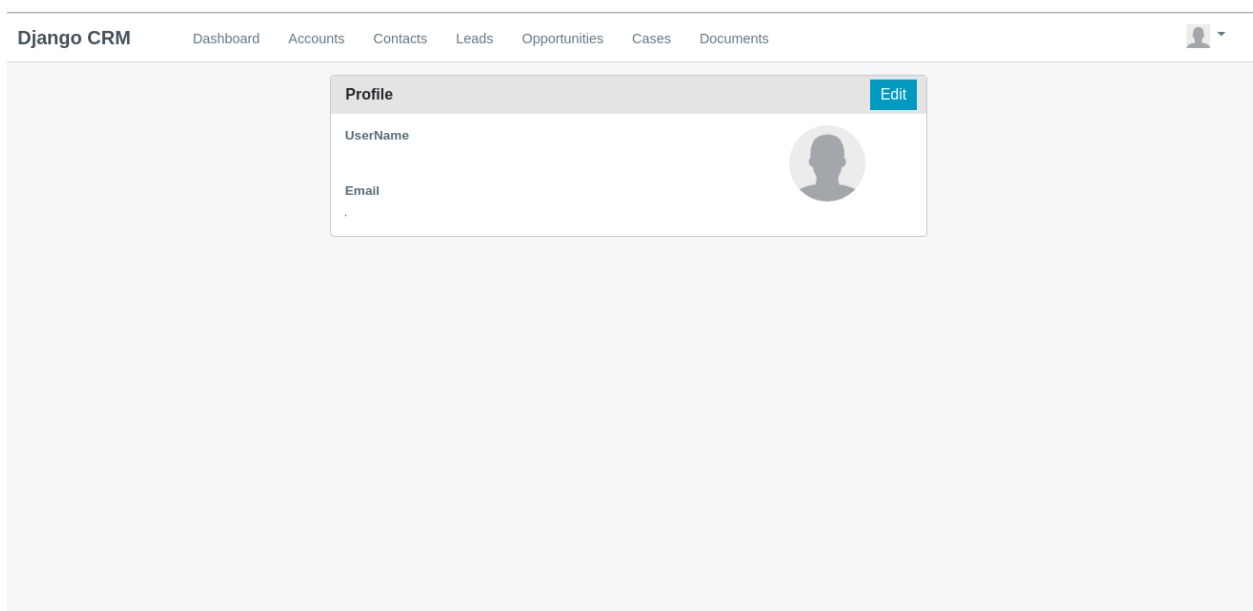


The screenshot shows the Django CRM interface with a navigation bar at the top containing 'Django CRM', 'Dashboard', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Cases', and 'Documents'. A user profile icon is in the top right. The main content area features a 'Change Password' modal form. The form has three input fields: 'Old Password', 'New Password', and 'Confirm New Password', each with a red asterisk indicating a required field. Below the fields are two buttons: 'Change Password' (in blue) and 'Cancel' (in grey).

Fig: User Change password page

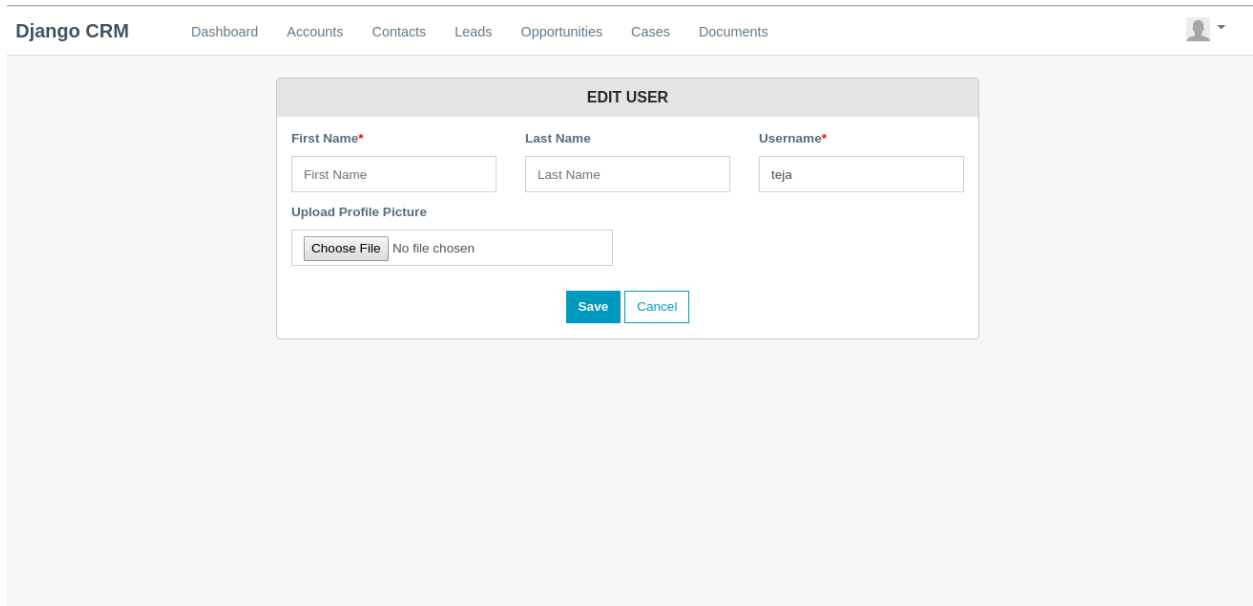
Profile

On clicking settings, the following page is shown:



The screenshot shows the Django CRM interface with the same navigation bar. The main content area features a 'Profile' modal form. The form has two input fields: 'UserName' and 'Email'. To the right of the 'Email' field is a circular profile picture placeholder. In the top right corner of the modal, there is an 'Edit' button in blue.

Fig: User profile page



The screenshot shows the 'EDIT USER' form in the Django CRM application. The form is titled 'EDIT USER' and contains three input fields for 'First Name*', 'Last Name', and 'Username*'. The 'Username*' field contains the value 'teja'. Below these fields is a section for 'Upload Profile Picture' with a 'Choose File' button and the text 'No file chosen'. At the bottom of the form are 'Save' and 'Cancel' buttons. The background of the page shows a navigation bar with links to Dashboard, Accounts, Contacts, Leads, Opportunities, Cases, and Documents, and a user profile icon in the top right corner.

Fig: User edit profile page

Here user can edit his personal details.

Logout

On Clicking logout you will be logged out from the account and redirected to Login page.

3.1.4 Change Password

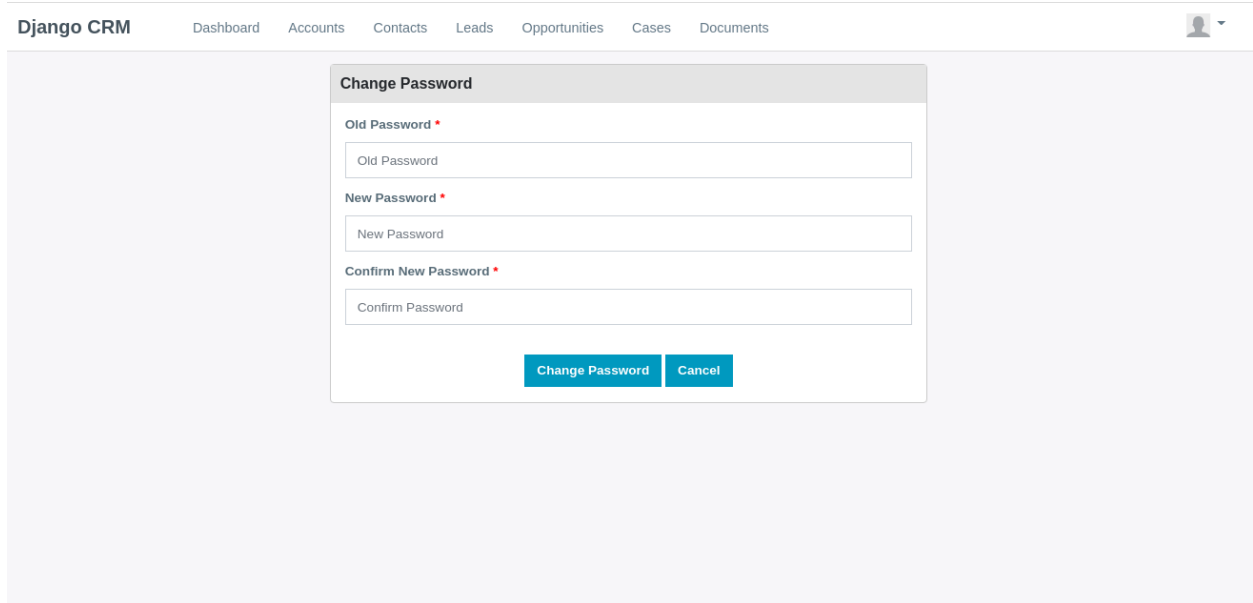
The screenshot shows the Django CRM web interface. At the top, there is a navigation bar with the logo 'Django CRM' and several menu items: 'Dashboard', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Cases', and 'Documents'. On the far right of the navigation bar is a user profile icon. The main content area is a light gray rectangle. Centered within this area is a white modal box titled 'Change Password'. Inside the modal, there are three text input fields, each with a red asterisk indicating a required field. The first field is labeled 'Old Password', the second 'New Password', and the third 'Confirm New Password'. Below these fields are two buttons: a blue 'Change Password' button and a gray 'Cancel' button.

Fig Password Change Page

The above figure shows the password change view, here enter the old password in “old password field” and enter new password in “new password field” and retype the new password in “confirm new password” field.

Click “Change Password” button to change the password successfully, otherwise cancel to cancel the process.

3.2 Modules in crm:

3.2.1 Accounts

These have the user roles i.e Admin and User. User Role will have permissions where Admin can access.

Create your Accounts - new account can be created for different users and contacts and leads can create in accounts itself in their view pages

Django CRM

[Dashboard](#)[Accounts](#)[Contacts](#)[Leads](#)[Opportunities](#)[Cases](#)[Documents](#)



+ Add New Account

Filters

Name

Account Name

City

City

Tags

--Select Tags--

Search

Clear

Active (2)

Closed (0)

Open Accounts - 2



ID	Name	Created By	City	State	Tags	Actions
1					pdS tus	 
2					No Tags	 

Fig Accounts page

This page view describes us about the accounts available and basic information.

There are 2 types of accounts i.e Open/Closed accounts.

We can Edit/Delete accounts here

To create an account we have a option “Add New Account” at the top right corner On Clicking it you will be redirected to the below page.

Optional: We can filter the users based on name,city,tags .

Django CRM Dashboard Accounts Contacts Leads Opportunities Cases Documents 

[Accounts](#) / Create

CREATE ACCOUNT

Name*

Billing Address *

Status

Website

Street *

PostCode *

Tags

Phone*

City *

State *

Attachment

 No file chosen

Email Address*

Country *

Leads*

Contacts*

Fig Account create page

Here while we are creating an account, it is mandatory to have minimum one contact and one lead.

Note: Fields having * are mandatory

3.2.2 Contacts

Contacts can be created and can be assigned to Accounts

Django CRM Dashboard Accounts Contacts Leads Opportunities Cases Documents 

[+ Add New Contact](#)

Filters

NAME

CITY

Assigned Users

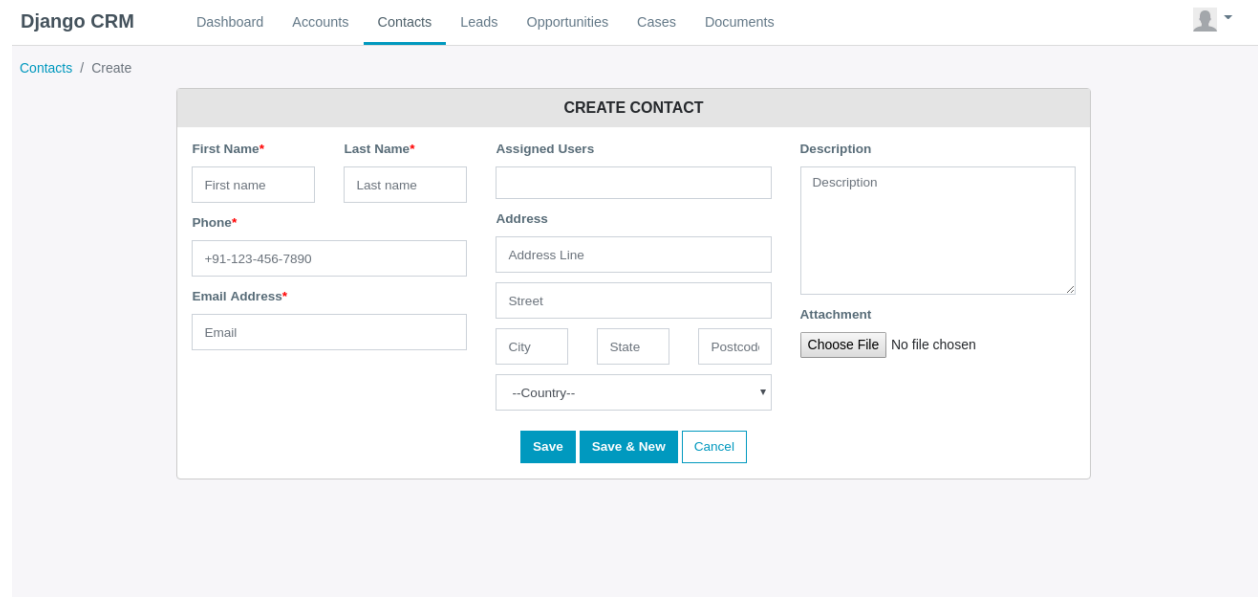
Contacts - 2 

S.no	Name	Assigned User	City	State	Actions
1					Edit Delete
2					Edit Delete

Fig Contacts Home Page

The above figure shows the contacts view, this page gives details and list view of leads
You can filter the results by name, city, assigned user.

Create a new Lead using the button on right corner + Add New contact



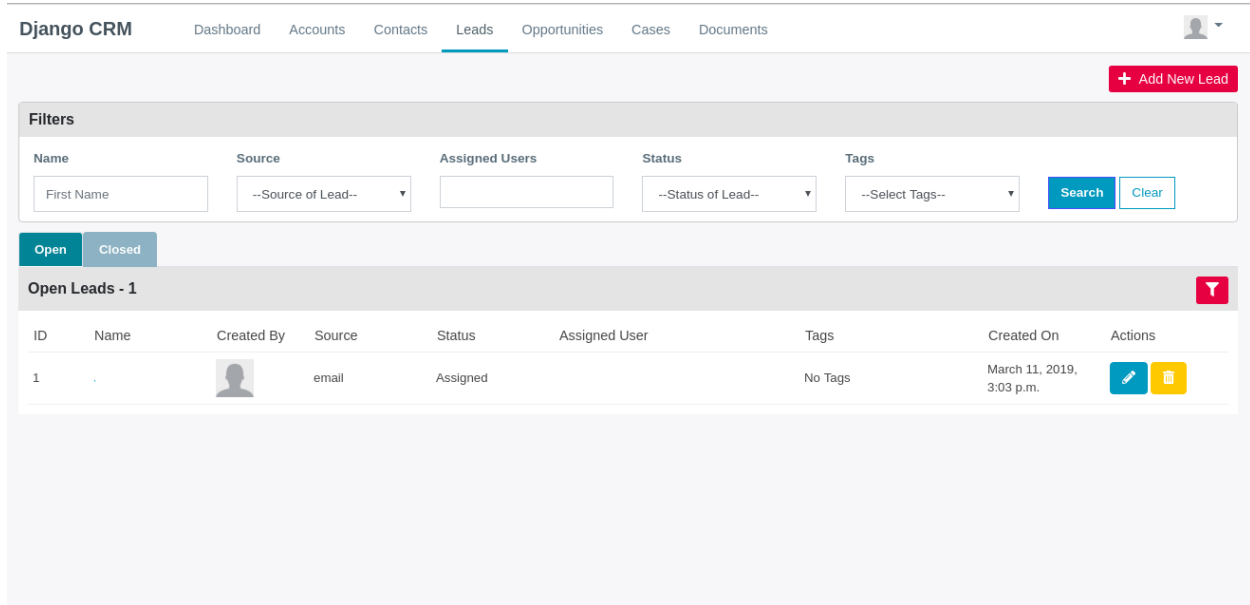
The screenshot displays the 'CREATE CONTACT' form within the Django CRM application. The interface includes a top navigation bar with the 'Django CRM' logo and links to Dashboard, Accounts, Contacts (active), Leads, Opportunities, Cases, and Documents. A user profile icon is visible in the top right corner. Below the navigation bar, a breadcrumb trail shows 'Contacts / Create'. The main form area is titled 'CREATE CONTACT' and contains several input fields: 'First Name*' (with placeholder 'First name'), 'Last Name*' (with placeholder 'Last name'), 'Assigned Users' (a dropdown menu), 'Description' (a text area with placeholder 'Description'), 'Phone*' (with placeholder '+91-123-456-7890'), 'Address' (a text area with placeholder 'Address Line'), 'Email Address*' (with placeholder 'Email'), 'City', 'State', 'Postcode', and a '--Country--' dropdown menu. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. An 'Attachment' section is also present, featuring a 'Choose File' button and the text 'No file chosen'.

Fig Contacts Create Page

Note: Fields having * are mandatory.

Note: To create a contacts lead is required.

3.2.3 Leads



Django CRM Dashboard Accounts Contacts **Leads** Opportunities Cases Documents

+ Add New Lead

Filters

Name Source Assigned Users Status Tags

First Name --Source of Lead-- --Status of Lead-- --Select Tags-- Search Clear

Open Closed

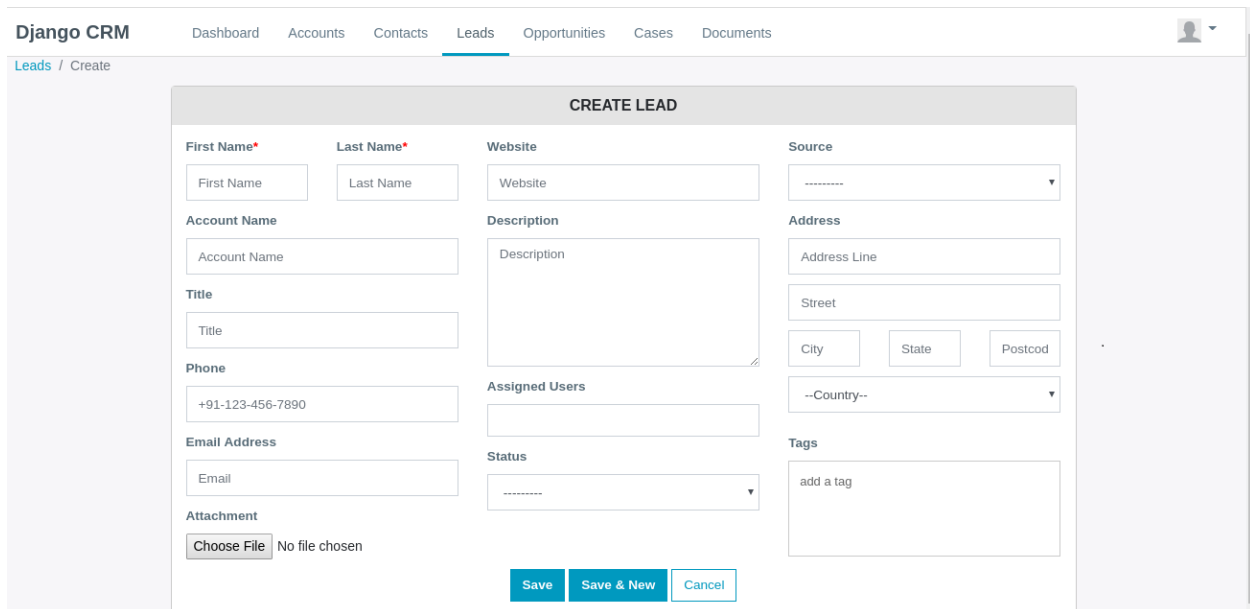
Open Leads - 1

ID	Name	Created By	Source	Status	Assigned User	Tags	Created On	Actions
1			email	Assigned		No Tags	March 11, 2019, 3:03 p.m.	

Fig Accounts Home Page

The above figure shows the leads view, this page gives details and list view of leads
You can filter the results by name, source, assigned user, status, tags

Create a new Lead using the button on right corner + Add New Lead



Django CRM Dashboard Accounts Contacts **Leads** Opportunities Cases Documents

Leads / Create

CREATE LEAD

First Name* Last Name* Website Source

First Name Last Name Website -----

Account Name Description Address

Account Name Description Address Line

Title

Title Street

Phone

+91-123-456-7890

Assigned Users

City State Postcod

Email Address

Email

--Country--

Attachment

Choose File No file chosen

Status

Tags

add a tag

Save Save & New Cancel

Fig Leads Create Page

Note: Fields having * are mandatory

3.2.4 Opportunity

New Opportunities can be added and can be assigned to accounts and contacts.

Django CRM Dashboard Accounts Contacts Leads Opportunities Cases Documents

+ Add New Opportunity

Filters

Name Account Stage Lead Source

Name -----

Search Clear

Opportunities - 0

No Opportunity Records Found

Fig Opportunity Home Page

The above figure shows the Opportunity view, this page gives details and list view of leads

They are two types of leads open and closed

You can filter the results by name, stage, account, lead source

Create a new Lead using the button on right corner + Add New Opportunity

Django CRM Dashboard Accounts Contacts Leads **Opportunities** Cases Documents

Opportunities / Create

CREATE OPPORTUNITY

Name*

Account

Amount

Currency

Stage*

Lead Source

Probability %

Assigned Users

Contacts

Due Date

Tags

Description

Attachment

 No file chosen

Fig Opportunity Create Page

Note: Fields having * are mandatory.

Note: To create a Opportunity lead is required.

3.2.5 Cases

Django CRM Dashboard Accounts Contacts Leads Opportunities **Cases** Documents

+ Add New Case

Filters

Name **Status** **Priority** **Account**

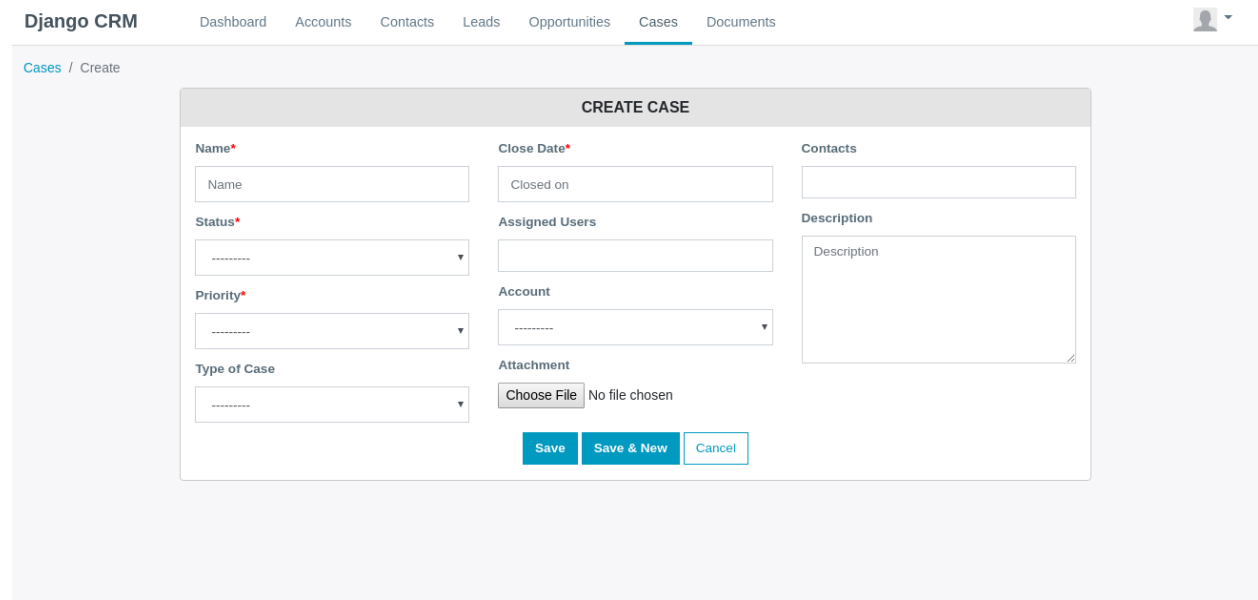
Cases - 0

No Cases Records Found

Fig cases Home Page

The above figure shows the cases view, this page gives details and list view of leads
You can filter the results by name, status, priority, account.

Create a new Lead using the button on right corner + Add New case



The screenshot displays the 'CREATE CASE' form within the Django CRM application. The top navigation bar includes 'Dashboard', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Cases' (highlighted), and 'Documents'. A user profile icon is visible on the right. Below the navigation bar, the breadcrumb 'Cases / Create' is shown. The form itself is titled 'CREATE CASE' and contains several fields: 'Name*' (text input), 'Close Date*' (text input), 'Contacts' (text input), 'Status*' (dropdown menu), 'Assigned Users' (text input), 'Description' (text area), 'Priority*' (dropdown menu), 'Account' (dropdown menu), and 'Type of Case' (dropdown menu). An 'Attachment' section includes a 'Choose File' button and the text 'No file chosen'. At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

Fig cases Create Page

Note: Fields having * are mandatory.

Note: To create a cases user, accounts are required.

3.2.6 Documents

The screenshot shows the 'Documents' page in Django CRM. At the top, there's a navigation bar with 'Django CRM' and links to Dashboard, Accounts, Contacts, Leads, Opportunities, Cases, and Documents. A user profile icon is in the top right. Below the navigation bar, there's a red button '+ Add New Document'. A 'Filters' section contains three input fields: 'Title' (with 'Document Title' entered), 'Status' (with '--Status--' selected), and 'Shared To'. There are 'Search' and 'Clear' buttons. Below the filters, a table titled 'Documents - 1' shows a single document. The table has columns: S.No, Title, Created By, Created On, Status, Shared To, and Actions. The first row shows '1' in S.No, a document icon in Title, a user icon in Created By, 'March 13, 2019, 2:39 p.m.' in Created On, 'active' in Status, and three action buttons (edit, delete, download) in Actions.

S.No	Title	Created By	Created On	Status	Shared To	Actions
1			March 13, 2019, 2:39 p.m.	active		

Fig documents Home Page

The above figure shows the documents view, this page gives details and list view of leads. You can filter the results by title, status, shared to.

Create a new Document using the button on right corner + Add New Document

The screenshot shows the 'Documents / Create' page in Django CRM. It features a 'CREATE DOCUMENT' form with three main sections: 'Title' with a text input field containing 'Document title'; 'Upload Document' with a 'Choose File' button and the text 'No file chosen'; and 'Share To' with a text input field. At the bottom of the form are 'Save' and 'Cancel' buttons.

Fig Documents Create Page

Note: Fields having * are mandatory.

CHAPTER 4

Rules to follow:-

1. writing test cases for the code
2. test cases coverage percent should be above 90%

Setup On Local System

5.1 On Windows

5.2 On Ubuntu

First Create a Virtual Environment in a local directory.

Install Pip to install python packages.

Then clone the source code from the repository [click here](#).

Activate Virtual environment, then install the requirements.txt using the command

```
pip install -r requirements.txt
```

Then execute

```
python manage.py runserver
```

Now Go to browser, enter the url `http://127.0.0.1:8000`

Installation - Requirements

6.1 Ubuntu 64bit - 16.04

```
$ sudo apt-get update && apt-get upgrade -y
$ sudo apt-get install -y curl wget libpq-dev python3-dev gem ruby ruby-dev build-essential libssl-dev libffi-dev
python-dev python-virtualenv python-pip git redis-server libtiff5-dev libjpeg8-dev zlib1g-dev libfreetype6-dev
liblcms2-dev libwebp-dev libharfbuzz-dev libfribidi-dev tcl8.6-dev tk8.6-dev python-tk
$ sudo gem install sass
```

Visit our Django web development page [Here](<https://micropyramid.com/django-ecommerce-development/>)

We welcome your feedback and support, raise github ticket if you want to report a bug or need new feature.

Need additional support? [Contact us here](#)

or

mailto:: "hello@micropyramid.com"