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# Django-CRM Documentation

*Release 0.4.0*

**Django-CRM**

**Sep 12, 2019**



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# CHAPTER 1

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## Introduction:

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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

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Tech stack used:

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- Python  $\geq 3.4$
- Django  $\geq 2.0$
- Redis
- django-simple-pagination





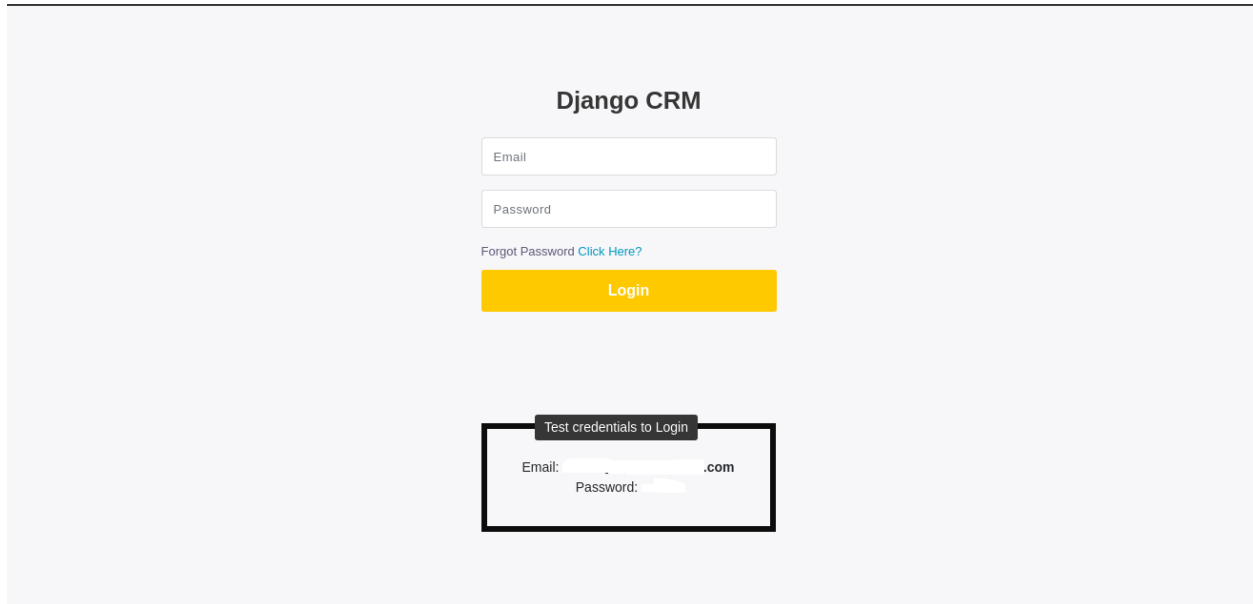
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Modules available in Django-CRM:

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### 3.1 User functionalites:

#### 3.1.1 Login

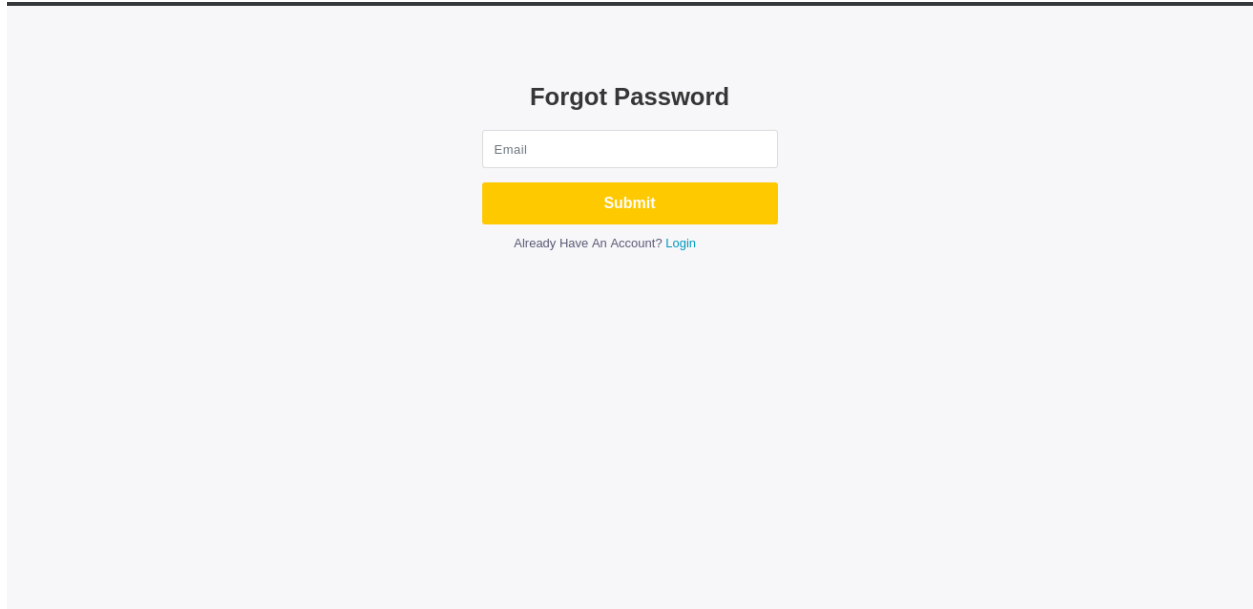


The screenshot displays the login interface for Django CRM. At the top, the title "Django CRM" is centered. Below it are two input fields: "Email" and "Password". A link "Forgot Password Click Here?" is positioned below the password field. A prominent yellow "Login" button is centered below the links. 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

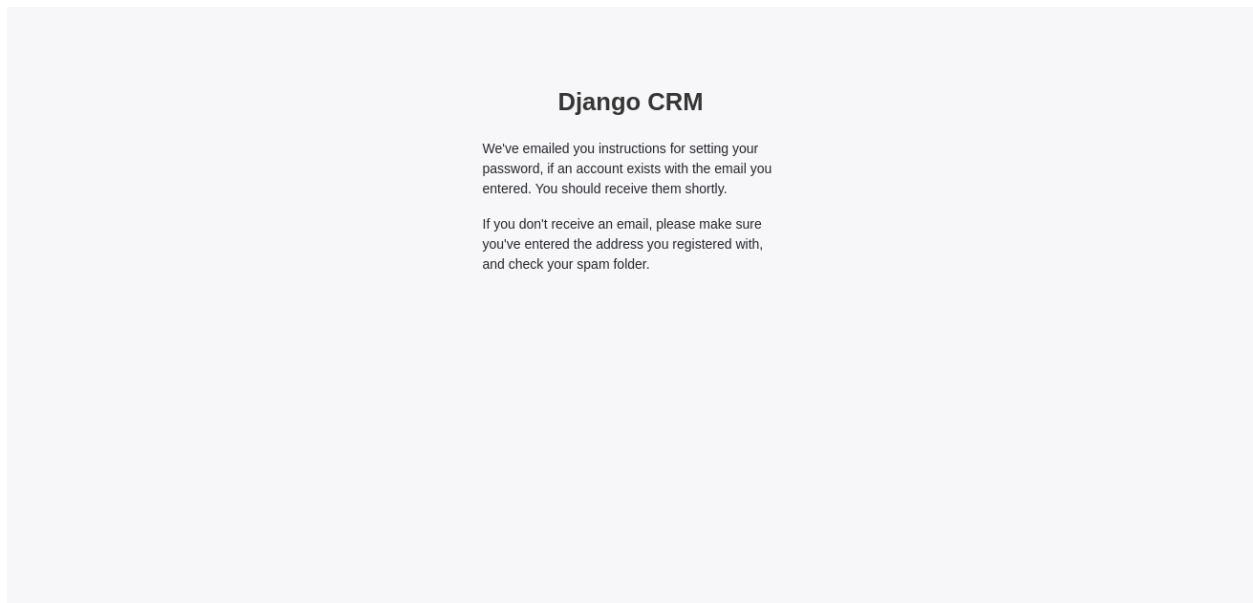
### 3.1.2 Forget Password

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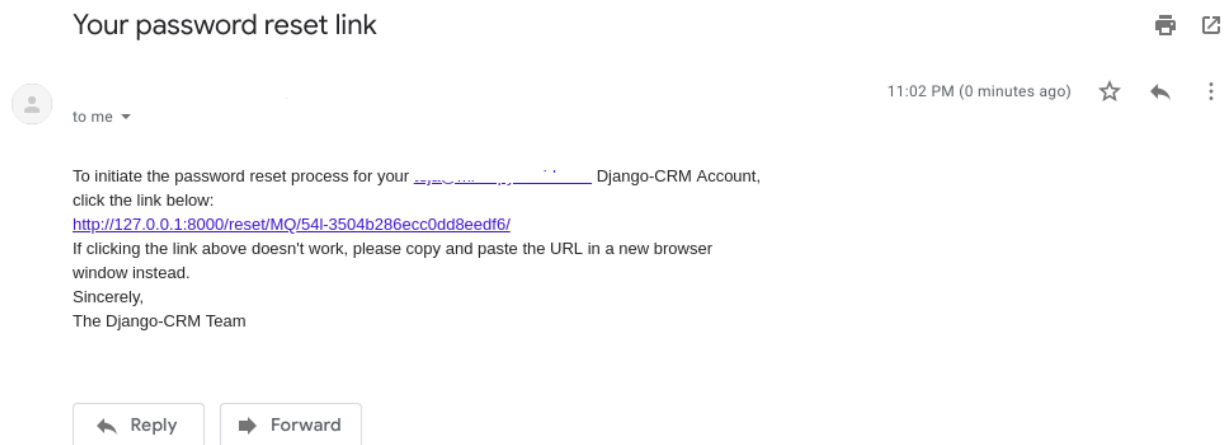
**Fig** Forget Password Page View

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.



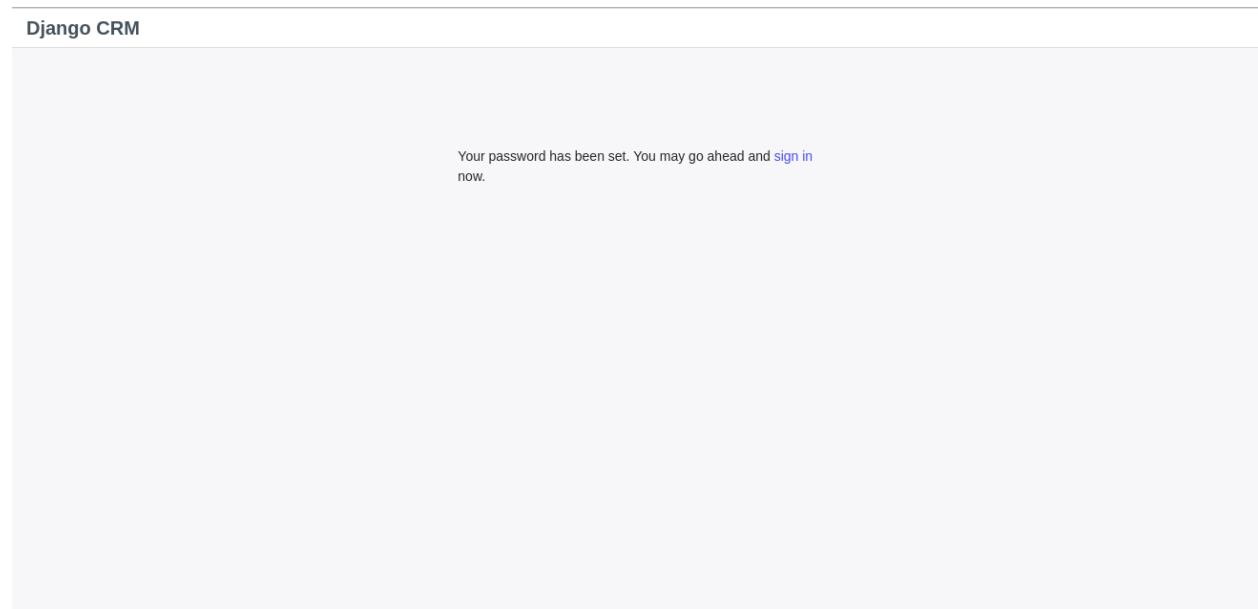
**Fig** Email recieved

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" in the header. 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

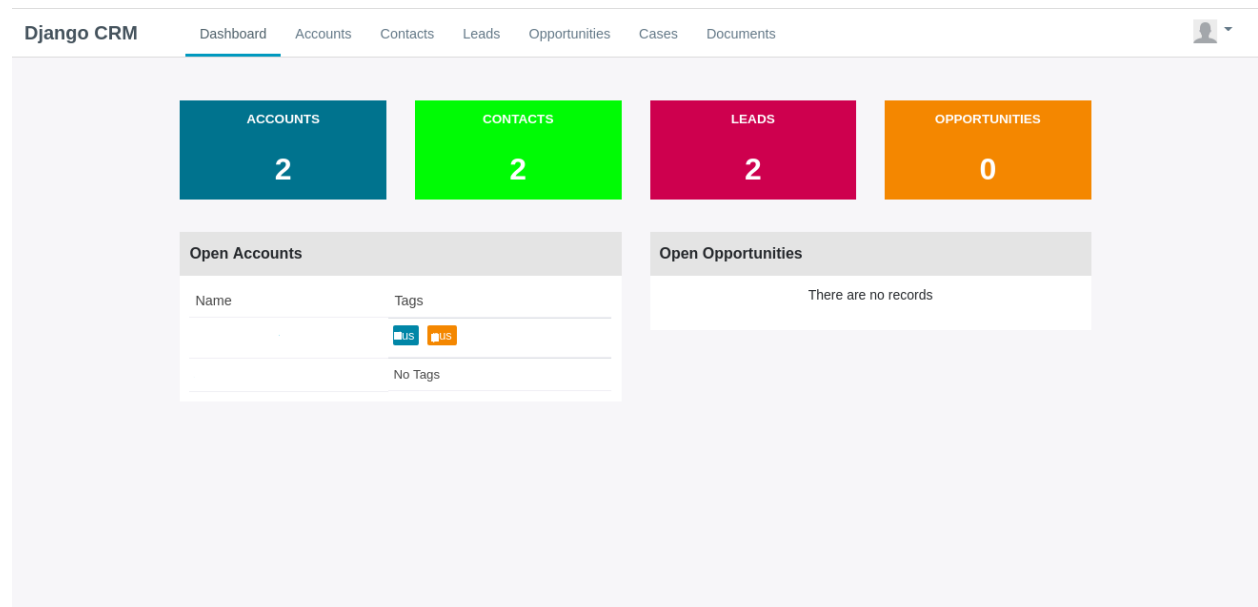
After you successful change the password you will get below page



**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



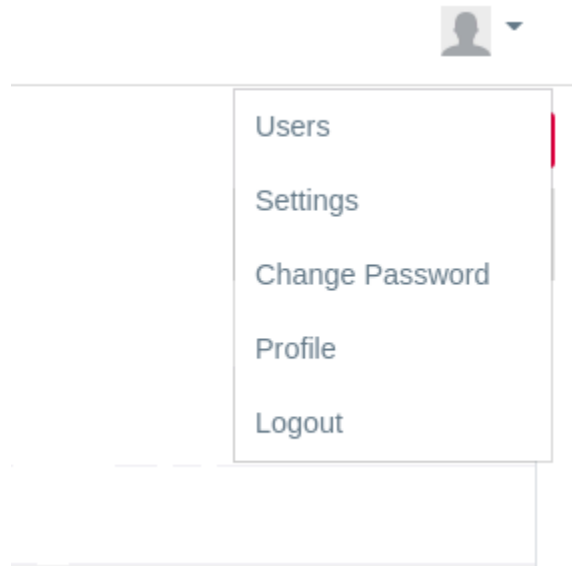
**Fig** Dashboard view

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

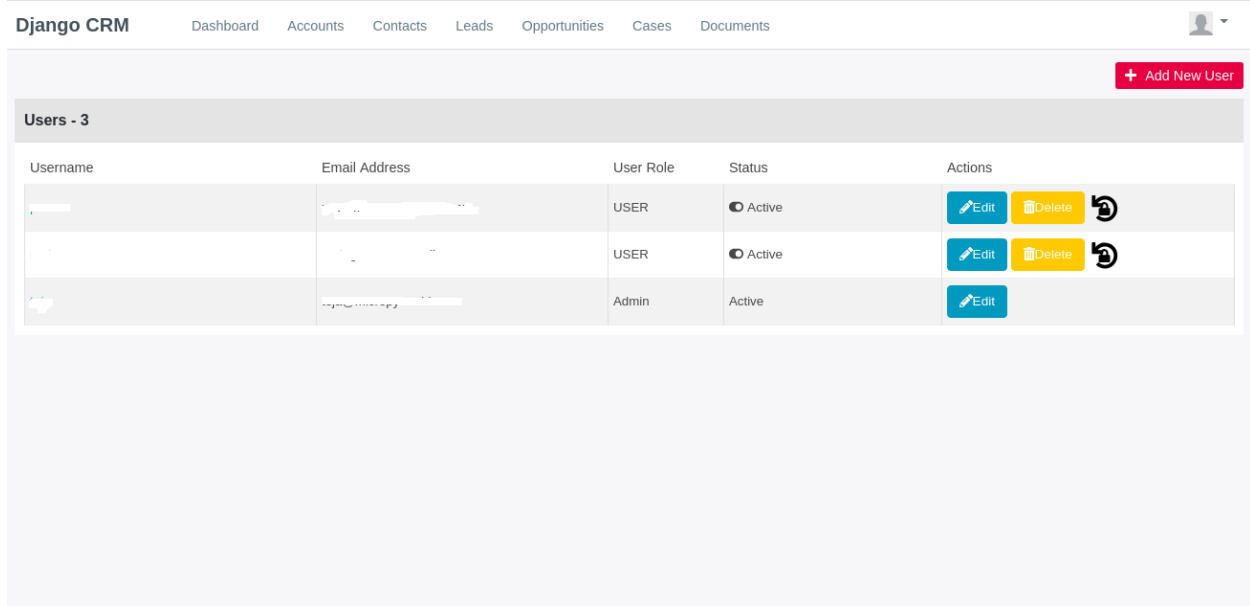




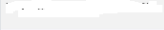








**Fig** Dropdown menu

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



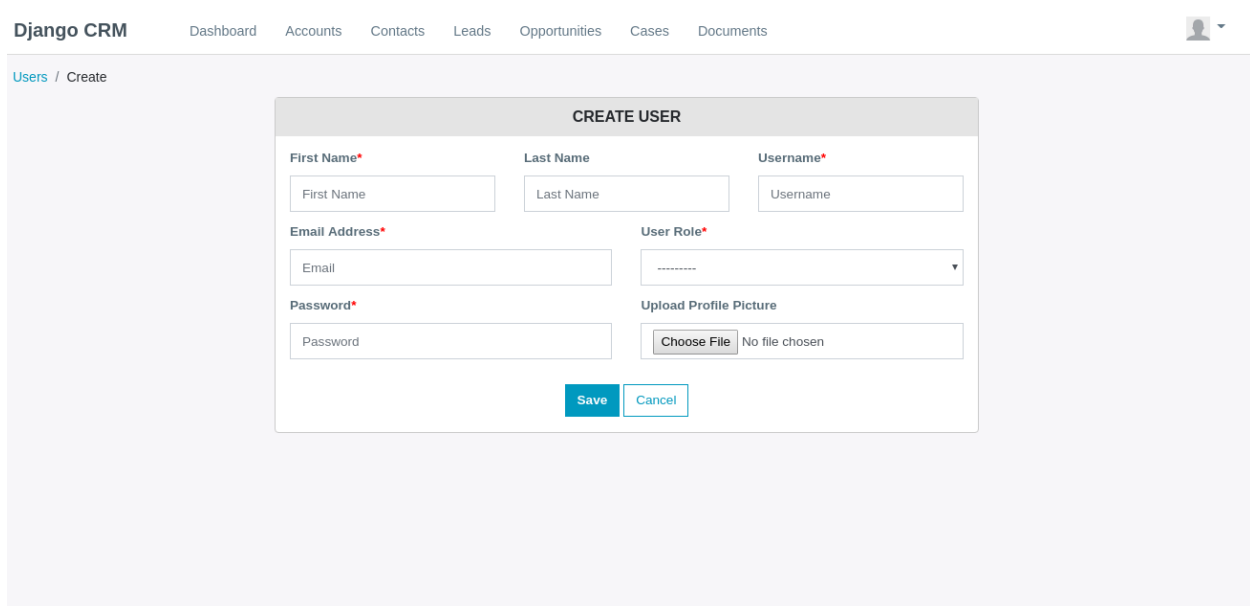
Django CRM					Dashboard	Accounts	Contacts	Leads	Opportunities	Cases	Documents	
					<a href="#">+ Add New User</a>							
Users - 3												
Username	Email Address	User Role	Status	Actions								
		USER	 Active	<a href="#">Edit</a> <a href="#">Delete</a> 								
		USER	 Active	<a href="#">Edit</a> <a href="#">Delete</a> 								
		Admin	Active	<a href="#">Edit</a>								

**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:



Django CRM

Dashboard Accounts Contacts Leads Opportunities Cases Documents

Users / Create

CREATE USER

First Name\*

Last Name

Username\*

Email Address\*

User Role\*

Password\*

Upload Profile Picture

Choose File

No file chosen

Save

Cancel

**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

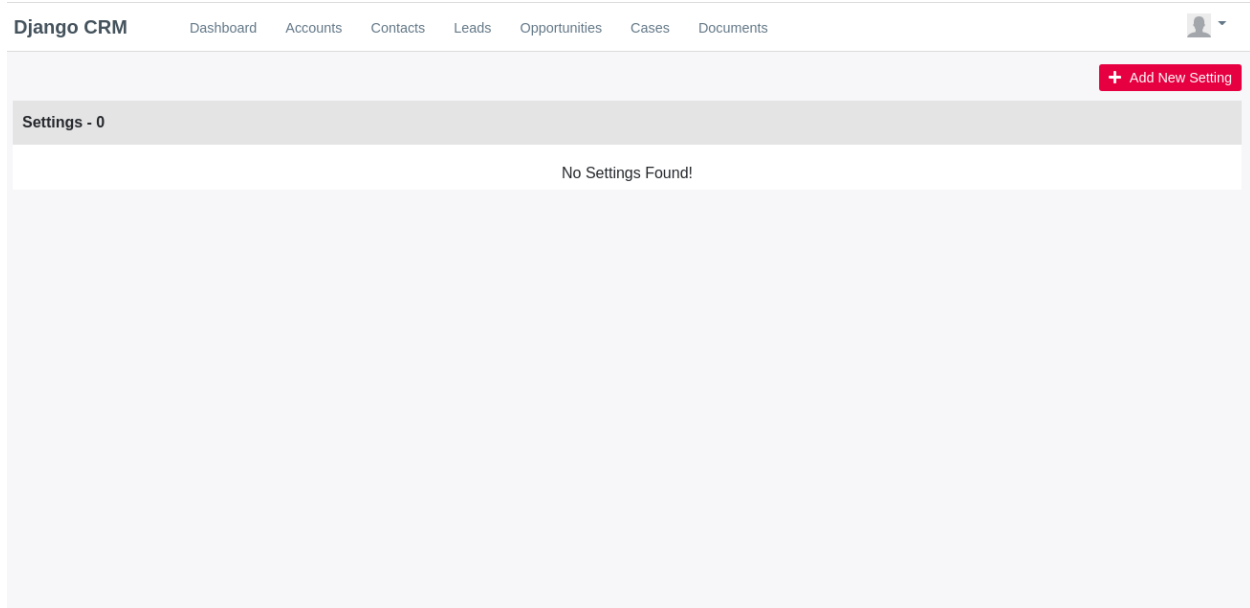
Quotefancy-4675141-3840x2160.jpg

Save Cancel

**Fig:** User Edit User page

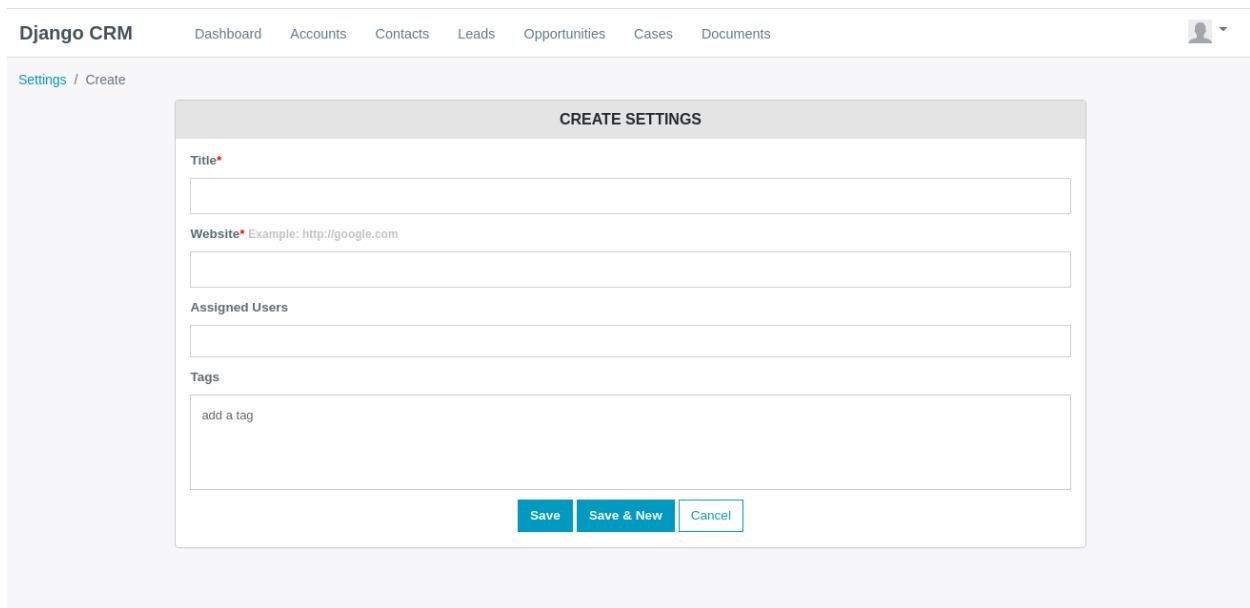
## Settings

On clicking settings, the following page is shown:



**Fig:** User Settings page

Click on “+ Add New Setting”

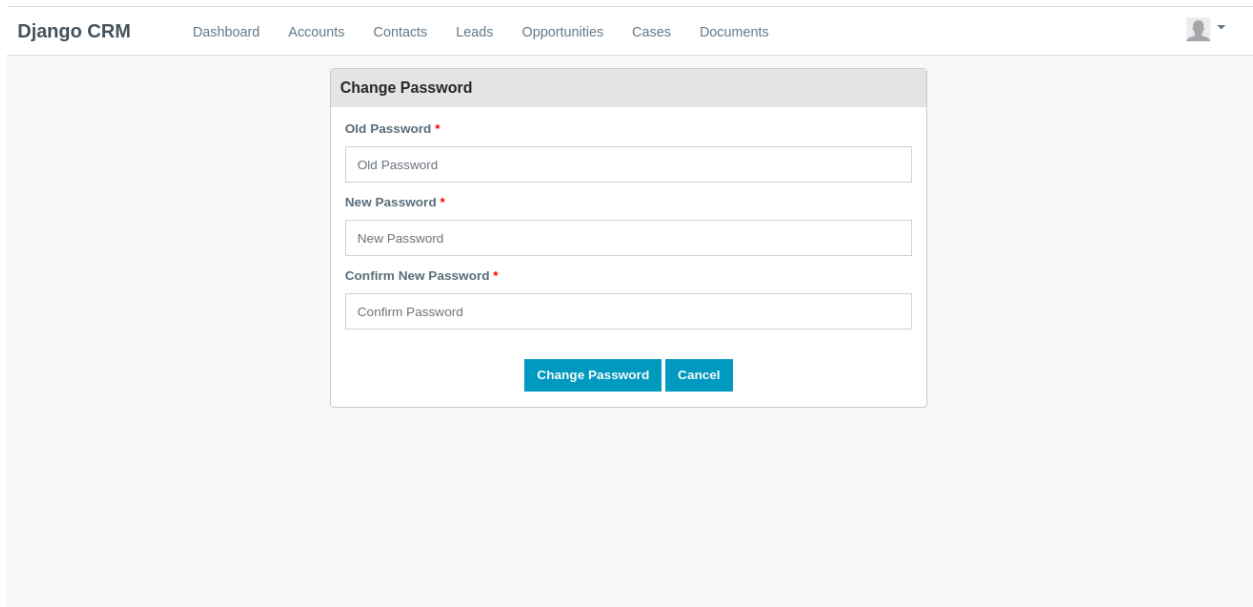


**Fig:** User Create Setting page



## Change Password

On clicking settings, the following page is shown:

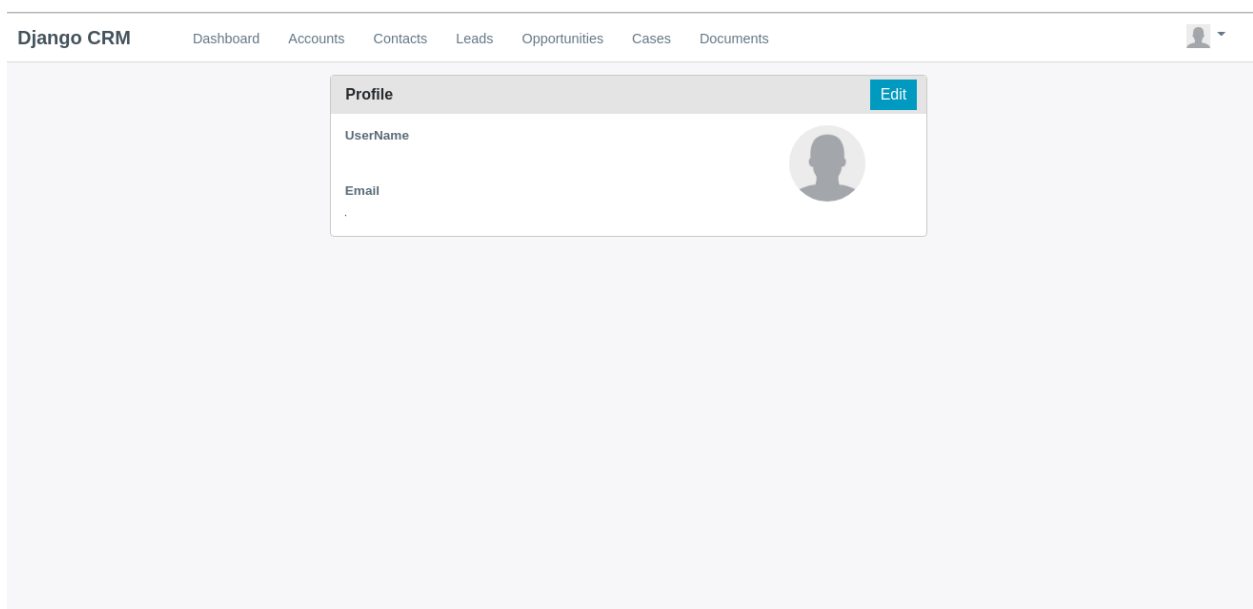


The screenshot shows the Django CRM interface with a navigation bar at the top containing 'Django CRM', 'Dashboard', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Cases', and 'Documents'. A user profile icon is in the top right. The main content area features a 'Change Password' modal form. The 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' and 'Cancel'.

**Fig:** User Change password page

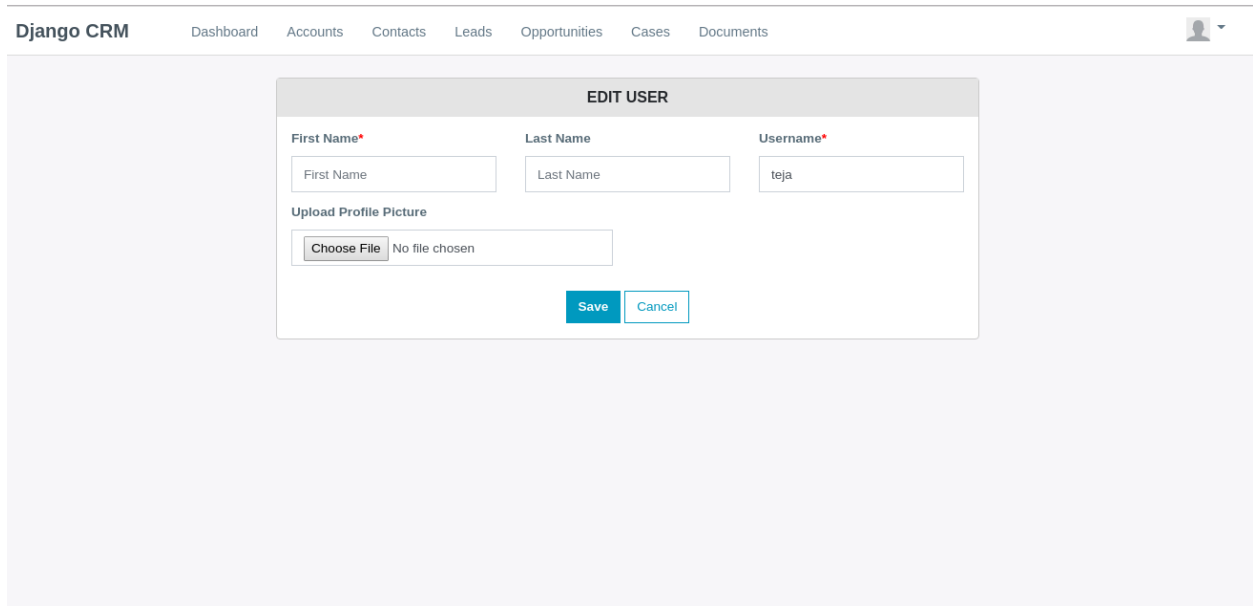
## Profile

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. An 'Edit' button is located in the top right corner of the modal form.

**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: Dashboard, Accounts, Contacts, Leads, Opportunities, Cases, and Documents, along with a user profile icon in the top right corner.

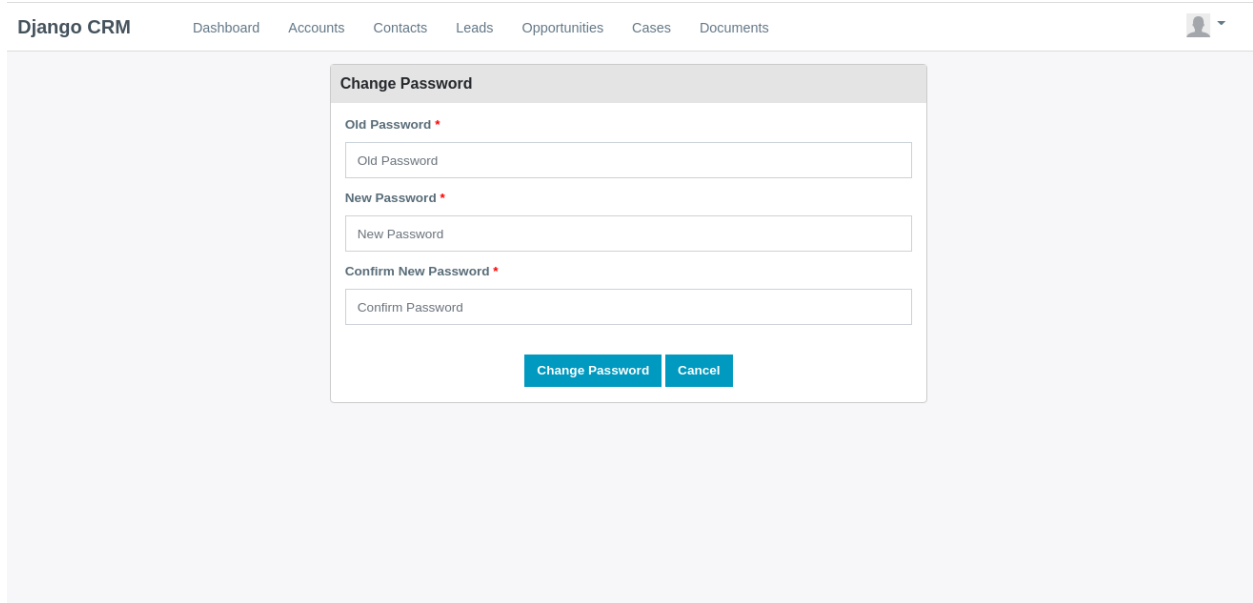
**Fig:** User edit profile page

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 text "Django CRM" on the left and a series of links: "Dashboard", "Accounts", "Contacts", "Leads", "Opportunities", "Cases", and "Documents". On the right side of the navigation bar is a user profile icon with a dropdown arrow. Below the navigation bar, the main content area is a light gray. In the center of this area is a white modal box titled "Change Password". Inside the modal, there are three text input fields. The first is labeled "Old Password" with a red asterisk to its left. The second is labeled "New Password" with a red asterisk to its left. The third is labeled "Confirm New Password" with a red asterisk to its left. 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

City

Tags

Account Name

City

--Select Tags--

Search

Clear

Active (2)

Closed (0)

Open Accounts - 2

ID	Name	Created By	City	State	Tags	Actions
1					<div>pdS</div> <div>tus</div>	<div></div> <div></div>
2					No Tags	<div></div> <div></div>

**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**

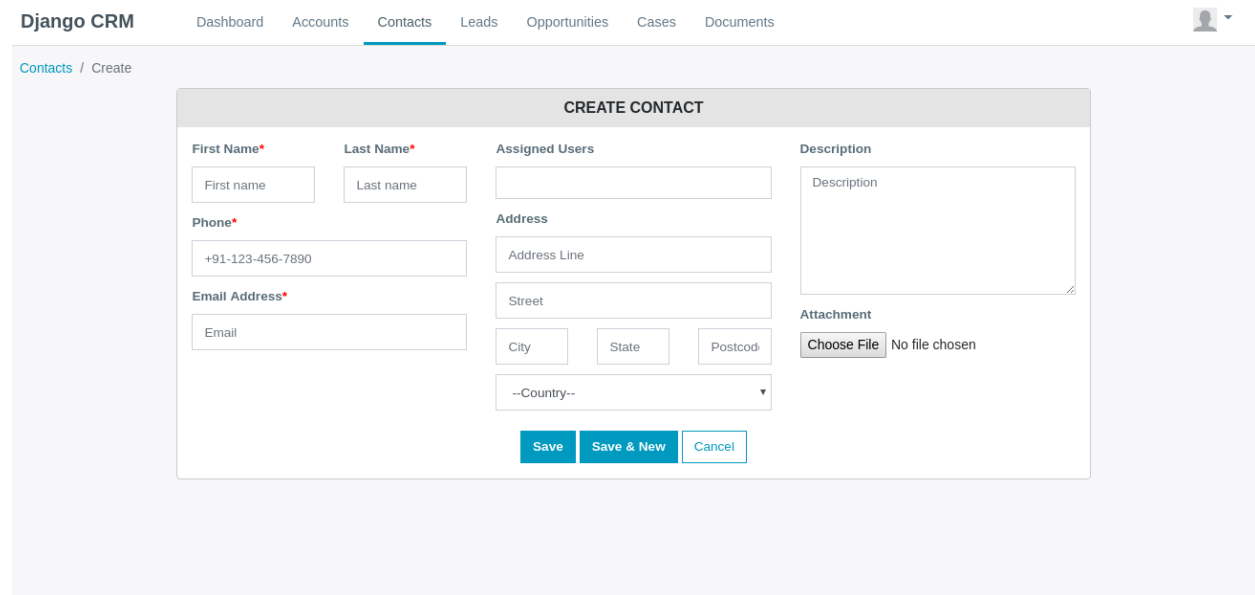
**Contacts - 2** 

S.no	Name	Assigned User	City	State	Actions
1					<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2					<input type="button" value="Edit"/> <input type="button" value="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



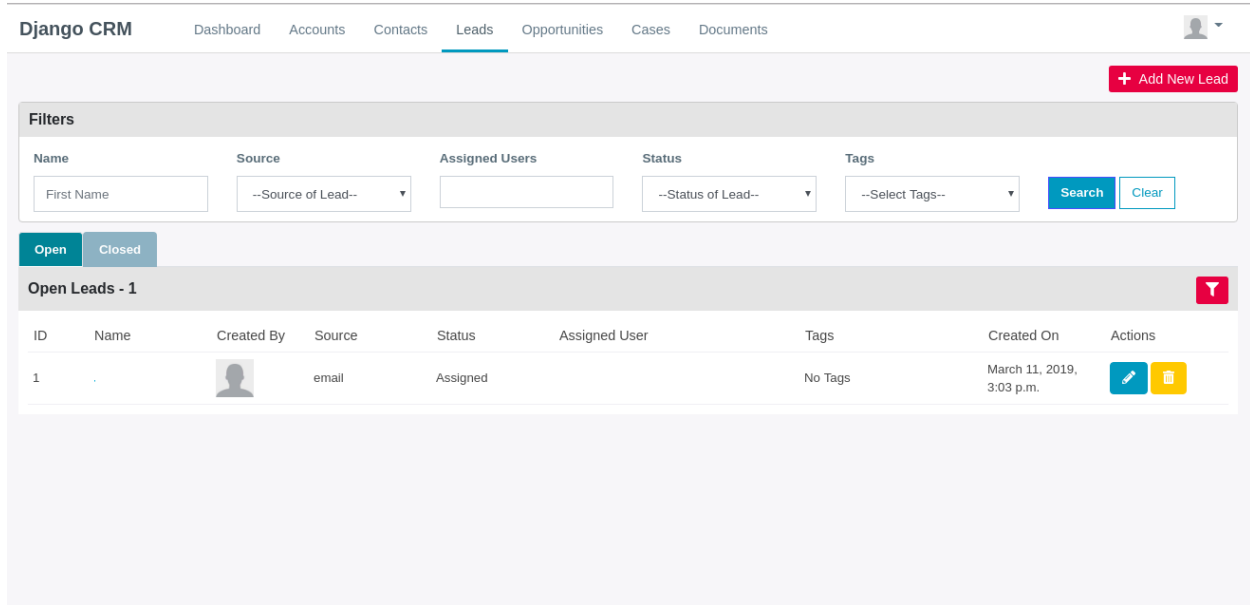
The screenshot displays the 'Django CRM' application interface. At the top, a navigation bar includes links for 'Dashboard', 'Accounts', 'Contacts' (which is highlighted), 'Leads', 'Opportunities', 'Cases', and 'Documents'. A user profile icon is visible on the right. Below the navigation bar, a breadcrumb trail shows 'Contacts / Create'. The main content area features a 'CREATE CONTACT' form. This form is organized into several sections: 'First Name\*' and 'Last Name\*' (both mandatory) with input fields; 'Assigned Users' with a dropdown menu; 'Description' with a large text area; 'Phone\*' with an input field containing '+91-123-456-7890'; 'Email Address\*' with an input field containing 'Email'; and 'Address' which includes 'Address Line', 'Street', 'City', 'State', 'Postcode', and a 'Country' dropdown. At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'. An 'Attachment' section at the bottom right includes 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:    [Search](#)   [Clear](#)

[Open](#)   [Closed](#)

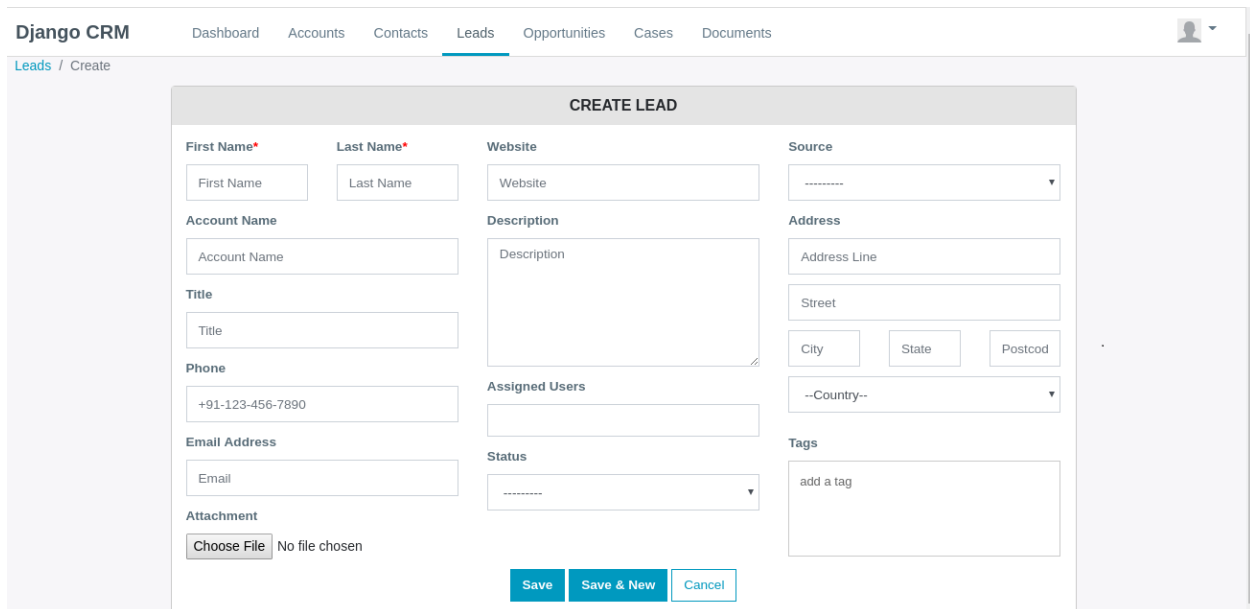
**Open Leads - 1**

ID	Name	Created By	Source	Status	Assigned User	Tags	Created On	Actions
1	.		email	Assigned		No Tags	March 11, 2019, 3:03 p.m.	<a href="#">Edit</a> <a href="#">Delete</a>

**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

Account Name    Description    Address

Title    Street

City    State    Postcod

Phone    Assigned Users

Email Address    Status

Attachment  No file chosen   Tags

[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

add a tag

Description

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


--Status-- ▾

Priority

--Priority-- ▾

Account

--Select Account-- ▾

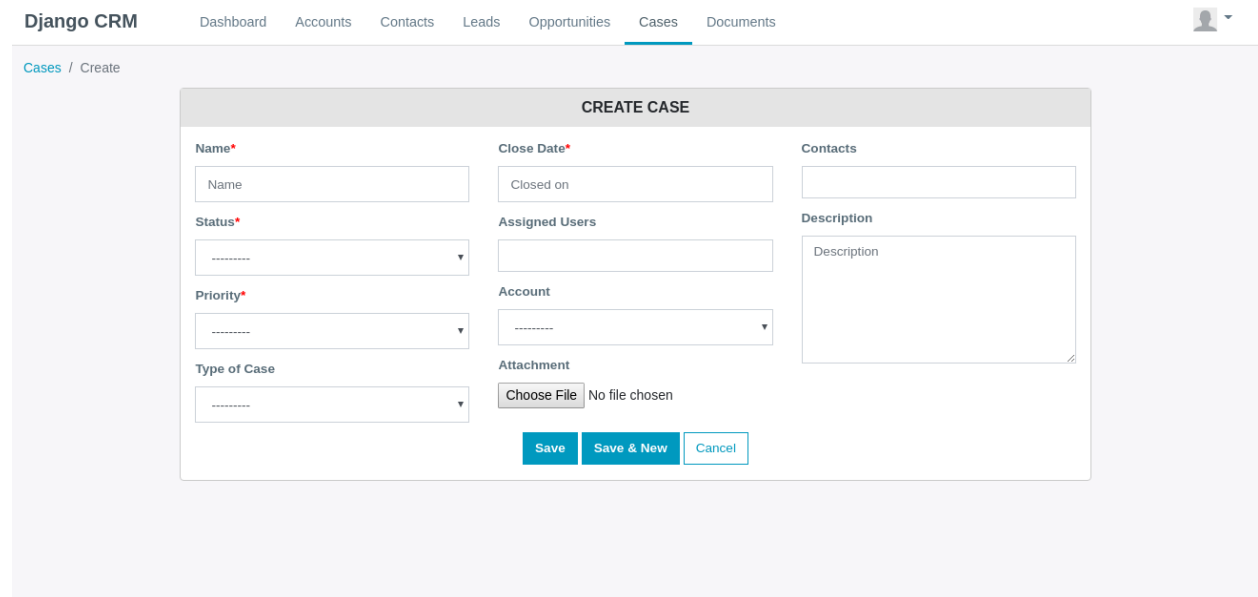
Cases - 0 

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 interface includes a top navigation bar with the following links: Dashboard, Accounts, Contacts, Leads, Opportunities, Cases (highlighted), and Documents. A user profile icon is visible in the top right corner. Below the navigation bar, the breadcrumb 'Cases / Create' is shown. The main form area is titled 'CREATE CASE' and contains several input fields and buttons:

- Name\***: A text input field with a placeholder 'Name'.
- Close Date\***: A date input field with a placeholder 'Closed on'.
- Contacts**: A text input field.
- Status\***: A dropdown menu with a placeholder '.....'.
- Assigned Users**: A text input field.
- Description**: A large text area with a placeholder 'Description'.
- Priority\***: A dropdown menu with a placeholder '.....'.
- Account**: A dropdown menu with a placeholder '.....'.
- Type of Case**: A dropdown menu with a placeholder '.....'.
- Attachment**: A section with a 'Choose File' button and the text 'No file chosen'.

At the bottom of the form, there are three buttons: 'Save' (teal), 'Save & New' (teal), and 'Cancel' (light blue).

### 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 on the 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 with the following details:

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. A modal form titled 'CREATE DOCUMENT' is displayed. It contains the following fields:

- Title \***: A text input field with 'Document title' entered.
- Upload Document \***: A file upload area with a 'Choose File' button and the text 'No file chosen'.
- Share To**: A text input field.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

**Fig** Documents Create Page

**Note:** Fields having \* are mandatory.

## CHAPTER 4

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### Rules to follow:-

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



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## Setup On Local System

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### 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`





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## Installation - Requirements

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### 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](mailto:hello@micropyramid.com)"