# Django-CRM Documentation

***Release 0.4.0***

**Django-CRM**

**Sep 12, 2019**

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# CHAPTER 1

## Introduction:

Django CRM is opensourse 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

CHAPTER 3

# Modules available in Django-CRM:

## 3.1 User functionalites:

### 3.1.1 Login

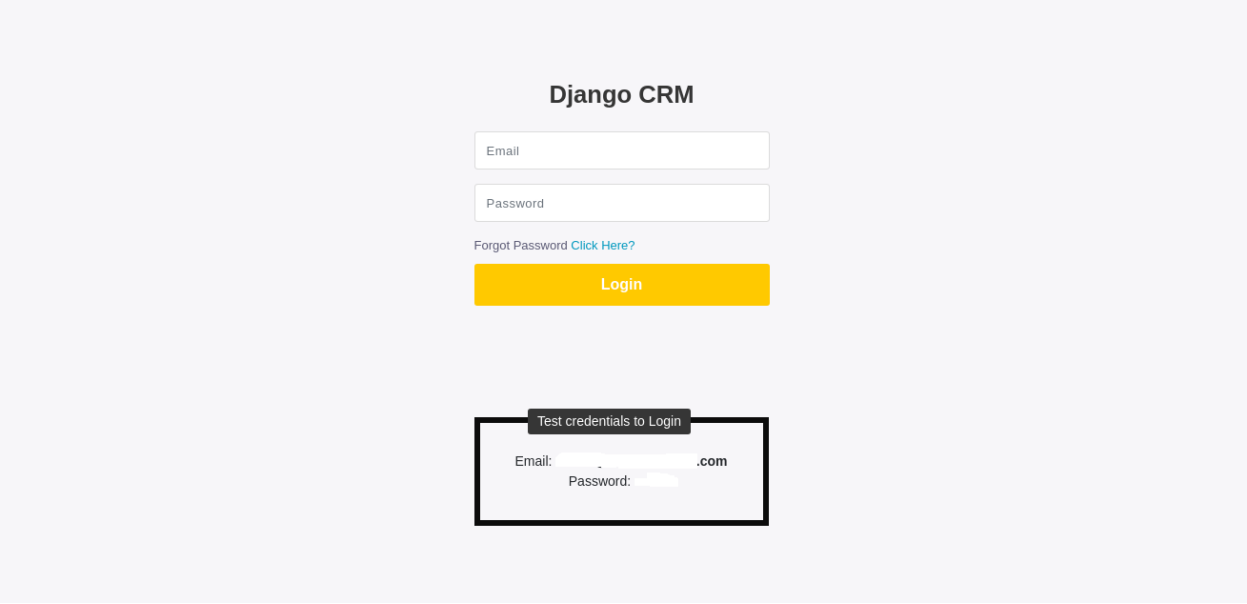


**Fig** Login Page

### 3.1.2 Forget Password

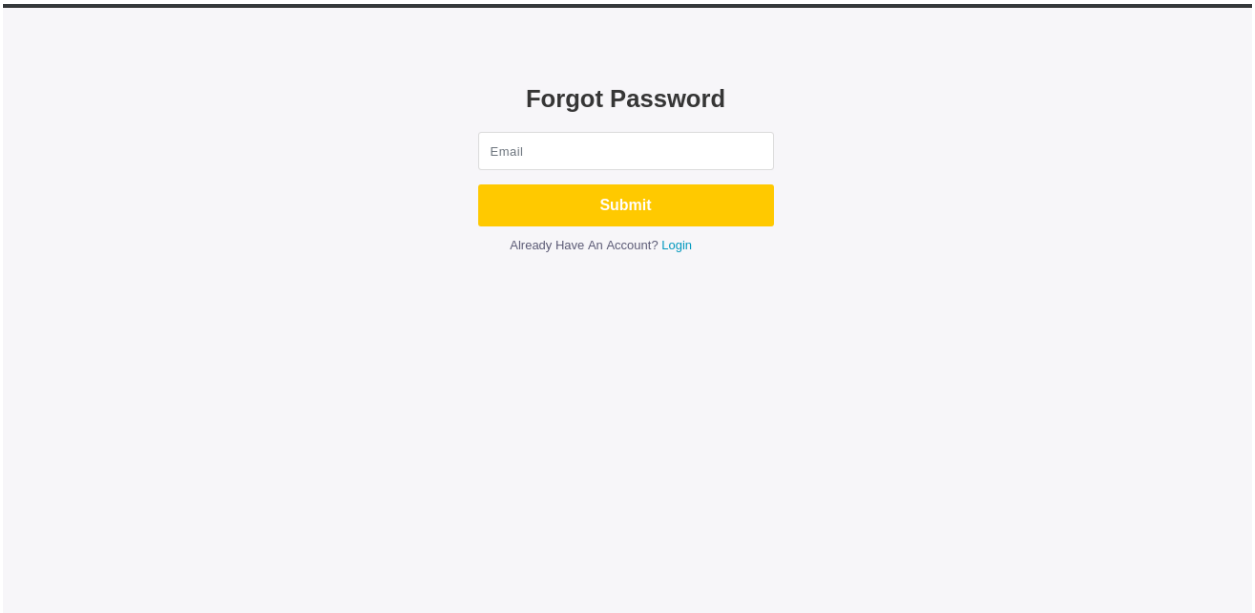


**Fig** Forget Password Page View

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

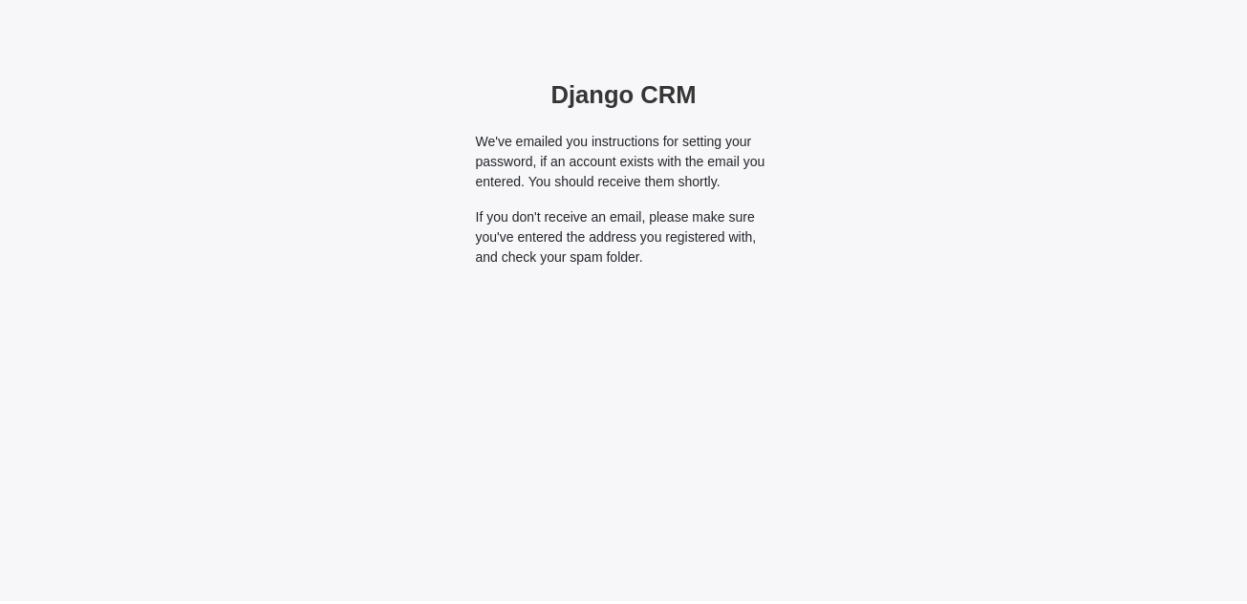


**Fig** Email Sent acknowledgement view

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

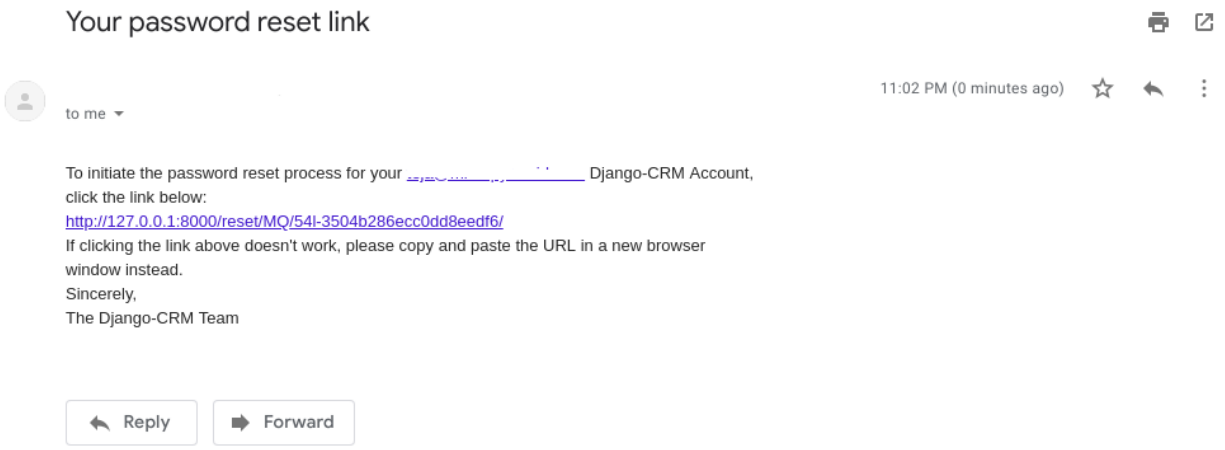


**Fig** Email recieved

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

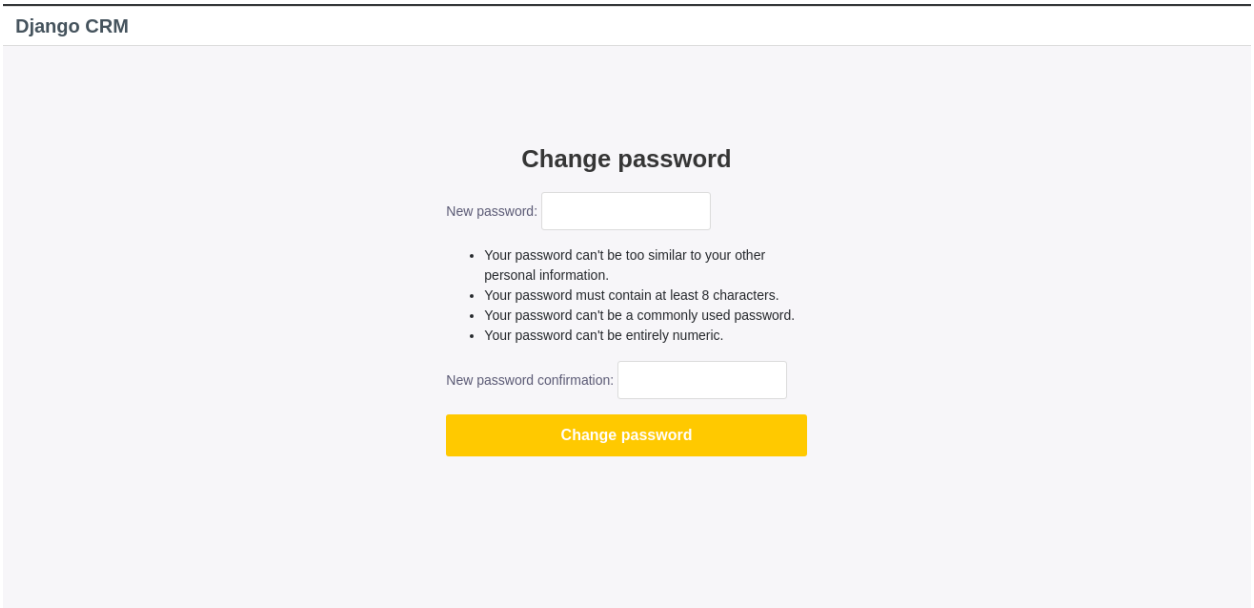


**Fig** Password Reset view

After you successful change the password you will get below page

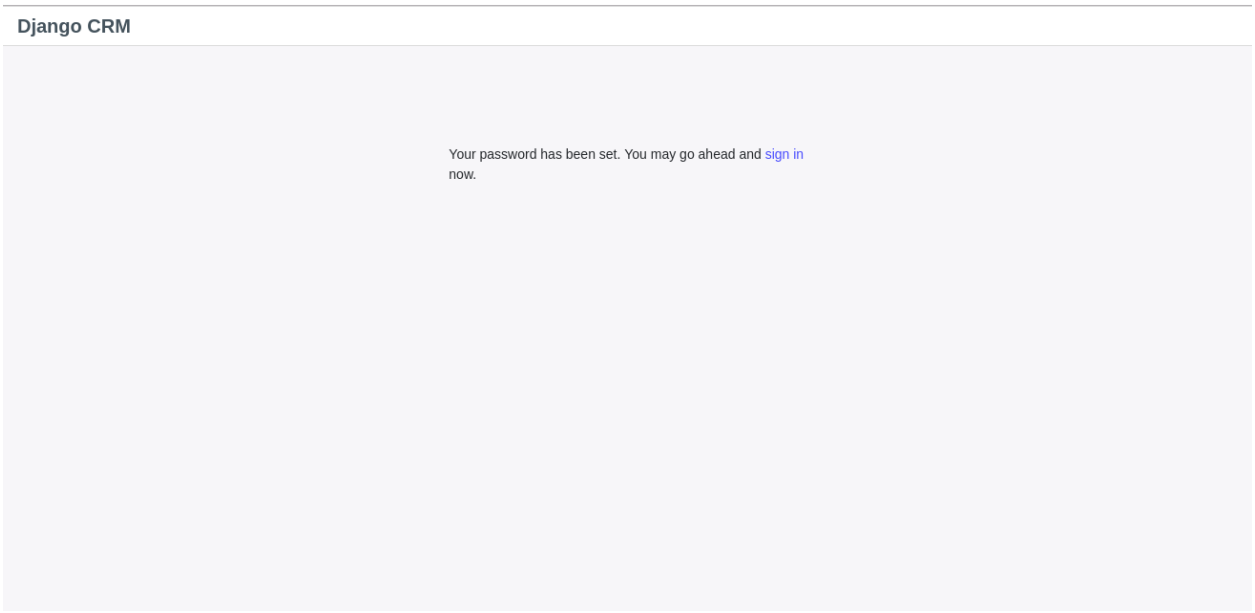


**Fig** Password Reset Successful view

Now click on login and enter your credentials

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

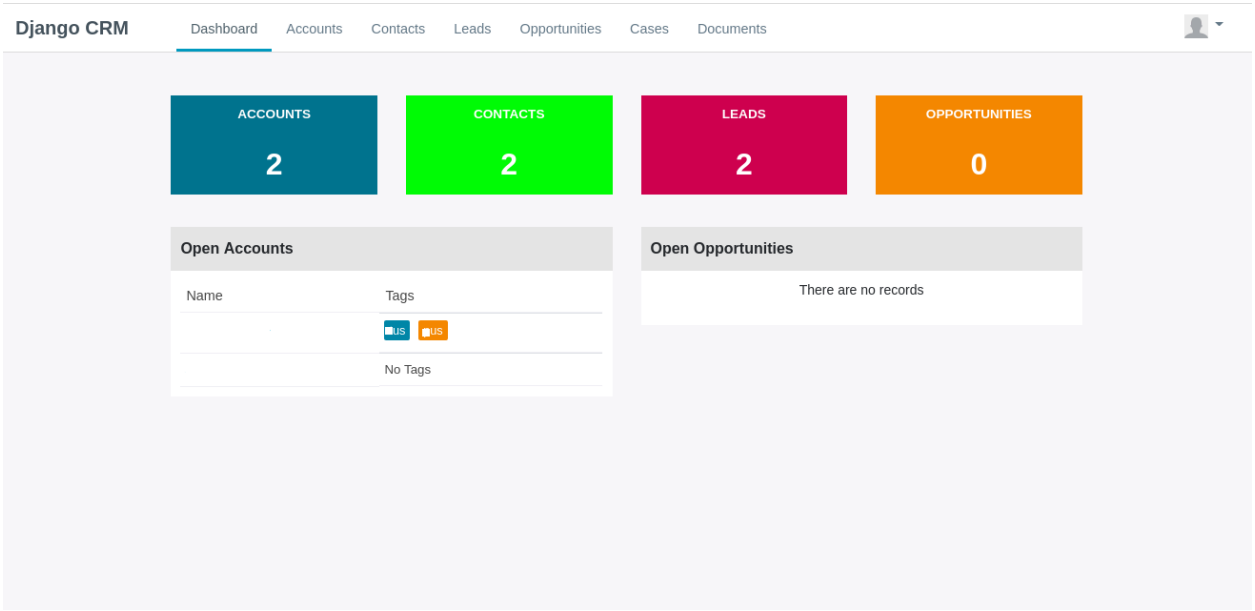


**Fig** Dashboard view

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

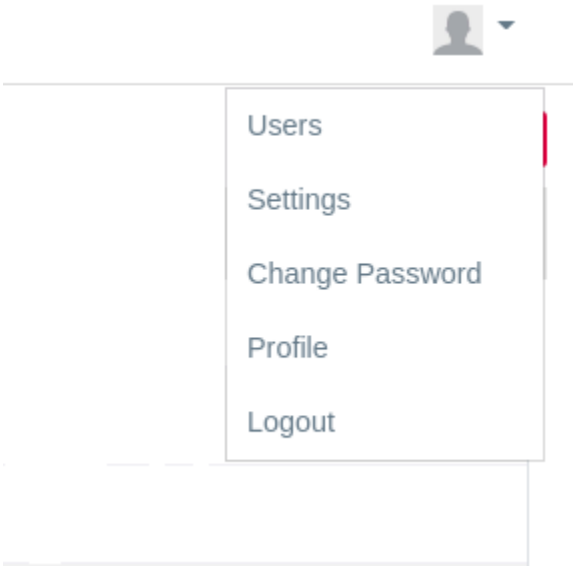


**Fig** Dropdown menu

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

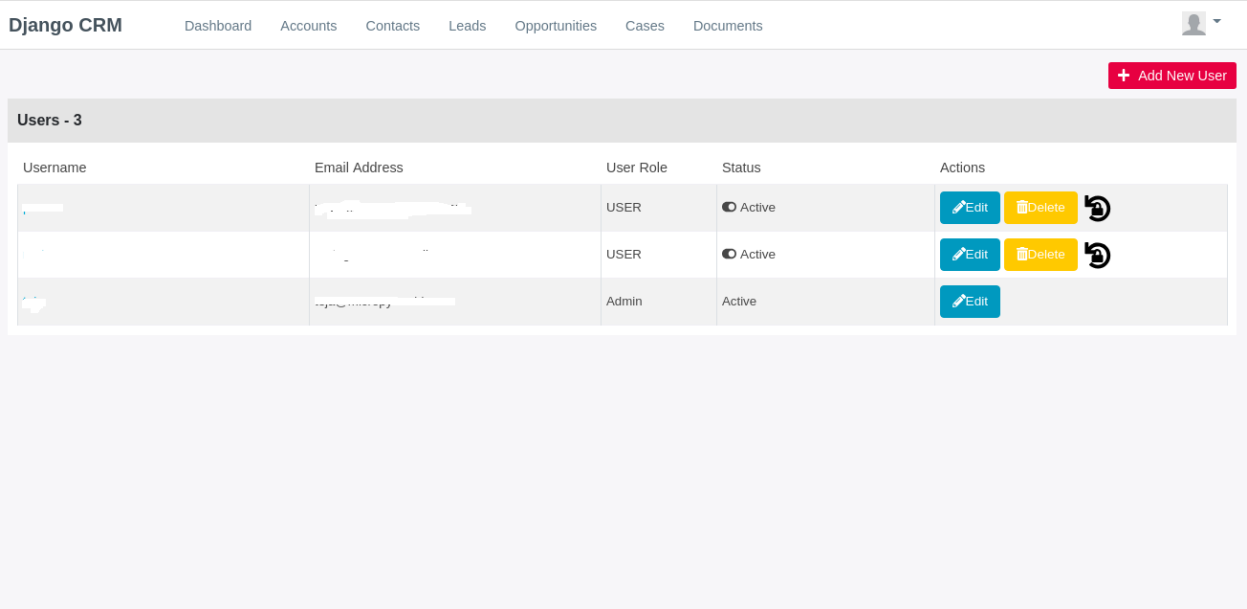


**Fig:** Users view

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:

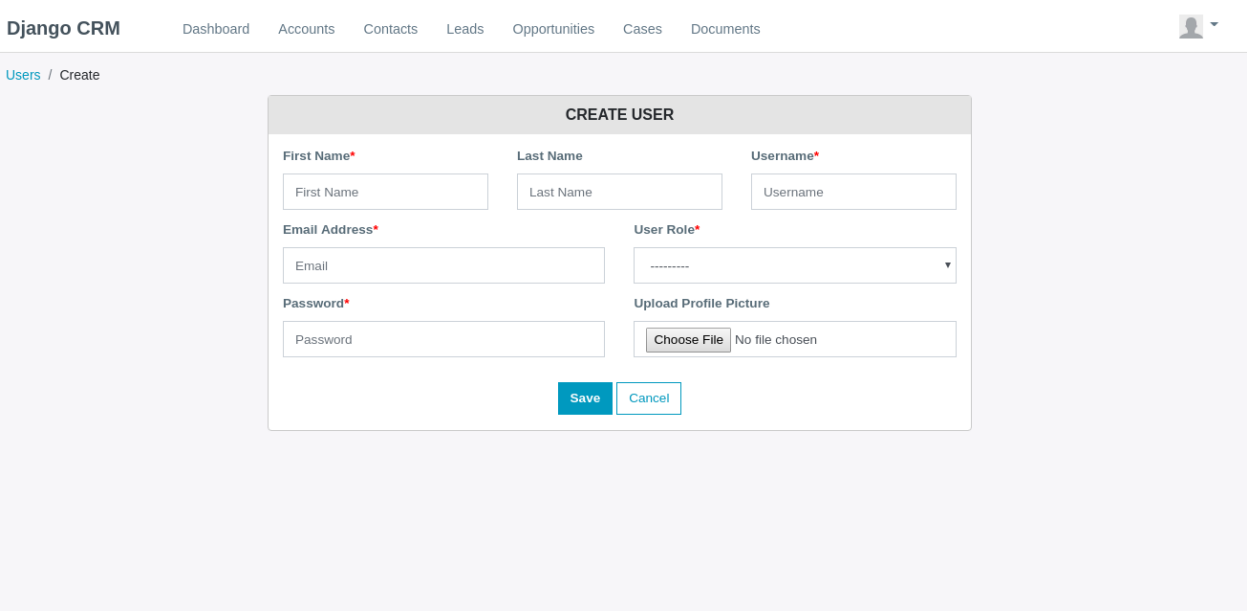

**Fig** User create page

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

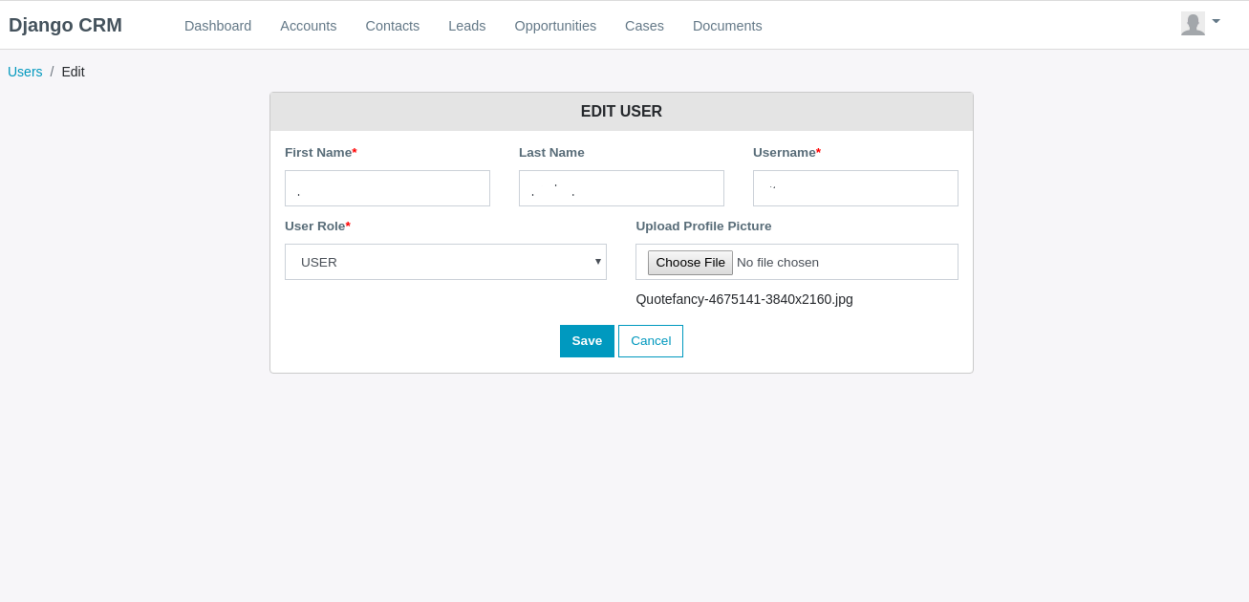


**Fig:** User Edit User page

## Settings

On clicking settings, the following page is shown:

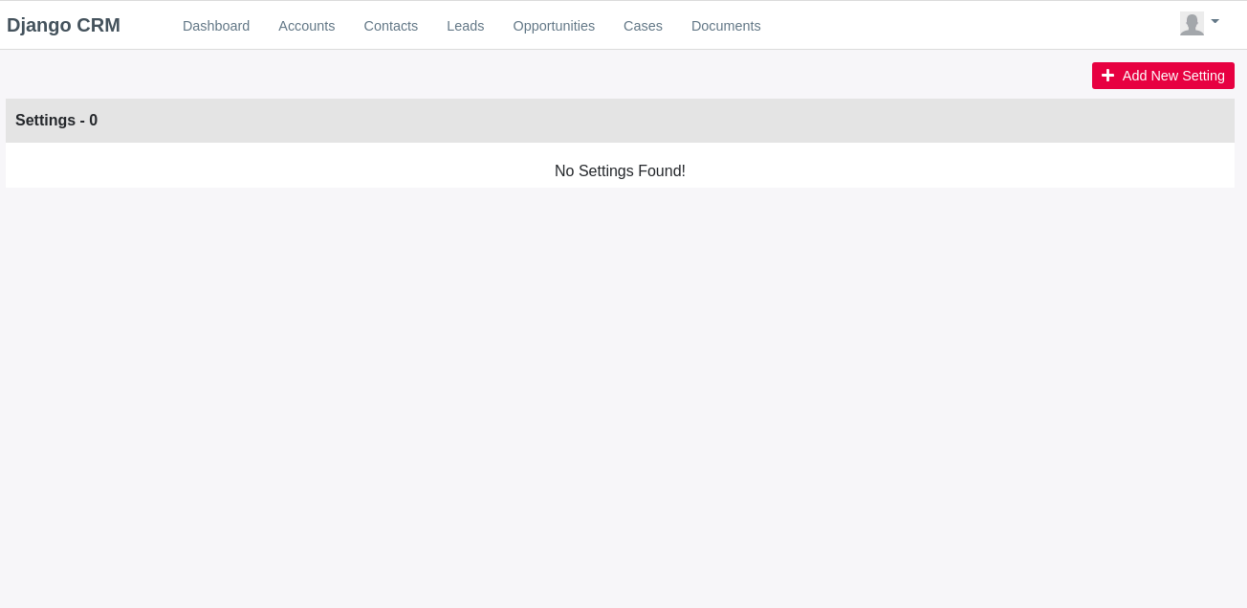


**Fig:** User Settings page

Click on ‘‘ + Add New Setting‘‘

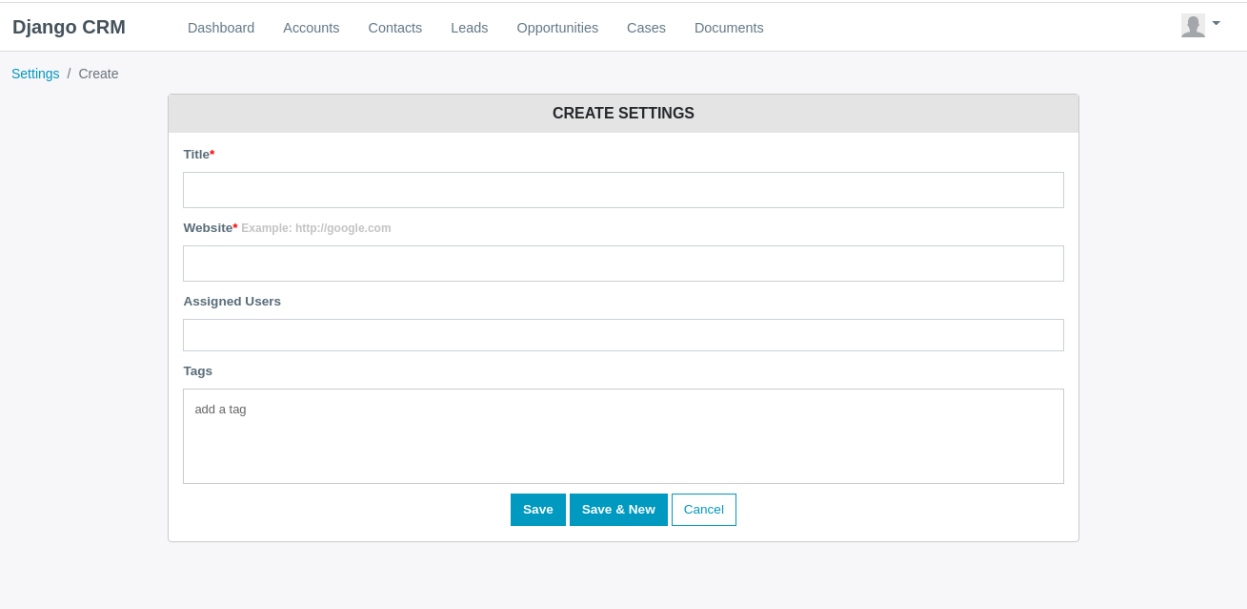


**Fig:** User Create Setting page

### Change Password

On clicking settings, the following page is shown:

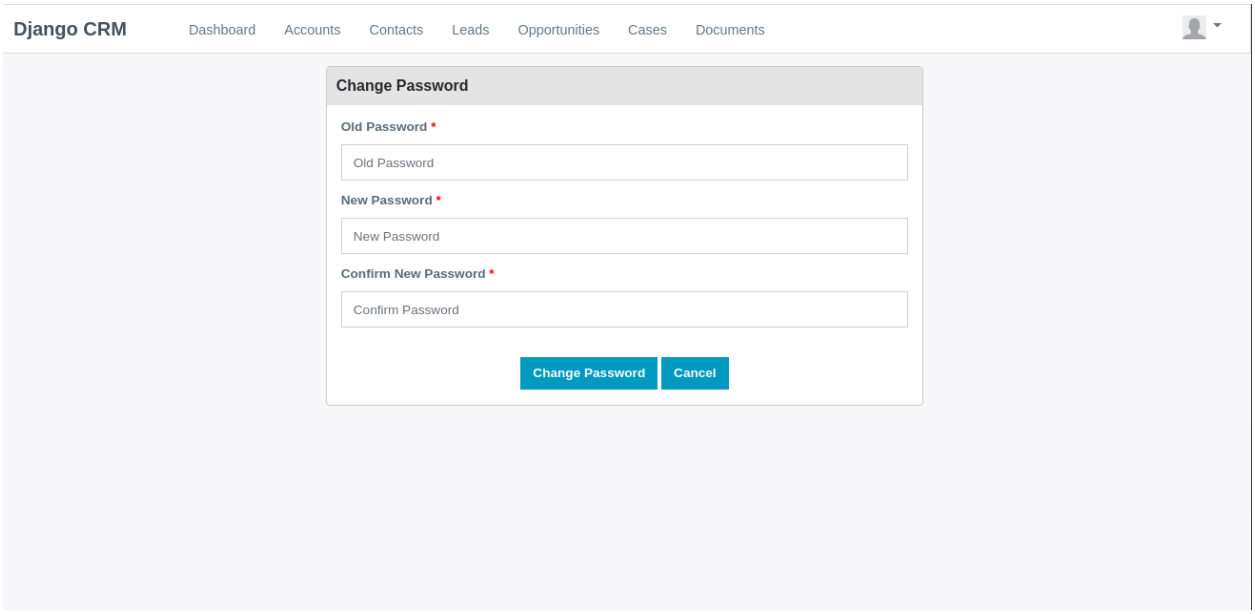


**Fig:** User Change password page

### Profile

On clicking settings, the following page is shown:

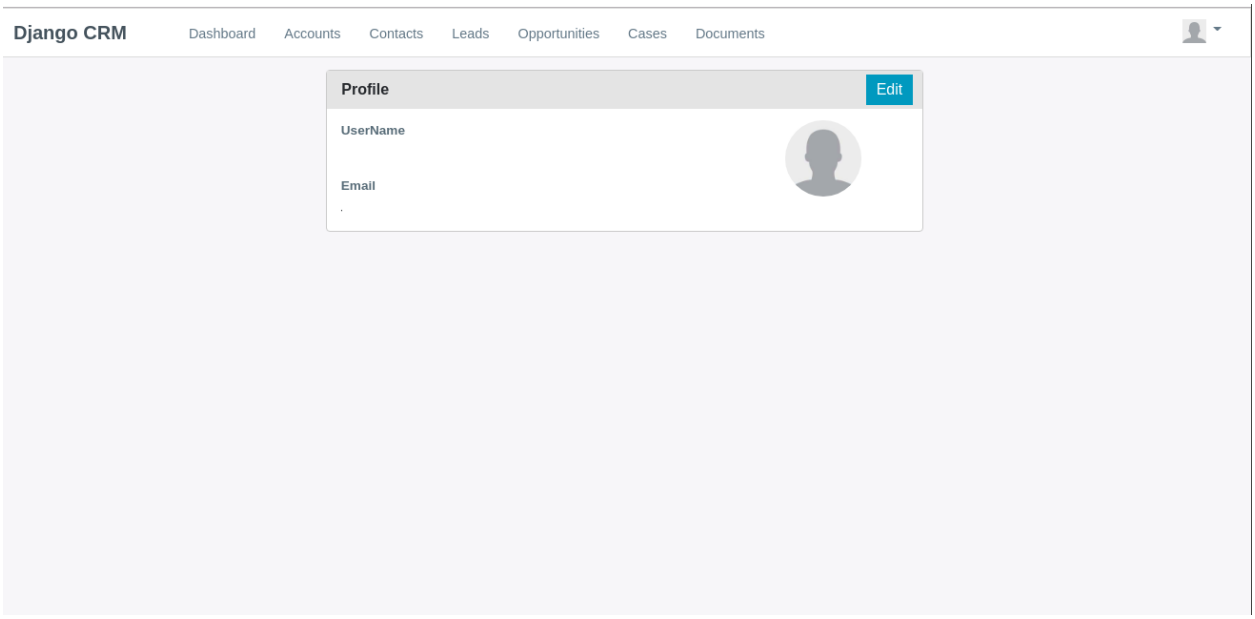

**Fig:** User profile page

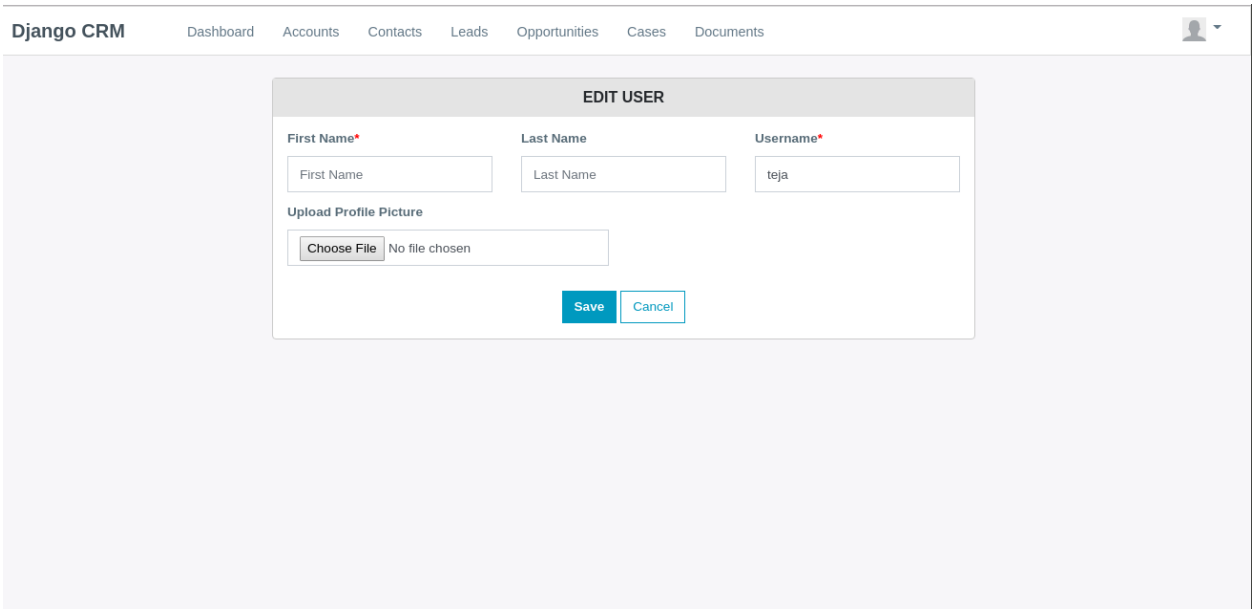


**Fig:** User edit profile page

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

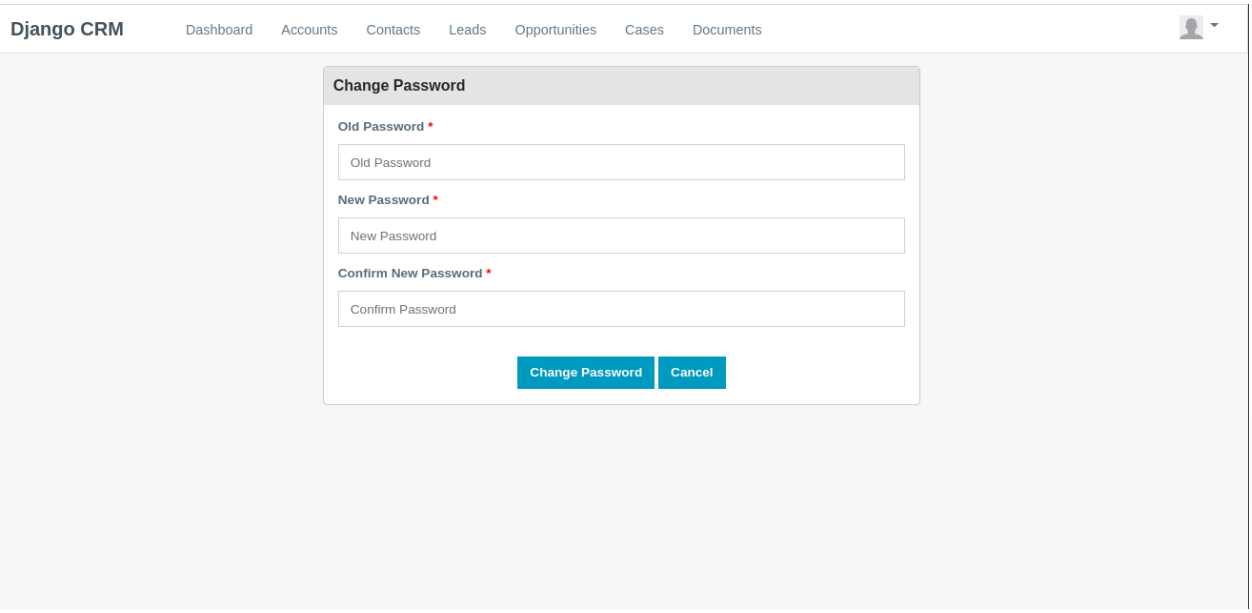


**Fig** Password Change Page

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

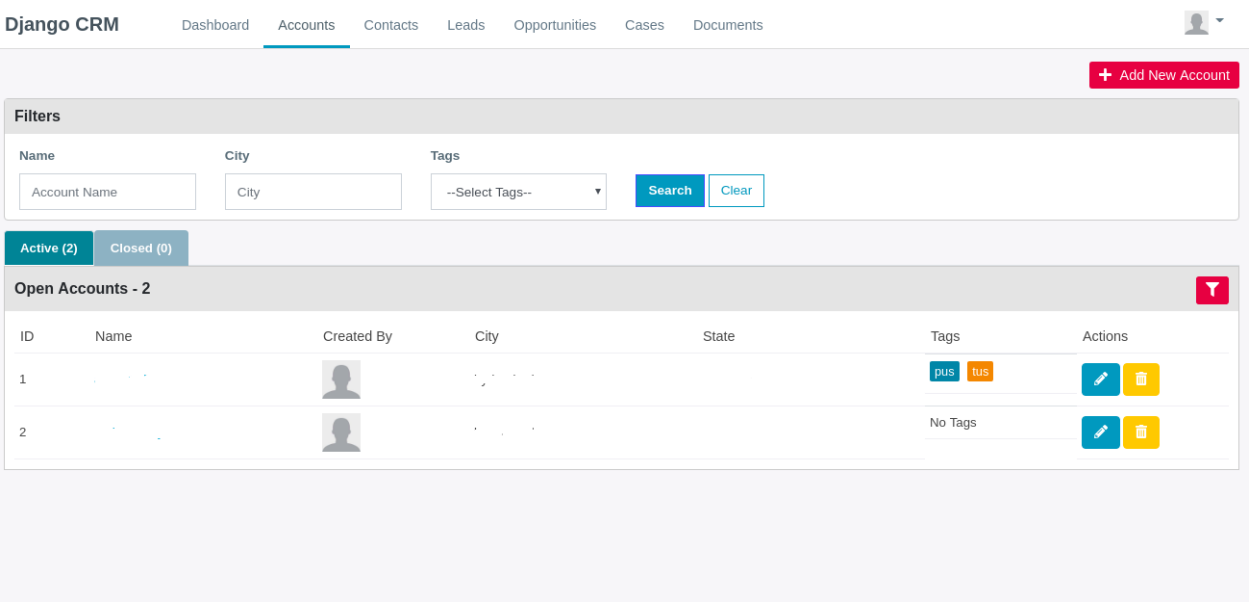


**Fig** Accounts page

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 .

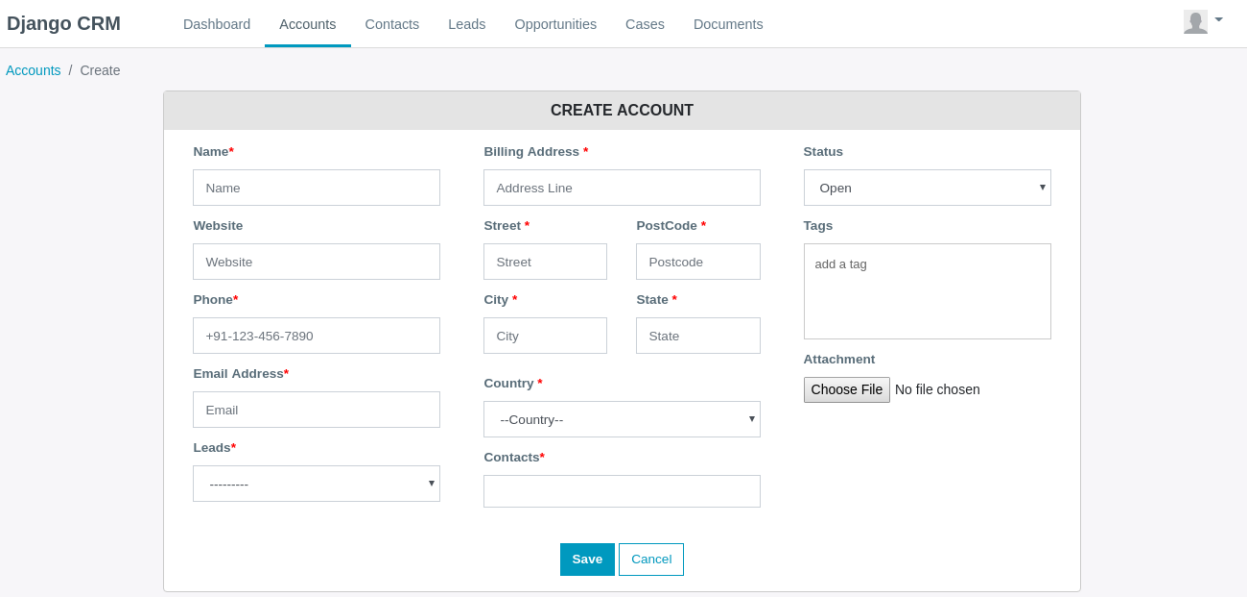


**Fig** Account create page

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

**Note:** Fields having $\star$ are mandatory

### 3.2.2 Contacts

Contacts can be created and can be assigned to Accounts

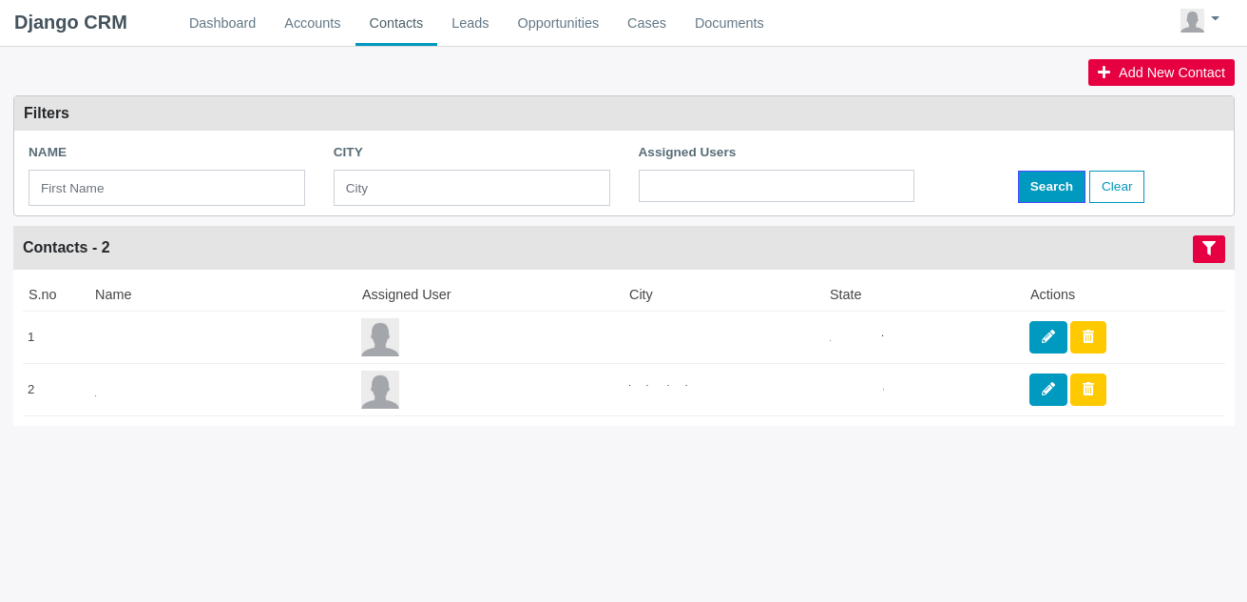

**Fig** Contacts Home Page

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`

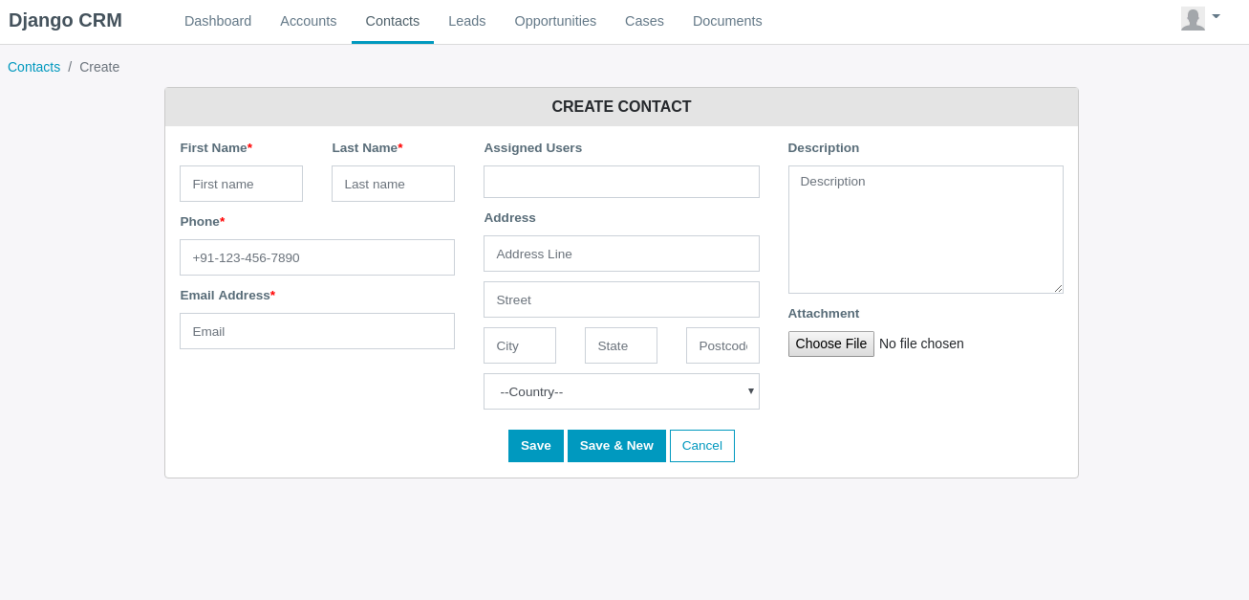


**Fig** Contacts Create Page

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

**Note:** To create a contacts lead is required.

### 3.2.3 Leads

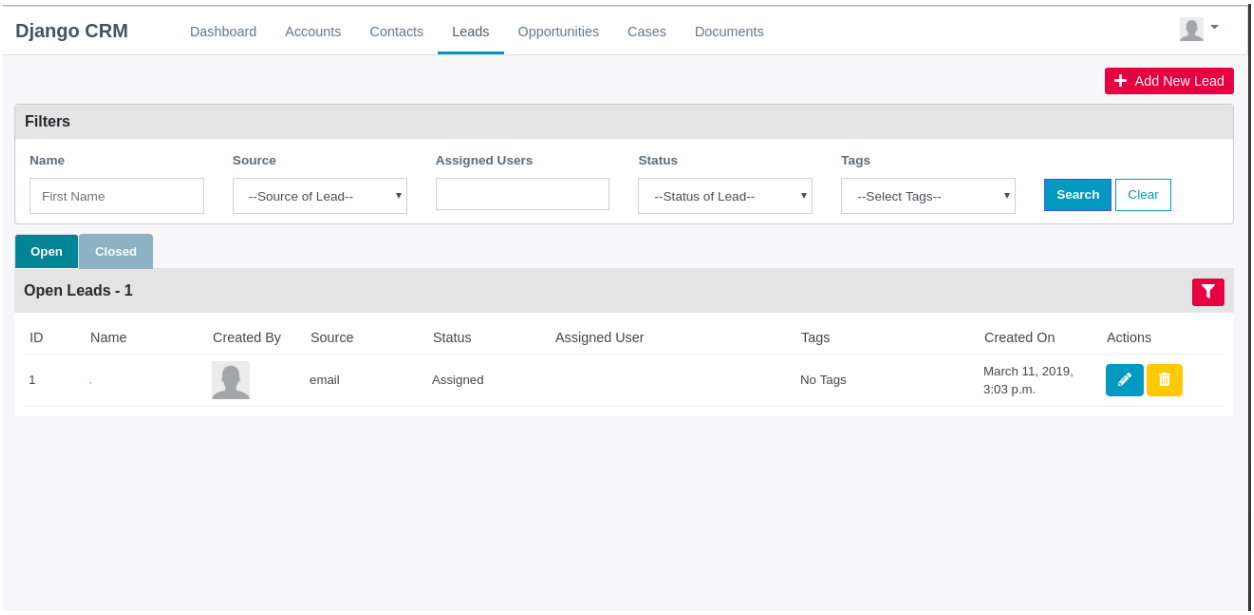


**Fig** Accounts Home Page

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`

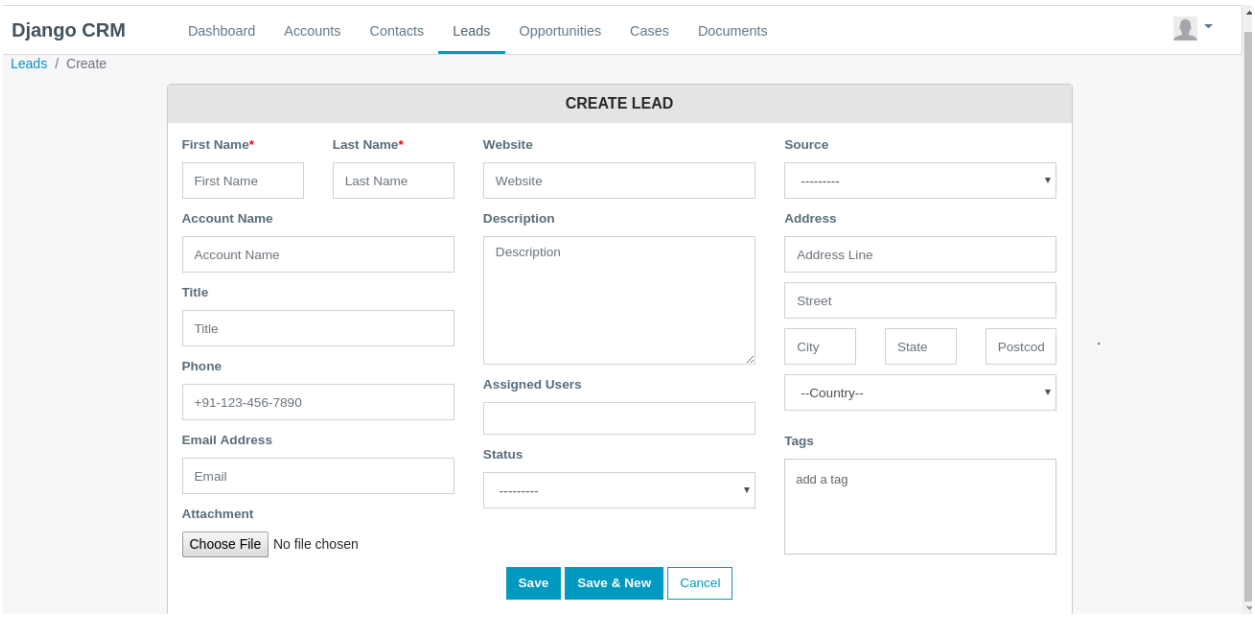

**Fig** Leads Create Page

**Note:** Fields having * are mandatory

### 3.2.4 Opportunity

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

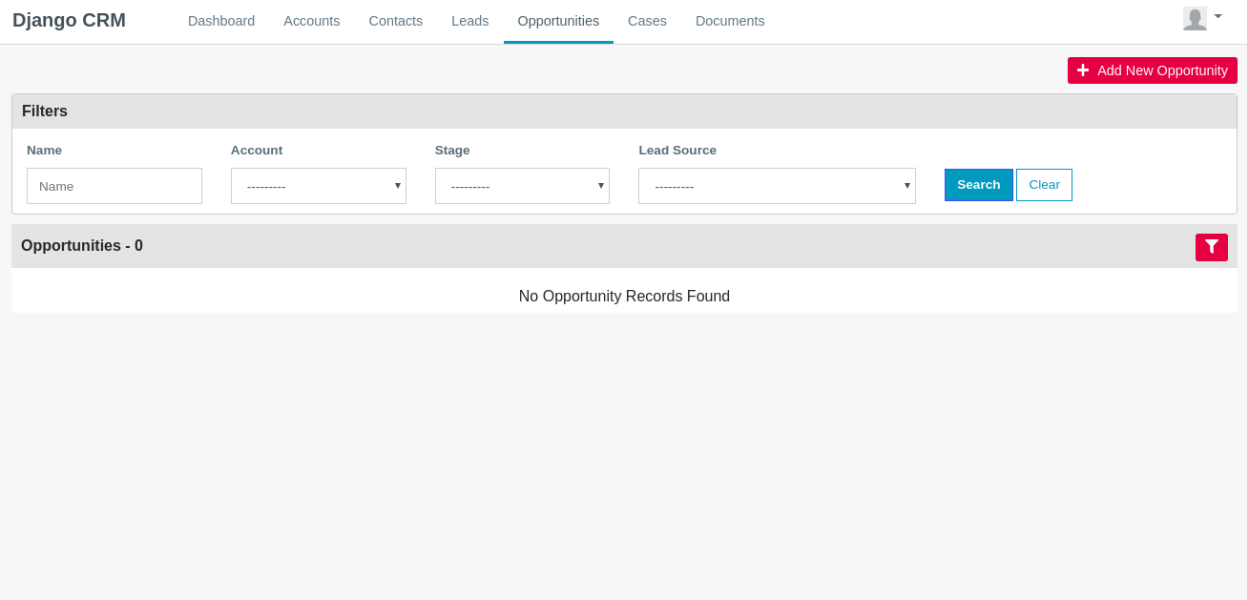


**Fig** Opportunity Home Page

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`

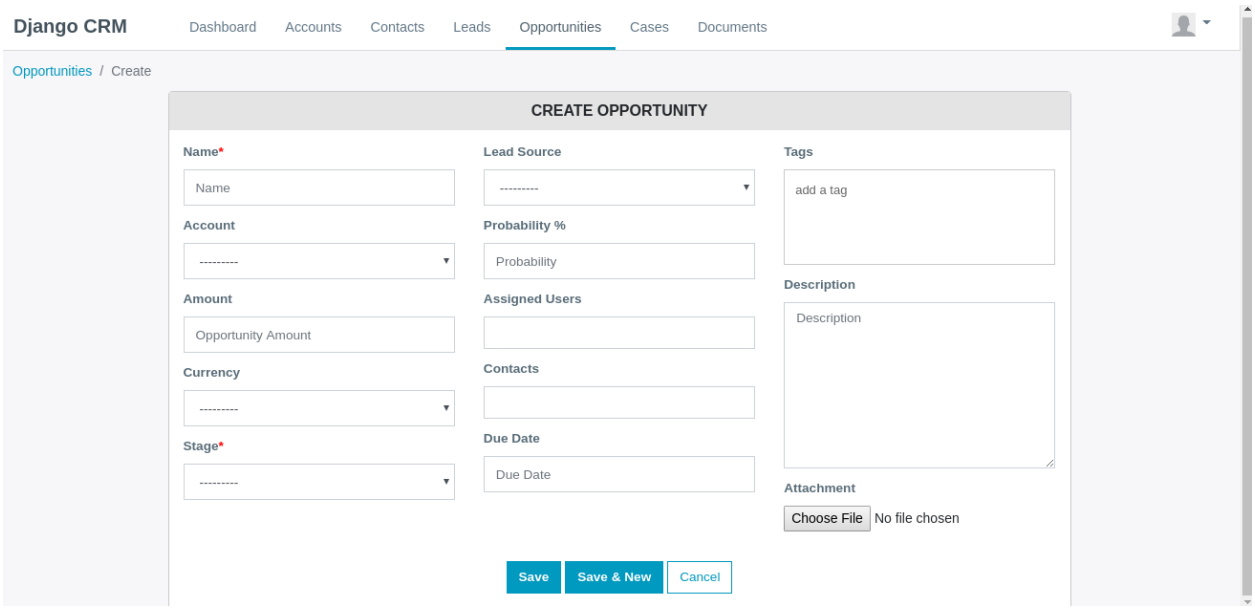


**Fig** Opportunity Create Page

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

**Note:** To create a Opportunity lead is required.

### 3.2.5 Cases

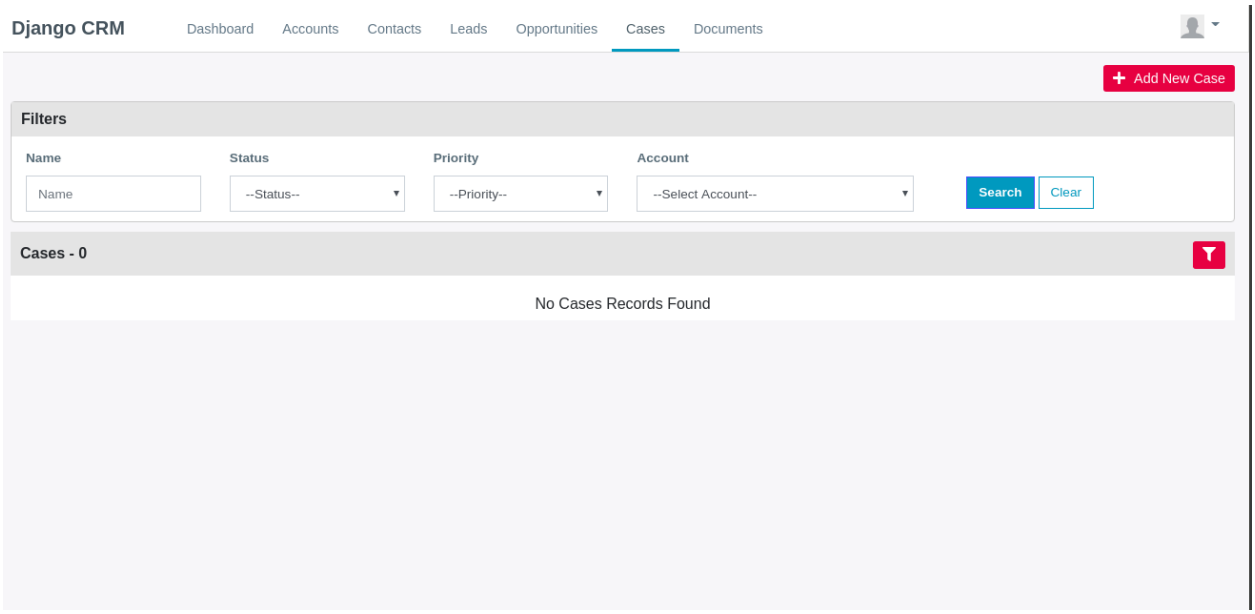

**Fig** cases Home Page

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`

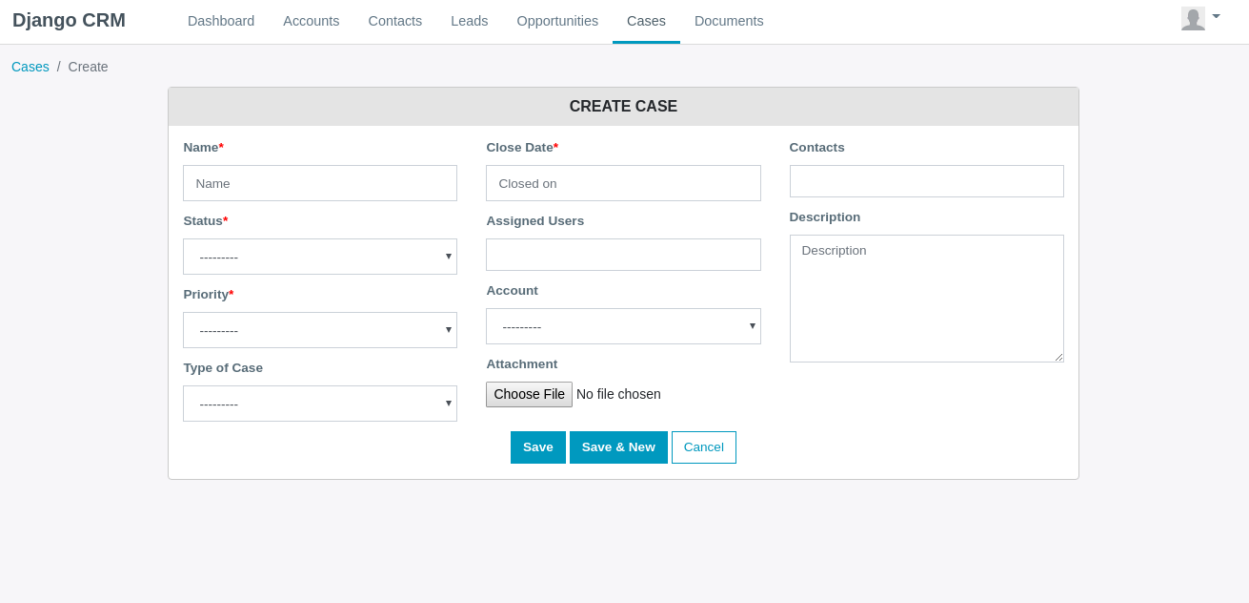


**Fig** cases Create Page

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

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

### 3.2.6 Documents

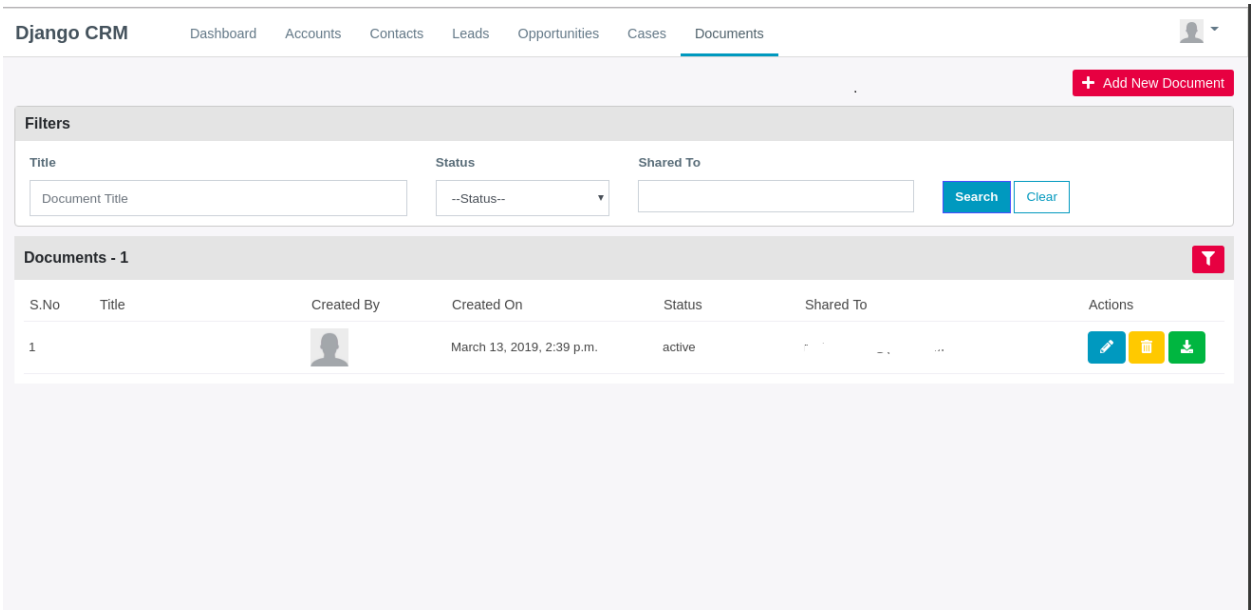


**Fig** documents Home Page

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`

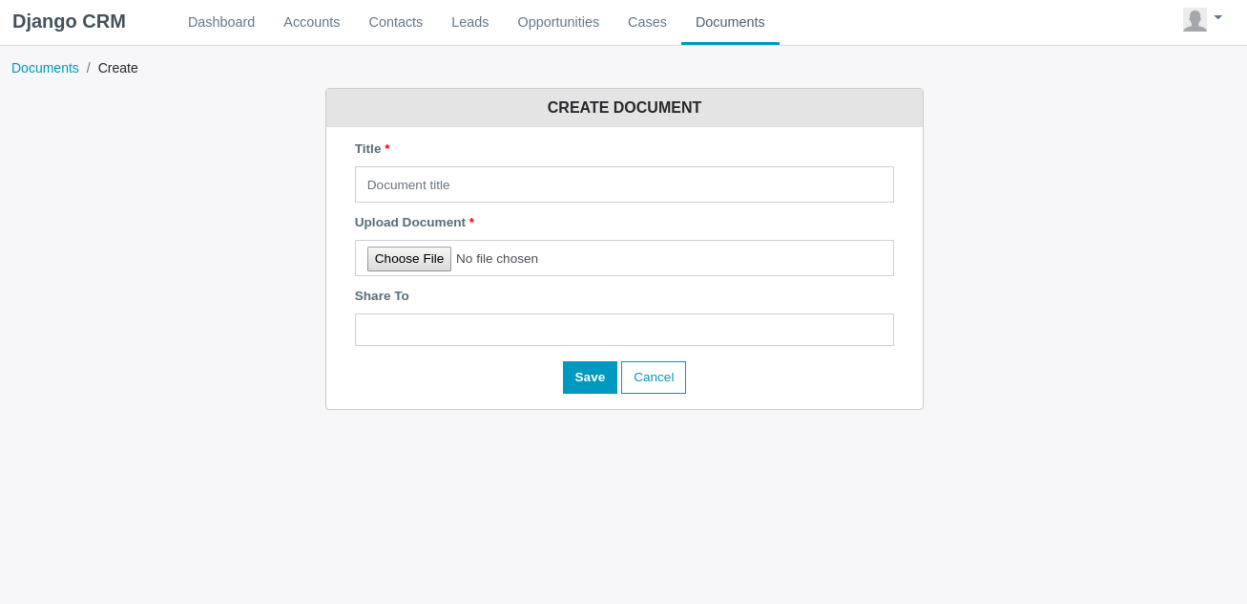

**Fig** Documents Create Page

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

# CHAPTER 4

## Rules to follow:-

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

CHAPTER 5

# 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`

CHAPTER 6

# 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"