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

Modules available in Django-CRM:

3.1 User functionalites:

3.1.1 Login

Django CRM

Email

Password

Forgot Password [Click Here?](#)

Test credentials to Login

Email: .com

Password:

Fig Login Page

3.1.2 Forget Password

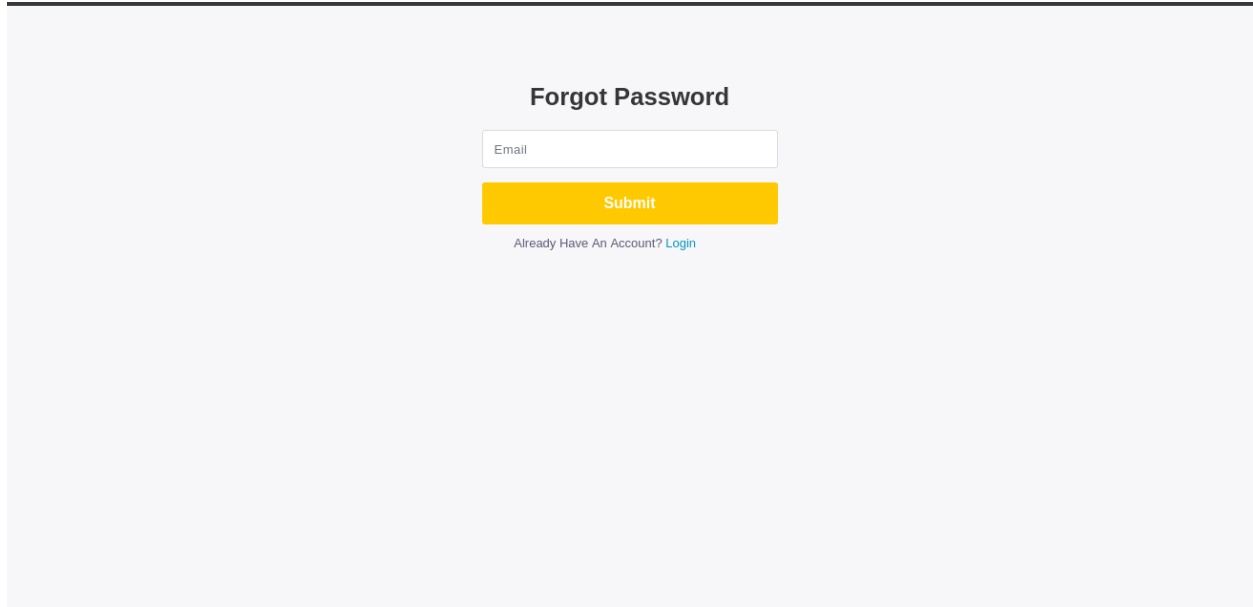


Fig Forget Password Page View

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

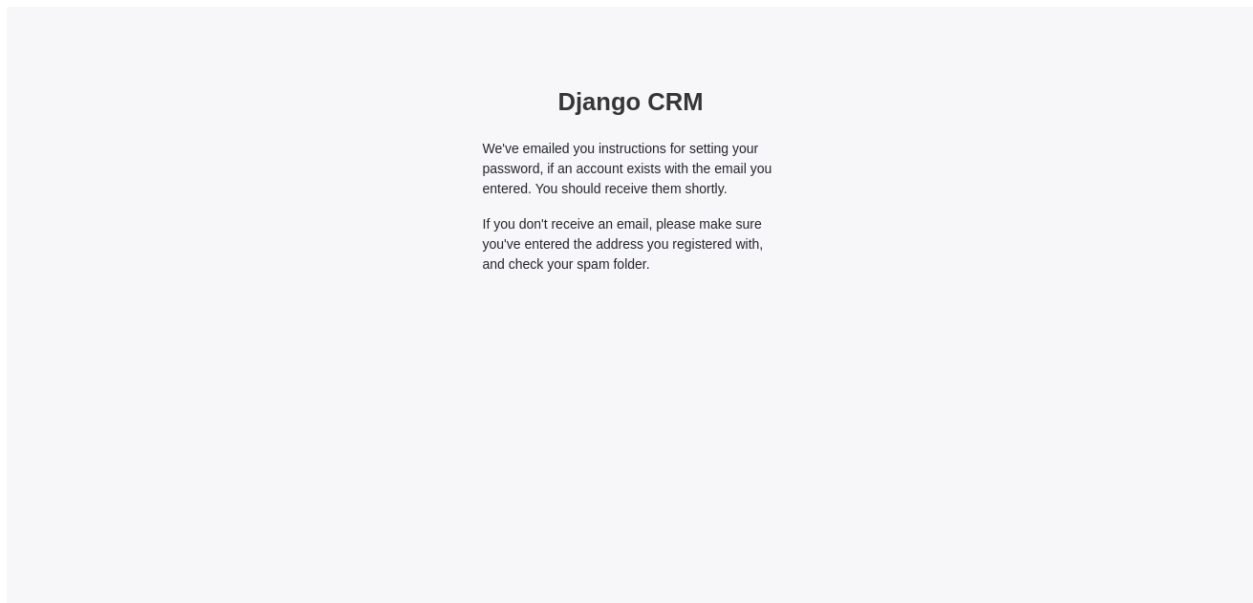


Fig Email Sent acknowledgement view

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

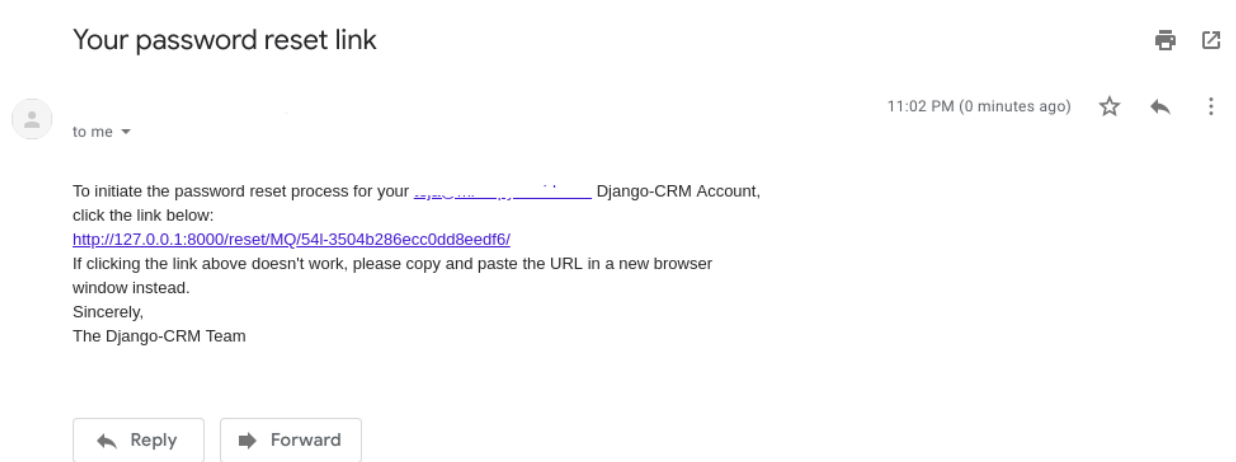


Fig Email recieved

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

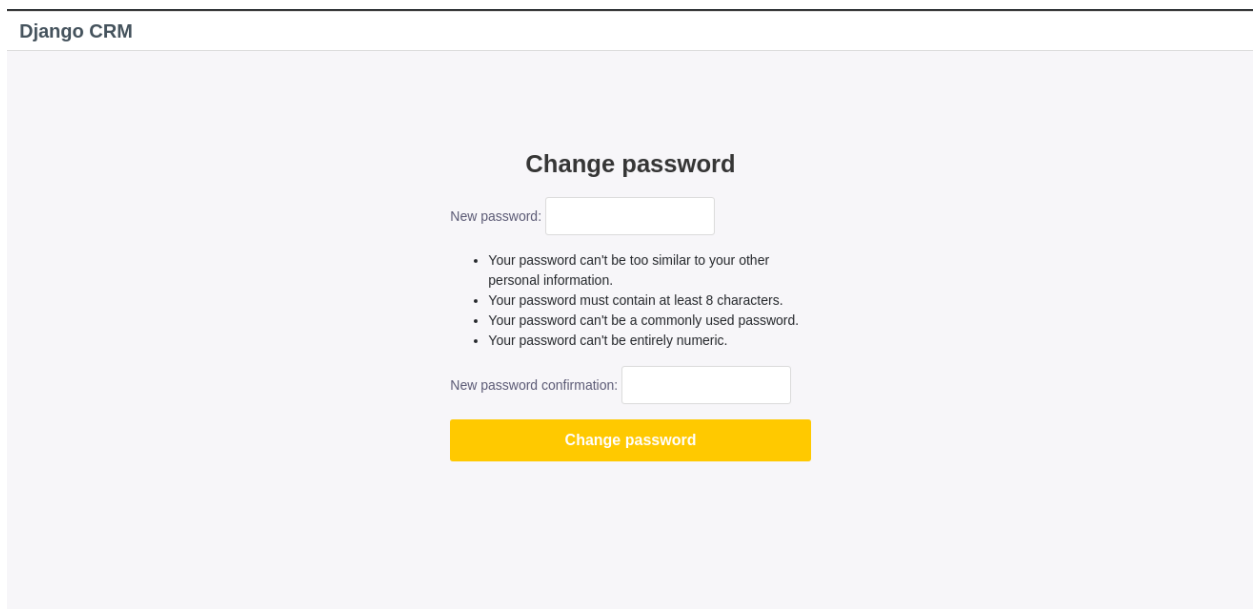


Fig Password Reset view

After you successful change the password you will get below page

Django CRM

Your password has been set. You may go ahead and [sign in](#) now.

Fig Password Reset Successful view

Now click on login and enter your credentials

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

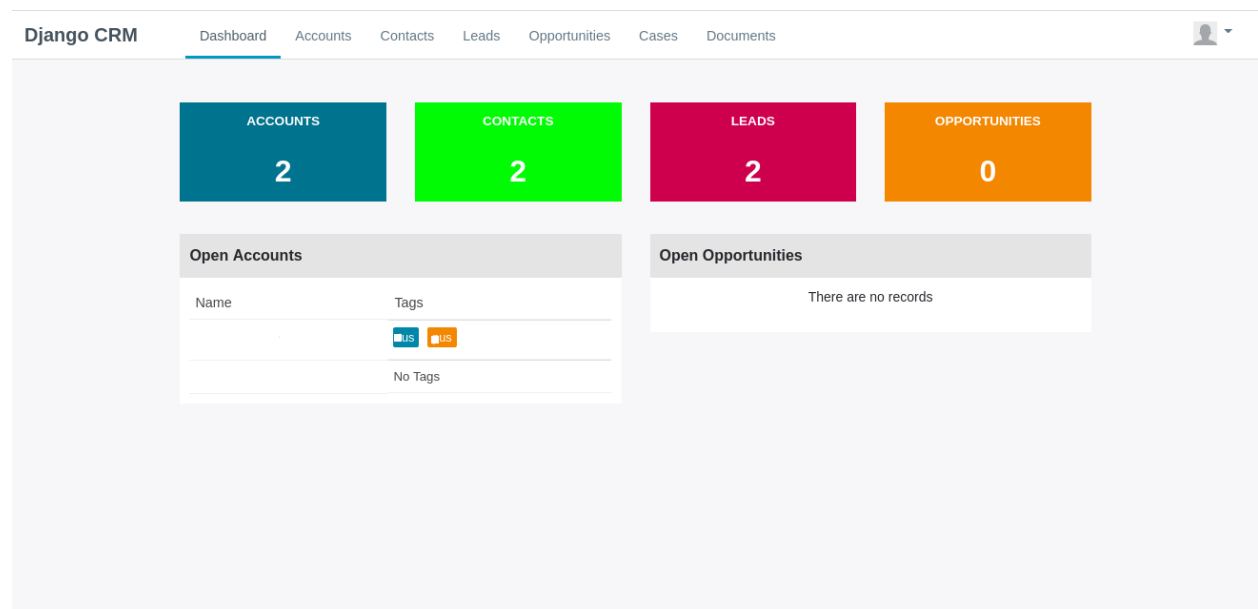


Fig Dashboard view

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

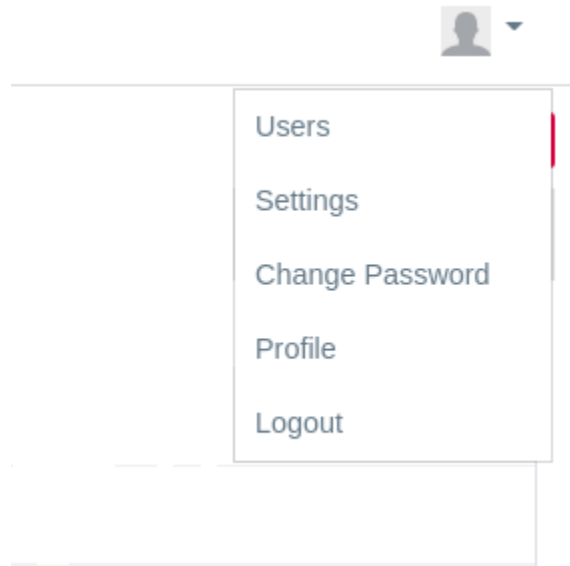


Fig Dropdown menu

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

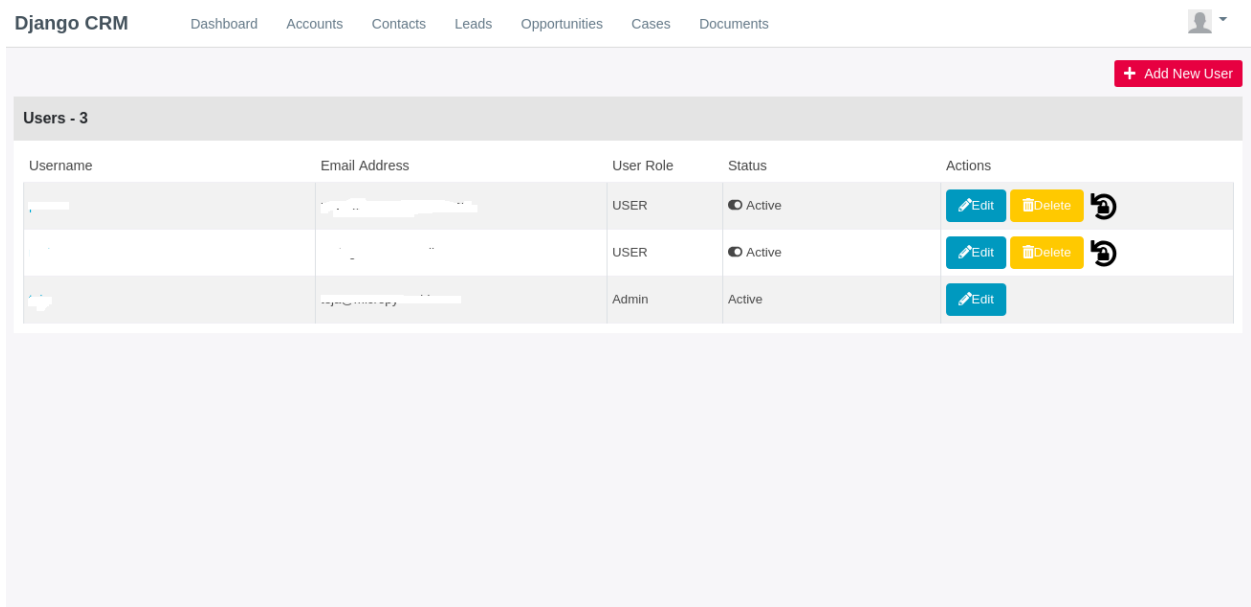


Fig: Users view

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:

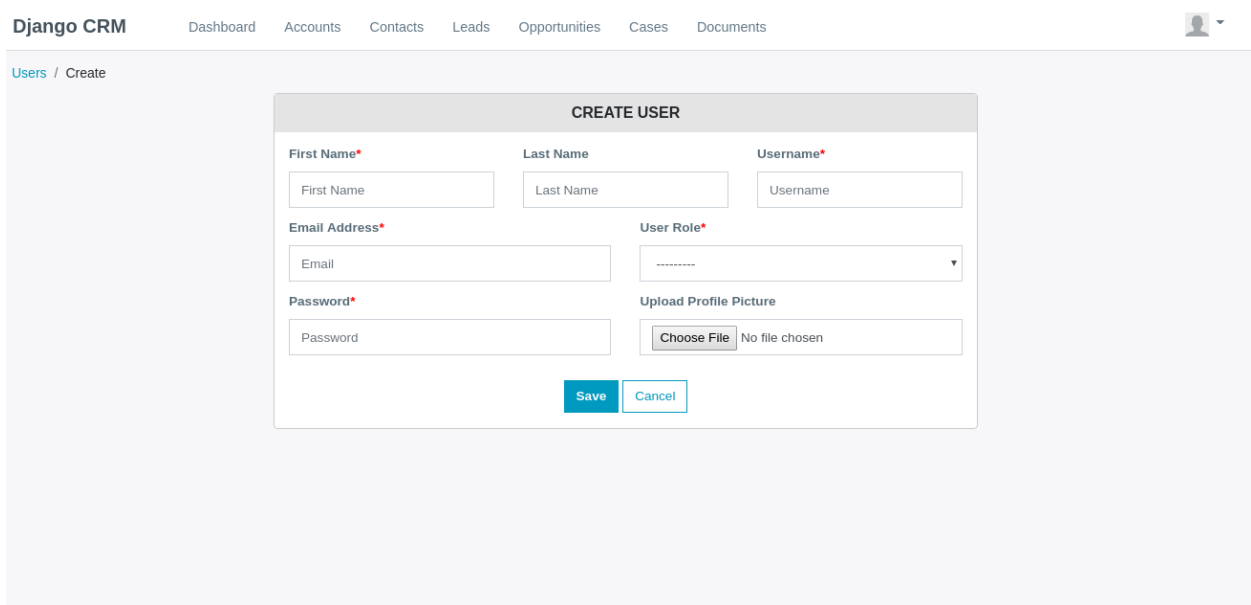


Fig User create page

Note: Fields having * are mandatory.

The screenshot shows the 'EDIT USER' form in the Django CRM interface. The form is titled 'EDIT USER' and contains the following fields and elements:

- First Name***: A text input field with a red asterisk indicating it is mandatory.
- Last Name**: A text input field.
- Username***: A text input field with a red asterisk indicating it is mandatory.
- User Role***: A dropdown menu with 'USER' selected and a red asterisk indicating it is mandatory.
- Upload Profile Picture**: A section containing a 'Choose File' button and the text 'No file chosen'. Below this, the filename 'Quotefancy-4675141-3840x2160.jpg' is displayed.
- Save** and **Cancel**: Two buttons at the bottom of the form.

Fig: User Edit User page

Settings

On clicking settings, the following page is shown:

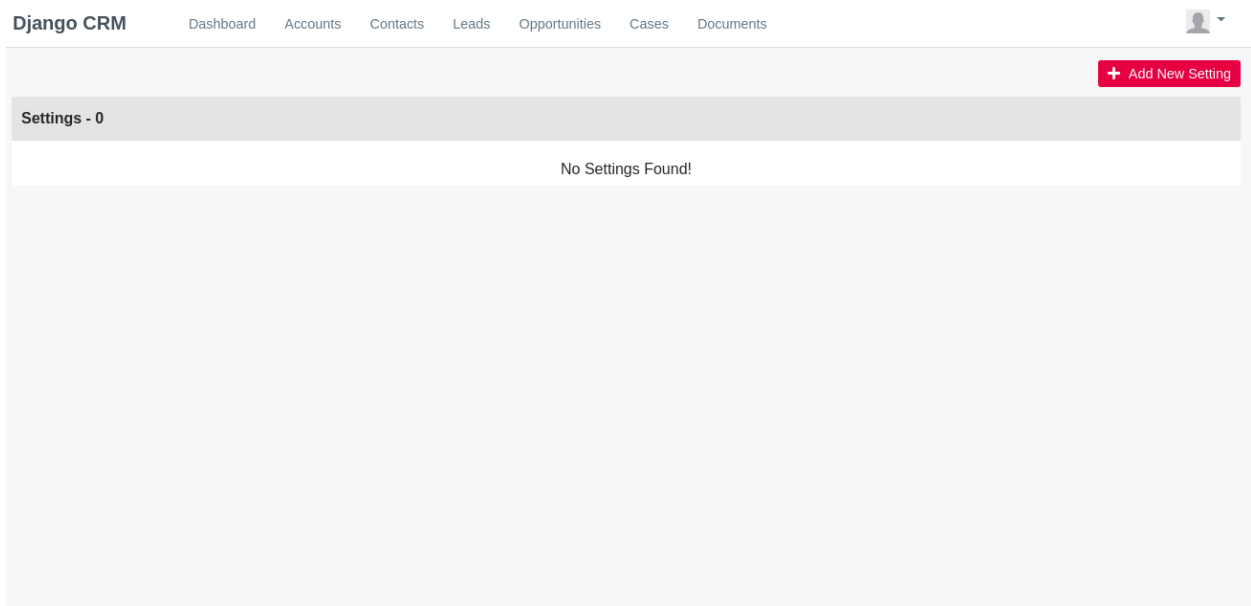


Fig: User Settings page

Click on “ + Add New Setting“

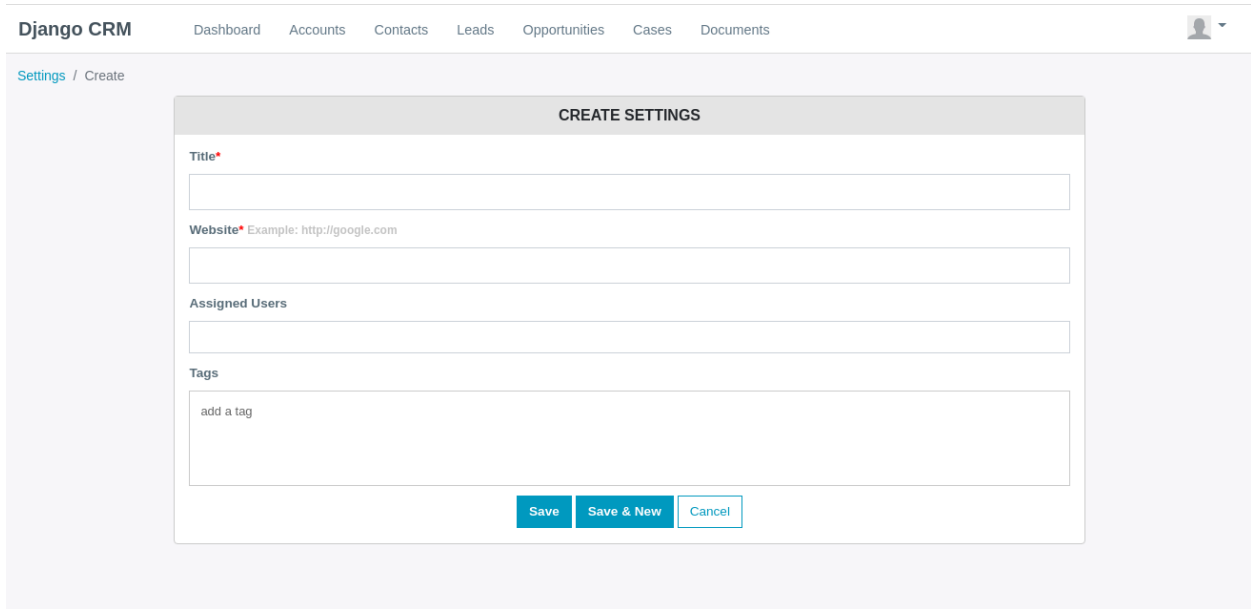
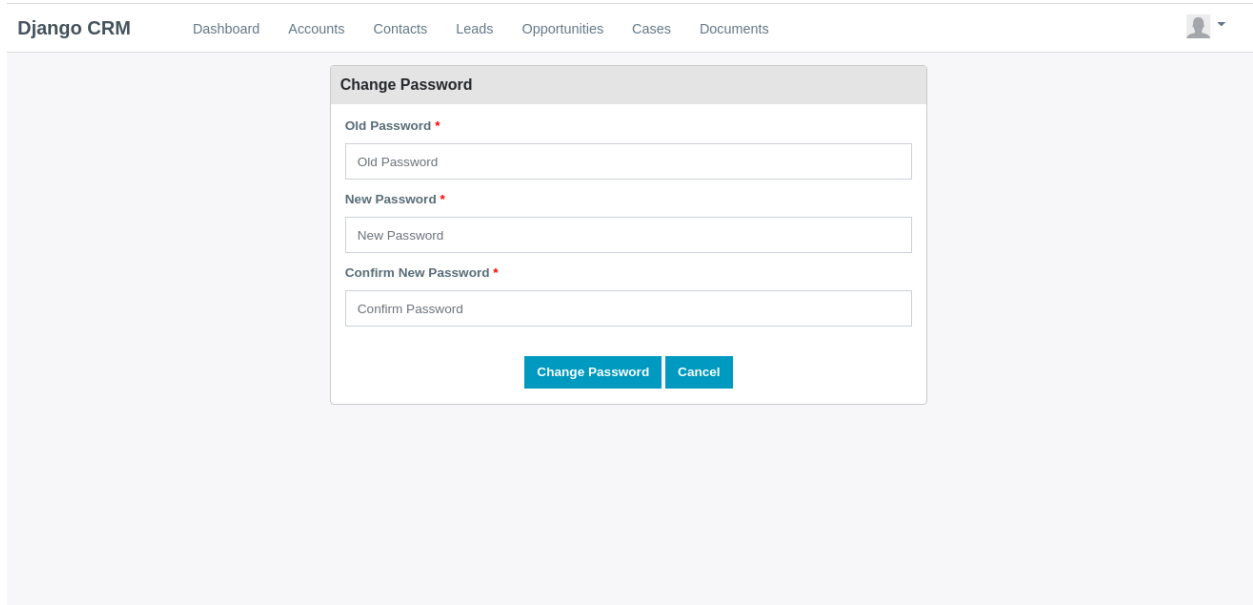


Fig: User Create Setting page

Change Password

On clicking settings, the following page is shown:

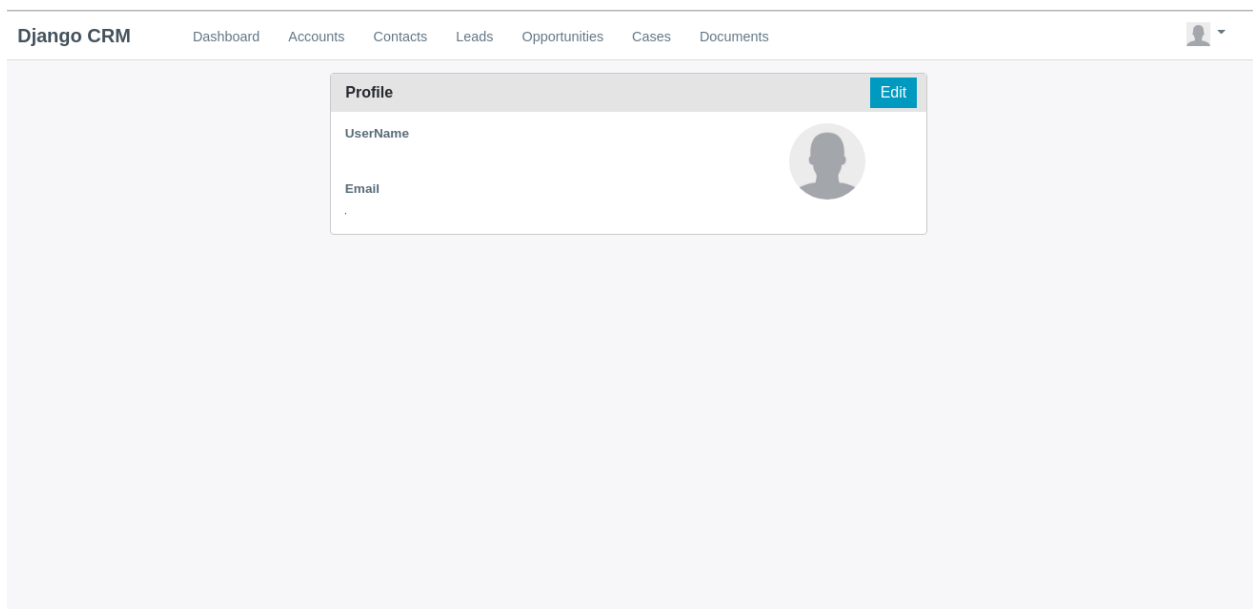


The screenshot shows the Django CRM interface with a navigation bar containing 'Dashboard', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Cases', and 'Documents'. A user profile icon is in the top right. The main content area features a 'Change Password' form with three input fields: 'Old Password',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

Fig: User Change password page

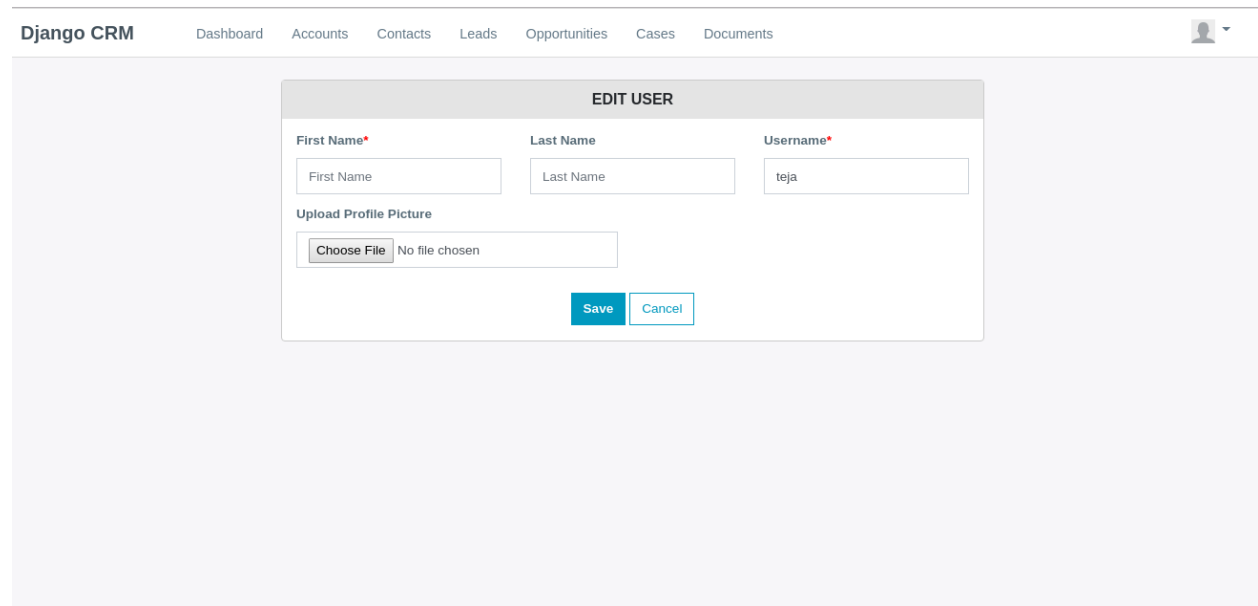
Profile

On clicking settings, the following page is shown:



The screenshot shows the Django CRM interface with the same navigation bar as the previous image. The main content area features a 'Profile' card with an 'Edit' button in the top right corner. The card contains two labels: 'UserName' and 'Email', followed by a circular placeholder for a user profile picture.

Fig: User profile page



The screenshot shows the Django CRM interface. At the top, there is a navigation bar with the following items: Django CRM, Dashboard, Accounts, Contacts, Leads, Opportunities, Cases, and Documents. On the right side of the navigation bar, there is a user profile icon with a dropdown arrow. Below the navigation bar, the main content area displays a form titled "EDIT USER". The form contains three input fields: "First Name*" (with a red asterisk), "Last Name", and "Username*" (with a red asterisk). The "First Name" field contains the text "First Name", the "Last Name" field contains "Last Name", and the "Username" field contains "teja". Below these fields is a section titled "Upload Profile Picture" which includes a "Choose File" button and the text "No file chosen". At the bottom of the form, there are two buttons: "Save" and "Cancel".

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

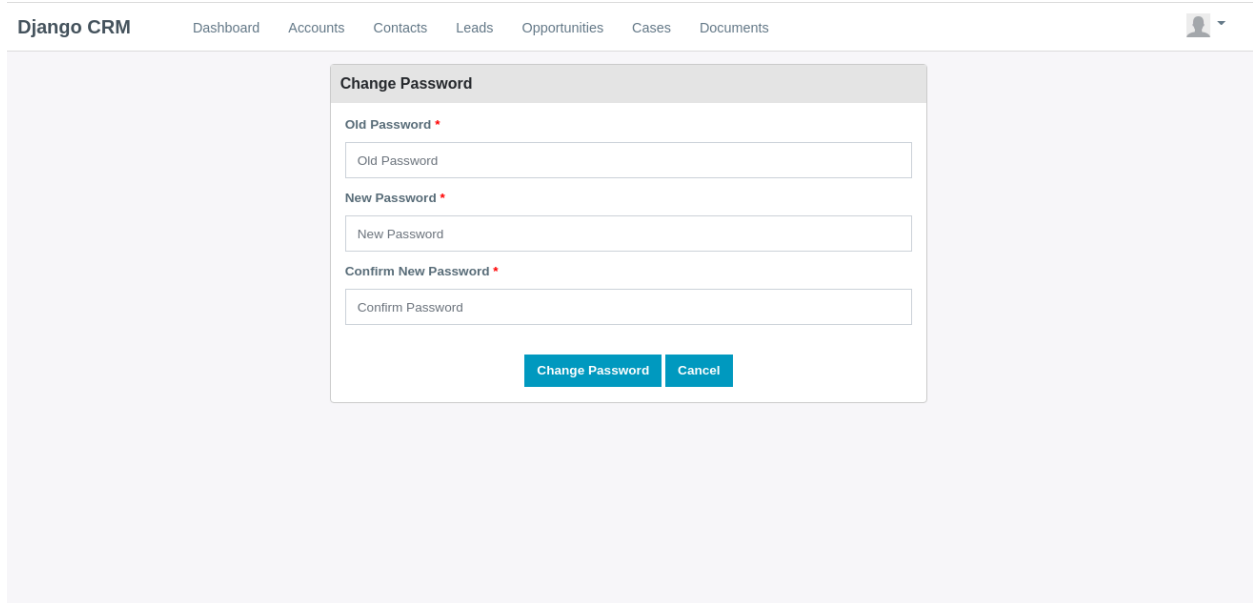
The image shows a screenshot of the Django CRM web application. At the top, there is a navigation bar with the text "Django CRM" on the left and a series of menu items: "Dashboard", "Accounts", "Contacts", "Leads", "Opportunities", "Cases", and "Documents". On the right side of the navigation bar, there is a user profile icon. Below the navigation bar, the main content area displays a "Change Password" form. The form has a title "Change Password" and three input fields: "Old Password", "New Password", and "Confirm New Password". Each field has a red asterisk next to its label. Below the input fields, there are two buttons: "Change Password" and "Cancel".

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					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

<p>Name*</p> <input type="text" value="Name"/>	<p>Billing Address *</p> <input type="text" value="Address Line"/>	<p>Status</p> <input type="text" value="Open"/>
<p>Website</p> <input type="text" value="Website"/>	<p>Street *</p> <input type="text" value="Street"/>	<p>PostCode *</p> <input type="text" value="Postcode"/>
<p>Phone*</p> <input type="text" value="+91-123-456-7890"/>	<p>City *</p> <input type="text" value="City"/>	<p>State *</p> <input type="text" value="State"/>
<p>Email Address*</p> <input type="text" value="Email"/>	<p>Country *</p> <input type="text" value="--Country--"/>	<p>Tags</p> <input type="text" value="add a tag"/>
<p>Leads*</p> <input type="text" value="-----"/>	<p>Contacts*</p> <input type="text" value=""/>	<p>Attachment</p> <input type="button" value="Choose File"/> No file chosen


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

<p>NAME</p> <input type="text" value="First Name"/>	<p>CITY</p> <input type="text" value="City"/>	<p>Assigned Users</p> <input type="text" value=""/>
--	--	--

Contacts - 2 



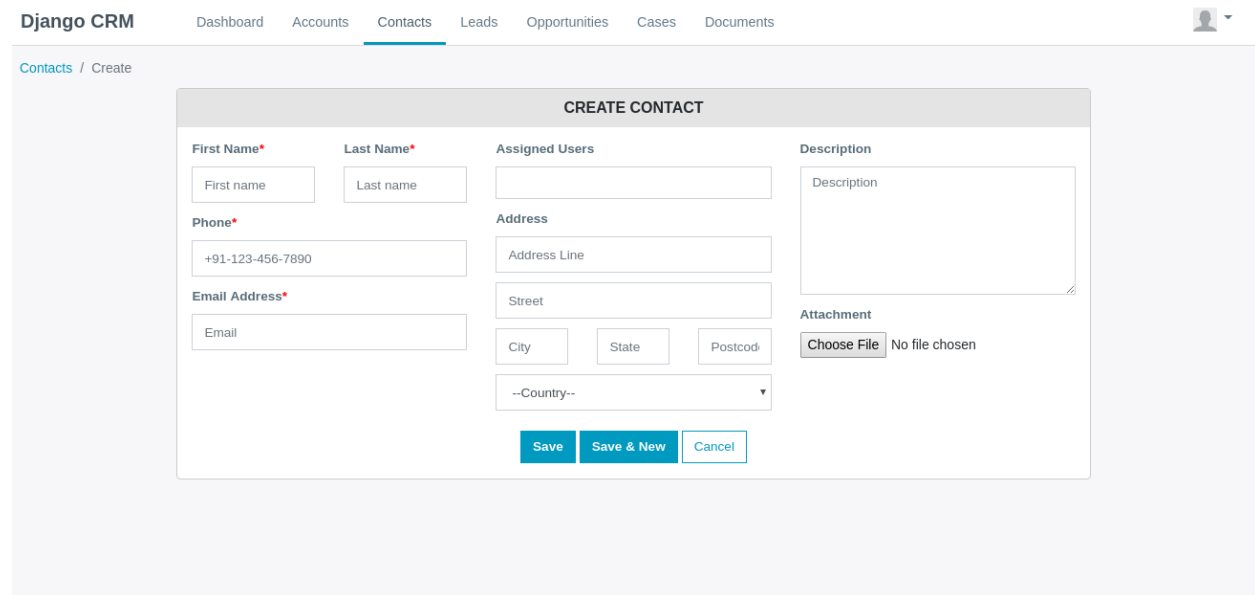
S.no	Name	Assigned User	City	State	Actions
1					<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2					<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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 shows the Django CRM interface with the 'CREATE CONTACT' form. The navigation bar includes 'Dashboard', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Cases', and 'Documents'. The breadcrumb trail is 'Contacts / Create'. The form fields are as follows:

Field	Value
First Name*	First name
Last Name*	Last name
Assigned Users	
Phone*	+91-123-456-7890
Email Address*	Email
Description	Description
Attachment	Choose File No file chosen
Address Line	
Street	
City	
State	
Postcode	
--Country--	

Buttons: Save, Save & New, Cancel

Fig Contacts Create Page

Note: Fields having * are mandatory.

Note: To create a contacts lead is required.

3.2.3 Leads

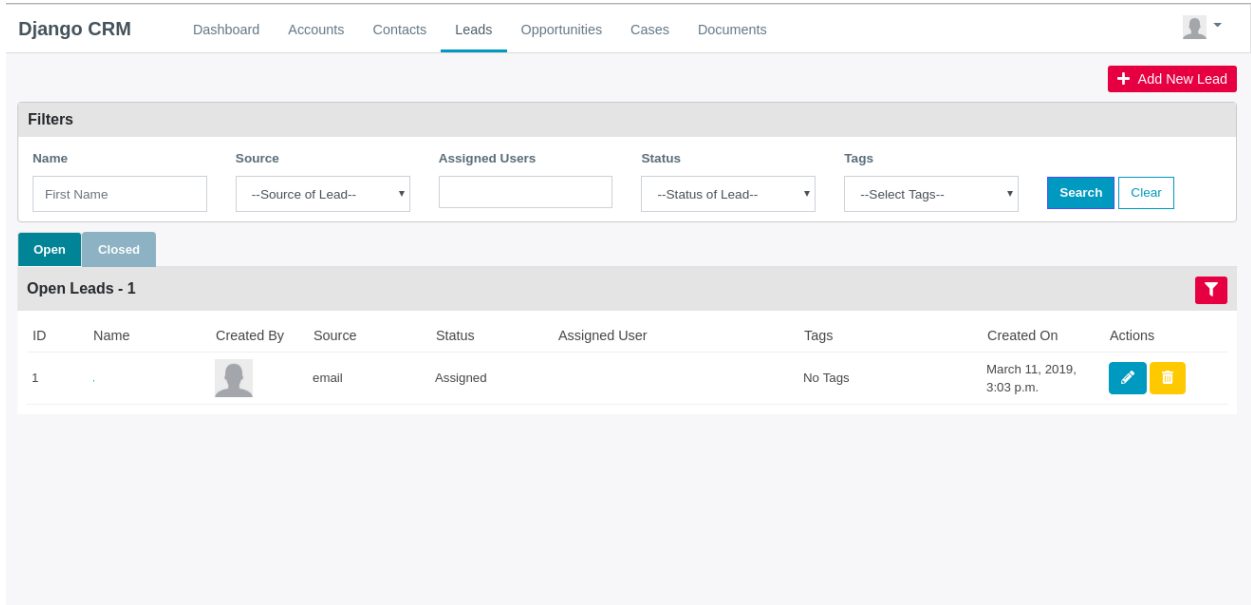


Fig Accounts Home Page

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

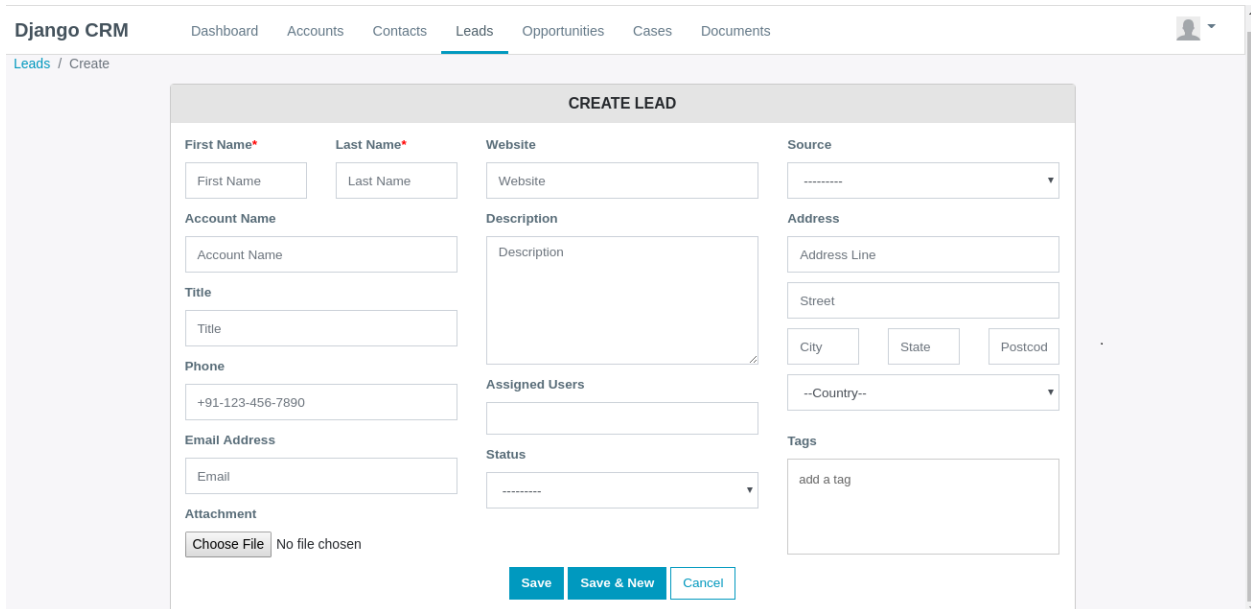


Fig Leads Create Page

Note: Fields having * are mandatory

3.2.4 Opportunity

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

The screenshot displays the Django CRM interface for the 'Opportunities' module. At the top, there is a navigation bar with the following items: 'Django CRM', 'Dashboard', 'Accounts', 'Contacts', 'Leads', 'Opportunities' (which is the active page), 'Cases', and 'Documents'. On the far right of the navigation bar is a user profile icon. Below the navigation bar, there is a red button labeled '+ Add New Opportunity'. The main content area is titled 'Filters' and contains four input fields: 'Name', 'Account', 'Stage', and 'Lead Source'. Each field has a placeholder text 'Name', '.....', '.....', and '.....' respectively. To the right of these fields are two buttons: 'Search' and 'Clear'. Below the filters, there is a section titled 'Opportunities - 0' with a red icon on the right. The main content area below this section displays the message '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

Fig Opportunity Create Page

Note: Fields having * 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

The screenshot shows the 'CREATE CASE' form in the Django CRM interface. The form is titled 'CREATE CASE' and is located within the 'Cases / Create' section. The form contains several input fields: 'Name*' (text), 'Close Date*' (text), 'Contacts' (text), 'Status*' (dropdown), 'Assigned Users' (text), 'Description' (text area), 'Priority*' (dropdown), 'Account' (dropdown), and 'Type of Case' (dropdown). There is also an 'Attachment' section with a 'Choose File' button and 'No file chosen' text. At the bottom, there 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

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 * 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"