

# Customers Database Project

---

## Description

The software's main purpose is to provide the tools to manage a list of Customers. The software must provide a multi-user access to data (each user must be able to operate over data independently from other users) and allow to list all available records and filter/sort them according to several parameters.

It must be possible to edit every detail for each record, add or delete a single record in any moment. We also need to create a Campaign management area, where we'll be able to create a campaign (newsletters, telephone marketing or add a new type of campaign) and assign every single customer to all the campaigns we want. Another important feature we require is a Calendar which must display the scheduled activities for the next 7 days. It's important that this Calendar shows an alert to the user (with the main details for the activity: Customer, Campaign, Notes, deadline) on the deadline the user set for it.

## Technical details

The software must be developed in PHP5 using MySQL as database. For the management of alerts and data checking, we think it'll be necessary the use of JQUERY or an equal Javascript library.

In case of a software developed in English, it should be possible for us to write the Italian translations for all the labels and the messages to be shown to users.

## Features

### Multi-user access to the software

This software involves several users which must have access to the data management. It's required the presence of an "Admin" user which can manage the list of the other users who participate the activities (add new user or suspend/delete one from all activities, change passwords). Before the access to data, every user is required to login to the software. Every user is allowed to see the changes to data performed by the other users, and each change must be recorded along with the name of the user who performed it.

### Calendar - Landing Page

After a successful login, the user must be prompted with the Calendar which collects the activities for the following 7 days (or, if needed, the user must be able to freely browse the Calendar). From each Campaign the user must be allowed to set an alert for any of the Customers; this activity will be displayed on the Calendar and, according with the deadline set by the user, an alert must be shown to the user with the activity details (Customer Name, Campaign, Notes). A user must be able to assign, if needed, the activity to another enabled user.

### Customer data import

It must be possible to import customer data from a .csv file. The file structure is the following

- Cliente
- Indirizzo
- Città
- Centrale Telecom

- Provincia
- CAP
- Referente
- Telefono
- Email
- Web
- Note
- Appuntamento
- Campagna
- Settore Merceologico
- Point o Venditore

In the software's database, this list of fields could be integrated with other fields like

- Active
- Deleted

It's important that it'll be kept track of any editing on the data contained in this table (date, performed by the user, previous value).

If possible, it'd be good to allow the creation of new fields in the database (for instance, a new descriptive field for the contacts which is not available in the list we've just provided).

### Customers List

A list of all the available customers, which must be sortable alphabetically or numerically (both ascending and descending).

The list must also be filterable according to the parameters:

- Cliente
- Città
- Centrale Telecom
- Provincia
- Appuntamento
- Campagna
- Settore Merceologico
- Point o Venditore

It must be possible to perform a single action to a multiple number of records (for instance, set a list of customers to Disabled).

It must be kept track of this change (user who performed the edit, date, previous value) and shown in the Customer's Revisions list.

### Insert single new Customers

Insert a single new Customer into the database. The only mandatory data will be

- Cliente

This operation must be recorded in the database (user who performed the insert, date)

### Edit single Customer

By selecting a customer from the list, it must be possible to access a detailed view of the user data. From this form, it'll be possible to edit available data or insert data in a blank field. From this mask, it'll be available the list of all the revisions (data creation/edit date, user which performed the operation, previous value). These revisions must be listed in a descendent date of performing order. It must be available the "Delete Customer" button. From this mask, it must be possible to set up an alert for an activity related to the customer (specifying the Name of the customer, the campaign, deadline, notes, the user to whom the alert will be displayed).

### Campaign Management Area

Through this area, users must be able to create a list of campaigns (email marketing, telephone marketing or add a new type of campaign). The landing page must show the list of all the available campaigns, which at first can be ordered alphabetically by name.

The data shown for the Campaigns list should be:

- Campagna (campaign's name)
- Referente (the campaign can be related to a specific brand, for instance Microsoft)
- Tipo Campagna (campaign type: email, telephone etc etc)
- Data Inizio (when the campaign begins)
- Scadenza (deadline)
- Stato (active/suspended)
- Ultima Azione Svolta (last action/edit performed)

This view should be filtered/ordered by:

- Campagna (sort only)
- Referente
- Tipo Campagna
- Stato
- Data Inizio (sort only)
- Scadenza (sort only)
- Ultima azione Svolta (sort only)

Users must be able to select a campaign from this list and access the Campaign detailed view; furthermore users must be able to create a new Campaign or perform a single action to multiple records (activate/suspend a list of campaigns, delete). When a user clicks a Campaign name, he must access the list of all customers designated to that Campaign.

By clicking on an existing Campaign name, on top of the following page users should be able to read a brief resume of the Campaign (Campaign name, Referente, Campaign Type, Date of Creation).

Below that, the data to be shown in the list is:

- Cliente (Customer)
- Point o Venditore

- Ultimo Contatto da (last user of the software who performed an action for this Customer: call, email)
- Data Contatto (Contact date)
- Esito (result of the action performed)
- Prossima Azione (next action to do)

This list should be sorted through all the available fields.

In case of an email marketing Campaign, it should be possible to set at once, for multiple records, the value for the fields:

- Ultimo Contatto da
- Data Contatto
- Esito

In this case, the fields can be filled with the values

- Ultimo contatto da: one of the software registered users
- Data contatto: a date
- Esito: the value "Email Inviata"

Each Customer name in the list should be clickable and lead to a new page, where the customer details are shown. The details to be shown are:

- Cliente (Customer's name)
- Ultimo Contatto da (User who performed the call/ sent the email) (editable)
- Data Contatto (last time he was called/he was sent an email) (editable)
- Esito (editable)
  - In case of Telephone Marketing
    - Interessato
    - Non Interessato
    - Nessuna Risposta
    - Numero Inesistente
    - Rifiuta Contatto
    - Numero Errato
  - In case of Email Marketing
    - Email Spedita
    - Email non Spedita
- Prossima azione (editable)
  - In case of Telephone Marketing
    - Richiamare
    - Non Richiamare
  - In case of Email Marketing
    - Invia email
    - Non inviare email
- Note (editable)
- Revisioni (a list of all the revisions on this record)

When creating a new Campaign, the user should compile a form where this data is available:

- Campagna (Campaign's name)
- Tipo Campagna (Campaign type)
- Data di inizio (Starting date)
- Scadenza (Deadline)
- Note
- Creata da (user who created the Campaign)
- Referente (a list of brands from which a user can select, or add a new one)
- Destinatari (the user must be allowed to select the Customers which will be the target for this campaign, from all the Customers available in the database. The available customers list must be sortable/filterable like in the main Customers view and allow multiple selection).