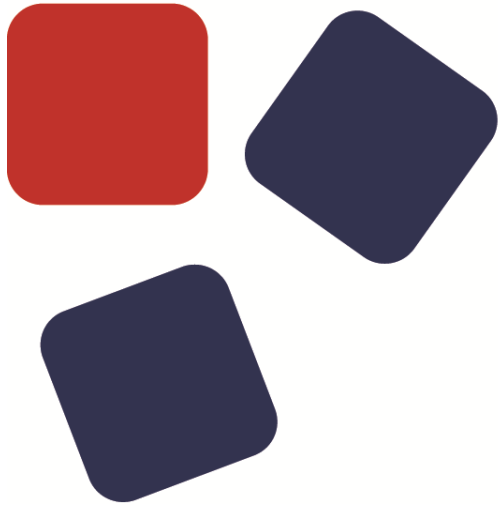




# WebRatio Platform Modeler Laboratory



# WEBRATIO PLATFORM MODELER LABORATORY

REV.03

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## INTRODUCTION

In this laboratory, you will make an Application for the registration and control of the your company's customers. This Application (named CRM - Customer Relationship Management) will be used to build a registry of client companies. It will contain the employees that you have within the company and the responsible sales managers. You will create a history of the purchases made by customers and of the events organized by sales managers.

## THE DATA

The Application will use a database designed specifically to allow the rescue and retrieval of the necessary data. The Application will contain the information of all client companies and their known. A company is characterized by its name, VAT code, address, phone number, logo, and country. For each company, multiple employees can be registered, and you will need the first name, last name, telephone number, and role within the company.

For each company you can record all purchases, with the date on which they were made, and some related notes. Details about each purchase will be stored, specifically information about the product and the quantity purchased. All products on sale will be also registered, with the name, description, and price.

Products belong to a specific category. The sales managers are particular users (they have all the characteristics of a common user); they also have a telephone number and they are distinguished as being either internal or external sales managers. The sales managers can organize events with multiple employees. These events indicate type of event (phone calls, meetings, etc.), title, event description, and the date. The events are connected to the employee information of the participants and sales managers (organizers).

In addition to the above, the following information will be added:

- The relationship between sales managers and the company;
- The Company information will include the last name of the assigned Sales Manager;
- For each employee, the Employee page will show the full name with the first name and last name separated by a space;
- Each event will have "number of participants" data showing the number of employee participants at the event;

- Any purchase item will include the name of the product (to which it is connected);
- Any purchase item will show the partial amount, calculated as quantity multiplied by the product price;
- Each purchase report will show the total amount: the sum of the partial amounts;
- Companies with the Italian nationality will be identified separately as Italian companies;
- Companies whose sum of purchase costs is greater than one million will be identified as best customers;
- The sales managers will have additional "number of employees" information, showing the number of followed employees;
- Each company will be connected to events that at least one of its employees will attend.

## USERS

The application will use the following user roles, with the following features:

- **Administrative Officer:** Records the purchases made by client companies. Can search companies and view their purchases; add new, delete, or change purchases.
- **Sales Manager:** Indicates the relationship with the companies. Can find and view the companies within his area of responsibility and the purchases made by those companies. Can also search, view, create, and edit events. Finally, can add new companies and new employees, and modify or delete this data.
- **Administrator:** The user with greatest freedom of action. Able to search, view, insert, edit, and delete companies, employees, and events. Manages the product list and can find, view, insert, modify, and delete products. Can also assign the companies to sales managers.



# FUNCTIONALITIES

## Company Search

The user can search for one or several companies using one or more attributes (name, VAT code, address, phone number, country, or sales manager reference). The user can select one of the retrieved results and see the company details on a specific page. The company details contain the company info and the full list of the company's purchases.

## Company Management

The user inserts all data related to the new company and saves the data in the application. In this case the company name, VAT number, address, phone number, country and sales manager are required. The user will modify the company after selecting a particular company from a special list where it is possible to modify one or more data item. A company can also be deleted.

## Employee Search

The user can search one or multiple employees with one or more attributes (name, surname, phone number, role in company, company). The user can select one of the retrieved results and see the employee details in an opening dialog.

## Employee Management

The user can create a new employee, insert all data about a new employee, and save the data in the application. Each new employee will require the name, phone number, and the company reference. The user can edit the employee, or modify one or more data item after selecting a employee from a specific list. A employee can have several phone numbers. It must be possible to add many phone numbers to the same employee. A employee can be deleted.

## Sales Manager Organizer

The sales manager must have a calendar in which he can schedule events involving employees of the companies he manages.

## Product Catalog

The sales manager can see in a specific page the product catalog with a hierarchical list of categories and their corresponding products.

## Purchase Order Management

The sales manager can create a purchase order specifying several order lines. In each order line, the user can select the purchased product and quantity. The number of order lines can be unlimited. The total amount of the purchase order must be automatically calculated by the web application.

## Access Rights

The login functionality is required for each user, who is identified by username and password and who has access to features related to their role.

## User Profile

Every page shows welcome message to the user. From this section the user can see his/her profile information and he can also logout from the Web application.

## Sales Managers Weekly Report

Sales managers must receive a weekly report by email containing the list of their last-closed purchases.

**Graphics:** No requirement for the application style graphics.

**Deadline:** End of course.

**Estimate:** 5 days

**Constraints:** No special constraints.

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