



BASIC CRM APP

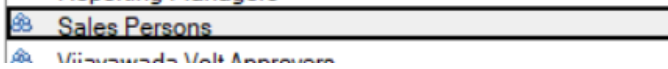
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APPLICATION SETUP

1 NAB Groups

Create the following group in Domino NAB and add applicable into the group.

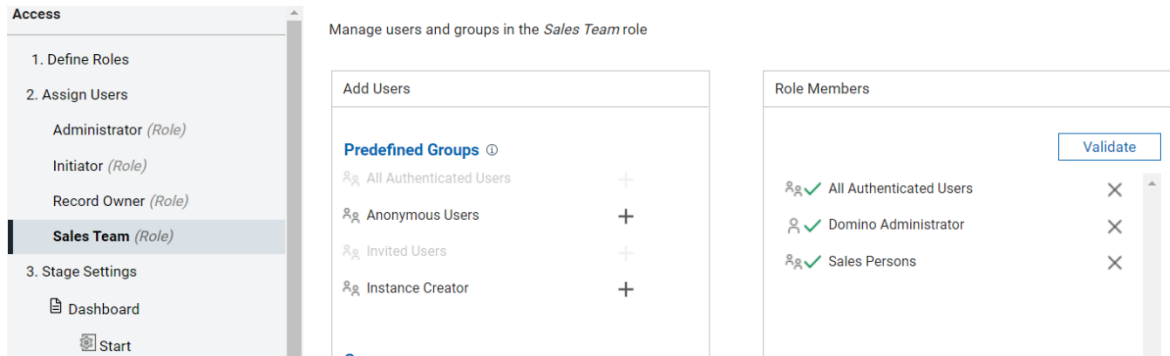


2 Import Application

Import the application in your environment and uncheck the “Remove previously defined users and groups from this application” option to maintain the assigned roles.

Application Roles:

- Administrator
- Sales Team (Sales Person)



APPLICATION DESIGN

1 Dashboard

1.1 Dashboard Page

The graphical representation of the opportunities and sales are shown in this page

This contains the number of new and open opportunities, monthly and yearly sales in form of graphs.

1.2 Contacts Page

This page contains the list of customer contacts.

New customer contact can be added by clicking on the New button.

We can edit the existing customer contact by selecting the contact from the list and clicking on the edit button.

Deletion of the contact can be done by selecting and clicking on Delete button.

1.3 Opportunities Page

This page contains the list of existing opportunities in form of tabular as well as Kanban view.

We can Add, Edit and delete the opportunity by clicking on respective buttons.

1.4 Reports Page

This page contains the list of opportunities from which we can select any opportunity and generate report of it by selecting and clicking on the generate report button.

2. Opportunities View (Master Form)

2.1. Opportunitites Master

This is the master form for Opportunities and is used to store all the details of the opportunities.

This communicates with the Opportunity Page in the Dashboard Form to perform CRUD operations.

3. Customer Contacts (Master Form)

3.1. Customer Contacts Master

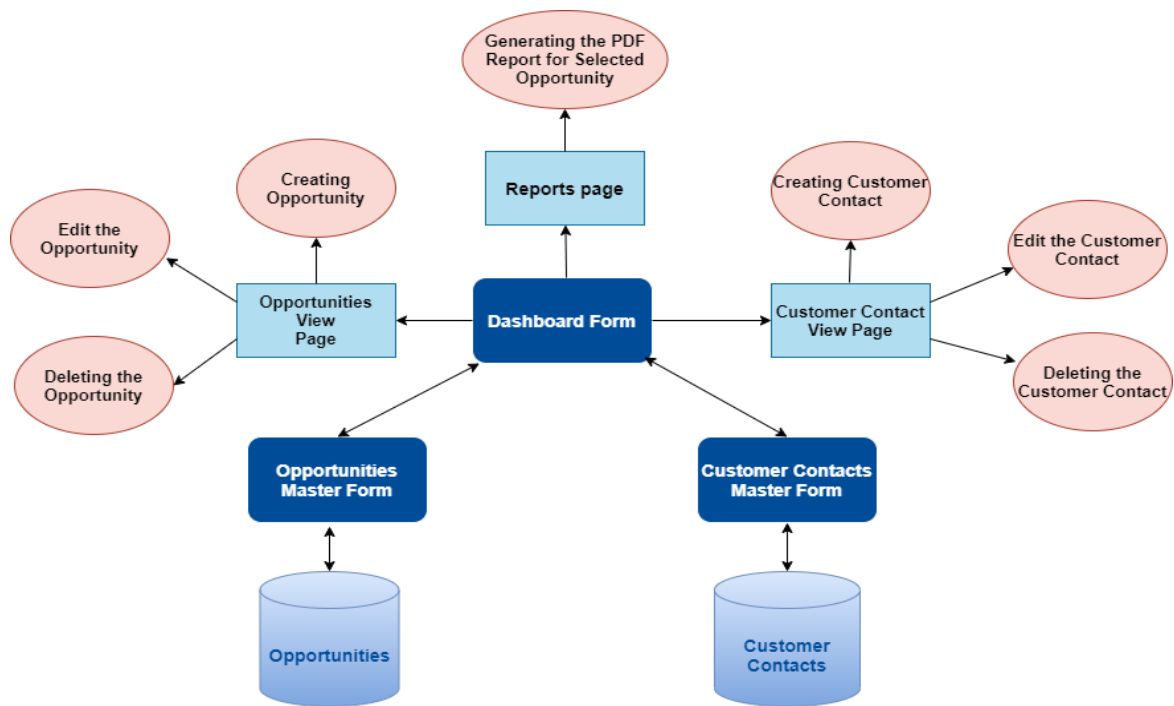
This is the master form for Customer Contacts and is used to store all the details of the customer contacts.

This communicates with the Contacts Page in the Dashboard Form to perform CRUD operations.

Application Workflow

4. Dashboard

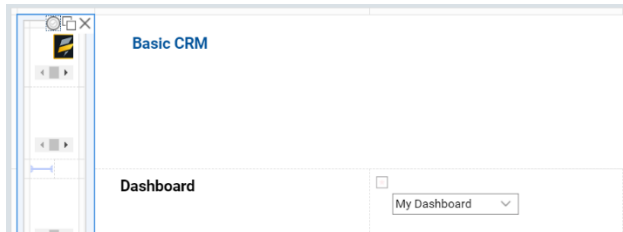
- This is the only form that is used by the user to perform any action in the entire application.
- The dashboard form contains the 4 pages which are dashboard page, Opportunities page, contacts page and reports page.
- Any action can be done with in this form itself.
- Initially the opportunities are created from the opportunities page and contacts are created from the contacts' page.
- Based on the stage of the opportunity it is shown under the respective stage of in the Kanban view.
- Once the opportunities and contacts are added we can edit and delete them accordingly.
- In the reports page we can select the opportunity and generate a pdf report of it.



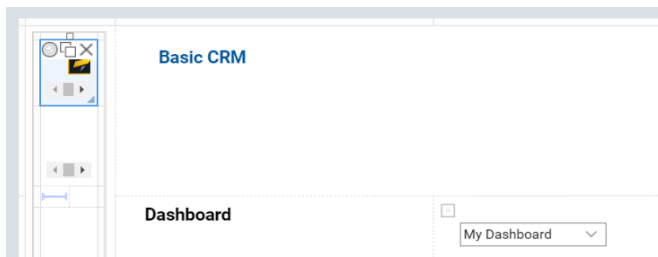
CHANGING THE LOGO

Edit the application and open every page. Follow the steps below to apply the logo of your choice:

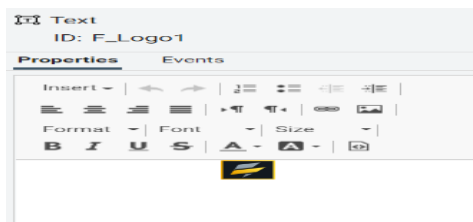
- Go to the side-nav section of the page. The highlighted section in the below image.



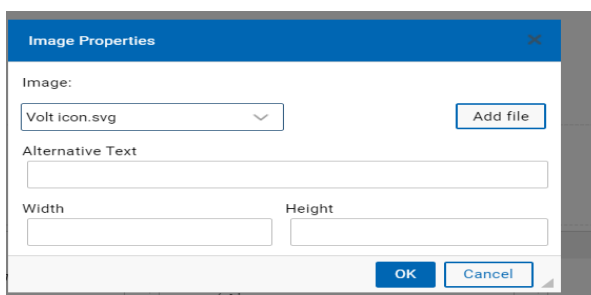
- In the side-nav section, click the first textbox with the default company logo as shown in the below image.



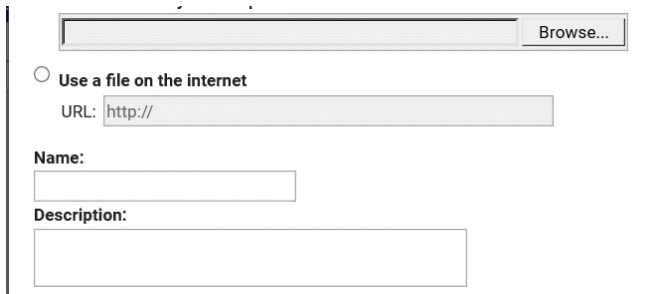
- Upon clicking the text box, the properties will be opened in the right side section shown below



- Remove the existing default logo and add your customized logo in it.
- To add new logo, click on the **image icon** on the top right which contains image properties.

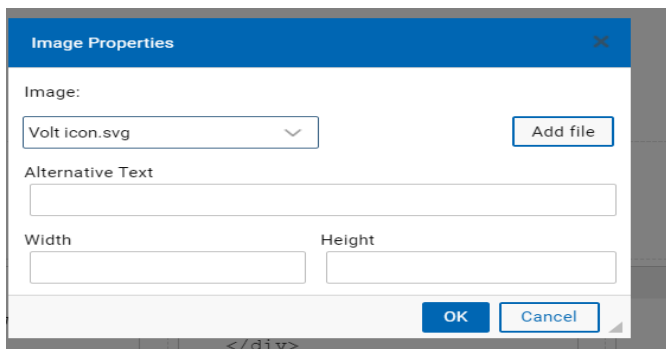


Select the image from the existing images or add new image from outside the application using the **Add file button**. A dialogue box will be opened as shown below



A screenshot of a file selection dialog box. At the top, there is a text input field with a "Browse..." button to its right. Below this, there is a radio button labeled "Use a file on the internet". Underneath the radio button is a "URL:" label followed by a text input field containing "http://". Below the URL field are two more text input fields: one labeled "Name:" and one labeled "Description:".

- Give the name and description and click on **OK**. Now the image is added to your volt application.
- Add the logo with the custom width and height as shown below.



A screenshot of the "Image Properties" dialog box. The title bar is blue and contains the text "Image Properties" and a close button. The main area has a label "Image:" above a dropdown menu showing "Volt icon.svg" and a blue "Add file" button. Below this is a label "Alternative Text" above a text input field. Further down are two text input fields labeled "Width" and "Height". At the bottom right are two buttons: "OK" (blue) and "Cancel" (white with blue border). The dialog box is overlaid on a grey background with a code editor snippet showing "</div>" at the bottom.

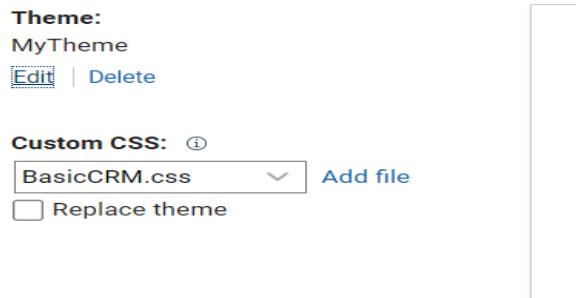
- Click on **APPLY** and **OK** to apply the changes made and to set the new logo.

MODIFYING CSS

You can add your custom stylesheets using the instructions given here

https://help.hcltechsw.com/domino_volt/1.0/ex_css_toc.html

The CSS used in this application is named 'NewCustomCSS.css' and it can be further modified as needed.



1 CSS Sections

- Button Customization
 - Default buttons like Submit, Next, Back and Custom buttons CSS properties are given in this section.
- Sections
 - The properties of sections in the application can be controlled from here.
- Kanban View
 - Kanban view in the application CSS is controlled here.
- Text box
 - The text boxes width, height, padding and the text headings size, font etc. are specified here.
- Custome Dropdown boxes
 - The dropdown boxes width, height, padding and the text headings size, font etc. are specified here.
- Sidenav
 - The customization of the side nav bar like background colour is given here.
- Table
 - Table colour, alternative rows colour, column headings etc. are customized here.