Objectives

Assume you work for ACME, Inc. and are tasked to build an in-house CRM tool for the sales team to track their sales pipeline.

A CRM stands for Customer Relationship Management. CRM software is used by many businesses in many industries to manage customer data and sales workflow. Popular CRMs include Salesforce.com, SugarCRM, and High Rise.

As a final capstone project for the course, we’ll build a business CRM. Up until now, most of our assignments have had up to two or three models and four or five views. This business CRM will have many more models and views.

In this project we’ll be deploying the site to a real server backed by a real database.

Requirements

- A Business CRM has the following models (as developed in class):

```python
class Stage(models.Model):
    name = models.CharField(max_length = 200)
    order = models.IntegerField(help_text = 'The order this is displayed on the screen')
    description = models.TextField(blank = True, null = True)
    value = models.IntegerField(help_text = 'On a scale of 0 to 100 of the stage of the pipeline')

class Company(models.Model):
    name = models.CharField(max_length = 200)
    website = models.URLField(max_length = 200, blank = True, null = True)
    address1 = models.CharField(max_length = 200, blank = True, null = True)
    address2 = models.CharField(max_length = 200, blank = True, null = True)
    city = models.CharField(max_length = 200, blank = True, null = True)
    state = models.CharField(max_length = 200, blank = True, null = True)
    zipcode = models.CharField(max_length = 200, blank = True, null = True)
    country = models.CharField(max_length = 200, blank = True, null = True)
    phone = models.CharField(max_length = 200, blank = True, null = True)

class Contact(models.Model):
    company = models.ForeignKey(Company, blank = True, null = True)
    first_name = models.CharField(max_length = 200)
    last_name = models.CharField(max_length = 200)
    address1 = models.CharField(max_length = 200, blank = True, null = True)
    address2 = models.CharField(max_length = 200, blank = True, null = True)
    city = models.CharField(max_length = 200, blank = True, null = True)
    state = models.CharField(max_length = 200, blank = True, null = True)
    zipcode = models.CharField(max_length = 200, blank = True, null = True)
    country = models.CharField(max_length = 200, blank = True, null = True)
    phone = models.CharField(max_length = 200, blank = True, null = True)
    email = models.EmailField(max_length = 200, blank = True, null = True)

class Campaign(models.Model):
    name = models.CharField(max_length = 200)
    description = models.TextField(blank = True, null = True)

class Opportunity(models.Model):
    stage = models.ForeignKey(Stage)
    company = models.ForeignKey(Company, blank = True, null = True)
    contact = models.ForeignKey(Contact)
    value = models.FloatField(help_text='How much this opportunity is worth to the organization')
    source = models.ForeignKey(Campaign, help_text='How did this contact find out about us?')
```
class Reminder(models.Model):
    user = models.ForeignKey(User)
    create_date = models.DateTimeField(auto_now_add=True)
    opportunity = models.ForeignKey(Opportunity)
    date = models.DateField()
    note = models.CharField(max_length = 200)
    completed = models.BooleanField(default=False)

class Report(models.Model):
    name = models.CharField(max_length = 200)
    link = models.URLField()

class CallLog(models.Model):
    user = models.ForeignKey(User)
    opportunity = models.ForeignKey(Opportunity)
    date = models.DateTimeField(auto_now_add=True)
    note = models.TextField()

class OpportunityStage(models.Model):
    user = models.ForeignKey(User)
    opportunity = models.ForeignKey(Opportunity)
    stage = models.ForeignKey(Stage)
    timestamp = models.DateTimeField(auto_now_add=True)

Extra Credit Ideas
- Require a login on all views that relate to holding customer data

Hints