Customer Relationship Management (CRM) System
Practical - 1
Software Engineering Lab
Use Case UML Diagram
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What is CRM?

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships to grow your business.

A *CRM system* gives everyone — from **sales, customer service, business development, recruiting, marketing,** or any other line of business — a better way to manage the external interactions and relationships that drive success.

Use case Diagram:
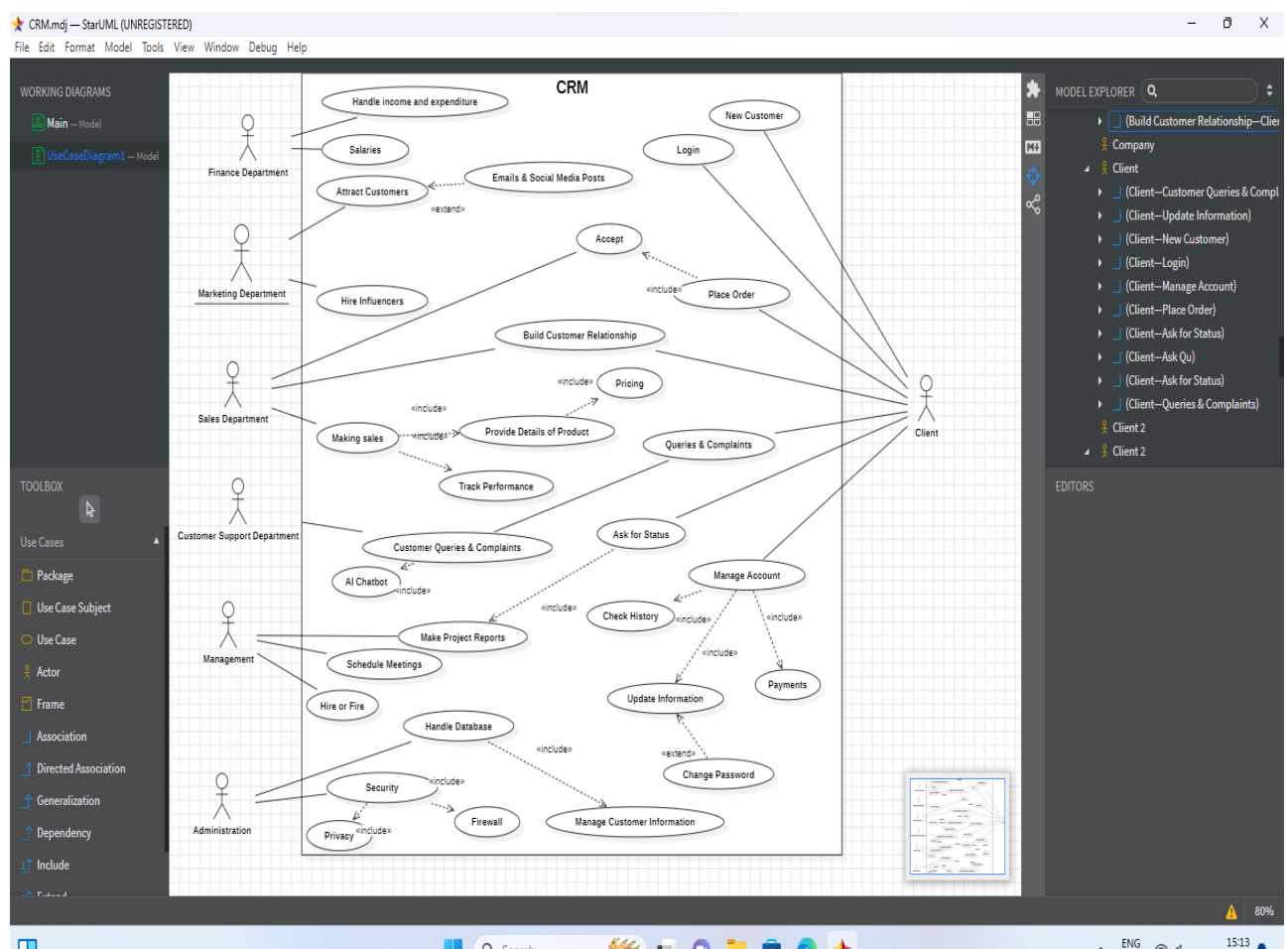
Components of Use Case Diagram:

Actors:

- **Finance Department**
- **Marketing Department**
- **Service Department**
- **Customer Support Department**
- **Management**
- **Administration**
- **Client**

Use Cases:

- **For Finance Department**
  1. **Handle income and expenditure:**
     This department handles all the tasks related to the finances of the company like all the expenditures of the company and tax-related services.
  2. **Salaries**
     It also involves giving out salaries to the employees and staff.
- **For Marketing Department**
  1. **Attract Customers:**
     Extends Emails & Social Media posts. They make attractive posters which attract the customers. Also have offers which customers can avail.
  2. **Hire Influencers:**
     They can hire influencers and give them tasks related to marketing. Nowadays Influencers are in high demand.

- **For Sales Department**
  1. **Build Customer Relationship:**
     This department involves building a good relationship with the clients/customers right from the beginning. This is a crucial task that needs to be done properly and without fail. This is directly connected with the reputation of the company.
  2. **Making Sales:**
     a. This **includes Providing details of the Product** which ultimately **includes** all the **features and Pricing**.
     b. It also **includes Tracking the Performance** of the project.

3. **Accept Order:**

The client places the order and the sales department reviews it and if all the conditions or requirements are met then they **Accept the Order**.

- **Customer Support Department**
    1. **Customer Queries and Complaints:**

    This Department handles queries/complaints of the clients.
    This includes the use of a Chatbot. At the first level, a chatbot interacts with the customers and handles general issues.
    If the customers are unhappy, they can contact customer care and ask queries.

- **Management**
    1. **Hiring/firing of employees**
    2. **Schedule Meetings:**

    They schedule meetings with the client (weekly, monthly, quarterly, half-yearly).

    3. **Make Project Reports:**

    They also help in making Project Reports which can be given to the client when they ask for the project status.

- **Administration**
    1. **Handle Database:**

    This **includes Storing and Managing** all the information of the customers in a database.

    2. **Security:**

    A very important task of the department.
        a. This **includes the Privacy of the customers**. Information about one client should not be visible to other customers. And also information related to one department should not be visible to other departments.
        b. It also **includes a Firewall**. A firewall is a network security device that monitors incoming and outgoing network traffic and decides whether to allow or block specific traffic based on a defined set of security rules.

- **Client**
    1. **Login:**

    Customers can login to the platform to view details and ask queries.

    2. **New Customer:**

    New Customers can make an account on the platform and then interact with the company.

3. **Manage Account:**
    a. This **includes Checking History**. This will show details of previous collaboration with the company also details of the previous products.
    b. **Includes an option to Update Information** like password (**Extends**), or any other information.
    c. **Includes an option to check payments**
4. **Place Order:**
    Clients if happy with the product and pricing then **can place the order**. This **includes accepting orders** from the Sales Department.
5. **Build Customer Relationship:**
    Building a good relationship with the company is important for fostering trust, enhancing customer loyalty, and creating a positive rapport that contributes to long-term satisfaction and mutual benefit.
6. **Queries and Complaints:**
    Clients can ask queries and register any complaints. The Customer Support Department will address these.
7. **Ask for Status:**
    Clients can ask for status of the project and the management department will provide them with project reports.