SIGNET POWER

A PROJECT REPORT
for
Major Project (KCA451)
Session (2023-24)

Submitted by
Ashu Tyagi
2200290140041
Ashutosh Khagwal
2200290140042

Submitted in partial fulfilment of the
Requirements for the Degree of

MASTER OF COMPUTER APPLICATION

Under the Supervision of
Mr. Praveen Kumar Gupta
Assistant Professor

Submitted to

DEPARTMENT OF COMPUTER APPLICATIONS
KIET GROUP OF INSTITUTIONS
Uttar Pradesh-201206
(2023-2024)

CERTIFICATE

Certified that **Ashu Tyagi 2200290140041, Ashutosh Khagwal 2200290140042** has/ have carried out the project work having "**SIGNET POWER**" (**Major Project-KCA451**) for **Master of Computer Application** from Dr A.P.J ABDUL KALAM TECHNICAL UNIVERSITY (AKTU) (formerly UPTU), Lucknow under my supervision. The project report embodies original work, and studies are carried out by the student himself/herself and the contents of the project report do not form the basis for the award of any other degree to the candidate or to anybody else from this or any other University/Institution.

This is to certify that the above statement made by the candidate is correct to the best of my knowledge.

Date:

Ashu Tyagi
Roll No 2200290140041
Ashutosh Khagwal
Roll No 2200290140042

Mr. Praveen Kumar Gupta
Assistant Professor
Department of Computer Applications
KIET Group of Institutions, Ghaziabad

Dr Arun Kumar Tripathi
Head
Department of Computer Applications
KIET Group of Institutions, Ghaziabad

ABSTRACT

This project focuses on the implementation of Salesforce CRM (Customer Relationship Management) for Signet Power, a leading energy solutions provider. The objective is to streamline Signet Power's sales, marketing, and customer service processes, thereby improving operational efficiency and customer engagement. The implementation process includes customizing Salesforce CRM to meet the specific needs of Signet Power, integrating it with existing systems, and training staff to ensure seamless adoption.

Key goals of the project include:

Optimizing Sales Processes: By utilizing Salesforce's robust features, Signet Power aims to automate and enhance sales workflows, manage leads and opportunities more effectively, and gain real-time insights through advanced analytics and reporting tools.

Enhancing Customer Service: The CRM system will enable better management of customer inquiries, support tickets, and service requests, leading to faster response times and higher customer satisfaction. Features like case management and automated follow-ups will be pivotal.

Improving Marketing Campaigns: Salesforce's marketing automation tools will allow Signet Power to design, execute, and analyse targeted marketing campaigns, improving lead generation and conversion rates.

Integrating Systems: The project involves integrating Salesforce CRM with Signet Power's existing ERP and other critical business systems to ensure a unified data environment, facilitating better decision-making and operational continuity.

Staff Training and Adoption: Comprehensive training programs will be conducted to ensure that Signet Power's staff can effectively use the new CRM system. This includes hands-on training sessions, user manuals, and ongoing support to maximize the benefits of Salesforce CRM.

The expected outcomes of the project include increased sales efficiency, improved customer satisfaction, and enhanced overall business performance.

ACKNOWLEDGEMENT

Success in life is never attained single-handedly. My deepest gratitude goes to my project supervisor, **Mr. Praveen Kumar Gupta** for his guidance, help, and encouragement throughout my project work. Their enlightening ideas, comments, and suggestions.

Words are not enough to express my gratitude to **Dr Arun Kumar Tripathi, Professor and Head, Department of Computer Applications**, for his insightful comments and administrative help on various occasions.

Fortunately, I have many understanding friends, who have helped me a lot on many critical conditions.

Finally, my sincere thanks go to my family members and all those who have directly and indirectly provided me with moral support and other kind of help. Without their support, completion of this work would not have been possible in time. They keep my life filled with enjoyment and happiness.

Date:

Ashu Tyagi
Ashutosh Khagwal

DECLARATION

I hereby declare that the work presented in this report entitled “**Signet Power**", was carried out by me. I have not submitted the matter embodied in this report for the award of any other degree or diploma of any other University or Institute.

I have given due credit to the original authors/sources for all the words, ideas, diagrams, graphics, computer programs, experiments, results, that are not my original contribution. I have used quotation marks to identify verbatim sentences and given credit to the original authors/sources.

I affirm that no portion of my work is plagiarized, and the experiments and results reported in the report are not manipulated. In the event of a complaint of plagiarism and the manipulation of the experiments and results, I shall be fully responsible and answerable.

Date:

Ashu Tyagi
Ashutosh Khagwal

TABLE OF CONTENTS

LIST OF FIGURES & TABLES

CHAPTER 1

INTRODUCTION

Customer Relationship Management (CRM) systems have become an essential tool for businesses aiming to streamline their interactions with customers, enhance satisfaction, and drive growth. Salesforce CRM, a leading platform in this domain, offers a robust suite of applications designed to manage customer data, automate sales processes, and foster team collaboration. This report delves into the Salesforce CRM project undertaken to enhance our organization's customer management capabilities.

The primary objective of this project was to implement Salesforce CRM to centralize and optimize our customer-related operations. By leveraging Salesforce's extensive functionalities, we aimed to improve data accuracy, ensure real-time access to customer information, and enhance our sales and service processes. The project encompassed several phases, including requirement analysis, system customization, data migration, user training, and deployment.

Throughout the implementation process, we focused on tailoring Salesforce to meet our specific business needs. This involved customizing modules, workflows, and dashboards to align with our sales strategies and customer service protocols. We also emphasized seamless data integration to ensure that all existing customer data was accurately migrated to the new system without loss or duplication.

In addition to technical implementation, a key component of the project was user adoption. Comprehensive training sessions were conducted to familiarize our staff with Salesforce's features and functionalities, ensuring they could effectively leverage the system to enhance their daily tasks and overall productivity.

This report provides a detailed account of the Salesforce CRM project, covering the methodologies employed, challenges encountered, and the outcomes achieved. It highlights the significant improvements in our customer relationship management processes and offers insights into the benefits realized through the adoption of Salesforce CRM. By sharing our experience, we aim to underscore the strategic value of CRM systems in driving business success and fostering long-term customer relationships.

1.1 PROJECT OBJECTIVE

The primary objective of the Salesforce CRM implementation for the Signet Power project is to enhance the company's customer relationship management capabilities, streamline sales and service operations, and support strategic growth initiatives. The specific goals include:

Centralizing Customer Data: To consolidate all customer information into a single, unified platform, enabling easy access, management, and analysis of customer data.

Improving Data Accuracy and Integrity: To ensure high-quality, accurate, and up-to-date customer information, reducing errors and inconsistencies in customer records.

Enhancing Sales Processes: To automate and optimize sales workflows, from lead generation to deal closure, thereby increasing sales efficiency and effectiveness.

Boosting Customer Service: To provide a comprehensive view of customer interactions, allowing for more personalized and timely customer service and support.

Facilitating Team Collaboration: To improve communication and collaboration among sales, marketing, and service teams, fostering a more cohesive and responsive organizational environment.

Generating Actionable Insights: To leverage Salesforce's analytics and reporting capabilities to gain valuable insights into customer behavior, sales performance, and market trends, supporting data-driven decision-making.

Supporting Scalability and Flexibility: To implement a CRM solution that can grow with Signet Power, accommodating future business expansion and evolving customer needs.

Enhancing Customer Satisfaction and Retention: To improve overall customer experience by providing high-quality, consistent interactions, thereby increasing customer loyalty and retention rates.

By achieving these objectives, the Salesforce CRM implementation aims to position Signet Power as a customer-centric organization, driving sustainable growth and competitive advantage in the energy sector.

1.2 Literature review

- **CRM Systems and Business Efficiency**

CRM systems are designed to improve customer relationships, streamline processes, and increase profitability. According to Buttle (2009), CRM enhances organizational performance by integrating customer information, facilitating better communication, and improving service delivery. The implementation of CRM systems like Salesforce is often associated with significant improvements in sales productivity and customer satisfaction (Chen & Popovich, 2003).

- **Salesforce CRM: Features and Benefits**

Salesforce CRM offers a cloud-based platform with diverse functionalities, including sales automation, customer service management, and advanced analytics. Payne and Frow (2005) highlight the flexibility and scalability of Salesforce, which allows businesses to tailor the system to their specific needs. Salesforce's ability to integrate with other business applications and its user-friendly interface are frequently cited as major advantages (Woodcock, Green, & Starkey, 2011).

- **Impact of Salesforce CRM on Sales Processes**

The automation and optimization of sales processes through Salesforce CRM can lead to enhanced efficiency and effectiveness. Studies by Ahearne et al. (2008) demonstrate that CRM systems can significantly boost sales performance by providing real-time insights, streamlining lead management, and facilitating better forecasting. Salesforce's customizable dashboards and reporting tools allow sales teams to track performance metrics closely and adjust strategies accordingly (Rodriguez & Honeycutt, 2011).

- **Customer Service Improvement through CRM**

Customer service is a critical area where Salesforce CRM can have a profound impact. According to research by Fornell et al. (1996), effective CRM implementation leads to higher levels of customer satisfaction and loyalty. Salesforce provides a 360-degree view of customer interactions, enabling service representatives to deliver personalized and timely support. Additionally, the integration of customer feedback mechanisms within Salesforce can help companies continuously improve their service offerings (Mukerjee & Singh, 2009).

- **CRM in the Energy Sector**

The energy sector presents unique challenges and opportunities for CRM implementation. Zolnowski, Weiß, and Bohmann (2014) argue that CRM systems can help energy companies manage complex customer relationships, regulatory requirements, and market dynamics. Salesforce CRM's adaptability is particularly beneficial in this context, allowing energy companies like Signet Power to tailor the system to their operational needs and customer engagement strategies.

- **Challenges and Best Practices in CRM Implementation**

Despite the numerous benefits, CRM implementation can pose significant challenges, including data migration issues, user adoption hurdles, and integration with existing systems (Rahimi & Berman, 2009). Best practices for successful CRM implementation, as identified by Mendoza et al. (2007), include thorough planning, stakeholder involvement, and continuous training. For the Signet Power project, ensuring seamless data migration and comprehensive user training will be crucial for achieving the desired outcomes.

1.3 Conclusion

The literature underscores the transformative potential of Salesforce CRM in enhancing business efficiency, improving sales processes, and boosting customer service. For Signet Power, the implementation of Salesforce CRM represents a strategic initiative to consolidate customer data, optimize workflows, and drive long-term growth. By leveraging the insights and best practices from existing research, the project can mitigate common challenges and maximize the benefits of the CRM system. This literature review provides a theoretical framework that supports the strategic objectives of the Salesforce CRM implementation at Signet Power, highlighting its anticipated impact on the company's operations and customer relationships.

CHAPTER 2

SOFTWARE REQUIREMENT SPECIFICATION

2.1 Purpose

The Software Requirement Specification (SRS) focuses on the Business Perspective as it contains details of the Business Solution for the Project. It captures functional Requirement for

- Salesforce Implementation, CRM and Digital Platform for Customer, System Administrator,

2.2 Current State of the Business

SIGNET POWER Signet Power very much appreciates your trust and patronage that you have been giving us since long.
Signet Power prides itself as one of the leaders in giving the best technological product to the customer, which are known for their world class quality, offering the complete range of Rittal and giving total solution for Electrical, Electronics, Process control Networking & telecommunication applications.
We have the wide and complete range; most of them ready stock thus giving you prompt delivery and hope that you will be able to meet your requirement as well as requirement of your customer even better.

2.3 Challenges

- Maintain the Prospect/Customer data.
- Complex Sales process.
- Data is available on multiple platforms.
- Follow-up based on dates.

2.4 Focus On

- Avoid duplicate data in the system and keep the data consistency.
- Manage Prospect/Customer Data.
- Reduce the complexity of the sales process.

- Keeping the entire conversation history between the customer & Sales Team.

2.5 Future State of the Business

Signet Power will be using Salesforce in their day-to-day activities.

2.6 Tools and Technology

- Salesforce CRM –Signet Power using Salesforce CRM with Salesforce platform licenses.

2.7 Definitions, Acronyms, and Abbreviations

Acronyms	Description
SFDC	Salesforce.com
CRM	Customer Relationship Management
UAT	User Acceptance Testing
SRS	Software Requirement Specification
SOW	Statement Of Work
Docs	Document
Approx	Approximately

2.8 Functional Requirement

The functional requirement captured into the use cases listed in this document. Integration module discussion is still pending. Integration module will be added after discussion.

CHAPTER 3

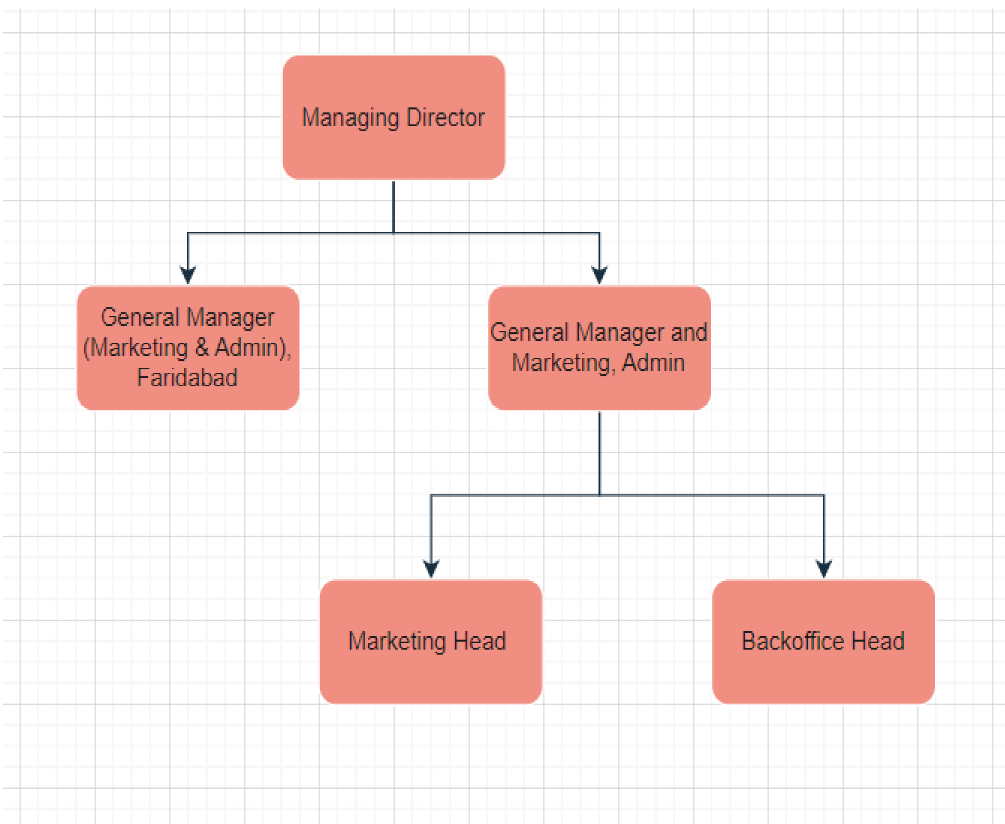
DESIGN OF THE SYSTEM

System design is the solution for the creation of a new system. This phase focuses on the detailed implementation of the feasible system. Its emphasis on translating design. Specifications to performance specification. System design has two phases of development.

- Logical design
- Physical design

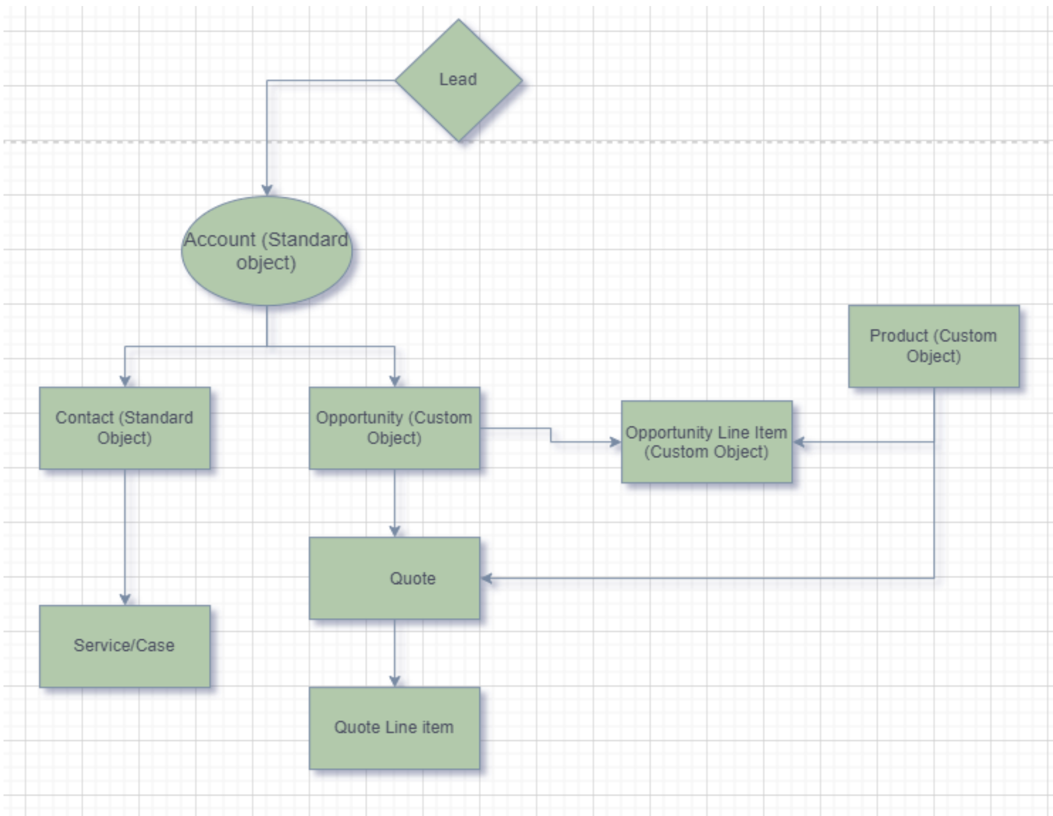
3.1 Organizational Structure

Signet Power Organizational Structure –



3.2 Flow Chart

- This is the sales flow chart which will be followed for further developments.



3.3 Out of scope

- Any point which is not part of this SRS & signed SOW is out of scope.

3.4 Scope Creep

- Ashoka proposal pdf creation.

3.5 Modular Breakdown Structure

This SRS has been created in modular structure as follows.

Module	Use Cases
User Management	UC-001
Lead Management	UC-002, UC-003, UC-004
Account Management	UC-005
Contact Management	UC-006
Opportunity Management	UC-007, UC-009
Product Management	UC-008
Quote Management	UC-010, UC-011
Case Management	UC-012
Activity Management	UC-013
Reports & Dashboard	UC-014

3.5.1 System Use Cases

Use Case	Use Case Name
UC-001	User, Profile, Role Management
UC-002	Lead Management
UC-003	Web to Lead, Insta Pages
UC-004	Lead Conversion
UC-005	Account Management
UC-006	Contact Management
UC-007	Opportunity Management
UC-008	Product Management
UC-009	Opportunity Line item
UC-010	Quote Management
UC-011	Quote line item
UC-012	Case Management
UC-013	Activity Management
UC-014	Reports and Dashboard

3.5.2 User, Profile, Role Management

Use Case ID	UC-001
Use Case Name	User, Profile, Role Management
Actors	System Administrator
Description	Actors should be able to add users and assign them to a role.
Assumption	Users would be configured for all the Salesforce license holders of Signet Power
Pre-Condition	The data model is ready to setup the access permissions
Post-Condition	User should have managed user permission
Normal Flow	The Actor will click on setup and then in a quick find box, Admin will search for Users then click the new user and the form will appear wherethe user needs to fill in the following information to set up a new user record. • First Name • Middle Name • Last Name* • Username • Email ID* • Mobile • Designation • User License • Profile • Active - Checkbox
Notifications	New user will receive an email with a reset password link.
Validations	Username will be unique.
Alternate Flow	N/A
References	N/A

3.5.3 Manual Lead Creation

Use Case ID	UC-002
Use Case Name	Manual Lead Creation
Actors	System Administrator, General Manager, GM(Faridabad), Marketing Head.
Description	Actors will create Enquiry to manage lead.
Assumption	N/A
Pre-Condition	CRM users log into the CRM Application and have the option to create lead Information manually.
Post-Condition	The Lead detail information will be created and saved into the CRM.
Normal Flow	• User click the tab called “Lead”. • User click the button called “New”. • Users will be presented to create Prospect with following fields: • Company Name* • First name/name of owner/MD • Last Name* • Title • Nature Of Business • Email * • Phone • Mobile • Rating • Website • Name of person Releasing order/Payment • Email • Phone • Mobile • TIN/CST, GST • PAN • Proposed payment term • Upper maximum limit • Name and address of sister company, if any – long text area • Address ○ Street ○ City ○ State ○ Country ○ Pin Code • Customer/Lead Source ○ Tender ○ Web to lead

	○ Exhibition ○ Seminar ○ Other • Lead source name – a text field will be given when lead source is any of the above. • Lead Status ○ Open/New ○ Working- Contacted ○ Qualified/ Converted ○ Not Qualified • Lost reason • Qualify reason • Description The field marked with * are required. Note: - • Lead Management ○ New lead will be created into the CRM on lead object. Lead qualification will be decided by user, it means user knows after talking with customer that it needs to be converted into account, contact, opportunity. ○ For Existing customer its account is already created and under it opportunity will be created. • Lead Notification ○ Notification will be sent to senior person when new lead is created for area wise Marketing user. • Activity in salesforce on lead ○ Meeting notes will be created will be created from log a call functionality. Once Meeting comment is written, user should not be able to edit the comments. New comment comes that user will create new log a call activity. • Lead Assignment ○ Assignment of lead will be done manually.
Notifications	N/A
Validations	1. The system will not allow duplicate lead with Mobile and Email.
Alternate Flow	N/A
References	N/A

3.5.4 Web to Lead Capture

Use Case ID	UC-003
Use Case Name	Web to lead capture.
Actors	System Administrator
Description	Lead will be fetched from company website into the CRM.
Assumption	N/A
Pre-Condition	Website must have capability to either Integrate the Web to Lead form or should be able to make API calls to Salesforce CRM.
Post-Condition	Lead automation will be done using Web to Lead form or API Calls.
Normal Flow	• Lead will be created automatically into the CRM once customer enters the required details in Web to lead form. • All the fields Information on website will be captured via Web to Lead. • Web to lead fields are as follows: - • First Name • Last Name • Mobile • Email •
Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.5 Lead Conversion

Use Case ID	UC-004
Use Case Name	Lead Conversion
Actors	System Administrator, General Manager, GM(Faridabad), Marketing Head.
Description	Once lead met the certain criteria will be converted into Account , Contact and Opportunity.
Assumption	Lead can be created manually or via web to lead.
Pre-Condition	User has the access to create and modify the leads
Post-Condition	Lead will be converted into Account and Opportunity for further process.
Normal Flow	1. Once records are created into the CRM. It has to go through certain stages to be qualified for Account and Opportunity. These stages are: ○ Open/New ○ Working- Contacted ○ Qualified/ Converted ○ Not Qualified 2. After the completion of one stage lead will move to the next stage and after completion of all the stages, Lead will be converted into Account, Contact and Opportunity and will be further processed.

Lead	Account	Contact	Opportunity
First Name	First Name	First Name	N/A
Last Name	Last Name	Last Name	N/A
Salutation	N/A	N/A	N/A
Company	Company name	N/A	Opportunity Name
Title	Title	Title	N/A
Phone	Phone	N/A	N/A
Mobile	N/A	Mobile	N/A
Email	Email	Email	N/A
Website	Website	N/A	N/A
Name of person Releasing order/Payment	Name of person Releasing order/Payment	N/A	Name of person Releasing order/Payment
Proposed payment term	Proposed payment term	N/A	Proposed payment term
Upper maximum limit	Upper maximum limit	N/A	Upper maximum limit
GST	GST	N/A	PAN
PAN	PAN	N/A	N/A

	Lead Status	N/A	N/A	N/A
	Rating	Rating	N/A	N/A
	Lead Source	N/A	N/A	N/A
	Status	N/A	N/A	N/A
	Qualified Reason	N/A	N/A	N/A
	Unqualified Reason	N/A	N/A	N/A
	Street	Billing Street	Mailing Street	N/A
	City	Billing City	Mailing City	N/A
	State	Billing State	Mailing State	N/A
	Country	Billing Country	Mailing Country	N/A
	PIN/ZIP	Billing PIN/ZIP	Mailing PIN/ZIP	N/A
	Description	N/A	N/A	N/A
Notifications	N/A			
Validations	N/A			
Alternate Flow	N/A			
References	N/A			

3.5.6 Account Management

Use Case ID	UC-005
Use Case Name	Account Management
Actors	System Administrator, General Manager, GM(Faridabad), Marketing Head.
Description	Actor will be creating Accounts into the system
Assumption	N/A
Pre-Condition	Actor should have permission to create new account
Post-Condition	New account will be created successfully

Normal Flow	• User click the tab called "Account"
	• User click the button called "New"
	• Users will be presented to create Account with following fields. All the standard fields will be used.
	• Account Name
	• PAN
	• TIN/CST, GST
	• Upper maximum limit Proposed payment term.
	• Billing Address
	    ○ Billing Street
	    ○ Billing City
	    ○ Billing State/Province
	    ○ Billing Zip/Postal Code
	    ○ Billing Country
	• Shipping Address
	    ○ Shipping Street
	    ○ Shipping City
	    ○ Shipping State/Province
	    ○ Shipping Zip/Postal Code
	    ○ Shipping Country
	• Phone
	• Website
	• Description
	• Copy billing address to shipping address - checkbox

Notifications	N/A
Validations	A checkbox to copy billing address to shipping address.
Alternate Flow	N/A
References	N/A

3.5.7 Contact Management

Use Case ID	UC-006
Use Case Name	Contact Management
Actors	System Administrator, General Manager, GM(Faridabad), Marketing Head.
Description	Actor will be creating Contact into the system
Assumption	N/A
Pre-Condition	Actor should have permission to create new Contact
Post-Condition	New contact will be created successfully
Normal Flow	• User click the tab called "Contact" • User click the button called "New" • Users will be presented to create Contact with following fields. All the standard fields will be used. ◦ First name ◦ Last name ◦ Title ◦ Account Name ◦ Business Phone ◦ Designation ◦ Mailing State ◦ Mailing Street ◦ Mailing City ◦ Mailing Zip Code ◦ Mailing Country ◦ Mobile ◦ Email ◦ Department ◦ Description-Long text area ◦ Other State/Province ◦ Other Zip/Postal Code ◦ Other Phone ◦ Other Country ◦ Other City ◦ Other Address
Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.8 Opportunity Management

Use Case ID	UC-007
Use Case Name	Opportunity Management
Actors	System Administrator, General Manager, GM(Faridabad), Marketing Head.
Description	Actor will be creating Opportunity into the system
Assumption	Opportunity can be created once lead is converted.
Pre-Condition	Actor should have permission to create new opportunity
Post-Condition	New opportunity will be created successfully
Normal Flow	1. User click the tab called “Opportunity” 2. User click the button called “New” • Name • Account Name • Total Amount • Close Date • Description • Proposed payment term • Upper maximum limit • Owner name • Stage • Opportunity For ○ Signet Power ○ Indra Electricals Control Note - • Opportunity will be created when lead is converted. On opportunity user will have the functionality to add products. • On opportunity Proposal stage, user can create quote and send it to customer.
Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.9 Manage Product

Use Case ID	UC-008
Use Case Name	Create Product
Actors	System administrator, User.
Description	Product will be added under opportunity.
Assumption	Product is present in the system.
Pre-Condition	Opportunity already exists in the system.
Post-Condition	Opportunity Line Item record has been created into the CRM.
Normal Flow	• Product Name / Article • Product Code /HSN Code • Make • Discount • GST • Active • Unit Price • Product Category • Description/Specification • Validity date
Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.10 Create Opportunity Line Item

Use Case ID	UC-009
Use Case Name	Create Opportunity Line Item
Actors	System administrator, User.
Description	Opportunity Line Item will be created after product in added on opportunity.
Assumption	Account already exist in the system and related opportunity
Pre-Condition	Opportunity exists in the system.
Post-Condition	Opportunity Line Item record has been created into the CRM.
Normal Flow	1. User will be able to add line item going into the related section of Opportunity. 2. User can Add products by clicking on the button "Add Products". • Opportunity Line item Name • Opportunity • Product Name • Product Code /HSN Code • Make • Discount % • GST • Quantity • Unit price (Original price of product) • Net unit price (Discounted amount) • Total (Net unit price *qty) • Packaging and forwarding - percent. • GST (Tax) – product wise – 12%,18%,28% • Grand Total (Including GST) • Lead Time – text • Description 3. Discount will come product wise. It will be percentage.
Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.11 Manage Quote

Use Case ID	UC-010
Use Case Name	Create Quote
Actors	System administrator, User
Description	System Admin, user can manually create Quote into the system
Assumption	It will be associated with an Opportunity. So, we can create multiple quotes as per customer requirements.
Pre-Condition	User would have a detail of Opportunity.
Post-Condition	Quote object will be used.
Normal Flow	Quote tab will be provided and user will be presented with the following fields. • Quote Number – auto number format – Noida-2023-2024-01 ○ Similar format for Faridabad(FB), Indra(IEC) • Quote Name • Opportunity Name • Account Name • Expiration date/ Validity • Delivery Status ○ Pending ○ Partially Dispatch ○ Dispatch • Date of quote • Contact Name • Phone • Email • Syncing • Status ○ Draft ○ Needs Review ○ In Review ○ Approved ○ Rejected ○ Presented ○ Accepted ○ Denied • Description • Grand Total • Shipping Address

	• Billing Address Note: - • When quote is created than send reminder should be sent to senior manager and record owner. The send reminder can only be sent when reminder date is filled. • Discount - Product wise discount will be given on each product. Discount will be put in %age. Discount is not fixed for any product. • If sales rep wants to enter discount more than 10%. Show an error that you need to get approval to put discount more than 10 %. • Tax – Product wise tax will be given. Tax field will be given as GST. Tax will come from product directly. Tax percentage for products are 12%, 18%, 28%. • Offer is maintained on quote in Terms and condition section. Which says offer is valid for 1 week, 14 days, 1 month. If customer doesn't close the order than offer expiries and new quotation is send to customer. • Product Price changes - In that time if product price changes than, Signet teams needs to update the price from product masters. Send new quotation after that. Once quote is marked as accepted, it is considered it is accepted by customer and user will manually sync quote and opportunity will be marked as closed won. **Bank Account No., GST, Logo, Company Address is different for Faridabad, Indra and signet. 3 pdfs are managed for it.**
Notifications	Quote get Attached and send email to customer.
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.12 Manage Quote Line Item

Use Case ID	UC-011
Use Case Name	Create Quote Line item
Actors	System administrator, User
Description	N/A
Assumption	It will be associated with quote.
Pre-Condition	Quote will be present in the system.
Post-Condition	Quote line item object will be used.
Normal Flow	Quote tab will be provided, and user will be presented with the following fields. • Line-Item Number • Line-Item Description • Product Name • Product Code /HSN Code • Make • Discount % • GST • Quantity • Unit price (Original price of product) • Net unit price (Discounted amount) • Total (Net unit price *qty) • Packaging and forwarding - percent. • GST (Tax) – product wise – 12%,18%,28% • Grand Total (Including GST) • Lead Time – text • Description Note:- • Discount - Product wise discount will be given on each product. Discount will be put in %age. Discount is not fixed for any product. • If sales rep wants to enter discount more than 10%. Show an error that you need to get approval to put discount more than 10 %. • Tax – Product wise tax will be given. Tax field will be given as GST. Tax will come from product directly. Tax percentage for products are 12%, 18%, 28%.

Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.13 Create Case

Use Case ID	UC-012
Use Case Name	Create Case
Actors	System administrator, GM, Marketing users
Description	Case will be created for complaint.
Assumption	NA
Pre-Condition	User must have the access to Create and Edit records.
Post-Condition	Case record has been created into the CRM.
6+Normal Flow	• User will be created Case manually into the CRM. • Case can be created in three ways:- o Email-to-Case (Routing Address- contact@signetpower.com) o Web-to-Case o Call-to-Case • Once User clicks on "NEW" button from Case tab, System will show following Information: • Case Number- Auto number • Name • Email Address • Phone • Product • Account Name – Lookup • Status * o New o In Progress o Waiting on Customer o Escalated o Closed • Priority* o Critical o High o Medium o Low • Course • Subject* • Contact Phone • Contact Mobile • Contact Email • Escalated* • Date/Time Closed*

	• Date/Time Opened* • Description* • Internal Comments* Note: - • Case will be directly assigned to back-office User Neha (contact@signetpower.com) has the right to assign the case to anyone from her team. • Case escalation after 48 hrs to General manager (Shikhar Tyagi) in case of Signet and Indra than to Managing Director. Case will be done if case status is still open for 48 hrs. If status changes to In progress no escalation will be triggered. • In case of escalation of Faridabad, case will assigned to GM(Faridabad) than escalated to MD. Process will be same as above
Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.14 Manage Activities

Use Case ID	UC-013
Use Case Name	Create Activities
Actors	System Administrator, General Manager, GM(Faridabad), Marketing Head.
Description	User can create task and event with Activity management.
Assumption	N/A
Pre-Condition	User must have the access to Create and Edit activities.
Post-Condition	User will be able to set an activity as per the requirement.
Normal Flow	User can perform the following activity: • Log a call - User will log a call after a record created in the CRM system for further follow-up or client last call communication. It includes. o Subject o Comments o Name • New Task - User will create a new task for task reminder on particular time and salesforce CRM display remind it by reminder window notification on schedule or before time. It includes o Subject o Due Date o Name o Priority o Assigned To o Status • New Event - User will create a new event for event reminder on particular time and salesforce CRM display remind it by reminder window notification on schedule or before time. It includes o Subject o Start Date o End Date o Start Time o End Time o All-Day Event o Name o Description o Location o Purpose (Picklist) • Email - User will be able to send an Email to anyone. It includes o From o To

	• Subject
Notifications	Notification will be sent to the related user.
Validations	N/A
Alternate Flow	N/A
References	N/A

3.5.15 Reports and Dashboard

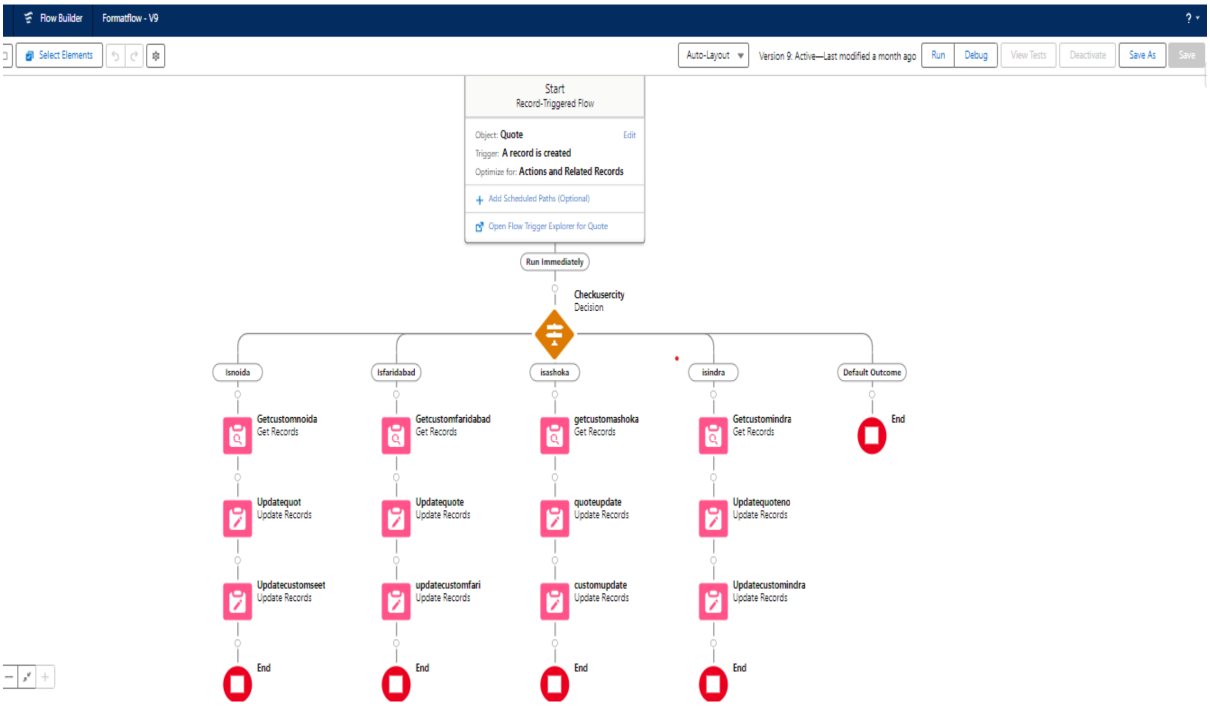
Use Case ID	UC-014
Use Case Name	Report and Dashboard
Actors	System Administrator
Description	A report is a document that presents information in an organized format for a specific A data dashboard is an information management tool that visually tracks, analyses and displays key performance indicator's purpose.
Assumption	The user has access to create reports and dashboards.
Pre-Condition	Data models are ready to create and filter the report data.
Post-Condition	Reports will be created and will be placed into a specified folder which can be shared with any user or user roles. Only 2 Dashboards will be created, one for Administrator and One for rest of the other team.
Normal Flow	The following reports will be generated into the CRM as per the data: To be discussed in detail. • To Dos (Activity) • Standard Dashboard
Notifications	N/A
Validations	N/A
Alternate Flow	N/A
References	N/A

CHAPTER 4

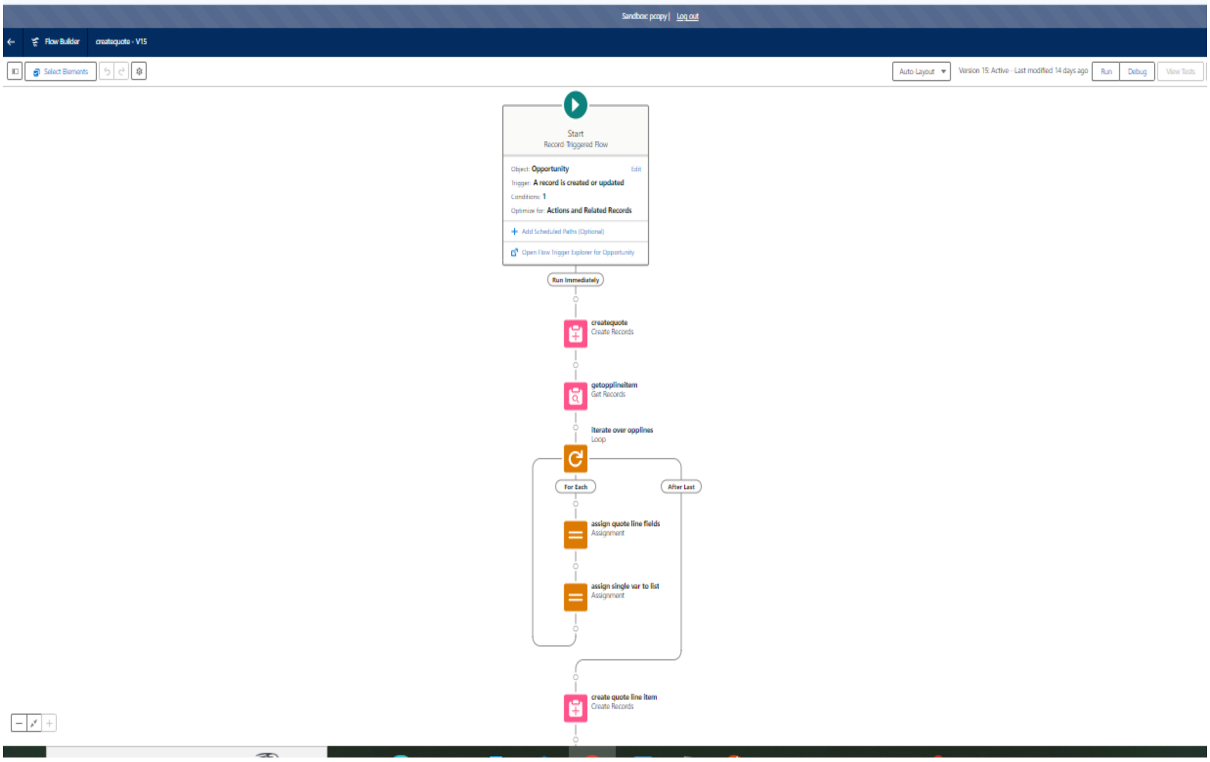
IMPLEMENTATION AND TESTING

Flow used for automation

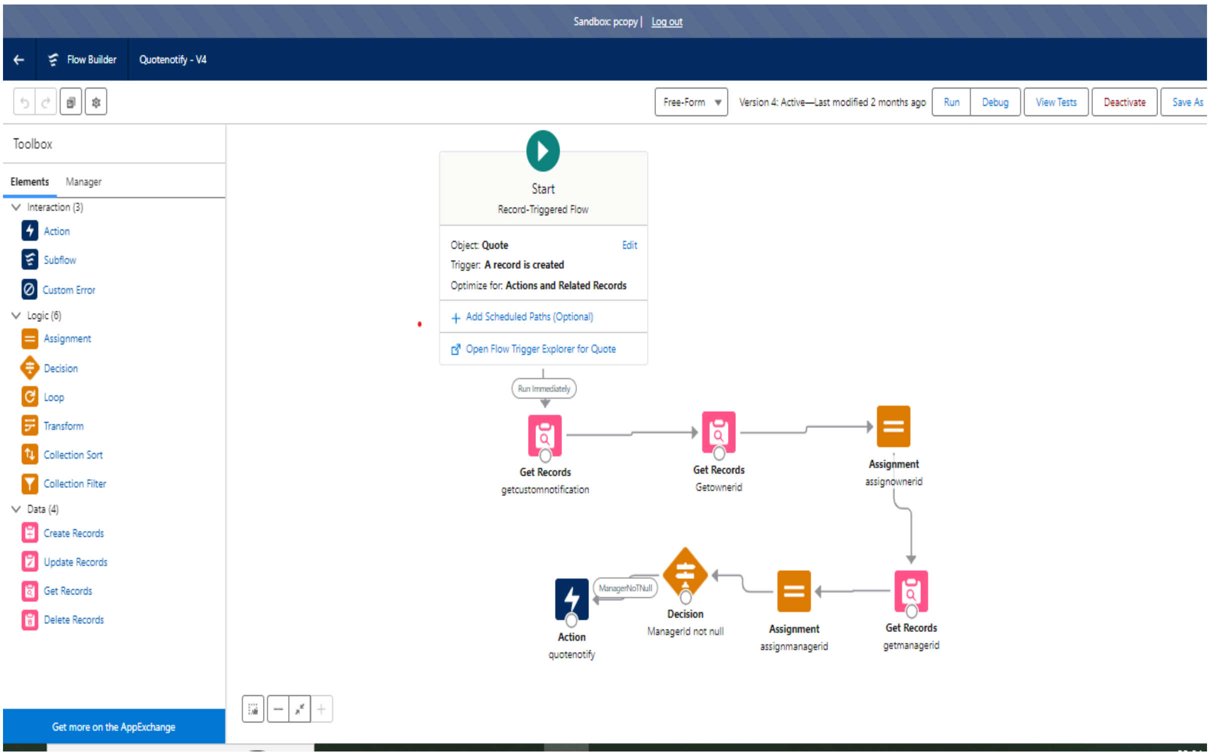
4.1 Flow used in quote to print quote number based on user type



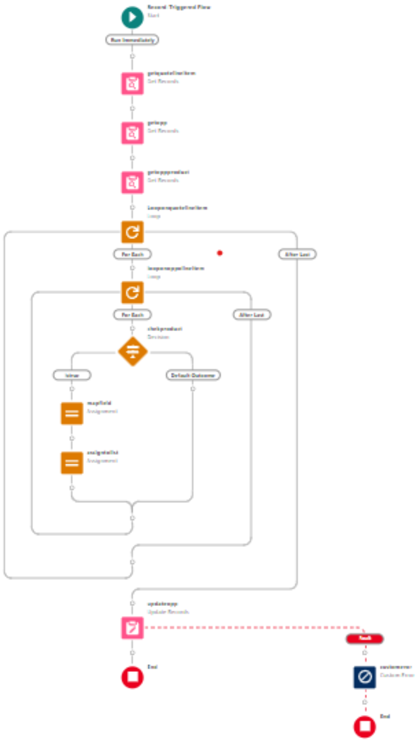
4.2 Used to create quote and quote line item



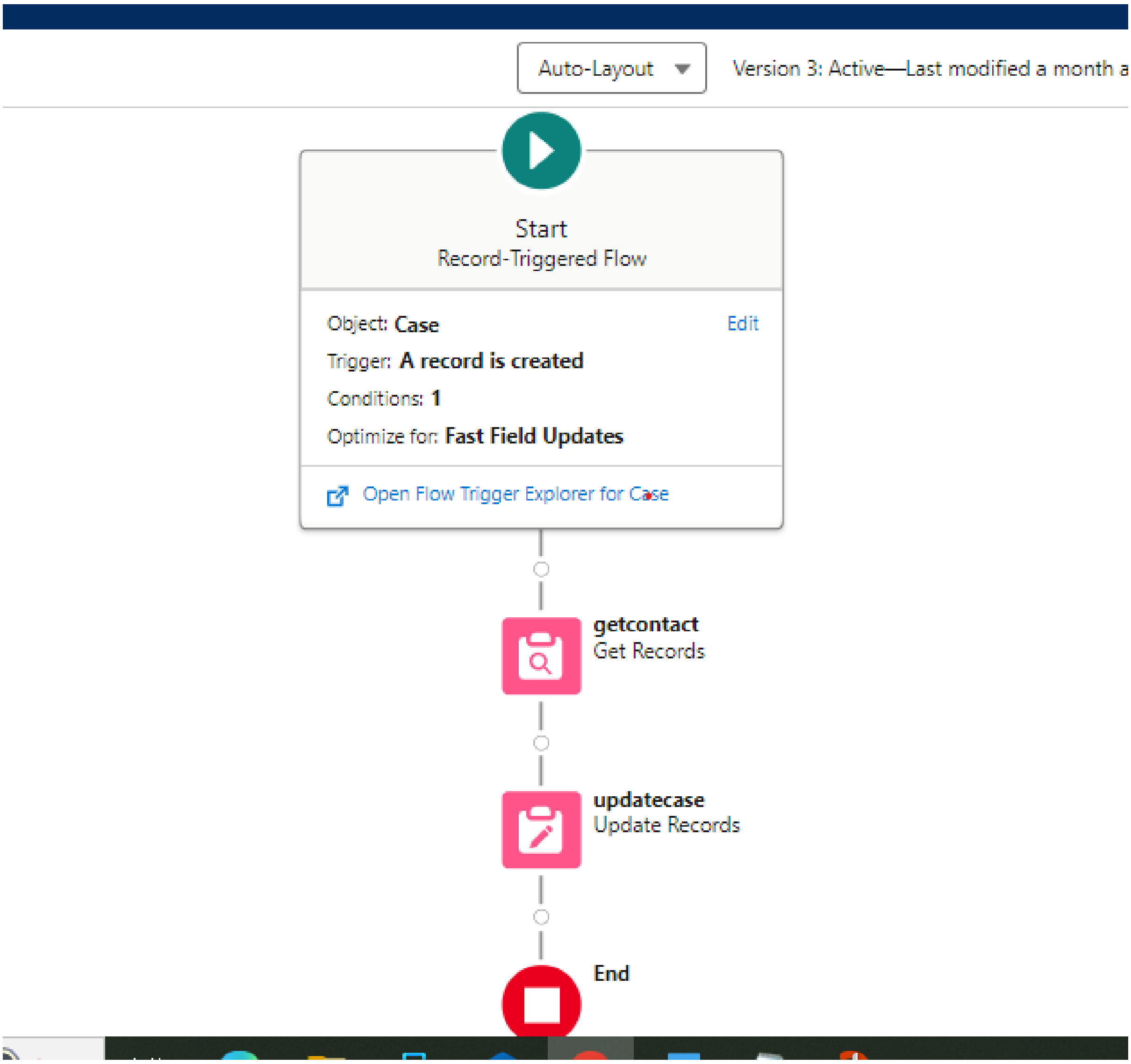
4.3 When quote is created then send notification



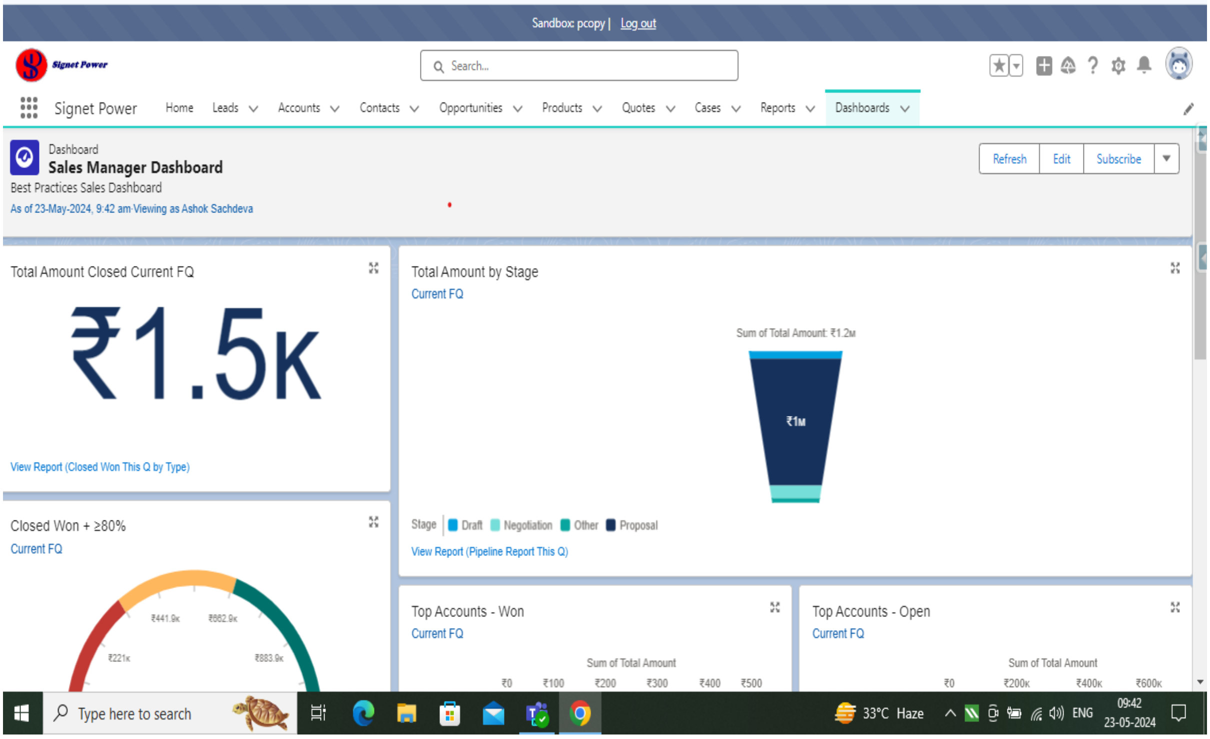
4.4 When quote is sync then update quote line item



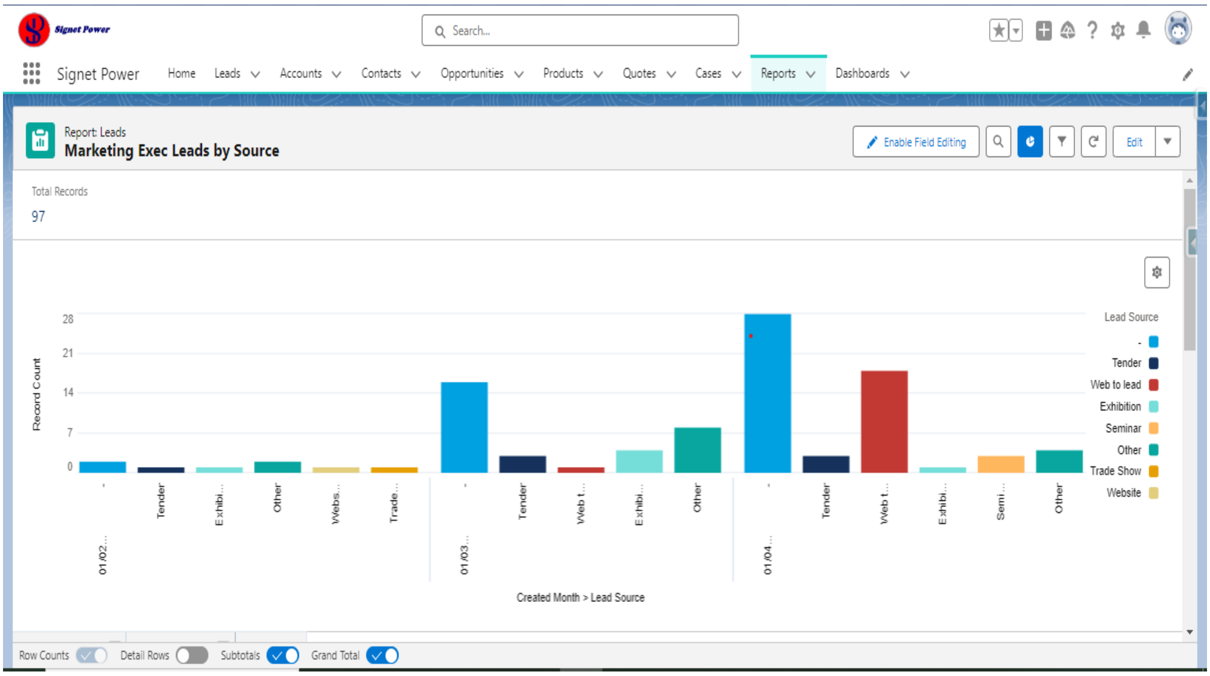
4.5 Used to update case account



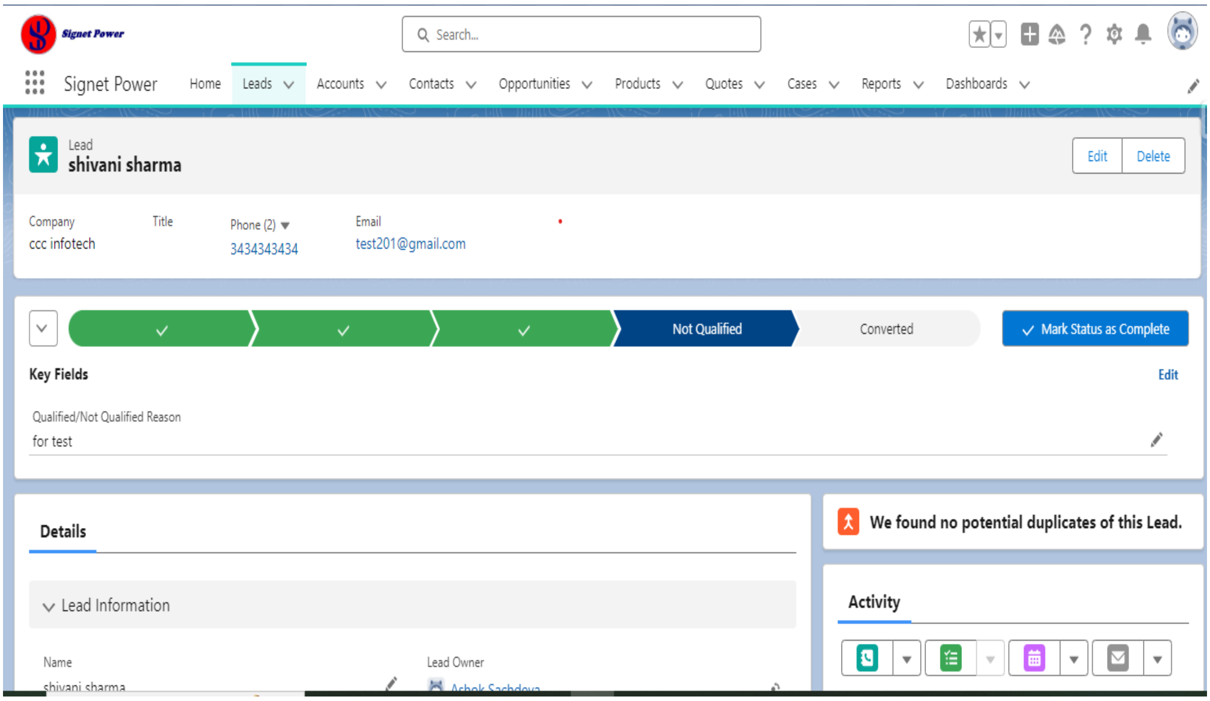
4.6 The dashboard is used to represent the Reports



4.7 These are the reports used to represent the data



4.8 This is the lead record page which manage the lead information



4.9 Testing Approach

Objective: Actors must be able to create manual lead.

Precondition: CRM users log into the CRM Application and have the option to create lead Information manually.

4.9.1 Test Case ID: TC-1

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify if User click on the Leads module

Steps: 1-Click on the app launcher

2-Search for Leads

3-Or directly click on the Lead module

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: None

Actual Results: Same as expected

Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

4.9.2 Test Case ID: TC-2

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify when user click on the Add new lead button

Steps: 1-Click on the app launcher

2-Search for Leads

3-Click on the New button

4-Or directly click on the Lead module

5-Click on the Add New button.

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: None

Actual Results: Same as expected

Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

4.9.3 Test Case ID: TC-3

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify if all fields are available on new lead page layout

Steps: 1-Click on the app launcher

2-Search for Leads

3-Click on the New button

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: All fields should be available: -

- Company Name*
- First name/name of owner/MD
- Last Name*
- Title
- Nature Of Business
- Email *
- Phone
- Mobile
- Rating
- Website
- Name of person Releasing order/Payment
- Email
- Phone
- Mobile
- TIN/CST, GST
- PAN
- Proposed payment term
- Upper maximum limit
- Name and address of sister company, if any – long text area
- Address
- Customer/Lead Source
- Lead source name – text field
- Lead Status
- Description

Actual Results: Same as expected

Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

4.9.4 Test Case ID: TC-4

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify if all required fields are marked as required with (*)

Steps: 1-Click on the app launcher

2-Search for Leads

3-Click on the New button

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: All required fields should be marked as required with (*)

Actual Results: Same as expected

Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

4.9.5 Test Case ID: TC-5

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify if all fields are of same type as requested.

Steps: 1-Click on the app launcher

2-Search for Leads

3-Click on the New button

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: All fields should be of same type as requested.

Actual Results: Same as expected

Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

4.9.6 Test Case ID: TC-6

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify if all fields are editable.

Steps: 1-Click on the app launcher

2-Search for Leads

3-Click on the New button

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: All fields should be editable

Actual Results: Same as expected

Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

4.9.7 Test Case ID: TC-7

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify when user try to save form without filling required fields

Steps: 1-Click on the New Lead Button

2-left all the mandatory fields as blank

3-Click on the Save button

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: Form should not get saved without filling required fields and should show error.

Actual Results: Same as expected

Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

4.9.8 Test Case ID: TC-8

Use Case ID: UC-002

Use Case Name: Manual Lead Creation

Test Case Title: To verify when user try to save form with spaces and blanks in fields

Steps: 1-Click on the New Lead Button

2-left all the fields as blank

3-Click on the Save button

Test Data: System Administrator, General Manager, GM(Faridabad), Marketing Head

Expected Results: Form should not get saved without filling required fields and should show error

Actual Results: Same as expected

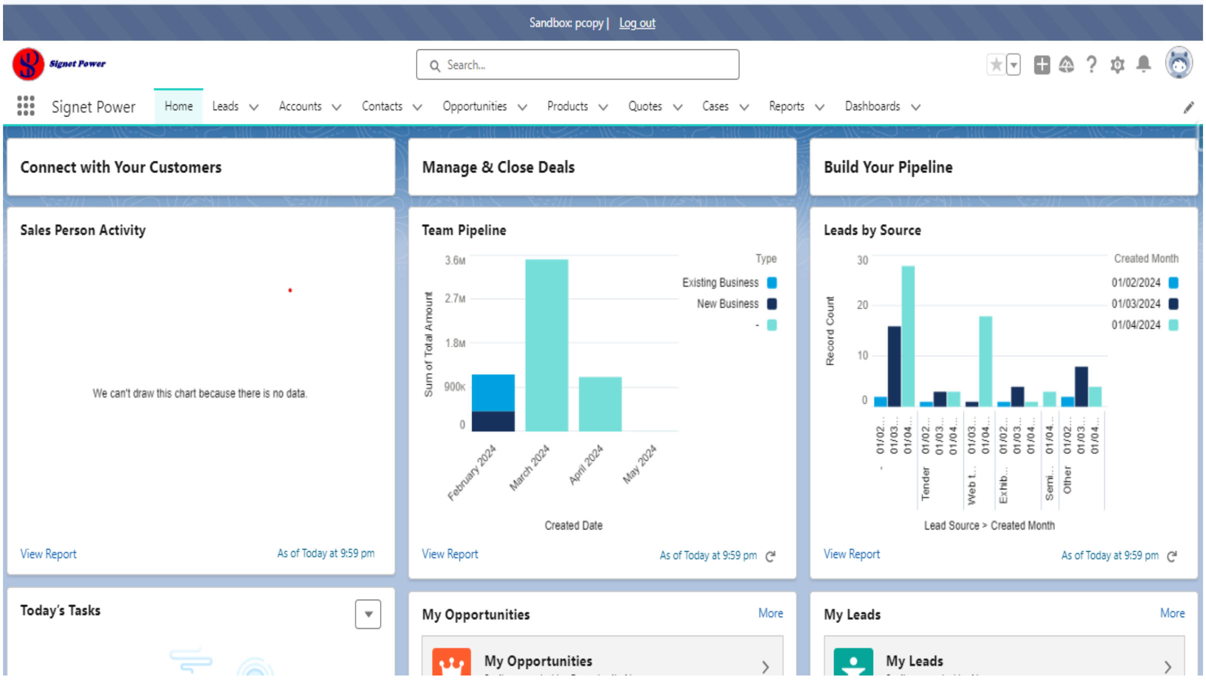
Validations: The system will not allow duplicate lead with Mobile and Email

Status: Passed

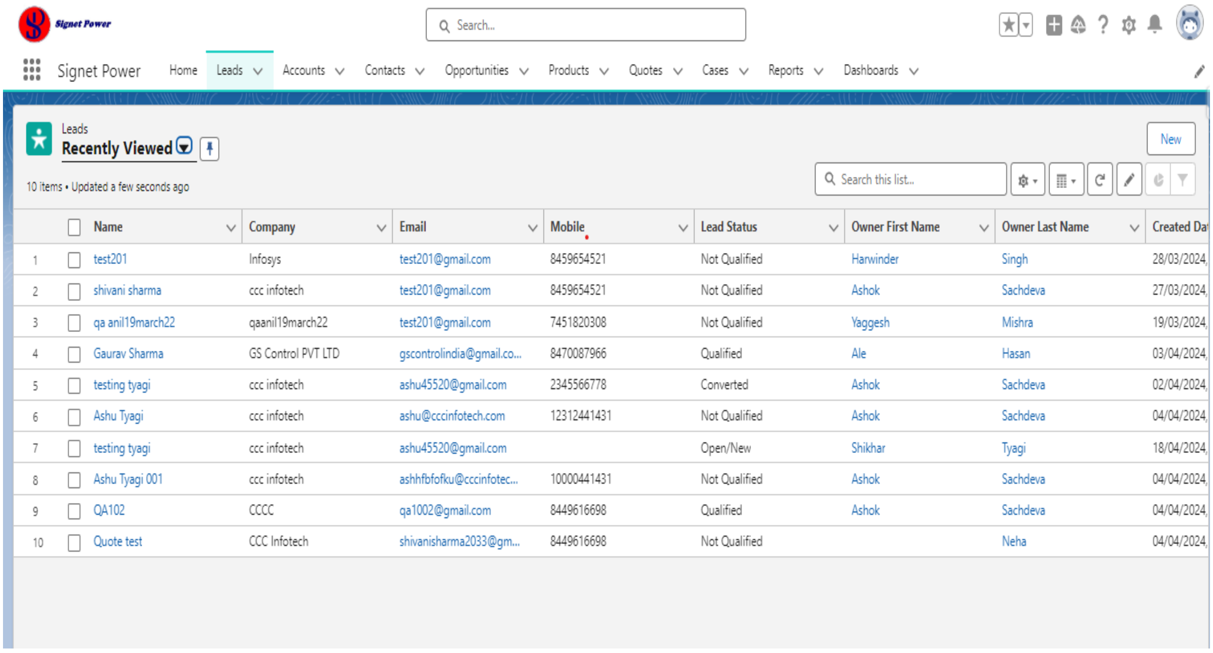
CHAPTER 5

RESULT

Screenshot of the project

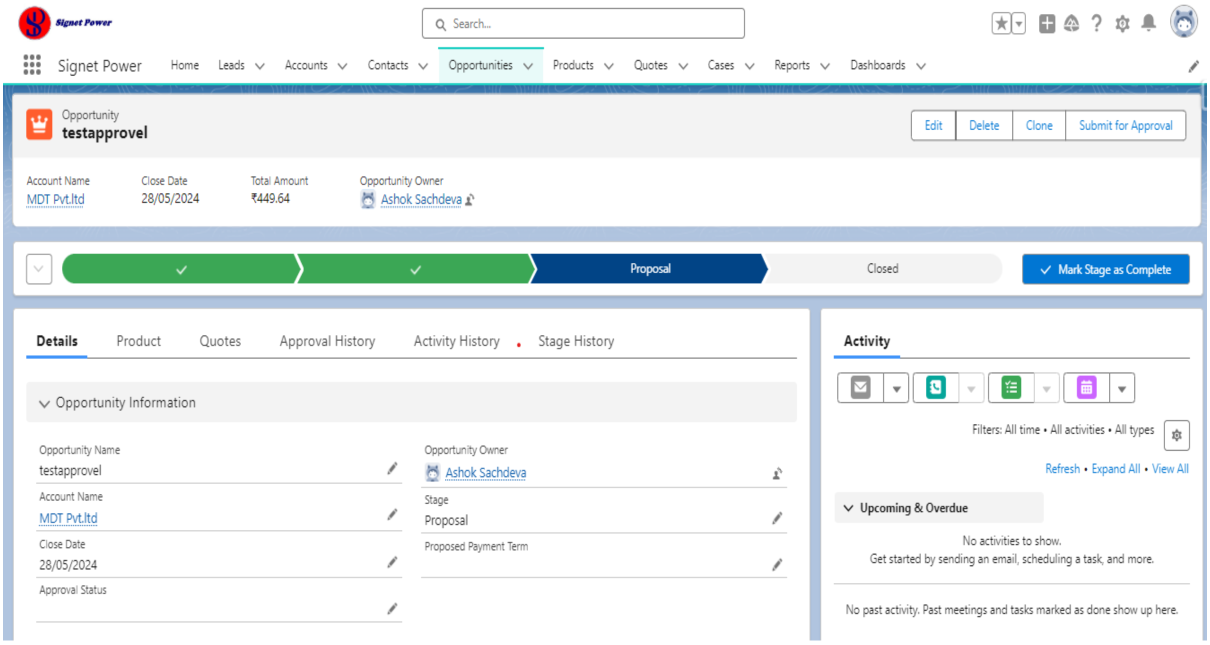


5.1 Lead Interface



	Name	Company	Email	Mobile	Lead Status	Owner First Name	Owner Last Name	Created Da
1	test201	Infosys	test201@gmail.com	8459654521	Not Qualified	Harwinder	Singh	28/03/2024,
2	shivani sharma	ccc infotech	test201@gmail.com	8459654521	Not Qualified	Ashok	Sachdeva	27/03/2024,
3	qa anil19march22	qaanil19march22	test201@gmail.com	7451820308	Not Qualified	Yaggesh	Mishra	19/03/2024,
4	Gaurav Sharma	GS Control PVT LTD	gscontrolindia@gmail.co...	8470087966	Qualified	Ale	Hasan	03/04/2024,
5	testing tyagi	ccc infotech	ashu45520@gmail.com	2345566778	Converted	Ashok	Sachdeva	02/04/2024,
6	Ashu Tyagi	ccc infotech	ashu@cccinfotech.com	12312441431	Not Qualified	Ashok	Sachdeva	04/04/2024,
7	testing tyagi	ccc infotech	ashu45520@gmail.com		Open/New	Shikhar	Tyagi	18/04/2024,
8	Ashu Tyagi 001	ccc infotech	ashhfbfofku@cccinfotec...	10000441431	Not Qualified	Ashok	Sachdeva	04/04/2024,
9	QA102	CCCC	qa1002@gmail.com	8449616698	Qualified	Ashok	Sachdeva	04/04/2024,
10	Quote test	CCC Infotech	shivanisharma2033@gm...	8449616698	Not Qualified		Neha	04/04/2024,

5.2 Opportunity process



REFERENCES

http://www.w3schools.com

http:// www.stackoverflow.com

http://wikipedia.com

https://www.youtube.com/

https://www.google.com/

https://trailhead.salesforce.com/