🌱 GreenFuture CRM

Project Title

GreenFuture CRM – Carbon Credit & Sustainability Partnership Management

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Industry

Climate Tech / Environmental Sustainability / Renewable Energy

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Project Type

Customer Relationship Management (CRM) built on Salesforce (Admin + Developer Capstone Project)

Target Users

- Corporate sustainability teams (Net Zero initiatives)
- NGOs managing carbon offset projects (tree plantation, recycling, renewable energy)
- Carbon credit buyers & investors
- Government auditors and compliance officers
- Sustainability consultants & vendors

Problem Statement

Organizations striving for Net Zero face challenges in tracking sustainability projects, managing carbon credits, ensuring compliance, and reporting impact. **GreenFuture CRM on Salesforce** centralizes project and partner management, automates credit trading, tracks sustainability impact via dashboards, and ensures transparency and accountability in the green economy.

As global focus on climate change increases, organizations are under pressure to achieve **Net Zero goals**. However, most companies face difficulties in:

- Tracking sustainability projects (solar, forestry, recycling) across multiple partners.
- Managing issuance and trading of **carbon credits** with transparency.
- Ensuring compliance with international standards and certifications.
- Demonstrating impact to customers, investors, and regulators.
- Automating communication and reporting on sustainability contributions.

To address these challenges, the company wants to implement **GreenFuture CRM on Salesforce** to:

- Centralize management of projects, credits, partners, and compliance reports.
- Automate credit trading lifecycle with approval workflows.
- Track sustainability impact with real-time dashboards.
- Enable integration with external carbon pricing APIs and NGO databases.
- Provide transparency and accountability in the green economy.

Use Cases

Lead Management

- Automatically capture sustainability leads from web forms, NGOs, and social campaigns.
- Assign leads to officers based on region/project type.
- Qualify leads using a "Green Interest Score" (commitment to net-zero targets).

Project Management

- Maintain inventory of carbon offset projects with type, location, credits issued, and partners. • Track lifecycle: proposed → verified → approved → active → completed.
- Monitor progress through audit and certification stages.

Credit Trading & Transactions

- Manage carbon credits with details: project source, amount, expiry, buyer.
- Record and track sales/purchases of credits with audit trails.
- Prevent expired credits from being sold using validation rules.

Partner & Compliance Management

- Maintain sustainability partner directory with certifications and ratings.
- Automate compliance checks and certification renewals.
- Generate annual *compliance and sustainability reports* for stakeholders.

Engagement & Notifications

- Notify buyers when new projects launch or when credits are about to expire.
- Send automated SMS/email updates after purchase.
- Provide personalized dashboards showing buyer's sustainability contributions.

Deal Closure

- Update deal status with negotiation, purchase orders, and signed contracts.

- Capture booking amount and compliance documents.
- Auto-generate digital acknowledgment certificates for offset purchases.

Reporting & Dashboards

- Dashboard showing *credits issued vs credits sold*.
- Buyer contribution report towards net-zero goals.
- Partner performance report with sustainability impact metrics.
- Real-time Sustainability Scoreboard for emissions reduced, trees planted, renewable energy generated.
- Lead funnel and officer activity tracking.