



Project Title

GreenFuture CRM – Carbon Credit & Sustainability Partnership Management

Industry

Climate Tech / Environmental Sustainability / Renewable Energy

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
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Problem Statement

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.
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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.