Smart Internz

CRM APPLICATION TO ENGINEERING WORKS
SALESFORCE PROJECT REPORT

PROJECT CREATED BY

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PROJECT REVIEWED BY

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ProjectTitle : A CRM APPLICATION TO ENGINEERING WORKS

1. Project Overview

This project involves the development and implementation of a Customer Relationship Management (CRM) system tailored specifically for engineering works. The goal of the project is to streamline client management, enhance customer engagement, and optimize operational processesthroughSalesforce.ByleveragingSalesforce'scomprehensive CRM platform, engineering firms can efficiently manage customer data, track interactions, and improve the client experience from project initiation to completion.

2. Project Objectives (Points only)

Centralized Customer Data Management: Maintain a unified database for client information, ensuring ease of access and management.

Streamlined Communication: Implement channels for seamless interaction between clients and the engineering team.

Analytics and Reporting: Provide actionable insights into project performance, client engagement, and overall business metrics.

3. Salesforce Key Features and Concepts Utilized

InimplementingthisCRMapplication,severalcoreSalesforcefeaturesand concepts were utilized:

- **Salesforce CRM**: To consolidate customer interactions, lead tracking,and account management within a singleplatform.
- **SalesforceAutomation**:Usedto streamline repetitive tasks suchas follow-ups, task assignments, and project updates.
- **SalesCloud**:Enabled for lead conversion,pipeline management, and sales forecasting specific to engineering project workflows.
- **CustomObjectsandFields**:Created to capture engineering-specific data that standard Salesforce fields do not support.
- **ReportsandDashboards**:Configured to provide visualinsightson project statuses, customer engagement, and team performance.
- **WorkflowRulesandProcessBuilder**:Implementedtoautomate workflowsbasedon certaintriggers,suchasnotifyingthesales team when a new lead is entered.
- **APIIntegrations**:SetuptosyncdatabetweenSalesforceandother applications used by engineering teams, ensuring a unified data flow.

4. Detailed Steps to solution Design

1. **RequirementGathering and Analysis**:

- Consultedstakeholderstogatherrequirementsspecificto engineering workflows.
- IdentifiedkeyCRMfeaturestosupportcustomerinteraction tracking, project status monitoring, and documentation management.

2. **Salesforce Setup and Configuration:**

- ConfiguredSalesforceinstanceswithSalesCloud.
- Created custom objects to accommodate data unique to engineeringworks(e.g.,projectspecs,engineeringdocuments).
- Setuprolesandprofilestoensuredatasecurityandaccess control.

3. **Data Modeling and Field Customization:**

- DefinedcustomobjectssuchasProjects,Clients,andTasks.
- Addedfieldstocaptureessentialdata,includingprojectstartand end dates, budgets, materials used, etc.

4. **Workflow Automation:**

- Configuredworkflowstoautomatetaskassignments,lead conversions, and client follow-ups.
- Createdrulesthattriggeremail notificationsfornewleadsorwhen projects reach critical milestones.

5. Integration with Engineering Tools:

- IntegratedSalesforcewithprojectmanagementandengineering software to sync project updates in real time.
- UsedAPIstoallowseamlessdatatransferbetweenSalesforceand other engineering tools.

6. Design of Dashboards and Reports:

- Developeddashboardstodisplaykeyperformanceindicators,such as project progress, team efficiency, and client satisfaction.
- Createdreal-timereportsfortrackingthesalespipeline,revenue forecasts, and project health.

5. Testing and Validation

- **UnitTesting**:ValidatedeachmoduleoftheCRMapplicationfor engineering workflows independently.
- **SystemTesting:**EnsuredallSalesforcefeatures,includingcustom objects, workflows, and integrations, functioned cohesively.
- **UserAcceptanceTesting(UAT):**Conductedwithstakeholdersto confirm that the CRM solution met business requirements.
- **LoadTesting**:Testedsystemperformanceunderdifferentloadsto ensure stability during peak usage times.

6. Key Scenarios Addressed by Salesforce in this Implementation Process

- **Lead Management**: Automated lead assignment to sales engineers,ensuringpromptfollow-upsandreducingthechancesof losing potential clients.

- **ProjectLifecycleTracking**:Allowedteamstotrackthestatusof each engineering project, from design and approval to implementation and delivery.

- **Client Communication and Documentation**: Centralized client communicationsandengineeringdocumentswithinSalesforcefor easy access and retrieval.

- **Forecasting and Budget Management:** Provided accurate forecastingofprojectcostsandtimelinestohelpengineersand managers make informed decisions.

- **Customer Feedback and Follow-Up**: Enabled tracking of customersatisfactionandautomatedremindersforpost-project feedback collection.

7. Conclusion

The CRM application for engineering works successfully streamlined client relationship management, project tracking, and communication processeswithinengineeringteams.ByutilizingSalesforce’sextensive CRM capabilities, the application provided a unified platform that improved efficiency, boosted client satisfaction, and enabled more informed decision-making across engineering projects. This
implementation highlights Salesforce’s adaptability in addressing the uniqueneedsofengineeringworkflows,offeringanagile,data-driven solution for customer management and project oversight

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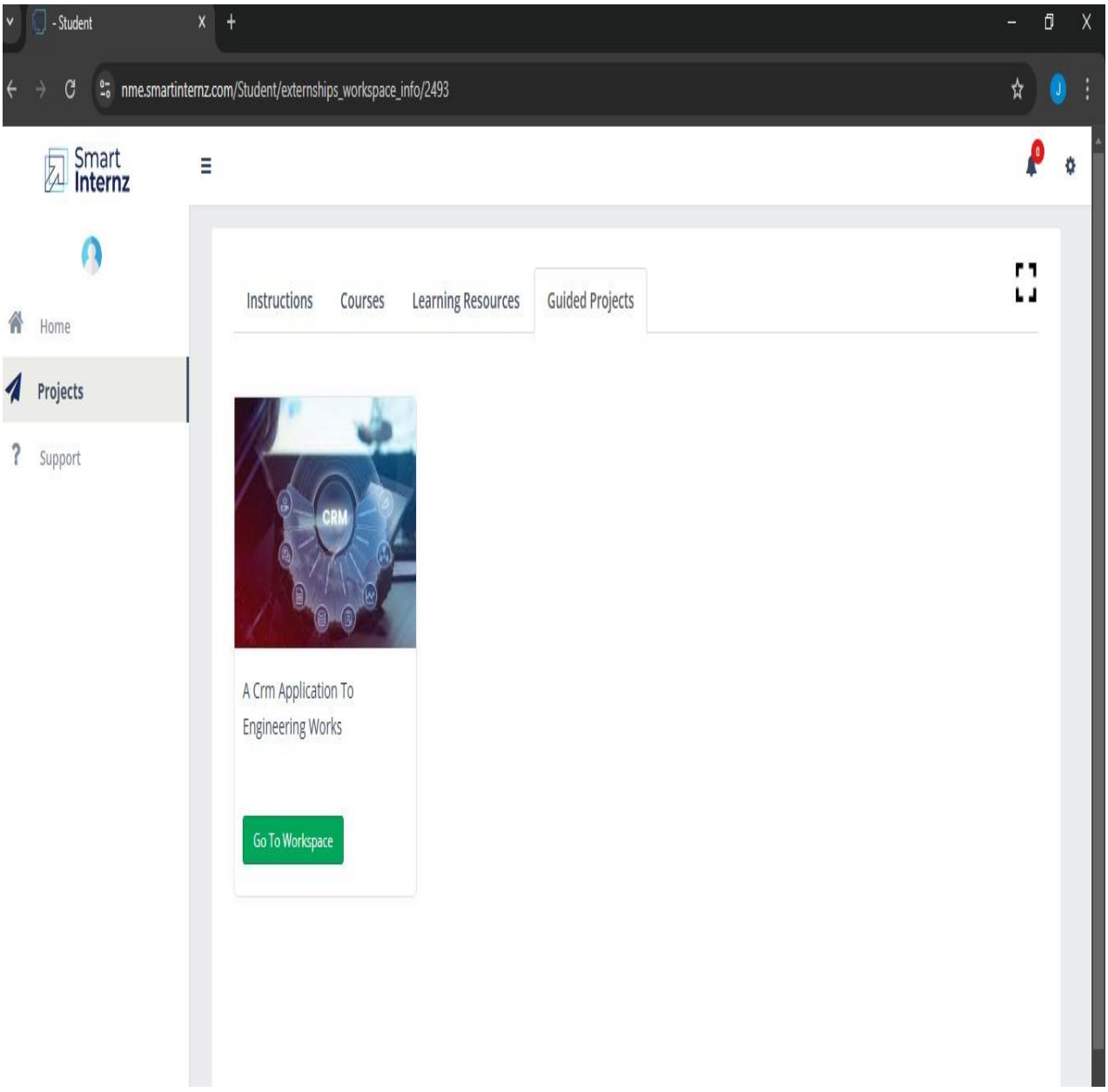
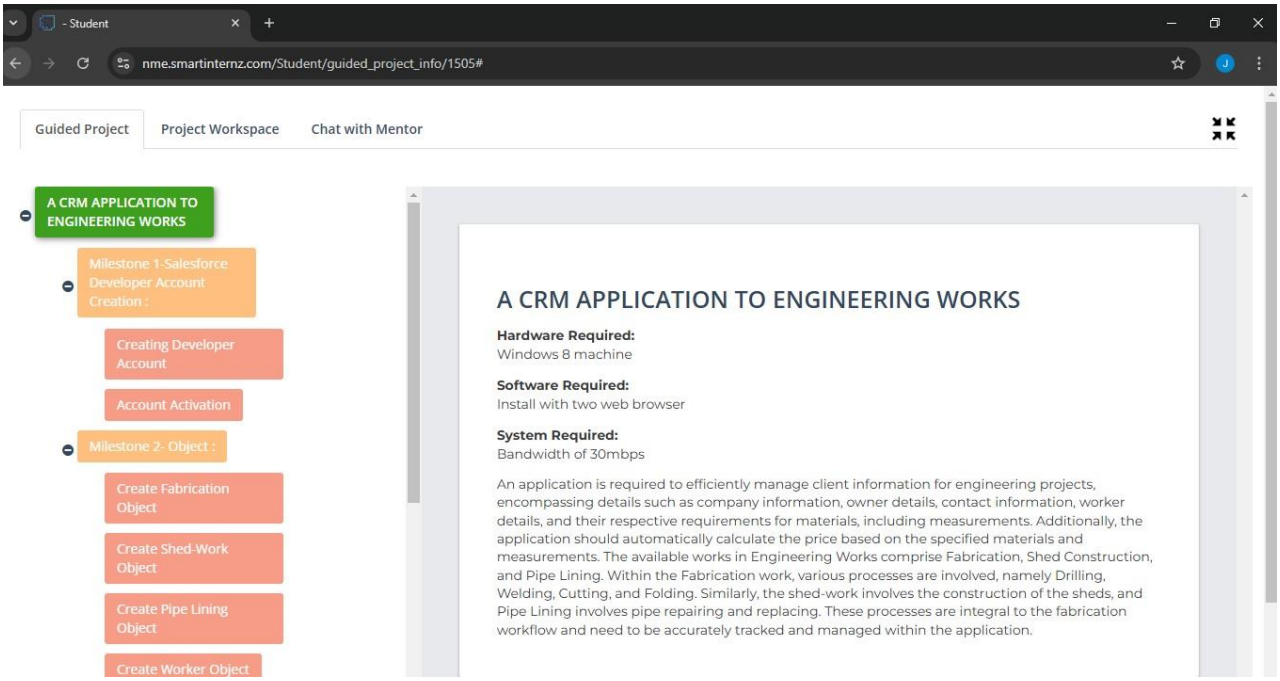
ScreenShots of the CRM Application:

Guided Project :

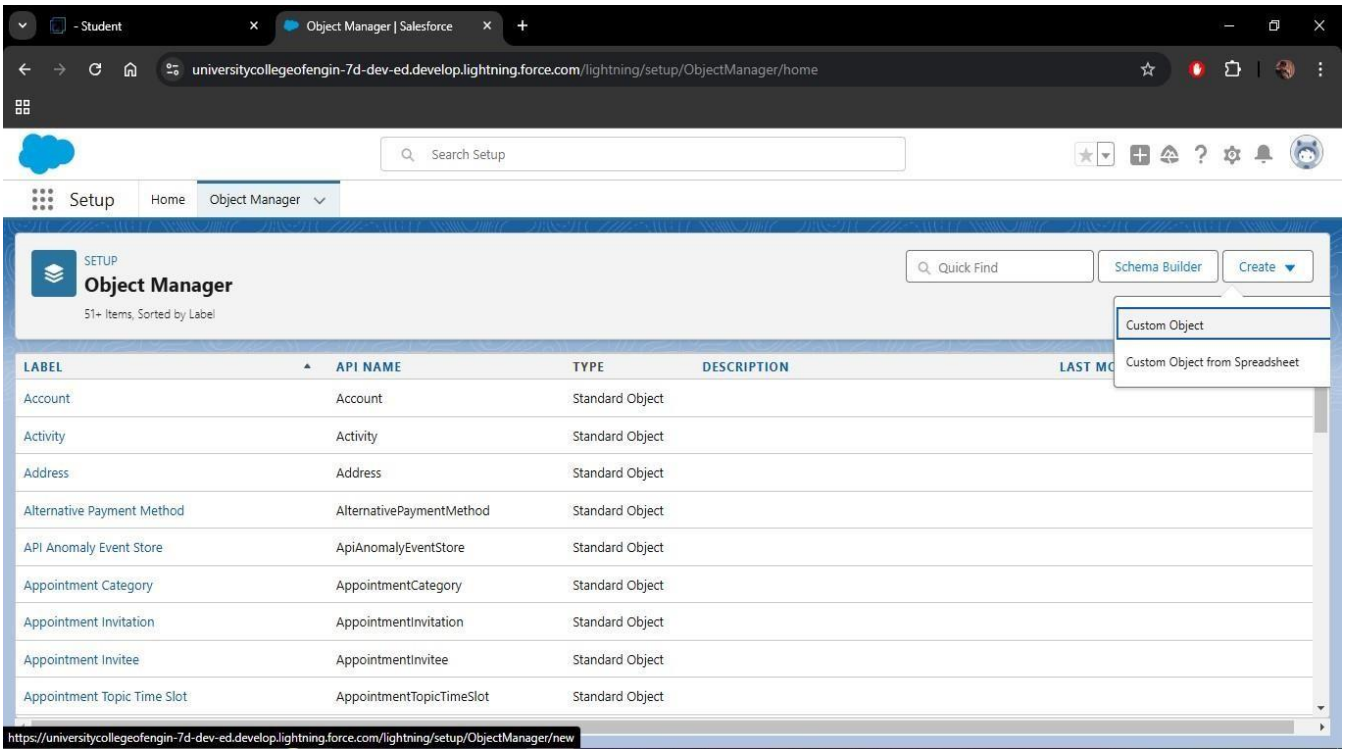
A CRM Application to Enginnering Works



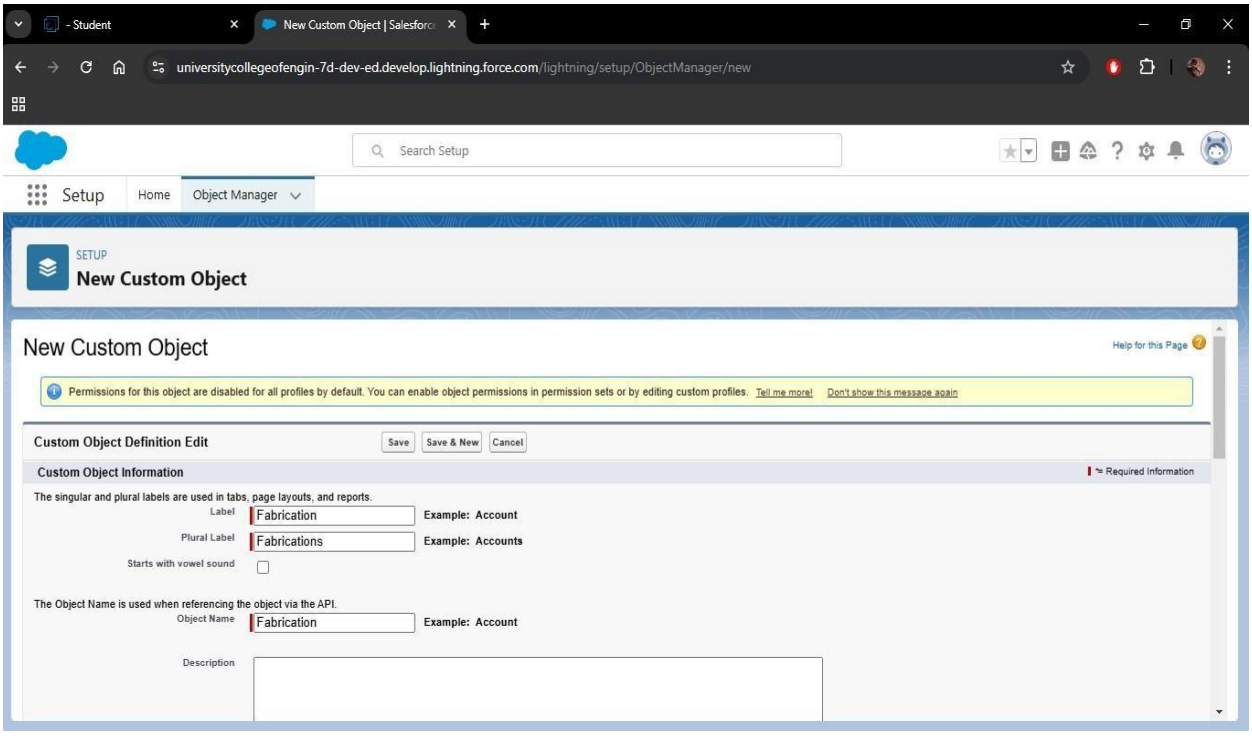
Work Flow for the Project:

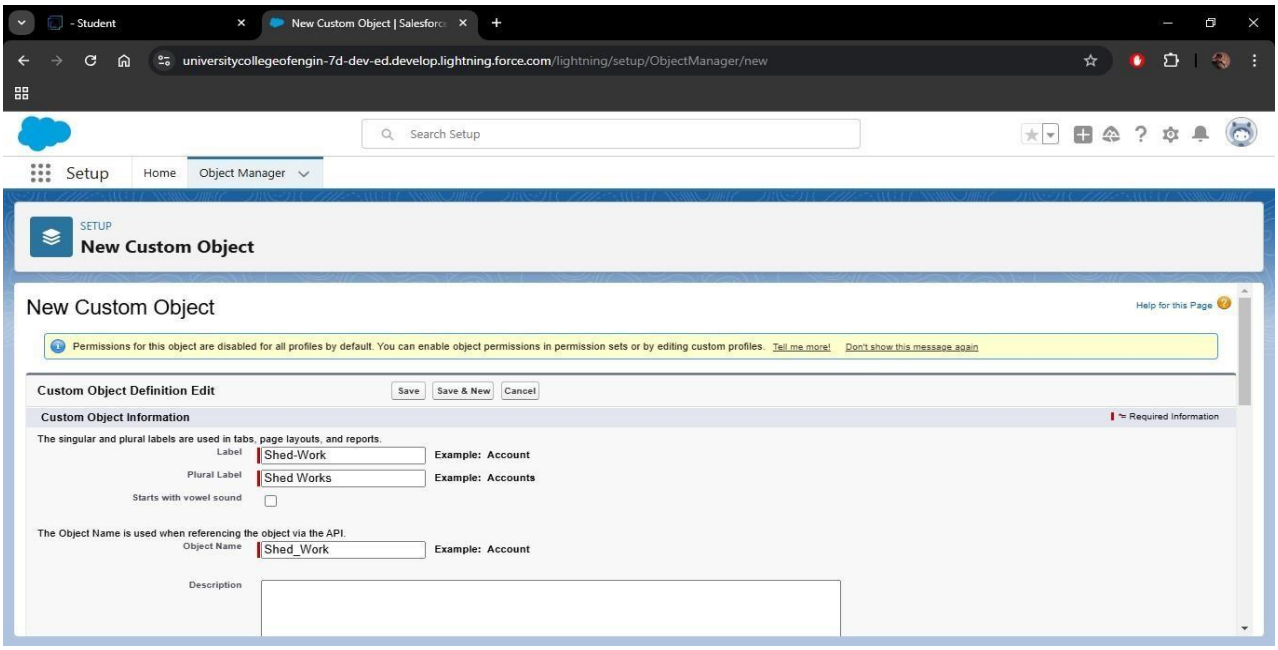


Object Manager:

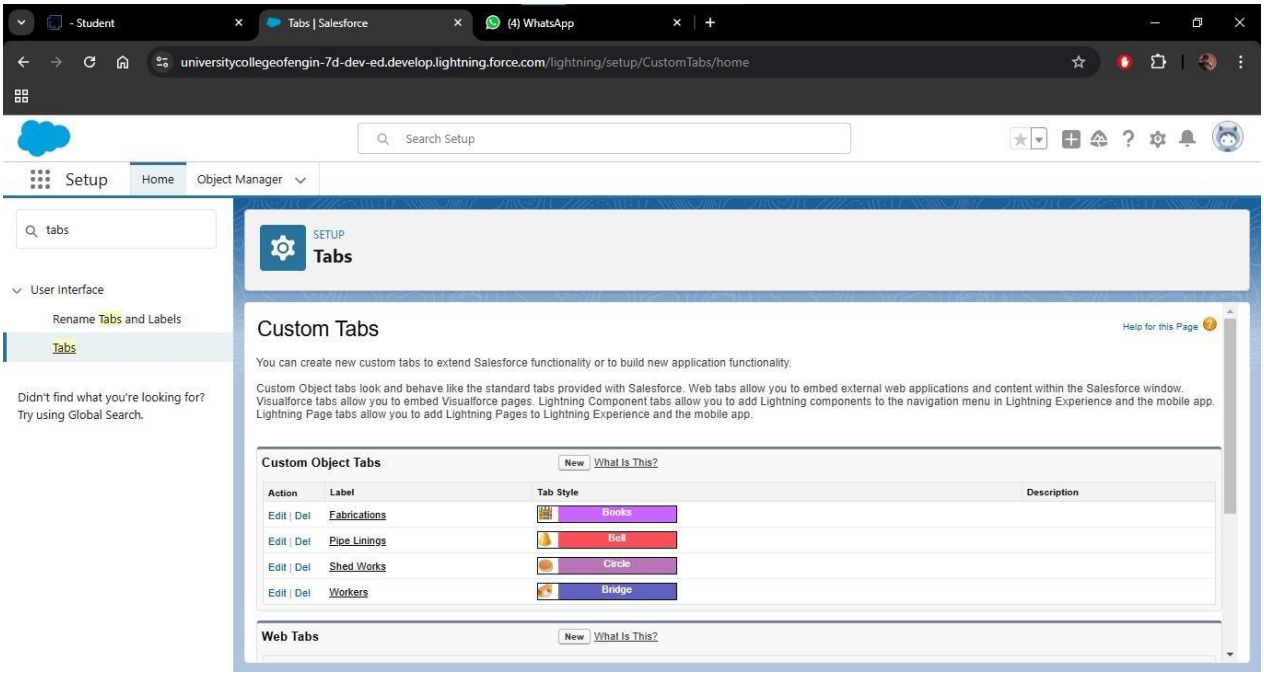


Creation of Various Objects in the Project:

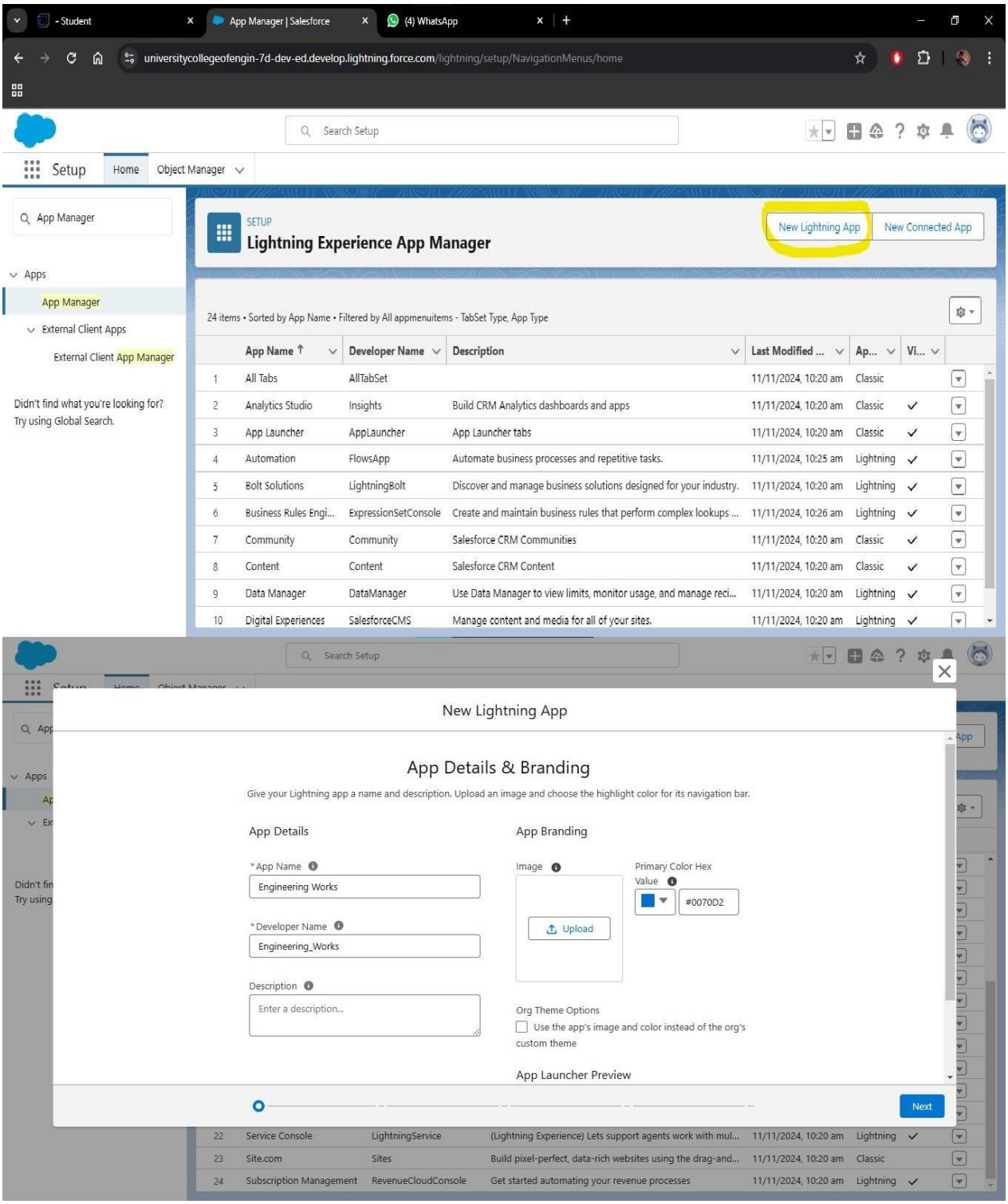




Custom Tabs:



Creation of Lightning App:



Assigning Fields for the Objects:

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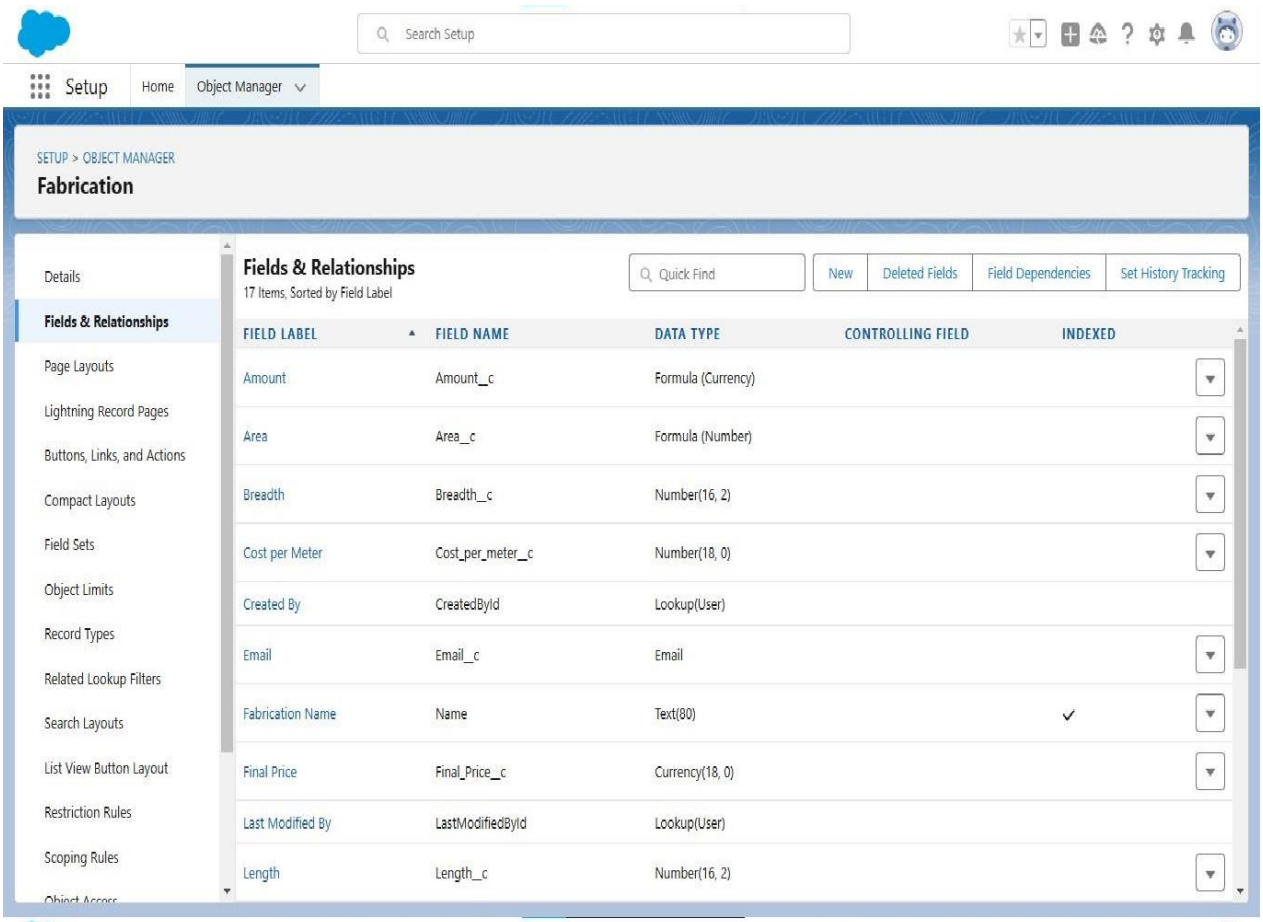

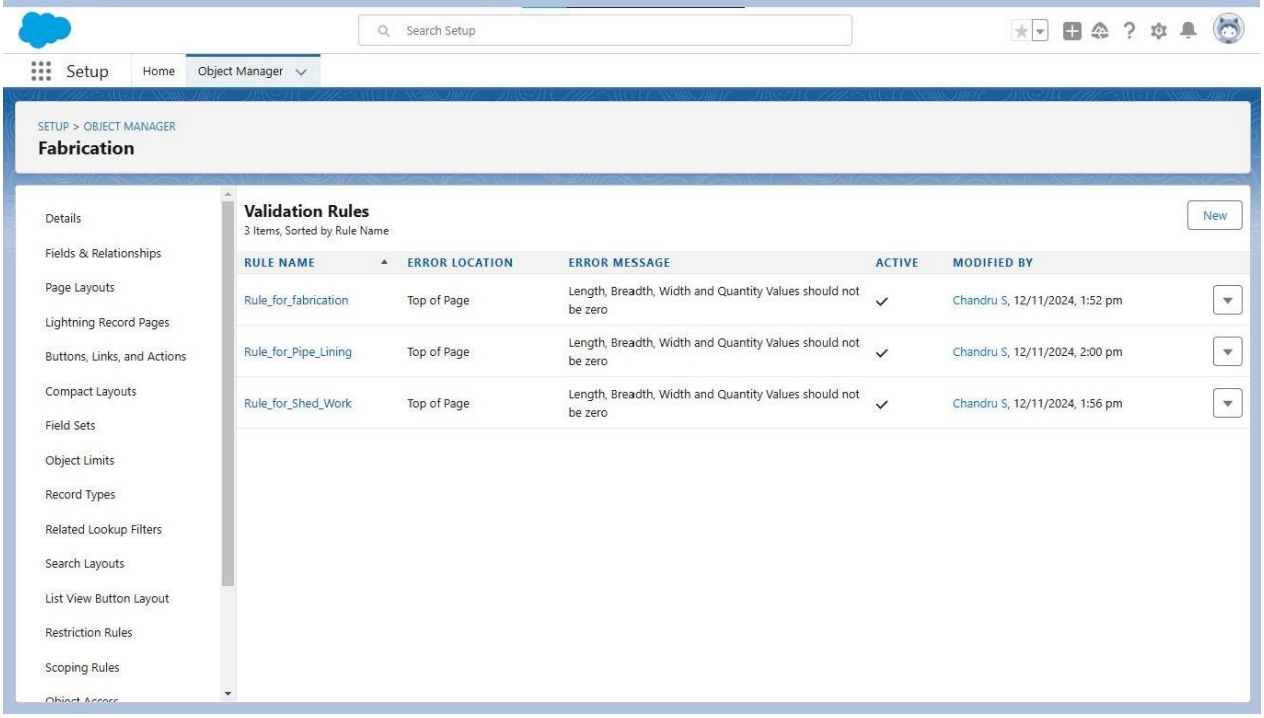

Using Letterheads for Email Purpose:

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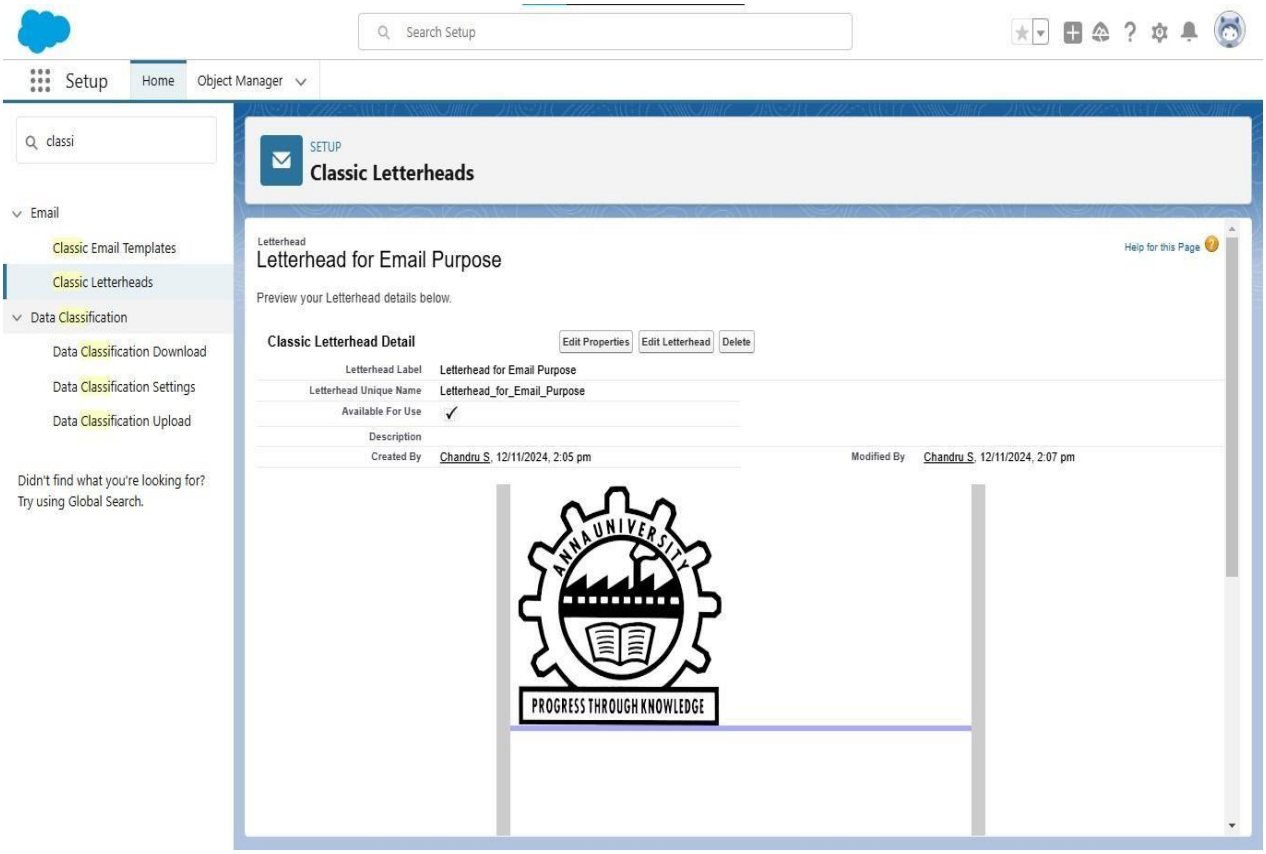
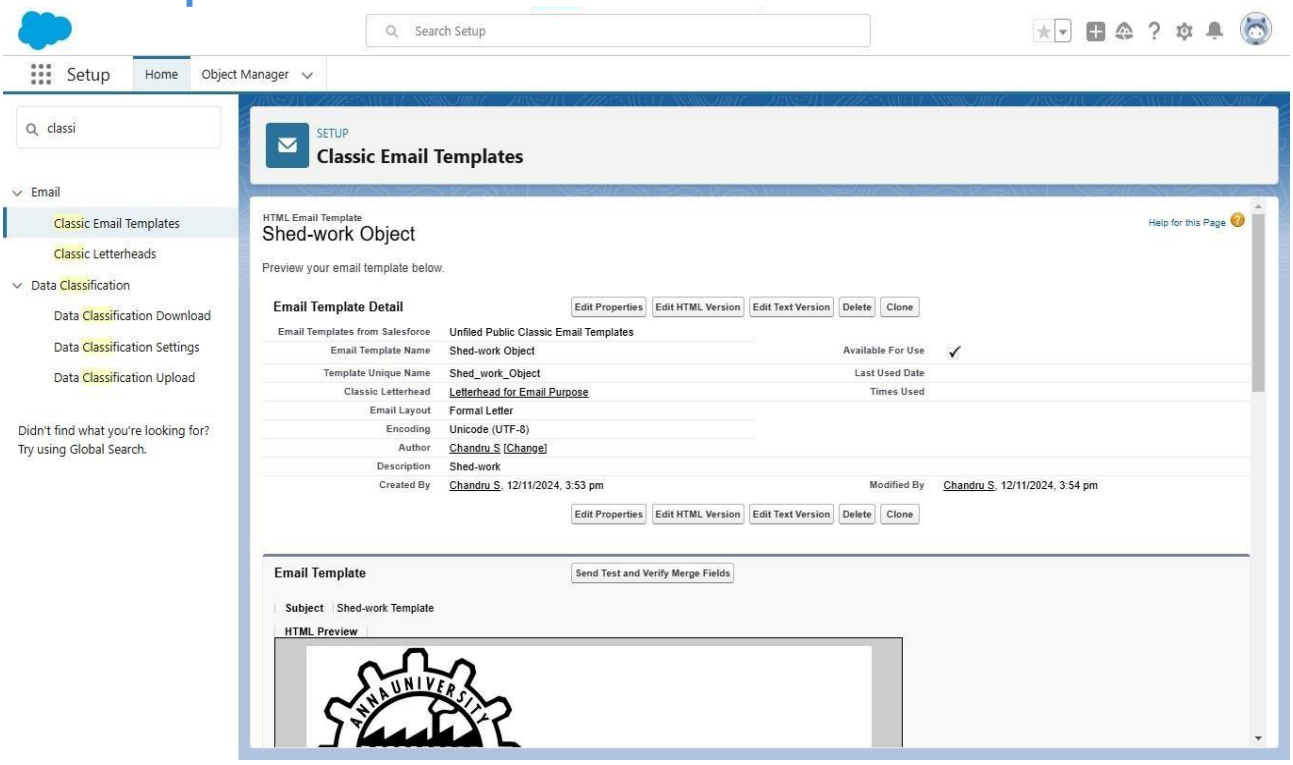
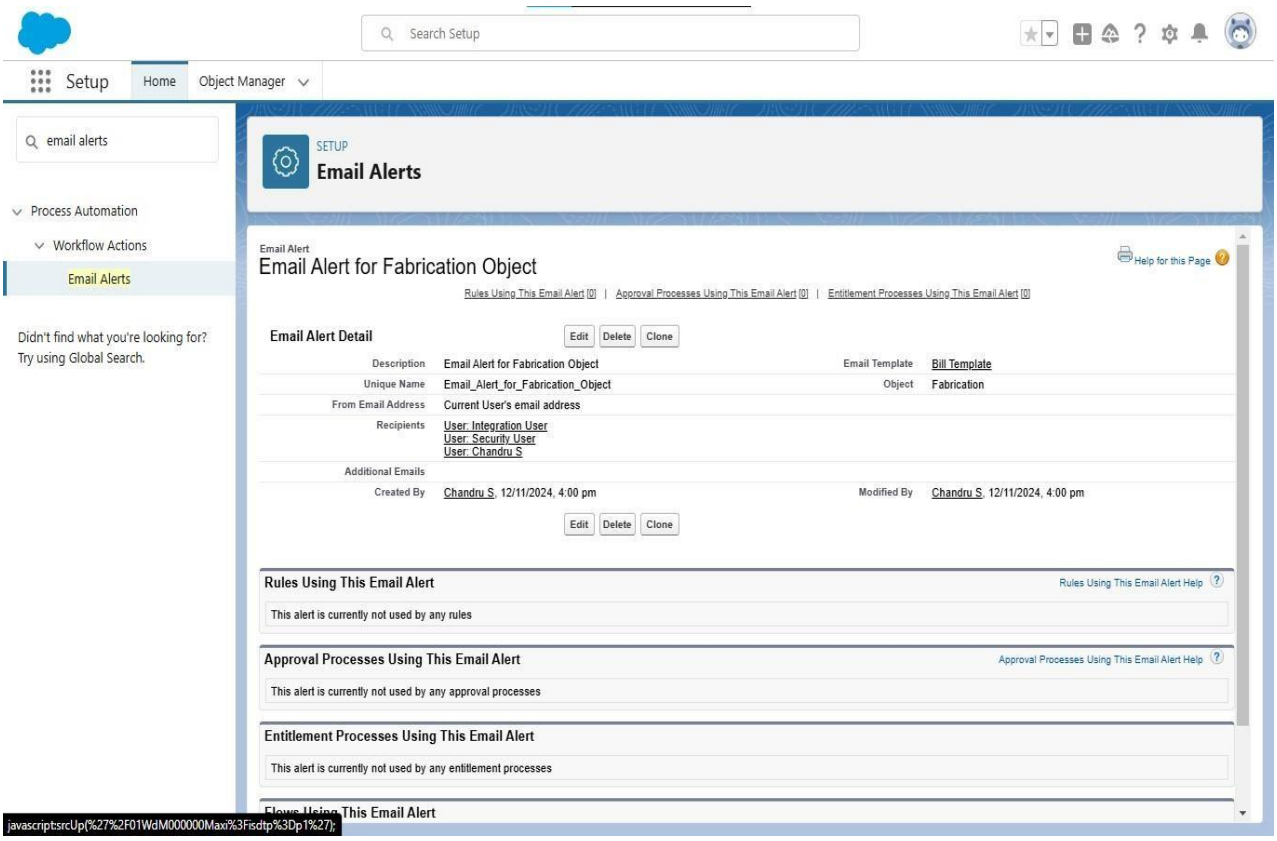
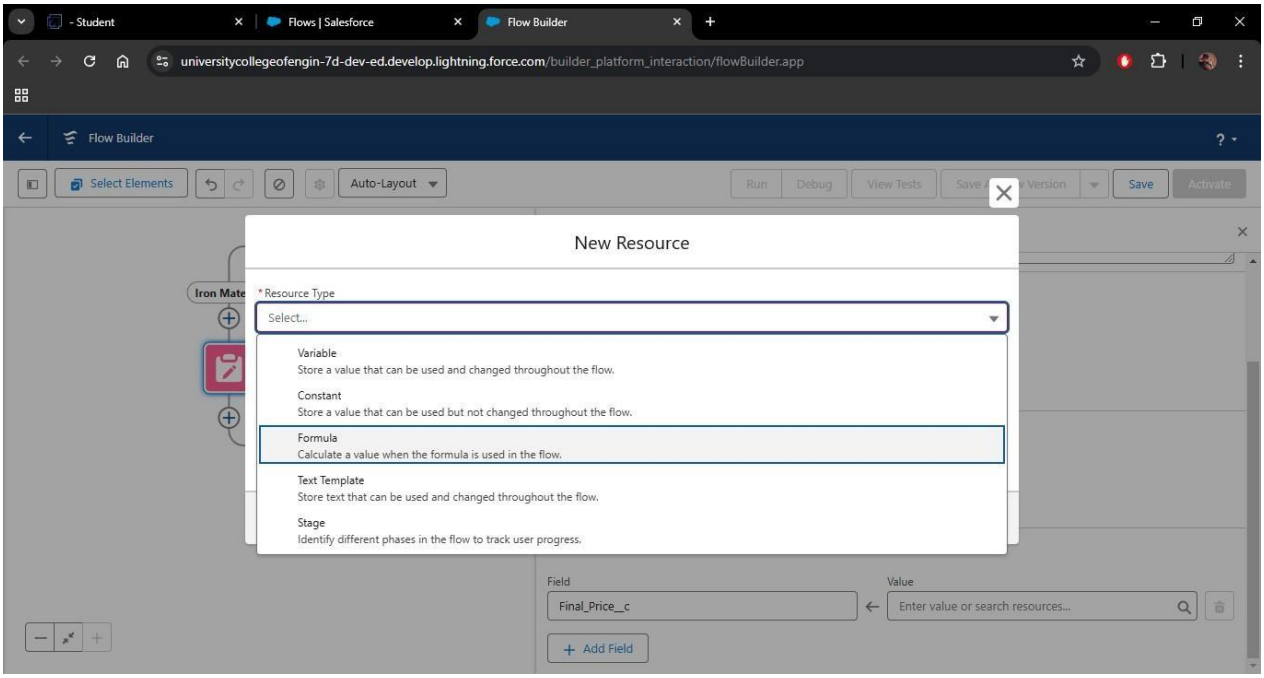


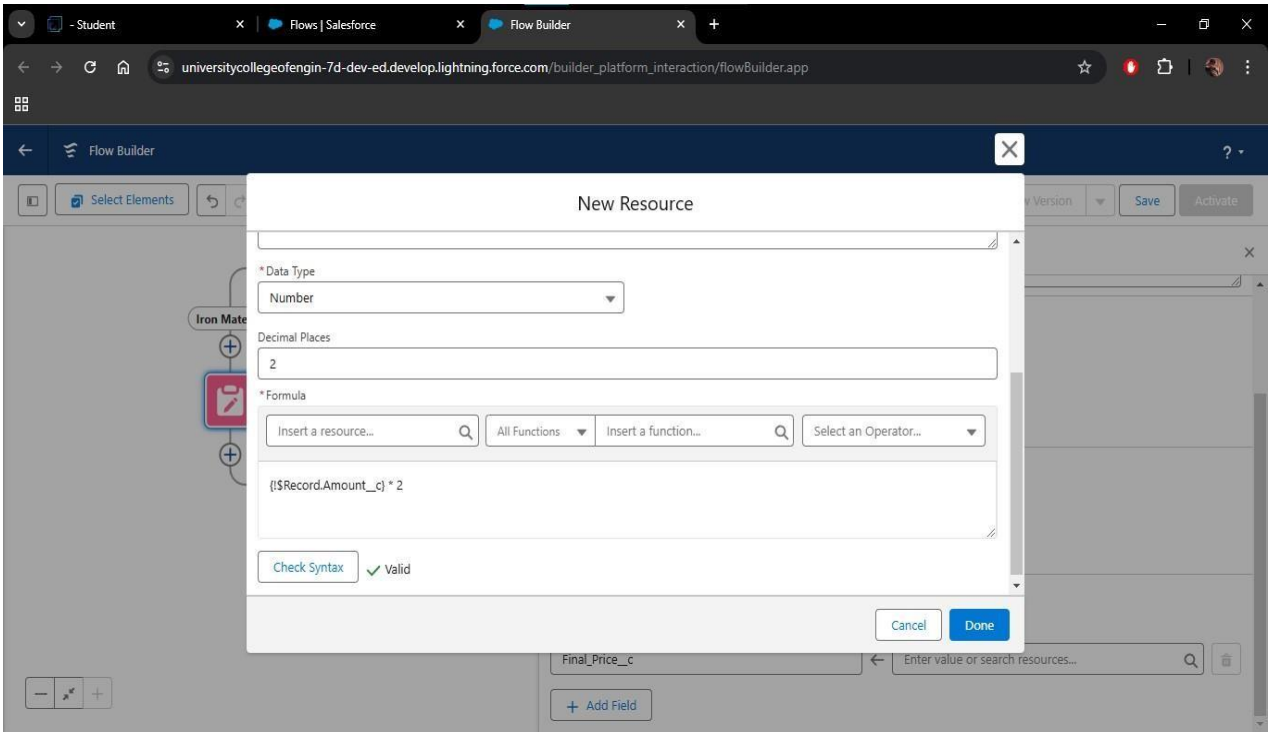
Email Templates and Alerts:



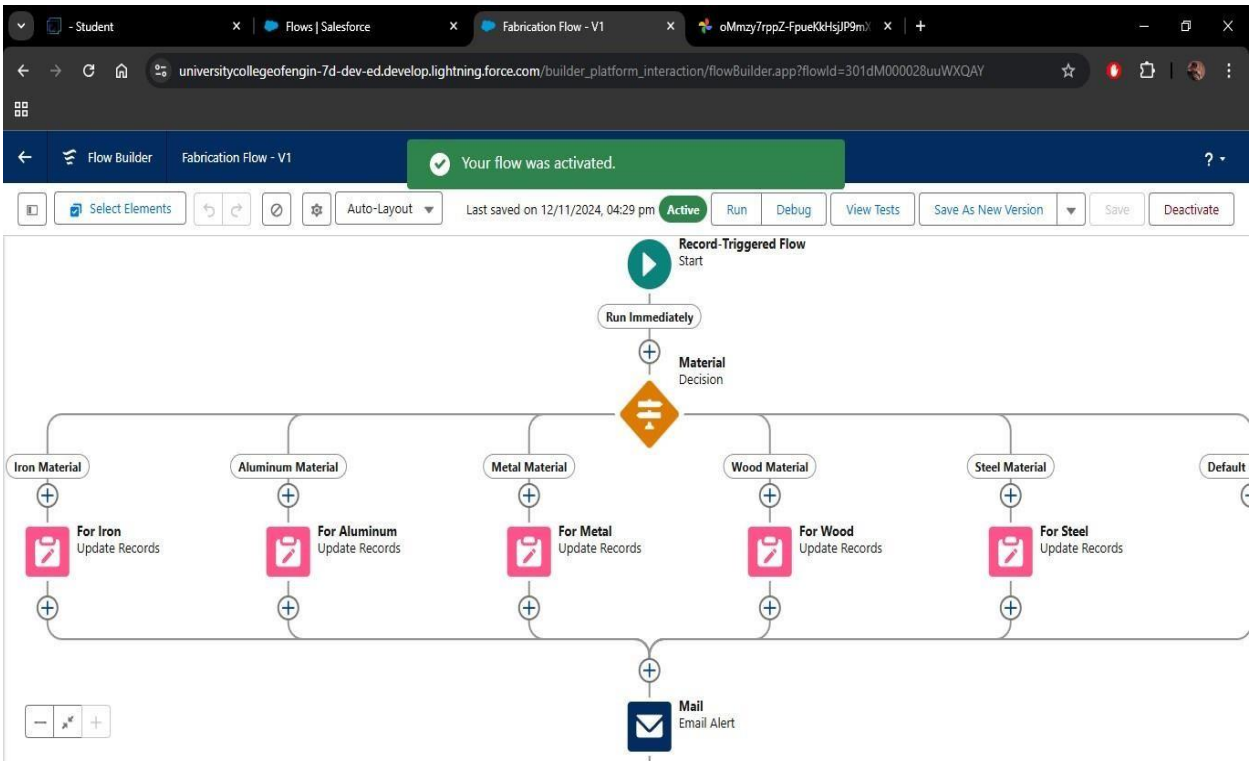


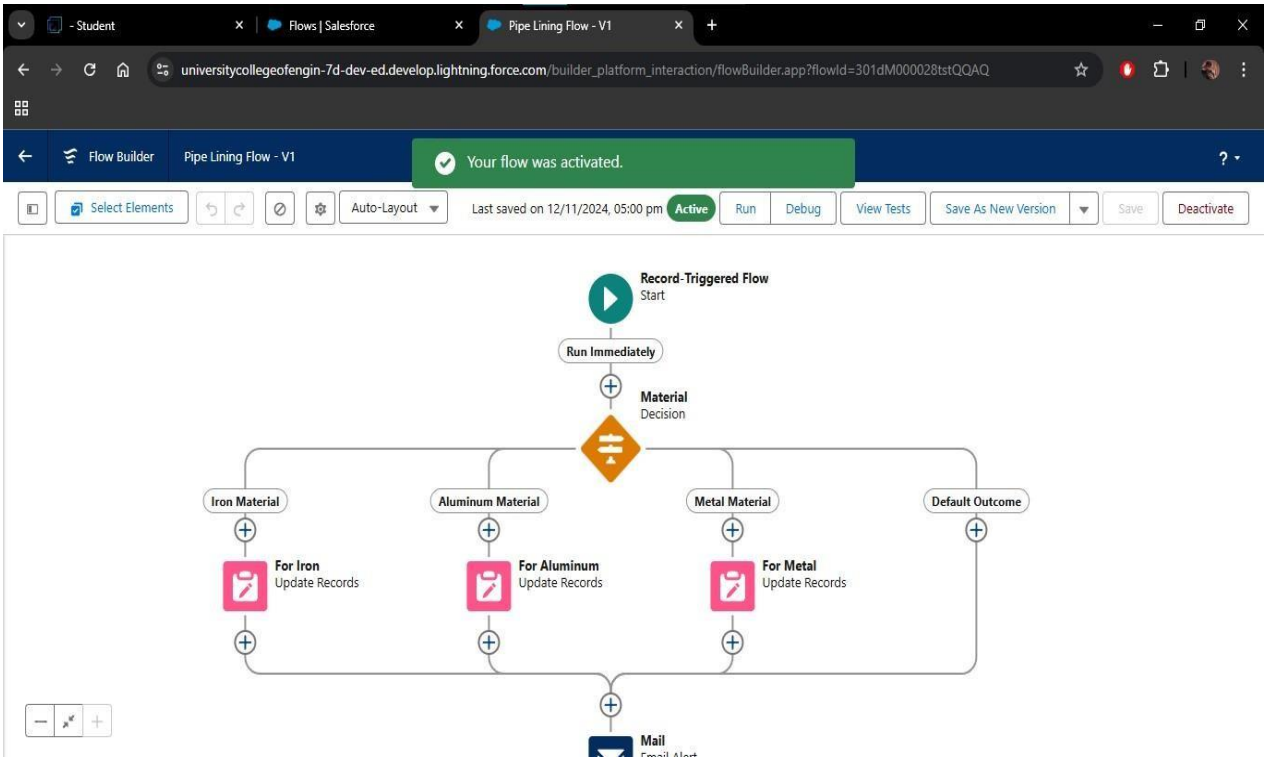
Flow Builder for Various Objects:





Activation of Flows:




- Student
Flows | Salesforce
Pipe Lining Flow - V1
universitycollegeofengin-7d-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dM000028tstQQAQ
Flow Builder
Pipe Lining Flow - V1
Your flow was activated.
Select Elements
Auto-Layout
Last saved on 12/11/2024, 05:00 pm
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Run Immediately
Material
Decision
Iron Material
Aluminum Material
Metal Material
Default Outcome
For Iron
Update Records
For Aluminum
Update Records
For Metal
Update Records
Mail

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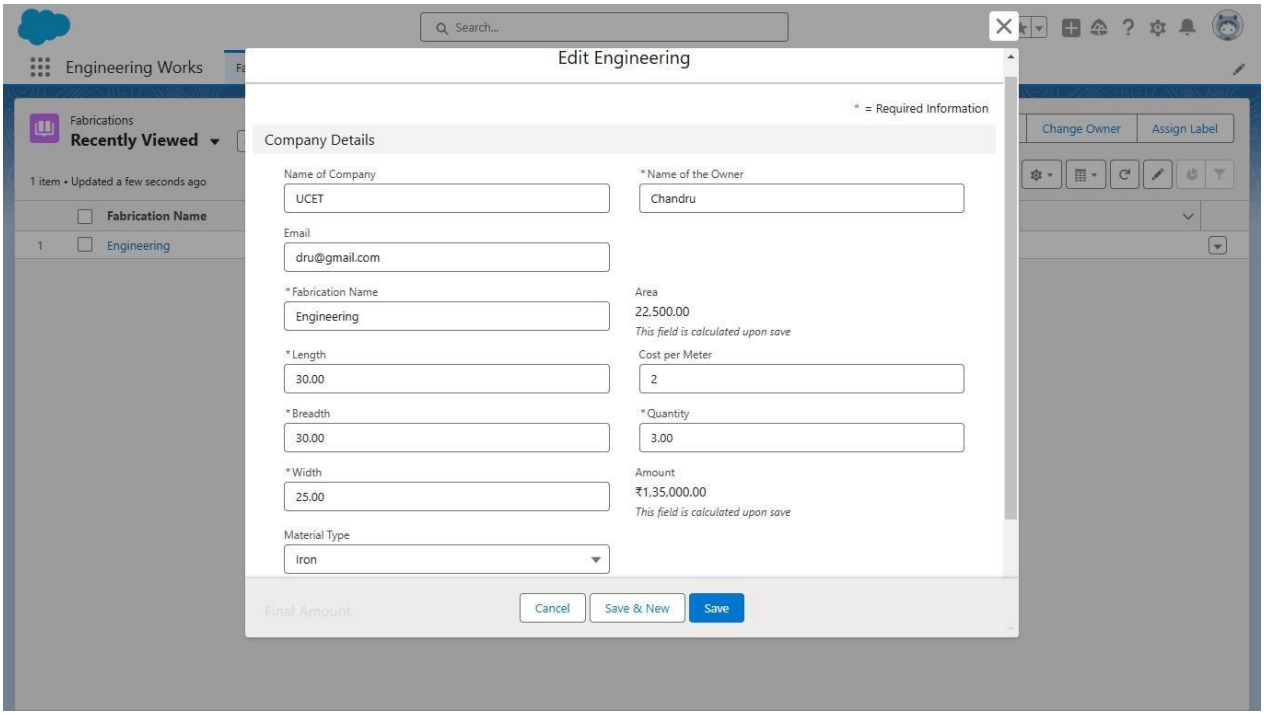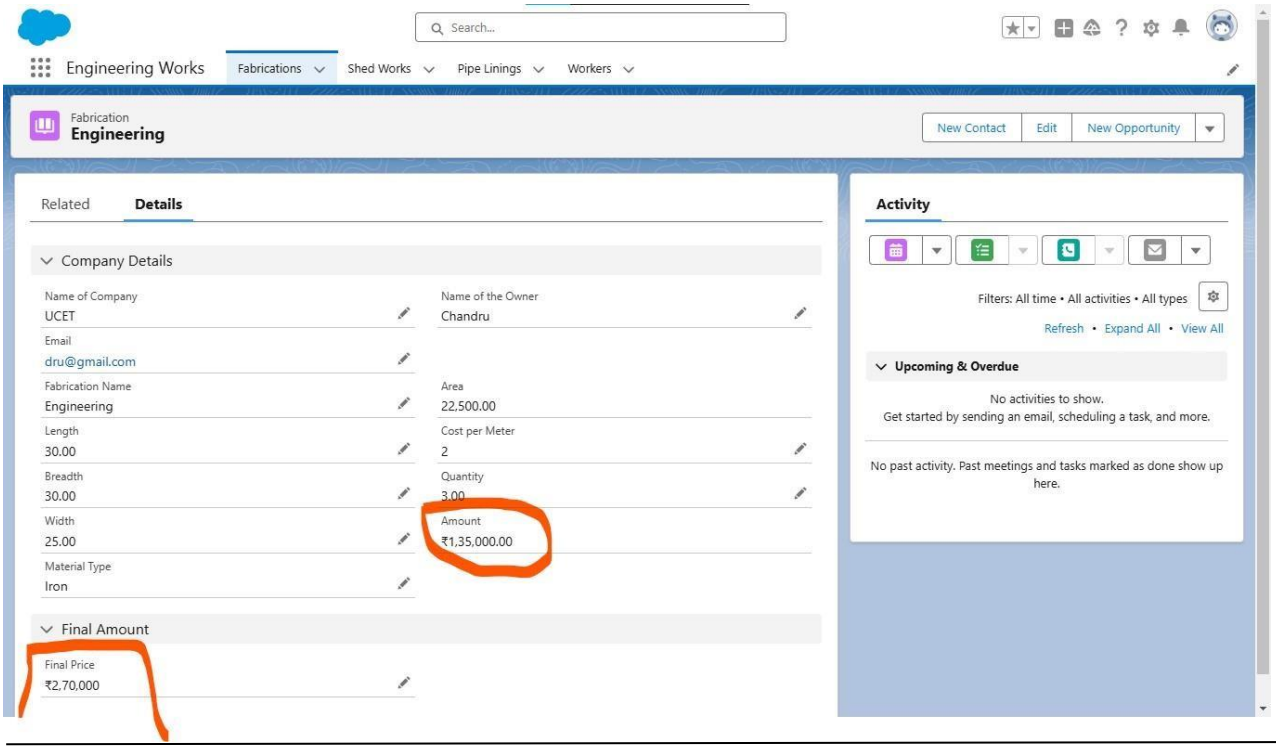
Conclusion: Flow to calculate Final Price on Fabrication Object based on Material Type