



# Customer Relationship Management

## Mid Term Presentation

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# Abstract

- Application for managing all of your customers' interactions and relationships is customer relationship management (CRM).The objective is to Enhance business connections. We can stay in touch with customers thanks to a CRM system. The majority of users are internal teams, like sales teams. The CRM application has two end users: an administrator and an employee. Employees are the users who interact with customers using CRM, typically members of an internal team like sales representatives.
- Maximizing customer profitability, behavior, and satisfaction.
- CRM builds the Interactions with every Customers and Keeps tract of the customer Activity.

# Objective and Scope of CRM

## Objective:

- Manages the Activities between the Customer and the Employee.
- Maintain Record of the Customer.
- Employees can schedule the activity of the customer.
- Employees can view the Due Activities of present-day and complete them.
- Employees can view all the activities which are pending and can reschedule/manage them.
- Notify the Employees before the day of the scheduled activity.
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## Scope of the Project:

- Reduces paper/manual work hence saves time and effort.
  - Employees get notification of their pending activity prior day so they can complete the call/activity.
  - Employees need not check/remember what tasks they have as they get a notification.
- Reduced the inbox/emails regarding calls/activities

## Admin:

- Admin creates User with username, password, and Role.

## User:

- Login
- Change Password
- Add customers
- Create Opportunities
- Schedule Activity

## Customer:

- User adds a Customer of Particular Type with Customer Email, contact number, and City.

## Opportunity:

- Opportunities with particular Customers are created.

## Activities:

- Activities on a particular Opportunity is Scheduled and Interaction are created and Recorded.
- . Next activity can be Scheduled or End an activity.

# Technical Stacks

This project is an online web application to be developed using HTML, CSS, JAVASCRIPT, ANGULAR AS A Front-end, and Strapi, Javascript to develop custom controllers and API's and MySQL database as a backend server.

- Database Design(Strapi)
- HTML
- CSS
- JAVASCRIPT
- ANGULAR
- BOOTSTRAP

## System Requirements:

### HARDWARE INTERFACE:

- OPERATING SYSTEM: WINDOWS 11 64 BIT
- HARD DISK: 94.1 GB
- RAM: 8 GB
- PROCESSOR : INTEL(R) CORE(TM) I3-4005U CPU @ 1.70GHZ 1.70 GHZ

### SOFTWARE INTERFACE:

- An OS is capable of running a modern web single application that supports an angular version in VsCode.
- Back-end: Strapi Open-Source Contribution.
- Front-end: HTML, CSS, Javascript and VSCODE and Angular 15, Node 12.18.0.

## Login Page

### Login

LOGIN

[Forgot Password?](#)

## Customer Page

### Open Activities

Due Today

All Open Activities

### Reports

Customers

Opportunities

### My Profile

Thwisha Amin

thwisha.amin@coworkssolutions.com

LOGOUT

### Customer Details

NEW CUSTOMER

Filter By

Select City

Select Type

Select Status

Select Company

2023

Company Name

Type

City

Status

Opportunity Count

☐

KVG Industries

MEP

Belgaum

Identified

2

☐

Shlok Enterprise

SI

Mangalore

Identified

1

☐

Shet organics

MEP

Bangalore

Identified

1

<

1

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## Opportunity

### Open Activities

Due Today

All Open Activities

### Reports

Customers

Opportunities

### My Profile

Thwisha Amin

thwisha.amin@coworkssolutions.com

LOGOUT

### All Opportunities

Export

SCHEDULE ACTIVITIES

Filter By

Select Location

Select Industry Type

Select Status

Select Project Name

Select Customer

Project Name

Description

Status

Industry

Location

Project Value

Opportunity Type

Customer Name

Action count

No data

<

1

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## Open Activity

### Open Activities

Due Today

All Open Activities

### Reports

Customers

Opportunity

### My Profile

Thwisha Amin

thwisha.amin@coworkssolutions.com

LOGOUT

### All Open Activities

Export

Activity Date

Action items

Pre. Activity Date

Project Name

EndCustomer Contact person

EndCustomer Contact Number

Status

12-04-2023

Connect with...

Not available

Acquire 123

Varadh M

9889899890

Pending

04-04-2023

Finalize the p...

03-04-2023

Acquire 123

Anand Verma

9889899890

Pending

<

1

>



## Schedule Activity on Opportunity

The screenshot shows the 'All Opportunities' page with a 'Schedule Activity' modal open. The modal contains the following fields:

- Project Name:
- Activity Date:
- Activity Type:
- Action Item:

The modal also has a close button (X) and a 'SCHEDULE ACTIVITIES' button. The background shows a table of opportunities with columns: Project Name, Description, Opportunity Type, Customer Name, and Action count.

## Update Activity/Schedule Next Activity

The screenshot shows the 'All Open Activities' page with a 'Fill Activity Details' modal open. The modal contains the following fields:

- Project Name:
- Activity Date:
- Activity Items:
- Remarks:
- Upload Attachment:
- Do you want to schedule next?: ☐
- Next Activity Date:
- Next Activity Type:
- Next Activity Items:

The modal also has a close button (X), an 'Export' button, and a 'SUBMIT' button. The background shows a table of activities with columns: Activity Date, Project Name, Customer Contact number, and Status.

## Create Opportunity On customer

The screenshot shows the 'Customer Details' page with a 'Fill opportunities Details' modal open. The modal contains the following fields:

- Project Name:
- Description:
- Status:
- Industry:
- Location:
- Project Value:
- Opportunity Type:
- Interested Products:
- EndCustomer Name:
- EndCustomer email:
- EndCustomer Contact Number:

The modal also has a close button (X), a 'NEW CUSTOMER' button, and a 'SUBMIT' button. The background shows a table of customers with columns: Company Name, Location, and Opportunity Count.



# My Role

My Role in this Project is as Backend Developer. Using Strapi to create custom Controllers and Database Contents for the Application. MySQL as Database. Strapi and Javascript to Customize the Controller and Creating API's.

Creating Database and Managing the Data through paths and Routes.



# Intended Audience & Future Scope

## Intended Audience:

- CRM is mainly intended to serve the Employees. Maintain the relationship between the customer and Employee.

## Future Scope:

- Employees get notification of their pending activity prior day so they can complete the call/activity.
- Employees need not check/remember what tasks they have as they get a notification.
- Reduced the inbox/emails regarding calls/activities hence saves time.

# Conclusion

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty. However, in order to be successful in these aims, the different company departments have to work together and use measures in a coordinated fashion. This purpose is achieved via a customer database which is analyzed and updated using CRM software. This approach will be of particular interest to companies operating in highly competitive markets where it is difficult to attract new customers.

# References

- Strapi Documentation.
- Angular Dcoumentation
- <https://docs.strapi.io/>
- <https://angular.io/docs>
- <https://www.w3schools.com/js/DEFAULT.asp>

# Thank You.