PROJECT:- ZOHO CRM

DOMAIN:- CRM (Customer Relationship Management)

Duration:- 14 months - 2.5 years

1.> What is Domain?

Ans:- Domain is a particular **B**usiness **F**ield OR

Domain is a particular **A**rea of **E**xpertise.

Types of Domains:-

a:> CRM Domain /Sales & Marketing

b:> Banking Domain

c:> Manufacturing Domain / ERP (enterprise resource planning)

d:> Education & Research

e:> Healthcare Domain

f:> E-commerce Domain/ Retail Domain

**ZOHO CRM:-> Is a B2B Application and it is a medium level application.

Types of CRM available in market

a:> ZOHO CRM

b:> ORACLE CRM

c:> SALESFORCE CRM

d:> AMDOCS CRM

e:> PeopleSoft CRM

CRM DOMAIN EXPLANATION:

**HP is a laptop manufacturing company who are new to business, where they want to sell their product so the company decided to open a showroom and place a "Store Manager / Sales Manager" with a team of sales executives.

**Company will assign 150 laptops for this month. In order to achieve the target, the sales manager will come up with several strategies [TV Ads, Expo, Banner ads].

This Strategies we will call it as **CAMPAIGN**.

**Now the sales manager will select Expo as a Campaign and decide the place and assign tasks and events to the sales executives. Here the "TASK" is official where the "EVENT" is unofficial.

**And the sales manager will give the target of 2000 people data during the CAMPAIGN 1500 people visited the Campaign, to see the demo of the product, where one of the sales executives is collecting their data

This data we call it "**LEADS**" data.

Once after Campaign is completed the Lead data is taken to showroom, and these data are stored in a software, such that "CRM Software**"

**After storing data few sales executives start calling the Leads and check their status.

** Out of 1500 Leads, 600 Leads shown interest to visit the showroom & sales executives starts collecting this "600 Leads data"

** Out of this 600 leads, 200 leads agreed to buy the product, we call them as "**POTENTIAL Leads**".

** Showroom will provide quotation , for all 200 potentials which consists of product details (**Product Specifications**) and price book (Least offered price).

** Considering all 200 potential leads are ready to purchase the product, Sales manager will look into availaibility of the product.

** Since only 150 laptops are available, then showroom will generate "**Purchase order**" which consist of "Re-order Level" (50), and send it to manufacturing unit.

** Showroom will generate invoice for 150 laptops and deliver them to the customers.

** Remaining '50' customers they will generate "**sales Order**".

** Once after the order of '50' laptops are ready the showroom will generate invoice & deliver the product to customers.

*********** **This is how CRM Domain works** *************

" **Modules in my Project** "

1:> ADMIN

2:> User (not implemented)

**** Workflow of CRM Project (admin workflow)**

1:> Admin can create "CAMPAIGN"

a:> Admin can create "Task"

b:> Admin can create "Event"

2:> Admin can create "LEAD"

3:> Admin can create "CONTACT"

4:> Admin can create "ACCOUNT"

5:> Admin can create "POTENTIAL"

6:> Admin can create "PRODUCT"

7:> Admin can create "PRICEBOOK"

8:> Admin can create "QUOTATION"

9:> Admin can create "PURCHASE ORDER"

10:> Admin can create "SALES ORDER"

11:> Admin can create "INVOICE"

" **Admin Creating New Campaign** "

1.> Login to the app and click on 'Campaign' tab.

2.> Campaign list page will be displayed.

3.> Click on new Campaign button, create new Campaign page.

4.> Now enter all the details.

[Camp name, type, start & end date, status, actual cost, num sent, description] = click on **SAVE**.

**After saving, on the left hand side of the screen, we can see the data flow in Recent List.

5:> Campaign details page will be displayed.

6:> Now click on Campaign Major tab;

Campaign list page will be displayed with newly created Campaign.

*************** **1ST OPERATION** *****************

" **Edit** to Campaign details "

1:> Login to the application. Homepage will be displayed

2:> Click on Campaign major tab.

3:> Campaign list page will be displayed.

4:> Select our Campaign and click on the edit button.

5:> "Edit Campaign" page will be displayed.

6:> we can change the status or required details and save.

*************** **2ND OPERATION** *****************

" How to **Delete** Campaign "

1:> Login to the application. Homepage will be displayed

2:> Click on Campaign major tab.

3:> Campaign list page will be displayed.

4:> Select any Campaign, click on it, Campaign details page will be displayed.

5:> Select delete button, a "pop-up" warning message will be displayed. Click on “ok”

6:> Campaign list page will be displayed and

RESULT: Selected Campaign will be deleted.

*************** **3RD OPERATION** *****************

" How to **Clone** the Campaign " (Clone means "duplicate" creation, Clone it is a same type of Campaign).

1:> Login to the application. Homepage will be displayed

2:> Click on Campaign major tab.

3:> Campaign list page will be displayed.

4:> Select any Campaign, click on it, Campaign will be displayed.

5:> Select Clone button, Save, Campaign information page will be displayed.

6:> Click on Campaign major tab, Campaigns list page will be displayed.

7:> RESULT:- Duplicates of Clone will be displayed in the Campaign list page.

*************** **4TH OPERATION** *****************

" How to do "**Print Preview** "

1:> Login to the application. Homepage will be displayed

2:> Click on Campaign major tab.

3:> Campaign list page will be displayed.

4:> Select any Campaign and click on it.

5:> Campaign details page will be displayed.

6:> Click on the "Print Preview" button.

7:> We will get a print preview page displayed with Campaign details.

8:> Click on the Print Page.

9:> Print dialog page will be displayed.

10:> Click on OK, we will get the hardcopy of the print preview with Campaign details.

*************** **5TH OPERATION** *****************

** How to 'Restore' deleted Campaign? **

1:> Login to the application. Homepage will be displayed

2:> Click on Campaign major tab.

3:> Campaign list page will be displayed.

4:> Click on Recycle bin - deleted list page will be displayed.

5:> Select the checkbox and click on the restored button.

6:> Click on campaign major tab

7:> On the Campaign list page, the deleted Campaign will be restored.

8:> It should be restored.

*************** **6TH OPERATION** *****************

** How to create task in Campaign **

1:> Login to the application. Homepage will be displayed

2:> Click on Campaign major tab.

3:> Campaign list page will be displayed.

4:> click on campaign name link , Campaign details page will be displayed.

5:> Under description information, select New Task.

6:> New Task page will be displayed.

7:> Fill the required details:

*Subject (Demo)

*Description (Give demo to Customer who comes to view the laptop)

*Due date (Calendar)

*Status (Select based on activity)

*Priority (Select as per activity) - after giving details click on SAVE.

8:> Tasks should be created & displayed in the "Open activities" section.

*************** **7TH OPERATION** *****************

** How to create "**New Event**" **

1:> Login to the application. Homepage will be displayed

2:> Click on Campaign major tab.

3:> Campaign list page will be displayed.

4:> Select any Campaign and click on that Campaign details page should be displayed.

5:> under description information fill the required details:-

** Open Activities -----> Create new Event:- New Event page will be displayed.

** Event information:- Fill = Subject, Description, date & time, duration and venue = **Save**.

*Subject:- Event

*Description:- you have to conduct some events in order to attract the crowd and later guide to demo area.

* Date & Time :- Date and time

* Duration:- Ex:- 2 hrs 30 min

* Venue:- Any Mall. and click on save

6:> event should be created & displayed in "Open activities" section.

*************** **8TH OPERATION** *****************

** How to edit "Lead" **

1:> Login to the application. Homepage will be displayed

2:> Click on the Lead major tab.

3:> Lead list page will be displayed.

4:> Click on Lead name, lead details page will be displayed.

5:> Click on the Edit button, edit the lead page , and it will be displayed.

6:> Make the changes and click on "Save", the Lead details page will be displayed, with changes.

*************** **9th OPERATION** *****************

** How to delete "Lead" **

1:> Login to the application. Homepage will be displayed

2:> Click on the Lead major tab.

3:> Lead list page will be displayed.

4:> Click on delete button, we get "warning Pop-Up" ("Ok" or "Cancel")

5:> Click on "OK", - Again the lead list page will be displayed.

6:> in the Recycle bin we can see the deleted "Lead".

*************** **10th OPERATION** *****************

** How to create LEAD?**

1:> Login to the application. Homepage will be displayed

2:> Click on Leads major tab.

3:> Leads list page will be displayed.

4:> Create "New lead"

5:> Fill the required details:-

** First and last name

** Company (this is a defect since, it is not compulsory)

**Designation ** Email ** Phone-Mobile - Lead Source (need update)

**Lead status (as per drop list) ** Industry ** No. of Emp

** Annual Revenue ** Rating ** Campaign Source **Address

** Description (After calling customers, we have to enter the customers response, whether he is interested or need more info or something else)

*************** **11th OPERATION** *****************

** How to 'Clone' lead**

1:> Login to the application. Homepage will be displayed

2:> Click on Leads major tab.

3:> Leads list page will be displayed.

4:> Select any lead, lead details page will be displayed.

5:> Click on the "Clone" button, "Clone Lead" page should be displayed.

6:> do changes which are required. "No. of Employee = 1 "

7:> Description information (" He is thinking of buying a printer ").

8:> and click on save button clone lead page will be displayed

*************** **12th OPERATION** *****************

** How to "convert lead" to "Potential lead" **

******Account will be created from Lead Data flow and also contacts too.*****

1:> Login to the application. Homepage will be displayed

2:> Click on Leads major tab.

3:> Leads list page will be displayed.

4:> Click on "Convert Lead", and fill (Potential name, Closing date and Stage and click on SAVE).

*************** **13th OPERATION** *****************

** How to 'Find and Merge Duplicate' **

1:> Login to the application. Homepage will be displayed

2:> Click on Leads major tab.

3:> Leads list page will be displayed.

4:> Click on any lead.

5:> On lead details page, click "Find and Merge Duplicate" button, select any leads and select check box.

6:> Click on Merge - "warning msg" - click on "OK"

7:> Lead details page will be displayed.

*************** **14th OPERATION** *****************

** How to create "Account" **

1:> Login to application. Homepage will be displayed.

2:> Click on the Account major tab, and the Account list page will be displayed.

3:> Click on "New Account", page will be displayed and fill in all the required details.

[**Acc Name** Rating--> Active, **Acc site--> icici bank **Phone:-12345

**Parent Acc **Website ** Acc No:- 1234567

** Ticker Symbol

**Acc Type:- Customer ** Ownership:- Private ** Industry:- Storage Equipment

** Employees: 50 **Annual Revenue:- 50,000,000.00 **SIC Code:-

Address Information:- fill the address. -----> click on **SAVE.

*************** **15th OPERATION** *****************

** How to create "Contacts" **

1:> Login to application. Homepage will be displayed.

2:> Click on Contacts major tab, Contacts list page will be displayed.

3:> Click on "New Contact" --> Create Contact page will be displayed.

4:> fill all the required fields.

[**First name: and last name: ** Lead Source: Advertisement **Acc name:- CG Group

**Contact:- number **Email **vendor name ** Department **Title **Home Phone

**Phone:-888 **Fax **Other Phone:-8888 **DOB ** Mobile

** Assistant Phone (only if its company) ** Assistant **Address ----. **SAVE**.

*************** **16th OPERATION** *****************

** How to create "Potential" **

1:> Login to application. Homepage will be displayed.

2:> Click on the Potential major tab, and the Potential list page will be displayed.

3:> Click on "New Potential --> Create Potential page displayed.

4:> Enter all the text fields:-

** Potential Name:- **Acc Name:- **Next step(extra implementation)

**Closing date **Stage

** Probability:- (if customer will buy product for 90% sure, but he is expecting some negotiation.) -----------. **SAVE**.

*************** **17th OPERATION** *****************

** How to create "Product" **

1:> Login to application. Homepage will be in displayed.

2:> Click on Product major tab, Product list page will be displayed.

3:> Click on "New Product" - Create product page should be displayed.

4:> Fill the required details and SAVE.

5:> Product details page will be displayed.

6:> Same as trying with edit, clone, print preview, delete options.

*************** **18th OPERATION** *****************

** How to create "Pricebook" **

1:> Login to application. Homepage will be displayed.

2:> Click on the Pricebook major tab, and the Pricebook list page will be displayed.

3:> Click on "New Price book" ---- "Create Price Book", page should be displayed.

****Price book Name

****Description and click on **SAVE**.

4:> Price book details, page should be displayed.

----- Now click on " Add Product" button add "Product to 'Pricebook' page will be displayed and then select the product and click on add, product will be added to Price book. "PriceBook page will be displayed." *While adding "product" - need to add 'List Price'.

*************** **19th OPERATION** *****************

** How to create "Quotation" **

1:> Login to application. Homepage will be displayed.

2:> Click on Quotation major tab, Quotation list page will be displayed.

3:> Click on "New Quote" - "Create Quote" page should be displayed

4:> fill the required fields.

**Potential Name **Subject **Valid fill

**Account name-->click on 'Account Name look up icon'

----the list which was created earlier will be displayed.

----Select one account which was created by me

----Page will be refreshed and "Address info" get "updated" automatically

***Next, click on 'Product details' lookup icon

--Select one product which was created by me earlier in the product tab.

--So Product Details text fields will be filled automatically.

--Select "List Price" - Selling Price will be updated.

--Here if you change the 'Qty's' the subtotal and Grand total will be updated.

-- Terms and Conditions:- Mention last dates, offers etc.

-- Description:- ex:- Price is negotiable etc.

*************** **20th OPERATION** *****************

** How to create "Purchase Orders" [Given to manufacturing unit]**

1:> Login to application. Homepage will be displayed.

2:> Click on Purchase order major tab, Purchase order list page will be displayed.

3:> Click on "New Purchase order" - "Create purchase order" page will be displayed.

4:> Fill the required details:-

** Purchase order no.   ** Subject   **Contact Name

---Select one contact created by me in the contact page.

**Purchase date   ** Due date   ** Status.

--Address - Enter manually, since account details are not there here.

--Click on Product details--> Icon--> Select one Product created by me--> List price

--> select one "sales price" and change the "QTY"

Sub Total

====== Price Changes

Grand Total

--> terms and conditions and ----> Description Information.

AND CLICK ON SAVE . PURCHASE ORDER DETAILS PAGE WILL BE DISPLAYED

************** **21ST OPERATION** ****************

** How to create "Sales Orders" [Given to customer]**

1:> Login to application. Homepage will be displayed.

2:> Click on the Sales order major tab, and the Sales order list page will be displayed.

3:> Click on 'New Sales Order' - 'Create Sales Order' page will be displayed.

4:> Fill the required details:-

** Potential   **Subject   **Due date

**Quote Name-->it will be refreshed and the address will be filled.

**Contact name -->will be taken automatically

**Product details and subtotal, (Grand total filled automatically).

**Terms and Conditions ** Description (will be filled automatically.

And click on save . sales order details page will be displayed

*************** **22nd OPERATION** ******************

** How to create "Invoices" [Given to customer]**

1:> Login to application. Homepage will be displayed.

2:> Click on Invoice major tab, Invoice list page will be displayed.

3:> Click on "New Invoice" button.

4:> Create invoice page will be displayed.

5:> Fill the required details:-

** Sales order ----> After selecting we have a data flow to (Subject, due date, account name, address and product details and Sub & Grand Total, Terms and conditions, Description.)

6. **Save**.

MOSTLY ASKED INTERVIEW QUESTIONS

AGILE –

1. What is your project duration?
2. What is your release duration?
3. What is the test cycle duration?
4. How frequently you got build?
5. What is sprint duration?
6. How many releases have you given to customer?
7. How many builds have you tested?
8. How many testcases can you write in a day?
9. How many testcases have you written in your project?
10. How many testcases are there in your project?
11. How many defects have you found in your project?
12. How many defects are there in your project?
13. How many testcases can you execute in a day?
14. How many testcases can you review in a day?
15. What is your team size?
16. How they handle agile in your company?
17. Explain me agile in your company?
18. Explain scrum meeting?
19. What is your daily work routine?
20. What you did in your free time in your company?
21. Explain sprint planning meeting?
22. What are the challenges you faced while testing?
23. Can you list dependency modules present in your project?
24. Can you write functional/integration/system scenarios on your project?
25. Explain your project?
26. Tell me about yourself?
27. How many blocker, critical, major, minor defects have you found in your project?
28. How many blocker, critical, major, minor defects are there in your project?

TESTRAIL:

1. How do you handle agile in testrail?
2. How do you create milestones (release) and sub milestones (sprints)?
3. How do you prepare testcase folders?
4. How do you write testcases in testrail?
5. How do you create testcase execution folders in testrail?
6. How do you execute testcase in testrail?
7. What are the execution status in testrail?(untested, passed, blocked, retest, failed)
8. What templates you used to write testcases in testrail?

JIRA:

1. How to search duplicate defects in jira?
2. How to do advance search in jira?
3. How to log defect in jira?
4. What is the default defect status in jira?
5. What are all the resolutions (status) present in jira?