

**EX NO:**

**DATE :**

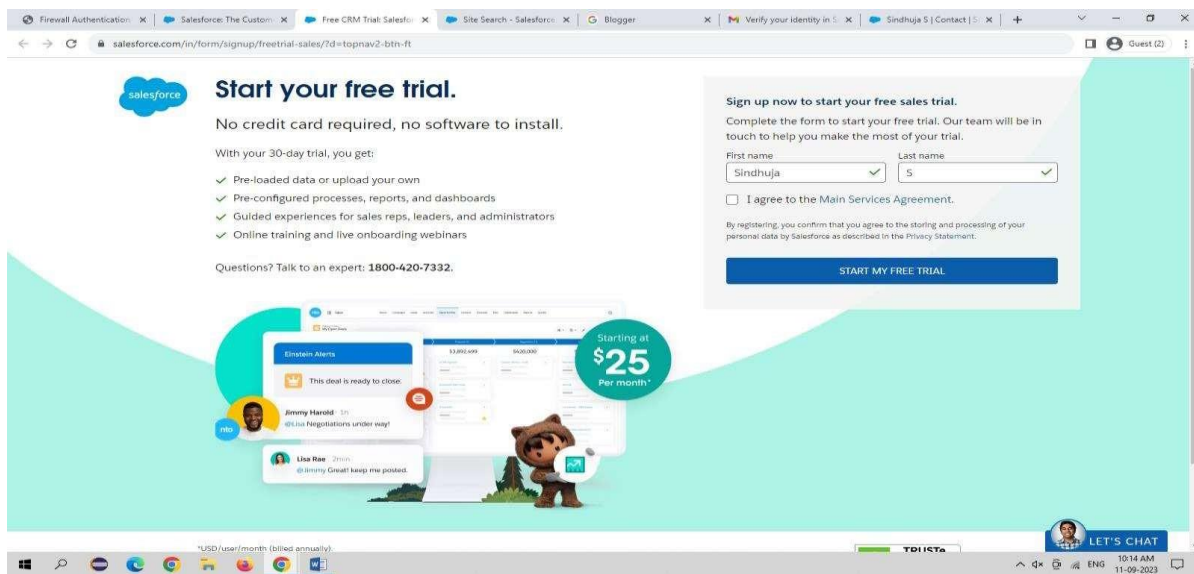
## **CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM**

**AIM:**

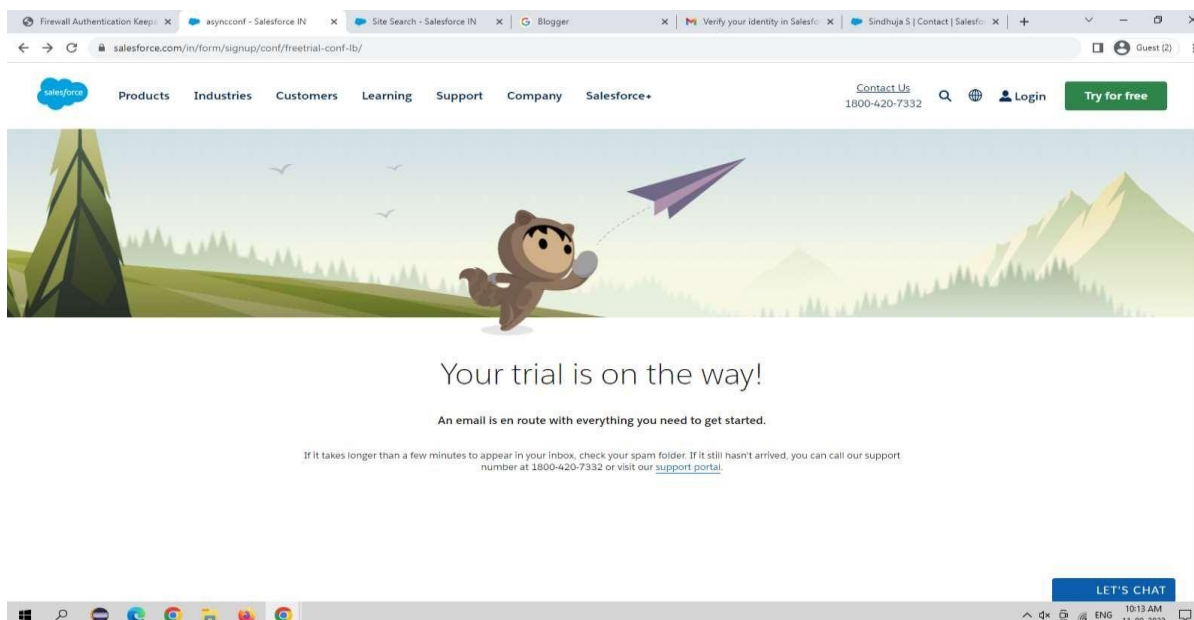
To Create a Customer Relationship Management System (CRM) using salesforce.com portal.

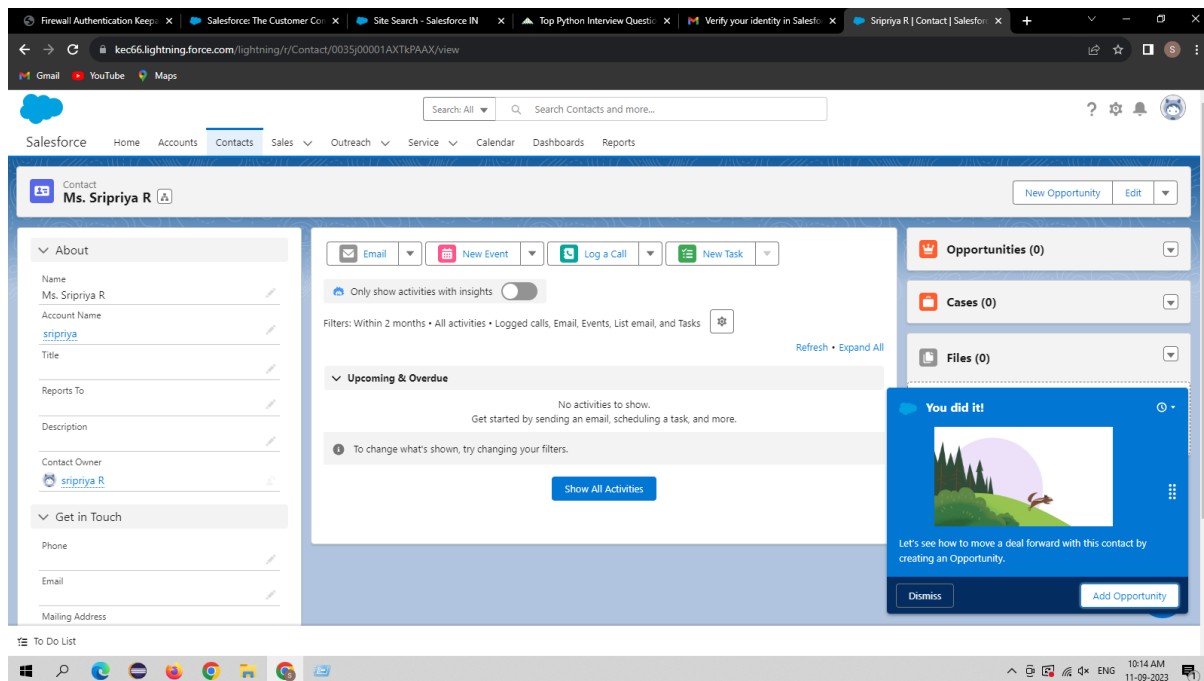
**STEPS :**

**STEP 1:** Go to Salesforce.com portal.

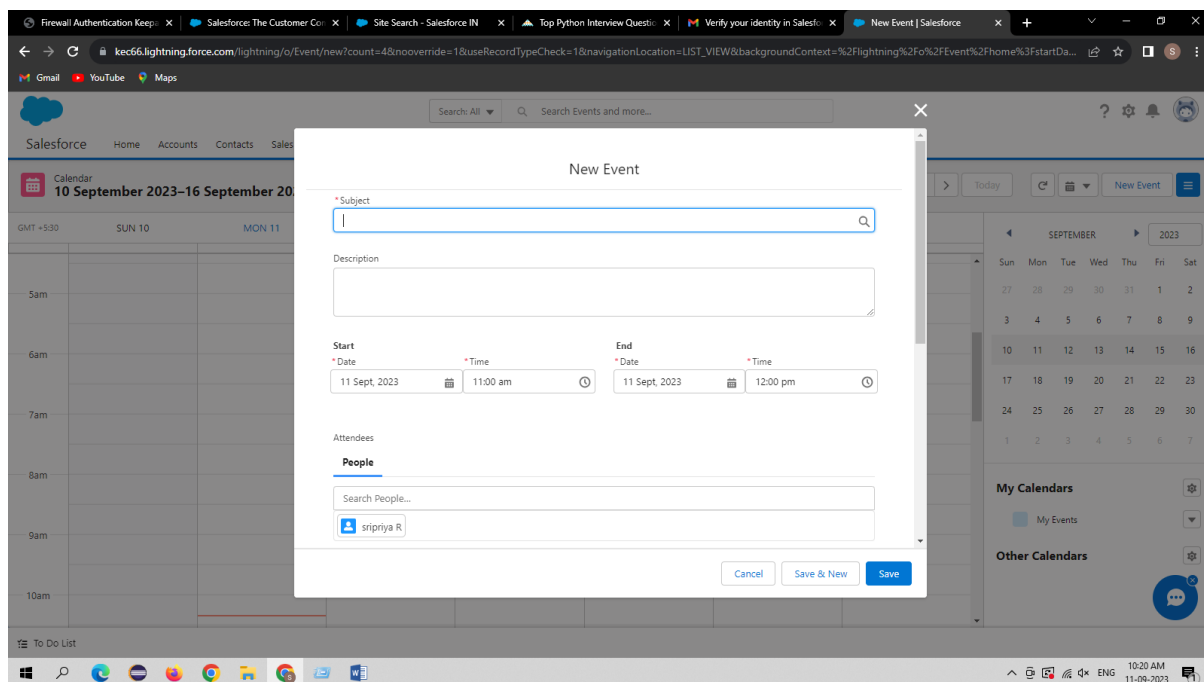


**STEP 2:** Sign up your account and then login the Salesforce portal.

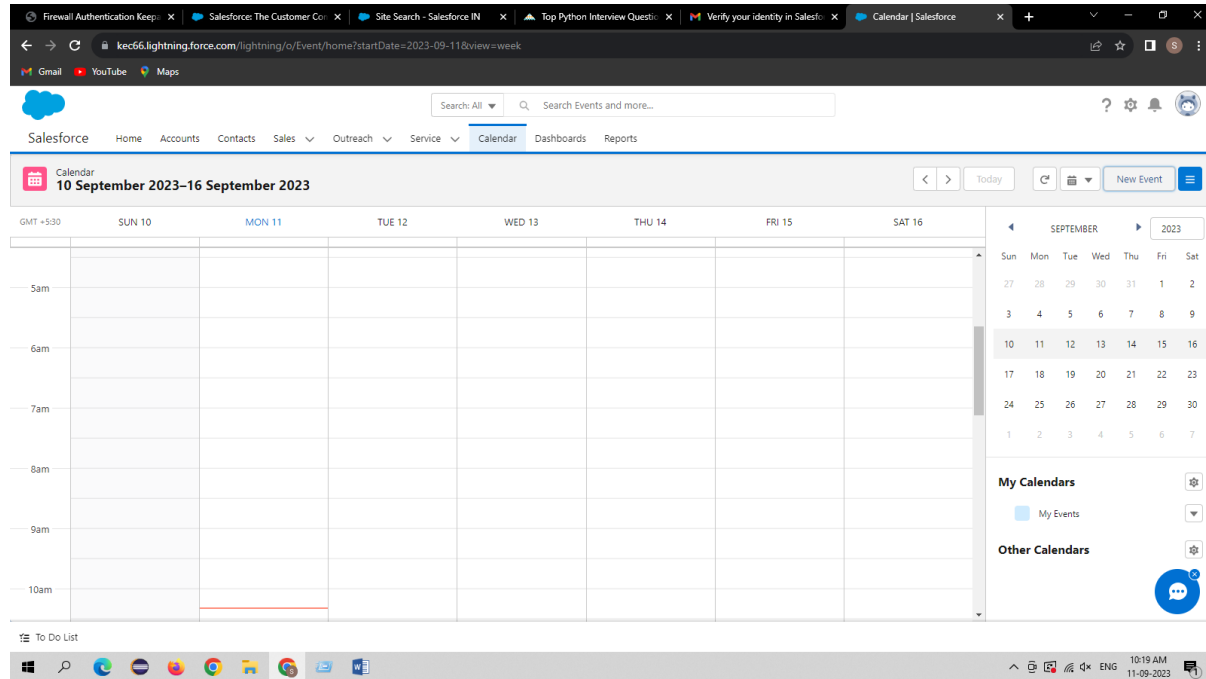




**STEP 3:** In Salesforce portal go to the contacts, In that select new event.

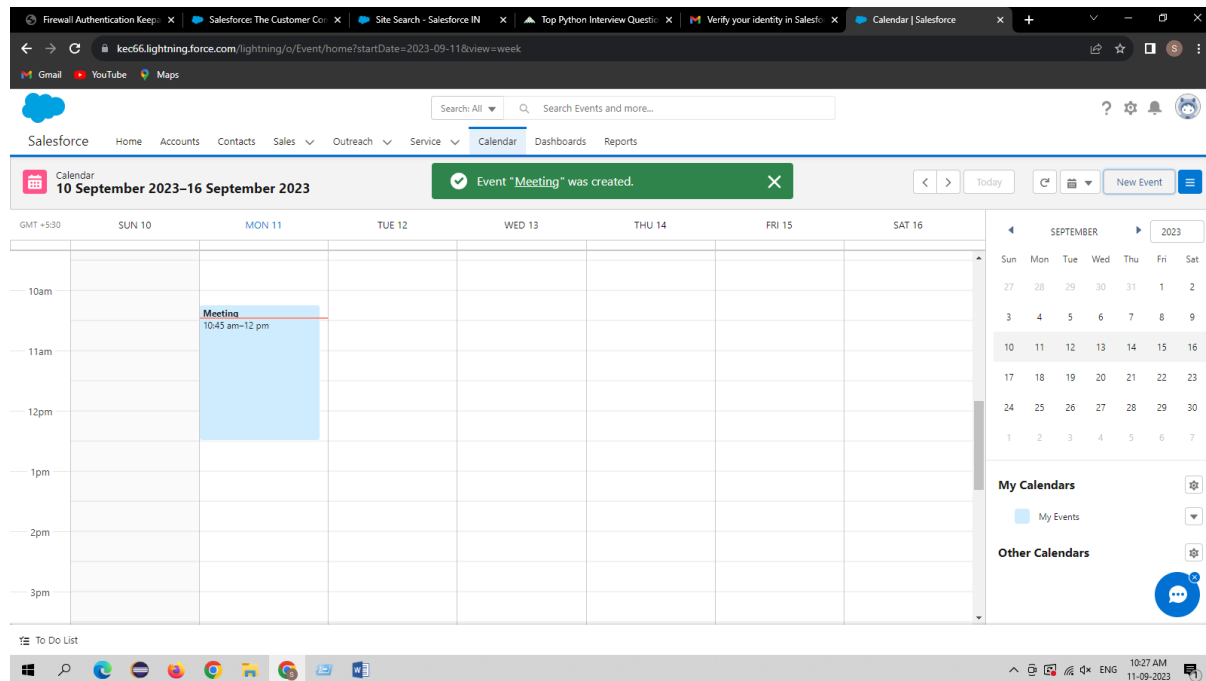


## STEP 4: Click the calendar to set the remainder.



The screenshot shows the Salesforce user interface with the 'Calendar' tab selected. The calendar displays a weekly view for the period from Sunday, September 10, 2023, to Saturday, September 16, 2023. The time slots range from 5am to 10am. A 'New Event' button is located in the top right corner of the calendar panel. The right sidebar shows the 'My Calendars' section with 'My Events' selected, and a 'To Do List' is visible at the bottom left.

## STEP 5: Click on the particular date to get the remainder on particular time.



The screenshot shows the Salesforce user interface with the 'Calendar' tab selected. A green notification bar at the top states "Event 'Meeting' was created." The calendar displays a weekly view for the period from Sunday, September 10, 2023, to Saturday, September 16, 2023. A meeting event titled "Meeting" is created for Monday, September 11, 2023, from 10:45 am to 12 pm. The right sidebar shows the 'My Calendars' section with 'My Events' selected, and a 'To Do List' is visible at the bottom left.

## STEP 6: Click on the report to view the account details.

The screenshot shows the Salesforce Report Builder interface. The report is titled "New Contacts & Accounts Report" and is in preview mode. The preview shows a table with columns: Salutation, First Name, Last Name, Title, Account Name, Mailing Street, Mailing City, Mailing State/Province, Mailing Zip/Postal Code, Mailing Country, Phone, and Fax. The data row shows: Ms. Sriprya R, -, sriprya, -, -, -, -, -, -, Phone, Fax.

REPORT  
New Contacts & Accounts Report

Previewing a limited number of records. Run the report to see everything.

	Salutation	First Name	Last Name	Title	Account Name	Mailing Street	Mailing City	Mailing State/Province	Mailing Zip/Postal Code	Mailing Country	Phone	Fax
1	Ms.	Sriprya	R	-	sriprya	-	-	-	-	-	Phone	Fax

## STEP 7: Click on the enable editing button to update the details.

The screenshot shows the Salesforce Report Builder interface. The report is titled "New Contacts & Accounts Report" and is in edit mode. The preview shows a table with columns: Salutation, First Name, Last Name, Title, Account Name, Mailing Street, Mailing City, Mailing State/Province, Mailing Zip/Postal Code, Mailing Country, Phone, Fax, Mobile, Email, and Account Owner. The data row shows: Ms. Sriprya R, -, sriprya, -, -, -, -, -, -, Phone, Fax, Mobile, Email, sriprya R.

Report: Contacts & Accounts  
New Contacts & Accounts Report

Report "New Contacts & Accounts Report" was saved

Enable Field Editing

Total Records  
1

	Salutation	First Name	Last Name	Title	Account Name	Mailing Street	Mailing City	Mailing State/Province	Mailing Zip/Postal Code	Mailing Country	Phone	Fax	Mobile	Email	Account Owner
1	Ms.	Sriprya	R	-	sriprya	-	-	-	-	-	Phone	Fax	Mobile	Email	sriprya R

<b>Conduct of the experiment</b>	
<b>Observation</b>	
<b>Record</b>	
<b>Viva</b>	
<b>Total</b>	

### **RESULT:**

Thus, the creation of Customer Relationship Management System (CRM) using salesforce.com portal, is executed successfully.