

## **Customer Relationship Management(CRM)**

The concepts, procedures, and rules that a corporation follows when communicating with its consumers are referred to as customer relationship management (CRM). The primary goal of CRM is to increase customer loyalty and in turn improve business profitability. From the viewpoint of the Management, CRM can be defined as an organized approach of developing, managing, and maintaining a profitable relationship with customers.

### **History**

The concept of customer relationship management started in the early 1970s, when customer satisfaction was evaluated using annual surveys. Microsoft CRM 1.0 was released in January 2003, with name Microsoft Business Solutions Customer Relationship Management 1.0. But soon the name was changed to Microsoft CRM 1.0. Microsoft CRM. The latest update called the 'October Update' was released in October 2018 and was called Dynamics 365, with version number 9.1.0.0035.

## **Cloud Computing Service Model**

There are three types of service models:-

- (i)SaaS: Software as a Service
- (ii)PaaS: Platform as a Service
- (iii)IaaS: Infrastructure as a Service

### **(i)SaaS:-**

Software as a Service, also known as cloud application services, represents the most commonly utilized option for businesses in the cloud market. SaaS utilizes the internet to deliver applications, which are managed by a third-party vendor, to its users. A majority of SaaS applications run directly through your web browser, which means they do not require any downloads or installations on the client side. Ex:- MS Dynamics 365, Dropbox, GoTo Meeting, etc.

### **(ii)PaaS:-**

Cloud platform services, also known as Platform as a Service (PaaS), provide cloud components to certain software while being used mainly for applications. PaaS delivers a framework for developers that they can build upon and use to create customized applications. All servers, storage, and networking can

be managed by the enterprise or a third-party provider while the developers can maintain management of the applications.Ex:- Heroku,Google App Engine,OpenShift,etc.

### **(iii)IaaS:-**

Cloud infrastructure services, known as Infrastructure as a Service (IaaS), are made of highly scalable and automated compute resources. IaaS is fully self-service for accessing and monitoring computers, networking, storage, and other services. IaaS allows businesses to purchase resources on-demand and as-needed instead of having to buy hardware outright. Ex:-AWS,Rackspace,DigitalOcean,etc.

## **CRM v/s ERP**

CRM is software that manages all the ways a customer interacts with a business.Initially, CRM features were first developed for sales departments and were sometimes known as sales force automation (SFA).

Enterprise resource planning (ERP) evolved out of material requirements planning (MRP), which was a way for manufacturers to understand and manage all the resources needed to operate a successful business.

## **What is Dynamics 365?**

Dynamics 365 is a set of interconnected, modular Software-as-a-Service (SaaS) applications and services designed to both transform and enable your core customers, employees, and business activities. It combines CRM and ERP capabilities, integrating your data, business logic, and processes. So,

instead of having separate, siloed sales and marketing functions, Dynamics 365 offers automated, integrated, and intelligent sales and marketing capabilities that efficiently connect, prioritize, and convert leads into paying customers. It is built on Microsoft Azure, which offers both a trusted platform and a broad ecosystem of services.

## **Dynamics 365 Essentials for IT - Introduction**

Industries have seen customer relationship management (CRM) become one of the most essential tools for business growth. Dynamics 365 is an umbrella marketing term describing several platforms and functional

products. The various applications under this branding include the following:

(i) Sales

(ii) Customer Service

(iii) Field Service

(iv) Human Resource

(v) Finance and operation

(vi) Project Service Automation

(vii) marketing