

→ Demonstrate the SAAS application
(Demonstrate CRM application using suitable platform).

Q) what is SAAS?

→ SaaS stands for Software as a service.

→ It is a cloud computing model where software applications are provided to users over the internet users access through a web browser, eliminating the need for installation and maintenance on their local machines.

Benefits:

- Cost of savings.
- Scalability.
- Accessibility.
- Easy updates.

Examples of SAAS:

- cloudfinary.
- Figma.
- Adobe, DocuSign.

Q) what is CRM?

Customer relationship management (CRM) is a strategic approach that business use to manage interactions and relationships with current

potential customers. It involves utilizing technology to organize, automate and synchronize sales, marketing, customer service and technical support. The primary focus of CRM is to enhance customer satisfaction and loyalty by understanding their needs and preferences better.

- Q) → How business use CRM to manage customer relationships and sales?
- Streamlining customer data management
 - Targeted marketing and sales campaigns.
 - Data-driven decision-making for sales strategy.

Overview of Key CRM features.

- Contacts
- Deals
- Pipelines
- Automation

- Q) → Multi-tenancy in SaaS

It means a single CRM application instance serves multiple organizations.

data isolated.

Benefits.

- i) Lower cost.
- ii) Easy scalability
- iii) automatic updates for all tenants.
- iv) Faster deployment without separate installations.

Zoho CRM

Home

Reports

Modules

Search

Leads

Contacts

Accounts

Deals

Tasks

Meetings

Calls

Campaigns

Documents

Visits

Projects

Welcome Pratheeth S Angari

My Open Tasks

No Tasks found.

My Meetings

No Meetings found.

Today's Leads

My Deals Closing This Month

Feedback on New UI

25°C

Search

ENG

35%

11:42

The screenshot shows the Zoho CRM home interface. On the left is a dark sidebar with navigation links for Home, Reports, Modules, and various modules like Leads, Contacts, Accounts, Deals, Tasks, Meetings, Calls, Campaigns, Documents, Visits, and Projects. The main area has a light blue header with the title 'Welcome Pratheeth S Angari'. Below the header are four main sections: 'My Open Tasks' (empty), 'My Meetings' (empty), 'Today's Leads' (empty), and 'My Deals Closing This Month' (empty). A search bar at the top right contains the placeholder 'Search records'. The bottom of the screen shows a Windows taskbar with icons for Start, Search, File Explorer, Task View, Edge, and Google Chrome, along with system status indicators for weather, language, battery, and time.

Zoho CRM Home

Welcome Pratheeth S Angari

Pratheeth S Angari's Home

My Open Tasks

Subject	Due Date	Status	Priority
Register for upcoming CRM Webinars	03/02/2026	Not Started	Low
Refer CRM Videos	05/02/2026	In Progress	Normal
Competitor Comparison Document	01/02/2026	Not Started	Highest
Get Approval from Manager	02/02/2026	Not Started	Low
Get Approval	04/02/2026	In Progress	Normal

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My Meetings

Title	From	To	Related To
Demo	03/02/2026 03:42 PM	03/02/2026 04:42 PM	Printing Dimensions
Webinar	03/02/2026 05:42 PM	03/02/2026 06:42 PM	Commercial Press (Sample)
TradeShow	03/02/2026 05:30 AM	04/02/2026 05:29 AM	Cheme
Webinar	03/02/2026 04:42 PM	03/02/2026 07:42 PM	Chanay (Sample)
Seminar	03/02/2026 03:42 PM	03/02/2026 05:42 PM	Carissa Kidman (Sample)

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Today's Leads

Lead Name	Company	Email	Phone
John Doe	ABC Corp	johndoe@abc.com	123-456-7890
Jane Smith	XYZ Inc.	janesmith@xyz.com	987-654-3210
Mike Johnson	Green Corp	mikejohnson@green.com	543-210-9876

My Deals Closing This Month

Deal Name	Amount	Stage	Closing Date
Project Alpha	\$50,000.00	Pending	03/02/2026
Project Beta	\$30,000.00	Negotiation	03/02/2026
Project Gamma	\$40,000.00	Final Review	03/02/2026

Feedback on New UI

25°C Sunny

Search

Windows Taskbar

11:44 03-02-2026

ENG IN 35%

The screenshot shows a software application window titled "Reports". The main header includes a search bar ("Search records") and various navigation icons (New, Calendar, Print, Settings, Help). Below the header, a sub-header displays "Top 10 Templates by Open Rate" with a timestamp "Updated less than a minute ago" and edit/collapse buttons. A filter section allows filtering by "Template Name" or "Date" with a "Clear" button. The main content area is a table with the following columns: TEMPLATE NAME, SENT, BOUNCED, TRACKED, BOUNCED AMONG TRACKED, OPENED, CLICKED, REPLIED, RECEIVED, SENT, BOUNCED, and TRACKED. A message "No Data Found" is centered below the table. The bottom of the screen features a taskbar with system icons (weather, search, file explorer, browser, etc.) and a battery status (34% 03-02-2026).

Modules

Search

Leads

Contacts

Accounts

Deals

Tasks

Meetings

Calls

Campaigns

Documents

Visits

Projects

Overview Timeline Last Update : 11:50 AM

Sage Wieser (Sample)

Task Information

Task Owner	Pratheeth S Angari
Subject	Research Methodology Assignment
Due Date	04/02/2026
Contact Name	Sage Wieser (Sample)
Related To	Truhlar And Truhlar (Sample) - Accounts
Status	Not Started
Priority	High
Created By	Pratheeth S Angari Tue, 3 Feb 2026 11:50 AM
Modified By	Pratheeth S Angari Tue, 3 Feb 2026 11:50 AM
Reminder	—

Info Conversations

Sage Wieser (Sample) Contact Send Email

Truhlar And Truhlar (Sample)

sage-wieser@noemail.invalid

555-555-5555

555-555-5555

More Info

Deal Summary + New

\$* Truhlar And Truhlar Atty's
Rs. 45,000.00
Needs Analysis . 04/02/2026

Open Activities + New

Feedback on New UI

Tasks ?

Help

?

Reports

Modules

Search

Leads

Contacts

Accounts

Deals

Tasks

Meetings

Calls

Campaigns

Documents

Visits

Projects

Filter

Sort

Create Meeting

...

Filter Meetings by

Search

System Defined Fil...

- Touched Records
- Untouched Records
- Record Action
- Related Records Action

Filter By Fields

- All day
- Check-In Address
- Check-In By
- Check-In City
- Check-In Country
- Check-In State
- Check-In Sub-Location

<input type="checkbox"/> Title	All	From	To	Related To	Contact Name	
<input type="checkbox"/>	Demo	03/02/2026 03:42 PM	03/02/2026 04:42 PM		Printing Dimensions	Donette Foller (Sample)
<input type="checkbox"/>	Webinar	03/02/2026 05:42 PM	03/02/2026 06:42 PM		Commercial Press (Sample)	Leota Dilliard (Sample)
<input type="checkbox"/>	TradeShow	03/02/2026 12:00 AM	03/02/2026 11:59 PM		Chernel	James Venere (Sample)
<input type="checkbox"/>	Webinar	03/02/2026 04:42 PM	03/02/2026 07:42 PM		Chanay (Sample)	Josephine Darakjy (Sa...
<input type="checkbox"/>	Seminar	03/02/2026 03:42 PM	03/02/2026 05:42 PM		Carissa Kidman (Sample)	
<input type="checkbox"/>	Attend Customer conference	03/02/2026 12:00 AM	03/02/2026 11:59 PM		Feltz Printing Service	Capla Paprocki (Samp...
<input type="checkbox"/>	CRM Webinar	03/02/2026 02:42 PM	03/02/2026 04:42 PM		Morlong Associates	Mitsue Tollner (Sampl...
<input checked="" type="checkbox"/>	CRM Webinar	03/02/2026 01:42 PM	03/02/2026 02:42 PM		Felix Hirpara (Sample)	
<input type="checkbox"/>	CRM Webinar	03/02/2026 01:42 PM	03/02/2026 02:42 PM		Benton	John Butt (Sample)
<input type="checkbox"/>	Meeting	03/02/2026 02:00 PM	03/02/2026 03:00 PM			

Total Records 10

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