Billing System using Salesforce

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Abstract: *The new method for developing and using cloud-based applications on the market is Salesforce. Salesforce provides Cloud-based services. services to their clients.The top customer relationship management platform is Salesforce (CRM). Salesforce CRM is an on-demand network approach that tailors the sources to its users. Several services, including availability, scalability, security, and performance, are offered by Salesforce CRM to its users. Salesforce assists organizations in obtaining current data and improving performance. Additionally, it offers B2B and B2C deliveries. It also offers protection to their customers' data while automating manual business workflow and rules. Moreover, it offers the ability to manage business flow subsystems and sales process subsystems.*

Keywords: Salesforce, Cloud based services, CRM, business, B2B, B2C, billing

I. INTRODUCTION

Every firm wants to be current in the market in the modern world. For the expansion of their businesses, they all wish to become familiar with the newest technologies. Customer relationships are crucial in business. Customer relations today resemble a one-stop shop. Salesforce offers you a platform for client relationship management for that reason. where you can interact with your customer very differently. We have developed a web application task and billing automation system for that purpose. TBAS offers a variety of services to its clients, including managing disorganized databases, monitoring client accounts, resolving issues, keeping track of cases, whether they are active or not, and offering chat rooms for communication. Many elements of the Salesforce CRM encompass numerous business operations, such as administration and automation. The legitimacy of the communication allows our customer to save significant time.

Any company that wishes to increase customer satisfaction must invest in a customer relationship management (CRM) platform. Similar to this, excellent opportunities help a business achieve high sales performance [16].

The purpose of this paper is to present a web application on the Salesforce platform, a cloud-based customer relationship management (CRM) system, which assists customers in logging their issues, managers in reviewing the issues and assigning them to the appropriate department, and once the issue has been resolved, we will notify the customer and send them an invoice for the work. If the client fails to pay the invoice on time, we will also set up a remainder, such as a 7, 15, or 30-day extension.

Cloud computing is a new trend in this technological age, and customer relationship management (CRM) service providers face new difficulties in order to maintain their standing in the online market. CRM providers help customers online by resolving their problems and being constantly available to match their requirements and business process in order to gain their trust and maintain a positive reputation in cloud computing. CRM also supports business online and maintains the secure and cooperative environment between clients and business owners. [10]

We have developed Cloud based Architecture that automatically manages the business workflows that includes unorganized databases, Activities that are done through the system and coordination with the members around the world. [17]

In essence, this project is an automation-based system designed to help businesses and organizations manage client inquiries in real-time so they may be handled and delegated to the appropriate staff members. For several businesses that will be the most effective in the future, the project is a useful tool. [1]

II. LITERATURE REVIEW

Salesforce.com is a cloud CRM pioneer and the largest CRM provider association in the advertising industry that studies cloud vendors using the SaaS model. The necessary advantages of this service incorporate increasingly unquestionable capacity for various groups, enhanced investigation data and details, and motorization of daily tasks. For use in on-premise association organizations, the application process is not available.[10]

The needs for organizing and controlling cloud-based applications are stated in order to identify the issues that are at the root of the industrial project [18]. In this section, we address the established or founded need to create a dynamic configuration and management. It includes the defining of the configuration domain, a statement of the general arrangement/configuration steps or procedures, a life cycle administration of ownership contracts, and user arrangement/configuration with support for arrangements/reconfiguration. We propose a view-based idea on the Ethernet first mile to limit stakeholder power over arrangement and configuration operations. The objectives of each stakeholder and their associated configurations may vary. As a result, we advise configuration arrangement and dynamics management. [11] We present a method that initiates an automatic action and business procedure compliance certification. To identify both business design and procedures and action compliance rules related to security automatically, concert worker petri nets (Murata 1989) as a self-growing, uniform formalism (Schneider 2000). Petri net design, which models the instructions that are examined concurrently with the step-by-step specs, alerts the user when there are indications that an instruction has been violated in the design, stages, or process structure.

As a result, it facilitates its widespread implementation by automating the certification of procedures and processes in the cloud. Life span that facilitates processes Examine the procedure and the rules, which cover security and privacy. For businesses, cloud computing is a fantastic option thanks to Concert. It rejects the particular process symbols by using a petri net (formalism). For instance, (BPMN), (BPEL), or (EPC). Rules are being tested for compliance with both control flow and data flow.

A cloud-based E-health scenario with the HIPAA rule as a typical example is described in component 2 along with the motivation for the performance. A concert presentation report is offered. Component 3 summarizes the chosen rules, actions, and language while excluding the groups and sections of rules. In component 4, a rules pattern will be obtained from these groupings. That also starts the algorithm for the concert analysis. The paper will come to a close with component 5. [12]

The third related project that we receive from App Exchange is called Invoices for Salesforce, which claims that in bulk mode the app creates an invoice record and a PDF for all of your sales in just one click. The billing process only requires a few clicks, even if you are processing hundreds of invoices at once, and it is completed in a matter of seconds. To your customers and Accounts/Receivables in your pocket, the invoice PDF document can be sent automatically through email. wherever, whenever. [13]

The fourth related project we receive from AppExchange is called TASK MANAGER, and it claims that it can manage and carry out tasks from any place that are entered at various stages, such as contacts, accounts, and so on. This task manager searches for and locates tasks based on ID, NAME, and STATUS. Moreover, the ability to locate and track completed tasks. As a result, security will also be provided for tasks that are completed and deleted. [14]

The final application that relates to ours is Developments Project and Task Management, which claims that if you want to manage your project and task in accordance with the requirements of your company, you have come to the right place. Milestones Project and Task Management is the best and greatest way to manage and customize your task and project. Milestone PM gives you the option to get information about your project's task, schedule, and status. Additionally, it keeps track of projects that take longer than projected to complete. By contrasting actual results with the expected ones, it also monitors changes in the expense budget. [15]

III. METHODOLOGY

This part primarily focuses on gathering all the data necessary for client communication both immediately before and after the item is offered. This is frequently a customized Salesforce Web application that helps the representative successfully capture several information focused while engaging with clients. The two areas of greatest risk are communication and holdup situations [6]. When clients record difficulties in our online application, managers analyze the concerns and assign them to the appropriate employees. Once the issue has been resolved,

we NOTIFY the customer and give them an INVOICE for the job. If the client fails to pay the invoice on time, we will additionally set up a REMAINDER, such as a 7, 15, or 30-day residue. So, our system offers our customers relief so they may settle their debts at their convenience. The chat box feature is one aspect that improves our web programme. This is a third-party integration with smart supp that enables the user/customer to communicate with the management. If the user/customer wishes to make changes to their system, they may do so by speaking with the manager.

The system's key benefit is the ability for customers to select the importance of their tasks. There are three levels of priority—low, medium, and high—and the manager uses one of these levels to determine which staff is most suited to complete each assignment.

IV. SYSTEM FEATURES

Customers may unfortunately encounter problems that cruelly prevent them from utilizing CRM to its full potential, which can prove to be a significant waste of time and money[4]. Customer relationship management (CRM) frameworks are successful for changing businesses to better interface with customers and moving forward the way businesses are run.

With the help of our product, consumers can keep track of the status of their problems and communicate with managers directly about problems with firm products or services they are receiving from other customers.

Here, is demonstrating to you what you can perform with a CRM.

A. A firm can Work from home:
- Cloud-based CRMs have made life easier for everyone.You'll successfully check the last update on the project you've been working so hard on when you get home. Logging in to your CRM is fine; you're ready to go.
- A few years ago, you might have needed to visit your office to access your ERP system.

B. Organized Database for Organization
- Keeping all of your information structured on a single platform is the main and most important method a CRM will help your business.
- Access to data in the cloud is possible through a network of several different pieces of hardware.
- Information can be accessed by remote customers without being limited by geography. As opposed to on-premise, legacy software, cloud-based apps and services are typically easier to distribute and maintain.

Task Planning
- Do you have a long-pending assignment? Plan it essentially from your CRM.By turning on scheduled follow-ups, inform your customers and staff of the situation.
- Case management and upkeep don't require any involvement from you.

C. Client service
- Customers nowadays need to be reacted within a maximum of 2 hours after lodging a complaint. To reply to all demands physically becomes impossible.
- The CRMs, on the other hand, are incredible for client benefit. They let client benefit divisions oversee all the complaints inside the CRM and trigger emails at whatever point there's an update on customer's complaints or service requests [5].
- This decreases the reaction time, and as a result,your business is able to attain high client retention[5].
- Users don't have to download or introduce anything to utilize or update the software [5].

D. Tools
Salesforce makes its claim database available for use, and the platform offers tools and administrations to automate business processes. These tools are integrated with external applications and provide clients with responsive formats

[2]. An online application without a chat feature is outdated compared to email-based communication. A chat box is a fantastic tool for interacting with users inside of a web application. Engage our users in dialogue to convert them into devoted customers.

V. DATABASES

As a database service, Salesforce employs a storage engine. (D Baas) is a cloud-based solution offered by salesforce that is safe, dependable, and quick. According to Al, it wasn't the first to offer cloud-based databases.

Many companies offering services comparable to Amazon SimpleDB, Microsoft Azure, and others provide cloud-based database services. [8].

The Task web application is the database tier, that includes the database task and billing system that is managed by the objects(database). In our work we used Custom objects as a database which provides excellent scalability, high performance and stored the large amount of data and can work in real time [8].

VI. IMPLEMENTATION

Task and Billing automation process is implemented as a goal that provides a vision to a business growth. Task and billing systems provide functionality to big or small organizations to use CRM comfortably. Salesforce CRM has a realistic approach to any problem. The Salesforce CRM sales process are dynamic [7].

A user may quickly submit their requests through our online application, employees can readily grasp the data, and managers will undoubtedly review it. Following reviewing, the management will assign the case to the appropriate employee, who will then be alerted.

Folks have decided to use a customized Salesforce CRM as our implementation strategy. We started with a straightforward, user-friendly pattern. For UI design, we use VisualForce Pages, while the SalesForce.com platform's pages functionality is handled by Apex. as you get expertise using the application and user feedback. To fulfill the demands of the business, create custom fields, page layouts, objects, tabs, rules, and other application customizations depending on the design for each requirement.

VII. CONCLUSION

The work conclusion states that we have learned a lot of things from working on this project, including how to create a chat box employing smart support. It is a tool for external integration.

But you should also learn other languages, like as JavaScript, Bootstrap, and jQuery, since we use Apex to construct our online applications. Our primary goal in building this project was to make it easier for clients. Every business and organization are unique, but all have paying customers that need to receive bills or invoices for services they hired. A developing company would need a straightforward invoice platform like Salesforce.

By offering the most creative and effective ideas/solutions to address current business problems, Salesforce has seen enormous growth in its personnel, clients, and offices throughout the globe.

This project is an automation-based system designed for businesses or organizations to track client inquiries in real-time so they may be handled and assigned to the appropriate staff. The project is a useful tool for several businesses that will be the most effective in the future.

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