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### Research Paper

## Evaluate Laws and Policies For Business Sector Using CRM and CAMS Applications

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### ARTICLE DETAILS

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#### Key words:

Joget, Kanban, CRM, CAMS, Compliance, Audit, Notification, Reporting

### ABSTRACT

This paper combines the development and implementation of three major systems using the Joget DX platform: the Kanban Board App, the Customer Relationship Management (CRM) system with managing sales pipeline stages, notifications, reporting, and a real-time dashboard, and the Compliance Audit Management System (CAMS) with a real-time dashboard and reporting. Each of the systems helps in streamlining organizational operations, ensuring productivity, customer engagement, and maintaining transparency between all the processes with user-friendly interfaces. The CAMS automates compliance submission, audit tracking, document management, and escalated notifications. These systems are designed to improve efficiency, productivity, transparency, and automation in business operations.

### 1.Introduction

With the rapid shift toward digital business operations, organizations are increasingly seeking platforms that can simplify process management and enable workflow automation with minimal coding. Joget DX emerges as a powerful low-code platform that allows for the rapid development and deployment of workflow-based applications tailored to various business needs. This report explores the implementation of three such applications built on the Joget DX platform, each addressing a distinct operational area within an organization. The first application is a Kanban Board App, which provides a visual approach to task management. By organizing tasks into columns and moving them across stages, teams can easily monitor progress and ensure efficient task handling. The second is a Customer Relationship Management (CRM) system integrated with reporting features. This application streamlines customer interactions, manages sales pipelines, and includes automated notifications and reports, helping businesses maintain strong client relationships and stay informed. The third application is a Compliance and Audit Management System (CAMS), which automates regulatory compliance and internal audit processes. Through predefined workflows and escalation mechanisms, CAMS ensures that organizations can effectively monitor and adhere to regulatory standards. In today's digital business environment, organizations often struggle with several operational challenges. One major issue is the lack of visual task management, making it difficult for teams to track and manage project progress effectively. Customer relationship management is another area where many businesses face inefficiencies, as handling communications and follow-ups manually can be time-consuming and prone to errors. Compliance management adds further complexity, with manual audit tracking and document handling increasing the risk of non-compliance, potential penalties, and overall inefficiency. Without integrated systems, different teams tend to work in silos, which leads to data duplication, communication breakdowns, and missed deadlines—ultimately affecting productivity and decision-making.

### 2. Methodology

The systems were developed using the Joget DX platform, highlighting its low-code capabilities. The development process included gathering requirements from business users, designing forms, processes, lists, and user views using a drag-and-drop interface, and implementing role-based access control. Key features such as automated notifications, escalations, reporting, and real-time data dashboards were integrated. The technologies used in the project include Joget DX (low-code

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platform), Java (BeanShell scripting), MySQL (database), and HTML, CSS, and JavaScript for dashboard and reporting components.



Fig 1: Compliance Workflow

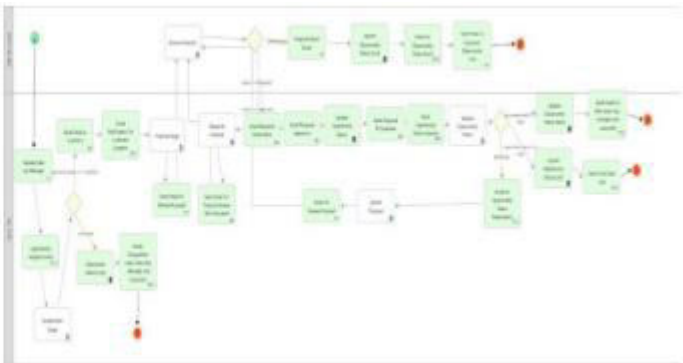


Fig-2 : Sales Opportunity Workflow



Fig-3: Audit Workflow

3.Results

- 1. Kanban Board App: Real time updates of task using drag and drop functionality. Enhanced task clarity and user collaboration through visual workflow stages.
- 2. CRM System: Improved customer engagement with automatic follow-up reminders , maintain sales pipeline stages, maintain communication logs, real time analytics dashboard and report.
- 3. CAMS: Ensured timely regulatory compliance by scheduling compliance , scheduling audits, maintaining findings, documentation and sending overdue reminders and sending escalation alerts. Real time dashboards also helps in decision-making.

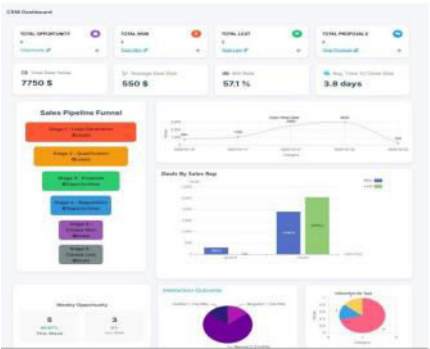


Fig-4: CRM Dashboard

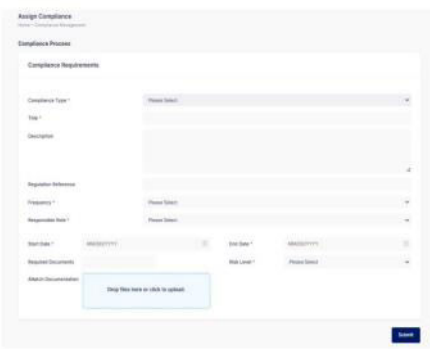


Fig-5 Assign Compliance

Problem Solving Approach and Problem Types Addressed

| System       | Problem Solved                                                                    | Type of Problem       |
|--------------|-----------------------------------------------------------------------------------|-----------------------|
| Kanban Board | Lack of task visibility and real-time collaboration                               | Operational           |
| CRM System   | Inefficient customer follow up and maintaining sales pipeline stages is difficult | Customer Engagement   |
| CAMS         | Manual compliance tracking and missed audit deadlines                             | Business Intelligence |
|              |                                                                                   | Regulatory/Legal      |

4.Conclusions

This integrated project demonstrates how joget can address real world problems across multiple domains through modular and automated solutions. The kanban system enhances the productivity by providing the ability to managing the task visually The CRM system boosts customer engagement, The CAMS system mitigates the risk of compliance and audit Together these systems empower organizations to streamline operations , reduce human errors , and meet regulatory obligations efficiently.

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