

Project Report Template

1 INTRODUCTION

1.1 Overview

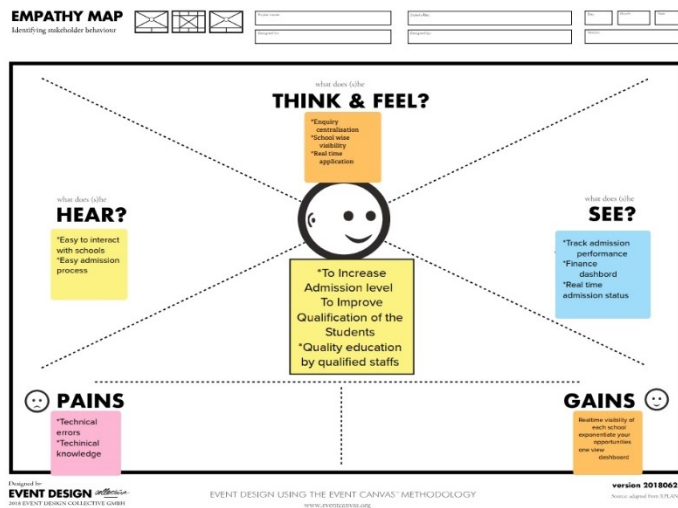
A CRM is a customer centric system that can help education professionals nurture relationships with prospects and enrollees , produce data drive insights to illustrate progress towards goals and streamline their admissions and marketing initiatives to save time and effort.

1.2 purpose

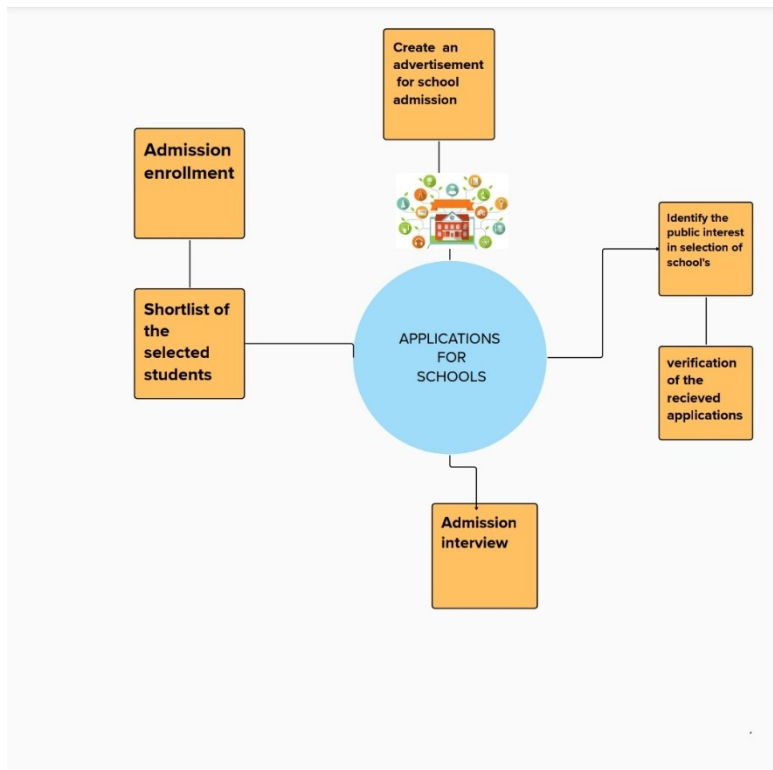
A CRM is a system that helps schools manage the entire lifecycle of a potential customer sometimes also referred to as a lead .With a CRM ,you can track and store the data that's important to your operation , all in one easy-to-access place.

2 PROBLEM DEFINITON AND DESIGN THINKING

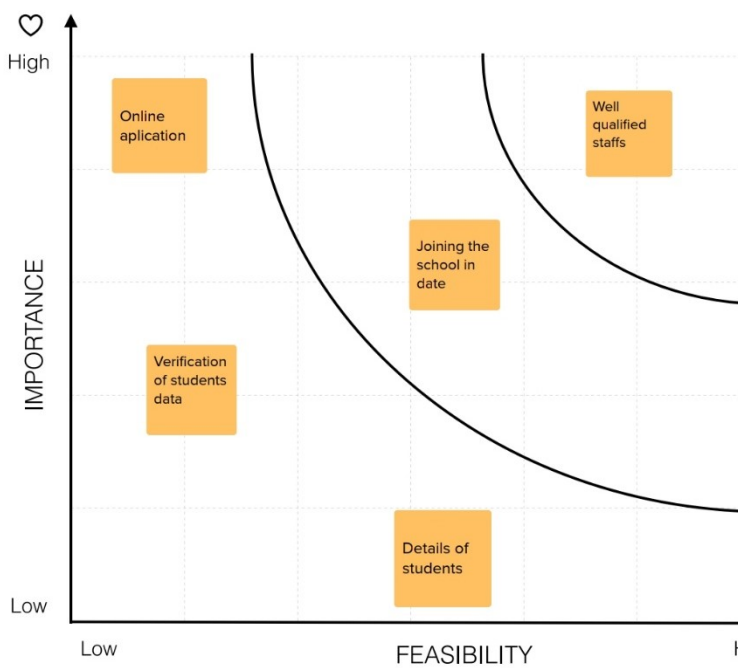
2.1 EMPATHY MAP



2.2 Ideation and brainstorming Map



Idea Prioritization



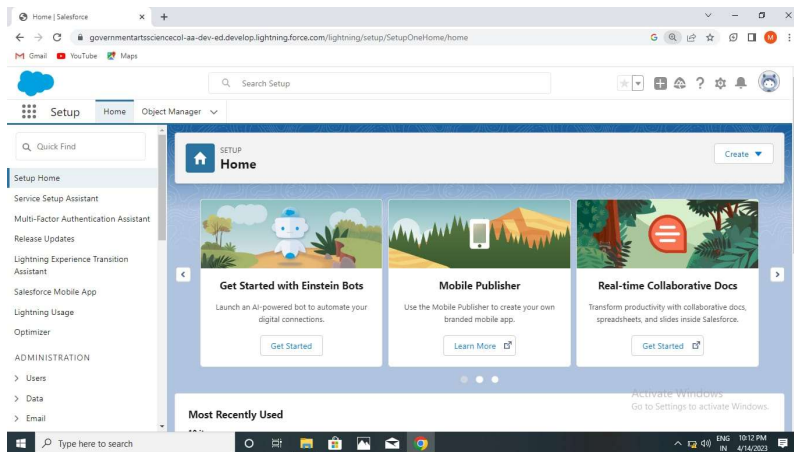
3 RESULT

3.1 DATA MODEL

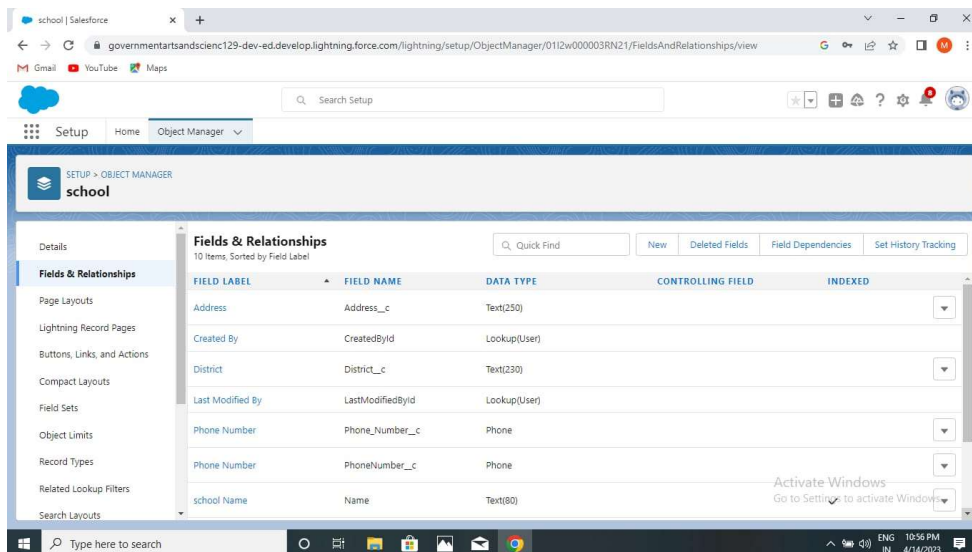
OBJECT NAME	FIELDS IN THE OBJECT		
OBJ 1 SCHOOL	FIELD LABEL	DATA TYPE	
	Address	Text area	
OBJ 2 STUDENTS	FIELD LABEL	DATA TYPE	
	Phone number	Phone	
OBJ 3 PARENT	FIELD LABEL	DATA TYPE	
	Parent address	Text area	

3.2 ACTIVITY AND SCREENSHOT

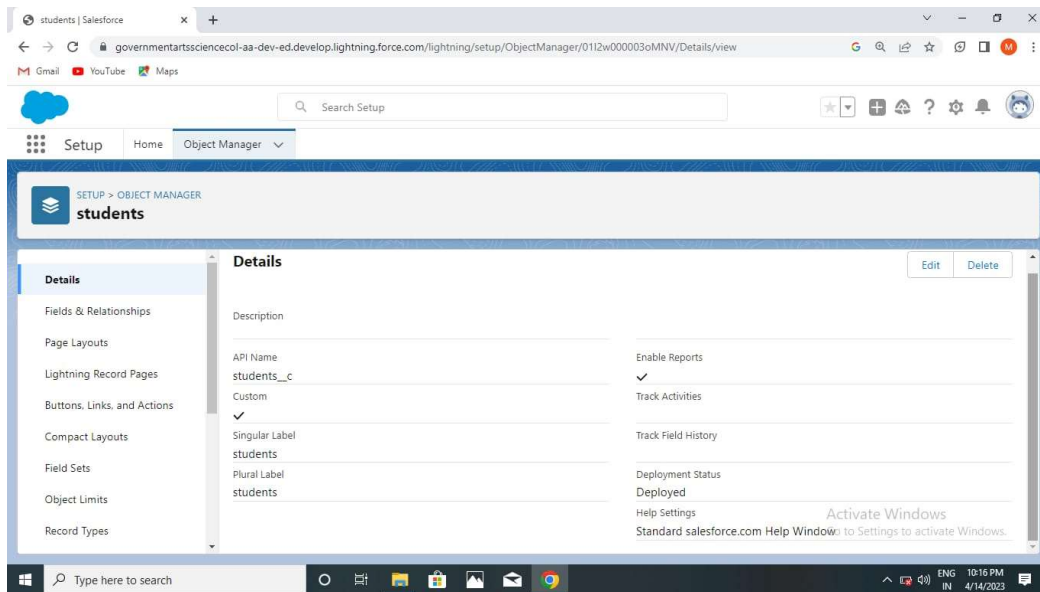
CREATING DEVELOPER ACCOUNT



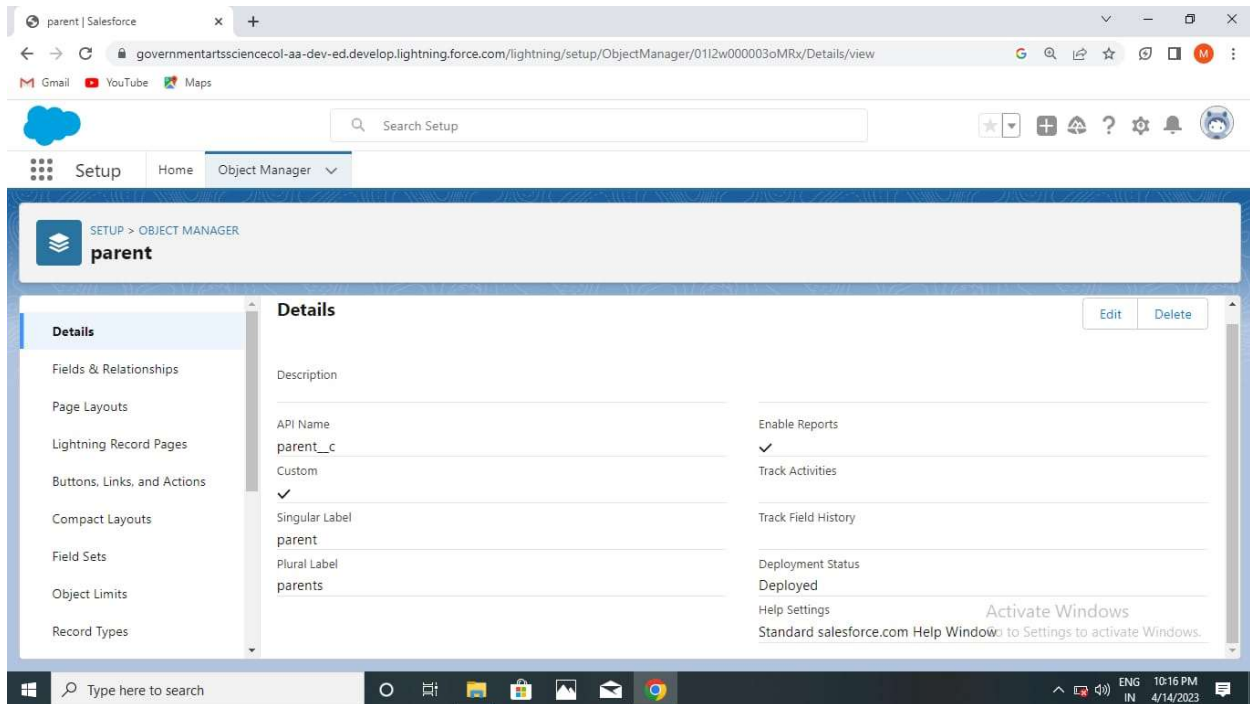
CREATION OF SCHOOL OBJECT



CREATION OF STUDENT OBJECT



CREATION OF PARENT OBJECT



CREATION OF FIELDS FOR THE SCHOL OBJECTS

school | Salesforce

governmentartssandscienc129-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RN21/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
school

Details

Fields & Relationships
10 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(250)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text(250)		
Last Modified By	LastModifiedById	Lookup(User)		
Phone Number	Phone_Number__c	Phone		
Phone Number	PhoneNumber__c	Phone		
school Name	Name	Text(80)		

Activate Windows
Go to Settings to activate Windows.

CREATION OF FIELDS FOR STUDENT OBJECT

students | Salesforce

governmentartssciencecol-aa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oMNV/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
students

Details

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Student	Student__c	Text Area(255)		
students Name	Name	Text(80)		✓

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CREATION OF FIELDS FOR PARENT OBJECT

parent | Salesforce

governmentartssciencecol-aa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oMRx/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

parent

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent	Parent__c	Text Area(255)		
parent Name	Name	Text(80)		✓

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CREATION ON PROFILE

Profiles | Salesforce

governmentartssciencecol-aa-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profile

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>

1-25 of 41 0 Selected

Previous Next

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Page 1 of 2

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CREATING A USERS

Users | Salesforce

governmentartssciencecol-aa-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

SETUP Users

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000rn4c5eaj.hevopru2zvht@chatter.salesforce.com		✓	Chatter Free User
Edit	parents	pare	meenaroshinis2003@gmail.com		✓	Standard User
Edit	principals	prin	shilooashilooas06@gmail.com		✓	Standard Platform User
Edit	Roshini Meena	MRosh	meenaroshini@gaschsr.com		✓	System Administrator
Edit	Teachers	Teachers	meenaroshini069@gmail.com		✓	Standard Platform User
Edit	User Integration	inteo	integration@00d2w00000rn4c5eaj.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000rn4c5eaj.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

Activate Windows
Go to Settings to activate Windows.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Type here to search

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PERMISSION SETS

Users | Salesforce

governmentartssciencecol-aa-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

SETUP Users

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000rn4c5eaj.hevopru2zvht@chatter.salesforce.com		✓	Chatter Free User
Edit	parents	pare	meenaroshinis2003@gmail.com		✓	Standard User
Edit	principals	prin	shilooashilooas06@gmail.com		✓	Standard Platform User
Edit	Roshini Meena	MRosh	meenaroshini@gaschsr.com		✓	System Administrator
Edit	Teachers	Teachers	meenaroshini069@gmail.com		✓	Standard Platform User
Edit	User Integration	inteo	integration@00d2w00000rn4c5eaj.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000rn4c5eaj.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

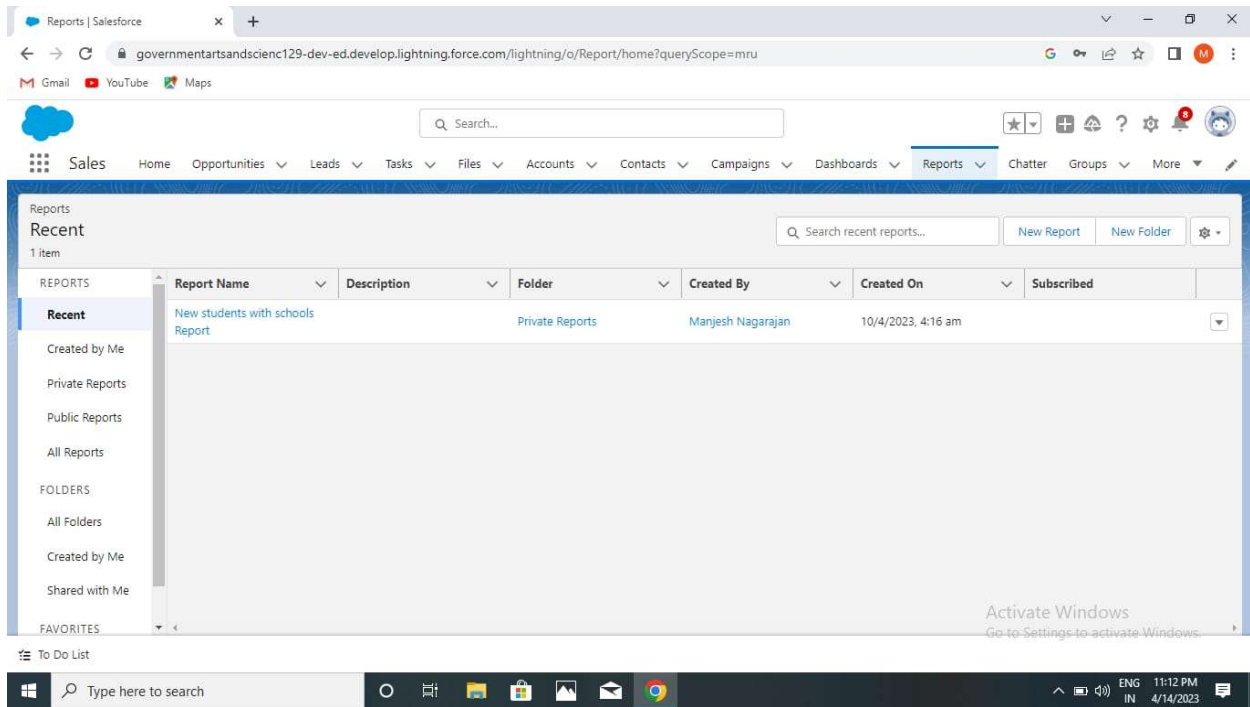
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Type here to search

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REPORT:



4 TRAIL PROFILE PUBLIC URL

TEAM LEAD - <https://trailblazer.me/id/m2106>

TEAM MEMBER 1-<https://trailblazer.me/id/ssrinivas333>

TEAM MEMBER 2- <https://trailblazer.me/id/na144>

TEAM MEMBER 3- <https://trailblazer.me/id/sroshini5>

5 ADVANTAGES AND DISADVANTAGES

AVANTAGES;

- 1 Beneficial for the different departments or teams of the business
- 2 customer are engaged across multiple channel
- 3 provide sreamline operations
- 4 improve customer service
- 5 data miming

DISADVANTAGES

- 1 A costly project
- 2 loss of collected information or record
- 3 not suitable for every business
- 4 it eliminates the human elements
- 5 centralized data is at stake

APPLICATIONS

- 1 SCHOOL and COLLEGE management are administration

CONCLUSION

CRM application is a business based on trust and value.

FUTURE SCOPE

- 1 Module for employee recruitment
- 2 Web module for web interface