

# Project Report Template

## CRM-APPLICATION FOR SCHOOL/COLLEGES

### 1 INTRODUCTION

#### 1.1 Overview

Customer relationship management (CRM) is the combination of practices, strategies

And technologies that companies use to manage and analyze customer interactions and data

Data throughout the customer lifecycle. The goal is to improve customer service relationships

And assist in customer retention and drive sales growth.

#### 1.2 PURPOSE

Customer relationship management (CRM) is a technology for managing all your

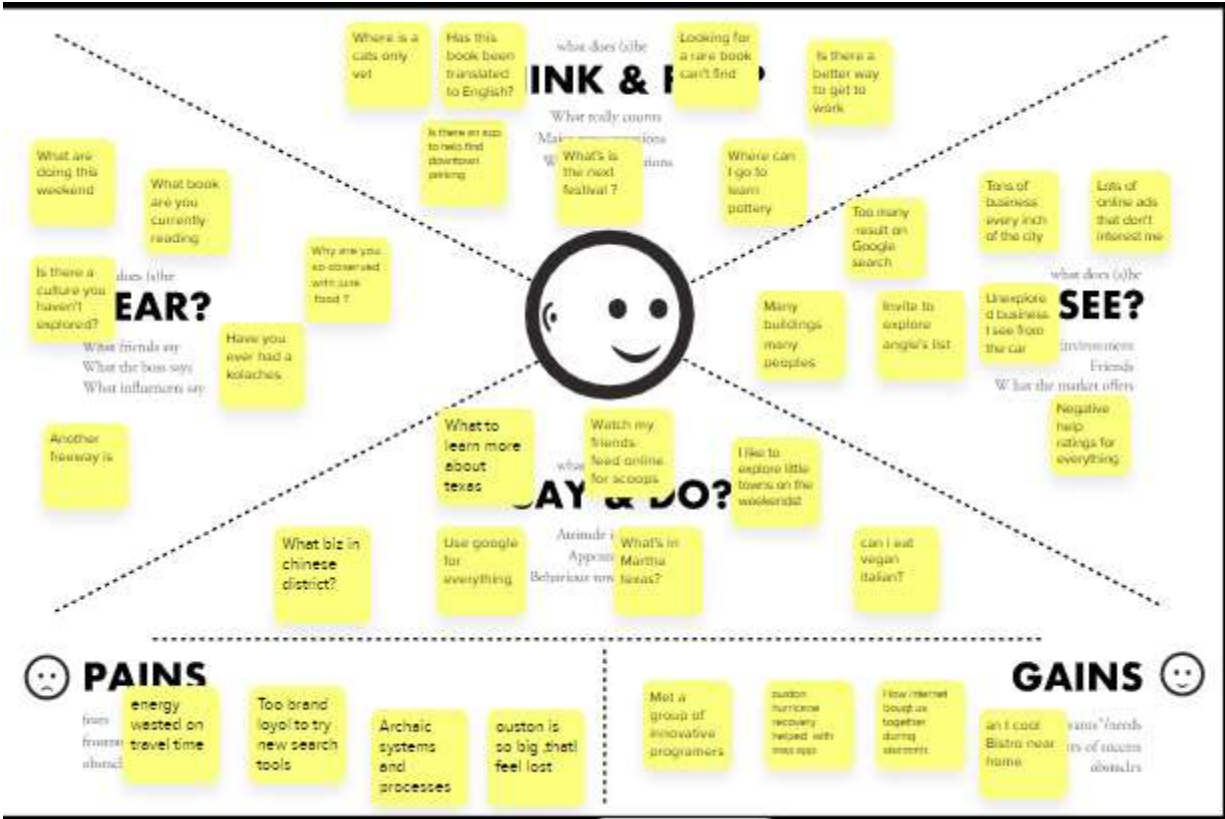
Company's relationships and interactions with customers and potential customers.

The goal is simple improve business relationships. A CRM system helps companies stay

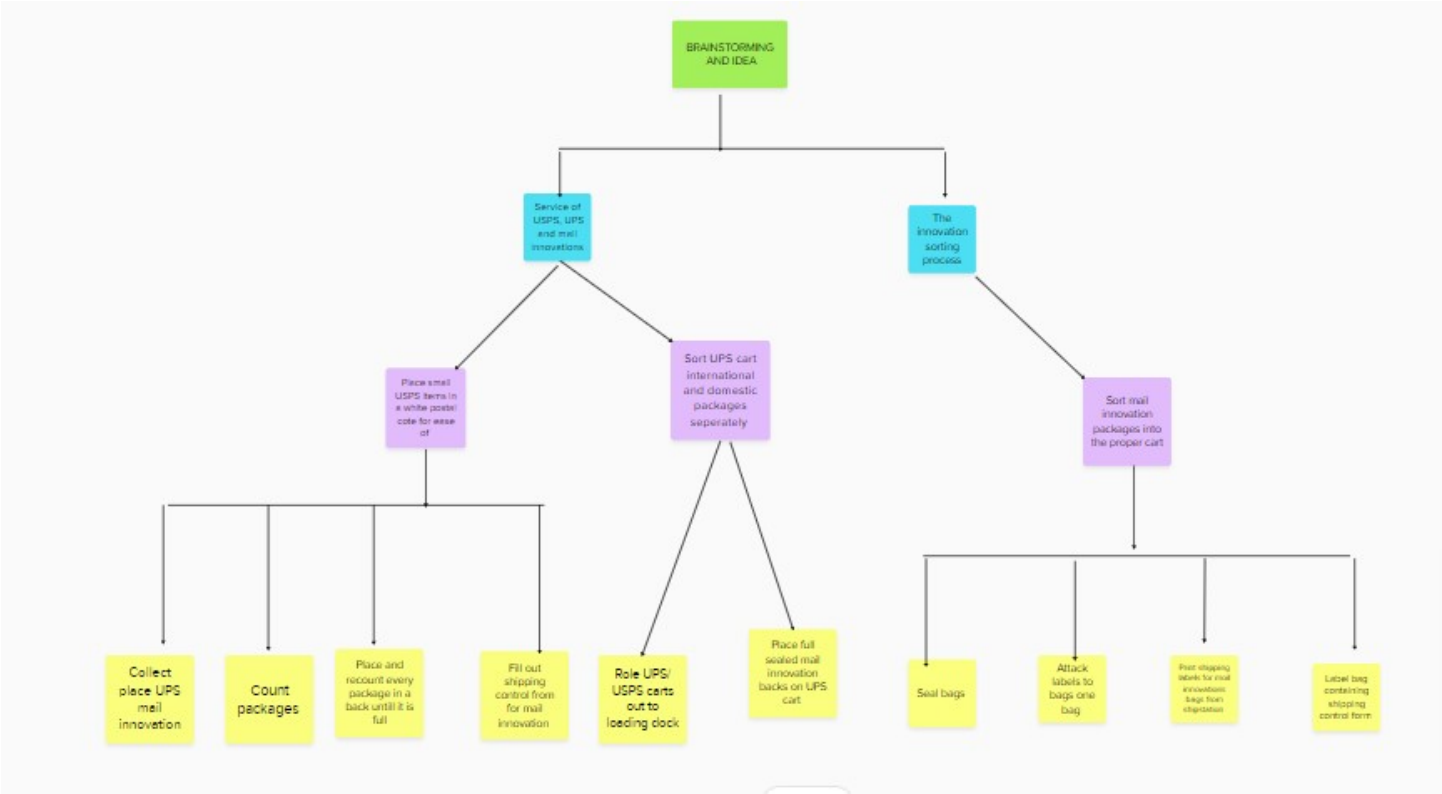
Connected to customers, streamline, processes, and improve profitability.

### 2 Problem Definition & Design Thinking

#### 2.1 Empathy Map



2.2. Ideation & Brainstorming Map



3RESULT

3.1 Data Model

Object name	Fields in the Object	
School	Field Label	Data Type
	Address	Text Area
	District	Text Area
	State	Text Area
	school	Text Area
	Phone Number	Phone

	Number of Students	Roll-up summery
	Highest Marks	Roll-up summery

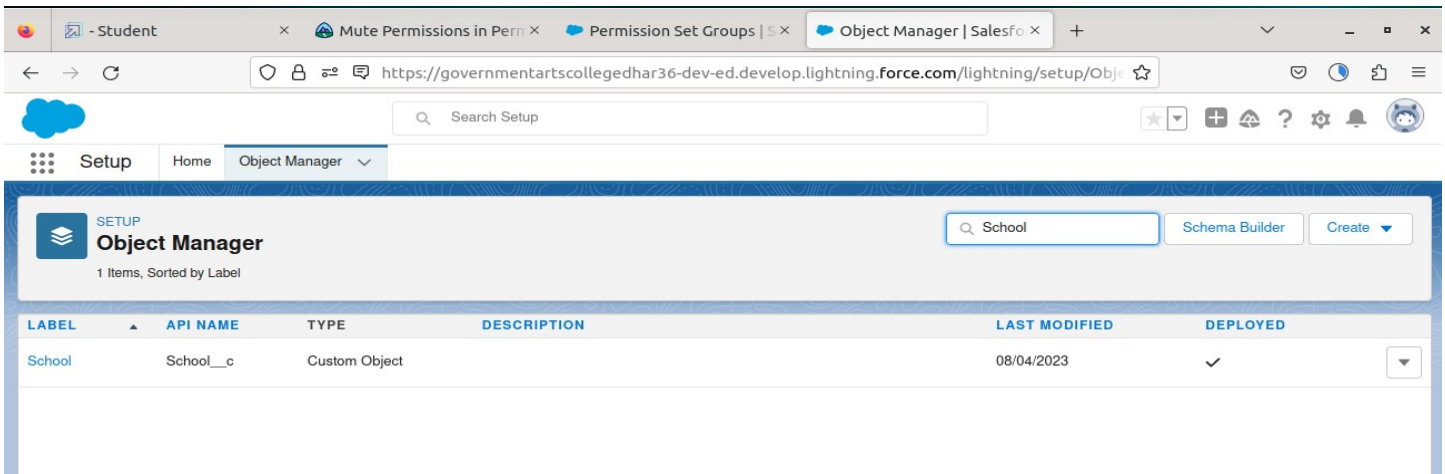
Object name	Fields in the Object	
Student		
	Field Label	Data Type
	Phone number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number
Parent		
	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

## 3.2 Activity & Screenshot

(Milestone-2:OBJECT)

### Activity-1 : Creation of School Object

#### # Creation of Object for School Management



The screenshot displays the Salesforce Object Manager interface in a web browser. The browser's address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Objec>. The page header includes a search bar with the text "Search Setup" and a navigation menu with "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" and shows "1 Items, Sorted by Label". A search bar with the text "School" is present. Below this, a table lists the objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the "School" object, which is a Custom Object, last modified on 08/04/2023, and is deployed (indicated by a checkmark).

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	School__c	Custom Object		08/04/2023	✓

( Milestone-2:OBJECT )

### Activity-2 : Create Student Object

## # Creation of Student Object

The screenshot shows the Salesforce Object Manager interface. The browser tabs include '- Student', 'Mute Permissions in Perm...', 'Permission Set Groups |', and 'Object Manager | Salesfo...'. The address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj>. The page header has a search bar with 'Search Setup' and a 'Search' button. The main header shows 'Setup' and 'Object Manager' tabs. The 'Object Manager' section has a search bar with 'Student', a 'Schema Builder' button, and a 'Create' button. Below this, a table lists the objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Students	Students__c	Custom Object		08/04/2023	✓

### ( Milestone-2: OBJECT )

#### Activity-2 : Create Parent Object

## # Creation of Parent Object

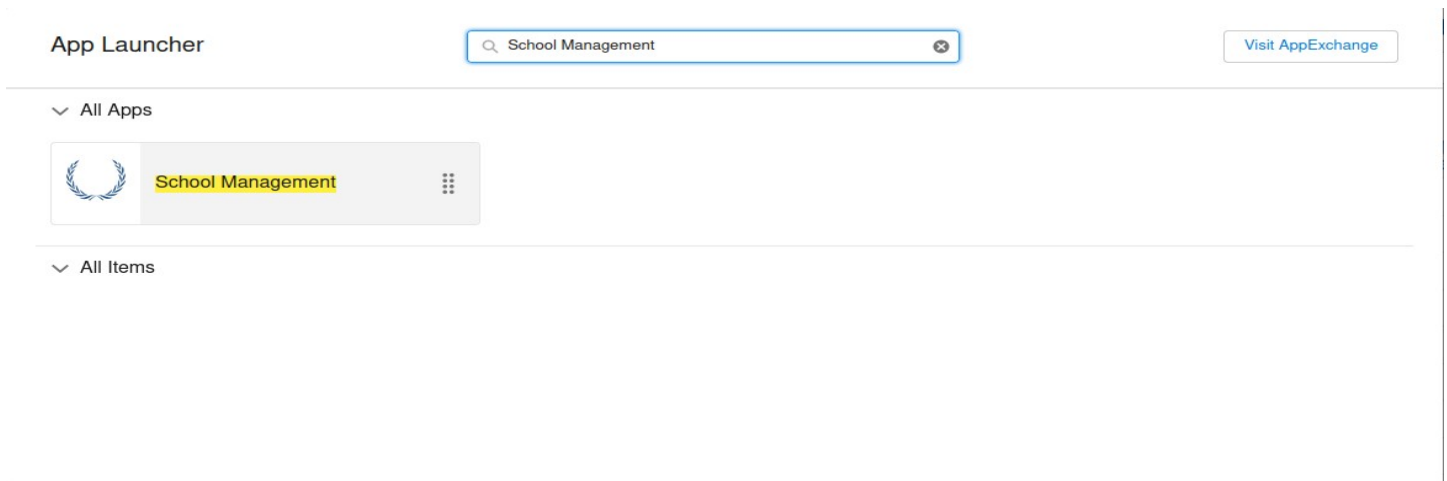
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LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		08/04/2023	✓

### ( Milestone-3: LIGHTNING APP )

#### Activity-1 : Create the School Management App

# # Creation School Management App



## ( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-1 : Creation of fields for the School Objects

#### # Creation of fields for the School Object

Screenshot of the Salesforce Setup interface showing the 'Fields & Relationships' section for the 'School' object.

The browser address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj>

The Setup navigation menu on the left includes: Setup, Home, Object Manager, and a search bar.

The main content area is titled 'SETUP > OBJECT MANAGER School'. It displays a table of fields and relationships for the 'School' object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedBy	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Students)		
Last Modified By	LastModifiedBy	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT Students)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		

Record Types	School Name	Name	Text(80)	▼
Related Lookup Filters	School Websites	School_Websites__c	Text Area(255)	▼
Search Layouts	State	State__c	Text Area(255)	▼
List View Button Layout				

## ( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-2 : Creation of fields for the Student Objects

#### # Creation of fields for the Student Object

Students | Salesforce

https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj...

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Students

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		▼
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		▼
Phone Number	Phone_Number__c	Phone		▼
Results	Results__c	Picklist		▼
School	School__c	Master-Detail(School)		✓▼
Students Name	Name	Text(80)		✓▼

## ( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-3 : Creation of fields for the Parent Objects

## # Creation of fields for the Parents Object

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. A table lists the fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Last Modified By, Owner, Parent Address, Parent Name, and Parent Number. The URL at the bottom of the browser window is: https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XmBm/FieldsAndRelationships/CreatedBy/view

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 Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Number(18, 0)		

( Milestone-5: PROFILE )

Activity-1 : Creation on Profile

# Creation on Profiles



Screenshot of the Salesforce Setup interface showing the Profiles page.

The browser address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Enhance>.

The left sidebar shows the Setup menu with the following items: Setup, Home, Object Manager, and Profiles (selected).

The main content area displays the Profiles page. The page title is "Profiles". Below the title, there is a "New Profile" button and a "Help for this Page" link.

The table below lists the profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	<a href="#">Salesforce API Only System Integrations</a>	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	<a href="#">School Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	<a href="#">Silver Partner User</a>	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>

At the bottom of the table, there is a pagination bar showing "1-7 of 7" and "0 Selected". The page number is "Page 1 of 1".

## ( Milestone-6: USERS )

### Activity-1 : Creating a Users

#### # Creating a Users

Screenshot of the Salesforce Setup page for Users. The page title is "Users". The left sidebar shows the navigation menu with "Users" selected. The main content area displays "All Users" and provides instructions on how to create, view, and manage users. It also mentions downloading the SalesforceA mobile app for administrative tasks. Below the instructions, there is a table listing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains 7 rows of user data.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	C. SIVARANJANI	sc	sivaranjani12161@gmail.com		✓	School Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000rk2gqeal.khyf2wwdkywyv@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	g. narmatha	ng	narmathachysics2003@gmail.com		✓	Standard Platform User
<a href="#">Edit</a>	n. pradeep kumar	pn	pk210702@gmail.com		✓	Standard Platform User
<a href="#">Edit</a>	S. RAMARAJ	RS	ramaraj0712@gmail.com		✓	System Administrator
<a href="#">Edit</a>	User Integration	integ	integration@00d2w00000rk2gqeal.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rk2gqeal.com		✓	Analytics Cloud Security User

## ( Milestone-7: PERMISSION SETS )

### Activity-1 : Permission sets 1:

#### # To Set Permissions

Screenshot of the Salesforce Setup page for Permission Sets. The page title is "Permission Sets". The left sidebar shows the navigation menu with "Permission Sets" selected. The main content area displays "Permission Sets" and provides instructions on how to create, view, and manage permission sets. It also mentions using the SalesforceA mobile app to assign permission sets to a user. Below the instructions, there is a table listing permission sets with columns for Action, Permission Set Label, Description, and License. The table contains 1 row of permission set data.

Action	Permission Set Label	Description	License
<a href="#">Del</a>   <a href="#">Clone</a>	teacher_permission		

## ( Milestone-7: PERMISSION SETS )

### Activity-2 : Permission sets 2:

## # To Set Permissions

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar and a navigation menu with categories: Users, Feature Settings, and Data.com. Under the 'Users' category, the following items are listed: Permission Set Groups, Permission Sets (highlighted), Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Permission Sets' and includes a 'Help for this Page' link. Below the title, there is a description of the page and a link to download the Salesforce mobile app. A filter dropdown is set to 'All Permission Sets'. Below this, there is a table with columns: Action, Permission Set Label, Description, and License. The table contains one row with a 'Del' button and the label 'Principal permission'.

## ( Milestone-8: REPORTS )

### Activity-1 : Reports

## # Reports

The screenshot shows the Salesforce Reports page. The left sidebar contains a search bar and a navigation menu with categories: Sales, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (highlighted), Chatter, and More. The main content area is titled 'Reports' and includes a 'Search recent reports...' bar. Below this, there is a table with columns: REPORTS, R..., Description, Folder, Created By, C, and Subscribed. The table contains four rows of reports. The first row is 'Recent' and the second row is 'Created by Me'. The third row is 'Private Reports' and the fourth row is 'Public Reports'. The table also includes a 'New Report' button and a 'New Folder' button.

REPORTS	R...	Description	Folder	Created By	C	Subscribed
Recent						
Created by Me	SUDEN TS	Private Reports	RAMARAJ S	9/4/2023, 9:25 pm	✓	
Private Reports	New Schools Report	RAM	RAMARAJ S	8/4/2023, 5:53 pm	✓	
Public Reports	PAREN TS	Private Reports	RAMARAJ S	9/4/2023, 9:23 pm	✓	
All Reports	New Accounts Report	Private Reports	RAMARAJ S	17/3/2023, 9:40 pm	✓	
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Transferring data from governmentartscollegedhar36-dev-ed.develop.lightning.force.com...

## **4 Trailhead Profile Public URL**

**Team Lead -** <https://trailblazer.me/id/tamik33>

**Team Member 1-** <https://trailblazer.me/id/santtd20>

**Team Member 2-** <https://trailblazer.me/id/sentamil12>

**Team Member 3 -** <https://trailblazer.me/id/shalini-123>

## **5 ADVANTAGES & DISADVANTAGE**

### **Advantages**

#### **Facilitates discovery of new customers**

CRM systems are useful in identifying potential customers. They keep track of the profiles of the existing clientele and can use them to determine the people to target for maximum clientage returns.

New customers are an indication of future growth. However, a growing business utilizing CRM software should encounter a higher number of existing customers versus new prospects each week. Growth is only essential if the existing customers are maintained appropriately even with recruitment of new prospects.

#### **Increases customer revenues**

CRM data ensures effective co-ordination of marketing campaigns. It is possible to filter the data and ensure the promotions do not target those who have already purchased particular products. Businesses can also use the data to introduce loyalty programs that facilitate a higher customer retention ratio. No business enjoys selling a similar product to a customer who has just bought it recently. A CRM system coordinates customer data and ensures such conflicts do not arise.

#### **Helps the sales team in closing deals faster**

A CRM system helps in closing faster deals by facilitating quicker and more efficient responses to customer leads and information. Customers get more convinced to turn their inquiries into purchases once they are responded to promptly. Organizations that have successfully implemented a CRM system have observed a drastic decrease in turnaround time.

#### **Enhances effective cross and up selling of products**

Cross – selling involves offering complimentary products to customers based on their previous purchases. On the other hand, up – selling involves offering premium products to customers in the same category. With a CRM system, both cross and up – selling can be made possible within a few minutes of cross – checking available data.

Apart from facilitating quicker offers to customers, the two forms of selling helps staff in gaining a better understanding of their customer's needs. With time, they can always anticipate related purchases from their customer.

#### **Simplifies the sales and marketing processes**

A CRM system facilitates development of better and effective communication channels. Technological integrations like websites and interactive voice response systems can make work easier for the sales representatives as well as the organization. Consequently, businesses with a CRM have a chance to provide their customers with various ways of communication. Such strategies ensure appropriate delivery of communication and quick response to inquiries and feedback from customers.

### **Makes call centers more efficient**

Targeting clients with CRM software is much easier since employees have access to order histories and customer details. The software helps the organization's workforce to know how to deal with each customer depending upon their recorded archives. Information from the software can be instantly accessed from any point within the organization.

CRM also increases the time the sales personnel spend with their existing customers each day. This benefit can be measured by determining the number of service calls made each day by the sales personnel. Alternatively, it could also be measured through the face – to – face contact made by the sales personnel with their existing customers.

### **Enhances customer loyalty**

CRM software is useful in measuring customer loyalty in a less costly manner. In most cases, loyal customers become professional recommendations of the business and the services offered. Consequently, the business can promote their services to new prospects based on testimonials from loyal customers. Testimonials are often convincing more than presenting theoretical frameworks to your future prospects. With CRM, it could be difficult pulling out your loyal customers and making them feel appreciated for their esteemed support.

## **Disadvantages**

### **1. A costly project**

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data mitigation, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

### **2. Loss of collected information or records**

CRM (customer relationship management) tools can be responsible for losing the customer's information as some CRM software keeps track of customers' information using remote internet connections. Due to this, sometimes organization needs to have control over the customer's information (detailed), especially when a system failure event happens. An unstable CRM can result in the loss of money in revenue for the company in the future.

### **3. Not suitable for every business**

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't connect to the customers directly therefore, they don't need a CRM tool. Forming CRM to make it function properly company or business has to spend a lot of money, including various phases.

### **4. It eliminates the human element.**

CRM is a fully automated tool that has prevented human intervention. It automatically collects all the data and processes it. CRM efficiently manages the relationship between the company and customers as it directly interacts between people and its staff. Customers can shift anywhere due to the loss of human touch, reducing sales and revenue.

### **5. Can be accessed by the third party**

As we know, CRM collects customers' sensitive information and stores it, which other parties can misuse. For example, web hosting companies take and sell collected data to a third party that misuses the data and causes loss to people.

### **6. CRM is not fully customized**

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

## **6 APPLICATIONS**

### **Applications of a CRM – Examples and Strategies**

- \* Application 1: Tracking Customers
- \* Application 2: Collecting Data for Marketing
- \* Application 3: Improving Interactions and Communications
- \* Application 4: Streamlining Internal Sales Processes
- \* Application 5: Planning Your Operations.

## **7 CONCLUSION**

Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BMW has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sale of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has greatly diversified its customer roots to various market bases. Mercedes has majored in a customer-dealership business relationship. This has provided the company

with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in the automotive

## 8 FUTURE SCOPE

The future has arrived — at least it has in the world of customer relationship management or CRM software, one of the fastest growing categories of enterprise software. We are entering the era of intelligent, integrated CRM, and the future of CRM is even brighter. From small businesses to global enterprises, sales and marketing teams are adopting CRM to deliver better customer experiences, acquire and retain customers, and gain new customer-centric insights that are changing their companies for the better.

