

1. INTRODUCTION

1.1 Overview

Today, a good customer relationship management (CRM) platform is the backbone of many successful student recruitment efforts. A CRM is a customer – centric system that can help education professionals nurture relationships with prospects and enrollees, produce data-driven insights to illustrate progress towards goals, and streamline their admissions and marketing initiatives to save time and effort.

In the right hands, this is a tool with immense value. For those who are new to the concept of CRM, though, or are in the process of adopting and exploring CRM platforms, it may not be readily apparent exactly how to harness the power of this type of system.

1.2 Purpose

USER FRIENDLY

The CRM and the mobile app are very easy and simple to use for any kind of user even without any kind of computer knowledge. All flexible customizations are available in the system.

CENTRALIZED LEADS

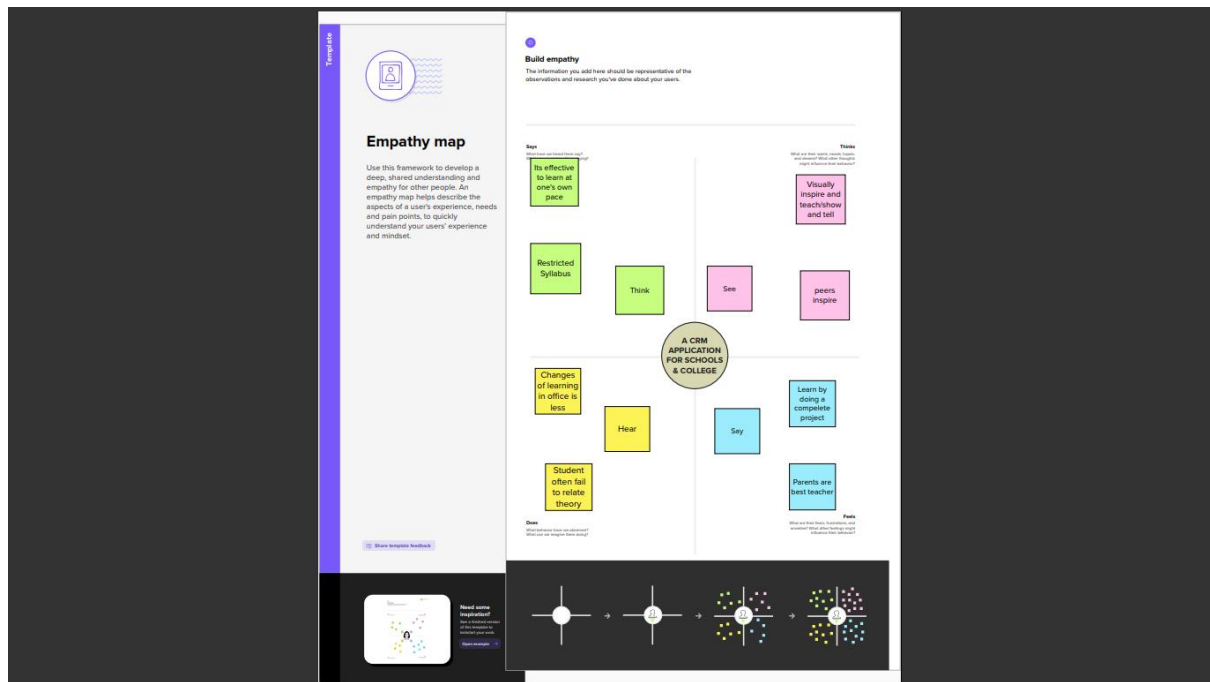
All the leads / inquiries from various sources like Facebook, Google ads, Justdial Sulekha, API, Websites and landing pages will be added to the CRM directly including bulk uploads.

ADVANCED AUTOMATION

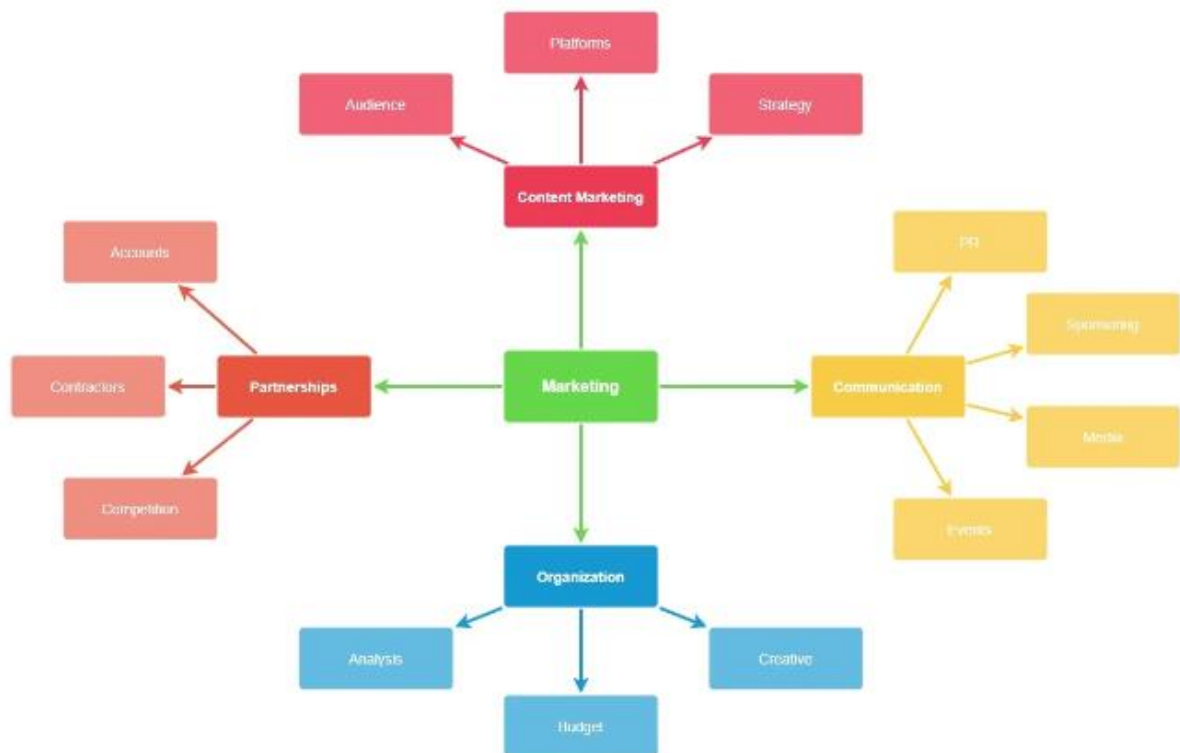
Manage all kind of automation including auto allocate of leads to sales team, manage them and to be in touch with your leads, prospects or customers in a simplified manner.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION AND BRAINSTROMING MAP



3. RESULT

3.1 DATA MODEL :

Object name	Fields in the object	
Obj1		
	Field label	Data type
	Address	Text Area
	District	Text Area

Obj2

Field lable	Data type
Phone number	Phone
Class	Number

3.2 ACTIVITY AND SCREENSHORT



✓ Users

Permission Set Groups

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Permission Sets

[./one/one.app#/setup/PermSets/h](#)

✓ Custom Code

Custom Permissions

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Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

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SETUP

Permission Sets

Permission Set
Principal Permission

[Video Tutorial](#) | [Help for this Page](#)

Find Settings...

CloneEdit PropertiesManage Assignments

Permission Set Overview

Description	API Name	Principal_Permission
License	Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By Sheeladevi Anbuselvam , 11/04/2022 pm
Last Modified By	Sheeladevi Anbuselvam , 11/04/2023, 2:22 pm	

Apps

Assigned Apps

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Assigned Connected Apps

Settings that specify which connected



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Permission Sets

Permission Set

Teacher permission

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Edit Properties

Manage Assignments

Permission Set Overview

Description	API Name	Teacher_permission
License	Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By Sheeladevi Anbuselvam , 11/04/2023, 2:20 pm
Last Modified By	Sheeladevi Anbuselvam , 11/04/2023, 2:20 pm	

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Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are

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▼ Users

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Public Groups
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Users

User

Sheeladevi Anbuselvam

[User Profile Help for this Page](#)

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User Detail

[Edit](#) [Sharing](#)
[Change Password](#)

Name	Sheeladevi Anbuselvam	Role	
Alias	SAnbu	User License	Salesforce
Email	sheeladevia2@gmail.com	Profile	System Administrator
Username	sheela@developer.com	Active	<input checked="" type="checkbox"/>
Nickname	sheela	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	Arignar anna government arts college Musiri	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	Sftr.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Sftr.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>

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	Case	Case Layout [View Assignment]	Scorecard [View Assignment]
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Profiles

Profile

parent profile

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Profile Detail

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Name	parent profile		
User License	Analytics Cloud Integration User	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Sheeladevi Anbuselvam, 11/04/2023, 2:11 pm	Modified By	Sheeladevi Anbuselvam

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway	Payment Gateway Layout [View Assignment]
Asset State Period	Asset State Period Layout [View Assignment]	Payment Gateway Log	Payment Gateway Log Layout [View Assignment]

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Sales Processes (/one/one.app#/setup/Oppo	Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment	Payment Auth [View Assignn
	Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway	Payment Gate [View Assignn
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▼ Service ▼ Entitlement Management Entitlement Processes (/one/one.app#/setup/Sla Support Processes (/one/one.app#/setup/CaseF	Authorization Form	Authorization Form Layout [View Assignment]	Payment Line Invoice	Payment Line [View Assignn
	Authorization Form Consent	Authorization Form Consent Layout [View Assignment]	Price Book	Price Book La [View Assignn
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	Campaign Member	Campaign Member Page Layout [View Assignment]	Quick Text	Quick Text La [View Assignn
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	Cart	Cart Layout [View Assignment]	Refund Line Payment	Refund Line F [View Assignn
	Cart Adjustment Basis	Cart Adjustment Basis Layout [View Assignment]	Report Anomaly Event Store	Report Anoma [View Assignn
	Cart Adjustment Group	Cart Adjustment Group Layout [View Assignment]	Resource Absence	Resource Abs [View Assignn
	Cart Checkout Session	Cart Checkout Session Layout [View Assignment]	Resource Preference	Resource Pre [View Assignn
	Cart Delivery Group	Cart Delivery Group Layout [View Assignment]	Return Order	Return Order [View Assignn
	Cart Item	Cart Item Layout [View Assignment]	Return Order Item Adjustment	Return Order [View Assignn
	Cart Tax	Cart Tax Layout [View Assignment]	Return Order Item Tax	Return Order [View Assignn
	Cart Validation Output	Cart Validation Output Layout [View Assignment]	Return Order Line Item	Return Order [View Assignn
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	Case Milestone	Case Milestone Layout [View Assignment]	Scorecard Metric	Scorecard Me [View Assignn

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School Profile

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[Enabled Custom Metadata Type Access \[m\]](#) | [Enabled Custom Setting Definitions Access \[m\]](#) | [Enabled](#)
[Enabled Service Presence Status Access \[m\]](#) | [Enabled Custom Permissions \[m\]](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	School Profile		
User License	Analytics Cloud Integration User	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Sheeladevi Anbuselvam, 11/04/2023, 2:09 pm	Modified By	Sheeladevi Anbuselvam, 11/04/2023, 2:09 pm

Page Layouts

Standard Object Layouts

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Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway	Payment Gateway Layout [View Assignment]
Asset State Period	Asset State Period Layout [View Assignment]	Payment Gateway Log	Payment Gateway Log Layout [View Assignment]

student

[Details \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Fields & Relationships \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

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[Compact Layouts \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Field Sets \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Object Limits \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Record Types \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Related Lookup \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Search Layouts \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[List View Button Layout \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Restriction Rules \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Scoping Rules \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Triggers \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Flow Triggers \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

[Validation Rules \(/one/one.app#/setup/ObjectManager/0115/0000022q9q7/FieldsAndRelationships/00NSI00000KOS3w/view\)](#)

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
class	class_c	Number(18, 0)		▼
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
MARKS	MARKS_c	Number(18, 0)		▼
phone number	phone_number_c	Phone		▼
result	result_c	Picklist		▼
school	school_c	Master-Detail(school)		✓ ▼
student Name	Name	Text(80)		✓ ▼

parent

Details (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships)

Fields & Relationships (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships)

Page Layouts (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Lightning Record Pages (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Buttons, Links, and Actions (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Compact Layouts (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Field Sets (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Object Limits (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Record Types (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Related Lookup (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Filters (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Search Layouts (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

List View Button Layout (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Restriction Rules (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Scoping Rules (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Triggers (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Flow Triggers (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Validation Rules (/one/one.app#/setup/ObjectManager/011510000022027/FieldsAndRelationships/ParentAddress/view)

Fields & Relationships

6 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	CreatedBy	Lookup(User)		
(/lightning/setup/ObjectManager/011510000022027/FieldsAndRelationships/CreatedBy/view)				
Last Modified By	LastModifiedBy	Lookup(User)		
(/lightning/setup/ObjectManager/011510000022027/FieldsAndRelationships/LastModifiedBy/view)				
Owner	OwnerId	Lookup(User,Group)		✓
(/lightning/setup/ObjectManager/011510000022027/FieldsAndRelationships/Owner/view)				
Parent Address	Parent Address_c	Text Area(255)		
(/lightning/setup/ObjectManager/011510000022027/FieldsAndRelationships/00N5100000KOSGM/view)				
parent Name	Name	Text(80)		✓
(/lightning/setup/ObjectManager/011510000022027/FieldsAndRelationships/Name/view)				
Parent Number	Parent Number_c	Phone		
(/lightning/setup/ObjectManager/011510000022027/FieldsAndRelationships/00N5100000KOSMB/view)				

javascript

[Details \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships\)](#)

Fields & Relationships [//one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships](#)

[Page Layouts \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Lightning Record Pages \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Buttons, Links, and Actions \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Compact Layouts \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Field Sets \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Object Limits \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Record Types \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Related Lookup \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Search Layouts \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[List View Button Layout \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Restriction Rules \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Scoping Rules \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Triggers \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Flow Triggers \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

[Validation Rules \(/one/one.app#/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view\)](#)

Fields & Relationships

9 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 Area(255)		
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
Created By	CreatedById	Lookup(User)		
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
district	district_c	Text Area(255)		
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
Last Modified By	LastModifiedById	Lookup(User)		
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
Owner	OwnerId	Lookup(User/Group)		✓
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
phone number	phone_number_c	Phone		
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
school Name	Name	Text(80)		✓
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
school websites	school_websites_c	Text Area(255)		
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				
state	state_c	Text Area(255)		
(/lightning/setup/ObjectManager/0115/0000022oxl/FieldsAndRelationships/00N5/00000KOP6k/view)				



✓ [Apps](#)

[App Manager](#)

[./one/one.app#/setup/Navigation!](#)

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Q app ma

Apps

App Manager

/one/one-app#/setup/Navigation

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SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes \(https://help.salesforce.com/s/articleview?id=release-notes.m.forcecom.general.clone-apps.htm%26type=5%26release=240\)](https://help.salesforce.com/s/articleview?id=release-notes.m.forcecom.general.clone-apps.htm%26type=5%26release=240)

Enable App Cloning ☐

Disabled

26 items • Sorted by App Name • Filtered by All appmenutems - TabSet Type



	App Name	Developer Name	Description	Last N
1	All Tabs	AllTabSet		10/04
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/04
3	App Launcher	AppLauncher	App Launcher tabs	10/04
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	10/04
5	Community	Community	Salesforce CRM Communities	10/04
6	Content	Content	Salesforce CRM Content	10/04
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage...	10/04
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/04
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/04
10	Marketing	Marketing	Best-in-class on-demand marketing automation	10/04
11	Platform	Platform	The fundamental Lightning Platform	10/04
12	Queue Management	QueueManagement	Create and manage queues for your business.	10/04
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	10/04
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunitie...	10/04
15	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple reco...	10/04
16	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and f...	10/04
17	Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	10/04
18	school management	school_management		10/04
19	school management	student		10/04
20	school management	parent		10/04
21	school management	report		10/04
22	school management	dashboards		10/04
23	Service	Service	Manage customer service with accounts, contacts, cases, and ...	10/04
24	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple...	10/04
25	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-dro...	10/04
26	Subscription Mana...	RevenueCloudConsole	Get started automating your revenue processes	10/04



✓ User Interface

Loaded Console Tab Limit

[./one/one.app#/setup/ConsoleMa](#)

Rename Tabs and Labels

[./one/one.app#/setup/RenameTab](#)

Tabs

[./one/one.app#/setup/CustomTab](#)

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Q tab

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[Tabs](#)

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[SETUP](#)

Tabs

Custom Object Tab

parents

Below is the information for the custom tab. Click Edit to ch
tab.

Custom Tab Definition Detail

Edit

Delete

Tab Label	parents	Tab Style	
Object	parent	Splash Page Custom Link	
Description			
Created By	Sheeladevi Anbuselvam , 10/04/2023, 2:31 pm	Modified By	Sheeladevi A 10/04/2023,

parent

Details (/one/one.app#/setup/O

[Fields & Relationships](#) /one/one.app#/set

[Page Layouts](#) /one/one.app#/setup/O

[Lightning Record Pages](#) /one/one.app#/setup/O

[Buttons, Links, and Actions](#) /one/one.app#/setup/O

[Compact Layouts](#) /one/one.app#/setup/O

[Field Sets](#) /one/one.app#/setup/Obj

[Object Limits](#) /one/one.app#/setup/Obj

[Record Types](#) /one/one.app#/setup/Ob

[Related Lookup Filters](#) /one/one.app#/setup/Ob

[Search Layouts](#) /one/one.app#/setup/Ob

[List View Button Layout](#) /one/one.app#/setup/Obj

[Restriction](#)

Details

Edit

Delete

Description

API Name

parent__c

Custom

✓

Singular Label

parent

Plural Label

parents

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help

Window



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(/one/one.app#/setup/RenameTab

Tabs

(/one/one.app#/setup/CustomTab

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[Tabs](#)

[\(/one/one.app#/setup/CustomTab](#)

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[SETUP](#)

Tabs

Custom Object Tab

schools

Below is the information for the custom tab. Click Edit to
tab.

Custom Tab Definition Detail

Edit

Delete

Tab Label	schools	Tab Style	
Object	school	Splash Page Custom Link	
Description			
Created By	Sheeladevi Anbuselvam, 10/04/2023, 2:25 pm	Modified By	Sheelade 10/04/202

student

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[Fields & Relationships](#) (/one/one.app#/setu

[Page Layouts](#) (/one/one.app#/setup/Ob

[Lightning Record Pages](#) (/one/one.app#/setup/O

[Buttons, Links, and Actions](#) (/one/one.app#/setup/O

[Compact Layouts](#) (/one/one.app#/setup/O

[Field Sets](#) (/one/one.app#/setup/Objec

[Object Limits](#) (/one/one.app#/setup/Obj

[Record Types](#) (/one/one.app#/setup/Obj

[Related Lookup Filters](#) (/one/one.app#/setup/Ob

[Search Layouts](#) (/one/one.app#/setup/Ob

[List View Button](#) (/one/one.app#/setup/Obj

Details

[Edit](#) [Delete](#)

Description

API Name
student__c

Custom
✓

Singular Label
student

Plural Label
students

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window



▼ User Interface

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Rename Tabs and Labels

[\[/one/one.app#/setup/RenameTab](#)

Tabs

[\[/one/one.app#/setup/CustomTab](#)

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[\(/one/one.app#/setup/ConsoleMa](#)

[Rename Tabs and Labels](#)
[\(/one/one.app#/setup/RenameTab](#)

[Tabs](#)
[\(/one/one.app#/setup/CustomTab](#)

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[SETUP](#)

Tabs

Custom Object Tab

[Help for this Page](#)

students

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Edit

Delete

Tab Label students

Tab Style

Books

Object [student](#)

Splash
Page
Custom
Link

Description

Created By [Sheeladevi Anbuselvam](#),
10/04/2023, 2:29 pm

Modified By [Sheeladevi Anbuselvam](#),
10/04/2023, 2:29 pm

[illegible]

4. Trailhead profile public URL

Team Lead – <https://trailblazer.me/id/hgahlot3>

Team member 1 – <https://trailblazer.me/id/hgahlot3>

Team member 2 – <https://trailblazer.me/id/hgahlot3>

PROJECT REPORT TEMPLATE

5. ADVANTAGES & DISADVANTAGES

Advantages:

It allows for more effective sales and marketing:

Having huge amounts of data on customer interactions enables an organisation to build up a clearer picture of its customers. It allows for deep insights to identify what the company is doing right as well as where it's weak when it comes to managing its customers.

It can speed up the sales conversion process:

A CRM system integrated within a marketing campaign allows insights into the interests of prospective customer. Once the client enters the sales funnel, qualification and conversion can be full or partly automated making it much faster. This whilst enhancing the sales experience, also frees up the sales team's time, enabling them to focus on closing high probability and/or high-value deals.

It increases staff productivity, lowers time costs and boosts morale:

Quaint as it may seem, paperwork is still a significant part of many businesses day-to-day operations. A lot of that paperwork could be eliminated with a CRM system. Cutting down on wasted time increases the ability of the employee to get on with the kind of work that brings real value to the organisation.

It enables widely dispersed teams to work closely:

Companies often have parts of their operations away from their home base for a multitude of reasons—cheaper operating costs, proximity to clients, or greater ease in providing on-site technical support.

Can improve customer loyalty through exceptional experience:

The hallmark of excellent **customer service** is being able to intelligently and quickly address queries and problems. This can only be achieved by being able to efficiently access customers data and transactional history allowing for instant familiarization with their context and needs.

Disadvantages:

Staff over-reliance on CRM may diminish customer loyalty through a bad experience.

If staff come to rely too heavily on **CRM software**, It reduces their flexibility in dealing with customer queries. They often become helpless in the face of questions from clients where the information isn't on the system and which requires lateral thinking to solve the problem.

Security concerns associated with centralised data.

There are risks associated with keeping a lot of data in one place. With stringent regulations surrounding data (GDPR, for example), businesses face severe penalties in the event of security breaches.

The excess initial time and productivity cost of implementation.

There will be a steep learning curve for staff with any new system. It will take some time for employees to find their feet with the CRM system and mistakes will be made. Its for the management team to ensure that there's adequate buy – in and support in the process of transitioning.

It requires a process – driven sales organisation.

To maximize the return on investment(ROI) in a CRM system, it is necessary to have a process – driven sales regime. A CRM can be used simply

as a data store that can be mined for insights, assuming that the data is updated consistently.

It may not suit every business.

Certain businesses where customer transactions are highly standardised may not benefit from a CRM system.

6. Applications:

Centralized Leads

All the leads/inquiries from various sources like Facebook, Google Ads, Justdial, Sulekha, API, Websites, and Landing Pages will be added to the CRM directly including bulk uploads.

Advanced Automation

Manage all kind of automation including auto allocate of leads to sales team, manage them and to be in touch with your leads, prospects or customers in a simplified manner.

7. Conclusion

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty. However, in order to be successful in these aims, the different company departments have to work together and use measures in a coordinated fashion. This purpose is achieved via a customer database which is analyzed and updated using CRM software.

This approach will be of particular interest to companies operating in highly competitive markets where it is difficult to attract new customers.

8. Future scope

The future of CRM is bright. CRM will continue to report key data and give insight for future action, however, leading experts see CRM evolving to [measure and inform sales enablement](#) and customer engagement while playing a tremendous role in the success of future business.

At this session of Dreamforce, led by John Taschek Senior Vice President of Market Strategy at Salesforce, panelists Paul Greenberg, Denis Pombriant, and Ray Wang weigh in on important considerations for the future of sales, marketing, and customer engagement. These leading CRM experts recommend the following measures for future-proofing your company's sales:

