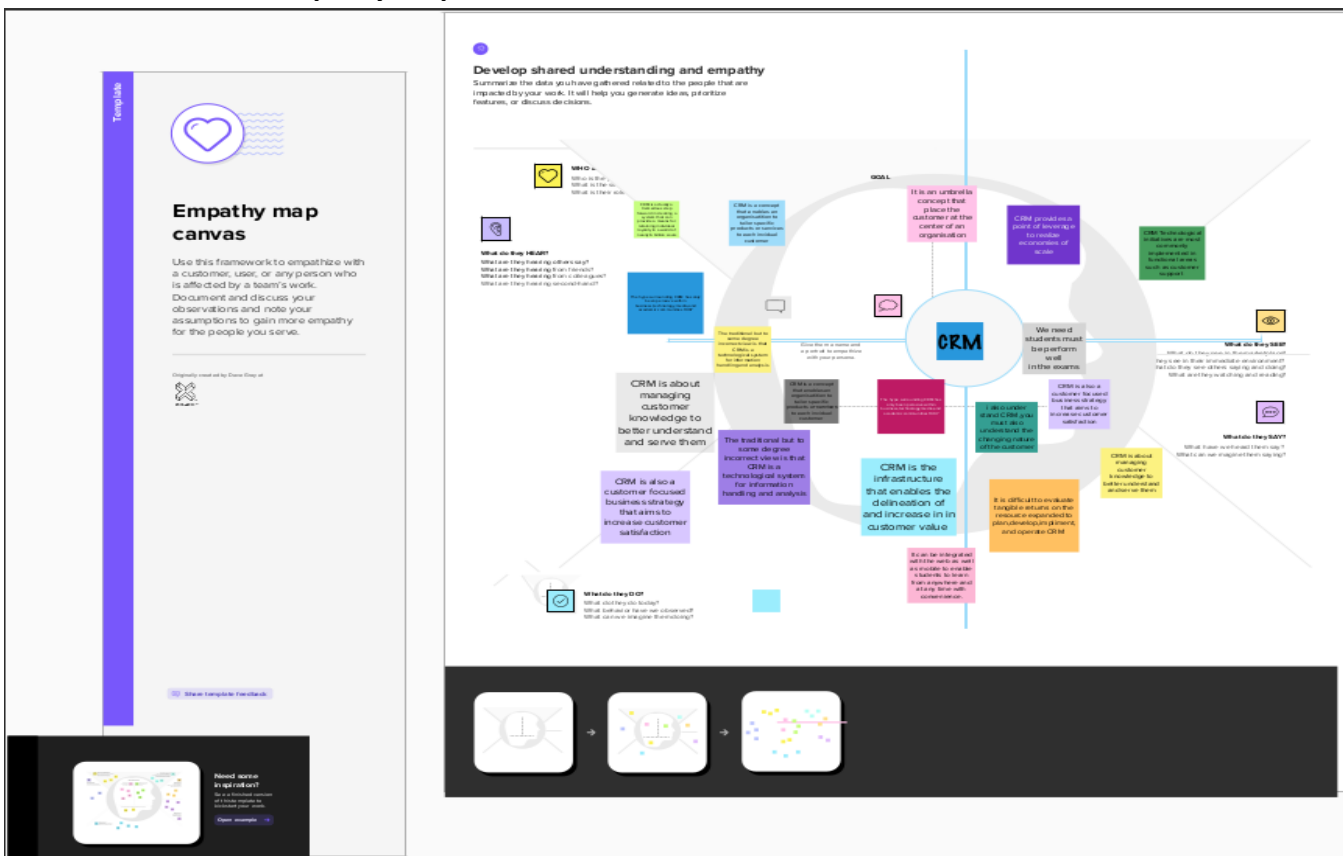


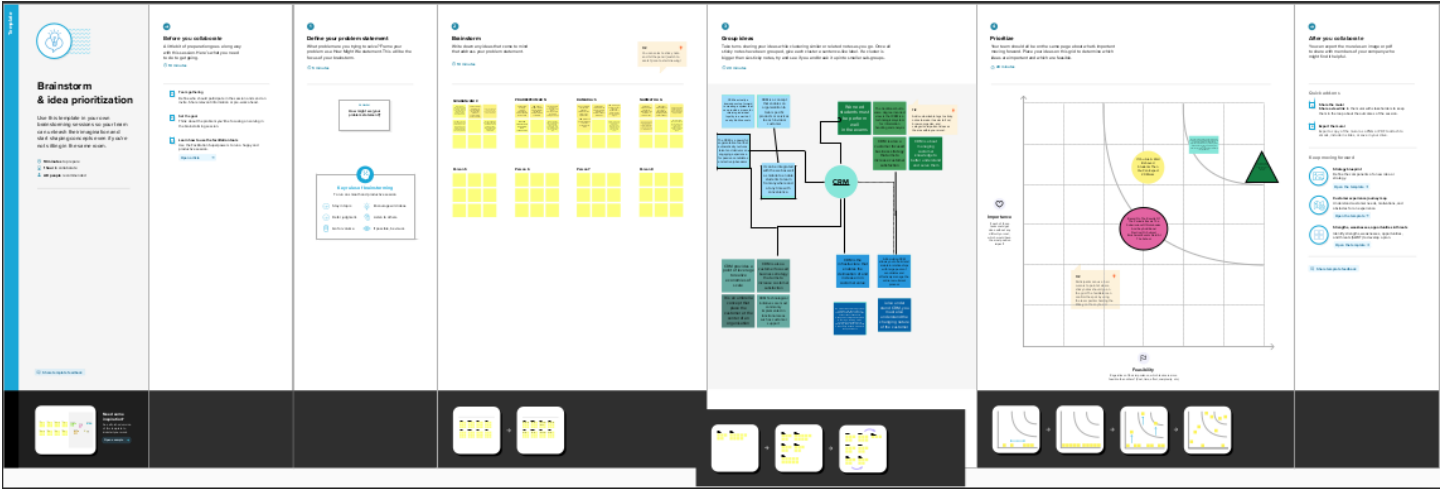
1 INTRODUCTION

1.2 PURPOSE

2 Problem Definition & Design Thinking



2.2. Ideation & Brainstorming Map



3 RESULT

3.1 Data Model

Object name	Fields in the Object																
School	<table> <tr> <th>Field Label</th><th>Data Type</th></tr> <tr> <td>Address</td><td>Text Area</td></tr> <tr> <td>District</td><td>Text Area</td></tr> <tr> <td>State</td><td>Text Area</td></tr> <tr> <td>school</td><td>Text Area</td></tr> <tr> <td>Phone Number</td><td>Phone</td></tr> <tr> <td>Number of Students</td><td>Roll-up summery</td></tr> <tr> <td>Highest Marks</td><td>Roll-up summery</td></tr> </table>	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
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																

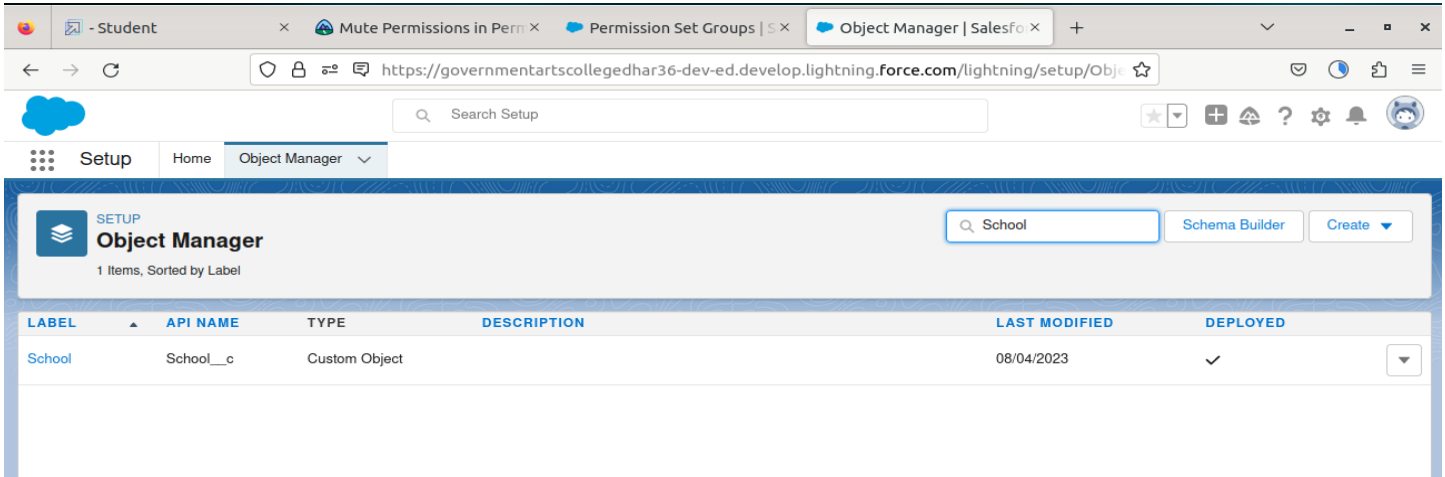
Object name	Fields in the Object												
Student	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Phone number</td><td>Phone</td></tr><tr><td>School</td><td>Master-Detail Relationship</td></tr><tr><td>Results</td><td>Picklist</td></tr><tr><td>Class</td><td>Number</td></tr><tr><td>Marks</td><td>Number</td></tr></table>	Field Label	Data Type	Phone number	Phone	School	Master-Detail Relationship	Results	Picklist	Class	Number	Marks	Number
Field Label	Data Type												
Phone number	Phone												
School	Master-Detail Relationship												
Results	Picklist												
Class	Number												
Marks	Number												
Parent	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Parent Address</td><td>Text Area</td></tr><tr><td>Parent Number</td><td>Phone</td></tr></table>	Field Label	Data Type	Parent Address	Text Area	Parent Number	Phone						
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



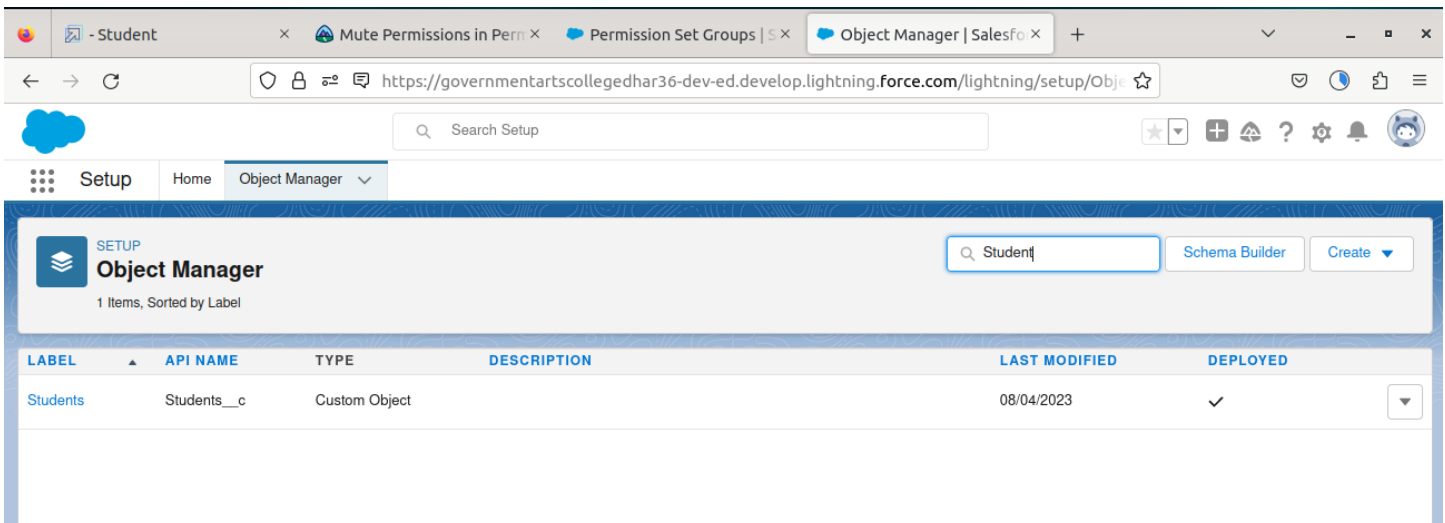
The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Objc>. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'Object Manager' and shows '1 Items, Sorted by Label'. A search bar contains the text 'School'. Below the search bar is a table with the following data:

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



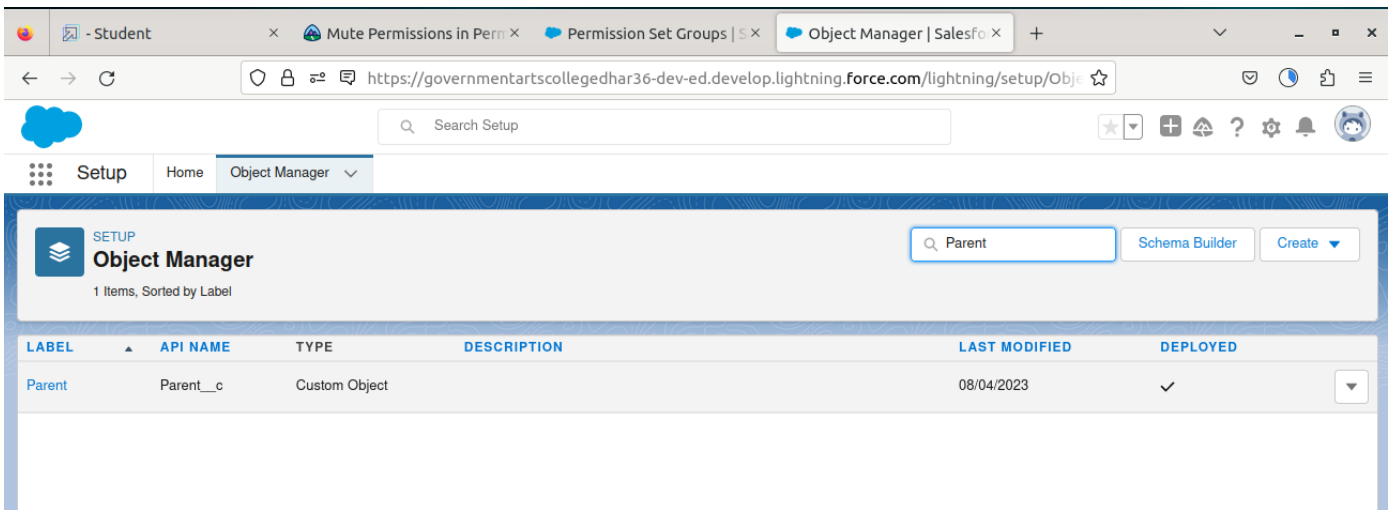
The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Objc>. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'Object Manager' and shows '1 Items, Sorted by Label'. A search bar contains the text 'Student'. Below the search bar is a table with the following data:

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



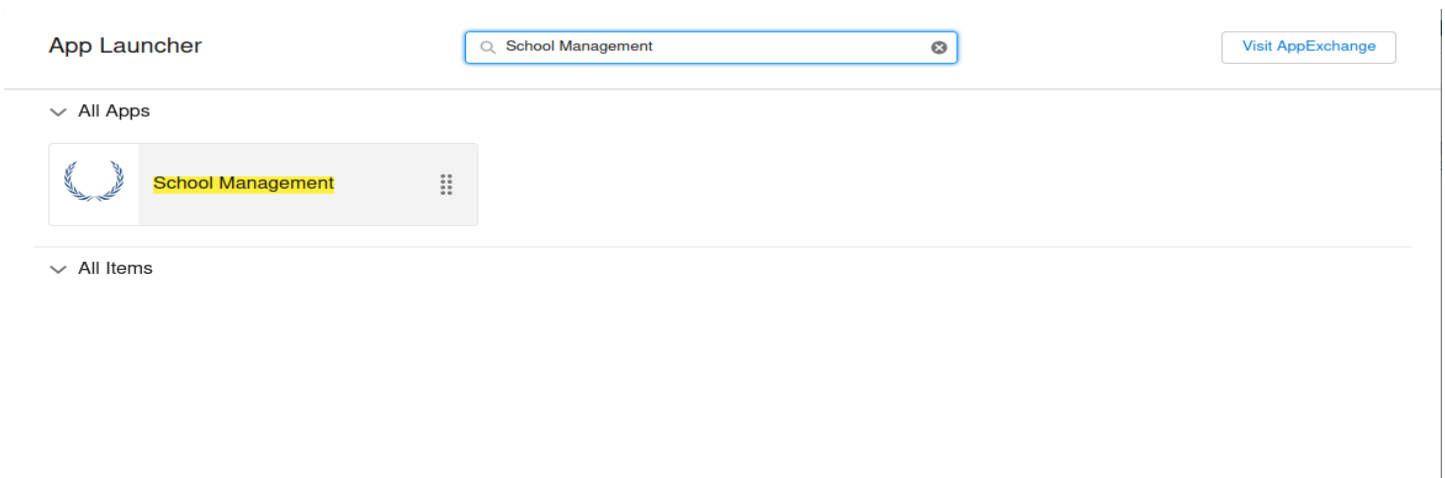
The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/ObjManager>. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'Object Manager' and shows '1 Items, Sorted by Label'. A search bar contains the text 'Parent'. Below the search bar is a table with the following data:

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



The screenshot shows the App Launcher interface. The header includes the text 'App Launcher', a search bar with the text 'School Management', and a button labeled 'Visit AppExchange'. Below the header is a section titled 'All Apps' which contains a card for the 'School Management' app. The card features a laurel wreath icon and the text 'School Management'. Below the 'All Apps' section is a section titled 'All Items'.

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-1 : Creation of fields for the School Objects

Creation of fields for the School Object

Browser tabs: - Student, Mute Permissions in Perm..., Permission Set Groups | S..., School | Salesforce

Address bar: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj...>

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
School

Details

Fields & Relationships
11 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)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Students)		
Last Modified By	LastModifiedById	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)	✓
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Related Lookup Filters

School Websites	School_Websites__c	Text Area(255)
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Search Layouts

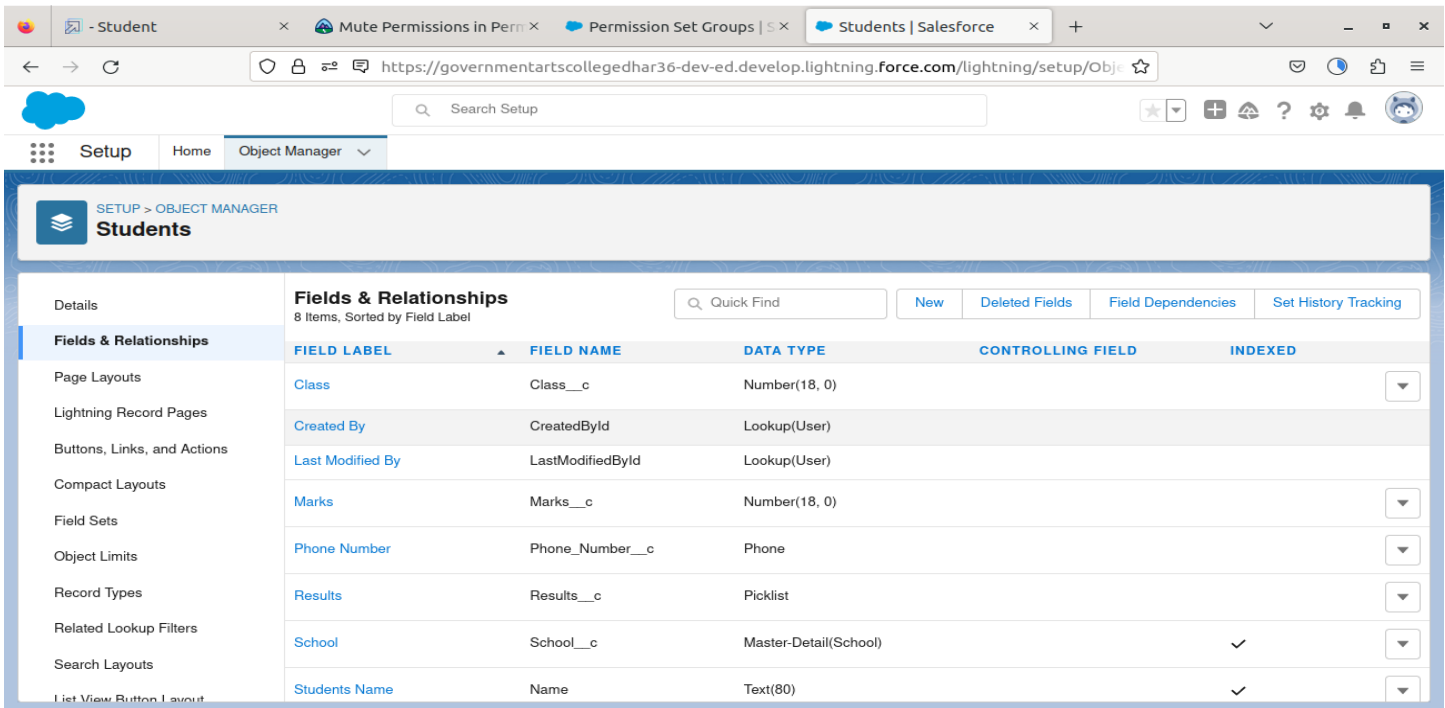
State	State__c	Text Area(255)
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List View Button Layout

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-2 : Creation of fields for the Student Objects

Creation of fields for the Student Object



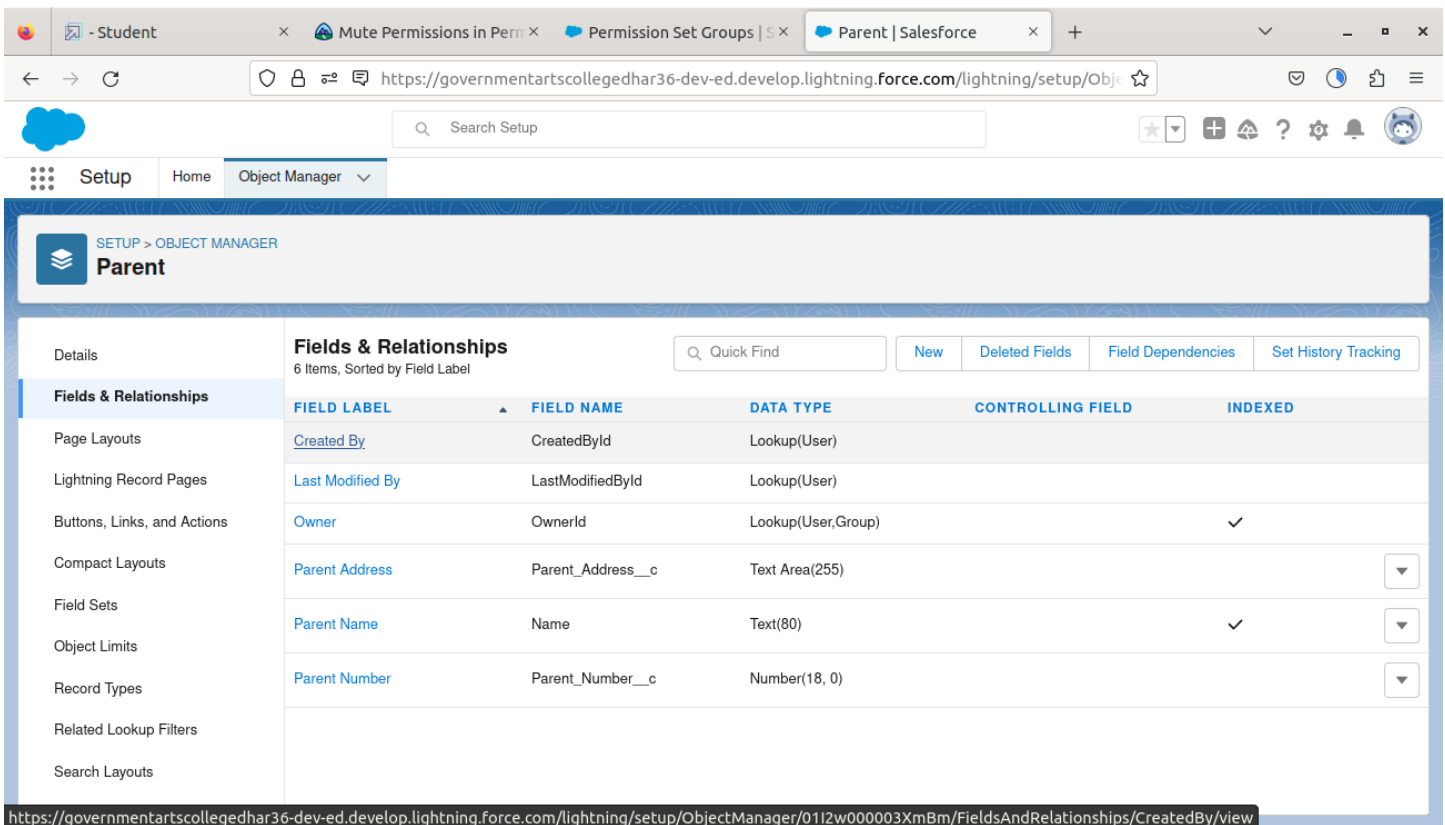
The screenshot shows the Salesforce Setup interface for the 'Students' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main content area is titled 'Fields & Relationships' and shows a list of 8 fields. The fields are sorted by Field Label. The table below lists the fields:

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 like Details, Fields & Relationships, Page Layouts, and others. The main content area is titled 'Fields & Relationships' and shows a list of 6 fields. The fields are sorted by Field Label. The table below lists the fields:

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)		

<https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XmBm/FieldsAndRelationships/CreatedBy/view>

(Milestone-5: PROFILE)

Activity-1 : Creation on Profile

Creation on Profiles

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

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

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

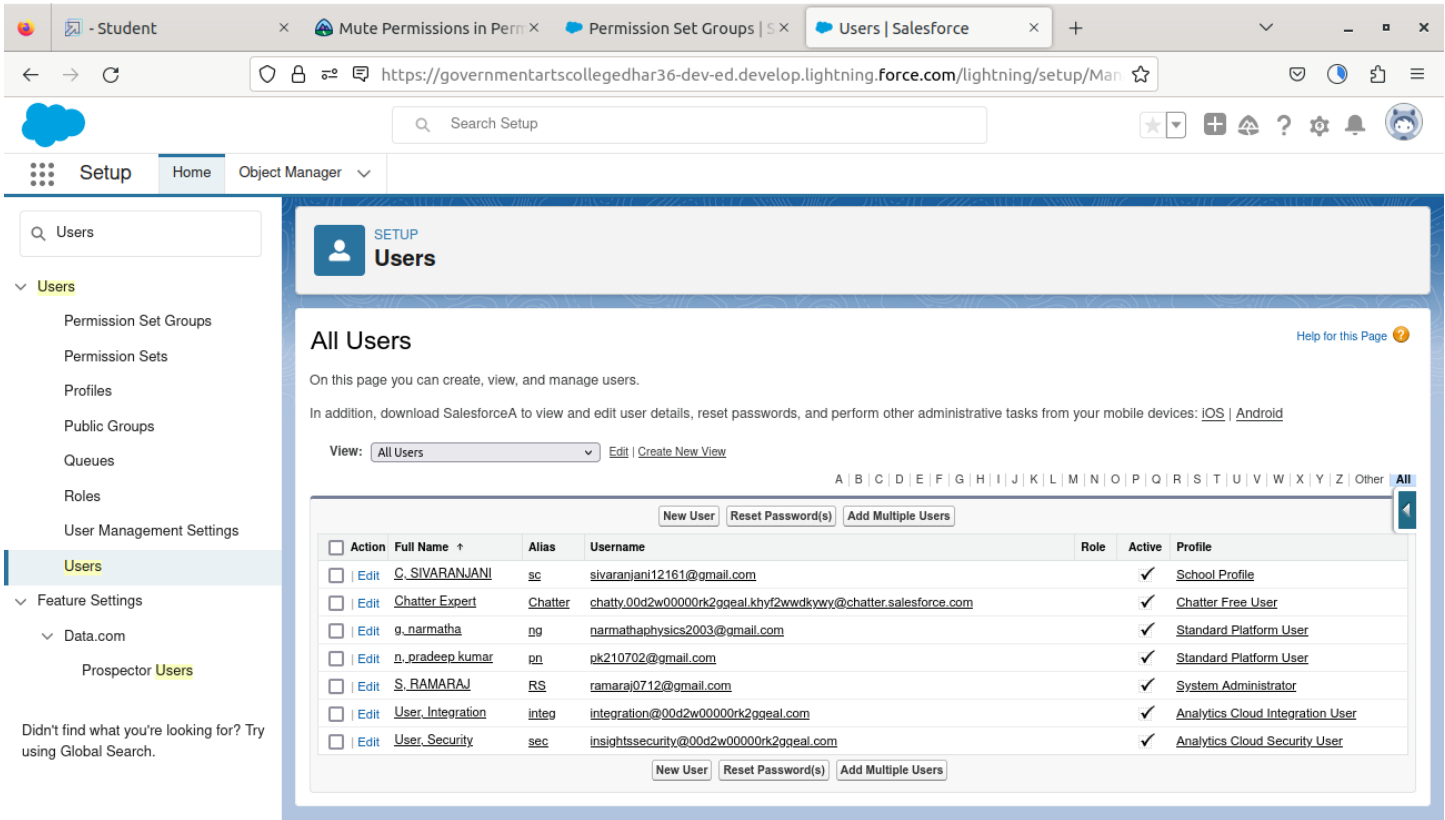
1-7 of 7 0 Selected

Page 1 of 1

(Milestone-6: USERS)

Activity-1 : Creating a Users

Creating a Users



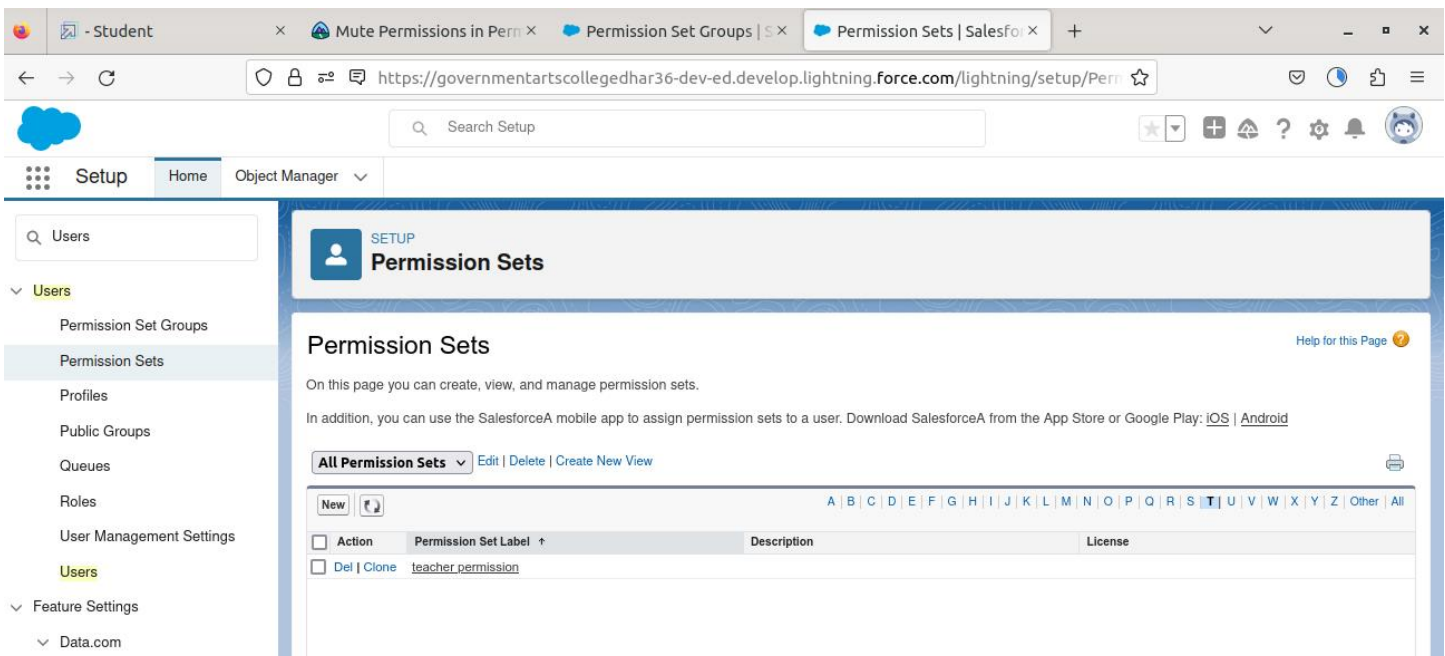
The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled "All Users" and includes a search bar, a view selector (set to "All Users"), and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including C. SIVARANJANI, Chatter Expert, g. narmatha, n. pradeep kumar, S. RAMARAJ, User Integration, and User Security. Each user has an "Edit" link and a checkbox for selection. Below the table are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	C. SIVARANJANI	sc	sivaranjani12161@gmail.com		✓	School Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w0000rk2gqeal.khyf2wwdlywyw@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	g. narmatha	ng	narmathachysics2003@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	n. pradeep kumar	pn	pk210702@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	S. RAMARAJ	RS	ramara0712@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w0000rk2gqeal.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w0000rk2gqeal.com		✓	Analytics Cloud Security User

(Milestone-7: PERMISSION SETS)

Activity-1 : Permission sets 1:

To Set Permissions



The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled "Permission Sets" and includes a search bar, a view selector (set to "All Permission Sets"), and a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The table lists one permission set, "teacher_permission", with a "Del" link and a checkbox for selection. Below the table are buttons for "New", "Clone", and "Delete".

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	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 navigation menu with options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. One permission set is listed: 'Del | Clone' with the label 'Principal permission'.

Action	Permission Set Label	Description	License
Del Clone	Principal permission		

(Milestone-8: REPORTS)

Activity-1 : Reports

Reports

The screenshot shows the Salesforce Reports page. The left sidebar contains a navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More. The main content area is titled 'Reports' and includes a search bar, a 'New Report' button, and a table of recent reports. The table has columns for Reports, R..., Description, Folder, Created By, C, and Subscribed. Four reports are listed: 'SUDEN TS', 'New Schools Report', 'PAREN TS', and 'New Accounts Report'.

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						
Public Reports	New Schools Report		RAM	RAMARAJ S	8/4/2023, 5:53 pm	✓
All Reports						
FOLDERS	PAREN TS		Private Reports	RAMARAJ S	9/4/2023, 9:23 pm	✓
All Folders						
Created by Me	New Accounts Report		Private Reports	RAMARAJ S	17/3/2023, 9:40 pm	✓
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/sivac51>

Team Member 1 - <https://trailblazer.me/id/pradn91>

Team Member 2- <https://trailblazer.me/id/rama0712>

Team Member 3 - <https://trailblazer.me/id/narmg3>

5 ADVANTAGES & DISADVANTAGE

Advantages

1. 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.

2. 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.

3. 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.

4. 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.

5. 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.

6. 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.

7. 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.

