

PROJECT REPORT TEMPLATE

1 INTRODUCTION

Overview

Customer Relationship Management (CRM) software is used by businesses to manage interaction with current and future customers.

Today's CRM have evolved into a confluence of multiple functions but the primary objective of a CRM is to serve the customers better, increase retention and manage the sales pipeline.

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.

Ideation and brainstorming map

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[illegible]

3 RESULT

Data Model:

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OBJECT NAME	FIELDS IN THE OBJECT	
Student		
	FIELD LABEL	DATA TYPE
	Class	Number(18, 0)
	Created by	Lookup(User)
	Last modified by	Lookup(User)
	Marks	Number(18, 0)
	Parent address	Test area(255)
	Parent number	<u>Phone</u>
	Results	<u>Picklist</u>
	School	<u>Master Detail(school)</u>
	Students name	<u>Test</u>
Parent		
	FIELD LABEL	DATA TYPE
	Created By	Lookup(User)
	Last Modified By	Lookup(User)
	Owner	Lookup(User, Group)
	Parent Name	Test(80)

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School	FIELD LABEL	DATA TYPE
	Address	Text Area(255)
	Created By	Lookup(User)
	District	Text Area(255)
	Highest marks	Roll-Up Summary(MAX students)
	Last Modified By	Lookup(User)
	Number of students	Roll-Up Summary(COUNT students)
	Phone number	Phone
	School	Text Area(255)
	School Name	Text(80)
	schools	Master-Details(school)
	state	Text Area(255)

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Mark		
	FIELD LABEL	DATA TYPE
	Created By	Lookup(User)
	Last Modified By	Lookup(User)
	Mark Name	Text(80)
	Owner	Lookup(User, Group)
Schools		
	FIELD LABEL	DATA TYPE
	Created By	Lookup(User)
	Last Modified By	Lookup(User)
	Owner	Lookup(User, Group)
	School Name	Text(80)

Activities and screenshots

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Activity1:

The screenshot shows the Salesforce Setup interface for the 'Students' object. The left sidebar lists various configuration options, and the main area displays the 'Details' for the object.

Details	
Description	
API Name	Student__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Students
Plural Label	Students
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Activity2:

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar lists various configuration options, and the main area displays the 'Details' for the object.

Details	
Description	
API Name	Parent__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Parent
Plural Label	Parents
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

javascriptvoid(0);

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Activity3:

The screenshot shows the Salesforce Setup interface for the 'School' object in the Object Manager. The left sidebar lists various configuration options, and the main area displays the details for the 'School' object.

Details	Details
Fields & Relationships	Description
Page Layouts	API Name: School__c
Lightning Record Pages	Custom: <input checked="" type="checkbox"/>
Buttons, Links, and Actions	Singular Label: School
Compact Layouts	Plural Label: Schools
Field Sets	Enable Reports: <input checked="" type="checkbox"/>
Object Limits	Track Activities: <input type="checkbox"/>
Record Types	Track Field History: <input type="checkbox"/>
Related Lookup Filters	Deployment Status: Deployed
Search Layouts	Help Settings: Standard salesforce.com Help Window
List View Button Layout	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

javascriptvoid(0);

Activity4:

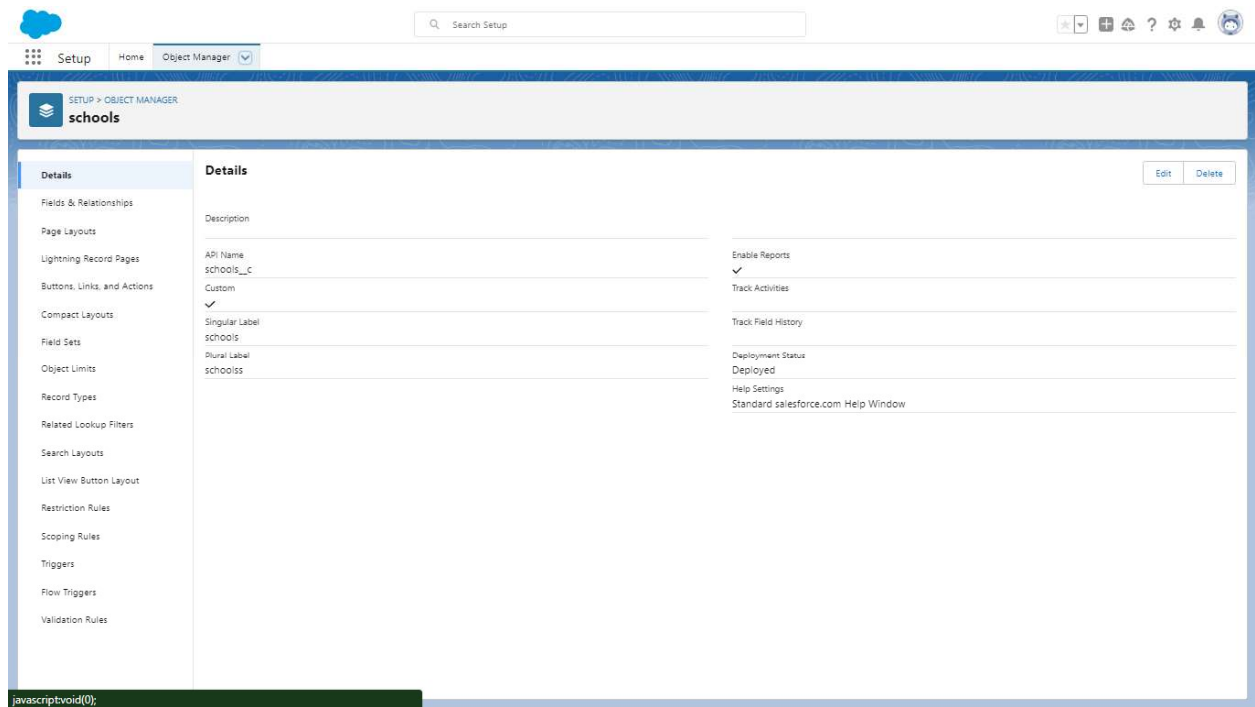
The screenshot shows the Salesforce Setup interface for the 'Mark' object in the Object Manager. The left sidebar lists various configuration options, and the main area displays the details for the 'Mark' object.

Details	Details
Fields & Relationships	Description
Page Layouts	API Name: Mark__c
Lightning Record Pages	Custom: <input checked="" type="checkbox"/>
Buttons, Links, and Actions	Singular Label: Mark
Compact Layouts	Plural Label: Marks
Field Sets	Enable Reports: <input checked="" type="checkbox"/>
Object Limits	Track Activities: <input type="checkbox"/>
Record Types	Track Field History: <input type="checkbox"/>
Related Lookup Filters	Deployment Status: Deployed
Search Layouts	Help Settings: Standard salesforce.com Help Window
List View Button Layout	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

javascriptvoid(0);

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Activity5:



4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/kaaviya2121>

Team Member 1- <https://trailblazer.me/id/priya1919>

Team Member 2- <https://trailblazer.me/id/savitha1201>

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

5 ADVANTAGES & DISADVANTAGES

List of advantages

- ✓ Reduction in the cost of expenses
- ✓ Improving the quality of service/product

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- ✓ Improving the organization management process
- ✓ Increased customer loyalty
- ✓ Track and increase the number of potential clients
- ✓ History of work with each student
- ✓ Relevant and visual MIS analytics reports
- ✓ Easy integrating with third party services
- ✓ Planning and multitasking
- ✓ Easy implementation
- ✓ Increase in repeat courses sales
- ✓ Elimination of errors in processes

List of disadvantages

- ❖ CRM costs. One of the greatest challenges to CRM implementation is cost....
- ❖ Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation....
- ❖ Poor communication....
- ❖ Lack of leadership....

6 APPLICATIONS

CRM Solutions:

A customer relationship management(CRM) solution helps you find new customers, win their business, and keep them happy by organising customer and prospect information in a way that helps you

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build stronger relationships in a way that helps you build stronger relationships with them and grow your business faster.

7 CONCLUSION

It would probably be particularly difficult to develop and install customer centric strategies. If CRM is used must be with the backing of those at the highest level and it must be planned carefully. A process must be gone through which would take note of CRM theory and use the experiences of others to maximise the chances of success.

8 FUTURE SCOPE

- ✦ Customer satisfaction has replaced customer experience as the top sales metric.
- ✦ To meet customer-centric goals, CRM systems need to evolve with greater precision and predictive analytics, as well as a focus on customer needs and behaviour.
- ✦ As AI becomes more prominent in the sales space reps will transition to more customer-care-focused tasks.
- ✦ CRM solutions act as a single source of truth for organizations looking to unify operations across departments.
- ✦ Organizations seek to automate rudimentary, day-to-day functions to allow staff to focus on more pressing tasks.
- ✦ As customers increasingly demand hyper-personalized experiences, CRMs are adapting to deliver mass personalization at scale...