

Project Report Template

CRM-APPLICATION FOR SCHOOL/COLLEGES

1 INTRODUCTION

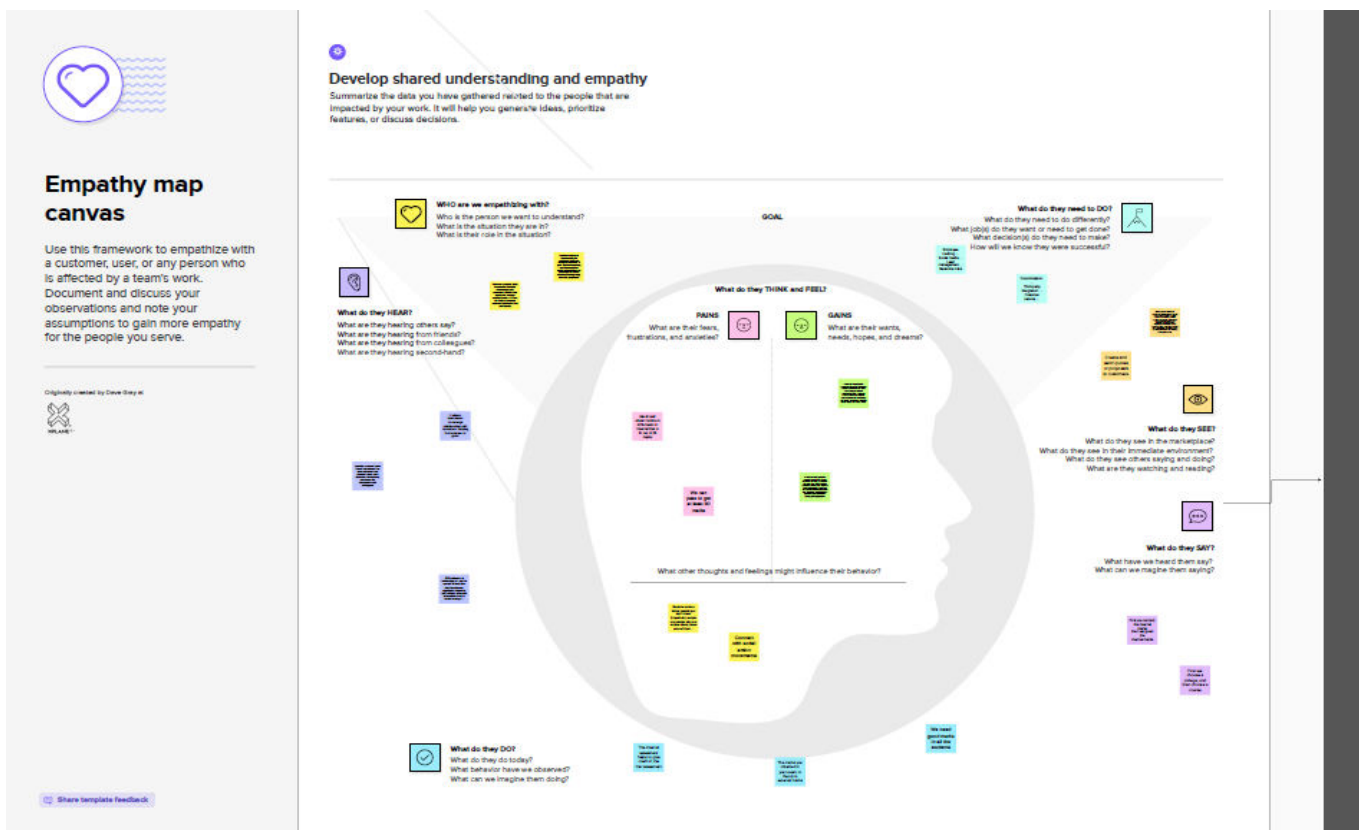
1.1 Overview

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.

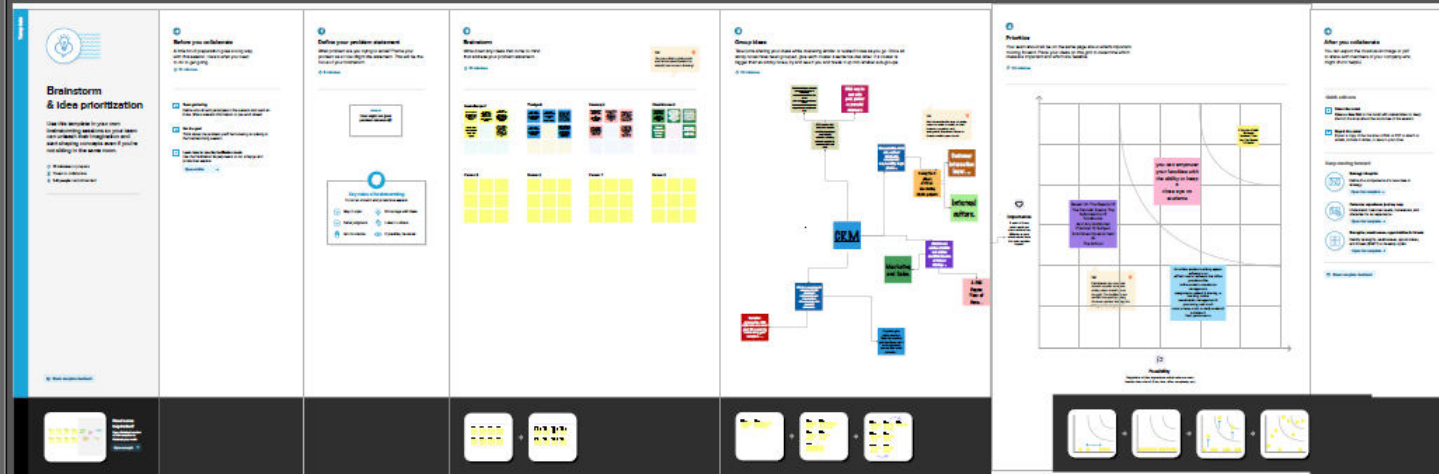
1.2 PURPOSE

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



2.2. Ideation & Brainstorming Map



3 RESULT

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

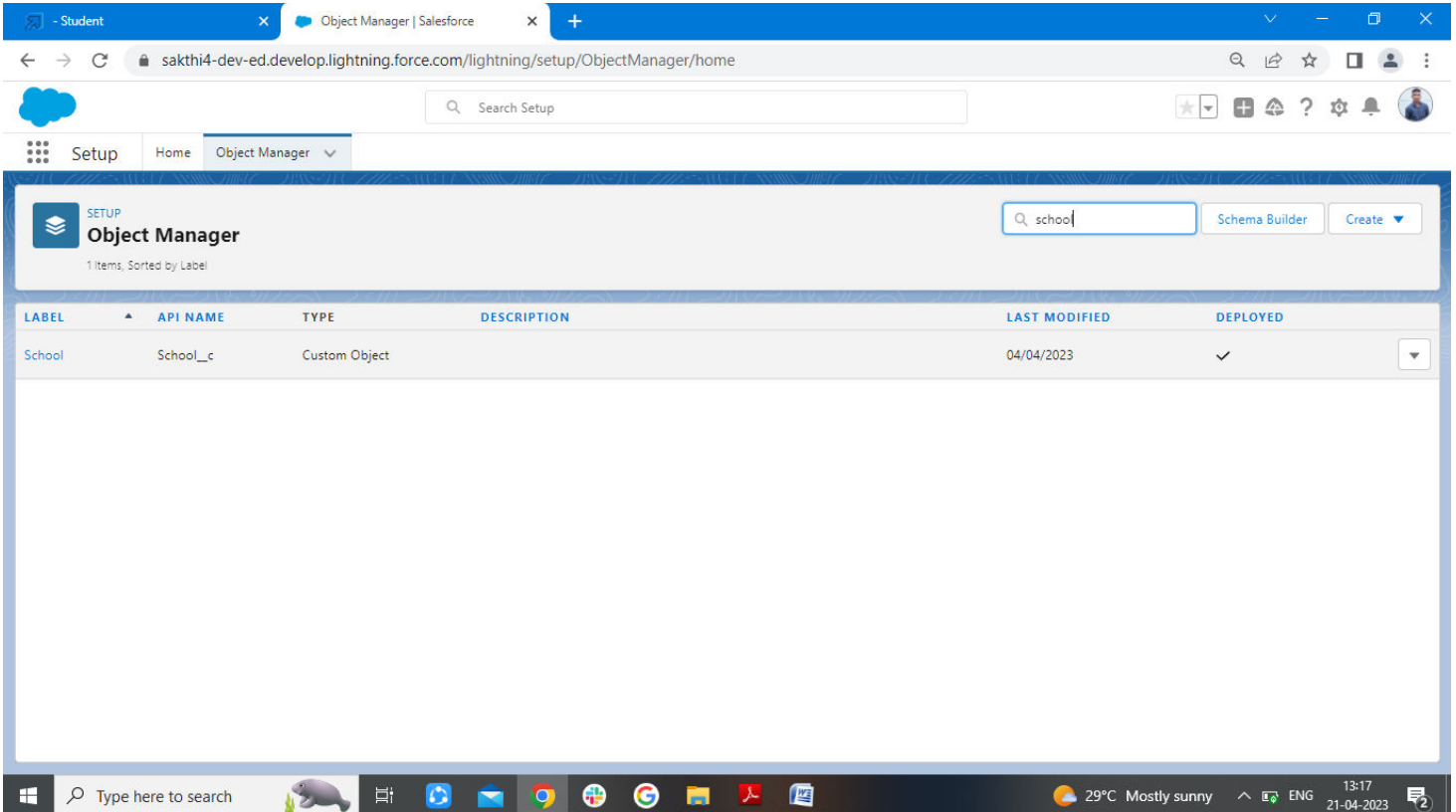
Object name	Fields in the Object												
Student	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Phone number</td><td>Phone</td></tr><tr><td>School</td><td>Master-Detail Relationship</td></tr><tr><td>Results</td><td>Picklist</td></tr><tr><td>Class</td><td>Number</td></tr><tr><td>Marks</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 displays the Salesforce Object Manager interface. The browser address bar shows the URL: `sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar with the text "Search Setup", and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" and shows a list of objects. A search bar at the top right of the list contains the text "school". Below the search bar, a table lists the objects. The table has columns for "LABEL", "API NAME", "TYPE", "DESCRIPTION", "LAST MODIFIED", and "DEPLOYED". The table contains one row for the "School" object, which is a "Custom Object" created on "04/04/2023" and is "DEPLOYED".

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

(Milestone-2:OBJECT)

Activity-2 : Create Student Object

Creation of Student Object

Object Manager | Salesforce

sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

SETUP Object Manager

1 Items, Sorted by Label

student

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
student	student__c	Custom Object		01/04/2023	✓

Type here to search

29°C Mostly sunny

ENG

13:18

21-04-2023

(Milestone-2: OBJECT)

Activity-2 : Create Parent Object

Creation of Parent Object

Object Manager | Salesforce

sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

Object Manager

1 Items, Sorted by Label

parent

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
parent	parent_c	Custom Object		01/04/2023	✓

Type here to search

29°C Mostly sunny 13:18 21-04-2023

(Milestone-3: LIGHTNING APP)

Activity-1 : Create the School Management App

Creation School Management App

Home | Salesforce

sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

App Launcher

school management

Visit AppExchange

▼ All Apps

sm school management

▼ All Items

PLATFORM TOOLS

10 items

Subscription Management

Apps

Feature Settings

parent

Custom Object Definition

Dismiss Tell Me More

Type here to search

29°C Mostly sunny 13:20 21-04-2023

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-1 : Creation of fields for the School Objects

Creation of fields for the School Object

The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 11 fields. The fields are sorted by Field Label. The table below shows the first 10 fields from the screenshot.

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 student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT student)		
Owner	OwnerId	Lookup(User,Group)		✓
phone number	phone_number__c	Phone		
School	School__c	Text Area(255)		

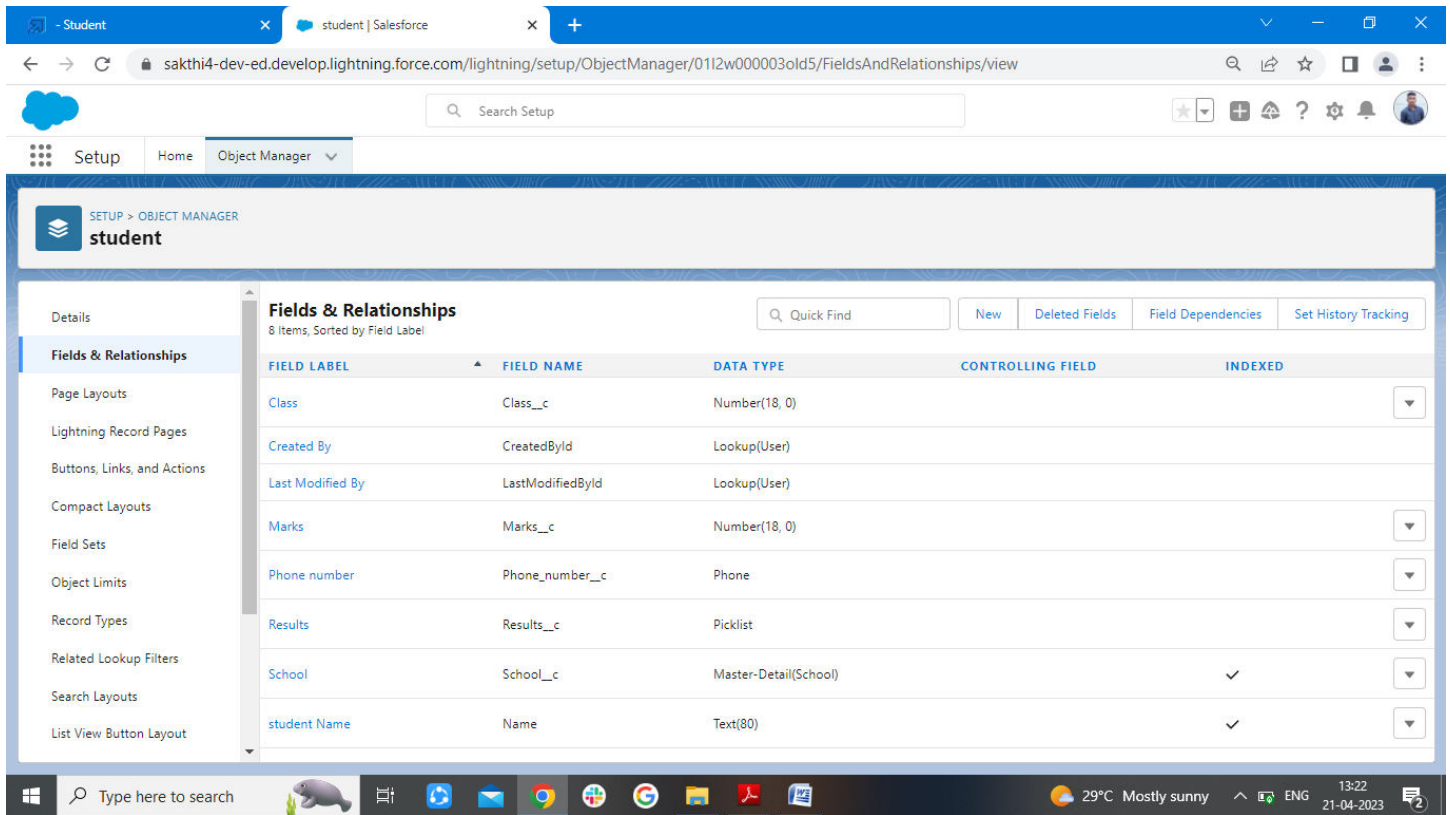
Below the screenshot, a continuation of the table is shown, containing the last three fields from the screenshot.

School Name	Name	Text(80)		✓
School Websites	School_Websites__c	Text Area(255)		
State	State__c	Text Area(255)		

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-2 : Creation of fields for the Student Objects

Creation of fields for the Student Object



The screenshot displays the Salesforce Object Manager interface for the 'student' object. The 'Fields & Relationships' section is active, showing a list of 8 fields. The table below summarizes the data presented in the interface.

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)		✓
student Name	Name	Text(80)		✓

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-3 : Creation of fields for the Parent Objects

Creation of fields for the Parents Object

parent | Salesforce

sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003ole8/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
parent

Details

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	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	Phone		

Type here to search

29°C Mostly sunny 13:22 21-04-2023

(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: `sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home`.

The Setup navigation bar includes links for Setup, Home, and Object Manager. The left sidebar shows the navigation menu with "Profiles" selected under the "Users" section.

The main content area displays the "Profiles" page. It includes a search bar, a "New Profile" button, and a table listing existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The profiles listed are:

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>

The table shows 1-25 of 40 profiles. The page is on Page 1 of 2.

(Milestone-6: USERS)

Activity-1 : Creating a Users

Creating a Users

Students | Salesforce

sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings

Users

- Feature Settings
 - Data.com
 - Prospector Users
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

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
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattyv0042w00000rk52weat.aejvvgttfs27@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Parents	pare	parents1234@gmail.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Principals	prin	principals098@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Sakthi_Kamaraj	KSakt	kamaraj.sakthi188@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Teachers	teac	teacher1435@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	User_Integration	integ	integration@0042w00000rk52weat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@0042w00000rk52weat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

https://sakthi4-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home

Type here to search

29°C Mostly sunny

13:24 21-04-2023

(Milestone-7: PERMISSION SETS)

Activity-1 : Permission sets 1:

To Set Permissions

Students | Salesforce

sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

per

Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets

Feature Settings

- Digital Experiences
 - Settings
- Functions
- Sales
 - Accounts
 - Person Accounts
- Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler Settings
 - Scheduling Policies

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

New

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	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	Teacher Permission		

1-1 of 1 0 Selected

Previous Next

Page 1 of 1

javascript:ListViewport.instances%5B%270082w00000cqEIQ%27%5D.getData%28%7B%27rolodexIndex%27%3A19%27D%29

Type here to search

29°C Mostly sunny

13:26 21-04-2023

(Milestone-7: PERMISSION SETS)

Activity-2 : Permission sets 2:

To Set Permissions

The screenshot shows the Salesforce 'Permission Sets' setup page. The browser address bar displays 'sakthi4-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home'. The page header includes 'Setup', 'Home', and 'Object Manager'. The left sidebar contains a search bar and navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', and 'Custom Code'. 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's functionality and a link to download the Salesforce mobile app. A table titled 'All Permission Sets' is displayed, showing a list of permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The first row shows a 'Principal permission' set. The table is currently empty except for the header row. The bottom of the page shows a Windows taskbar with various application icons and system information.

Setup

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
Del Clone	Principal permission		

1-1 of 1 | 0 Selected | Page 1 of 1

(Milestone-8: REPORTS)

Activity-1 : Reports

The screenshot shows the Salesforce 'Reports' page. The browser address bar displays 'sakthi4-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru'. The page header includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', and 'More'. The left sidebar contains a search bar and navigation links for 'Reports', 'Recent', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The main content area is titled 'Reports' and includes a 'Search recent reports...' bar. Below the search bar, there is a table titled 'Recent' showing a list of reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The first row shows a 'New Schools with students Report' created by 'Kamaraj Sakthi' on '4/4/2023, 12:58 pm'. The second row shows a 'New parents Report' created by 'Kamaraj Sakthi' on '4/4/2023, 1:00 pm'. The third row shows a 'Sample Flow Report: Screen Flows' created by 'Automated Process' on '11/3/2023, 9:57 am'. The bottom of the page shows a Windows taskbar with various application icons and system information.

Reports

Recent

3 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Schools with students Report		Private Reports	Kamaraj Sakthi	4/4/2023, 12:58 pm	
Created by Me	New parents Report		Private Reports	Kamaraj Sakthi	4/4/2023, 1:00 pm	
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	11/3/2023, 9:57 am	

1-1 of 1 | 0 Selected | Page 1 of 1

4 Trailhead Profile Public URL

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

Team Member 1 - <https://trailblazer.me/id/s506>

Team Member 2- <https://trailblazer.me/id/vinos38>

Team Member 3 - <https://trailblazer.me/id/ksakthi17>

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. CRM 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.

