

1 INTRODUCTION

1.1 Overview

CRM-Customer relationship management

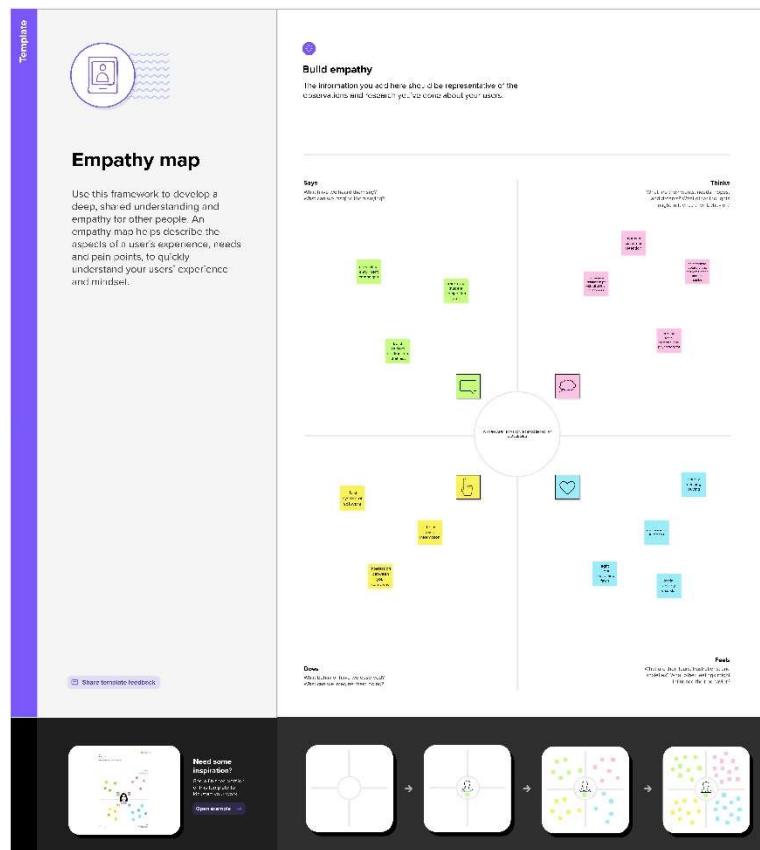
Software is a specialized tool designed to manage and track student interactions data and automate tasks related to student recruitment ,enrollment ,and retention

1.2 Purpose

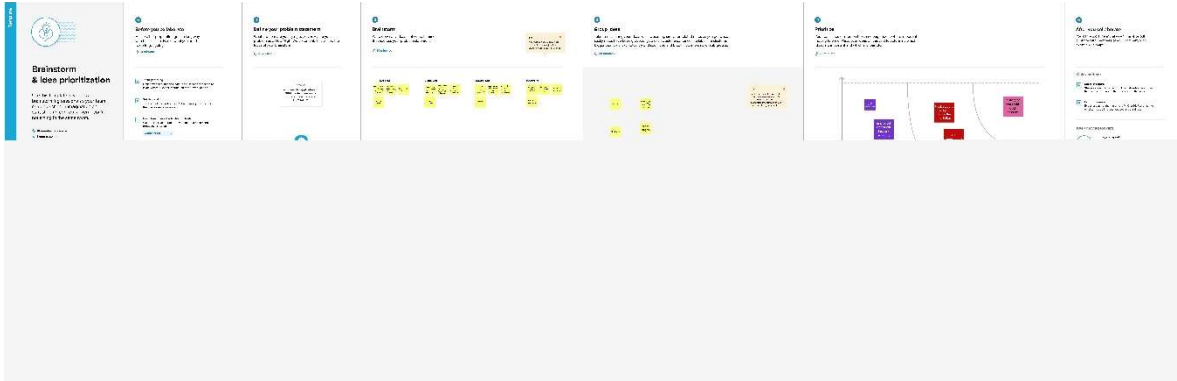
1. Improve business relationship
2. improve profitability
3. you will reduce the risk of missing opportunities

2 Problem Definition & Design Thinking

2.1 Empathy Map:



2.2 Ideation and Brainstorming map

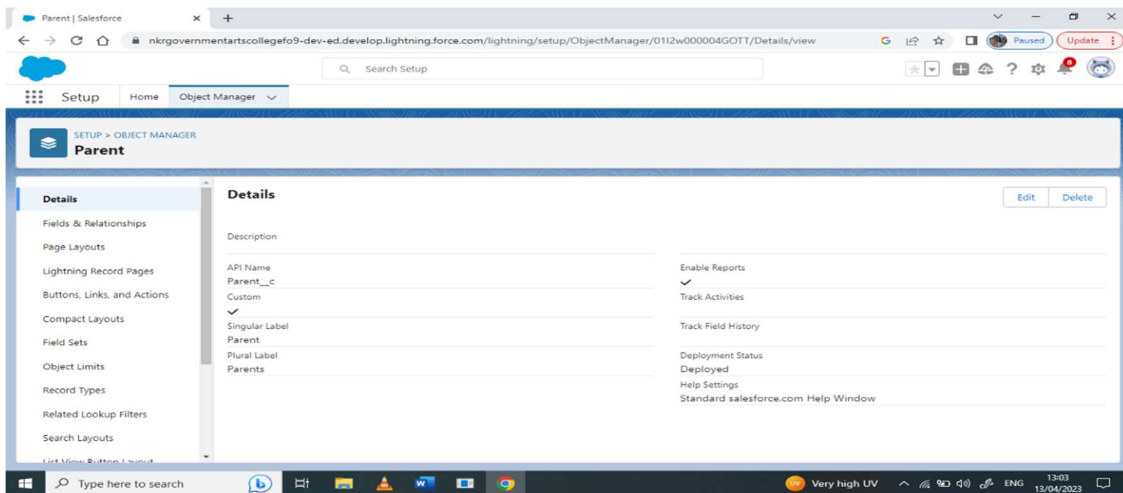
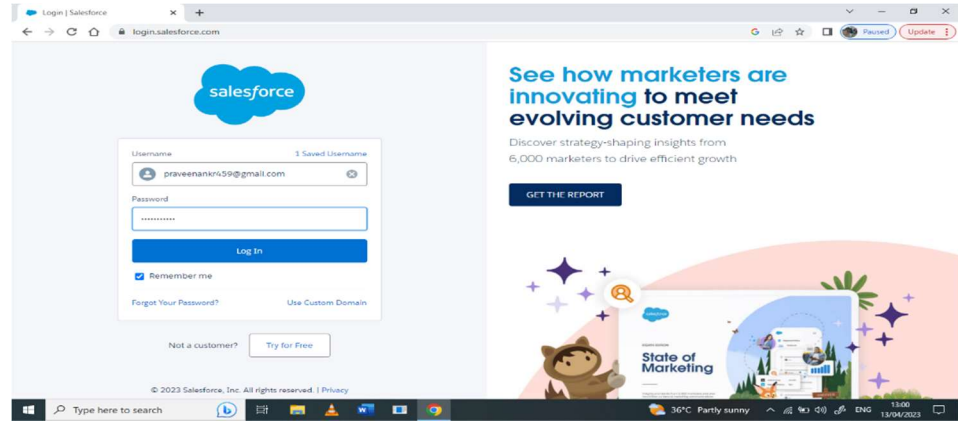


3 RESULT

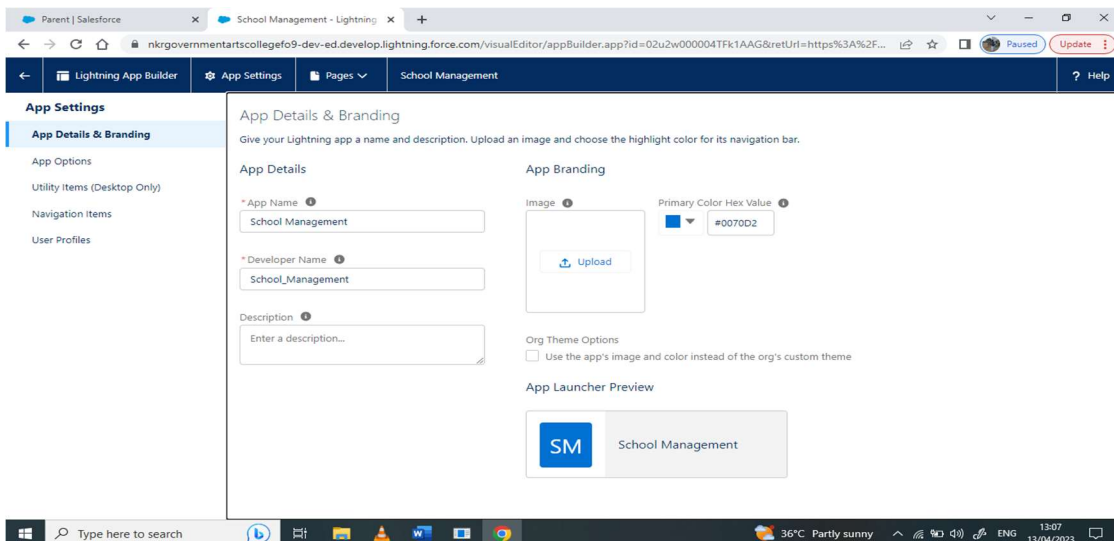
3.1 Data Model:

Object name	Fields in the Object	
School	Field lable	Data type
	Address	Text area
	Phone number	Phone
	Number of students	Roll-up summary
	Highest mark	Roll-up summary
Student	Field label	Data type
	Phone number	Phone
	School	Master-detail relationship
	Result	Picklist
	Class	Number
Parent	Field label	Data type
	Parent address	Text area
	Parent number	Phone

3.2 Activity & Screenshot

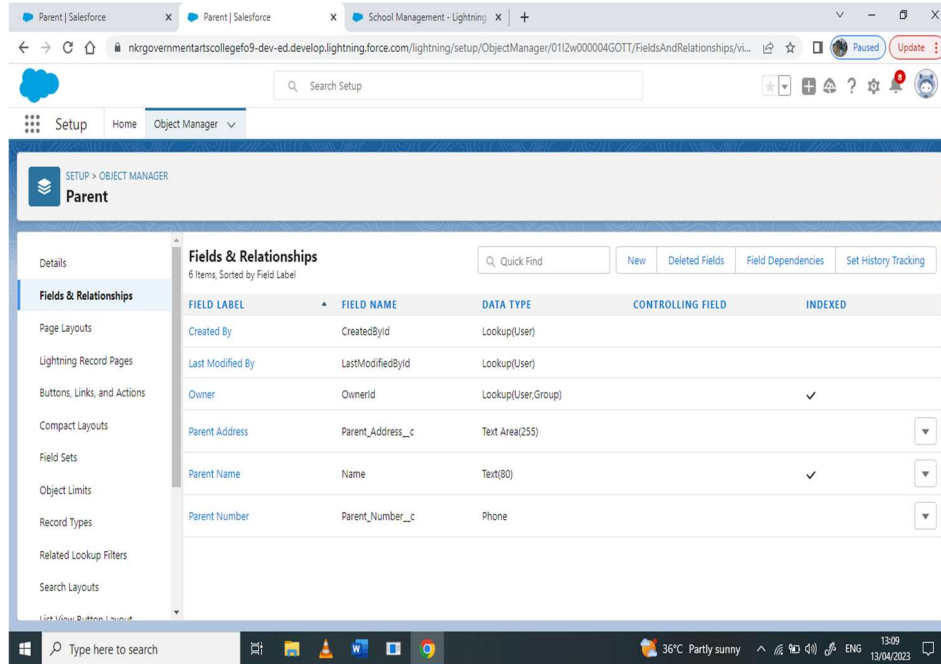


This field is useful for creating custom objects for students,schools,parents.



This field is useful for creating a data of custom fields

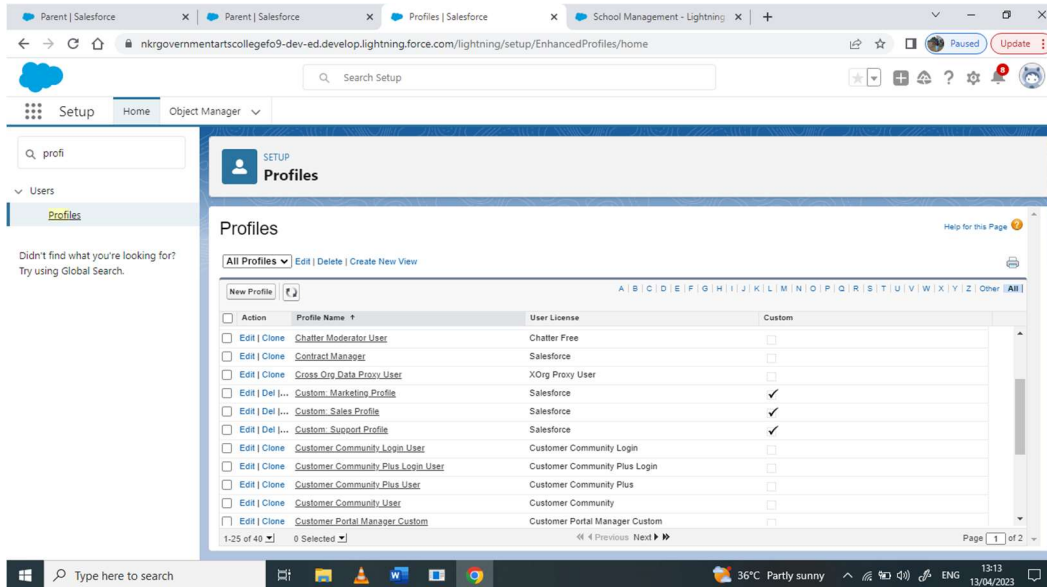
Project Report Template



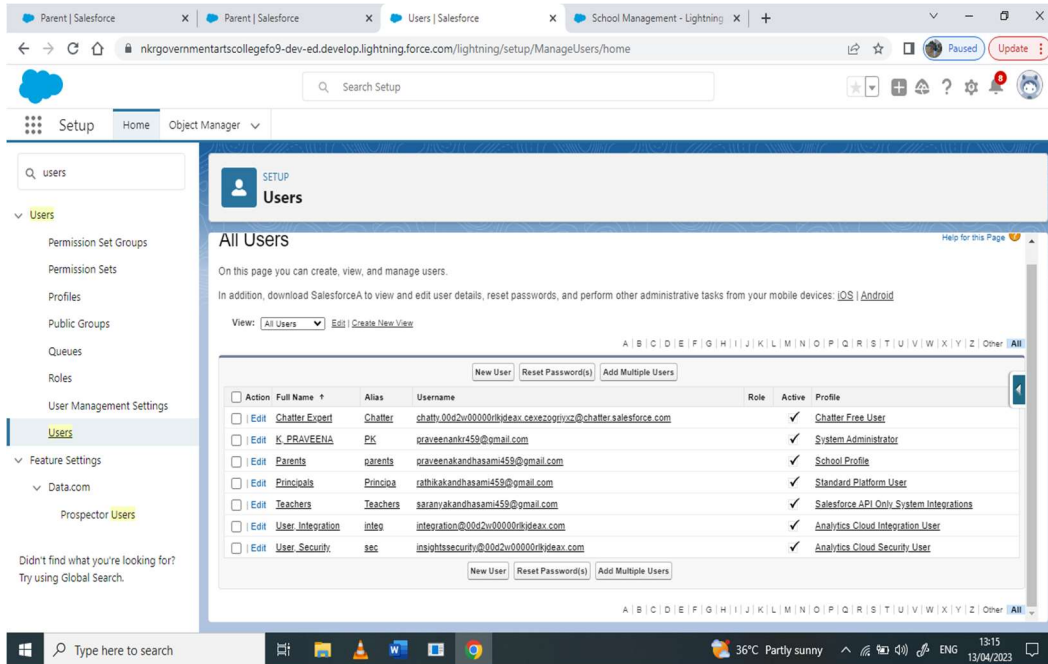
4

5

It is useful to select data types for field.



We can give permission to our profiles.



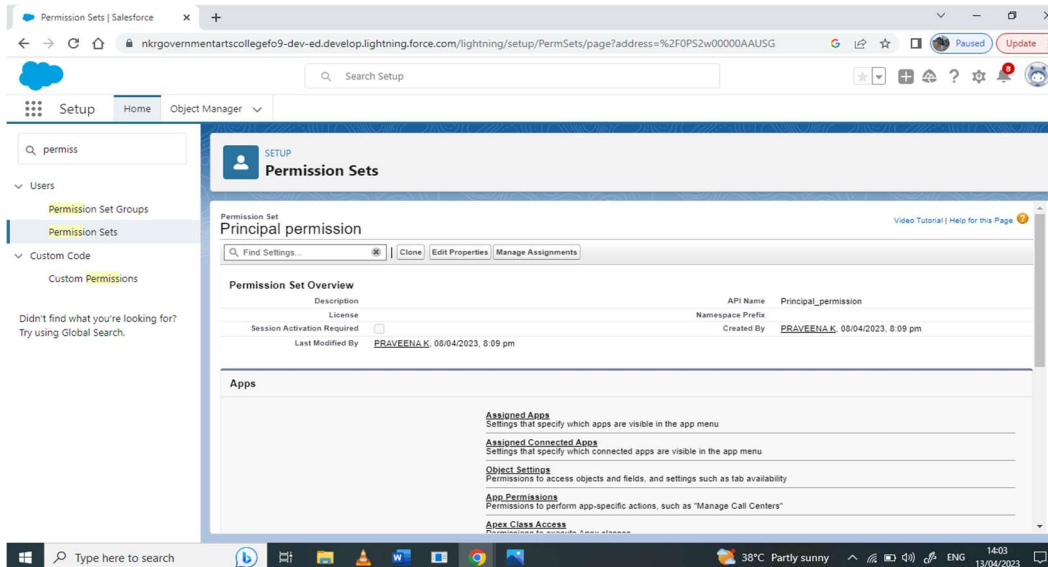
The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Users' and includes a search bar, a list of users, and a table of user details.

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 User](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Export	Chatter	chatter.000000000000@chatter.salesforce.com	Chatter Free User	✓	Chatter Free User
Edit	K. PRAVEENA	PK	praveenankr459@gmail.com	System Administrator	✓	System Administrator
Edit	Parents	parents	praveenakandhasami459@gmail.com	School Profile	✓	School Profile
Edit	Principals	Principa	praveenakandhasami459@gmail.com	Standard Platform User	✓	Standard Platform User
Edit	Teachers	Teachers	praveenakandhasami459@gmail.com	Salesforce API Only System Integrations	✓	Salesforce API Only System Integrations
Edit	User Integration	inteq	integration@0002w0000000000000@chatter.salesforce.com	Analytics Cloud Integration User	✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@0002w0000000000000@chatter.salesforce.com	Analytics Cloud Security User	✓	Analytics Cloud Security User



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Permission Sets' and includes a search bar, a list of permission sets, and a table of permission set details.

Permission Sets

Principal permission

Find Settings... | [Clone](#) | [Edit Properties](#) | [Manage Assignments](#)

Permission Set Overview

Description	API Name	Principal_permission
License	Namespace Prefix	Created By
Session Activation Required		PRAVEENA.K
Last Modified By		06/04/2023, 8:09 pm

Apps

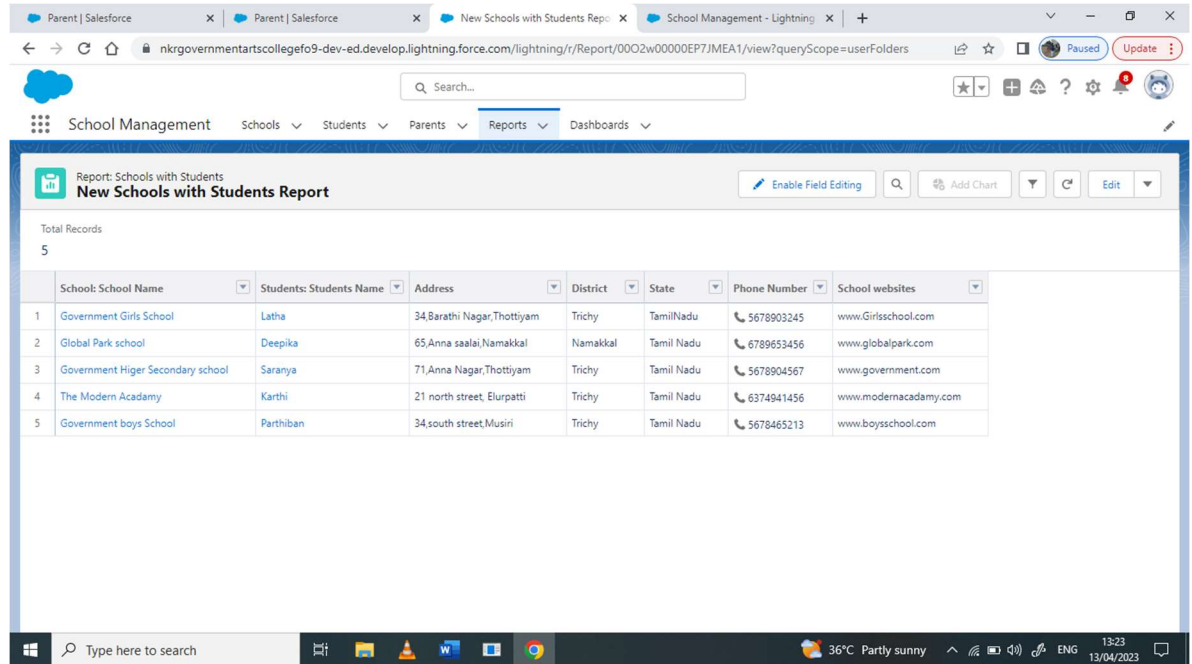
Assigned Apps
Settings that specify which apps are visible in the app menu

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"

App Class Access
Permissions to access app classes



Report: Schools with Students
New Schools with Students Report

Total Records: 5

	School: School Name	Students: Students Name	Address	District	State	Phone Number	School websites
1	Government Girls School	Latha	34 Barathi Nagar, Thottiyam	Trichy	TamilNadu	5678903245	www.Girlsschool.com
2	Global Park school	Deepika	65 Anna saalai, Namakkal	Namakkal	Tamil Nadu	6789653456	www.globalpark.com
3	Government Higer Secondary school	Saranya	71 Anna Nagar, Thottiyam	Trichy	Tamil Nadu	5678904567	www.government.com
4	The Modern Academy	Karthi	21 north street, Elurpatti	Trichy	Tamil Nadu	6374941456	www.modernacademy.com
5	Government boys School	Parthiban	34 south street, Musiri	Trichy	Tamil Nadu	5678465213	www.boysschool.com

Reports is a list of records that meet the criteria you define.

4 Trailhead Profile Public URL

Team Lead -

<https://trailblazer.me/id/upraveenak1>

Team Member 1 -

<https://trailblazer.me/id/janib13>

Team Member 2-

<https://trailblazer.me/id/kavisrim>

Team Member 3 -

<https://trailblazer.me/id/ukaviyap>

6 ADVANTAGES & DISADVANTAGE

1. Dashboards that visually showcase data
2. simplified collaboration
3. improved messaging
4. poor communication
5. lack of leadership
6. limited access to data

7 APPLICATIONS

1. A CRM is a system that helps schools manage the entire lifecycle of a potential customer
2. Tracking customer

8 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

8 FUTURE SCOPE

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging