

PROJECT REPORT TEMPLATE
A CRM APPLICATION FOR SCHOOLS AND
COLLEGE
TEAM ID : NM2023TMID18362

1.INRODUCTION

1.1 Overview :

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

1.2 Purpose :

- ❖ Personalised communication
- ❖ Improved enrolments
- ❖ Improved student enagement
- ❖ Lead management
- ❖ Automated communication
- ❖ Increased revenue
- ❖ Data-driven decision making

2. Problem Definition & Design Thinking

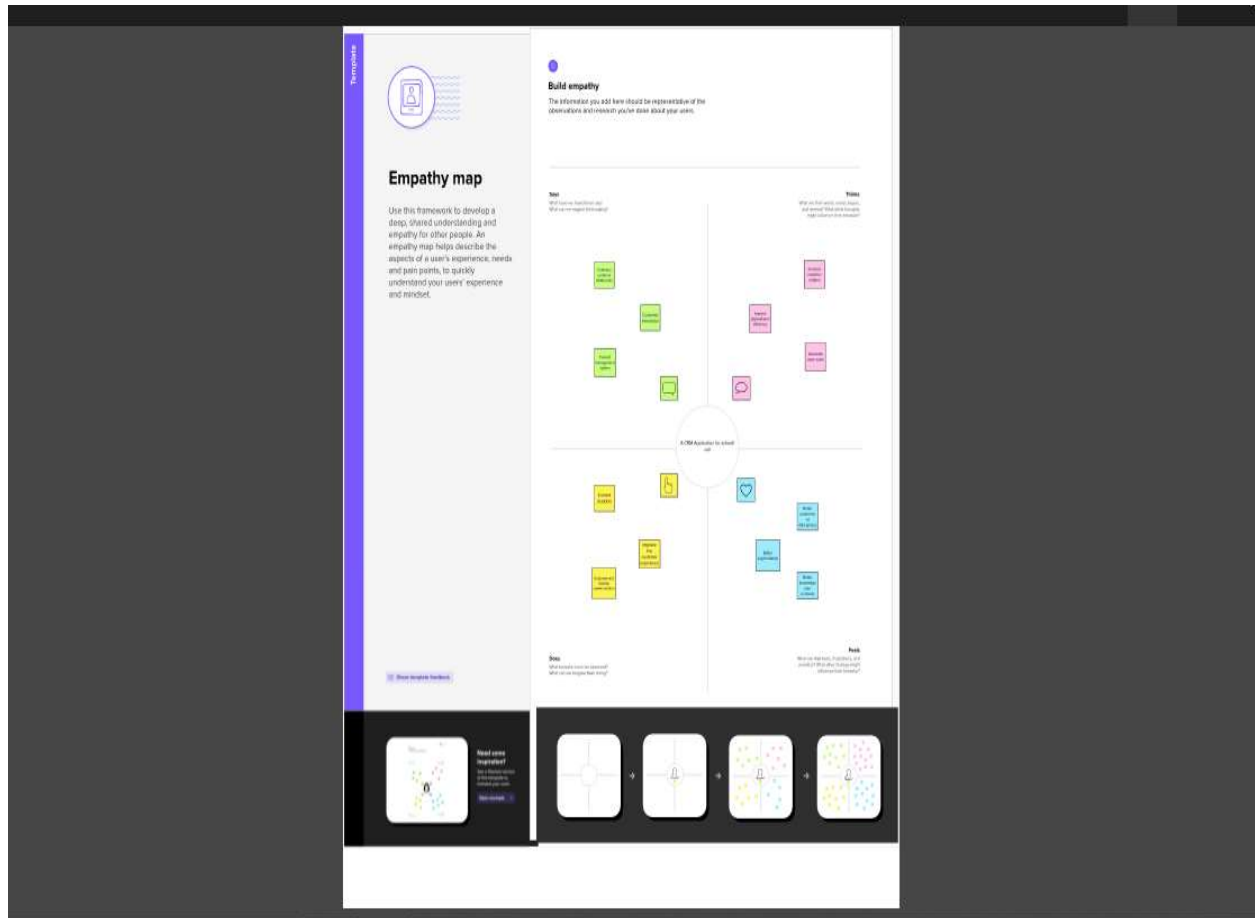
2.1 Empathy map :

An empathy map is a collaborative visualization used to articulate what we know about a particular type of user. It externalizes knowledge about users in order to

- 1) create a shared understanding of user needs, and
- 2) aid in decision making

EMPATHY MAP

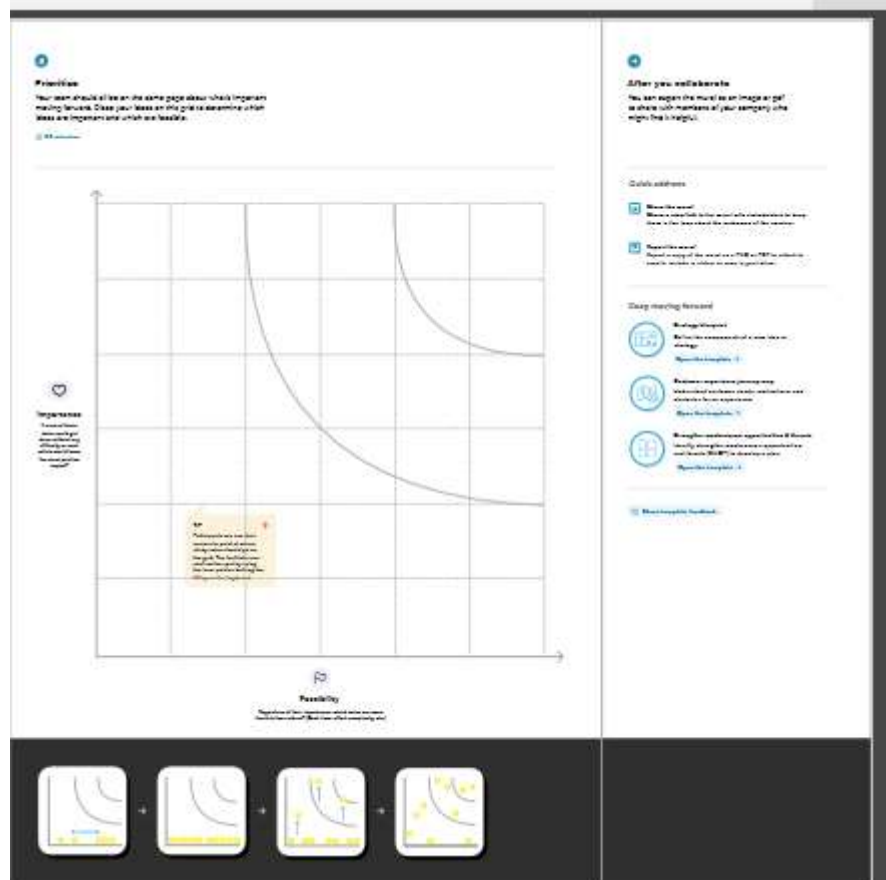
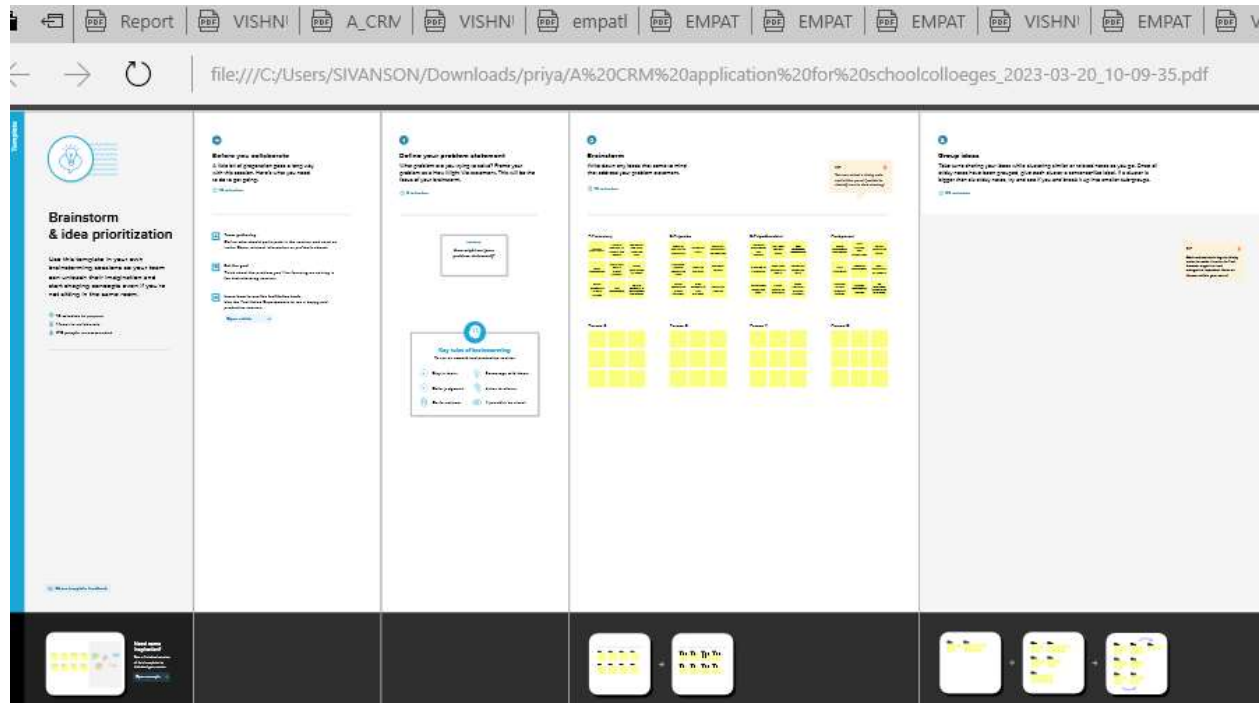
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TEAM ID	NM2023TMID18362
DATE	21.03.2023



2.2 Brainstorming :

Brainstorming is a group problem-solving method that involves the spontaneous contribution of creative ideas and solutions. This technique requires intensive, freewheeling discussion in which every member of the group is encouraged to think aloud and suggest as many ideas as possible based on their diverse knowledge.

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DATE	20.3.2023
NAME	PRAKASHRAJ.



3. RESULT

3.1 Data Model :

Object name		Field label	Data type
1	school	School	Text area
2	Student	Student	Phone
3	Parents	Parents	Text area

3.2 Activity & Screenshot :

It's Better in Lightning
Move to Lightning Experience and get more done.

Welcome to the Improved Setup!
If you're familiar with the original Setup tree, start this tour to see what's different.
If you're new to Salesforce, this tour will show you how to get to your setup tasks.

[No Thanks](#) [Show Me Later](#) [Start Tour](#)

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Generate a basic app with just one step, and then easily extend that app with clicks or code.
[Add App](#)

Salesforce Lightning
Turn on the power, speed, and simplicity of the new Salesforce user experience.
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System Overview [Expand](#)

You have a message.
[Expand](#) to see messages or go to the [system overview](#) page to see additional limits.

Recent Items [Data](#)

Name	Type	Object
students	Custom Object Definition	
parent	Custom Object Definition	
school	Custom Object Definition	
principals permission	Permission Set	
teacher permission 2	Permission Set	
teacher permission	Permission Set	
pritydharshini S	User	
school profile	Profile	
insights	Custom App	
Collaboration	Custom App	

Quick Links

Tools	Users	App
App Quick Start	New user	Manage apps
Schema Builder	Add multiple users	Manage profiles
New custom object	Reset users' passwords	Enable Chatter feeds

Security	Data
New profile	Import accounts & contacts
New permission set	Import custom objects
Add roles	Mass delete records

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Administrator

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create
- Develop
- Lightning Bolt
 - Schema Builder
 - Lightning App Builder
 - Canvas App Previewer
 - Installed Packages
 - Package Usage
 - AppExchange Marketplace

Deploy

- Deployment Settings
- Deployment Status

Monitor

- System Overview
- Optimizer
- Imports
- Outbound Messages
- Time-Based Workflow
- Automated Process Actions
- Case Escalations
- Entitlement Processes
- API Usage Notifications
- Mass Emails
- Email Snapshots
- Jobs
- Logs

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4. TRAILHEAD PROFILE PUBLIC URL

Team Leader – <https://trailblazer.me/id/prakashraj18>
Team Member 1 - <https://trailblazer.me/id/priys84>
Team Member 2 - <https://trailblazer.me/id/pushparanik111>
Team Member 3 – <https://trailblazer.me/id/priyankas123>

5. ADVANTAGES & DISADVANTAGES

Advantages :

- ❖ Improve student admission lifecycle
- ❖ Track student admission life-cycle within the institution
- ❖ Keep alumni information safe and accessible
- ❖ Stay connected with teams
- ❖ Monitor fee payments and reminders
- ❖ Reduce operational costs

Disadvantages :

- ❖ A costly project
- ❖ Loss of collected information or records
- ❖ Not suitable for every business
- ❖ It eliminates the human element
- ❖ CRM is not fully customized
- ❖ Employee training is a must
- ❖ Can be accessed by the third party

6. APPLICATIONS

- ☐ Tracking customers
- ☐ Collecting data for marketing
- ☐ Improving interactions and communications
- ☐ Streamlining internal sales processes
- ☐ Planning your operations

7. CONCLUSION

In conclusion, due many challenges that are facing human resource departments, there is need for organisations to adopt correct and workable policies that will not only ensure they alleviate these challenges but also develop mechanisms of Dellinger with such challenge in case they occur in the future .

8. FUTURE SCOPE

The project has a very vast scope in future. The project can be implemented on internet in future.