

PROJECT REPORTS

A CRM APPLICATION FOR SCHOOL/COLLEGE

1.Introduction

1.1 Overview

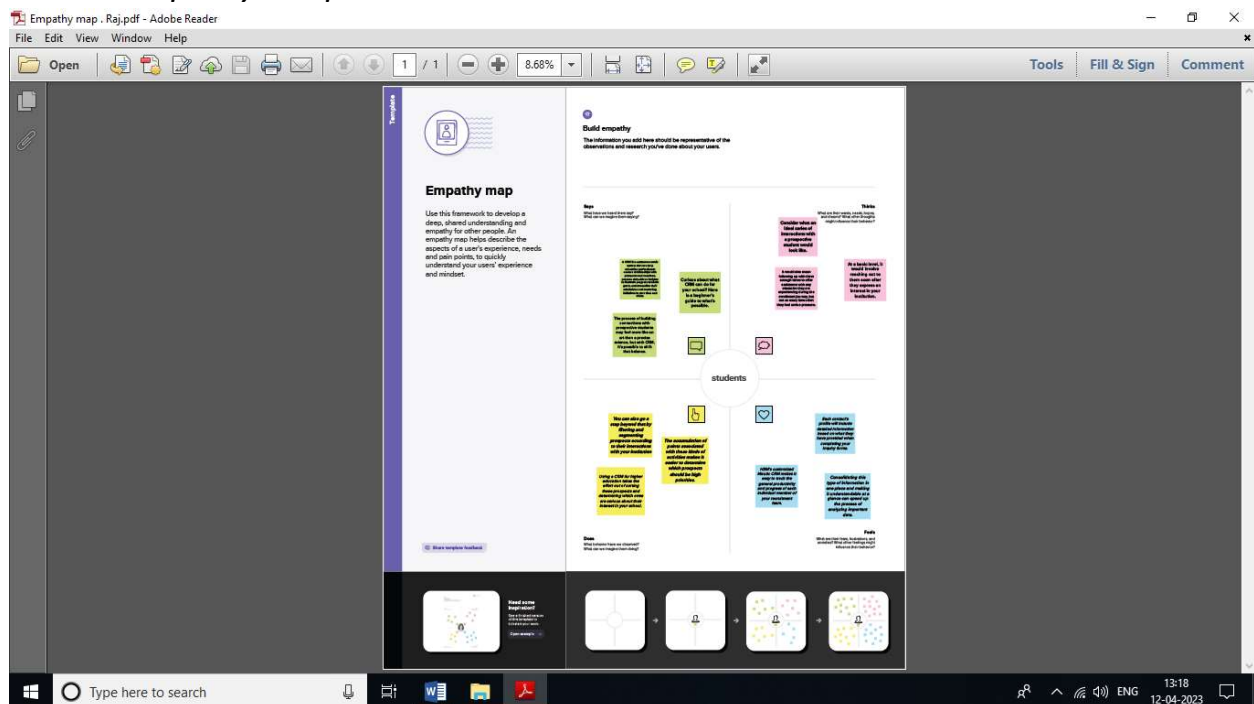
- Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

1.2 Purpose

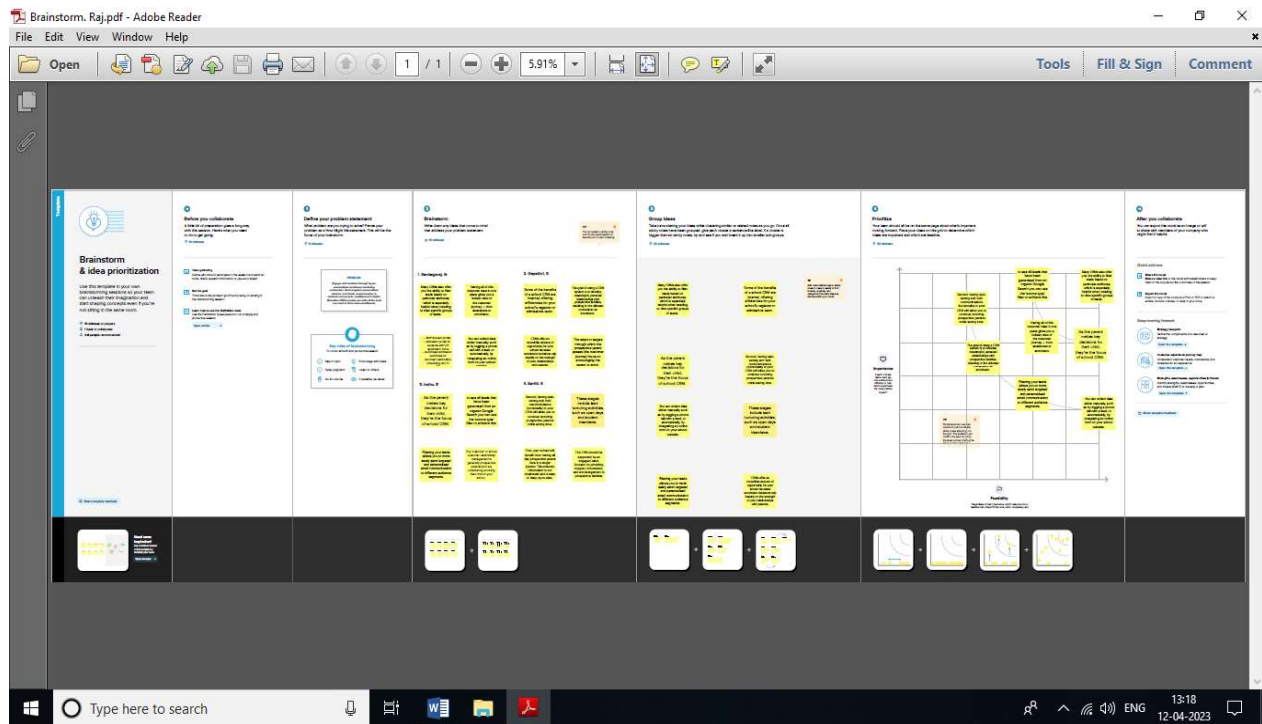
- Customer relationship management (CRM) is a technology that allows businesses both large and small to organise, automate, and synchronise every facet of customer interaction. CRM system examples include marketing, sales, customer service, and support.

2.Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3.Resultut

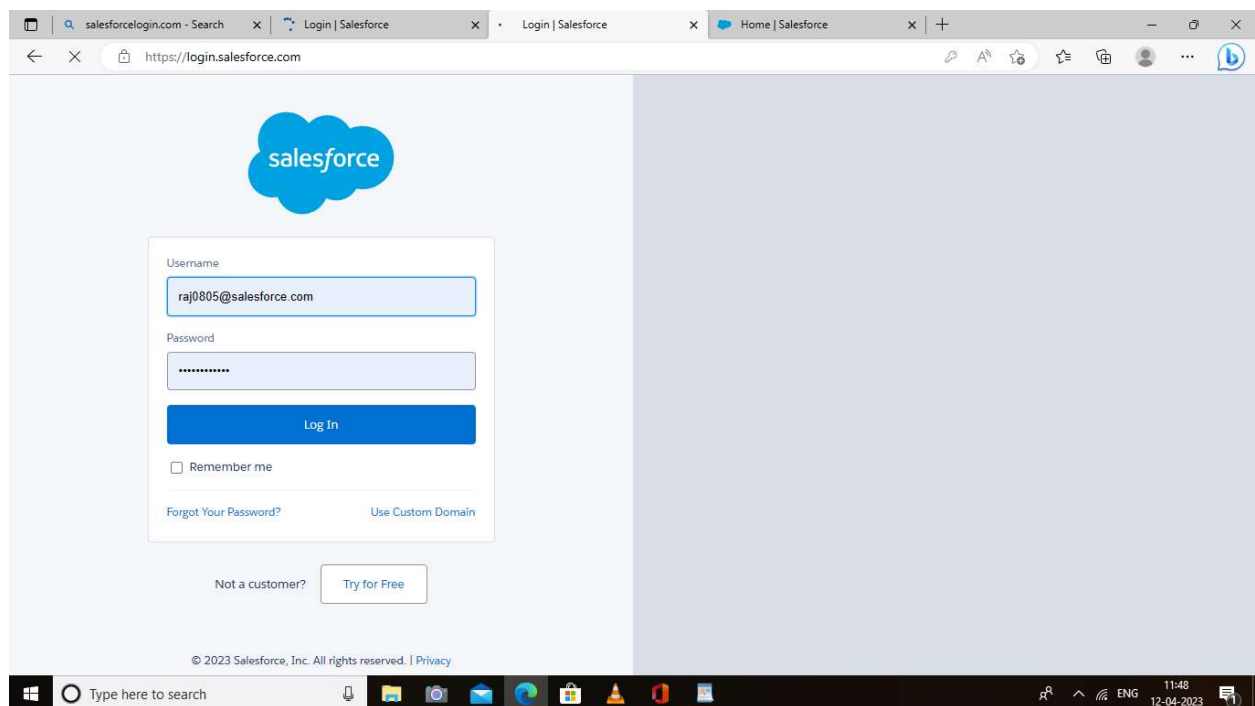
3.1 Data Model

Object Name	Fields in the Object	
School	Label	School
	Plural label	School
	Record name	School name
Student	Label	Student
	Plural label	Student
	Record name	Student name

Parent	Label	Parent
	Plural label	Parent
	Record name	Parent name

3.2 Activity & Screenshot

MILESTONE:1



MILESTONE:2

salesforcelogin.com - Search x Login | Salesforce x Object Manager | Salesforce x Home | Salesforce x +

https://governmentartsandscienc-5af-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

Object Manager
1 Items, Sorted by Label

Search: pass

Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Passport	Passport__c	Custom Object		08/04/2023	✓

Type here to search

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https://governmentartsandscienc-5af-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

Search: app

Salesforce Mobile App

- Data
 - Mass Transfer Approval Requests
- Apps
 - App Manager**
 - AppExchange Marketplace
 - Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - Lightning Bolt
 - Flow Category
 - Lightning Bolt Solutions
 - Mobile Apps

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☒ Enabled

23 items • Sorted by App Name • Filtered by All appmenuitems • TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
1	All Tabs	AllTabSet		08/04/2023, 6:10 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	08/04/2023, 6:10 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	08/04/2023, 6:10 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions ...	08/04/2023, 6:13 am	Lightning	✓

Type here to search

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MILESTONE:4

salesforce.com - Search | Login | Salesforce | Passport | Salesforce | Home | Salesforce

https://governmentartsandscienc-Saf-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000002PYe/FieldsAndRel...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Passport

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

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
Contact number	Contact_number_c	Number(13, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Passport Name	Name	Auto Number		✓
Passport Number	Name_c	Text(80)		
Passport Number	Passport_Number_c	Master-Detail(Account)		✓

Type here to search

ENG 11:52 12-04-2023

MILESTONE:5

salesforce.com - Search | Login | Salesforce | Profiles | Salesforce | Home | Salesforce

https://governmentartsandscienc-Saf-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

SETUP

Profiles

prof

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

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

1-25 of 39 0 Selected

Page 1 of 2

Type here to search

ENG 11:53 12-04-2023

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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](#)

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5i00000by4kdeal.cevsmzdsckv@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Manager_Hr	hmana	senbagaraiu777@gmail.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	S_Senbagarai	SS	rai0805@salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5i00000by4kdeal.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5i00000by4kdeal.com		✓	Analytics Cloud Security User

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

MILESTONE:7

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](#) | [Download](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see product...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access t...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service ...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that ...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice cont...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Unif...	Service Cloud Unif User

1-25 of 25 | 0 Selected | [Previous](#) | [Next](#) | Page 1 of 1

MILESTONE:8

Report: Contacts & Accounts
New Contacts & Accounts Report

Enable Field Editing | Add Chart | Edit

Number of Locations	Account ID	0015i00000e1nBQ	0015i00000e1nBR	0015i00000e1nBS	0015i00000e1nBT	0015i00000e1nBU	0015i00000e1nBV	0015i00000e1nBW	0015i00000e1nBX	0015i00000e1nBC
3	Record Count	0	0	0	0	0	0	0	0	1
6	Record Count	0	1	0	0	0	0	0	0	0
17	Record Count	0	0	1	0	0	0	0	0	0
34	Record Count	0	0	0	0	0	0	0	0	0
57	Record Count	0	0	0	0	2	0	0	0	0

Details (20 Rows) | Click an intersection in the table above to filter details.

	Salutation	First Name	Last Name	Title	Account Name	Mailing Street
3	Ms.	Edna	Frank	VP, Technology	GenePoint	345 Shoreline Park Mountain View, CA 94043 USA
4	Ms.	Rose	Gonzalez	SVP, Procurement	Edge Communications	313 Constitution Place Austin, TX 78767 USA

Row Counts | Detail Rows | Grand Total | Stacked Summaries

4.Trailhead Profile Public URL

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

Team member 1-<https://trailblazer.me/id/gayus30>

Team member 2-<https://trailblazer.me/id/indhu3>

5.ADVANTAGES &DISADVANTAGES

5.1 ADVANTAGES

- It allows for the consolidation of customer data and the basis for deep insights.
- It speeds up the sales conversion process.
- It increases staff productivity, lowering time-cost.
- It allows geographically dispersed teams to collaborate effectively.
- Improves customer experience by allowing personalisation and improved query resolution.

5.2 DISADVANTAGES

- Customer experience may worsen due to staff over-reliance on the system.
- Security and data protection issues with centralised data.
- The excess initial time and productivity cost at the implementation.
- Requires a process-driven sales organisation.
- CRM may not suit all businesses.

6.APPLICATION

- CRM can analyze data and generate reports whenever required. There are mainly three types of CRM applications – Operational, Analytical and Collaborative to perform all these activities.

7.CONCLUSION

- CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases. By implementing a CRM into your retail sales process, you can enhance customer relationships by providing personalized service that caters to their individual needs.

8.FUTURE SCORE

- CRM software can make your life easier by [automating your workflow](#). Look for software that lets you set up custom rules and comes with sales force automation to help you and your team be more productive.
- By using rules, you can set your CRM software to automatically perform a specific action based on triggers or events, such as these:
- When a potential customer fills out a contact form on your website, the CRM software automatically directs the message to the right sales representative or department.
- When a sales representative receives a message, the CRM software automatically sends a preset response to acknowledge the message.
- If a lead, prospect, or opportunity doesn't respond to your message or proposal, the CRM software automatically sends a follow-up message after a preset amount of time, such as 48 hours or two business days.
- When a sales representative makes calls or sends messages to a contact, the CRM software automatically logs hours and keeps track of all communications.
- As sales representatives complete tasks, the CRM software automatically reports them to supervisors and upper management for performance reports.

