

## 1 INTRODUCTION

### Overview

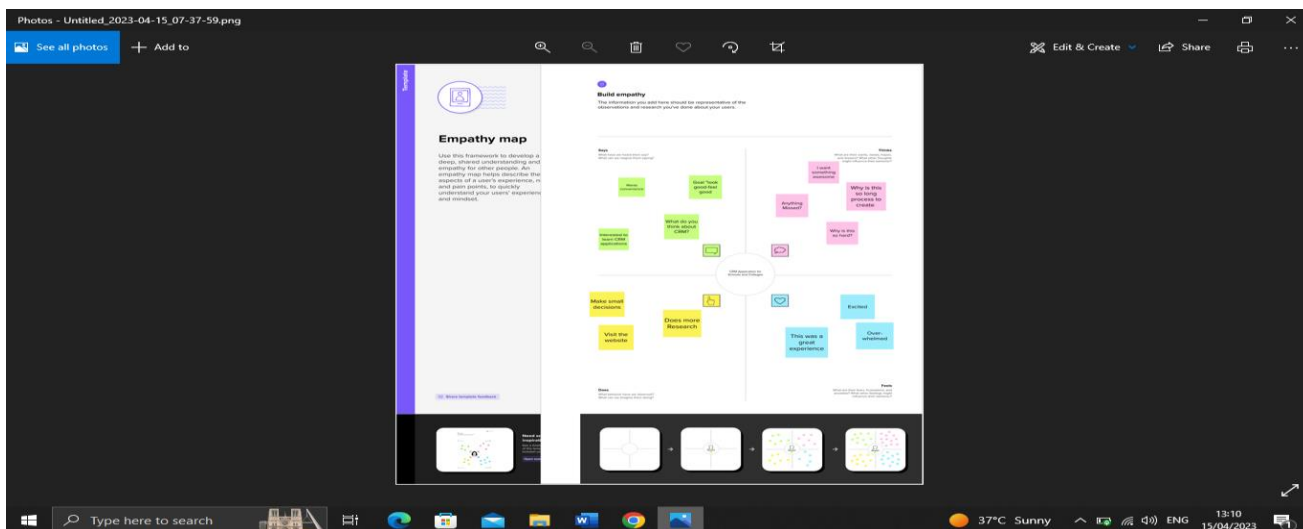
Customer relationship management or CRM software enables educational institutions such as schools , colleges and universities to manage relationships with students , parents , staff , alumni , and other stakeholders. It handles all aspects of the entire student lifecycle , from enrollment , and academic progress tracking to fundraising management and reporting tools.

### Purpose

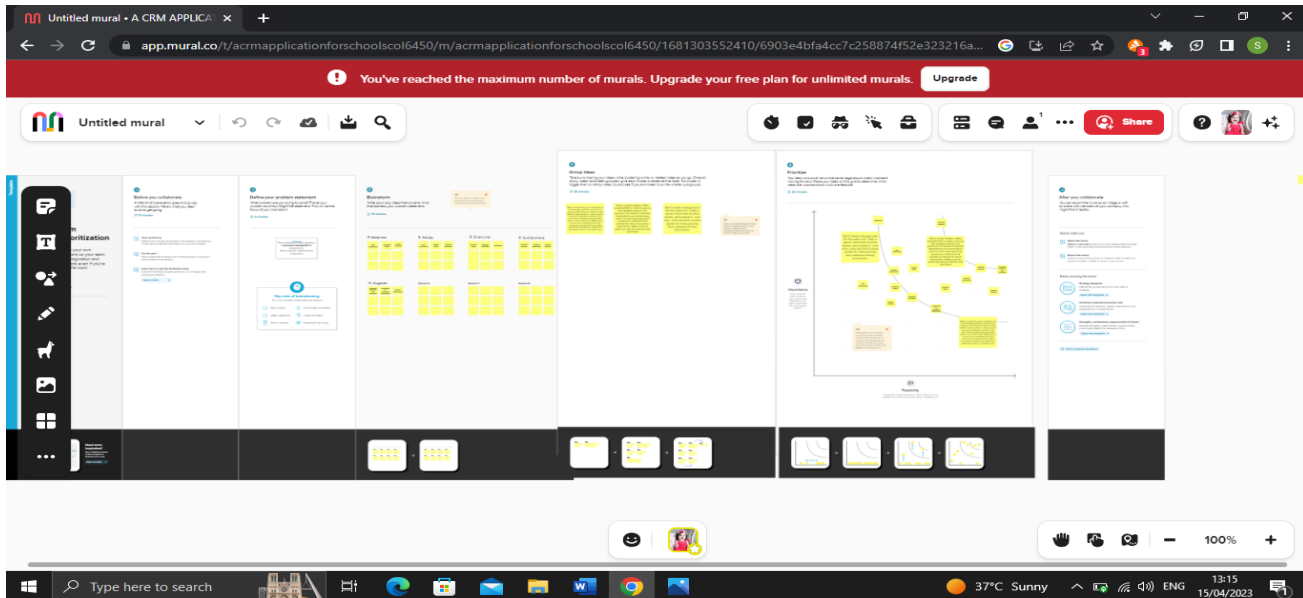
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: **Improve business relationships**. A CRM system helps companies stay connected to customers , streamline processes , and improve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

## 2 Problem Definition & Design Thinking

### Empathy map



# Ideation & Brainstorming Map



## 3 RESULT

### Data Model:

Object Name	Fields In The Object	
Obj1    Schools	<b>Field label</b>	<b>Data type</b>
	Address	Text Area
	No Of Students	Role up summary
	Highest Mark	Role up summary
Obj2    Students	<b>Field label</b>	<b>Data type</b>
	Results	Pick list
	Class	Number
	Marks	Number
Obj3    Parents	<b>Field label</b>	<b>Data type</b>
	Parent Address	Text Area
	Parent Number	Phone

### Activity & Screenshot

Setup | Salesforce | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Setup | Home | Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Didn't find what you're looking for? Try using Global Search.

### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

#### Custom Object Tabs

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Parents	Books	
<a href="#">Edit</a>   <a href="#">Del</a>	Schools	Triangle	
<a href="#">Edit</a>   <a href="#">Del</a>	Students	Trophy	

#### Web Tabs

No Web Tabs have been defined

#### Visualforce Tabs

No Visualforce Tabs have been defined

#### Lightning Component Tabs

No Lightning component tabs have been defined

#### Lightning Page Tabs

No Lightning Page tabs have been defined

https://governmentartscollegekarur3-dev-ed.develop.lightning.force.com/one/one.app#/setup/CustomTabs/home

School | Salesforce | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000372oA/Details/view

Setup | Home | Object Manager

Search Setup

### School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

#### Details

Description	
API Name	SCHOOL__C
Custom	✓
Singular Label	School
Plural Label	Schools
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

students | Salesforce | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000372zw/Details/view

Setup | Home | Object Manager

Search Setup

### students

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

#### Details

Description	
API Name	student__c
Custom	✓
Singular Label	students
Plural Label	Students
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

https://governmentartscollegekarur3-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w00000372zw/FieldsAndRelationships/view

Parent | Salesforce x Profile | Trailblazer.me x +

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000372tG/Details/view

Setup Home Object Manager

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name: Parent\_\_c

Custom

Singular Label: Parent

Plural Label: Parents

Enable Reports: ☒

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Type here to search

Air: Moderate 11:25 15/04/2023

Tabs | Salesforce x Profile | Trailblazer.me x +

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w000000f9Gn%3Fsetupid%3...

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Custom Object Tab: Schools

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Schools	Tab Style	Triangle
Object	School	Splash Page Custom Link	
Description			
Created By	Sanjay S. 20/03/2023, 10:55 am	Modified By	Sanjay S. 20/03/2023, 10:55 am

Edit Delete

Type here to search

34°C Haze 11:30 15/04/2023

Tabs | Salesforce x Profile | Trailblazer.me x +

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w000000f9HH%3Fsetupid%3...

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Custom Object Tab: Students

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Students	Tab Style	Triangle
Object	Students	Splash Page Custom Link	
Description			
Created By	Sanjay S. 20/03/2023, 10:55 am	Modified By	Sanjay S. 20/03/2023, 10:55 am

Edit Delete

https://governmentartscollegekarur3-dev-ed.develop.my.salesforce.com/one/a...

Type here to search

34°C Haze 11:30 15/04/2023

Setup | Salesforce | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F012w000000F9Hg%3Fsetupid%3...

Setup

Search Setup

Setup Tabs

Custom Object Tab Parents

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Parents	Tab Style	Books
Object	Parent	Splash Page Custom Link	
Description			
Created By	Sadi@US, 29/03/2023, 11:03 am	Modified By	Sadi@US, 29/03/2023, 11:03 am

Type here to search

34°C Haze 11:29 15/04/2023

Recently Viewed | Schools | Sales | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/o/School\_\_c/list?filterName=Recent

School Management

Schools

Recently Viewed

0 items • Updated a few seconds ago

Search this list...

School Name

You haven't viewed any Schools recently.  
Try switching list views.

Type here to search

34°C Haze 11:32 15/04/2023

Recently Viewed | Students | Sales | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/o/student\_\_c/list?filterName=Recent

School Management

Students

Recently Viewed

0 items • Updated a few seconds ago

Search this list...

student Name

You haven't viewed any Students recently.  
Try switching list views.

Type here to search

34°C Haze 11:33 15/04/2023

Recently Viewed | Parents | Salesforce | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/o/Parent\_\_c/list?filterName=Recent

School Management Schools Students Parents Reports Dashboards

Parents Recently Viewed

0 Items • Updated a few seconds ago

Search this list...

Parent Name

You haven't viewed any Parents recently.  
Try switching list views.

Type here to search

34°C Haze 11:34 15/04/2023

Reports | Salesforce | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

School Management Schools Students Parents Reports Dashboards

Reports Recent

1 Item

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Students with Schools Report	School with students and parents	Private Reports	Sanjay R	29/3/2023, 9:10 pm	

Created by Me  
Private Reports  
Public Reports  
All Reports

FOLDERS  
All Folders  
Created by Me  
Shared with Me

FAVORITES  
All Favorites

Type here to search

34°C Haze 11:34 15/04/2023

New Students with Schools Report | Profile | Trailblazer.me

governmentartscollegekarur3-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000DoVW0EA3/view?queryScope=userFolders

School Management Schools Students Parents Reports Dashboards

Report: Students with Schools  
New Students with Schools Report  
School with students and parents

Enable Field Setting Add Chart Edit

Total Records: 0 Total Marks: 0

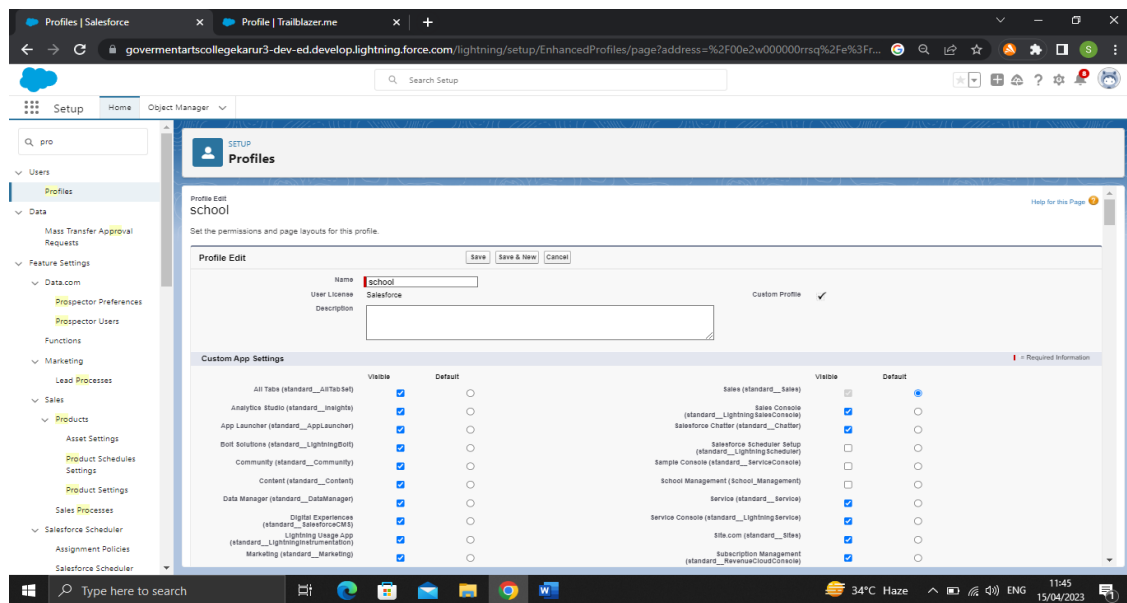
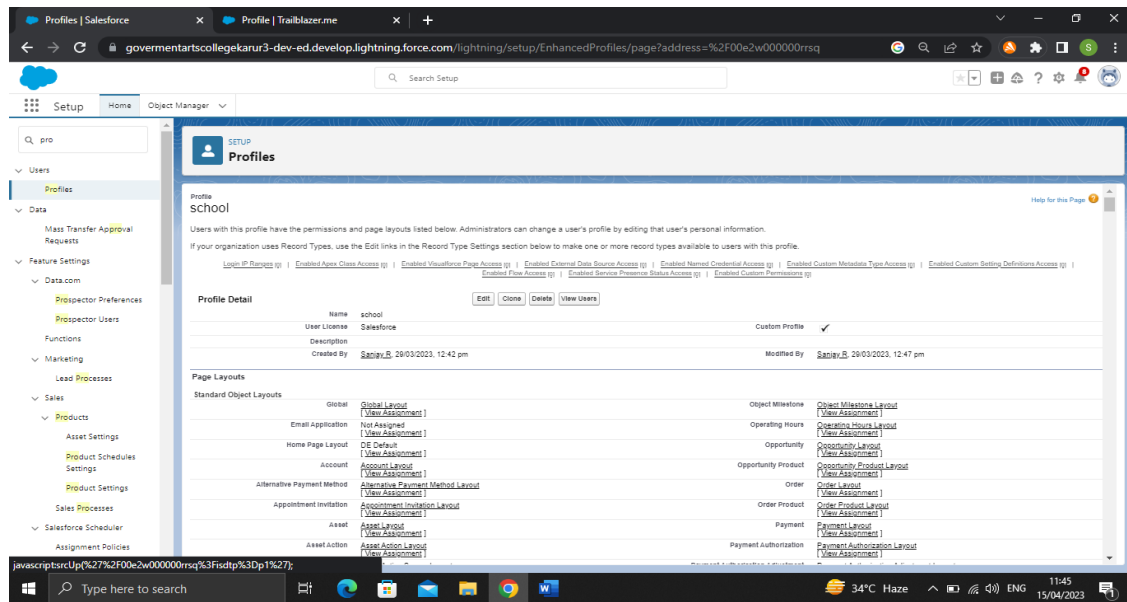
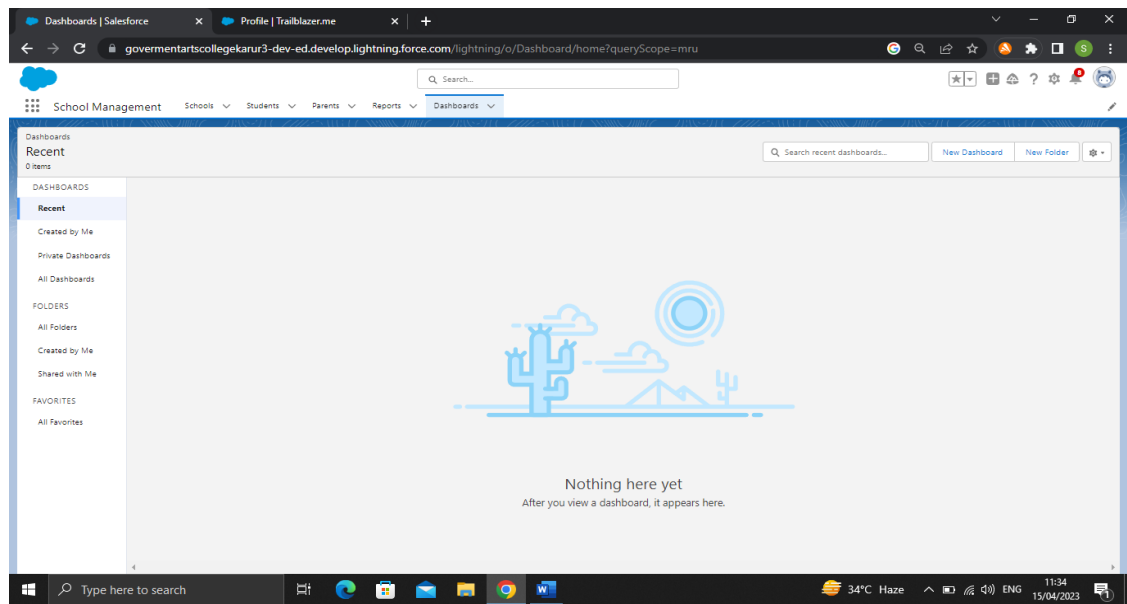
No Results

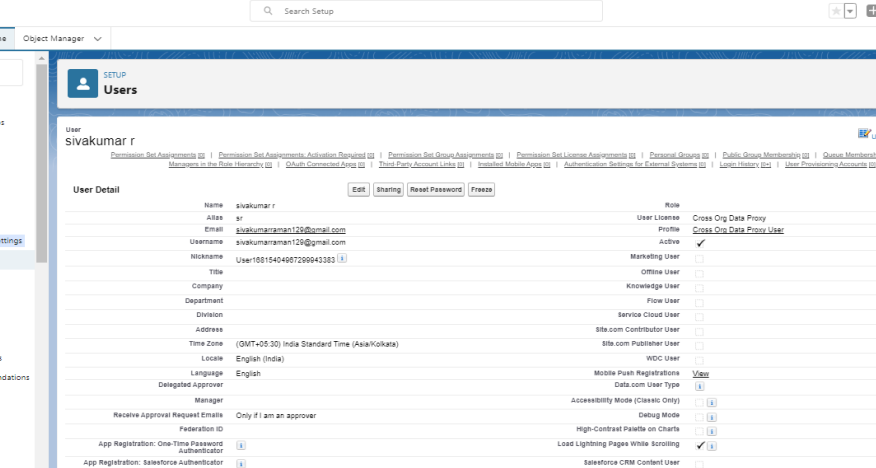
No records returned. Try editing report filters.

Row Counts Detail Rows Subtotals Grand Total

Type here to search

35°C Haze 12:24 15/04/2023



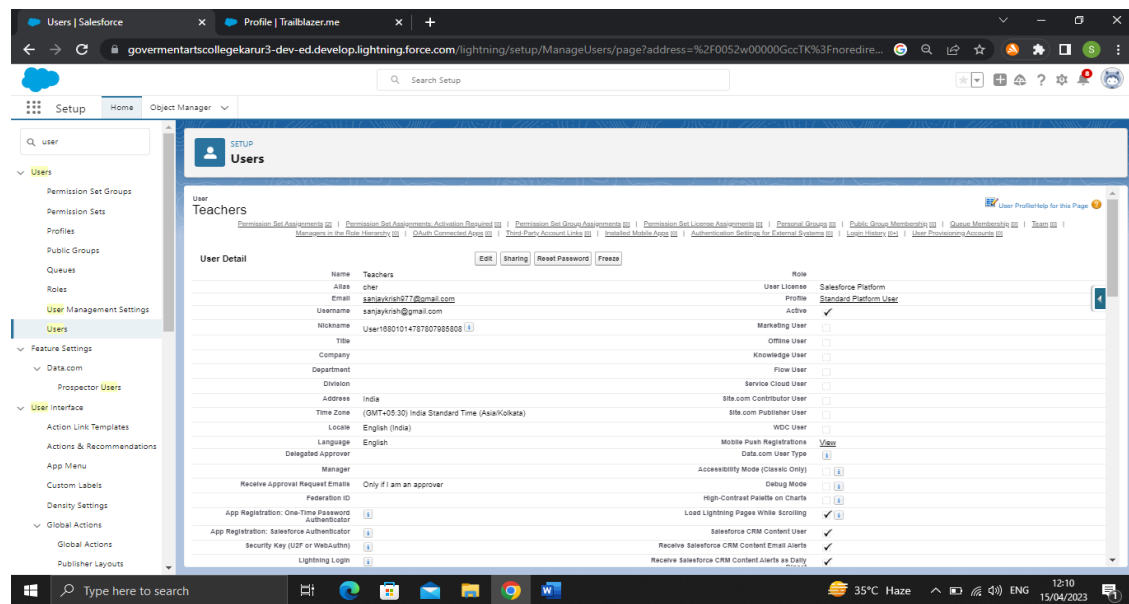


The screenshot shows the Salesforce Lightning Setup page for the 'Users' section. The left sidebar contains navigation links for 'Setup', 'Home', 'Object Manager', and 'Users'. The 'Users' section is active, showing a list of users. The user 'sivakumar r' is selected, and the 'User Detail' section is expanded. The 'User Detail' section displays the user's profile information, including Name, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Language, Delegated Approver, Manager, Request Emails, Federation ID, App Registration, and Lightning Login. The 'Role' section shows the user's role as 'Marketing User' and the 'Cross Org Data Privacy' settings.

User Detail		Role	
Name	sivakumar r	Role	Marketing User
Alias	sr	User License	Cross Org Data Privacy
Email	sivakumaraman120@gmail.com	Profile	Cross Org Data Privacy User
Username	sivakumaraman120@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User10815404987209043383	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Org)	<input type="checkbox"/>
Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Salesforce CRM Content User	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	<input type="checkbox"/>	Receive Salesforce CRM Content Email Alerts	<input type="checkbox"/>
Lightning Login	<input type="checkbox"/>	Receive Salesforce CRM Content Alerts as Daily	<input type="checkbox"/>

[illegible]





**Team Leader** - <https://trailblazer.me/id/psa75>

**Team Member 2 - <https://trailblazer.me/id/sir77>**

**Team Member 4 - <http://trailblazer.me/id/suugr>**

# Project Report Template

## **ADVANTAGES**

1. Beneficial for different department or teams of the business
2. Customers are engaged across multiple channel
3. Provide streamline operations
4. Improve customer service
5. Data Mining
6. Helps in increasing sales
7. CRM made targeting and marketing simple
8. Improve decision making and productivity
9. CRM growing scope in the market
10. Centralized data makes everything Convenient
11. Tracking of customer data

## **DISADVANTAGES**

1. A costly project
2. Loss of collected information records or
3. Not suitable for every business
4. It eliminates the human element
5. Can be accessed by third party
6. CRM is not fully customized
7. Have poor usability
8. Employee training is must
9. Having lots of security concerns
10. Centralized data is at stake
11. Experience based procedure in all the stages

## **APPLICATIONS**

1. Tracking customers
2. Collecting Data for Marketing
3. Improving Interactions and communications
4. Streamlining Internal Sales Processes
5. Planning Your Operations.

## **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 ensures long-term customer loyalty

## **FUTURE SCOPE**

“[The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends – driven by customer expectations.