

1 INTRODUCTION

1.1 Overview

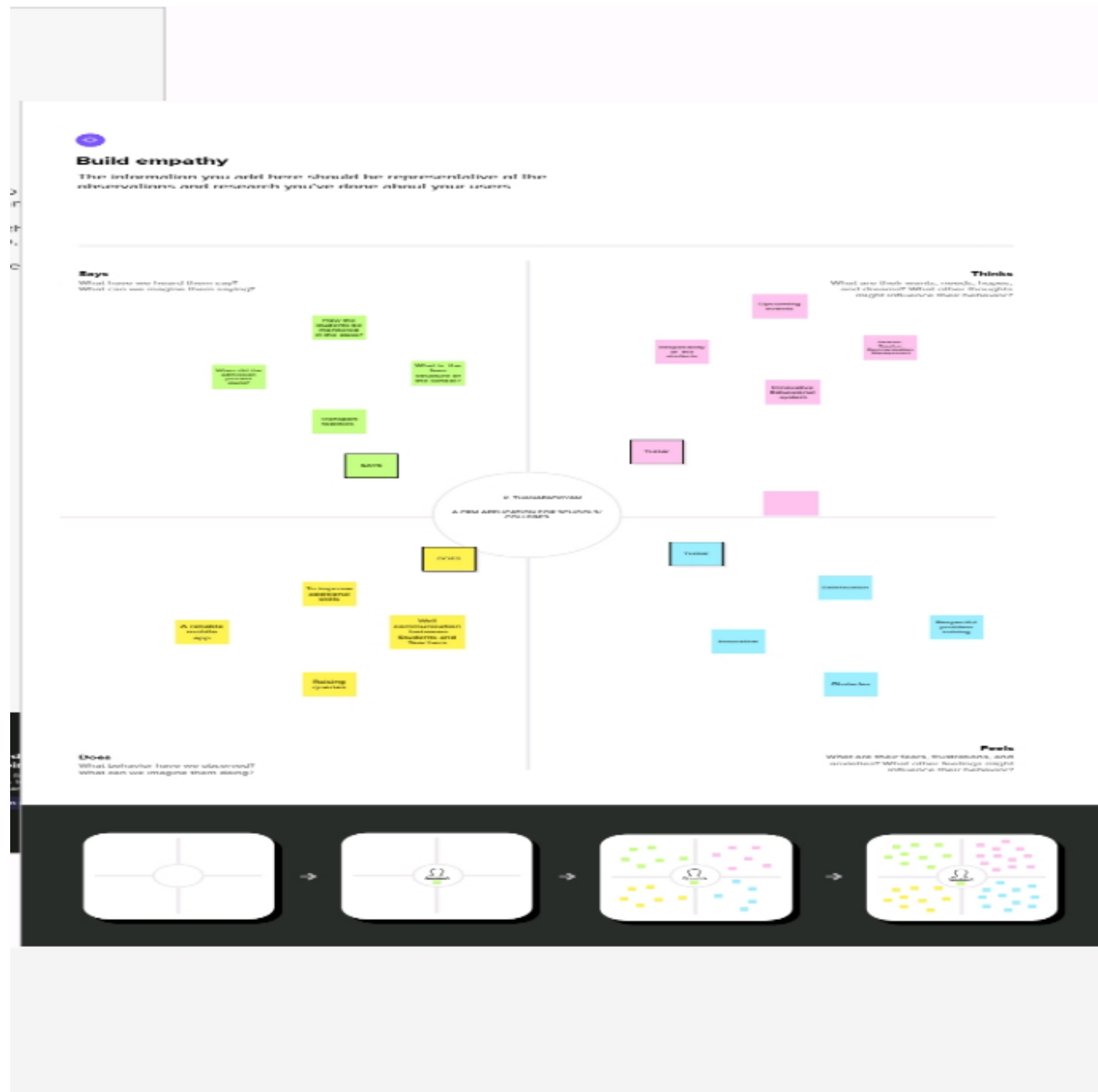
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain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

1.2 Purpose

Broadly, the purpose of CRM systems is to streamline, integrate and automate customer-facing processes and data. They save your employees time and help to reduce human error in customer management. That means you can deliver high quality and consistent customer service.

2 ProblemDefinition& DesignThinking

2.1 EmpathyMap



2.2 Ideation&BrainstormingMap



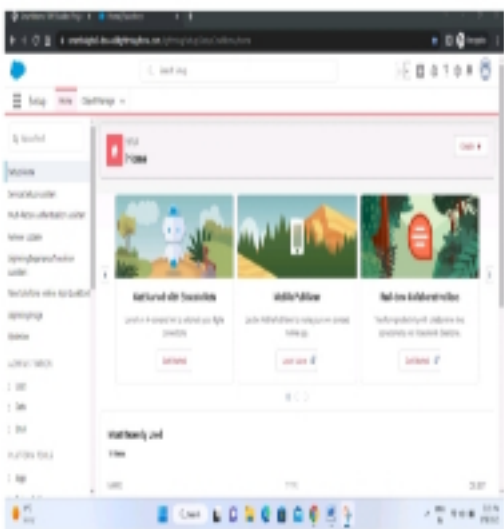
3 RESULT

3.1 DataModel:

Objectname	FieldsintheObject	
obj1 School	Fieldlabel	Data type
	Enter Address	Text Area
	Phone Number	Phone
obj2 Student	Fieldlabel	Data type
	Phone Number	Phone
	Enter school	Master Detail Relationship

3.2 ACTIVITY AND SCREEN SHOT:

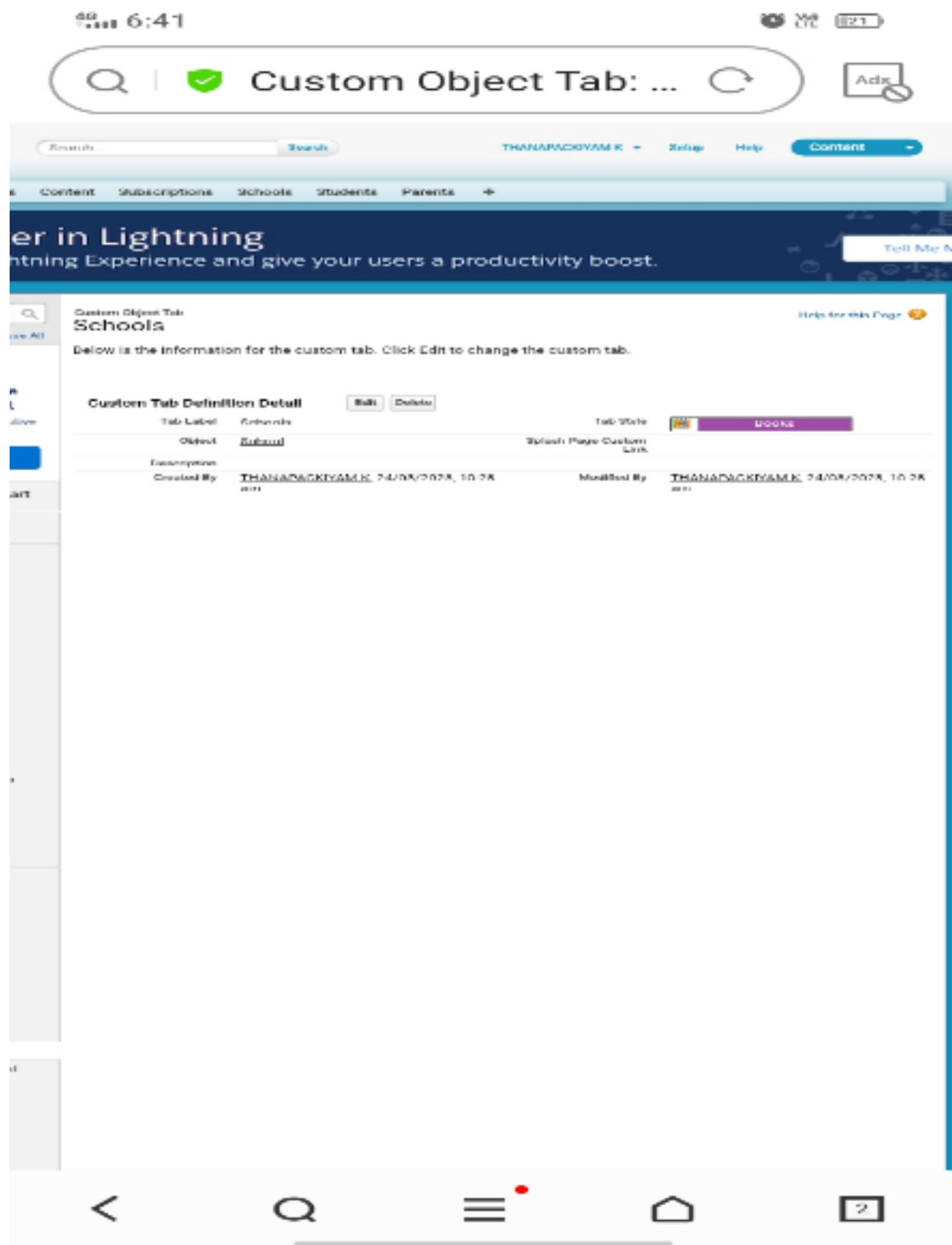
we create developer org in Salesforce and give user name and password to login after login is the home page which you will see.



Milestone:2

Activity-1Creation of school object

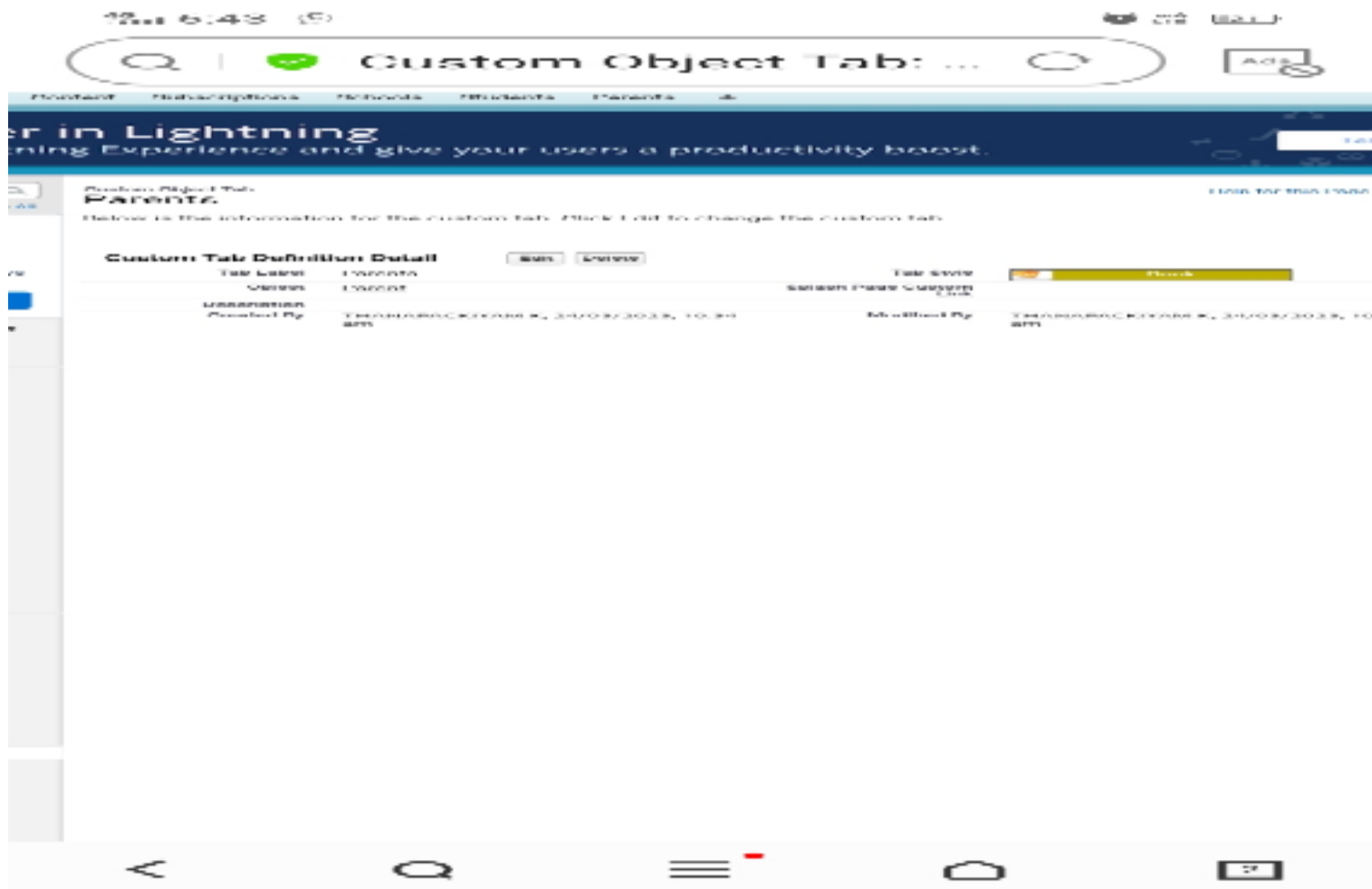
Navigate to setup and select object manager and label name school and datatype check box and saveit



Create Student object



Create parent object



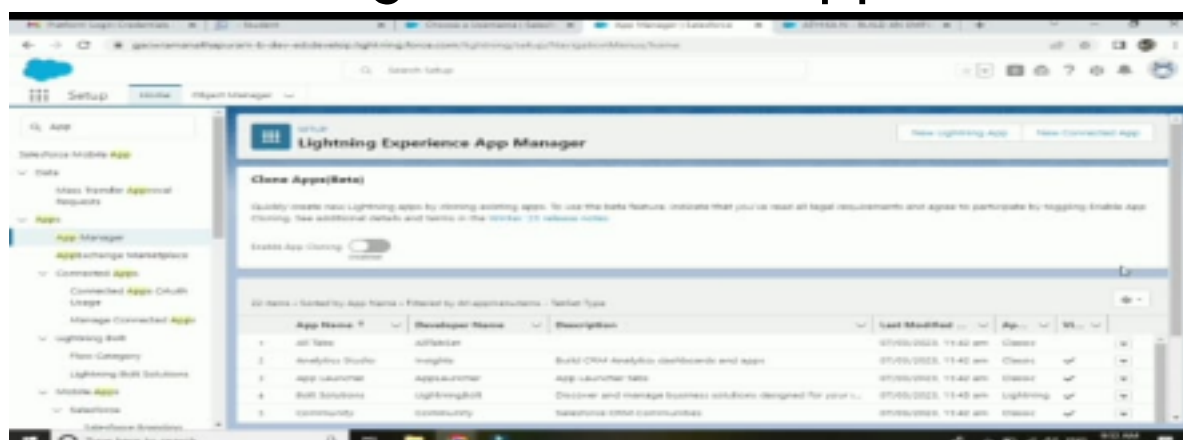
Milestone 3:

Lightningapp

Create the school management app go to setup

enter appmanager click new lightningapp enter

school management as the app name click next



Milestone:4

Field and Relationship

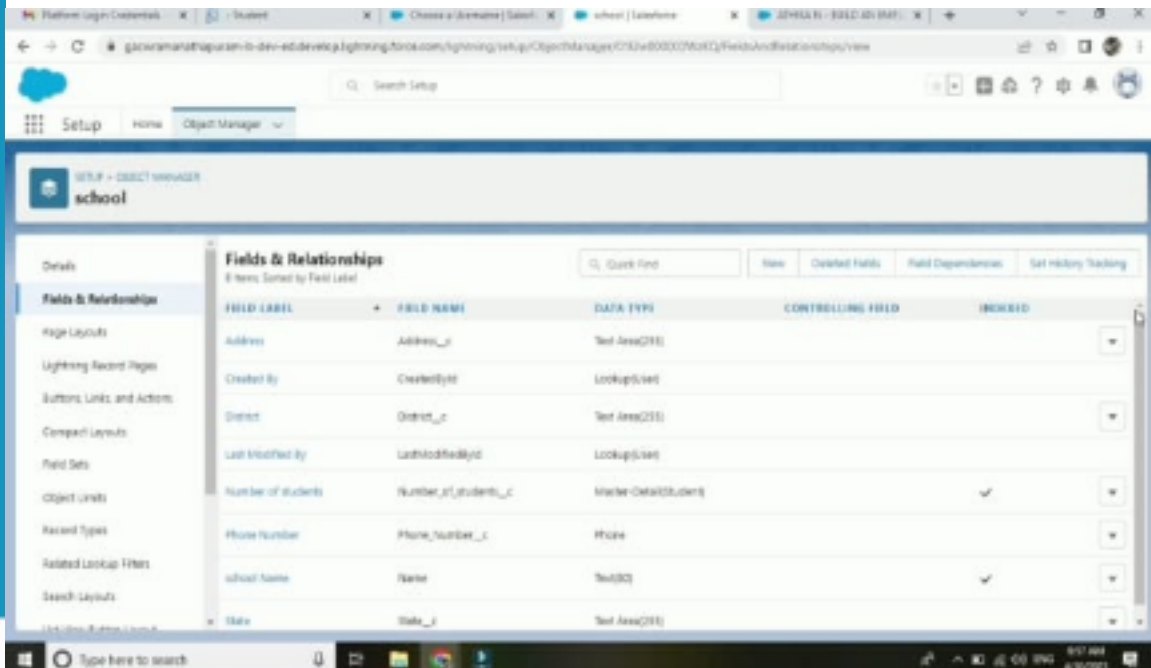
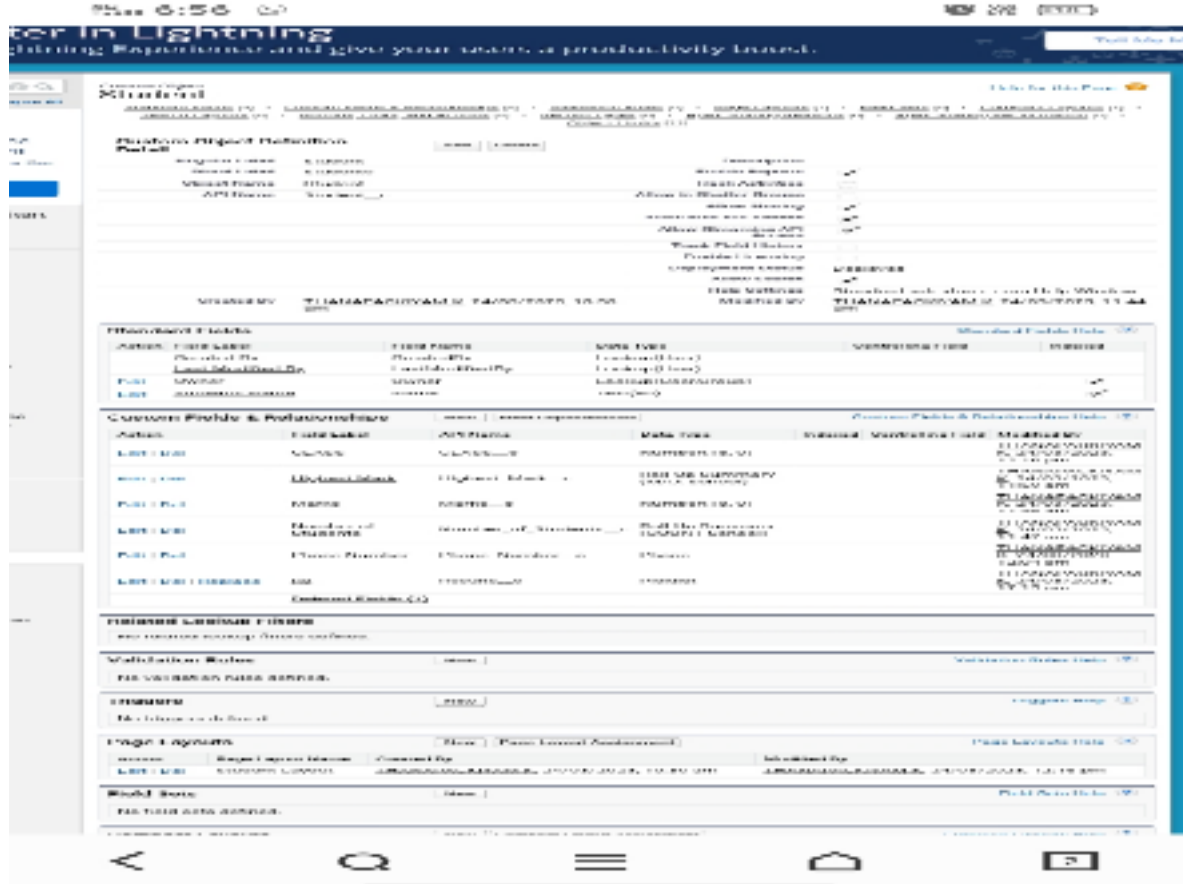
Select the textarea as the date type then click next.For

field label enter address click the then save

Select the master object summarized as students and

select Marks as field to aggregate click next and save





Milestone:5

Creation of profile

From setup entre profile in the quick findbox,and

select profile from the list of profile find

standard user click sclone for profile name enter

school profile saveit

Milestone:6

Users

From setup inthe quick findbox enter users

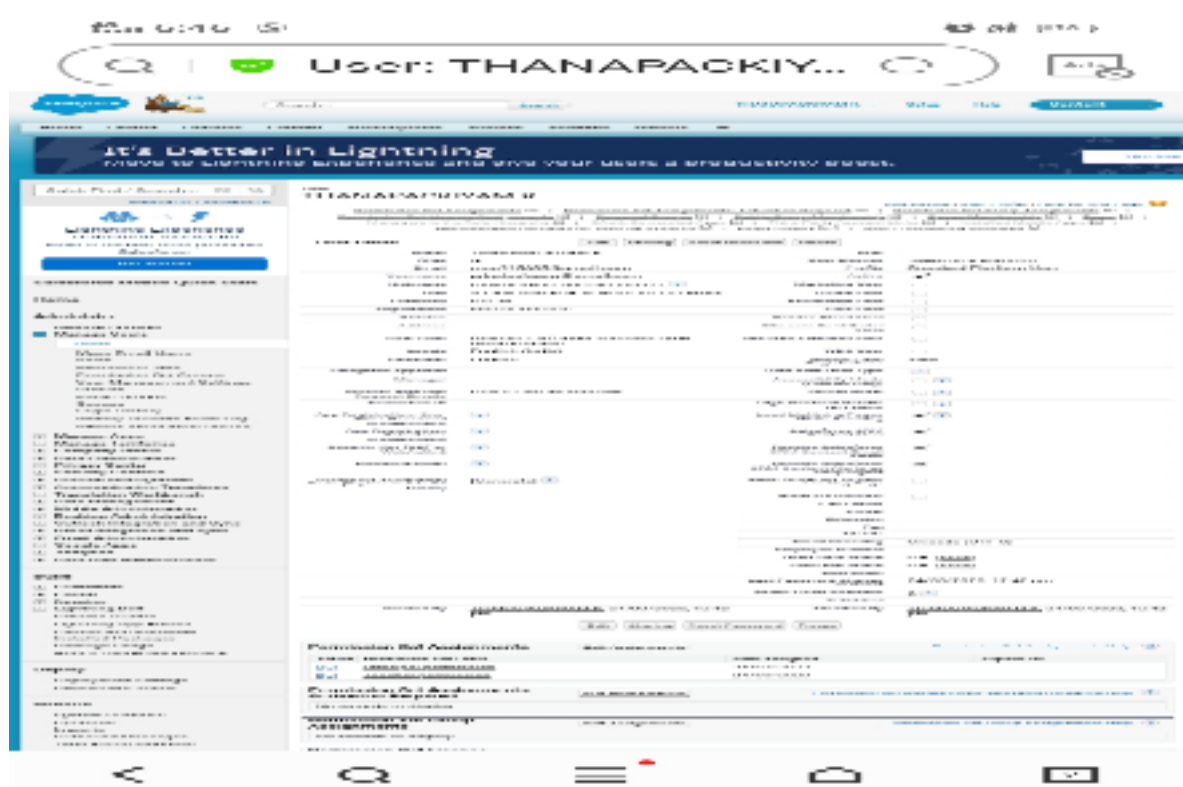
and then select user senter the username

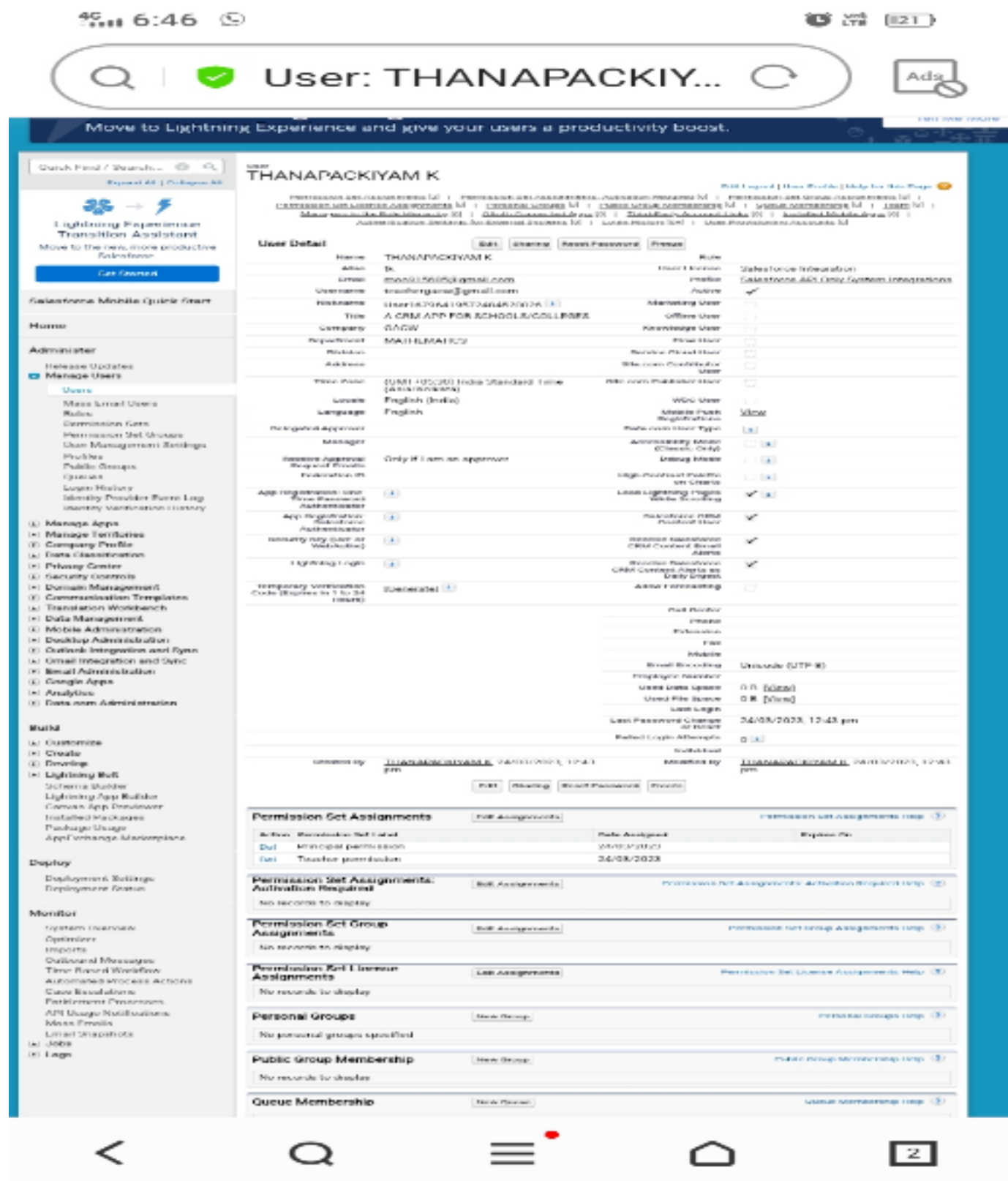
parent and student email address and unique

username check generated new password and

notify the users immediately to havebthe user log

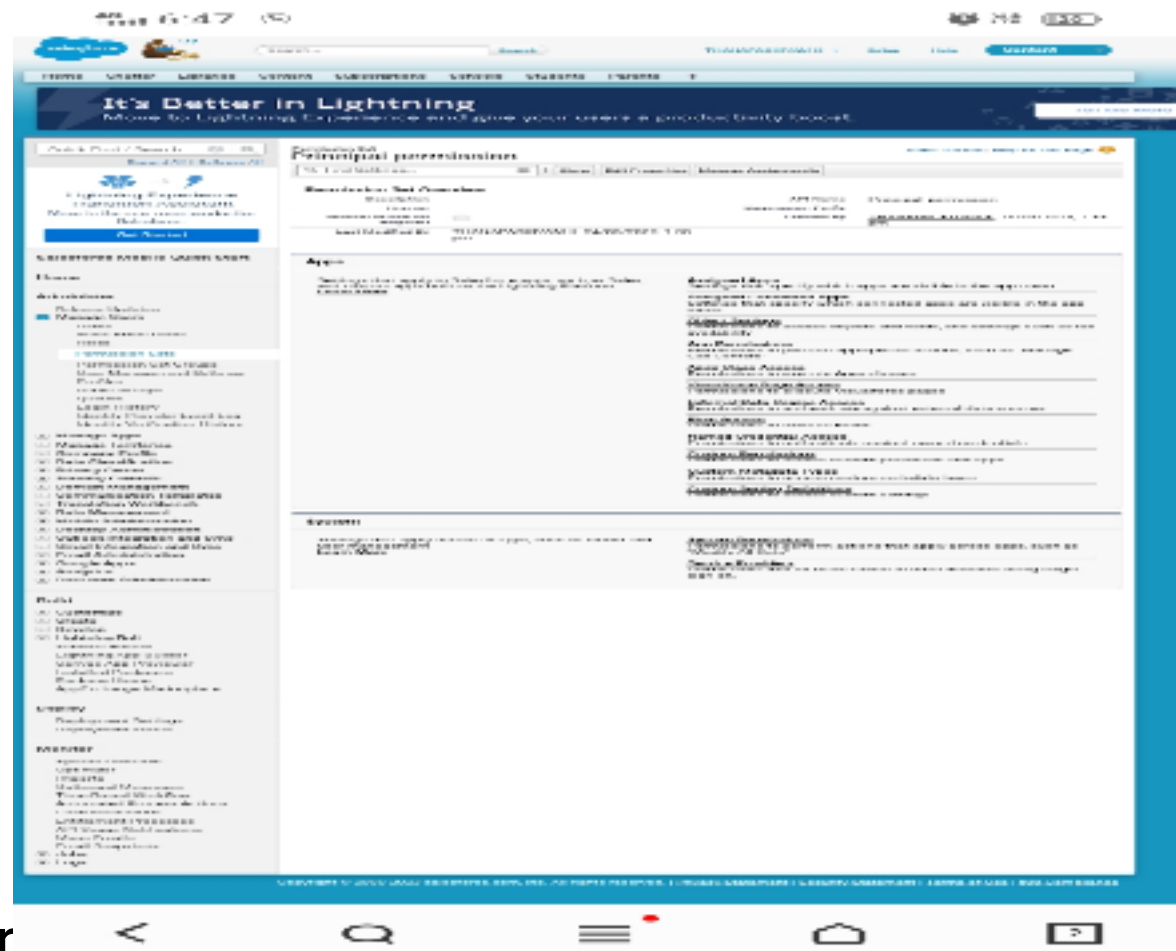
in





Mailston 7: Pemesionsets

FROM setup enter permission setin the quick findbox then select permission sets give then am of permissionset name has teacher permission and then under the objectsets give the view create and edit permission to all custome object and assign

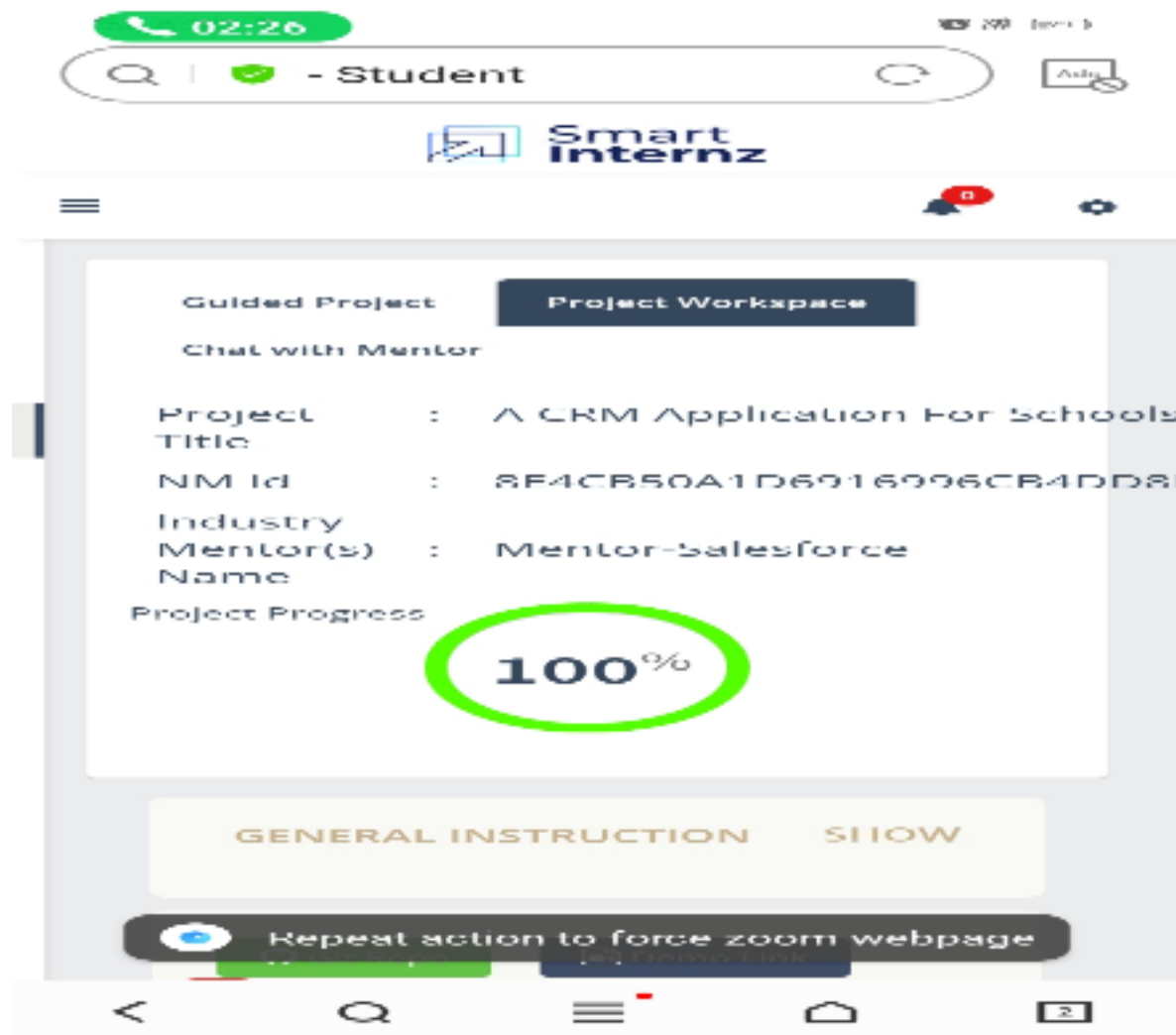


to the teacher user



From the report tab click new report we select the report type

```
create customisedy our reportbthenbsave or runit
```



4 TrailheadProfilePublicURL

Team Lead -

<https://trailblazer.me/id/thana2002>

TeamMember1-

<http://trailblazer.me/id/susmm7>

Team Member 2_

<https://trailblazer.me/id/ssrisha1>

Team Member3-

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

Team Member 4_

<http://trailblazer.me/id/vvishnupriya2>

5 ADVANTAGES&DISADVANTAGE

Advantage:

Improve Student Admissions Lifecycle. ...

Track Student Life-Cycles Within the Institution. ...

Keep Alumni Information Safe and Accessible. ...

Stay Connected with Teams. ...

Monitor Fee Payments and Reminders.

Disadvantage:

CRM costs. One of the greatest challenges to CRM implementation is cost. ...

Business culture. A lack of commitment or resistance to cultural

change from people within the company can cause major difficulties with CRM implementation. ...

Poor communication. ...

Lack of leadership.

6 APPLICATIONS

An education customer relationship management software (CRM) manages all your institution's interactions with prospective and current students. It also supports managing communications with alumni, employees, donors, and other members of the education sector in your institution.

7 CONCLUSION

education CRM systems provide a comprehensive solution for attracting, managing and scaling enrolments. By automating tasks, providing valuable insights, and facilitating communication and collaboration, education CRM systems can help you to achieve your organisational goals.

8 FUTURESCOPE

It is quite certain that with great precision the new-gen technology of CRM solutions will help in the sales and marketing to a great deal. This will be done while calculating the better results attained by the marketing team.

The progression of CRM in the future would mostly depend on how faster API's redefines cloud platforms. And it is simply the beginning of API's era of integrating CRM solution with the business application.

CRM is predicted to become more powerful to support customer first, not company first businesses. Bringing together disparate teams, data, and system integrations, the CRM of the future is set to be centralized and empowered by AI and mobile capabilities