

1.INTRODUCTION

OVERVIEW

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

Contract lifecycle management (CLM) automates and streamlines contract processes during key stages. These stages include initiation, authoring, process and workflow, negotiation and approval, execution, ongoing management and compliance (within the repository), and contract renewal.

A CRM is a system that helps schools manage the entire lifecycle of a potential customer — sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access place.

PURPOSE

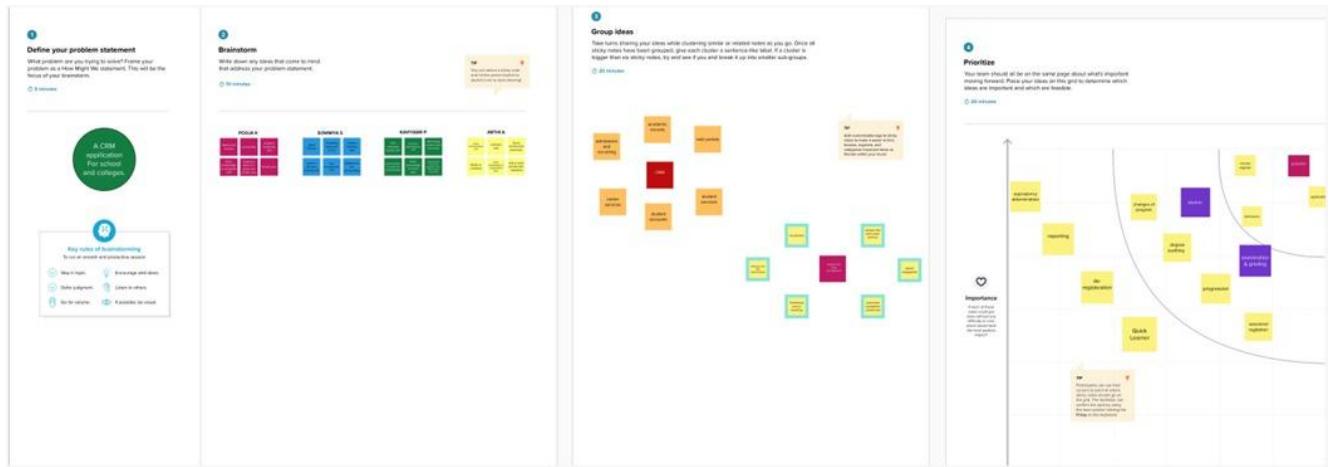
You can use a CRM to plan outreach, analyze performance, manage customer interactions, and streamline billing and customer support processes.

2. PROBLEM DEFINITION & DESIGN THINKING

EMPATHY MAP



IDEATION & BRAINSTORM MAP



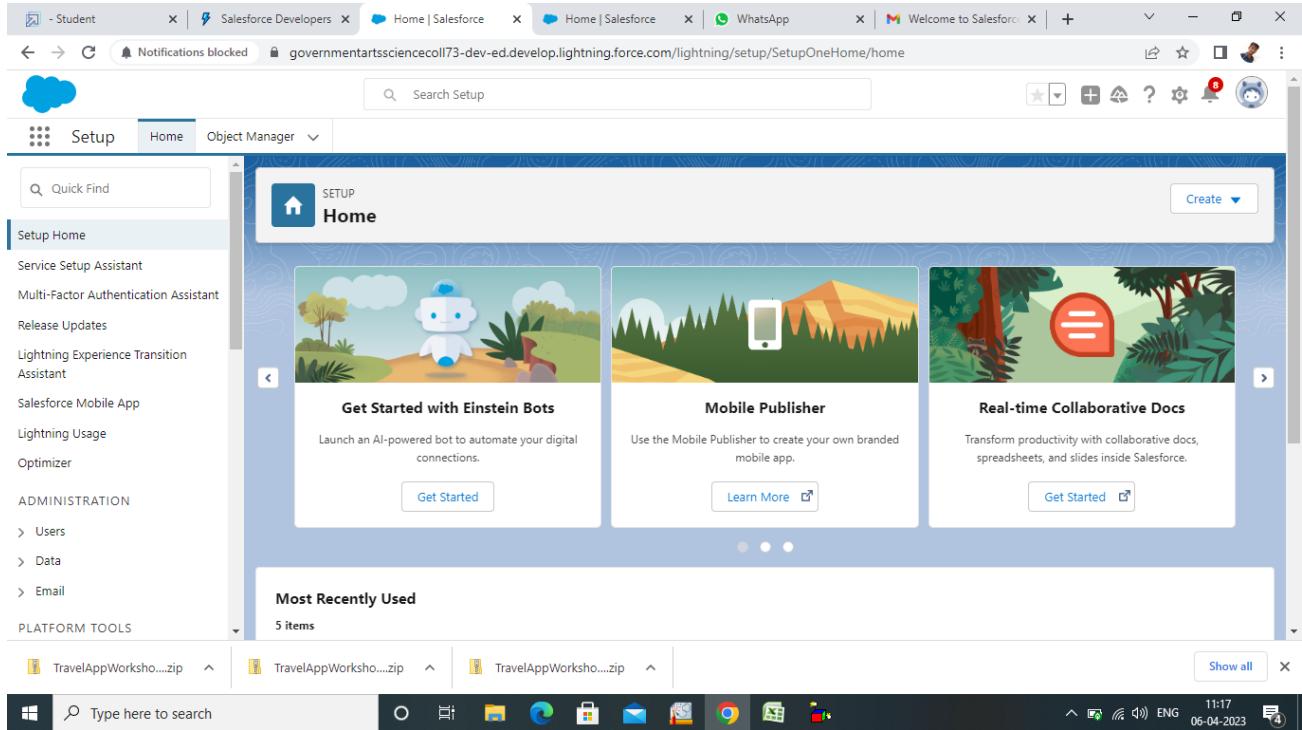
3. RESULT

3.1 Data Model

OBJECT NAME	FIELD IN OBJECT	
	FIELD LABEL	DATA TYPE
Student	Address	Text
	Phone Number	Phone
	Results	Picklist
	FIELD LABEL	DATA TYPE
School	Number of students	Roll up summary
	Highest mark	Roll up summary
	Class	Number
	FIELD LABEL	DATA TYPE
Parent	Parent Address	Text
	Phone Number	Phone

3.2 Activity & Screenshot

Milestone-1: Creation of Developer Account



Milestone-2: Object

Activity-1: Creation of School Object

https://governmentartssciencoll73-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home

governmentartssciencoll73-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home

Cloud Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

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
Edit	schools	Books	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

New | What Is This?

Help for this Page

https://governmentartssciencoll73-dev-ed.lightning.force.com/one/one.app#/setup/CustomTabs/home

Type here to search

Cloud Setup Home Object Manager

Q tabs

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Rename Tabs and Labels

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

SETUP Tabs

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object: Students

Tab Style: Airplane

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

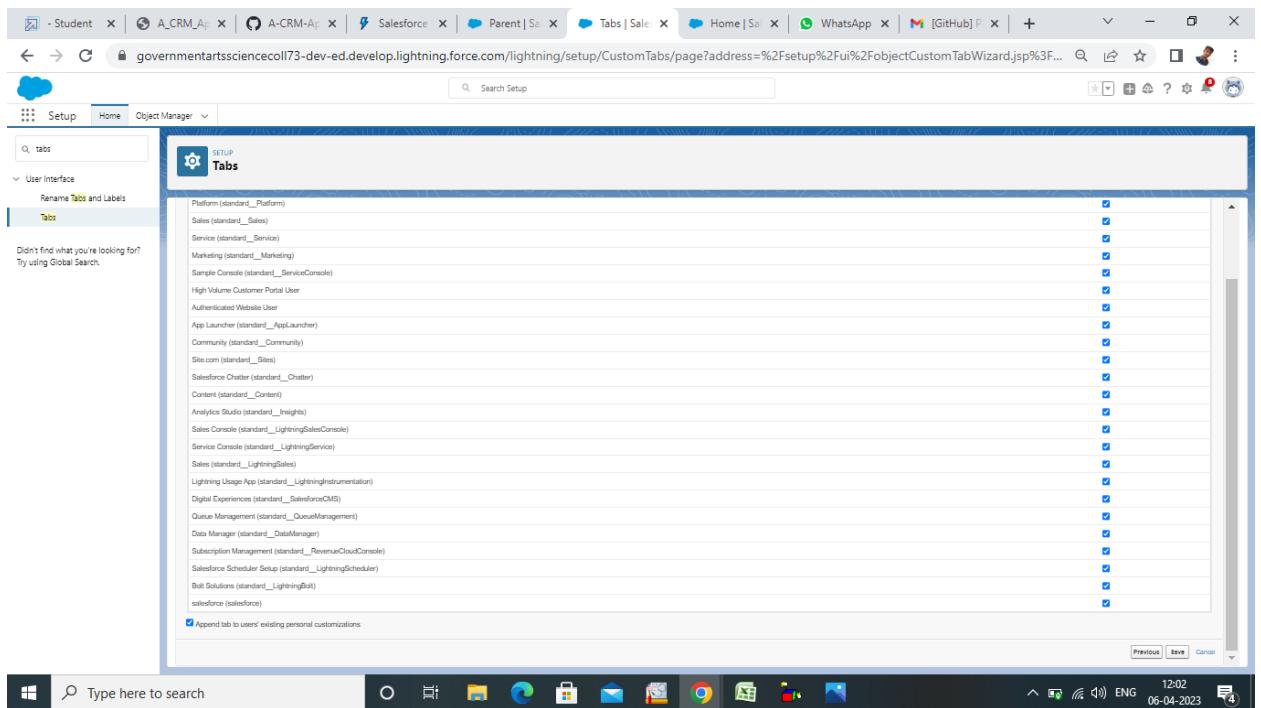
Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

12:01 ENG 06-04-2023



Activity 2: Creation parent object

The image displays two screenshots of the Salesforce Lightning Experience interface.

Screenshot 1: Custom Tabs Setup

This screenshot shows the 'Custom Tabs' section within the 'Setup' menu. It includes sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Under 'Custom Object Tabs', there is a table with one row:

Action	Label	Tab Style	Description
Edit Del	Books	Books	
Edit Del	Students	Students	

Screenshot 2: Edit Custom Object - Parent

This screenshot shows the 'Edit Custom Object' page for the 'Parent' object. The left sidebar lists various configuration tabs: 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, Validation Rules, and Object Classification.

The main form contains the following fields:

- Custom Object Definition Edit:** Includes 'Save', 'Save & New', and 'Cancel' buttons.
- Custom Object Information:** Shows 'Label' (Parents) and 'Plural Label' (Parents). A note says: "The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates." An 'Example' field shows 'Account'.
- Object Name:** Shows 'Object Name' (Parent) and 'Example' (Account).
- Description:** A large text input field.
- Context-sensitive Help Setting:** Options include 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.
- Content Name:** A dropdown menu set to 'None'.
- Enter Record Name Label and Format:** Shows 'Record Name' (Parent Name) and 'Example' (Account Name). A note states: "The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API." A 'Data Type' dropdown is set to 'Text'.
- Optional Features:** A list of checkboxes:
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing

Milestone-3: Lightning App

Activity:

Screenshot showing the creation of a new custom object in Salesforce Setup.

New Custom Object

Content Name: Teacher Name

Record Name: Teacher Name

Data Type: Text

Optional Features:

- Allow Reports
- Allow Activities
- Allow Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification:

Deployment Status:

Search Status:

Object Creation Options:

Save | Save & New | Cancel

New Lightning App

App Details & Branding

App Name: Name your app...

Developer Name: Enter a developer name...

Description: Build CRM Analytics dashboards and apps

Image: Upload

Primary Color Hex: #0070D2

Flow Category: Lightning Bolt Solutions

Mobile Apps:

Next

Screenshot (14).pdf

Salesforce

New Lightning App

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name: New Lightning

* Developer Name: New_Lightning

Description: Naan mudhalvan project activity

App Branding

Image:

Primary Color Hex: #0070D2

Org Theme Options: Use the app's image and color instead of the org's

Flow Category: Lightning Bolt Solutions

2 Analytics Studio Insights Build CRM Analytics dashboards and apps 25/03/2023, 4:32 pm Classic ✓

3 App Launcher AppLauncher App Launcher tabs 25/03/2023, 4:32 pm Classic ✓

Next

Screenshot (14).pdf Show all

This screenshot shows the 'New Lightning App' setup page in the Salesforce Setup. It includes fields for App Name, Developer Name, and Description, along with branding options like a primary color hex and org theme settings. A flow category section is also visible at the bottom.

Type here to search

12:13 06-04-2023

New Lightning App

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment: Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back Next

Flow Category: Lightning Bolt Solutions

2 Analytics Studio Insights Build CRM Analytics dashboards and apps 25/03/2023, 4:32 pm Classic ✓

3 App Launcher AppLauncher App Launcher tabs 25/03/2023, 4:32 pm Classic ✓

Screenshot (14).pdf Show all

12:13 06-04-2023

This screenshot shows the 'Utility Items (Desktop Only)' setup page. It allows users to add utility items to the desktop footer. A descriptive text box explains the utility bar's function. A back and next button are present at the bottom, along with a flow category section at the bottom.

The screenshot shows two consecutive steps in the "New Lightning App" setup process:

Step 1: Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Accounts
- Alert Settings
- All Sites

Selected Items

Step 2: User Profiles

Choose the user profiles that can access this app.

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website

Selected Profiles

Buttons

- Back
- Next
- Save & Finish

Flow Category

2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	25/03/2023, 4:32 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	25/03/2023, 4:32 pm	Classic	✓

Mobile Apps

Milestone-4: Fields and Relationship

Activity-1:

Salesforce Setup - governmentartssciencoll73-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

Cloud icon

Search Setup

Setup Home Object Manager

Q app

Enable App Cloning (Disabled)

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

App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
14 Sales	Sales	The world's most popular sales force automation (SFA) solution.	25/03/2023, 4:32 pm	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more.	25/03/2023, 4:35 pm	Lightning	✓
16 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records at once.	25/03/2023, 4:32 pm	Lightning	✓
17 salesforce	salesforce	management system	25/03/2023, 5:19 pm	Lightning	✓
18 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and news feeds.	25/03/2023, 4:32 pm	Classic	✓
19 Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	25/03/2023, 4:34 pm	Lightning	✓
20 Service	Service	Manage customer service with accounts, contacts, cases, and more.	25/03/2023, 4:32 pm	Classic	✓
21 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records at once.	25/03/2023, 4:32 pm	Lightning	✓
22 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com builder.	25/03/2023, 4:32 pm	Classic	✓
23 Subscription Mana...	RevenueCloudConsole	Get started automating your revenue processes.	25/03/2023, 4:32 pm	Lightning	✓

Show all

Screenshot (14).pdf

Type here to search

Cloud icon

Search Setup

Setup Home Object Manager

Object Milestone

SETUP > OBJECT MANAGER

Details

Fields & Relationships	Description
Page Layouts	API Name
Buttons, Links, and Actions	EntityMilestone
Compact Layouts	Custom
Field Sets	Singular Label
Object Limits	Object Milestone
Record Types	Plural Label
Related Lookup Filters	Object Milestones
Triggers	Enable Reports
	Track Activities
	Track Field History
	Deployment Status
	Help Settings
	Standard salesforce.com Help Window

Screenshot (20).pdf

Screenshot (14).pdf

Screenshot (14).pdf

Show all

Type here to search

Cloud icon

Search Setup

Setup Home Object Manager

Object Milestone

SETUP > OBJECT MANAGER

Details

Fields & Relationships	Description
Page Layouts	API Name
Buttons, Links, and Actions	EntityMilestone
Compact Layouts	Custom
Field Sets	Singular Label
Object Limits	Object Milestone
Record Types	Plural Label
Related Lookup Filters	Object Milestones
Triggers	Enable Reports
	Track Activities
	Track Field History
	Deployment Status
	Help Settings
	Standard salesforce.com Help Window

Screenshot (20).pdf Screenshot (14).pdf Screenshot (14).pdf Show all

governmentartssciencecoll73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/EntityMilestone/FieldsAndRelationships/view

Setup Home Object Manager

Object Milestone

SETUP > OBJECT MANAGER

Object Milestone

Details Fields & Relationships

Fields & Relationships 21 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Business Hours	BusinessHoursId	Lookup(Business Hours)		
Completed	IsCompleted	Checkbox		
Completion Date	CompletionDate	Date/Time		
Elapsed Time (Days)	ElapsedTimeInDays	Number(4, 2)		
Elapsed Time (Hours)	ElapsedTimeInHrs	Number(4, 2)		
Elapsed Time (Mins)	ElapsedTimeInMins	Number(9, 0)		
Entitlement Process	SlaProcessId	Lookup(Entitlement Process)		
Milestone	MilestoneId	Lookup(Milestone)		

Screenshot (20).pdf Screenshot (14).pdf Screenshot (14).pdf Show all

governmentartssciencecoll73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/EntityMilestone/FieldsAndRelationships/new

Setup Home Object Manager

Object Milestone

SETUP > OBJECT MANAGER

Object Milestone

New Custom Field

Step 1 Step 1

Choose the field type

Specify the type of information that the custom field will contain.

Data Type

Select one of the data types below.

None Selected

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list.

Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom field. The URL is governmentartssciencecoll73-dev-ed.lightning.force.com/lightning/setup/ObjectManager/EntityMilestone/FieldsAndRelationships/new. The page title is "Object Milestone - New Custom Field". The left sidebar shows "Fields & Relationships" selected. The main content area is titled "Step 1. Choose the field type". It asks to specify the type of information the custom field will contain. Under "Data Type", the "None Selected" option is selected. Other options shown are "Auto Number", "Formula", and "Roll-Up Summary". A note for "Formula" states: "A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change." A note for "Roll-Up Summary" states: "Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list." There are "Next" and "Cancel" buttons at the bottom right.

The screenshot shows the continuation of the custom field creation process. The URL is the same as the previous screenshot. The page title is now "Object Milestone - Identity User". The left sidebar shows "Fields & Relationships" selected. The main content area displays a list of user profiles with checkboxes for selecting which ones have access to the custom field. The profiles listed are: Identity User, Marketing User, Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Salesforce API Only System Integrations, Silver Partner User, Solution Manager, Standard Platform User, Standard User, System Administrator, and Work.com Only User. Most profiles have the checkbox checked. At the bottom right, there are "Previous", "Next", and "Cancel" buttons.

Screenshot of the Salesforce Lightning setup interface showing Step 4 of 4 for adding a new custom field named "Students".

Object Milestone New Custom Field

Step 4. Add to page layouts

Field Label: Students
Data Type: Text Area
Field Name: Students
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Object Milestone Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

Previous Save & New Save Cancel

Screenshot of the Salesforce Lightning setup interface showing Step 3 of 4 for establishing field-level security.

Object Milestone New Custom Field

Step 3. Establish field-level security

Field Label: Parent
Data Type: Text Area
Field Name: Parent
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Previous Next Cancel

Screenshot of the Salesforce Object Manager setup page for creating a new custom field.

Object Milestone

New Custom Field

Step 4. Add to page layouts

Field Label: Parent
Data Type: Text Area
Field Name: Parent
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Object Milestone Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Screenshot of the Salesforce Object Manager setup page for creating a new custom field.

Object Milestone

Fields & Relationships

Field Label: Teacher
Field Name:
Description:
Help Text:

Required: Always require a value in this field in order to save a record
Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picker values in double quotes. Use `{!RefId}` to include numbers without quotes.
Use `{!Text}` to show percentages as decimals (0.10), and express date calculations in the standard format ('Today() + 7'). To reference a field from a Custom Metadata type record use: `$CustomMetadataType__mdt.RecordAName.Field__c`

Previous Next Cancel

The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Fields & Relationships' selected. The main area displays a grid of user profiles with checkboxes indicating field visibility. The columns are 'Identity User' and 'Object Milestone'. The rows include Marketing User, Minimum Access - Salesforce, Partner App Subscription User, Partner Community Login User, Partner Community User, Read Only, Salesforce API Only System Integrations, Silver Partner User, Solution Manager, Standard Platform User, Standard User, System Administrator, and Work.com Only User.

Identity User	Object Milestone
Marketing User	<input checked="" type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>
Salesforce API Only System Integrations	<input checked="" type="checkbox"/>
Silver Partner User	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>
Work.com Only User	<input checked="" type="checkbox"/>

Activity-2: Creation of fields for the Student objects:

The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Fields & Relationships' selected. The main area displays a 'New Custom Field' page for the 'Object Milestone' object. The field is named 'Teacher', has a 'Text Area' data type, and a 'Teacher' field name. The 'Description' section is empty. The 'Step 4. Add to page layouts' step is shown, with 'Object Milestone Layout' selected under 'Page Layout Name'. The status bar indicates it's Step 4 of 4.

Help for this Page ?

Step 4 of 4

Previous Save & New Save Cancel

Field Label Teacher
Data Type Text Area
Field Name Teacher
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Object Milestone Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Screenshot of the Salesforce Object Manager interface for the 'Object Milestone' custom object.

The left sidebar shows the following sections:

- Details
- Fields & Relationships** (selected)
- Page Layouts
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Triggers
- Flow Triggers
- Validation Rules

The main content area is titled "Fields & Relationships" and displays 24 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Business Hours	BusinessHoursId	Lookup(Business Hours)		
Completed	IsCompleted	Checkbox		
Completion Date	CompletionDate	Date/Time		
Elapsed Time (Days)	ElapsedTimeInDays	Number(4, 2)		
Elapsed Time (Hours)	ElapsedTimeInHrs	Number(4, 2)		
Elapsed Time (Mins)	ElapsedTimeInMins	Number(9, 0)		
Entitlement Process	SlaProcessId	Lookup(Entitlement Process)		
Milestone	MilestoneId	Lookup(Milestone)		
Parent	Parent__c	Text Area(255)		

Screenshot of the Salesforce Object Manager interface for creating a new custom object named "School".

The top banner displays a message: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with links to "Tell me more!" and "Don't show this message again".

The "Custom Object Definition Edit" screen includes the following sections:

- Custom Object Information**:
 - Label: School (Example: Account)
 - Plural Label: Schools (Example: Accounts)
 - Starts with vowel sound:
- Object Name**:
 - Object Name: School (Example: Account)
- Description**: A large text input field.

At the bottom, there are buttons for "Save", "Save & New", and "Cancel".

Activity-3:Creation of fields for the parent objects:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Student', 'Upload files - vimal1123/A-CRM...', 'New Custom Object | Salesforce', and '+'. The main header says 'governmentartsciencecoll73-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page title is 'SETUP New Custom Object'. The 'Object Classification' section has 'Allow Sharing' checked. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' checked. The 'Object Creation Options' section has 'Add Notes and Attachments related list to default page layout' unchecked and 'Launch New Custom Tab Wizard after saving this custom object' unchecked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the 'Object Manager' interface with the title 'Object Manager'. The sub-page is 'New Custom Object'. A message at the top says 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' with links to 'Tell me more!' and 'Don't show this message again'. The 'Custom Object Definition Edit' section contains 'Custom Object Information'. It shows 'Label' as 'Parent' and 'Plural Label' as 'Parents'. There is a note about 'Starts with vowel sound'. The 'Object Name' field also contains 'Parent'. The 'Description' field is empty. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Milestone-5: Profile

Activity: Creation on profile:

The screenshot shows the Salesforce Setup interface with the following details:

Top Navigation: Student - Upload files - vimal1123/A-CRM - Profiles | Salesforce - Download file | iLovePDF

Left Sidebar: Q. profil, Users, Profiles (selected), Help for this Page

Search Bar: Search Setup

Content Area:

- Profiles:** All Profiles | Edit | Delete | Create New View | New Profile | Help for this Page
- Table:** A grid of profiles with columns: Action, Profile Name, User License, and Custom. Some profiles have checkboxes next to them.
- Bottom:** Page 1 of 2, Previous, Next, Help for this Page

Second Window (Clone Profile):

Type here to search

22:18 06-04-2023

Student - Upload files - vimal1123/A-CRM - Profiles | Salesforce - Download file | iLovePDF

Cloud icon, Setup, Home, Object Manager

Q. profil, Users, Profiles (selected), Help for this Page

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

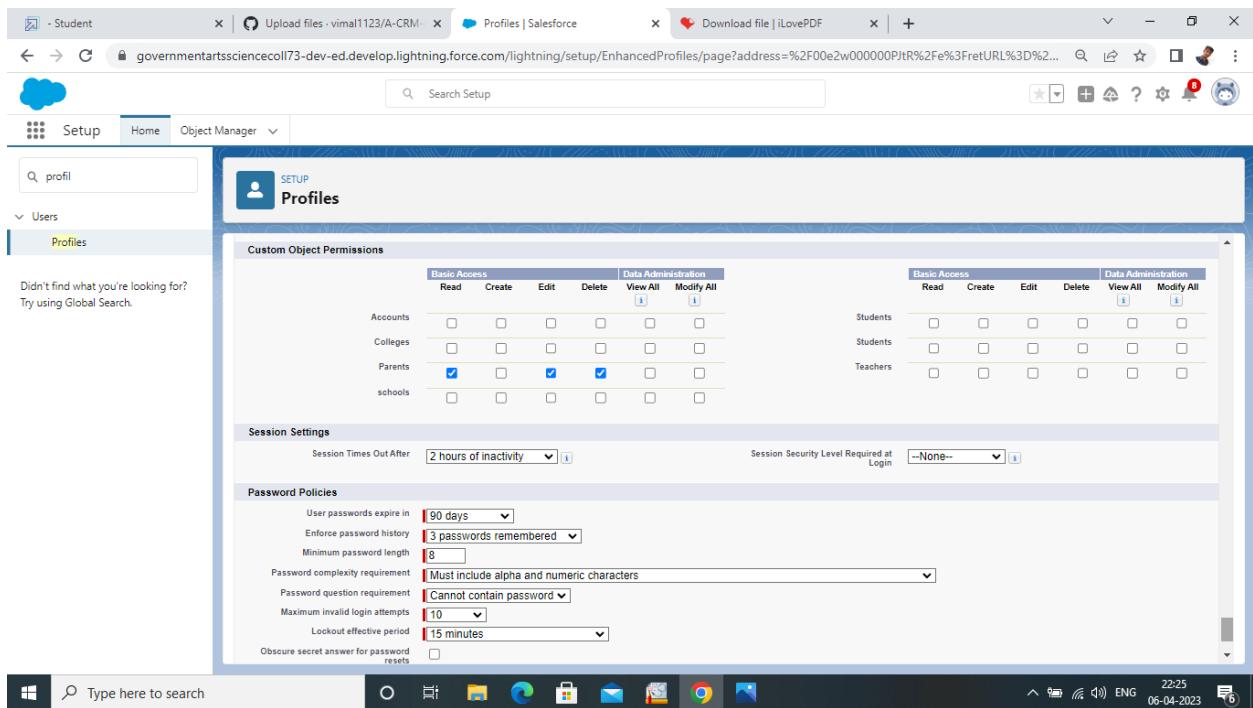
Clone Profile:

Enter the name of the new profile. You must select an existing profile to clone from. * = Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	School profile

Save | Cancel

22:19 06-04-2023



Milestone-6: Users

Activity: Creation of Users

Screenshot of the Salesforce Setup interface showing the 'Users' page.

The left sidebar shows the navigation menu under 'Users':

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users

The main content area displays the 'All Users' list:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Export	Chatter	phathy20d2w00000rmfcean.gbbzQumsI2@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	J_VIMAL	VJ	vimal1123@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d2w00000rmfcean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d2w00000rmfcean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Buttons at the bottom: New User, Reset Password(s), Add Multiple Users.

Screenshot of the Salesforce Setup interface showing the 'New User' creation page.

The left sidebar shows the navigation menu under 'Users':

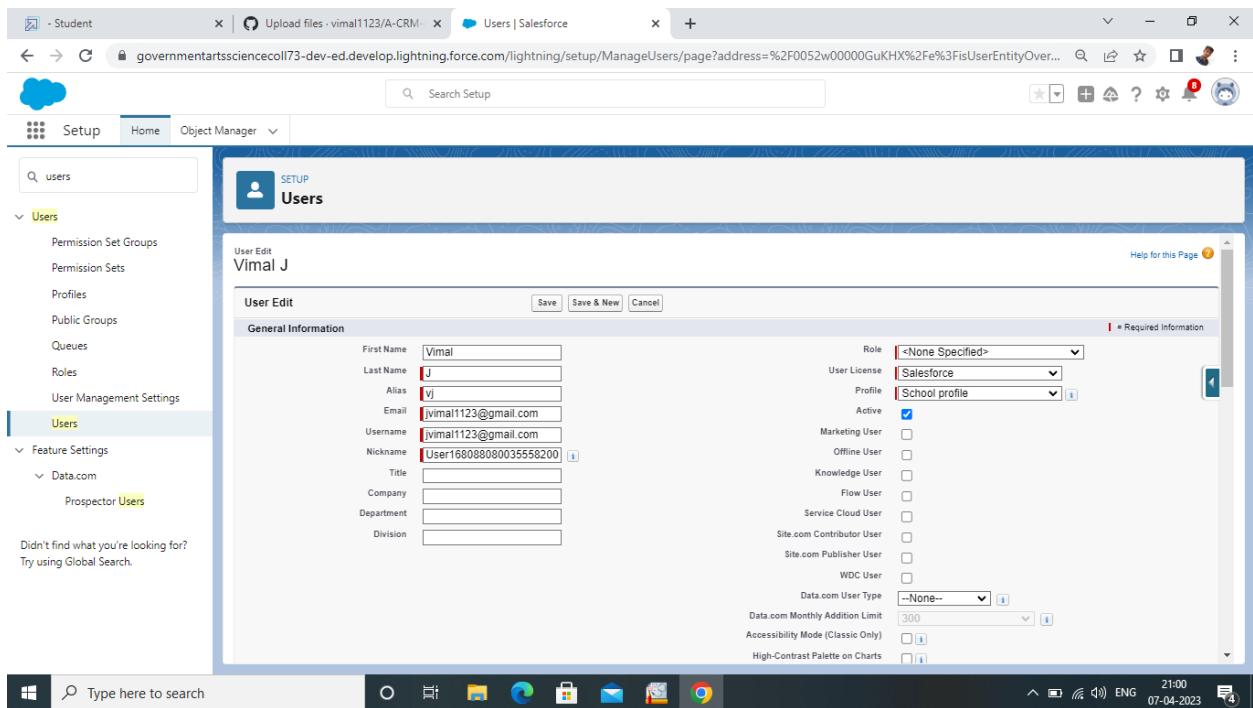
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users

The main content area displays the 'New User' form:

User Edit (Save, Save & New, Cancel)

General Information (Required information marked with a red asterisk)

First Name	Parent	Role	<None Specified>
Last Name	*	User License	Salesforce
Alias	*	Profile	School profile
Email	vimal1123@gmail.com	Active	<input checked="" type="checkbox"/>
Username	vimal1123@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User168088080035558200	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>



Milestone-7:Permission sets

Activity:Permission sets

Screenshot of the Salesforce Permission Sets page:

The URL is governmentartssciencecoll73-dev-ed.lightning.force.com/lightning/setup/PermSets/home

The page title is "Permission Sets".

The sidebar shows "Users" expanded, with "Permission Set Groups" and "Permission Sets" selected.

The main content area displays a table of permission sets:

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Com...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers t...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers t...	Service Cloud Voice User
Del Clone	Experience Profile Manager	Salesforce	
Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager

Page 1 of 2

Screenshot of the "Enter permission set information" page:

The URL is governmentartssciencecoll73-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

The page title is "Permission Sets".

The sidebar shows "Users" expanded, with "Permission Set Groups" and "Permission Sets" selected.

The main content area shows the "Enter permission set information" form:

Fields filled in:

- Label: Principal permission
- API Name: Principal_permission

Other fields:

- Description: (empty)
- Session Activation Required:
- Select the type of users who will use this permission set:
 - Who will use this permission set?
 - Choose "-None-" if you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
 - Not sure what a permission set license is? [Learn more here.](#)
 - License: -None-

Screenshot of the Salesforce Permission Sets page:

The URL is: governmentartssciencecoll73-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w00000AlJv%3FsfclFrameOrigin%3Dhttps%...

The page title is: Permission Sets

The sidebar shows:

- Users
- Permission Set Groups
- Permission Sets** (selected)
- Custom Code
- Custom Permissions

The main content area shows:

Principal permission

Description: Principal permission

License: Session Activation Required:

API Name: Principal_permission
Namespace Prefix:
Created By: VIMAL_J 07/04/2023, 10:18 pm
Last Modified By: VIMAL_J 07/04/2023, 10:18 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".

Apex Class Access: Permissions to execute Apex classes.

Visualforce Page Access: Permissions to execute Visualforce pages.

External Data Source Access

Screenshot of the Salesforce Permission Set Assignment page:

The URL is: governmentartssciencecoll73-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS2w00000AlJv/PermissionSetAssignment/home

The page title is: Principal permission

The sidebar shows:

... > SETUP > PERMISSION SET PRINCIPAL PERMISSION

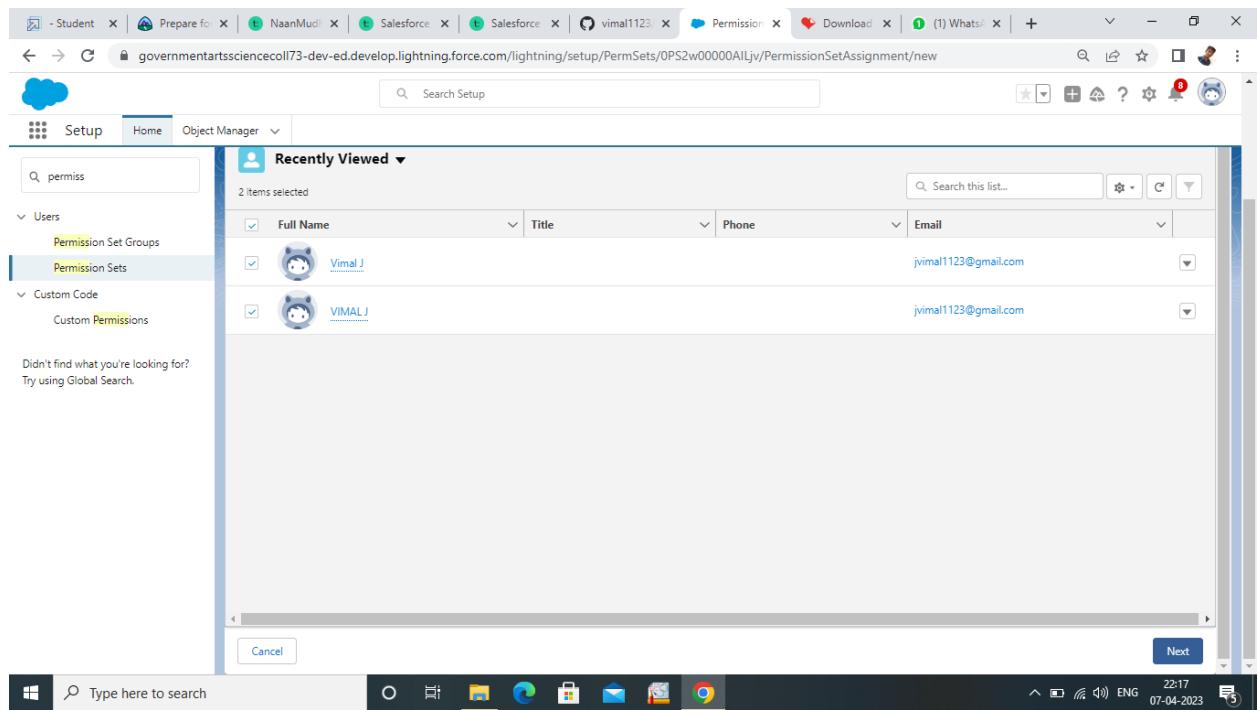
- Users
- Permission Set Groups
- Permission Sets** (selected)
- Custom Code
- Custom Permissions

The main content area shows:

Current Assignments

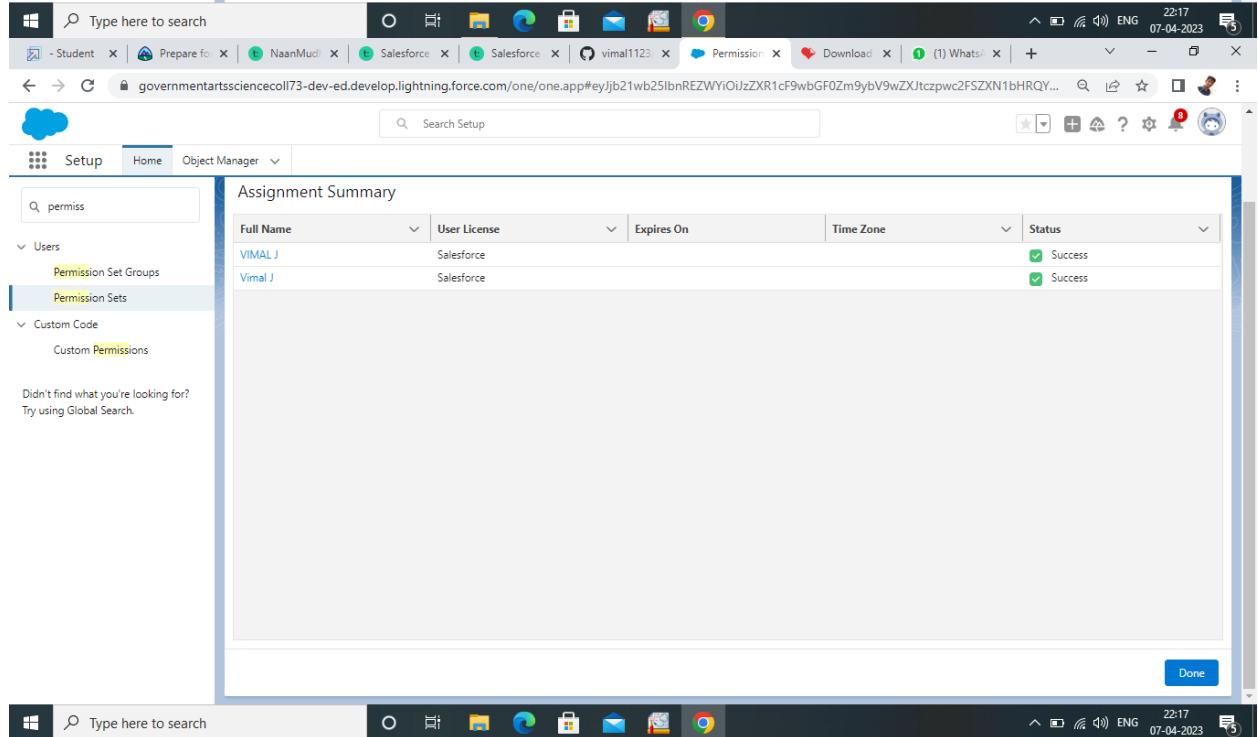
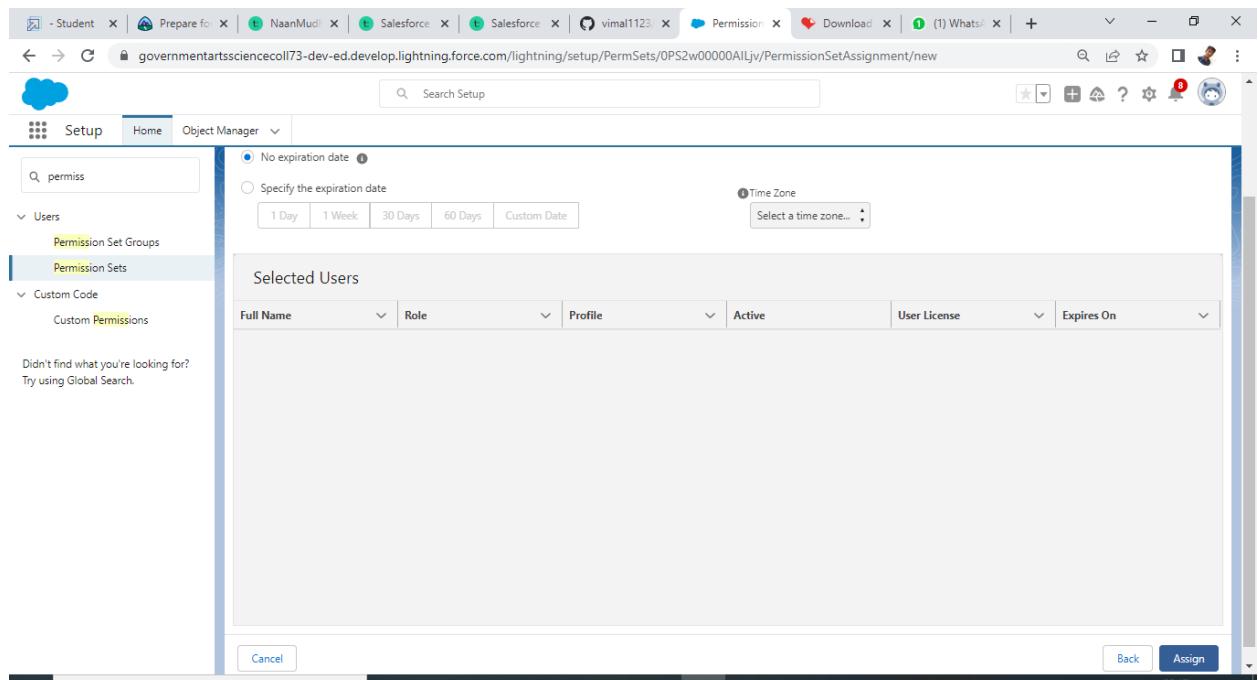
No assignments defined.

A decorative illustration of a cactus and a sun in a desert landscape.



Milestone-8:Reports

Activity: Reports



Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Create Report

Category

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and

Select a Report Type

Report Type Name Category

Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Account History	Standard
Contact History	Standard

To Do List

Type here to search

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Create Report

Category

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and

Select a Report Type

Report Type Name Category

Individual History	Standard
Accounts	Standard
schools	Standard
Students	Standard
Teachers	Standard
Parents	Standard
Colleges	Standard
Students	Standard
Screen Flows	Custom

Details

schools Standard Report Type

Start Report

Fields (12)

Created By You
No Reports Yet

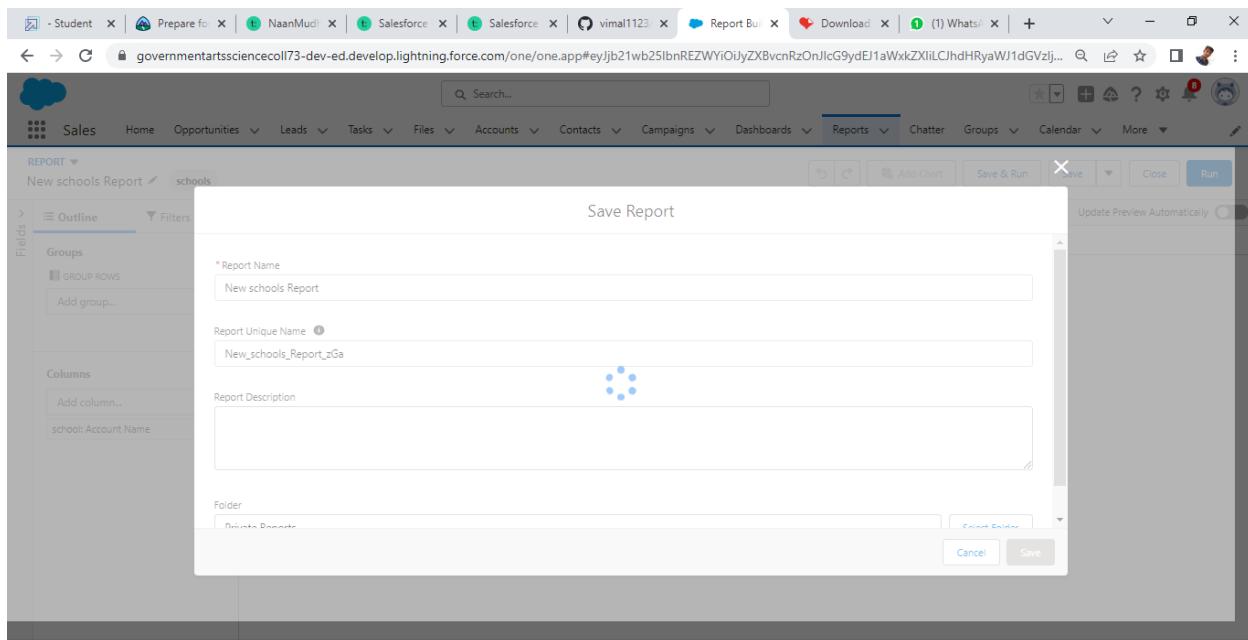
Created By Others
No Reports Yet

Objects Used in Report Type

To Do List

Type here to search

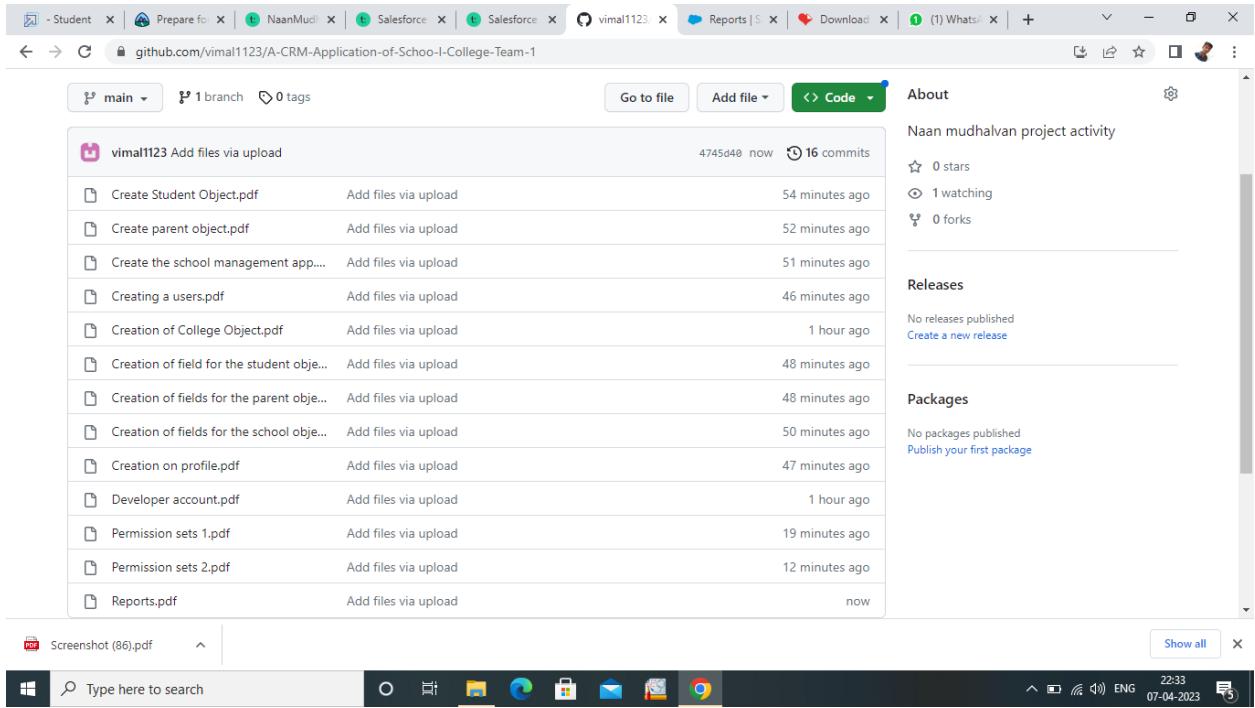
22:28 ENG 07-04-2023



The screenshot shows the "All Reports" page in the Salesforce Lightning interface. The sidebar on the left lists categories: REPORTS, FOLDERS, and FAVORITES. The main area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New schools Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	VIMAL J	7/4/2023, 10:29 pm	
Created by Me	Sample Flow Report: Screen Flows	Public Reports	Automated Process		25/3/2023, 4:32 pm	





4. TRAILHEAD PROFILE PUBLIC URL

Team leader- <https://trailblazer.me/id/vimal1123>

Team Member 1- <https://trailblazer.me/id/anbu2003>

Team Member 2-

<https://trailblazer.me/id/pezhumalai1>

Team Member 3- <https://trailblazer.me/id/janasivan>

5. ADVANTAGES

Customer relationship management automation systems can benefit small and large businesses and

their teams, such as marketing, sales, customer service, field service, and project service automation teams in different aspects. Together they raise the business's growth chart by increasing the product's productivity. With this, CRM is capable of improving and simplifying complex customer engagement.

DISVANTAGES

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data mitigation, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

6. APPLICATIONS

A good CRM helps you understand your market and the needs of your customers. As you attract more customers, a CRM makes two things clear: *who* is interested in what you have to offer, and *what* is most important to them.

When it comes to winning more customers, a CRM helps you make smarter decisions than your competition and offer people what they truly want. And if customers leave or your sales stagnate, you can see common threads and change the process accordingly, to better meet their needs and retain them.

7. CONCLUSION

Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BMW has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial,

operational, managerial and development initiatives with a robust customer relationship that has fostered great sale of its product.

8. FUTURE SCOPE

These days every business industry depends on innovative technology-based CRM software. With CRM software's help, various types of complex works like sales management, customer interaction, lead management, task management, and contact management become more effortless. Besides these things, we all know that customers are an essential part of every business industry, based on their support and help every business industry increase their sales and revenue.