

# APPLICATIONS FOR SCHOOL MANAGEMENT

## 1 INTRODUCTION

**Customer relationship management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.**

### **1.1 Overview**

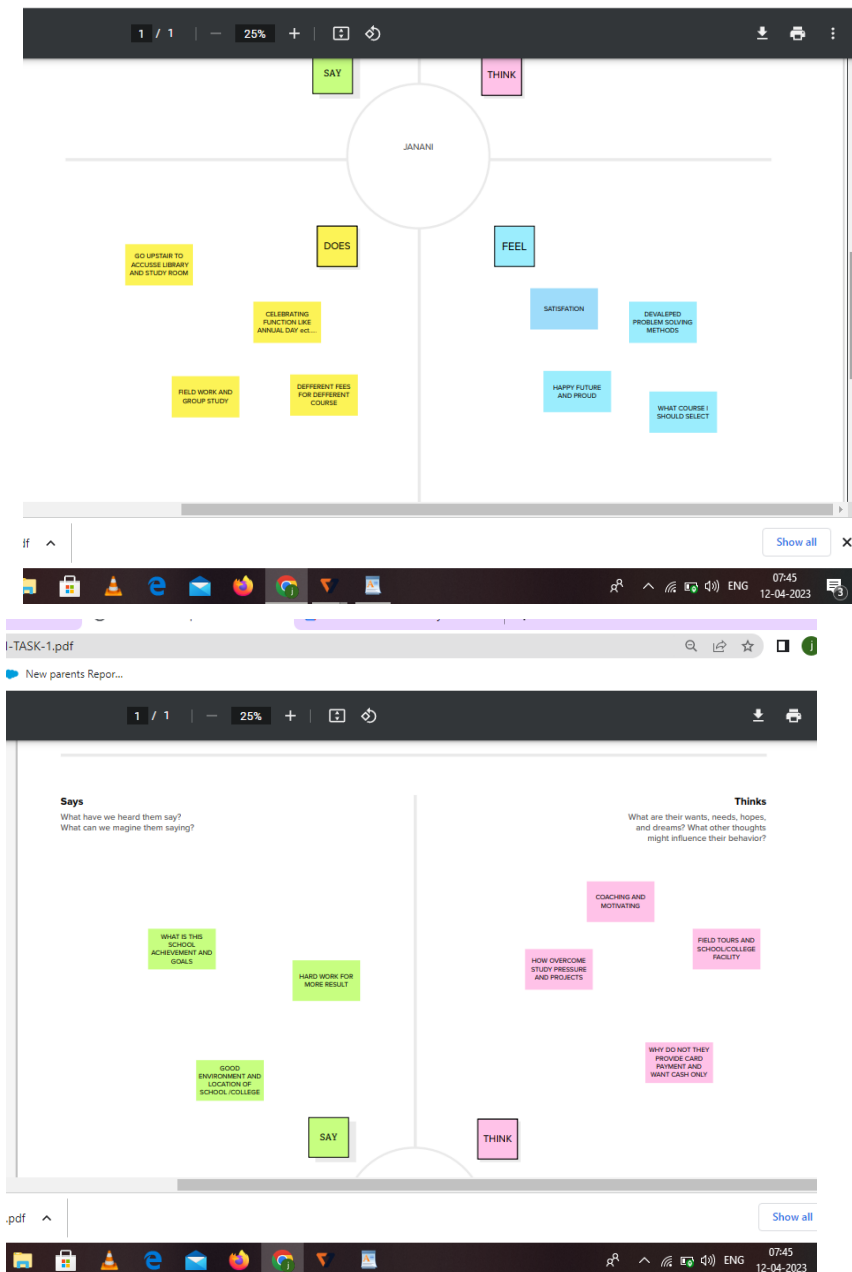
Trailhead Empowers Anyone to Learn the Tools Needed to Thrive in the Digital-first World. Learn Valuable Skills & Prove I've Got The Goods by Earning Resume-worthy Credentials. I Get Idea About Career. It Very Interesting To Learn About Salesforce. Salesforce Started as a Cloud Based Solution For CRM. CRM Stands For Customer Relationship Management. It Involves Managing All Aspects of Relationship Between an Organization and Its Customers.

### **1.2 Purpose**

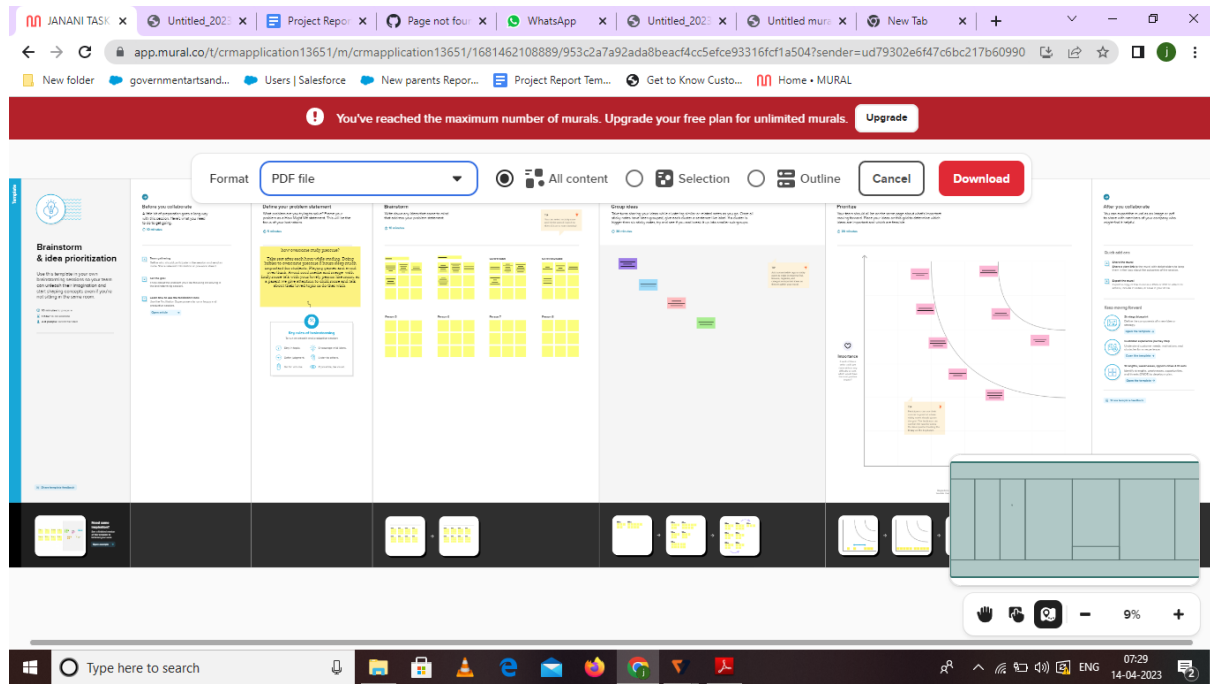
- *CRM software is used to gather customer interactions in one central place to improve customer experience and satisfaction.*
- *CRM is one of the world's fastest-growing industries, expected to grow at a rate of 14% between 2021 and 2027.*
- *The benefits of CRM include better customer retention, increased sales and detailed analytics.*
- *This article is for small business owners and marketers who want to learn about the benefits of CRM software for small businesses.*
- 

## **2 Problem Definition & Design Thinking**

### **2.1 Empathy Map**



## 2.2 Ideation & Brainstorming Map



### 3 RESULT

#### 3.1 Data Model:

Object name	Fields in the Object	
SCHOOL		
	Field label	Data type
	Address, District, State, School	Text area
	Phone number	Phone
STUDENTS	Number Of Students	Roll-Up
	Field label	Data type
	Phone number	Phone
	School	Master Detail-Relationship
	Result	Pick List
	Clss	Number

PARENTS		
	<b>Field label</b>	<b>Data type</b>
	Parents Address	Text area
	Parents Number	Phone

### 3.2 Activity & Screenshot

The screenshot shows the Salesforce Lightning App Builder interface. The browser address bar indicates the URL: `governmentartsandscience68-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004qKwCAAU&retUrl=https%3A%2F%2Fgovernmentartsan...`. The left sidebar shows the 'App Settings' menu with options: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items' (selected), and 'User Profiles'. The main content area is titled 'Navigation Items' and includes the instruction: '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.'

The 'Available Items' list on the left includes: Accounts, Alert Settings, All Sites, Alternative Payment Methods, App Launcher, Appointment Invitations, and Approval Requests. The 'Selected Items' list on the right includes: school, parents, Dashboards, and Reports. The interface also shows a 'Create' button and a search bar for filtering items.

teachers | Salesforce x parent | Salesforce x +

governmentartsandscience68-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048Vg3/Details/view

New folder governmentartsand... Users | Salesforce New parents Repor...

Search Setup

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

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

javascriptvoid(0);

Type here to search

06:27  
12-04-2023

teachers | Salesforce x Profiles | Salesforce x +

governmentartsandscience68-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

New folder governmentartsand... Users | Salesforce New parents Repor...

Search Setup

Setup Home Object Manager

Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Cust
<input type="checkbox"/> Edit   Clone	Partner App Subscription User	Partner App Subscription	
<input type="checkbox"/> Edit   Clone	Partner Community Login User	Partner Community Login	
<input type="checkbox"/> Edit   Clone	Partner Community User	Partner Community	
<input type="checkbox"/> Edit   Del   ...	Read Only	Salesforce	✓
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	
<input type="checkbox"/> Edit   Del   ...	school	Salesforce	✓
<input type="checkbox"/> Edit   Del   ...	School profile	Salesforce	✓
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	

26-41 of 41 0 Selected

Page 2 of 2

Type here to search

06:36  
12-04-2023

The screenshot shows the Salesforce Object Manager interface for the 'students' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes a description, API Name (students\_\_c), Custom (checked), Singular Label (students), Plural Label (students), and a list of settings: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Buttons for 'Edit' and 'Delete' are in the top right.

The screenshot shows the Salesforce Custom Tabs configuration page. The left sidebar has a search bar with 'tab' entered and a 'User Interface' section with links: 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' (highlighted). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title is a table of 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. The table lists three tabs: 'parents' (People style), 'school' (Books style), and 'students' (Presenter style). Below the table is a section for 'Web Tabs' which currently shows 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	parents	People	
<a href="#">Edit</a>   <a href="#">Del</a>	school	Books	
<a href="#">Edit</a>   <a href="#">Del</a>	students	Presenter	

teachers | Salesforce x School management - Lightning x

governmentartsandscience68-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004qKwCAAU&retUrl=https%3A%2F%2Fgovernmentartsan...

New folder governmentartsand... Users | Salesforce New parents Report...

Lightning App Builder App Settings Pages School management ? Help

### App Settings

#### App Details & Branding

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

#### App Details

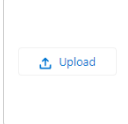
\* App Name <sup>?</sup>

\* Developer Name <sup>?</sup>

Description <sup>?</sup>

#### App Branding

Image <sup>?</sup>



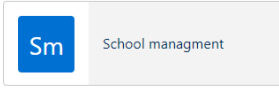
Upload

Primary Color Hex Value <sup>?</sup>

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

#### App Launcher Preview



teachers | Salesforce x school | Salesforce x

governmentartsandscience68-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048Vcz/FieldsAndRelationships/view

New folder governmentartsand... Users | Salesforce New parents Report...

Search Setup

Setup Home Object Manager

### SETUP > OBJECT MANAGER

#### school

Details

**Fields & Relationships**

9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone number	Phone_number__c	Phone		
School Name	Name	Text(80)		✓
School website	School_website__c	Text Area(255)		
State	State__c	Text Area(255)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

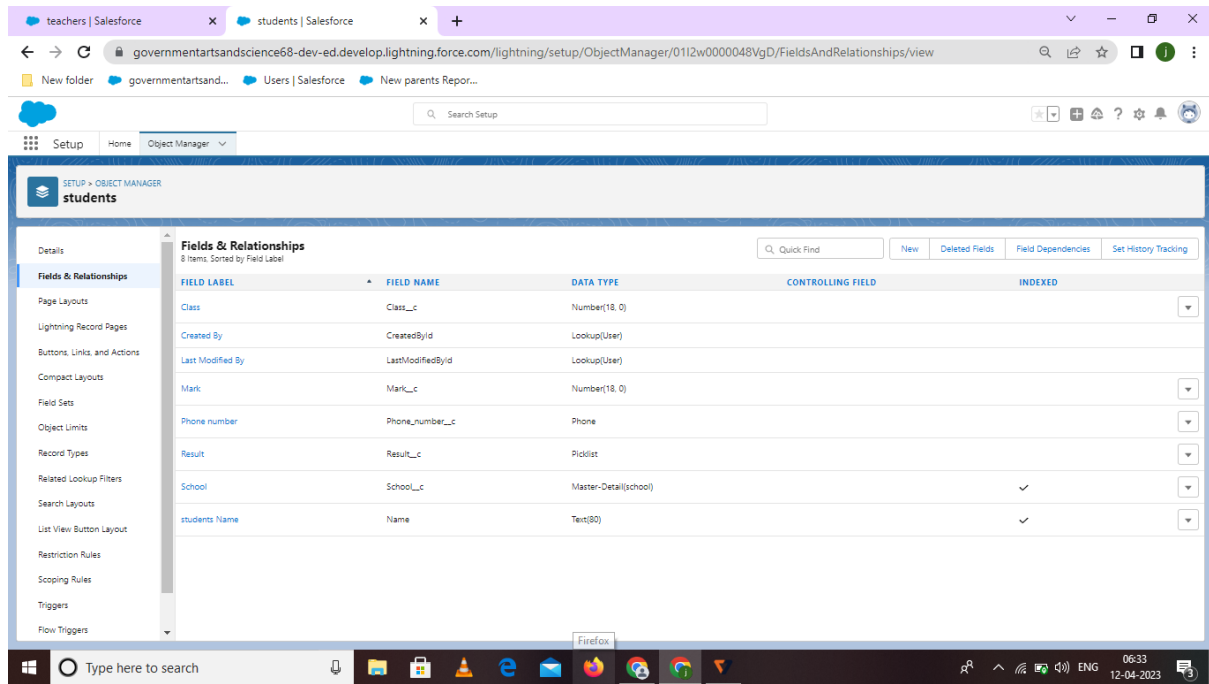
List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers



## 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/jannamalai2>  
 Team Member 1 - <https://trailblazer.me/id/gowthamisoni>  
 Team Member 2 - <https://trailblazer.me/id/sskarthika>  
 Team Member 3 – <https://trailblazer.me/id/ssathyavani>

## 5 ADVANTAGES & DISADVANTAGE

ADVANTAGES	DISADVANTAGE
Convenient & Flexible	Lack Of Focus
Less In Cost	Health Problem
Maximum Attendance	Lack Of Social Skill
Better Attention	No Practicals
Limited Competition	Server Problems



Tech- Learning	Online Tricks
Worldwide Connectivity	Difficult

## 6 APPLICATIONS

Salesforce Customer Relationship Management (CRM) software has a variety of features and capabilities that makes it the perfect choice for businesses of all sizes. Whether your business is in manufacturing, retail, service, or any other industry, Salesforce CRM can meet your requirements.

One of the benefits of using Salesforce CRM software is its flexibility. You can customise the software to fit your specific requirements and needs. This allows you to save time and money by not having to create custom settings or applications from scratch. Additionally, Salesforce provides integrations with a variety of other platforms and services, so you can easily access data from various source

## 7 CONCLUSION

Many CRM platforms offer automated marketing tools, allowing users to maintain basic contact with multiple contacts effortlessly. This is great for influencing a prospect's decisions early on, but also particularly useful in dealing with follow-up workloads during the admissions process and automated emailing or text messaging throughout. Automation functions are usually heavily customizable so that they reflect the personality of the user and don't come across as cold or robotic.

The lead capture features of school CRM are useful in following the progress of prospective students through their admissions journey and into enrollment, and then maintaining follow-up and post-graduation contact too. All the small but time-consuming prompts and reminders to prospects

and students can be automated, saving more time for face-to-face meetings.

School CRM doesn't have to simply focus on the students. Staff recruitment can be handled much in the same way.

## **8 FUTURE SCOPE**

Salesforce is the world's largest cloud Customer Relationship Management (CRM), designed to help you build client interactions, develop apps, and integrate with other systems. If you're an IT professional looking for a way to specialise in a particular field with promising career possibilities, Salesforce is a go-to choice today.

Salesforce certifications are an excellent approach to developing technical knowledge and skills in the world's most popular CRM platform. Because the number of end-users on the Salesforce platform is growing, getting started with Salesforce now feels more appropriate and essential than ever. There is a scarcity of highly skilled Salesforce professionals in enterprises and multinational companies.