

A CRM APPLICATION FOR SCHOOLS/COLLEGES

1. INTRODUCTION:

1.1 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.

What Is a CRM for Education? 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.

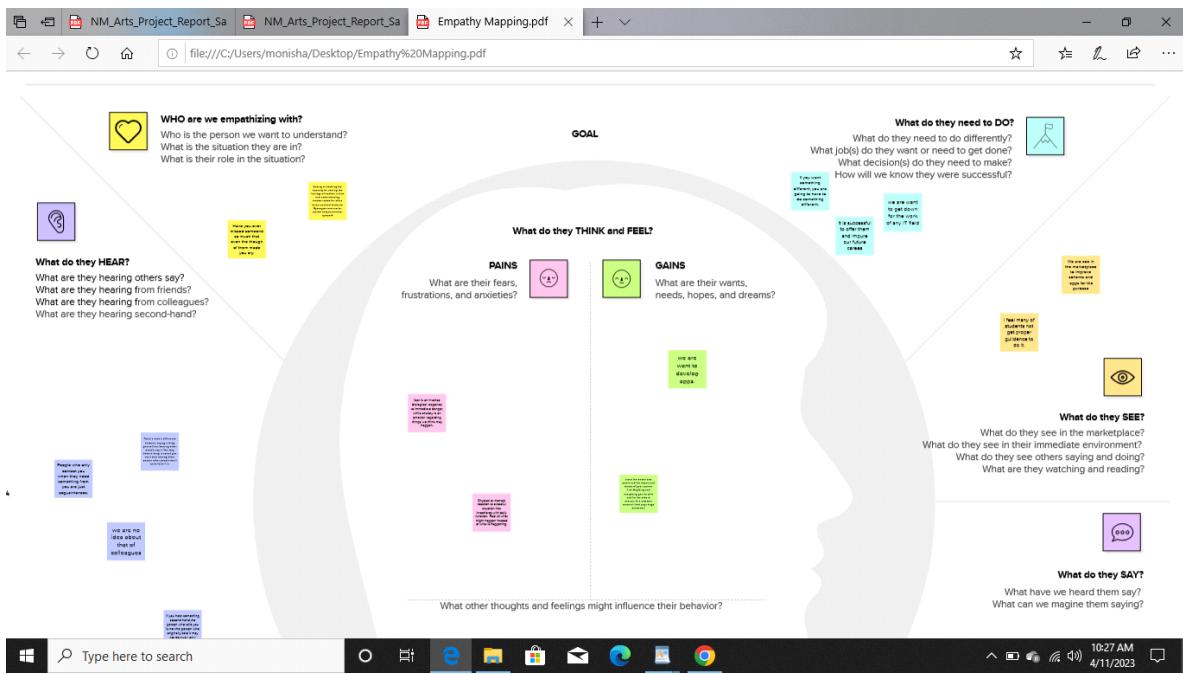
Customer relationship management (CRM) is a set of integrated, data-driven software solutions that help manage, track, and store information related to your company's current and potential customers.

1.2 Purpose

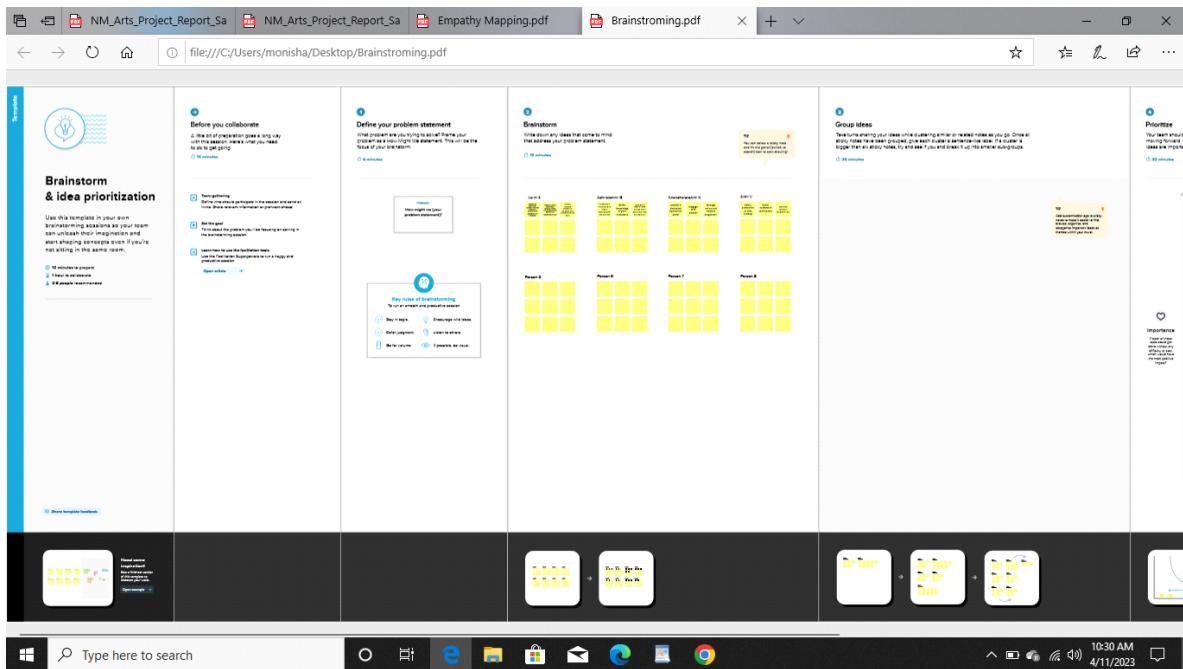
CRM software lets you store customer and prospect contact information, identify sales opportunities, record service issues, and manage marketing campaigns, all in one central location — and make information about every customer interaction available to anyone at your company who might need it.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



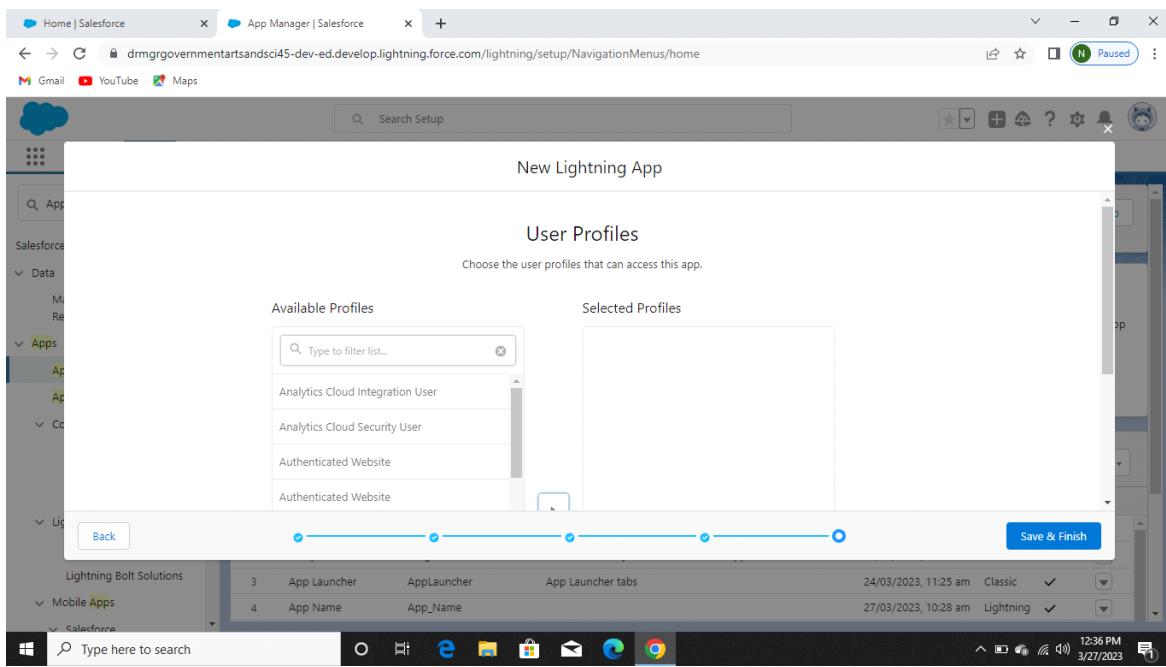
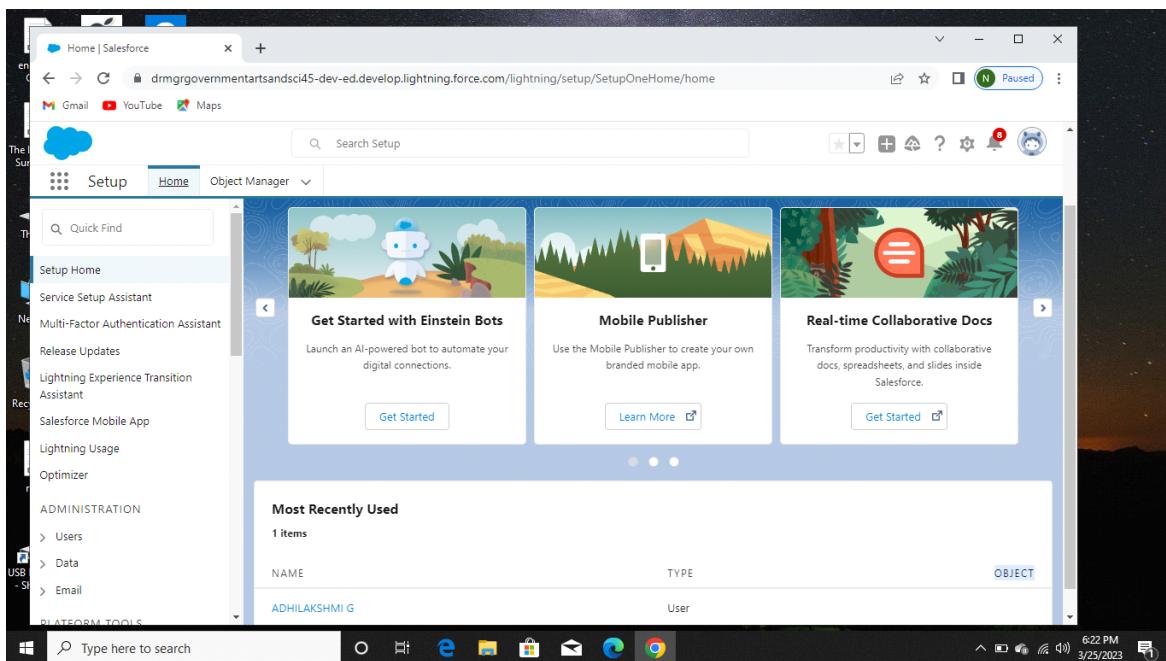
3. RESULT

3.1 Data Model:

.1 Data Model:

Object name	Fields in the Object	
Object 1	Field label	Data Type
	Address	Text Area
	Phone number	Phone
	Number of student	Roll-up summary
	Highest Marks	Roll-up summary
Object 2	Field label	Data Type
	Phone number	Phone
	School	Master-Detail relationship
	Class	Number
Object 3	Field label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot



New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Selected Profiles

Save & Finish

Back

3 App Launcher AppLauncher App Launcher tabs 24/03/2023, 11:25 am Classic

4 App Name App_Name 27/03/2023, 10:28 am Lightning

AdhilakshmiG / A-CRM-Application-For-Schools-Colleges Public

Code Issues Pull requests Actions Projects Wiki Security Insights Settings

main 1 branch 0 tags Go to file Add file <> Code About

No description, website, or topics provided.

0 stars 1 watching 0 forks

Releases

No releases published Create a new release

Packages

No packages published Publish your first package

Type here to search

Home | Salesforce Parent | Salesforce

dmrgovernmentartsandsci45-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003RUH2/Details/view

Gmail YouTube Maps

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

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

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Type here to search

11:04 AM 3/27/2023

Home | Salesforce Students | Salesforce

dmrgovernmentartsandsci45-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003RUGE/Details/view

Gmail YouTube Maps

Setup Home Object Manager

SETUP > OBJECT MANAGER Students

Details

Description

API Name Students_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

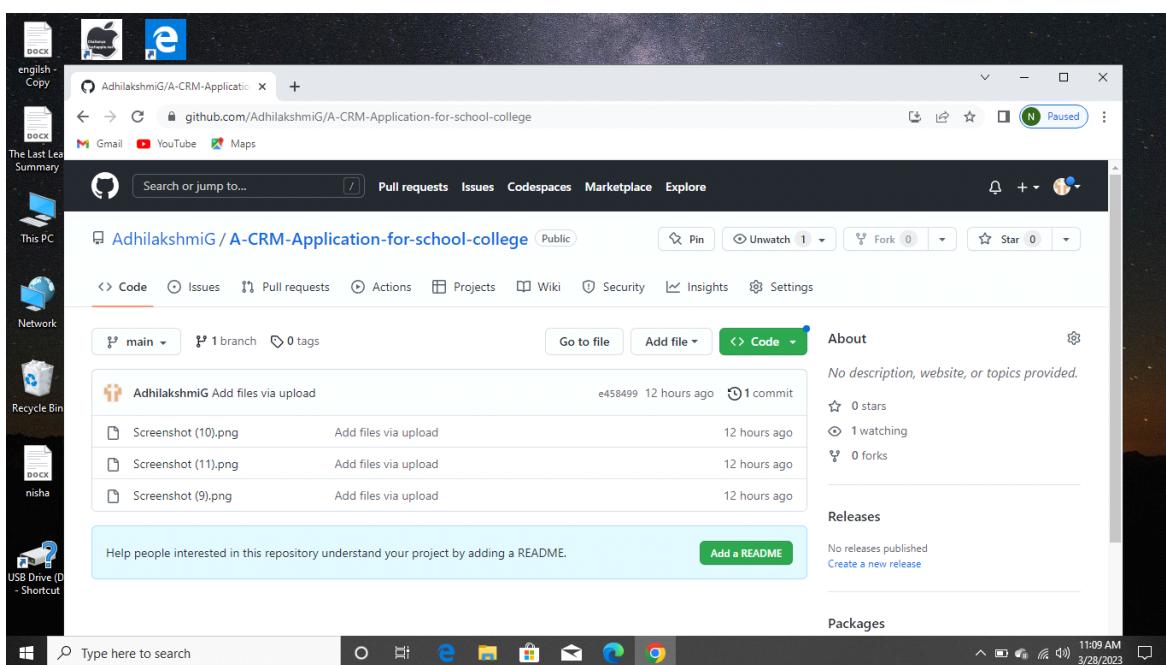
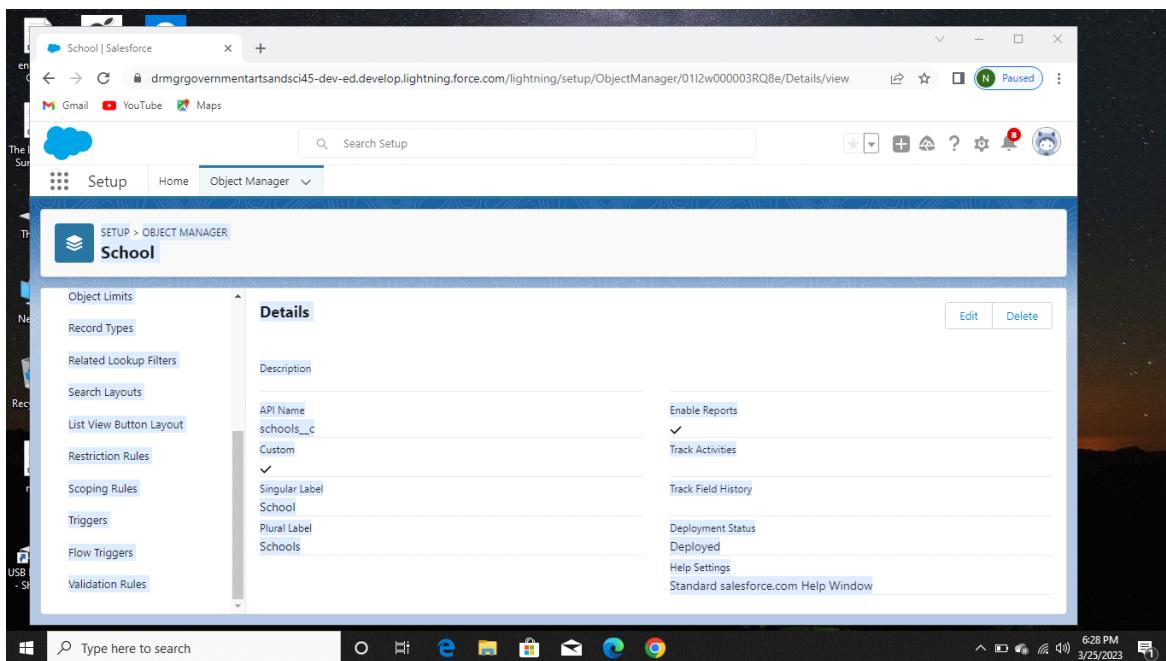
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Type here to search

11:03 AM 3/27/2023

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main area displays the 'Details' section for the 'College' object. The 'Fields & Relationships' sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section includes fields for API Name ('College__c'), Singular Label ('College'), Plural Label ('Colleges'), and other settings such as Enable Reports, Track Activities, and Deployment Status ('Deployed').

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The sidebar shows the 'User Interface' section with 'Tabs' highlighted. The main area displays the 'Custom Tabs' section, which allows creating new custom tabs. It includes sections for 'Custom Object Tabs' (listing tabs for 'Colleges', 'Parents', and 'Students' with icons like 'Computer', 'Star', and 'Chalkboard') and 'Web Tabs' (which are currently empty). A note at the bottom explains the different types of tabs available.



Home | Salesforce x App Manager | Salesforce x +

dmrgovernmentartsandsci45-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Gmail YouTube Maps

Cloud Setup Home Object Manager

Quick Find Search Setup

SETUP 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 Disabled

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

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↴	Vi... ↴
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	24/03/2023, 11:25 am	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/03/2023, 11:25 am	Classic ✓	▼
3 App Launcher	AppLauncher	App Launcher tabs	24/03/2023, 11:25 am	Classic ✓	▼
4 App Name	App_Name		27/03/2023, 10:28 am	Lightning ✓	▼

1:07 PM 3/27/2023

Type here to search

Home | Salesforce x App Manager | Salesforce x +

dmrgovernmentartsandsci45-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Gmail YouTube Maps

Cloud Setup Home Object Manager

Quick Find Search Setup

SETUP Lightning Experience App Manager

Enable App Cloning Disabled

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App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↴	Vi... ↴
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	24/03/2023, 11:25 am	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/03/2023, 11:25 am	Classic ✓	▼
3 App Launcher	AppLauncher	App Launcher tabs	24/03/2023, 11:25 am	Classic ✓	▼
4 App Name	App_Name		27/03/2023, 10:28 am	Lightning ✓	▼
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ...	24/03/2023, 11:28 am	Lightning ✓	▼
6 College Managem...	Student		27/03/2023, 11:51 am	Lightning ✓	▼
7 College Managem...	College_Management		27/03/2023, 12:31 pm	Lightning ✓	▼
8 Community	Community	Salesforce CRM Communities	24/03/2023, 11:25 am	Classic ✓	▼
9 Content	Content	Salesforce CRM Content	24/03/2023, 11:25 am	Classic ✓	▼

Show all

sm.jpg smjfif school Management.jiff

Type here to search

Home | Salesforce App Manager | Salesforce

drmgrgovtartsandsci45-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

Gmail YouTube Maps

New Lightning App

Available Profiles Selected Profiles

Type to filter list... Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile

No Profiles selected

Back Save & Finish

Lightning Bolt Solutions

Mobile Apps

Salesforce

Type here to search

12:36 PM 3/27/2023

Student | Salesforce

drmgrgovtatssciencecollege-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003oTVo/FieldsAndRelationships/view

Gmail YouTube Maps

Setup > OBJECT MANAGER Student

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

Fields & Relationships

8 Items, Sorted by Field Label

Created By	CreatedById	Lookup(User)
enter Class	enter_Class_c	Number(18, 0)
enter Phone Number	enter_Phone_Number_c	Phone
enter Results	enter_Results_c	Picklist
enter School	enter_School_c	Master-Detail(School)
Last Modified By	LastModifiedById	Lookup(User)
Student	Student__c	Text Area(255)
Student Name	Name	Text(80)

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Type here to search

11:03 28-03-2023

School | Salesforce

drmgrgovtatrssciencecollege-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000003oTVZ/FieldsAndRelationships/view

Gmail YouTube Maps

Setup Home Object Manager

SETUP > OBJECT MANAGER School

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
enter Address	enter_Address__c	Text Area(255)		
enter Phone Number	enter_Phone_Number__c	Phone		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
School Name	Name	Text(80)		

Type here to search

11:01 28-03-2023

Parent | Salesforce

drmgrgovtatrssciencecollege-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000003oTxf/FieldsAndRelationships/view

Gmail YouTube Maps

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
enter Parent Address	enter_Parent_Address__c	Text Area(255)		
enter Parent Number	enter_Parent_Number__c	Phone		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Parent Name	Name	Text(80)		

Type here to search

11:01 28-03-2023

The screenshot shows a GitHub repository page for 'aarthi2712 / A-CRM-Application-For-School'. The repository is public and contains one branch ('main') and no tags. The last commit, made 15 hours ago, is titled 'Add files via upload' and includes two screenshots. The repository has 0 stars, 1 watching, and 0 forks. It also has no releases or packages published.

Code | **Issues** | **Pull requests** | **Actions** | **Projects** | **Wiki** | **Security** | **Insights** | **Settings**

About
No description, website, or topics provided.
0 stars
1 watching
0 forks

Releases
No releases published
Create a new release

Packages
No packages published
Publish your first package

The screenshot shows a GitHub repository page for 'aarthi2712 / A-CRM-Application-For-School-College'. The repository is public and contains one branch ('main') and no tags. The last commit, made 15 hours ago, is titled 'Add files via upload' and includes five screenshots. The repository has 0 stars, 1 watching, and 0 forks. It also has no releases or packages published.

Code | **Issues** | **Pull requests** | **Actions** | **Projects** | **Wiki** | **Security** | **Insights** | **Settings**

About
No description, website, or topics provided.
0 stars
1 watching
0 forks

Releases
No releases published
Create a new release

Packages
No packages published
Publish your first package

Home | Salesforce x Profiles | Salesforce x +

dmrgrgovatrssciencecollege-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3Ffcf%3D00B2w00000fStUb%26rolodexInd... ↗ ☆ ☐ A ⋮

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

Profiles

SETUP Profiles

Profiles

All Profiles Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	School Profile	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-7 of 7 0 Selected Page [1] of 1

Type here to search 11:52 28-03-2023

Home | Salesforce x Profiles | Salesforce x +

dmrgrgovatrssciencecollege-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e%3Ffcf%3D00B2w00000fStUb%26rolodexInd... ↗ ☆ ☐ A ⋮

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

Profiles

SETUP Profiles

Administrative Permissions

API Enabled	<input checked="" type="checkbox"/>
API Only User	<input checked="" type="checkbox"/>

Chatter Internal User

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

Basic Access Data Administration

Read	Create	Edit	Delete	View All	Modify All
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Basic Access Data Administration

Read	Create	Edit	Delete	View All	Modify All
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Custom Object Permissions

Basic Access Data Administration

Read	Create	Edit	Delete	View All	Modify All
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Parents

Roll-up Summary

Basic Access Data Administration

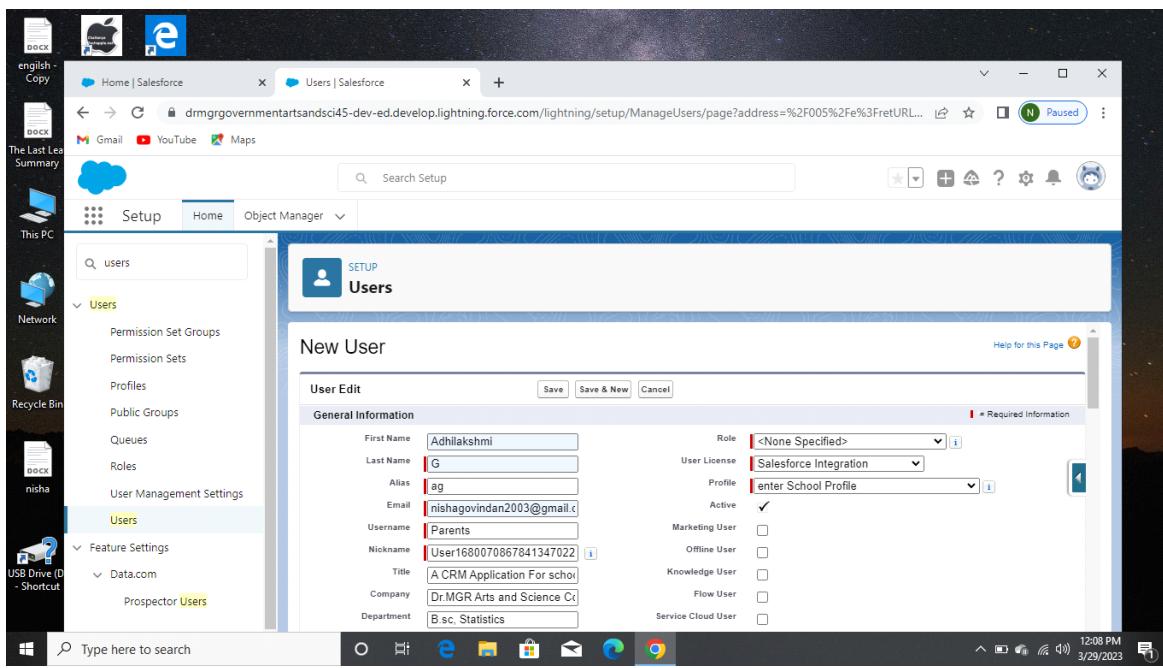
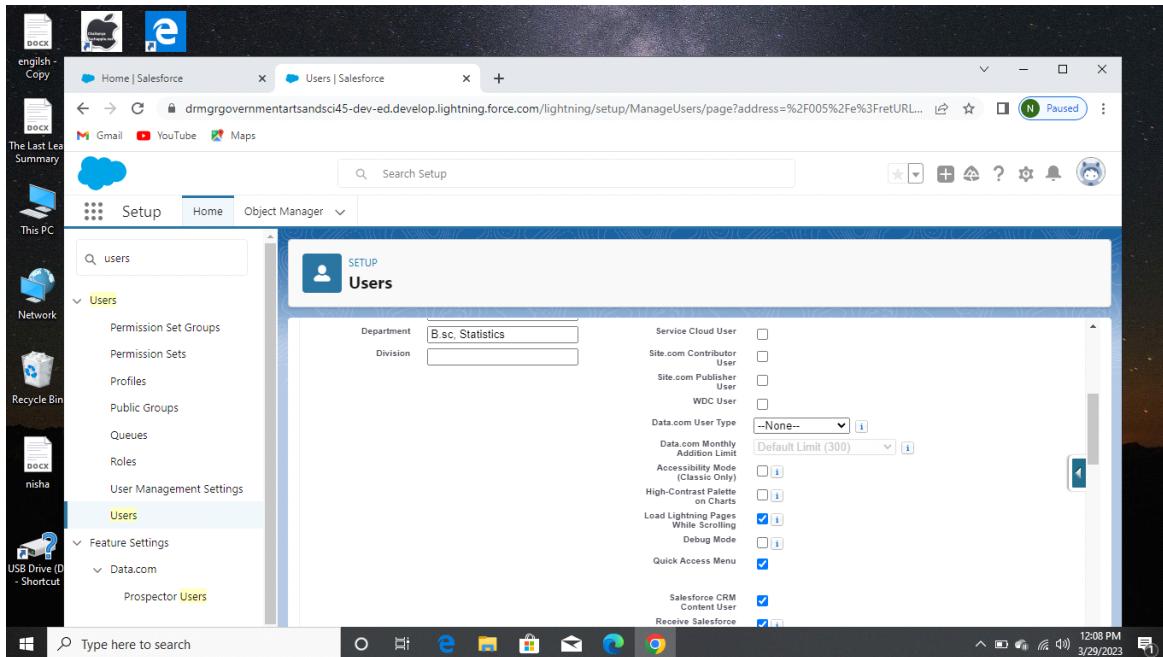
Read	Create	Edit	Delete	View All	Modify All
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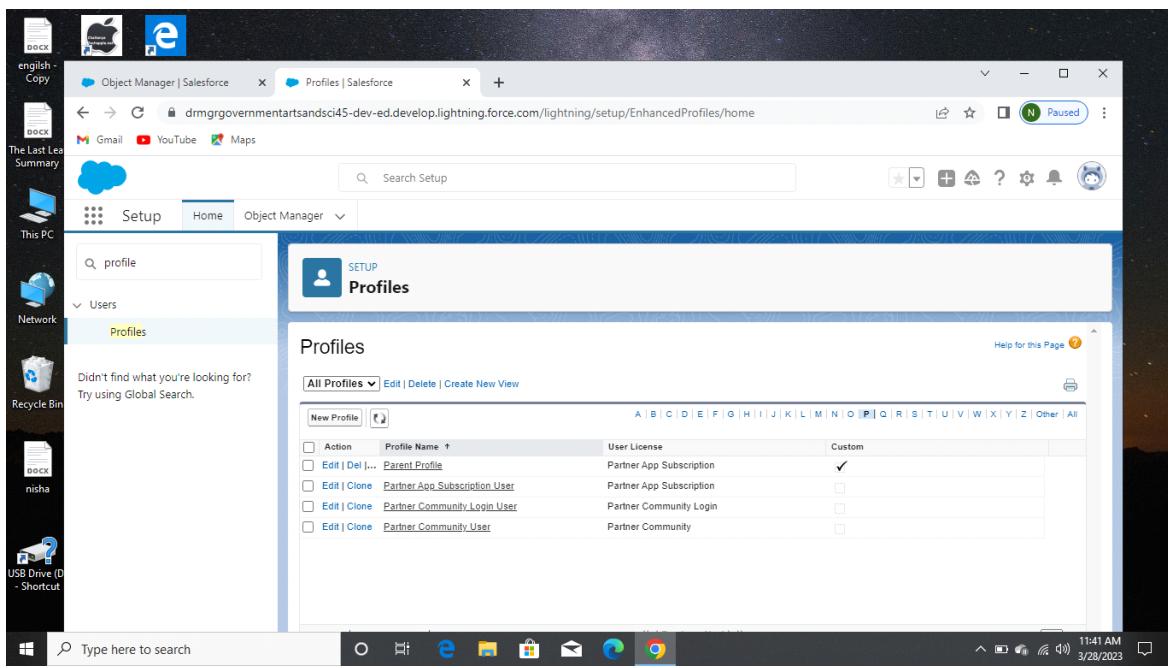
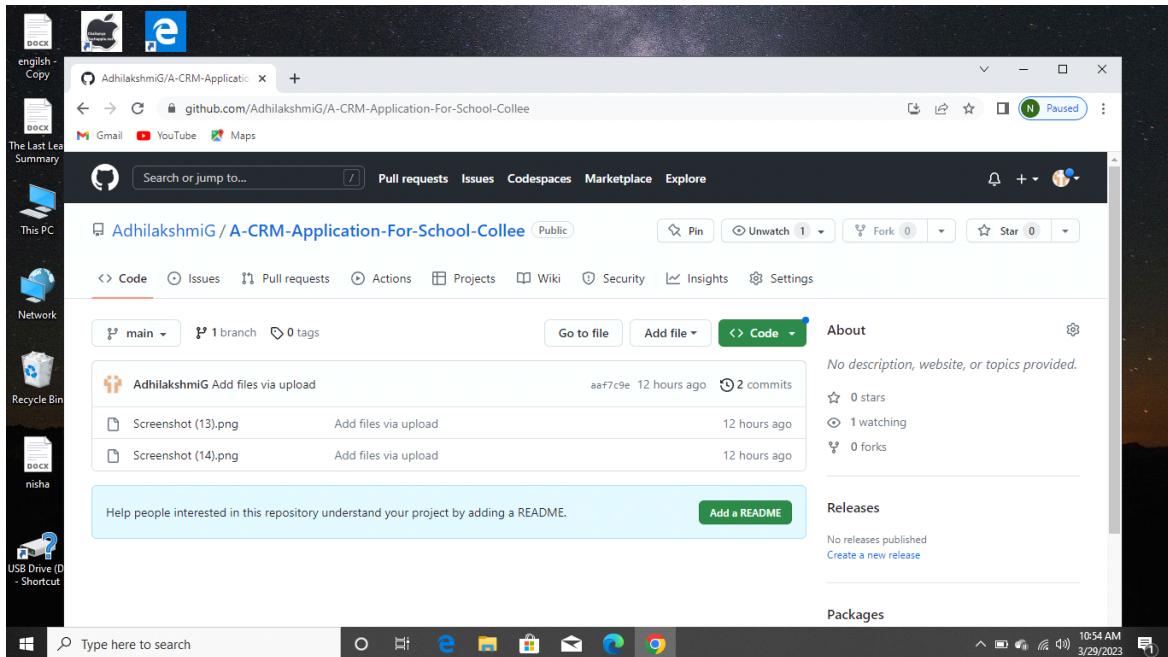
Schools

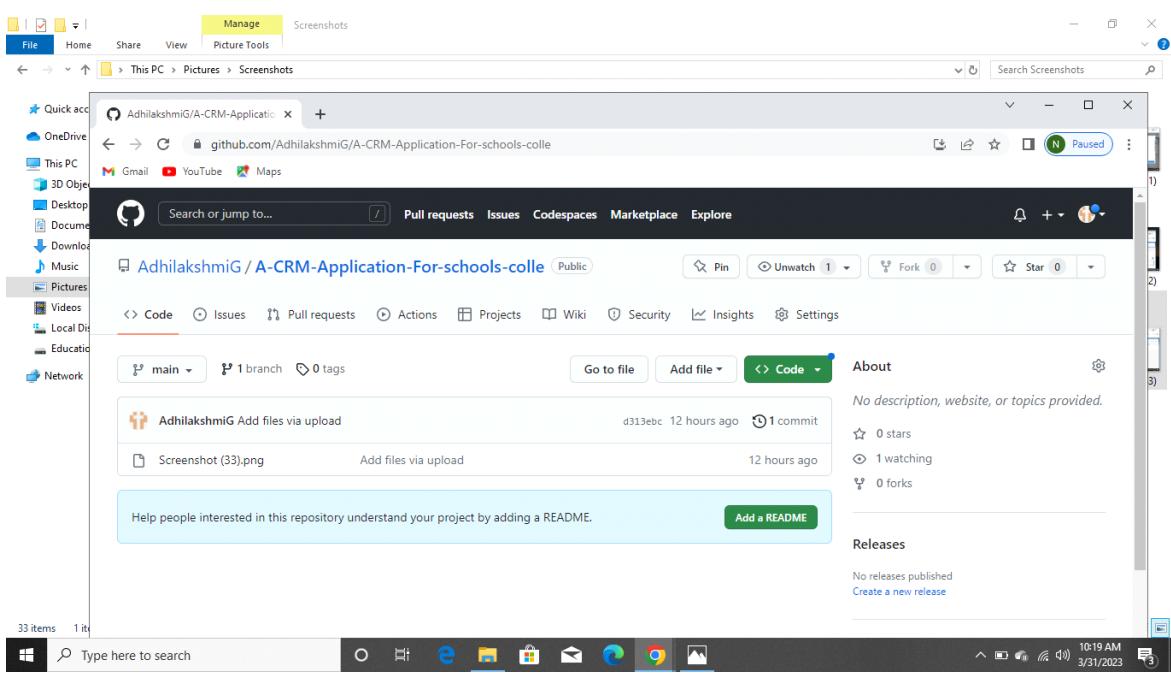
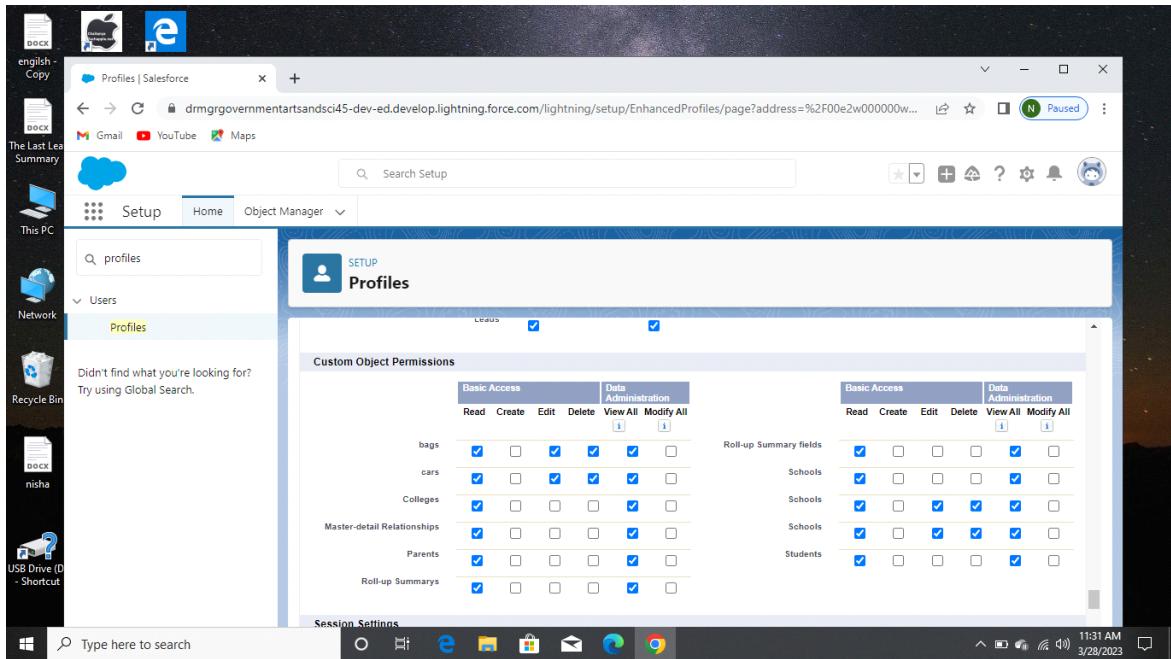
Students

Session Settings

Type here to search 11:53 28-03-2023







The screenshot shows a web browser window with two tabs open: "Home | Salesforce" and "Reports | Salesforce". The URL in the address bar is drmgrgovernmentartsandsci45-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru. The page displays a list of reports under the "Recent" section. The columns include Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are "New Parents Report" (Private Reports, ADHILAKSHMI G, 31/3/2023, 10:09 am) and "New schools with students Report" (Private Reports, ADHILAKSHMI G, 31/3/2023, 10:07 am). The sidebar on the left shows categories like REPORTS, FOLDERS, and FAVORITES. The system tray at the bottom right shows the date as 3/31/2023 and the time as 10:15 AM.

The screenshot shows a web browser window with one tab open: "AdhilakshmiG/A-CRM-Application-For-school-colle" on GitHub. The URL in the address bar is github.com/AdhilakshmiG/A-CRM-Application-For-school-colle. The page displays the repository's code, issues, pull requests, actions, projects, wiki, security, insights, and settings. The code tab is selected, showing a main branch with 1 branch and 0 tags. The commit history shows two commits from AdhilakshmiG: "Add files via upload" (1a0a512, 12 hours ago) and "Screenshot (29).png" (Add files via upload, 12 hours ago). The repository has 0 stars, 1 watching, and 0 forks. The sidebar on the left shows local file icons like DOCX, PDF, and Microsoft Word. The system tray at the bottom right shows the date as 3/30/2023 and the time as 12:21 PM.

Home | Salesforce Permission Sets | Salesforce

dmrgovernmentartsandsci45-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS2w000009Opaz/PermissionSetAssignment/home

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

(permission sets)

Users

Permission Sets

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

Teacher permission

Current Assignments

Full Name	Active	Role	Profile	User License	Expires On
Adhilakshmi G	✓		Standard Platform User	Salesforce Platform	
Adhilakshmi G	✓		Custom: Sales Profile	Salesforce	
Adhilakshmi G	✓		Enter School Profile	Salesforce Integration	
ADHILAKSHMI G	✓		System Administrator	Salesforce	

Add Assignment

12:17 PM 3/30/2023

Home | Salesforce Permission Sets | Salesforce

dmrgovernmentartsandsci45-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOjzXR1cF9wbGF0Zm9ybV9wZXJtczpwc2FSZXN1bH...

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

(permission sets)

Users

Permission Sets

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

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
ADHILAKSHMI G	Salesforce			Success
Adhilakshmi G	Salesforce			Success
Adhilakshmi G	Salesforce Integration			Success
Adhilakshmi G	Salesforce Platform			Success

12:15 PM 3/30/2023

Home | Salesforce Permission Sets | Salesforce

dmrgovernmentartsandsci45-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS2w000009OxLb/PermissionSetAssignment/home

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

Users

Permission Sets

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

principal permission

Current Assignments

Full Name	Active	Role	Profile	User License	Expires On
Adhilakshmi G	✓		Standard Platform User	Salesforce Platform	
Adhilakshmi G	✓		Custom: Sales Profile	Salesforce	
Adhilakshmi G	✓		enter School Profile	Salesforce Integration	
ADHILAKSHMI G	✓		System Administrator	Salesforce	

12:11 PM 3/30/2023

Home | Salesforce Permission Sets | Salesforce

dmrgovernmentartsandsci45-dev-ed.lightning.force.com/lightning/setup/PermSets/0PS2w000009OxLZ/PermissionSetAssignment/home

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

Users

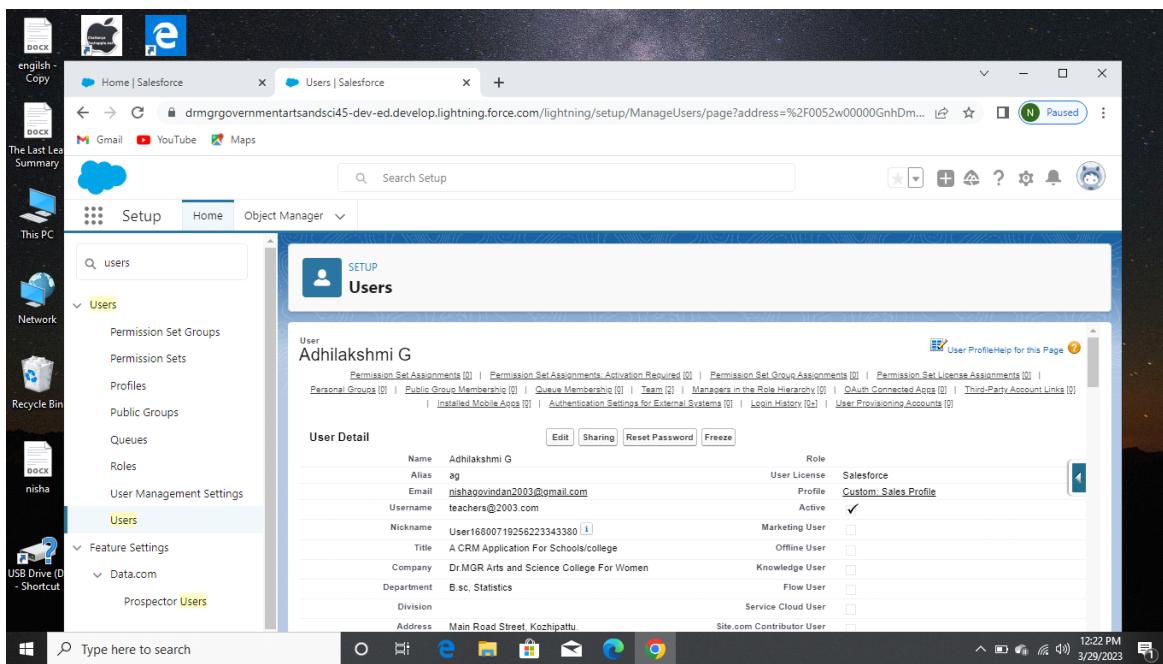
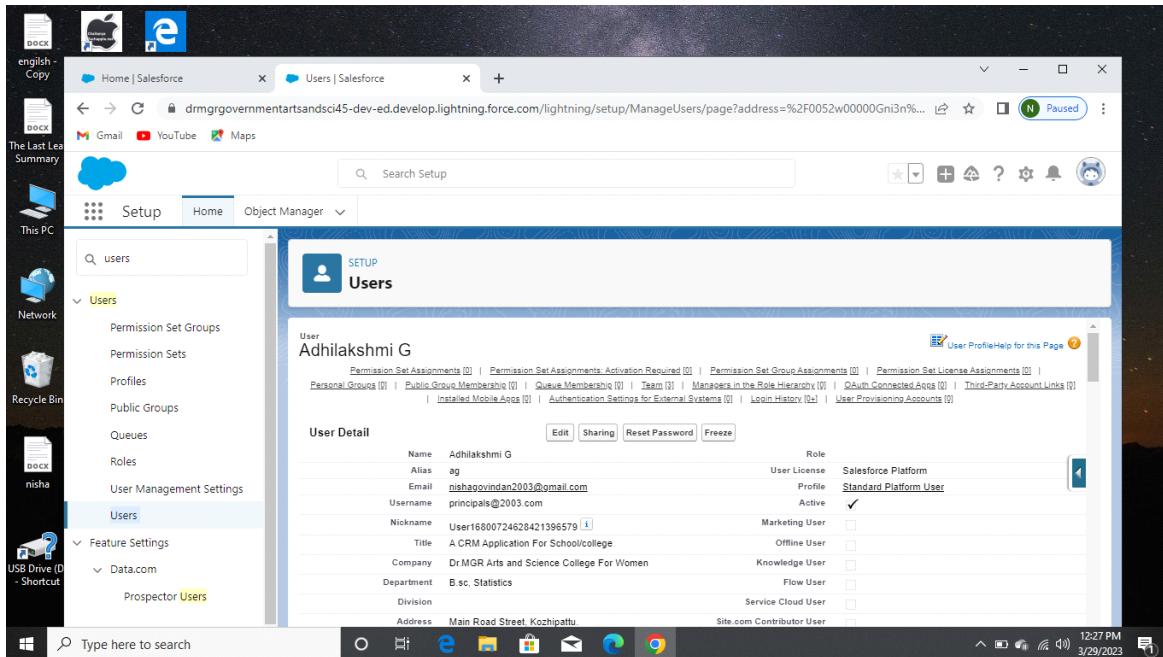
Permission Sets

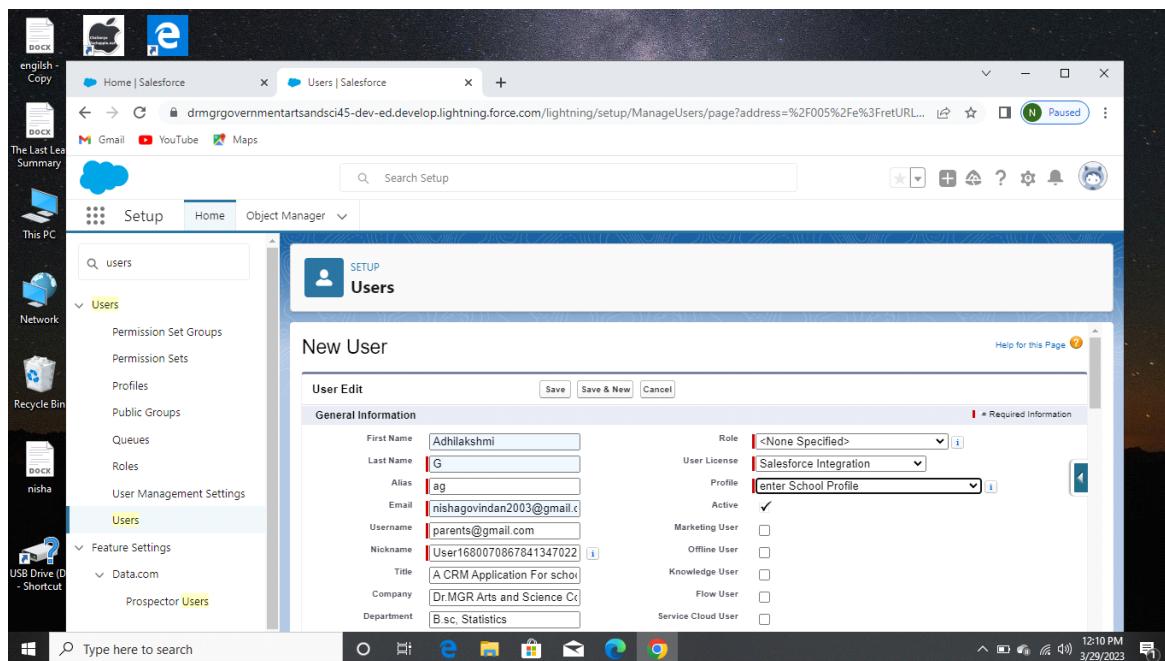
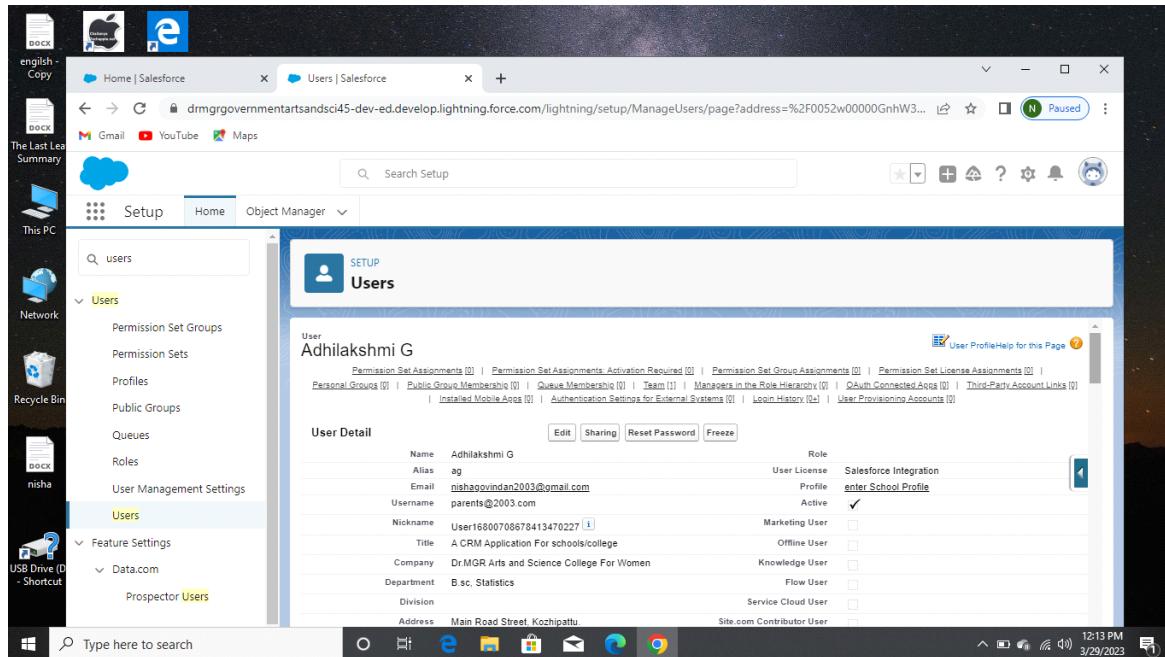
Didn't find what you're looking for? Try using Global Search.

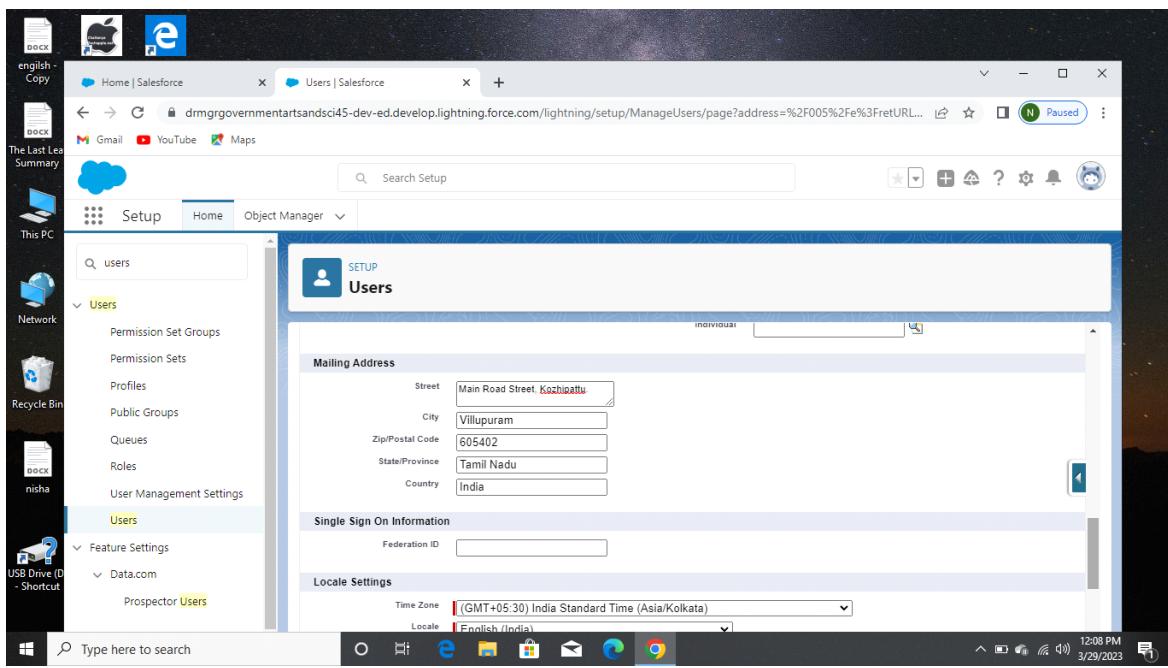
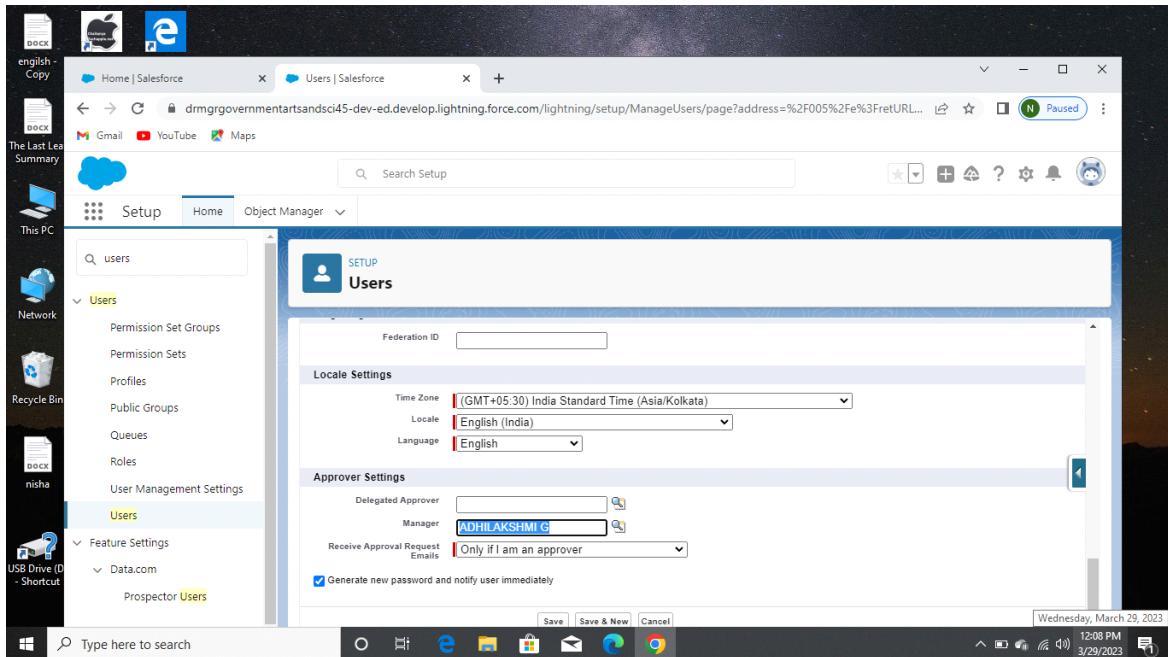
Selected Users

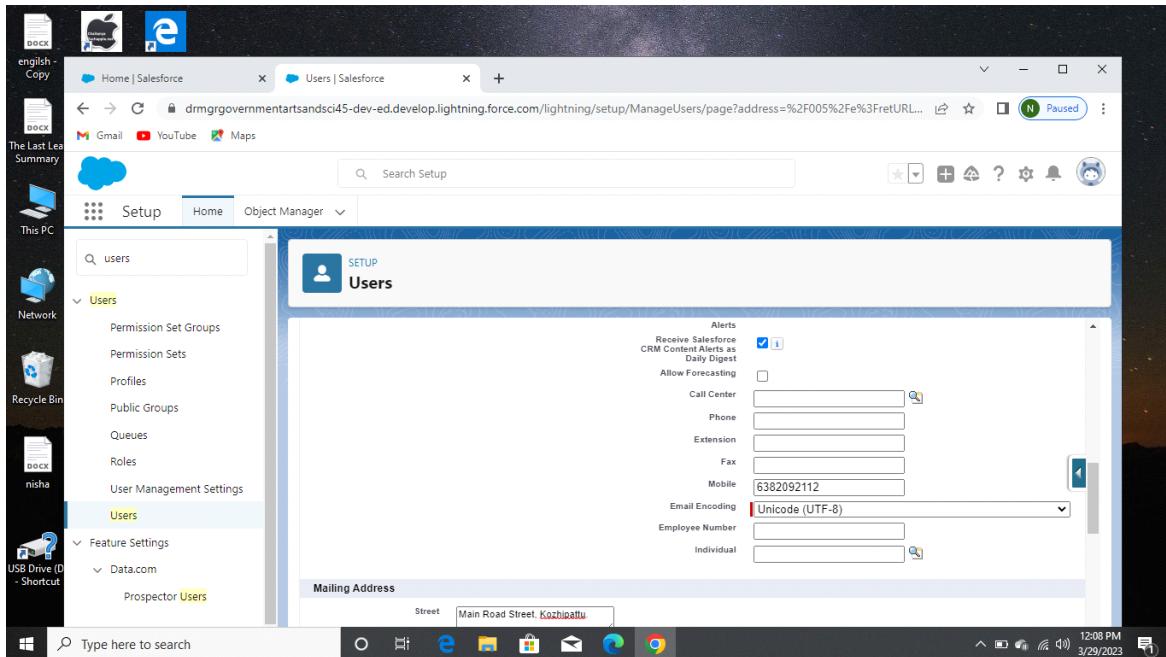
Full Name	Role	Profile	Active	User License	Expires On
ADHILAKSHMI G		System Administrator	✓	Salesforce	Never Expires
Adhilakshmi G		Custom: Sales Profile	✓	Salesforce	Never Expires
Adhilakshmi G		enter School Profile	✓	Salesforce Integration	Never Expires
Adhilakshmi G		Standard Platform User	✓	Salesforce Platform	Never Expires

12:08 PM 3/30/2023









4. Tralihead Profile Public URL

Team Lead-<https://trailblazer.me/id/hgahlot3>

Team Leader- <https://trailblazer.me/id/aarts27>

Team Member 1-<https://trailblazer.me/id/adhig3>

Team Member 2-Anandhalakshmi K

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

5. ADVATAGES & DISADTAGES

5.1 ADVATAGES

- Trustworthy reporting.**
- Dashboards that visually showcase data.**
- Improved messaging with automation.**
- Proactive service.**
- Efficiency enhanced by automation.**
- Simplified collaboration.**

5.2 DISADVATAGES

- software subscription or purchase fees.
- premium upgrades, eg add-on marketing or reporting features.
- customisation.
- IT resources needed.
- hardware or software requirements.
- staff training and upskilling.

6. APPLICATION

- **Application 1: Tracking Customers.**
- **Application 2: Collecting Data for Marketing.**
- **Application 3: Improving Interactions and Communications.**
- **Application 4: Streamlining Internal Sales Processes.**

7. CONCLUSION

The goal of CRM is to bring together all of the company's relevant departments so they can work together to maintain customer relationships.

8. 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. Customers expect organizations to know a lot about them and expect to have conversations.