

A CRM Application For School or College

1. Introduction

1.1. Overview:

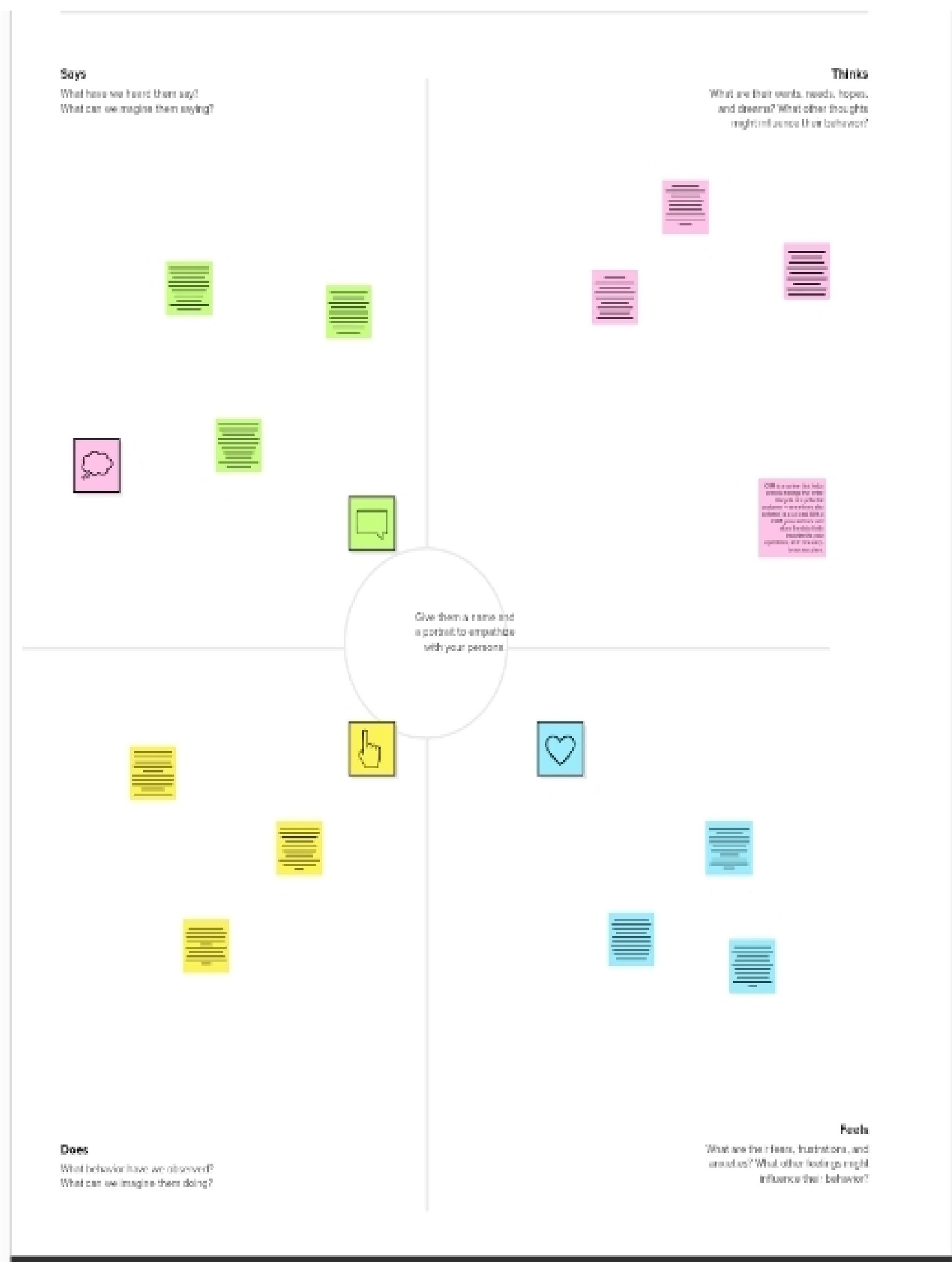
A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

1.2. Purpose:

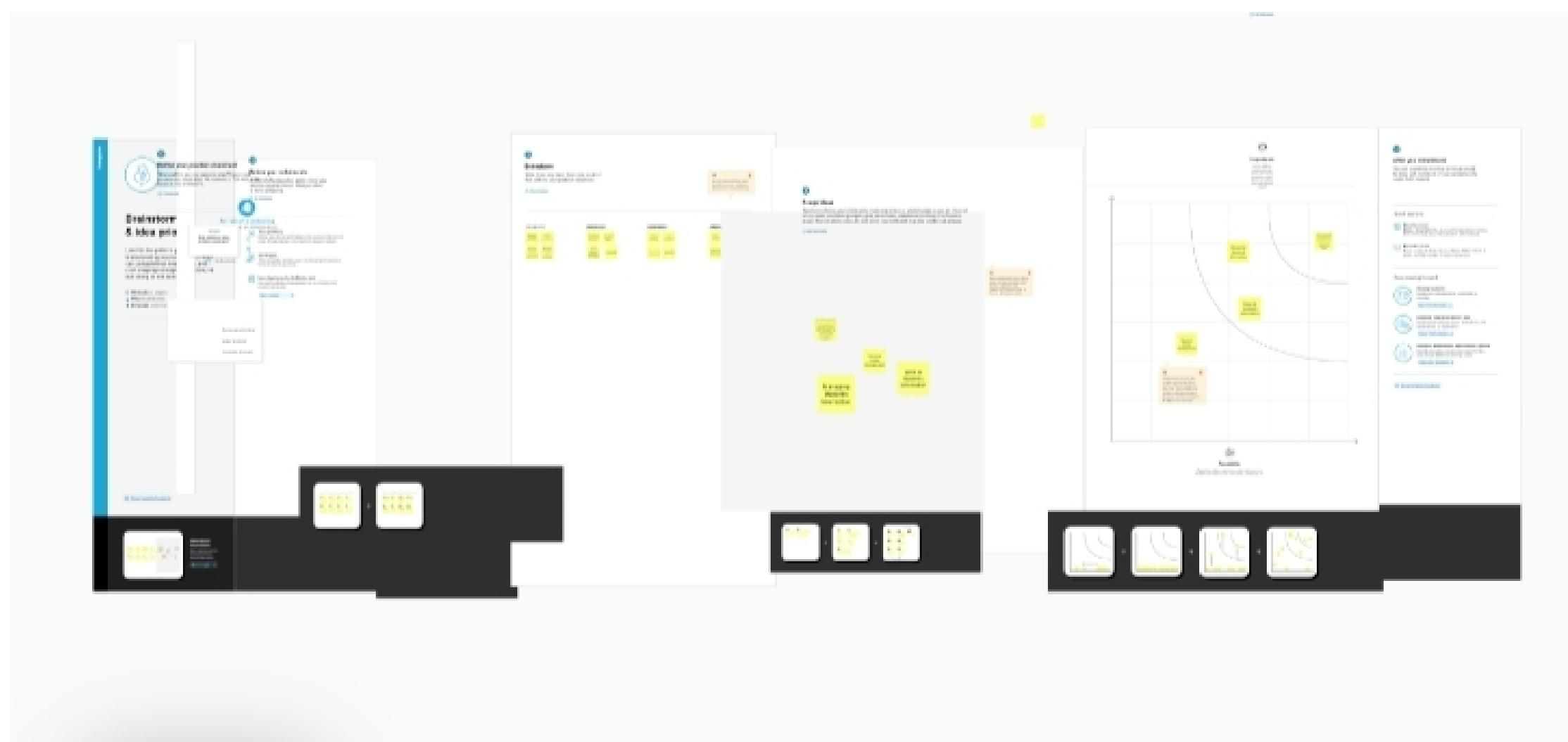
Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.

2. Problem Definition & Design Thinking

2.1. Empathy Map:



2.2. Ideation & Brainstorming Map:



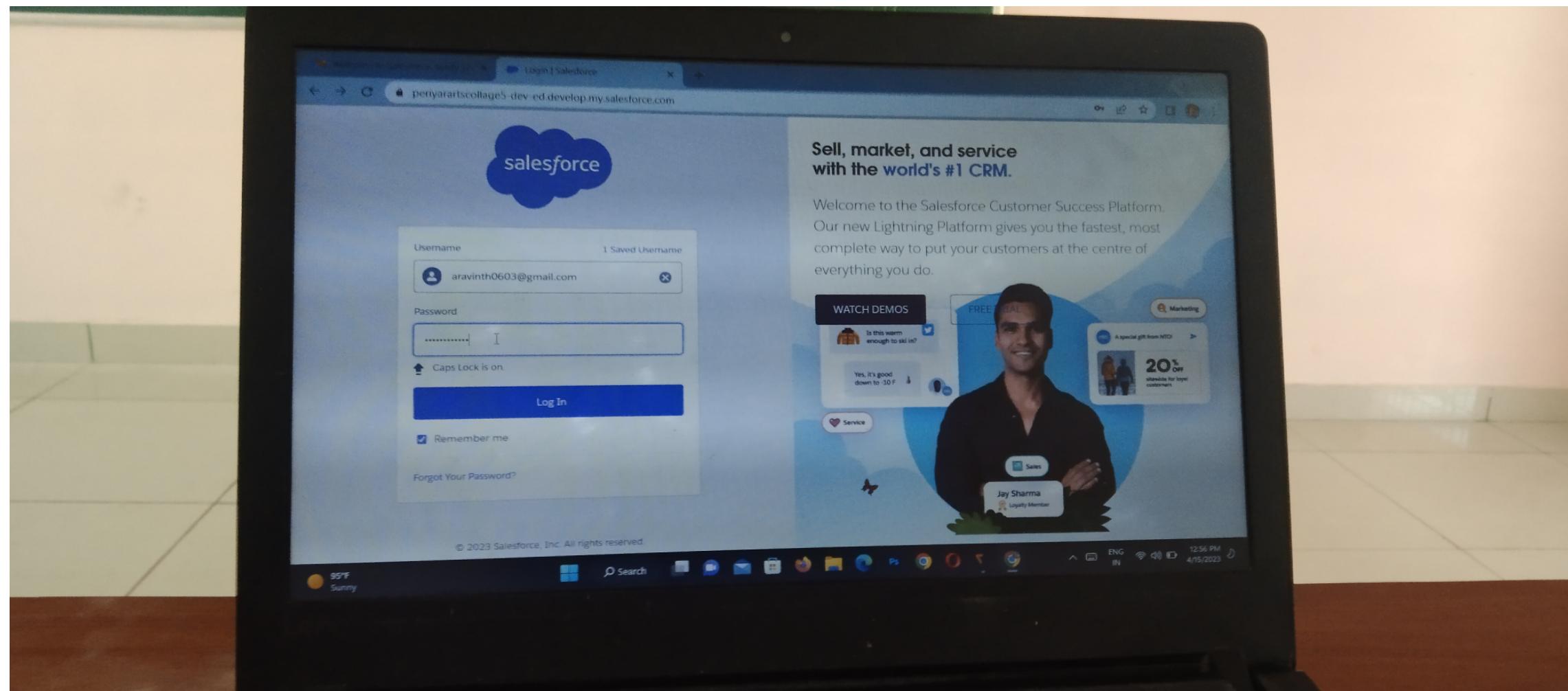
3. Result

3.1. Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
OBJECT 1	Field label	Data Type
	School	Root summary
	Student	Phone
OBJECT 2	Field label	Data Type
	Parent	Text Area

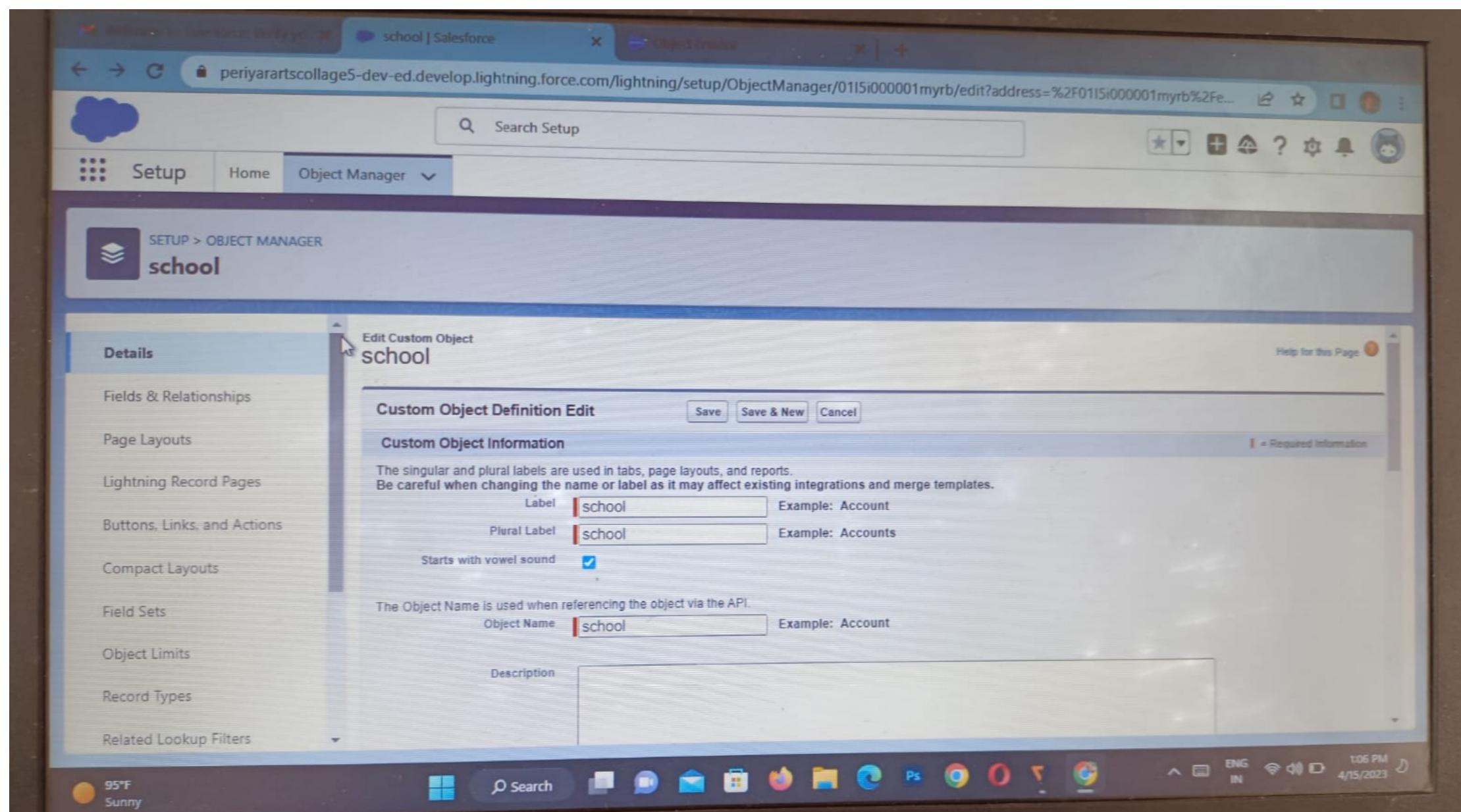
3.2. Activity And Screenshoot:

Milestone 1:Creating developer account

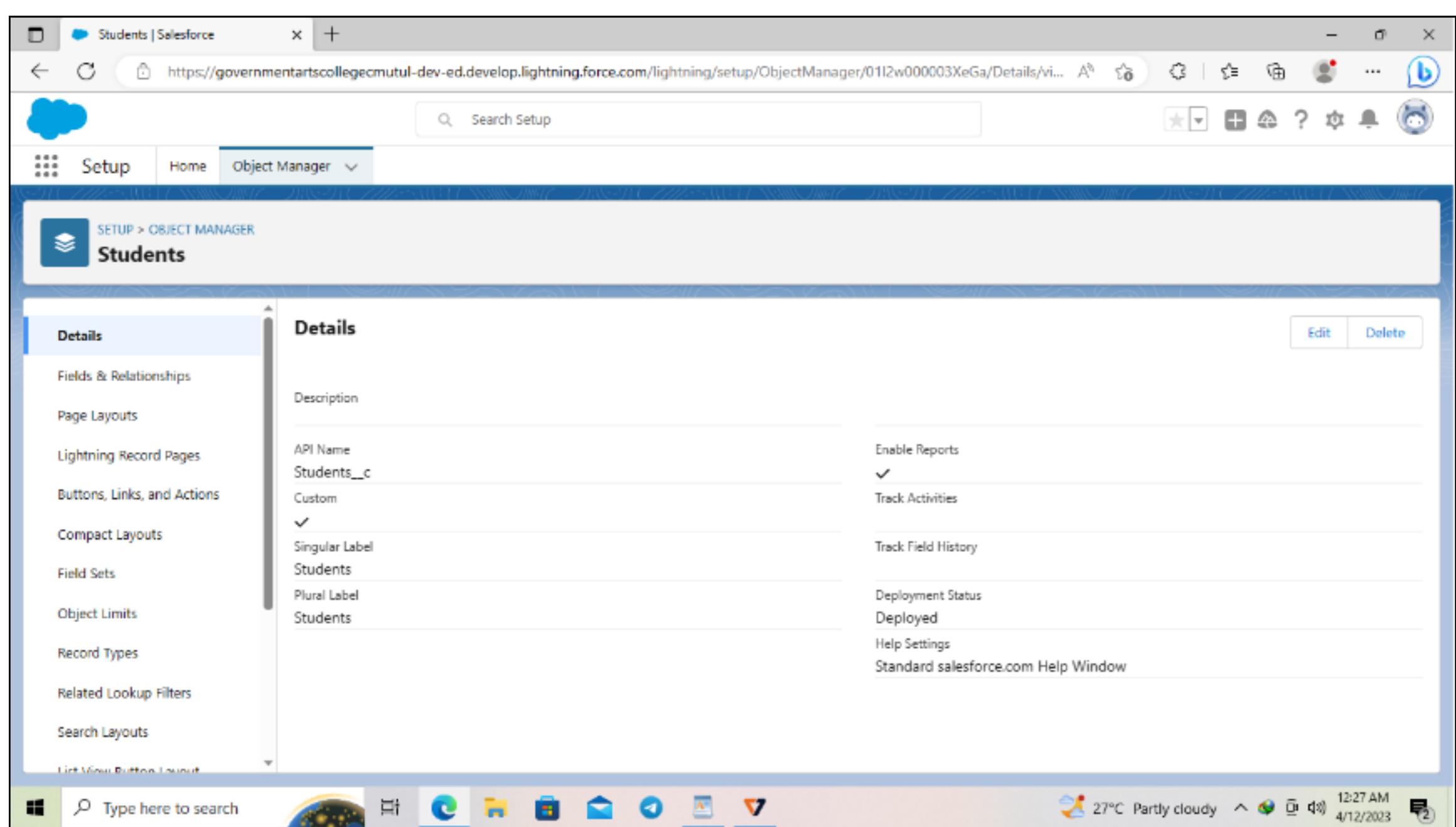
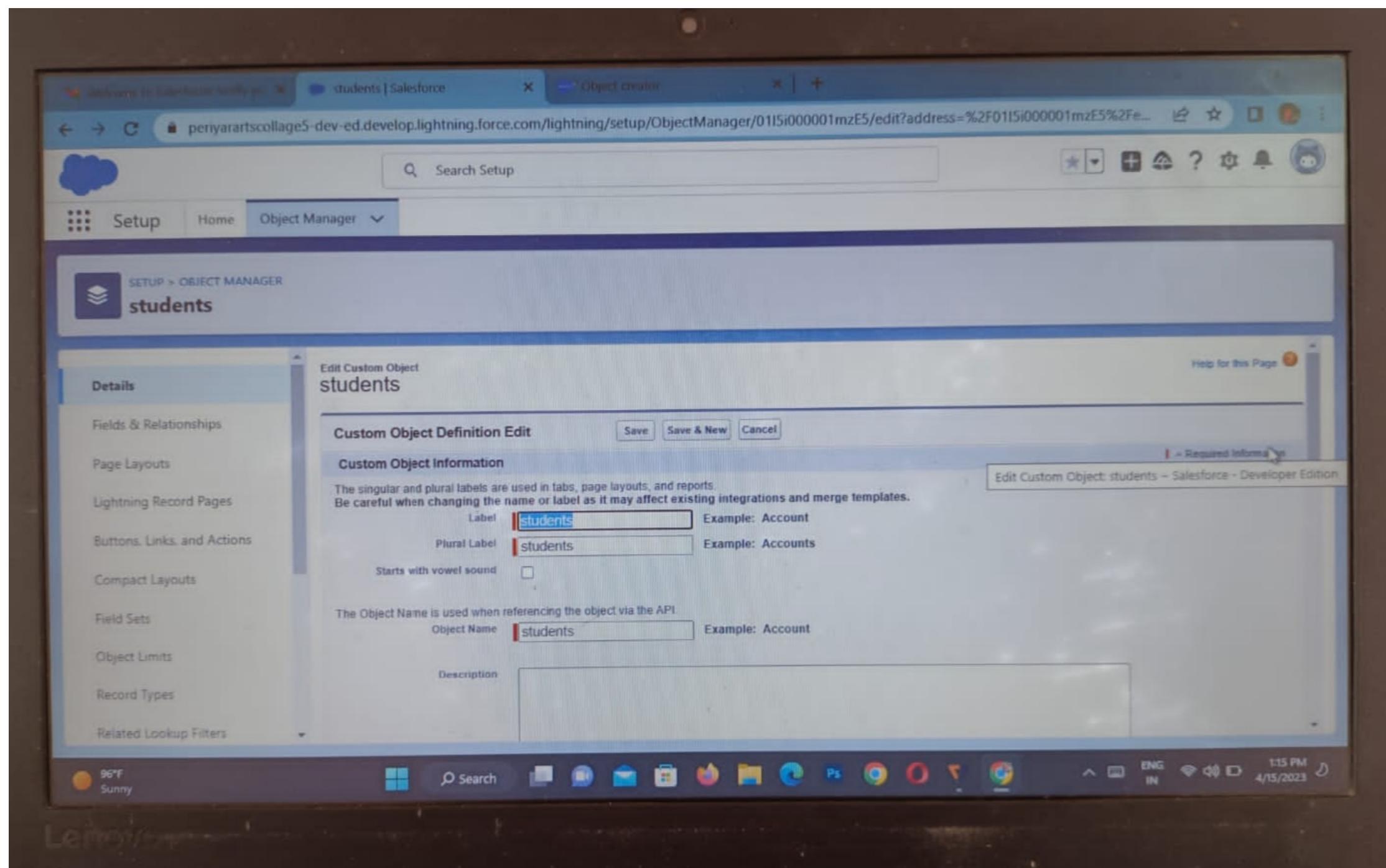


Milestone 2: Creating object

Activity 1:Create school object



Activity 2:Create student object



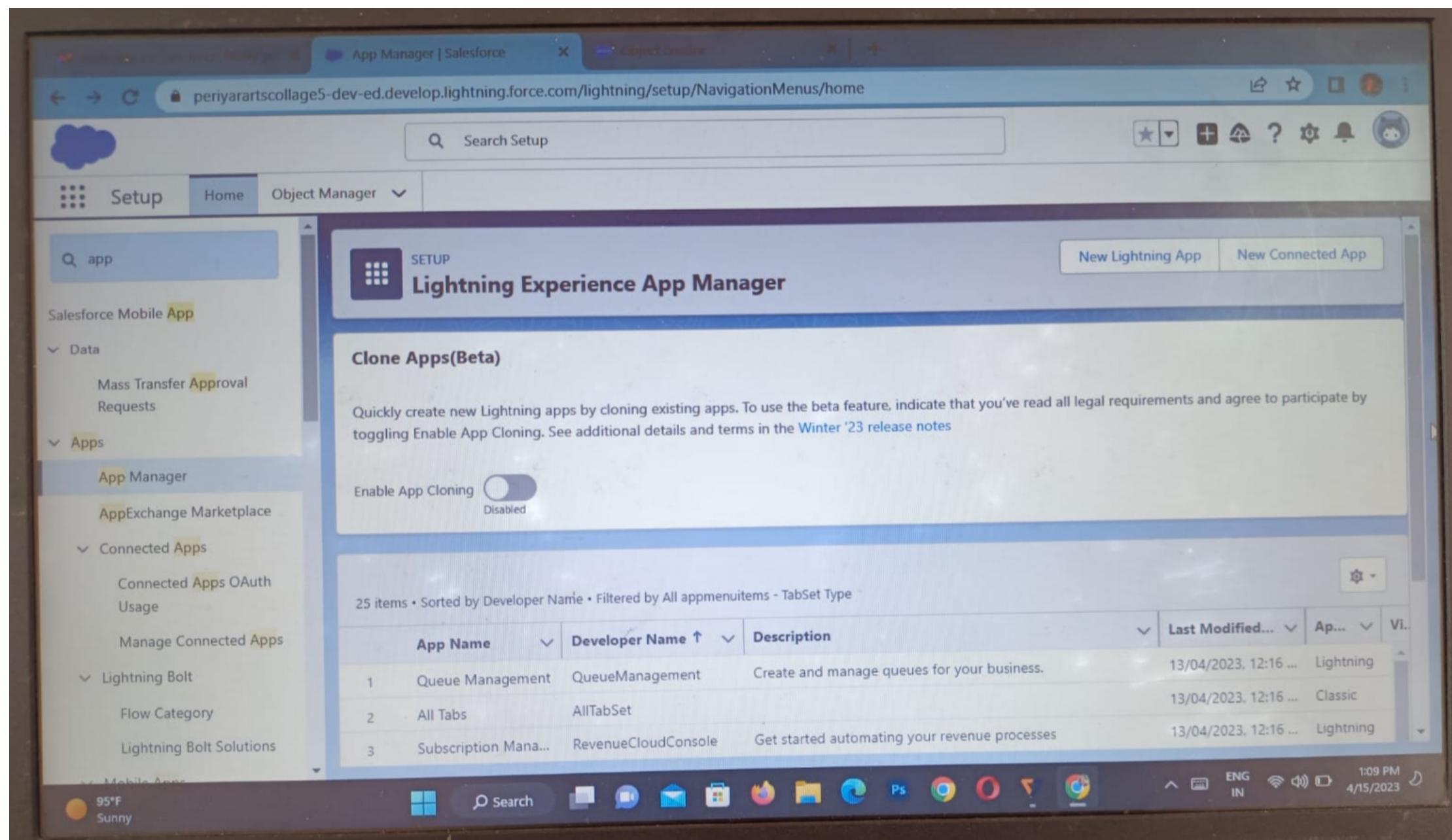
Activity 3: Create parent object

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various object configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main panel displays the 'Details' section for the 'Parent' object. The 'API Name' is set to 'Parent__c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'Parent' and the 'Plural Label' is 'Parents'. Under the 'Enable Reports' section, 'Track Activities' and 'Track Field History' are checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link points to 'Standard salesforce.com Help Window'. At the bottom right of the main panel are 'Edit' and 'Delete' buttons.

Milestone 3: Lighting App

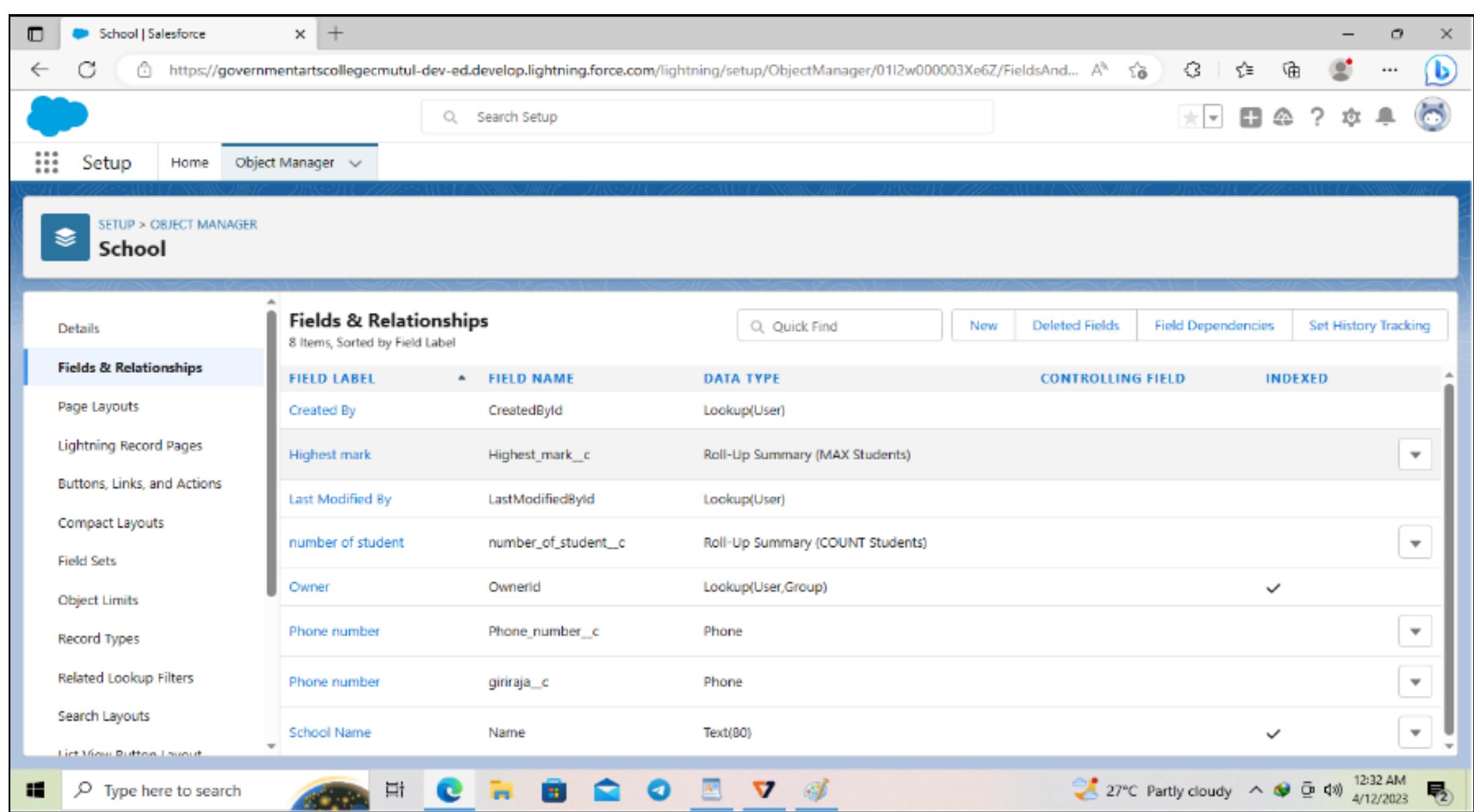
The screenshot shows the Lightning Experience App Manager. The left sidebar navigation includes: Salesforce Mobile App, Data (Mass Transfer Approval Requests), Apps (selected), App Manager (selected), AppExchange Marketplace, Connected Apps (Connected Apps OAuth Usage), Manage Connected Apps, Lightning Bolt (Flow Category, Lightning Bolt Solutions), Mobile Apps (selected), and Salesforce. The main content area is titled 'Lightning Experience App Manager' and 'Clone Apps(Beta)'. It explains the beta feature for cloning apps and provides a toggle switch for 'Enable App Cloning' which is set to 'Created'. Below this is a table listing 22 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The table columns are: App Name, Developer Name, Description, Last Modified, Ap..., and Vi... . The table rows include:

App Name	Developer Name	Description	Last Modified	Ap...	Vi...
All Tabs	AllTabSet		29/03/2023, 11:02 am	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	29/03/2023, 11:02 am	Classic	
App Launcher	AppLauncher	App Launcher tabs	29/03/2023, 11:02 am	Classic	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	29/03/2023, 11:04 am	Lightning	
Community	Community	Salesforce CRM Communities	29/03/2023, 11:02 am	Classic	



Milestone 4:Fields And Relationship

Activity 1:Create field for school object



Activity 2:Create field for student object

The screenshot shows the Salesforce Object Manager interface for the 'Students' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main area displays a table titled 'Fields & Relationships' with 16 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

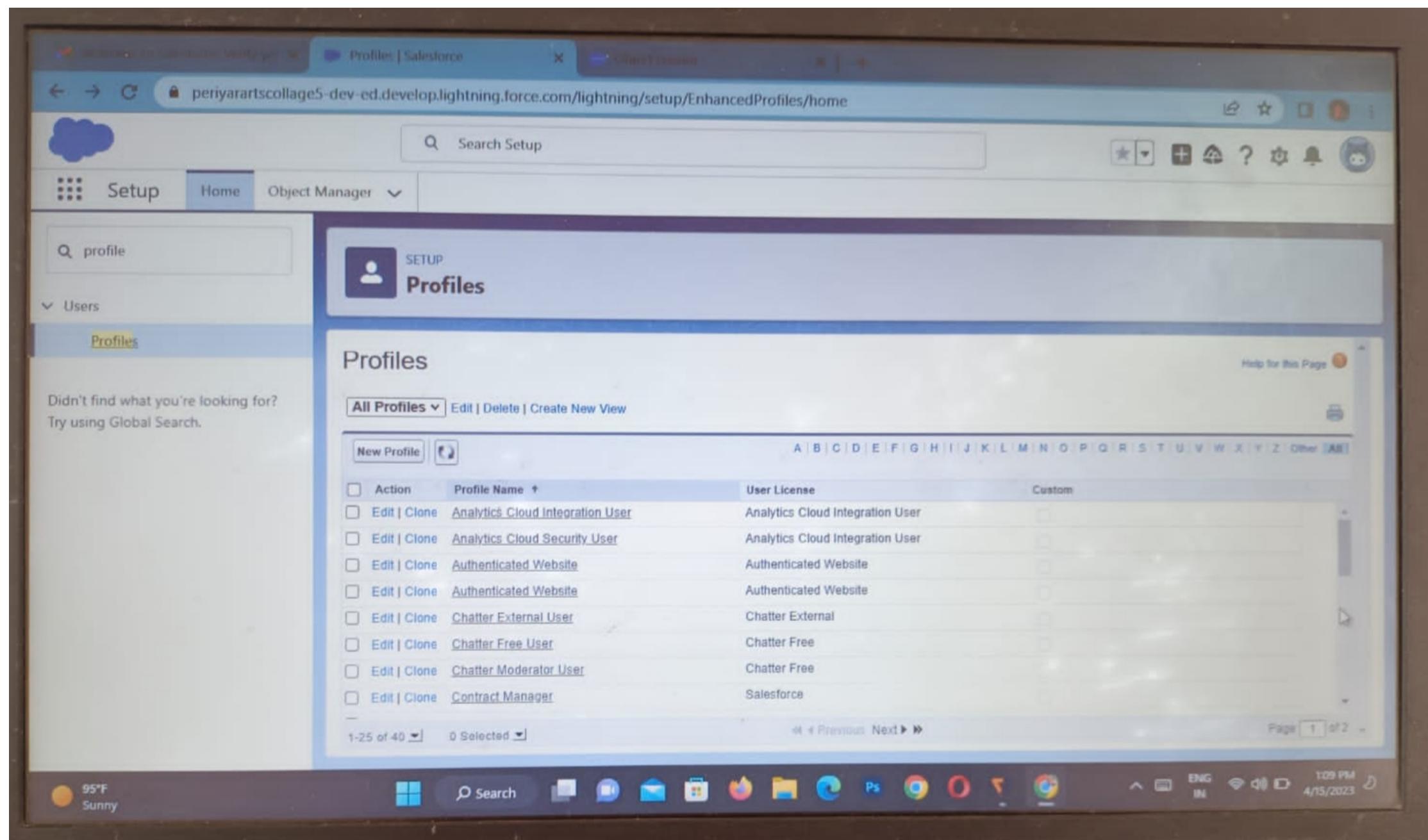
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2.40pm	time__c	Time		
Address	Address__c	Text Area(255)		
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
marks	marks__c	Number(18, 0)		
Parent	Parent__c	Text(34)		

Activity 3: Create field for parent object

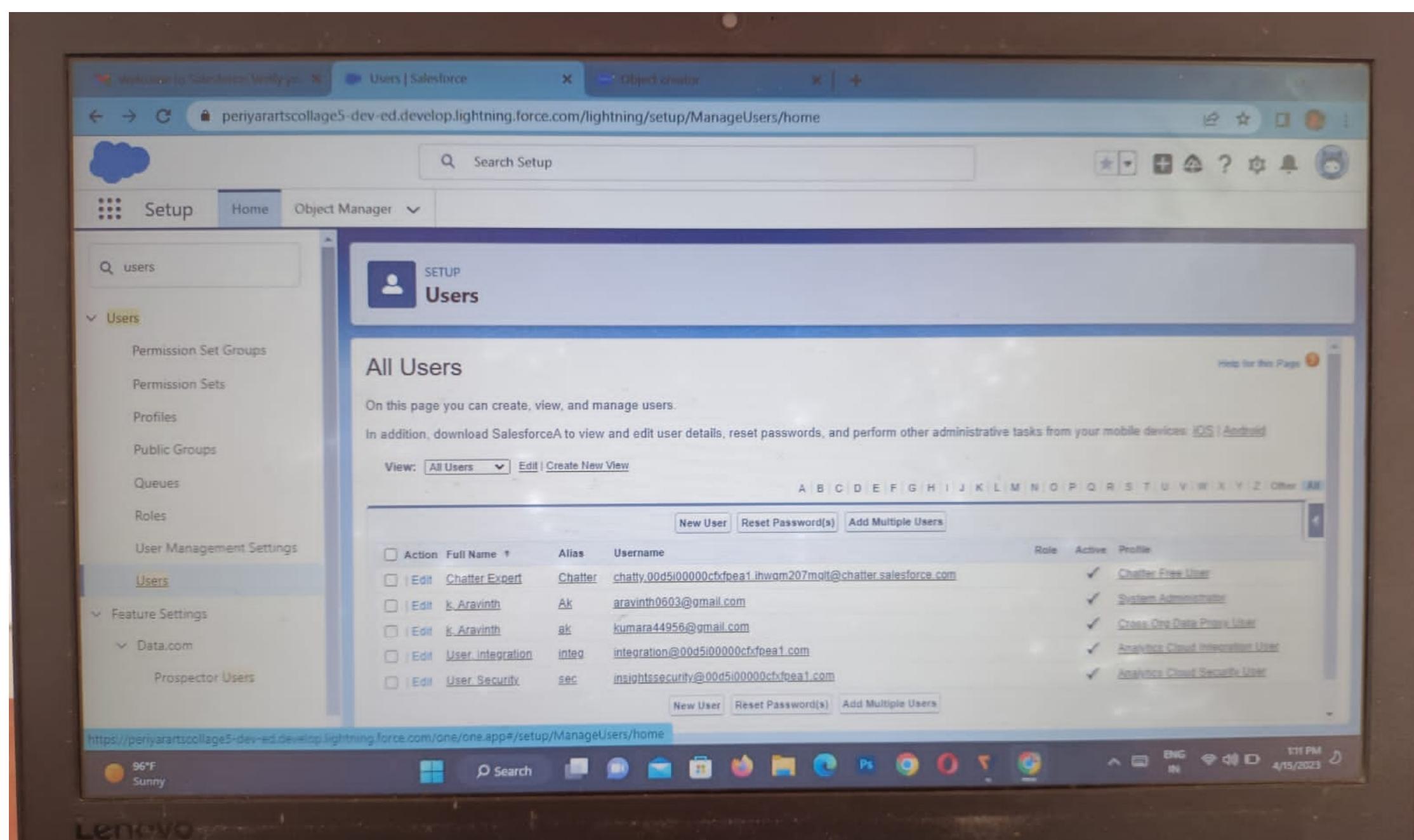
The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The left sidebar lists various setup options. The main area displays a table titled 'Fields & Relationships' with 6 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created Field Label	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
parent address	parent_address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
parent number	parent_number__c	Phone		

Milestone 5: Profile



Milestone 6: Users

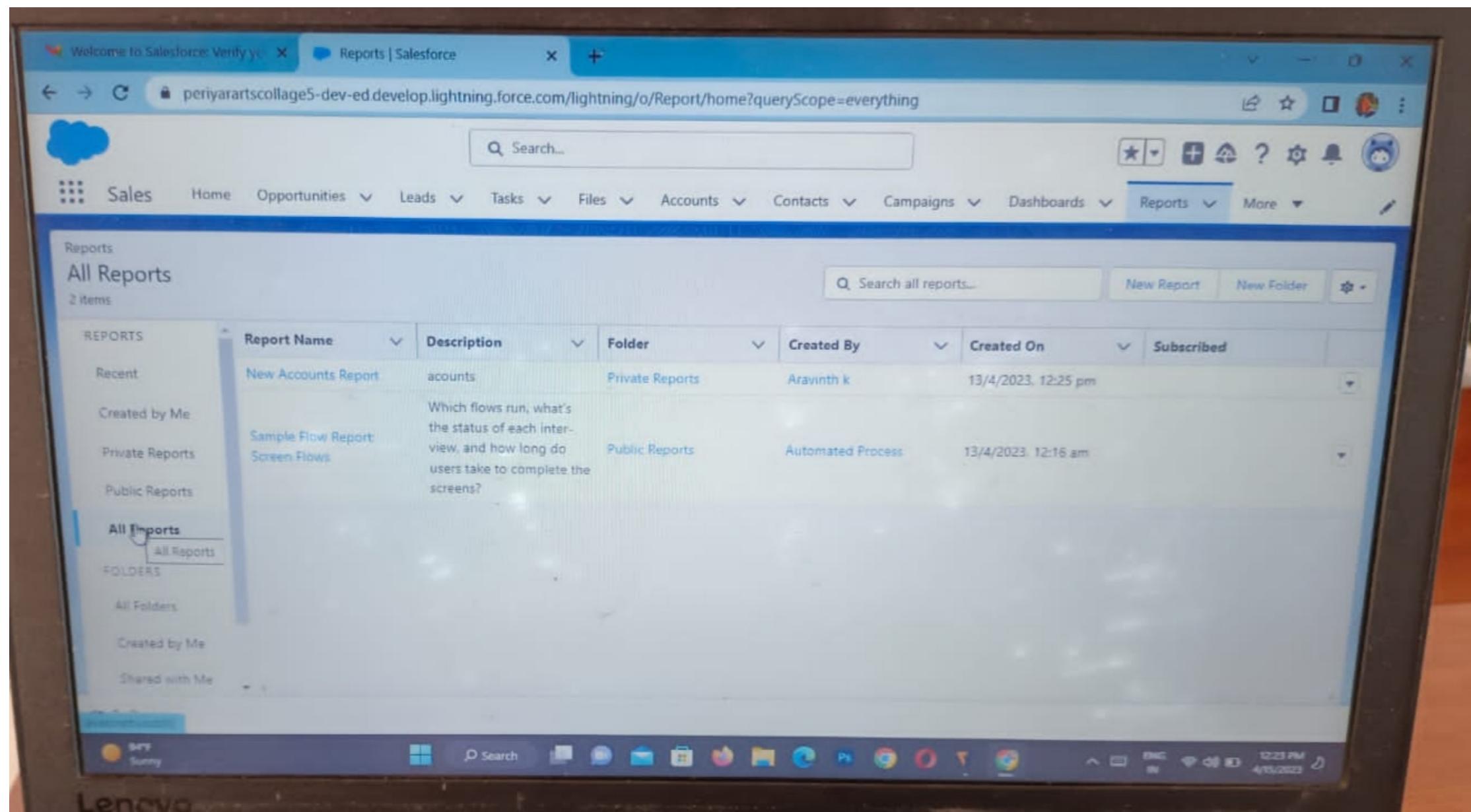


Milestone 7: Permission sets

The screenshot shows the Salesforce 'Permission Sets' page. The URL is <https://periyarartscollege5-dev-ed.lightning.force.com/lightning/setup/PermSets/home>. The page title is 'Permission Sets'. On the left, there's a sidebar with 'Users' expanded, showing 'Permission Set Groups' and 'Permission Sets' selected. The main content area displays a table of permission sets with columns for Action (Clone), Permission Set Label (Buyer, Buyer Manager, CRM User, Commerce Admin, Contact Center Admin, Contact Center Agent), Description, and License (B2B Buyer Permission Set One Seat, B2B Buyer Manager Permission Set One Seat, CRM User, Commerce Admin Permission Set License Seats, Service Cloud Voice User, Service Cloud Voice User). There are 26 items listed, with pages 1 and 2 available.

The screenshot shows the Salesforce 'Permission Sets' page. The URL is <https://governmentartscollegecmutl-dev-ed.lightning.force.com/lightning/setup/PermSets/home>. The page title is 'Permission Sets'. The sidebar on the left shows 'Permission Set Groups' and 'Permission Sets' selected under 'Users'. The main content area displays a table of permission sets with columns for Action (Clone), Permission Set Label (Buyer, Buyer Manager, CRM User, Commerce Admin, Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Experience Profile Manager, Facility Manager), Description, and License (B2B Buyer Permission Set One Seat, B2B Buyer Manager Permission Set One Seat, CRM User, Commerce Admin Permission Set License Seats, Service Cloud Voice User, Service Cloud Voice User, Service Cloud Voice User, Salesforce, Facility Manager). There are 28 items listed, with pages 1 and 2 available.

Milestone 8: Reports



Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	- Aravindh k	GenePoint	CA	Customer - Channel	Cold	13/04/2023
2	- Aravindh k	United Oil & Gas, UK	UK	Customer - Direct	-	13/04/2023
3	- Aravindh k	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	13/04/2023
4	- Aravindh k	Edge Communications	TX	Customer - Direct	Hot	13/04/2023
5	- Aravindh k	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	13/04/2023
6	- Aravindh k	Pyramid Construction Inc.	-	Customer - Channel	-	13/04/2023
7	- Aravindh k	Dickenson plc	KS	Customer - Channel	-	13/04/2023
8	- Aravindh k	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	13/04/2023
9	- Aravindh k	Express Logistics and Transport	OR	Customer - Channel	Cold	13/04/2023
10	- Aravindh k	University of Arizona	AZ	Customer - Direct	Warm	13/04/2023

4. Trailhead Profile Public URL

Team Lead-<https://trailblazer.me/id/aravindh12>

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

Project Report Template

5. Advantage&Disadvantage:

ADVANTAGE:

1. Improved Informational Organization. ...
- 2.CRM for Enhanced Communication. ...
- 3.CRM Improves Your Customer Service. ...
- 4.Automation of Everyday Tasks. ...
- 5.Greater efficiency for multiple teams. ...
- 6.Improved Analytical Data and Reporting.

DISADVANTAGE:

- 1.CRM costs. One of the greatest challenges to CRM implementation is cost. ...
- 2.Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. ...
- 3.Poor communication. ...

4.Lack of leadership.

6. Application:

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.

7. Conclusion:

Customer Relationship Management(CRM) enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

8. Future Scope:

Defining the scope of CRM projects means figuring out which areas of your business need to be included in the CRM implementation plan.

Before any CRM initiative begins, scoping is essential to establish what the effort will and will not cover, as well as to prevent feature creep and project bloating.