

A CRM Application for schools (or) colleges

INTRODUCTION

1.1 Overview

Project Description

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.

What I'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Profile
4. Users
5. Reports
6. Permission sets
7. Reports

A CRM is a customer-centric system that can help education professionals nurture relationships with prospects and enrollees, produce data-driven insights to illustrate

progress towards goals, and streamline their admissions and marketing initiatives to save time and effort.

In the right hands, this is a tool with immense value. For those who are new to the concept of CRM, though, or are in the process of adopting and exploring CRM platforms, it may not be readily apparent exactly how to harness the power of this type of system.

1.2 purpose

To help you take the right decision in choosing a CRM for your educational organisation, here we have devised the top 10 benefits of using a purpose-built CRM in the education industry-

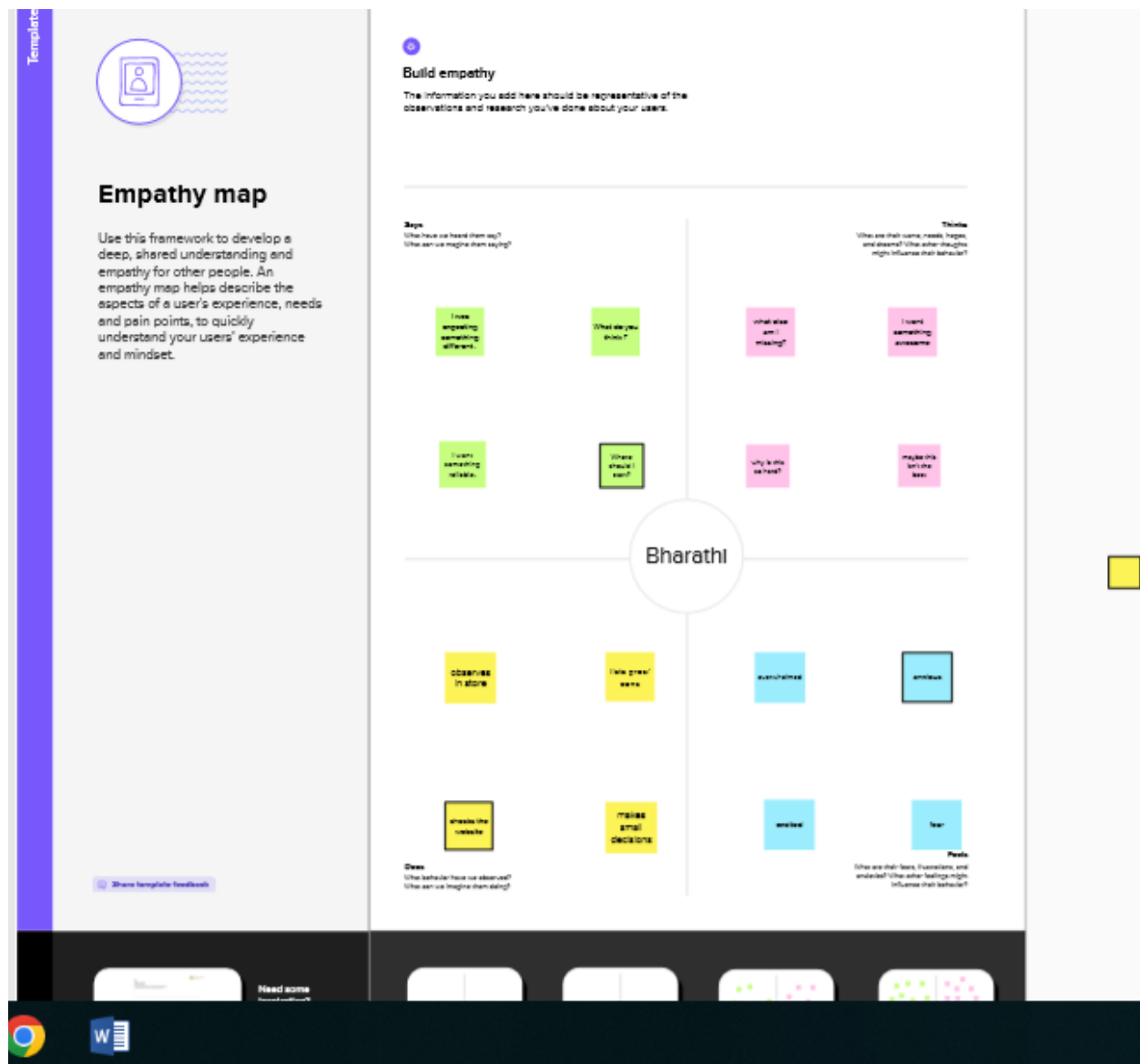
1. **Improved Enrolments:** A CRM system can help counsellors/ sales representatives to more effectively manage and track leads, resulting in improved overall efforts and increased enrolment numbers.
2. **Personalised Communication:** A CRM system allows educational institutions to personalise communication with leads/ prospects or students, resulting in more effective communication and better relationships.
3. **Lead Management:** Educational organisation to more effectively manage leads, including lead scoring, segmentation, and personalised follow-up.
4. **Automated Communication:** Automating communication works wonders for educational organisation, thus, it is one of the most beneficial features of CRM in the Education Industry. It allows counsellors/ sales representatives to communicate with leads and students, to keep them engaged and interested over time

5. **Data-driven decision making:** A CRM system provides counsellors/ sales representatives with the data they need to make informed decisions about recruitment, marketing, and other vital areas.
6. **Improved student engagement:** CRMs help in improving student engagement by tracking student interactions and providing personalised communication.
7. **Better Communication:** One of the most beneficial reasons to use CRM in education industry is that it improves communication between different departments within an educational institution, helping to increase efficiency and collaboration.
8. **Increased Revenue:** By improving enrolment and student engagement, a CRM system can help educational organisation in increasing revenue.

Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making.

Problem Definition & Design Thinking

2.1 Empathy map





2.2 Ideation & Brainstorming map

The screenshot shows a Mural workspace titled "A CRM Application for school/colleges". The workspace is divided into eight columns, each representing a person's perspective on the application. The columns are labeled "Person 1" through "Person 8".

Person 1: Contains notes on "all team members use whiteboards specifically", "distributed teams use whiteboards for visual collaboration in real-time", and "there are a lot of tools remote workers".

Person 2: Contains notes on "what kind of features to be more correspond users needs", "with online whiteboards", "people use together", "how people use tools", and "what kind of tools".

Person 3: Contains notes on "skype", "more templates for brainstorming", and "socialtime".

Person 4: Contains notes on "push messages", "video for youtube channel", and "videocalls".

Person 5: Contains notes on "when you read" and "can share be a contributor".

Person 6: Contains notes on "when you read" and "can share be a contributor".

Person 7: Contains notes on "when you read" and "can share be a contributor".

Person 8: Contains notes on "when you read" and "can share be a contributor".

The workspace also includes a sidebar with various tools and a bottom toolbar. The bottom toolbar shows the Windows taskbar with icons for the Start menu, Search, Task View, Edge, File Explorer, Mail, Chrome, and Word. The system tray shows the date and time as 04:12 on 11-04-2023.

3.1 Data Model:

Object name	Fields in the object										
Object 1 school	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Address</td><td>Text area</td></tr> <tr> <td>district</td><td>Text area</td></tr> <tr> <td>state</td><td>Text area</td></tr> <tr> <td>School websites</td><td>Text area</td></tr> </table>	Field label	Data type	Address	Text area	district	Text area	state	Text area	School websites	Text area
Field label	Data type										
Address	Text area										
district	Text area										
state	Text area										
School websites	Text area										
Object 2 student	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Phone number</td><td>phone</td></tr> <tr> <td>results</td><td>picklist</td></tr> <tr> <td>class</td><td>number</td></tr> <tr> <td>marks</td><td>number</td></tr> </table>	Field label	Data type	Phone number	phone	results	picklist	class	number	marks	number
Field label	Data type										
Phone number	phone										
results	picklist										
class	number										
marks	number										
Object 3 parent	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Parent address</td><td>Text area</td></tr> <tr> <td>Parent number</td><td>phone</td></tr> <tr> <td></td><td></td></tr> </table>	Field label	Data type	Parent address	Text area	Parent number	phone				
Field label	Data type										
Parent address	Text area										
Parent number	phone										

3.1 Activity and screenshot:

Milestone-2: Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Activity-1: Creation of School Object

Creation of Objects for School Management:

For this school management we need to create 3 objects i.e. school, parents and students. The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup
2. 2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - On the Custom Object Definition page, create the object as follows:
 - Label: School
 - Plural Label: Schools
 - Record Name: School Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox
 - Click Save.

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governmentthirumagalmills9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QPbt/edit?address=%2F0112w000003QPbt%2Fe%...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
school

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

Edit Custom Object
school

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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.

Label school Example: Account

Plural Label schools Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name school Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Help for this Page

00:38 11-04-2023

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governmentthirumagalmills9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QPbt/edit?address=%2F0112w000003QPbt%2Fe%...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
school

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

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Save Save & New Cancel

00:39 11-04-2023

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

In the same way create other objects such as students and parents

Activity 2: Create student object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:

- Label: Students

- Plural Label: Students

- Record Name: Student Name

- Check the Allow Reports checkbox

- Check the Allow Search checkbox

- Click Save. Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Object Tabs, click New.

1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

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governmentthirumagalmillsc9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QPdG/edit?address=%2F0112w000003QPdG%2Fe...

Setup Home Object Manager

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

☒ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing

Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [What is this?](#)
☐ In Development
☒ Deployed

Search Status
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Save Save & New Cancel

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governmentthirumagalmillsc9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

SETUP
Object Manager
1 Items, Sorted by Label

Search Setup

Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
student	student__c	Custom Object		13/03/2023	✓

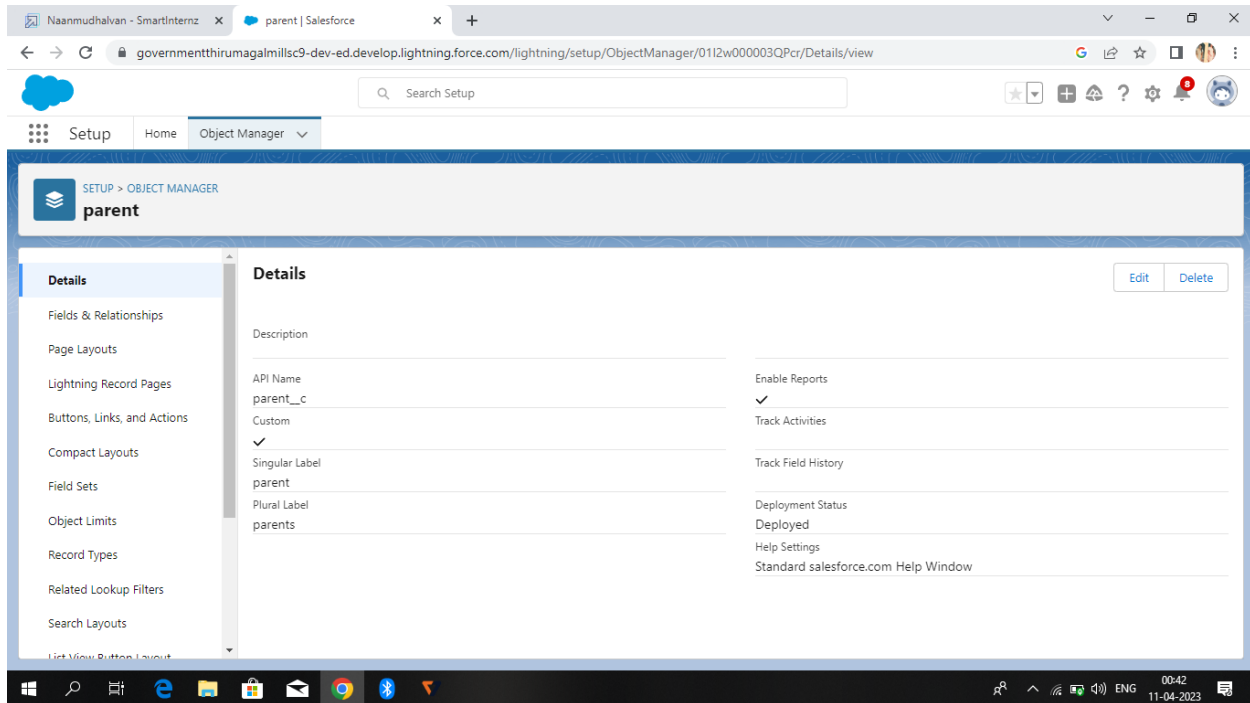
Activity 3: Create parent object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:
- Label: Parent
- Plural Label: Parents
- Record Name: Parent Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

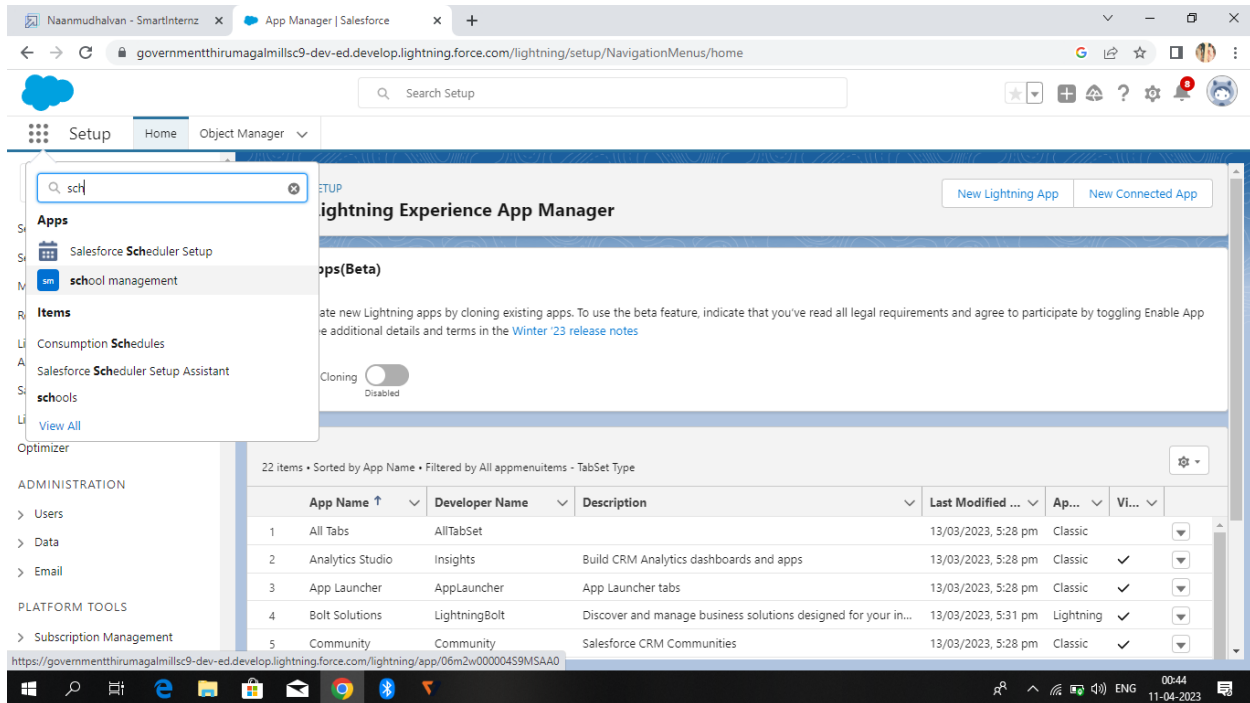
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



Milestone-3: Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs



Activity:

Create the School Management app

- From Setup, enter App Manager in the Quick Find and select App Manager
- Click New Lightning App. Enter School Management as the App Name, then click next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.

The screenshot shows the Lightning App Builder interface for a 'school management' app. The left sidebar contains 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.'

The 'App Details' section contains the following fields:

- *App Name:** school management
- *Developer Name:** school_management
- Description:** Enter a description...

The 'App Branding' section includes:

- Image:** A placeholder box with an 'Upload' button.
- Primary Color Hex Value:** #0070D2
- Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme'.
- App Launcher Preview:** A preview showing a blue square with 'sm' and a grey rectangle with 'school management'.

● From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

The screenshot shows the Salesforce Setup interface for a 'school' org. The left sidebar contains 'Setup' with sub-items: 'Fields & Relationships' (selected), '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 content area is titled 'Custom Field Definition Detail' and includes tabs: 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'.

The 'Field Information' section contains the following details:

Field Label	Address	Object Name	school
Field Name	Address	Data Type	Text Area
API Name	Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	BHARATHILY, 14/03/2023, 10:26 am	Modified By	BHARATHILY, 14/03/2023, 10:26 am

The 'General Options' section includes:

- Required:** ☐
- Default Value:**

The 'Validation Rules' section includes a 'New' button and a message: 'No validation rules defined.'

● To verify your changes, click the App Launcher, type School Management and select the School Management app.

Note:

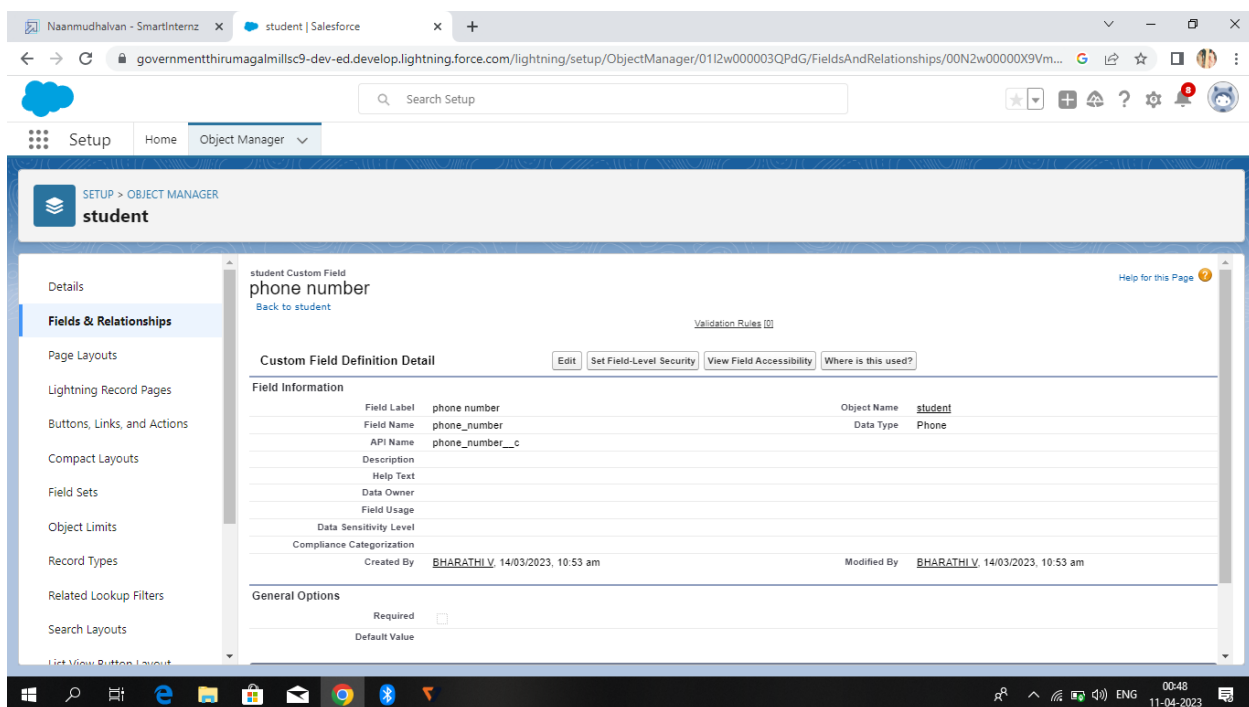
1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

Milestone -4: Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1: Creation of fields for the School objects:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home



3. Select School.

4. Select Fields & Relationships from the left navigation, and click New

Now we're ready to make a custom field. Let's do this!

1. Select the Text Area as the Data Type, then click next.

2. For Field Label, enter Address.

3. Click Next, Next, then Save & New.

4. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field labels

Now let's create the other fields and we must choose the data types of the fields carefully .Let's have a look at it.

For example, a phone number is a number field.

For that we need to select the phone as data type.

Let's see this

1. Select the Phone as the Data Type, then click Next.

2. For Field Label, enter Phone Number.

3. Click Next, Next, then Save & New.

Let's create Roll-up summary fields to calculate the number of students

1. From Setup, click Object Manager and select School.

2. Click Fields & Relationships, then New.

3. Select the Roll-up summary field as data type

4. Enter the field label as Number of students

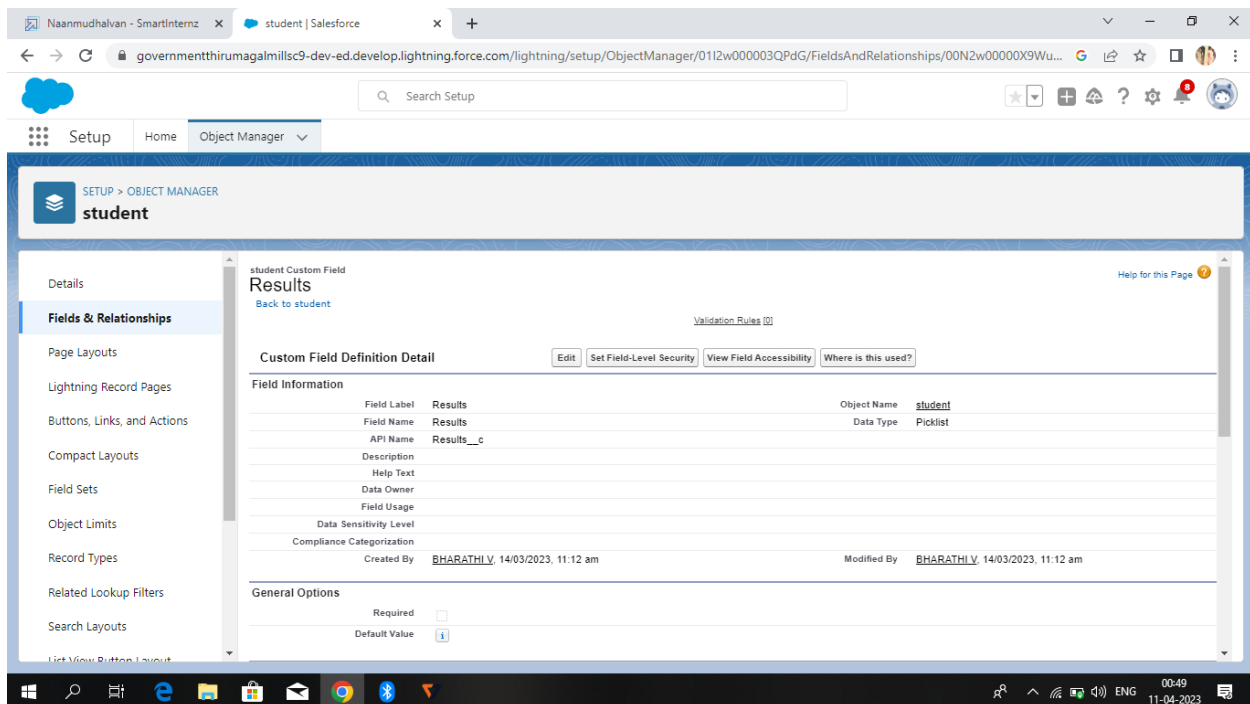
5. Click Next

6. Then select the master object summarized as students and then select count as roll-up and then click Next, Next and save.

1. From Setup, click Object Manager and select School.

2. Click Fields & Relationships, then New.

3. Select the Roll-up summary field as data type



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

1. Select the Phone as the Data Type, then click next.

2. For Field Label, enter Phone Number.

3. Click Next, Next, then Save & New Let's create a master-detail relationship with school object

1. Select Master-Detail Relationship as the Data Type and click next.

2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.

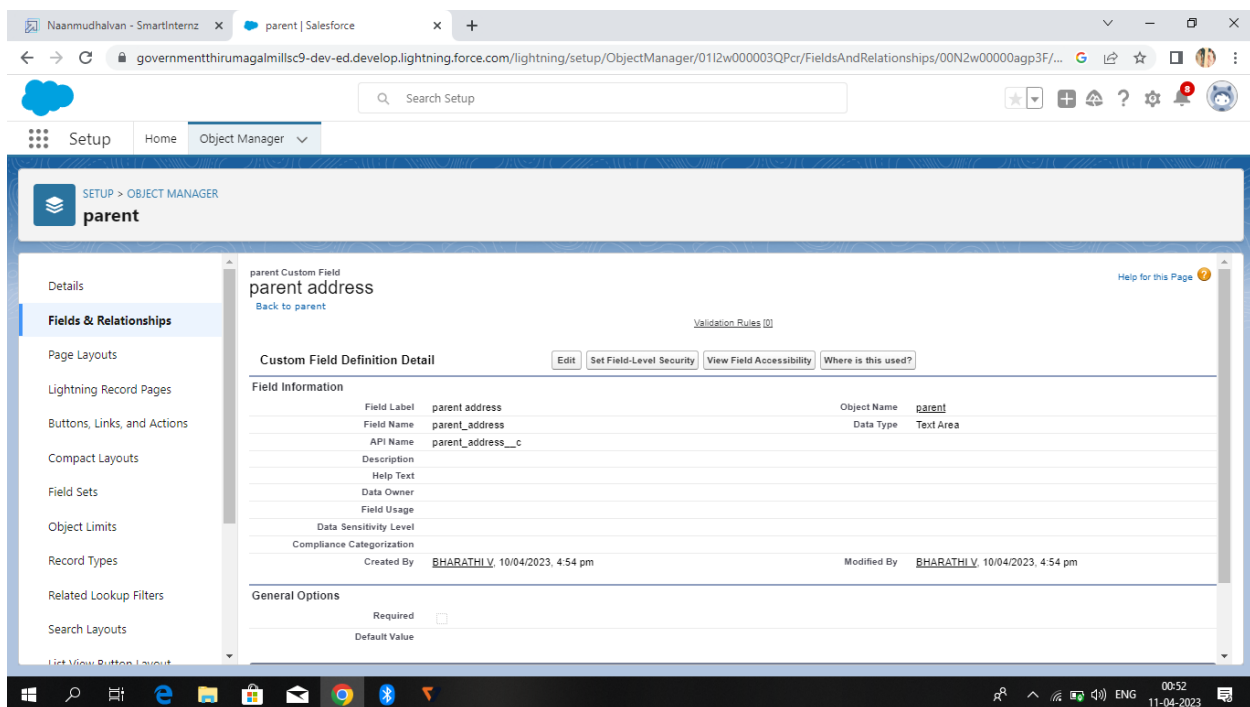
Let's create a Pick-List field:

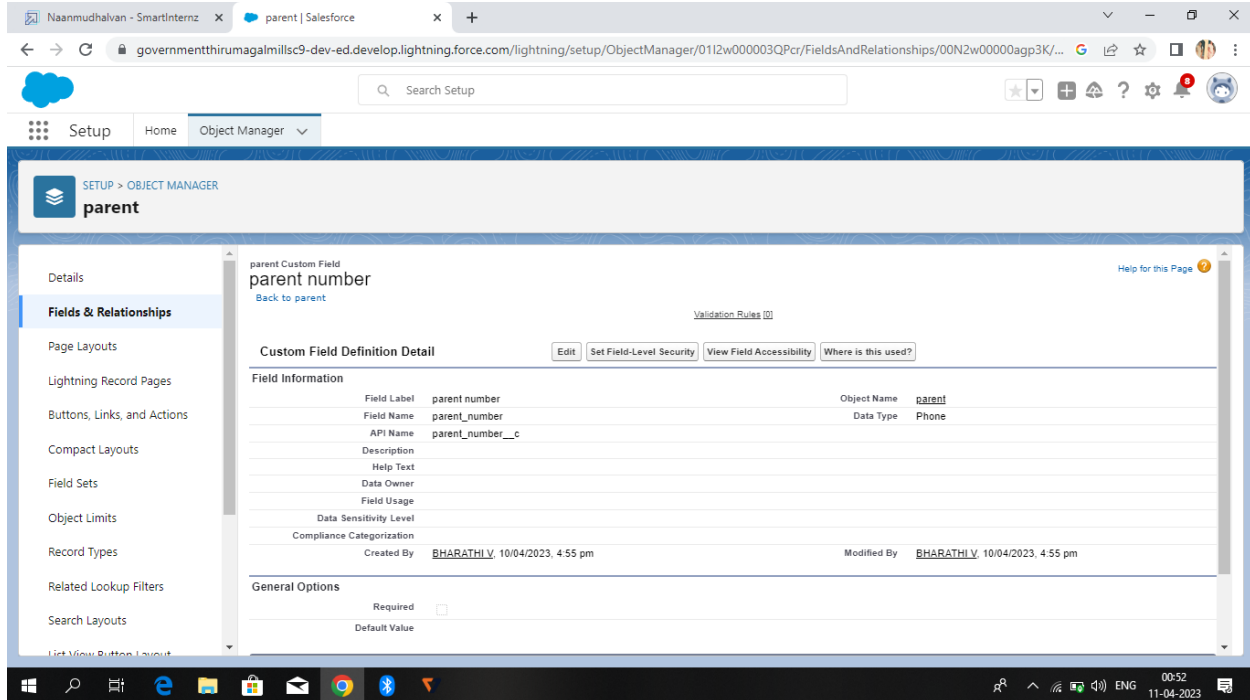
1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Pick list as the Data Type and click next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
6. Pass
7. Fail
8. Click Next, Next, then Save & New Lets create a Number field:

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels

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

1. Select the Text Area as the Data Type, then click next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.
4. Select the Phone as the Data Type, then click next.
5. For Field Label, enter Parent Number.
6. Click Next, Next, then Save & New





Milestone-5: Profile

A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges

Activity:

Creation on profile: From Setup enter Profiles in the Quick Find box, and select Profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter School profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected. The 'School Profile' is displayed, showing its details and page layouts. The profile is named 'School Profile', has a user license of 'Salesforce', and is marked as a 'Custom Profile'. It was created by 'BHARATHI V' on 14/03/2023 at 5:13 pm and modified by the same user on 10/04/2023 at 4:55 pm. The page layouts section shows various layouts assigned to the profile, including 'Global Layout', 'Email Application', 'Home Page Layout', 'Account Layout', 'Object Milestone Layout', 'Operating Hours Layout', 'Opportunity Layout', and 'Opportunity Product Layout'.

4. Click Save.

5. While still on the School profile page, then click Edit.

6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

The screenshot shows the 'Custom Object Permissions' page in the Salesforce Setup interface. A red box highlights the 'Custom Object Permissions' section, and a red arrow points to it. The page displays a table of permissions for various objects, including Activities, Addresses, Alerts, Categories, Customers, Events, Invoices, Orders, Order Details, Payments, Products, Reservations, Roles, Rooms, Services, Student Status, Speakers, Staffs, Students, Student Activities, Suppliers, Teachers, Vendors, Volunteer Activities, Volunteer Jobs, Volunteer Skills, and Volunteer Shift Workers. The table has columns for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All' permissions. The 'View All' and 'Modify All' columns are currently unchecked for all objects.

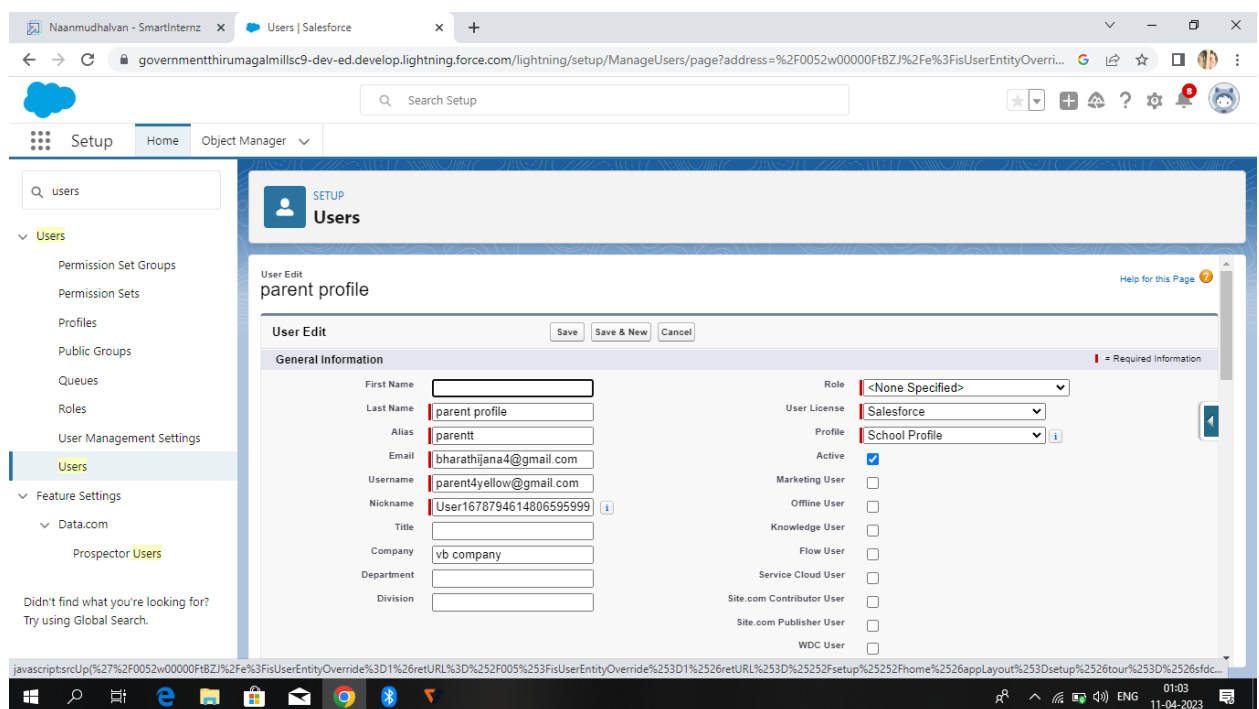
Milestone-6: Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity:

Creating a User's:

1. From Setup, in the Quick Find box, enter Users, and then select Users



2. Click New User
3. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a User License As Salesforce.
5. Select a profile as a School profile.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The 'principal profile' user is being edited. The form includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The Role is set to '<None Specified>' and the User License is 'Salesforce Platform'. The Profile is 'Standard Platform User'. The 'Active' checkbox is checked. The Nickname is 'User1678796431224511734'.

User Edit

principal profile

User Edit Save Save & New Cancel

General Information

First Name: [] Role: <None Specified>

Last Name: principal profile User License: Salesforce Platform

Alias: principa Profile: Standard Platform User

Email: keerthi@gmail.com Active: ☒

Username: keerthi@gmail.com Marketing User: ☐

Nickname: User1678796431224511734 Offline User: ☐

Title: [] Knowledge User: ☐

Company: yb company Flow User: ☐

Department: [] Service Cloud User: ☐

Division: [] Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The 'teacher profile' user is being edited. The form includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The Role is set to '<None Specified>' and the User License is 'Salesforce Platform'. The Profile is 'Standard Platform User'. The 'Active' checkbox is checked. The Nickname is 'User1678796195830910363'.

User Edit

teacher profile

User Edit Save Save & New Cancel

General Information

First Name: [] Role: <None Specified>

Last Name: teacher profile User License: Salesforce Platform

Alias: teacher Profile: Standard Platform User

Email: james@123gmail.com Active: ☒

Username: teacher7pink@gmail.com Marketing User: ☐

Nickname: User1678796195830910363 Offline User: ☐

Title: [] Knowledge User: ☐

Company: yb company Flow User: ☐

Department: [] Service Cloud User: ☐

Division: [] Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

7. Similarly follow the above steps and create 3 users as Teachers and principals

Milestone-7:Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Activity-1:

Permission sets 1:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a 'Quick Find' box and a list of setup categories including 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION', and 'Users'. The 'Users' category is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', and 'Queues'. The main content area displays the 'User Detail' for a user named 'teacher profile'. The user's details are as follows:

User Detail		Role
Name	teacher profile	Role
Alias	teacher	User License
Email	james@123@gmail.com	Profile
Username	teacher7pink@gmail.com	Active
Nickname	User1678796195830910363	Marketing User
Title		Offline User
Company	vb company	Knowledge User
Department		Flow User
Division		Service Cloud User
Address	123 Secret Street Baltimore 21201 Maryland India	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on Charts

3. Give the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user

Similarly follow the above steps for the permission set 2.

Activity-2:

Permission sets 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

Milestone-8: Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

Reports: 1. From the Reports tab, click New Report.

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governmentthirumagalmillsc9-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXliLjJhdHRyaWJ1dGVz...

school management schools students parents Reports Dashboards

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Select a Report Type

Search: sc

Report Type Name	Category
students with schools	Standard
Screen Flows	Custom

Details

students with schools
Standard Report Type

[Start Report](#)

Details Fields (31)

Created By You

[New school with students and parents](#)
Last Used 3/16/2023

Created By Others
No Reports Yet

Windows taskbar: 01:15 11-04-2023

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governmentthirumagalmillsc9-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

school management schools students parents Reports Dashboards

Reports

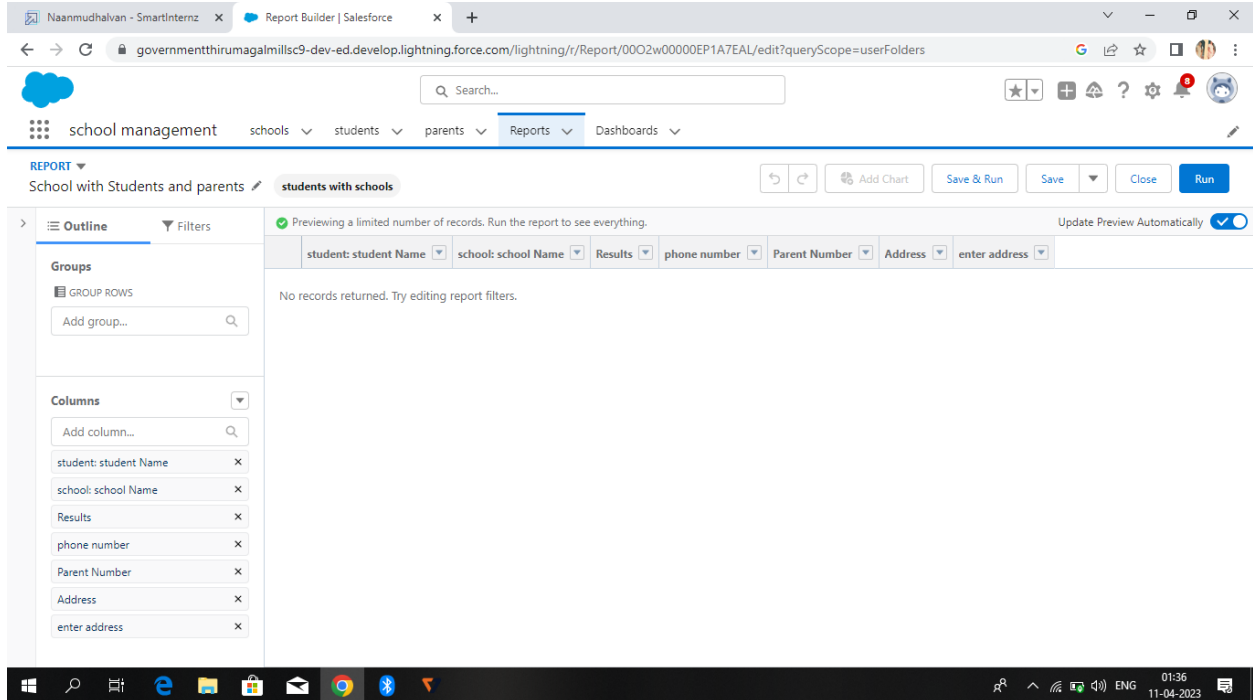
Recent 3 items

Search recent reports... [New Report](#) [New Folder](#)

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	School with Students and parents		Private Reports	BHARATHI V	10/4/2023, 5:21 pm	
Created by Me	New Accounts Report		Private Reports	BHARATHI V	16/3/2023, 7:54 pm	
Private Reports	New school with students and parents		Private Reports	BHARATHI V	15/3/2023, 10:06 am	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

https://governmentthirumagalmillsc9-dev-ed.develop.lightning.force.com/lightning/o/Report/home

Windows taskbar: 01:30 11-04-2023



4. Trailhead Profile Public URL

Team lead: <https://trailblazer.me/id/bharv97>

Team member 1: <https://trailblazer.me/id/bharv97>

Soomiya. V

Team member 2: <https://trailblazer.me/id/bharv97>

Rekha. C

Team member 3: <https://trailblazer.me/id/bharv97>

Prabakaran. T

Team member 4: <https://trailblazer.me/id/bharv97>

Swetha. E

Advantages & Disadvantage:

Advantages:

It allows for more effective sales and marketing.

It can speed up the sales conversion process.

It increases staff productivity, lowers time costs and boosts morale.

It enables widely dispersed teams to work closely.

Can improve customer loyalty through exceptional experience.

Disadvantages:

Staff over-reliance on CRM may diminish customer loyalty through a bad experience.

It may not suit every business.

Security concerns associated with centralised data.

The excess initial time and productivity cost of implementation

It requires a process-driven sales organisation.

APPLICATIONS:

Using CRM in education industry provides organizations 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.

CONCLUSION

From the discussion, you can realize, CRM in the automotive industry is strategically used a model mechanism for brand promotion and customer attraction. The technology comes with imperative customer analysis measures using technological systems for business organization, automation, and synchronization of the business sales, customer services, marketing, and technical support. CRM has been used to promote local and internal customer interaction elevating the marketing initiative.