BHARATHI WOMEN'S COLLEGE (AUTONOMOUS)

CHENNAI-600108

CRM APPLICATION FOR SCHOOLS AND COLLEGES

REG NO	NAME	EMAIL
TEAM LEADER		
2013331072012	KAVITHA.P	catherinp46@gmail.com
TEAM MEMBERS		
2013331072008	JANANI.R	suren231201@gmail.com
2013331072013	NISHANTHI.M	NishanthiNishanthi796@gmail.com
2013331072014	POOJITHA SREE.E	Poojitha.arni@gmail.com

INTRODUCTION

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

OVERVIEW

A CRM is a system that helps schools manage the entire lifecycle of a potential customer — sometimes also referred to as a lead

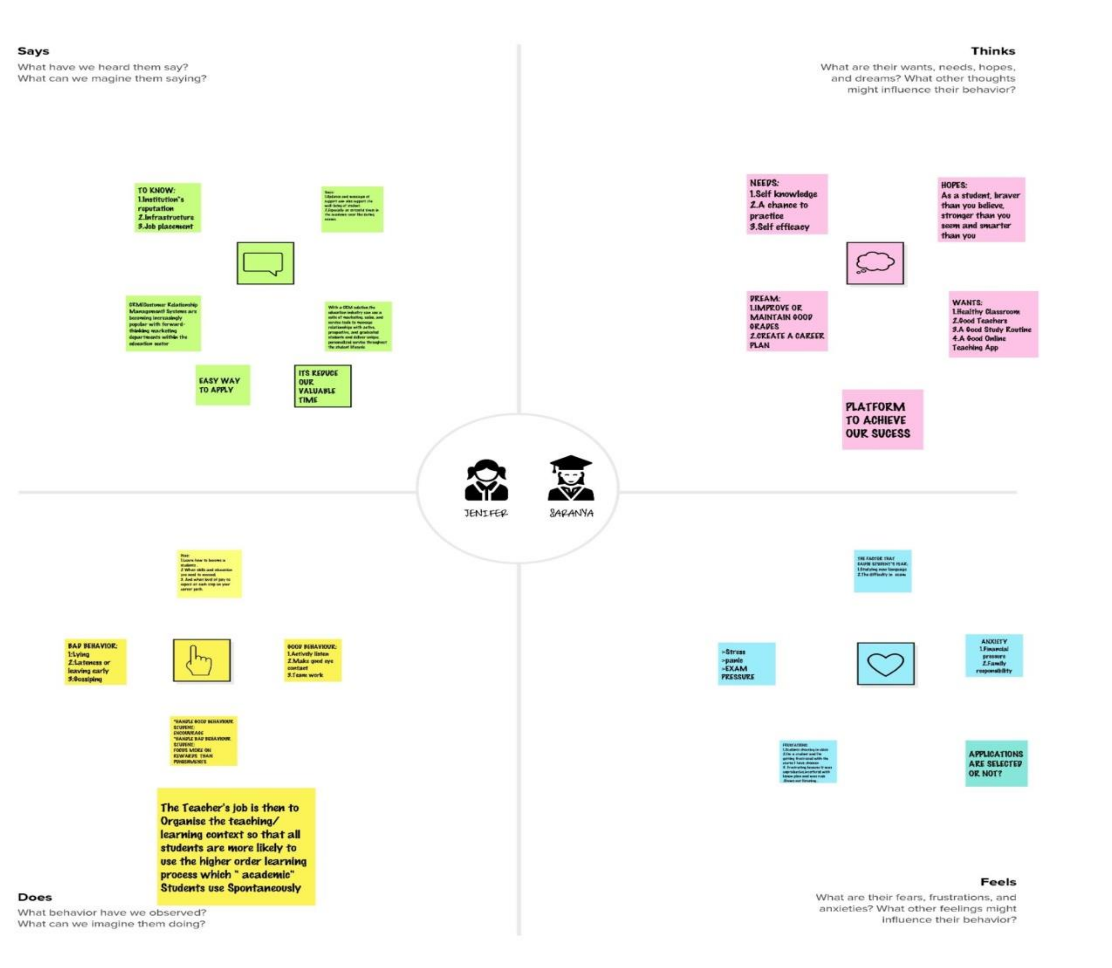
PURPOSE

Managing the Enquiry till the admission of the students and managing the Payments, documents of the students & their progress updates, due date and completion in a smooth way is not an easy task.

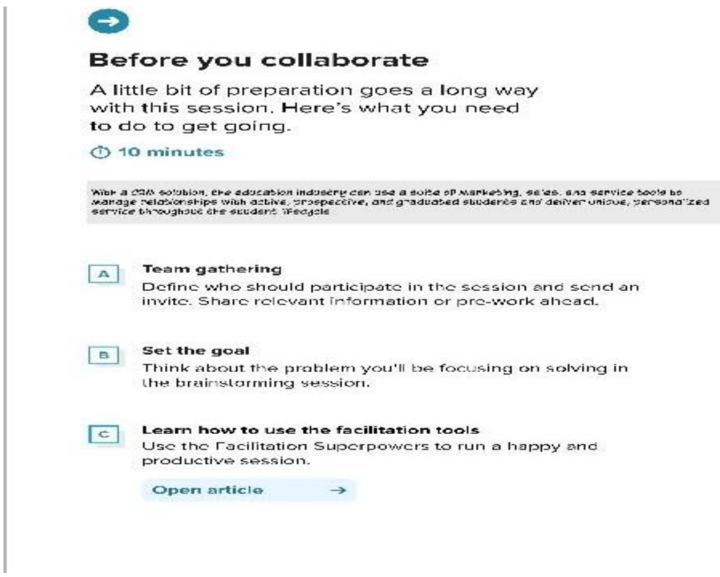
The fundamental purpose of a CRM system is to improve the customer experience.

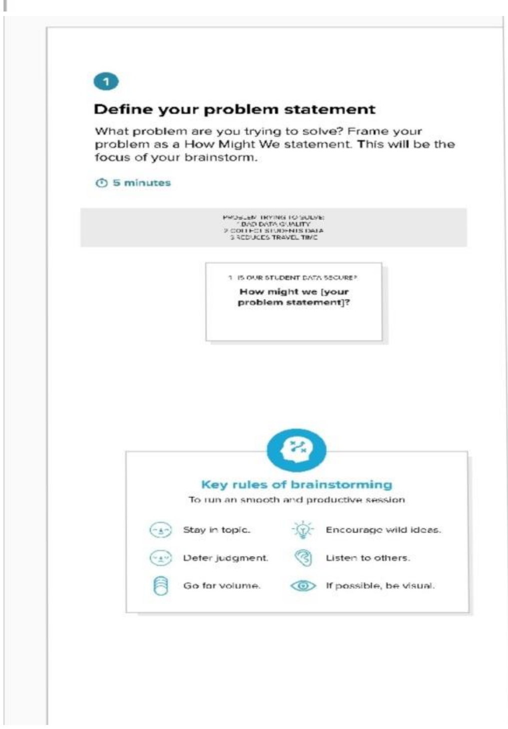
PROBLEM DEFINITION & DESIGN THINKING

Empathy Map



Ideation & Brainstorming Map





2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

SAVING TIME
CONSISTENCY

TIP

You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

KAVITHA.P

- SECURE STUDENTS LOYALTY
- PLATFORM TO NAVIGATE

NISHANTH.M

- STRESS FREE APPLY METHOD
- EASY TO APPLY
- workflow automation.
- Improve classroom environment with attendance tracking.

POOJITHA SREE.E

- [illegible]

JANANI.R

- Helps avoid data leaks
- Prompt students to Fill their application forms
- Increased targeting

3

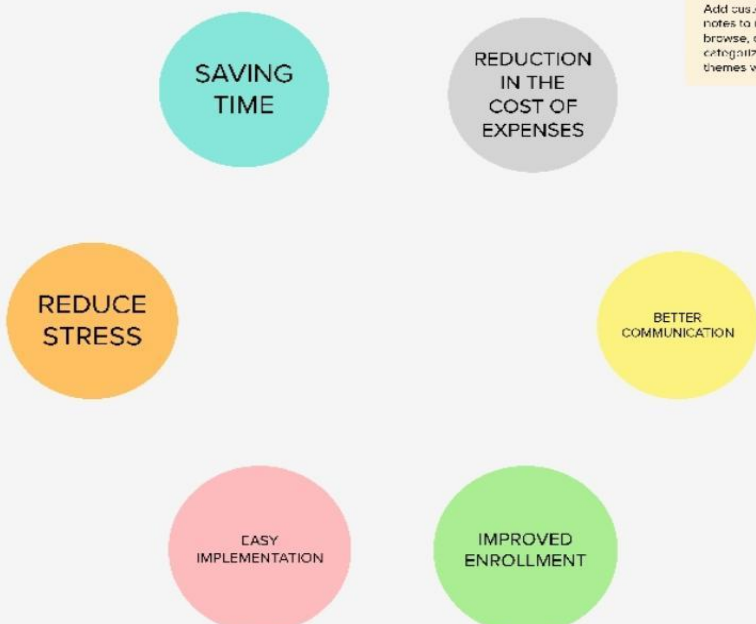
Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.

20 minutes

TIP

Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.



4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes

Importance

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

Feasibility

Regardless of their importance, which tasks are more feasible than others? (Cost, time, effort, complexity, etc.)

RESULT

Data Model:

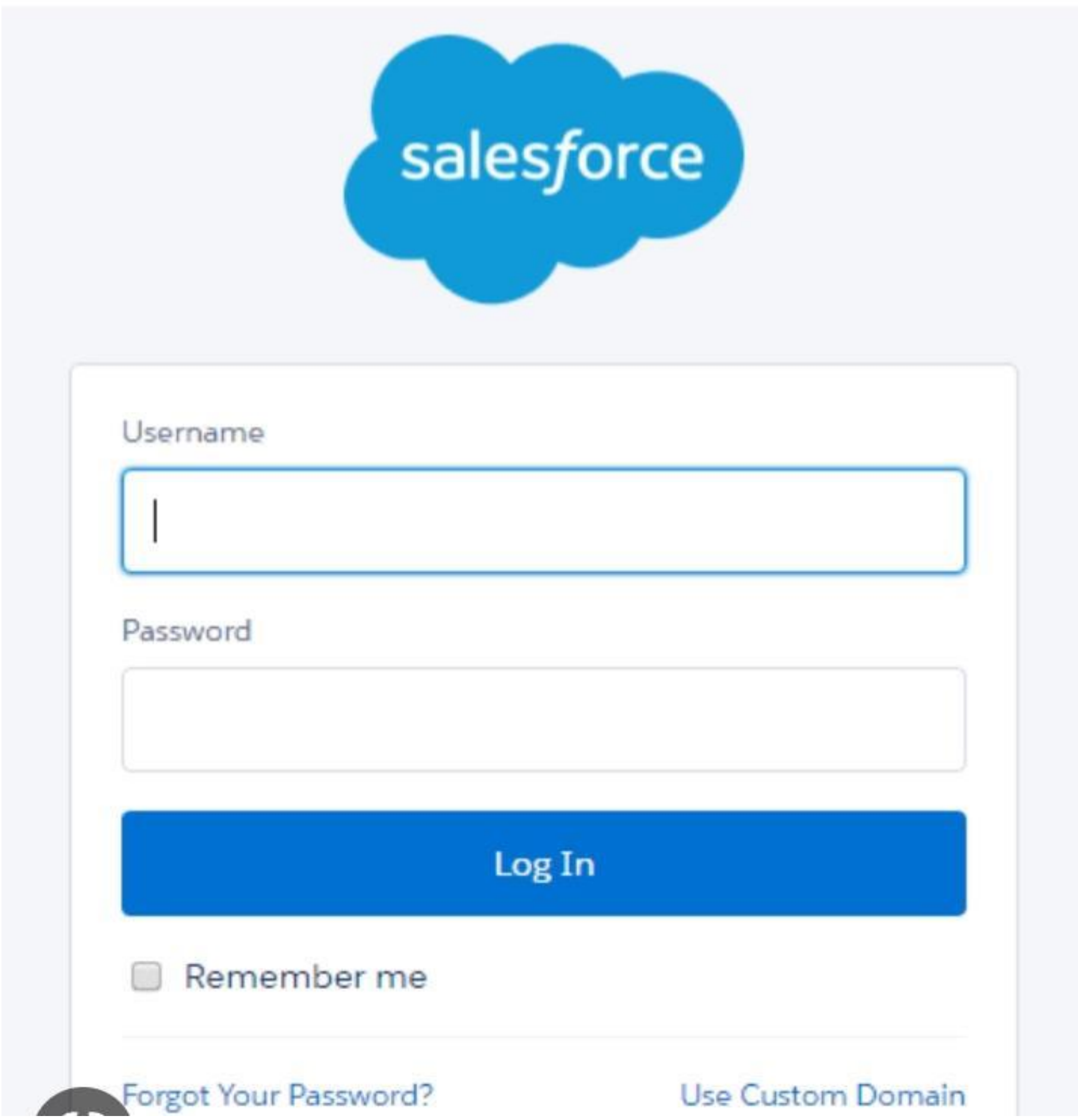
OBJECT NAME	FIELDS IN THE OBJECT	DATA TYPE
OBJECT -1	1.STUDENTS 2.PARENTS	PHONE TEXT AREA
OBJECT -2	3.SCHOOL 4.PRINCIPAL	ROLL UP SUMMARY TEXT

ACTIVITY & SCREENSHOT

Milestone-1:

Introduction

DESCRIPTION:



AccountCreating a developer org in

salesforce.

1.Go to developers.salesforce.com/

2.Click on sign up.

3.On the sign up form, enter the

following details :

a.First name & Last name

a.Email

b.Role : Developer

c.Company : College Name

d.County : India

e.Postal Code : pin code

f.Username : should be a combination

of your name and company

This need not be an actual email id,

you can give anything in the format :

username@organization.com

Welcome to Salesforce!

Click below to verify your account.

Verify Account

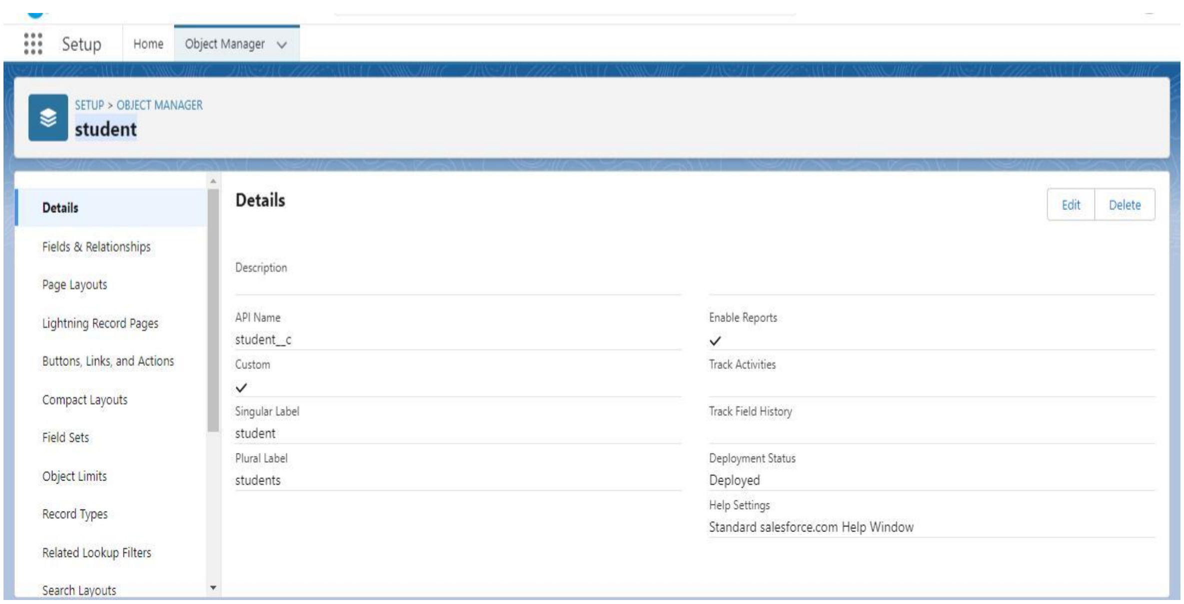
To easily log in later, save this URL:
https://bharathiwomenscollege66-dev-ed.develop.my.salesforce.com

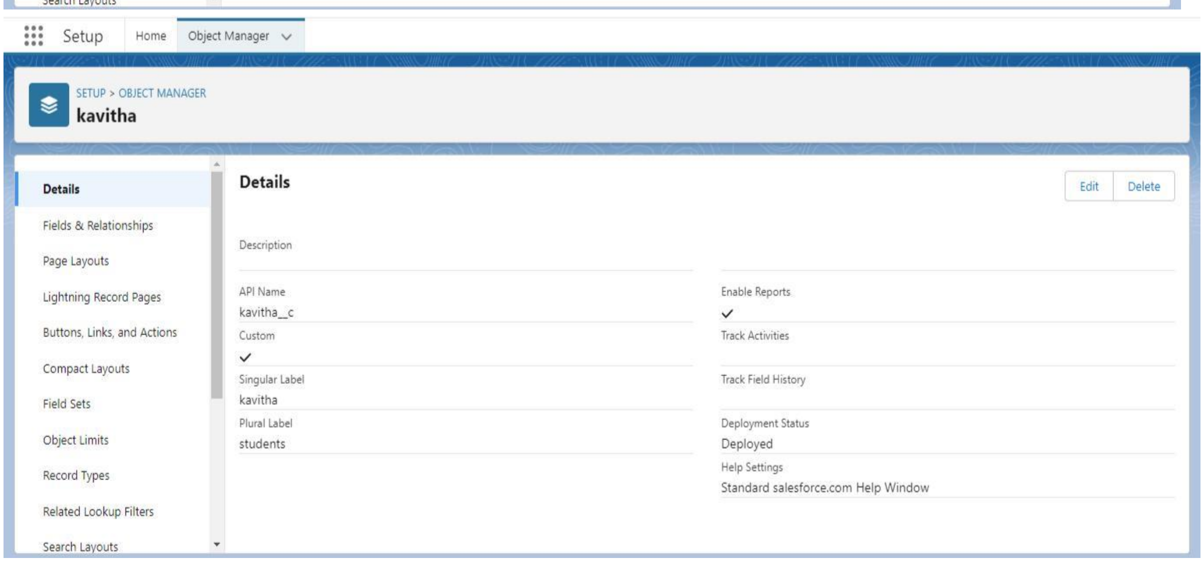
Username:
catherinp46@gmail.com

Again, welcome to Salesforce!

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.





Milestone-3: **Lightning App**

● From Setup, enter App Manager in the Quick Find and select App Manager

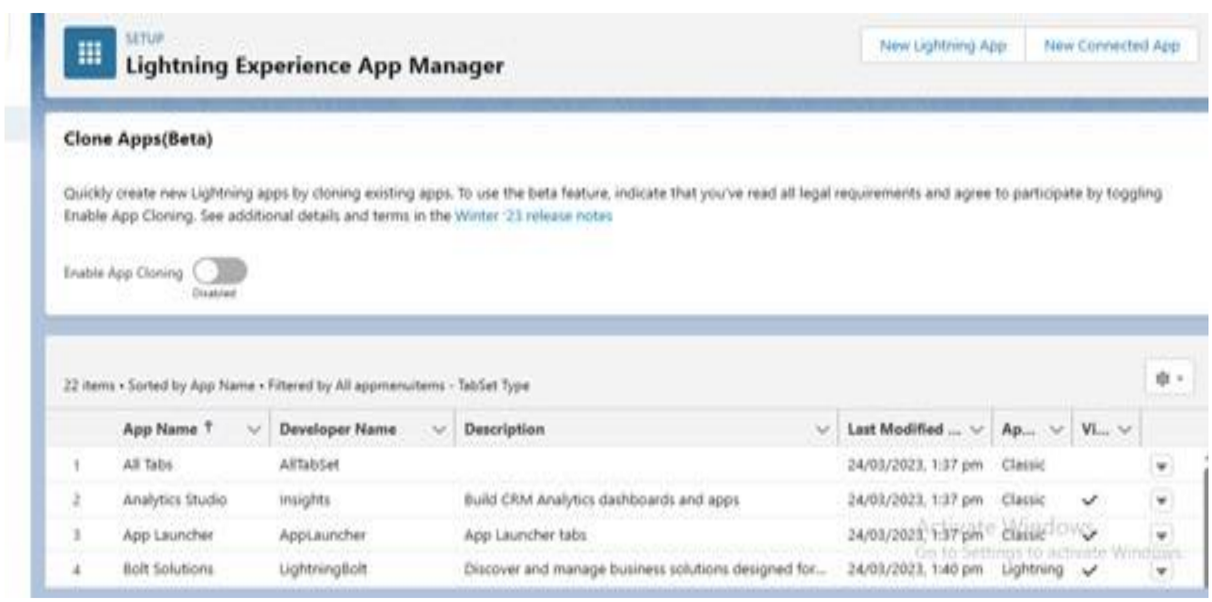
● Click New Lightning App. Enter School Management as the App Name, then click Next

● 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

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



Milestone -4: **Fields and Relationship**

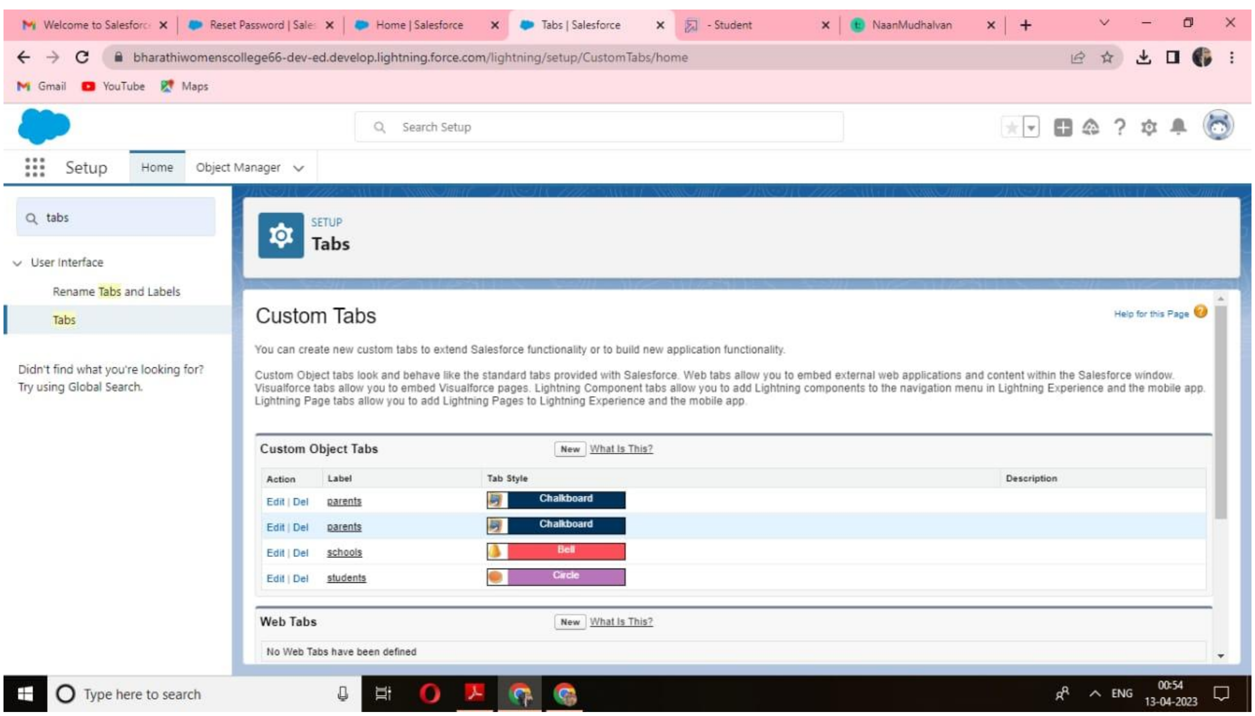
Activity-1: CREATION OF FIELDS FOR THE SCHOOL OBJECTS

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.

Lets 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.

Lets 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
4. Enter the field label as Highest Marks
5. Click Next
6. Then select the master object summarized as students and then select Max as roll-up and
then select Marks as field to aggregate.click Next,Next and save.



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.

Lets create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist 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.

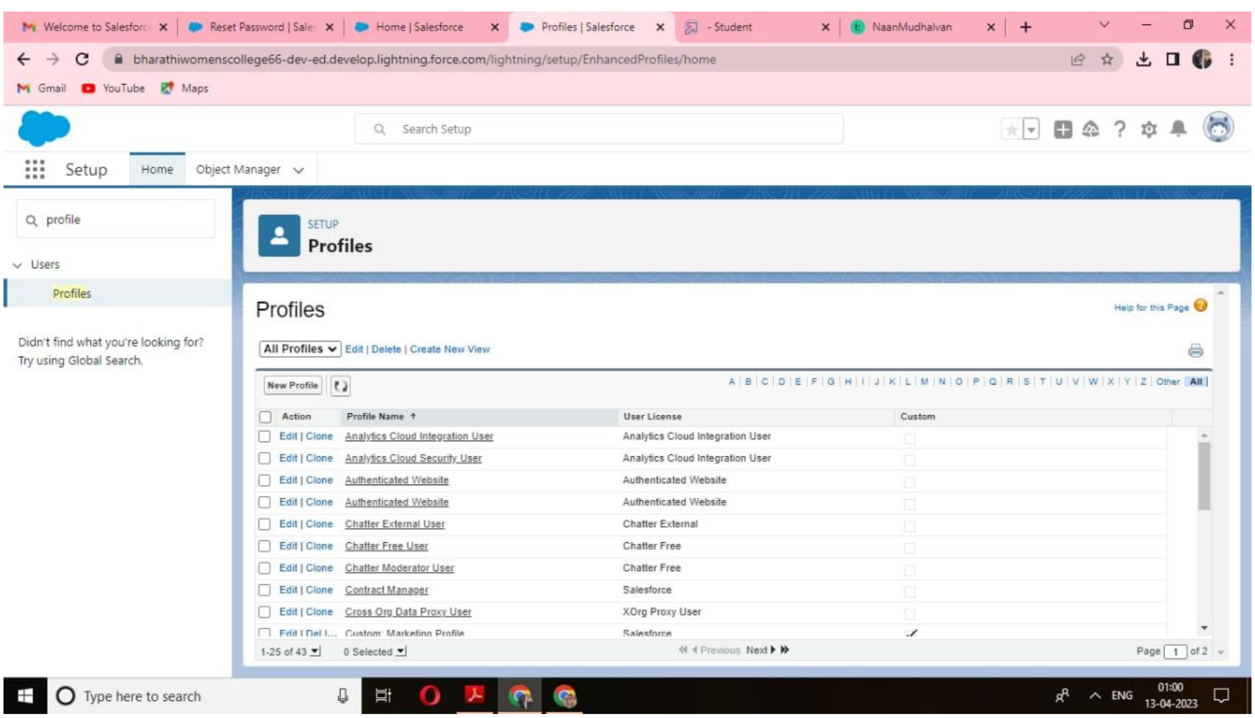
Activity-3:

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

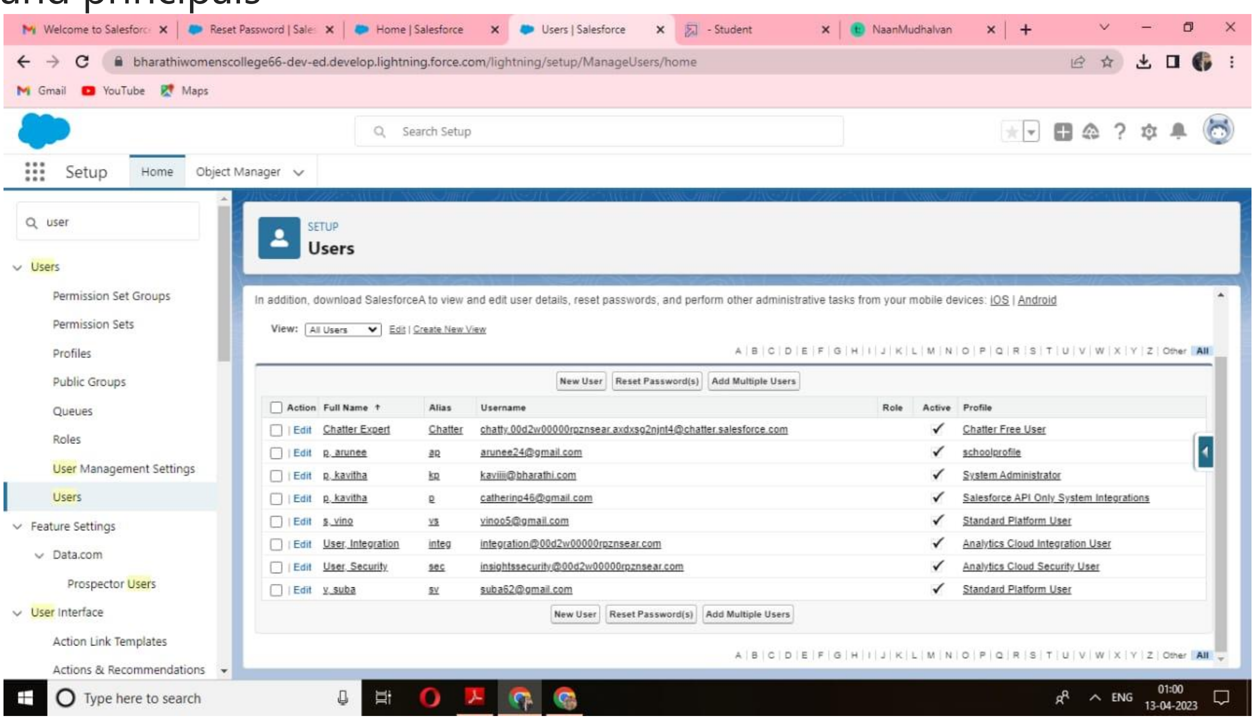
Milestone-5: Profile

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.
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



Milestone-6: Users

Creating a Users:
1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User
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.
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.
7. Similarly follow the above steps and create 3 users as Teachers and principals



Milestone-7:Permission sets

Activity-1:

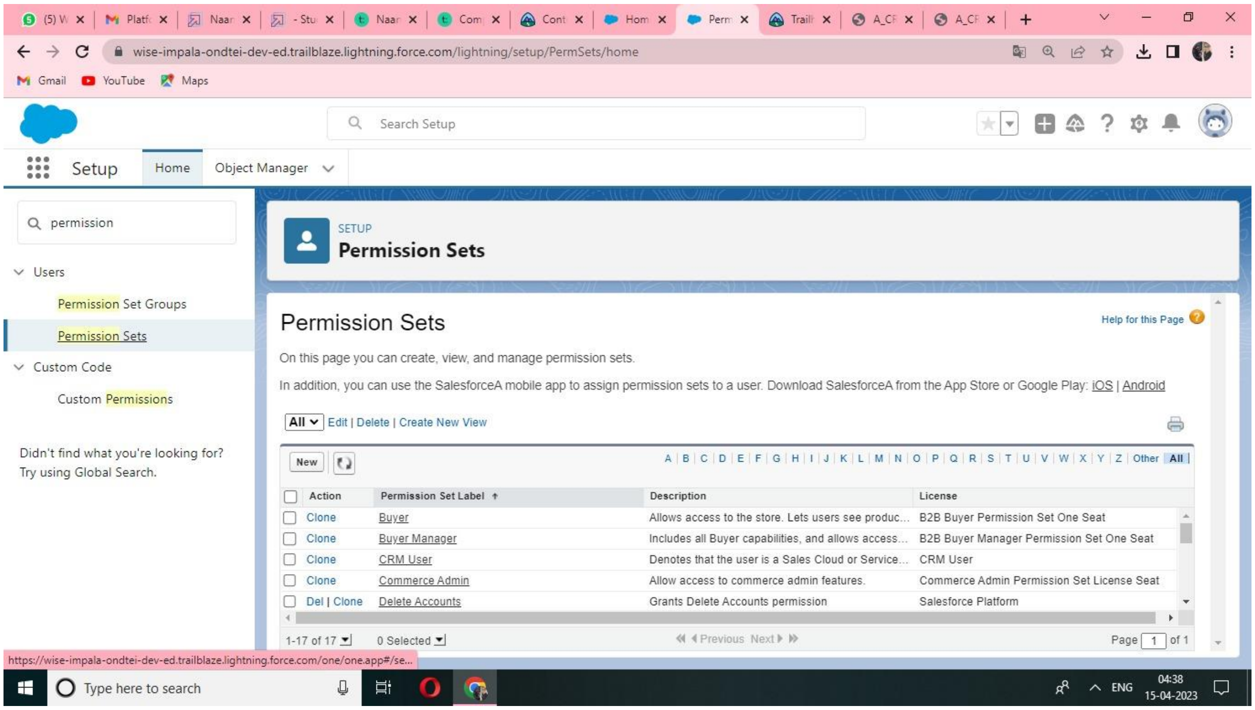
Permission sets 1:

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 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

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.

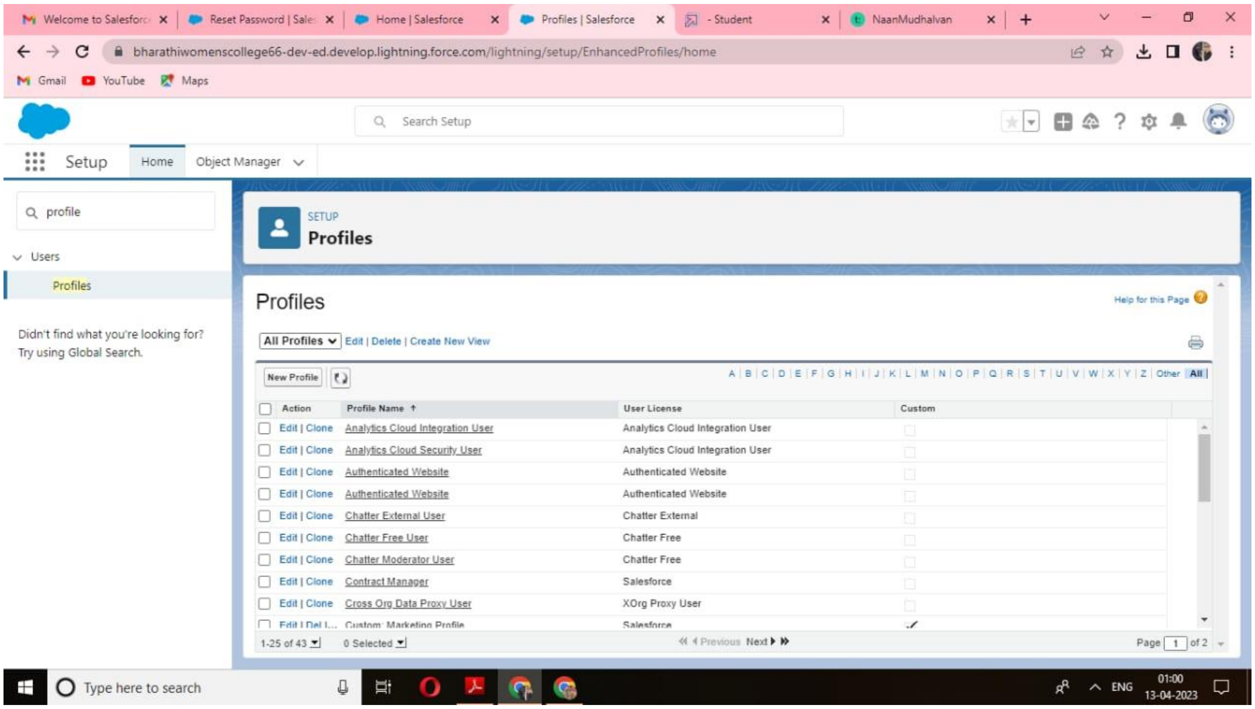


Milestone -8 : Reports

Activity:

Reports :

1. From the Reports tab, click New Report
2. Select the report type as School with students and parents for the report, and click Create
3. Customize your report, then save or run it.



Trailhead Profile Public URL

Team Leader (KAVITHA.P) – https://trailblazer.me/id/catherin09

Team Member 1 (POOJITHA SREE.E) – https://trailblazer.me/id/psree111

Team Member 2 (NISHANTHI.M) - https://trailblazer.me/id/nishm44

Team Member 3 – (JANANI.R) -

ADVANTAGES & DISADVANTAGE

Advantages

- Reduction In The Cost Of Expenses
- Improving The Quality Of Service / Product
- Improving The Organization Management Process.
- History Of Work With Each Student
- Easy Implementation

Disadvantages

- A costly project
- Can be accessed by the third party
- Have poor usability
- Having lots of security concerns
- Loss of collected information or records

APPLICATIONS

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

CONCLUSION

- Automating tasks, providing valuable insights, and facilitating communication and collaboration, education CRM systems provide a comprehensive solution for attracting, managing and scaling enrolments.

FUTURE SCOPE

- Customer Experience
- Personalization
- Integration