

**BHARATHI WOMEN'S COLLEGE (AUTONOMOUS)**

**CHENNAI-600108**

**CRM APPLICATION FOR  
SCHOOLS AND COLLEGES**

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# **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**

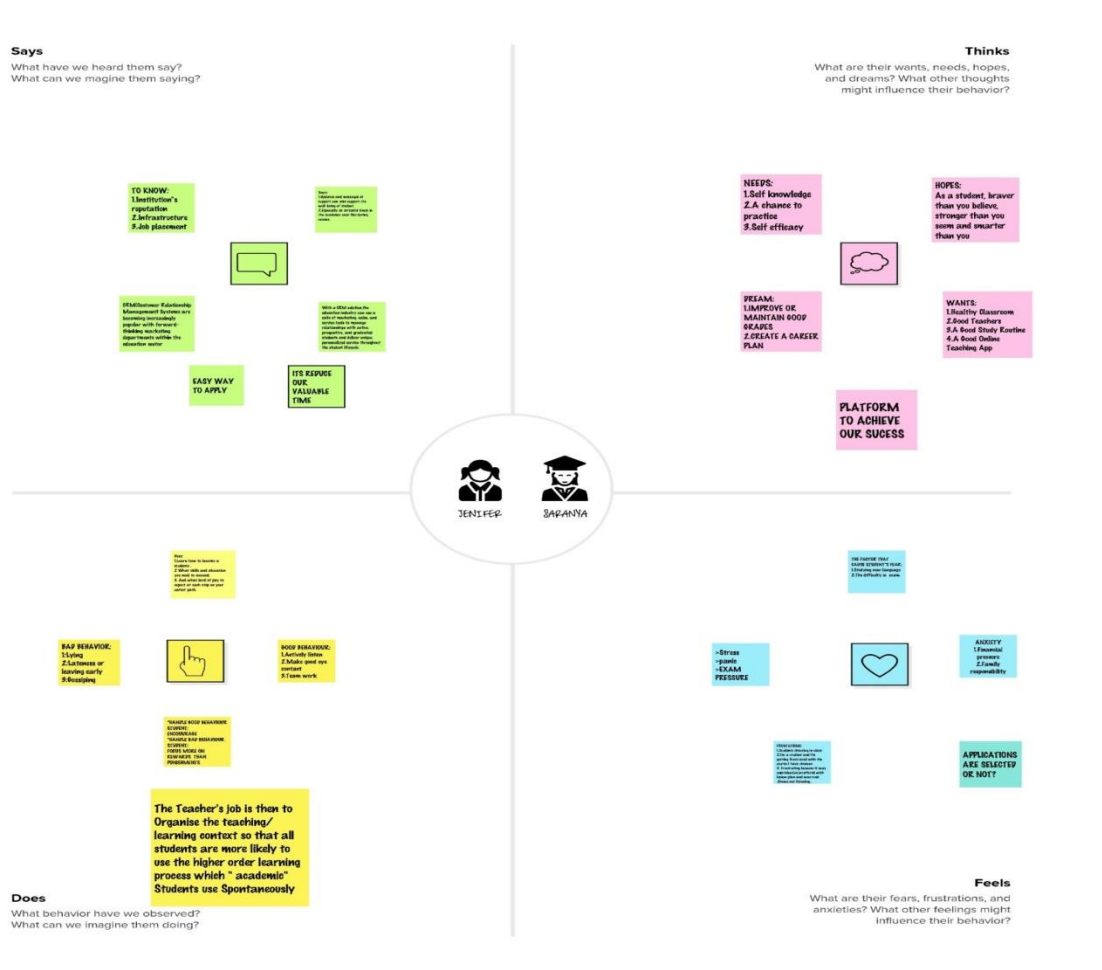
A CRM is a system that helps schools manage the entire lifecycle of a potential customer — sometimes also referred to as a lead

## **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.

## Empathy Map



# Ideation & Brainstorming Map



## Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕒 10 minutes

With a CSA solution, the education industry can use a suite of Marketing, sales, and service tools to manage relationships with active, prospective, and graduated students and deliver unique, personalized service throughout the students' lifecycle.



### Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.



### Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.



### Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)



1

## Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

How might we solve:  
- low data quality  
- complex requirements  
- excessive travel time

1. Is our student data accurate?  
How might we [your problem statement]?



### Key rules of brainstorming

To run a smooth and productive session



Stay in topic.



Encourage wild ideas.



Defer judgment.



Listen to others.



Go for volume.



If possible, be visual.

2

## Brainstorm

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

10 minutes

PSKING TIME  
CONSISTENCY

TIP



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

KAVITHAP

IMPROVE  
PHONE  
SERVICE

SECURE  
STUDENTS  
LOYALTY

INCREASE  
STUDENT  
SATISFACTION

IMPROVE  
PHONE  
SERVICE

PLATFORM  
TO INCREASE

STUDENT  
SATISFACTION

NISHANTHIM

STRESS  
FREE  
APPLY  
METHOD

STUDENT  
SATISFACTION

EASY TO  
APPLY

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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 can break it up into smaller sub-groups.

🕒 20 minutes

SAVING  
TIME

REDUCTION  
IN THE  
COST OF  
EXPENSES

#### TIP

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

REDUCE  
STRESS

BETTER  
COMMUNICATION

EASY  
IMPLEMENTATION

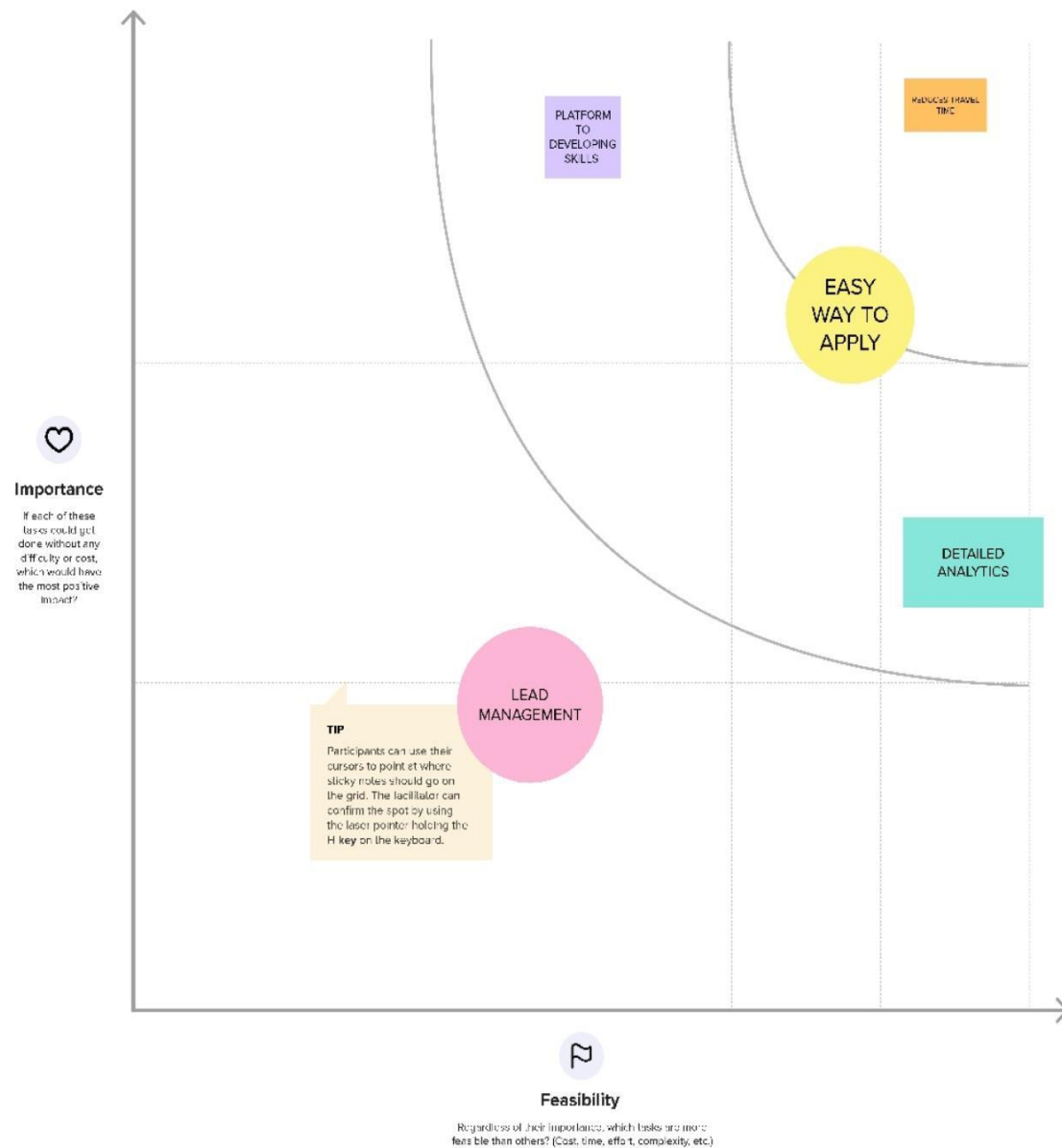
IMPROVED  
ENROLLMENT

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



# 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

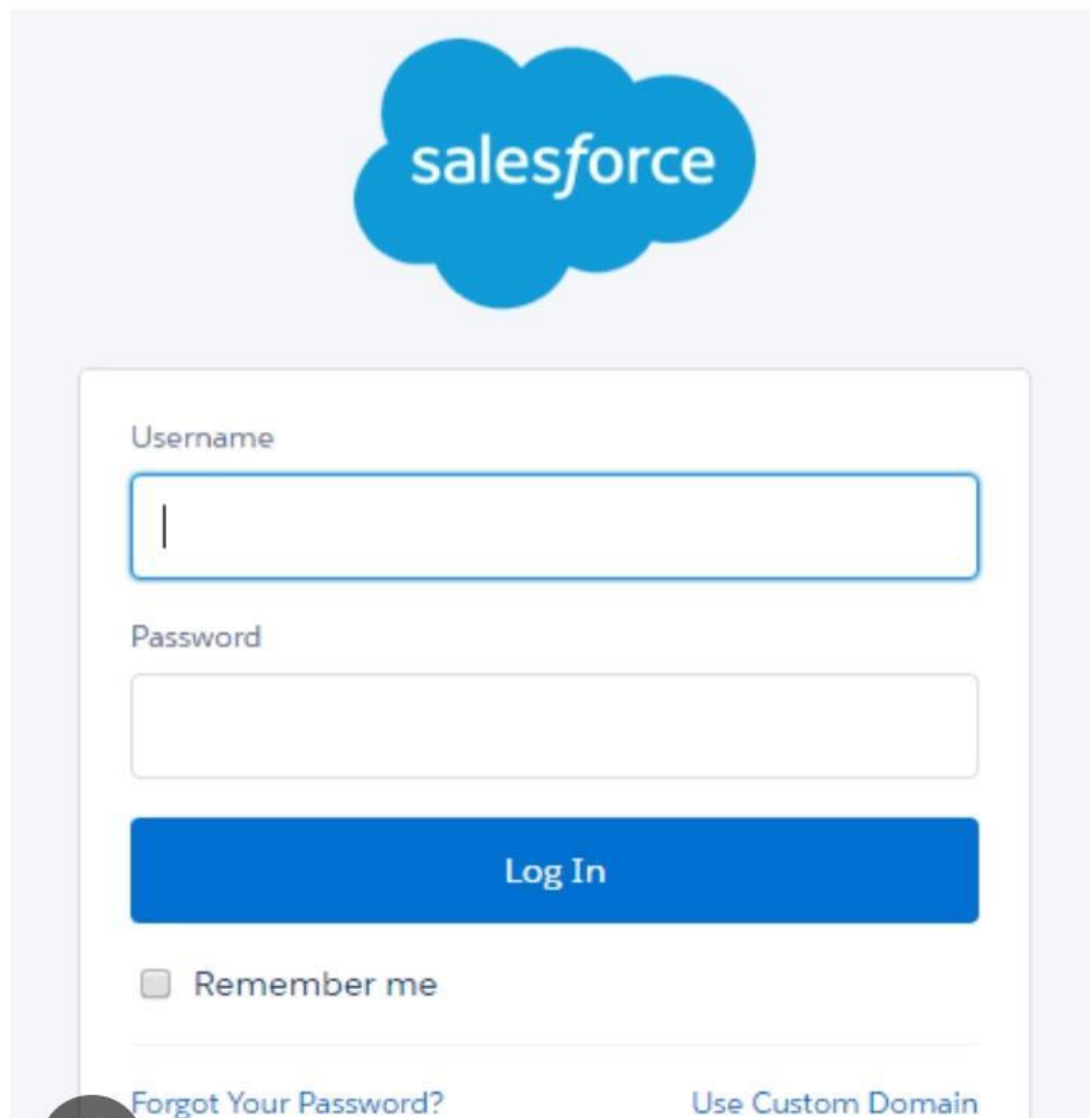


# ACTIVITY & SCREENSHOT

## Milestone-1:

### Introduction

#### DESCRIPTION:



A screenshot of the Salesforce login page. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white rectangular login form with a thin blue border. Inside the form, the label "Username" is positioned above a text input field that contains a single vertical line cursor. Below the username field is the label "Password" above an empty password input field. Underneath the password field is a solid blue rectangular button with the text "Log In" in white. Below the button is a checkbox with the text "Remember me" to its right. At the bottom of the form, there are two links: "Forgot Your Password?" on the left and "Use Custom Domain" on the right, both in a smaller blue font. The entire login form is centered on a light gray background.

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](mailto: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.

The image displays two screenshots of the Salesforce Object Manager interface, showing the configuration for two different objects: 'student' and 'kavitha'.

**Top Screenshot (Object: student):**

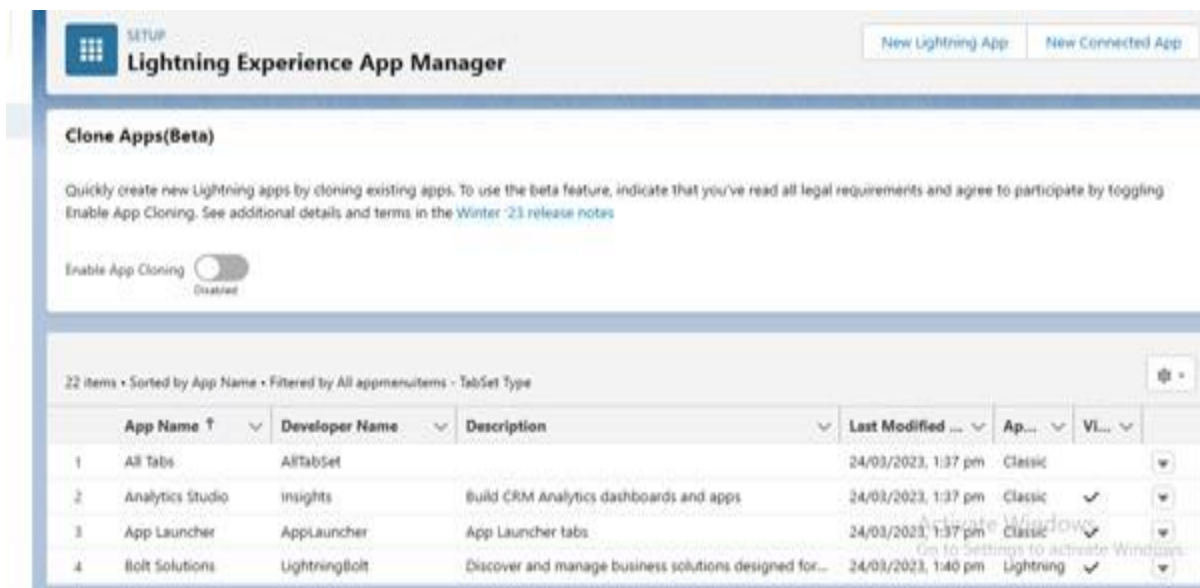
- Navigation:** Setup > Object Manager > student
- Left Sidebar (Details):**
  - Fields & Relationships
  - Page Layouts
  - Lightning Record Pages
  - Buttons, Links, and Actions
  - Compact Layouts
  - Field Sets
  - Object Limits
  - Record Types
  - Related Lookup Filters
  - Search Layouts
- Main Content Area (Details):**
  - Description:** (Empty text field)
  - API Name:** student\_\_c
  - Custom:** ☒
  - Singular Label:** student
  - Plural Label:** students
  - Enable Reports:** ☒
  - Track Activities:** ☐
  - Track Field History:** ☐
  - Deployment Status:** Deployed
  - Help Settings:** Standard salesforce.com Help Window
- Buttons:** Edit, Delete

**Bottom Screenshot (Object: kavitha):**

- Navigation:** Setup > Object Manager > kavitha
- Left Sidebar (Details):** (Same as top screenshot)
- Main Content Area (Details):**
  - Description:** (Empty text field)
  - API Name:** kavitha\_\_c
  - Custom:** ☒
  - Singular Label:** kavitha
  - Plural Label:** students
  - Enable Reports:** ☒
  - Track Activities:** ☐
  - Track Field History:** ☐
  - Deployment Status:** Deployed
  - Help Settings:** Standard salesforce.com Help Window
- Buttons:** Edit, Delete

## 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.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered, and the 'User Interface' section is expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a description of custom tabs and a table for 'Custom Object Tabs'. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. It lists four tabs: 'parents' (Chalkboard), 'parents' (Chalkboard), 'schools' (Book), and 'students' (Circle). Below the table, there is a section for 'Web Tabs' which states 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	parents	Chalkboard	
<a href="#">Edit</a>   <a href="#">Del</a>	parents	Chalkboard	
<a href="#">Edit</a>   <a href="#">Del</a>	schools	Book	
<a href="#">Edit</a>   <a href="#">Del</a>	students	Circle	

## **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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' entered and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column has checkboxes for each profile. The table lists various profiles like 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', and 'Custom Marketing Profile'. At the bottom, there is a pagination bar showing 'Page 1 of 2'.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Analytics Cloud Integration User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Analytics Cloud Security User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter External User</a>	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter Free User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter Moderator User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Contract Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Cross Org Data Proxy User</a>	XOrg Proxy User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Custom Marketing Profile</a>	Salesforce	<input type="checkbox"/>

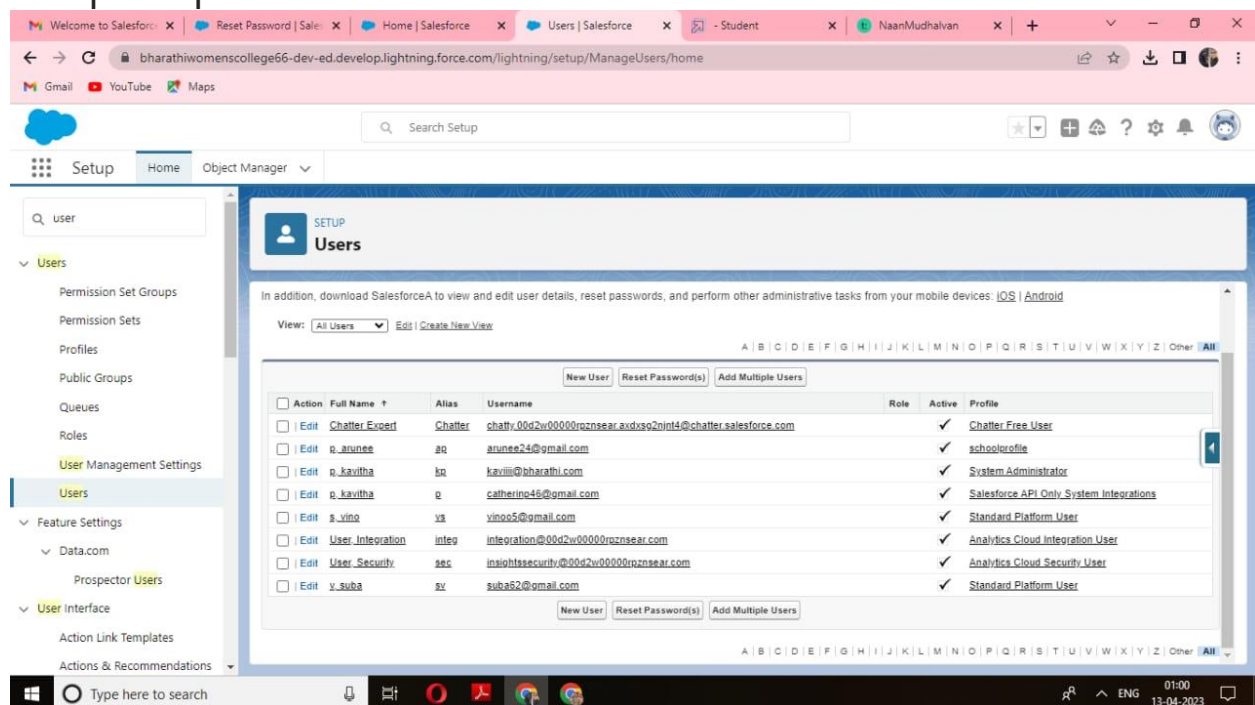
## Milestone-6: Users

## 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.

The screenshot displays the Salesforce Setup interface for Permission Sets. The left sidebar contains a search bar and a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and includes a description of the page's functionality. Below the description is a table listing existing permission sets.

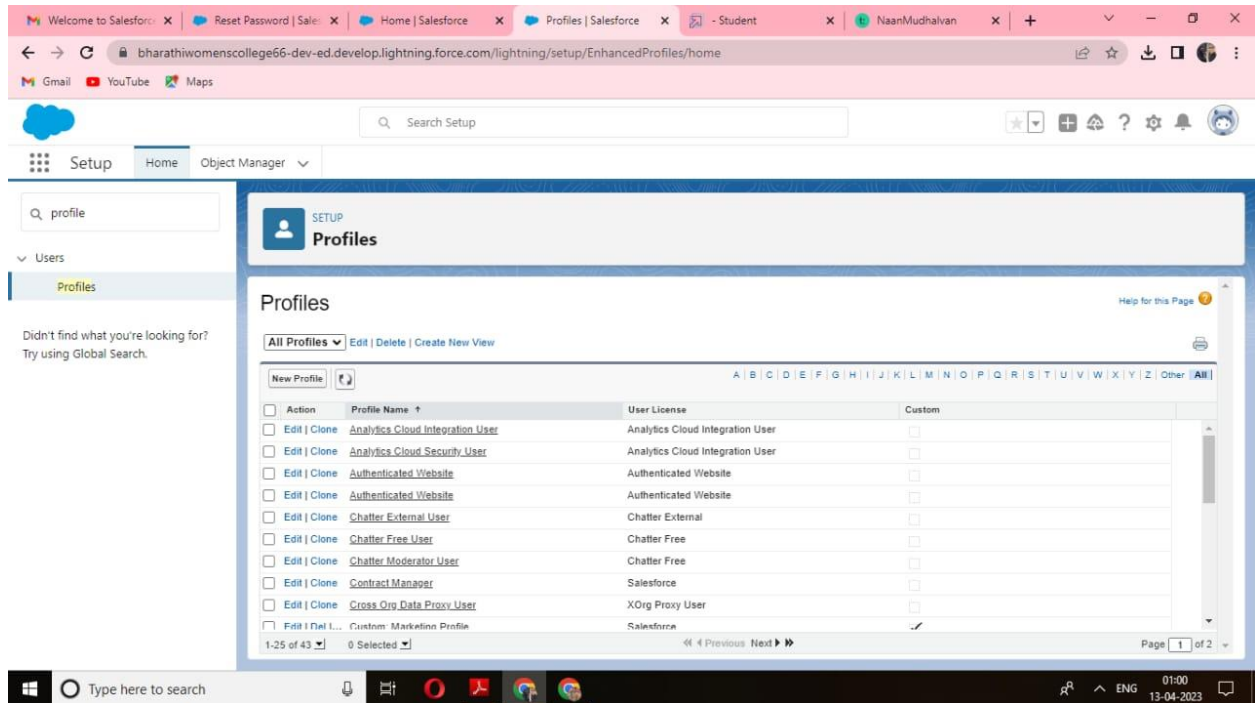
Action	Permission Set Label	Description	License
<a href="#">Clone</a>	<a href="#">Buyer</a>	Allows access to the store. Lets users see produc...	B2B Buyer Permission Set One Seat
<a href="#">Clone</a>	<a href="#">Buyer Manager</a>	Includes all Buyer capabilities, and allows access...	B2B Buyer Manager Permission Set One Seat
<a href="#">Clone</a>	<a href="#">CRM User</a>	Denotes that the user is a Sales Cloud or Service...	CRM User
<a href="#">Clone</a>	<a href="#">Commerce Admin</a>	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<a href="#">Del</a>   <a href="#">Clone</a>	<a href="#">Delete Accounts</a>	Grants Delete Accounts permission	Salesforce Platform

## 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