A CRM APPLICATION FOR SCHOOLS/ COLLEGES.

SUBMITTED BY:

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PROJECT REPORT TEMPLATE

1. INTRODUCTION:

1.1. Overview:

This project is on the topic "A CRM Application for Schools/Colleges". CRM refers to Customer Relationship Management. The objective of this project is to optimize the performance of sales and marketing team and to build customer service relationships. CRM is a great way to track and nurture relationships with prospective students.

1.2. Purpose:

The purpose of this project is to manage and improve business relationships. It helps with contact management, sales management and profitability. This project also helped us to develop new applications. It also helped us to gain knowledge on many new apps such as mural, trailhead, etc.,

2. PROBLEM DEFINITION & DESIGN THINKING:

Problem Definition:

A concise description of the problem a project seeks to address. It is done using Ideation and Idea Prioritization.

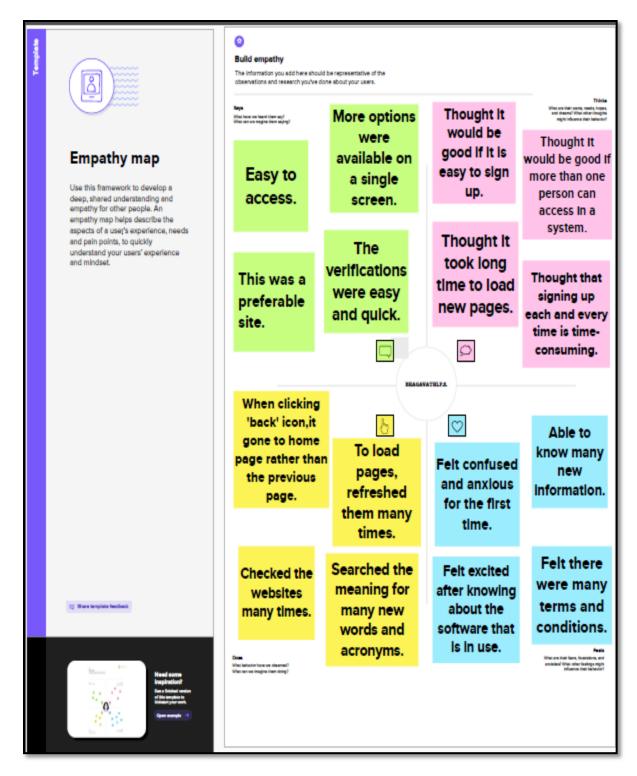
Design Thinking:

It is a process for solving problems by prioritizing the consumer's needs. Design thinking process can be articulated in five steps.

- Empathize
- Define
- Ideate
- Prototype
- Test

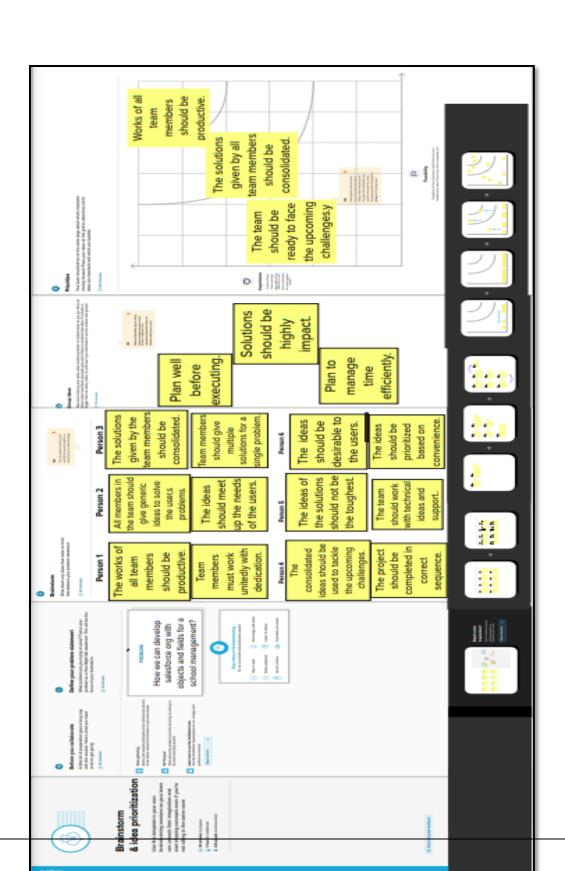
2.1. EMPATHY MAP:

An empathy Map is a square divided into four quadrants with the user or client in the middle. The four empathy map quadrants look at what the user says, thinks, feels and does. It helps teams to better understand their users. Empathy map helps build empathy towards users and helps design teams shift focus from the product to the users who use the products.



2.2. IDEATION AND BRAINSTORMING:

Ideation is a specific technique that is utilized to generate new ideas. A principal difference between ideation and brainstorming is that ideation is commonly being an individual pursuit, while brainstorming is almost a group activity.



3. RESULT:

3.1. Data Model:

Object Name	Fields in the object	
	Field label	Data type
Object-1: School	Address	Text Area
	District	Text Area
	Phone Number	Phone
Object-2: Student	Field label	Data type
	Results	Pick list
	Class	Number
	Marks	Number
Object-3: Parent	Field label	Data type
	Parent Address	Text Area
	Parent Number	Phone

3.2. ACTIVITY & SCREENSHOT:

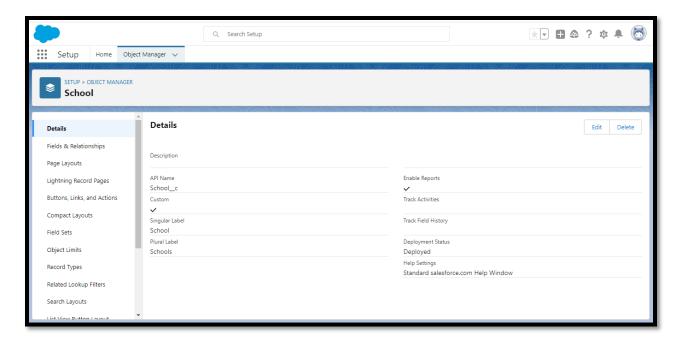
Attaching the screenshots of the project "A CRM Applications for Schools and Colleges" along with description.

MILESTONE-2: OBJECT

Creation of objects for School Management:

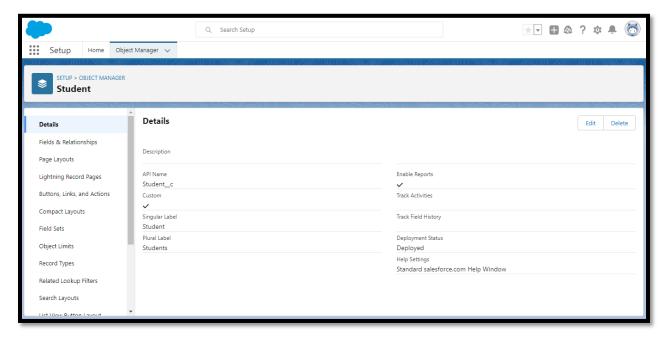
ACTIVITY-1:

Creation of School object:



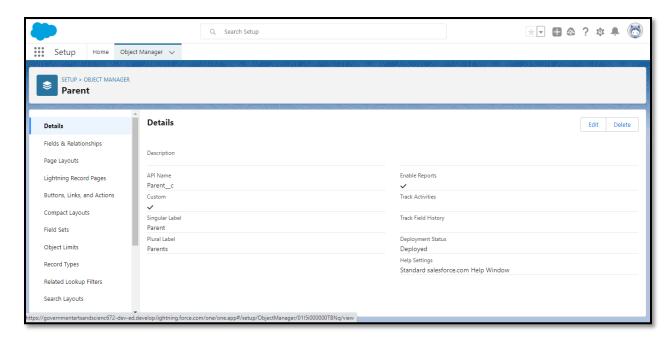
ACTIVITY-2:

Creation of Student object:



ACTIVITY-3:

Creation of Parent object:



MILESTONE-3: LIGHTNING APP

ACTIVITY-1

Creation of School Management App:

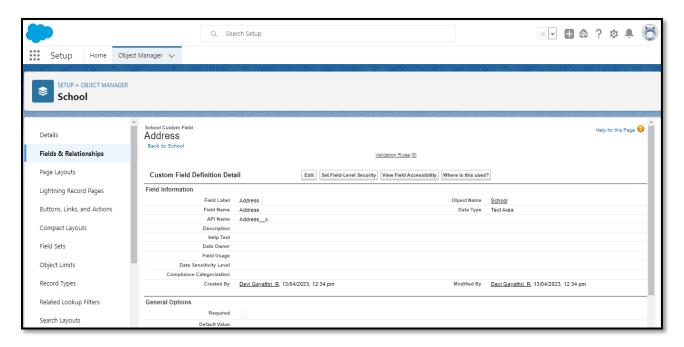
New Lightning App App Details & Branding Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar. App Details App Branding *App Name 🕕 Primary Color Hex Image 🚯 Value 🚯 School Management **■** #0070D2 * Developer Name 1 **⚠** Upload Devi Description 1 Schools, Students, Reports, Dashboards Org Theme Options Use the app's image and color instead of the org's custom theme App Launcher Preview School Management SM Schools, Students, Reports, Dashboards

MILESTONE-4: FIELDS AND RELATIONSHIPS

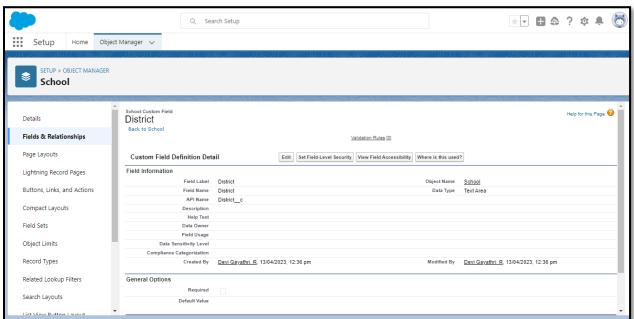
ACTIVITY-1

Creation of fields for the School objects:

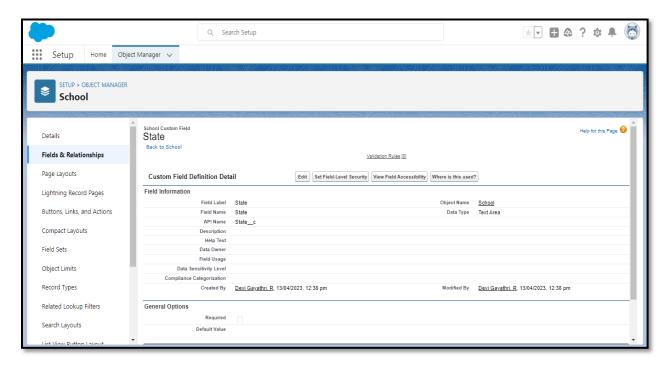
Address:



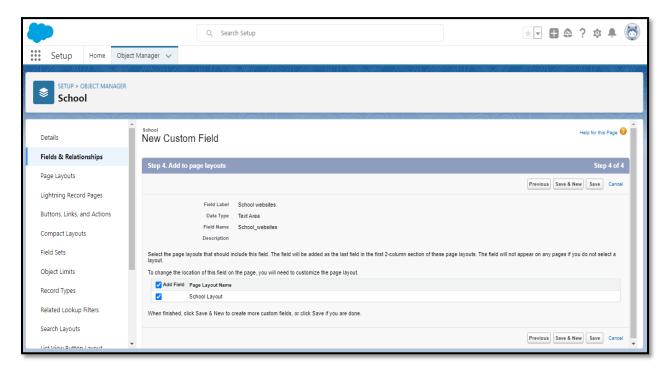
District:



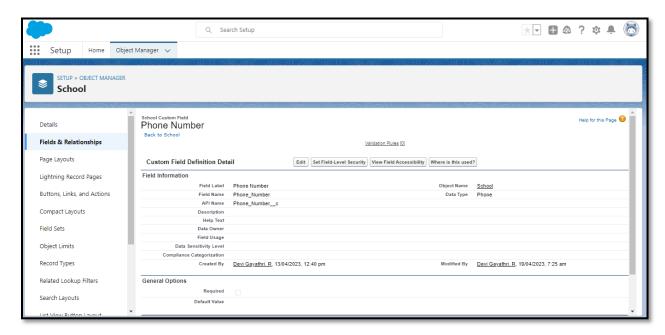
State:



School websites:

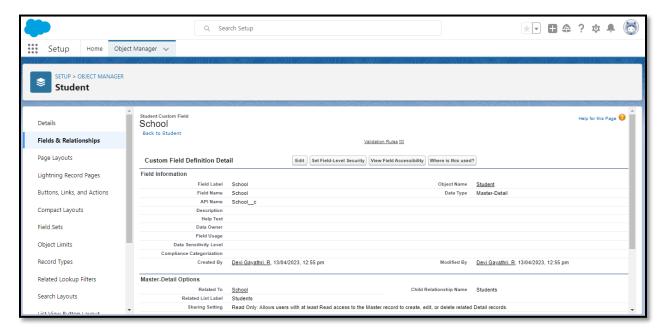


Phone Number:

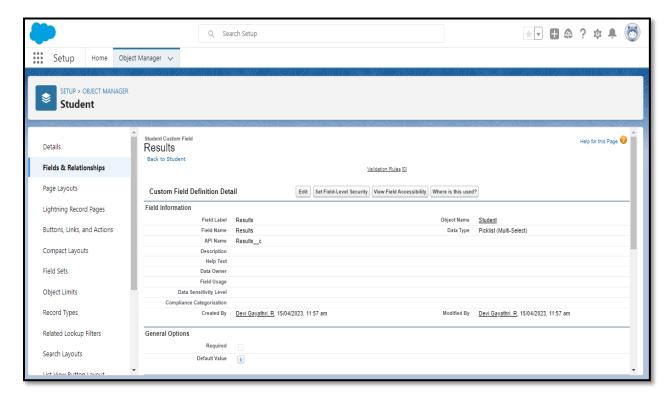


ACTIVITY-2:

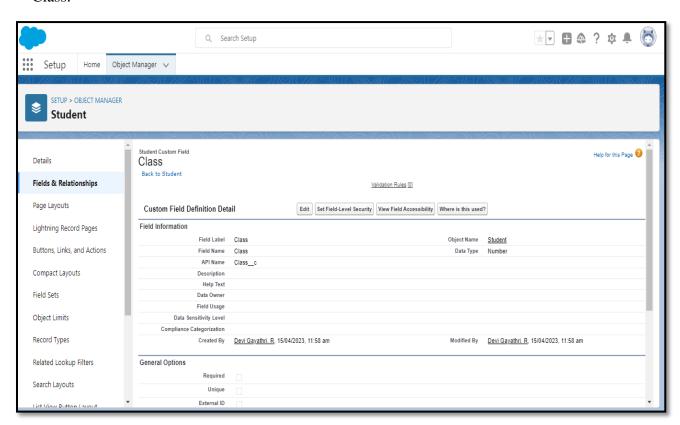
Creation of Fields for Student object:



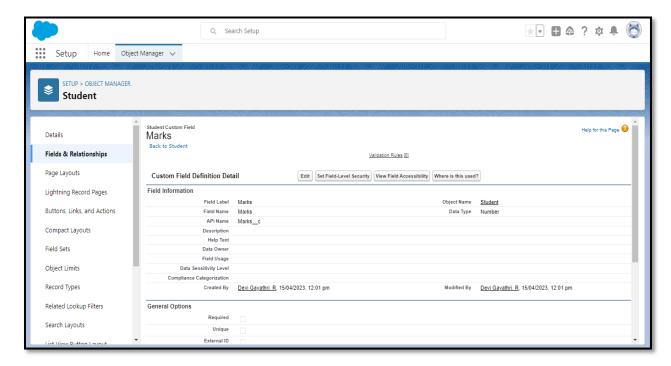
Results:



Class:



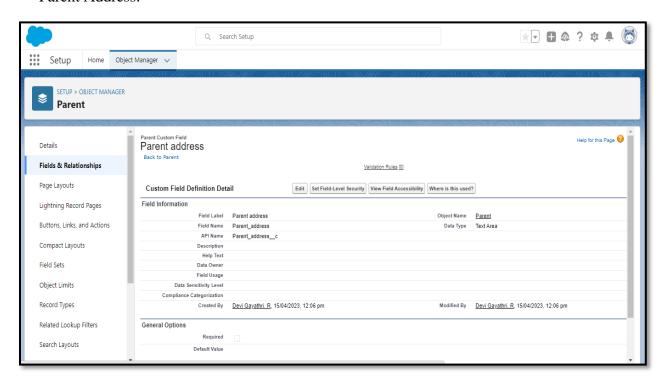
Marks:



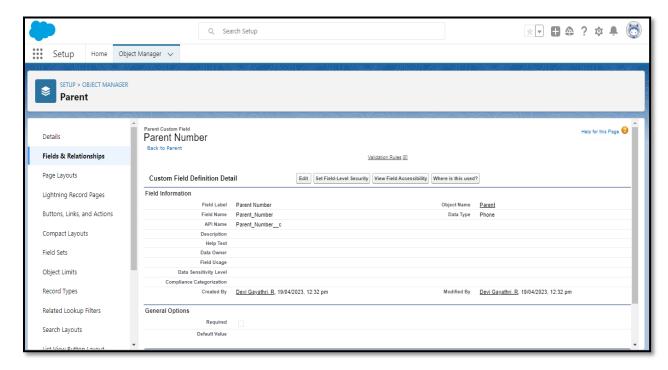
ACTIVITY-3:

Creation of Fields for Parent Object:

Parent Address:



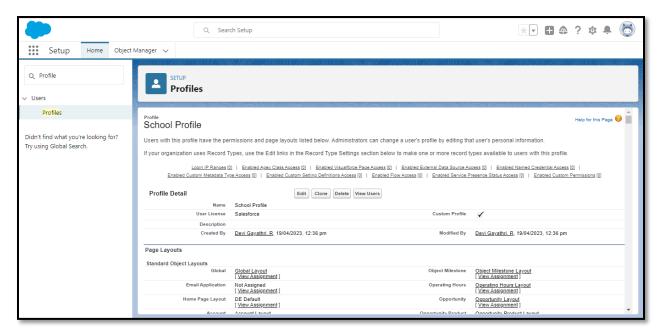
Parent Number:



MILESTONE-5: PROFILE

ACTIVITY:

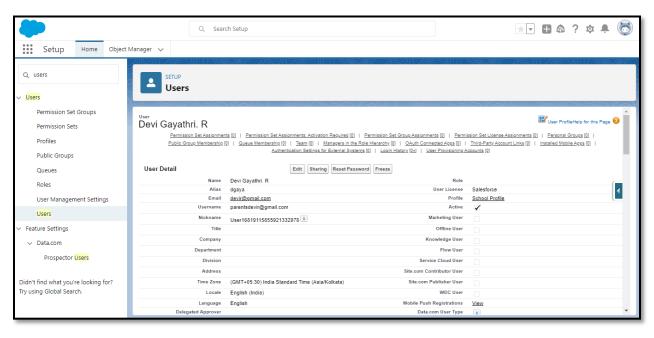
Creation on profile:

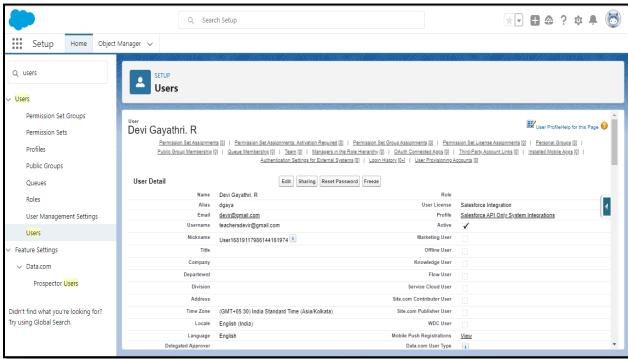


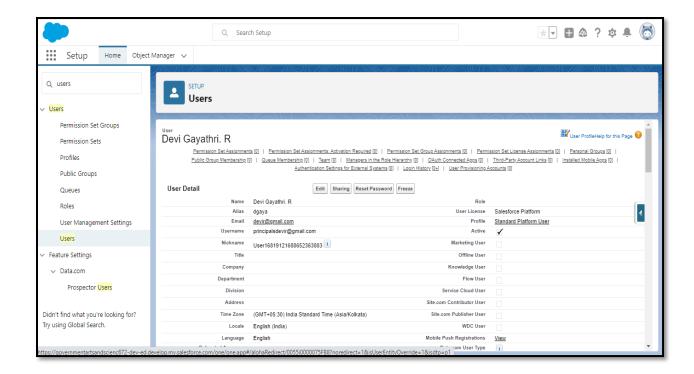
MILESTONE-6: USERS

ACTIVITY:

Creating the Users:



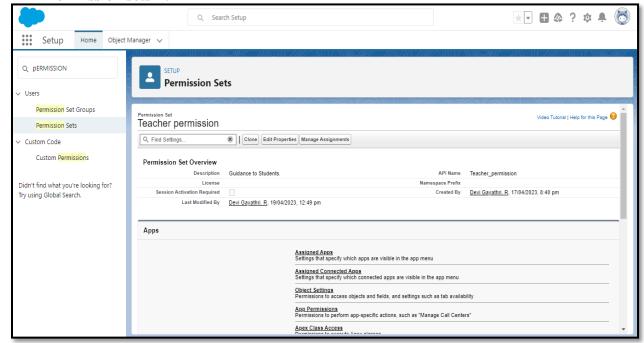




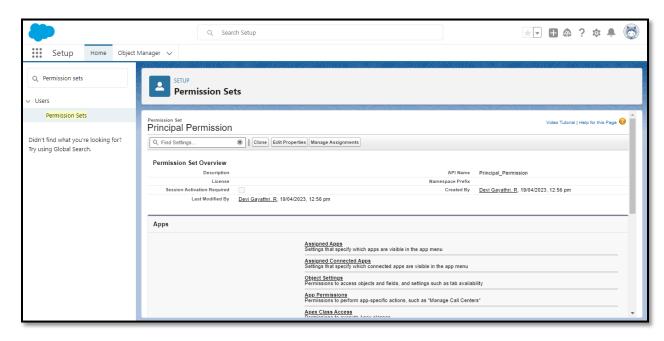
MILESTONE-7: PEMISSION SETS

ACTIVITY-1:

Permission sets-1:



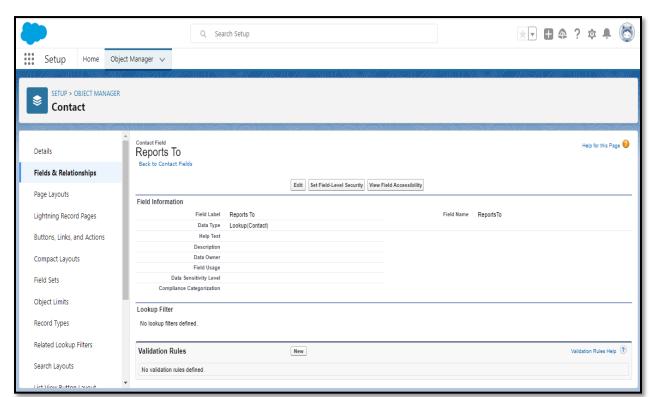
Permission Sets-2:



MILESTONE-8: REPORTS

ACTIVITY:

Reports:



4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead - https://trailblazer.me/id/dgayathrir

Team Member 1- https://trailblazer.me/id/bhaps1

Team Member 2- https://trailblazer.me/id/divym22

Team Member 3- https://trailblazer.me/id/harie33

Team Member 4- https://trailblazer.me/id/jerin43

Team Member 5- https://trailblazer.me/id/lokic3

5. ADVANTAGES & DISADVANTAGES:

List of advantages and disadvantages of the proposed solution.

ADVANTAGES	DISADVANTAGES
Learnt about Customer Relationship Management and understood the concept.	There were problems in login and signup processes.
 Helps to develop applications which will be useful for our career. 	There was Internet problem.
 Learnt on Project Development Process and got many experiences. 	 Did not have sufficient time to complete the project.
 Experience on creating Empathy map and Brainstorming. 	 There was problem with arrival of verification code in mail.
Useful to develop our skills thereby creating job opportunities.	Most of the students doesn't have laptop or system to complete their project.

6. APPLICATIONS:

- It helps to maintain the records of Schools/Colleges.
- It helps to maintain a good relationship with customers.
- It helps to create many new applications.
- Useful in cloud computing.
- It helps to identify sales opportunities, record service issues and manage marketing campaigns.

7. CONCLUSION:

This project helps us improve knowledge on app development. It helps to develop our skills thereby improving our job opportunities. This will be a good guidance for career.

A great thanks to the "NAAN MUDHALVAN" team and "SALESFORCE" team for giving this opportunity to learn a lot of new information from this project.

8. FUTURE SCOPE:

In this digitalized world, we must have the knowledge of computer. This project paved a way to know more about computer as well as app development.

As Salesforce helps to integrate data science and big data capabilities to its Service Cloud and Marketing Cloud. This would result in automated customer service tasks via Service Cloud and would let marketers leverage data for predictive and targeted marketing via Marketing Cloud.