

PROJECT REPORT TEMPLATE

CRM APPLICATION FOR SCHOOL/COLLEGES.

1. INTRODUCTION:

1.1 Overview:

Customer Relationship Management enables educational institutions such as school, colleges to manage relationships with students, parents, staff, alumni and other stakeholders.

1.2 Purpose:

- ❖ Student information management.
- ❖ Enrollment tracking.
- ❖ Academic progress tracking.
- ❖ Communication tools.
- ❖ Event management.
- ❖ Fundraising management.
- ❖ Reporting tools.

2. PROBLEMS DEFINITION & DESIGN THINKING:

2.1 Empathy Map:



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

Share template feedback

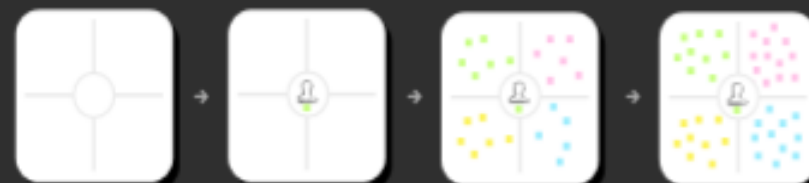


Need some inspiration?
See a finished version of this template in between your work.



Build empathy

The information you add here should be representative of the observations and research you've done about your users.



3.RESULTS:

[illegible]

3.1 Data Model:

S.NO	FIELD NAME	DATA TYPE
1.	Address	Text area
2.	Phone number	Phone
3.	Number of theory	Role of summary
4.	Highest marks	Role of summary
5.	School	Master-details relationship
6.	Results	Picklist
7.	Class	Number
8.	Parent address	Text area
9.	Parent number	Phone

3.2 Activity & Screenshot:

Step 1: Object

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

School:

The screenshot shows the Salesforce Object Manager for the 'school' object. The left sidebar contains a 'Details' menu with 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 area displays the 'Details' for the 'school' object, including fields like API Name (school__c), Singular Label (school), and Plural Label (schools). It also shows settings for Enable Reports, Track Activities, Track Field History, Deployment Status, and Help Settings.

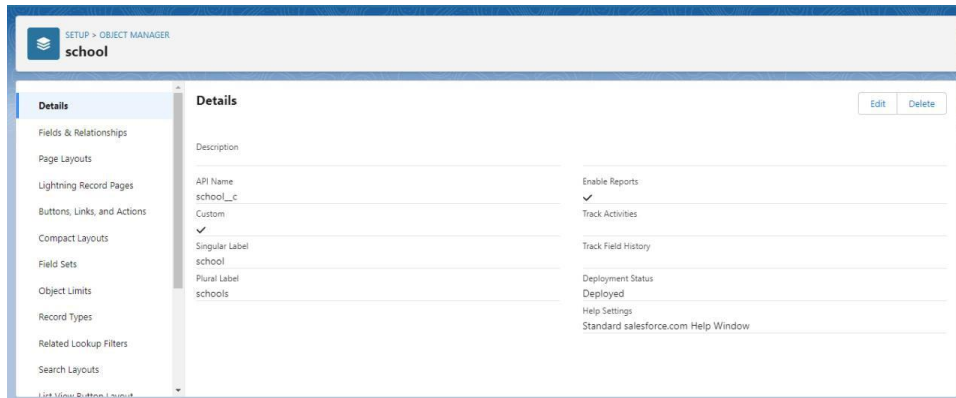
Field	Value
Description	
API Name	school__c
Custom	✓
Singular Label	school
Plural Label	schools
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Parents:

The screenshot shows the Salesforce Object Manager for the 'parent' object. The left sidebar contains a 'Details' menu with 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 area displays the 'Details' for the 'parent' object, including fields like API Name (parent__c), Singular Label (parent), and Plural Label (parents). It also shows settings for Enable Reports, Track Activities, Track Field History, Deployment Status, and Help Settings.

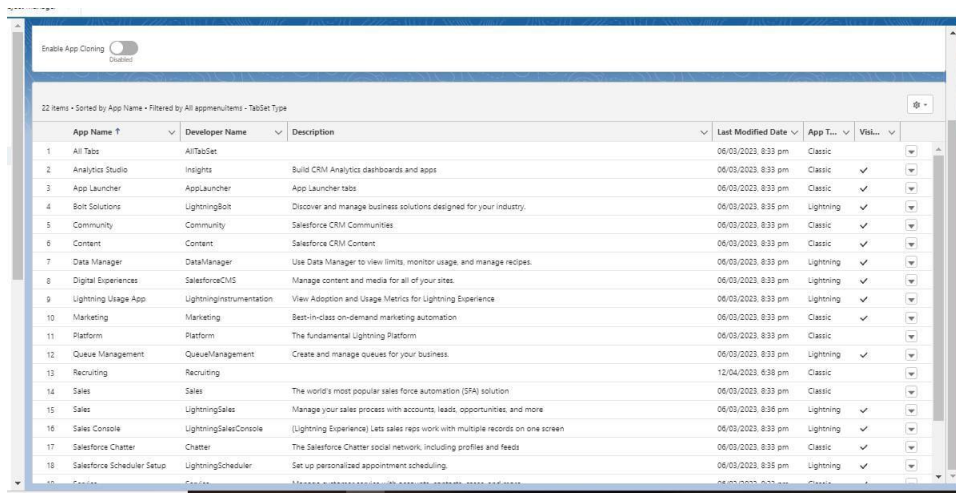
Field	Value
Description	
API Name	parent__c
Custom	✓
Singular Label	parent
Plural Label	parents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Students:



Step 2: Lightning app

Apps in salesforce are a groups of tabs that helps the application function by working together as a unit. It has a name, a logo and a particular set of tabs.



Step 3: Field & Relationship

School:

SETUP > OBJECT MANAGER

school

Details

Fields & Relationships

19 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
address	address__c	Text Area(255)		
class	class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
district	districts__c	Text Area(255)		
district	district__c	Text Area(255)		
Highest mark	Highest_mark__c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
marks	marks__c	Number(18, 0)		

List View, Buttons, Layouts

Student:

SETUP > OBJECT MANAGER

students

Details

Fields & Relationships

4 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
students Name	Name	Text(80)		✓

List View, Buttons, Layouts

Parents:

SETUP > OBJECT MANAGER

parent

Details

Fields & Relationships

4 Items, Sorted by Field Label

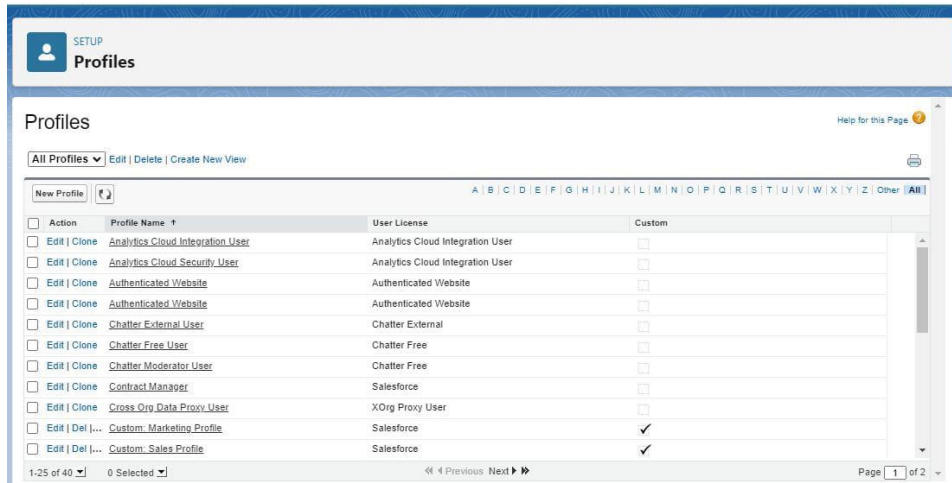
Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
parent Name	Name	Text(80)		✓

List View, Buttons, Layouts

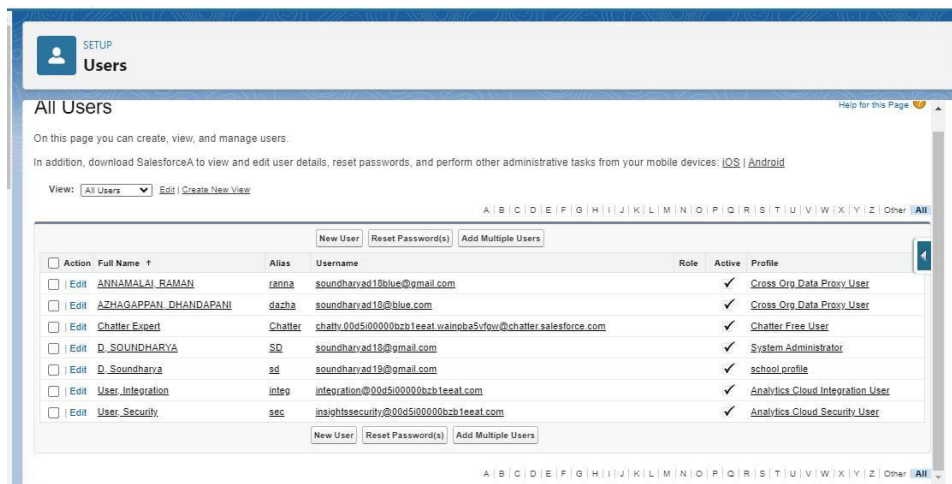
Step 4: Profile

A Profile is a group/collection of settings and permission that define what a user can do in Salesforce.



step 5: Users

A User is anyone who logs in Salesforce. Every user in Salesforce has a user account.



Step 6: Permissions sets

A Permission set is a collection of settings and permission that give users access to various tools and functions.

SETUP

Permission Sets

Permission Sets

Help for this Page

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets

Edit | Delete | Create New View

New

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
Del Clone	Experience Profile Manager		Salesforce
Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloca...	Facility Manager

Step 7:Reports

A reports is a list of records that meet the criteria you define.

Report Name	Description	Folder	Created By	Created On	Subscribed
CRM application for school/colleges		Private Reports	SOUNDHARYA D	12/4/2023, 2:28 pm	
Copy of New schools Report		Private Reports	SOUNDHARYA D	12/4/2023, 2:22 pm	
school reports		Private Reports	SOUNDHARYA D	12/4/2023, 2:26 pm	

Report: Accounts

CRM application for school/colleges

Enable Field Editing

Q

Add Chart

Y

Edit

Total Records

12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	SOUNDHARYA D	GenePoint	CA	Customer - Channel	Cold	12/04/2023
2	-	SOUNDHARYA D	United Oil & Gas, UK	UK	Customer - Direct	-	12/04/2023
3	-	SOUNDHARYA D	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	12/04/2023
4	-	SOUNDHARYA D	Edge Communications	TX	Customer - Direct	Hot	12/04/2023
5	-	SOUNDHARYA D	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	12/04/2023
6	-	SOUNDHARYA D	Pyramid Construction Inc.	-	Customer - Channel	-	12/04/2023
7	-	SOUNDHARYA D	Dickenson plc	KS	Customer - Channel	-	12/04/2023
8	-	SOUNDHARYA D	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	12/04/2023
9	-	SOUNDHARYA D	Express Logistics and Transport	OR	Customer - Channel	Cold	12/04/2023
10	-	SOUNDHARYA D	University of Arizona	AZ	Customer - Direct	Warm	12/04/2023
11	-	SOUNDHARYA D	United Oil & Gas Corp.	NY	Customer - Direct	Hot	12/04/2023
12	-	SOUNDHARYA D	sForce	CA	-	-	12/04/2023

4.TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD: <https://trailblazer.me/id/sound162>

TEAM MEMBER 1: <https://trailblazer.me/id/madhanmalai>

TEAM MEMBER 2: <https://trailblazer.me/id/thank57>

TEAM MEMBER 3: <https://trailblazer.me/id/gunad9>

5.ADVANTAGES:

- ❖ Improving the organization management process.
- ❖ Improved students admissions life cycle .
- ❖ Track students life styles within the institution.

6.DISADVANTAGES:

- ❖ Issues with uploading materials.
- ❖ The software is so complex that it can be difficult to perform simple tasks.

7.APPLICATIONS:

- ✓ Collecting student feedback.

- ✓ Managing school events.
- ✓ Managing alumni connecting.

8.CONCLUSION:

We may conclude that mentioning CRM application for school / colleges helps to improving admission process, managing school events .And improvement of the student relationship with the institute.