

REPORT FOR A CRM APPLICATION FOR SCHOOLS AND COLLEGES

1 INTRODUCTION

1.1 Overview

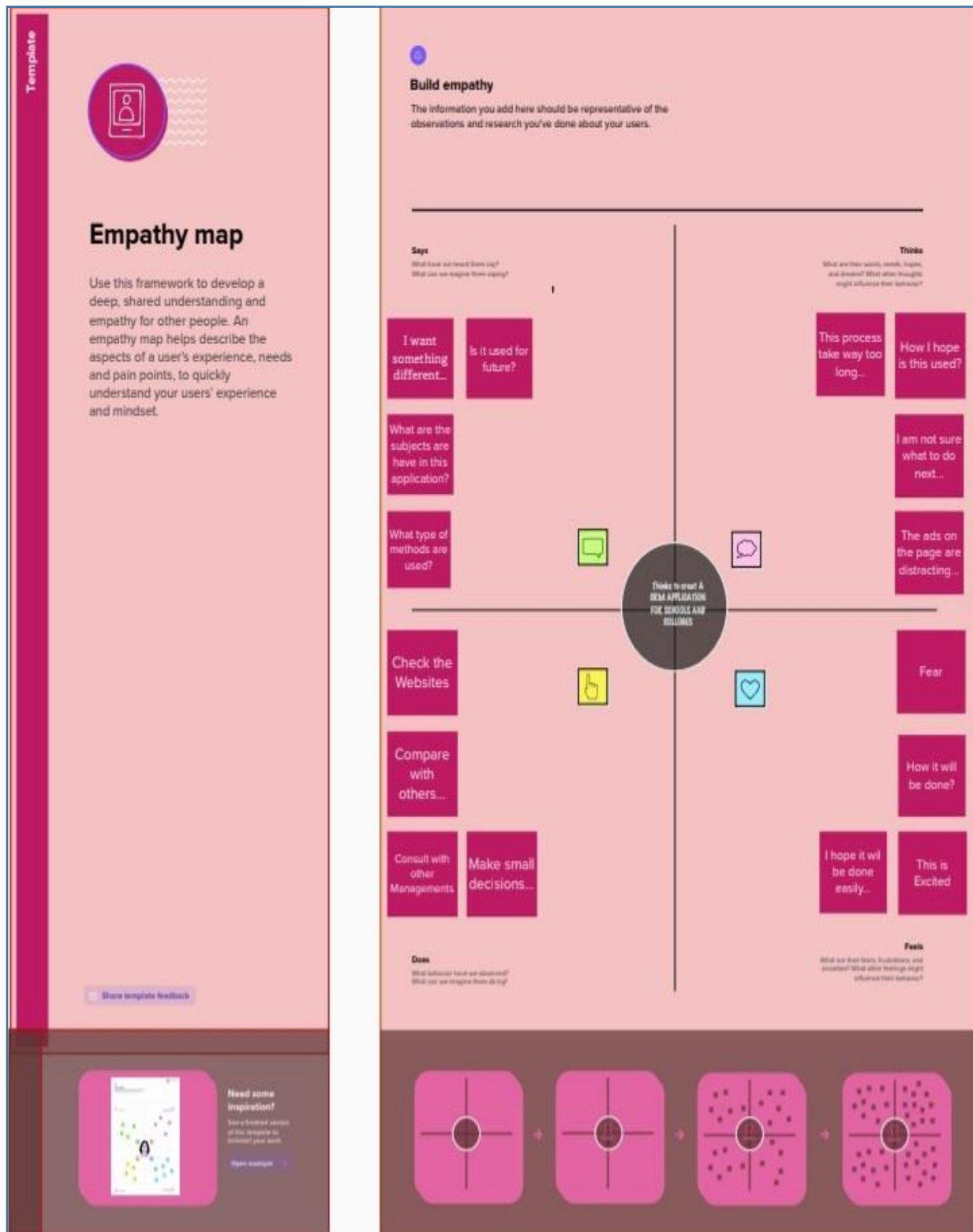
Schools use CRM systems to manage admission processes (follow-ups, open houses, grants, etc.), marketing communications, and automate admission workflows.

1.2 Purpose

Simply Increase your Conversion Rate by 200% using the Best CRM for Educational Institutes. Automation Nurturing of Applicants to Admissions helps you to increase the closure by 200% Free Setup & Training. Education Specific CRM. Zero Missed Follow-ups.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming

Brainstorm & Idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

Worksheet in progress
4 steps to ideation
2.8 people contributed

Before you collaborate

It takes time to generate ideas. It takes time to get going. It takes time to get going.

Brainstorm

What problem are you trying to solve? Define your problem as a clear, brief statement. This will be the focus of your brainstorm.

Person 1

They want Name list about students

Automate your admission process

Also a form commonly have students parents details

Hostal facilities are filled an application

What are the methods are used to conduct a class were included of an application

Person 2

What department or what course students can select is important

Student Adresses is important

Students Marks list was must

Students Register number or other identify cards are must

Parents teacher communication is must

Time schedule is must

Person 3

Person 4

Group ideation

Take some thinking time. Then start sharing ideas in related notes so you get ideas of other notes. Then group your ideas into a solution. The idea is a solution to a problem. Then start sharing ideas in related notes so you get ideas of other notes.

Prioritize

Your team should sit on the same page about what's important. Moving forward. Please your ideas on this grid to determine which ideas are **important** or which are **feasible**.

After you collaborate

You can export the notes as an image or pdf. It shows all members of your company with important notes.

Build solutions

Keep working forward

3 RESULT

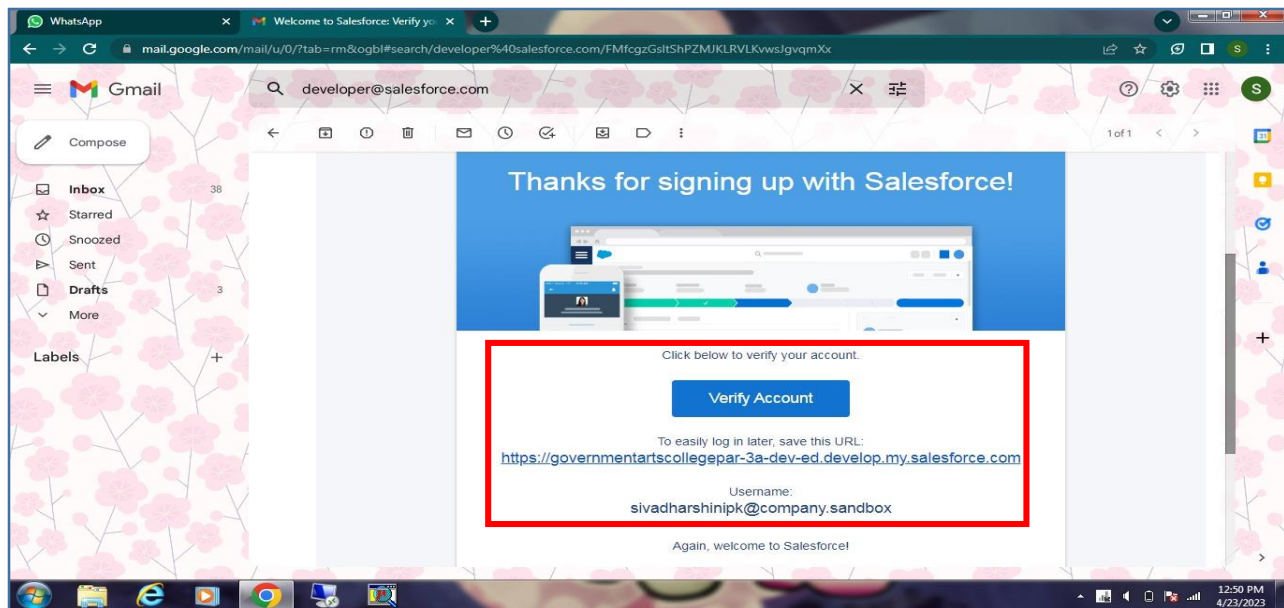
3.1 Data Model:

Object Name	Fields in the Object	
School object	Field label	Data type
	Address	Area
	Phone Number	Phone
Student Object	Field label	Data type
	Phone Number	Phone
	School	Master-Detail Relationship
Parent Object	Field label	Field label
	Parent Address	Text Area
	Parent Number	Phone

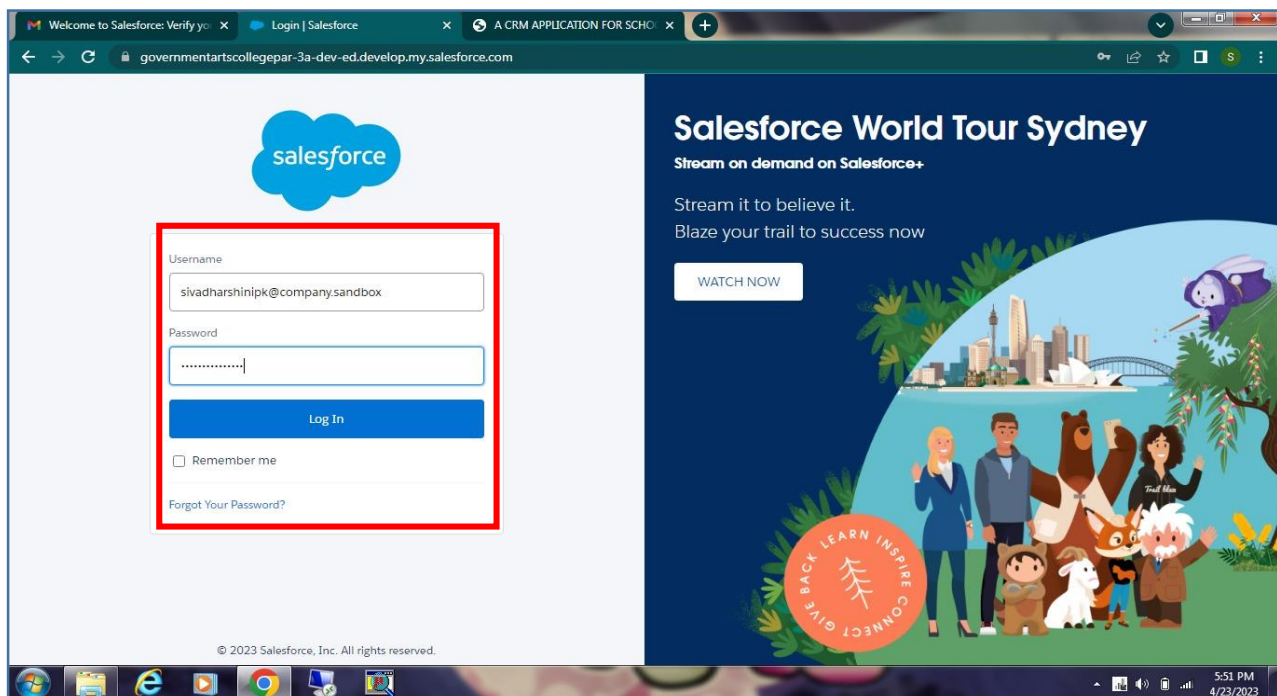
3.2 Activity & Screenshot

Milestone-1:

Activity : Creating Developer Account



Login To Your Salesforce Account



Milestone-2:Object

Activity-1: Creation of School Object

The screenshot shows the Salesforce Setup interface for creating a custom object named 'School'. The left sidebar lists various setup options, with 'Object Manager' selected. The main content area is titled 'Edit Custom Object School' and contains the 'Custom Object Definition Edit' form. The 'Custom Object Information' section is highlighted with a red box, showing the 'Label' field set to 'School' and the 'Plural Label' field set to 'Schools'. The 'Object Name' field is also set to 'School'. The 'Description' field is empty. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'.

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

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name as it affects 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

Save Save & New Cancel

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Create Tabs for School Object

The screenshot shows the Salesforce Setup interface for creating a custom tab for the 'Schools' object. The left sidebar lists various setup options, with 'Tabs' selected. The main content area is titled 'Edit Custom Object Tab Schools' and contains the 'Custom Tab Definition Edit' form. The 'Custom Object Tab Information' section is highlighted with a red box, showing the 'Tab Label' field set to 'Schools' and the 'Object' field set to 'School'. The 'Tab Style' field is set to 'Flag'. The 'Splash Page Custom Link' is set to 'None'. The 'Description' field is empty. The 'Save' and 'Cancel' buttons are at the bottom.

mail.google.com Welcome to Salesforce: Verify yo... Tabs | Salesforce WhatsApp

governmentartscollegepar-3a-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5i000000v7Kk%2Fe%3FretURL%3D%252Fsetup%...

Setup Home Object Manager

Search Setup

Setup Tabs

Edit Custom Object Tab Schools

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Schools Example: Account

Object: School Example: Accounts

Tab Style: Flag

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description

Save Cancel

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Activity 2: Create student object

The screenshot shows the Salesforce Setup interface for creating a custom object named "Student". The left sidebar lists various setup options, with "Object Manager" selected. The main content area is titled "Edit Custom Object Student". Under "Custom Object Information", the "Label" field is set to "Student" and the "Plural Label" is set to "Students". Both fields are highlighted with a red box. The "Object Name" field is also set to "Student". The "Description" field is empty. The "Context-Sensitive Help Setting" is set to "Open the standard Salesforce.com Help & Training window".

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
- List View Button Layout

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name of a custom object. Integrations and merge templates.

Label: Student Example: Account

Plural Label: Students Example: Accounts

Starts with vowel sound ☐

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

Object Name: Student Example: Account

Description

Context-Sensitive Help Setting

- ☒ Open the standard Salesforce.com Help & Training window
- ☐ Open a window using a Visualforce page

Create Tabs for Student Object

The screenshot shows the Salesforce Setup interface for creating a custom tab for the "Students" object. The left sidebar lists various setup options, with "User Interface" selected. The main content area is titled "Edit Custom Object Tab Students". Under "Custom Tab Definition Edit", the "Tab Label" is set to "Students" and the "Object" is set to "Student". Both fields are highlighted with a red box. The "Tab Style" is set to "Books". The "Splash Page Custom Link" is set to "--None--". The "Description" field is empty.

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Setup > Tabs

Search Setup

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Students Example: Account

Object: Student Example: Account

Tab Style: Books

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description

Activity 3: Create parent object

The screenshot shows the Salesforce Setup interface for creating a custom object named "Parent". The left sidebar lists various setup options, with "Details" selected. The main content area is titled "Edit Custom Object: Parent". It contains a "Custom Object Definition Edit" section with a "Custom Object Information" sub-section. The "Label" field is set to "Parent" and the "Plural Label" field is set to "Parents", both highlighted with a red box. The "Object Name" field is also set to "Parent". The "Description" field is empty. The "Context-Sensitive Help Setting" is set to "Open the standard Salesforce.com Help & Training window".

Setup > OBJECT MANAGER
Parent

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

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name of a custom object. Integrations and merge templates. Example: Account

Label: Parent

Plural Label: Parents

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API. Object Name: Parent Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Create Tabs for Parent Object

The screenshot shows the Salesforce Setup interface for creating a custom tab for the "Parents" object. The left sidebar lists various setup options, with "User Interface" selected. The main content area is titled "Edit Custom Object Tab: Parents". It contains a "Custom Tab Definition Edit" section with a "Custom Object Tab Information" sub-section. The "Tab Label" field is set to "Parents" and the "Object" field is set to "Parent", both highlighted with a red box. The "Tab Style" field is set to "Form". The "Splash Page Custom Link" is set to "--None--". The "Description" field is empty.

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Setup > Tabs

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Parents

Object: Parent

Tab Style: Form

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

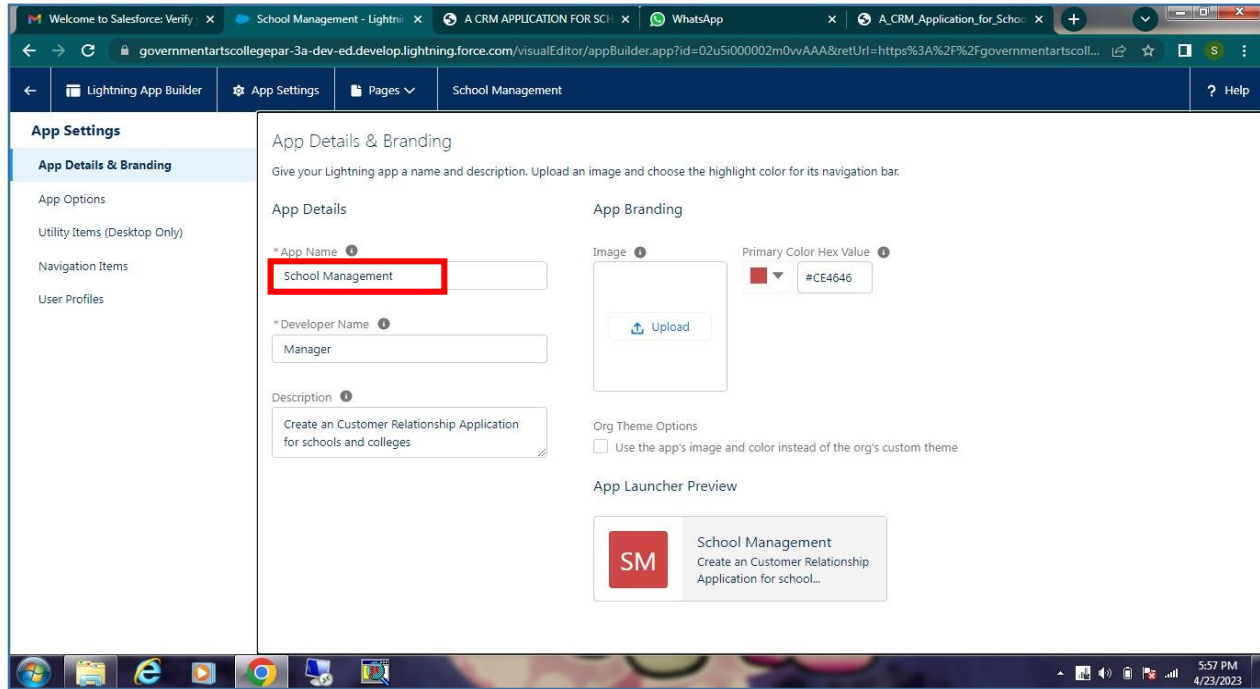
Splash Page Custom Link: --None--

Enter a short description.

Description:

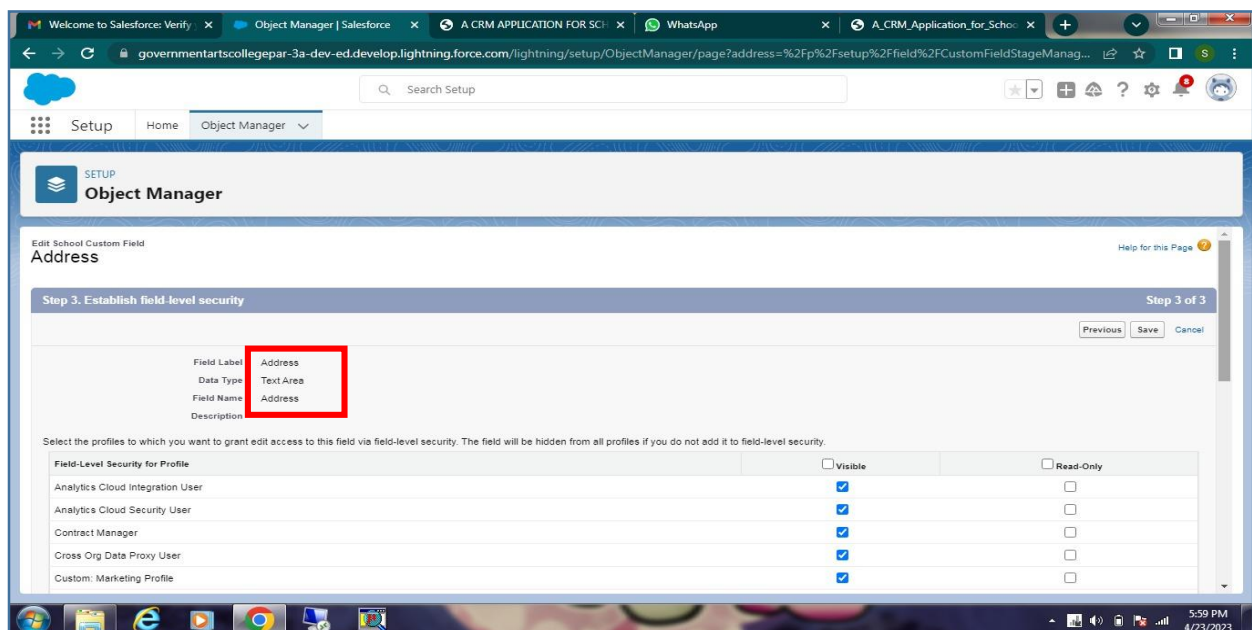
Milestone-3: Lightning App

Create the School Management app



Milestone -4: Fields and Relationship

Activity 1: Creation of fields for the School objects:



Setup > OBJECT MANAGER
School

Details

Fields & Relationships
7 Items, Sorted by Field Label

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)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Master	Master__c	Master-Detail(School)		✓
Phone Number	Phone_Number__c	Phone		
School	School__c	Text Area(255)		
School Name	Name	Text(80)		✓

Activity 2: Creation of fields for the Student objects:

Setup > OBJECT MANAGER
Object Manager

Edit Student Custom Field
Phone Number

Step 3. Establish field-level security

Previous Save Cancel

Field Label	Phone Number
Data Type	Phone
Field Name	Phone_Number
Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Setup > OBJECT MANAGER

Student

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Phone Number	Phone_Number__c	Phone		
Result	Result__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

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Activity 3: Creation of fields for the Parent objects:

Setup > OBJECT MANAGER

Object Manager

Edit Parent Custom Field

Parent Number

Help for this Page

Step 3. Establish field level security

Previous Save Cancel

Field Label: Parent Number

Data Type: Phone

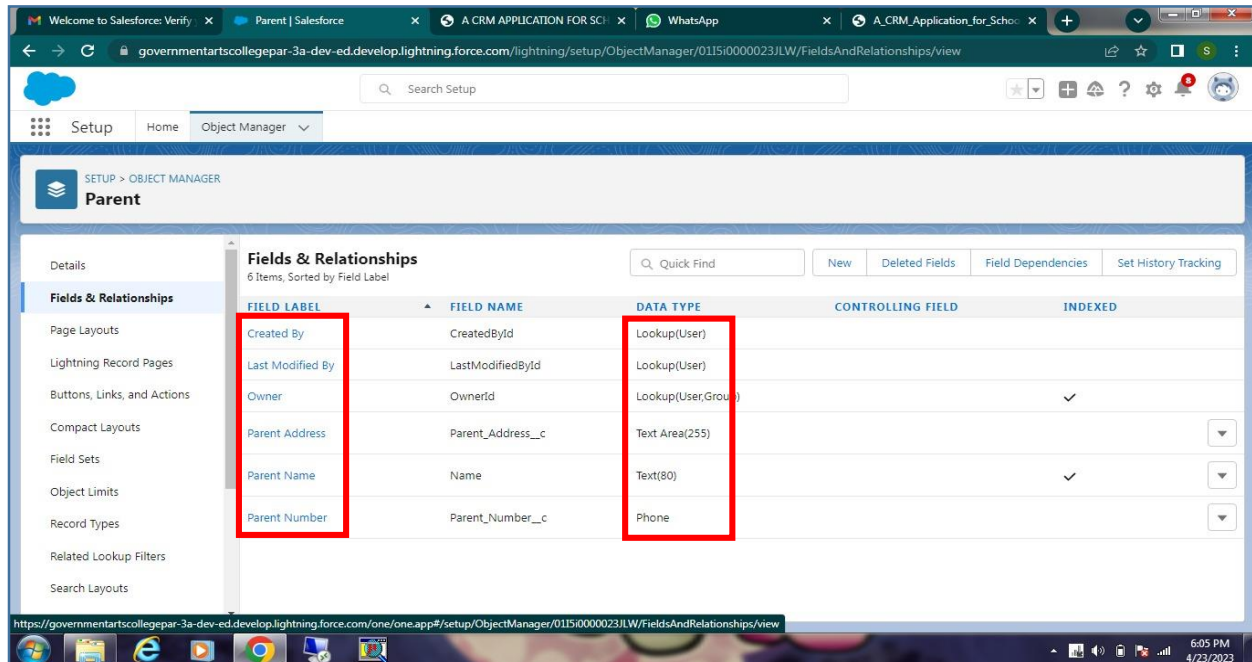
Field Name: Parent_Number

Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

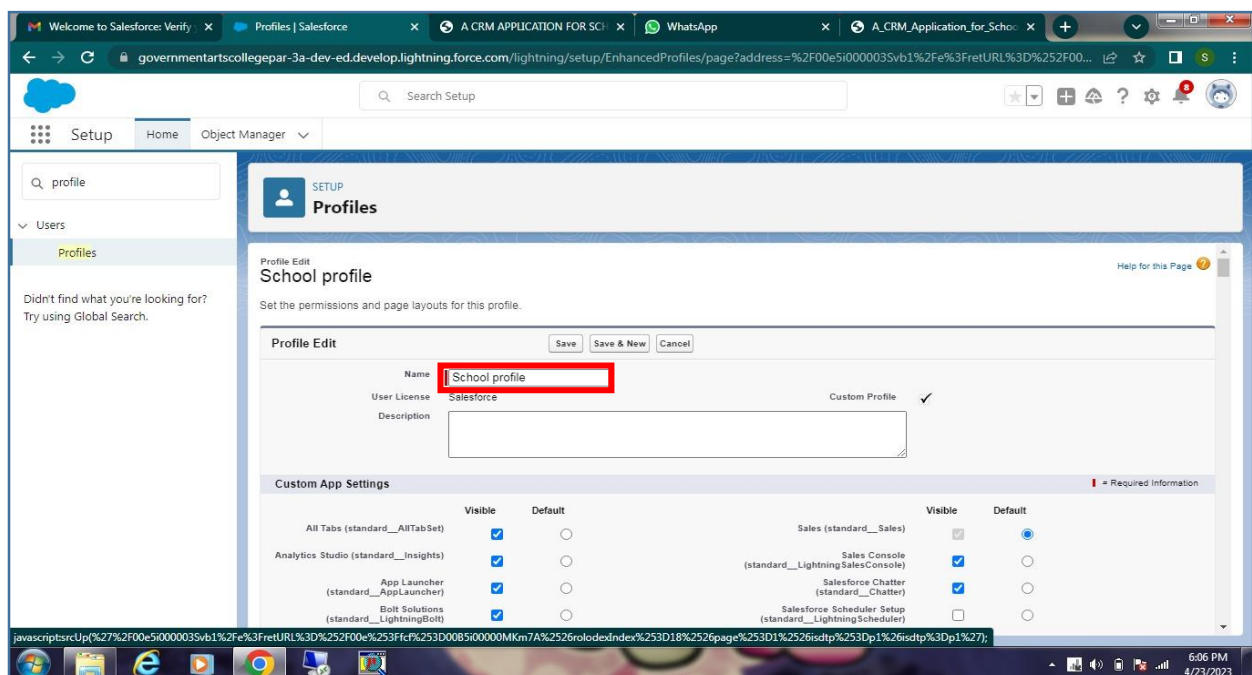
Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

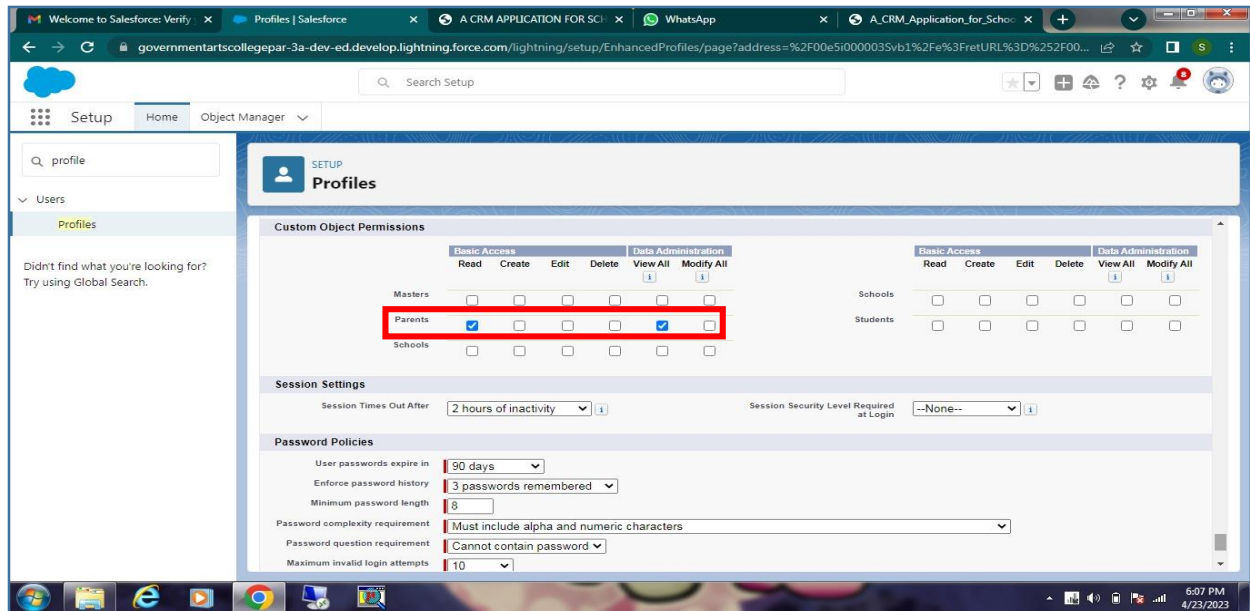
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Milestone-5: Profile

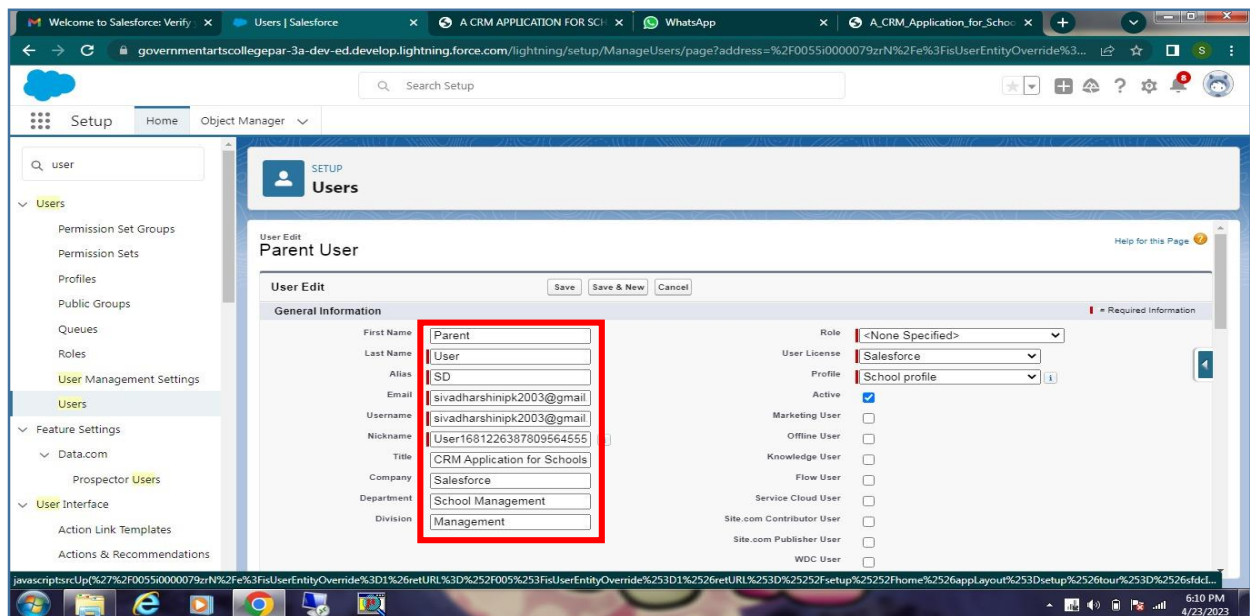
Creation on profile:

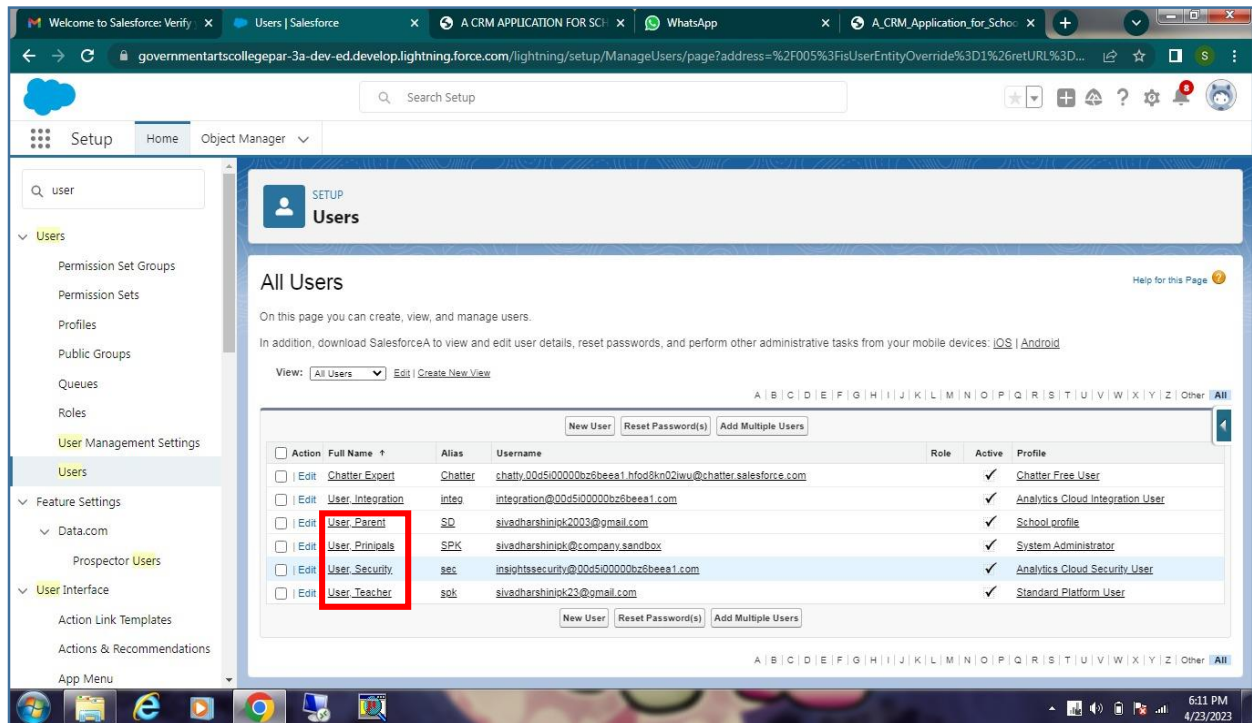




Milestone-6: Users

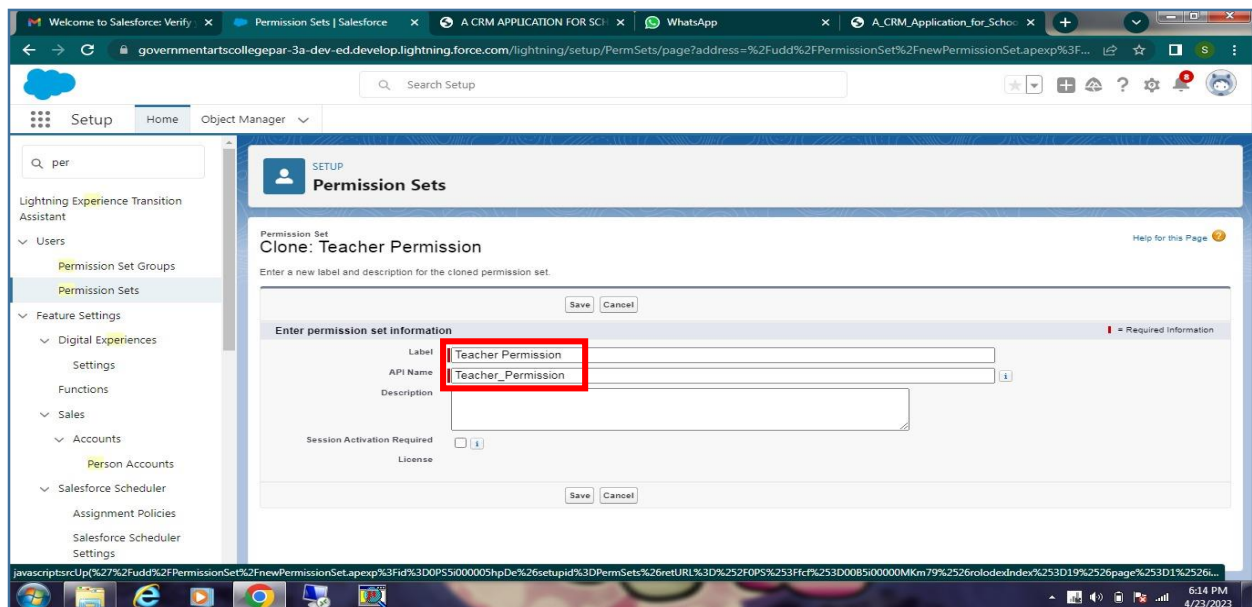
Creating a Users:



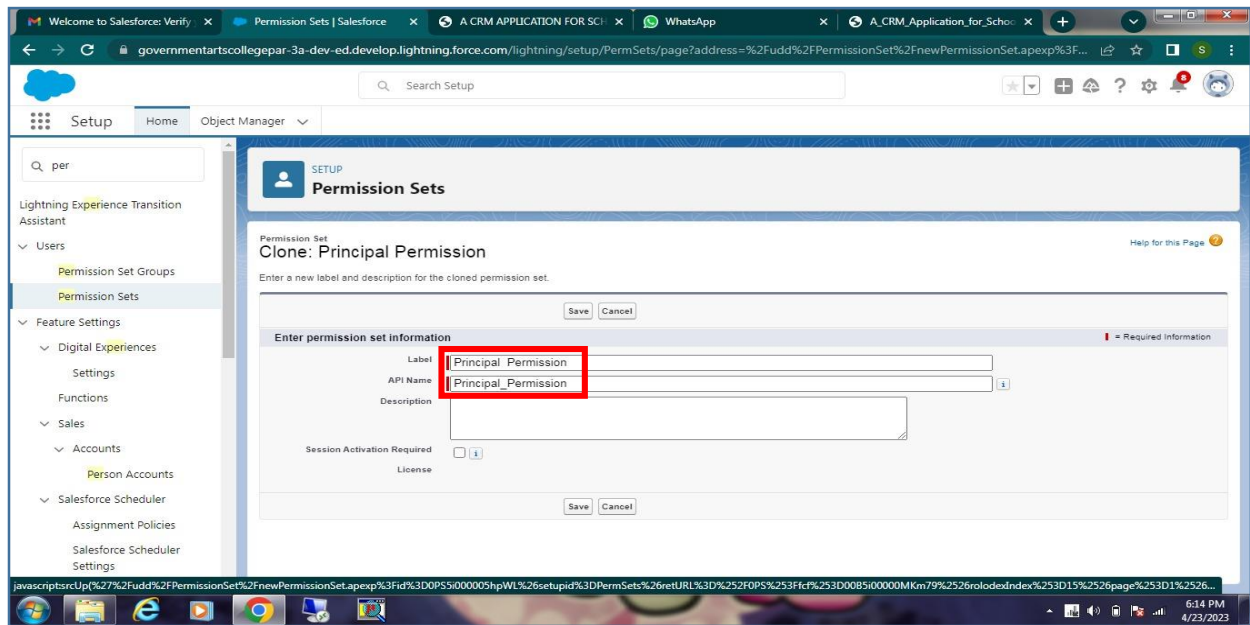


Milestone-7:Permission sets

Activity 1: Permission sets 1:

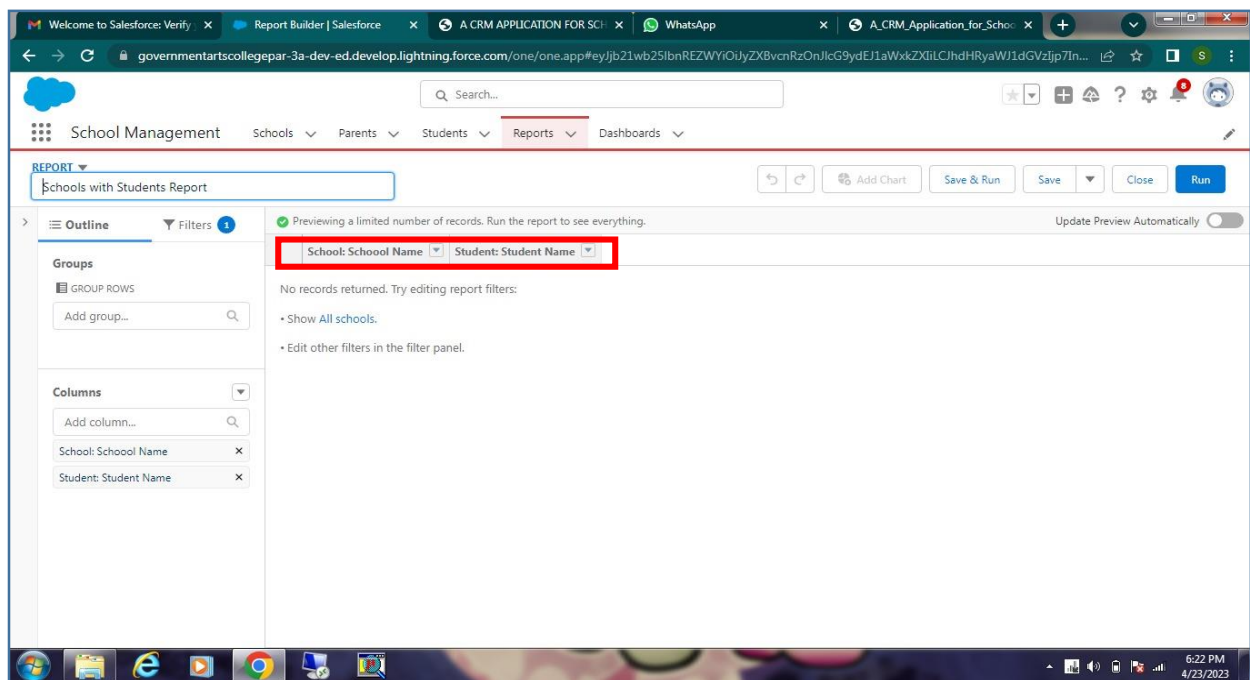


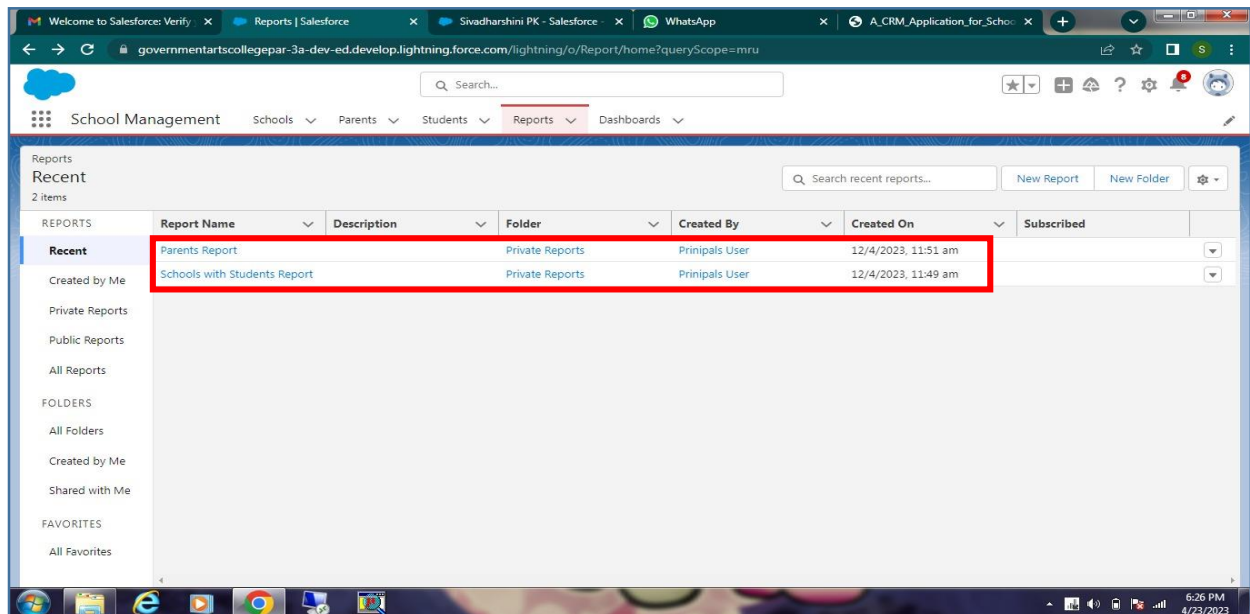
Activity 2: Permission sets 2:



Milestone-8:Reports

Reports :





4 Trailhead Profile Public URL

Team Lead- <https://trailblazer.me/id/sivpk>

5 ADVANTAGES & DISADVANTAGE

- Reduction in the cost of expenses.
- Improving the quality of service / product.
- Improving the organization management process.
- Increased customer loyalty.
- Track and increase the number of potential clients.
- History of work with each student.
- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.
- Poor communication.
- Lack of leadership.

6 Applications

- Tracking Customers.
- Collecting Data for Marketing.
- Improving Interactions and Communications.
- Streamlining Internal Sales Processes.

7 CONCLUSION

In recent years, there have been several changes in the ways of operating in Higher Education Institutes. There is a strong wave of digitization that has been creating an impact in the management styles, teaching methods, and educating the students. The institutes need automation in their processes; skill-based learning methods and better communication to maintain high standards of education.

8 FUTURE SCOPE

Customers now communicate through multiple channels, and businesses need to ensure that they have a consistent communication strategy across all these channels. Future CRM systems will allow businesses to interact with customers via email, phone, social media, and other channels.