

PROJECT REPORT TEMPLATE

A CRM Application for Schools and Colleges

1. Introduction

Overview

- (i) School Management is the process of creating and maintaining an school.
- (ii) This process spans from the very beginning of planning all the way to post – event strategizing.
- (iii) At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.
- (iv) During the event, event managers oversee the event live and make sure things run smoothly.
- (v) After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying and the ball for any post-event offerings.
- (vi) All different branches of planning go into event management, including various types of sourcing, designing, regulation, checks, and on-site management.
- (vii) In event management, you could be in the process of creating a conference, a product, launch, an internal sales kick-off, or even a wedding.
- (viii) Really, any event that requires considerable planning and execution is event management.

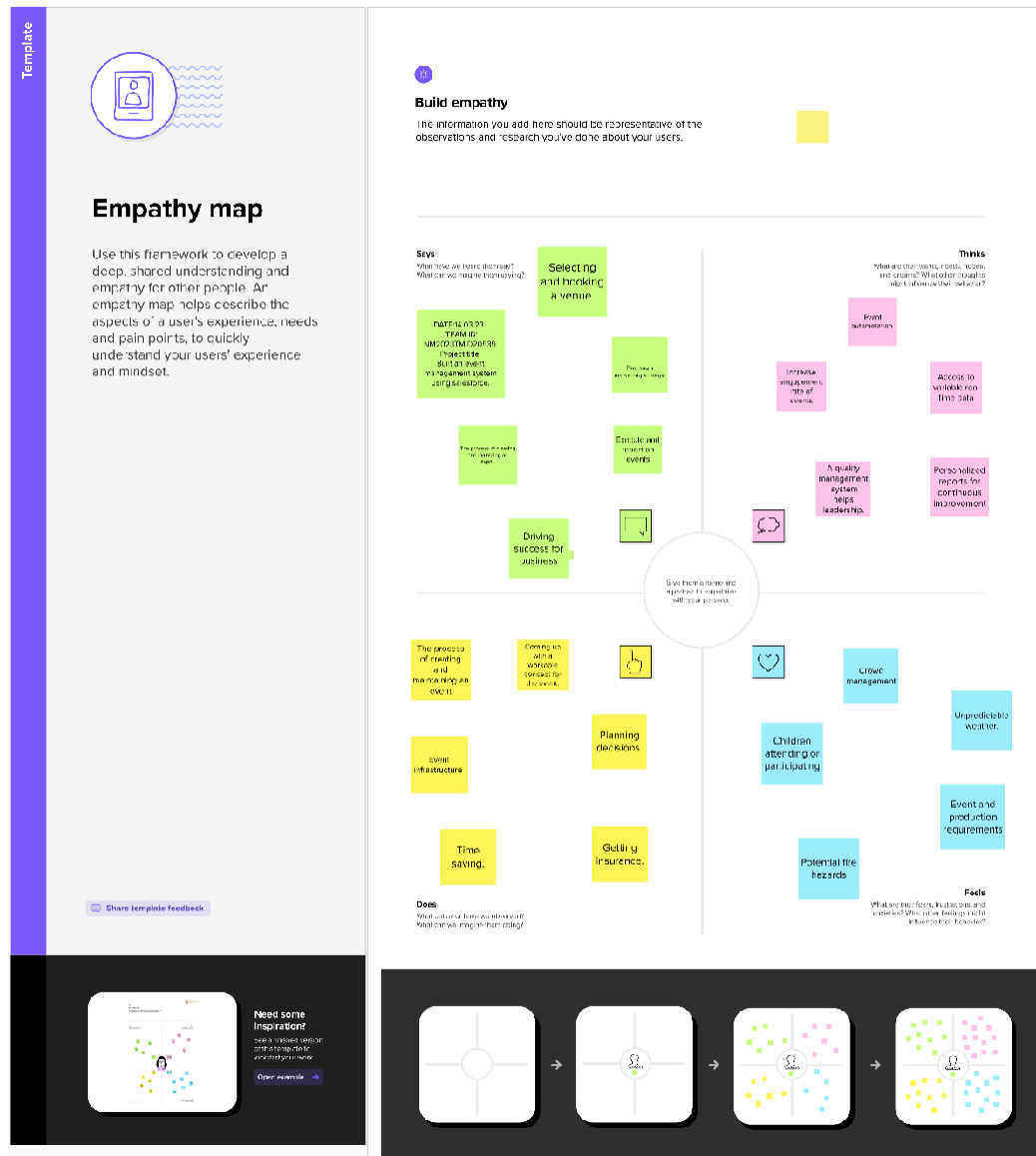
Purpose

- (i) Purpose to manage events throughout their lifecycle is the purpose of school management.
- (ii) This lifecycle of activities to detect events, make sense of them and determine the appropriate control action, which is coordinated by the event management process.
- (iii) Promotion of new products or services.
- (iv) Achieving the desired exposure and brand awareness.
- (v) Attracting more prospects and clients from exhibitions and trade shows.
- (vi) Improving brand positioning through professional events and conferences.
- (vii) Creative solutions to drive the highest level of satisfaction from the guests.
- (viii) Handling all permissions, permits, insurance and security concerns.
- (ix) Saving valuable time, efforts and money when hiring experience event managers.

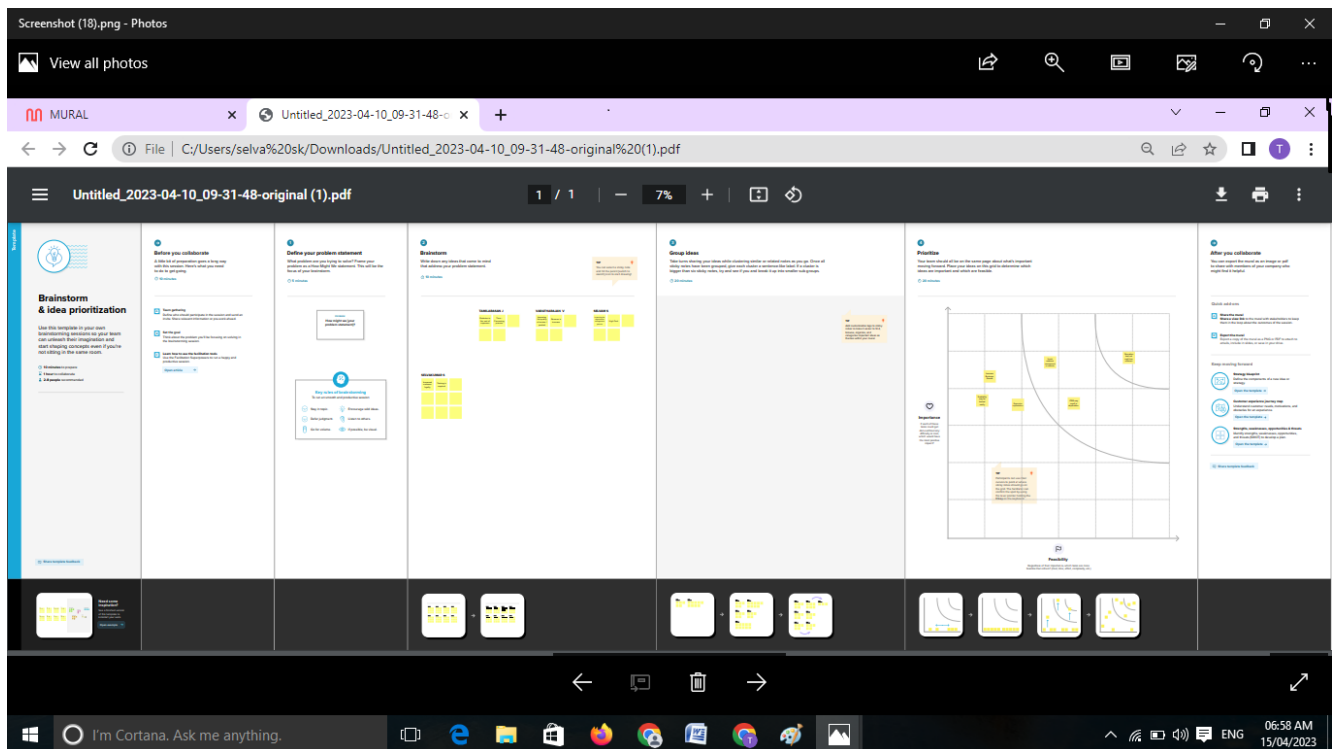
- (x) Reducing the possibility of any incidents that harm the professional atmosphere.

2. Problem Definition & Design Thinking

Empathy Map



Ideation and Brainstorming Map



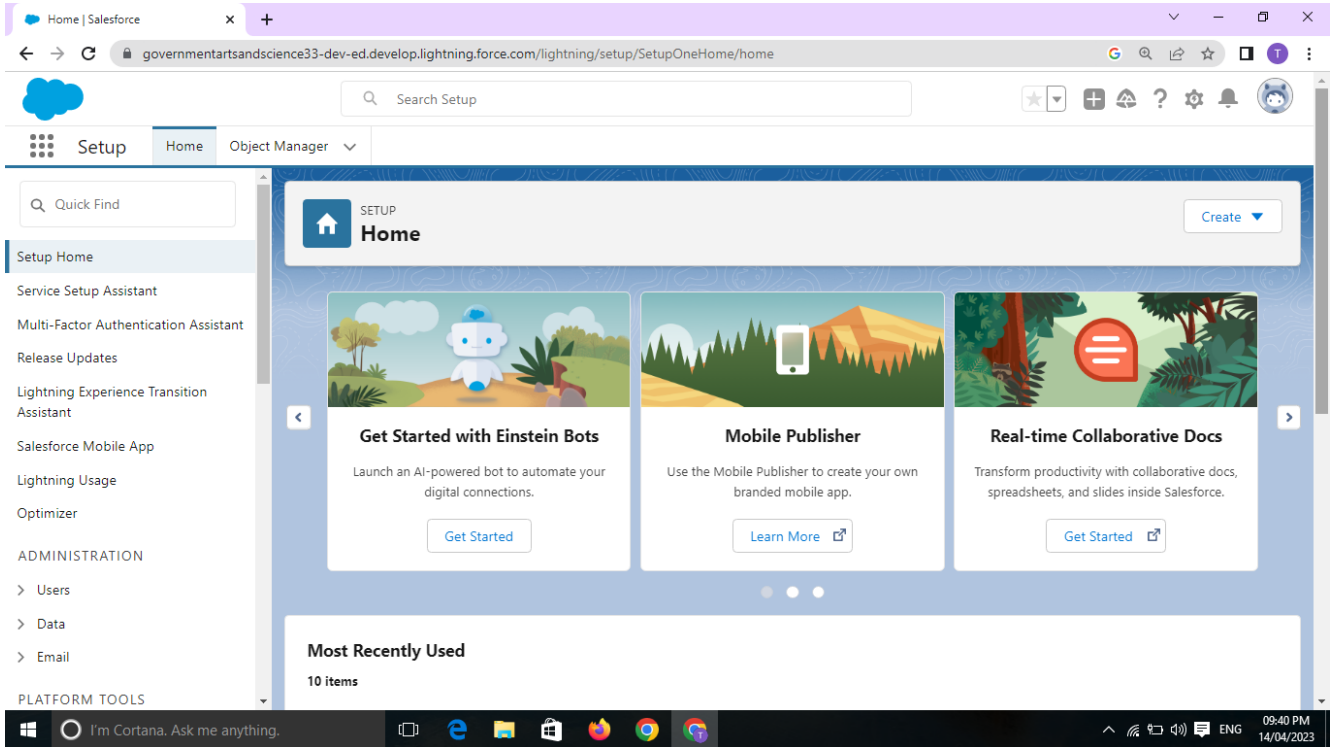
3.Result

Data Model

<u>Object Name</u>	<u>Fields in the object</u>	
<u>School</u>	Field label	Data type
	Address	Text Area
	Highest Marks	Roll - Up summary
	Number of students	Roll - Up summary
	Phone number	Phone
<u>Students</u>	Field label	Data type
	Class	Number
	Results	Picklist
	School	Master-Details
<u>Parents</u>	Field label	Data type
	Parent Address	Text Area
	Parent Number	Phone
	Parent Name	Text

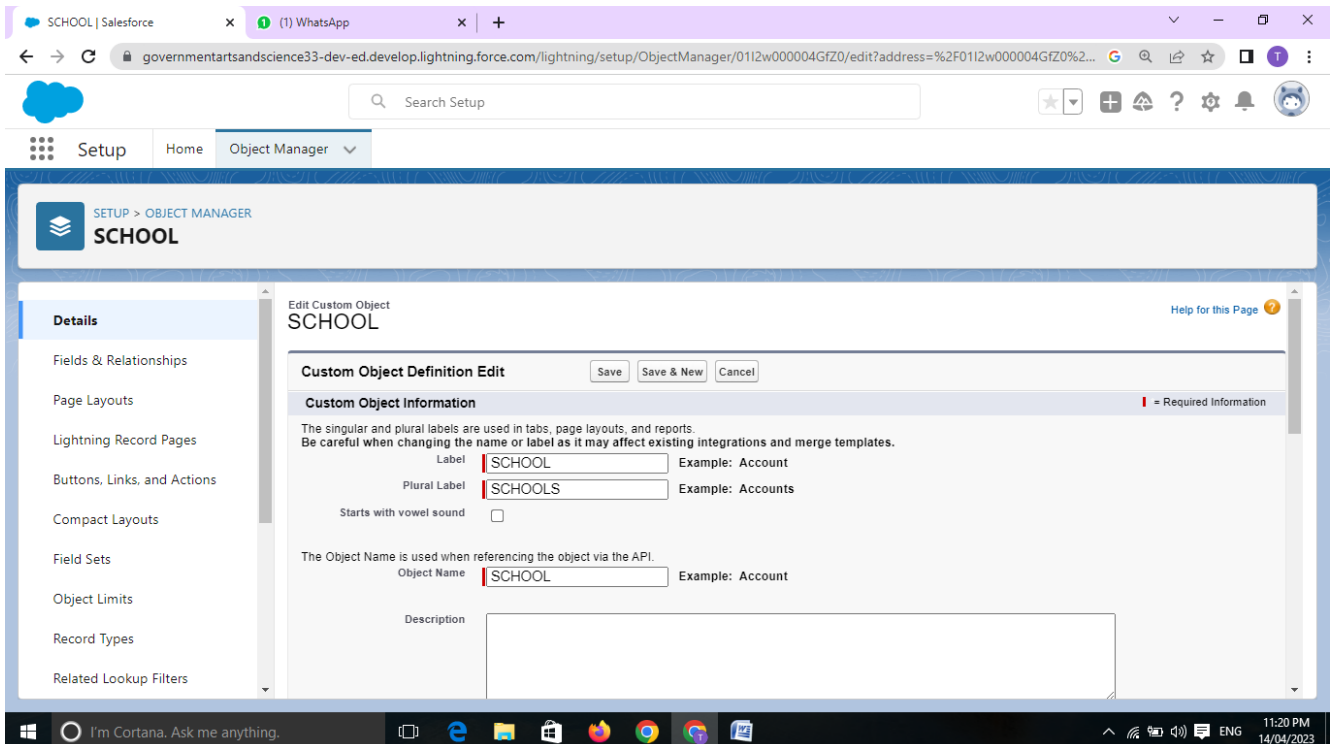
Activity and Screenshot

Milestone -1: Salesforce



Milestone-2: Object

Activity -1: Creation of School Object:



Activity – 2: Creation of Student Object:

student | Salesforce

governmentartsandsience33-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004GfrO/edit?address=%2F0112w000004GfrO%2F...

Search Setup

Setup Home Object Manager

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

Edit Custom Object
student

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing 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

I'm Cortana. Ask me anything.

11:26 PM 14/04/2023

Activity -3: Creation of Parent Object:

parent | Salesforce

governmentartsandsience33-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gfrx/edit?address=%2F0112w000004Gfrx%2F...

Search Setup

Setup Home Object Manager

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

Edit Custom Object
parent

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label parent Example: Account
Plural Label parents Example: Accounts
Starts with vowel sound ☐

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

I'm Cortana. Ask me anything.

11:28 PM 14/04/2023

Milestone-3: Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled "Lightning Experience App Manager" and features a "Clone Apps(Beta)" section with a toggle for "Enable App Cloning" (currently disabled). Below this is a table listing 23 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified, App..., and Vi....

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		21/03/2023, 10:38 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashb...	21/03/2023, 10:38 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	21/03/2023, 10:38 am	Classic	✓

Milestone -4 Fields and Relationships

Activity-1: Creation of fields for the School objects:

The screenshot shows the Salesforce Lightning Experience Object Manager interface for the "SCHOOL" object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled "Fields & Relationships" and features a "Quick Find" search bar and buttons for "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking". Below this is a table listing 8 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (COUNT student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT student)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number_del__c	Phone		

Activity -2: Creation of fields for the Student objects:

The screenshot shows the Salesforce Setup interface for the 'student' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. The table below lists the fields:

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)		
Results	Results__c	Picklist		
SCHOOL	SCHOOL__c	Master-Detail(SCHOOL)		✓
student Name	Name	Text(80)		✓

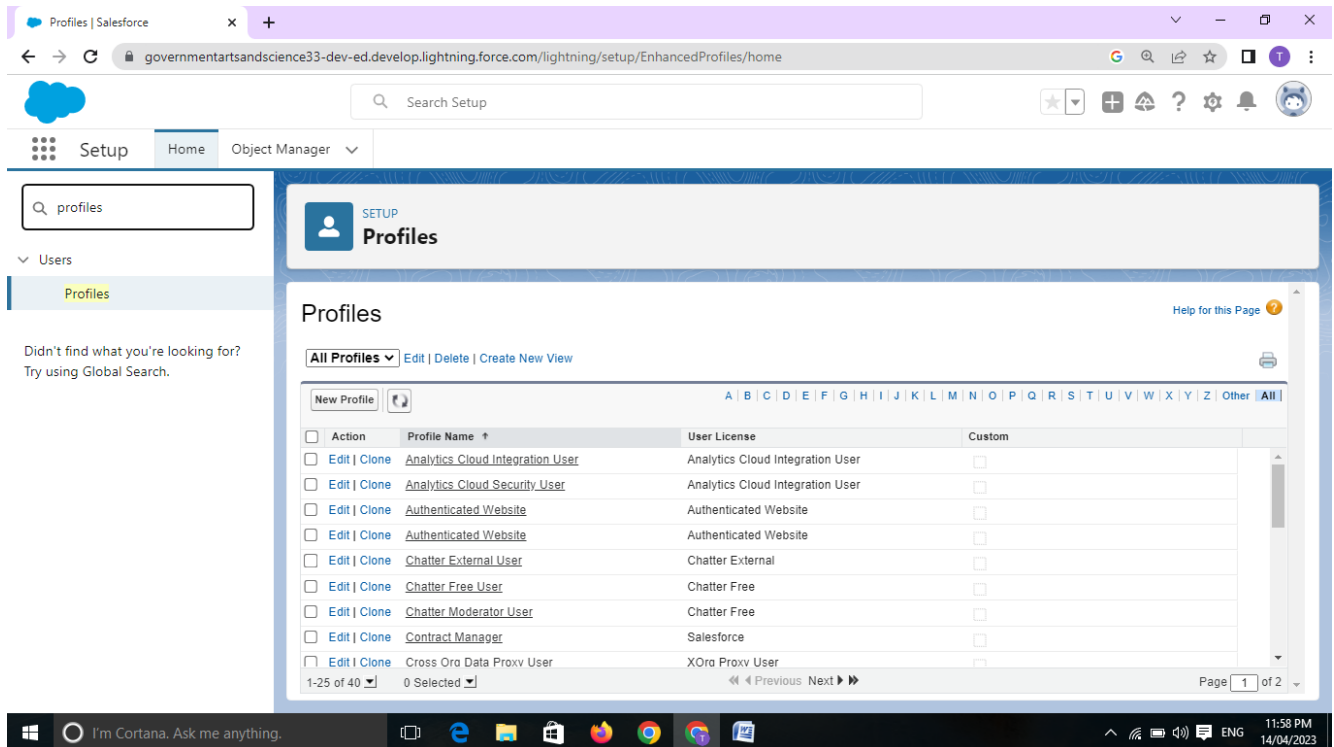
Activity -3: Creation of fields for the Parent objects:

The screenshot shows the Salesforce Setup interface for the 'parent' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. The table below lists the fields:

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 Address	Parent_Address__c	Text Area(255)		
parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Milestone -5: Profile

Activity : Creation on Profile :

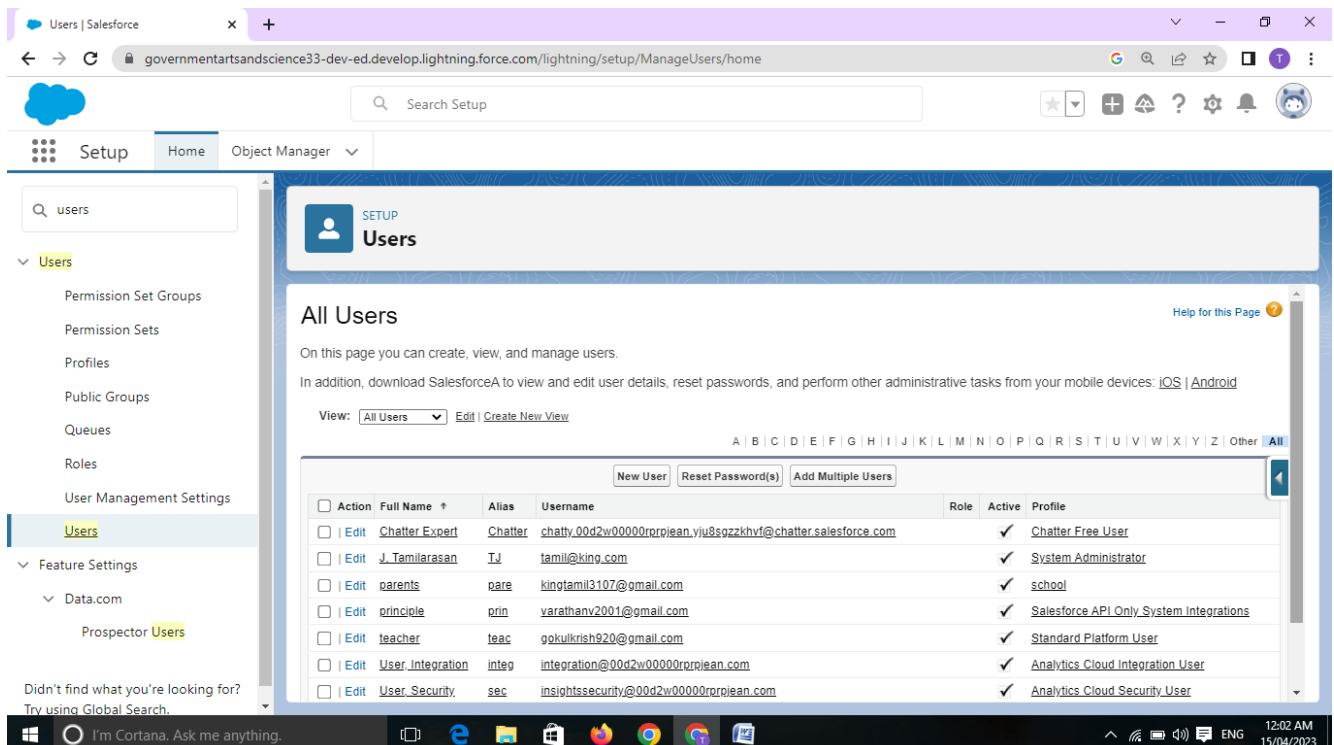


The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profiles' entered and a list of navigation items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'All Profiles' view is selected, showing a list of profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', and 'Cross Oro Data Proxy User'. The bottom of the screen shows the Windows taskbar with the time 11:58 PM and date 14/04/2023.

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

Milestone -6: Users

Activity : Creating a Users

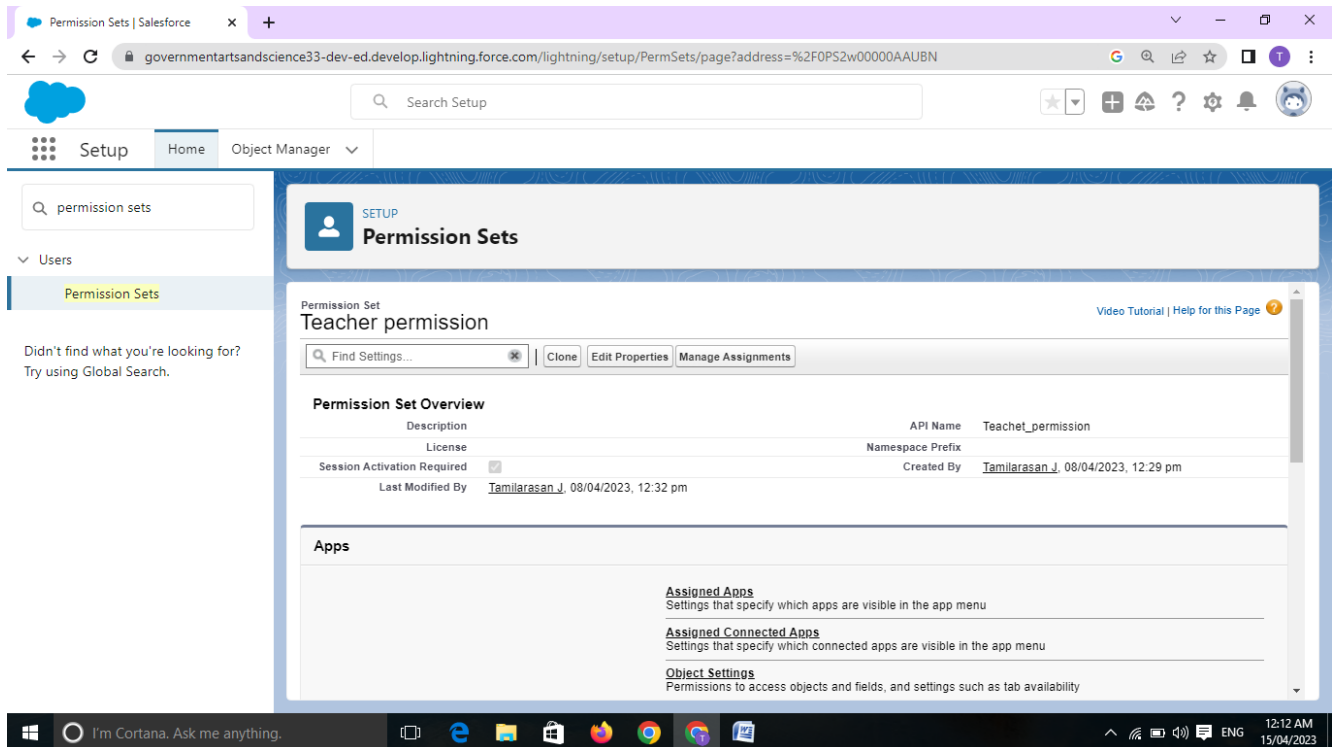


The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'users' entered and a list of navigation items including 'Users' and 'Feature Settings'. The main content area is titled 'All Users' and includes a 'New User' button and a table of existing users. The 'All Users' view is selected, showing a list of users such as 'Chatter Expert', 'J. Tamilarasan', 'parents', 'principle', 'teacher', 'User Integration', and 'User Security'. The bottom of the screen shows the Windows taskbar with the time 12:02 AM and date 15/04/2023.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d2w00000r0r0jean_vju8sgzzkhv1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	J. Tamilarasan	TJ	tamil@king.com		<input checked="" type="checkbox"/>	System Administrator
Edit	parents	pare	kingtamil3107@gmail.com		<input checked="" type="checkbox"/>	school
Edit	principle	prin	varathanv2001@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
Edit	teacher	teac	gokulkrish920@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	User Integration	integ	integration@00d2w00000r0r0jean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightsssecurity@00d2w00000r0r0jean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone -7: Permission sets

Activity -1: Permission sets 1:

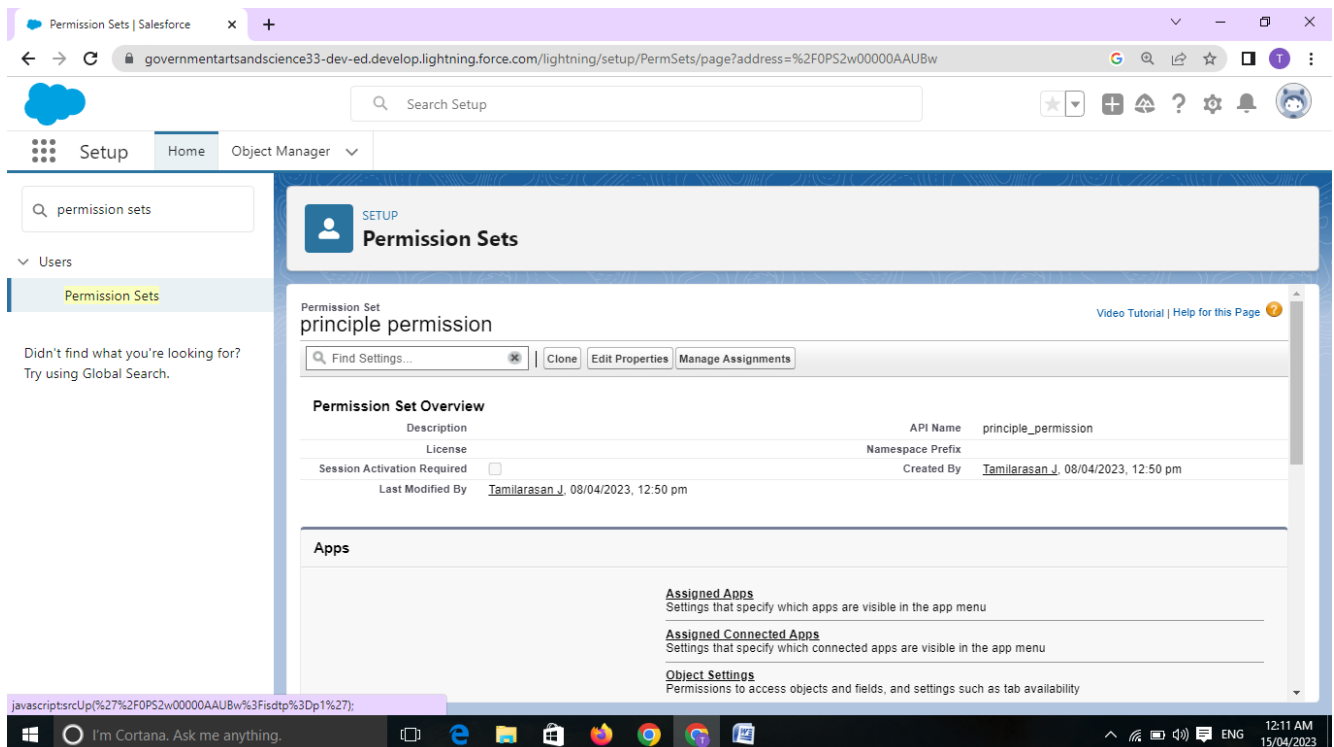


The screenshot shows the Salesforce Setup interface for a permission set named "Teacher permission". The left sidebar contains a search bar with "permission sets" and a list of users, with "Permission Sets" highlighted. The main content area displays the "Permission Set Overview" for "Teacher permission". The overview table includes the following information:

Field	Value
Description	
License	
Session Activation Required	<input checked="" type="checkbox"/>
Last Modified By	Tamilarasan J. 08/04/2023, 12:32 pm
API Name	Teachet_permission
Namespace Prefix	
Created By	Tamilarasan J. 08/04/2023, 12:29 pm

Below the overview table, there are three sections: "Apps", "Assigned Apps", "Assigned Connected Apps", and "Object Settings". The "Assigned Apps" section is currently expanded, showing the text: "Settings that specify which apps are visible in the app menu".

Activity -2: Permission sets 2 :



The screenshot shows the Salesforce Setup interface for a permission set named "principle permission". The left sidebar contains a search bar with "permission sets" and a list of users, with "Permission Sets" highlighted. The main content area displays the "Permission Set Overview" for "principle permission". The overview table includes the following information:

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	Tamilarasan J. 08/04/2023, 12:50 pm
API Name	principle_permission
Namespace Prefix	
Created By	Tamilarasan J. 08/04/2023, 12:50 pm

Below the overview table, there are three sections: "Apps", "Assigned Apps", "Assigned Connected Apps", and "Object Settings". The "Assigned Apps" section is currently expanded, showing the text: "Settings that specify which apps are visible in the app menu".

Milestone -8: Reports

Activity -1: School Report :

The screenshot shows the Salesforce Report Builder interface. The report is titled 'New SCHOOLS Report' and is in the 'SCHOOLS' category. The left sidebar shows the 'Outline' with 'Groups' (GROUP ROWS) and 'Columns' (SCHOOL: SCHOOL Name). The main area displays a table with 4 rows and 1 column, showing school names. The table is titled 'SCHOOL: SCHOOL Name'.

	SCHOOL: SCHOOL Name
1	government boys higher secondary school
2	government boys higher secondary school
3	government boys highersecondary school
4	Government boys higher secondary school

Activity -2: Students Report :

The screenshot shows the Salesforce Report Builder interface. The report is titled 'New SCHOOLS with students Report' and is in the 'SCHOOLS with students' category. The left sidebar shows the 'Outline' with 'Groups' (GROUP ROWS) and 'Columns' (SCHOOL: SCHOOL Name, student: student Name). The main area displays a table with 4 rows and 2 columns, showing school names and student names. The table is titled 'SCHOOL: SCHOOL Name' and 'student: student Name'.

	SCHOOL: SCHOOL Name	student: student Name
1	Government boys higher secondary school	varatharajan V
2	Government boys higher secondary school	Tamilarasan J
3	Government boys higher secondary school	Selvam S
4	Government boys higher secondary school	Selvakumar S

Activity -3: Parents Report :

The screenshot shows the Salesforce Report Builder interface. The browser address bar displays the URL: `governmentartsandscience33-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000EP0TrEAL/edit?queryScope=userFolders`. The page title is "Report Builder | Salesforce". The breadcrumb navigation shows "Application of scho..." > "SCHOOLS" > "parents" > "students" > "Report Builder". The report is titled "New parents Report" and is in the "parents" object. The left sidebar shows the "Outline" tab with "Groups" (GROUP ROWS) and "Columns" (parent: parent Name). The main area shows a preview of the report with a table of 4 records. The table has a header "parent: parent Name" and the following data rows:

	parent: parent Name
1	senthil kumar
2	Velmani T
3	sekar
4	JEYSANKAR P

The bottom of the screen shows the Windows taskbar with the time 12:32 AM and date 15/04/2023.

4. Trailhead Profile Public URL :

Team Leader : Tamilarasan.J

<https://trailblazer.me/id/tarassn>

Team Member : Selvakumar.S

<https://trailblazer.me/id/selvask>

Team Member : Selvam.S

<https://trailblazer.me/id/gsarvesh1>

Team Member : Varatharajan.V

<https://trailblazer.me/id/vvaratharajan1>

5. Advantages and Disadvantages

List of Advantages

- ✓ There are many advantages to using a school management system. Perhaps the most obvious benefit is that it can help to save time.
- ✓ A school management system can also help to improve efficiency. For example, if you need to track attendance, you can do this easily using a school management system
- ✓ The best part of SMS software is that you can quickly access the data you want in seconds. All data is at the fingertip of the administration.
- ✓ The student data can be arranged beautifully using such school management platforms.
- ✓ You can assign a unique id to each student, print their id cards, and monitor their grades & performance in exams.

List of Disadvantages

- ✓ CRM costs. one of the greatest challenges to CRM implementation is cost.
- ✓ Business culture. A lack of commitments or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.
- ✓ Poor communication.
- ✓ Lack of leadership.
- ✓ Good interest connectivity is another major issue that needs to be addressed.
- ✓ It is not actually a disadvantages of student management but instead is necessary for its optimal functioning.
- ✓ An easy to use interface not only increases the acceptance level of the software but also save time and money spent on training the stakeholders to use system.

6. APPLICATION

- ✓ Streamlined admissions and enrollment process.
- ✓ Efficient student management.
- ✓ Effective faculty management.
- ✓ Powerful reporting and analysis.
- ✓ Customizable and scalable solution.
- ✓ Seamless alumni management.

7. Conclusion

- ✓ Customer relationship management (CRM) can play a remarkable role in optimizing relation based operations in organizations. Successful implementation of CRM involves satisfying customers' needs which consequently results in building, managing and retaining effective and long-term relationships with the customers.
- ✓ In area of higher education, CRM can be utilized in order to build and manage relationships between educational institutions and their students who play the role as customers. As a part of higher educational area, Swedish universities can take advantage of CRM capabilities as well in building, managing and retaining long-term relationships with their students.

8. Future Scope

