

A CRM APPLICATION FOR SCHOOLS AND COLLEGES

1. INTRODUCTION

1.1 OVERVIEW

Customer relationship management or CRM software enables educational institutions such as schools, colleges, and universities to manage relationships with students, parents, staff, alumni, and other stakeholders. It handles all aspects of the entire student lifecycle, from enrollment and academic progress tracking to fundraising management and reporting tools.

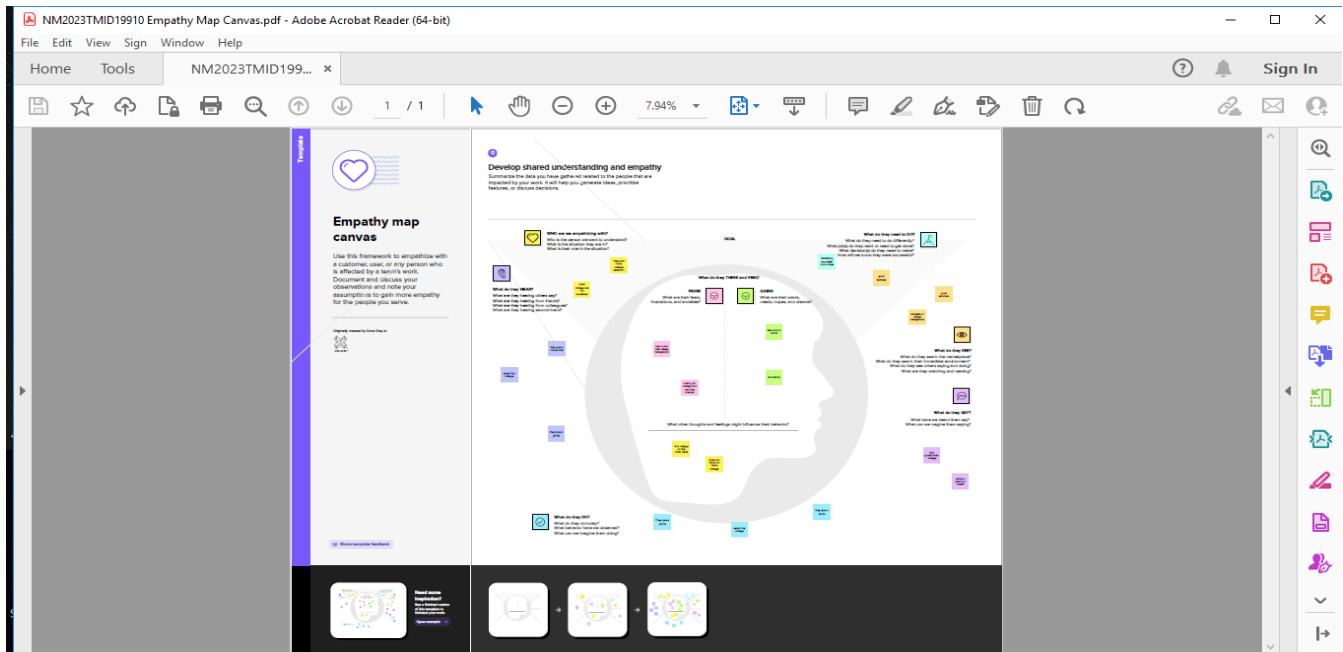
1.2 PURPOSE

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. By keeping this information in a centralized system, business teams have access to the insights they need, the moment they need them.

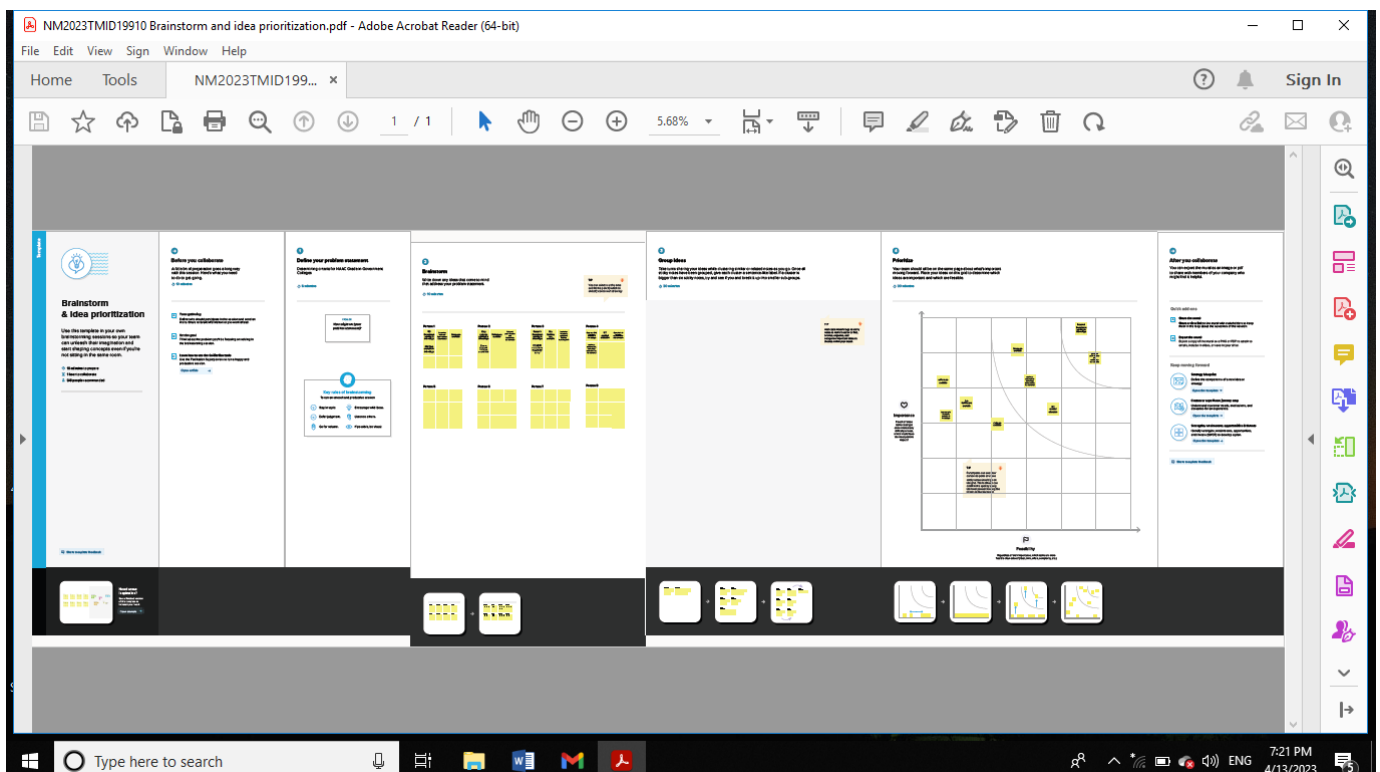
Some CRMs will integrate with other vital educational tools, such as learning management systems (LMS) and accounting software. In either case, the aim is to improve communication, efficiency, and ultimately, student outcomes by equipping students, parents and teachers with the necessary information.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 IDEATION & BRAINSTORMING MAP



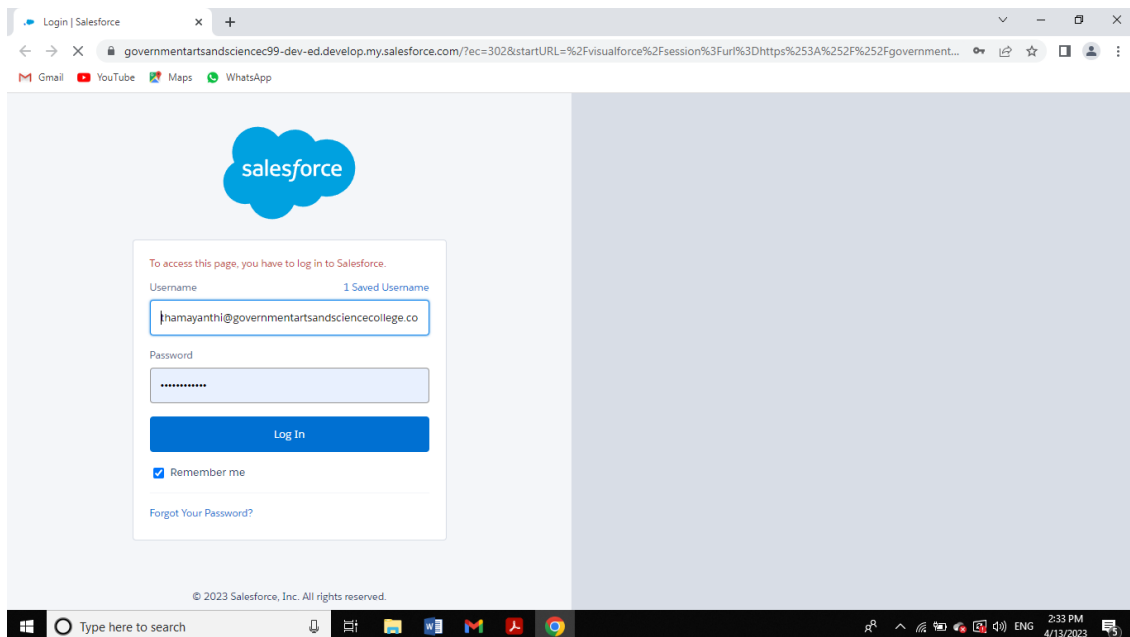
3. RESULT

3.1 DATA MODEL

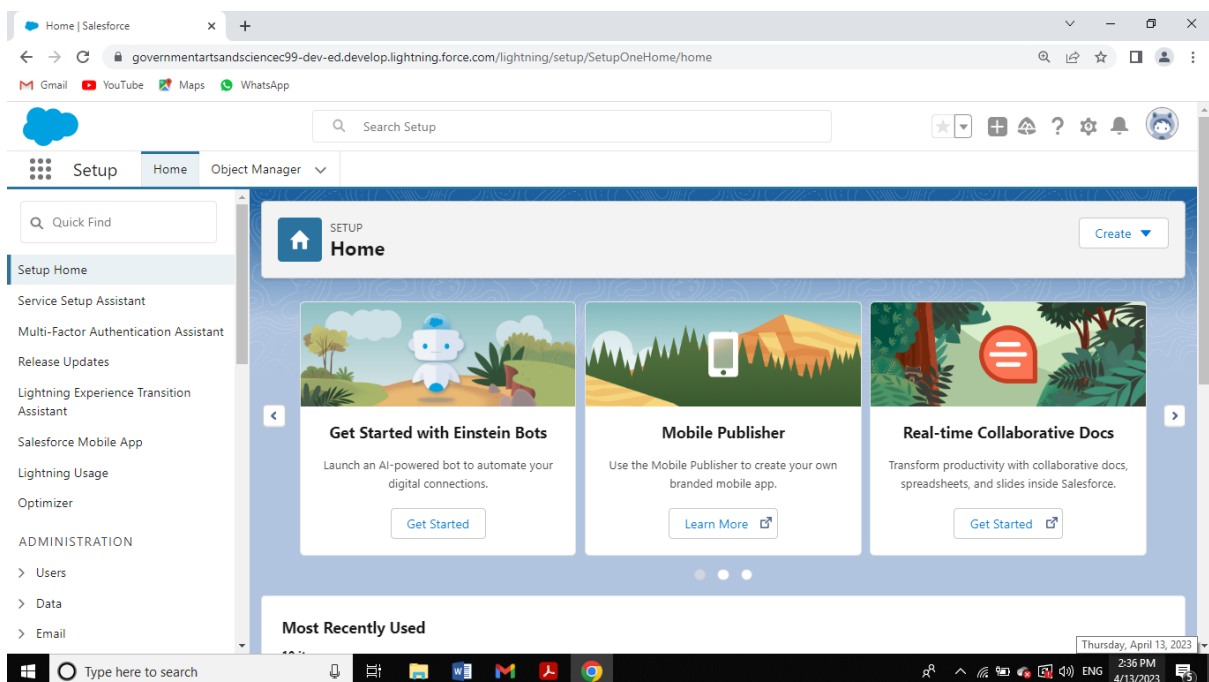
Object Name	Fields in the Object					
College	<table><tr><td>Field label</td><td>Data type</td></tr><tr><td>College</td><td>Text area</td></tr></table>		Field label	Data type	College	Text area
Field label	Data type					
College	Text area					
Student	<table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Student</td><td>Master-Detail Relationship</td></tr></table>		Field label	Data type	Student	Master-Detail Relationship
Field label	Data type					
Student	Master-Detail Relationship					
Parent	<table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Parent</td><td>Text area</td></tr></table>		Field label	Data type	Parent	Text area
Field label	Data type					
Parent	Text area					

3.2. Activity & Screenshot

Milestone 1 : Creation Salesforce Account

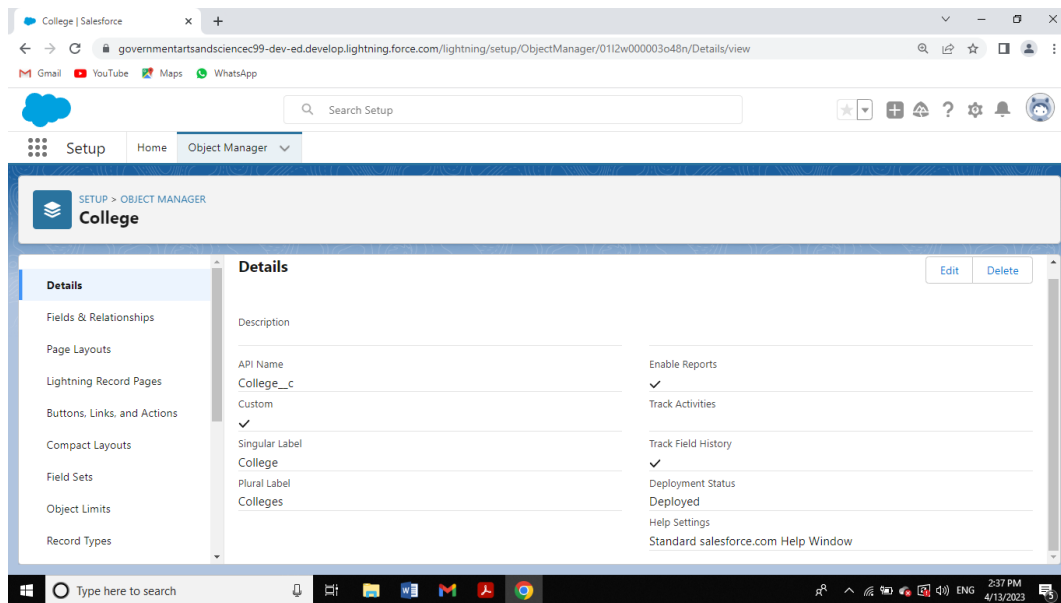


Salesforce Login

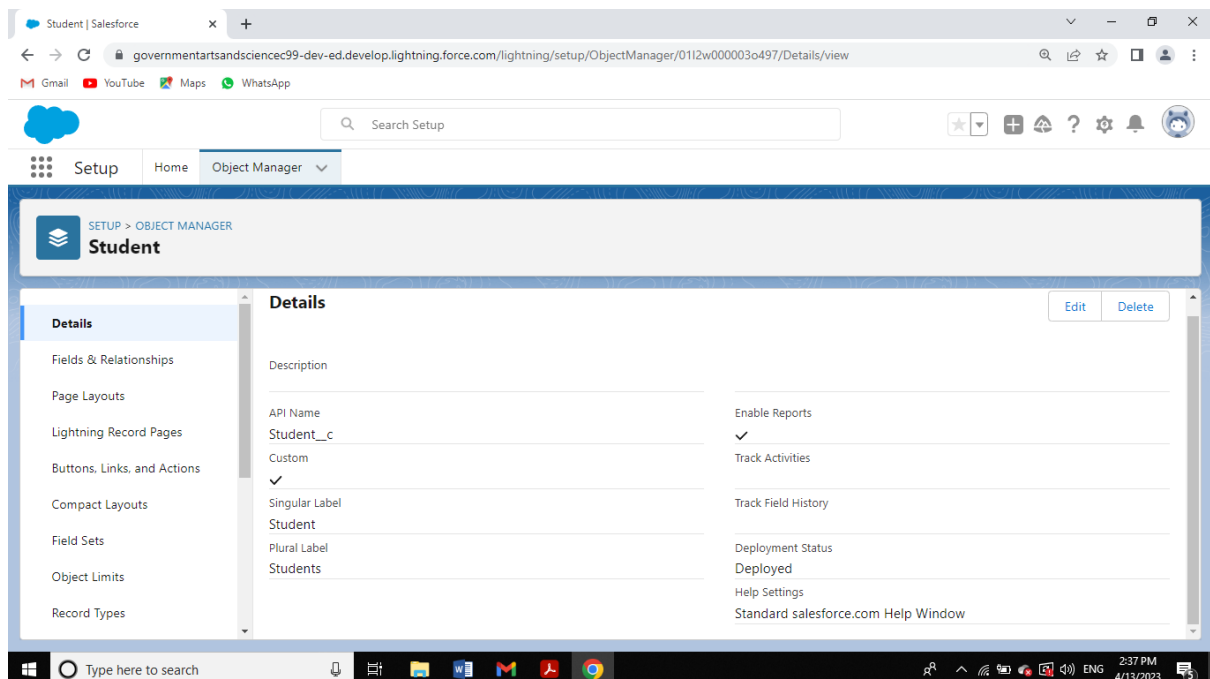


Milestone 2: Object

Activity 1: College Object



Activity 2: Student Object



Activity 3: Parent Object

The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Details' and includes a search bar and 'Edit' and 'Delete' buttons. The details are organized into two columns. The left column contains: Description, API Name (Parent__c), Custom (checked), Singular Label (Parent), Plural Label (Parents), and Record Types. The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

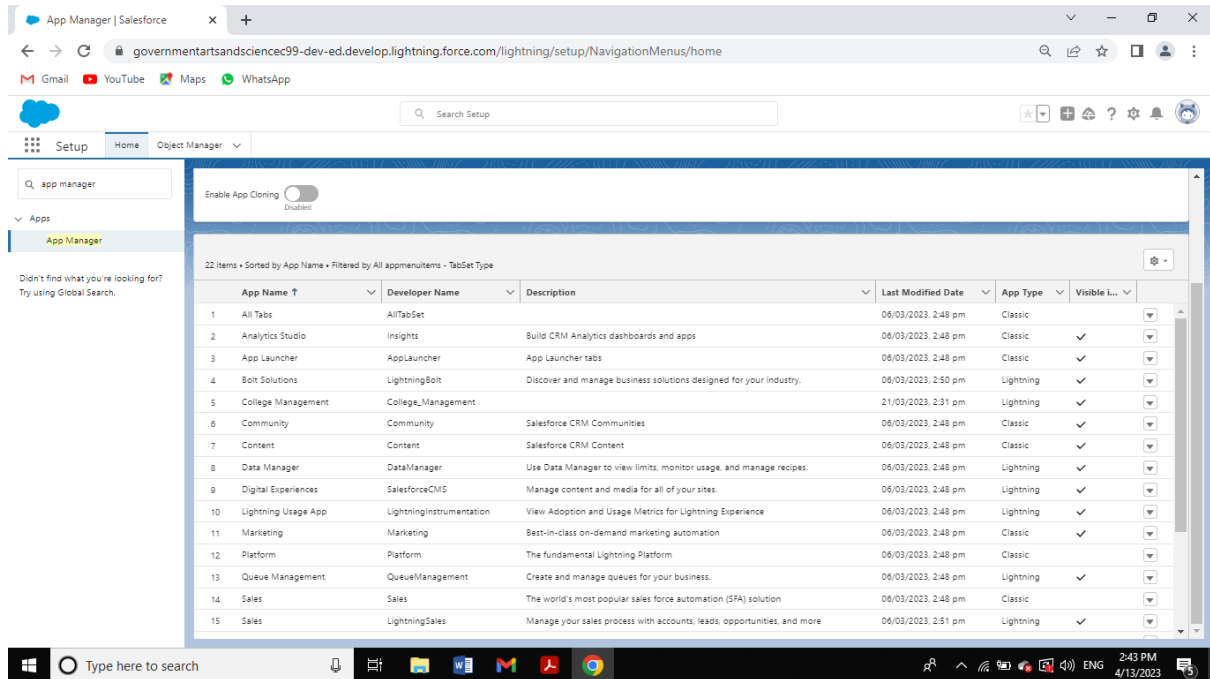
TABS

The screenshot shows the Salesforce Custom Tabs page. The left sidebar contains a navigation menu with the following items: User Interface (selected), Rename Tabs and Labels, and Tabs. The main content area is titled 'Custom Tabs' and includes a search bar and a 'Help for this Page' button. The content is organized into four sections: Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs. The Custom Object Tabs section contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	Collapses	Books	
Edit Del	Parents	Form	
Edit Del	Students	Computer	

The Web Tabs, Visualforce Tabs, and Lightning Component Tabs sections each contain a 'No [Tab Type] have been defined' message and a 'New | What is This?' button.

Milestone 3. Lightning App

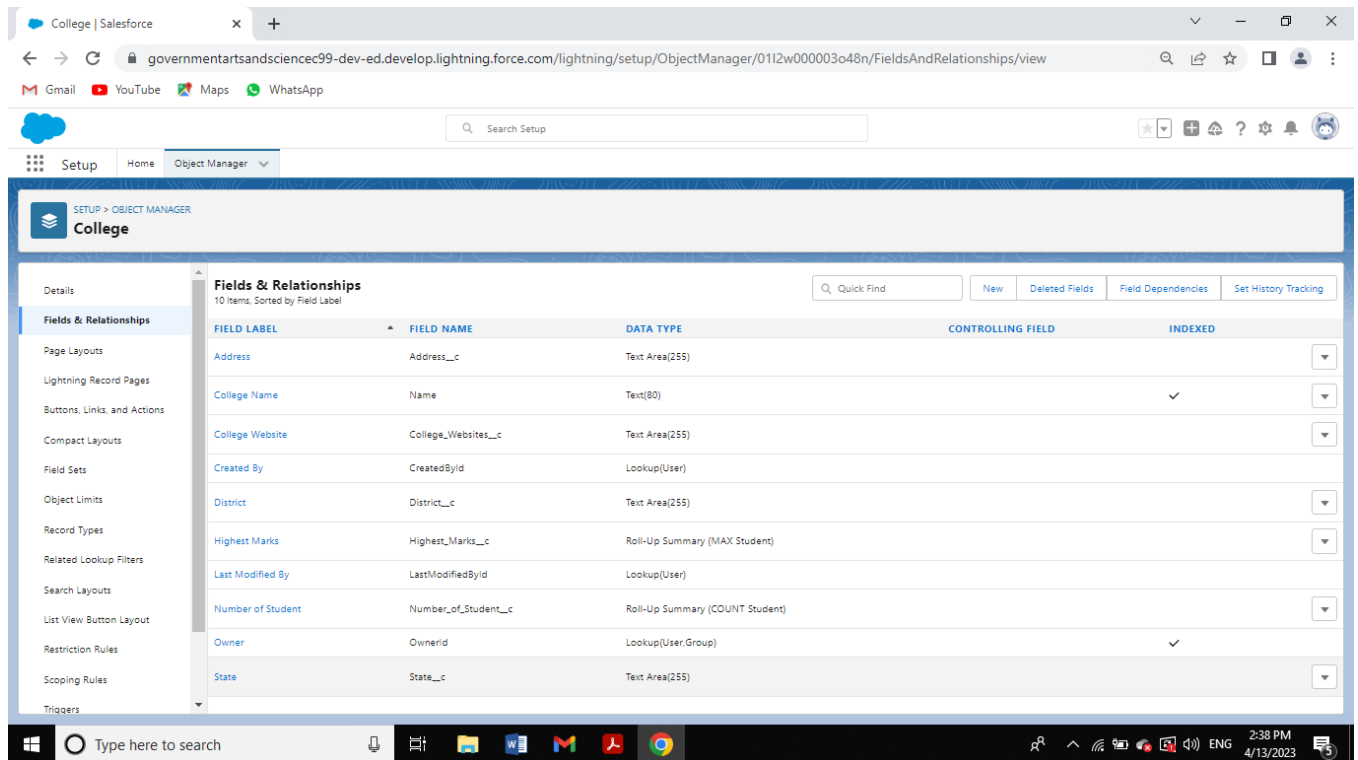


The screenshot shows the Salesforce App Manager interface. The top navigation bar includes the Salesforce logo, a search bar, and a user profile icon. The left sidebar contains the 'Setup' menu and a search bar. The main content area displays a list of 22 apps, sorted by App Name. The list includes columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visible L... (likely Visible to All). The apps listed are:

App Name	Developer Name	Description	Last Modified Date	App Type	Visible L...
1 All Tabs	AllTabSet		06/03/2023, 2:48 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	06/03/2023, 2:48 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	06/03/2023, 2:48 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	06/03/2023, 2:50 pm	Lightning	✓
5 College Management	College_Management		21/03/2023, 2:31 pm	Lightning	✓
6 Community	Community	Salesforce CRM Communities	06/03/2023, 2:48 pm	Classic	✓
7 Content	Content	Salesforce CRM Content	06/03/2023, 2:48 pm	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	06/03/2023, 2:48 pm	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	06/03/2023, 2:48 pm	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	06/03/2023, 2:48 pm	Lightning	✓
11 Marketing	Marketing	Best-in-class on-demand marketing automation	06/03/2023, 2:48 pm	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	06/03/2023, 2:48 pm	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	06/03/2023, 2:48 pm	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) solution	06/03/2023, 2:48 pm	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	06/03/2023, 2:51 pm	Lightning	✓

Milestone 4: Fields and Relationships

Activity 1: Fields for the College Objects:



The screenshot shows the Salesforce Object Manager interface for the 'College' 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, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The main content area displays the 'Fields & Relationships' section, showing 10 items sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
College Name	Name	Text(80)		✓
College Website	College_Websites__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Student	Number_of_Student__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Text Area(255)		

Activity 2: Fields for the Student Objects:

The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Class, College, Created By, Last Modified By, Marks, Phone number, Results, and Student Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
College	College__c	Master-Detail(College)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone number	Phone_number__c	Phone		
Results	Results__c	Picklist		
Student Name	Name	Text(80)		✓

Activity 3: Fields for the Parent Objects:

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a table of 9 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Age, College, Created By, Email, Last Modified By, Owner, Parent Address, Parent Name, and Parent Number.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age__c	Number(18, 0)		
College	College__c	Lookup(College)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
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

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'prof' and a list of navigation items: Users, Profiles, and a search result for 'prof'. 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 'Custom' column contains checkboxes for various features. The bottom of the screen shows a Windows taskbar with the search bar and several application icons.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	College	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

Milestone 6: Users

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'Active Users' and includes a 'New User' button and a table of active users. The table has columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The 'Active' column contains checkboxes for each user. The bottom of the screen shows a Windows taskbar with the search bar and several application icons.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter0002w00000r030eas@salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Parrot	parrot	tamizhvin2628@gmail.com		<input checked="" type="checkbox"/>	College
<input type="checkbox"/> Edit Login	Principals	prin	rnav00078@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	S. Thamyavanthi	TS	thamyavanthi@governmentartsandsciencecollege.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Teachers	teas	samanathan0707@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	User Integration	integ	integration@0002w00000r030eas.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@0002w00000r030eas.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 7: Permission Sets

The screenshot shows the Salesforce 'Permission Sets' setup page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of existing permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The 'License' column lists various roles like 'B2B Buyer Permission Set One Seat', 'CRM User', 'Commerce Admin', etc. The bottom of the page shows a Windows taskbar with the date 4/13/2023 and time 2:45 PM.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, make purch...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and orders rel...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect as a tele...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon ...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Ama...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager		Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, queued parties...	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seats
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Service	Lightning Order Management User

Milestone 8: Reports

The screenshot shows the Salesforce 'Reports' page. The left sidebar contains navigation links for 'Recent', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The main content area is titled 'Reports' and includes a search bar, a 'New Report' button, and a table of recent reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The 'Report Name' column lists reports like 'New Parents Report' and 'New Colleges with Students Report'. The bottom of the page shows a Windows taskbar with the date 4/13/2023 and time 2:48 PM.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Parents Report		Private Reports	Thamayanthi S	6/4/2023, 1:12 pm	
New Colleges with Students Report		Private Reports	Thamayanthi S	6/4/2023, 1:03 pm	

4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/thams11>

Team Member 1 - <https://trailblazer.me/id/semanathan1507>

Team Member 2 - <https://trailblazer.me/id/ravi09678>

Team Member 3 - <https://trailblazer.me/id/sarau38>

Project Report Template

5. ADVANTAGES

It allows for the consolidation of customer data and the basis for deep insights.

It speeds up the sales conversion process.

It increases staff productivity, lowering time-cost.

It allows geographically dispersed teams to collaborate effectively.

Improves customer experience by allowing personalisation and improved query resolution.

DISADVANTAGES

Customer experience may worsen due to staff over-reliance on the system.

Security and data protection issues with centralised data.

The excess initial time and productivity cost at the implementation.

Requires a process-driven sales organisation.

CRM may not suit all businesses.

6. APPLICATION

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

7.CONCLUSION

Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BWM has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification.

8.FUTURE SCOPE

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.