

## CRM-APPLICATION-FOR-SCHOOL/COLLEGES

### 1 INTRODUCTION

#### 1.1 Overview

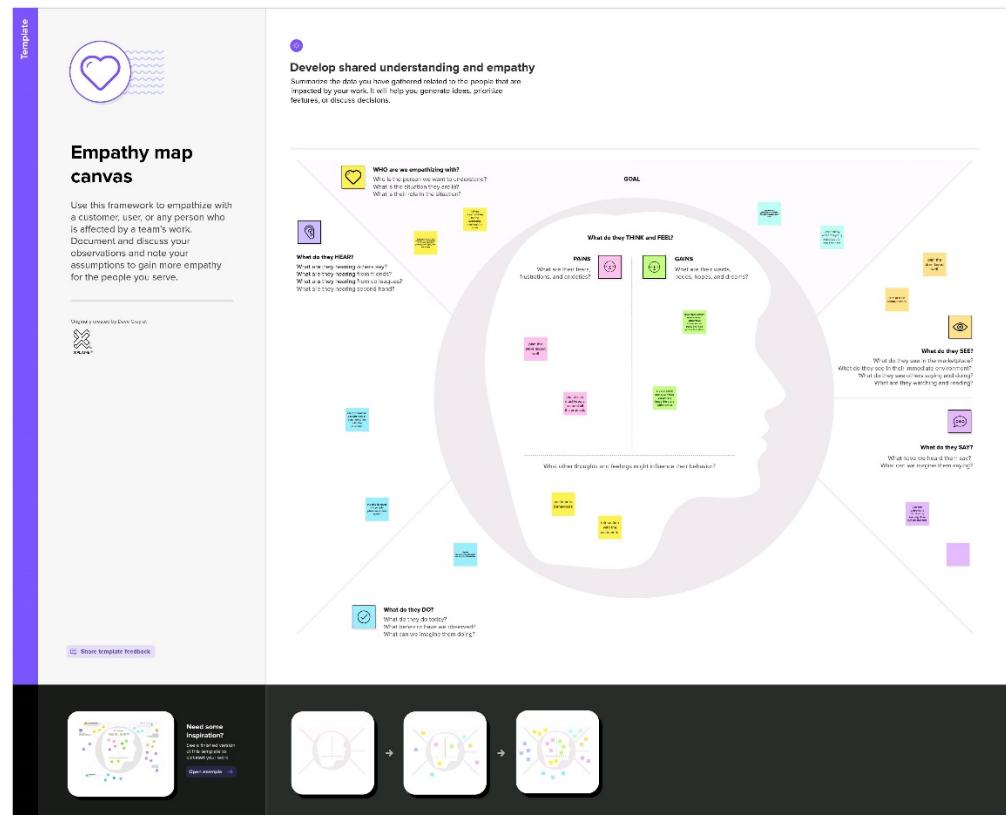
Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

#### 1.2 Purpose

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.

### 2 Problem Definition & Design Thinking

#### 2.1 Emaphthy Map Canvas



## 2. BRAIN STORM

	Field label	Data type
<b>Student</b>	Phone Number	Phone
	School	Master-Detail Relationship
	Result	Picklist
	Class	Number
<b>Parent</b>	Parent Address	Text Area
	Parent Number	Phone

### 3.2 Activity & Screenshot

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is <https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The page title is "Object Manager | Salesfo". The search bar at the top contains "School". The main content area displays a table titled "Object Manager" with one item listed:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	School_c	Custom Object		23/03/2023	✓

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is <https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The page title is "Object Manager | Salesfo". The search bar at the top contains "Student". The main content area displays a table titled "Object Manager" with one item listed:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Students	Students_c	Custom Object		23/03/2023	✓



A screenshot of a web browser displaying the Salesforce Object Manager. The URL is https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home. The page shows a table with one item: Parent, which is a Custom Object created on 23/03/2023. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed.

A screenshot of the Salesforce App Launcher. The search bar at the top contains the text "School Management". Below the search bar, there is a section titled "All Apps" which lists the "School Management" app. There is also a "Visit AppExchange" button.



School | Salesforce

https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w0000000000000

Cloud Setup Home Object Manager

SETUP > OBJECT MANAGER School

Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Address	Address__c	Text Area(255)		
Lightning Record Pages	Created By	CreatedBy	Lookup(User)		
Buttons, Links, and Actions	District	District__c	Text Area(255)		
Compact Layouts	Last Modified By	LastModifiedBy	Lookup(User)		
Field Sets	Owner	OwnerId	Lookup(User,Group)		✓
Object Limits	Phone Number	Phone_Number__c	Phone		
Record Types	School Name	Name	Text(80)		✓
Related Lookup Filters	Schoolwebsites	Schoolwebsites__c	Text Area(255)		
Search Layouts	I let View Button I about				
Search Layouts	State	State__c	Text Area(255)		
I let View Button I about					

Students | Salesforce

https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0112w0000

Setup Home Object Manager

SETUP > OBJECT MANAGER Students

Details Fields & Relationships

Fields & Relationships 8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
Students Name	Name	Text(80)		✓

List View Button Layout

Parent | Salesforce

https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0112w0000

Setup Home Object Manager

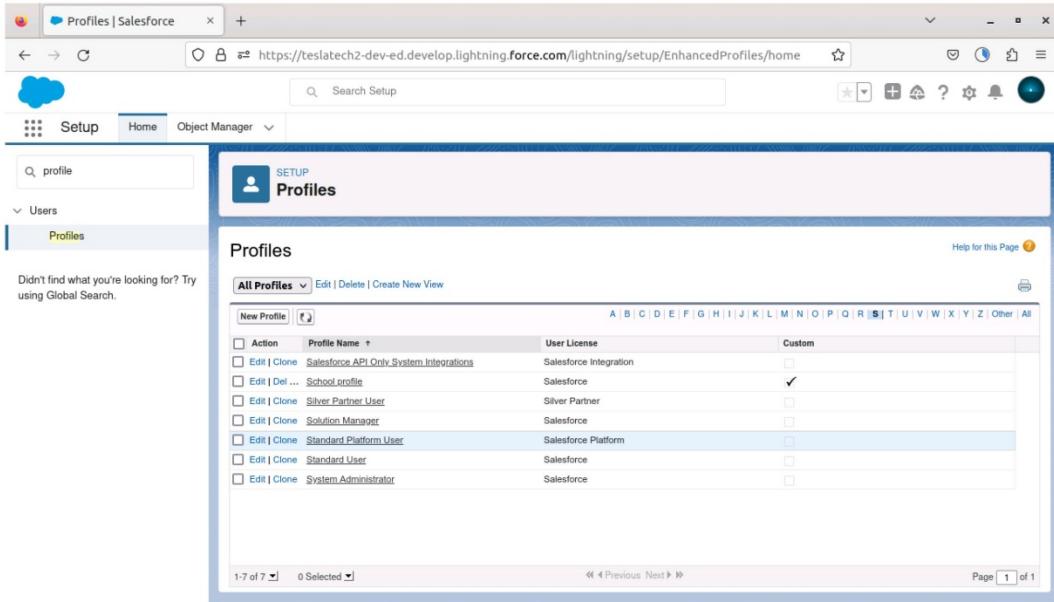
SETUP > OBJECT MANAGER Parent

Details Fields & Relationships

Fields & Relationships 6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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		

List View Button Layout



The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Profiles | Salesforce
- URL:** https://teslatech2-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home
- Section:** Profiles
- Search Bar:** profile
- Left Navigation:** Users > Profiles
- Message:** Didn't find what you're looking for? Try using Global Search.
- Table Headers:** Action, Profile Name, User License, Custom
- Table Data:** A list of profiles including:
  - Salesforce API Only System Integrations (User License: Salesforce Integration)
  - School profile (User License: Salesforce)
  - Silver Partner User (User License: Silver Partner)
  - Solution Manager (User License: Salesforce)
  - Standard Platform User (User License: Salesforce Platform)
  - Standard User (User License: Salesforce)
  - System Administrator (User License: Salesforce)
- Page Navigation:** 1-7 of 7, 0 Selected, Previous, Next, Page 1 of 1

Salesforce Setup - Users

https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

Users

All Users

Help for this Page

View: All Users | Edit | Create New View

New User | Reset Password(s) | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00d2w00000rk1veead_580a0cckcvark@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	P. SACHINDRA	SP	sachindra@teslatech.sandbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	S. Parent	ps	parent@acme.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	School profile
<input type="checkbox"/>	S. Principal	ps	principal@ps.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	S. Teacher	ts	teachers@ps.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User Integration	Integ	integration@00d2w00000rk1veead.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	insightssecurity@00d2w00000rk1veead.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

Salesforce Setup - Permission Sets

https://teslatech2-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

Permission Sets

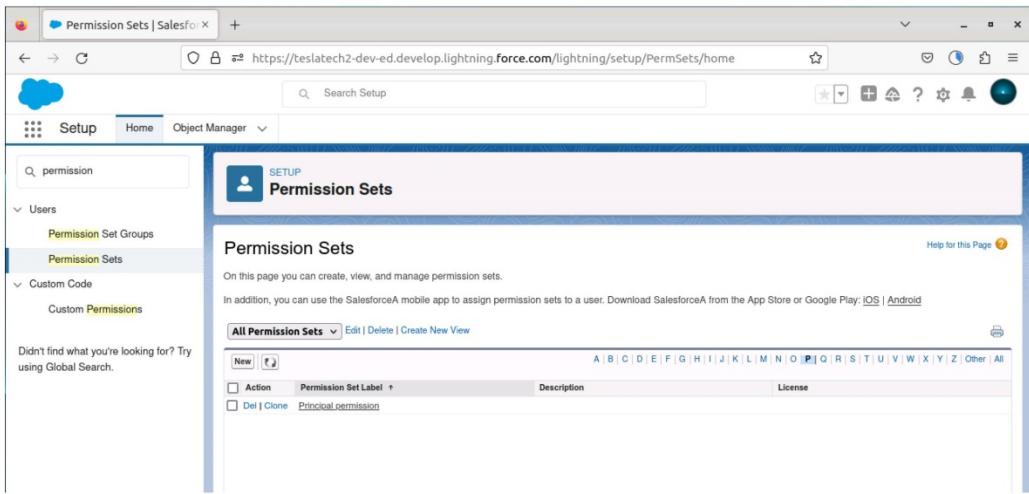
Help for this Page

All Permission Sets | Edit | Delete | Create New View

New |

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Teacher permission		

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



The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes a back arrow, forward arrow, search bar, and a URL bar displaying <https://teslatech2-dev-ed.lightning.force.com/lightning/setup/PermSets/home>. Below the navigation is a header with a cloud icon, "Setup", "Home", and "Object Manager". A search bar labeled "Search Setup" is present.

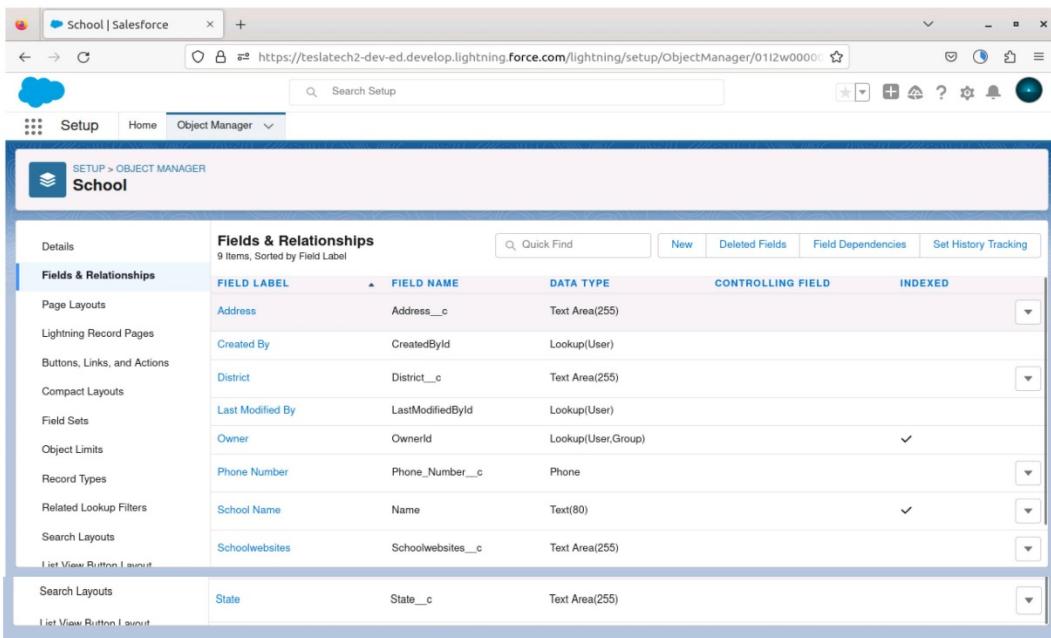
The main content area is titled "Permission Sets" and contains the following information:

- Permission Sets**: Subtitle indicating you can create, view, and manage permission sets.
- A note about mobile app availability: "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](#)".
- A toolbar with buttons for "All Permission Sets" (dropdown), "Edit", "Delete", and "Create New View".
- A navigation bar with links for "New" (highlighted in blue), "Edit", "Delete", and "Clone".
- A table header with columns: "Action", "Permission Set Label", "Description", and "License".
- A note below the table: "Did you find what you're looking for? Try using Global Search."



A screenshot of a web browser displaying the Salesforce Object Manager. The URL is https://teslatech2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home. The page shows a table with one item: Parent. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed. The 'Label' column shows 'Parent', 'API Name' shows 'Parent\_\_c', 'Type' shows 'Custom Object', 'Description' is blank, 'Last Modified' shows '23/03/2023', and 'Deployed' shows a checkmark. There is a search bar at the top right with the placeholder 'Parent'.

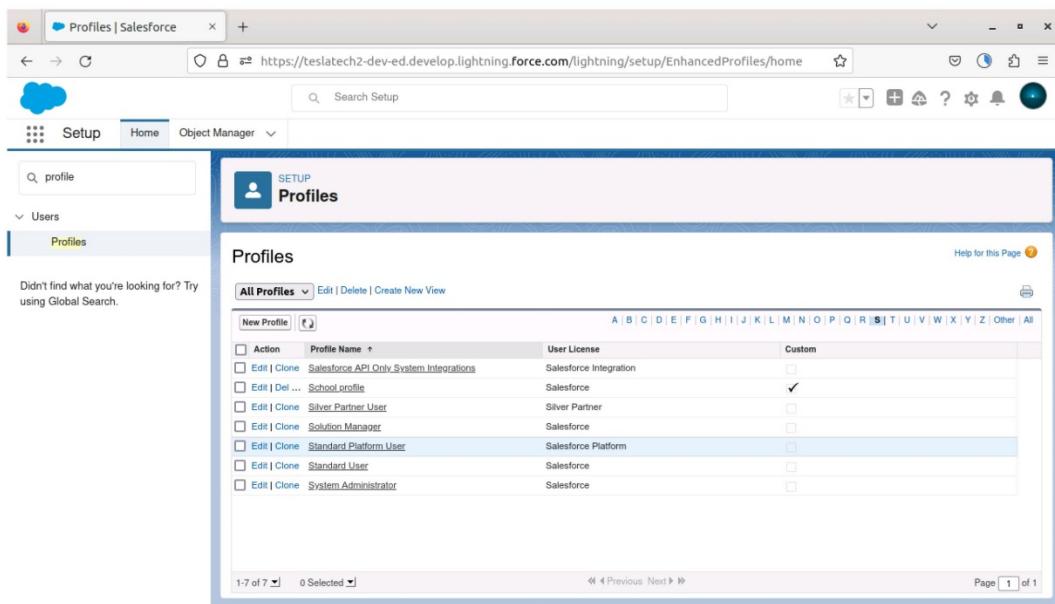
A screenshot of the Salesforce App Launcher. At the top, there is a search bar with the text 'School Management'. Below it, under the heading 'All Apps', there is a card for 'School Management'. The card has a purple icon, the text 'School Management' in yellow, and three vertical dots on the right. At the bottom, there is a heading 'All Items'.



The screenshot shows the Salesforce Object Manager interface for the 'School' object. The left sidebar lists various setup categories: 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, and List View Button Layouts.

The main content area is titled 'Fields & Relationships' and displays a table with 9 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)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
Schoolwebsites	Schoolwebsites__c	Text Area(255)		
I let View Button Layouts	State	Text Area(255)		



The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Profiles | Salesforce
- URL:** https://teslatech2-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home
- Section:** Profiles
- Sub-Section:** All Profiles
- Table Headers:** Action, Profile Name, User License, Custom
- Table Data:** A list of profiles including:
  - Salesforce API Only System Integrations (User License: Salesforce Integration)
  - School profile (User License: Salesforce)
  - Silver Partner User (User License: Silver Partner)
  - Solution Manager (User License: Salesforce)
  - Standard Platform User (User License: Salesforce Platform)
  - Standard User (User License: Salesforce)
  - System Administrator (User License: Salesforce)
- Pagination:** 1-7 of 7, 0 Selected, Page 1 of 1

Salesforce Setup - Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty@00d2w00000rk1veead_580a9cckcvark@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	P.SACHINDRA	SP	sachindra@teslatech.sandbox		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	S.Parent	ps	parent@arcmr.com		<input checked="" type="checkbox"/>	School profile
<a href="#">Edit</a>	S.Principal	qa	principal@qa.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S.Teacher	ts	teachers@god.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	User_Integration	integ	integration@00d2w00000rk1veead.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00d2w00000rk1veead.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

Didn't find what you're looking for? Try using Global Search.

Salesforce Setup - Permission Sets

Permission Sets

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

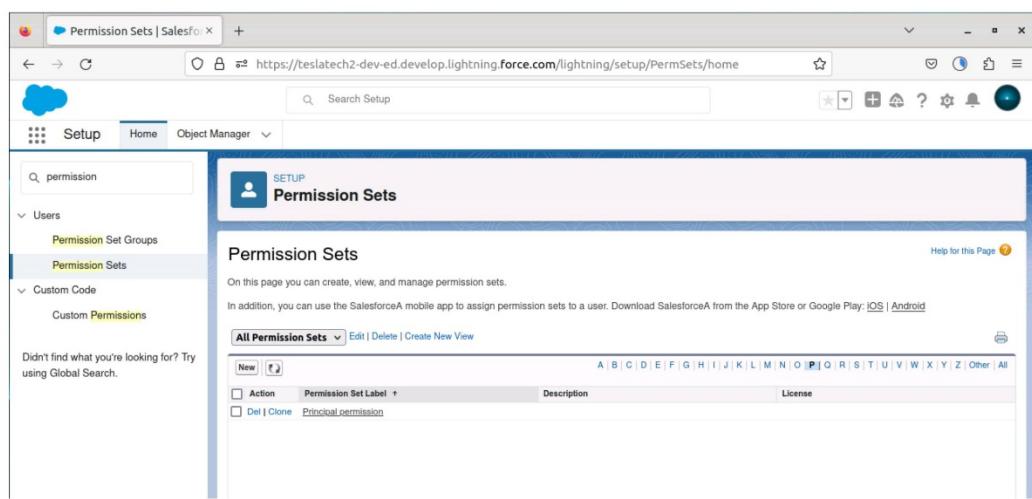
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<a href="#">New</a>	(empty)		
<a href="#">Del</a>   <a href="#">Clone</a>	Teacher permission		

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

Didn't find what you're looking for? Try using Global Search.



A screenshot of the Salesforce Setup interface showing the 'Permission Sets' page. The URL in the browser is <https://teslatech2-dev-ed.lightning.force.com/lightning/setup/PermSets/home>. The left sidebar shows navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area has a header 'Permission Sets' with a help link 'Help for this Page'. Below it, a sub-header 'Permission Sets' with a description: 'On this page you can create, view, and manage permission sets.' and '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](#)'. There are buttons for 'New' and 'Edit', and links for 'Delete' and 'Create New View'. A table lists permission sets, with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' and provides links for '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'.

#### 4. TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD. - <https://trailblazer.me/id/http:/vishp44>

TEAM MEMBER 1 - <https://trailblazer.me/id/surya21>

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

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

**[ADVANTAGES]****1. Better customer service**

Modern CRM software has many functions, but the software was created to improve business-customer relationships, and that's still its main benefit. A CRM manages all of your contacts and gathers important customer information—like demographics, purchase records and previous messages across all channels—and makes it easily accessible to anyone in your company who needs it. This ensures that your employees have all they need to know about the customer at their fingertips and can provide a better customer experience, which tends to boost customer satisfaction.

**2. Increased sales**

A CRM tool can help you streamline your sales process, build a sales pipeline, automate key tasks and analyze all of your sales data in one centralized place, potentially increasing sales and productivity. A CRM helps you establish a step-by-step sales process that your employees can rely on every time and that you can easily tweak as issues arise.

**3. Improved customer retention**

Once you've procured and converted leads, it's vital that you put in the work to retain them as customers and promote customer loyalty. High customer turnover can have many negative effects for your business, like diminished revenue or disrupted cash flow, so use your CRM and the information it provides about your customers to encourage repeat business. The CRM will provide sentiment analysis, automated ticketing, customer support automation and user behavior tracking to help you determine problems and quickly address them with your customers.

**4. Detailed analytics**

It's one thing to have plenty of data about your customers, but you need to know what it means and how to use it. CRM software typically has built-in analytic capabilities to contextualize data, breaking it down into actionable items and easily understood metrics. Metrics such as click-through rates, bounce rates, and demographic information allow you to judge the success of a marketing campaign and optimize accordingly.



### 5. Higher productivity and efficiency

CRM software uses marketing automation technology, which expedites menial tasks like drip campaigns and frees up your employees' time to focus on work only humans can handle, like creating content. It can also ensure that no tasks slip through the cracks (e.g., all important emails are always sent to the right people). Additionally, a CRM can show you a dashboard of how your business processes are working and where your workflows could improve. [Read related article: [How Workplace Automation Software Can Help Your Business](#)]

### 6. Automated sales reports

Your team can easily collect and organize data about prospective and current customers using the CRM software's dashboard and reporting features, which allow employees to automate and manage their pipelines and processes. The CRM can also help your team members evaluate their performance, track their quotas and goals, and check their progress on each of their projects at a glance.

## [DISADVANTAGES]

### 1. A costly project

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data mitigation, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

### 2. Have poor usability

Some CRM systems could be more user-friendly as users need to learn how to use CRM to save time and energy to make the system work according to them. Some small businesses try to refrain from using CRM as they need help handling it.



### 3. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

### 4. Having lots of security concerns

There are many security issues with CRM, such as data loss and data being hacked by someone. In CRM, the collected data is stored at one centralized location that can be accessed by unfair means. In another case, inaccurate data can be added by employees, or they manipulate figures leading to wrongful planning.

### 5. Not suitable for every business

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't connect to the customers directly therefore, they don't need a CRM tool. Forming CRM to make it function properly company or business has to spend a lot of money, including various phases.

### 6. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

### 7. Experience-based procedure in all the stages

Small businesses may not require it, but large businesses use CRM on a large scale. For this purpose, they train their employees by providing training sessions from the appointed professionals. The company invests in employee training to improve its productivity, where employees encounter and learn the various features and functions of CRM. This experience will help them in all the stages of CRM.

**Applications of a CRM – Examples and Strategies**

- \* Application 1: Tracking Customers
- \* Application 2: Collecting Data for Marketing
- \* Application 3: Improving Interactions and Communications
- \* Application 4: Streamlining Internal Sales Processes
- \* Application 5: Planning Your Operations.

Business is an ongoing process that has to update itself with time (adopt new technologies) to remain in the competition.

Before technology, customer data or CRM was based on papers, but slowly, companies started tracking customer-related data with spreadsheets, emails, address books, and other ways.

But due to a lack of automation and integration, it becomes difficult for them to find and share up-to-date information when required quickly. It also down their ability to create marketing strategies, provide customers flawless service, and peruse new sales leads.

CRM is a powerful tool that automatically collects information about existing and prospective customers (their personal or professional information, including social media posts, phone numbers, email addresses, phone numbers, service, purchase history, and support tickets). Further, the whole information is integrated by the system and generates consolidated profiles that can be shared with appropriate teams. One of the best features of CRM is that it can connect with other business tools, such as document-sharing apps and online chat.

Artificial intelligence and business intelligence capabilities are built in CRM that accelerate administrative tasks and provide actionable insights. Customer relationship management's advantages and disadvantages will help you understand it in detail.



(Image result for crm future scope)

“[The future of CRM] is about what needs to be done to meet the changing needs and the expectations. Customers expect companies to know them and expect to have conversations with them.”

