

PROJECT REPORT TEMPLATE

1. INTRODUCTION

1.1 Overview

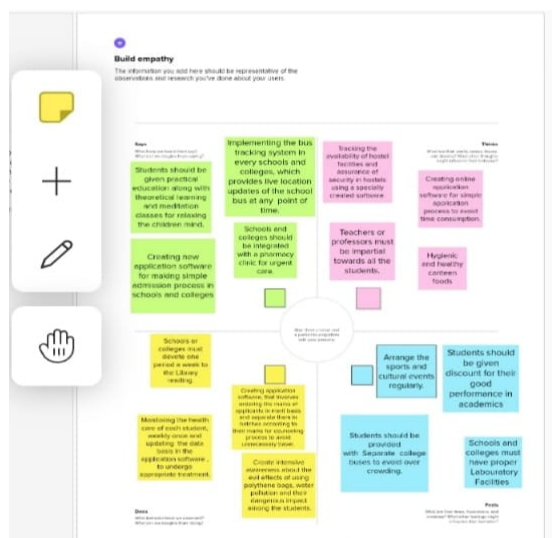
A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

1.2 Purpose

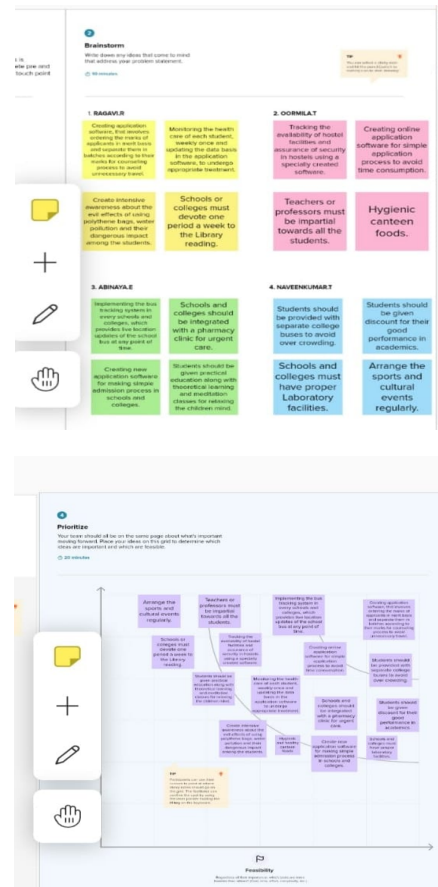
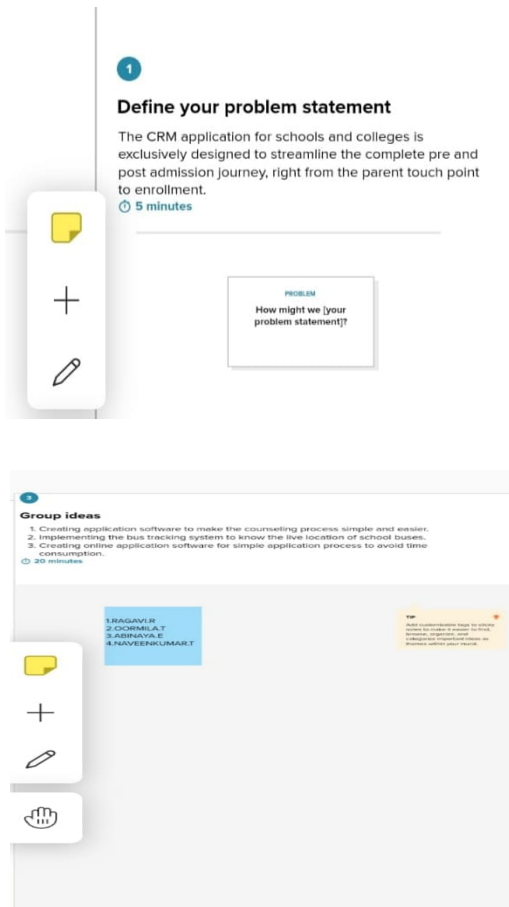
- ***Improve Student Admissions Lifecycle***
- ***Keep Alumni Information Safe and Accessible***
- ***Stay Connected with Teams***
- ***Monitor Fee Payments and Reminders***
- ***Track and Gain Insight on Organization-Wide Data and Processes***

2. PROJECT DEFINITION AND DESIGN THINKING

2.1 Empathy Map



2.2 Ideation and Brainstorming Map



3. RESULT

3.1 Data Model

Object Name

Fields in the object

	Field Label	Data Type
School	Address	Text Area
	District	Text Area
	State	Text Area
	School Website	Text Area
	Phone Number	Phone
	Students	ofRoll-up summary
	Highest Marks	Roll-up summary

	Field Label	Data Type
Student	Phone Number	Phone
	School	Master-Detail Relationship

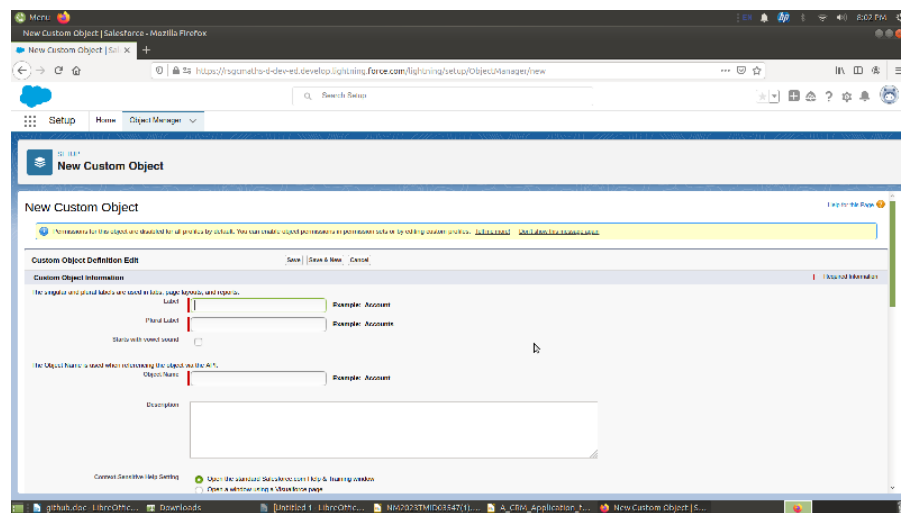


Edit with WPS Office

	Results	Pick-List
	Class	Number
	Marks	Number
Parent	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity and Screenshot

- For this school management, we need to create 3 custom objects i.e, School, Parents and Students.



Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

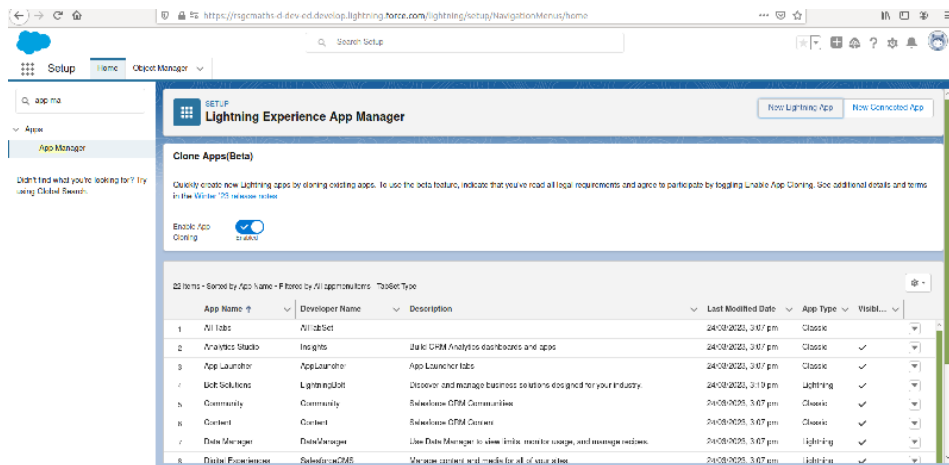
☐ Allow Search

Object Creation Options (Available only when custom object is first created)

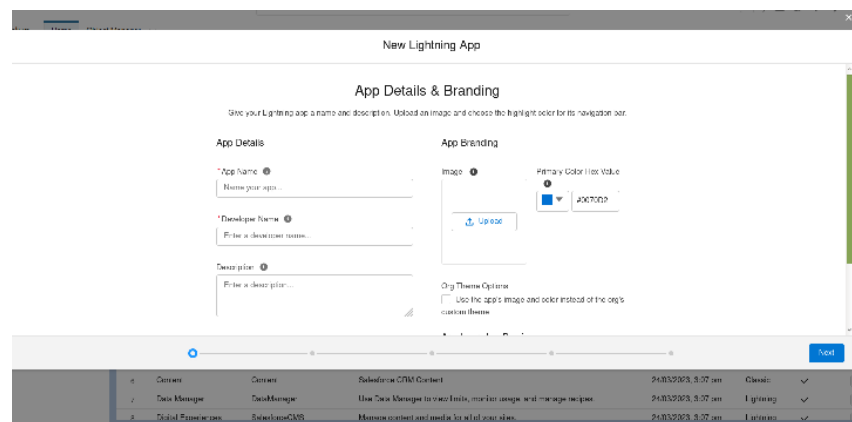
☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

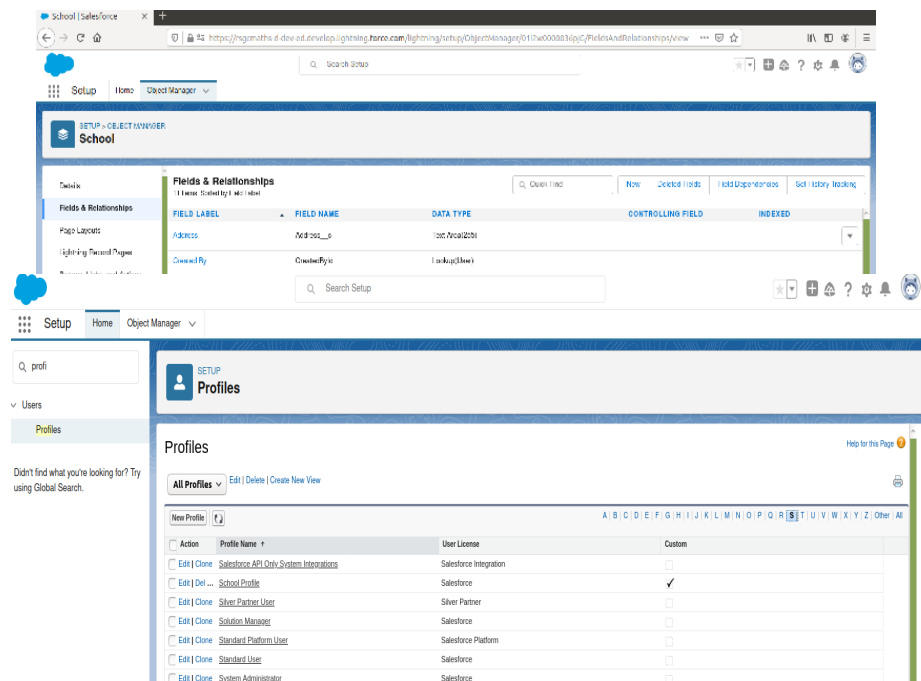
- Now creating school management app in Lightning App.



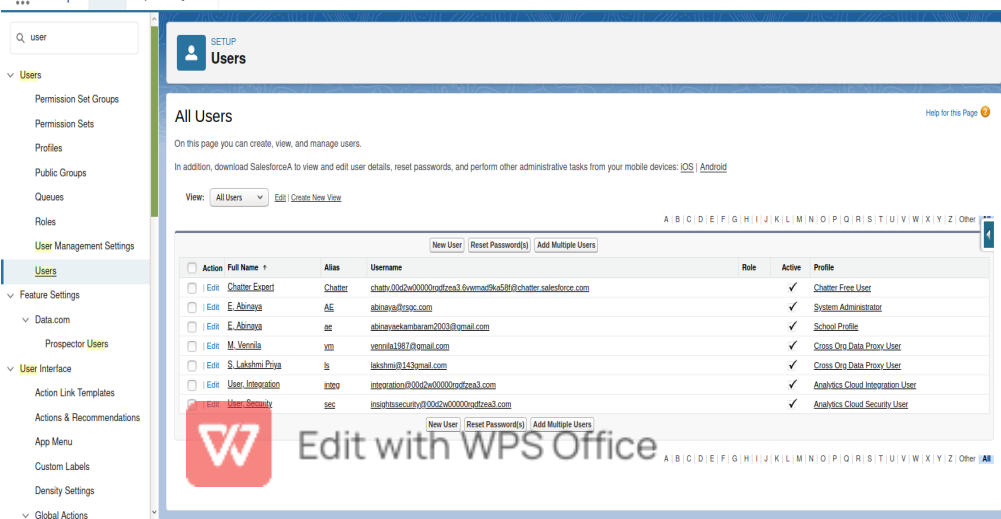
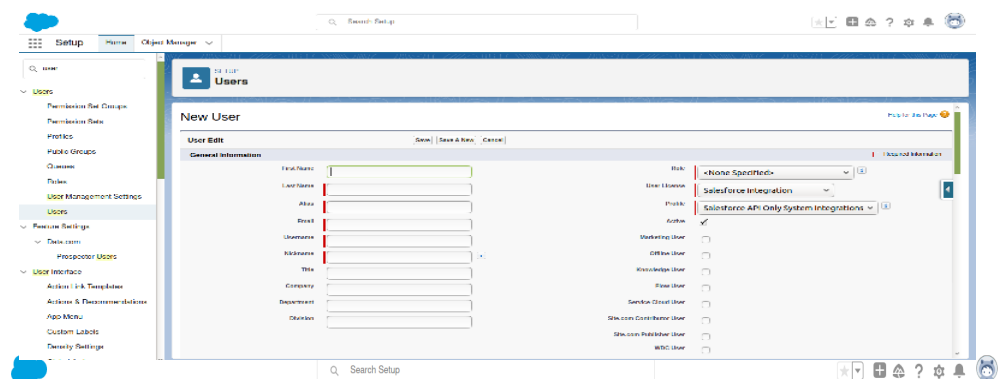
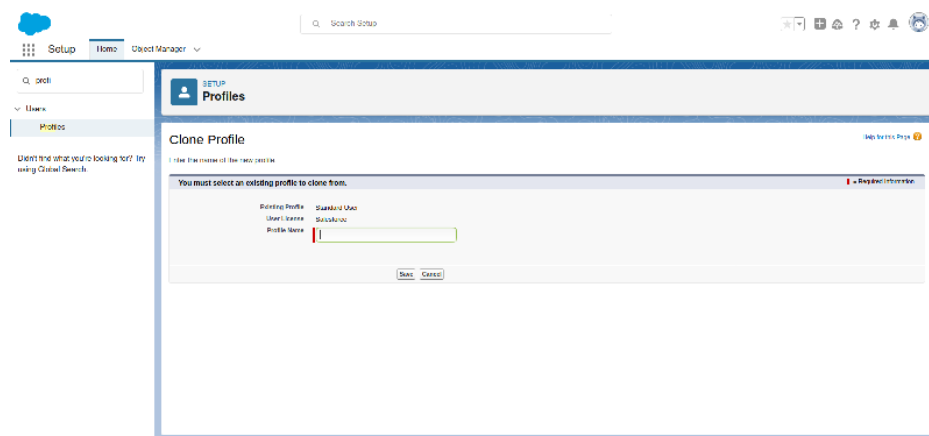
- **By clicking new lightening app, we have to create app name as School Management for this project.**



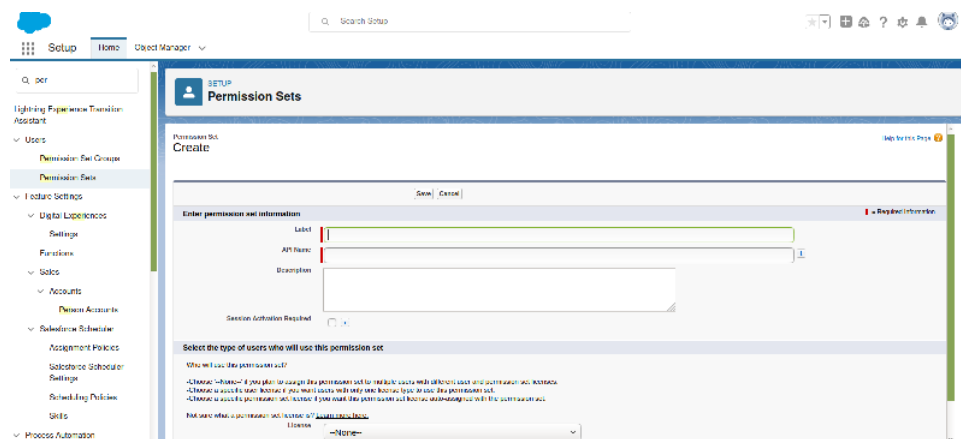
- **Creation of field for custom objects i.e, school, students and parents. This is done so that users view records, they can also see and access data.**



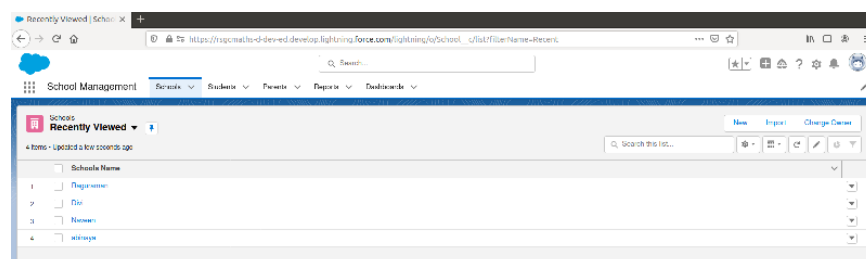
- **Creating a User. Every user in salesforce has a user account.**



- **Creating Permission sets**



- **Finally after completing those task, we get the report of our project and dashboard too.**



4. TRAILHEAD PROFILE PUBLIC URL

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

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

Team Member 2 - <https://trailblazer.me/id/r1352002>

Team Member 3 - <https://trailblazer.me/id/naveenk5>

5. ADVANTAGES

- *Build long lasting Alumni relations.*
- *Personalized communication.*
- *Improved student engagement.*
- *Improved enrollment.*
- *Trustworthy reporting.*

DISADVANTAGES

- *Poor communication.*
- *Lack of Technology Integration.*
- *Lack of leadership.*
- *Having lots of security concerns.*
- *Employees training is must.*

6. APPLICATIONS

- *Generate reports and graphs so you can analyse progress.*
- *Store and search all your contacts easily with grouping functions.*
- *A real-time ability to share documents and key information with faculties, support staff and key stakeholders to reduce admin tasks.*
- *A daily update of student data pulled from the registry system ensures you have the latest information available.*

7. CONCLUSION

The ultimate goal of the discipline of customer relationship management and associated CRM systems, is efficiently managing and improving business relationships.

8. FUTURE SCOPE

- *CRM is predicted to become more powerful to support customer first, not company first businesses.*
- *Bringing together disparate teams, data, and system integrations.*



- *The CRM of the future is set to be centralized and empowered by AI and mobile capabilities.*
- *Keeping customer happy thereby keeps them coming back.*



