

# **A CRM APPLICATION FOR SCHOOLS/COLLEGES**

## **INTRODUCTION**

### **1.1 Overview**

Customer relationship management (CRM) is a process in which a business or other organization administers its interactions with customers, typically using data analysis to study large amounts of information. CRM systems compile data from a range of different communication channels, including a company's website, telephone, email, live chat, marketing materials and more recently, social media. They allow businesses to learn more about their target audiences and how to best cater for their needs, thus retaining customers and driving sales growth. CRM may be used with past, present or potential customers. The concepts, procedures, and rules that a corporation follows when communicating with its consumers are referred to as CRM. This complete connection covers direct contact with problem and potential customers.

### **1.2 Purpose**

The concepts, procedures, and rules that a corporation follows when communicating with its consumers are referred to as CRM. This complete connection covers direct contact with customers, such as sales and service-related operations, forecasting, and the analysis of consumer patterns and behaviors, from the perspective of the company. According to Gartner, the global CRM market size is estimated at \$69 billion in 2020.

## **PROBLEM DEFINITION & DESIGN THINKING**

### **Empathy Map**

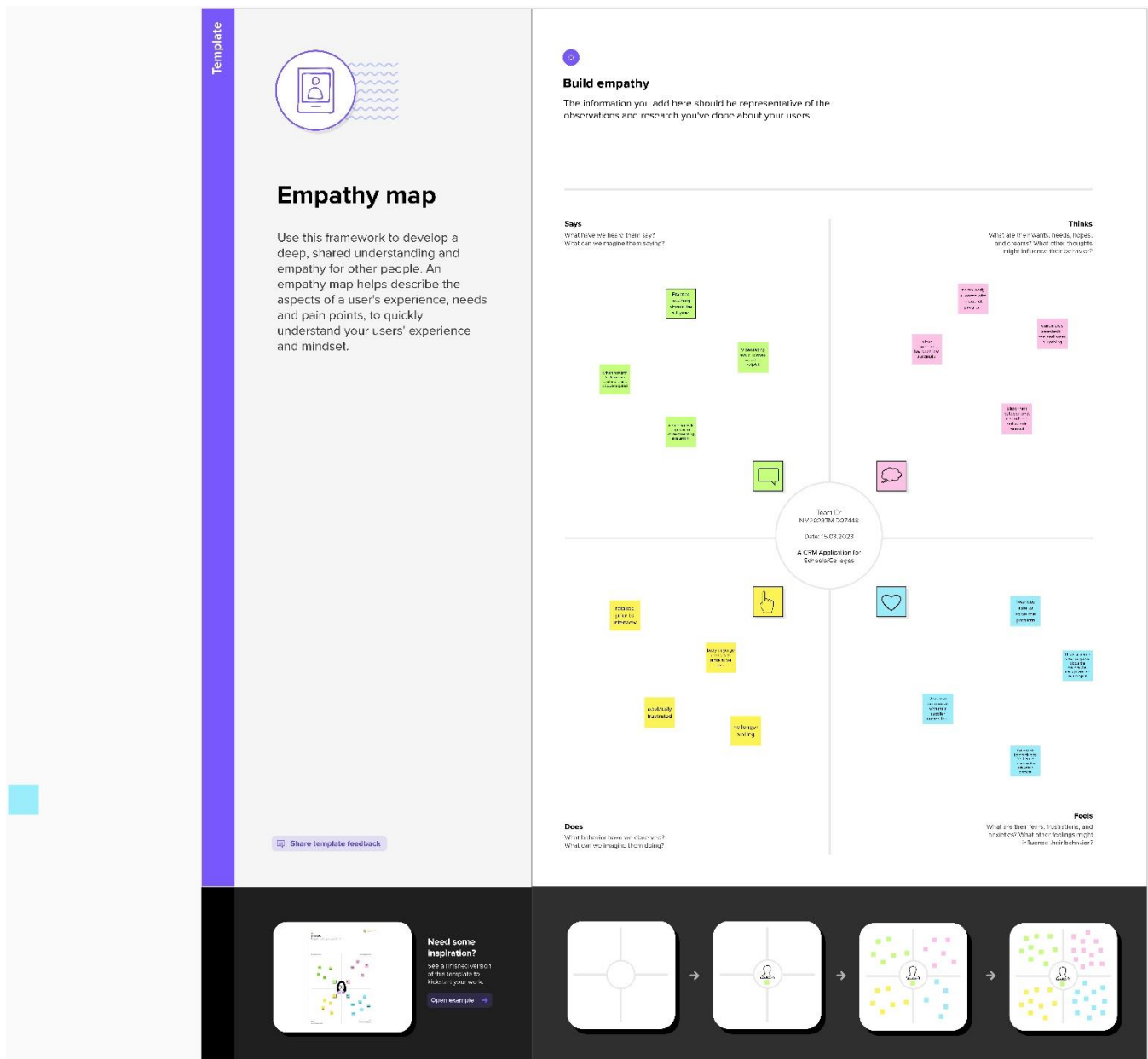


Figure 1- Empathy map on Vehicle System Management done by Our Team

## Ideation & Brainstorming Map

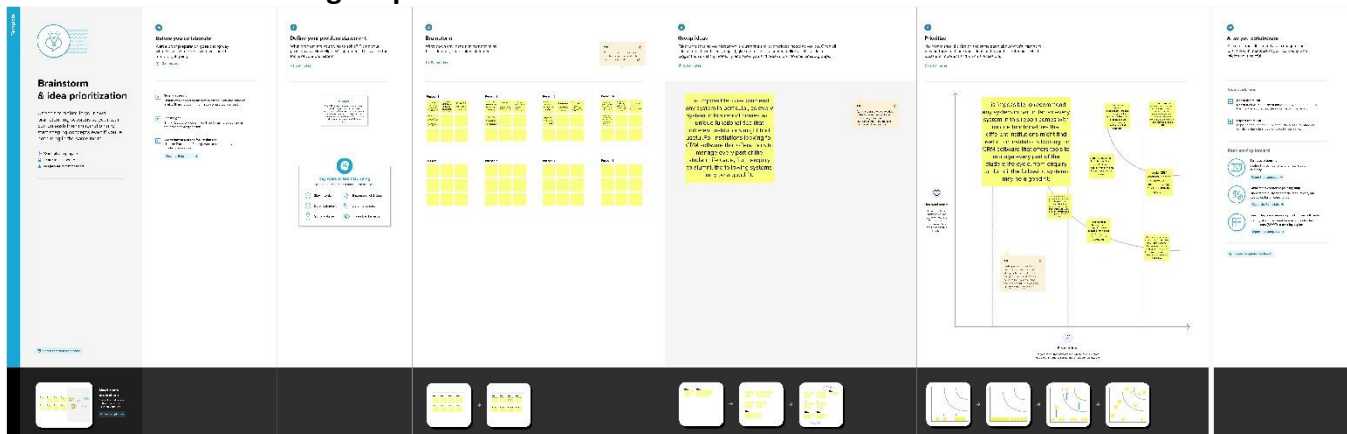
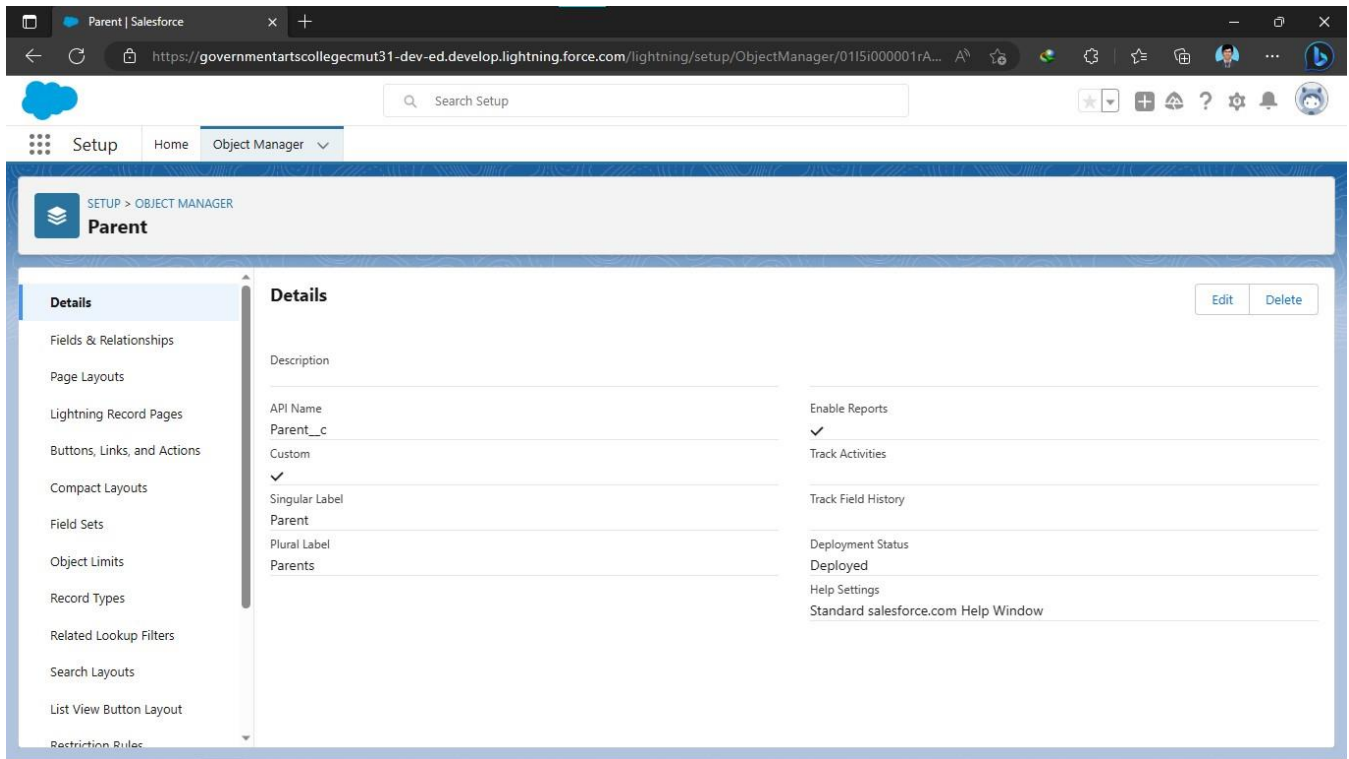


Figure 2 - Brainstorm map on Vehicle System Management done by Our Team

**RESULT****Data Model:**

Object name	Fields in the Object	
School	<b>Field label</b>	<b>Data type</b>
	Phone Number	Phone
	Number of Students	Rollup Summary
	Highest Marks	Rollup Summary
Student	<b>Field label</b>	<b>Data type</b>
	Phone Number	Phone
	School	Master Detail Relationship
	Results	Picklist
	Class	Number
Parent	<b>Field label</b>	<b>Data type</b>
	Parent Address	Text
	Parent Number	Data Type
	Highest Marks	Rollup Summary

## ACTIVITY & SCREENSHOTS



This screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Details' and includes fields for 'API Name', 'Singular Label', 'Plural Label', and 'Custom'. It also has checkboxes for 'Enable Reports', 'Track Activities', and 'Track Field History'. The 'Deployment Status' is set to 'Deployed'.

**Details**

API Name: Parent\_\_c

Custom: ✓

Singular Label: Parent

Plural Label: Parents

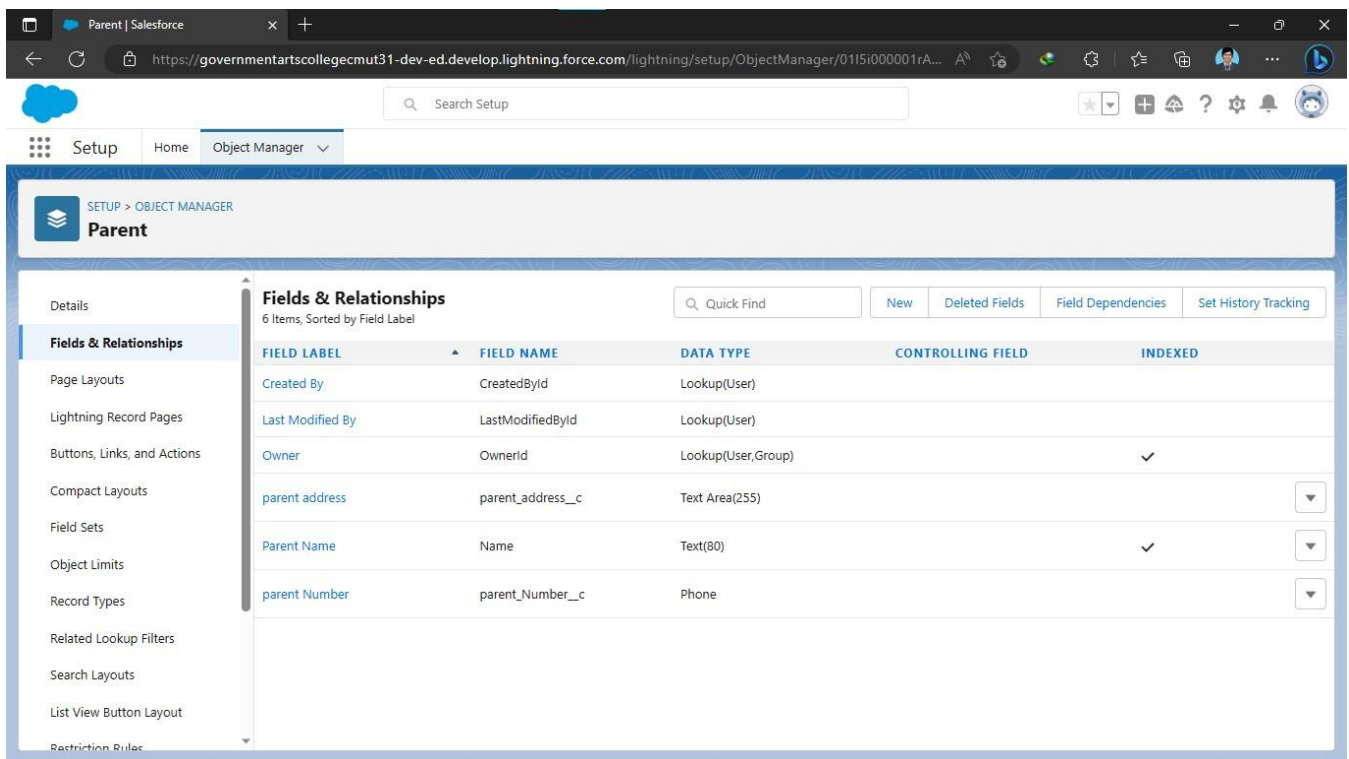
Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window



This screenshot shows the 'Fields & Relationships' section for the 'Parent' object. It displays a table with 6 items, sorted by Field Label. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The items listed are 'Created By', 'Last Modified By', 'Owner', 'parent address', 'Parent Name', and 'parent Number'.

**Fields & Relationships**

6 Items, Sorted by Field Label

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		

Student | Salesforce

https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rA...

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

Search Layouts

List View Button Layout

Restriction Rules

**Details**

Description

API Name  
Student\_\_c

Custom

✓

Singular Label  
Student

Plural Label  
Students

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

Student | Salesforce

https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rA...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Student**

**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)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
Student Name	Name	Text(80)		✓

School | Salesforce

https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rA...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**School**

Details Edit Delete

Description

API Name  
School\_\_c

Custom  
✓

Singular Label  
School

Plural Label  
Schools

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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List View Button Layout

Restriction Rules

School | Salesforce

https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rA...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**School**

Details

**Fields & Relationships**

9 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(30)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text(30)		
Last Modified By	LastModifiedById	Lookup(User)		
Phone Number	Phone_Number__c	Phone		
school	school__c	Master-Detail(Student)		✓
School Name	Name	Text(80)		✓
School Websites	School_Websites__c	Text(30)		
State	State__c	Text(30)		

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

School Management - Lightning

[https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u51000000C2...](#)

Lightning App Builder

App Settings

Pages

School Management

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

App Branding

\*App Name

School Management

\*Developer Name

School\_Management

Description

Enter a description...

Image

Upload

Primary Color Hex Value

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

SM

School Management

Profiles | Salesforce

[https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address...](#)

Setup

Home

Object Manager

Search Setup

profile

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profile

School profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

Edit

Clone

Delete

View Users

Name	School profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Anupriya Arikurushnan, 11/04/2023, 12:56 pm	Modified By	Anupriya Arikurushnan, 11/04/2023, 12:57 pm

Page Layouts

Global	Global Layout <a href="#">View Assignment</a>	Object Milestone	Object Milestone Layout <a href="#">View Assignment</a>
Email Application	Not Assigned <a href="#">View Assignment</a>	Operating Hours	Operating Hours Layout <a href="#">View Assignment</a>
Home Page Layout	DE Default <a href="#">View Assignment</a>	Opportunity	Opportunity Layout <a href="#">View Assignment</a>
Account	Account Layout <a href="#">View Assignment</a>	Opportunity Product	Opportunity Product Layout <a href="#">View Assignment</a>
Alternative Payment Method	Alternative Payment Method Layout <a href="#">View Assignment</a>	Order	Order Layout <a href="#">View Assignment</a>



Users | Salesforce

[https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home](#)

Search Setup

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

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 User

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Arikurshnan Anupriya	AAnrik	aanuoriva@physics.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Albi Kavitha	kaalbi	anuamutha25112003@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5i00000bvtzineal.tvenooezhvod@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	gupta_devid	gud	anuamutha@sample.com		<input checked="" type="checkbox"/>	School profile
<input type="checkbox"/> Edit	Ram Subi	sram	anuamutha25112003@example.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5i00000bvtzineal.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5i00000bvtzineal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

Permission Sets | Salesforce

[https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home](#)

Search Setup

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

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

New

Reset

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Se...
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Shopper	Limited access to Order Management features for Self Ser...	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Store Associate	Access to limited features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Del   Clone	Principal Permission	Lets users create, read, edit, and delete queued parties as...	Queue Manager
<input type="checkbox"/> Clone	Queue Manager		
<input type="checkbox"/> Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integr...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	Security Center Integration User	Access Security Center for Integration	Cloud Integration User

1-27 of 27

0 Selected

Previous

Next

Page 1 of 1



New Accounts Report | Salesforce

https://governmentartscollegecmut31-dev-ed.develop.lightning.force.com/lightning/r/Report/000510000072jhiEAA/view?...

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Report: Accounts  
New Accounts Report

Enable Field Editing Add Chart Edit

Total Records  
12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Anupriya Arikiran	GenePoint	CA	Customer - Channel	Cold	11/04/2023
2	-	Anupriya Arikiran	United Oil & Gas, UK	UK	Customer - Direct	-	11/04/2023
3	-	Anupriya Arikiran	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	11/04/2023
4	-	Anupriya Arikiran	Edge Communications	TX	Customer - Direct	Hot	11/04/2023
5	-	Anupriya Arikiran	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	11/04/2023
6	-	Anupriya Arikiran	Pyramid Construction Inc.	-	Customer - Channel	-	11/04/2023
7	-	Anupriya Arikiran	Dickenson plc	KS	Customer - Channel	-	11/04/2023
8	-	Anupriya Arikiran	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	11/04/2023
9	-	Anupriya Arikiran	Express Logistics and Transport	OR	Customer - Channel	Cold	11/04/2023
10	-	Anupriya Arikiran	University of Arizona	AZ	Customer - Direct	Warm	11/04/2023
11	-	Anupriya Arikiran	United Oil & Gas Corp.	NY	Customer - Direct	Hot	11/04/2023
12	-	Anupriya Arikiran	sForce	CA	-	-	11/04/2023

To Do List

## TRAILHEAD PROFILE PUBLIC URL

- Team Lead - <https://trailblazer.me/id/anuamutha>
- Team Member 1 - <https://trailblazer.me/id/aasokan19>
- Team Member 2 - <https://trailblazer.me/id/aarul32>
- Team Member 3 - <http://trailblazer.me/id/balag75>

## ADVANTAGES & DISADVANTAGES

### Advantages

#### 1. Beneficial for the different departments or teams of the business

Customer relationship management automation systems can benefit small and large businesses and their teams, such as marketing, sales, customer service, field service, and project service automation teams in different aspects. Together they raise the business's growth chart by increasing the product's productivity. With this, CRM is capable of improving and simplifying complex customer engagement.

#### 2. Customers are engaged across multiple channel

There are various advantages of using a CRM system for a business as it provides the best possible customer service by improving customer service, customer retention, tracking customer data,

streamlining operations, reducing costs, and taking the business to the next level. The CRM can engage the user with its customer across multiple channels like email, social media, live chat, and phone. You can connect with your customer on any platform and track customer interaction in one place, which helps get a complete picture of each customer.

### 3. Provide streamline operations

A properly implemented CRM in business provides streamlined operations by automating tasks such as contact, order fulfillment, customer management, and lead tracking. Streamlining the functioning of CRM operations helps focus on more strategic activities for the business and saves money and time.

### 4. Improve customer service

Customer relationship service is designed to interact with customers and store their data in one place. It helps in maintaining good customer relationships and gives customer satisfaction. With the help of CRM, the customer service team can listen to customers' problems and resolve them quickly and efficiently. With this, teams can contact every customer to offer assistance before problems arise.

## **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 migration, integration cost, training, and support also affect.

### 2. Loss of collected information or records

CRM (customer relationship management) tools can be responsible for losing the customer's information as some CRM software keeps track of customers' information using remote internet connections. Due to this, sometimes organization needs to have control over the customer's information (detailed), especially when a system failure event happens. An unstable CRM can result in the loss of money in revenue for the company in the future.

### 3. 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 requirements. work according to their

### **APPLICATIONS**

A good CRM helps you understand your market and the needs of your customers. As you attract more customers, a CRM makes two things clear: who is interested in what you have to offer, and what is most important to them.

When it comes to winning more customers, a CRM helps you make smarter decisions than your competition and offer people what they truly want. And if customers leave or your sales stagnate, you can see common threads and change the process accordingly, to better meet their needs and retain them.

When you're working in spreadsheets and scrolling through email chains, it's hard to get a big picture of all the important data about current and future customers. A CRM saves important data in extensive customer and contact lists.

This makes it easy and efficient to market directly to them based on particular criteria

A good CRM helps you maintain great customer relationships with all your clients and let them know what your products and services can do for them.

### **CONCLUSION**

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.

## **FUTURE SCOPE**

These days, numerous small and Tmedium-sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement CRM software. However, the preferences and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.

Moreover, the companies didn't have the expertise to manage the CRM software inhouse. Hence, they were bound to hire designated technicians. These technicians used to charge a lump sum amount in exchange for their services. As a result, the cost used to be the most discouraging factor for small and medium enterprises.

If we notice today's scenario, then the CRM software has become quite affordable. Even many developers are providing CRM software for free. Since most CRMS are web-based software, the upgradation of infrastructure does not become necessary. Hence, it is a great way to save your expenses.