

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

## **1. INTRODUCTION**

### **1.1 Overview**

Salesforce Customer 360 is our entire portfolio of products and services. It's an integrated customer relationship management (CRM) platform that helps companies transform their businesses by uniting their marketing, sales, commerce, service, and IT teams with a single, shared customer view. It allows businesses to consolidate customer data from various sources, such as sales, marketing, service, and commerce, into a single, unified customer profile. This provides a holistic understanding of customer interactions, preferences, and behaviors, which can help businesses optimize customer engagement.

Salesforce Platform is a cloud-based technology platform that enables businesses to build, integrate, and deploy custom applications and solutions that meet their specific needs. It is a comprehensive platform that provides tools and services for application development, data integration, mobile app development, and more. At its core, Salesforce Platform is built on a multi-tenant architecture that allows multiple customers to share the same infrastructure and resources. This means that customers can benefit from economies of scale, as well as automatic updates and maintenance, without having to worry about hardware or software infrastructure.

Trailhead is an online learning platform created by Salesforce to provide free, self-paced learning on a variety of topics related to Salesforce products and services. It offers interactive tutorials, hands-on challenges, and quizzes that allow users to learn at their own pace and earn badges and points for completing tasks.

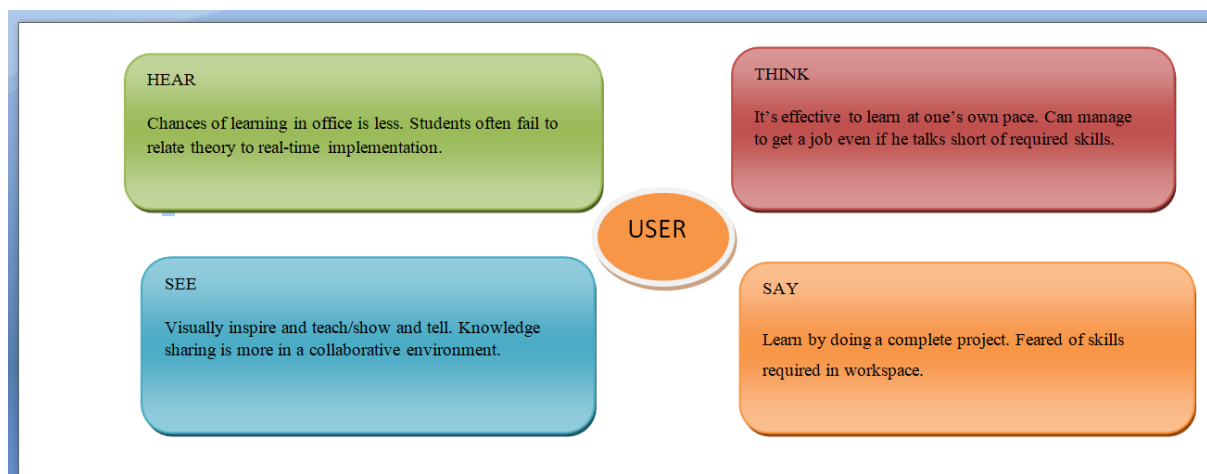
The platform is designed to be accessible to anyone, regardless of their prior knowledge or experience with Salesforce. Users can choose from a variety of learning paths and modules, ranging from basic concepts to advanced topics, to build their skills and gain expertise in Salesforce.

## 1.2 Purpose

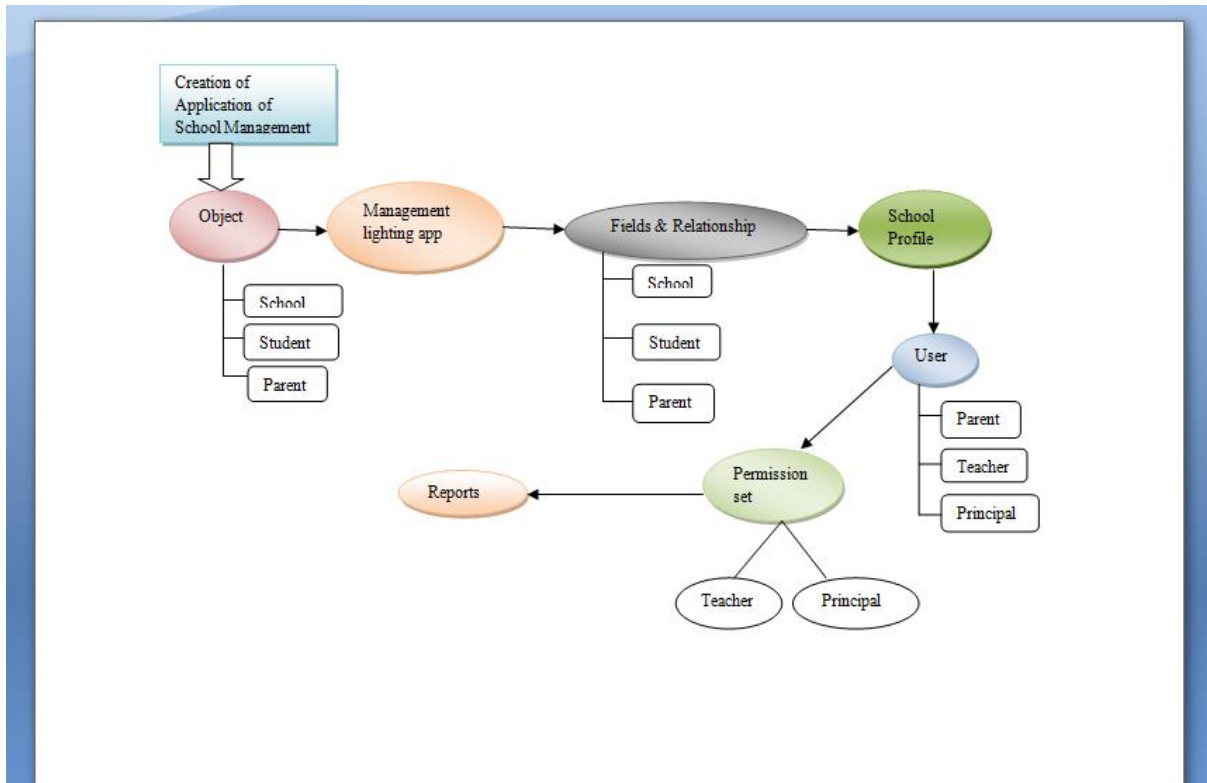
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this they will gain knowledge and can include it into their resume as well.

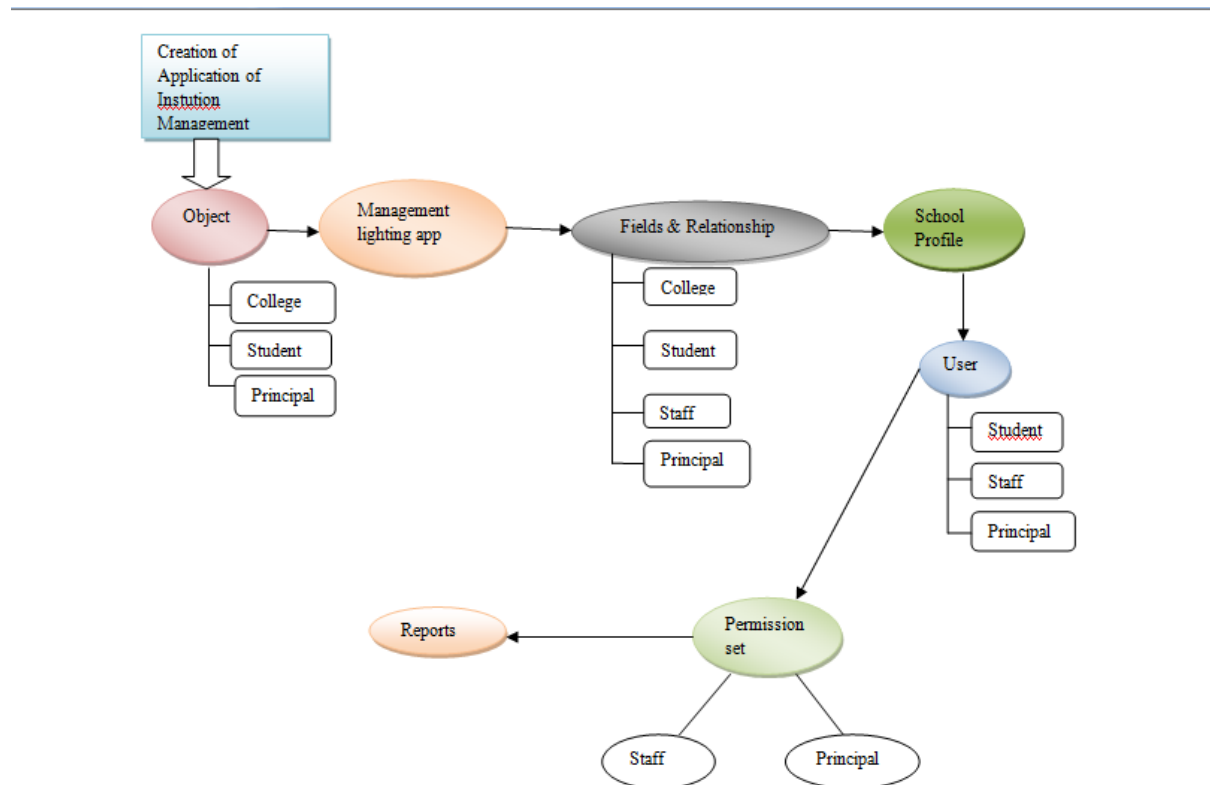
## 2.Problem Definition & Design Thinking

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map





### 3. RESULT

#### 3.1 Data Model:

Object Name	Fields in the object	
Obj1 School	Field Label	Data Type
	Address	Text Area
	Phone Number	Phone
	Numer of students	Roll-up summary

Obj2 Student	Field Label	Data Type
	Phone Number	Phone
	School	Master-Detail Relationship
	Result	Picklist
	Class	Number
Obj3 Parent	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

### 3.2 Activity & Screenshot

#### Milestone2-Object

#### Activity-1: Creation of School Object

Creation of Objects for School Management:

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:
- Label: School
- Plural Label: Schools
- Record Name: School Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox.

- Click Save.

The image displays two screenshots of the Salesforce 'New Custom Object' setup page. The top screenshot shows the 'Custom Object Information' section, which includes fields for Label (school), Plural Label (schools), Object Name (school), and Description. The bottom screenshot shows the 'Enter Record Name Label and Format' section, which includes fields for Record Name (School Name), Data Type (Text), and various optional features like Allow Reports, Allow Activities, and Allow Search.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

## **Activity 2: Create student object**

1. Click on the gear icon Activity
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:
- Label: Students
- Plural Label: Students
- Record Name: Student Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

## **Activity 3: Create parent object**

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.

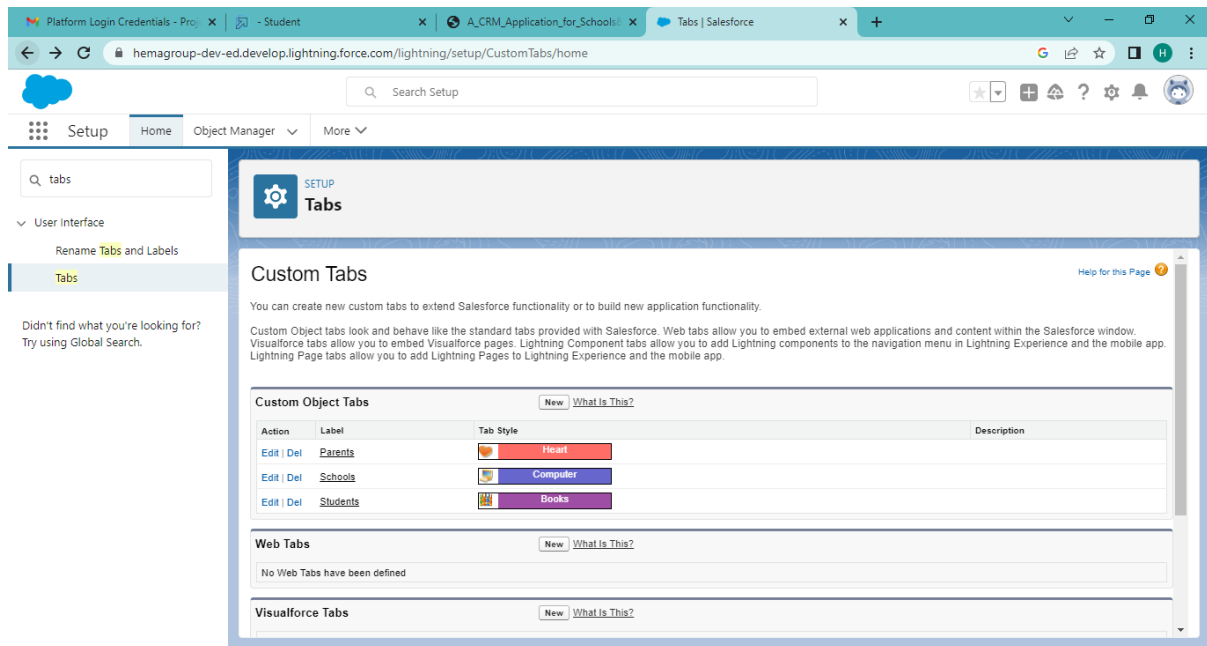


3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:
- Label: Parent
- Plural Label: Parents
- Record Name: Parent Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

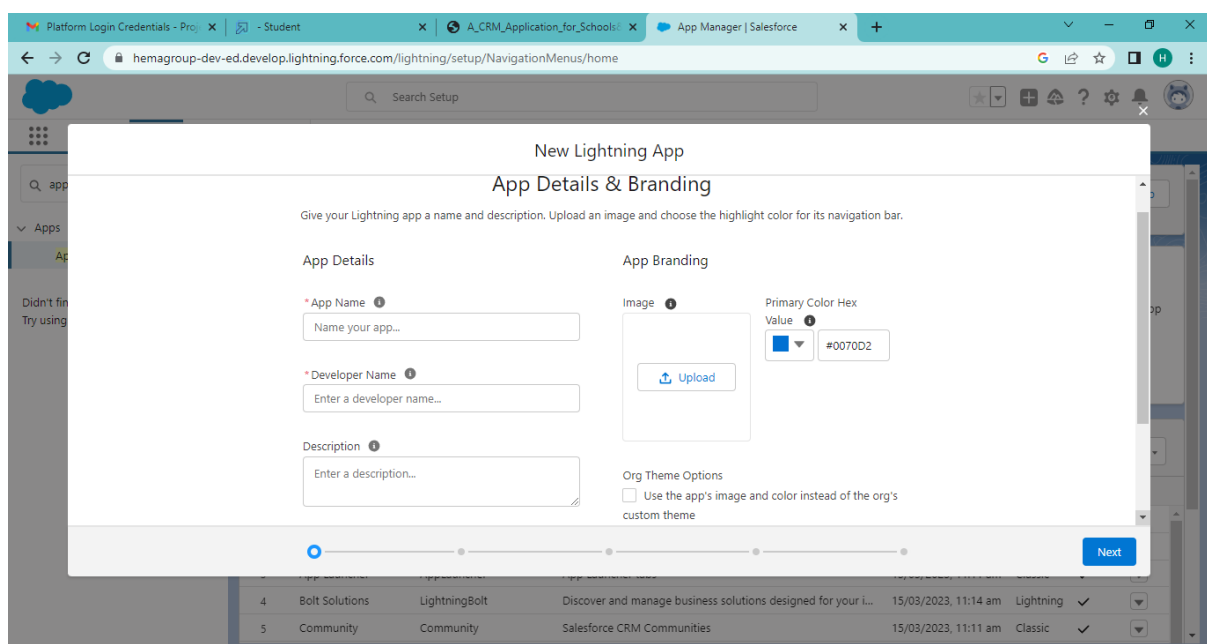
1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



## Milestone-3: Lightning App

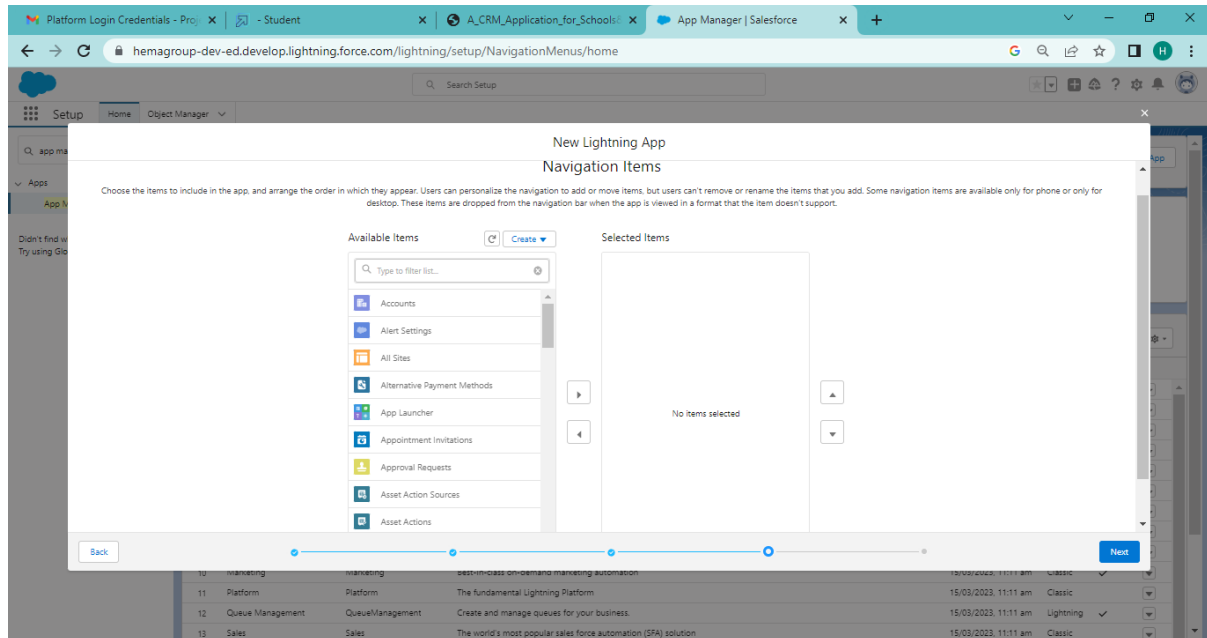
### Activity: Create the School Management app

- From Setup, enter App Manager in the Quick Find and select App Manager and select App Manager.
- Click New Lightning App. Enter School Management as the App Name, then click Next.

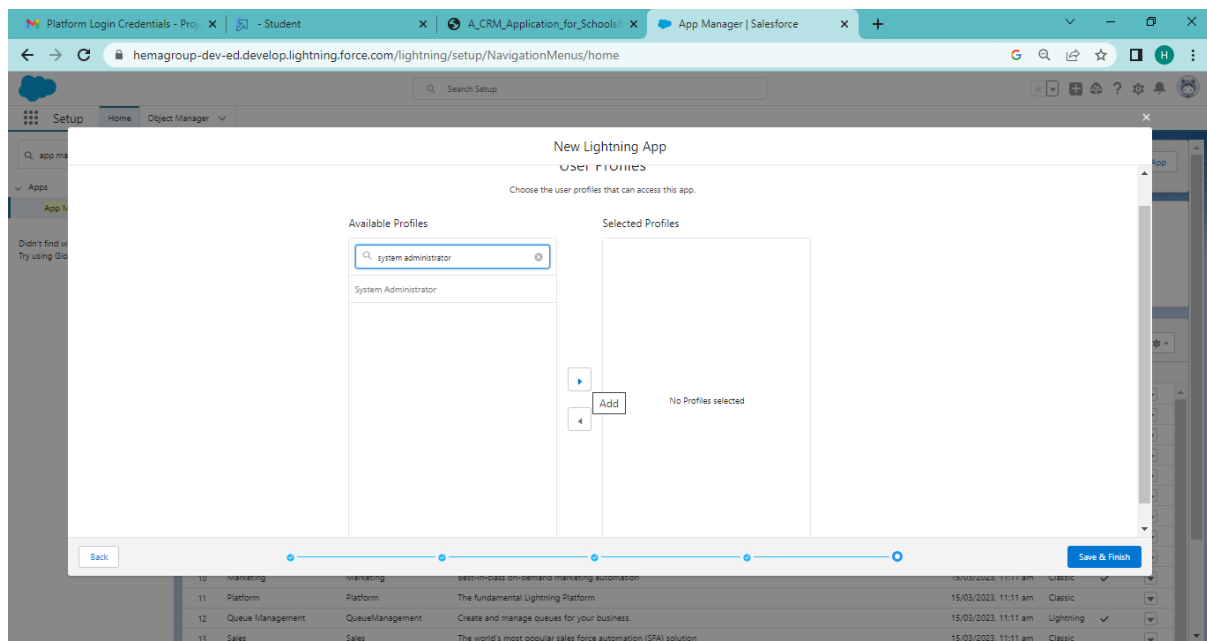


- Under App Options, leave the default selections and click Next.

- Under Utility Items, leave as is and click Next.
- From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.



- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



- To verify your changes, click the App Launcher, type School Management and select the School Management app.

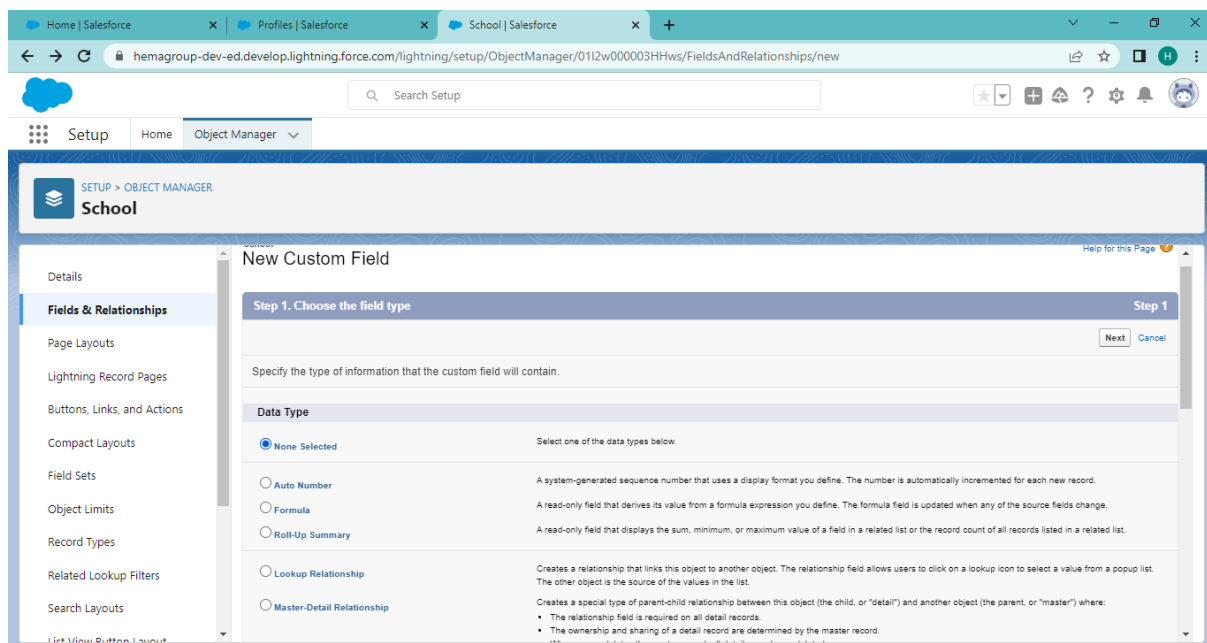
Note:

1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

## Milestone -4:Fields and Relationship

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

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation, and click New



Now we're ready to make a custom field. Let's do this!

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Address.
3. Click Next, Next, then Save & New.

4. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field labels.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The browser tabs at the top include 'Home | Salesforce', 'Profiles | Salesforce', and 'School | Salesforce'. The address bar shows the URL: [hemagroup-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003HHws/FieldsAndRelationships/new](https://hemagroup-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003HHws/FieldsAndRelationships/new). The left sidebar shows the navigation menu with 'Setup' selected, and 'Object Manager' expanded. The main content area is titled 'School New Custom Field' and shows 'Step 2. Enter the details'. The form fields include: 'Field Label' (empty), 'Field Name' (empty), 'Description' (empty), 'Help Text' (empty), 'Required' (checkbox, unchecked), 'Auto add to custom report type' (checkbox, checked), and 'Default Value' (empty). The 'Next' button is visible in the top right corner of the form.

Now let's create the other fields and we must choose the data types of the fields carefully  
Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type . Lets see this

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

Lets create Roll-up summary fields to calculate the number of students

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Number of students
5. Click Next

6. Then select the master object summarized as students and then select count as roll-up and then click Next,Next and save.

1. From Setup, click Object Manager and select School.

2. Click Fields & Relationships, then New.

3. Select the Roll-up summary field as data type

4. Enter the field label as Highest Marks

5. Click Next

6. Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate.click Next,Next and save.

The screenshot shows the Salesforce Object Manager interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 11 items sorted by Field Label. The table below shows the details of the fields:

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)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX 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__c	Phone		

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

1. Select the Phone as the Data Type, then click Next.

2. For Field Label, enter Phone Number.

3. Click Next, Next, then Save & New

Let's create a master-detail relationship with school object

1. Select Master-Detail Relationship as the Data Type and click Next.

2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.

Lets create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
6. Pass
7. Fail
8. Click Next, Next, then Save & New

Lets create a Number field:

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

Student | Salesforce

hemagroup-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003HHyt/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Student

Details

**Fields & Relationships**  
8 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)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

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

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.
4. Select the Phone as the Data Type, then click Next.
5. For Field Label, enter Parent Number.
6. Click Next, Next, then Save & New



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

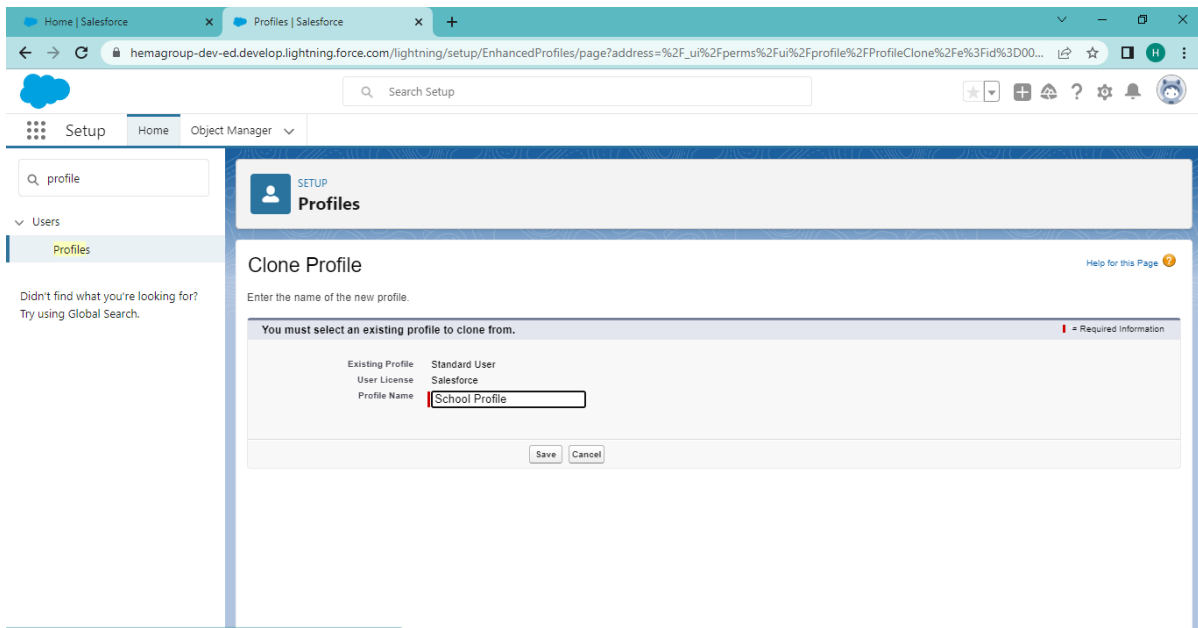
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

## Milestone-5: Profile

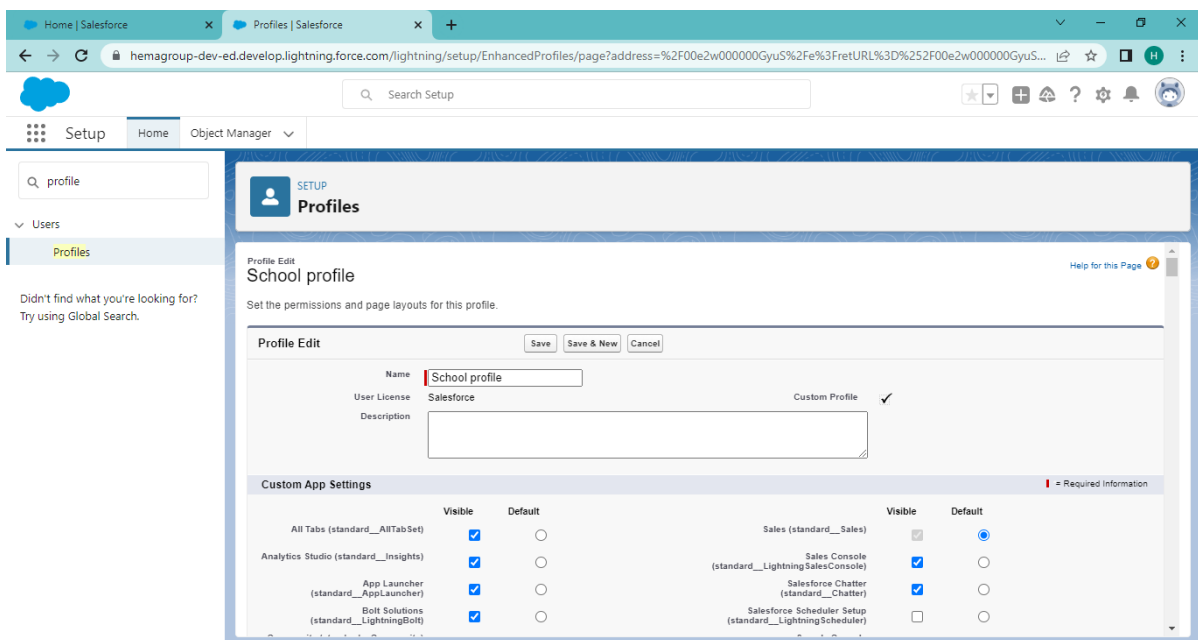
### Activity: Creation on profile:

From Setup enter Profiles in the Quick Find box, and select Profiles.

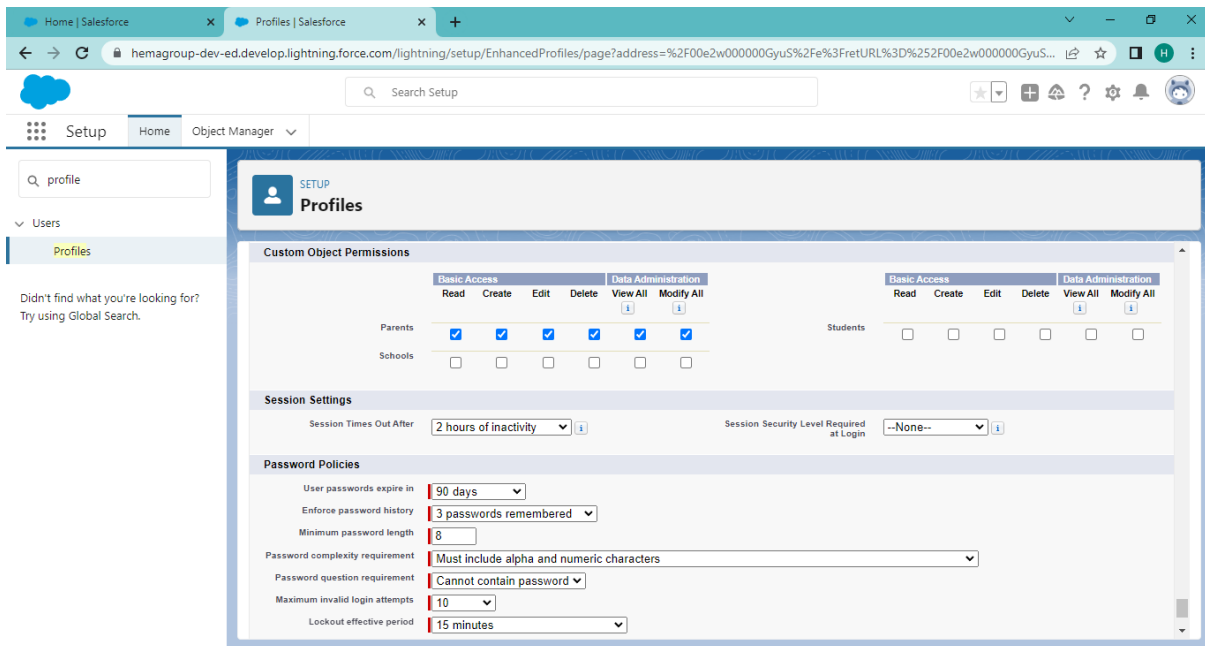
1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter School profile
4. Click Save.



5. While still on the School profile page, then click Edit.



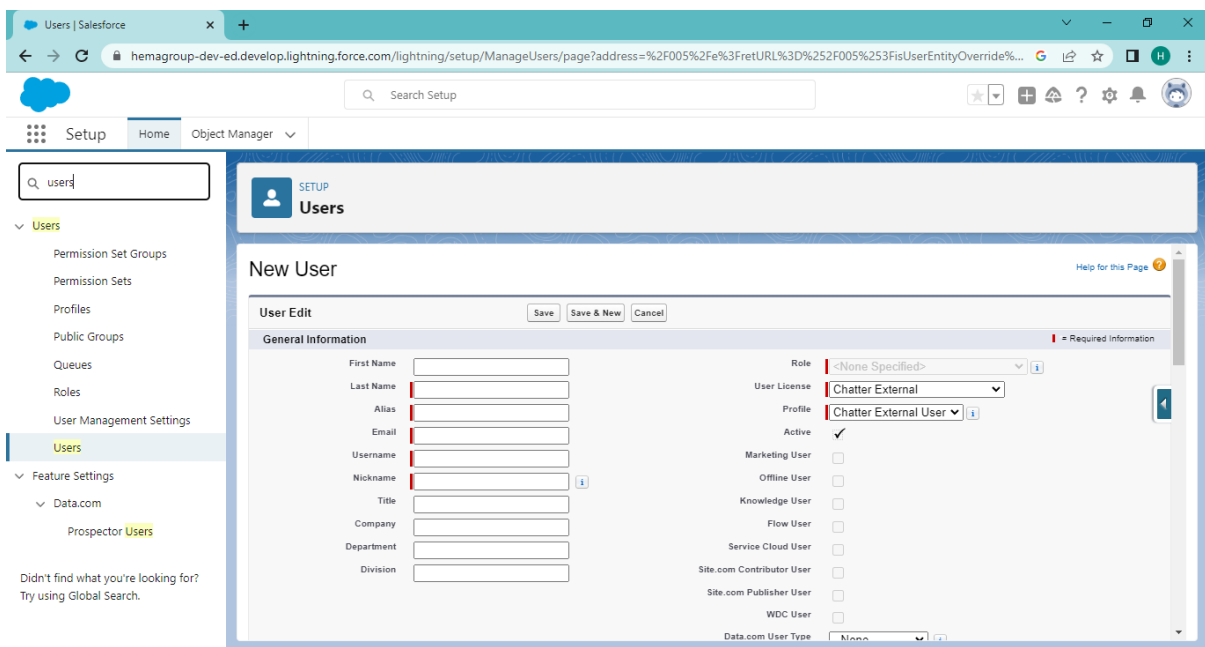
6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile.



## Milestone-6: Users

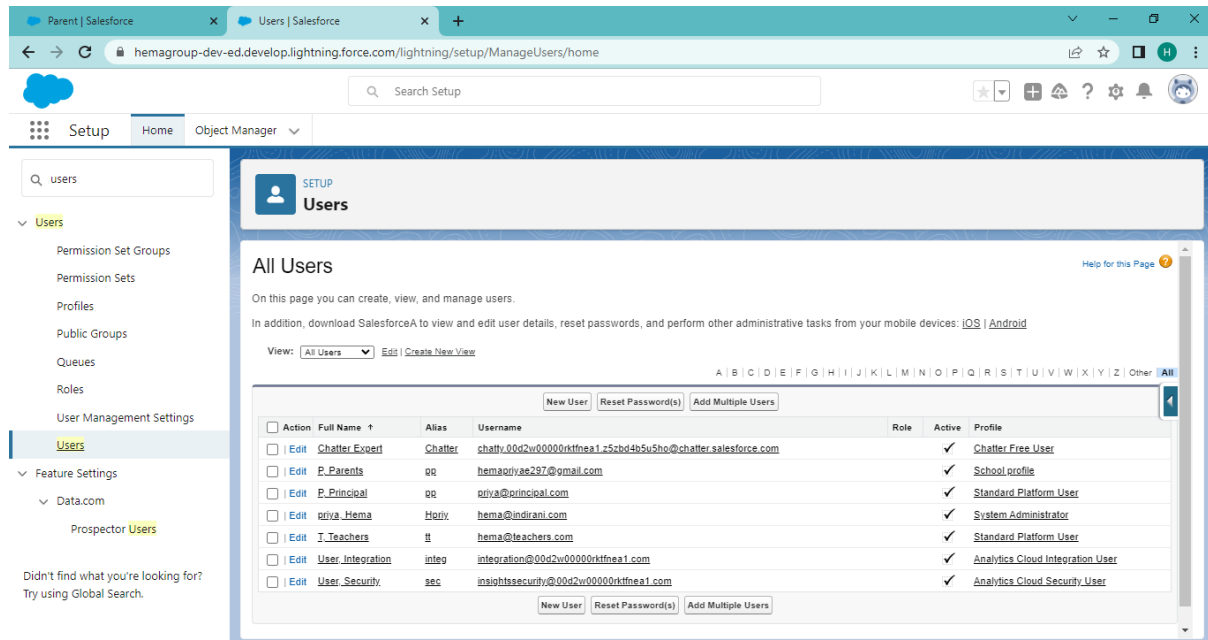
### Activity: Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.



3. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.

4. Select a User License As salesforce.
5. Select a profile as a School profile.
6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

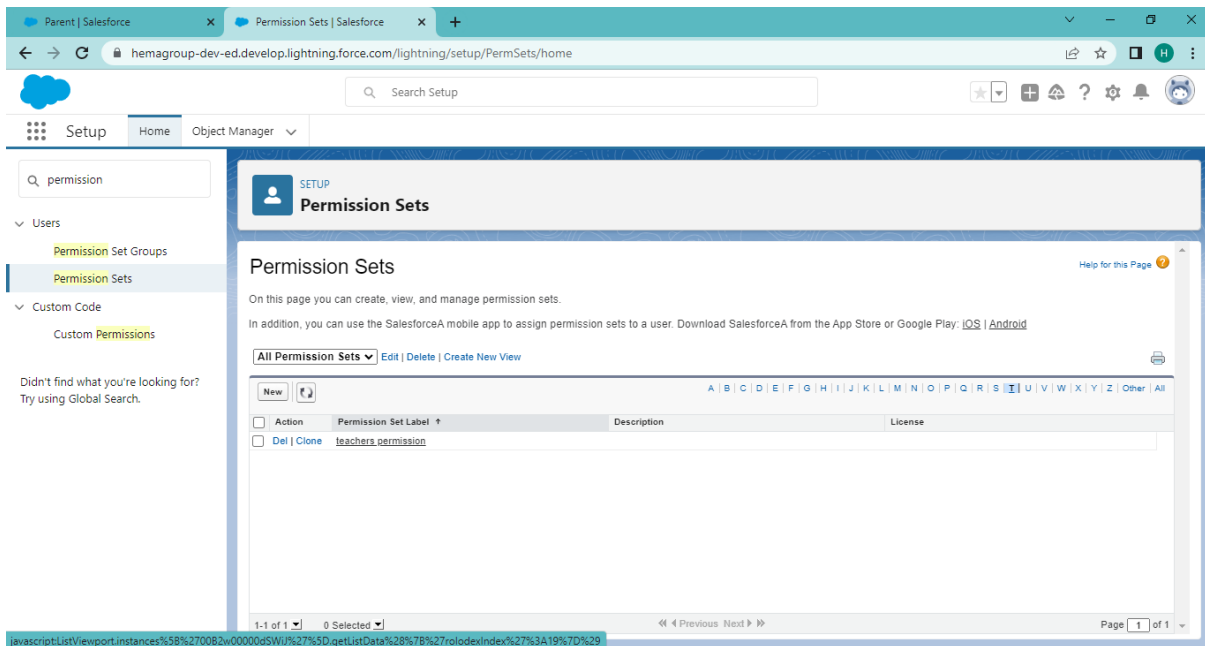


7. Similarly follow the above steps and create 3 users as Teachers and principals.

## Milestone-7:Permission sets

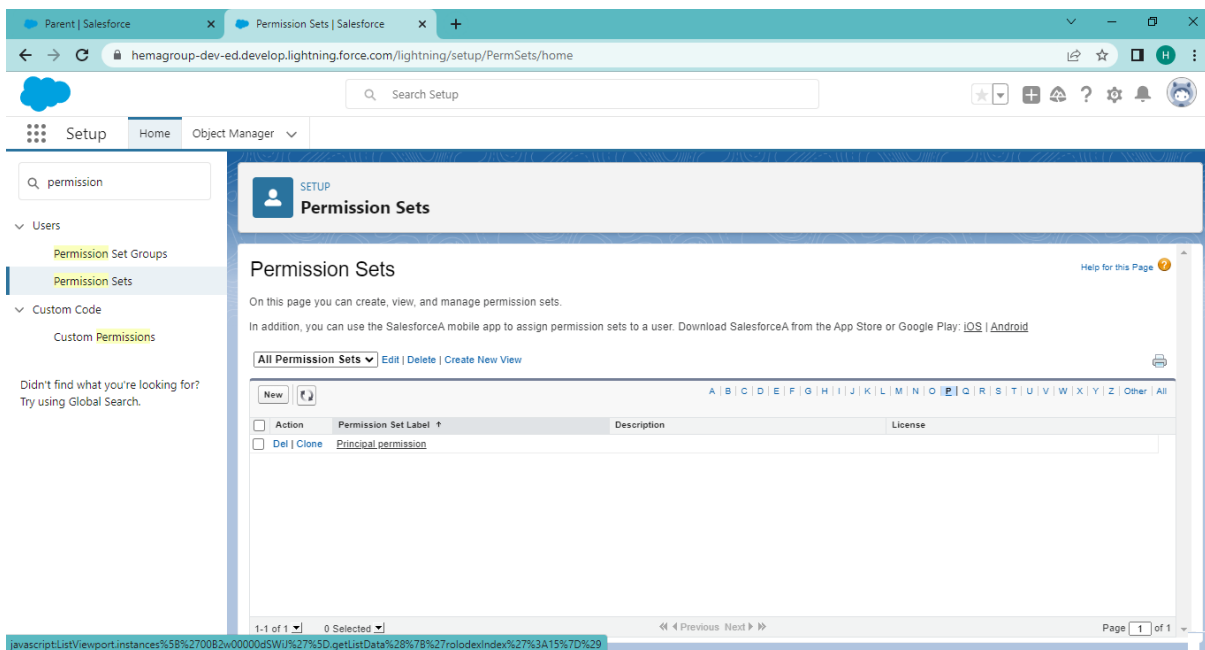
### Activity-1: Permission sets 1:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user Similarly follow the above steps for the permission set 2.



## Activity-2: Permission sets 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

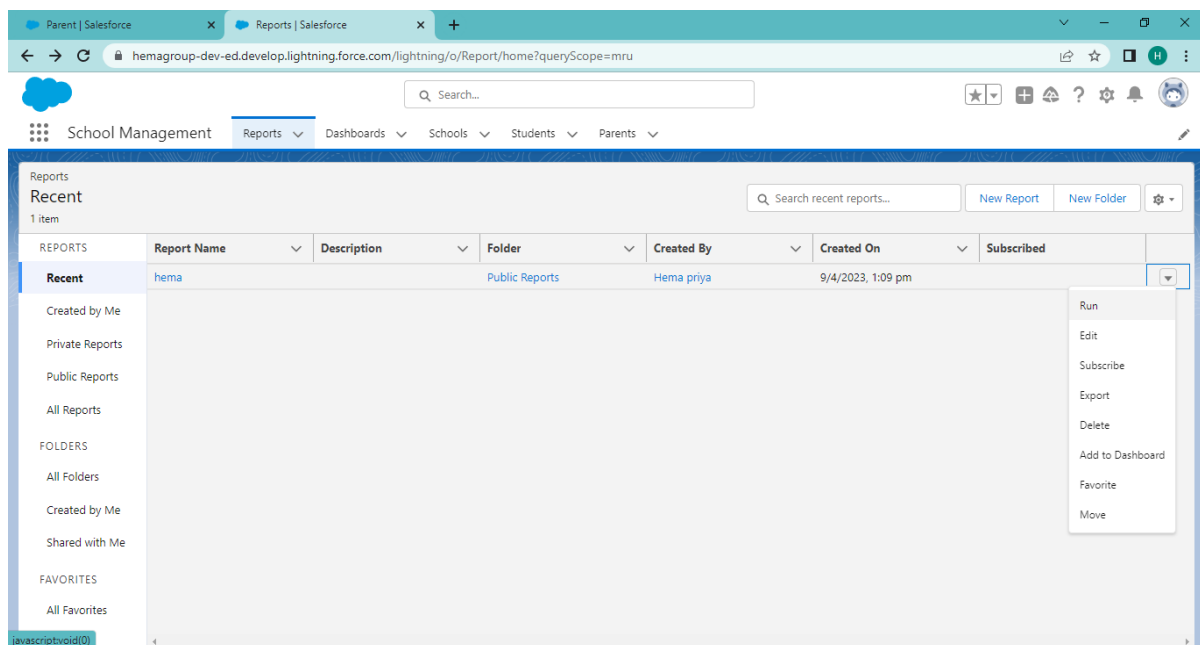


## Milestone-8:Reports

### Activity:

#### Reports :

1. From the Reports tab, click New Report.
2. Select the report type as School with students and parents for the report, and click Create.
3. Customize your report, then save or run it



## 4.Trailhead Profile Public URL

Team Lead: <https://trailblazer.me/id/hi934584>

Team Member 1- <https://trailblazer.me/id/amariyappan1>

Team Member 2- <https://trailblazer.me/id/aanusuva1>

Team Member 3- <https://trailblazer.me/id/saran61>

## **5. ADVANTAGES:**

Having huge amounts of data on **customer interactions** enables an organisation to build up a clearer picture of its customers. It allows for deep insights to identify what the company is doing right as well as where it's weak when it comes to managing its customers. With a CRM system, the most profitable customers can be identified, with the view to more time being spent targeting them. The CRM software also lets a business tailor its marketing communications to achieve more effective results and, hence, a greater return on investment in sales and marketing.

### **Speed up the sales conversion process.**

A CRM system integrated within a marketing campaign allows insights into the interests of prospective customers. Once the client enters the sales funnel, qualification and conversion can be full or partly automated making it much faster. This, whilst enhancing the sales experience, also frees up the sales team's time, enabling them to focus on closing high probability and/or high-value deals.

### **Increases staff productivity, lowers time costs and boosts morale.**

Quaint as it may seem, paperwork is still a significant part of many businesses' day-to-day operations. A lot of that paperwork could be eliminated with a CRM system. Cutting down on wasted time increases the ability of the employee to get on with the kind of work that brings real value to the organisation. Slashing busy-work means that profit per employee rises, all the while increasing morale as staff feels that their work is more essential and rewarding. All of this fits neatly in with the kind of lean management practices that high-performing businesses utilize.

### **Enables widely dispersed teams to work closely.**

Companies often have parts of their operations away from their home base for a multitude of reasons—cheaper operating costs, proximity to clients, or greater ease in providing on-site technical support. A remotely accessible CRM software allows a company to exploit the efficiencies and benefits of multiple geographical locations. This is a huge advantage for sales teams in the field as it gives them the facility to spend more time with prospects and clients. Most importantly though, an organisation fully integrated by means of a CRM system can respond far more effectively to customer queries and issues.

## **Improve customer loyalty through exceptional experience**

The hallmark of excellent **customer service** is being able to intelligently and quickly address queries and problems. This can only be achieved by being able to efficiently access customers' data and transactional history allowing for instant familiarization with their context and needs. A CRM system helps speed up processes, enabling employees to deal with more queries and providing a generally better customer experience. An investment in a CRM system is an investment in customer loyalty and the return on that investment comes in the form of an increase in customers' lifetime value and word-of-mouth referrals.

### **Salesforce Pros**

- It speeds up the sales conversion process.
- It increases staff productivity, lowering time-cost.
- It allows geographically dispersed teams to collaborate effectively.



## **DISADVANTGES:**

### **Staff over-reliance on CRM may diminish customer loyalty through a bad experience.**

If staff come to rely too heavily on **CRM software**, it reduces their flexibility in dealing with customer queries. They often become helpless in the face of questions from clients where the information isn't on the system and which requires lateral thinking to solve the problem. This has obvious implications for the customer experience and clients may become frustrated, taking their business to a competitor.

### **Security concerns associated with centralised data.**

There are risks associated with keeping a lot of data in one place. With stringent regulations surrounding data (GDPR, for example), businesses face severe penalties in the event of security breaches. When it comes to CRM software, it is vital that security processes are put in place to protect clients' personal information. This can be a significant expense for a business, but the costs associated with not having such safeguards in place are far higher.

### **The excess initial time and productivity cost of implementation**

There will be a steep learning curve for staff with any new system. It will take some time for employees to find their feet with the CRM system and mistakes will be made. It's for the management team to ensure that there's adequate buy-in and support in the process of transitioning. This can be expensive as it distracts manpower from their core tasks. The benefits when the CRM system *is* in place, however, will far outweigh the initial time and productivity costs.

### **It requires a process-driven sales organisation.**

To maximize the return on investment (ROI) in a CRM system, it is necessary to have a process-driven sales regime. A CRM can be used simply as a data store that can be mined for insights, assuming that that data is updated consistently. However, the real value comes from using it to manage the sales pipeline, flagging issues early and holding people to account. This reduces lost deals, increases upsell rates and provides much-improved revenue forecasting. Where no formal sales process exists, introducing one can be a massive change for some companies—one which may require extensive investment in people, retraining, a whole philosophical shift in the business' sales approach and quite a lot of short-term expense and pain.

### **It may not suit every business.**

Certain businesses where customer transactions are highly standardised may not benefit from a CRM system. A CRM system works best where personalisation is required in client/company interactions and where there are multiple touch-points over time between the client and the business across departments. For example, a CRM system wouldn't do McDonald's much good, but for something like an insurance brokerage, a CRM system is essential. Marketing teams are able to contact the client with tailored offers; communications are personalised; multiple employees are able to work on customers' queries. Before choosing a CRM software, whether custom or off-the-shelf, a business needs to ask itself, not only what its objectives and requirements are, but actually if it could really benefit from one at all.

At the same time, there are various **CRM solutions** in the market such as **Zoho**, **Vtiger**, **CloudYogi**, **Zendesk**, **Pipedrive** etc. If you work with a technology consultant, such as ourselves, we can help you to assess which solution would be most fitting for your business model & unique requirements. Taking all the benefits and costs to a company of **implementing a CRM** into account, the pros outweigh the cons. Of course, there are going short-term disadvantages. The strategic advantages, however, of CRM in creating the kind of financial and time efficiencies that

allow a business to greatly increase the speed and effectiveness in managing are simply too numerous to ignore.

### **Salesforce Cons**

- Security and data protection issues with centralised data.
- The excess initial time and productivity cost at the implementation.
- Requires a process-driven sales organisation.

## **6. APPLICATION**

CRM (Customer Relationship Management) higher education technology enables institutions to manage relationships with all of their customers (including students, alumni, faculty, staff, and corporate partners) and connect insights from those interactions in a unified view. According to Fortune Business Insights, the global CRM market is expected to reach \$145.79 billion by 2029, growing at a CAGR of 12.5%. Companies of all sizes are struggling to stay in step with their customers as their preferences related to how they learn about products and when they buy change constantly. At least it has in the world of customer relationship management or CRM software, one of the fastest growing categories of enterprise software. We are entering the era of intelligent, integrated CRM, and the future of CRM is even brighter. From small businesses to global enterprises, sales and marketing teams are adopting CRM to deliver better customer experiences, acquire and retain customers, and gain new customer-centric insights that are changing their companies for the better.

## **7. CONCLUSION**

Today, many higher education institutions are managing the student journey with outdated and siloed systems. Increasingly, students are expecting seamless technology experiences, personalized communications, and a clear ROI. Yet, the average university has [35 different applications or systems](#) to manage recruiting, enrollment, engagement, job

placement, and alumni and donor engagement. Nearly one-fifth of institutions have 70 or more! This lack of connectivity causes challenges in data-driven decision-making across the student lifecycle. When data exists in silos, the student experience can often feel disconnected and impersonal. CRM, however, is an integrated platform connecting insights across recruitment & admissions, student experience, advancement and marketing into a single pane of glass. This enables institutions to collaborate more effectively and support more students at scale. Stronger student relationships are built on the foundation of connected student data. The right technology can help institutions maximize every student's potential—from the moment they express interest in an institution to the day they graduate and become alumni. By creating a 360-degree view of every student, a CRM platform empowers institutions to turn data into insights and insights into actions. These connected insights make it possible to shape proactive and personalized interactions with students, ultimately putting student relationships at the center of every institution.

## **8.FUTURE SCOPE**

Customer satisfaction has replaced customer experience as the top sales metric. To meet customer-centric goals, CRM systems need to evolve with greater precision and predictive analytics, as well as a focus on customer needs and behavior. As AI becomes more prominent in the sales space, sales reps will transition to more customer-care-focused tasks. CRM solutions act as a single source of truth for organizations looking to unify operations across departments. Organizations seek to automate rudimentary, day-to-day functions to allow staff to focus on more pressing tasks. As customers increasingly demand hyper-personalized experiences, CRMs are adapting to deliver mass personalization at scale.