

PROJECT REPORT TEMPLATE

A CRM Application for Schools and Colleges

1. Introduction

Overview

- (i) School Management is the process of creating and maintaining an school.
- (ii) This process spans from the very beginning of planning all the way to post – event strategizing.
- (iii) At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.
- (iv) During the event, event managers oversee the event live and make sure things run smoothly.
- (v) After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying and the ball for any post-event offerings.
- (vi) All different branches of planning go into event management, including various types of sourcing, designing, regulation, checks, and on-site management.
- (vii) In event management, you could be in the process of creating a conference, a product, launch, an internal sales kick-off, or even a wedding.
- (viii) Really, any event that requires considerable planning and execution is event management.

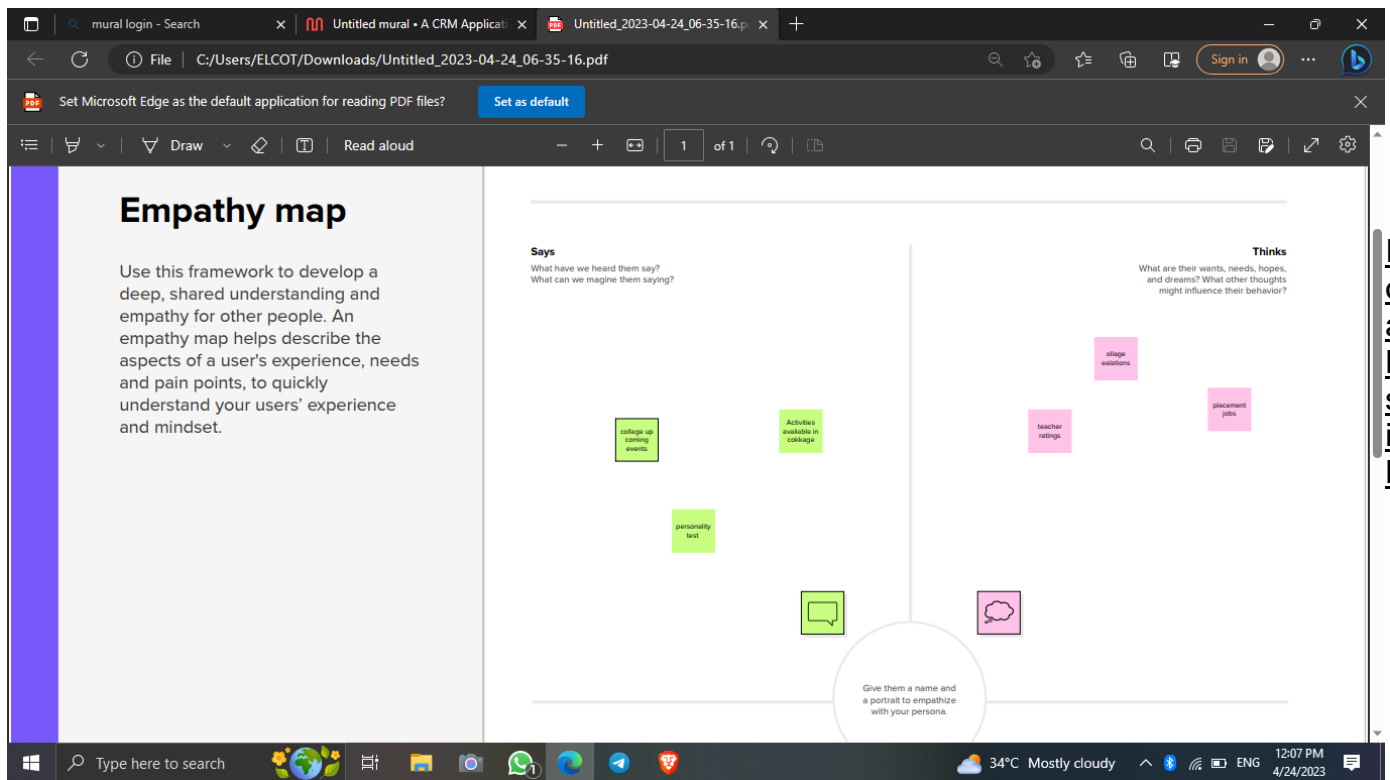
Purpose

- (i) Purpose to manage events throughout their lifecycle is the purpose of school management.
- (ii) This lifecycle of activities to detect events, make sense of them and determine the appropriate control action, which is coordinated by the event management process.
- (iii) Promotion of new products or services.
- (iv) Achieving the desired exposure and brand awareness.
- (v) Attracting more prospects and clients from exhibitions and trade shows.
- (vi) Improving brand positioning through professional events and conferences.
- (vii) Creative solutions to drive the highest level of satisfaction from the guests.
- (viii) Handling all permissions, permits, insurance and security concerns.
- (ix) Saving valuable time, efforts and money when hiring experience event managers.

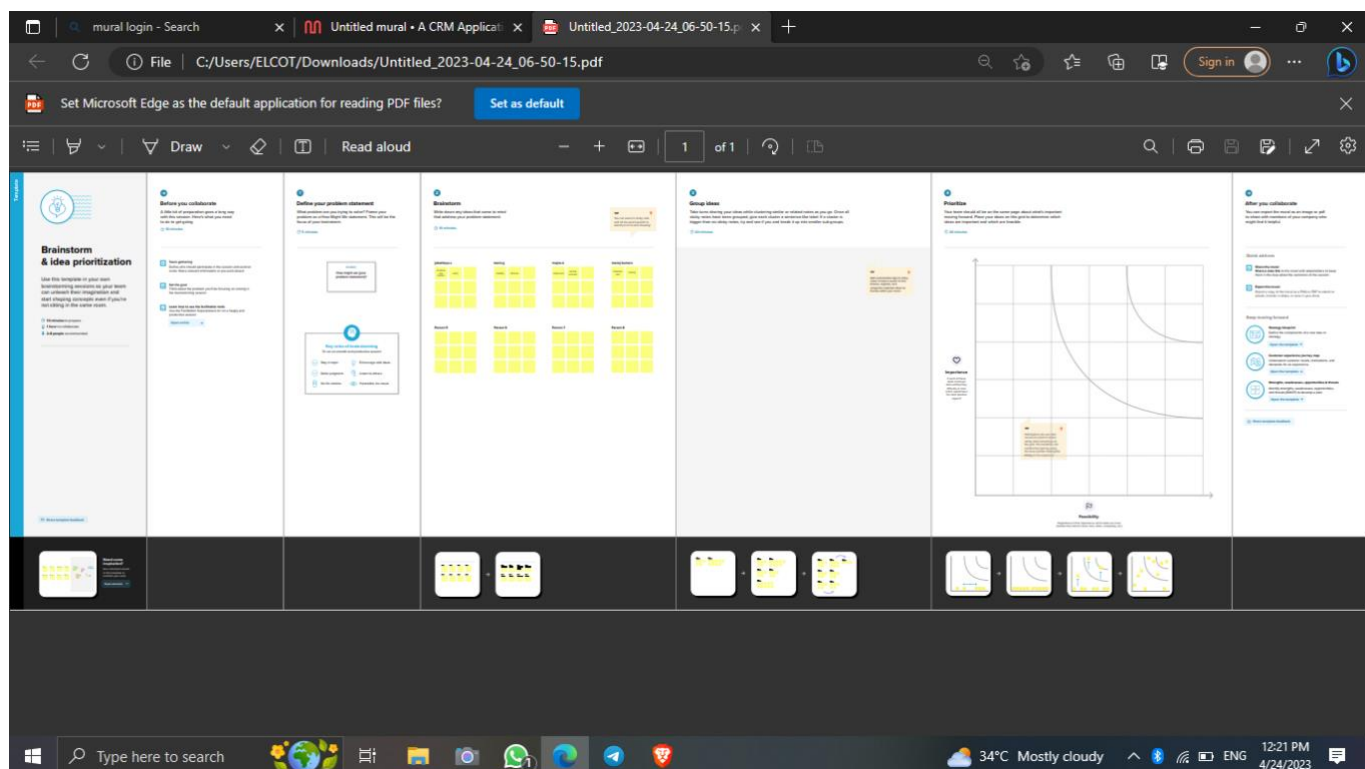
- (x) Reducing the possibility of any incidents that harm the professional atmosphere.

2. Problem Definition & Design Thinking

Empathy Map



Ideation
and
Brain
storming
Map



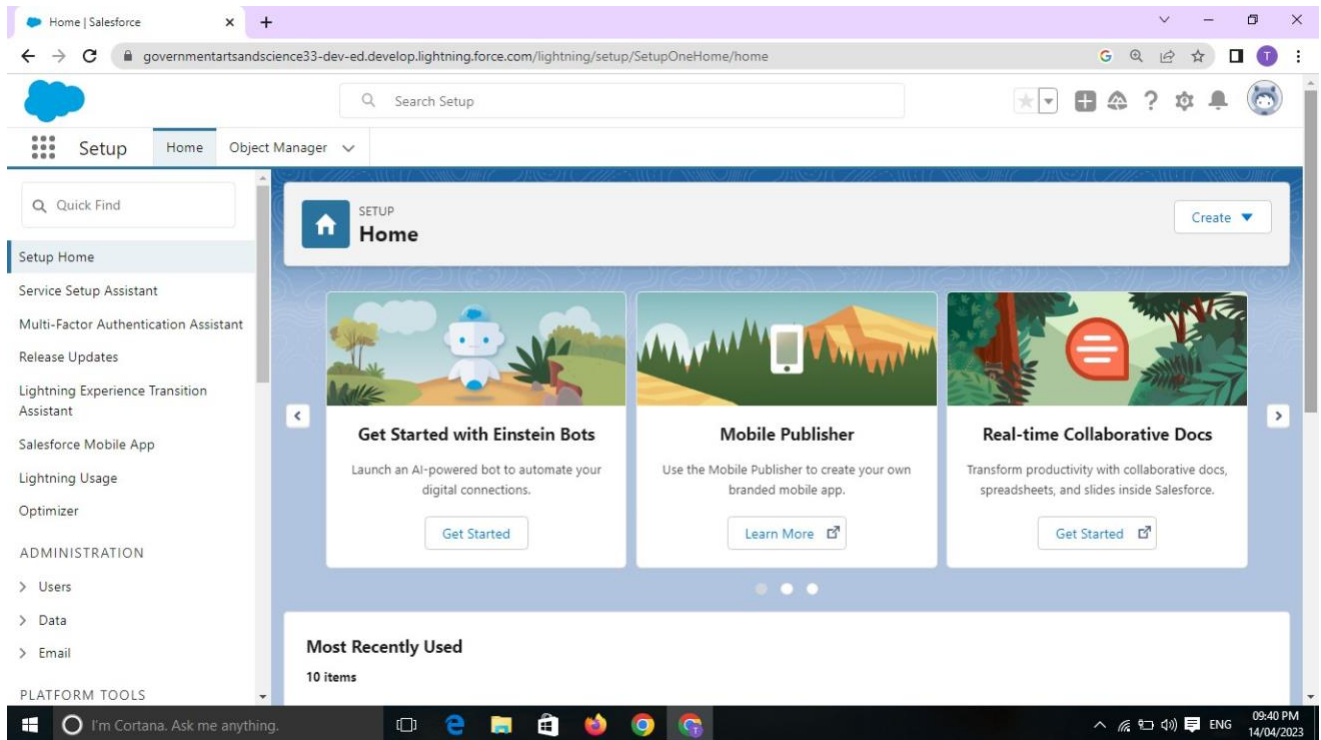
3.Result

Data Model

<u>Object Name</u>	<u>Fields in the object</u>	
<u>School</u>	Field label	Data type
	Address	Text Area
	Highest Marks	Roll - Up summary
	Number of students	Roll - Up summary
	Phone number	Phone
<u>Students</u>	Field label	Data type
	Class	Number
	Results	Picklist
	School	Master-Details
<u>Parents</u>	Field label	Data type
	Parent Address	Text Area
	Parent Number	Phone
	Parent Name	Text

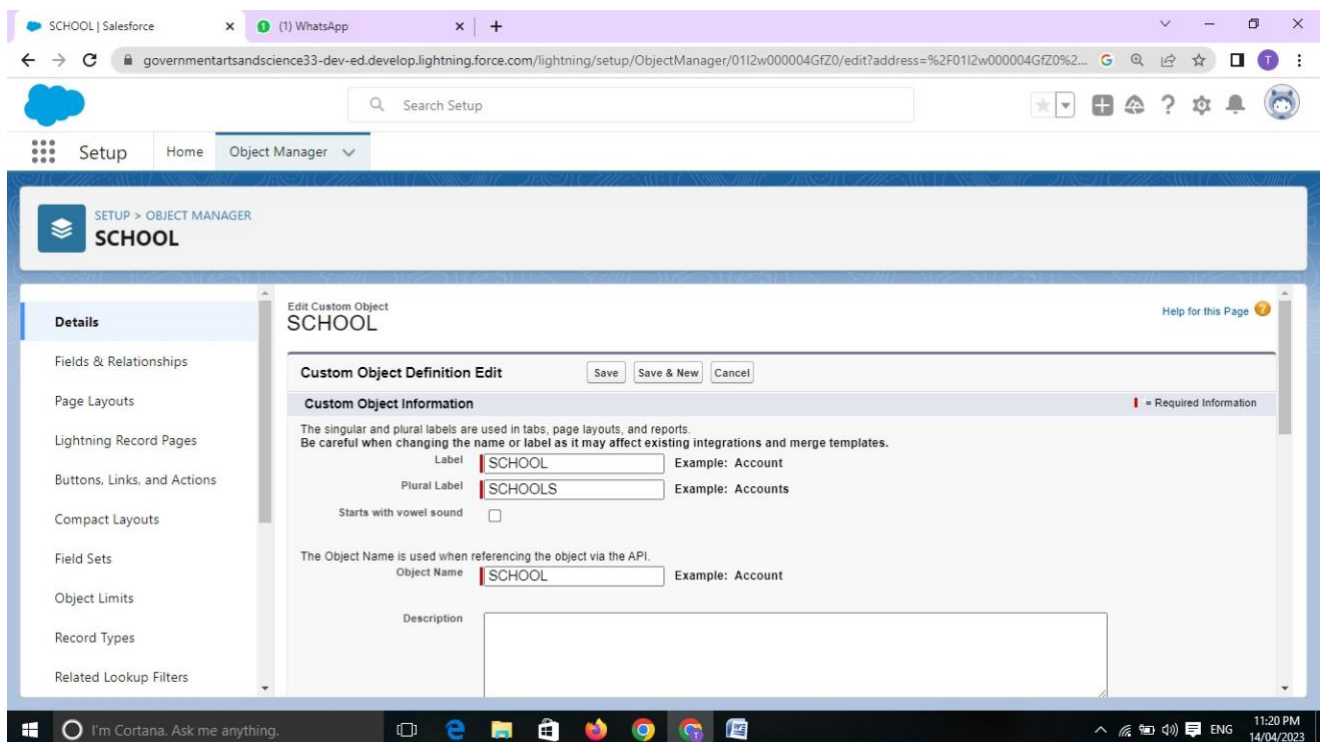
Activity and Screenshot

Milestone -1: Salesforce

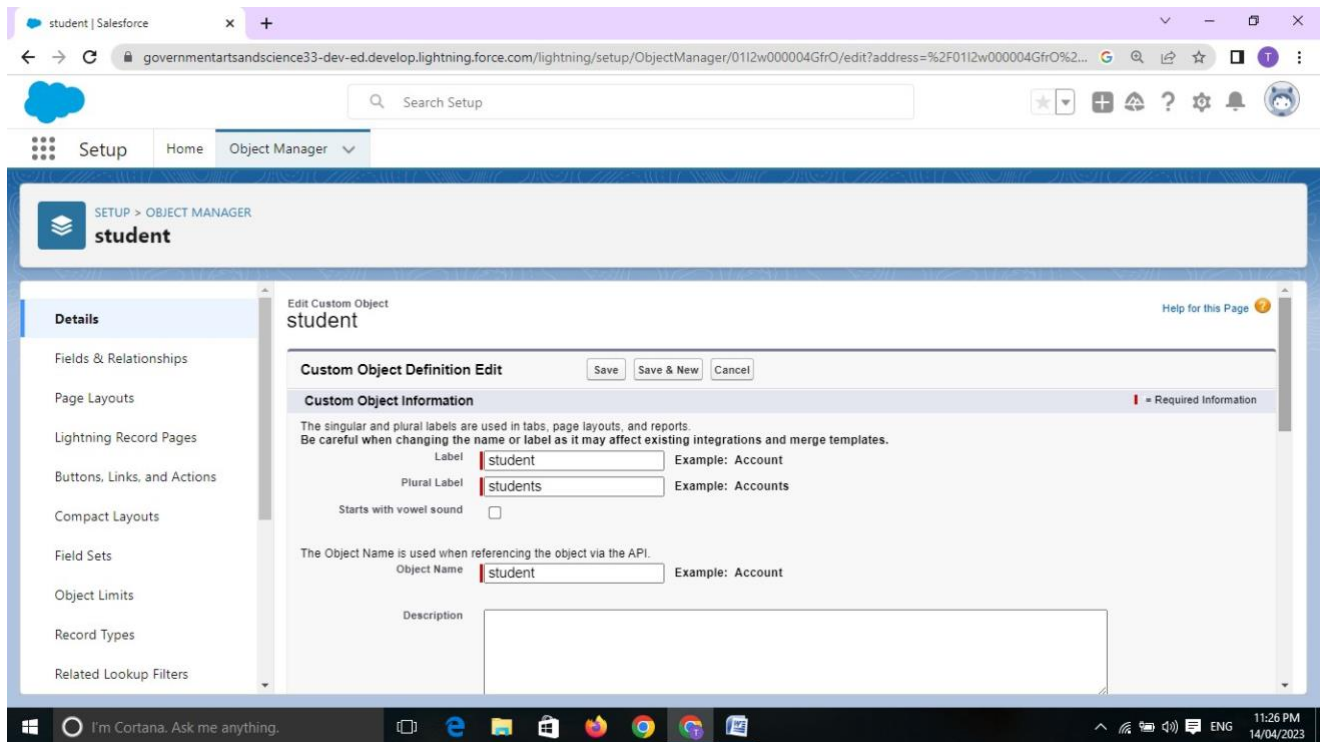


Milestone-2: Object

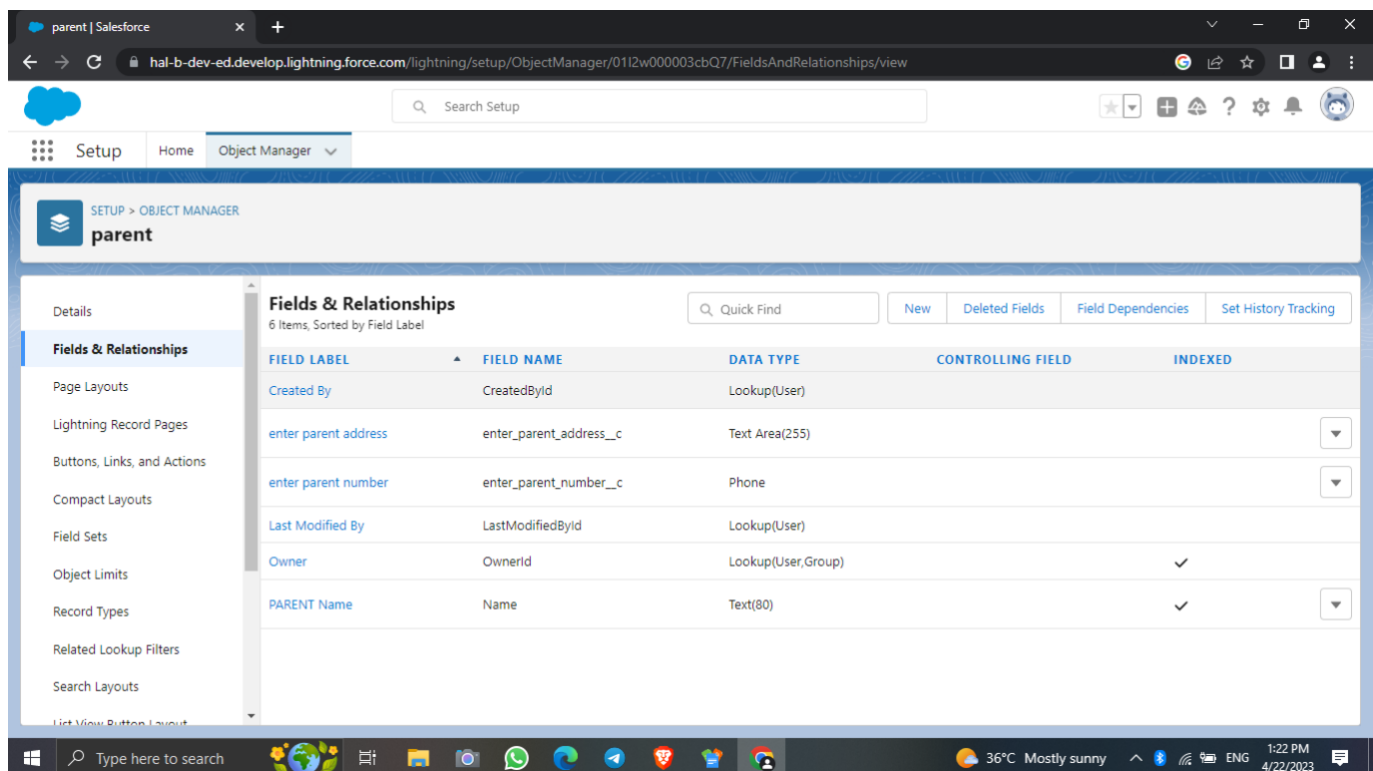
Activity -1: Creation of School Object:



Activity – 2: Creation of Student Object:



Activity -3: Creation of Parent Object:



The screenshot shows the Salesforce Setup interface for the 'parent' object in the Object Manager. The 'Fields & Relationships' section is active, displaying a list of 6 items sorted by Field Label. The table below shows the details of these fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
enter parent address	enter_parent_address__c	Text Area(255)		
enter parent number	enter_parent_number__c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
PARENT Name	Name	Text(80)		✓

Milestone-3: Lightning App

The screenshot shows the Salesforce App Manager interface for the Lightning Experience. The 'Clone Apps(Beta)' section is active, displaying a list of 22 items sorted by App Name. The table below shows the details of these apps.

App Name	Developer Name	Description	Last Modified	Ap...	Vi...
1 All Tabs	AllTabSet		20/03/2023, 11:45 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	20/03/2023, 11:45 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	20/03/2023, 11:45 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	20/03/2023, 11:48 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	20/03/2023, 11:45 am	Classic	✓

Milestone -4 Fields and Relationships

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

school | Salesforce

hal-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cbPs/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
school

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
Created By	CreatedById	Lookup(User)		
ender address	ender_address__c	Text Area(255)		
highest marks	highest_marks__c	Roll-Up Summary (MAX students)		
Last Modified By	LastModifiedById	Lookup(User)		
number of students	number_of_students__c	Roll-Up Summary (MAX students)		
Owner	OwnerId	Lookup(User, Group)		✓
phone number	phone_number__c	Phone		
school Name	Name	Text(80)		✓

https://hal-b-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0112w000003cbPs/FieldsAndRelationships/view

Type here to search

35°C Haze 12:08 PM 4/22/2023

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

students | Salesforce

hal-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cbQ2/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
students

Details

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
Created By	CreatedById	Lookup(User)		
enter class	enter_class__c	Number(18, 0)		
enter results	enter_results__c	Picklist		
enter school	enter_school__c	Master-Detail(school)		✓
Last Modified By	LastModifiedById	Lookup(User)		
phone number	phone_number__c	Phone		
students Name	Name	Text(80)		✓

Type here to search

35°C Haze 12:07 PM 4/22/2023

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

parent | Salesforce

hal-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cbQ7/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
parent

Details

Fields & Relationships
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
enter parent address	enter_parent_address__c	Text Area(255)		
enter parent number	enter_parent_number__c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
PARENT Name	Name	Text(80)		✓

https://hal-b-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w000003cbQ7/FieldsAndRelationships/view

Type here to search

35°C Haze 12:07 PM 4/22/2023

Milestone -5: Profile

Activity : Creation on Profile :

Profiles | Salesforce

hal-b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

pr

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules Settings

SETUP
Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Clone	Work.com Only User	Work.com Only	
Edit Clone	System Administrator	Salesforce	
Edit Clone	Standard User	Salesforce	
Edit Clone	Standard Platform User	Salesforce Platform	
Edit Clone	Solution Manager	Salesforce	
Edit Clone	Silver Partner User	Silver Partner	
Edit Del ...	School profile	Salesforce	✓
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	
Edit Del ...	Read Only	Salesforce	✓
Edit Clone	Partner Community User	Partner Community	
Edit Clone	Partner Community Login User	Partner Community Login	

1-25 of 40 0 Selected

Page 1 of 2

Type here to search

35°C Haze 12:05 PM 4/22/2023

Milestone -6: Users

Activity : Creating a Users

Users | Salesforce

hal-b-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

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 View

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv.00d2w00000rppoea3.9vujiang8uoged@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	P. Samepath	SP	samepath.p@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	parent	pare	sathiyaprakash352@gmail.com		✓	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	school	scho	sampanmahadev05@gmail.com		✓	School profile
<input type="checkbox"/> Edit	students	stud	ravisiva792@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rppoea3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2w00000rppoea3.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

Milestone -7: Permission sets

Activity -1: Permission sets 1:

Download file | iLovePDF

Home | Salesforce

hal-b-dev-ed.develop.my.salesforce.com/0PS?setupid=PermSets&retURL=%2Fui%2FSetup%2FSetup%3FSetupid%3DUsers

Permission Sets - Salesforce - D

Switch to Lightning Experience Sampath P Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards SCHOOL

It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.

Tell Me More Check Readiness

Quick Find / Search... Expand All Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started

Salesforce Mobile Quick Start

Home

Administer
Release Updates

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

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

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact ce...	Service Cloud Voice User

1-25 of 27 0 Selected Previous Next Page 1 of 2

Activity -2: Permission sets 2 :

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes 'Marketing', 'Home', 'Chatter', 'Campaigns', 'Leads', 'Contacts', 'Opportunities', 'Reports', 'Dashboards', and a dropdown menu with 'SCHOOL', 'PARENTS', and 'STUDENTS'. The main content area displays the 'Recently Viewed' list for 'SCHOOL', showing one item: 'government boys hr .sec school'. Below this, the 'All Permission Sets' table is visible, listing various permission sets and their descriptions.

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact ce...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact ce...	Service Cloud Voice User

Milestone -8: Reports

Activity -1: School Report

The screenshot shows the Salesforce Lightning Experience interface, similar to the first one. The top navigation bar includes 'Marketing', 'Home', 'Chatter', 'Campaigns', 'Leads', 'Contacts', 'Opportunities', 'Reports', 'Dashboards', and a dropdown menu with 'SCHOOL', 'PARENTS', and 'STUDENTS'. The main content area displays the 'Recently Viewed' list for 'SCHOOL', showing one item: 'government boys hr .sec school'.

Activity -2: Students Report :

The screenshot shows the Salesforce Reports interface. The left sidebar contains navigation links: Marketing, Home, Chatter, Campaigns, Leads, Contacts, Opportunities, Reports (selected), Dashboards, SCHOOL, PARENTS, and STUDENTS. The main content area is titled 'Reports' and 'Recent' with a search bar and buttons for 'New Report' and 'New Folder'. A table lists recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New SCHOOL with STUDENTS Report		Private Reports	Sampath P	12/4/2023, 1:03 pm	

Below the table, there are sections for 'FOLDERS' and 'FAVORITES', each with 'All' and 'Created by Me' options.

Activity -3: Parents Report :

The screenshot shows the Salesforce Parents page for a parent named 'paramasivam'. The page has tabs for 'Related' and 'Details'. The 'Details' tab is active, showing the following information:

Field	Value
PARENT Name	paramasivam
enter parent address	203,kattukottai, ganthi nagar, indili
enter parent number	9629309404
Created By	Sampath P, 22/04/2023, 11:34 am
Owner	Sampath P
Last Modified By	Sampath P, 22/04/2023, 11:34 am

The page also includes buttons for 'New Contact', 'Edit', and 'New Opportunity'.

4. Trailhead Profile Public URL :

Team Leader : jabatheyu .S

<https://trailblazer.me/id/jebatheyu>

Team Member :kevin . G

<https://trailblazer.me/id/keving>

anesan

Team Member :majnu .K

<https://trailblazer.me/id/mkanagaraj>

7

team member:manoj kumar .v

<https://trailblazer.me/id/mkumar28>

17

5. Advantages and Disadvantages

List of Advantages

- ✓ There are many advantages to using a school management system. Perhaps the most obvious benefit is that it can help to save time.
- ✓ A school management system can also help to improve efficiency. For example, if you need to track attendance, you can do this easily using a school management system
- ✓ The best part of SMS software is that you can quickly access the data you want in seconds. All data is at the fingertip of the administration.
- ✓ The student data can be arranged beautifully using such school management platforms.
- ✓ You can assign a unique id to each student, print their id cards, and monitor their grades & performance in exams.

List of Disadvantages

- ✓ CRM costs. one of the greatest challenges to CRM implementation is cost.
- ✓ Business culture. A lack of commitments or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.
- ✓ Poor communication.
- ✓ Lack of leadership.
- ✓ Good internet connectivity is another major issue that needs to be addressed.
- ✓ It is not actually a disadvantage of student management but instead is necessary for its optimal functioning.
- ✓ An easy to use interface not only increases the acceptance level of the software but also save time and money spent on training the stakeholders to use system.

6. APPLICATION

- ✓ Streamlined admissions and enrollment process.
- ✓ Efficient student management.
- ✓ Effective faculty management.
- ✓ Powerful reporting and analysis.
- ✓ Customizable and scalable solution.
- ✓ Seamless alumni management.

7. Conclusion

- ✓ Customer relationship management (CRM) can play a remarkable role in optimizing relation based operations in organizations. Successful implementation of CRM involves satisfying customers' needs which consequently results in building, managing and retaining effective and long-term relationships with the customers.
- ✓ In area of higher education, CRM can be utilized in order to build and manage relationships between educational institutions and their students who play the role as customers. As a part of higher educational area, Swedish universities can take advantage of CRM capabilities as well in building, managing and retaining long-term relationships with their students.

8. Future Scope

