

# A CRM APPLICATIONS FOR SCHOOLS/COLLEGES

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## **Submitted By**

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# Project Report Template

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## 1 INTRODUCTION

### 1.1 Overview

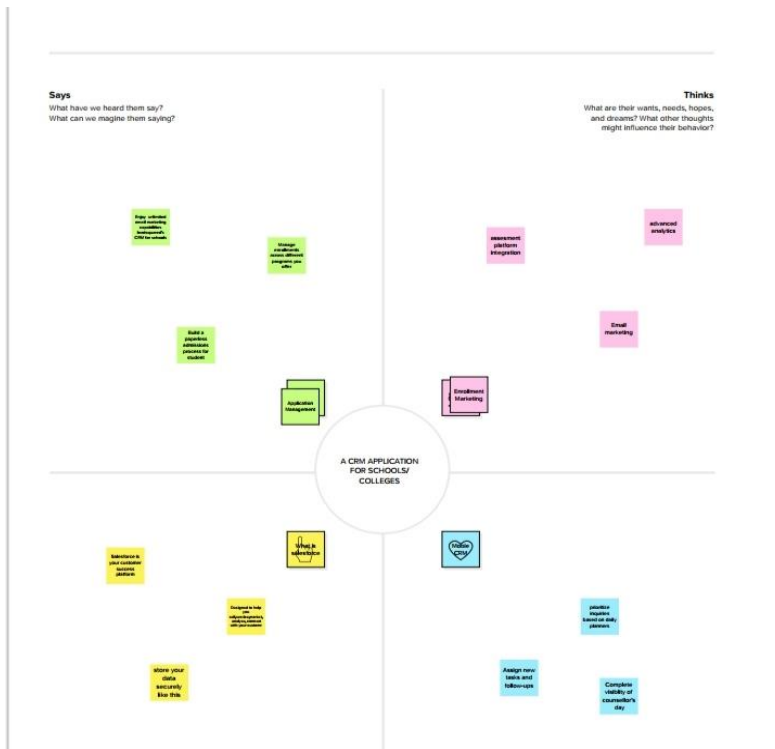
*A CRM is a customer-centric system that can help education professionals nurture relationships with prospects and enrollees, produce data-driven insights to illustrate progress towards goals, and streamline their admissions and marketing initiatives to save time and effort.*

### 1.2 Purpose

- *Improve Student Admissions Lifecycle. ...*
- *Track Student Life-Cycles Within the Institution. ...*
- *Keep Alumni Information Safe and Accessible. ...*
- *Stay Connected with Teams. ... ..*
- *Track and Gain Insight on Organization-Wide Data and Processes. ...*
- *Reduce Operational Costs*

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



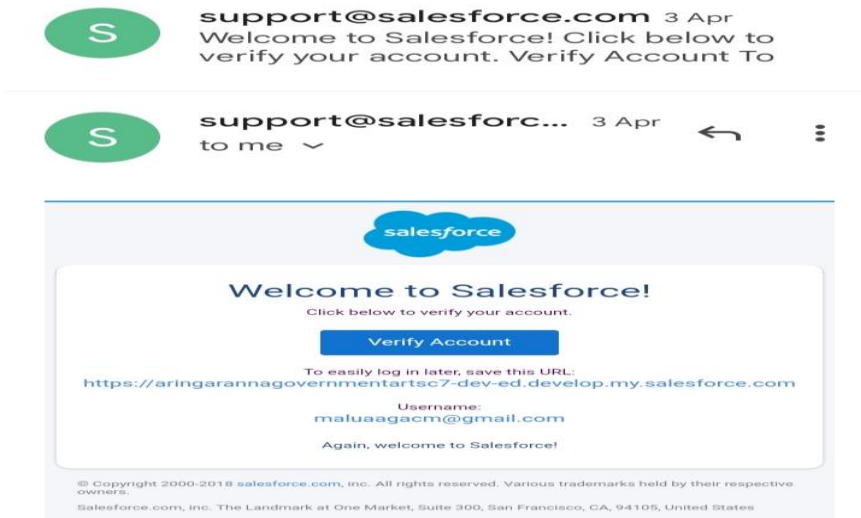
## 3 RESULT

### 3.1 Data Model:

Object name	Fields in the Object	
obj1		
	Field label	Data type
	School	Text Area
	Student	Picklist
Obj2		
	Field label	Data type
	Parent	Text Area
	Student	Master details relationship

### 3.2 Activity & Screenshot

#### Milestone 1



#### Milestone 2

##### Activity 1



## Activity 2

Setup > Object Manager

### Student

[Details](#) / [New](#) / [Setup](#) / [Object Manager](#)

Details

Fields & Relationships

Page Layout

Lightning Record Page

Buttons, Links, and Actions

Command Buttons

Field Sets

Object Links

Record Types

Related Lookup Search List View Button Layout Relationship Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Description

API Name

Custom

Singular Label

Plural Label

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Student\_c

Custom

Student

students

Standard Salesforce.com Help Window

Edit

Delete

## Activity 3

Home | Salesforce x New Custom Object | Salesforce x

arignarannagovernmentart114-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Gmail YouTube Maps Login | Salesforce

Search Setup

Setup Home Object Manager

### SETUP New Custom Object

New Custom Object [Help for this Page](#)

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

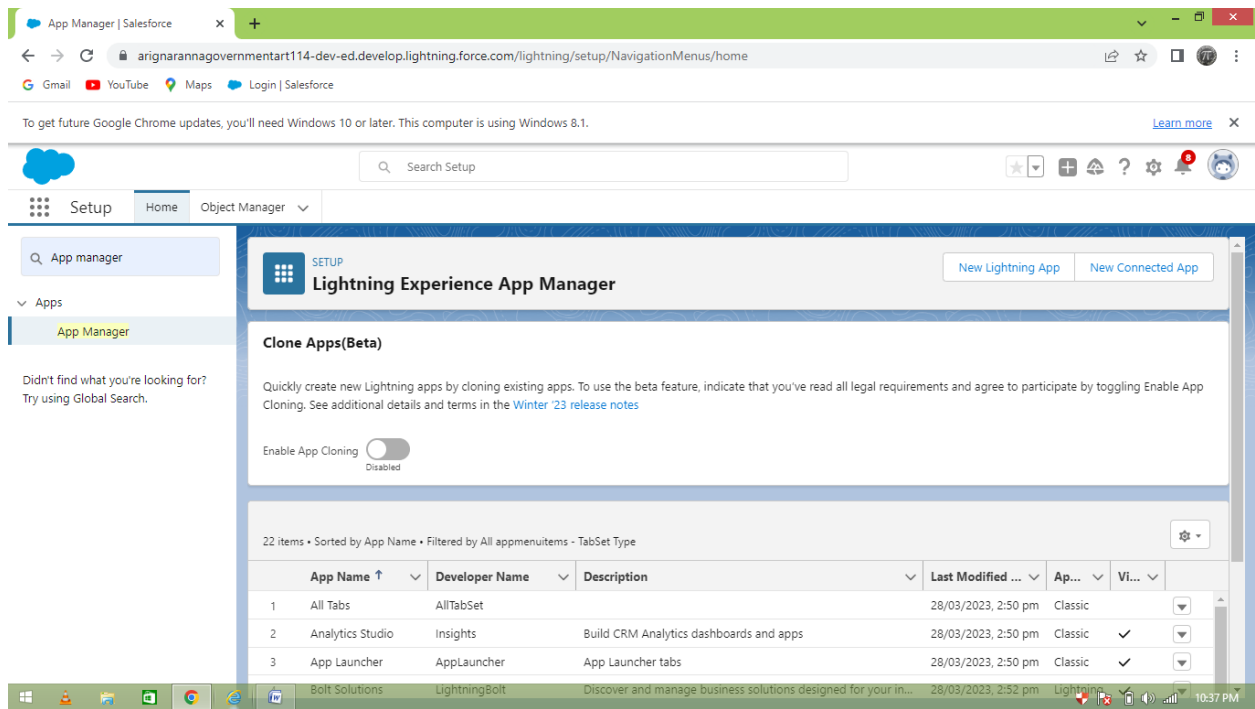
The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window

## Milestone 3 Activity



## Milestone 4

### Activity 1



## Activity 2

3/29/23, 1:58 AMNew Custom Object - Salesforce - Developer Edition

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Student

Example: Account

Plural Label

students

Example: Accounts

Starts with vowel sound☐

The Object Name is used when referencing the object via the API.

Object Name

Student

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window☐ Open a window using a Visualforce page

Content Name

None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Student Name

Example: Account Name

Data Type

Text

Optional Features

☒ Allow Reports☐ Allow Activities

### Activity 3

Home | SalesforceNew Custom Object | Salesforce

arignarannagovernmentart114-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

GmailYouTubeMapsLogin | Salesforce

Search Setup

SetupHomeObject Manager

SETUPNew Custom Object

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

parent

Example: Account

Plural Label

parents

Example: Accounts

Starts with vowel sound☐

The Object Name is used when referencing the object via the API.

Object Name

parent

Example: Account

Description

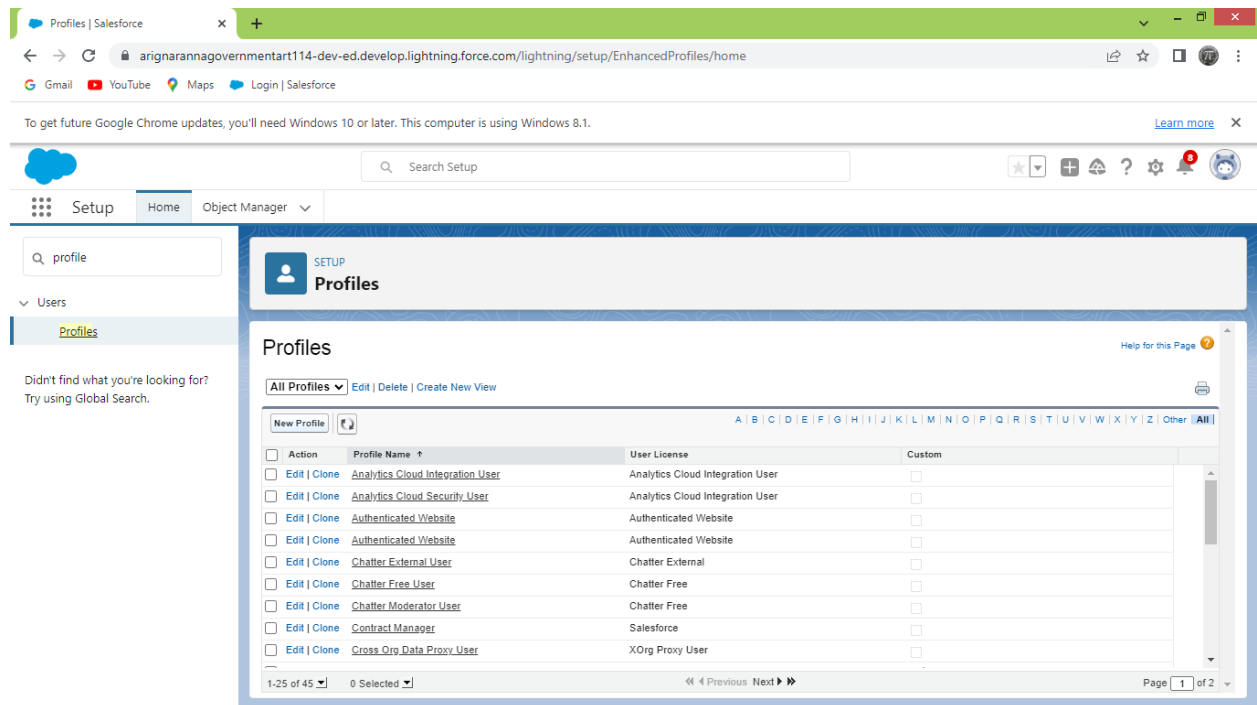
Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window☐ Open a window using a Visualforce page

### Milestone 5

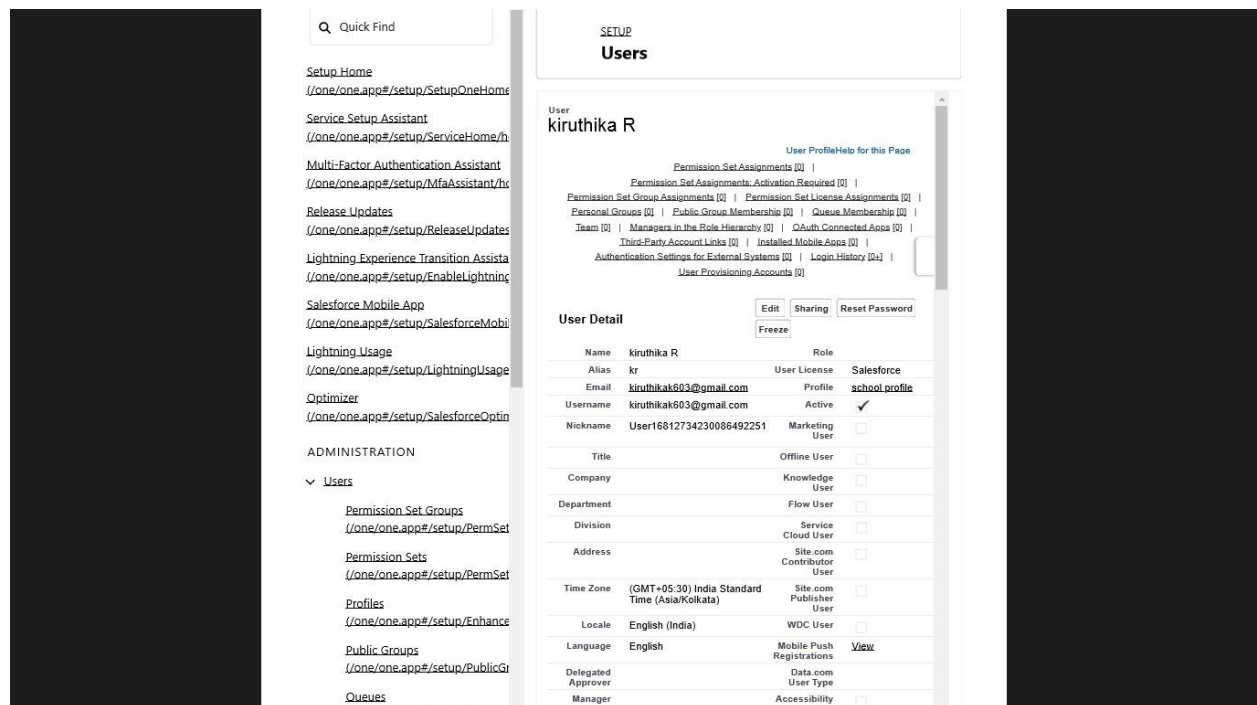
### Activity





## Milestone 6

### Activity



## Milestone 7

### Activity 1

Permission Sets | Salesforce

arignarannagovernmentart114-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Gmail YouTube Maps Login | Salesforce

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 8.1. [Learn more](#)

Search Setup

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

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

### SETUP Permission Sets

Permission Set Create [Help for this Page](#)

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

## Activity 2

4/11/23, 10:49 PM

Permission Sets | Salesforce

permission sets

Users

Permission Sets

[/one/one.app#/setup/PermSets/](#)

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

Principal

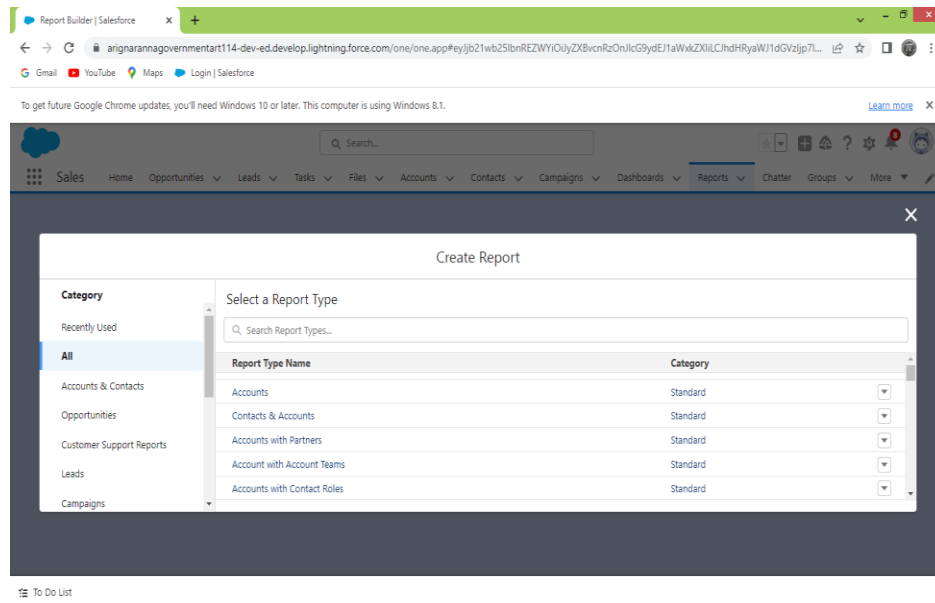
Current Assignments

Add Assignment

Full Name	Active	Role	Profile	User License
kinuthika R (/0052w00000...)	✓		school profile	Salesforce

## Milestone 8

### Activity



#### 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/kirur8>

Team Member 1 – <https://trailblazer.me/id/kowss11>

Team Member 2 – <https://trailblazer.me/id/loges20>

Team Member 3 – <https://trailblazer.me/id/mpoomalai>

## Project Report Template

#### 5 ADVANTAGES & DISADVANTAGE

### Advantages of CRM

**It allows for more effective sales and marketing.**

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.

**It can 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.

**It 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.

## **Disadvantages of CRM**

**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.

## ***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.

### 6 APPLICATIONS

### 7 CONCLUSION

#### **You can focus on quality leads**

If you've created a [strong enrollment strategy](#) by nurturing prospective leads with targeted events, email communications, a responsive website, and more, it's likely that you'll see an increase in admissions coming through your portal.

### 8 FUTURE SCOPE

# Benefits of CRM for Higher Education

Institutions can benefit from CRM higher education technology in a variety of ways:

- A unified view of constituent information
- \$2.4 million in total legacy cost savings
- An improved student experience
- Empowered faculty and staff
- The flexibility needed to pivot quickly

Let's take a look at each one in detail