

## **A CRM APPLICATION FOR SCHOOL AND COLLEGE**

### **1. INTRODUCTION:**

#### **1.1 Overview**

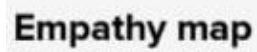
Administrator should be able to create all base data including semester Candidate course and lectures. Lecturers should have the ability to create internal results, dean, who is the one of the lecture, should be the only one with ability to updates internal results, re-evaluation can be initialized by candidate for all internal results. Now only dean can update the marks after re-evaluation .

#### **1.2 Purpose**

Single view of the customer for the cross functional insight and reporting.  
Dashboards that visually showcase data in action.

## **2 Problem Definition and Design Thinking**

### **2.1 Empathy map**



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## 2.2 Ideation and Brainstorming Map



### Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

🕒 10 minutes to prepare  
🕒 1 hour to collaborate  
👤 2-8 people recommended

[Share template feedback](#)

#### Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕒 10 minutes

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- Team gathering**  
Define who should participate in this session and send an invite. Share relevant information or pre-work ahead.
- Set the goal**  
Think about the problem you'll be focusing on solving in the brainstorming session.
- Learn how to use the facilitation tools**  
Use the Facilitation Superpowers to run a happy and productive session.

[Open with a...](#)

#### 1 Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

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🗨️

How might we (your problem statement)?

#### Key rules of brainstorming

Focus on smooth and productive sessions

🗨️ Stay on topic.	💡 Encourage wild ideas.
👂 Defer judgment.	👂 Listen to others.
🗨️ Go for volume.	👂 If possible, be visual.



#### Need some inspiration?

Get a fresh set of ideas and inspiration for your next session.

[Print examples](#)

2

## Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

### TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

**PONNANT S**  
Substance is a game-changing technology  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world

**JEYAPRIYA M**  
Substance is a game-changing technology  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world

**ANANTHI V**  
Substance is a game-changing technology  
It helps you to eat better and faster  
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Technology can be used to create a better world  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world

**SATHIYA M**  
Substance is a game-changing technology  
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It helps you to eat better and faster  
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Technology can be used to create a better world

**Person 6**

**Person 7**

**Person 8**

**Brainstorm & Idea Prioritization**  
Write down any ideas that come to mind that address your problem statement.  
10 minutes

**Person 1**  
Substance is a game-changing technology  
It helps you to eat better and faster  
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Technology can be used to create a better world  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world

**Person 2**  
Substance is a game-changing technology  
It helps you to eat better and faster  
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Technology can be used to create a better world  
It helps you to eat better and faster  
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**Person 3**  
Substance is a game-changing technology  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world

**Person 4**  
Substance is a game-changing technology  
It helps you to eat better and faster  
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Technology can be used to create a better world  
It helps you to eat better and faster  
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**Person 5**  
Substance is a game-changing technology  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
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**Person 6**  
Substance is a game-changing technology  
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With the help of this project they will gain knowledge  
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It helps you to eat better and faster  
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**Person 7**  
Substance is a game-changing technology  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
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It helps you to eat better and faster  
With the help of this project they will gain knowledge  
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**Person 8**  
Substance is a game-changing technology  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world  
It helps you to eat better and faster  
With the help of this project they will gain knowledge  
Technology can be used to create a better world

### 3.1

Object name.	Fields in the object	
	Field Names	Data types
CRM	CRM	Text 15
	Application	
	CRM	Text 9
CRM	School	
	CRM	Text15
	College	
	CRM	Text15
CRM	School	
	CRM	Text15
	College	
	CRM	Text15
College	classroom	
	CRM	Text15
	Building	
Application	CRM	Text15
	Application	
	CRM	Text15
Application	Classroom.	

### 3.2 Activity and screenshot

To create and object:

- Go to setup, click object manager .
- Select custom object.

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

CRM application

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

CRM\_application\_\_c

Custom

✓

Singular Label

CRM application

Plural Label

CRM applications

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

- Click now

- Click save

Similarly create field in custom object

Let's great custom object

To create field in custom field

- Go to setup click object manager
- Select custom object

Setup

Home

Object Manager

CRM mark

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

CRM mark

New Custom Field

Step 2 of 4

Step 2: Enter the details

Field LabelCRM application

Please enter the maximum length for a text field below.

Length15

Field NameCRM\_application

Description

Help Text

Required☐ Always require a value in this field in order to save a record

Unique☐ Do not allow duplicate values

- ☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
- ☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID☐ Set this field as the unique record identifier from an external system

Auto add to custom report type☒ Add this field to existing custom report types that contain this entity

Default Value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_rmdt.RecordAPIName.Field\_\_c

PreviousNextCancel

- Click new



- Click save
- Similarly create all field labels and field in driver object

#### **Create the custom management app**

- Create custom management app
- Create profile and user
- Create report and go to app launcher select custom management app
- Click new report

Accounts

Ananthi V ▾

New

Import

Printable View

12 items - Sorted by Account Name - Filtered by My accounts - Updated a few seconds ago

Search this list...

⚙

▢

↺

✎

⌵

	<input type="checkbox"/> Account Name ↑	Acc...	Billing Sta...	Phone	Type	Accou...	
1	<input type="checkbox"/> Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	AVelm	▾
2	<input type="checkbox"/> Dickenson plc		KS	(785) 241-6200	Customer - Channel	AVelm	▾
3	<input type="checkbox"/> Edge Communications		TX	(512) 757-6000	Customer - Direct	AVelm	▾
4	<input type="checkbox"/> Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	AVelm	▾
5	<input type="checkbox"/> GenePoint		CA	(650) 867-3450	Customer - Channel	AVelm	▾
6	<input type="checkbox"/> Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	AVelm	▾
7	<input type="checkbox"/> Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	AVelm	▾
8	<input type="checkbox"/> sForce		CA	(415) 901-7000		AVelm	▾
9	<input type="checkbox"/> United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	AVelm	▾
10	<input type="checkbox"/> United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	AVelm	▾
11	<input type="checkbox"/> United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	AVelm	▾
12	<input type="checkbox"/> University of Arizona		AZ	(520) 773-9050	Customer - Direct	AVelm	▾

**Create Account:**

**Submit required text details**



- Similarly create dashboard.

#### 4\_Trailhead profile public URL

Team lead : <http://trailblazer.me/id/avelmurugan2>

Team member 1: <http://trailblazer.me/id/sathm57>

Team member 2: <https://trailblazer.me/id/mj321>

Team member 3: <http://trailblazer.me/id/pponmani1>

#### Advantages:

- It allows for more effective sales and marketing
- It can speed up the sales conversion process.

#### Disadvantages:

- It may not suit every business
- Security concerns associate with centralised data.

#### Application:

- Align sales and marketing.
- Increase sales productivity.

#### Conclusion:

Customer relationship management is a business strategy that enables a business Organization to maximize revenue, customer satisfaction, profitability through strategic Mobilization, organization , and management of customers interests and desires.

#### 8.Future Scope:

Customer will become a company's best sales reps through superior products and services As well as customer-oriented messaging. The future of CRM is more than just the future of customer Relationship management software. It is really the future of business.

