

## **1.INTRODUCTION**

### **1.1 OVERVIEW**

**A CRM application for school management is a software tool designed specifically to help schools manage their administrative and operational process. It provides a centralized platform for storing and managing data related to students,parents,teachers,academic performance,financial transactions,and other important aspects of school management.**

#### **\* STUDENT INFORMATION MANAGERMENTS:**

**The CRM application can store and manage information related to students such as personal details,academic performance,attendance records,health information,etc. This helps school administrators to have a 360-degree view of each student,and allows them to make informed decisions about their education.**

#### **\*PARENT COMMUNICATIONS:**

**With a CRM application,schools can easily communicate with parents through email,SMS,or even automated notifications. This helps to keep them informed about their child's academic progress, school schedule, and more other important events or announcements.**

#### **\*ADMISSION AND ENROLLMENT MANAGEMENT:**

**When it comes to managing admissions and enrollment ,a CRM application can make the process smoother and more efficient. It can keep track of students applications, acceptance status, and waiting lists, and allow easy communication with prospective students and their families.**

#### **\*TEACHER MANAGERMENTS:**

**A CRM application can also manage teacher details, such as personal information, assignment details, and professional development. This allows the school to have a comprehensive view of each teacher, and helps in making decisions about staffing and curriculum.**

#### **\*REPORTING:**

**CRM applications can generate reports that provide insights into students performance,financial data, and other key areas of school management. This helps administrators to analyze and evaluate the effectiveness of their teaching and administrative staff, and make informed decisions for improvement.**

**Overall, CRM applications can provide a comprehensive solution for managing all aspects of school managements, increasing efficiency, improving communication, and enhancing students outcomes.**

### **1.2 PURPOSE:**

**The main purpose of a CRM application for a school is to manage and organize the relationship with its students, parents, teachers, and other stakeholders. This can**

include tracking communications with the parents and students, managing enrollment and admissions, scheduling appointments with teachers or counselors, tracking academic progress, and maintaining financial records. By using a CRM application, schools can streamline their administrative process, improve communication with stakeholders, track students data in real-time, and ultimately enhance the overall educational experience.

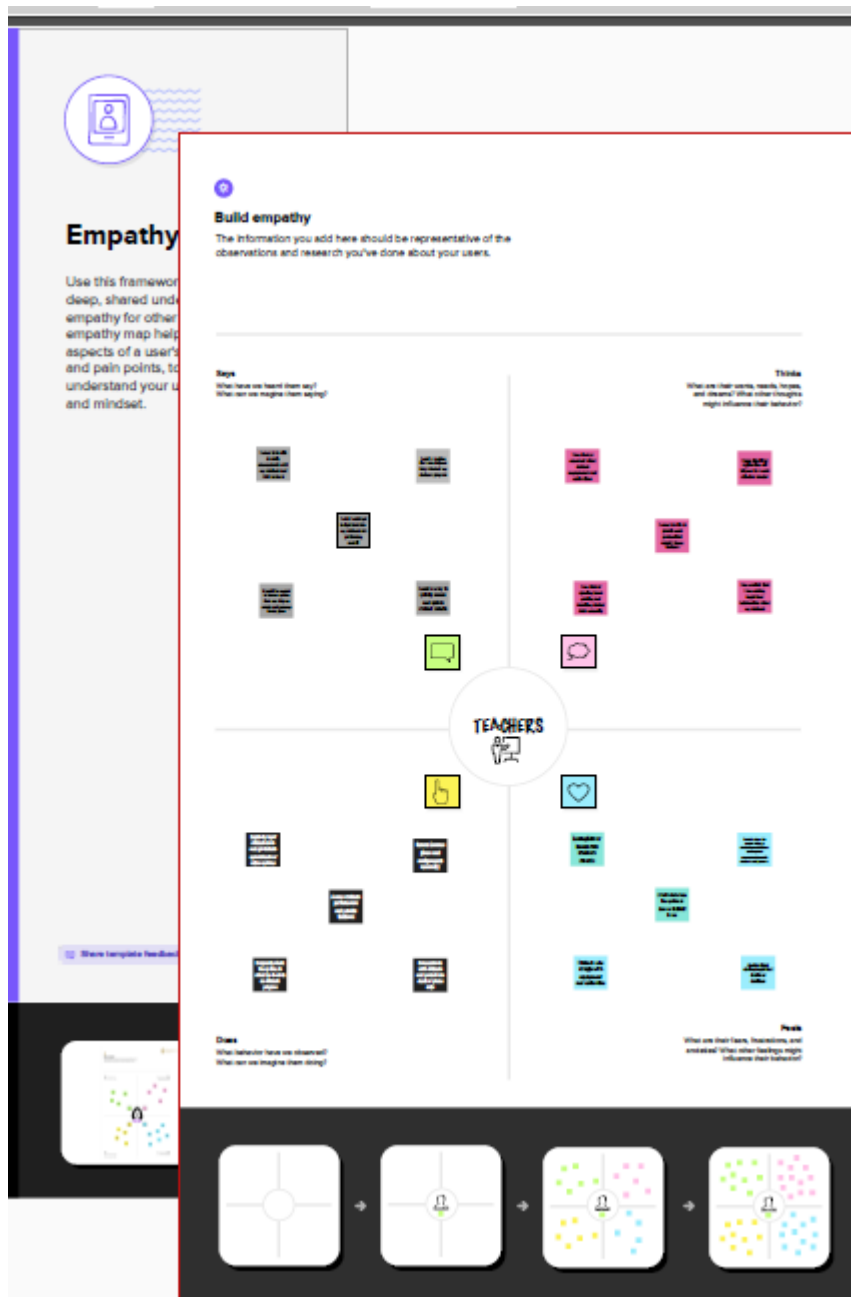
**EXAMPLES:**

- 1. IMPROVING ENROLLMENT AND ADMISSIONS PROCESS**
- 2. ENHANCING PARENT AND STUDENT COMMUNICATION**
- 3. TRACKING ACADEMIC PROGRESS**
- 4. MANAGING FINANCIAL INFORMATIONS**

Overall, a CRM application can provide schools with a wide range of benefits from their operations, enhance students outcomes, and build stronger relationships with parents and students.

## Problem Definition & Design Thinking

### 2.1. EMPATHY MAP



## 2.2. BRAINSTORM & IDEA PRIORITIZATION



### **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



## 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

**A**

### Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

**B**


### Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

**C**

### Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#) 

**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



### Key rules of brainstorming

To run a smooth and productive session



Stay in topic.



Encourage wild ideas.



Defer judgment.



Listen to others.



Go for volume.



If possible, be visual.

**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!

### NETHIYA.R

Creation of new or a new application for HR and HRM	Configuring system HRM for employee management	Integration of system HRM and HRM with the HRM
Developing system HRM and program testing with the HRM		

### TELMA TELSİYAT

Linking HRM to HRM and HRM	Configuring system HRM and HRM with the HRM	Testing system HRM and HRM with the HRM
Integrating HRM and HRM with the HRM		

### UMADEVIS

HRM for HRM and HRM	Testing system HRM and HRM with the HRM	Linking HRM and HRM with the HRM
Configuring system HRM and HRM with the HRM		

### BEAULAA

Configuring system HRM and HRM with the HRM	Testing system HRM and HRM with the HRM	Linking HRM and HRM with the HRM
Linking HRM and HRM with the HRM		

### VIKRAM.D

Testing system HRM and HRM with the HRM	Linking system HRM and HRM with the HRM	Configuring system HRM and HRM with the HRM
CRM for HRM and HRM		

### Person 6


### Person 7


### Person 8


3

## Group Ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

🕒 20 minutes

### TIP

Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.





4

## Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕒 20 minutes

		<p><b>High Impact, Low Feasibility</b></p> <p>These ideas are highly impactful but may be difficult to implement. Consider whether the benefits outweigh the costs and if there are ways to make them more feasible.</p>		<p><b>High Impact, High Feasibility</b></p> <p>These ideas are highly impactful and easy to implement. These are the most promising ideas and should be prioritized.</p>
<p><b>Low Impact, Low Feasibility</b></p> <p>These ideas are low impact and difficult to implement. Consider whether they are worth the effort.</p>				
	<p><b>Low Impact, High Feasibility</b></p> <p>These ideas are low impact but easy to implement. Consider whether they are worth the effort.</p>	<p><b>High Impact, Medium Feasibility</b></p> <p>These ideas are highly impactful and moderately easy to implement. Consider whether the benefits outweigh the costs.</p>		
	<p><b>Low Impact, Medium Feasibility</b></p> <p>These ideas are low impact and moderately easy to implement. Consider whether they are worth the effort.</p>		<p><b>High Impact, Low Feasibility</b></p> <p>These ideas are highly impactful but may be difficult to implement. Consider whether the benefits outweigh the costs.</p>	
<p><b>TIP</b></p> <p>Participants can use their cursors to point at where they want to place their ideas.</p>		<p><b>Low Impact, Low Feasibility</b></p> <p>These ideas are low impact and difficult to implement. Consider whether they are worth the effort.</p>	<p><b>High Impact, Medium Feasibility</b></p> <p>These ideas are highly impactful and moderately easy to implement. Consider whether the benefits outweigh the costs.</p>	

# Project Report Template



## After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

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### Quick add-ons



#### Share the mural

Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.



#### Export the mural

Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

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### Keep moving forward



#### Strategy blueprint

Define the components of a new idea or strategy.

[Open the template ->](#)



#### Customer experience journey map

Understand customer needs, motivations, and obstacles for an experience.

[Open the template ->](#)



#### Strengths, weaknesses, opportunities & threats

Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.

[Open the template ->](#)



[Share template feedback](#)

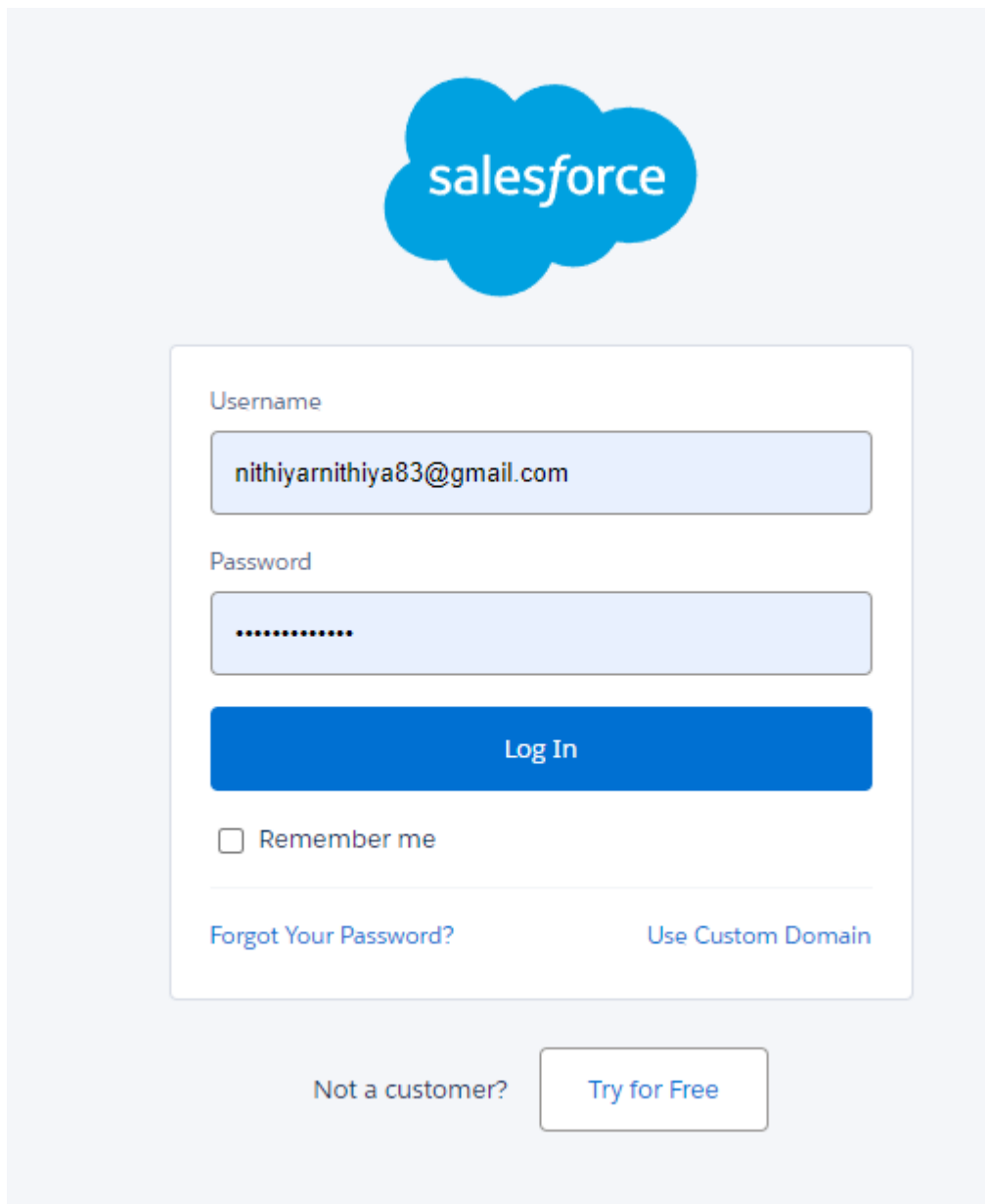
## 2.RESULT

### 1.1 Data Model:

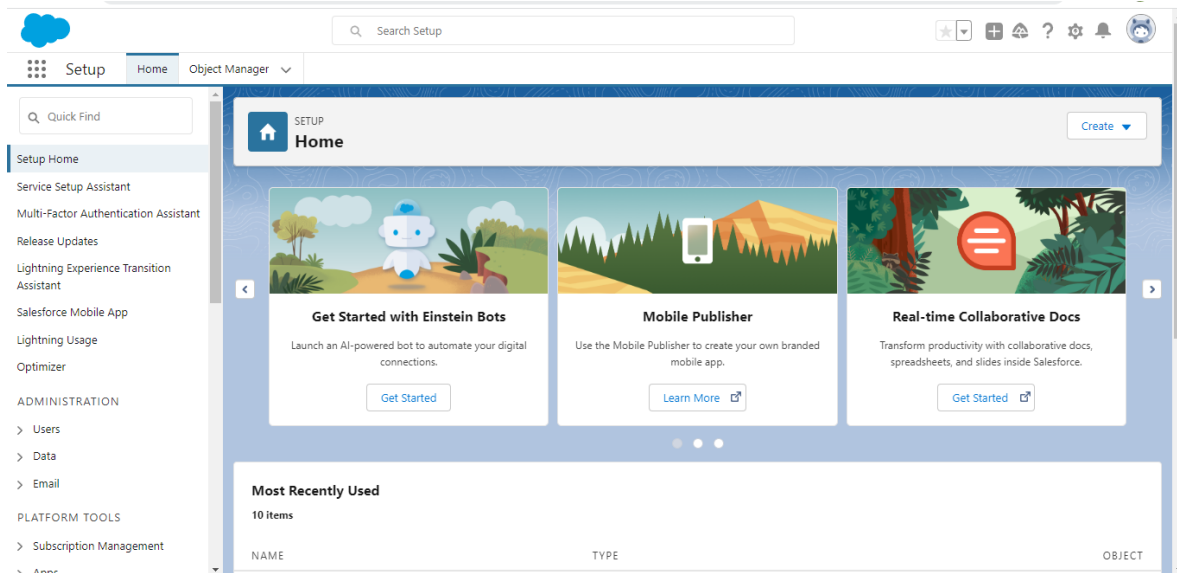
Object name	Fields in the Object	
School	Field label	Data type
	Address	Text Area(255)
	District	Text Area(255)
	State	Text Area
	School websites	Text Area
	Phone Number	Phone
	Number of students	Roll-up summary(COUNT student)
	Highest Marks	Roll-up summary(MAX students))
Student	Field label	Data type
	Phone Number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number(18,0)
	Marks	Number(18,0)

## Project Report Template

Parent		
	Field label	Data type
	Parent Address	Text Area(255)
	parent name	Text(80)
	Parent Number	Phone

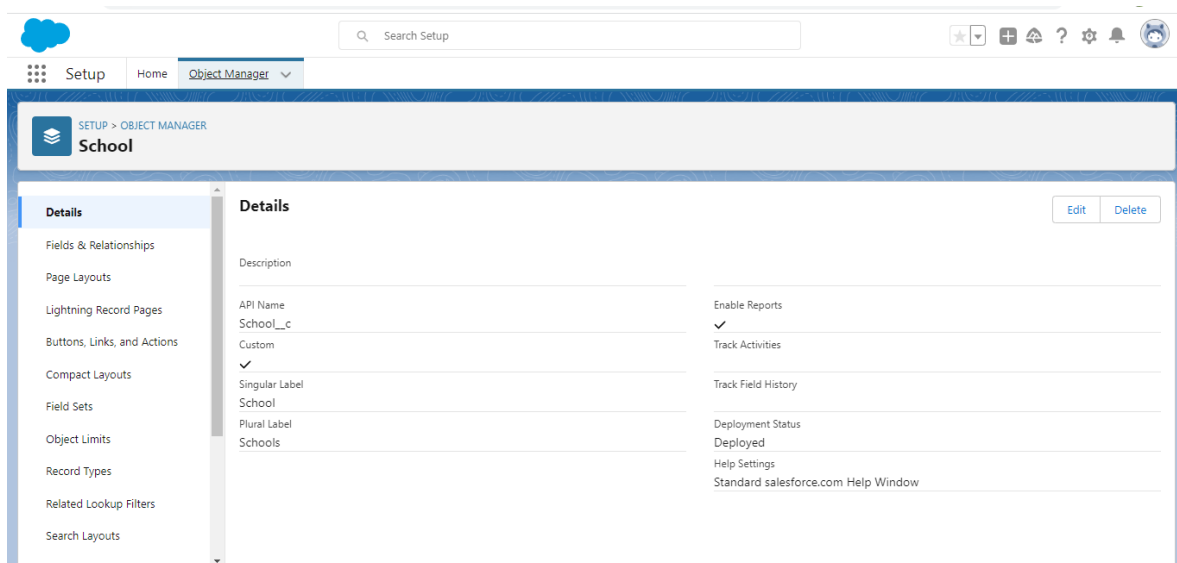
**Activity & Screenshot*****Milestone-1:******Activity :Creating Developer Account***

The screenshot shows the Salesforce login interface. At the top is the Salesforce logo, a blue cloud with the word "salesforce" in white. Below the logo is a white login box with a light gray border. Inside the box, there are two input fields: "Username" with the email "nithiyarnithiya83@gmail.com" and "Password" with masked characters. Below the password field is a blue "Log In" button. Under the button is a checkbox labeled "Remember me". At the bottom of the login box are two links: "Forgot Your Password?" and "Use Custom Domain". Below the login box, outside the white box, is the text "Not a customer?" followed by a button labeled "Try for Free".

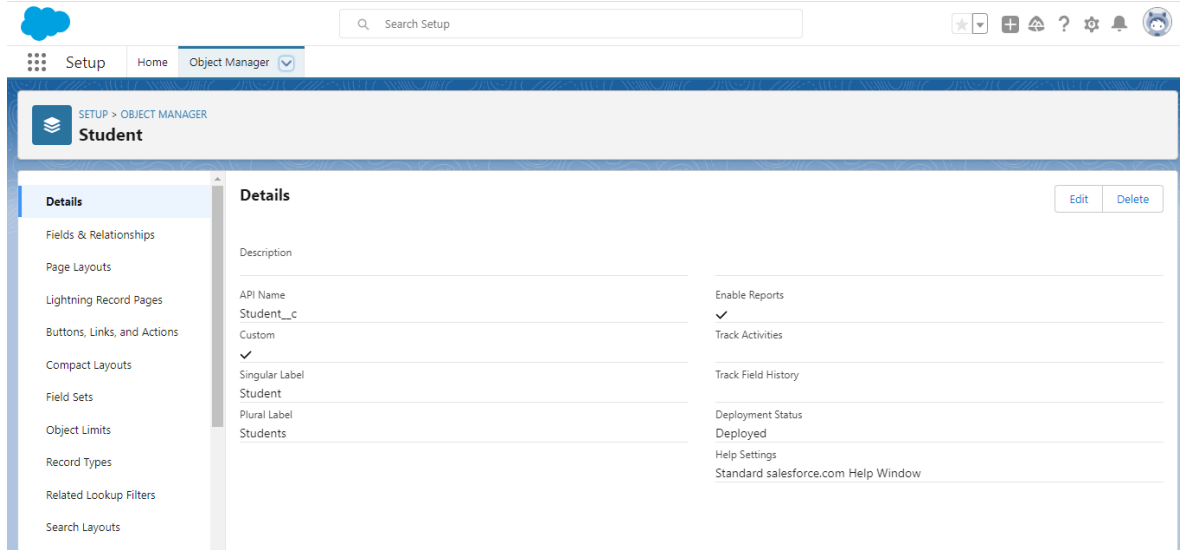


## MILESTONE-2:OBJECT

### Activity:CREATION OF SCHOOL OBJECT



### Activity-2:CREATION OF STUDENT OBJECT



**Setup** | Home | **Object Manager** ▾

SEARCH Setup

SETUP > OBJECT MANAGER

## Student

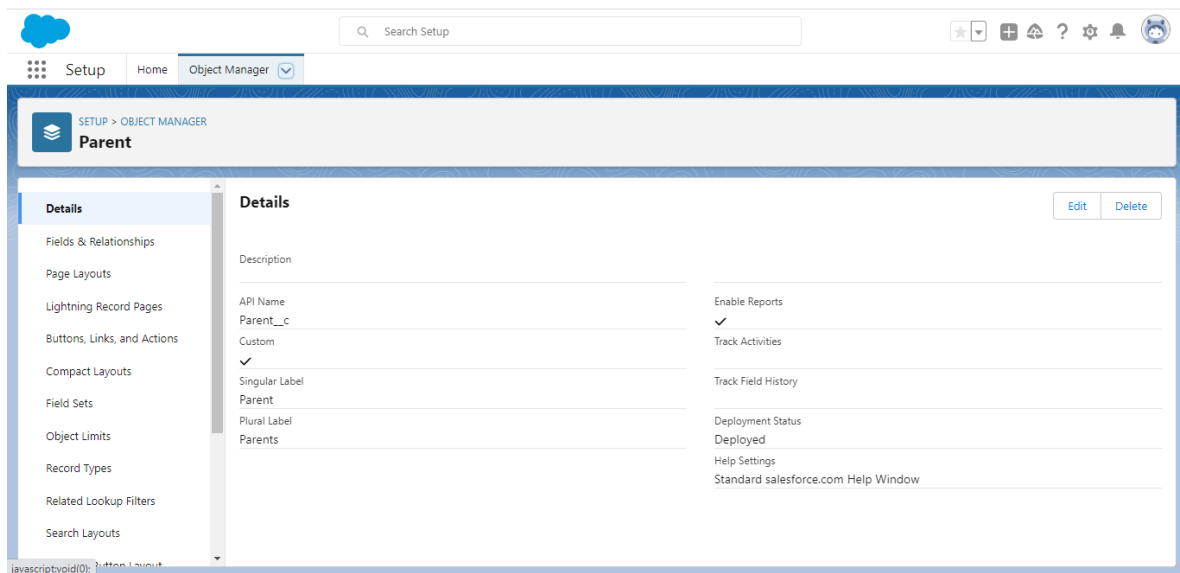
**Details** Edit Delete

Description	
API Name Student__c	Enable Reports ✓
Custom ✓	Track Activities
Singular Label Student	Track Field History
Plural Label Students	Deployment Status Deployed
	Help Settings Standard salesforce.com Help Window

**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

## Activity-3: CREATION OF PARENT OBJECT



**Setup** | Home | **Object Manager** ▾

SEARCH Setup

SETUP > OBJECT MANAGER

## Parent

**Details** Edit Delete

Description	
API Name Parent__c	Enable Reports ✓
Custom ✓	Track Activities
Singular Label Parent	Track Field History
Plural Label Parents	Deployment Status Deployed
	Help Settings Standard salesforce.com Help Window

**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

## MILESTONE-3: LIGHTNING APP

### Activity

# Project Report Template

New Lightning App

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## 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 Name ⓘ

\* Developer Name ⓘ

Description ⓘ

### App Branding

Image ⓘ



Clear

Primary Color Hex Value ⓘ

Next

New Lightning App

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## Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

### Available Items

### Selected Items

Schools

Students

Parents

Reports

Dashboards

Next

New Lightning App

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## User Profiles

Choose the user profiles that can access this app.

### Available Profiles

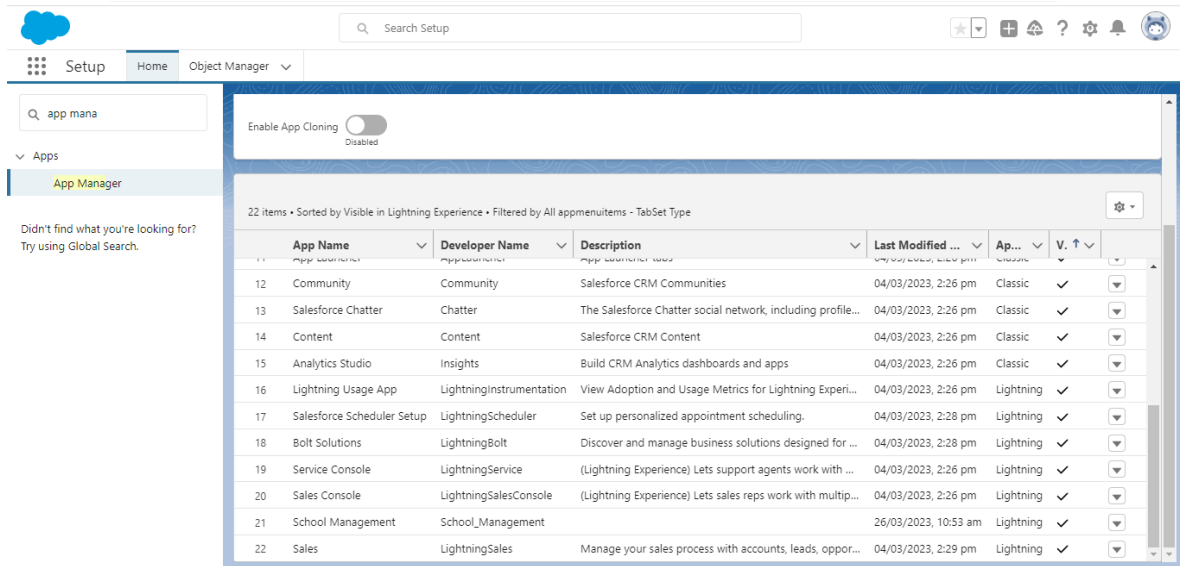
Salesforce API Only System Integrations

### Selected Profiles

System Administrator

Save & Finish





Enable App Cloning ☐ Disabled

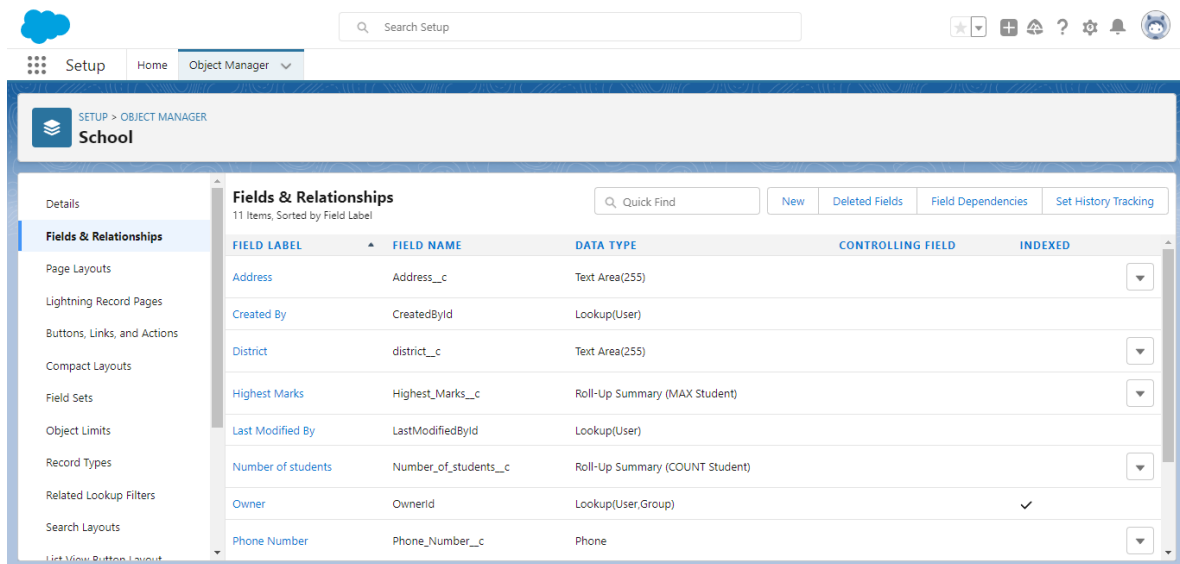
22 items • Sorted by Visible in Lightning Experience • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified ...	Ap...	V. ↑
12 Community	Community	Salesforce CRM Communities	04/03/2023, 2:26 pm	Classic	✓
13 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profile...	04/03/2023, 2:26 pm	Classic	✓
14 Content	Content	Salesforce CRM Content	04/03/2023, 2:26 pm	Classic	✓
15 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/03/2023, 2:26 pm	Classic	✓
16 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experi...	04/03/2023, 2:26 pm	Lightning	✓
17 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	04/03/2023, 2:28 pm	Lightning	✓
18 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for ...	04/03/2023, 2:28 pm	Lightning	✓
19 Service Console	LightningService	(Lightning Experience) Lets support agents work with ...	04/03/2023, 2:26 pm	Lightning	✓
20 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multip...	04/03/2023, 2:26 pm	Lightning	✓
21 School Management	School_Management		26/03/2023, 10:53 am	Lightning	✓
22 Sales	LightningSales	Manage your sales process with accounts, leads, oppor...	04/03/2023, 2:29 pm	Lightning	✓

## MILESTONE-4: CREATION OF FIELDS AND RELATIONSHIP

### Activity-1:

#### CREATION OF FIELDS FOR SCHOOL OBJECT:



SETUP > OBJECT MANAGER

**School**

Details

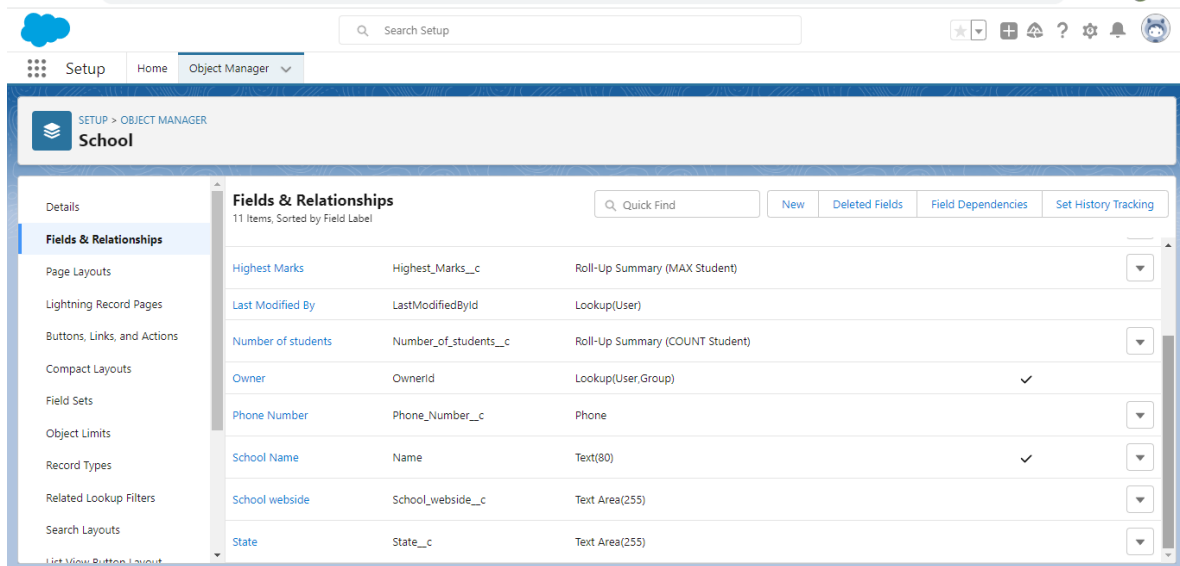
**Fields & Relationships**

11 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 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		

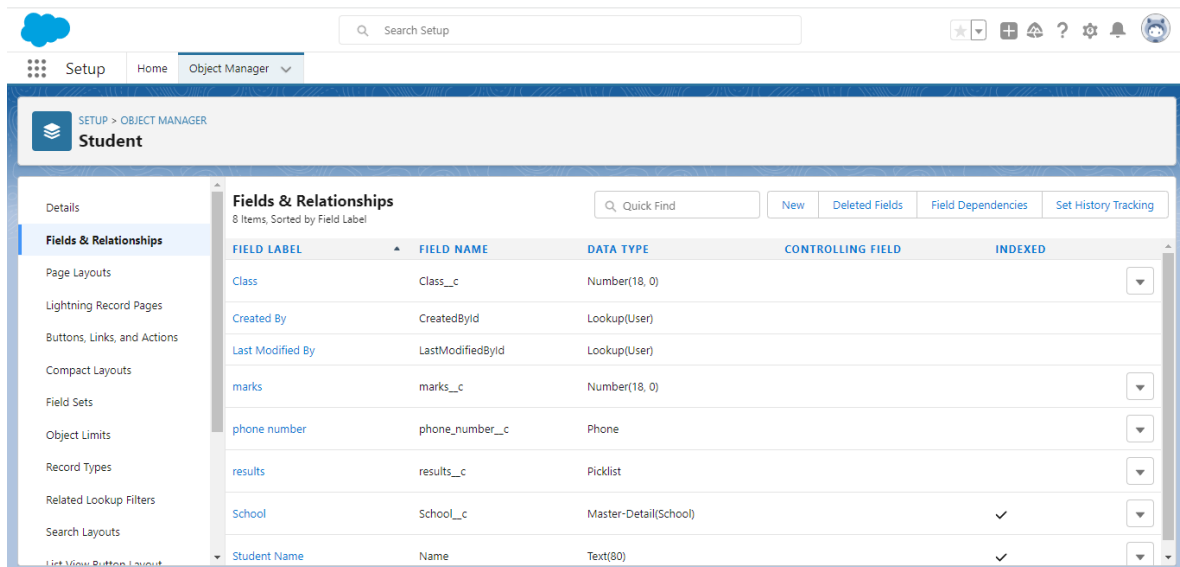


The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 11 items sorted by Field Label. The table lists fields such as Highest Marks, Last Modified By, Number of students, Owner, Phone Number, School Name, School website, and State, along with their data types and relationships.

Field Label	Field Name	Data Type	Controlling Field	Indexed
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		
School Name	Name	Text(80)	✓	
School website	School_website__c	Text Area(255)		
State	State__c	Text Area(255)		

## Activity-2:

### CREATION OF FIELDS FOR STUDENT OBJECT:

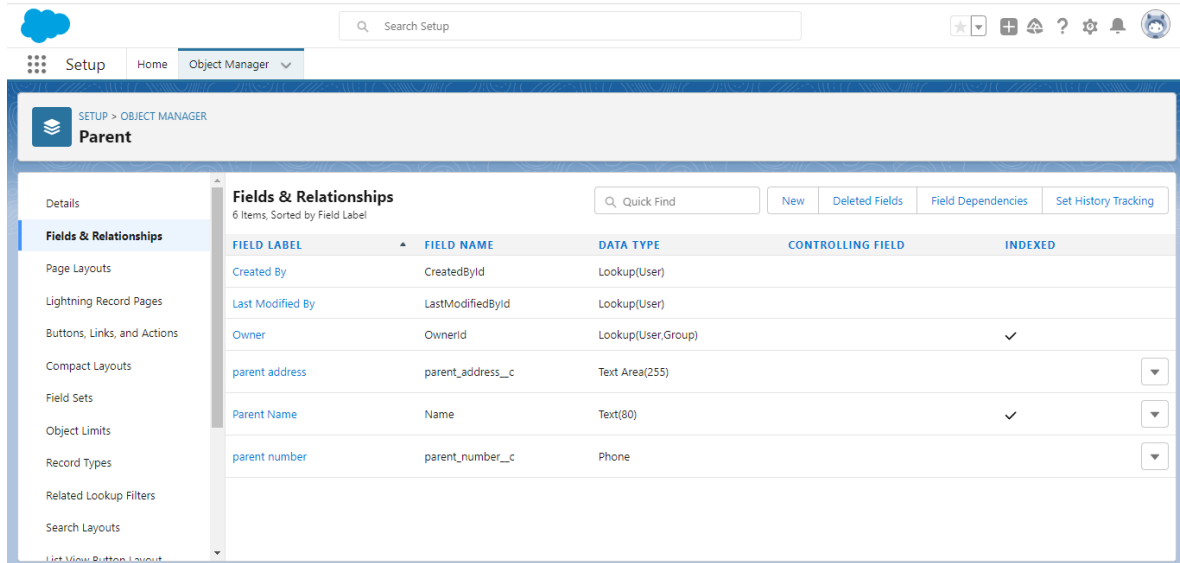


The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 8 items sorted by Field Label. The table lists fields such as Class, Created By, Last Modified By, marks, phone number, results, School, and Student Name, along with their data types and relationships.

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 PARENT OBJECT:



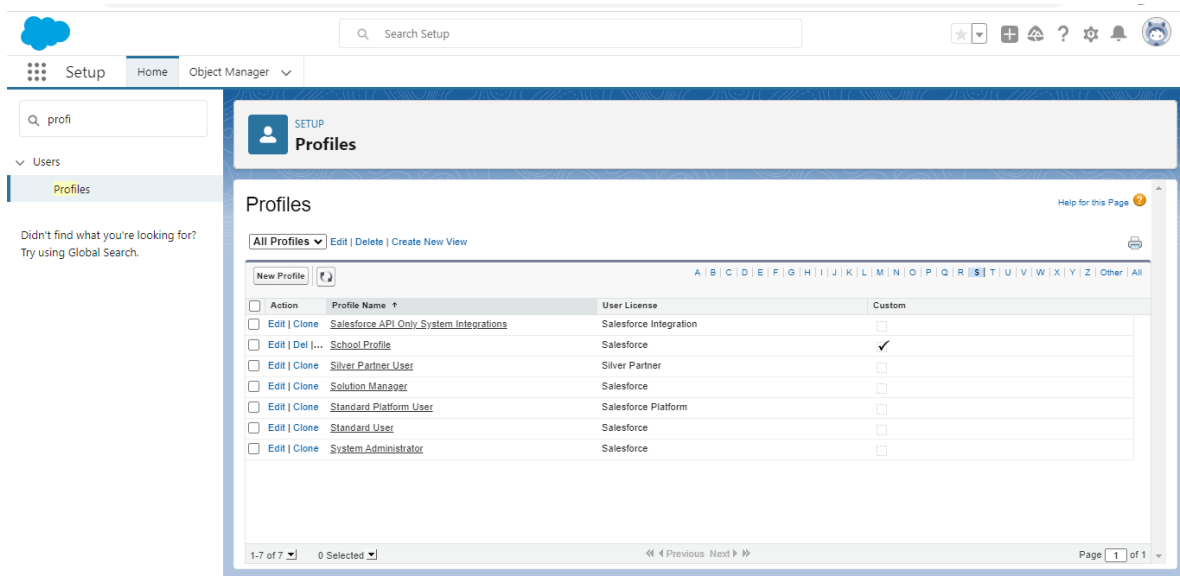
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a list of 6 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

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:PROFILES

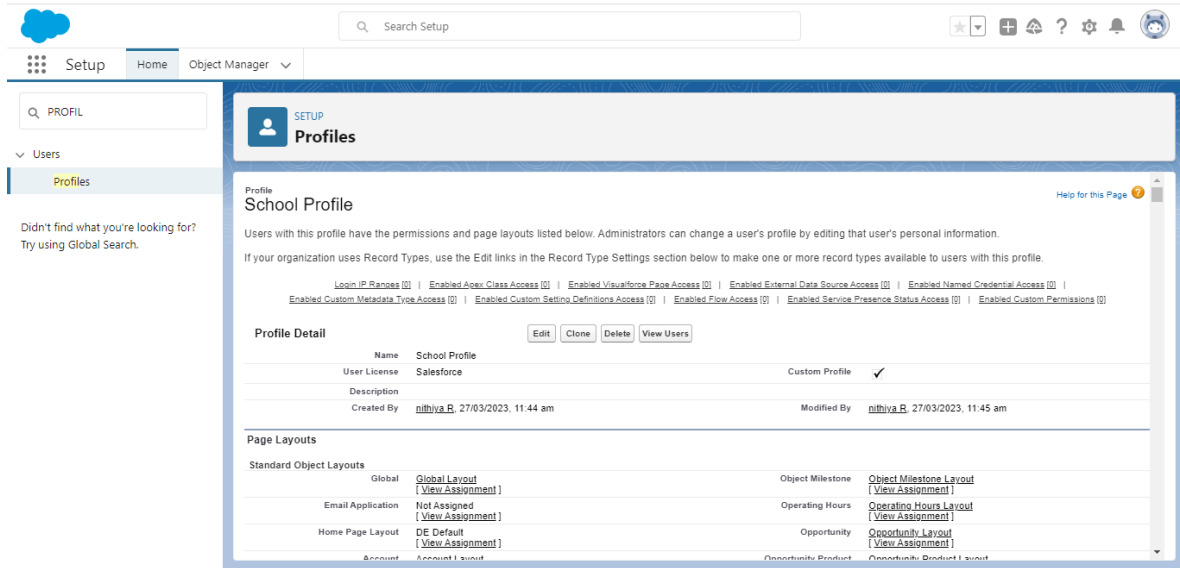
### Activity:

### CREATION OF PROFILES



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Profiles' table is displayed, showing a list of profiles. The table below represents the data shown in the screenshot:

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Salesforce API Only System Integrations</a>	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">School Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Silver Partner User</a>	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>



**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 \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	School Profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	nithiya.R. 27/03/2023, 11:44 am	Modified By	nithiya.R. 27/03/2023, 11:45 am

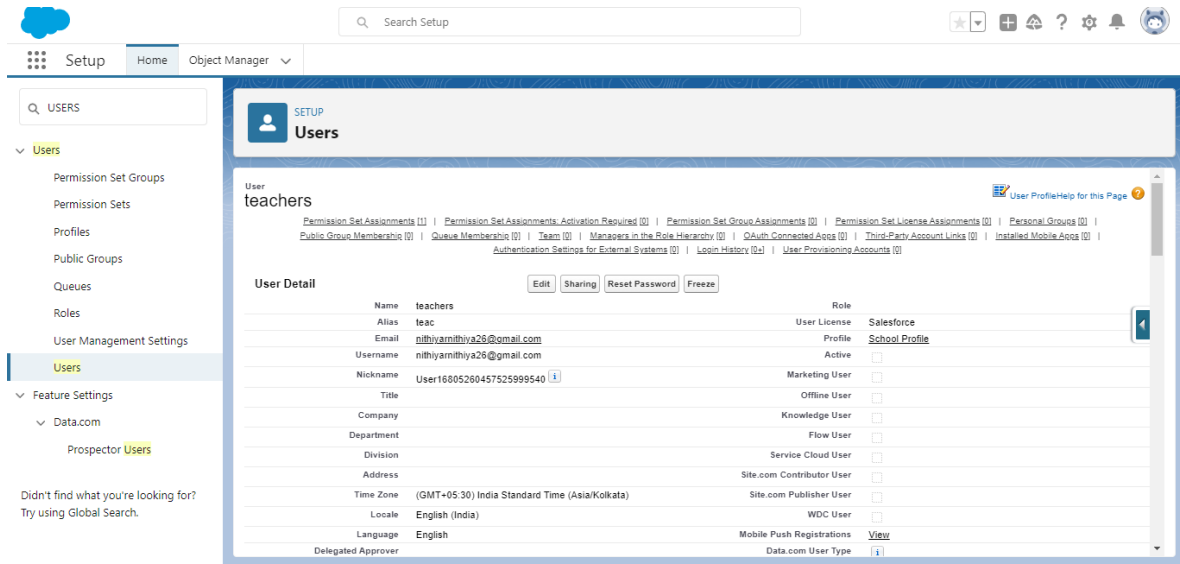
**Page Layouts**

Standard Object Layouts	Global	<a href="#">Global Layout [View Assignment]</a>	Object Milestone	<a href="#">Object Milestone Layout [View Assignment]</a>
Email Application	Not Assigned	<a href="#">[View Assignment]</a>	Operating Hours	<a href="#">Operating Hours Layout [View Assignment]</a>
Home Page Layout	DE Default	<a href="#">[View Assignment]</a>	Opportunity	<a href="#">Opportunity Layout [View Assignment]</a>
Account	Account Layout		Opportunity Product	<a href="#">Opportunity Product Layout [View Assignment]</a>

## MILESTONE-6:USERS

### Activity:CREATING AS USERS

#### 1)TEACHERS:-



**SETUP Users**

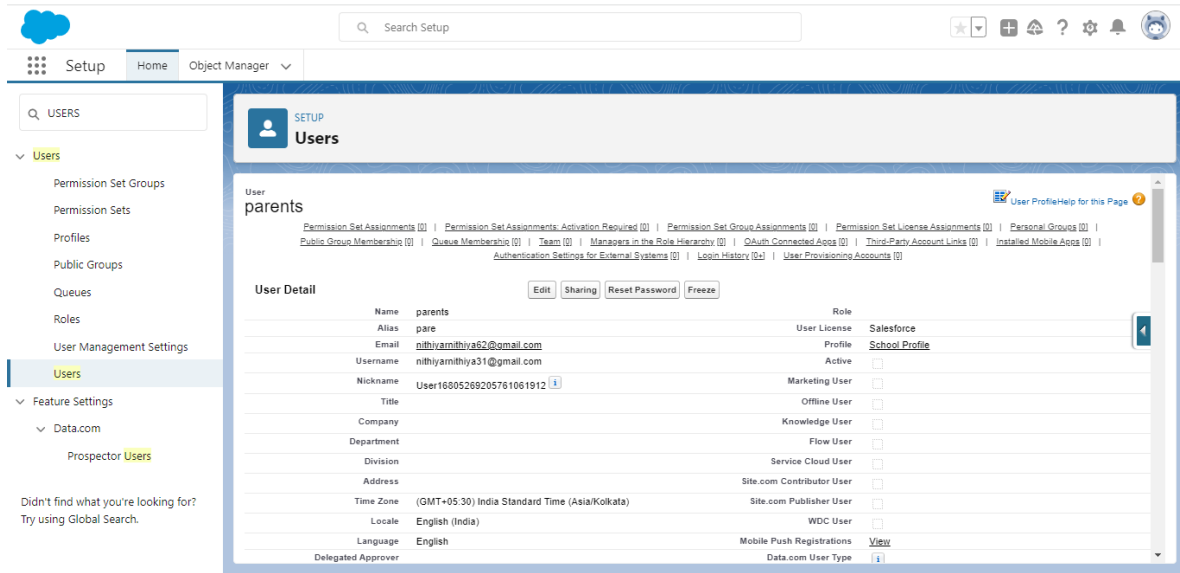
User: **teachers**

[Permission Set Assignments \[1\]](#) | [Permission Set Assignments Activation Required \[0\]](#) | [Permission Set Group Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[0\]](#) | [OAuth Connected Apps \[0\]](#) | [Third-Party Account Links \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [Authentication Settings for External Systems \[0\]](#) | [Login History \[24\]](#) | [User Provisioning Accounts \[0\]](#)

**User Detail** [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Name	teachers	Role	
Alias	teac	User License	Salesforce
Email	nithiyarnithiya28@gmail.com	Profile	School Profile
Username	nithiyarnithiya28@gmail.com	Active	<input type="checkbox"/>
Nickname	User16805260457525999540 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	[i]

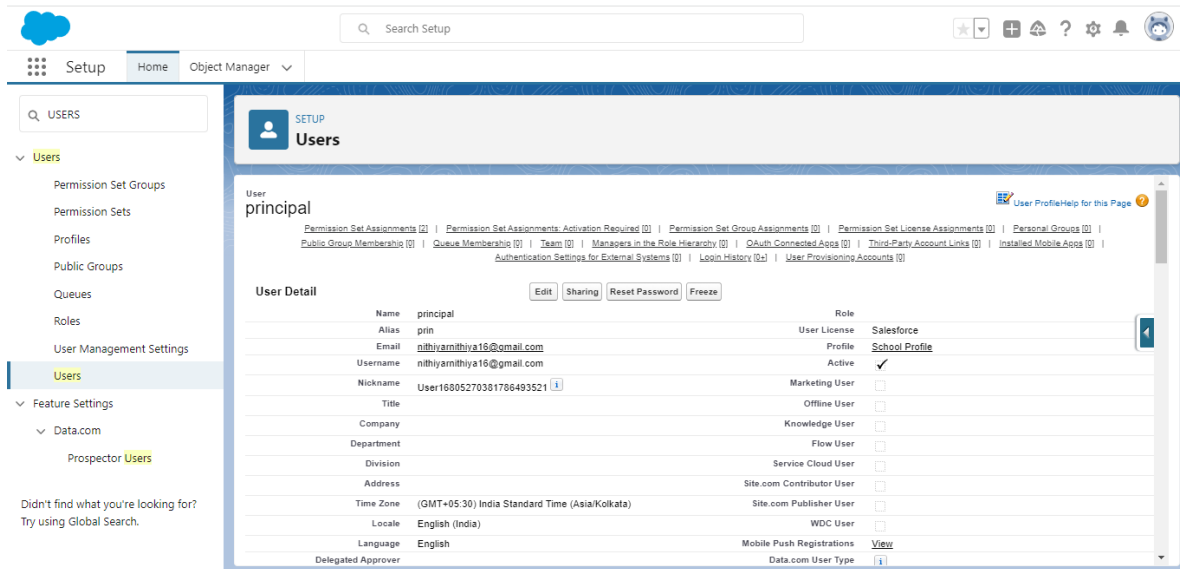
#### 2)PARENTS



The screenshot shows the 'Users' setup page in the Smart Internz application. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar for 'USERS'. The main content area displays the 'User Detail' for a user named 'parents'. The user's email is 'nithiyarnithiya62@gmail.com' and their nickname is 'User16805269205761061912'. The user is assigned the 'Salesforce' role and the 'School Profile' profile. The 'Active' checkbox is checked. The 'Delegated Approver' field is empty.

Name	parents	Role	Salesforce
Alias	pare	User License	Salesforce
Email	nithiyarnithiya62@gmail.com	Profile	School Profile
Username	nithiyarnithiya31@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16805269205761061912	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	1

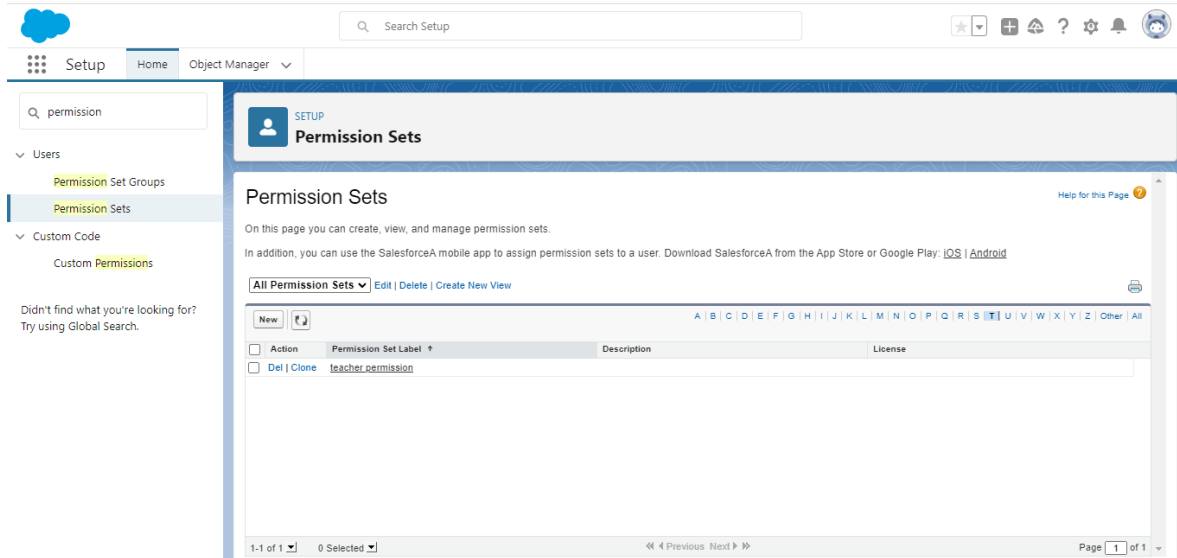
### 3)PRINCIPAL



The screenshot shows the 'Users' setup page in the Smart Internz application. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar for 'USERS'. The main content area displays the 'User Detail' for a user named 'principal'. The user's email is 'nithiyarnithiya16@gmail.com' and their nickname is 'User16805270381786493521'. The user is assigned the 'Salesforce' role and the 'School Profile' profile. The 'Active' checkbox is checked. The 'Delegated Approver' field is empty.

Name	principal	Role	Salesforce
Alias	prin	User License	Salesforce
Email	nithiyarnithiya16@gmail.com	Profile	School Profile
Username	nithiyarnithiya16@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16805270381786493521	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	1

### MILESTONE-7:PERMISSION SETS

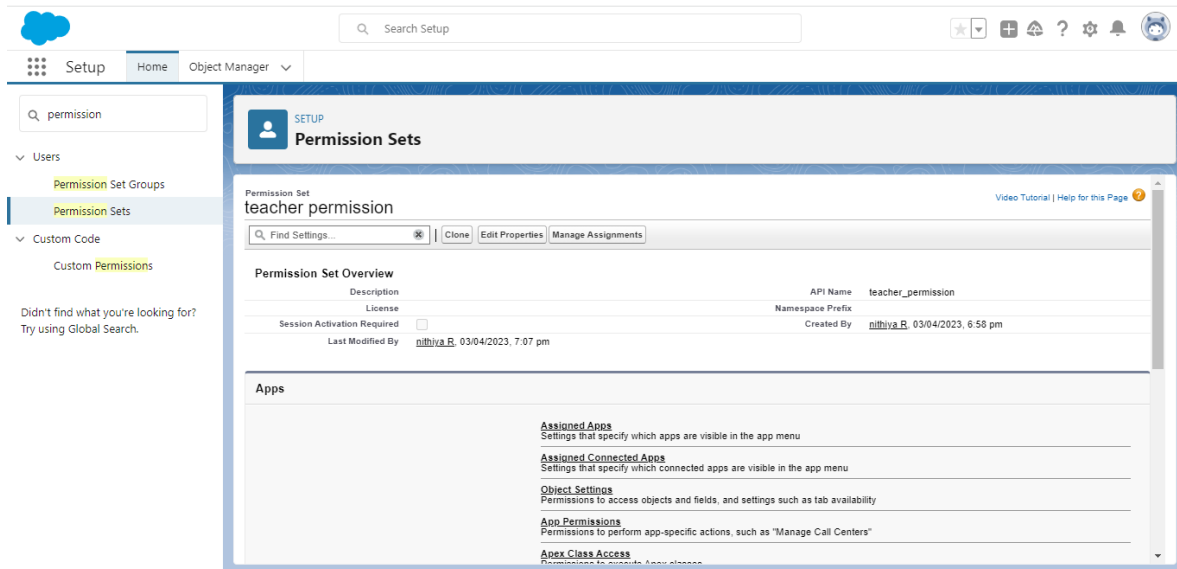


The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and includes a search bar, a "New" button, and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. One permission set, "teacher\_permission", is listed.

Action	Permission Set Label	Description	License
<a href="#">Del</a>   <a href="#">Clone</a>	teacher_permission		

## Activity-1:

### PERMISSION SET 1:Teacher Permission

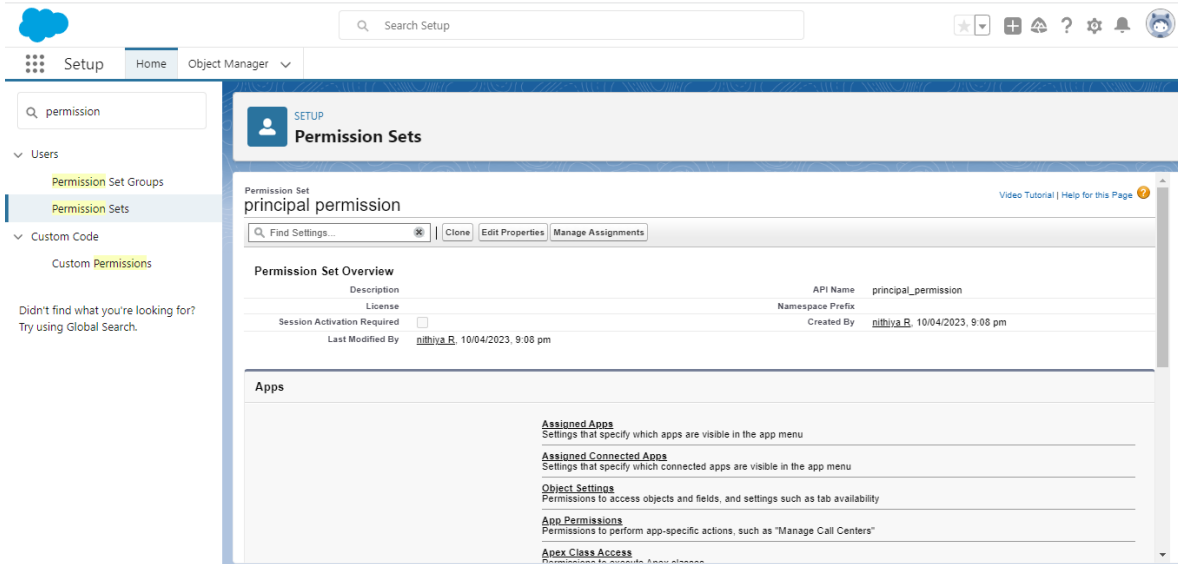


The screenshot shows the Salesforce Setup interface for the "teacher\_permission" permission set. The left sidebar is the same as the previous screenshot. The main content area is titled "teacher\_permission" and includes a search bar, a "Find Settings" button, and a "Permission Set Overview" section. The overview section displays the API Name, License, Session Activation Required, Last Modified By, Namespace Prefix, and Created By. Below the overview is an "Apps" section with links to "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", and "Apex Class Access".

Permission Set Overview	
Description	API Name: teacher_permission
License	Namespace Prefix
Session Activation Required	Created By: nithya.R 03/04/2023, 6:56 pm
Last Modified By: nithya.R 03/04/2023, 7:07 pm	

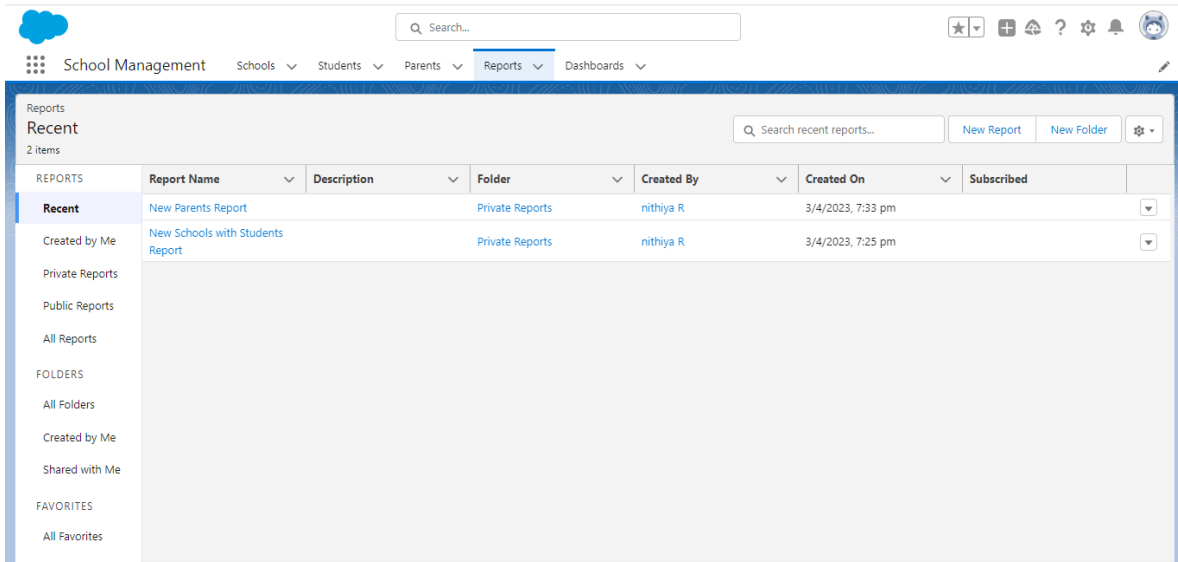
## Activity-2:

### PERMISSION SET 2:Principal Permission



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and shows the "principal permission" set. It includes a "Find Settings" search bar, "Clone", "Edit Properties", and "Manage Assignments" buttons. Below this is a "Permission Set Overview" table with columns for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. The table shows the "principal\_permission" set, created by "nithiya R" on 10/04/2023 at 9:08 pm. Below the table is an "Apps" section with links to "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", and "Apex Class Access".

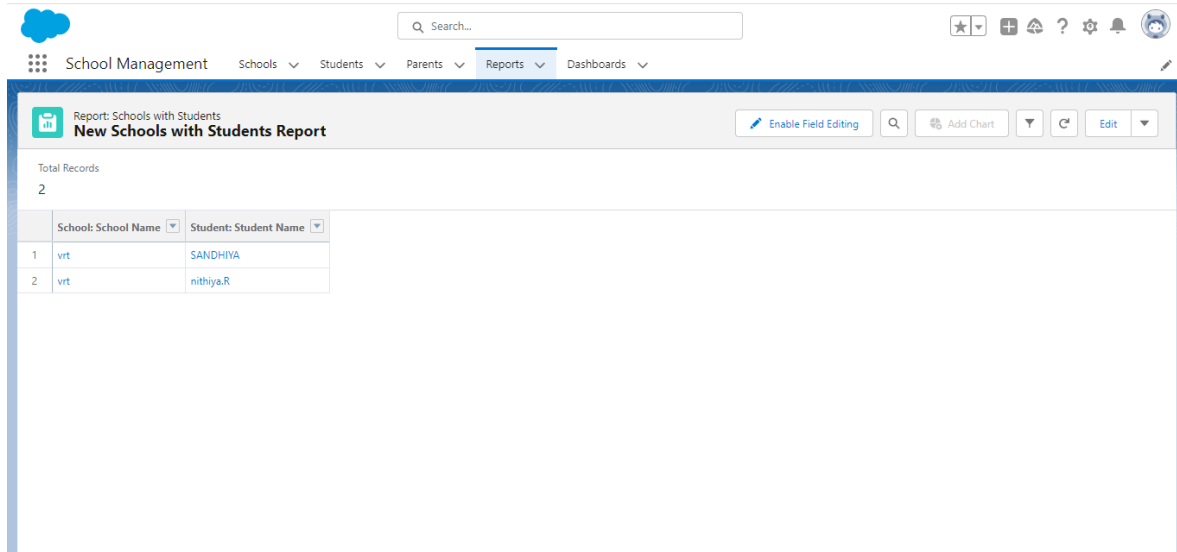
## MILESTONE-8:REPORTS



The screenshot shows the Salesforce Reports page. The left sidebar contains navigation links: School Management, Schools, Students, Parents, Reports, and Dashboards. The main content area is titled "Reports" and shows a list of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table shows two reports: "New Parents Report" and "New Schools with Students Report", both created by "nithiya R" on 3/4/2023. The "Recent" report is highlighted in blue.

## Activity:

### 1)SCHOOL WITH STUDENTS REPORT



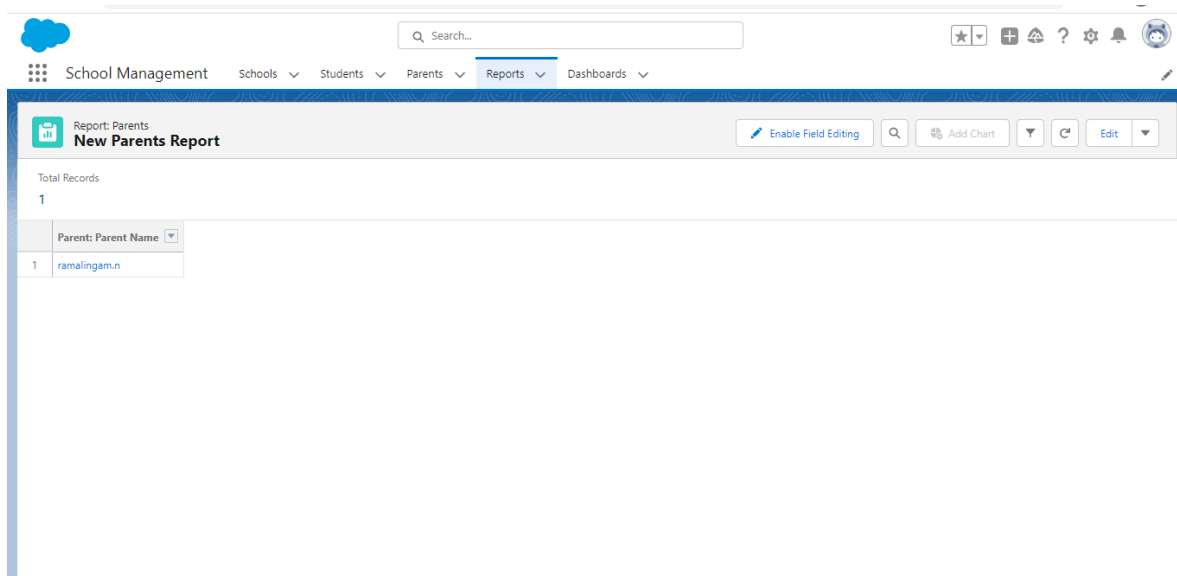
Report: Schools with Students  
**New Schools with Students Report**

Enable Field Editing

Total Records  
2

	School: School Name	Student: Student Name
1	vrt	SANDHIYA
2	vrt	nithiya.R

### 2)PARENT REPORT



Report: Parents  
**New Parents Report**

Enable Field Editing

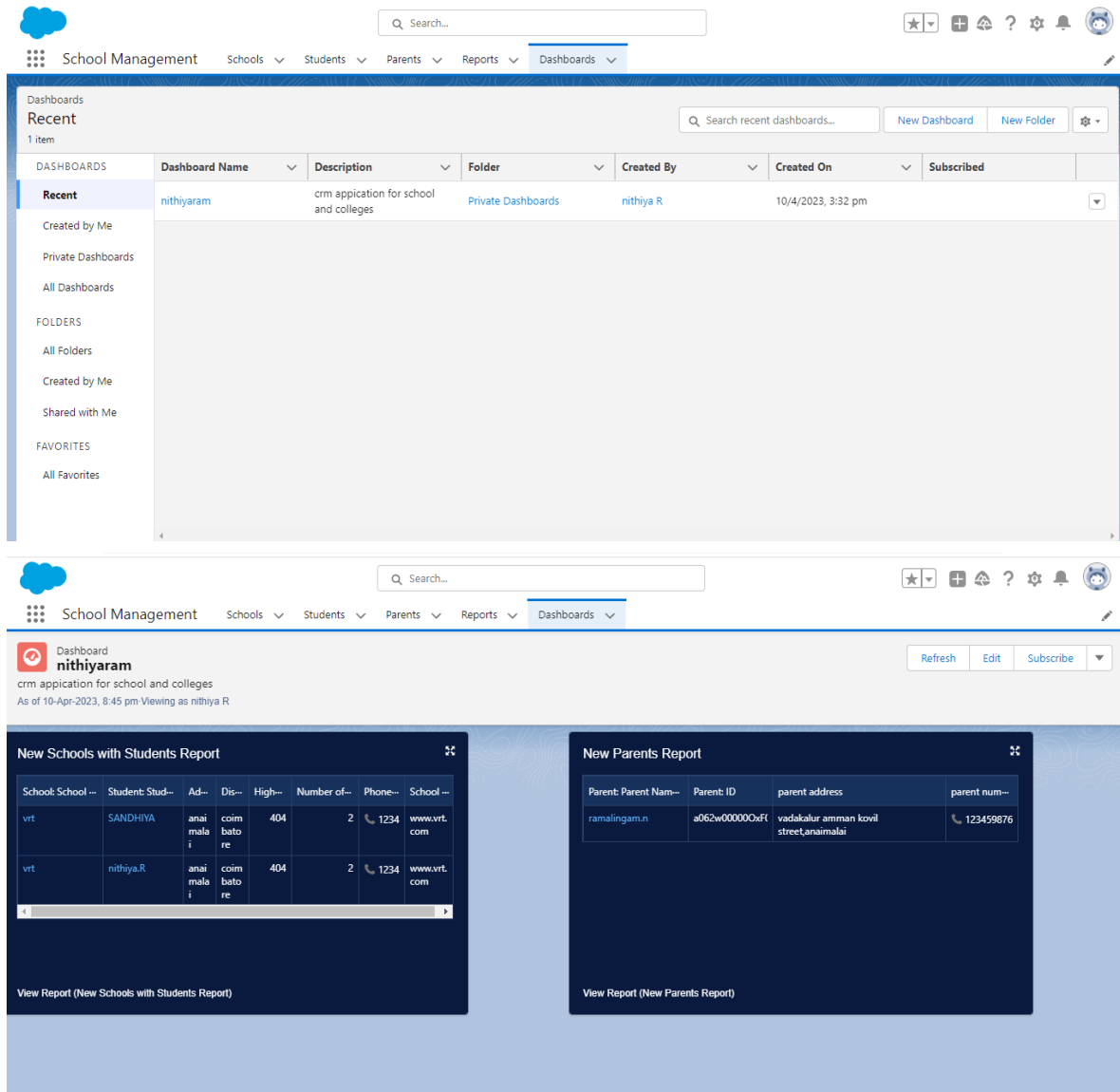
Total Records  
1

	Parent: Parent Name
1	ramalingam.n

### MILESTONE-8:DASHBOARDS

## Activity:





The screenshot displays the Smart Internz School Management Dashboard. The top navigation bar includes a search bar, utility icons, and a menu with options like School Management, Schools, Students, Parents, Reports, and Dashboards. The main content area shows a 'Recent' dashboard with a table of recent dashboards. Below this, there are two report widgets: 'New Schools with Students Report' and 'New Parents Report'.

**Recent Dashboards Table:**

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	nithiyaram	crm application for school and colleges	Private Dashboards	nithiya R	10/4/2023, 3:32 pm	

**New Schools with Students Report Table:**

School: School --	Student: Stud--	Ad--	Dis--	High--	Number of--	Phone--	School --
vrt	SANDHIYA	anai mala i	coim bato re	404	2	1234	www.vrt.com
vrt	nithiya.R	anai mala i	coim bato re	404	2	1234	www.vrt.com

**New Parents Report Table:**

Parent: Parent Nam--	Parent: ID	parent address	parent num--
ramalingam.n	a062w00000Cxft	vadakalur amman kovil street,anaimalai	123459876

## 2.Trailhead Profile Public URL

Team Lead -TELMA TELSIYA.S

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

Team Member 1-NITHYA.R

<https://trailblazer.me/id/nithr46>

Team member 2-UMADEVI.S

<https://trailblazer.me/id/umadevi41>

TEAM 3- VIKRAM.D

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

TEAM MEMBER 4-BEAULA.A

<https://trailblazer.me/id/beula13>

### 3)ADVANTAGES & DISADVANTAGE

#### ADVANDATES:-

##### **\*IMPROVED COMMUNICATIONS:**

With a CRM application in place,school administrators and teachers can communicate with parents and students through a single platform.

##### **\*ENHANCED DATA MANAGEMENT:**

This makes it easiest for schools to keep track of and make informed decisions regarding their academic per

##### **\*DATA ANALYTICS:**

This can help schools to improve their academic programs,attract more students, and stay ahead of the competition.

##### **\*INCREASED ACCOUNTABILITY:**

This helps to create a culture of excellence and motivates everyone to work harder towards the common goal of academic success

#### DISADVANTAGES:-

##### **\*COST**

CRM applications can be expensive to purchase,maintain and then implement

##### **\*DATA PRIVACY:**

Schools must ensure that their CRM applications are secure and compliant with data privacy laws to protect students' information from unauthorized access or misuse.

**\*TECHNICAL ISSUES:**

This can lead to delay in critical operations such as class scheduling, report generations and communications.

**\*INCOMPLETE DATA:**

This can lead to inaccurate reports for analysis and may hinder decisions-making

### **3.APPLICATIONS**

#### **STUDENT RELATIONSHIP MANAGEMENT:**

A CRM application can help schools manage their relationship with students more effectively . This can include features like creating student profiles, tracking student behavior and academic progress, and monitoring student attendance.

Additionally, a CRM application for school can enhance communication between staff, students and parents.

**EXAMPLE:**

- 1.Streamlining administrative tasks and workflows**
- 2. Enhancing communications between staff, students, and parents**
- 3. Improving students engagement and academic success**
- 4. Facilities data-driven decisions and student interventions**

In this summary, there are many potential benefits to implementing a CRM application for school.

### **3.CONCLUSION**

In conclusion, the use of a CRM application in school management can bring significant benefits to the learning environment. By collecting and centralized student data, teachers and administrators can make data-driven decisions and personalize the learning experience for each student.

This application can also enhance communication and collaboration among staff, students, and parents. With features such as messaging, scheduling, and progress

tracking, a CRM application can make administrative tasks more efficient and streamlined, leaving more time for teachers to focus on teaching and students to focus on learning.

Overall, a CRM application for school management can greatly improve the effectiveness and efficiency of a school operations, leading to a better student outcomes environment for all. As technology continues to play an increasingly important role in education, schools that embrace CRM applications as a way to manage and engage with their students will be better equipped to meet the challenge of the future. By using a CRM application in school managements, school can stay competitive, better serve their students, and help them to achieve academic and personal

### **3.FUTURE SCOPE**

The future scope of CRM application for school management is promising, as technology continues to evolve and become more advanced.

#### **1.AI AND MACHINE LEARNING:**

With advancement in AI and machine learning, CRM applications could become even more personalized and intuitive, adapting to the needs of individual students and providing targeted support and resources.

#### **2.INTEGRATED COMMUNICATION:**

As school becomes more digitally connected, CRM application could integrate with various communication channel such as social media, messaging, and email to provide seamless and efficient communication be, students, and parent

#### **3.ASSESSMENT AND ANALYTIC:**

CRM applications could incorporate advanced assessment and analytics and student success.

#### **4.GAMIFICATION:**

Gamification is a powerful tool that can be used to motivate students and make learning fun. Future CRM applications could incorporate gamification elements to make learning more engaging and interactive.

#### **5.AUGMENTED REALITY:**

With the rise of augmented reality technology, CRM applications could provide immersive and interactive learning experiences, making it easiest for students to visualize and understand complex concepts.

## **6.MOBILE OPTIMIZATION:**

**As mobile becomes increasingly prevalent, CRM applications for school management could become more optimizing for mobile devices, allowing teachers, students, and parents to access information and communicate from anywhere at any time.**

**Overall, as technology continues to evolve the future of CRM applications in school management is bright. By leveraging the latest advancements in AI, communication, assessments, and gamification, CRM applications can help schools better engage with students, promote academic success, and prepare them for the challenges of the future.**