

A CRM APPLICATION FOR SCHOOL/COLLEGES

1. INTRODUCTION :

1.1 OVERVIEW :

Customer Relationship Management or CRM Software enables educational institutions such as school colleges to manage relationships with students, parents, staff, alumni and other stakeholders. It handles all aspects of the entire student lifecycle, from enrollment and academic progress tracking to fundraising management and reporting tools.

1.2 PURPOSE :

By use of this project, it enhances students life cycle experience and to improve understanding of difficult points.

2 PROBLEM DEFINITION & DESIGN THINKING :

2.1 EMPATHY MAP :

Says

What have we heard them say?
What can we imagine them saying?

**User-
friendly
dashboard.**

**Counselling
and
interviewed
management.**

**Online
evaluation
and
assessment.**

**Tools for an
automated
online
admission
process.**



CRM APPLICATION FOR SCHOOLS/ COLLEGES



**ID and
password for
each individual
to check their
personal
information.**

**Additional
information
about Hostel.**

**Need of e-
books for
every
subject.**

**Keep track of
students like
attendance
alerts.**

**Customizable
software that
provides end-
to-end
functionality.**



**Available of
bilingual
languages.**



**Solid
security
features for
datas.**

**Lack of
server to
view results.**

**Send individual
emails or
scheduled
automated
emails.**

**Accessible
from any
devices (phones and
computer).**

**Reporting
capabilities
are limited.**

**Issues for
uploading
files.**

Does

What behavior have we observed?
What can we imagine them doing?

Thinks

What are their wants, needs, hopes,
and dreams? What other thoughts
might influence their behavior?

Feels

What are their fears, frustrations, and
anxieties? What other feelings might
influence their behavior?

2.2 IDEATION AND BRAINSTROMING MAP :

The image displays a grid of 12 templates for idea generation and prioritization, organized into three rows and four columns. Each template is designed to facilitate collaborative brainstorming and idea selection.

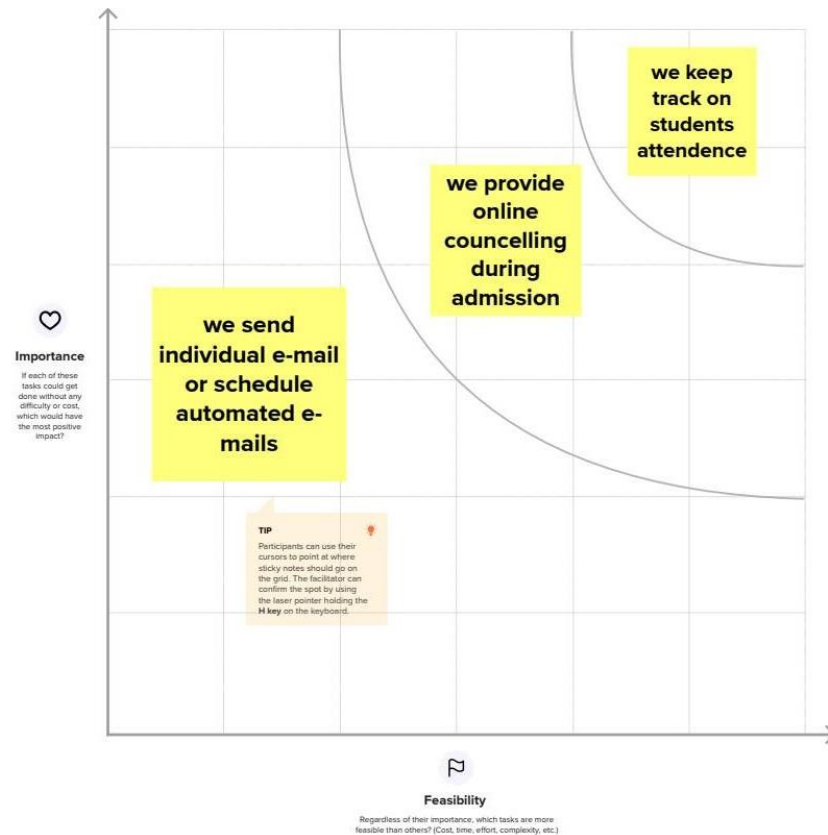
- Row 1: Brainstorming and Group Ideas**
 - Before you collaborate:** A template for setting the stage for collaboration, including a goal and a list of participants.
 - Brainstorm:** A template for generating ideas, featuring a central box for the problem statement and a grid for recording ideas.
 - Group ideas:** A template for generating ideas in a group, featuring a central box for the problem statement and a grid for recording ideas.
- Row 2: Idea Prioritization**
 - Idea prioritization:** A template for prioritizing ideas, featuring a grid for recording ideas and a list of criteria for selection.
 - Idea prioritization:** A template for prioritizing ideas, featuring a grid for recording ideas and a list of criteria for selection.
 - Idea prioritization:** A template for prioritizing ideas, featuring a grid for recording ideas and a list of criteria for selection.
- Row 3: Idea Prioritization**
 - Idea prioritization:** A template for prioritizing ideas, featuring a grid for recording ideas and a list of criteria for selection.
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 - Idea prioritization:** A template for prioritizing ideas, featuring a grid for recording ideas and a list of criteria for selection.

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



→

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.

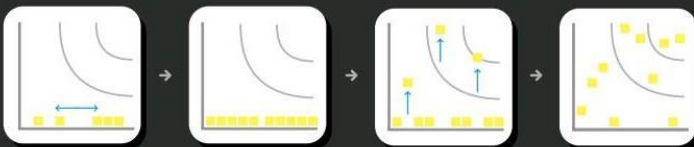
Quick add-ons

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

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](#)



Person 1

we make user friendly dashboard	we will add additional information about hostel	

Person 2

we provide solid security for data	we send individuals e-mail or schedule automated e-mails	

Person 3

we keep track on students attendance	we provide online counselling during admission	

Person 4

we resolve the issues for uploading files	we provide notification for every events	

3. RESULT :

3.1 DATA MODEL :

OBJECT NAME	FIELDS IN THE OBJECT	
	FIELD LABEL	DATA TYPE
SCHOOL	Address	Text area
	District	Text area
	State	Text area
	School	Text area
	Phone number	Phone
	Number of students	Roll up summary
	Highest Marks	Roll up summary
STUDENTS	Phone number	Phone
	School	Master detail relationship
	Results	Pick list
	Class	Number
	Marks	Number
PARENTS	Parent address	Text area
	Parent number	Phone

3.2 ACTIVITY AND SCREENSHOT :

MILESTONES 1: Creating an Account

ACTIVITY: Creating Developer Account

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free.

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Developer

Company*
Company Name

Country/Region*
Select Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

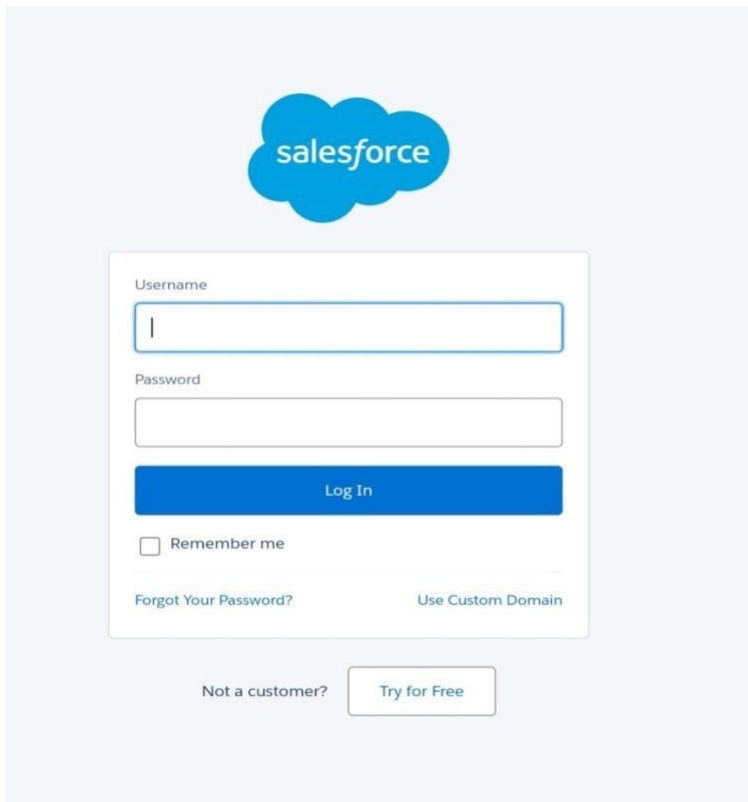
☐ I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Sign me Up

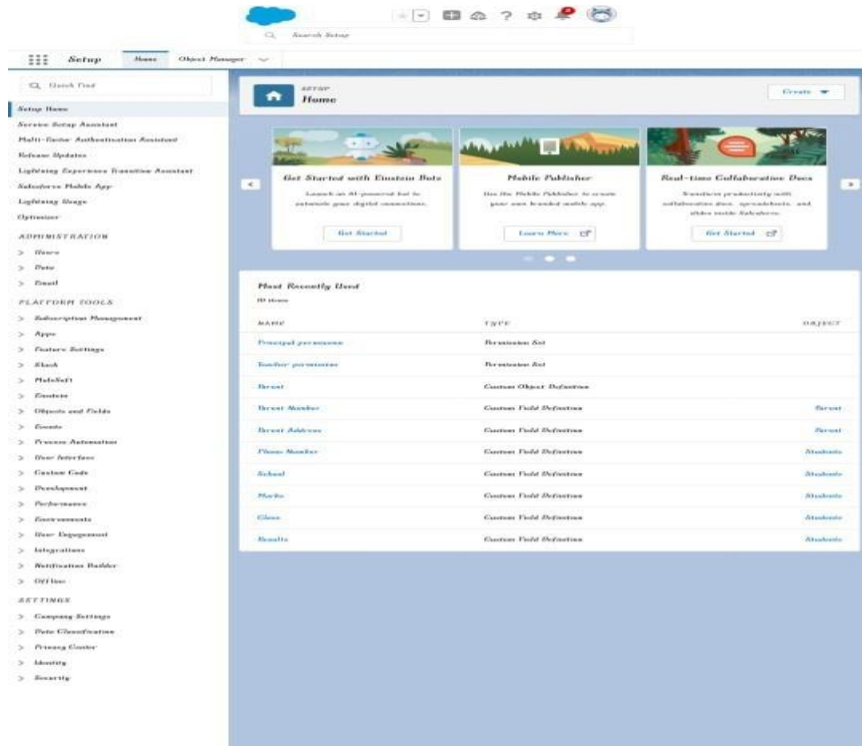
Already have a Salesforce Developer Environment?
[Log in](#)

From this go to <http://developers.salesforce.com/signup> and enter all the given details and then your account will be activated .



The image shows the Salesforce login page. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white rectangular login form. Inside the form, there are two input fields: the first is labeled "Username" and contains a single vertical bar character; the second is labeled "Password" and is empty. Below these fields is a blue rectangular button with the text "Log In" in white. Under the button is a checkbox labeled "Remember me". At the bottom of the form, there are two links: "Forgot Your Password?" on the left and "Use Custom Domain" on the right. Below the login form, there is the text "Not a customer?" followed by a button labeled "Try for Free".

Next go to <http://salesforce.com/login> and then enter the user name and password .



The home page will be displayed like this .

MILESTONES 2: OBJECT :

ACTIVITY: Creation of object

Search Setup

Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by adding custom profiles. [Set up a profile](#) [Don't show this message again](#)

Custom Object Definition Edit

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 noun (used) ☐

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

Object Name Example: Account

Description

Custom-Definition Help Setting ☒ Open the standard Salesforce user Help & Training window. ☐ Open a window using a Visualforce page.

Custom Name

Enter Record Name Label and Format

The Record Name appears on page layouts, key lists, related lists, linkages, 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 Example: Account Name

Name Type

Optional Features

☐ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Learning [x](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☐ Allow Search

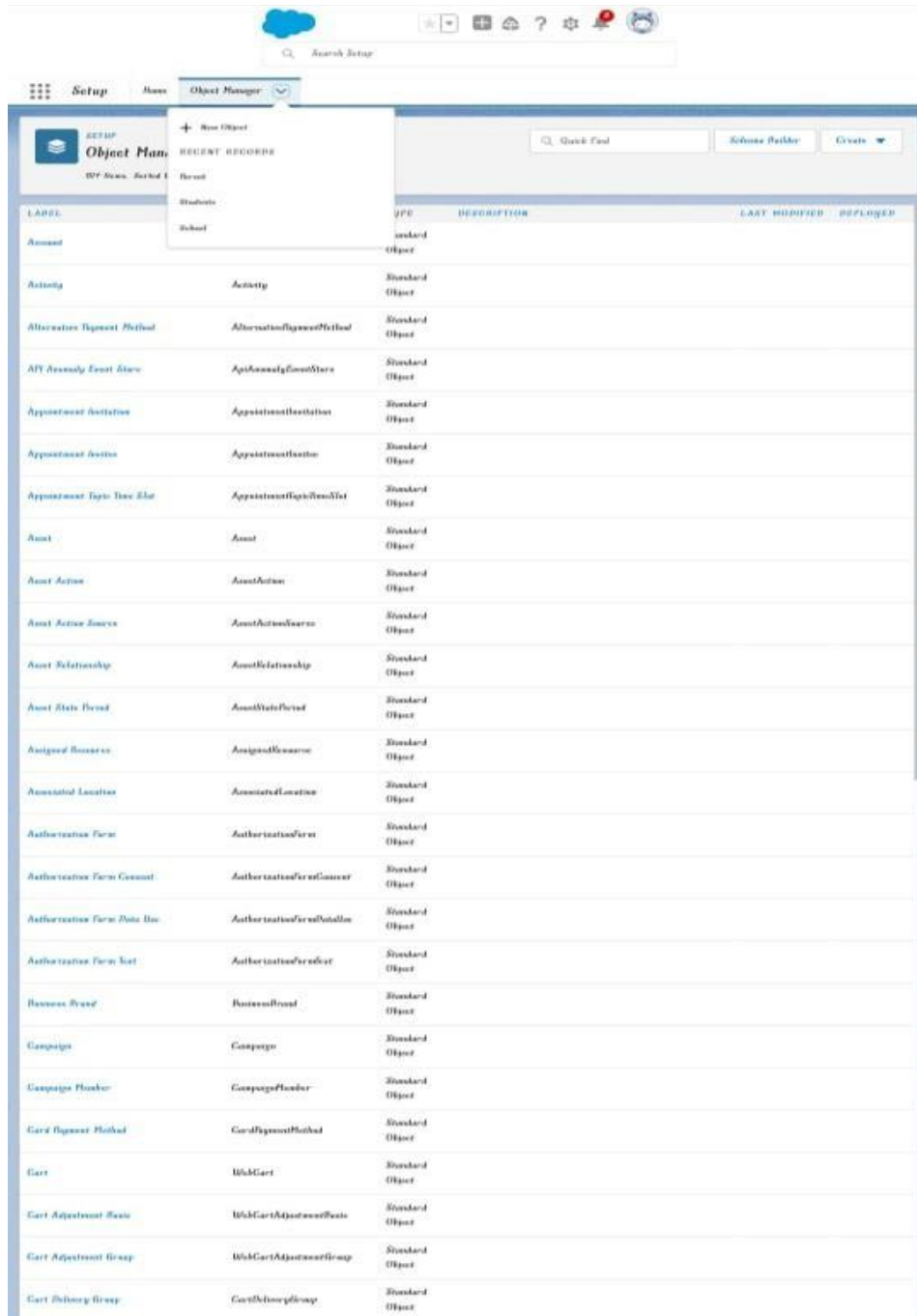
Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after creating this custom object

Save Save & New Cancel

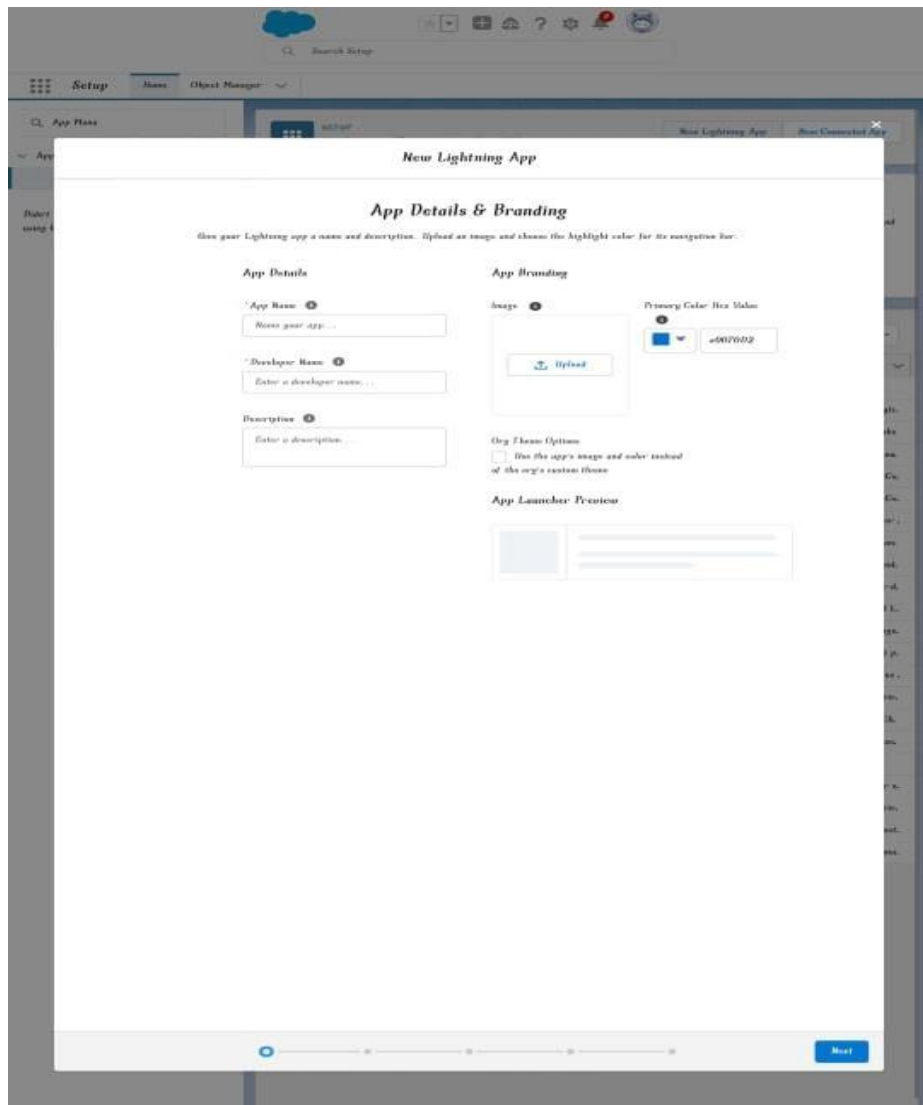
From this page select the object manager and then select the custom object and enter all given details to create school object .



Follow the same procedure to create student and parent object.

MILESTONE 3: LIGHTNING APP :

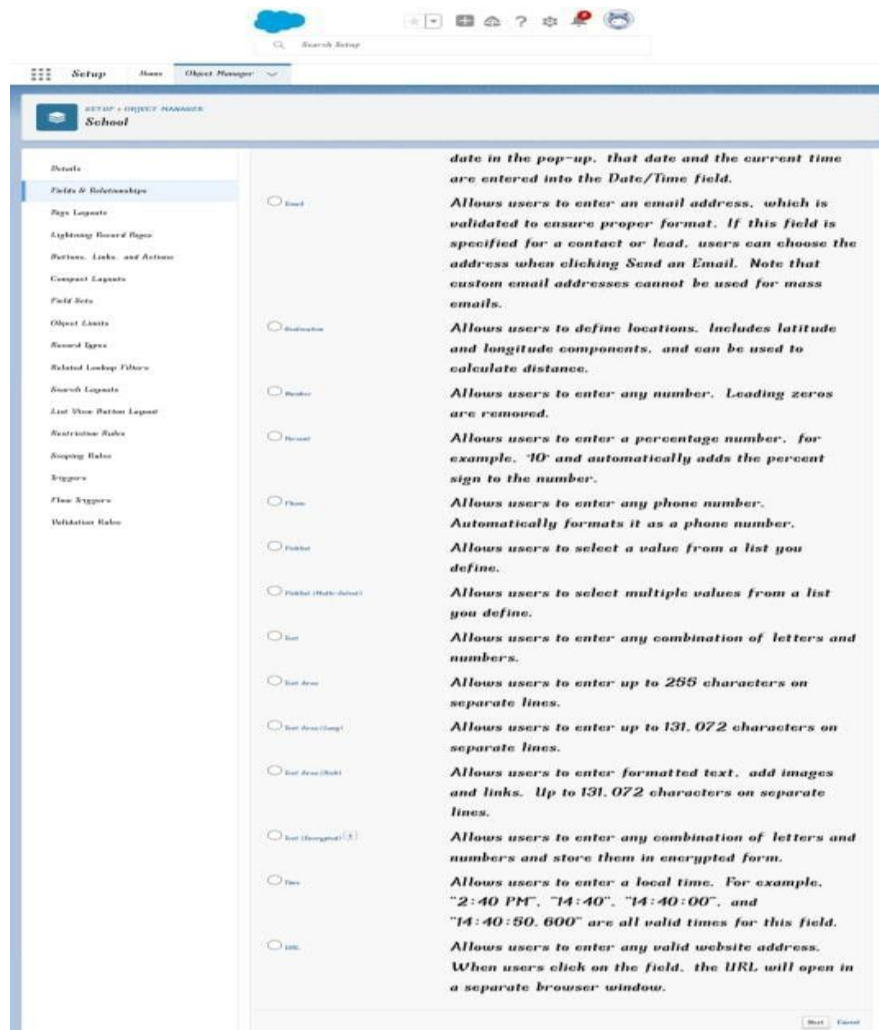
ACTIVITY: Create the School Management App



From this select the app manager in quick find and click new lightning app and enter the app name as School, Students, Parents, Reports and Dashboard and click save and finish .

MILESTONE 4: FIELDS AND RELATIONSHIP :

ACTIVITY 1: Creation of fields for the school object



From this select school object in the object manager and select field and relationship then click new. Now to create the customer field, from data types select text area and enter address for the field label then click save and new. Same procedure to create text area with district, state and school as a field label. To create phone number as field label from phone as a data type.

Search Setup

Setup Home Object Manager

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Profiles, Roles, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Buttons Layout

Restriction Rules

Grouping Rules

Triggers

Flow Triggers

Validation Rules

School

New Custom Field

Step 1: Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☒ New Selected **Select one of the data types below.**

☐ Auto Number **A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.**

☐ Formula **A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.**

☐ Roll-Up Summary **A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.**

☐ Lookup Relationship **Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.**

☐ Master-Detail Relationship **Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:**


- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.








The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.


☐ External Lookup Relationship **Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.**

☐ Checkbox **Allows users to select a True (checked) or False (unchecked) value.**

Next to create roll up summary field as data type to calculate the number of students and highest mark as a field label.














Setup

Home

Object Manager



SETUP & OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Board Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Sharing Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

Address

Created By

District

Highest Marks

Last Modified By

Number of students

Owner

Phone Number

School Name

School websites

State

Fields & Relationships

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

0 Items. Sorted by First Name.

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 Students)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Students)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School websites	School_websites__c	Text Area(255)		
State	State__c	Text Area(255)		

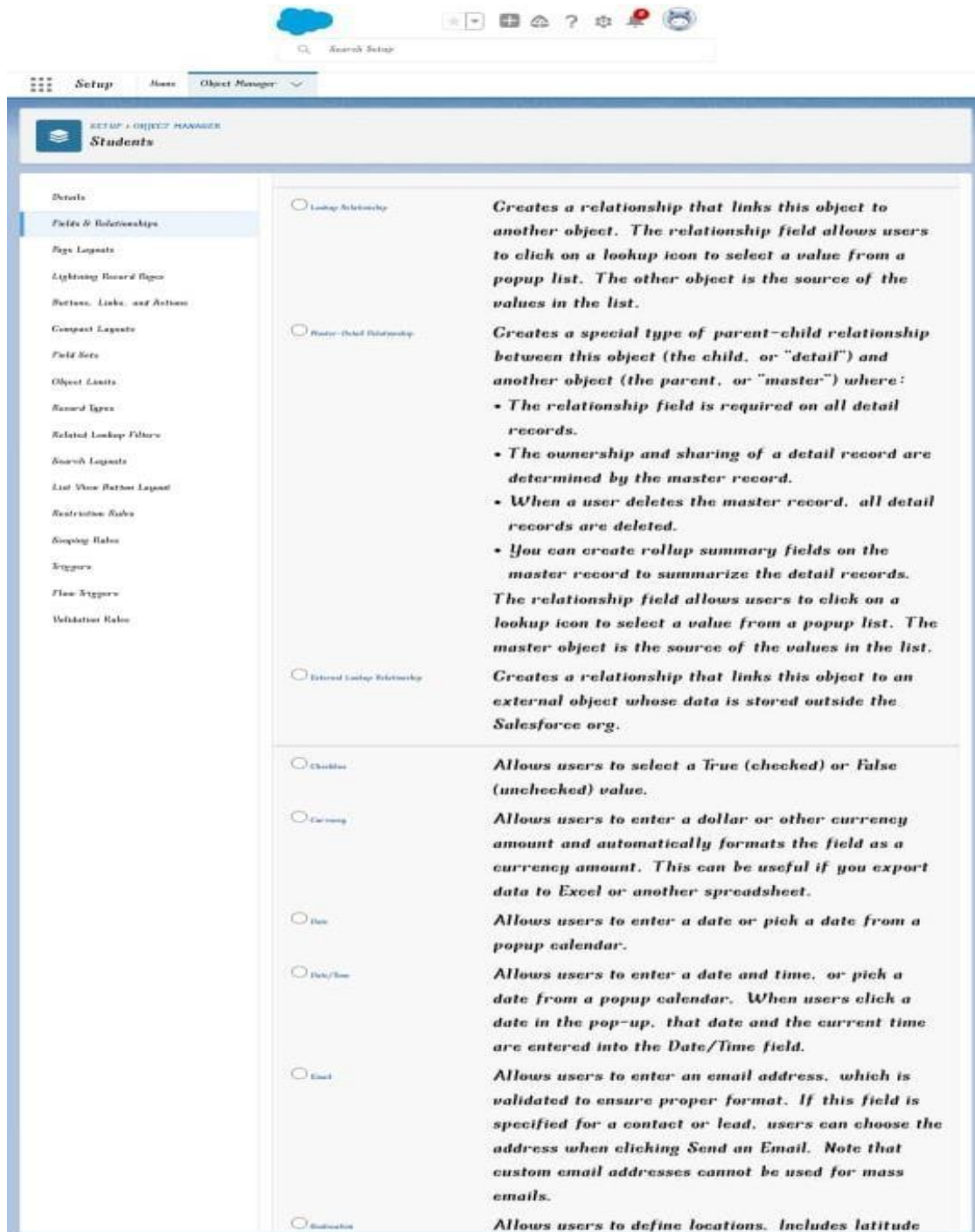
Finally after finishing the field and relationship process the school object will be displayed like this.

ACTIVITY 2: Creation of the fields for the student object

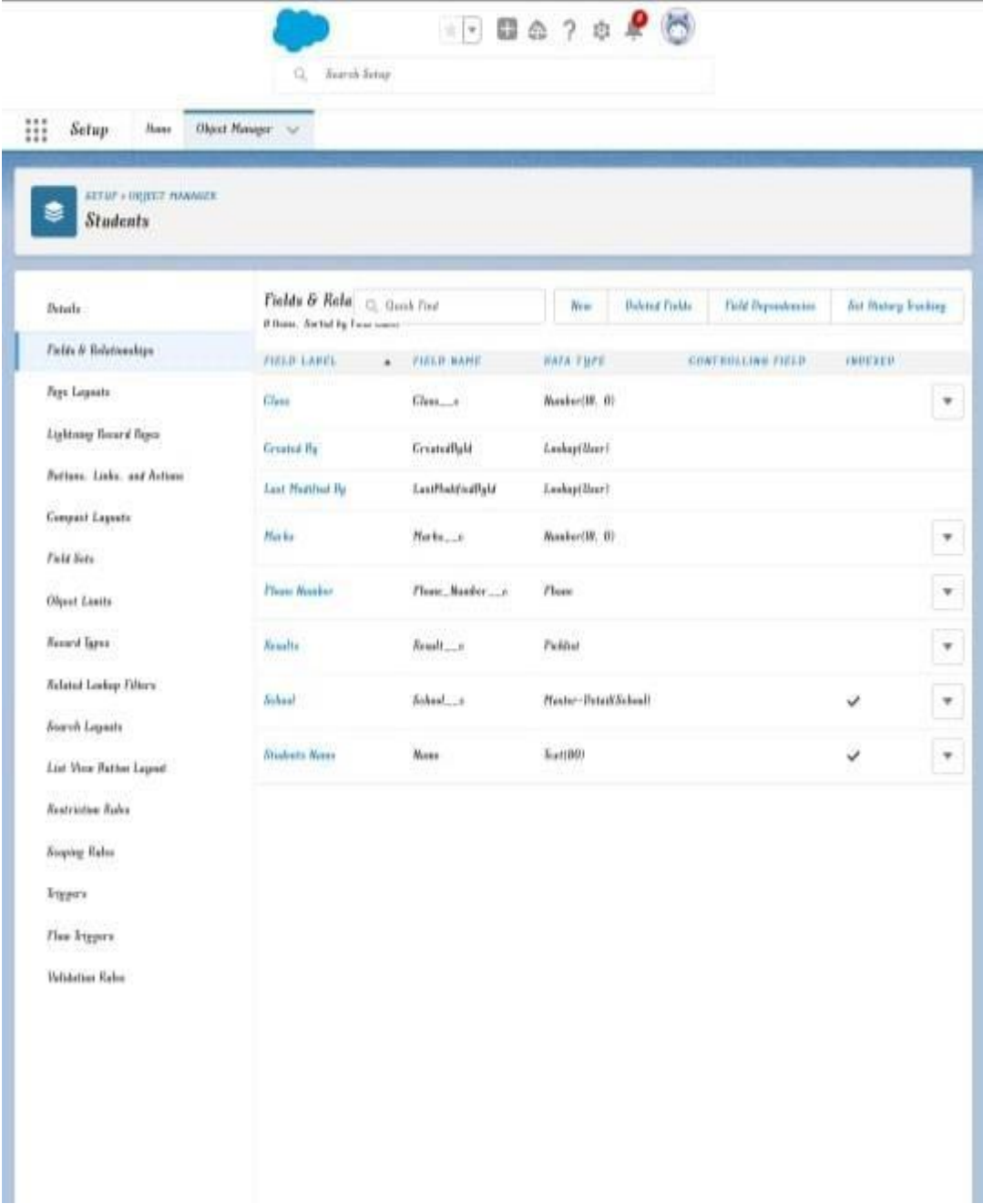
The screenshot shows the Salesforce Setup interface for the 'Students' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Buttons Layout, Restrictions Rules, Grouping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'SETUP > OBJECT MANAGER > Students' and displays a list of field data types with radio button selection options. Each option is accompanied by a descriptive text block explaining its functionality.

Field Data Type	Description
<input type="radio"/> Email	date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
<input type="radio"/> Location	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

To create phone number as a field label from phone as a data type and to create results as a from the picklist data type.



To create master detail relationship data type for student object. In number field data type, to create the class and marks as a field label.



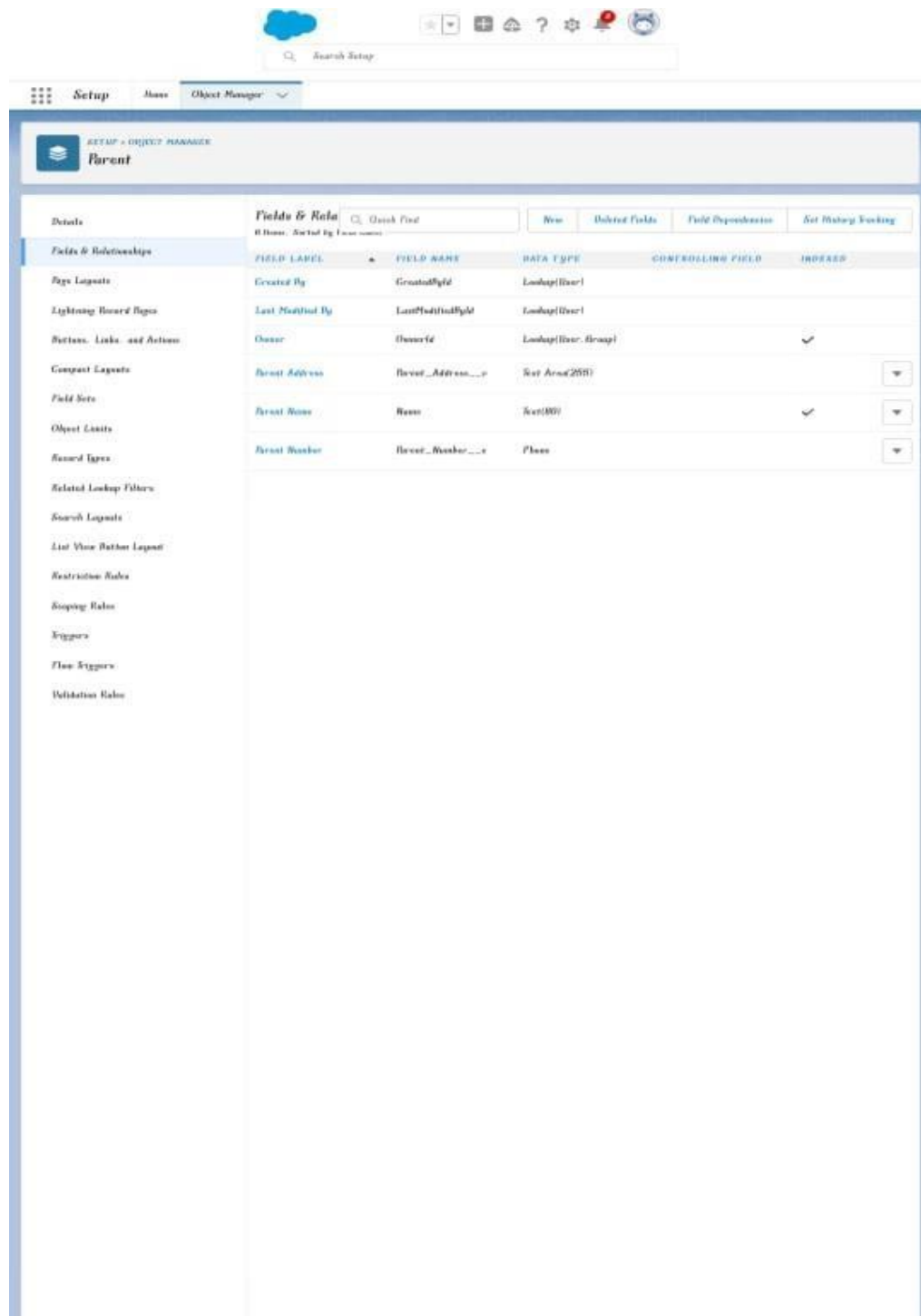
After finishing the process, the student object will be displayed like this.

ACTIVITY 3: creation of the field for the parent object

The screenshot shows the Salesforce Setup - Object Manager interface for the 'Parent' object. The 'Fields & Relationships' tab is selected. The left sidebar lists various field types, and the main area displays their descriptions.

Field Type	Description
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
<input type="radio"/> Location	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

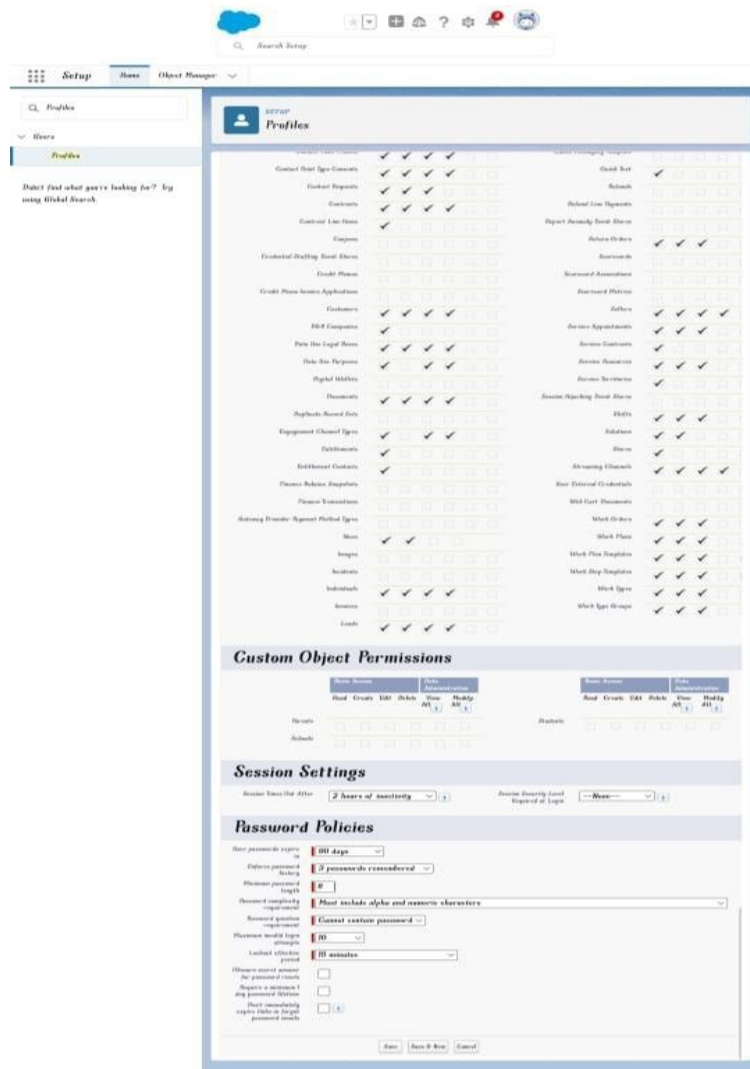
To create parent address in text area and data type and then enter phone number in phone data type .



After that parent object will be displayed like this.

MILESTONE 5: PROFILE :

ACTIVITY: Creation on profile



From this select profiles in quick find and find standard user from list of profile then to click clone and give view all access permission for parent profiles .

MILESTONE 6: USERS :

ACTIVITY: creating a users

The screenshot shows the 'Users' form in a software application. The form is divided into several sections:

- Basic Information:** Includes fields for Username, Password, Email, and Role.
- Permissions:** Includes checkboxes for various roles like Marketing User, Offline User, Knowledge User, etc.
- Address:** Includes fields for Street, City, Zip/Postal Code, State/Province, and Country.
- Language:** Includes dropdowns for Time Zone, Locale, and Language.
- Appearance:** Includes fields for Display Name and a checkbox for 'Generate new password and notify user immediately'.

Select users in quick find and click new users and enter the username as parents and enter all the detail given in a procedure pdf. By the same procedure, to enter username as teacher and principal also.

Milestone 7: PERMISSION SET :

ACTIVITY: Permission sets 1

The screenshot displays the 'Permission Sets' configuration page in a learning management system. The interface includes a top navigation bar with a search bar and various utility icons. A left sidebar contains a 'Permissions' menu with sub-options like 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main panel is titled 'SETUP Permission Sets' and features a 'Create' button. Below the button, a form is provided for entering permission set details, including fields for 'Label', 'API Name', and 'Description'. A checkbox for 'Revision Activation Required' is also present. A section titled 'Who will use this permission set?' offers guidance on selecting a license type from a dropdown menu, with a 'Learn more here' link. The bottom of the form includes 'Save' and 'Cancel' buttons.

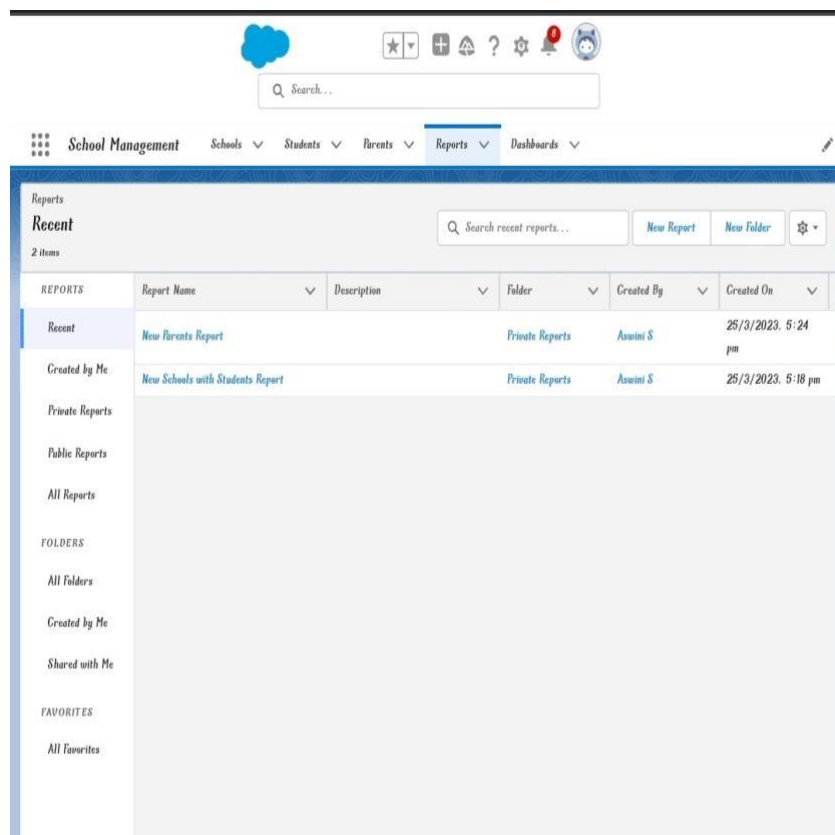
Select the permission sets in quick find then click new and enter name as teacher permission and then under object settings give edit permission and view create to all custom object in teacher user .

ACTIVITY 2: Permission sets 2

By same way , to create principal permission and edit all permission for the custom object in principal user.

MILE STONE 8 : REPORTS:

ACTIVITY: To create Reports



From the report tab then select the report type as school with students and parents for the reports and click create and customizing the report then click save & run it.

4. TRAIHEAD PROFILE PUBLIC URL:

- TEAM LEAD: <https://trailblazer.me/id/aswis24>**
- TEAM MEMBER 1: <https://trailblazer.me/id/abits9>**
- TEAM MEMBER 2: <https://trailblazer.me/id/abanujv>**
- TEAM MEMBER 3: trailblazer.me/id/bepsiba**

5 ADVANTAGE AND DISADVANTAGES:

ADVANTAGES

- Customizable software that provides end to end functionality.**
- Tools for an automated and online process .**
- Available E-Book for all subjects .**

DISADVANTAGES

- Lack of server to view results .**
- Solid security features for data's .**
- Reporting capability is limited .**

6 APPLICATIONS:

- Used for all school and colleges.**
- Online admission process is applicable during pandemic period.**
- Online method E-books applied for differently abled students.**

7 CONCLUSION:

This project is to maintain and manage the school related problems which further can be modified based on the requirements.

In this project we have learnt how to create a developer account and login into salesforce

- Creation of object for school management, object for student and parents.**
- Creation of fields for school, student and parent object.**
- How to set profile, users, permission sets and reports.**

8. FUTURE SCOPE:

- In future CRM will be used in all schools.**
- It will be very useful during online admission.**
- It provides solid security for data's.**
- The future of CRM includes users who demand more functionality.**

----- THANK YOU-----