

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.

Ideation and Brainstorming Map

Untitled mural • A CRM APPLICATI

app.mural.co/t/acrmapplicationforschoolcoll2707/m/acrmapplicationforschoolcoll2707/1681971720475/dfc3f80e9afdb420fd9a67c1c02a731d53f521a6?sender=ud...

You've reached the maximum number of murals. Upgrade your free plan for unlimited murals. Upgrade

Untitled mural

Form prioritization

Before you collaborate

Define your problem statement

Brainstorm

Group ideas

Prototype

Form prioritization

Before you collaborate

Define your problem statement

Brainstorm

Group ideas

Prototype

Outline

3 Define your probl...

4 Brainstorm

9%

Type here to search

ENG

12:45 PM

24-04-2023

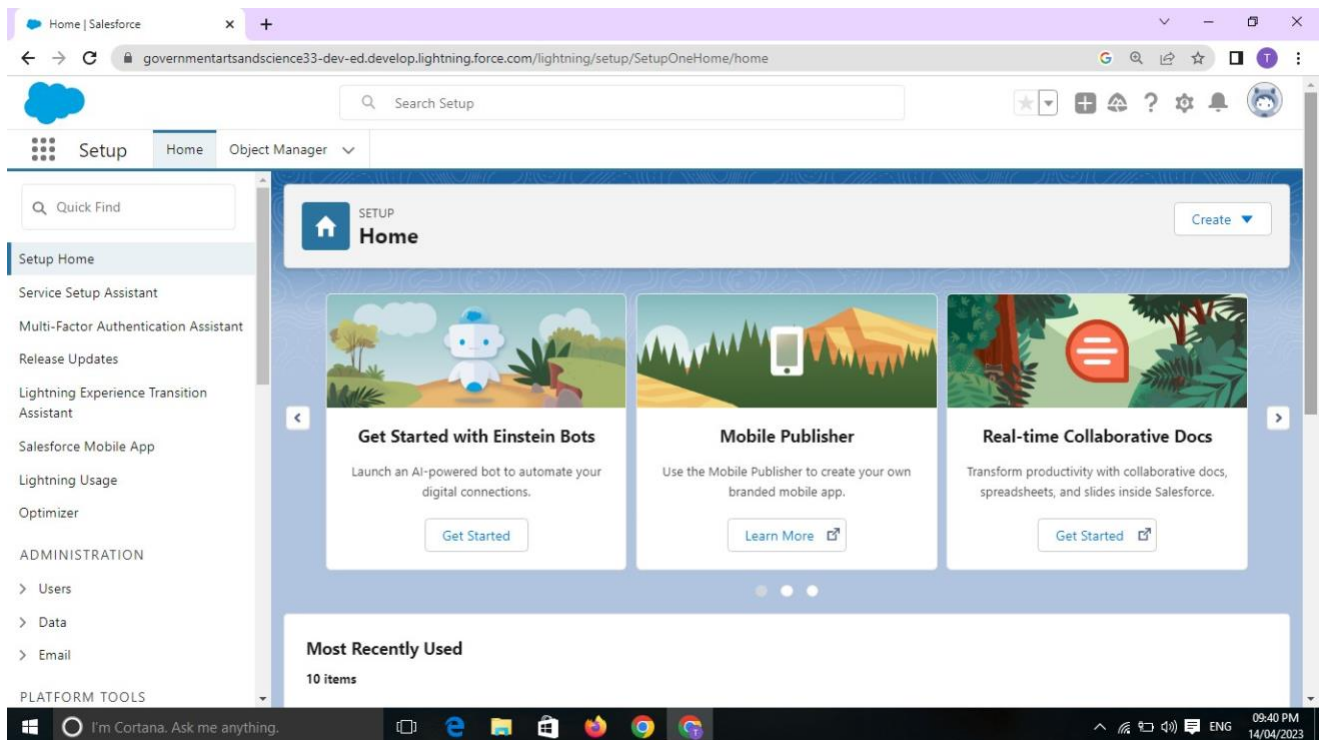
3. Result

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

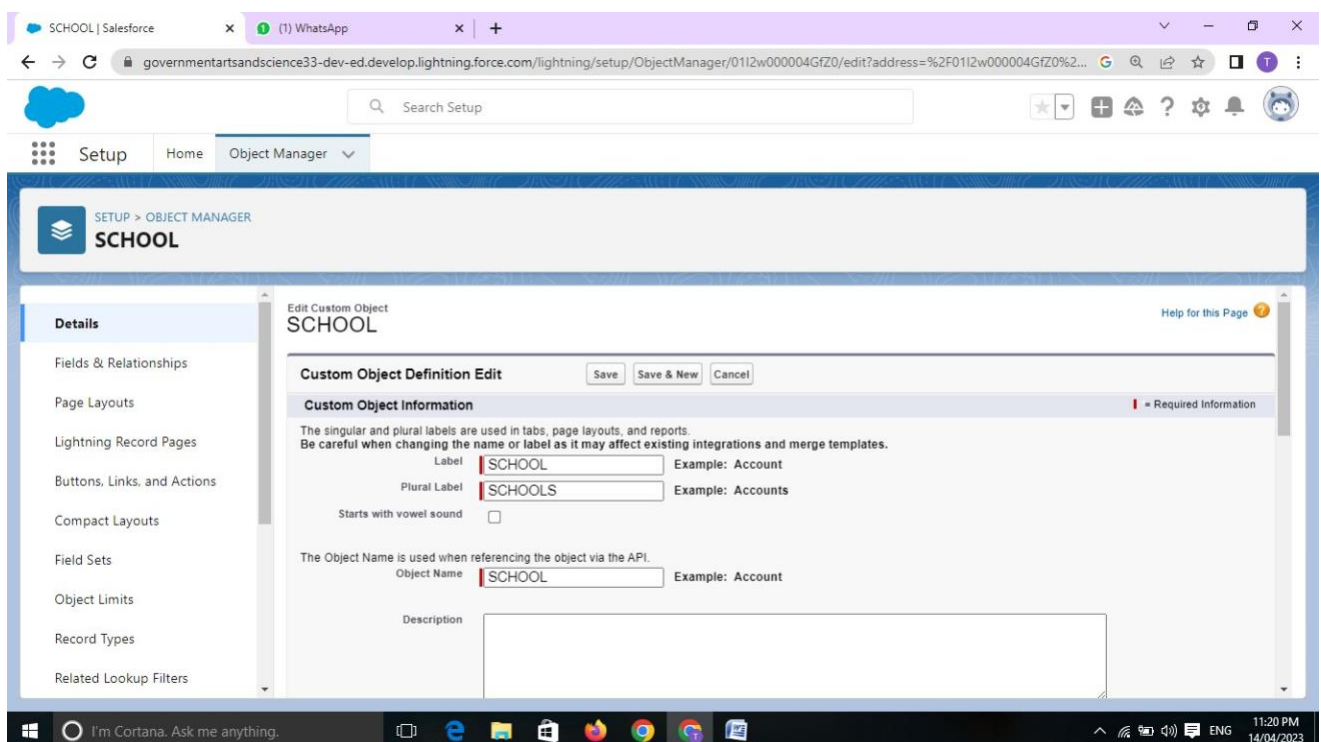
Activity and Screenshot

Milestone -1: Salesforce



Milestone-2: Object

Activity -1: Creation of School Object:



Activity – 2: Creation of Student Object:

student | Salesforce

governmentartsandsience33-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004GfrO/edit?address=%2F0112w000004GfrO%2F...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
student

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Edit Custom Object
student

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

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

Help for this Page

I'm Cortana. Ask me anything.

11:26 PM 14/04/2023

Activity -3: Creation of Parent Object:

parent | Salesforce

governmentartsandsience33-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gfrx/edit?address=%2F0112w000004Gfrx%2F...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
parent

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Edit Custom Object
parent

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

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

Help for this Page

I'm Cortana. Ask me anything.

11:28 PM 14/04/2023

Creat tabs:

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar displays `atoanything-f.lightning.force.com/lightning/setup/CustomTabs/home`. The page header includes navigation links like "Get Started", "Check Out Top Features", and a "Subscribe Now" button. The left sidebar shows the "Setup" menu with "Home" and "Object Manager" options. The main content area is titled "Custom Tabs" and provides instructions on creating custom tabs. It lists four categories: Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs. The Custom Object Tabs section shows a table with three entries: "Blank", "Car", and "Books".

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	parents	Blank	
Edit Del	schools	Car	
Edit Del	students	Books	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Milestone-3: Lightning App

App Manager | Salesforce

governmentartsandsience33-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		21/03/2023, 10:38 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashb...	21/03/2023, 10:38 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	21/03/2023, 10:38 am	Classic	✓

Milestone -4 Fields and Relationships

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

SCHOOL | Salesforce

governmentartsandsience33-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004GfZ0/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SCHOOL

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

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
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (COUNT 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_del__c	Phone		

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

The screenshot shows the Salesforce Setup interface for the 'student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. The table below lists the fields:

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)		
Results	Results__c	Picklist		
SCHOOL	SCHOOL__c	Master-Detail(SCHOOL)		✓
student Name	Name	Text(80)		✓

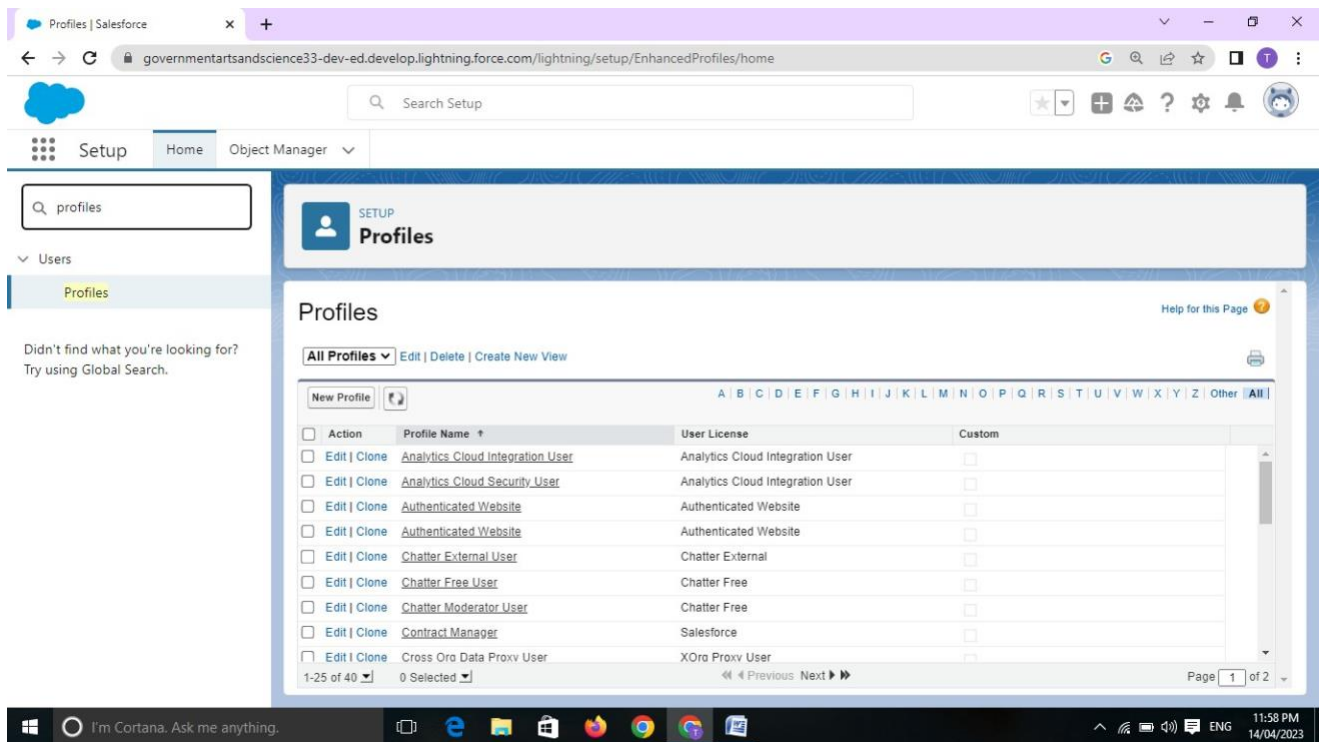
Activity -3: Creation of fields for the Parent objects:

The screenshot shows the Salesforce Setup interface for the 'parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. The table below lists the fields:

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: Profile

Activity : Creation on Profile :

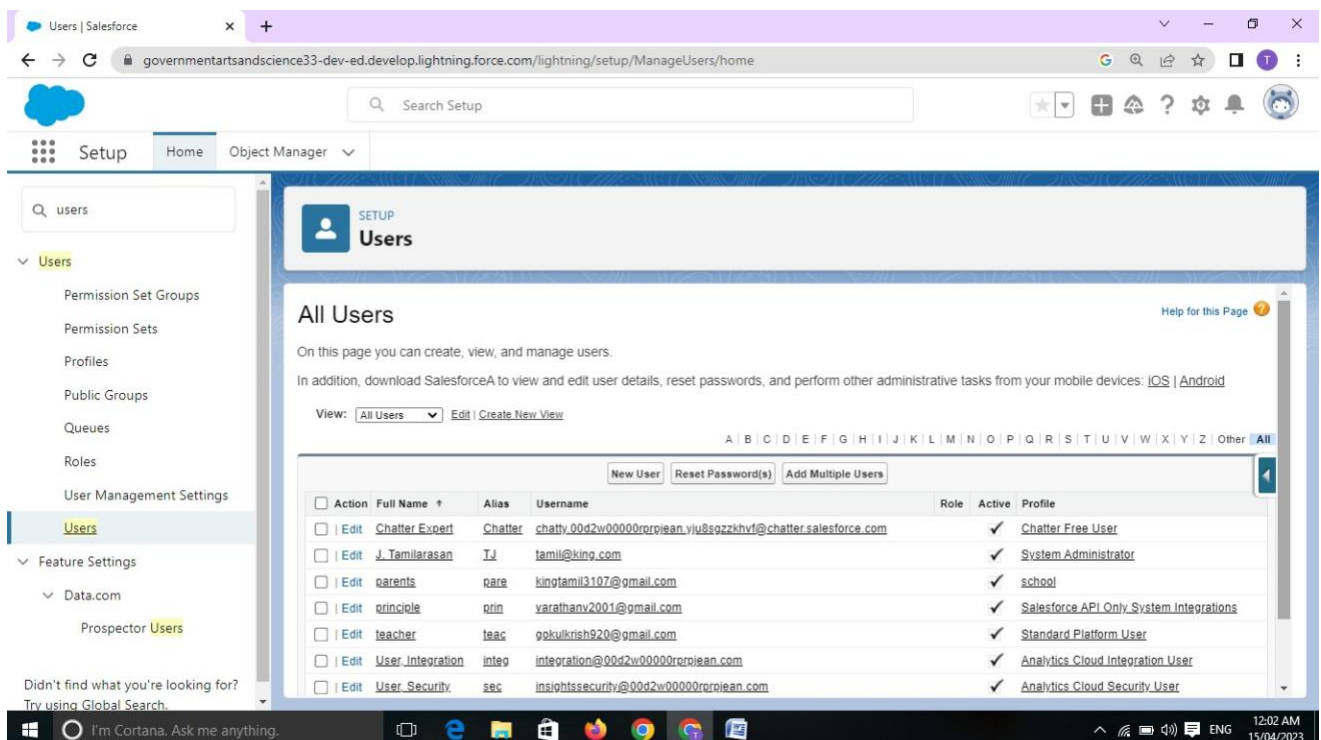


The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profiles' and a list of navigation items: Users, Profiles (selected), and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Profiles' and displays a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'All Profiles' view is selected, showing a list of profiles including Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, and Cross Oro Data Proxy User. The table is paginated, showing 1-25 of 40 profiles.

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Oro Data Proxy User	XOro Proxy User	<input type="checkbox"/>

Milestone -6: Users

Activity : Creating a Users



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'users' and a list of navigation items: Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The main content area is titled 'SETUP Users' and displays a table of users. The 'All Users' view is selected, showing a list of users including Chatter Expert, J. Tamilarasan, parents, orinciole, teacher, User Integration, and User Security. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table is paginated, showing 1-25 of 40 users.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000r0rpean.vju8sozzkhv1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	J. Tamilarasan	T.J.	tamil@king.com		<input checked="" type="checkbox"/>	System Administrator
Edit	parents	pare	kingtamil3107@gmail.com		<input checked="" type="checkbox"/>	school
Edit	orinciole	orin	varathanv2001@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
Edit	teacher	teac	gokulkrish920@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	User Integration	intep	integration@00d2w00000r0rpean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000r0rpean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone -7: Permission sets

Activity -1: Permission sets 1:

The screenshot shows the Salesforce Setup interface for a permission set named 'Teacher permission'. The left sidebar contains a search bar with 'permission sets' and a list of users. The main content area displays the 'Permission Set Overview' for 'Teacher permission'. The overview table includes the following information:

Permission Set Overview	
Description	API Name: Teachet_permission
License	Namespace Prefix
Session Activation Required <input checked="" type="checkbox"/>	Created By: Tamilarasan J. 08/04/2023, 12:29 pm
Last Modified By: Tamilarasan J. 08/04/2023, 12:32 pm	

Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'. The 'Assigned Apps' section is currently empty.

Activity -2: Permission sets 2 :

The screenshot shows the Salesforce Setup interface for a permission set named 'principle permission'. The left sidebar contains a search bar with 'permission sets' and a list of users. The main content area displays the 'Permission Set Overview' for 'principle permission'. The overview table includes the following information:

Permission Set Overview	
Description	API Name: principle_permission
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By: Tamilarasan J. 08/04/2023, 12:50 pm
Last Modified By: Tamilarasan J. 08/04/2023, 12:50 pm	

Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'. The 'Assigned Apps' section is currently empty.

Milestone -8: Reports

Activity -1: School and

students Report :

The screenshot displays the Salesforce Report Builder interface in a web browser. The browser's address bar shows the URL: `https://vimalraj2-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000D9RhSEAV/edit`. The Salesforce navigation bar at the top includes the 'Reports' tab, which is currently selected. Below the navigation bar, the report title 'New schools with students Report' is visible, along with a 'schools with students' filter. The main content area shows a preview of the report with the message: 'No records returned. Try editing report filters:'. Below this message, there are two links: 'Show All schools.' and 'Edit other filters in the filter panel.' The left sidebar contains the 'Outline' section with 'Groups' and 'Columns' tabs. The 'Columns' tab is active, showing a list of columns: 'school: school Name' and 'student: student Name'. The bottom of the screen shows the Windows taskbar with the search bar and several application icons.

Activity -3: Parents Report :

The screenshot displays the Salesforce Report Builder interface. The browser address bar shows the URL: <https://vimalraj2-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000D9RhCEAF/edit>. The report is titled "New parents Report" and is currently in edit mode. The filter panel shows "parent: parent Name". The preview area indicates "No records returned. Try editing report filters." and provides links to "Show All parents" and "Edit other filters in the filter panel." The sidebar on the left contains an "Outline" section with "GROUP ROWS" and "Add group..." button, and a "Columns" section with "Add column..." button and "parent: parent Name" selected. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

4. Trailhead Profile Public URL :

Team Leader : Melque Geoge fernandes. A

<https://trailblazer.me/id/mferna>
[ndes123](https://trailblazer.me/id/mferna)

Team Member :

Nandhini. A

[https://trailblazer.m](https://trailblazer.me/id/narivazhagan1)
[e/id/narivazhagan1](https://trailblazer.me/id/narivazhagan1)

Team Member : Pandiyan. C

<https://trailblazer.me/id/pandc3>

Team Member: Praveen kumar.P

<https://trailblazer.me/id/ppraveen84>

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 interest connectivity is another major issue that needs to be addressed.
- ✓ It is not actually a disadvantages 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

