

A CRM APPLICATION FOR SCHOOLS\COLLEGES

1.INTRODUCTION:

1.1 Overview:

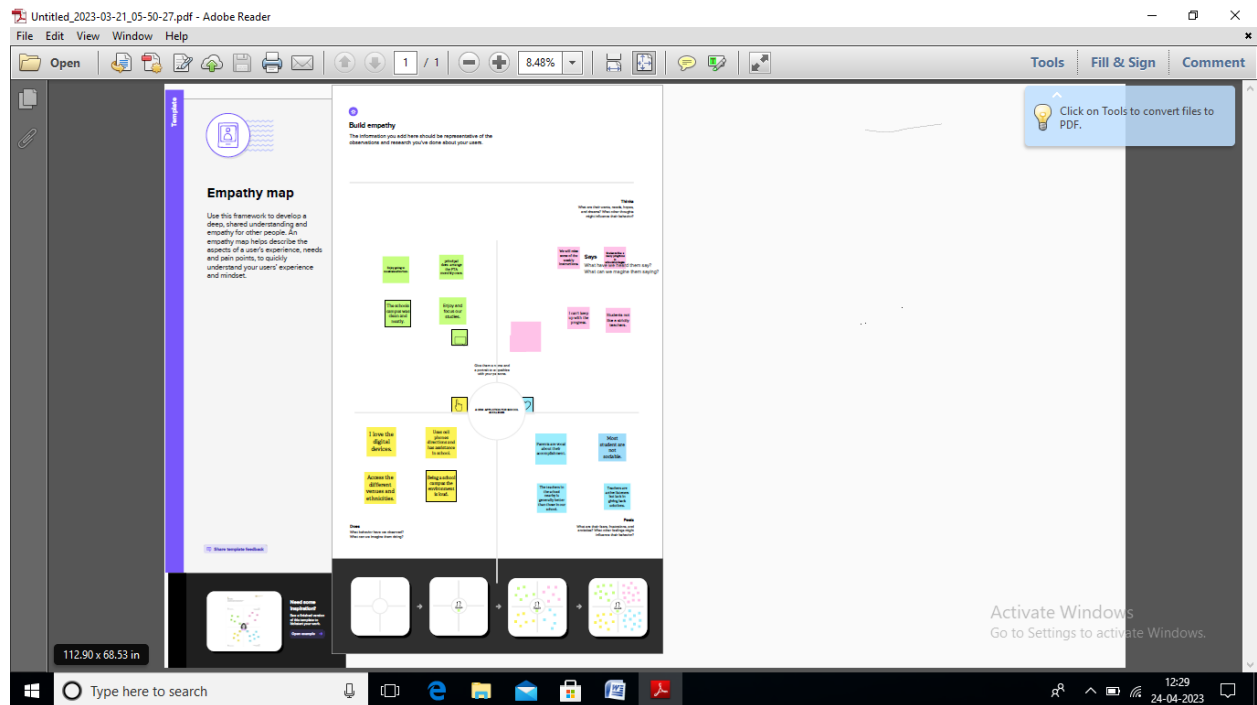
Customer Relationship Management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.

1.2 Purpose:

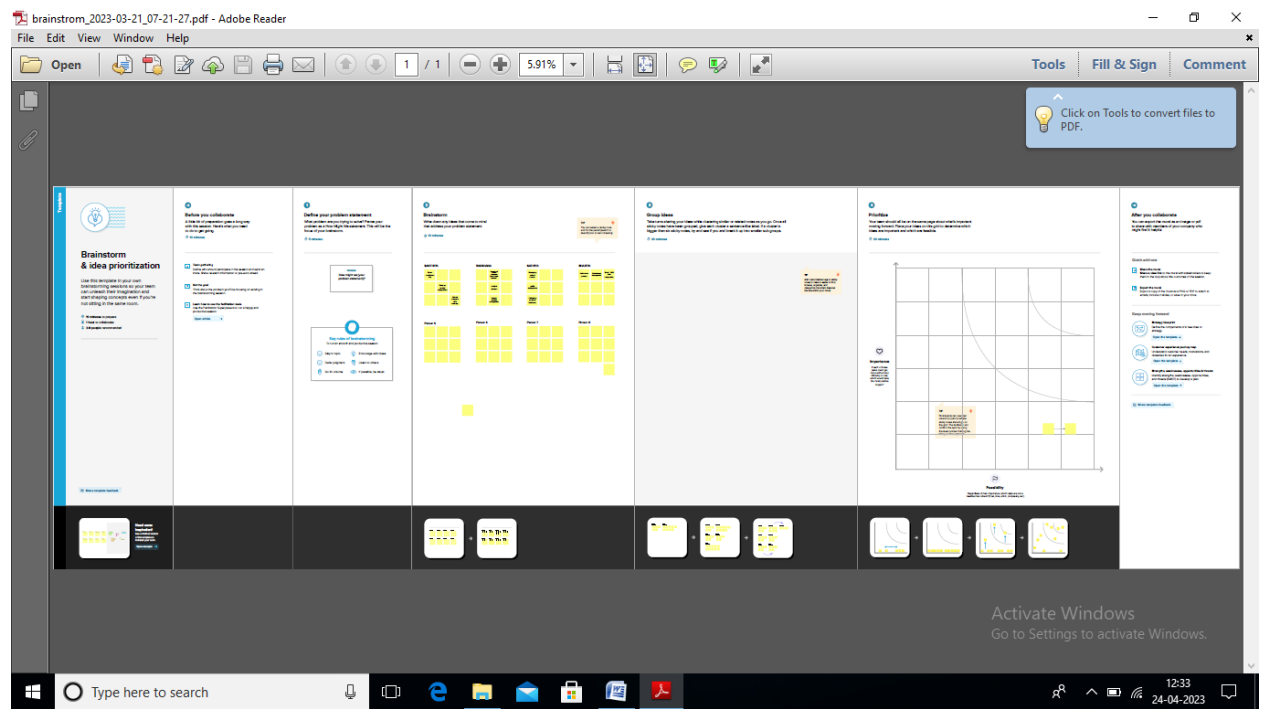
A CRM system can help educational organizations effectively manage and track leads resulting in improved enrolment numbers. Additionally by personalizing communication and providing automated follow-up educational organization can build better relationships with students and leads and keep them engaged over time.

2.Problem Definition & Design Thinking:

2.1 Empathy Map:



2.2 Ideation & Brainstroming Map:



3. RESULT

3.1 Data Model:

Object	Fields in the object	
Obj1	Field label	Data type
	Address, District, State, School.	Text area
	Phone number	Phone

Obj2	Field label	Data type
	Number of Students, Highest Marks.	Roll-up summary
	Results	Pick list

3.2 Activity & Screenshot:

school | Salesforce

governmentartscollegeforw40-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048QGo/Details/view

Search Setup

Setup Home Object Manager

SETUP > 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

Search Layouts

List View Button Layout

Details

Description

API Name school__c

Custom

Singular Label school

Plural Label schools

Enable Reports

Track Activities

Track Field History

Deployment Status Deployed

Help Settings Standard salesforce.com Help Window

Edit Delete

Activate Windows
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Permission Sets | Salesforce

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Search Setup

Setup Home Object Manager

SETUP

Permission Sets

Permission Set studentpermission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description

License

Session Activation Required

Last Modified By Rakshana Venkatesan 06/04/2023, 11:01 am

API Name studentpermission

Namespace Prefix

Created By Rakshana Venkatesan 06/04/2023, 11:01 am

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Activate Windows
Go to Settings to activate Windows.

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

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Optimizer

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Permission Set

teacher permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	teacher_permission
License	Namespace Prefix	
Session Activation Required	Created By	Rakshana Venkatesan 06/04/2023, 10:53 am
Last Modified By		Rakshana Venkatesan 06/04/2023, 10:53 am

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User

Parents Parents

Permission Set Assignments (2) | 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 (0) | User Provisioning Accounts (0)

User Detail

Edit Sharing Reset Password Freeze

Name	Parents Parents	Role	Salesforce
Alias	ppare	User License	Salesforce
Email	rakshana.kkv@gmail.com	Profile	School profile
Username	rakshana.kkv@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16807571561629153009	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	

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Permission Set

Principal permission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Principal_permission
License	Namespace Prefix	
Session Activation Required	Created By	Rakshana Venkatesan 06/04/2023, 1:51 pm
Last Modified By		Rakshana Venkatesan 06/04/2023, 1:51 pm

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Profiles | Salesforce

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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
User License	Salesforce
Description	Custom Profile
Created By	Rakshana Venkatesan 05/04/2023, 1:01 pm
Modified By	Rakshana Venkatesan 05/04/2023, 1:03 pm

Page Layouts

Global	Global Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Home Page Layout	DE Default (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Account	Account Layout	Opportunity Product	Opportunity Product Layout

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Enable App Cloning Disabled

22 items • Sorted by App Name • Filtered by All appmenutems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
1	All Tabs	AllTabSet		10/03/2023, 2:45 pm	Classic		
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/03/2023, 2:45 pm	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	10/03/2023, 2:45 pm	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	10/03/2023, 2:47 pm	Lightning	✓	
5	Community	Community	Salesforce CRM Communities	10/03/2023, 2:45 pm	Classic	✓	
6	Content	Content	Salesforce CRM Content	10/03/2023, 2:45 pm	Classic	✓	
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage...	10/03/2023, 2:45 pm	Lightning	✓	
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/03/2023, 2:45 pm	Lightning	✓	
9	Lightning Usage App	Lightninginstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/03/2023, 2:45 pm	Lightning	✓	
10	Marketing	Marketing	Best-in-class on-demand marketing automation	10/03/2023, 2:45 pm	Classic	✓	
11	Platform	Platform	The fundamental Lightning Platform	10/03/2023, 2:45 pm	Classic	✓	

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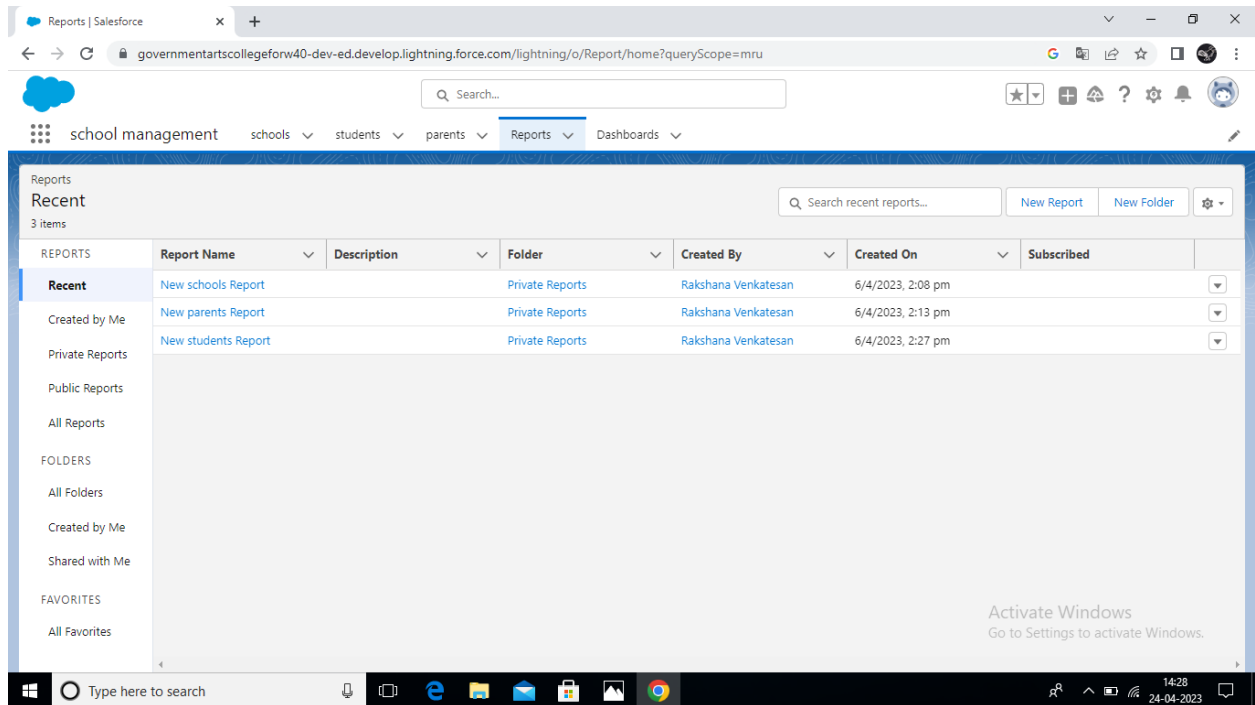
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4. TRAILHEAD PROFILE PUBLIC URL

Team lead -<https://trailblazer.me/id/rvenkatesan21>

Team Member 1 -<https://trailblazer.me/id/santr49>

Team Member 2 -<http://trailblazer.me/id/ssathiya18>

Team Member 3 -<https://trailblazer.me/id/shazz12>

5. ADVANTAGES & DISADVANTAGES

ADVANTAGE:

- Ultimate Accessibility
- Increased revenue
- Greater customer satisfaction

- Simple account planning
- Trusted reporting
- Improved team collaboration

DISADVANTAGES:

- Staff over-reliance on CRM may diminish customer loyalty through a bad experience.
- Security concerns associated with centralized data
- The excess initial time and productivity cost of implementation.
- It requires a process-driven sales organization.
- It may not suit every business.

APPLICATIONS:

Customer Relationship Management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple improve business relationships. A CRM system helps companies stay connected to customers streamline processes and improve profitability.

CONCLUSION:

Our conclusion is that in order to improve the performance of CRM an organization should choose a CRM technology that suits with organization strategy and practice as well as employees technology and service capabilities.

FUTURE SCOPE:

Customer Relationship Management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers.