

# Project Report Template

## 1 INTRODUCTION

### 1.1 Overview

- CRM software manages all your institutions interactions with prospective and current students.
- It also supports managing communications with alumni, employees,, and other members of the education sector in your institution.
- CRM systems increases the number of leads coming in, helping your marketing team find new customers faster.

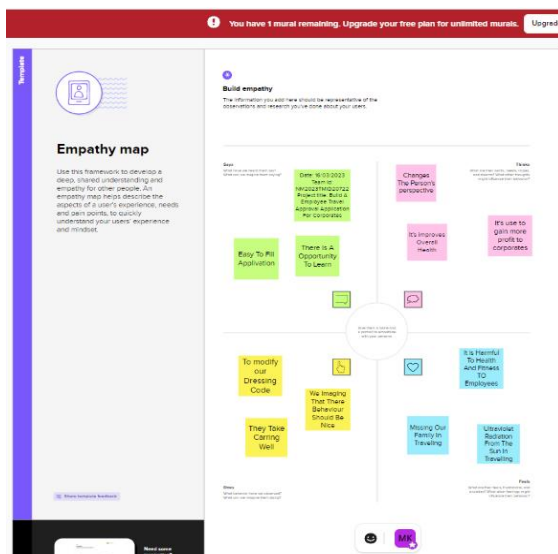
### 1.2 Purpose

CRM for educational institutions

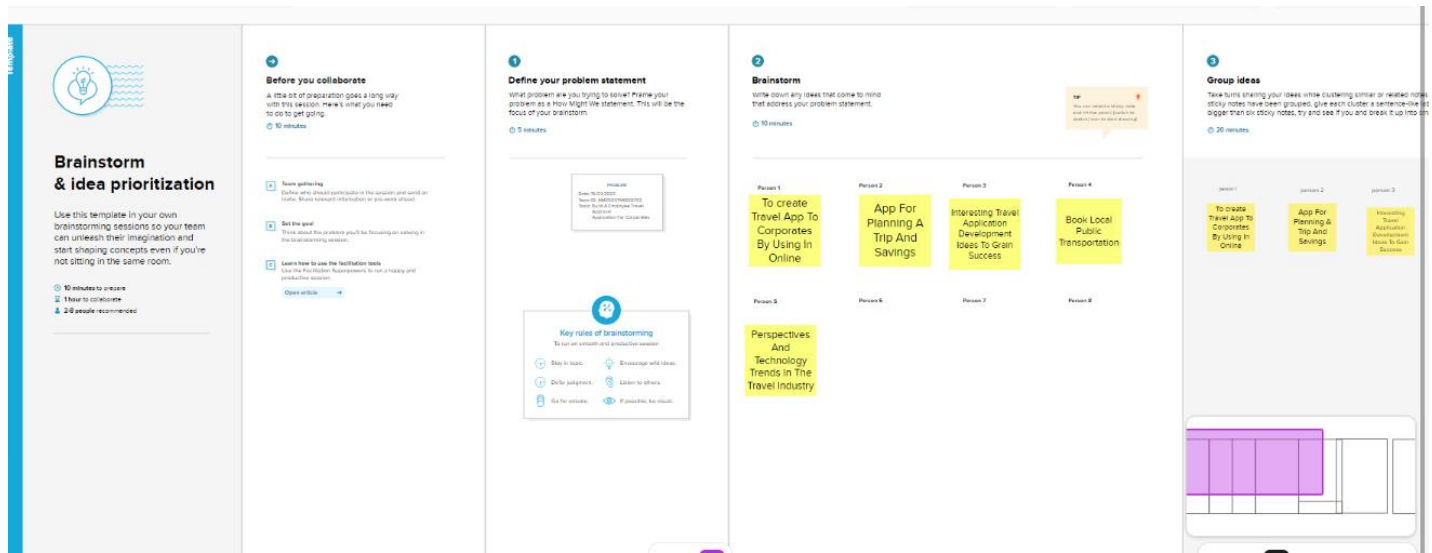
- It is easier to make follow up for all inquiries
- Keeping proper record of the interactions with student during counselling process.
- Centralised database of information
- Managed communications with prospective leads

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



### 2.2 & Ideation Brainstorming Map



### 3 Result

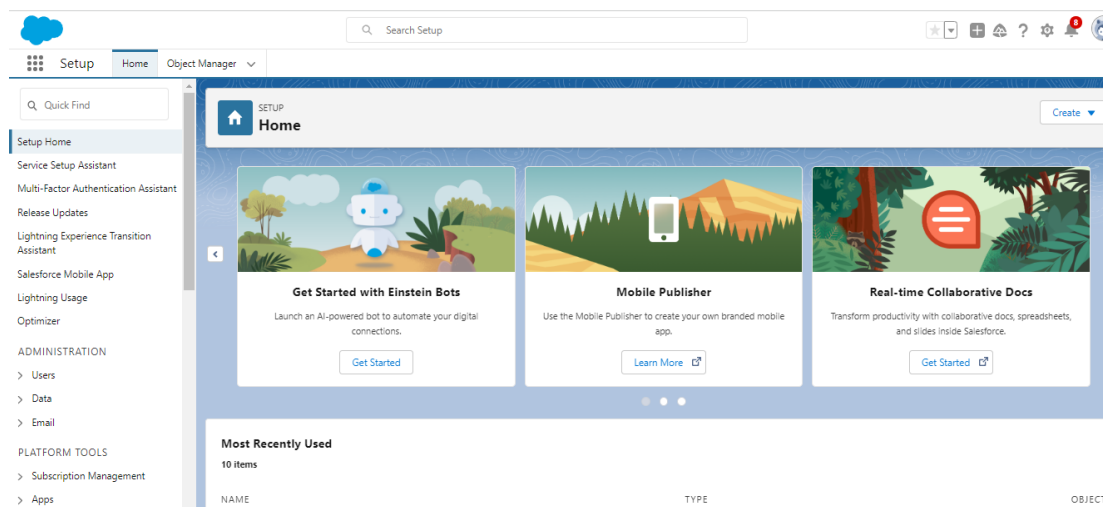
#### 3.1 Data Model:

Object name	Fields in the Object	
School	Field label	Date type
	Address	Text area
	Phone number	phone
	Number of students	Master- Detail relationship
	Highest Marks	Master-Detail relationship
Student	Field label	Data type
	Phone number	Phone
	School	Master-Detail relationship
	Results	Picklist
	Class	Number

Object name	Fields in the Object
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Parent	Field label	Data type
	Parent Address	Text area
	Phone number	Phone

### 3.2 Activity & Screenshot



MILESTONE - 2

Setup Home Object Manager

Search Setup

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

Didn't find what you're looking for? Try using Global Search.

### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs** [New](#) [About this Tab](#)

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Analytics_Maps	Highway Map	
<a href="#">Edit</a>   <a href="#">Del</a>	Analytics	Map Box	
<a href="#">Edit</a>   <a href="#">Del</a>	Analytics	Route	
<a href="#">Edit</a>   <a href="#">Del</a>	Analytics	Computer	
<a href="#">Edit</a>   <a href="#">Del</a>	Analytics	Chp	

**Web Tabs** [New](#) [About this Tab](#)

No Web Tabs have been defined.

## MILESTONE -3

Setup Home Object Manager

Search Setup

Q 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

Salesforce

Salesforce Branding

Enable App Cloning ☐ Disabled

22 Items • Sorted by App Name • Filtered by All appnames/items • TabSet Type

	App Name	Developer Name	Description	Last Modified D...	App ...	Vis...
1	All Tabs	AllTabSet		20/03/2023, 8:00 pm	Classic	✓
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	20/03/2023, 8:00 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	24/03/2023, 3:00 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	20/03/2023, 8:02 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	20/03/2023, 8:00 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	20/03/2023, 8:00 pm	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	20/03/2023, 8:00 pm	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	20/03/2023, 8:00 pm	Lightning	✓
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	20/03/2023, 8:00 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	20/03/2023, 8:00 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	20/03/2023, 8:00 pm	Classic	✓
12	Queue Management	QueueManagement	Create and manage queues for your business.	20/03/2023, 8:00 pm	Lightning	✓

MILESTONE -4

ACTIVITY-1

SetupHomeObject Manager

SEARCH SETUP

STARS

+

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⚙️

🔔

👤

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

Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Highest Marks	Highest_Marks__c	Master-Detail(Highest Marks)		✓
Last Modified By	LastModifiedById	Lookup(User)		
number of students	number_of_students__c	Master-Detail(uma school)		✓
Phone Number	Phone_Number__c	Phone		
school Name	Name	Text(80)		✓
school_cuddalore	school_cuddalore__c	Text Area(255)		
Tamilnadu	Tamilnadu__c	Text Area(255)		

ACTIVITY-2

SetupHomeObject Manager

SEARCH SETUP

STARS

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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

Search Layouts

List View Button Layout

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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(uma school)		✓
student Name	Name	Text(80)		✓

ACTIVITY-3

SetupHomeObject Manager

SEARCH SETUP

STARS

+

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⚙️

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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

Search Layouts

Fields & Relationships

6 Items, Sorted by Field Label

Q Quick Find

New

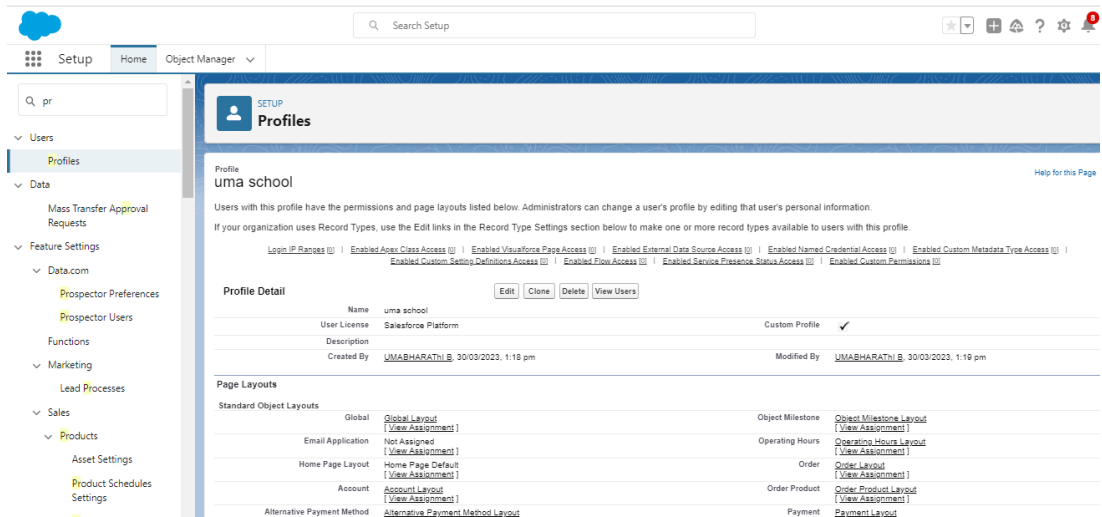
Deleted Fields

Field Dependencies

Set History Tracking

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**

Profile: **uma school**

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.

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

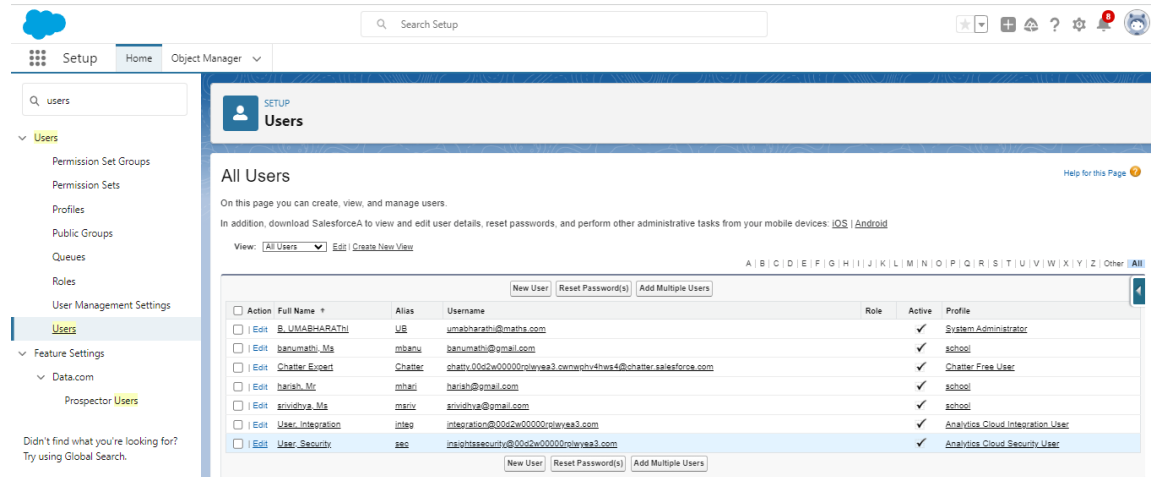
**Profile Detail**

Name	uma school	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description	Not Assigned		
Created By	UMABHARATHI B.	Modified By	UMABHARATHI B.
	30/03/2023, 1:18 pm		30/03/2023, 1:18 pm

**Page Layouts**

Standard Object Layouts	Global	Object Milestone
Global Layout	<a href="#">View Assignment</a>	Object Milestone Layout
Email Application	Not Assigned	Operating Hours Layout
Home Page Layout	Home Page Default	Order Layout
Account	Account Layout	Order Product Layout
Alternative Payment Method	Alternative Payment Method Layout	Payment Layout

## MILESTONE -6



**Users**

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New User](#)

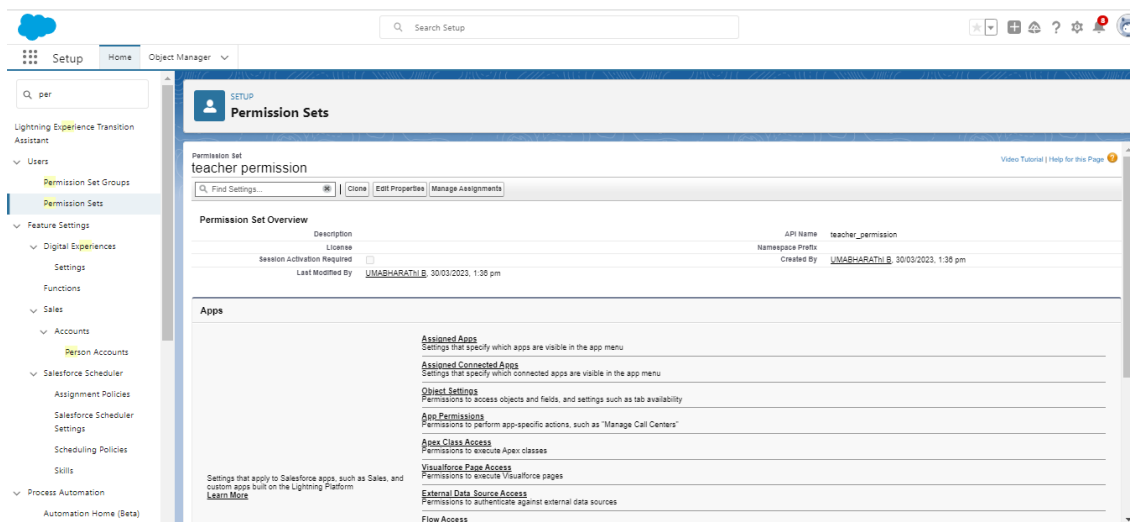
[New User](#) | 
 [Reset Password\(s\)](#) | 
 [Add Multiple Users](#)

Action	Full Name *	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	B. UMABHARATHI	UB	umabharathi@maths.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	banumathi Ma	mabanu	banumathi@gmail.com		<input checked="" type="checkbox"/>	school
<a href="#">Edit</a>	Chatter Evident	Chatter	chatty002wa00000rolvva3.commchv4ms4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	harish Mr	mharish	harish@gmail.com		<input checked="" type="checkbox"/>	school
<a href="#">Edit</a>	snudhya Ma	manu	snudhya@gmail.com		<input checked="" type="checkbox"/>	school
<a href="#">Edit</a>	User Integration	intev	integration0062w00000rolvva3.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	ase	insightsecurity0002w00000rolvva3.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) | 
 [Reset Password\(s\)](#) | 
 [Add Multiple Users](#)

## MILESTONE -7

### ACTIVITY-1



**Permission Sets**

Permission Set: **teacher\_permission**

[Find Settings...](#) | 
 [Clone](#) | 
 [Edit Properties](#) | 
 [Manage Assignments](#)

**Permission Set Overview**

Description	teacher_permission
License	
Session Activation Required	<input type="checkbox"/>
Created By	UMABHARATHI B.
Created	30/03/2023, 1:38 pm
Last Modified By	UMABHARATHI B.
Last Modified	30/03/2023, 1:38 pm

**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  
**Visualforce Page Access**  
 Permissions to execute Visualforce pages  
**External Data Source Access**  
 Permissions to authenticate against external data sources  
**Flow Access**

## ACTIVITY-2

## MILESTONE -8

Trailhead profile Public URL

Team Lead : UMABHARATHI B

<https://trailblazer.me/id/ubharathi5>

Team Member 1: VAISHNAVI P

<https://trailblazer.me/id/vvaishanvi29>

Team Member 2: VIJIPRIYA I

<https://trailblazer.me/id/v1617>

Team Member 3: VEERAMANI V

<https://trailblazer.me/id/veera12>

Team Member 4 : THAMIZHARASAN T

<https://trailblazer.me/id/ttamil28>

Team Member 5 : THANGAMANI S

<https://trailblazer.me/id/tmani80>

#### **4 ADVANTAGES & DISADVANTAGES CRM APPLICATION FOR SCHOOLS & COLLEGES**

##### **Advantages**

- One of the main benefits of using CRM in education is that automation and standardized online learning processes reduce costs by eliminating a lot of routine and manual steps.
- With the help of CRM for university technologies, you can get data on the effectiveness of each of your teachers and students.
- Integration of CRM systems for school with telephony, social networks, SMS notification, e-mail, different payment systems provides businesses with new opportunities to improve the efficiency of work with teachers and students in online colleges.

##### **Disadvantages**

- Staff over-reliance on CRM may diminish customer loyalty through a bad experience.
- It may not suit every business.

#### **5 APPLICATIONS**

- By intelligently storing and managing your customers information.
- A CRM system increases the number of leads coming.
- Helping your marketing team find new customers faster.

#### **6 CONCLUSION**



In this project, CRM enables a school to align its strategy with the needs of the student in order to best meet those needs and thus ensure student loyalty.

## **7 FUTURE SCOPE**

- CRM is one of the world's fastest-growing industries, expected to grow at a rate of 14% between 2021 and 2027.
- CRM for educational institutions is essential for the successful functioning of the organization.