

A CRM Application For School or College

1. Introduction

1.1.Overview:

A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

1.2.Purpose:

Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.

2. Problem Definition &Design Thinking

2.1. Empathy Map:

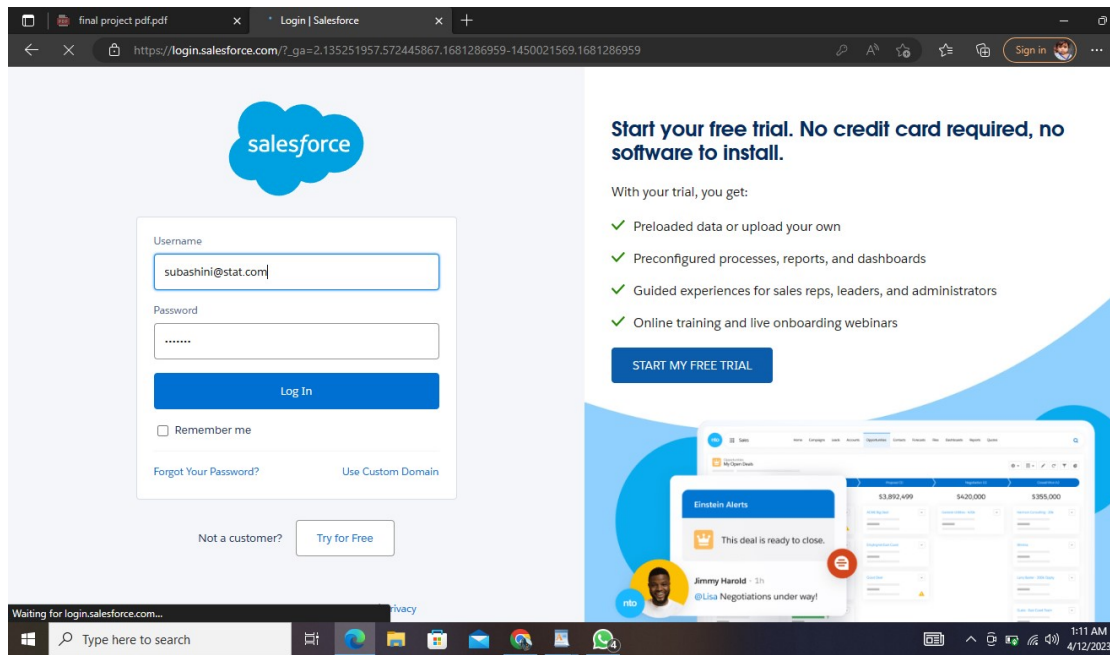
3. Result

3.1.Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
	Field label	Data Type
OBJECT 1	School	Rool summary
	Student	Phone
OBJECT 2	Field label	Data Type
	Parent	Text Area

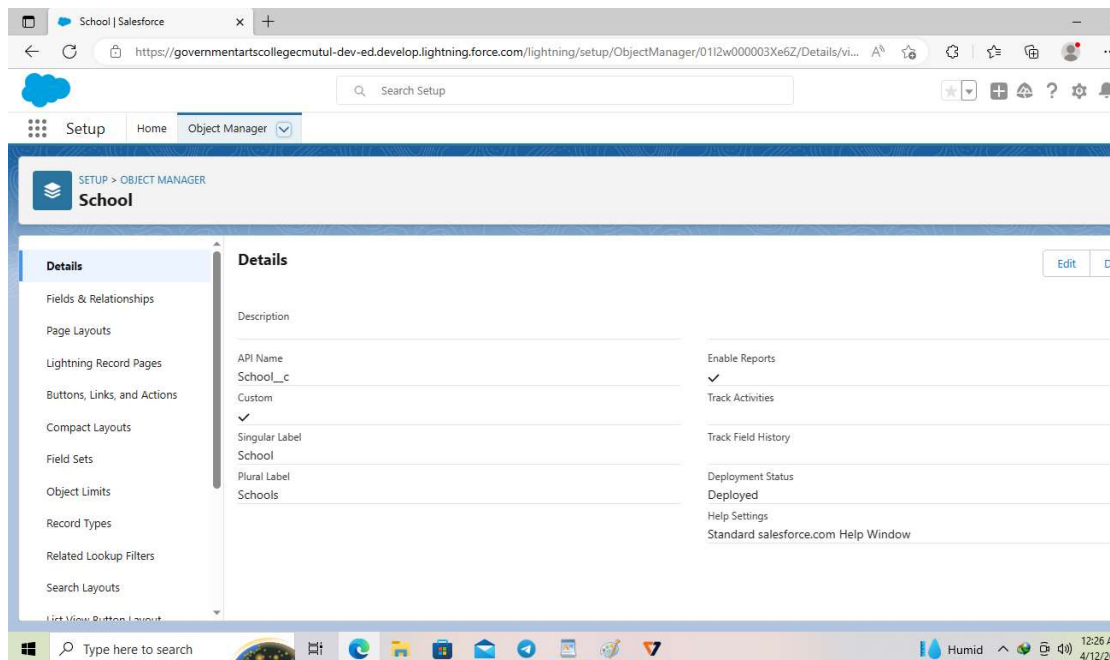
3.2.Activity And Screenshoot:

Milestone 1:Creating developer account

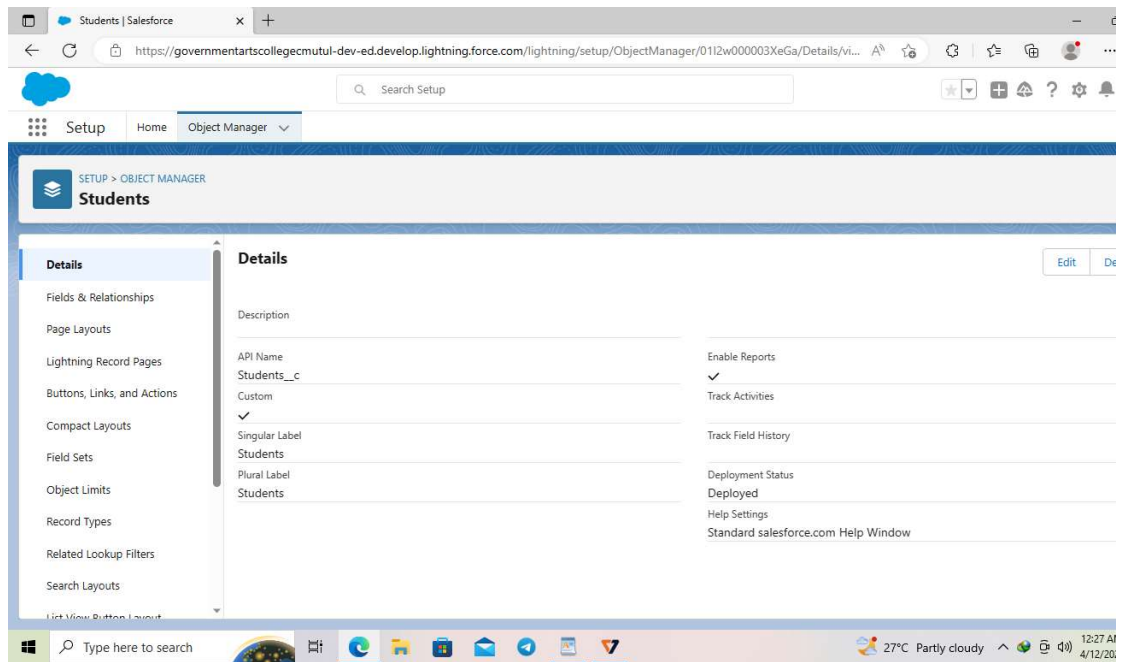


Milestone 2: Creating object

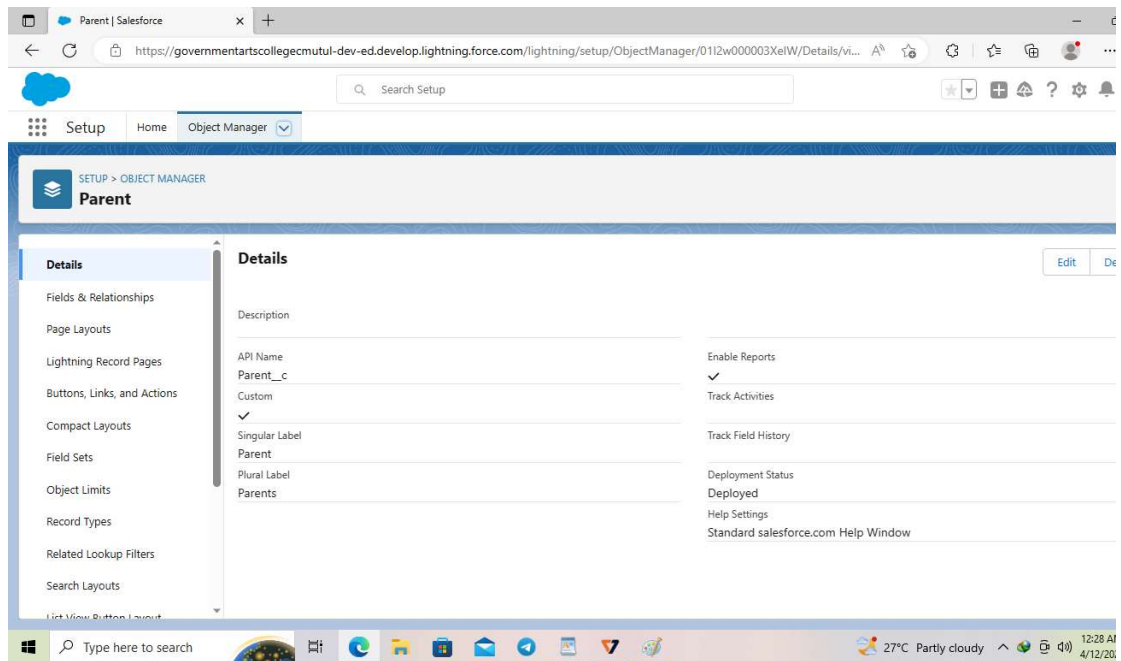
Activity 1: Create school object



Activity 2: Create student object



Activity 3: Create parent object



Milestone 3: Lightning App

Lightning Experience App Manager

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

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

	App Name	Developer Name	Description	Last Modified	App Type	Visible
1	All Tabs	AllTabSet		29/03/2023, 11:02 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	29/03/2023, 11:02 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	29/03/2023, 11:02 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	29/03/2023, 11:04 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	29/03/2023, 11:02 am	Classic	✓

Milestone 4: Fields And Relationship

Activity 1: Create field for school object

School

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Highest mark	Highest_mark__c	Roll-Up Summary (MAX Students)		
Last Modified By	LastModifiedById	Lookup(User)		
number of student	number_of_student__c	Roll-Up Summary (COUNT Students)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		
Phone number	giriraja__c	Phone		
School Name	Name	Text(80)		✓

Activity 2: Create field for student object

Students | Salesforce

https://governmentartscollegecmutl-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XeGa/FieldsAn...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Students

Details

Fields & Relationships

16 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tra

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2:40pm	time_c	Time		
Address	Address_c	Text Area(255)		
Class	Class_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
District	District_c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
marks	marks_c	Number(18, 0)		
Parent	Parent_c	Text(34)		

Type here to search

27°C Partly cloudy 12:33 AM 4/12/20

Activity 3: Create field for parent object

Parent | Salesforce

https://governmentartscollegecmutl-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XeIW/FieldsAn...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

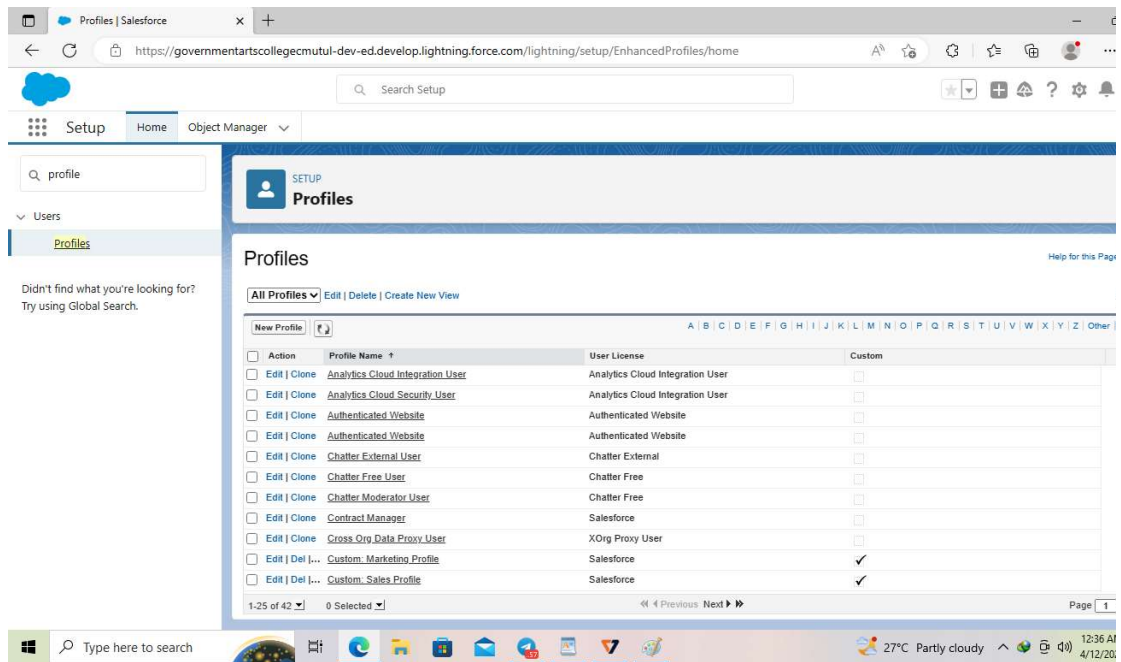
New Deleted Fields Field Dependencies Set History Tra

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created Field Label	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		

Type here to search

27°C Partly cloudy 12:35 AM 4/12/20

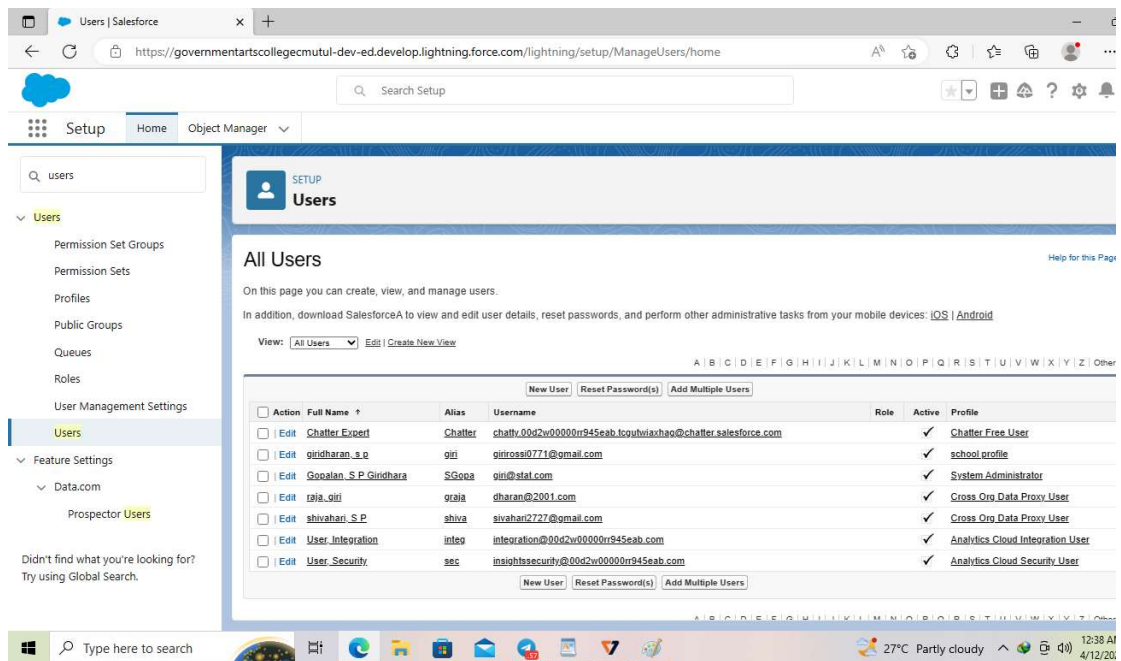
Milestone 5: Profile



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' and a list of navigation items: Users, Profiles, and a search result for 'profile'. The main content area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Custom' column has checkboxes for each profile.

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 Security 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 Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>

Milestone 6: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, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, and Data.com. The main content area is titled 'All Users' and includes a 'New User' button and a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Active' column has checkboxes for each user.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter.00d2w00000r945eab.tguywixhag@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	girdharan_a_o	giri	girirossi0771@gmail.com		<input checked="" type="checkbox"/>	school profile
Edit	Gopalan, S.P. Girdhara	S.Gopa	giri@staf.com		<input checked="" type="checkbox"/>	System Administrator
Edit	raia_giri	grala	dharan@2001.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User
Edit	shivahari_S.P	shiva	shivahari2727@gmail.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User
Edit	User_Integration	intep	integration@00d2w00000r945eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d2w00000r945eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 7: Permission sets

Permission Sets | Salesforce

https://governmentartscollegecmutul-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and ca...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Ama...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
Del Clone	Experience Profile Manager		Salesforce
Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloca...	Facility Manager

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Milestone 8: Reports

Reports | Salesforce

https://governmentartscollegecmutul-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Lightning Usage App Lightning Usage Schools Students Parents Reports

Search...

Reports

Recent 3 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Schools with Students Report		Private Reports	S P Giridhara Gopalan	5/4/2023, 8:09 pm	
Created by Me	New Parents Report		Private Reports	S P Giridhara Gopalan	5/4/2023, 8:13 pm	
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	29/3/2023, 11:02 am	

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

4. Trailhead Profile Public URL

Team Lead-<https://trailblazer.me/id/asathiya10>

Team Member 1-<https://trailblazer.me/id/nisri31>

Team Member 2-<https://trailblazer.me/id/moganram>

Team Member 3 – <https://trailblazer.me/id/vvignesh35>

Project Report Template

5. Advantage&Disadvantage:

ADVANTAGE:

1. Improved Informational Organization. ...
2. CRM for Enhanced Communication. ...
3. CRM Improves Your Customer Service. ...
4. Automation of Everyday Tasks. ...
5. Greater efficiency for multiple teams. ...
6. Improved Analytical Data and Reporting.

DISADVANTAGE:

1. CRM costs. One of the greatest challenges to CRM implementation is cost. ...
2. Business culture. A lack of commitment or resistance to cultural change from people within

the company can cause major difficulties with CRM implementation. ...

3. Poor communication. ...

4. Lack of leadership.

6. Application:

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

7. Conclusion:

Customer Relationship Management (CRM) enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer

loyalty.

8. Future Scope:

Defining the scope of CRM projects means figuring out which areas of your business need to be included in the CRM implementation plan. Before any CRM initiative begins, scoping is essential to establish what the effort will and will not cover, as well as to prevent feature creep and project bloating.