

A CRM Application For School or College

1. Introduction

1.1.Overview:

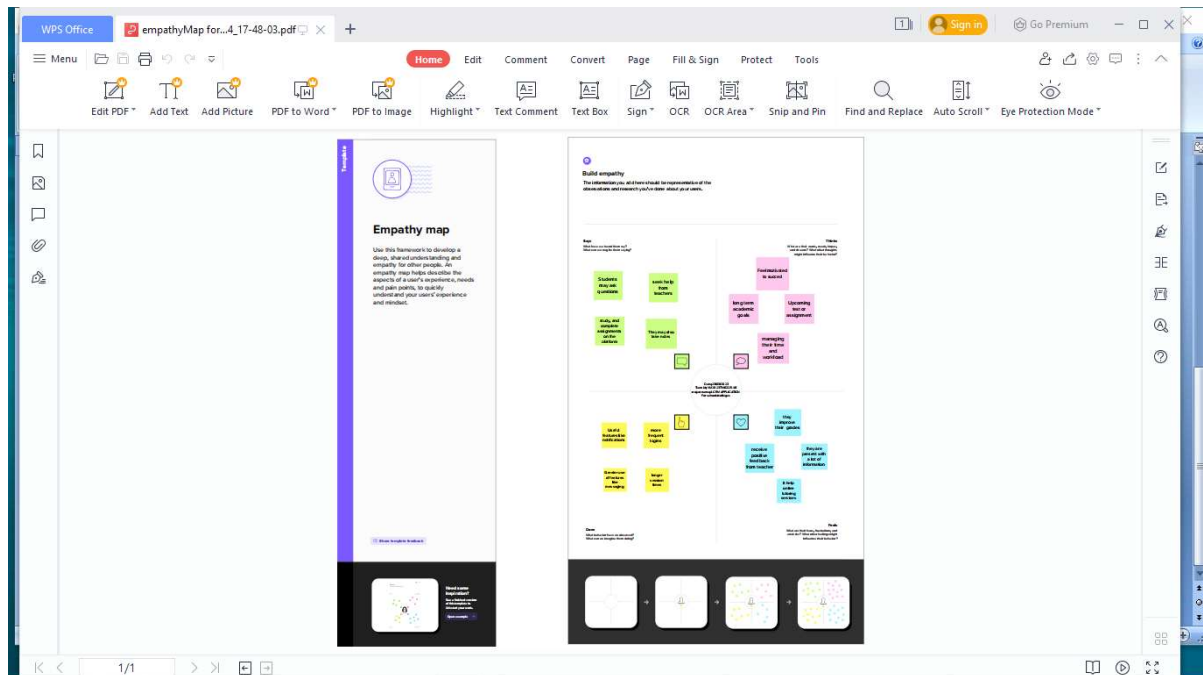
A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

1.2.Purpose:

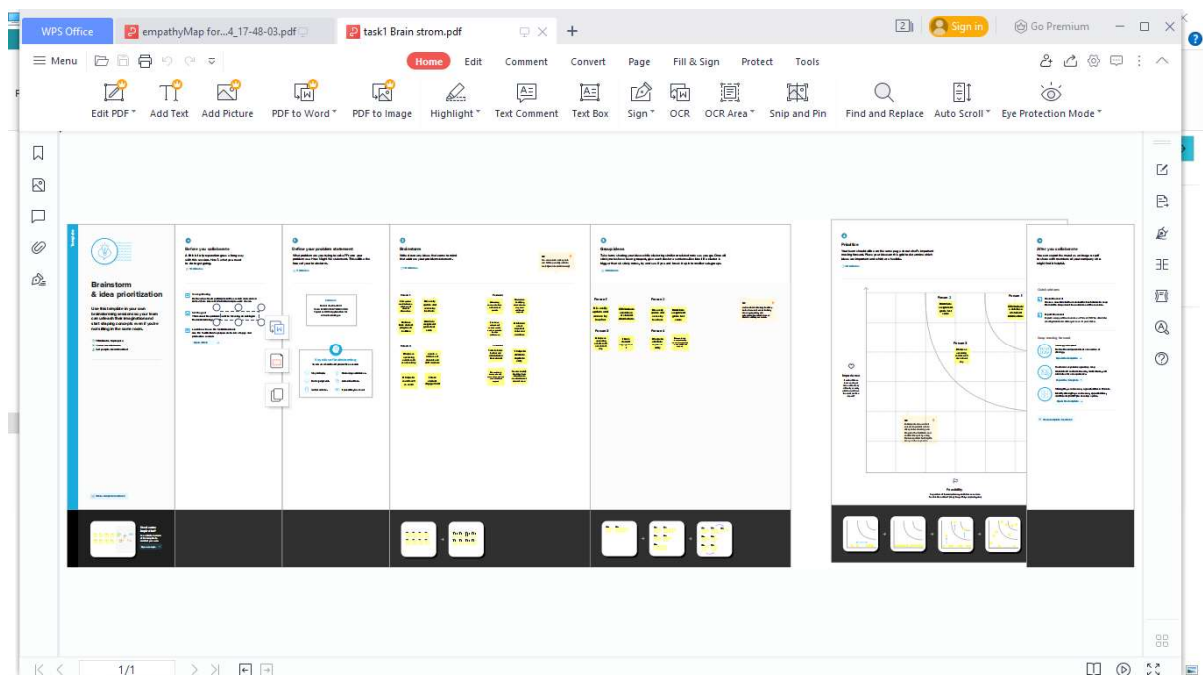
Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many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

2. Problem Definition &Design Thinking

2.1. EmpathyMap:



2.2. Ideation & Brainstorming Map



3. Result

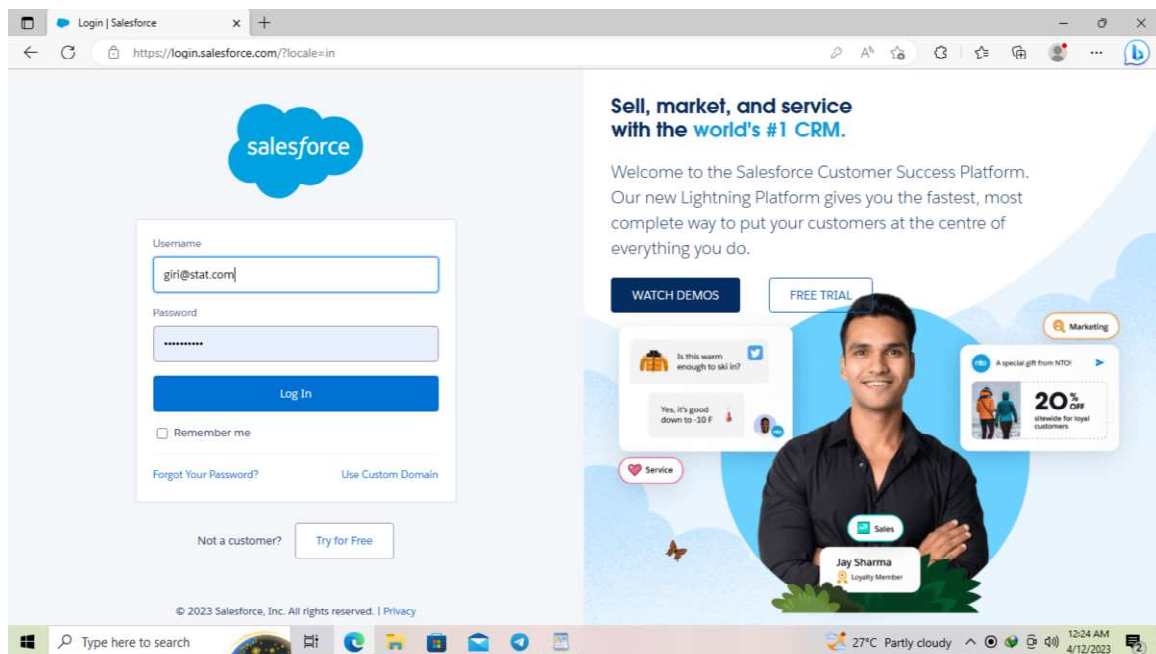
3.1. Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
school	Field label	Data Type
	Address	Text area
	Number of student	Roll up summary
	Phone number	Phone
Student	Field label	Data Type
	Phone number	Phone
	School	Master detail relationship
	Result	Picklist
	Class	Number

Parent	Field label	Data type
	Parent Address	Text
	Parent Number	Phone

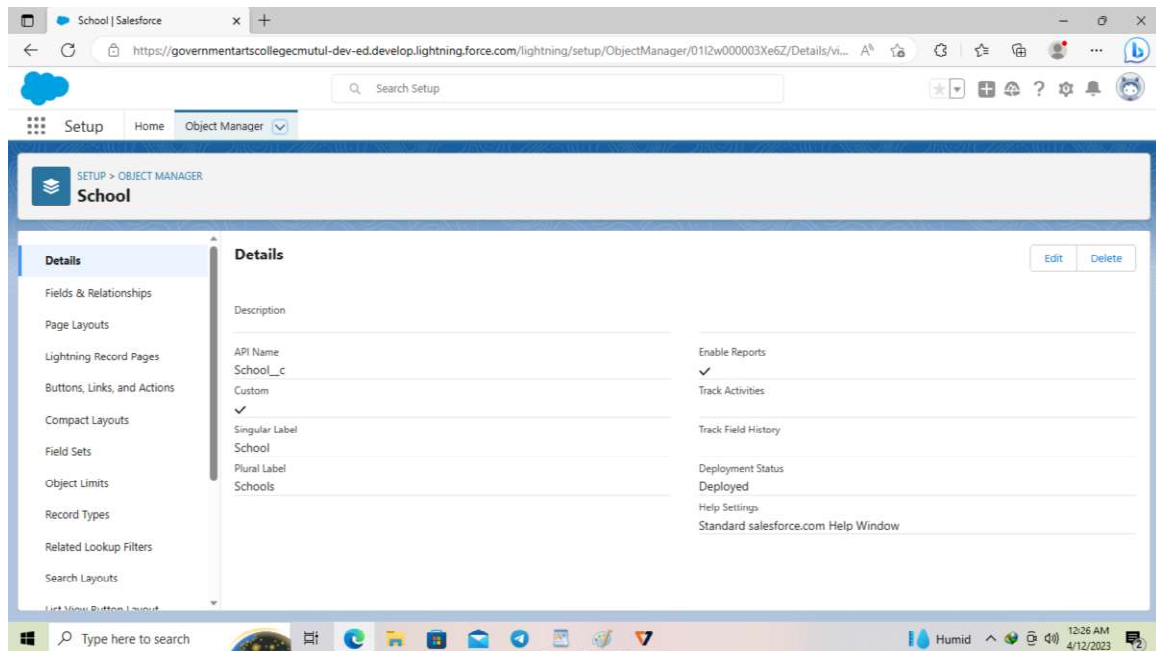
3.2.Activity And Screenshoot:

Milestone 1:Creating developer account

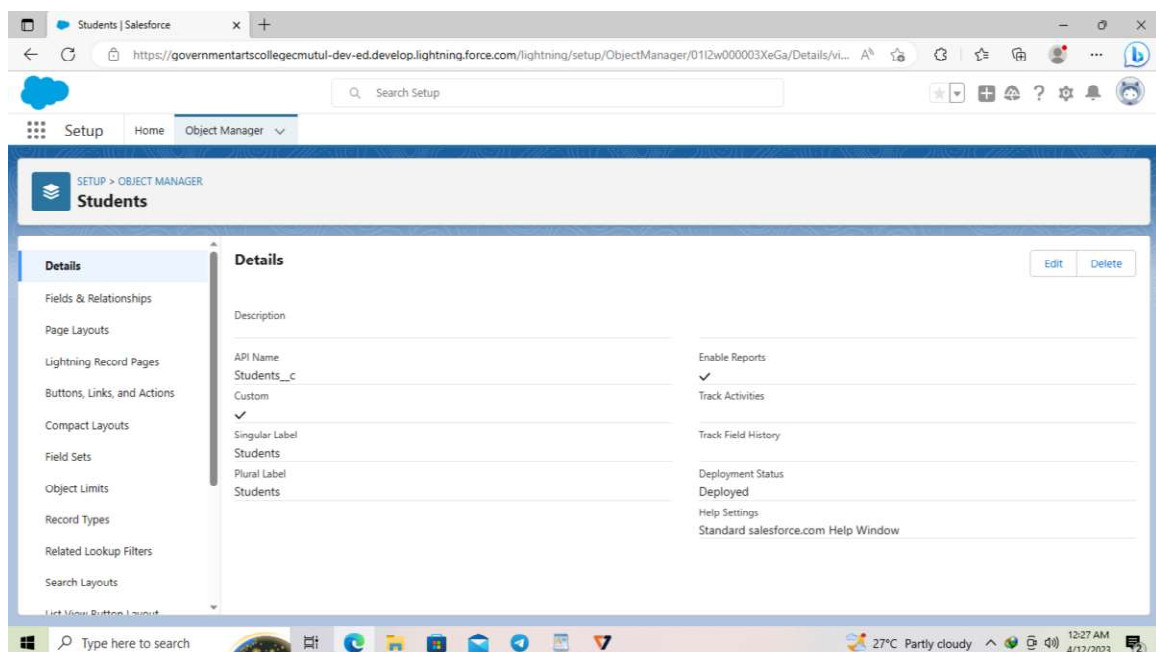


Milestone 2: Creating object

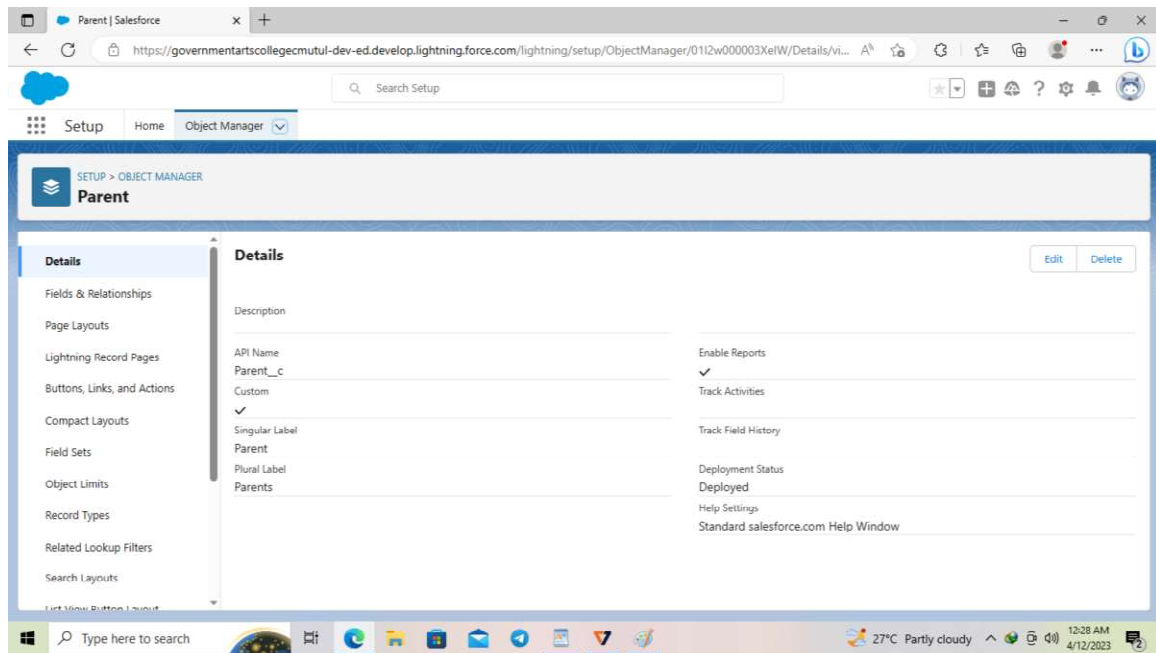
Activity 1: Create school object



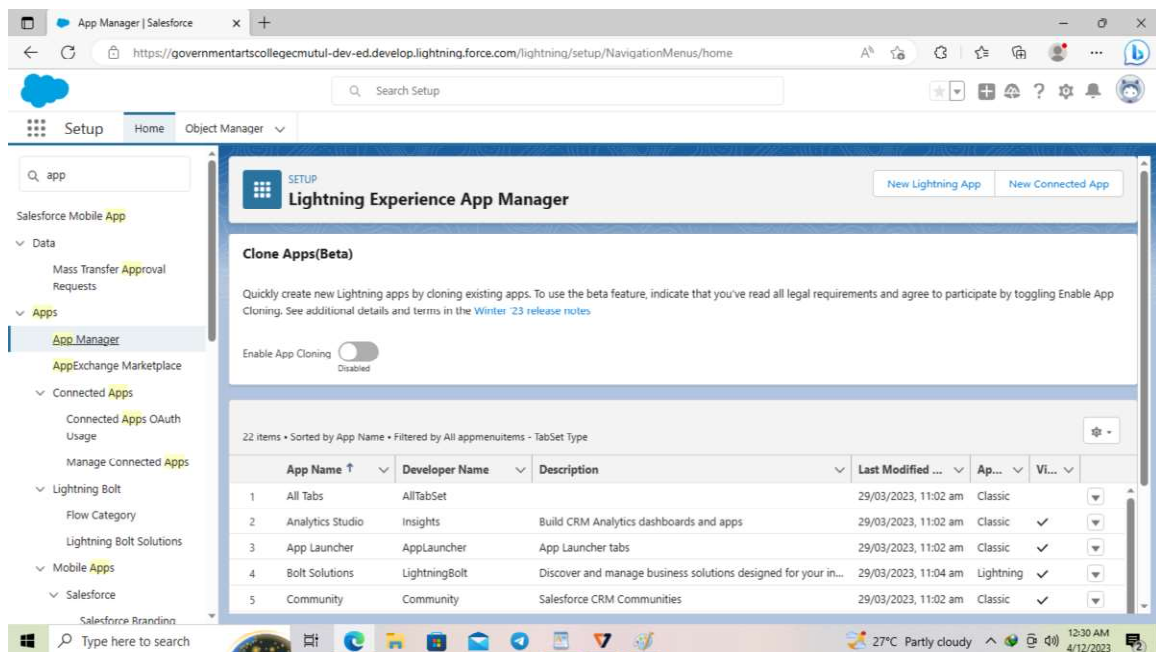
Activity 2: Create student object



Activity 3: Create parent object

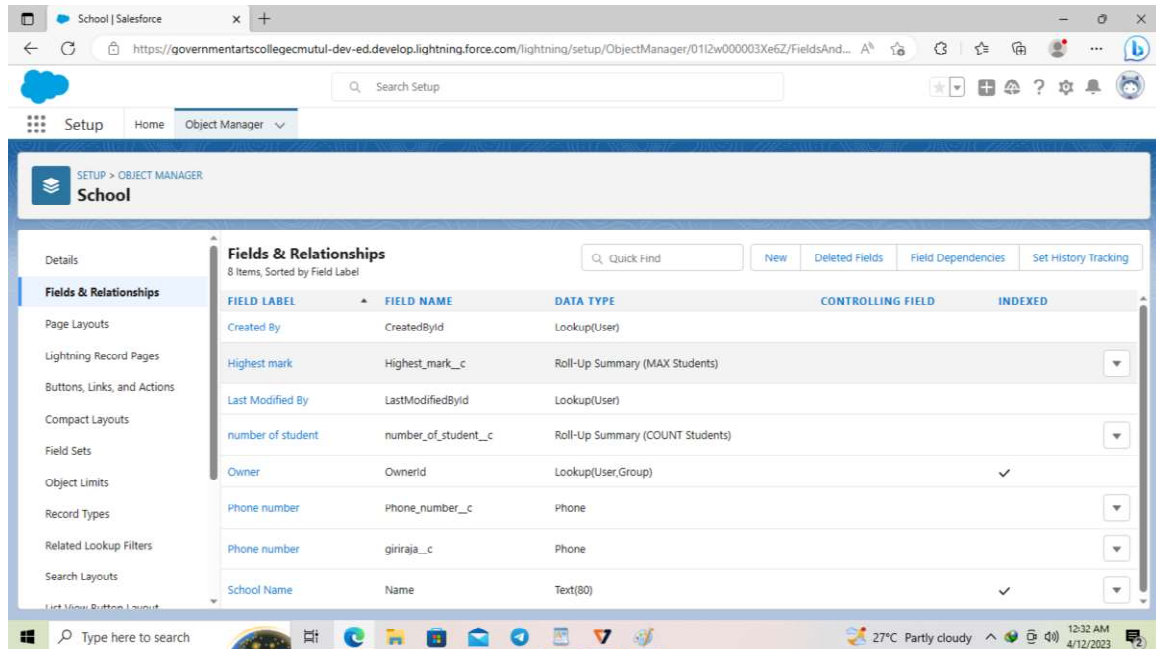


Milestone 3: Lighting App



Milestone 4: Fields And Relationship

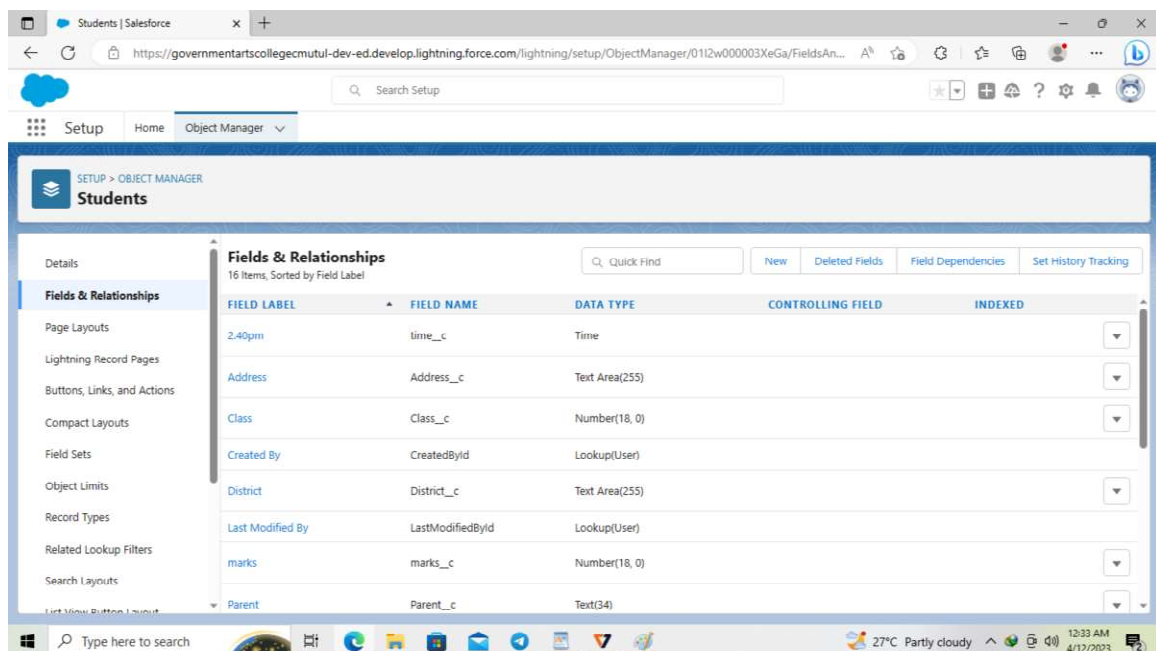
Activity 1: Create field for school object



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

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)		✓

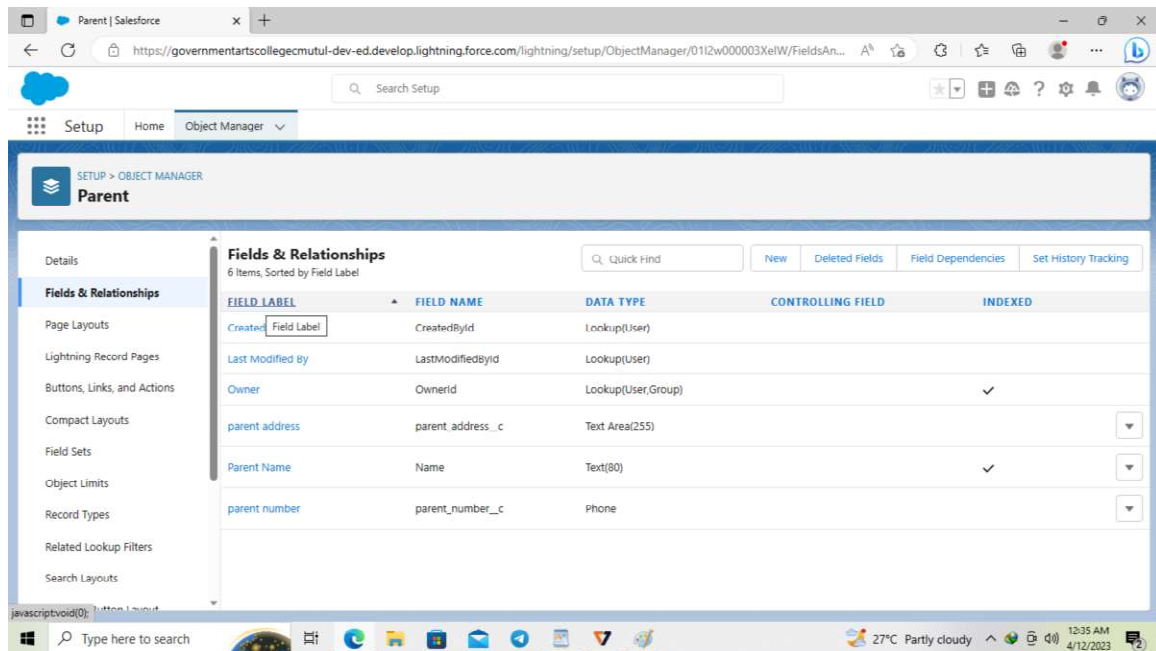
Activity 2: Create field for student object



The screenshot shows the Salesforce Setup interface for the 'Students' object. The 'Fields & Relationships' section is active, displaying a list of 16 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

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)		

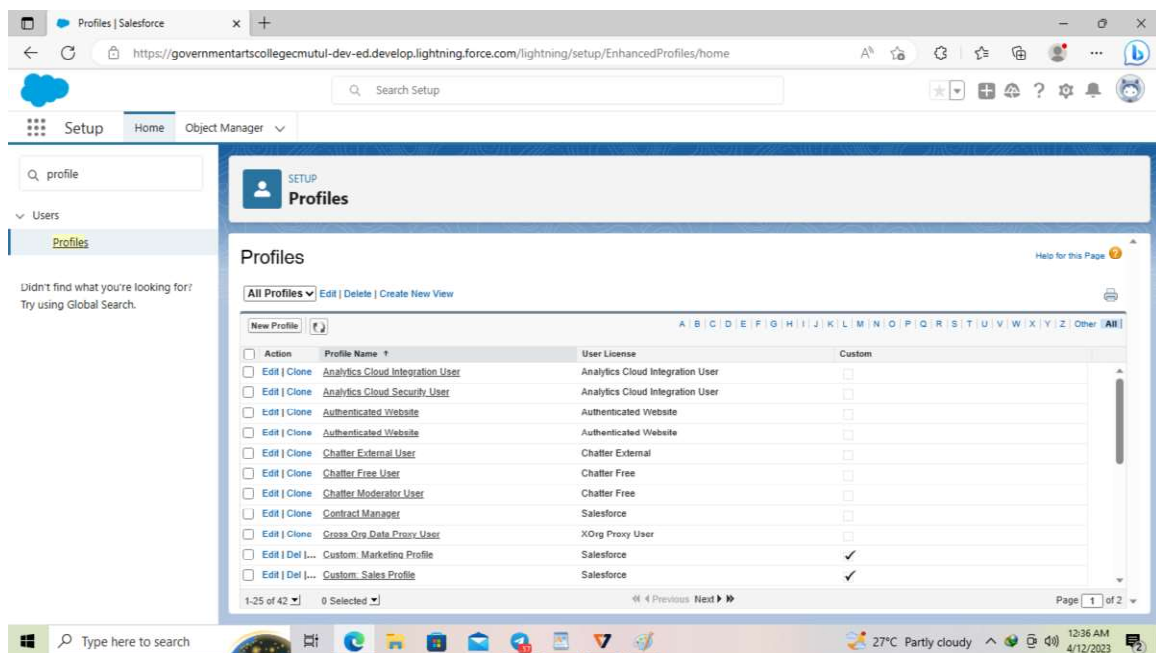
Activity 3: Create field for parent object



The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a list of fields. The table below represents the data shown in the interface.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created	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



The screenshot shows the Salesforce Setup interface for Profiles. The 'Profiles' section is active, displaying a list of profiles. The table below represents the data shown in the interface.

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 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 managing users. The left sidebar contains a search bar and a navigation menu with categories like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes instructions on how to manage users. Below the instructions, there is a table listing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains several rows of user data, including 'Chatter Expert', 'Giridharan S.P', 'Gopalan S.P', 'Rajia P', 'Shivahari S.P', 'User Integration', and 'User Security'. At the bottom of the page, there is a Windows taskbar with various application icons and system information.

Users | Salesforce

https://governmentartscollegemutul-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Users

All 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 View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.0062v00000r945eab.100u1x1xhaa@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Giridharan S.P	giri	girtross0771@gmail.com		✓	school profile
<input type="checkbox"/> Edit	Gopalan S.P Giridhara	SGopa	gisi@stat.com		✓	System Administrator
<input type="checkbox"/> Edit	Rajia P	praja	gharan@2001.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	Shivahari S.P	shiva	shivahar2727@gmail.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	User Integration	intep	integration@0062v00000r945eab.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	ms0thbssecurity@0062v00000r945eab.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

27°C Partly cloudy 12:30 AM 4/12/2023

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

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global 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, subloa...	Facility Manager

1-25 of 28 0 Selected Previous Next Page 1 of 2

Type here to search

27°C Partly cloudy 12:39 AM 4/12/2023

Milestone 8: Reports

Reports | Salesforce

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

Lightning Usage App Lightning Usage Schools Students Parents Reports

Search...

Search recent reports...

New Report New Folder

3 items

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

Type here to search

27°C Partly cloudy 12:40 AM 4/12/2023

4. Trailhead Profile Public URL

Team Lead-<https://trailblazer.me/id/gdharan16>

Team Member 1-<https://trailblazer.me/id/girik18>

Team Member 2-<https://trailblazer.me/id/dganesan17>

Team Member 3 –<https://trailblazer.me/id/dkishore18>

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:

CRM costs. One of the greatest challenges to CRM implementation is cost. ...

Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. ...

Poor communication. ...

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.