

# A CRM Application For School or College

## 1. Introduction

### 1.1.Overview:

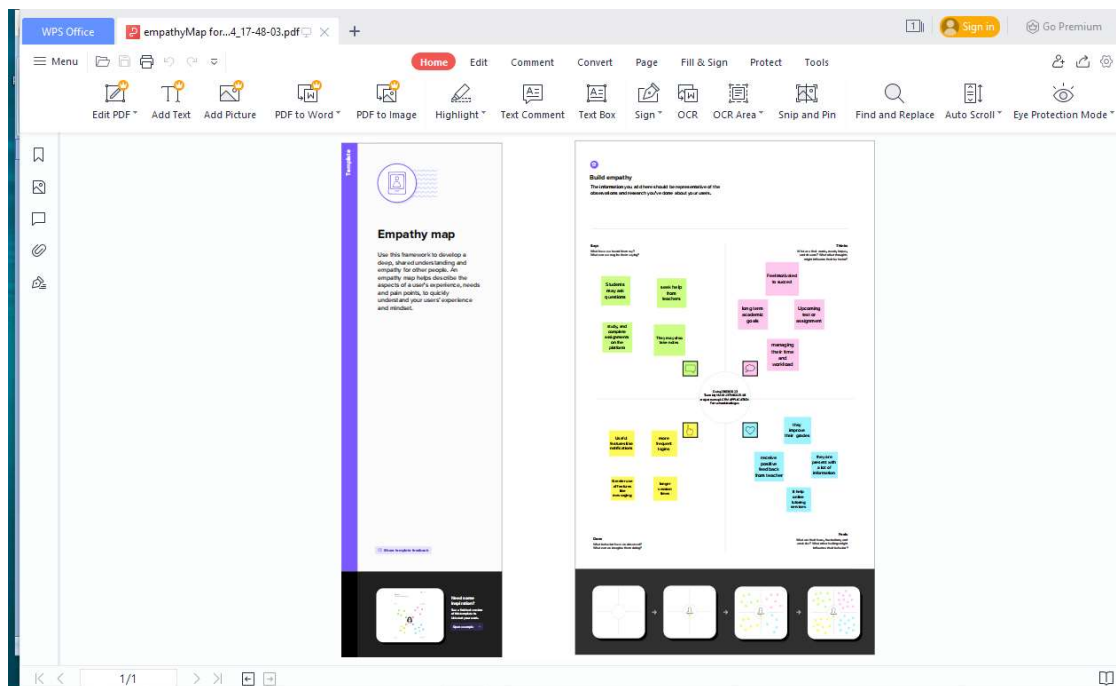
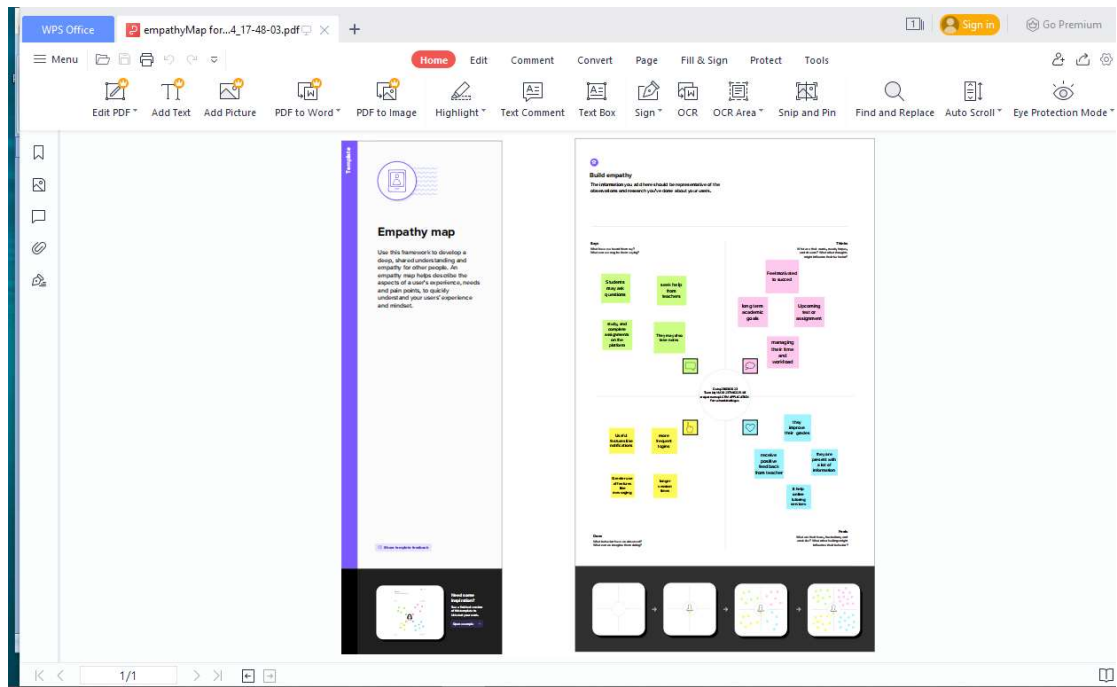
A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

### 1.2.Purpose:

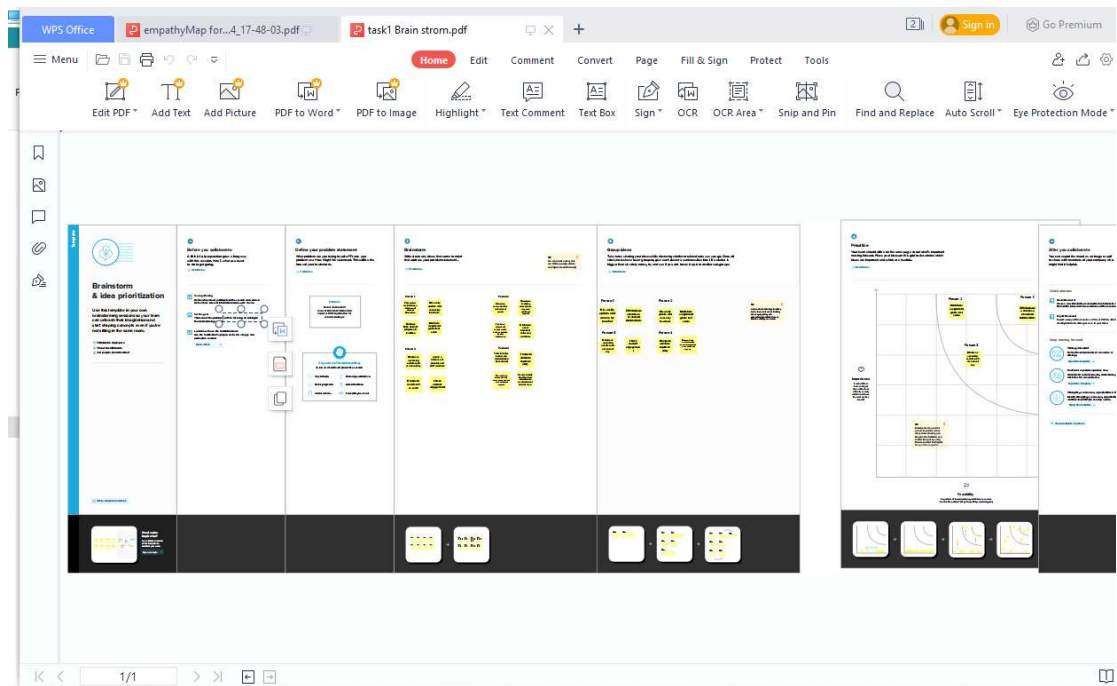
Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many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

## 2. Problem Definition &Design Thinking

### 2.1. Empathy Map:



## 2.2.Ideation&Brainstorming Map:



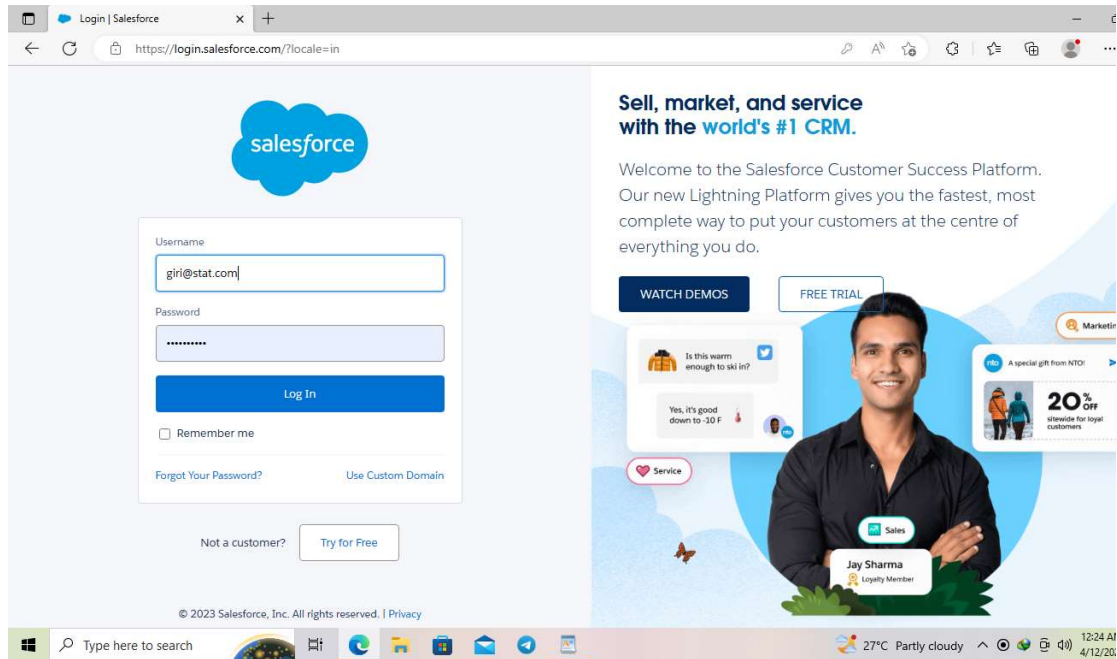
### 3. Result

#### 3.1.Data Model

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

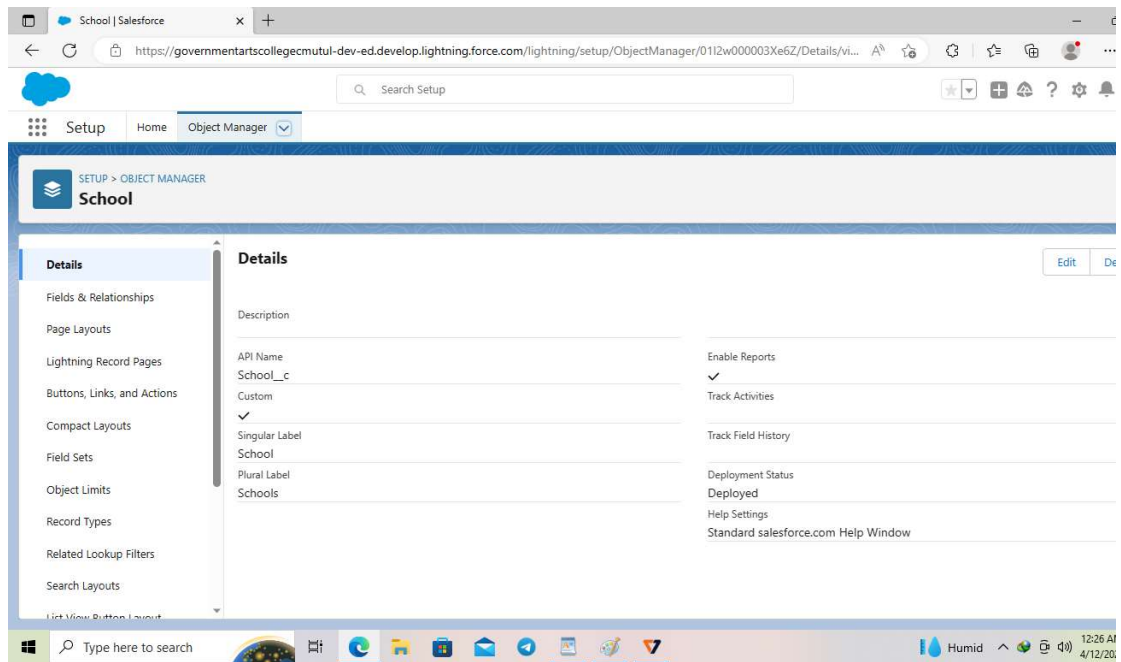
### 3.2.Activity And Screenshoot:

#### Milestone 1:Creating developer account

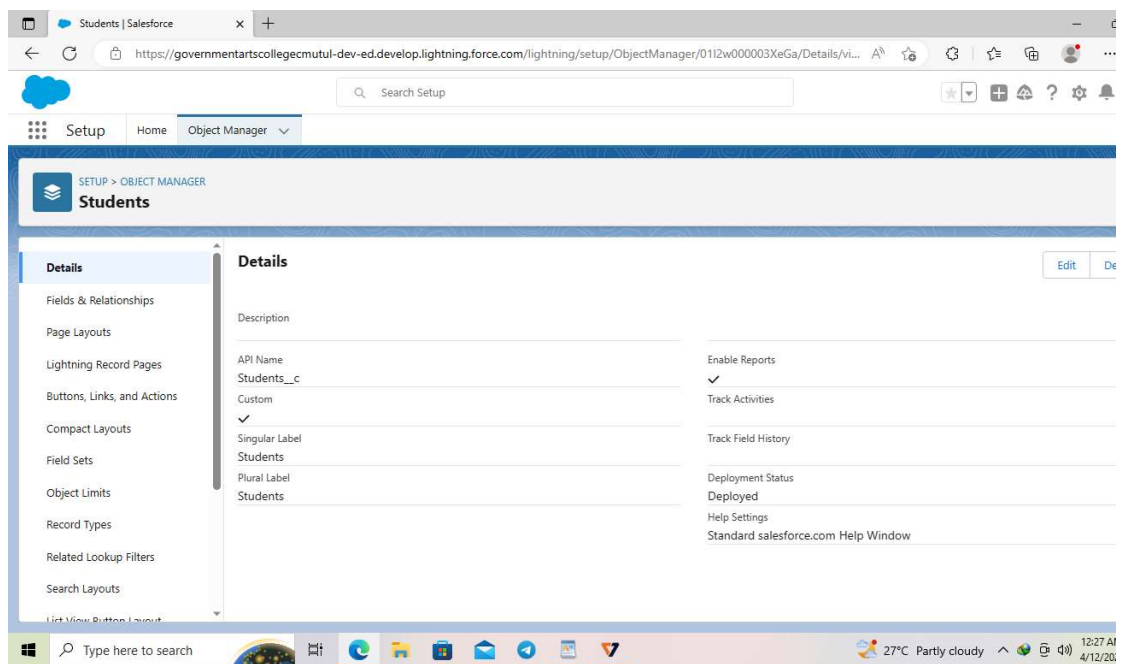


#### Milestone 2: Creating object

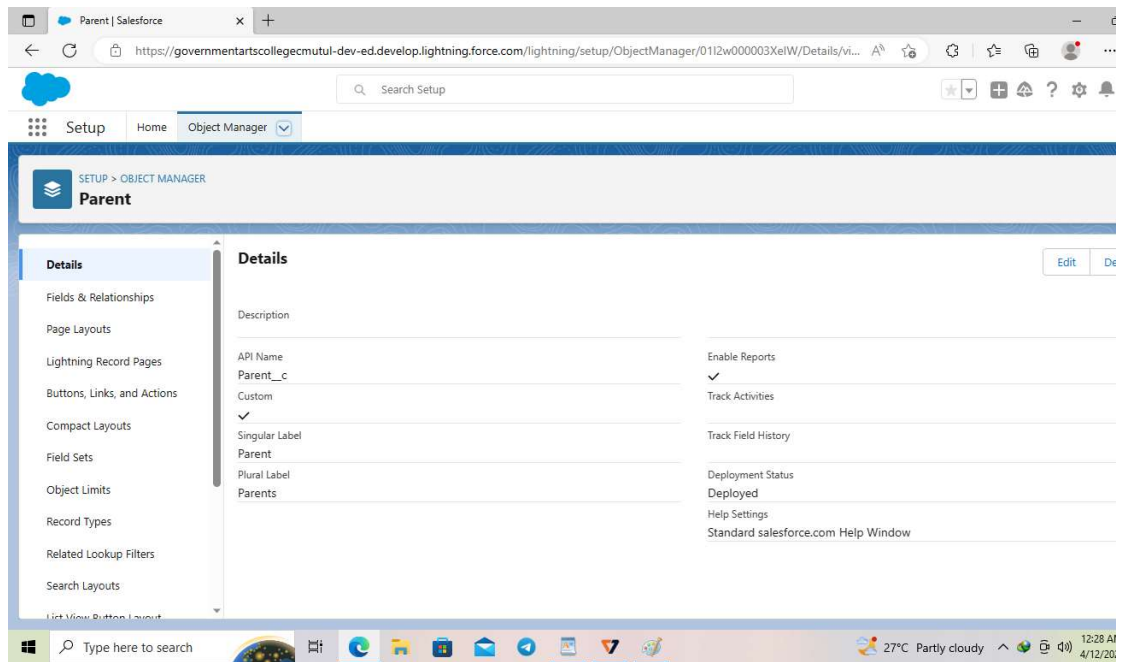
##### Activity 1:Create school object



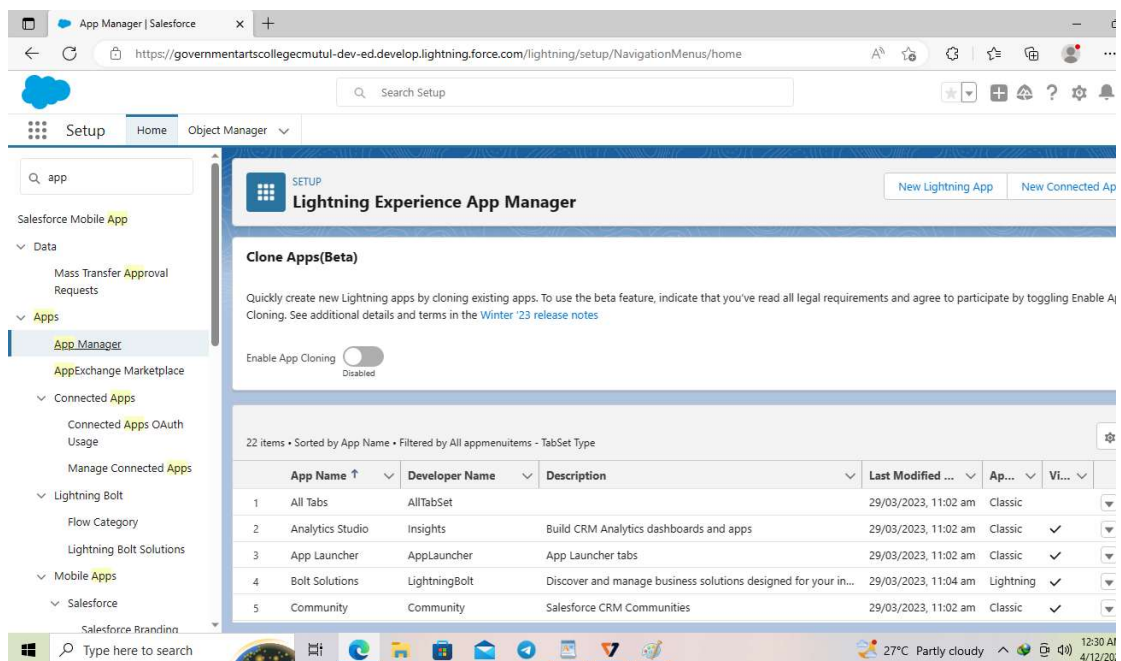
## Activity 2: Create student object



## Activity 3: Create parent object



## Milestone 3: Lightning App



## Milestone 4: Fields And Relationship

### Activity 1: Create field for school object

Setup > OBJECT MANAGER

**School**

Details

**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

Setup > OBJECT MANAGER

**Students**

Details

**Fields & Relationships**  
16 Items, Sorted by Field Label

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

Parent | Salesforce

https://governmentartscollegecmul-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XeW/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	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

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## Milestone 5:Profile

Profiles | Salesforce

https://governmentartscollegecmul-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profile

Users

**Profiles**

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

SETUP  
**Profiles**

Profiles

All Profiles Edit Delete Create New View

New 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 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"/>

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Type here to search

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## Milestone 6:Users



**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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter_Eve	Chatter	chatter.00d2w00000r945eab.tgubwixhag@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	giridharan_a_p	giri	girirosa0771@gmail.com		✓	school profile
<a href="#">Edit</a>	Gopalak_S_P	Gopa	giri@stat.com		✓	System Administrator
<a href="#">Edit</a>	raja_giri	raja	dharan@2001.com		✓	Cross Org Data Proxy User
<a href="#">Edit</a>	shivahari_S_P	shiva	shivahari2727@gmail.com		✓	Cross Org Data Proxy User
<a href="#">Edit</a>	User_Integration	intec	integration@00d2w00000r945eab.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00d2w00000r945eab.com		✓	Analytics Cloud Security User

## Milestone 7: Permission sets

**Permission Sets**

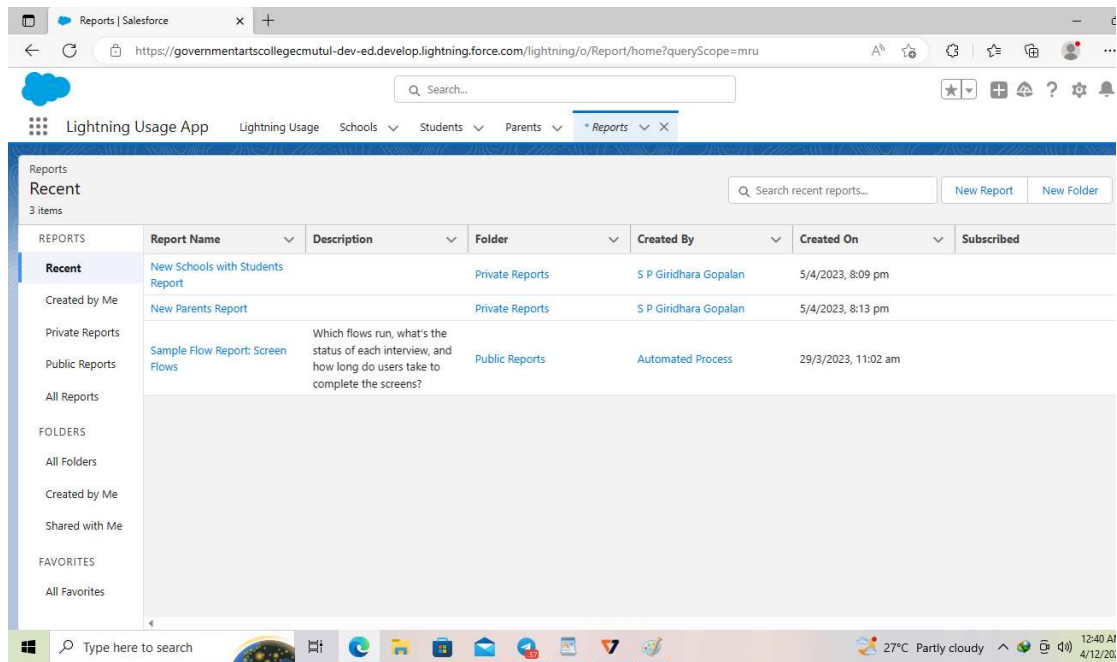
On this page you can create, view, and manage permission sets.

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

## Milestone 8: Reports



#### 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:

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.