

PROJECT REPORT

A CRM APPLICATION SCHOOLS & COLLEGES

1 INTRODUCTION

1.1 Overview

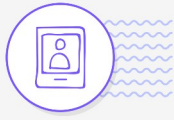
A CRM system helps you keep your customer's contact details up to date, track every interaction they have with your business, and manage their accounts. It's designed to help you, improve your customer relationships, and in turn, customer lifetime value.

1.2 purpose

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

2 Problem Definition & Design Thinking

2.1 Empathy Map



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

Build empathy

Build empathy

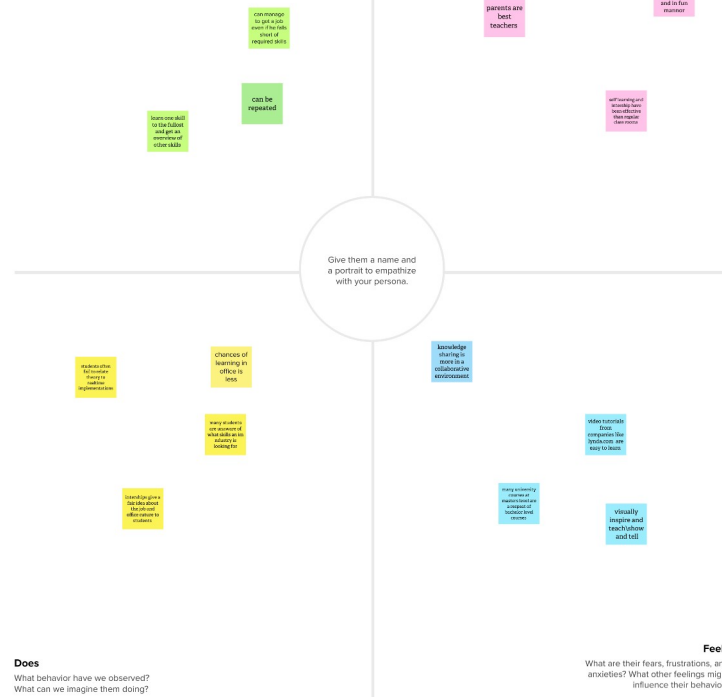
The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?



Does

What behavior have we observed?
What can we imagine them doing?

Feels

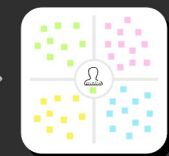
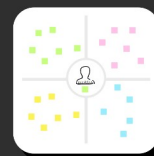
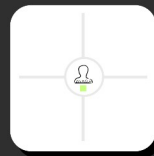
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



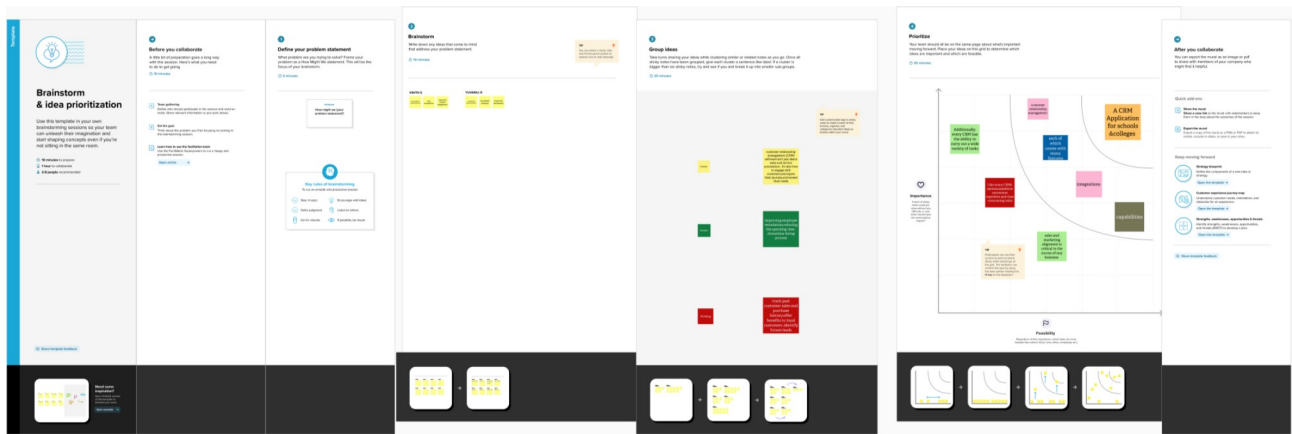
Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#) →



2.2 Ideation & Brainstorming map



3. RESULT

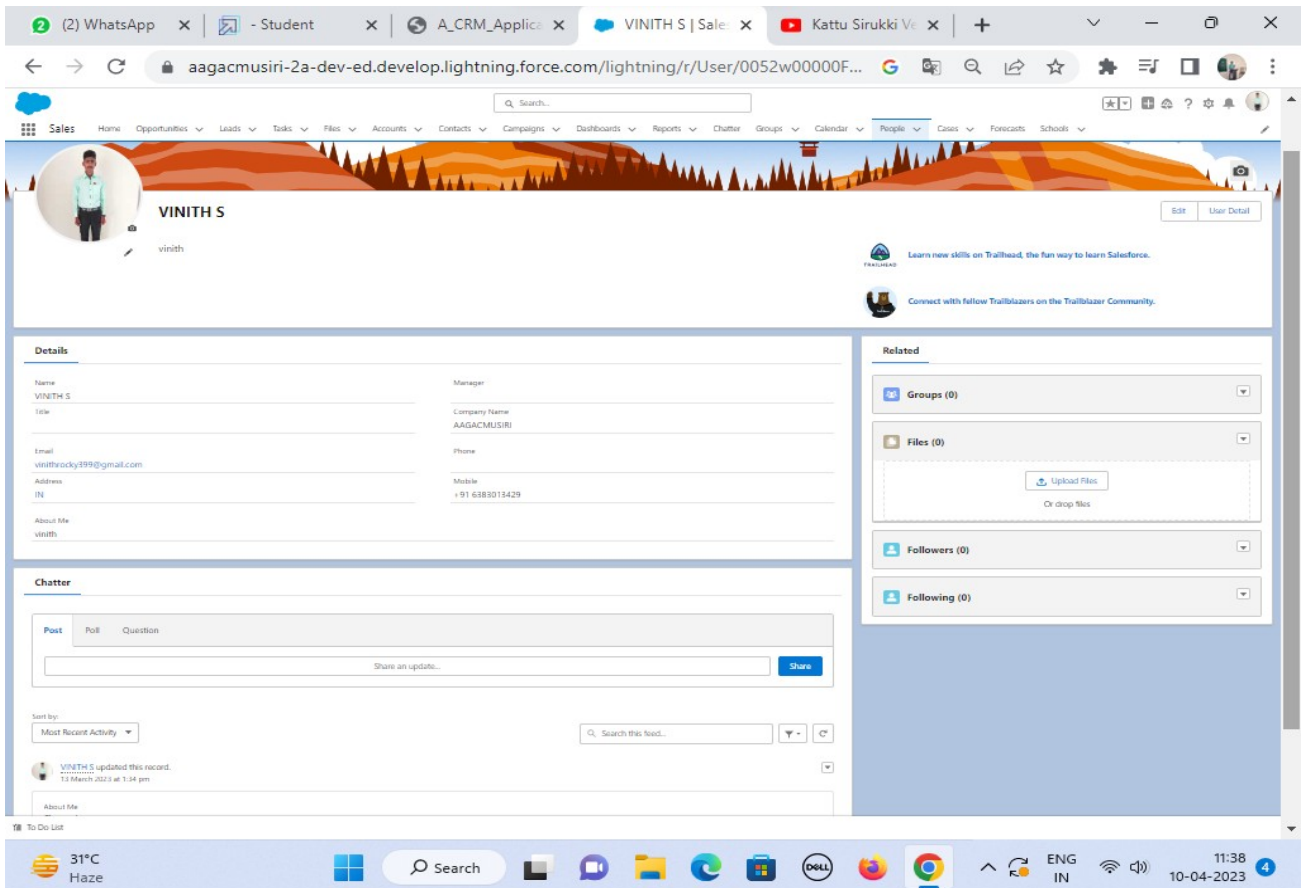
3.1 Data model ;

Object name	Fields in the object	
Obj1	Field label	Data type
	School	Long Text Area
obj2	Field label	Data type
	Recruiter	Text Area

3.2 Activity & screenshot

Milestone-1

Activity-1:



MILESTONE-2;OBJECT

Activity-1: Creation of School Object Creation of Objects for School Management:

Browser tabs: (2) WhatsApp, - Student, A_CRM_Applic..., Home | Salesfo..., Home | Salesfo...

Address bar: aagacmusiri-2a-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home

- Service Setup Assistant
- Multi Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps
- > Feature Settings
- > Stack
- > MuleSoft
- > Binds
- > Objects and Fields
- > Events
- > Process Automation
- > User Interface
- > Custom Code
- > Development
- > Performance
- > Environments
- > User Engagement
- > Integrations
- > Notification Builder
- > Offline

SETTINGS

- > Company Settings

Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
6583013429	Custom Field Definition	School
School	Custom Field Definition	School
Address	Custom Field Definition	School
Recruiter	Custom Field Definition	School
School	Custom Object Definition	
VINETH S	User	
School	Permission Set	
Vineth S	User	
Content	Custom App	
salesforce	Custom App	

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Search

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Activity 2: Create student object

Maskara Sc

(3) WhatsApp

- Student

A_CRM_Applic

Tabs | Salesforce

←

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🔒 aagacmusiri-2a-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

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🔍 Search Setup

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👤

⋮

Setup

Home

Object Manager

🔍 tabs

⌵ User Interface

Rename Tabs and Labels

Tabs

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

⚙️

SETUP

Tabs

Custom Tabs

Help for this Page

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 What Is This?

Action	Label	Tab Style	Description
Edit Del	Schools	Carducarus	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined

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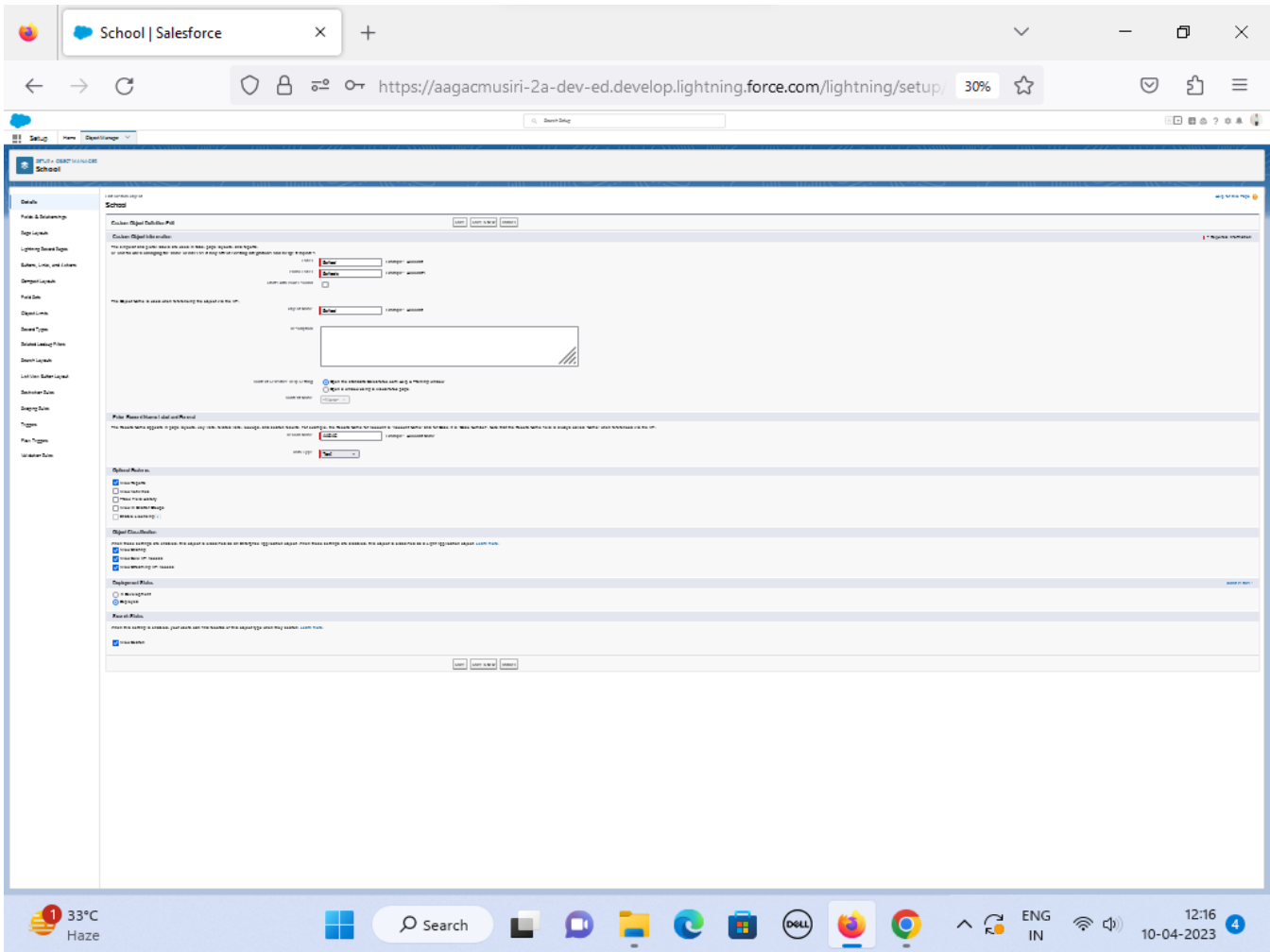
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12:32
10-04-2023

4

Activity 3: Create parent object



Milestone-3:Lightning App

Activity: Create the School Management app

Setup Home Object Manager

Search Setup

app mana

App Manager

Lightning Experience App Manager

New Lightning App New Connected App

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 ☐ On/Off

27 items • Sorted by App Name • Filtered by All app menu items - Tablet Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
1 AAGAC	AAGAC		13/05/2023, 1:13 pm	Lightning	✓
2 All Tabs	AllTabs		10/05/2023, 12:25 pm	Classic	✓
3 Analytics Studio	insights	Build CRM Analytics dashboards and apps	10/05/2023, 12:25 pm	Classic	✓
4 App Launcher	AppLauncher	App Launcher tabs	10/05/2023, 12:25 pm	Classic	✓
5 Aringar anna arts college musiri	Aringar_anna_arts_college_musiri		13/05/2023, 2:11 pm	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/05/2023, 12:27 pm	Lightning	✓
7 Community	Community	Salesforce CRM Communities	10/05/2023, 12:25 pm	Classic	✓
8 Content	Content	Salesforce CRM Content	10/05/2023, 12:25 pm	Classic	✓
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	10/05/2023, 12:25 pm	Lightning	✓
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/05/2023, 12:25 pm	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/05/2023, 12:25 pm	Lightning	✓
12 Marketing	Marketing	Best in class on demand marketing automation	10/05/2023, 12:25 pm	Classic	✓
13 Platform	Platform	The fundamental Lightning Platform	10/05/2023, 12:25 pm	Classic	✓
14 Queue Management	QueueManagement	Create and manage queues for your business.	10/05/2023, 12:25 pm	Lightning	✓
15 Sales	Sales	The world's most popular sales force automation (SFA) solution	10/05/2023, 12:25 pm	Classic	✓
16 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	10/05/2023, 12:28 pm	Lightning	✓
17 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	10/05/2023, 12:25 pm	Lightning	✓
18 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	10/05/2023, 12:25 pm	Classic	✓
19 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling	10/05/2023, 12:27 pm	Lightning	✓
20 school management	school_management		13/05/2023, 12:14 pm	Lightning	✓
21 school management	school		13/05/2023, 1:01 pm	Lightning	✓
22 school management	collage		13/05/2023, 1:45 pm	Lightning	✓
23 School management	student		16/05/2023, 1:05 pm	Lightning	✓
24 Service	Service	Manage customer service with accounts, contacts, cases, and more	10/05/2023, 12:25 pm	Classic	✓

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Search

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Milestone -4:Fields and Relationship

Activity-1: Creation of fields for the School objects:

Browser tabs: Bheema Tai, (4) WhatsApp, - Student, A_CRM_Applic..., School | Salesf...

Address bar: aagacmusiri-2a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

School

Details

Fields & Relationships 8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
6383013429	X6383013429__c	Text(30)		
AAGAC	Name	Text(80)		✓
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Recruiter	Recruiter__c	Text Area(255)		
School	School__c	Long Text Area(32768)		

Taskbar: 34°C Haze, Search, Taskbar icons, ENG IN, 12:42 10-04-2023

Activity-2: Creation of fields for the Student objects:

Browser tabs: Karuppu Pe..., (3) WhatsApp, - Student, A_CRM_Applic..., Object Manage...

Address bar: aagacmusiri-2a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/ho...

Search Setup

Setup Home Object Manager

Object Manager

22 Items, Sorted by Label

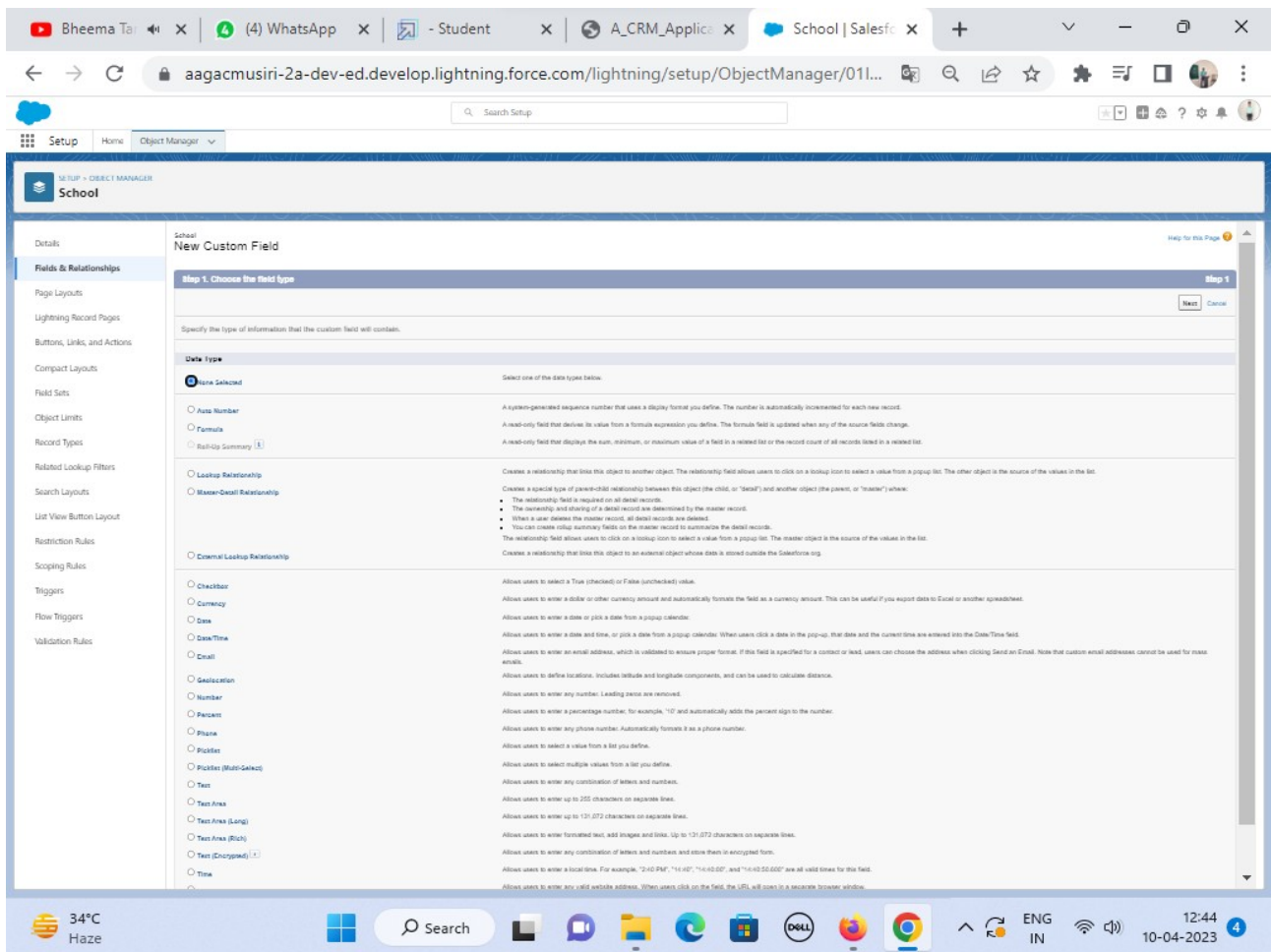
student Schema Builder Create

student

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Cart Adjustment Basis	WebCartAdjustmentBasis	Standard Object			
Cart Adjustment Group	WebCartAdjustmentGroup	Standard Object			
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Change Request	ChangeRequest	Standard Object			
Change Request Related Issue	ChangeRequestRelatedIssue	Standard Object			
Change Request Related Item	ChangeRequestRelatedItem	Standard Object			
Contact Request	ContactRequest	Standard Object			
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object			
Customer	Customer	Standard Object			
List Email	ListEmail	Standard Object			

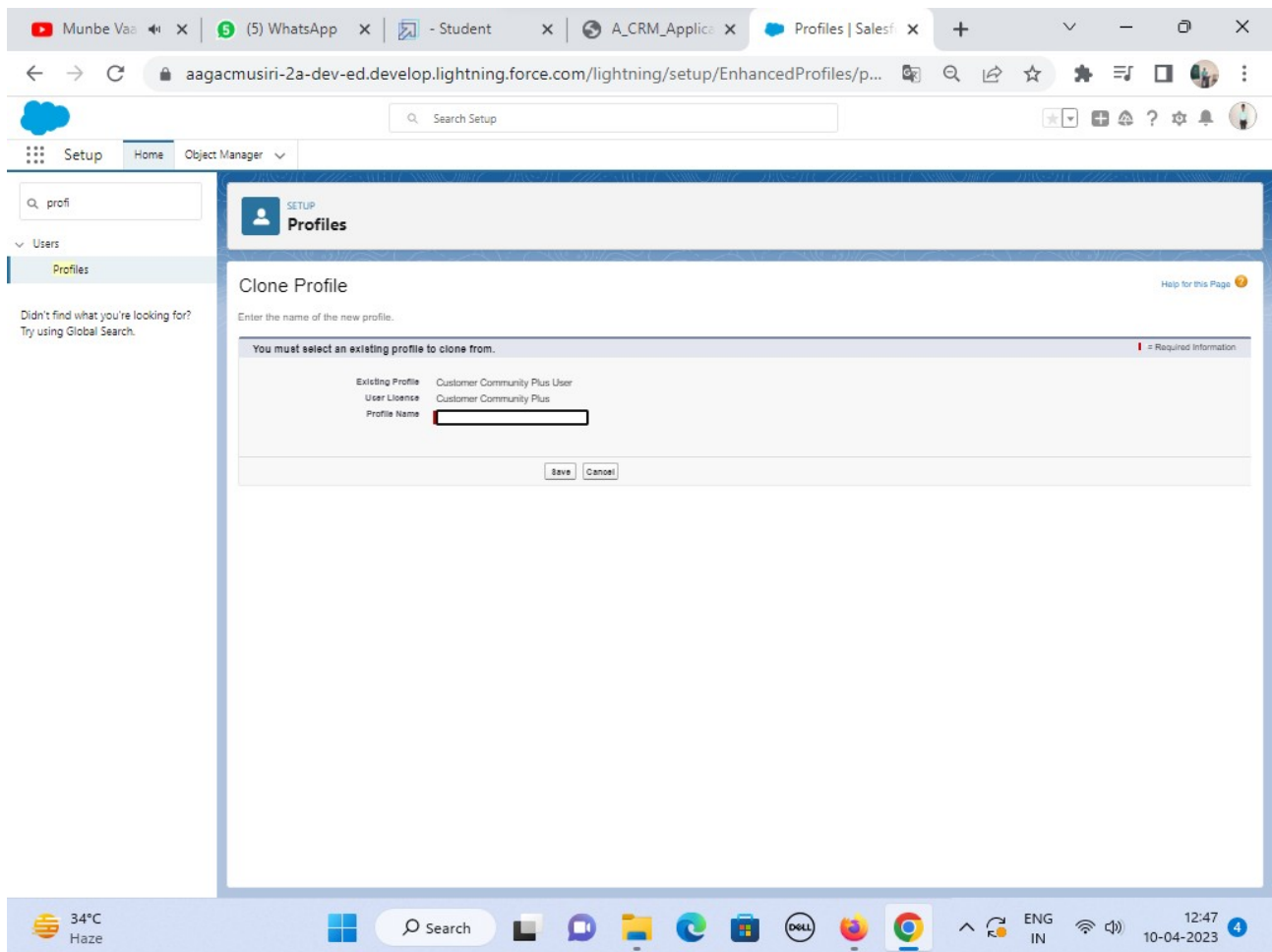
34°C Haze Search DELL 12:40 10-04-2023

Activity-3: Creation of fields for the Parent objects:



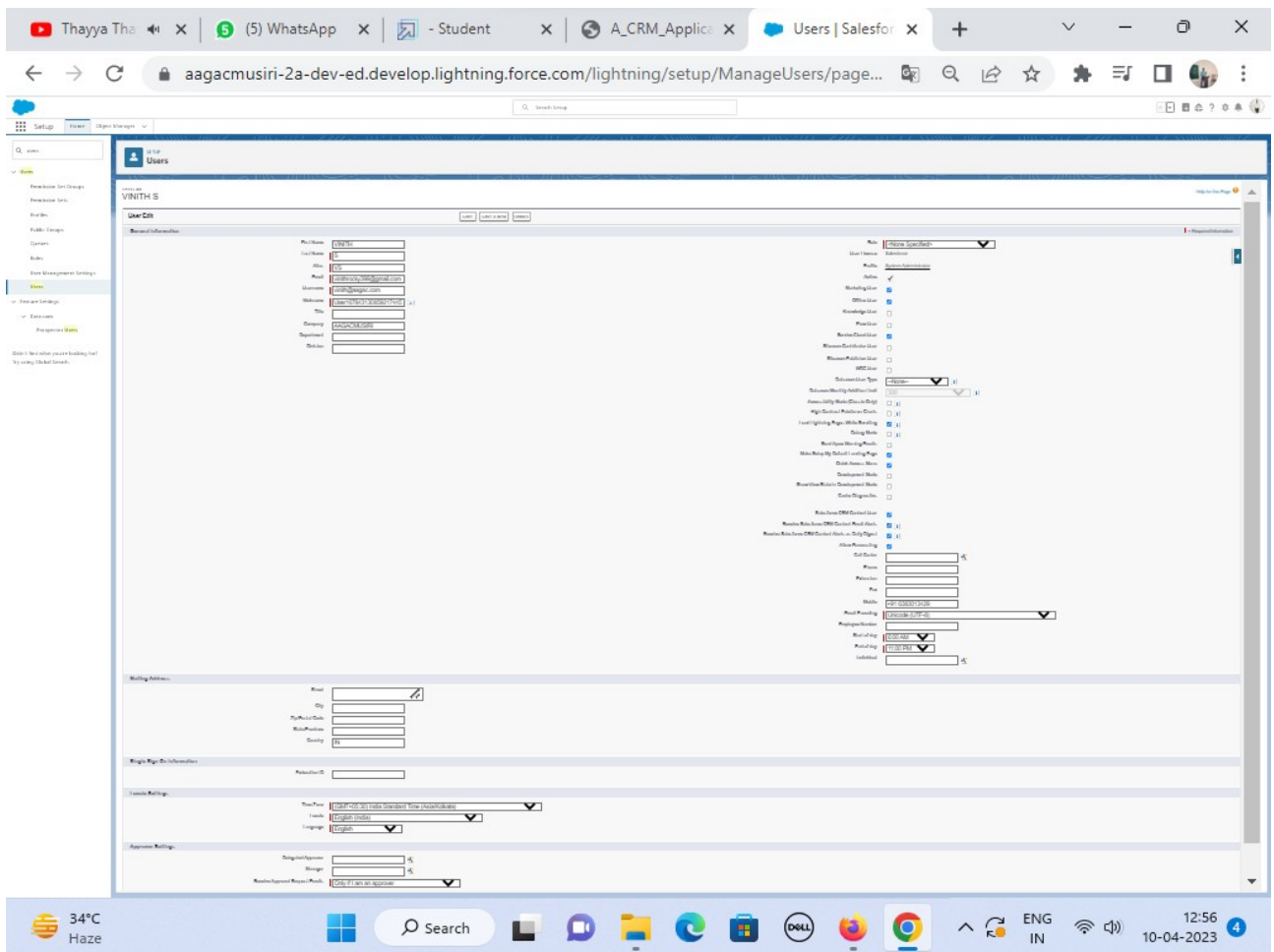
Milestone-5: Profile

Activity: Creation on profile:



Milestone-6: Users

Activity:



Milestone-7:Permission sets

Activity-1:

Uriyadi - M x (5) WhatsApp x - Student x A_CRM_Applic x Permission Sets x

aagacmusiri-2a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?add...

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Permission Sets

Permission Set: School

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name
School	School
License	Namespace Prefix
Session Authentication Required	Created By
Last Modified By	18/03/2023, 1:55 pm

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

[Learn More](#)

- 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**
Permissions to execute Flows
- Named Credential Access**
Permissions to authenticate against named credentials
- Custom Permissions**
Permissions to execute custom processes and apps
- Custom Metadata Types**
Permissions to execute custom metadata types
- Custom Settings Definitions**
Permissions to execute custom settings

System

Settings that apply across all apps, such as record and user management

[Learn More](#)

- System Permissions**
Permissions to perform actions that apply across apps, such as "Modify All Data"
- Service Providers**
Permissions for all users switch to other real-time using single sign-on

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Search

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Activity-2:

Uriyadi - M x (5) WhatsApp x - Student x A_CRM_Applic x Permission Sets x

aagacmusiri-2a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?add...

Search Setup

Setup Home Object Manager

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

Permission Set Assignments
VINITH S

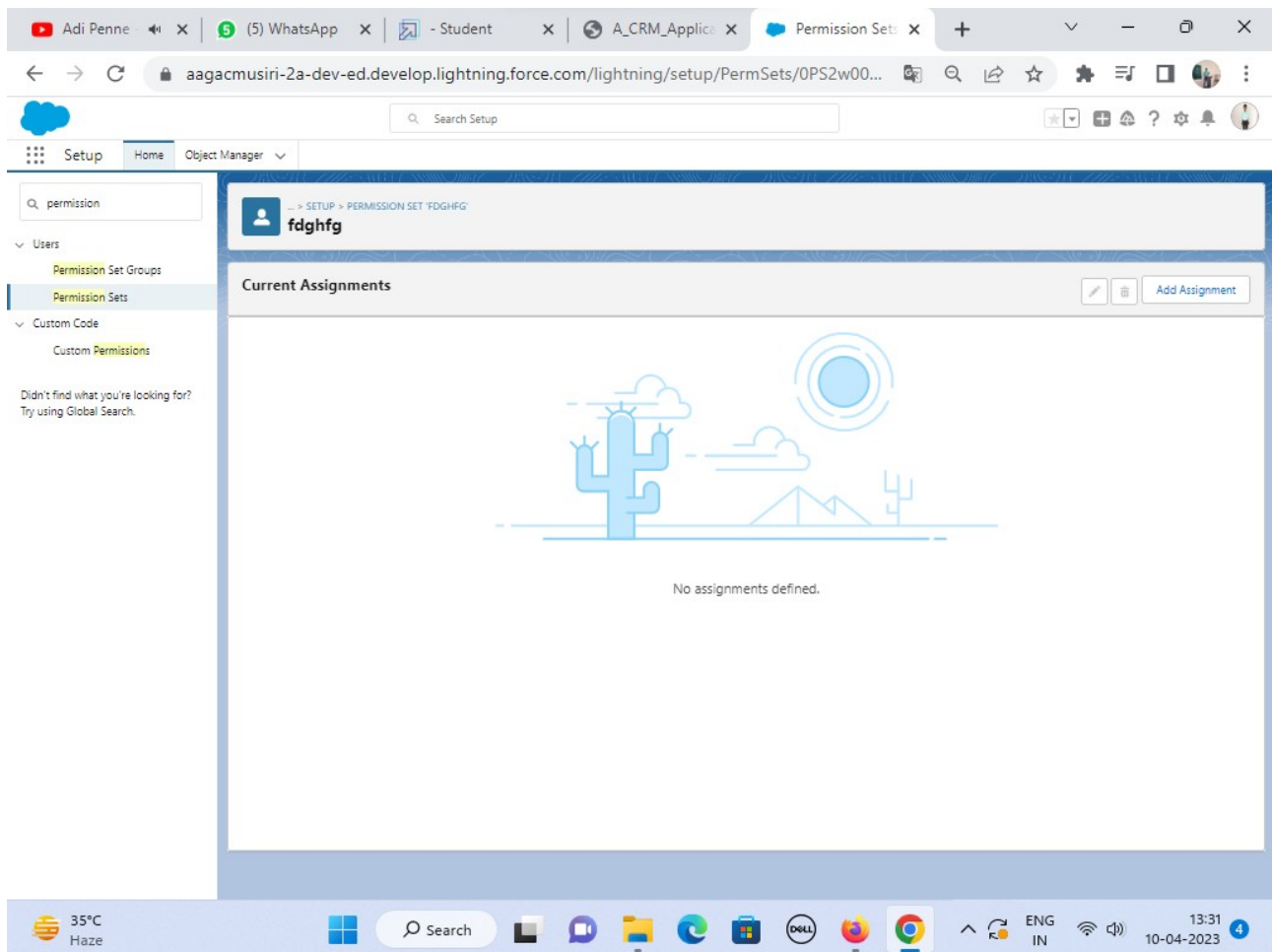
Save Cancel

Available Permission Sets		Enabled Permission Sets
Buyer	Add Remove	Experience Profile Manager
Buyer Manager		School
CRM User		
Commerce Admin		
Contact Center Admin		
Contact Center Agent		
Contact Center Supervisor		
Facility Manager		
FieldServiceMobileStandardPermSet		
Merchandiser		

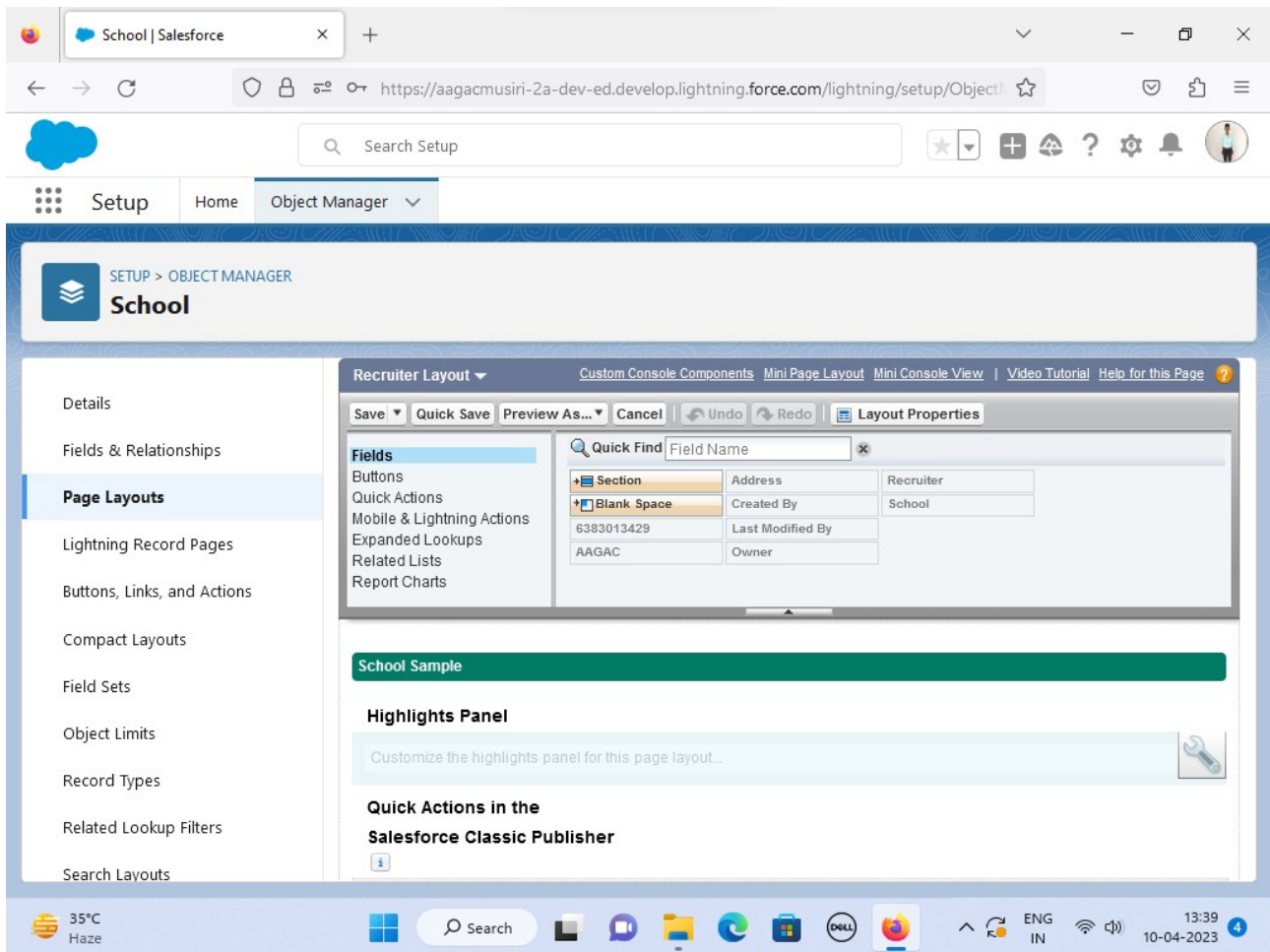
Save Cancel

Milestone-8:Reports

Activity:



The screenshot shows the Salesforce Lightning interface for managing permission set assignments. The top navigation bar indicates the current path: PERMISSION SET 'fdghfg' > MANAGE ASSIGNMENT EXPIRATION. The left sidebar contains navigation options: Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Select Users to Assign' and displays a list of users under the 'Recently Viewed' section. The list includes two users: Vinith S. and Vinith S. (both with the same email address: vinithrocy399@gmail.com). The interface also includes a search bar and a 'Cancel' button at the bottom.



4 Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/vsphy>

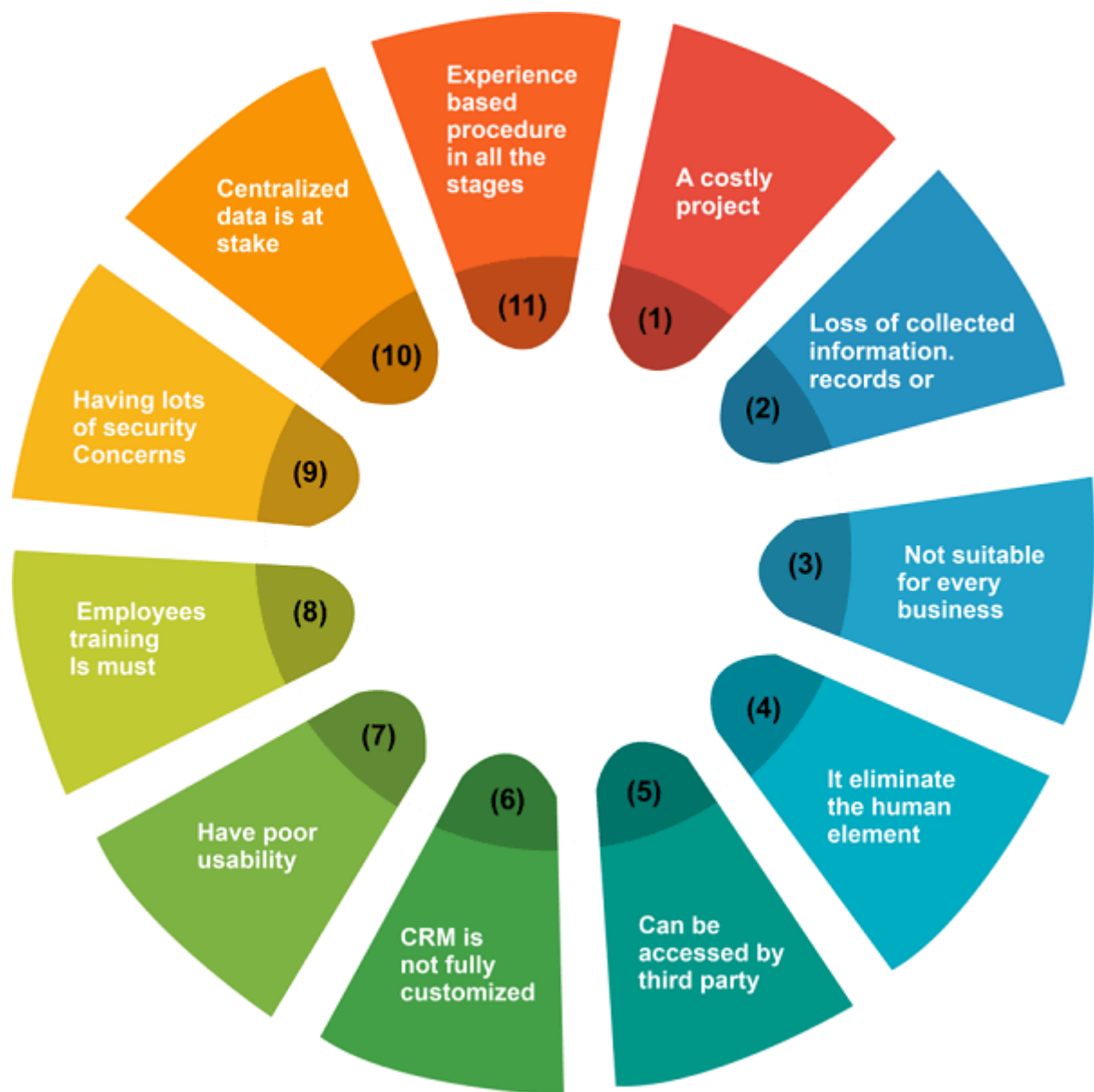
Team Member 1 - <https://trailblazer.me/id/gyphy>

5 ADVANTAGES & DISADVANTAGE

ADVANTAGES;



DISADVANTAGES;



6 APPLICATIONS ;

ADVERTISING

Advertising on right place for brand building and Consideration

- Listing of you School/College/University on Portal
- Banner Advertising on Portal
- Sponsor Social Media Posts
- Newsletter Inclusions
- Sponsor Video ad on YouTube

EDUCATION CRM

Centralises your Leads and convert into admissions

- Lead nurturing
- Lead Management
- User Management
- Reports and Analytics

EDUCATION CRM

Centralises your Leads and convert into admissions

- Lead nurturing
- Lead Management
- User Management
- Reports and Analytic

7 CONCLUSION ;

Conclusion

- CRM is a business philosophy based on trust and value
 - The core function of CRM is the value creation process
 - Customer relationships develop over time
 - The role of global salespeople in the process is that of both relationship builders and relationship promoters
 - CRM requires a cultural change with organizations.
 - The basic premise of CRM is to offer superior value to customers in an effort to turn prospects into customers, customers into loyal customers, and loyal customers into partners.
- It is essential to bear in mind that :
- "If you are not listening to your customers, your competitors will."

8 FUTURE SCOPE ;

* The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations

* The future has arrived — at least it has in the world of customer relationship management or [CRM software](#), one of the fastest growing categories of enterprise software. We are entering the era of intelligent, integrated CRM, and the future of CRM is even brighter. From small businesses to global enterprises, sales and marketing teams are adopting CRM to deliver better customer experiences, acquire and retain customers, and gain new customer-centric insights that are changing their companies for the better.

* [22](#)CRM systems might imply automation, but many only offer baseline automation options. The future of CRM will include users who demand more functionality. They'll be looking for providers that cover typical CRM essentials as well as more sophisticated automation.

23¹23