

PROJECT REPORT

1. INTRODUCTION

OVERVIEW:

WHAT IS CRM FOR EDUCATION?

Customer relationship management or [CRM software](#) enables educational institutions such as schools, colleges, and universities to manage relationships with students, parents, staff, alumni, and other stakeholders. It handles all aspects of the entire student lifecycle, from enrollment and academic progress tracking to fundraising management and reporting tools.

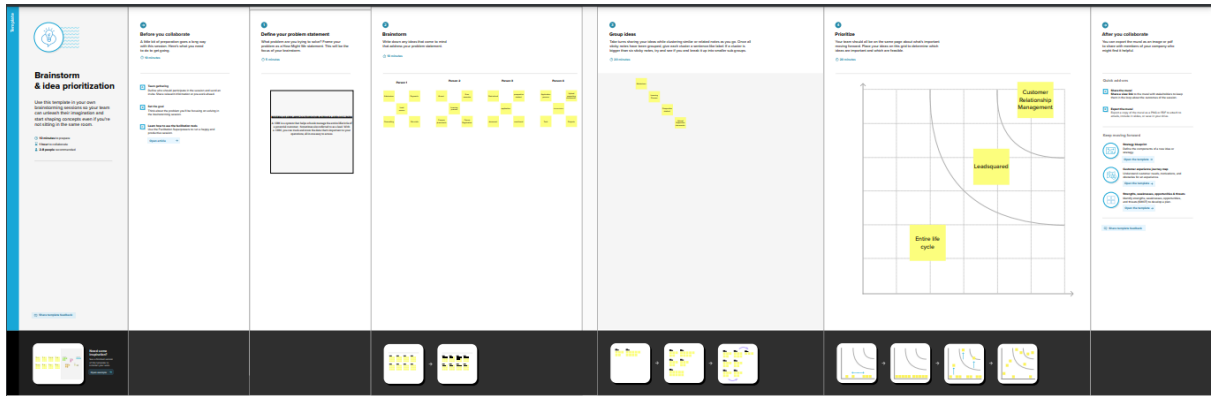
Some CRMs will integrate with other vital educational tools, such as learning management systems (LMS) and accounting software. In either case, the aim is to improve communication, efficiency, and, ultimately, student outcomes by equipping students, parents, and teachers with the necessary information.

PURPOSE:

- Tracking student interactions with your website, social media, or other online platforms enables you to deliver the right information to them at the right time.
- A CRM like monday sales CRM simplifies direct communication with departments, creating personalized content for outreach and providing the course-relevant information they seek.
- When a prospective student sends a message via the college website contact page or on social media, the CRM platform makes it easy for staff members to respond immediately.

- ## 2. PROBLEM DEFINITION & DESIGN THINKING





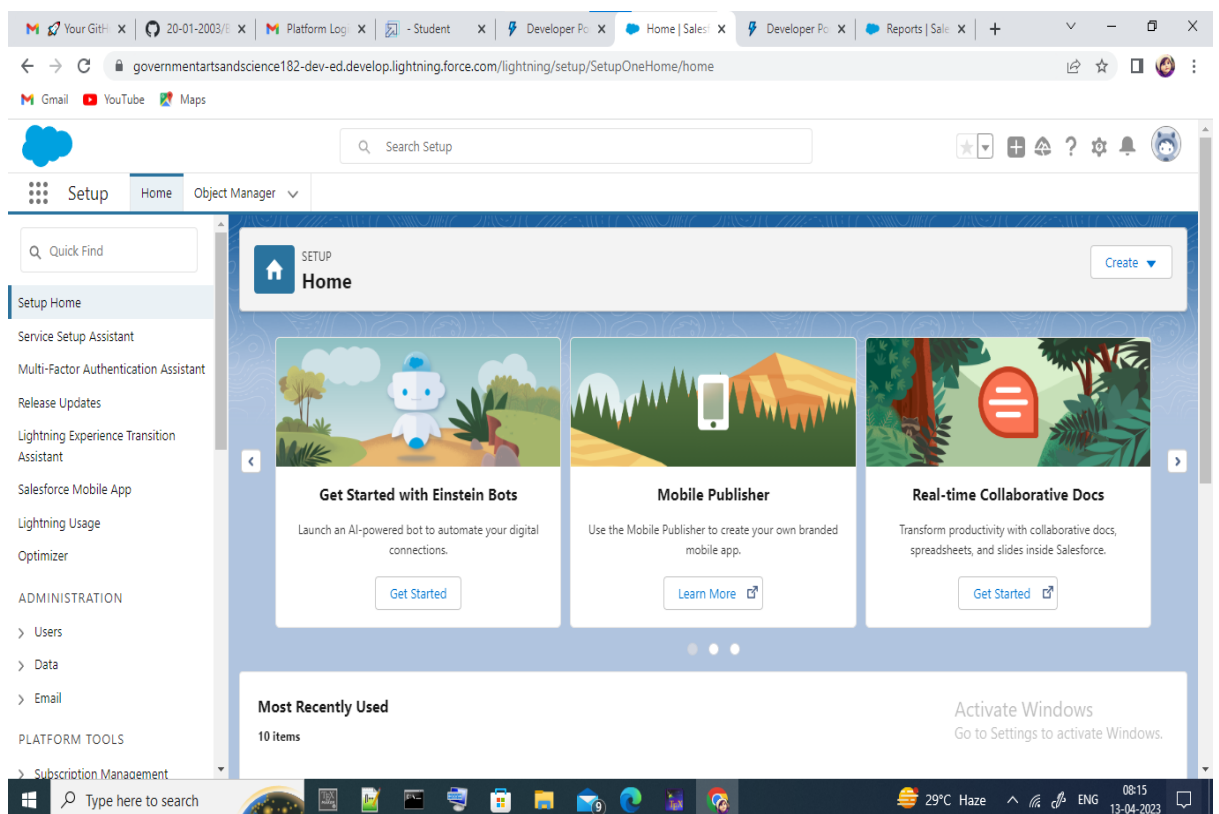
3. RESULT

DATA MODEL:

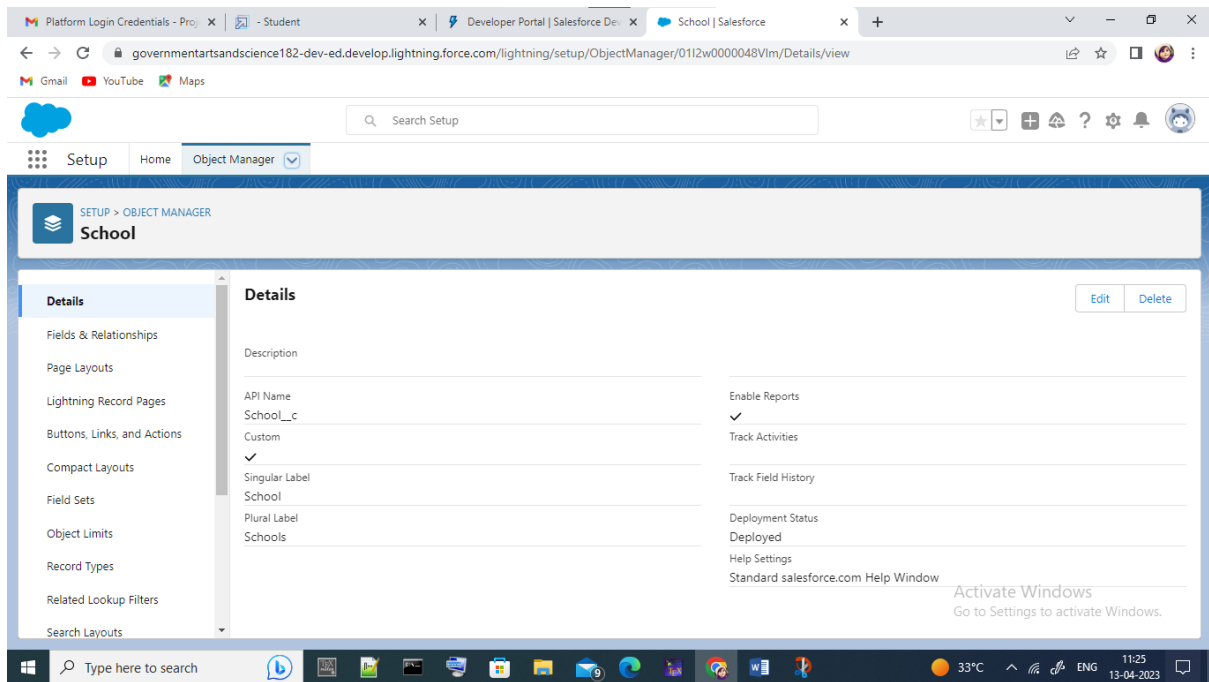
| OBOECT NAME | FIELDS IN THE OBJECT | |
|----------------|----------------------|----------------------------|
| School Object | | |
| | FIELD LABEL | DATA TYPES |
| | Phone number | Phone |
| | Number of Students | Roll-up summary |
| | Highest Marks | Roll-up summary |
| Student Object | | |
| | FIELD LABEL | DATA TYPE |
| | Phone | Phone Number |
| | School | Master-Detail Relationship |
| | Results | Picklist |
| | Class | Number |

| | | |
|---------------|--------------------|------------------|
| Parent Object | | |
| | FIELD LABEL | DATA TYPE |
| | Parent Address | Text Area |
| | Parent Number | Field |
| | | |

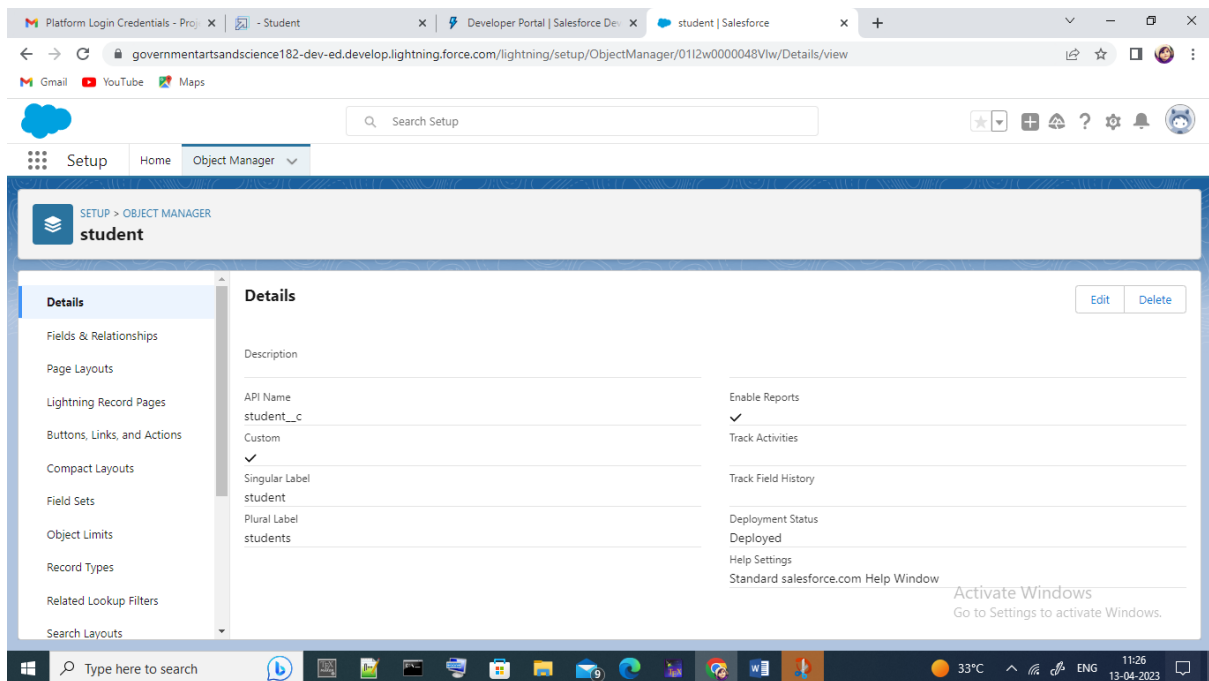
ACTIVITY & SCREENSHOT:



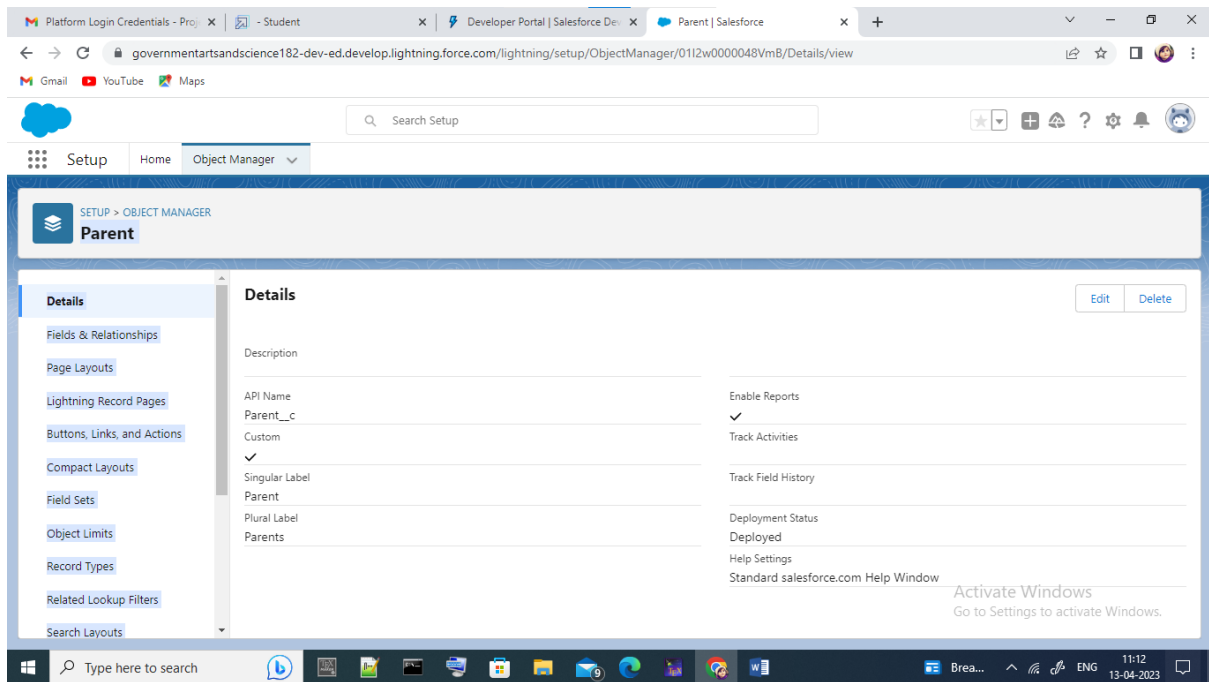
Creating salesforce developer account.



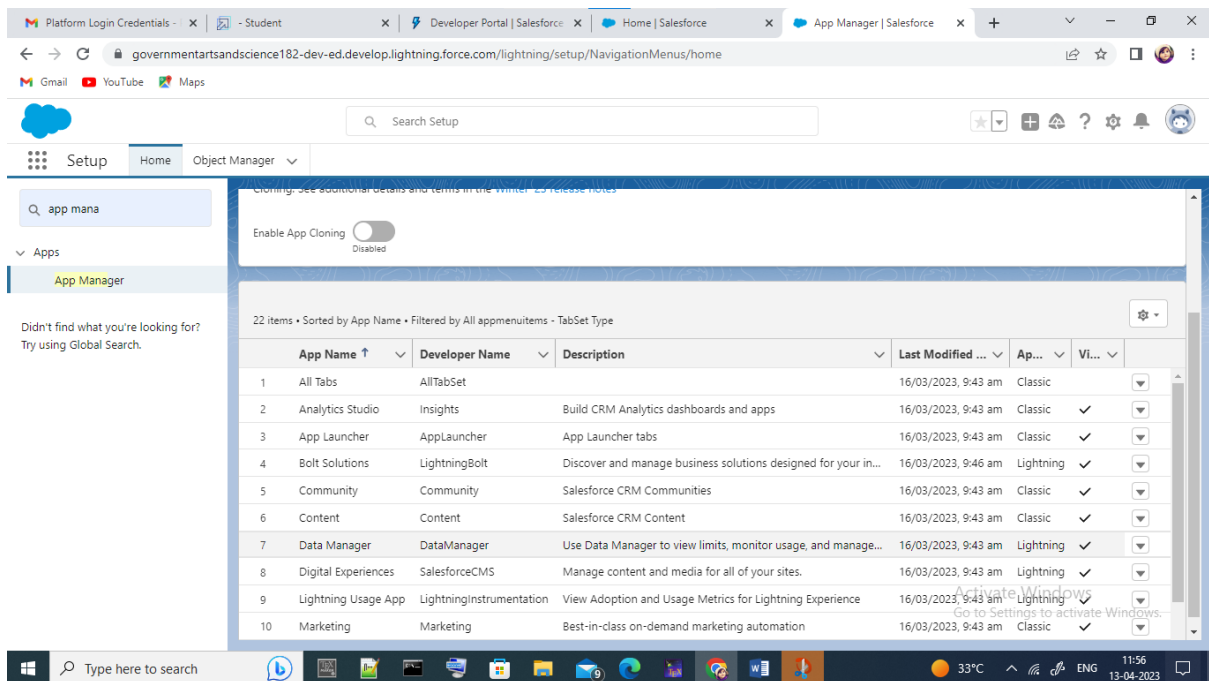
Creation of school object



Creation of student object



Creation of parent object



Creation of the school management app

The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays 'Fields & Relationships' for the 'School' object, showing 11 items sorted by Field Label. The table lists the following fields:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|--------------------|-----------------------|---------------------------------|-------------------|---------|
| Address | Address__c | Text Area(255) | | |
| Created By | CreatedById | Lookup(User) | | |
| District | District__c | Text Area(255) | | |
| Highest marks | Highest_marks__c | Roll-Up Summary (MAX student) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Number of Students | Number_of_Students__c | Roll-Up Summary (COUNT student) | | |
| Owner | OwnerId | Lookup(User,Group) | | |

At the bottom right, there is a notification: 'Activate Windows - Go to Settings to activate Windows.'

Creation of Fields for the school objects

The screenshot shows the Salesforce Setup interface for the 'student' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays 'Fields & Relationships' for the 'student' object, showing 8 items sorted by Field Label. The table lists the following fields:

| 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) | | |
| number | number__c | Number(18, 0) | | |
| Results | Results__c | Picklist | | |
| School | School__c | Master-Detail(School) | | |

At the bottom right, there is a notification: 'Activate Windows - Go to Settings to activate Windows.'

Creation of Fields for the student objects

Platform Login Credentials - x - Student x Developer Portal | Salesforce x Home | Salesforce x Parent | Salesforce x

governmentartsandscience182-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048Vm8/FieldsAndRelationships/view

Gmail YouTube Maps

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 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 | | |

Activate Windows
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Type here to search

33°C 12:02 13-04-2023

Creation of Fields for the parent objects

Platform Login Credentials - x - Student x Developer Portal | Salesforce x Home | Salesforce x Profiles | Salesforce x

governmentartsandscience182-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000s8ba%2Fe%3FretURL%3D%252F...

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Q profile

Users

Profiles

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

SETUP

Profiles

Profile Edit

school profile

Set the permissions and page layouts for this profile.

Profile Edit

Save Save & New Cancel

Name school profile

User License Salesforce

Custom Profile ☒

Description

Custom App Settings

| | Visible | Default | | Visible | Default |
|---------------------------------------|-------------------------------------|-----------------------|---|-------------------------------------|-----------------------|
| All Tabs (standard__AllTabSet) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales (standard__Sales) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Analytics Studio (standard__Insights) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales Console (standard__LightningSalesConsole) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| App Launcher (standard__AppLauncher) | <input checked="" type="checkbox"/> | <input type="radio"/> | Salesforce Chatter (standard__Chatter) | <input checked="" type="checkbox"/> | <input type="radio"/> |

Activate Windows
Go to Settings to activate Windows.

Type here to search

33°C 11:44 13-04-2023

Creation on Profile

Setup Home Object Manager

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

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|------------------|---------|---|------|--------|----------------------------------|
| Edit | Chatter Expert | Chatter | chatty.00d2w00000r9y8eal.sfc3zqbv42g@chatter.salesforce.com | | ✓ | Chatter Free User |
| Edit | M. Baby | bm | babymurugesan201@gmail.com | | ✓ | Standard Platform User |
| Edit | S. Ilayavani | IS | ilayavanisakar2003@gmail.com | | ✓ | System Administrator |
| Edit | User Integration | integ | integration@00d2w00000r9y8eal.com | | ✓ | Analytics Cloud Integration User |
| Edit | User Security | sec | insightssecurity@00d2w00000r9y8eal.com | | ✓ | Analytics Cloud Security User |

New User Reset Password(s) Add Multiple Users

Activate Windows
Go to Settings to activate Windows.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Creation of the users

Reports

Recent

1 item

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 | Ilayavani S | 11/4/2023, 7:32 pm | |

Created by Me Private Reports Public Reports All Reports

FOLDERS

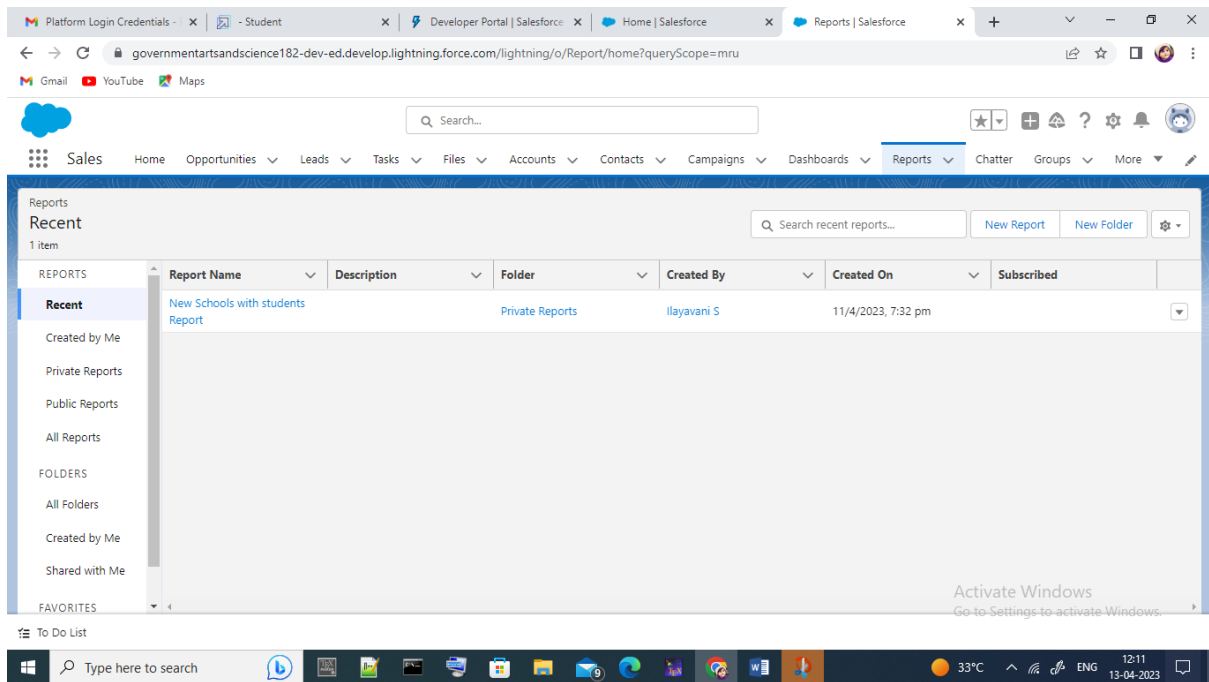
All Folders Created by Me Shared with Me

FAVORITES

To Do List

Activate Windows
Go to Settings to activate Windows.

Creation of permission sets



Report

4. TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD - <https://trailblazer.me/id/babym9>

TEAM MEMBER 1 – <https://trailblazer.me/id/ivani44>

TEAM MEMBER 2 - <https://trailblazer.me/id/llogeshwari2>

TEAM MEMBER 3 - <https://trailblazer.me/id/ssambasivam7>

5. ADVANTAGES & DISADVANTAGES

| ADVANTAGES | DISADVANTAGES |
|--|--|
| It allows for the consolidation of customer data and the basis for deep insights. | Customer experience may worsen due to staff over-reliance on the system. |
| It speeds up the sales conversion process | <ul style="list-style-type: none">• Security and data protection issues with centralised data. |
| It increases staff productivity, lowering time-cost. | The excess initial time and productivity cost at the implementation. |
| It allows geographically dispersed teams to collaborate effectively. | Requires a process-driven sales organisation. |
| Improves customer experience by allowing personalisation and improved query resolution | CRM may not suit all businesses. |

6. APPLICATIONS

Create a **Smooth and Simple Admission Process** from collecting the **student inquiries** to **completing the admission** with lots of automation. You can add & manage all the related documents, convert a student inquiry to prospects, perform much more automation & automatically nurture them to admissions using the **Best CRM for Educational Institutions & Training Institutes**.

7. CONCLUSION:

CRM for higher education plays an important role in the automation of the institute's communication and processes. It helps them to connect with the interested and talented students who are seeking courses and programs based on their interests, affordability, and other parameters. Also, it reduces the manual tedious processes and improves the efficiency of the employees working there.

8. FUTURE SCOPE:

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.