

PROJECT REPORT

A CRM APPLICATION FOR SCHOOLS OR COLLEGES

1.INTRODUCTION

1.1 OVERVIEW

- Our project is about how we have to help to maintain and manage the school or college related problems. A CRM Application for schools or colleges management software is a specialized tool designed to manage and track student interactions, data and automate tasks related to student recruitment, enrollment and retention.
- This technology helps the schools or colleges management to manage their relationships with students and parents and it can be a powerful tool for increasing the admission also.
- A CRM Application is designed to streamline the administrative and academic processes and integrate them into a centralized system.
- It provides a 360-degree view of each and every student academic details.
- It provides the interaction facility for the students,

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parents, faculty and staff in a single platform and making the interaction so easy and then build a strong community.

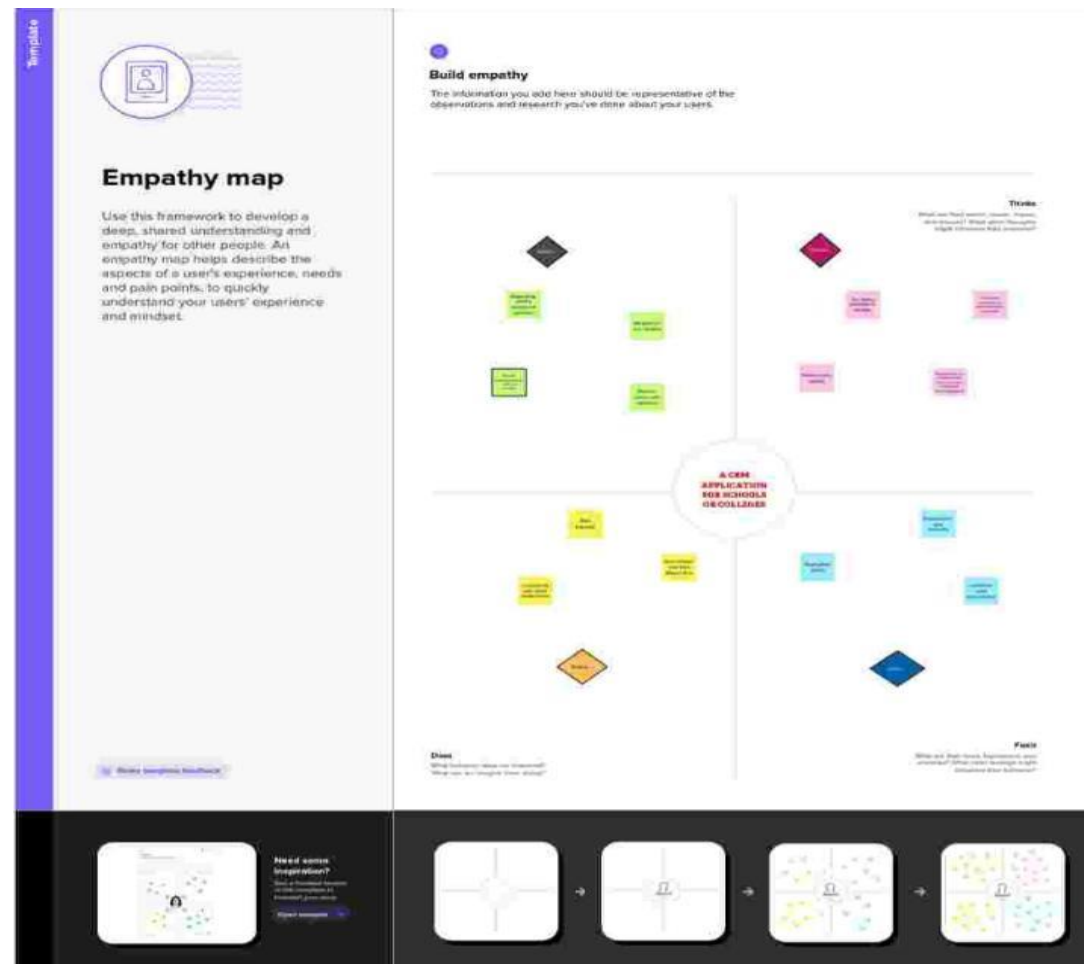
- This application is very helpful in this competitive world to get profit and success.

1.2 PURPOSE

- A CRM application can help educational organizations effectively manage and track leads, resulting in improved numbers.
- It can help by personalizing communications and providing automated follow-up, educational organization can build better relationships with students and leads and keep them engaged over time.
- A CRM system can improve the communications between different departments within an organization and help to increase efficiency and productivity.
- It is an essential tool for educational organization to improve enrollments, lead management, communication and student engagement.

2.PROBLEM DEFINITION AND DESIGN THINKING

2.1 Empathy Map



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2.2 IDEATION AND BRAINSTORMING MAP



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3 RESULTS

3.1 DATA MODEL

Object name	Fields in the Object	
SCHOOL OBJECT		
	Field label	Data type
	Address	Text area
	District	Text area
	State	Text area
	School websites	Text area
	Phone number	Phone
	Number of students	Roll-up summary
	Highest marks	Roll-up summary
STUDENT OBJECT	Field label	Data type
	Phone number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number
Object name	Fields in the object	

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PARENT OBJECT		
	Field label	Data type
	Parent address	Text area
	Parent Number	Phone

3.2 ACTIVITY AND SCREENSHOT

Milestone-1:

Activity: Creating Developer Account

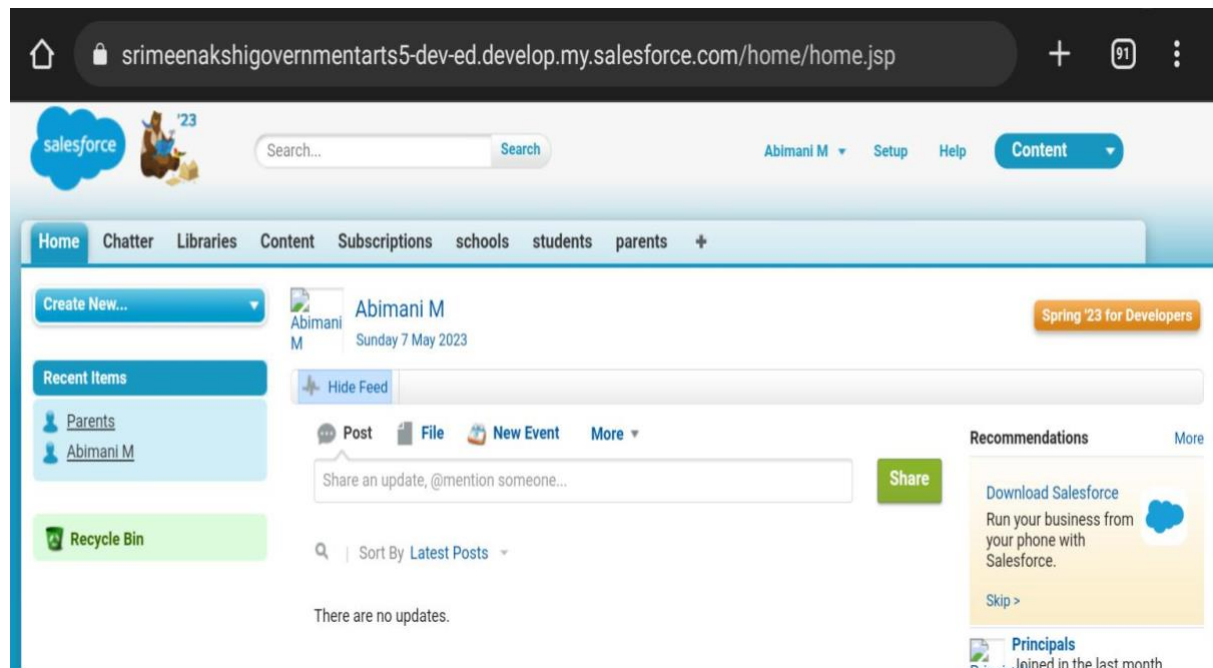
Creating Developer Account

Creating a developer org in salesforce

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer
 - c. Company : College Name
 - d. County : India
 - e. Postal Code : pin code
 - f. Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com

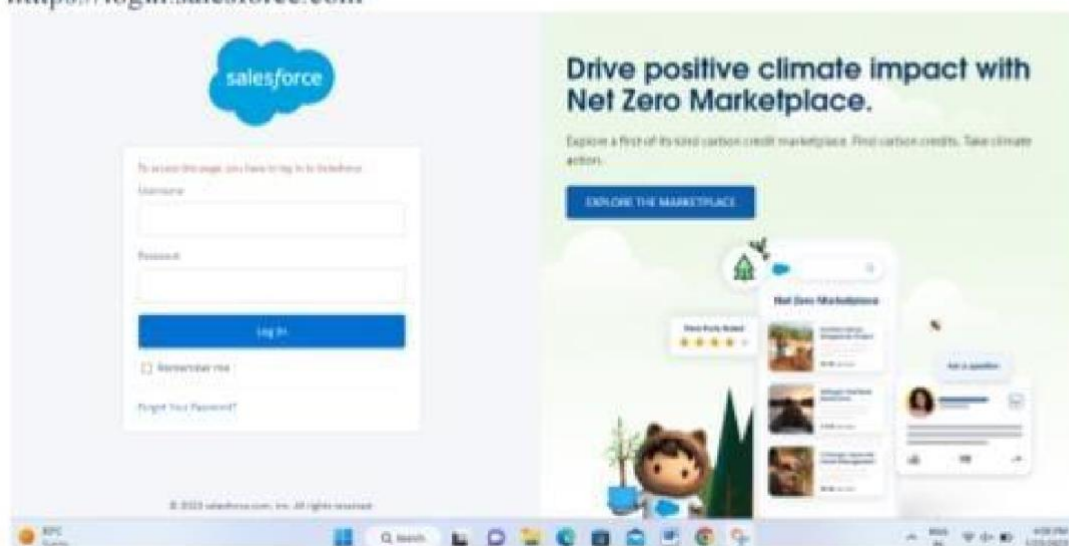
Click on sign up after filling these

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Salesforce Login

<https://login.salesforce.com>



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Milestone -2: Object

Salesforce objects are **database tables that permit you to store data that is specific to an organization**. Salesforce objects are of two types: Standard objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards etc.

Activity-1: Creation of school object

Creation of objects for School Management:

For this school management we have to create the three objects i.e., school, parents and students. The below steps will assist you in creating those objects.



1.click on the gear icon and then select setup

2.Click on the object manager tab just beside the home tab.

3.After the above, have a look on the extreme right you will find the **create** click on that and select **custom object**.

On the Custom object Definition page, create the object as follows:

Label: School

Plural Label: Schools

Record Name: School Name

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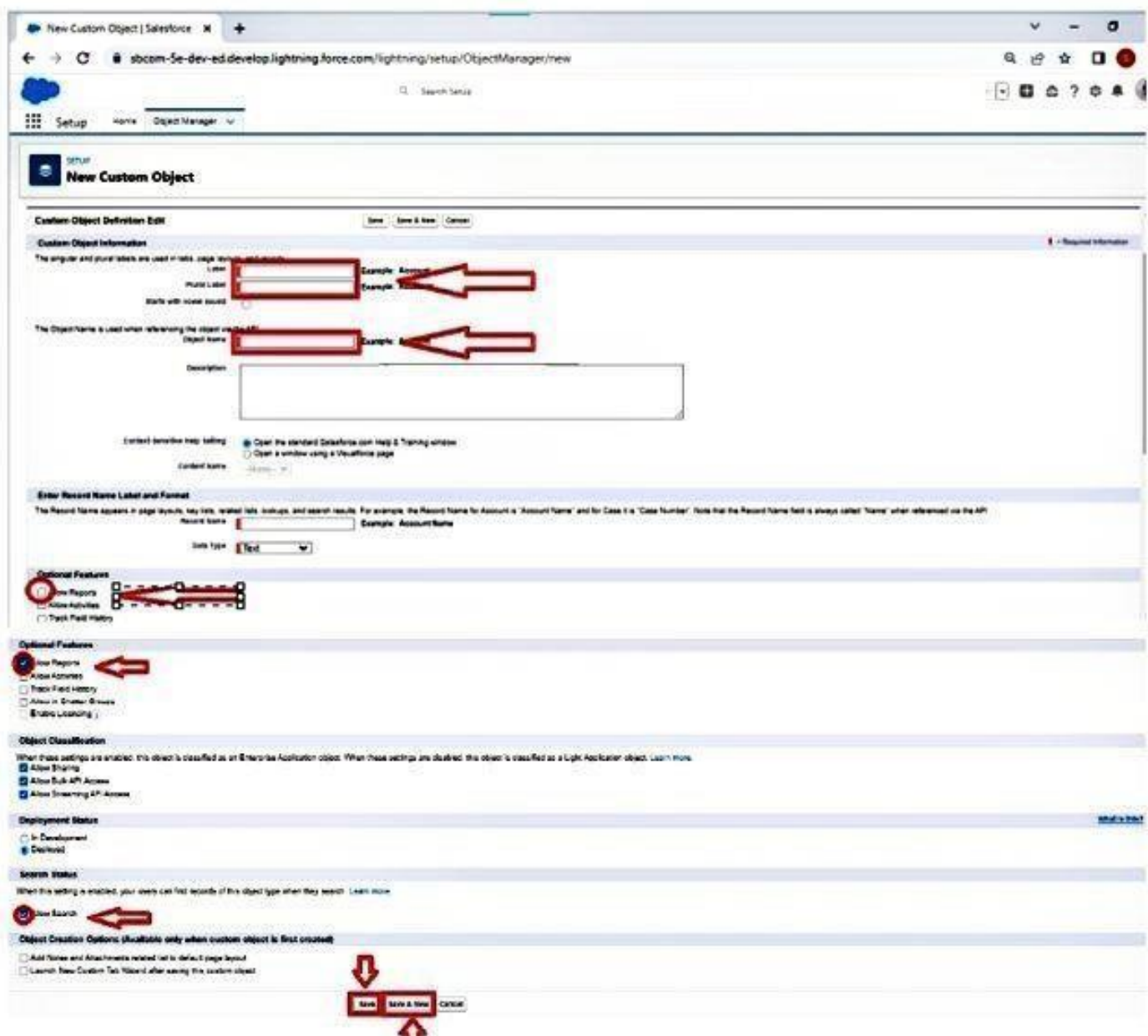
Check the Allow Reports checkbox

Check the Allow Search checkbox

Click Save.



After clicking you have this



New Custom Object | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in table, page headers, and search results.

Label: Example: Account

Plural Label: Example: Accounts

The object name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Content Service Help Setting: ☒ Open the standard Salesforce.com Help & Training window

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: AccountName

Field Type:

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Stream Groups

☐ Enable Linking

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, the object is classified as a Light Application object. Learn more.

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

☒ Allow Search

Object Creation Options (available only when custom object is first created)

☐ Add Name and Attachments related list to default page layout

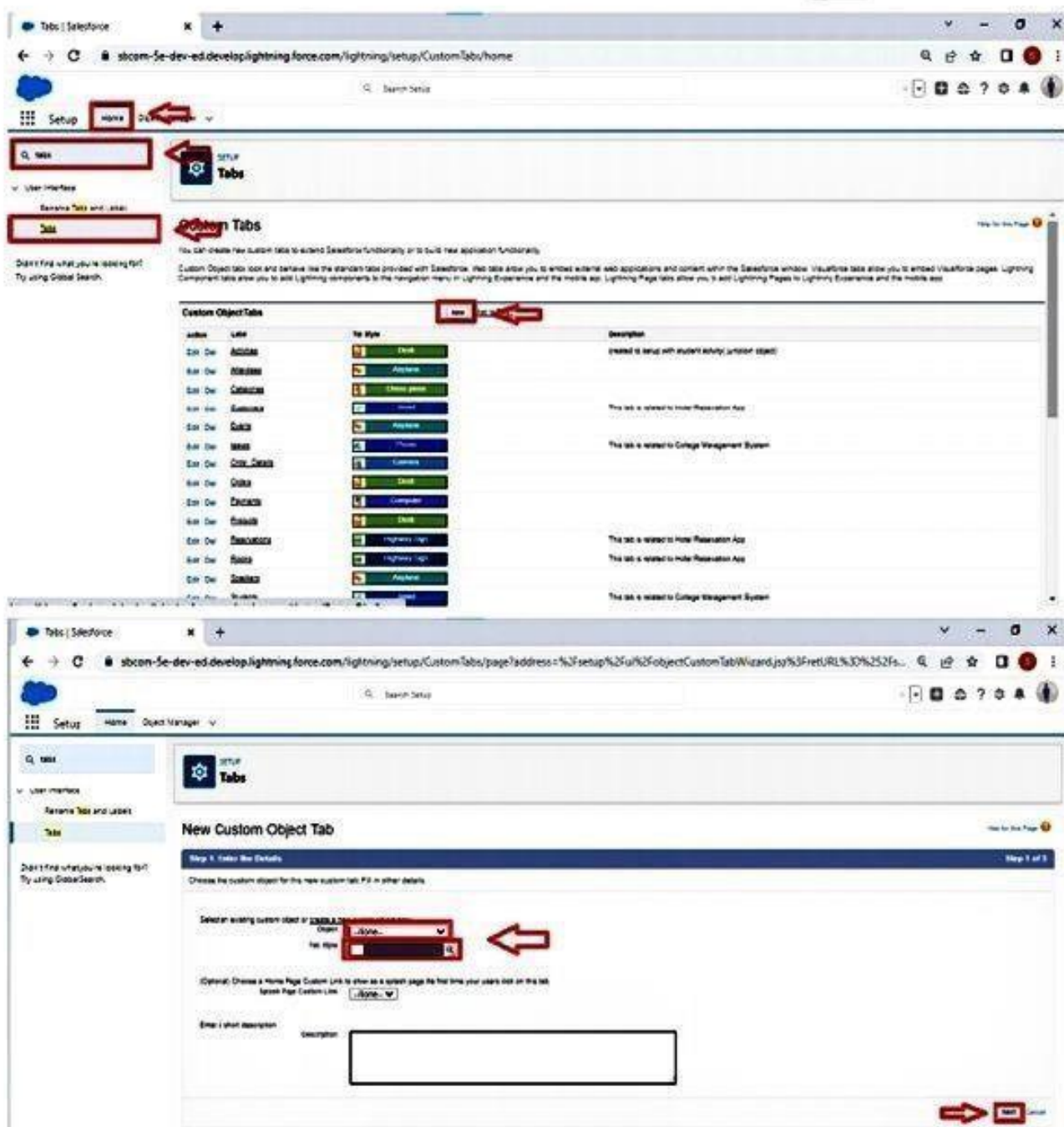
☐ Launch New Custom Tab Wizard after saving the custom object

Save Mark & New Cancel

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Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select tabs. Under custom object tabs, click New.

1. For Object, select School.
2. For Tab style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



The first screenshot shows the Salesforce Setup page at `sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The 'Home' tab is selected in the top navigation bar. In the left sidebar, 'Setup' is highlighted, and 'Tabs' is selected under 'User Interface'. The 'Custom Object Tabs' section is expanded, and the 'New' button is highlighted with a red box and an arrow.

The second screenshot shows the 'New Custom Object Tab' wizard at `sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.js%3FretURL%3D%252F...`. The 'Step 1: Select New Details' section is active. The 'Select an existing custom object or standard object' dropdown is set to 'School', and the 'Tab Style' dropdown is set to 'Visualforce page'. The 'Next' button is highlighted with a red box and an arrow.

click save and the school object is created.

In the same way you can create the student and parent object.

Activity 2: Create student object

1.Click on the gear icon and then select setup.

2.Click the object manager.

3.Click on the create that is on the extreme right and select custom object.

- **On the Custom object Definition page, create the object as follows.**
- **Label: Students**
- **Plural Label: Students**
- **Record Name: Student Name**
- **Check the Allow Reports checkbox**
- **Check the Allow search checkbox**
- **Click save.**

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select tabs. Under custom object tabs, click New.

1.For Object, select Students.

2.For Tab style, select any icon.

3.Leave all defaults as is. Click Next, Next and Save.

Activity 3 : Create parent object

- 1.Click on the gear icon and then select setup.**
- 2.Click the object manager.**
- 3.Click on the create that is on the extreme right and select custom object.**
 - On the Custom object Definition page, create the object as follows.**
 - Label: Parent**
 - Plural Label: Parents**
 - Record Name: Parent Name**
 - Check the Allow Reports checkbox**
 - Check the Allow search checkbox**
 - Click save.**

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select tabs. Under custom object tabs, click New.

- 1.For Object, select Parents.**
- 2.For Tab style, select any icon.**
- 3.Leave all defaults as is. Click Next, Next and Save.**

Milestone - 3: Lightning App

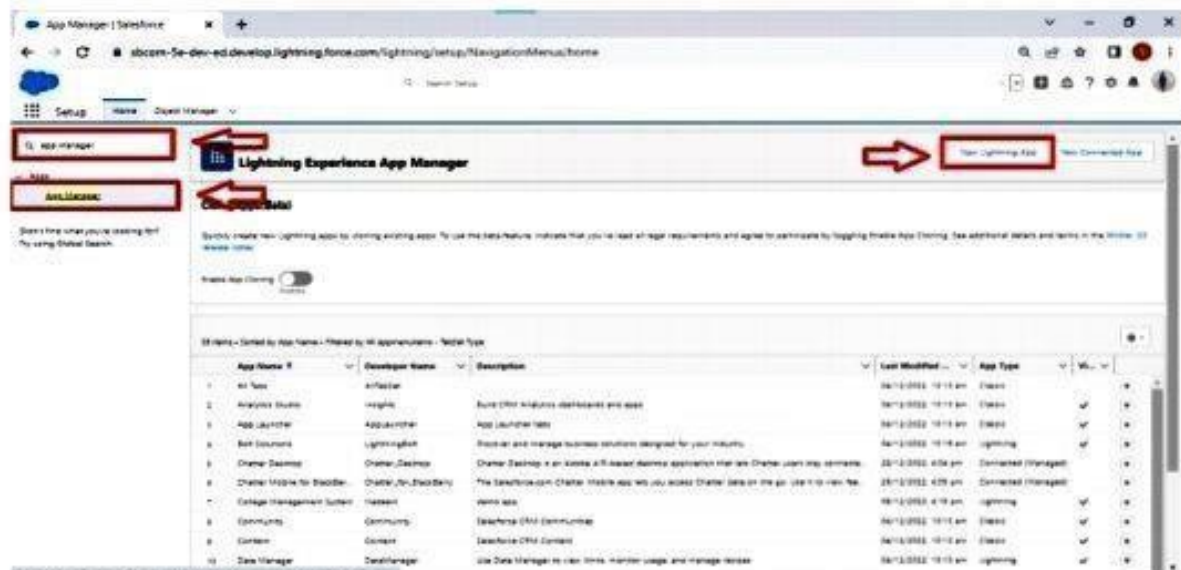
Apps in salesforce are a group of tabs that helps the application function by working together as a unit. It has a logo, a name and a particular set of tabs. The simplest app usually has just two tabs

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Activity:

Create the School Management App

- From the setup, enter App Manager in the Quick Find



and select App Manager



- Click New lightning App. Enter School Management as the App Name , then click Next.
- Under App options, leave the defaults selection and click next.
- Under utility items, leave as is and click Next.
- From the available items, select schools, students. Parents, Reports and

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Dashboards and move them to Selected Items and click Next.



- From Available profiles, select System Administrator and move it to Selected profiles. click save and finish.



- To verify the changes, click the App launcher, type School Management and select the School Management app. After done all the above procedure you got

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Milestone-4: Fields and relationships

An object relationship in salesforce is a two way association between two objects.

Relationship are created by creating custom relationship fields on an object. This is due so that when users view records, they can also see and access related data.

Activity-1:

Creation of fields for the school object

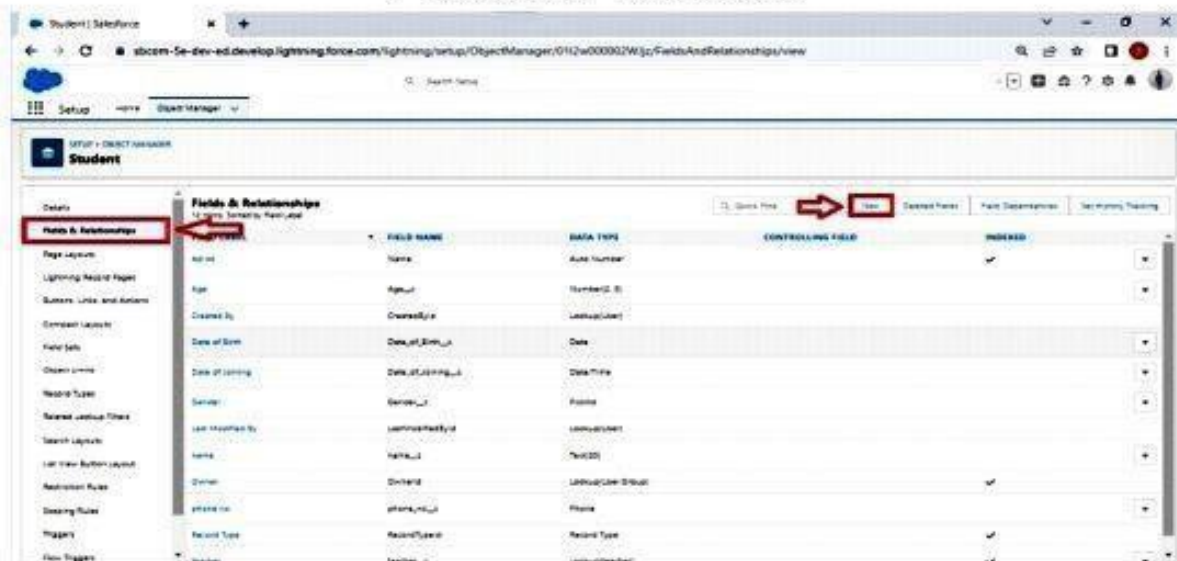
1. Click the gear icon and select setup.
2. Click the object manager next to home tab.



3. Select School.

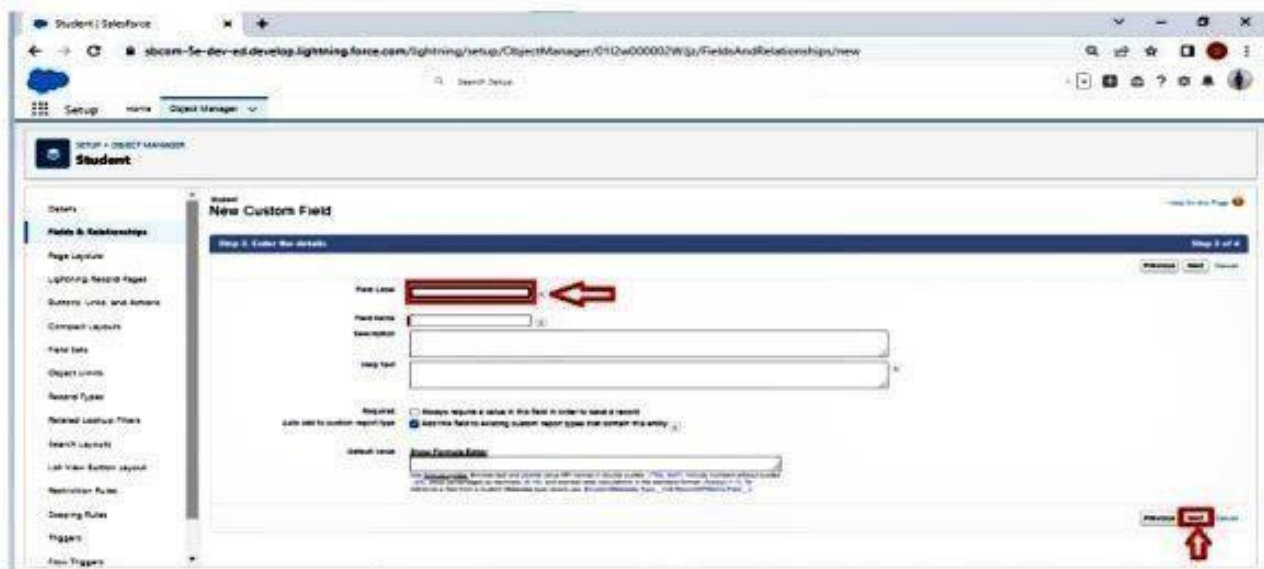
4. Select the fields and relationship from the left navigation and click New.

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Now we have to make a custom fields.

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Address.
3. Click Next, Next, then Save & New.
4. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field labels.



Now let's create the other fields.

Lets see this

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

Lets create Roll-up summary fields to calculate the number of students

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.

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3. Select the Roll-up summary field as data type
4. Enter the field label as Number of students
5. Click Next
6. Then select the master object summarized as students and then select count as roll-up and then click Next, Next and save.
1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Highest Marks
5. Click Next
6. Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate. click Next, Next and save.

Activity-2:

Creation of fields for the Student objects:

1. Select the Phone as the Data Type, then click Next.
 2. For Field Label, enter Phone Number.
 3. Click Next, Next, then Save & New
- Let's create a master-detail relationship with school object
1. Select Master-Detail Relationship as the Data Type and click Next.
 2. For Related to, enter School.
 3. Click Next.
 4. For Field Label, enter School.
 5. Click Next, Next, Next and Save.

Let create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
6. Pass
7. Fail
8. Click Next, Next, then Save & New

Lets create a Number field:

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

Activity-3:

Creation of fields for the Parent objects:

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.
4. Select the Phone as the Data Type, then click Next.
5. For Field Label, enter Parent Number.

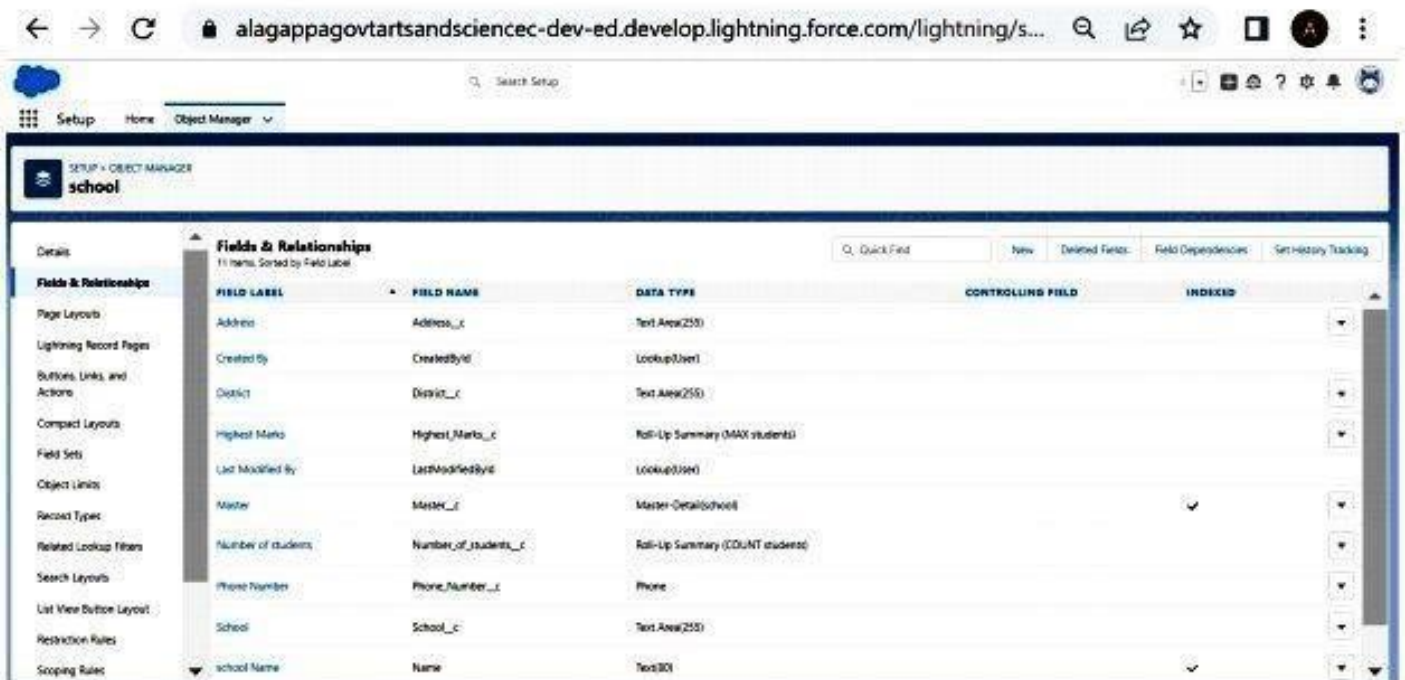
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6. Click Next, Next, then Save & New

After done the above procedure you got the below results

Activity-1

Creation of fields for the school object



alagappagovtartsandscienceec-dev-ed.develop.lightning.force.com/lightning/s...

Setup Home Object Manager

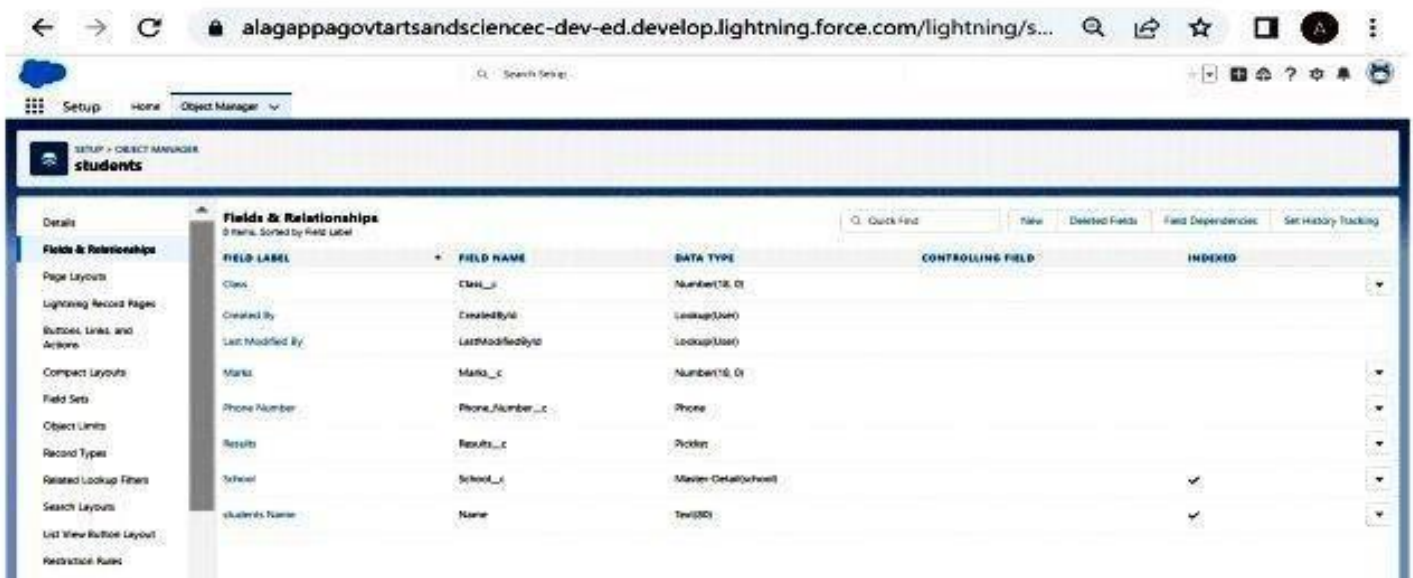
school

Details Fields & Relationships 11 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedBy	Lookup User		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX students)		
Last Modified By	LastModifiedBy	Lookup User		
Master	Master__c	Master-Detail(school)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT students)		
Phone Number	Phone_Number__c	Phone		
School	School__c	Text Area(255)		
school Name	Name	Text(30)		

Activity-2

Creation of fields for the student object



alagappagovtartsandscienceec-dev-ed.develop.lightning.force.com/lightning/s...

Setup Home Object Manager

students

Details Fields & Relationships 8 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedBy	Lookup User		
Last Modified By	LastModifiedBy	Lookup User		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(school)		
student's Name	Name	Text(30)		

Milestone -5: Profile

A profile is a **group/collection of settings and permissions that define what a user can do in**

salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab

settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types,

Login hours & Login IP ranges

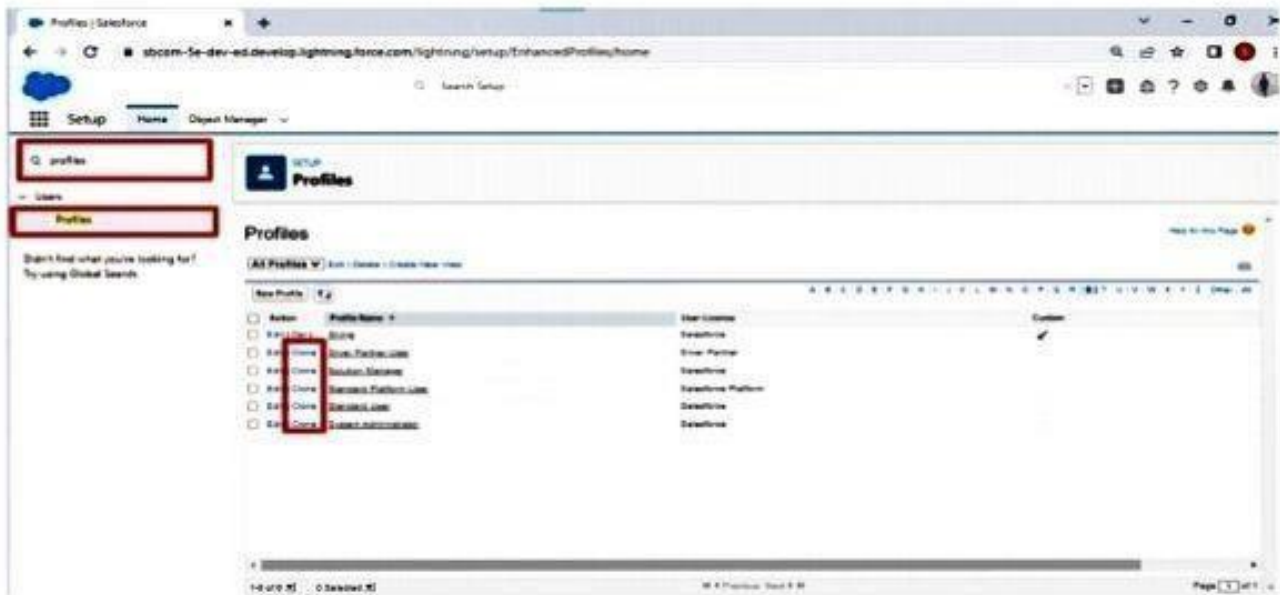
Activity:

Creation on profile:

From Setup enter Profiles in the Quick Find box, and select Profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.

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3. For Profile Name, enter School profile

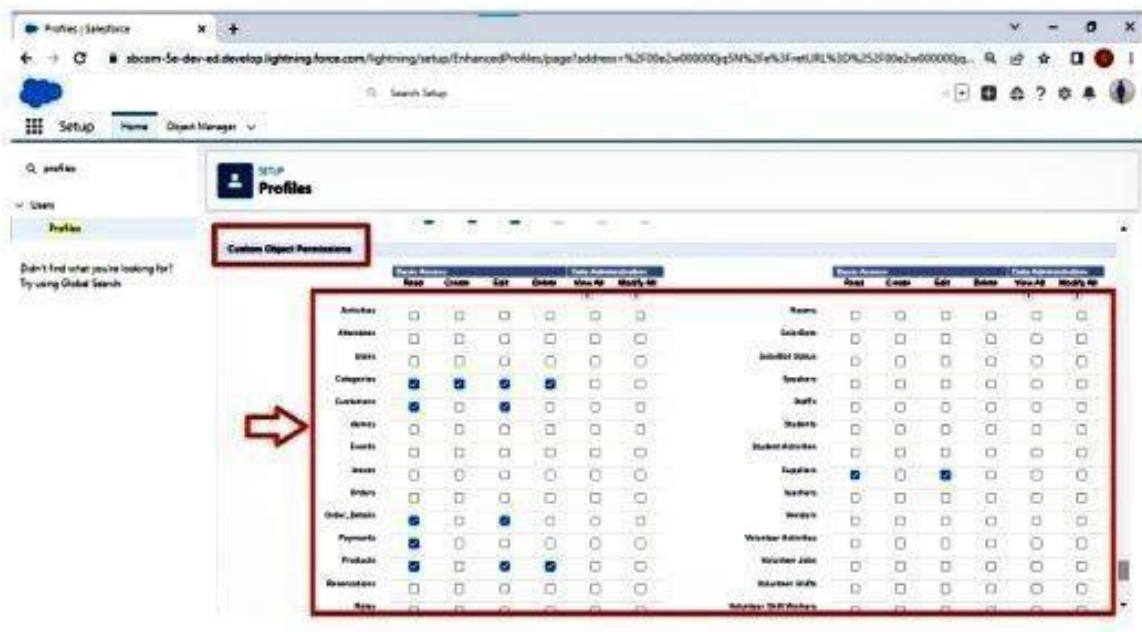


4. Click Save.

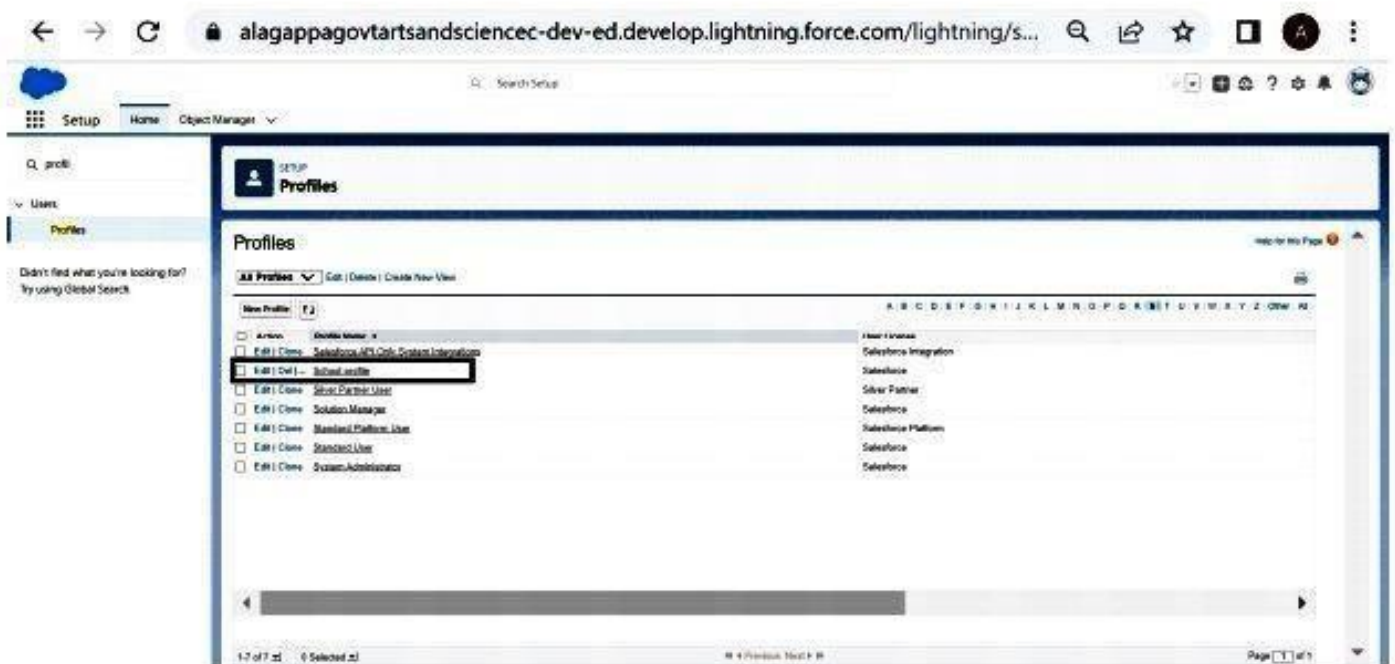
5. While still on the School profile page, then click Edit.

6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

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After doing all the above step my result is MY PROFILE



Milestone-6: Users

A user is **anyone who logs in to Salesforce**. Users are employees at your company, such as sales

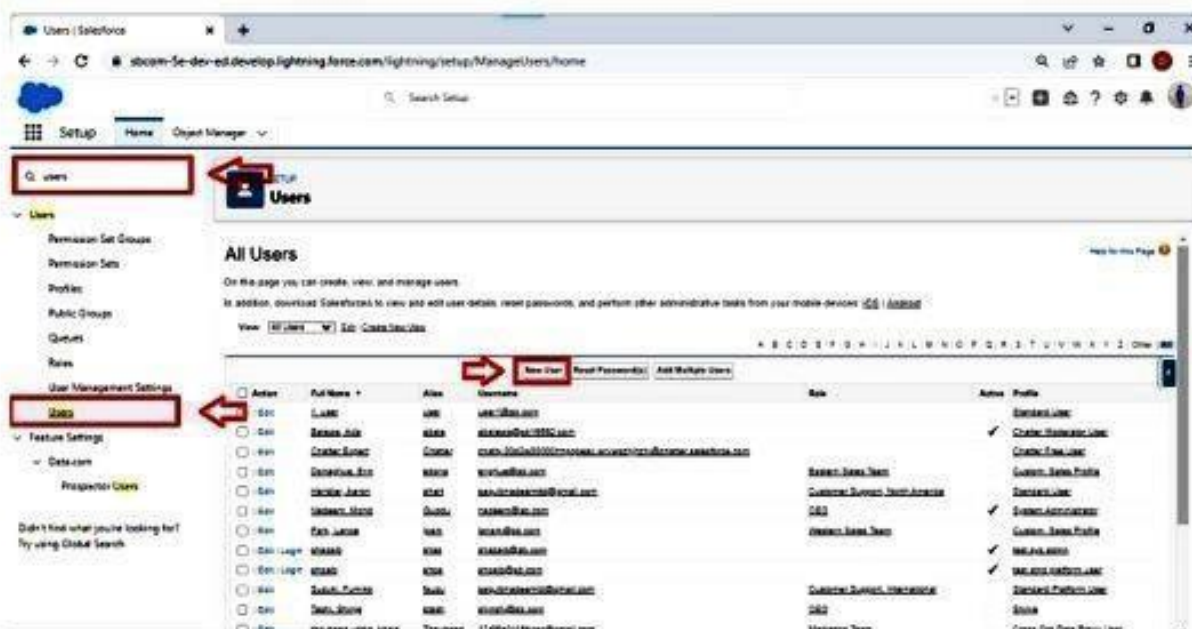
reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity:

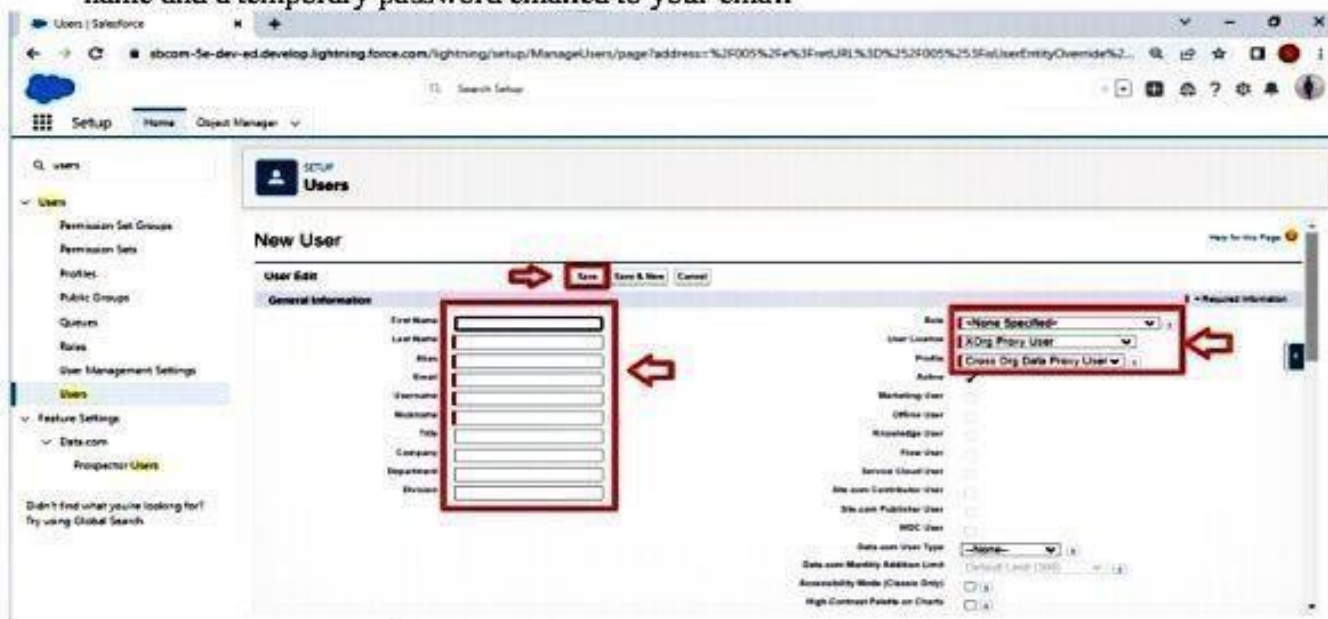
Creating Users :

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1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.



3. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a User License As salesforce.
5. Select a profile as a School profile.
6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email



7. Similarly follow the above steps and create 3 users as Teachers and principals

Milestone-7: Permission sets

A permission set is a collection of settings and permissions that give users access to various tools

and functions. Permission sets extend users' functional access without changing their profiles.

Activity-1:

Permission sets 1:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.

Permission Sets | Salesforce

blccam-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

permission sets

Users

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.

(All Permission Sets) Edit | Delete | Create New View

New

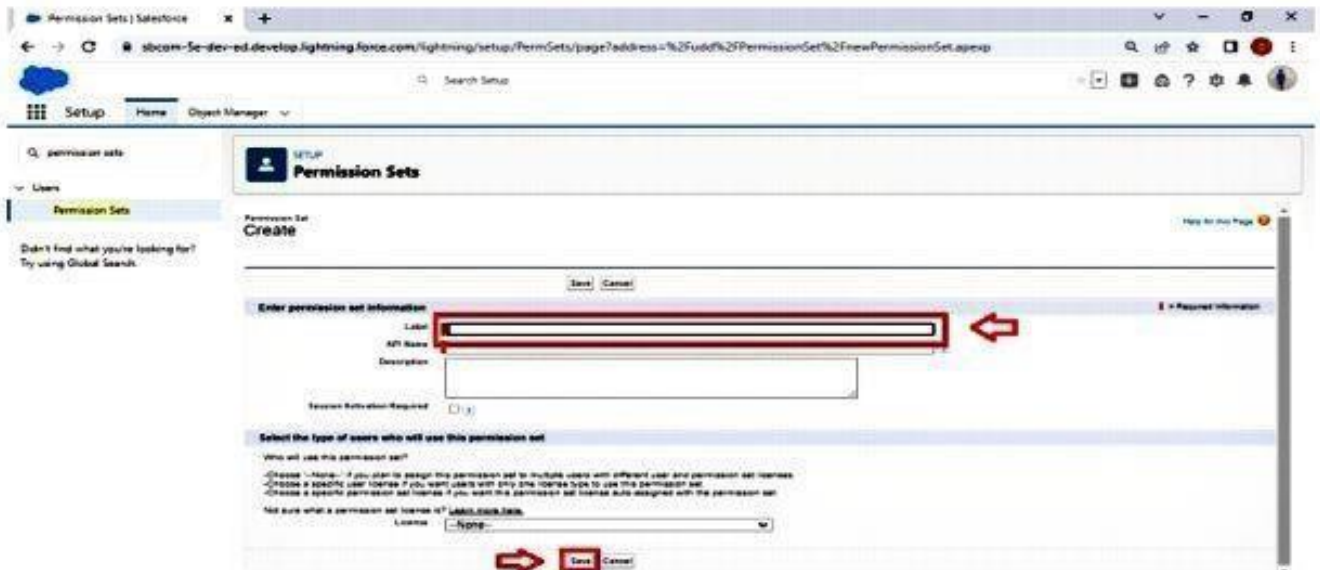
Action	Permission Set Label	Description	License
<input type="checkbox"/> Only Clone	Business Portal		
<input type="checkbox"/> Clone	Book	Grants access to the work. Lets users test products and categories.	S2B Buyer Permission Set One Test
<input type="checkbox"/> Clone	Book Manager	Includes all Buyer capabilities, and allows access to manage carts & baskets that the user is a Sales Cloud or Service Cloud user.	S2B Buyer Manager Permission Set One Test
<input type="checkbox"/> Clone	CRM User	Allows access to commerce admin features.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allows access to commerce admin features.	Commerce Admin Permission Set License Test
<input type="checkbox"/> Clone	Service Cloud Voice Agent	Manage Service Cloud Voice contact centers that use Amazon Com.	Service Cloud Voice User
<input type="checkbox"/> Clone	Service Cloud Agent	Access Agent features in Service Cloud voice contact centers that u	Service Cloud Voice User
<input type="checkbox"/> Only Clone	Enterprise Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subscriptions, and	Facility Manager
<input type="checkbox"/> Clone	Field Service Mobile	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/> Clone	FastForward to Service Cloud	Allows access to commerce merchandising features.	Commerce Merchandising User Permission Set License Test
<input type="checkbox"/> Clone	Marketing		
<input type="checkbox"/> Clone	Order Management User	Read Access to all entities enabled by Order Management	Lightning Order Management User

1/25 of 25 (5) 0 Selected (0)

Page 1 of 2

3. Give the name of the Permission set name as teacher permission and then under the

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Permission Set
Create

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

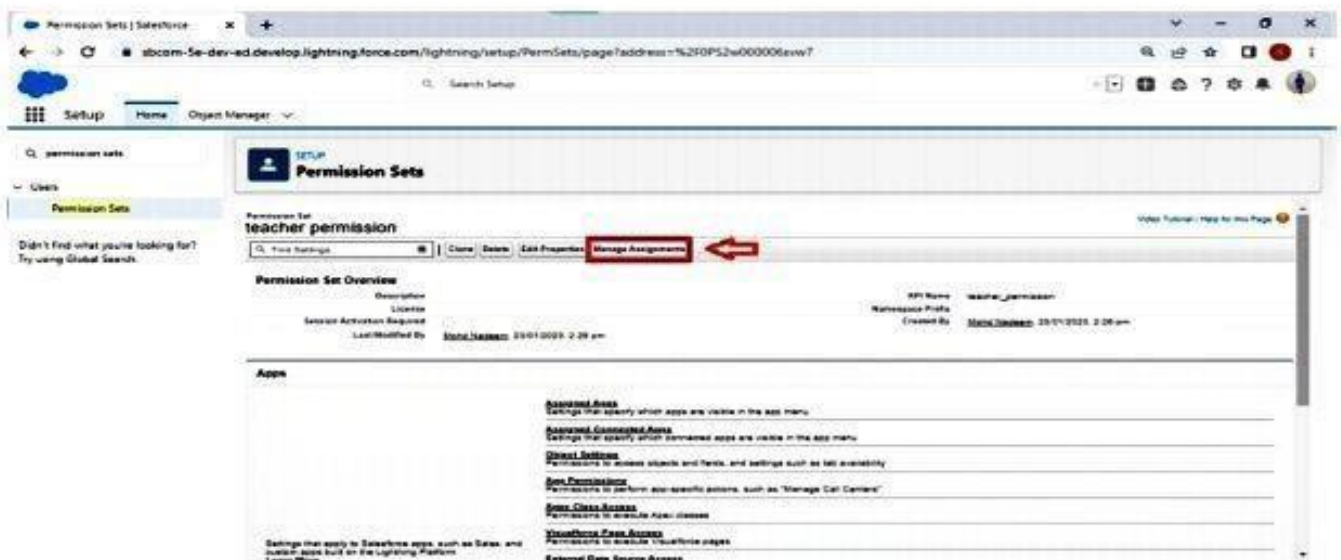
Who will use the permission set?

- Choose "None" if you plan to assign the permission set to include users with different user and permission set licenses.
- Choose a specific user license if you want users with only the license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto assigned with the permission set.

Not sure what a permission set license is? [Learn more here](#)

License

[Save](#) [Cancel](#)



Permission Set
teacher permission

[Clone](#) [Delete](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview

Description

License

Session Activation Required ☐

Last Modified By [John Thomas](#) 29/01/2023 2:28 pm

API Name [teacher_permission](#)

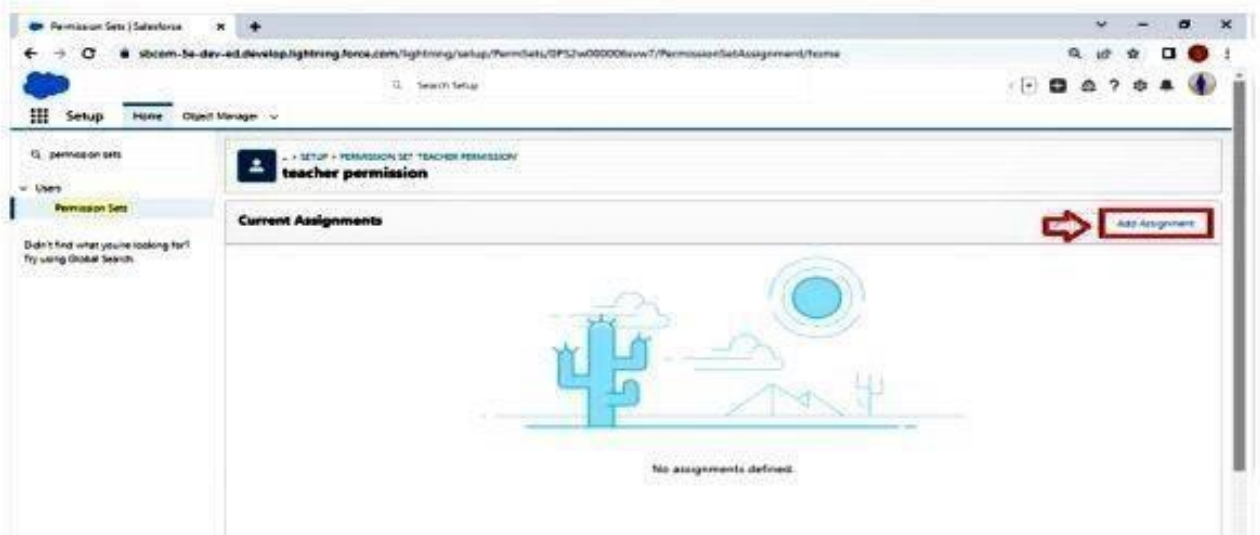
Namespace Prefix

Created By [Mark Thomas](#) 29/01/2023 2:28 pm

Apps

- 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 field availability.
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Center".
- App Class Access**
Permissions to invoke Apex classes.
- Visualforce Page Access**
Permissions to invoke Visualforce pages.
- External Data Source Access**
Permissions to access external data sources.

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



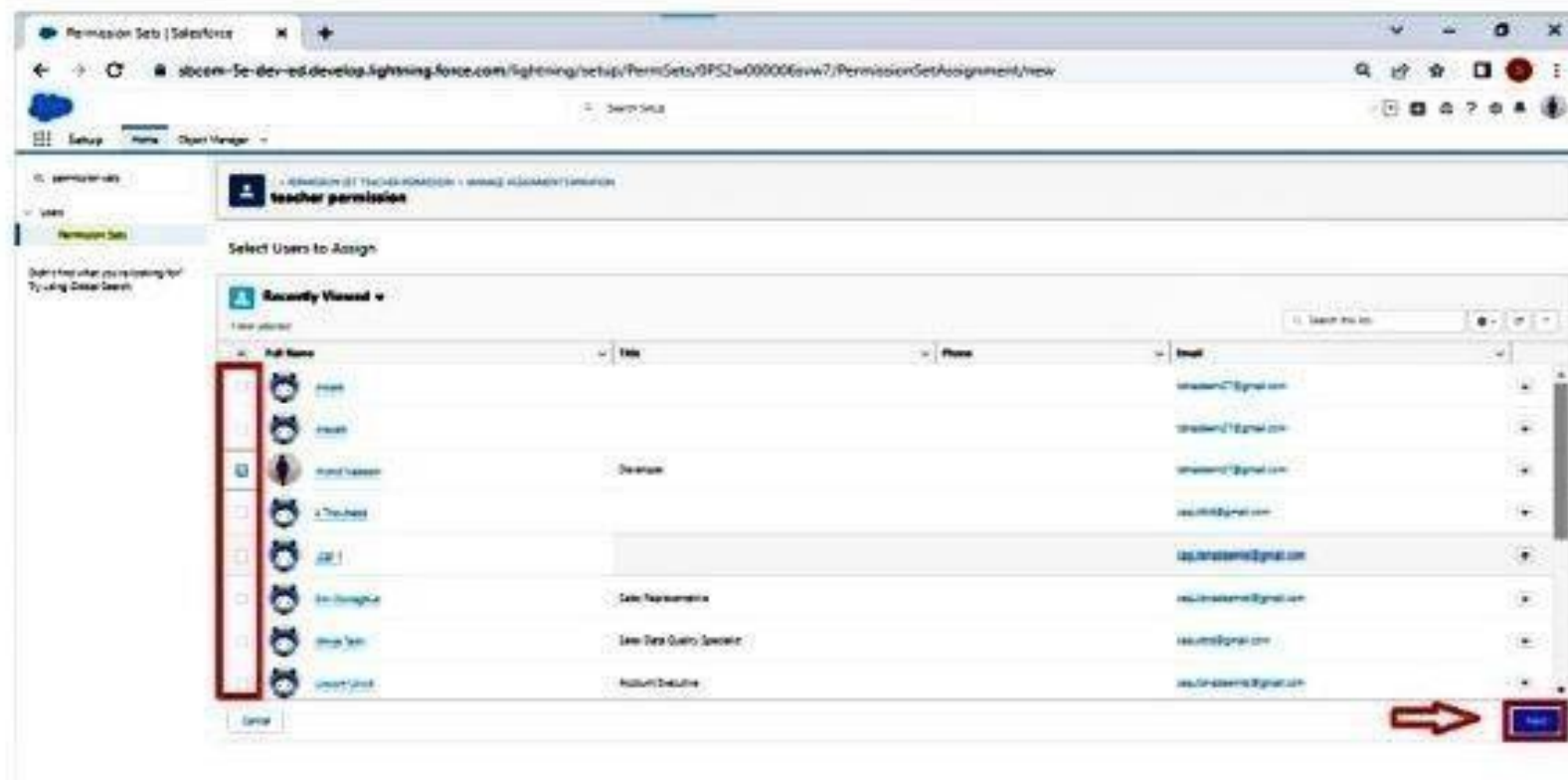
Permission Set
teacher permission

Current Assignments

[Add Assignment](#)

No assignments defined.

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Similarly follow the above steps for the permission set 2.

Activity-2:

Permission sets 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

Milestone-8:Reports

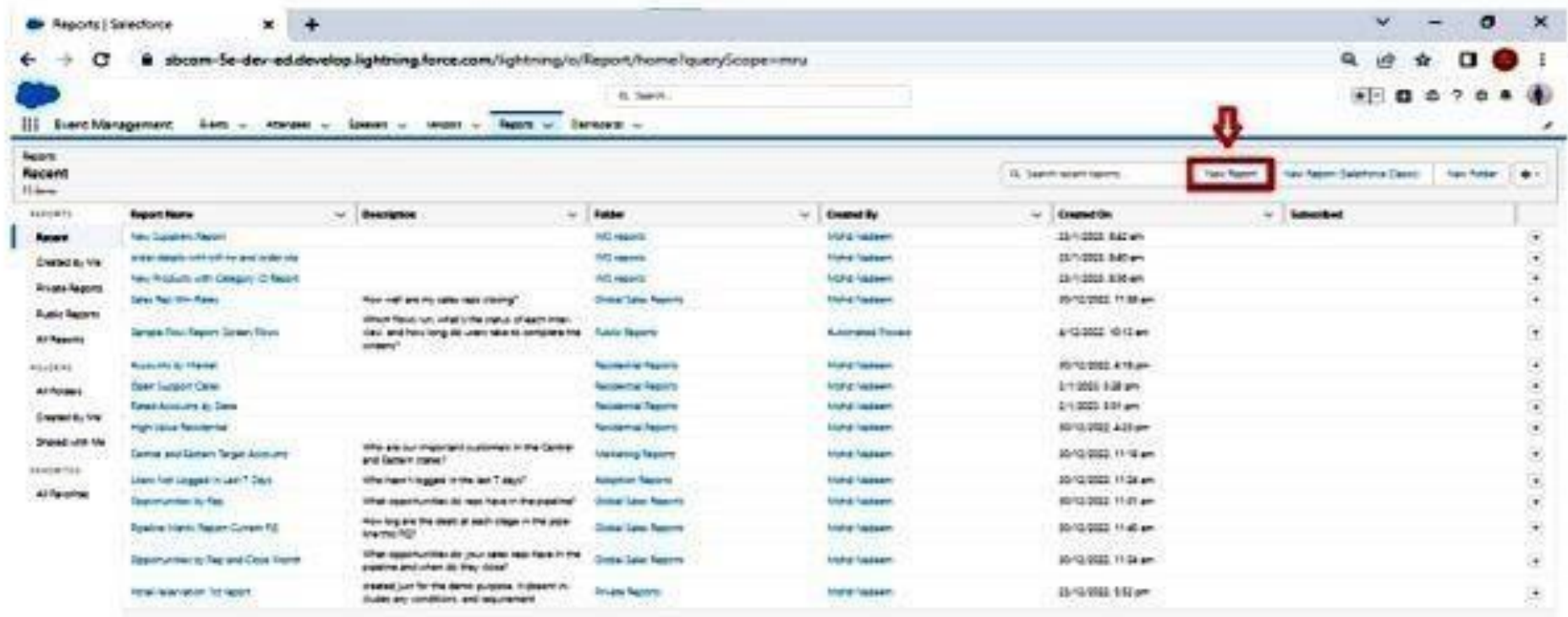
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in

rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

Reports :

1. From the Reports tab, click New Report



The screenshot shows the Salesforce Reports interface. The top navigation bar includes the 'Reports' tab, which is currently selected. Below the navigation bar, there is a search bar and a 'New Report' button, which is highlighted with a red box and a red arrow pointing to it. The main content area displays a list of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports are organized into sections: Recent, Created by Me, Private Reports, Public Reports, All Reports, and Shared with Me. The 'Recent' section shows a list of reports, including 'New Customers Report', 'Enter Deals with Call by and Order by', 'New Products with Category ID Report', 'Sales Rep On-Flow', 'Sample Flow Report: Order Flow', 'Accounts by Market', 'Open Support Cases', 'Email Accounts by Date', 'High Value Accounts', 'Current and Former Target Accounts', 'Users Not Logged in Last 7 Days', 'Opportunities by Rep', 'Opportunities by Stage and Close Date', and 'Email Reservation Test Report'.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Customers Report		My Reports	Myself	11/1/2022 9:42 am	
Enter Deals with Call by and Order by		My Reports	Myself	11/1/2022 9:40 am	
New Products with Category ID Report		My Reports	Myself	11/1/2022 9:39 am	
Sales Rep On-Flow	How well are my sales reps closing?	Shared Sales Reports	Myself	10/12/2022 11:58 am	
Sample Flow Report: Order Flow	Where flows run, what is the status of each interaction, and how long do users take to complete the process?	Public Reports	Automated Process	6/12/2022 10:12 am	
Accounts by Market		Reported by Reports	Myself	10/12/2022 8:19 am	
Open Support Cases		Reported by Reports	Myself	1/1/2022 9:38 am	
Email Accounts by Date		Reported by Reports	Myself	2/1/2022 1:01 am	
High Value Accounts		Reported by Reports	Myself	10/12/2022 4:22 am	
Current and Former Target Accounts	Who are our important customers in the Current and Former state?	Marketing Reports	Myself	10/12/2022 11:14 am	
Users Not Logged in Last 7 Days	Who have I logged in the last 7 days?	Adoption Reports	Myself	10/12/2022 11:24 am	
Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Myself	10/12/2022 11:01 am	
Opportunities by Stage and Close Date	How long are the deals at each stage in the pipeline and when do they close?	Global Sales Reports	Myself	10/12/2022 11:46 am	
Opportunities by Rep and Close Date	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Myself	10/12/2022 11:24 am	
Email Reservation Test Report	created just for the demo purpose. It doesn't include any conditions, and requirement	Private Reports	Myself	11/12/2022 9:52 am	

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Category

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports
- Hidden Report Types

Select a Report Type

Search Report Types

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with SolarBots	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard
Opportunities with Contact Roles	Standard
Opportunities with Partners	Standard
Opportunities with Competitors	Standard
Opportunity History	Standard
Opportunity Field History	Standard
Opportunity Trends	Standard

Details

Accounts
Standard Report Type

Start Report

Details Fields (71)

Created By You

- Accounts by Market
Last Used 1/3/2023
- Rated Accounts by State
Last Used 1/3/2023
- High Value Residential
Last Used 1/2/2023

Created By Others
No Reports Yet

Objects Used in Report Type

- Role
- Account
- Operating Hours
- Asset

2. Select the report type as School with students and parents for the report, and click Create.



Report Builder | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/one/one.applay/b21wb251bnREZWM0dyZlYXN0b3R0eG9ydE1aR0aZG9ldH9yZW1dGzdp7bnR29yZBkjo...

Event Management | Sales | Analytics | Leads | Orders | Reports | Dashboard

REPORT | New Accounts Report | Accounts

Run Feedback | Run | Run | Run | Run

Processing a limited number of records. Run the report to see everything.

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Model Account	James D & Son - Oregon	Customer	State	Medium	10/15/2021
2	Model Account	James D & Son - OH	Customer	State	Medium	10/15/2021
3	Model Account	University of Chicago	Customer	State	High	10/15/2021
4	Model Account	Winthrop, North Carolina	Residential	Ind	Low	10/15/2021
5	Model Account	Winthrop, North Carolina	Residential	Ind	Low	10/15/2021
6	Model Account	Henry James	Customer	State	High	10/15/2021
7	Model Account	John Smith	Residential	Partner	Low	10/15/2021
8	Model Account	Top North Carolina	Residential	Ind	Low	10/15/2021

Groups: Add group

Columns: Add column, Last Activity, Account Name, Billing State/Province, Type, Rating, Last Modified Date

3. Customize your report, then save or run it.

PROJECT REPORT

4. Trailhead Profile Public URL :

Team Leader : <https://trailblazer.me/id/abinv7>

Team member 1 : <https://trailblazer.me/id/abimm3>

Team member 2 : <http://trailblazer.me/id/adevit22>

Team member 3 : <https://trailblazer.me/id/benas14>

PROJECT REPORT

5 ADVANTAGES AND DISADVANTAGES

Advantage

- **Improve student Admission lifecycle.**
- **History of work with each student.**
- **Relevant and visual MIS Analytics Reports.**
- **Connect insights across recruitment and admission, students experience, advancement and marketing for a 360 – degree view of every constituent.**
- **A unified view of constituent information.**
- **The flexibility needed to pivot quickly.**
- **Personalized communications.**
- **Educational organization to more effectively manage leads, including lead scoring and personalized follow-up.**
- **Allows for easier collaboration.**

Disadvantage

- **A costly project.**

PROJECT REPORT

- **May also loss of collection of data or records.**
- **Poor communication.**
- **Lack of leadership.**
- **A waste of time if used incorrectly.**
- **Burdensome data entry.**
- **Staff resistance.**
- **Third party access.**

6.APPLICATION

- **Tracking customers.**
 - **Improving interactions and communications.**
 - **Inbuild reports dashboards to analyses the results.**
 - **Improved student engagement by tracking the student academic performance, attendance, and behavior and This enables the institution to identify struggling students take the correct measure.**
-

PROJECT REPORT

- **CRM Application is an innovative initiative that schools and colleges can embrace to improve their processes, enhancing their relationships with parents, students and the community at large.**

7.CONCLUSION

- **The implementation of a CRM application in school or college management has proven to be an effective solution to enhance the student experience and streamline administrative tasks.**
- **A CRM application are able to maintain the communications with students and parents and track the student academic year progress and respond the inquiry in a quick manner.**
- **The application provides the centralized platform for managing student data, implementing targeted marketing strategies and enabling intelligent decision making.**

PROJECT REPORT

8.FUTURE SCOPE

- **All in all, an effective CRM for educational institution help the organization improve operations and trim expenses and grow revenues.**
- **Focuses soft net offers customizable and diverse, scalable and anon stop CRM for educational institutions. It is the best CRM for higher education, schools and other institutes that is fully equipped to support mobility and modern-day necessities.**