Smart Internz

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,

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.

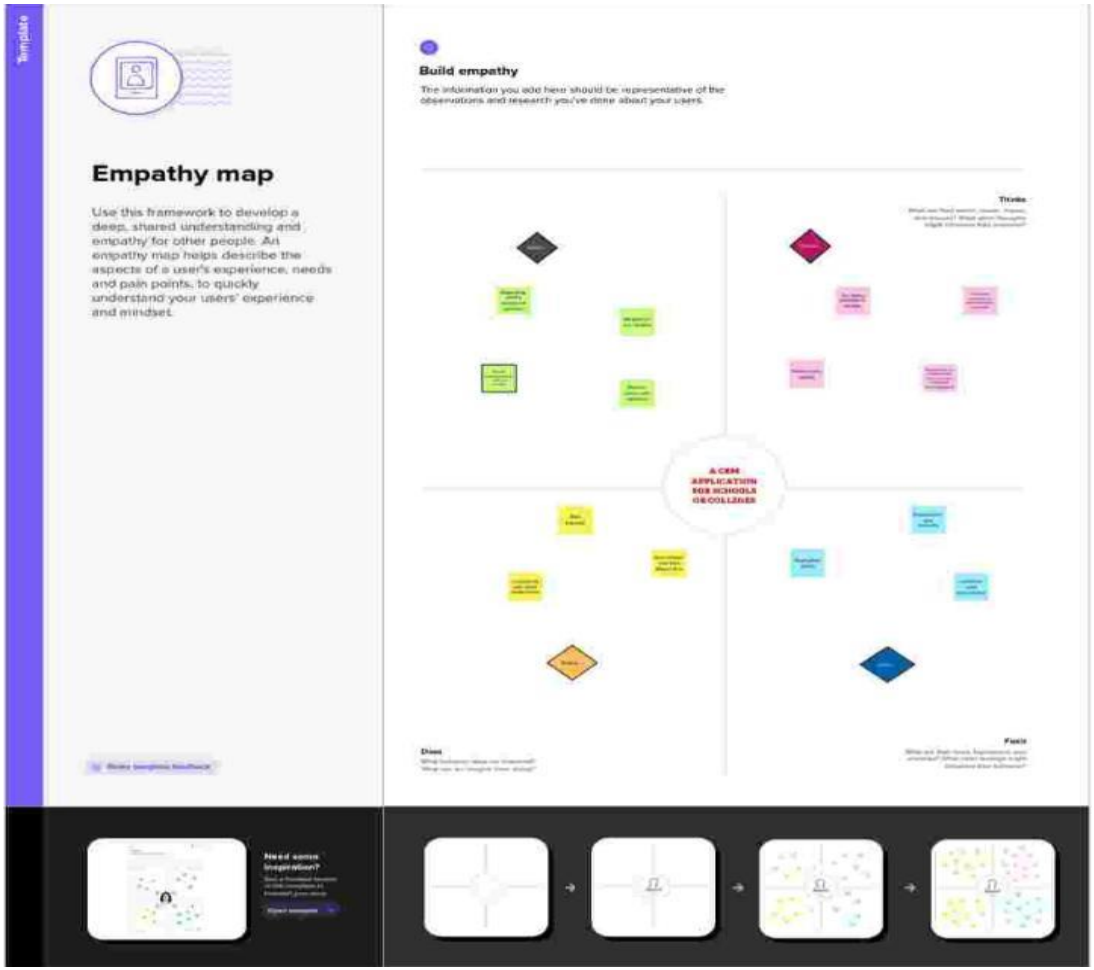
- It can help by personalizing communications and providing automated follow-up, educational organization can build better relationships with students and leads and keep them engaged over time.

- A CRM system can improve the communications between different departments within an organization and help to increases 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

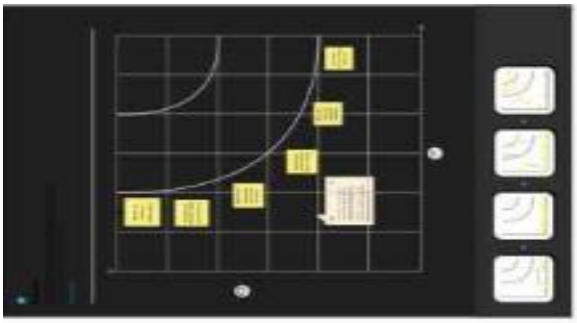
2.1 Empathy Map

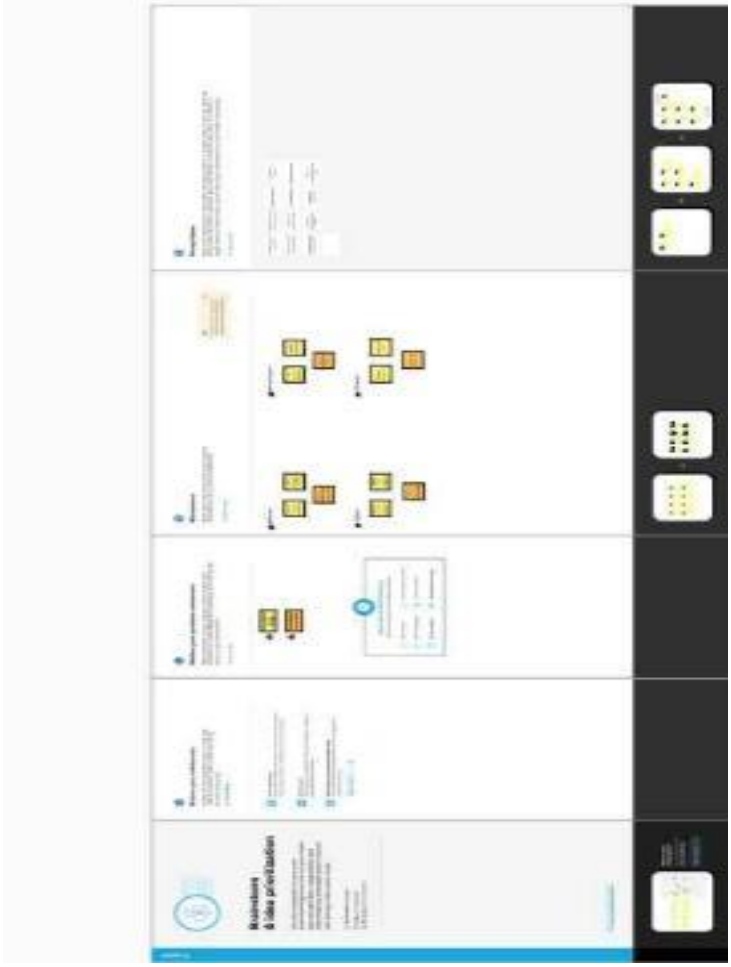


Smart Internz

PROJECT REPORT

2.2 IDEATION AND BRAINSTORMING MAP





PROJECT REPORT

3 RESULTS

3.1 DATA MODEL

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

Smart Internz

PROJECT REPORT

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

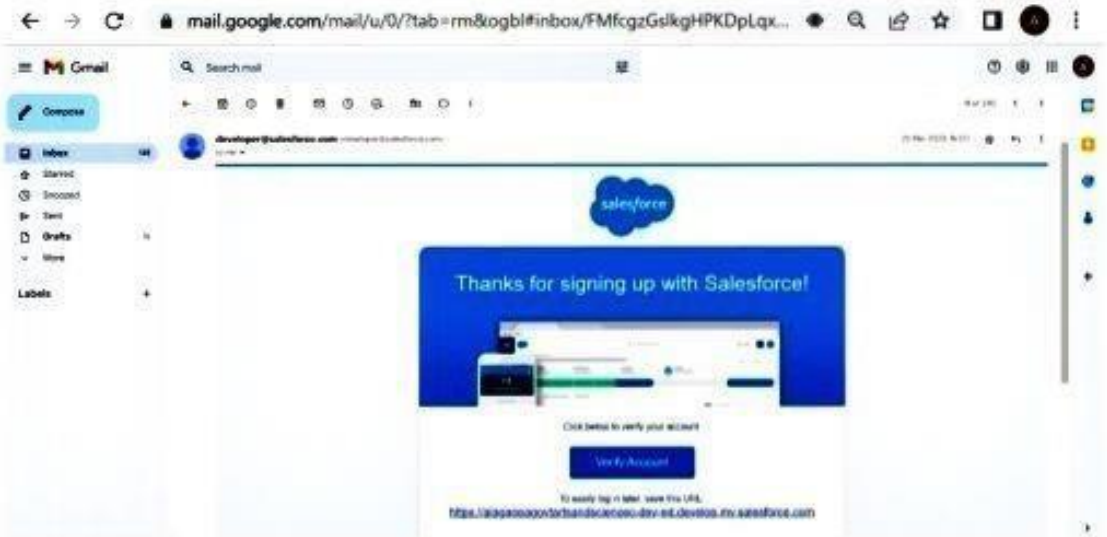
Click on sign up after filling these

Smart Internz

PROJECT REPORT

Account Activation

Go to the Gmail inbox and click developers.salesforce.com/ **that you used while sign up. Click on the verify account to activate your account.**



Login To Your Salesforce Account

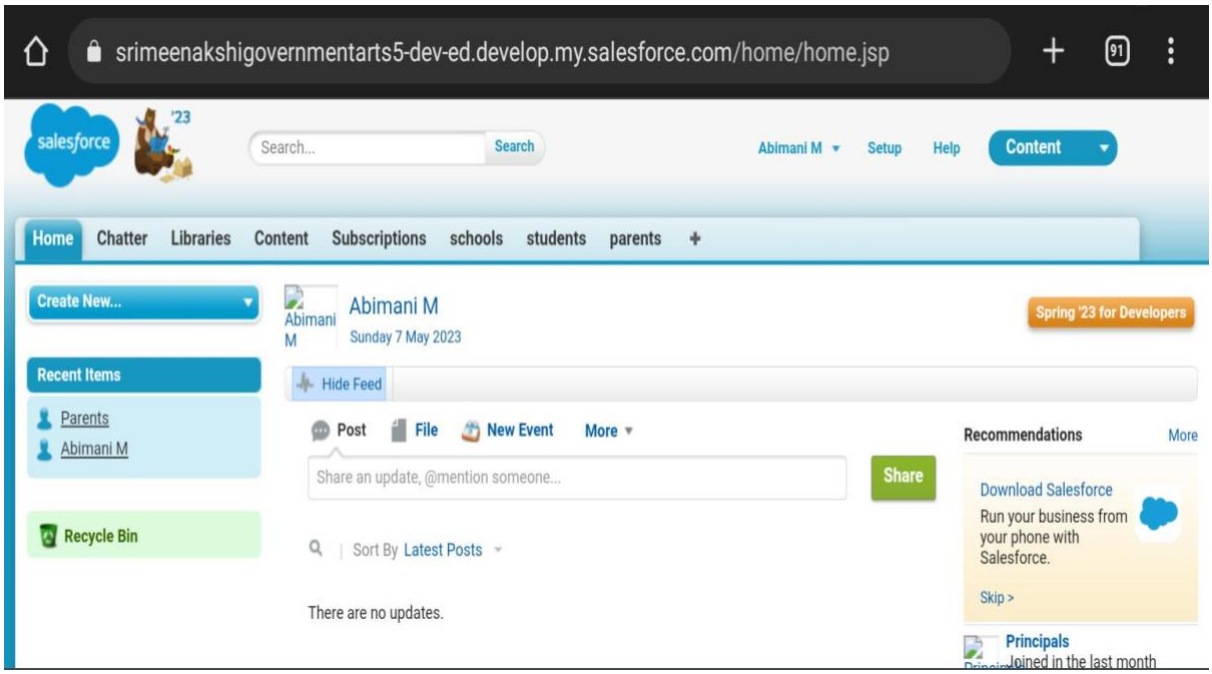
1.Go to developers.salesforce.com/ and **click on login.**

2.Enter your username and password that you had already created.

3.After login this homepage will appear.

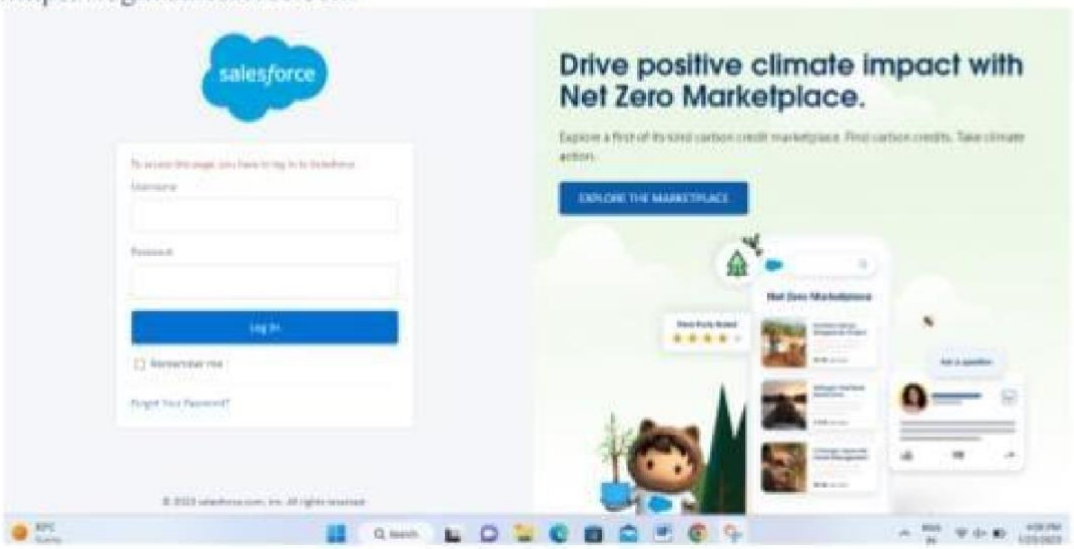
Smart Internz

PROJECT REPORT



Salesforce Login

htttps://login.salesforce.com



Smart Internz

PROJECT REPORT

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

Smart Internz

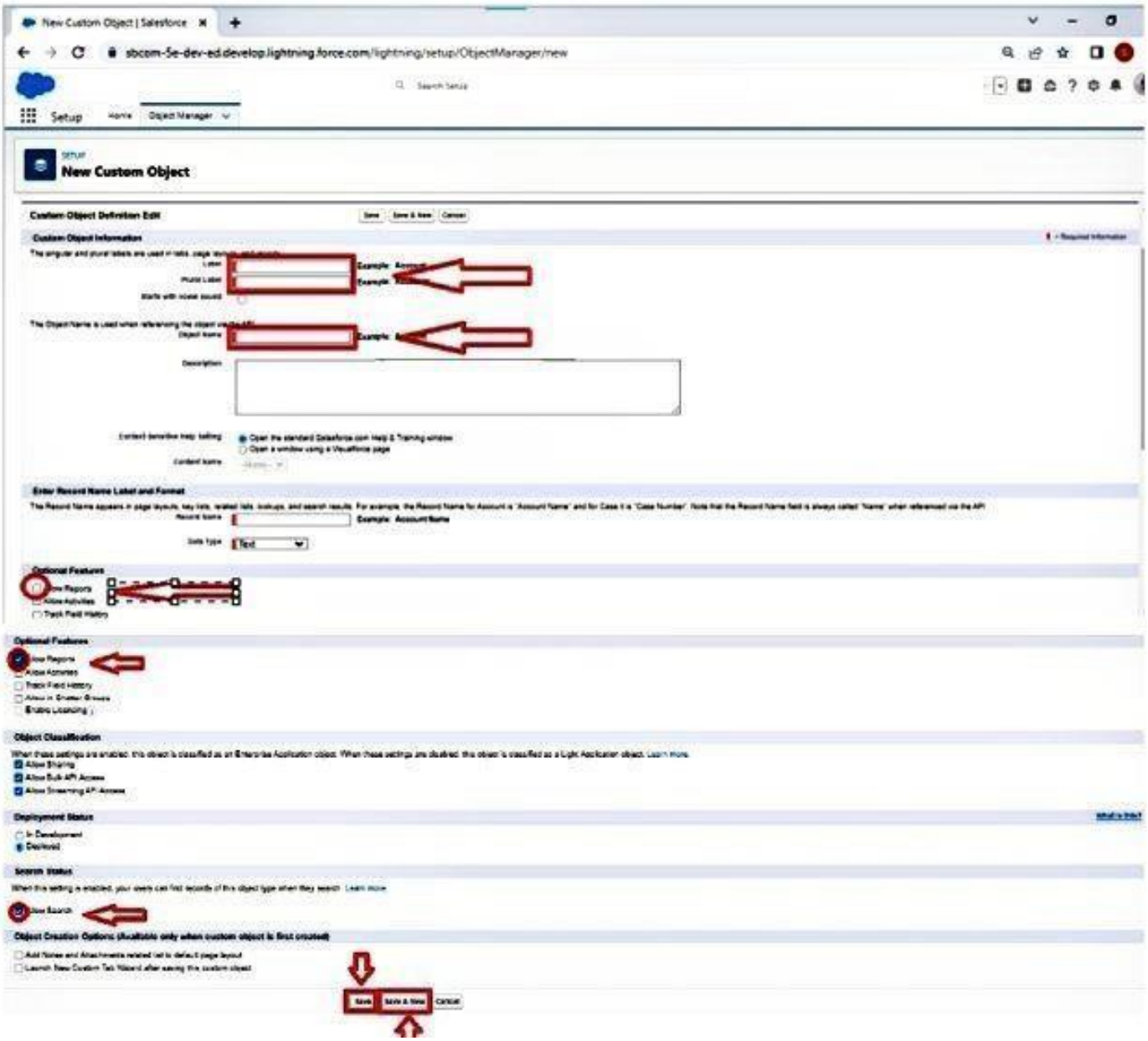
PROJECT REPORT

Check the Allow Reports checkbox

Check the Allow Search checkbox

Click Save.

After clicking you have this

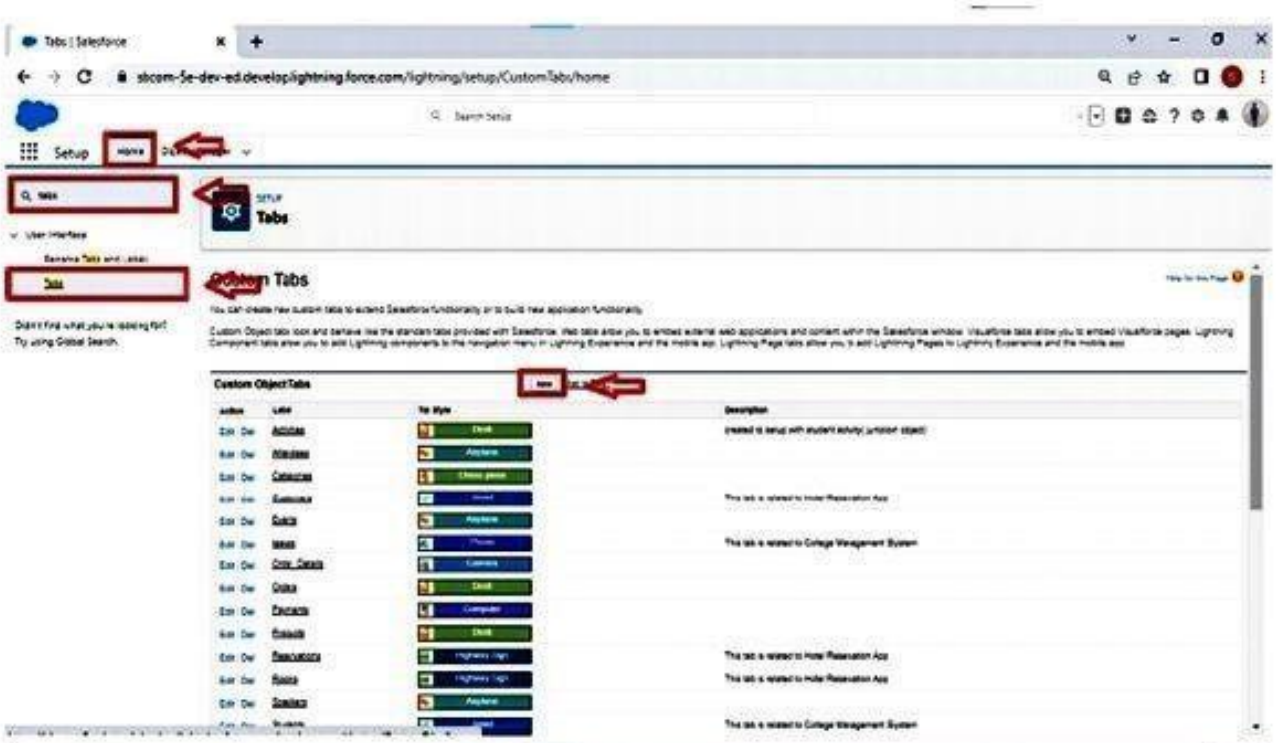


Smart Internz

PROJECT REPORT

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.**



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

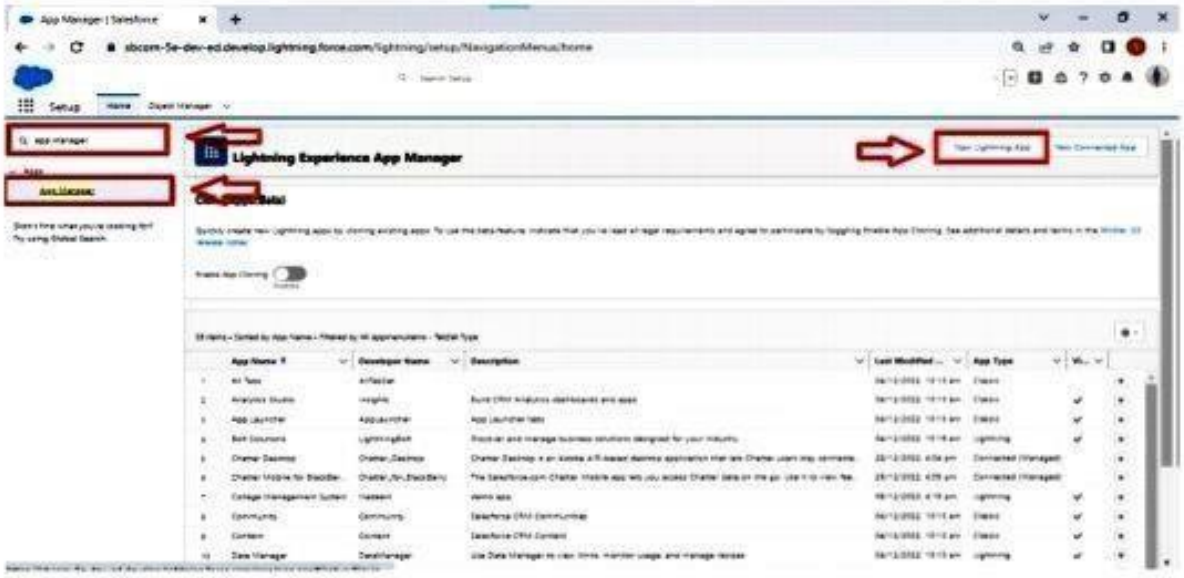
Smart Internz

PROJECT REPORT

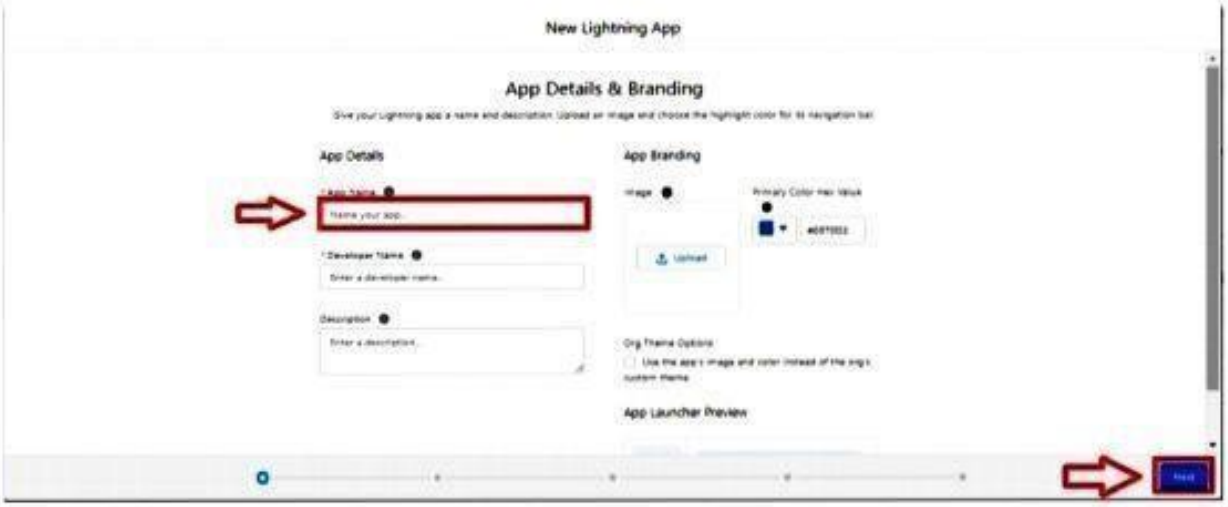
Activity:

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**

PROJECT REPORT

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**

Smart Internz

PROJECT REPORT

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 onan 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

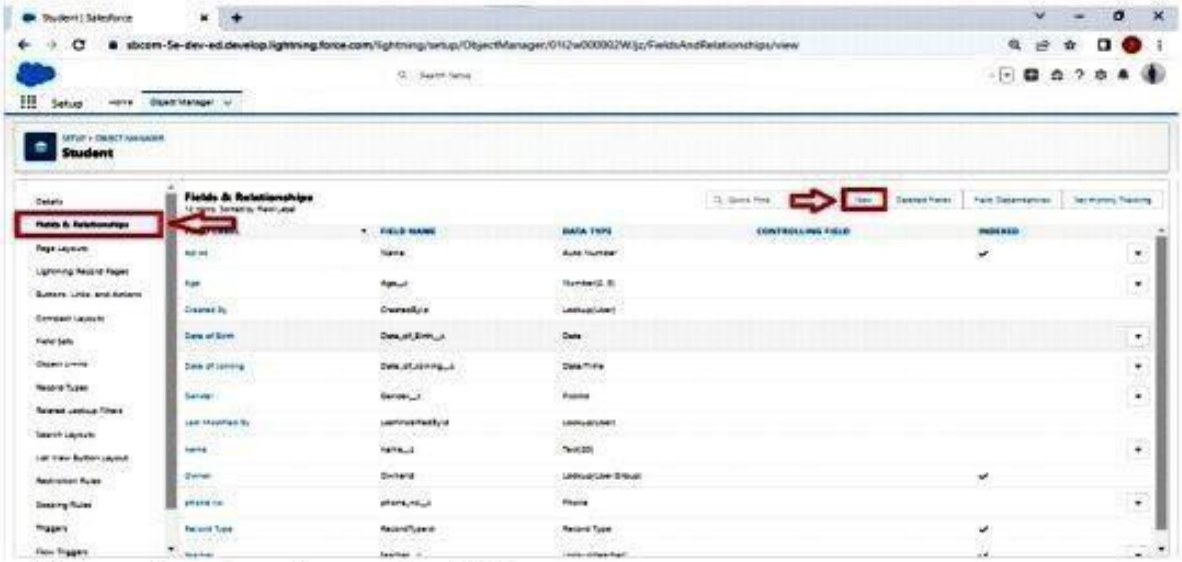
1. **Click the gear icon and select setup.**
2. **Click the object manager next to home tab.**

3.Select School.

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

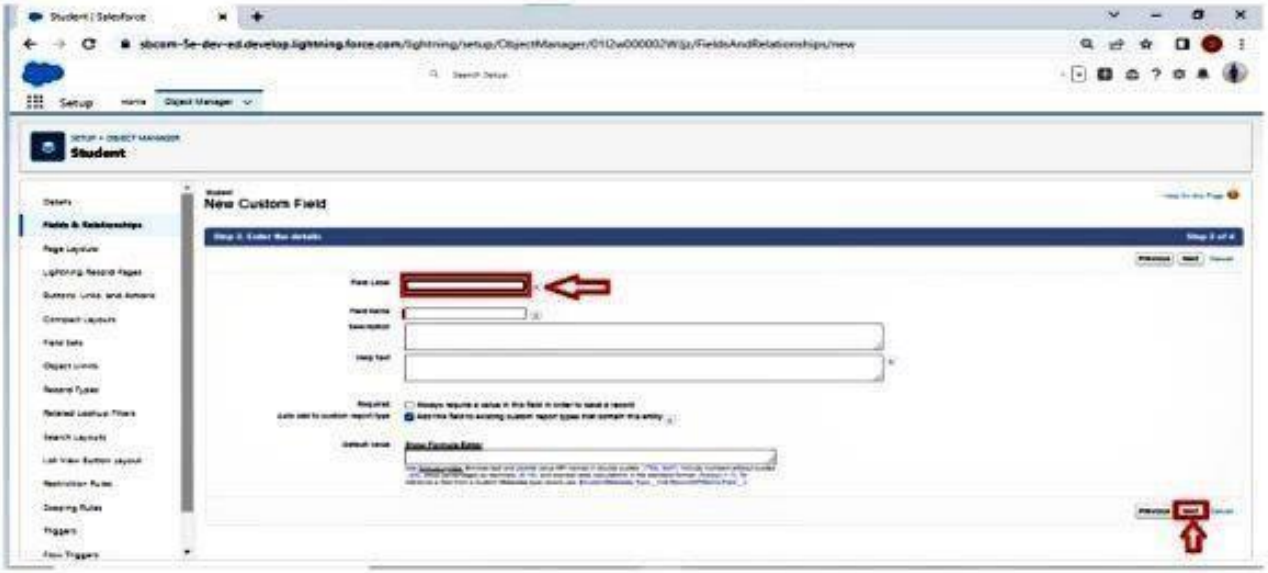
Smart Internz

PROJECT REPORT



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.

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.

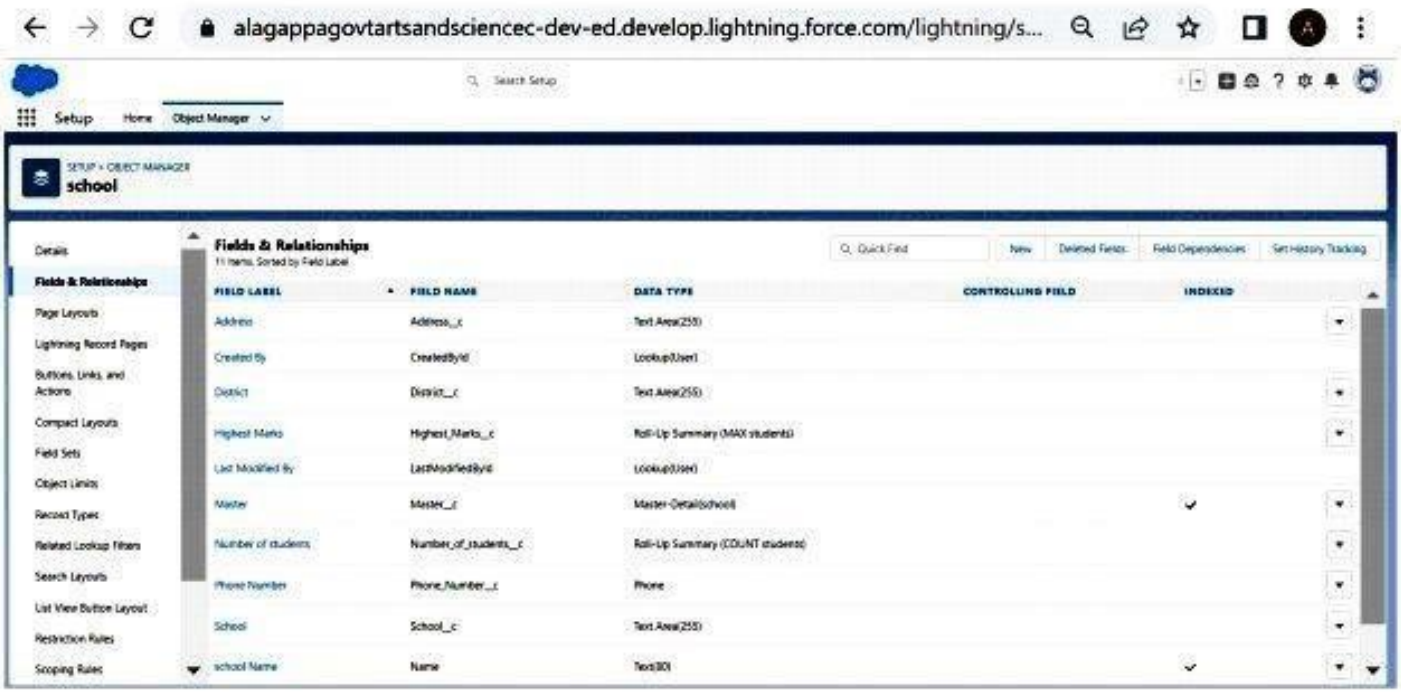
PROJECT REPORT

6. Click Next, Next, then Save & New

After done the above procedure you got the below results

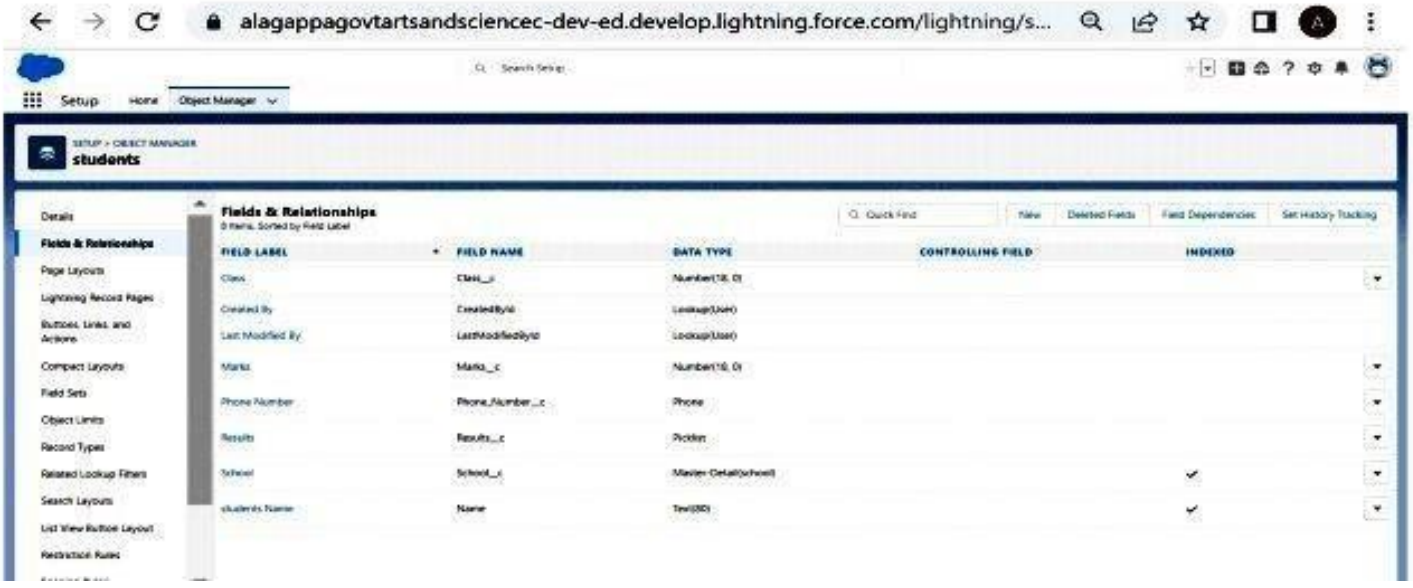
Activity-1

Creation of fields for the school object



Activity-2

Creation of fields for the student object



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:

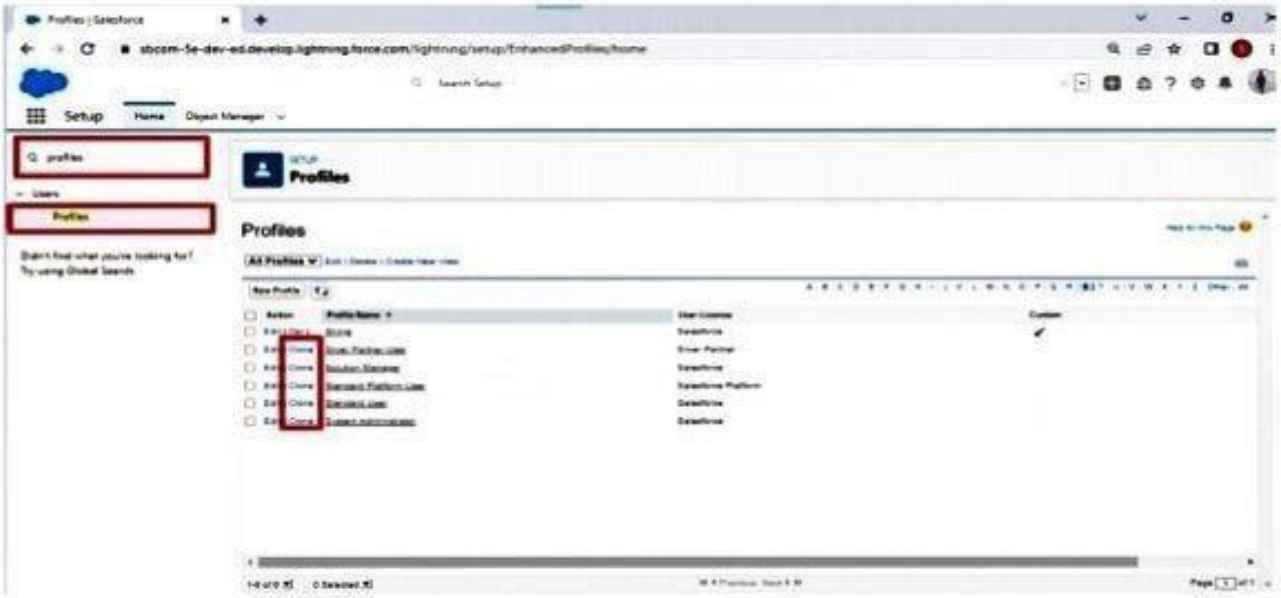
Creation on profile:

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

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

Smart Internz

PROJECT REPORT

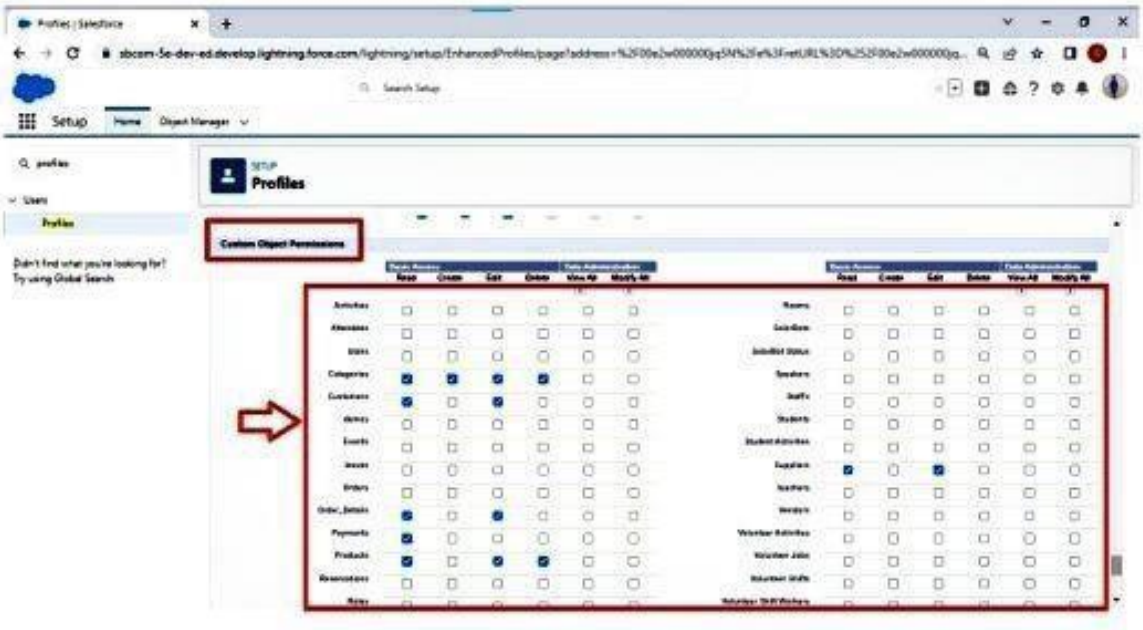


3. For Profile Name, enter School profile

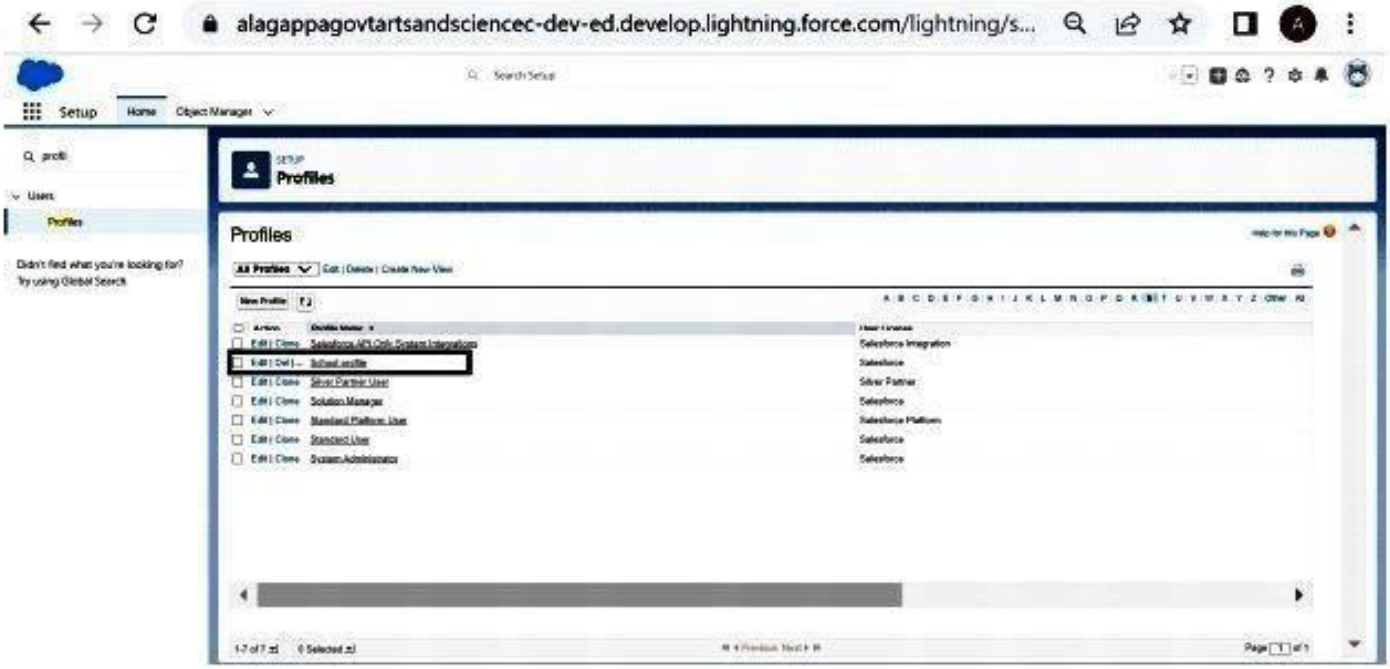
4. Click **Save**.
5. While still on the School profile page, then click **Edit**.
6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

Smart Internz

PROJECT REPORT



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.

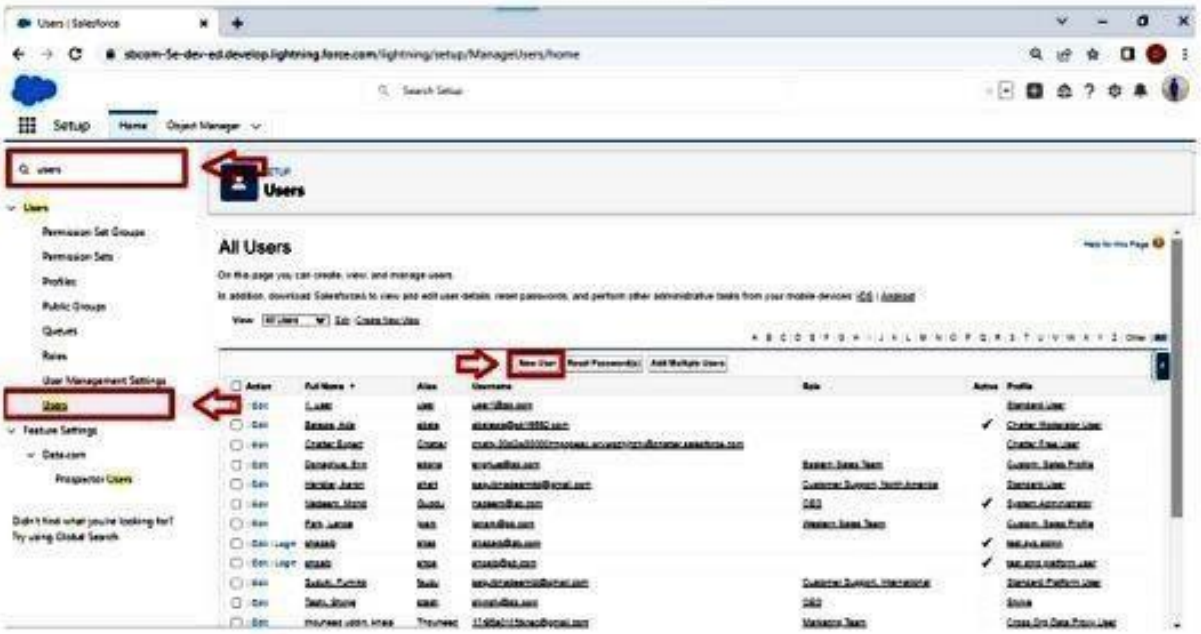
Activity:

Creating Users :

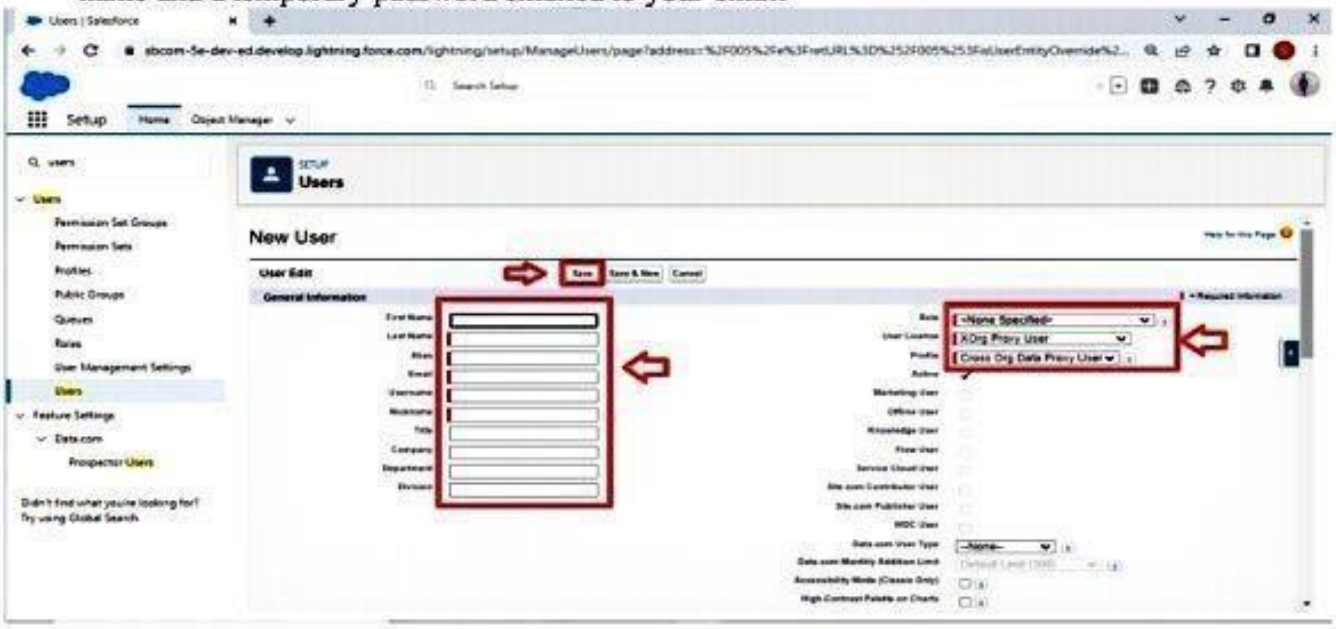
Smart Internz

PROJECT REPORT

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:

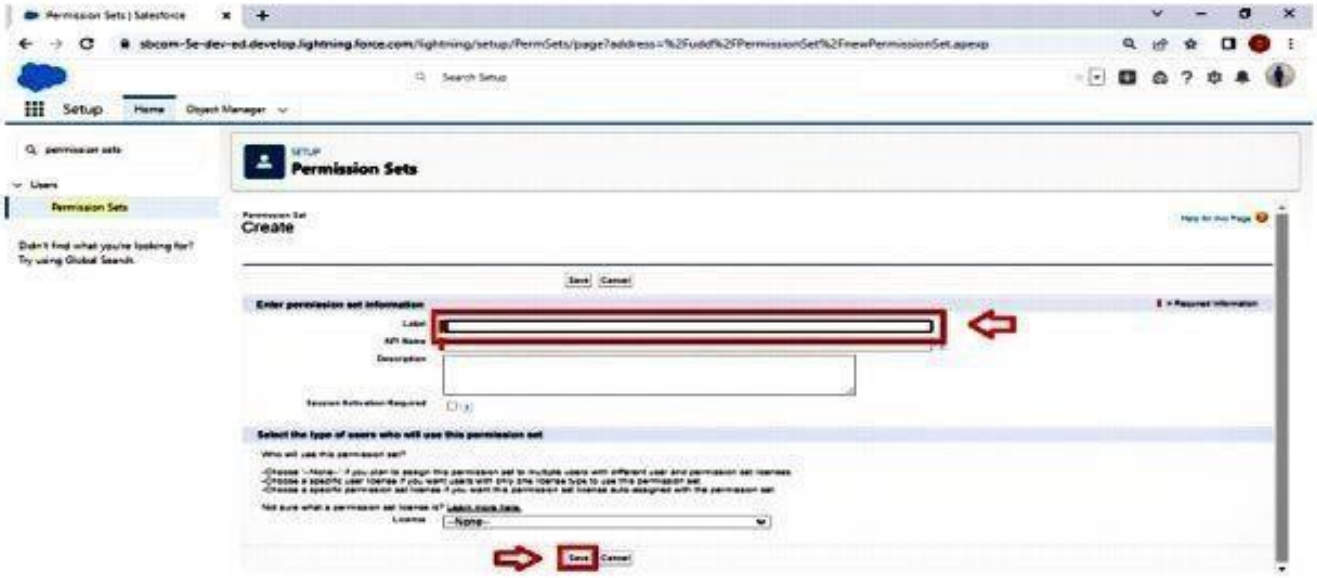
Permission sets 1:

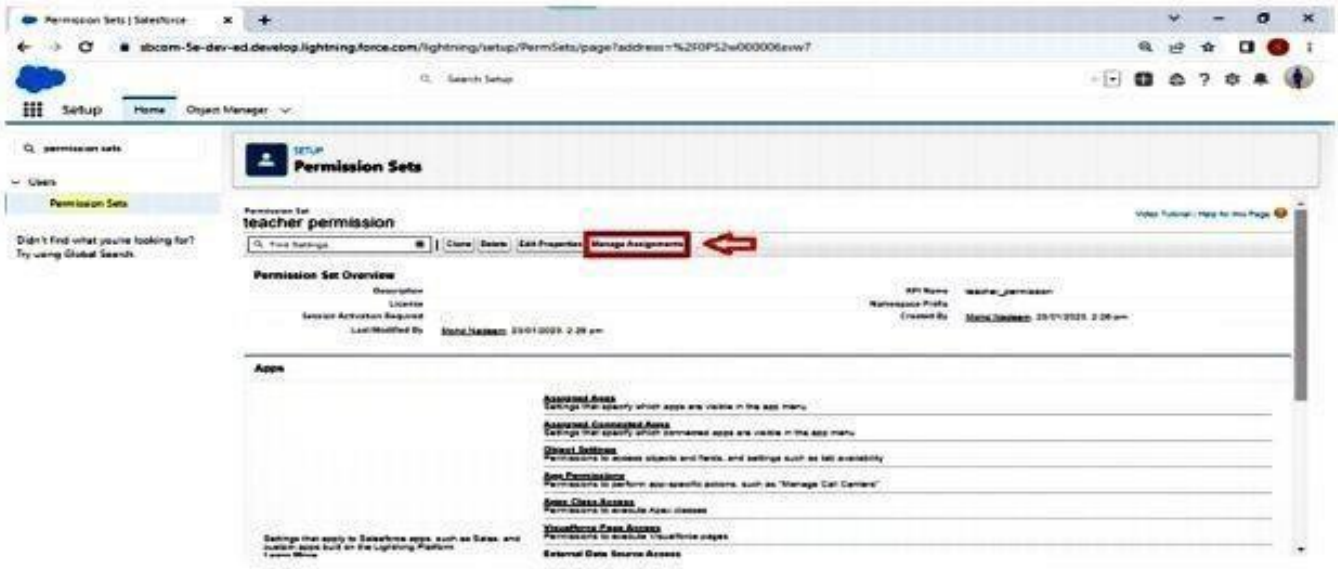
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.

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

Smart Internz

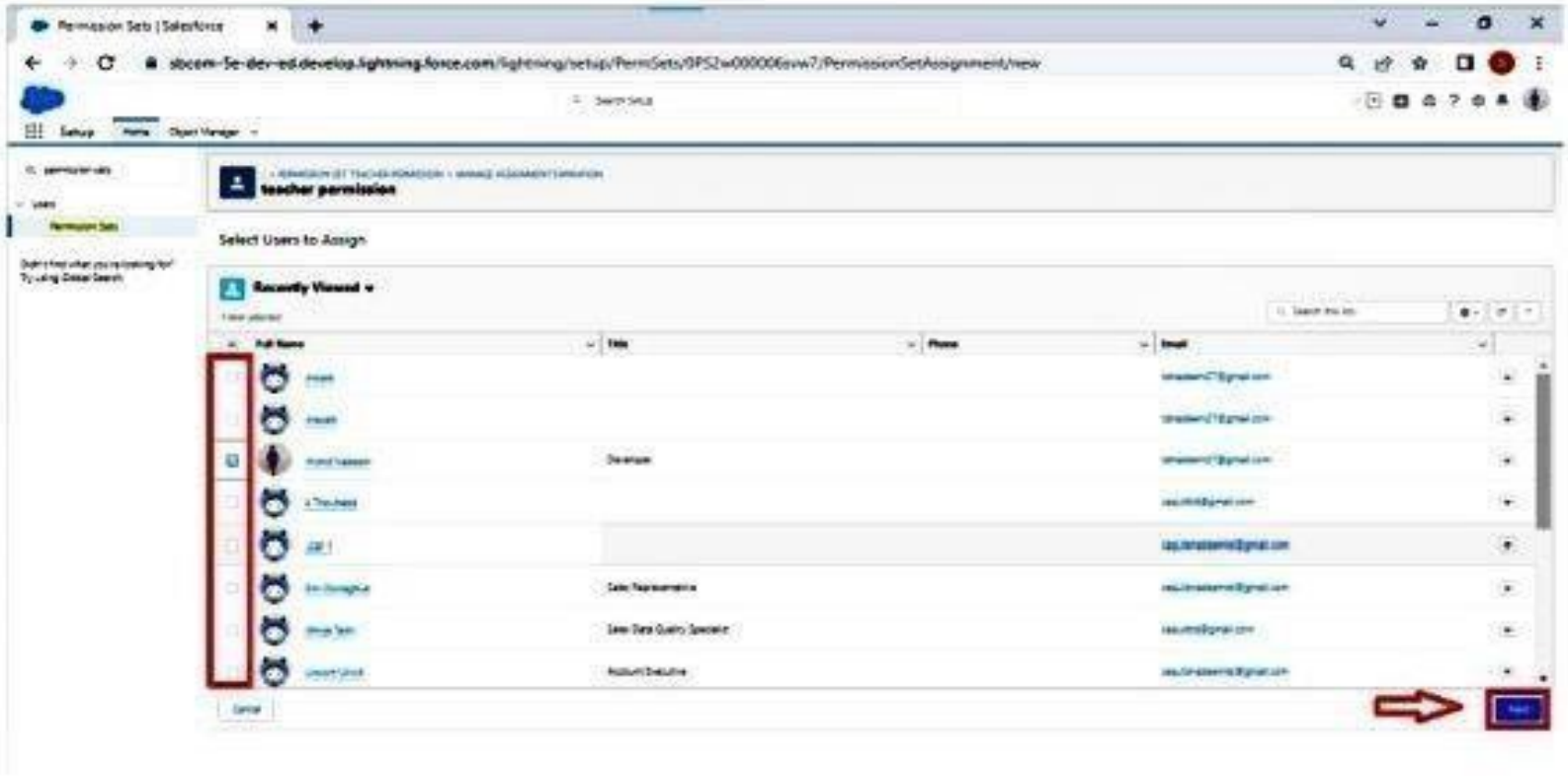
PROJECT REPORT





Smart Internz

PROJECT REPORT



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.

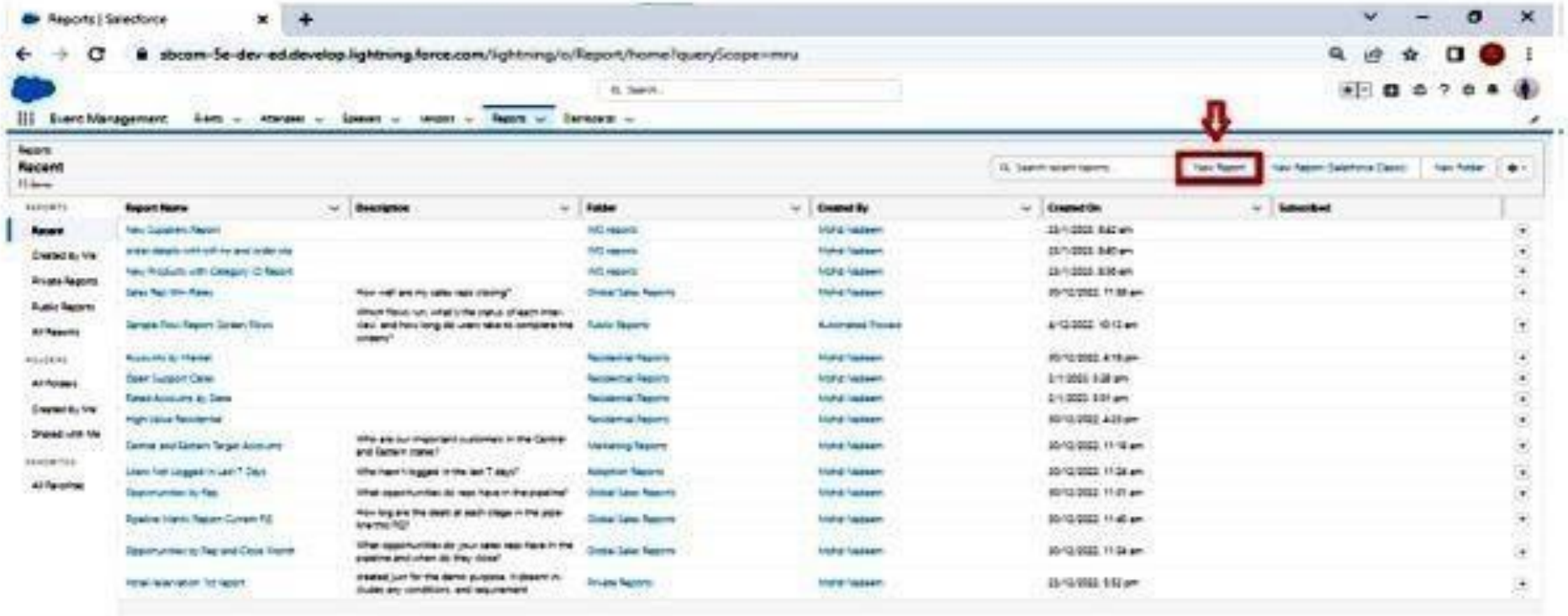
Milestone-8:Reports

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 :

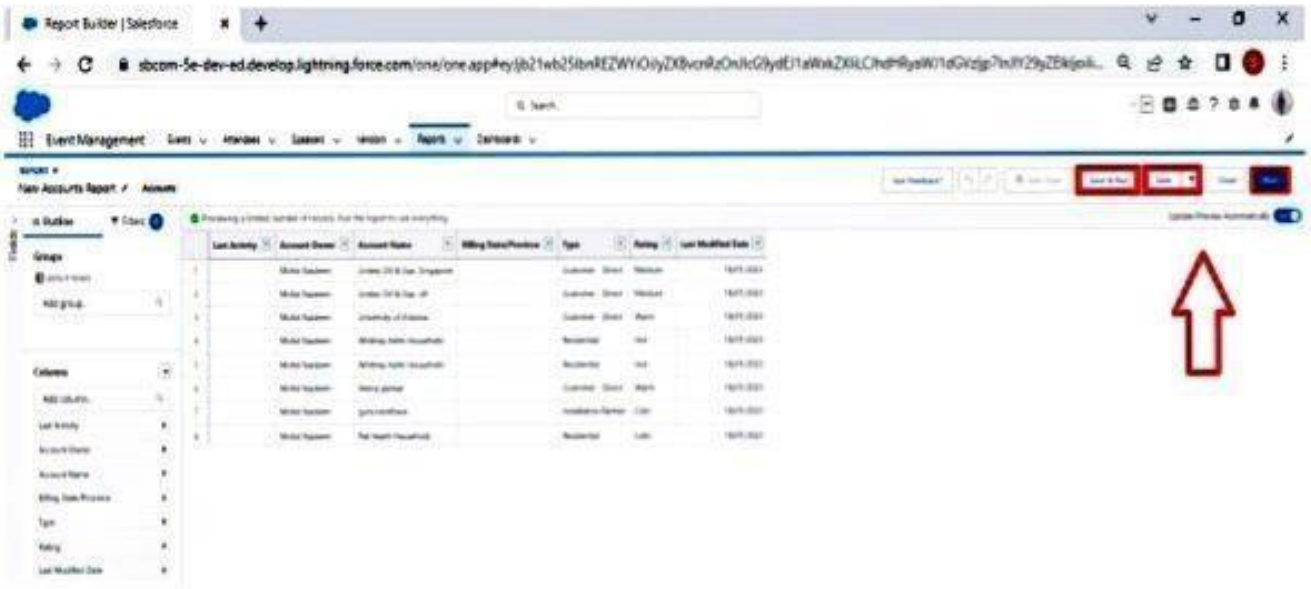
1. From the Reports tab, click New Report



Smart Internz

PROJECT REPORT

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



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

Smart Internz

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

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 consistuent.
- A unified view of consistuent 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.

- 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.