

## Project Report Template

# A CRM Applications for School & College

## 1. INTRODUCTION

### 1.1.What Is a CRM for Education?

An education customer relationship management software (CRM) manages all your institution's interactions with prospective and current students. It also supports managing communications with alumni, employees, donors, and other members of the education sector in your institution.

Education CRM software collects essential customer information from different channels and stores it in a single easy-to-access database. Some of the information a CRM system might collect includes:

- Name
- Age
- Gender
- Educational background
- Contact information (e.g., email, phone number, and social media)

Using this data, you can personalize messages for your students across all channels.

### 1.2.Purpose

#### 1. Manage Students Through Their Enrolment Journey

A CRM platform does that by helping you create a [straightforward journey](#) that assigns leads to specific enrolment officers within your organization. Using your staff at hand, you can create a reliable data capture and contact management system that keeps track of all your new enrolments and stores that information systematically. Contact management tools are especially useful for large institutions with multiple campuses across cities and states.

#### 2. Handle Student and Internal Communications and Inquiries

The right CRM software gives you sufficient tools for communication while also offering other opportunities for personalized and targeted messaging.

Personalized sequences ensure that all your prospective students hear from you at the ideal time. Once a prospect responds in your desired manner, you can set up scheduled meetings or calls.

### 3. Measure the Progress of Your Institution.

It helps you track your institution's progress, giving you valuable insights into different success metrics. Education CRMs can produce reports based on data analysis from all your students.

#### **4. Monitor Fee Payments and Reminders.**

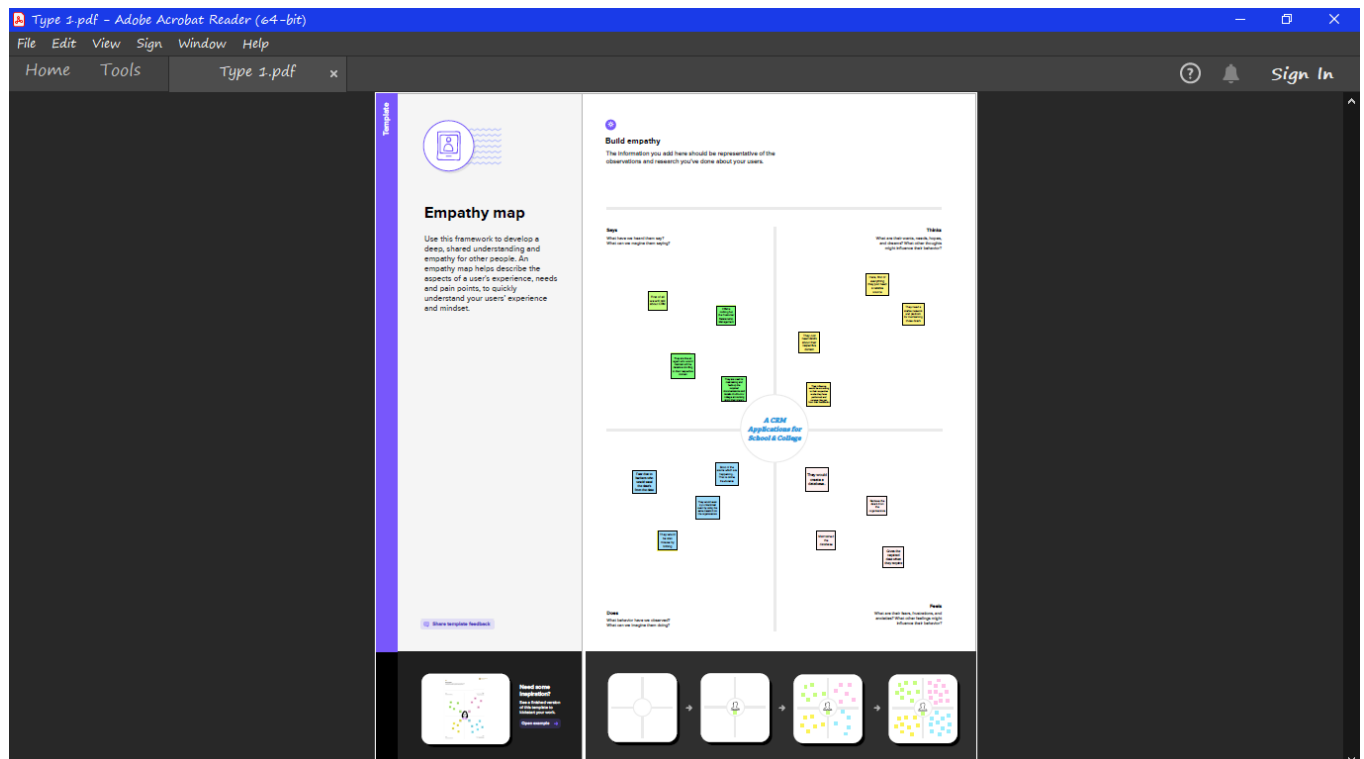
Education CRM's are used as solutions to track payments students make for their modules and courses. Besides showing how much you've collected from student payments; you can also tell how far or close you are from your financial targets. The right CRM software also helps you produce fee statements and manage reminders to students who haven't paid yet.

## 5. Measure Marketing ROI (Return on investment) for Your institution

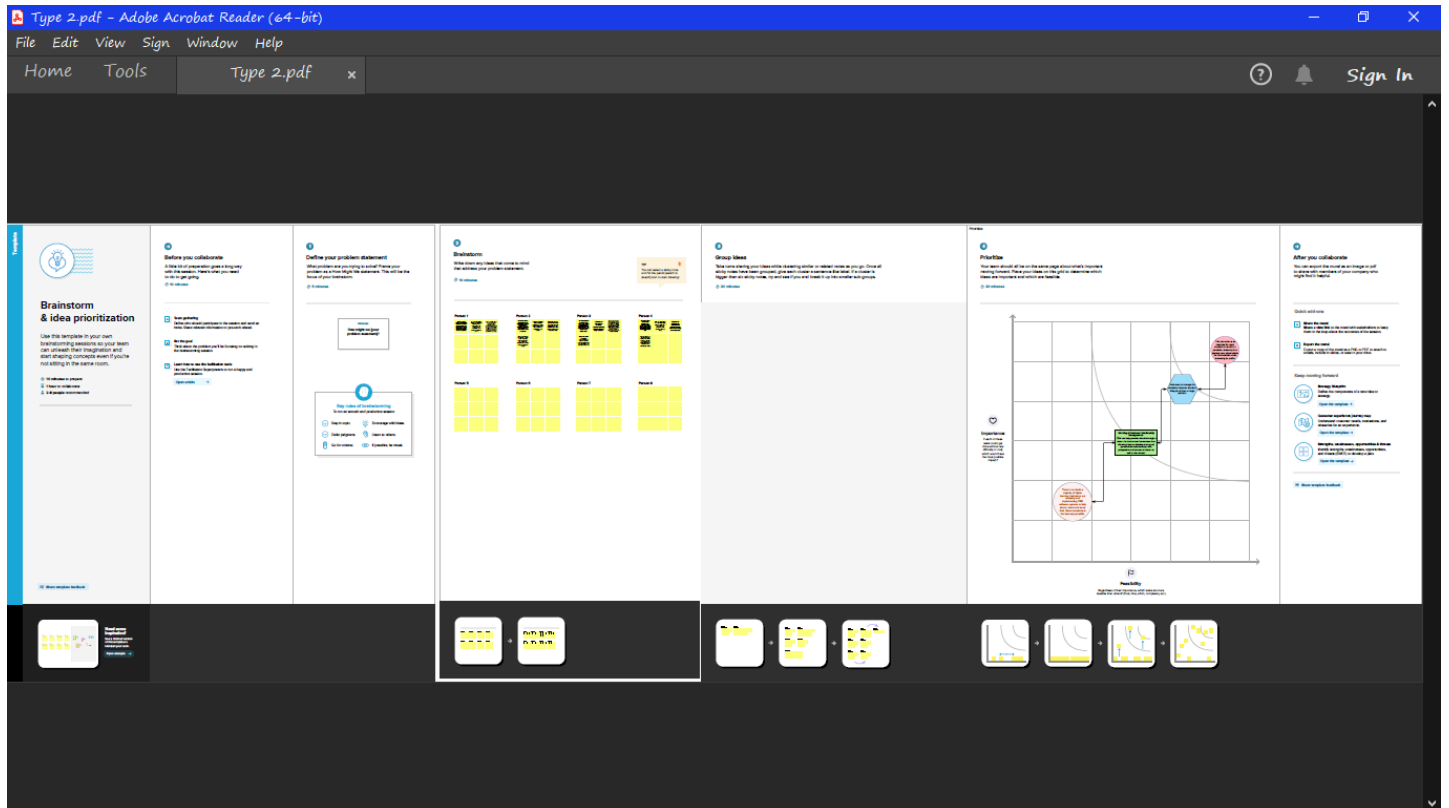
Education CRMs can be an essential tool in your marketing process. Using analytics tools, you'll have a bird's eye view of the success of your marketing efforts and the ability to attribute your admission success to specific platforms.

## 2. Problem Definition & Design

## 2.1. Empathy Map



## 2.2. Ideation & Brainstorming Map



## 3. RESULT

### 3.1. Data Model

Object name	Fields in the Object	
School	<b>Field label</b>	<b>Data type</b>
	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

Students		
	<b>Field label</b>	<b>Data type</b>
	Phone Number	Phone
	School	Master-Detail Relations
	Result 1.Pass 2.Fail	Picklist
	Class	Number
Parent	Marks	Number
	<b>Field label</b>	<b>Data type</b>
	Parent Address	Text Area
	Parent Number	Phone

### 3.2.Activity & Screenshot

#### Creations of School Object

The screenshot shows the Salesforce Setup interface for the 'School' object in the Object Manager. The browser tabs include 'School | Salesforce', '(3) WhatsApp', and 'thiruvalluvargovernmentar26-de'. The URL is 'thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003XDmS/Details/view'. The page title is 'School' under 'SETUP > OBJECT MANAGER'. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main 'Details' section includes fields for Description, API Name (School\_\_c), Custom (checked), Singular Label (School), and Plural Label (Schools). On the right, there are checkboxes for Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings. 'Edit' and 'Delete' buttons are located at the top right of the details section.

## Creations of Student Object

The screenshot shows the Salesforce Setup interface for the 'Students' object. The browser tabs include 'WhatsApp', 'Recently Viewed | Schools | Sales', and 'Students | Salesforce'. The address bar shows the URL: `thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XDmc/Details/view`. The page header includes a search bar and navigation icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area displays the 'Students' object details.

Students	
Description	
API Name	Students__c
Custom	✓
Singular Label	Students
Plural Label	Students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## Creations of Parent Object

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The browser tabs include 'WhatsApp', 'Recently Viewed | Schools | Sales', and 'Parent | Salesforce'. The address bar shows the URL: `thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XDmh/Details/view`. The page header includes a search bar and navigation icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area displays the 'Parent' object details.

Parent	
Description	
API Name	Parent__c
Custom	✓
Singular Label	Parent
Plural Label	Parents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

5 WhatsApp

Recently Viewed | Schools | Sale...

Tabs | Salesforce

thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

GmailYouTubeMapsWhatsApp

Search Setup

Star

+

?

Settings

Notifications

Profile

SetupHomeObject Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

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

NewWhat Is This?

Action	Label	Tab Style	Description
Edit   Del	Parents	People	
Edit   Del	Schools	Pencil	
Edit   Del	Students	Books	

Web Tabs

NewWhat Is This?

Create the School Management App

5 WhatsApp

Recently Viewed | Schools | Sale...

App Manager | Salesforce

thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

GmailYouTubeMapsWhatsApp

Search Setup

Star

+

?

Settings

Notifications

Profile

SetupHomeObject Manager

app manager

Apps

App Manager

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

SETUP

Lightning Experience App Manager

New Lightning AppNew 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 ☐ Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Na...	Description	Last Modifie...	Ap...	V...
1 All Tabs	AllTabSet		10/03/2023, 1:00 pm	Classic	

https://thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/one/one.app#/setup/NavigationMenus/home

Browser tabs: (5) WhatsApp, Recently Viewed | Schools | Sales..., Object Manager | Salesforce

Address bar: [thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home](https://thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home)

Page Header: Search Setup

Navigation: Setup | Home | Object Manager

Object Manager Header:
 
 Schema Builder
 Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
<a href="#">School</a>	School__c	Custom Object		26/03/2023	✓

Status bar: <https://thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/one/one-app#/setup/ObjectManager/0112w000003XDmS/view>

Screenshot of the Salesforce Setup page for the 'School' object manager. The browser tabs show 'WhatsApp', 'Recently Viewed | Schools | Sales...', and 'School | Salesforce'. The URL is <https://thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XDmS/FieldsAndRelationships/view>. The page header includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Details' and 'Fields & Relationships' (selected). The main content area displays 'Fields & Relationships' for the 'School' object, with 11 items sorted by Field Label. The table lists fields with their labels, names, data types, and indexing status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	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 Students)		
Last Modified By	LastModifiedById	Lookup(User)		

Screenshot of the Salesforce Setup page for the 'Students' object manager. The browser tabs show 'WhatsApp', 'Recently Viewed | Schools | Sales...', and 'Students | Salesforce'. The URL is <https://thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XDmc/FieldsAndRelationships/view>. The page header includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Details' and 'Fields & Relationships' (selected). The main content area displays 'Fields & Relationships' for the 'Students' object, with 8 items sorted by Field Label. The table lists fields with their labels, names, data types, and indexing status.

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)		
Phone Number	Phone_Number__c	Phone		



(5) WhatsAppRecently Viewed | Schools | SalesParent | Salesforce

thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003XDmh/FieldsAndRelationships/view

GmailYouTubeMapsWhatsApp

Search Setup

Star

+

Help

?

Settings

Notifications

Profile

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

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)		✓

Creation on Profile

(5) WhatsAppRecently Viewed | Schools | SalesProfiles | Salesforce

thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

GmailYouTubeMapsWhatsApp

Search Setup

Star

+

Help

?

Settings

Notifications

Profile

Setup

Home

Object Manager

profile

Users

Profiles

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

SETUP

Profiles

Screenshot of the Salesforce Setup page for Profiles. The browser tabs show (5) WhatsApp, Recently Viewed | Schools | Sales, and Profiles | Salesforce. The URL is thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005KLaZ%2Fe%3FretURL%3D%2F... The page title is "Profiles" under the "SETUP" header. The left sidebar shows "Setup" with "Home" and "Object Manager" tabs. The "Users" section is expanded, showing "Profiles". The main content area is titled "Profiles" and says "Set the permissions and page layouts for this profile." Below this is a "Profile Edit" section with buttons "Save", "Save & New", and "Cancel". The "Name" is "Standard User" and the "User License" is "Salesforce". There is a "Custom Profile" checkbox. Below this is a "Custom App Settings" section with a table of settings. The table has columns for "Visible" and "Default" for various apps. The "Sales" app is selected as the default. The "Sales Console" app is also selected as the default. The "Salesforce Chatter" app is selected as the default. The "Salesforce Scheduler Setup" app is selected as the default.

App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>

## Users

Screenshot of the Salesforce Setup page for Users. The browser tabs show (5) WhatsApp, Recently Viewed | Schools | Sales, and Users | Salesforce. The URL is thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home. The page title is "Users" under the "SETUP" header. The left sidebar shows "Setup" with "Home" and "Object Manager" tabs. The "Users" section is expanded, showing "User Management Settings" and "Users". The main content area is titled "Users" and shows a table of users. The table has columns for "Action", "Full Name", "Alias", "Username", "Role", "Active", and "Profile". The "Users" section is expanded, showing "User Management Settings" and "Users". The main content area is titled "Users" and shows a table of users. The table has columns for "Action", "Full Name", "Alias", "Username", "Role", "Active", and "Profile".

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	A. GOKUL	ga	gokulnathas@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	A. GOKULNATH	GA	gokulnatha@tgac.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	B. ARJUNAN	ab	gokulnathabgs@gmail.com		<input checked="" type="checkbox"/>	School profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d2w00000rjwroead.inubhne3b1c@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	K. PANTHAL	pk	gokulna@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	M. SUJITH	sm	gokulnath@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	User, Integration	integ	integration@00d2w00000rjwroead.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User, Security	sec	insightssecurity@00d2w00000rjwroead.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## Permission sets

The screenshot shows the Salesforce Setup interface for a permission set named 'Principal permissions'. The left sidebar contains a search bar with 'permis' and a list of categories: Users, Permission Set Groups, Permission Sets (selected), and Custom Code. The main content area has a header 'SETUP Permission Sets' and a sub-header 'Permission Set Principal permissions'. Below this is a search bar 'Find Settings...' and buttons 'Clone', 'Edit Properties', and 'Manage Assignments'. A 'Permission Set Overview' table lists details: Description, License, Session Activation Required (checkbox), Last Modified By (GOKULNATH A, 29/03/2023, 1:14 pm), API Name, Namespace Prefix, and Created By (GOKULNATH A, 29/03/2023, 1:14 pm). Below the table is an 'Apps' section and an 'Assigned Apps' section with the text 'Settings that specify which apps are visible in the app menu'.

Search Setup

Setup Home Object Manager

permis

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  
Principal permissions

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Principal_permissions
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	GOKULNATH A, 29/03/2023, 1:14 pm
Last Modified By	GOKULNATH A, 29/03/2023, 1:14 pm	

Apps

Assigned Apps  
Settings that specify which apps are visible in the app menu

The screenshot shows the Salesforce Setup interface for a permission set named 'teacher permission'. The left sidebar is identical to the previous screenshot, with 'Permission Sets' selected. The main content area has a header 'SETUP Permission Sets' and a sub-header 'Permission Set teacher permission'. Below this is a search bar 'Find Settings...' and buttons 'Clone', 'Edit Properties', and 'Manage Assignments'. A 'Permission Set Overview' table lists details: Description, License, Session Activation Required (checkbox), Last Modified By (GOKULNATH A, 29/03/2023, 1:06 pm), API Name, Namespace Prefix, and Created By (GOKULNATH A, 29/03/2023, 1:06 pm). Below the table is an 'Apps' section and an 'Assigned Apps' section with the text 'Settings that specify which apps are visible in the app menu'.

Search Setup

Setup Home Object Manager

permis

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  
teacher permission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	teacher_permission
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	GOKULNATH A, 29/03/2023, 1:06 pm
Last Modified By	GOKULNATH A, 29/03/2023, 1:06 pm	

Apps

Assigned Apps  
Settings that specify which apps are visible in the app menu

## Reports

Salesforce Reports Interface (Recent Reports):

Search: Search recent reports... [New Report] [New Folder] [Settings]

Report Name	Description	Folder	Created By	Created On	Subscribed
School&College		Private Reports	GOKULNATH A	29/3/2023, 1:25 pm	

Left Sidebar:

- REPORTS
  - Recent
  - Created by Me
  - Private Reports
  - Public Reports
  - All Reports
- FOLDERS
  - All Folders
  - Created by Me

Salesforce Report View (School&College):

Report: Schools with Students **School&College** [Enable Field Editing] [Search] [Add Chart] [Filter] [Refresh] [Edit]

Total Records	Total Number of students	Total Class	Total Marks	Total Highest Marks
0	0	0	0	0

No Results

(5) WhatsApp

Recently Viewed | Schools | Sales

Dashboards | Salesforce

+

thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gmail

YouTube

Maps

WhatsApp

School Management

Schools

Students

Parents

Reports

Dashboards

Dashboards

Recent

1 item

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

Dashboard N...

Description

Folder

Created By

Created On

Subscribed

Schools & Colleges

Schools & Colleges

Private Dashboards

GOKULNATH A

29/3/2023, 1:27 pm

(5) WhatsApp

Recently Viewed | Schools | Sales

Schools & Colleges | Salesforce

+

thiruvalluvargovernmentar-b-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w00000W36zEAC/view?queryScope=userFolders

Gmail

YouTube

Maps

WhatsApp

School Management

Schools

Students

Parents

Reports

Dashboards

Dashboard

Schools & Colleges

Schools & Colleges

Last refreshed 13 days ago. Refresh this dashboard to see the latest data.

As of 29-Mar-2023, 8:59 pm-Viewing as GOKULNATH A

Refresh

Edit

Subscribe

School&College

To view this table, refresh the dashboard.

## 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/gokulabgs>

Team Member 1 - <http://trailblazer.me/id/liviriya12>

Team Member 2 - <https://trailblazer.me/id/jeevr14>

Team Member 3 - <http://trailblazer.me/id/nandhini77>

## 5 ADVANTAGES & DISADVANTAGE

### ADVANTAGES

- Improve and manages Student Admissions...
- Track Student Life-Cycles Within the Institution...
- Keep Alumni Information Safe and Accessible...
- Monitor Fee Payments and Reminders...
- Track and Gain Insight on Organization-Wide Data and Processes...
- Reduce Operational Costs.
- Handle Student Enquiries.
- Streamline Teacher Evaluations.
- Build Long Lasting Alumni Relations.
- MIS(Management Information System) Reports

### DISADVANTAGES

- Customer experience may worsen due to staff over-reliance on the system.
- Security and data protection issues with centralised data.
- The excess initial time and productivity cost at the implementation.
- Requires a process-driven sales organisation.
- CRM may not suit all businesses.
- Burdensome data entry
- Dependent on proper setup
- Focused on the wrong person
- Can be costly
- A waste of time if used incorrectly

## 6 APPLICATIONS

Can be used in educational institutions, employment-based industries, hospitals and etc.

- Generate and manage website traffic.
- Qualify leads and respond to inquiries.
- Manage applications and qualify leads for admission.
- Providing you with chatbots or live chat to help you gather student feedback or their queries in real-time.
- Empowering students to book appointments with ease to follow up on their queries.

- Enabling you to use email automation to connect with students in an instant, whether it's marketing messages or news.
- Allows us to even analyse about the institution.

## **7 CONCLUSION**

Customer Relationship Management 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. However, in order to be successful in these aims, the different company departments have to work together and use measures in a coordinated fashion. This purpose is achieved via a customer database which is analysed and updated using CRM software.

This approach will be of particular interest to companies and institutions operating in highly competitive markets where it is difficult to attract new customers.

## **8 FUTURE SCOPE**

- A.I based CRM's
- Automated of completion of tasks
- Advances teaching and learning patterns
- Customization and personalization
- Better communication