

PROJECT REPORT

NM2023TMID06512

A CRM APPLICATION FOR SCHOOL & COLLEGES

1 INTRODUCTION

1.1 Overview

A software project called a CRM application for schools and colleges entails the creation of a system to control communications with professors, parents, and students. This system often contains tools for managing academic records, tracking student enrolment, storing student data, and analyzing student behavior to enhance learning outcomes and procedures.

The development of a user-friendly, safe, and efficient system for managing student connections and improving educational results is a difficult project that calls for cooperation between stakeholders, developers, and end users. This is especially true for CRM applications for schools and colleges.

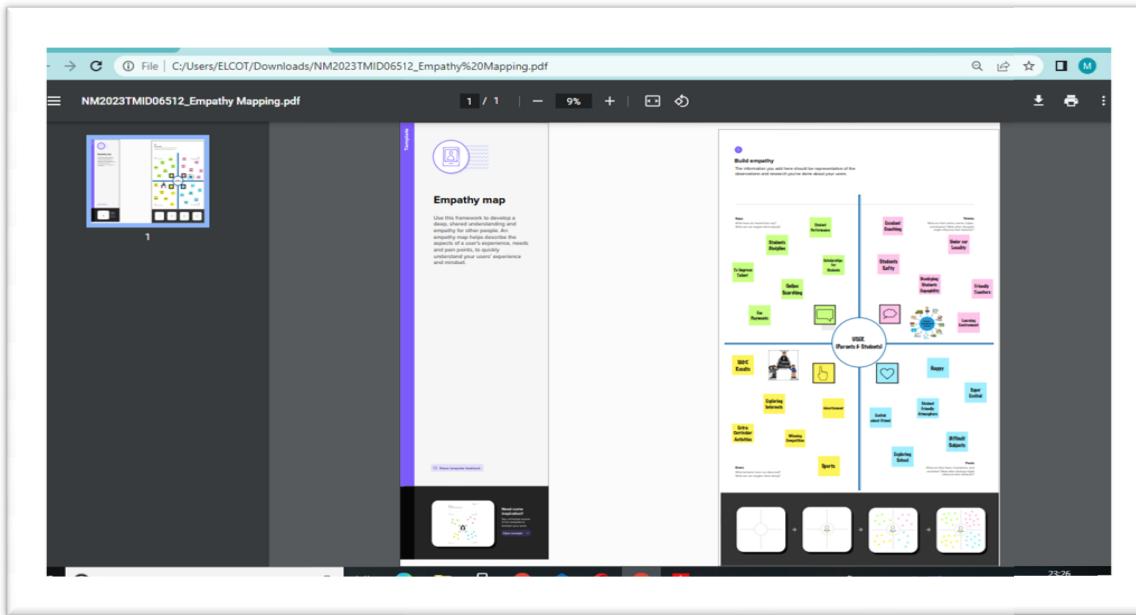
1.2 Purpose

USES: The use of a CRM application can help schools and colleges to streamline their operations, improve efficiency, and enhance the overall student experience. It can also help to build stronger relationships with students, parents, and alumni, which can be beneficial for the long-term success of the institution.

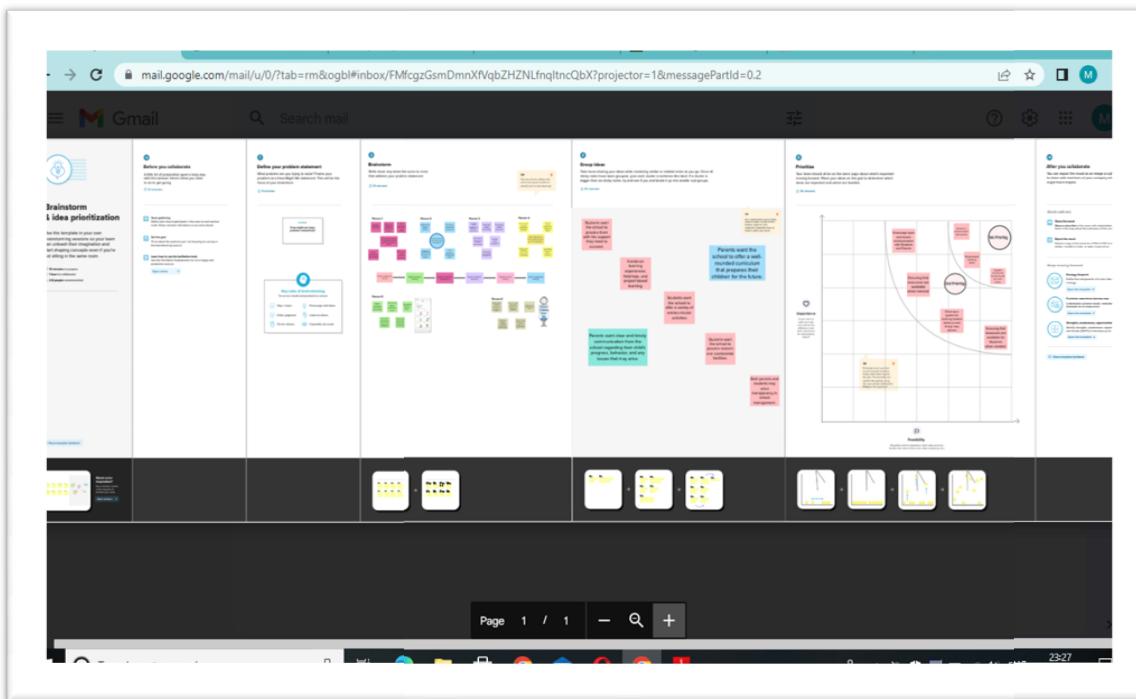
A CRM (Customer Relationship Management) application can be a powerful tool for schools and colleges to achieve a variety of objectives related to student enrollment, admissions, communications, and alumni relations.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

<i>Object name</i>	<i>Fields in the Object</i>	
	<i>Field label</i>	<i>Data type</i>
<i>School</i>	1. Address	Text Area
	2. District	Text Area
	3. State	Text Area
	4. School Website	Text Area
	5. Phone Number	Phone
	6. Number of Student	Roll-up Summary
	7. Highest Marks	Roll-up Summary
<i>Student</i>	<i>Field label</i>	<i>Data type</i>
	1. Phone Number	Phone
	2. School	Master-Detail Relationship
	3. Result	Picklist
	4. Class	Number
<i>Parent</i>	<i>Field label</i>	<i>Data type</i>
	1. Parent Address	Text Area
	2. Parent Number	Phone

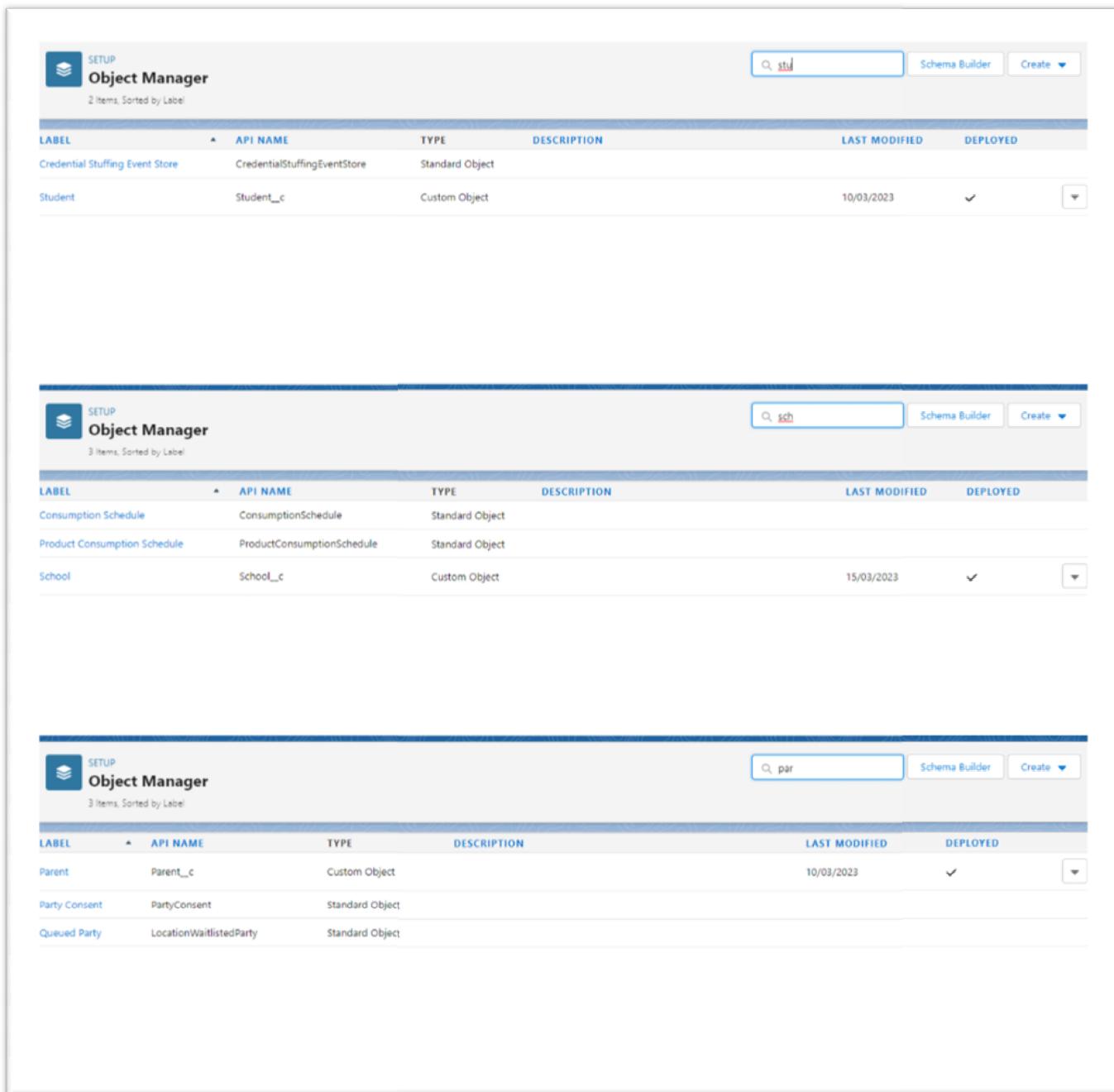
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3.2 Activity & Screenshot

Screenshots of project activity

1. Object



The screenshots show the Salesforce Object Manager interface, which lists custom objects created by the user.

Screenshot 1 (Top): A search bar contains "stu". The table shows two objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object			
Student	Student__c	Custom Object		10/03/2023	✓

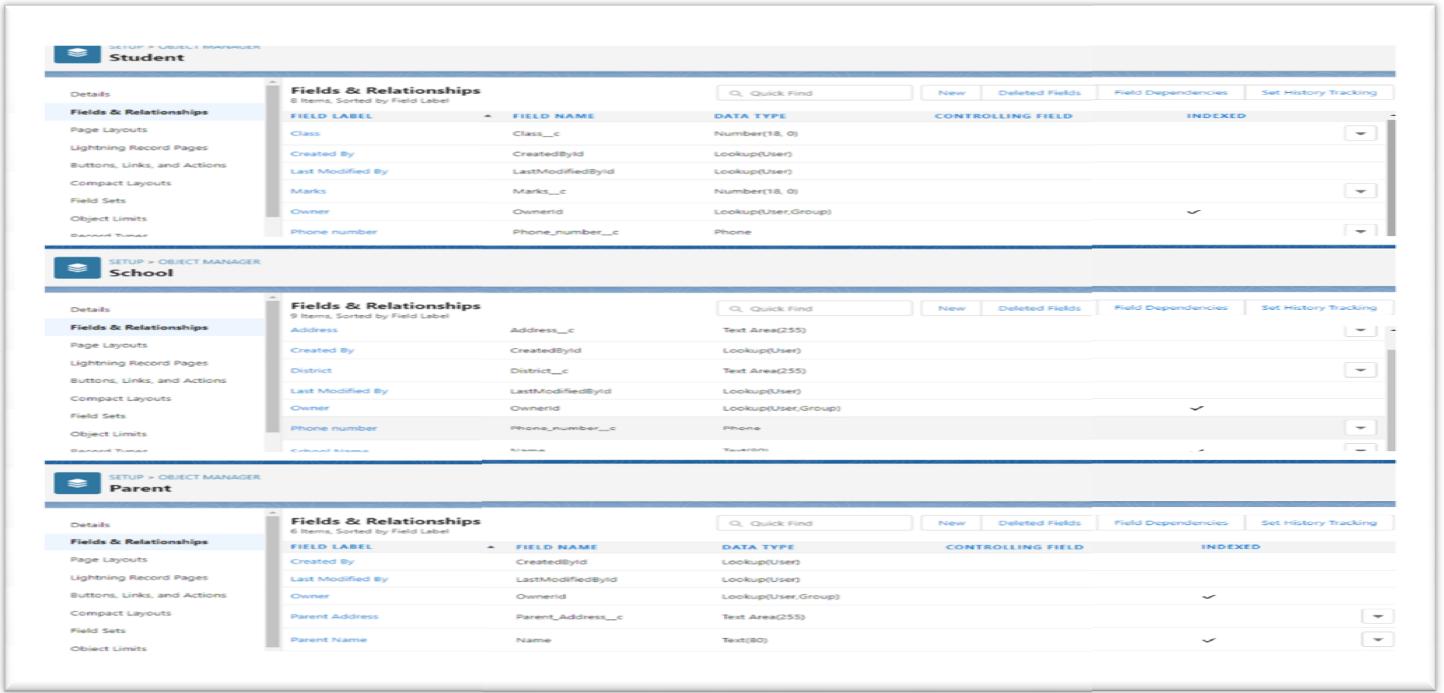
Screenshot 2 (Middle): A search bar contains "sch". The table shows three objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Consumption Schedule	ConsumptionSchedule	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			
School	School__c	Custom Object		15/03/2023	✓

Screenshot 3 (Bottom): A search bar contains "par". The table shows three objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		10/03/2023	✓
Party Consent	PartyConsent	Standard Object			
Queued Party	LocationWaitlistedParty	Standard Object			

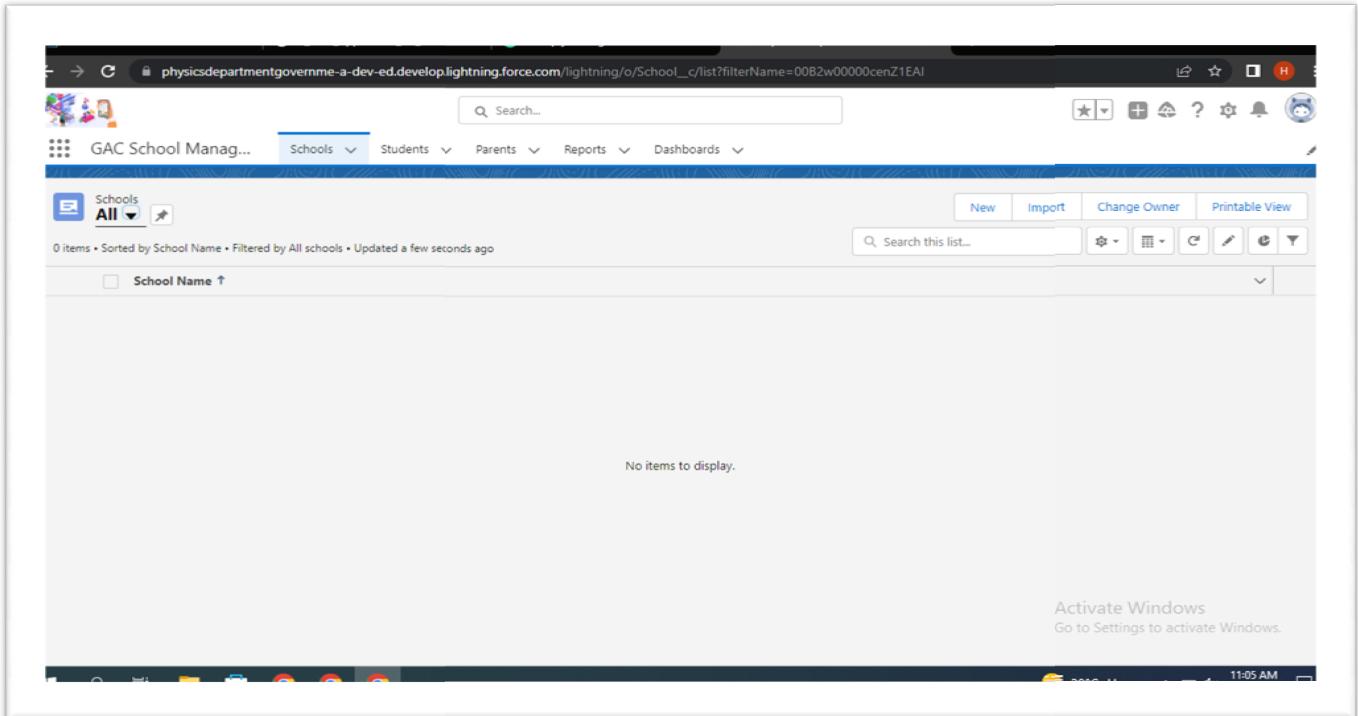
2. Fields and Relationship



The screenshots show the Salesforce Setup interface for three custom objects: Student, School, and Parent. Each screen displays the 'Fields & Relationships' section with a table of fields, their labels, names, data types, controlling fields, and indexing status.

Object	Field Label	Field Name	Data Type	Controlling Field	Indexed
Student	Class	Class__c	Number(18, 0)		
	Created By	CreatedById	Lookup(User)		
	Last Modified By	LastModifiedById	Lookup(User)		
	Marks	Marks__c	Number(18, 0)		
	Owner	OwnerId	Lookup(User, Group)		
School	Address	Address__c	Text Area(255)		
	Created By	CreatedById	Lookup(User)		
	District	District__c	Text Area(255)		
	Last Modified By	LastModifiedById	Lookup(User)		
	Owner	OwnerId	Lookup(User, Group)		
Parent	Phone number	Phone_number__c	Phone		
	Parent Address	Parent_Address__c	Text Area(255)		
	Parent Name	Name	Text(80)		

3. Lighting App

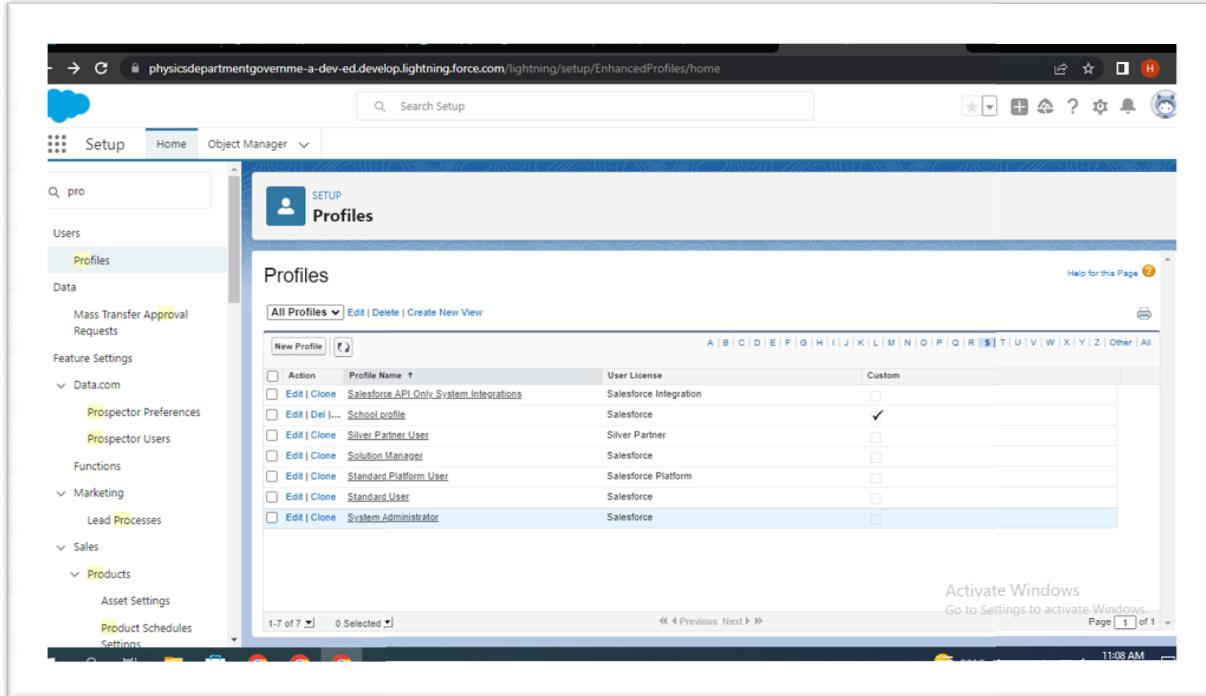


The screenshot shows the GAC School Management app's Schools list page. The top navigation bar includes links for Schools, Students, Parents, Reports, and Dashboards. The main content area displays a table with columns for School Name, Status, and Actions. A search bar at the top right allows filtering by school name. A message at the bottom right encourages activating Windows.

School Name	Status	Action
No items to display.		

Activate Windows
Go to Settings to activate Windows.

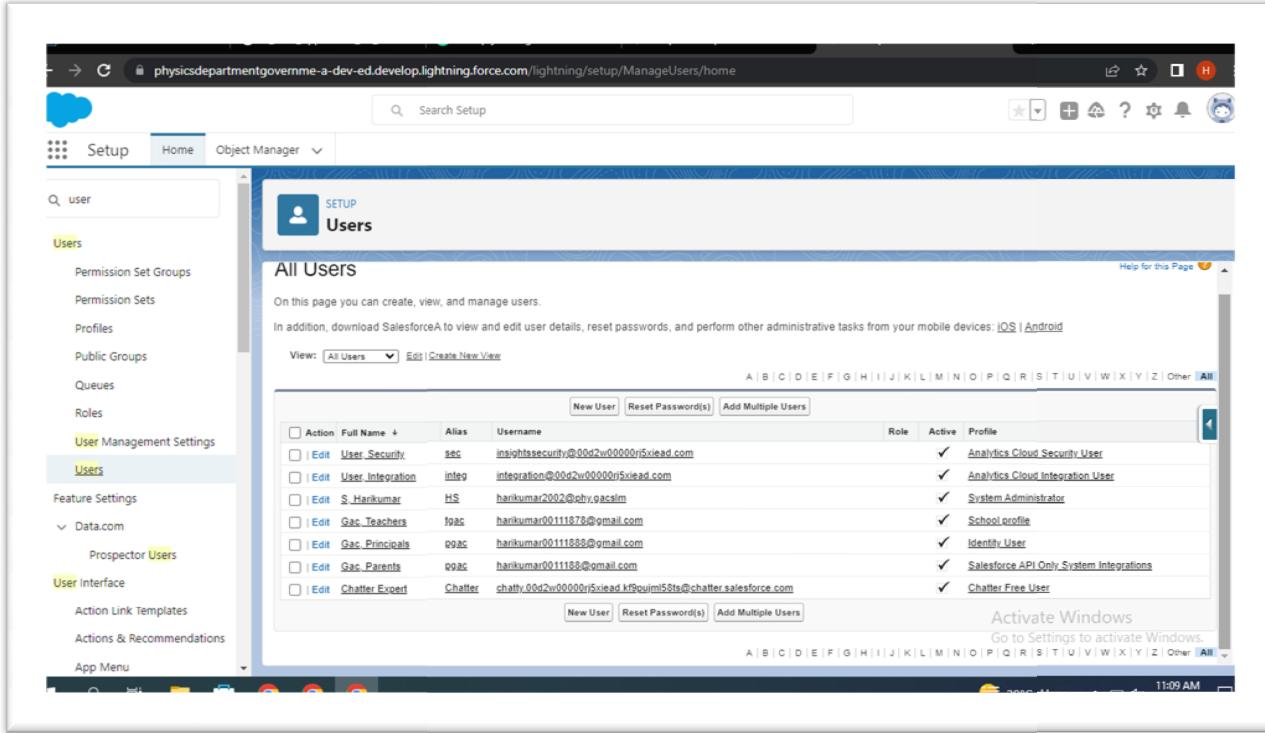
4. Profile



The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes options like Mass Transfer Approval Requests, Feature Settings, Data.com, Marketing, Lead Processes, Sales, and Products. The main content area displays a table of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	School profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

5. User



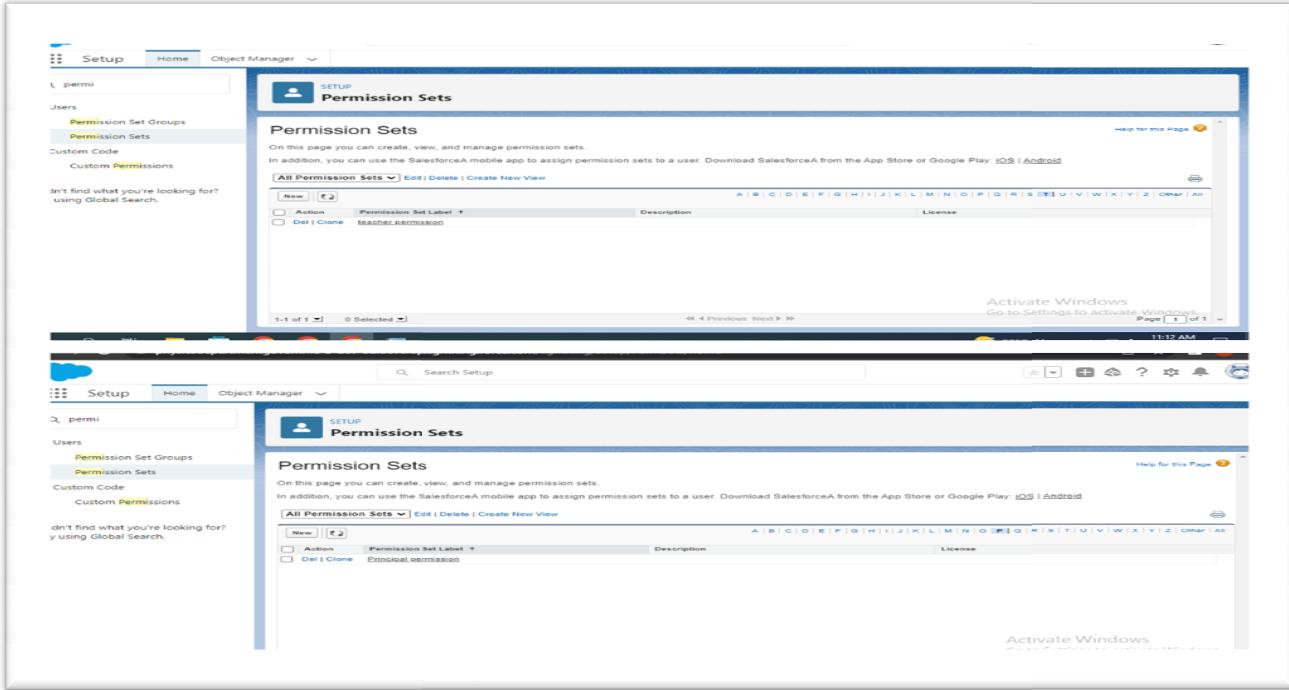
The screenshot shows the Salesforce Setup interface under the Users section. The left sidebar includes options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a detailed Users section. The main content area displays a table of users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d2w00000r5xiead.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	User_Integration	integ	integration@00d2w00000r5xiead.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	S_Harikumar	HS	harikumar2002@objy.gacslm		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Gac_Teachers	jras	harikumar00111878@gmail.com		<input checked="" type="checkbox"/>	School profile
<input type="checkbox"/>	Gac_Principals	rgas	harikumar00111888@gmail.com		<input checked="" type="checkbox"/>	Identify User
<input type="checkbox"/>	Gac_Parents	rgas	harikumar00111888@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d2w00000r5xiead.kf9quimj50ts@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User

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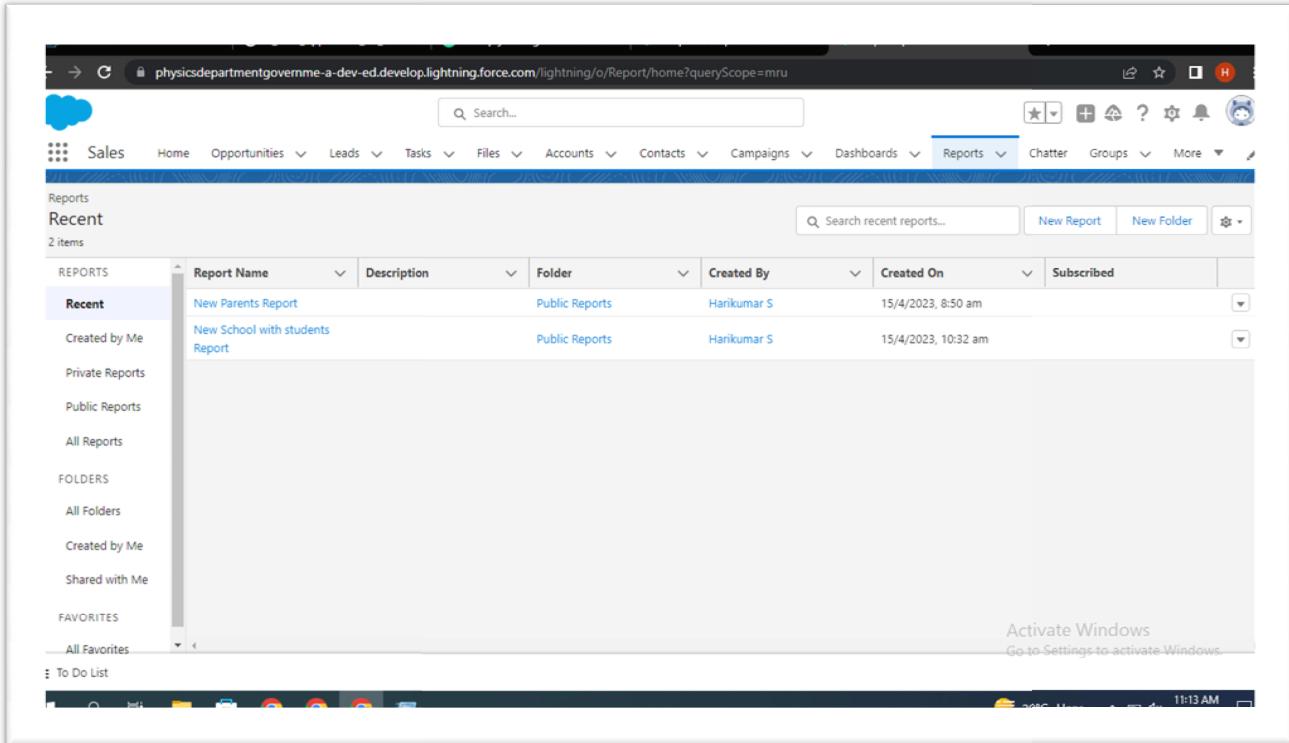
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6. Permission Set



Action	Permission Set Label	Description	License
<input type="checkbox"/>	teacher permission		
<input type="checkbox"/>	principal permission		

7. Report



Report Name	Description	Folder	Created By	Created On	Subscribed
New Parents Report	Public Reports	Harikumar S	15/4/2023, 8:50 am		
New School with students Report	Public Reports	Harikumar S	15/4/2023, 10:32 am		

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4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/asree144>

Team Member 1 - <https://trailblazer.me/id/menat8>

Team Member 2 - <https://trailblazer.me/id/avelu28>

Team Member 3 - <https://trailblazer.me/id/harikumar018>

5 ADVANTAGES & DISADVANTAGE

➤ *List of advantages*

- I. *Better student engagement: By using a CRM system, schools and colleges can communicate more effectively with students and their parents, providing timely updates on academic progress, attendance, and other important information.*
- II. *Enhanced recruitment: CRM systems can help schools and colleges identify and target potential students based on their interests, demographics, and other criteria.*
- III. *Improved alumni relations: CRM systems can help schools and colleges maintain relationships with alumni by providing a centralized database of contact information and tracking their engagement with the institution.*
- IV. *Streamlined operations: CRM systems can automate many routine administrative tasks, such as scheduling appointments, tracking student inquiries, and managing event registration*
- V. *Better data analytics: CRM systems can provide schools and colleges with detailed analytics on student performance, recruitment efforts, alumni engagement, and other key metrics.*

➤ *List of disadvantage*

- I. *Cost: Implementing a CRM application can be expensive, especially for smaller schools and colleges that have limited budgets.*
- II. *Complexity: CRM applications can be complex and require significant technical expertise to implement and maintain.*
- III. *Data Privacy and Security: With the increasing importance of data privacy and security, schools and colleges need to be careful about how they collect and store sensitive information about their students and alumni.*
- IV. *Adoption and Training: For a CRM application to be effective, staff members need to be properly trained and fully adopt the system.*
- V. *Integration Challenges: Integrating a CRM application with other systems and databases can be challenging, especially if the school or college is using multiple legacy systems. This can lead to data inconsistencies and errors.*

6 APPLICATIONS

- I. *Admissions Management*
- II. *Student Management*
- III. *Alumni Management*
- IV. *Marketing and Communication*
- V. *Fundraising*
- VI. *Staff Management*

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7 CONCLUSION

To summarize, a CRM (Customer Relationship Management) application can provide significant benefits for schools and colleges by helping them to streamline their operations, improve their communication with students and parents, and build stronger relationships with their stakeholders. By leveraging the power of data and automation, schools and colleges can achieve their goals more effectively and efficiently.

8 FUTURE SCOPE

- I. *Artificial Intelligence and Machine Learning: AI and machine learning are rapidly advancing fields with immense potential for the future.*
- II. *Renewable Energy: With the world's focus shifting towards sustainable energy, there is a significant future scope for renewable energy sources such as wind, solar, and hydropower.*
- III. *Biotechnology: Biotechnology has the potential to revolutionize medicine and agriculture. There is a vast scope for genetic engineering, developing new drugs, and improving crop yields.*
- IV. *Internet of Things (IoT): IoT has the potential to connect all devices and systems, enabling them to communicate and work together.*
- V. *Quantum Computing: Quantum computing is a promising technology that can revolutionize computing, cryptography, and*

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data security. Personalized Communication: CRM applications can help schools and colleges to personalize their communication with students and parents.

- VI. *Gamification: Gamification can be used to encourage students to engage with the CRM application, such as through badges or points for completing certain tasks.*
- VII. *Mobile Access: As mobile devices become more ubiquitous, CRM applications for schools and colleges will need to be optimized for mobile access.*

Overall, the future scope of using a CRM application in schools and colleges is promising, as technology continues to advance and new features and functionalities are developed.