

## ***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.*

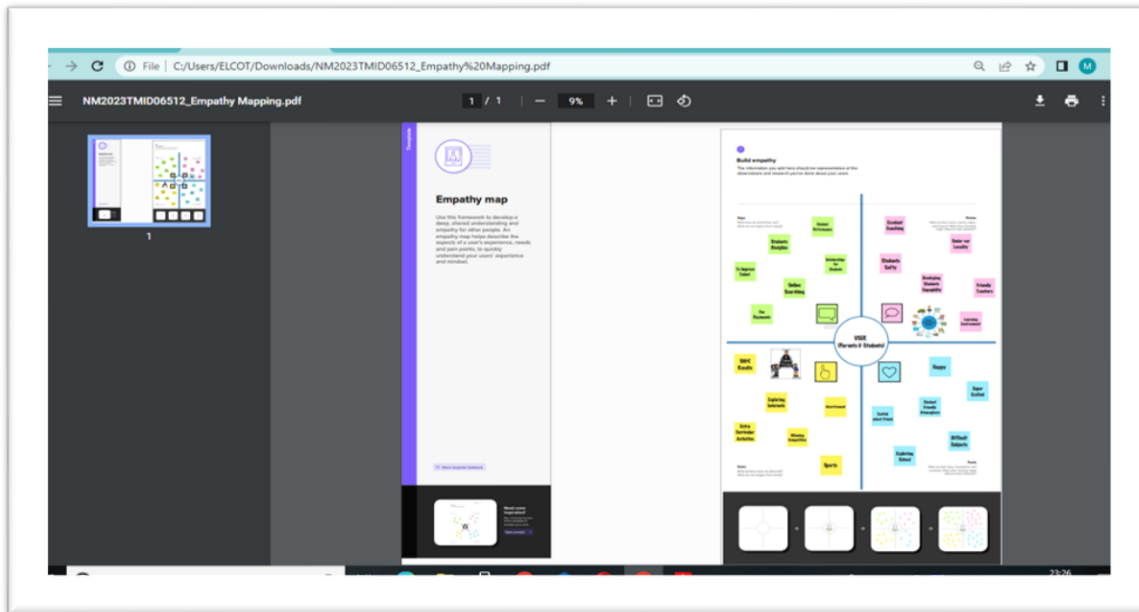
#### ***1.2 Purpose***

*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.*

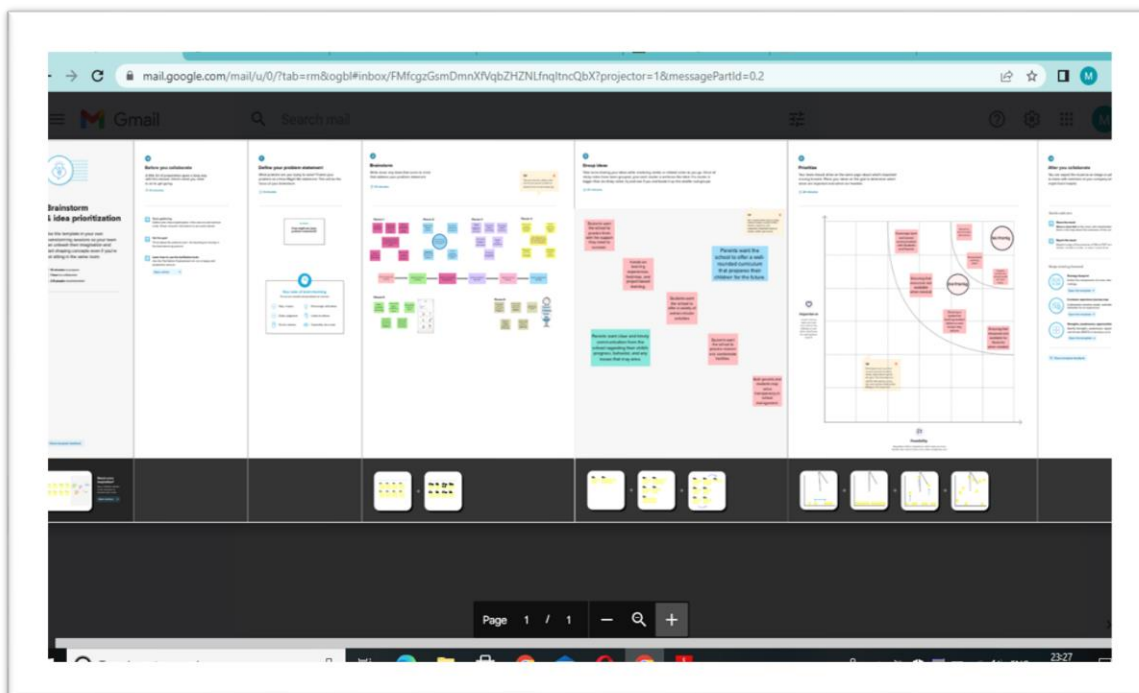
*A CRM (Customer Relationship Management) application can be a powerful tool for schools and colleges to achieve a variety of objectives related to student enrollment, admissions, communications, and alumni relations.*

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



### 2.2 Ideation & Brainstorming Map



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## 3 RESULT


### 3.1 Data Model:

Object name	Fields in the Object	
<b>School</b>	<b>Field label</b>	<b>Data type</b>
	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
<b>Student</b>	<b>Field label</b>	<b>Data type</b>
	1. Phone Number	Phone
	2. School	Master-Detail Relationship
	3. Result	Picklist
	4. Class	Number
	5. Marks	Number
<b>Parent</b>	<b>Field label</b>	<b>Data type</b>
	1. Parent Address	Text Area
	2. Parent Number	Phone

## 3.2 Activity & Screenshot


### Screenshots of project activity

#### 1. Object


**SETUP  
Object Manager**  
2 Items, Sorted by Label


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

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**SETUP  
Object Manager**  
3 Items, Sorted by Label

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	✓

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**SETUP  
Object Manager**  
3 Items, Sorted by Label

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			

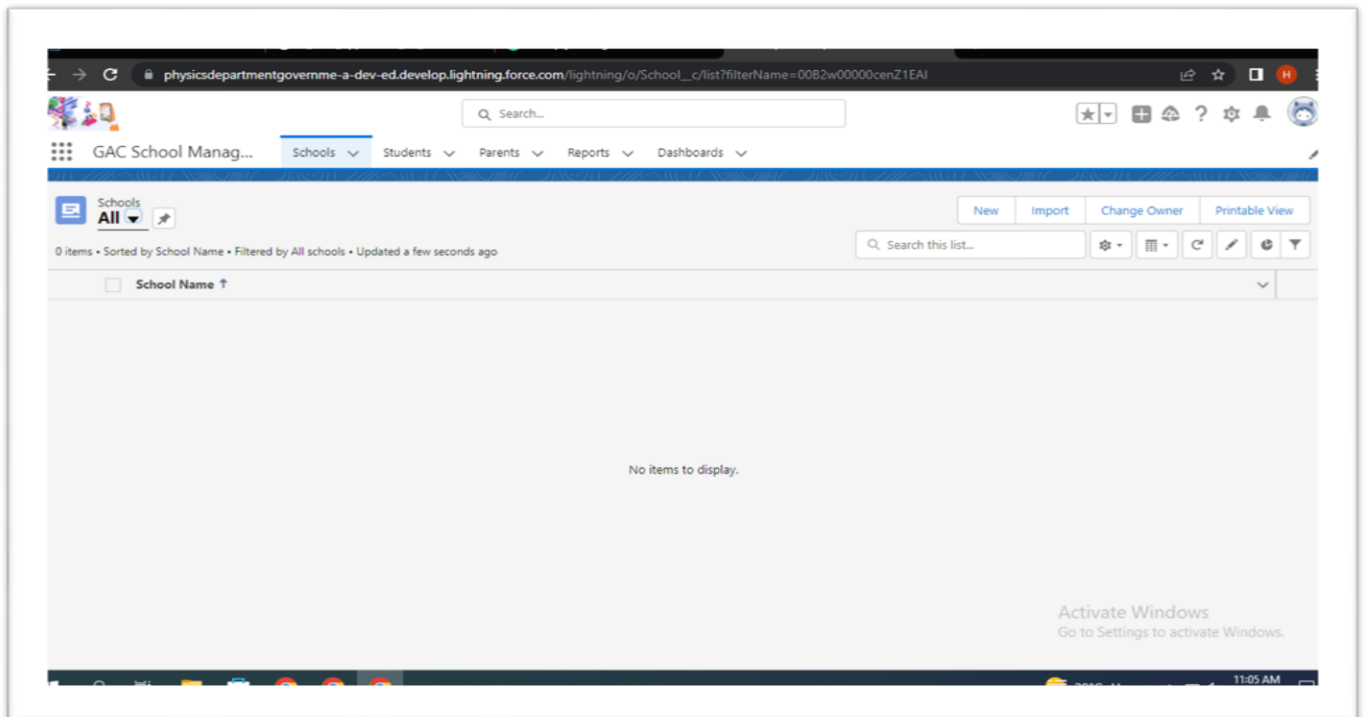
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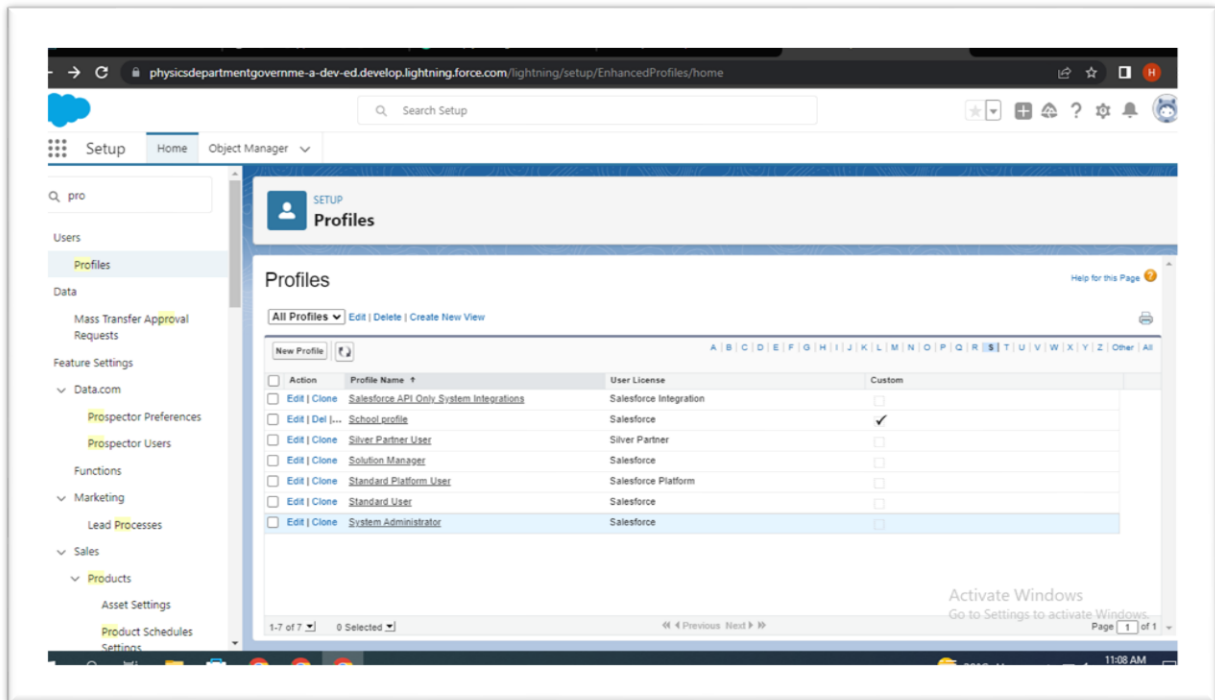
## 2. Fields and Relationship

<b>Student</b>				
<b>Fields &amp; Relationships</b> 8 Items, Sorted by Field Label	Q, Quick Find	New	Deleted Fields	Field Dependencies
Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Wizard Tools	<b>FIELD LABEL</b> Class Created By Last Modified By Marks Owner Phone number	<b>FIELD NAME</b> Class__c CreatedById LastModifiedById Marks__c OwnerId Phone_number__c	<b>DATA TYPE</b> Number(18, 0) Lookup(User) Lookup(User) Number(18, 0) Lookup(User,Group) Phone	<b>CONTROLLING FIELD</b>       
				<b>INDEXED</b>       
<b>School</b>				
<b>Fields &amp; Relationships</b> 9 Items, Sorted by Field Label	Q, Quick Find	New	Deleted Fields	Field Dependencies
Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Wizard Tools	<b>FIELD LABEL</b> Address Created By District Last Modified By Owner Phone number	<b>FIELD NAME</b> Address__c CreatedById District__c LastModifiedById OwnerId Phone_number__c	<b>DATA TYPE</b> Text Area(255) Lookup(User) Text Area(255) Lookup(User) Lookup(User,Group) Phone	<b>CONTROLLING FIELD</b>       
				<b>INDEXED</b>       
<b>Parent</b>				
<b>Fields &amp; Relationships</b> 6 Items, Sorted by Field Label	Q, Quick Find	New	Deleted Fields	Field Dependencies
Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Wizard Tools	<b>FIELD LABEL</b> Created By Last Modified By Owner Parent Address Parent Name	<b>FIELD NAME</b> CreatedById LastModifiedById OwnerId Parent_Address__c Name	<b>DATA TYPE</b> Lookup(User) Lookup(User) Lookup(User,Group) Text Area(255) Text(80)	<b>CONTROLLING FIELD</b>      
				<b>INDEXED</b>      

## 3. Lighting App



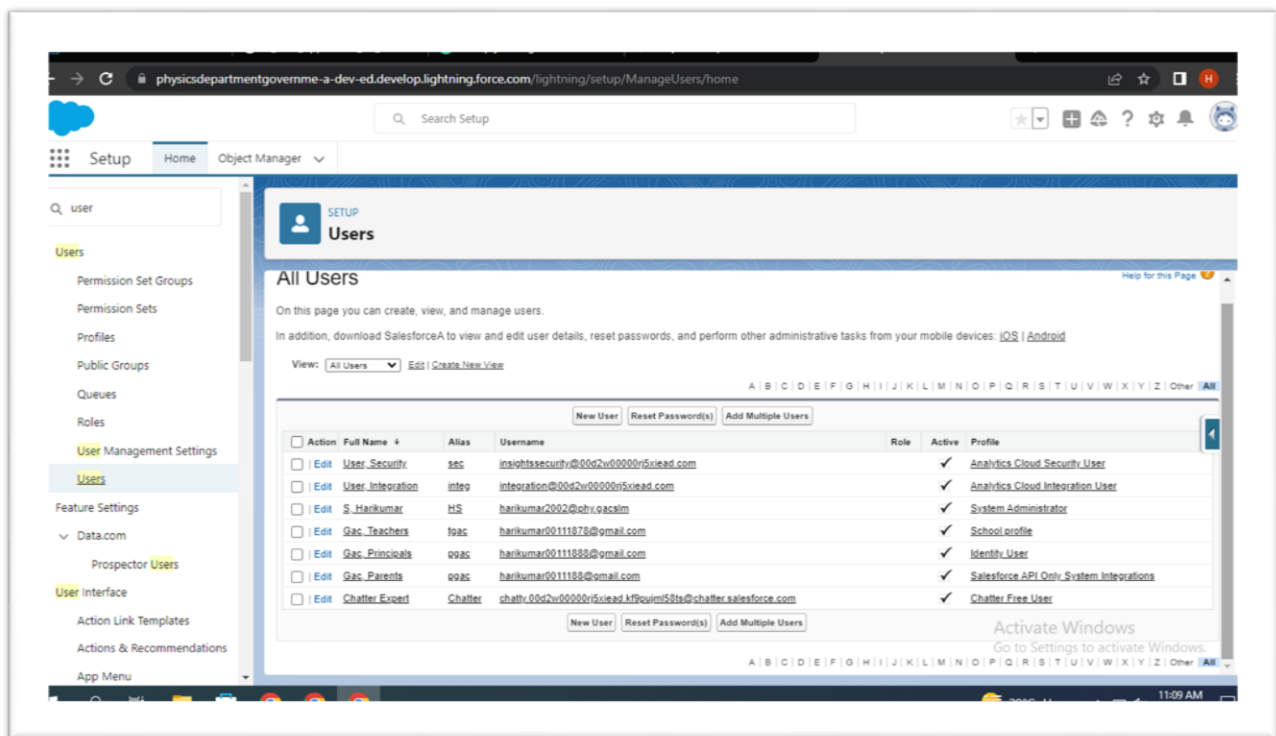
## 4. Profile



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'Profiles' and includes a table of existing profiles.

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

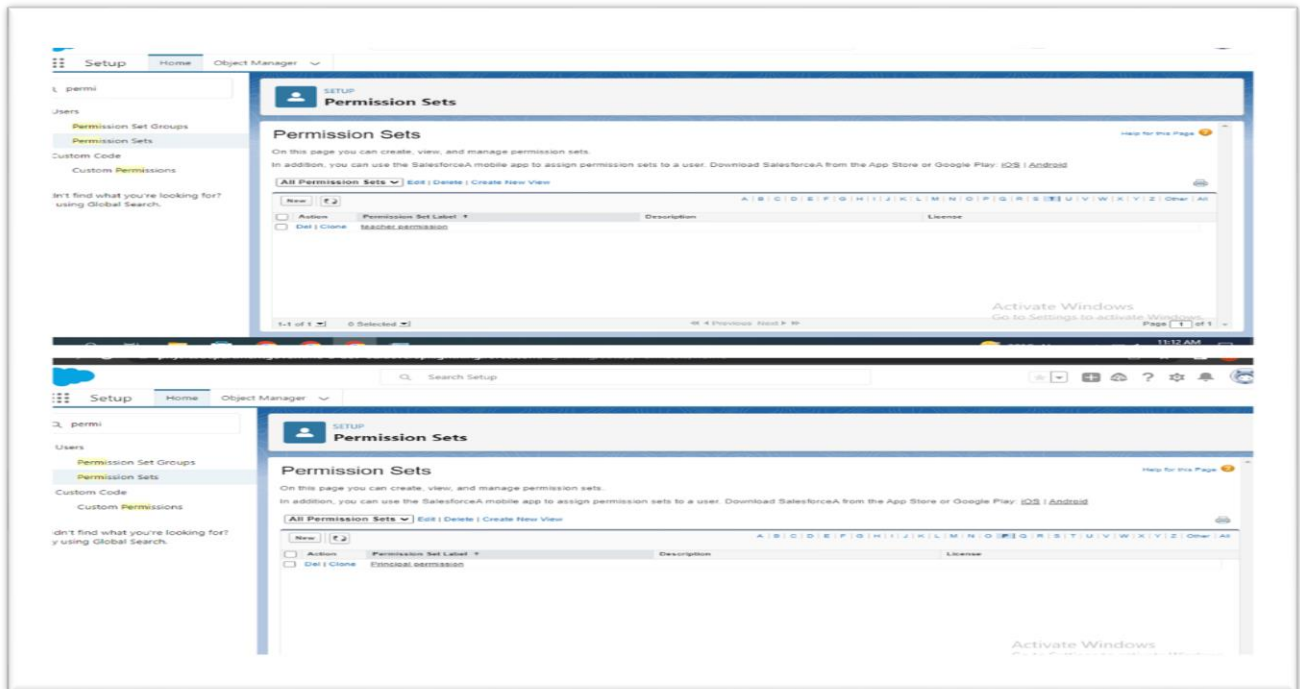
## 5. User



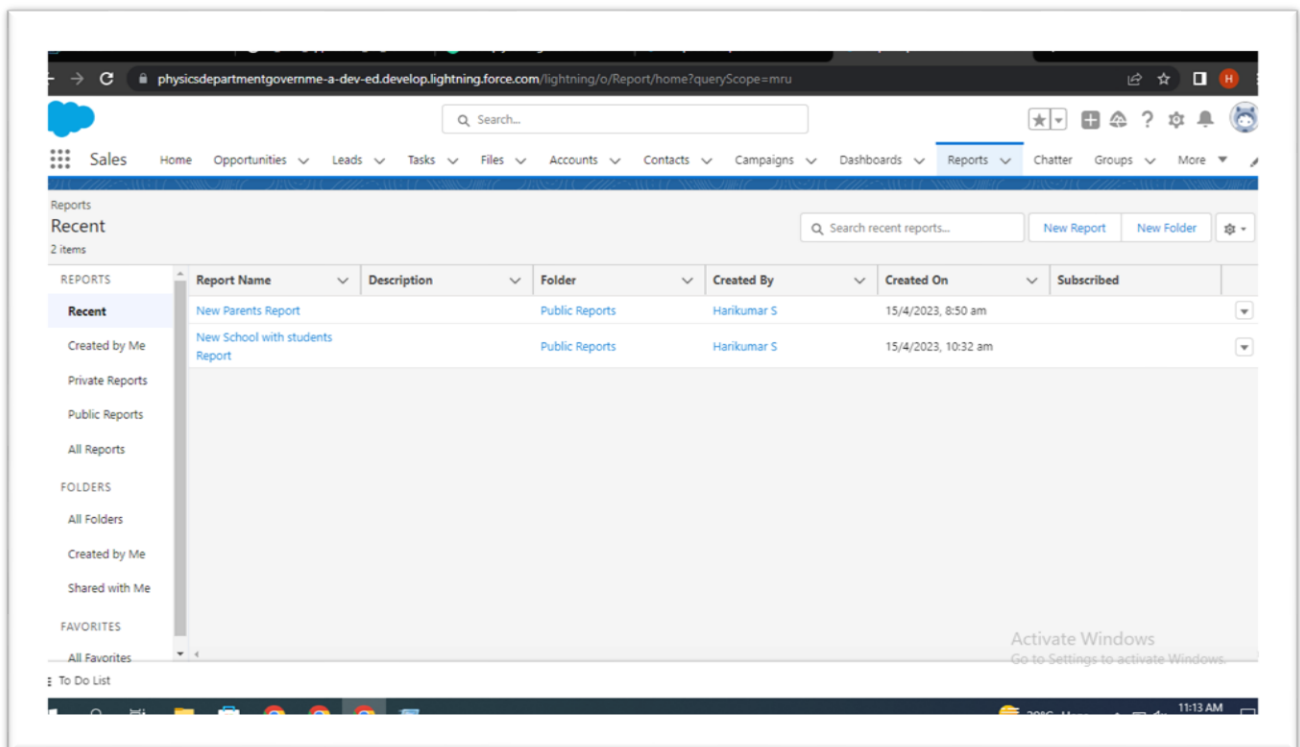
The screenshot shows the Salesforce Setup interface for Users. The left sidebar contains navigation options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'Users' and includes a table of existing users.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	User Security	sec	insightssecurity@0042v00000r5xiead.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<a href="#">Edit</a>	User Integration	integ	integration@0042v00000r5xiead.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	S. Harikumar	HS	harikumar2002@chv.gacslm		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	Gac Teachers	tpac	harikumar00111878@gmail.com		<input checked="" type="checkbox"/>	School profile
<a href="#">Edit</a>	Gac Principals	ppac	harikumar00111888@gmail.com		<input checked="" type="checkbox"/>	Identify User
<a href="#">Edit</a>	Gac Parents	ppac	harikumar00111888@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<a href="#">Edit</a>	Chatter Expert	Chatter	chathv.0042v00000r5xiead.kf9quim58ts@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User

## 6. Permission Set



## 7. Report



## 4 Trailhead Profile Public URL

- Team Lead (V. Anitha Sree) – <https://trailblazer.me/id/asree144>
- Team Member 1 (T. Menaka) – <https://trailblazer.me/id/menat8>
- Team Member 2 (V.Amala) – <https://trailblazer.me/id/avelu28>
- Team Member 3 (S.Harikumar) – <https://trailblazer.me/id/harikumar018>
- Team Member 4 (S.Rubasri) – <https://trailblazer.me/id/rsaravanan19>

## 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*

## 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.

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- V. **Quantum Computing:** *Quantum computing is a promising technology that can revolutionize computing, cryptography, and 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.*