

# **PROJECT REPORT**

## **A CRM APPLICATION FOR SCHOOLS / COLLEGES**

**TEAM ID : NM2023TMID19526**

### **1. INTRODUCTION**

#### **1.1 Overview**

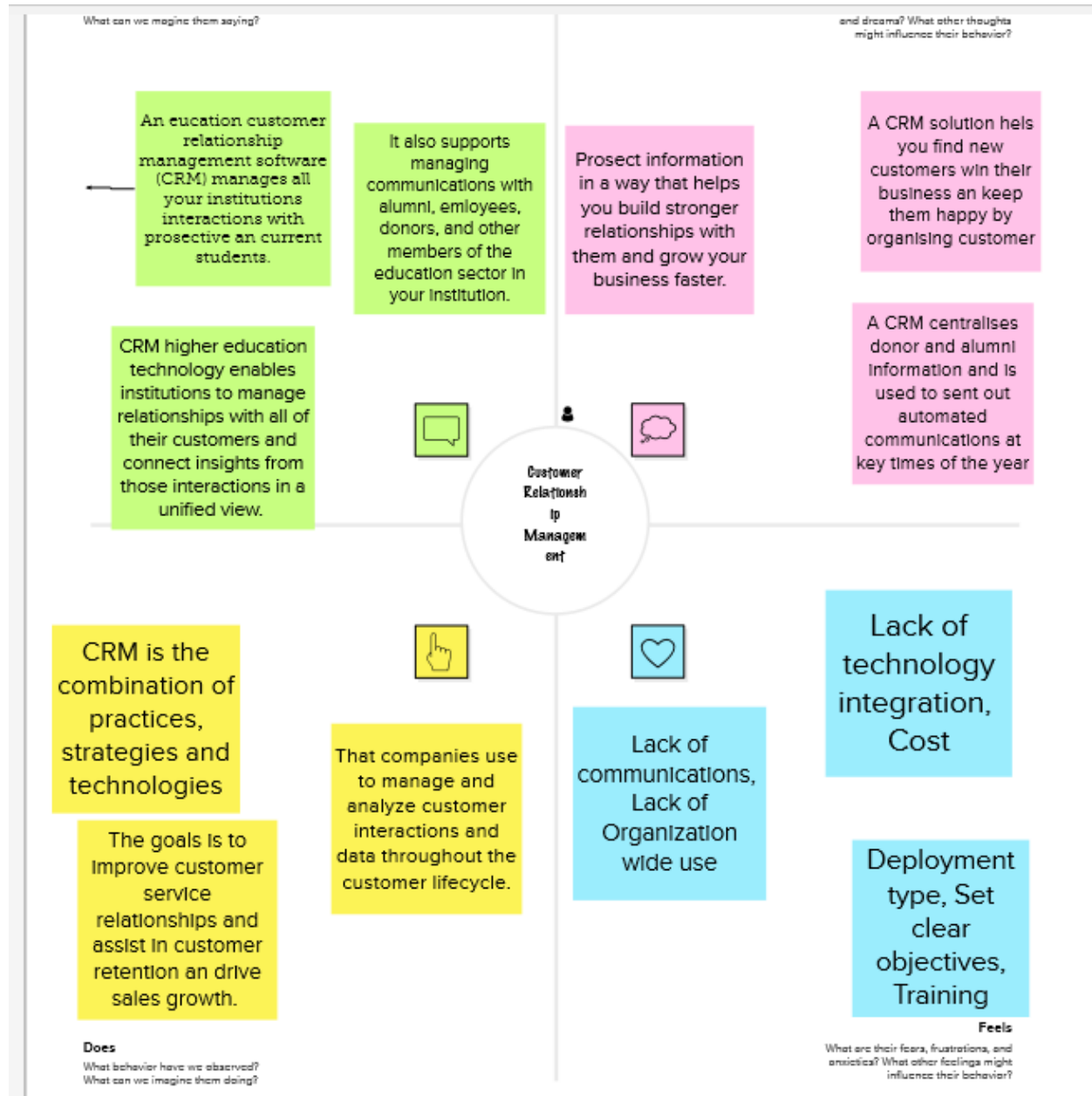
CRM is – customer relationship management. CRM higher education technology enables institutions to manage relationships with all of their customers ( including students, alumni, faculty, staff and corporate partners ) and connect insights from those interactions in a unified view.

#### **1.2 Purpose**

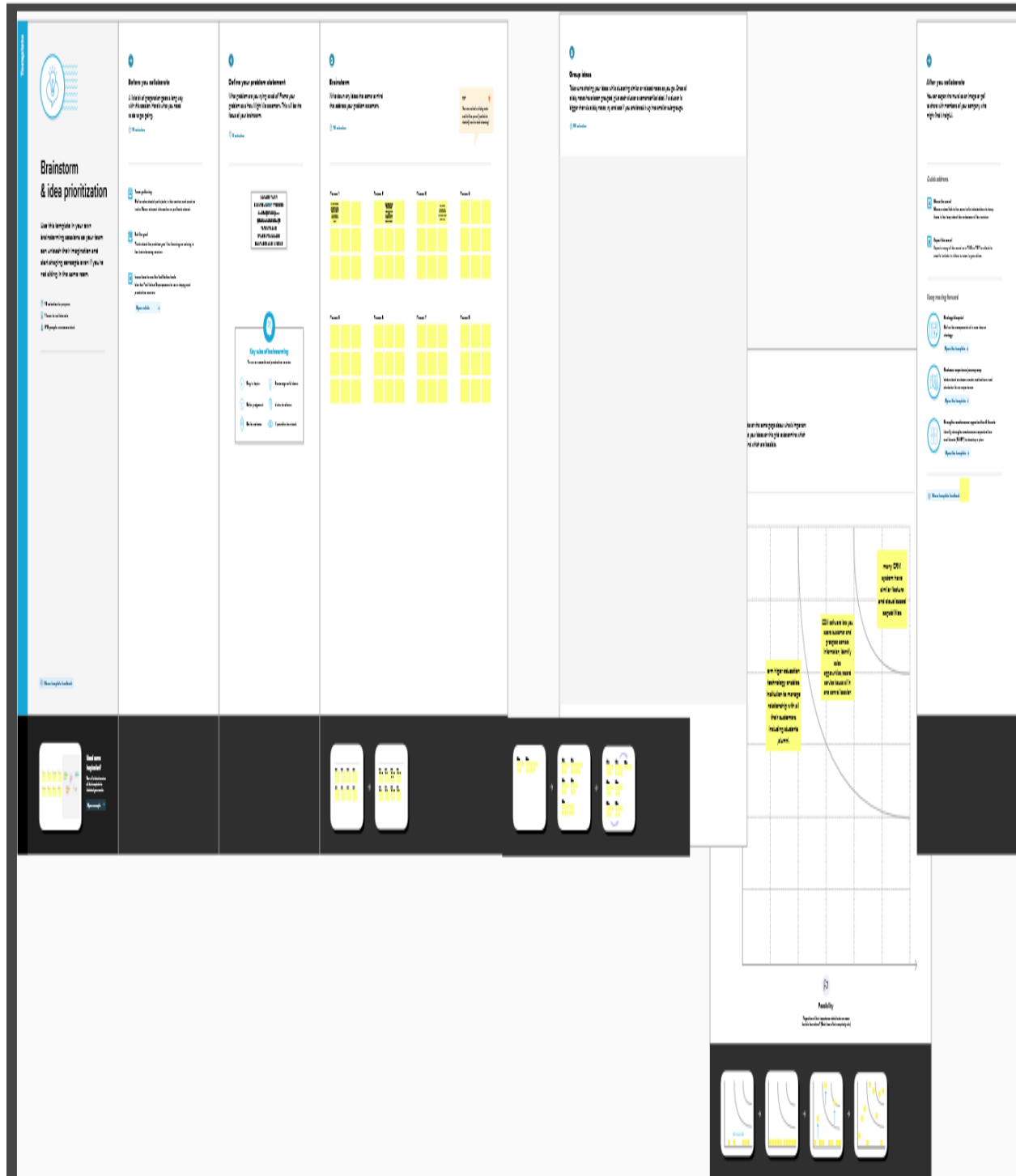
Using a CRM system provides educational organization with the data they need to make informed decisions about recruitment, marketing and other key areas. It also allows you to improve student engagement by tracking student interactions and providing personalized communication.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy map



## 2.2 Brainstorming map



### 3. RESULT

#### 3.1 Data Model

Object name	Field label	Data type
School object	Address	Text Area
	Number of students	Roll-up summary
Student object	Phone number	Phone
	Results	Picklist

#### 3.2 ACTIVITY & SCREENSHOT

salesforce

'23

Search...

Search

ARUNA S ▾SetupHelpContent ▾

HomeChatterLibrariesContentSubscriptionsschoolsstudentsparents +

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Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Gmail Integration and Sync

Email Administration

Google Apps

Analytics

Data.com Administration

Build

Customize

Create

Develop

Lightning Bolt

Schema Builder

Lightning App Builder

Canvas App Previewer

Installed Packages

Package Usage

AppExchange Marketplace

Deploy

Deployment Settings

Deployment Status

Monitor

System Overview

Optimizer

Imports

Outbound Messages

Time-Based Workflow

Automated Process Actions

Case Escalations

Entitlement Processes

API Usage Notifications

Mass Emails

Getting Started

Dismiss x

Build App

Generate a basic app with just one step, and then easily extend that app with clicks or code.

Add App

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Get Started

System Overview

Expand

You have a message.

Expand to see messages or go to the system overview page to see additional limits.

Recent Items beta

Name	Type	object
ARUNA S	User	
Collaboration	Custom App	
parent	Custom Object Definition	
students	Custom Object Definition	
school	Custom Object Definition	
school	Custom Field Definition	school
phone number	Custom Field Definition	school
State	Custom Field Definition	school
District	Custom Field Definition	school
Address	Custom Field Definition	school

Quick Links

Tools

App Quick Start

Schema Builder

New custom object

Users

New user

Add multiple users

Reset users' passwords

App

Manage apps

Manage profiles

Enable Chatter feeds

Security

New profile

New permission set

Add roles

Data

Import accounts & contacts

Import custom objects

Mass delete records

Community

Dismiss x

Resources

Collaborate & Discuss

Join the conversation.

User Groups

Connect with customers in your area.

Find Answers

Post your questions to the Community.

Ask a Question

Contribute Ideas

Share & vote for ideas to improve the product.

Post an Idea

Release Resources

Recommended Apps

Show All

Highspot Sales Enablement

by Highspot

★★★★★ (89)

Highspot and Salesforce drive consistent rep performance via sales enablement. Highspot surfaces...

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## Salesforce Mobile Quick Start

## Home

## Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

## Build

- Customize
- Create
  - Apps
  - Custom Labels
  - Interaction Log Layouts
  - Objects
    - Big Objects
    - Picklist Value Sets
    - Packages
    - Report Types
    - Tabs
    - Service Cloud Launch Pad
    - Action Link Templates
  - Global Actions
  - Workflow & Approvals
- Develop
  - Lightning Bolt
  - Schema Builder
  - Lightning App Builder
  - Canvas App Previewer
  - Installed Packages
  - Package Usage
  - AppExchange Marketplace

## Deploy

- Deployment Settings
- Deployment Status

## Monitor

- System Overview
- Optimizer
- Imports
- Outbound Messages
- Time-Based Workflow
- Automated Process Actions
- Case Escalations
- Entitlement Processes
- API Usage Notifications
- Mass Emails

## Custom Object

## parent

[Help for this Page](#)[Standard Fields](#) | [Custom Fields & Relationships](#) | [Validation Rules](#) | [Page Layouts](#) | [Field Sets](#) | [Compact Layouts](#) | [Search Layouts](#) | [Buttons, Links, and Actions](#) | [Record Types](#) | [Apex Sharing Reasons](#) | [Apex Sharing Recalculation](#) | [Object Limits](#)Custom Object Definition  
Detail[Edit](#) [Delete](#)

Singular Label	parent	Description	
Plural Label	parents	Enable Reports	<input checked="" type="checkbox"/>
Object Name	parent	Track Activities	<input type="checkbox"/>
API Name	parent__c	Allow in Chatter Groups	<input type="checkbox"/>
		Allow Sharing	<input checked="" type="checkbox"/>
		Allow Bulk API Access	<input checked="" type="checkbox"/>
		Allow Streaming API Access	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Enable Licensing	<input type="checkbox"/>
		Deployment Status	Deployed
		Allow Search	<input checked="" type="checkbox"/>
		Help Settings	Standard salesforce.com Help Window
Created By	ARUNA S.	Modified By	ARUNA S.
	22/03/2023, 12:41 pm		22/03/2023, 12:41 pm

## Standard Fields

[Standard Fields Help](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
<a href="#">Edit</a>	Owner	Owner	Lookup(User:Group)		<input checked="" type="checkbox"/>
<a href="#">Edit</a>	parent Name	Name	Text(80)		<input checked="" type="checkbox"/>

## Custom Fields &amp; Relationships

[New](#)[Field Dependencies](#)[Custom Fields & Relationships Help](#)

No custom fields defined.

## Related Lookup Filters

No related lookup filters defined.

## Validation Rules

[New](#)[Validation Rules Help](#)

No validation rules defined.

## Triggers

[New](#)[Triggers Help](#)

No triggers defined.

## Page Layouts

[New](#)[Page Layout Assignment](#)[Page Layouts Help](#)

Action	Page Layout Name	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	parent Layout	ARUNA S.	ARUNA S.
		22/03/2023, 12:42 pm	22/03/2023, 12:42 pm

## Field Sets

[New](#)[Field Sets Help](#)

No field sets defined.

## Compact Layouts

[New](#)[Compact Layout Assignment](#)[Compact Layouts Help](#)

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	<input checked="" type="checkbox"/>	

## Search Layouts

[Search Layouts Help](#)

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
<a href="#">Edit</a>	Search Results	parent Name		ARUNA S.
				22/03/2023, 12:41 pm
<a href="#">Edit</a>	Lookup Dialogs	parent Name	N/A	ARUNA S.
				22/03/2023, 12:41 pm
<a href="#">Edit</a>	Lookup Phone Dialogs	parent Name	N/A	ARUNA S.
				22/03/2023, 12:41 pm
<a href="#">Edit</a>	parents Tab	parent Name	N/A	ARUNA S.
				22/03/2023, 12:41 pm
<a href="#">Edit</a>	parents List View	N/A	New, Open in Quip, New From Document, Accept, Change Owner, Import, Change Owner, Printable View	ARUNA S.
				22/03/2023, 12:41 pm
<a href="#">Edit</a>	Search Filter Fields	N/A		ARUNA S.
				22/03/2023, 12:41 pm

## Buttons, Links, and Actions

[New Action](#)[New Button or Link](#)[Buttons, Links, and Actions Help](#)

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
<a href="#">Edit</a>	Accept	Accept			Standard page		<input type="checkbox"/>
<a href="#">Edit</a>	Clone	Clone			Standard page		<input type="checkbox"/>
<a href="#">Edit</a>	Delete	Delete			Standard page		<input type="checkbox"/>

#### **4. TRAILHEAD PROFILE PUBLIC URL**

Team lead - <https://trailblazer.me/id/aruna10426>

Team Member 1 - <https://trailblazer.me/id/amaravathy0110>

Team Member 2 - <https://trailblazer.me/id/amoks2>

Team Member 3 - <https://trailblazer.me/id/aarun146>

#### **5. ADVANTAGES & DISADVANTAGES**

##### **Advantages :**

- Track potential leads
- Handle student enquiries
- Streamline teacher evaluations
- MIS reports
- Enrich student lifecycle management
- Build long lasting alumni relations
- Monitor fee payments & remainders
- Manage admissions

## **Disadvantages**

- Lack of communication
- Lack of organization wide use
- Lack of technology integration
- Cost
- Set clear objectives
- Deployment type
- Training
- Plan out integration needs in advance

## **6. APPLICATIONS**

- ❖ The use of CRM in education industry is important for many reasons. A CRM system can help educational organizations effectively manage and track leads, resulting in improved enrolment numbers.
- ❖ Using a CRM system provides educational organization with the data they need to make informed decisions about recruitment, marketing, and other areas.



- ❖ It also allows you to improve student engagement by tracking student interactions and providing personalised communication.
- ❖ A CRM system is an essential tool for any educational organization to improve enrolments, lead management, communication and student engagement.

## **7. CONCLUSION**

From the above discussion it is clear that every educational system must adopt CRM system for the record breaking enrollments and for managing their account as well.

## **8. FUTURE SCOPE**

The goal of the future of CRM is to make integrated sales, marketing, service and commerce possible for all companies. The project has a very vast scope in future.