

# A CRM APPLICATION FOR SCHOOLS / COLLEGES

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## 1. Introduction:

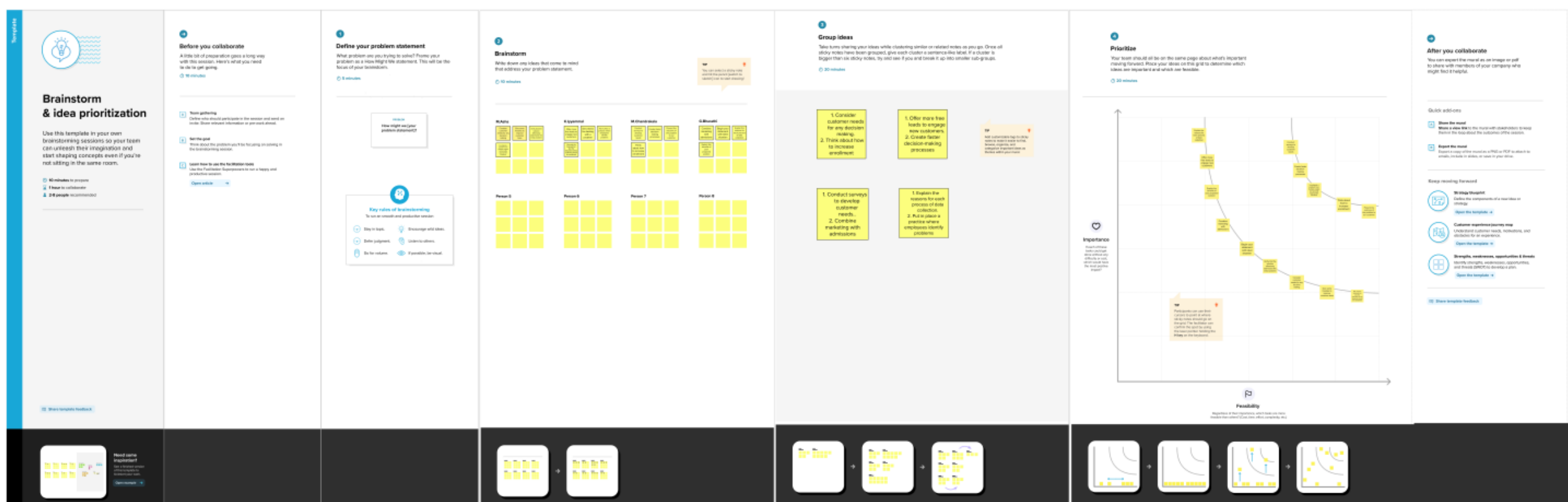
### OVERVIEW:

*This project helps to maintain and manage the school related problems with the application of customer relationship management (CRM). CRM is a technology for managing all your company's relationships and interactions with customers. Salesforce CRM is used in this project. We use salesforce software in the project because we can simply log in our salesforce accounts and it is easy to access. This project can help education professionals nurture relationships with prospects and enrollees produce data-driven insights to illustrate progress towards goals, and streamline their admissions to save time and effort. It gives education solutions effectively and efficiently schedules follow-ups for new students education. CRM will keep the students organized and provide superior customer service. During the time of new admissions, whenever a new prospective fills out the form on a website, their contact info will be automatically logged in the CRM database. This ensures that someone can follow up with the student efficiently to give them the information they need. One can easily save the email details directly from your mailbox to scheduled meetings and that will appear on your CRM calendar. Updating student contact information, creating invoices, and sending emails are all tasks that slow down your productivity. Having this school CRM project helps to reduce your manual workload by automating repetitive tasks. Invest in Student/Parent Portal Technology Manually inputting each students contact information and payment details is tiring. School CRM software with customer portal technology allows students to access their personal accounts online. These portals have all the contact information as well as details about enrollment, tuition costs, and resources. Education Businesses CRM software with mobile technology provides incredible solutions for traveling employees. We can easily access student account information or faculty meeting notes on your smart phone and tablet using this salesforce CRM project.*

### PURPOSE:

*The purpose of the project is to manage the school's enrollment and recruitment process in the easy way. To connects all the educational institutions and improve the education system. Every user is provided with fast and direct access to all client data. Students do not need to check the notice board every day and everyone will stay updated this is the main purpose of this project.*

## 2.1. Empathy Map

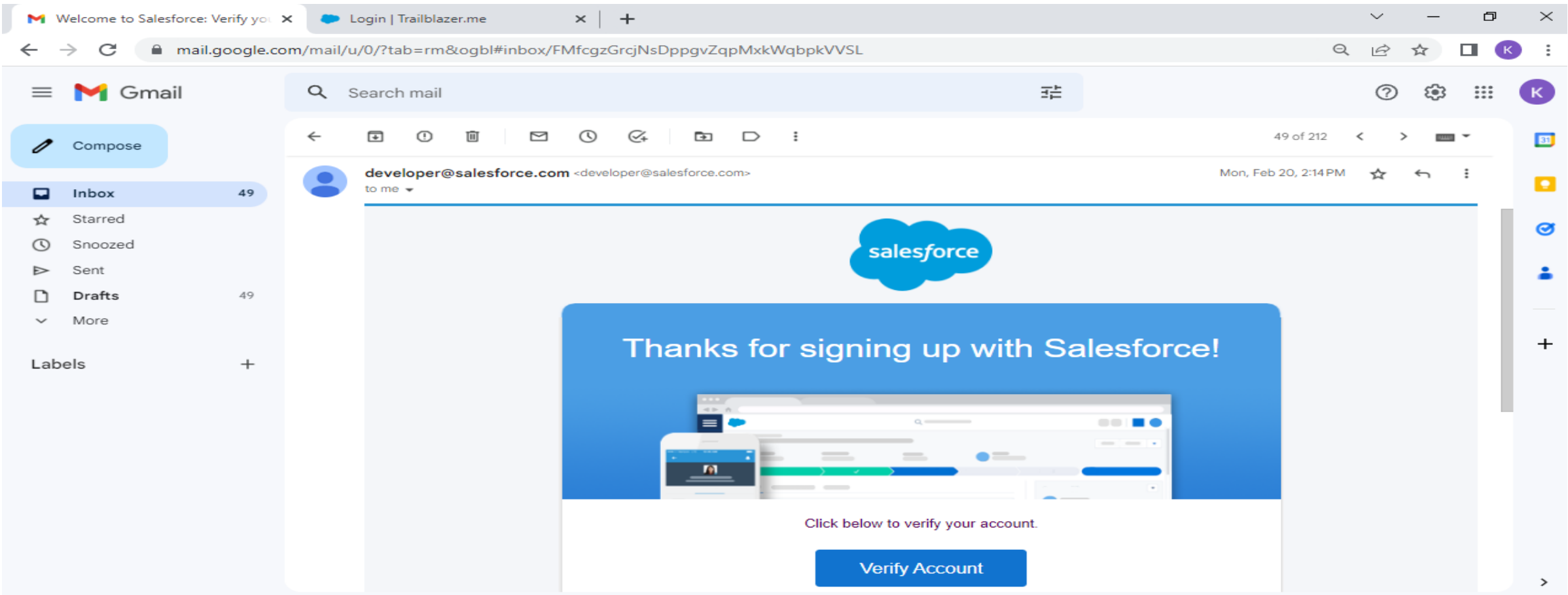


<i>Object Name</i>	<i>Fields in the object</i>	
<i>SCHOOL</i>		
	<i>Field label</i>	<i>Data Type</i>
	<i>Address</i>	<i>Text Area</i>
	<i>District</i>	<i>Text Area</i>
	<i>State</i>	<i>Text Area</i>
<i>PARENTS</i>		
	<i>Field label</i>	<i>Data type</i>
	<i>Parent Address</i>	<i>Text Area</i>
	<i>Parent Number</i>	<i>Phone</i>
<i>STUDENTS</i>		
	<i>Field label</i>	<i>Data type</i>
	<i>Phone Number</i>	<i>Phone</i>

	<i>Results</i>	<i>Pick list</i>
	<i>Class</i>	<i>Number</i>

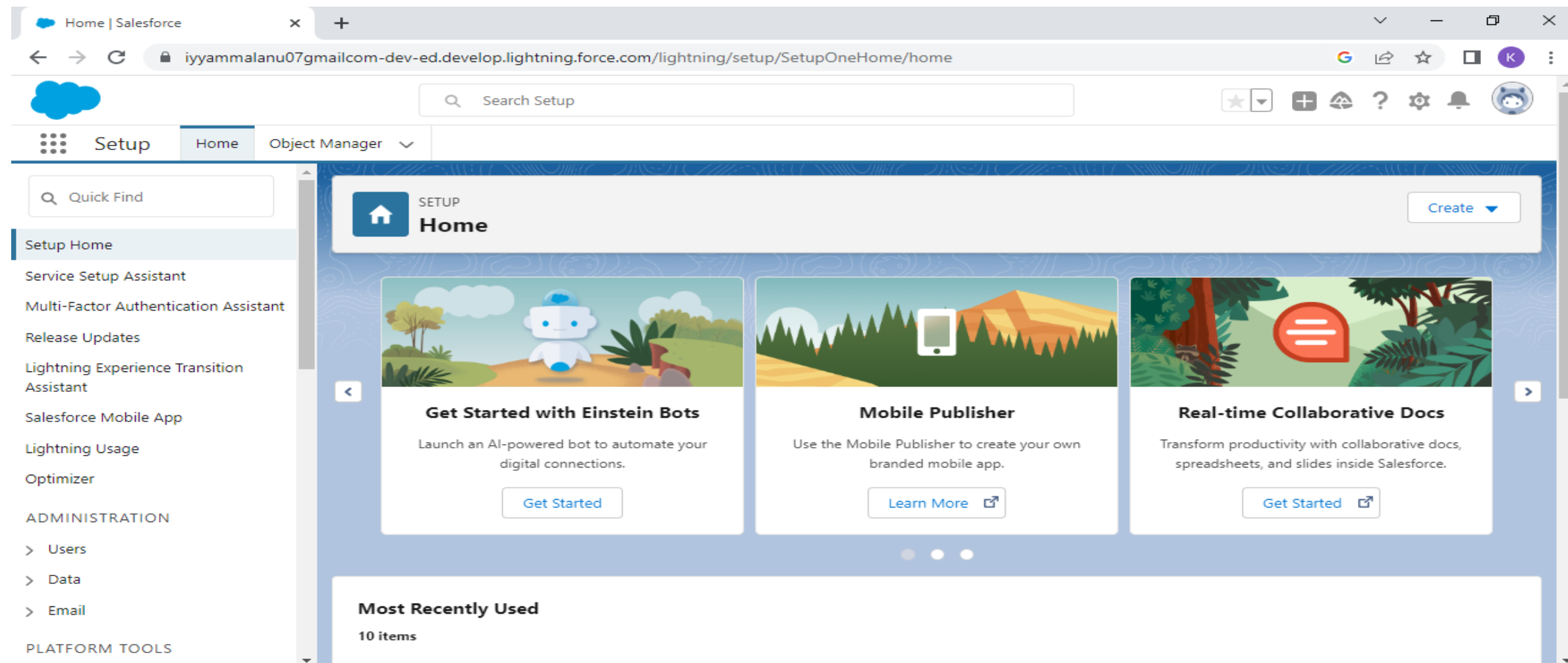
### 3.2. Activity& Screenshot

#### Creating Developer Account:



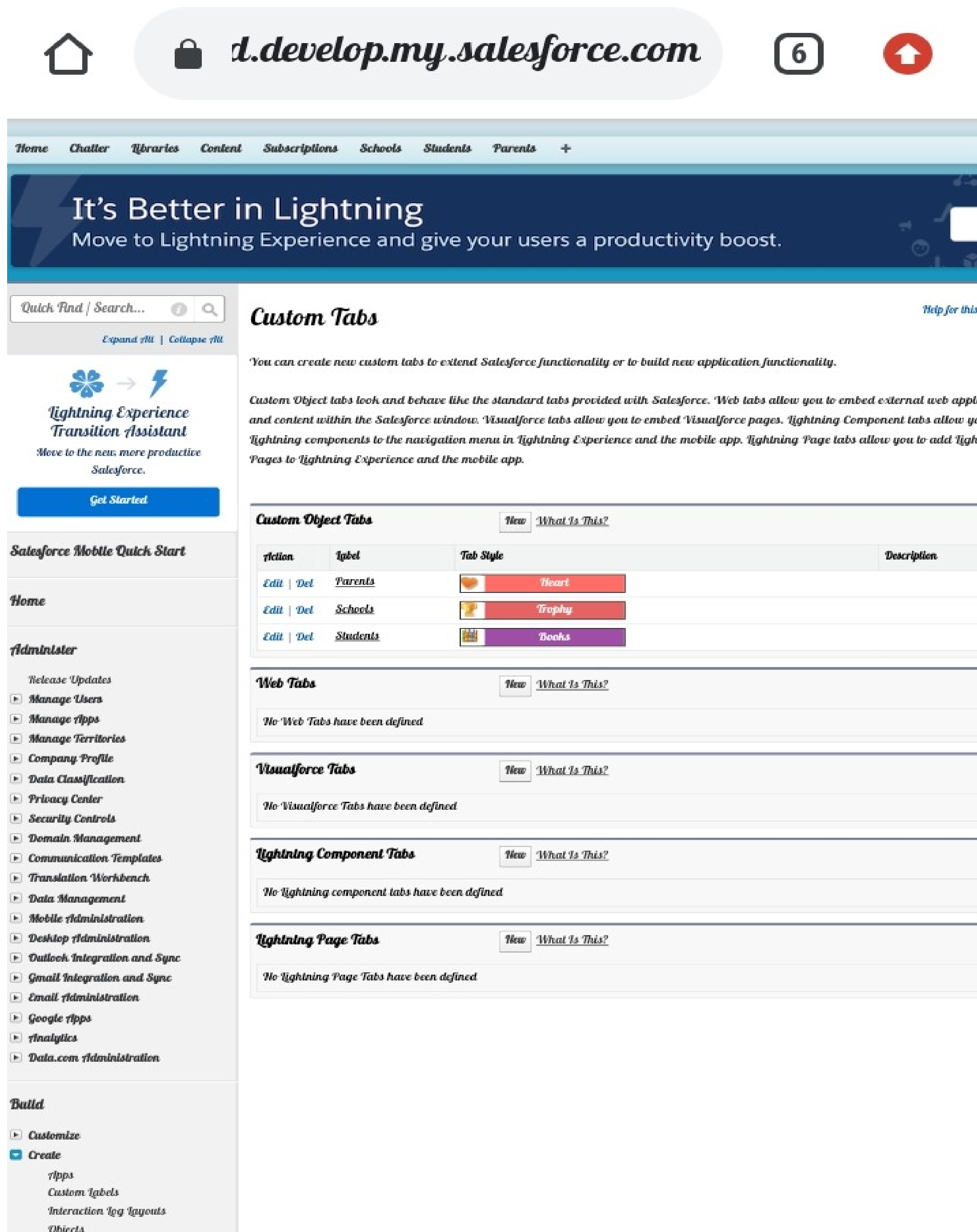
Using this <https://developer.salesforce.com/> link we signup the salesforce platform and finally we get the verification mail that shown in the above figure.

## Salesforce Login:



<https://login.salesforce.com/> we used this link to login the salesforce platform. This link asked our username and password only.

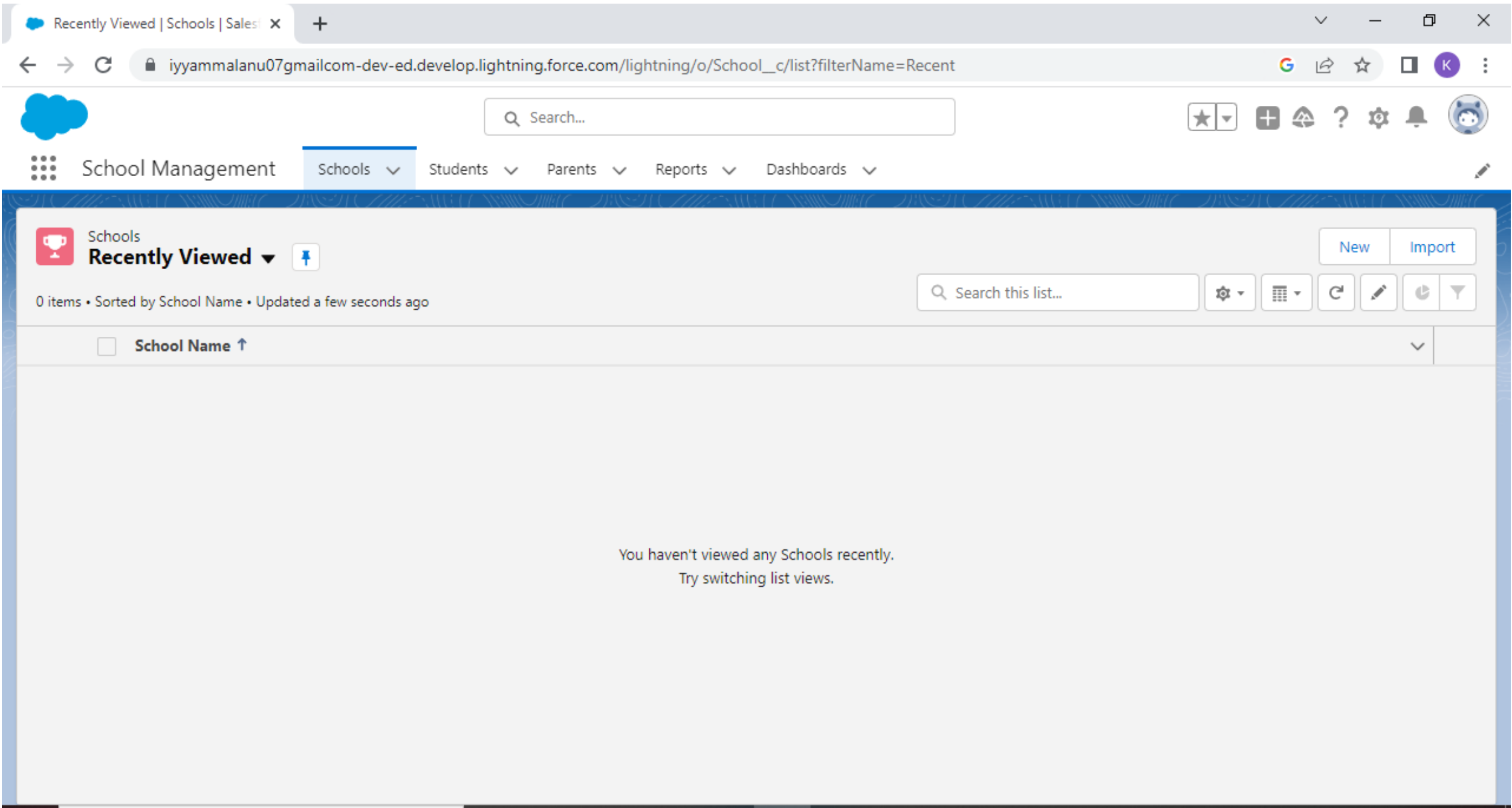
**Object:**



*For this school management project we created 3 objects. They are school object, parents object and students object.*

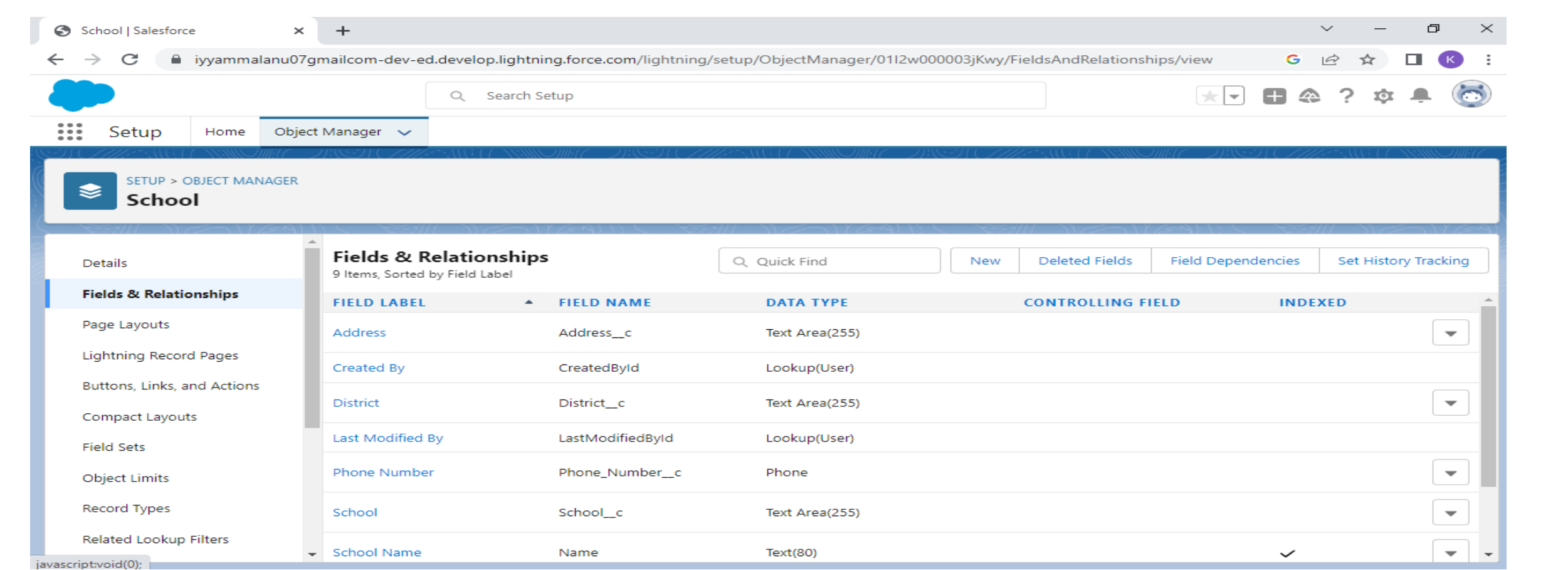


# Lightning App:



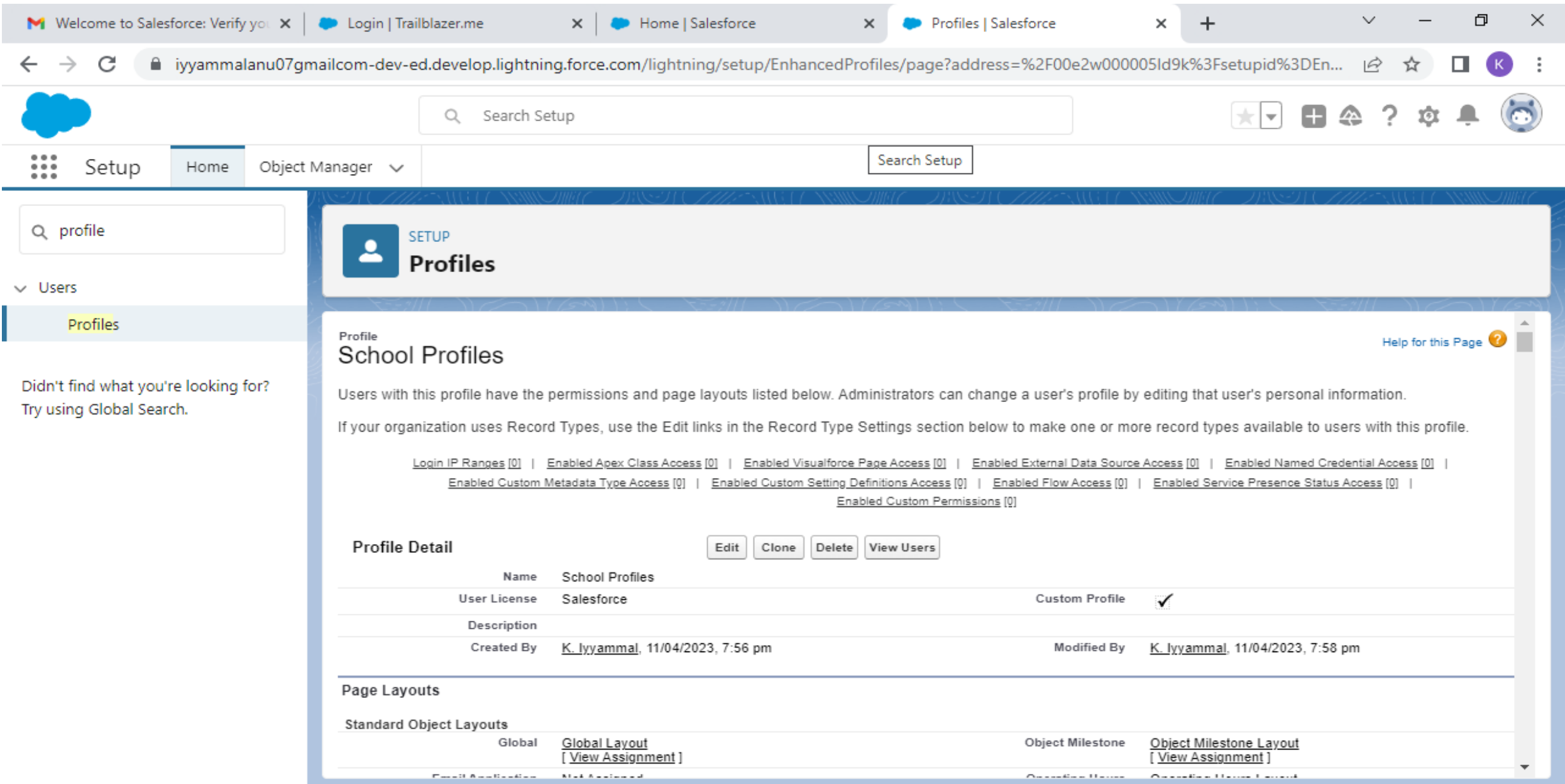
*Under this title we created the School Management App using Lightning App. The created new school management app will shown in the figure.*

# Fields and Relationship:



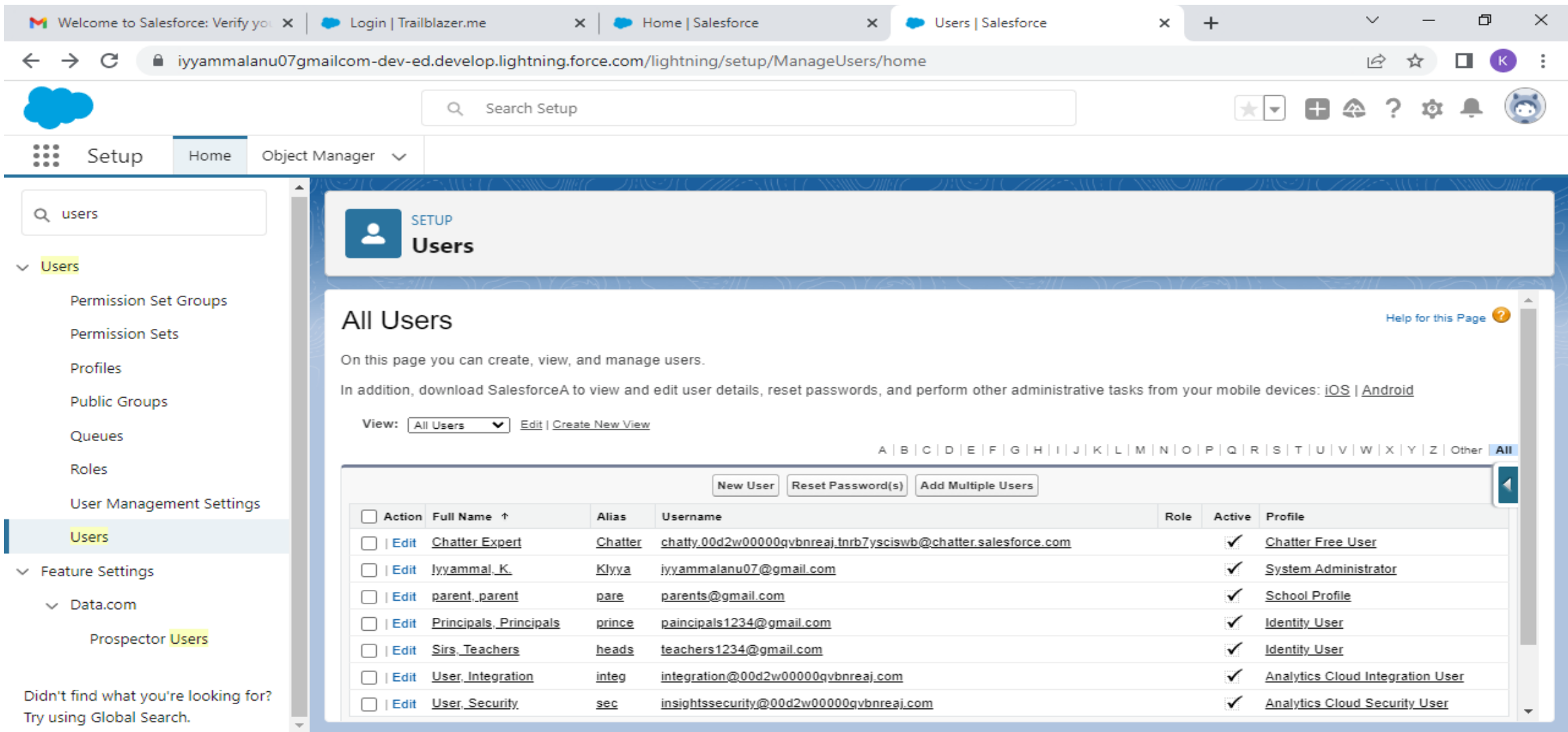
*Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.*

Profile:



We created the school profile . In custom Object Permissions we give view all access permissions and assign the parent profile.

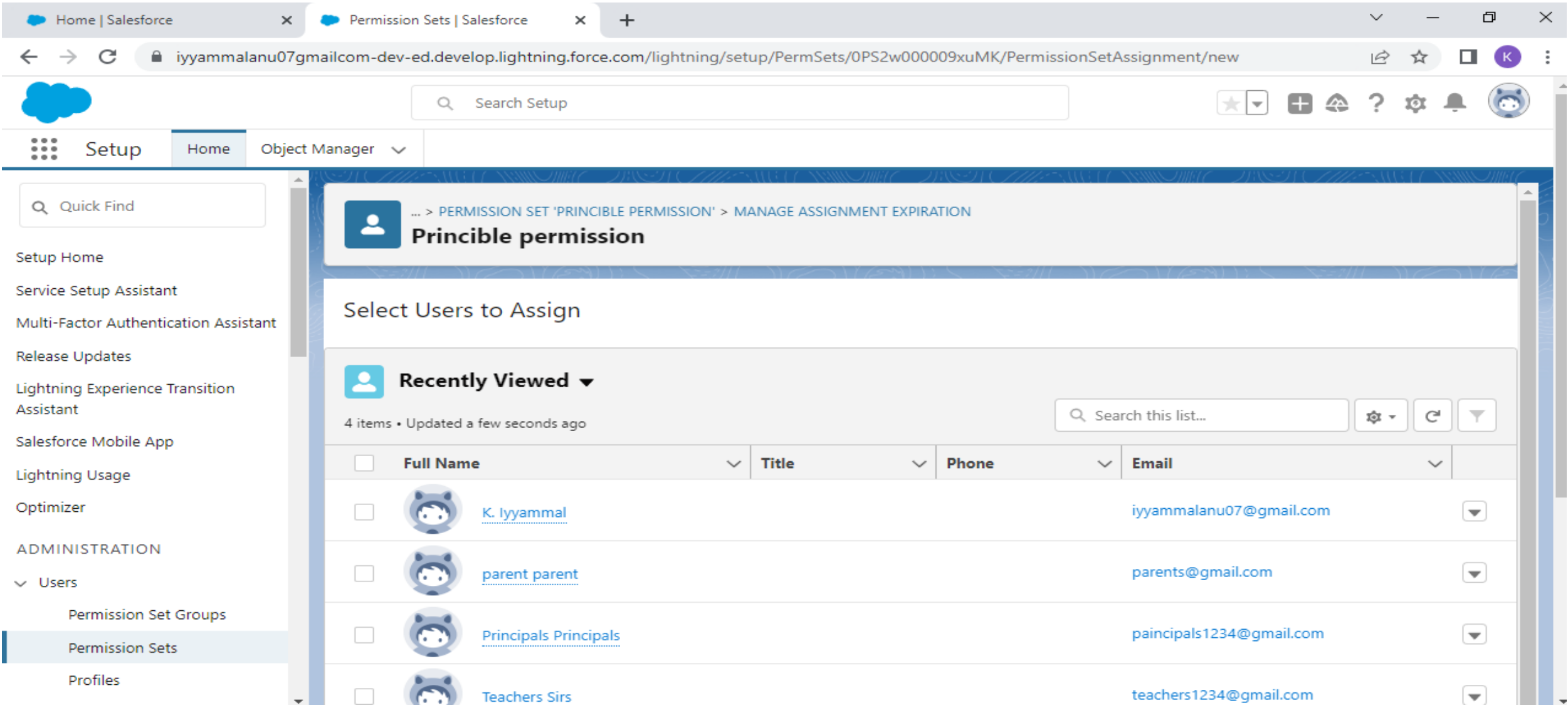
Users:



We created the three users like parents, teachers and principals.

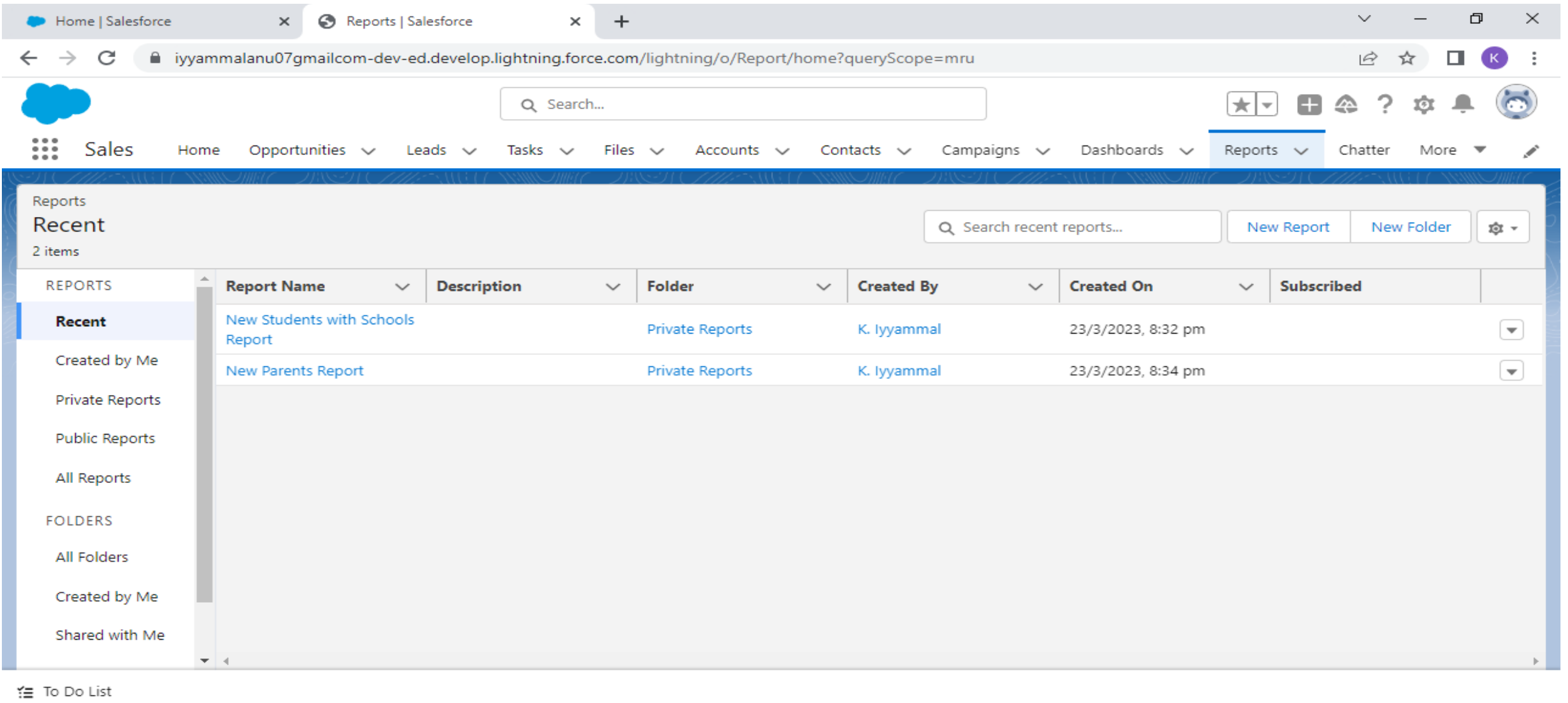


Permission sets:



*In this activity we create the two permission sets like teacher permission and principal permission.*

Reports:



*From the report tab we create report type as students with school and parent report.*

*They are checked by click the run button.*

## ***4. Trailhead Profile Public URL***

*Team Lead - <https://trailblazer.me/id/mmasha26>*

*Team Member 1 - <https://trailblazer.me/id/bharg594>*

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

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

## ***5. advantages & Disadvantage***

### ***advantages***

- *Improve Admissions and Enrolment details*
- *Improve Student Relationship with Institute*
- *Store documents received and reminder about pending Documents*
- *Maintain Course/University details with fee structure*
- *Maintains real-time MIS reports and Analytical data*
- *Improve customer service*
- *Improve decision making and productivity*

### ***Disadvantage***

- *A costly project.*
- *Loss of collected records or information.*
- *It eliminate the human element.*
- *Can be accessed by third party.*
- *Not fully customized.*
- *Employees training is must.*
- *Having lots of security concerns.*

## *6. applications*

- *Tracking customers*
- *Collecting data for marketing*
- *Improving interactions and communications*
- *Planning your operations.*
- *Streamlining internal sales processes*

## *7. conclusion*

*Salesforce is a great platform and, easy to use, powerful, quick as well as good community. The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and looking for a real-time project.*

## *8. future scope*

*Scope of education means range of view, outlook, field or opportunity of activity, operation and application of education. Education has a wider meaning and application.*