A CRM APPLICATION FOR SCHOOLS AND COLLEGES

Project Report Template

1. INTRODUCTION

This project helps you to maintain and manage the school related problems which further can be modified based on requirements.

1.1 OVERVIEW

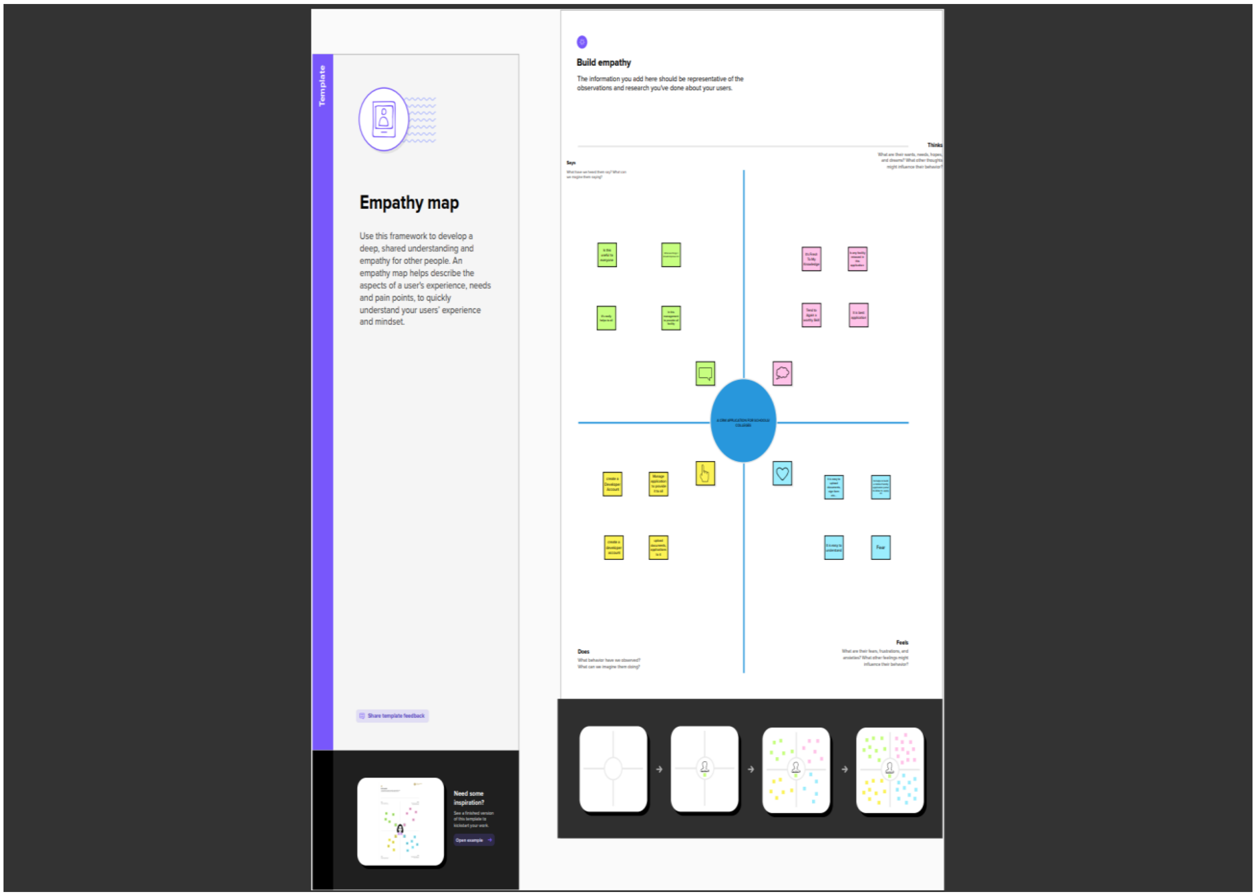
- The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.
- Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal if to improve customer service relationships and assist in customer retention and drive sales growth.

1.2 PURPOSE

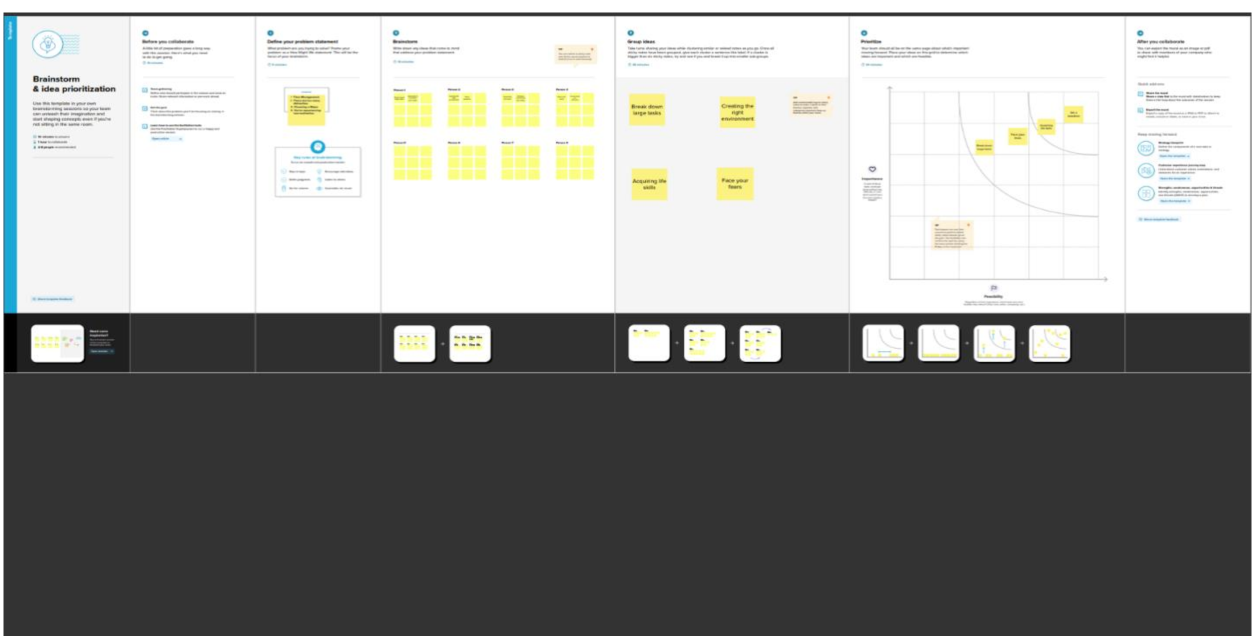
- Customer relationship management (CRM) is a technology for managing all your company’s relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.
- The fundamental purpose of a CRM system is to improve the customer experience. Executing on this objective is the most sure-fire way to see positive results across your business. When you make improved customer satisfaction the main goal for your CRM, all other objectives work to support this goal.
- A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

2. PROBLEMS DEFINITION AND DESIGN THINKING

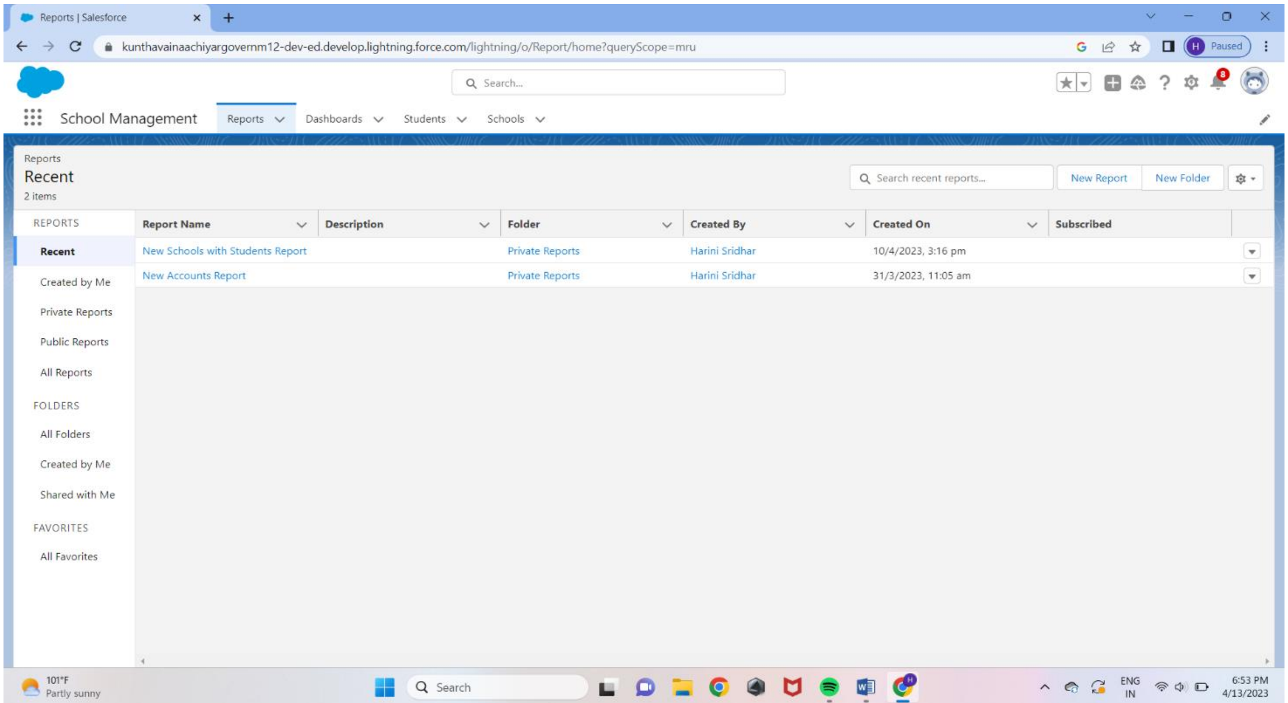
2.1. EMPATHY MAPS



2.2 IDEATION AND BRAINSTORMING MAPS



3. RESULT



4. ADVANTAGES AND DISADVANTAGES

ADVANTAGES

- Manage student's inquiry and courses enquired.
- Manage student's enrolment information.
- Centralize student's information: this keeps all the data of students, staff, and admission records at one software.
- Maximize student's admission efficiency.
- Run emails, SMS marketing, and information campaigns to attract the students.
- Real time reporting and analytical reports
- Schedule of classes and information on the educational process, by student and teachers with the ability to upload homework and receive feedback
- Ability to create tasks, business processes and schedule work.
- Planning and multitasking.
- Easy implementation.

- History of work with each student.
- Improving the organization management process.

DISADVANTAGES

- Manage the leads as well as the customer's relation: this not only manages the relation of clients even the lead ends. It lets you manage your lead, student collaboration, and recruitments on the unified dashboard.
- Better interaction: It gives you a central view of every interaction, engagement with your students, staff, and trustees.
- Improve the efficiency of services
- Increase the satisfaction of staff.
- Time-saving: As all the activities are done with the support of CRM. Hence, it is a time-saving way to run a business. CRM solves the problems of staff/students, manage the leads, and build the relation with customers.

5. APPLICATIONS

- Student information management: including demographic information, enrollment history, academic records, and contact details.
- Enrollment tracking: Manage the enrollment process from lead generation, application, acceptance, and enrollment.
- Academic progress tracking: Monitor student progress, including grades, attendance, and behavioral records.
- Communication tools: Stay in touch with students, parents, staff, and alumni using email, SMS, and other communication channels.
- Event management: Plan open days, reunions, and fundraising events.
- Fundraising management: Manage donations and other fundraising activities.
- Reporting tools: Use a dashboard to gain valuable insights into operations and make data-driven decisions that support student retention.

- Integrations with other educational systems: Connect with other software systems such as Learning Management Systems (LMS), Student Information Systems (SIS), and Finance and Accounting Systems.
- Using CRM in education industry provides organizations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student's engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.
- A CRM system can help educational organizations effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalizing communication and providing automated follow-up, educational organization can build better relationships with students and leads, and keep them engaged over time.

6. CONCLUSION

- ➢ The customer relationship management has simplified the handling of customer's in many industries.
- ➢ A CRM is a customer-centric system that can help education professionals nurture relationships with prospects and enrolls, produce data-driven insights to illustrate progress towards goals, and streamline their admissions initiatives to save time and effort.
- ➢ Therefore, after few years CRM will be the important and better process for customer management.

7. FUTURE SCOPE

- With the increase in complexities, educational institutes have also changed their approach to operate. These organizations embraced CRM for educational institutions to enhance student experiences, streamline operations, track and maintain information to develop a deeper understanding of their processes, and extend their outreach.

- A CRM for education industry to improve the way organizations function:

- The admission process can be tricky. It needs wide-reaching strategies to pull in the interest of the target demographics of students. On top of this, dealing with a constant influx of applications from different regions and using various technology channels is too overwhelming to manage manually. You need the correct software application to handle this effectively.
- CRM for educational institutions tracks and automates the tasks involved in the admission process, such as gathering and storing applicants' data, sending messages to inform about their enrollment status, etc. The system also lets you manage the course and program each student is admitted to along with their batch and roll number, academic documents, and other related details on one single platform.
- Track Student Life-Cycles Within the Institution
- The student lifecycle begins with the admission and goes all the way to graduation.
- CRM software enables you to establish and uphold personal well-being with the students and helps them achieve academic success. It has built-in alerts that enable you to notify students about upcoming exam schedules, fee payment deadlines, and other information updates. Leveraging data stored in the system, you can also develop personalized messages to enrich the student interactions. In addition, the centralized platform improves information sharing outreach across all departments.

- Build Relationships with Prospects Using CRM for Schools and colleges.
  I. The process of building connections with prospective students may feel more like an art than a precise science, but with CRM, it's possible to shift that balance.

- Measure Your School's Progress with CRM Reporting

  I. One of the great strengths of the CRM model is in how it collects and organizes large quantities of useful data in a manner that is easily accessible. As a result, the CRM reports you can generate will make a valuable addition to your school's recruitment measurement.

1. **Speed to Lead**– A measure of how soon your staff members are following up with new leads once they enter the system.

2. **Meetings Outcome**– A summary of any meetings your staff have held with leads.
3. **Leads with no Scheduled Follow-up**– A quick view of any leads for whom no follow-up activities (calls, meetings, emails, etc.) have been scheduled, sorted by lead owner.
4. **Leads by Stage**– All leads segmented by admissions stage showing the percentage and number of each.
5. **Leads by Program**– All leads segmented by program of interest (if known) showing the percentage and number of each.
6. **Leads by Source**– All leads attributed to their original source (e.g. organic website traffic, paid advertising campaigns, online sources etc.) showing the percentage and number of each.
7. **Lead Status**– Leads segmented by status (Hot, Warm, Cold, Not Interested, Not Applicable).
8. **Lead Conversion**– Details how many of your leads have been successfully contacted, held a meeting, made an application, or enrolled with your school over a given period of time.
9. **Calls Outcome-**All calls made by specific outcome (Connected, Busy, No Answer, etc.).
10. **Admissions Activities Summary**– A summary of all follow-up actions taken by your admissions staff (calls held, meetings, emails sent, etc.).

8. Appendix

A. Source code

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

This Project helps you to maintain and manage the school related problems which further can be modified based on the requirements.

PROJECT DESCRIPTION

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. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

What you'll learn

1. Real Time Salesforce Project

2. Object & Relationship in Salesforce

3. Profile

4. Users

5. Reports

6. Permission sets

7. Reports

CREATION SALESFORCE ORG:

MILESTONE-1:

INTRODUCTION

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don’t know where you should start on your learning journey? If you’ve answered yes to any of these questions, then you’re in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features that will help you sell smarter and faster. As you work toward your badge for this module, we’ll take you through these features and answer the question, “What is Salesforce, anyway?”

WHAT IS SALESFORCE?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

https://youtu.be/r9EX3lGde5k

ACTIVITY: CREATING DEVELOPER ACCOUNT

Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details:

a. First name & Last name

a. Email

b. Role: Developer

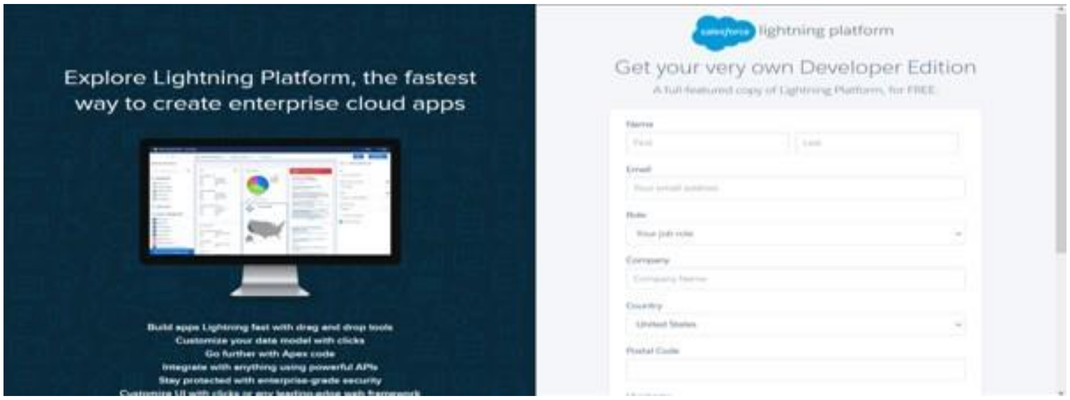
c. Company: College Name

d. County: India

e. Postal Code : pin code

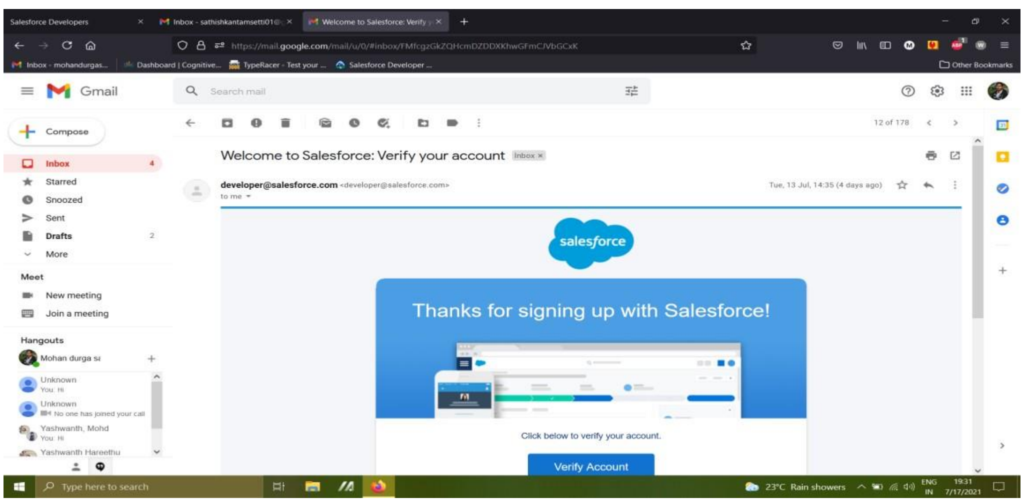
f. Username: should be a combination of your name and company This need not be an actual email id, you can give anything in the format: username@organization.com

Click on sign up after filling these.



ACCOUNT ACTIVATION

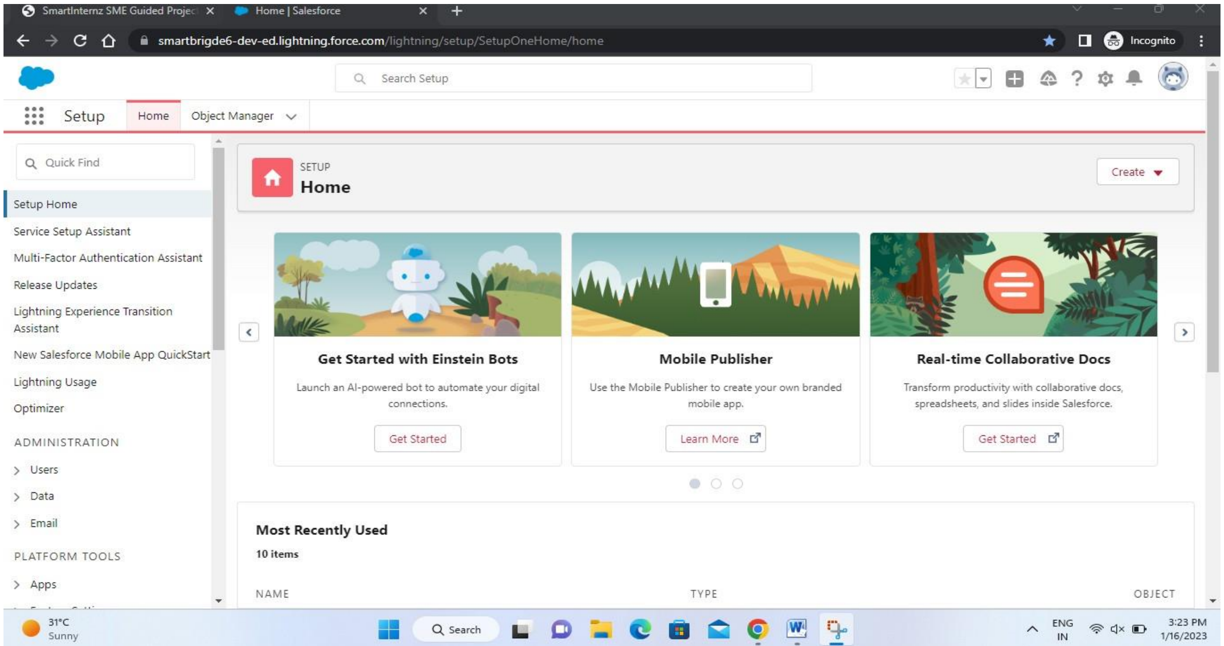
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



LOGIN TO YOUR SALESFORCE ACCOUNT

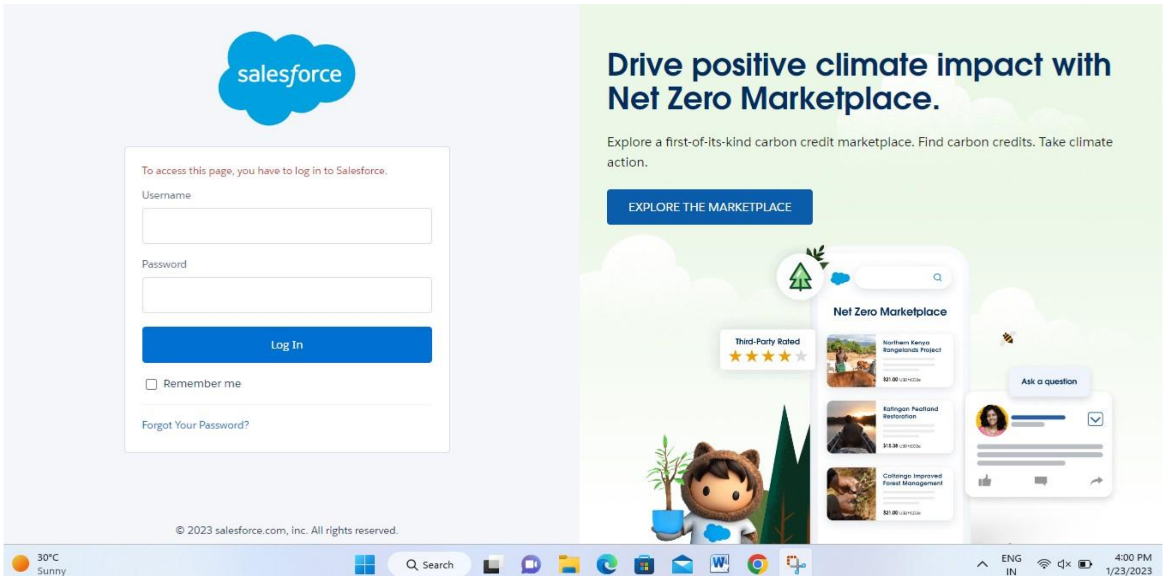
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.

3. After login this is the home page which
   you will see.



Salesforce Login

htttps://login.salesforce.com

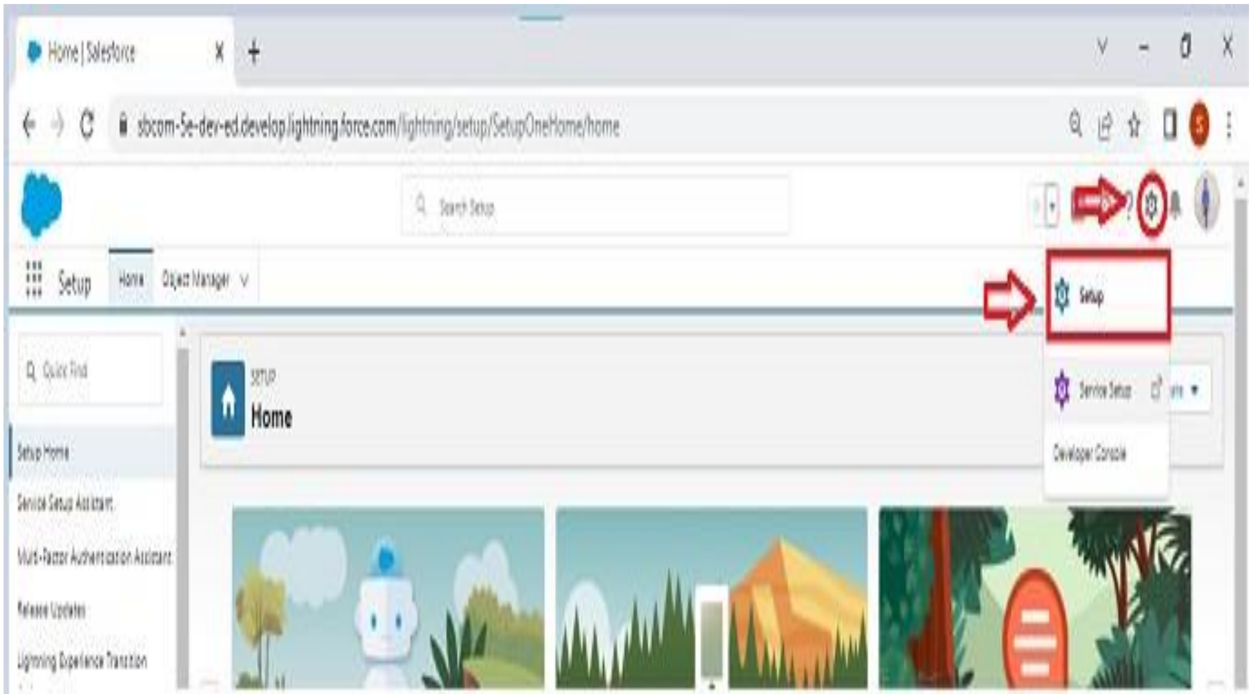


MILESTONE-2:OBJECT

Salesforce objects are **database tables that permit you to store data that is specific to an organization**. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

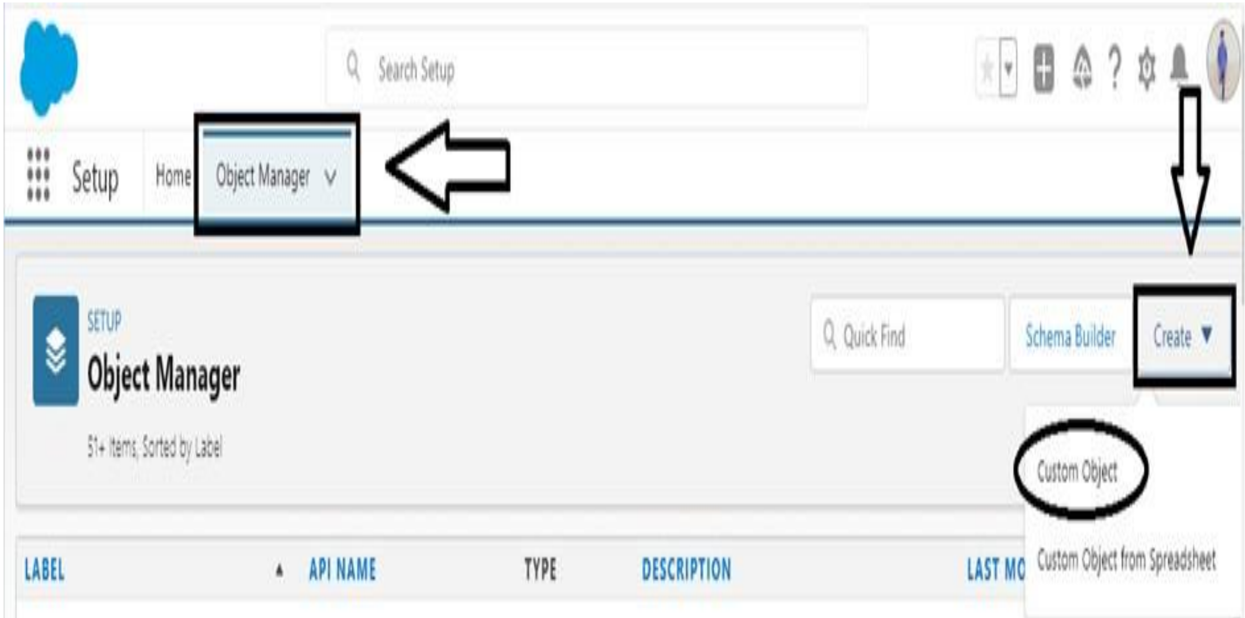
ACTIVITY-1: CREATION OF SCHOOL OBJECT

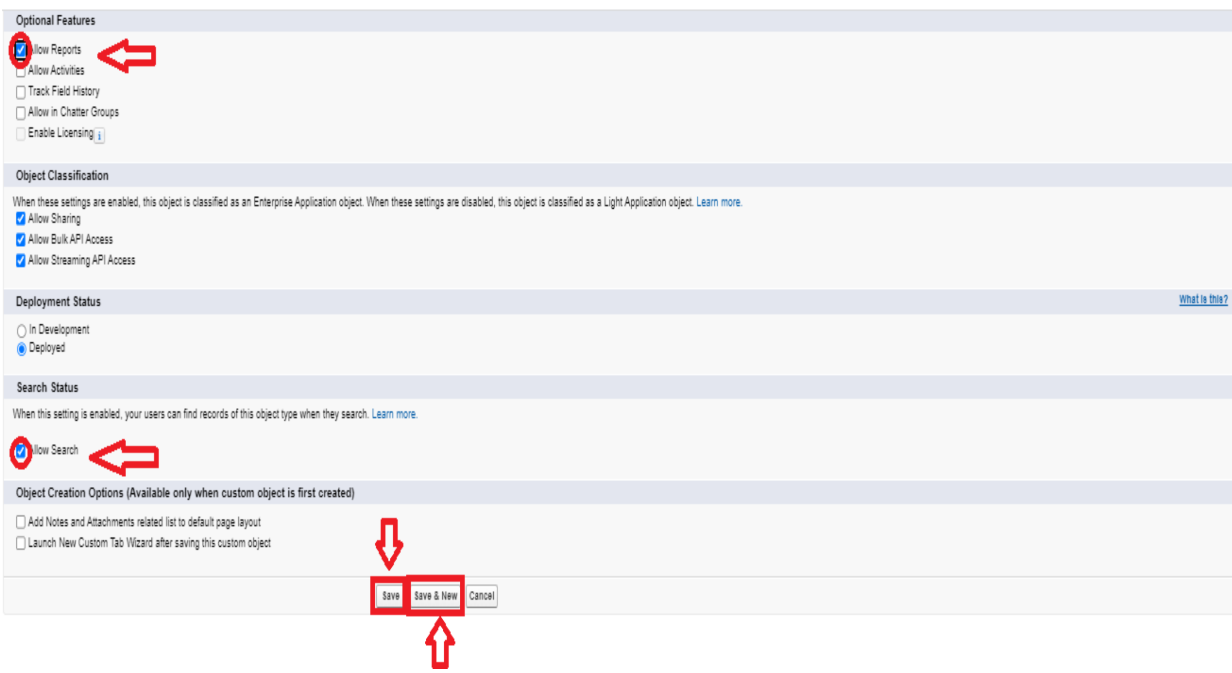
CREATION OF OBJECTS FOR SCHOOL MANAGEMENT:

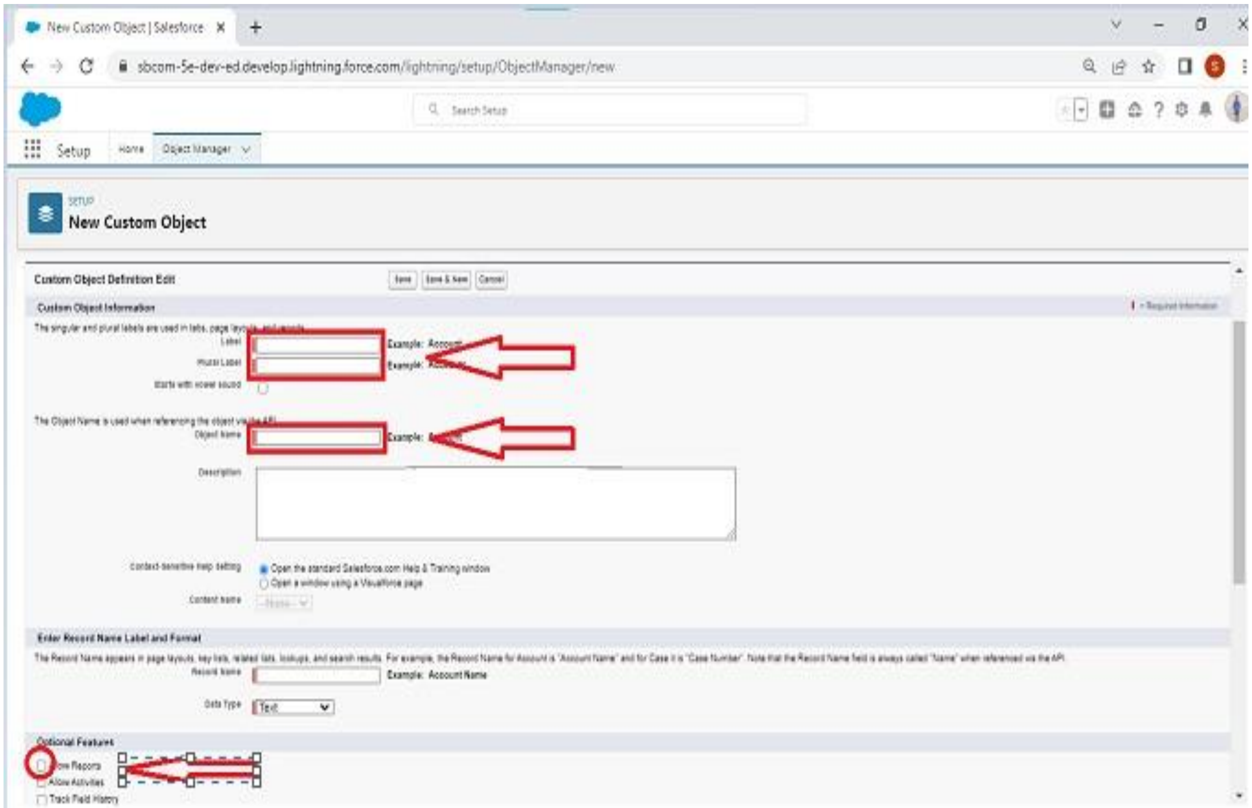


For this school management we need to create 3 objects i.e school, parents and students.The below steps will assist you in creating those objects. Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.
   - On the Custom Object Definition page, create the object as follows:
   - Label: School
   - Plural Label: Schools
   - Record Name: School Name
   - Check the Allow Reports checkbox
   - Check the Allow Search checkbox
   - Click Save.

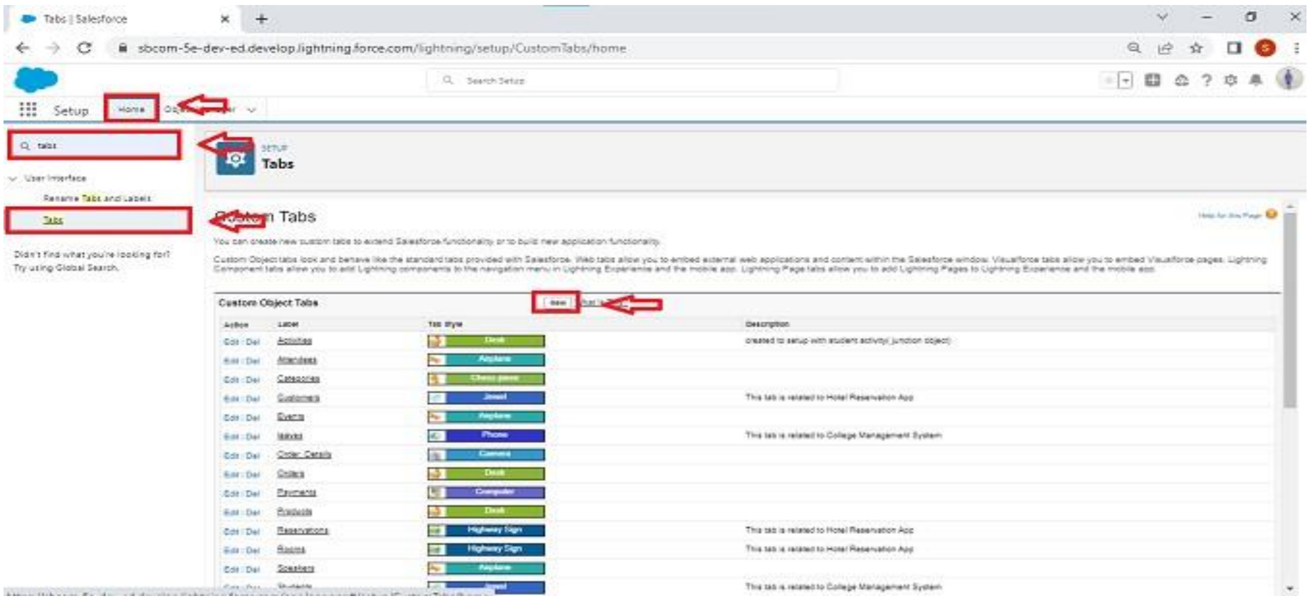

Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
Custom Object
Custom Object from Spreadsheet
LABEL
API NAME
TYPE
DESCRIPTION
LAST MO

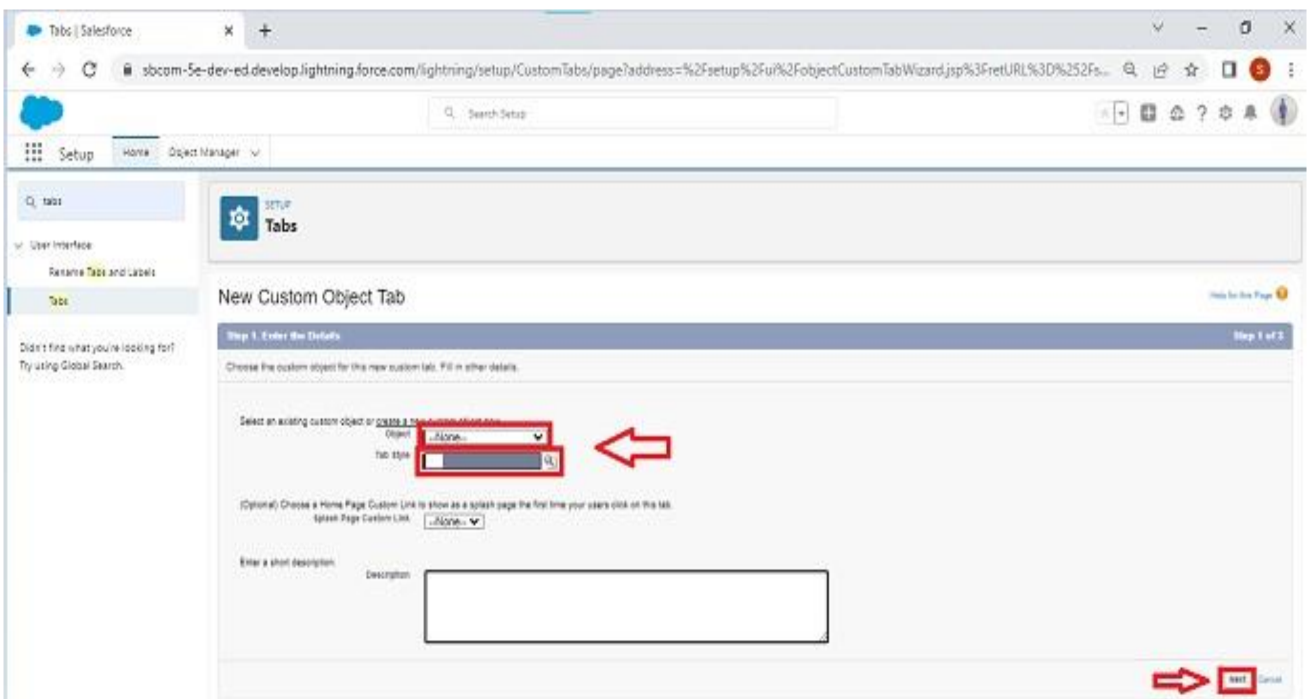

Optional Features
llow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
llow Search
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
Save
Save & New
Cancel



Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.Under Custom Object Tabs, click New.

1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.





In the same way create other objects such as students and parents.

ACTIVITY 2: CREATE STUDENT OBJECT

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.

On the Custom Object Definition page, create the object as follows:

- Label: Students
- Plural Label: Students
- Record Name: Student Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.Under Custom Object Tabs, click New.

1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

ACTIVITY 3: CREATE PARENT OBJECT

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.

   On the Custom Object Definition page, create the object as follows:

   - Label: Parent
   - Plural Label: Parents
   - Record Name: Parent Name
   - Check the Allow Reports checkbox
   - Check the Allow Search checkbox
   - Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.Under Custom Object Tabs, click New.

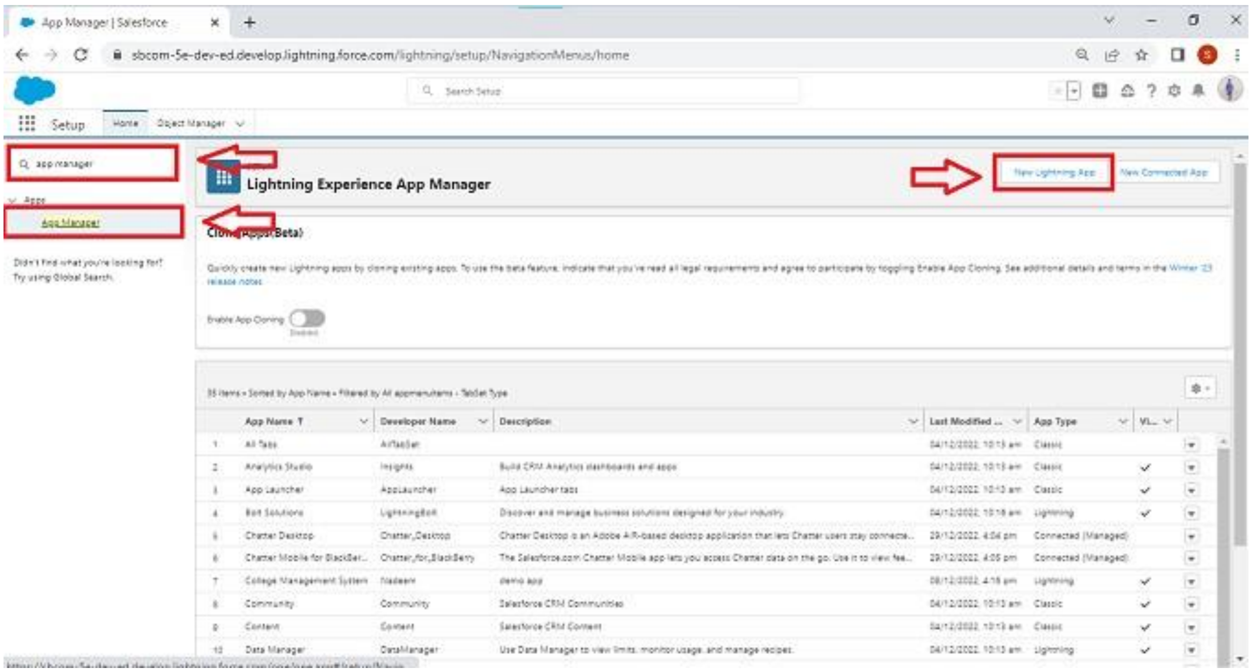
1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

MILESTONE-3: LIGHTNING APP

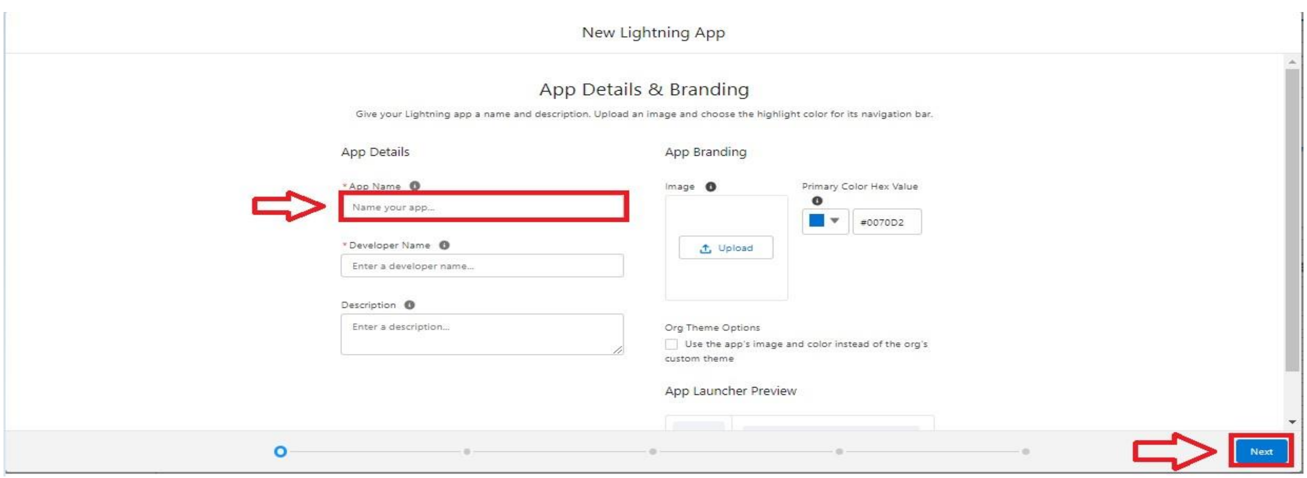
Apps in Salesforce are a group of tabs that help the application function by working together as aunit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

ACTIVITY:

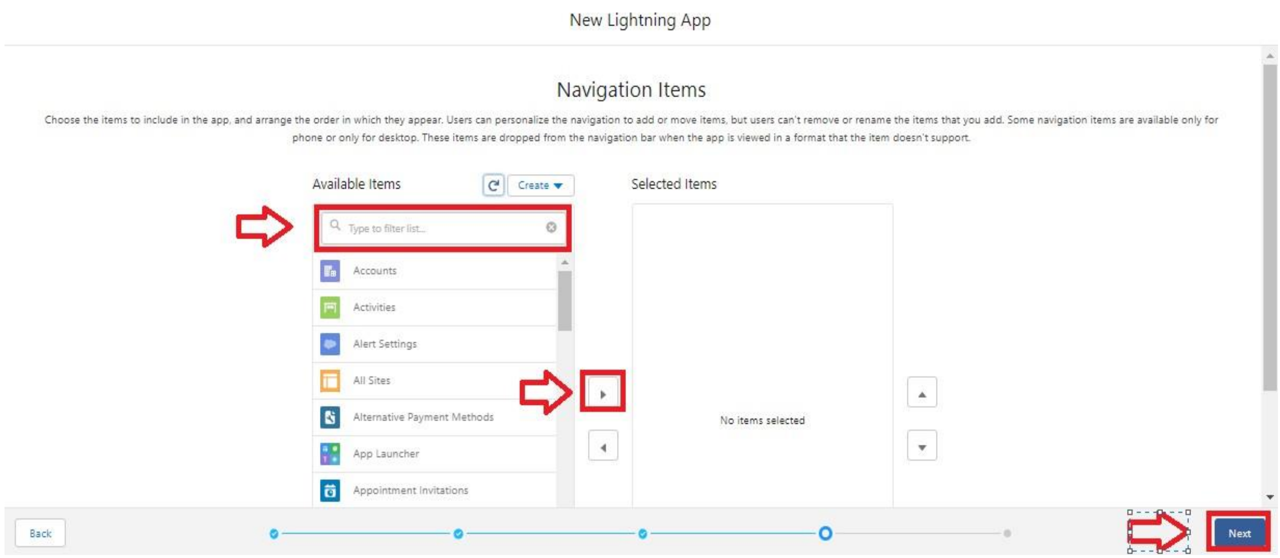
CREATE THE SCHOOL MANAGEMENT APP



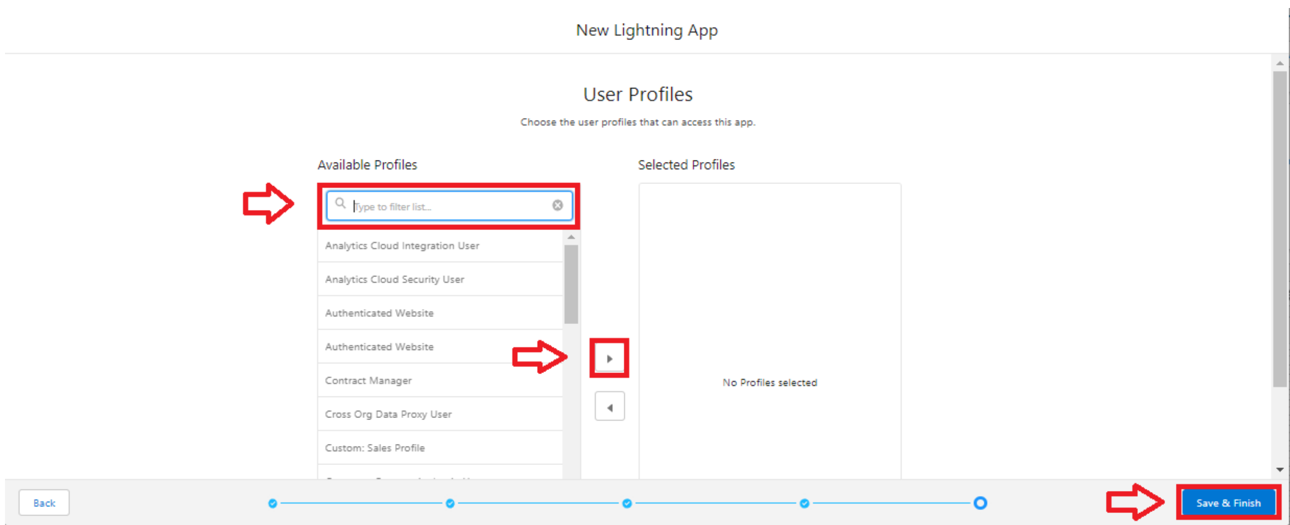
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter School Management as the App Name, then click next.



- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Schools,Students,Parents, Reports, and Dashboards andmove them to Selected Items. Click Next.



From Available Profiles, select System Administrator and move it to Selected Profiles.Click Save & Finish.



- To verify your changes, click the App Launcher, type School Management and select theSchool Management app.

Note:

1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

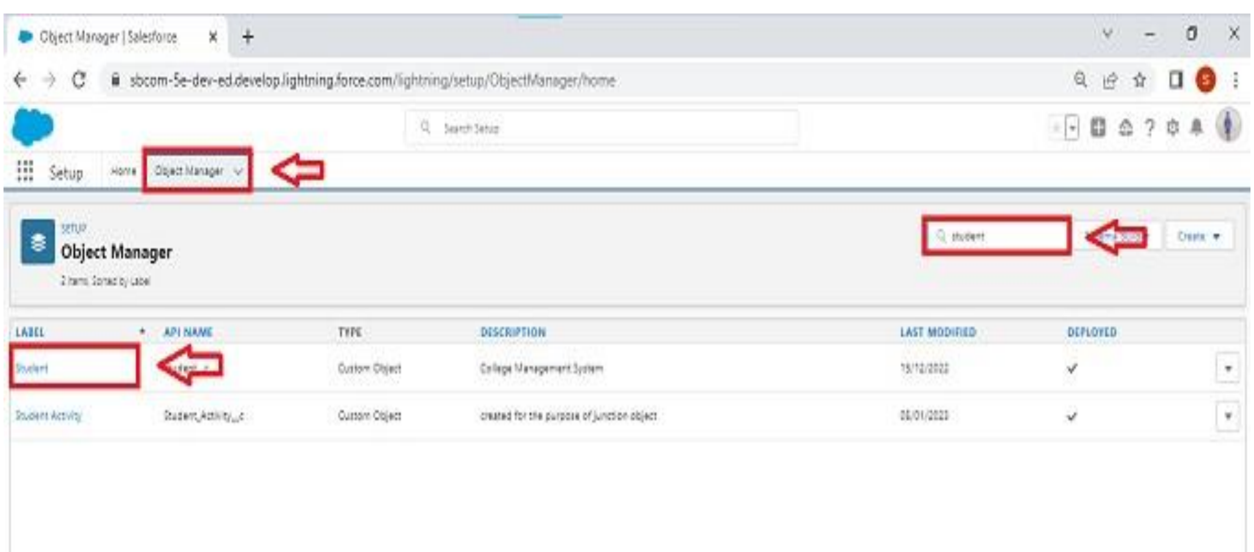
MILESTONE -4:FIELDS AND RELATIONSHIP

An object relationship in Salesforce is **a two-way association between two objects**. Relationships are created by creating custom relationship fields on an object. This is done so thatwhen users view records, they can also see and access related data.

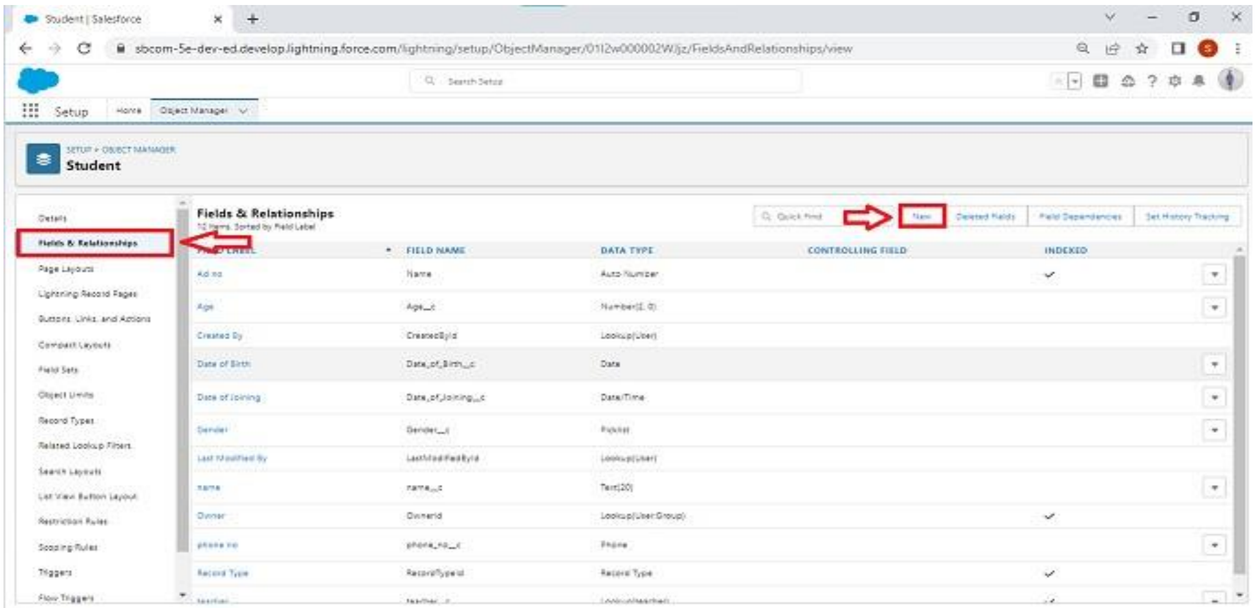
ACTIVITY-1:

CREATION OF FIELDS FOR THE SCHOOL OBJECTS:

1. click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.



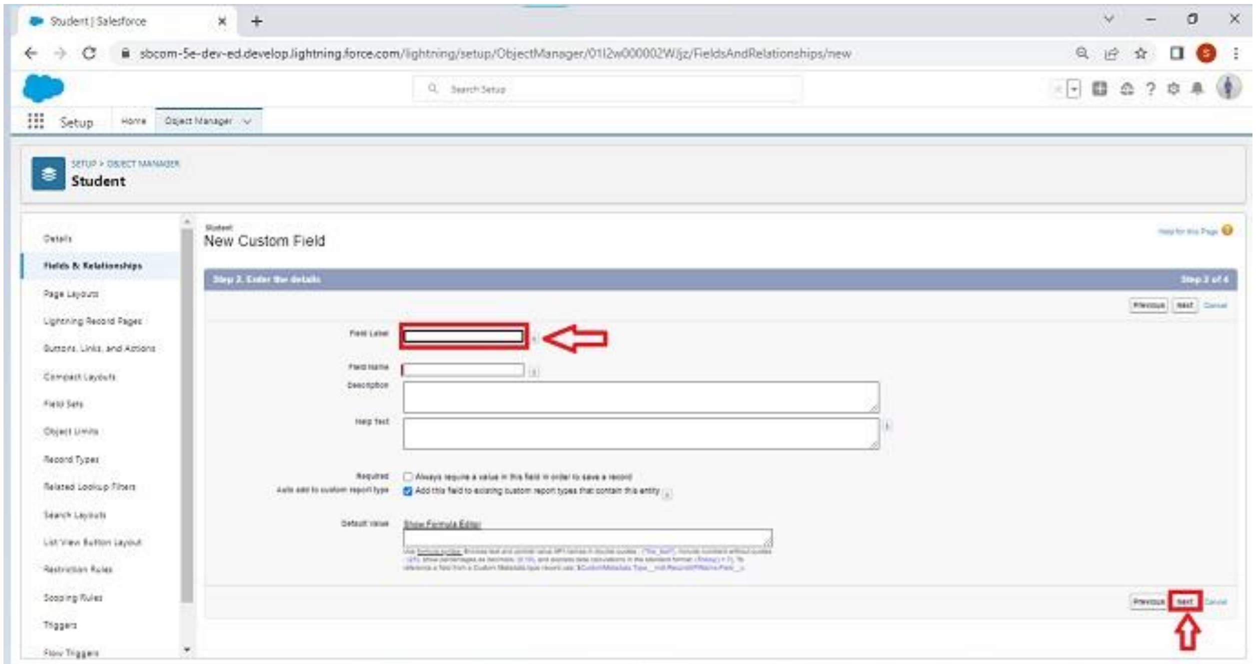
- Select School.
- Select Fields & Relationships from the left navigation, and click New.



Now we're ready to make a custom field. Let's do this!

- Select the Text Area as the Data Type, then click Next.
- For Field Label, enter Address.
- Click Next, Next, then Save & New.

Follow steps 1 through 3 and create two more text areas with District,State and Schoolwebsites as the field labels.



Now let's create the other fields and we must choose the data types of the fields carefully .Let'shave a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type.

Lets see this,

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

Lets create Roll-up summary fields to calculate the number of students.

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.

3. Select the Roll-up summary field as data type
4. Enter the field label as Number of students
5. Click Next.
6. Then select the master object summarized as students and then select count as roll-up andthen click Next,Next and save.

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type.
4. Enter the field label as Highest Marks
5. Click Next
6. Then select the master object summarized as students and then select Max as roll-up andthen select Marks as field to aggregate.click Next,Next and save.

ACTIVITY-2:

CREATION OF FIELDS FOR THE STUDENT OBJECTS:

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

Let's create a master-detail relationship with school object

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.

4. For Field Label, enter School.
5. Click Next, Next, Next and Save.

Lets create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
6. Pass
7. Fail
8. Click Next, Next, then Save &New

Lets create a Number field:

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

ACTIVITY-3:

CREATION OF FIELDS FOR THE PARENT OBJECTS:

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.
4. Select the Phone as the Data Type, then click Next.
5. For Field Label, enter Parent Number.
6. Click Next, Next, then Save & New.

MILESTONE-5: PROFILE

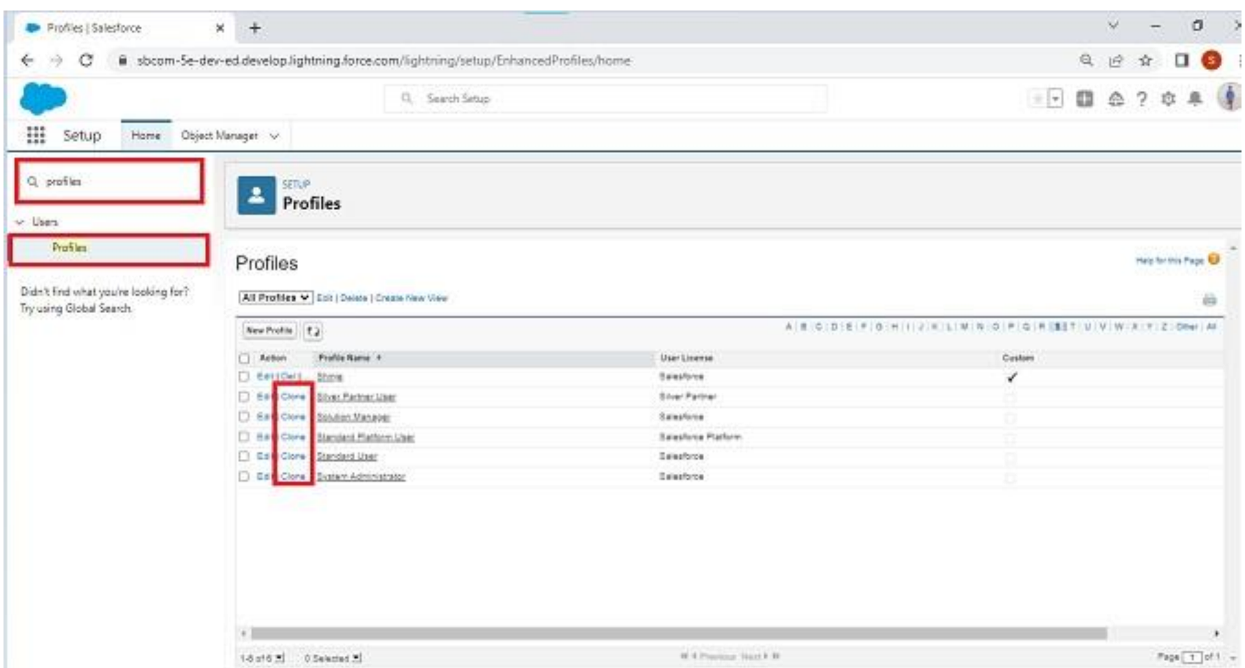
A profile is **a group/collection of settings and permissions that define what a user can do insalesforce**. A profile controls “Object permissions, Field permissions, User permissions, Tab
settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types,Login hours & Login IP ranges

ACTIVITY:

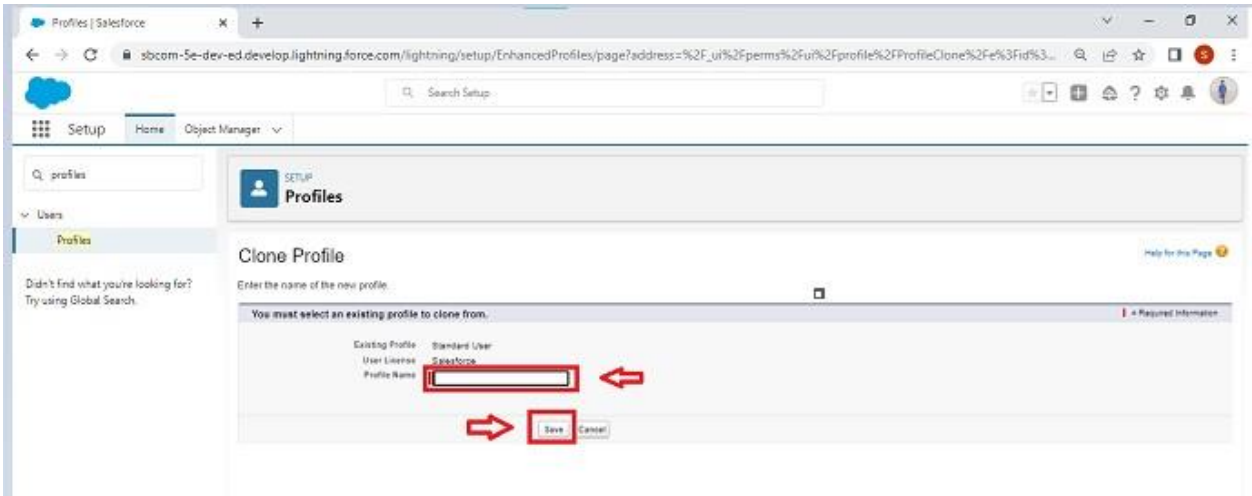
CREATION ON PROFILE:

From Setup enter Profiles in the Quick Find box, and select Profiles.

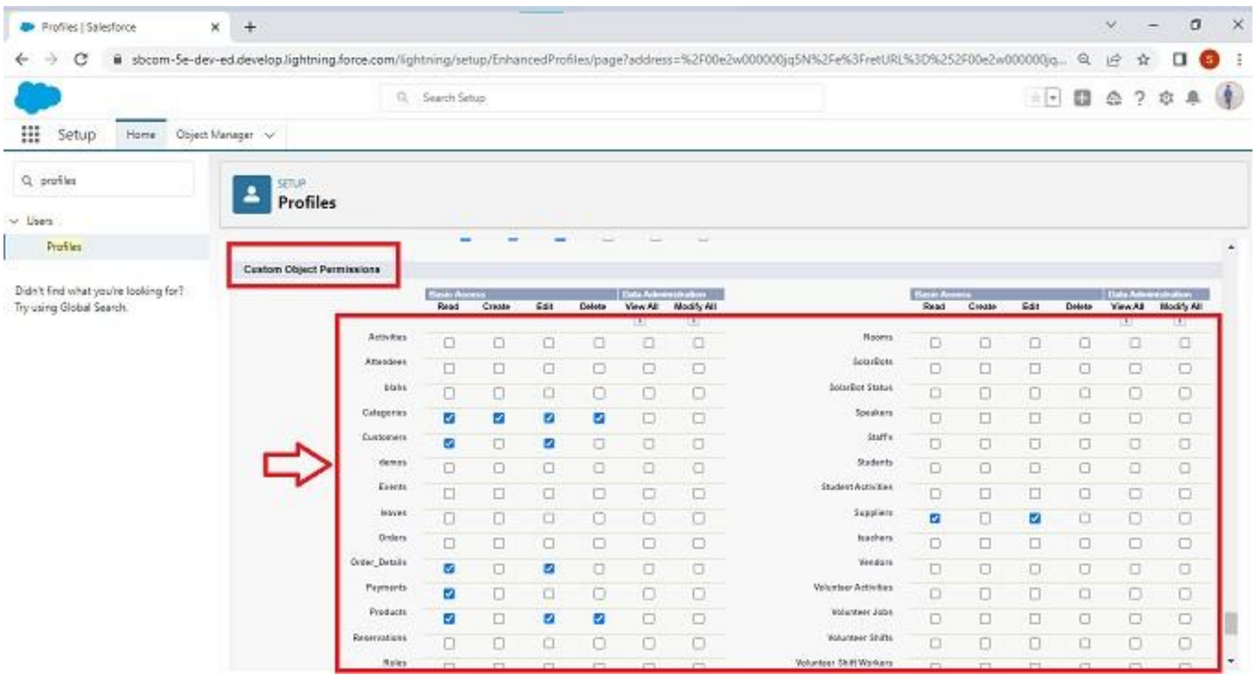
1. From the list of profiles, find Standard User.
2. Click Clone.



3. For Profile Name, enter School profile.



4. Click **Save**.
5. While still on the School profile page, then click **Edit**.
6. Scroll down to Custom Object Permissions and Give view all access permissions andassign to the parent profile



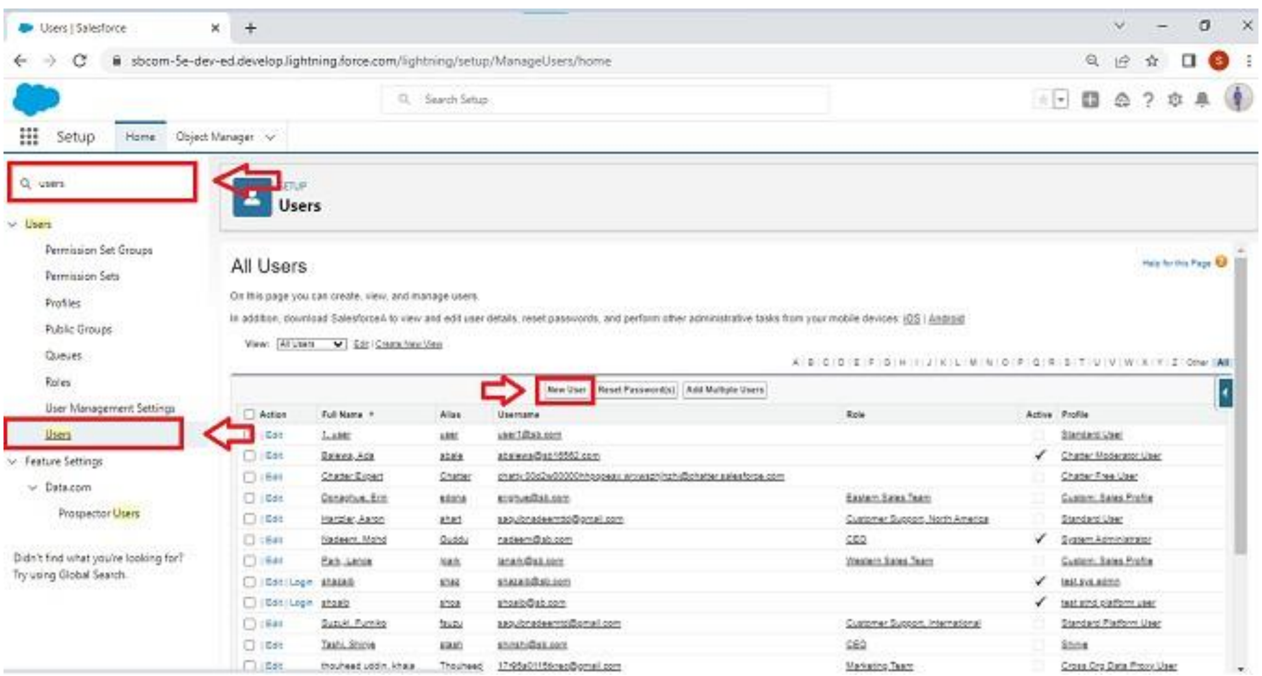
MILESTONE-6: USERS

A user is **anyone who logs in to Salesforce**. Users are employees at your company, such as salesreps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

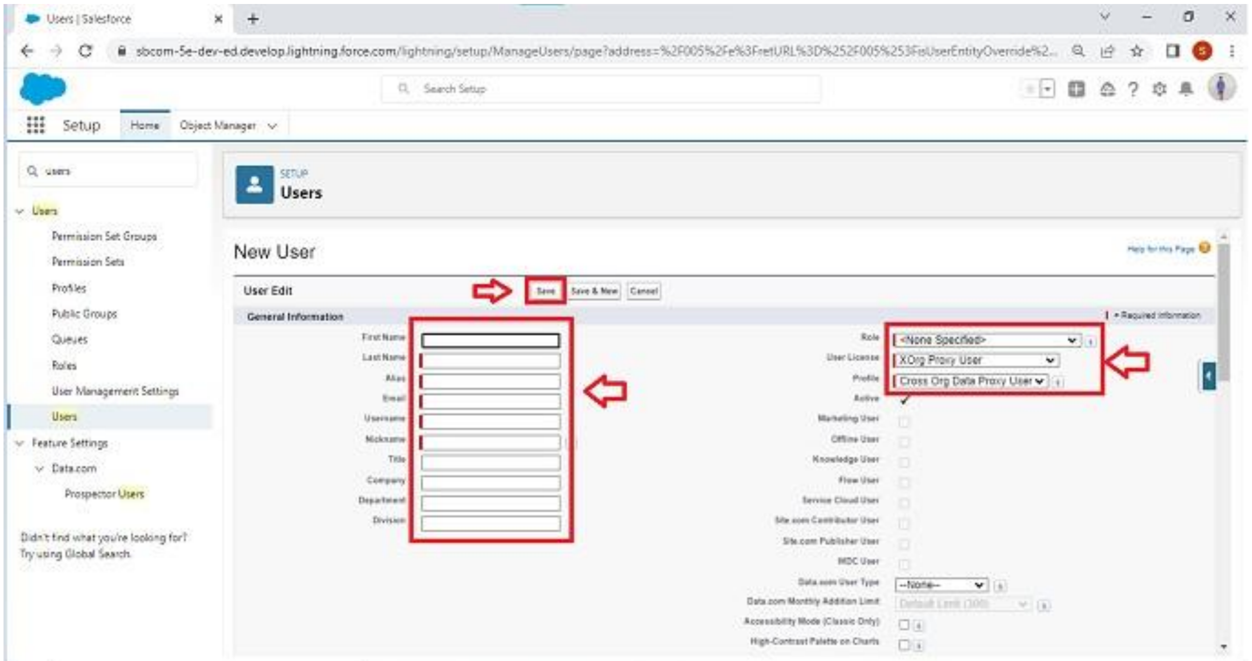
ACTIVITY:

CREATING A USERS:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.



3. Enter the user’s name Parents and (Your) email address and a unique username in theform of an email address. By default, the username is the same as the email address.
4. Select a User License As salesforce.
5. Select a profile as a School profile.
6. Check Generate new password and notify the user immediately to have the user’s loginname and a temporary password emailed to your email.



7. Similarly follow the above steps and create 3 users as Teachers and principals.

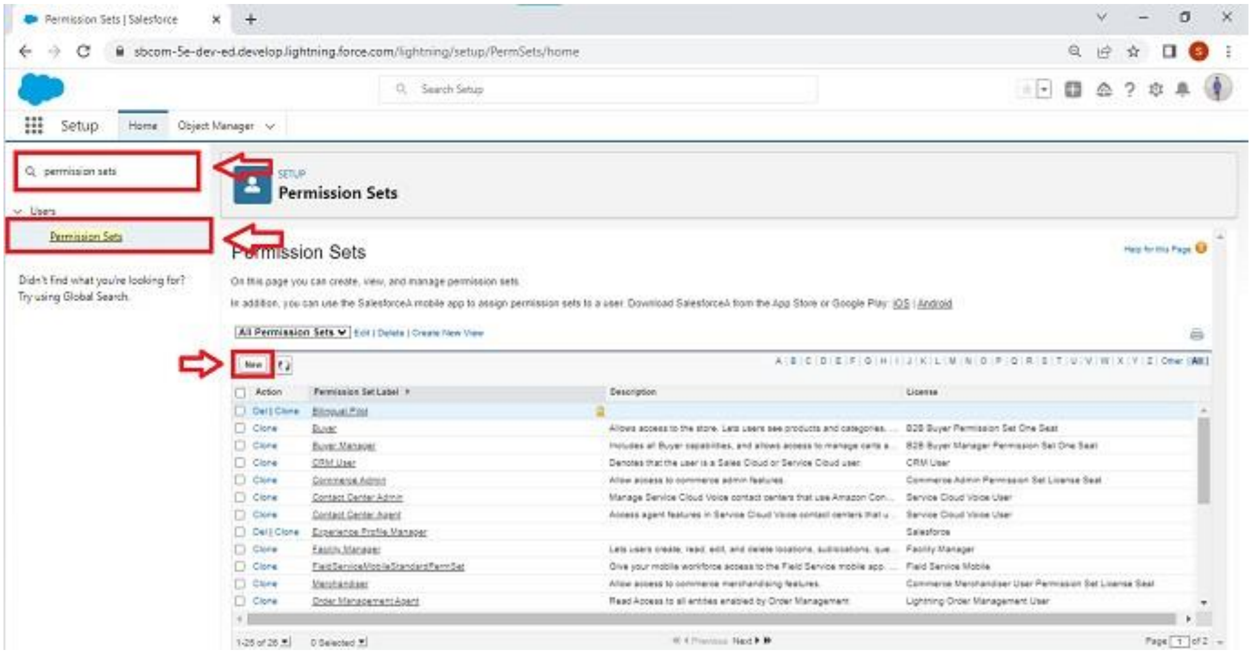
MILESTONE-7:PERMISSION SETS

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

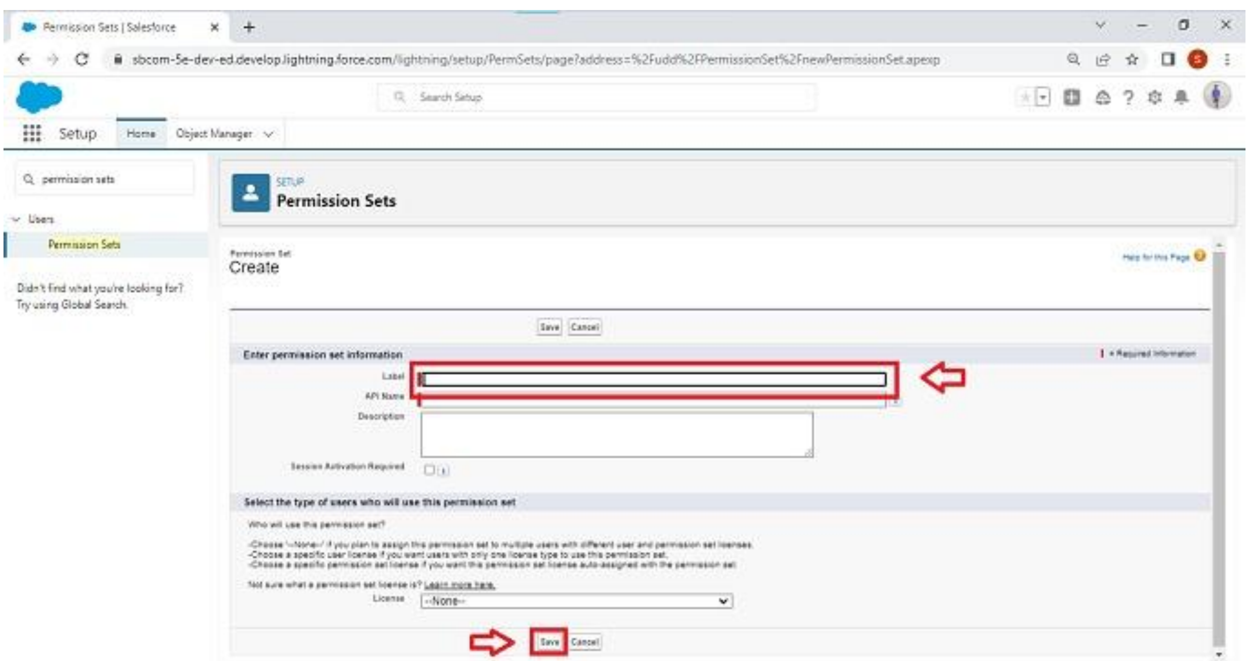
ACTIVITY-1:

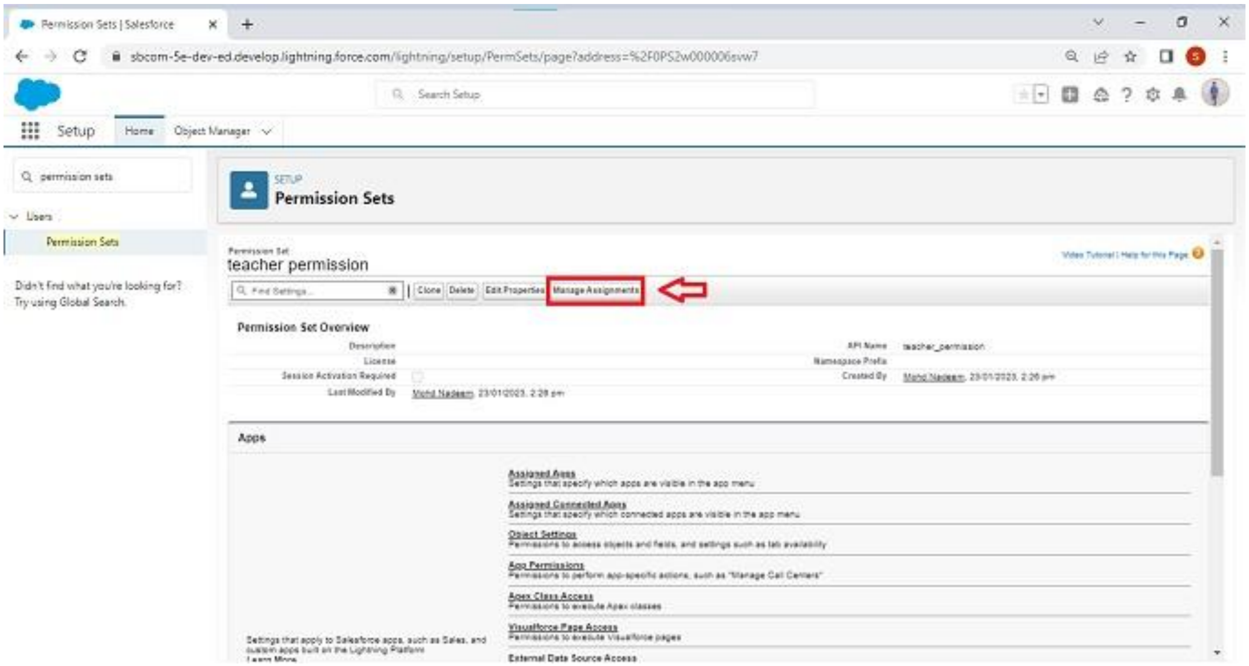
PERMISSION SETS 1:

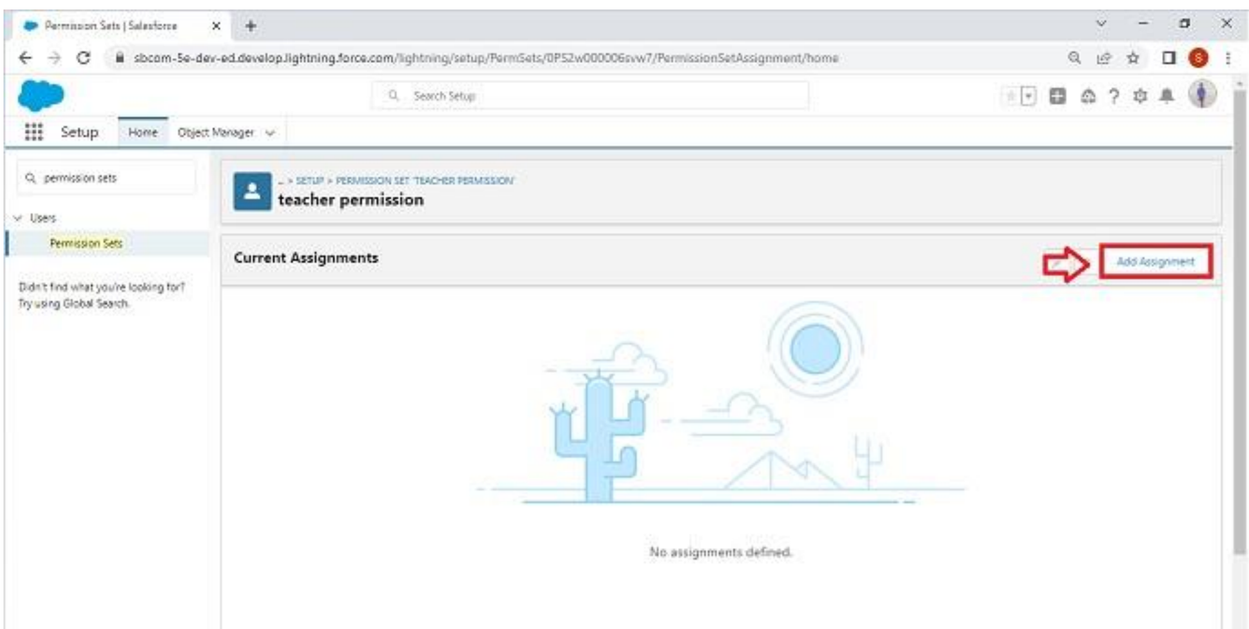
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.

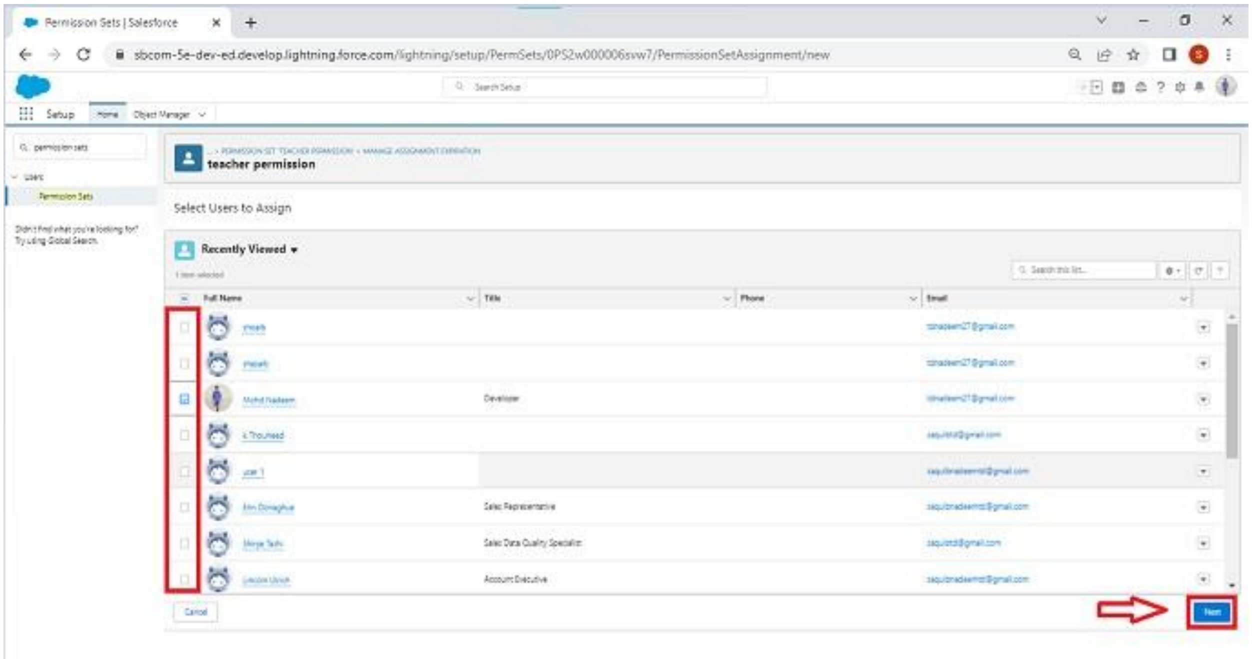


3. GIve the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assignto the teacher user




Permission Sets | Salesforce
sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000006svw7
Search Setup
Setup
Home
Object Manager
permission sets
Users
Permission Sets
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Set
teacher permission
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
API Name
teacher_permission
Apps
Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access


Permission Sets | Salesforce
sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS2w000006svw7/PermissionSetAssignment/home
Search Setup
Setup
Home
Object Manager
permission sets
Users
Permission Sets
Didn't find what you're looking for? Try using Global Search.
teacher permission
Current Assignments
Add Assignment
No assignments defined.



Similarly follow the above steps for the permission set 2.

ACTIVITY-2:
PERMISSION SETS 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. GIve the name of the Permission set name as Principal permission and then under theobject settings give all permissions for the custom objects and assign them to the Principal user.

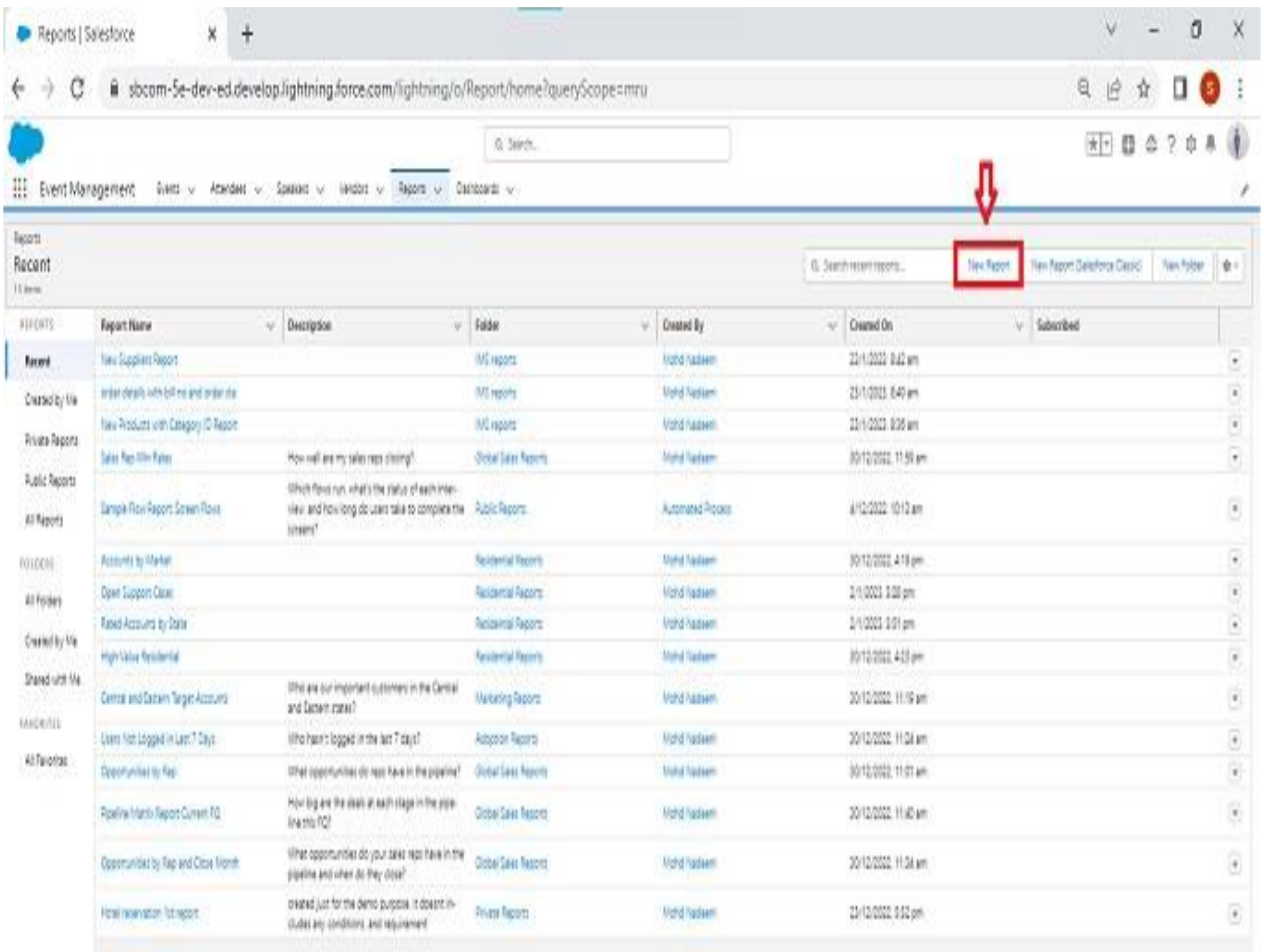
MILESTONE-8:REPORTS

A report is **a list of records that meet the criteria you define**. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report isstored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

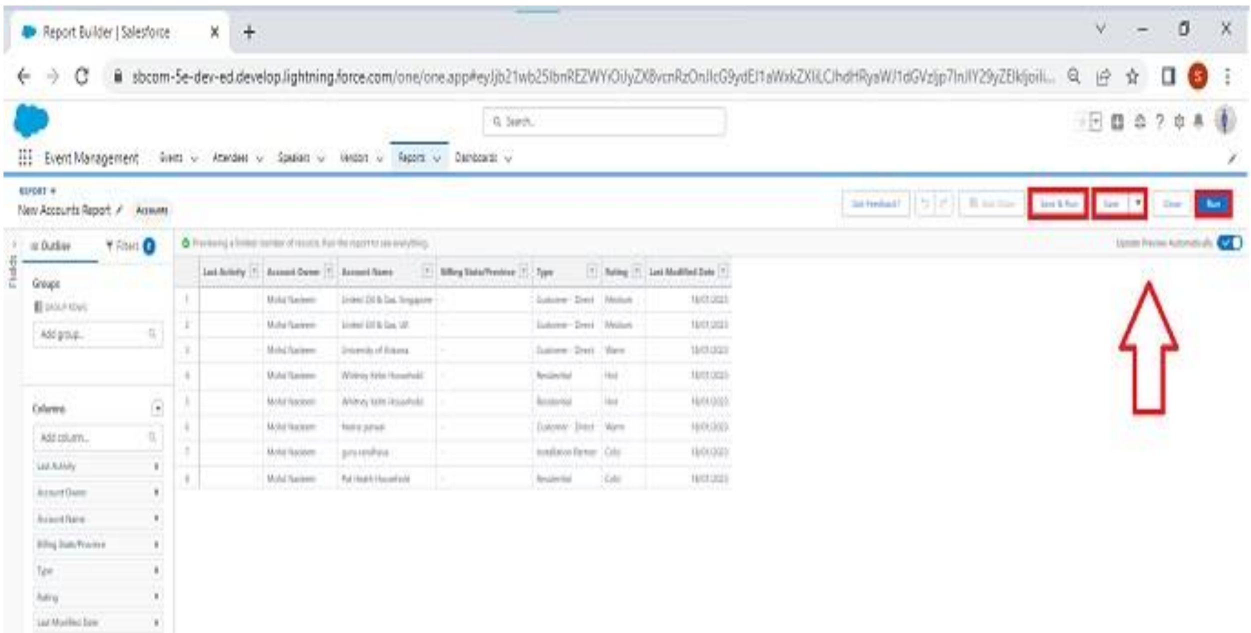
ACTIVITY:

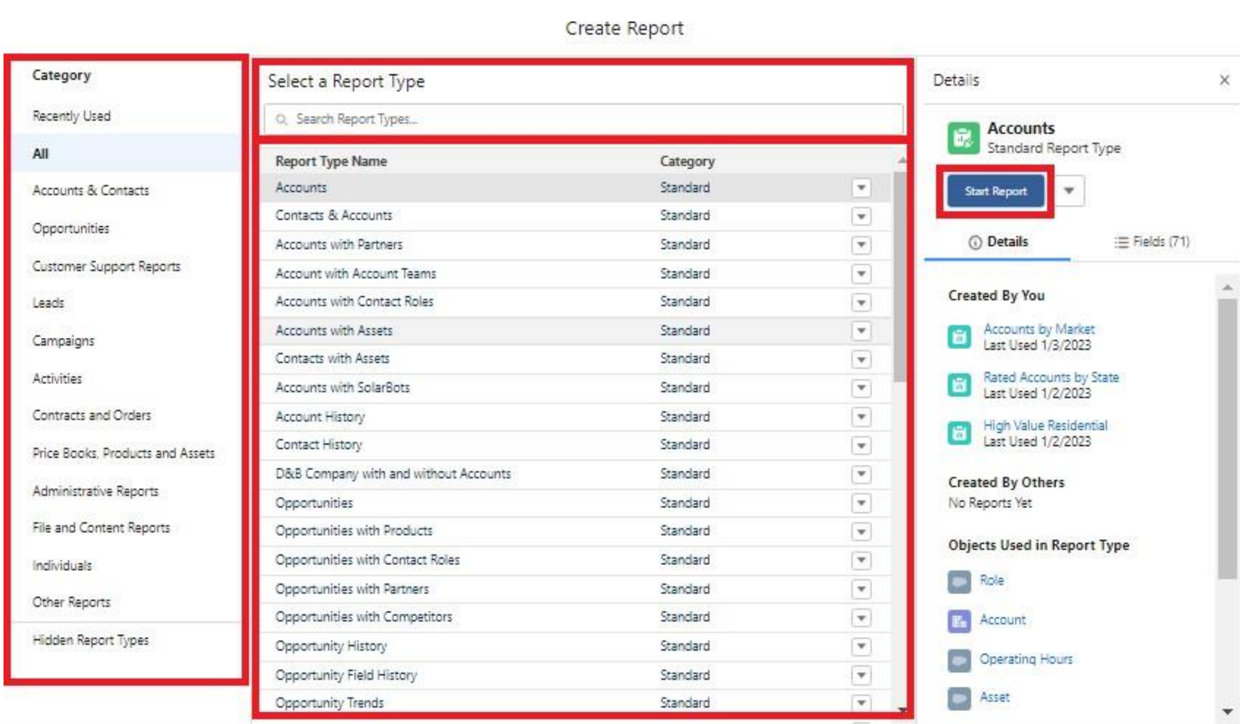
REPORTS :

1. From the Reports tab, click New Report.



2. Select the report type as School with students and parents for the report, and click Create.





3. Customize your report, then save or run it.