

A CRM APPLICATION FOR SCHOOLS / COLLEGES

1. INTRODUCTION

1.1 OVERVIEW

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

1.2 PURPOSE

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. PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

everyone updated on the success of the institution programmes

improving interactions

it will help to understand the courses

CM is a software platform built colleges and universities



get know about the project

communicate with lecturers for more guideline

Talks to a counsellor for extra help

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

how long it will take for me to get job to start my career

it will help easy to choose college

visually show that the college campus image



Also social interaction when studying online

having trouble in time management

innovative with technology

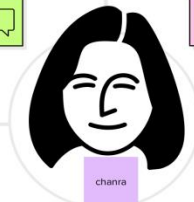
High fees

Does

What behavior have we observed?
What can we imagine them doing?

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



2.2 IDEATION AND BRAIN STORMING

CREATION OF DATABASE FOR SCHOOLS/COLLEGES

1 Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

5 minutes

PROBLEM

CREATION OF DATABASE
FOR COLLEGE

Key rules of brainstorming

To run an smooth and productive session:

- Stay in topic.
- Encourage wild ideas.
- Defer judgment.
- Listen to others.
- Go for volume.
- If possible, be visual.

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

INDIAN			DESID		
YOU STAY IN LOVE DANCE			YOU STAY IN LOVE DANCE		
	YOU STAY IN LOVE DANCE			YOU STAY IN LOVE DANCE	
		YOU STAY IN LOVE DANCE			YOU STAY IN LOVE DANCE

[illegible]

3 Group ideas

Group ideas

Use this space to group similar ideas from the brainstorm. Each group should have a title that describes what the ideas have in common. If a group is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

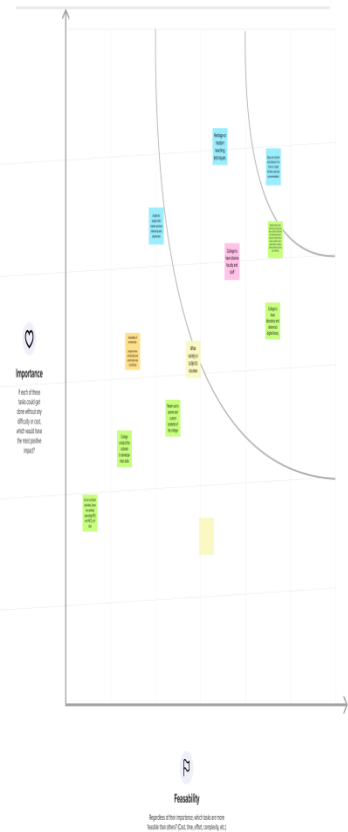
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4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

Ⓢ 20 minutes



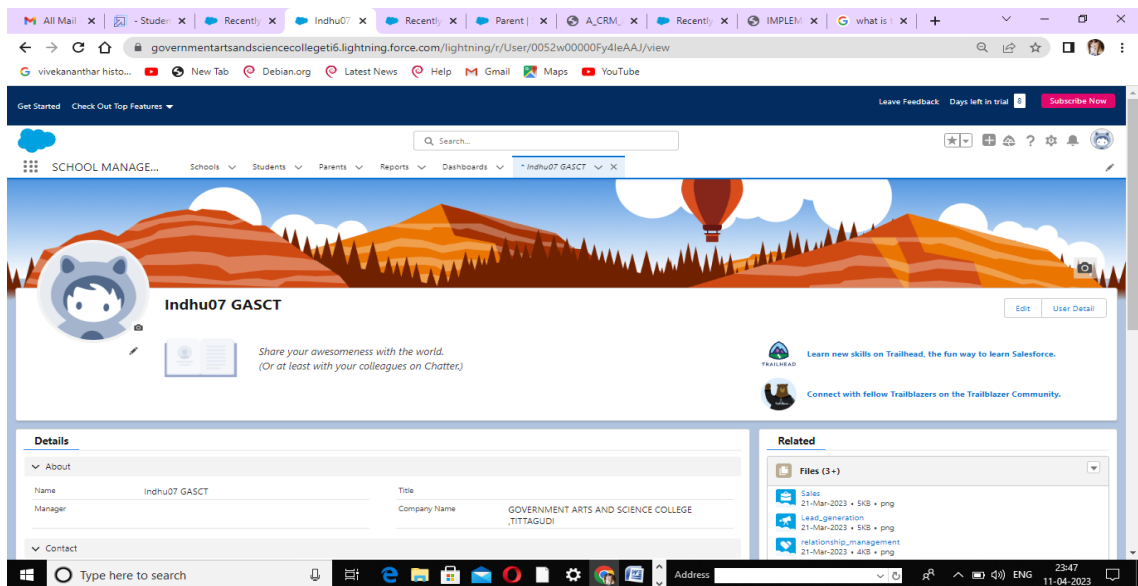
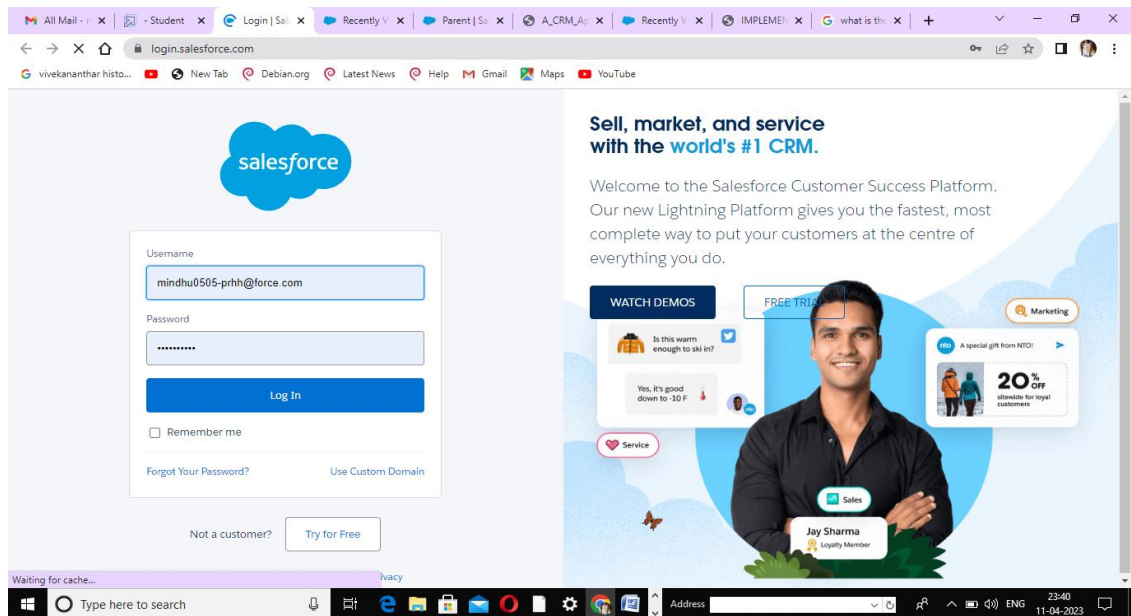
3. RESULT

3.1 Data Model

Object name	Filed in the Object	
School	Field lable	Data type
	School Name	Text
	Address	Text Area
	District	Text
	State	Text
	Phone Number	Phone
	Number of Students	Roll-up Summary
	Highest Marks	Roll-up Summary
Student	Field lable	Data type
	Student Name	Text
	Student ID	Text
	Class	Number
	Result	Picklist
	Marks	Number
	Phone Number	Phone
Parent	Filed lable	Data type
	Parent Name	Text
	Parent ID	Text
	Parent Number	Phone
	Parent Address	Text Area

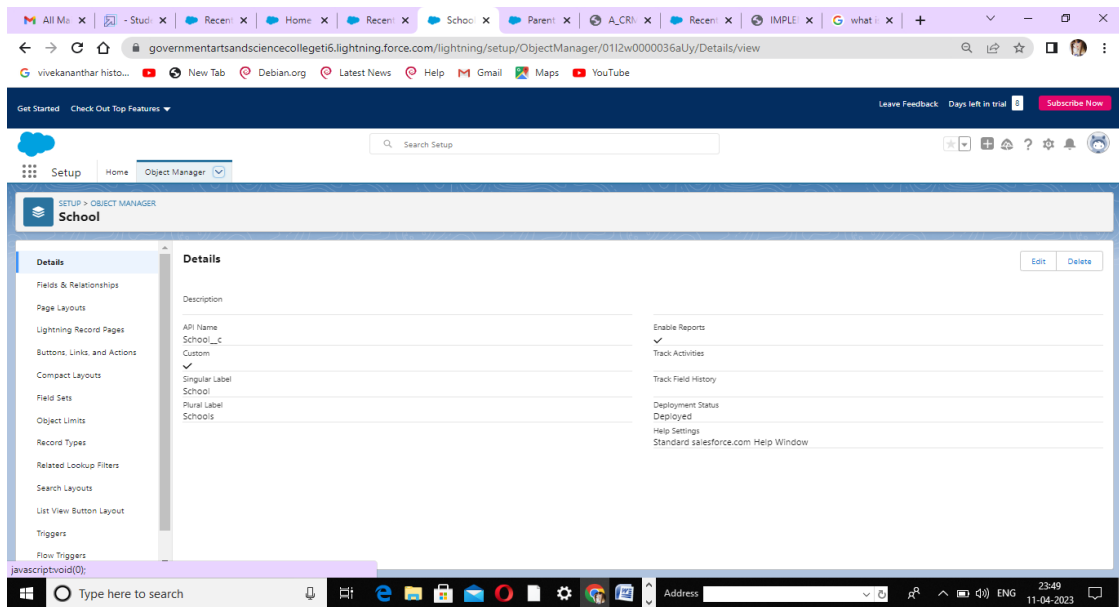
3.2 Activity and Screenshot

3.2.1 Creating Developer Account

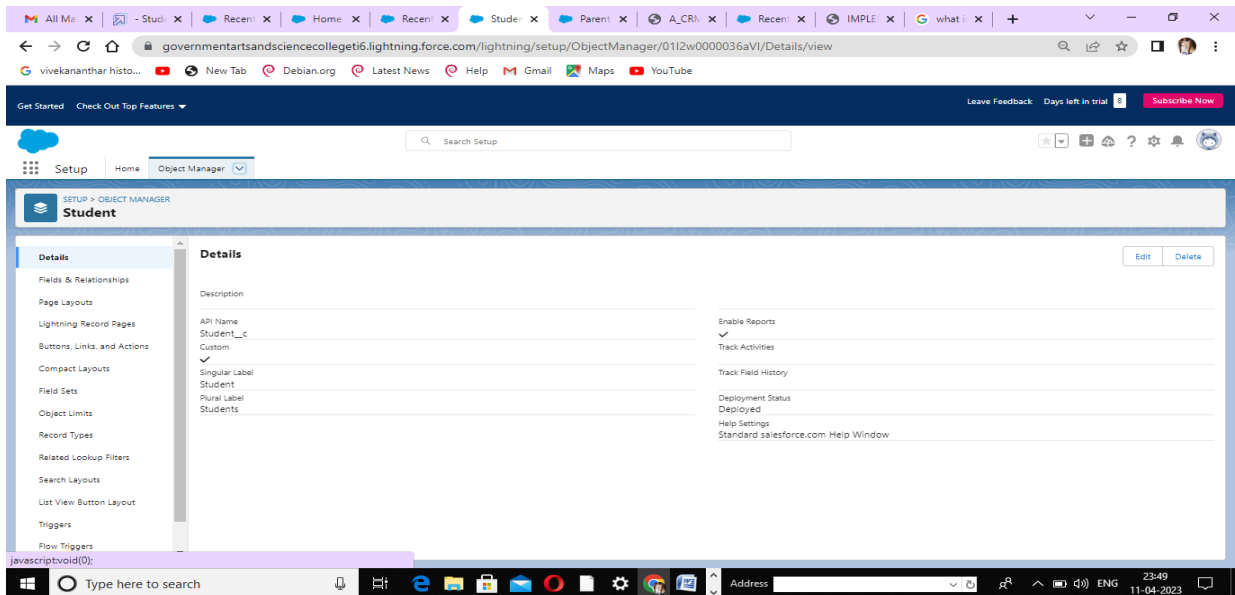


3.2.2. Creating Custom Objects

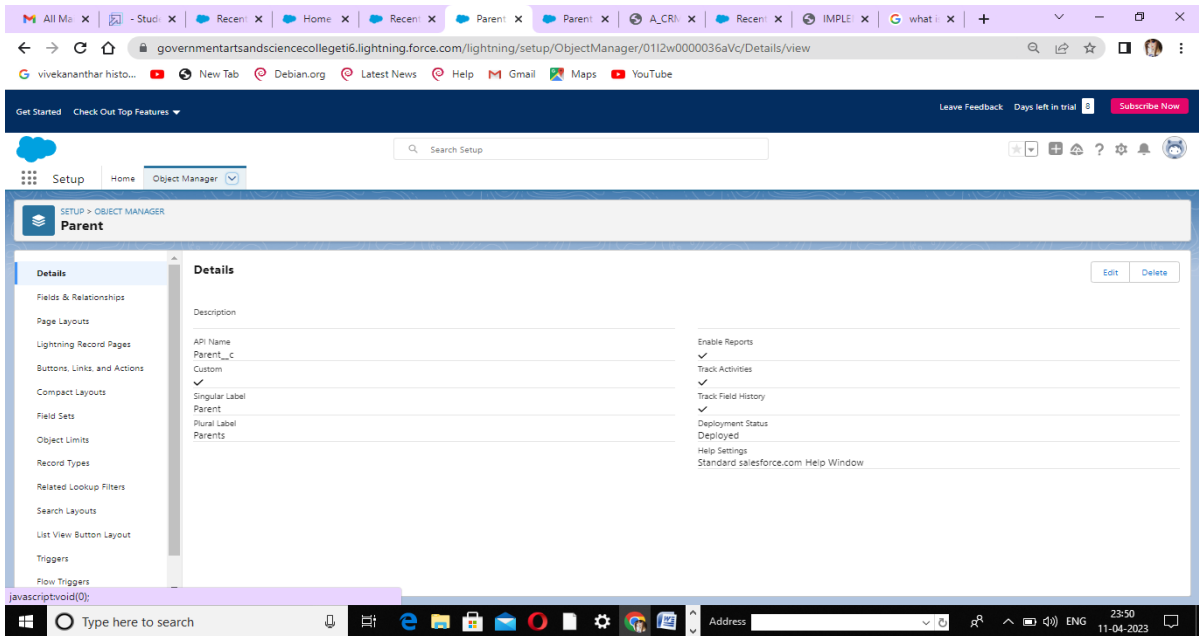
➤ School



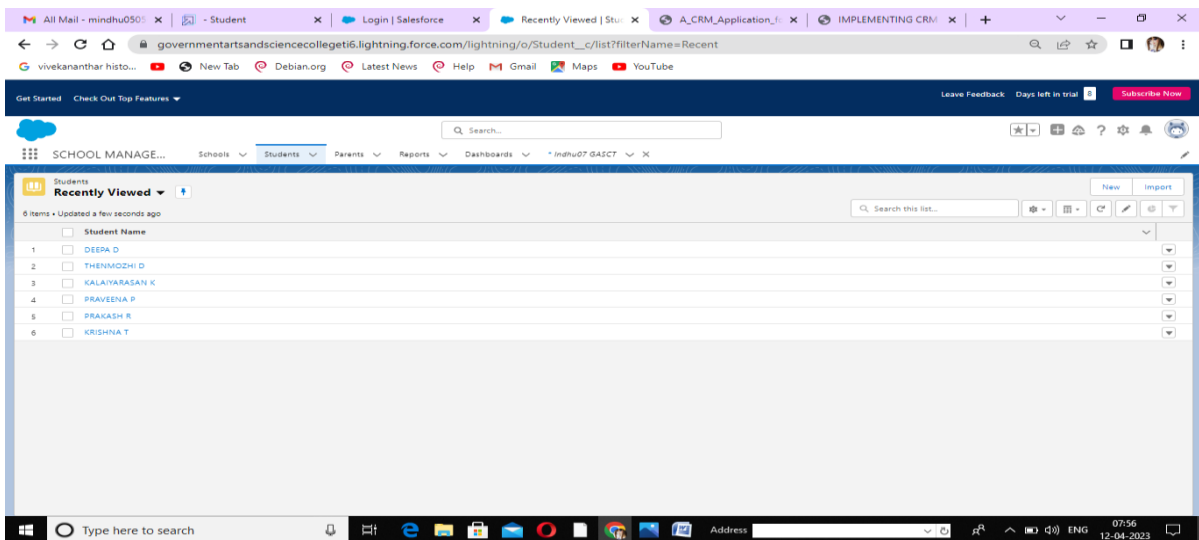
➤ Student



➤ Parent



3.2.3 Creating the School Management App



3.2.4 Creating Custom Fields for the Objects

- School(object)
- School Name
- Address
- District
- State
- Phone Number
- Number of Students
- Highest Marks

governmentartsandsciencecollege16.lightning.force.com/lightning/setup/ObjectManager/0112w0000036aUy/FieldsAndRelationships/view

Get Started Check Out Top Features

Search Setup

Setup Home Object Manager

School

Details

Fields & Relationships

10 Items Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
State	State__c	Text Area(255)		

Type here to search

Address

23:49 11-04-2023

- Student(object)
- Student Name
- Student ID
- Class
- Result
- Marks
- Phone Number

governmentartsandsciencecollege16.lightning.force.com/lightning/setup/ObjectManager/0112w0000036aVI/FieldsAndRelationships/view

Get Started Check Out Top Features

Search Setup

Setup Home Object Manager

Student

Details

Fields & Relationships

9 Items Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Result	Result__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student ID	Student_ID__c	Text(80)		
Student Name	Name	Text(80)		✓

Type here to search

Address

23:50 11-04-2023

- Parent(object)
- Parent Name
- Parent ID
- Parent Number
- Parent Address

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Last Modified By, Owner, Parent Address, Parent ID, Parent Name, and Parent Number.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		
Parent Address	Parent_Address__c	Text Area(255)		
Parent ID	Parent_ID__c	Text(80)		
Parent Name	Name	Text(80)		
Parent Number	Parent_Number__c	Phone		

3.2.5. Creating on Profile

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. A table lists various user profiles, including Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, CPQ Integration User, End User, Executive Sponsor, Identity User, Marketing User, Minimum Access - Salesforce, School Profile, Solution Manager, Standard User, and System Administrator. The 'School Profile' is highlighted.

Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	<input type="checkbox"/>
Edit	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit	Contract Manager	Salesforce	<input type="checkbox"/>
Edit	CPQ Integration User	CPQ Integration User	<input type="checkbox"/>
Edit Del	End User	Salesforce	<input checked="" type="checkbox"/>
Edit Del	Executive Sponsor	Salesforce	<input checked="" type="checkbox"/>
Edit	Identity User	Identity	<input type="checkbox"/>
Edit	Marketing User	Salesforce	<input type="checkbox"/>
Edit	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit Del	School Profile	Salesforce	<input checked="" type="checkbox"/>
Edit	Solution Manager	Salesforce	<input type="checkbox"/>
Edit	Standard User	Salesforce	<input type="checkbox"/>
Edit	System Administrator	Salesforce	<input type="checkbox"/>

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

[All Permission Sets](#) | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
Del Clone	Principal permission		
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
Del Clone	Sales User		
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS ...	Cloud Integration User
Clone	Sales Console User	Enable Salesforce Console User	Sales Console User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
Del Clone	Teacher permission		
Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account app.	Your Account App

3.2.7 Creating Reports

Reports

Recent

5 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Schools with Students Report		Private Reports	Indhu07 GASCT	5/4/2023, 9:41 pm	
Created by Me	Parents Report		Private Reports	Indhu07 GASCT	5/4/2023, 9:43 pm	
Private Reports	Marketing Exec Leads by Source		Sales and Marketing Reports	Indhu07 GASCT	21/3/2023, 11:29 am	
Public Reports	Sales Person Activity		Sales and Marketing Reports	Indhu07 GASCT	21/3/2023, 11:29 am	
All Reports	Sales Exec Pipeline		Sales and Marketing Reports	Indhu07 GASCT	21/3/2023, 11:29 am	

3.2.8 Creating Dashboard

governmentartsandsciencecollegeti6.lightning.force.com/lightning/r/Dashboard/01Z2w000000RtxPEAS/view?queryScope=userFolders

Schools with Students Report

Student: Student Name ↑	School: School Name	Student ID	Class	Marks
DEEPA D	GOVERNMENT HIGHER SECONDARY SCHOOL, KARUVEPPILAN KURICHI	1002206	12	575
KALAIYARASAN K	GOVERNMENT HIGHER SECONDARY SCHOOL, KARUVEPPILAN KURICHI	1002204	12	498
KRISHNA T	GOVERNMENT HIGHER SECONDARY SCHOOL, KARUVEPPILAN KURICHI	1002201	12	488
PRAKASH R	GOVERNMENT HIGHER SECONDARY SCHOOL, KARUVEPPILAN KURICHI	1002202	12	574
PRAVEENA P	GOVERNMENT HIGHER SECONDARY SCHOOL, KARUVEPPILAN KURICHI	1002203	12	560
THENMOZHI D	GOVERNMENT HIGHER SECONDARY SCHOOL, KARUVEPPILAN KURICHI	1002205	12	500

View Report (Schools with Students Report)

governmentartsandsciencecollegeti6.lightning.force.com/lightning/r/Dashboard/01Z2w000000RtwgEAC/view?queryScope=userFolders

Parent Report

Parents Report

Parent: Parent Name ↑	Parent Number	Parent ID	Parent Address
MANI M	9743479654	12A03	5,KOIVIL STREET,INDRANAGAR,ATHYUR(NORTH),PERAMBALUR-621108
MAKAKRISHNAN	9737763985	12A02	215,COLONNY SREET,MUDHUKULAM,ADHANAKURICHI,SENDURA(TI),ARIYALUR-621719
MUTHUVEL V	9632888074	12A01	34,EAST STREET,T.V.PUTHUR,VRI,DHACHALAM(TI),CUDDALORE-606110
SARAN P	9150843113	12A04	26,PERIYAR NAGAR TITTAQUDI,CUDDALORE-606106
SUBRAMANI N	8925555337	12A05	62,periyar nagar,vridhachalam-606110
VELMURUGAN K	9756329935	12A06	5,EARIKARAI STREET,SCHANGADU,THALAVOI-621730

4. TRAILHEAD PROFILE PUBLIC URL

Team lead <https://trailblazer.me/id/indhm5>

Team Member 1 - <https://trailblazer.me/id/ddeepa75>

Team Member 2 - <https://trailblazer.me/id/harisri06>

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

5. ADVANTAGES AND DISADVANTAGES

Advantages:

- Reduction In The Cost Of Expenses
- Improving The Quality Of Service
- Improving The Organization Management Process
- History Of Work With Each Student
- track every communication with a prospective family
- understand which stage of the admissions journey a family is in
- set reminders or tasks to create follow-ups
- send families communications that are targeted to their requirements or the child's interests.

Disadvantages:

- Administration cannot edit or modify scores after the deadline
- Minor technical glitches and issues may occur
- It can be prone to hacks

6.APPLICATION:

a system that helps schools manage the entire lifecycle of a potential customer — sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access place.

7.CONCLUSION

The goal of the system is achieved and difficulties are solved. The project is built such that it is user friendly .The project can be easily used in School for School Administration system.

8. Future Scope

- Global Learning
- Efficient School Administration
- Streamlined processes