

A CRM APPLICATION FOR SCHOOLS/COLLEGE

1 INTRODUCTION

1.1 Overview

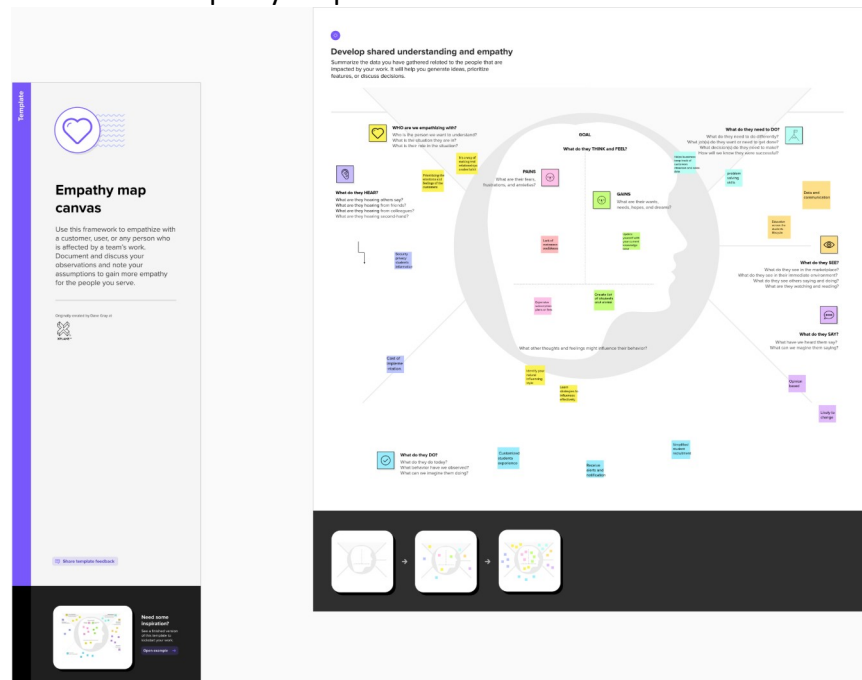
This project helps you to maintain and manage the school related problems which further can be modified based on the requirements

1.2 Purpose

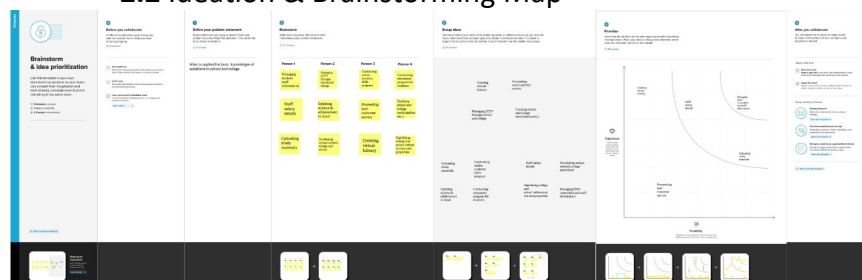
Students and parents details collect privacy in the School management cloud

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

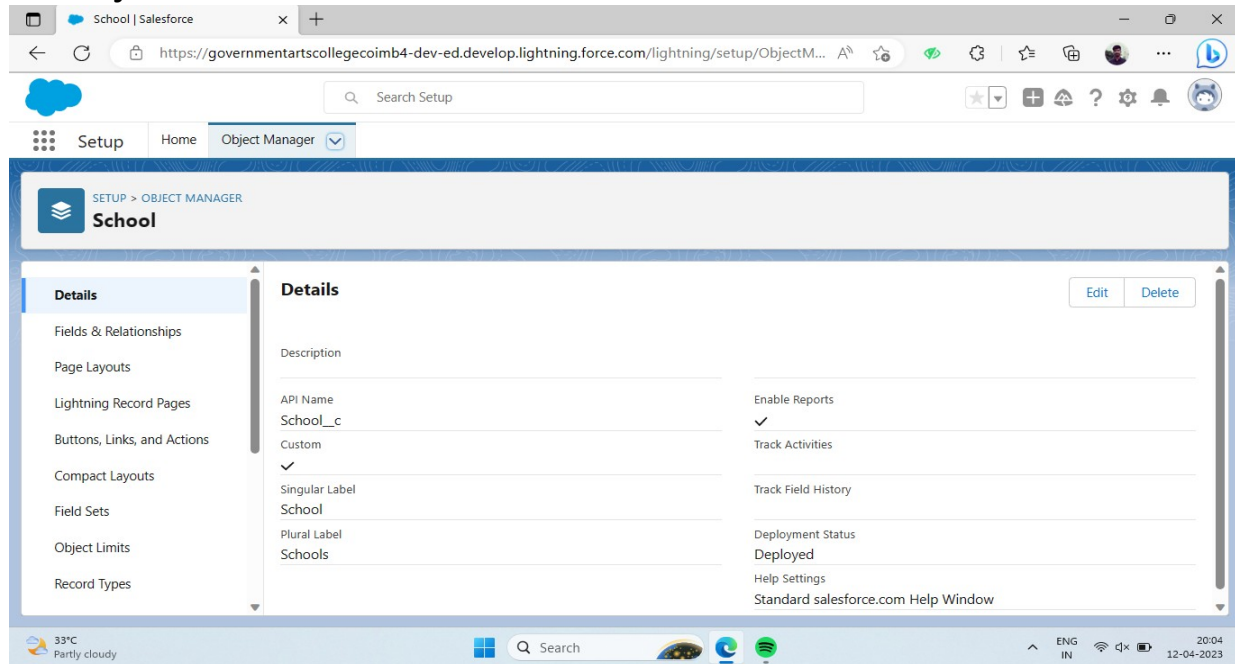
Object name	Fields in the Object	
School	Field lable	Data Type
	Address	Text Area
	District	Text Area
	State	Text Area
	School websites	Text Area
	Phone Number	Phone
	Number of students	Roll-up summary
	Highest Marks	Roll-up summary
Students	Field lable	Data Type
	Phone Number	Phone
	school	Master-Detailed
	Results	Picklist
	Class	Number
Parent	Field lable	Data Type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

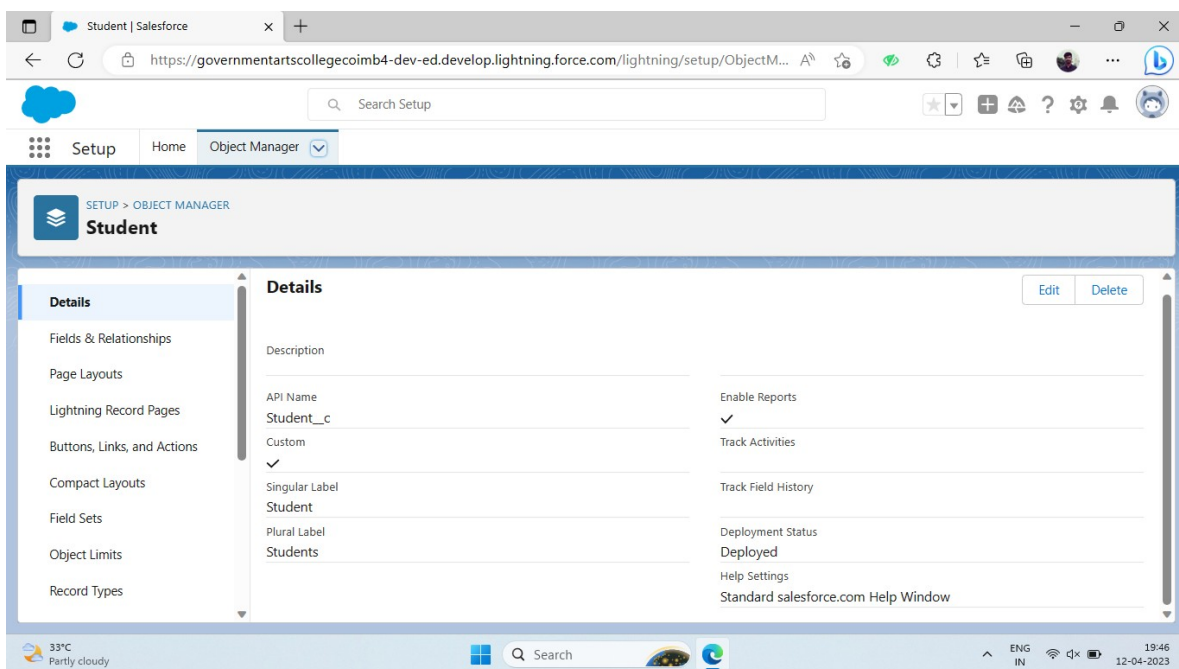
1. Creating Developer Account

Login to Salesforce account

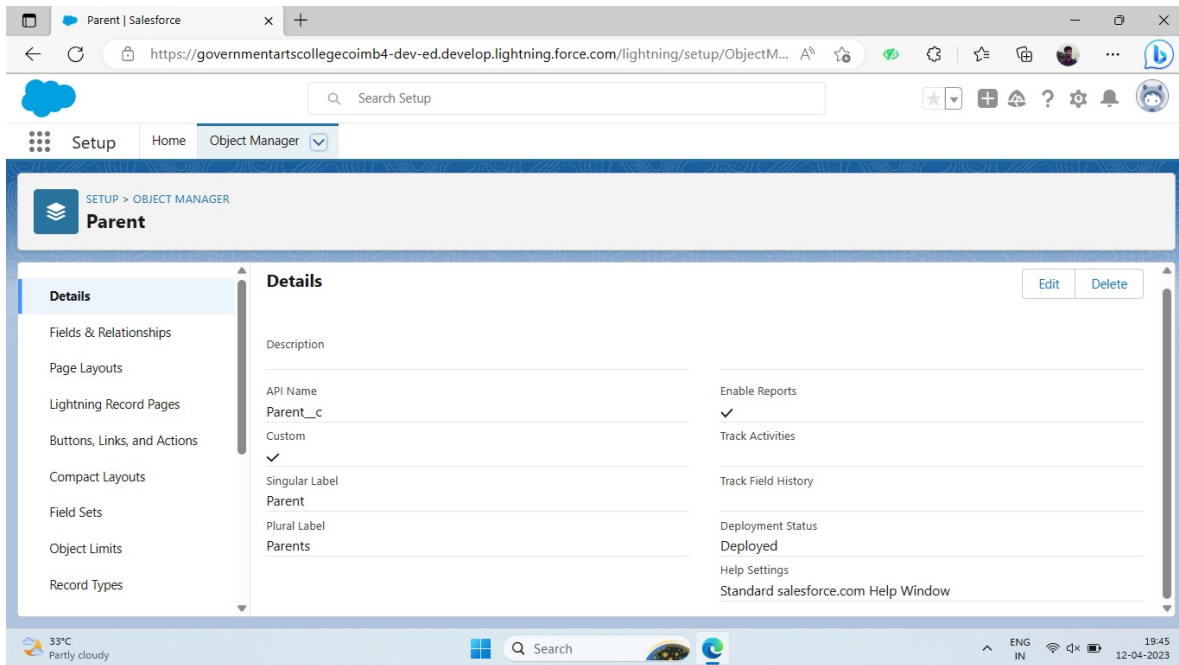
2.Object



We are created **School** object

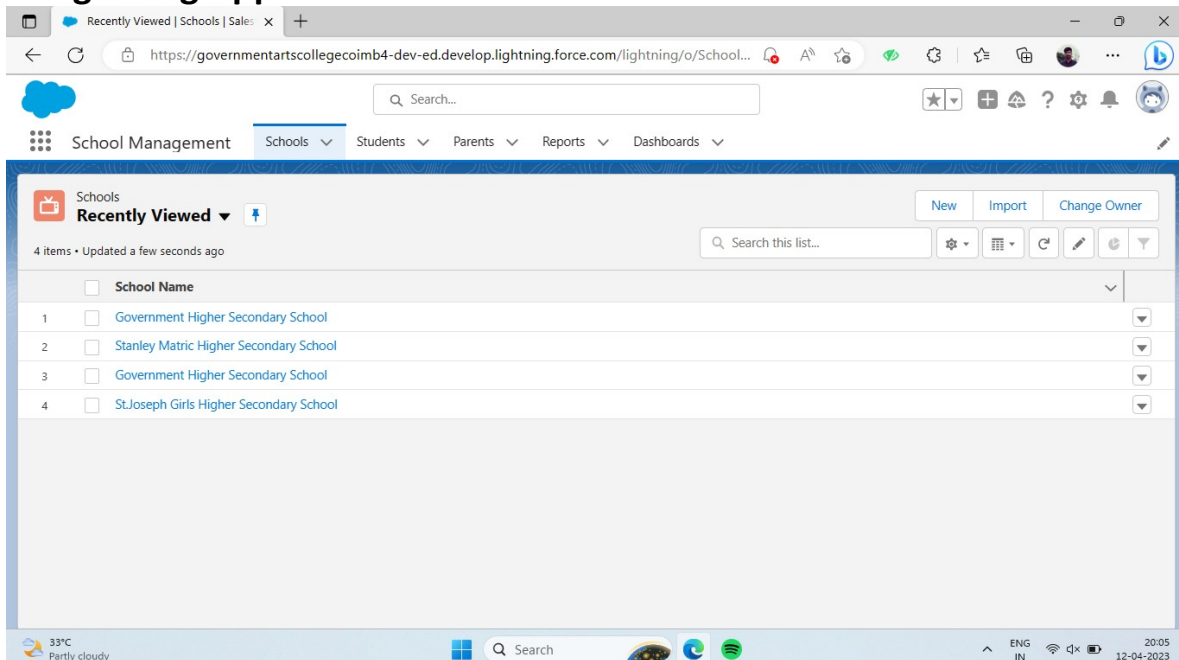


We are Created **Student** object



We are Created **Parent** object

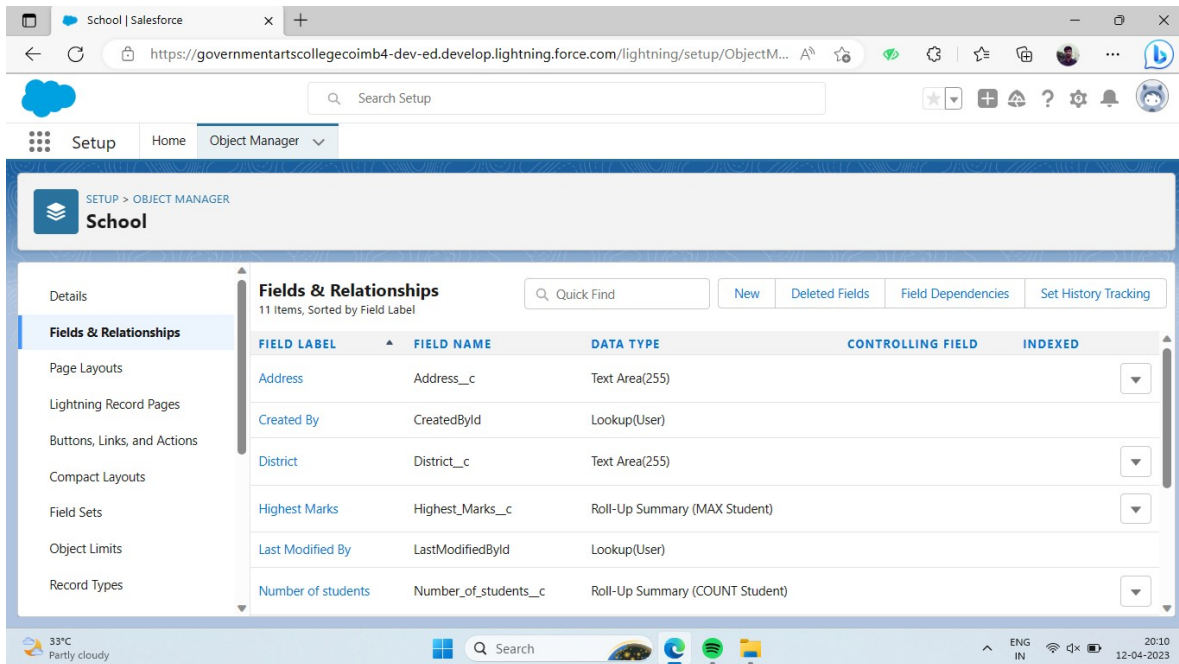
3. Lightning App



We are created **School Management** Lightning App

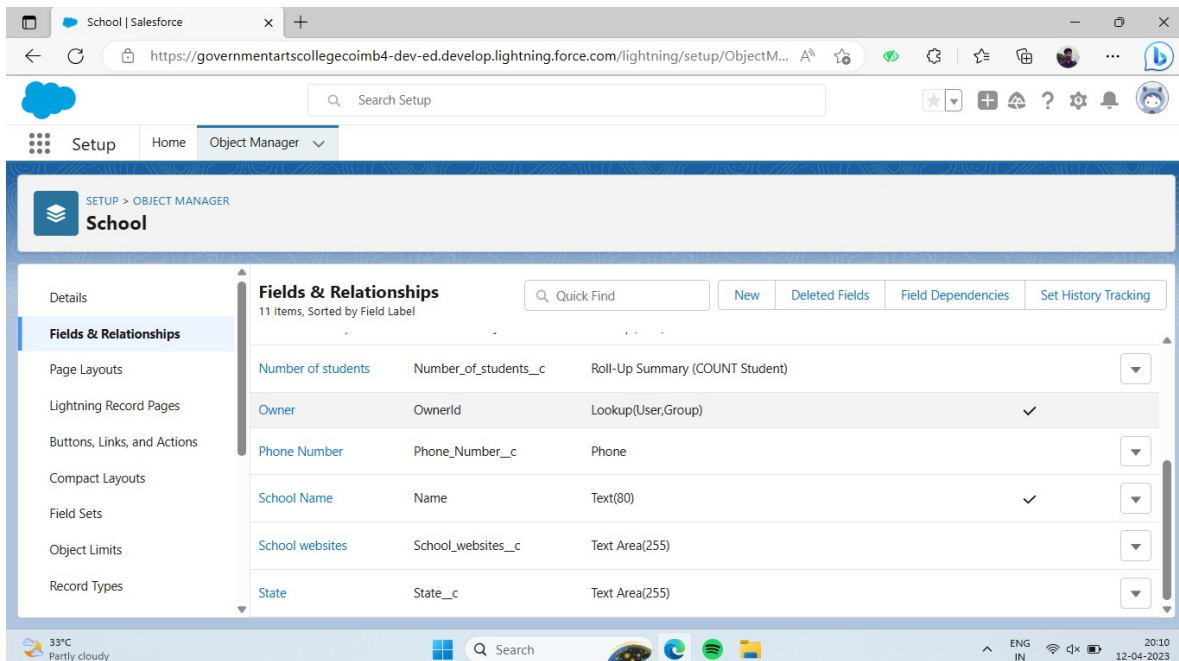
4.Fields & Relationship

School



The screenshot shows the Salesforce Object Manager interface for the 'School' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

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_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Student)		



The screenshot shows the Salesforce Object Manager interface for the 'School' object, with the 'Fields & Relationships' tab selected. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓
School websites	School_websites__c	Text Area(255)		
State	State__c	Text Area(255)		

We have created Fields & Relationship for School object

Address

District

State

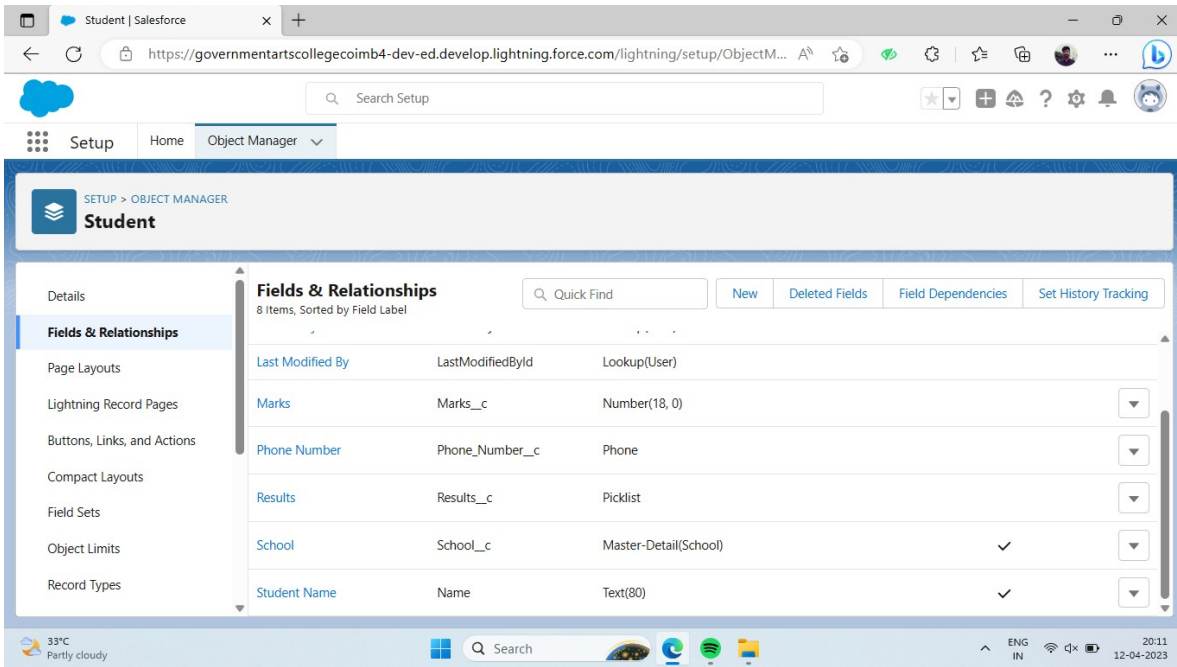
School websites

Phone Number

Number of students

Highest Marks

Student



The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Fields & Relationships' and shows a list of 8 items, sorted by Field Label. The list includes fields like 'Last Modified By', 'Marks', 'Phone Number', 'Results', 'School', and 'Student Name'. Each row displays the field name, its API name, and its data type. For example, 'Student Name' is a Text field with a length of 80 characters. The interface also includes a search bar, a 'Quick Find' button, and tabs for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

Field Name	API Name	Data Type
Last Modified By	LastModifiedById	Lookup(User)
Marks	Marks__c	Number(18, 0)
Phone Number	Phone_Number__c	Phone
Results	Results__c	Picklist
School	School__c	Master-Detail(School)
Student Name	Name	Text(80)

We have created Fields & Relationship for Students object

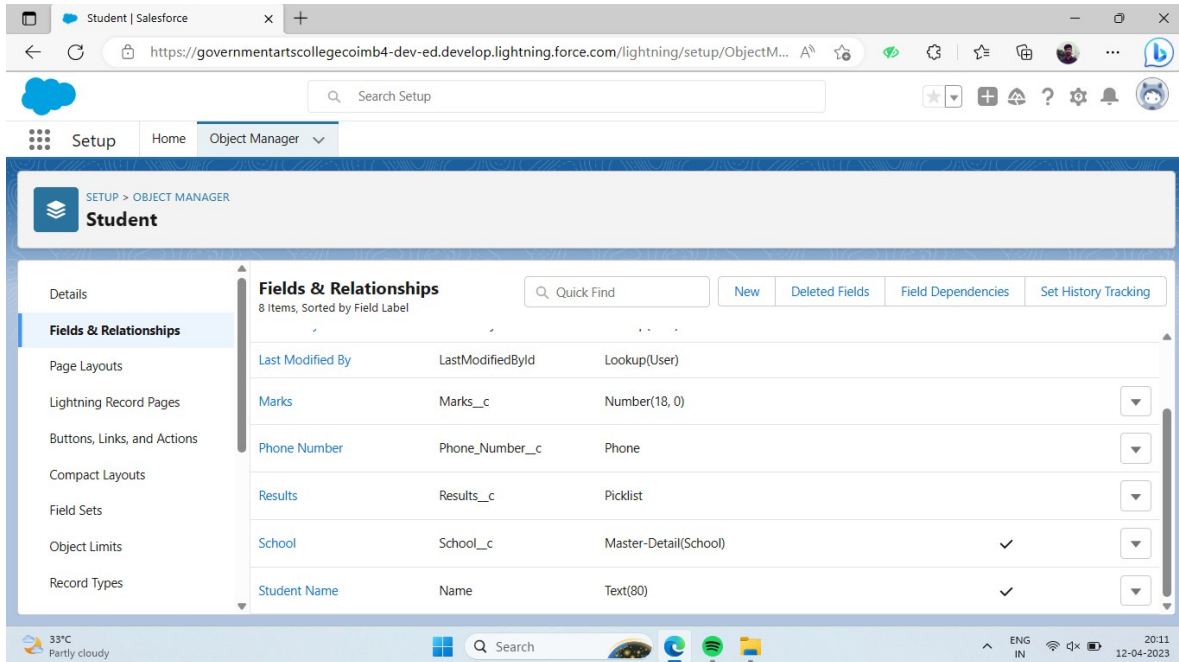
Phone Number

school

Results

Class

Parent



The screenshot shows the Salesforce Setup page for the 'Student' object in the Object Manager. The 'Fields & Relationships' tab is selected, showing a list of 8 items. The table below represents the data shown in the screenshot:

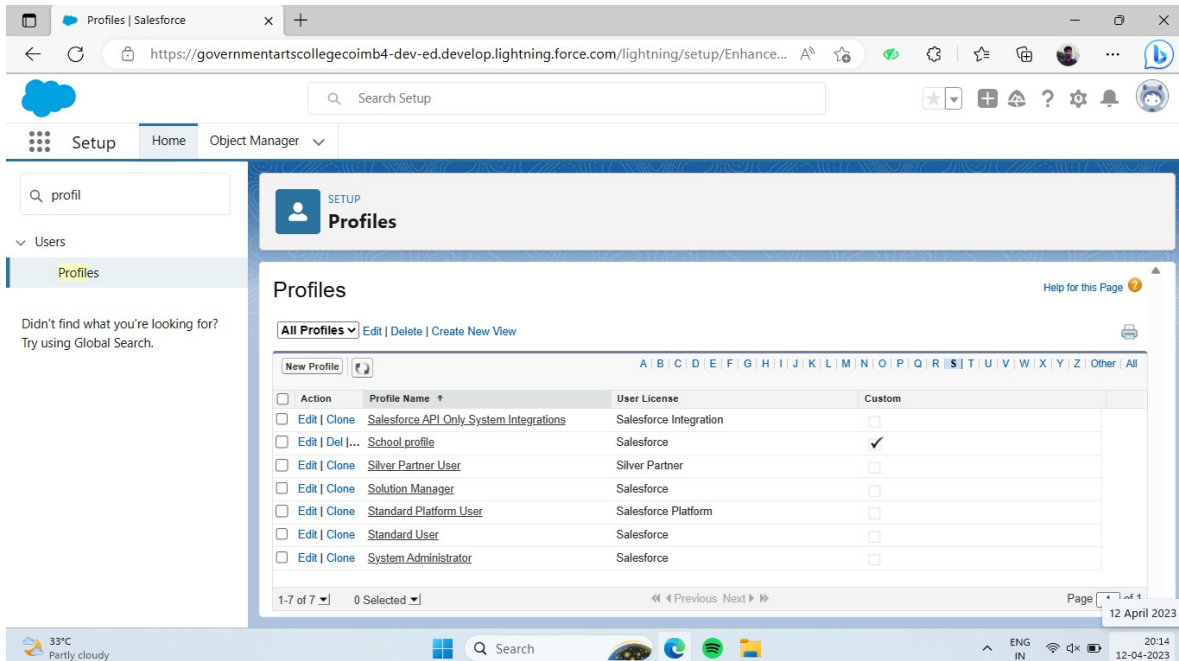
Field Label	Field Name	Field Type	Required	Visible
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)	✓	
Student Name	Name	Text(80)	✓	

We have created Fields & Relationship for Parent Object

Parent Address

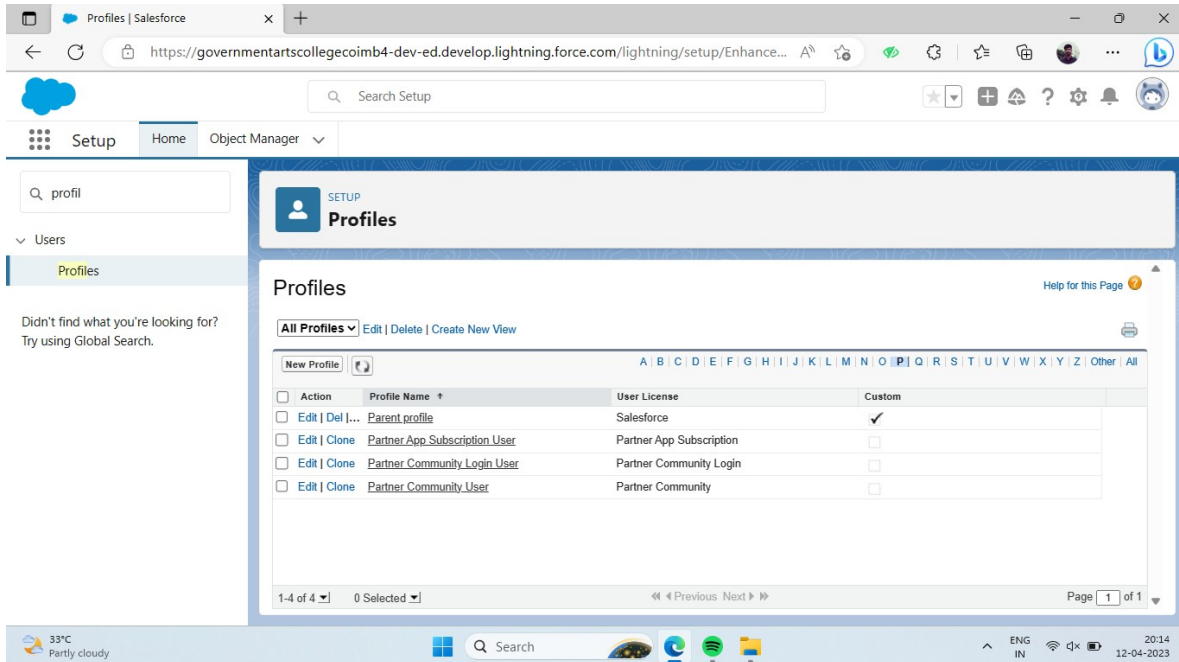
Phone Number

5.Profile



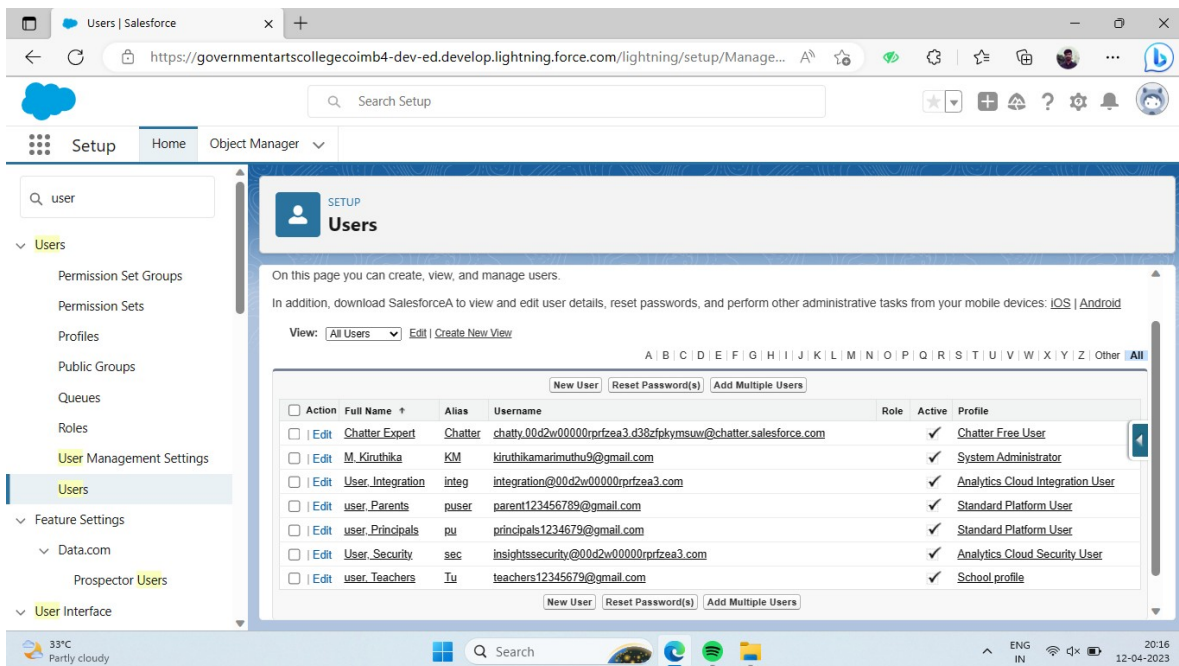
The screenshot shows the Salesforce Setup page for Profiles. The 'Profiles' tab is selected, displaying a table of existing profiles. The table below represents the data shown in the screenshot:

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



Created School Profile

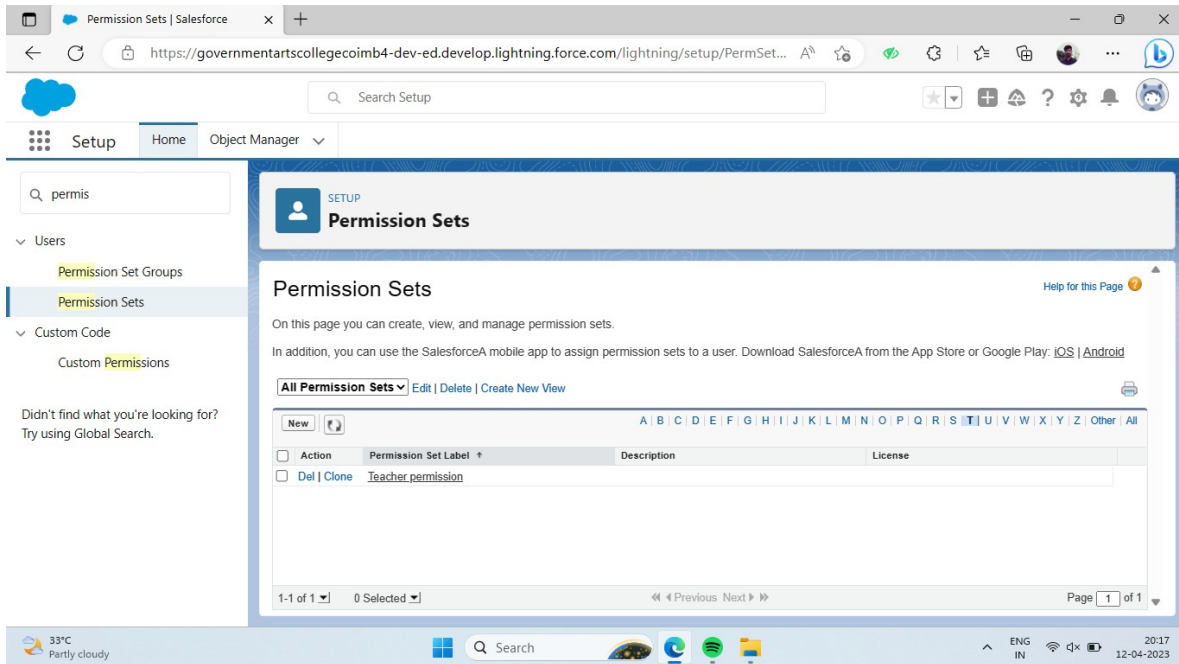
6.Users



We created Users

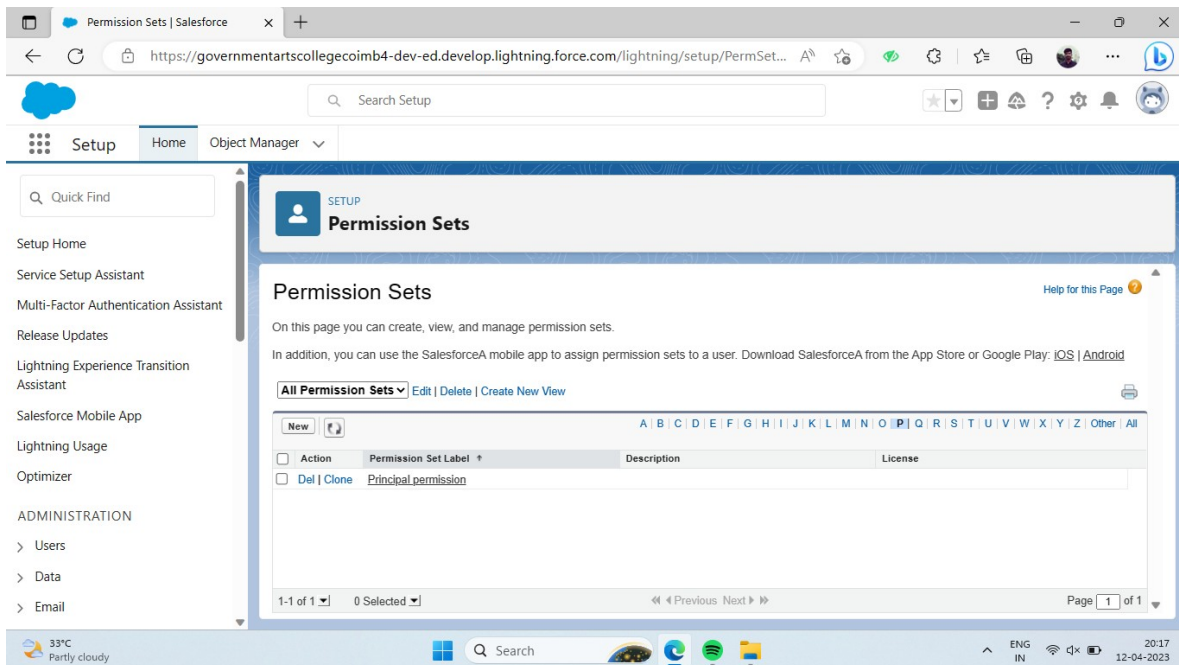
1. Parents Users
2. Principle Users
3. Teachers Users

7.Permission Sets



The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a search bar with 'permis' and a list of navigation items: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a 'New' button and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. One permission set is listed: 'Teacher permission'.

Action	Permission Set Label	Description	License
Del Clone	Teacher permission		

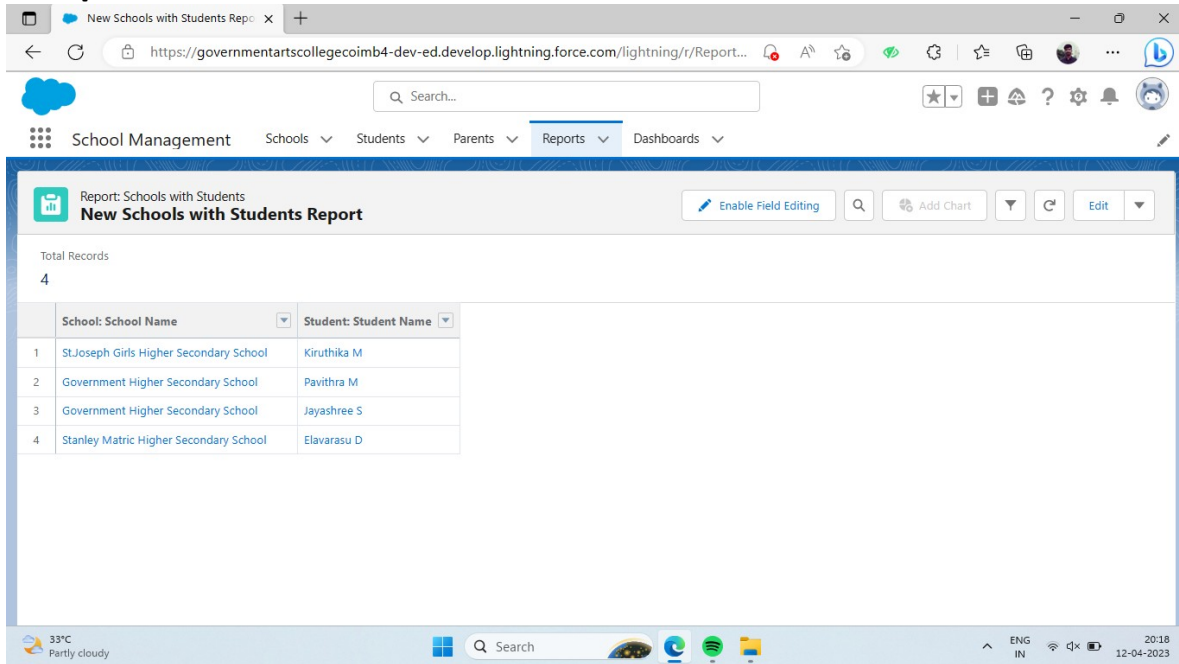


The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a search bar with 'Quick Find' and a list of navigation items: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Data, and Email. The main content area is titled 'Permission Sets' and includes a 'New' button and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. One permission set is listed: 'Principal permission'.

Action	Permission Set Label	Description	License
Del Clone	Principal permission		

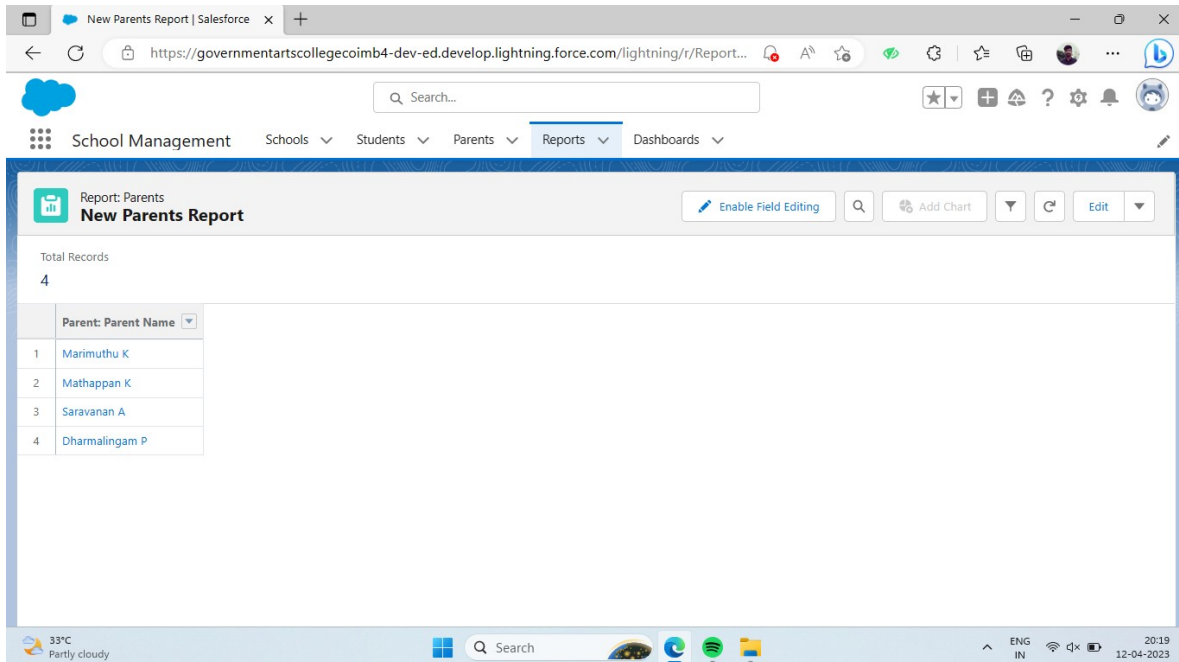
We have assigns to the **Teacher Permission** and **Principal Permission**

8. Reports



The screenshot shows a Salesforce Lightning interface for a report titled "New Schools with Students Report". The report is displayed in a table format with 4 total records. The table has two columns: "School: School Name" and "Student: Student Name".

	School: School Name	Student: Student Name
1	St.Joseph Girls Higher Secondary School	Kiruthika M
2	Government Higher Secondary School	Pavithra M
3	Government Higher Secondary School	Jayashree S
4	Stanley Matric Higher Secondary School	Elavarasu D



The screenshot shows a Salesforce Lightning interface for a report titled "New Parents Report". The report is displayed in a table format with 4 total records. The table has one column: "Parent: Parent Name".

	Parent: Parent Name
1	Marimuthu K
2	Mathappan K
3	Saravanan A
4	Dharmalingam P

Reports are generated :

1. School with Students Reports
2. Parents Reports

4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/kirum11>

Team Member 1 -

<https://trailblazer.me/id/jshree30>

Team Member 2–

<https://trailblazer.me/id/pm20bma008>

Team Member 3–

<https://trailblazer.me/id/elast2106>

5 ADVANTAGES & DISADVANTAGE

ADVANTAGES

- Improve Student Admissions Lifecycle. ...
- Track Student Life-Cycles Within the Institution.
- Keep Alumni Information Safe and Accessible.
- Stay Connected with Teams
- Monitor Fee Payments and Reminders.

DISADVANTAGE

- Loss of collected information or records
- Can be accessed by the third party
- Experience-based procedure in all the stages

6 APPLICATIONS

- Lead nurturing
- Lead Management
- User Management
- Reports and Analytics

7 CONCLUSION

The system will greatly simplify and speed the management process. It will describe the paper work. The admin, faculty or the student will perform all the task very easily and more convenience way.

8 FUTURE SCOPE

CRMs for higher education enable universities to streamline their communications and track and report on an individual's journey within the institution. This leads to a more engaged student and alumni body, better understanding across teams, and, eventually, increased ROI.

The nature of higher education means CRM requirements for higher education are different from that of other organizations. To understand which CRM is best for your organization, you must first understand how these needs are different.