

CRM APPLICATION FOR SCHOOL & COLLEGES

1. INTRODUCTION

1.1 Overview

A CRM is 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.

1.2 Purpose

- CRM is best for its services. It is a smart decision to access some business. In the educational field either, it is a school or college, the load of work is more. It is always a question of how they manage the record of students, staffs and other employees in a perfect way. But the customer relationship

management system solves this
problem easily.

2. Problem Definition & Design Thinking

2.1 Empathy Map

Empathy map

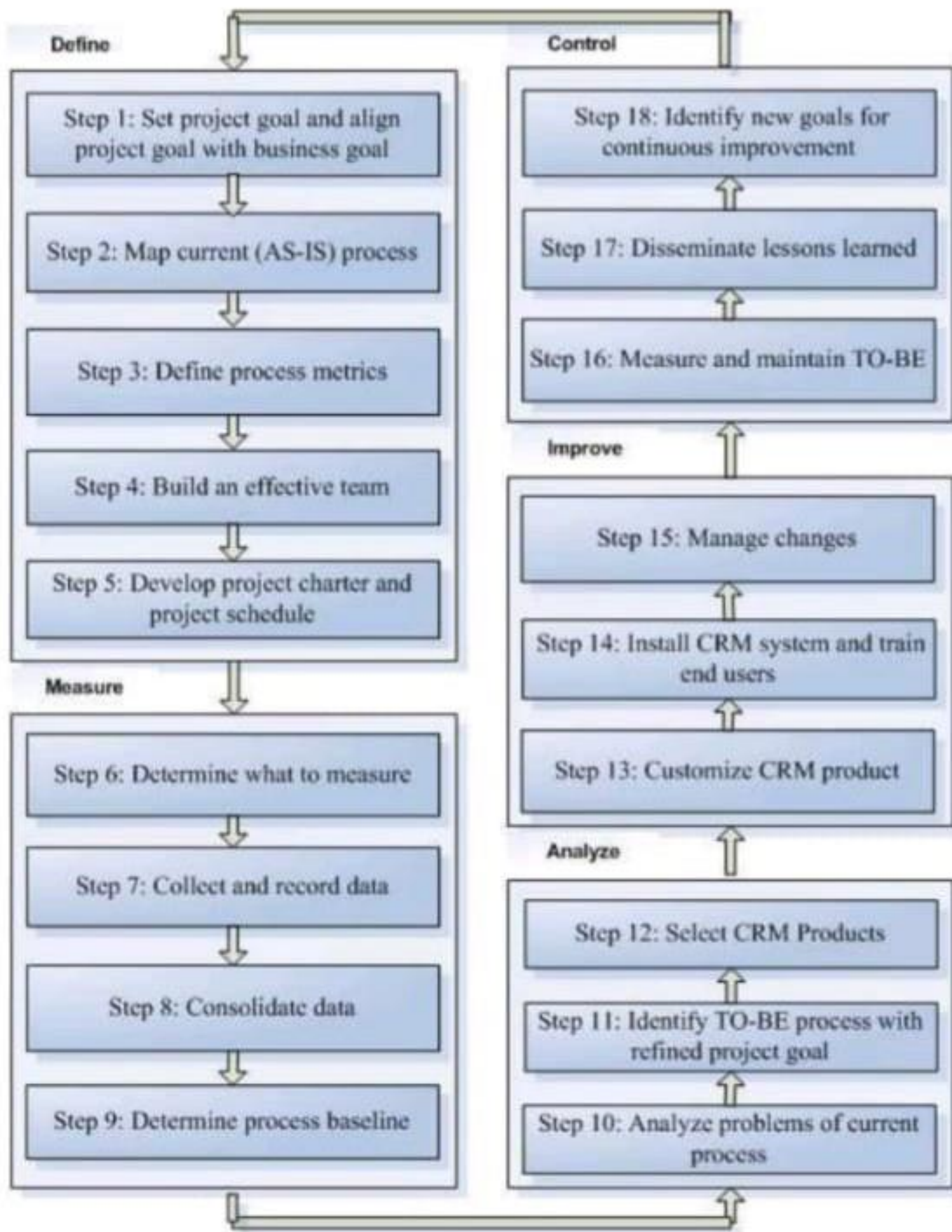
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

Share template feedback

Build empathy

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

2.2 Ideation & Brainstrom Map



3. Result 3.1 Data Model

Object Name	Fields in the Object		
School Details			
		Field Label	Data type
		Highest Marks	Text
Student Details			
		Field Label	Data type
		Phone Number	Text
		Results	Text

Parent Details		
	Field Label	Data type
	Parent Address	Text
	Parent Number	Text

3.2 Activity & Screenshot

➤ Account Details

Account | Salesforce

rdmcollege6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name
Account

Enable Reports

Custom

Track Activities

Singular Label
Account

Track Field History

Plural Label
Accounts

Deployment Status

Help Settings
Standard salesforce.com Help Window

https://rdmcollege6-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/Account/PageLayouts/view

Type here to search

18:35
19-04-2023

➤ Activity Details

Activity | Salesforce

rdmcollege6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Activity/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Activity

Details

Fields & Relationships

Buttons and Links

Object Limits

Search Layouts

List View Button Layout

Details

Description

API Name
Activity

Custom

Singular Label
Activity

Plural Label
Activities

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

https://rdmcollege6-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/Activity/FieldsAndRelationships/view



Users

Users | Salesforce

rdmcollege6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5i00000ch18heax.vey7h1iveqv@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	R. Sountharya	SR	soundaryaravi2001@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	R. Sountharya	sounth	sountharya21@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	R. Sountharya	sr	sounth21@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	intev	integration@00d5i00000ch18heax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5i00000ch18heax.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

https://rdmcollege6-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home

Type here to search

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➤ Reports

Reports | Salesforce

developer.salesforce.com

https://privatepvtld-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

school mangement students schools Dashboards parents Reports

Reports

Recent

2 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New parents Report		Private Reports	Kavithra Pandi	22/4/2023, 10:14 AM	
Created by Me	New students Report		Private Reports	Kavithra Pandi	22/4/2023, 9:56 AM	

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

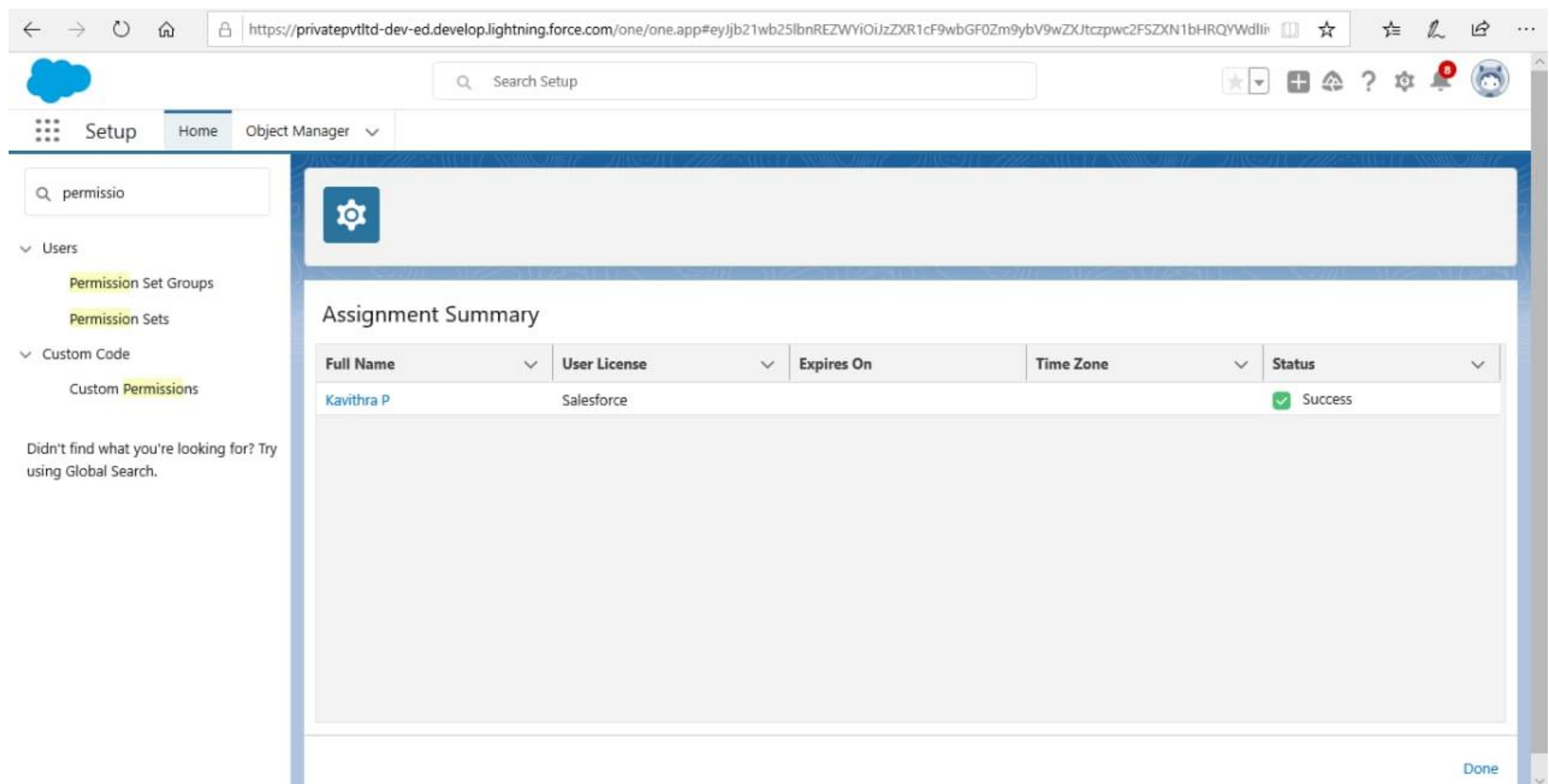
FAVORITES

All Favorites

Type here to search

10:30 22-04-2023

➤ Dashboard



4. Trailhead Profile Public URL

- Team Leader - <https://trailblazer.me/id/kavip48>
- Team Member 1 - <https://trailblazer.me/id/karaj90>

5. Advantages & Disadvantages

Advantages	Disadvantages
A CRM system can help automate the result tracking process, saving time and reducing the potential for errors.	Implementing a CRM system can be costly, especially for small organization with limited resources.
A CRM system can provide a centralized database for all candidate information, including internal marks, allowing for easy access and analysis of data.	Storing sensitive candidate information in a CRM system requires robust security measures to prevent unauthorized access.

6. Applications

- Educational institutions can use a CRM to track the performance of their students, manage their academic records, and communicate with them regarding their progress.
- Recruitment agencies can use a CRM to track the progress of job candidates, manage their resumes, and communicate with them regarding their interviews and job offers.

- Sales and marketing departments can use a CRM to track the performance of their leads and customers, manage their sales and marketing activities, and communicate with them regarding their needs and preferences.

7. Conclusion

Implementing a CRM (Customer Relationship Management) system for tracking candidate results with internal marks solution can provide numerous benefits for educational institutions, recruitment agencies, HR departments, sales and marketing teams, and other industries that require managing relationships with people.

By using a CRM, organizations can track and analyze candidate performance, manage their records, communicate with them regarding their progress, and improve their overall experience. With the help of a CRM, organizations can also streamline their processes, increase efficiency, and make data-driven decisions.

In conclusion, implementing a CRM system for result tracking of a candidate with internal marks can be a valuable investment for any organization that

wants to enhance its candidate management processes and improve its relationship with stakeholders.

8. Feature Scope

- Educational institutions can use a CRM to track the performance of their students, manage their academic records, and communicate with them regarding their progress.
- Recruitment agencies can use a CRM to track the progress of job candidates, manage their resumes, and communicate with them regarding their interviews and job offers.
- HR departments can use a CRM to track the performance of their employees, manage their employment records, and communicate with them regarding their career development.
- Sales and marketing departments can use a CRM to track the performance of their leads and customers, manage their sales and marketing activities, and communicate with them regarding their needs and preferences.

