

# **A CRM APPLICATION OF SCHOOLS AND COLLEGES**

## **INTRODUCTION**

### **Overview**

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. Additionally, by personalising communication and providing automated follow-up, educational organisation can build better relationships with students and leads, and keep them engaged over time.

### **Purpose**

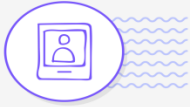
It helps schools and preschools in managing student data and Interactions, automate tasks related to recruitment and enrollment, and improve the efficiency of their recruitment and retention efforts. It can also help to increase the effectiveness of enrollment campaigns.

## **PROBLEM DEFINITION & DESIGN THINKING**

### **Empathy map**

Empathy mapping is tool that really helps you get to know your customers. By understanding what your customers think, feel, say and do

you can develop rich insight which helps you to identify genuine issues, problems or concerns that your customer may have right now.



## Empathy map

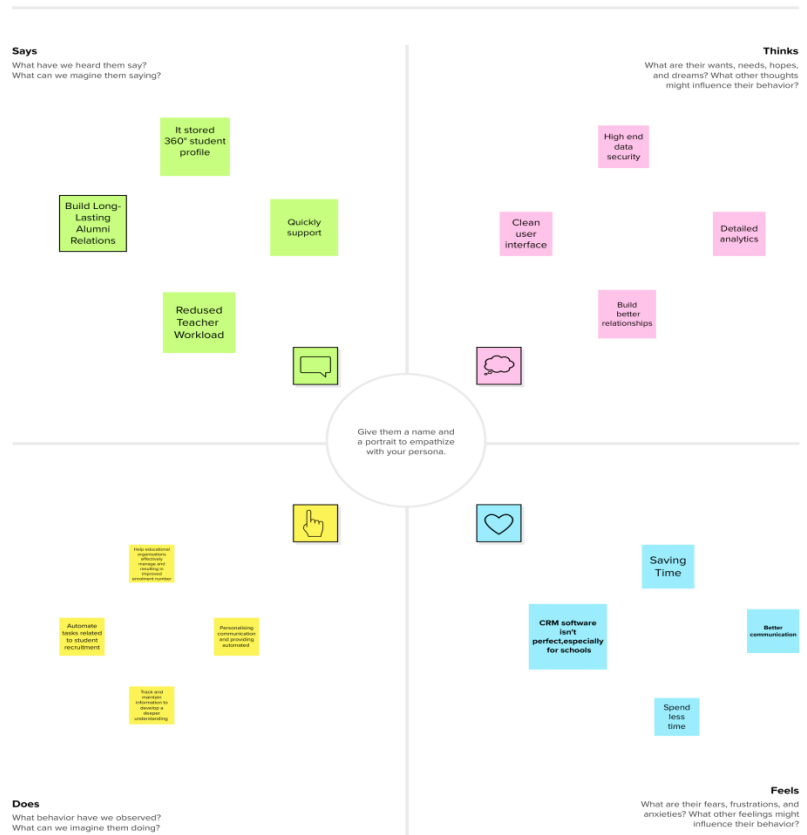
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



### Build empathy

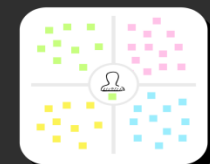
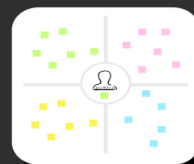
The information you add here should be representative of the observations and research you've done about your users.



### Need some inspiration?

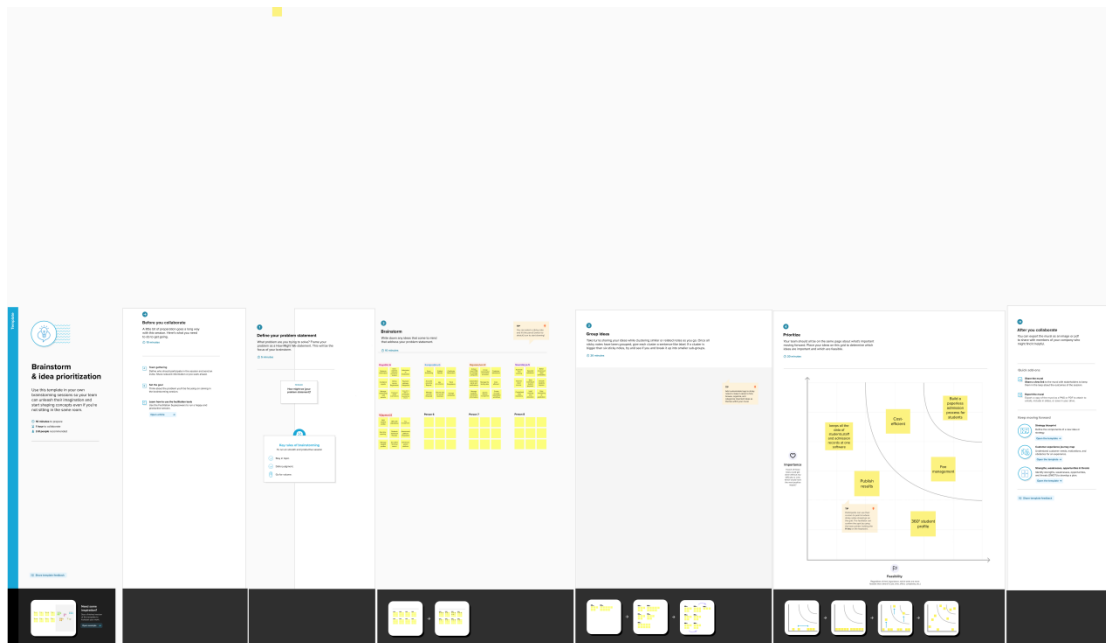
See a finished version of this template to kickstart your work.

[Open example](#)



# Ideation & Brainstorming Map

Ideation is often closely related to the practice of brainstorming, a specific technique that is utilized to generate new ideas. A principal difference between ideation and brainstorming is that ideation is commonly more thought of as being an individual pursuit, while brainstorming is almost always a group activity.



## RESULT

Data Model :

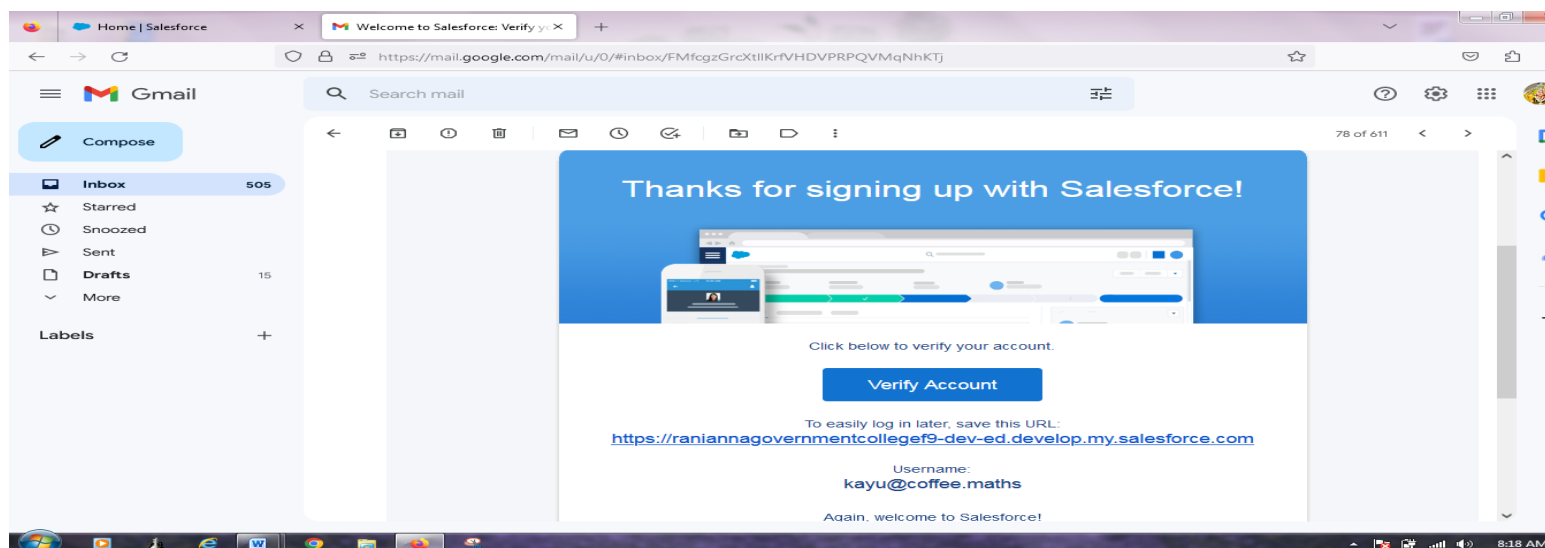
Object name	Field label	Data type
-------------	-------------	-----------

School object	<ul style="list-style-type: none"> <li>* Address</li> <li>* District</li> <li>* State</li> <li>* School</li> <li>* Number of students</li> <li>* Highest Marks</li> </ul>	<ul style="list-style-type: none"> <li>* Text Area</li> <li>* Text Area</li> <li>* Text Area</li> <li>* Text Area</li> <li>* Roll-up summary</li> <li>* Roll-up summary</li> </ul>
Student object	<ul style="list-style-type: none"> <li>* Phone Number</li> <li>* School</li> <li>* Results</li> <li>* Class</li> <li>* Marks</li> </ul>	<ul style="list-style-type: none"> <li>* Phone</li> <li>* Master-Detail Relationship</li> <li>* Pick list</li> <li>* Number</li> <li>* Number</li> </ul>
Parent object	<ul style="list-style-type: none"> <li>* Parent Address</li> <li>* Parent Number</li> </ul>	<ul style="list-style-type: none"> <li>* Text Area</li> <li>* Phone</li> </ul>

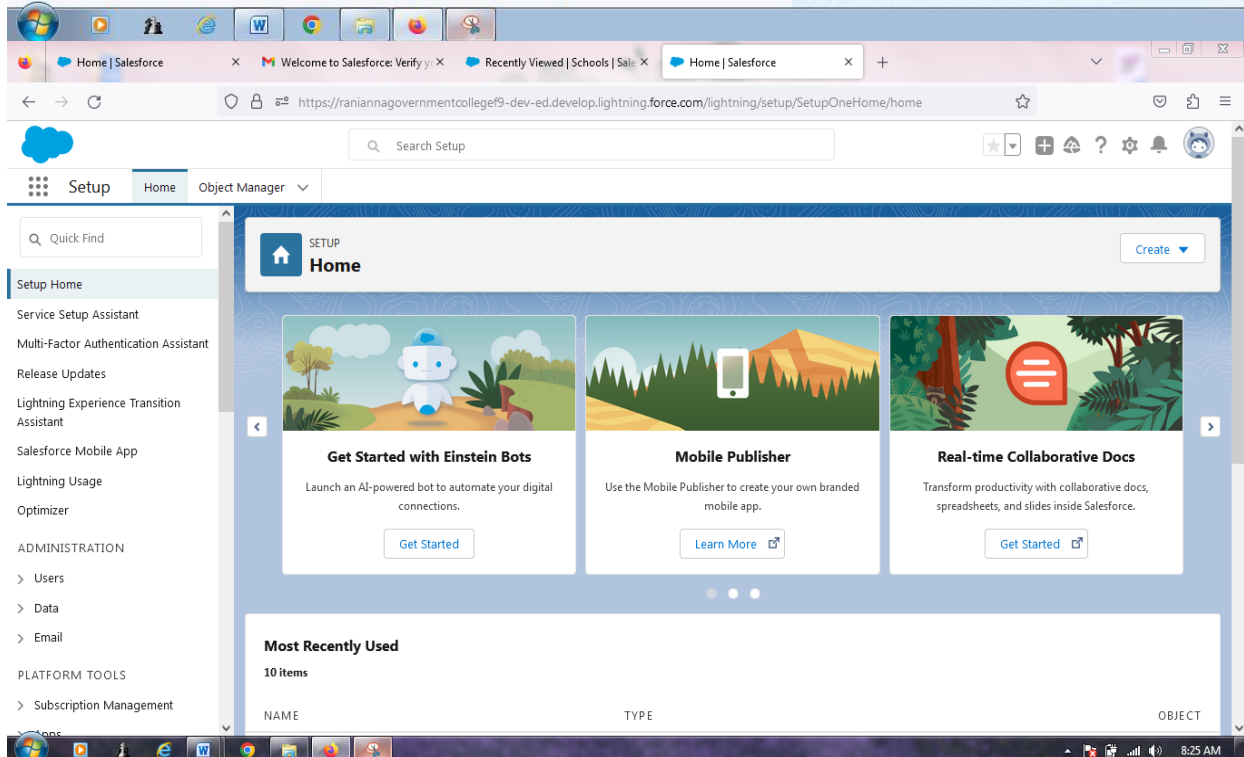
## Activity & Screenshots

### 1. Creating Developer Account

- Go to the mail inbox
- Click the verify account



- 



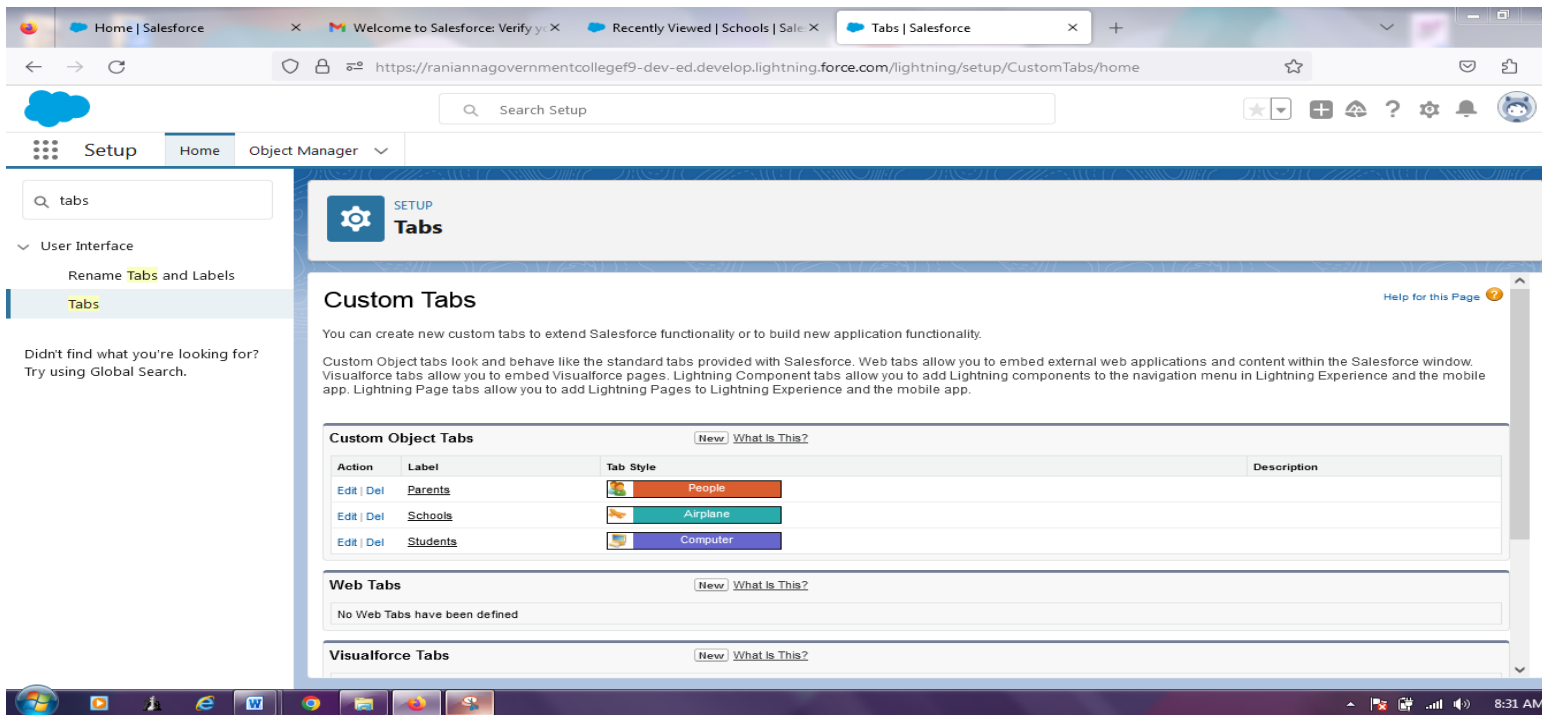
## 2.Object

- Now create school,students and parents object for school management
- And create custom tab for this three objects

The screenshot displays the Salesforce 'New Custom Object' setup page. The browser tabs at the top include 'Home | Salesforce', 'Welcome to Salesforce: Verify y...', 'Recently Viewed | Schools | Sale...', and 'New Custom Object | Salesforce'. The address bar shows the URL: <https://raniannagovernmentcollegef9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new>. The page header shows 'Setup' and 'Object Manager' tabs. The main content area is titled 'New Custom Object' and includes a 'Help for this Page' link. Below the title is a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section contains the following fields and examples:

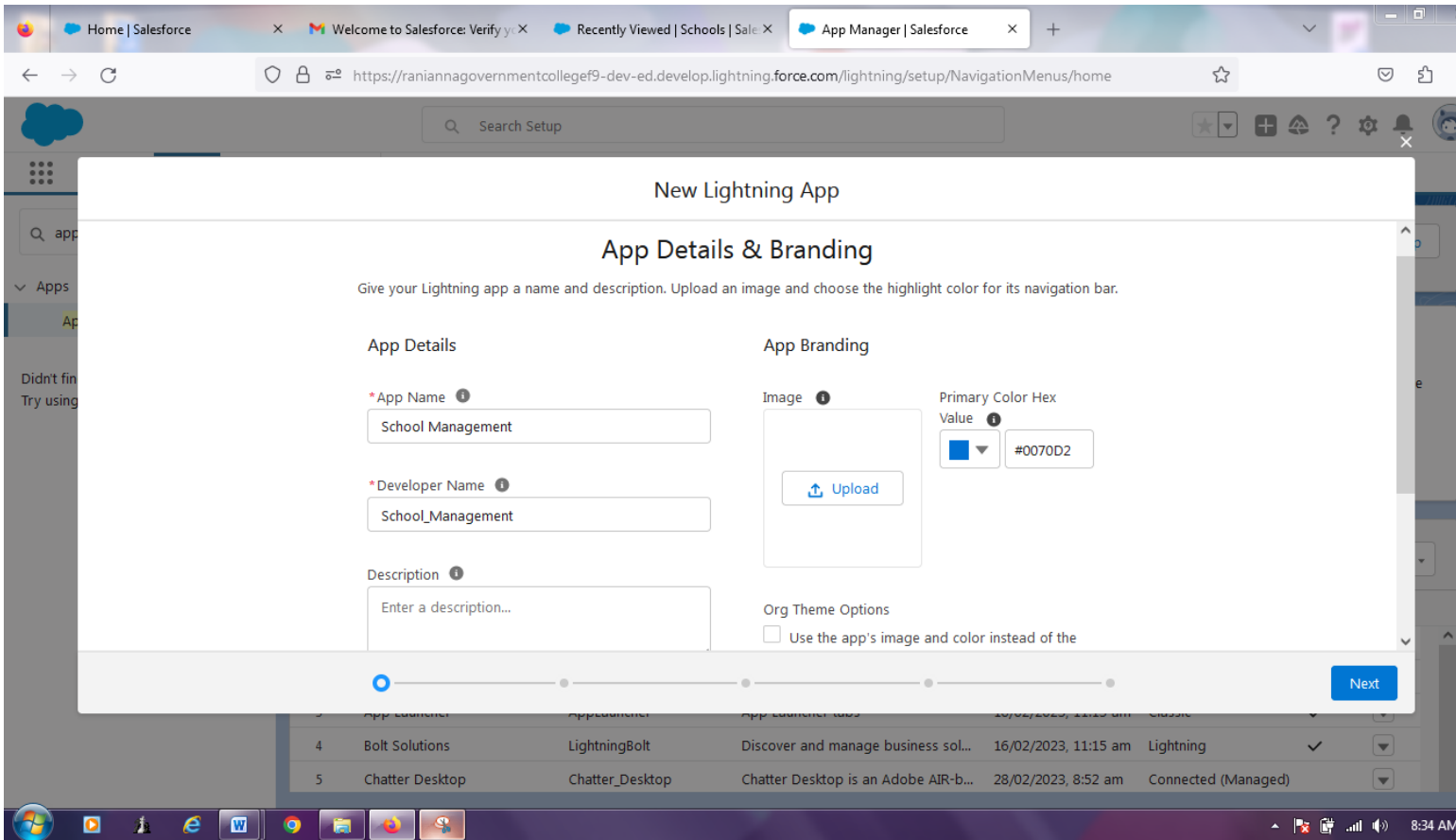
- Label:** School (Example: Account)
- Plural Label:** Schools (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** School (Example: Account)
- Description:** (Empty text area)

At the bottom of the page, there is a link to 'Open the standard Salesforce.com Help & Training window' and a system clock showing 8:28 AM.



### 3.Lightning App

- Create the school management app from this items Schools, Students, Parents, Reports and Dashboards and System Administrator from profiles



#### 4. Fields and Relationship

- Now creation of fields for the school objects
- From this field label ie., Address, District, State ,School websites, Number of students and Highest mark



Home | Salesforce x Welcome to Salesforce: Verify y x Recently Viewed | Schools | Sale x School | Salesforce x

https://raniannagovernmentcollegef9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003Sjmq/Fi

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
School

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

- ☐ Email
- ☐ Geolocation
- ☐ Number
- ☐ Percent
- ☐ Phone
- ☐ Picklist
- ☐ Picklist (Multi-Select)
- ☐ Text
- ☒ Text Area
- ☐ Text Area (Long)
- ☐ Text Area (Rich)
- ☐ Text (Encrypted)
- ☐ Time
- ☐ URL

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Home | Salesforce x Welcome to Salesforce: Verify y x Recently Viewed | Schools | Sale x School | Salesforce x

https://raniannagovernmentcollegef9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003Sjmq/Fi

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
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Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

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Object Limits

Record Types

Related Lookup Filters

Search Layouts

School

### New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label Address

Field Name Address

Description

Help Text

Required ☐ Always require a value in this field in order to save a record

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

- Similarly, Now creation of fields for the student objects
- From Phone number, Results, Class and Marks as the field label
- And also creation of fields for the parent objects
- From Parent address and Parent number as the field label

## 5.Profile

- Now create School profile, first from setup select profiles
- And go to Standard user then click clone
- Enter School profile as profile name then save and edit to give view all access permission
- And similarly create Parent profile

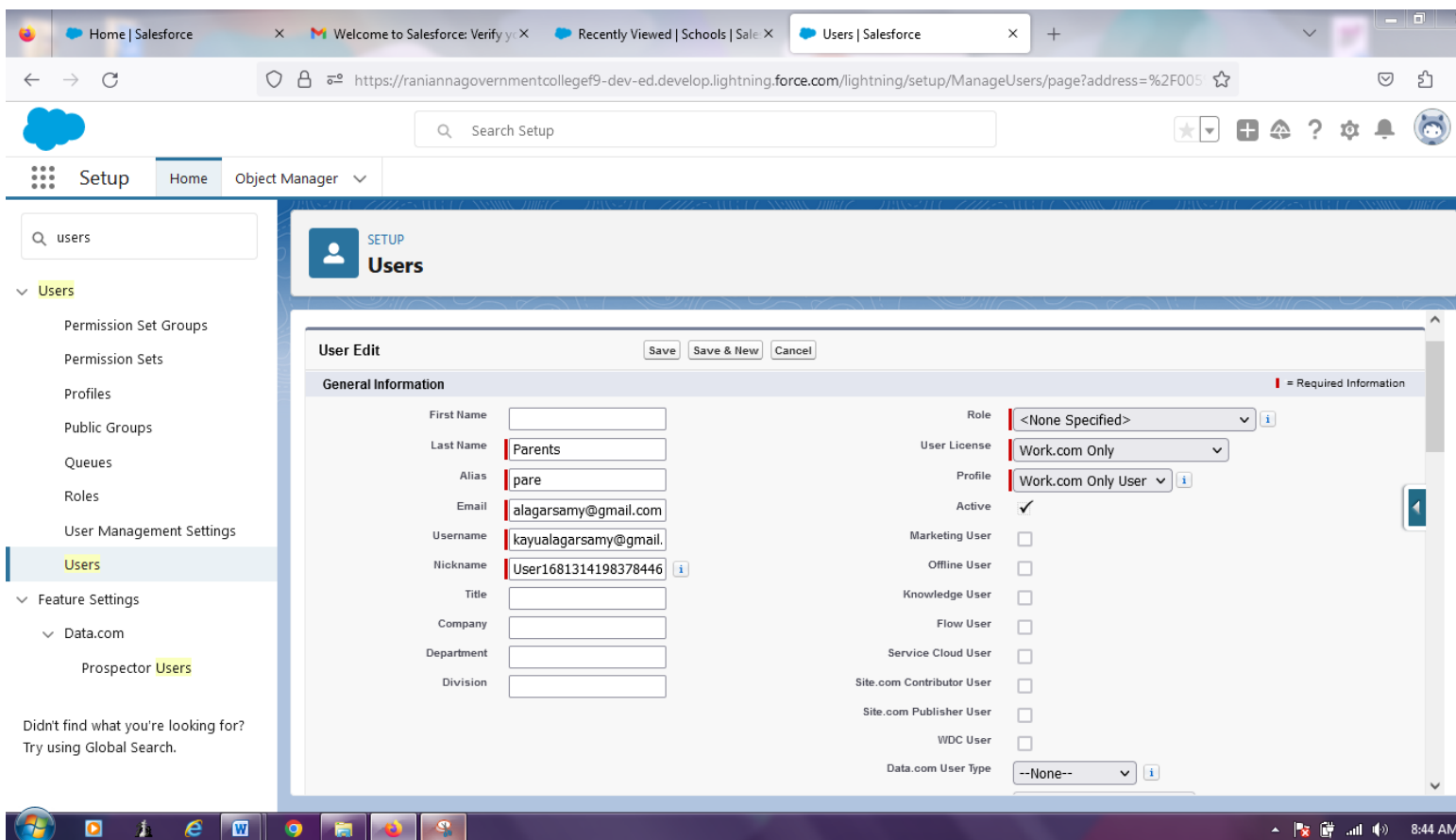
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'PROFI' and a list of 'Users' and 'Profiles'. The main content area is titled 'Clone Profile' and contains a form to create a new profile by cloning an existing one. The form has a message: 'You must select an existing profile to clone from.' Below this, there is a table with the following data:

Existing Profile	Standard User
User License	Salesforce
Profile Name	School profile

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The top of the browser window shows the URL: <https://raniannagovernmentcollegef9-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F>.

## 6.Users

- Creating a users
- From setup, select Users and click new user
- Create parents as a user's name
- Select a User License as salesforce and a profile as a school profile
- In the similar way create users as Teachers and Principals



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a search bar and a list of setup items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' item is selected. The main content area is titled 'User Edit' and contains a 'General Information' section. The fields in this section are: First Name (empty), Last Name (Parents), Alias (pare), Email (alagarsamy@gmail.com), Username (kayualagarsamy@gmail.com), Nickname (User1681314198378446), Title (empty), Company (empty), Department (empty), and Division (empty). The right side of the 'General Information' section contains: Role (<None Specified>), User License (Work.com Only), Profile (Work.com Only User), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), and Data.com User Type (--None--). The top of the browser window shows the URL: https://raniannagovernmentcollegef9-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005. The bottom of the browser window shows the Windows taskbar with the time 8:44 AM.

Home | Salesforce

Welcome to Salesforce: Verify your identity

Recently Viewed | Schools | Salesforce

Users | Salesforce

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

User Edit

Save Save & New Cancel

General Information

First Name

Last Name Parents

Alias pare

Email alagarsamy@gmail.com

Username kayualagarsamy@gmail.com

Nickname User1681314198378446

Title

Company

Department

Division

Role <None Specified>

User License Work.com Only

Profile Work.com Only User

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

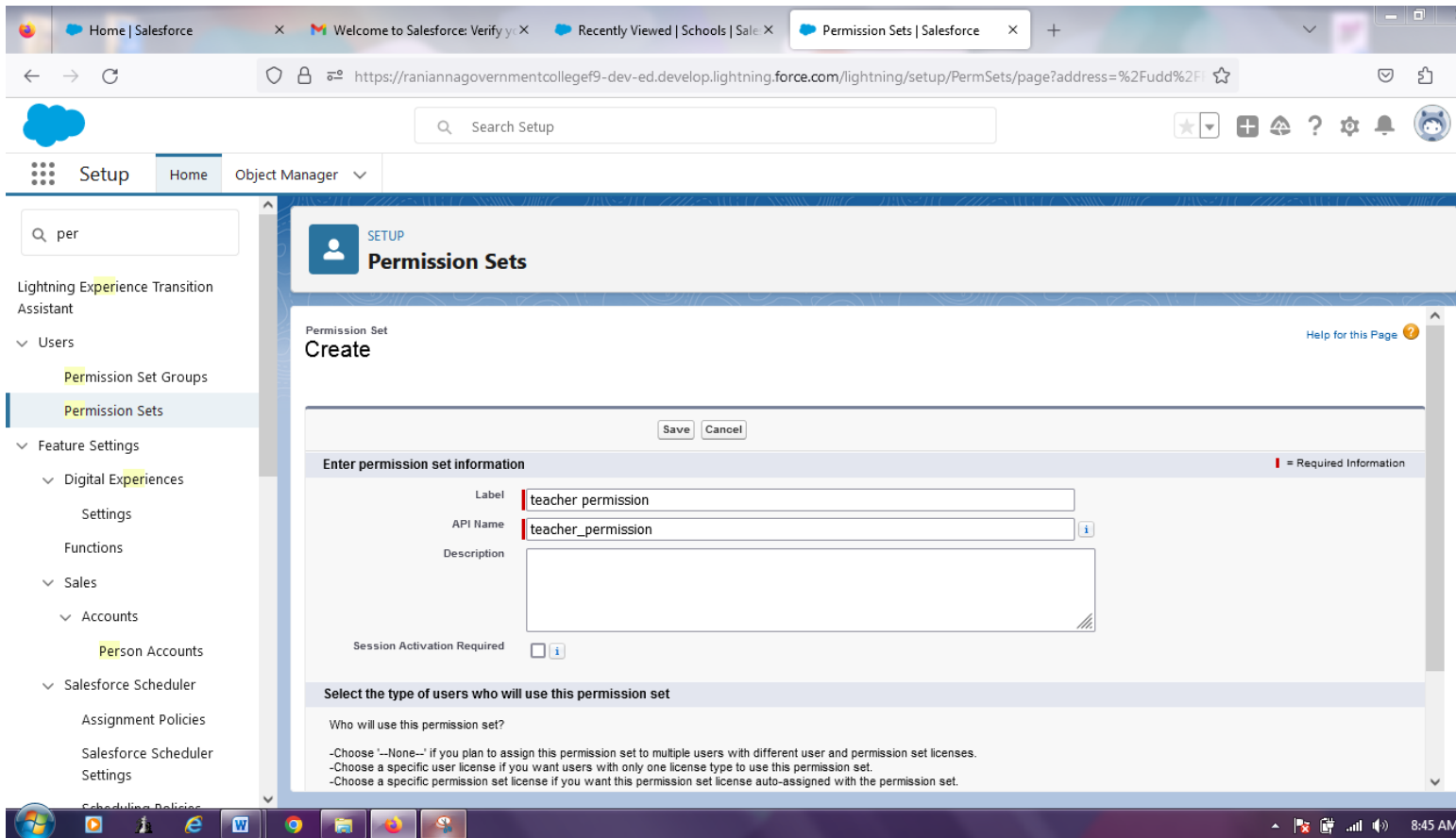
WDC User ☐

Data.com User Type --None--

8:44 AM

## 7. Permission sets

- Now create Teacher permission set
- From setup, select Permission sets and click new
- For the label, give teacher permission then save
- And give all permissions for custom objects
- In the similar way create Principal permission



## 8. Reports

- Now create Reports
- From the Reports tap ,click new Report
- Go to the Report type and select School with students and click start Report
- Then save
- Similarly create Parent Report

The screenshot displays the Salesforce Report Builder interface. The top navigation bar includes 'Home | Salesforce', 'Welcome to Salesforce: Verify...', 'Recently Viewed | Schools | Sale', and 'Report Builder | Salesforce'. The main navigation menu shows 'School Management', 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The 'Create Report' dialog is open, showing a search bar with 'school' and a table of report types. The 'Details' panel on the right shows the selected report type 'Schools with Students' and a 'Start Report' button.

Report Type Name	Category
Schools	Standard
Schools with Students	Standard

**Details**

**Schools with Students**  
Standard Report Type

**Start Report**

**Details** | **Fields**

**Created By You**

**Created By Others**

Home | Salesforce x Welcome to Salesforce: Verify yo x Recently Viewed | Schools | Sale x Reports | Salesforce x

https://raniannagovernmentcollegef9-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

School Management Schools Students Parents Reports Dashboards

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	Kayathri A	12/4/2023, 3:17 pm	
Created by Me	New Schools with Students Report		Private Reports	Kayathri A	12/4/2023, 3:16 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

## Trialhead Profile Puplic URL

Team Lead: <https://trailblazer.me/id/kayaa5>

Team Member 1: <https://trailblazer.me/id/kanig6>

Team Member 2: <https://trailblazer.me/id/rajar3>

Team Member 3: <https://trailblazer.me/id/souns15>

Team Member 4: <https://trailblazer.me/id/vijas52>

## ADVANTAGES &DISADVANTAGES

Advantage:

#### History of work with each student:

This is benefit of CRM in the education industry. We are accustomed to the fact that our desires are foreseen, and post-sales support is available at any time of the day. Implementing such processes is impossible without a CRM platform, because it has a separate card for each client with full information about the student. This data is presented in chronology, and you can view the entire history of work with the client in a couple of minutes.

Disadvantage:

One of the greatest challenges to CRM implementation is cost. There are dozens of software options available and many pricing plans that go with them. To work out the actual costs of CRM software, make sure that you consider the total cost of ownership including:

- software subscription or purchase fees
- premium upgrades, eg add-on marketing or reporting features
- customisation
- IT resources needed
- hardware or software requirements
- staff training and upskilling

Other factors such as data migration and quality, and converting business operations may also affect the total costs of CRM implementation. Proper

planning and careful assessment of any potentially hidden costs should help you set a realistic budget for your CRM project.

## **APPLICATIONS**

1. Application 1: Tracking Customers.
2. Application 2: Collecting Data for Marketing.
3. Application 3: Improving Interactions and Communications.
4. Application 4: Streamlining Internal Sales Processes.

## **CONCLUTION**

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

## **FUTURE SCOPE**

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.