

GOVERNMENT ARTS COLLEGE, OOTY**DEPARTMENT OF PHYSICS**

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A CRM Application for schools and college**1.INTRODUCTION****1.1 OVERVIEW**

A CRM System can help educational organisations effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalising communication and providing automated follow up, educational organisation can build better relationship with students and leads, and keep them engaged over time.

1.2 PURPOSE

CRM higher education technology enables institutions to manage relationships with all of their customers (including students, alumni, faculty, staff, and corporate partners) and connect insights from those interactions in a unified view.

2.PROBLEM DEFINITION & DESIGN THINKING**2.1 EMPATHY MAP**

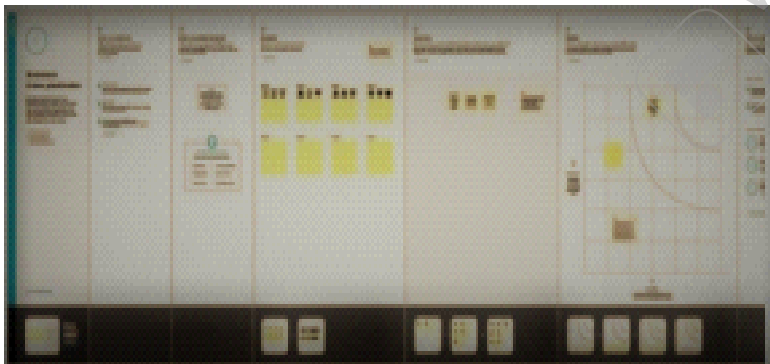
Empathy map

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.



Type here to search

2.2 IDEATION & BRAINSTORMING MAP



3. RESULT

3.1 DATA MODEL

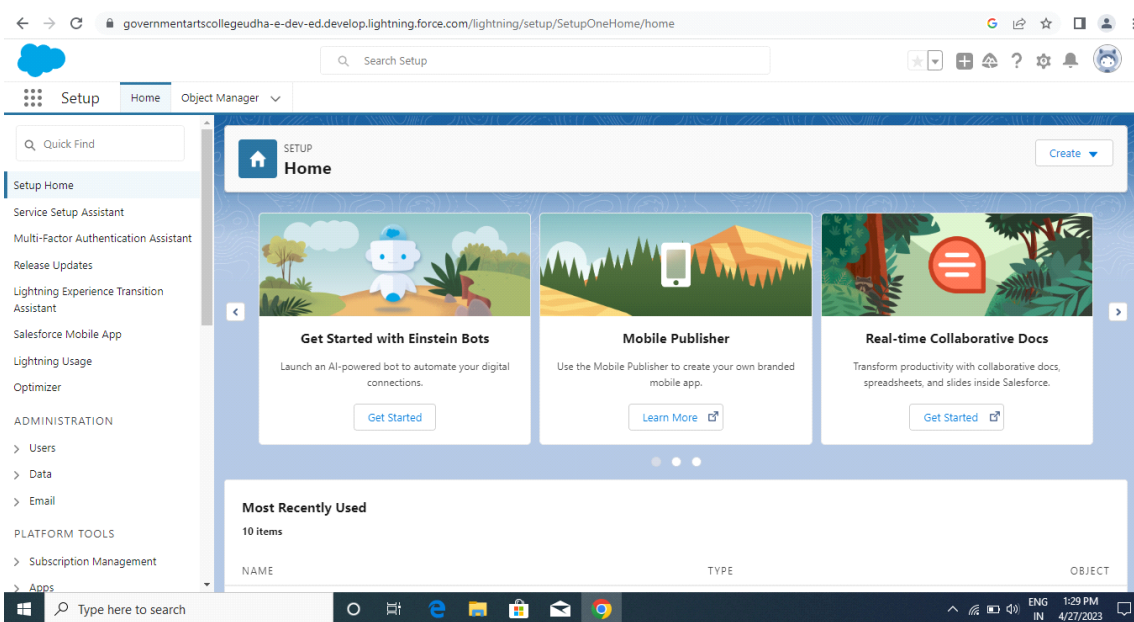
| OBJECT | FIELD IN THE | OBJECT |
|--------------|-----------------------|---------------------|
| | FIELD LABEL | DATA TYPE |
| 1. EVENTS | ENTER CITY | TEXT |
| 2. ATTENDEES | ID | AUTO NUMBER |
| | PHONE | PHONE |
| | EMAIL | EMAIL |
| | TICKET | PICKLIST |
| 3. SPEAKER | BIO | TEXT AREA |
| | EMAIL | EMAIL |
| 4. VENDORS | EMAIL | EMAIL |
| | PHONE | PHONE |
| | ENTER SRVICE PROVIDER | TEXT |
| | EVENTS NAME | LOOKUP RELATIONSHIP |

3.2 ACTIVITY & SCREENSHOTS:

MILESTON 1:Creation of developer account

Description:

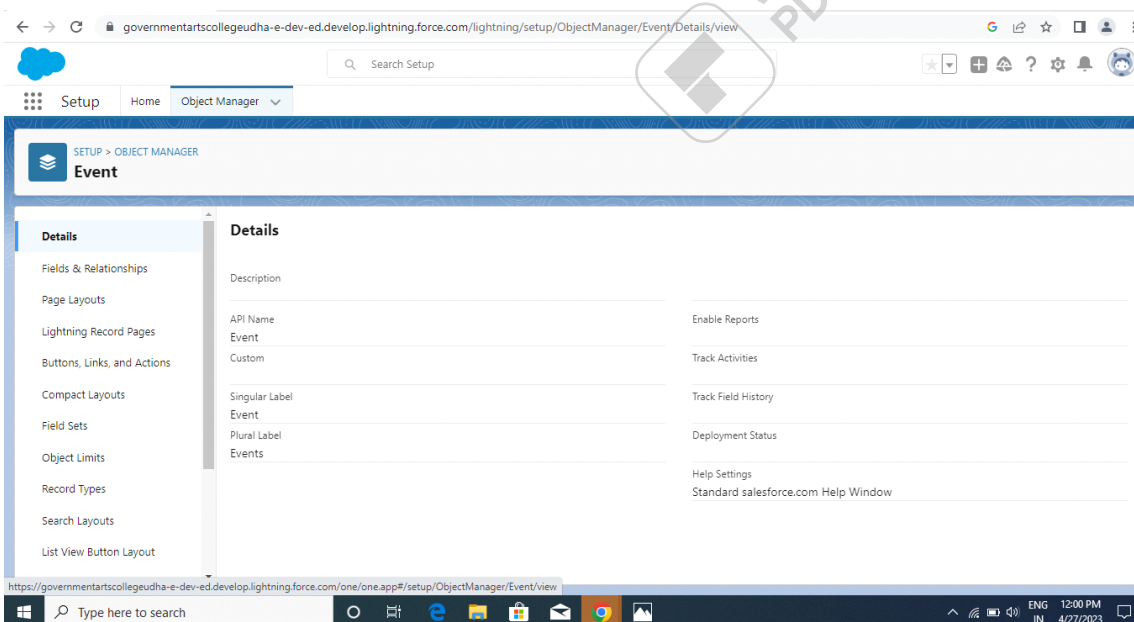
We had created a developer account and verified it for the salesforce project



Milestone 2: object

Description

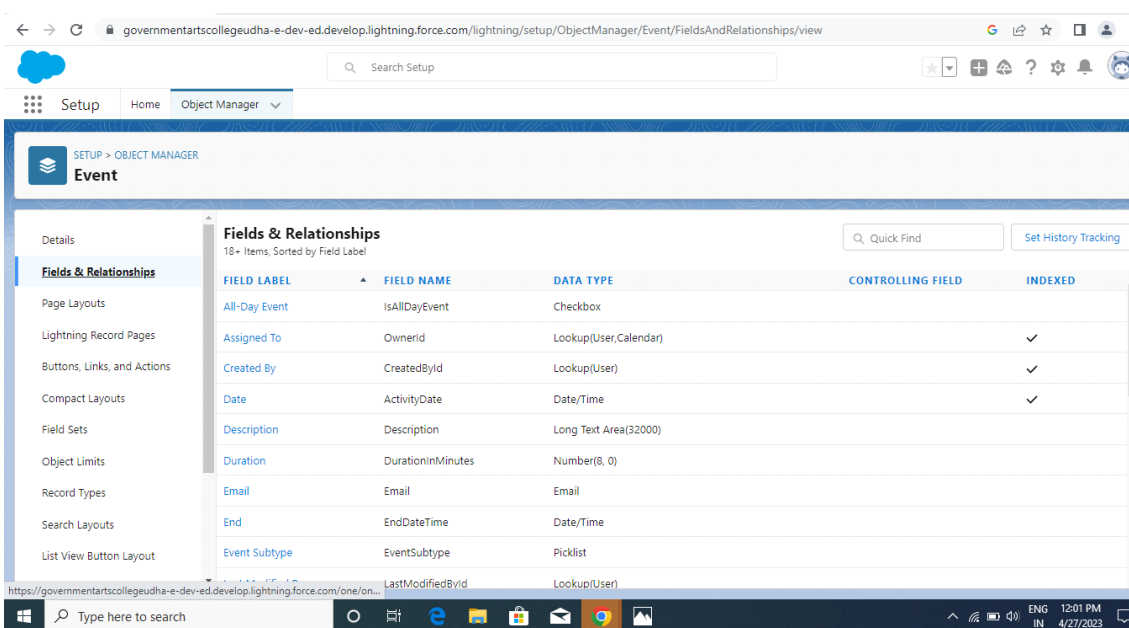
Create a custom object as event



Milestone 3: fields

Description

Create a custom field and create a entry city data as text



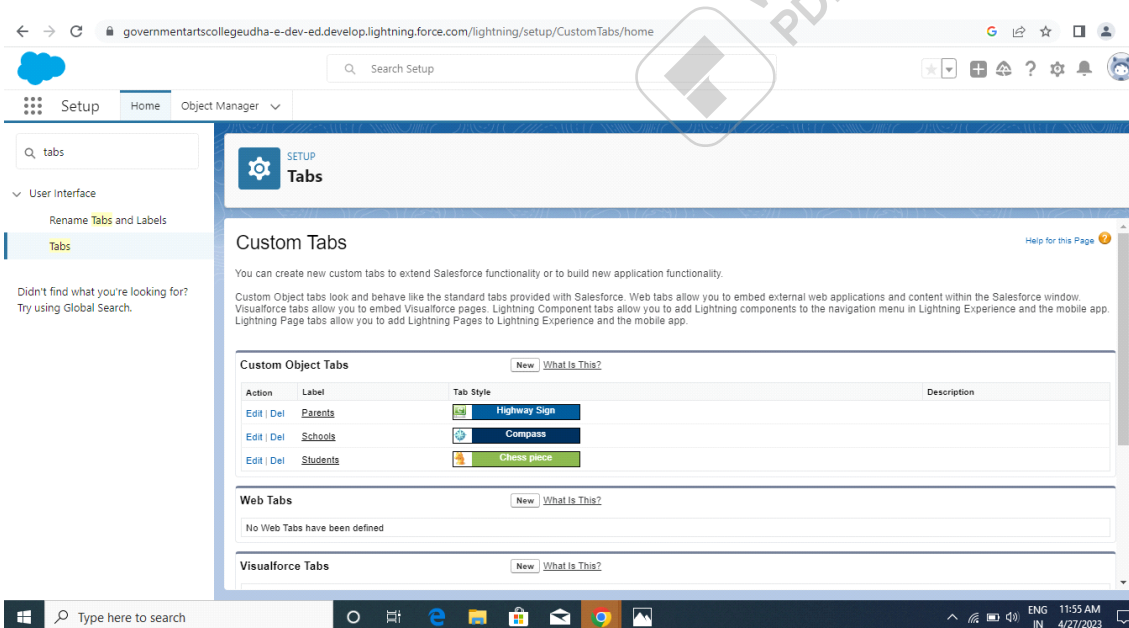
The screenshot shows the Salesforce Lightning Setup interface for the 'Event' object. The 'Fields & Relationships' section is active, displaying a list of 18 fields. The fields are sorted by Field Label. The table below lists the fields and their properties.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|-------------------|-----------------------|-------------------|---------|
| All-Day Event | IsAllDayEvent | Checkbox | | |
| Assigned To | OwnerId | Lookup(User,Calendar) | | ✓ |
| Created By | CreatedById | Lookup(User) | | ✓ |
| Date | ActivityDate | Date/Time | | ✓ |
| Description | Description | Long Text Area(32000) | | |
| Duration | DurationInMinutes | Number(8, 0) | | |
| Email | Email | Email | | |
| End | EndDateTime | Date/Time | | |
| Event Subtype | EventSubtype | Picklist | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |

Milestone 4: tabs

Description

Create a tabs for event



The screenshot shows the Salesforce Lightning Setup interface for 'Custom Tabs'. The 'Custom Object Tabs' section is active, displaying a table of custom tabs. The table below lists the custom tabs and their properties.

| Action | Label | Tab Style | Description |
|--|----------|--------------|-------------|
| Edit Del | Parents | Highway Sign | |
| Edit Del | Schools | Compass | |
| Edit Del | Students | Chess piece | |

The 'Web Tabs' section shows 'No Web Tabs have been defined'. The 'Visualforce Tabs' section is also empty.

Milestone 5:profile

Description

Create a custom profile for event

governmentartscollegeudha-e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

profile

Users

Profiles

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

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

| Action | Profile Name | User License | Custom |
|--|----------------------------------|----------------------------------|-------------------------------------|
| Edit Clone | Analytics Cloud Integration User | Analytics Cloud Integration User | <input type="checkbox"/> |
| Edit Clone | Analytics Cloud Security User | Analytics Cloud Integration User | <input type="checkbox"/> |
| Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| Edit Clone | Chatter External User | Chatter External | <input type="checkbox"/> |
| Edit Clone | Chatter Free User | Chatter Free | <input type="checkbox"/> |
| Edit Clone | Chatter Moderator User | Chatter Free | <input type="checkbox"/> |
| Edit Clone | Contract Manager | Salesforce | <input type="checkbox"/> |
| Edit Clone | Cross Org Data Proxy User | XOrg Proxy User | <input type="checkbox"/> |
| Edit Del ... | Custom_Marketing_Profile | Salesforce | <input checked="" type="checkbox"/> |
| Edit Del ... | Custom_Sales_Profile | Salesforce | <input checked="" type="checkbox"/> |

1-25 of 40 0 Selected

Page 1 of 2

Milestone 6: users

Description

Create a users

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

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

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

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|-----------------------------|---------|---|------|-------------------------------------|----------------------------------|
| Edit | Chatter Expert | Chatter | chatty.00d2w00000rjs1e4d_zamnaty54cy@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| Edit | P.Mageshvaraj P.Mageshvaraj | PPMa | mages@salesforce.com | | <input checked="" type="checkbox"/> | System Administrator |
| Edit | User_Integration | integ | integration@00d2w00000rjs1e4d.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Edit | User_Security | sec | insightssecurity@00d2w00000rjs1e4d.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

New User Reset Password(s) Add Multiple Users

Mileston :7 permission set

Description

Create a permission set for event

The screenshot shows the Salesforce 'Permission Sets' setup page. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a search bar, a 'Help for this Page' link, and a 'All Permission Sets' dropdown. Below this is a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table lists various permission sets like 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', and 'Facility Manager'. The bottom of the page shows a Windows taskbar with the date 4/27/2023 and time 11:38 AM.

| Action | Permission Set Label | Description | License |
|--------------------------|----------------------------|---|---|
| <input type="checkbox"/> | Buyer | Allows access to the store. Lets users see products and c... | B2B Buyer Permission Set One Seat |
| <input type="checkbox"/> | Buyer Manager | Includes all Buyer capabilities, and allows access to mana... | B2B Buyer Manager Permission Set One Seat |
| <input type="checkbox"/> | CRM User | Denotes that the user is a Sales Cloud or Service Cloud u... | CRM User |
| <input type="checkbox"/> | Commerce Admin | Allow access to commerce admin features. | Commerce Admin Permission Set License Seats |
| <input type="checkbox"/> | Contact Center Admin | Manage Service Cloud Voice contact centers that use Am... | Service Cloud Voice User |
| <input type="checkbox"/> | Contact Center Agent | Access agent features in Service Cloud Voice contact cent... | Service Cloud Voice User |
| <input type="checkbox"/> | Contact Center Supervisor | Access supervisor features in Service Cloud Voice contact... | Service Cloud Voice User |
| <input type="checkbox"/> | Experience Profile Manager | | Salesforce |
| <input type="checkbox"/> | Facility Manager | Lets users create, read, edit, and delete locations, subloca... | Facility Manager |

Milestone 8: reports

Description

Create a report using object event, attendees, speaker and vendors

The screenshot shows the Salesforce 'Reports' page. The left sidebar contains navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The main content area is titled 'Reports' and includes a search bar, a 'New Report' button, and a 'New Folder' button. Below this is a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists three reports: 'New Parents Report', 'New Students Report', and 'New Schools Report'. The bottom of the page shows a Windows taskbar with the date 4/27/2023 and time 2:09 PM.

| Report Name | Description | Folder | Created By | Created On | Subscribed |
|---------------------|-------------|-----------------|---------------------------|---------------------|------------|
| New Parents Report | | Private Reports | P.Mageshwari P.Mageshwari | 10/3/2023, 12:08 pm | |
| New Students Report | | Private Reports | P.Mageshwari P.Mageshwari | 10/3/2023, 12:04 pm | |
| New Schools Report | | Private Reports | P.Mageshwari P.Mageshwari | 10/3/2023, 12:02 pm | |

4 TRAILHEAD PROFILE URL:

Team lead(Reeta.K):

Team member 1(Mageshwari.P):

Team member 2(Sharmila.I):

Team member 3(Thilagavathi.C):

Team member 4(Thangamani.V):

5.1 ADVANTAGES OF CRM APPLICATION FOR SCHOOLS AND COLLEGE

One of the main benefits of using CRM in education is that automation and standardized online learning processes reduce costs by eliminating a lot of routine and manual steps.

But if during the implementation of CRM the number of routine operations in the company's business processes does not decrease, then the implementation plan requires revision.

The conversion can increase up to four times. According to IBM, every dollar invested in CRM implementation brings the company five dollars in profit. This alone clearly demonstrates the importance of using this system. Below we will share the main benefits of CRM for higher education.

The use of automation tools helps in the control and management of employees. With the help of CRM for university technologies, you can get data on the effectiveness of each of your teachers and students.

All necessary information about the customer is collected and stored in a database that is available to all employees of the sales department. Thus, it is much easier to meet the client's needs without getting on the client's precious nerves while communicating with the sellers

This is another 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.

5.2 DISADVANTAGES OF CRM APPLICATIONS FOR SCHOOLS AND COLLEGE

A CRM software is not a small investment by any means. The price of the software itself can be quite high, and then you have to factor in the cost of integration, data migration, training, and support. Not every business can afford to make this kind of investment, and even if they can, there's no guarantee that the return on investment will be worth it.

A lot of CRM systems are not user-friendly and can be quite frustrating to use. This can lead to a lot of wasted time and energy trying to get the system to do what you want it to do. If a CRM is difficult to use, people are going to avoid using it, which defeats the whole purpose of having one in the first place.

One of the main concerns that people have about using a CRM system is the security of their data. With so much personal and financial information being stored in one place, it's understandable why people would be worried about data security. Unfortunately, not all CRM systems are created equal in this regard, and some are more secure than others. If data security is a major concern for your business, you need to do your research before selecting a CRM system.

APPLICATION

A CRM system can help educational organisations effectively manage and track leads, resulting in improved enrolment numbers. 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.

CONCLUSION

Despite the disadvantages listed above, there are plenty of benefits to using a CRM system in your business. By choosing the right CRM system and taking the time to learn how to use it effectively, you can maximize the benefits that it has to offer.

These were the advantages and disadvantages of CRM program and when analyzed the advantages and disadvantages, the advantages outweighs the disadvantages! This means that ultimately a CRM would be very beneficial for a business.

But there's a catch, the business needs to choose the right CRM solution and the right CRM strategy to see the endless advantages that a CRM provides.

FUTURE SCOPE

Capture and manage your leads on a single platform

A prospective student might register a lead through email, social media, website, publishers, agencies, ads or simply, by walking in. The very first way in which an education CRM helps you is by centralising all your incoming leads across channels in one place.

A CRM centralises donor and alumni information and is used to send out automated communications at key times of the year to keep everyone updated on the success of

the institution's programmes and students.

These days, numerous small and medium-sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement CRM software. However, the preferences and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.

Moreover, the companies didn't have the expertise to manage the CRM software inhouse. Hence, they were bound to hire designated technicians. These technicians used to charge a lump sum amount in exchange for their services. As a result, the cost used to be the most discouraging factor for small and medium enterprises.

If we notice today's scenario, then the CRM software has become quite affordable. Even many developers are providing CRM software for free. Since most CRMs are web-based software, the up-gradation of infrastructure does not become necessary. Hence, it is a great way to save your expenses.

THANK YOU

