

School / College Student CRM

A **School / College Student CRM** in Salesforce is a **real-world project** that mimics how educational institutions manage admissions, classes, results, and communication with parents. Let me break it into a **step-by-step implementation guide** for you.

◆ Step 1: Define Custom Objects

You'll need to create these custom objects in Salesforce:

1. **Student**
 - Fields: Name, Roll No, DOB, Address, Email, Phone, Parent Name, Parent Contact.
 2. **Course / Class**
 - Fields: Course Name, Code, Faculty, Duration, Credits.
 3. **Enrollment** (junction object between Student & Course)
 - Fields: Enrollment Date, Status (Active, Completed, Dropped).
 4. **Grade / Exam Result**
 - Fields: Subject, Marks, Grade, Student Lookup, Course Lookup.
 5. **Fee**
 - Fields: Fee Type (Tuition, Exam, Hostel), Amount, Due Date, Status (Paid / Pending).
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◆ Step 2: Relationships

- **Student ↔ Course:** Many-to-Many via **Enrollment**.
- **Student ↔ Grade:** Lookup.
- **Student ↔ Fee:** Lookup.
- **Course ↔ Grade:** Lookup.

This allows a student to have multiple courses, multiple grades, and multiple fee records.

◆ Step 3: Parent Portal

- Use **Salesforce Experience Cloud (Community)** to build a **Parent Portal**.
 - Parents can log in and view:
 - ✓ Student Profile (basic details)
 - ✓ Grades (marks, GPA)
 - ✓ Attendance (if you extend the model)
 - ✓ Fee Status (Paid / Pending)
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◆ Step 4: Automations

1. **Fee Reminder (Automation)**
 - Use **Flow Builder**:
 - Scheduled Flow that checks Fee Due Date.
 - If *Status = Pending* and *Due Date is near*, send an email/SMS reminder to parents.
 2. **Admission Automation**
 - When a new student record is created, auto-assign a default “Admission Pending” status.
 - Send a welcome email.
 3. **Grade Automation**
 - When a Grade record is inserted, auto-calculate GPA and update in Student Profile.
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◆ Step 5: Reports & Dashboards

- **Admissions Report** → How many students admitted this year.
 - **Course Enrollment Report** → Students per course.
 - **Fee Collection Dashboard** → Paid vs Pending fees.
 - **Student Performance Report** → Top-performing students, average GPA by class.
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◆ Step 6: Optional Advanced Features

- **Mobile Access**: Parents can use Salesforce mobile app to check updates.
- **Einstein Analytics / AI**: Predict students at risk (low grades + unpaid fees).
- **WhatsApp Integration**: Send fee reminders directly via WhatsApp.