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.

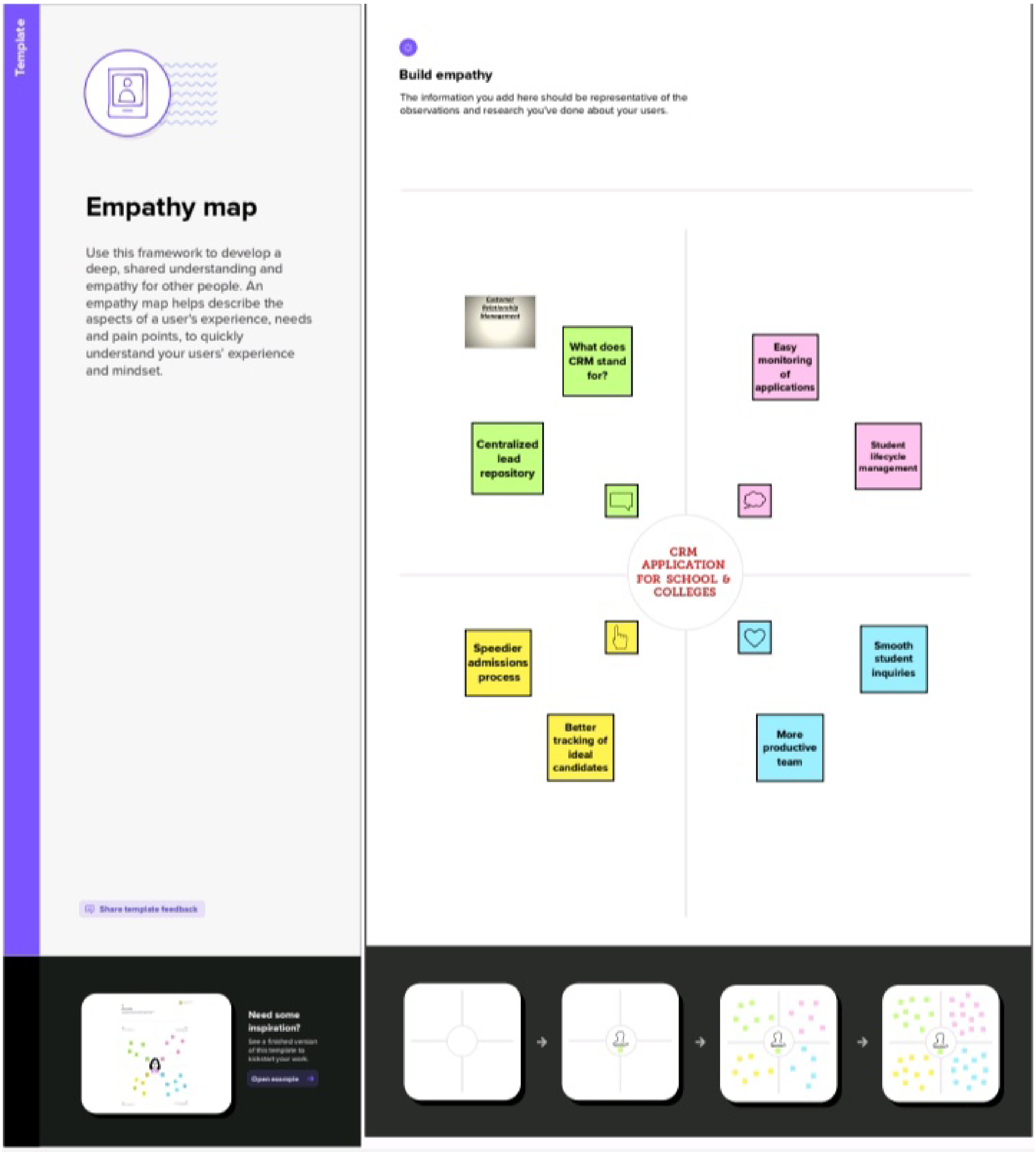
1.2 Purpose

- 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

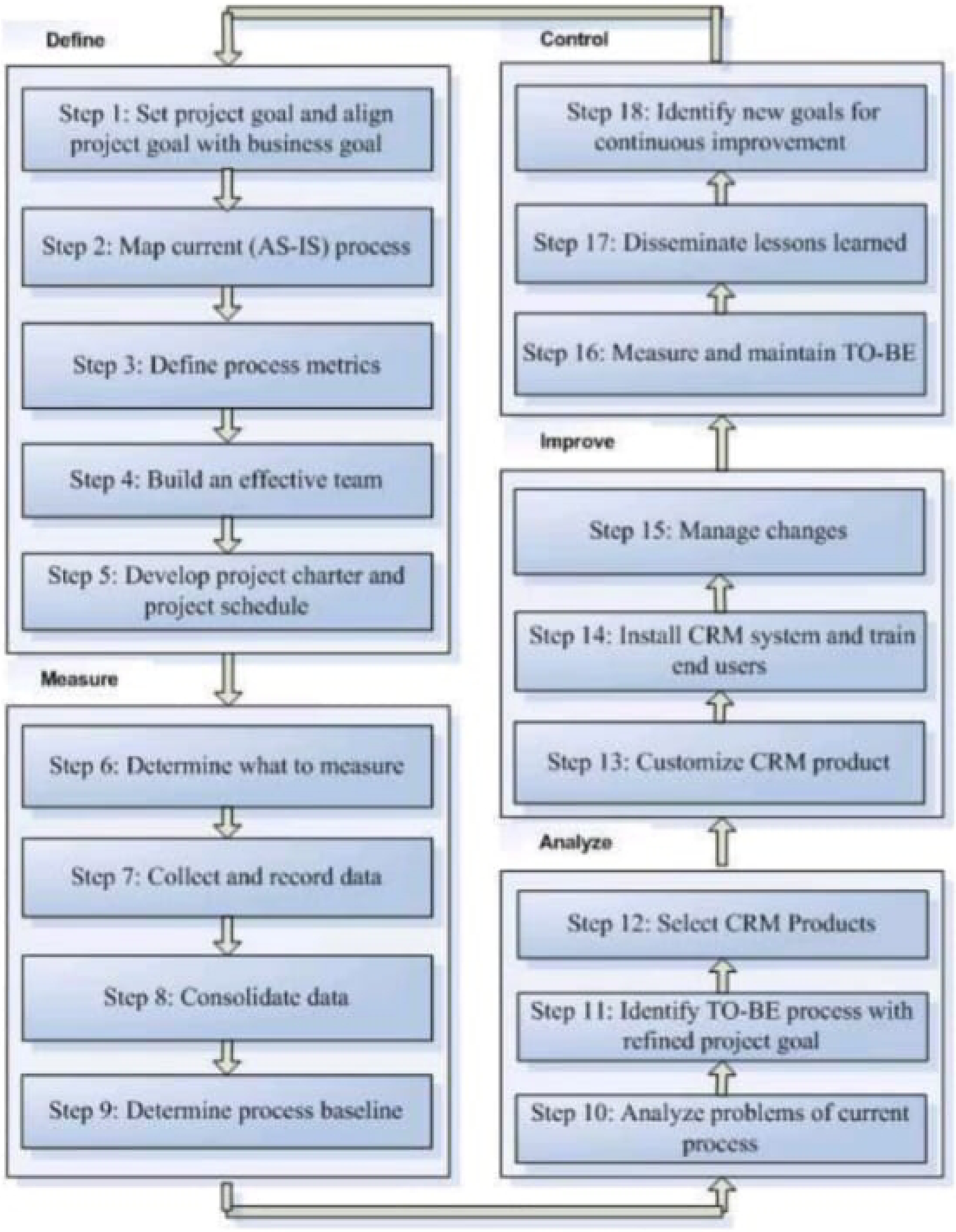
customer relationship management system solves this problem easily.

2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorm Map



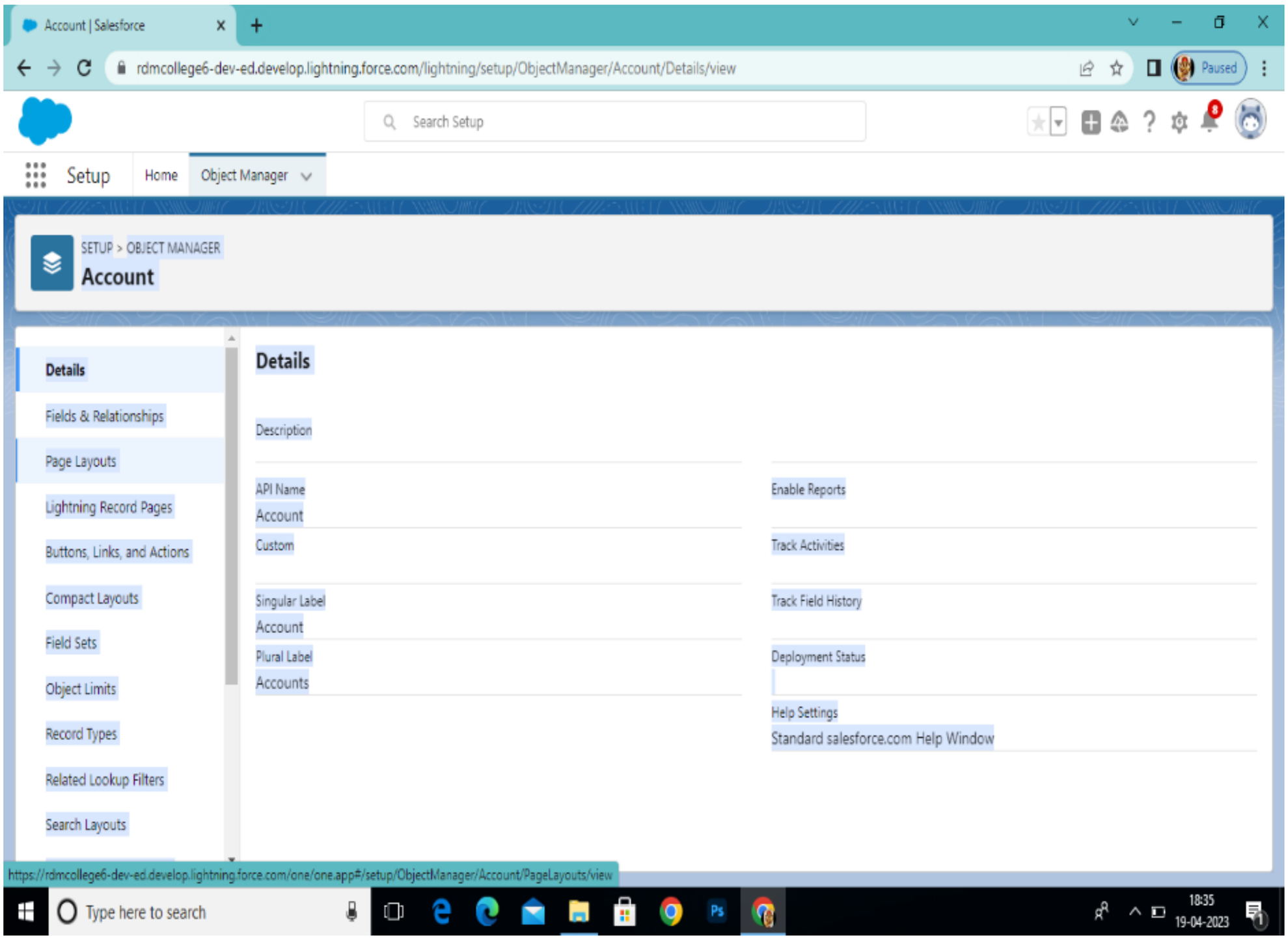
3. Result

3.1 Data Model

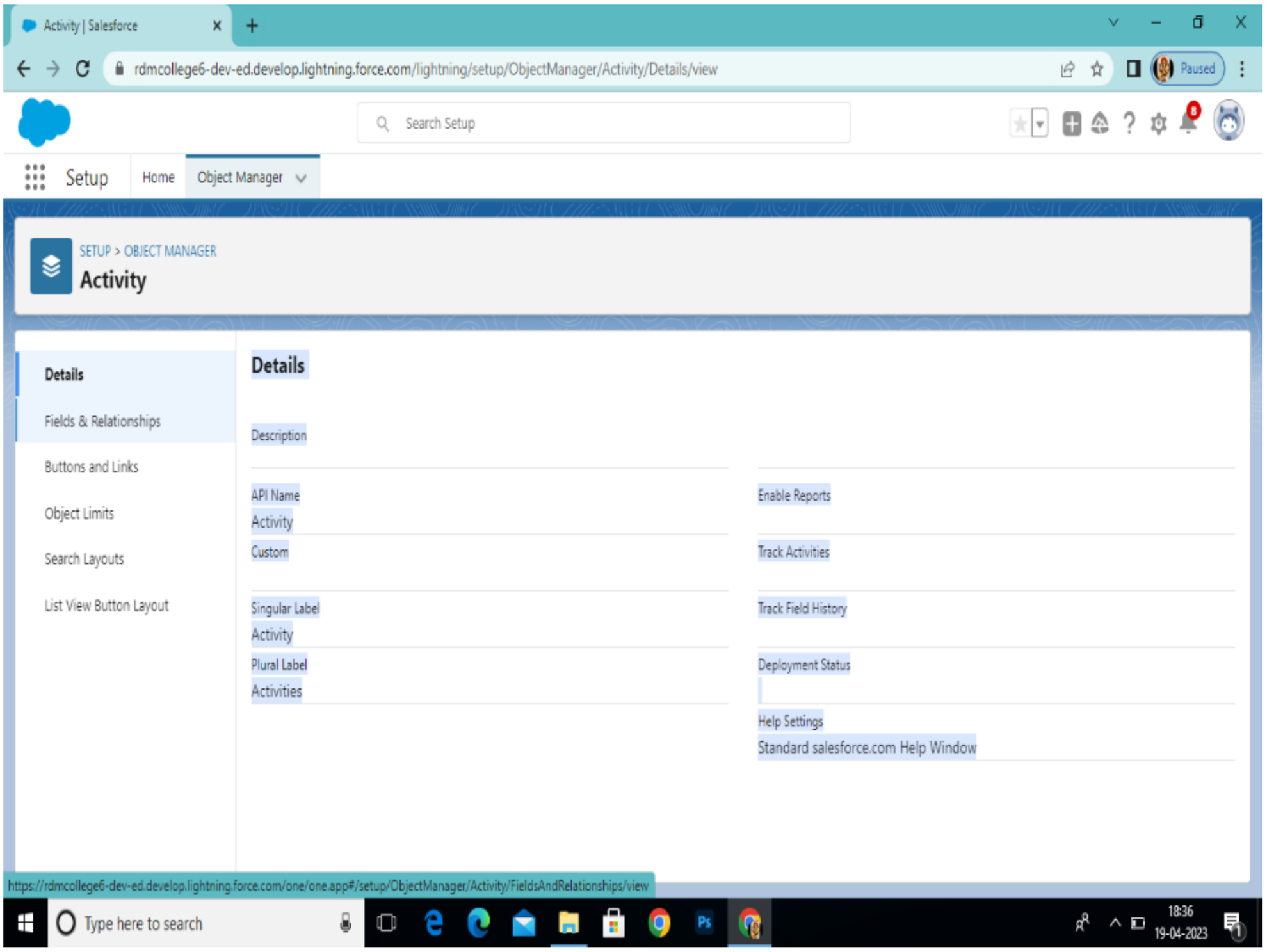
<table>
<tr><th>Object Name</th><th>Fields in the Object</th></tr>
<tr><td>School Details</td><td><table><tr><th>Field Label</th><th>Data type</th></tr><tr><td>Highest Marks</td><td>Text</td></tr></table></td></tr>
<tr><td>Student Details</td><td><table><tr><th>Field Label</th><th>Data type</th></tr><tr><td>Phone Number</td><td>Text</td></tr><tr><td>Results</td><td>Text</td></tr></table></td></tr>
<tr><td>Parent Details</td><td><table><tr><th>Field Label</th><th>Data type</th></tr><tr><td>Parent Address</td><td>Text</td></tr><tr><td>Parent Number</td><td>Text</td></tr></table></td></tr>
</table>

3.2 Activity & Screenshot

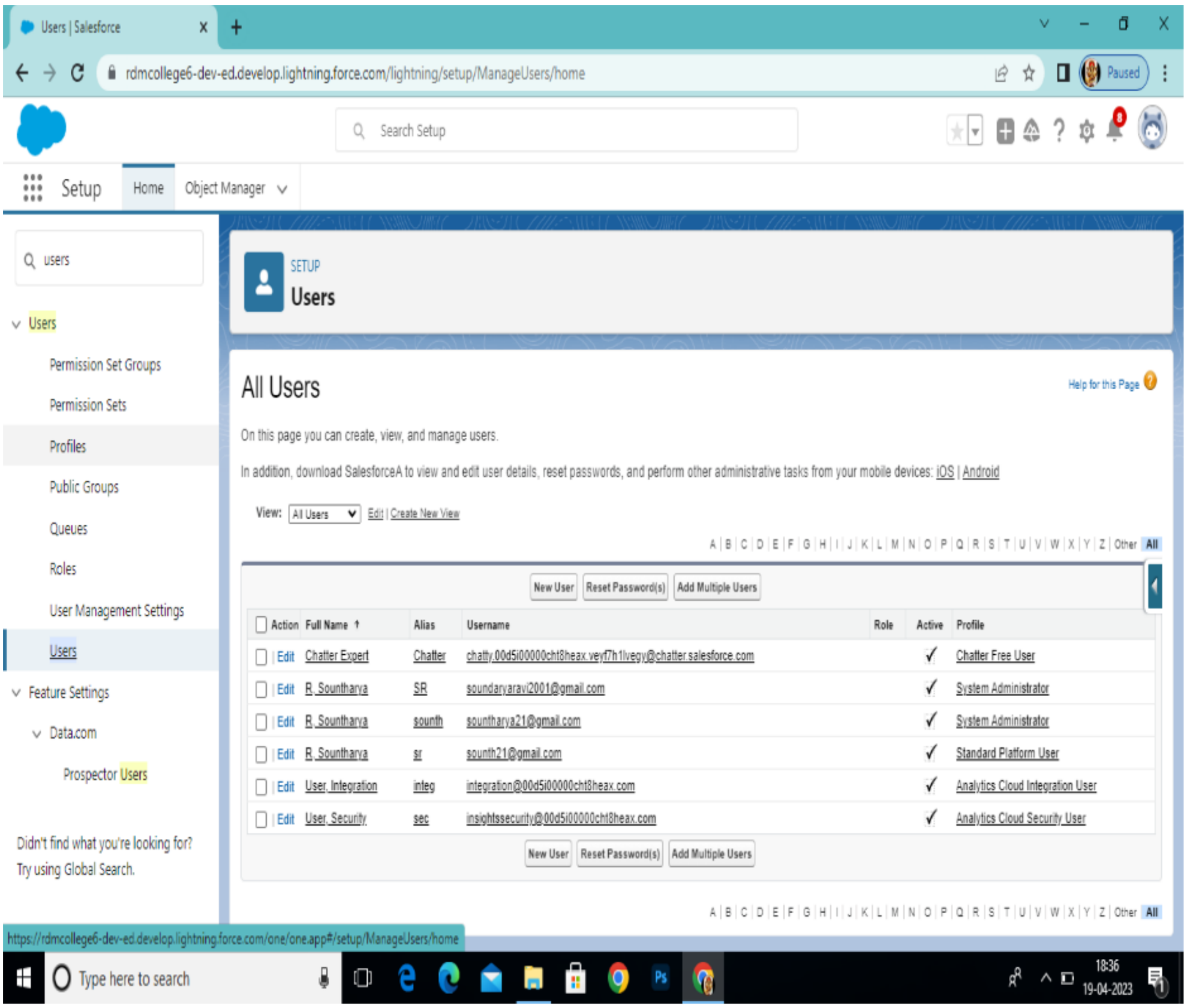
- Account Details



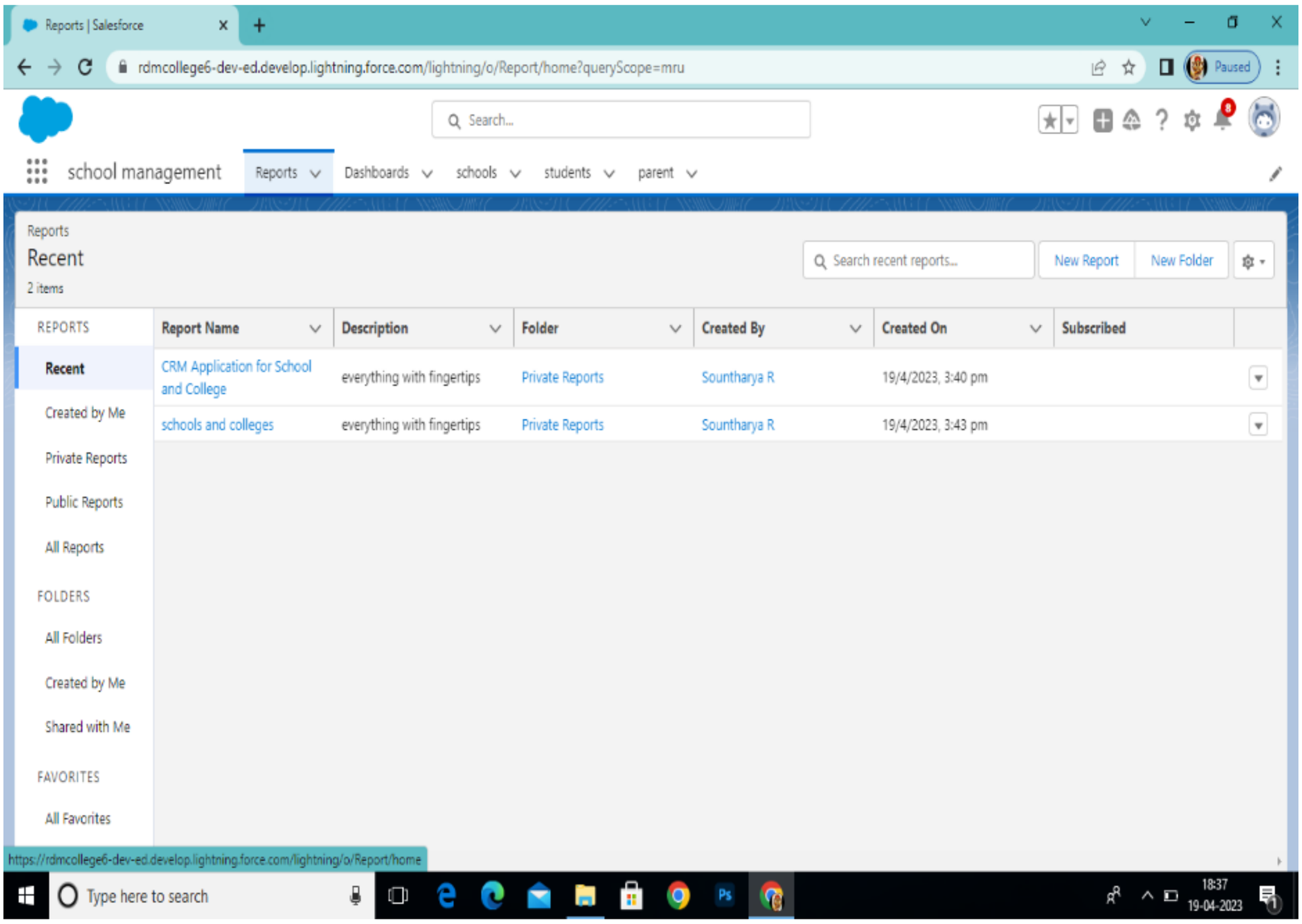
- Activity Details


Activity | Salesforce
rdmcollege6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Activity/Details/view
Paused
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
Type here to search
18:36
19-04-2023

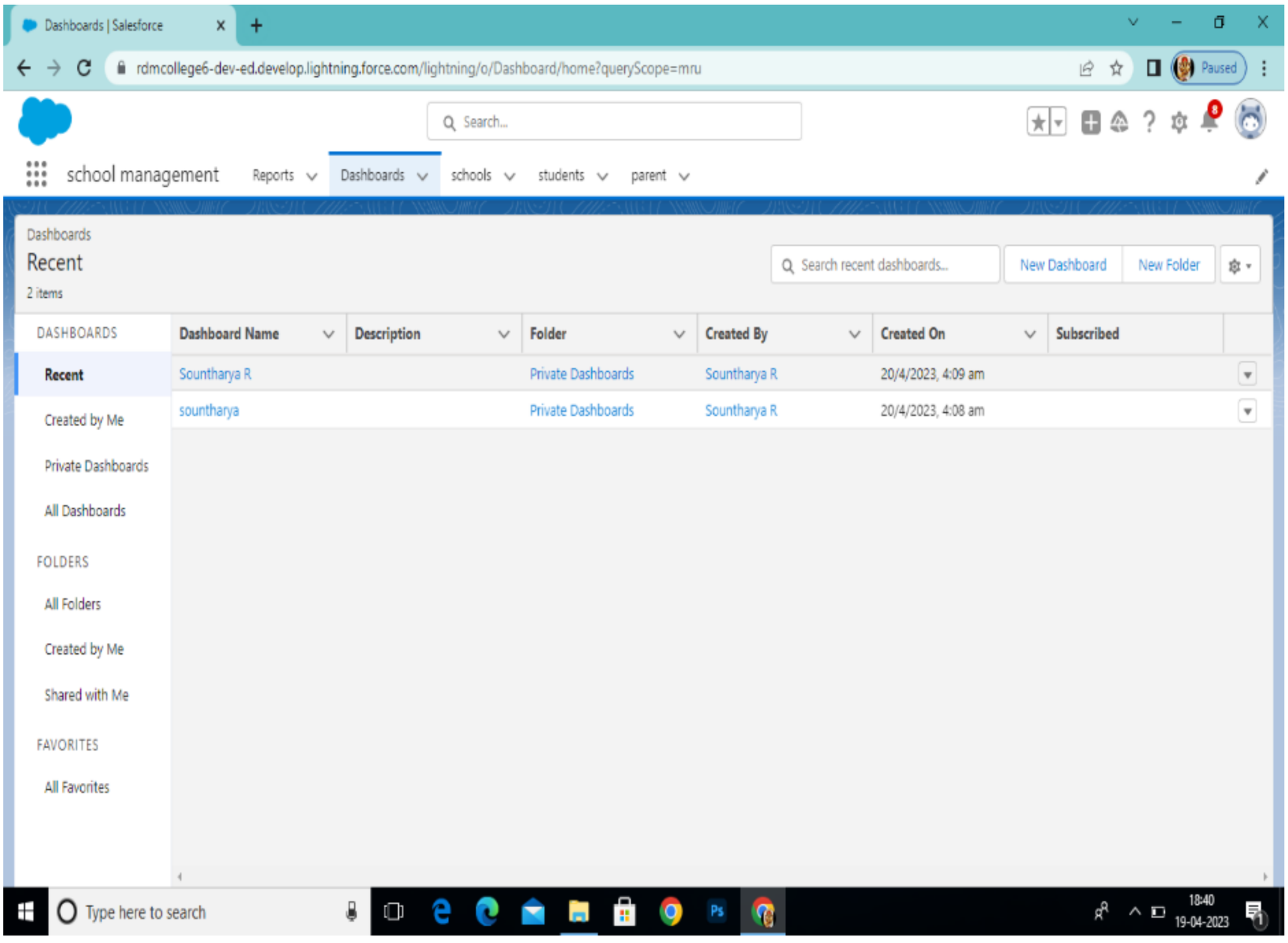
- Users


Users | Salesforce
rdmcollege6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Paused
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
Help for this Page
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
Edit | Chatter Expert | Chatter | chatty.00d5i00000cht8heax.veyf7h1lvegy@chatter.salesforce.com | Chatter Free User
Edit | R, Sountharya | SR | soundaryaravi2001@gmail.com | System Administrator
Edit | R, Sountharya | sounth | sountharya21@gmail.com | System Administrator
Edit | R, Sountharya | sr | sounth21@gmail.com | Standard Platform User
Edit | User, Integration | integ | integration@00d5i00000cht8heax.com | Analytics Cloud Integration User
Edit | User, Security | sec | insightssecurity@00d5i00000cht8heax.com | Analytics Cloud Security User
https://rdmcollege6-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home
Type here to search
18:36
19-04-2023

- Reports


Reports | Salesforce
rdmcollege6-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Paused
Search...
school management
Reports
Dashboards
schools
students
parent
Reports
Recent
2 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
CRM Application for School and College
everything with fingertips
Private Reports
Sountharya R
19/4/2023, 3:40 pm
schools and colleges
everything with fingertips
Private Reports
Sountharya R
19/4/2023, 3:43 pm
https://rdmcollege6-dev-ed.develop.lightning.force.com/lightning/o/Report/home
Type here to search
18:37
19-04-2023

- Dashboard



4. Trailhead Profile Public URL

- **Team Leader - https://trailblazer.me/id/seelm2**
- **Team Member 1 - https://trailblazer.me/id/rathv2**
- **Team Member 2 - https://trailblazer.me/id/sounr5**
- **Team Member 3 https://trailblazer.me/id/mkrishnan85**

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	Storing sensitive candidate information in a CRM system requires robust security measures to prevent unauthorized

and analysis of data.	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.