

# **CRM APPLICATION FOR SCHOOLS / COLLEGES**

## **1 INTRODUCTION**

### **1.1 Overview:**

CRM in higher education mainly focuses on automation and improvement of institutional processes associated with managing student relationships in areas such as recruitment, marketing, communication management and service and support.

### **1.2 Purpose:**

To make CRM for Schools and colleges, with salesforce. The main aim is the parents can easily pick the opt school for their children and the schools also maintain the students records in an effective way. This module will be designed with the above consideration.

## **2 Problem Definition & Design Thinking**

### **2.1 Empathy map:**



2

## Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

### TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Person 1

CRM Software management	Education Topic expertises	Human resource management
Books and DB		

Person 2

Positive teacher web	Control the CRM	Sports activities
Brainstorming partner		

Person 3

Grades of the class score	Parents and teachers	Higher school object
Real management system		

Person 4


Person 5

Control data	Match the file	Default object and completed
Sports activity may include children		

Person 6


Person 7


Person 8


## 3 RESULT

### 3.1 Data model:

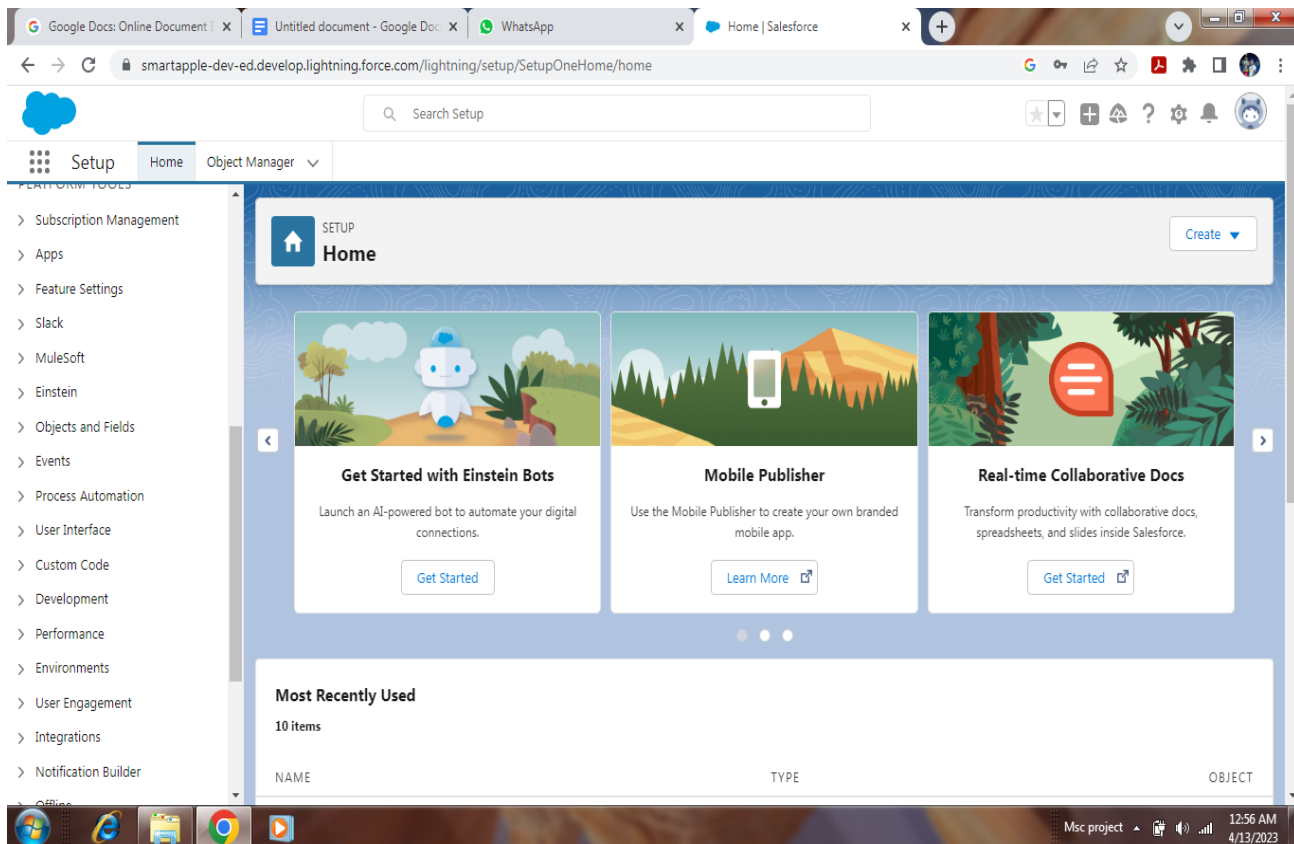
Object Name	Fields in the Object	
Obj1		
	Field Label	Data type
	School	Text
Obj2		
	Field Label	Data type
	Student	Text

	<table><tr><td></td><td></td></tr></table>						
Obj3							
	<table><tr><th>Field Label</th><th>Data type</th></tr><tr><td>Parent</td><td>Text</td></tr><tr><td></td><td></td></tr></table>	Field Label	Data type	Parent	Text		
	Field Label	Data type					
	Parent	Text					

### 3.2 Activity & screenshot:

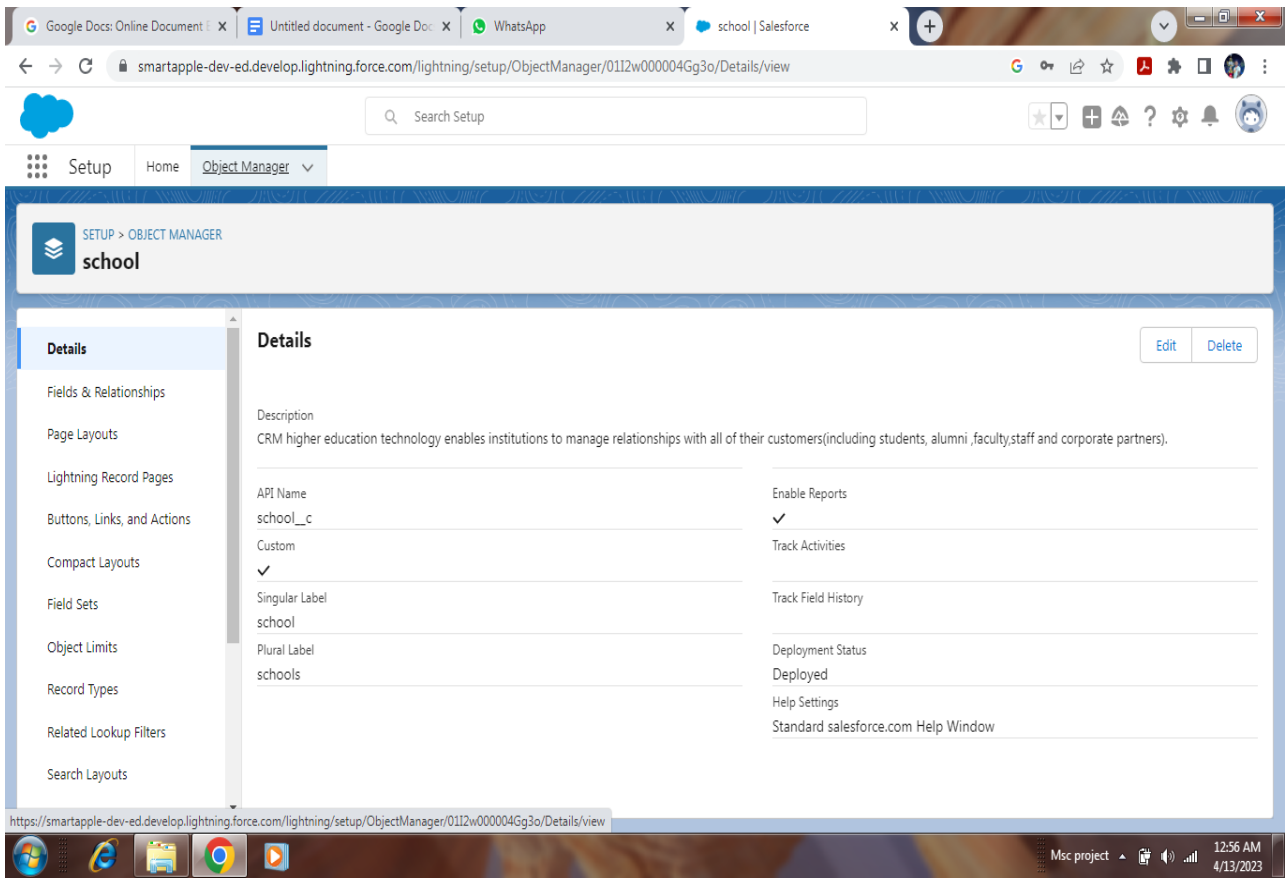
#### Milestone-1:

#### Home page of the salesforce.developers Account



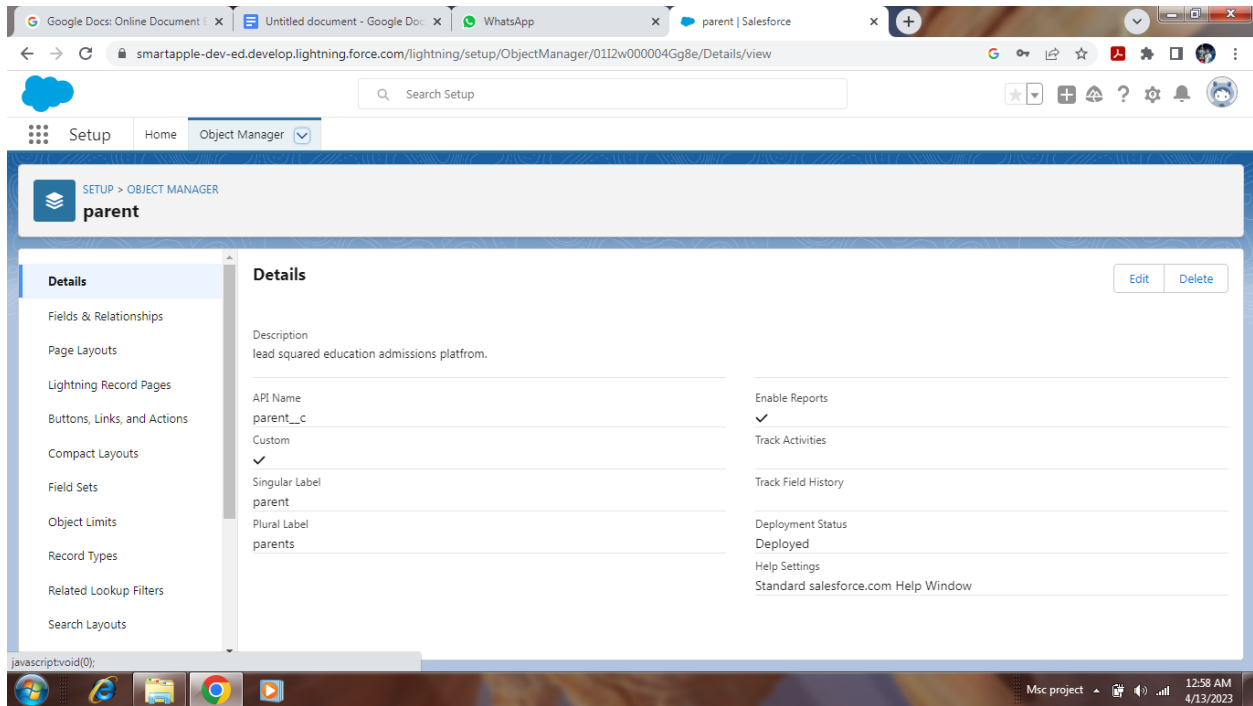
Milestone-2: To create object

Object-1: School:



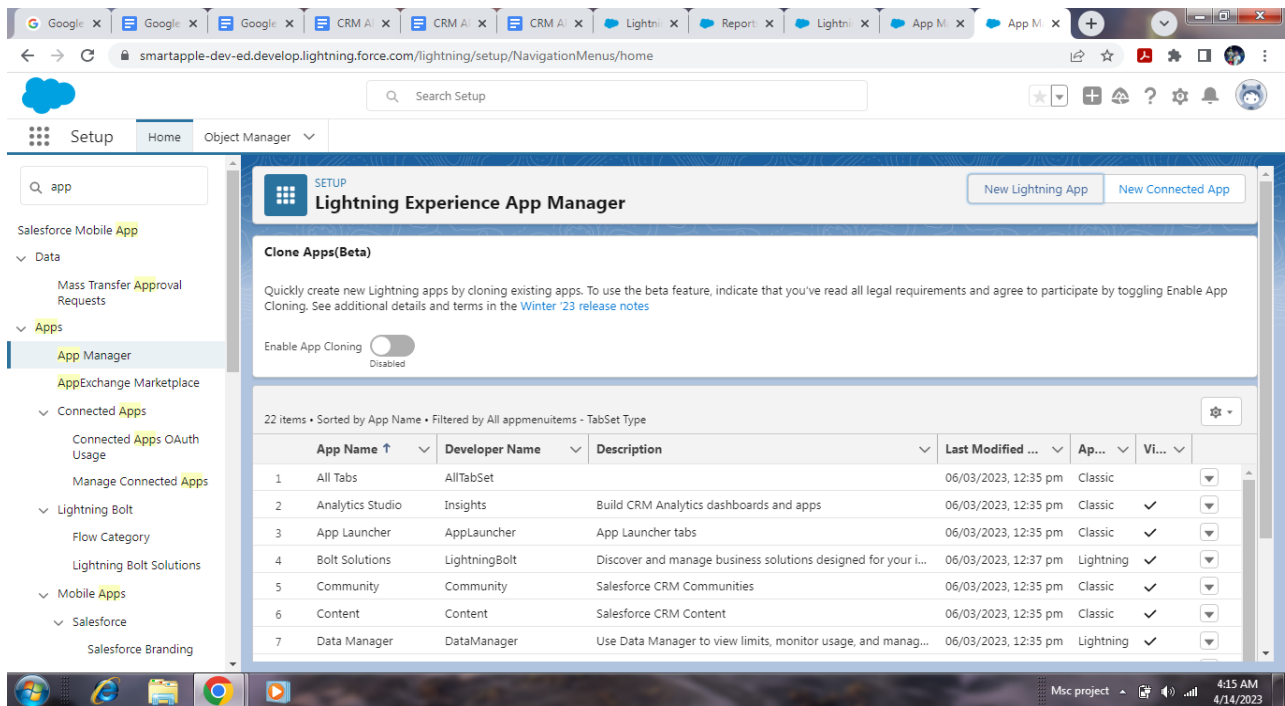
Object-2:Students :





### Milestone -3:Lighting app:

### Milestone -4 :Fields and relationship:



### 1.Creation of fields for the school objects:

Google Docs: Onli x | Untitled documen x | WhatsApp x | Recently Viewed | x | Recently Viewed | x | Lightning Usage | x | school | Salesforce x

smartapple-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gg3o/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
school

Details

**Fields & Relationships**  
10 Items, Sorted by Field Label

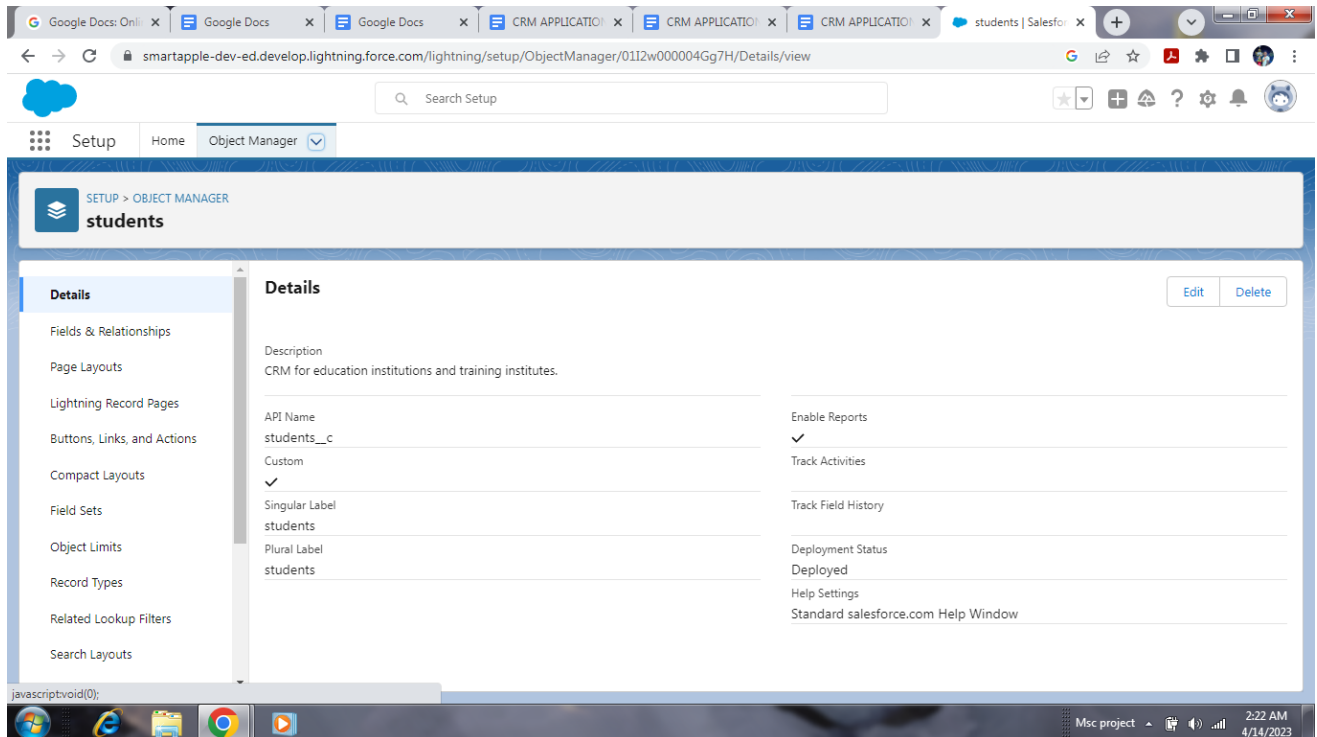
Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Number	Number__c	Phone		
Number of students	Number_of_students__c	Master-Detail(students)	✓	
school Name	Name	Text(80)	✓	
State	State__c	Text Area(255)		
website	website__c	Text Area(255)		
Websites	Websites__c	Text Area(255)		

Windows taskbar: Msc project 1:11 AM 4/13/2023

## 2. Creation of fields for the Students Objects:





### ***3. Creation of fields for the Parent Objects:***

smartapple-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gg8e/Details/view

parent | Salesforce

Search Setup

Setup Home Object Manager

parent

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  
lead squared education admissions platform.

API Name  
parent\_\_c

Custom  
✓

Singular Label  
parent

Plural Label  
parents

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

javascript:void(0);

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smartapple-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Enable App Cloning  
Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	06/03/2023, 12:35 pm	Lightning	✓
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	06/03/2023, 12:35 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	06/03/2023, 12:35 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	06/03/2023, 12:35 pm	Classic	✓
12	Queue Management	QueueManagement	Create and manage queues for your business.	06/03/2023, 12:35 pm	Lightning	✓
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	06/03/2023, 12:35 pm	Classic	✓
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportuniti...	06/03/2023, 12:38 pm	Lightning	✓
15	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple rec...	06/03/2023, 12:35 pm	Lightning	✓
16	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and...	06/03/2023, 12:35 pm	Classic	✓
17	Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	06/03/2023, 12:37 pm	Lightning	✓
18	School Management	School_Management		08/04/2023, 12:11 pm	Lightning	✓
19	Service	Service	Manage customer service with accounts, contacts, cases, an...	06/03/2023, 12:35 pm	Classic	✓
20	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple...	06/03/2023, 12:35 pm	Lightning	✓

Msc project 3:14 AM 4/14/2023

**Milestone- 5:Profile:**

Google Docs x Untitled docu x WhatsApp x Recently View x Recently View x Lightning Usa x school | Sales x Profiles | Sales x

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

App Launcher Search Setup

Setup Home Object Manager

Q pro

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

Settings

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"/>

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Msc project 1:14 AM 4/13/2023

## Milestones-6:User:

Google Docs x Untitled docu x WhatsApp x Recently View x Recently View x Lightning Usa x school | Sales x Users | Sales x

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

Setup Home Object Manager

Q 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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chattv00d2w00000r8n8eal.f8sovreiba2s@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Manikandan, Manikandan	MMari	manu@smartapple.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Parents, Parents	ppare	manu0003amk@gmail.com		<input checked="" type="checkbox"/>	School profile
Edit	Principal, Principal	pprin	vijaykale338@gmail.com		<input checked="" type="checkbox"/>	Identity User
Edit	Teacher, Teacher	tteac	karthikraja68777@gmail.com		<input checked="" type="checkbox"/>	Identity User
Edit	User Integration	inteo	integration@00d2w00000r8n8eal.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2w00000r8n8eal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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Milestone-7 Permission sets:

Google Docs x Untitled docu x WhatsApp x Recently View x Recently View x Lightning Usa x school | Salesf x Permission Set x

smartapple-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

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

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https://smartapple-dev-ed.develop.lightning.force.com/one/one.app#/setup/Per...

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Milestone-8: Reports:

Google x Google x Google x CRM APP x CRM APP x CRM APP x Lightning x Reports x Lightning x App Mar x

smartapple-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr

Lightning Usage App Lightning Usage schools parents students New parents Report New students with schools ...

Reports

Recent

2 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New students with schools Report		Private Reports	Manikandan Mariyappan	13/4/2023, 3:02 pm	
Created by Me	New parents Report		Private Reports	Manikandan Mariyappan	13/4/2023, 3:03 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

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#### **4 TRAILHEAD PROFILE PUBLIC URL**

Team lead-<https://trailblazer.me/id/mmariyappan1>  
Team member 1-<https://trailblazer.me/id/kthangamani3>  
Team member 2-<https://trailblazer.me/id/mmnavinapriyan>  
Team member 3-<https://trailblazer.me/id/ksamiyappan>

#### **5 ADVANTAGES**

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.

Educational institutes have to deal with a number of processes including resource management and administrative tasks. Any standard college or university routinely manages admissions and recruitments, tackles student queries, and invests in alumni relationships. Most educational institutes have now started using CRM systems for better relationship management with their employees and students

#### **DISADVANTAGES**

Every business is planned, established, and run on the basis of its customers. Customers are like the blood of every business, without which business organs can't function. Happy customer reflects the quality and growth of any business. With the evolution of technology, the business also adopts digital platforms and starts interacting with customers.

Technology has helped the business to reach its customers within a second. But more than interaction is needed in the long run, a business must maintain the satisfaction and happiness of its customers and it comes by solving their problems. This can be done by creating a relationship with the customers, a deep necessity for the business.

#### **6 APPLICATION**

It helps schools and educational institutions automate admission processes and manage communication with students and parents. Do schools use CRM systems? Yes. Schools use CRM systems to manage admission processes (follow-ups, open houses, grants, etc.), marketing communications, and automate admission workflows.

## **7 CONCLUSION**

More and more organizations, from private to public sectors, are pursuing higher levels of customer satisfaction, loyalty and retention. With this intent, higher education institutions (HEI) have adopted CRM – Customer Relationship Management. In order to analyze some of the interesting aspects of this phenomenon, we conducted an action

research in a European Institute. The main research question we answered is “how to adopt a CRM strategy in a Higher Education Institution?” Some of the main findings of this study are (1) even though HEI's main customer is the student, there are others stakeholders that a CRM project must consider; (2) universities can use their internal resources to implement a CRM project successfully; and (3) using Agile...

## **8 FUTURE SCOPE**

The CRM and the mobile app are very easy & simple to use for any kind of user even without any kind of computer knowledge. All flexible customizations are available in the system