

A CRM APPLICATION FOR SCHOOLS AND COLLEGES

- TEAM MEMBERS

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1. INTRODUCTION

1.1 OVERVIEW

A CRM application for schools will be very much helpful for maintaining huge records of the students in cloud and data can be manipulated by school authorities for the betterment of the students and for the possible communication of parents.

1.2 PURPOSE

AN education CRM system specifically tailored for the educational institute, colleges, and other educational organizations to manage the whole process, from inquiry to enrollment to alumni and beyond.

CRM systems used to automate and handle communications with prospective and current students, teachers, employees, organizations, donors, and everyone in your organizations community.

Customer relationship management solutions are required in the education sector to make fast, dynamic, and affordable solutions that make it easy for universities to handle daily activities. The CRM gives a proper understanding of the

students and activities carried out in the university. It also lets students communicate with the university.

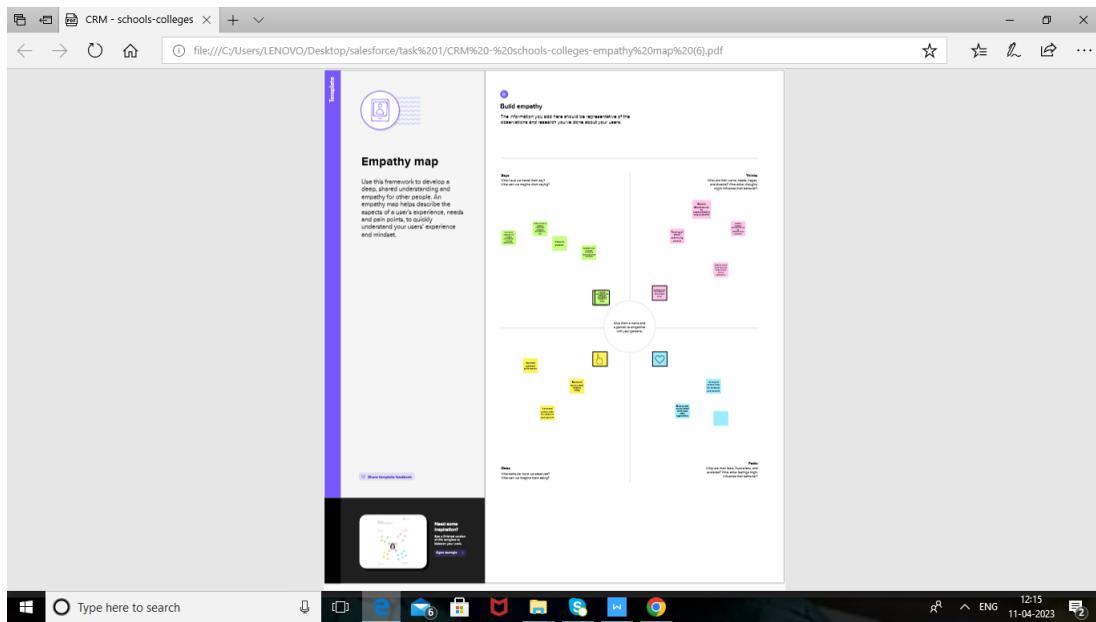
In a custom CRM for a university, students get information about enrollment, registration, financial help, accommodation, and so on. They are considered as the customers, and the goal is to provide top-quality services to students.

With CRM solutions, universities can manage their students effectively. CRM also collects the management records such as student attendance, course curriculum, extracurricular activity records, and so on. It also maintains data privacy by automating processes. By analyzing the CRM information, solutions to problems can be found.

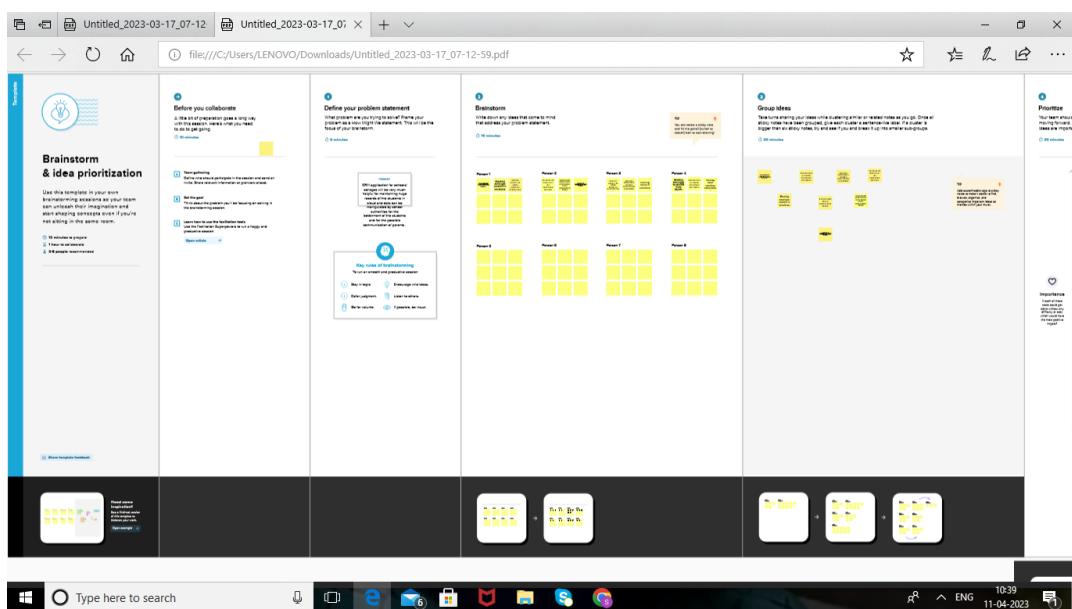
A CRM increases productivity, allows communication between students and alumni, and reduces administrative tasks in the education industry. Eventually, it helps the institute to establish itself as a brand in the CRM.

2 PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION AND BRAINSTORMING MAP



3 RESULT

3.1 DATA MODEL

OBJECT NAME	FIELD IN THE OBJECT													
SCHOOL	<table border="1"><thead><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr></thead><tbody><tr><td>ADDRESS</td><td>TEXT AREA</td></tr><tr><td>DISTRICT</td><td>TEXT AREA</td></tr><tr><td>STATE</td><td>TEXT AREA</td></tr><tr><td>SCHOOL WEBSITE</td><td>TEXT AREA</td></tr><tr><td>PHONE NUMBER</td><td>PHONE</td></tr></tbody></table>		FIELD LABEL	DATA TYPE	ADDRESS	TEXT AREA	DISTRICT	TEXT AREA	STATE	TEXT AREA	SCHOOL WEBSITE	TEXT AREA	PHONE NUMBER	PHONE
FIELD LABEL	DATA TYPE													
ADDRESS	TEXT AREA													
DISTRICT	TEXT AREA													
STATE	TEXT AREA													
SCHOOL WEBSITE	TEXT AREA													
PHONE NUMBER	PHONE													
STUDENT	<table border="1"><thead><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr></thead><tbody><tr><td>STUDENT NAME</td><td>TEXT AREA</td></tr><tr><td>CLASS</td><td>NUMBER</td></tr><tr><td>SCHOOL</td><td>TEXT AREA</td></tr><tr><td>PHONE NUMBER</td><td>PHONE</td></tr><tr><td>RESULT</td><td>PICK LIST</td></tr></tbody></table>		FIELD LABEL	DATA TYPE	STUDENT NAME	TEXT AREA	CLASS	NUMBER	SCHOOL	TEXT AREA	PHONE NUMBER	PHONE	RESULT	PICK LIST
FIELD LABEL	DATA TYPE													
STUDENT NAME	TEXT AREA													
CLASS	NUMBER													
SCHOOL	TEXT AREA													
PHONE NUMBER	PHONE													
RESULT	PICK LIST													
PARENTS	<table border="1"><thead><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr></thead><tbody><tr><td>PARENT NAME</td><td>TEXT AREA</td></tr><tr><td>STUDENT NAME</td><td>TEXT AREA</td></tr><tr><td>CLASS</td><td>NUMBER</td></tr><tr><td>SCHOOL</td><td>TEXT AREA</td></tr><tr><td>ADDRESS</td><td>TEXT AREA</td></tr></tbody></table>		FIELD LABEL	DATA TYPE	PARENT NAME	TEXT AREA	STUDENT NAME	TEXT AREA	CLASS	NUMBER	SCHOOL	TEXT AREA	ADDRESS	TEXT AREA
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PARENT NAME	TEXT AREA													
STUDENT NAME	TEXT AREA													
CLASS	NUMBER													
SCHOOL	TEXT AREA													
ADDRESS	TEXT AREA													

	PHONE NUMBER	PHONE	
PRINCIPAL			
TEACHER			

3.2 ACTIVITY AND SCREENSHOT

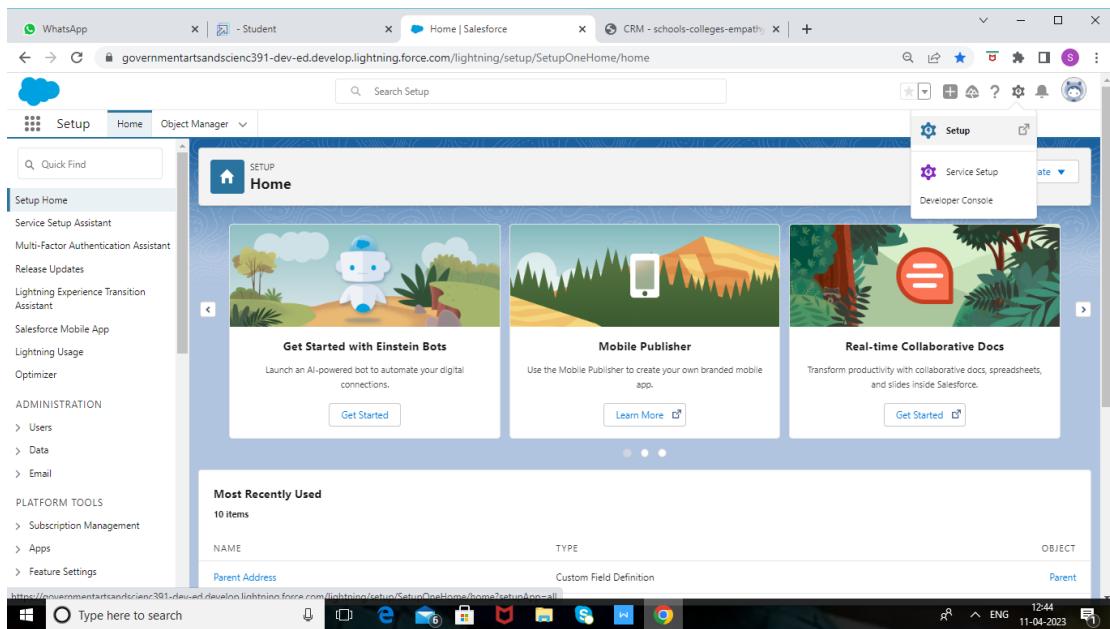
Creation Of School Object

Creation of Objects for School Management:

For this school management we need to create 3 objects i.e school,parents and students.

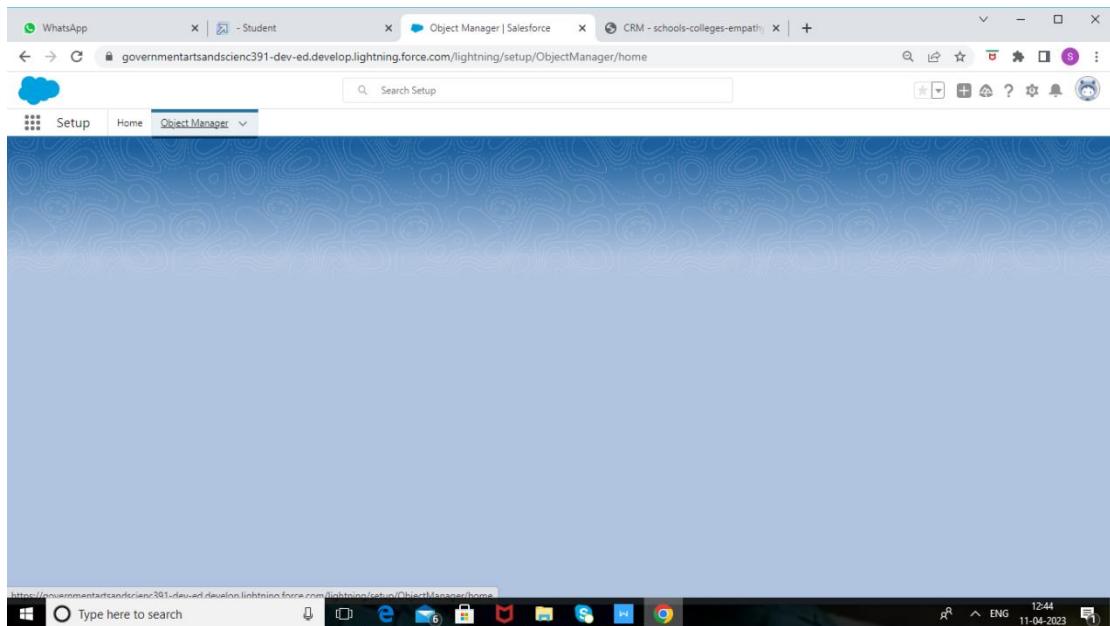
STEP 1

Click on the gear icon and then select Setup.



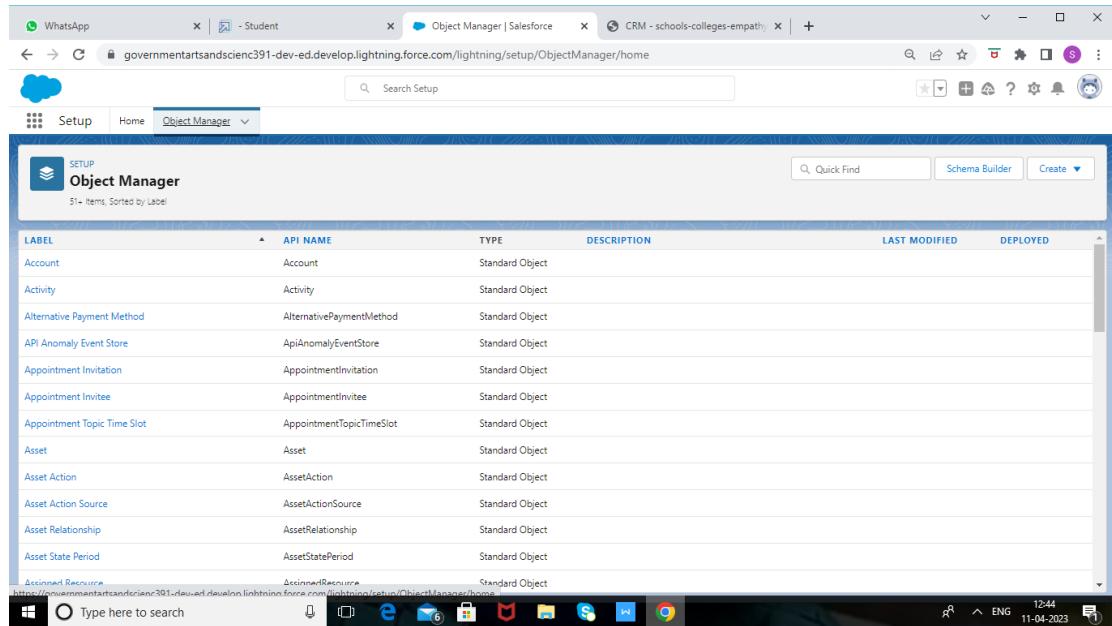
STEP 2

Click on the object manager tab just beside the home tab.



After the above steps, have a look on the extreme right you will find a Create Dropdown

click on that and select Custom Object.



The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for 'Setup' and 'Object Manager'. The main area displays a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects such as Account, Activity, Alternative Payment Method, etc. The 'Object Manager' tab is selected. The URL in the browser is <https://governmentartsandscien391-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Assigned Resource	AssignedResource	Standard Object			

STEP 3

On the Custom Object Definition page, create the object as follows:

- b. Label: School
- c. Plural Label: Schools
- d. Record Name: School Name
- e. Check the Allow Reports checkbox
- f. Check the Allow Search checkbox
- g. Click Save.

(2) WhatsApp - Student - New Custom Object | Salesforce - CRM - schools-colleges-empathy

governmentartsandscien391-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Cloud Setup Home Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again.](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: **SCHOOL** Example: Account
Plural Label: **SCHOOLS** Example: Accounts
Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: **SCHOOL** Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name: **SCHOOL Name** Example: Account Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: **SCHOOL Name** Example: Account Name

Save Save & New Cancel

Setup Home Object Manager

Type here to search

12:48 ENG 11-04-2023

(2) WhatsApp - Student - School | Salesforce - CRM - schools-colleges-empathy

governmentartsandscien391-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w0000004426X/Details/view

Cloud Setup Home 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

List View Button Layout

Restriction Rules

Details

Description:

API Name: **School_c**
Custom:
Singular Label: **School**
Plural Label: **Schools**

Enable Reports:
Track Activities:
Track Field History:
Deployment Status: **Deployed**
Help Settings: **Standard salesforce.com Help Window**

Edit Delete

Setup Home Object Manager

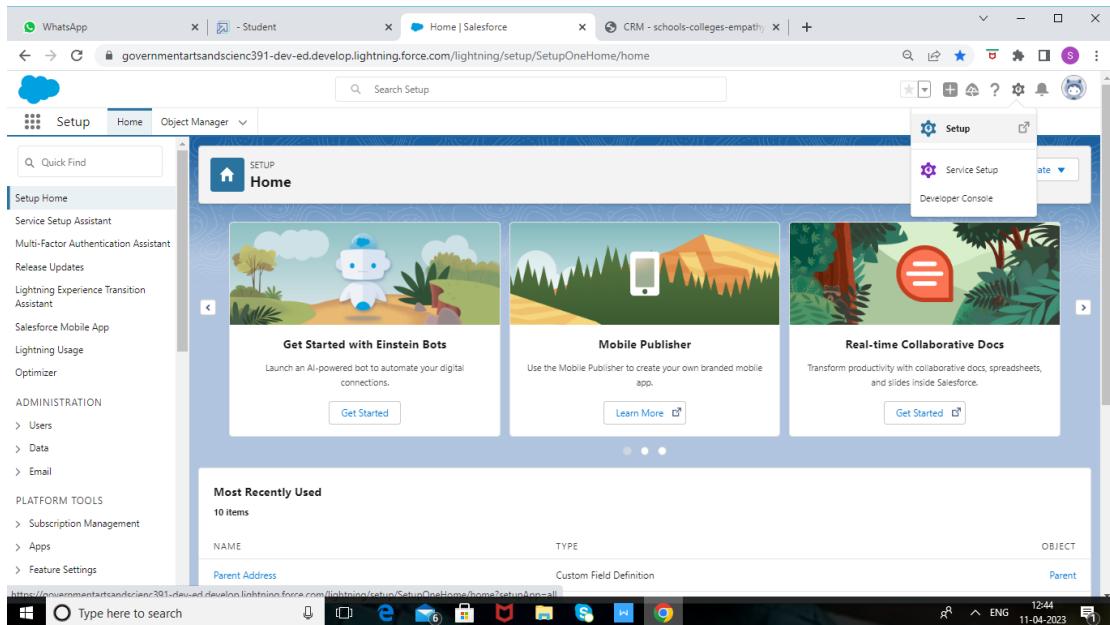
Type here to search

12:48 ENG 11-04-2023

Create Student Object

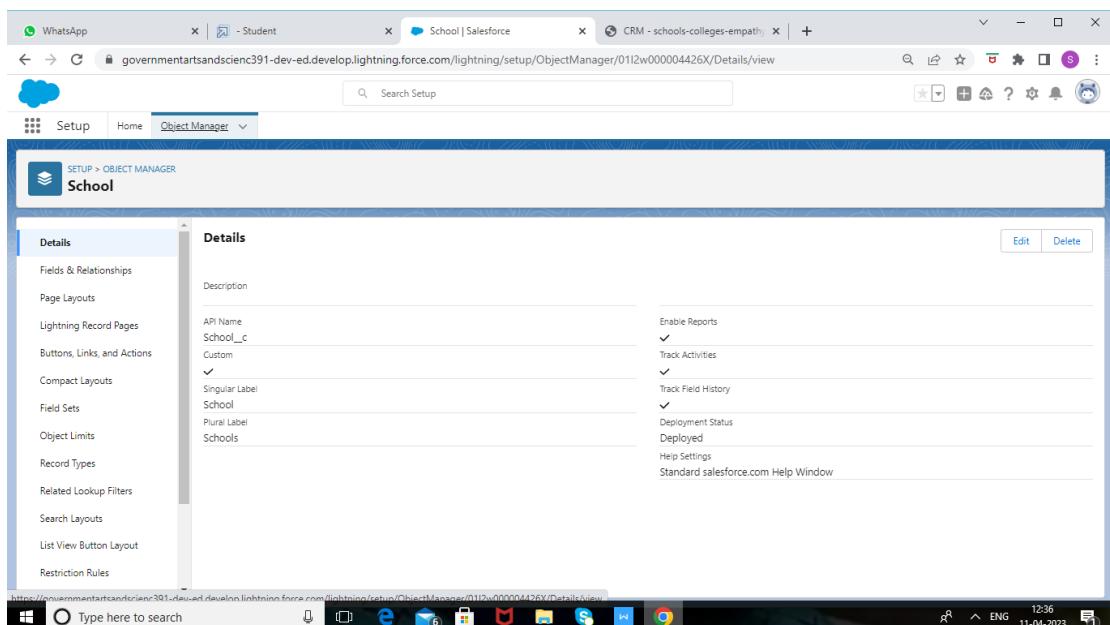
STEP 1

Click on the gear icon and then select Setup.



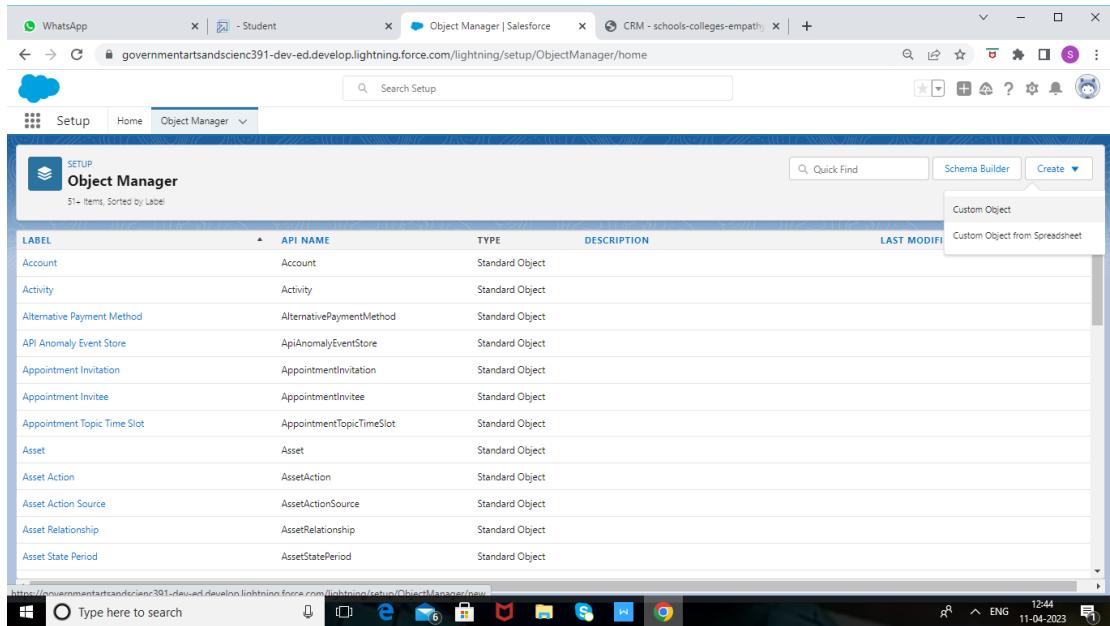
STEP 2

Click on the object manager tab just beside the home tab.



STEP 3

After the above steps, have a look on the extreme right you will find a Create Dropdown
click on that and select Custom Object.



- a. On the Custom Object Definition page, create the object as follows:
- b. Plural Label: Students
- c. Record Name: Student Name
- d. Check the Allow Reports checkbox
- e. Check the Allow Search checkbox
- f. Click Save.

The screenshot shows the Salesforce Setup interface with the title "New Custom Object". The "Custom Object Definition Edit" page is displayed. Key fields filled in include:

- Label:** STUDENT
- Plural Label:** STUDENTS
- Object Name:** STUDENT
- Description:** (empty)

Other settings shown include:

- Context-Sensitive Help Setting: Open a window using a Visualforce page
- Content Name: -None-

At the top, a message states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." There are "Save", "Save & New", and "Cancel" buttons.

The screenshot shows the Salesforce Object Manager with the title "Student". The "Details" tab is selected. The object's configuration includes:

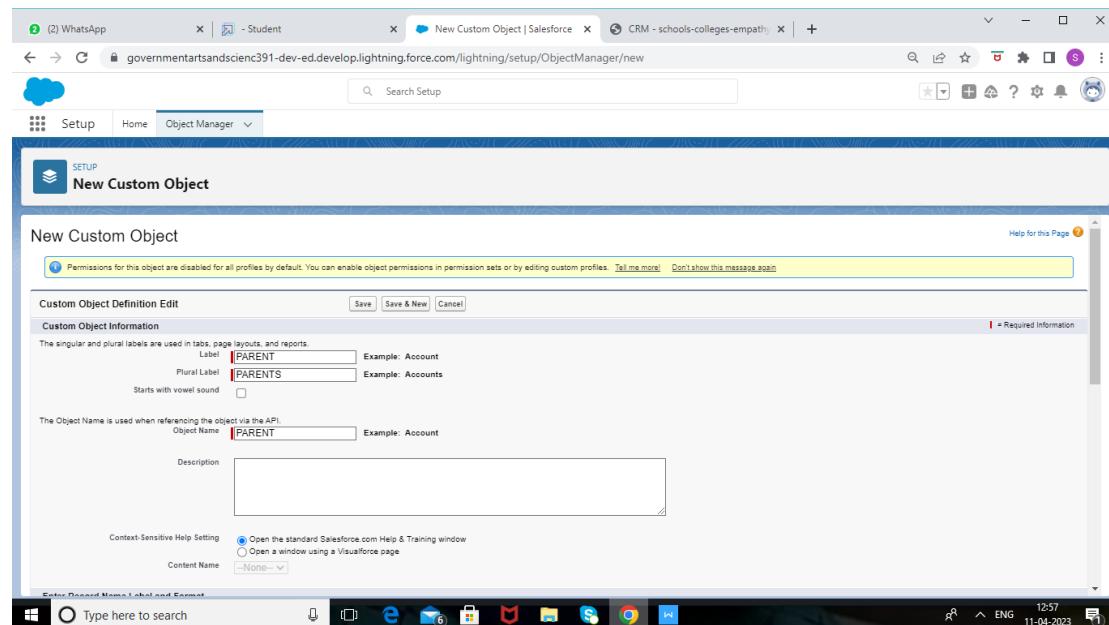
- API Name:** Student__c
- Singular Label:** Student
- Plural Label:** students
- Description:** (empty)
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

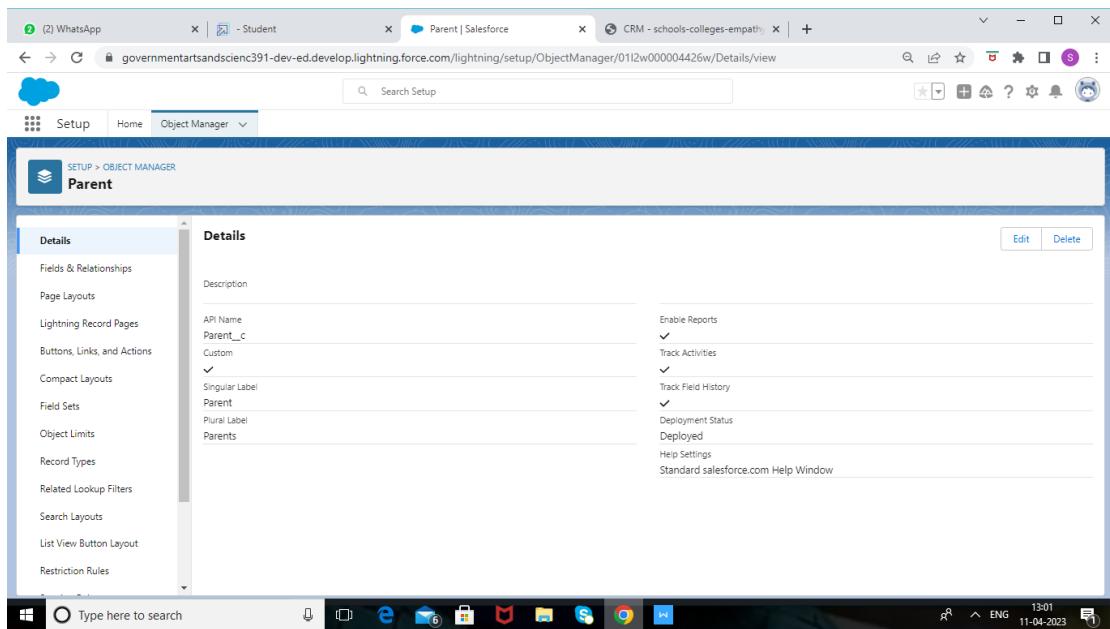
The left sidebar lists various object management options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.

Create Parent Object

STEP 1

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown
click on that and select Custom Object.

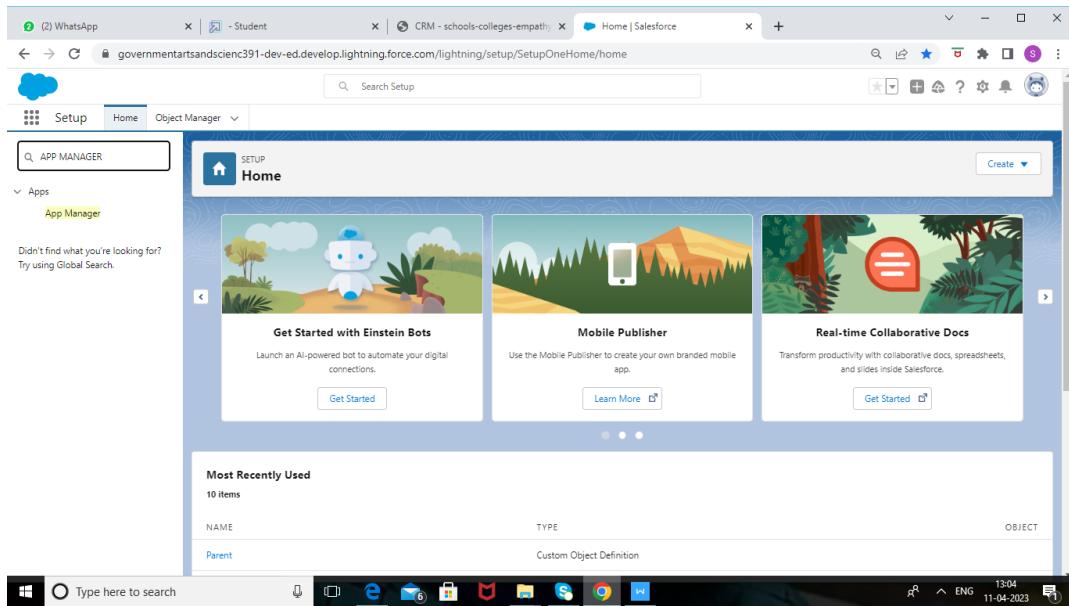




Create The School Management App

STEP 1

From Setup, enter App Manager in the Quick Find and select App Manager.

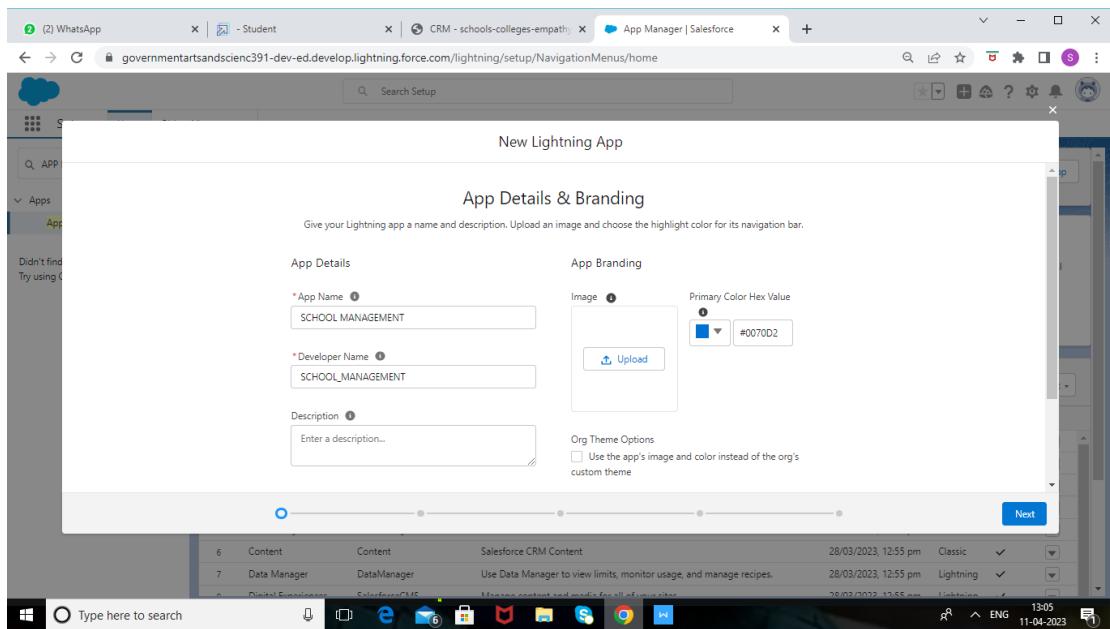


STEP 2

Click New Lightning App. Enter School Management as the App Name, then click Next

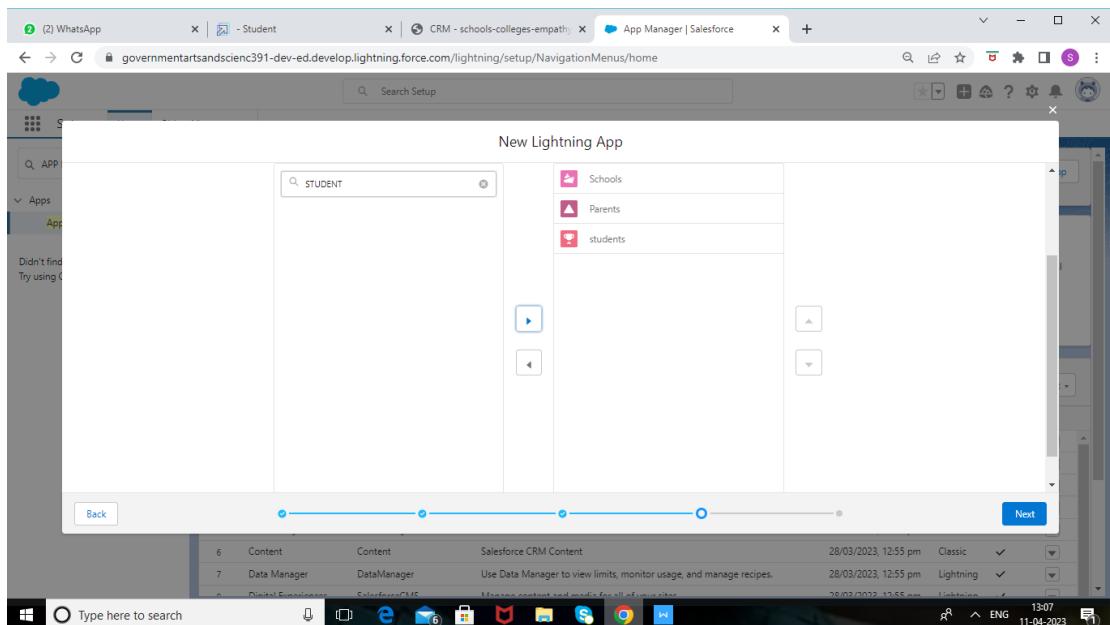
The screenshot shows the Salesforce App Manager interface. The top navigation bar includes tabs for Setup, Home, Object Manager, and App Manager. The main content area is titled "Lightning Experience App Manager" and displays the "Clone Apps(Beta)" section. A note states: "Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes." Below this is a toggle switch labeled "Enable App Cloning" which is set to "Disabled". A table lists 22 items, sorted by App Name, with columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table includes links for cloning each app. The bottom status bar shows the URL as https://governmentartsandscien391-dev-ed.develop.lightning.force.com/ope/one/app#/edit/NavigationMenus/home, the date as 11-04-2023, and the time as 13:04.

App Name ↑	Developer Name	Description	Last Modified D...	App ...	Visi...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	28/03/2023, 12:55 pm	Classic	✓
2 Analytics Studio	Insights	Discover and manage business solutions designed for your industry.	28/03/2023, 12:55 pm	Classic	✓
3 App Launcher	AppLauncher	Salesforce CRM Communities	28/03/2023, 12:55 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Salesforce CRM Content	28/03/2023, 12:55 pm	Classic	✓
5 Community	Community	Use Data Manager to view limits, monitor usage, and manage recipes.	28/03/2023, 12:55 pm	Lightning	✓
6 Content	Content	Content	28/03/2023, 12:55 pm	Classic	✓
7 Data Manager	DataManager	Data Manager	28/03/2023, 12:55 pm	Lightning	✓



Under Utility Items, leave as is and click Next.

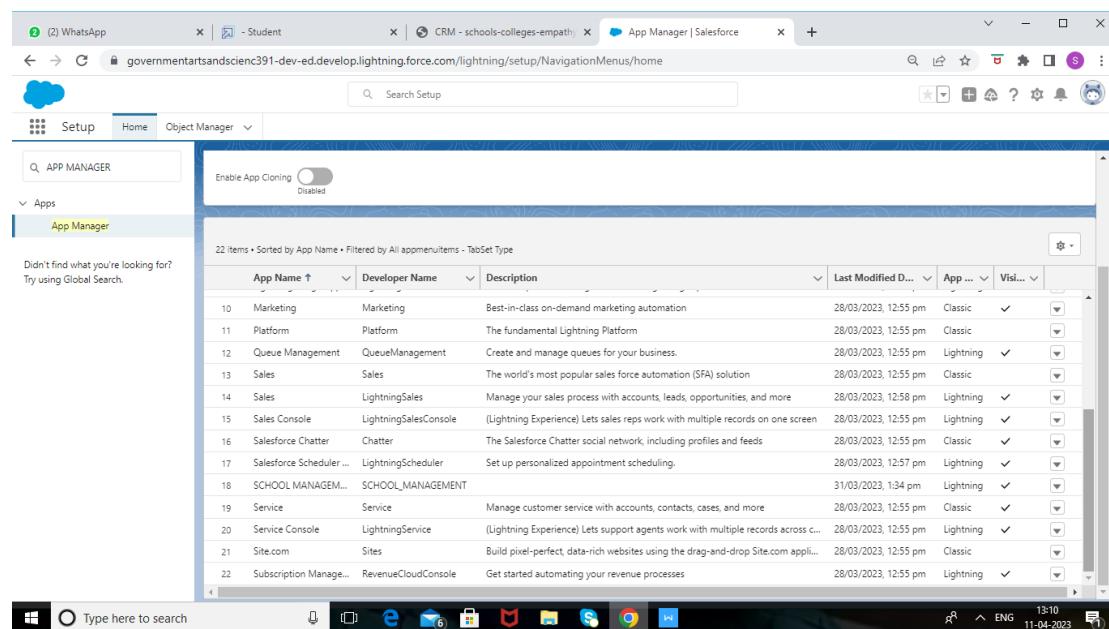
From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.



From Available Profiles, select System Administrator and move it to Selected Profiles.

Click Save & Finish.

To verify your changes, click the App Launcher, type School Management and select the School Management app.

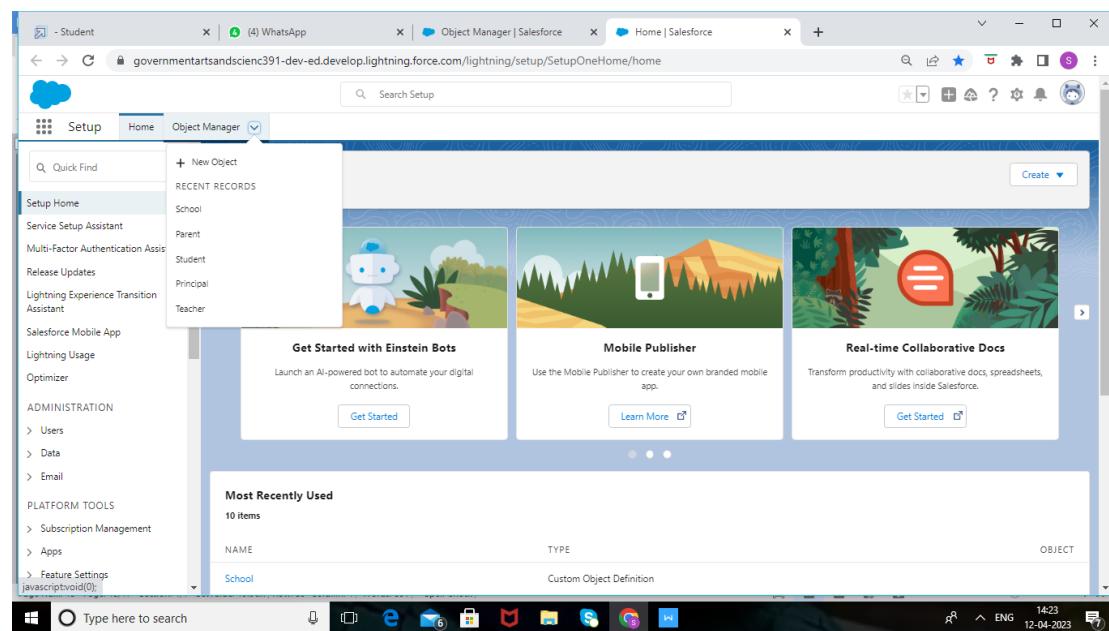


Creation Of Fields For The School Objects

Step 1

click the gear icon and select Setup. This launches Setup in a new tab.

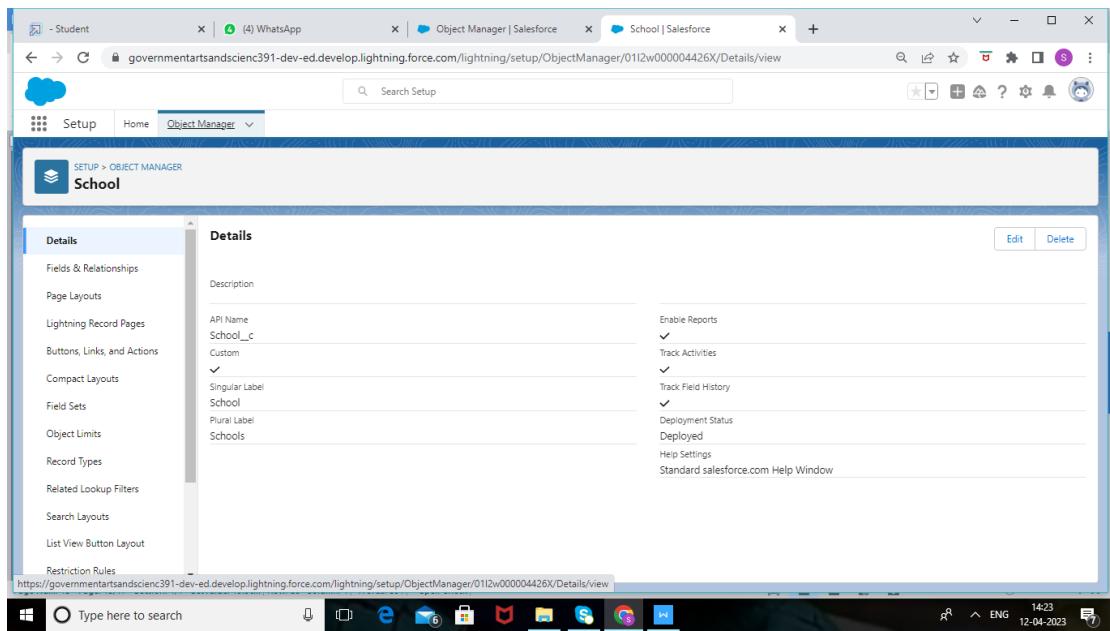
Click the Object Manager tab next to Home.



Step 2

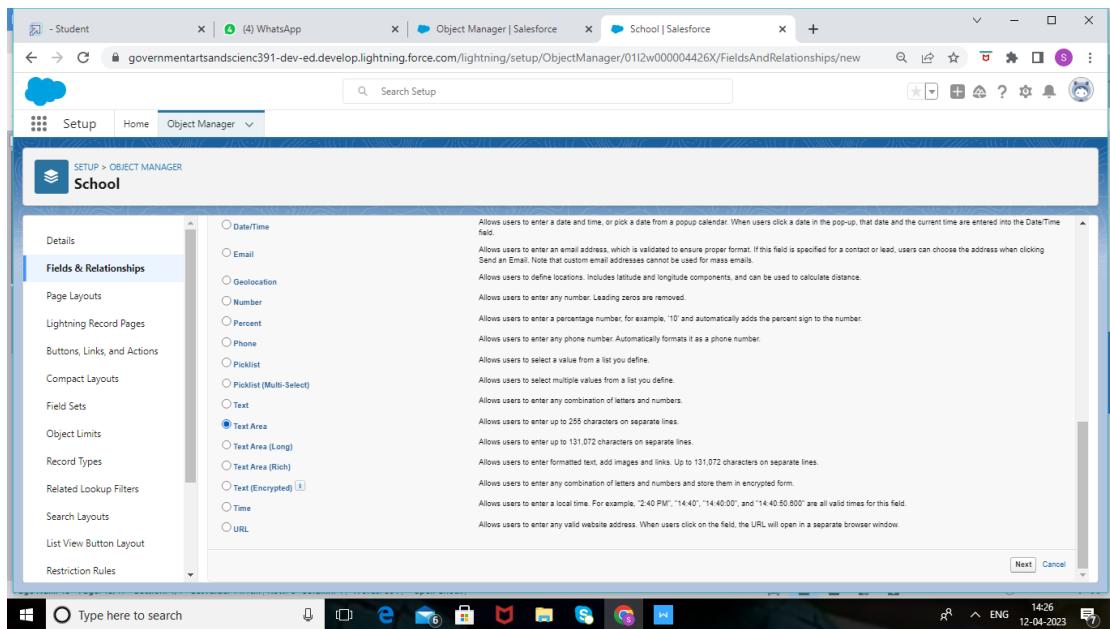
Select School.

Select Fields & Relationships from the left navigation, and click New

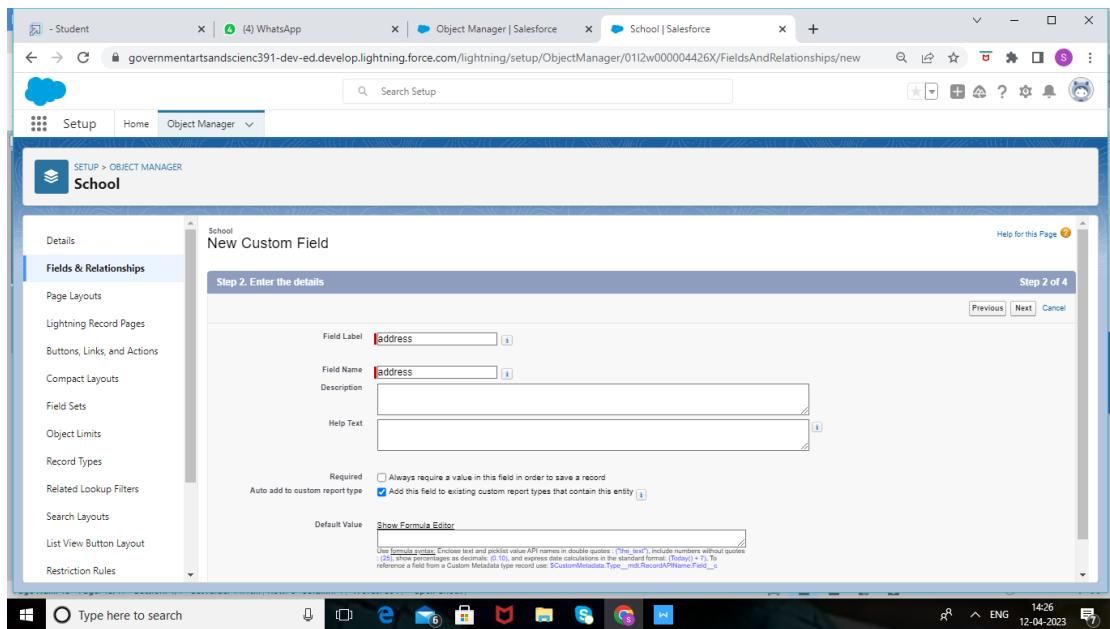


Now we're ready to make a custom field. Let's do this!

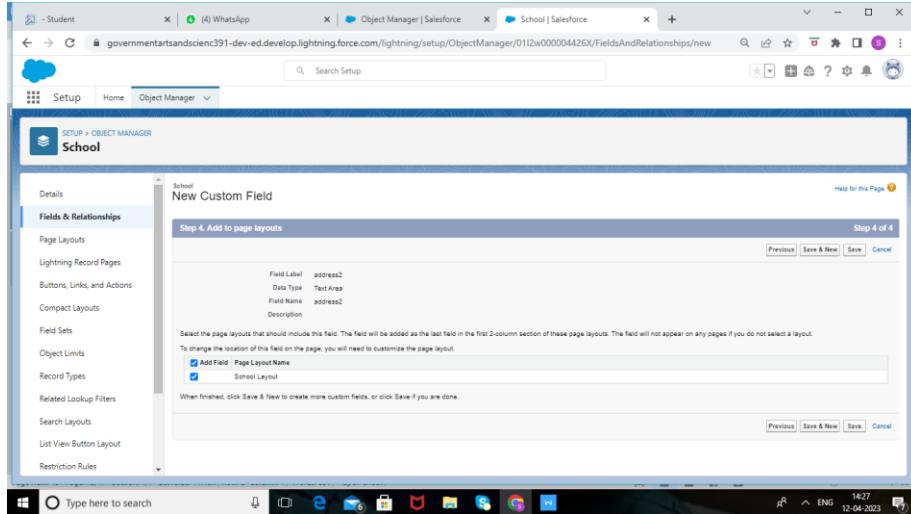
Select the Text Area as the Data Type, then click Next.



For Field Label, enter Address.



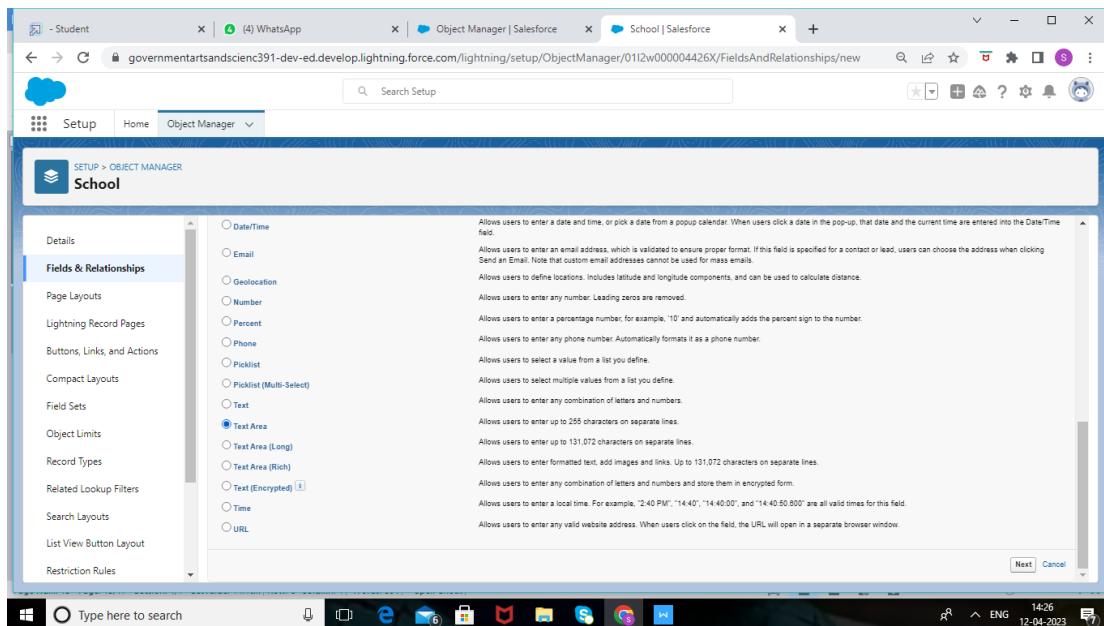
1. Click Next, Next, then Save & New.



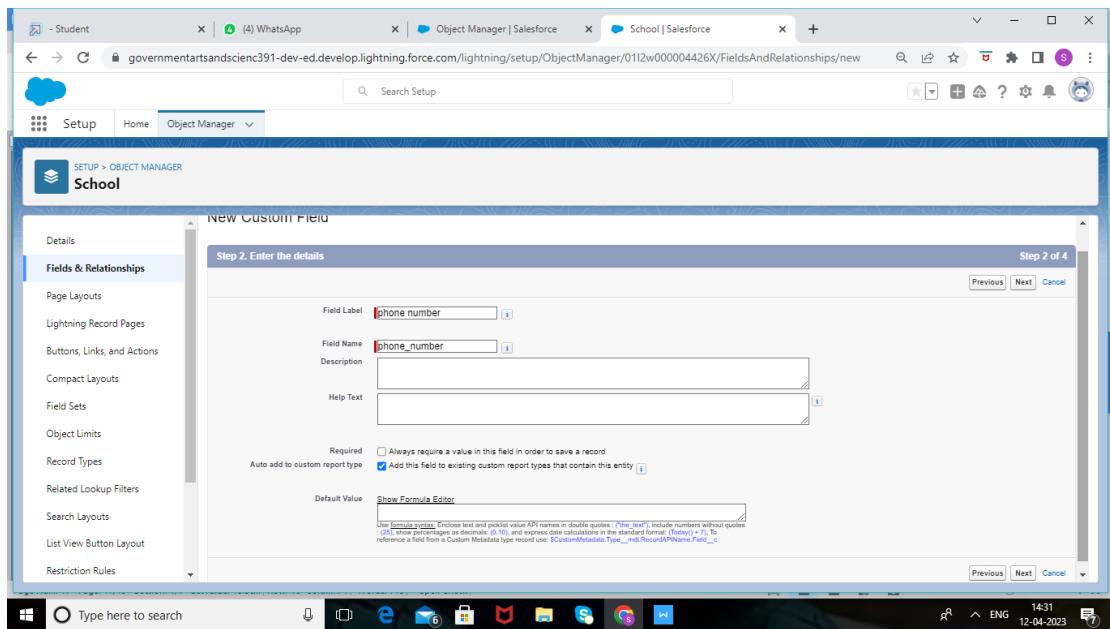
4. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field label

Now let's create the other fields and we must choose the data types of the fields carefully .Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type.



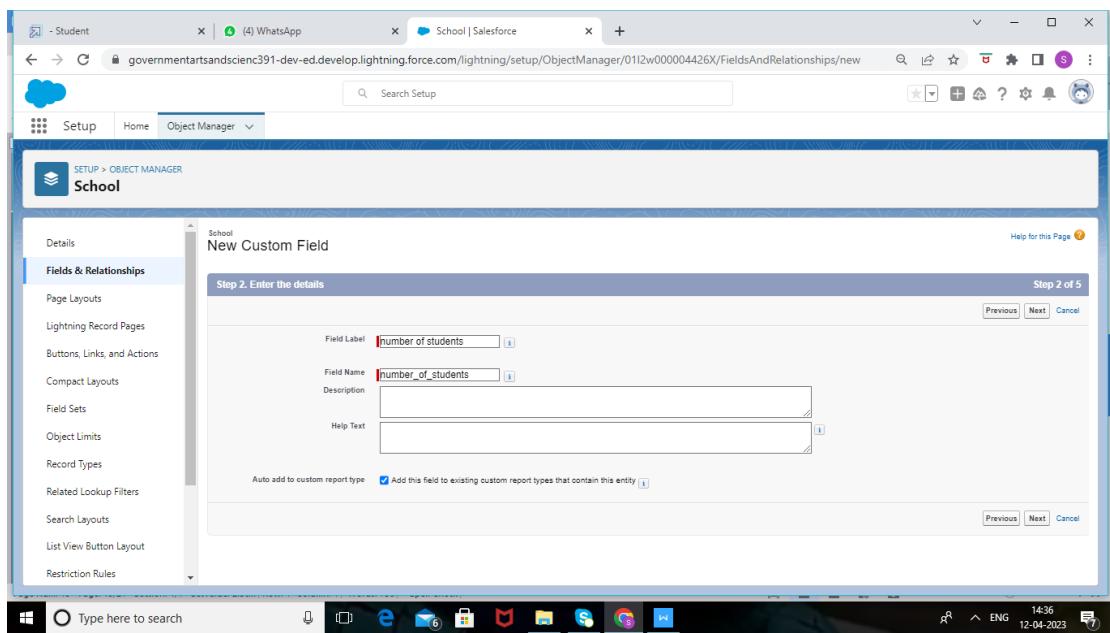
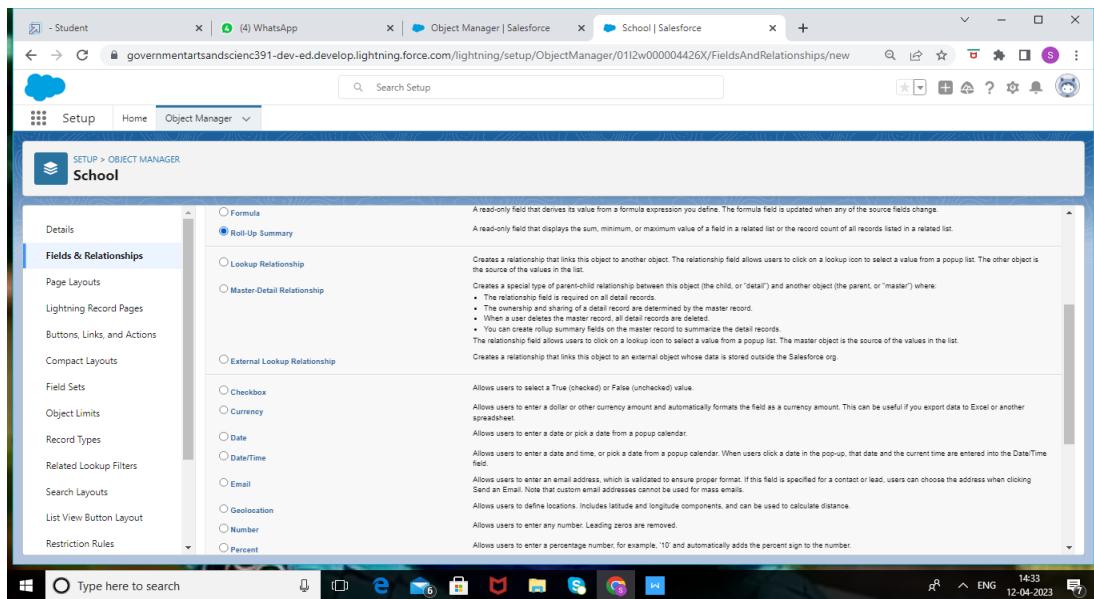
1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.



Click Next, Next, then Save & New.

Lets create Roll-up summary fields to calculate the number of students

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type

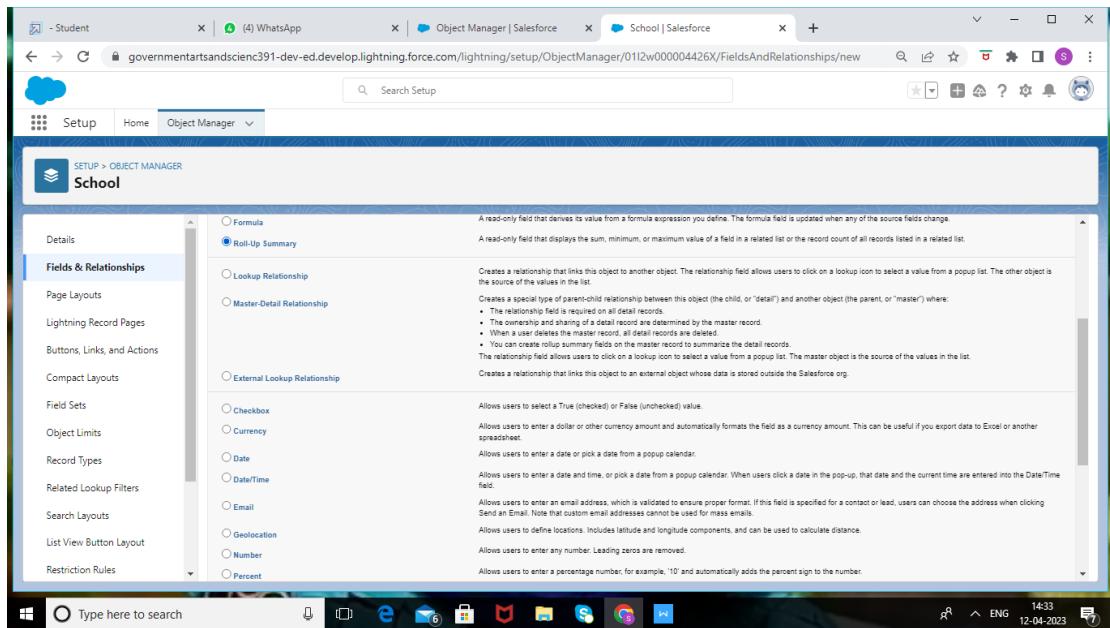


4. Enter the field label as Number of students

5. Click Next

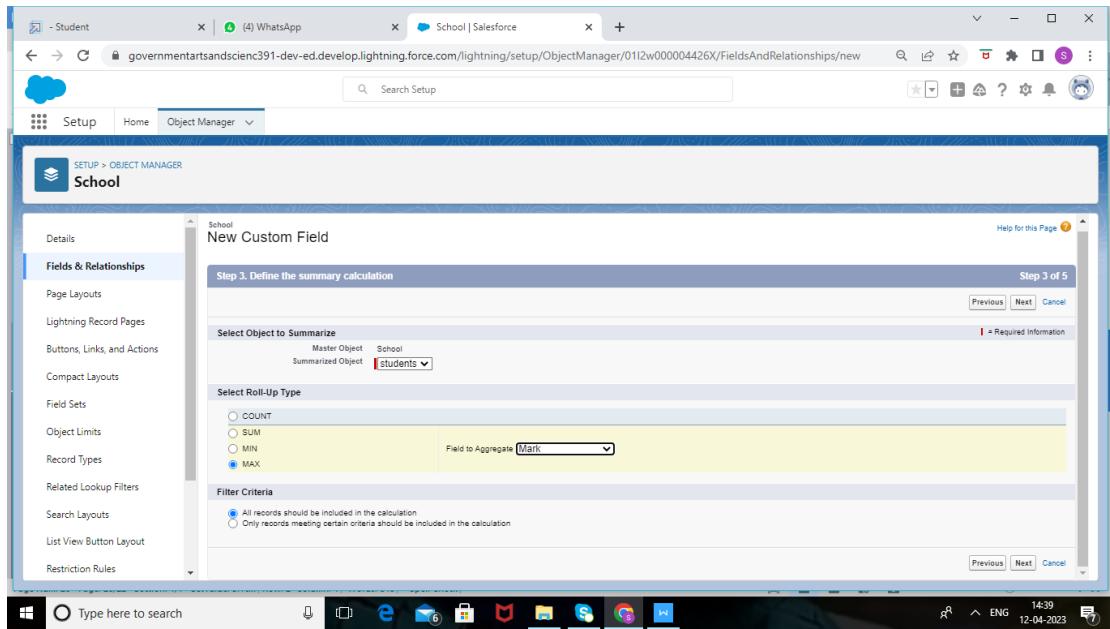
6. Then select the master object summarized as students and then select count as roll-up and then click Next,Next and save.

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type



Enter the field label as Highest Marks

Click Next



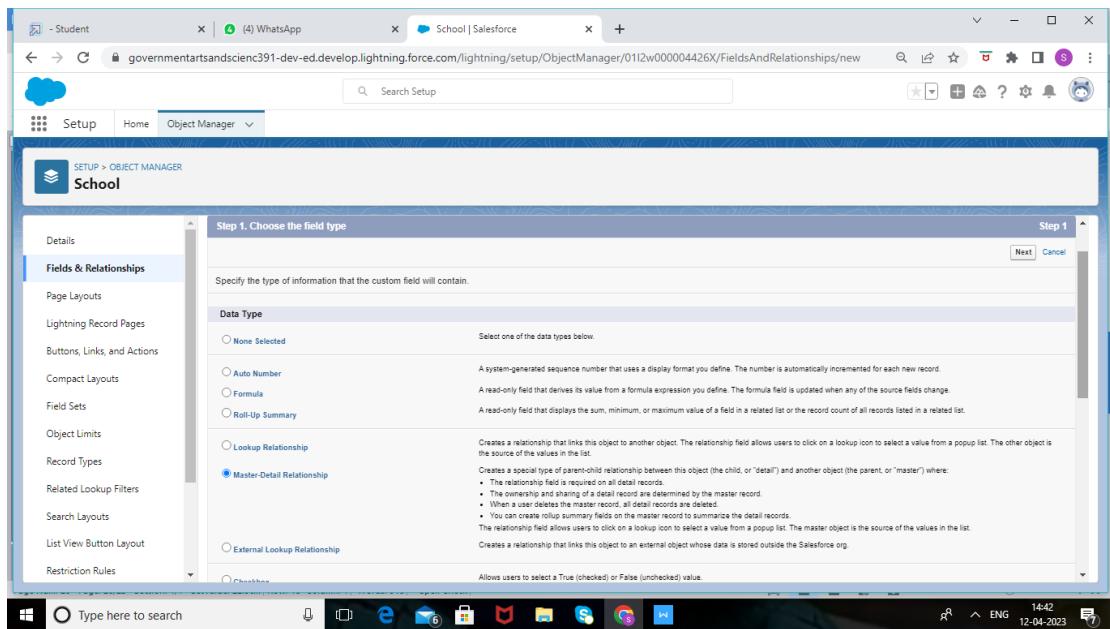
6. Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate. click Next, Next and save.

Creation Of Fields For The Student Objects

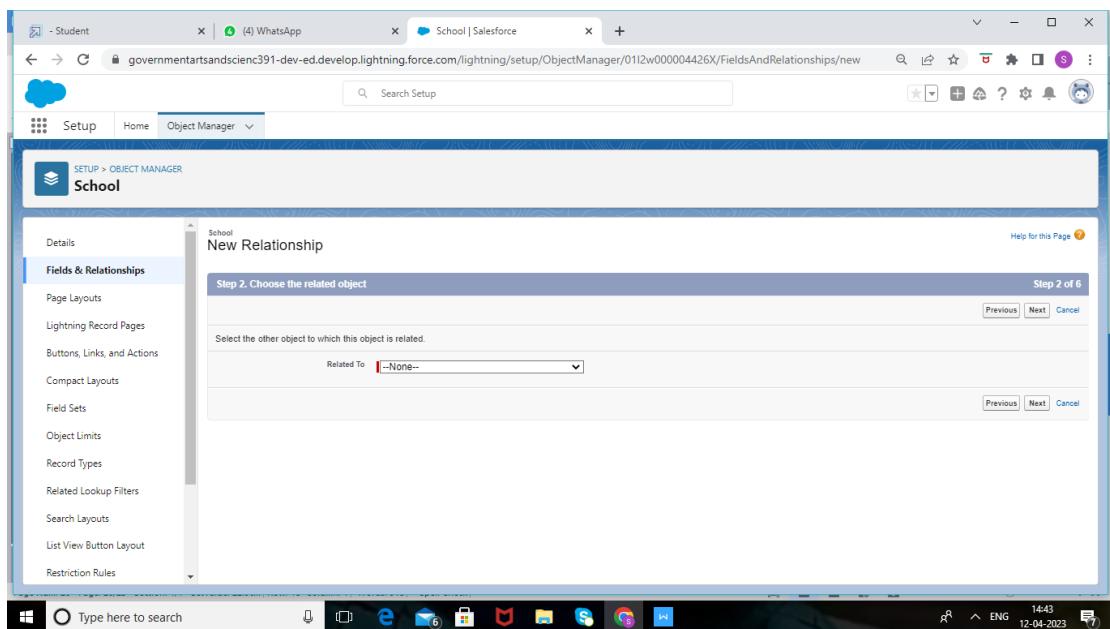
1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New

Let's create a master-detail relationship with school object

Select Master-Detail Relationship as the Data Type and click Next.



1. For Related to, enter School.



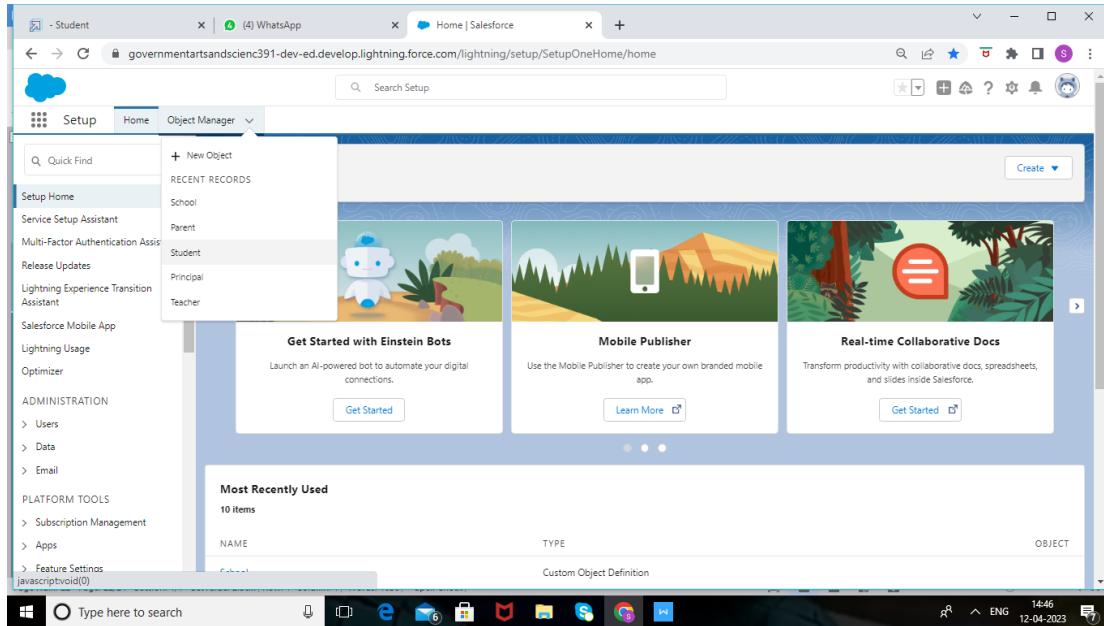
3. Click Next.

4. For Field Label, enter School.

5. Click Next, Next, Next and Save.

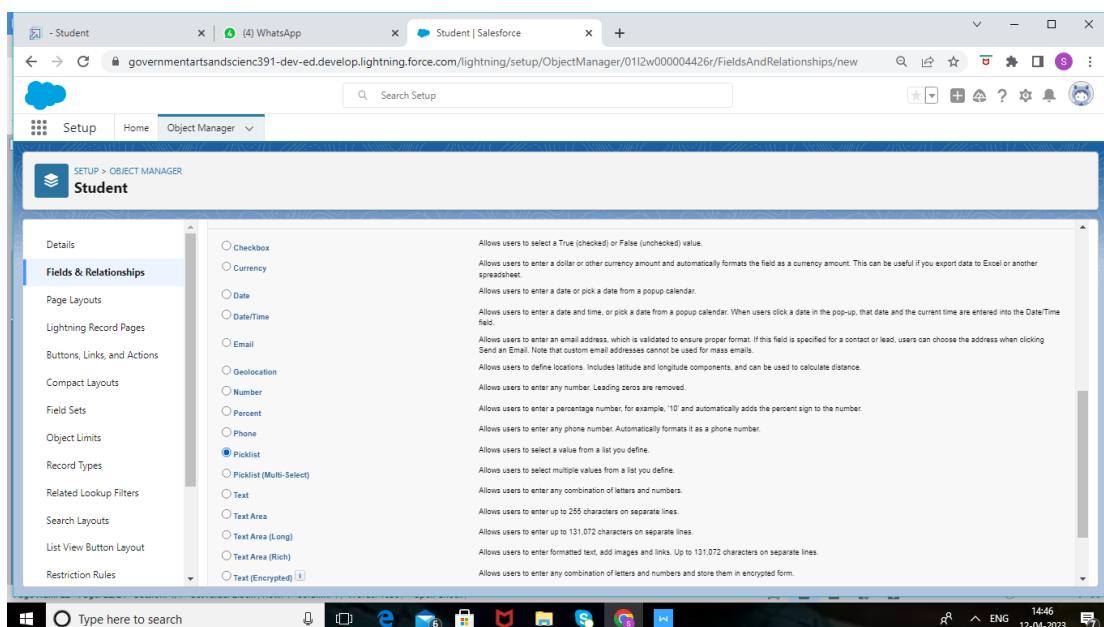
Lets create a Pick-List field:

1. From Setup, click Object Manager and select Student.



2. Click Fields & Relationships, then New.

3. Select Picklist as the Data Type and click Next

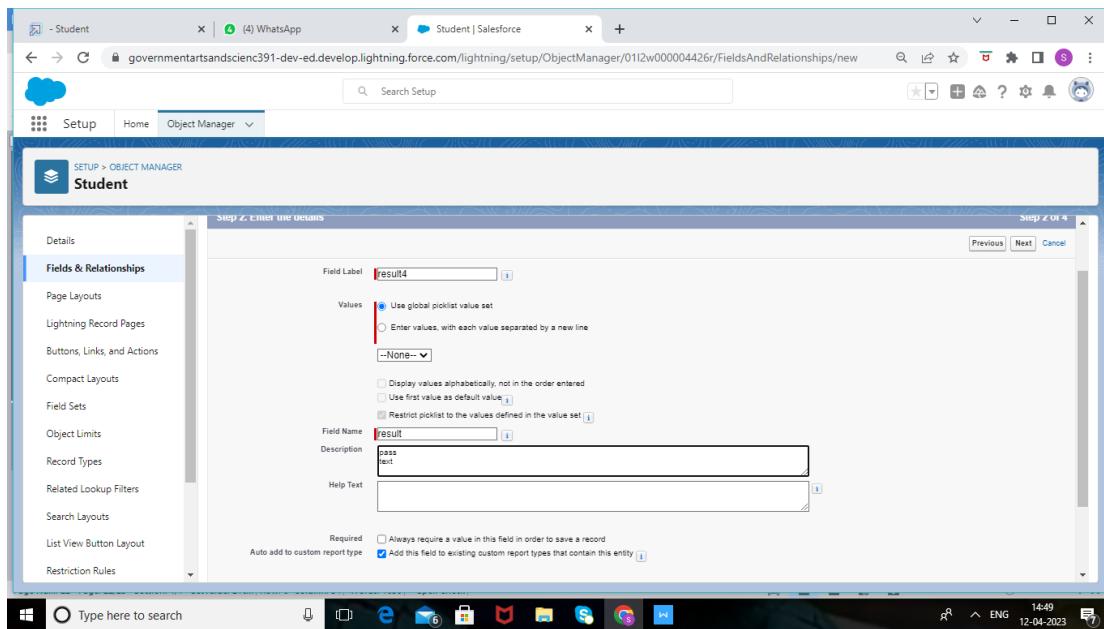


4. For Field Label enter Results.

5. Select Enter values, with each value separated by a new line and enter these values:

6. Pass

7. Fail



8. Click Next, Next, then Save & New

Lets create a Number field:

1. Select the Number as the Data Type, then click Next.

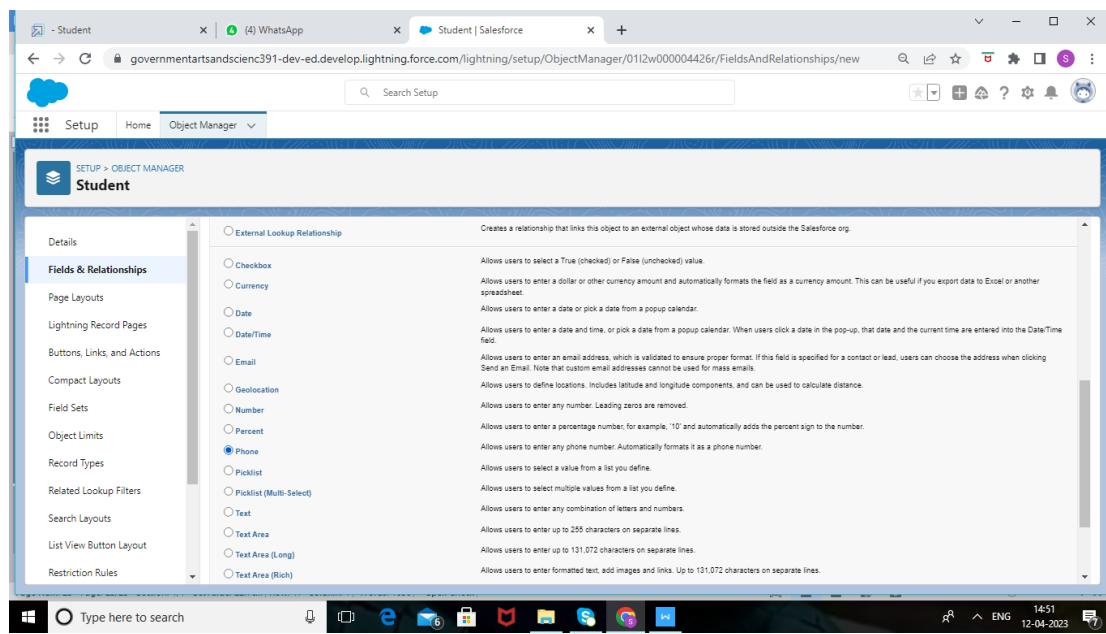
2. For Field Label, enter Class.

3. Click Next, Next, then Save & New

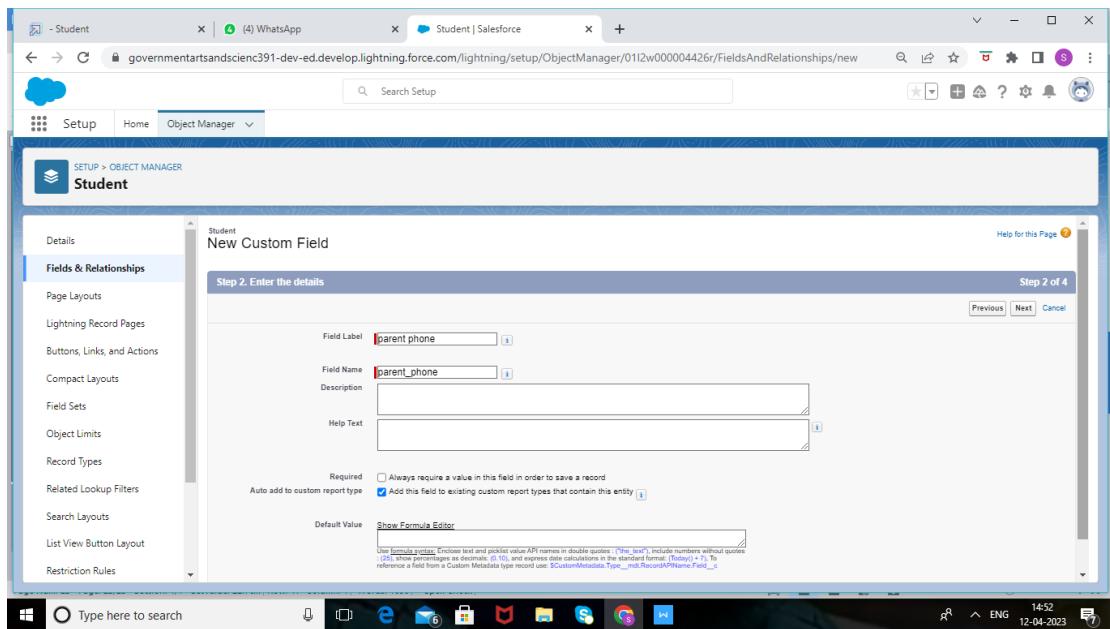
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

Creation Of Fields For The Parent Objects

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.
4. Select the Phone as the Data Type, then click Next.



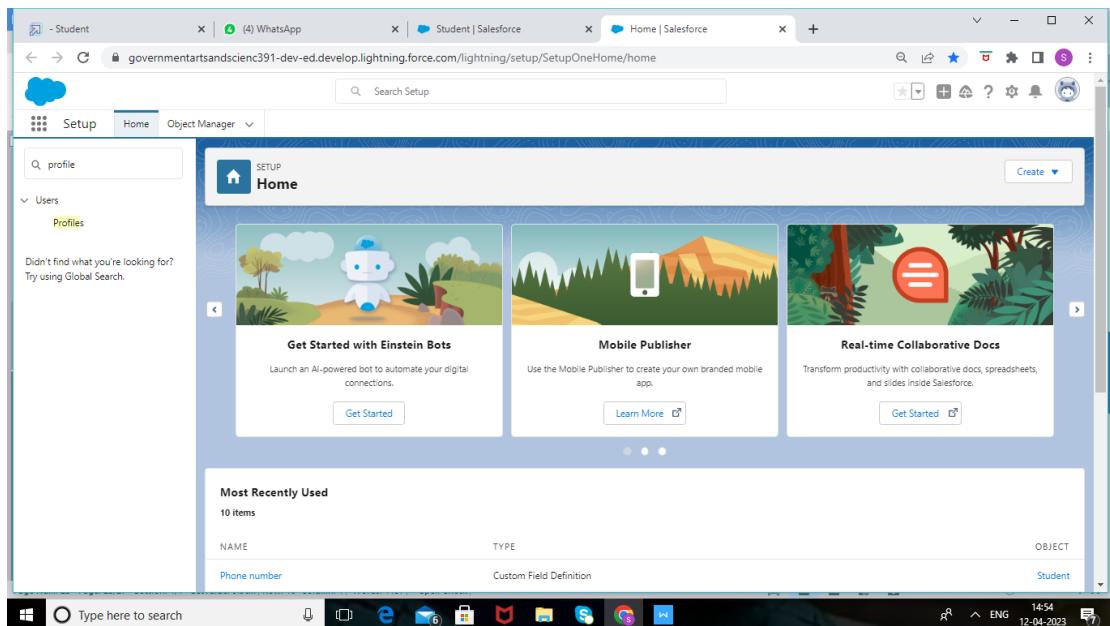
5. For Field Label, enter Parent Number.



6. Click Next, Next, then Save & New

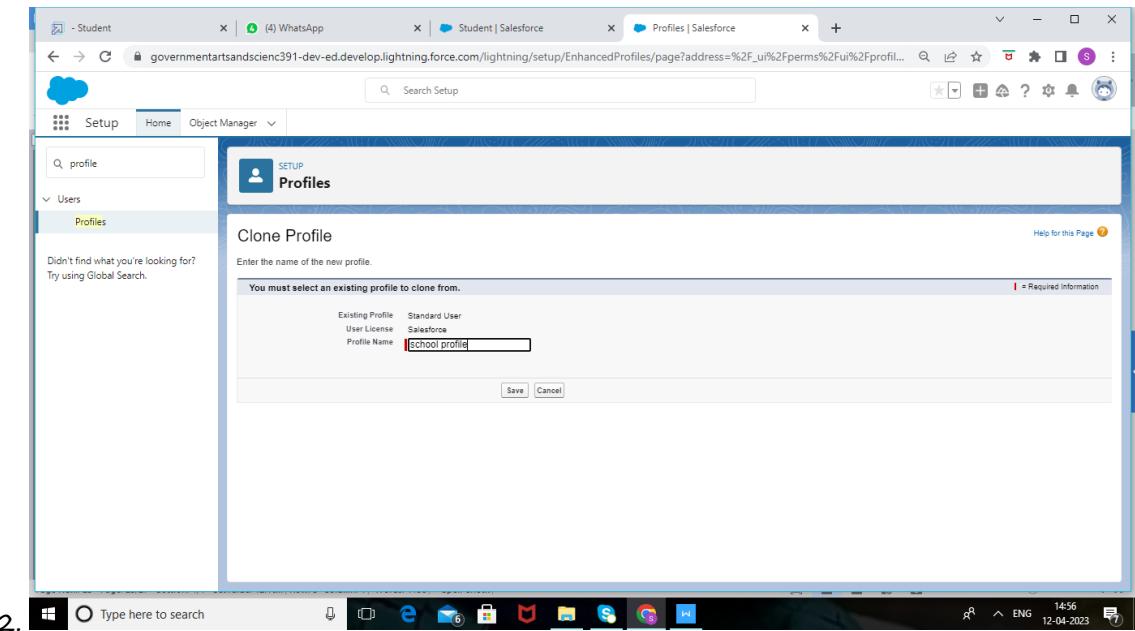
Creation On Profile

From Setup enter Profiles in the Quick Find box, and select Profiles.



From the list of profiles, find Standard User.

1. 2. Click Clone.

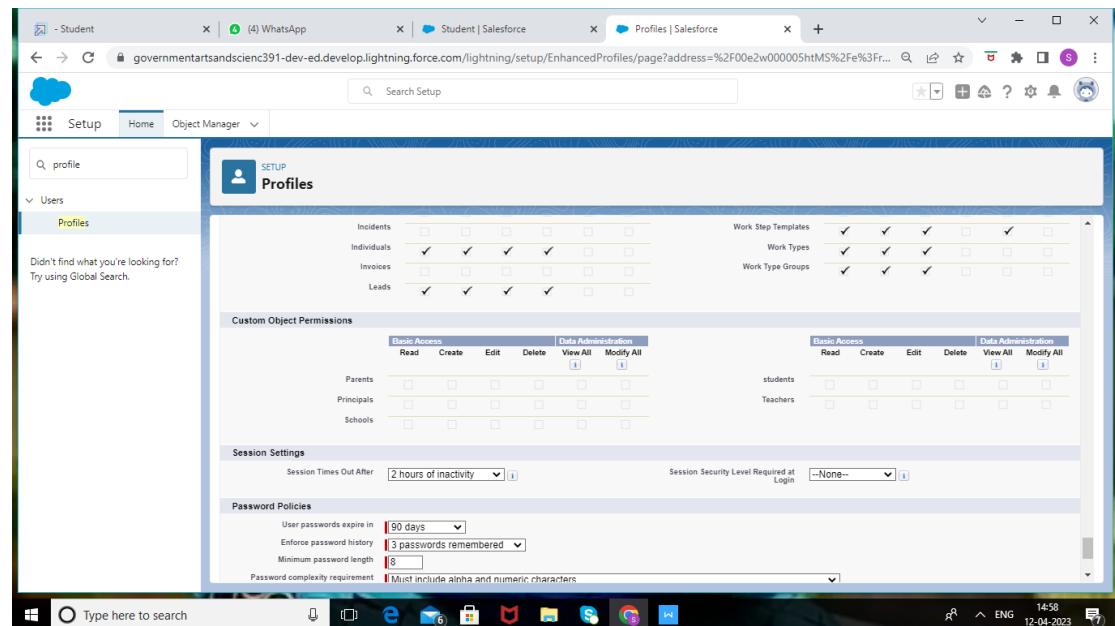


2.

3. For Profile Name, enter School profile.

4. Click Save.

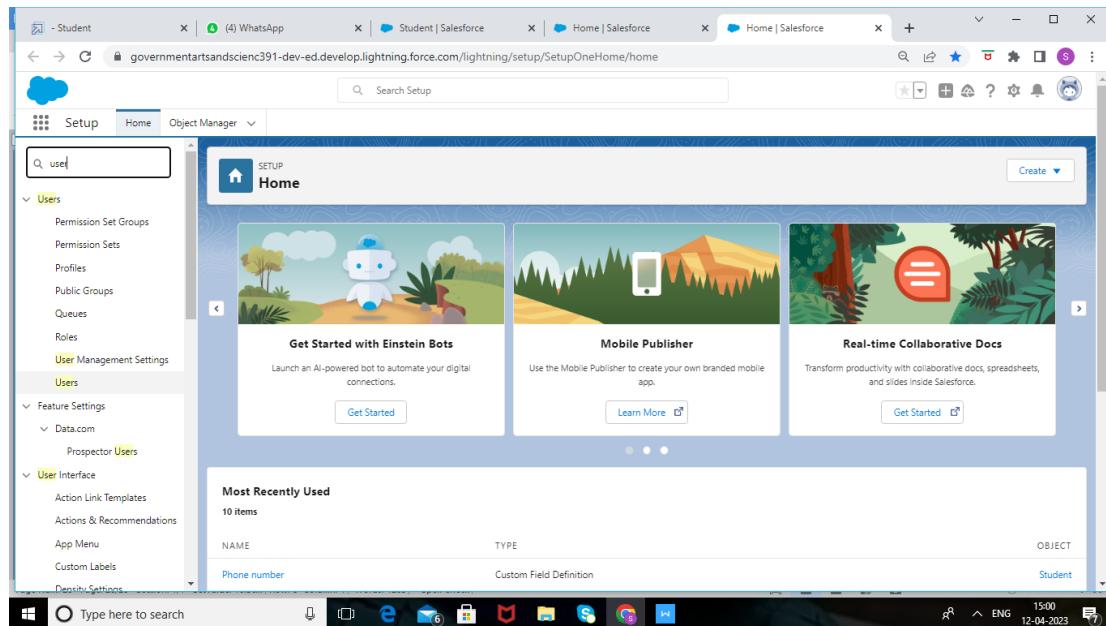
5. While still on the School profile page, then click Edit.



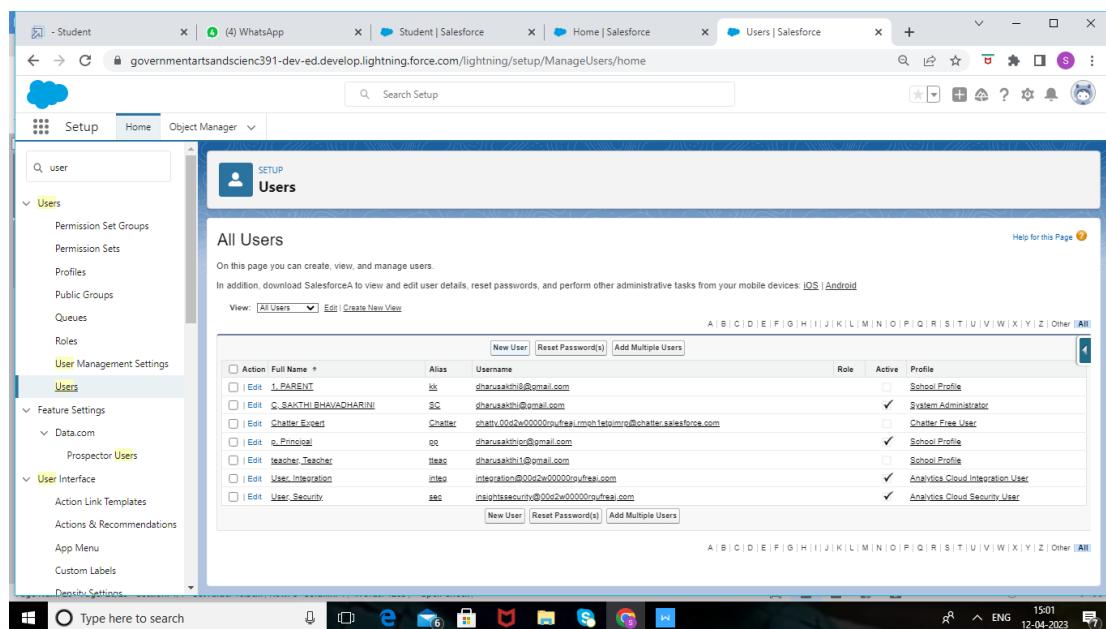
6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile.

Creating A Users

From Setup, in the Quick Find box, enter Users, and then select Users.



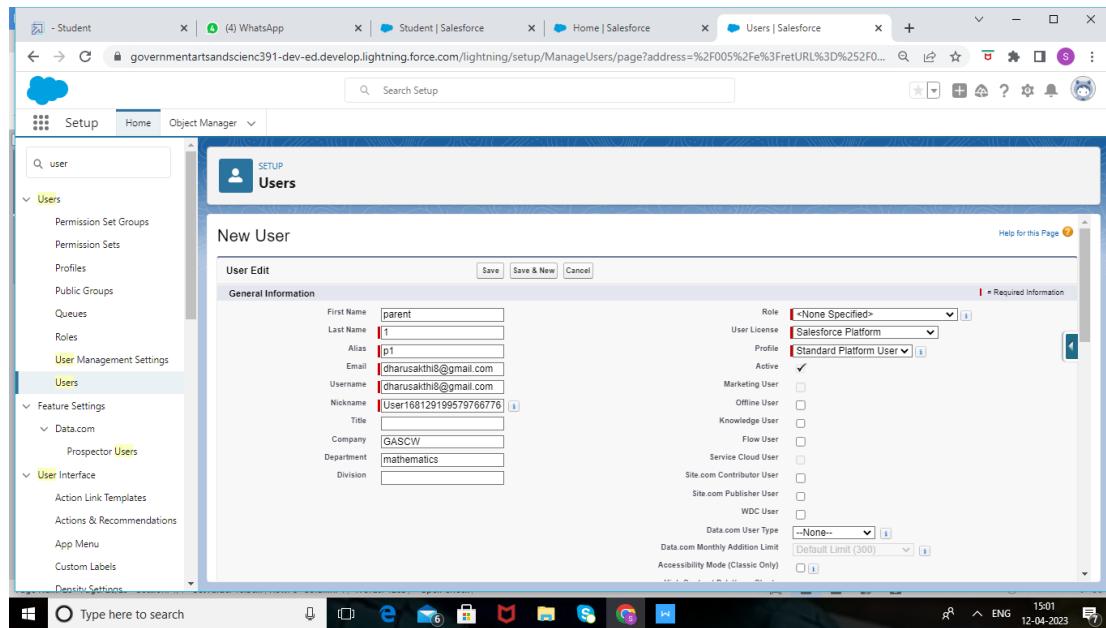
Click New User.



3. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.

4. Select a User License As salesforce.

5. Select a profile as a School profile.



6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

7. Similarly follow the above steps and create 3 users as Teachers and principals.

Permission Sets 1

From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.

The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar has 'permission' selected under 'Users'. The main area is titled 'Permission Sets' with a sub-header 'All Permission Sets'. It lists various permission sets with columns for Action, Permission Set Label, Description, and License. Examples include 'Buyer' (B2B Buyer Permission Set One Seat), 'CRM User' (CRM User), and 'Field Service Mobile Standard PermSet' (Field Service Mobile). A navigation bar at the bottom shows '1-25 of 27' and '0 Selected'. The status bar at the bottom right shows 'ENG 1504 12-04-2023'.

Click New.

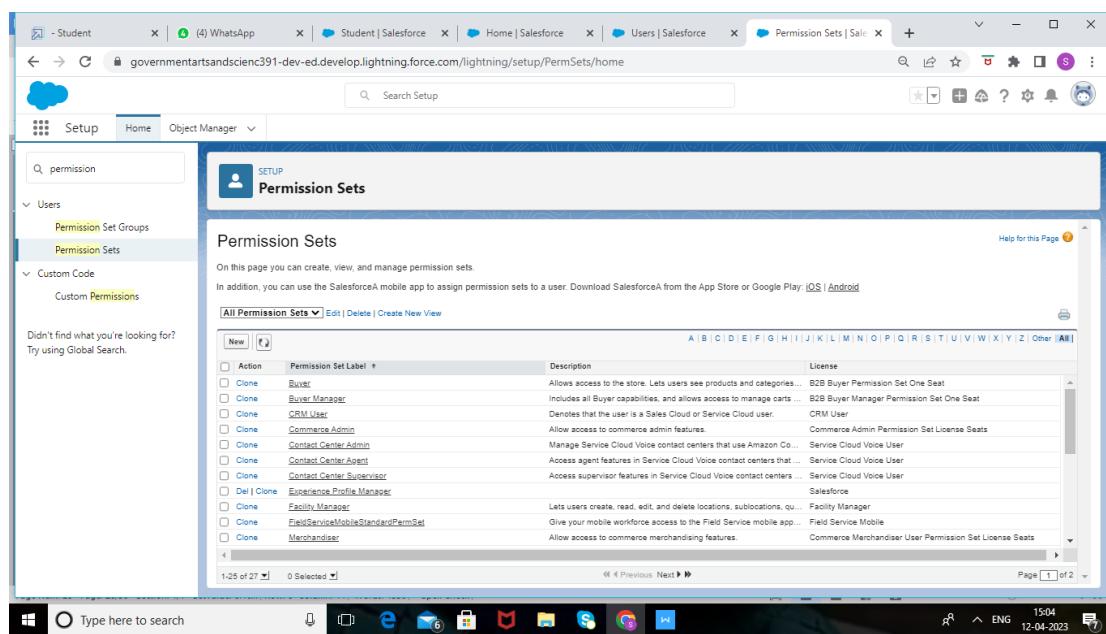
The screenshot shows the 'Permission Set Create' page. The left sidebar has 'permission' selected under 'Users'. The main area is titled 'Permission Set Create'. It has sections for 'Enter permission set information' (Label: 'teacher permission', API Name: 'teacher_permission', Description: empty) and 'Select the type of users who will use this permission set' (License: '--None--'). A note at the bottom says 'Not sure what a permission set license is? Learn more here.' The status bar at the bottom right shows 'ENG 1506 12-04-2023'.

3. Give the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user

Similarly follow the above steps for the permission set 2.

Permission Sets 2

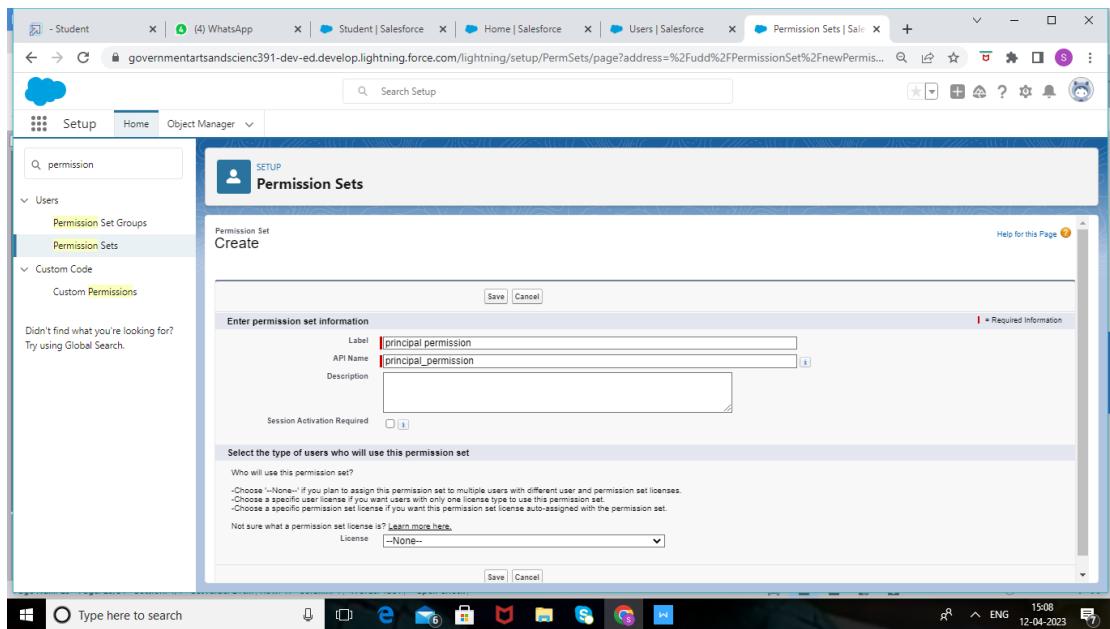
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar has 'permission' selected under 'Users'. The main area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table includes rows for various roles like Buyer, Buyer Manager, CRM User, etc. A navigation bar at the bottom shows '1-25 of 27' and '0 Selected'.

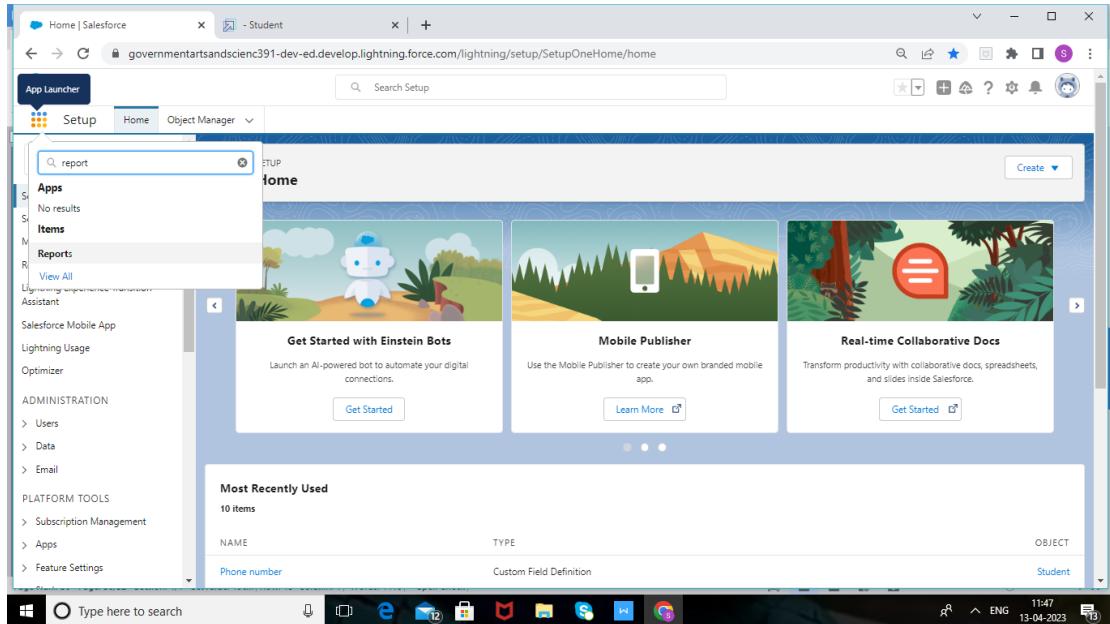
Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user...	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 Amazon Co...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers...	Service Cloud Voice User
<input type="checkbox"/>	Del Clone	Lets users create, read, edit, and delete locations, sublocations, qu...	Salesforce
<input type="checkbox"/>	Experience Profile Manager	Facility Manager	
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features...	Commerce Merchandiser User Permission Set License Seats
<input type="checkbox"/>	Merchandiser		

3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.



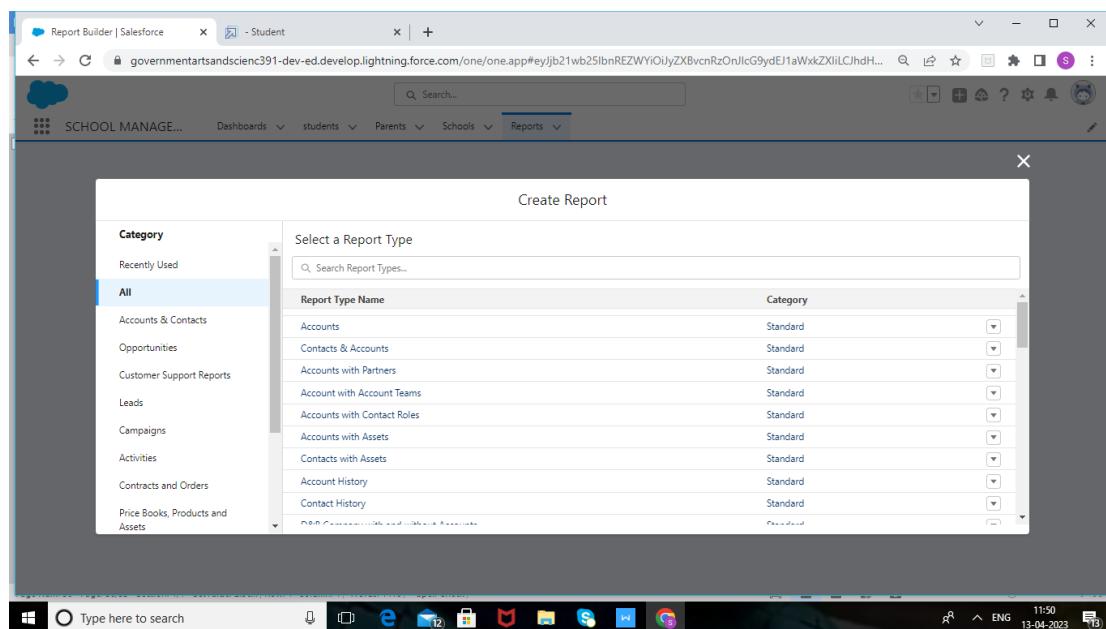
Reports

click appmanager ,choose report.



From the Reports tab, click New Report.

2. Select the report type as School with students and parents for the report, and click Create.



Create Report

Select a Report Type

Report Type Name: student

Category: Standard

Activities with students

Schools with students

Parents with Student

Details

Schools with students

Standard Report Type

Start Report

Created By You

No Reports Yet

Created By Others

No Reports Yet

Objects Used in Report Type

Student

3. Customize your report, then save or run it.

Report: Parents with School

New Parents with School Report

Total Records

5

	Parent: Parent Name	School: School Name
1	Arul	GASC HIGHER SECONDARY SCHOOL
2	Sakthivel	GASC HIGHER SECONDARY SCHOOL
3	Suresh	GASC HIGHER SECONDARY SCHOOL
4	Palani	GASC HIGHER SECONDARY SCHOOL
5	Vajiram	GASC HIGHER SECONDARY SCHOOL

School: School Name	Student: Student Name
1 GASC HIGHER SECONDARY SCHOOL	SUBASRI
2 GASC HIGHER SECONDARY SCHOOL	HAASINI
3 GASC HIGHER SECONDARY SCHOOL	NANDHINI
4 GASC HIGHER SECONDARY SCHOOL	PRAVEENA
5 GASC HIGHER SECONDARY SCHOOL	PAVITHRA

5 ADVANTAGES AND DISADVANTAGE

- CRM usage in higher education has a wide range of powerful benefits.
- Education CRM application are meant to automate and manage communication with students ,employees and in the school/institution.
- It enables schools to track interactions with students and their parents ,and provides a platform for personalized communication.
- With all data stored in one place,schools can gain valuable insights into student behaviour ,preferences, and trends.this information can be used to make informed

decisions about admission processes , student engagement , and resource allocation.

- Schools can also use the data to monitor students progress and identify areas for improvement.
- Tracking of school vehicles by parents .
- Communicating with teacher is more easier.
- It provides globalized and high competitive environment to students and parents.

Disadvantages

- Having lots of security concerns .
- Increased screen time for students and parents.
- Technology is good, but it is also distractive . students today are smart enough to find backdoors in school system to surf the web or play games instead of learning.
- There are many security issues , such as data loss and data being hacked by someone.

APPLICATIONS

Since CRM is a helpful software for businesses and customers, it is widely used in most industries apart from the ones listed above. Some of these include:

- Healthcare
- Agriculture
- E-commerce
- Legal industry
- Fitness industry
- Marketing
- Telecommunication
- Travel and tourism
- Real estate
- Call center

CONCLUSION

Today,a good customer relationship management(CRM) platform is the backbone of many successful student recruitment efforts.

A CRM system with a mobile application for a school.in the course of the work,the processes of modeling,building architecture,and implementation of web application functionality were described.

Customer relationship management solutions are required in the education sector to make fast, dynamic, and affordable solutions that make it easy for universities to handle daily activities. The CRM gives a proper understanding of the students and activities carried out in the university. It also lets students communicate with the university.

In a custom CRM for a university, students get information about enrollment, registration, financial help, accommodation, and so on. They are considered as the customers, and the goal is to provide top-quality services to students.

With CRM solutions, universities can manage their students effectively. CRM also collects the management records such as student attendance, course curriculum, extracurricular activity records, and so on. It also maintains data privacy by automating processes. By analyzing the CRM information, solutions to problems can be found.

A CRM increases productivity, allows communication between students and alumni, and reduces administrative tasks in the education industry. Eventually, it helps the institute to establish itself as a brand in the CRM.

A CRM is a customer - centric system that can help education professionals nurture relationships with prospects and enrollees, produce data-driven insights to illustrate progress towards goals, and streamline their admissions and marketing initiatives to save time and effort.

Schools apps adds flexibility to the learning process, mobile learning offers great opportunities for education, especially for teenagers, who show great attentiveness to mobile technologies.

