

## 1 INTRODUCTION

## 1.1 Overview

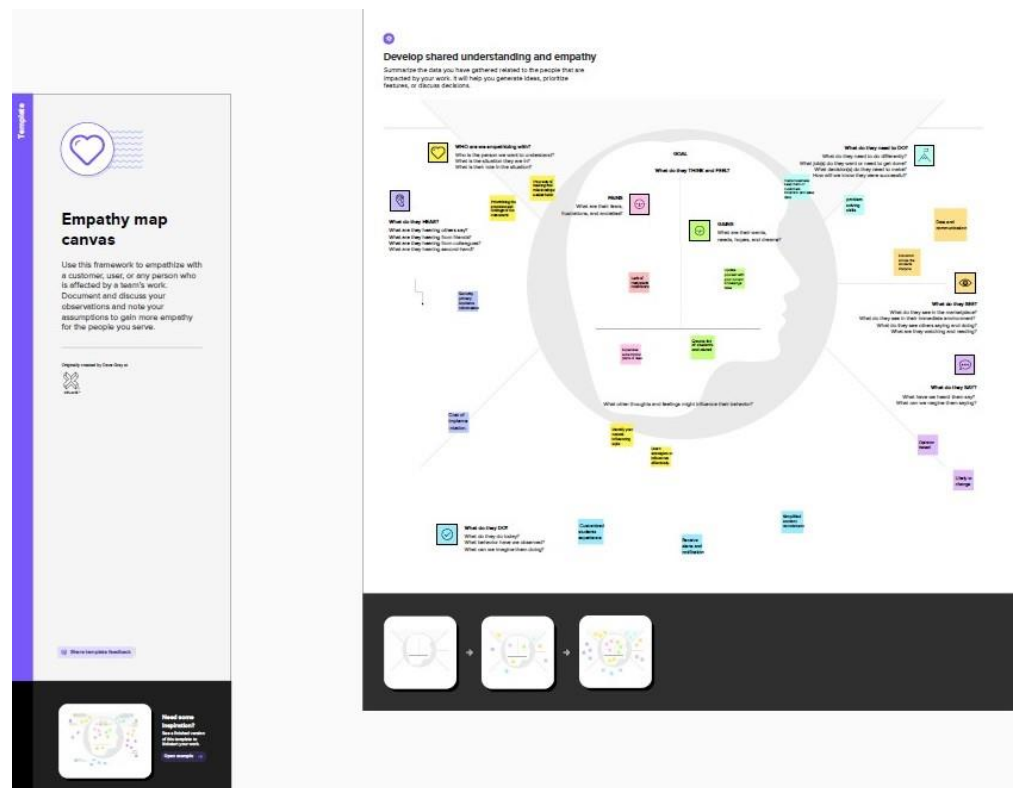
CRM (Customer Relationship Management) applications for schools/colleges are software systems designed to help educational institutions and manage relationships with their students, parents, alumni, and other stakeholders. These applications allow schools to collect and analyze data about these groups to improve engagement and communication.

## 1.2 Purpose

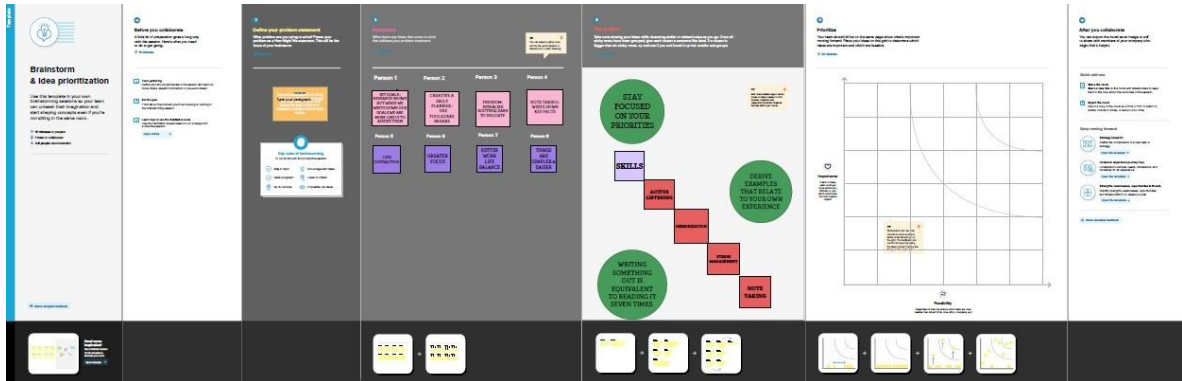
Customer Relationship Management (CRM) applications for schools/colleges serve the purpose of managing relationships and interactions with students, parents, alumni, and other stakeholders. These applications provide a comprehensive system for schools/colleges to manage and track interactions with their constituents and ensure that they are meeting their needs.

## 2 Problem Definition & Design Thinking

## 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



## 3 RESULT

### 3.1 Data Model:

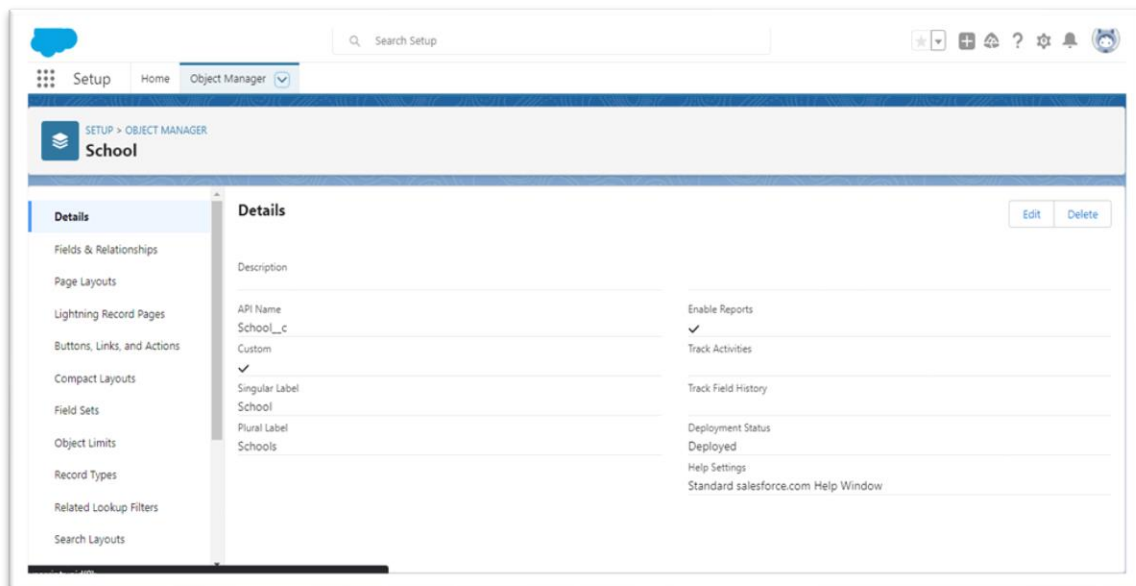
Object name	Fields in the Object	
School	Field label	Data type
	Address	Text Area
	District	Text Area
	State	Text Area
	School Website	Text Area
	Phone Number	Phone
	Number of Students	Roll – up summary
	Highest Marks	Roll – up summary
Student	Field label	Data type
	Phone Number	Phone
	School	Master – Detail Relationship
	Results	Pick List
	Class	Number
	Marks	Number

Parent		
	Field label	Data type
	Parent Address	Text Area
	Parent Number	Phone

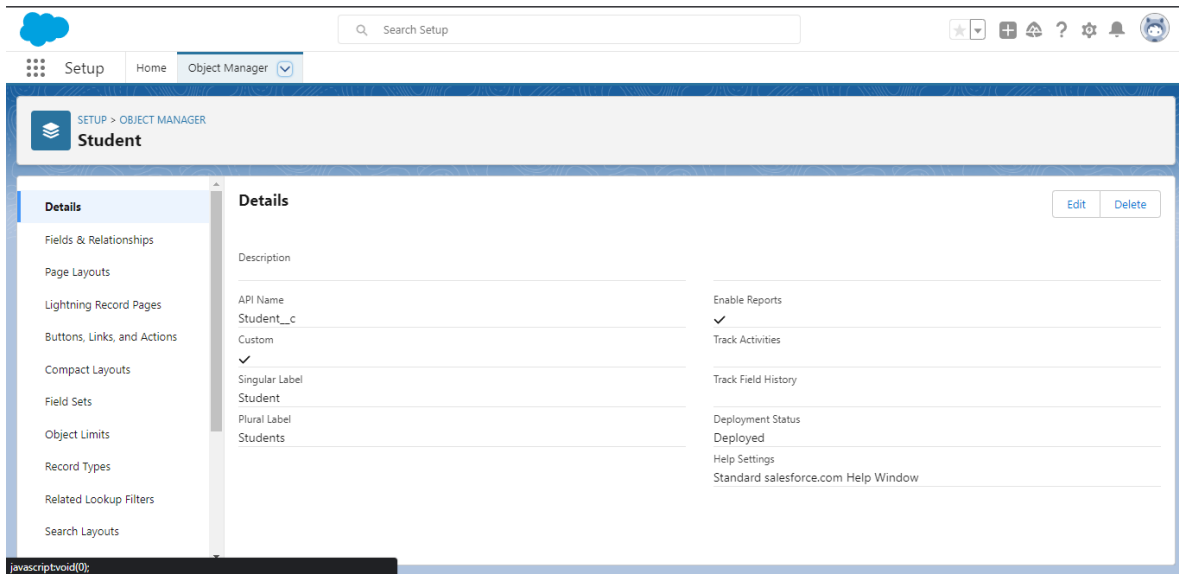
## 3.2 Activity & Screenshot

### ACTIVITY 1-OBJECT CREATION

#### SCHOOL:



## STUDENT:

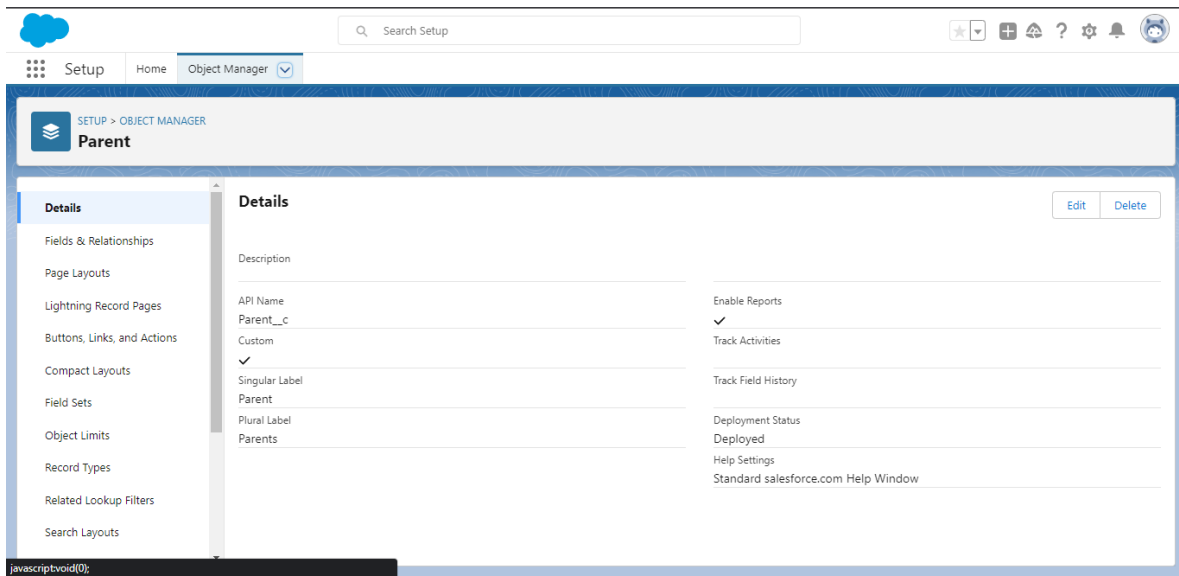


The screenshot shows the Salesforce Setup interface for the 'Student' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager' (selected). The main content area is titled 'SETUP > OBJECT MANAGER Student'. On the left, a sidebar lists various configuration options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section on the right contains the following information:

Details	
Description	
API Name	Student__c
Custom	✓
Singular Label	Student
Plural Label	Students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

## PARENT:



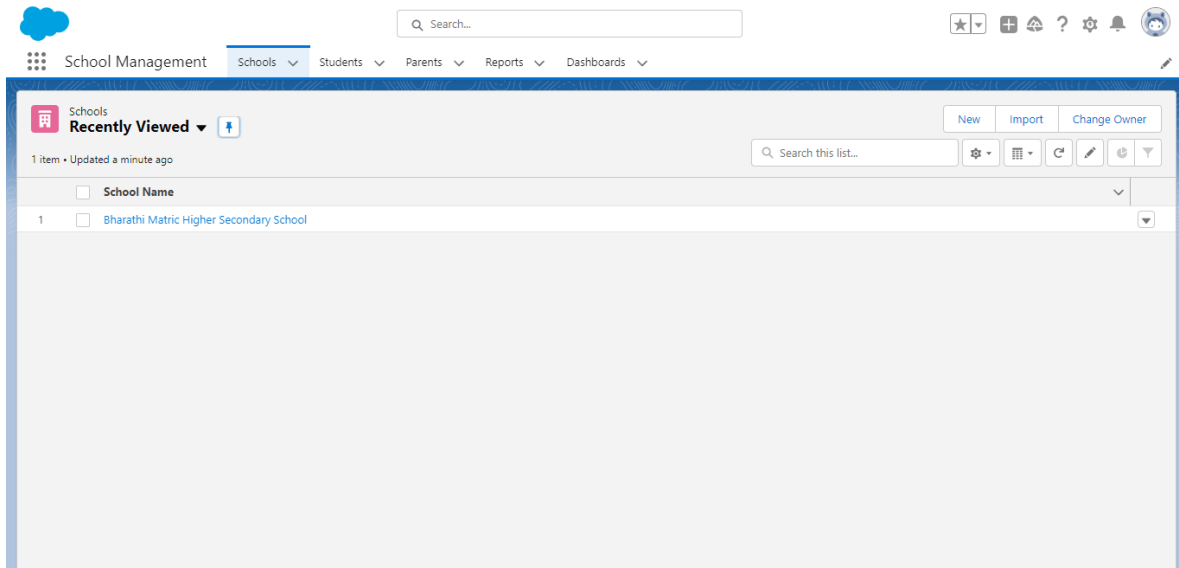
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager' (selected). The main content area is titled 'SETUP > OBJECT MANAGER Parent'. On the left, a sidebar lists various configuration options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section on the right contains the following information:

Details	
Description	
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

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

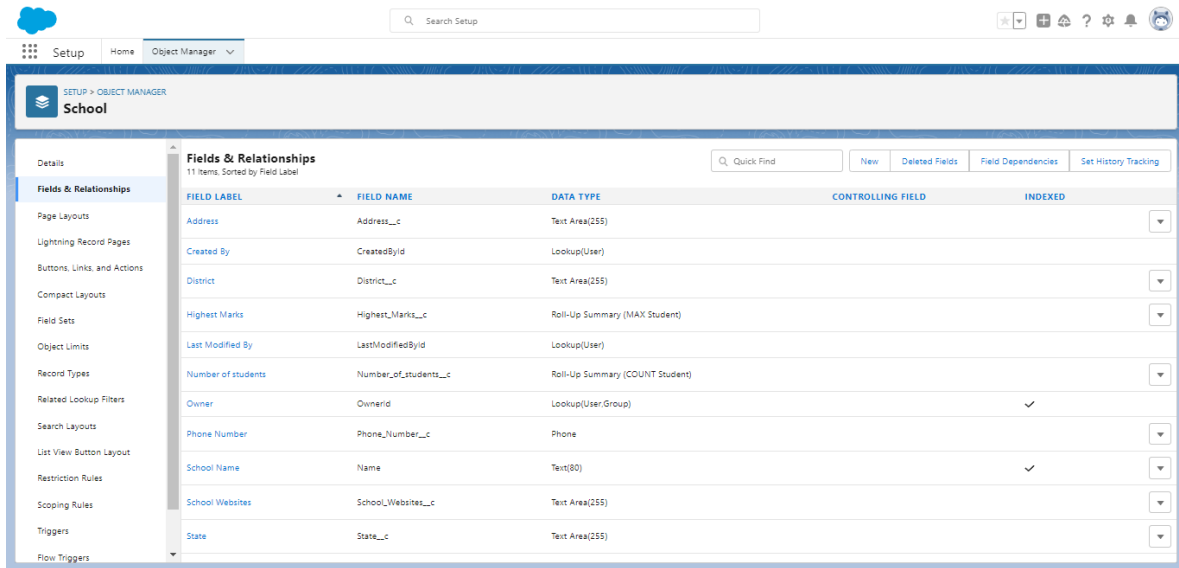
## ACTIVITY 2:

### LIGHTING APP:



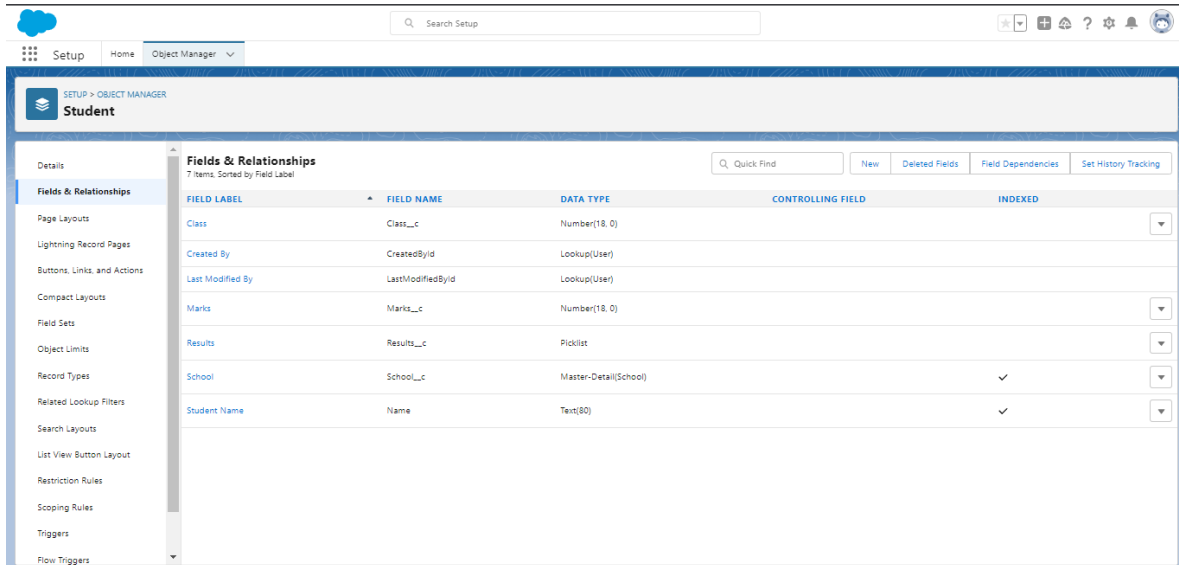
## ACTIVITY 3:

### FIELDS AND RELATIONSHIP FOR SCHOOL OBJECT:



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School Websites	School_Websites__c	Text Area(255)		
State	State__c	Text Area(255)		

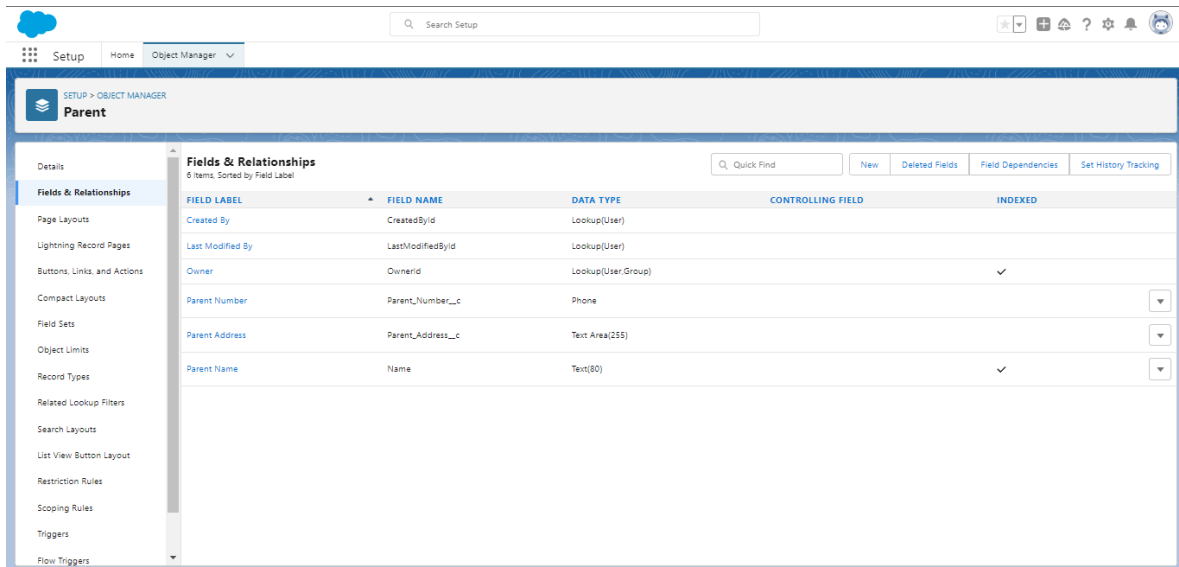
## FIELDS AND RELATIONSHIPS FOR STUDENT OBJECT:



The screenshot shows the 'Student' object configuration page under 'Object Manager'. The 'Fields & Relationships' tab is active, displaying a table of 7 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Class, Created By, Last Modified By, Marks, Results, School, and Student Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

## FIELDS AND RELATIONSHIP FOR PARENT OBJECT:



The screenshot shows the 'Parent' object configuration page under 'Object Manager'. The 'Fields & Relationships' tab is active, displaying a table of 6 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Last Modified By, Owner, Parent Number, Parent Address, and Parent Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Parent Number	Parent_Number__c	Phone		
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓

**USER:**

## ACTIVITY 5:

## REPORTS:

[illegible]

#### 4 Trailhead Profile Public URL

<https://trailblazer.me/id/a20bma115>

<https://trailblazer.me/id/abi35>

<https://trailblazer.me/id/b20bma102>

## CRM Application for Schools/Colleges

**BABU B-**

[https://trailblazer.me/  
id/b20bma119](https://trailblazer.me/id/b20bma119)



## 4 ADVANTAGES

- Improved Communication  
Personalization
- Streamlined Processes
- Data Analytics
- Improved Student Retention

The areas where this solution can be applied

## 4 DISADVANTAGES

- Cost
- Complexity
- Data privacy
- Resistance to change
- Overemphasis on metrics
- Risk of data silos

## 5 APPLICATION

- Student Recruitment
- Admissions Management
- Student Engagement
- Fundraising
- Alumni Relations
- Faculty/Staff Management

## 6 CONCLUSION

CRM applications for schools and colleges are designed to help institutions manage their relationships with students, parents, and other stakeholders. These applications typically include features for managing student information, tracking enrollment and admissions, managing financial aid and scholarships, and communicating with students and parents. They may also include tools for tracking student performance, managing schedules and calendars, and providing analytics and reporting on student and institutional data. Some of the key benefits of CRM applications for schools and colleges include increased efficiency, improved communication, and better student outcomes.

## 7

### **FUTURE SCOPE**

Customer Relationship Management (CRM) applications for schools and colleges have a promising future. With the increasing demand for personalized education, CRM applications can help educational institutions to manage relationships with their students, faculty, and other stakeholders effectively. These applications can assist in tracking student progress, managing communication with parents and alumni, and automating administrative tasks such as scheduling and record-keeping. Moreover, with the integration of artificial intelligence and machine learning, CRM applications can provide valuable insights to improve student engagement and learning outcomes. As educational institutions continue to prioritize student success, CRM applications will play an essential role in enhancing the overall educational experience.