A CRM Application for Schools (or) Colleges

INTRODUTION

1.1 Overview

Project Description

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

What I'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Profile
4. Users
5. Reports
6. Permission sets
7. Reports

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.

In the right hands, this is a tool with immense value. For those who are new to the concept of CRM, though, or are in the process of adopting and exploring CRM platforms, it may not be readily apparent exactly how to harness the power of this type of system.

1.2 Purpose

To help you take the right decision in choosing a CRM for your educational organisation, here we have devised the top 10 benefits of using a purpose-built CRM in the education industry.

i. **Improved Enrolments:** A CRM system can help counsellors/ sales representatives to more effectively manage and track leads, resulting in improved overall efforts and increased enrolment numbers.
ii. **Personalised Communication:** A CRM system allows educational institutions to personalise communication with leads/ prospects or students, resulting in more effective communication and better relationships.

iii. **Lead Management:** Educational organisation to more effectively manageleads,includingleadscoring, segmentation, and personalized follow-up.

iv. **Automated Communication:** Automating communication works wonders for educational organisation, thus, it is one of the most beneficial features of CRM in the Education Industry. It allows counsellors/ sales representatives to communicate with leads and students, to keep them engaged and interested over time

v. **Data-drivendecisionmaking:** ACRMsystemprovides counsellors/ sales representatives with the data they need to make informed decisions about recruitment, marketing, and other vital areas.

vi. **Improved student engagement:** CRMs help in improving student engagement by tracking student interactions and providing personalised communication.

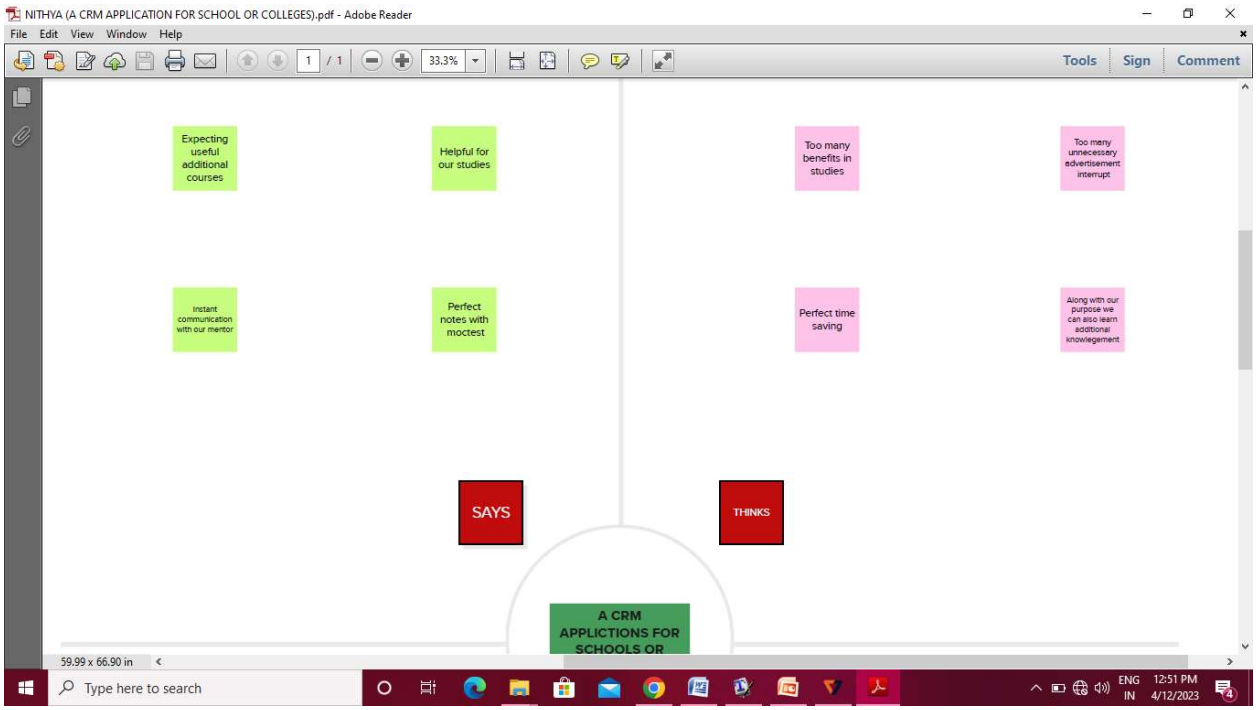
vii. **Better Communication:** One of the most beneficial reasons to use CRM in education industry is that it improves communication between different departments within an educational institution, helping to increase efficiency and collaboration.

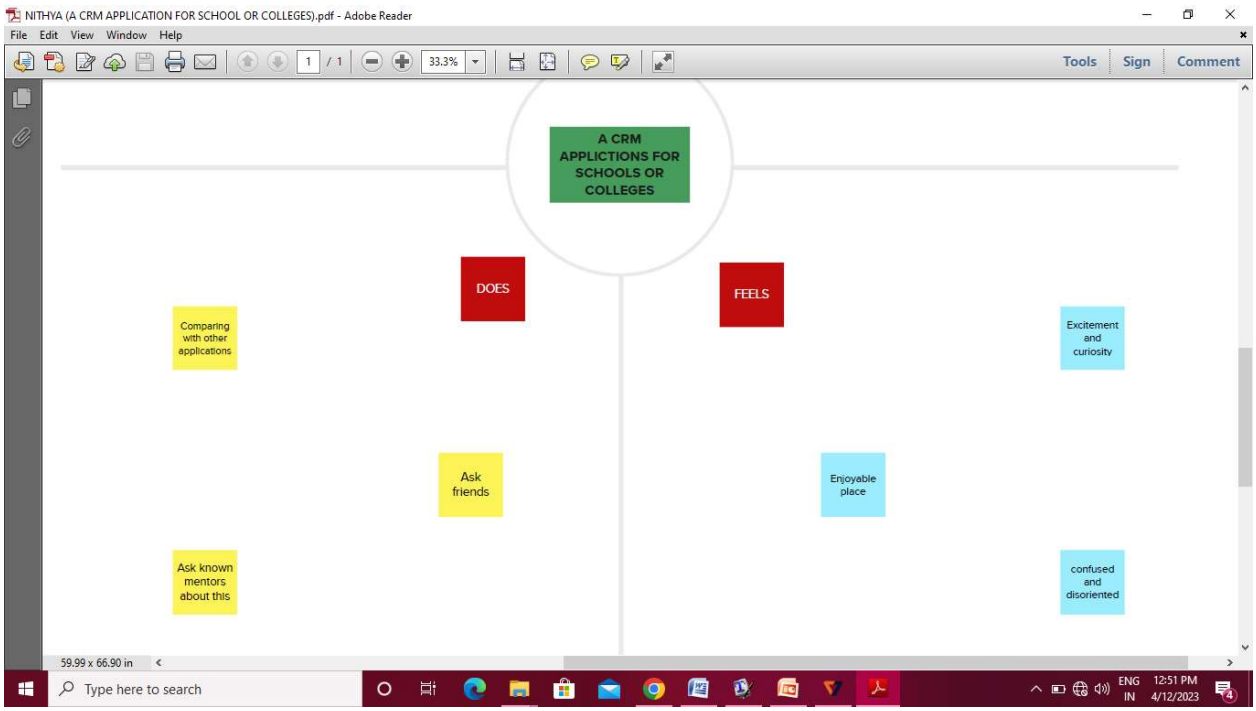
viii. **Increased Revenue:** By improving enrolment and student engagement, a CRM system can help educational organisation in increasing revenue.

Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making.

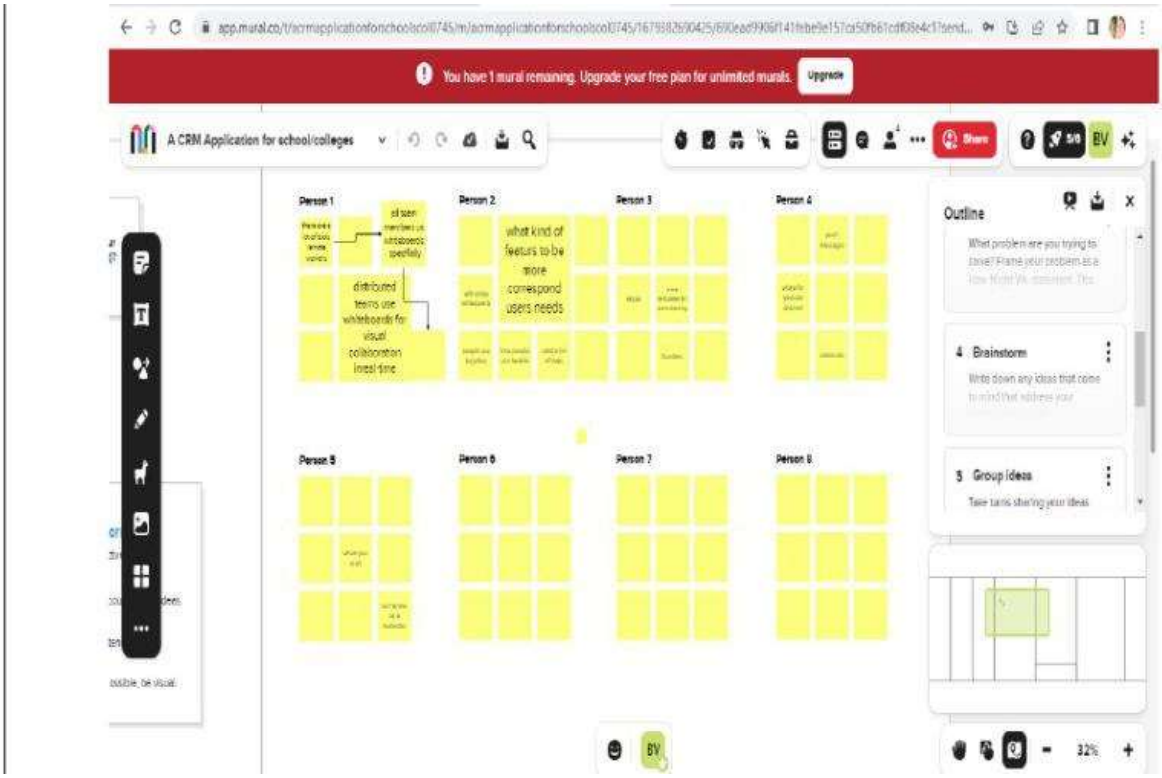
Problem Definition & Design Thinking

2.1 Empathy map





2.2 Ideation & Brainstorming map



3.1 Data Model:

<table>
<tr><th>Object Name</th><th>Fields in the object</th></tr>
<tr><td>Object 1

School</td><td>
<table>
<tr><th>Field Label</th><th>Data Type</th></tr>
<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 websites</td><td>Text area</td></tr>
</table>
</td></tr>
<tr><td>Object 2

Student</td><td>
<table>
<tr><th>Field Label</th><th>Data Type</th></tr>
<tr><td>Phone Number</td><td>Phone</td></tr>
<tr><td>Results</td><td>Picklist</td></tr>
<tr><td>Class</td><td>Number</td></tr>
<tr><td>Marks</td><td>Number</td></tr>
</table>
</td></tr>
</table>

Object 3

Parent

Field Label	Data Type
Parent Address	Text Area
Parent Number	Phone

3.1 Activity and screenshot:

Milestone-2: Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Activity-1: Creation of School Object

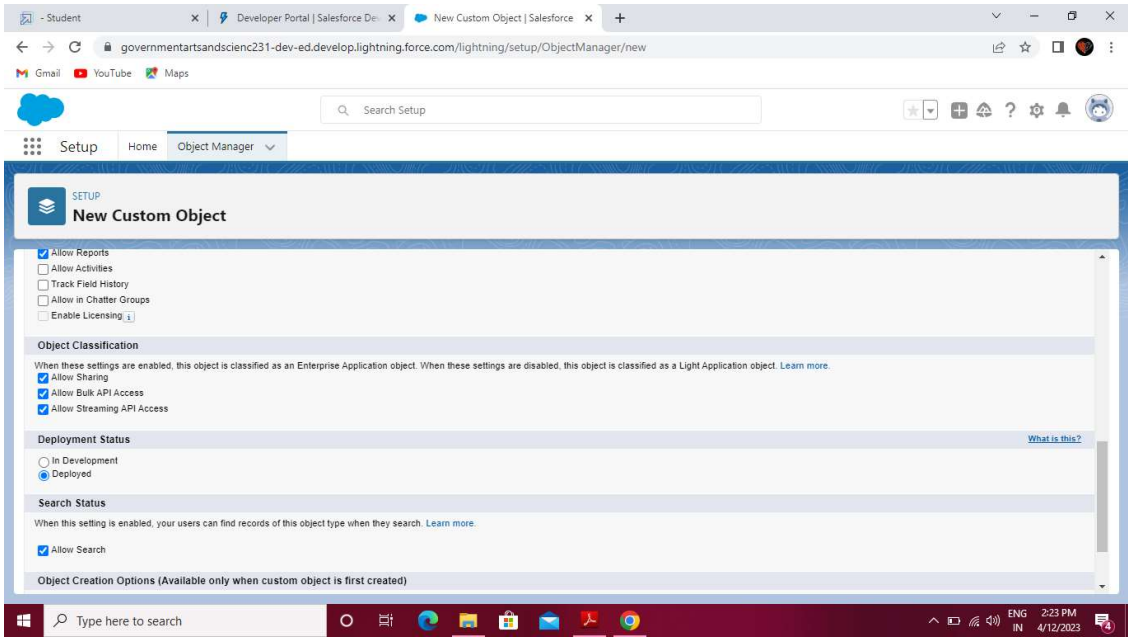
Creation of Objects for School Management:
For this school management we need to create 3 objects i.e. school, parents and students. The below steps will assist you in creating those objects.
1. Click on the gear icon and then select Setup

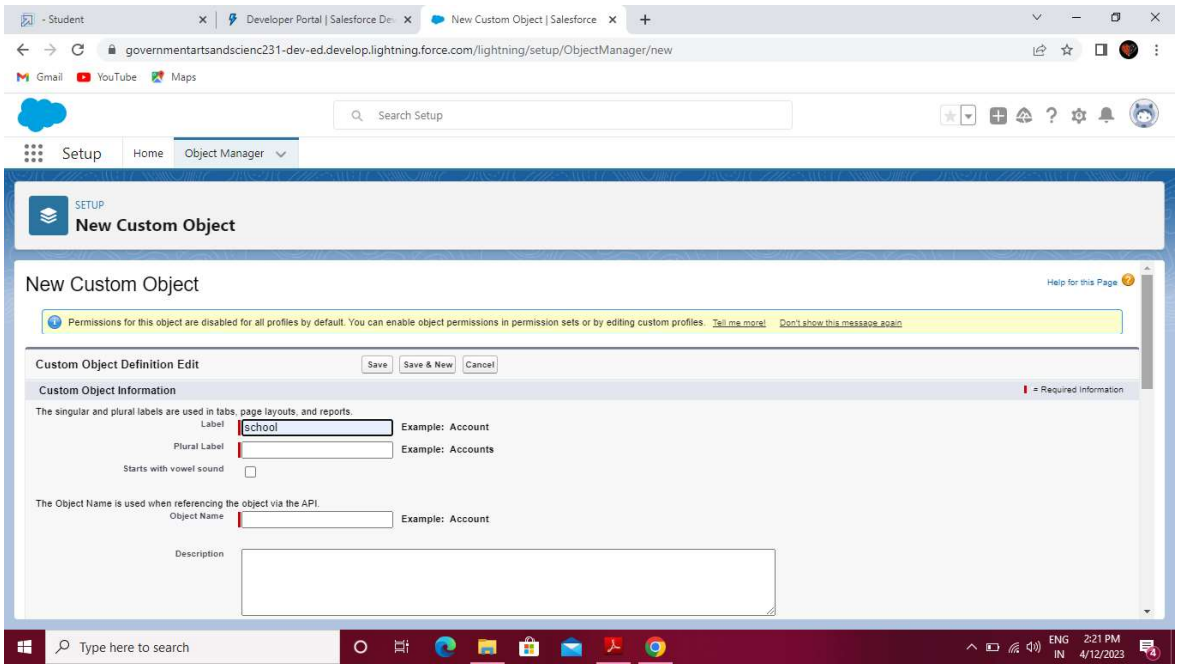
2. 2. Click on the object manager tab just beside the home tab.

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.

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

- Plural Label: Schools
- Record Name: School Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.





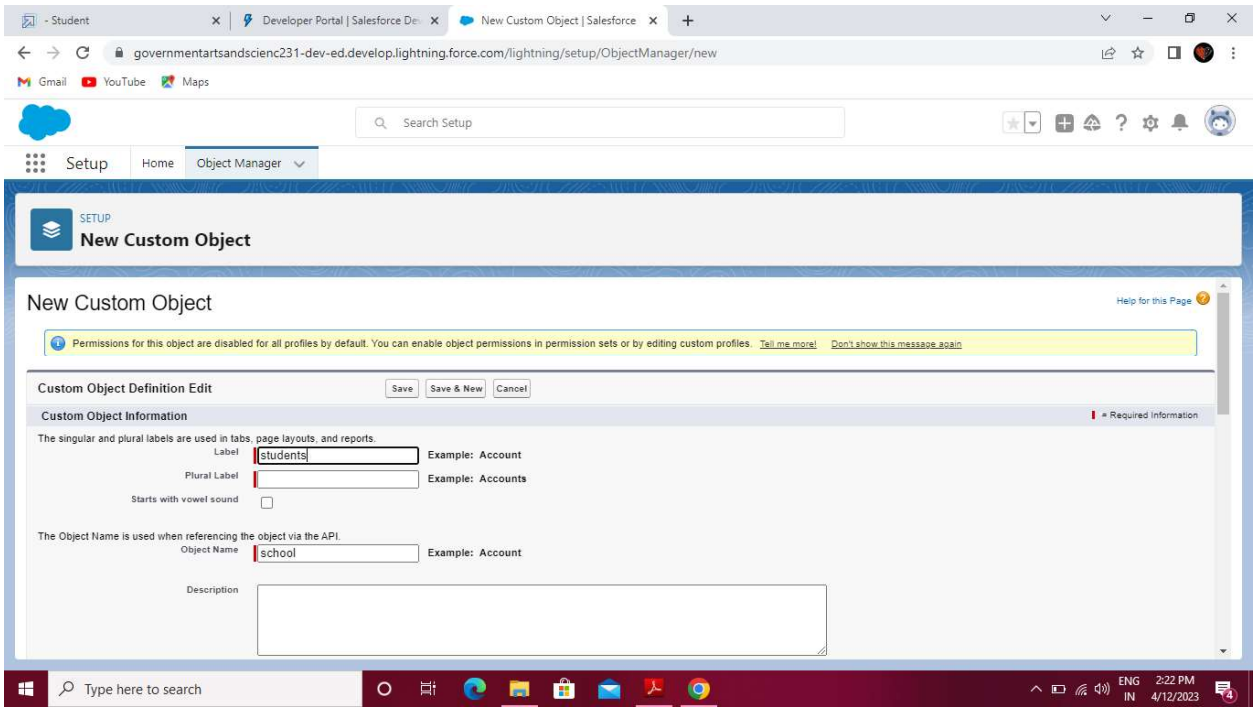
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.
1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.
In the same way create other objects such as students and parents

Activity 2: Create student object

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.

- On the Custom Object Definition page, create the object as follows:
- Label: Students
- Plural Label: Students
- Record Name: Student Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save. Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Object Tabs, click New.
1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.


- Student
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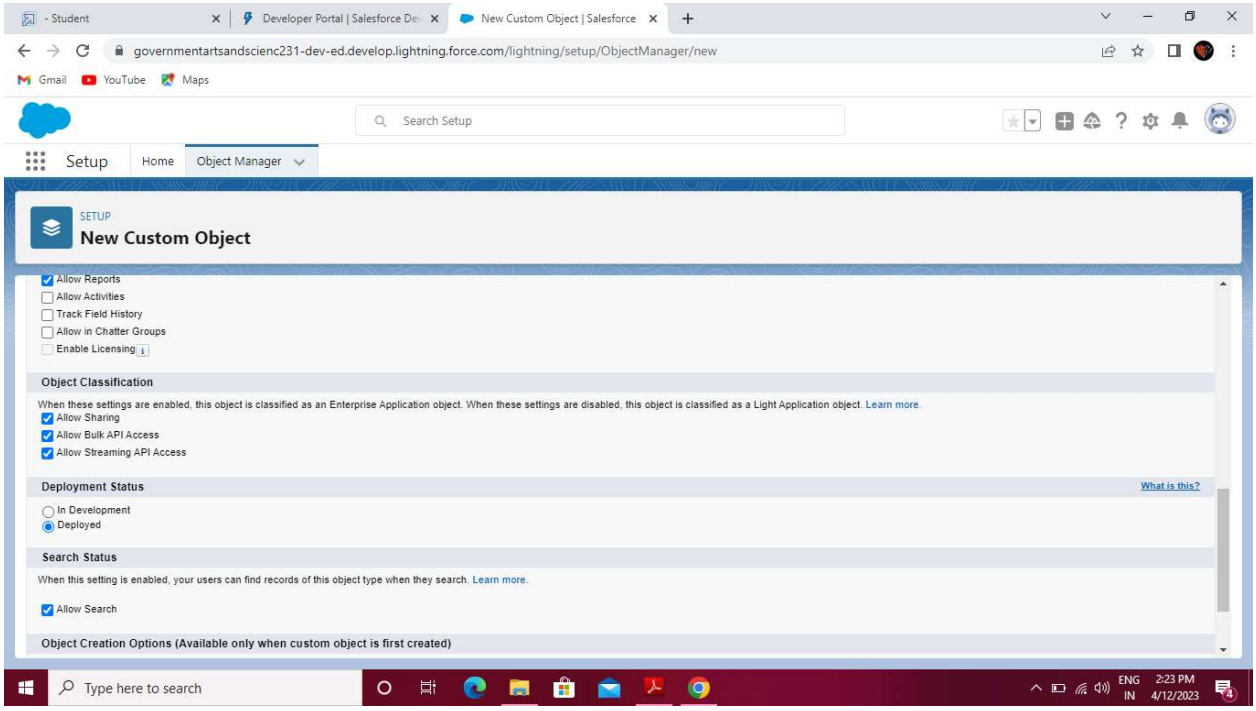
New Custom Object | Salesforce
governmentartsandscienc231-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles 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
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
students
Example: Account
Plural Label
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
school
Example: Account
Description
Type here to search
ENG
IN
2:22 PM
4/12/2023


- Student
Developer Portal | Salesforce De
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Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Object Creation Options (Available only when custom object is first created)
Type here to search
ENG
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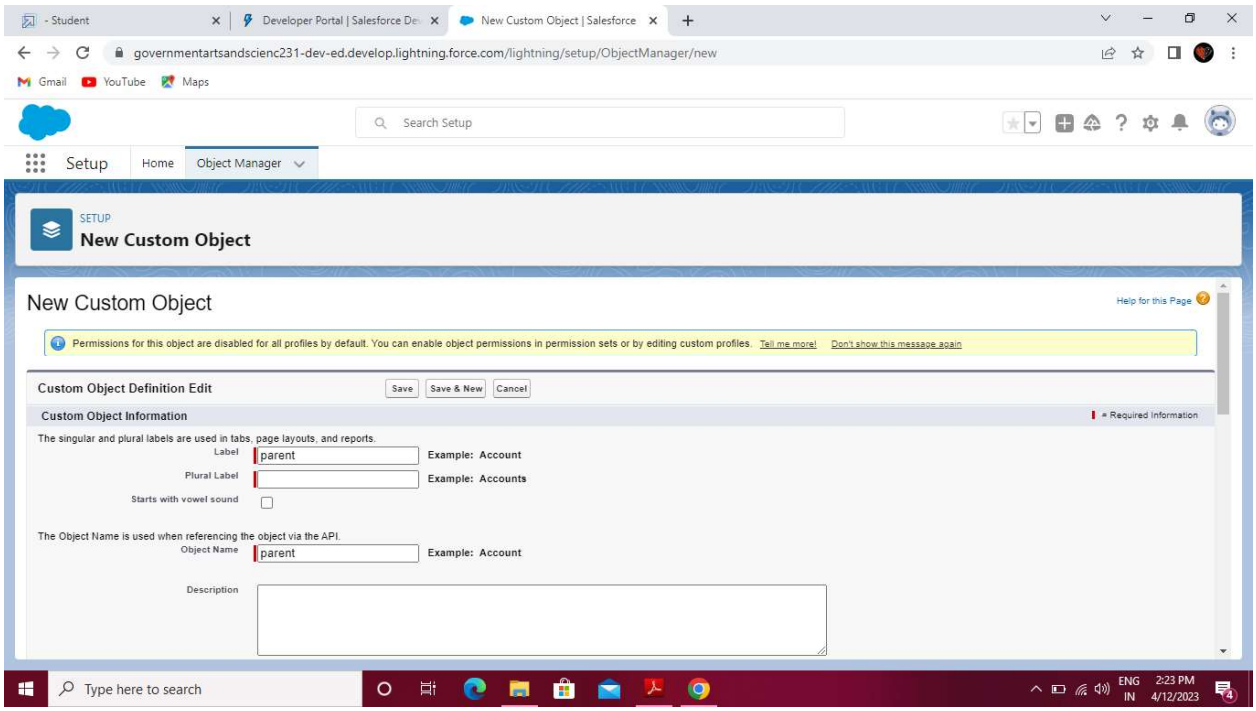
2:23 PM
4/12/2023

Activity 3: Create parent object

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.

- On the Custom Object Definition page, create the object as follows:
- Label: Parent
- Plural Label: Parents
- Record Name: Parent Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.
1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.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Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
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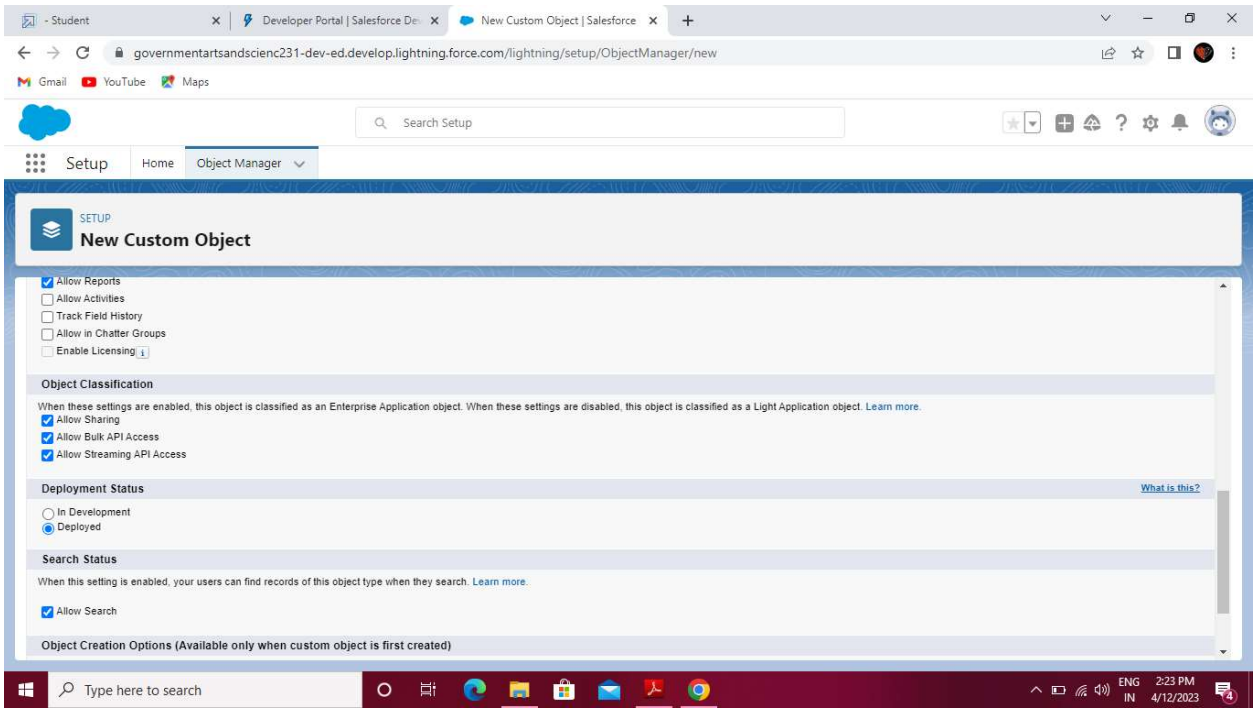
4/12/2023


governmentartsandscienc231-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
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New Custom Object
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
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Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
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When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Object Creation Options (Available only when custom object is first created)
Type here to search
ENG
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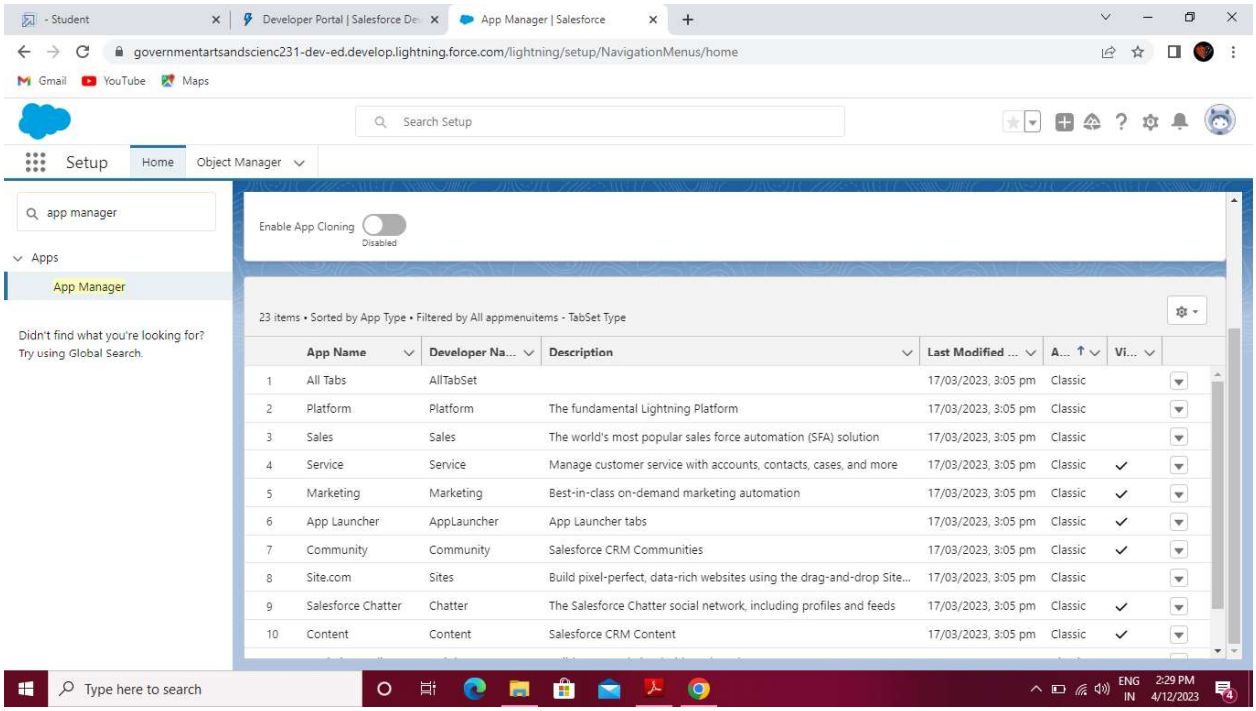
Milestone-3: Lightning App

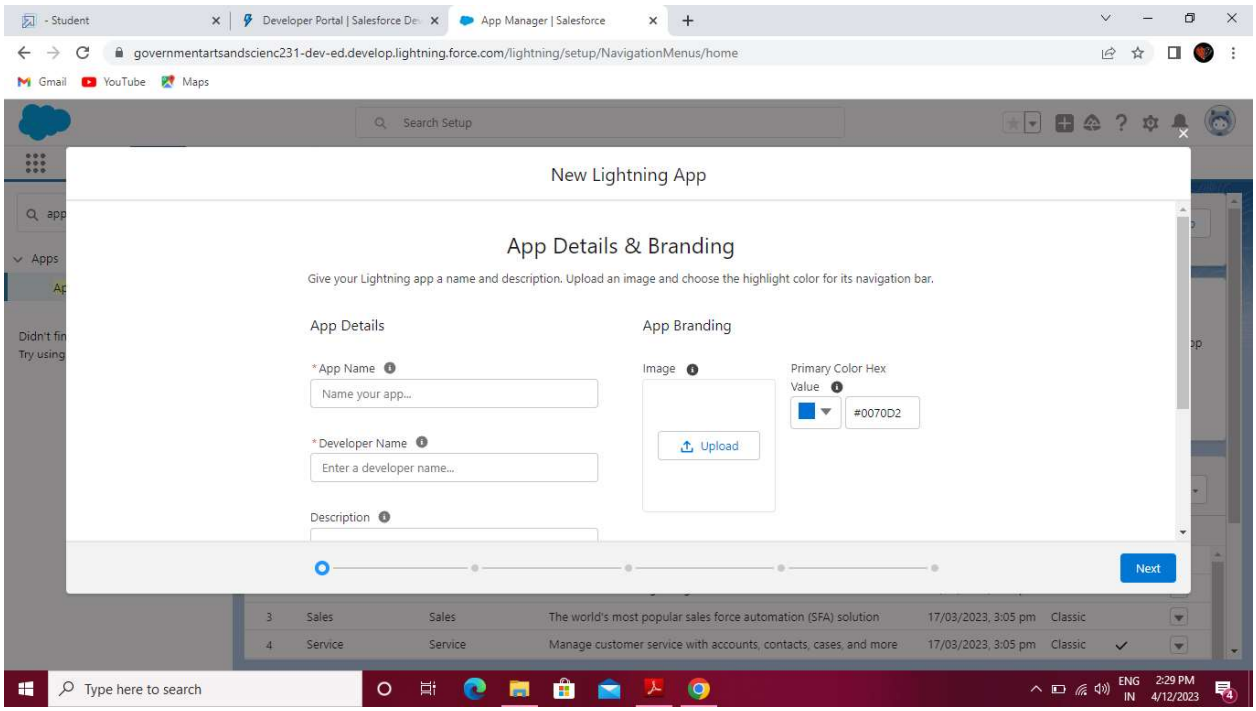
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs



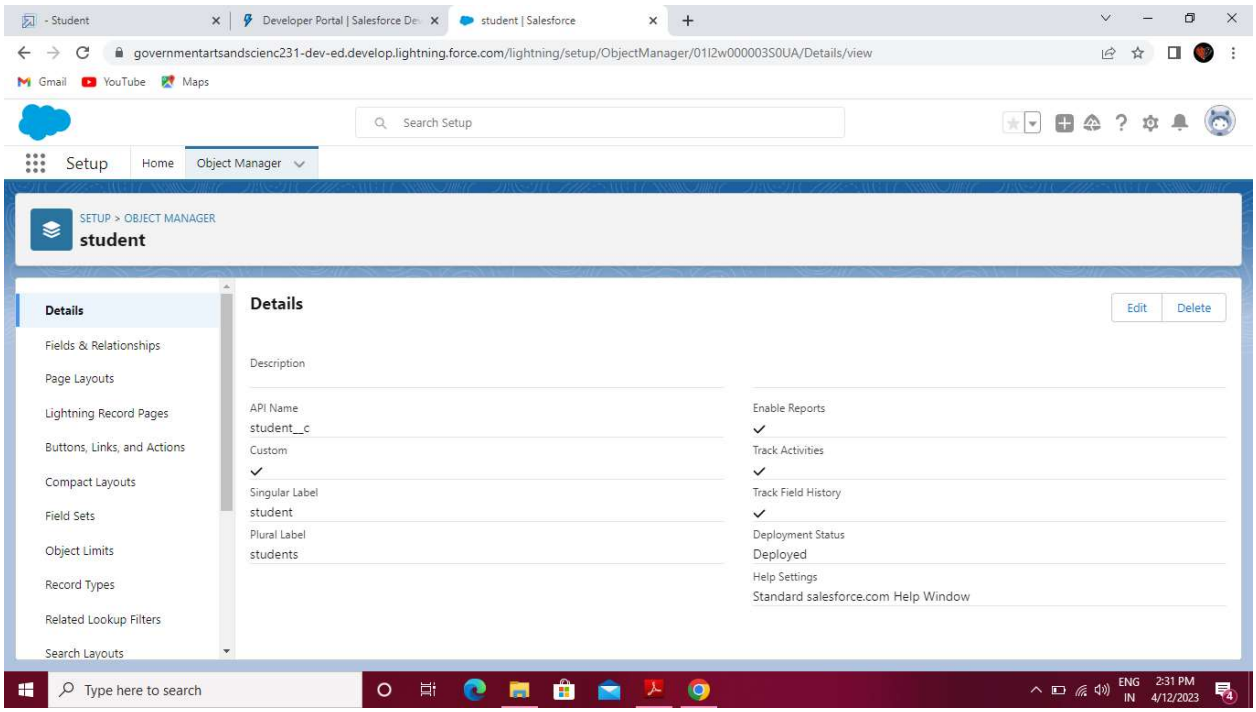
Activity:

Create the School Management app

- From Setup, enter App Manager in the Quick Find and select App Manager
- Click New Lightning App. Enter School Management as the App Name, then click next
- Under App Options, leave the default selections and click Next.
- 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.

Note:

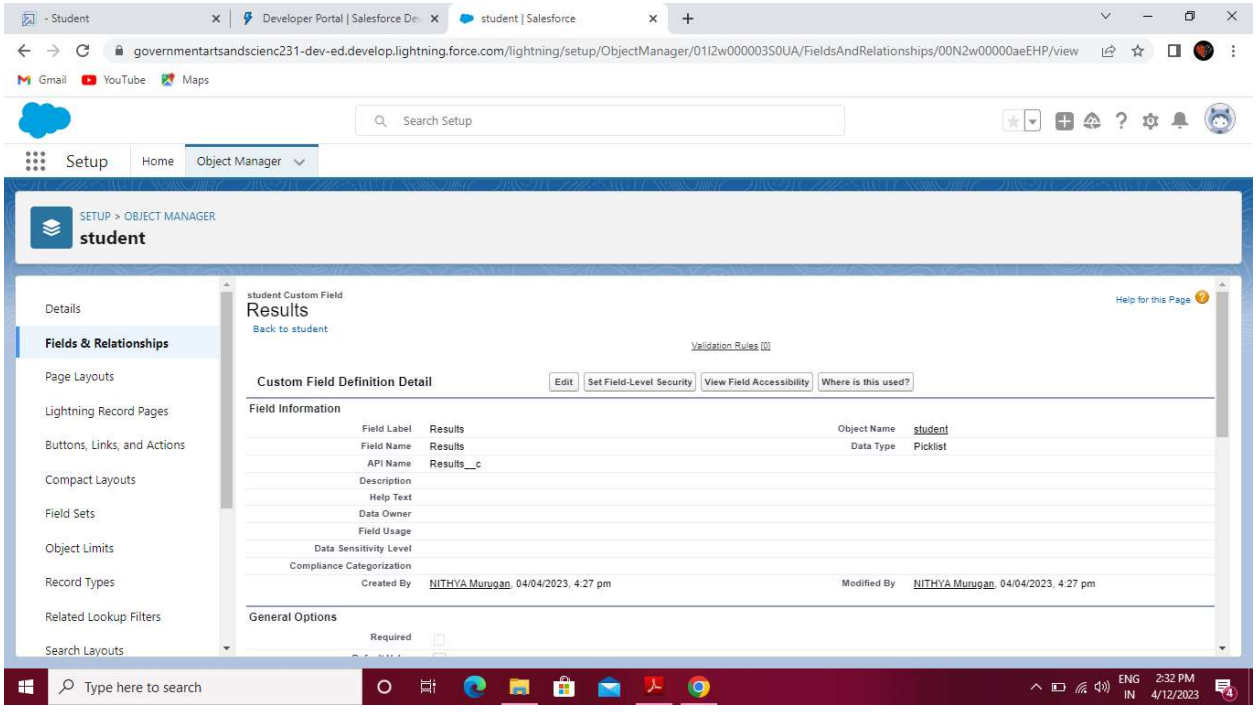
1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

Milestone -4: Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1: Creation of fields for the School objects:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home



3. Select School.
4. Select Fields & Relationships from the left navigation, and click New

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

1. Select the Text Area as the Data Type, then click next.
2. For Field Label, enter Address.
3. 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 labels

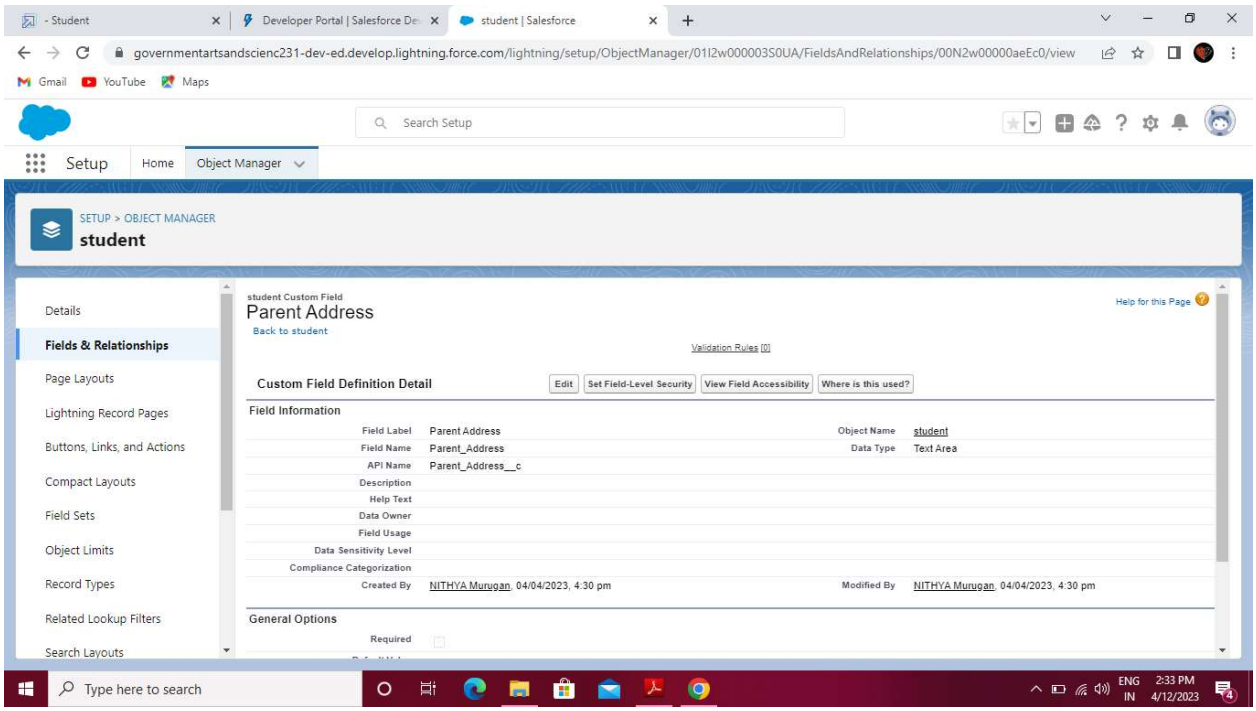
Now let's create the other fields and we must choose the data types of the fields carefully .Let's have a look at it.

For example, a phone number is a number field.

For that we need to select the phone as data type.
Let’s see this
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 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



Activity-2: 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

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

2. For Related to, enter School.

3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.

Let’s create a Pick-List field:

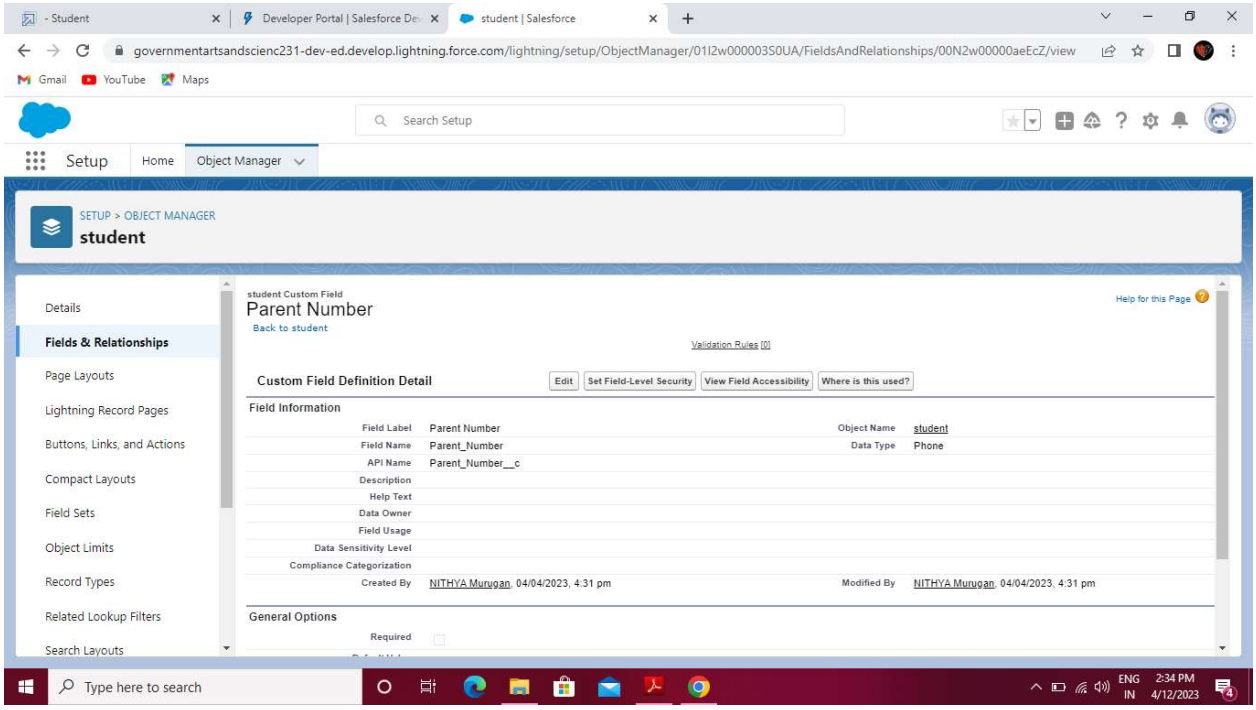
1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Pick list as the Data Type and click next.

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

Activity-3: 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

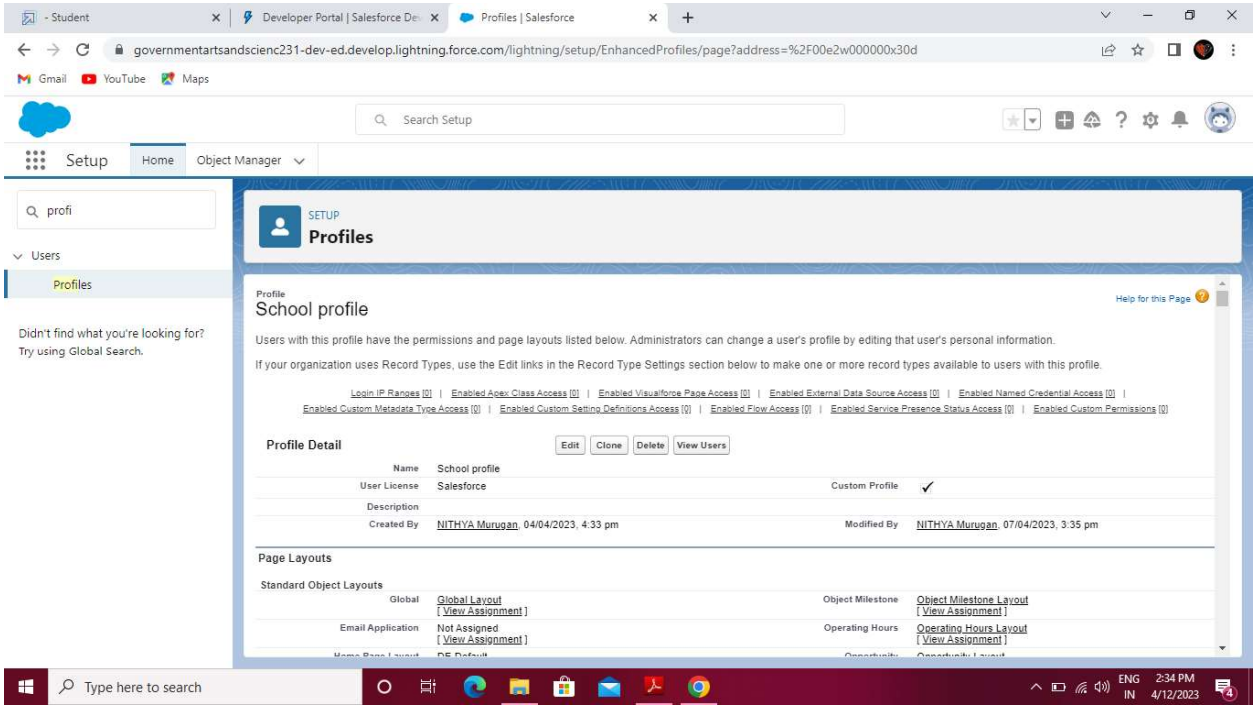


Milestone-5: Profile

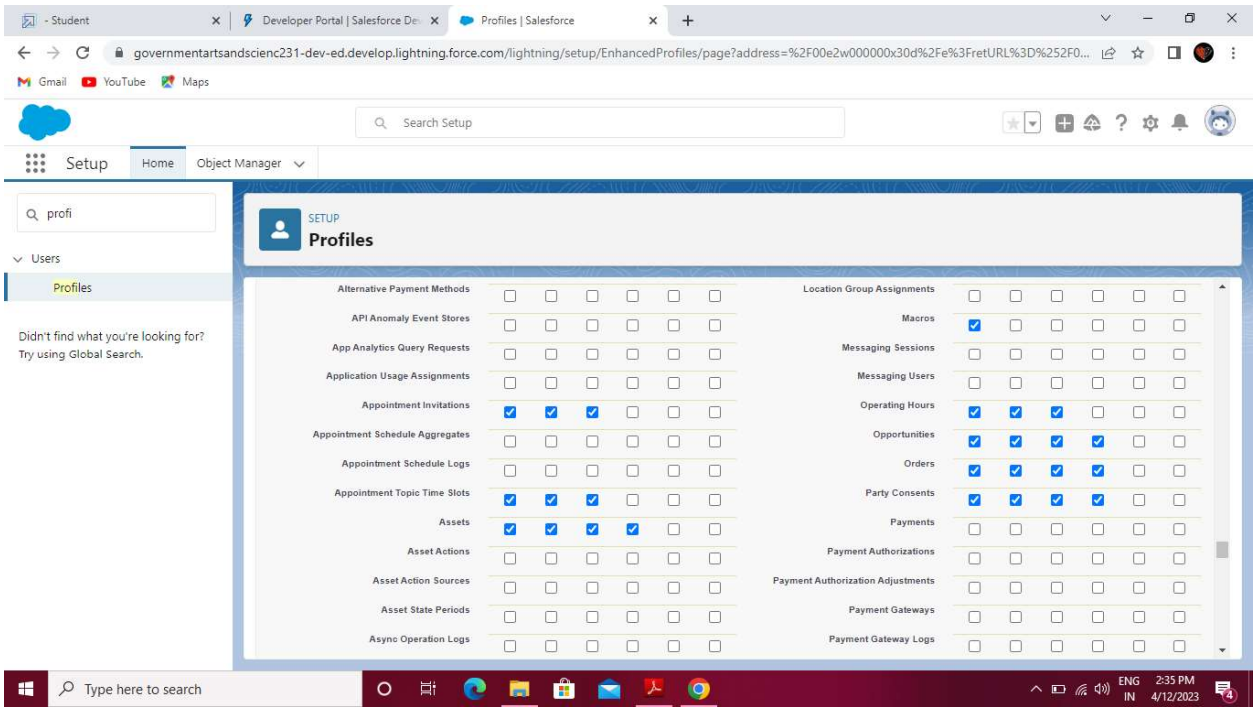
A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges

Activity:

Creation on profile: From Setup enter Profiles in the Quick Find box, and select Profiles.
1. From the list of profiles, find Standard User.
2. Click Clone.
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



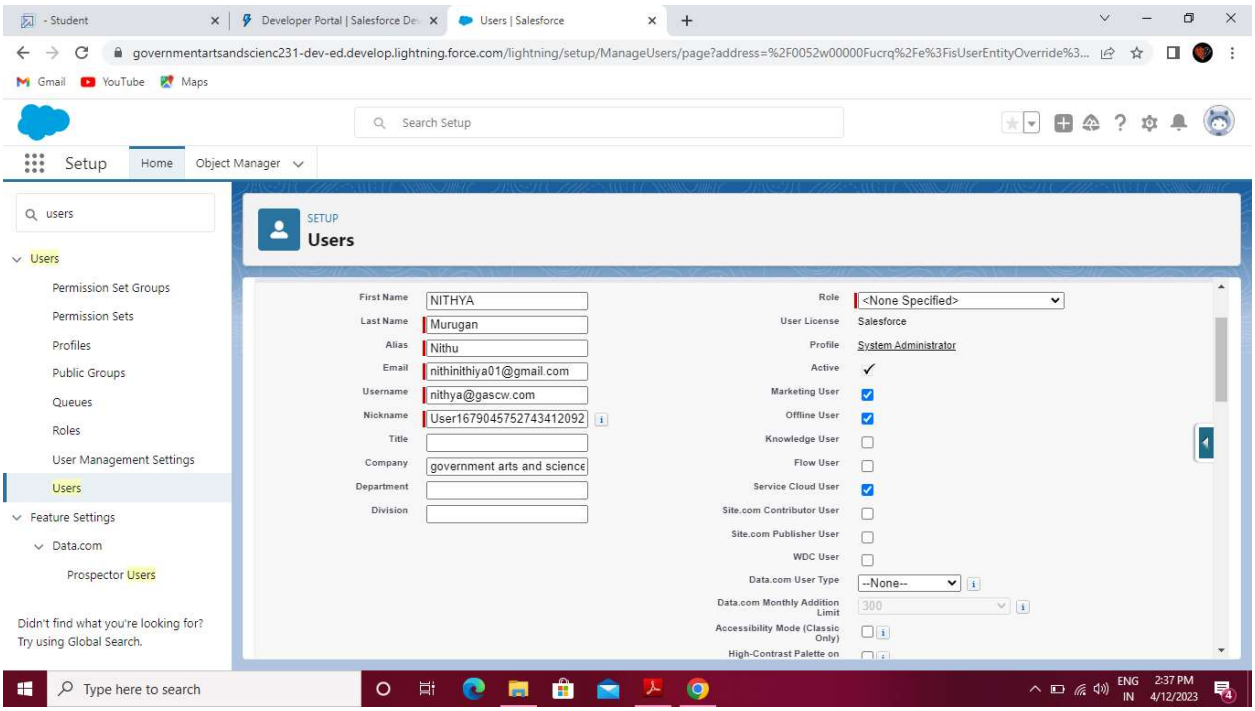
Milestone-6: Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity:

Creating a User's:

1. From Setup, in the Quick Find box, enter Users, and then select Users
2. 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

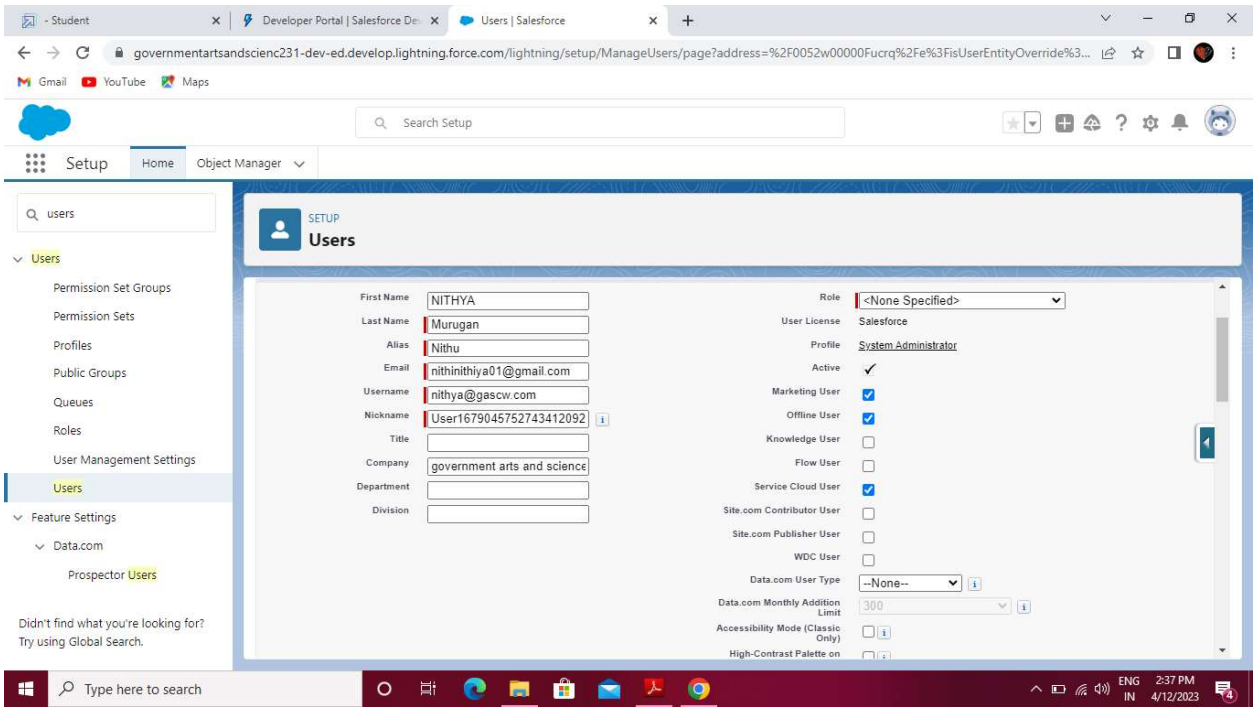
Milestone-7:Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Activity-1:

Permission sets 1:

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



2. 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

Activity-2:

Permission sets 2:

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

Milestone-8: Reports

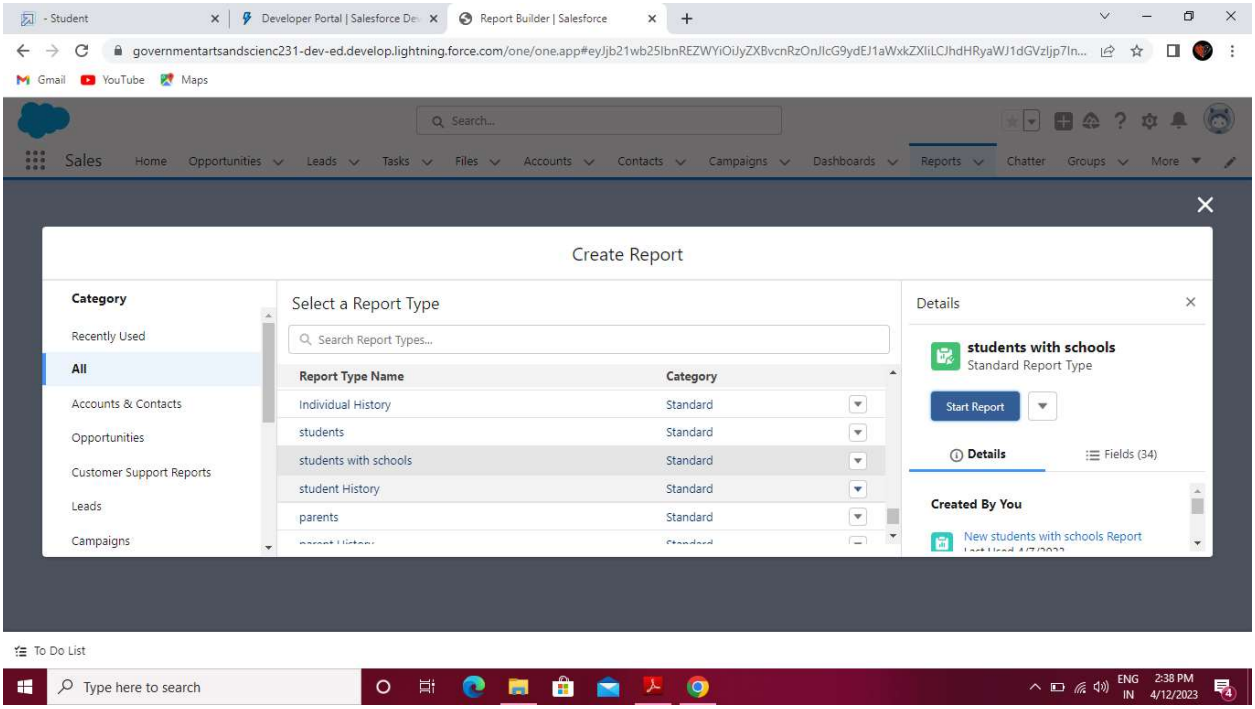
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a

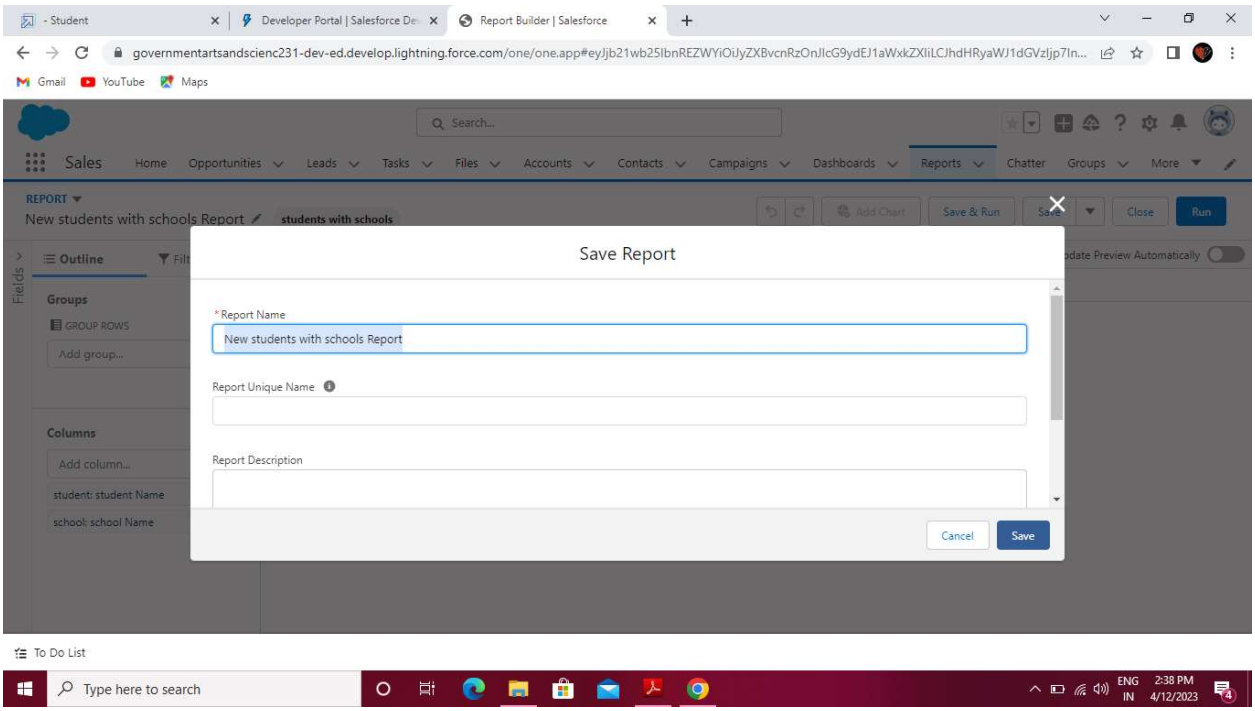
graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

Reports:

1. From the Reports tab, click New Report.




Save Report
*Report Name
New students with schools Report
Report Unique Name
Report Description
Cancel
Save

Advantages & Disadvantage:

Advantages:

It allows for more effective sales and marketing.
It can speed up the sales conversion process.
It increases staff productivity, lowers time costs and boosts morale.
It enables widely dispersed teams to work closely.
Can improve customer loyalty through exceptional experience.

Disadvantages:

Staff over-reliance on CRM may diminish customer loyalty through a bad experience.
It may not suit every business.
Security concerns associated with centralised data.
The excess initial time and productivity cost of implementation
It requires a process-driven sales organisation.

APPLICATIONS:

Using CRM in education industry provides organizations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.

CONCLUSION

From the discussion, you can realize, CRM in the automotive industry is strategically used a model mechanism for brand promotion and

customer attraction. The technology comes with imperative customer analysis measures using technological systems for business organization, automation, and synchronization of the business sales, customer services, marketing, and technical support. CRM has been used to promote local and internal customer interaction elevating the marketing initiative.