

1 INTRODUCTION

1.1 Overview

A CRM (Customer Relationship Management) application for schools or colleges is a software tool designed to help educational institutions manage and maintain their interactions with students, parents, alumni, and other stakeholders. The application serves as a centralized database for all information related to each stakeholder, including their contact information, academic history, financial records, and any relevant notes or communications.

With a CRM application, schools and colleges can streamline their communication with stakeholders, automate administrative tasks, and enhance their overall customer service. For instance, the application can automate email and SMS notifications for important dates, such as admissions deadlines or exam schedules. It can also generate reports on student performance or alumni engagement, enabling institutions to make data-driven decisions.

Overall, a CRM application can help schools and colleges improve their operational efficiency, enhance stakeholder engagement, and ultimately achieve their educational goals.

1.2 Purpose

The use of a CRM application for schools or colleges can provide numerous benefits and can help achieve the following:

Improved Stakeholder Communication: A CRM application allows for centralized communication, which helps schools and colleges send targeted messages to specific stakeholders such as students, parents, alumni, and faculty. This can improve engagement, increase transparency, and keep stakeholders informed about relevant activities and updates.

Enhanced Administrative Efficiency: A CRM application streamlines administrative tasks by automating processes such as scheduling, admissions, fee collection, and records management. This reduces administrative workload, minimizes errors, and increases accuracy.

Better Data Management: The application allows for centralized data storage, which ensures that data is accurate, up-to-date, and easily accessible. This can help institutions make data-driven decisions and gain insights into student performance, alumni engagement, and other important metrics.

Improved Student Experience: By leveraging the data stored in the CRM application, schools and colleges can personalize the learning experience for

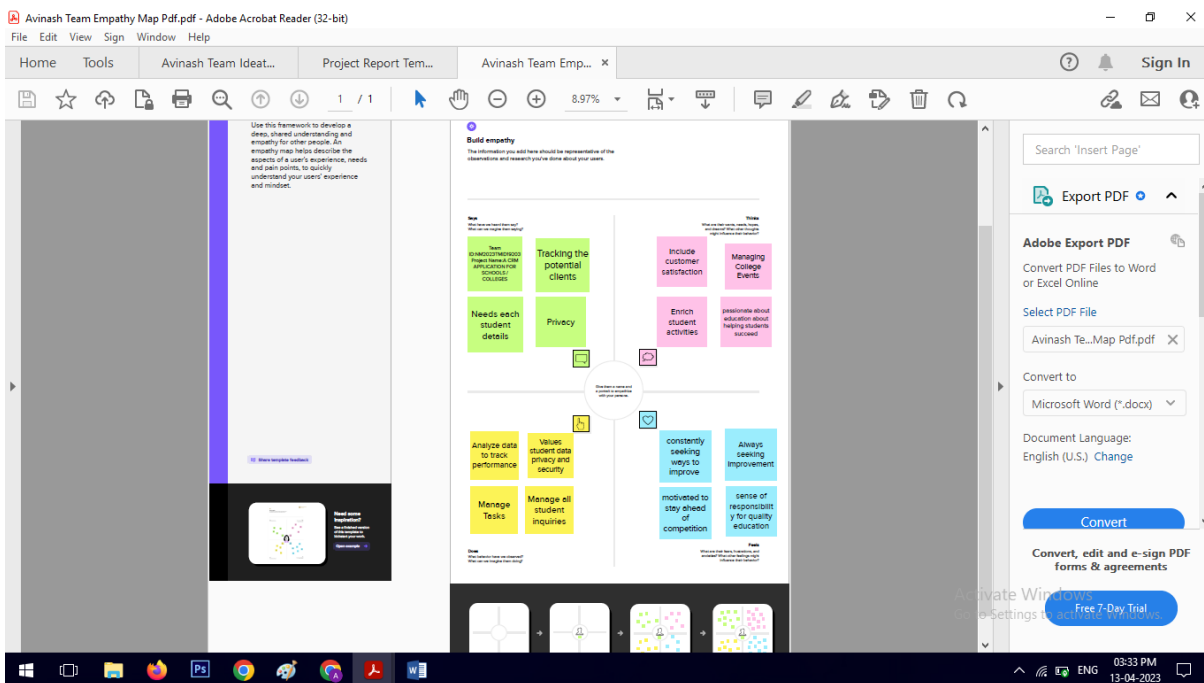
individual students. This can help improve academic performance, boost student satisfaction, and increase retention rates.

Increased Alumni Engagement: The CRM application allows schools and colleges to maintain a relationship with their alumni, which can increase engagement, strengthen alumni networks, and help institutions identify opportunities for fundraising and networking.

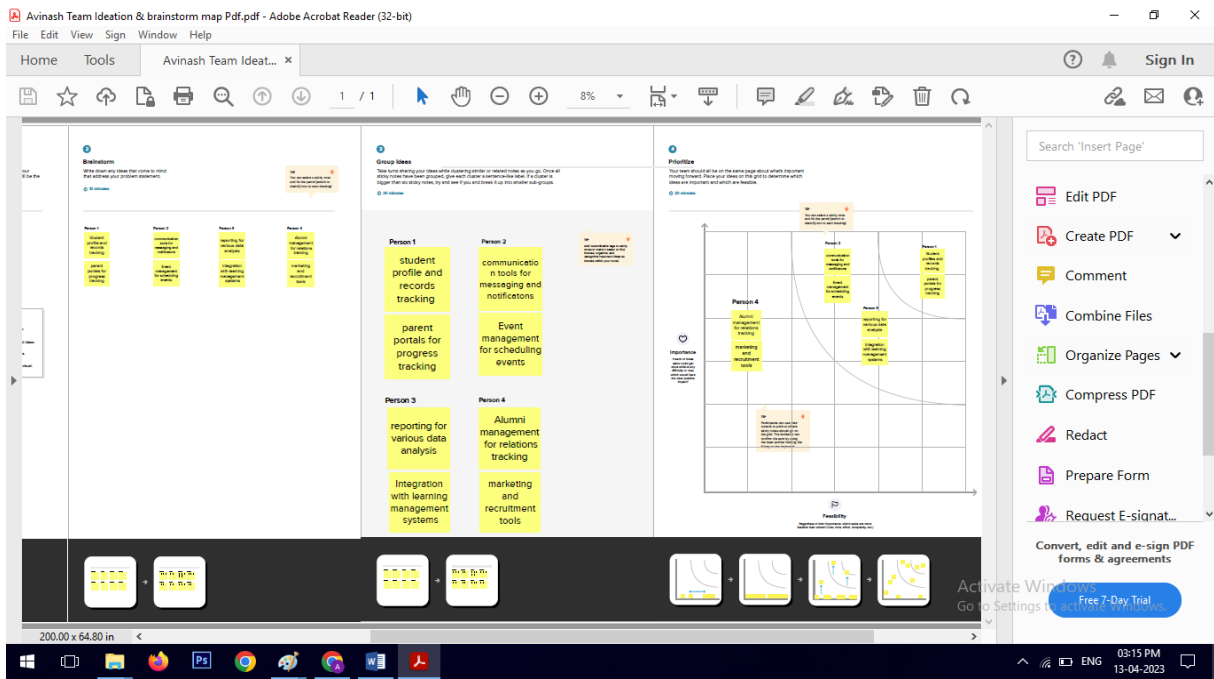
Overall, the use of a CRM application for schools and colleges can help institutions improve stakeholder engagement, increase operational efficiency, and achieve their educational goals.

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 Objects	
School	Field label	Data type
	Address	Text area
	Phone number	Phone
Student	Field label	Data type
	Phone number	Phone
	School	Master-detail relationship
	Results	Picklist
	Class	Number
Parents	Field label	Data type
	Parent address	Text area
	Parent number	Phone

3.2 Activity & Screenshot

Activity 1 :Creating Developer Account

Creating Developer Account

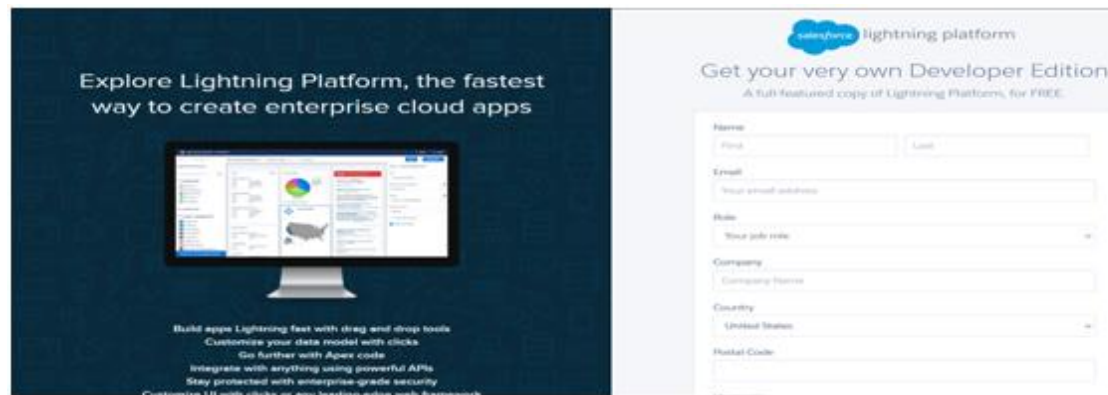
Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer
 - c. Company : College Name
 - d. County : India
 - e. Postal Code : pin code
 - f. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

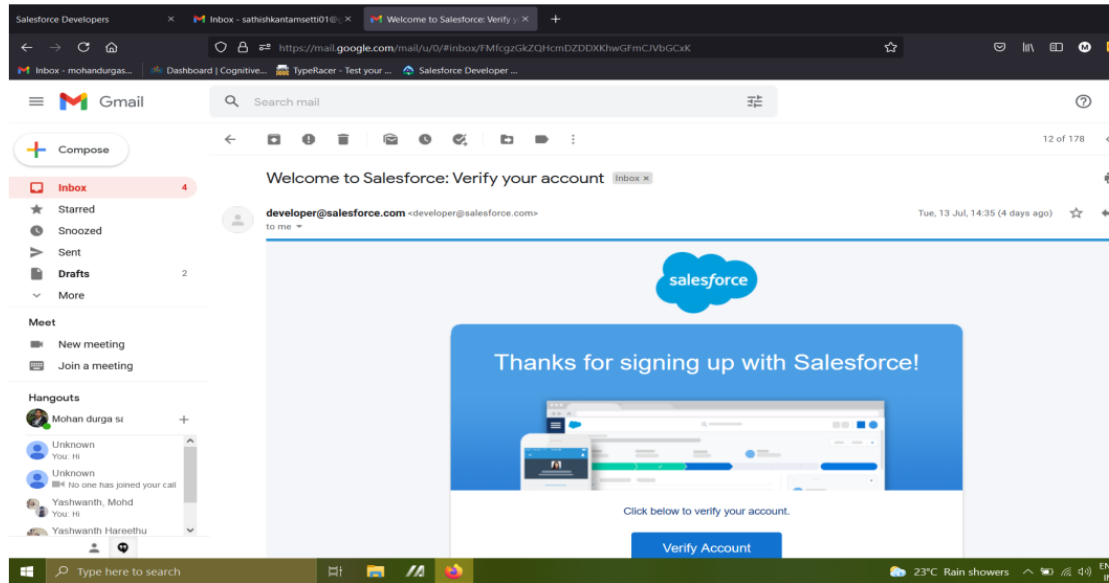
username@organization.com

Click on sign up after filling these.



Account Activation

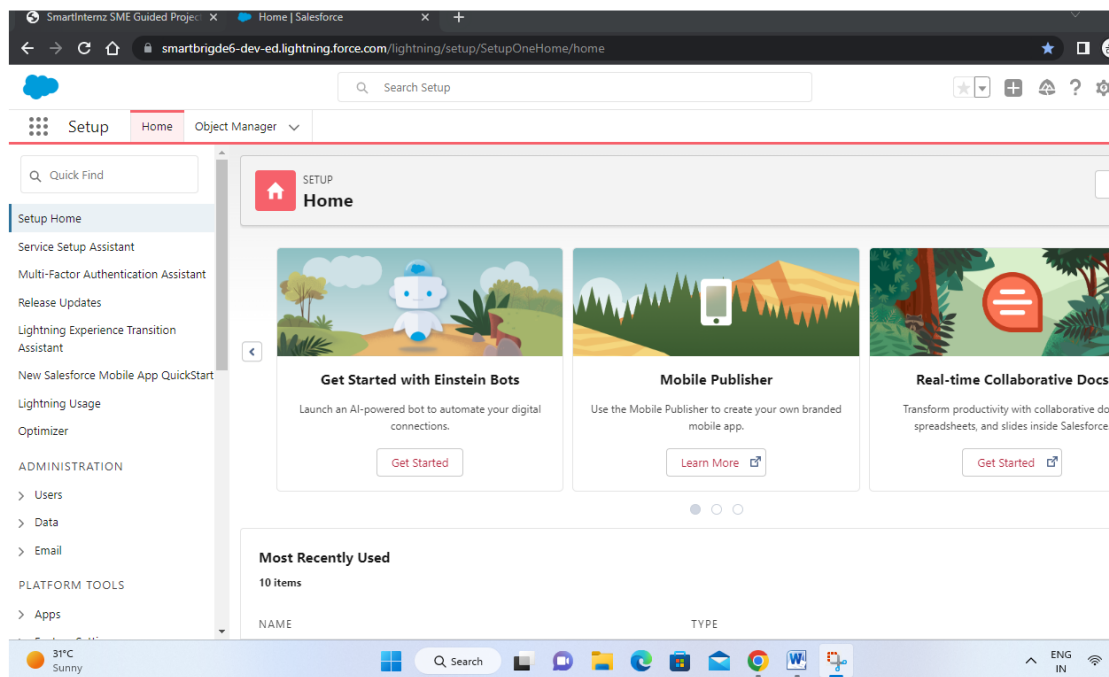
Go to the inbox of the email that you used while signing up.
Click on the verify account to activate your



account. The email may take 5-10mins, as

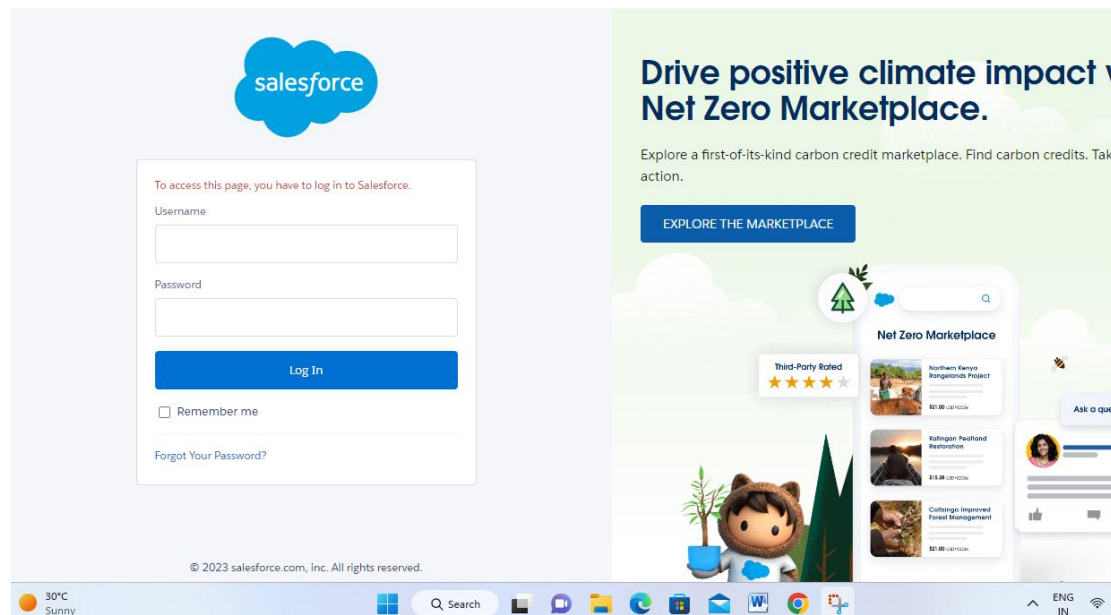
Login To Your Salesforce Account

- 1.Go to salesforce.com and click on login.
- 2.Enter the username and password that you just created.
- 3.After login this is the home page which you will see.



Salesforce Login

<https://login.salesforce.com>



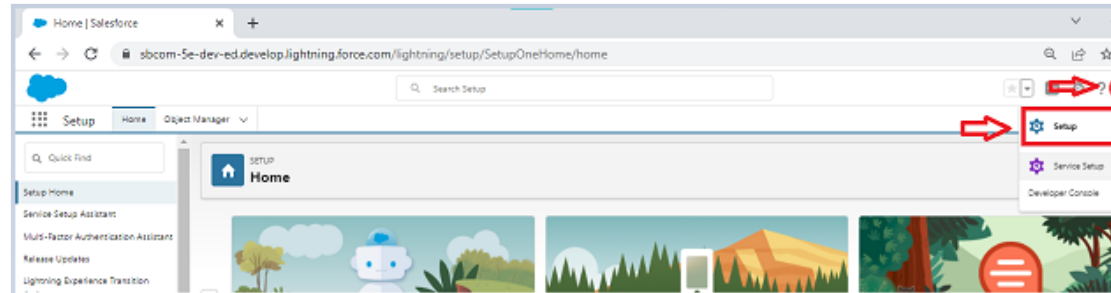
Milestone-2:Object

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.



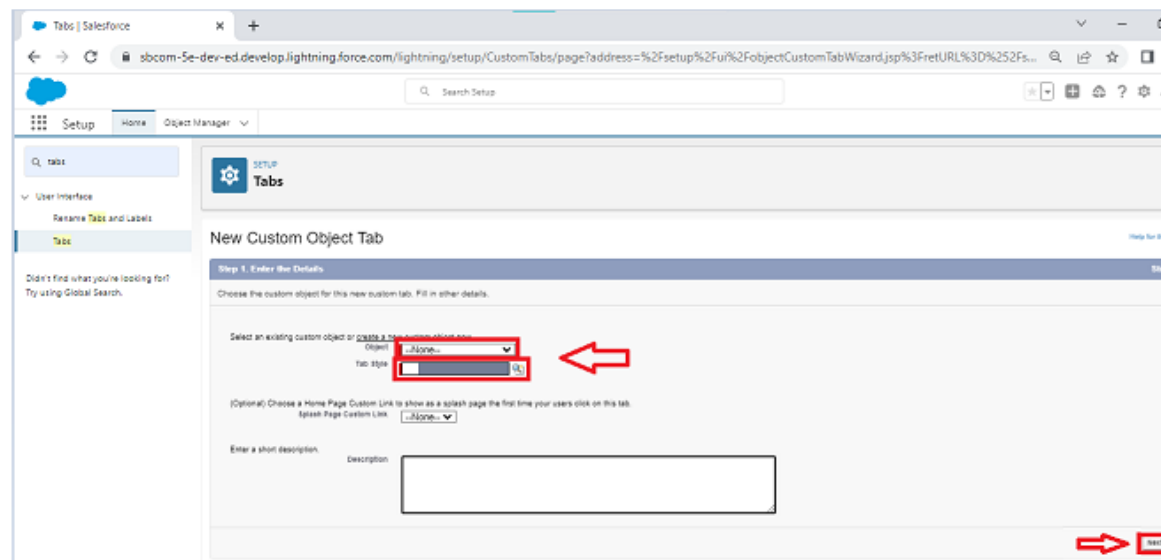
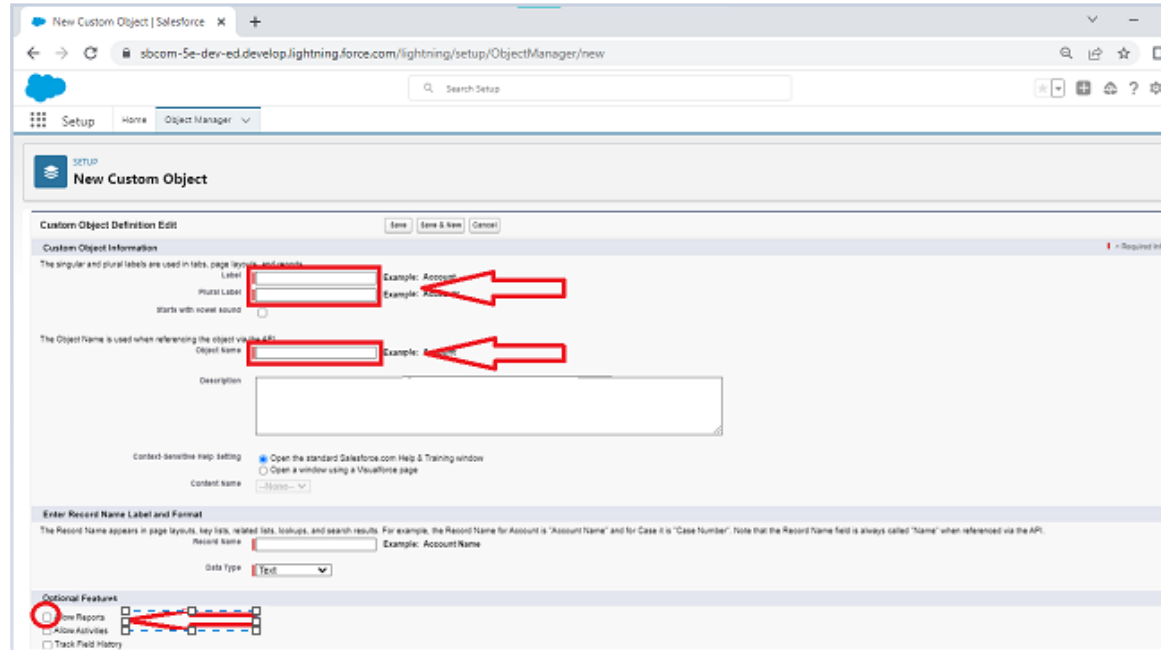
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown

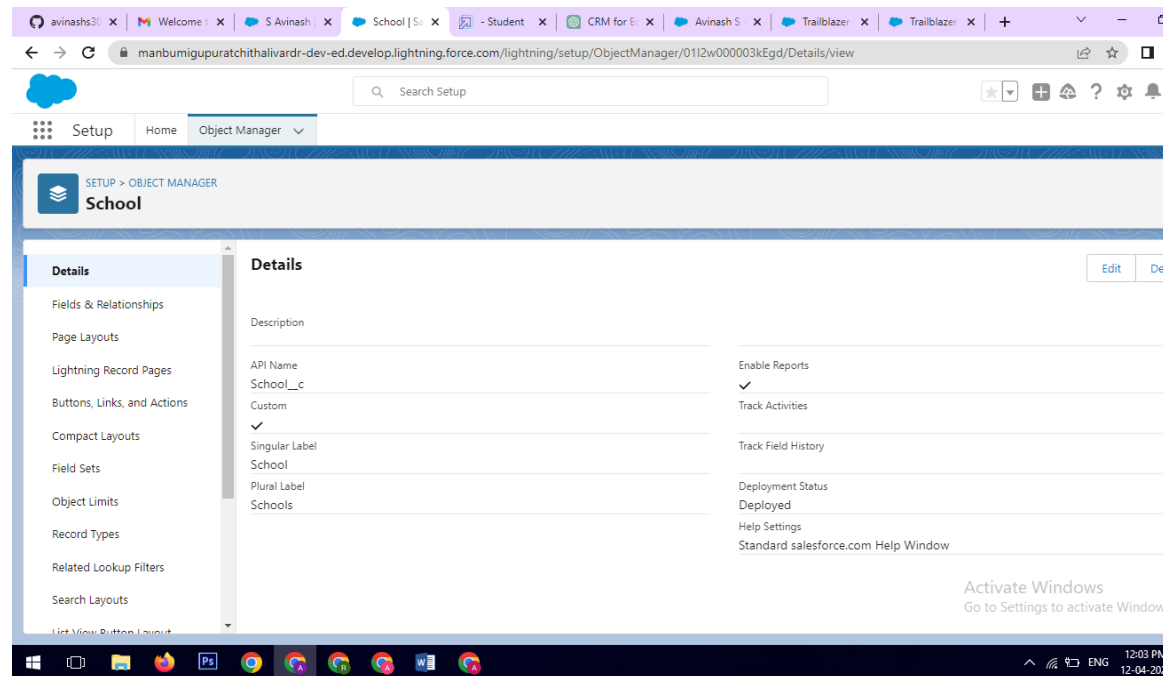
click on that and select Custom Object.

● 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.



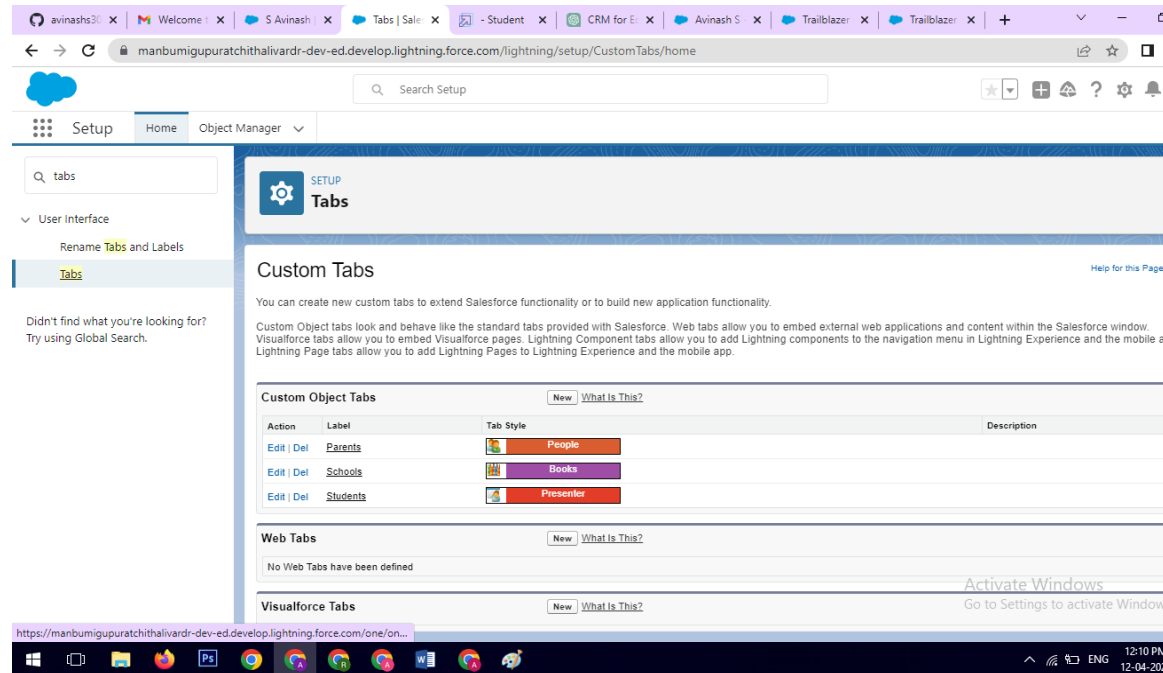


Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

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.

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.

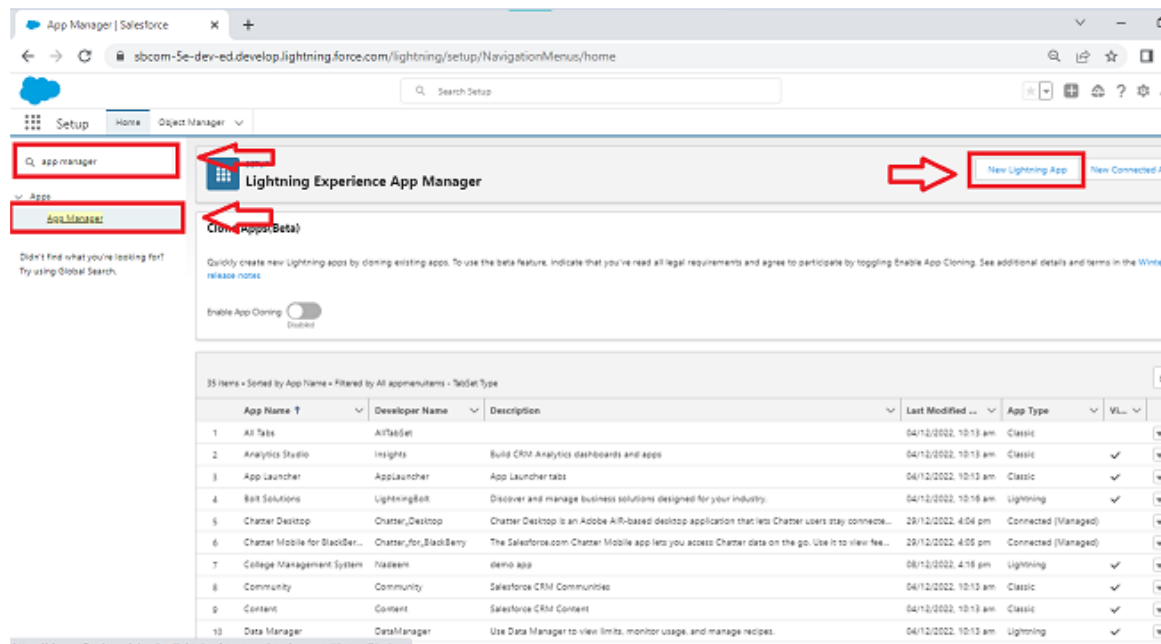
Milestone-3:Lightning App

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

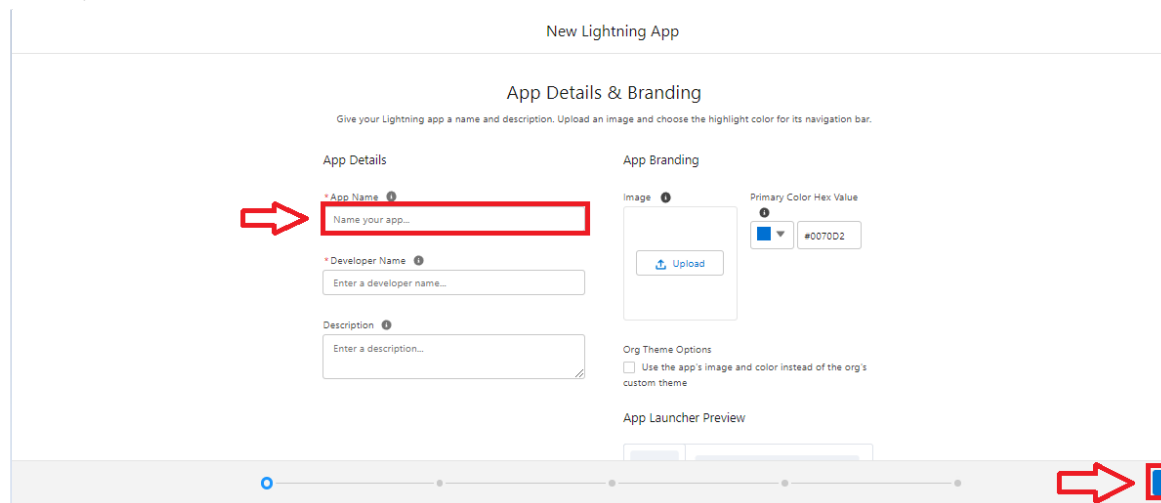
Activity:

Create the School Management app

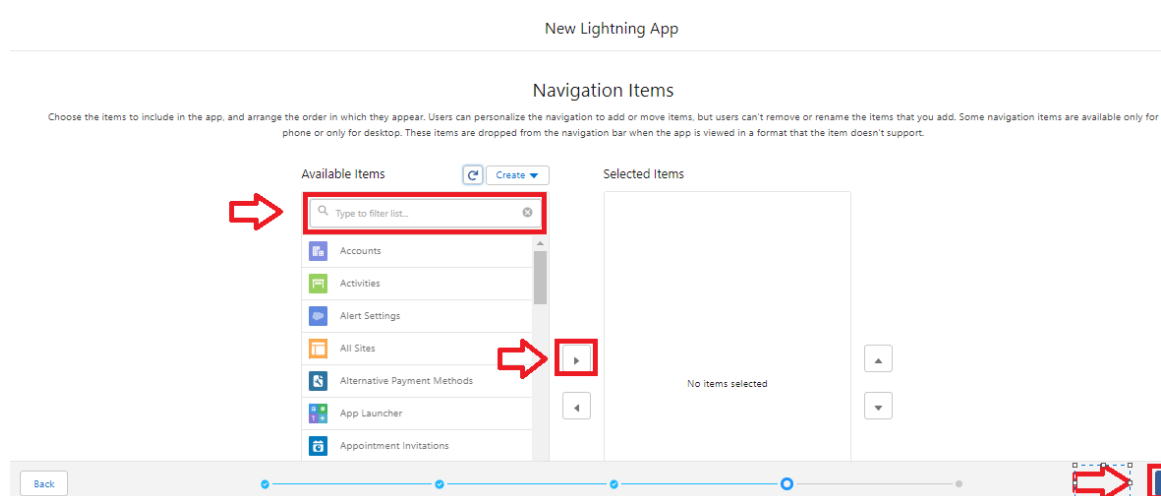
- From Setup, enter App Manager in the Quick Find and select App Manager.



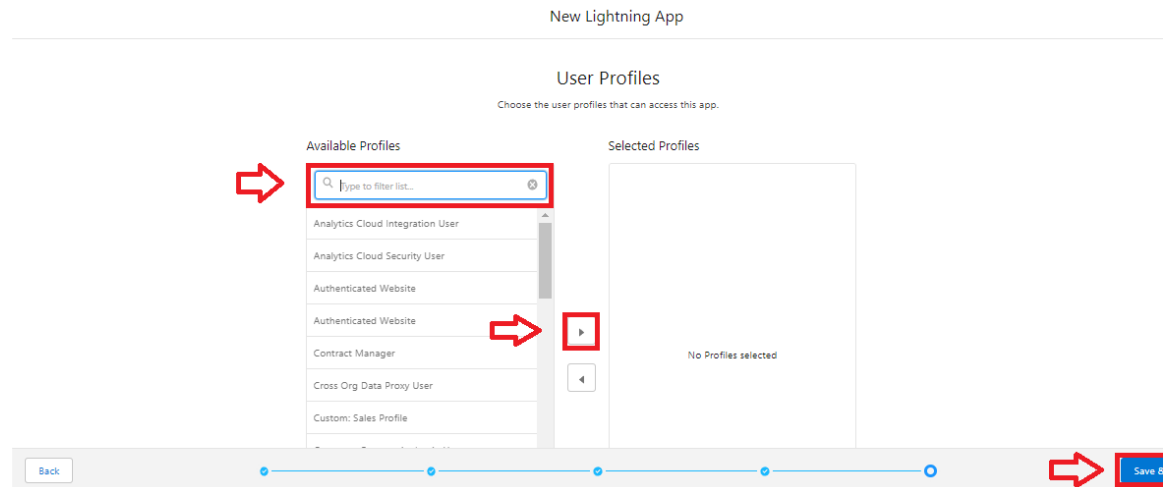
- Click New Lightning App. Enter School Management as the App Name, then click Next



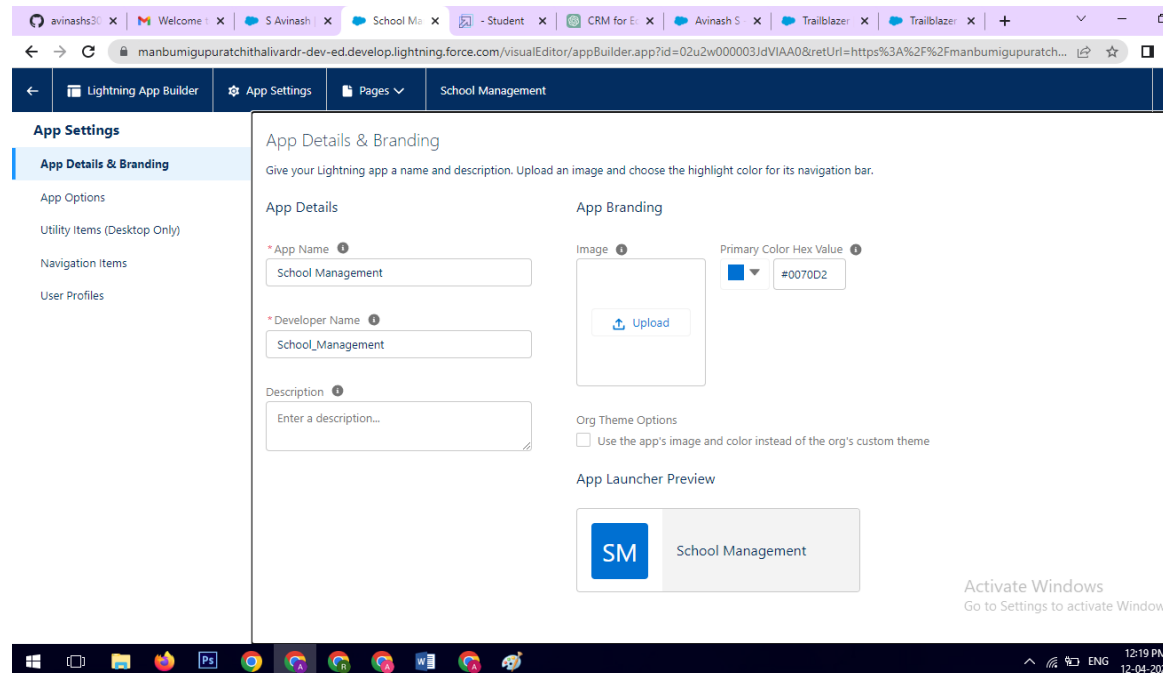
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.



- 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**.

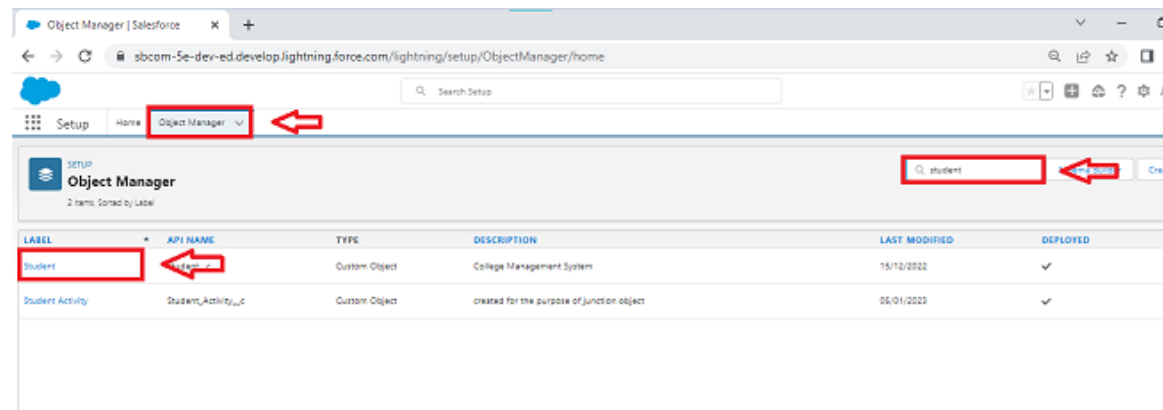
Relationships are created by creating custom relationship fields on an object. This is done so that

when users view records, they can also see and access related data.

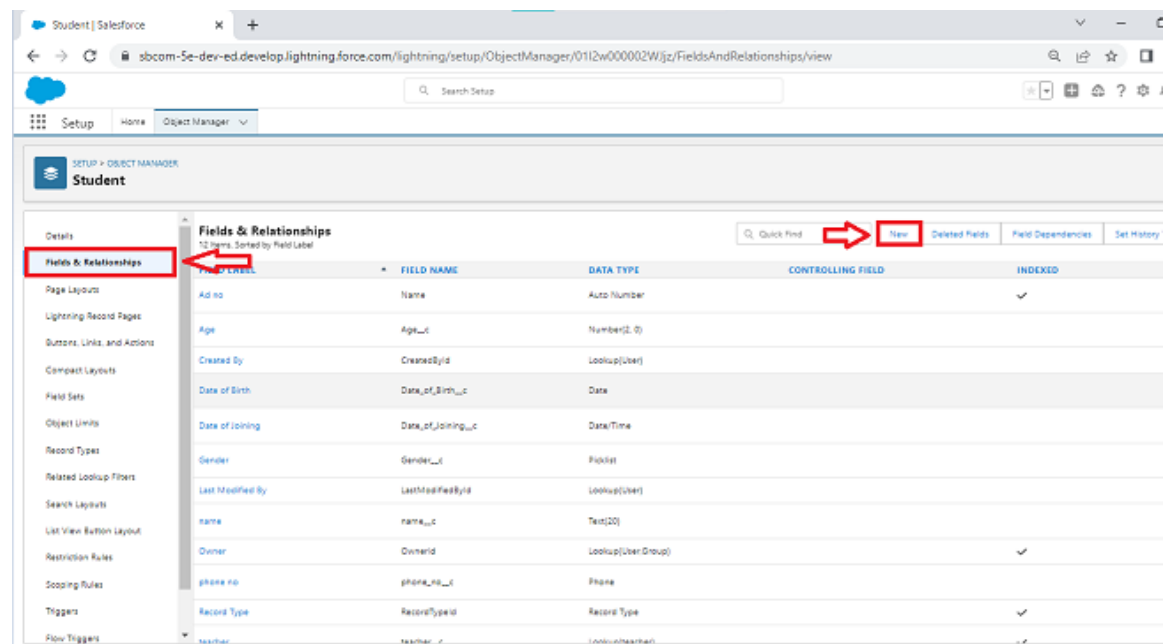
Activity-1:

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.

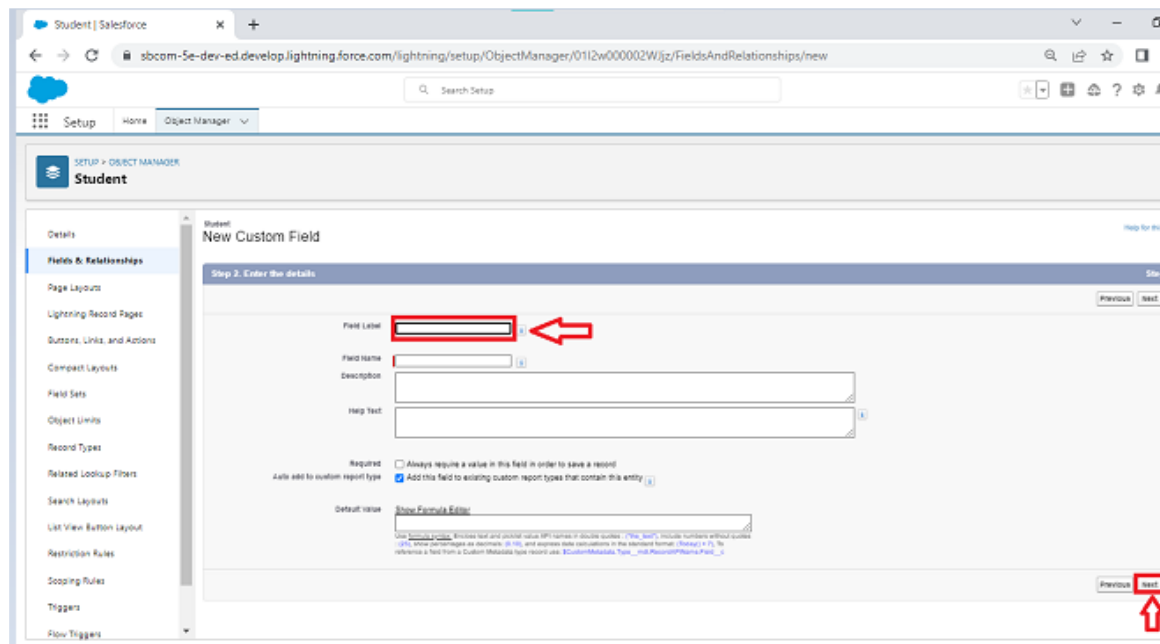


3. Select School.
4. Select Fields & Relationships from the left navigation, and click New



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

Lets 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.

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
4. Enter the field label as Highest Marks
5. 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.

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.

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.

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, Visualforce page access, Page layouts, Record Types,

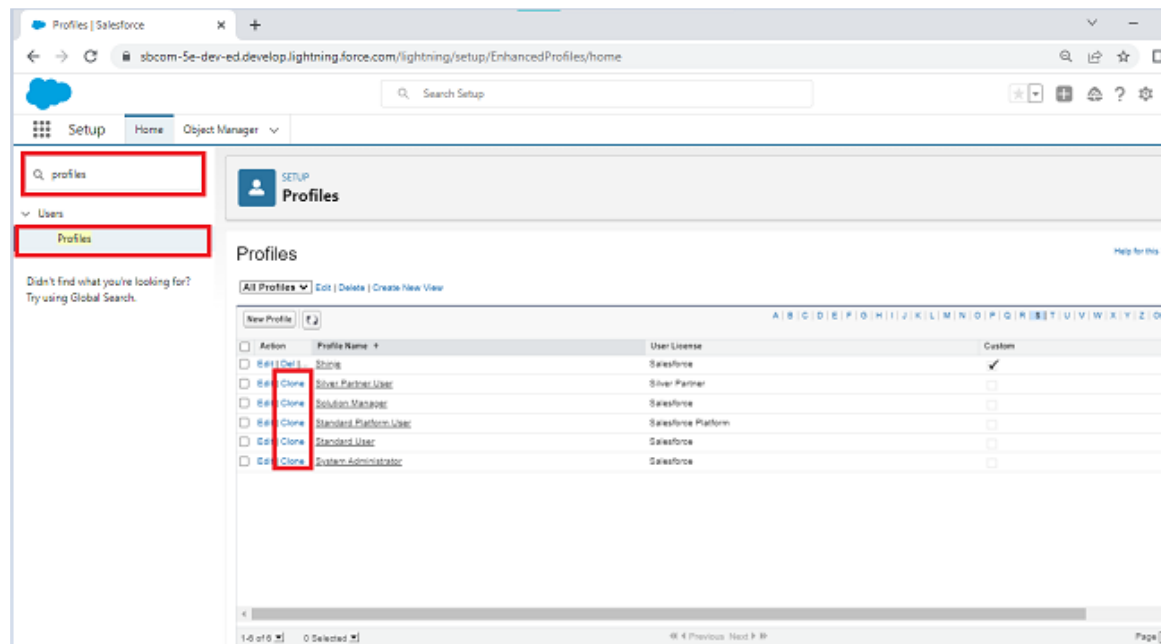
Login hours & Login IP ranges

Activity:

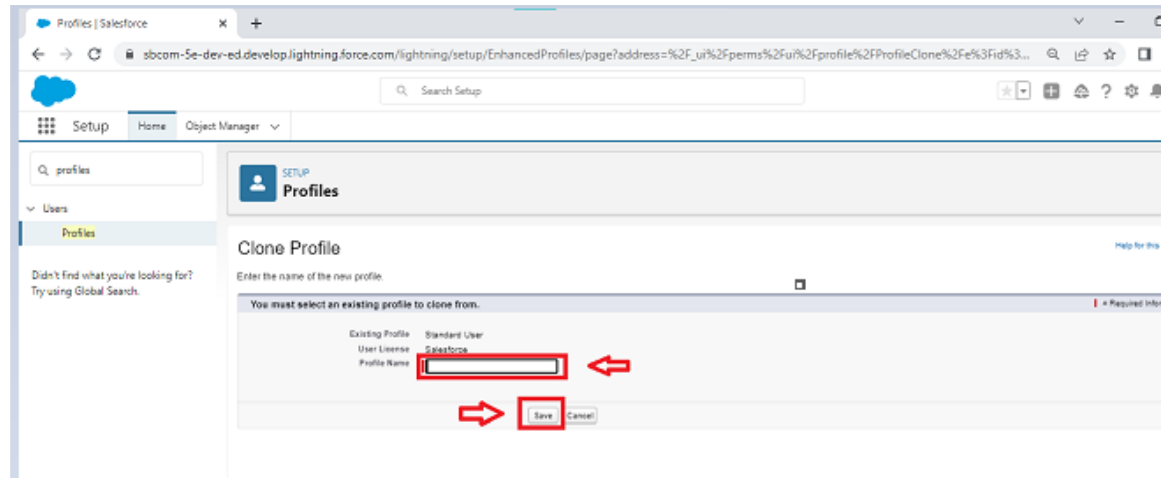
Creation on profile:

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

1. From the list of profiles, find Standard User.
2. Click Clone.



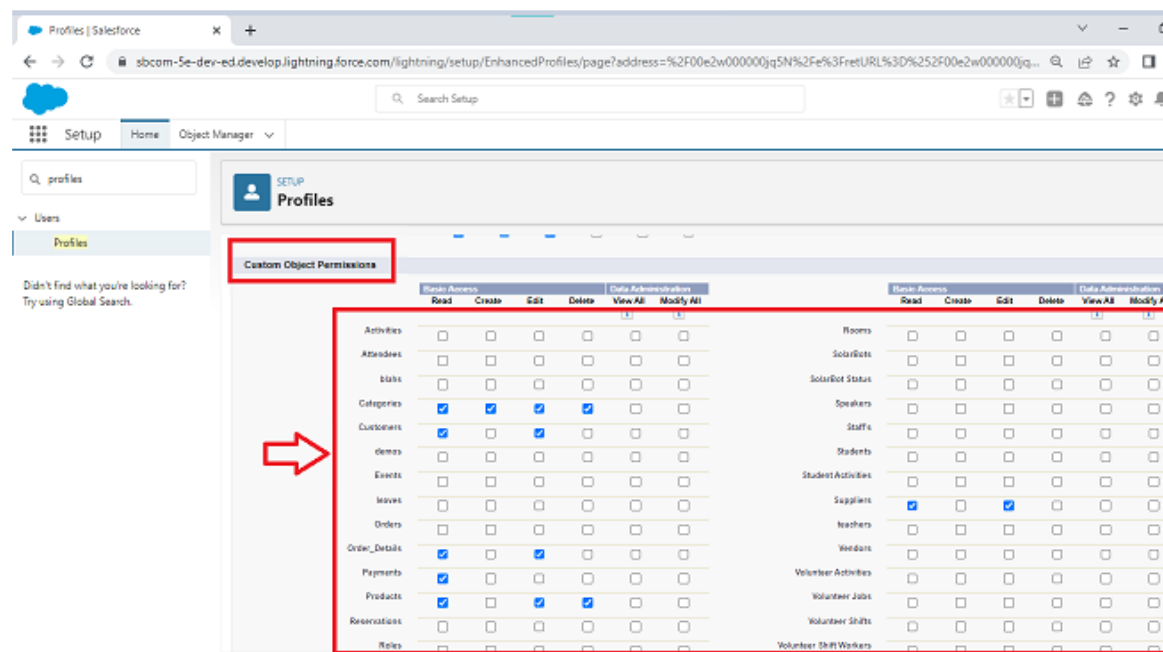
3. For Profile Name, enter School profile.



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



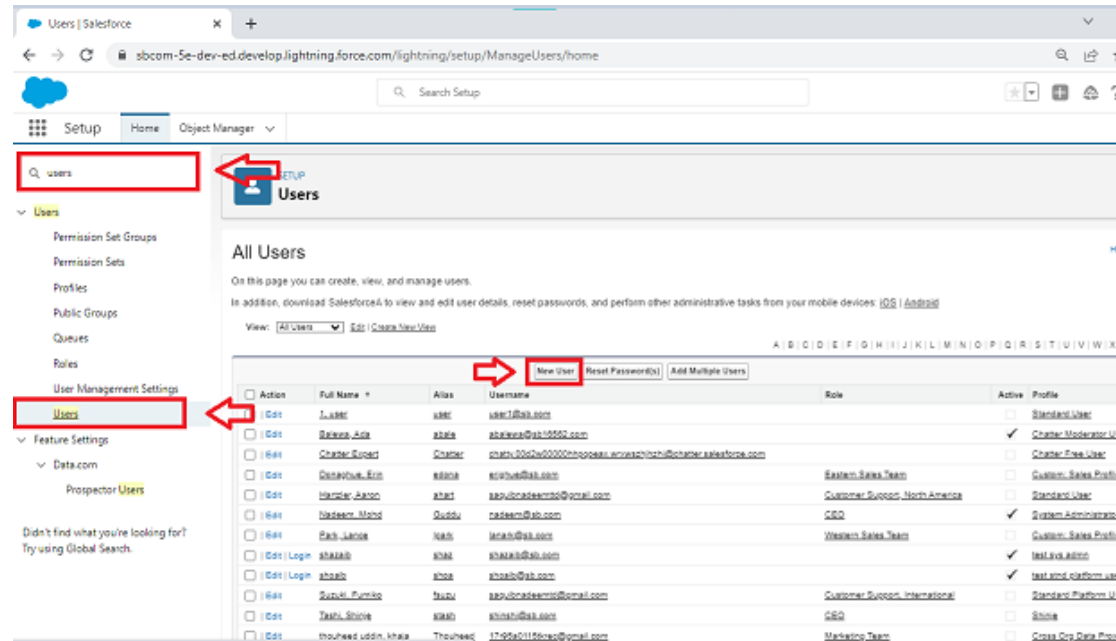
Milestone-6: Users

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 Users:

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.

The screenshot shows the 'New User' page in Salesforce Setup. The 'General Information' section has several input fields for user details. A red box highlights the 'First Name' field. Another red box highlights the 'Role' dropdown menu, which is currently set to 'XOrg Proxy User'. A red arrow points to the 'Save' button at the top of the form.

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.

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The left sidebar has a search bar with 'permission sets' entered. Below it, the 'Permission Sets' link is highlighted. In the main content area, the 'New' button is highlighted with a red arrow. Below the 'New' button, there is a table of existing permission sets.

Action	Permission Set Label	Description	License
Del Clone	Biloual.Pild		
Clone	Basic	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a ...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
Del Clone	Customer Profile Manager		Salesforce
Clone	Facility Manager	Lets users create, read, edit, and delete locations, subscriptions, que...	Facility Manager
Clone	Field Service Mobile Standard Perm Set	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
Clone	Merchandise User	Allow access to commerce merchandising features.	Commerce Merchandise User Permission Set License Seat
Clone	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User

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

Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FNewPermissionSet.apexp

Setup Home Object Manager

permission sets

Users

Permission Sets

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

Permission Sets

Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want the permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Search more here.](#)

License

Save Cancel

Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000006svw7

Setup Home Object Manager

permission sets

Users

Permission Sets

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

Permission Sets

teacher permission

Find Settings Clone Delete Edit Properties **Manage Assignments**

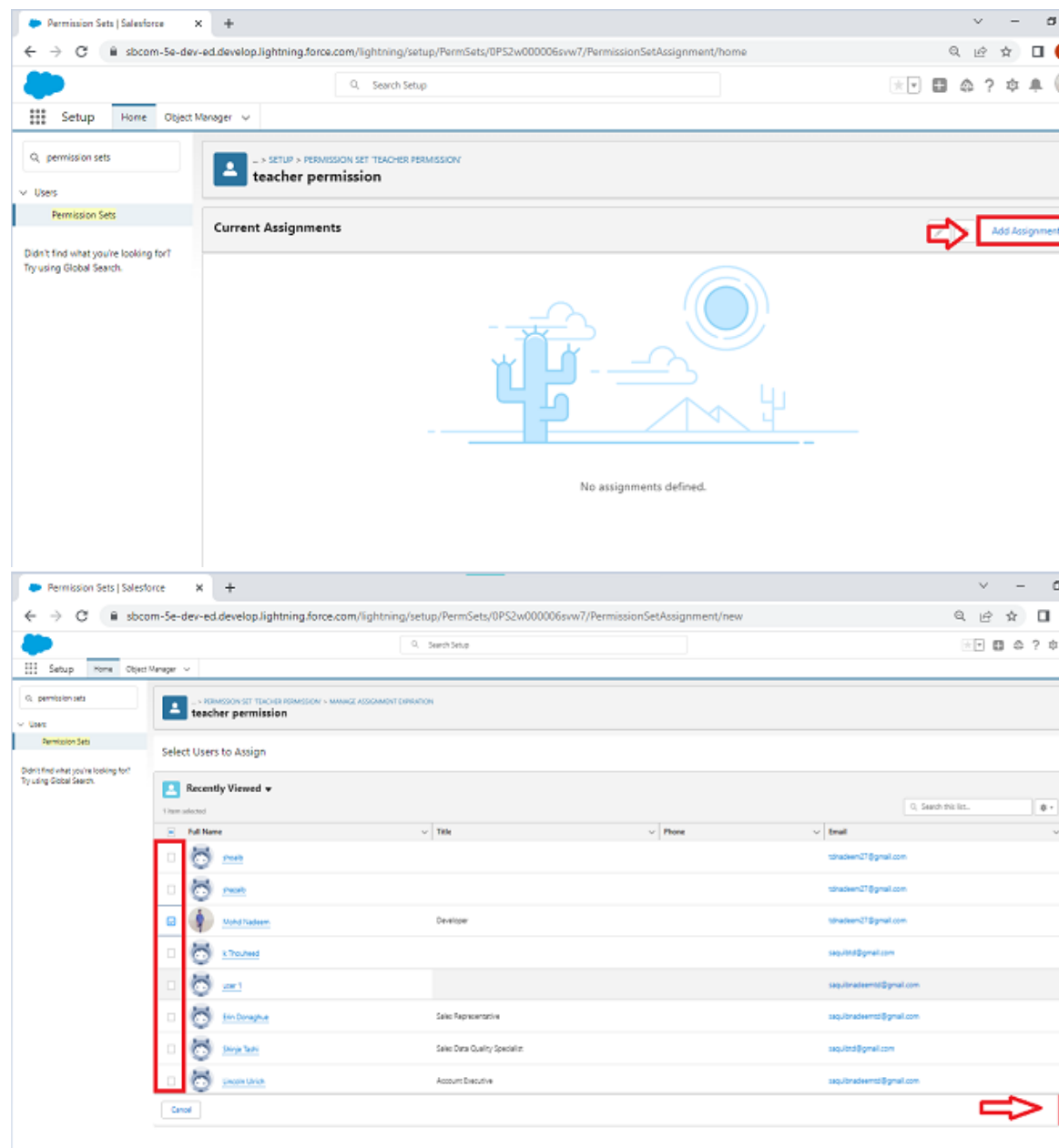
Permission Set Overview

Description	API Name	teacher_permission
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Mahesh Nadarajan
Last Modified By		23/01/2023, 2:28 pm

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu.
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**
Permissions to execute Apex classes.
- Visualforce Page Access**
Permissions to execute Visualforce pages.
- External Data Source Access**

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform. [Learn More](#)



Similarly follow the above steps for the permission set 2.

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

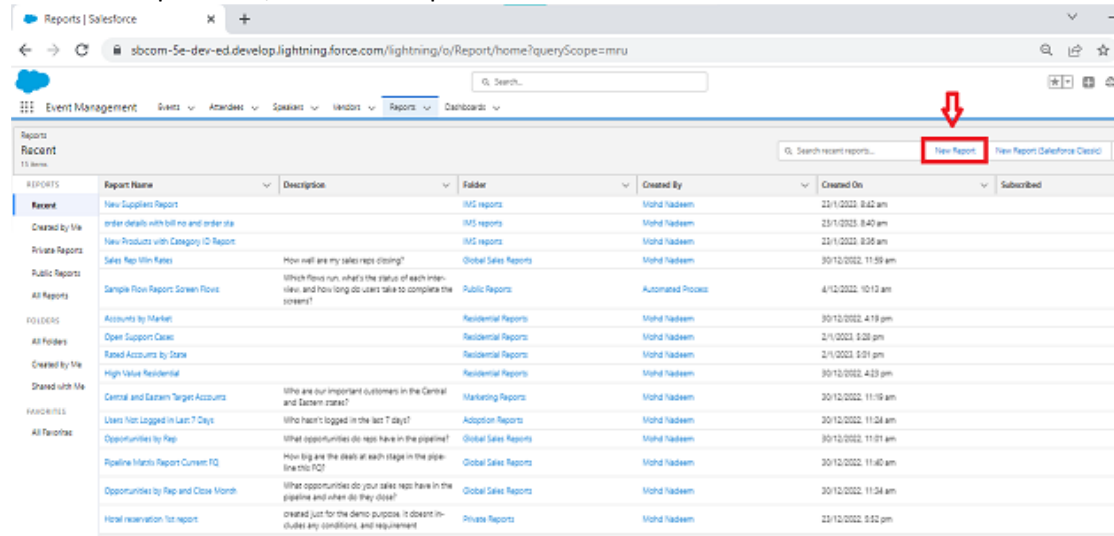
A report is a **list of records that meet the criteria you define**. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or

read/write.

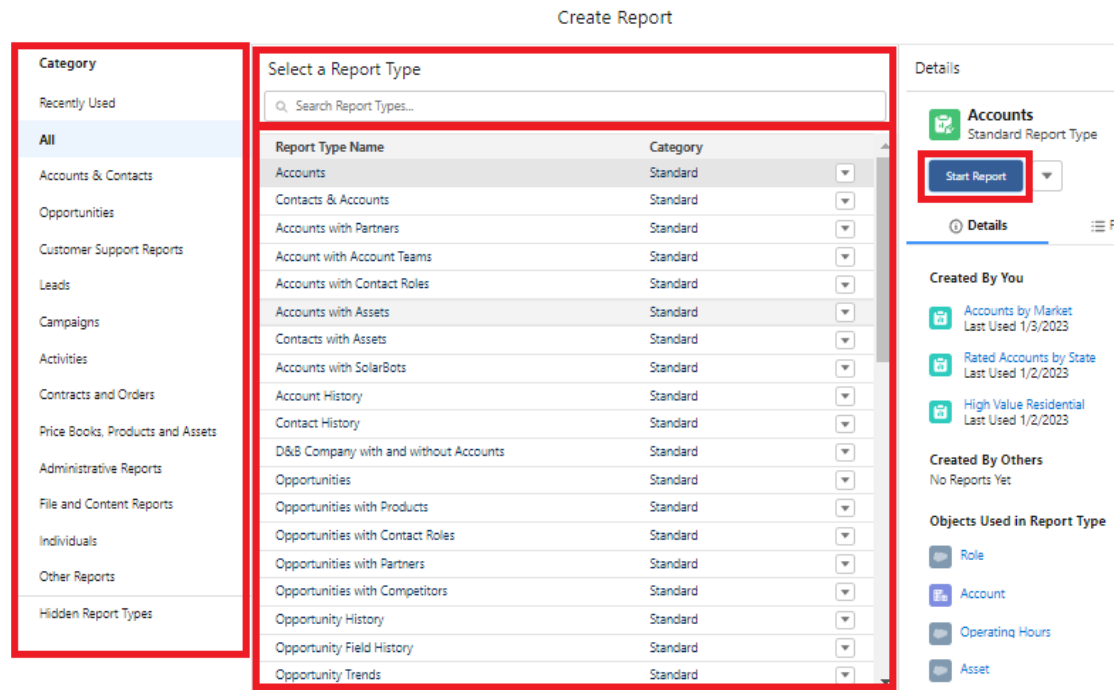
Activity:

Reports :

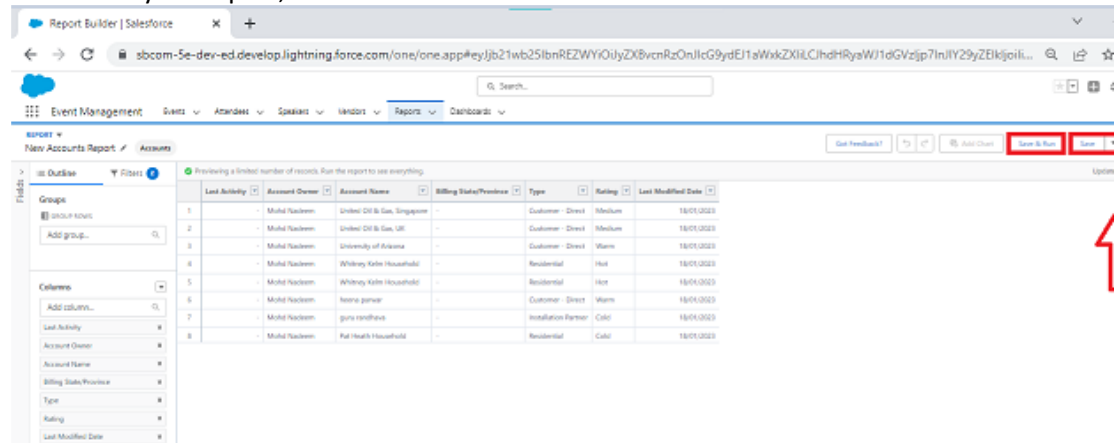
1. From the Reports tab, click New Report.



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



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



Team Lead - <https://trailblazer.me/id/avins19>

Team Member 1 - <https://trailblazer.me/id/magasthiya>

Team Member 2 - <https://trailblazer.me/id/amurugan41>

Team Member 3 – <https://trailblazer.me/id/rragavan7>



Project Report Template

ADVANTAGES & DISADVANTAGE

Advantages of a CRM Application for Schools/Colleges:

1. Enhanced Student Experience: A CRM application provides personalized support to students, improving their overall experience with the institution.
2. Streamlined Administrative Processes: Automation of administrative tasks, such as course scheduling and grade tracking, saves time and reduces the workload of staff.
3. Improved Communication: A centralized database allows for more effective communication with students, alumni, and other stakeholders, resulting in better relationships and increased engagement.
4. Better Data Analysis: Data analytics tools allow for trend analysis, enabling institutions to make data-driven decisions that improve outcomes.
5. Increased Efficiency: The automation of processes reduces manual work, increasing efficiency and accuracy.

Disadvantages of a CRM Application for Schools/Colleges:

1. Cost: Implementing a CRM application requires significant investment in software, hardware, and personnel, which can be a financial burden for some institutions.
2. Complexity: CRM applications can be complex to set up and manage, requiring technical expertise and a significant learning curve for staff.
3. Security Risks: With a centralized database, there are risks of data breaches and security threats. Institutions must take appropriate measures to secure the data.
4. Resistance to Change: Some staff may be resistant to the adoption of new technology, making it difficult to implement and fully realize the benefits of a CRM application.
5. Data Management: Maintaining accurate and up-to-date data is critical for a CRM application to function effectively. Institutions must ensure data quality by implementing appropriate policies and procedures.

Overall, while there are potential disadvantages to implementing a CRM application for schools/colleges, the benefits of improved student experience, streamlined administrative processes, and better data analysis outweigh the drawbacks. Institutions must carefully evaluate their needs and capabilities before deciding whether to invest in a CRM application.

6 APPLICATIONS

A CRM application for schools/colleges can be applied in several areas, including:

1. **Enrollment Management:** A CRM application can streamline the enrollment process, enabling institutions to efficiently manage applications, track leads, and provide personalized support to prospective students.
2. **Student Services:** A CRM application can provide a centralized database for storing and tracking student information, allowing institutions to provide personalized support to students and monitor their progress.
3. **Alumni Management:** A CRM application can help institutions maintain relationships with alumni, enabling them to keep in touch and engage with their former students.
4. **Fundraising:** A CRM application can help institutions manage fundraising efforts by providing tools for donor management, gift tracking, and communication with donors.
5. **Marketing and Communications:** A CRM application can help institutions communicate more effectively with prospective students, alumni, and other stakeholders, providing personalized and targeted communications.
6. **Academic Advising:** A CRM application can provide tools for academic advising, enabling advisors to monitor student progress and provide personalized guidance.
7. **Campus Safety:** A CRM application can help institutions monitor and respond to campus safety incidents by providing real-time alerts and incident tracking.

Overall, a CRM application can be applied in many areas of a school/college's operations, improving efficiency, communication, and the overall student experience.

8 CONCLUSION

In conclusion, a CRM application for schools/colleges can be a valuable tool for improving the overall student experience, streamlining administrative processes, and providing personalized support to students, alumni, and other stakeholders.

The advantages of implementing a CRM application include enhanced communication, streamlined administrative processes, better data analysis, and increased efficiency. However, there are also potential disadvantages, including cost, complexity, security risks, resistance to change, and data management issues.

Despite these potential drawbacks, the benefits of a CRM application outweigh the disadvantages, making it a worthwhile investment for institutions. It can be applied in several areas, including enrollment management, student services, alumni

management, fundraising, marketing and communications, academic advising, and campus safety.

Overall, a CRM application can help schools and colleges to better understand their students' needs and preferences, and to tailor their communications and services accordingly. By using data analytics tools, institutions can also identify trends, anticipate future needs, and make data-driven decisions that improve outcomes.

9 FUTURE SCOPE

There are several potential enhancements that could be made to a CRM application for schools/colleges in the future. Here are a few examples:

Mobile App: Developing a mobile app that integrates with the CRM application could improve communication and engagement with students, allowing them to access information and services from their mobile devices.

Artificial Intelligence: Implementing artificial intelligence (AI) could enhance data analysis and provide personalized support to students, such as offering tailored recommendations for courses and activities.

Virtual/Augmented Reality: Integrating virtual or augmented reality technology could enhance the student experience by providing immersive experiences, such as virtual campus tours or simulated classroom environments.

Predictive Analytics: Implementing predictive analytics could help institutions anticipate student needs and identify potential issues before they arise, enabling them to provide proactive support and improve student outcomes.

Integration with Learning Management Systems: Integrating the CRM application with the institution's learning management system (LMS) could improve the overall student experience, providing a seamless transition between administrative and academic systems.

Overall, these enhancements have the potential to further improve the effectiveness of a CRM application for schools/colleges, providing even more value to the institution and its stakeholders.