A CRM Application for school/college

OBJECTIVE : The main objectives of A CRM application school/ college using salesforce are to:

1. The project aim is to provide real-time knowledge for all the students who have basic of knowledge Salesforce and Looking for a real-time project.

2. Salesforce objects are database tables that permit you to store data that is specific to

an organization.

3. Relationships are created by creating custom relationship fields on an object.

4. A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

5. A CRM is system that helps schools manage the entire lifecycle of a potential customer sometimes also referred to as lead.

1.INTRODUCTION

1.1 OVERVIEW

The fundamental purpose of a CRM system is to **improve the customer experience**. Executing on this objective is the most sure-fire way to see positive results across your business. When you

make improved customer satisfaction the main goal for your CRM, all other objectives work to support this goal. Customer relationship management (CRM) is **a technology for managing all your company's relationships and interactions with customers and potential customers**. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

1.2 PURPOSE

A CRM (Customer Relationship Management) application for school purposes could be designed to help schools manage interactions with students and their families, as well as track academic progress and other important data. Here are some potential features and benefits of a CRM application designed for school use:

Contact Management: The application would allow schools to manage contact information for students and their families, including email addresses, phone numbers, and physical addresses. This would make it easier for schools to communicate with students and families about important updates, events, and deadlines.

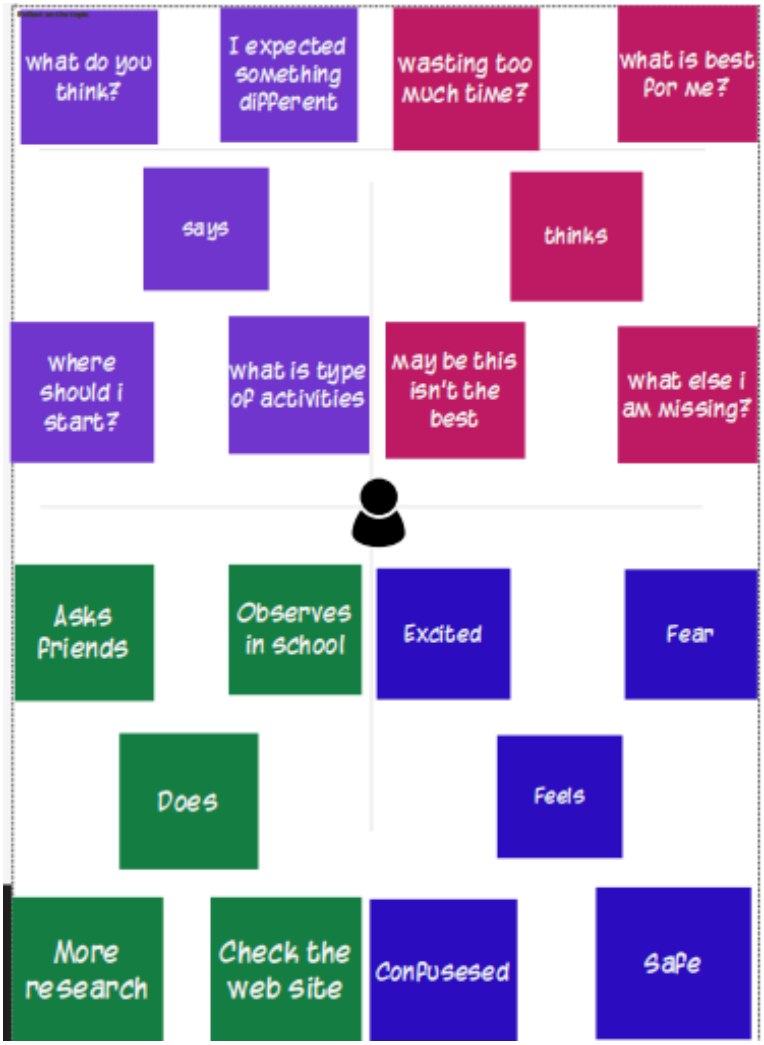
Enrollment Tracking: The application could track enrollment data for students, including their grade level, enrollment status, and academic program. This would help schools manage class sizes and ensure that students are enrolled in the appropriate programs.

Academic Tracking: The application could track academic progress for individual students, including grades, test scores, and other performance metrics. This would allow teachers and

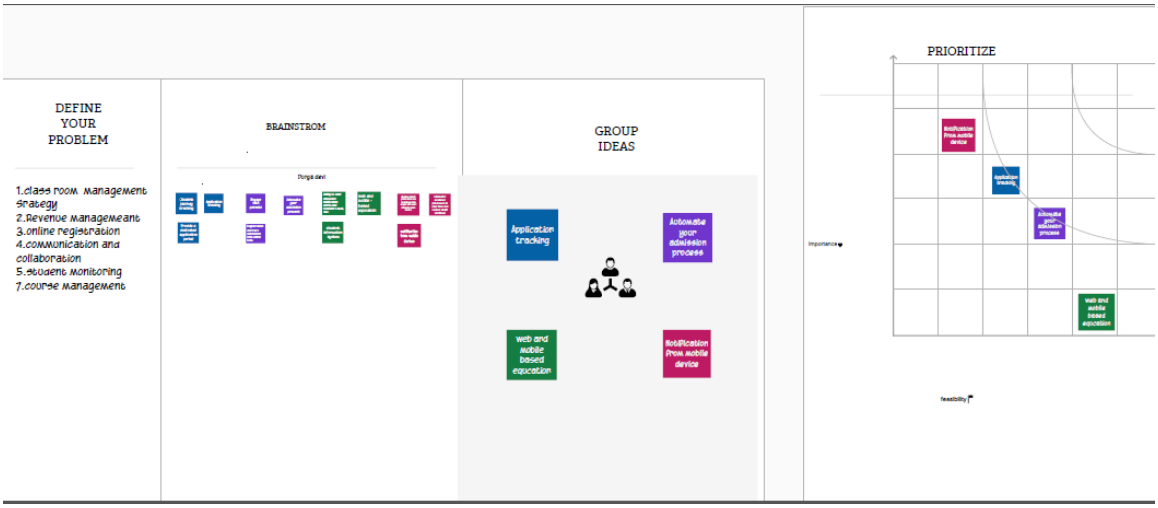
administrators to identify students who may be struggling and provide additional support to help them succeed.

Reporting: The application could generate reports on enrollment, academic progress, and other key metrics. This would help administrators make data-driven decisions and identify areas for improvement.

2. Problem definition & Design Thinking



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Modal

Object name	Fields in Object
Object 1 **School**	**Field label** / **Data type** Address / Text Area
Object 2 **Student**	**Field label** / **Data type** Phone number / Phone
Object 3 **Parents**	**Field label** / **Data type** Parent Address / Text Area

3.2 Activity & Screenshot

Milestone 1

Activity-Creating Developer Account

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

b. Emai

c. Role : Developer

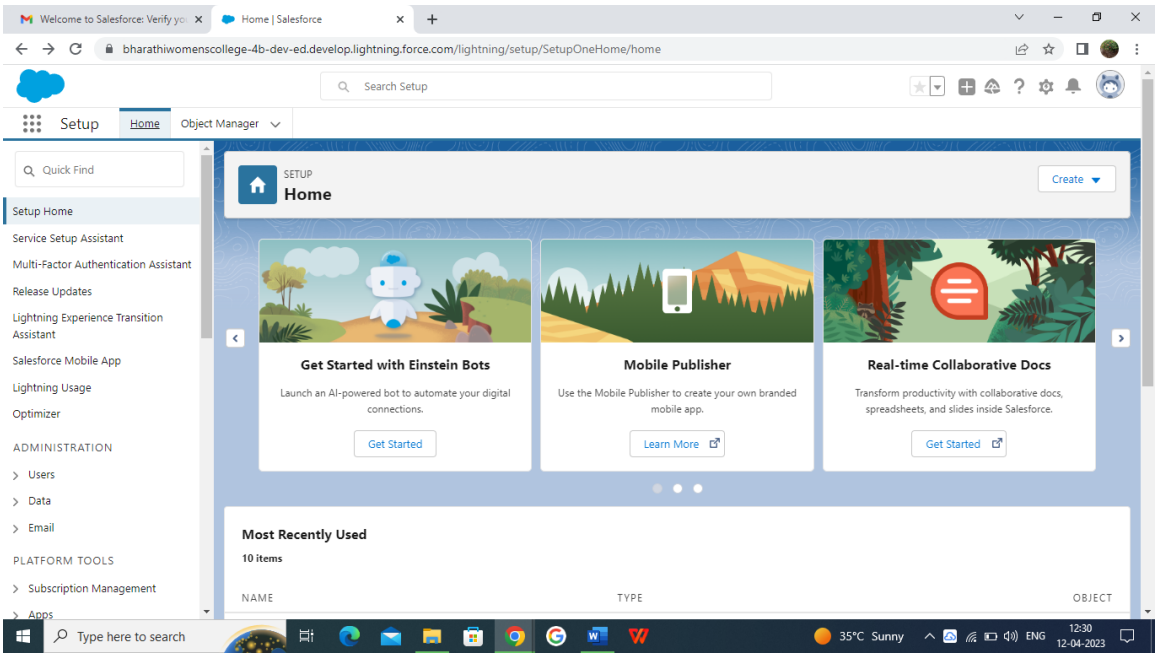
d. Company : College Name

e. County : India

f. Postal Code : pin code

g. 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



Milestone- 2 Object

Activity- 1 Creation of School 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: School
- Plural Label: Schools
- Record Name: School Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save

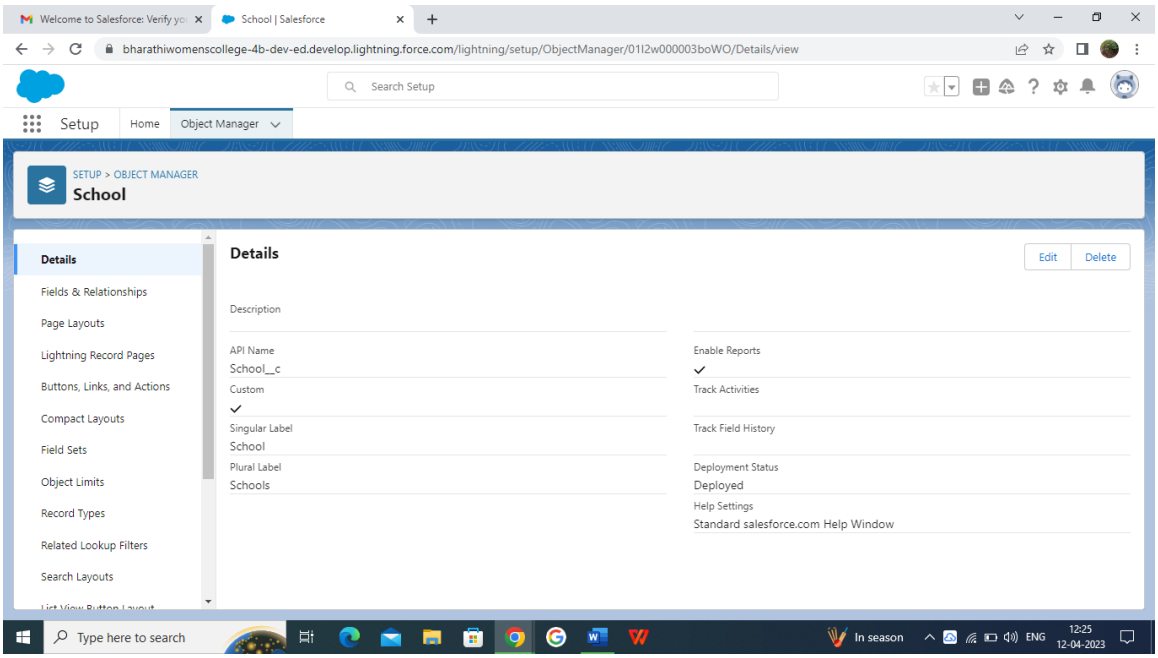
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select School.

2. For Tab Style, select any icon.

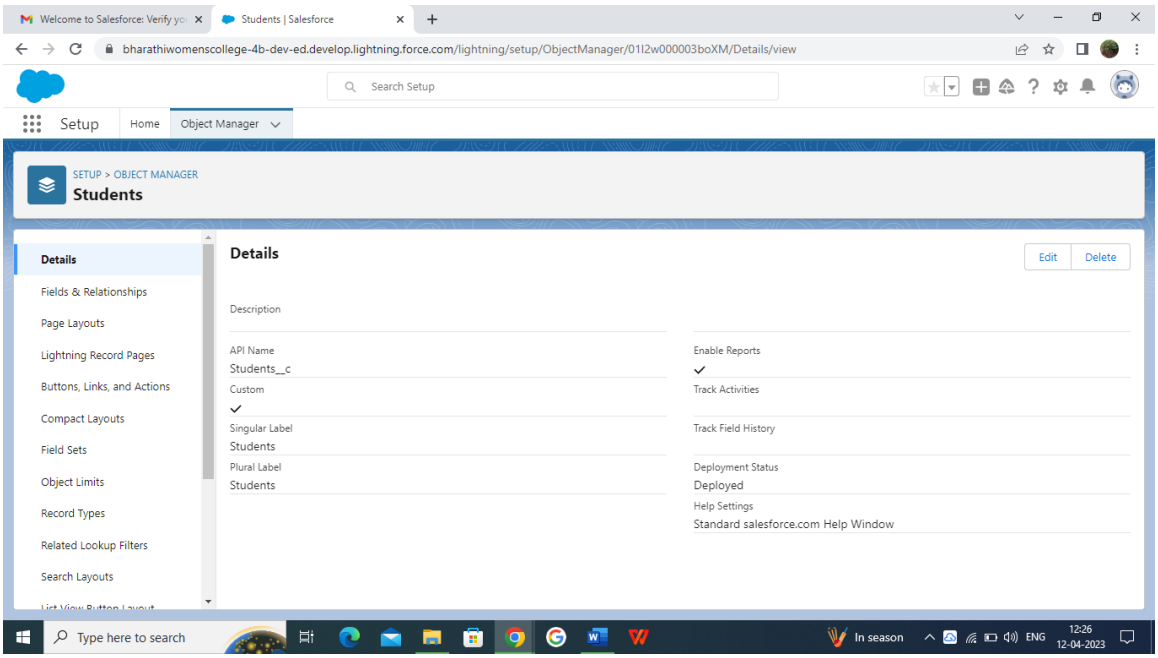
3. Leave all defaults as is. Click Next, Next, and Save.

In the same way create other objects such as students and parents.

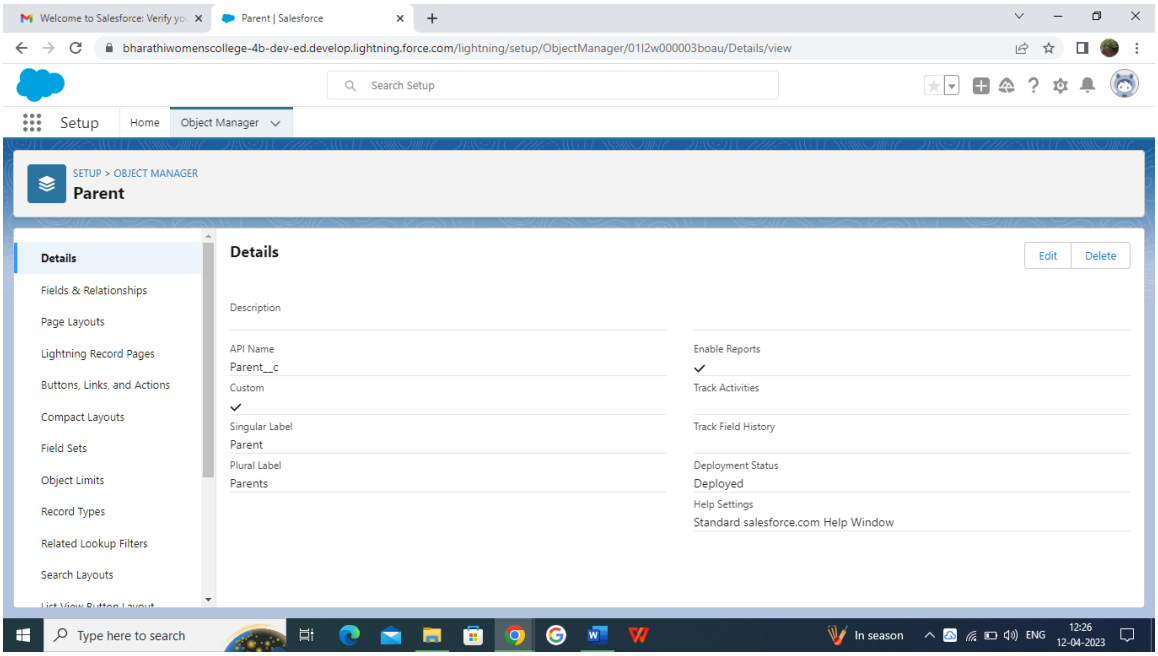


Activity- 2 Create of Student Object

- 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.



Activity-3 Create Parent 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.

Milestone 3 Lighting App

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

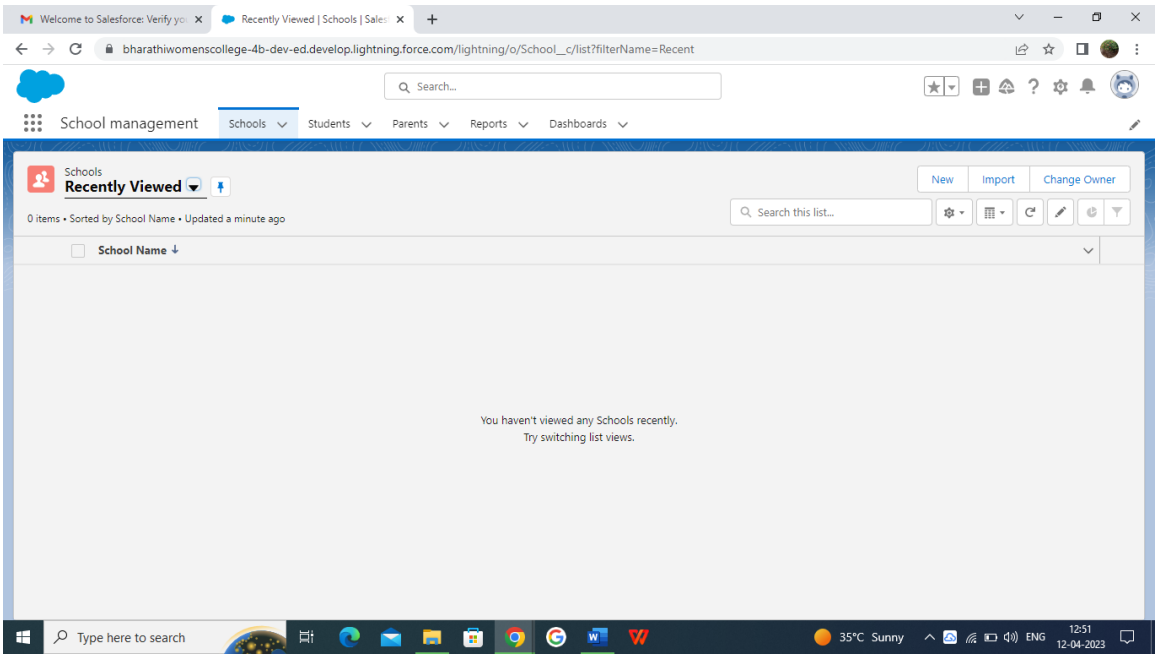
● Under App Options, leave the default selections and click Next.

● 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.



Milestone -4 Fields and Relationship

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.

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.

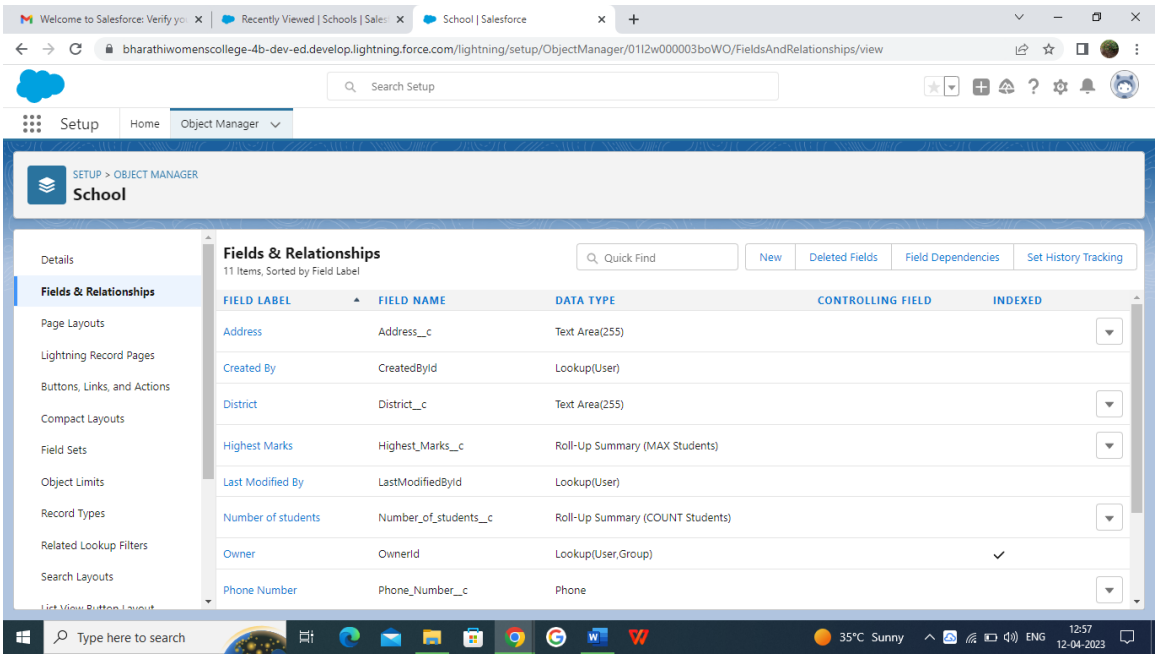
2. Click Fields & Relationships, then New.

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

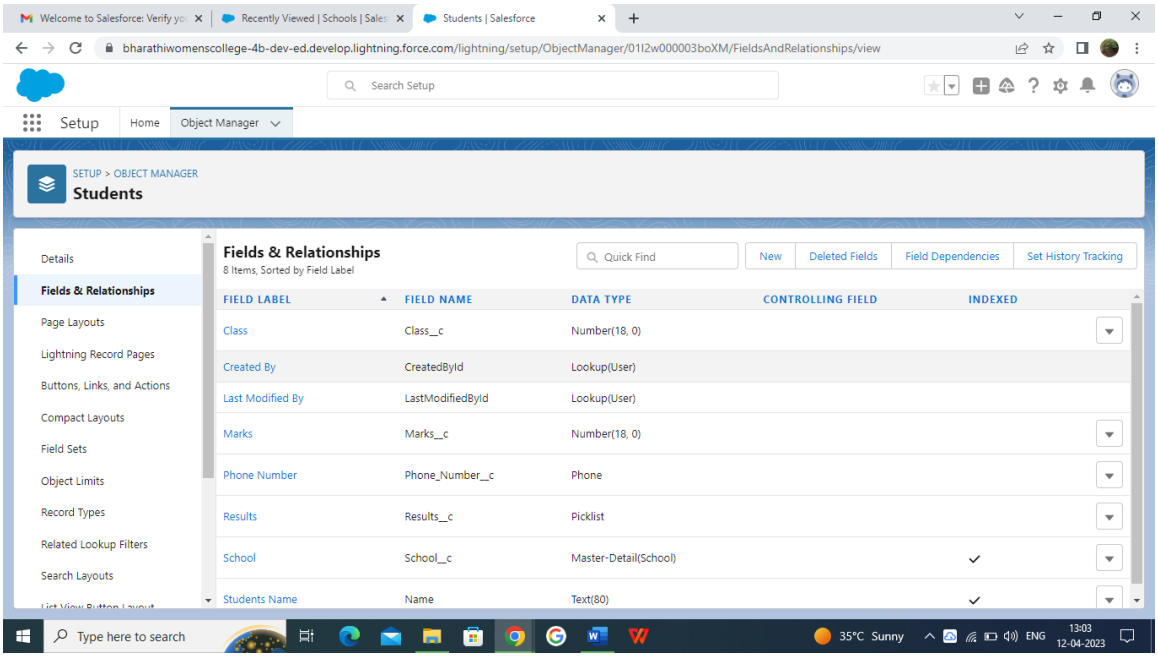
Lets create a Number field:

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.

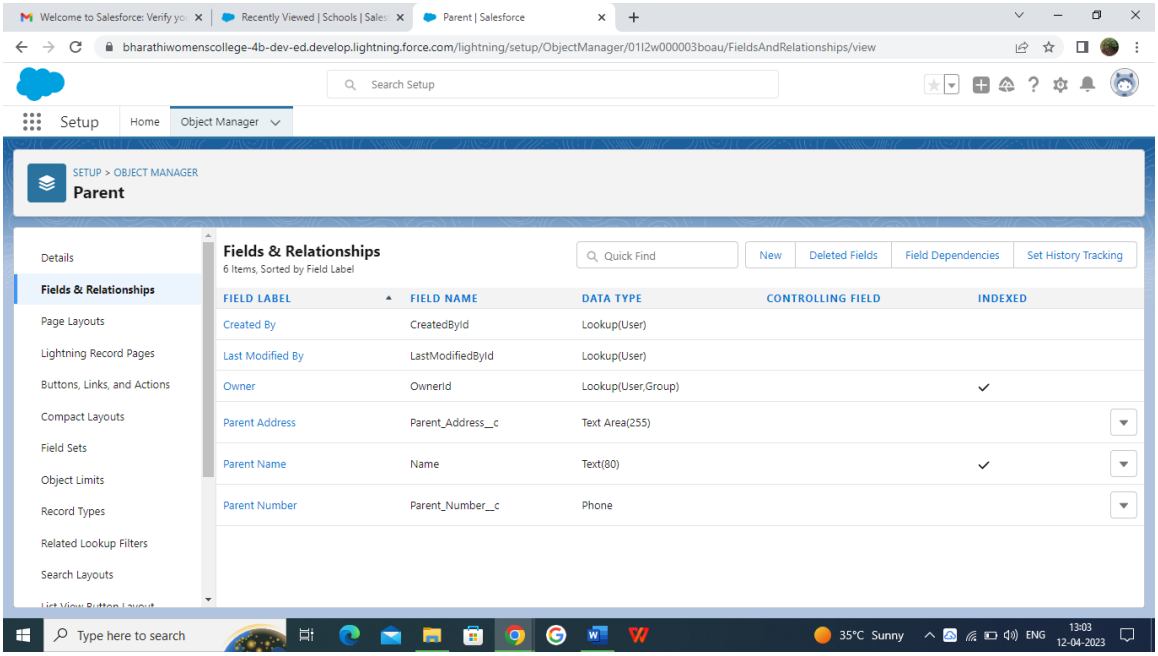
2. For Field Label, enter Parent Address.

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

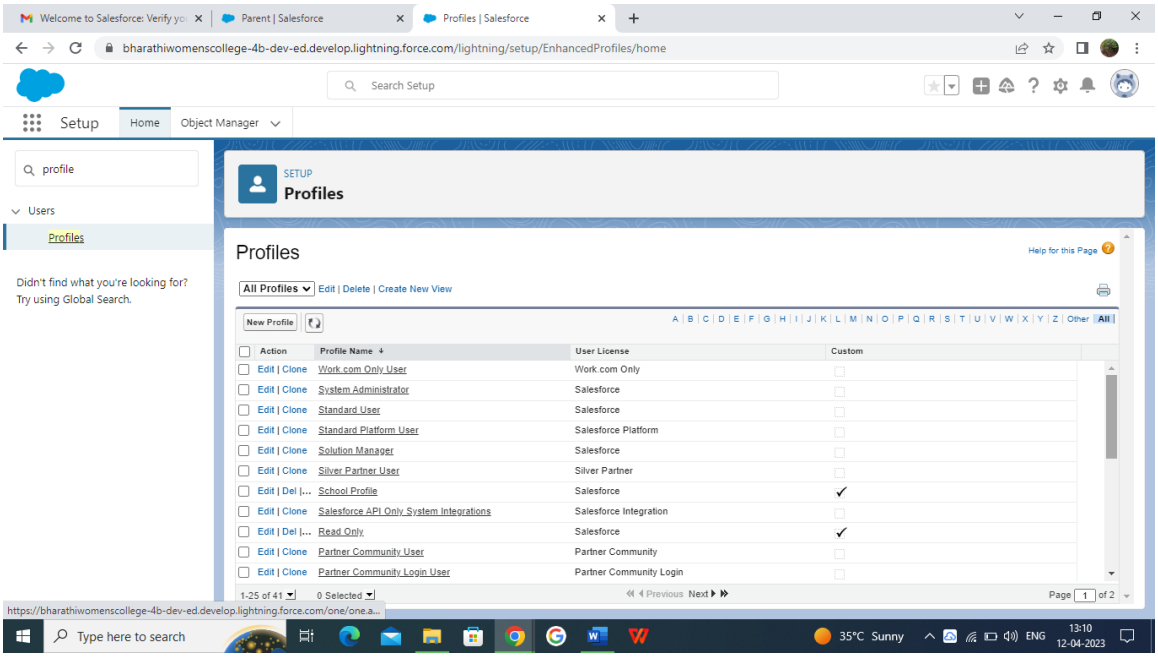
4. Select the Phone as the Data Type, then click Next.

5. For Field Label, enter Parent Number.

6. Click Next, Next, then Save & New



Milestone-5 ProfileActivity -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.

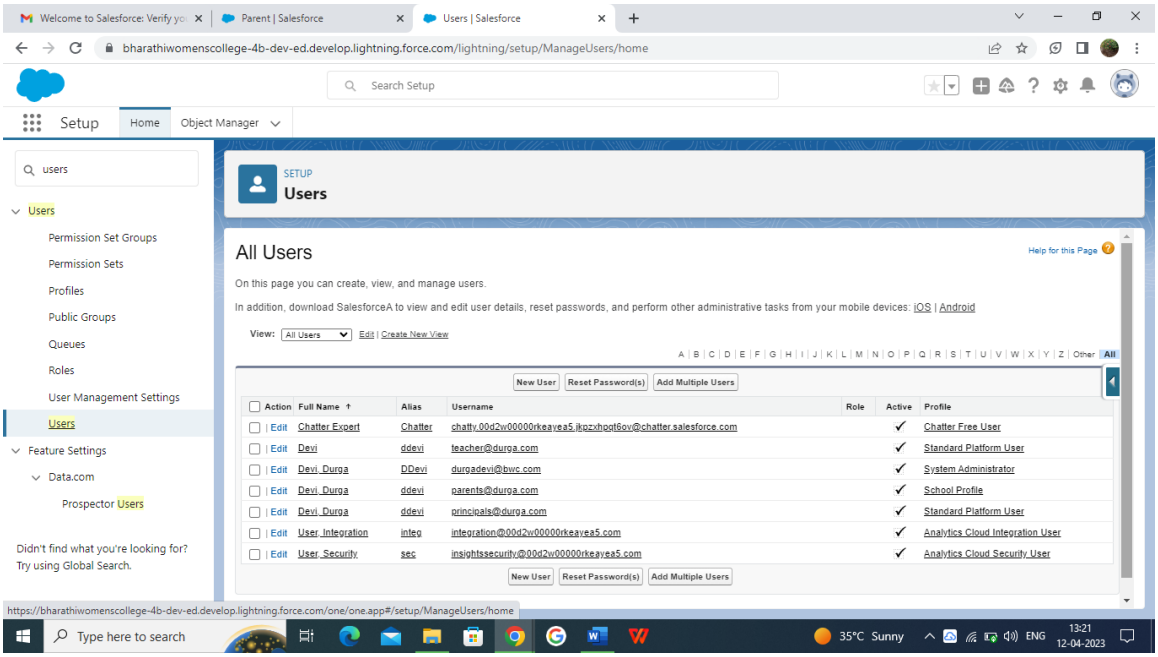
4. Click Save.

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

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.

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

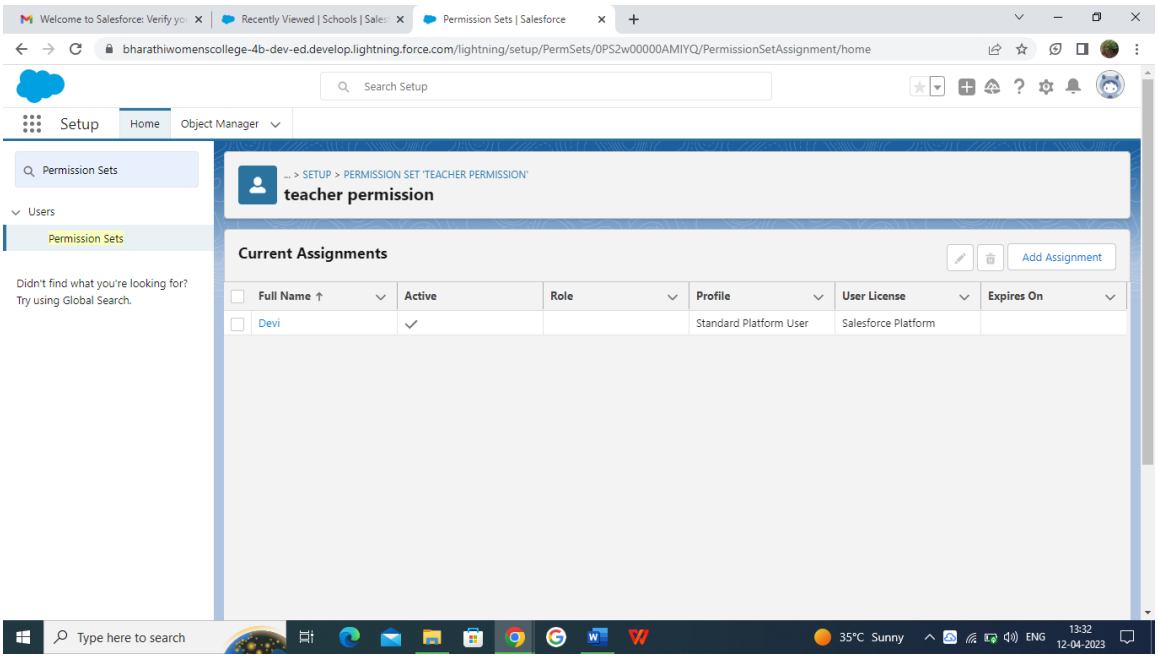
Milestone-7 permission Sets

Activity -1 permission Sets

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

2. Click New.3. Give 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. 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.

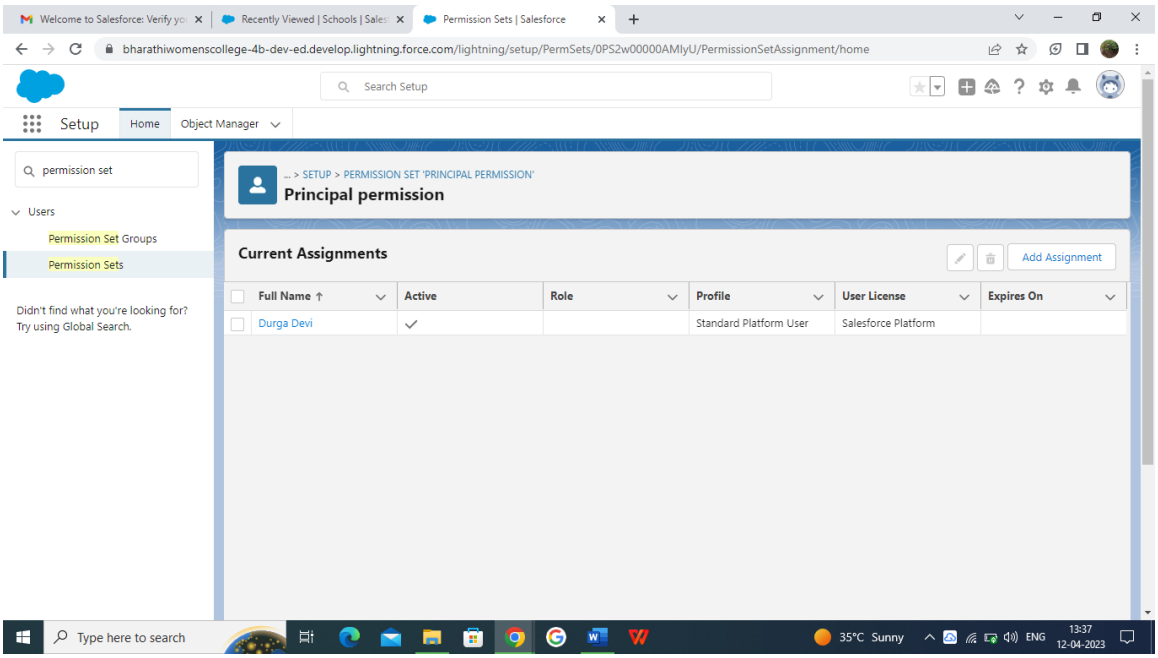


Activity -2 permission Set

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

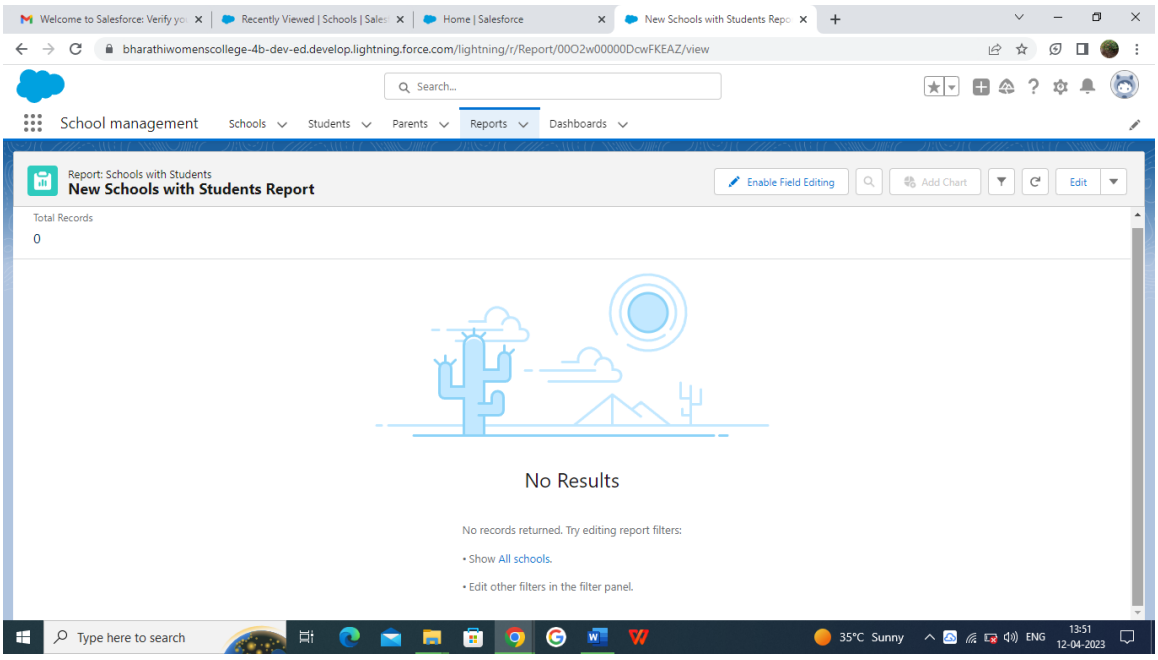
2. Click New.

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

Activity



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.

4 . Trailhead Profile Public URL

Team Leader

Durga Devi-https://trailblazer.me/id/ddevi185

Team Members

1.Gnaneswari P-https://trailblazer.me/id/gnanp5

2.Gunachithra-trailblazer.me/id/gunam11

3.Haribrinda-trailblazer.me/id/hbrindham

Advantages

5.ADVANTAGES & DISADVANTAGES

Enhanced Communication: A CRM application can enable better communication between teachers, parents, and students. Important notifications, announcements, and updates can be sent to the relevant parties using the application, thereby improving the overall communication process.

Improved Student Experience: A CRM application can improve the overall student experience by providing features such as online registration, online fee payment, and online course selection. This eliminates the need for students to physically visit the school, thereby saving time and effort.

Analytics and Reporting: A CRM application can generate reports and analytics on various parameters such as student attendance, grades and behavior. This can help teachers and administrators to identify areas of improvement and take corrective measures.

Scalability: A CRM application can be easily scaled up or down depending on the needs of the school. New features and functionalities can be added as required.

Disadvantages

Cost: Implementing a CRM application can be expensive, especially for smaller schools. The cost of licensing, installation, and maintenance can add up to a significant amount.

Complexity: Implementing a CRM application can be complex and time-consuming. It may require the school to hire external consultants to assist with the implementation and training.

Data Security: A CRM application can store sensitive information about students, teachers, and staff members. It is important to ensure that the application is secure and that access to the data is restricted to authorized personnel only.

User Adoption: A CRM application is only effective if it is used by all relevant parties. It may take time to train staff members, students, and parents on how to use the application effectively.

Dependence on Technology: A CRM application is dependent on technology, and any disruptions or outages can impact the functioning of the school. It is important to have backup systems and contingency plans in place to deal with such situations.

6. Application

Admissions: A CRM can be used to manage the admissions process, from tracking prospective students and their applications, to scheduling tours and interviews, to following up with accepted students.

Student Records: A CRM can be used to manage student records, including attendance, grades, and disciplinary actions. This information can be easily accessed by teachers, administrators, and parents.

Communication: A CRM can be used to manage communication with

parents and students, including sending out newsletters, updates on events and activities, and reminders of important deadlines.

Fundraising: A CRM can be used to manage fundraising efforts, including tracking donors and donations, sending out thank-you messages, and tracking the success of fundraising campaigns.

Alumni Relations: A CRM can be used to manage relationships with alumni, including tracking contact information, organizing alumni events, and keeping alumni up-to-date on news and developments at the school.

7.Conclusion

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

8.FUTURE SCOPES:

Personalized Learning: With the help of advanced analytics and data mining, a CRM application could help in identifying the learning patterns of individual students. Based on this data, the application could create personalized learning plans for each student.

AI and Chatbots: The application could integrate AI-powered chatbots to answer common queries from students and parents. This could free up school staff to focus on more complex tasks.

Predictive Analytics: The application could use predictive analytics to identify at-risk students and alert teachers and parents to take preventive measures.

Mobile Optimization: The application could be optimized for mobile devices, making it easier for students and parents to access the application from their smartphones or tablets.

Gamification: The application could incorporate gamification techniques to make learning more engaging and fun for students.

Integration with Other Systems: The application could be integrated with other systems such as learning management systems (LMS), school management systems (SMS), and student information systems (SIS).