

# Project Report Template

## A CRM Applications for School & College

### 1. INTRODUCTION

#### 1.1.What is a CRM for Education?

An education customer relationship management software (CRM) manages all your institution's interactions with prospective and current students. It also supports managing communications with alumni, employees, donors, and other members of the education sector in your institution. Education CRM software collects essential customer information from different channels and stores it in a single easy-to-access database.

Some of the information a CRM system might collect includes:

- Name
- Age
- Gender
- Educational background
- Contact information (e.g., email, phone number, and social media)

Using this data, you can personalize messages for your students across all channels.

#### 1.2.Purpose

##### 1. Manage Students Through Their Enrolment Journey

A CRM platform does that by helping you create a straightforward journey that assigns leads to specific enrolment officers within your organization. Using your staff at hand, you can create a reliable data capture and contact management system that keeps track of all your new enrolments and stores that information systematically. Contact management tools are especially useful for large institutions with multiple campuses across cities and states.

##### 2. Handle Student and Internal Communications and Inquiries

The right CRM software gives you sufficient tools for communication while also offering other opportunities for personalized and targeted messaging. Personalized sequences ensure that all your prospective students hear from you at the ideal time. Once a prospect responds in your desired manner, you can set up scheduled meetings or calls.

### **3. Measure the Progress of Your Institution.**

It helps you track your institution's progress, giving you valuable insights into different success metrics. Education CRMs can produce reports based on data analysis from all your students.

### **4. Monitor Fee Payments and Reminders.**

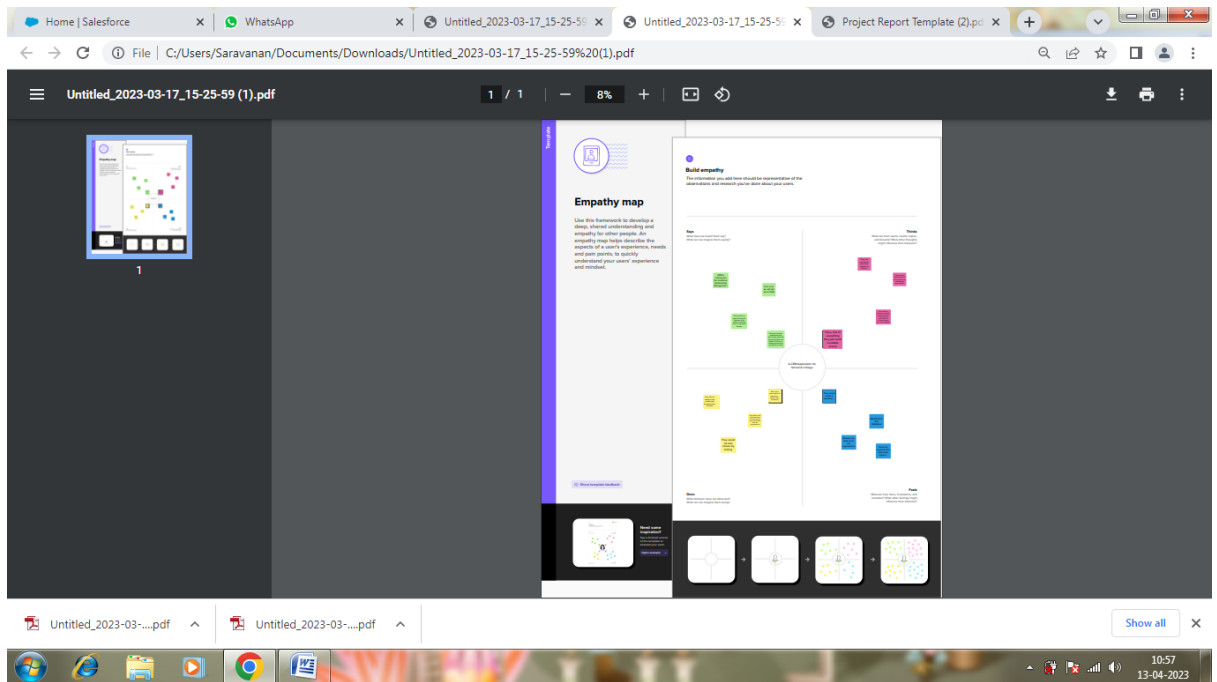
Education CRM's are used as solutions to track payments students make for their modules and courses. Besides showing how much you've collected from student payments; you can also tell how far or close you are from your financial targets. The right CRM software also helps you produce fee statements and manage reminders to students who haven't paid yet.

### **5. Measure Marketing ROI (Return on investment)**

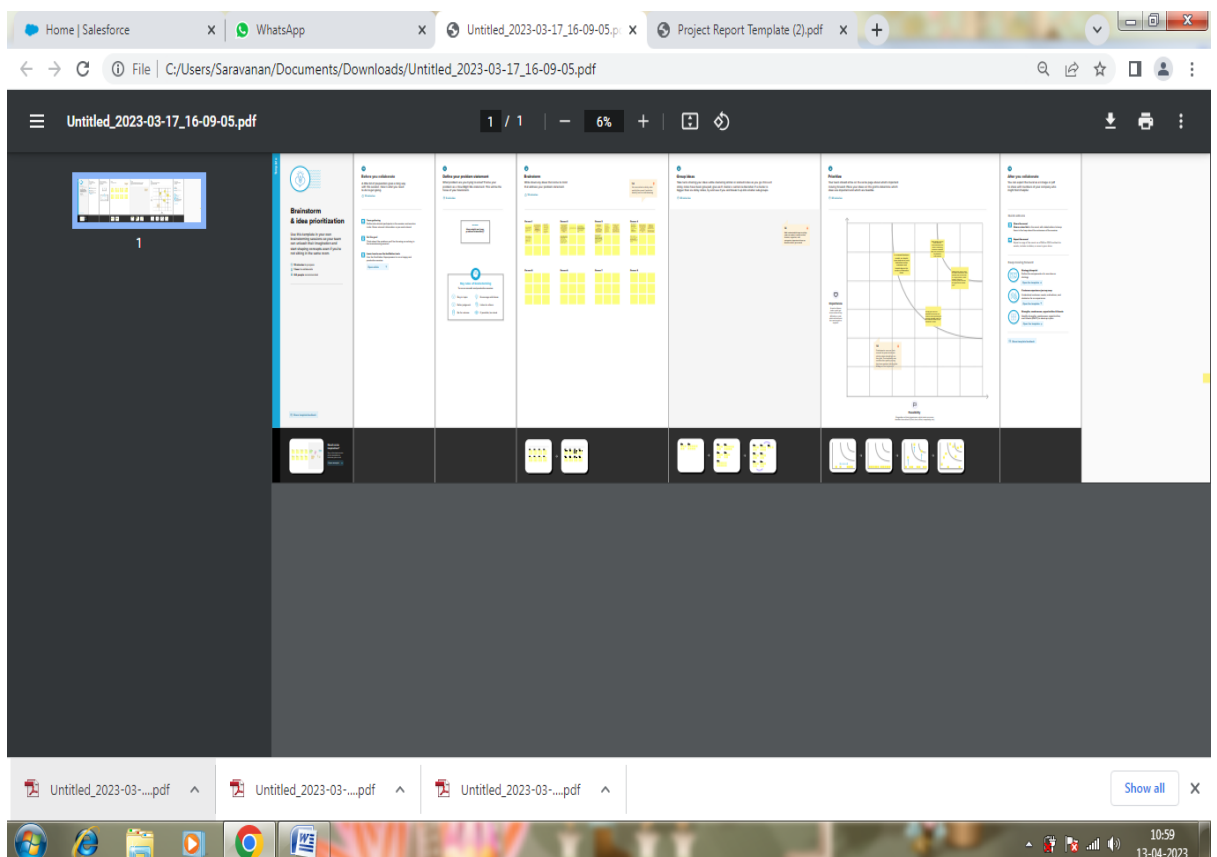
For Your institution Education CRMs can be an essential tool in your marketing process. Using analytics tools, you'll have a bird's eye view of the success of your marketing efforts and the ability to attribute your admission success to specific platforms.

## **2. Problem Definition & Design**

### **2.1. Empathy Map**



## 2.2 Ideation and Brainstroming Map



## 3.2 Activity & Screenshot

This screenshot shows the Salesforce Setup interface for the 'Student' object in the Object Manager. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main content area displays the 'Details' tab, which includes fields for API Name, Custom, Singular Label, Plural Label, and various checkboxes for Enable Reports, Track Activities, and Track Field History. The 'Deployment Status' is shown as 'Deployed'.

Setup > OBJECT MANAGER  
**Student**

**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

This screenshot shows the Salesforce Setup interface for the 'Student' object in the Object Manager, specifically the 'Fields & Relationships' tab. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main content area displays a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The table lists several fields, including '12345678', '6380815657', '9952116746', 'Account', 'Created By', 'Last Modified By', and 'Students Name'.

Setup > OBJECT MANAGER  
**Student**

**Fields & Relationships**

7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
12345678	X12345678__c	Phone		<input type="checkbox"/>
6380815657	X6380815657__c	Text Area(255)		<input type="checkbox"/>
9952116746	X9952116746__c	Text Area(255)		<input type="checkbox"/>
Account	Account__c	Master-Detail(Account)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Students Name	Name	Text(80)		<input checked="" type="checkbox"/>

Parent | Salesforce x WhatsApp x Untitled\_2023-03-17\_16-09-05.p... x Project Report Template (2).pdf x +

thiruvalluvgovernmentar-f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000036XXG/Details/view

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#) X

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

**Details** Edit Delete

Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters

**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

11:04  
13-04-2023

Parent | Salesforce x WhatsApp x Untitled\_2023-03-17\_16-09-05.p... x Project Report Template (2).pdf x +

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Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

**Fields & Relationships** Quick Find New Deleted Fields Field Dependencies Set History Tracking

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
1	X1_c	Text Area(255)		
45678	X45678_c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Name	Name	Text(80)		✓

https://thiruvalluvgovernmentar-f-dev-ed.develop.lightning.force.com/one/one...

11:04  
13-04-2023

School | Salesforce x WhatsApp x Untitled\_2023-03-17\_16-09-05.p x Project Report Template (2).pdf x

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Setup Home Object Manager

SETUP > 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

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

javascriptvoid(0);

11:05  
13-04-2023

School | Salesforce x WhatsApp x Untitled\_2023-03-17\_16-09-05.p x Project Report Template (2).pdf x

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Setup Home Object Manager

SETUP > OBJECT MANAGER  
School

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
250	X250__c	Auto Number		
450	X450__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
School Name	Name	Text(80)		✓

11:05  
13-04-2023

Setup | Salesforce x WhatsApp x Untitled\_2023-03-17\_16-09-05.p... x Project Report Template (2).pdf x +

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Search Setup

Setup Home Object Manager

Q Tabs

User Interface

Rename Tabs and Labels

Tabs

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

## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

### Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit   Del	Parents	People	
Edit   Del	Schools	Globe	
Edit   Del	Students	Chess piece	

### Web Tabs

New What Is This?

No Web Tabs have been defined

App Manager | Salesforce x WhatsApp x Untitled\_2023-03-17\_16-09-05.p... x Project Report Template (2).pdf x +

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Search Setup

Setup Home Object Manager

Q app manager

Apps

App Manager

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

## Lightning Experience App Manager

New Lightning App New Connected App

### Clone Apps(Beta)

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](#)

Enable App Cloning ☐ Disabled

23 items • Sorted by Description • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified	Ap...	Vi...
1 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experie...	10/03/2023, 1:06 pm	Lightning	✓
2 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and m...	10/03/2023, 1:06 pm	Lightning	✓
3 Sales	Sales	The world's most popular sales force automation (SFA) s...	10/03/2023, 1:06 pm	Classic	✓
		The Salesforce Chatter social network, including profiles...	10/03/2023, 1:06 pm	Classic	✓

School Management - Lightning x WhatsApp x Untitled\_2023-03-17\_16-09-05.p... x Project Report Template (2).pdf x +

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To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#)

Lightning App Builder App Settings Pages School Management ? Help

### App Settings

#### App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

#### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

##### App Details

\* App Name <sup>?</sup>  
School Management

\* Developer Name <sup>?</sup>  
SchoolManagement

Description <sup>?</sup>  
Enter a description...

##### App Branding

Image <sup>?</sup>

Primary Color Hex Value <sup>?</sup>  
#0070D2

Upload

Org Theme Options  
☐ Use the app's image and color instead of the org's custom theme

##### App Launcher Preview

SM School Management

Profiles | Salesforce x WhatsApp x Untitled\_2023-03-17\_16-09-05.p... x Project Report Template (2).pdf x +

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Setup Home Object Manager

Search Setup

profiles

Users

Profiles

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

### SETUP Profiles

#### Profiles

[All Profiles](#) [Edit](#) [Delete](#) [Create New View](#)

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Del  ...	1234	Analytics Cloud Integration User	
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	

1-25 of 42 0 Selected Previous Next Page 1 of 2



Users | Salesforce

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Setup Home Object Manager

users

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings

Users

Feature Settings  
Data.com  
Prospector Users

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

## Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatter.D0d2w00000ritfea1.gxtbuwqwgdtc@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	S. GAYATHRI	GS	gayathris@iysc.com		✓	System Administrator
<a href="#">Edit</a>	S. Gayathri	ga	gayathrisasan07@gmail.com		✓	Standard Platform User
<a href="#">Edit</a>	User Integration	intep	integration@00d2w00000ritfea1.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightsecurity@00d2w00000ritfea1.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Permission Sets | Salesforce

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Setup Home Object Manager

permisi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

## Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

**All Permission Sets** [Edit](#) [Delete](#) [Create New View](#)

[New](#) [Download](#)

Action	Permission Set Label ↑	Description	License
<a href="#">Del</a> <a href="#">Clone</a>	1234		
<a href="#">Clone</a>	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<a href="#">Clone</a>	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<a href="#">Clone</a>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<a href="#">Clone</a>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<a href="#">Clone</a>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User

1-25 of 28 0 Selected

Page 1 of 2

Reports | Salesforce

thiruvalluvargovernmentar-f-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#)

Search...

Salesforce Chatter Home Chatter People Groups Files Schools Students Parents Reports

Reports

Recent

4 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Accounts with Partners Report		Private Reports	GAYATHRI S	30/3/2023, 9:36 am	
Created by Me	New Accounts Report		Private Reports	GAYATHRI S	30/3/2023, 9:34 am	
Private Reports	New Contacts & Accounts Report		Private Reports	GAYATHRI S	30/3/2023, 9:33 am	
Public Reports	New Contacts & Accounts Report		Private Reports	GAYATHRI S	30/3/2023, 9:31 am	
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						

Home | Salesforce

thiruvalluvargovernmentar-f-dev-ed.develop.lightning.force.com/lightning/page/home

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Search...

Salesforce Chatter Home Chatter People Groups Files Schools Students Parents Reports

Quarterly Performance

CLOSED ₹23,75,000 OPEN (>70%) ₹6,65,000 GOAL --

3.5M  
2.8M  
2.1M  
1.4M  
700K  
0

Jan Feb Mar

Closed Goal Closed + Open (>70%)

Assistant

Nothing needs your attention right now. Check back later.

Today's Events Today's Tasks

## 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/gayu0704>

Team Member 1 - <http://trailblazer.me/id/kayab7>

Team Member 2 - <https://trailblazer.me/id/shalk24>

Team Member 3 - <http://trailblazer.me/id/gobis4>

Team Member 4 - <https://trailblazer.me/id/sri362003>

## 5 ADVANTAGES & DISADVANTAGE ADVANTAGES

- Improve and manages Student Admissions...
- Track Student Life-Cycles Within the Institution...
- Keep Alumni Information Safe and Accessible...
- Monitor Fee Payments and Reminders...
- Track and Gain Insight on Organization-Wide Data and Proce
- Reduce Operational Costs.
- Handle Student Enquiries.
- Streamline Teacher Evaluations.
- Build Long Lasting Alumni Relations.
- MIS(Management Information System) Reports

## DISADVANTAGES

- Customer experience may worsen due to staff over-reliance on the system.
- Security and data protection issues with centralised data.
- The excess initial time and productivity cost at the implementation.
- Requires a process-driven sales organisation.

- CRM may not suit all businesses.
- Burdensome data entry
- Dependent on proper setup
- Focused on the wrong person
- Can be costly
- A waste of time if used incorrectly

## 6 APPLICATIONS

Can be used in educational institutions, employment-based industries, hospitals and etc.

- Generate and manage website traffic.
- Qualify leads and respond to inquiries.
- Manage applications and qualify leads for admission.
- Providing you with chatbots or live chat to help you gather student feedback or their queries in real-time.
- Empowering students to book appointments with ease to follow up on their queries.
- Enabling you to use email automation to connect with students in an instant, whether it's marketing messages or news.
- Allows us to even analyse about the institution.

## 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. However, in order to be successful in these aims, the different

company departments have to work together and use measures in a coordinated fashion. This purpose is achieved via a customer database which is analysed and updated using CRM software. This approach will be of particular interest to companies and institutions operating in highly competitive markets where it is difficult to attract new customers.

## 8 FUTURE SCOPE

- A.I based CRM's
- Automated of completion of tasks
- Advances teaching and learning patterns
- Customization and personalization.