A CRM APPLICATION FOR SCHOOLS

1. INTRODUCTION:

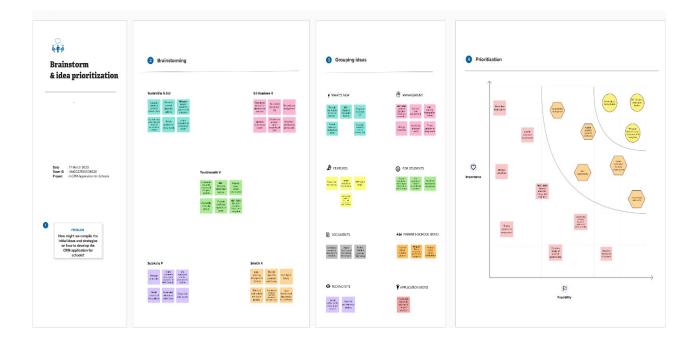
4 OVERVIEW:

In this project we have created a "**School Management**" application which is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

PURPOSE:

The main purpose of our project is to create a digital educational platform which, allow the effective use of available educational institution resources, and students and teachers would be allowed to use modern technologies in practice.

2. PROBLEM DEFINITION AND DESIGN THINKING:

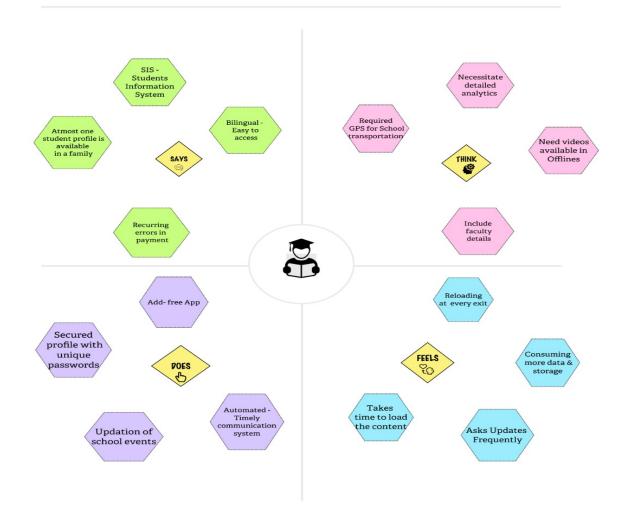


♣ EMPATHY MAP:



EMPATHY MAP

Date : 17 March 2023
Team ID : NM2023TMID06520
Project : A CRM Application for Schools



3. RESULT:

DATA MODEL:

Object Name	Fields in the Object	
	Field label	Data Type
School	Address	Text Area
	District	Text Area
	State	Text Area
	School Website	Text Area
	Phone Number	Phone
	Number of Students	Roll-up summary
	Highest Marks	Roll-up summary
	Field label	Data Type
Student	Phone Number School	Phone Master-Detail
	SCHOOL	Relationship
	Results	Picklist
	Class	Number
Parent	Field label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

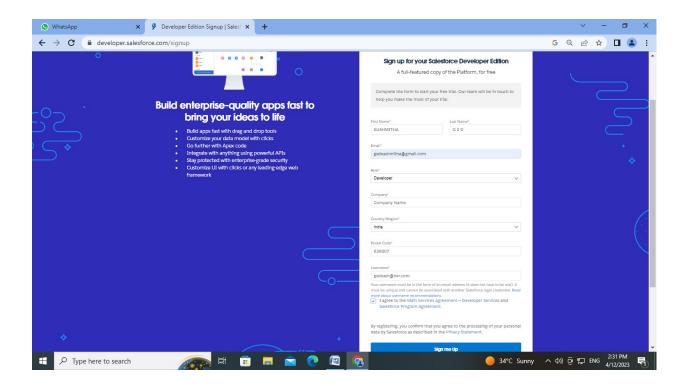
ACTIVITY AND SCREENSHOT:

MILESTONE 1:

ACTIVITY: Creating Developer Account

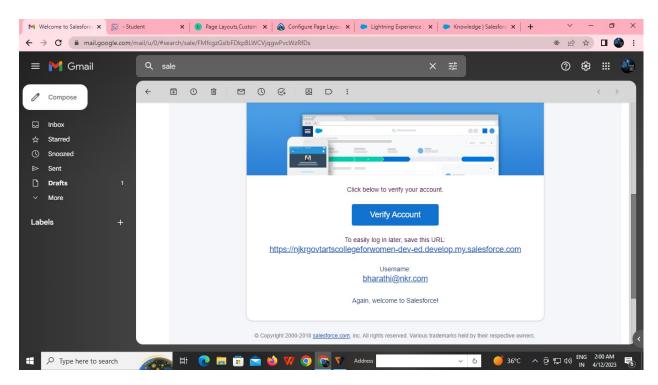
Creating a developers account is the first milestone of the "School Management App".

"Creating a developers org"



In the link https://developer.salesforce.com/ we created a salesforce account by entering the appropriate details.

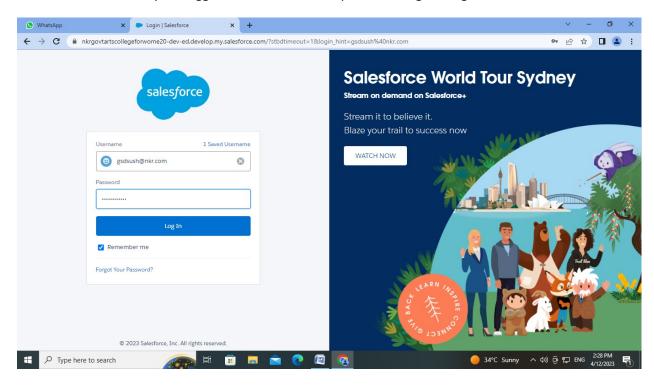
Account Activation:



From our mail we verified the accounts by creating a new passwords.

Login to the account:

In this milestone, finally we logged into the salesforce platfom using our login credentials.



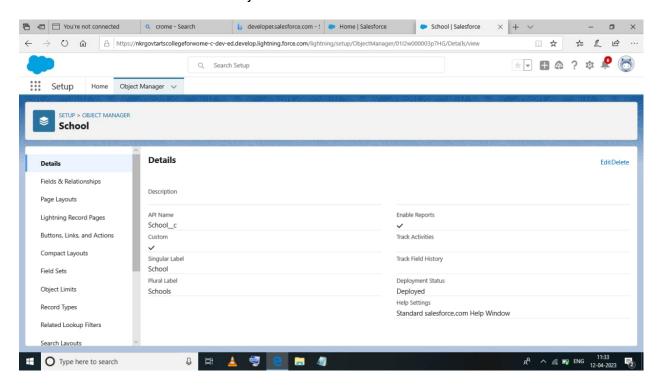
MILESTONE 2: Object

Creation of objects are the milestone 2.

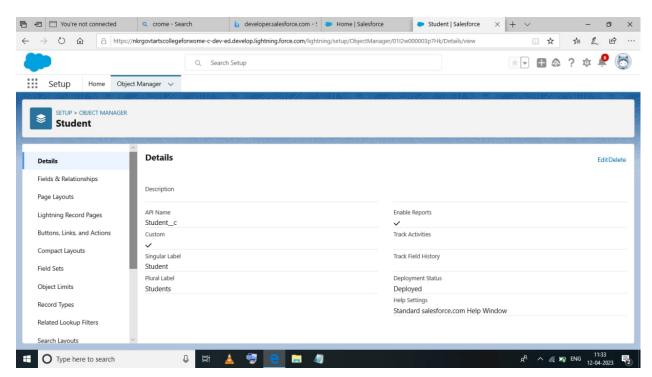
"Salesforce objects are database tables permits us to store data that is specific to an organization."

In the Salesforce platform. Under the object manager which is near to home tab, we create the custom objects i.e. School, Student and Parent.

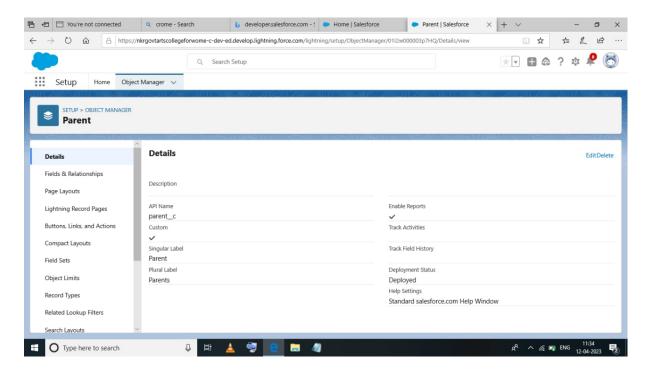
ACTIVITY - 1: Creation of School Object



ACTIVITY – 2: Creation of Student Object



ACTIVITY – 3: Creation of Parent Object



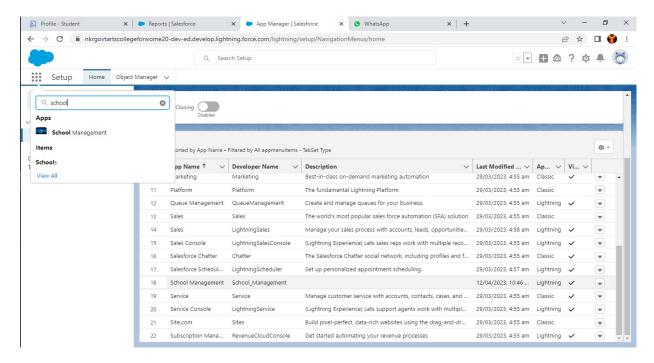
MILESTONE 3:

Creating a lightning app is our third milestone.

"Apps in salesforce are the group of tabs that help the application function by working together."

We create our "School Management" app by clicking a new lightning app in the app manager and enter the respective details which are needed to be displayed in the application such as schools , students , parents , dashboards and reports.

ACTIVITY: Creation of School Management App



MILESTONE 4: Fields and Relationship

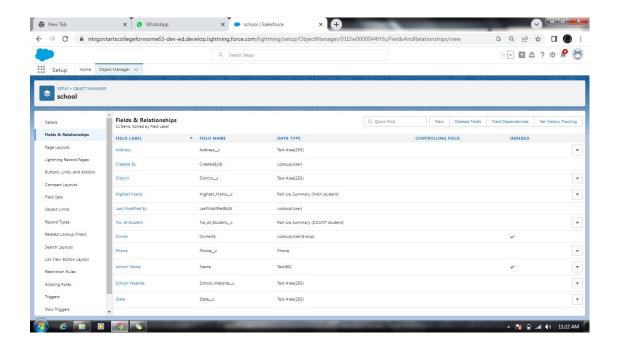
This milestone paves way for the creation of the fields.

"By creating the fields and relationship the users can view records, they can also see and access the related data."

We created the fields for the custom objects i.e. Schools, Students and Parents.

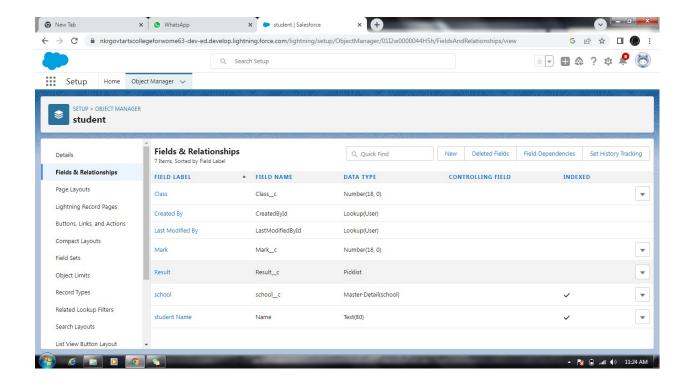
ACTIVITY - 1: Creation of Fields for the School Object

For the custom object schools, having **text area** as the data type we created Address, District, State and School websites.



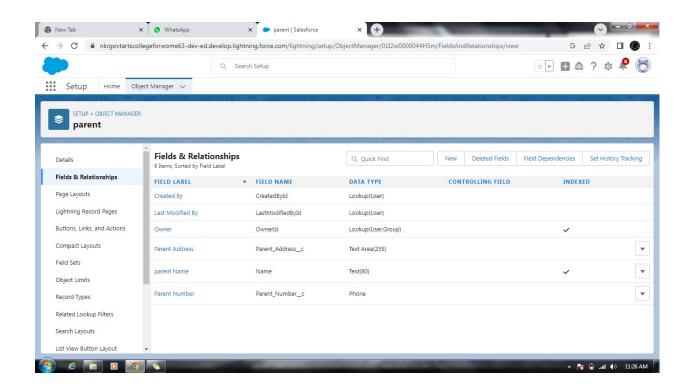
ACTIVITY - 2: Creation of Fields for the Student Object

For the custom object student, we created field labels such as **Phone number, School, Results, Class** with appropriate data types.



ACTIVITY - 3: Creation of Fields for the Parent Object

For the custom object parents, having **text area and phone** as the data types we created Parent address and Parent number.



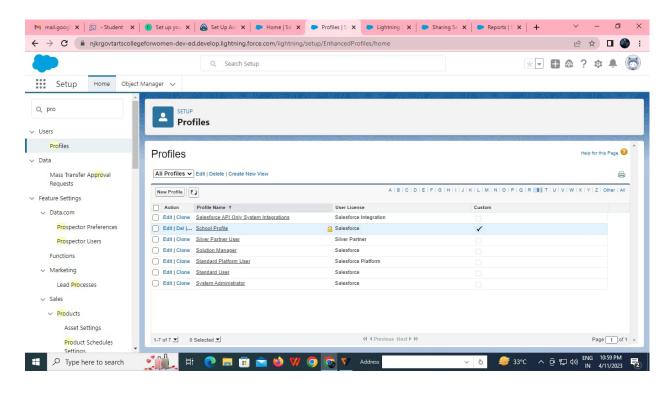
MILESTONE 5: Profile

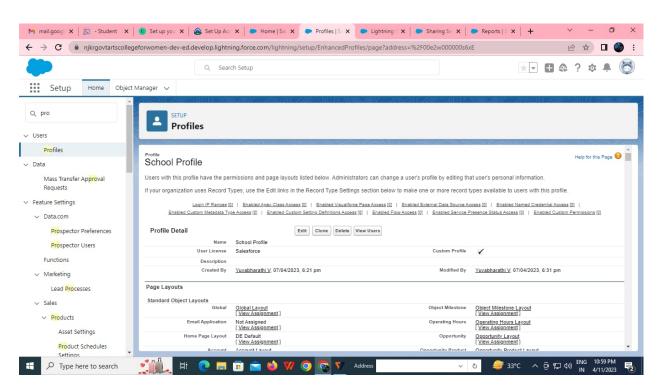
Our 5th milestone is to create a profile for the application.

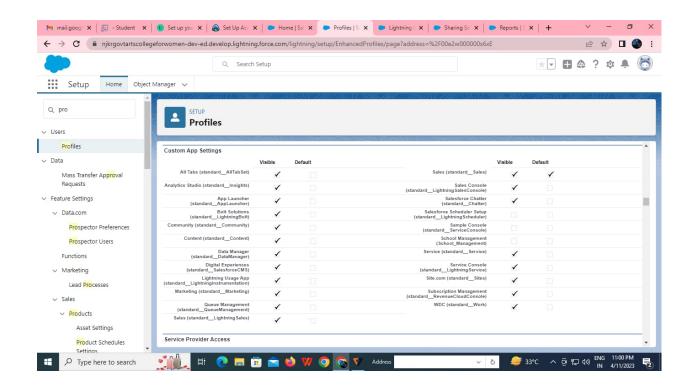
"A profile is a collection of settings and permissions that defines what a user can do."

We created the School profile of our application and enabled the custom object permission **view all access** to the parent profile.

ACTIVITY: Creation of Profile







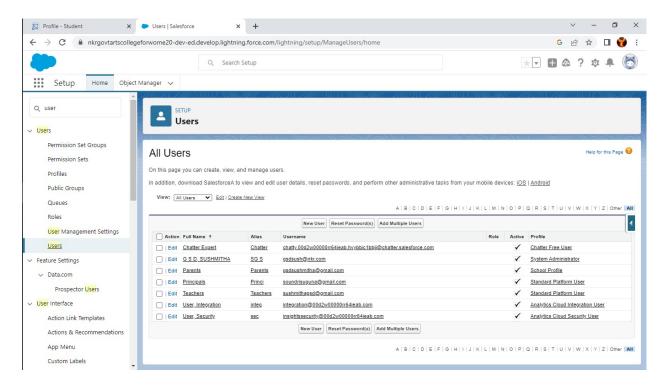
MILESTONE 6: Users

This milestone focuses on creating users.

"A user is the one who has the authority to access the application."

In this School management app, the users are Teachers, Principals and Parents. We created the user profile as **school** and **salesforce** as the user license for all the three users which are mentioned above.

ACTIVITY: Creation of Users



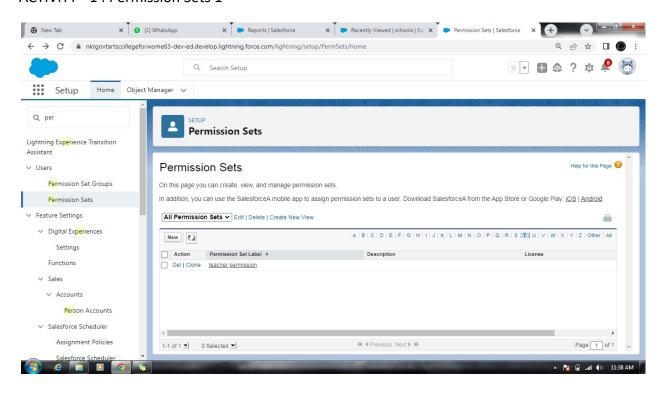
MILESTONE 7: Permission Sets

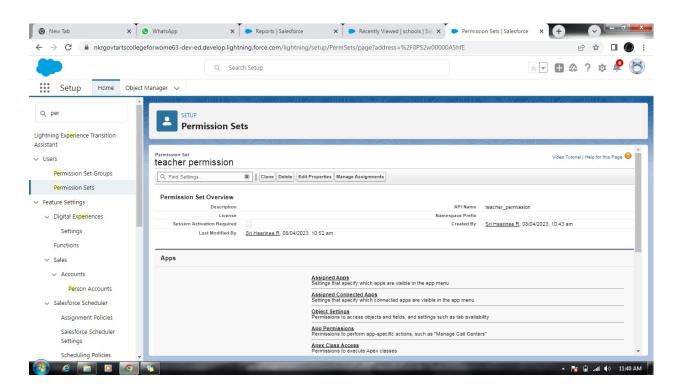
In this milestone we set the permissions to the users.

"Permission sets allow the users to perform collection of settings and permissions."

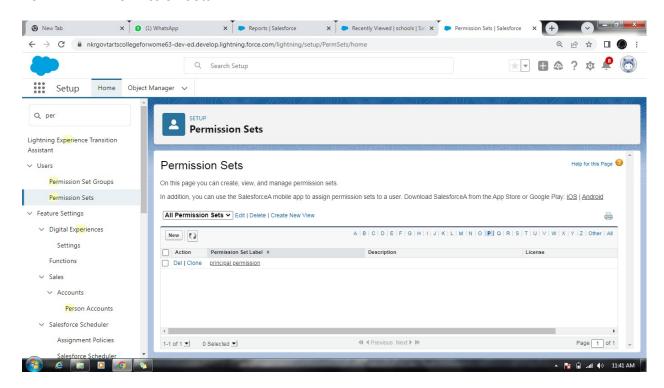
Permission sets are assigned only to the particular users i.e. **Teachers and Principals.** In this permission sets , under object settings we allow view , create and edit permissions to all custom objects for teacher user and similarly the steps are done to the principal profile.

ACTIVITY - 1: Permission Sets 1





ACTIVITY - 2: Permission Sets 2



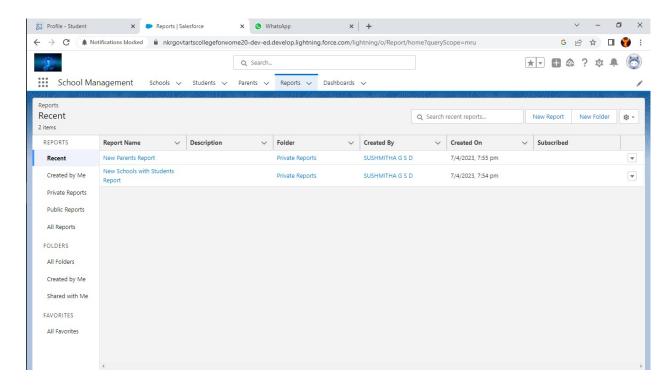
MILESTONE 8: Reports

In our CRM application "Report" is the final stage.

"A report is a list of records that meet the criteria you define."

We generated the new report by creating **School with students and Parents** as the report types and save & run is given and the report is saved .

ACTIVITY:



4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead:

Sushmitha G. S. D: https://trailblazer.me/id/sushgsd

Team members:

Sri Haarinee R : https://trailblazer.me/id/srihr3

Subiksha P : https://trailblazer.me/id/subip2

Srinithi K : https://trailblazer.me/id/srink59

Yuvabharathi V : https://trailblazer.me/id/yuvav9

5. ADVANTAGES AND DISADVANTAGES:

Advantages:

- CRM for educational institutions tracks and automates the tasks involved in the admission process, such as gathering and storing applicants' data, sending messages to inform about their enrollment status, etc.
- **Fast responses**: When a prospective student sends a message via the college website contact page or on social media, the CRM platform makes it easy for staff members to respond immediately.
- Enhanced student lifecycle experience: CRM software provides benefits throughout the entire student journey from the first class through graduation, career planning, and placement.
- **Communication tools**: Stay in touch with students, parents, staff, and alumni using email, SMS, and other communication channels.
- **Reporting tools**: Use a dashboard to gain valuable insights into operations and make data-driven decisions that support student retention.

Disadvantages:

- Loss of collected information or records: CRM (customer relationship management) tools can be responsible for losing the customer's information as some CRM software keeps track of customers' information using remote internet connections.
- It eliminates the human element: CRM is a fully automated tool that has prevented human intervention. It automatically collects all the data and processes it. CRM efficiently manages the relationship between the company and customers as it directly interacts between people and its staff. Customers can shift anywhere due to the loss of human touch, reducing sales and revenue.
- Can be accessed by the third party: As we know, CRM collects customers' sensitive information and stores it, which other parties can misuse. For example, web hosting companies take and sell collected data to a third party and causes loss to people.
- CRM is not fully customized: A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.
- Have poor usability: Some CRM systems could be more user-friendly as users need to learn how to use CRM to save time and energy to make the system work according to them. Some small businesses try to refrain from using CRM as they need help handling it.

6. APPLICATIONS:

Using CRM in education industry provides organisations 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.

7. CONCLUSION:

Thus, we have created a "**School Management**" application which is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

8. FUTURE SCOPE:

It interprets and clarifies the functions and the activities of an educational programme in fruitful relationships and harmonizes their mutual action. It ensures sound planning, good direction and efficient and systematic execution.