

PROJECT REPORT

THE CRM APPLICATION FOR SCHOOLS AND COLLEGES

1 INTRODUCTION

1.1 OVERVIEW

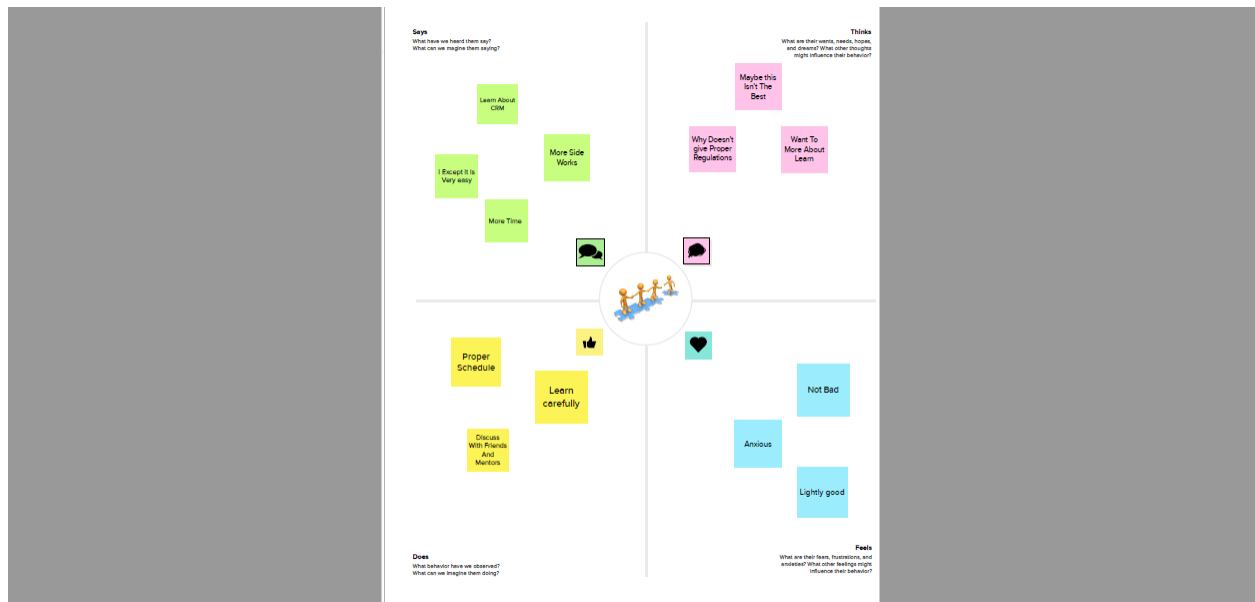
CRM stands for customer relationship management and for schools and colleges, a single CRM solution can be implemented to unify and to manage all contacts from prospective students to enrolled students to alumni and donors. CRM helps to easily contact with parents. Centralizing this data allows schools to have a 360 degree view of their constituents.

1.2 PURPOSE

- To manage their lead funnel by automating lead capture, lead scoring, and lead nurturing.
- Integrate with student information systems, learning management systems, and financial management systems.
- communication between school and parents via email, SMS, and social media integration.
- Provides lead management, student and parent profiles, communication tools, analytics and reporting, and integration with other systems.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



[illegible]

3 RESULT

3.1 DATA MODEL

<i>Object name</i>	<i>Fields in the object</i>										
<i>School object</i>	<table><tr><th><i>Field label</i></th><th><i>Data type</i></th></tr><tr><td>1.Address 2.District 3.State 4.School websites</td><td>Test Area</td></tr><tr><td>1.Phone Number</td><td>Phone</td></tr><tr><td>1.Number of Students 2.Highest mark</td><td>Roll Up Summary</td></tr></table>	<i>Field label</i>	<i>Data type</i>	1.Address 2.District 3.State 4.School websites	Test Area	1.Phone Number	Phone	1.Number of Students 2.Highest mark	Roll Up Summary		
<i>Field label</i>	<i>Data type</i>										
1.Address 2.District 3.State 4.School websites	Test Area										
1.Phone Number	Phone										
1.Number of Students 2.Highest mark	Roll Up Summary										
<i>Student object</i>	<table><tr><th><i>Field label</i></th><th><i>Data type</i></th></tr><tr><td>1.Phone Number</td><td>Phone</td></tr><tr><td>1.School</td><td>Master Detail Relationship</td></tr><tr><td>1.Results</td><td>Pick List</td></tr><tr><td>1.Class 2.Mark</td><td>Number</td></tr></table>	<i>Field label</i>	<i>Data type</i>	1.Phone Number	Phone	1.School	Master Detail Relationship	1.Results	Pick List	1.Class 2.Mark	Number
<i>Field label</i>	<i>Data type</i>										
1.Phone Number	Phone										
1.School	Master Detail Relationship										
1.Results	Pick List										
1.Class 2.Mark	Number										

Parent object		
	Field label	Data type
	1.Parent Address	Text Area
	1.Parent Number	Phone

3.2 ACTIVITY & SCREENSHOT

The screenshot shows the Salesforce Setup interface for the 'school' object manager. The browser address bar indicates the URL: `governmentartscollegesale50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011...`. The page title is 'SETUP > OBJECT MANAGER school'. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' section shows the API Name as 'school__c', Custom as 'Custom', Singular Label as 'school', and Plural Label as 'schools'. The 'Enable Reports' section shows a checked box. The 'Track Activities' section shows a checked box. The 'Track Field History' section shows a checked box. The 'Deployment Status' section shows 'Deployed'. The 'Help Settings' section shows 'Standard salesforce.com Help Window'. The Windows taskbar at the bottom shows the time as 9:09 PM on 4/12/2023.

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce passw | Student | Salesforce

governmentartscollegesale50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01L...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

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

Search Layouts

List View Button Layout

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

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce passw | Parent | Salesforce

governmentartscollegesale50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01L...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Parent

Details Edit Delete

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Page Layouts

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List View Button Layout

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

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce passw | school | Salesforce

governmentartscollegesale50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01L...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
school

Details

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Student__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone Number	Phone_Number__c	Phone		

Type here to search

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce passw | Student | Salesforce

governmentartscollegesale50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01L...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Result__c	Picklist		
school	school__c	Master-Detail(school)		✓
student Name	Name	Text(80)		✓

Type here to search

9:12 PM 4/12/2023

Setup > OBJECT MANAGER

Parent

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
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

School Management

schools

Recently Viewed

0 items • Updated a few seconds ago

Search this list...

school Name

You haven't viewed any schools recently.
Try switching list views.

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce pa | Profiles | Salesforce | Profiles - Salesforce - Develo x

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/00e7setupid=EnhancedProfiles&appLayout=...

salesforce 23 Search... Switch to Lightning Experience HARIHARAN P Setup Help Content

Home Chatter Libraries Content Subscriptions schools Students Parents +

Quick Find / Search... Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started

Salesforce Mobile Quick Start

Home

Administer
Release Updates
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Permission Set Groups
User Management Settings

Profiles

All Profiles Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Del...	School Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-7 of 7 0 Selected << Previous Next >> Page 1 of 1

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce pa | Users | Salesforce | parents - Salesforce - Develo x

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/0057isUserEntityOverride=1&appLayout=s...

salesforce 23 Search... Switch to Lightning Experience HARIHARAN P Setup Help Content

Home Chatter Libraries Content Subscriptions schools Students Parents +

Quick Find / Search... Expand All | Collapse All

Lightning Experience Transition Assistant
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Salesforce Mobile Quick Start

Home

Administer
Release Updates
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Permission Set Groups

parents

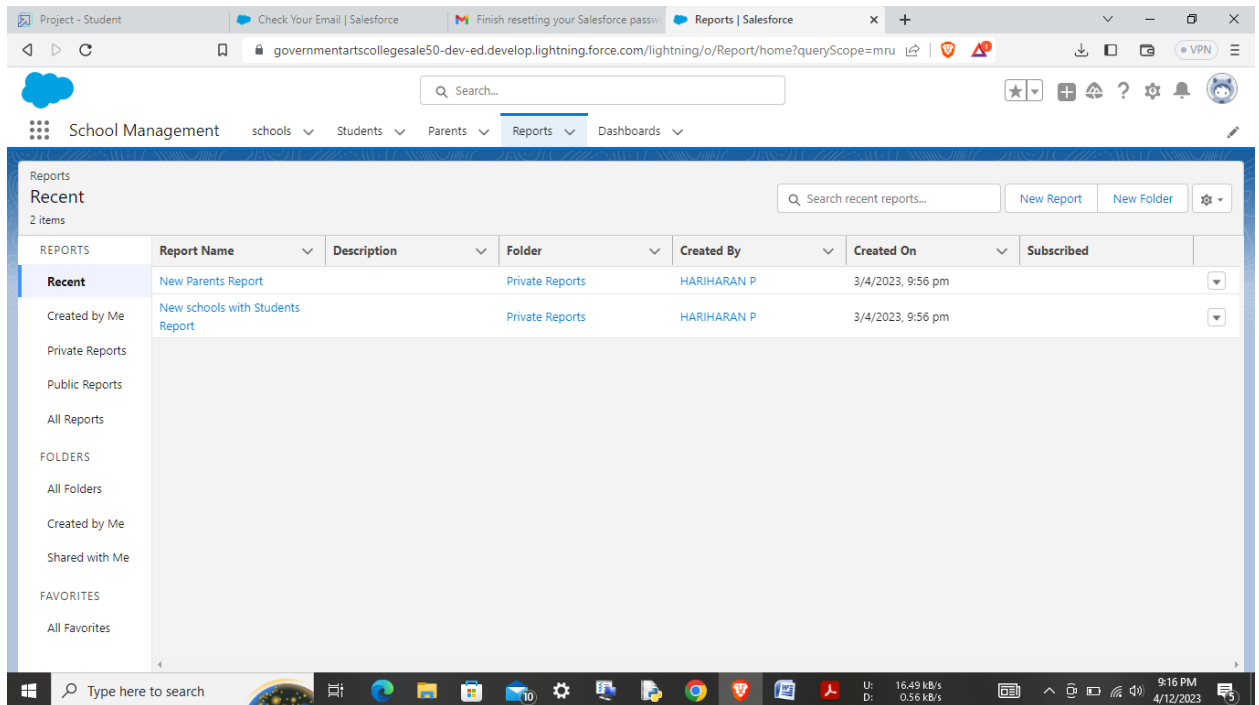
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: parents Edit | Create New View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Username	Alias	Active	Role	Profile
Edit	Chatter Expert	chatty.00d2v00000r0cd9eaj.1v2d1v8vnmv@chatter.salesforce.com	Chatter	<input checked="" type="checkbox"/>		Chatter Free User
Edit	haran hari	hariharano7503@gmail.com	hari	<input checked="" type="checkbox"/>		School Profile
Edit	P.HARIHARAN	hariharanhos6575@gmail.com	HP	<input checked="" type="checkbox"/>		System Administrator
Edit	User Integration	integration@00d2v00000r0cd9eaj.com	integ	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
Edit	User Security	insightssecurity@00d2v00000r0cd9eaj.com	sec	<input checked="" type="checkbox"/>		Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users



4 TRAILHEAD PROFILE PUBLIC URL

HARIHARAN P (Team lead) : <https://trailblazer.me/id/harip291>

SIVA M (Team member1) : <https://trailblazer.me/id/sivms>

AMIRTA GULGARNI K (Team member2): <https://trailblazer.me/id/agulgarni>

DHINESH KUMAR K (Team member3) : <https://trailblazer.me/id/kkumar2040>

5 ADVANTAGES & DISADVANTAGES

5.1 ADVANTAGES

- *Better communication: With a CRM application, schools and colleges can send targeted messages to students, parents, and staff members.*
- *This can help to ensure that everyone is aware of important dates, events, and deadlines.*
- *A CRM application can help schools and colleges to engage with students and parents in a more meaningful way.*
- *This can help to build stronger relationships and improve overall satisfaction with the institution.*

- *A CRM application can provide schools and colleges with valuable data about their students and other stakeholders.*
- *This data can be used to make more informed decisions about resource allocation, program development, and other strategic initiatives.*Top of Form

5.2 DISADVANTAGES

- *This can be a challenge for schools and colleges with limited IT resources.*
- *For a CRM application to be effective, it needs to be widely adopted by students, parents, and staff members.*
- *If there is resistance to using the application or if it is not user-friendly, it may not be effective.*
- *Collecting and storing personal information about students, parents, and staff members can raise privacy concerns. Schools and colleges need to ensure that they are complying with relevant data protection laws and taking appropriate measures to safeguard sensitive information.*

6 APPLICATION

- *School*
- *Institutions*
- *Colleges*
- *Acadamy*
- *Universities*

7 Conclusion

- *CRM application can help schools and colleges to improve communication, engagement, and efficiency, while also providing valuable data for decision-making.*
- *CRM application can offer many benefits, it is important for schools and colleges to carefully consider the potential disadvantages and to plan for a successful implementation that addresses these challenges.*

8 FUTURE SCOPE

The future of CRM (Customer Relationship Management) applications for schools and colleges is promising, as technology continues to advance and institutions look for more effective ways to manage interactions with students, parents, and staff members.

The CRM applications for schools and colleges is likely to be characterized by increased integration, automation, and personalization, as institutions look for ways to enhance relationships with their stakeholders and improve outcomes for students.

Thank you