

# A CRM APPLICATION FOR SCHOOLS/ COLLEGES

## 1. INTRODUCTION

### 1.1 Overview

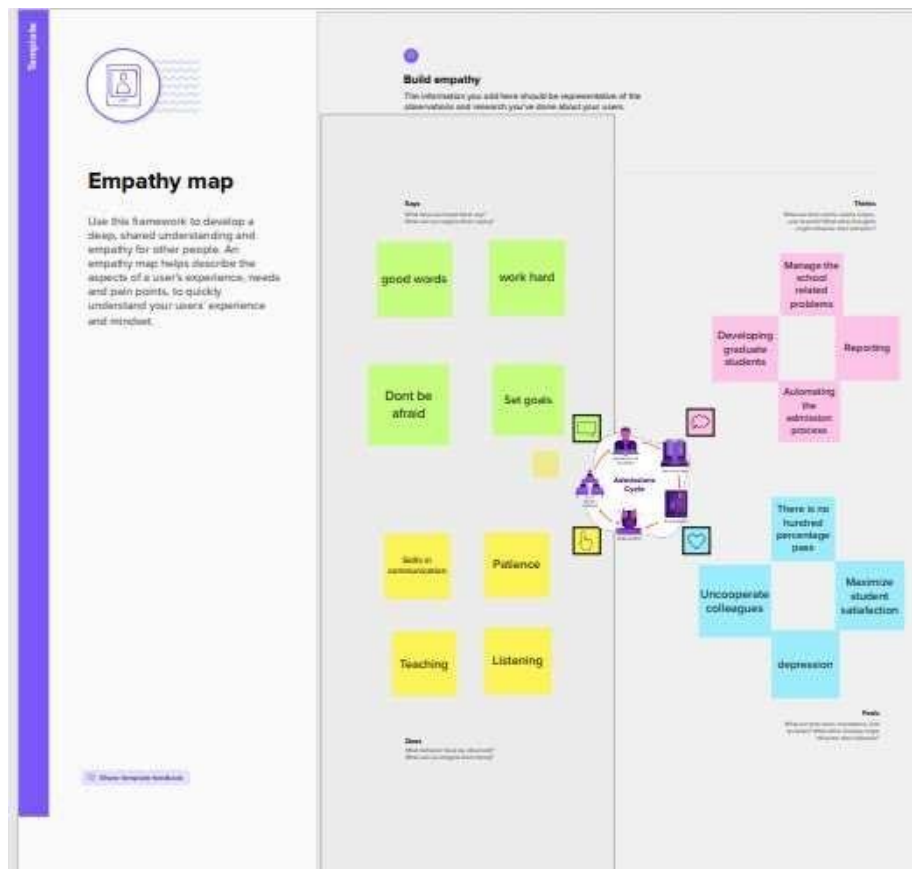
CRM stands for customer relationship management. It helps schools and education institutions automate admission processes and manage communication with students and parents.

### 1.2 Purpose

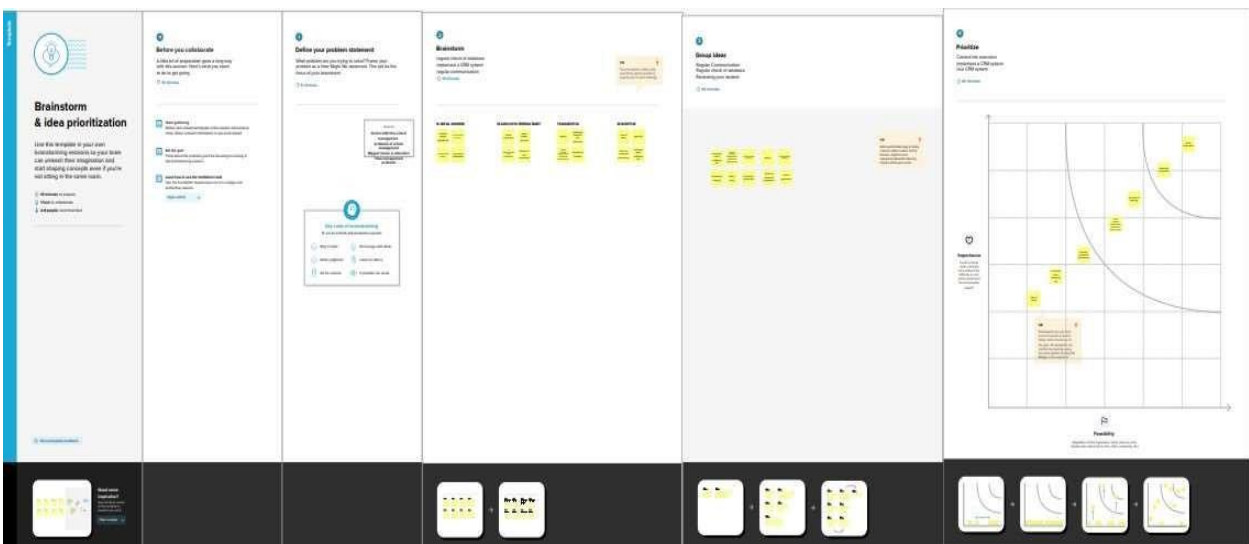
An education customer relationship management software (CRM) manages all your institution's interactions with prospective and current student. It also supports managing communications with alumni, employees, donors, and other members of the education sector in your institution.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



### 3. REPORT

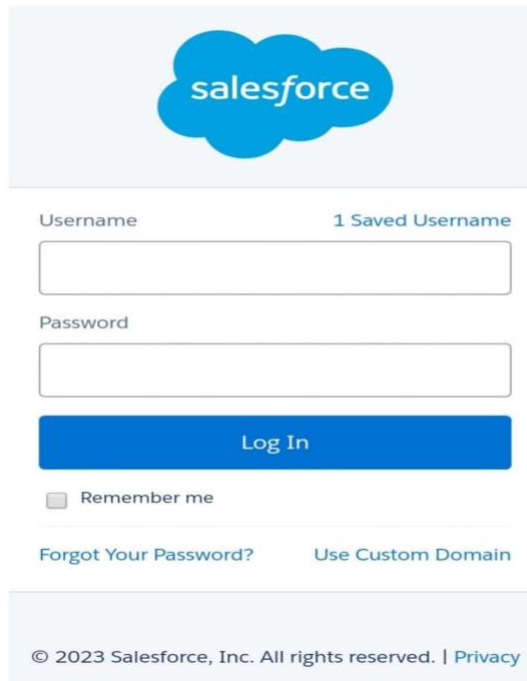
#### 3.1 Data Model

Object name	Fields in the object	
School	Field label	Data type
	Address	Text area
	district	
	State	
	School websites	
	Phone number	Phone
	Number of students	Roll-up summary
	Highest marks	
Student	Field label	Data type
	Phone number	Phone
	School	Master detail relationship
	Results	Picklist
	Class	Number

	Marks	
Parent	Field label	Data type
	Parent Address	Text area
	Parent number	Phone

## 3.2 Activity & Screenshot

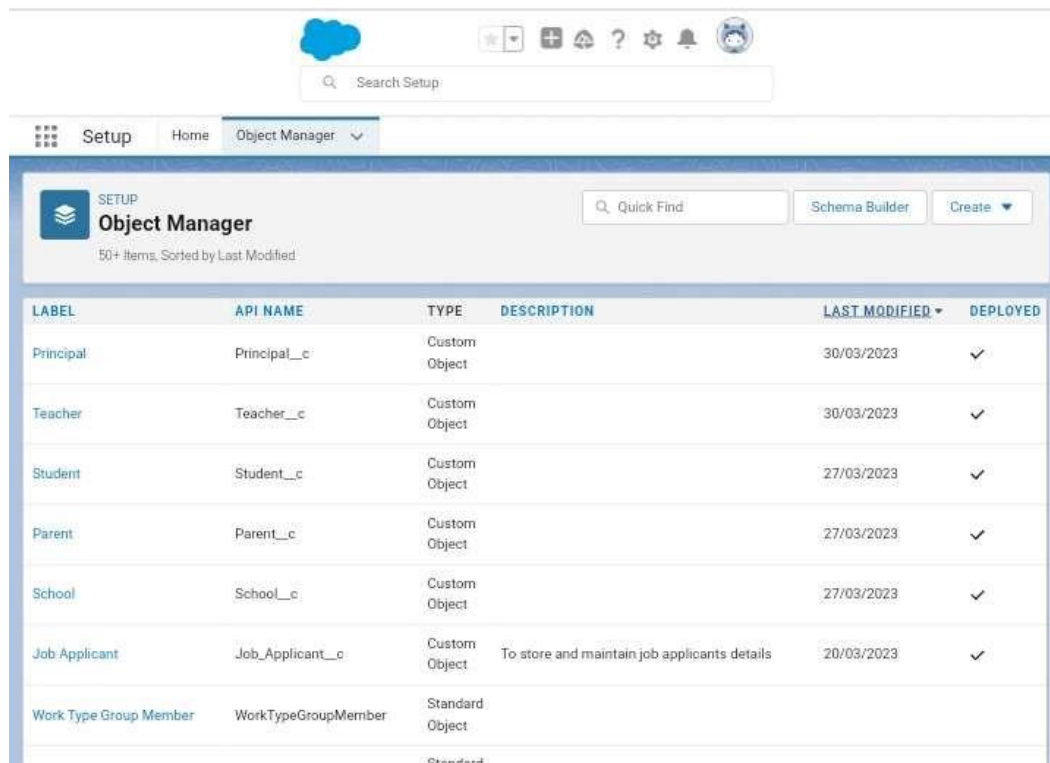
### 1. Creating an Salesforce account



The screenshot shows the Salesforce login interface. At the top is the Salesforce logo. Below it are input fields for 'Username' and 'Password'. The 'Username' field has a hint '1 Saved Username'. Below the password field is a blue 'Log In' button. Underneath the button is a 'Remember me' checkbox. At the bottom of the login section are links for 'Forgot Your Password?' and 'Use Custom Domain'. The footer contains the copyright notice '© 2023 Salesforce, Inc. All rights reserved.' and a 'Privacy' link.

Go to [salaesforce.com](https://salesforce.com) and click login. Enter the username and password that you just created.

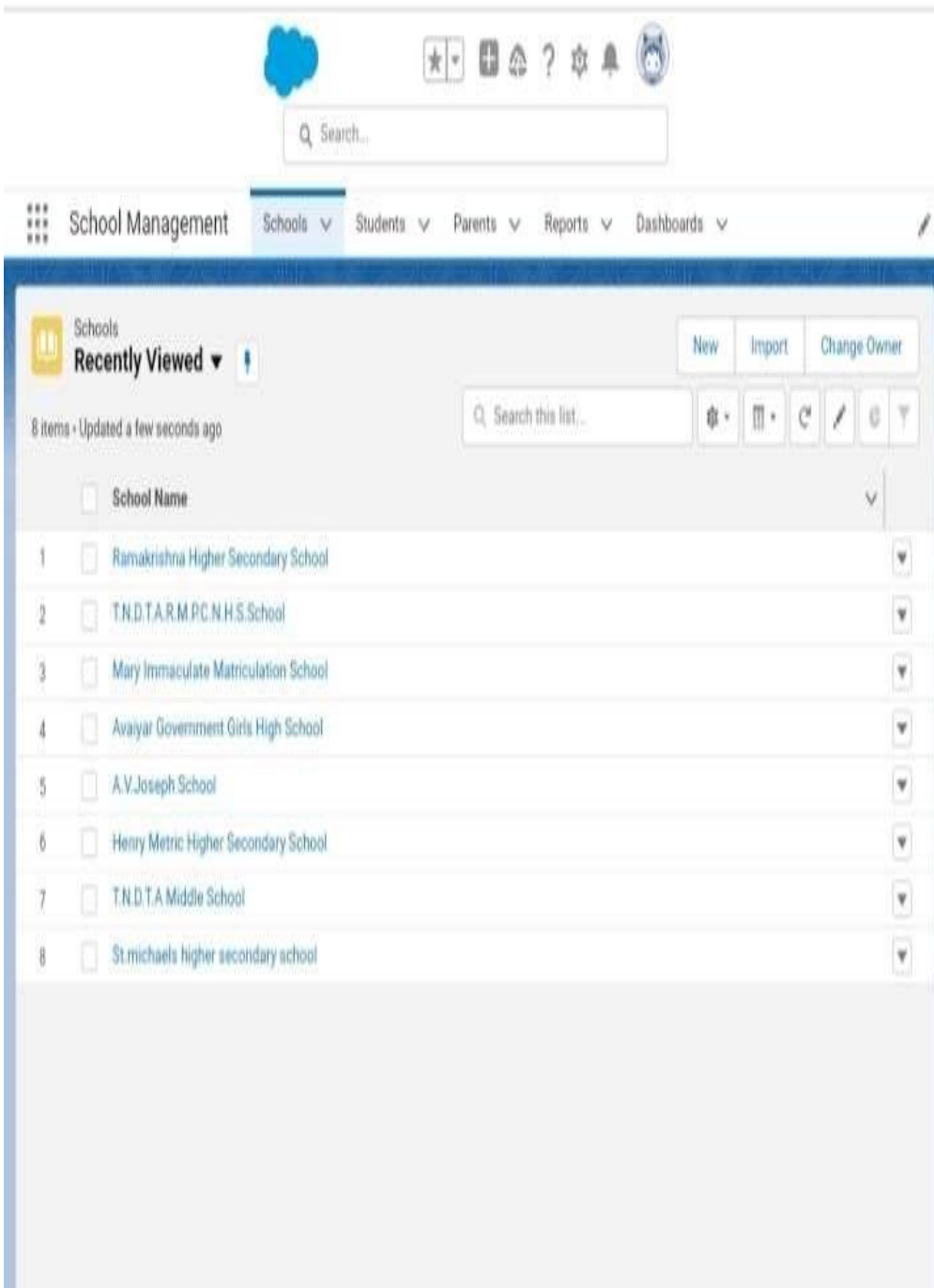
### 2. Object creation



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Principal	Principal__c	Custom Object		30/03/2023	✓
Teacher	Teacher__c	Custom Object		30/03/2023	✓
Student	Student__c	Custom Object		27/03/2023	✓
Parent	Parent__c	Custom Object		27/03/2023	✓
School	School__c	Custom Object		27/03/2023	✓
Job Applicant	Job_Applicant__c	Custom Object	To store and maintain job applicants details	20/03/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			

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

### 3. Lightning app creation



The simplest app usually has just two tabs.

## 4.Fields and relationship creation

Search Setup

SetupHomeObject 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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

FielQuick Find

11 Items, Over 19 Field Labels

NewDeleted FieldsField DependenciesSet 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_students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School websites	School_websites__c	Text Area(255)		
State	State__c	Text Area(255)		

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

Page Layouts

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

FielQuick Find

8 Items, Over 19 Field Labels

NewDeleted FieldsField DependenciesSet 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	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

Details

**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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

**Field** 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
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		

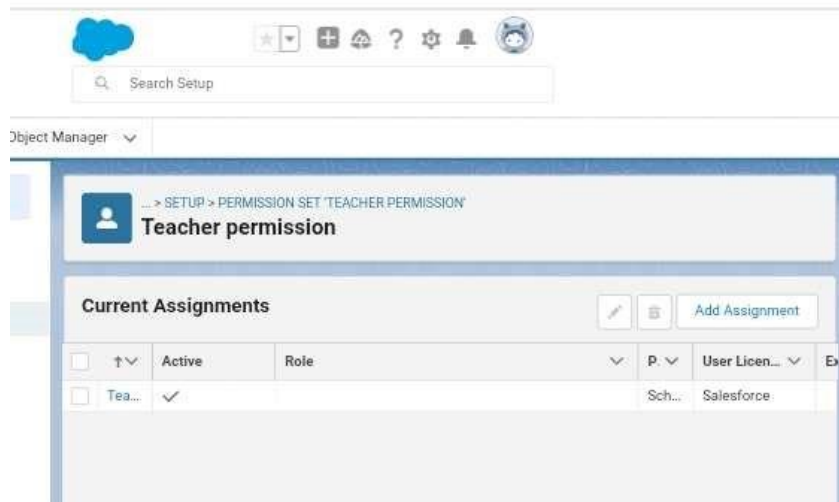
An object relationship in salesforce is a two way association between two objects

## 5. Profile creation





## 7. Permission sets creation



Permission sets extend user's functional access without changing their profile.

## 8. Reports creation

The screenshot shows the Salesforce Reports page. The report is titled 'New Schools with Students Report' and has 8 total records. The report is displayed in a table format with columns for School ID, School Name, District, School Owner Name, Student Name, and Results. The data is grouped by School ID, with subtotals for each group.

School: ID ↑	School: School Name	District	School: Owner Name	Student: Student Name	Results
<input type="checkbox"/> a012w00001CwGz (1)	St.michaels higher secondary school	Thoothukudi	Jeeva Jasmine Baskar Thangaraj	B.Jeeva Jasmine	*Pass
Subtotal					
<input type="checkbox"/> a012w00001CvW8 (2)	Ramakrishna Higher Secondary School	Thoothukudi	Jeeva Jasmine Baskar Thangaraj	U.Jeyanthi	*Pass
	Ramakrishna Higher Secondary School	Thoothukudi	Jeeva Jasmine Baskar Thangaraj	T.Nithya	*Pass
Subtotal					
<input type="checkbox"/> a012w00001CvW6 (1)	Mary Immaculate Matriculation School	Thoothukudi	Jeeva Jasmine Baskar Thangaraj	D. Sumathi	*Pass
Subtotal					
<input type="checkbox"/> a012w00001CvWc (1)	Avaiyar Government Girls High School	Tirunelveli	Jeeva Jasmine Baskar Thangaraj	V. Divya	*Pass
Subtotal					
<input type="checkbox"/> a012w00001Cw00 (1)	A.V.Joseph School	Tirunelveli	Jeeva Jasmine Baskar Thangaraj	S. Jenifer	*Pass
Subtotal					
<input type="checkbox"/> a012w00001Cw4b (2)	T.N.D.T.A.R.M.P.C.N.H.S.School	Thoothukudi	Jeeva Jasmine Baskar Thangaraj	J. Kavitha	*Pass
	T.N.D.T.A.R.M.P.C.N.H.S.School	Thoothukudi	Jeeva Jasmine Baskar Thangaraj	R.Mercy	*Pass
Subtotal					
Total (8)					

The screenshot shows the 'School Management' application interface. At the top, there is a navigation bar with tabs for 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The 'Reports' tab is selected, and a sub-tab 'New Parents Report' is active. Below the navigation bar, there is a search bar and a 'Total Records' section showing '8'. The main content area displays a table with columns: 'Parent: ID', 'Parent: Parent Name', 'Parent Number', 'Parent: Owner Name', 'Parent: Owner Alias', and 'Parent: Last Modified Date'. The table lists 8 parents, each with a 'Subtotal' row below it. The 'Total (8)' row is at the bottom of the table.

Parent: ID	Parent: Parent Name	Parent Number	Parent: Owner Name	Parent: Owner Alias	Parent: Last Modified Date
a032w00000V9kwM (1)	B. Hepshi	4657832410	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
a032w00000V9ICc (1)	R. Malai	3857839570	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
a032w00000V9ICd (1)	T. Rani	3456783547	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
a032w00000V9ICe (1)	P. Selvam	2345678194	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
a032w00000V9ICf (1)	H. Shanthy	5673845691	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
a032w00000V9ICg (1)	S. Kiruba	3456724891	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
a032w00000V9ICh (1)	Y. Esther	5671324876	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
a032w00000V9ICi (1)	D. Jothi	3456712845	Jeeva Jasmine Baskar Thangaraj	JBask	05/04/2023
Subtotal					
Total (8)					

Every report is stored in a folder.

## 4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/jjasmine6>

Team Member 1- <https://trailblazer.me/id/merim10>

Team Member 2- <https://trailblazer.me/id/sangee31>

Team Member 3- <https://trailblazer.me/id/smurugesan54>

## 5. Advantages & Disadvantages

### ADVANTAGES:

- Third party integrations
- MIS reports
- Managing Alumni Connections
- Admission process
- Managing school events
- Collecting student feedback

### DISADVANTAGES:

- Record loss
- Overhead
- Technical support
- Security issues
- Staff Resistance

## 6. APPLICATIONS

- Student management
- Dashboard
- Finance management
- Human resource

## 7. CONCLUSION

A school app can help you track student progress for instance, and manage attendance and fee payments, store and retrieve academic documents, etc. It is the best platform to make quick interactions with teachers, students and parents . A school ERP software promotes a healthy learning atmosphere.

## 8. FUTURE SCOPE

### **1. GLOBAL LEARNING**

The use of various software for school management will allow students to interact with learning communities from across the world. Students across the world with similar learning styles and similar interests can connect with the help of the app , thus creating a diverse and interactive learning culture.

### **2. EFFICIENT SCHOOL ADMINISTRATION**

The advanced school ERP will make school administration in the future easier than it has ever been. Schools will no longer have to struggle with heaps of paper records, as they will be able to maintain all records of the institution in a digital format

thus making its access and management really easy.

### **3. STREAMLINED PROCESSES**

The use of software for school management will ensure that schools in the future have streamlined processes in the apps will built -in features that allow for operational effectiveness , automatic upgrades and uniform compliance.