

PROJECT REPORT

A CRM Application for Schools/Colleges

• INTRODUCTION

• Overview

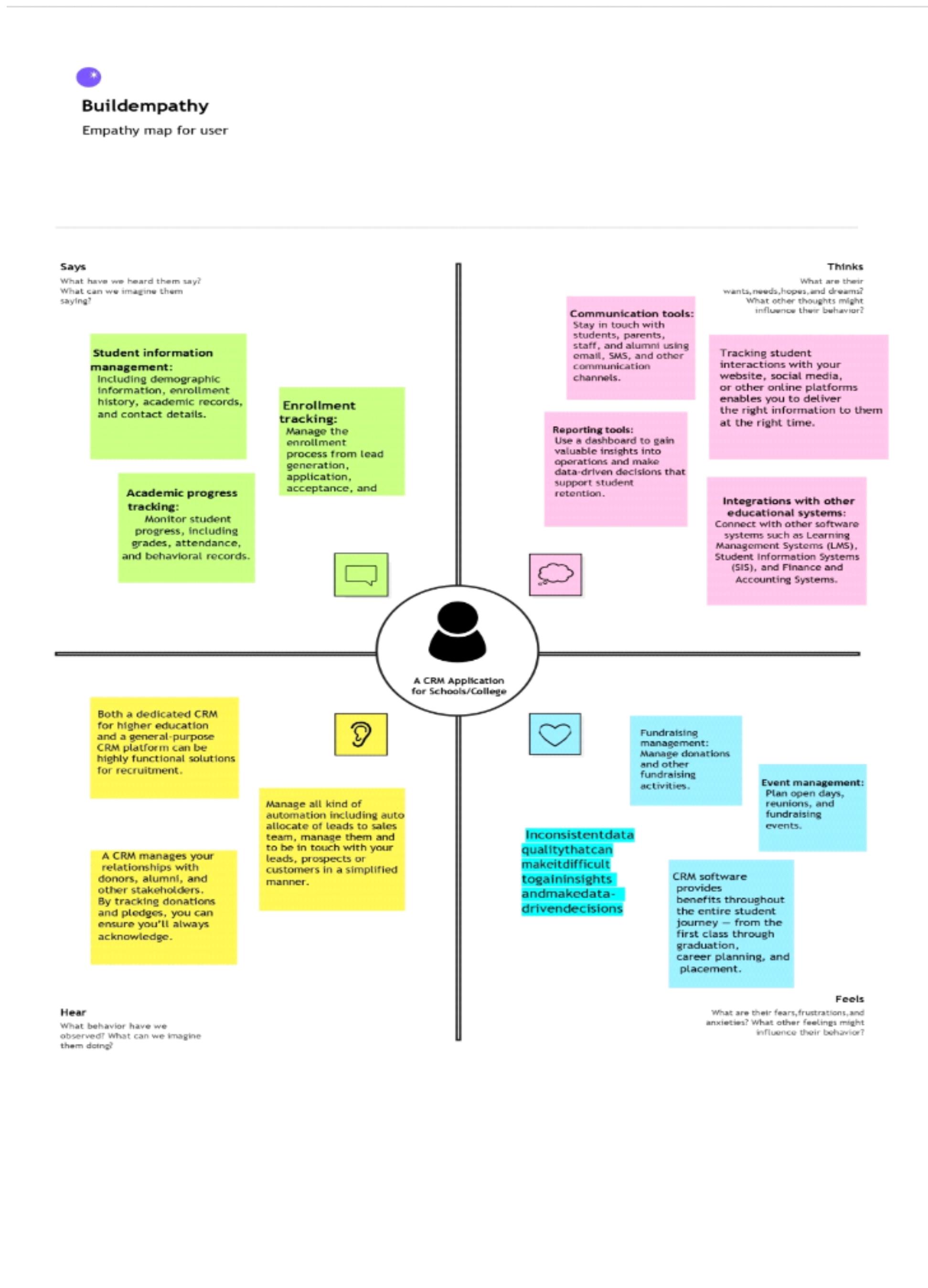
- It provides a centralised platform for collecting, organising, and analysing data related to these relationships, with the goal of improving student outcomes, increasing efficiency, and enhancing communication.
- It is a software solution designed to help educational institutions manage their relationships with students, parents, alumni, faculty, staff, and other stakeholders.

• Purpose

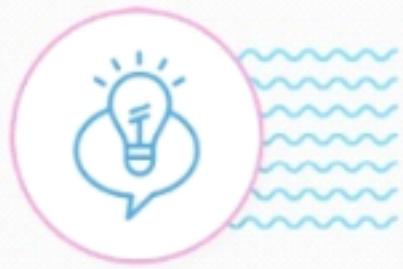
- Store information
- Identify sales opportunities
- Record service issues
- Manage marketing campaigns
- Improve the customer experience

• PROBLEM DEFINITION & DESIGN THINKING

• Empathy Map



• Ideation & Brainstorming Map



Brainstorm & idea prioritization

Use this template in your own sessions so your team can unleash

⌚ 10 minutes to prepare
📅 1 hour to collaborate
👤 2-5 people recommended

Date	22.03.2023
Team ID and Members	ID:NM2023TMID21106 Leader:S.Logesh Members: S.Praveen K.Praveenkumar S.Kanagaraj
Project	A CRM Application for Schools/college

📝 Share template feedback



Before you collaborate

A little bit of preparation goes along way with this session. Here's what you need to do to get going.

⌚ 10minutes



Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.



Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.



Learn how to use the facilitation tools

Use the Facilitation Super powers to run a happy and productive session.

Open article



Groupideas

A CRM Application for schools/college
 Group ideas are shortly presented
 20minutes



Student admission:

InWith Advanced Lead/ Enquiry Management and the complete communication history of the lead along with automated lead nurturing, it is very easy to get a student admitted using the best CRM for Educational Institutions. Solid performers CRM software is designed by taking care of all the requirements that are required to manage a successful educational institute admission along with automation in this CRM for Educational Institutions & Traning Institutes.

Improved donor engagement : A CRM manages your relationships with donors, alumni, and other stakeholders. By tracking donations and pledges, you can ensure you'll always acknowledge and promptly thank your donors. Managing donor information also allows you to track fundraising goals and progress so you can produce reports that will help you secure more funding.

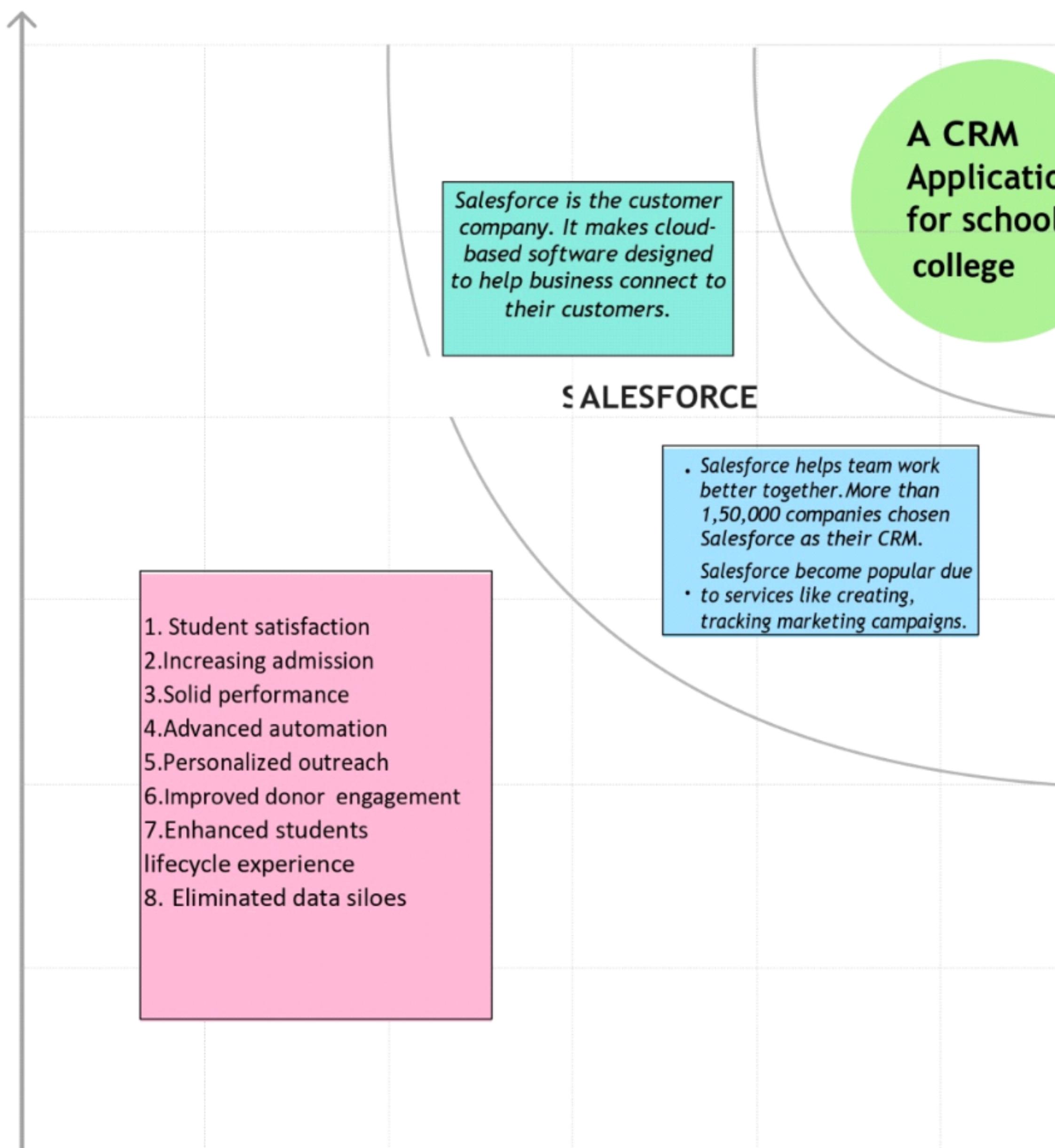
Greater understanding : Rather than focusing on individual pain points, your CRM will import data from multiple integrated systems to improve your understanding of your entire operations. Instead of faculties working separately, CRMs ensure that data from respective departments is collated

4

Prioritize

A CRM Application for schools/college Project our team make an presentation for priorities in the project

⌚ 20minutes



- **RESULT**

- **Data Model**

Object name

Fields in the Object

Field Label	Data Type
Address	Text Area
District	Text Area
State	Text Area
School	Text Area
Phone Number	Phone
Number of Student	Roll-up Summary
Highest Mark	Roll-up Summary

School

Field Label	Data Type
Phone Number	Phone
School	Master-Detail Relationship

Student

Field Label	Data Type
Parents Address	Text Area
Parents Number	Phone

Parents

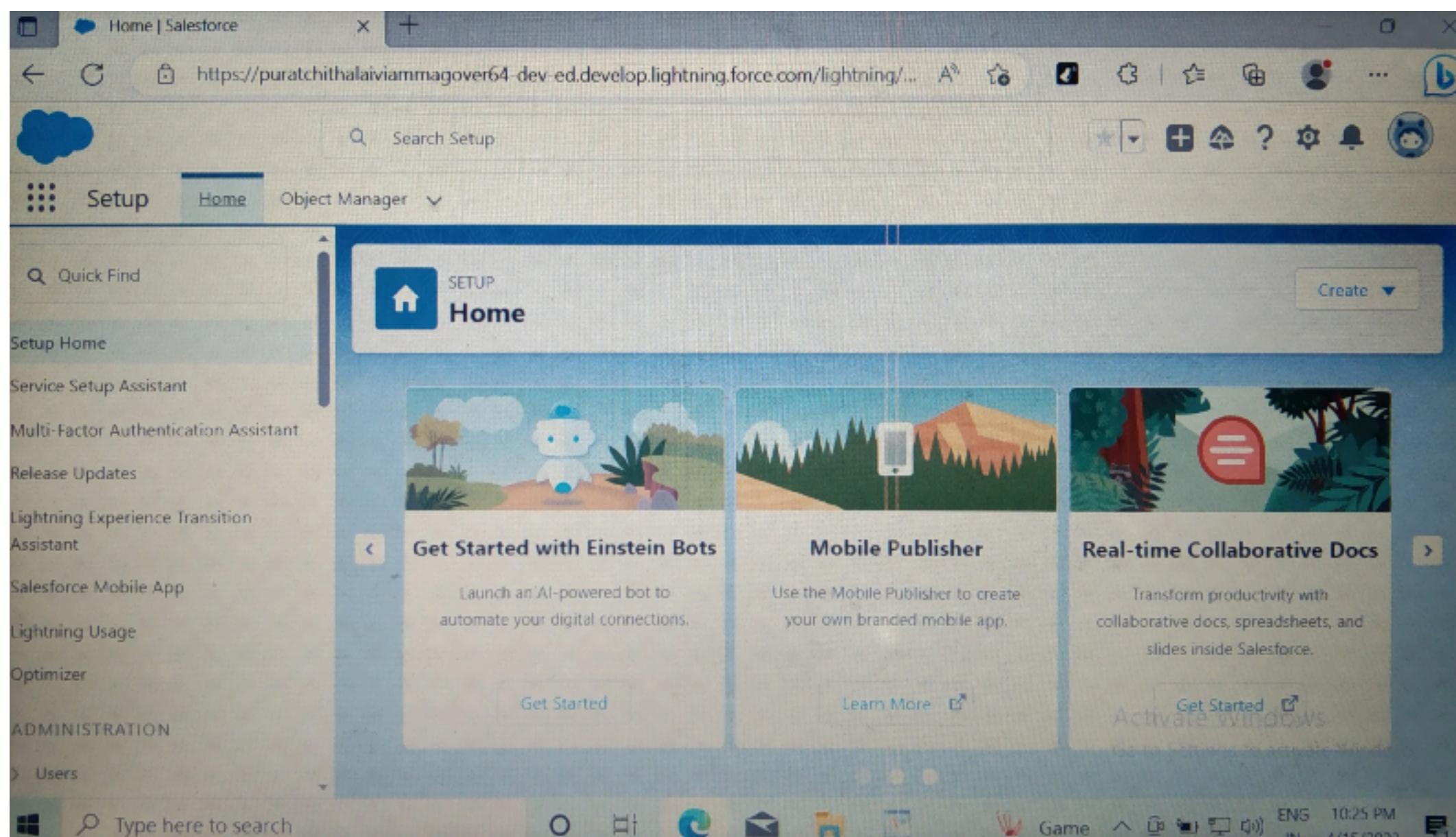
- **Activity & Screenshot**

Project:

A CRM Application For Schools/Colleges

Activities:

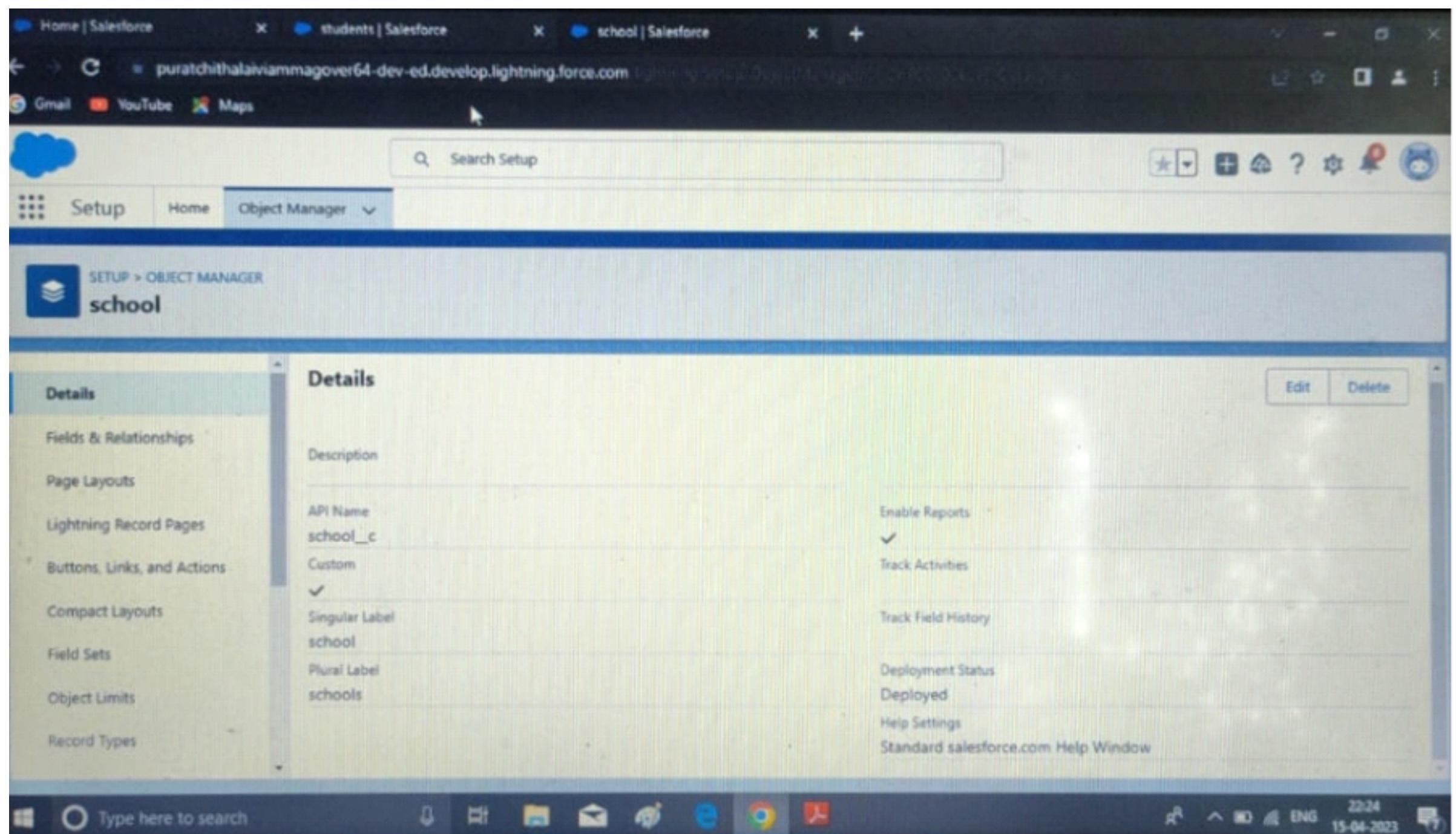
Milestone 1 : *Creating Developer Account*



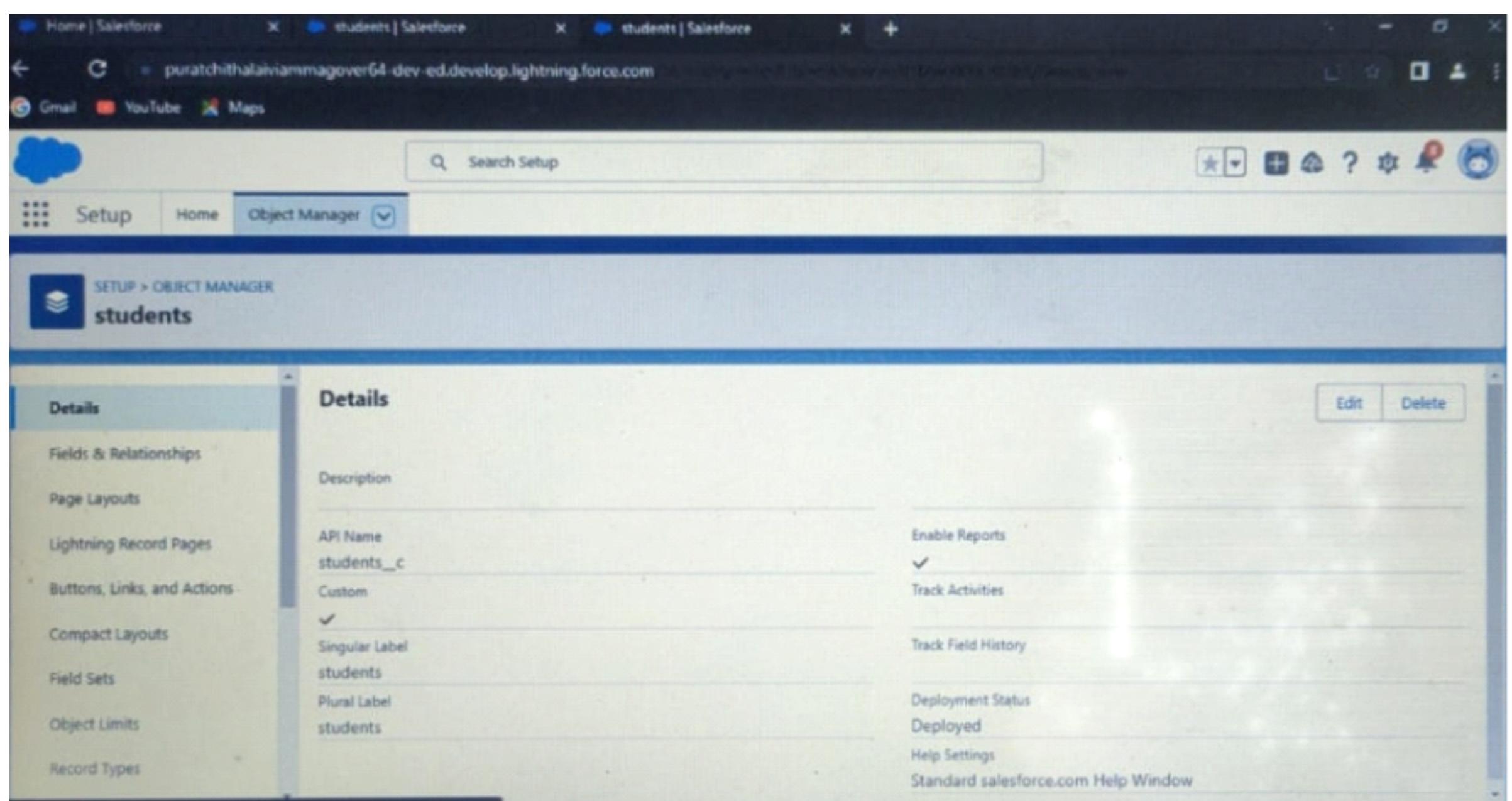
Salesforce is your customer success platform, designed to help you sell, service, market, analyse, and connect with your customers.

Milestone 2 : Object

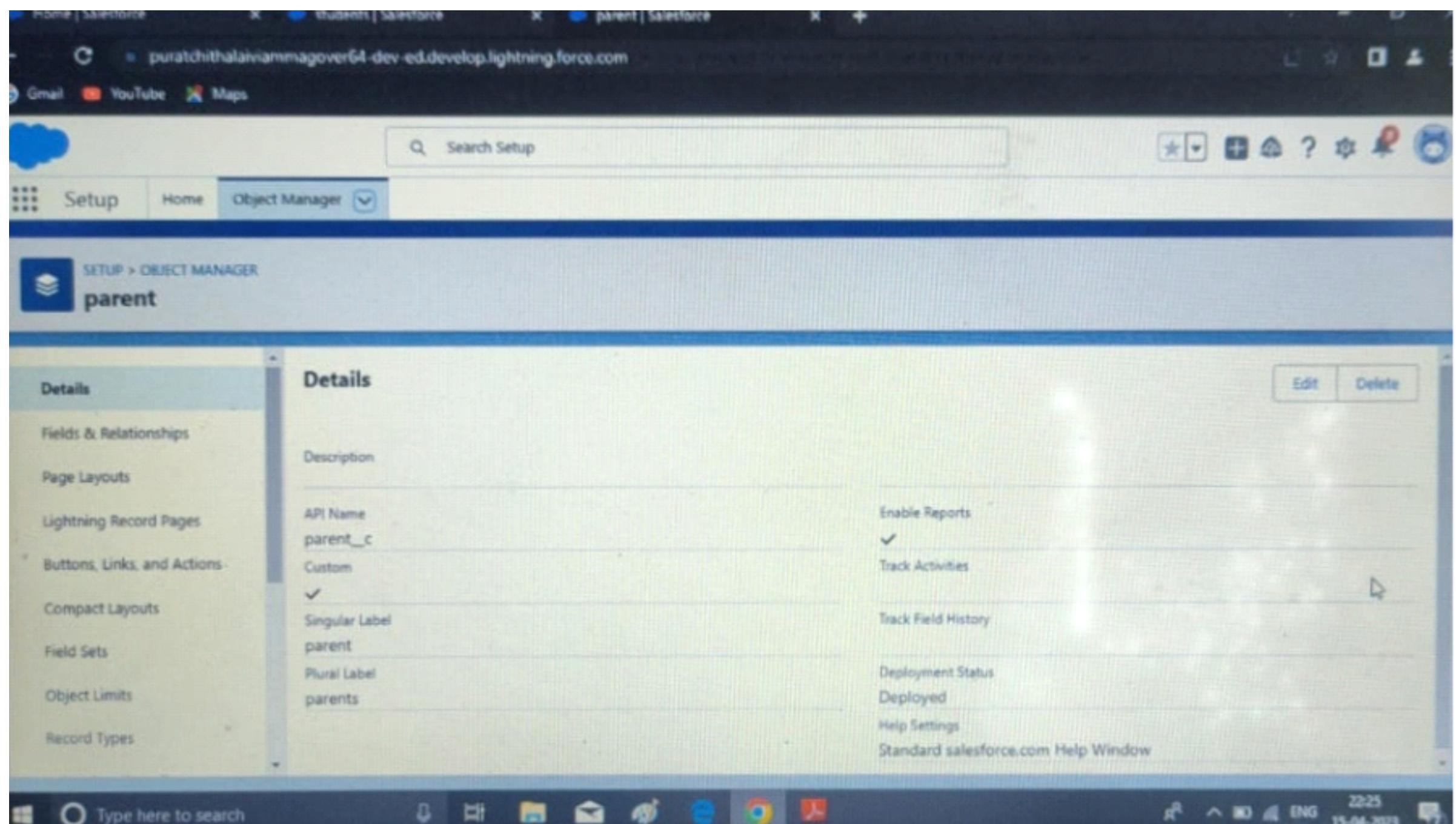
Salesforce objects are database tables that permit you to store data that is specific to an organization.



Activity 1: Creation of School Object



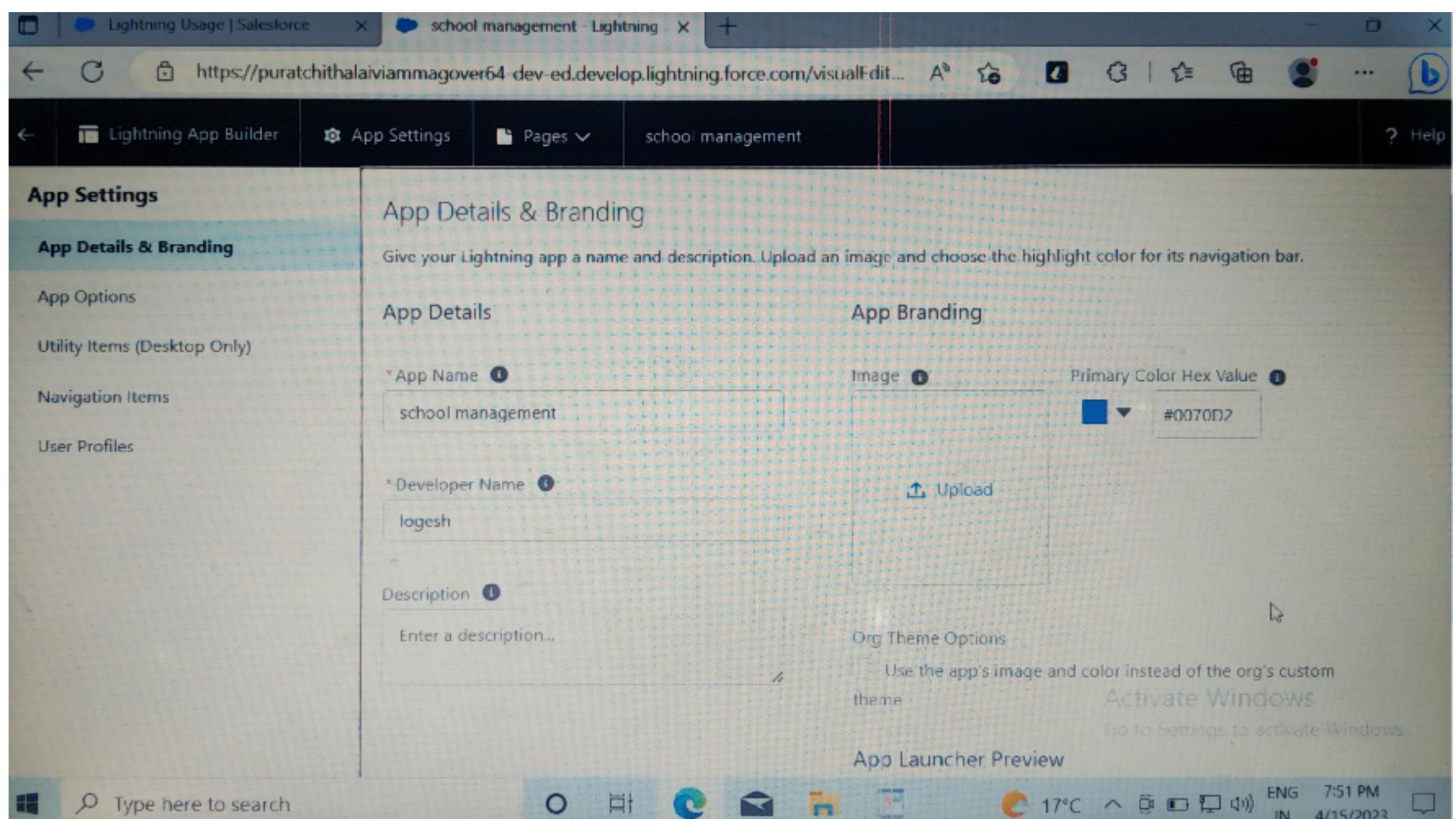
Activity 2 : Creation of Student Object



Activity 3 : Creation of Parent Object

Milestone 3 :Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit.



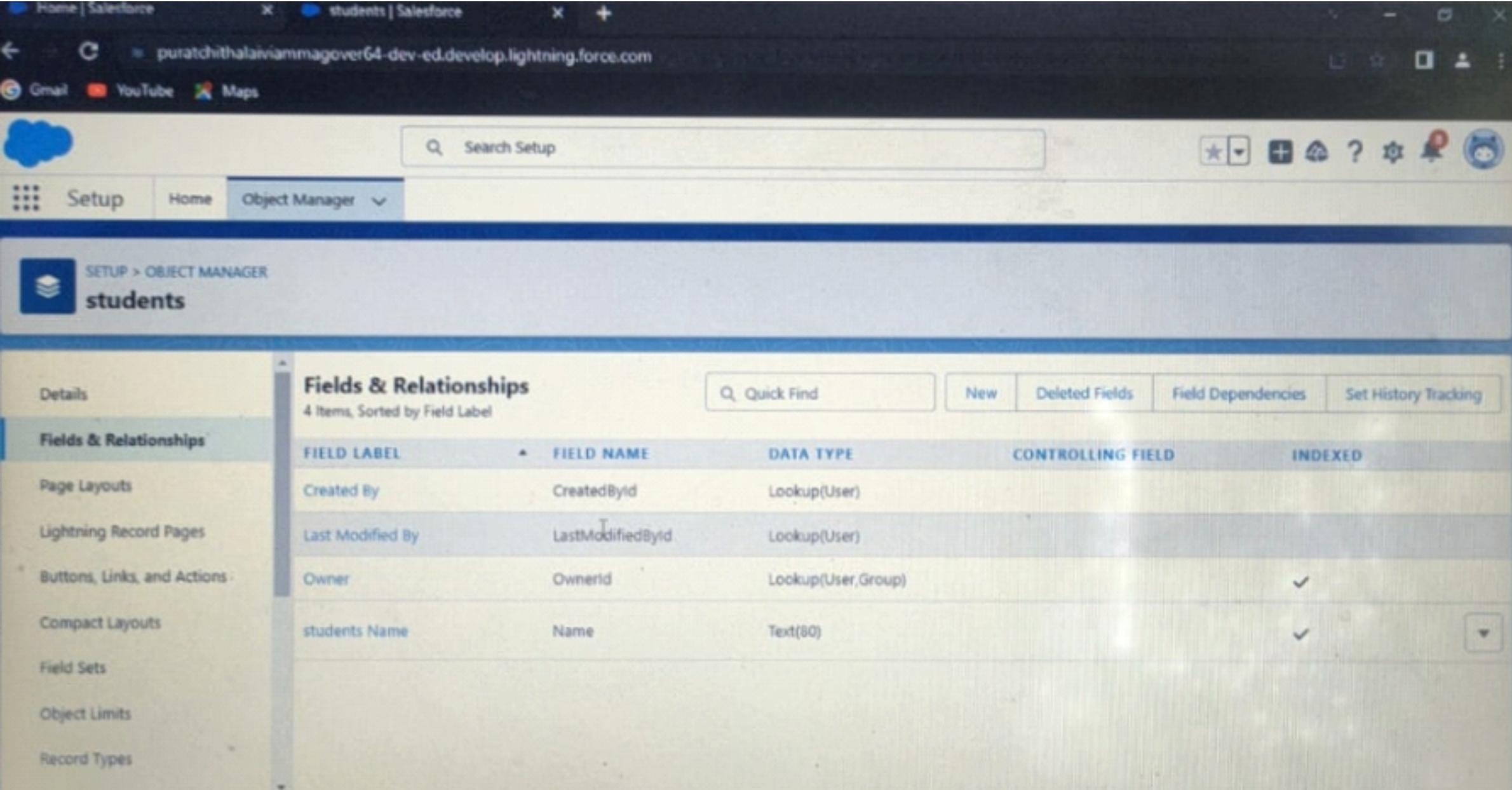
Milestone 4 :Fields and Relationship

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

This is done so that when users view records, they can also see and access related data.

A screenshot of the Salesforce Object Manager. The top navigation bar shows tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is active and displays the 'school' object. On the left, there's a sidebar with links for 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'. The main content area is titled 'Fields & Relationships' and shows a table with 17 items. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The table includes rows for 'address' (Text Area(255)), 'class' (Number(18, 0)), 'Created By' (Lookup(User)), 'district' (Text Area(255)), 'highest marks' (Checkbox), and 'Last Modified By' (Lookup(User)).

Activity 1 : Creation of Field for the School objects



The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Fields & Relationships' option is selected. The main area displays a table titled 'Fields & Relationships' with 4 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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)		✓
Students Name	Name	Text(80)		✓

Activity 2 : Creation of Field for the Student objects

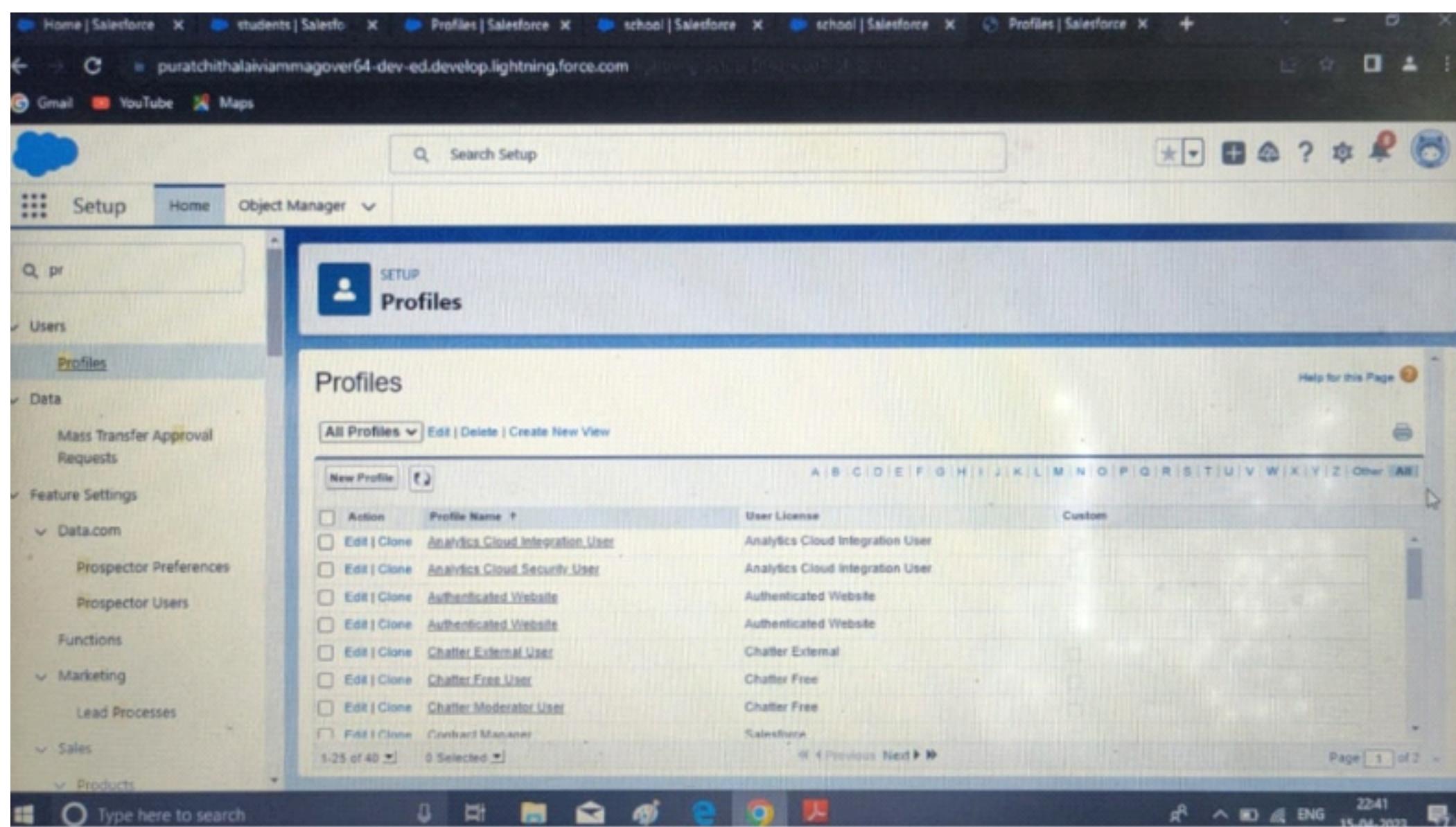
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Home, students, Profiles, school, and parent. The main title is "parent". The left sidebar lists "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", and "Record Types". The central area displays the "Fields & Relationships" section with the following data:

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 Name	Name	Text(50)		✓

Activity 3 : Creation of Field for the Parent objects

Milestone 5 :Profile

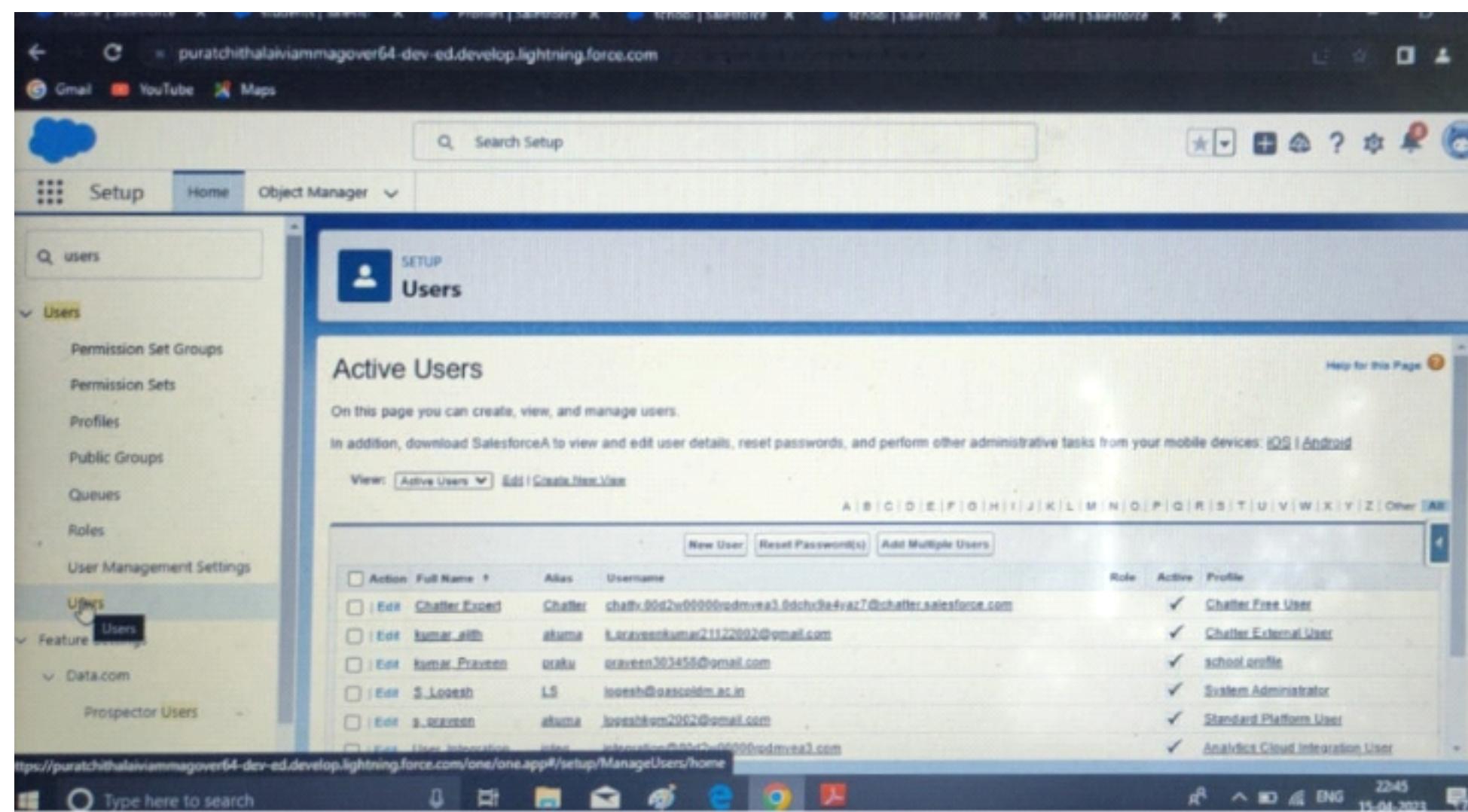
A profile is a group/collection of settings and permissions that define what a user can do in salesforce.



Activity : Creation on Profile

Milestone 6 :Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.



Activity : Creating a users

Milestone 7 :permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions.

Activity 1 : Permission Sets 1

The screenshot shows the 'Permission Set' page for 'principal permission'. At the top, there's a search bar, a 'Clone' button, and 'Edit Properties' and 'Manage Assignments' buttons. Below that is the 'Permission Set Overview' section with fields for Description (empty), API Name (principal_permission), License (empty), Namespace Prefix (empty), Session Activation Required (unchecked), Created By (Logesh S.), and Last Modified By (Logesh S.).

The main content is divided into sections: 'Apps' and 'System'. The 'Apps' section contains a list of permissions with descriptions:

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.
- External Data Source Access**: Permissions to authenticate against external data sources.
- Flow Access**: Permissions to execute Flows.
- Named Credential Access**: Permissions to authenticate against named credentials.
- Custom Permissions**: Permissions to access custom processes and apps.
- Custom Metadata Types**: Permissions to access custom metadata types.
- Custom Setting Definitions**: Permissions to access custom settings.

The 'System' section contains a list of permissions with descriptions:

- System Permissions**: Permissions to perform actions that apply across apps, such as "Modify All Data".
- Service Providers**: Permissions that let users switch to other websites using single sign-on.

Activity 2 : Permission Sets 2

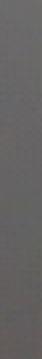
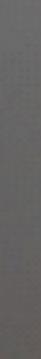
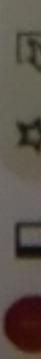
Milestone 8 :Reports

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

puratchithalaivammagoverf4-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mn

WhatsApp

mail



Activate Windows

Activity : Report

- TRAILHEAD PROFILE PUBLIC URL**

Team Lead - <https://trailblazer.me/id/Is20uma016>

Team Member 1 - <https://trailblazer.me/id/kana42>

Team Member 2 - <https://trailblazer.me/id/pravs70>

Team Member 3- <https://trailblazer.me/id/pravk46>

- ADVANTAGES & DISADVANTAGE**

- Advantages**

- It allows for more effective sales and marketing.
- It can speed up the sales conversion process..
- It increases staff productivity, lowers time costs and boost morale.
- It enables widely dispersed teams to work closely.

- Can improve customer loyalty through exceptional experience.

- **Disadvantage**

- **Staff over-reliance on CRM may diminish customer loyalty through a bad experience.**
- Security concerns associated with centralized data.
- The excess initial time and productivity cost of implementation.
- It requires a process-driven sales organisation.
- It may not suit every business.

- **APPLICATIONS**

A CRM system can streamline the admissions process by capturing student data, automating the application process, and tracking the status of applications.

- A CRM system can provide a platform for communication between faculty, staff, students, and parents/guardians. It can facilitate communication through emails, messages, and notifications.
- A CRM system can help track student requests and inquiries related to student services such as counselling, academic advising, and career services.

- **CONCLUSION**

- A CRM application for schools and colleges can provide many benefits, including improved communication, streamlined administrative processes, better data management, and improved customer service.
 - Schools and colleges must be aware of the potential drawbacks, such as cost and privacy concerns, and take steps to mitigate these risks.
 - By using a CRM application, schools and colleges can improve their relationships with students, staff, and parents, leading to better academic outcomes and a more engaged school community.
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- **FUTURE SCOPE**
 - As the education industry continues to evolve and become more competitive, institutions will increasingly look for ways to differentiate themselves by providing exceptional customer service and engagement.
 - The future scope of a CRM application is in data analytics.
 - As schools and colleges collect more data on

students, staff, and parents, they will need tools to analyse and make sense of this data.

- As educational institutions become more complex, it is becoming increasingly important for stakeholders to communicate and collaborate effectively.