A CRM APPLICATION FOR SCHOOL/COLLEGES

1. INTRODUCTION :

1.1 OVERVIEW :

Customer Relationship Management or CRM Software enables educational institutions such as school colleges to manage relationships with students, parents, staff, alumni and other stakeholders. It handles all aspects of the entire student lifecycle, from enrollment   and academic progress tracking to fundraising management and reporting tolls.

1.2 PURPOSE :

By use of this project, it enhances students life cycle experience and to improve understanding of difficult points.

2 PROBLEM DEFINITION & DESIGN THINKING :

2.1 EMPATHY MAP :

Says
What have we heard them say?
What can we imagine them saying?

User-friendly dashboard.

Counselling and interviewed management.

Online evaluation and assessment.

Tools for an automated online admission process.

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

ID and password for each individual to check their personal information.

Additional information about Hostel.

Need of e-books for every subject.

Keep track of students like attendance alerts.

CRM APPLICATION FOR SCHOOLS/ COLLEGES

Customizable software that provides end-to-end functionality.

Available of bilingual languages.

Send individual emails or scheduled automated emails.

Accessible from any devices (phones and computer).

Solid security features for datas.

Lack of server to view results.

Issues for uploading files.

Reporting capabilities are limited.

Does
What behavior have we observed?
What can we imagine them doing?

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?
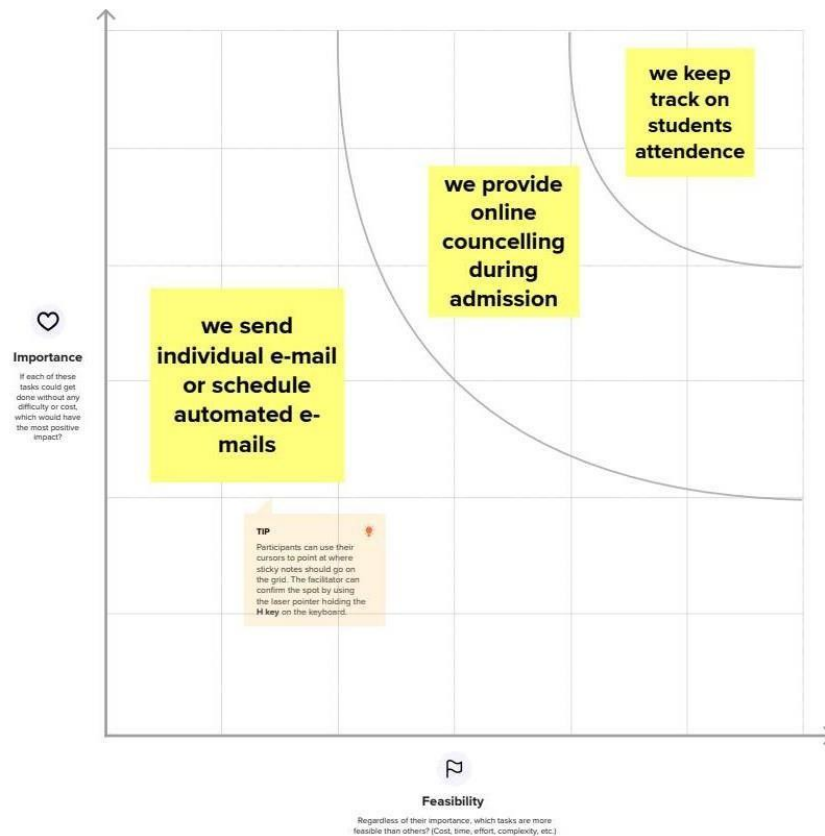
2.2 IDEATION AND BRAINSTROMING MAP :

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕐 **20 minutes**

♡

Importance

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

we send individual e-mail or schedule automated e-mails

we provide online councelling during admission

we keep track on students attendence

TIP

Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the **H key** on the keyboard.

⚑

Feasibility

Regardless of their importance, which tasks are more feasible than others? (Cost, time, effort, complexity, etc.)

After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

A **Share the mural**
Share a **view link** to the mural with stakeholders to keep them in the loop about the outcomes of the session.

B **Export the mural**
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

Keep moving forward

Strategy blueprint
Define the components of a new idea or strategy.
Open the template →

Customer experience journey map
Understand customer needs, motivations, and obstacles for an experience.
Open the template →

Strengths, weaknesses, opportunities & threats
Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.
Open the template →

🗐 Share template feedback

Person 1

we make user friendly dashboard

we will add additional information about hostel

Person 2

we provide solid security for data

we send individuals e-mail or schedule automated e-mails

Person 3

we keep track on students attendence

we provide online councelling during admission

Person 4

we resolve the issues for uploading files

we provide notification for every events

3. RESULT :

3.1 DATA MODEL :

OBJECT NAME	FIELDS IN THE OBJECT	
	FIELD LABEL	DATA TYPE
SCHOOL	Address	Text area
	District	Text area
	State	Text area
	School	Text area
	Phone number	Phone
	Number of students	Roll up summary
	Highest Marks	Roll up summary
STUDENTS	Phone number	Phone
	School	Master detail relationship
	Results	Pick list
	Class	Number
	Marks	Number
PARENTS	Parent address	Text area
	Parent number	Phone

3.2 ACTIVITY AND SCREENSHOT :

MILESTONES 1: Creating an Account

ACTIVITY: Creating Developer Account

From this go to http://developers.salesforce.com/signup and enter all the given details and then your account will be activated .
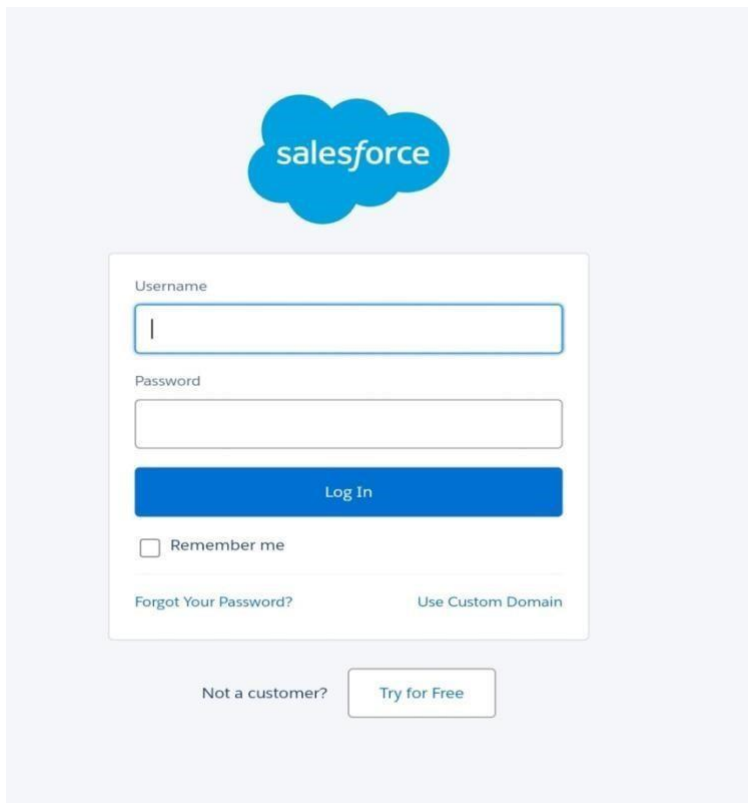
Next go to http://salesforce.com/login and then enter the user name and password .
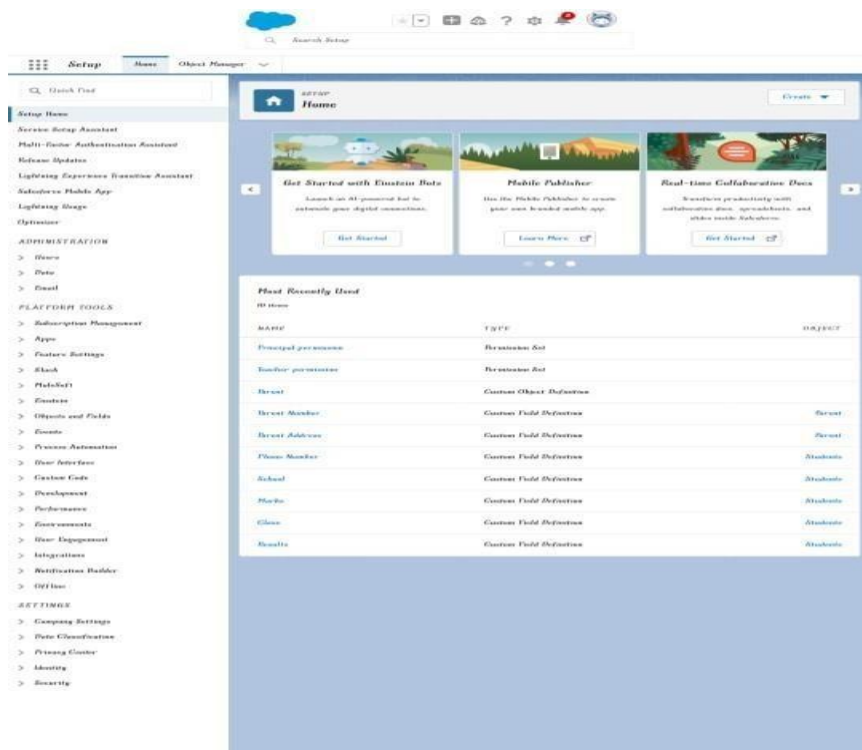
The home page will be displayed like this .

MILESTONES 2: OBJECT :

    ACTIVITY: Creation of object

From this page select the object manager and then select the custom object and enter all given details to create school object .
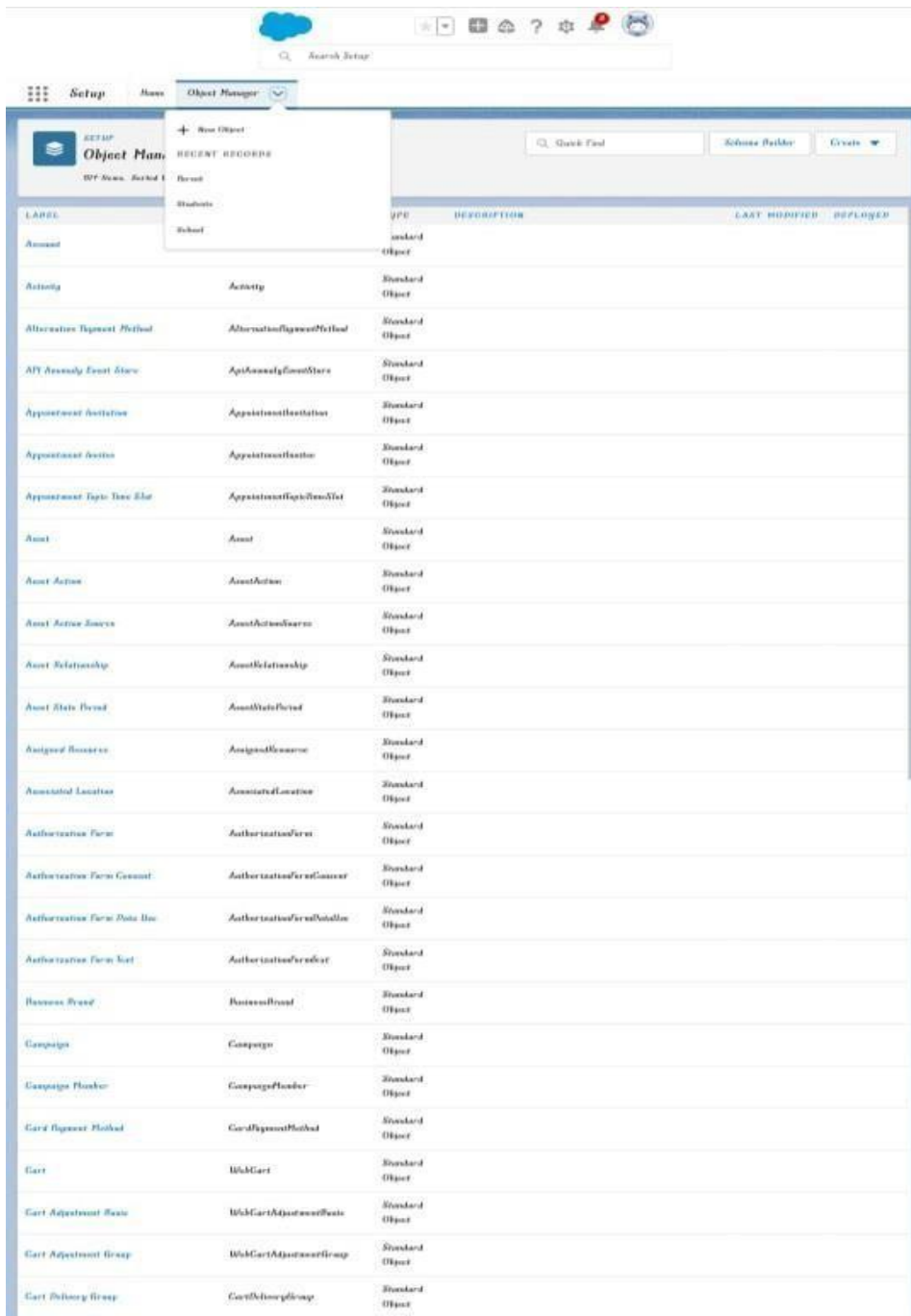
Follow the same procedure to create student and parent object.

MILESTONE 3: LIGHTNING APP :

ACTIVITY: Create the School Management App

From this select the app manager in quick find and click new lightning app and enter the app name as School, Students, Parents, Reports and Dashboard and click save and finish .

Then the school management app will be displayed like this .

MILESTONE 4: FIELDS AND RELATIONSHIP :

ACTIVITY 1: Creation of fields for the school object
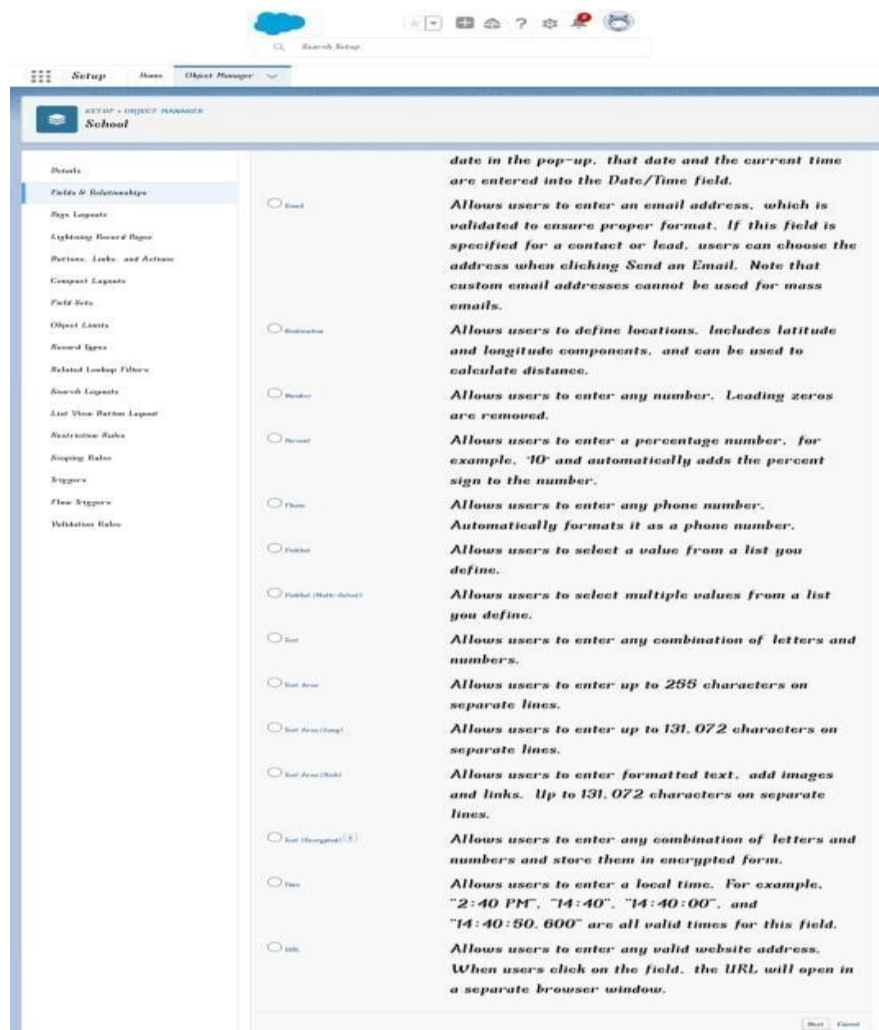
 From this select school object in the object manager and select field and relationship then click new. Now to create the customer field, from data types select text area and enter address for the field label then click save and new. Same procedure to create text area with district, state and school

as a field label. To create phone number as field label from phone as a data type.

Next to create roll up summary field as data type to calculate the number of students and highest mark as a field label.

Finally after finishing the field and relationship process the school object will be displayed like this.

ACTIVITY 2: Creation of the fields for the student object

To create phone number as a field label from phone as a data type and to create results as a from the picklist data type.
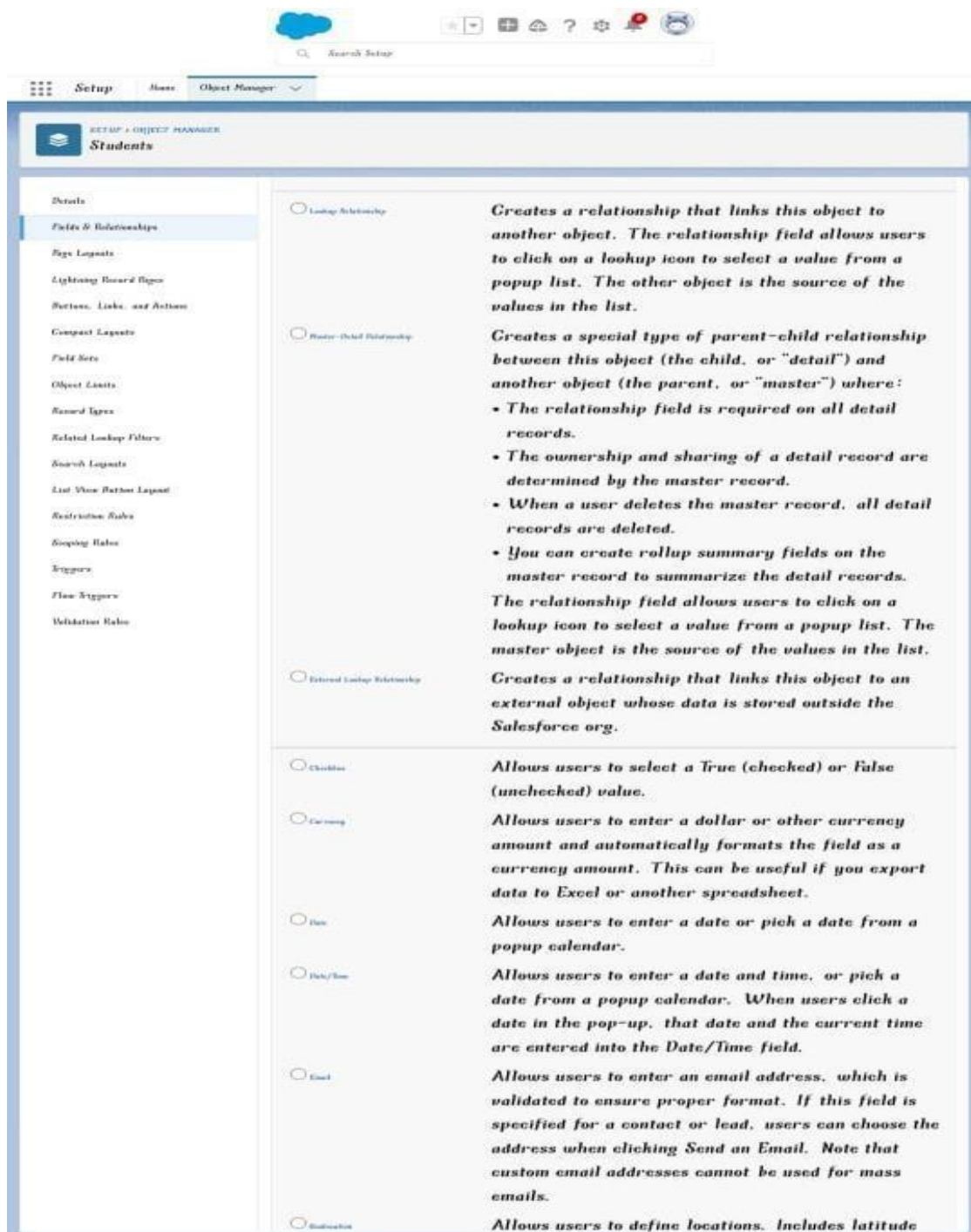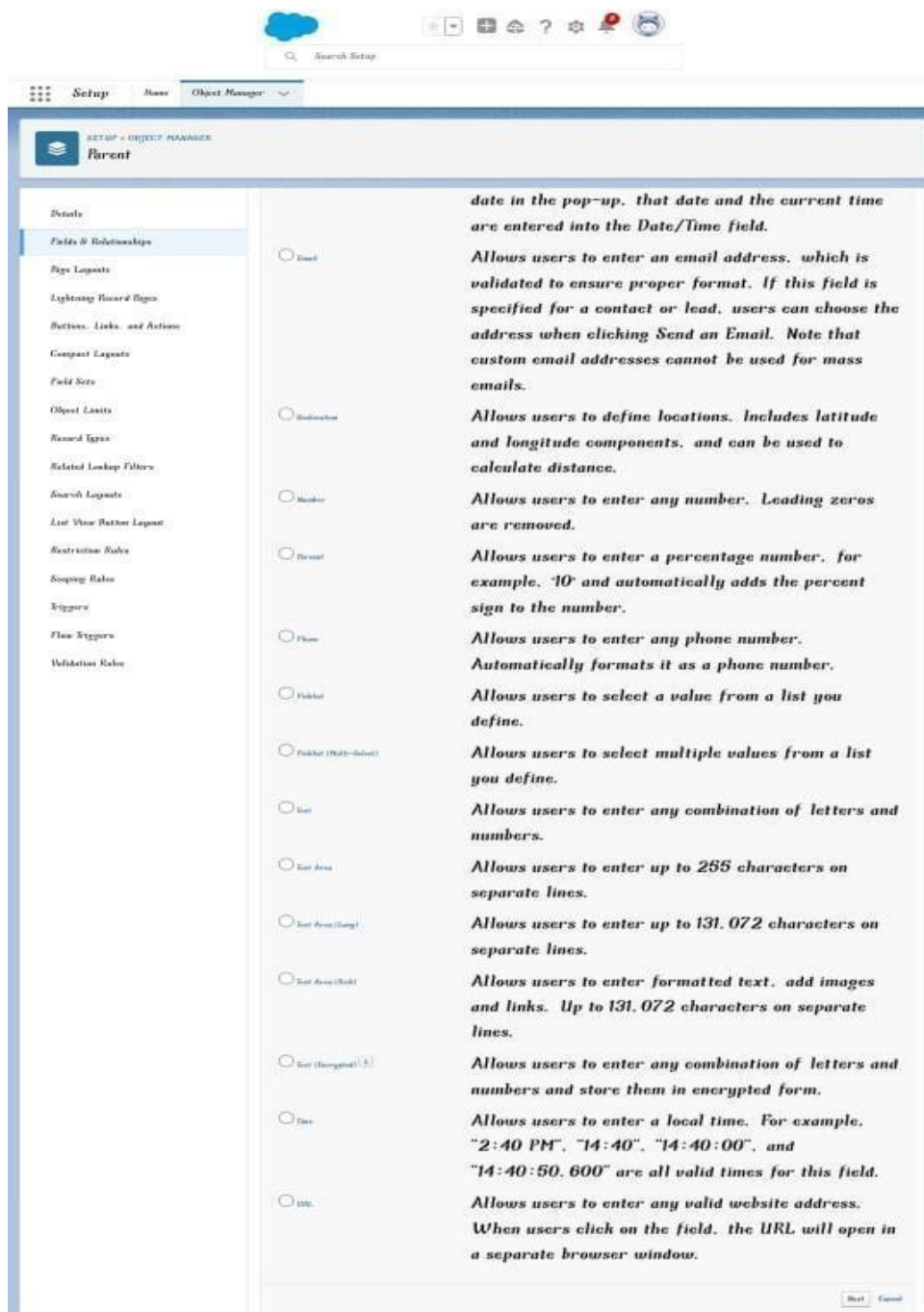
To create master detail relationship data type for student object. In number field data type, to create the class and marks as a field label.
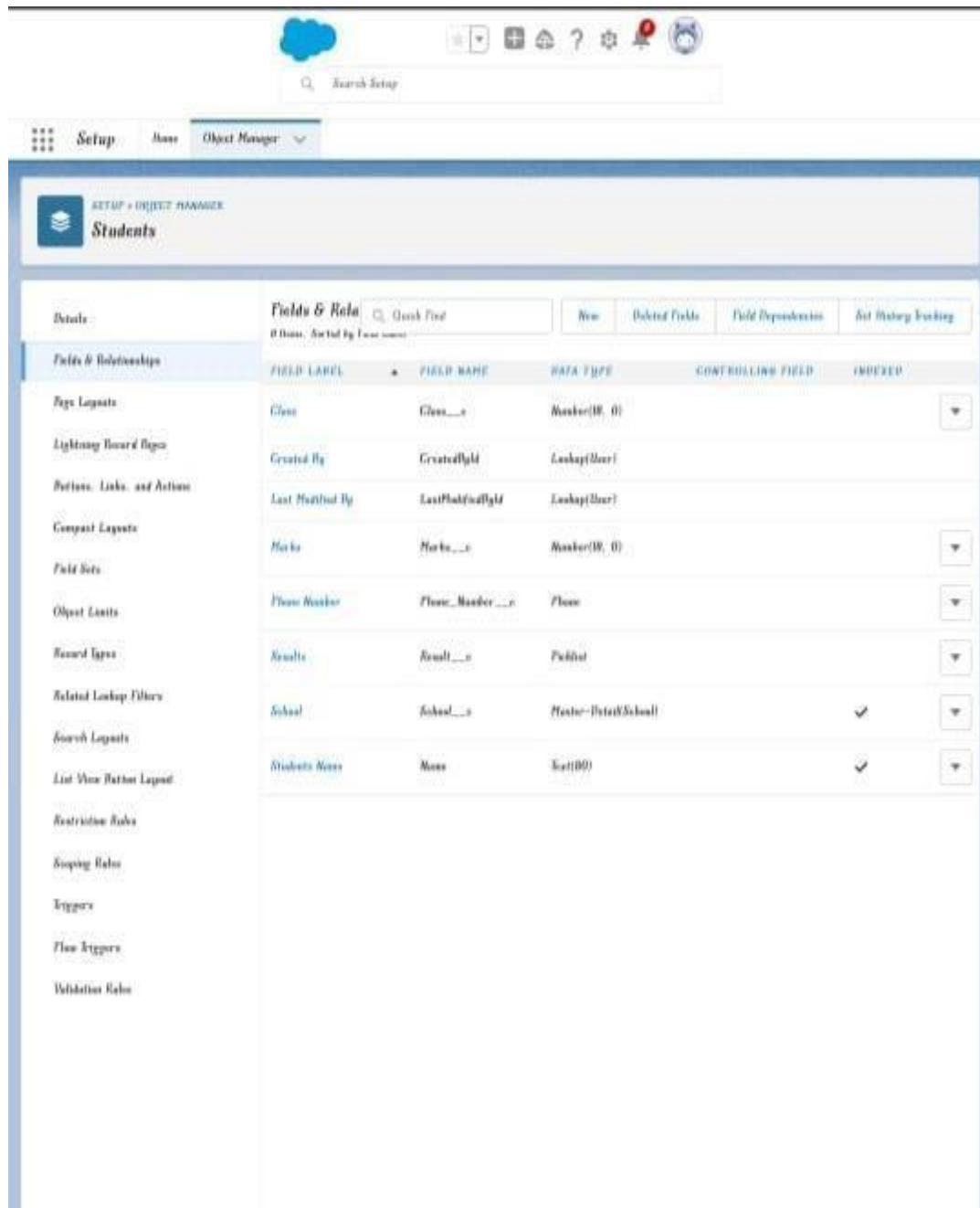
After finishing the process, the student object will be displayed like this.

ACTIVITY 3: creation of the field for the parent object

To create parent address in text area and data type and then enter phone number in phone data type .
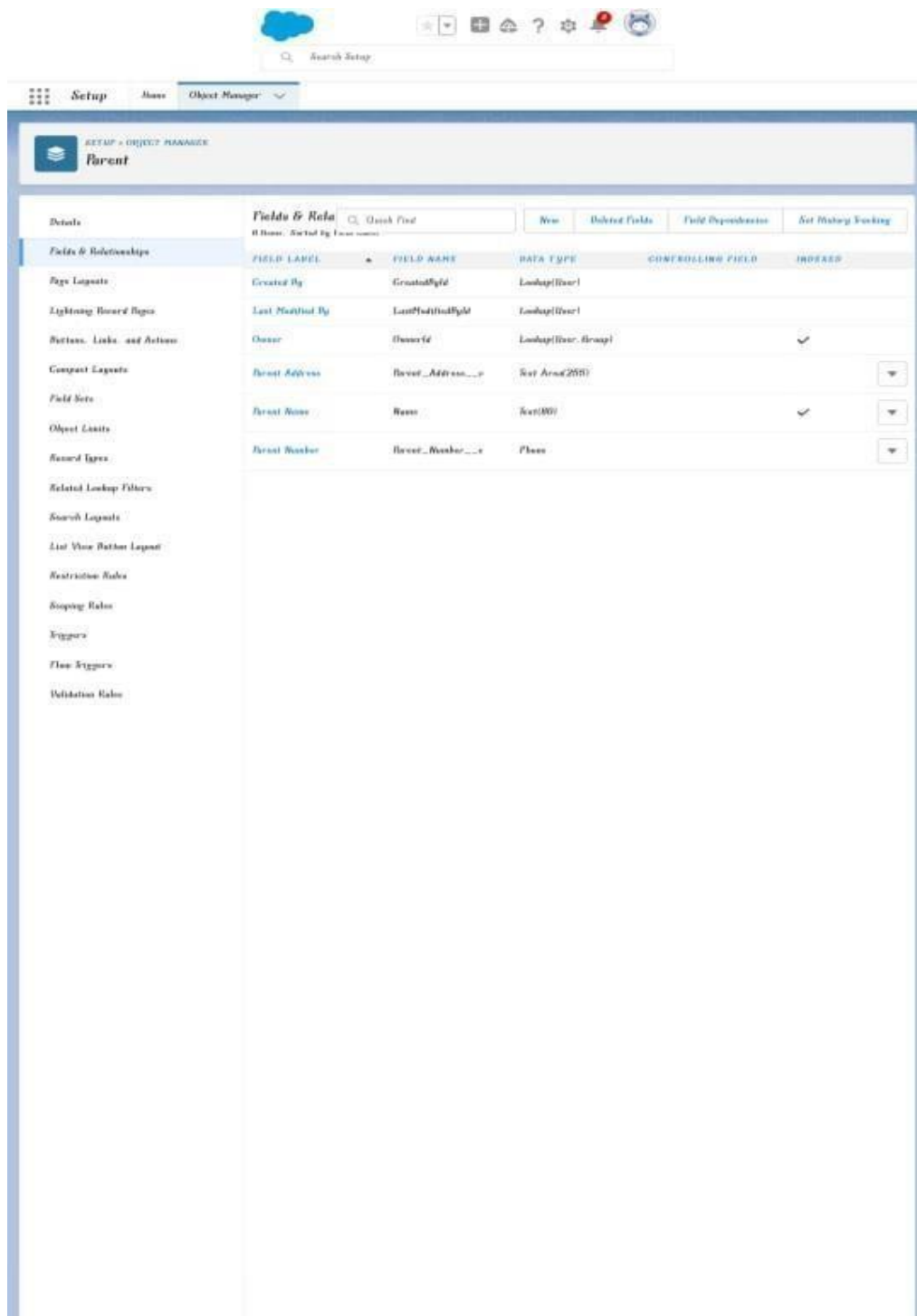
After that parent object will be displayed like this.

MILESTONE 5: PROFILE :

ACTIVITY: Creation on profile

From this select profiles in quick find and find standard user from list of profile then to click clone and give view all access permission for parent profiles .

MILESTONE 6: USERS :

ACTIVITY: creating a users

Select users in quick find and click new users and enter the username as parents and enter all the detail given in a procedure pdf. By the same procedure, to enter username as teacher and principal also.

Milestone 7: PERMISSION SET :

ACTIVITY: Permission sets 1

Select the permission sets in quick find then click new and enter name as teacher permission and then under object settings give edit permission and view create to all custom object in teacher user .

ACTIVITY 2: Permission sets 2

By same way , to create principal permission and edit all permission for the custom object in principal user.

MILE STONE 8 : REPORTS:

ACTIVITY: To create Reports
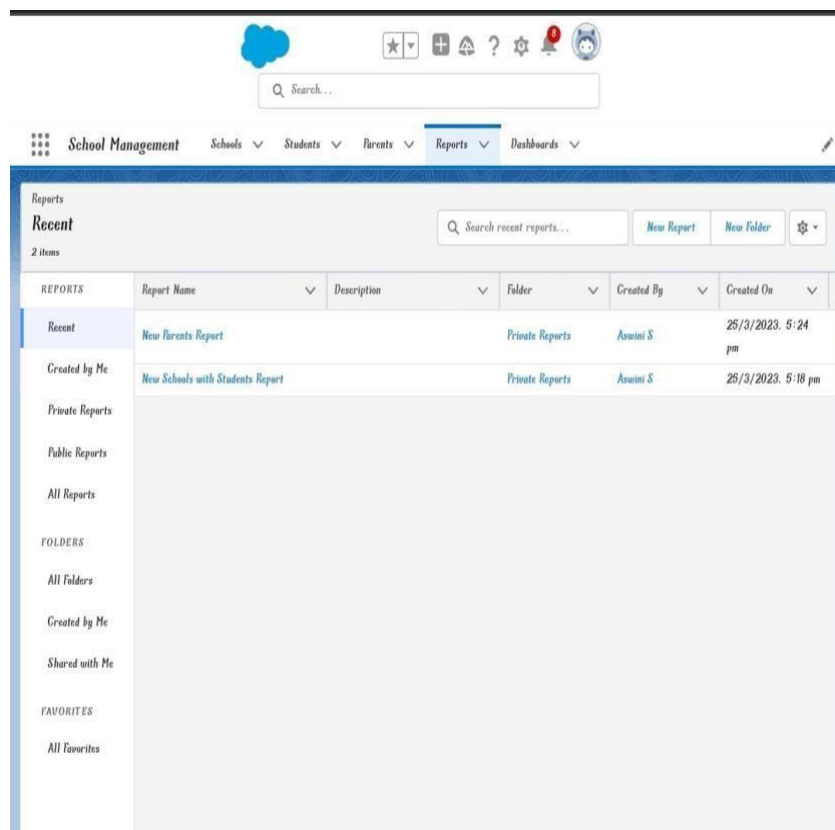
From the report tab then select the report type as school with students and parents for the reports and click create and customizing the report then click save & run it.

4. TRAIHEAD PROFILE PUBLIC URL:

- **TEAM LEAD: https://trailblazer.me/id/aswis24**

- **TEAM MEMBER 1: https://trailblazer.me/id/abits9**

- **TEAM MEMBER 2: https://trailblazer.me/id/abanujv**

- **TEAM MEMBER 3: trailblazer.me/id/bepsiba**

5 ADVANTAGE AND DISADVANTAGES:

ADVANTAGES

- **Customizable software that provides end to end functionality.**
- **Tools for an automated and online process .**
- **Available E-Book for all subjects .**

DISADVANTAGES

- **Lack of server to view results .**
- **Solid security features for data's .**

○ **Reporting capability is limited .**

6 APPLICATIONS:

○ **Used for all school and colleges.**

○ **Online admission process is applicable during pandemic period.**

○ **Online method E-books applied for differently abled students.**

7 CONCLUSION:

This project is to maintain and manage the school related problems which further can be modified based on the requirements.

In this project we have learnt how to create a developer account and login into salesforce

○ **Creation of object for school management, object for student and parents.**

○ **Creation of fields for school, student and parent object.**

○ **How to set profile, users, permission sets and reports.**

8. FUTURE SCOPE:

- ○ **In future CRM will be used in all schools.**
- ○ **It will be very useful during online admission.**
- ○ **It provides solid security for data's.**
- ○ **The future of CRM includes users who demand more functionality.**

----------- THANK YOU---------