

CRM APPLICATION FOR SCHOOL/ COLLEGE

INTRODDUCTION:

1.1OVERVIEW:

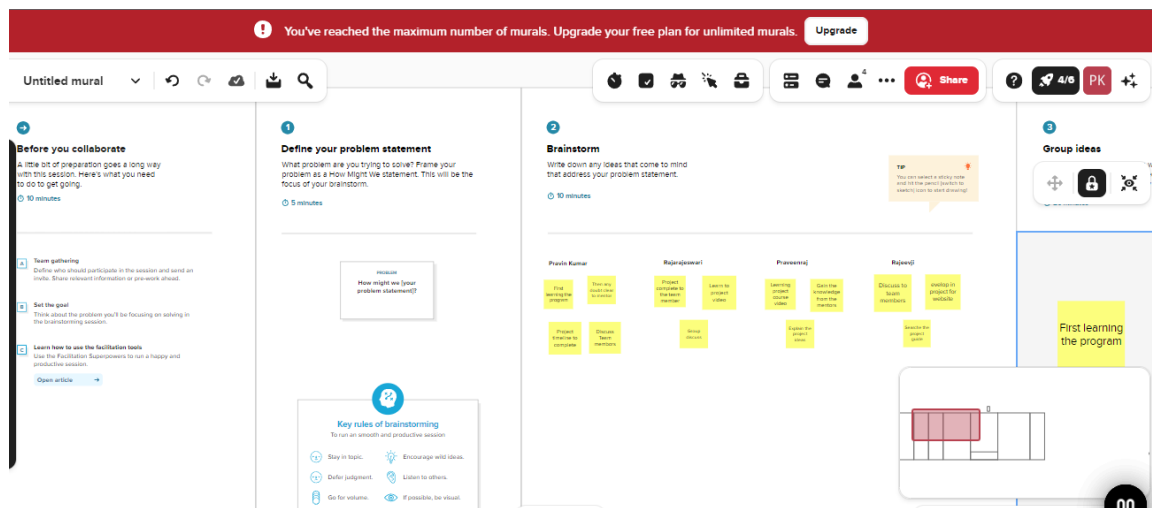
The CRM application for school/colleg A CRM system can help educational organisations effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalising communication and providing automated follow-up, educational organisation can build better relationships with students and leads, and keep them engaged over t.

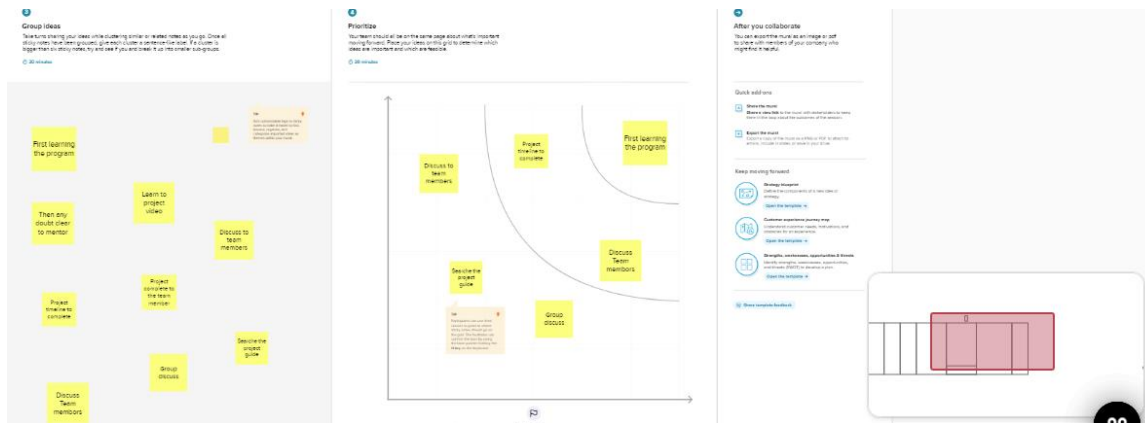
1.2PURPOSE:

The CRM Application for school/college purpose of maintain and manage the school related the problems which further can be modified based on requierments

PROBLEM DEFINITION& DESIGN THINKING

2.1Empatathy map:





3 RESULT:

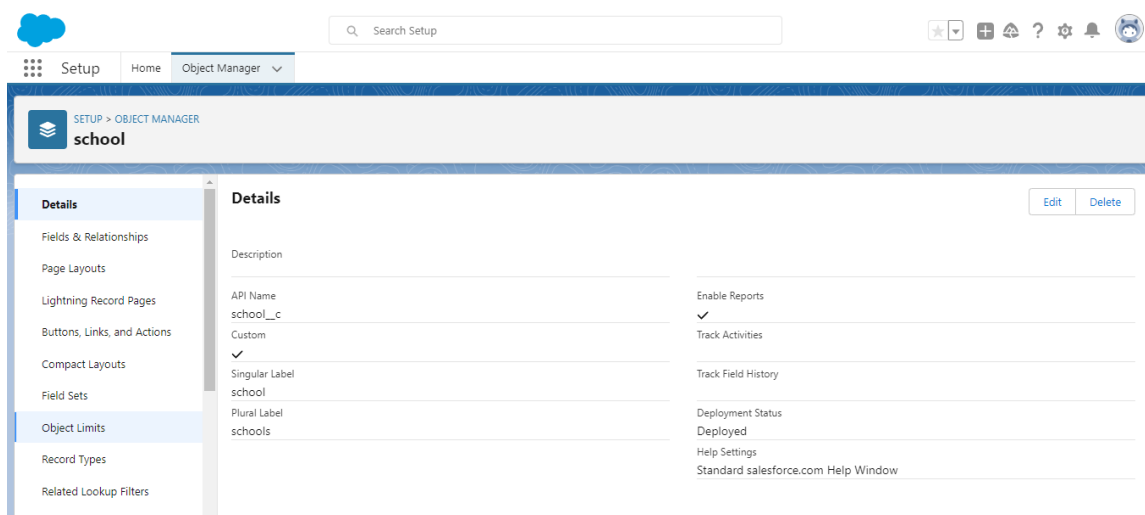
3.1 Data model:

OBJECT NAME

FIELD NAME

Obj.1	FIELD NAME	DATA TYPE
1.School	School	Text area
Obj.2	FIELD NAME	DATA TYPE
2.Student	phone number	phone
Obj.3	FIELD NAME	DATA TYPE
3.Parent	parent address	Text area

3.2 ACTIVITY AND SCREENSHOT:



Setup

Home

Object Manager

Search Setup

Users

Users

All Users

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: All Users | Edit | Create New View

New User | Reset Password(s) | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000rs3f5eab_ebzsgmevral@chatter.salesforce.com		✓	Chatter Free User
Edit	K. Rajarajeswari	RK	raika@comomv.salesforce		✓	System Administrator
Edit	S. Tamil	ts	rajarajeswari@rajaeswari17@gmail.com		✓	School profile
Edit	User Integration	integ	integration@00d2w00000rs3f5eab.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000rs3f5eab.com		✓	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

Setup

Home

Object Manager

students

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

Details

Description

API Name
students__c

Custom
✓

Singular Label
students

Plural Label
Students

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit | Delete

Setup

Home

Object Manager

Search Setup

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

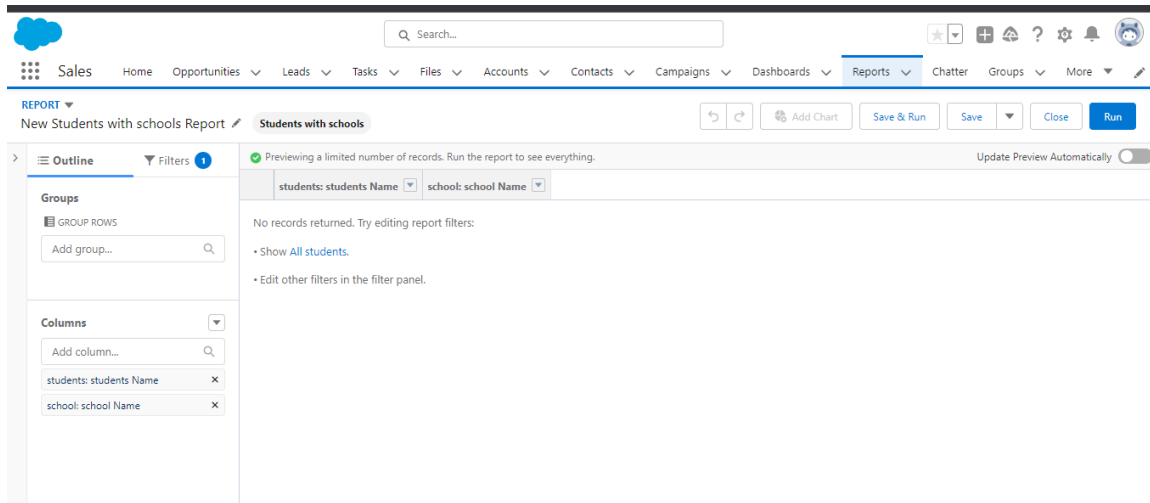
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

New | What Is This?

Action	Label	Tab Style	Description
Edit Del	Parents	Desk	
Edit Del	schools	Computer	
Edit Del	Students	Books	

New | What Is This?

No Web Tabs have been defined



4. TRAILHEAD PROFILE PUBLIC URL

Team lead- <https://trailblazer.me/id/pkumar4832>

Team member2-<https://trailblazer.me/id/hgahlot3>

Team member2- <https://trailblazer.me/id/rajem16>

Team member3- <https://trailblazer.me/id/rajak91>

5. ADVANTAGE:

- Trustworthy reporting.
- Dashboards that visually showcase data.
- Improved messaging with automation.
- Proactive service.
- Efficiency enhanced by automation.
- Simplified collaboration.
- 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.

6. DIS ADVANTAGE

- A costly project
- Loss of collected information or records
- Not suitable for every business
- It eliminates the human element.
- Can be accessed by the third party
- CRM is not fully customized
- Have poor usability
- Employee training is a must.
- Having lots of security concerns
- Centralized data is at stake.
- Experience-based procedure in all the stages

7.APPLICATION:

- A school management system is a software application that is designed to streamline various administrative tasks within a school. This system is designed to automate a range of processes such as student enrolment, course scheduling, fee management, library management, attendance tracking, and more
- Dashboard.
- Reporting and analytics.
- Inquiries and admission checking.
- Manage students records.
- Students' class performance monitoring.
- Staff progress tracking.
- Lesson progress monitoring.
- Financial monitoring and fee tracking.

8.CONCLUION:

Business on going process that has to remain in the competition. Before technology, customer data or CRM was based on papers, but slowly, companies started tracking customer-related data with spreadsheets, emails, address books, and other ways.

But due to a lack of automation and integration, it becomes difficult for them to find and share up-to-

date information when required quickly. It also down their ability to create marketing strategies, provide customers flawless service, and peruse new sales leads.

CRM is a powerful tool that automatically collects information about existing and prospective customers (their personal or professional information, including social media posts, phone numbers, email addresses, phone numbers, service, purchase history, and support tickets). Further, the whole information is integrated by the system and generates consolidated profiles that can be shared with appropriate teams. One of the best features of CRM is that it can connect with other business tools, such as document-sharing apps and online chat.

Artificial intelligence and business intelligence capabilities are built in CRM that accelerate administrative tasks and provide actionable insights. Customer relationship management's advantages and disadvantages will help you understand it in detail.

9.FUTURE SCOPE:

With the latest technologies being invented every day, CRM is also revolutionizing the sales industry. CRM is predicted to become more powerful in supporting customers-first, not company-first businesses. Bringing together disparate teams, data, and system integrations, the CRM of the future is set to be centralized and empowered by AI and mobile capabilities

the Internet of Things is designed to provide businesses with a maximum of customer information, as well as provide the ability to remotely fix problems by learning about them using sensors as quickly as possible. Thus, it will be automation, capable of not only affecting the events around the client in a targeted manner, but also able to forestall any troubles. In conjunction with CRM can get a really powerful solution.

The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations.
