

GOVERNMENT ARTS COLLEGE FOR WOMEN

SALEM-8

DEPARTMENT OF MATHEMATICS

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A CRM APPLICATION FOR SCHOOLS/COLLEGES

1 INTRODUCTION

1.1 Over view

A CRM is a system that helps schools manage the entire lifecycle of a potential customer sometimes also referred to as a lead. with a CRM, you can track and store your data that's important your operations, all in one easy to access place.

CRM for educational organisations-education institutes, colleges, universities need lead management software in order to manage the data.

The main aim of customer relationship management software is to accelerate productivity.

1.2 Purpose

It helps schools educational institutions automate admission processes and

manage communication with students and parents .

Success with follows a 60-30-10 rule.sixty percent of a successful CRM implementation is people.thirty percent is a good process and 10 percent is the computer program you use for CRM.

1.3 OBJECTIVE

CRM is used for any field, education too. In this, the lead management system manages the interaction of students, maximize the admission efficiency. The other features help in tracking the communication and manage the marketing and student admission cycle. The main aim of customer relationship management software is to accelerate productivity .

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy map



Empathy map

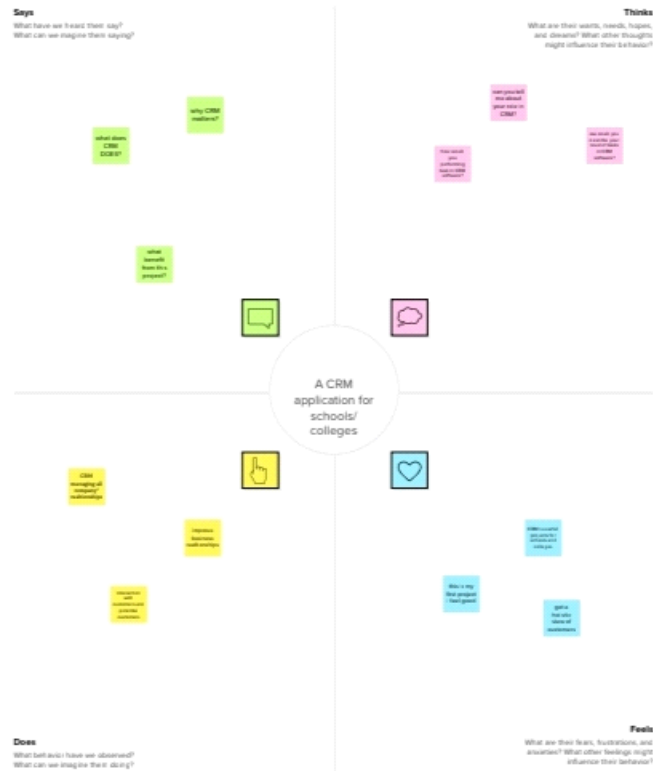
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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Build empathy

The information you add here should be representative of the observations and research you've done about your users.

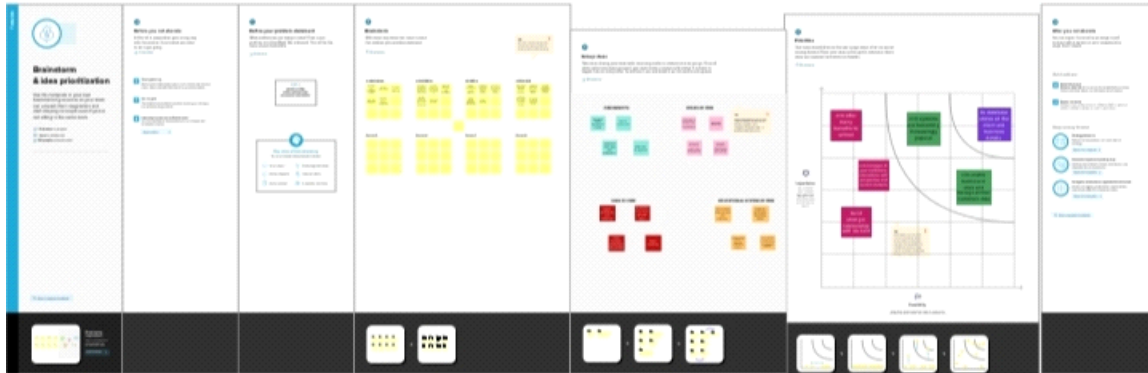


Need some
inspiration?

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2.2 Ideation & brainstorming map



3 RESULT

3.1 DATA MODEL

OBJECT NAME	FIELDS IN THE OBJECT	
SCHOOL	Field label	Data type
	Text area	Address
	Phone number	Phone
	Number of students	Roll-up summary
	Highest marks	Roll-up summary
STUDENT	Field label	Data type
	Phone number	Phone
	School	Master-detail relationship
	Results	Picklist
	Class	Number

PARENT		
	Field label	Data type
	Parent adress Parent number	Text area Phone

3.2 Activity & Screenshots

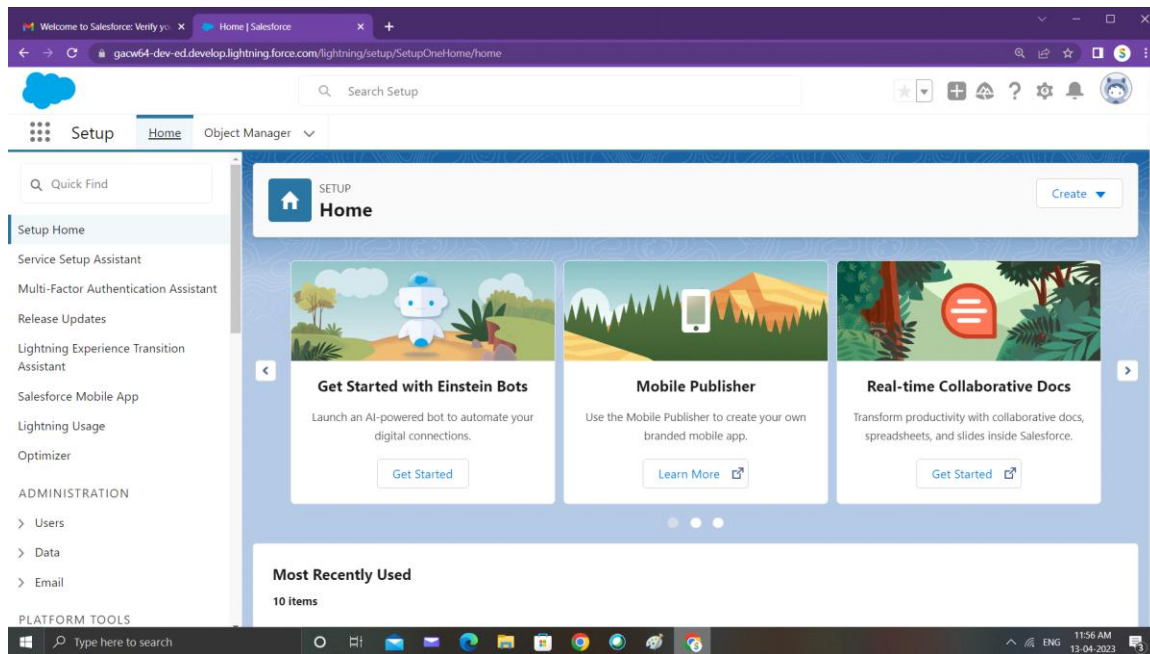
Milestone-1 Introduction

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity: Creating developer account

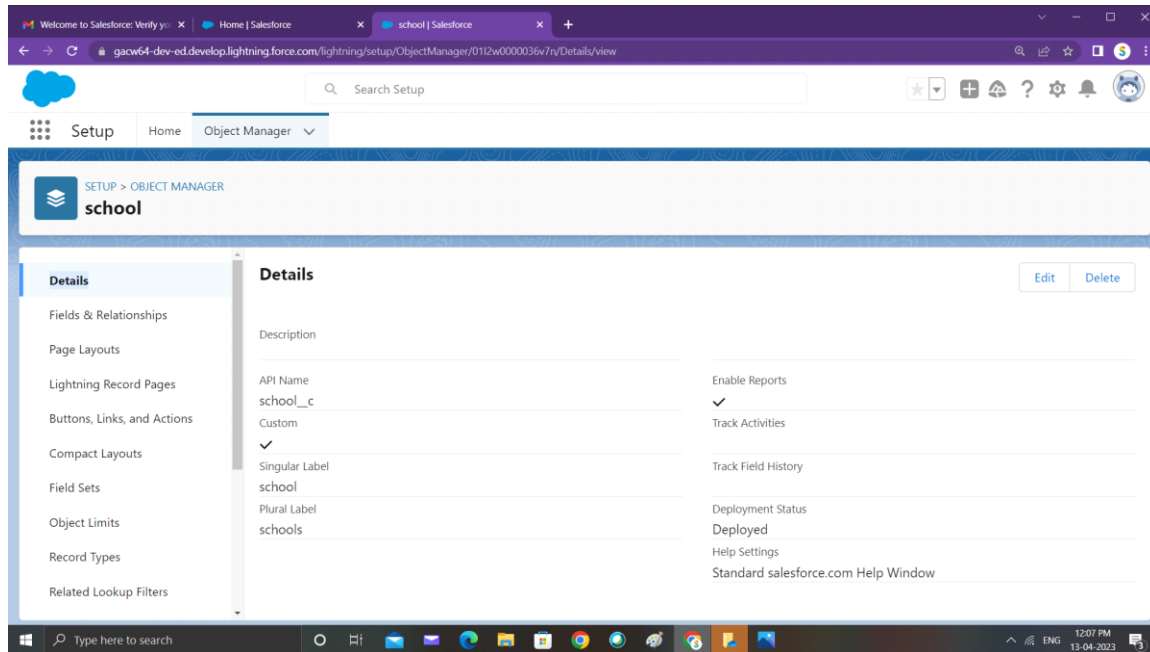


Milestone-2:Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Activity-1: Creation of school object

Creations of objects for school mangement:



Activity-2:create student object

The screenshot shows the Salesforce Setup interface for the 'student' object. The browser address bar displays the URL: `gacw64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000036vE1/Details/View`. The page title is 'student'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field is empty. The 'API Name' is 'student_c', and the 'Custom' checkbox is checked. The 'Singular Label' is 'student' and the 'Plural Label' is 'students'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link is 'Standard salesforce.com Help Window'.

Activity-3:Create parent object

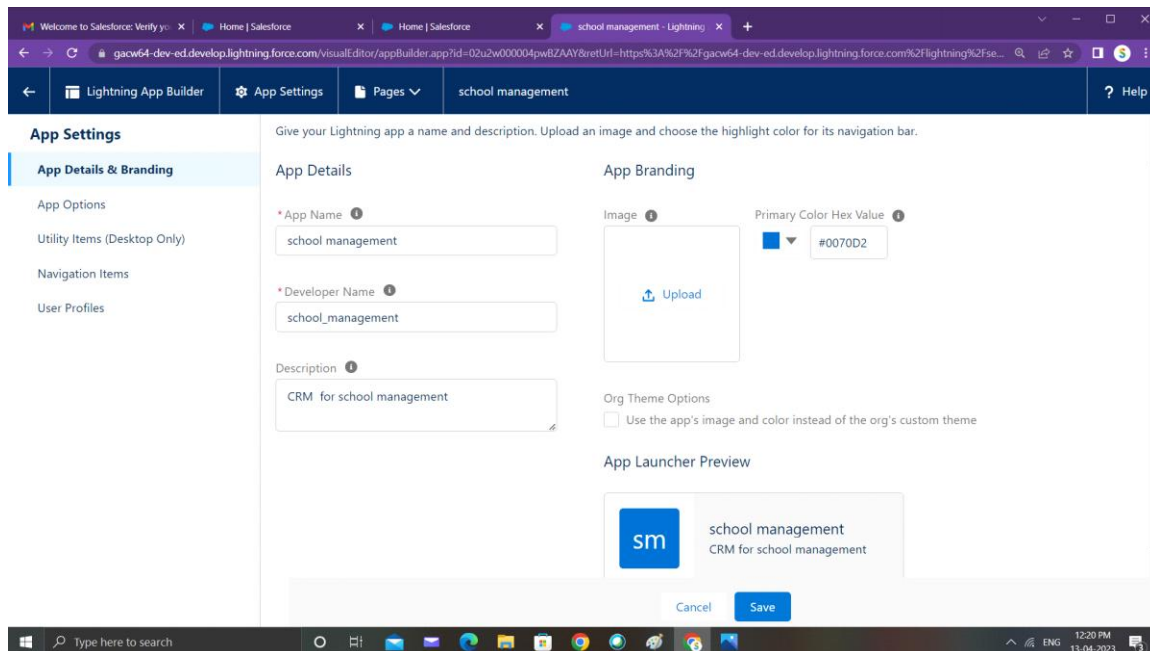
The screenshot shows the Salesforce Setup interface for the 'parent' object. The browser address bar displays the URL: `gacw64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000036vGT/Details/View`. The page title is 'parent'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field is empty. The 'API Name' is 'parent_c', and the 'Custom' checkbox is checked. The 'Singular Label' is 'parent' and the 'Plural Label' is 'parents'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link is 'Standard salesforce.com Help Window'.

Milestone-3: Lightning app

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs .

Activity:

Create the school management app

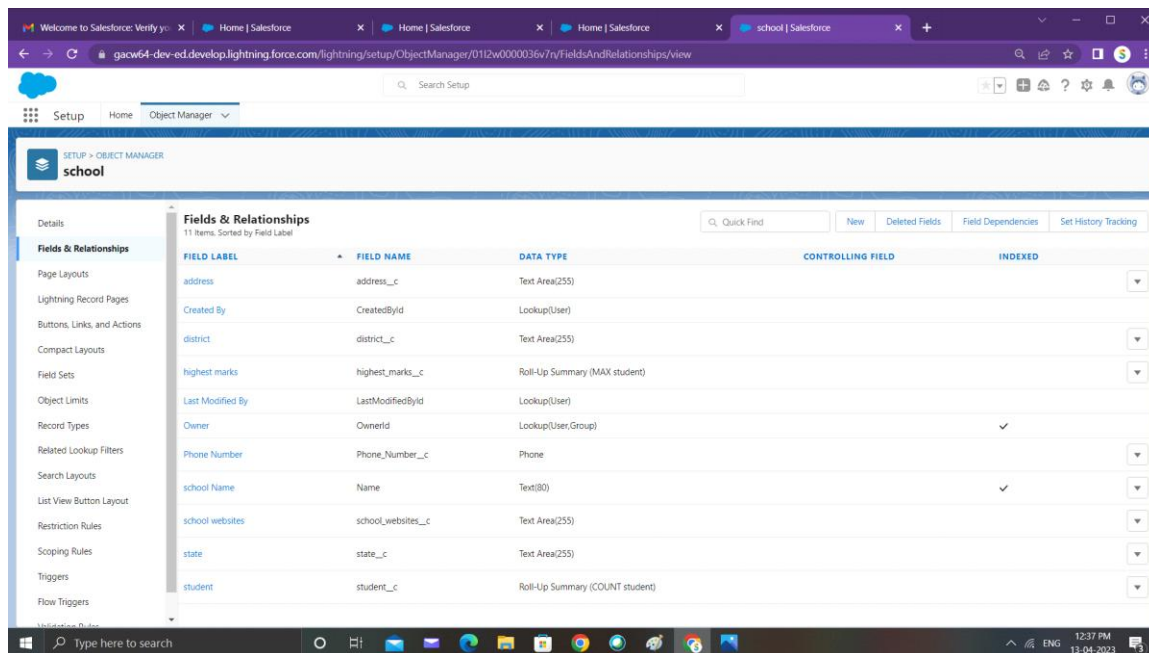


Milestone-4:Fields and Relationshi

An object relationship in Salesforce is a two-way association between two objects. 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.

Activity-1:

Creation of feilds for the school objects:



The screenshot displays the Salesforce Setup interface for the 'school' object. The 'Fields & Relationships' section is active, showing a list of 11 fields sorted by Field Label. The fields are as follows:

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)		
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)		
student	student__c	Roll-Up Summary (COUNT student)		

Activity-2:

Creation of feilds for the student objects:

The screenshot shows the Salesforce Setup interface for the 'student' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), marks (Number(18, 0)), Phone Number (Phone), results (Picklist), school (Master-Detail(school)), and student Name (Text(80)).

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)		✓

Activity-3: Creation of feilds for the parent objects

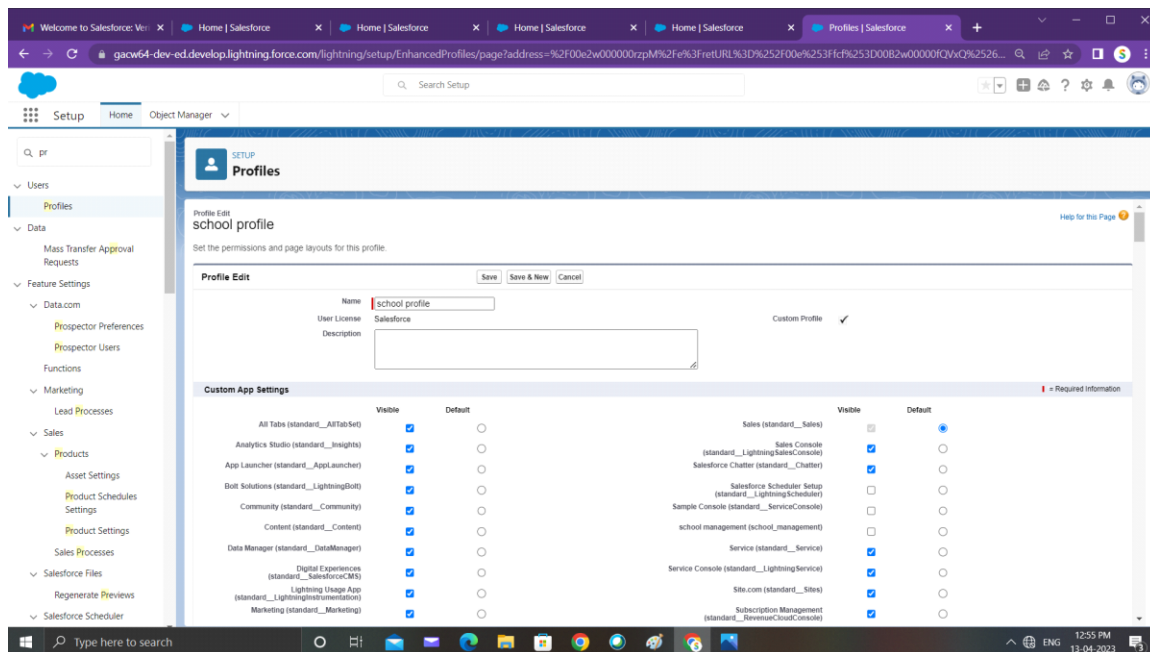
The screenshot shows the Salesforce Setup interface for the 'parent' object. The 'Fields & Relationships' section is active, displaying a table of 4 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), and parent Name (Text(80)).

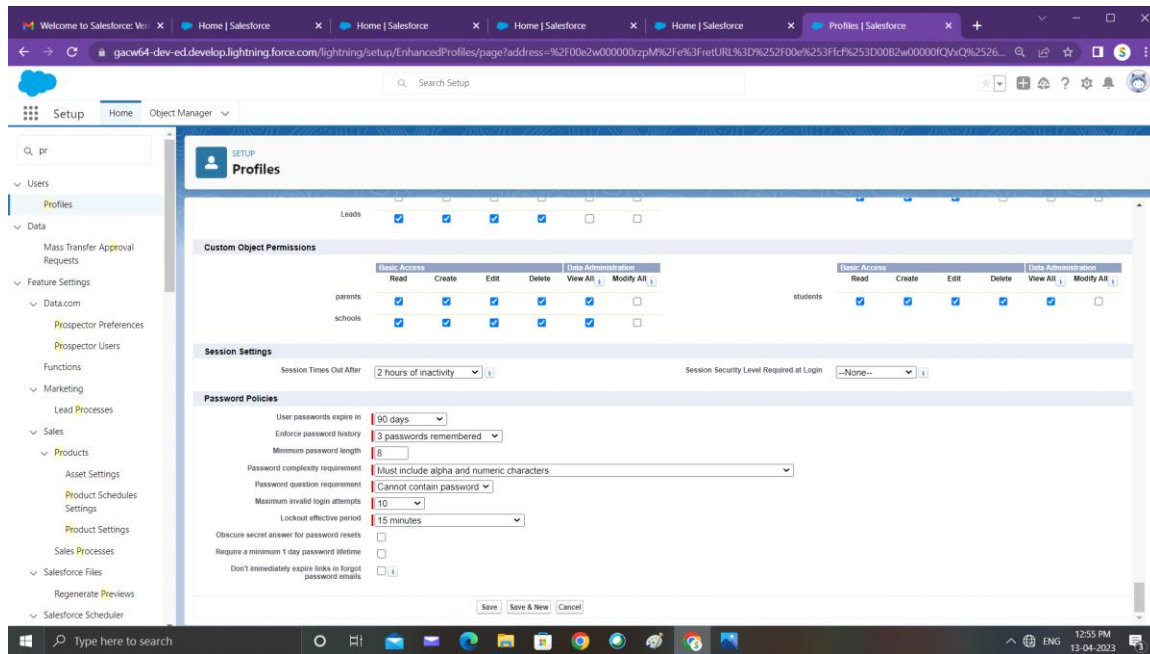
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
parent Name	Name	Text(80)		✓

Milestone-5:Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

Activity:creation on profile

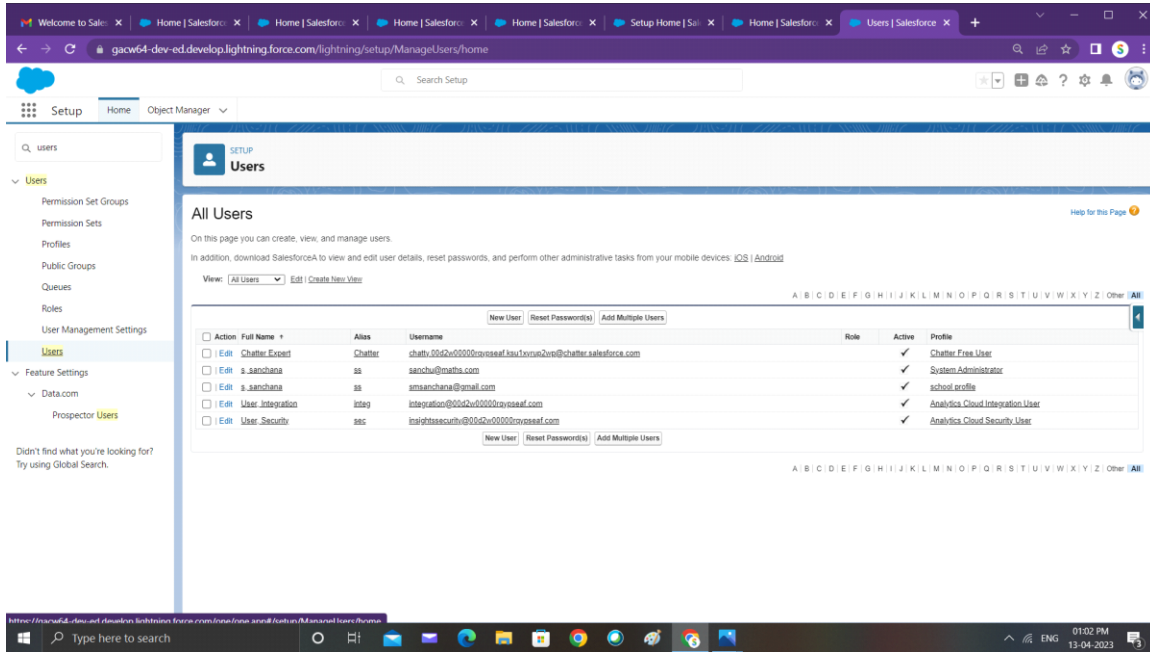




Milestone-6:Users

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. Every user in Salesforce has a user account.

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. Permission sets extend users' functional access without changing their profiles.

Activity-1:

Permission sets 1:Teacher permission

The screenshot displays the Lightning Force Setup console interface. The browser address bar shows the URL: `gacw64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000009qlZa`. The left sidebar contains navigation options: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'teacher_permission' and includes a 'Find Settings' search bar. Below this, the 'Permission Set Overview' section shows the API Name as 'teacher_permission', the Name as 'teacher_permission', and the Created By as 'admin@lightning.force.com'. The 'Apps' section lists various permission categories: Assigned Areas, Assigned Connected Apps, Object Settings, Bulk Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, Named Confidential Access, Custom Permissions, Custom Metadata Types, and Custom Setting Definitions. The 'System' section includes System Permissions and System Privileges. The bottom of the screen shows the Windows taskbar with the time 01:07 PM on 13-04-2023.

Activity-2:

Permission sets2:Principal permission

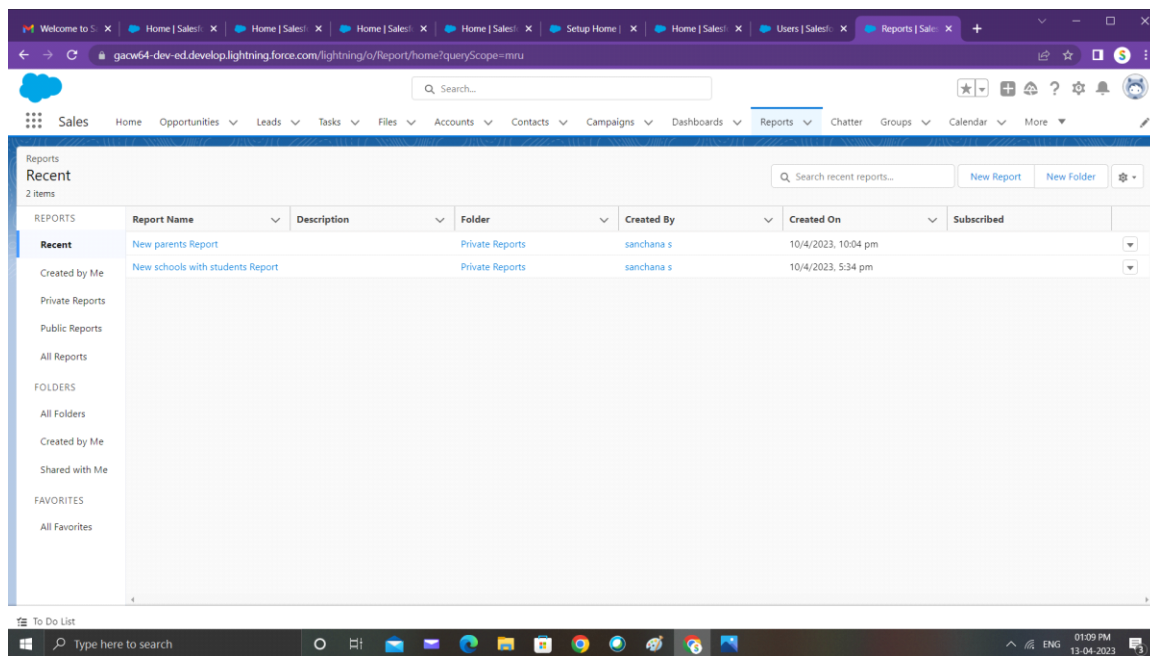
The screenshot displays the Lightning Force Setup console interface, similar to the first one. The browser address bar shows the URL: `gacw64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000009qlZa`. The left sidebar contains navigation options: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'principal_permission' and includes a 'Find Settings' search bar. Below this, the 'Permission Set Overview' section shows the API Name as 'principal_permission', the Name as 'principal_permission', and the Created By as 'admin@lightning.force.com'. The 'Apps' section lists various permission categories: Assigned Areas, Assigned Connected Apps, Object Settings, Bulk Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, Named Confidential Access, Custom Permissions, Custom Metadata Types, and Custom Setting Definitions. The 'System' section includes System Permissions and System Privileges. The bottom of the screen shows the Windows taskbar with the time 01:08 PM on 13-04-2023.

Milestone-8:Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

School with students and parents



4 TRAILHEAD PROFILE PUBLIC URL

Team leader:

SANCHANA.S- <https://trailblazer.me/id/ssuresh227>

Team member:1

SHARMILA.A- <https://trailblazer.me/id/shleo4>

Team member:2

SNEKA.M- <https://trailblazer.me/id/smurugan109>

Team member:3

SRISIVANI- <https://trailblazer.me/id/ssadhasivam3>

5 ADVANTAGE & DISADVANTAGE

Advantages:

1.Improved communication: CRM allows for better communication between the school and its

stakeholders. Schools can use CRM to send out newsletters, important announcements, and reminders to parents, students, and alumni.

2. **Better data management:** A CRM system can help schools to manage data more efficiently. This can include information such as student enrollment, academic records, and alumni data.

Disadvantages:

1. **Implementation costs:** Implementing a CRM system can be expensive, and smaller schools and colleges may not have the budget to invest in such technology.

2. **Limited impact:** A CRM system may not have a significant impact on the overall success of the school or college. Other factors, such as teaching quality and facilities, may have a greater impact on student satisfaction and recruitment.

6 APPLICATIONS

A CRM can be used to manage the entire admissions process, from initial inquiries to

enrollment. It can help track and organize applicant information, automate communication with prospective students and parents, and provide real-time data on application status and enrollment trends.

7 CONCLUSIONS

Overall, a CRM system can be a valuable tool for schools and colleges looking to improve their operations, enhance their relationships with students and stakeholders, and ultimately, achieve better outcomes for their students.

8 FUTURE SCOPE

The future scope of CRM for schools and colleges is significant, as more institutions recognize the benefits of using technology to manage relationships with their stakeholders. CRM for schools and colleges is likely to be shaped by advances in technology, changing student expectations, and the need for institutions to be more data-driven and customer-centric in their operations.

