PROJECT REPORT TEMPLATE

1.INTRODUCTION

1.1.OVERVIEW

A CRM (Customer Relationship Management) application for schools/colleges is a software system that helps educational institutions manage their interactions with students, parents, and other stakeholders. It typically includes features such as student information management, enrollment tracking, communication tools, scheduling and calendar management, reporting and analytics, and marketing automation.

The CRM system for schools and colleges can help streamline administrative tasks and improve communication with students and parents. It can also provide insights into student behavior and academic performance, which can inform teaching and learning strategies.

Some specific features that a CRM for schools/colleges may offer include:

1. Student profile management: The system allows administrators to manage student information such as demographics, academic history, and contact information.
2. Enrollment tracking: The CRM can automate the enrollment process, from application submission to acceptance and registration.
3. Communication tools: The system may include email and messaging tools to allow schools to communicate with parents and students easily.

4. Scheduling and calendar management: The CRM can provide an overview of upcoming events, including classes, exams, and extracurricular activities.
5. Reporting and analytics: The system can generate reports on student performance, attendance, and other metrics to help administrators identify areas for improvement.
6. Marketing automation: The CRM can help schools to promote themselves to prospective students by automating marketing tasks, such as email campaigns and social media posts.

In summary, a CRM application for schools/colleges can help educational institutions manage their relationships with students and parents, streamline administrative tasks, and gain insights into student behavior and academic performance.

PURPOSE:

Student data management: The CRM application can help schools/colleges to manage student data such as demographics, academic records, and contact information.

Enrollment management: The CRM application can help schools/colleges to manage the enrollment process from start to finish, including application submission, acceptance, and registration.

Communication management: The CRM application can provide tools to help schools/colleges communicate with students and parents effectively, including email, messaging, and other communication tools.

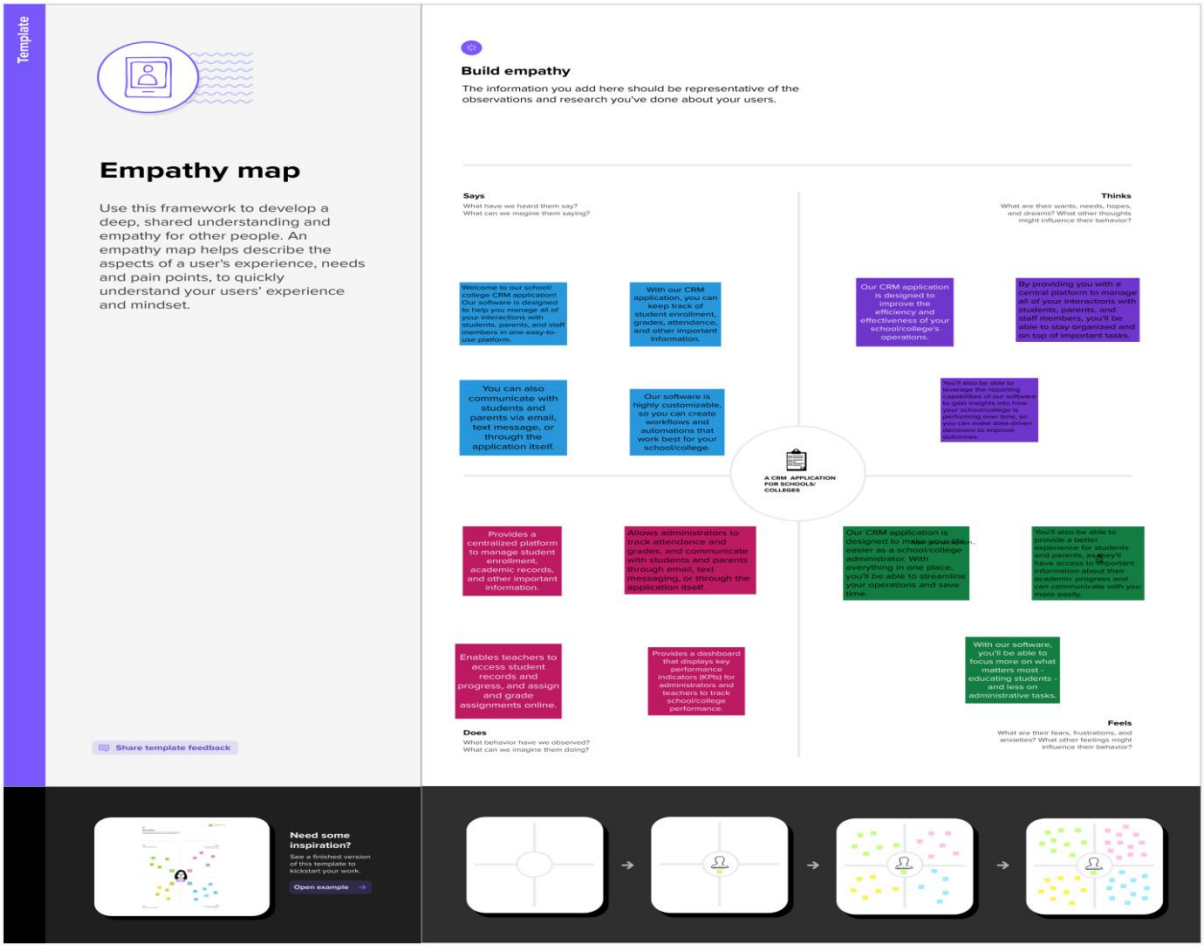
Scheduling and calendar management: The CRM application can help schools/colleges manage schedules and calendars for classes, events, and activities.

Reporting and analytics: The CRM application can provide insights into student behavior and academic performance, allowing schools/colleges to identify areas for improvement.

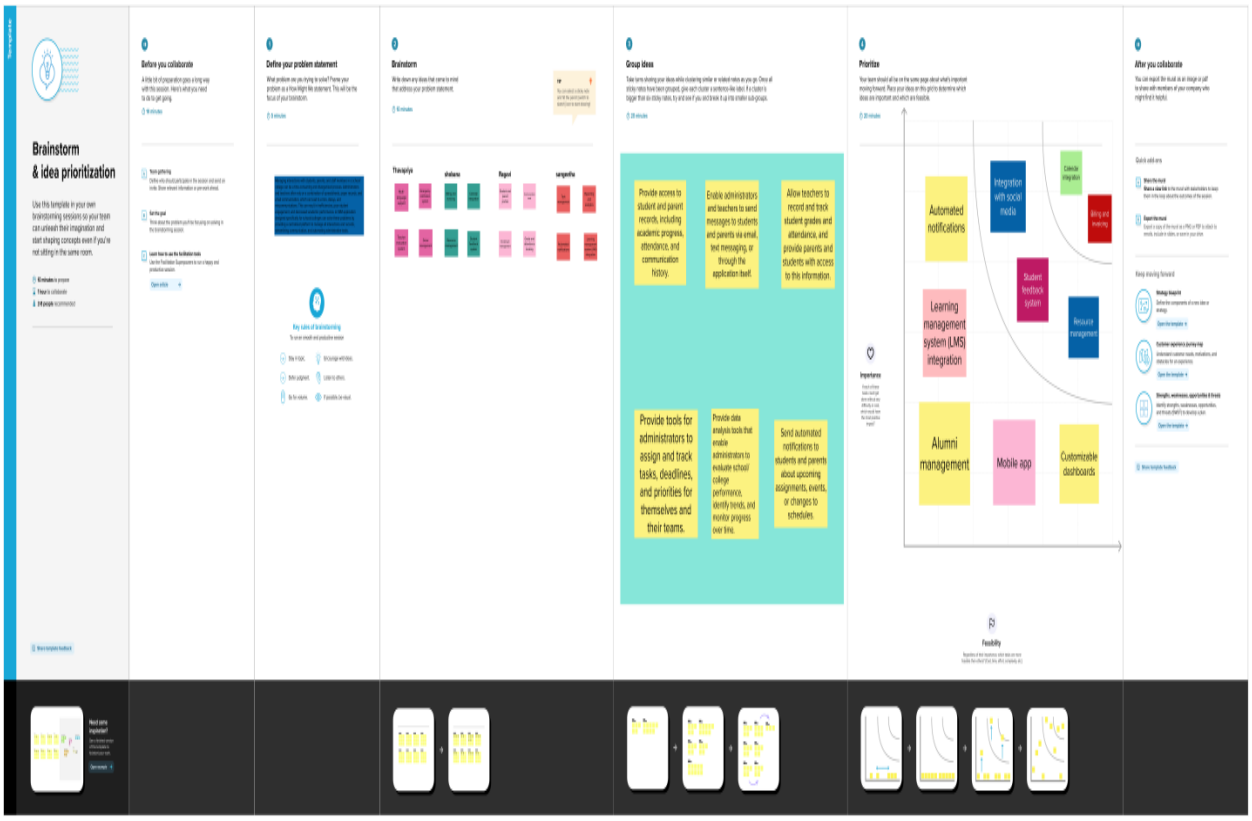
Marketing automation: The CRM application can help schools/colleges to promote themselves to prospective students by automating marketing tasks such as email campaigns and social media posts.

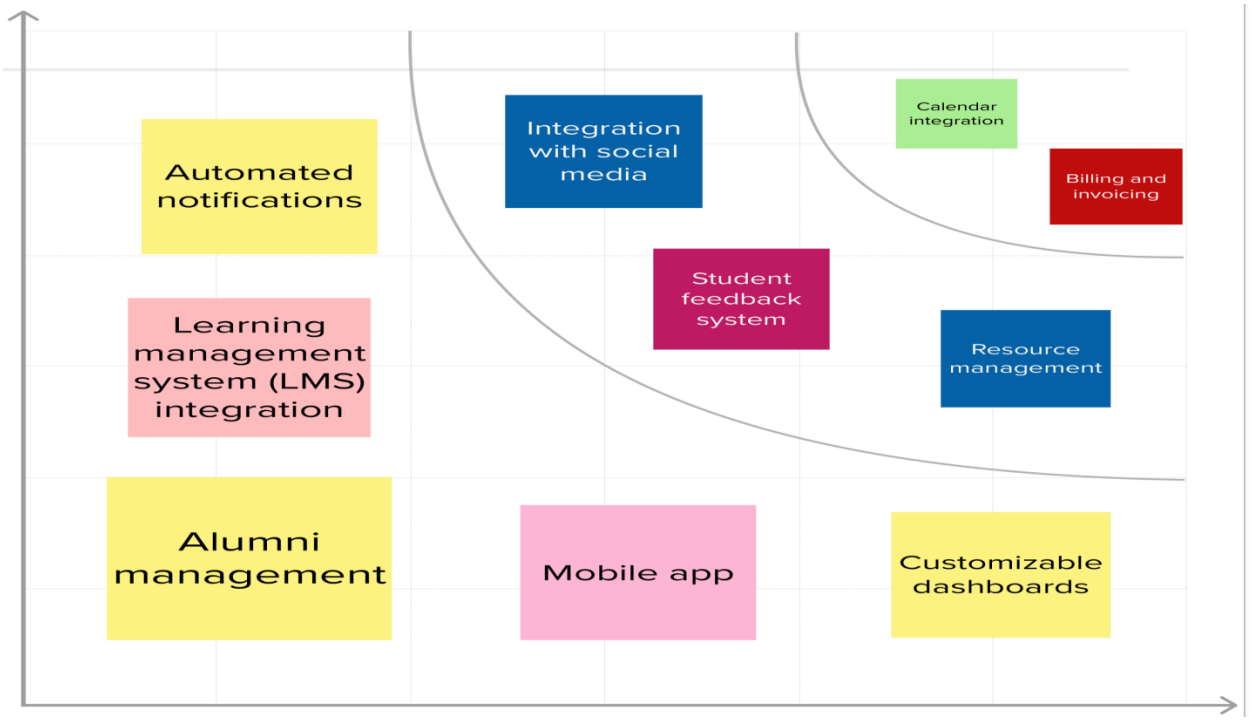
PROBLEM DEFINITION &DESIGN THINKING

2.1.EMPATHYMAP



2.2 IDEATION & BRAINSTROM





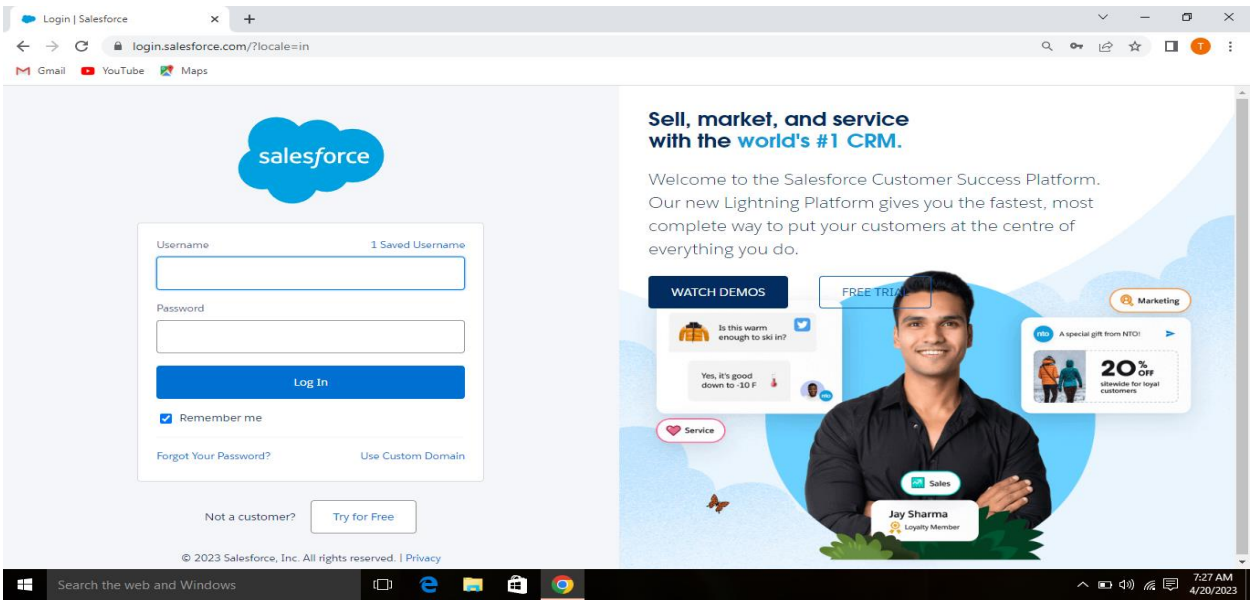
3.RESULT

3.1 DATA MODEL:

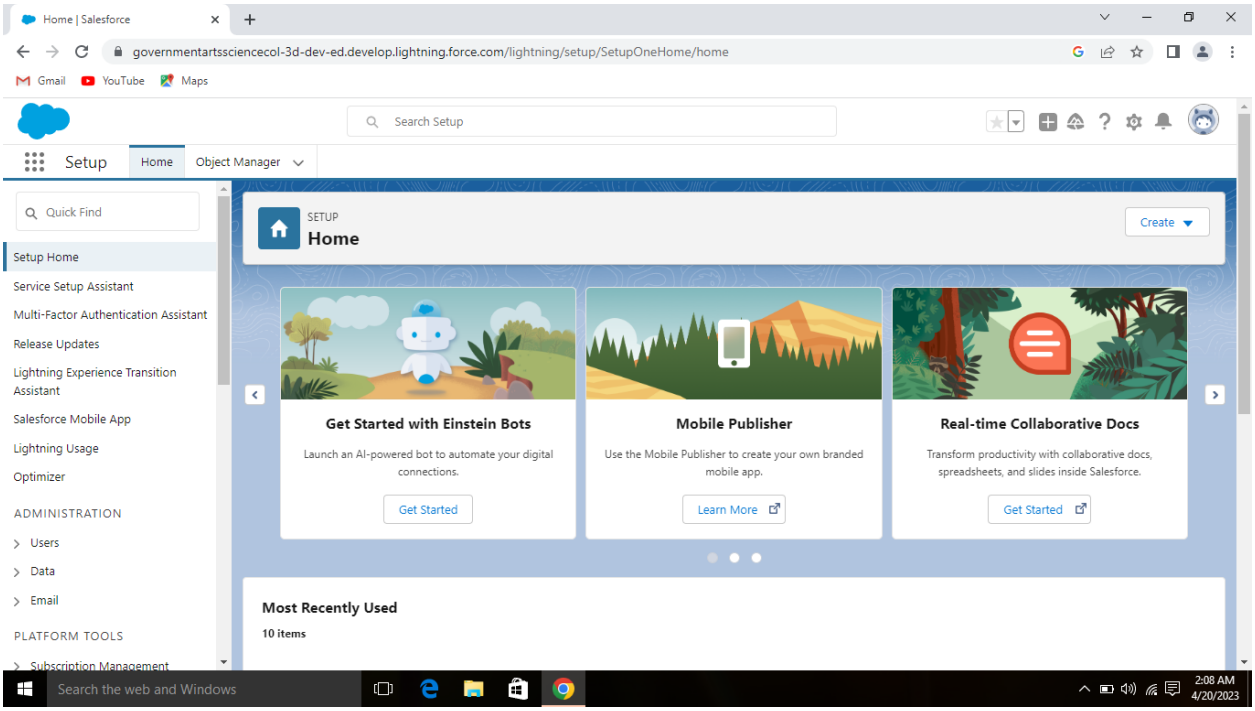
OBJECT TYPE	*FIELD IN OBJECT*	
1)SCHOOL	*FIELD LABEL*	*DATA TYPE*
	Address	*Text area*
	District	*Text area*
	state	*Text area*
2)STUDENT	*Class*	*number*
	number	*number*
	marks	*number*
3)PARENT	*Parent address*	*Text area*
	Parent number	*phone*

3.2 ACTIVITY&SCREENSHOT

1. Activity –(create salesforce account)

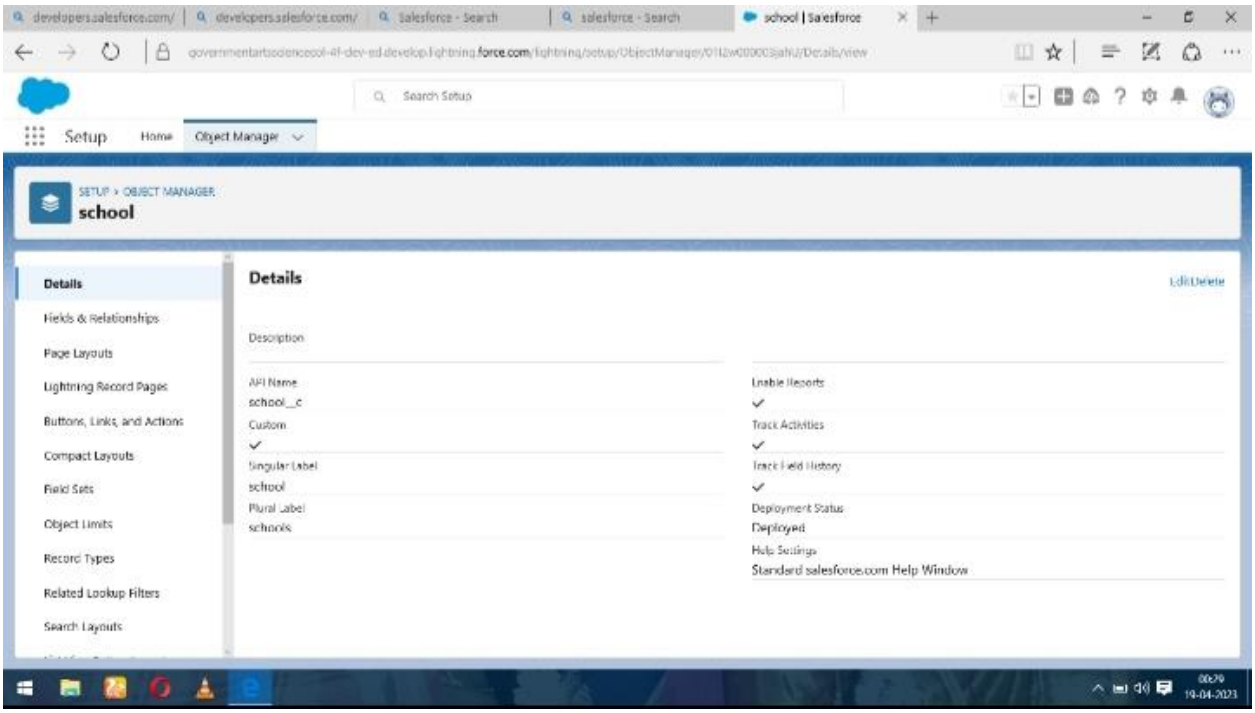


2. Activity -2(account activation)



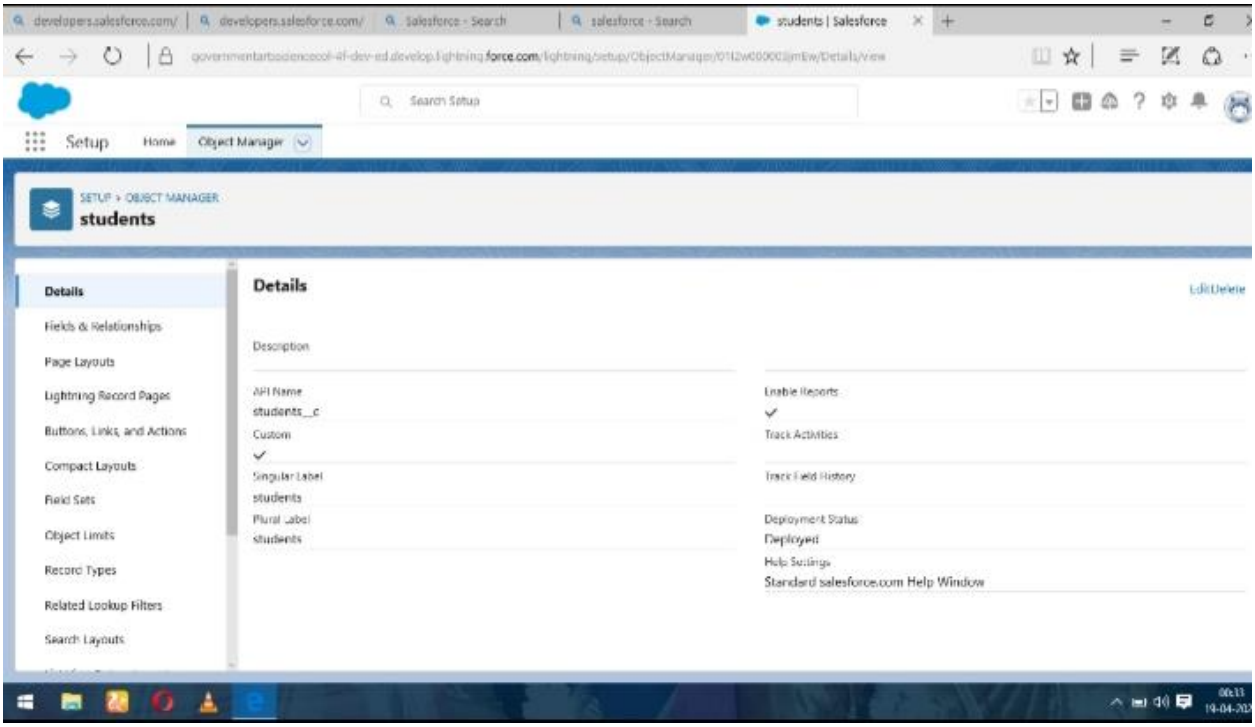
3. Activity-3(OBJECT CREATING)

School object:



A school and college CRM application is a comprehensive software tool designed to streamline and manage interactions between schools, students, and parents. The application acts as a centralized database that can be accessed by administrators, teachers, parents, and students to share information and improve communication

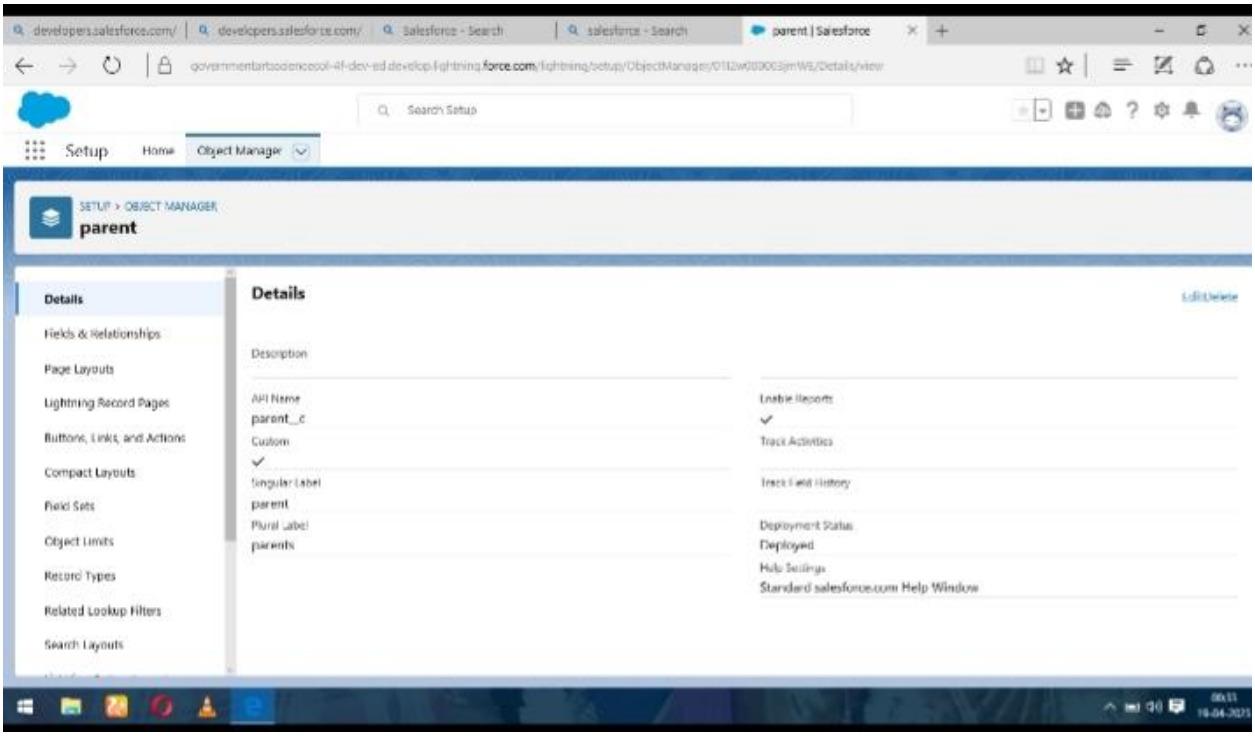
STUDENT OBJECT



DESCRIPTION

The student module allows for easy enrollment and registration, while tracking their academic progress and attendance. It allows students to access their schedules, homework assignments, and exam results, all in one convenient location. The module also offers the option for students to pay fees, view their transcripts, and communicate

PARENT OBJECT



DESCRIPTION

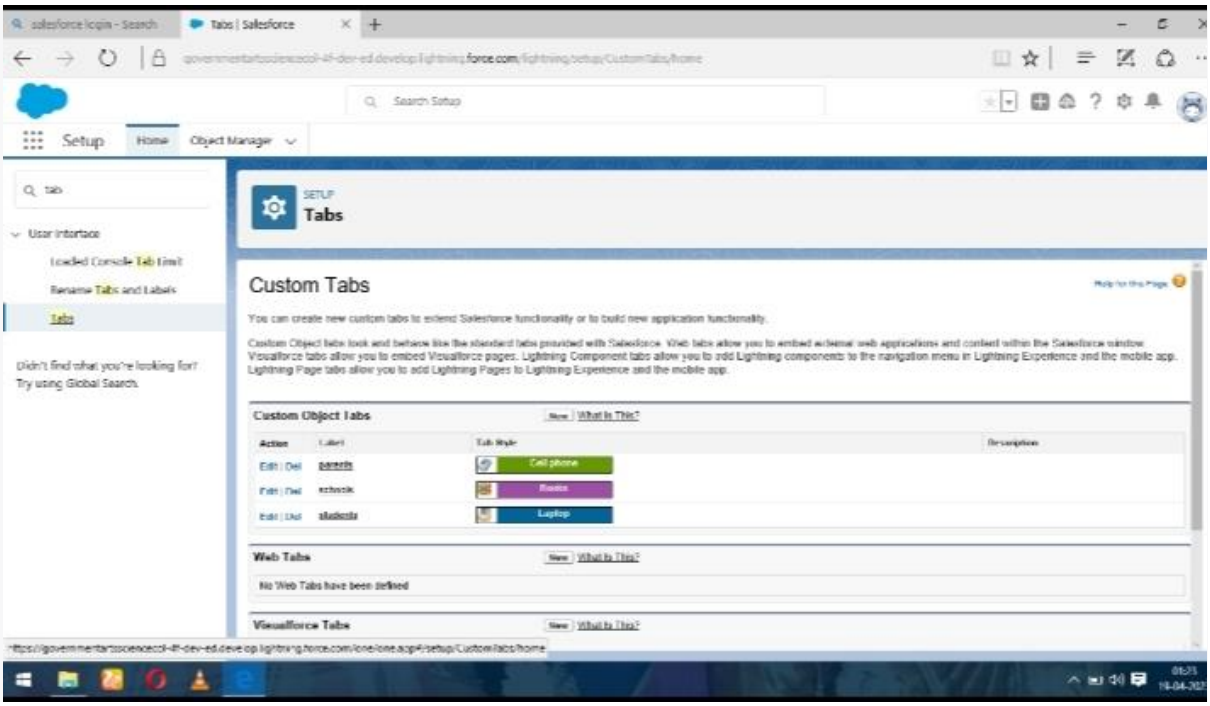
The parent module enables parents to stay informed about their child's progress and academic activities. They can access their child's academic reports, attendance records, fee details, and other important information. The module also provides a direct channel for parents to communicate with teachers, allowing them to stay up-to-date with their child's academic and personal growth.

The school module enables administrators and teachers to manage the entire school or college, from admissions and student records to classroom management and attendance. They can schedule classes, assign homework, manage exams, and monitor student progress. It also provides tools for managing the school's finances, including fee collection, billing, and expense management.

Overall, a school and college CRM application helps schools and colleges create a more efficient and effective communication

system between students, parents, and administrators. It provides a platform for real-time information sharing, improving transparency, and enhancing the overall educational experience.

CREATE TAB

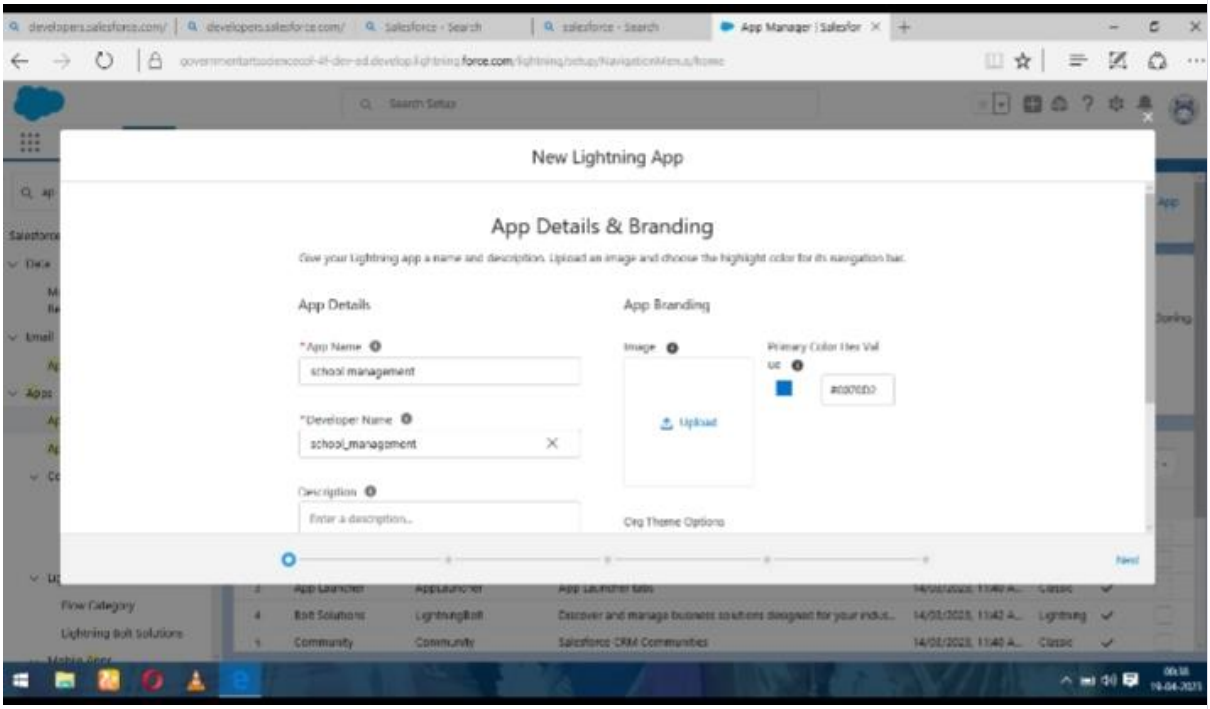


DISCRIPTION

The CRM application for schools and colleges is a powerful tool designed to streamline administrative tasks and improve communication between staff, students, and parents. With this application, schools and colleges can easily manage student enrollment, track student progress, and communicate important information to parents and guardians.

The application features a user-friendly interface that allows staff to easily manage student data, including enrollment, attendance, grades, and more. Teachers can use the application to enter grades, post assignments, and communicate with students and parents about their progress. Parents can also use the application to view their child's grades, attendance, and progress, as well as communicate with teachers and staff.

LIGHITING APP



DISCRIPSTION

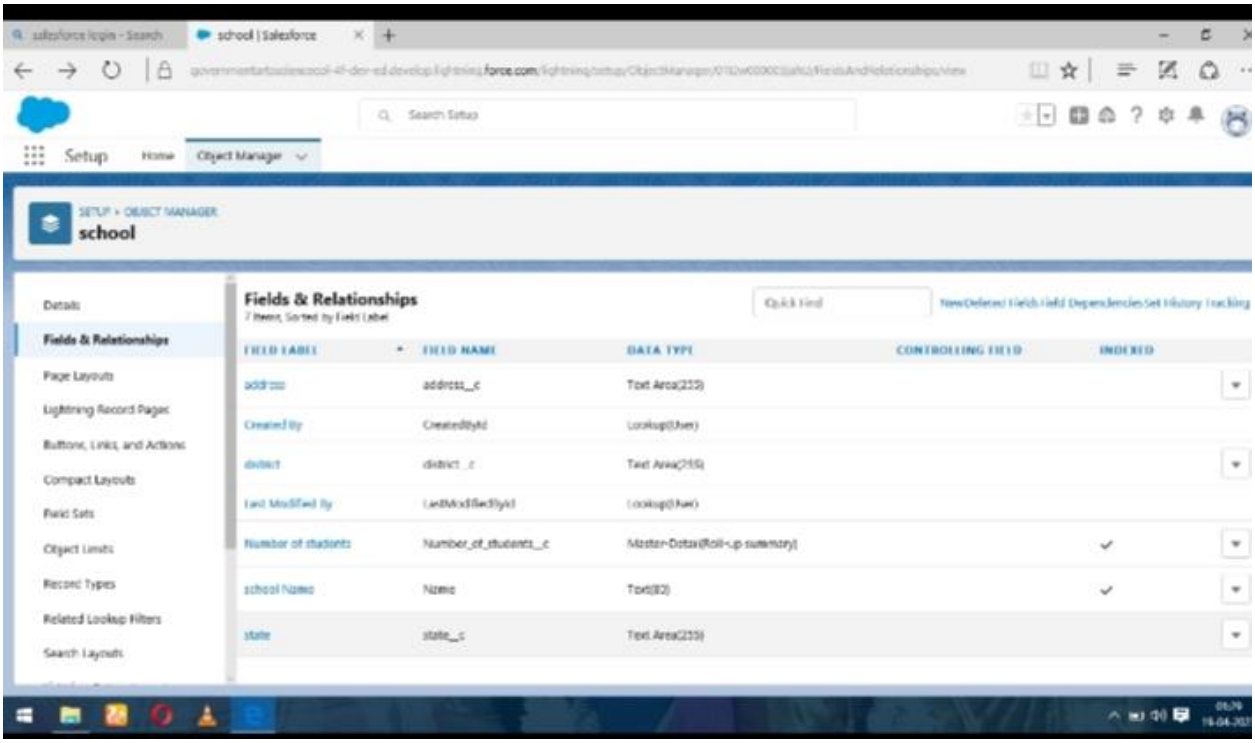
Lighting App:

1. Home: The home tab displays the user's personalized lighting scenes and allows them to control their lights with just a few taps. Users can also access other features of the app, such as scheduling and grouping lights.
2. Scenes: The scenes tab displays a variety of preset lighting scenes for different moods or occasions, such as "Movie Night" or "Party Time." Users can choose from these presets or create their own custom scenes.
3. Timers: The timers tab allows users to set timers for their lights, so they turn on and off automatically at specific times. Users can set up one-time or recurring timers for each light or **group** of lights.

4. Groups: The groups tab displays all the groups of lights that the user has created. Users can easily turn groups on or off and adjust the settings for each group.
5. Profile: The profile tab allows users to create profiles for different rooms in their home or business, so they can quickly switch between different lighting setups.

CREATE FIELDS & RELATIONSHIPS

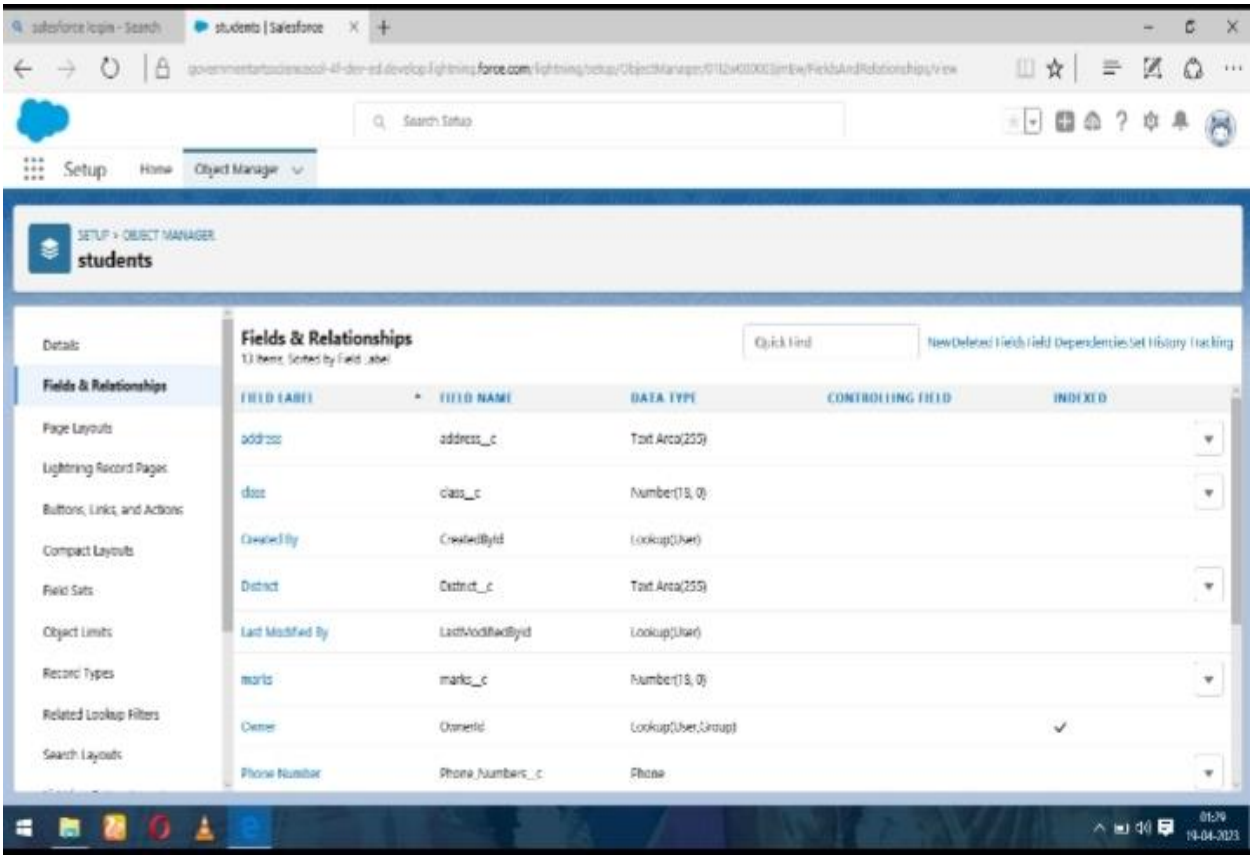
School fields and relationships



DESCRIPTION

The "School" field is the primary field in the CRM, and it contains information related to the school such as the name, address, contact details, and other relevant details. It also includes information related to the faculty and staff members such as their names, contact details, and roles in the school.

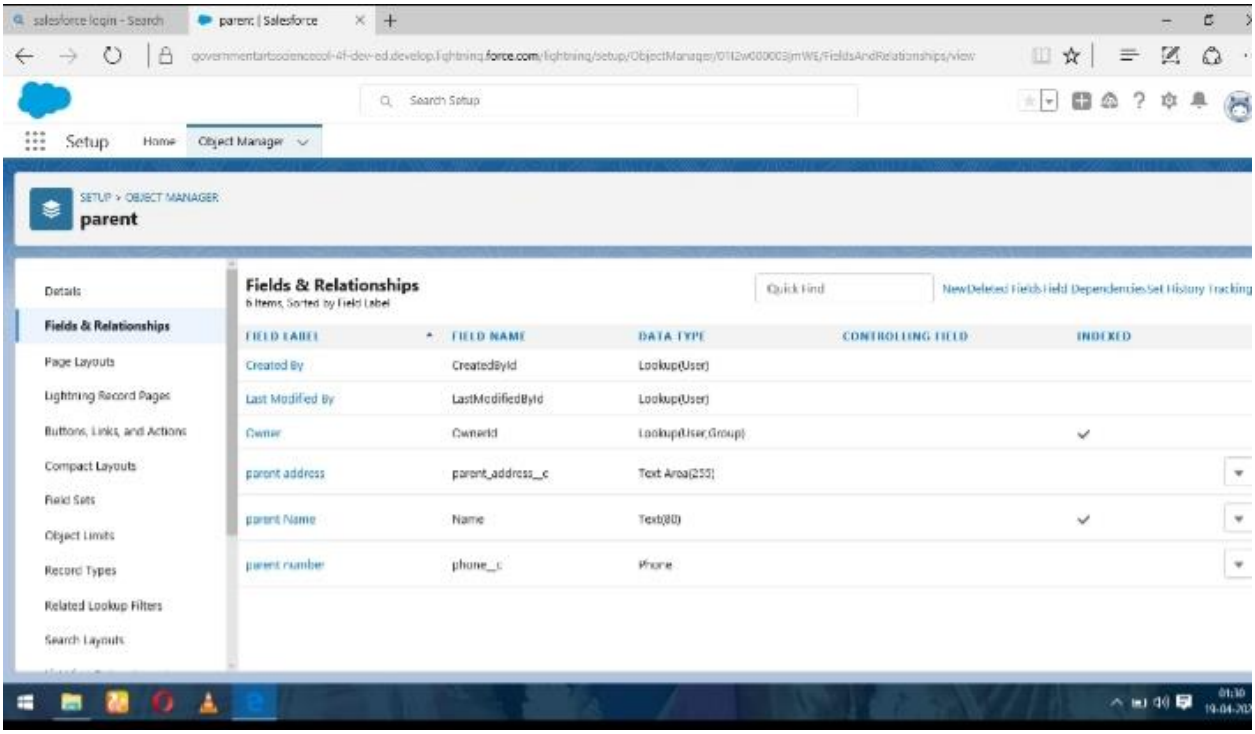
STUDENT FIELD AND RELATIONSHIP



DISCRIPTION:

The "Student" field contains information related to the students enrolled in the school or college, including their names, contact details, academic performance, attendance records, and any other relevant details. This field also includes information related to the courses or programs in which the student is enrolled and their progress in those programs.

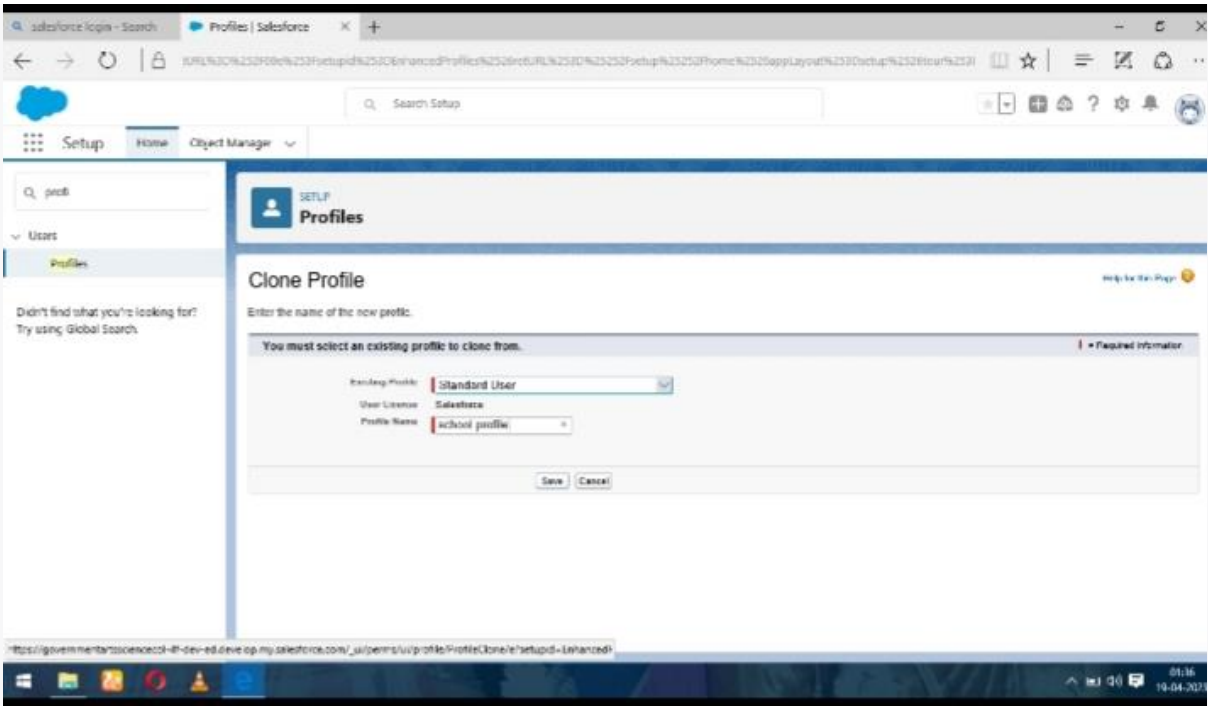
PARENT FIELD AND RELATIONSHIP



DISCRIPTION

The "Parent" field contains information related to the parents or guardians of the students, including their names, contact details, and any other relevant details. This field also includes information related to their relationship with the student, their involvement in the school, and any communications or interactions they have had with the school or faculty.

CREATE THE PROFILE

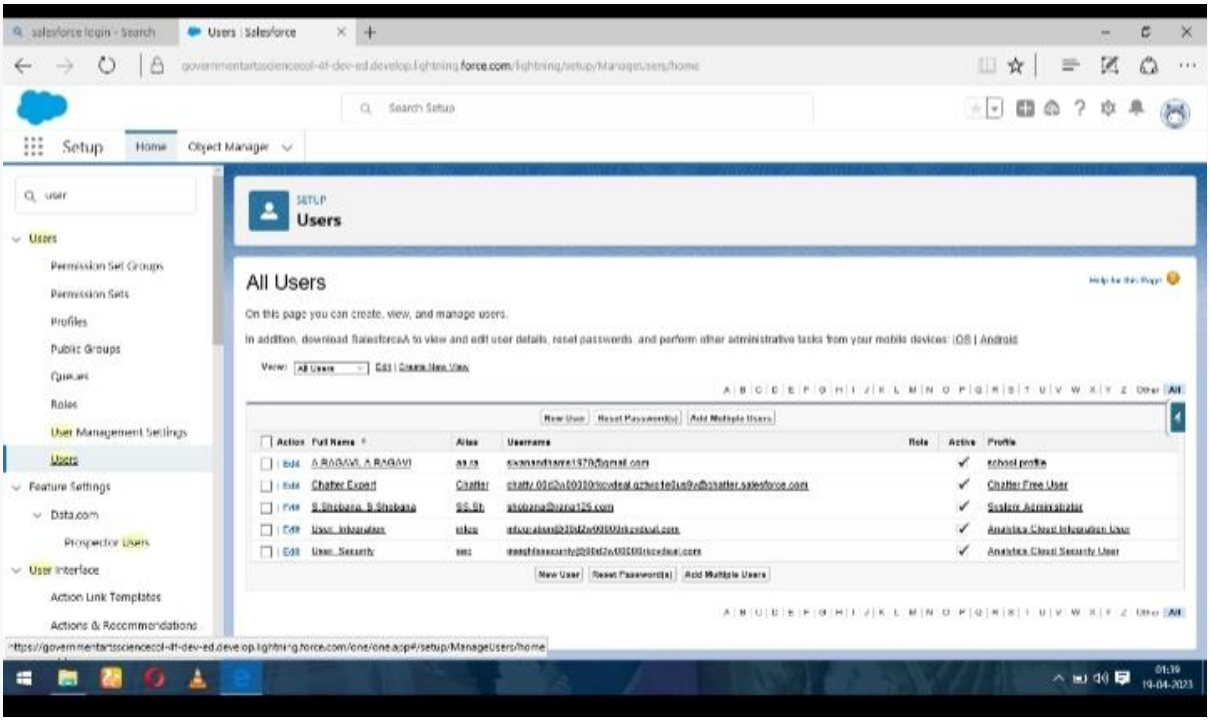


DISCRIPTION

The "Profile" tab in a CRM application for schools and colleges is a feature that allows users to create profiles for different rooms, classes, or groups within the institution. With this feature, users can easily switch between different profiles to view information and data specific to each group.

When creating a profile, users can specify the name of the group, the type of group (e.g. classroom, club, or team), and any additional details or notes. Users can also customize the profile settings, such as choosing the default view, setting up notifications, and selecting which data fields to display.

CREATE THE USER

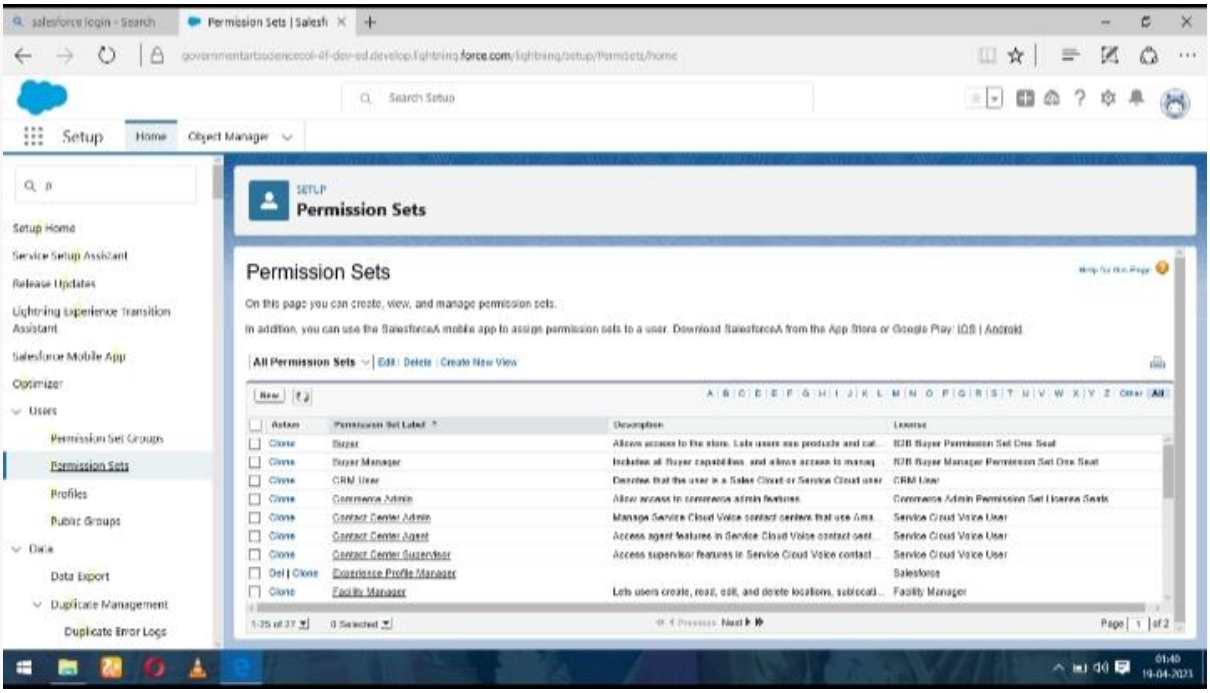


DISCRIPTION

The "User" tab in a CRM application for schools and colleges is a feature that allows administrators to manage the users who have access to the application. This tab is typically accessible only to users with administrative privileges.

The "User" tab displays a list of all the users who have access to the application, along with their login credentials, access level, and other relevant information. Administrators can add or remove users, edit user profiles, and manage user permissions from this tab.

PERMISSION SETS

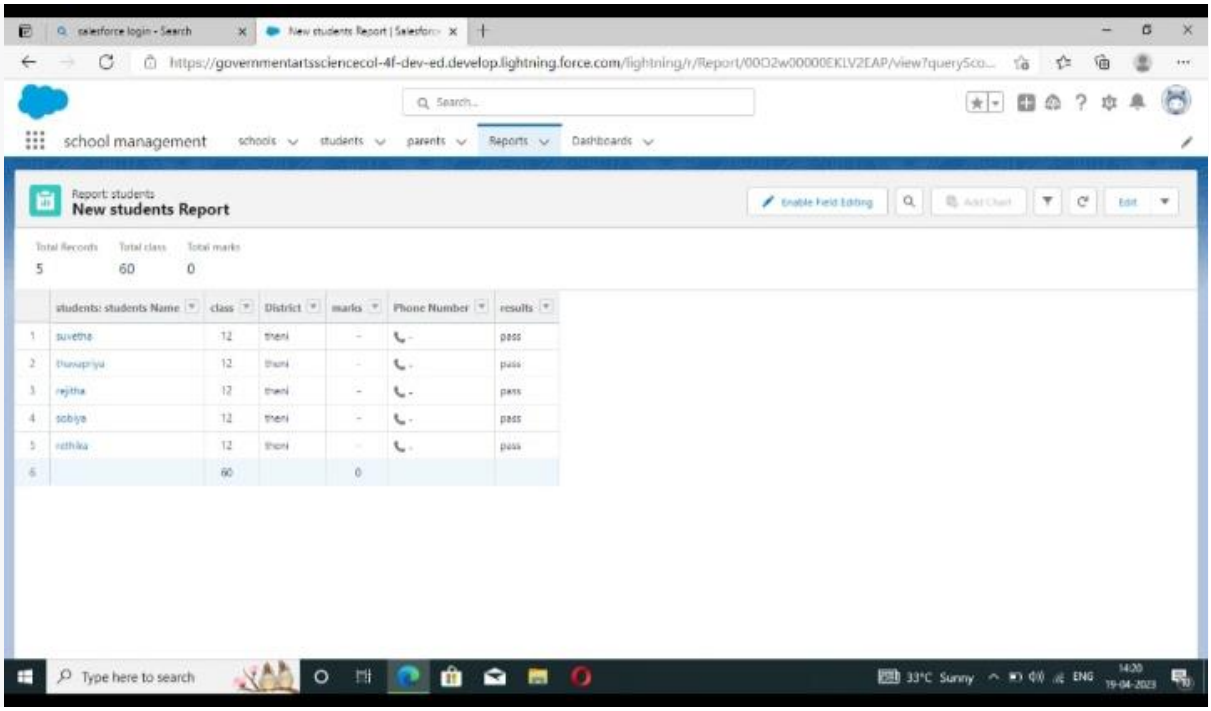


DISCRIPTION

The "Permission Sets" tab in a CRM application for schools and colleges is a feature that allows administrators to create and manage custom sets of permissions for different groups or roles within the institution. With this feature, administrators can fine-tune the access and capabilities of each user or group, ensuring that they have the appropriate level of access to the application's features and data.

The "Permission Sets" tab displays a list of all the available permission sets, along with their description and the roles or groups they are assigned to. Administrators can create new permission sets, edit existing ones, and assign them to specific roles or groups within the institution.

CREAE THE REPORTS



DISCRIPTION

The "Reports" tab in a CRM application for schools and colleges is a feature that allows users to generate and view various reports based on the data stored in the application. Reports provide users with insights into different aspects of the institution's performance, such as attendance, grades, enrollment, and communication history.

The "Reports" tab displays a list of all the available reports, along with their description and parameters. Users can generate new reports, modify existing ones, and view reports in various formats, such as tables, charts, or graphs.

4.TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER- https://trailblazer.me/id/mmthavapriya

TEAM MEMBER 1- https://trailblazer/id/sangr78

TEAM MEMBER 2- https://trailblazer/id/aaragavi

TEAM MEMBER 3- https://trailblazer/id/ssshobana

5.ADVANTAGES AND DISADVANTAGES

Advantages:

1. Improved organization: A CRM application can help schools and colleges to better organize and manage their data, such as student records, attendance, grades, and communication history.
2. Enhanced communication: A CRM application can help to improve communication between teachers, students, and parents by providing a centralized platform for messaging and collaboration.
3. Streamlined workflows: A CRM application can help to streamline workflows and optimize processes, such as enrollment, grading, and financial management, by automating routine tasks and providing real-time data insights.
4. Customizable features: A CRM application can be customized to suit the unique needs of each institution, such as by adding or removing features, or by creating custom reports and dashboards.
5. Increased data security: A CRM application can help to maintain data security and compliance by providing access controls, user permissions, and data backup and recovery capabilities.

Disadvantages:

1. Implementation costs: Implementing a CRM application can be costly, both in terms of software licensing fees and the resources required for training and support.
2. User adoption: A CRM application may face resistance from users who are accustomed to using traditional paper-based or manual systems, and who may be reluctant to adopt new technology.
3. Data quality issues: A CRM application is only as good as the data it contains, and data quality issues can arise if data is not entered correctly or updated regularly.
4. Technical difficulties: A CRM application may face technical difficulties, such as software glitches, system downtime, or compatibility issues with other applications.
5. Dependence on technology: A CRM application may create a dependence on technology, which can lead to disruptions if the

system fails or if users lack the necessary technical skills to use the system effectively.

6.APPLICATION

A CRM application for schools and colleges is a software system that is designed to help educational institutions manage their relationships with students, parents, staff, and other stakeholders. The application typically includes a range of features and functionalities, such as student data management, communication tools, financial management, and analytics and reporting capabilities.

Here are some key features that might be included in a CRM application for schools and colleges:

1. Student data management: This feature allows schools and colleges to manage student data, such as enrollment information, grades, attendance, and personal information. This feature may also include tools for tracking student progress, creating reports, and generating transcripts.
2. Communication tools: A CRM application may include communication tools such as email, SMS, and messaging systems, which enable teachers, staff, students, and parents to communicate with each other more effectively. The application may also include features for scheduling appointments and meetings.
3. Financial management: This feature enables schools and colleges to manage their finances, such as billing, payments, and financial aid. The application may also include tools for managing grants, donations, and fundraising campaigns.
4. Analytics and reporting: A CRM application may include analytics and reporting tools that enable schools and colleges to track key performance indicators, such as enrollment, attendance, and student retention. These tools may also include dashboards and reports that provide real-time insights into the performance of the institution.

5. Customization: A CRM application may be customizable to suit the unique needs of each institution. This may include features such as custom reports, workflows, and branding.
6. User management: A CRM application may include user management tools that enable administrators to manage user permissions, access controls, and other security features.

A CRM application for schools and colleges can help educational institutions to streamline their operations, improve communication, and enhance the student experience. By providing a centralized platform for managing student data, communication, finances, and analytics, a CRM application can help schools and colleges to improve their performance and achieve their educational goals.

7.CONCLUSION

In conclusion, a CRM application for schools and colleges can be an effective tool for managing relationships with students, parents, staff, and other stakeholders. By providing a centralized platform for managing student data, communication, finances, and analytics, a CRM application can help educational institutions to improve their operations and enhance the student experience. However, implementing a CRM application can also have its challenges, such as the costs associated with licensing, training, and user adoption. Therefore, educational institutions should carefully evaluate their needs and budget before deciding to implement a CRM application. With the right planning and implementation, a CRM application can be a powerful tool for helping schools and colleges to achieve their educational goals and better serve their students and stakeholders

8.FUTURE SCOPE

The future scope for a CRM application for schools and colleges is vast, and it is expected to evolve and improve with advancements in technology. Here are some potential future developments:

1. Artificial intelligence and machine learning: CRM applications for schools and colleges can leverage AI and machine learning to improve data analysis and prediction. For example, these technologies can be used to analyze student data to predict the likelihood of a student dropping out of school, which can help institutions take proactive measures to prevent dropout rates.
2. Virtual and augmented reality: Virtual and augmented reality technologies can be integrated into CRM applications for schools and colleges to enhance the learning experience. For example, these technologies can be used to create immersive virtual field trips or to provide interactive simulations for complex subjects.
3. Mobile-first approach: With the growing use of mobile devices, the future of CRM applications for schools and colleges will involve a mobile-first approach, where the application is designed primarily for use on mobile devices, making it more accessible and convenient for users.
4. Personalization: As data collection becomes more sophisticated, CRM applications for schools and colleges will be able to personalize the learning experience for each student based on their learning preferences, interests, and strengths.
5. Social media integration: CRM applications for schools and colleges can integrate social media platforms to enhance communication and engagement between students, parents, and staff.

Overall, the future of CRM applications for schools and colleges looks promising, with many exciting possibilities for innovation and improvement. As technology continues to evolve, educational institutions that adopt these advancements will be better equipped to provide a high-quality education and a positive student experience.