Project Report Template

1 INTRODUCTION

1.1 Overview

- CRM software manages all your institutions interactions with prospective and current students.
- It also supports managing communications with alumni,employees,, and other members of the education sector in your institution.
- CRM systems increases the number of leads coming in, helping your marketing team find new customers faster.

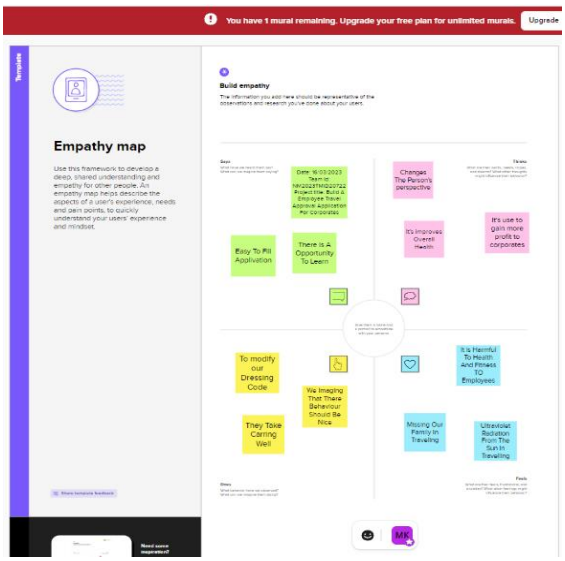
1.2 Purpose

CRM for educational institutions

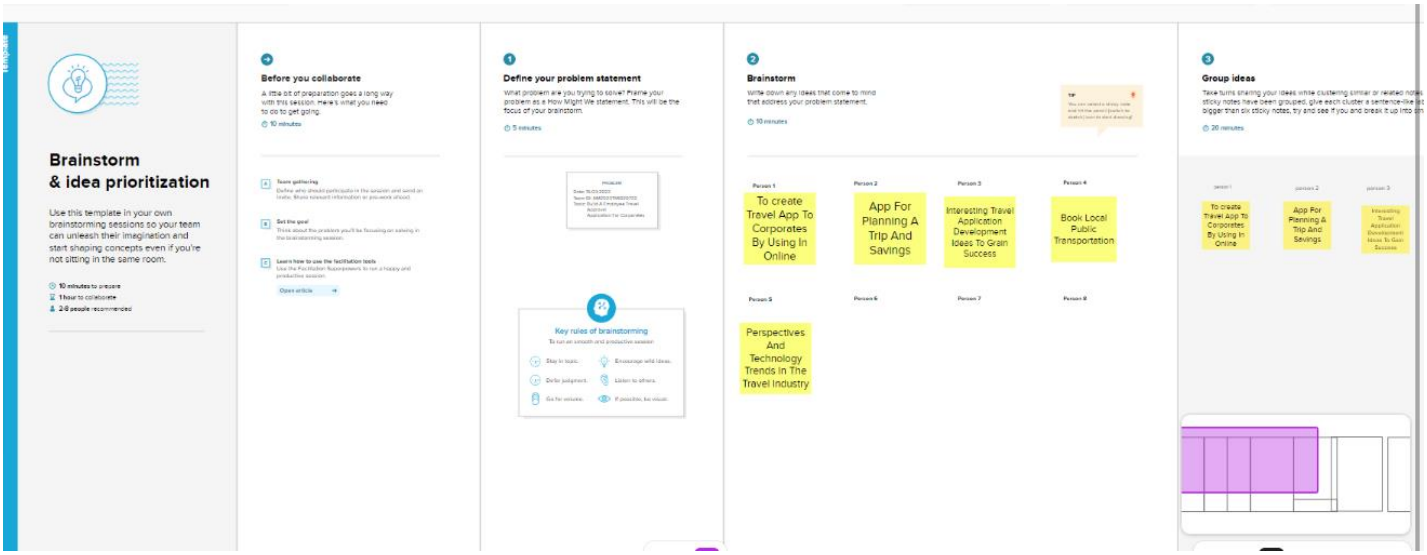
- It is easier to make follow up for all inquiries
- Keeping proper record of the interactions with student during councelling process.
- Centralised database of information
- Managed communications with prospective leads

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 & Ideation Brainstorming Map



3 Result

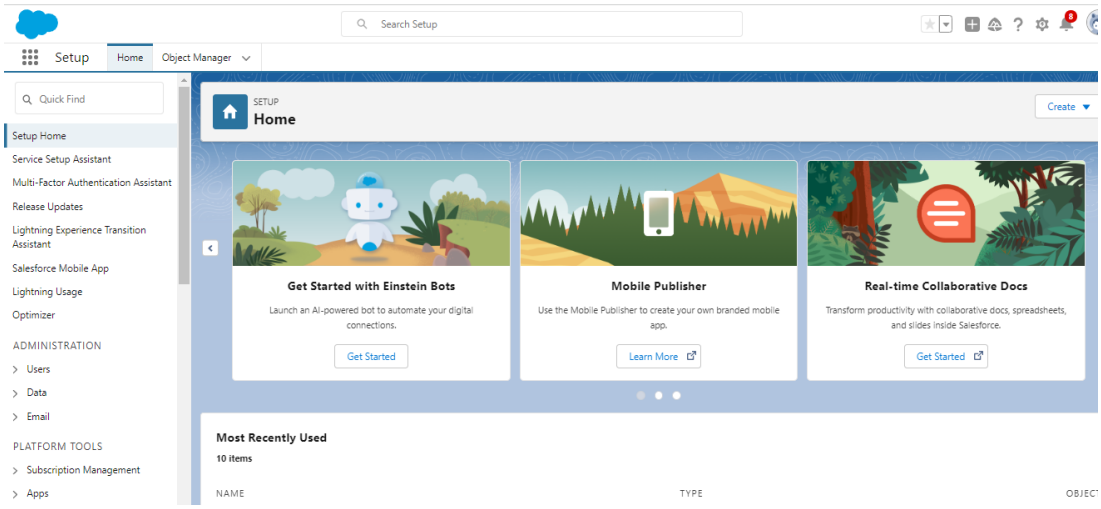
3.1 Data Model:

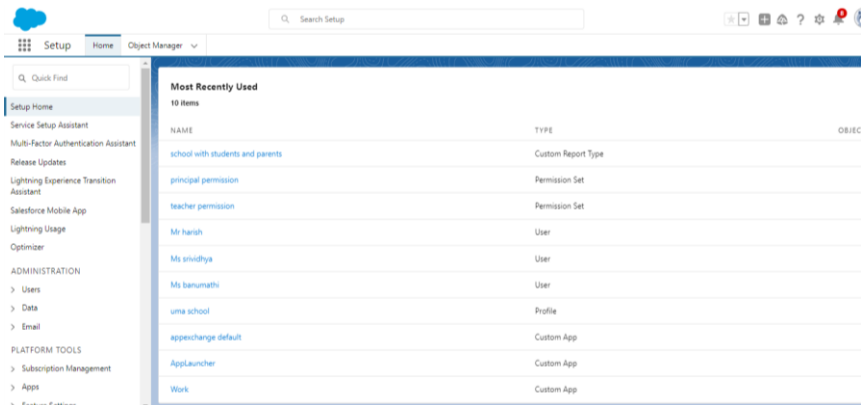
Object name	Fields in the Object
School	Field label: Date type Address: Text area Phone number: phone Number of students: Master- Detail relationship Highest Marks: Master-Detail relationship
Student	Field label: Data type Phone number: Phone School: Master-Detail relationship Results: Picklist Class: Number

Object name	Fields in the Object

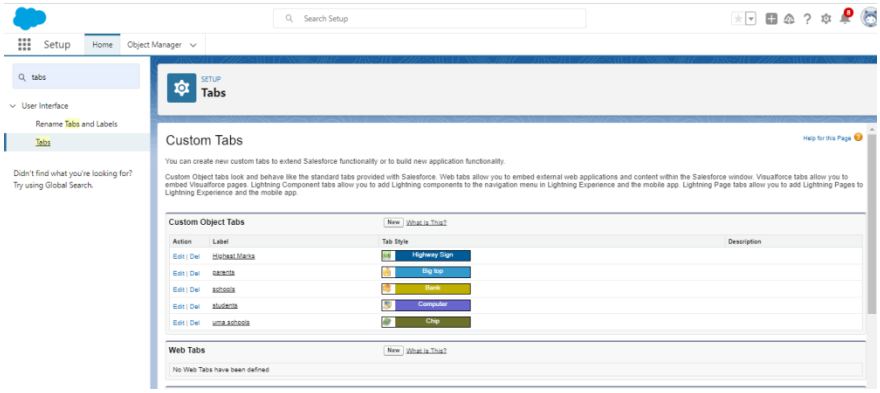
Parent	<table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Parent Address</td><td>Text area</td></tr><tr><td>Phone number</td><td>Phone</td></tr></table>

3.2 Activity & Screenshot

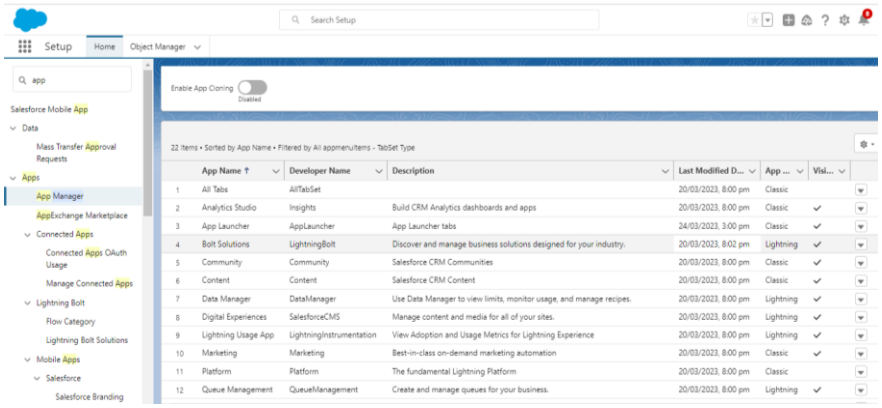




MILESTONE - 2

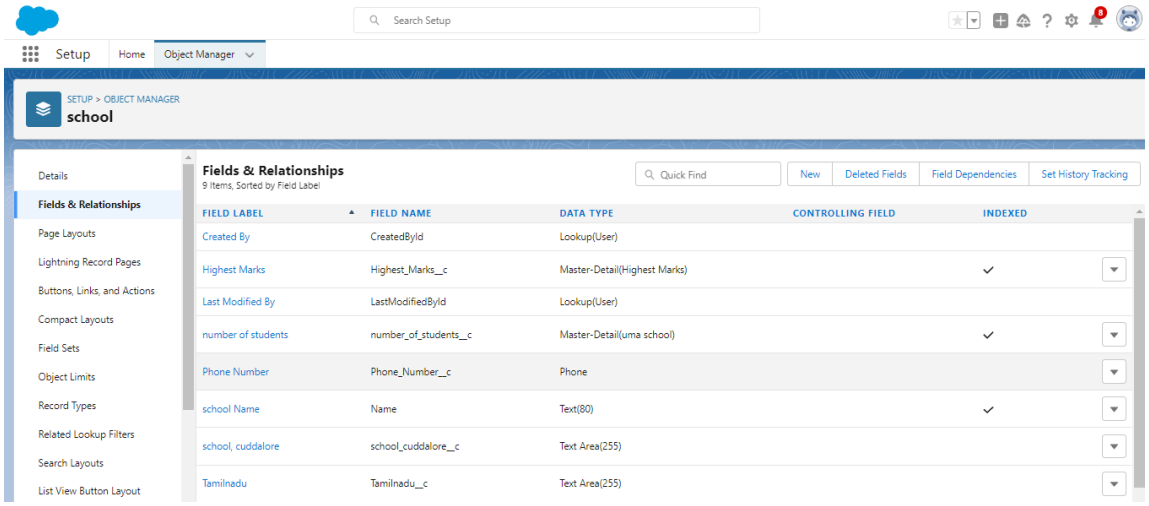

Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom 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.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Highest Marks
Highway Sign
Edit | Del
parents
Big top
Edit | Del
schools
Bank
Edit | Del
students
Computer
Edit | Del
vma schools
Chip
Web Tabs
New
What Is This?
No Web Tabs have been defined

MILESTONE -3

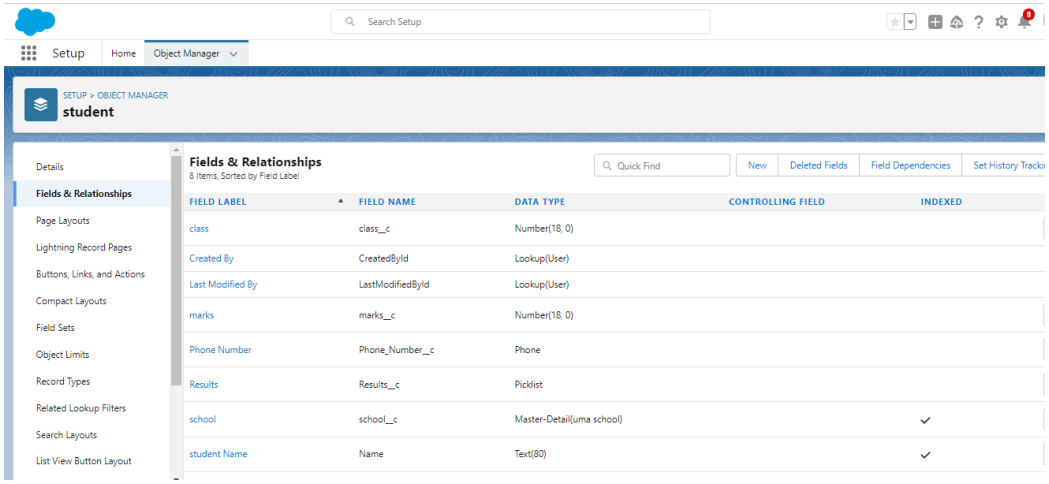

Search Setup
Setup
Home
Object Manager
app
Salesforce Mobile App
Data
Mass Transfer Approval Requests
Apps
App Manager
AppExchange Marketplace
Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps
Lightning Bolt
Flow Category
Lightning Bolt Solutions
Mobile Apps
Salesforce
Salesforce Branding
Enable App Cloning
Disabled
22 Items • Sorted by App Name • Filtered by All appmenuItems - TabSet Type
App Name
Developer Name
Description
Last Modified D...
App ...
Visi...
1 All Tabs AllTabSet 20/03/2023, 8:00 pm Classic
2 Analytics Studio Insights Build CRM Analytics dashboards and apps 20/03/2023, 8:00 pm Classic
3 App Launcher AppLauncher App Launcher tabs 24/03/2023, 3:00 pm Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your industry. 20/03/2023, 8:02 pm Lightning
5 Community Community Salesforce CRM Communities 20/03/2023, 8:00 pm Classic
6 Content Content Salesforce CRM Content 20/03/2023, 8:00 pm Classic
7 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage recipes. 20/03/2023, 8:00 pm Lightning
8 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 20/03/2023, 8:00 pm Lightning
9 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 20/03/2023, 8:00 pm Lightning
10 Marketing Marketing Best-in-class on-demand marketing automation 20/03/2023, 8:00 pm Classic
11 Platform Platform The fundamental Lightning Platform 20/03/2023, 8:00 pm Classic
12 Queue Management QueueManagement Create and manage queues for your business. 20/03/2023, 8:00 pm Lightning

MILESTONE -4

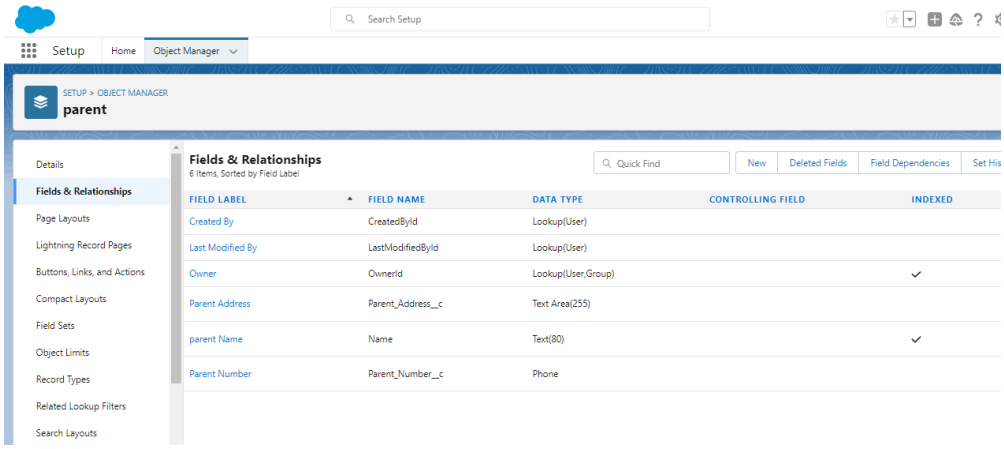
ACTIVITY-1



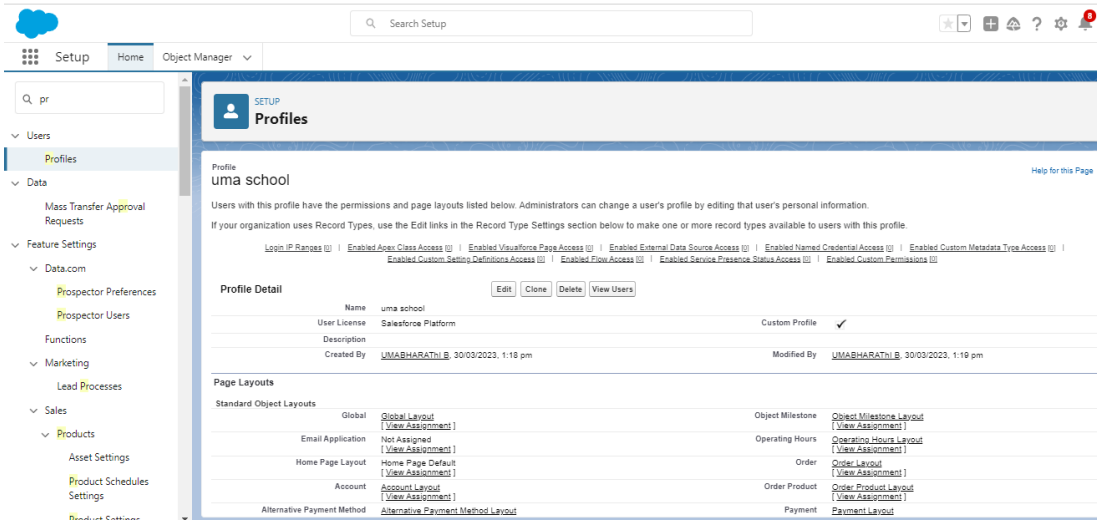
ACTIVITY-2



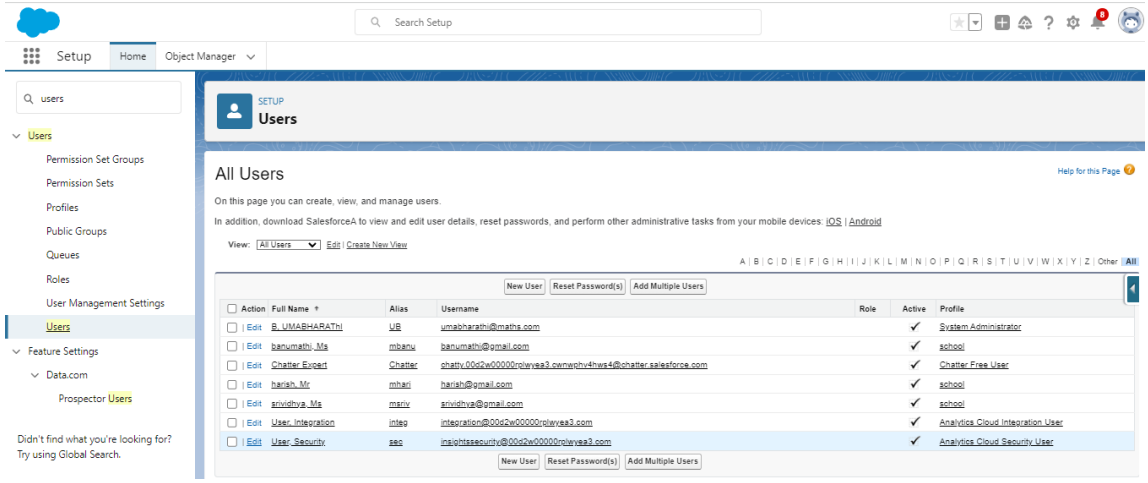
ACTIVITY-3



MILESTONE -5

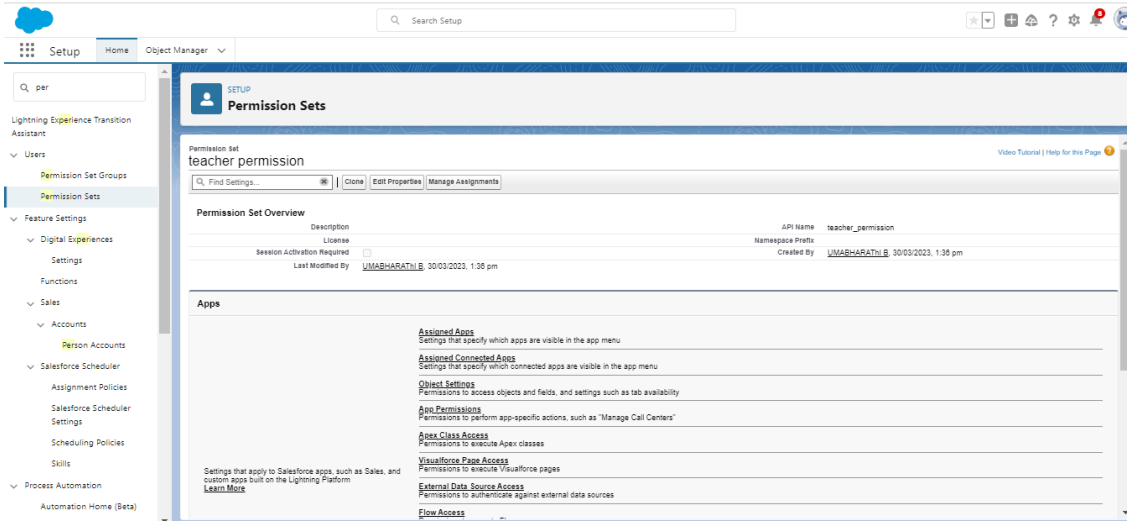


MILESTONE -6

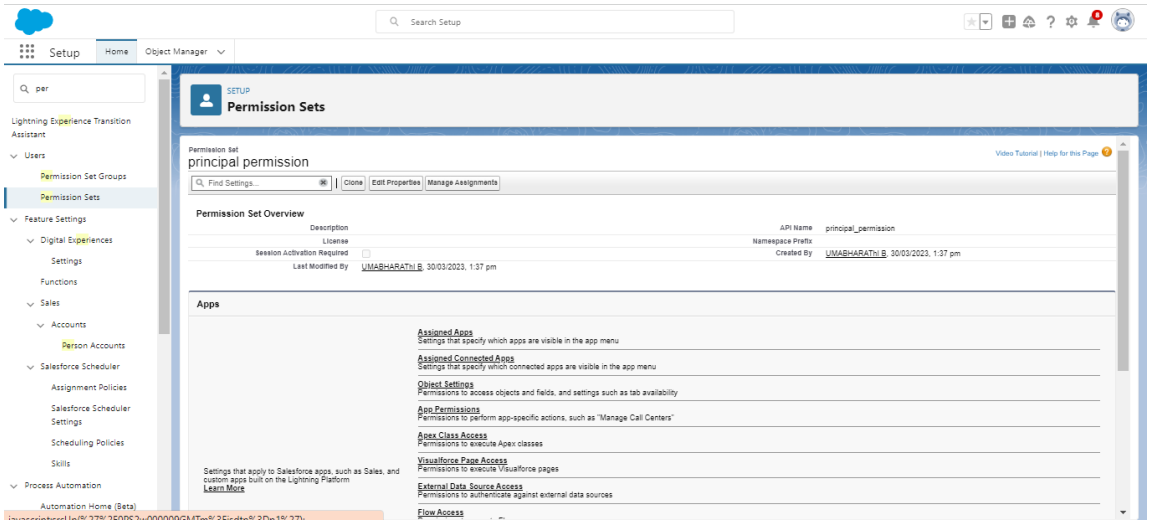


MILESTONE -7

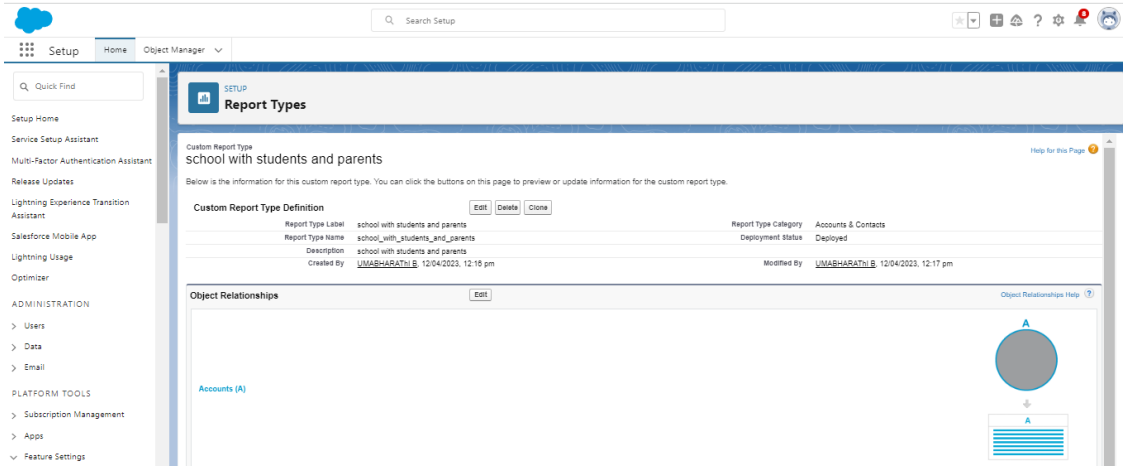
ACTIVITY-1



ACTIVITY-2


Search Setup
Setup
Home
Object Manager
per
Lightning Experience Transition Assistant
Users
Permission Set Groups
Permission Sets
Feature Settings
Digital Experiences
Settings
Functions
Sales
Accounts
Person Accounts
Salesforce Scheduler
Assignment Policies
Salesforce Scheduler Settings
Scheduling Policies
Skills
Process Automation
Automation Home (Beta)
SETUP
Permission Sets
Permission Set
principal permission
Video Tutorial | Help for this Page
Find Settings...
Clone
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
UMABHARATHI B, 30/03/2023, 1:37 pm
API Name
principal_permission
Namespace Prefix
Created By
UMABHARATHI B, 30/03/2023, 1:37 pm
Apps
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
Learn More
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

MILESTONE -8


Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
SETUP
Report Types
Custom Report Type
school with students and parents
Help for this Page
Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.
Custom Report Type Definition
Edit
Delete
Clone
Report Type Label
school with students and parents
Report Type Name
school_with_students_and_parents
Description
school with students and parents
Created By
UMABHARATHI B, 12/04/2023, 12:16 pm
Report Type Category
Accounts & Contacts
Deployment Status
Deployed
Modified By
UMABHARATHI B, 12/04/2023, 12:17 pm
Object Relationships
Edit
Object Relationships Help
Accounts (A)
A
A

Trailhead profile Public URL

Team Lead : UMABHARATHI B
https://trailblazer.me/id/ubharathi5
Team Member 1: VAISHNAVI P
https://trailblazer.me/id/vvaishanvi29
Team Member 2: VIJIPRIYA I
https://trailblazer.me/id/v1617
Team Member 3: VEERAMANI V
https://trailblazer.me/id/veera12
Team Member 4 : THAMIZHARASAN T
https://trailblazer.me/id/ttamil28
Team Member 5 : THANGAMANI S
https://trailblazer.me/id/tmani80

4 ADVANTAGES & DISADVANTAGES CRM APPLICATION FOR SCHOOLS & COLLEGES

Advantages

- One of the main benefits of using CRM in education is that automation and standardized online learning processes reduce costs by eliminating a lot of routine and manual steps.

- With the help of CRM for university technologies, you can get data on the effectiveness of each of your teachers and students.

- Integration of CRM systems for school with telephony, social networks, SMS notification, e-mail, different payment systems provides businesses with new opportunities to improve the efficiency of work with teachers and students in online colleges.

Disadvantages

- Staff over-reliance on CRM may diminish customer loyalty through a bad experience.

- It may not suit every business.

5 APPLICATIONS

- By intelligently storing and managing your customers information.

- A CRM system increases the number of leads coming.

- Helping your marketing team find new customers faster.

6 CONCLUSION

In this project, CRM enables a school to align its strategy with the needs of the student in order to best meet those needs and thus ensure student loyalty.

7 FUTURE SCOPE

- CRM is one of the world's fastest-growing industries, expected to grow at a rate of 14% between 2021 and 2027.
- CRM for educational institutions is essential for the successful functioning of the organization.