Smart Internz

A CRM Application for Schools & Colleges

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Team ID	NM2023TMID16767
Project Name	A CRM Application for Schools & Colleges
Team Lead	M.Vasanthakumar
Team Members	S.Ganesamoorthy
	M..Santhosh
	M.Pradeep
	M.Muthukavi

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A CRM Application for Schools & Colleges

1. INTRODUCTION

1.1 Overview

CRM stands for customer relationship management. It helps schools and educational institutions automate admission processes and manage communication with students and parents.

Image result for what is CRM application for school and college

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 time.

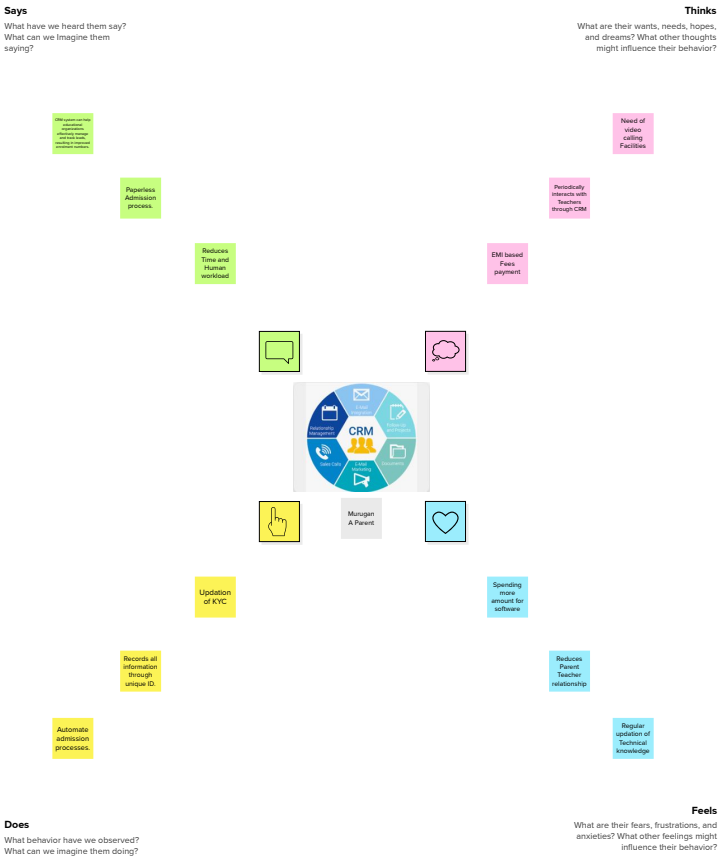
1.2 Purpose

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 time.

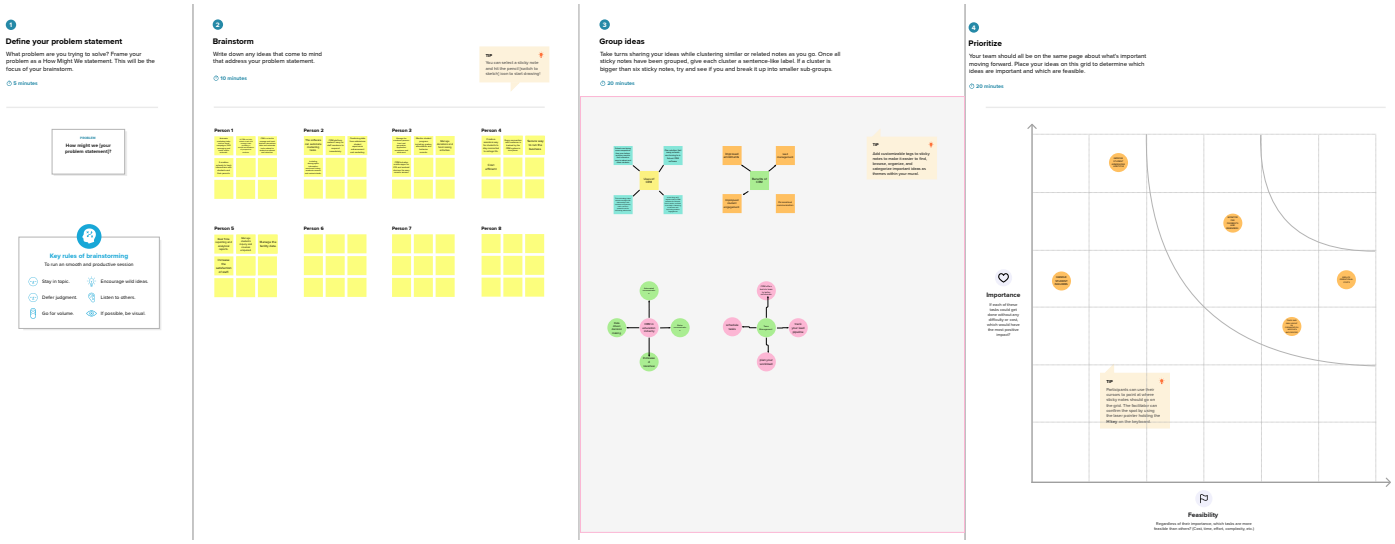
The most essential thing is to select a platform that your team will really utilize and that will help you achieve your goals. Try to avoid using new tools when getting started by choosing a CRM that works well with the existing software and digital platforms your company uses.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3. RESULT

3.1 Data Model:

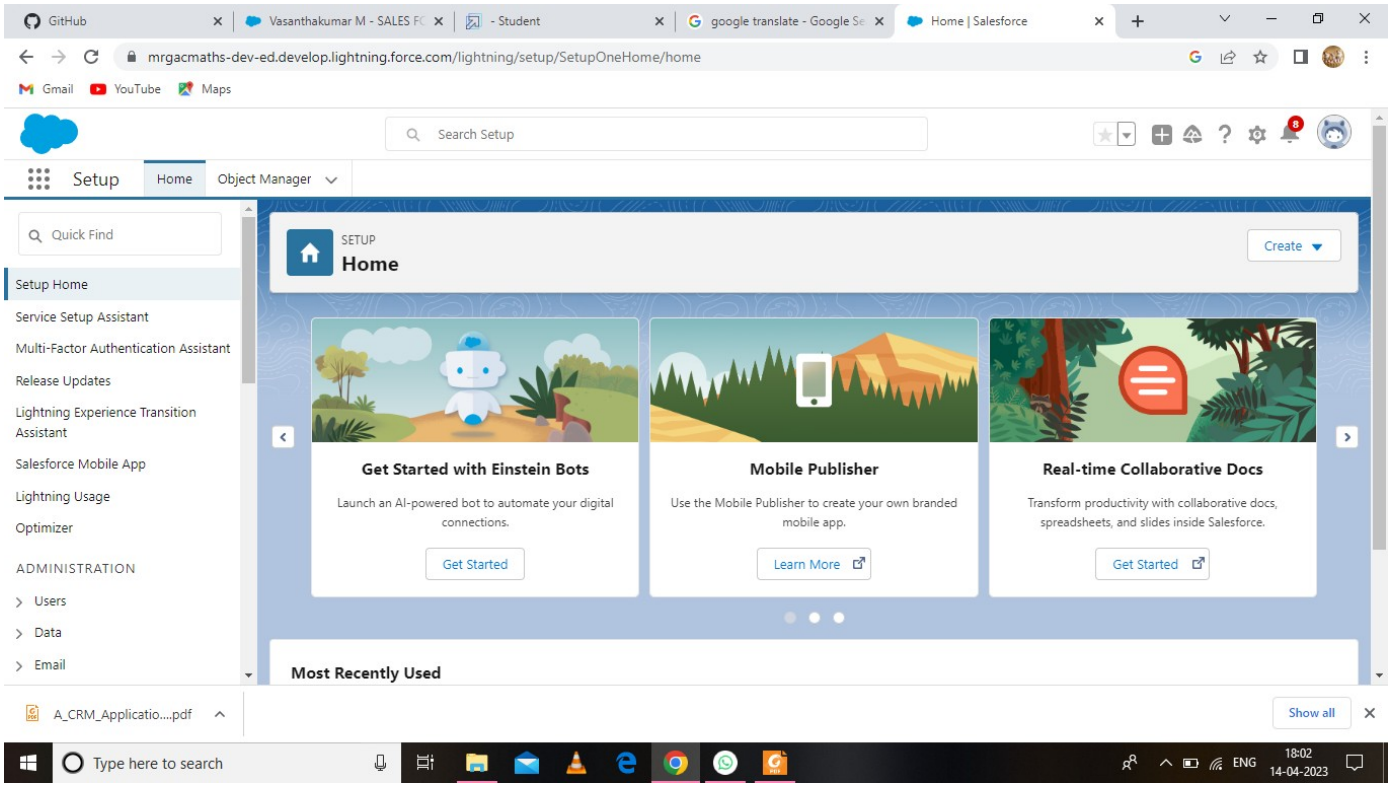
Object Name	Fields in the Object
School.	

Field Label	Data Type
Address	Text Area
District,State	Text Area
School websites	Text Area
Phone Number	Phone
Number of students	Roll-up summary
Highest Marks	Roll-up summary

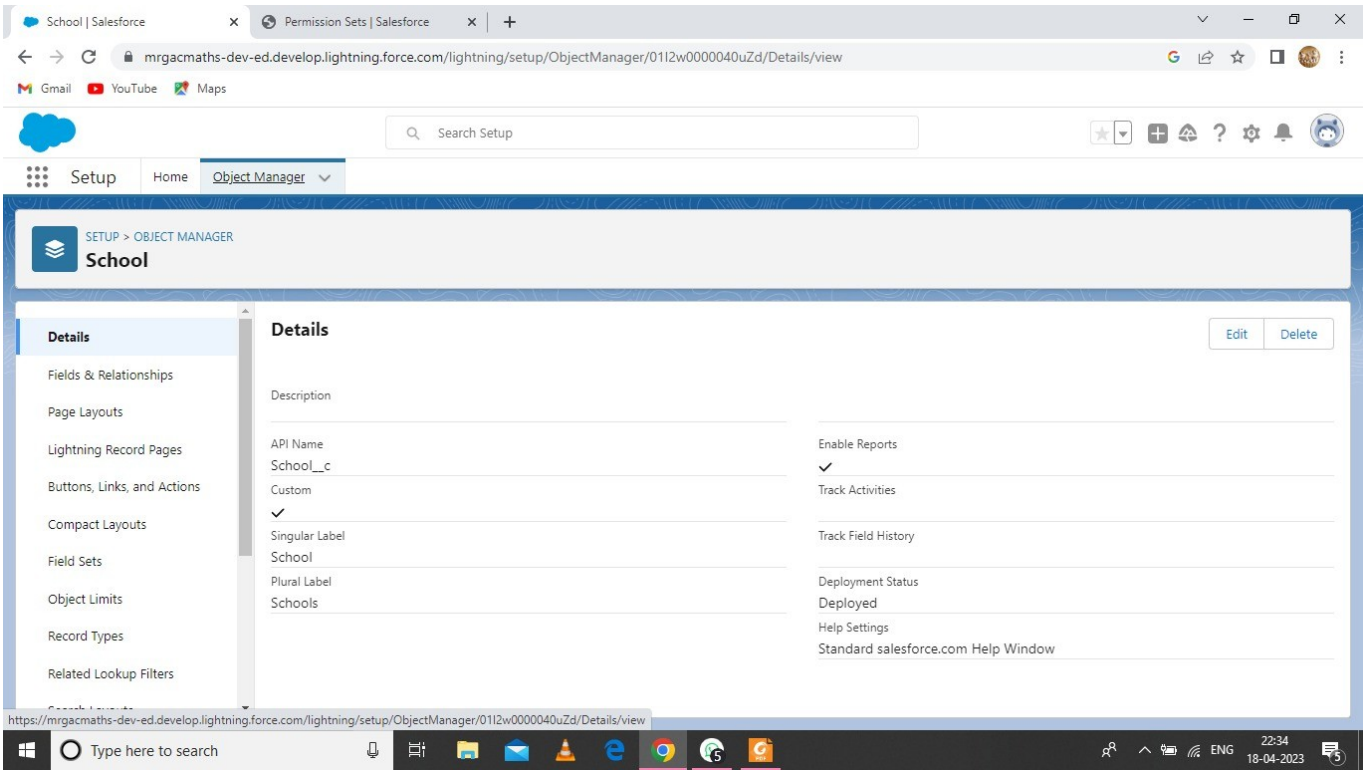
<table>
<tr><th>Object Name</th><th>Fields in the Object</th></tr>
<tr><td>Students</td><td>
<table>
<tr><th>Field Label</th><th>Data Type</th></tr>
<tr><td>Phone Number</td><td>Phone</td></tr>
<tr><td>School</td><td>Master-Detail Relationship</td></tr>
<tr><td>Results
i) Pass
ii) Fail</td><td>Pick-List</td></tr>
<tr><td>Class</td><td>Number</td></tr>
<tr><td>Marks</td><td>Number</td></tr>
</table>
</td></tr>
<tr><td>Parent</td><td>
<table>
<tr><th>Field Label</th><th>Data Type</th></tr>
<tr><td>Parent Address</td><td>Text Area</td></tr>
<tr><td>Parent Number</td><td>Phone</td></tr>
</table>
</td></tr>
</table>

3.2 Activity & Screenshot

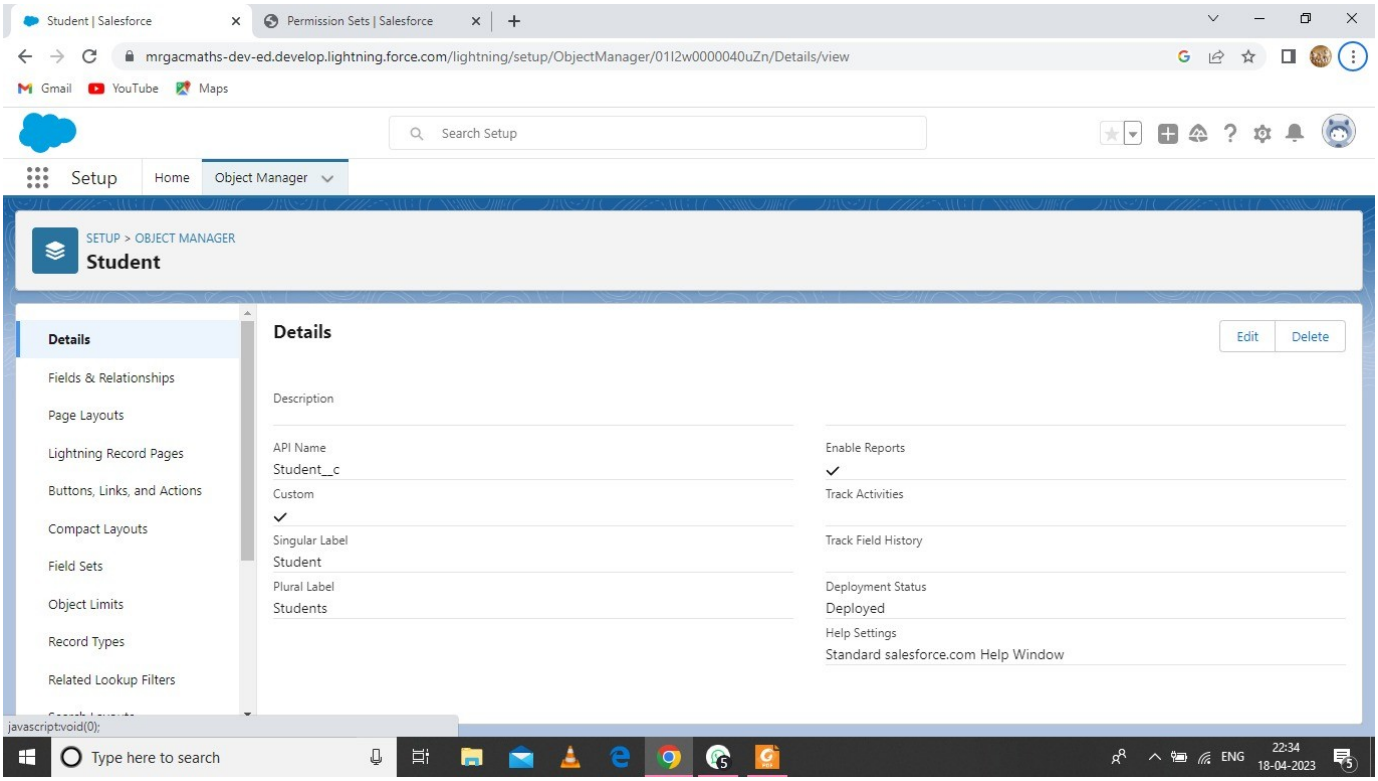
Milestone 1: Creation of Salesforce Account



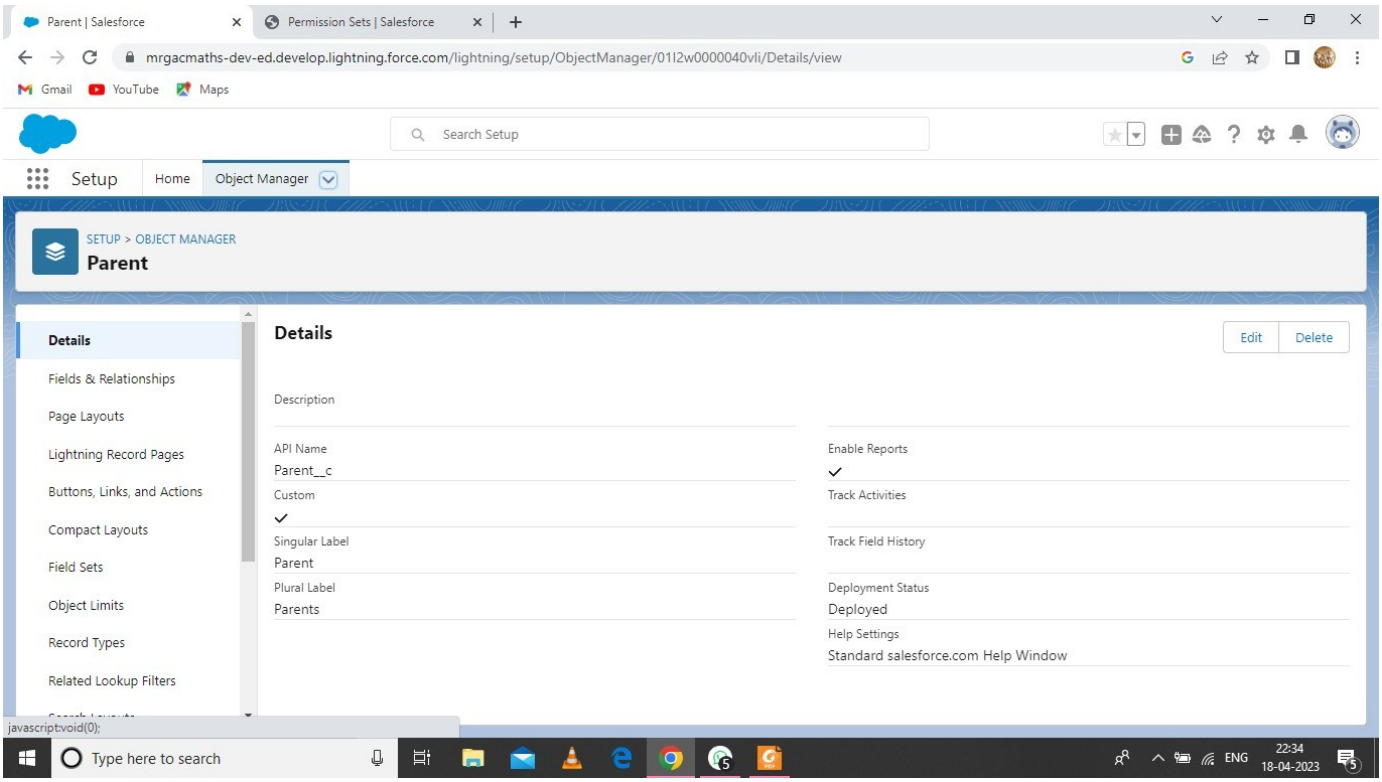
Milestone 2: Creating ‘School’ Object



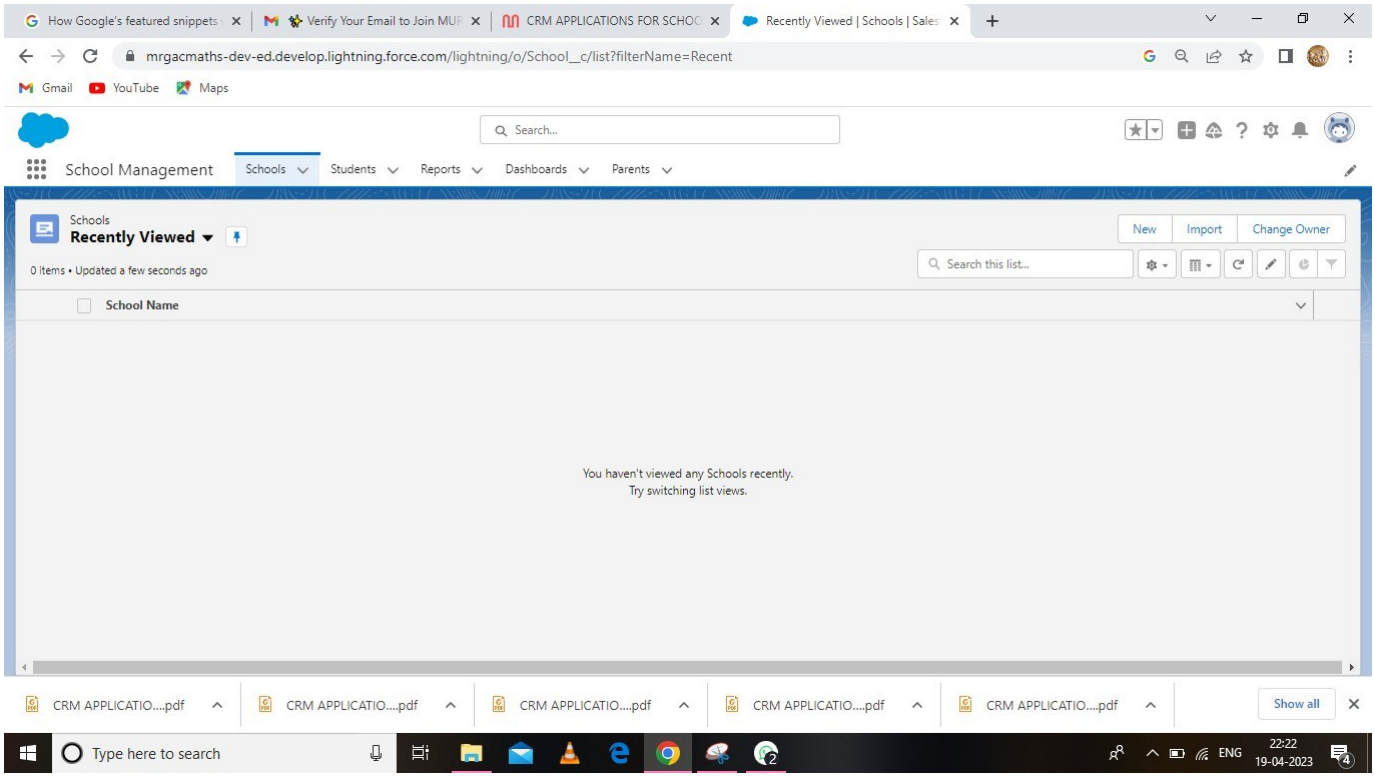
Creating ‘Student’ Object



Creating ‘ Parent’ Object

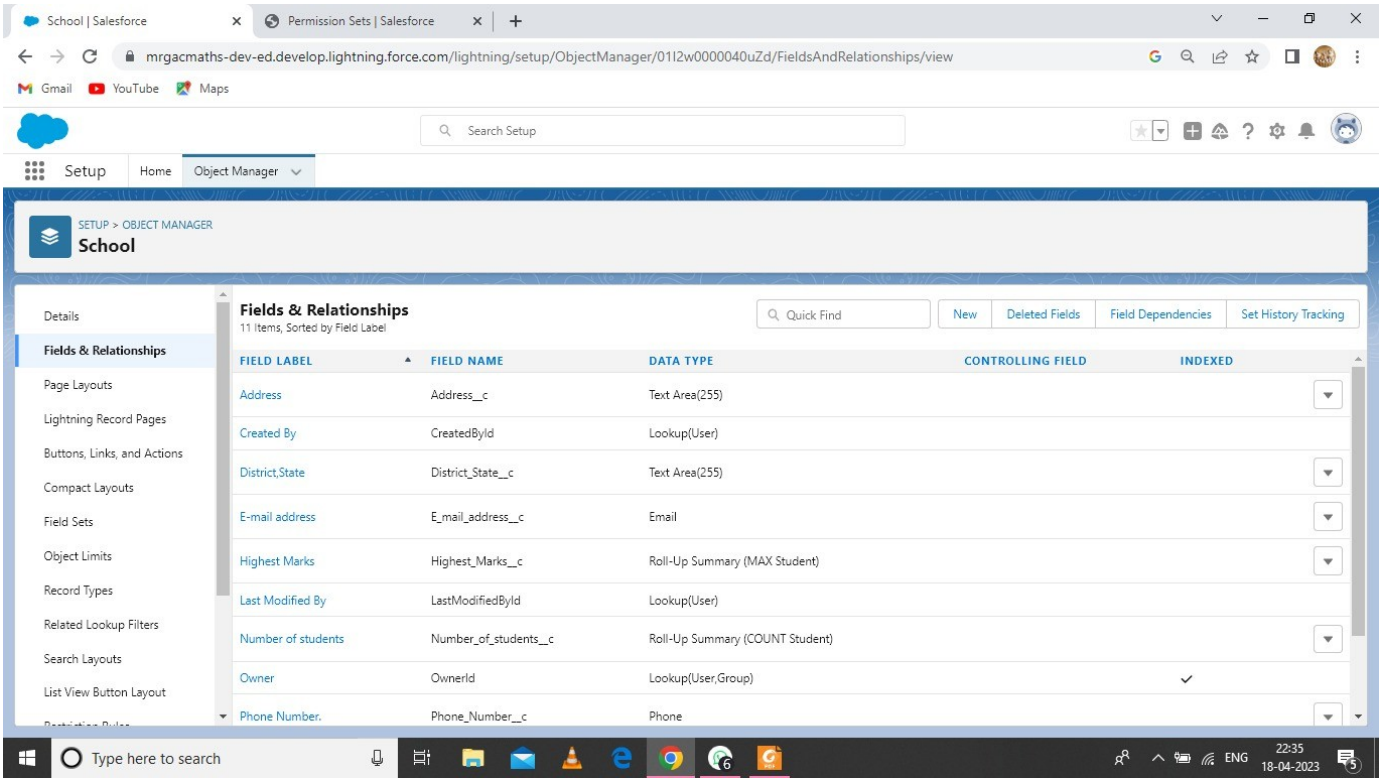


Milestone-3:Creating ‘School Management’ Lightning App

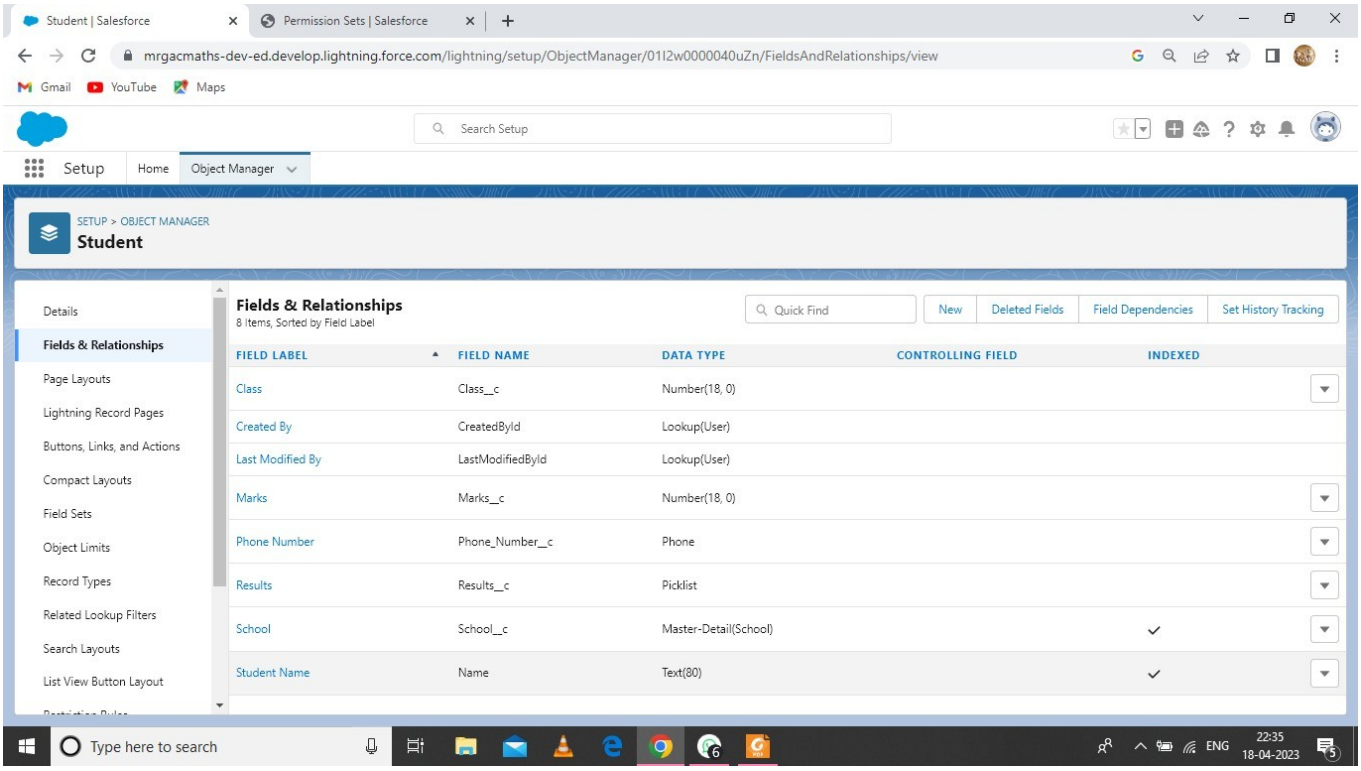


Milestone -4:Fields and Relationship

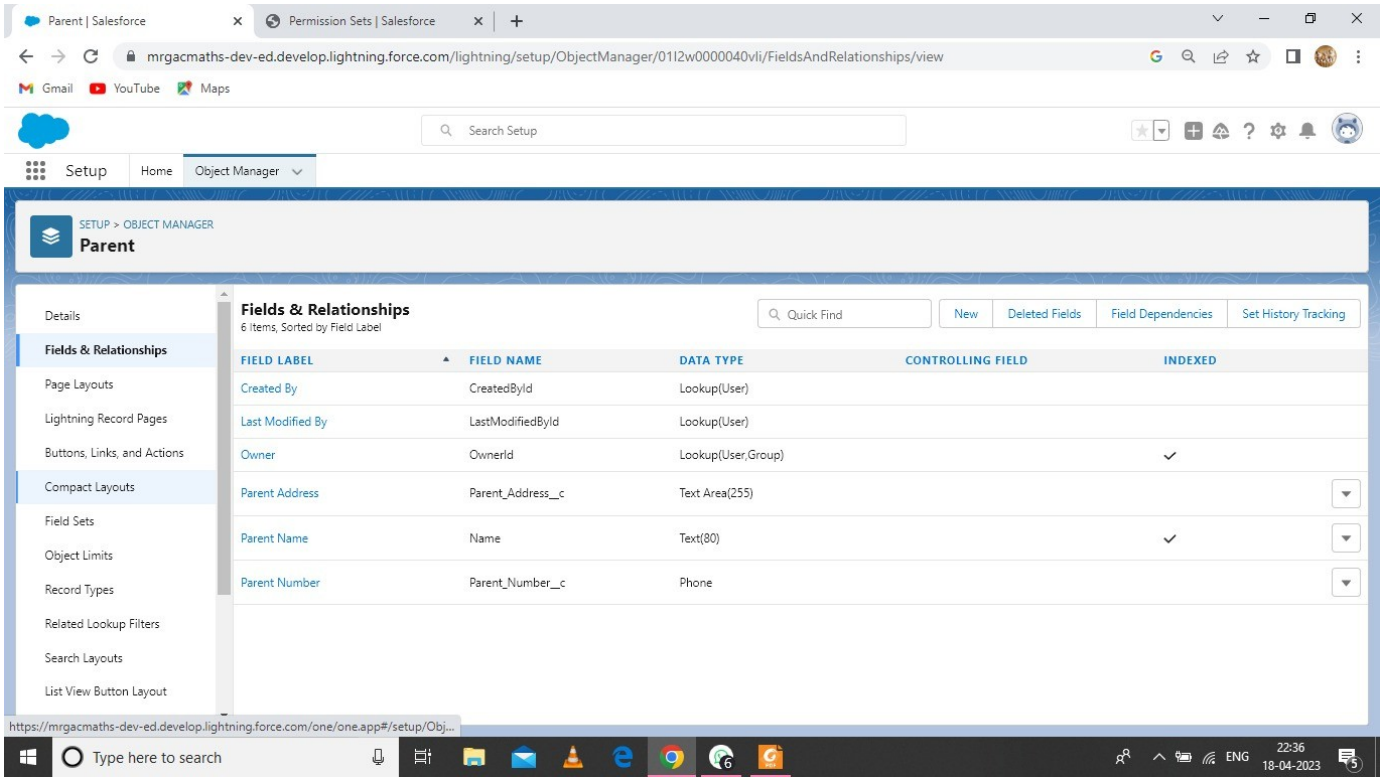
Creating of fields for the School object



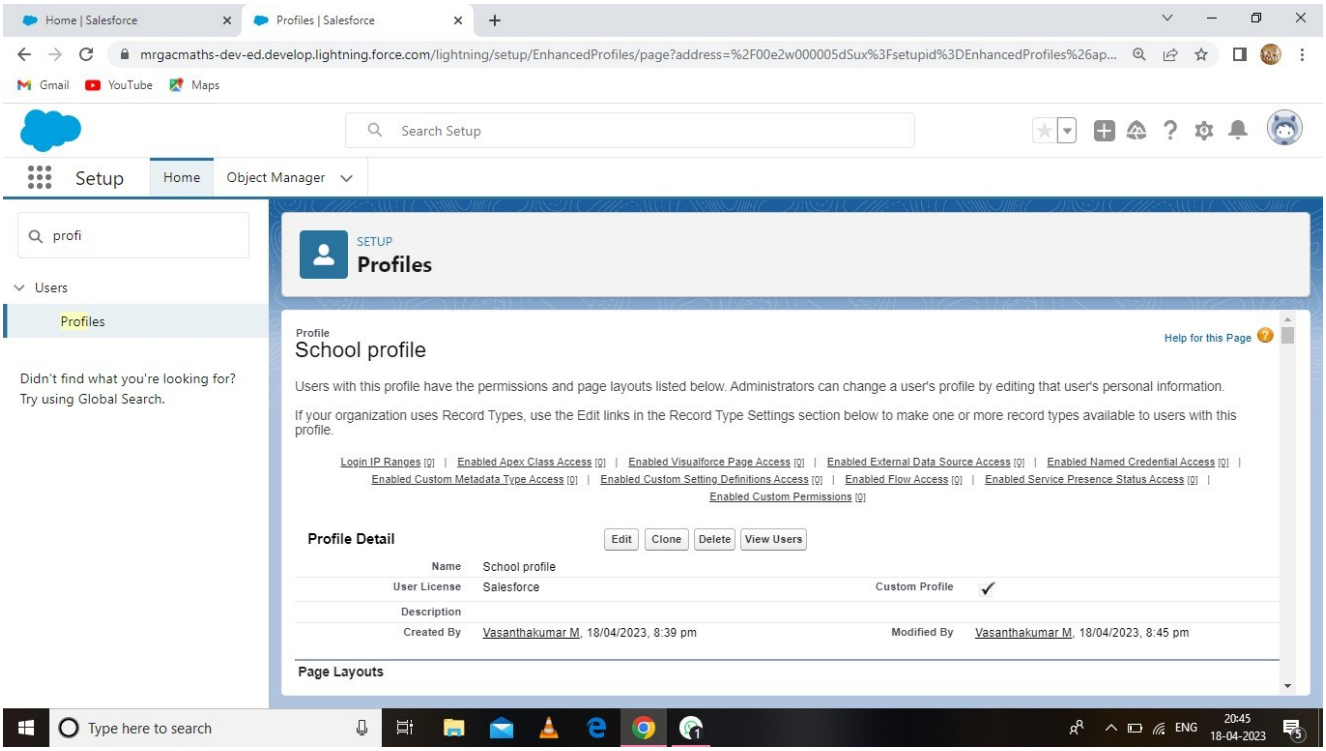
Creation of fields for the Student objects



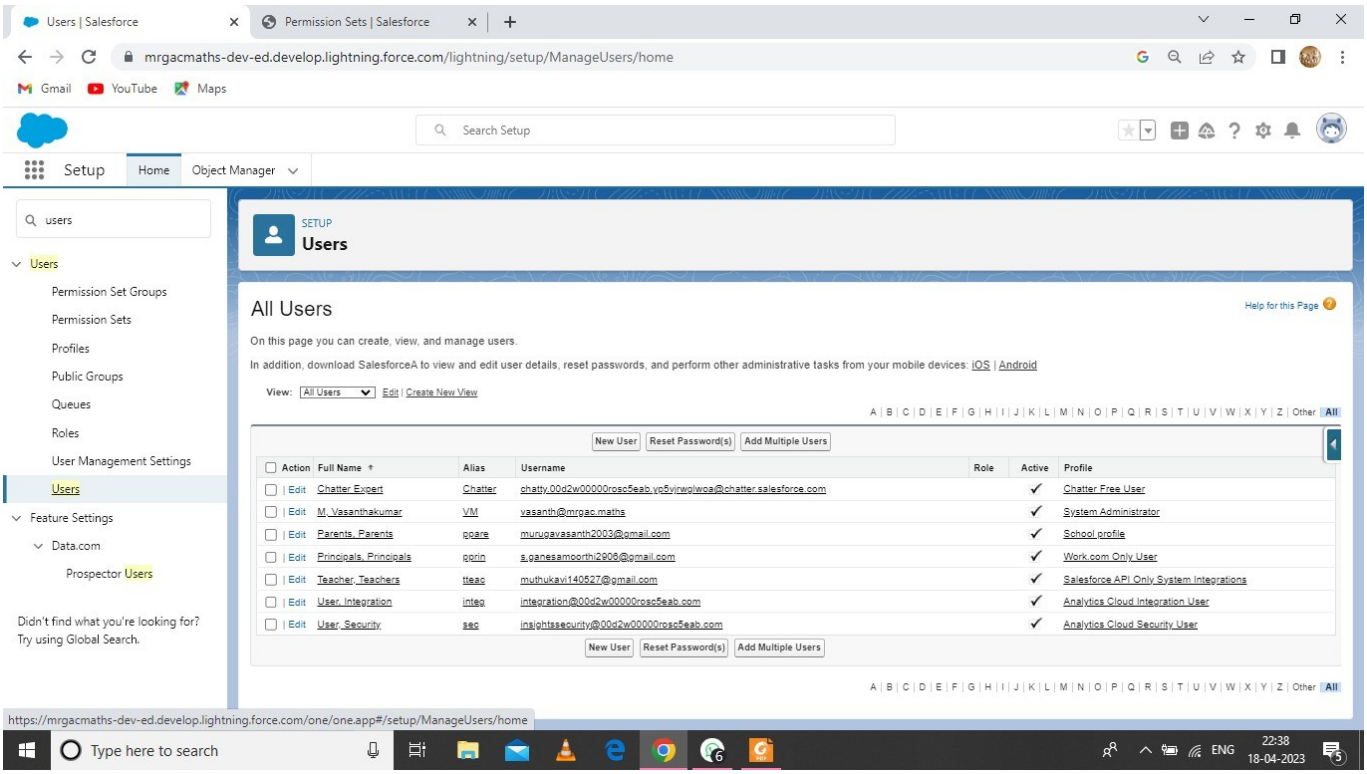
Creation of fields for the Parent objects



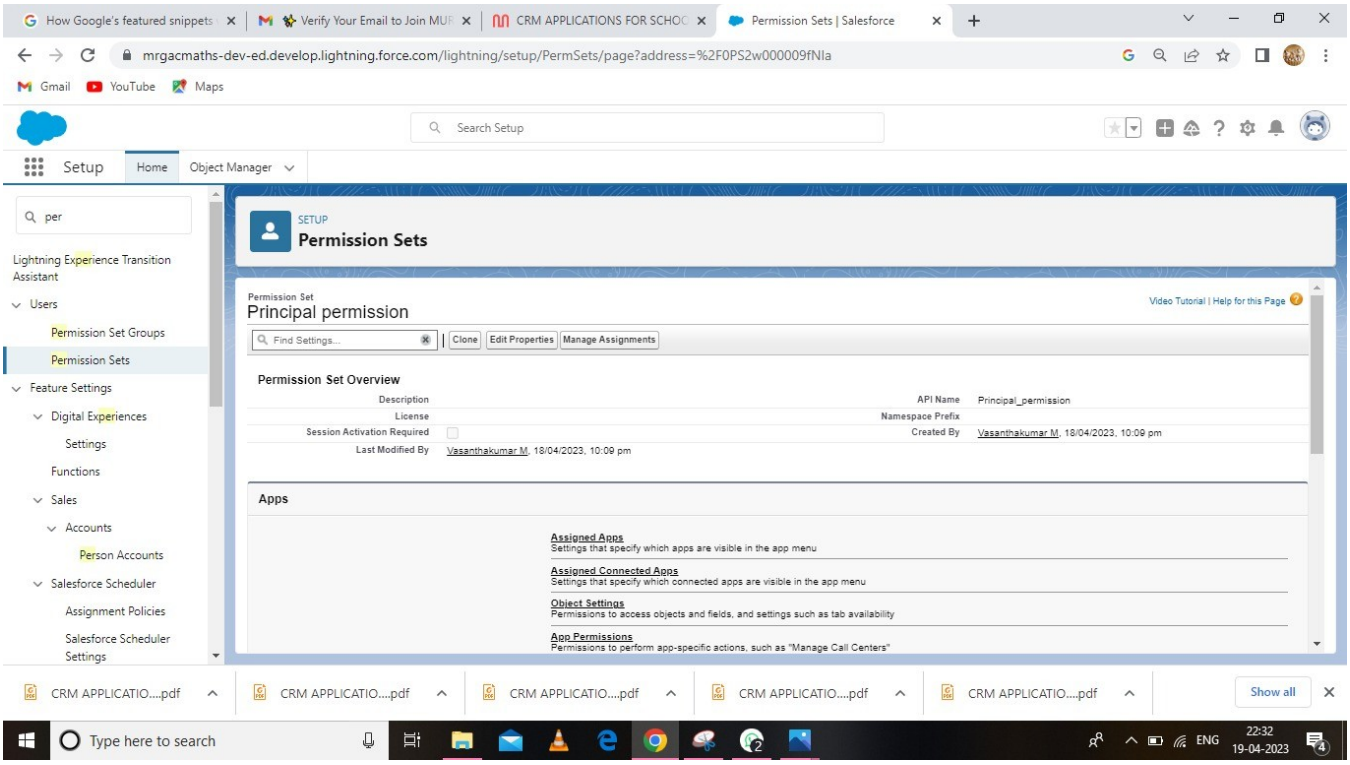
Milestone-5: Creating’ School profile.’ Profile

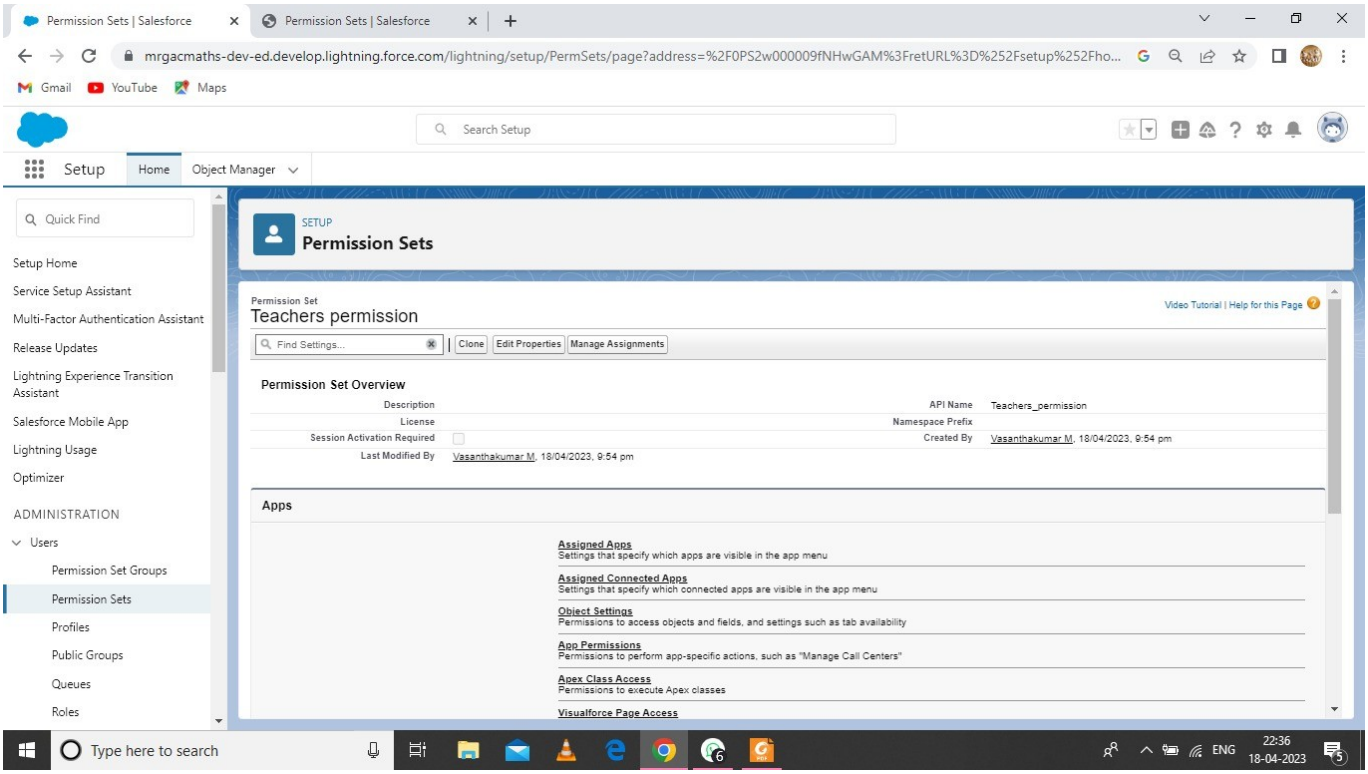


Milestone-6: Creating Users

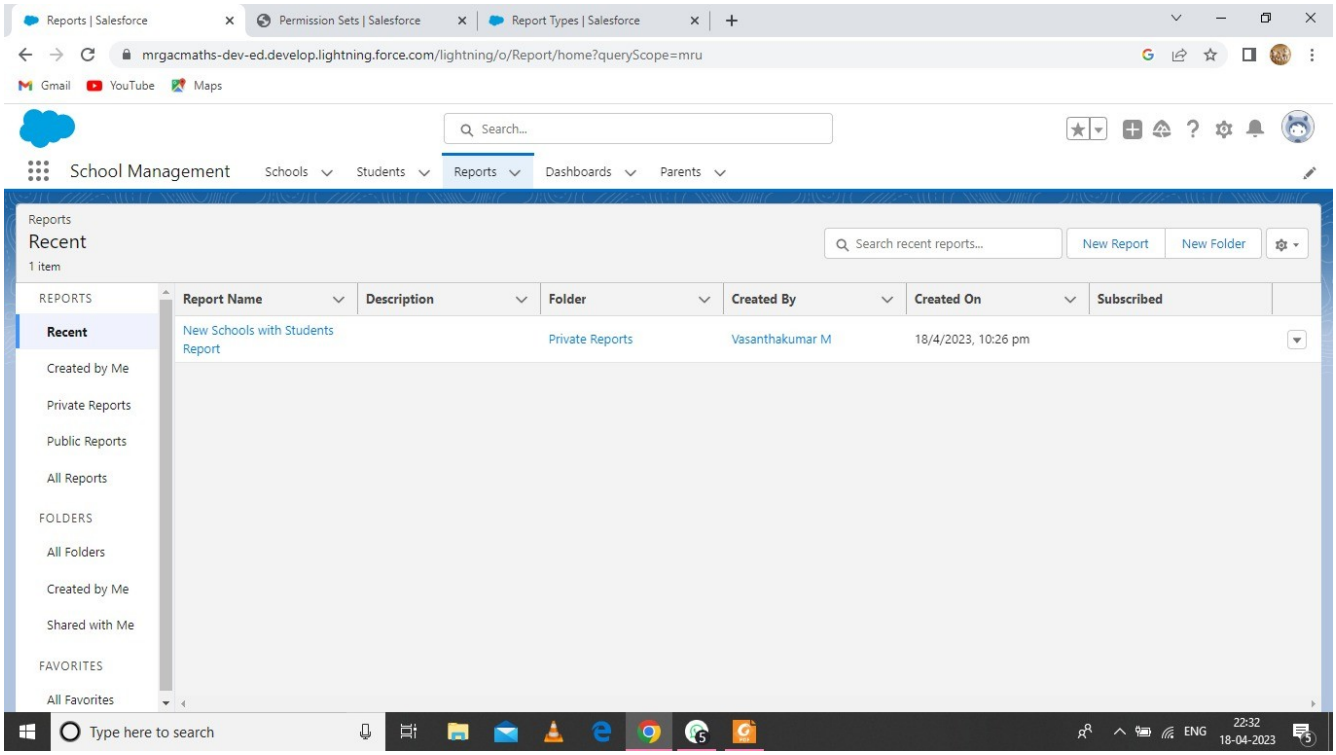


Milestone-7:Creating Permission sets





Milestone-8:Creating Reports



4. Trailhead Profile Public URL

Team Lead – Vasanthakumar.M
https://trailblazer.me/id/vasanthm21

Team Member 1- Ganesamoorthi.S
https://trailblazer.me/id/ganesamoorthi

Team Member 2-Pradeep.M
https://trailblazer.me/id/pradeepmnp

Team Member 3 –Santhosh.M
https://trailblazer.me/id/santhoshvb

Team Member 4- Muthukavi.M
https://trailblazer.me/id/mkavim

5. ADVANTAGES & DISADVANTAGE

Advantages:

1. An efficient dashboard streamlines sales activities
2. Potential to add revenue
3. Allows for easier collaboration
4. Enables automation of repetitive tasks

Disanvantages:

1. Dependent on proper setup
2. Focused on the wrong person
3. Can be costly
4. A waste of time if used incorrectly

6. APPLICATIONS

1.*Student Data Management:* A CRM system can be used to store and manage student data, such as personal information, academic records, attendance records, and behavioral information.

2.*Enrollment and Admissions Management:* A CRM system can streamline the enrollment and admissions process by providing an online application portal, tracking application status, and automating the communication process with prospective students.

3.*Donor Management*: A CRM system can be used to manage relationships with donors by tracking donations, communication history, and engagement with the institution.

7. CONCLUSION

In conclusion, developing a customized CRM application for schools and colleges using Salesforce can be an effective way to streamline administrative tasks, improve communication, and enhance the educational experience for students.

Overall, this project highlights the importance of leveraging technology to improve education and enhance the educational experience for students.

8. FUTURE SCOPE

As technology continues to advance, the future of CRM for schools and colleges may include personalized learning experiences for students.CRM systems may also integrate with social media platforms in the future, allowing for more streamlined communication between students, faculty, and administrators.

Overall, the future of CRM for schools and colleges is promising, with the potential to improve educational outcomes and streamline administrative tasks through the use of technology and data-driven insights.