

# A CRM Application for Schools & Colleges

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Team ID	NM2023TMID16767
Project Name	A CRM Application for Schools & Colleges
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Team Members	S.Ganesamoorthy
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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.

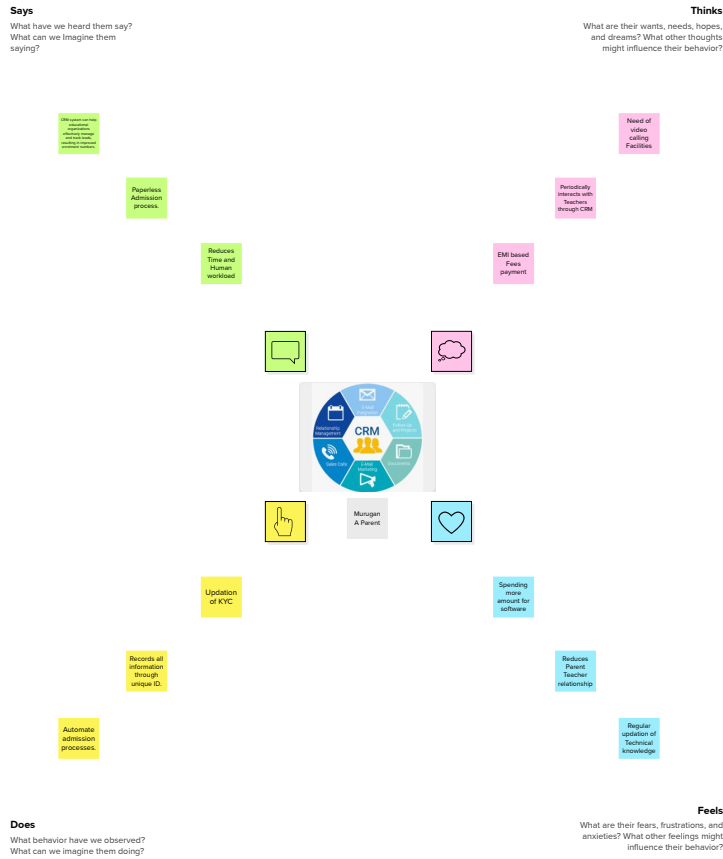
### 1.2 Purpose

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.

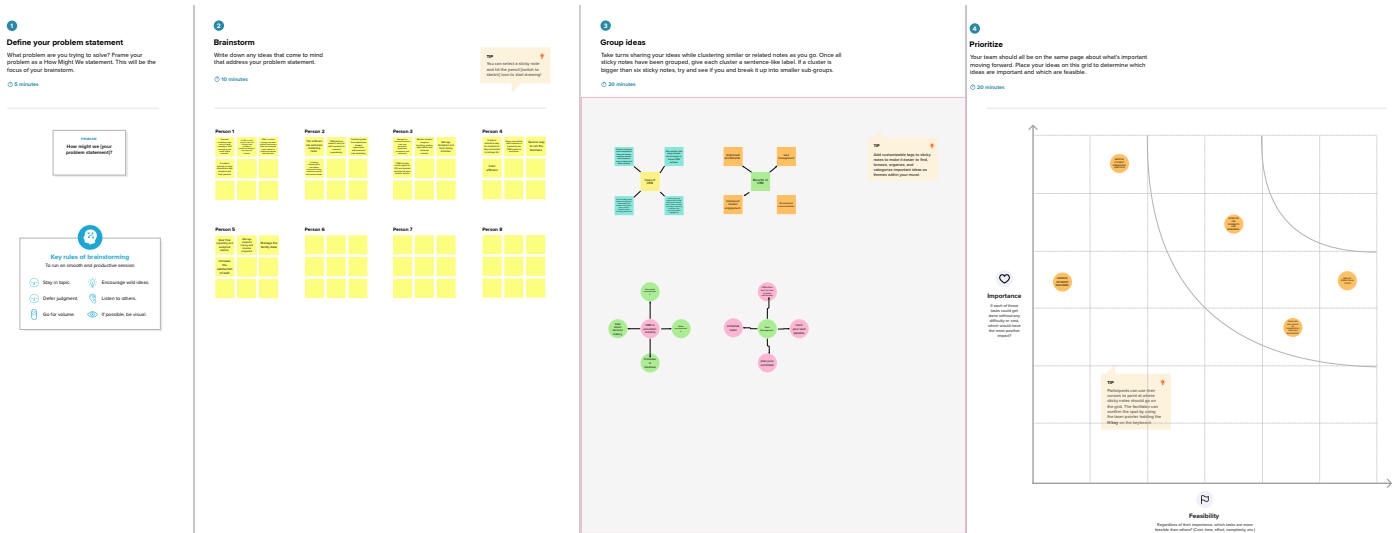
The most essential thing is to select a platform that your team will really utilize and that will help you achieve your goals. Try to avoid using new tools when getting started by choosing a CRM that works well with the existing software and digital platforms your company uses.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy Map



### 2.2 Ideation & Brainstorming Map



### 3. RESULT

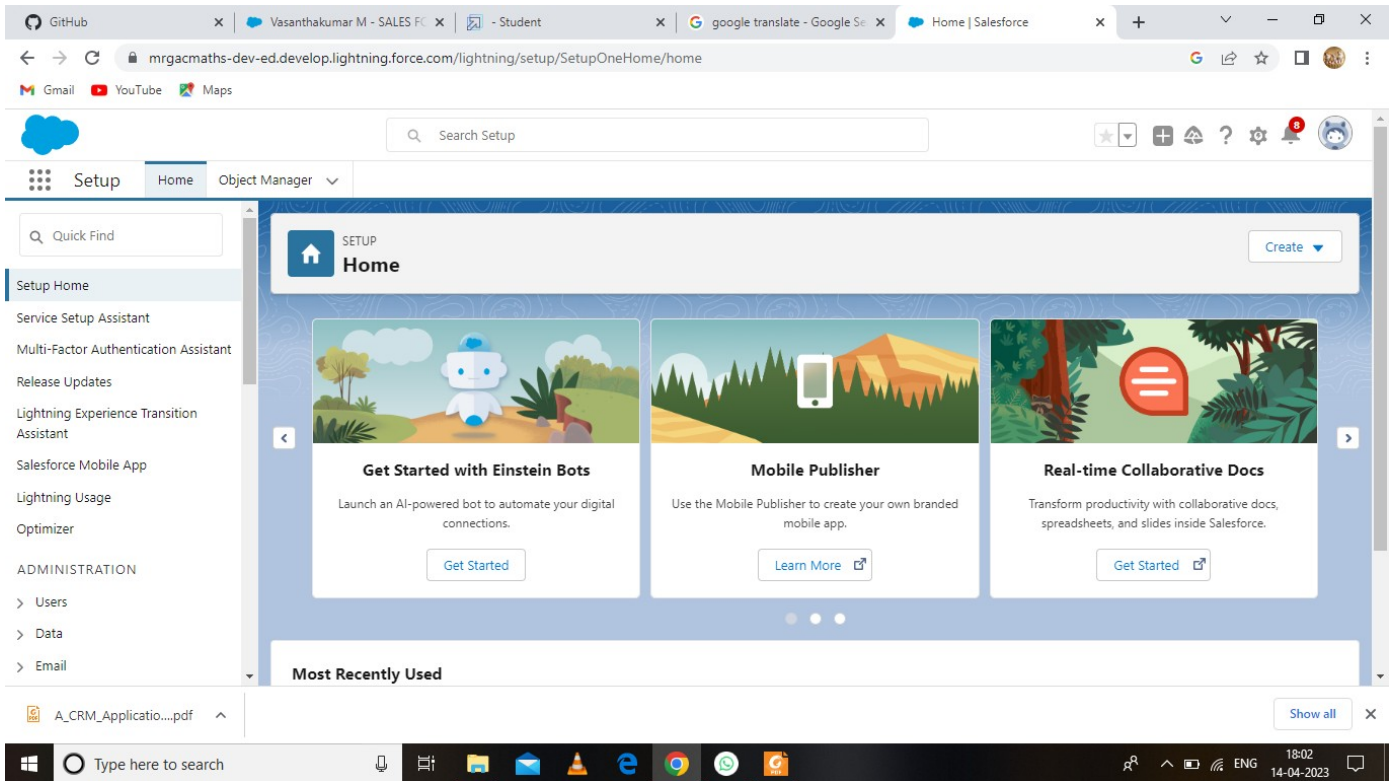
#### 3.1 Data Model:

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

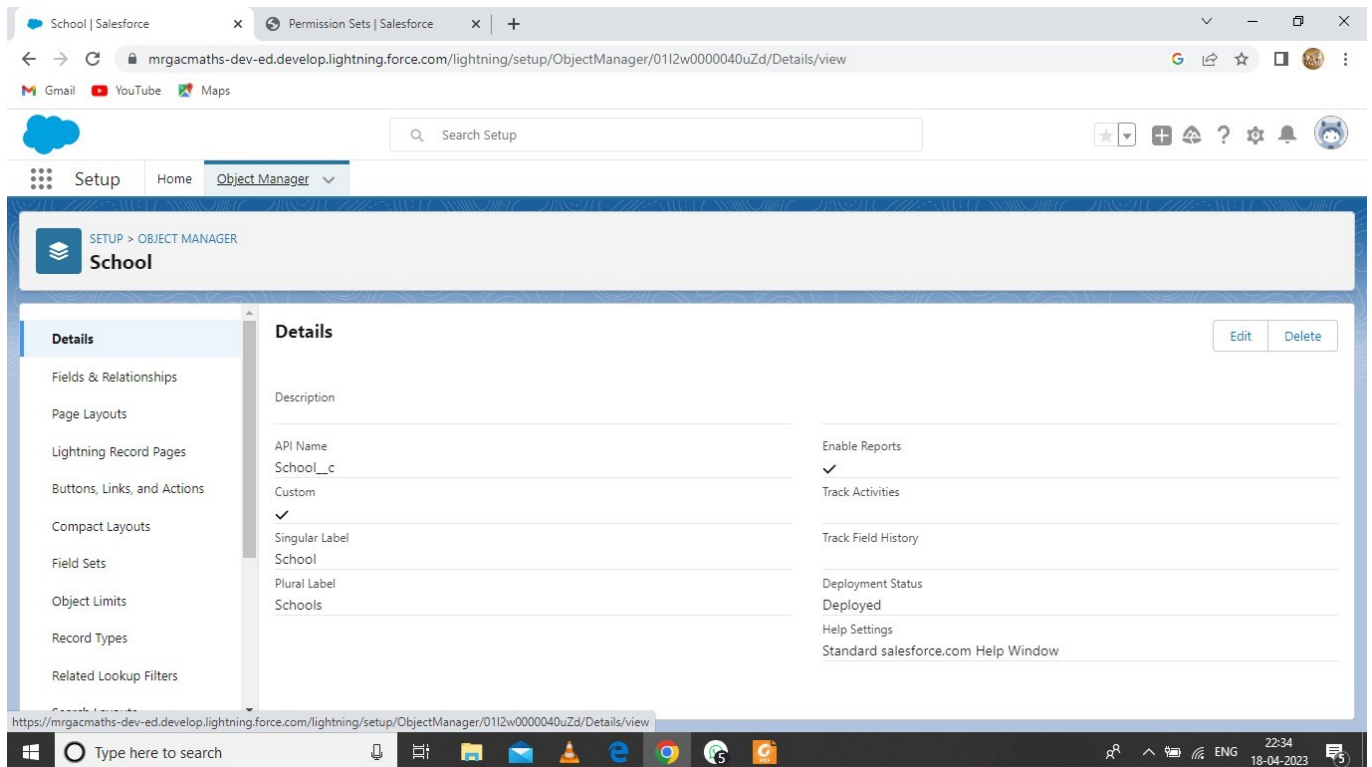
Object Name	Fields in the Object	
Students	Field Label	Data Type
	Phone Number	Phone
	School	Master-Detail Relationship
	Results i) Pass ii) Fail	Pick-List
	Class	Number
	Marks	Number
Parent	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

## 3.2 Activity & Screenshot

### Milestone 1: Creation of Salesforce Account



### Milestone 2: Creating 'School' Object



# Creating 'Student' Object

The screenshot displays the Salesforce Object Manager interface for the 'Student' object. The browser address bar shows the URL: `mrgacmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040uZn/Details/view`. The page title is 'Student'. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Student__c
Custom	✓
Singular Label	Student
Plural Label	Students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The right side of the page has 'Edit' and 'Delete' buttons. The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

# Creating 'Parent' Object

The screenshot displays the Salesforce Object Manager interface for the 'Parent' object. The browser address bar shows the URL: `mrgacmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040vli/Details/view`. The page title is 'Parent'. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Parent__c
Custom	✓
Singular Label	Parent
Plural Label	Parents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The right side of the page has 'Edit' and 'Delete' buttons. The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

## Milestone-3:Creating 'School Management' Lightning App

The screenshot shows the Salesforce Lightning App interface for the 'School Management' app. The top navigation bar includes tabs for 'Schools', 'Students', 'Reports', 'Dashboards', and 'Parents'. The 'Schools' tab is active, displaying a 'Recently Viewed' list. The list is currently empty, with a message stating 'You haven't viewed any Schools recently. Try switching list views.' The interface includes a search bar, a 'New' button, and an 'Import' button. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

## Milestone -4:Fields and Relationship Creating of fields for the School object

The screenshot shows the Salesforce Setup page for the 'School' object. The left sidebar contains a navigation menu with options like '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', and 'List View Button Layout'. The 'Fields & Relationships' section is selected, displaying a table of fields for the 'School' object. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed include 'Address', 'Created By', 'District, State', 'E-mail address', 'Highest Marks', 'Last Modified By', 'Number of students', 'Owner', and 'Phone Number'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District, State	District_State__c	Text Area(255)		
E-mail address	E_mail_address__c	Email		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone Number	Phone_Number__c	Phone		



# Creation of fields for the Student objects

Student | Salesforce x Permission Sets | Salesforce x

mrgacmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040uZn/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Student**

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

Type here to search

22:35  
18-04-2023

# Creation of fields for the Parent objects

Parent | Salesforce x Permission Sets | Salesforce x

mrgacmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040vli/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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 Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Type here to search

22:36  
18-04-2023

## Milestone-5: Creating' School profile.' Profile

The screenshot shows the Salesforce Setup interface. The left sidebar contains the Setup menu with 'Profiles' selected. The main content area displays the 'School profile' details. At the top, there's a 'Profile' header with a 'School profile' title. Below this, a paragraph explains that users with this profile have specific permissions and page layouts. A list of permissions is provided, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. Below the permissions list is the 'Profile Detail' section, which includes a table with columns for Name, User License, Custom Profile, Description, Created By, and Modified By. The table shows the 'School profile' with a 'Salesforce' user license, a checked 'Custom Profile' checkbox, a description, and creation/modification details by 'Vasanthakumar M.' on 18/04/2023. At the bottom, the 'Page Layouts' section is partially visible.

Home | Salesforce x Profiles | Salesforce x

mrghcmaths-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005dSux%3Fsetupid%3DEnhancedProfiles%26ap... Search Setup

Setup Home Object Manager

Search profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profile School profile Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | 
 [Enabled Apex Class Access \(0\)](#) | 
 [Enabled Visualforce Page Access \(0\)](#) | 
 [Enabled External Data Source Access \(0\)](#) | 
 [Enabled Named Credential Access \(0\)](#) | 
 [Enabled Custom Metadata Type Access \(0\)](#) | 
 [Enabled Custom Setting Definitions Access \(0\)](#) | 
 [Enabled Flow Access \(0\)](#) | 
 [Enabled Service Presence Status Access \(0\)](#) | 
 [Enabled Custom Permissions \(0\)](#)

**Profile Detail** Edit Clone Delete View Users

Name	User License	Custom Profile	Description	Created By	Modified By
School profile	Salesforce	<input checked="" type="checkbox"/>		Vasanthakumar M. 18/04/2023, 8:39 pm	Vasanthakumar M. 18/04/2023, 8:45 pm

**Page Layouts**

## Milestone-6: Creating Users

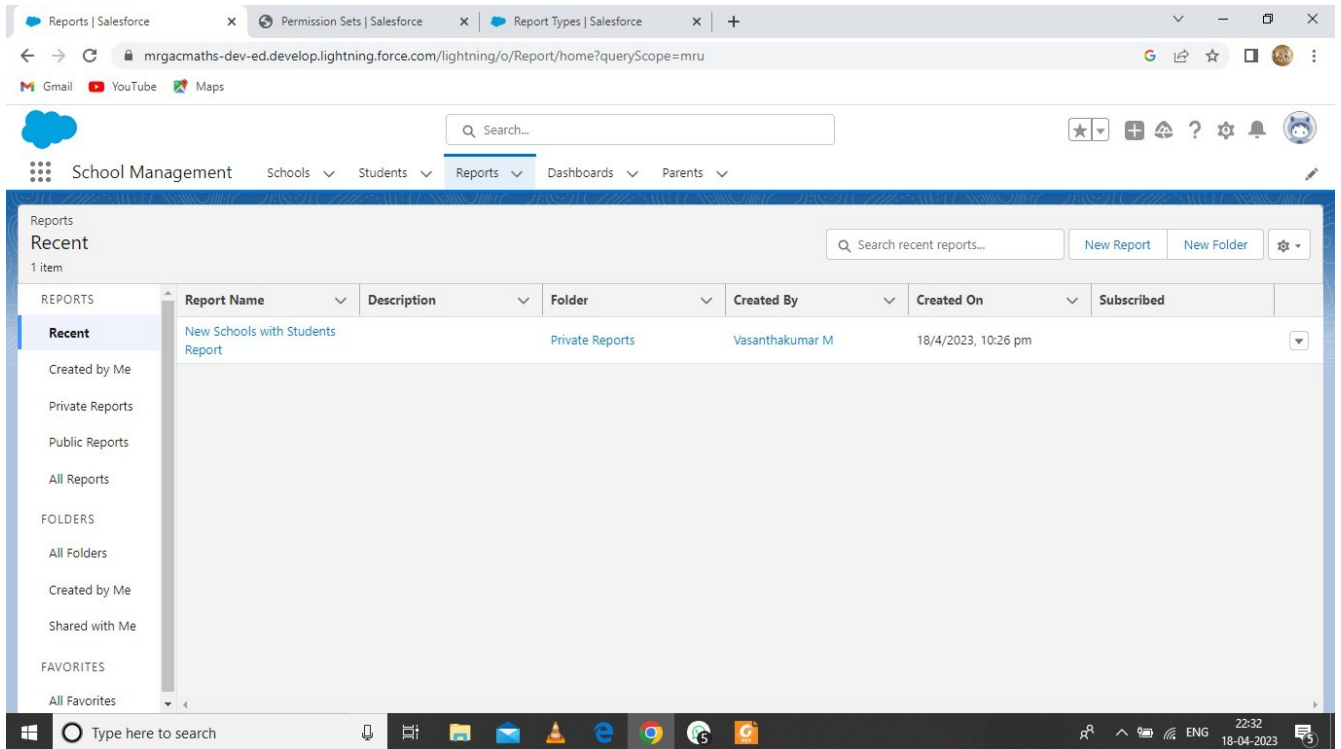
[illegible]

# Milestone-7: Creating Permission sets

The screenshot shows the Salesforce Setup interface for a permission set named 'Principal permission'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Permission Set Overview' for 'Principal permission'. The overview includes fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'. The 'Apps' section is currently expanded, showing a list of apps with columns for Name, API Name, and Namespace Prefix. The 'Assigned Apps' section is also visible, showing a list of apps with columns for Name, API Name, and Namespace Prefix. The 'Assigned Connected Apps' section is also visible, showing a list of apps with columns for Name, API Name, and Namespace Prefix. The 'Object Settings' section is also visible, showing a list of objects with columns for Name, API Name, and Namespace Prefix. The 'App Permissions' section is also visible, showing a list of permissions with columns for Name, API Name, and Namespace Prefix. The 'Apex Class Access' section is also visible, showing a list of classes with columns for Name, API Name, and Namespace Prefix. The 'Visualforce Page Access' section is also visible, showing a list of pages with columns for Name, API Name, and Namespace Prefix.

The screenshot shows the Salesforce Setup interface for a permission set named 'Teachers permission'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Permission Set Overview' for 'Teachers permission'. The overview includes fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'. The 'Apps' section is currently expanded, showing a list of apps with columns for Name, API Name, and Namespace Prefix. The 'Assigned Apps' section is also visible, showing a list of apps with columns for Name, API Name, and Namespace Prefix. The 'Assigned Connected Apps' section is also visible, showing a list of apps with columns for Name, API Name, and Namespace Prefix. The 'Object Settings' section is also visible, showing a list of objects with columns for Name, API Name, and Namespace Prefix. The 'App Permissions' section is also visible, showing a list of permissions with columns for Name, API Name, and Namespace Prefix. The 'Apex Class Access' section is also visible, showing a list of classes with columns for Name, API Name, and Namespace Prefix. The 'Visualforce Page Access' section is also visible, showing a list of pages with columns for Name, API Name, and Namespace Prefix.

## 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

### Disadvantages:

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.