

A CRM APPLICATION FOR SCHOOLS /COLLEGES

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Submitted by

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M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

(Affiliated To Mother Teresa Women's University, Kodaikanal)

Reaccredited with 'A' Grade by NAAC

DINDIGUL-624001.

APRIL - 2023

M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

(Affiliated to Mother Teresa Women's University, Kodaikanal)

CRM APPLICATIONS OF SCHOOLS AND COLLEGE

1. INTRODUCTION

1.1 Overview:

First, let's define CRM is – Customer Relationship Management.

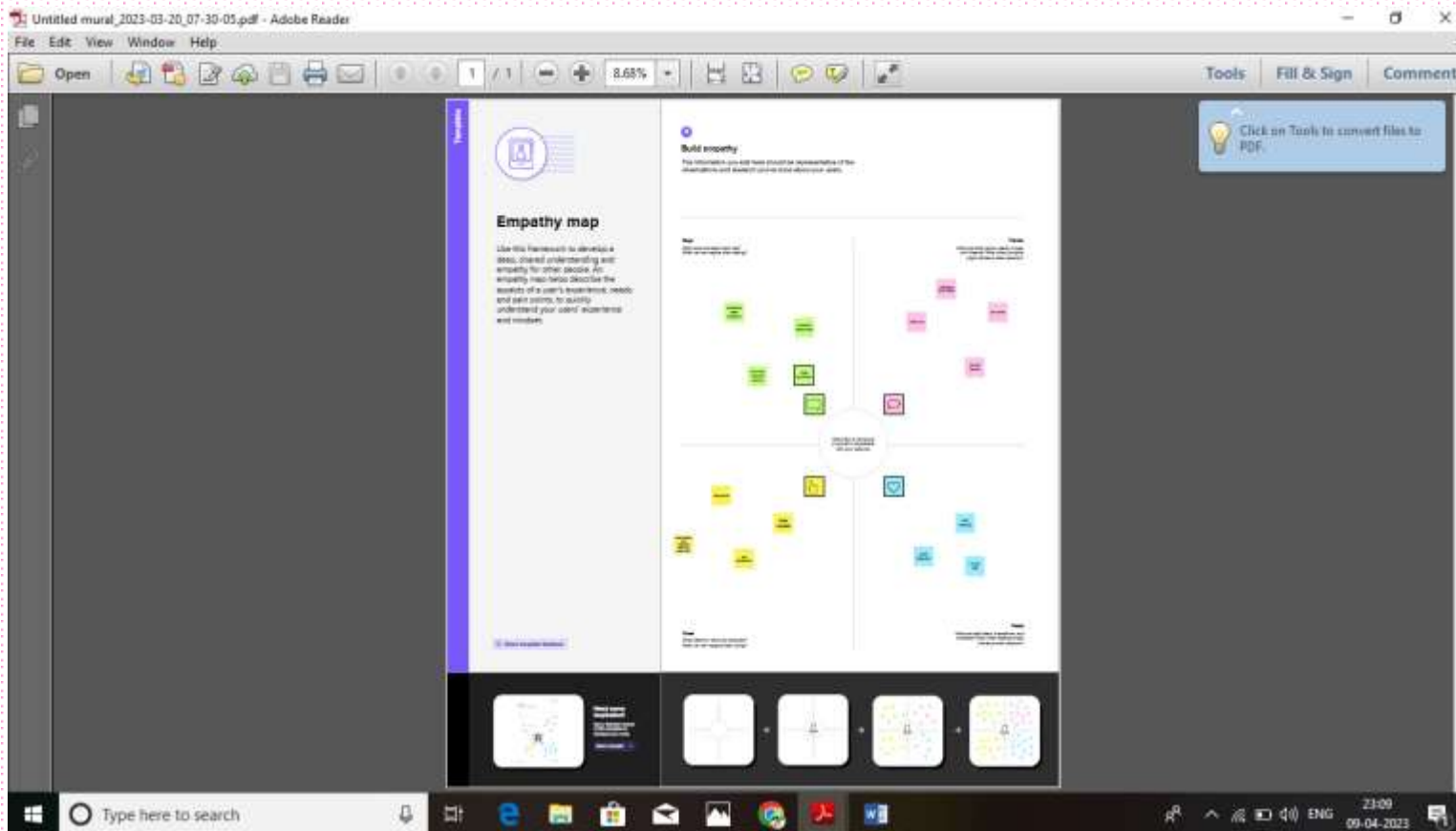
Salesforce is your customer success platform , designed to help you sell, service, market, analyze , and connect with your customers.

1.2 Purpose

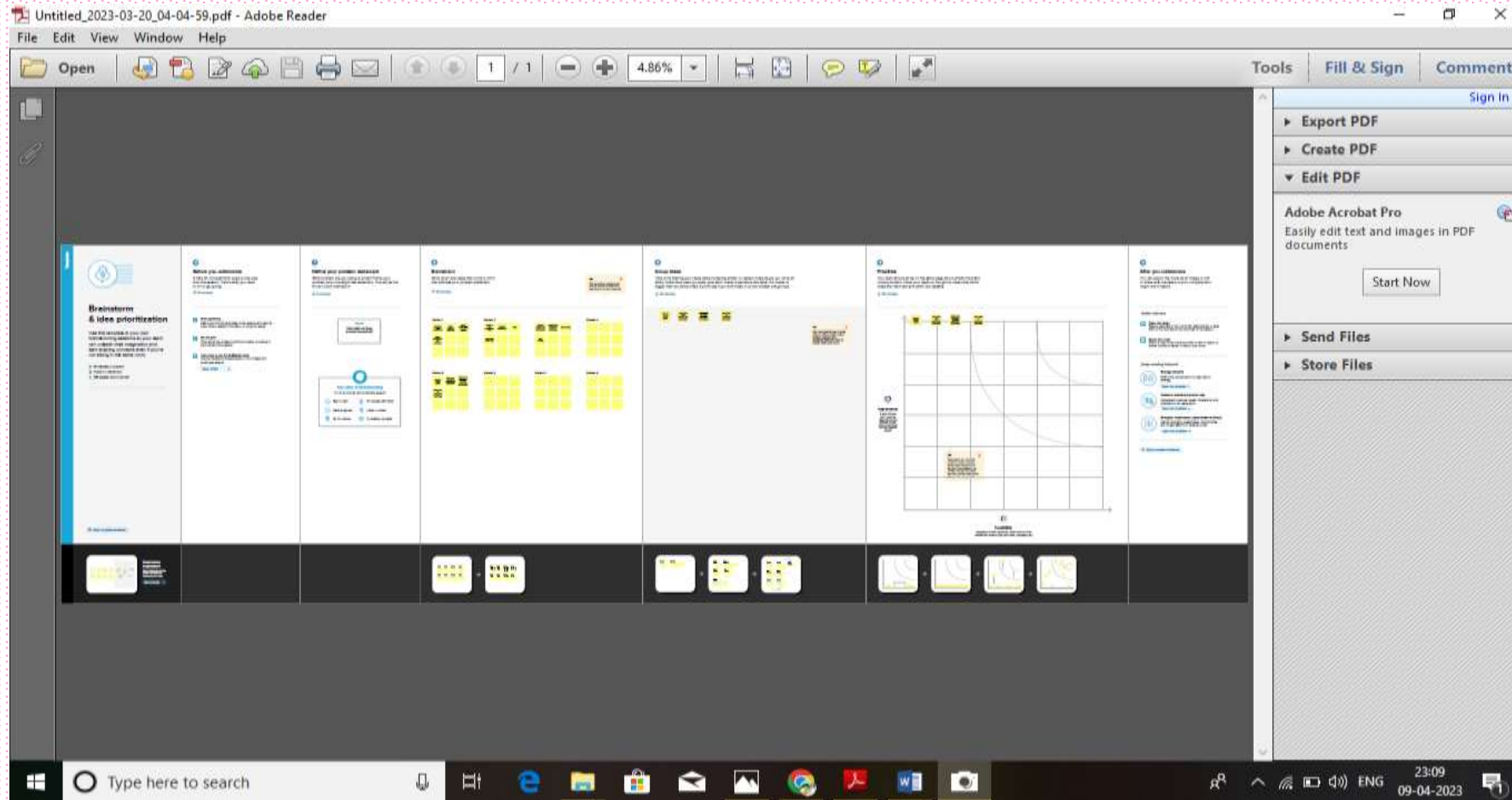
- Improve Student Admissions Lifecycle...
- Track Student Life – Cycle Within the Institution...
- Keep Alumni Information Safe and Accessible...
- Stay Connected with Teams...
- Monitor Fee Payments and Reminders
- Student Record Maintenance
- Online Registration
- Online Fees Payment Provision
- Cloud – Based ERP

2.Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming map



Milestone-1:

Introduction

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Activity: Creating Developer Account

Creating Developer Account

Creating a developer org in salesforce.

- 1. Go to developers.salesforce.com/**
- 2. Click on sign up.**
- 3. On the signup form, enter the following details:**
 - a) First name & Last name**
 - b) Email**
 - c) Role: Developer**
 - d) Company: College Name**
 - e) Postal Code: Pin code**
 - f) Username: should be a combination of your name and company This need not be an actual email id, you can give anything in the format:**

[username@organization.com](#)

- 1. Click on sign up after filling these.**

Login To Your Salesforce Account

- 1. Go to salesforce.com and click on login.**
- 2. Enter the username and password that you just created.**

3.2 Activity & Screenshots

Activity-1: Creation of School Object

Creation of Objects for School Management:

For this school management we need to create 3 objects i.e., school, parents and students.

The below steps will assist you in creation those objects.

1. Click on the gear icon and then select setup
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object

- On the custom Object Definition page, create the object as follows:
- Label : School
- Plural Label : Schools
- Record Name : School Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Student | Salesforce

mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003ELVq/edit?address=%2F0112w000003ELVq%2Fa...

Search Setup

Setup Home Object Manager

SETUP = OBJECT MANAGER

Student

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

Help for this Page

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Student Example: Account

Plural Label Students Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Students Example: Account

Description

Context-Sensitive Help Setting

- ☒ Open the standard Salesforce.com Help & Training window.
- ☐ Open a window using a Visualforce page.

School | Salesforce

mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003ELVq/edit?address=%2F0112w000003ELVq%2Fa...

Search Setup

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Allow Reports ☒

Allow Activities ☐

Track Field History ☐

Allow in Chatter Groups ☐

Enable Licensing ☐

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing ☒

Allow Bulk API Access ☒

Allow Streaming API Access ☒

Deployment Status

[What is this?](#)

In Development ☐

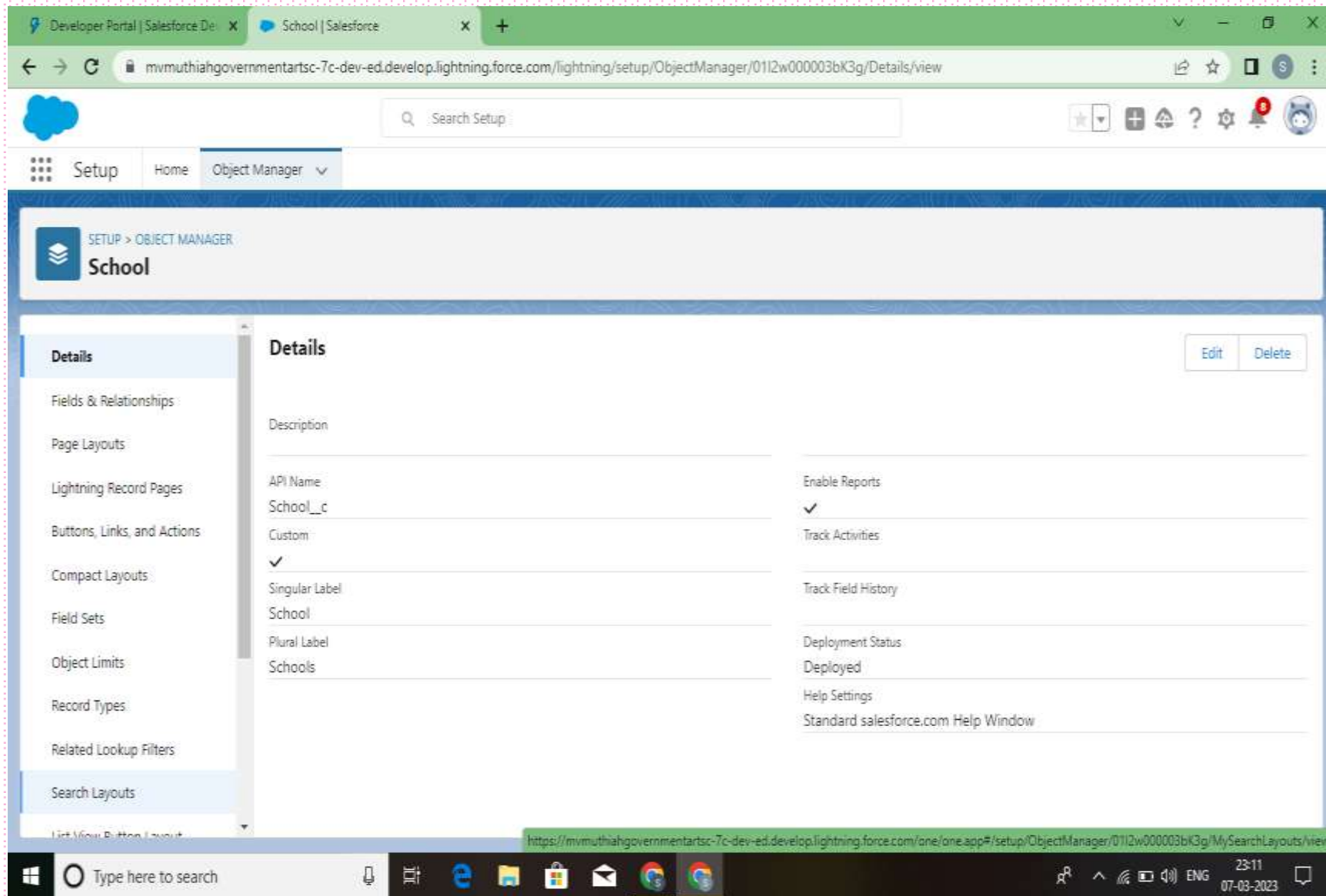
Deployed ☒

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search ☒

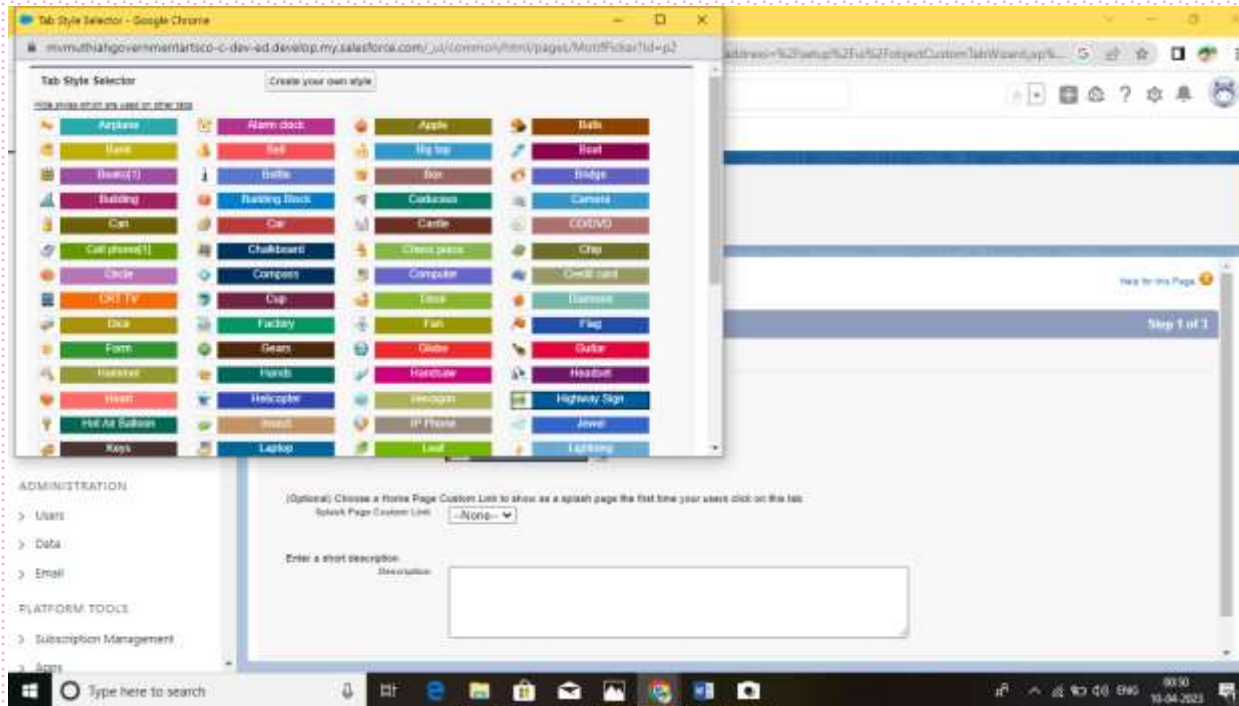
Save Save & New Cancel



Similarly follow the above steps and create an student object and parent object

Now create a custom tab. Click the Home tab, enter Tabs un Quick Find and Select Tabs. Under Custom Tabs, click New.

1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



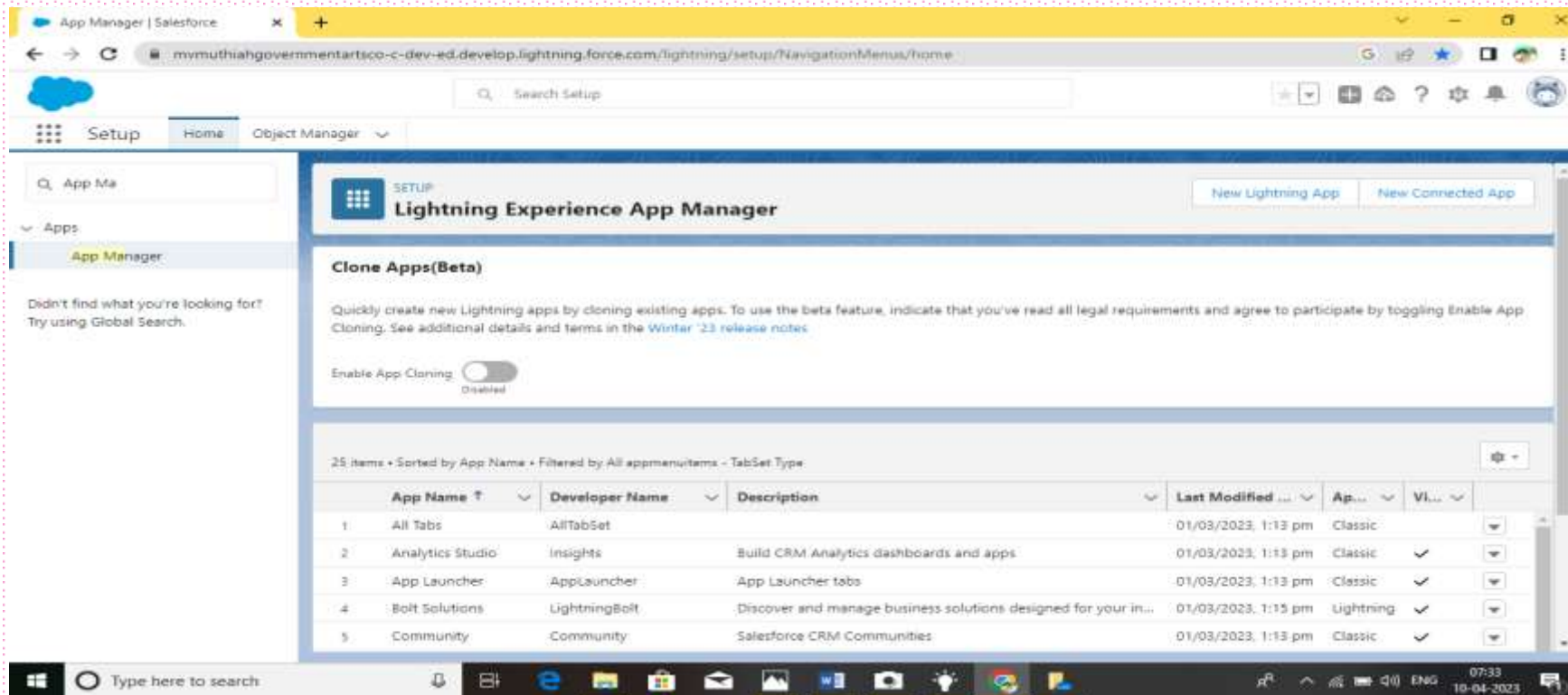
In the same way create other objects such as students and parents

Milestone – 3: Lightning App

Activity:

Create the School Management app

- From Setup, enter App Manager in the Quick Find and Select App Manager.



home - Search | Salesforce x Home | Salesforce x +


mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home


Search Setup


Setup Home Object Manager


App Launcher

Search apps or items... Visit AppExchange

**Digital Experiences**
Manage content and media for all of your sites.

**Salesforce Scheduler Setup**
Set up personalized appointment scheduling.

**Bolt Solutions**
Discover and manage business solutions...

**SM School Management**

▼ All Items

Accounts	Communication Subscription Consents	Finance Balance Snapshots	Orders	Salesforce Scheduler Setup Assistant
Alert Settings	Communication Subscription Timings	Finance Transactions	Org Metrics	Schools
Alternative Payment Methods	Communication Subscriptions	Forecasts	Parents	Scorecards
App Launcher	Consumption Schedules	Groups	Party Consent	Security Policies

NAME	TYPE	OBJECT
Teacher permission 1	Permission Set	

Type here to search

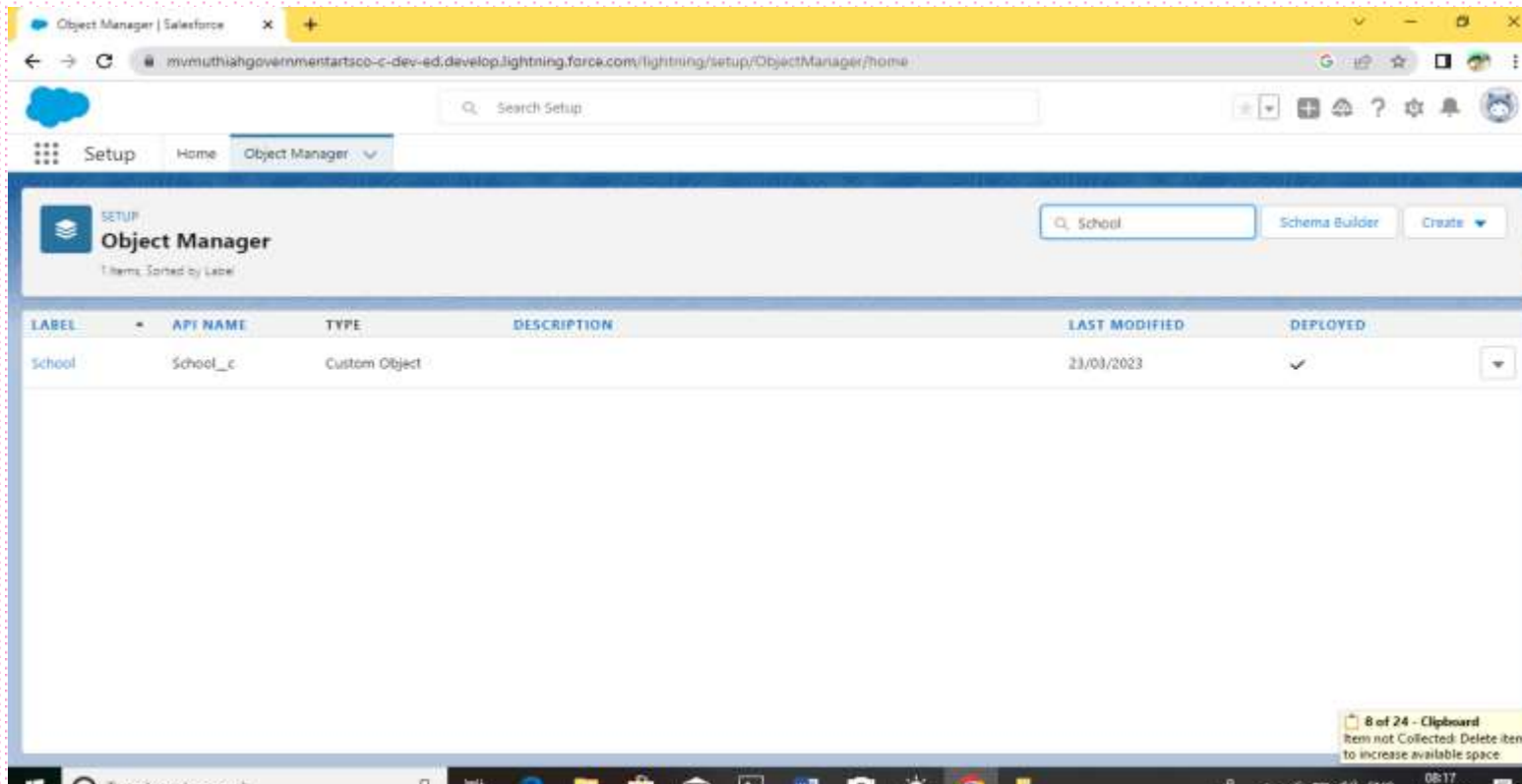
21:48 10-04-2023

Milestone-4: Fields and Relationship

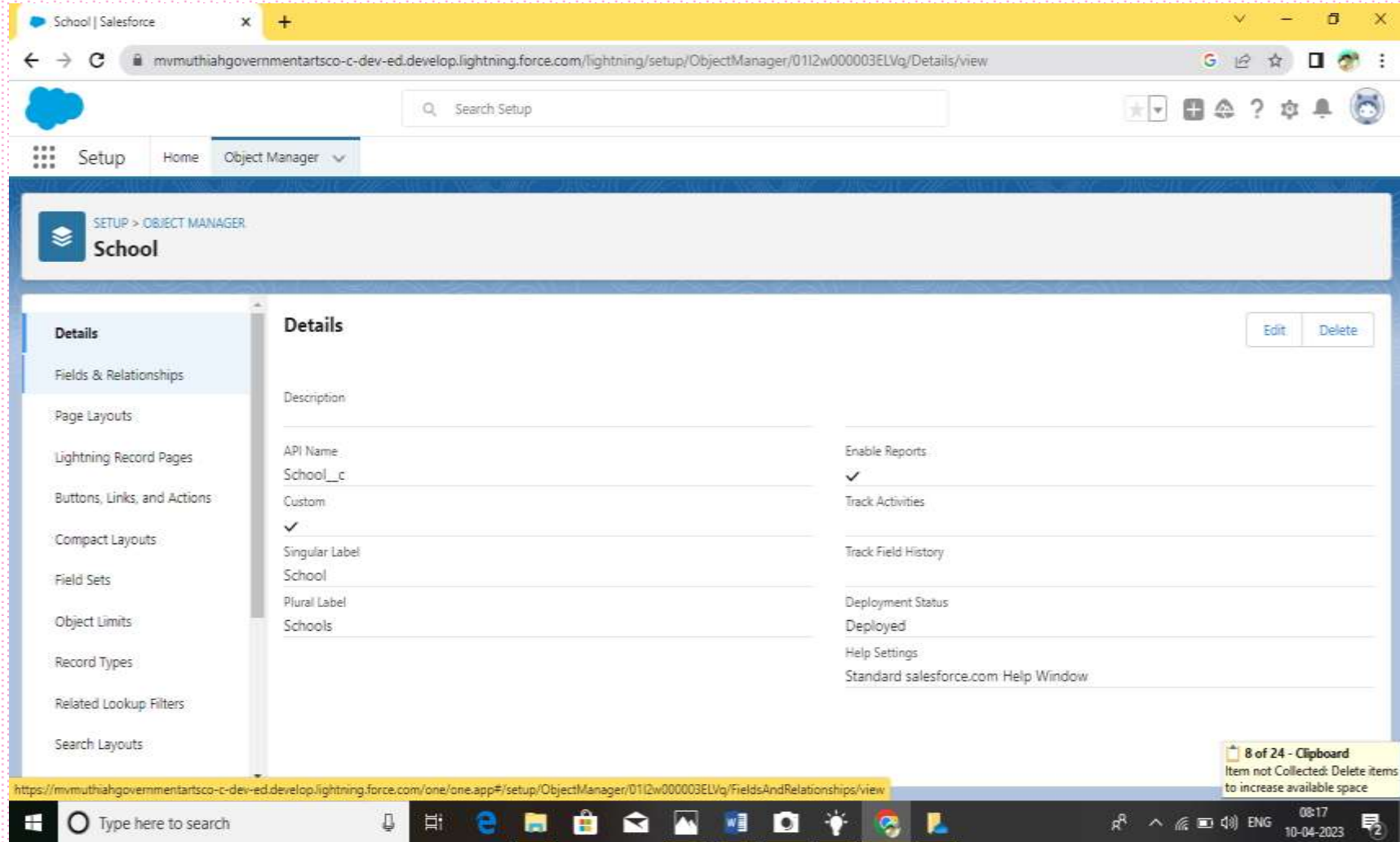
Activity-1:

Creation of Fields for the School objects:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation, and click New.

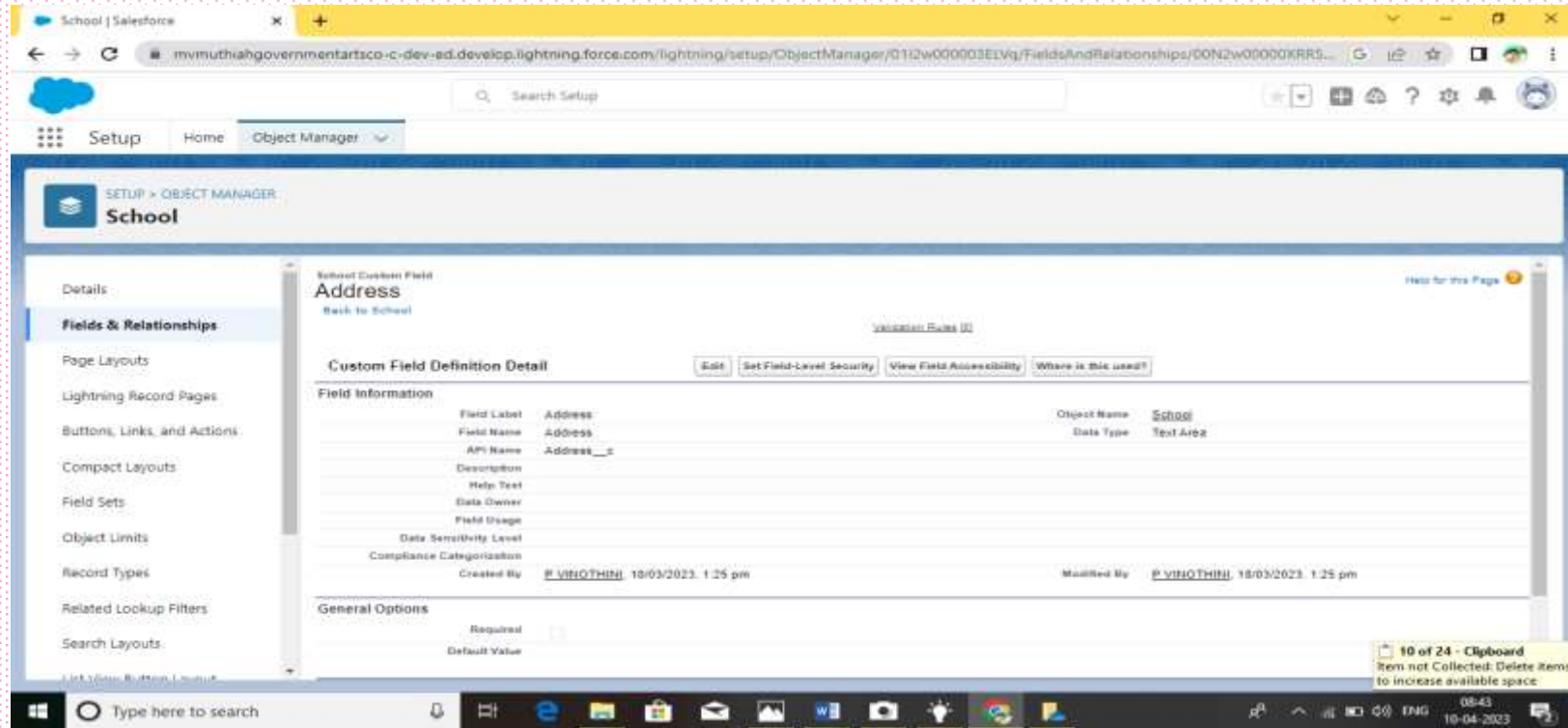


1. Select School.
2. Select Fields & Relationships from the left navigation, and click New.
3. Click Next, Next, then Save & New



Now we're ready to make a custom field. Let's do this!

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Address.
3. Click Next, Next, then Save & New



4. Follow steps 1 through 3 and create two more text areas with District, State and School similarly same procedure to other fields and relationship and then Data type, Label name will be change.

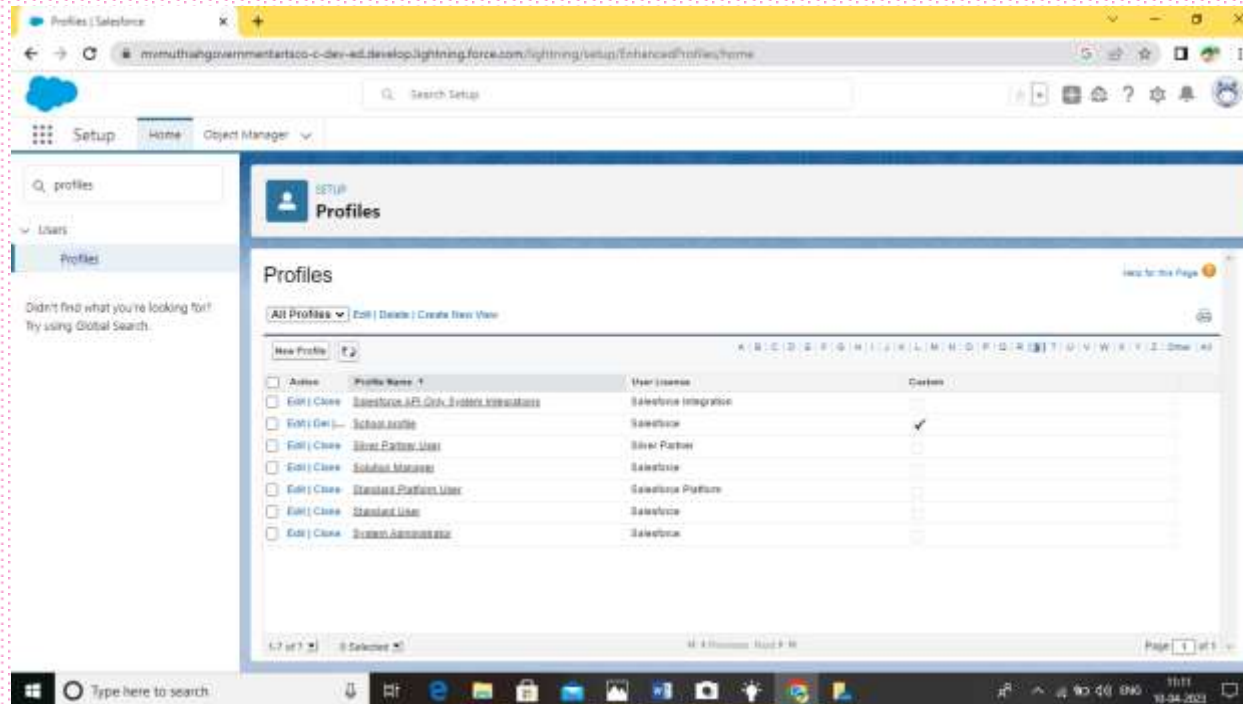
Milestone-5: Profile

Activity:

Creation on profile:

From Setup enter Profiles in the Quick Find box, and select profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter School profile.



Profiles | Salesforce

mvmtuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfile...

Search Setup

SetupHomeObject Manager

profiles

UsersProfiles

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

SETUP

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile

Standard User

User License

Salesforce

Profile Name

School profile

Save

Cancel

Help for this Page

Type here to search

11:12

10-04-2023

Profiles | Salesforce

mvmtuhiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005dOZg%2Fe%3FretURL%3D...

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

Permission Set Groups

Permission Sets

Profiles

Public Groups

SETUP

Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Parents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Students

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After2 hours of inactivity

Session Security Level Required at Login--None--

Password Policies

User passwords expire in90 days

Enforce password history3 passwords remembered

Minimum password length8

Password complexity requirementMust include alpha and numeric characters

Password question requirementCannot contain password

Maximum invalid login attempts10

javascript:srcUp(%27%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fi...

Type here to search

17:4010-04-2023

Profiles | Salesforce

mvmtuthiahgovernmentartsc-c-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005d2X0

Search Setup

SetupHomeObject Manager

profiles

UsersProfiles

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

SETUP

Profiles

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

EditCloneDeleteView Users

Name	School profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	P VINOTHINI, 28/03/2023, 1:26 pm	Modified By	P VINOTHINI, 10/04/2023, 9:17 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout	Opportunity Product	Opportunity Product Layout

Type here to search

11:13

10-04-2023

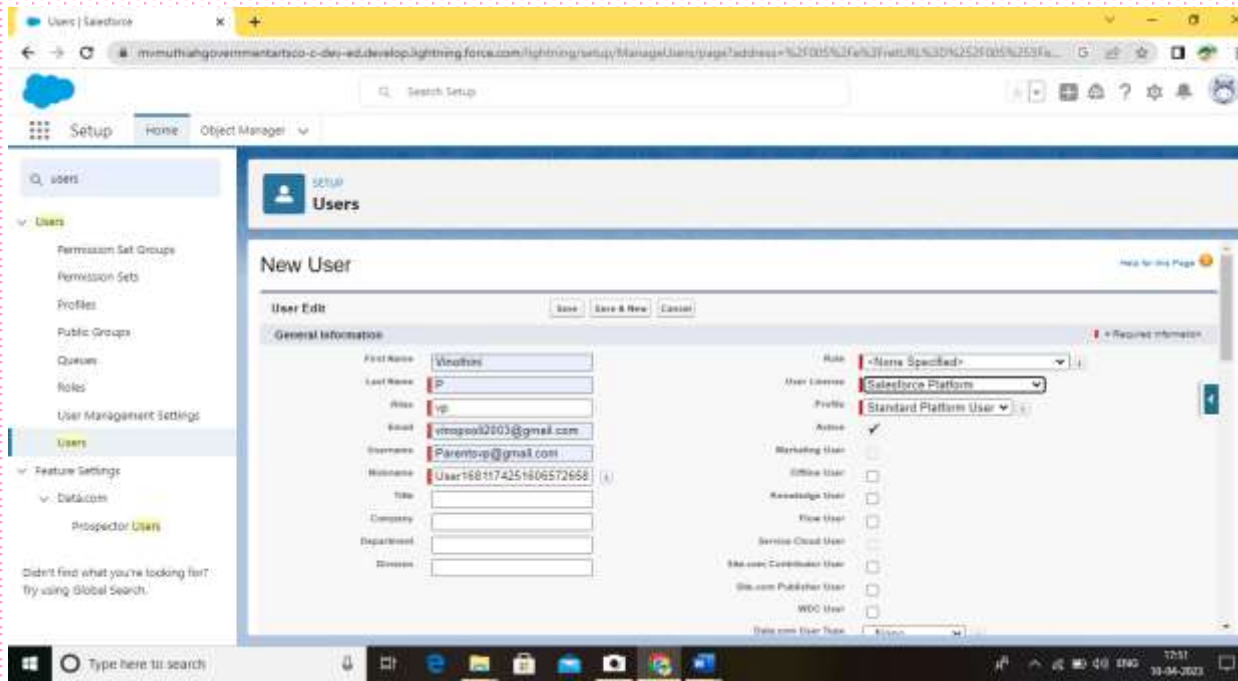
ENG

Milestone-6: Users

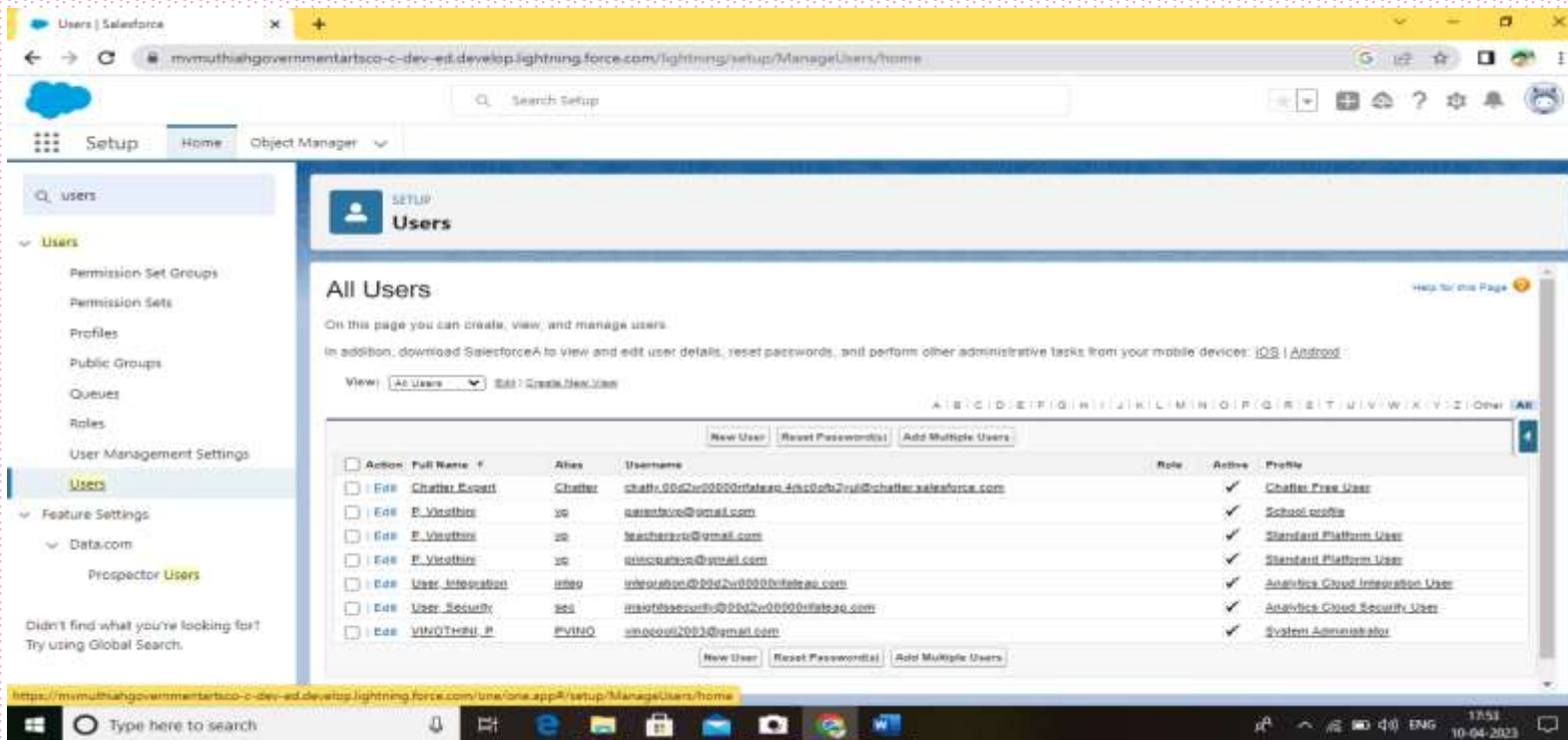
Activity:

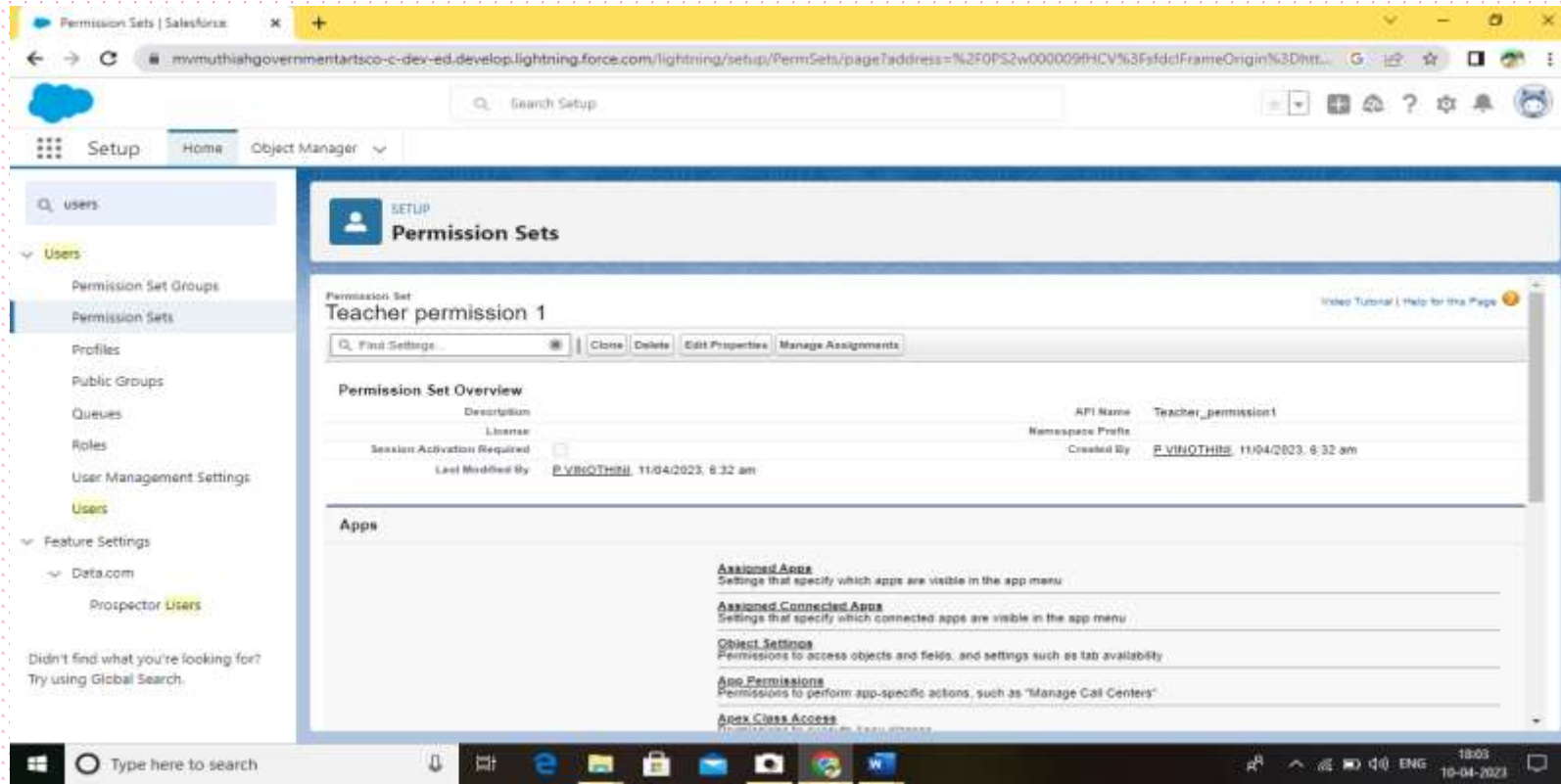
Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the User's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username as the email address.
4. Select a User License As salesforce.
5. Select a profile as a School profile.
6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



7. Similarly follow the above steps and create 3 users as teachers and Principals.





Similarly follow the above steps for the permission set 2.

Activity-2:

Permission sets 2:

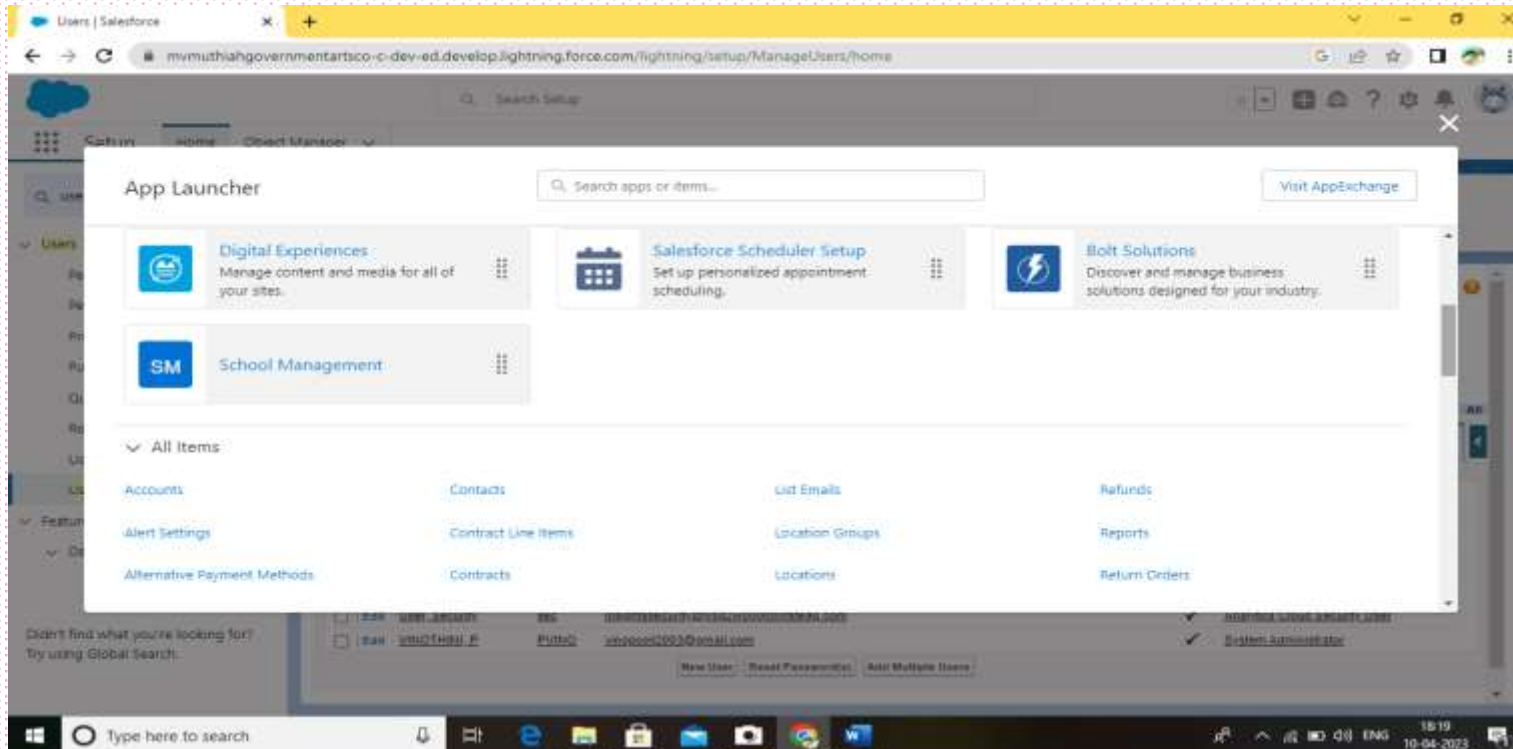
1. From Setup, enter Permission on Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set names as principal permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the principal user.

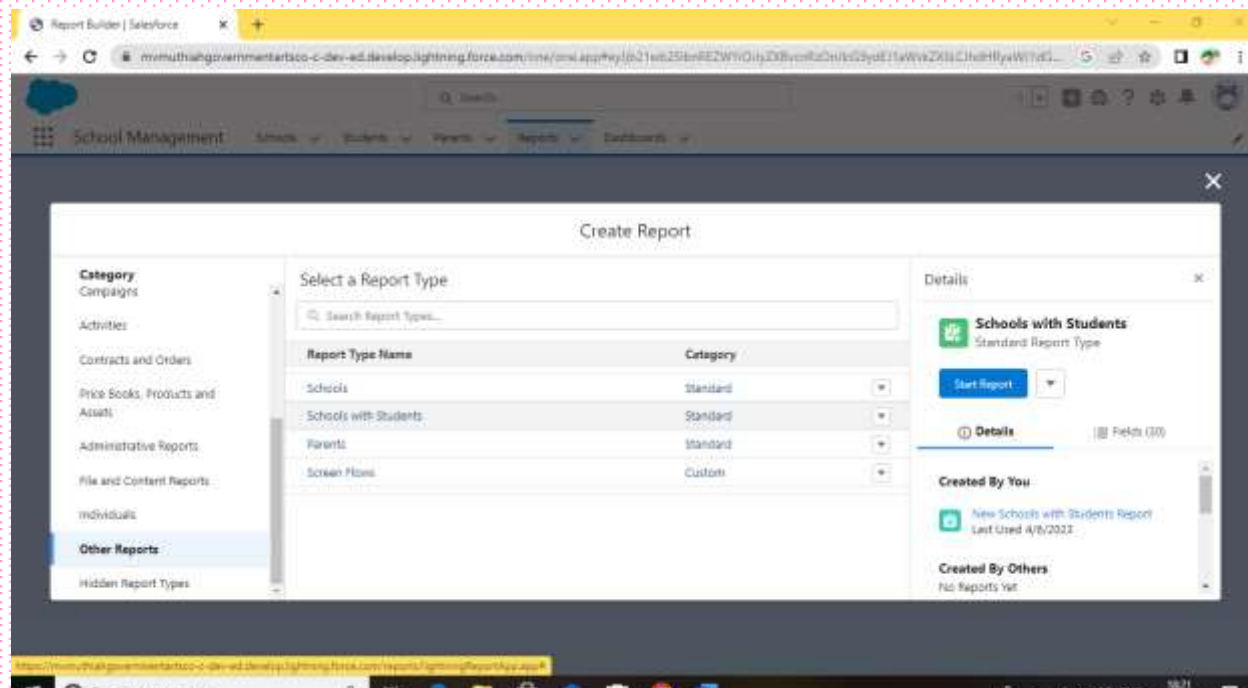
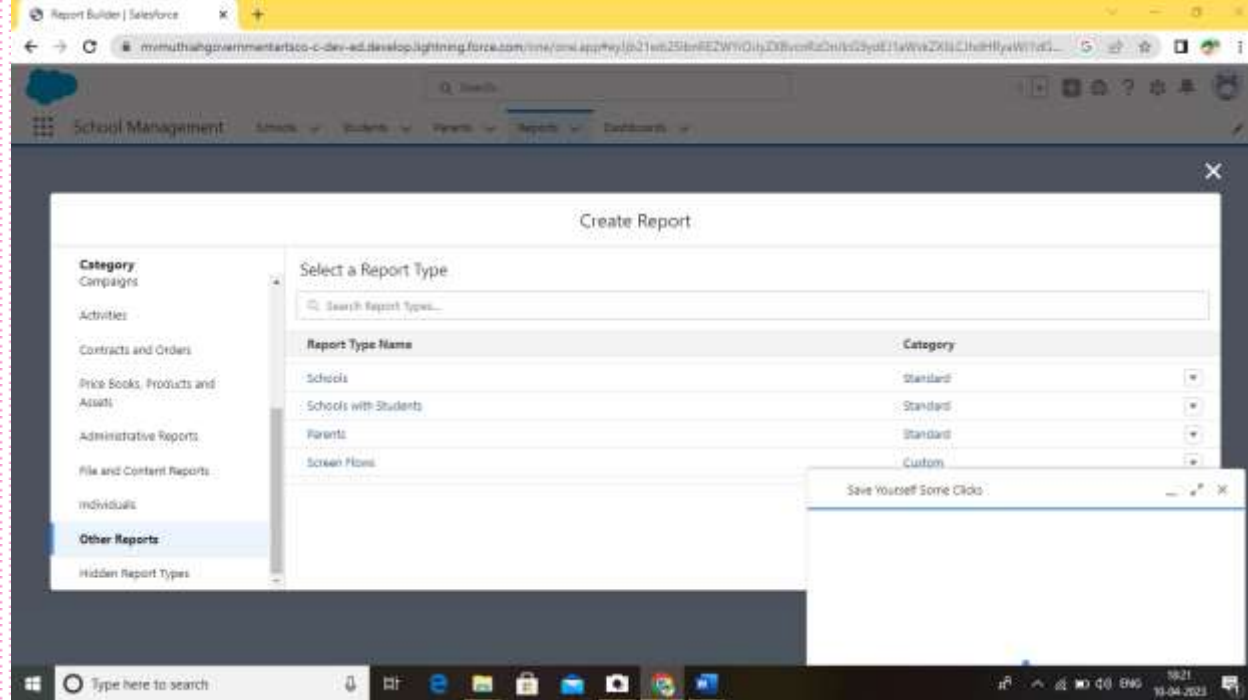
Milestone-8: Reports

Activity:

Reports:

1. From the Reports tab, click New Report.
2. Select the report type as School with students and parents for the report, and click Create.
3. 3.Customize your report, then save or run it.





CONCLUSION

For institutions looking for CRM software that offers tools to manage every part of the student life cycle, from enquiry to alumni, the following systems may be a good fit:

1. Campus Management (Campus Nexus CRM)
2. Ellucian (Recruiter)
3. Hobsons (Radius)
4. Jenzabar (SEM CRM)
5. Maximizer CRM (Student Relate)
6. Pro-retention (Enrollment CRM)

The background features abstract, overlapping geometric shapes in various shades of pink and magenta, creating a modern, layered effect. The shapes are primarily triangular and polygonal, with some areas appearing more translucent than others.

Thank You