

Student Management by using Zoho Creator



Business Name

STE Techsystem Pvt. Ltd.

Company Profile

- Website www.softwaretestingedu.com
- Industry Education
- Type B2C
- Location Madhya Pradesh, India

Solution Provided:

- Zoho Creator

Case Study



Introduction

Infobyd Software Solutions is a rapidly expanding IT organization and a certified Zoho Advanced Partner, recognized for delivering comprehensive business solutions through Zoho's powerful suite of applications. As a trusted digital transformation partner, Infobyd enables organizations to streamline operations, enhance customer engagement, and accelerate business growth through innovative technology solutions.

Case Study

With a deep focus on client success, Infobyd delivers fully customized, end-to-end Zoho implementations across multiple business functions — including Customer Relationship Management (CRM), Finance, Human Resources, Inventory Management, Procurement, and more. Each solution is tailored to the client's unique workflows, ensuring seamless system integration and process optimization.

Beyond solution design and deployment, Infobyd also provides robust Quality Assurance (QA) services, offering both manual and automated testing capabilities. Leveraging Zoho Sprints for structured project and test management, the team ensures efficient test planning, defect tracking, performance validation, and continuous quality enhancement.

To date, Infobyd has successfully delivered 1,750+ projects across diverse industries such as Healthcare, Manufacturing, Education, Solar Energy, Fleet Management, Trading, Information Technology, Print & Publication, Multimedia Advertising, and Financial Services. This broad industry expertise, combined with deep knowledge of the Zoho ecosystem, empowers Infobyd to deliver scalable, reliable, and future-ready solutions that drive measurable impact and long-term success for modern enterprises.

STE TechSystem, a prominent training institute specializing in software testing and IT skill development, manages a high volume of student enquiries, admissions, and fee transactions throughout the year. As the institute expanded, its manual data handling methods—spreadsheets, offline tracking, and fragmented communication—became increasingly inefficient.

To address these challenges, Infobyd Software Solutions implemented a fully customized Zoho Creator-based Student Management System, offering automation, centralization, and real-time control over the institute's student lifecycle processes.

Case Study



Project Overview

The primary objective was to develop a scalable and automated platform that could manage the complete student journey—from enquiry to admission to fee completion. The Zoho Creator solution included modules for Enquiry Management, Lead Tracking, Student Registration, Course Allocation, and Fee Management, ensuring accurate data handling and seamless administrative operations.

This implementation empowered STE TechSystem with a unified system that brought clarity, transparency, and efficiency across all departments including counselling, administration, and finance.



Key Takeaways

- 100% centralized database for all enquiries, students, courses, and payments.
- Automated lead follow-ups, fee reminders, and course-based workflows.
- Clear visibility on outstanding fees, admissions, and enquiry conversions.
- Reduced manual data entry and eliminated spreadsheet dependency.
- Improved decision-making through dashboards and MIS reporting.



Problem Statement

Before implementation, STE TechSystem faced several operational roadblocks:

- Enquiries were captured manually, leading to missed follow-ups.
- No structured classification of enquiries, leads, or interested courses.
- Admission records and student details were fragmented across spreadsheets.
- Fee payments—especially installments—were tracked manually, causing errors.

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- No centralized system to monitor course enrolments, batches, and student progress. This disorganized structure limited growth, slowed operations, and resulted in inefficiencies across departments.



Key Challenges

During the assessment, Infobyd identified the following challenges:

- 1. High volume of enquiries without proper tracking or follow-up automation.**
- 2. Scattered student data**, making it difficult to maintain accurate academic and financial records.
- 3. Manual fee tracking**, causing delays, calculation errors, and missed payment reminders.
- 4. Inconsistent lead-to-student conversion flow**, reducing admission efficiency.
- 5. No real-time dashboards**, forcing teams to compile reports manually.
- 6. Lack of workflow automation** for counsellors and administrators.

These challenges highlighted the need for an integrated digital framework.



Proposed Solution

Infobyd designed a custom Zoho Creator Application tailored specifically for training institute operations, featuring:

Enquiry & Lead Management

- Centralized enquiry form capturing details such as name, contact, course interest, and source.
- Automatic lead assignment and follow-up reminders.

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- Lead status tracking (New -> Contacted -> Interested -> Converted).

Student Registration & Course Management

- Lead-to-student conversion with a single click.
- Course mapping with batch assignment, duration, and faculty.
- Course catalogue with structured syllabus and fee model.

Fee & Installment Management

- Automated fee plans (full payment, partial, installment-based).
- Payment receipts, outstanding tracking, and due reminders.
- Real-time visibility into collected fees and pending amounts.

Reporting & Dashboards

- Enquiry conversion reports.
- Fee collection vs. outstanding dashboards.
- Course-wise and counsellor-wise performance analytics.

This solution created a streamlined, end-to-end digital student management ecosystem.



Implementation

The project was executed in multiple phases:

Phase 1: Requirement Gathering

- Conducted workshops with management and academic staff.
- Mapped student lifecycle, fee cycles, and enquiry stages.

Phase 2: System Design

- Designed forms, workflows, data models, and automations.

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- Created comprehensive course, batch, and fee structures.

Phase 3: Development

- Built Enquiry, Lead, Student, Course, Batch, and Fee modules.
- Implemented reminders, approval processes, and student dashboards.

Phase 4: Testing & Validation

- UAT testing with real student data.
- Validation of calculations, transitions, and notifications.

Phase 5: Training & Go-Live

- Hands-on training for counselling, admin, and finance teams.
- Go-live with real-time admission and fee tracking.



Results

The Zoho Creator Student Management System delivered powerful results for STE TechSystem:

- Enquiry follow-up improved by 80% due to automation.
- Fee tracking accuracy increased to nearly 100%, eliminating manual errors.
- Lead-to-student conversion increased with structured workflows.
- Complete transparency in courses, batches, and student records.
- Admin team productivity increased as manual paperwork drastically reduced.
- Management now has real-time dashboards for admissions, revenue, and pending fees.

Client Testimonial



Vaishali Sharma

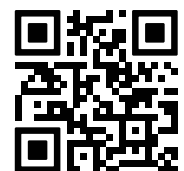
Director | STE Techsystem Pvt. Ltd.

About ZOHO and INFOBYD

"Infobyd has successfully developed our Student Management System. We are now able to track all the details smoothly & on time. We are so happy with their service & support. Highly recommended! Looking forward to a long term association. A big thanks to the Infobyd team & to Shefali Malviya for the continious help & support."



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