

**BHARATHI WOMEN'S COLLEGE (AUTONOMOUS),
CHENNAI - 600108**

**A PROJECT
ON
A CRM APPLICATION FOR
SCHOOLS / COLLEGES**

BY

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1. INTRODUCTION

1.1 OVERVIEW

A CRM is a system that helps schools manage the entire lifecycle of potentials. Application for the students who are starting their journey of studies. CRM systems are software applications which means automate and manage communication with current students. Personal details of students are maintained easily through this application. The CRM (Customer Relationship Management) application is one of the trustable platforms for schools/colleges.

1.2 PURPOSE

- Reduction in expenses.
- Improvement of the organization Management process.
- Increases the loyalty of students.
- Increases the number of prospective students.
- It gives a glimpse of the history of students.
- It reduces errors.
- Able to create documents related to school management.
- Able to attain thorough knowledge of CRM Applications.
- Able to create a schedule or reports related to student details.

Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says
What have we heard them say?
What can we imagine them saying?

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Does
What behavior have we observed?
What can we imagine them doing?

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

Give them a name and a portrait to empathize with your persona.

Easy to apply
Easy to apply
To reduce our valuable time
Easy to apply
To make
Easy to choose our
This is our platform to enhance our
To very useful
Tension
My way to
From platform
What our
My application

2.2 IDEATION AND BRAINSTORMING MAP

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Person 1

REDUCES THE VALUABLE TIME	MINIMIZE THE COST	EXPAND THE KNOWLEDGE
EASY TO APPLY	MORE DETAILS TO KNOW ABOUT COLLEGES	

Person 2

STRESS FREE APPLY METHOD	PLATFORM FOR DEVELOPING SKILLS	MAKE PEOPLE RELAX
GOOD REPUTATION OF SCHOOL / COLLEGE		

Person 3

MOSTLY USEFUL IN PANDEMIC SITUATION	KNOW THE POSITIVES AND NEGATIVES	MORE JOY WITH APPLICATION
TO CHOOSE FAVOURITE COURSE		

Person 4

ENVELOPING THEIR IDEAS	REVIEW THE COMMENTS ABOUT SCHOOL / COLLEGES	ABLE TO CHOOSE COMFORTABLE APPLICATION COST
CHOOSE FAVOURITE SCHOOL / COLLEGES		

Person 5

Person 6

Person 7

Person 8

3

Group Ideas

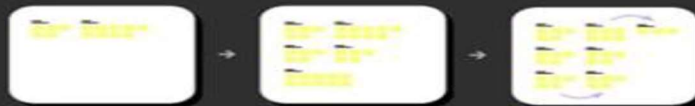
Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

Tip

Have participants take 10 sticky notes to make it easier to find, remove, organize and categorize important ideas as they develop their notes.

- 1)MAKE HAPPY WITH ONLINE APPLICATION PROCESS
- 2)STRESS FREE
- 3)REDUCES THE TIME
- 4)MINIMIZE THE COST
- 5)HAPPY WITH THE APPLICATION RESULT
- 6)PROCESSING WORK IS FINISHED EASILY

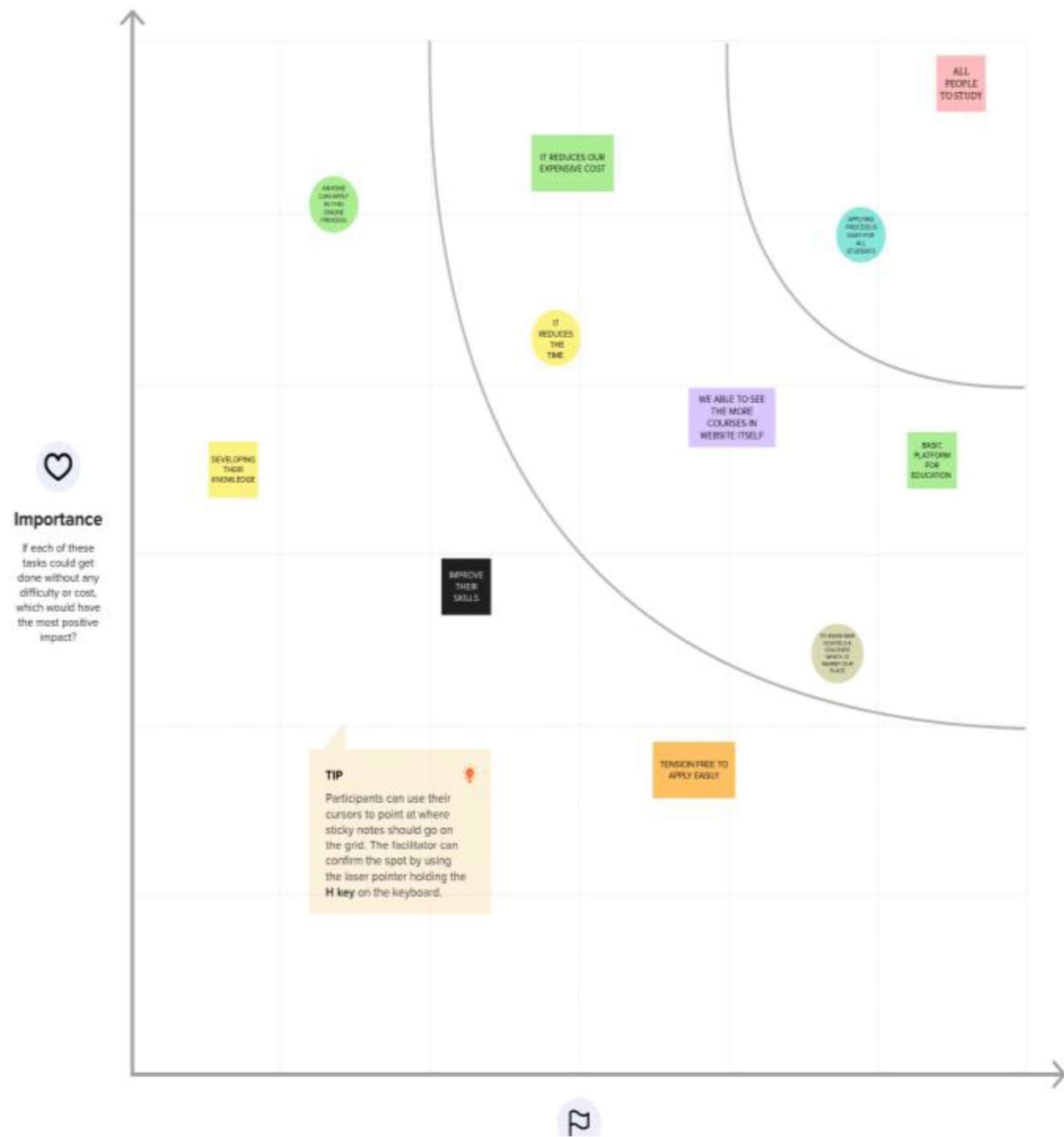


4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕒 20 minutes



2

3. RESULT

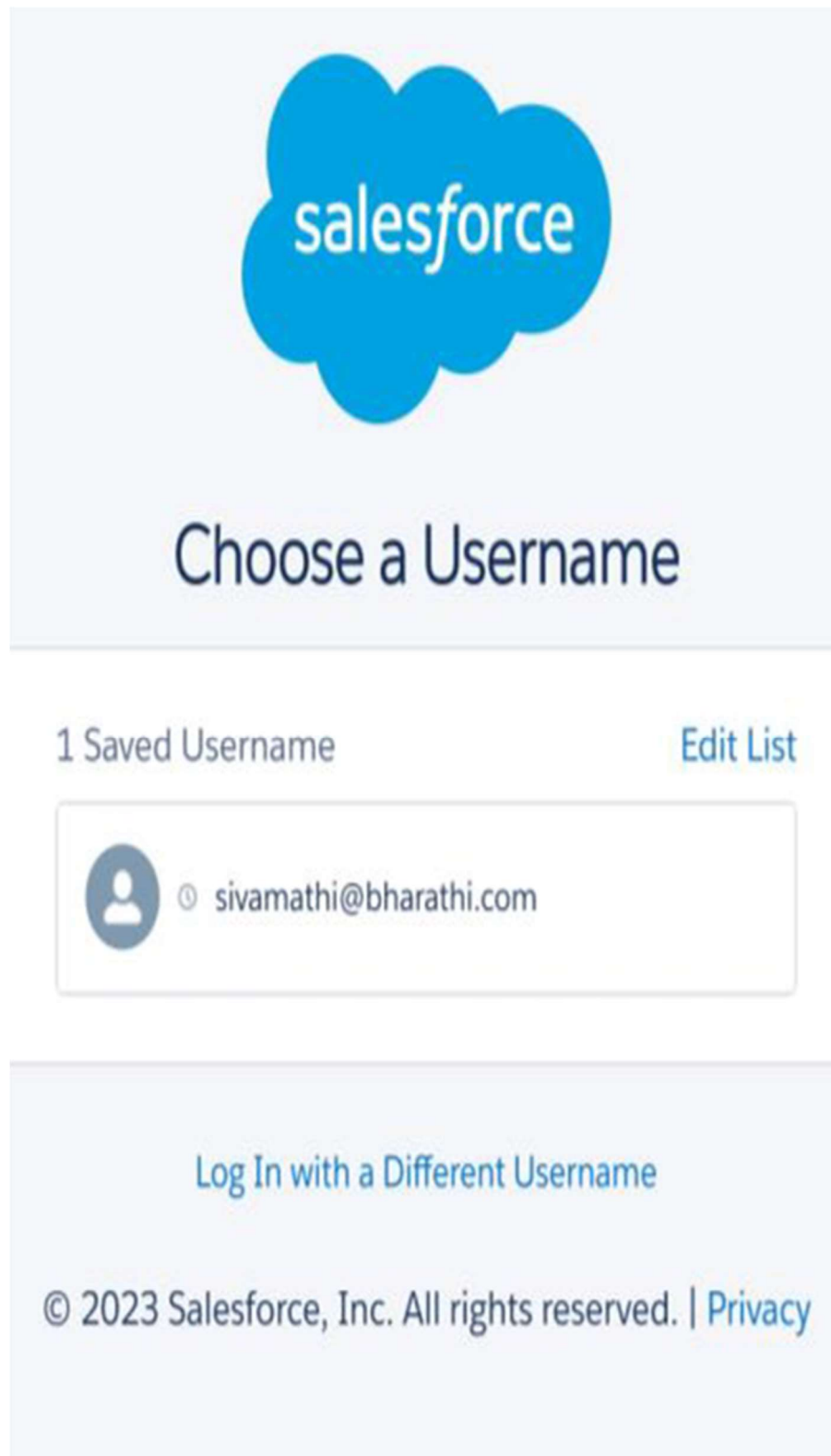
3.1 DATA MODEL

Object Name	Fields in the Object		
Object 1	Field label	Data type	
	Students	Phone	
	Parents	Area: Text	
Object 2	Field label	Data type	
	Schools	Roll up summary	
	Principal	Text	

3.2 ACTIVITY & SCREENSHOT

Milestone 1: Salesforce

Creation of salesforce Developer org.



Milestone 2: Object

(i) Creation of school object

In this object, we create the school identity for management.

ex: Label: School

Plural: Schools

(ii) Creation of student object

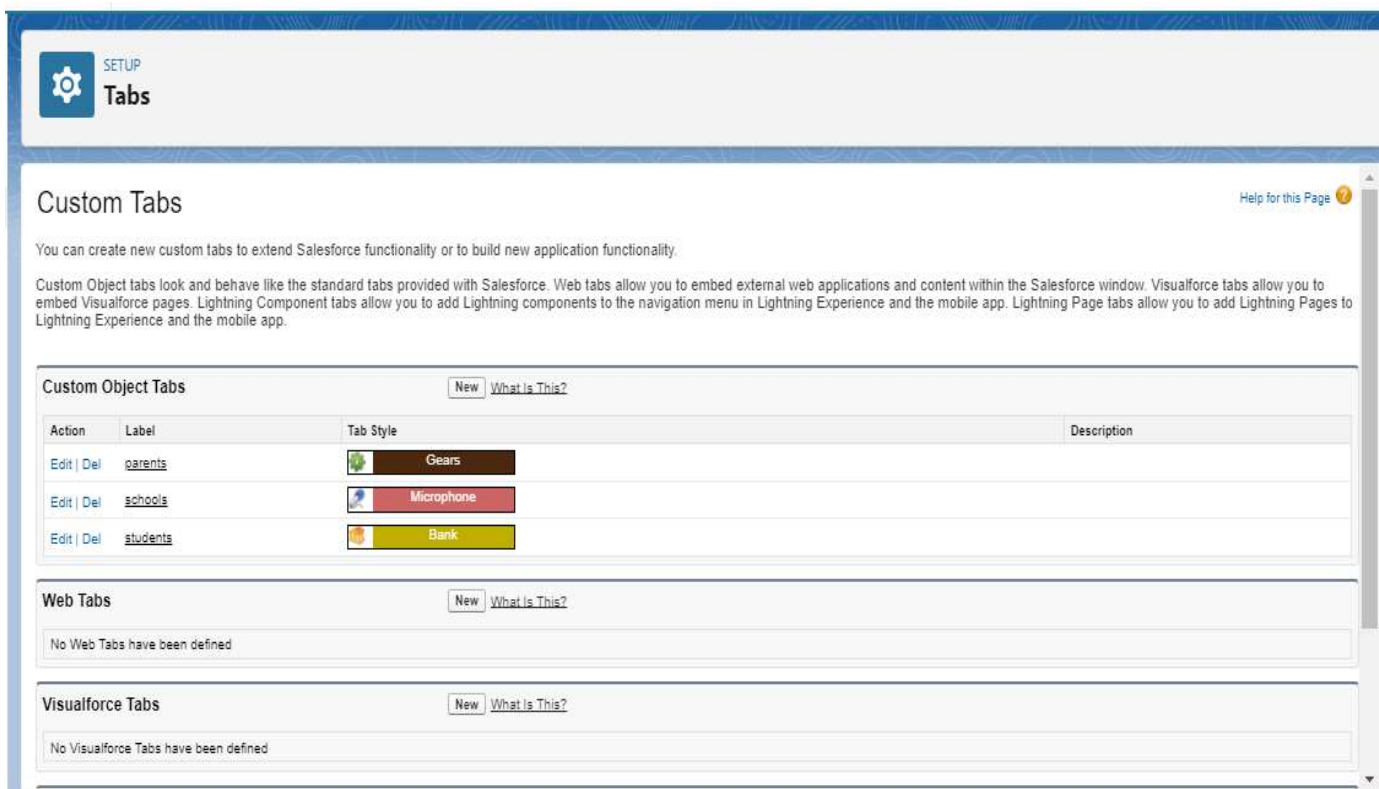
In the same way, create the student identity for schools.

ex : Label: Student

Plural: Students

(iii) Creation of parent object

In the same way, create the identity of parents belonging to their children.



The screenshot shows the Salesforce Setup interface for Custom Tabs. The header includes the 'SETUP' gear icon and the 'Tabs' label. The main section is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a descriptive paragraph about custom tabs. The interface is divided into three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section contains a table with three rows: 'parents' (Gears style), 'schools' (Microphone style), and 'students' (Blank style). Each row has 'Edit' and 'Del' links. The 'Web Tabs' and 'Visualforce Tabs' sections both show a message: 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively. Each section also has a 'New' button and a 'What Is This?' link.

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.

Action	Label	Tab Style	Description
Edit Del	parents	Gears	
Edit Del	schools	Microphone	
Edit Del	students	Blank	

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs [New](#) [What Is This?](#)

No Visualforce Tabs have been defined

Milestone 3: Lightning app

In this Lightning app, we create the school management as the record name.

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

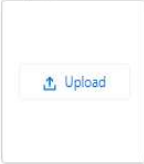
* App Name ⓘ

* Developer Name ⓘ

Description ⓘ

App Branding

Image ⓘ



Upload

Primary Color Hex Value ⓘ

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

SM

SCHOOL MANAGEMENT


Milestone 4: Fields and Relationship

Relationships are created by creating custom relationship fields on an object.

Fields & Relationships				
11 Items, Sorted by Field Label				
<div>Q Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
35	X35_c	Roll-Up Summary (COUNT student)		▼
6383418090	X6383418090_c	Phone		▼
CHENNAI	CHENNAI_c	Text Area(255)		▼
Created By	CreatedById	Lookup(User)		
DISTRICT	DISTRICT_c	Text Area(255)		▼
highest marks	highest_marks_c	Roll-Up Summary (MAX student)		▼
Last Modified By	LastModifiedById	Lookup(User)		
NO;18;ADV NAGAR K K THAZHLAI ,MADHAVRAM,	NO_18_ADV_NAGAR_K_K_THAZHLAI_MADHAVRAM_	Text Area(255)		▼
Owner	OwnerId	Lookup(User Group)		✓

Milestone 5: Profile

This is created for object permission fields and user permission.

 **SETUP**
Profiles

Profile

dr sivandhi adithanar

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](#) | [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](#) | [Enabled Custom Permissions](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	dr sivandhi adithanar		
User License	Salesforce	Custom Profile	✓
Description			
Created By	sivamathi dhanasekaran , 11/03/2023, 8:34 am	Modified By	sivamathi dhanasekaran , 21/04/2023, 9:38 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 [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	Order	Order Layout

Milestone 6: Permission Sets

This is created to give permission for Principal and Teacher users.

SETUP

Permission Sets

Step 1. Enter View Name

View Name

All Permission Sets

Created By

sivamathi.dhanasekaran

10/03/2023, 4:58 pm

Last Modified By

sivamathi.dhanasekaran

11/03/2023, 9:03 am

Clear All Rows

Step 2. Specify Filter Criteria

Setting

Operator

Value

equals

Add Row

Examples

Modify All Data equals False

Contact: Modify All equals True

Step 3. Select Columns to Display

Specify the columns to show in the list view. To set the columns, you can add profile details, user permissions, and object-level permissions.

Search

All

Find

Available Settings

Too many to display, refine search criteria

Selected Settings

Permission Set Label

Description

License

Add

Top

Up

Down

Milestone 7: Users

A user is anyone who logs in to Salesforce. Users or employees at our school or colleges such as personal staff, teachers, and principals who need access to our school's records. Every user in Salesforce has a user account.

SETUP
Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New View](#)


A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

<input type="checkbox"/> Action	Full Name *	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00d2w0000rk13ueatof4edawbyizb@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	dhanasekaran_sivabalan	sdhan	siva220@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	dhanasekaran_sivamathi	sdhan	sivamathi@bharathi.com		✓	System Administrator
<input type="checkbox"/> Edit	kovindan_padma	pkovi	padamapadama41@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	perumal_jagajothi	jperu	jagajothi1975@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	SADHASIVAM_DHANASEKARAN	dsadh	dhanasekaran1975@gmail.com		✓	MANALI HIGH SCHOOL
<input type="checkbox"/> Edit	sarathkumar_javanya	jsara	javanysarath58@gmail.com		✓	Identity User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2w0000rk13ueat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2w0000rk13ueat.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Milestone 8: Reports

A Report is created to exhibit a list of records related to students and parents which can be displayed in a graphical chart.

 **Report Types**

All Custom Report Types

With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.

View: All Custom Report Types [Edit](#) [Create New View](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

[New Custom Report Type](#)

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	<input checked="" type="checkbox"/>	autoproc	10/03/2023

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead: <https://trailblazer.me/id/sdhanasekaran7>

Team member 1: <https://trailblazer.me/id/nishm43>

Team Member 2: <https://trailblazer.me/id/pavithrapriya>

Team Member 3: <https://trailblazer.me/id/pramr18>

5 ADVANTAGES AND DISADVANTAGES

ADVANTAGES

- ❖ Increases the reputation of schools/colleges.
- ❖ It tracks and increases the number of students.
- ❖ Reduction in the cost of expenses.
- ❖ Improves the quality of educational services.
- ❖ History of work with each student.
- ❖ It helps educational organizations effectively manage and track leads resulting in improved enrolment numbers.

DISADVANTAGES

- ❖ Some uneducated people not able to understand or identify.

6. APPLICATIONS

Contract lifecycle management (CLM) automates and streamlines contract processes during key stages. These stages include initiation, authoring, process, workflow, negotiation and approval, execution, ongoing management and compliance, and contract renewal. In this, we create a user Id in the Salesforce login and a trailblaze.me log in for clear and thorough study of school or college.

7. CONCLUSION

Using CRM in the education industry provides organizations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement, and many more.

8. FUTURE SCOPE

The future of CRM is about which companies will be able to pivot to meet the changing needs and trends – driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations in future.