

NM SMARTINTERNZ PROJECT.

A CRM APPLICATION FOR SCHOOL/COLLEGE

CREATED BY III B Sc PHYSICS STUDENTS AT
GOVERNMENT ARTS COLLEGE UDUMALPET

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A CRM APPLICATION FOR SCHOOLS/COLLEGES.

1.INTRODUCTION

1.1.OVERVIEW

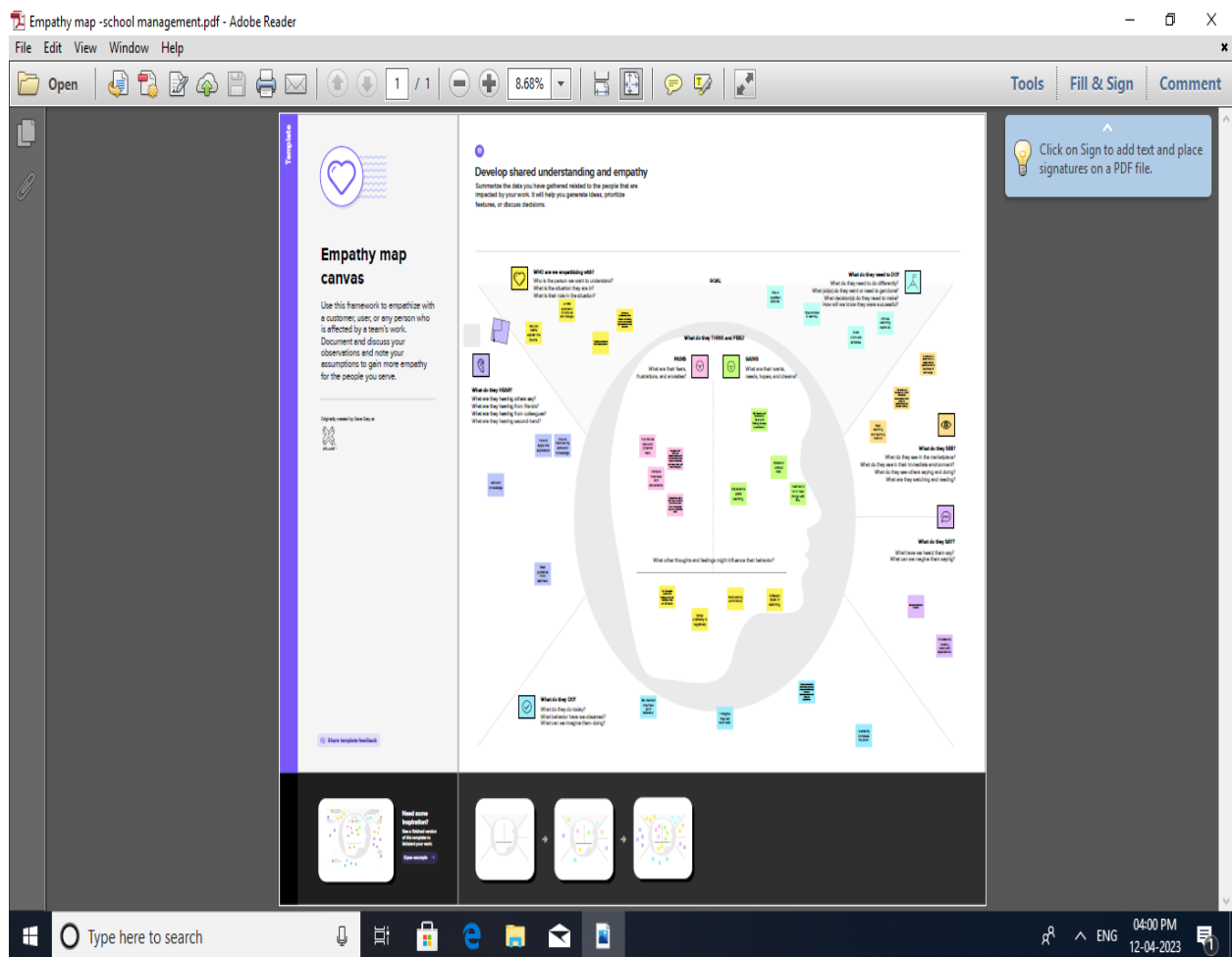
The project aim is to provide real time knowledge for all students who have basic knowledge of salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to salesforce. With the help of this project they will gain knowledge and can include it into their resume as well. A CRM is a system that helps schools manage the entire lifecycle of a potential customer -

sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access place.

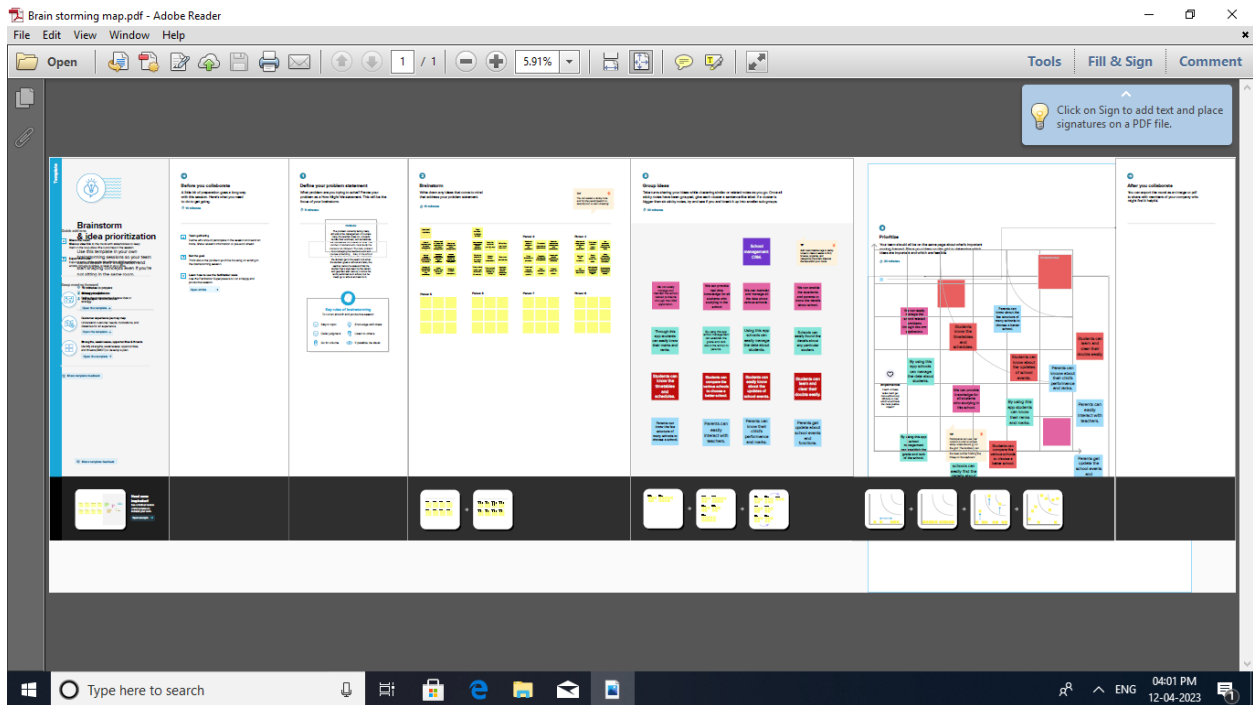
1.2.PURPOSE

- **What is real time salesforce project.**
- **Object & Relationships**
- **Profile**
- **Users**
- **Reports**
- **Permission sets**
- **Reports**

2.1. Empathy



2.2.Brainstorming map



3.RESULT

3.1.Data Model

In this SCHOOL MANAGEMENT CRM PROJECT we created three objects viz, SCHOOL , STUDENT and PARENTS. And we had created field label and data along with this objects and also we created specific icons for this objects. We enclosed the screenshots of objects we created such as follows.

OBJECT NAME : SCHOOL

The screenshot shows the Salesforce Setup interface for the 'school' object. The browser address bar displays the URL: `gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Gn5r/Details/view`. The page title is 'school' and the breadcrumb is 'SETUP > OBJECT MANAGER'. The left sidebar contains a list of configuration options: 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 main content area is titled 'Details' and includes a description field, API Name (school__c), Custom checkbox, Singular Label (school), Plural Label (schools), Enable Reports checkbox, Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The bottom of the image shows the Windows taskbar with the search bar and various application icons.

school | Salesforce

gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Gn5r/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

school

Details

Edit Delete

Description

API Name
school__c

Custom

Singular Label
school

Plural Label
schools

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Type here to search

02:16 PM
12-04-2023

OBJECT NAME : STUDENT

The screenshot shows the Salesforce Object Manager interface for the 'students' object. The browser address bar displays the URL: `gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Gn61/Details/view`. The page title is 'students'. 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, Related Lookup Filters, Search Layouts, and List View Button Layout. The 'Details' section is active, showing the following information:

Field	Value
Description	
API Name	students__c
Custom	✓
Singular Label	students
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 'Details' section contains 'Edit' and 'Delete' buttons. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

OBJECT NAME : PARENTS

The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The browser address bar displays the URL: `gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HW1y/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, Related Lookup Filters, Search Layouts, and List View Button Layout. The 'Details' section is active, showing the following information:

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 'Details' section contains 'Edit' and 'Delete' buttons. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

OBJECT NAME	FIELDS IN THE OBJECT	
SCHOOL	FIELD LABEL	DATA TYPE
	1.Address	Text area
	2.District	Text area
	3.State	Text area
	4.School	Text area
	5.Phone number	Phone
	6.Number of students	Roll up summary
	7.Highest marks	Roll up summary
STUDENT	FIELD LABEL	DATA TYPE
	1.Phone number	Phone
	2.School	Master detail relationship
	3.Results	Picklist
	4.Class	Number

PARENT	FIELD LABEL	DATA TYPE
	1.Parent address	Text area
	2.Parent number	Phone

3.2. ACTIVITY & SCREENSHOT

1.OBJECT

Salesforce objects are database tables that permit us to store data that is specific to an organization. Salesforce objects are of two types : Standard objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts ,reports, dashboards, etc.

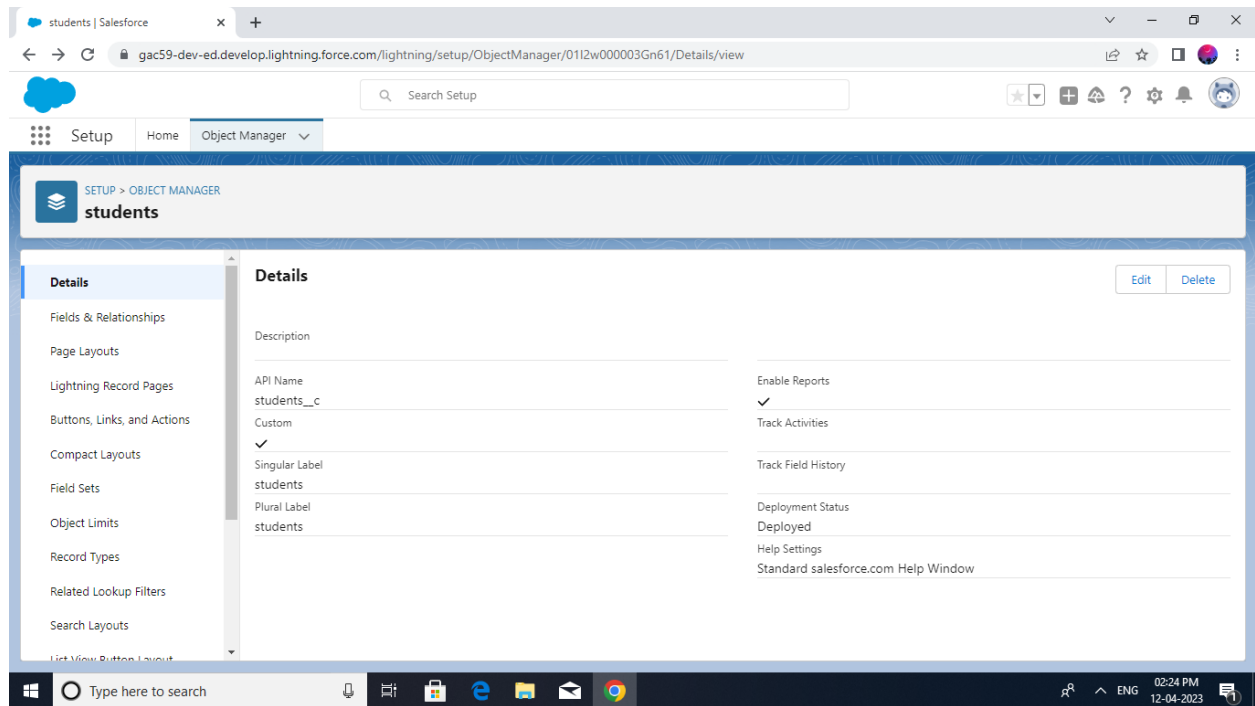
ACTIVITY 1 : SCHOOL OBJECT

The screenshot shows the Salesforce Setup interface for the 'school' object. The browser address bar displays the URL: `gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Gn5r/Details/view`. The page title is 'school | Salesforce'. The navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options: 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 main content area is titled 'Details' and contains the following information:

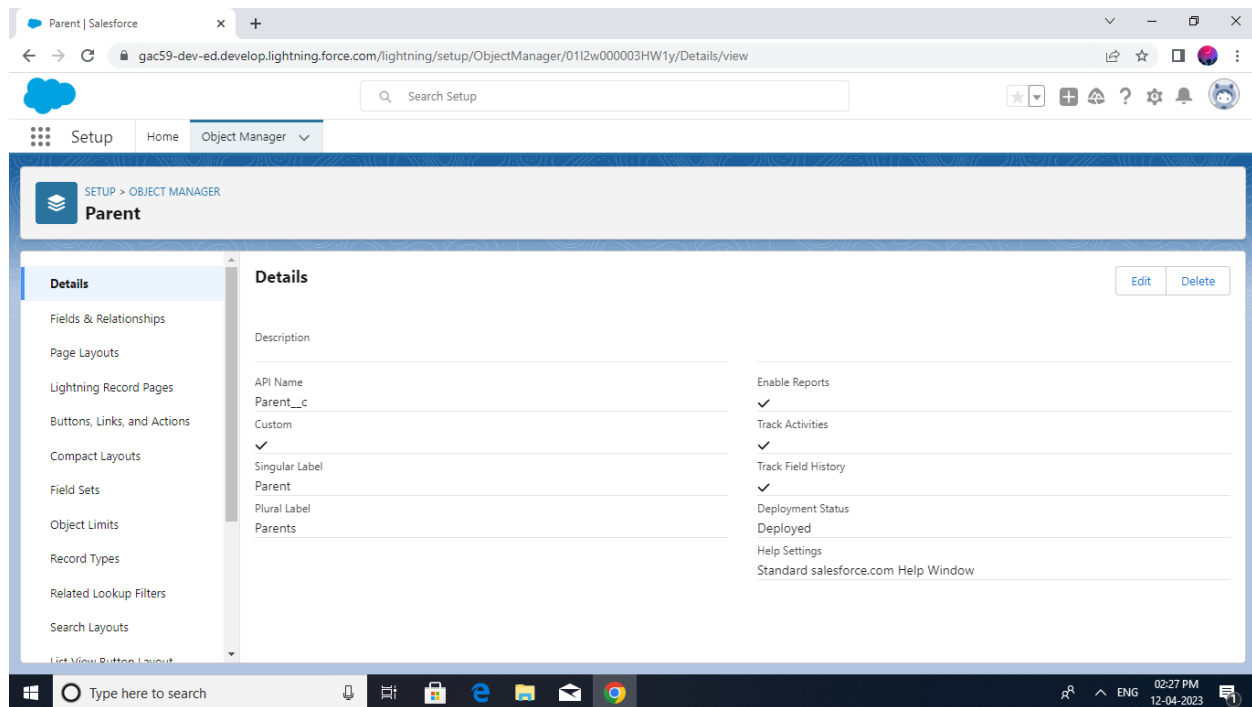
Details	
Description	
API Name	school__c
Custom	✓
Singular Label	school
Plural Label	schools
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the image shows the Windows taskbar with the search bar and several application icons. The system clock indicates the time is 02:16 PM on 12-04-2023.

ACTIVITY 2 : STUDENT OBJECT

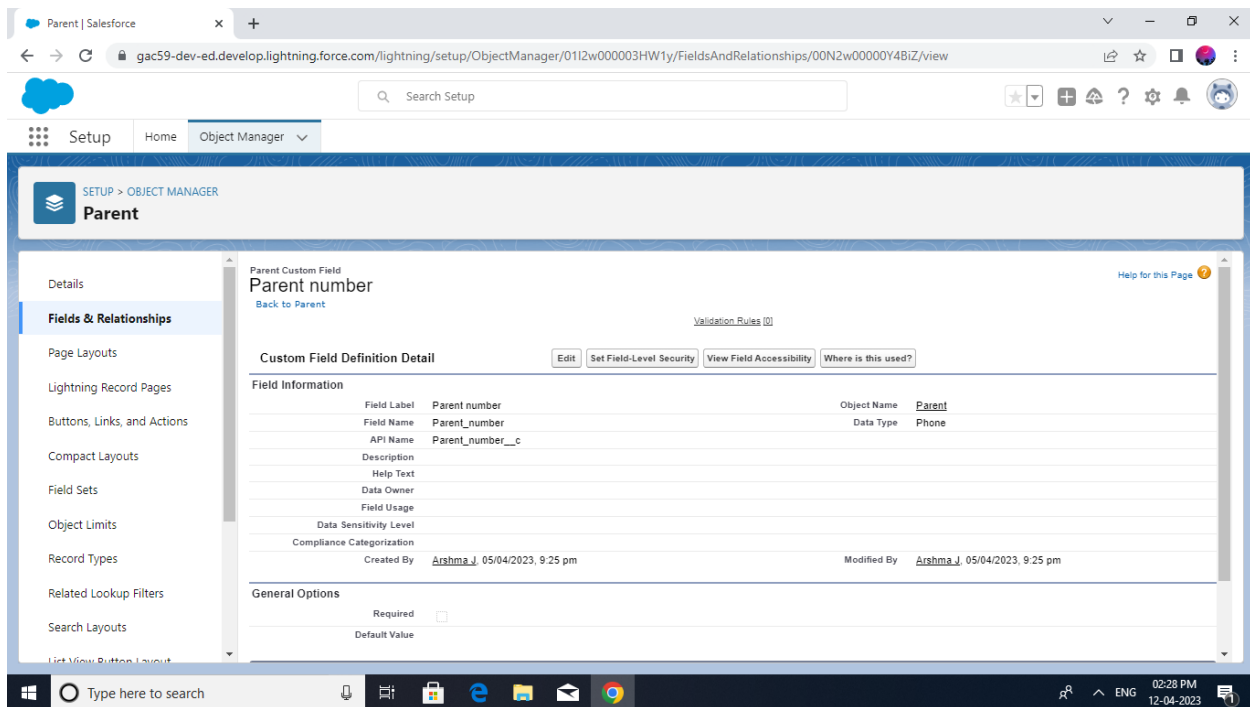


ACTIVITY 3 : PARENT OBJECT



2.LIGHTNING APP

Apps in salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs.



3.FIELDS AND RELATIONSHIP

An object relationship in salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

I included the screenshots of few of the fields & relationships which I created for three objects mentioned above one by one.

The image displays two screenshots of the Salesforce Object Manager interface, showing the configuration of custom fields for two different objects: 'Address' and 'school'.

Top Screenshot: Address Custom Field

The interface shows the 'Address' custom field configuration for the 'school' object. The field is a Text Area.

Field Information	
Field Label	Address
Field Name	Address
API Name	Address__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Arshma J. 13/03/2023, 12:31 pm
Modified By	Arshma J. 13/03/2023, 12:31 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Bottom Screenshot: school Custom Field

The interface shows the 'school' custom field configuration for the 'school' object. The field is a Text Area.

Field Information	
Field Label	school
Field Name	school
API Name	school__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Arshma J. 13/03/2023, 11:50 am
Modified By	Arshma J. 13/03/2023, 11:50 am

General Options

Required	<input type="checkbox"/>
Default Value	

school | Salesforce

gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Gn5r/FieldsAndRelationships/00N2w00000V14tv/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

school

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

school Custom Field

District

Back to school

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	District	Object Name	school
Field Name	District	Data Type	Text Area
API Name	District__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Arshma J. 13/03/2023, 12:33 pm	Modified By	Arshma J. 13/03/2023, 12:33 pm

General Options

Required ☐

Default Value

school | Salesforce

gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Gn5r/FieldsAndRelationships/00N2w00000Y0hDu/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

school

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

school Custom Field

Highest Marks

Back to school

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Highest Marks	Object Name	school
Field Name	Highest_Marks		
API Name	Highest_Marks__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Arshma J. 19/03/2023, 8:10 am	Modified By	Arshma J. 19/03/2023, 8:10 am

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	MAX
Summarized Object	students		
Field to Aggregate	students_Marks		

Parent | Salesforce

gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HW1y/FieldsAndRelationships/00N2w00000Y4BzI/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Parent

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

Parent Custom Field

Parent number

Back to Parent

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Parent number	Object Name	Parent
Field Name	Parent_number	Data Type	Phone
API Name	Parent_number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Arshma J. 05/04/2023, 9:25 pm	Modified By	Arshma J. 05/04/2023, 9:25 pm

General Options

Required ☐

Default Value

Parent | Salesforce

gac59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HW1y/FieldsAndRelationships/00N2w00000Y4BzI/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Parent

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

Parent Custom Field

Parent number

Back to Parent

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Parent number	Object Name	Parent
Field Name	Parent_number	Data Type	Phone
API Name	Parent_number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Arshma J. 05/04/2023, 9:25 pm	Modified By	Arshma J. 05/04/2023, 9:25 pm

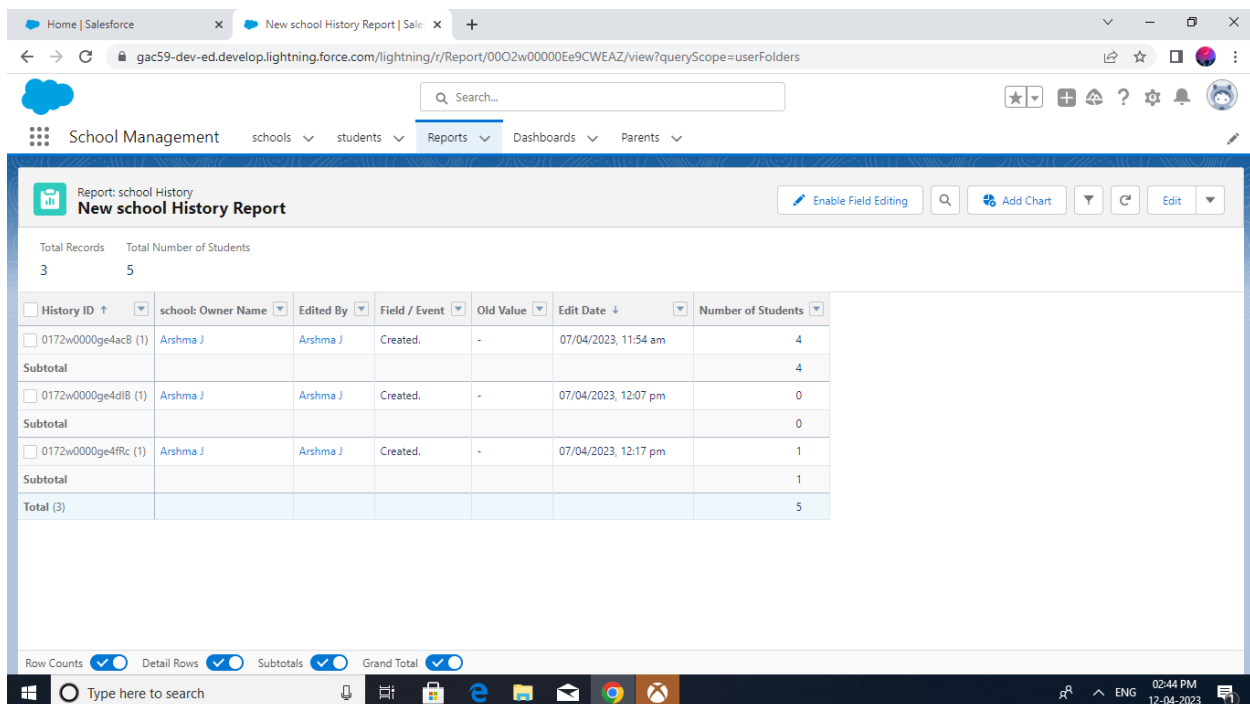
General Options

Required ☐

Default Value

4.PROFILE

A profile is a group of / collection of settings and permissions that define what a user can do in salesforce. A profile controls “object permissions, field permissions, user permissions, tab settings, app settings, apex class access, visual force page access, page layouts, record types, login hours & login IP ranges.

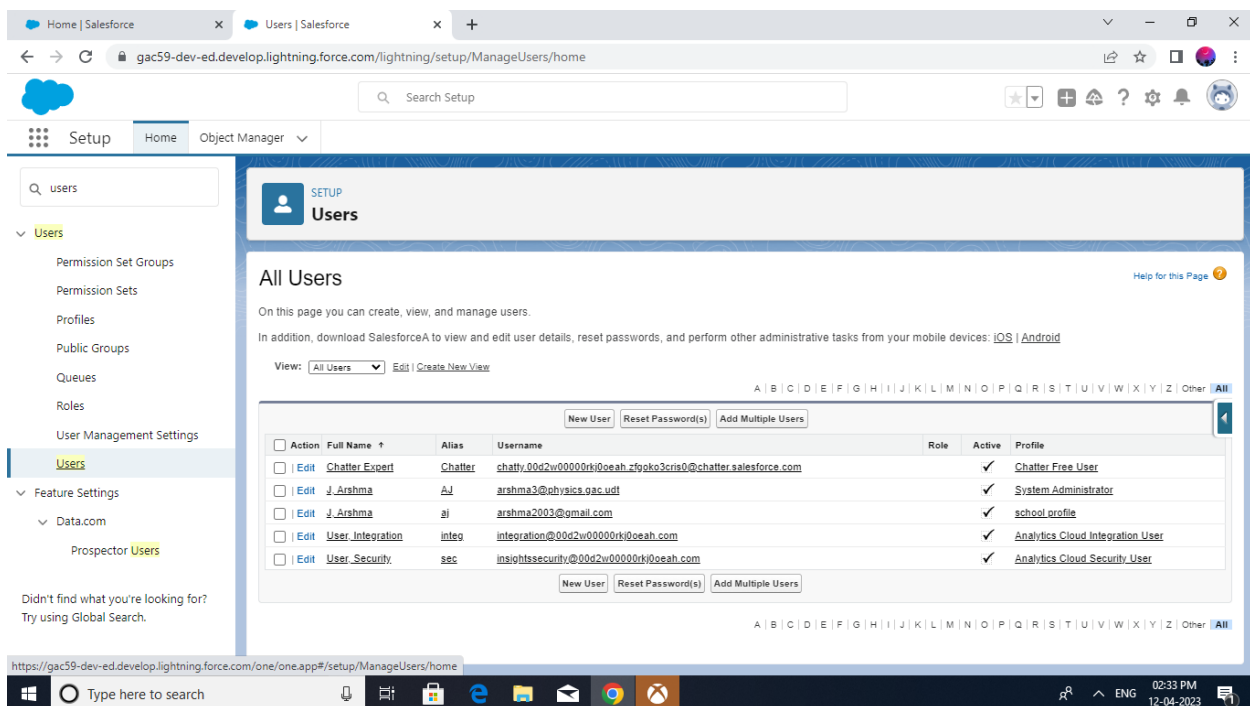


The screenshot shows a Salesforce interface with a report titled "New school History Report". The report displays a table with columns: History ID, school: Owner Name, Edited By, Field / Event, Old Value, Edit Date, and Number of Students. The table contains three data rows, each with a subtotal, and a grand total row. The data indicates that three schools were created, with a total of 5 students.

History ID	school: Owner Name	Edited By	Field / Event	Old Value	Edit Date	Number of Students
0172w0000ge4acB (1)	Arshma J	Arshma J	Created.	-	07/04/2023, 11:54 am	4
Subtotal						4
0172w0000ge4dIB (1)	Arshma J	Arshma J	Created.	-	07/04/2023, 12:07 pm	0
Subtotal						0
0172w0000ge4fRc (1)	Arshma J	Arshma J	Created.	-	07/04/2023, 12:17 pm	1
Subtotal						1
Total (3)						5

5.USERS

A user is anyone who logs in to salesforce. Users are member of school such as principal, teachers, students who need to access to the school's record. Every user in salesforce has a user account.



6.PERMISSION SETS

A permission set is a collection of settings and permissions that give users

access to various tools and functions. Permission sets extend user's functional access without changing their profiles.

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Permission Sets' page. Both screenshots show the left-hand navigation menu with 'Users' selected, and the main content area displaying the 'Permission Set Overview' and 'Apps' sections.

Top Screenshot: Principal permission

- Permission Set Overview:**
 - Description: Principal permission
 - License: (blank)
 - Session Activation Required: ☐
 - Last Modified By: Arshma J. 05/04/2023, 8:55 pm
 - API Name: Principal_permission
 - Namespace Prefix: (blank)
 - Created By: Arshma J. 05/04/2023, 8:55 pm
- Apps:**
 - Assigned Apps:** Settings that specify which apps are visible in the app menu.
 - Assigned Connected Apps:** Settings that specify which connected apps are visible in the app menu.
 - Object Settings:** Permissions to access objects and fields, and settings such as tab availability.
 - App Permissions:** Permissions to perform app-specific actions, such as "Manage Call Centers".
 - App Class Access:** Permissions to execute App classes.

Bottom Screenshot: Teacher Permission

- Permission Set Overview:**
 - Description: Teacher Permission
 - License: (blank)
 - Session Activation Required: ☐
 - Last Modified By: Arshma J. 05/04/2023, 8:50 pm
 - API Name: Teacher_Permission
 - Namespace Prefix: (blank)
 - Created By: Arshma J. 05/04/2023, 8:50 pm
- Apps:**
 - Assigned Apps:** Settings that specify which apps are visible in the app menu.
 - Assigned Connected Apps:** Settings that specify which connected apps are visible in the app menu.
 - Object Settings:** Permissions to access objects and fields, and settings such as tab availability.
 - App Permissions:** Permissions to perform app-specific actions, such as "Manage Call Centers".
 - App Class Access:** Permissions to execute App classes.

7.REPORTS

A report is a list of records that meet the criteria you define. It's displayed in salesforce in rows and columns , and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public , hidden, or shared, and can be set to read-only or read/write.

We created reports for few schools and students and parents.

Home | Salesforce x Reports | Salesforce x +

gac59-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

School Management schools students Reports Dashboards Parents

Reports

Recent 14 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New school History Report		Private Reports	Arshma J	5/4/2023, 10:53 pm	
Created by Me	New Activities with Parents Report		Private Reports	Arshma J	5/4/2023, 10:48 pm	
Private Reports	New schools Report		Private Reports	Arshma J	7/4/2023, 12:14 pm	
Public Reports	New schools with students Report		Private Reports	Arshma J	5/4/2023, 10:39 pm	
All Reports	New schools Report		Private Reports	Arshma J	5/4/2023, 10:41 pm	
FOLDERS	ACCOUNT REPORT		Private Reports	Arshma J	7/4/2023, 11:27 am	
All Folders	Copy of New Accounts Report		Private Reports	Arshma J	7/4/2023, 11:18 am	
Created by Me	New File and Content Report Report		Private Reports	Arshma J	5/4/2023, 10:52 pm	
Shared with Me	New Documents Report		Private Reports	Arshma J	5/4/2023, 10:51 pm	
FAVORITES	New Reports Report		Private Reports	Arshma J	5/4/2023, 10:50 pm	
All Favorites	New Activities with schools Report		Private Reports	Arshma J	5/4/2023, 10:46 pm	
	New Users Report		Private Reports	Arshma J	5/4/2023, 10:43 pm	

Type here to search

02:45 PM 12-04-2023

Home | Salesforce x SNV SCHOOL | Salesforce x +

gac59-dev-ed.develop.lightning.force.com/lightning/r/school_c/a002w00000bqTzxAAE/view

School Management schools students Reports Dashboards Parents

school SNV SCHOOL

New Contact Edit New Opportunity

Related Details

school Name	SNV SCHOOL	Owner	Arshma J
school	SRI NATARAJ VENKATALAKSHMI HIGHER SECONDORY SCHOOL		
Address	MAIN ROAD, ELAYAMUTHUR.		
District	TIRUPUR		
State	TAMIL NADU		
Phone Number	9876543210		
Number of Students	0		
Highest Marks			

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Type here to search

02:45 PM 12-04-2023

Home | Salesforce x JAHANGEER | Salesforce x +

gac59-dev-ed.develop.lightning.force.com/lightning/r/Parent_c/a032w0000VwpyqAAB/view

Search...

School Management schools students Reports Dashboards Parents

Parent JAHANGEER

New Contact Edit New Opportunity

Related Details

Parent Name JAHANGEER Owner Arshma J

Parent Address ANNA NAGAR ,ELAYAMUTHUR.

Parent number 9566560477

Created By Arshma J, 07/04/2023, 12:24 pm Last Modified By Arshma J, 07/04/2023, 12:24 pm

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Home | Salesforce x YOGARAJ | Salesforce x +

gac59-dev-ed.develop.lightning.force.com/lightning/r/students_c/a012w00001D0gUoAAJ/view

Search...

School Management schools students Reports Dashboards Parents

students YOGARAJ

New Contact Edit New Opportunity

Related Details

students Name YOGARAJ

Phone Number 9807654321

Phone Number 9677578043

school AS SCHOOL

Results Pass,

Class 10

Marks 437

Created By Arshma J, 07/04/2023, 11:58 am Last Modified By Arshma J, 07/04/2023, 11:58 am

4. Trailhead profile public URL

1.ARSHMA J(LEAD)-

<https://trailblazer.me/id/arshj6>

2.AKILAN-

<https://trailblazer.me/id/akilan2003>

3.BALAMURUGAN -

<https://trailblazer.me/id/balas181>

4.ASWIN KUMAR-

<https://trailblazer.me/id/pkumar4591>

5. Advantages & Disadvantages

ADVANTAGES :

With the increase in complexities, educational institutes have also changed their approach to operate. These organizations embraced CRM for educational institutions to enhance student experiences , streamline operations, track and maintain information to develop a

deeper understanding of their processes, and extend their outreach.

It helps to improve student admissions lifecycle. It keeps alumni information safe and accessible.

related to student enrolment and assigned fee structure. This helps your administrative department avoid discrepancies in the payment process while notifying students about their due fees.

DISADVANTAGES :

- A costly project.**
- Loss of collected information or records.**
- Not suitable for every business.**

- **It eliminates the human element.**
- **Can be accessed by the third party.**

6.APPLICATIONS

- **Improving interactions and communications.**
- **Collecting data for storing and marketing.**
- **Streamlining internal sales processes.**
- **It helps owners easily track all communication and nurture relationships with their leads and clients.**

- **A CRM replaces the multitude of spreadsheets, databases and apps that many businesses patch together to track client data.**

7.CONCLUSION

Customer relationship management enables a school to align its management details, publishing their school, and maintain students data and to establish their better service and to know the students and parents about their performance easily.

8.FUTURE SCOPE

- Voice and Conversation UI.
- Conversational tools.
- Artificial intelligence.
- Automation.
- Analytics.
- Mobile and social CRM.
- Usability.
- Integration.
- Self-service CRM.
- Customer experience.
- Personalization.
- Internet of things.
- Become more powerful to support customers.

