



A CRM APPLICATION FOR SCHOOLS / COLLEGES

A group project submitted to Smart Internz and Bharathidasan University, Tiruchirappalli

in partial fulfillment of the requirements for the award of the Degree of

Bachelor of Science in Mathematics

by

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A CRM APPLICATION FOR SCHOOL / COLLEGES

Introduction

1.1 Overview:

This Project helps you to maintain and manage the College related problems which further can be modified based on the requirements

College:

** This section would provide an overview of the academic programs offered by the college, including majors, minors, and certificates, as well as the departments and schools that offer these programs.*

** This section would provide information about the college's faculty and staff, including their areas of expertise, research interests, and teaching experience.*

**Students*

**Parents*

**Examination*

**Result*

**Revaluation*

**Revaluation Result*

2. Problem Definition & Design Thinking:

2.1 Empathy Map:

An empathy map is a visual tool used to better understand a specific person or customer's experience, thoughts, feelings, and behaviors in a particular situation. It is often used in design thinking, marketing, and

customer service to gain a deeper understanding of user needs and create more effective solutions.

An empathy map typically consists of four quadrants, each representing a different aspect of the user's experience:

1. **Says:** *This quadrant focuses on the user's verbal communication, including what they say, how they say it, and what they don't say.*
2. **Thinks:** *This quadrant explores the user's thoughts, beliefs, and attitudes, including their fears, hopes, and motivations.*
3. **Does:** *This quadrant looks at the user's behaviors, including their actions, body language, and habits.*
4. **Feels:** *This quadrant delves into the user's emotions, including their feelings, moods, and reactions.*

Says

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

I hope my application stands out among the others

I wish someone could guide me through the application process step-by-step

I am excited to try out this new feature



Wants to receive financial aid and scholarship information to help offset the cost of tuition

Think about future goals and career aspirations

Improve communication and engagement with students and parents

Hopes to make a good impression through essays, interviews, and recommendations

College Management

Monitors key metrics (e.g., attendance, grades, behavior) to identify trends and areas for improvement



Wondering how to balance personalized outreach with limited time and resources



Monitors student progress and identifies areas where additional support and resources may be needed

Fear of being rejected or judged based on their application materials

Struggles to balance academic work, extracurricular activities, and application requirements

Anxiety about the academic and social expectations of college life

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?

2.2 Ideation & Brainstorming Map:

An ideation and brainstorming map is a visual tool that helps individuals or teams generate and organize ideas around a central topic or problem. It typically consists of a central idea or problem statement that is surrounded by clusters of related ideas, which are then grouped into categories or themes. The map helps to stimulate creativity and encourage exploration of new ideas by allowing for free-flowing brainstorming and providing a structure to organize and prioritize the generated ideas. The map can be used in various fields, including business, education, design, and innovation, to facilitate ideation and problem-solving.

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			Person 2			Person 3			Person 4		
Software for admissions process.	Protection for student's date's	To improved student experience	To increase communication between students and parents	Software for students income details	To encourage students in extra-curricular activities	Maintains performance in clubs	Provide revaluation column	Student's dates should be digitalize	Software for maintaining semester wise results	Exam revaluation result be connecting digital valuation system	Software for department library
Software for semester exams	Software for percentage	Software for ranklist	Encourage students to participate in various conferences, etc.	To encourage students for higher studies in India	To encourage students for higher studies in abroad	Maintain separate column for arrear details	Software for preparing placement examinations	Software for maintaining alumni details	Software for downloading digital book	Encourage students to participate in NSS	Conduct PTM

RESULT

3.1 Data Model:

	<i>Gender</i> <i>Examination Name</i> <i>Email Address</i> <i>Date of Birth</i> <i>Community</i> <i>Centre Code</i> <i>Arrear Paper</i> <i>Address of Communication</i>	<i>Number</i> <i>Text</i> <i>Picklist</i> <i>Text</i> <i>Text</i> <i>Date</i> <i>Text</i> <i>Number</i> <i>Text</i> <i>Text</i>
S.No	<i>Sub.Code</i>	<i>Subject Title</i>
1	<i>Text</i>	<i>Text</i>
2	<i>Text</i>	<i>Text</i>
3	<i>Text</i>	<i>Text</i>
4	<i>Text</i>	<i>Text</i>
5	<i>Text</i>	<i>Text</i>
6	<i>Text</i>	<i>Text</i>
7	<i>Text</i>	<i>Text</i>
8	<i>Text</i>	<i>Text</i>
<i>Result</i>	<i>Result Name</i> <i>Register Number</i> <i>Date of Birth</i>	<i>Text</i> <i>Text</i> <i>Date</i>
<i>Revaluation</i>	<i>College Name</i> <i>Centre Code</i> <i>Name of Candidate</i> <i>Register Number</i> <i>Result Copy Enclosed</i> <i>Revaluation Name</i>	<i>Text</i> <i>Number</i> <i>Text</i> <i>Text</i> <i>Text</i> <i>Text</i>

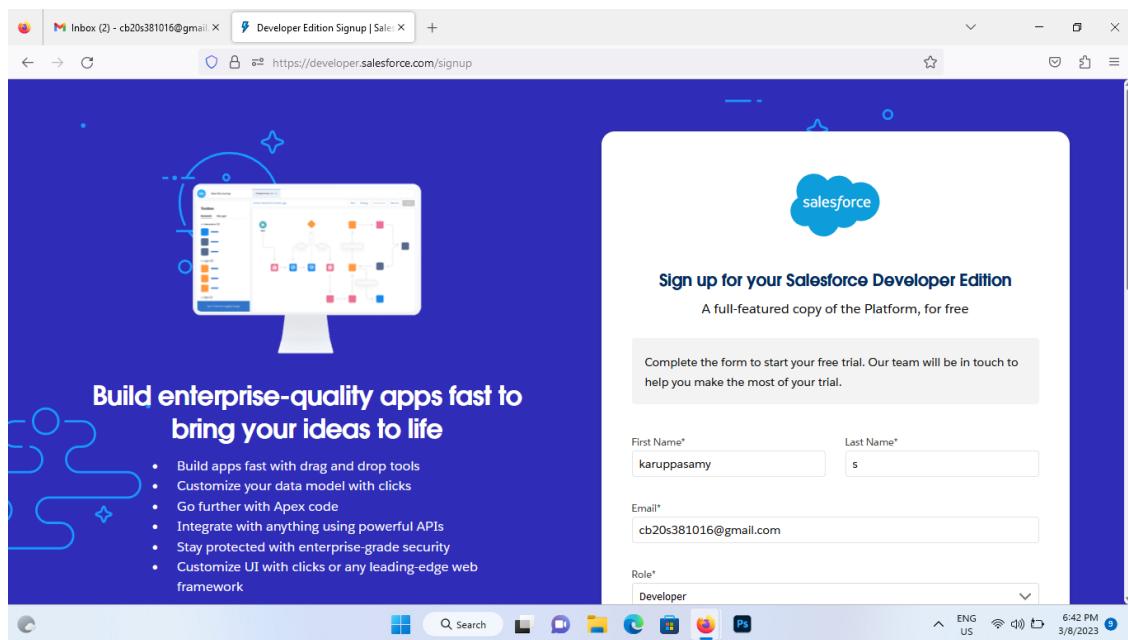
3.2 Activity & Screenshot:

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer
 - c. Company : College Name
 - d. County : India
 - 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

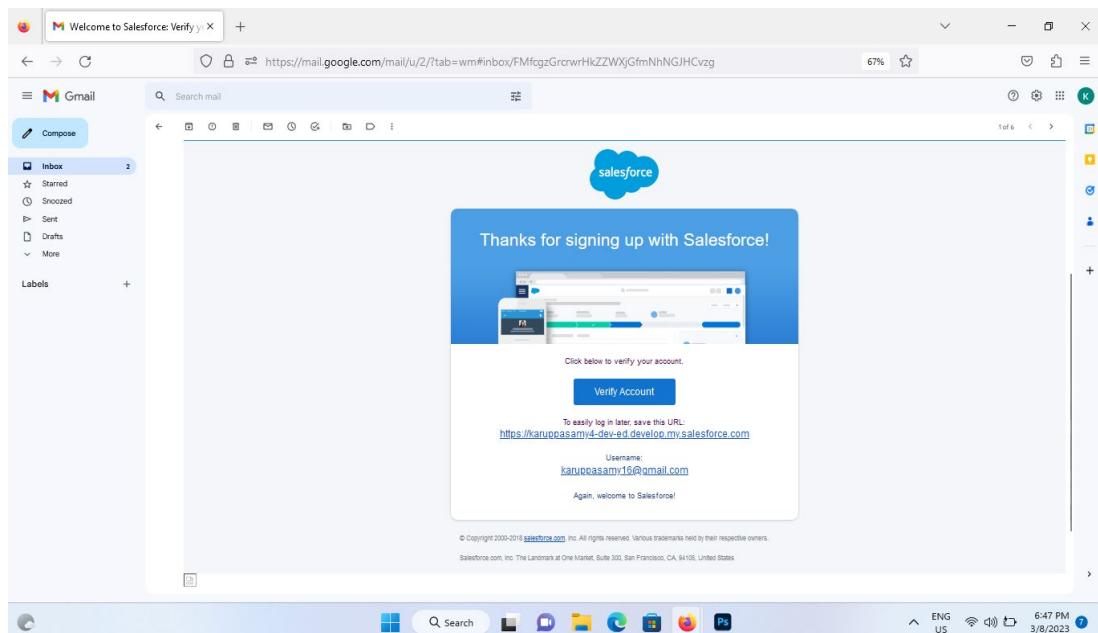
Click on sign up after filling these.



Fig(1)

Account Activation

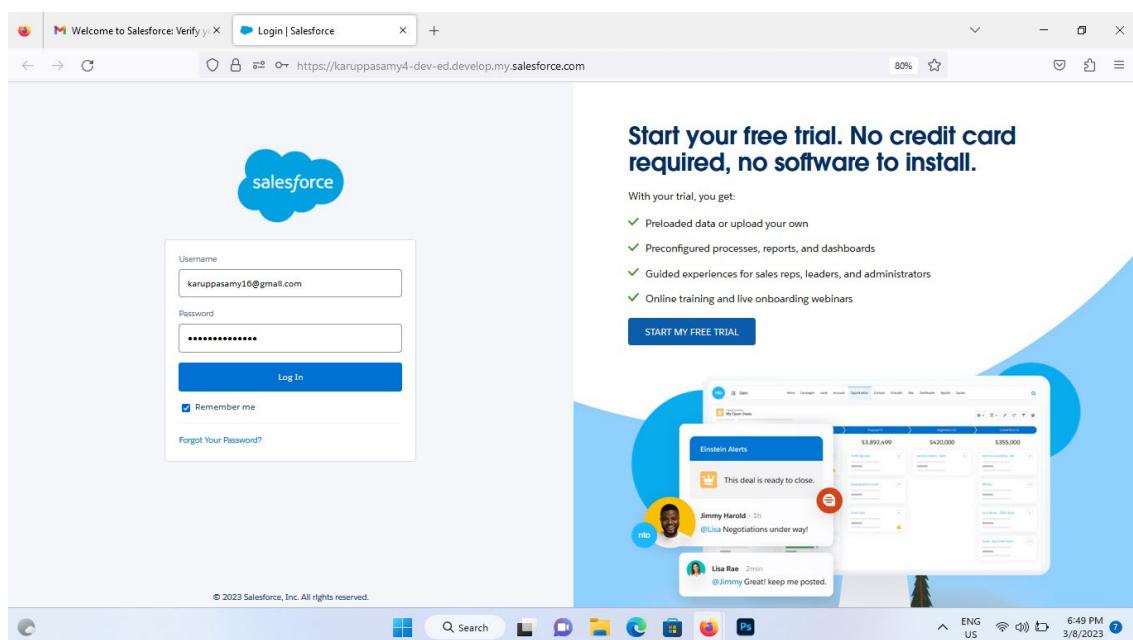
Go to the inbox of the email that you used while signing up Click on the verify account to activate your account. The email may take 5-10mins, as



Fig(2)

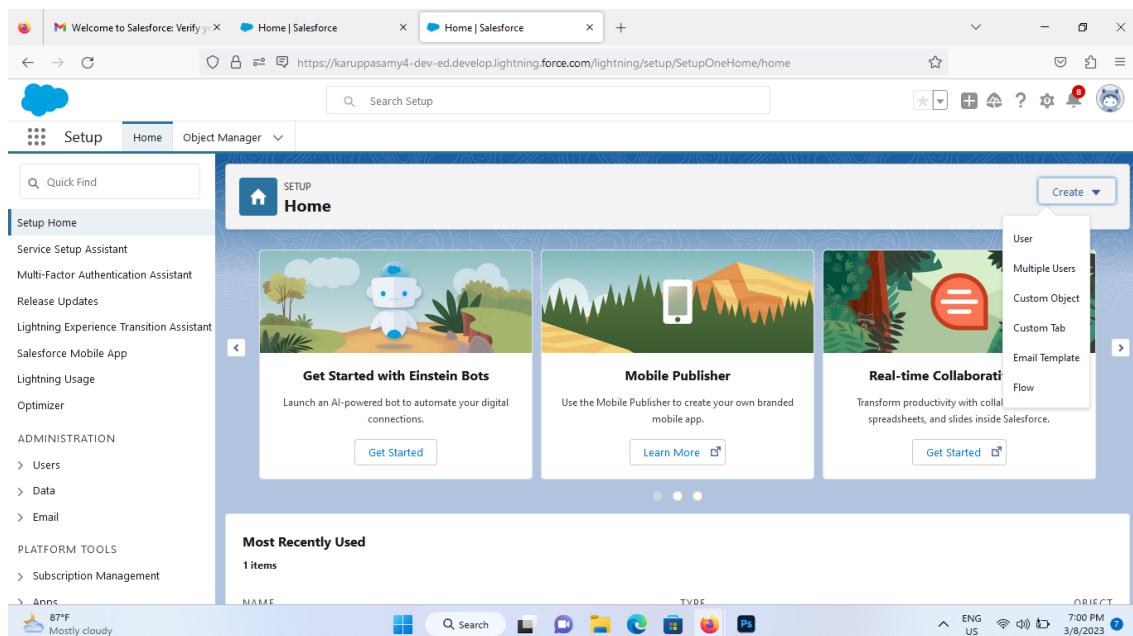
Login To Your Salesforce Account

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



Fig(3)

3. After login this is the home page which you will See



Fig(4)

Object

Salesforce objects are database tables that permit you 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.

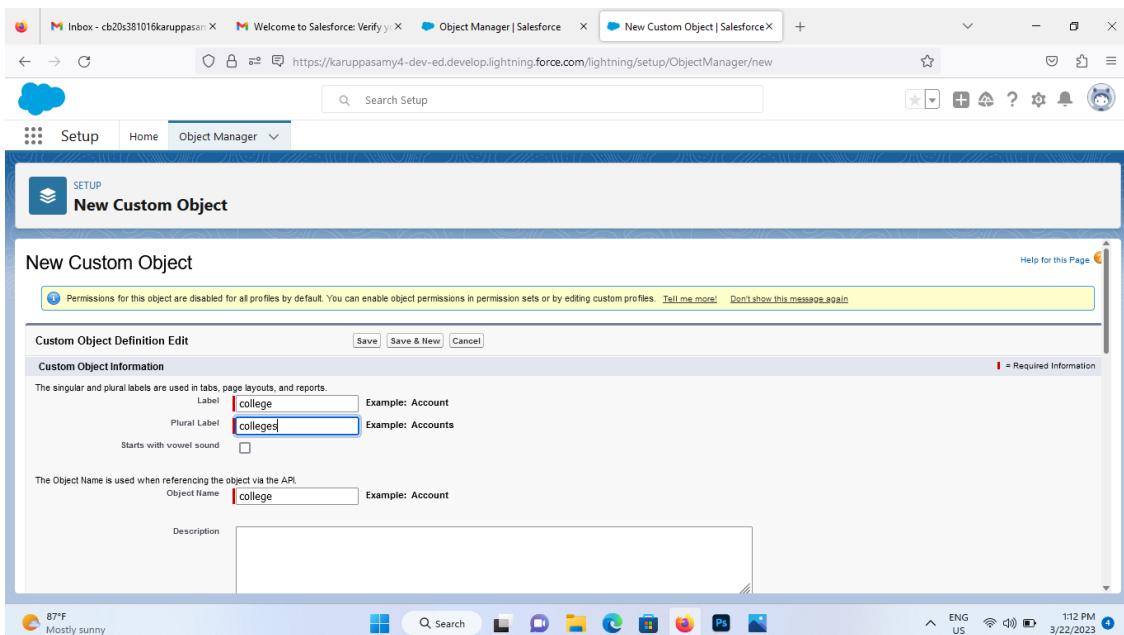
Creation of College Object

Creation of Objects for College Management:

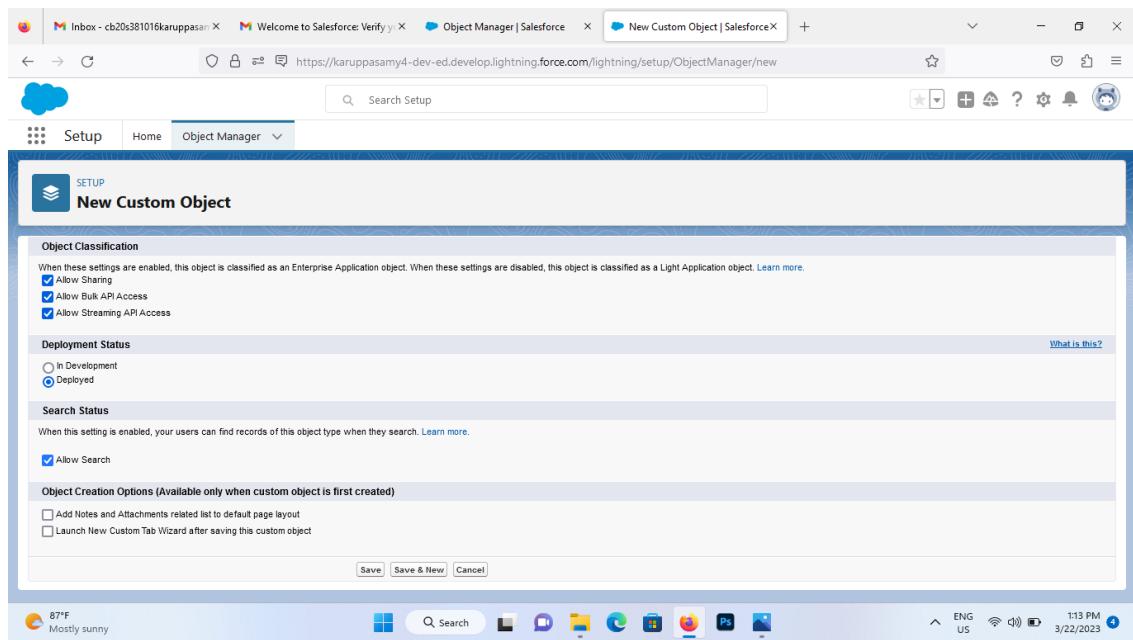
For this school management we need to create 6 objects i.e college, parents and students, examination, result, revaluation. The below steps will assist you in creating those objects.

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: College

- * **Plural Label: Colleges**
- * **Record Name: Colleges Name**
- * **Check the Allow Reports checkbox**
- * **Check the Allow Search checkbox**
- * **Click Save.**



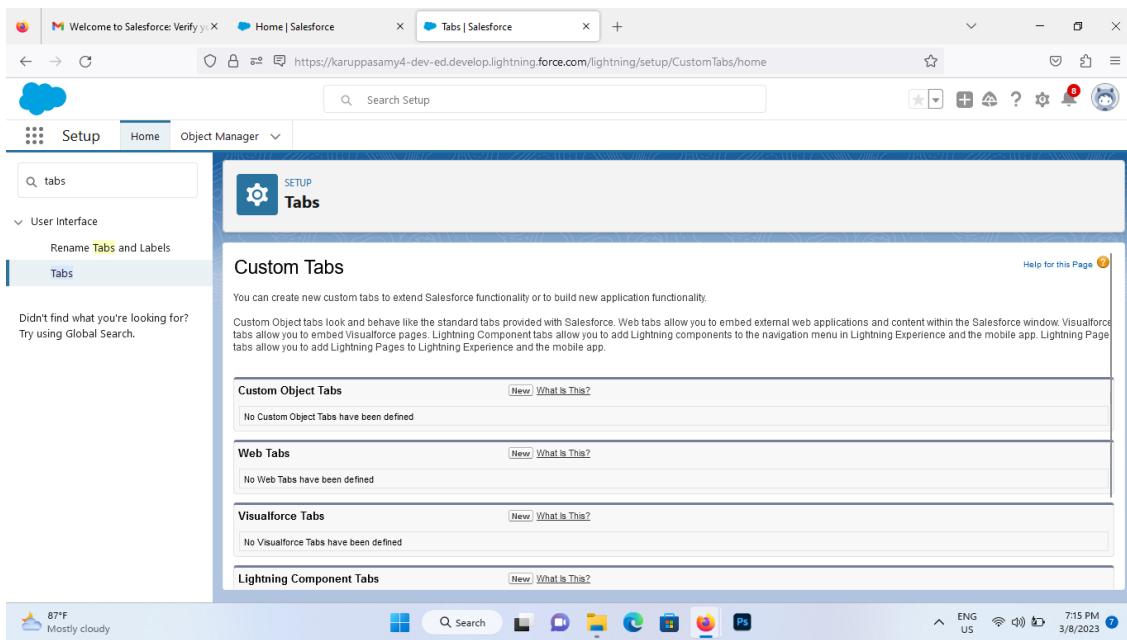
Fig(5)



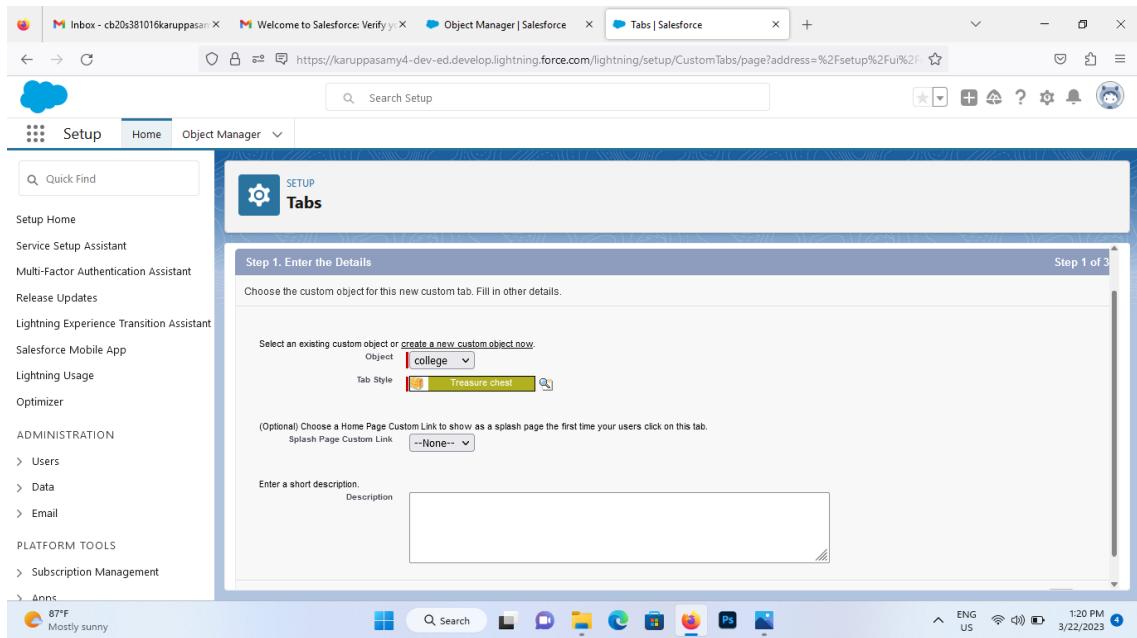
Fig(6)

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object 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.



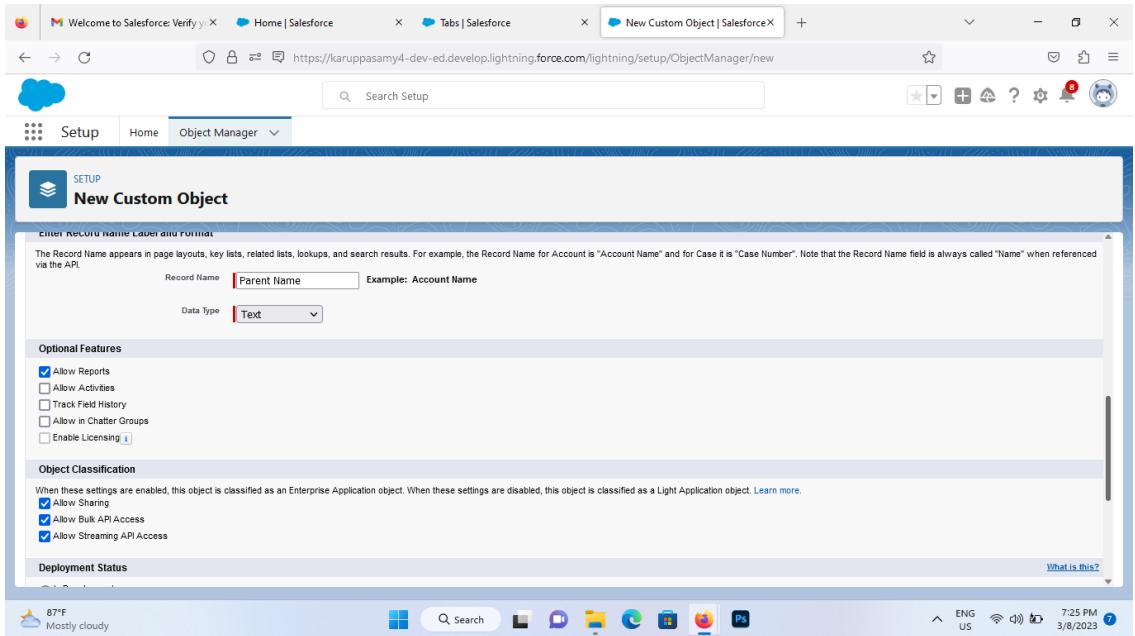
Fig(7)



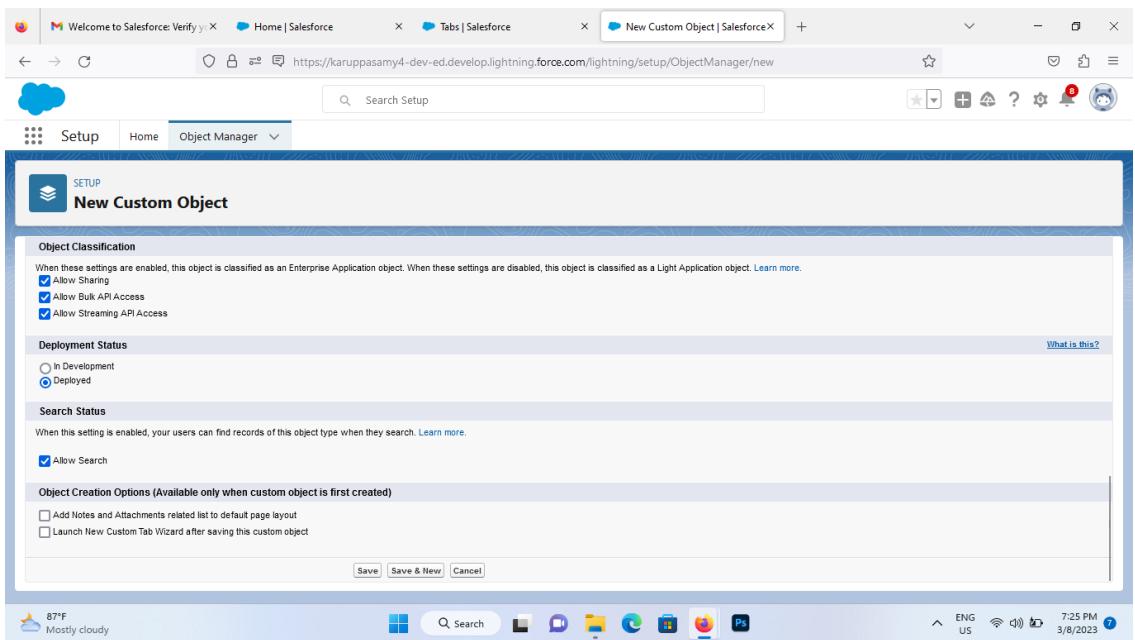
Fig(8)

Create parent object

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: Parent
 - * Plural Label: Parents
 - * Record Name: Parent Name
 - * Check the Allow Reports checkbox
 - * Check the Allow Search checkbox
 - * Click Save



fig(9)

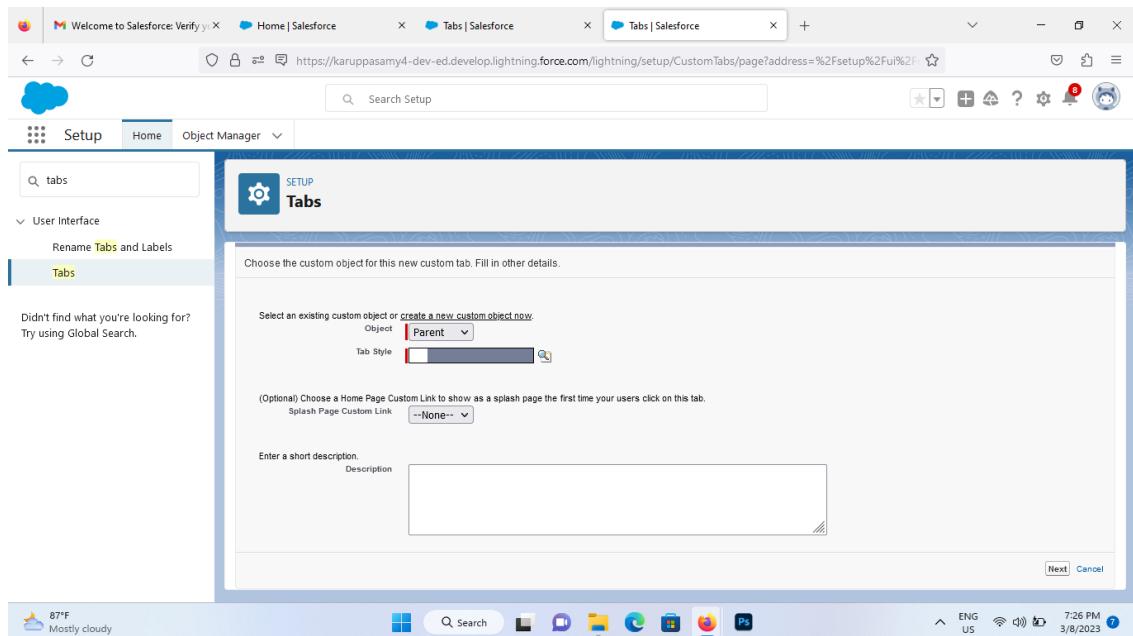


Fig(10)

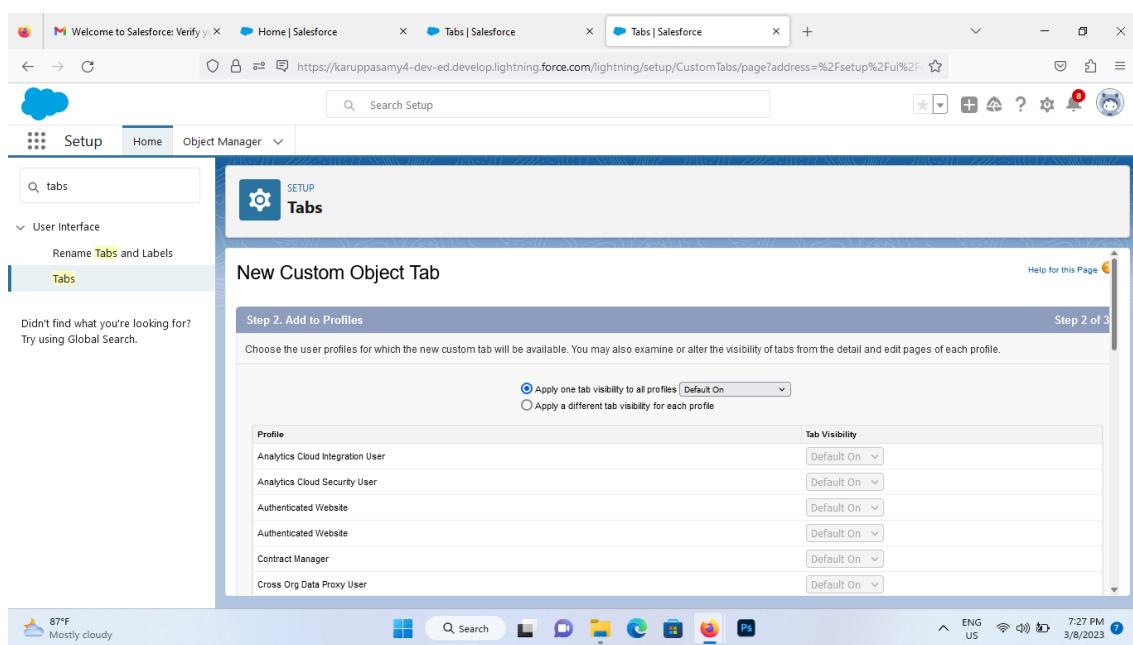
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select Parents.
2. For Tab Style, select any icon.

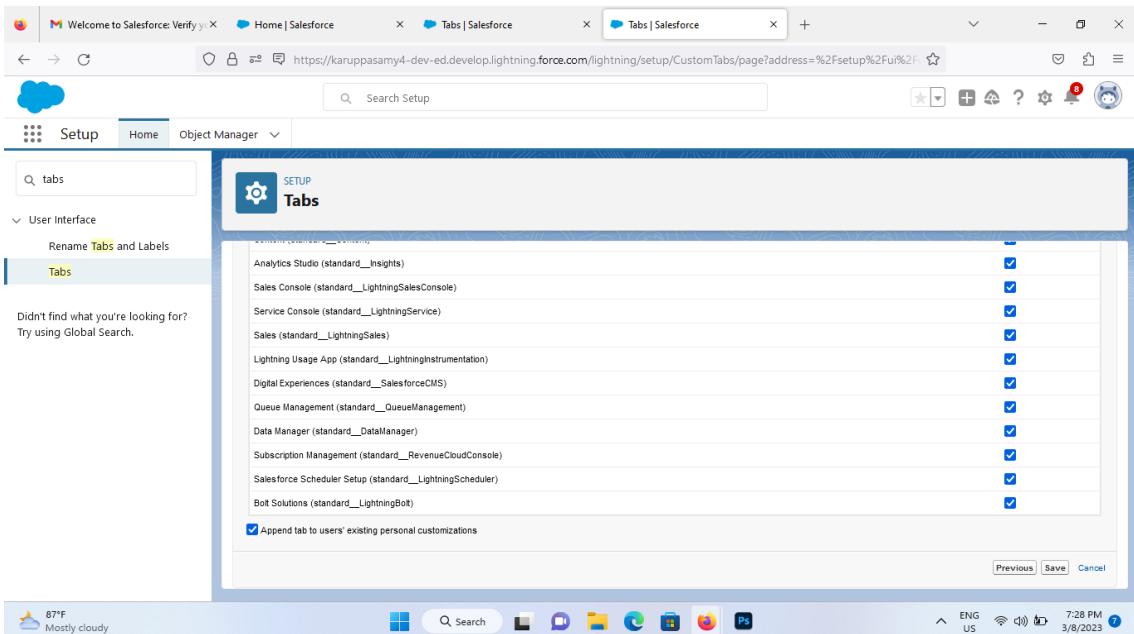
3. Leave all defaults as is. Click Next, Next, and Save.



Fig(11)



Fig(12)



Fig(13)

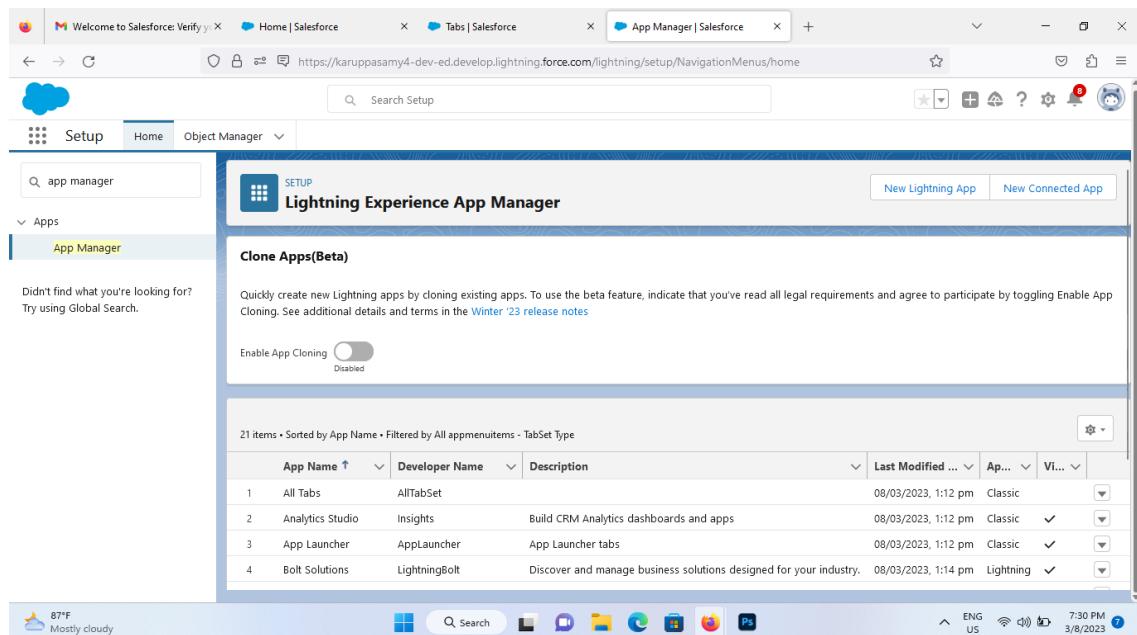
Lightning App

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. The simplest app usually has just two tabs

Create the College Management app

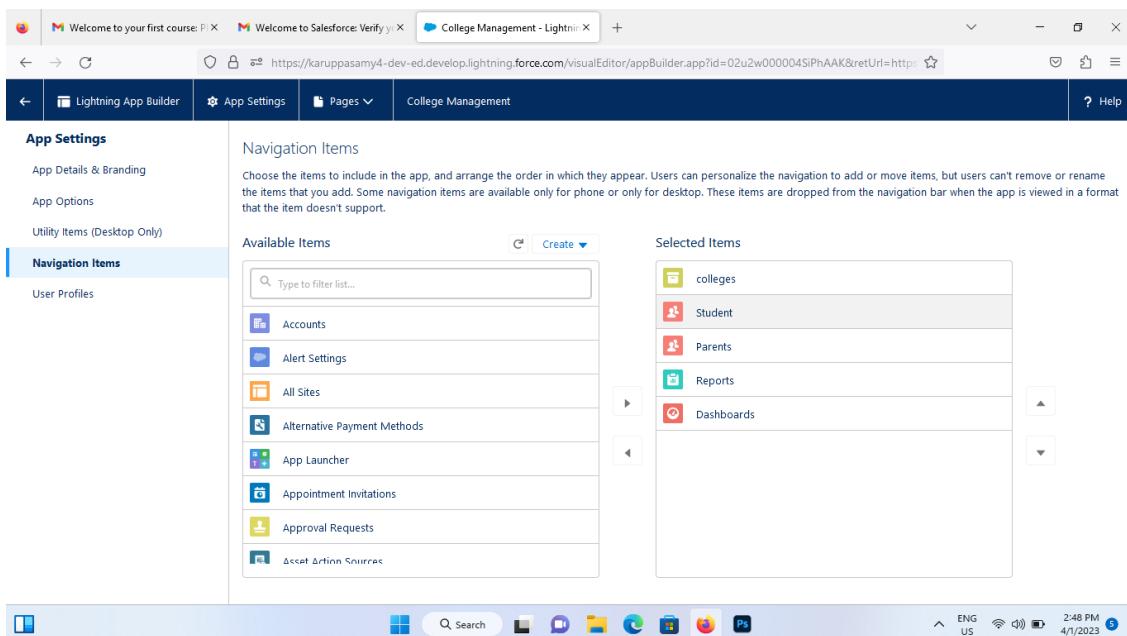
From Setup, enter App Manager in the Quick Find and select App Manager.

- Click New Lightning App. Enter School Management as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Schools, Students, Parents, Examination, Result, Revaluation, Reports, and Dashboards and move them to Selected Items. Click Next.



Fig(14)

- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
 - To verify your changes, click the App Launcher, type College Management and select the College Management app.



Fig(15)

Note:

1. **App Launcher**-Displays available apps.
2. **App Name**-Displays the current selected app.
3. **Navigation menu**-Displays the tabs available inside the app.

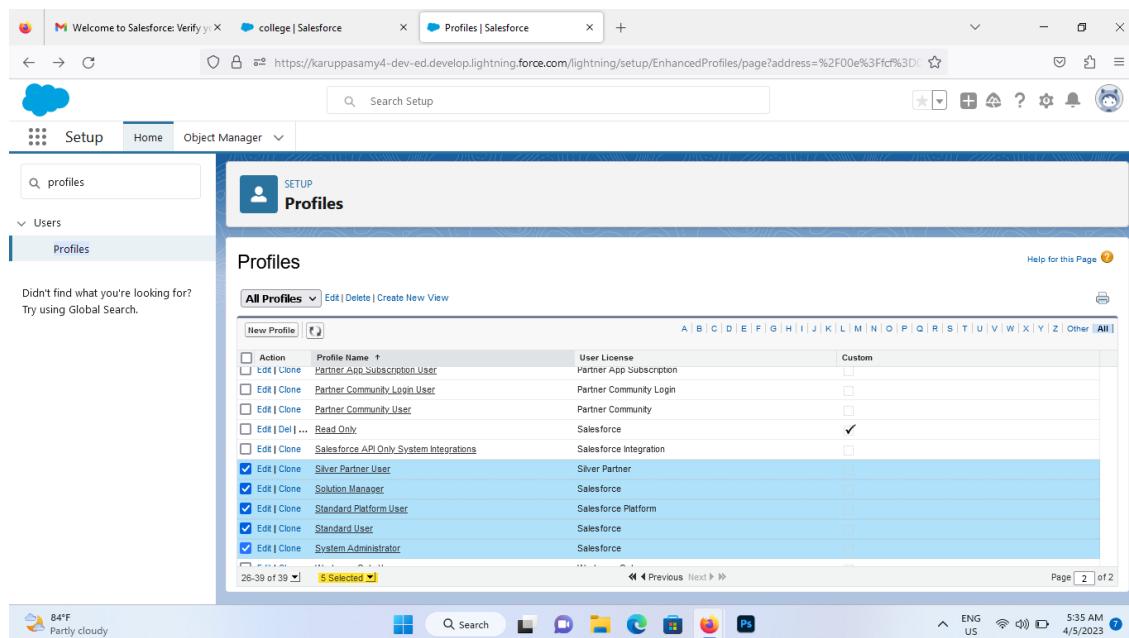
Profile

A **profile** is a group/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, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges

Creation on profile:

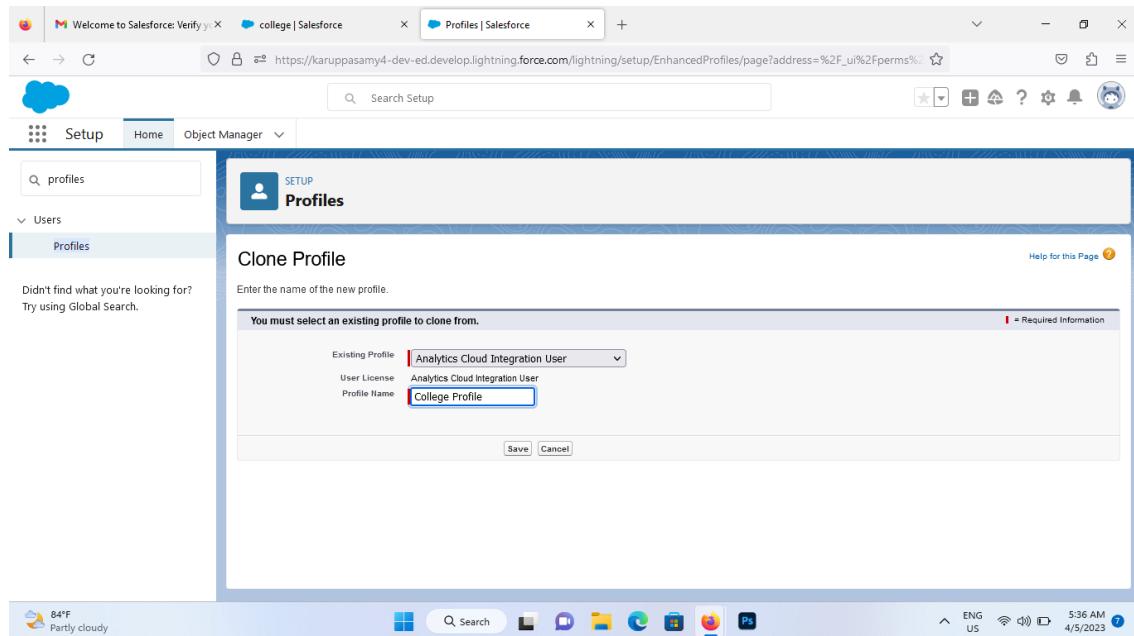
From Setup enter Profiles in the Quick Find box, and select Profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.



Fig(16)

3. For Profile Name, enter School profile.



Fig(17)

4. Click Save.

5. While still on the School profile page, then click Edit.

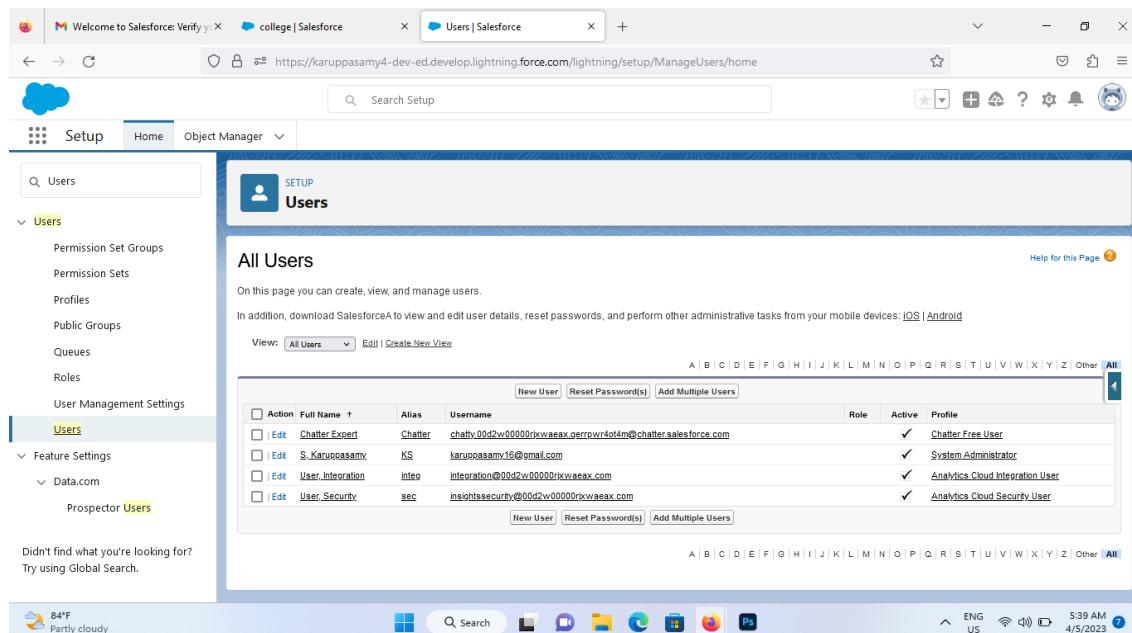
6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

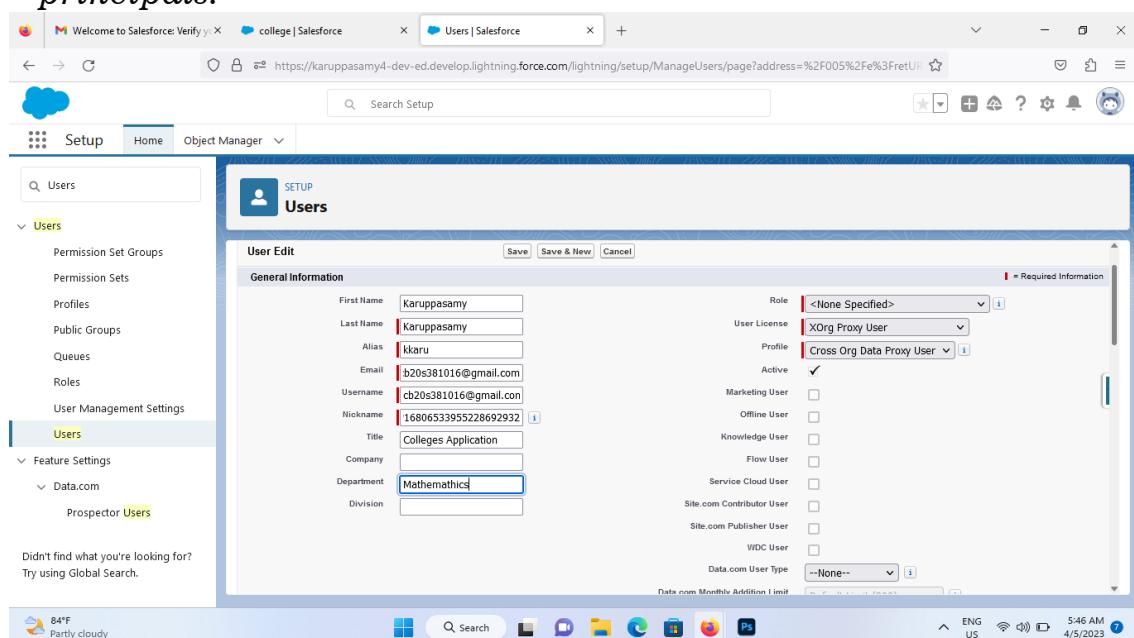
Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.



Fig(18)

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 is the same 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 emailed to your email.
7. Similarly follow the above steps and create 3 users as faculty principals.



Fig(19)

Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Permission sets 1:

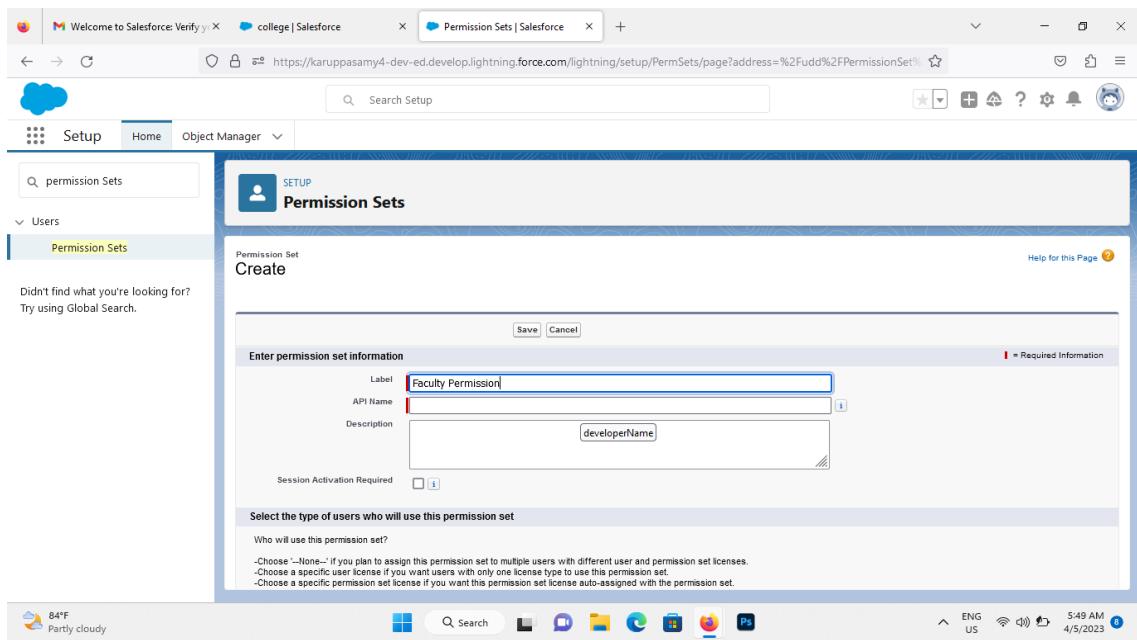
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.

The screenshot shows the Salesforce Lightning interface with the following details:

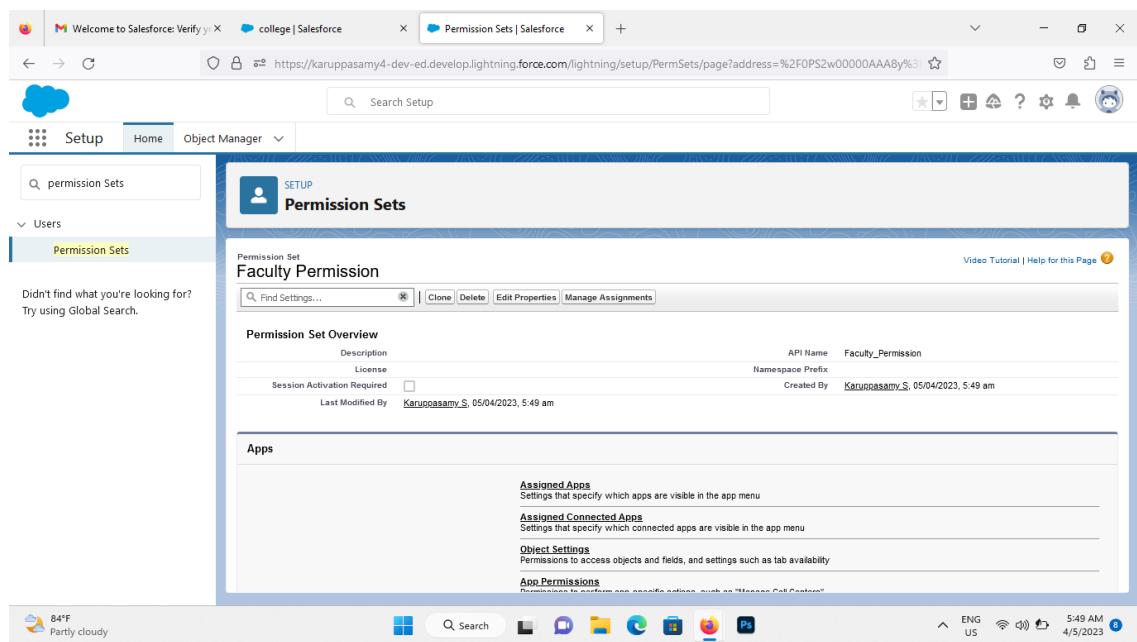
- Header:** Welcome to Salesforce: Verify your account | college | Salesforce | Permission Sets | Salesforce
- Search Bar:** Search Setup
- Navigation:** Setup (selected), Home, Object Manager
- Left Sidebar:** Users > Permission Sets
- Page Title:** Permission Sets
- Page Description:** On this page you can create, view, and manage permission sets. Didn't find what you're looking for? Try using Global Search.
- Help:** Help for this Page
- Table:** All Permission Sets (A-Z) | Edit | Delete | Create New View
- Table Headers:** Action, Permission Set Label, Description, License
- Table Data:** A list of permission sets including Buyer, Buyer Manager, CRM User, Commerce Admin, Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Experience Profile Manager, and others.
- Page Footer:** 84°F Partly cloudy, Search, File, Home, Recent, Help, Page 1 of 1, ENG US, 5:47 AM, 4/5/2023

Fig(20)

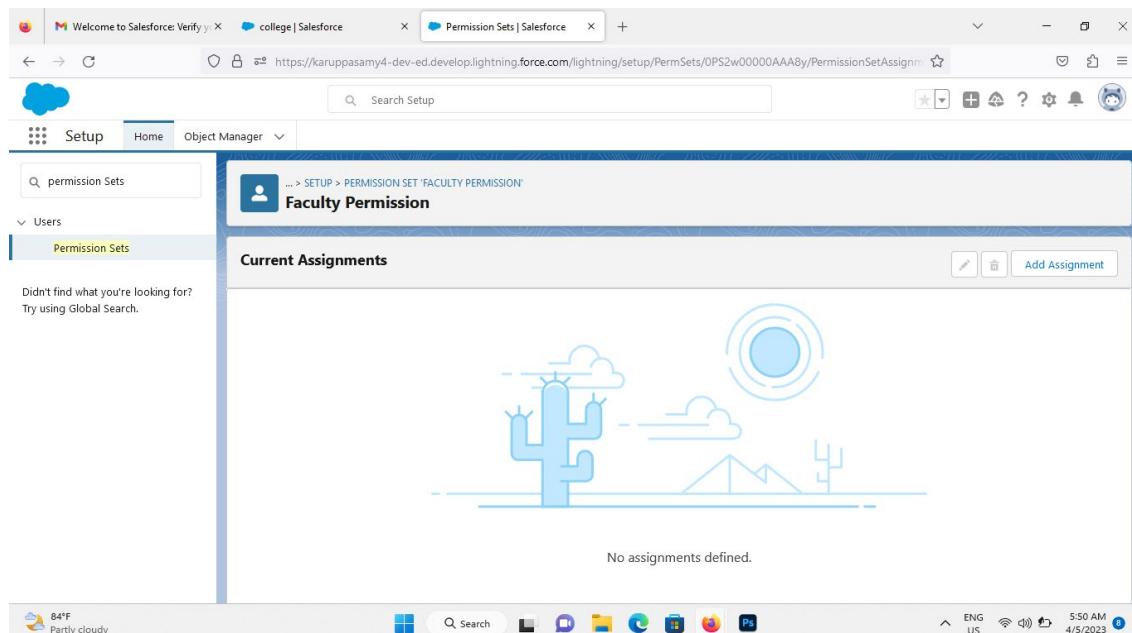
3. Give the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user



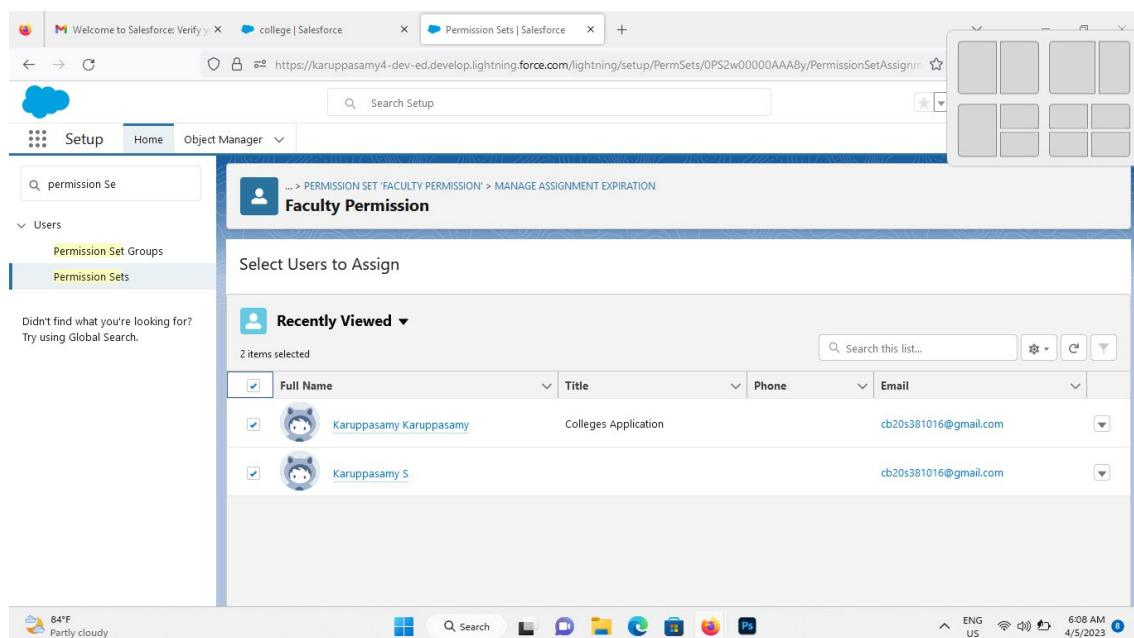
Fig(21)



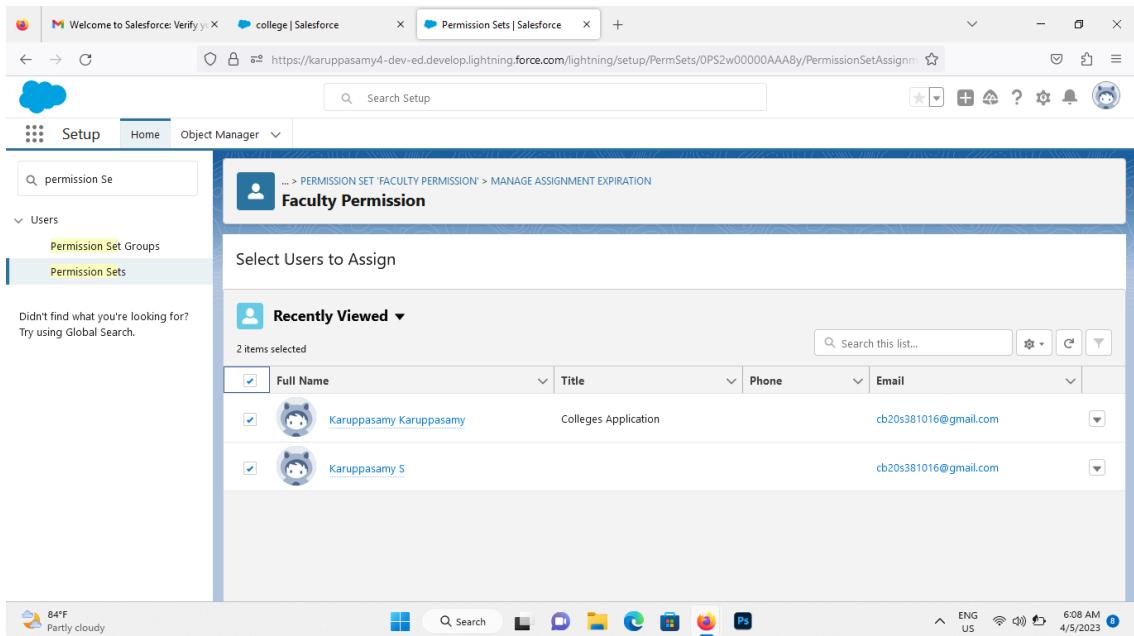
Fig(22)



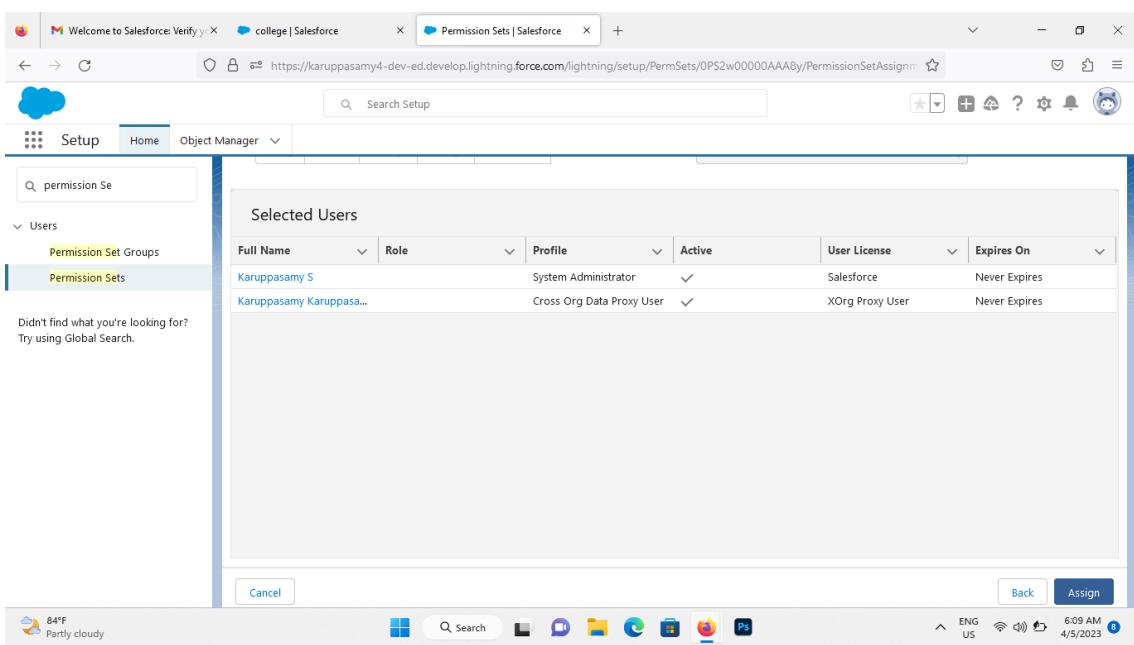
Fig(23)



Fig(24)



Fig(25)



Fig(26)

Similarly follow the above steps for the permission set 2.

Permission sets 2:

1. From Setup, enter *Permission Sets* in the Quick Find box, then select *Permission Sets*.

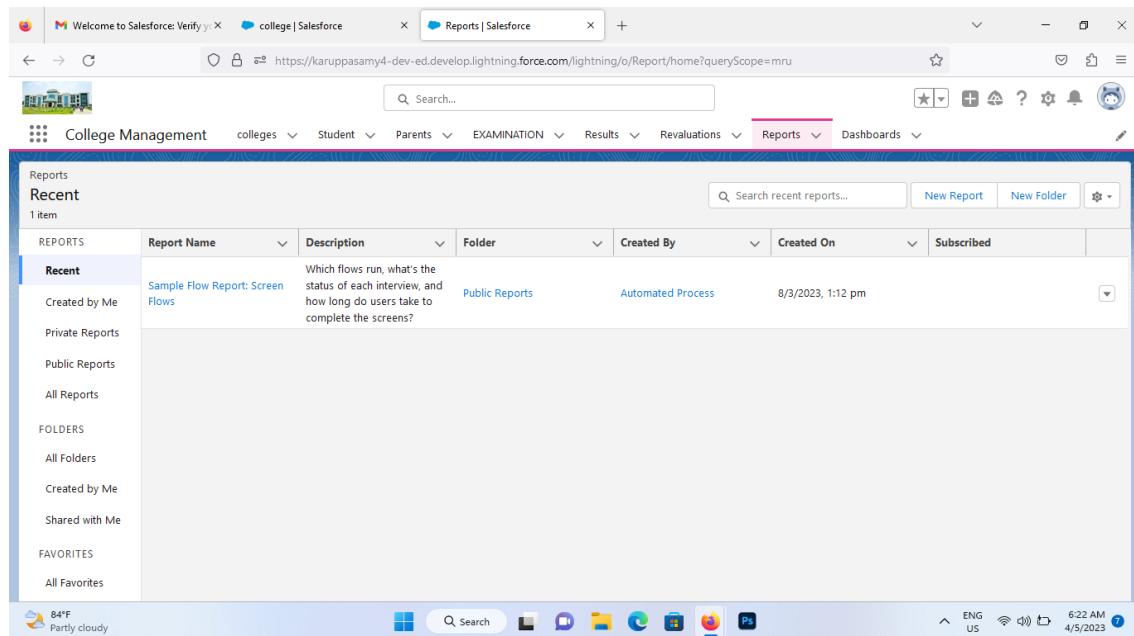
2. Click New.

3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

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.

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. Customize your report, then save or run it.

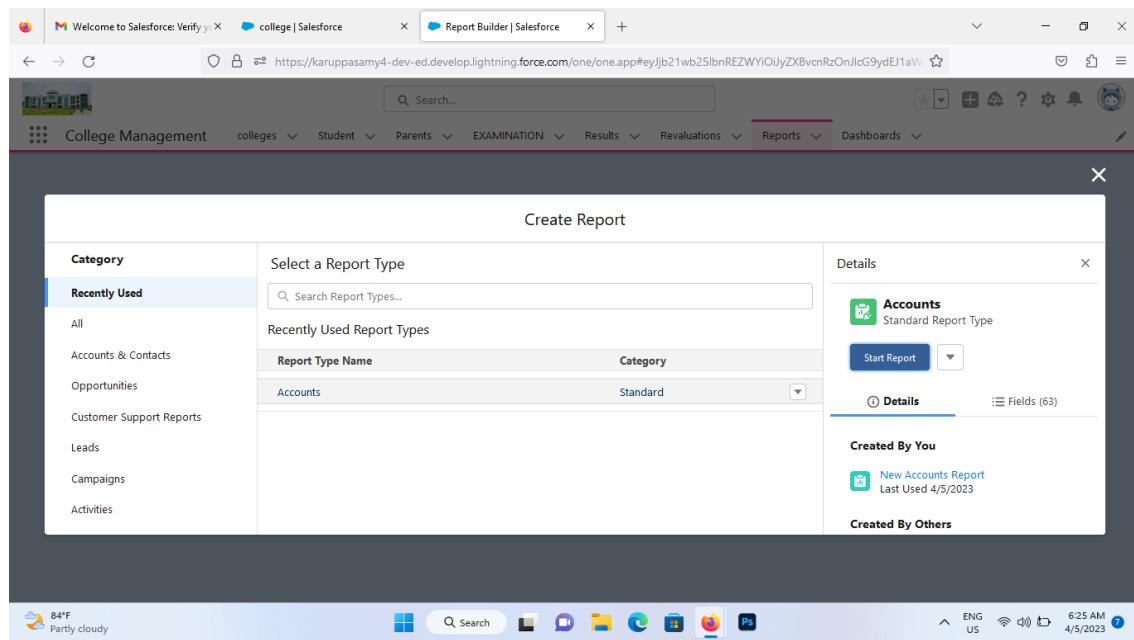


The screenshot shows the Salesforce Lightning interface with the Reports tab selected. A recent report titled "Sample Flow Report: Screen Flows" is listed in the grid. The report details are as follows:

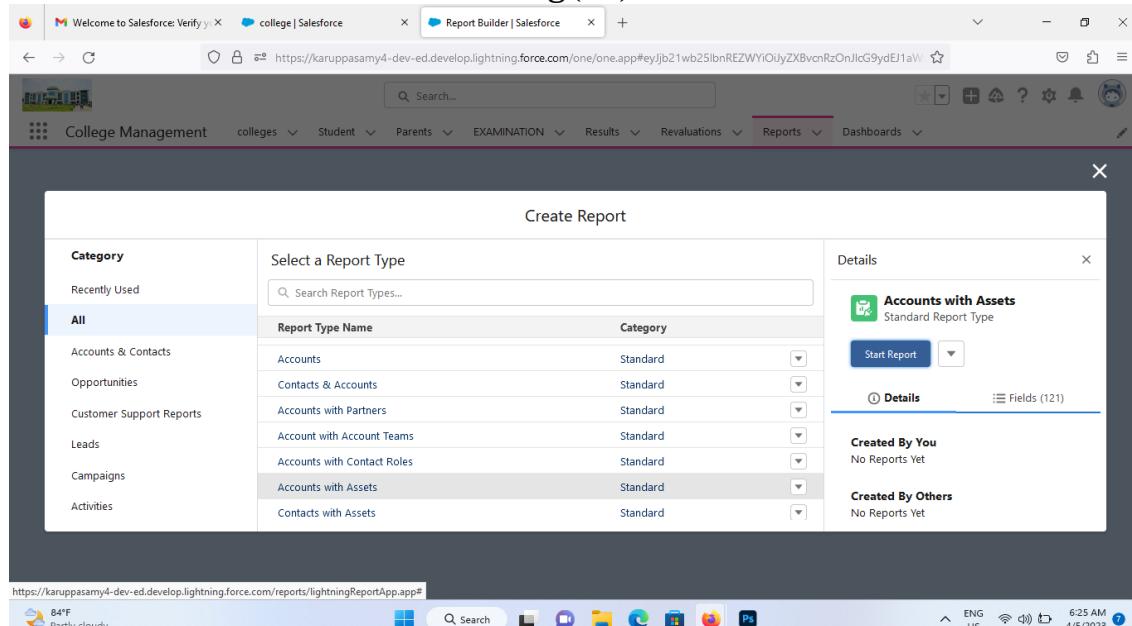
Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	8/3/2023, 1:12 pm	

The sidebar on the left shows categories like Recent, Reports, and Folders. The bottom of the screen displays the Windows taskbar with various application icons and system status.

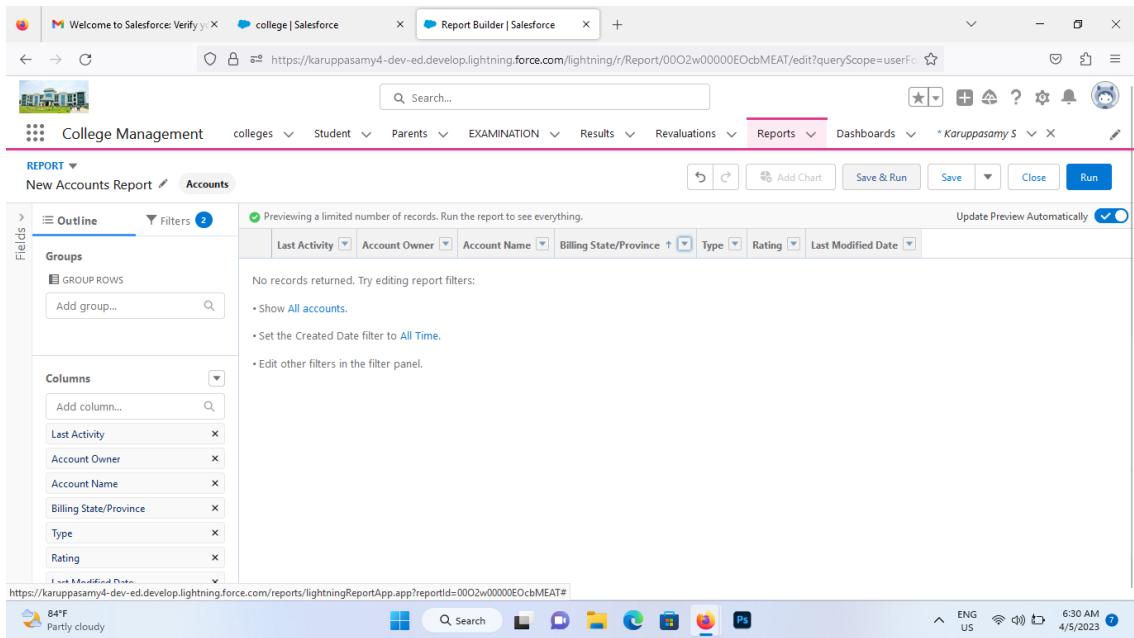
Fig(27)



Fig(28)



Fig(29)



Fig(30)

Trailhead Profile Public URL

Team Lead- <https://trailblazer.me/id/karuppasamy>

Team Member 1-<https://trailblazer.me/id/thomjeniferretchanya>

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

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

5.ADVANTAGES:

- * An online examination form filling.
- * Answer book valuations and marks filled into control sheet.
- * Easy to exam apply.
- * Re-checking and re-evaluation forms.
- * Data Safe and Secure.
- * Easy to access other people's data.

DISADVANTAGE:

*The excess initial time and productivity cost of

Implementation.

*It requires a process driven sales organization.

**Only online usage Application .*

**Technical problems or connection errors may occur.*

** This is no equity in the condition to take the exam.*

APPLICATIONS:

***College application** is the process by which individuals apply to gain entry into a college or university. Although specific details vary by country and institution, applications generally require basic background information of the applicant, such as family background, and academic or qualifying exam details such as grade point average in secondary school and standardized testing scores

**Typically, universities will provide an exam schedule before the start of the exam period. This schedule will indicate the dates and times of each exam.*

**The results usually include the grades or marks obtained by each student in each subject, as well as their overall GPA (Grade Point Average) or CGPA (Cumulative Grade Point Average) for the semester or year. Depending on the university, the results may also include additional information such as the student's rank in the class, any academic awards or recognition they may have received, and any remarks or feedback from the instruct or examiner.*

CONCLUSION:

** This includes basic information such as name, address, contact details, date of birth, and educational background. It may also include information about the student's interests, extracurricular activities, and academic performance.*

** This refers to an exam that tests knowledge and understanding of the principles and practices of CRM (Customer Relationship Management) in the context of colleges. This exam could cover topics such as data collection, analysis, and management; communication strategies; student support services; and donor relations. It would be aimed at students or professionals who are interested in working in the field of higher education administration or CRM*

FUTURE SCOPE:

** With the use of artificial intelligence and machine learning, exams could become more personalized and adaptive to each individual student's strengths and weaknesses. This can help to provide a more accurate assessment of student understanding and reduce the potential for bias in the exam.*

** With the use of digital technology, exam results could be provided to students in real-time or soon after the exam has been completed. This can help to provide immediate feedback on student performance and identify areas for improvement.*

** Exam revaluation could be conducted using digital verification systems, which can help to reduce the potential for errors or biases in the revaluation process.*
