Dr. KALAIGNAR GOVERNMENT ARTS COLLEGE

KULITHALAI – 639120

DEPARTMENT OF PHYSICS

NAAN MUDHALVAN – SMART BRIDGE PROJECT

PROJECT TITLE : A CRM Application for Schools/Colleges

SUBMITTED BY

TEAM LEADER	:	LIVEEN V	(CB20S 446861)
TEAM MEMBER 1	:	LINGARAJ T	(CB20S 446860)
TEAM MEMBER 2	:	MANIMEGALA S	(CB20S 446862)
TEAM MEMBER 3	:	NANTHINI N	(CB20S 446863)

INDEX

S.NO	CONTENT	PAGE NO
1	INTRODUCTION	3
2	EMPATHY MAP	4
3	BRAINSTORMING MAP	5
4	ACTIVITY & SCREENSHOT	6
5	TRAILHEAD PROFILE PUBLIC URL	21
6	ADVANTAGES & DISADVANTAGES	22
7	APPLICATIONS	24
8	CONCLUSION	24
9	FUTURE SCOPE	25

INTRODUCTION

Salesforce is a modern cloud computing technology, which is available on cloud, no need to install any software as well as no hardware required. You can develop our own applications as well as need any application on demand and then you can buy from app exchange. App Exchange is a market place to sell our custom applications as well as to buy applications from app exchange easily Salesforce is a leading CRM (Customer Relationship Management) software which is served form cloud. It has more than 800 applications to support various features like generating new leads, acquiring new leads, increasing sales and closing the deals. It is designed to manage the organization's data focused on customer and sales details. It also offers features to customize its inbuilt data structures and GUI to suit the specific needs of a business. More recently, it has started offering the IOT (internet of things) connectivity to the CRM platform.

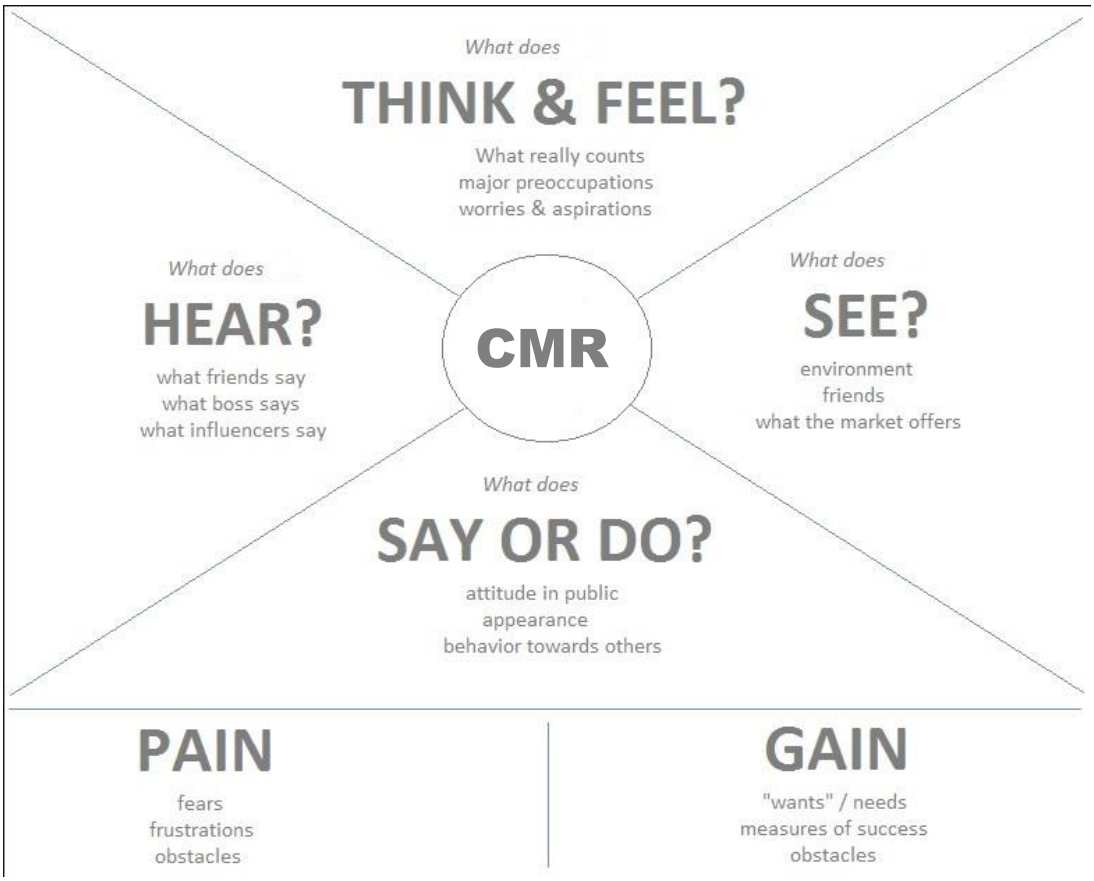
The design and implementation of the system is to provide service in institute and colleges. College Staff uploads attendance, results, share subject notes and college notifications through a secure, online interface using Salesforce. All data will be stored on the Salesforce cloud managed by the college Administrator. This system will decreases the paperwork and time needed to access student records. Previously, college relied heavily on paper records for this initiative which had its own disadvantages. This system provides a simple interface for the maintenance of student information. Achieving this objective is difficult using a manual system as the information are scattered, can be redundant and collecting relevant information may be very time consuming. Our proposed system ensures to overcome these limitations. There is another part which is feedback, the student can give the

feedback at anytime from anywhere to faculty. This feedback can be reviewed by the admin or the management committee of the institute through which the confidentiality of the feedback of the faculty can be maintained. This application is developed for daily student attendance in colleges and institutes. The teachers can send the attendance summary and feedback about the students to their parents. It can also be useful in an organization or company at a certain limit not the whole application.

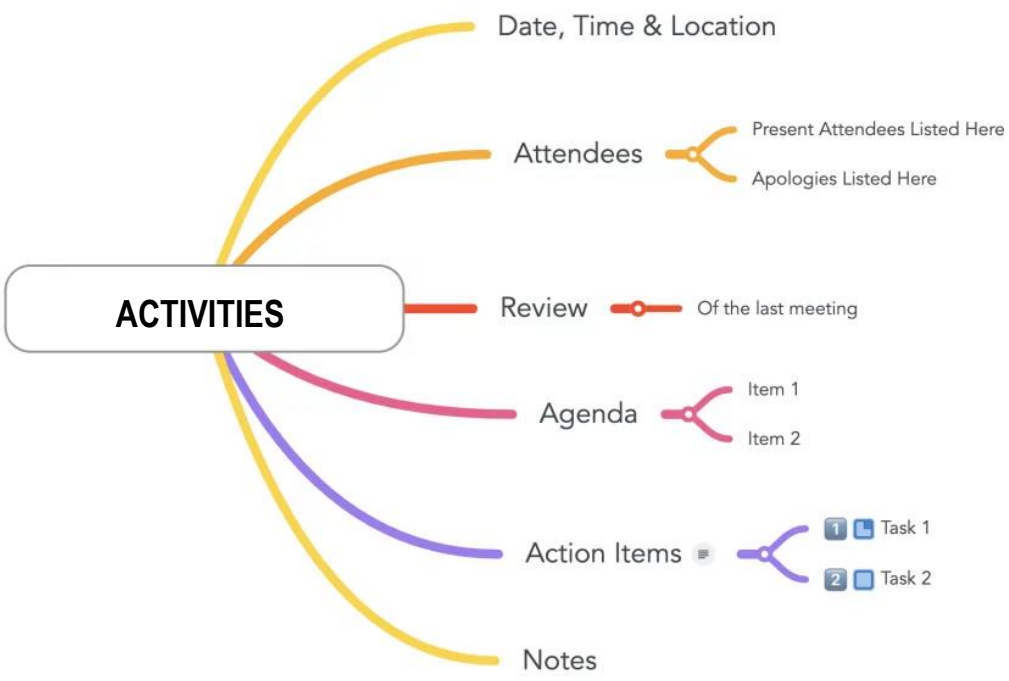
OVERVIEW:

- Build a lightning app, add tabs and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.

EMPATHY MAP

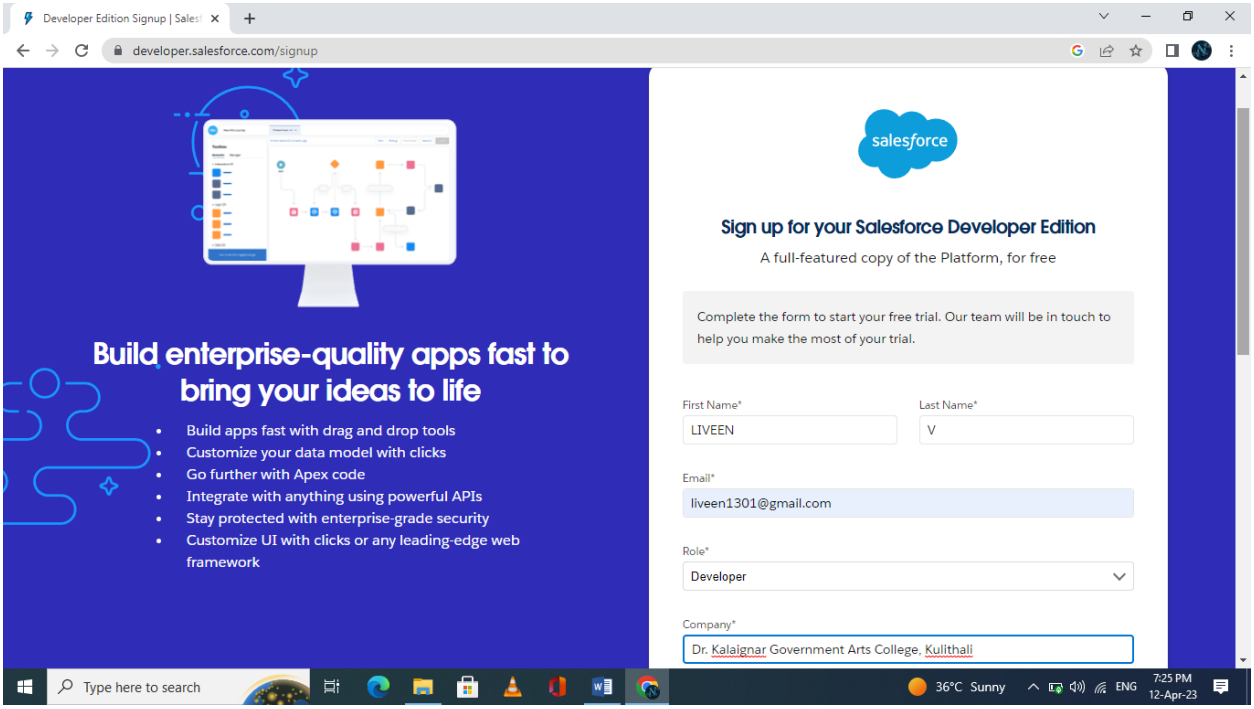

What does
THINK & FEEL?
What really counts
major preoccupations
worries & aspirations
What does
HEAR?
what friends say
what boss says
what influencers say
CMR
What does
SEE?
environment
friends
what the market offers
What does
SAY OR DO?
attitude in public
appearance
behavior towards others
PAIN
fears
frustrations
obstacles
GAIN
"wants" / needs
measures of success
obstacles

BRAIN STORMING MAP

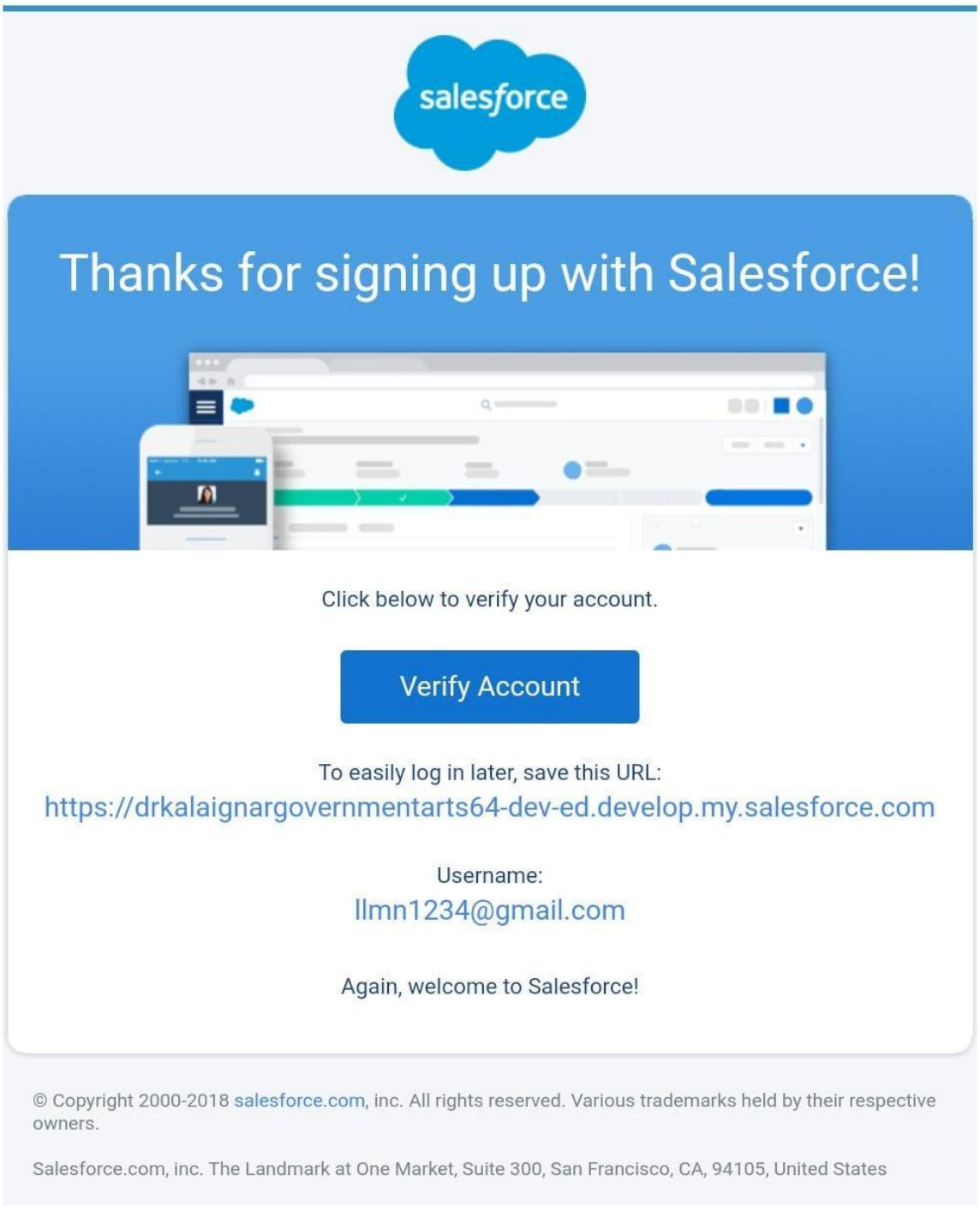


Milestone 1 – Create Salesforce Org:

Creating Developer Account Creating a developer org in Salesforce.



Account Activation

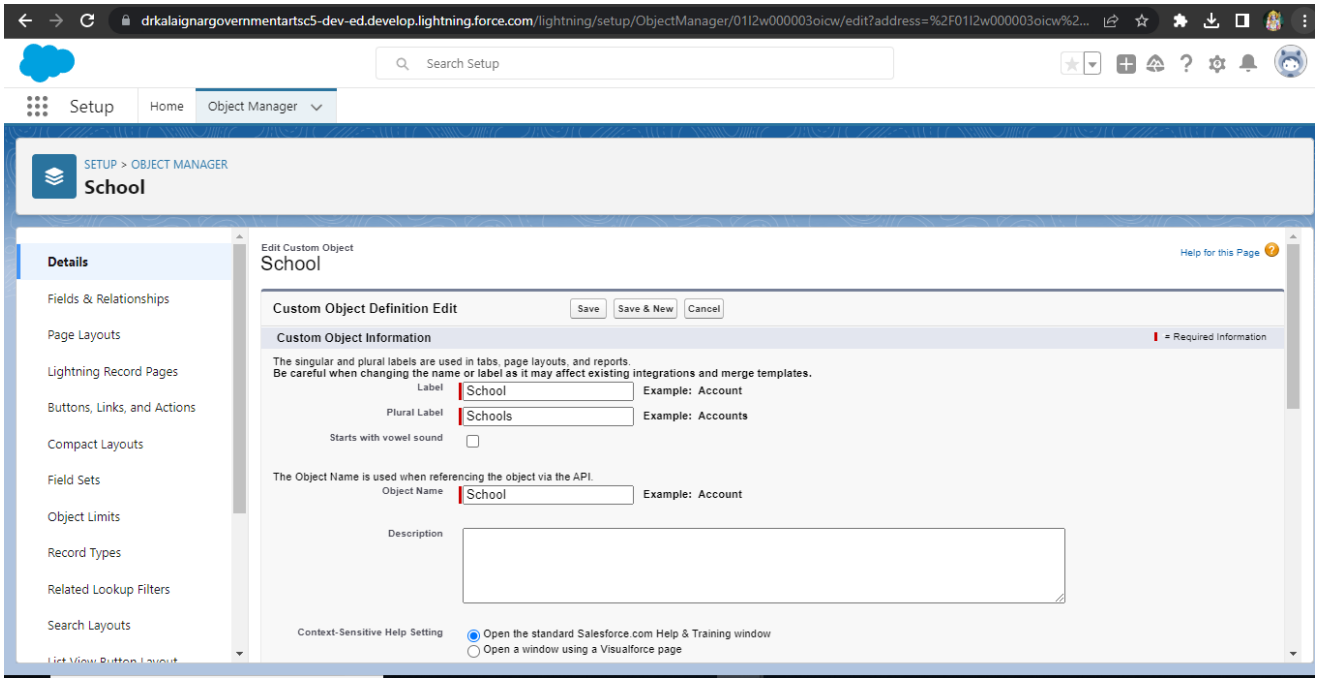


Milestone – 2: Object

Activity – 1: Creation of School Object

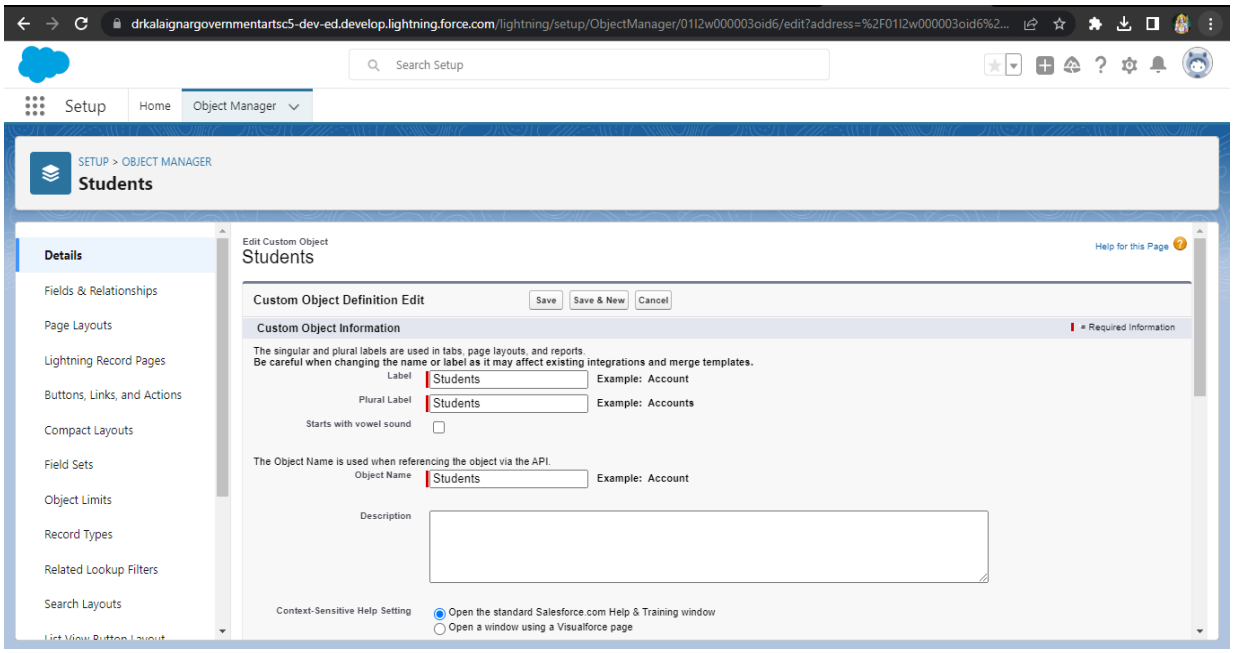
For this school management we need to create 3 objects i.e. school, parents and students. The below steps will assist you in creating those objects.

This picture belongs to School object.



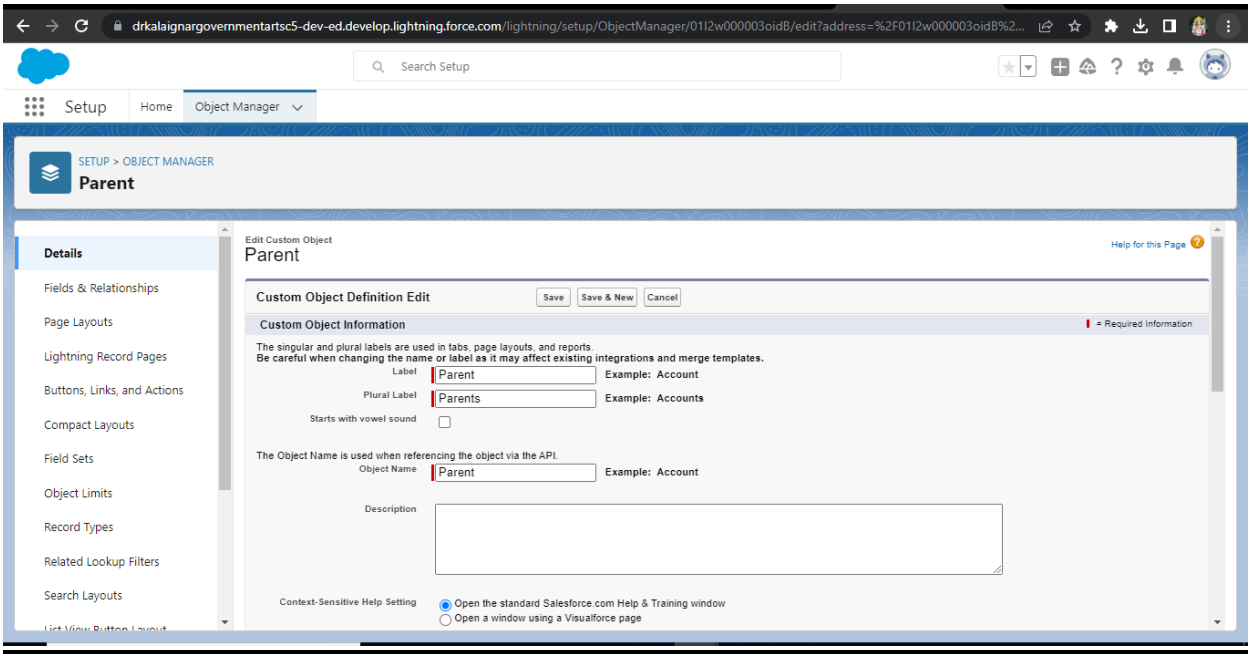
Activity 2: Create Student Object

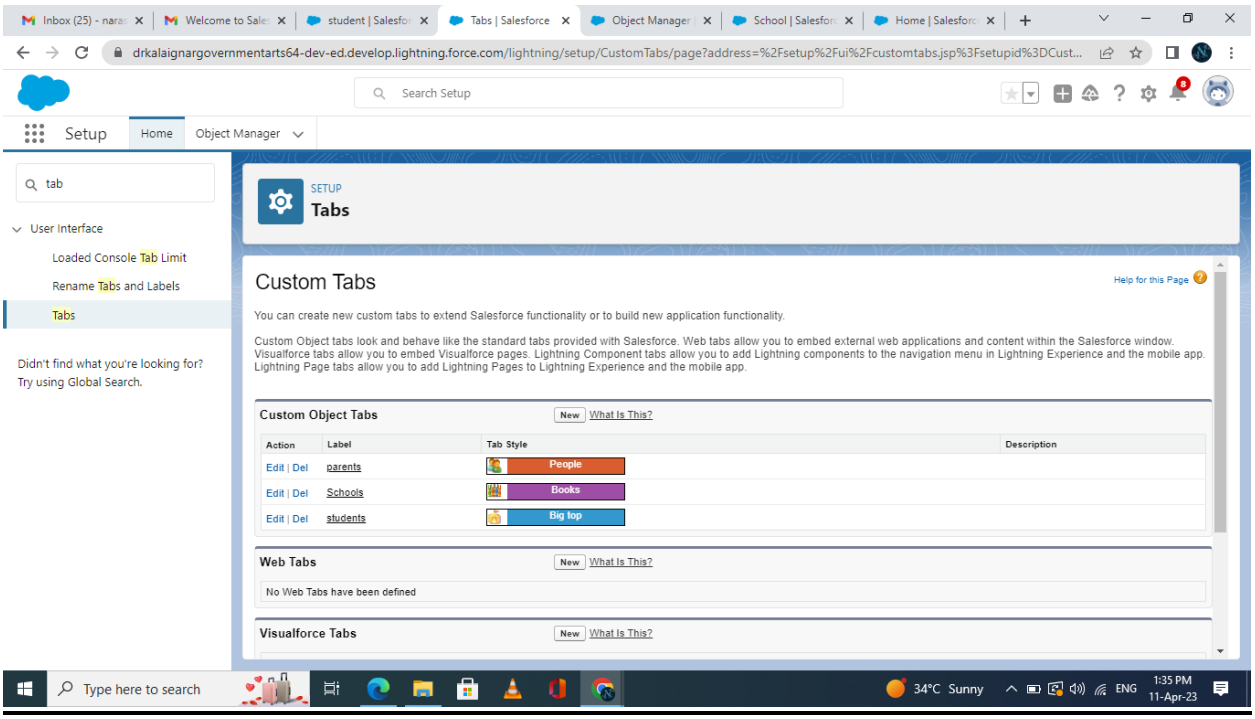
This picture belongs to Students object.



Activity 3: Create Parent object

This picture belongs to School object.

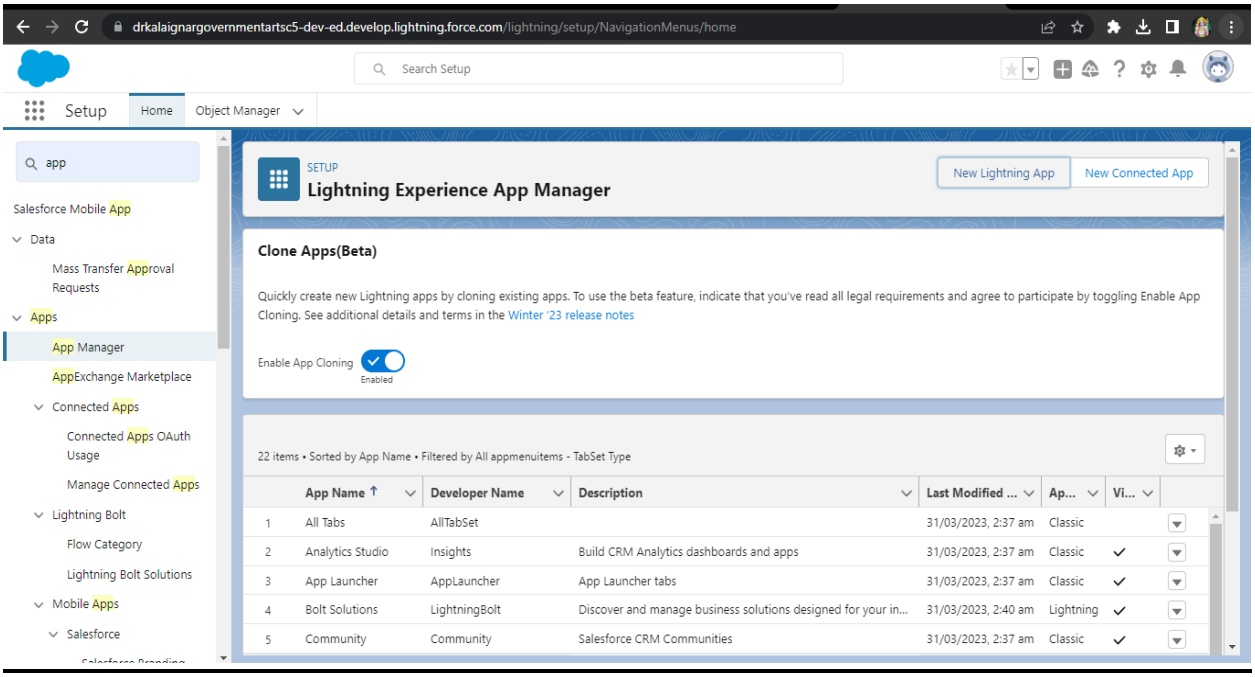




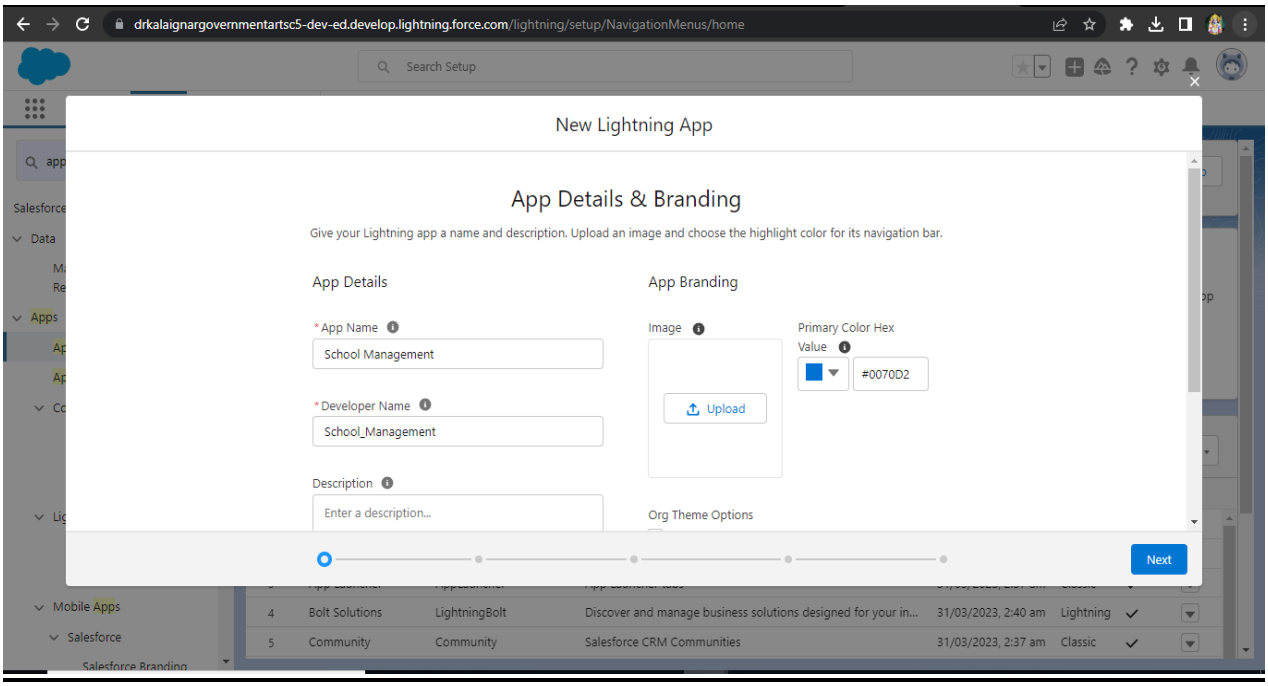
Milestone -3: Lightning App

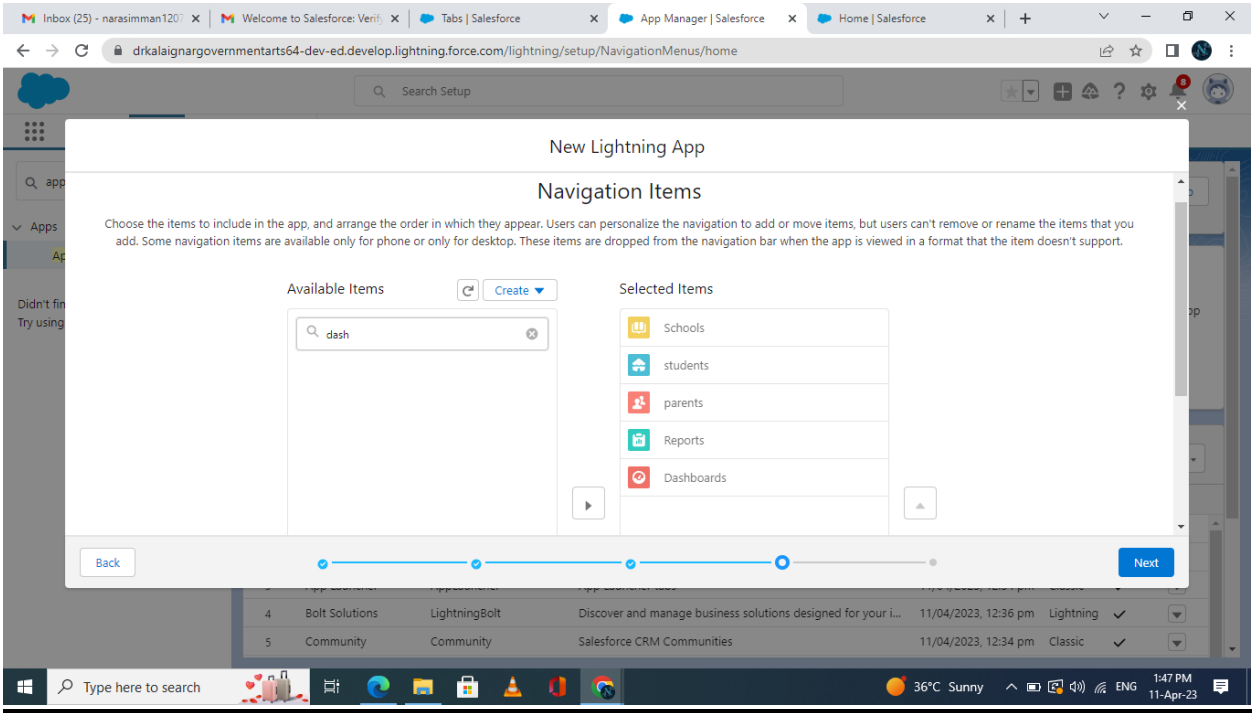
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs.

Activity:



Create the School Management app

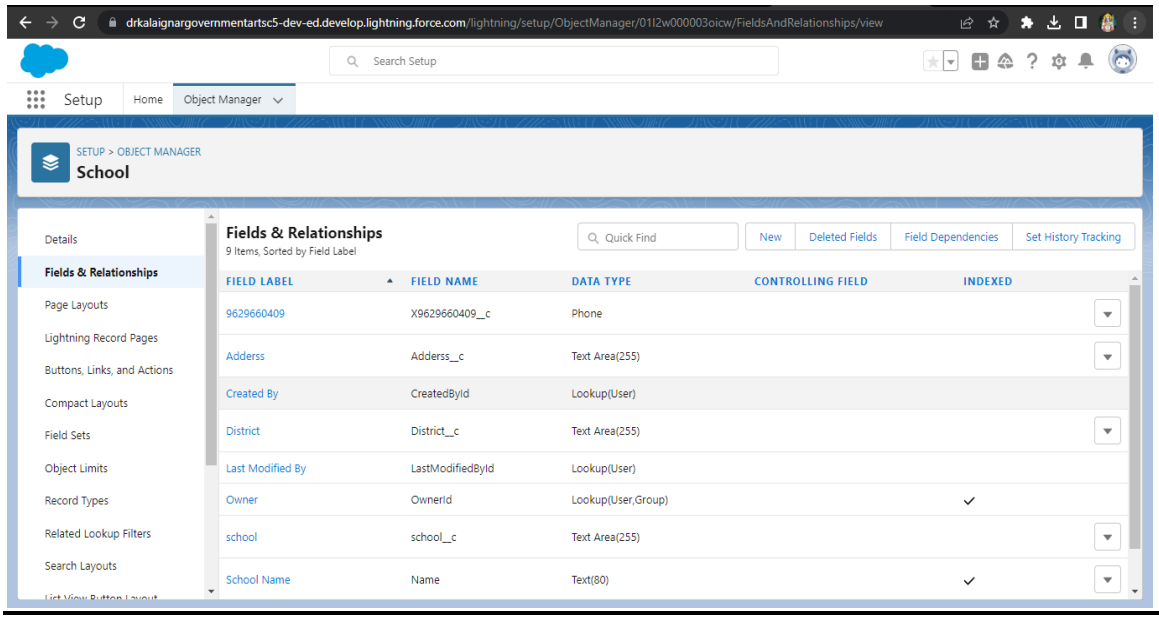




Milestone -4: Fields and Relationship

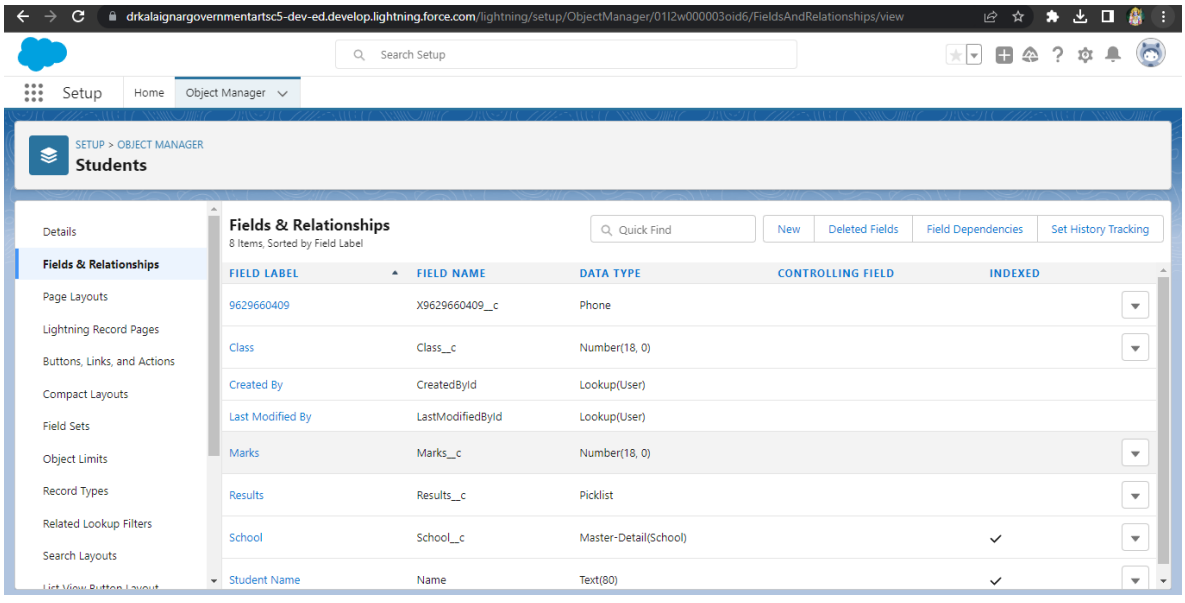
Activity – 1:

This is belongs to Fields & Relationship for School objects.



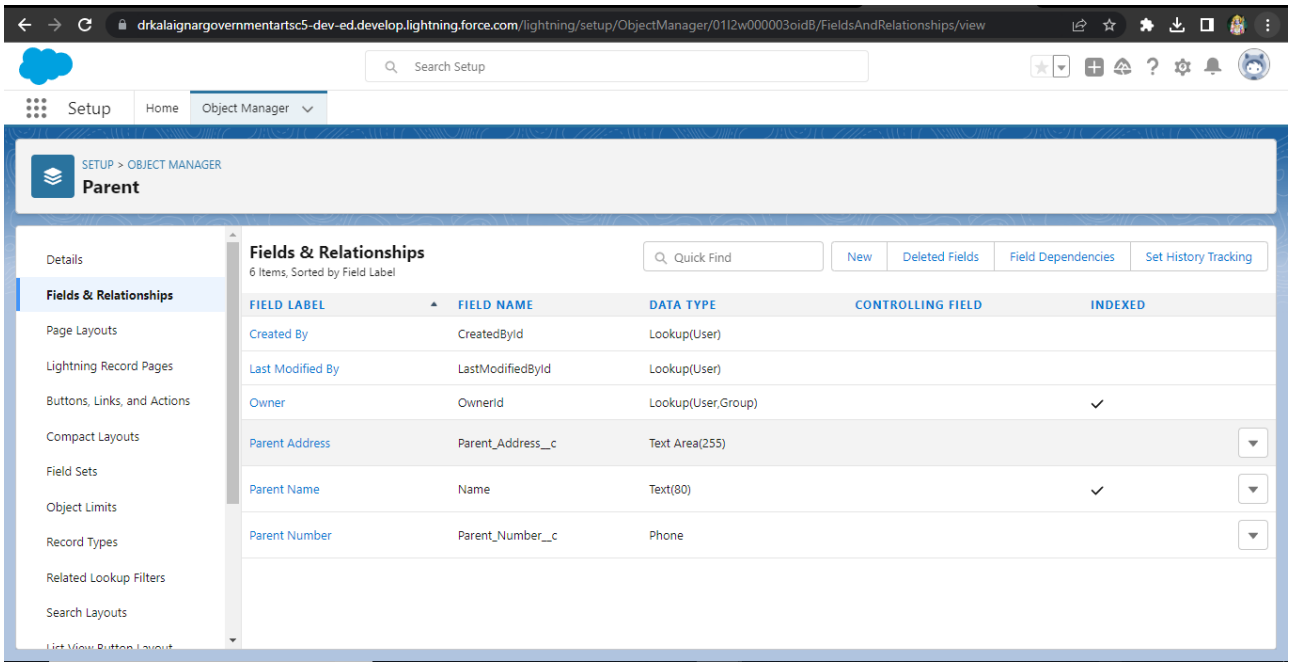
Activity – 2:

This is belongs to Fields & Relationship for Students objects.

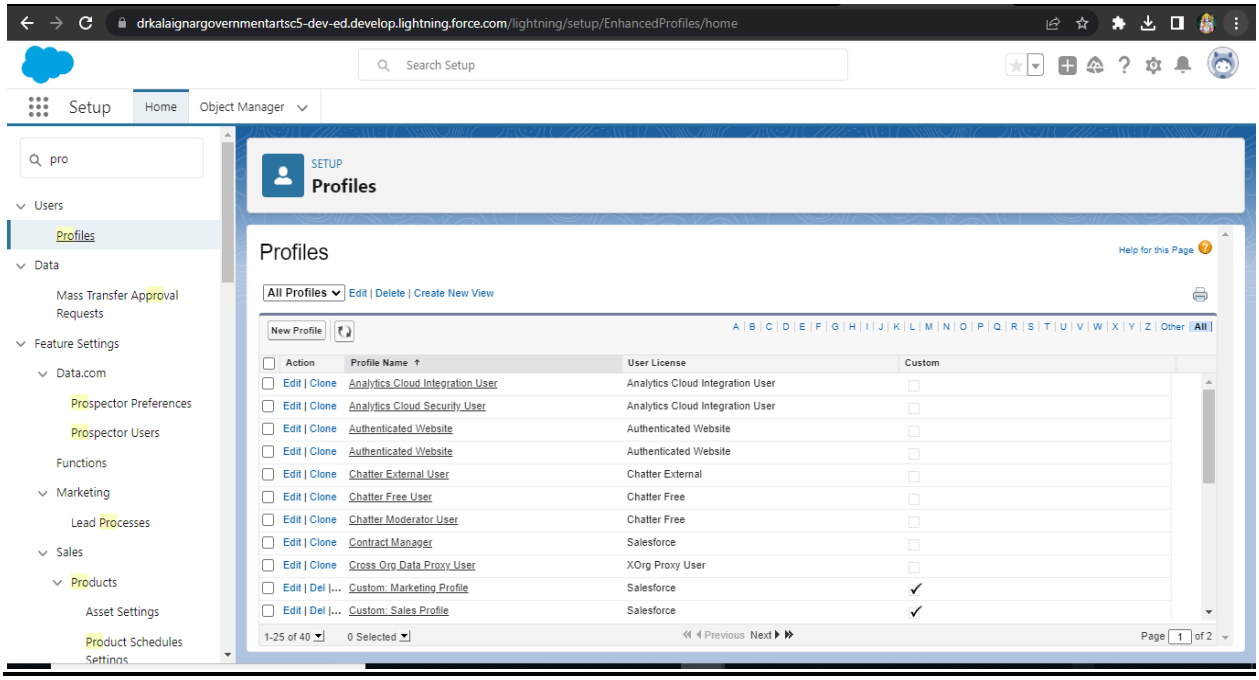


Activity – 3:

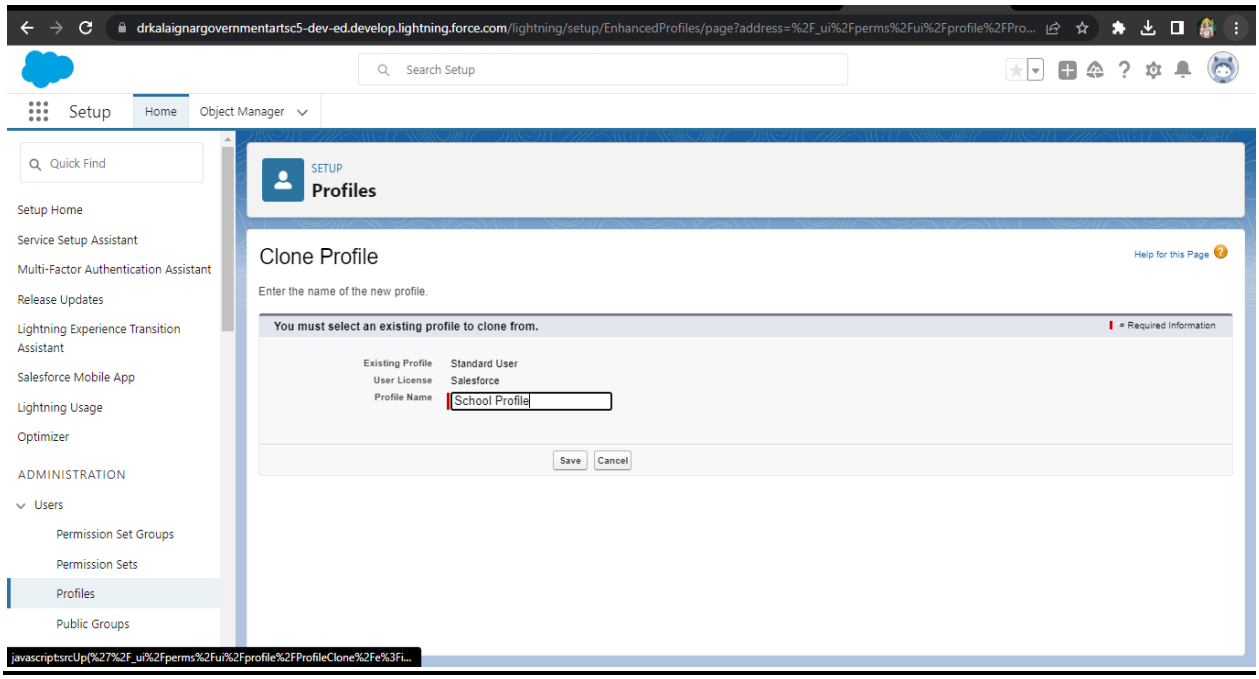
This is belongs to Fields & Relationship for the Parents objects.



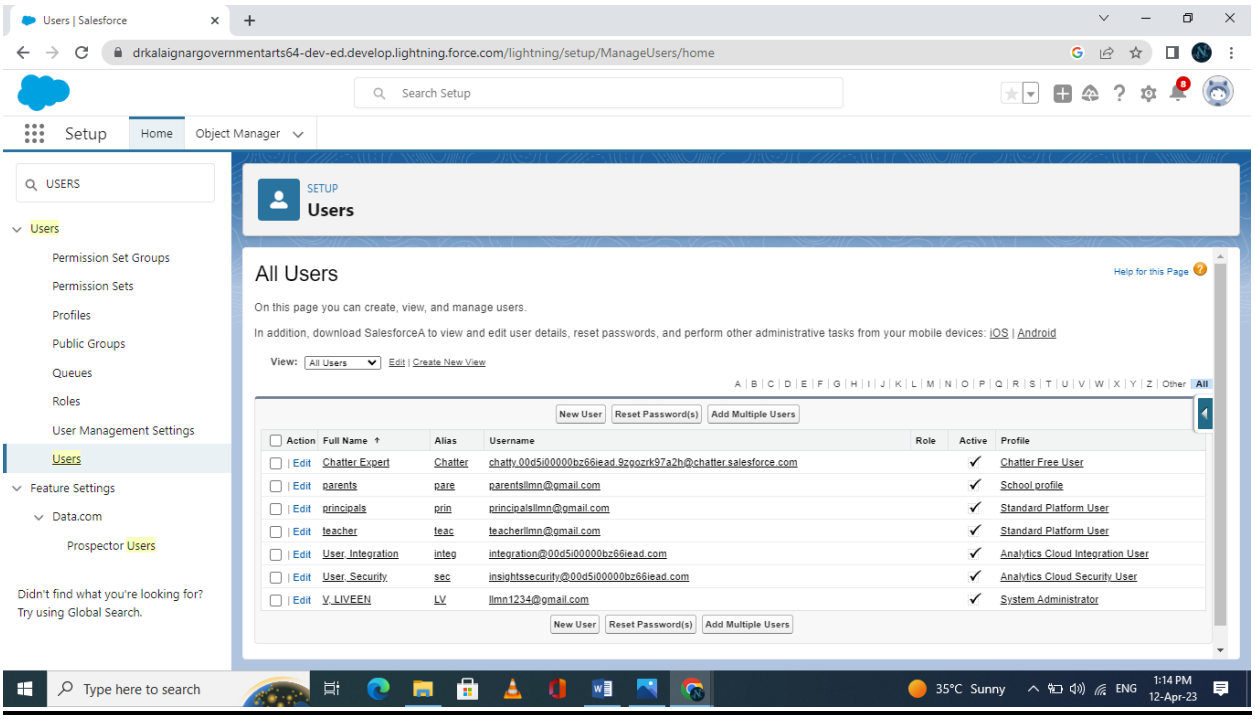
Milestone -5: Profile



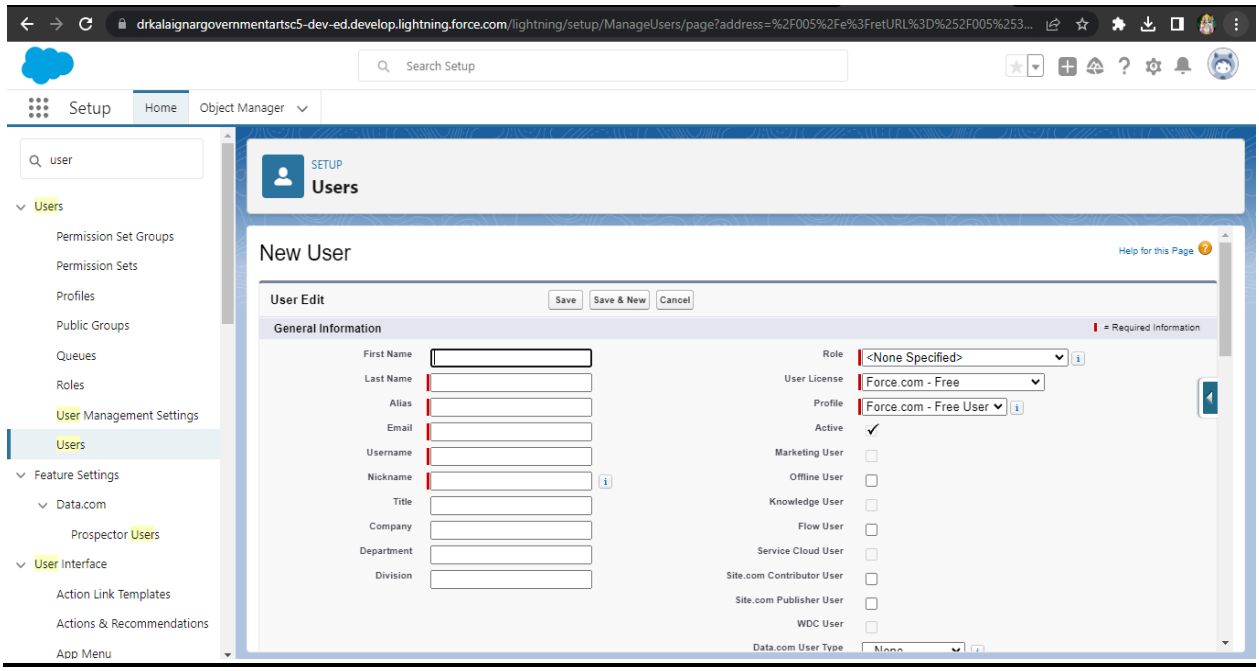
Creation on Profile:



Milestone - 6: Users



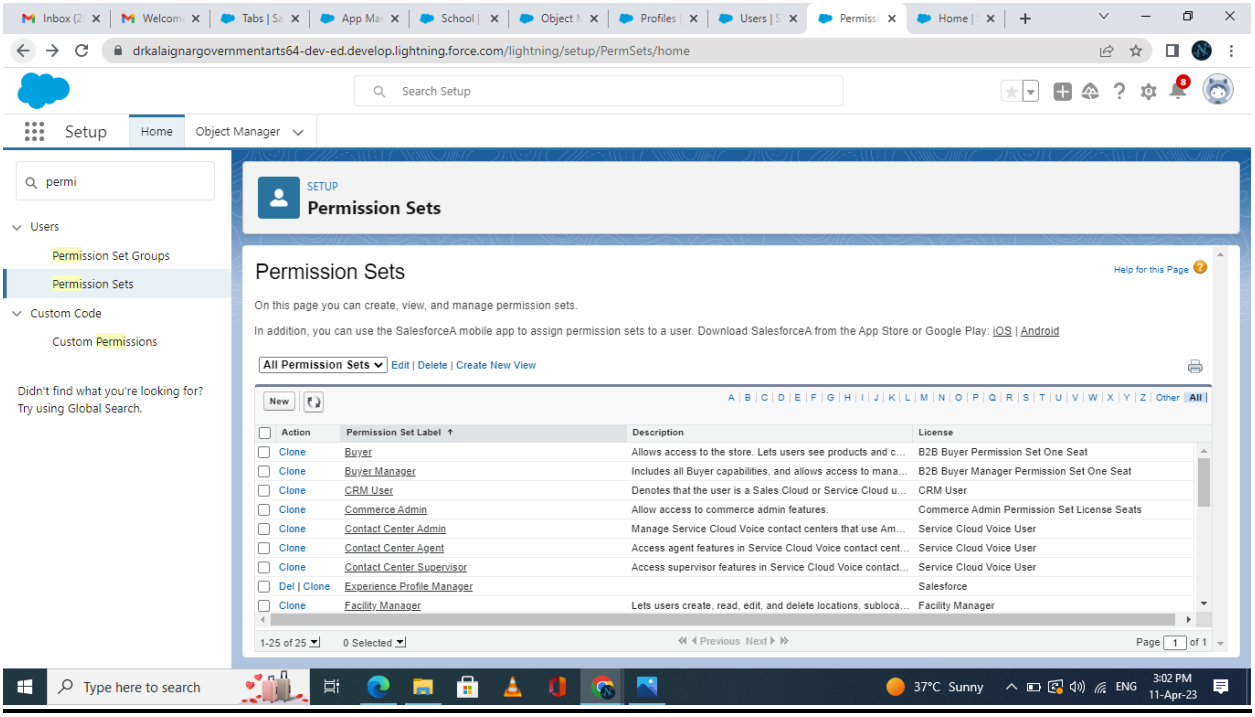
Creating a User's:

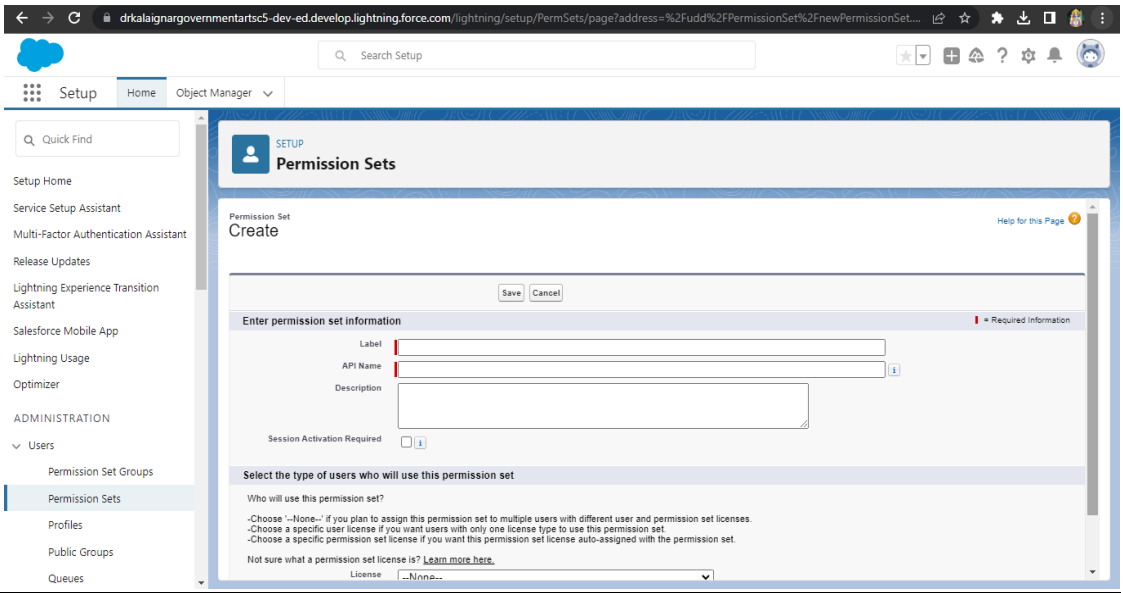


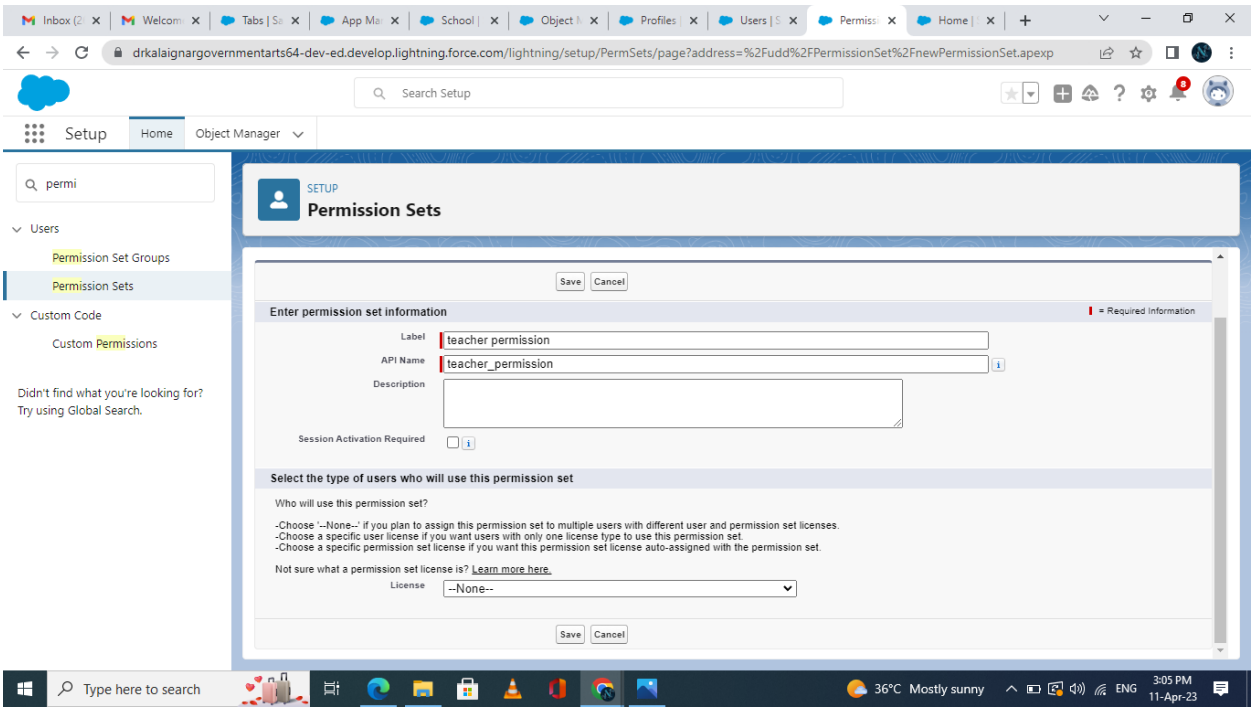
Milestone - 7: Permission Sets

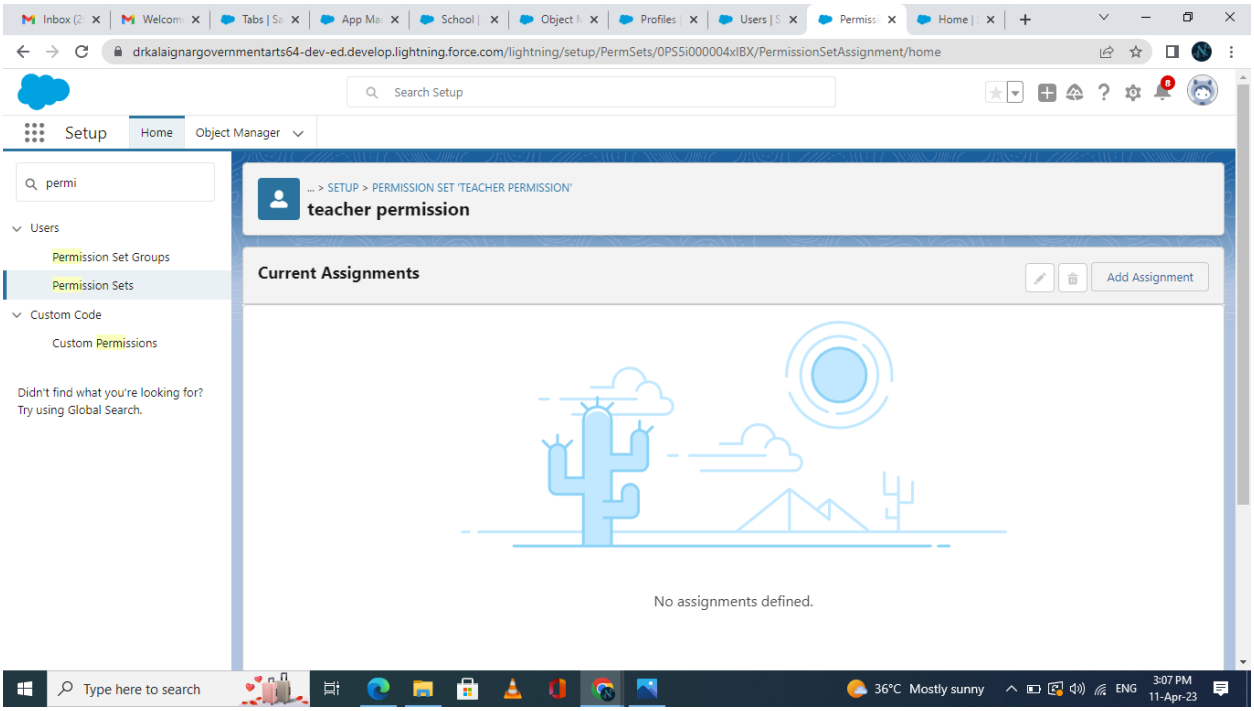
Activity – 1:

Permission Sets 1:



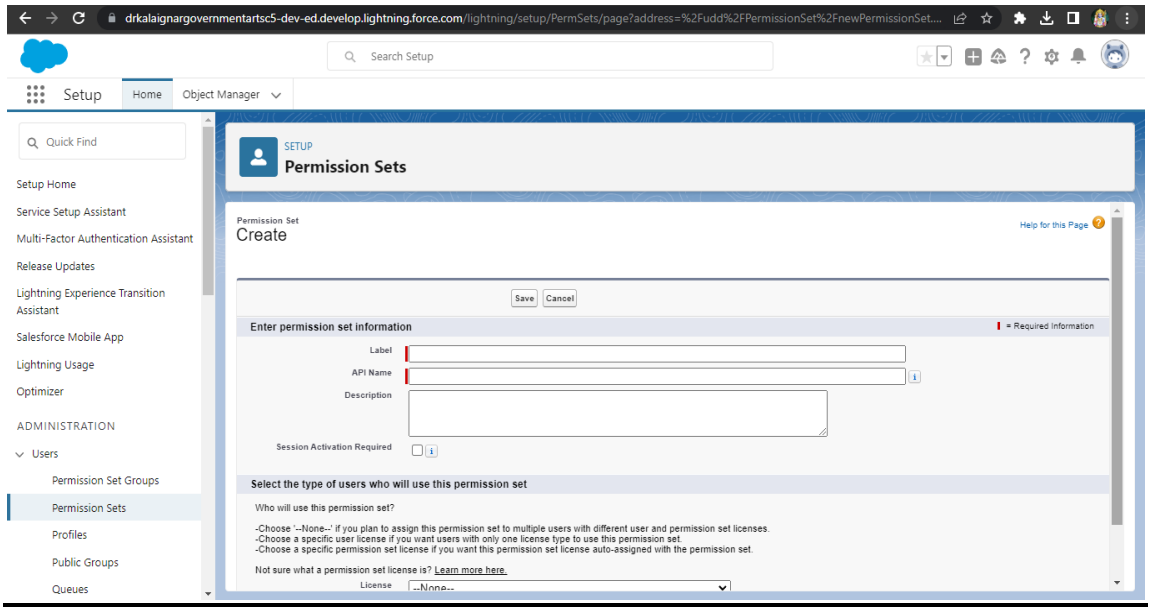


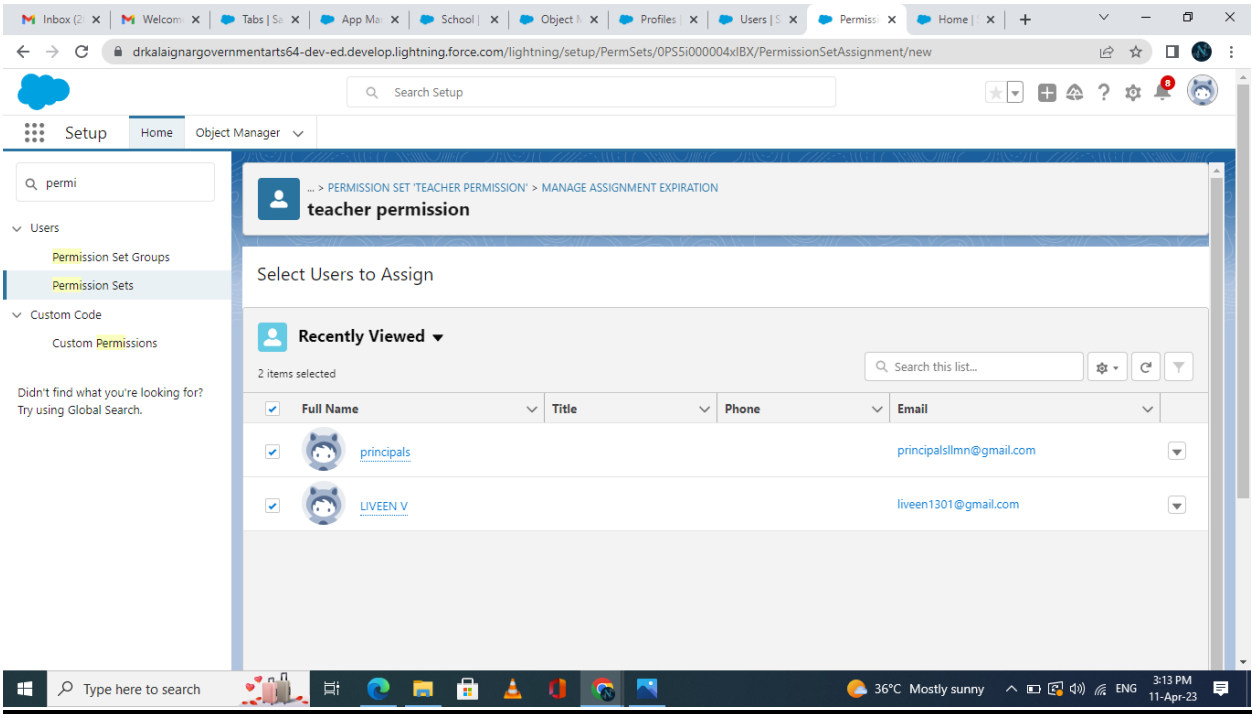

drkalaignargovernmentarts64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
Search Setup
Setup
Home
Object Manager
permi
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Save
Cancel
Enter permission set information
= Required Information
Label
teacher permission
API Name
teacher_permission
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save
Cancel
Type here to search
36°C Mostly sunny
ENG
3:05 PM
11-Apr-23


drkalaignargovernmentarts64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5i000004xIBX/PermissionSetAssignment/home
Search Setup
Setup
Home
Object Manager
permi
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for?
Try using Global Search.
... > SETUP > PERMISSION SET 'TEACHER PERMISSION'
teacher permission
Current Assignments
Add Assignment
No assignments defined.
Type here to search
36°C Mostly sunny
ENG
3:07 PM
11-Apr-23

Activity – 2:

Permission Sets 2:



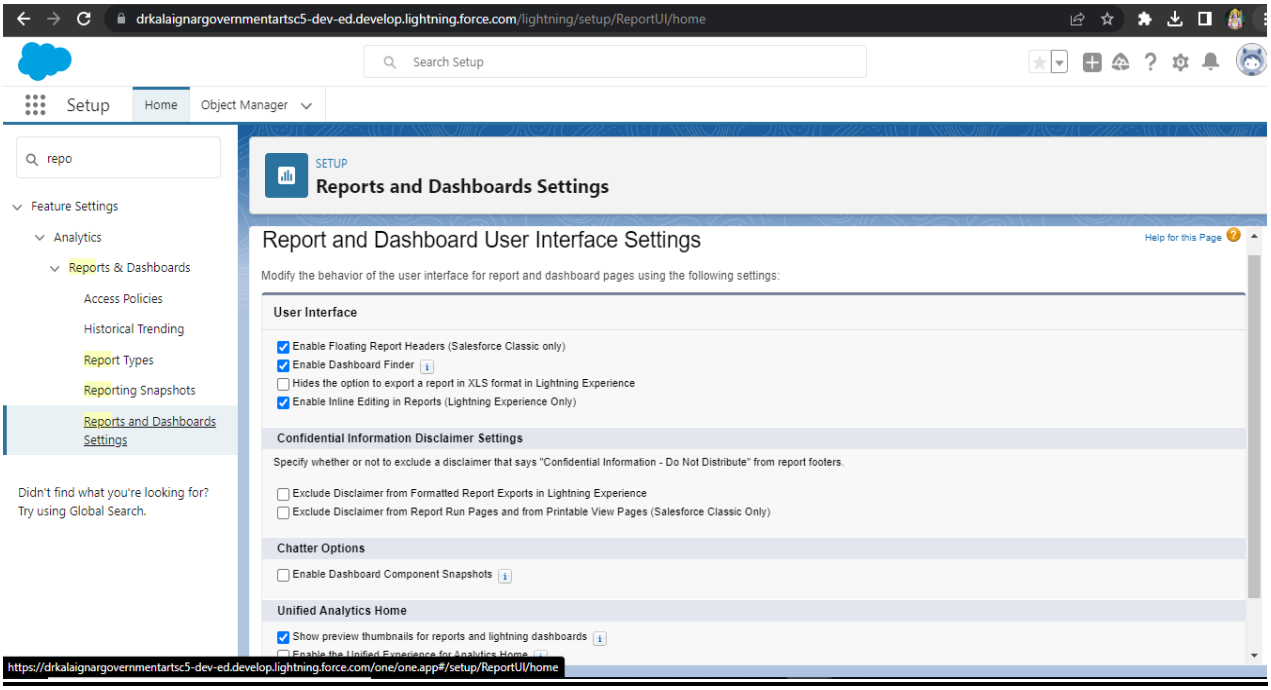


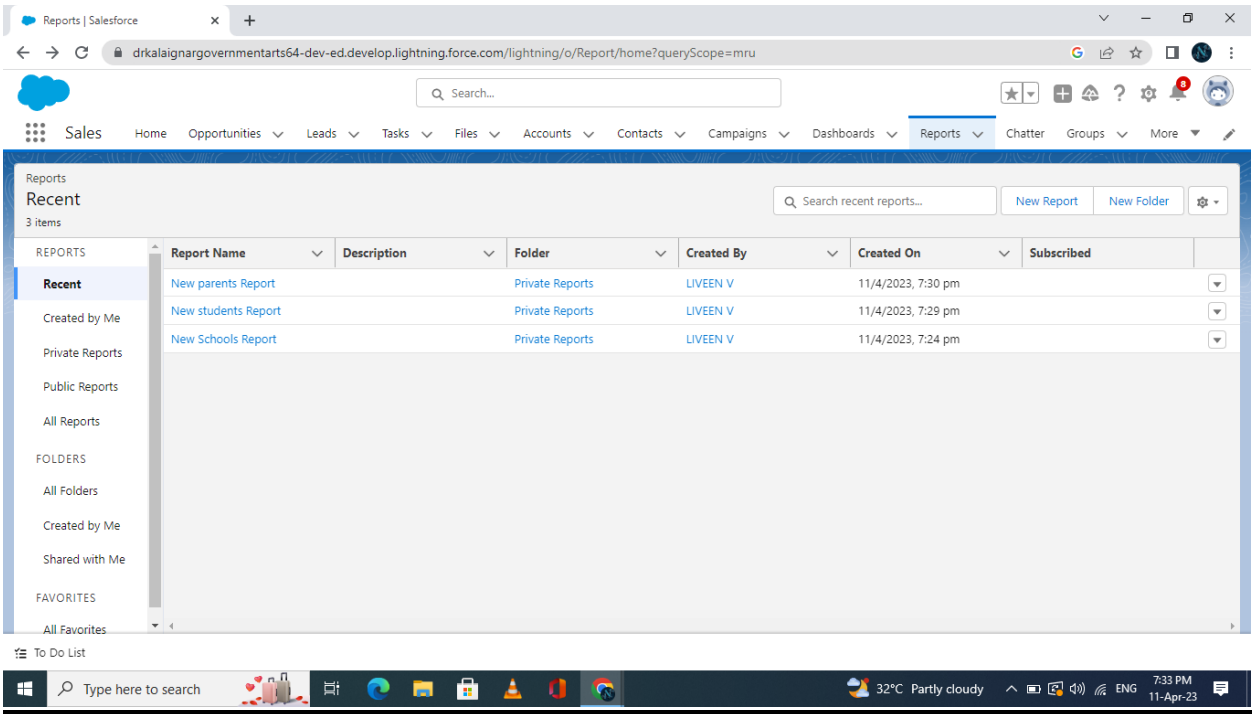
Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

Milestone - 8: Reports

Activity:

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.





Trailhead Profile Public URL

Team leader - https://trailblazer.me/id/f5e216c556545c5a6914af9d99439025

Team member 1 - https://trailblazer.me/id/a02c2c40ab1bcadb946e4aed830ab1edf

Team member 2 - https://trailblazer.me/id/m18fe72704e51ee3b1e74de2fd8084392

Team member 3 - https://trailblazer.me/id/f08b5ad605a5b81a2ca44aec519e762f

ADVANTAGES & DISADVANTAGES

Remember how businesses used to store customer information? In telephone books, Excel tables, diaries, card files. It was uncomfortable. All these carriers could be lost at a moment, and it was quite difficult to organize information in them or find it quickly. It was possible to restore the entire history of relationships with the client only from memory or by collecting all the records together.

Almost the same approach was used in education. The methodologists manually drew up timetables, all information about the students was stored in journals, and the educational process itself could not be imagined without a physical presence in the classroom. Fortunately, those days are over.

For everything to run like clockwork and to run quickly, it is necessary that information about each student and teacher be entered into a common database. In this case, the search for it should be fast, and the updating of information should be simple. All work tasks and timetables should also be kept in a convenient form and be easily available and modifiable at any time. All these functions and many others are implemented in modern CRM for the education industry.

CRM for higher educational institutions are customer relationship management systems. They include other functions for optimizing business

processes - you can find everything you need. It all depends on the needs of the company.

CRM usage in higher education has a wide range of powerful benefits. All processes, both educational and any others, must be recorded in a single information space, otherwise chaos cannot be avoided. Importance of CRM systems in higher education lies in:

- Customer accounting and complete information about the relationship with them;
- Marketing tools;
- Schedule of classes and information on the educational process, by student;
- Personal accounts of students and teachers with the ability to upload homework and receive feedback;
- Ability to create tasks, business processes and schedule work.

This is not a complete list of features that prove efficiency of CRM in managing students. There may be other functions, including non-standard ones, for the implementation of which developers can be involved.

The development of the online learning business is going fast these days and the competition for the consumer has become very intense. Many companies are no longer able to reduce their rates to attract customers - all that remains is to compete on the basis of quality indicators, including improved customer service and improved service levels. And this is just the area of CRM.

The CRM approach has a great future and advantages of CRM for educational organizations are undeniable. Advertising was once considered the engine of commerce. Today it is not enough to create an original course, it must be

customized, adapted to the needs of a particular individual. CRM allows you to close the entire cycle by "correct" work with the client. A company that has mastered CRM technology will be able to outstrip its competitors.

APPLICATION

- Customer relationship management (CRM) is **a set of integrated**, **data-driven software solutions_that help manage**, **track**, **and store information related to your company's current and potential customers**.
- CRM can analyze data and generate reports whenever required. There are mainly three types of CRM.

Applications-operational, **Analytical and Collaborative** to perform all these activities.

- Tracking customer's.
- A good CMR helps you understand your market and the needs of your customers As you
- Attract more customers.
- Collecting data for marketing.
- A CRM saves important data in extensive customers and contact lists. This makes to easy and efficient to market directly to them based on particular criteria.

CONCLUSION

- It would probably be particularly difficult to develop and install customer centric strategies.
- IF CMR used must be with the backing of those at the highest level and it must be planned carefully.
- A process must be gone through which would take note of CMR theory and use the experience of others to maximize the chances of success.

FUTURE SCOPE:

Although the model features customers at the heart, not all companies would agree. Reached Brandon and Bill Marriott have both claimed that their most important constituency is the internal customer, the employee. They both believe that if the employee is satisfied in her work they will give excellent service to their external customers - airline passengers and hotel guests respectively. Clearly the role of employee is that much more important in business where customer satisfaction is derived principally from the moment s of truth, in interaction with employees.

Sears, the US retail giant, has recently developed a management model which has calibrated the relationship between employee satisfaction, customer satisfaction and business performance. They estimate that a 5 unit increase in employee satisfaction provides a 1.3 unit increase in customer satisfaction which drives up revenue by 0.5%.

There are also other circumstances under which the external customer may not be the most important constituency. For examples, a company entering a new market may focus initially on building close relationships with distribution partner who can take on sales, logistics and customer service roles

Similarly, following acquisition there is based on mutual under understanding with the new owners.