

Dr. KALAINAR GOVERNMENT ARTS COLLEGE
KULITHALAI – 639120

DEPARTMENT OF MATHEMATICS

NAAN MUDHALVAN – SMART BRIDEG PROJECT

**PROJECT TITLE: A CRM Application for
Schools/Colleges**

SUBMITTED BY

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INDEX

S. NO	CONTENT	PAGE NO
1	INTRODUCTION	3
2	EMPATHY MAP	5
3	ACTIVITY & SCREENSHOT	7
4	Trailhead Profile Public URL	18
5	ADVANTAGES & DISADVANTAGES	18

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 tocustomize 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 Salesfoce cloud

managed by the college Administrator. This system will decrease 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 is 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.

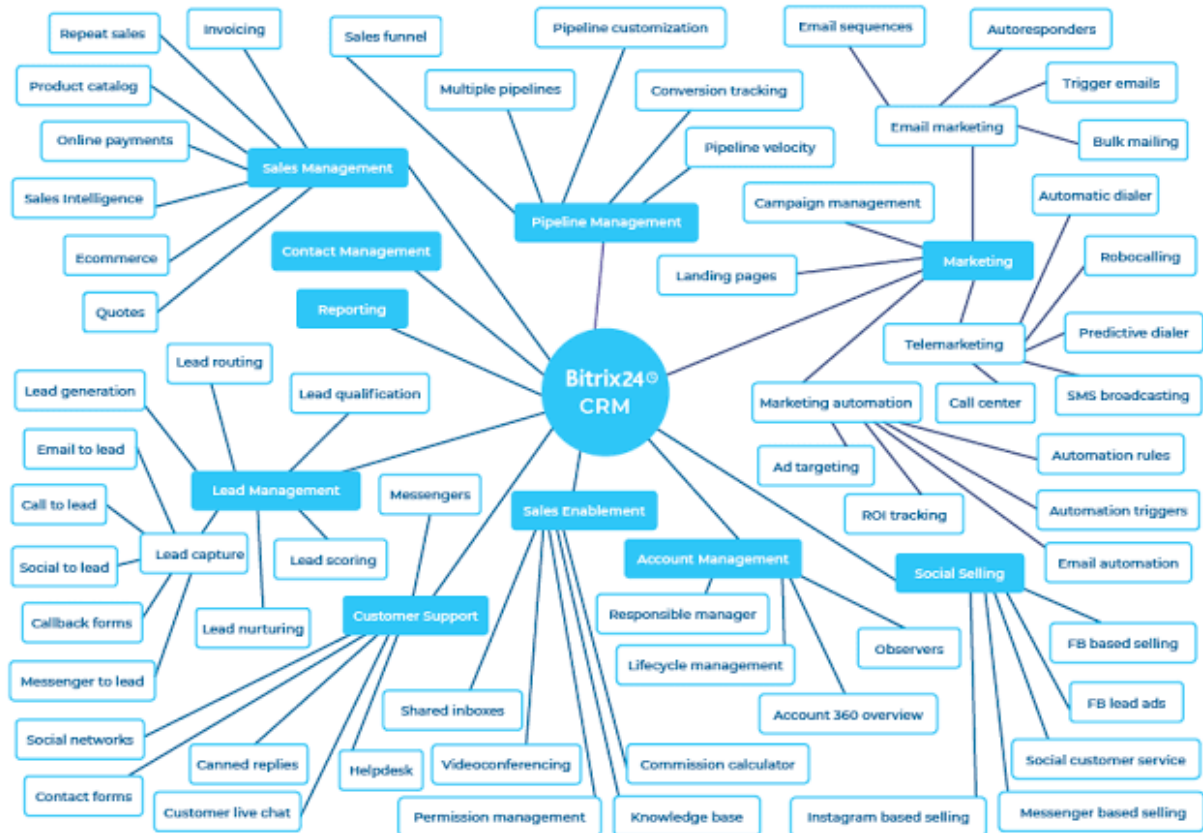
- Import data and test the app.

EMPATHY MAP



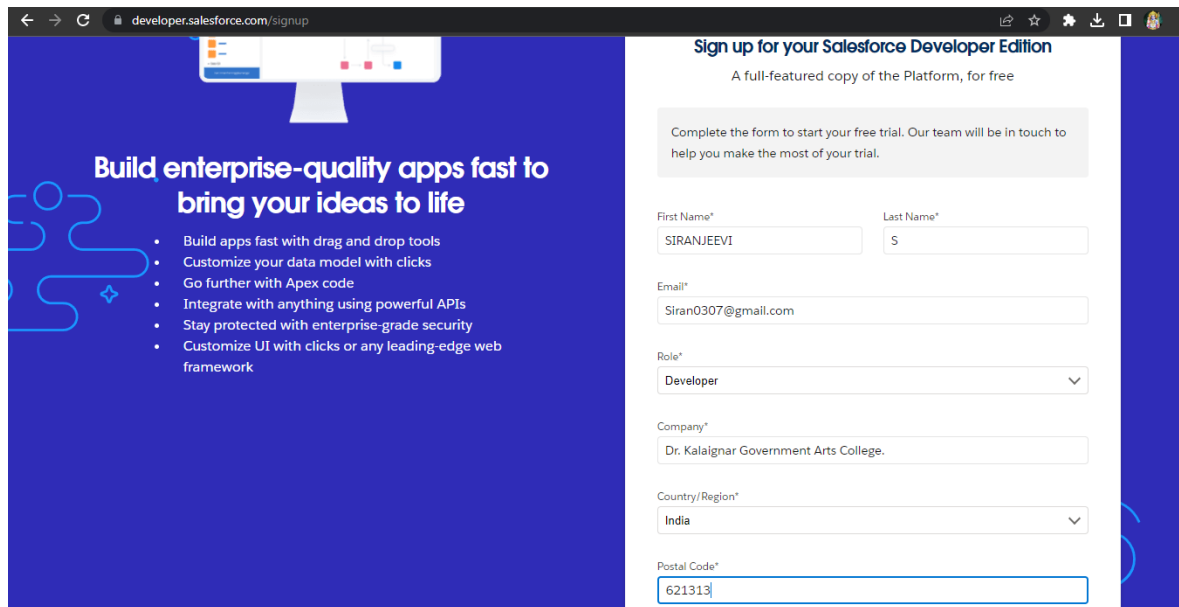
BRAIN STORMING MAP

Bitrix24 – The world's #1 free CRM used by over 4 million companies worldwide



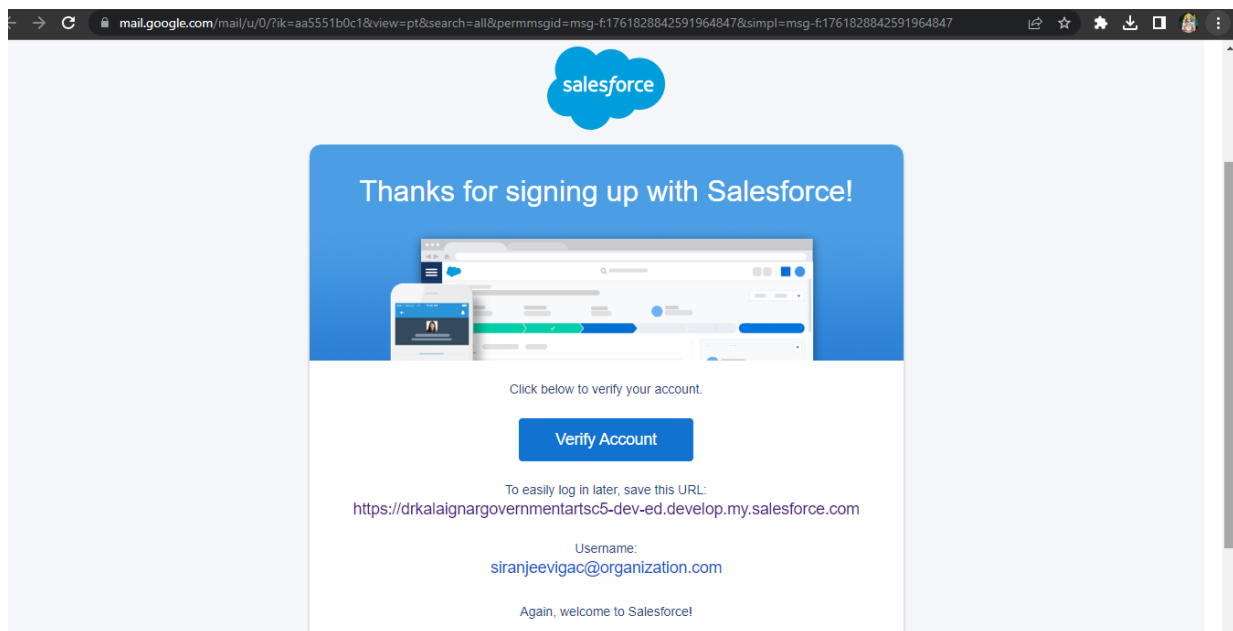
Milestone 1 – Create Salesforce Org :

Creating Developer Account Creating a developer org in salesforce.



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, a blue banner with white text reads: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a list of bullet points highlights features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, the sign-up form is titled "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". It includes a message: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name*" (SIRANJEEVI), "Last Name*" (S), "Email*" (Siran0307@gmail.com), "Role*" (Developer), "Company*" (Dr. Kalaignar Government Arts College), "Country/Region*" (India), and "Postal Code*" (621313).

Account Activation



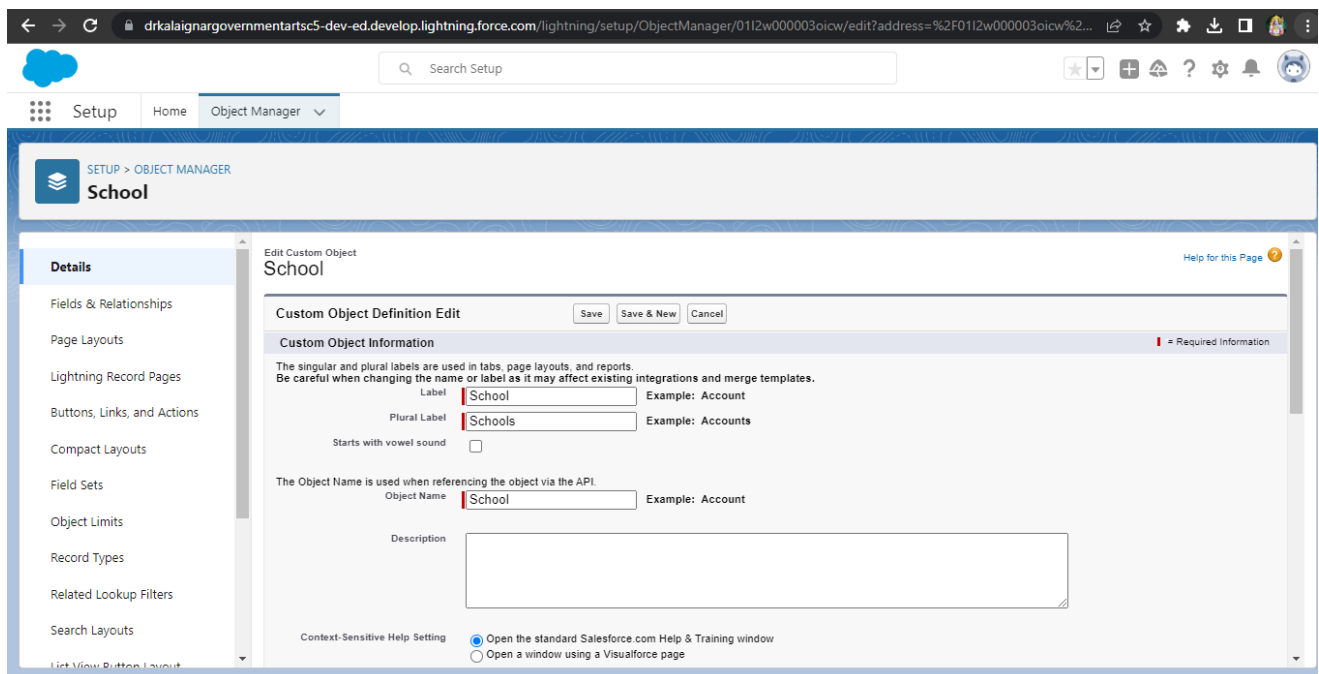
The screenshot shows an email from Salesforce with the subject "Thanks for signing up with Salesforce!". The email body features the Salesforce logo at the top, followed by the text "Thanks for signing up with Salesforce!". Below this, there is a blue button labeled "Verify Account". Under the button, it says "Click below to verify your account." and "To easily log in later, save this URL:". The URL provided is "https://drkalaignargovernmentartsc5-dev-ed.develop.my.salesforce.com". Below the URL, the "Username:" is listed as "siranjeevigac@organization.com". At the bottom, it says "Again, welcome to Salesforce!".

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.



The screenshot shows the Salesforce Setup interface for a custom object named 'School'. The browser address bar displays a URL from a development environment. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup categories, with 'Details' selected. The main content area is titled 'Edit Custom Object School' and contains the 'Custom Object Definition Edit' form. This form includes fields for 'Label' (School), 'Plural Label' (Schools), 'Object Name' (School), and a 'Description' text area. It also features a 'Starts with vowel sound' checkbox and a 'Context-Sensitive Help Setting' section with two radio button options. A red error message indicates that some required information is missing.

drkalaigovernmentartsc5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oicw/edit?address=%2F0112w000003oicw%2...

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
- List View Button Layout

Edit Custom Object
School

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label School Example: Account

Plural Label Schools Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name School Example: Account

Description

Context-Sensitive Help Setting

- ☒ Open the standard Salesforce.com Help & Training window
- ☐ Open a window using a Visualforce page

Activity 2 : Create Student Object

This picture belongs to Students object.

The screenshot shows the Salesforce Setup interface for the 'Students' custom object. The left sidebar contains a 'Details' menu with options like '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 'Edit Custom Object Students' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which contains the following fields: 'Label' (Students), 'Plural Label' (Students), 'Starts with vowel sound' (unchecked), 'Object Name' (Students), and 'Description' (empty text area). A note states: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' At the bottom, there are 'Context-Sensitive Help Setting' options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page' (unchecked). A red exclamation mark icon indicates required information.

Activity 3 : Create Parent object

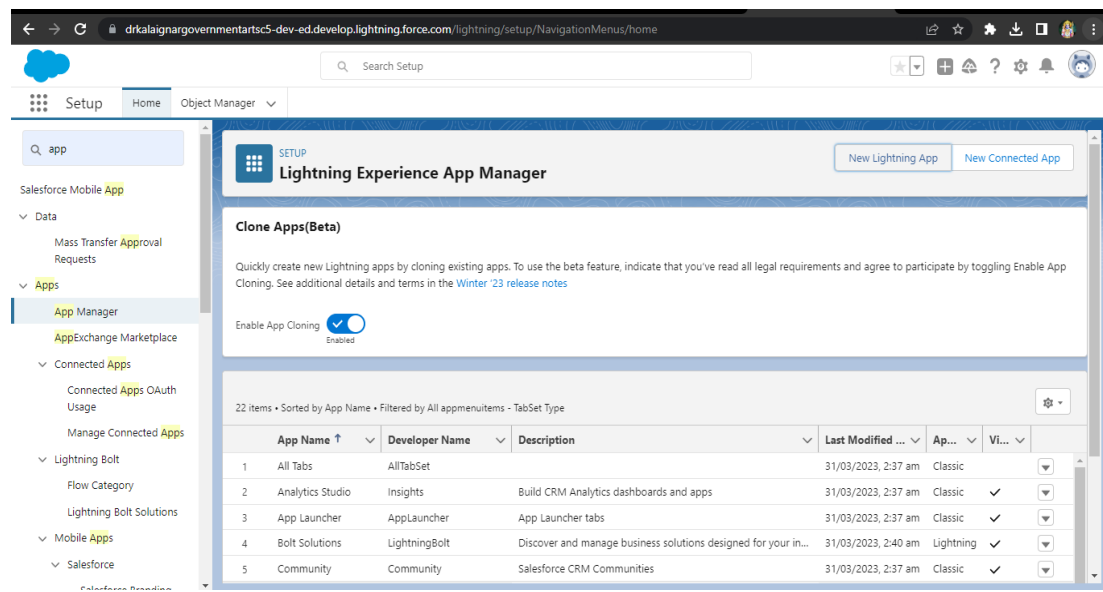
This picture belongs to School object.

The screenshot shows the Salesforce Setup interface for the 'Parent' custom object. The left sidebar contains a 'Details' menu with options like '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 'Edit Custom Object Parent' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which contains the following fields: 'Label' (Parent), 'Plural Label' (Parents), 'Starts with vowel sound' (unchecked), 'Object Name' (Parent), and 'Description' (empty text area). A note states: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' At the bottom, there are 'Context-Sensitive Help Setting' options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page' (unchecked). A red exclamation mark icon indicates required information.

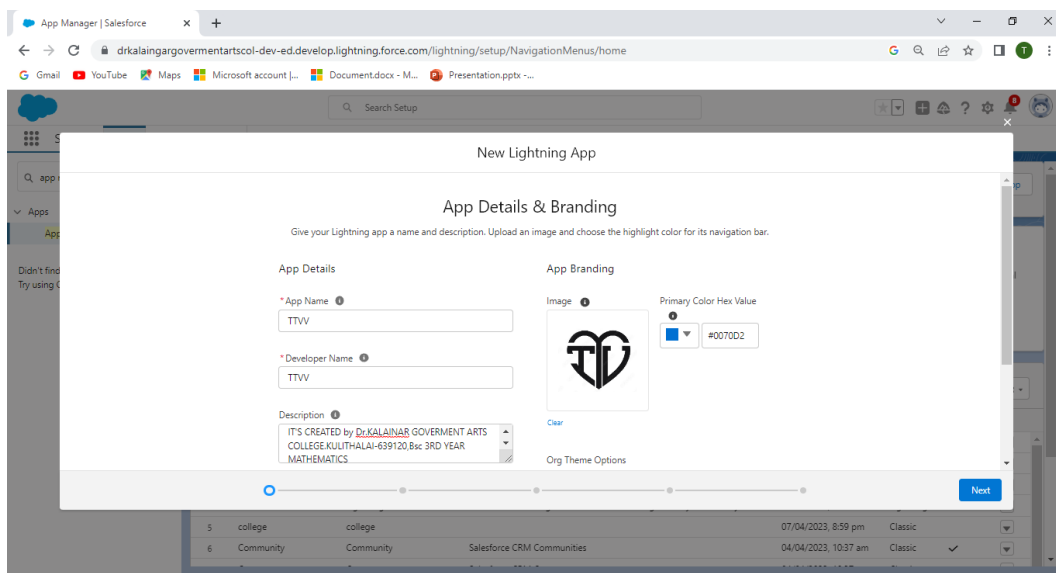
Milestone -3 : Lightning App

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:



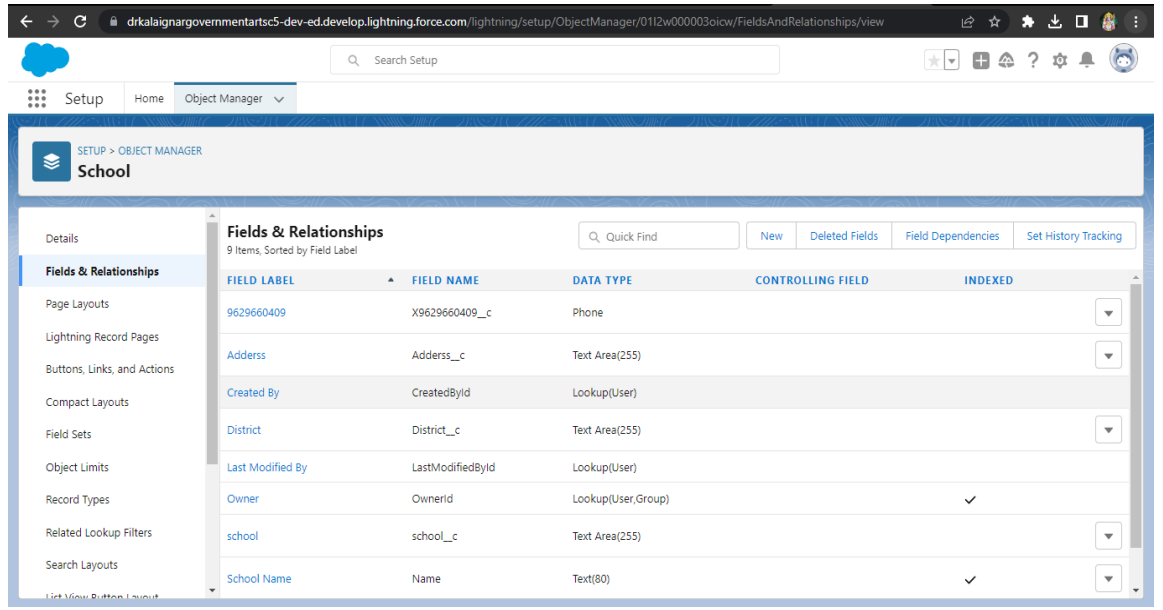
Create the School Management app



Milestone -4 : Fields and Relationship

Activity – 1 :

This is belongs to Fields & Relationship for School objects.

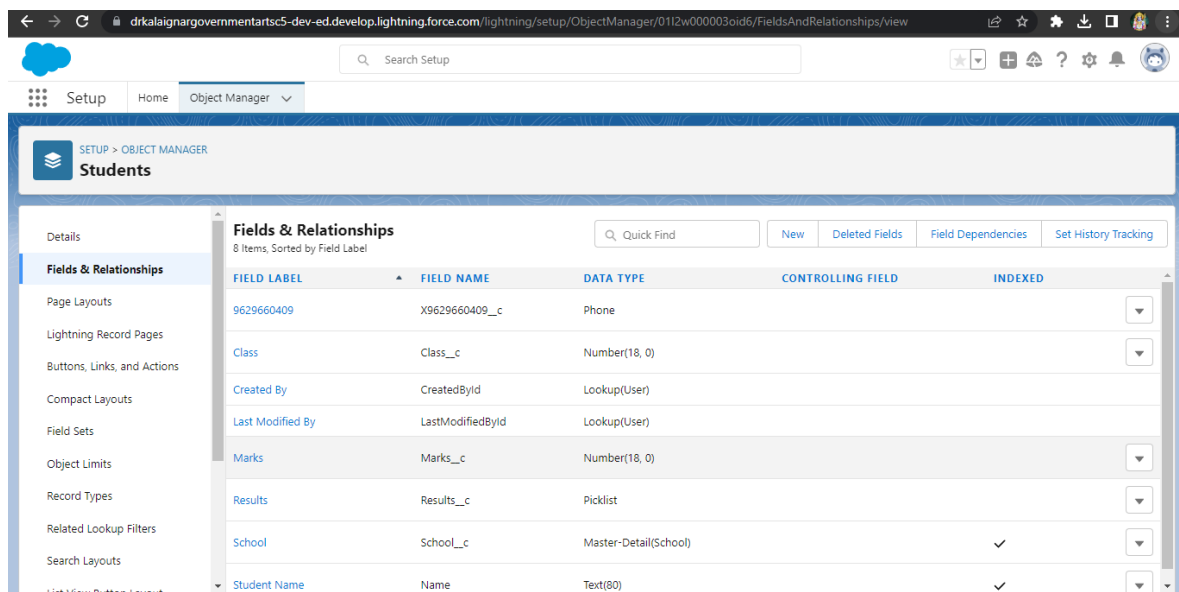


The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'School' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: 9629660409 (Phone), Addresss (Text Area(255)), Created By (Lookup(User)), District (Text Area(255)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), school (Text Area(255)), and School Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
9629660409	X9629660409__c	Phone		
Addresss	Addresss__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
school	school__c	Text Area(255)		
School Name	Name	Text(80)		✓

Activity – 2 :

This is belongs to Fields & Relationship for Students objects.



The screenshot shows the Salesforce Setup interface for the 'Students' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'Students' object, sorted by Field Label. The fields listed are: 9629660409 (Phone), Class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Marks (Number(18, 0)), Results (Picklist), School (Master-Detail(School)), and Student Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
9629660409	X9629660409__c	Phone		
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

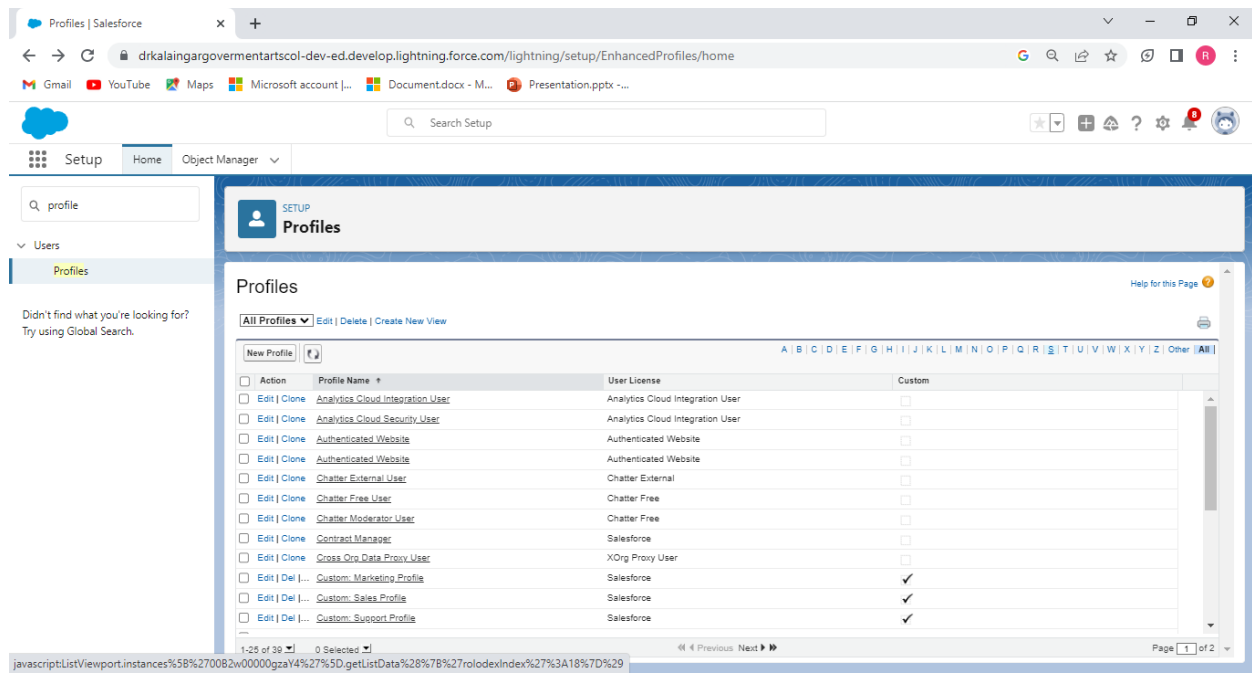
Activity – 3 :

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

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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 'Fields & Relationships' and shows a table of 6 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), Owner (OwnerId, Lookup(User,Group), indexed), Parent Address (Parent_Address__c, Text Area(255)), Parent Name (Name, Text(80), indexed), and Parent Number (Parent_Number__c, Phone). Above the table are buttons for New, Deleted Fields, Field Dependencies, and Set History Tracking. A search bar labeled 'Quick Find' is also present.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

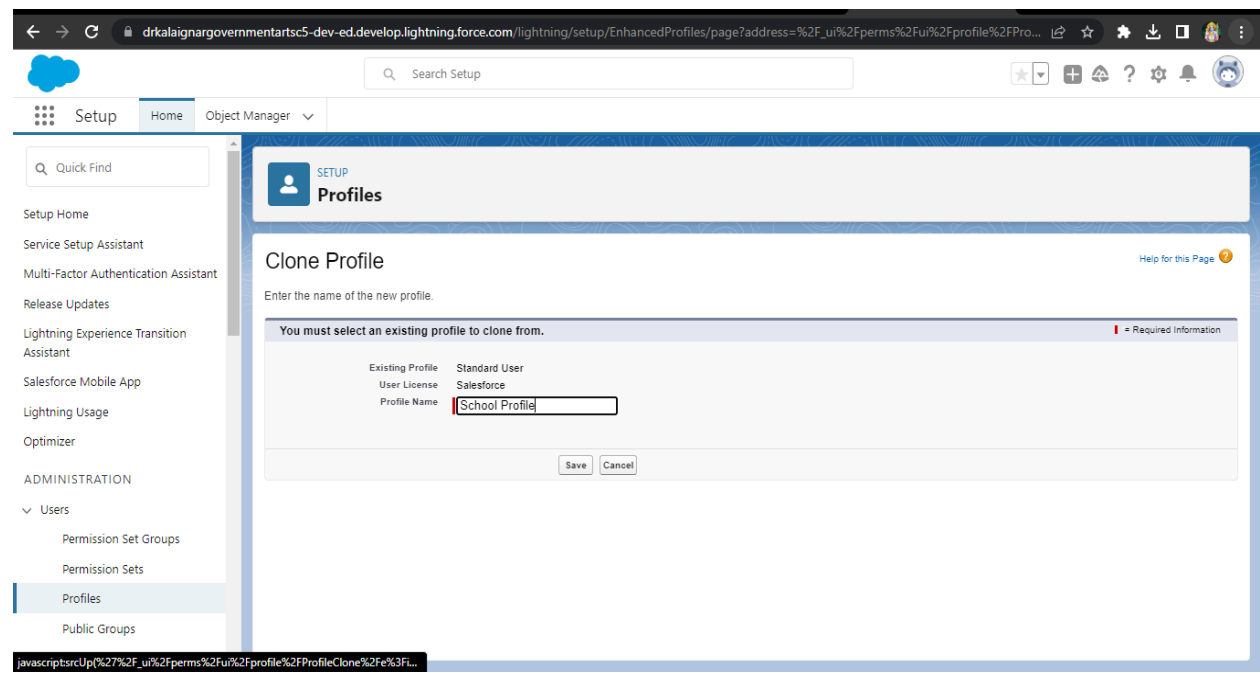
Milestone -5 : Profile



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists various profiles including Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, and Custom Support Profile. The Custom column has checkboxes for each profile, with the last three profiles (Custom Marketing, Custom Sales, and Custom Support) having their checkboxes checked.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>

Creation on Profile :



The screenshot shows the Salesforce Setup interface for the Clone Profile dialog. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays a form titled "Clone Profile" with a prompt to "Enter the name of the new profile." Below the prompt, there is a section titled "You must select an existing profile to clone from." which contains a table with columns for Existing Profile, User License, and Profile Name. The table lists "Standard User" and "Salesforce" as existing profiles. The Profile Name field is filled with "School Profile". The dialog has "Save" and "Cancel" buttons at the bottom.

Existing Profile	User License	Profile Name
Standard User	Salesforce	School Profile

Milestone - 6 : Users

[illegible]

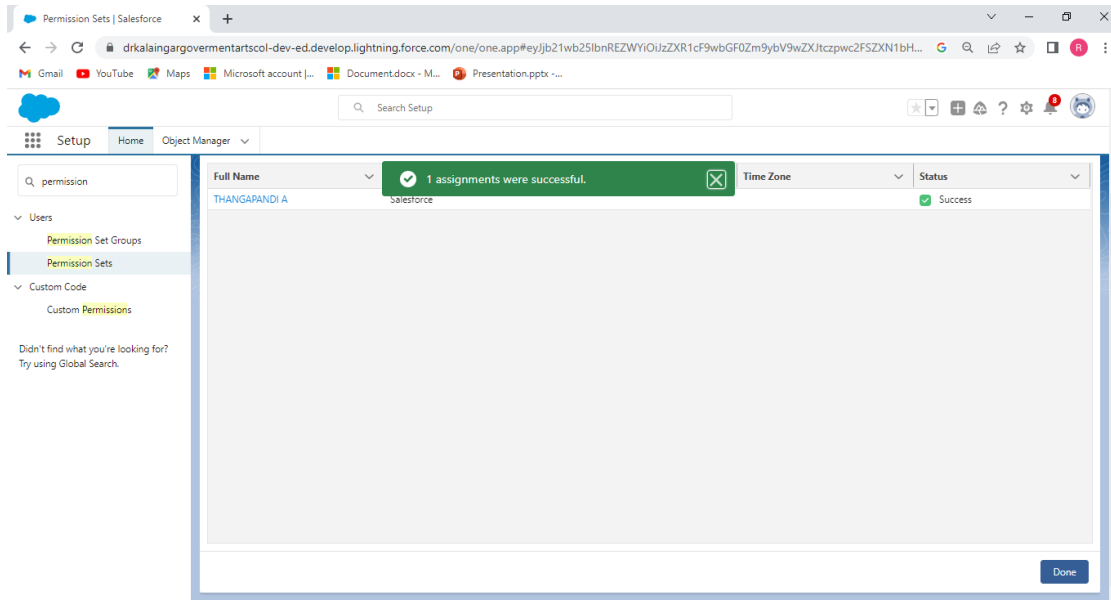
Creating a Users :

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' item is selected. Below it, there are links for 'Feature Settings' and 'Data.com', and a 'Prospector Users' link. The main content area is titled 'Users' and contains a 'User Edit' form. The form has a 'General Information' section with fields for First Name (THANGAPANDI), Last Name (A), Alias (ta), Email (tgapandimtp50@gmail.com), Username (thangapandimtp50@gmail), Nickname (User168120568897845404), Title (salesforce), Company (TTVV), Department (marketing), and Division (1). There is also a 'Role' dropdown menu set to 'Channel Sales Team', a 'Profile' dropdown menu set to 'Salesforce', and a 'Marketing User' checkbox that is checked. Other options include 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Data.com User Type' (set to 'None'), 'Data.com Monthly Addition Limit' (set to 'Default Limit (300)'), 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', and 'Lead Lightning Paces While Scrolling'.

Permission Sets 1 :

Activity – 2 :

Permission Sets 2 :

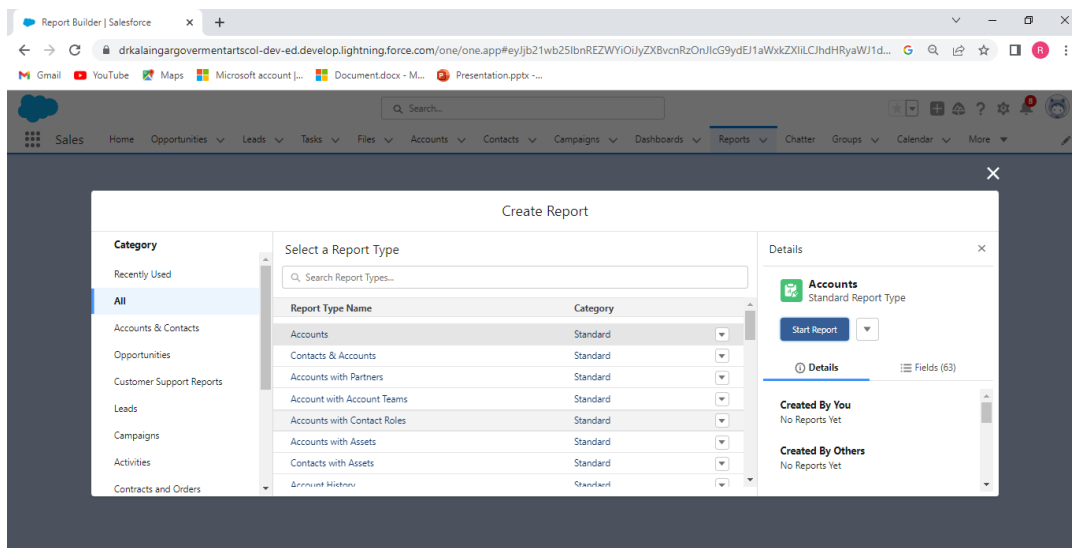


Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

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.



Report Accounts
SALESFORCE-A CRM APPLICATIONS COLLEGES

Total Records: 12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	THANGAPANDI A	University of Arizona	AZ	Customer - Direct	Warm	04/04/2023
2	-	THANGAPANDI A	sForce	CA	-	-	04/04/2023
3	-	THANGAPANDI A	United Oil & Gas Corp.	NY	Customer - Direct	Hot	04/04/2023
4	-	THANGAPANDI A	United Oil & Gas, UK	UK	Customer - Direct	-	04/04/2023
5	-	THANGAPANDI A	GenePoint	CA	Customer - Channel	Cold	04/04/2023
6	-	THANGAPANDI A	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	04/04/2023
7	-	THANGAPANDI A	Express Logistics and Transport	OR	Customer - Channel	Cold	04/04/2023
8	-	THANGAPANDI A	Dickerson plc	KS	Customer - Channel	-	04/04/2023
9	-	THANGAPANDI A	Pyramid Construction Inc.	-	Customer - Channel	-	04/04/2023
10	-	THANGAPANDI A	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	04/04/2023
11	-	THANGAPANDI A	Edge Communications	TX	Customer - Direct	Hot	04/04/2023
12	-	THANGAPANDI A	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	04/04/2023

Trailhead Profile Public URL

Team Leader - <https://trailblazer.me/id/thangam10>

Team Member 1 - <https://trailblazer.me/id/tsenthil6>

Team Member 2 - <https://trailblazer.me/id/vel10>

Team Member 3 - <https://trailblazer.me/id/vig10>

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.