

CSI COLLEGE OF ENGINEERING KETTI

NAAN MUDHALVAN PROJECT

COLLEGE CODE: 7106

**PROJECT TITLE : A CRM APPLICATION TO MANAGE
THE SERVICES OFFERED BY AN INSTITUTION**

TEAM MEMBERS:

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A CRM Application to manage the services offered by an Institution

Project Overview

The CRM Application for Institutional Services Management is a software solution designed to centralize, streamline, and automate the management of services offered by an institution. Built on Salesforce, it provides a unified platform to handle customer interactions, monitor service delivery, and enhance communication between staff and customers. The application ensures data accuracy, improves operational efficiency, and supports real-time decision-making with insightful reports and dashboards.

Objectives

1. Real-Time CRM Implementation

Learn to build and configure a Salesforce-based CRM system tailored to manage institutional services using real-world scenarios.

2. Data Modeling

Design and implement custom objects, fields, and relationships to represent services, customers, and interactions within the Salesforce data model.

3. Creating an Application

Develop a custom Lightning App with tabs, page layouts, and specific configurations to meet business needs.

4. User Interface Customization

Customize the UI using page layouts, record types, and tabs to provide a seamless experience for institutional staff.

5. Bulk Data Import

Use Salesforce Data Import Wizard or Data Loader for efficient migration of large data sets, simulating real-world data scenarios.

6. Security Implementation

Apply role-based access control, permission sets, profiles, and organization-wide default (OWD) settings to protect sensitive information.

7. Group Collaboration

Leverage Salesforce Chatter for enhanced communication and coordination between teams.

8. Reports and Dashboards

Generate reports and dashboards to monitor service performance, customer interactions, and overall efficiency.

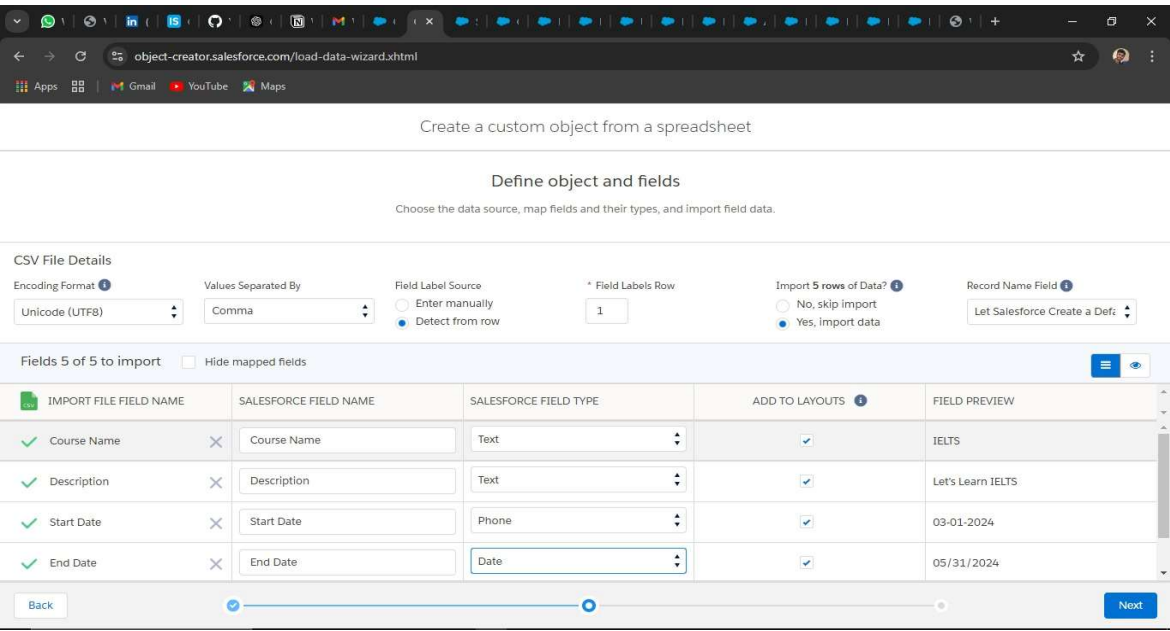
Key Features and Concepts Utilized

- 1. **Centralized Management:** A single source of truth for all institutional services and customer interactions.
- 2. **Improved Productivity:** Automation of repetitive tasks allows teams to focus on strategic objectives.
- 3. **Enhanced Data Accuracy:** Real-time synchronization ensures data integrity.
- 4. **Advanced Security:** Role-based permissions safeguard sensitive information.
- 5. **Data-Driven Decision-Making:** Dashboards and reports provide actionable insights.

Solution Design

1. Data Model Documentation

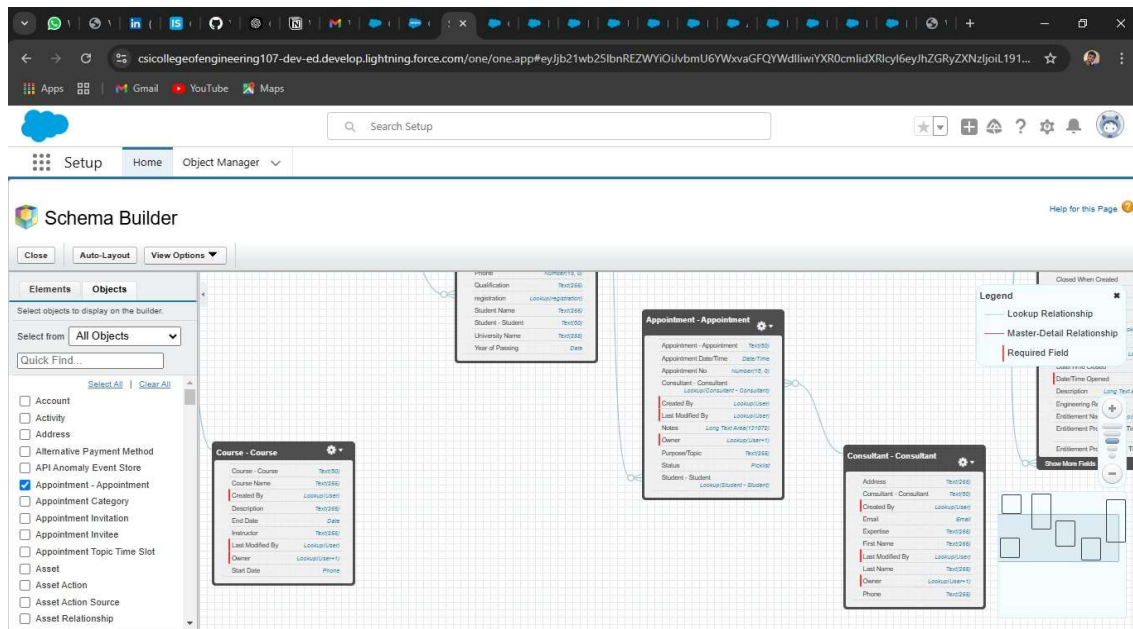
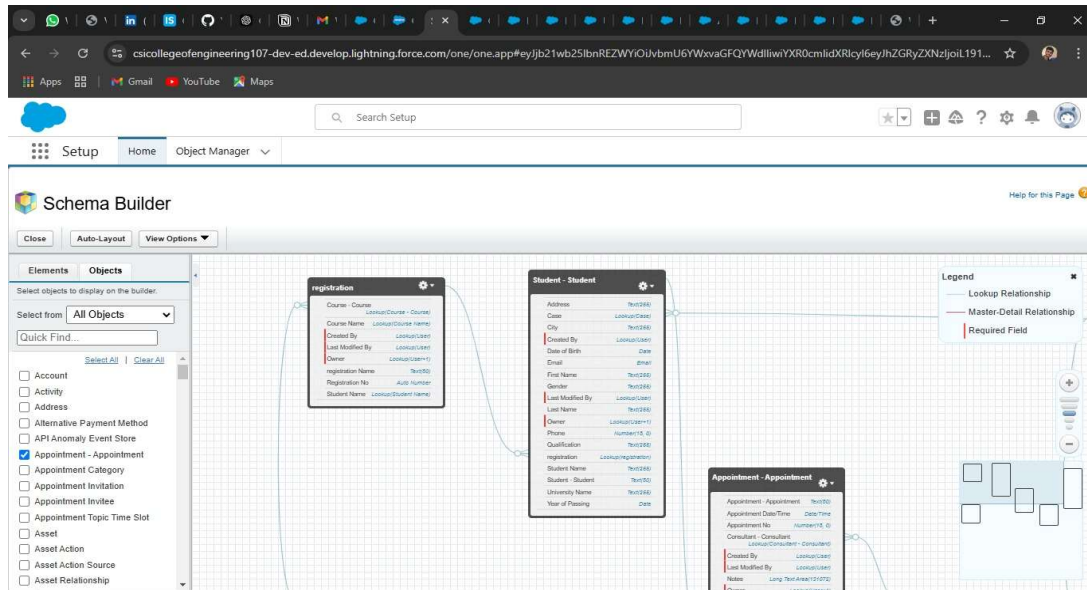
Create an entity-relationship diagram (ERD) showcasing custom objects (e.g., Customer, Service, Feedback) and their relationships. Define fields with data types and validation rules, and document relationships (e.g., lookup, master-detail).

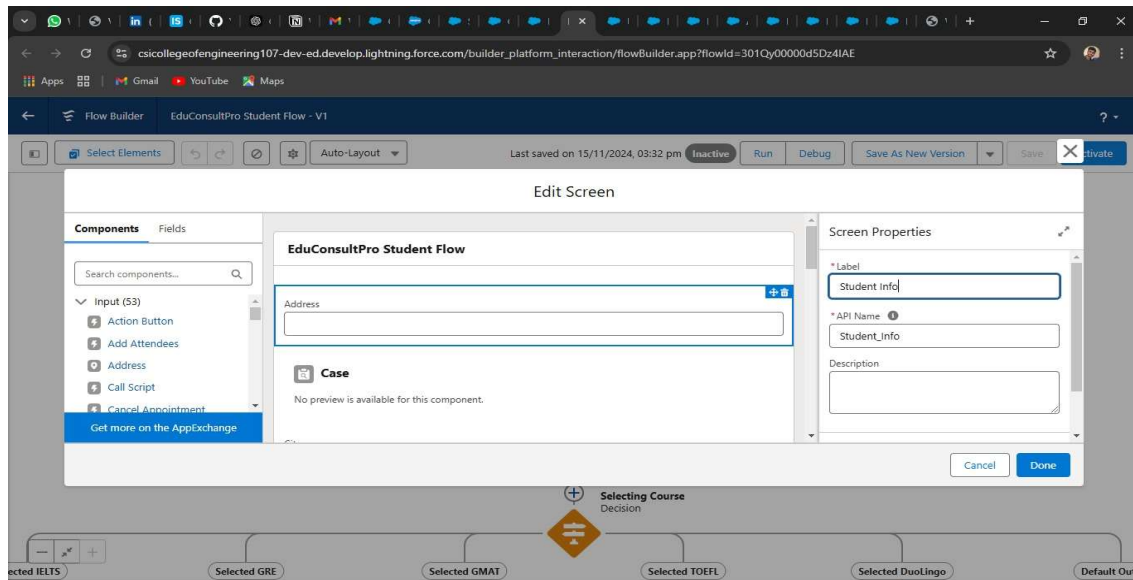


2. User Interface Design Documentation

- **Lightning App Design:** Include screenshots of the homepage and descriptions of tabs like Service, Customer, and Feedback.

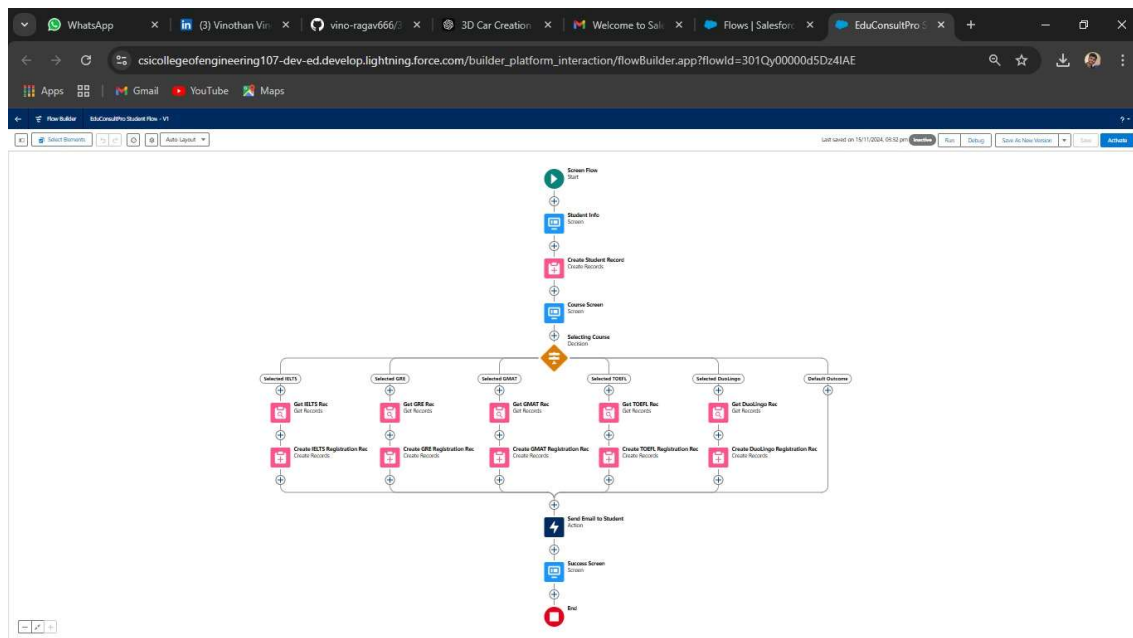
- **Custom Tabs:** Highlight features like search, list views, and detailed record layouts.
- **Page Layouts:** Detail field groupings and their purposes, supported with annotated screenshots.

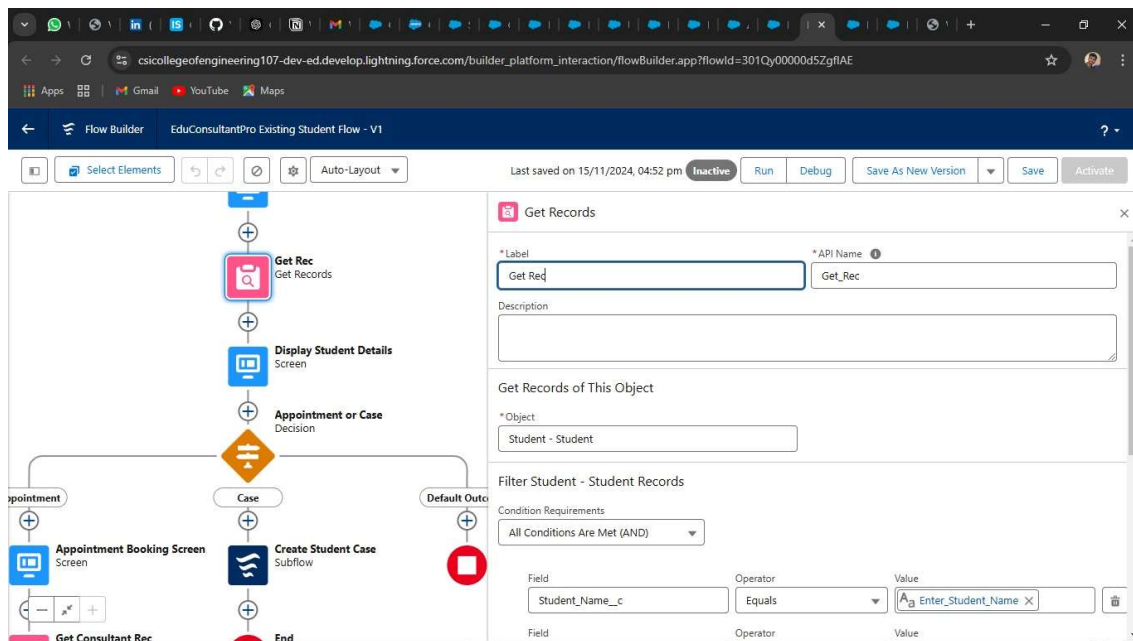




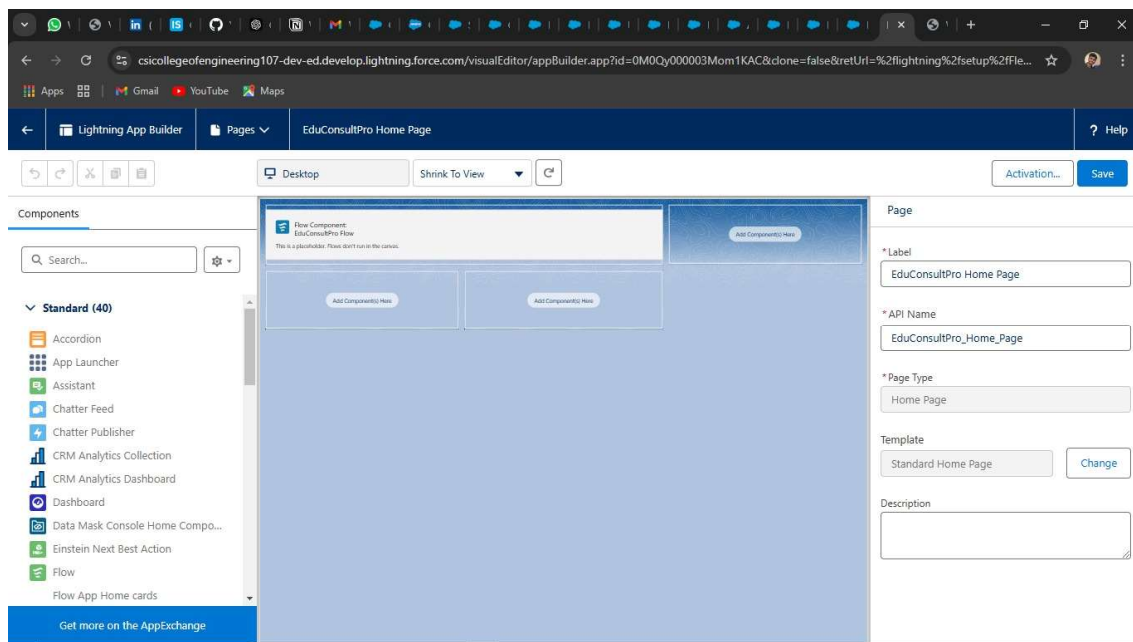
3. Business Logic Documentation

- **Apex Triggers:** Automate updates such as service status changes. Provide descriptions and code snippets.
- **Approval Processes:** Use flowcharts to illustrate stages (e.g., customer feedback review).
- **Workflow Rules:** Automate notifications for critical events (e.g., service delivery completion).





- **Process Builder and Flow:** Document automated flows, including diagrams and screenshots



Conclusion

The implementation of this CRM application has successfully enhanced the institution's ability to manage services efficiently. By centralizing data, automating workflows, and ensuring robust security, the platform empowers staff to focus on delivering excellent services. Customizable dashboards and real-time insights further enable data-driven decision-making, ensuring the institution remains adaptive and customer-focused. This project highlights Salesforce's capability in transforming institutional operations through digital innovation.