

## A CRM APPLICATION FOR SCHOOLS AND COLLEGES



## A CRM APPLICATION FOR SCHOOLS AND OLLEGES

<b><u>TEAM ID</u></b>	<b>NM2003TMID03633</b>
<b>PROJECT NAME</b>	<b>A CRM APPLICATION FOR SCHOOLS AND COLLEGES</b>
<b>TEAM LEADER</b>	<b>ABINAYA R</b>
<b>TEAM MEMBER</b>	<b>SRIRAMKUMAR K AKATHIYA M ASHWINI A</b>



## 1.INTRODUCTION

### 1.1 Over view:

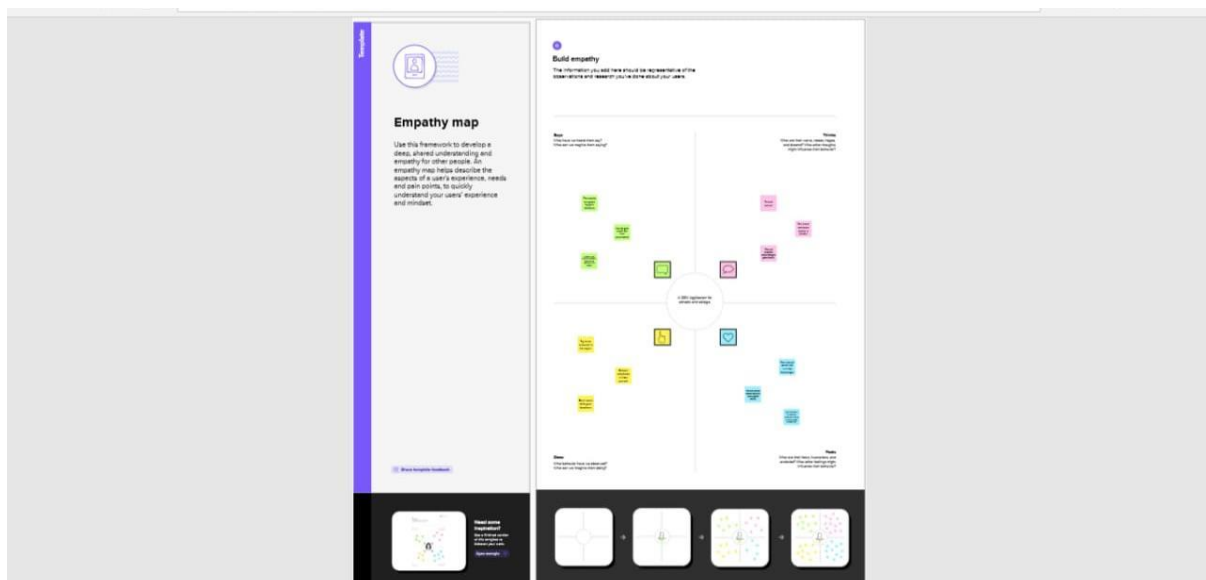
One of the main issue in management of educational institutions, including schools is to increase the level of education and methodological work of a particular institutions

### 1.2 purpose:

The main advantages of such technologies are performing various types of educational work, control, and evaluation of knowledge online.

## 2.PROBLEM DEFINITION &DESING THINKING

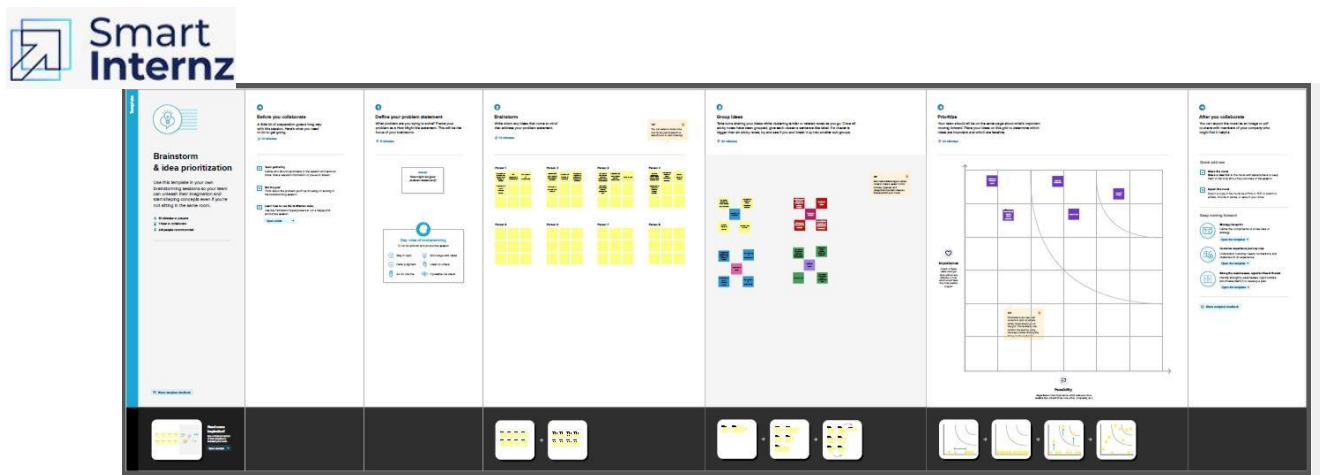
### 2.1 Empathy map:



## A CRM APPLICATION FOR SCHOOLS AND COLLEGES



### 2.2 Ideation & brainstorming map:



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OBJECT	FILEDS ON THE OBJECT	
	FILED LABLE	DATA TYPE
school	address	text area
Student	Phone number	phone
parent	address	Text area

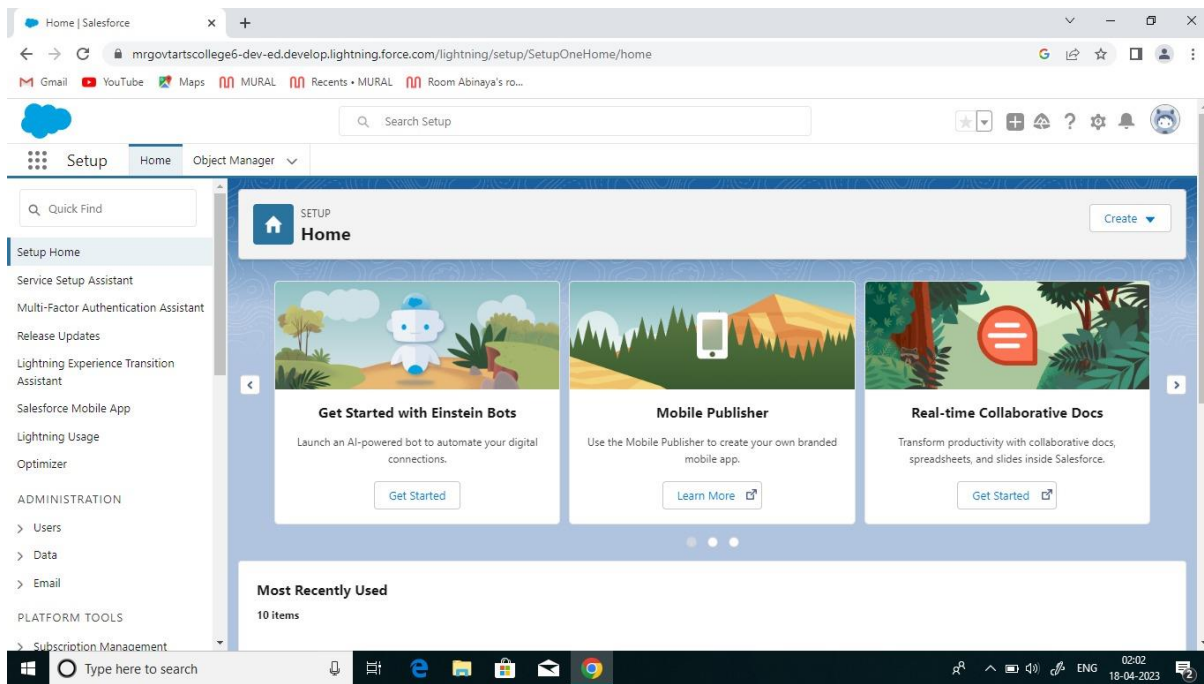
### 3.2 Activity &Screenshot

#### Milestone 1:

## A CRM APPLICATION FOR SCHOOLS AND COLLEGES



## A CRM,APPLICATION FOR SCHOOLS AND COLLEGES



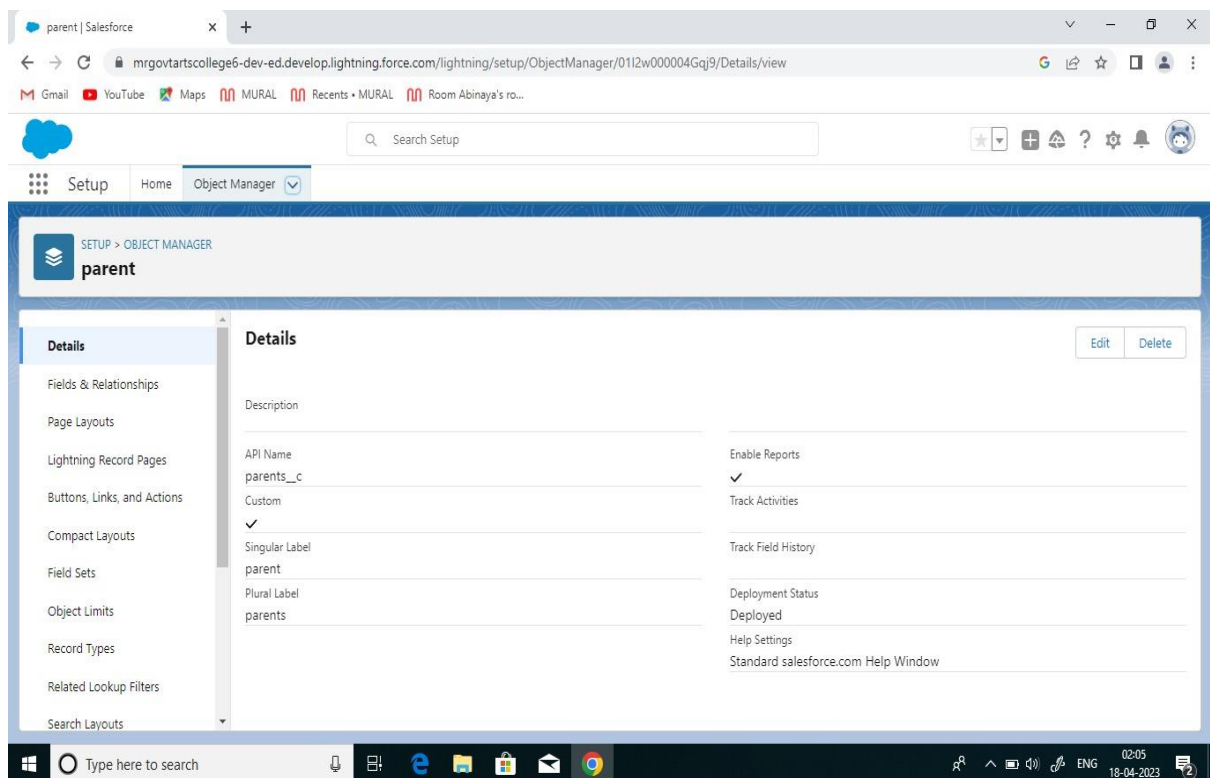
## Creation Of salesforce Account

## A CRM APPLICATION FOR SCHOOLS AND COLLEGES



## A CRM APPLICATION FOR SCHOOLS AND COLLEGES

### Milestone 2:





ON FOR SCHOOLS AND COLLEGES

school | Salesforce

mrgovtartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Ggiu/Details/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

**Details**

Description

API Name  
schools\_\_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

Edit Delete

Microsoft Store

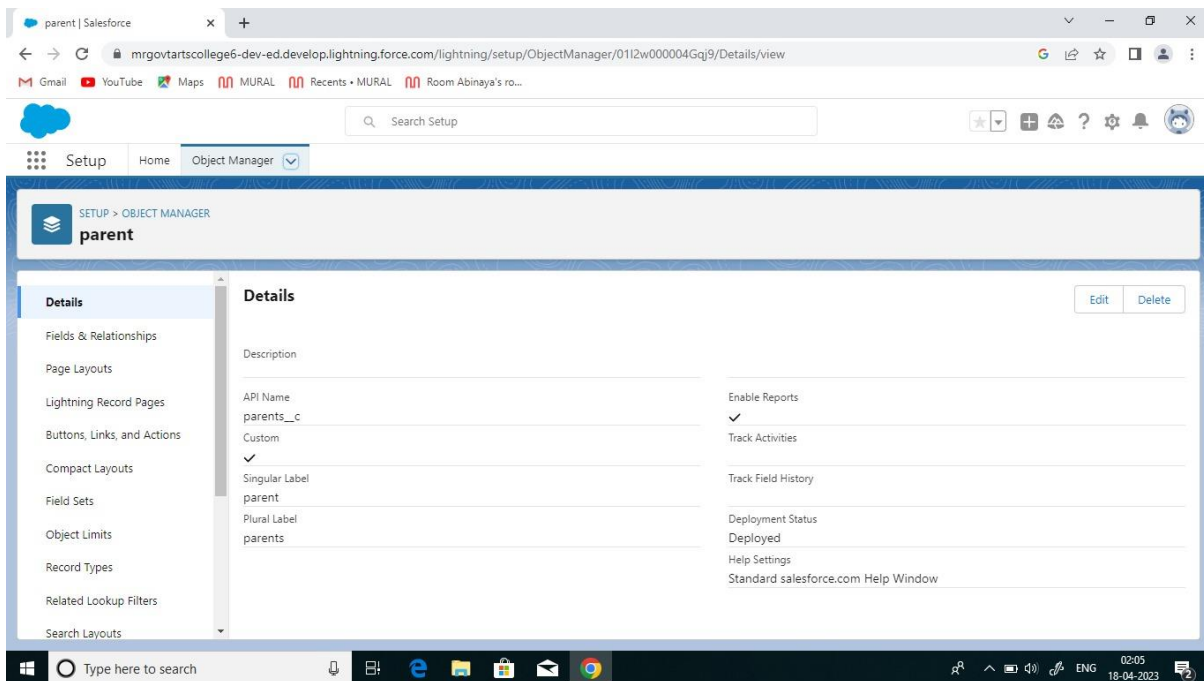
Type here to search

ENG 02:02 18-04-2023

## A CRM APPLICATION FOR SCHOOLS AND COLLEGES



## A CRM APPLICATION FOR SCHOOLS AND COLLEGE



Create of objects(school, student, parent)

### Milestone 3: Lightning App



# A CRM APPLICATION FOR SCHOOLS AND COLLEGES

The screenshot shows the Salesforce Lightning Experience App Manager interface. The browser address bar displays the URL: `mrgovtartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The page title is "App Manager | Salesforce". The left sidebar contains navigation links: Setup, Home, Object Manager, Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management).

The main content area is titled "Lightning Experience App Manager" and includes a "Clone Apps(Beta)" section. This section contains a toggle switch for "Enable App Cloning" which is currently "Enabled". Below this is a table listing 23 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility.

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		14/03/2023, 12:13 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/03/2023, 12:13 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	14/03/2023, 12:13 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	14/03/2023, 12:16 pm	Lightning	✓

The bottom of the screen shows the Windows taskbar with the search bar and various application icons. The system clock indicates the time is 02:13 on 18-04-2023.

school | Salesforce

mrgovtartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Ggiu/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

school

Details

**Fields & Relationships**

6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
9876543201	X9876543201__c	Phone		
address	address__c	Text Area(255)		
birthavan higher seconder school	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
school	school__c	Master-Detail(school)		✓

parent | Salesforce

mrgovtartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gqj9/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

parent

Details

**Fields & Relationships**

5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
anbu	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
parent address	parent_address__c	Text Area(255)		

Creation fields of(School, student, parent)

## A CRM APPLICATION FOR SCHOOLS AND COLLEGES



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Profiles | Salesforce

mrgovtartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w00000xFL%3Fsetupid%3DEnhancedProfiles

Search Setup

Setup Home Object Manager

pro

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

SETUP Profiles

Profile: school profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit Clone Delete View Users

Name	school profile
User License	Analytics Cloud Integration User
Description	
Created By	Abinaya Rajadurai, 18/04/2023, 2:50 pm
Modified By	Abinaya Rajadurai, 18/04/2023, 2:50 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Maps Data Layout	Maps Data Default	Connectivity	Connectivity Layout

### Milestone 5: profile

(Creation on school profile)

### Milestone 6: User

Users | Salesforce

mrgovtartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%3FisUserEntityOverride%3D1%26retURL%3D...

Search Setup

Setup Home Object Manager

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Publisher Layouts

Lightning App Builder

SETUP Users

Active Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: Active Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00e2w00000kdizea1.wonhmlrcusb@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	ganesh_anbu	anane	anbu ganesh@gmail.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	Rajadurai_Abinaya	ARaja	ab2604@comcast.net		✓	System Administrator
<input type="checkbox"/> Edit	raman_seethadevi	srama	seethadeviraman@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	raman_selvi	srama	selviraman@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Ravi_Malar	mravi	malar ravi@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	sankar_Ravi	ravi	qriv ravi@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	Integration	integ	integration@00e2w00000kdizea1.com		✓	Analytics Cloud Integration User

## A CRM APPLICATION FOR SCHOOLS AND COLLEGES

( creation on parent details)



## A CRM APPLICATION FOR SCHOOLS AND COLLEGES

### Milestone 7:Permission set

This screenshot shows the Salesforce Setup page for a Permission Set named 'techar permission'. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the 'Permission Set Overview' for 'techar permission', including fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there are sections for 'Apps' with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

Permission Sets | Salesforce

mrgovartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w00000AAdCI

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Set

techar permission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	techar_permission
License	Namespace Prefix	
Session Activation Required	Created By	Abinaya Rajadurai
Last Modified By		16/04/2023, 2:06 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"

This screenshot shows the Salesforce Setup page for a Permission Set named 'principal permission'. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the 'Permission Set Overview' for 'principal permission', including fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there are sections for 'Apps' with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

Permission Sets | Salesforce

mrgovartscollege6-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w00000AAdAL

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Set

principal permission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	principal_permission
License	Namespace Prefix	
Session Activation Required	Created By	Abinaya Rajadurai
Last Modified By		16/04/2023, 12:37 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"

## A CRM APPLICATION FOR SCHOOLS AND COLLEGES

Creation on the permission (teacher & principal)



## A CRM APPLICATION FOR SCHOOLS AND COLLEGES

### Milestone 8: Report

A screenshot of the Salesforce Reports interface. The browser address bar shows a URL for a Salesforce instance. The Salesforce navigation bar is visible with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, People, and More. The 'Reports' tab is active, displaying a list of 'Private Reports'. The list has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: 'New students with schools Report' and 'students with schools Report', both created by 'Abinaya Rajadurai' on 16/4/2023. A sidebar on the left shows navigation options for Reports, Folders, and Favorites. The Windows taskbar is visible at the bottom with the search bar and several application icons.

Report Name	Description	Folder	Created By	Created On	Subscribed
New students with schools Report		Private Reports	Abinaya Rajadurai	16/4/2023, 12:55 pm	
students with schools Report		Private Reports	Abinaya Rajadurai	16/4/2023, 1:06 pm	

### 4. TRIALHEAD PROFILE PUBLIC URL:

TEAM LEADER- <https://trailblazar.me/id/abinaya26>

TEAM MEMBER 1 – <https://trailblazar.me/id/sriram14>

TEAM MEMBER 2 – <https://trailblazar.me/id/amuruganantham>

TEAM MEMBER 3 – <https://trailblazar.me/id/aayyasamy2>



## 5.ADVANTAGE &DISADVANTAGE :

### Advantage :

- Falling revenues and competitive market reasons behind this.
- Educational institutions keep on balance are turning.

It's no more a secret that even educational institutions experience financial pressure in the present day economy.

### Disadvantage:

- The advantages of a business using a CRM system greatly outweigh the disadvantage
- However there are pitfalls.
- Otherwise your CRM may end up being an expensive waste of time.

## 6.APPLICATION :

- As educational institutions strive to excel in a highly competitive landscape, the need for efficient management and organization has become Paramount.

## 7.CONCLUSION :

Abstract os school management system object of school management system.

## 8.futurescope;

IN 21'th century each and every fildd is coomputerized and all works are done by using the modern technologies so it has a good future.