

GOVERNMENT ARTS COLLEGE

DHAMAPURI- 05

DEPARTMENT OF MATHEMATICS

NAAN MUDHALVAN – SMART BRIDGE PROJECT

PROJECT TITLE : A CRM APPLICATION FOR  
SCHOOLS/COLLEGES

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# INDEX

S.NO	CONTENT	PAGE NO
1	INTRODUCTION	3
2	POBLEM DEFNITION & DESIGN THINKING	5
3	RESULT	
4	TRAILHEAD PROFILE PUBLIC URL	18
5	ADVANTAGES & DISADVANTAGES	18
6	APPLICATIONS	
7	CONCLUSION	
8	FUTURE SCOPE	

# 1. INTRODUCTION

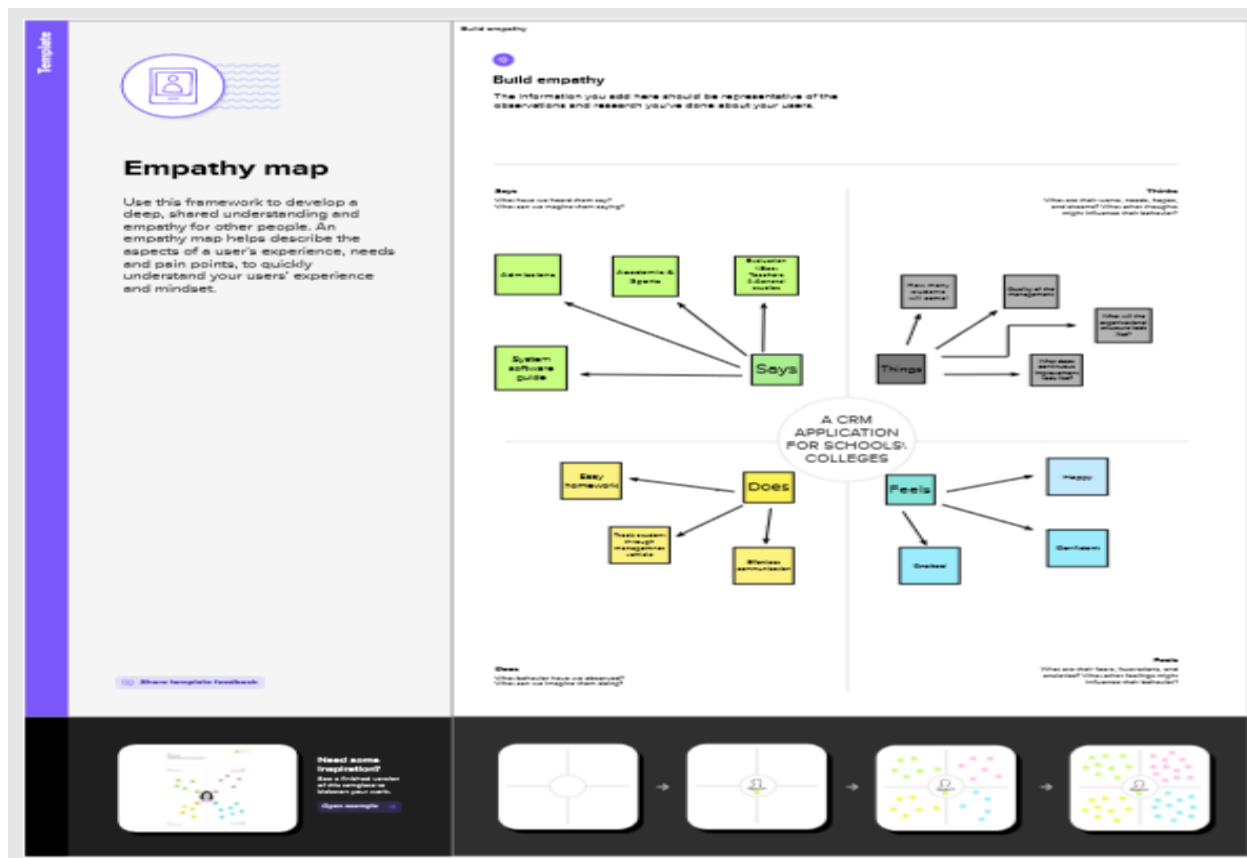
Customer Relationship Management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle.

The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

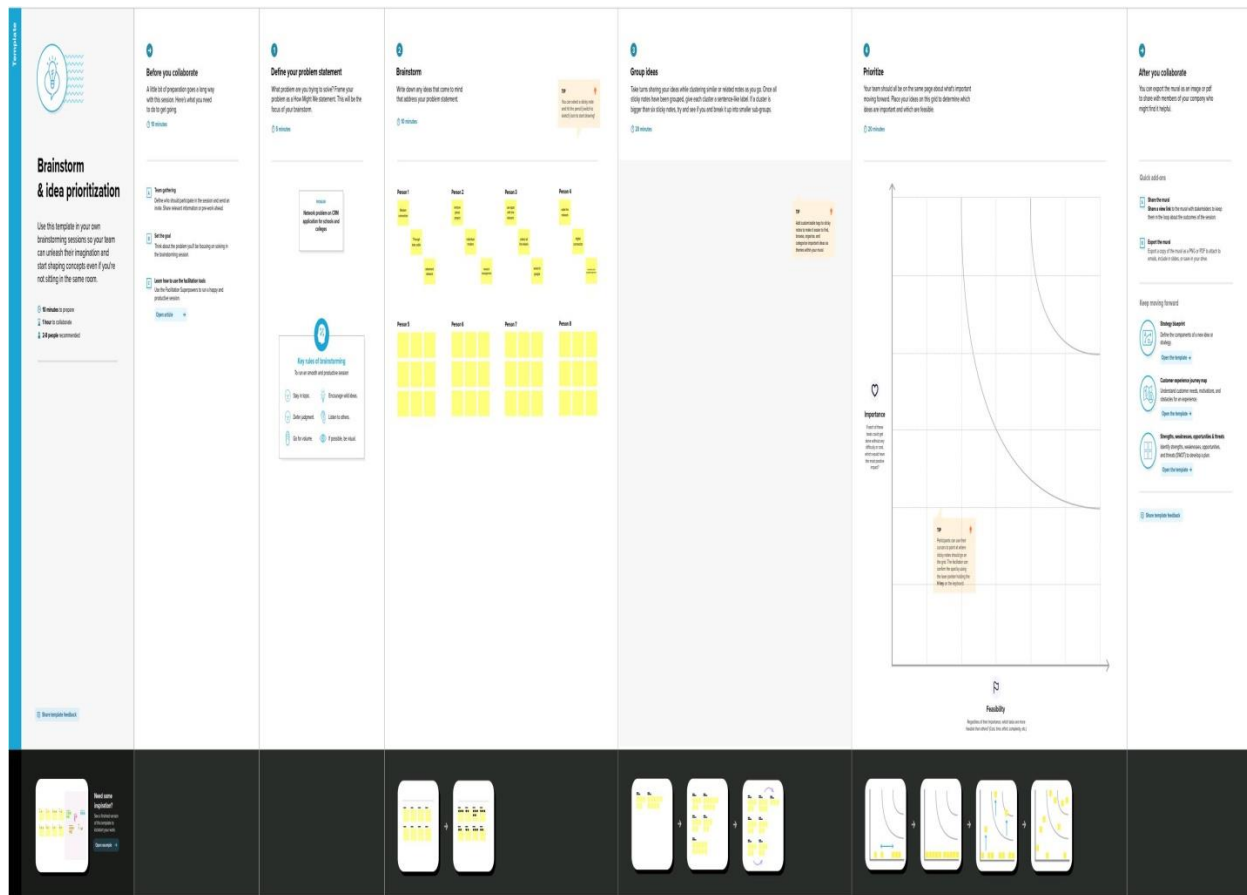
CRM systems can also give customer facing staff members detailed information on customers' personal information, purchase history, buying preferences and concerns.

## 2. POBLEM DEFNITION & DESIGN THINKING

### 2.1 Empty Map



## 2.2 Brainstorming & Idea Prioritization



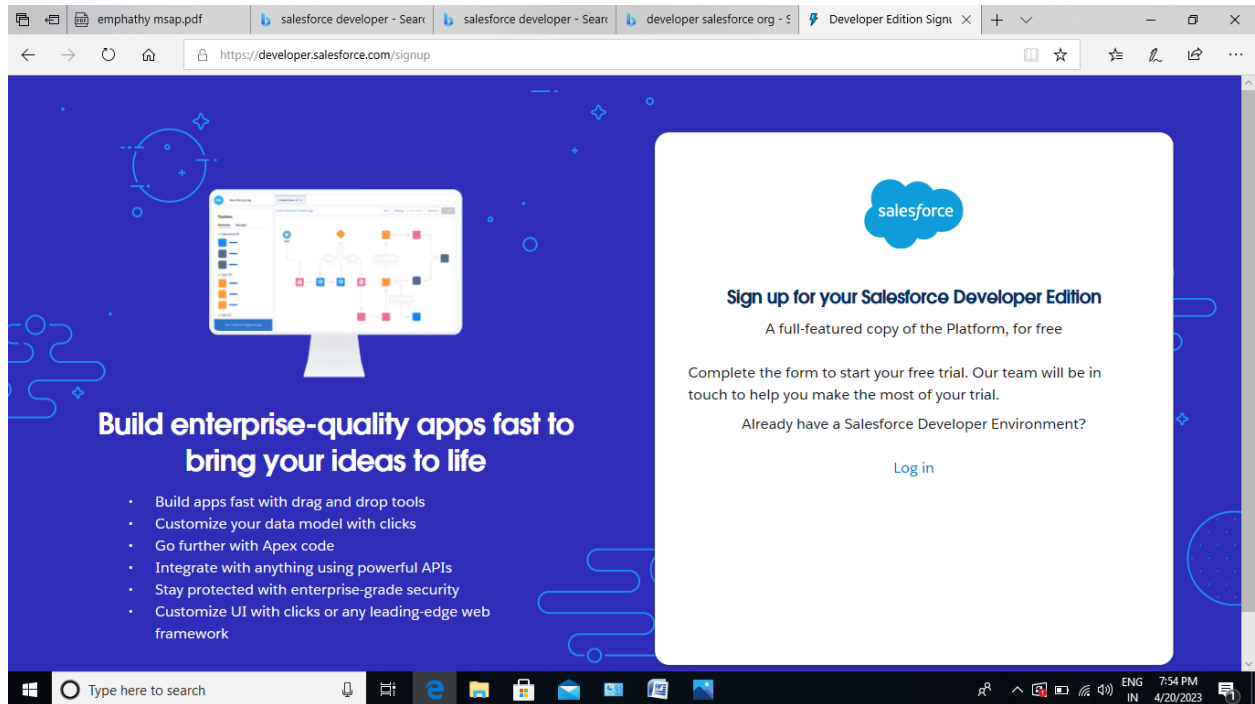
## 3. RESULT

### 3.1

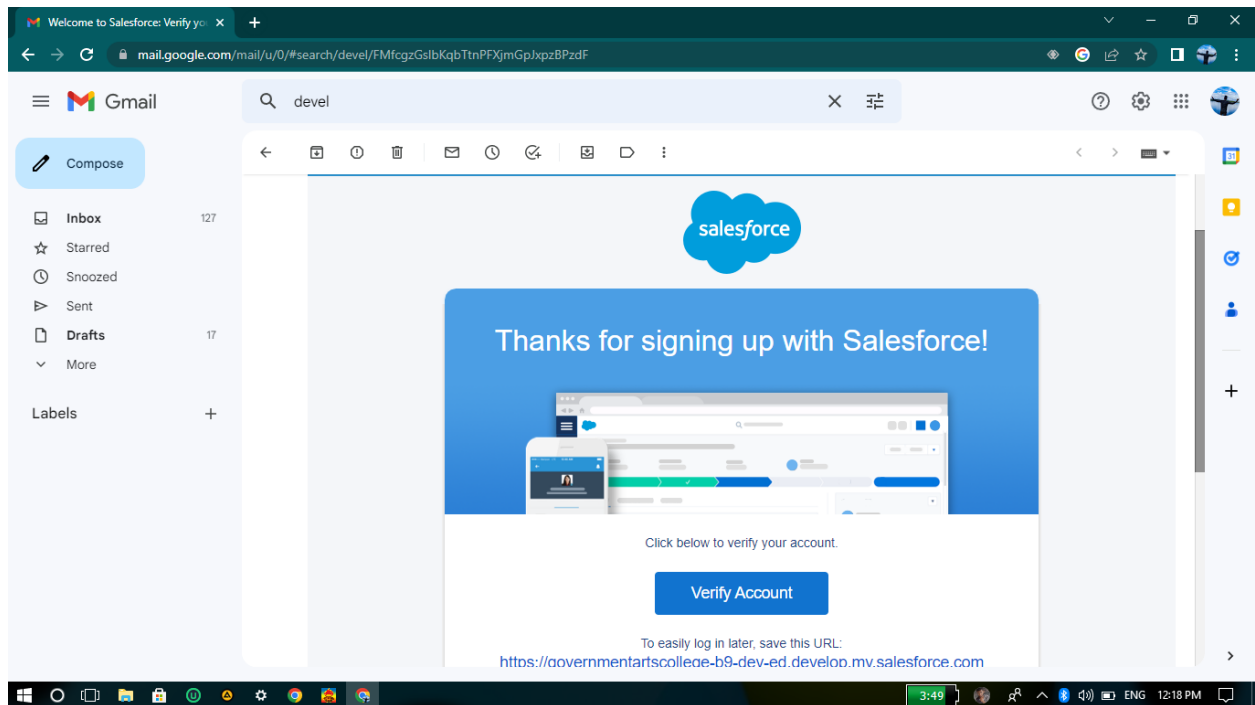
OBJECT NAME	FIELDS IN THE PROJECT	
Object 1: School	Field Label	Data type
	Address	Text area
	Phone Number	Phone
Object 2: Student	Field Label	Data type
	School	Master Detailed Relationship
	Results	Pick list
Object 3: Parents	Field Label	Data type
	Parents Address	Text Area
	Parents Number	Phone

## 3.2 Activity & Screenshot

### Milestone:1 Create Sales Org:



### Account Activation :



## Milestone-2: Object

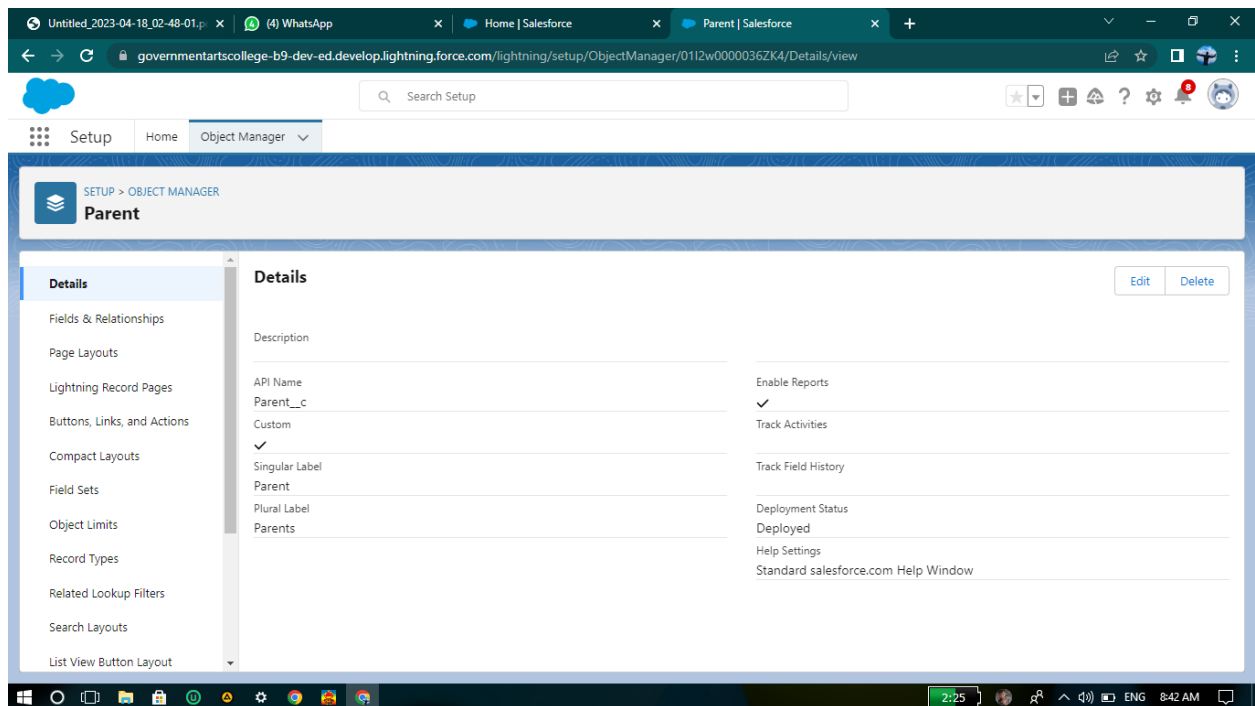
### Activity – 1 : School Object

The screenshot shows the Salesforce Object Manager interface for the 'school' object. The browser tabs include 'Untitled\_2023-04-18\_02-48-01.p...', '(4) WhatsApp', 'Home | Salesforce', and 'school | Salesforce'. The URL is 'governmentartcollege-b9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000036Z1r/Details/view'. The left sidebar shows the 'Details' section with a list of configuration options: 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 displays the 'Details' for the 'school' object, including the API Name 'school\_\_c', Custom checkbox checked, Singular Label 'school', Plural Label 'schools', Enable Reports checked, Track Activities, Track Field History, Deployment Status 'Deployed', and Help Settings 'Standard salesforce.com Help Window'. The 'Edit' and 'Delete' buttons are visible in the top right corner.

### Activity – 2 : Student Object

The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The browser tabs include 'Untitled\_2023-04-18\_02-48-01.p...', '(4) WhatsApp', 'Home | Salesforce', and 'Student | Salesforce'. The URL is 'governmentartcollege-b9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000036ZJa/Details/view'. The left sidebar shows the 'Details' section with a list of configuration options: 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 displays the 'Details' for the 'Student' object, including the API Name 'Student\_\_c', Custom checkbox checked, Singular Label 'Student', Plural Label 'Students', Enable Reports checked, Track Activities, Track Field History, Deployment Status 'Deployed', and Help Settings 'Standard salesforce.com Help Window'. The 'Edit' and 'Delete' buttons are visible in the top right corner.

## Activity – 3 : Parent Object



## Milestone – 3 : Lighting 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 :

**Lightning Experience App Manager**

**Clone Apps (Beta)**

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☒ Enabled

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
1	All Tabs	AllTabSet		18/03/2023, 9:03 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	18/03/2023, 9:03 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	18/03/2023, 9:03 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	18/03/2023, 9:06 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	18/03/2023, 9:03 am	Classic	✓

## Milestone – 4 : Fields and Relationship

### Activity – 1 :

### Fields and Relationship for School Objects.

**SETUP > OBJECT MANAGER**

**school**

**Fields & Relationships**

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
1\393,Perumal Street,Dharmapuri.	X1_393_Perumal_Street_Dharmapuri__c	Text Area(255)		
1\393,Perumal Street,Tamilnadu.	X1_393_Perumal_Street_Tamildu__c	Text Area(255)		
6380801624	X6380801624__c	Phone		
Created By	CreatedById	Lookup(User)		
District	Districts__c	Text Area(255)		
govtboysschoolkambainallur@gmail.com	govtboysschoolkambainallur_gmail_com__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓



## Activity –2 :

### Fields and Relationship for Student Objects.

The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table of 10 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: 6380801624 (Phone), 80 (Number(18, 0)), 90 (Number(18, 0)), 98 (Number(18, 0)), Class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), and Result (Picklist). The 'Indexed' column shows checkboxes for each field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
6380801624	X6380801624__c	Phone		<input type="checkbox"/>
80	X80__c	Number(18, 0)		<input type="checkbox"/>
90	X90__c	Number(18, 0)		<input type="checkbox"/>
98	X98__c	Number(18, 0)		<input type="checkbox"/>
Class	Class__c	Number(18, 0)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Result	Result__c	Picklist		<input type="checkbox"/>

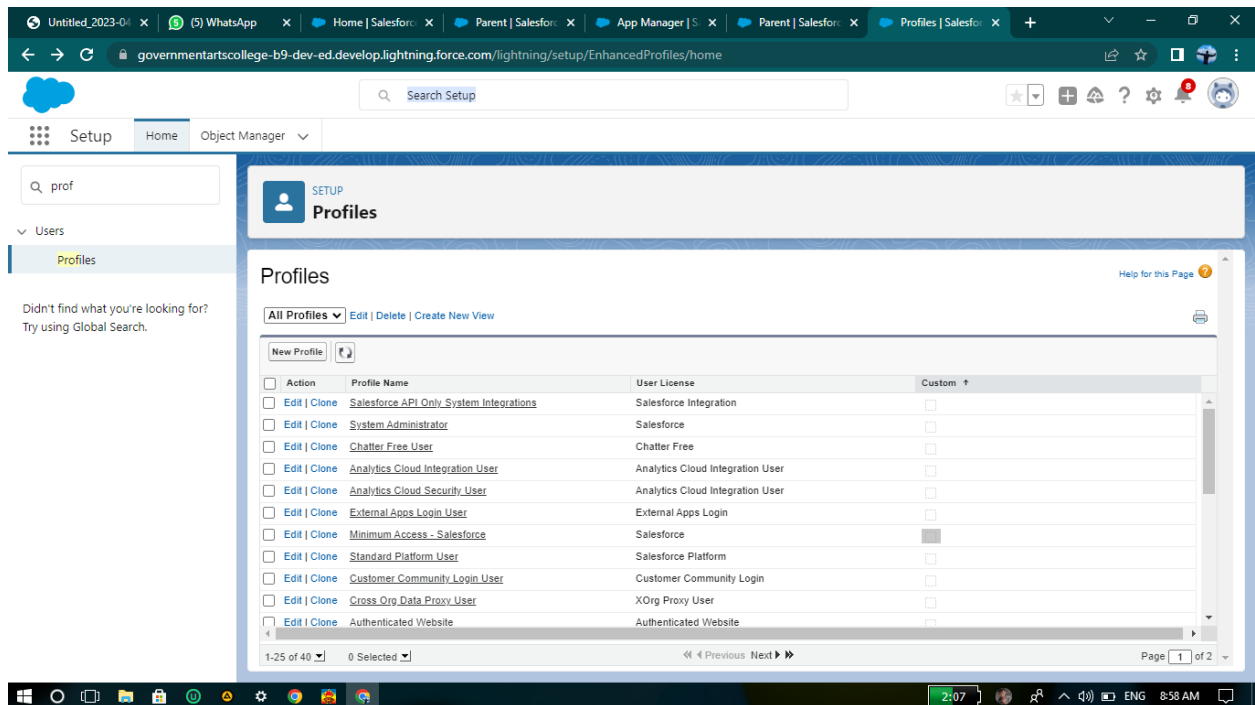
## Activity – 3 :

### Fields and Relationship for Parent Objects.

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a table of 7 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: 1\43.Ghandhi Street,Selam (Text Area(255)), 8940813740 (Phone), Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), Parent Name (Text(80)), and Tamilnadu (Text Area(255)). The 'Indexed' column shows checkboxes for each field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
1\43.Ghandhi Street,Selam	X1_43_Ghandhi_Street_Selam__c	Text Area(255)		<input type="checkbox"/>
8940813740	X8940813740__c	Phone		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Parent Name	Name	Text(80)		<input checked="" type="checkbox"/>
Tamilnadu	Tamilnadu__c	Text Area(255)		<input type="checkbox"/>

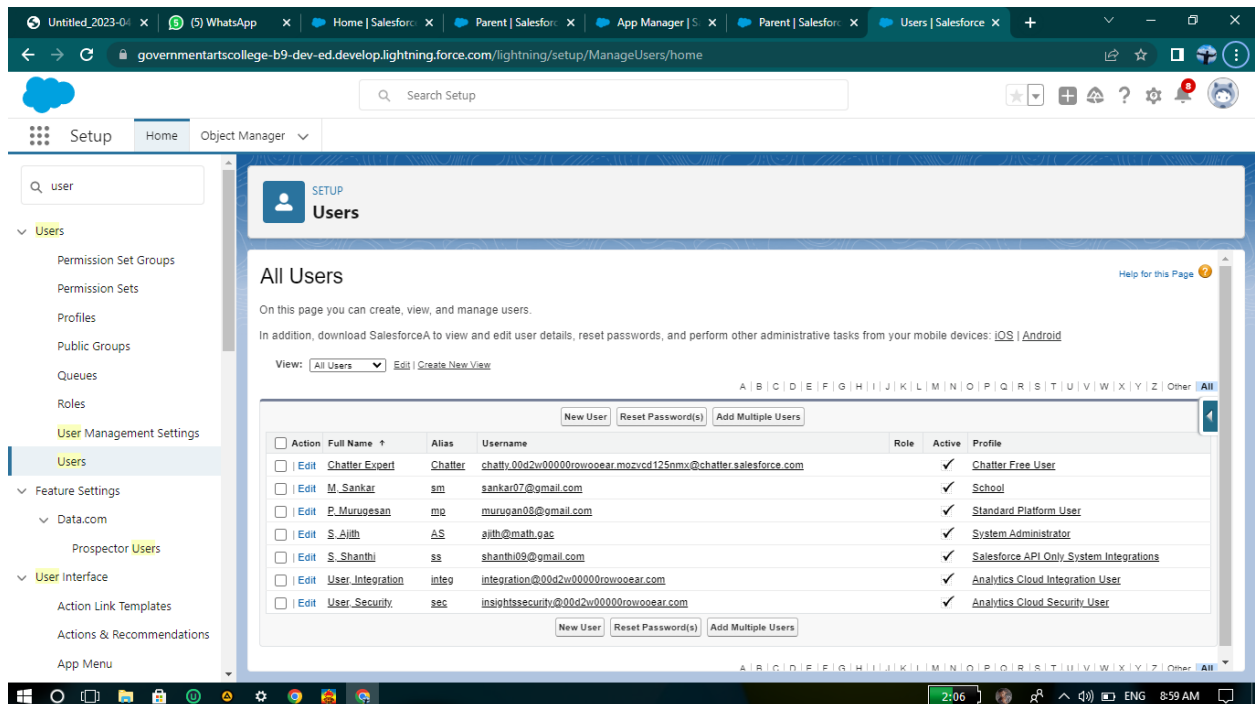
## Milestone – 5 : Profile



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'prof' and a list of navigation items: Users, Profiles, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled 'Profiles' and includes a 'New Profile' button. Below this is a table listing various profiles with columns for Action, Profile Name, User License, and Custom. The table is sorted by 'Custom' in ascending order.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	System Administrator	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	External Apps Login User	External Apps Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>

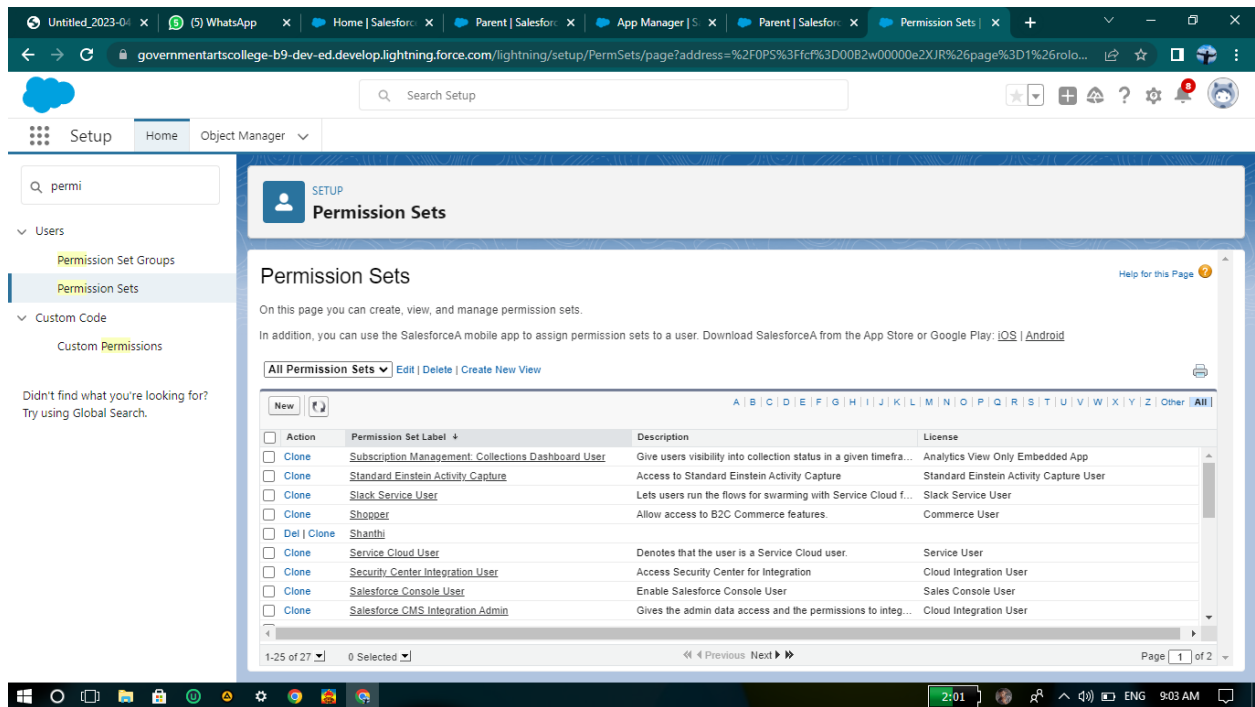
## Milestone -6 : Users



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled 'All Users' and includes a 'New User' button. Below this is a table listing various users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table is sorted by 'Full Name' in ascending order.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatter.00d2v0000rowo0ear.mozvcd125nmv@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	M. Sankar	sm	sankar07@gmail.com		<input checked="" type="checkbox"/>	School
<a href="#">Edit</a>	P. Murugesan	mq	murugan08@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	S. Aithi	AS	aithi@math.gac		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	S. Shanithi	ss	shanithi09@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<a href="#">Edit</a>	User Integration	inteo	integration@00d2v0000rowo0ear.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insivhtssecurity@00d2v0000rowo0ear.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

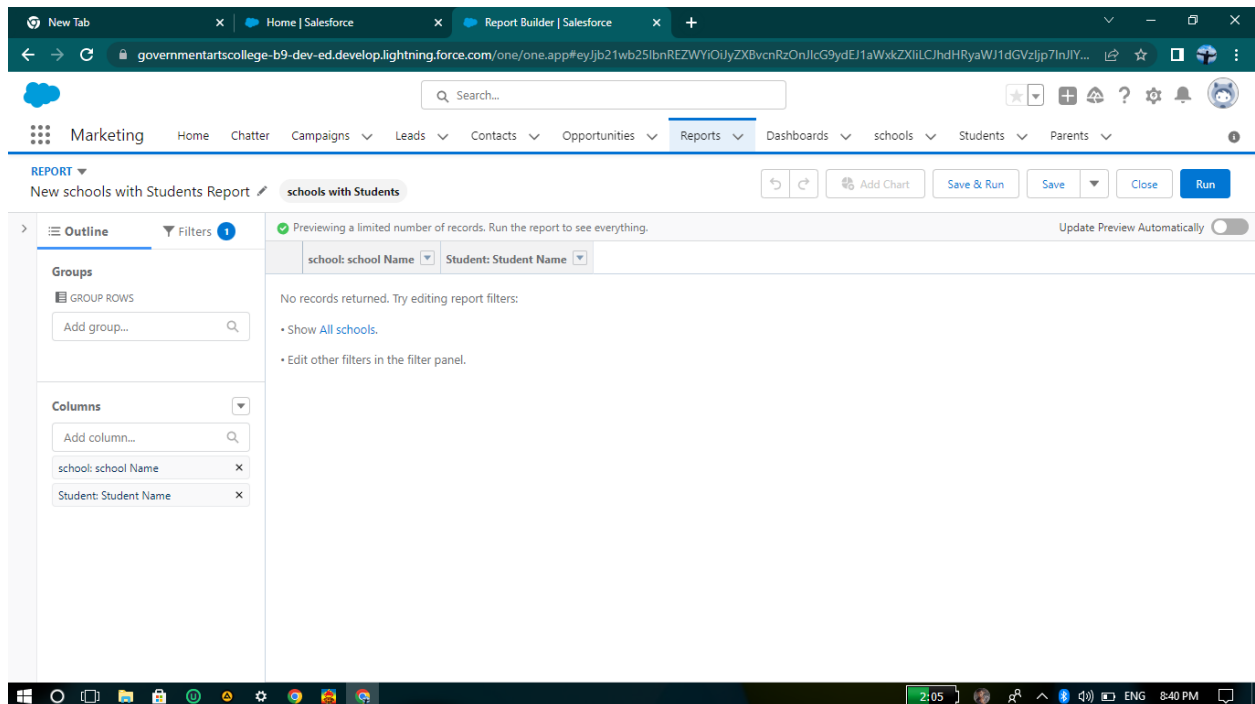
## Milestone – 7 : Permission Sets



The screenshot shows the Salesforce Setup interface for Permission Sets. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. The table lists several permission sets, including 'Subscription Management Collections Dashboard User', 'Standard Einstein Activity Capture', 'Slack Service User', 'Shopper', 'Service Cloud User', 'Security Center Integration User', 'Salesforce Console User', and 'Salesforce CMS Integration Admin'. The bottom of the screen shows the Windows taskbar with the time 9:03 AM.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Subscription Management Collections Dashboard User	Give users visibility into collection status in a given timefra...	Analytics View Only Embedded App
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/> Clone	Slack Service User	Lets users run the flows for swarming with Service Cloud f...	Slack Service User
<input type="checkbox"/> Clone	Shopper	Allow access to B2C Commerce features.	Commerce User
<input type="checkbox"/> Del   Clone	Shanthi		
<input type="checkbox"/> Clone	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
<input type="checkbox"/> Clone	Security Center Integration User	Access Security Center for Integration	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integ...	Cloud Integration User

## Milestone – 8 : Report



The screenshot shows the Salesforce Report Builder interface for the 'schools with Students Report'. The left sidebar contains navigation links for Marketing, Home, Chatter, Campaigns, Leads, Contacts, Opportunities, Reports (selected), Dashboards, schools, Students, and Parents. The main content area is titled 'REPORT' and includes a search bar, a 'New schools with Students Report' button, and a table of existing reports. The table has columns for school: school Name and Student: Student Name. The table shows 'No records returned. Try editing report filters:'. The bottom of the screen shows the Windows taskbar with the time 8:40 PM.

school: school Name	Student: Student Name
No records returned. Try editing report filters:	

#### 4. TRAILHEAD PROFILE PUBLIC URL

AJITH - <https://trailblazer.me/id/ajits50>  
KAVIYARASU - <https://trailblazer.me/id/kavim49>  
KABILAN - <https://trailblazer.me/id/kkabilank>  
TAMILAVAN - <https://trailblazer.me/id/tamilavan>

#### 5. ADVANTAGES & DISADVANTAGES

Advantages	Disadvantages
Enhances Better Customer Service	CRM may not suit all businesses
Facilitates discovery of new customers	Limited access to data
Increases customer revenues	It does'nt always keep all prospects together
Helps the sales team in closing deals faster	Inefficiently attract and retain customers
Builds up on effective internal communication	Time consumption is increased a lot

#### 6. APPLICATIONS

- Examples and Strategies
- Tracking Customers
- Collecting Data for Marketing
- Improving Interactions and Communications
- Planning your operations
- Collect and Evaluate customer data
- 

## 7. CONCLUSION

The concept Customer Relationship Management is evolving and is provide sample scope for many other developments in an industry to take place.

Over recent past, the researches and practices of CRM has led to many discoveries of concepts and theories already discussed.

The Customer Relationship Management is now become a Customer Experience Management

## 8. FUTURE SCOPE

- ✓ Customer Intelligence is King
- ✓ AI, BI and Beyond
- ✓ APIs and Integrations
- ✓ Keeping Customers Happy and Keep Them Coming Back
- ✓ CRM as a single Source of Truth
- ✓ More Deeper Automations
- ✓ Personalization is Key