

GOVERNMENT ARTS COLLEGE FOR WOMEN

SALEM- 8

DEPARTMENT OF MATHEMATICS

TEAM ID: NM2023TMID16095

TEAM LEAD: R. BHAVATHARANI

NM ID: EABDCB2FB324D69916F4A6AA76D2A3A2

TEAM MEMBER 1: G.DHANUSHYA

NM ID: F35DEB505332FEF97FD49E4FEBC2B85F

TEAM MEMBER 2: M.DHARANI

NM ID: 79C361203C81977BCF04C971C399E02F

TEAM MEMBER 3: R. DHARANI

NM ID: 89270DAC30A14E1967048E0449FDDC80

A CRM APPLICATION FOR SCHOOLS OR COLLEGES

1. INTRODUCTION

1.1 Overview

A CRM is a system that helps schools and colleges manage the entire lifecycle of a potential customer- sometimes also referred to as a lead. With a CRM, you can track and store the data that is important to your operations, all in one easy-to-access place. CRM gives harnessing a customer relationship management (CRM) tool to provide customers with best possible experience and every touch point.

1.2 Purpose

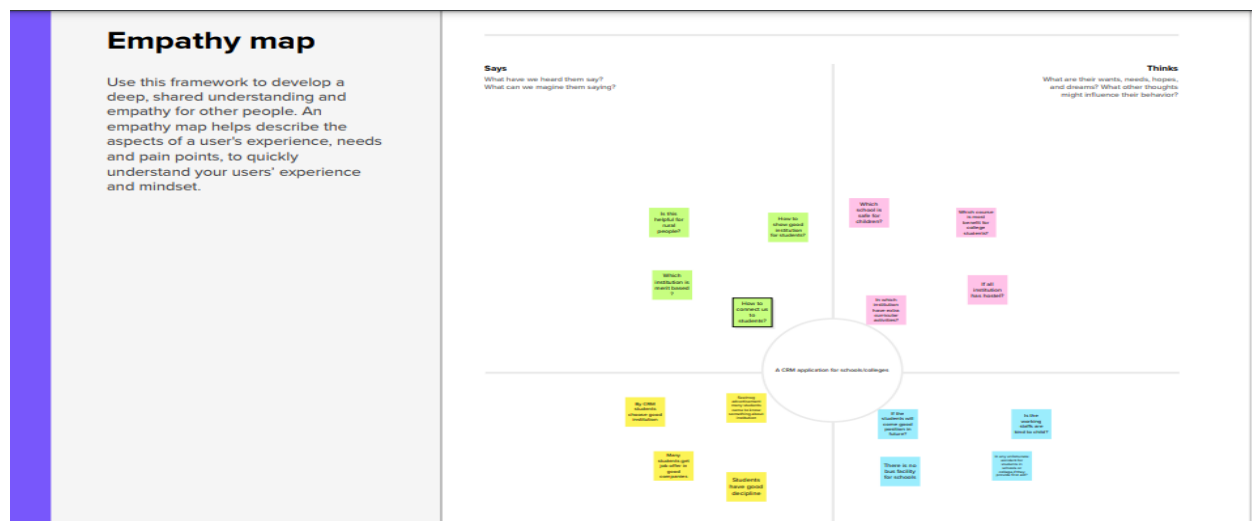
Education CRM software are meant to automate and manage communication which students, employees, donors and everyone in the institution. The main aim of this educational institution is to provide quality education and reach every student who is interested to pursue education. An education customer relationship management software manages all your institutions at interactions with prospective and current students. It also supports managing communications with alumni, employees, donors, and other members of the education sector in your institution.

1.3 Objectives

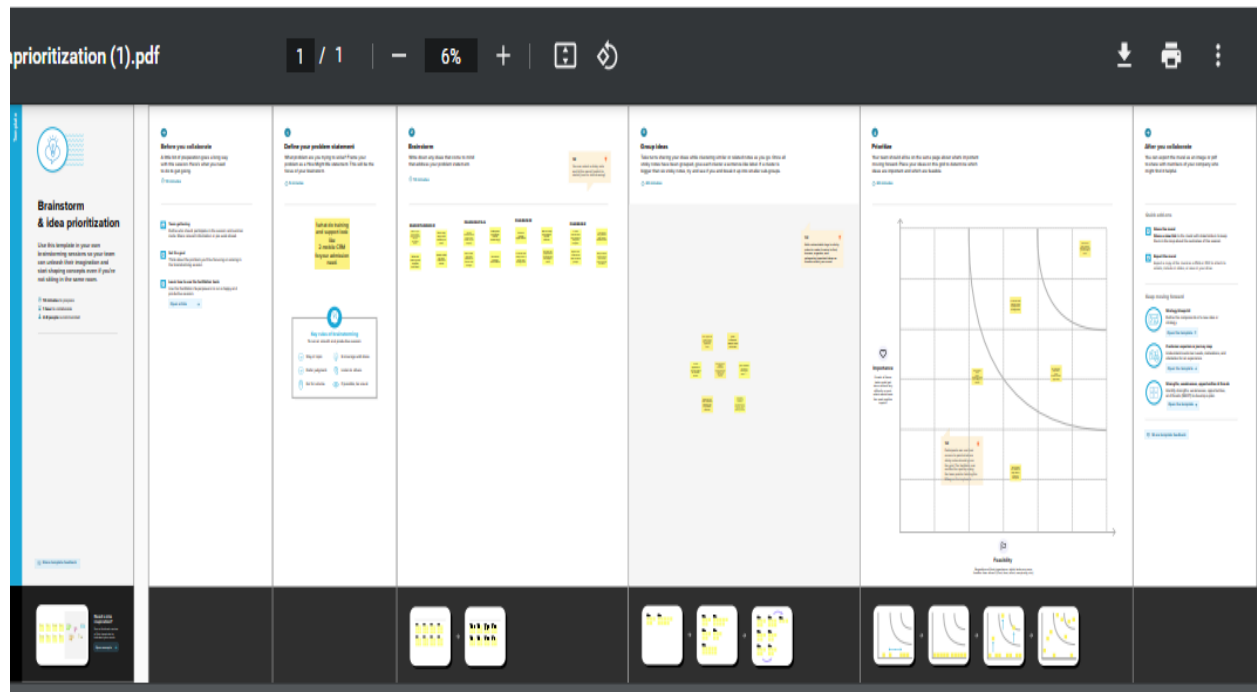
The fundamental purpose of a CRM system is to improve the customer experience. Executing on this objective is the most sure-fire way to see positive results across your business. When you make improved customer satisfaction the main goal for your CRM, all other objectives work to support this goal.

2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming map screenshot



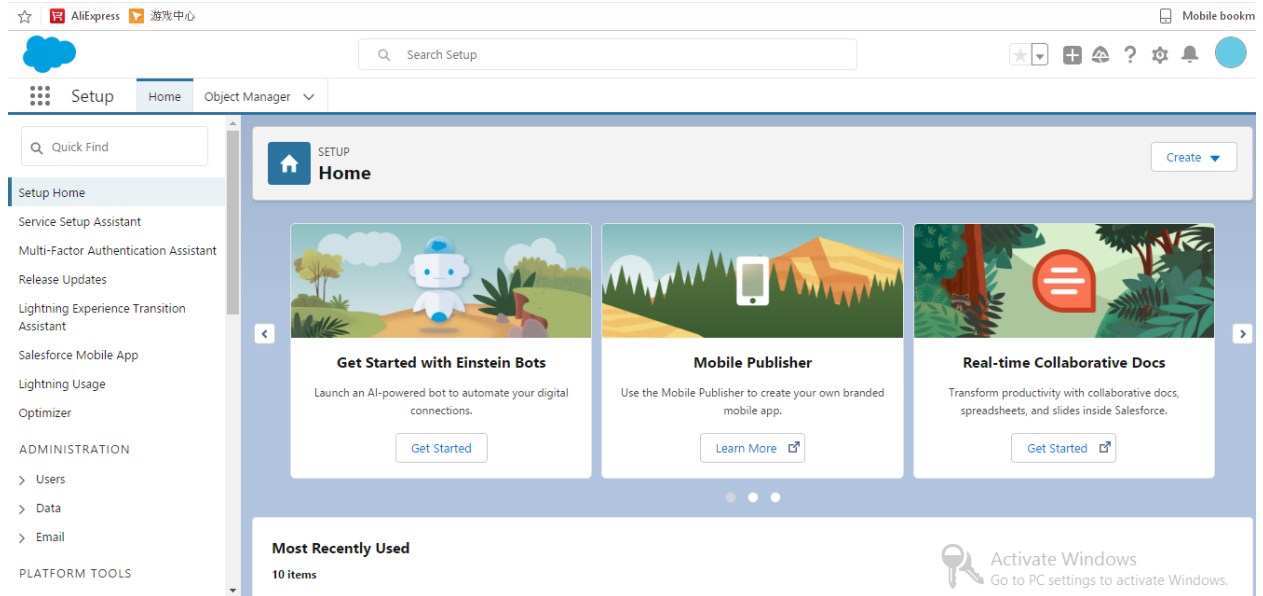
3. RESULT

3.1 Data Model:

Object name	Fields in the object	
School	Field label	Data type
	Address	Text area
	District	Text area
	Highest Marks	Roll up summary
	No of students	Roll up summary
	Phone Number	Phone
	State	Text area
	School website	Text area
Student	Field label	Data type
	Class	Number
	Marks	Number
	Phone number	Phone
	Results	pick list
	School	Master detail relationship
Parent	Field label	Data type
	Parents Address	Text area
	Parent Number	Phone

3.2 Activity & Screenshot

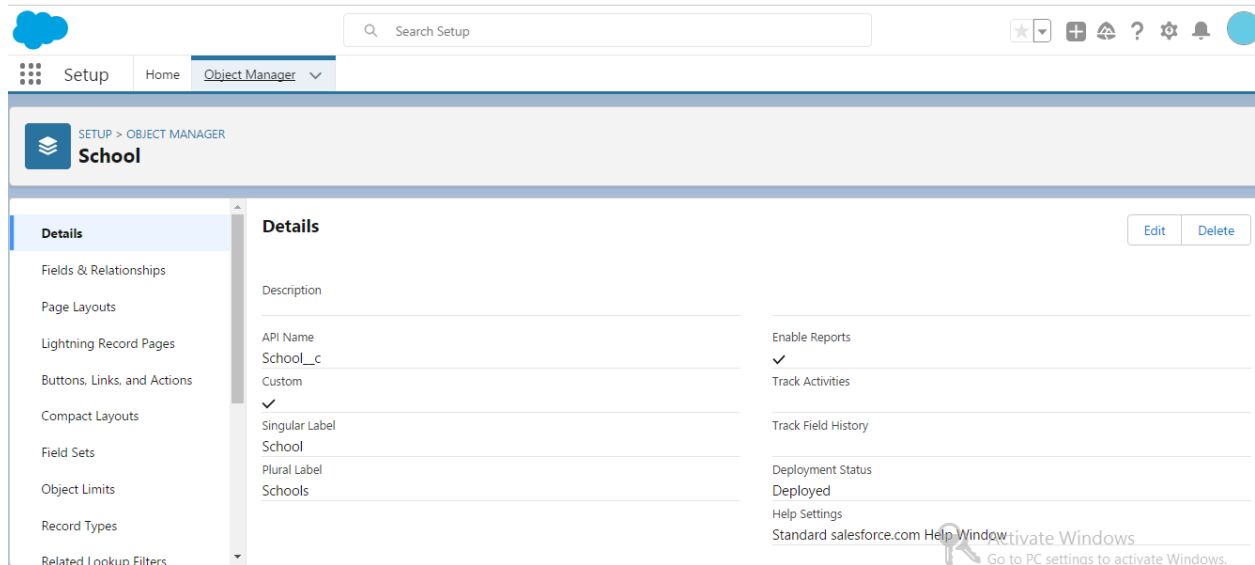
Milestone 1: Creating Developer Account



Milestone 2: Object

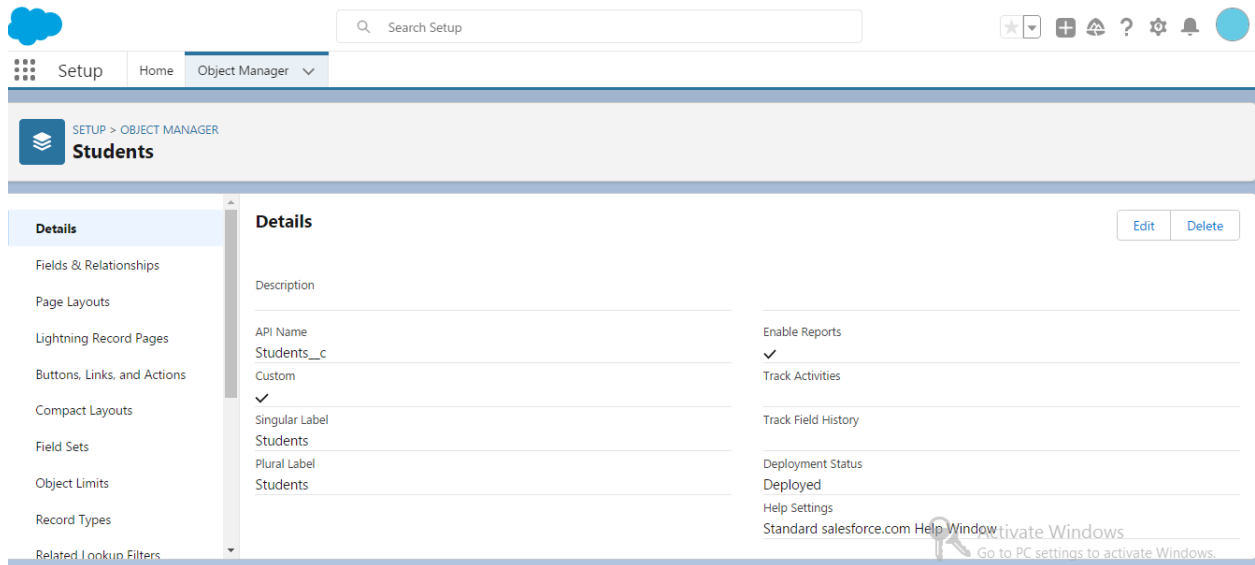
Object are database tables that permit you to store data that is specified to an organization.

Activity: 1 Creation of school object



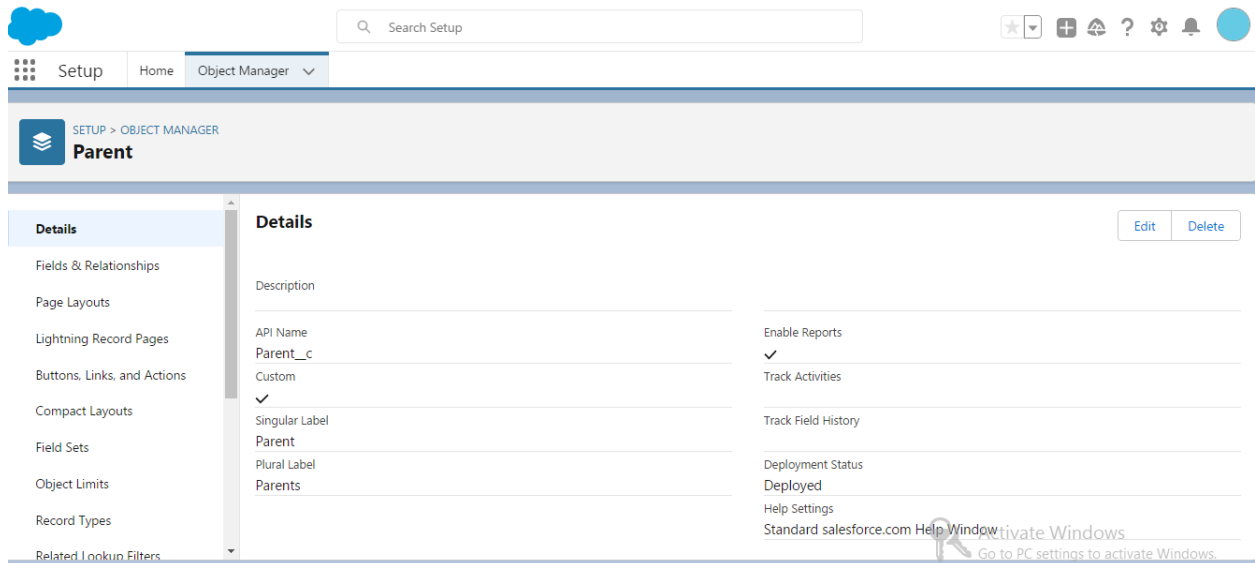
- Click gear icon- setup- object manager- custom manager
- Enter field name: School
- Plural: Schools and Clicks save.
- Enter tabs in quick find and select tabs.
- Under Custom Object Tabs, click new, for object select school.
- For tab style select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

Activity: 2 Create Student object



- Click gear icon- setup- object manager- custom manager
- Enter field name: Student
- Plural: Students
- Clicks save.
- Enter tabs in quick find and select tabs.
- Under Custom Object Tabs, click new
- For object select student.
- For tab style select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

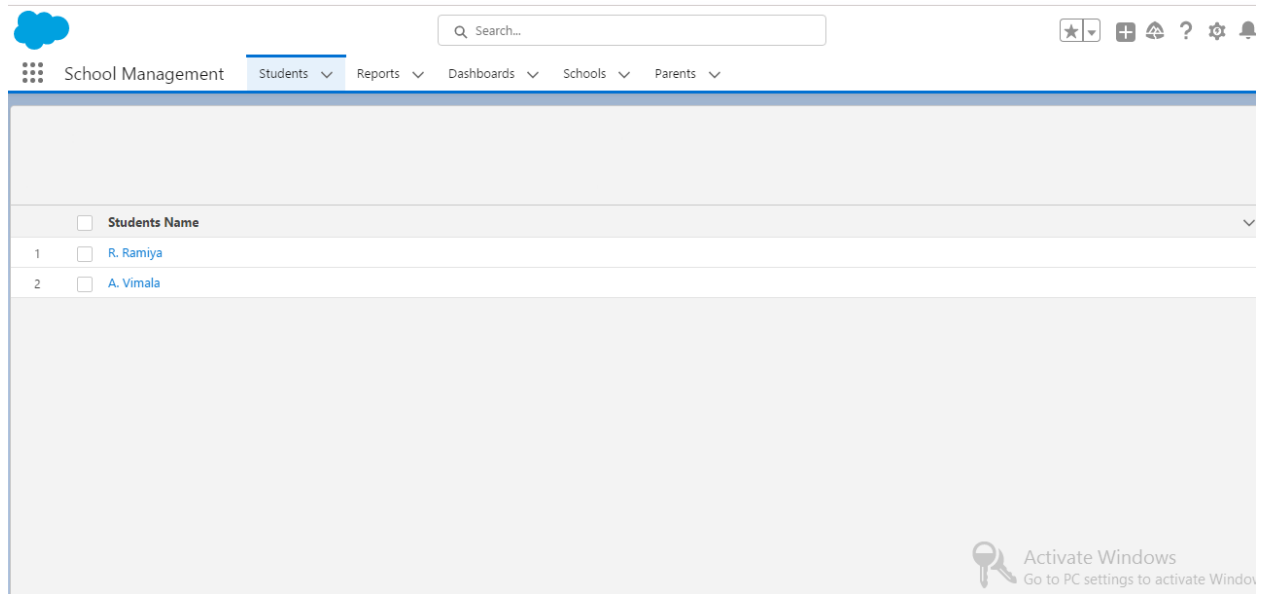
Activity: 3 Create parent object



- Click gear icon- setup- object manager- custom manager
- Enter field name: parent
- Plural: parents
- Clicks save.
- Enter tabs in quick find and select tabs.
- Under Custom Object Tabs, click new
- For object select school.
- For tab style select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

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.

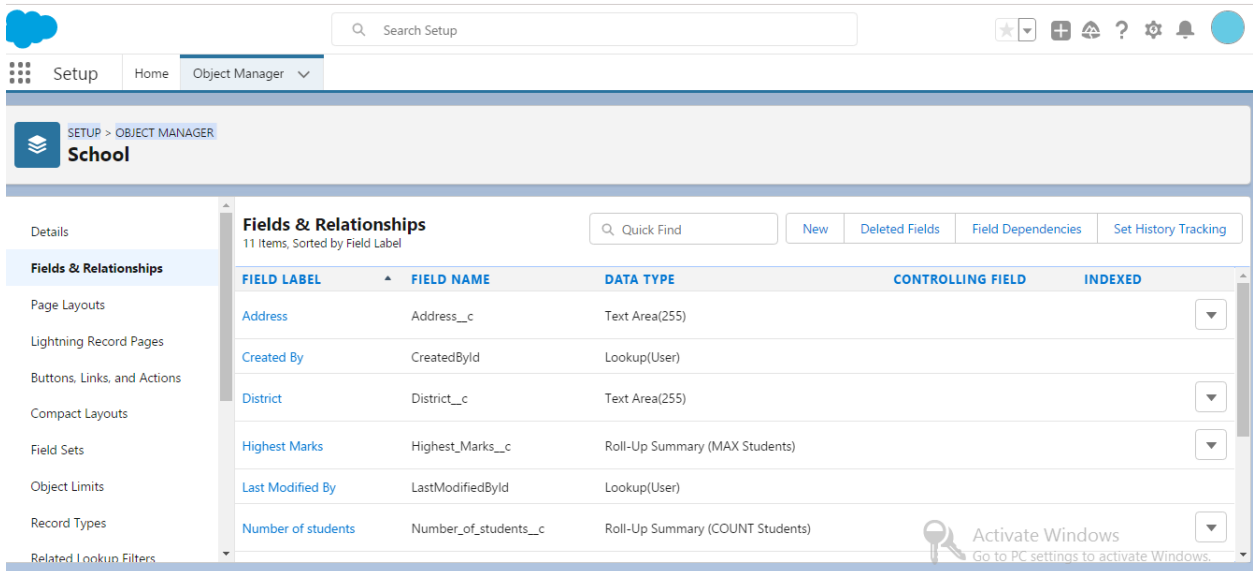


Click setup search app manager in quick find box. Click new lightning app. Enter app name as School Management. Click need object then click next and select profiles as system administrator and click save.

Milestone 4: Fields and Relationship

An object relationship in salesforce is a two way association between two objects.

Activity: 1 Creation of fields for the school objects:



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing "Home" and "Object Manager". The "Object Manager" section is selected, and the "School" object is chosen. The left sidebar lists various setup options, with "Fields & Relationships" selected. The main content area displays the "Fields & Relationships" section for the "School" object, showing 11 items sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Students)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Students)		

At the bottom right of the screen, there is a watermark that says "Activate Windows Go to PC settings to activate Windows."

Click gear icon and select setup. Click object manager and select school. On left select fields and relationships and select new. Select required data field and give label and click next, next, and click save.

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

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Last Modified By	LastModifiedById	Lookup(User)	
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Students)	
Owner	OwnerId	Lookup(User,Group)	✓
Phone Number	Phone_Number__c	Phone	
School Name	Name	Text(80)	✓
School websites	School_websites__c	Text Area(255)	
State	State__c	Text Area(255)	

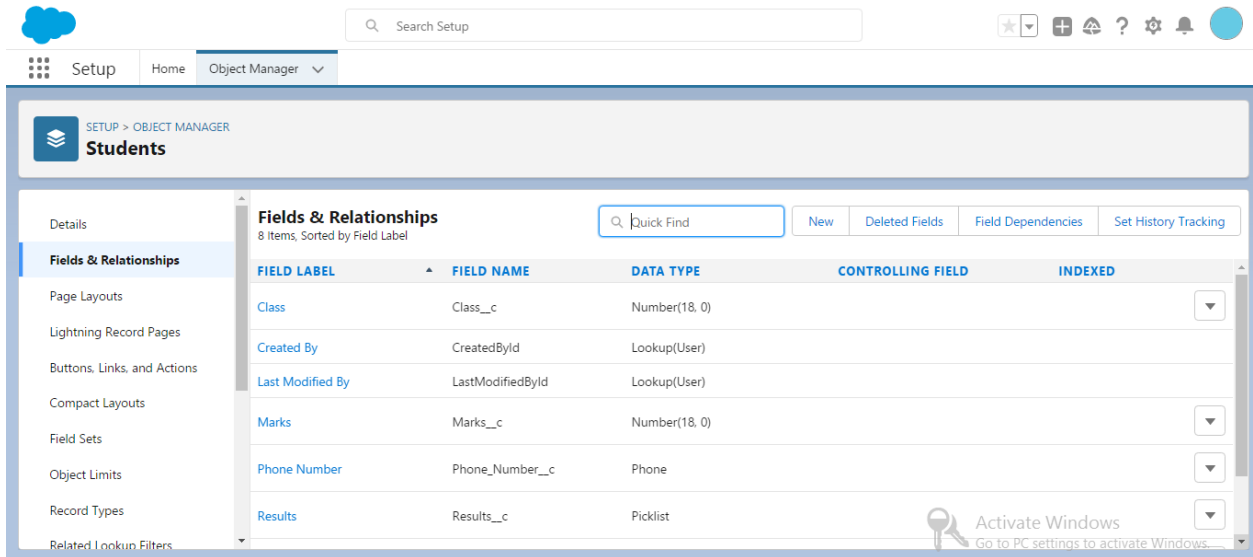
Activate Windows

Go to PC settings to activate Windows.

Create following relationships

Address, District, State, School website, Phone Number, Number of students, Highest Marks.

Activity: 2 Creation of fields for the Student objects:



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. The main navigation menu on the left includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is expanded, showing 'Students' as the selected object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' section for 'Students', showing 8 items sorted by Field Label. A table lists the fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Class, Created By, Last Modified By, Marks, Phone Number, and Results. A 'New' button is visible in the top right of the table area.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		

Click gear icon and select setup. Click object manager and select Students. On left select fields and relationships and select new. Select required data field and give label and click next, next, and click save.

Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Students

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Marks	Marks__c	Number(18, 0)	
Phone Number	Phone_Number__c	Phone	
Results	Results__c	Picklist	
School	School__c	Master-Detail(School)	✓
Students Name	Name	Text(80)	

Related Lookup Filters

Activate Windows
Go to PC settings to activate Windows.

Create the following fields and relationships

Phone number, School, Results, Class and Marks

Activity: 3 Creation of fields for parent objects:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' section for the 'Parent' object, showing a table of 6 items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are 'Created By', 'Last Modified By', 'Owner', 'Parent Address', 'Parent Name', and 'Parent Number'. The 'Parent Address' and 'Parent Name' fields are highlighted in blue. A 'New' button is visible in the top right of the table area.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	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		

Click gear icon and select setup. Click object manager and select Parent. On left select fields and relationships and select new. Select required data field and give label and click next, next, and click save.

Create the following fields and relationships

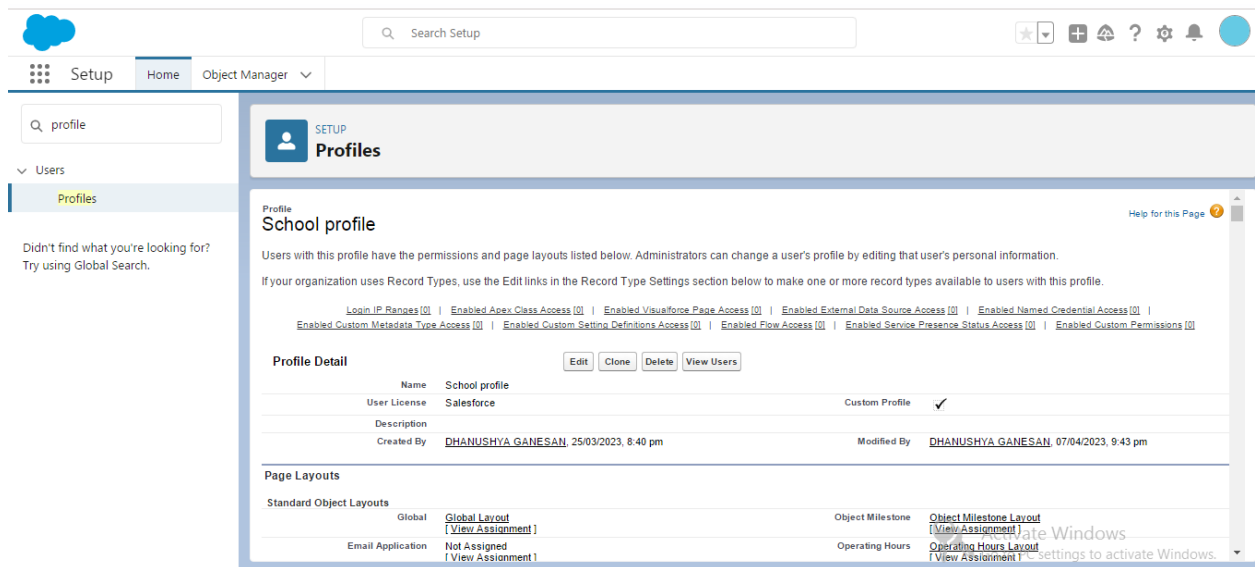
Parent Address and Parent Number.

Milestone: 5 Profiles

A Profile is a group or collection of settings and permissions that define what a user can do in salesforce.

Activity: Creation on profile

From setup enter Profile in the Quick find box, and select Profiles. In the list of profiles select Standard user and click clone and enter profile name School Profile and save.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' entered and a list of navigation items including 'Users' and 'Profiles'. The main content area is titled 'SETUP Profiles' and shows the 'School profile' details. The profile is a 'Custom Profile' with a 'Salesforce' user license. It lists various permissions that are 'Enabled', such as 'Login IP Ranges', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Named Credential Access', 'Custom Metadata Type Access', 'Custom Setting Definitions Access', 'Flow Access', 'Service Presence Status Access', and 'Custom Permissions'. Below the permissions, the 'Profile Detail' section shows the name 'School profile', user license 'Salesforce', and creation/modification details by 'DHANUSHYA GANESAN'. The 'Page Layouts' section shows assignments for 'Global' (Global Layout), 'Object Milestone' (Object Milestone Layout), and 'Operating Hours' (Operating Hours Layout).

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 Visualforce Page 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	Custom Profile	✓
User License	Salesforce		
Description			
Created By	DHANUSHYA GANESAN, 25/03/2023, 8:40 pm	Modified By	DHANUSHYA GANESAN, 07/04/2023, 9:43 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]

Still in the profile page then click edit and scroll down to custom object permission and give view all access permissions and assign to the parent profile.



Search Setup



Setup Home Object Manager

profile

Users

Profiles

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

SETUP Profiles

Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

Custom Object Permissions

	Basic Access			Data Administration				Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Master detail relationships	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After	2 hours of inactivity	Session Security Level Required at Login	
-------------------------	-----------------------	--	--

Password Policies

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/>

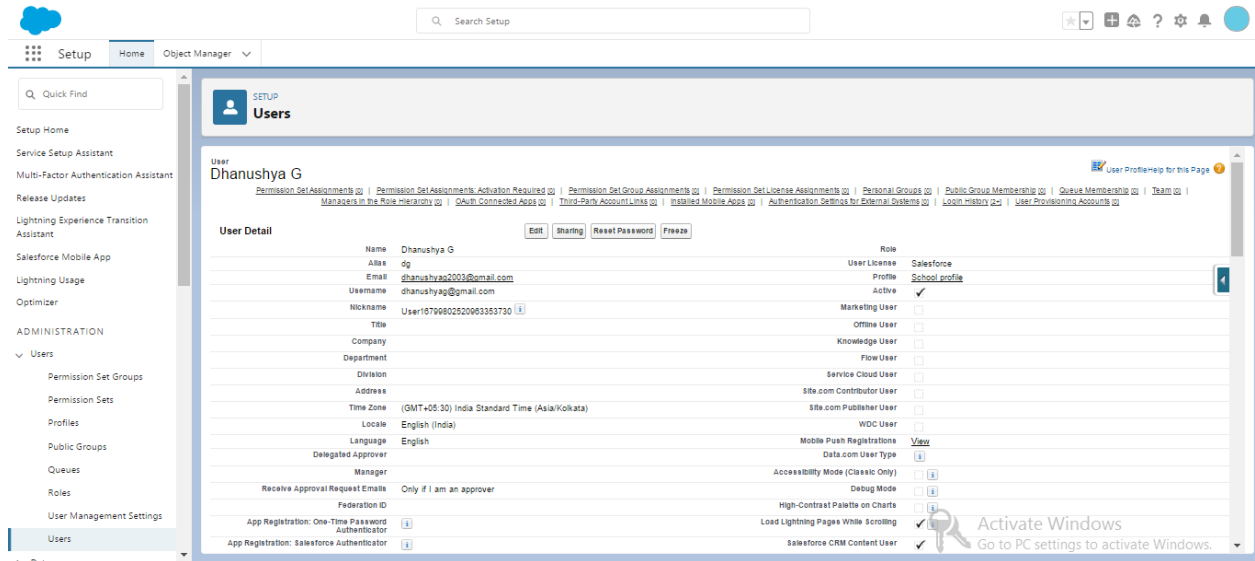
Edit Clone Delete View Users

Activate Windows

Milestone: 6 Users

A user is anyone who logs in to Salesforce. Every user in Salesforce has a user account.

Activity: Creating a User:



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links such as Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the 'Users' link is selected. The main content area is titled 'Users' and shows the 'User Detail' for a new user named 'Dhanushya G'. The user's email is 'dhanushyag2003@gmail.com', username is 'dhanushyag@gmail.com', and nickname is 'User1070980252096353730'. The user is active and has the 'Salesforce' license and 'School profile'. The 'Role' section lists various roles with checkboxes, including Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Salesforce CRM Content User. The 'App Registration' section shows 'One-Time Password Authenticator' and 'Salesforce Authenticator' as registered apps. The bottom right corner features an 'Activate Windows' watermark.

User Detail	
Name	Dhanushya G
Alias	dg
Email	dhanushyag2003@gmail.com
Username	dhanushyag@gmail.com
Nickname	User1070980252096353730
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	
App Registration: Salesforce Authenticator	
Role	Salesforce
User License	Salesforce
Profile	School profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	<input type="checkbox"/>
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Salesforce CRM Content User	<input checked="" type="checkbox"/>

From setup, in the Quick Find box, enter Users and then select Users. Click new user. Enter the user name as parents name and enter mailid and enter unique user name. Select user license as Salesforce and profile as school profile then click save.



Search Setup



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
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings

Users

Security Key (U2F or WebAuthn)	Receive Salesforce CRM Content Email Alerts
Lightning Login	Receive Salesforce CRM Content Alerts as Daily Digest
Temporary Verification Code (Expires in 1 to 24 Hours)	Make Setup My Default Landing Page
	Allow Forecasting
	Call Center
	Phone
	Extension
	Fax
	Mobile
	Email Encoding Unicode (UTF-8)
	Employee Number
	Used Data Space 0 B
	Used File Space 0 B
	Last Login 28/03/2023, 11:03 am
	Last Password Change or Reset 28/03/2023, 11:04 am
	Failed Login Attempts 1
	Individual
Created By DHANUSHYA GANESAN, 28/03/2023, 10:42 am	Modified By DHANUSHYA GANESAN, 07/04/2023, 5:07 pm

Permission Set Assignments	Edit Assignments	Permission Set Assignments Help
No records to display		
Permission Set Assignments: Activation Required	Edit Assignments	Permission Set Assignments: Activation Required Help

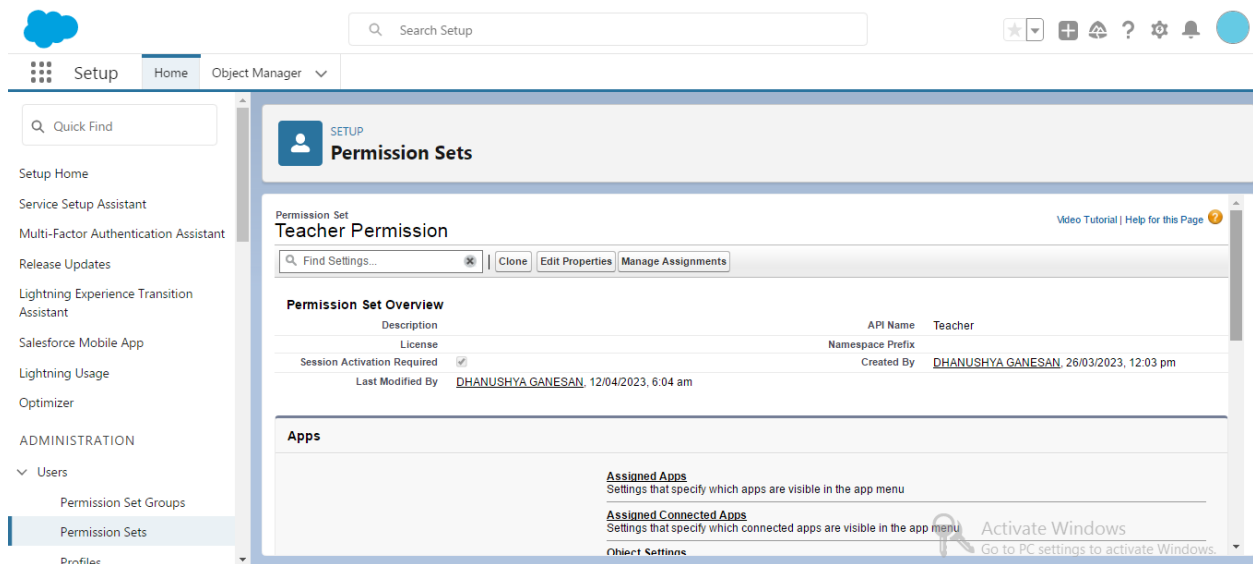
Activate Windows
Go to PC settings to activate windows.

Milestone: 7 Permission sets

A permission set is a collection of settings and permissions that gives that users access to various tools and functions.

Activity: 1 Permission sets: 1

From setup enter Permission Sets in Quick find box, then select Permission sets and click new. Give the name of the Permission set as teacher permission and assign them to teacher user and click save.



Activity: 2 Permission sets: 2

From setup enter Permission Sets in Quick find box, then select Permission sets and click new. Give the name of the Permission set as Principal permission and assign them to principal user and click save.



Search Setup



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
 - Permission Set Groups
 - Permission Sets**
 - Profiles
 - Public Groups

Permission Sets

Principal permission

[Video Tutorial](#) | [Help for this Page](#)

Find Settings...



Clone

Edit Properties

Manage Assignments

Permission Set Overview

Description	API Name	Principal_permission
License	Namespace Prefix	
Session Activation Required	Created By	DHANUSHYA GANESAN 26/03/2023, 12:12 pm
Last Modified By		DHANUSHYA GANESAN 12/04/2023, 6:05 am

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

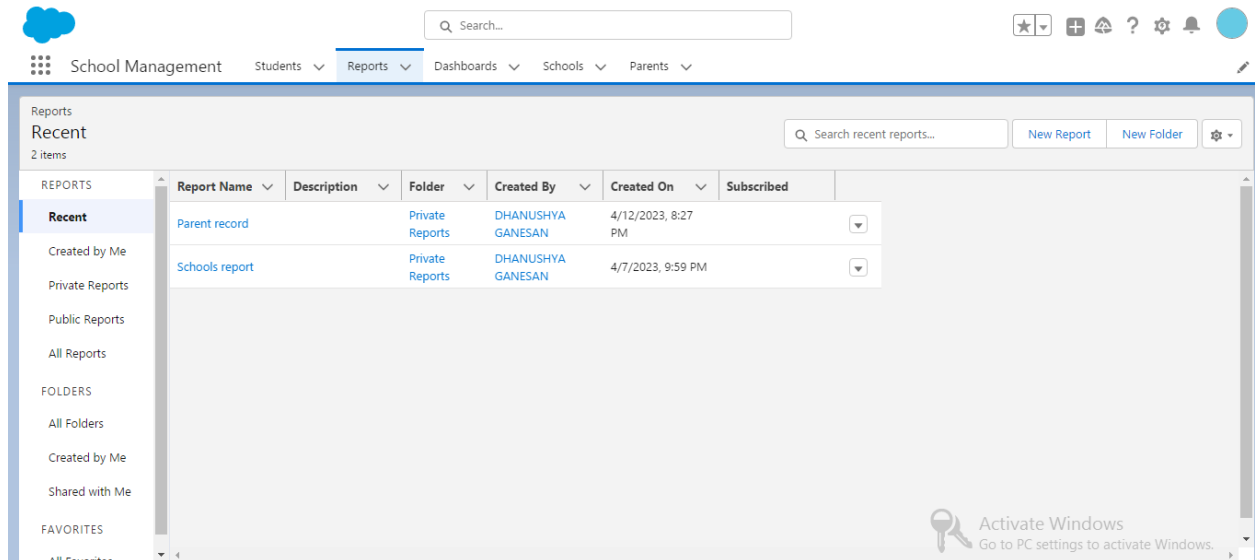


Activate Windows

Go to PC settings to activate Windows.

Milestone: 8 Reports

A report is a list of records that meet the criteria you define. Even report is stored in a folder.



From the Reports tab, click new report and select the report type as School with students and parents for the report, and click create. Customize your report, then save or run it.

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead: R. Bhavatharani: <https://trailblazer.me/id/bhavr27>

Members

G. Dhanushya: <https://trailblazer.me/id/dhang29>

M. Dharani: <https://trailblazer.me/id/dmathayan>

R. Dharani: <https://trailblazer.me/id/dranganathan7>

5. ADVANTAGES AND DISADVANTAGE

❖ Advantage:

- Reduction in the cost of expenses
- Improving the quality of service or product
- Improving the organization management process
- Increased customer loyalty
- Track and increase the number of potential clients
- History of work with each student
- Elimination of errors in Processes

❖ Disadvantage

Not everyone likes change, especially when it comes to their workflow, so by introducing a CRM to your company is processes, not everyone will be able to swiftly adapt to the new changes.

6. APPLICATION

Application areas are deployment-oriented categories that focus on commonly deployed ITS services or systems. Application areas provide a starting point for identifying the ITS standards and other resources (e.g., case studies, lessons learned) that may be relevant to a specific type of deployment.

7. CONCLUSION

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

8. FUTURE SCOPE

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.