



GOVERNMENT OF TAMILNADU

Naan Muthalvan - Project-Based Experiential Learning

A CRM APPLICATION FOR SCHOOLS/ COLLEGES

Submitted by

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Under the guidance of

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M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

(Affiliated To Mother Teresa Women's University, Kodaikanal)

Reaccredited with "A" Grade by NAAC

DINDIGUL- 62400

APRIL 2023

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PG & RESEARCH DEPARTMENT OF MATHEMATICS

BONAFIDE CERTIFICATE

This is to certify that this is a bonafide record of the project entitled, **A CRM APPLICATIONS FOR SCHOOLS/COLLEGES** done by **Ms.B.ISWARYA (20321ER009)**, **Ms.C.KALAISELVI (20321ER010)**, **Ms.K.KALAISELVI (20321ER011)** and **Ms.G.KALPANA (20321ER012)**. This is submitted in partial fulfillment for the award of the degree of **Bachelor of Science in Mathematics** in **M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN, DINDIGUL** during the period of December 2022 to April 2023.

Sri...ji:

Project Mentor(s)

Head of the Department

Submitted for viva-voce Examination held on 12.04.2023

A CRM APPLICATION FOR SCHOOLS/COLLEGES

1 INTRODUCTION

1.1 Overview

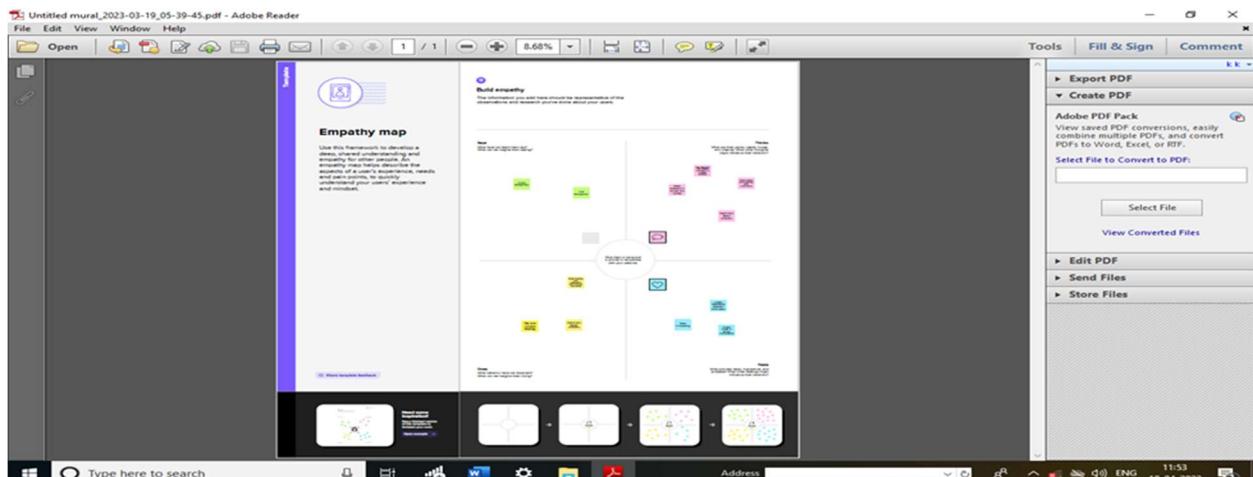
The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to salesforce. With the help of this project they will gain knowledge and can include it to their resume as well. Customer Relationship Management (CRM) systems are similar to Enterprise Resource Planning (ERP) applications, though they focus more on the customer and communication side of operation. CRM keeps track of every activity of the students on their websites.

1.2 Purpose

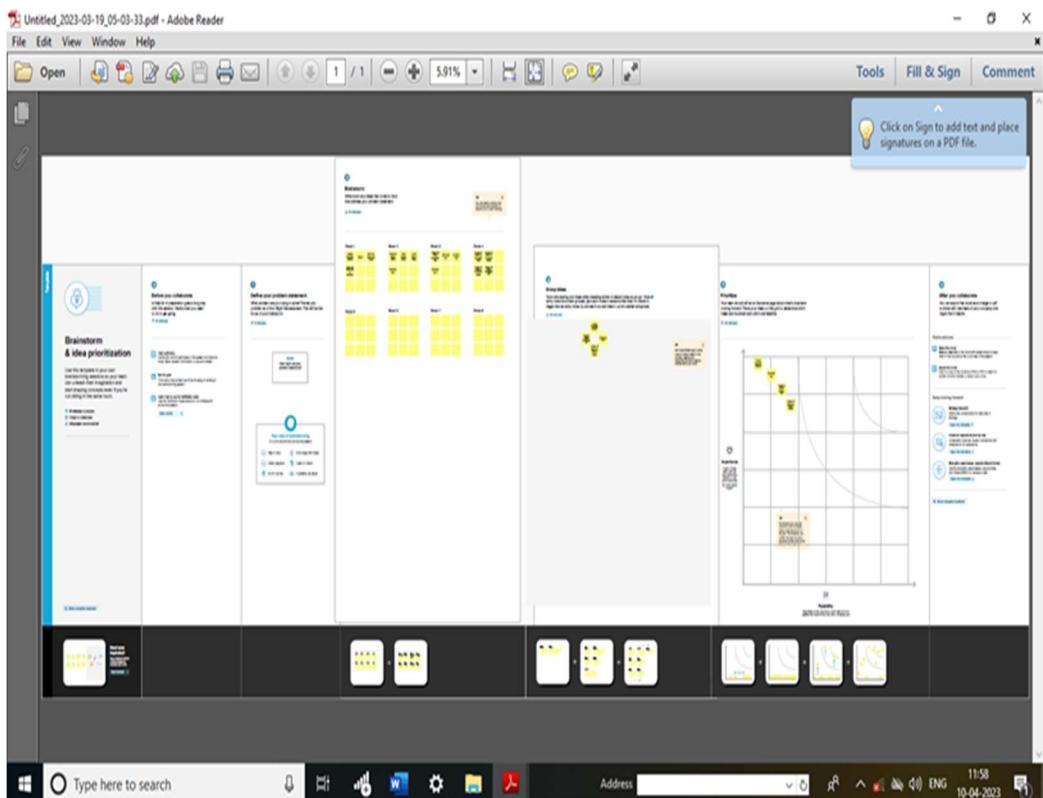
CRM systems provide real-time numbers, data and graphs that may be useful in decision making. Higher education CRM normally serves three key audiences: prospective students, current students and alumni/donors. Using a CRM system has been definitely a great improvement for our recruitment and admissions process and a great help to our team.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object Name	Fields in the Object	
School	Field label	Data type
	Adress	Text Area
	Phone Number	Phone
	Number Of Students	Rollup Summery
	Highest Marks	Rollup Summery

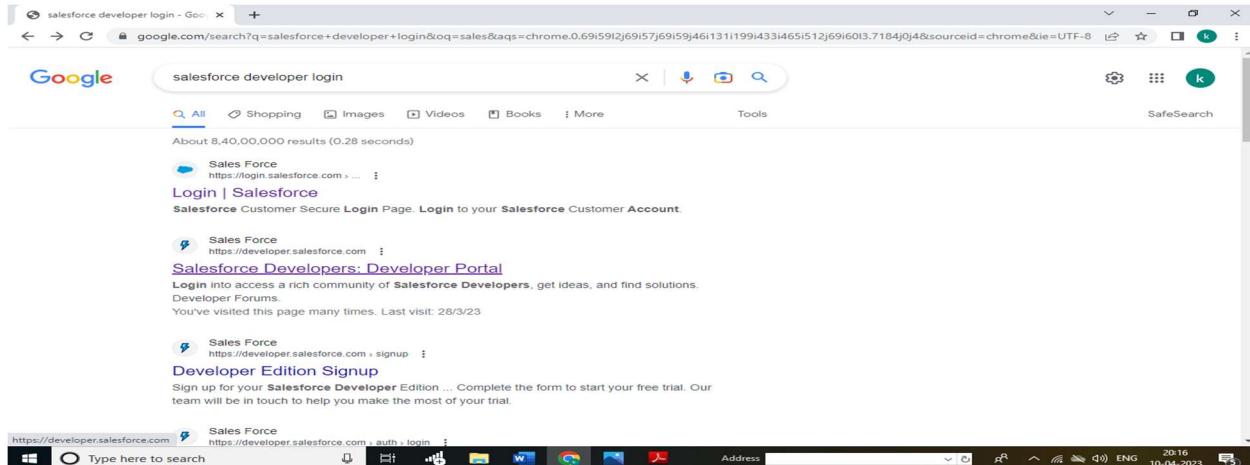
Student	Field label	Data type
	Phone Number	Phone
	School	Master-detail relationship
	Results	Picklist
	Class	Number
	Marks	Number
Parent	Field label	Data type
	Parent Adress	Text AreaP
	Parent Number	Phone

3.2 Activity & Screenshot

Creating Developer Account

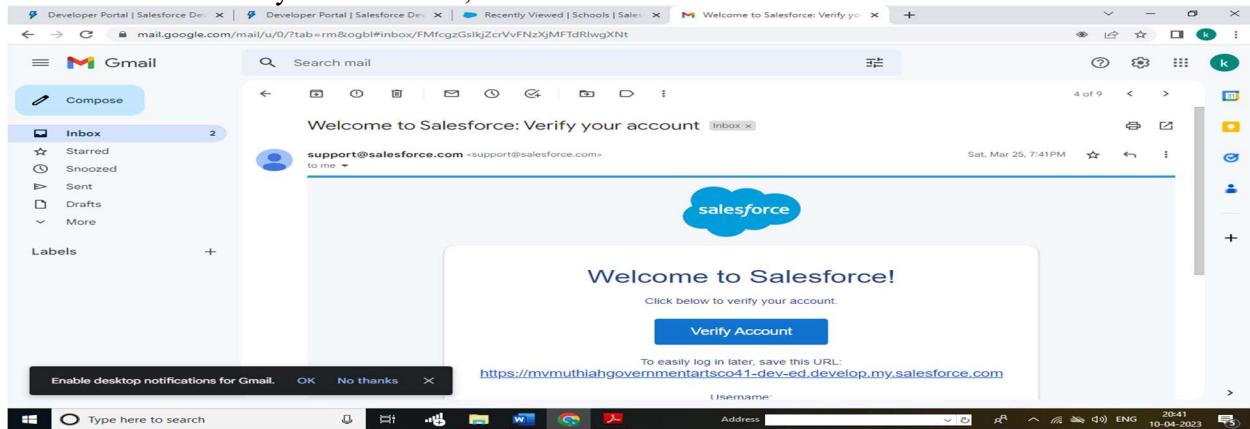
Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer
 - c. Company : College Name
 - d. County : India
 - e. Postal Code : pin code
 - f. Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com



Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login To Your Salesforce Account

- 1.Go to salesforce.com and click on login.
- 2.Enter the username and password that you just created.

3. After login this is the home page which you will see.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Licensing Experience Transition Assistant, Salesforce Mobile App, Licensing Usage Optimizer, Administration (Users, Data, Email), and Platform Tools (Subscription Management, Apps, Feature Settings, Slack, MultiSoft, Einstein, Objects and Fields, Events, Process Automation, User Interface, Custom Code). The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled 'Most Recently Used' with a list of 10 items, including 'Print pals' (User), 'Parents' (User), 'Teachers' (User), 'Parent Number' (Custom Field Definition), and 'Parent Address' (Custom Field Definition). The address bar at the top shows the URL: <https://mmvmutiahgovernmentartsco41-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home>. The taskbar at the bottom includes icons for File, Home, Object Manager, and a search bar.

Salesforce Login

<https://login.salesforce.com>

The screenshot shows the Salesforce login page. It features a large 'salesforce' logo at the top. Below it is a form titled 'Choose a Username' with a 'Saved Username' field containing 'kalaiselvijeyasutha09@gmail.com'. There's also a link to 'Log In with a Different Username'. To the right of the login form, there's a promotional banner for the Lightning Platform with the text 'Sell, market, and service with the world's #1 CRM.' and 'Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.' The banner includes a photo of a smiling man named 'Jay Sharma' and icons for Service, Sales, Marketing, and Loyalty. At the bottom of the page, there's a copyright notice: '© 2023 Salesforce, Inc. All rights reserved. | Privacy'.

Object

Creation of School Object

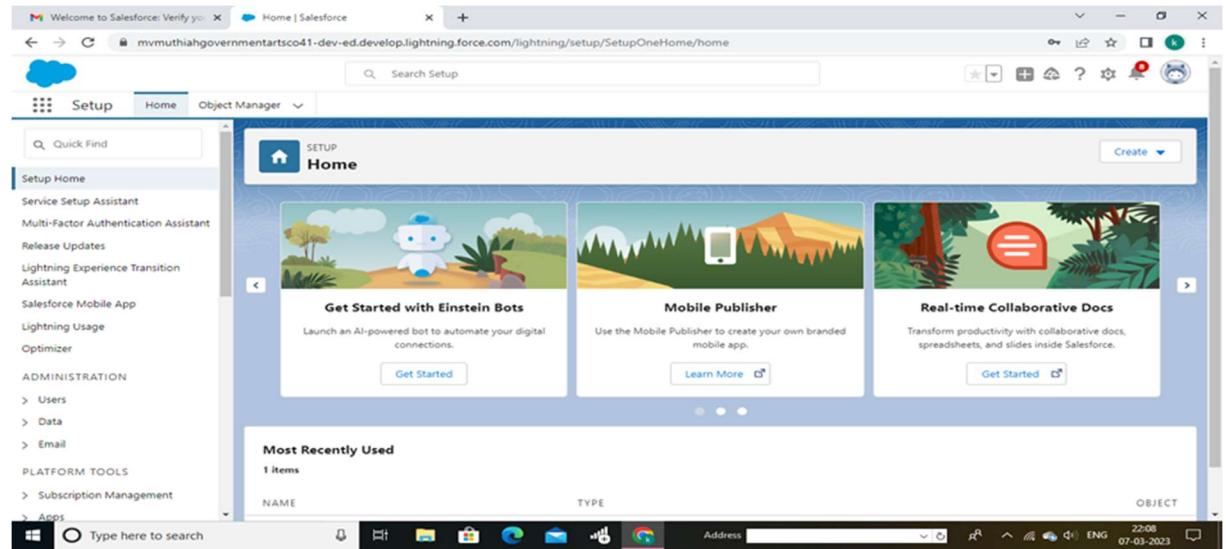
Creation of Objects for School Management:

Activity 1:

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.

1. Click on the gear icon and then select Setup.



2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown
click on that and select Custom Object.
 - On the Custom Object Definition page, create the object as follows:
 - Label: School
 - Plural Label: Schools
 - Record Name: School Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox
 - Click Save.

Welcome to Salesforce: Verify your setup

New Custom Object | Salesforce

mvmuthiahgovernmentartsco41-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

Search Setup

SETUP New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

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: Study

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Type here to search Address: 22:25 07-03-2023

Welcome to Salesforce: Verify your setup

New Custom Object | Salesforce

mvmuthiahgovernmentartsco41-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

Search Setup

SETUP New Custom Object

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: School Name Example: Account Name

Data Type: Text

Content Name: None

Optional Features

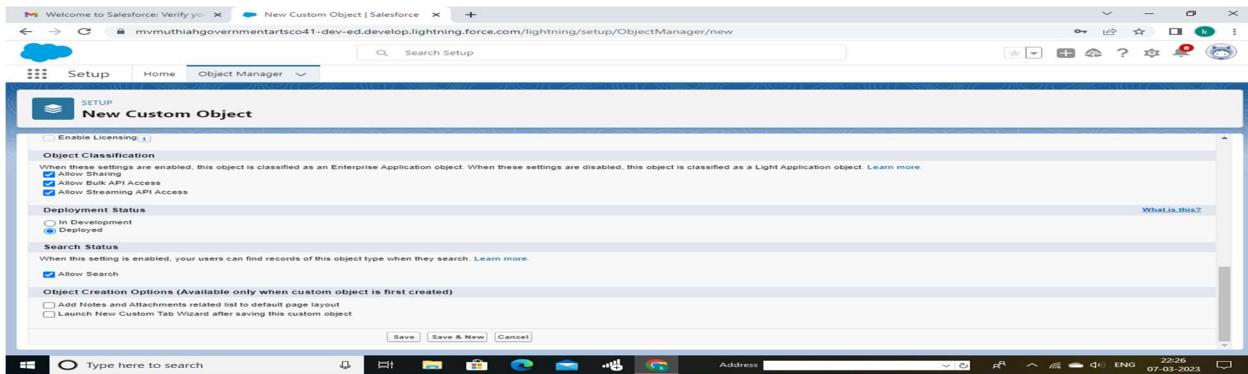
Allow Reports
 Allow Activities
 Track Field History
 Show in Chatter Groups
 Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

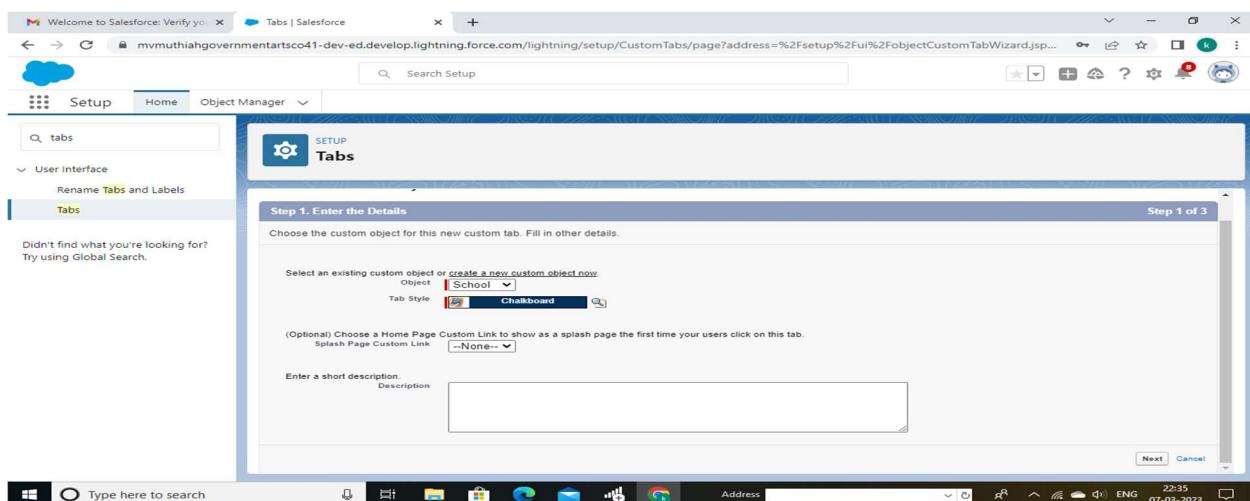
Allow Sharing

Type here to search Address: 22:26 07-03-2023



Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

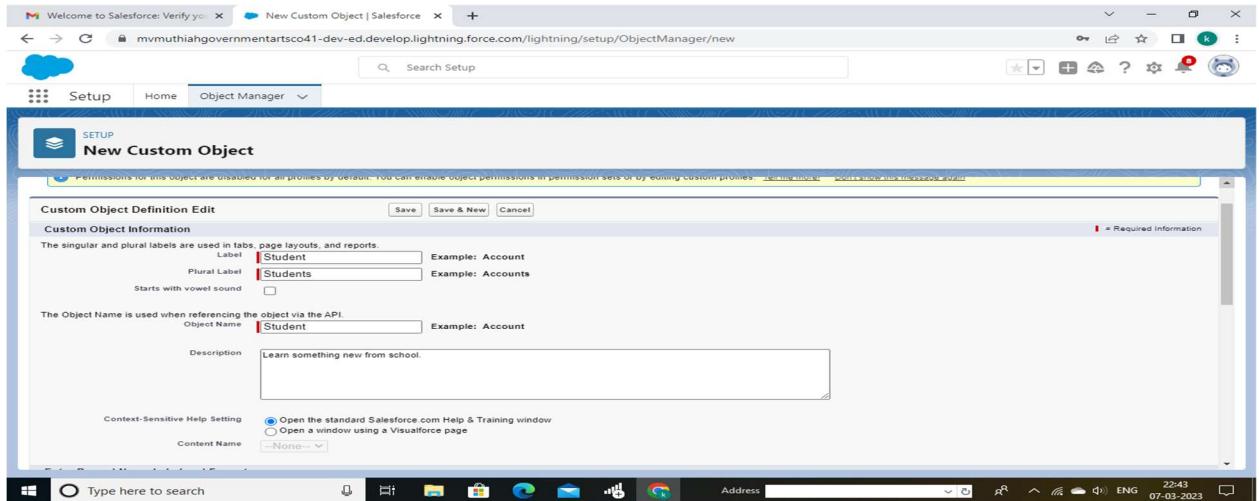
1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



Activity 2: Create student object

1. Click on the gear icon and then select Setup.
 2. Click on the object manager tab just beside the home tab.
 3. After the above steps, have a look on the extreme right you will find a Create Dropdown
click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:
 - Label: Students
 - Plural Label: Students
 - Record Name: Student Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox

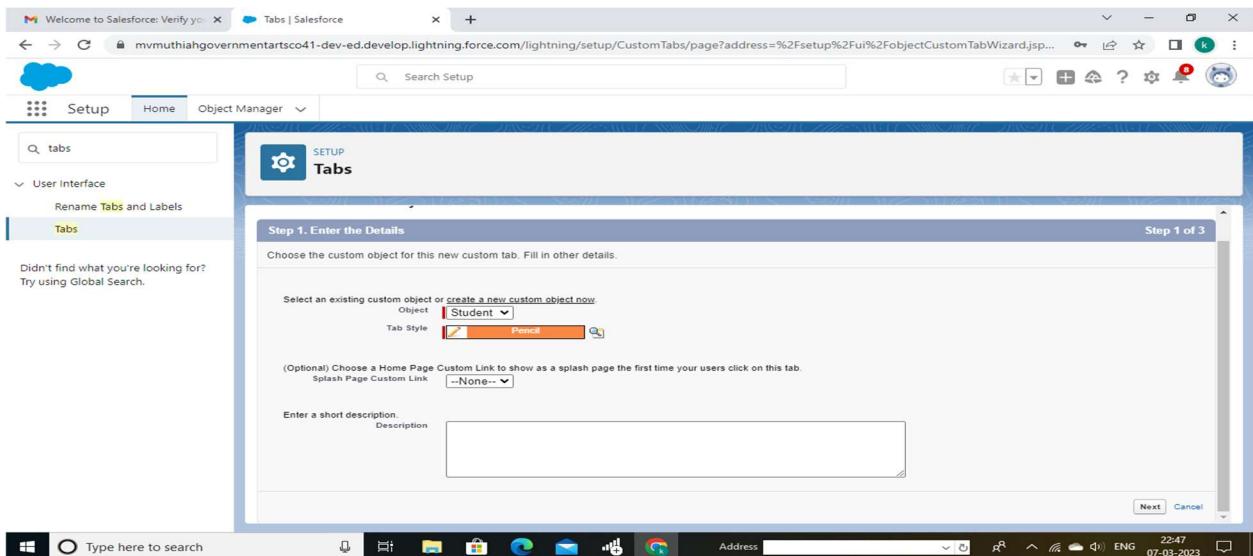
- Click Save.



Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Object Tabs, click New.

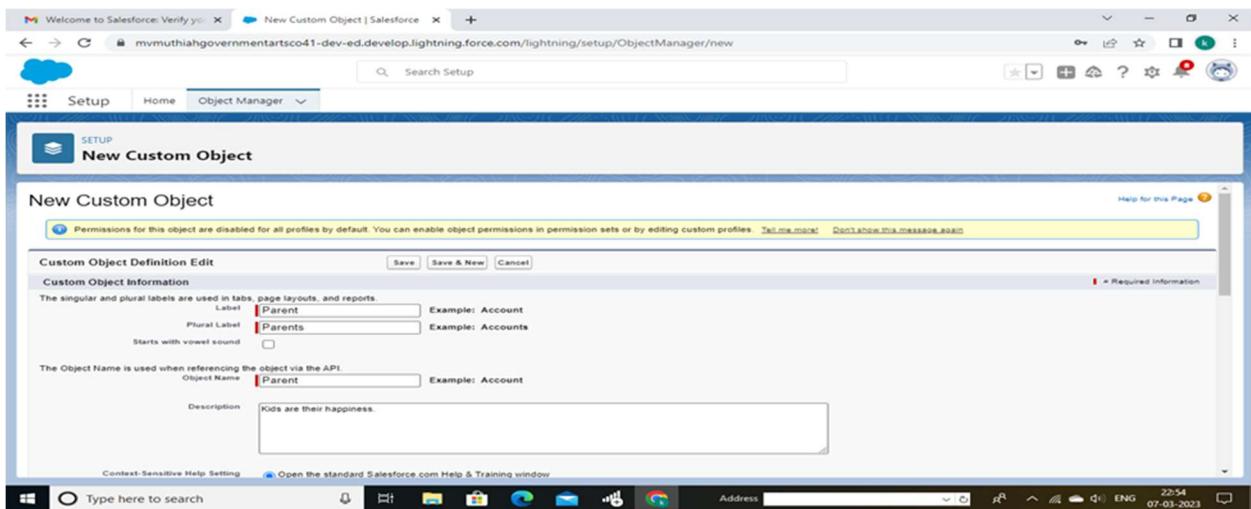
1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



Activity 3: Create parent object

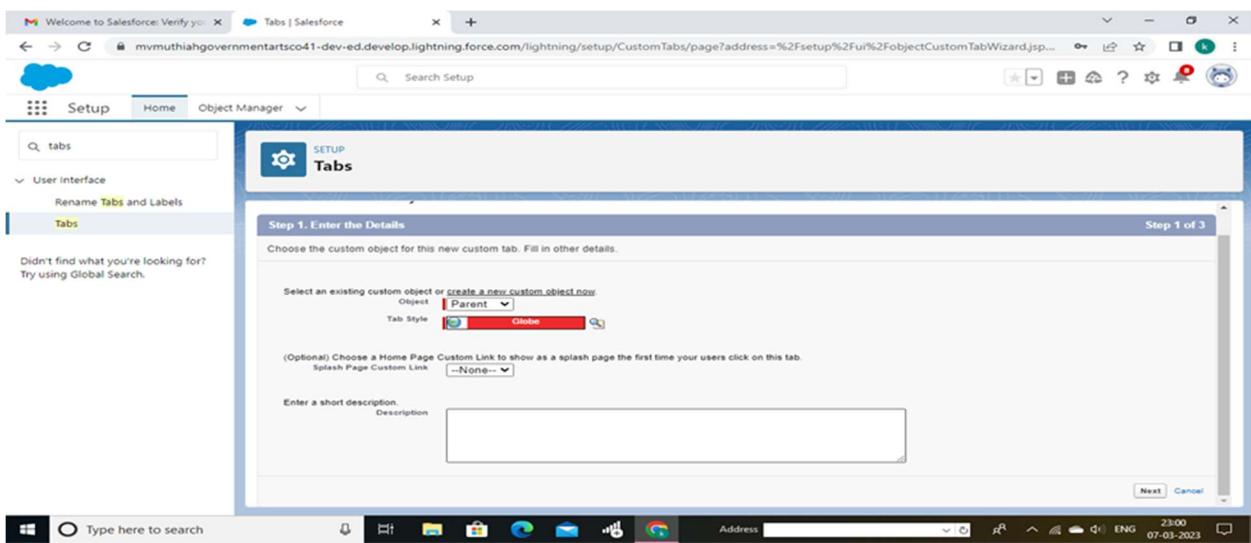
1. Click on the gear icon and then select Setup.
 2. Click on the object manager tab just beside the home tab.
 3. After the above steps, have a look on the extreme right you will find a Create Dropdown
click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:

- Label: Parent
- Plural Label: Parents
- Record Name: Parent Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.



Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
Under Custom Object Tabs, click New.

1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



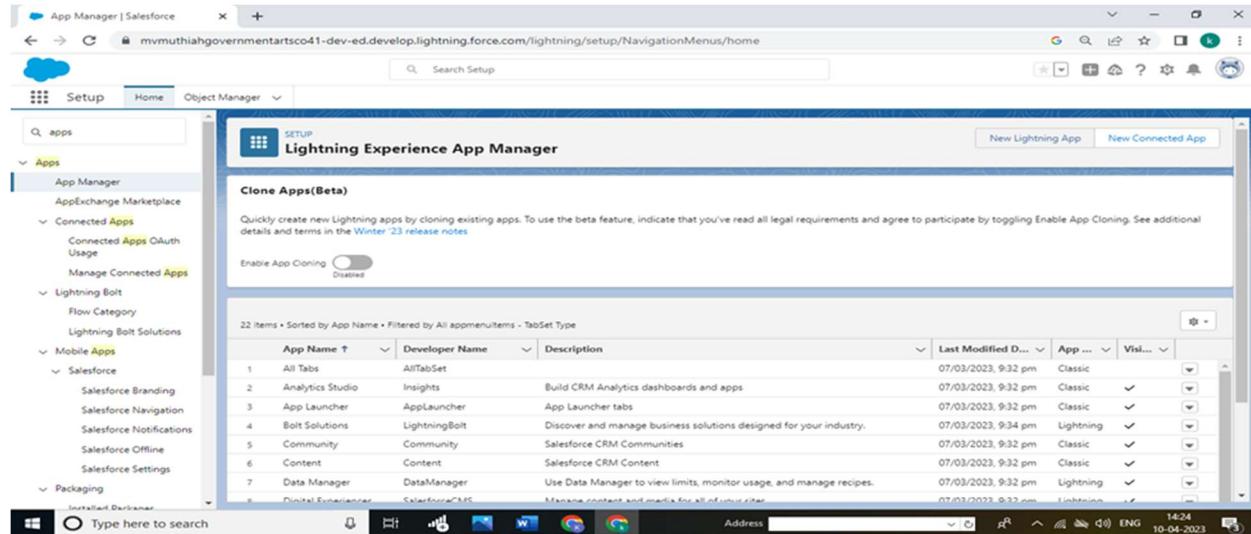
Lightning App

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. The simplest app usually has just two tabs

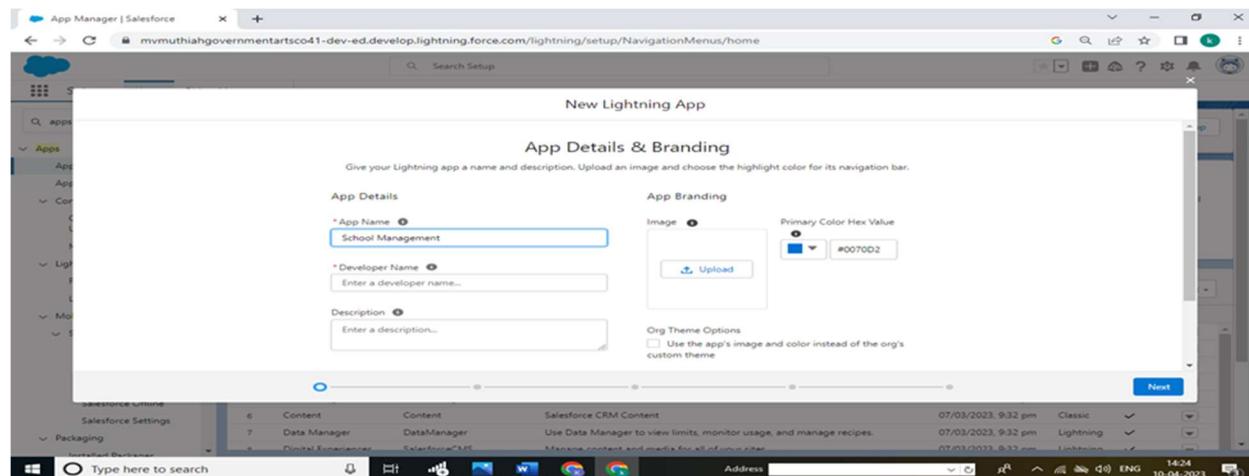
Activity:

Create the School Management app

- From Setup, enter App Manager in the Quick Find and select App Manager.

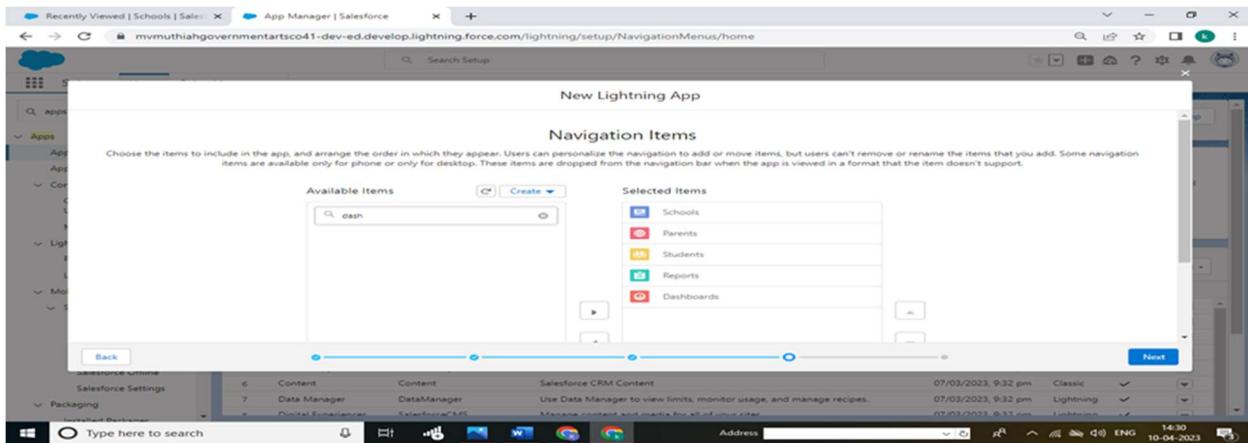
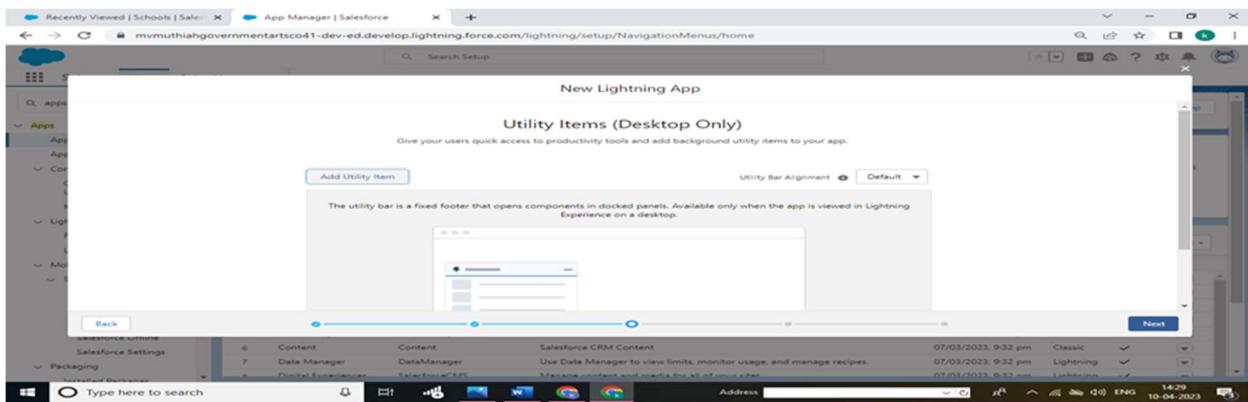
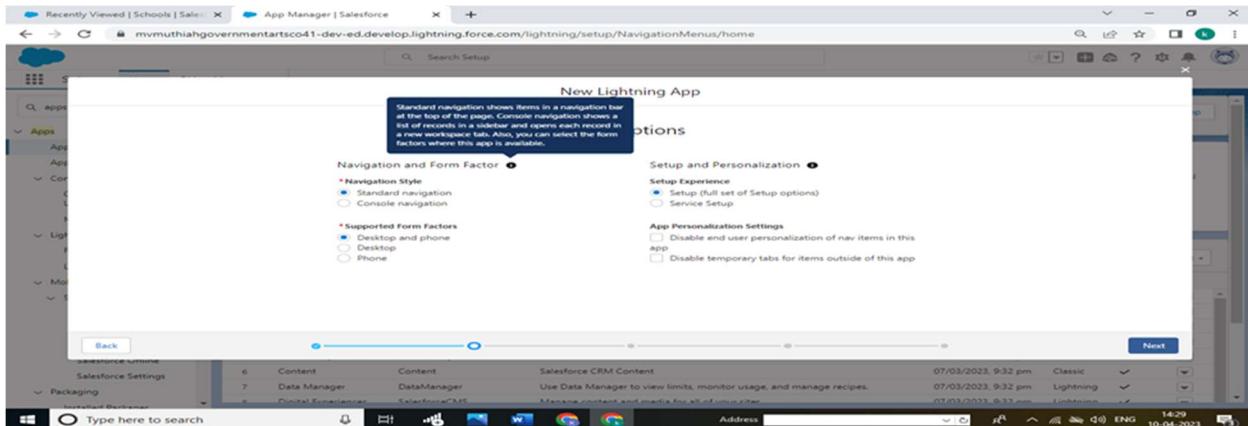


- Click New Lightning App. Enter School Management as the App Name, then click Next

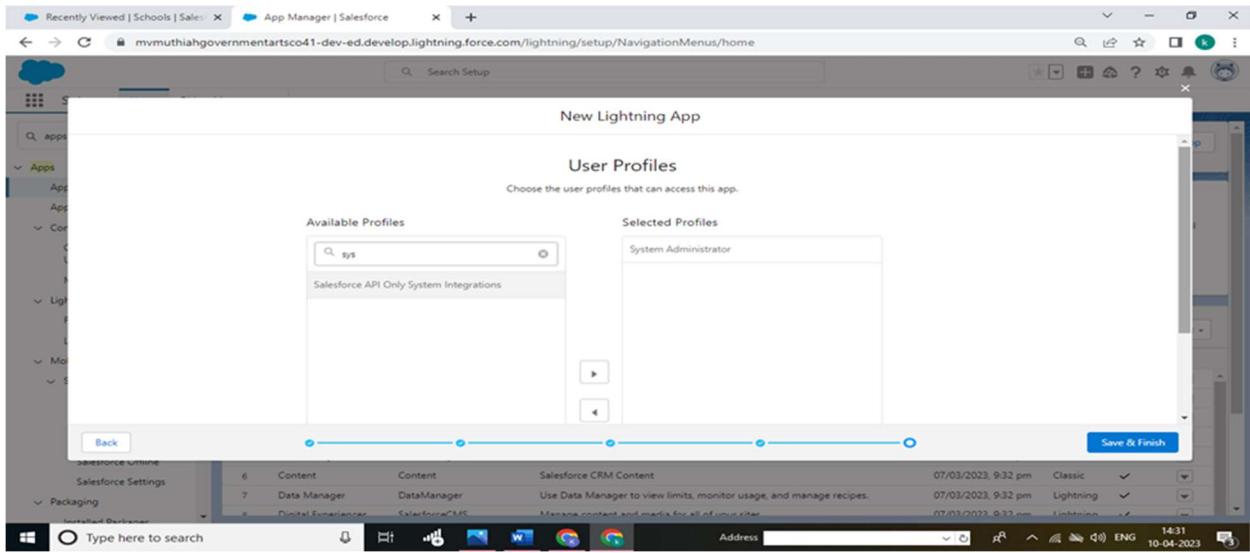


- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Schools, Students, Parents, Reports, and Dashboards and

move them to Selected Items. Click Next.



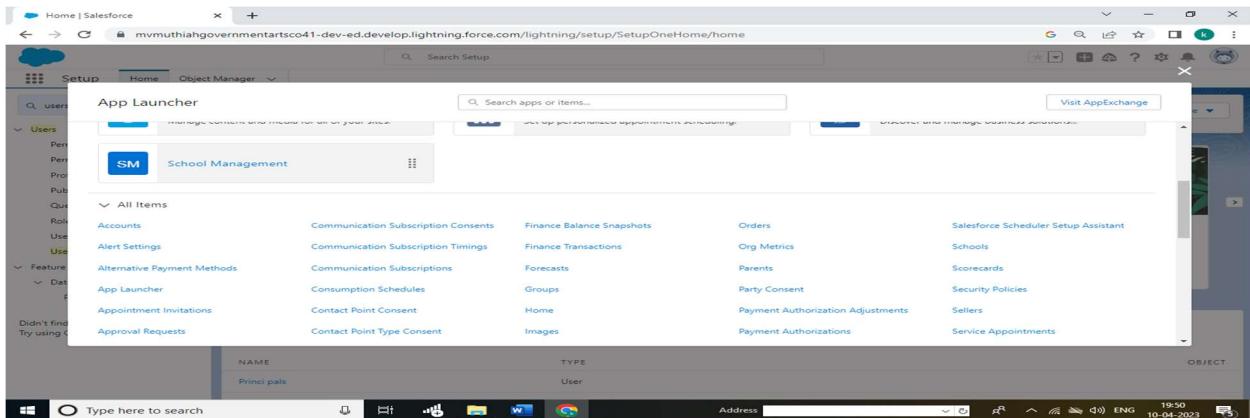
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



- To verify your changes, click the App Launcher, type School Management and select the School Management app.

Note:

- App Launcher-Displays available apps.
- App Name-Displays the current selected app.
- Navigation menu-Displays the tabs available inside the app.



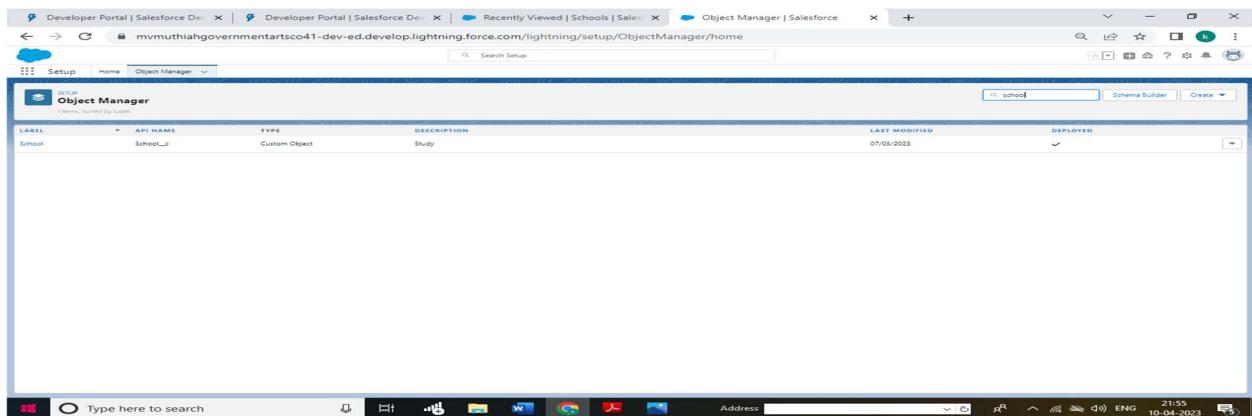
Fields and Relationship

An object relationship in Salesforce is a **two-way association between two objects**. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1:

Creation of fields for the School objects:

- click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.

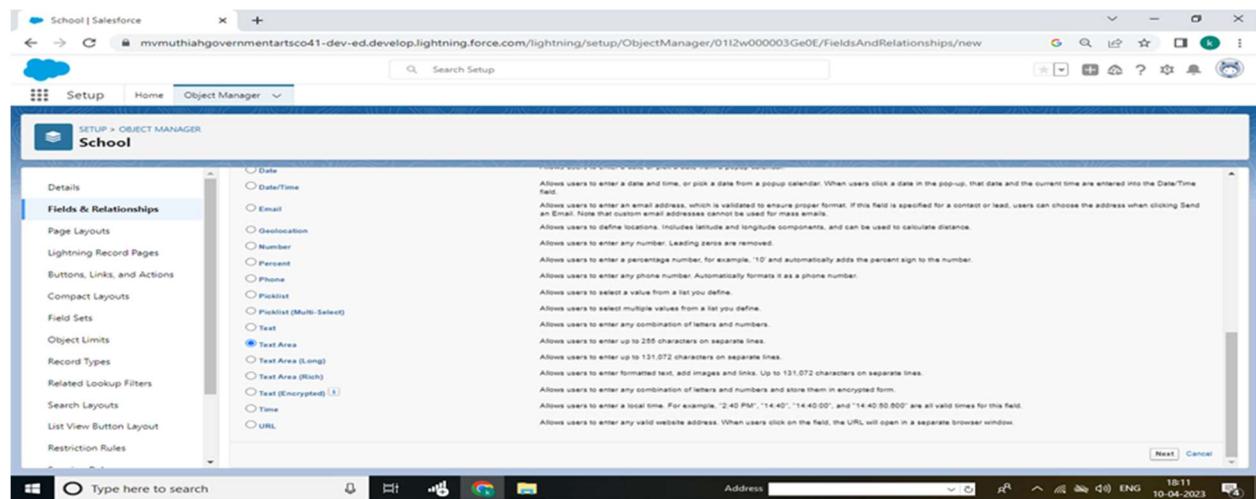


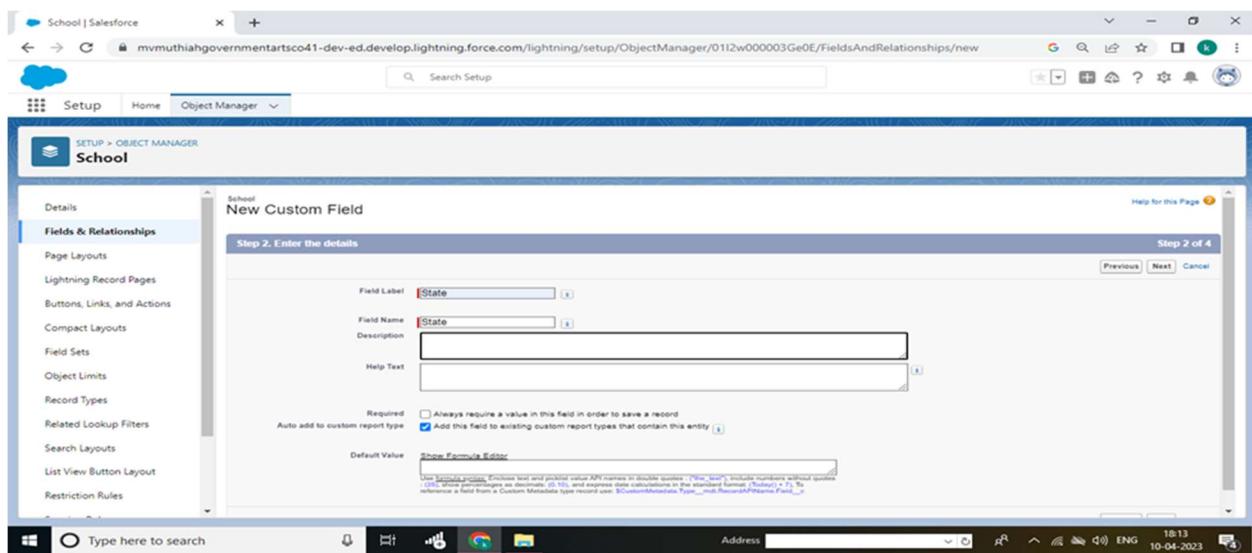
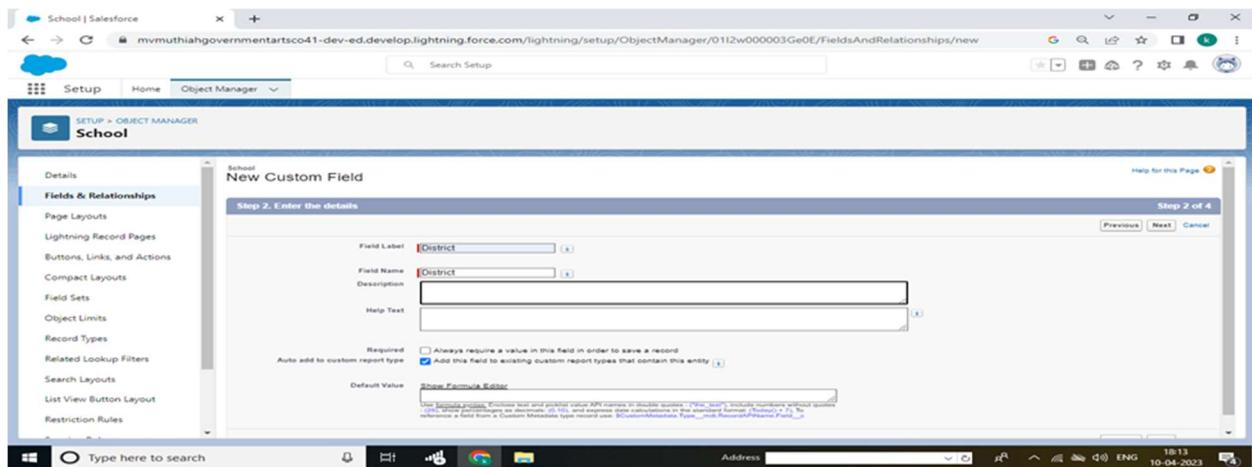
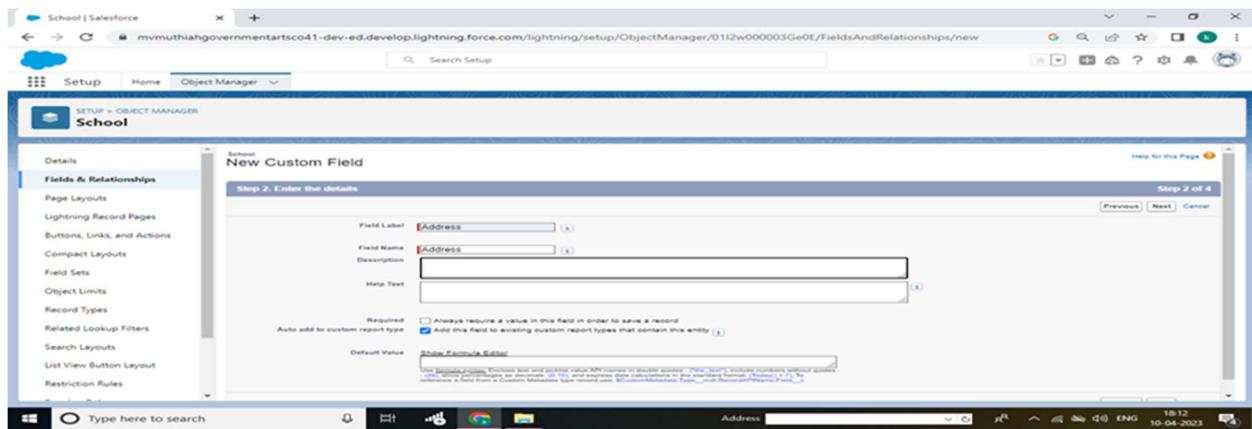
3. Select School.

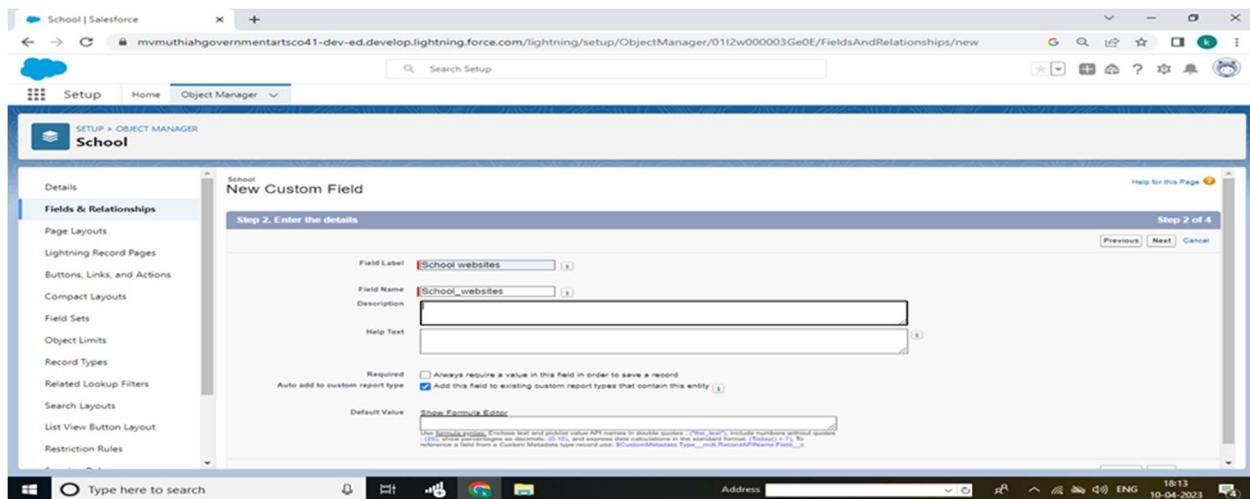
4. Select Fields & Relationships from the left navigation, and click New

Now we're ready to make a custom field. Let's do this!

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Address.
3. Click Next, Next, then Save & New.
4. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field labels.





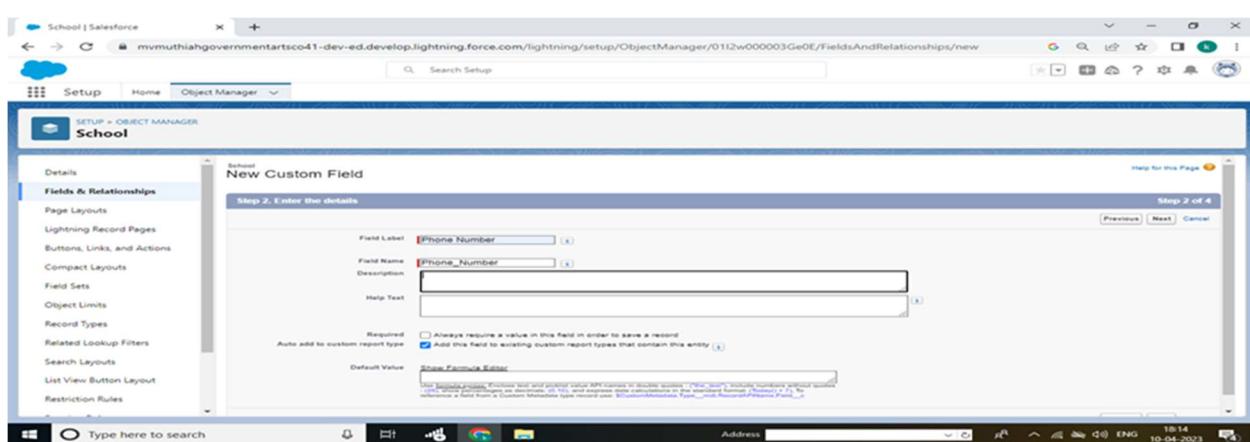
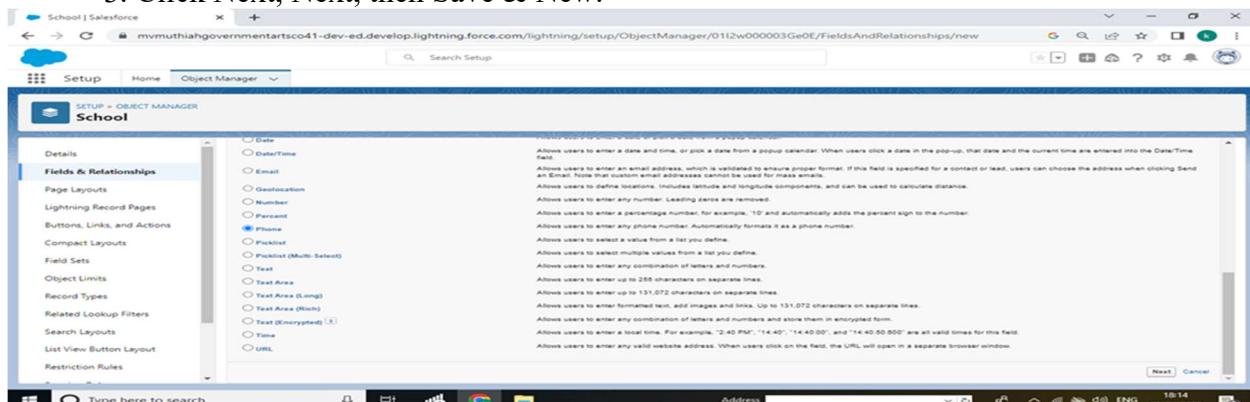


Now let's create the other fields and we must choose the data types of the fields carefully .Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type

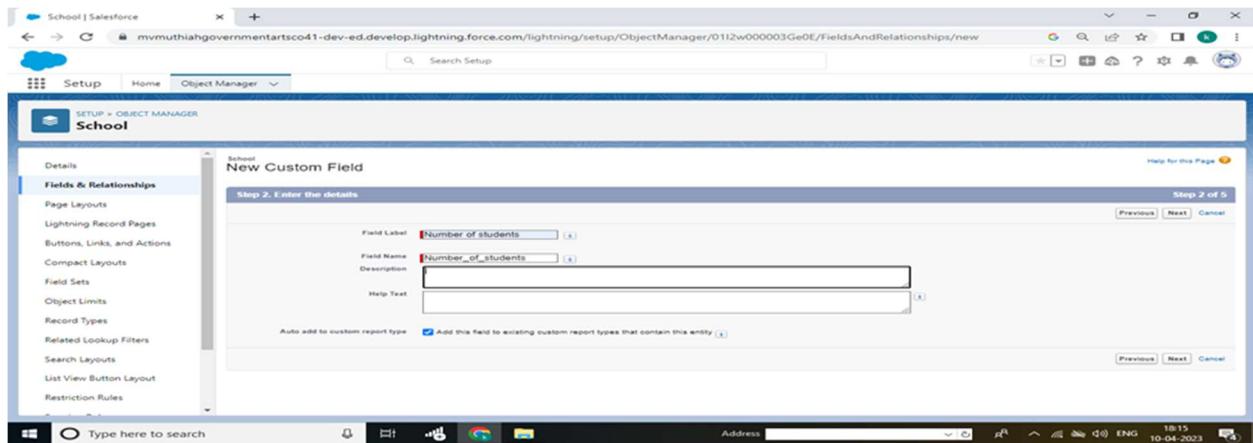
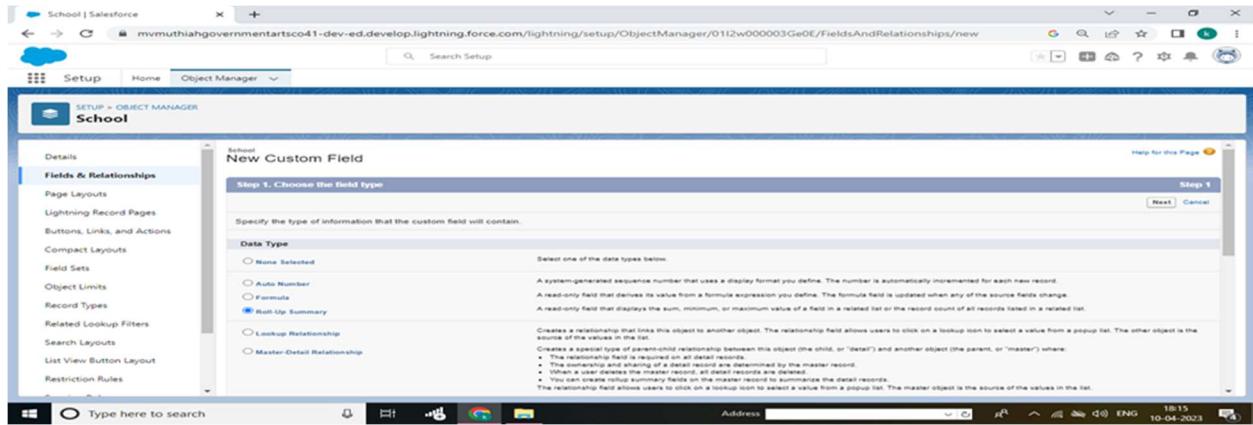
Lets see this

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

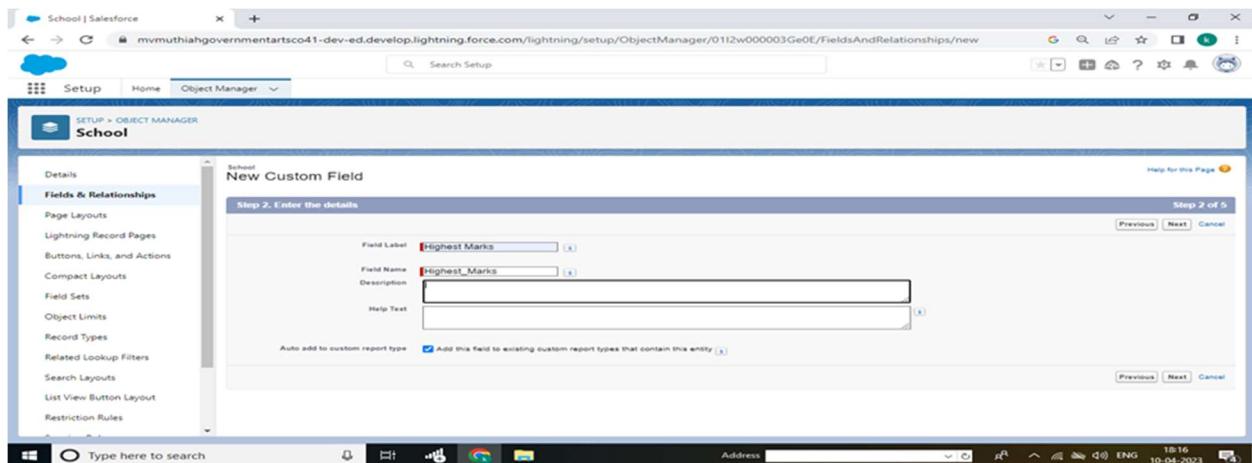


Lets create Roll-up summary fields to calculate the number of students

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Number of students
5. Click Next
6. Then select the master object summarized as students and then select count as roll-up and then click Next,Next and save.



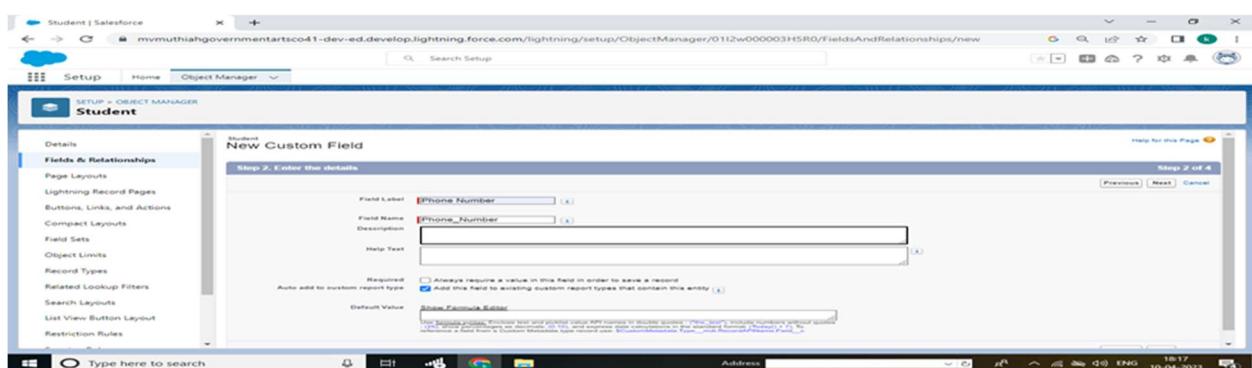
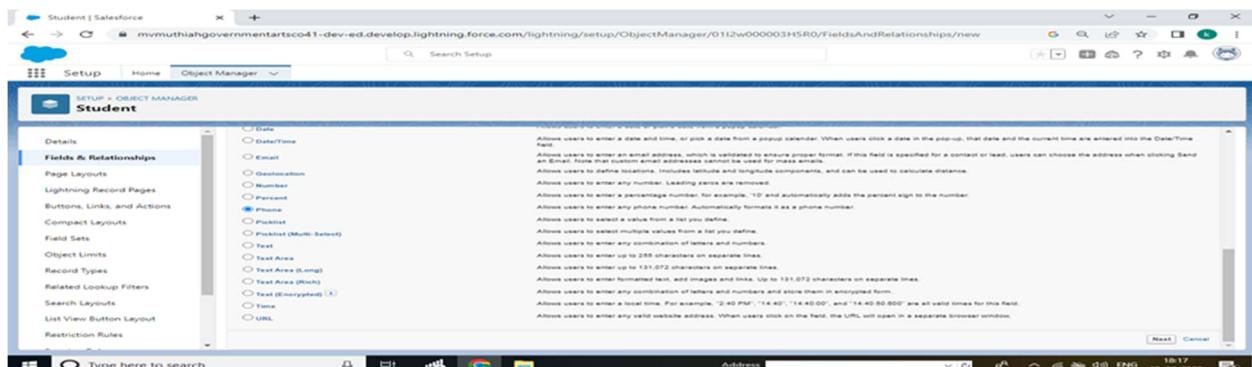
1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Highest Marks
5. Click Next
6. Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate.click Next,Next and save



Activity-2:

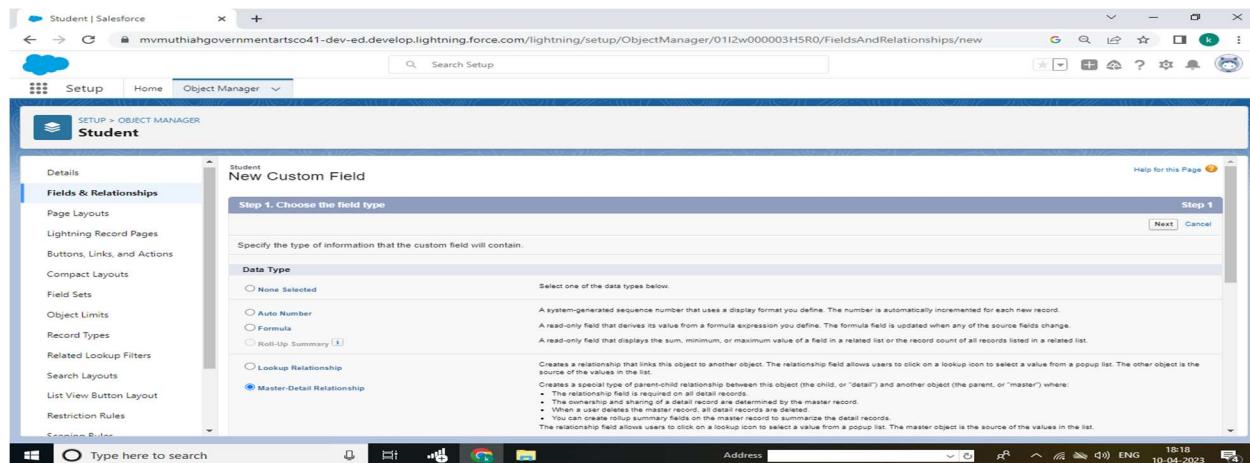
Creation of fields for the Student objects:

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New



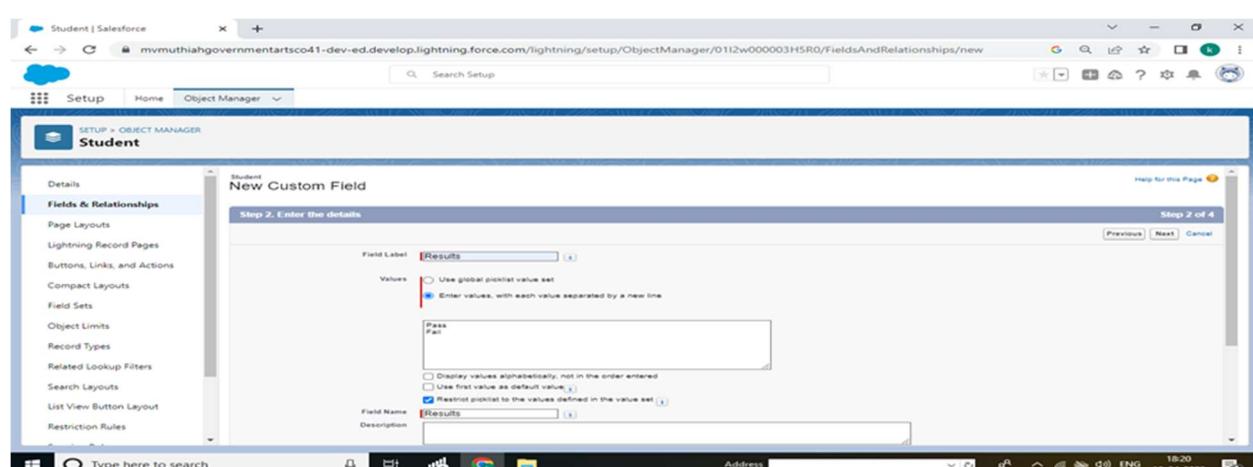
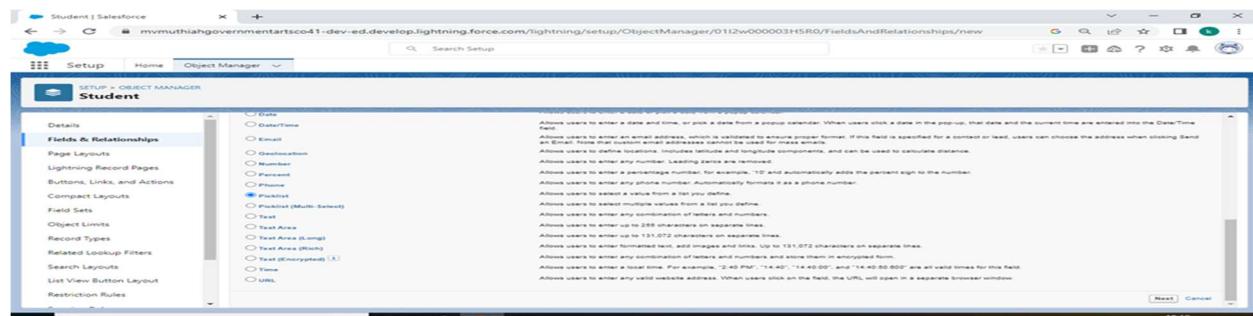
Let's create a master-detail relationship with school object

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.



Lets create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
6. Pass
7. Fail
8. Click Next, Next, then Save & New



Lets create a Number field:

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. Under Fields & Relationships, the 'Number' data type is selected and highlighted in blue. A large panel on the right provides detailed information about the Number field, including its description: "Allows users to enter any number. Leading zeros are removed." Below this, there are several other field types listed with their descriptions: Date, Date/Time, Email, Geolocation, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. At the bottom right of the panel are 'Next' and 'Cancel' buttons.

The screenshot shows the 'New Custom Field' creation process at Step 2. The 'Field Label' field contains 'Class'. The 'Length' field is set to 15. The 'Decimal Places' field is set to 0. Other fields like 'Field Name', 'Description', and 'Help Text' are also visible. At the bottom, there are checkboxes for 'Required', 'Unique', 'External ID', and 'AI Prediction'. A note at the bottom says 'Auto add to custom report type' with a checkbox. Navigation buttons 'Previous' and 'Next' are at the top right.

This screenshot shows the continuation of the 'New Custom Field' creation process at Step 2. The 'Field Label' field now contains 'Marks'. The 'Length' field is set to 18. The 'Decimal Places' field is set to 0. The 'Field Name' and 'Description' fields have been updated to 'Marks'. The 'Help Text' field is empty. The same checkboxes for 'Required', 'Unique', etc., are present at the bottom. The note about auto-add to report type is still visible. The navigation buttons 'Previous' and 'Next' are at the top right.

Activity-3:

Creation of fields for the Parent objects:

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.

The screenshot shows the 'Object Manager' interface for the 'Parent' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and displays a list of field types. The 'Text' type is selected, highlighted with a blue border. A detailed description of the 'Text' field is shown on the right, including its purpose and various sub-options like Text Area, Text Area (Long), Text Area (Rich), and Text (Encrypted).

The screenshot shows the 'New Custom Field' creation wizard, Step 2 of 4. The 'Field Label' is set to 'Parent Address'. The 'Field Name' is 'Parent_Address'. The 'Length' is set to 255. The 'Description' and 'Help Text' fields are empty. Under 'Required', there are two checkboxes: 'Always require a value in this field in order to save a record' (unchecked) and 'Do not allow duplicate values' (unchecked). Under 'Unique', there are three checkboxes: 'Treat "ABC" and "abc" as duplicate values (case insensitive)' (unchecked), 'Treat "ABC" and "abc" as different values (case sensitive)' (unchecked), and 'Set this field as the unique record identifier from an external system' (unchecked). The 'External ID' checkbox is checked. The 'Auto add to custom report type' checkbox is checked. The 'Add this field to existing custom report types that contain this entity' checkbox is checked.

4. Select the Phone as the Data Type, then click Next.

5. For Field Label, enter Parent Number.

6. Click Next, Next, then Save & New

The screenshot shows the 'New Custom Field' creation wizard, Step 2 of 4. The 'Field Label' is set to 'Parent Number'. The 'Field Name' is 'Parent_Number'. The 'Length' is set to 255. The 'Description' and 'Help Text' fields are empty. Under 'Required', there are two checkboxes: 'Always require a value in this field in order to save a record' (unchecked) and 'Do not allow duplicate values' (unchecked). Under 'Unique', there are three checkboxes: 'Treat "ABC" and "abc" as duplicate values (case insensitive)' (unchecked), 'Treat "ABC" and "abc" as different values (case sensitive)' (unchecked), and 'Set this field as the unique record identifier from an external system' (unchecked). The 'External ID' checkbox is checked. The 'Auto add to custom report type' checkbox is checked. The 'Add this field to existing custom report types that contain this entity' checkbox is checked.

Profile

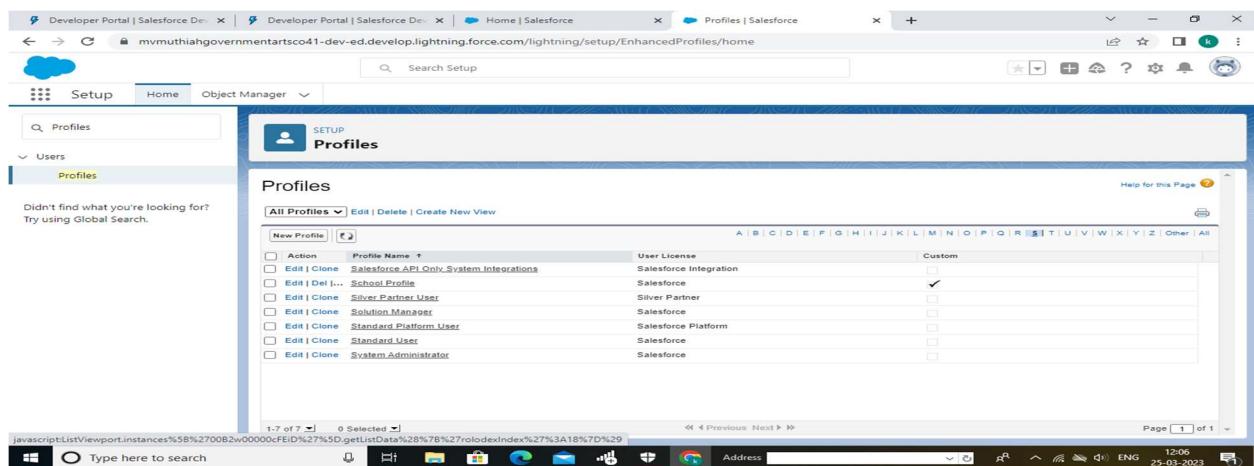
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges

Activity:

Creation on profile:

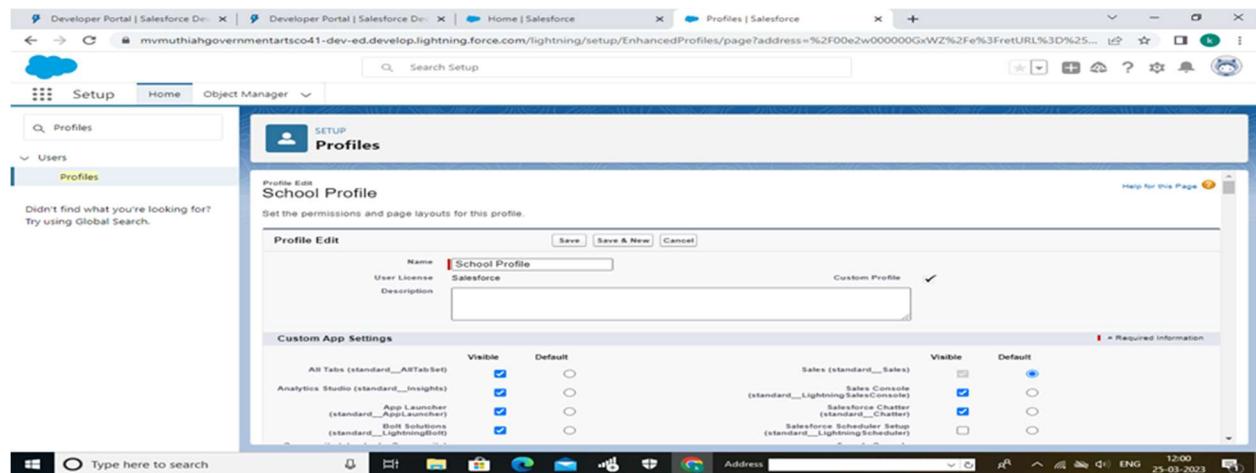
From Setup enter Profiles in the Quick Find box, and select Profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.



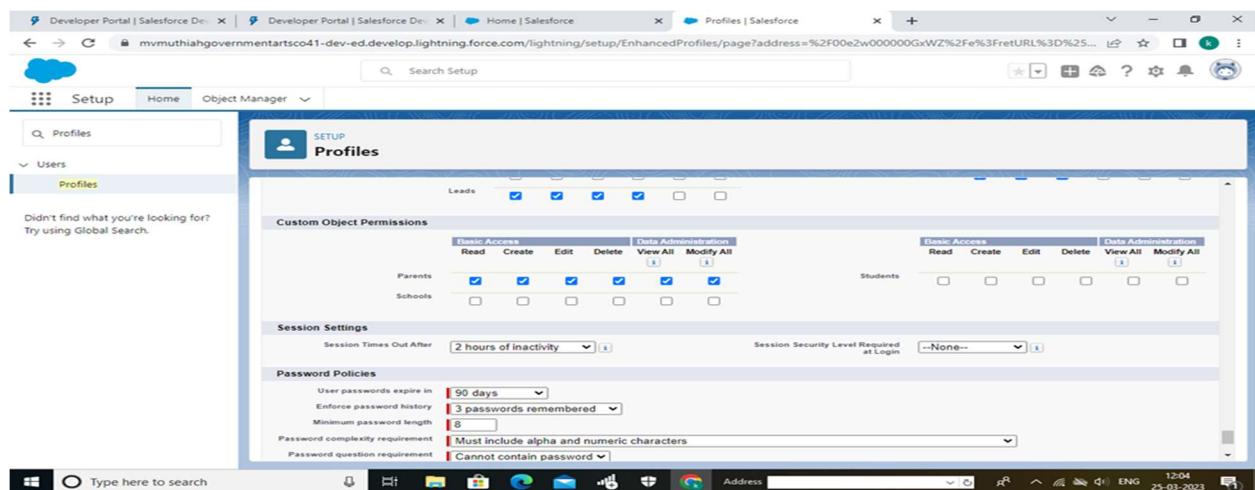
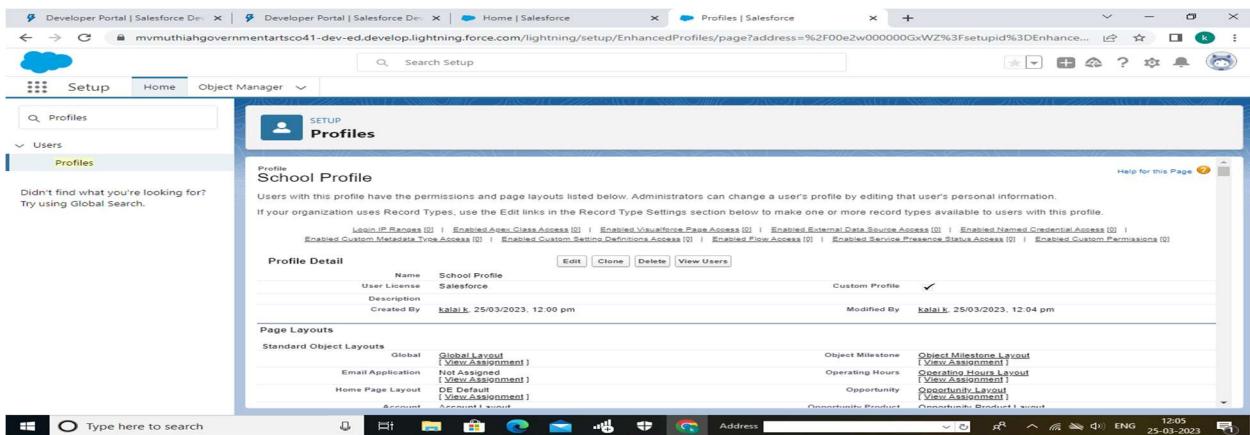
The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The 'Profiles' section displays a list of profiles. The 'Standard User' profile is visible in the list. The interface includes a search bar, a navigation bar with tabs like 'Setup', 'Home', and 'Object Manager', and a top menu with various icons.

3. For Profile Name, enter School profile.



The screenshot shows the 'School Profile' edit screen. The 'Name' field is set to 'School Profile'. The 'User License' is set to 'Salesforce'. The 'Custom Profile' checkbox is checked. The 'Custom App Settings' section shows various application settings with checkboxes for visibility and default status. The interface includes a search bar, a navigation bar with tabs like 'Setup', 'Home', and 'Object Manager', and a top menu with various icons.

4. Click Save.
5. While still on the School profile page, then click Edit.
6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile



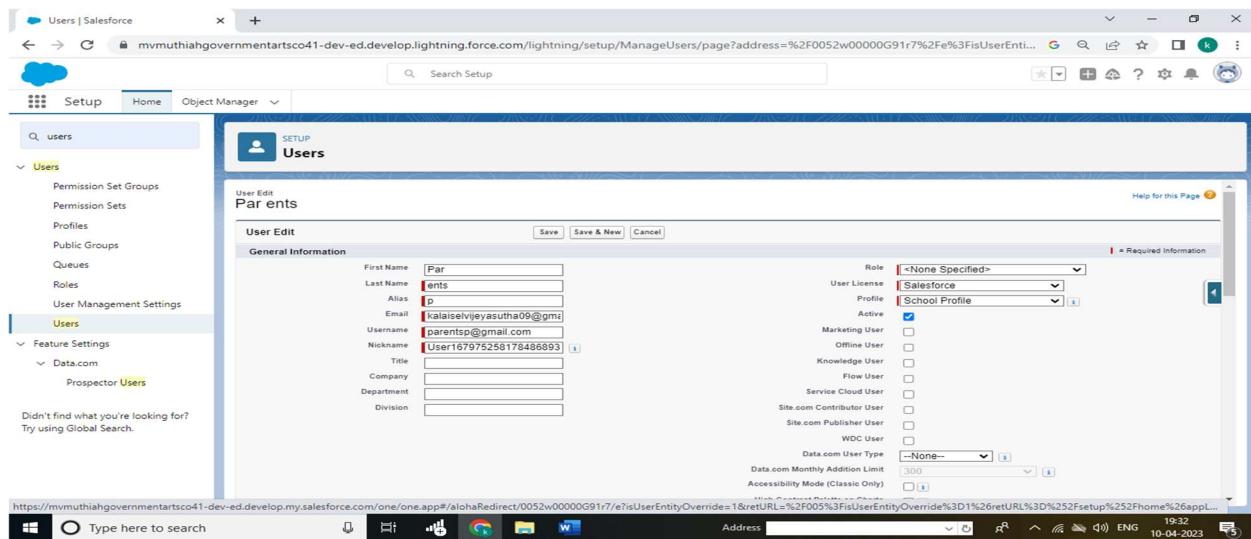
Users

A user is **anyone who logs in to Salesforce**. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

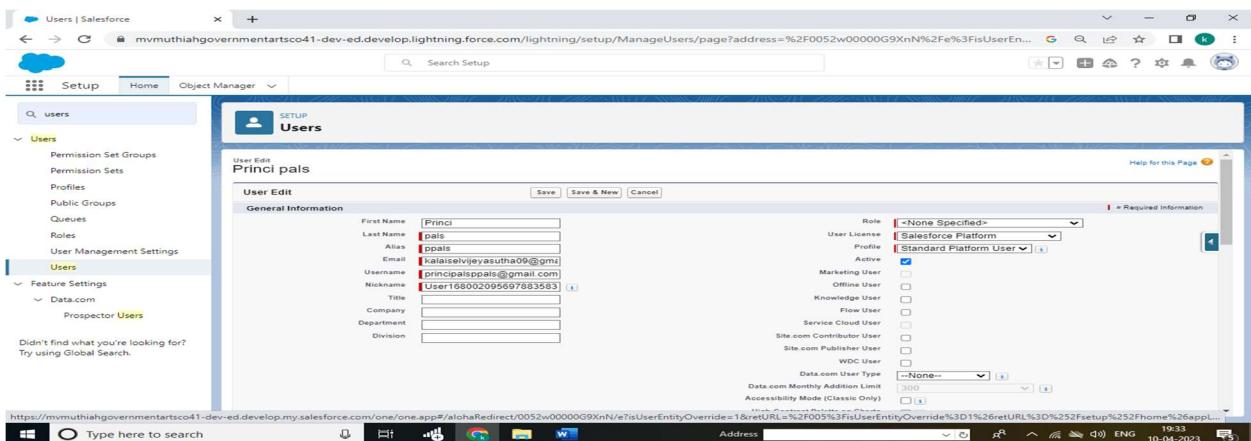
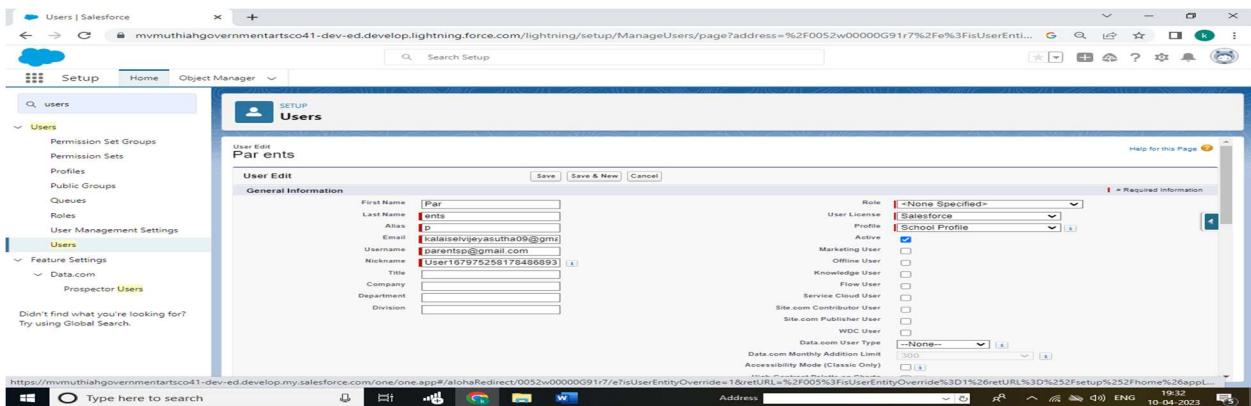
Activity:

Creating a User:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a User License As salesforce.
5. Select a profile as a School profile.
6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



7. Similarly follow the above steps and create 3 users as Teachers and principals.



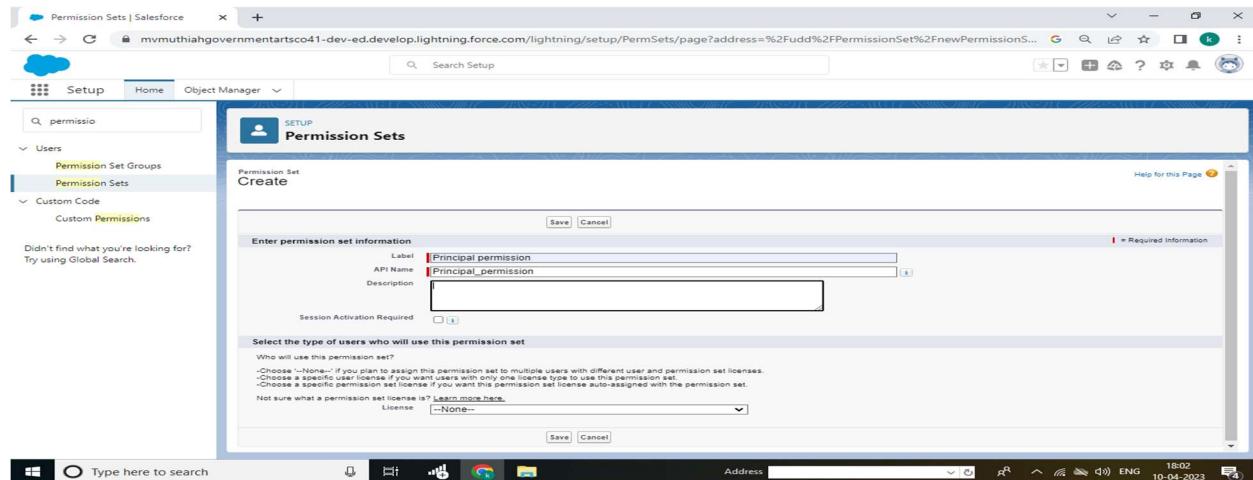
Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

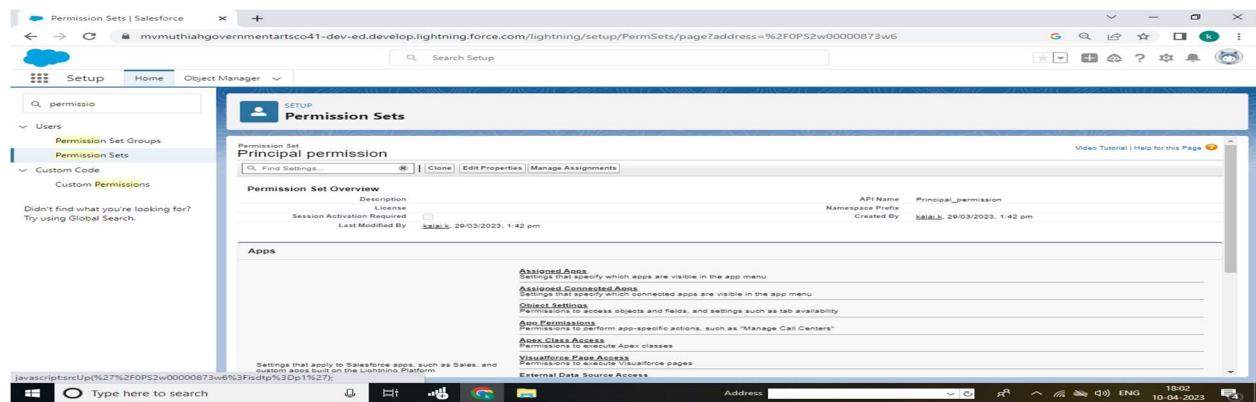
Activity-1:

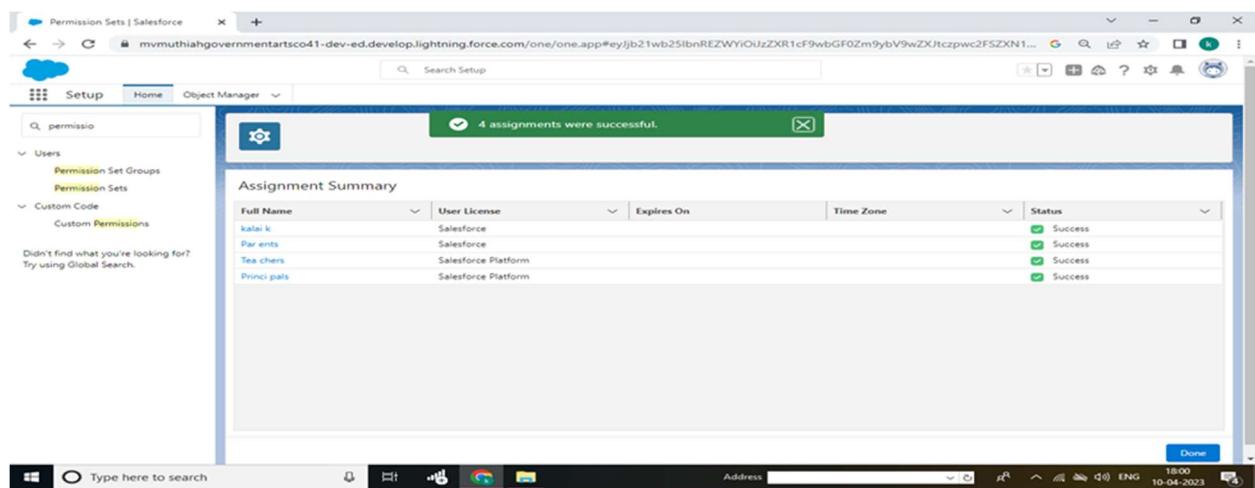
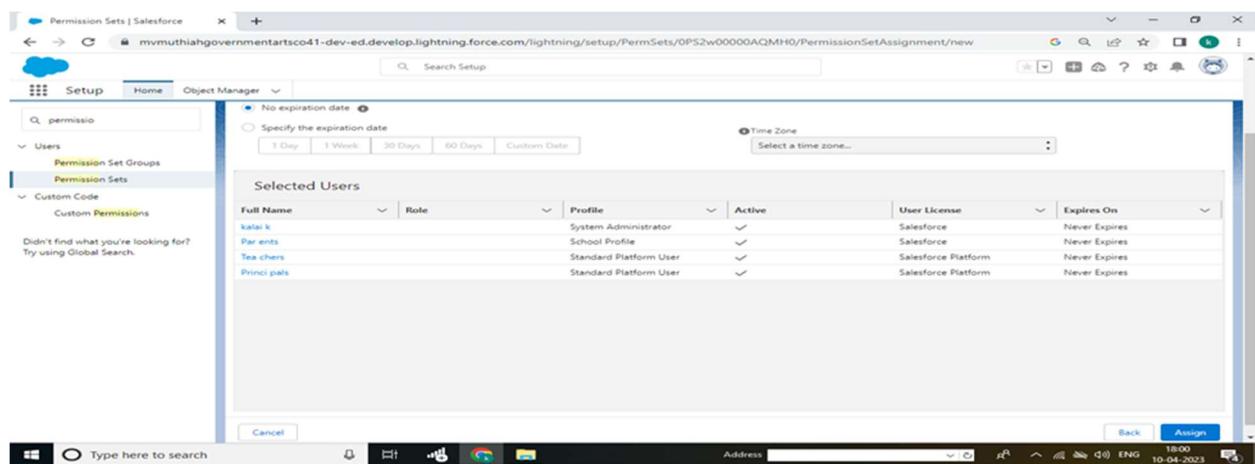
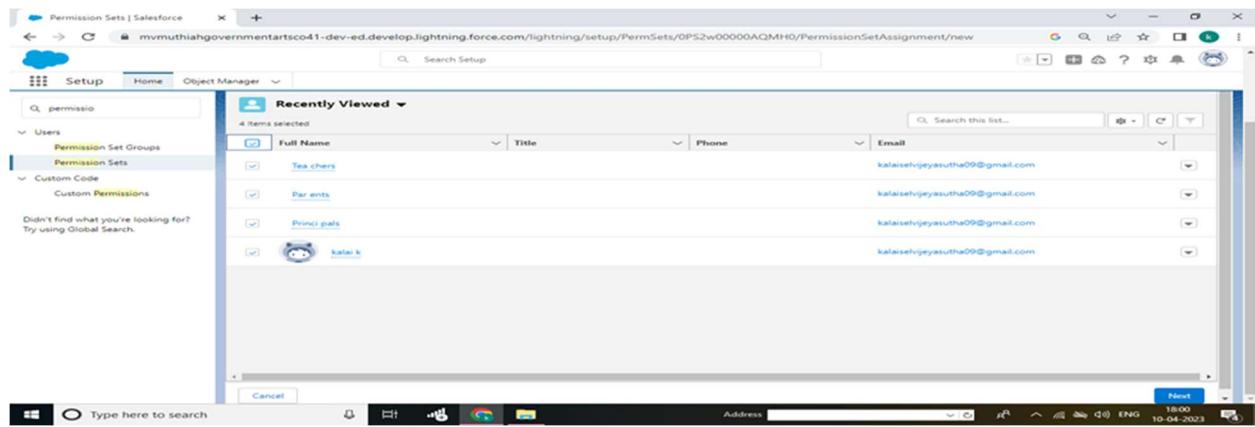
Permission sets 1:

- From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- Click New.



- Give the name of the Permission set name as principal permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the principal user



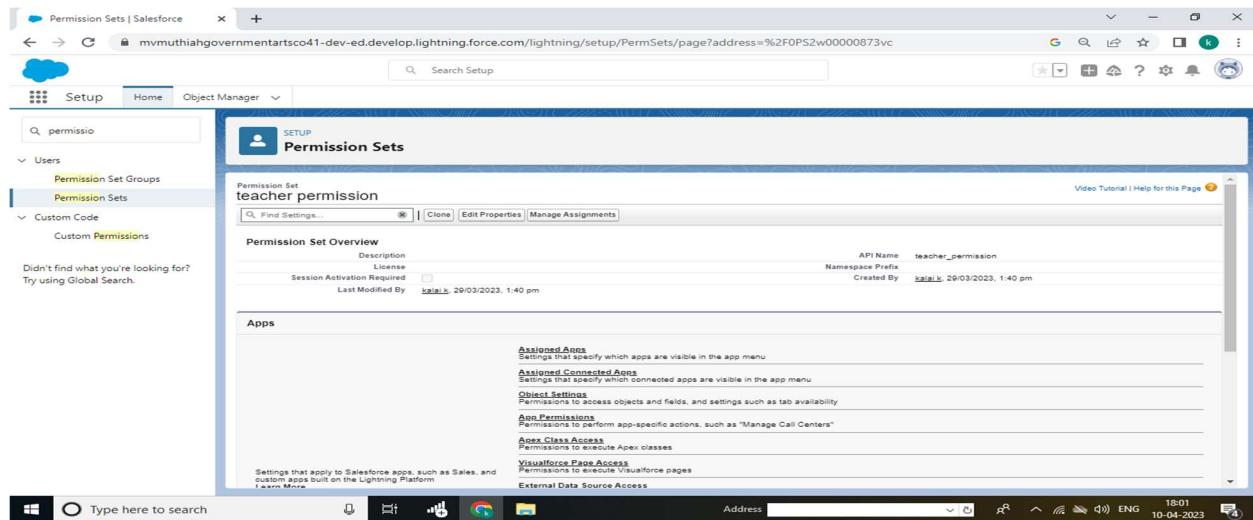


Similarly follow the above steps for the permission set 2.

Activity-2:

Permission sets 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as teacher permission and then under the object settings give all permissions for the custom objects and assign them to the teacher user

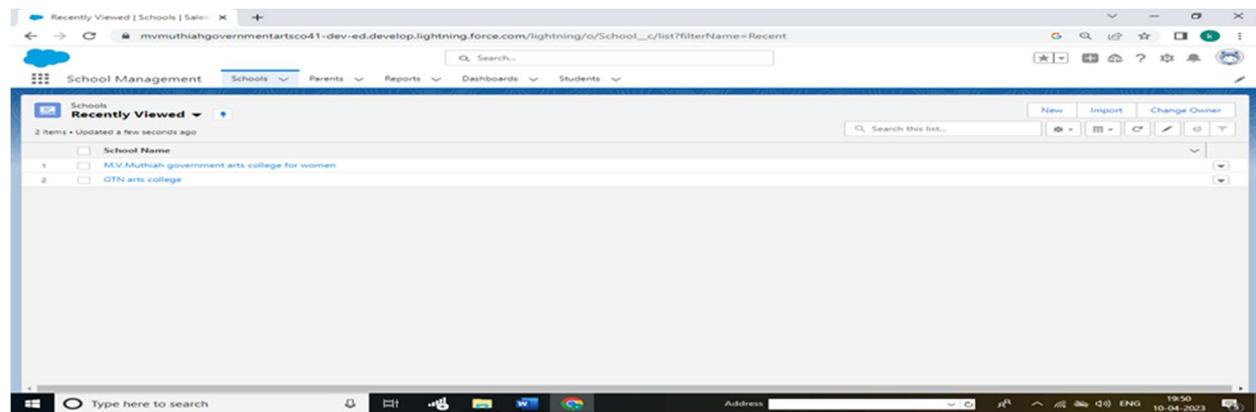


Reports

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.

Activity:

Reports :



The image consists of three vertically stacked screenshots of a web-based school management system. Each screenshot shows a 'Recently Viewed' list under a specific category.

- Students:** Shows a list of recently viewed students. The list includes:
 - 1 sutha
 - 2 kalyani
 - 3 Kalaiselvi
- Parents:** Shows a list of recently viewed parents. The list includes:
 - 1 Jeyasutha
 - 2 Kathiresan
- Reports:** Shows a list of recently viewed reports. The list includes:
 - 1 New Schools with Students Report

1. From the Reports tab, click New Report.
2. Select the report type as School with students and parents for the report, and click Create.

A screenshot of the 'Reports' page in the School Management application. A new report has been created and is displayed in the list. The report details are as follows:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Schools with Students Report		Private Reports	Kalai K	29/3/2023, 2:13 pm	

3. Customize your report, then save or run it.

School	School Name	Address	District	Highest Marks	Number of students	Phone Number	School website	Student Name	Class	Marks	Phone Number	Results
1	M V Muthiah government arts college for women	Karapakamur Road, Almenachonmakkampatti, Dindigul-624001	Dindigul	100	3	+91 9460120	mvmugacitg.ac.in	Kalaiselvi	1	100	+91 9396558777	Pass
2	M V Muthiah government arts college for men	Karapakamur Road, Almenachonmakkampatti, Dindigul-624001	Dindigul	100	3	+91 9460120	mvmugacitg.ac.in	Subha	1	100	+91 9396558777	Pass
3	M V Muthiah government arts college for women	Karapakamur Road, Almenachonmakkampatti, Dindigul-624001	Dindigul	100	3	+91 9460120	mvmugacitg.ac.in		3	800		Pass

4 Trailhead Profile Public URL

Trail lead- K Kalaiselvi - <https://trailblazer.me/id/kk02tb>

Team Member 1- B Iswarya

Team Member 2-C Kalaiselvi

Team Member 3-G Kalpana

5 ADVANTAGES & DISADVANTAGES

ADVANTAGES:

- ✓ It allows for the consolidation of customer data and the basis for deep insights.
- ✓ It speeds up the sales conversion process.
- ✓ It increases staff productivity, lowering time cost.
- ✓ It allows geographically dispersed teams to collaborate effectively.
- ✓ Improves customer experience by allowing personalisation and improved query resolution.

DISADVANTAGES:

- Customer experience may worsen due to staff over-reliance on the system.
- Security and data protection issues with centralised data.
- The excess initial time and productivity cost at the implementation.
- Requires a process-driven sales organisation.
- CRM may not suit all business.

6 APPLICATIONS

CRM solution can help keep track of contacts within a business, to allow both sales and marketing teams to personalize communication.

Best CRM solution:

- Salesforce Sales Cloud
- Zoho
- ClickUp

7 CONCLUSION

CRM systems are most commonly used for recruitment and admissions with 57% of institutions using the CRM systems for both processes.

Smaller institutions tend to use a proprietary CRM system more often than existing standard systems.

It is impossible to recommend any system in particular, as every system in this report comes with unique functionalities that different institutions might find useful.

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 future of Customer Relationship Management software. It is really the future of business.

