

PROJECT REPORT

Submitted to Bharathiar University, Coimbatore.

In partial fulfillment of the requirements for the award of the degree of
BACHELOR OF SCIENCE IN PHYSICS



Under the Guidance of

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DEPARTMENT OF PHYSICS

CHIKKANNA GOVERNMENT ARTS COLLEGE

TIRUPPUR- 641 602.

APRIL - 2023

Submitted by

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TITLE : A CRM APPLICATION FOR
SCHOOLS/COLLEGES

CHIKKANNA GOVERNMENT ARTS COLLEGE/

DEPARTMENT OF COMPUTER SCIENCE

NAAN MUDHALVAN PROJECT WORK
(AFFILIATED TO BHARATHIAR UNIVERSITY)
TIRUPUR-641602

TITLE : CRM APPLICATION FOR SCHOOL & COLLEGES

This is to certify that this is a bonafide record of work done by the above
students
of III B.Sc (PHY) Degree NAAN MUDHALVAN PROJECT during the year

.....

Submitted for the Naan Mudhalvan project work held

on.....20

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1.INTRODUCTION:

1.1 OVERVIEW:

Enrolling students in schools and colleges has multiple activities involved in processes for their personal, family, data, A CRM products owner has requested to create two applications, one is a sales app for sales reps to use this applications and store student data, and the second applications is a service app for service reps /agents to provide support to customers in dealing cases.

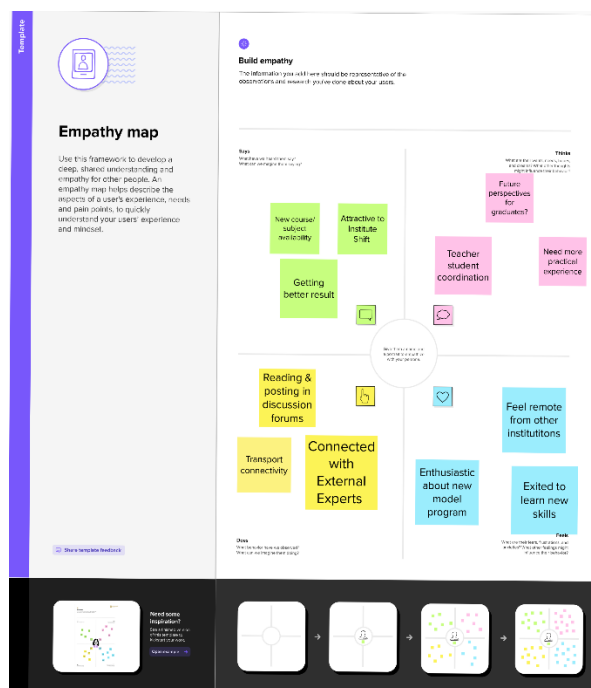
1.2 PURPOSE:

To manage students admissions in schools and colleges a specific application utility software is highly essential. Such a software development is our primary objective purpose. It is including tracking of applications, processing payments, and managing inventory levels. This can help field to ensure that processes are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

PROBLEM DEFINITION & DESIGN THINKING.

2.1 EMPATHY MAP

visualization used to articulate what we know about a particular type of user. It externalizes knowledge about users in order to 1) create a shared understanding of user needs, and 2) aid in decision making.



IDEATION AND BRAINSTROMING

Time of Day and Seasonal Patterns: Develop a model that captures time of day and seasonal patterns in flight delays, such as peak travel times, holiday seasons, and weather-related patterns. The model can help airlines proactively manage operations during high-impact periods to reduce delays.

Airport Congestion Prediction: Build a model that predicts flight delays based on airport congestion levels, such as runway capacity, air traffic control delays, and gate availability. The model can help airlines anticipate potential congestion-related delays and make operational adjustments accordingly.

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

PROBLEM

How might we [your problem statement]?



Key rules of brainstorming

To run a smooth and productive session

- Stay in topic.
- Defer judgment.
- Go for volume.
- Encourage wild ideas.
- Listen to others.
- If possible, be visual.

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Madhankumar N

Reverse course	Alternative to an existing program	Adopting a different approach

Maharajan M

Easy start-up process	Transparent reference system	Easy payment model

Palanivel E

Providing a framework to post payment	Offering flexible new payment options	Increasing data capture capacity

Prabhu P

Home assessment	Lowest budget item	Value and maintenance during course study

Person 5

Person 6

Person 7

Person 8

RESULT:

3.1 DATA MODEL:

OBJECT NAME	FIELDS IN THE OBJECT	
SCHOOL	FIELD LABLES	DATA TYPES
	ADDRESS	TEXT AREA
	PHONE NUMBER	PHONE
STUDENT	FIELD LABLES	DATA TYPES
	RESULTS	PICK LIST
	CLASS	NUMBER
PARENT	FIELD LABLES	DATA TYPES
	PARENT ADDRESS	TEXT AREA
	PHONE NUMBER	PHONE

Creation of an Application for school Management

This Project helps you to maintain and manage the school related problems which further can be modified based on the requirements.

Project Description

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 into their resume as well.

Milestone-1:

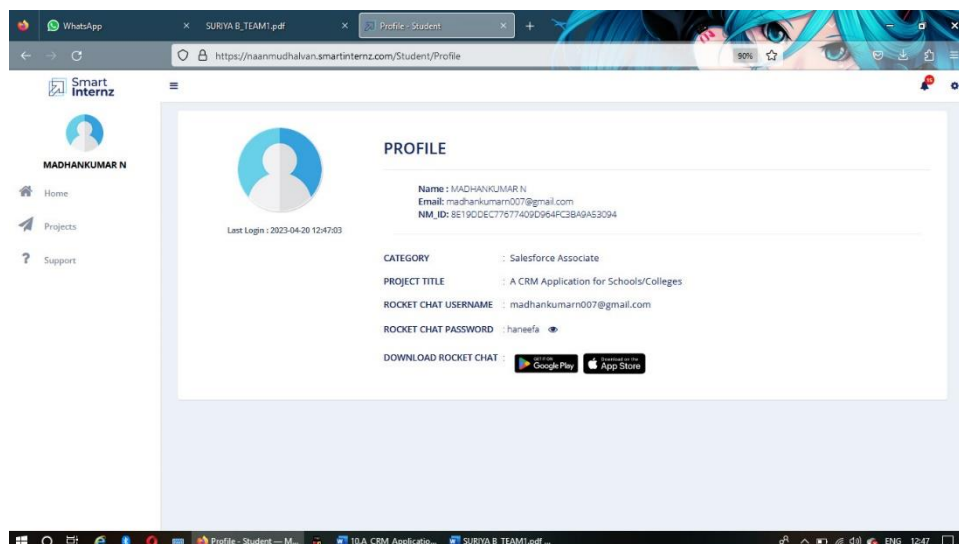
Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.

Salesforce

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.



Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Object Manager | Salesforce x - Student

https://naanmudhalvan.smartintenz.com/Student/guided_project_workspace/1979

Home Projects Support

Guided Project Project Workspace Chat with Mentor

Project Title : A CRM Application For Schools/Colleges
NM Id : BE19DCE77677409D964FC3BA9A3094
Industry Mentor(s) Name : Mentor-Salesforce

Project Progress 100%

GENERAL INSTRUCTION SHOW

Demo Link View Mentor Comments View Industry Mentor Comments

PROJECT DETAILS TASK & PROGRESS MENTOR REVIEW

A CRM Application For Schools/Colleges

- Create Salesforce Org
- Objects
- Lightning App
- Fields And Relationship
- Profile
- Users
- Permission Sets
- Reports

INTERMEDIATE

A CRM Application For Schools/Colleges

Category: Salesforce Associate

Skills Required:
Salesforce Admin

Project Description:
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 into their resume as well.

What you'll learn:
1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Role

Object Manager | Salesforce x Home | Salesforce

https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/SetupOne 110%

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

SETUP Home Create

Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started

Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More

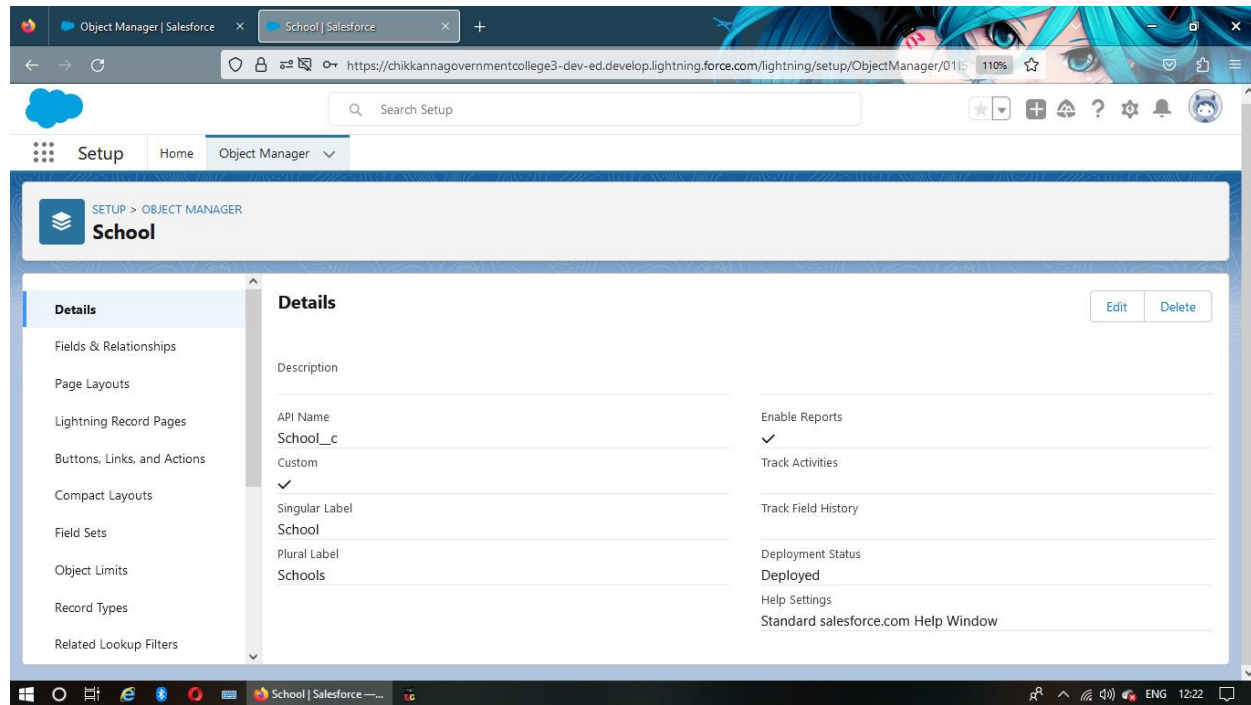
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started

Most Recently Used

Milestone-2:Object

Salesforce objects are **database tables that permit you to store data that is specific to an organization**. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Activity-1: Creation of School Object



Activity 2: Create student object

The screenshot displays the Salesforce Object Manager interface for a custom object named 'Student'. The browser address bar shows the URL: <https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01E...>. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Student__c
Custom	✓
Singular Label	Student
Plural Label	students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

Activity 3: Create parent object

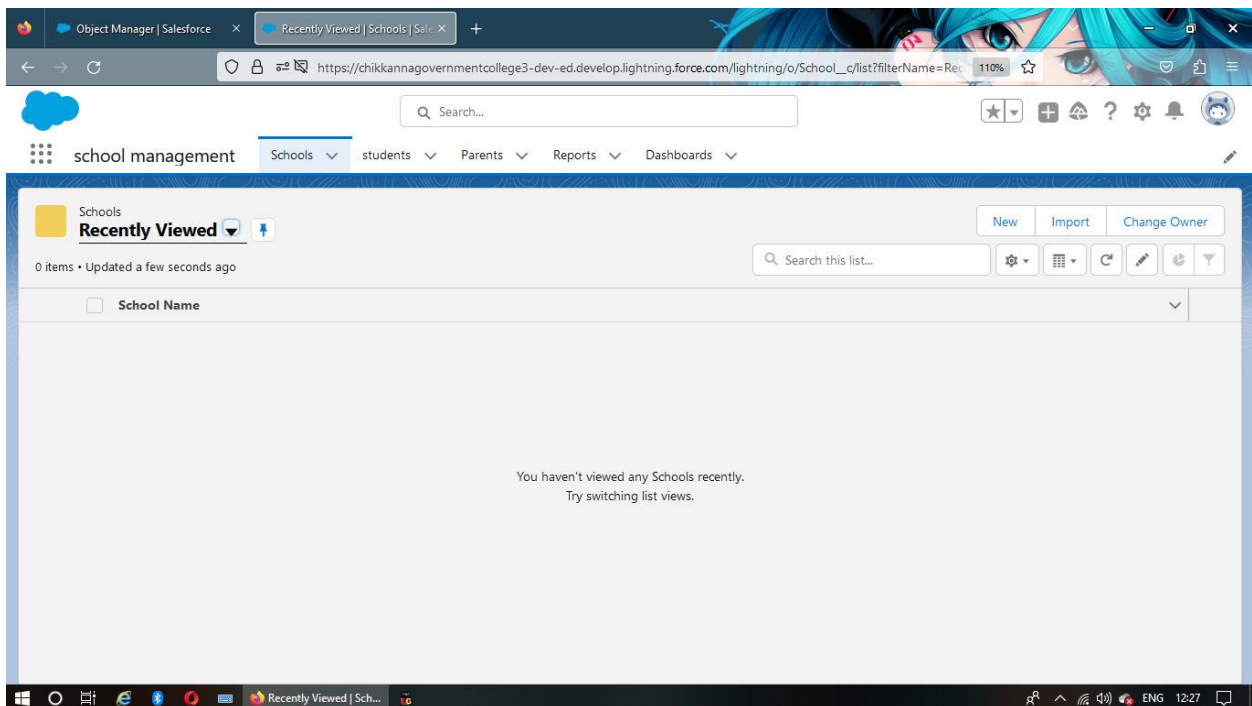
The screenshot displays the Salesforce Object Manager interface for a custom object named 'Parent'. The browser address bar shows the URL: <https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01E...>. The left sidebar contains the same navigation menu as in Activity 2. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Parent__c
Custom	✓
Singular Label	Parent
Plural Label	Parents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section. The bottom status bar shows the URL: <https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01E000002EXrG/FieldsAndRelationships/view>.

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. The simplest app usually has just two tabs



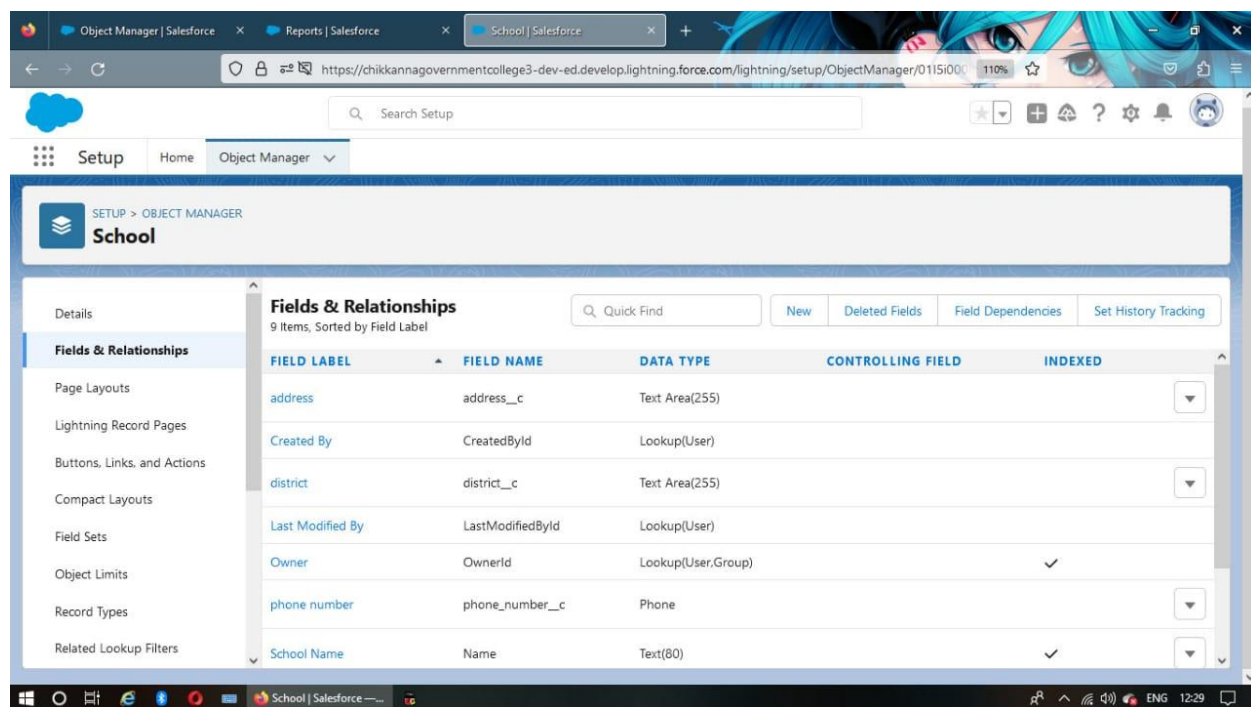
Milestone -4:Fields and Relationship

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:

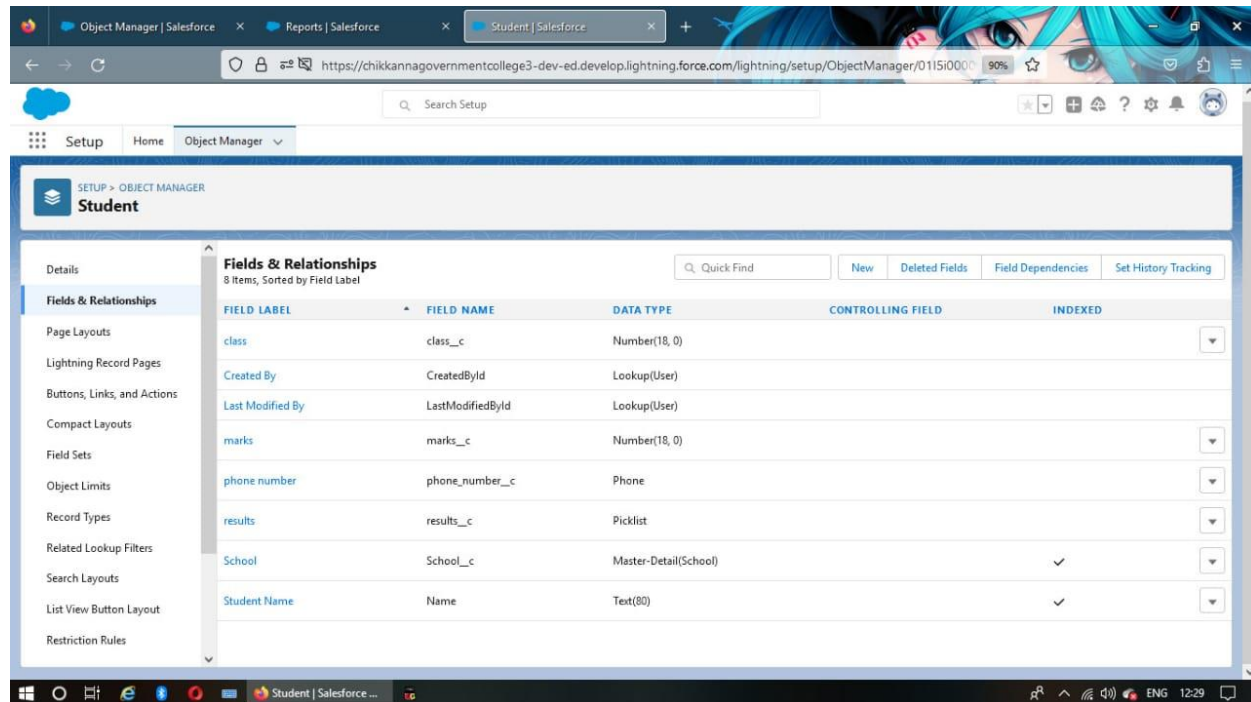


The screenshot displays the Salesforce Object Manager interface for the 'School' object. The 'Fields & Relationships' section is active, showing a list of 9 items sorted by Field Label. The table below represents the data shown in the interface.

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)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
phone number	phone_number__c	Phone		
School Name	Name	Text(80)		✓

Activity-2:

Creation of fields for the Student objects:

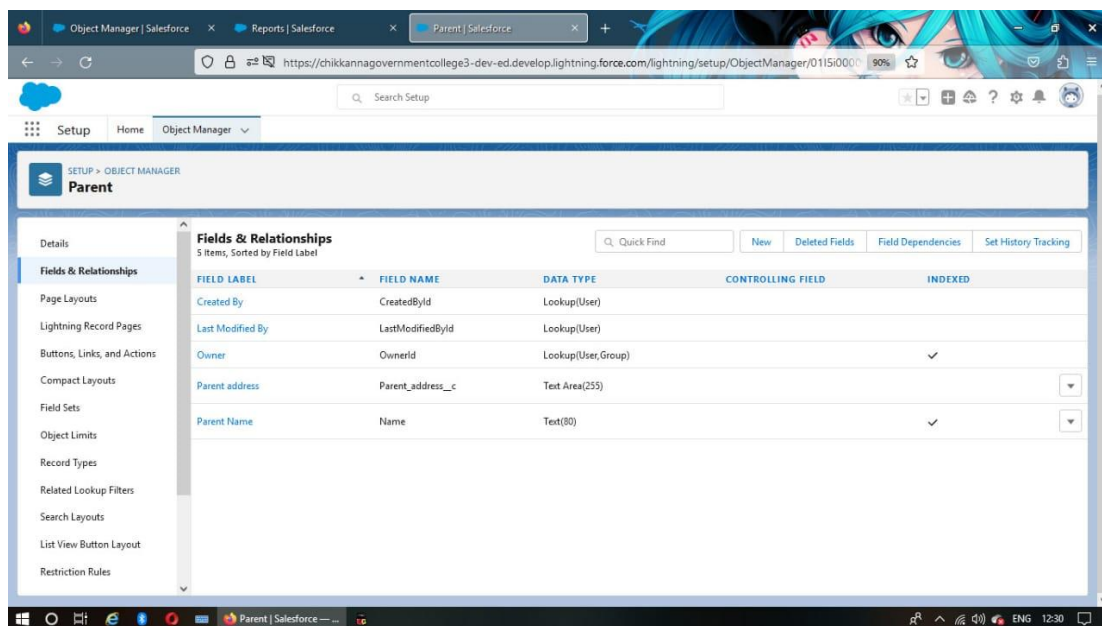


The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table with 8 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: class, Created By, Last Modified By, marks, phone number, results, School, and Student Name.

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		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Activity-3:

Creation of fields for the Parent objects:



The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a table with 5 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By, Last Modified By, Owner, Parent address, and Parent Name.

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)		✓

Milestone-5: Profile

A profile is a **group/collection of settings and permissions that define what a user can do insalesforce**. 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:

The screenshot shows the Salesforce 'Profiles' setup page in a web browser. The browser's address bar displays the URL: `https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?ad=...`. The page title is 'Profiles' under the 'SETUP' menu. The left sidebar shows the 'Profiles' link selected under the 'Users' section. The main content area is titled 'Edit View' and contains three steps:

- Step 1. Enter View Name:** The 'View Name' field is set to 'All Profiles'. It also shows 'Created By: Madhankumar N.' and 'Last Modified By: Madhankumar N.'.
- Step 2. Specify Filter Criteria:** This section includes a table with columns 'Setting', 'Operator', and 'Value'. The 'Operator' is set to 'equals'. Below the table, there are 'Add Row' and 'Clear All Rows' buttons. Examples provided are 'Modify All Data equals False' and 'Contact: Modify All equals True'.
- Step 3. Select Columns to Display:** This section allows selecting columns to show in the list view. It includes a search bar and two lists: 'Available Settings' (which is currently empty due to too many results) and 'Selected Settings' (which includes 'Profile Name', 'User License', and 'Custom').

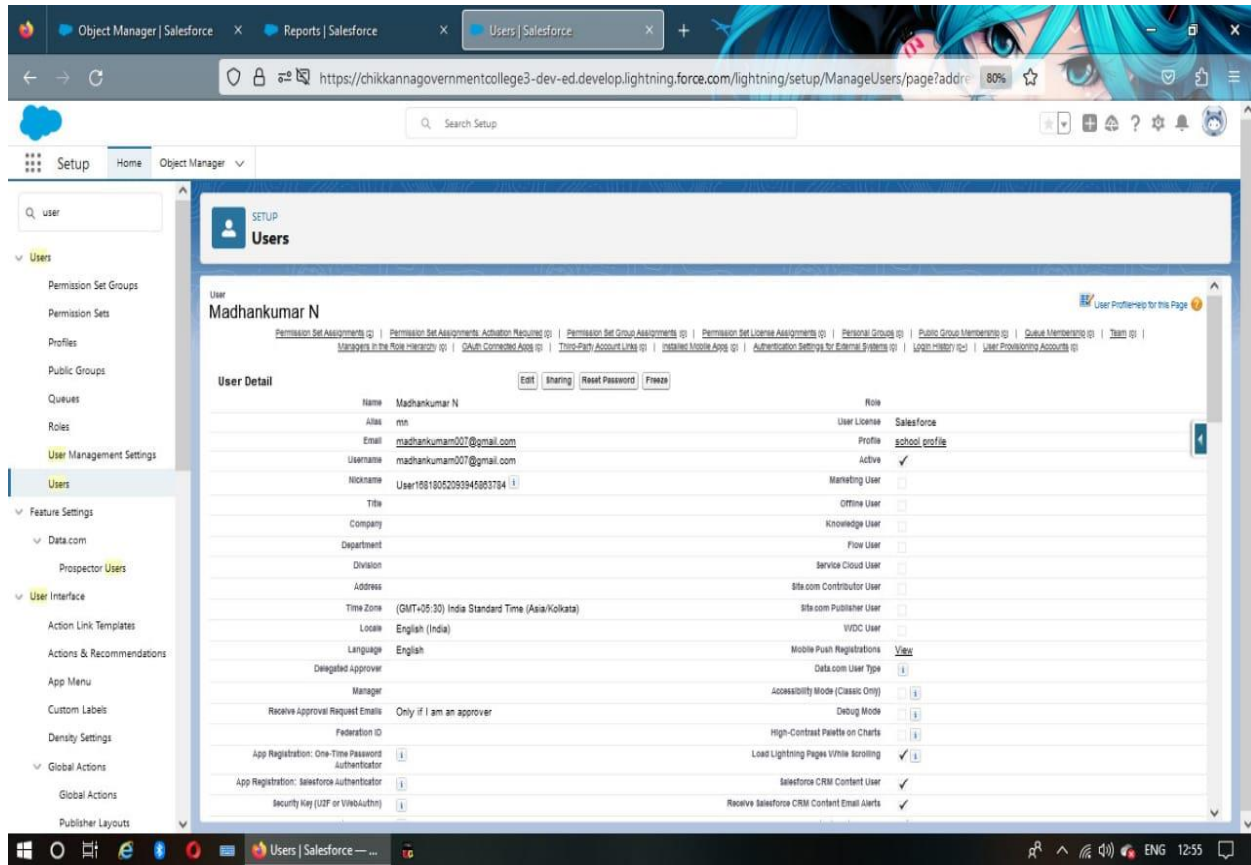
The bottom of the image shows the Windows taskbar with various application icons and the system clock indicating 12:31.

Milestone-6: Users

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

Activity:

Creating a Users:

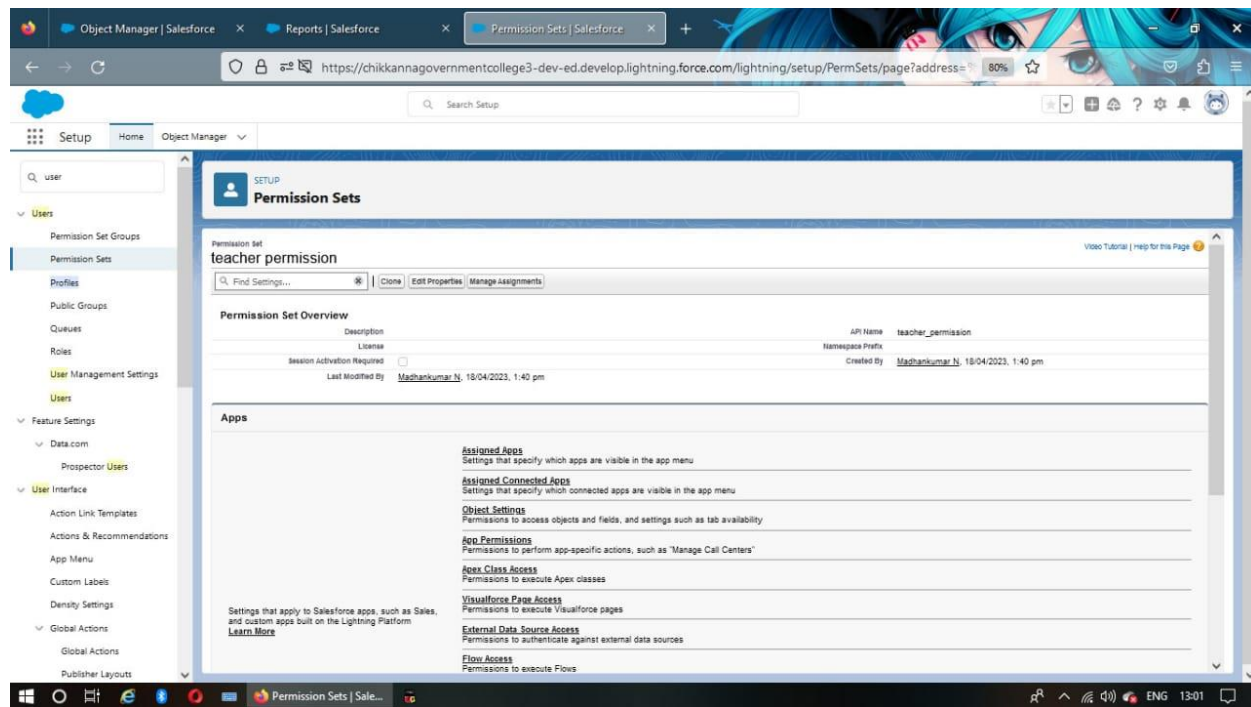


Milestone-7:Permission sets

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:



The screenshot displays the Salesforce 'Permission Sets' configuration page for a permission set named 'teacher permission'. The interface includes a left-hand navigation menu with options like 'Users', 'Permission Set Groups', 'Profiles', and 'User Interface'. The main content area shows the 'Permission Set Overview' for 'teacher permission', including details such as 'API Name: teacher_permission', 'Namespace Prefix', 'Created By: Madhankumar N.', and 'Last Modified By: Madhankumar N. 18/04/2023, 1:40 pm'. Below the overview, there are sections for 'Apps' and 'Permissions', which are currently collapsed. The 'Apps' section lists various settings like 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', and 'Flow Access'. The 'Permissions' section is also visible but not expanded. The bottom of the screen shows the Windows taskbar with the 'Permission Sets | Sale...' window active.

Activity-2:

Permission sets 2:

The screenshot shows the Salesforce Setup interface for a permission set named 'principal permission'. The browser address bar indicates the URL: <https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=>. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Permission Sets' and shows the 'principal permission' set. Below the title, there are buttons for 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments'. The 'Permission Set Overview' section displays the following details:

Field	Value
Description	
License	
API Name	principal_permission
Namespace Prefix	
Session Activation Required	<input type="checkbox"/>
Created By	Madhankumar N.
Created On	18/04/2023, 1:42 pm
Last Modified By	Madhankumar N.
Last Modified On	18/04/2023, 1:42 pm

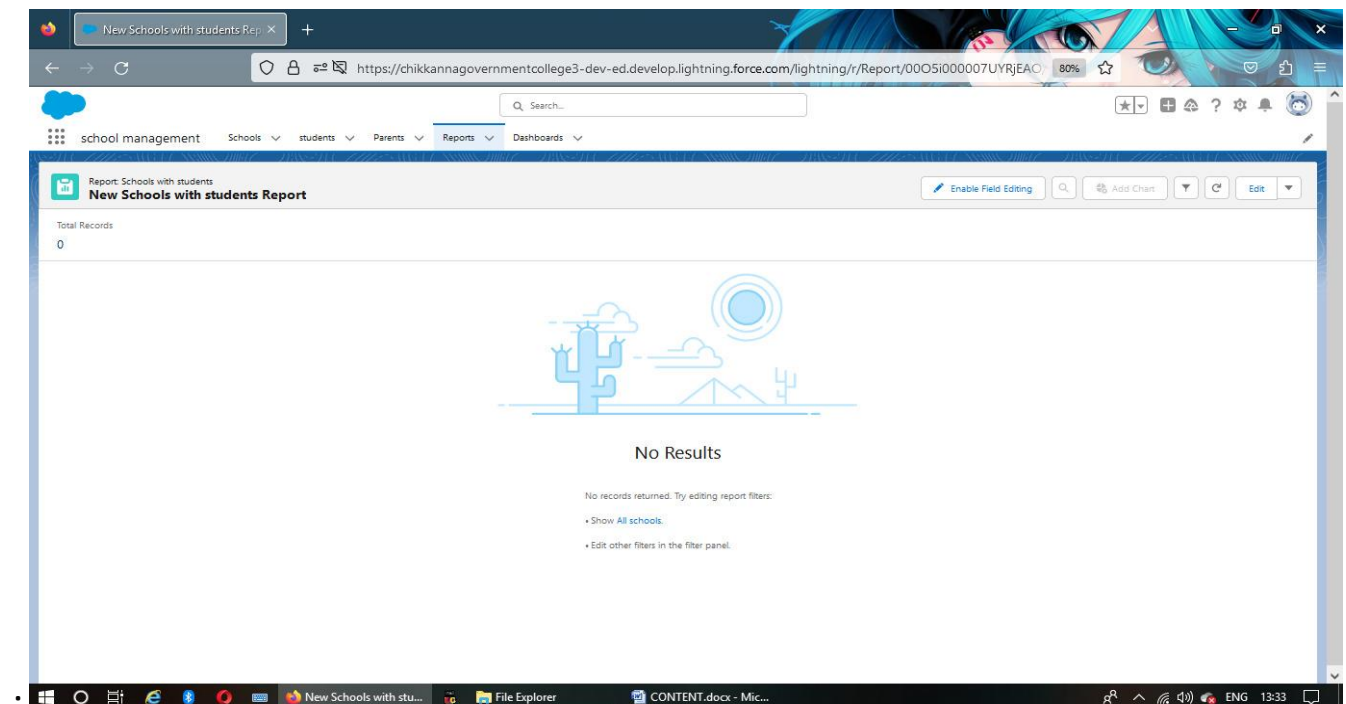
The 'Apps' section lists various permission categories:

- 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'.
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.
- External Data Source Access**: Permissions to authenticate against external data sources.
- Flow Access**: Permissions to execute Flows.

At the bottom, there is a note: 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform. [Learn More](#)'.

Milestone-8:Report

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.



CRM APPLICATION FOR SCHOOLS/COLLEGES

TRAILHEAD PROFILE PUBLIC URL :

TEAM LEADER: <https://trailblazer.me/id/madhankumar37>

TEAM MEMBER 1: <https://trailblazer.me/id/prabhu15>

TEAM MEMBER 2 : <https://trailblazer.me/id/palanivelpalanivel>

TEAM MEMBER 3: <https://trailblazer.me/id/maharajanbb11>

ADVANTAGES

- Improve Student Admissions Lifecycle. ...
- Track Student Life-Cycles Within the Institution. ...
- Keep Alumni Information Safe and Accessible. ...
- Stay Connected with Teams. ...
- Monitor Fee Payments and Reminders.

DISADVANTAGES:

- CRM costs. One of the greatest challenges to CRM implementation is cost. ...
- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. ...
- Poor communication. ...
- Lack of leadership.

APPLICATIONS:

- ❖ This article is for small business owners and marketers who want to learn about the benefits of CRM software for small businesses.
- ❖ CRM software is used to gather customer interactions in one central place to improve customer experience and satisfaction.
- ❖ CRM is one of the world's fastest-growing industries, expected to grow at a rate of 14% between 2021 and 2027.
- ❖ The benefits of CRM include better customer retention, increased sales and detailed analytics.

CONCLUSION:

Customer Relationship Management (CRM) is **a strategy that companies use to manage interactions with customers and potential customers.** CRM helps organisations streamline processes, build customer relationships, increase sales, improve customer service, and increase profitability.

FUTURE SCOPE:

Scope of salesforce in student admissions in schools and colleges need specific utility software to update with essential data.

It includes and manipulate large number data belongs to the students of various stages of studies.