

CHIKKANNA GOVERNMENT ARTS COLLEGE

TIRUPPUR - 641602

(AFFILIATED TO BHARATHIYAR UNIVERSITY)



BACHELOR OF SCIENCE IN PHYSICS

Naan Mudhalvan Project Title: **A CRM APPLICATION FOR
SCHOOLS/COLLEGES**

Submitted by

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NAAN MUDHALVAN PROJECT WORK

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. (PHYSICS) Degree NAAN MUDHALVAN PROJECT during the
year 2023

Submitted for the Naan Mudhalvan project work held

On 21.04.2023

MENTER

INDEX

S.NO.	CONTENTS	PAGE NO.
1	INTRODUCTION	04
2	MILESTONE 1 : CREATING DEVELOPER ACCOUNT	05
3	MILESTONE 2 : OBJECT	06
4	MILESTONE 3 : LIGHTNING APP	08
5	MILESTONE 4: FIELD AND RELATIONSHIP	10
6	MILESTONE 5: PROFILE	11
7	MILESTONE 6: USERS	13
8	MILESTONE 7: PERMISSION SETS	14
9	MILESTONE 8 : REPORT	15
10	CONCLUSION	17

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.

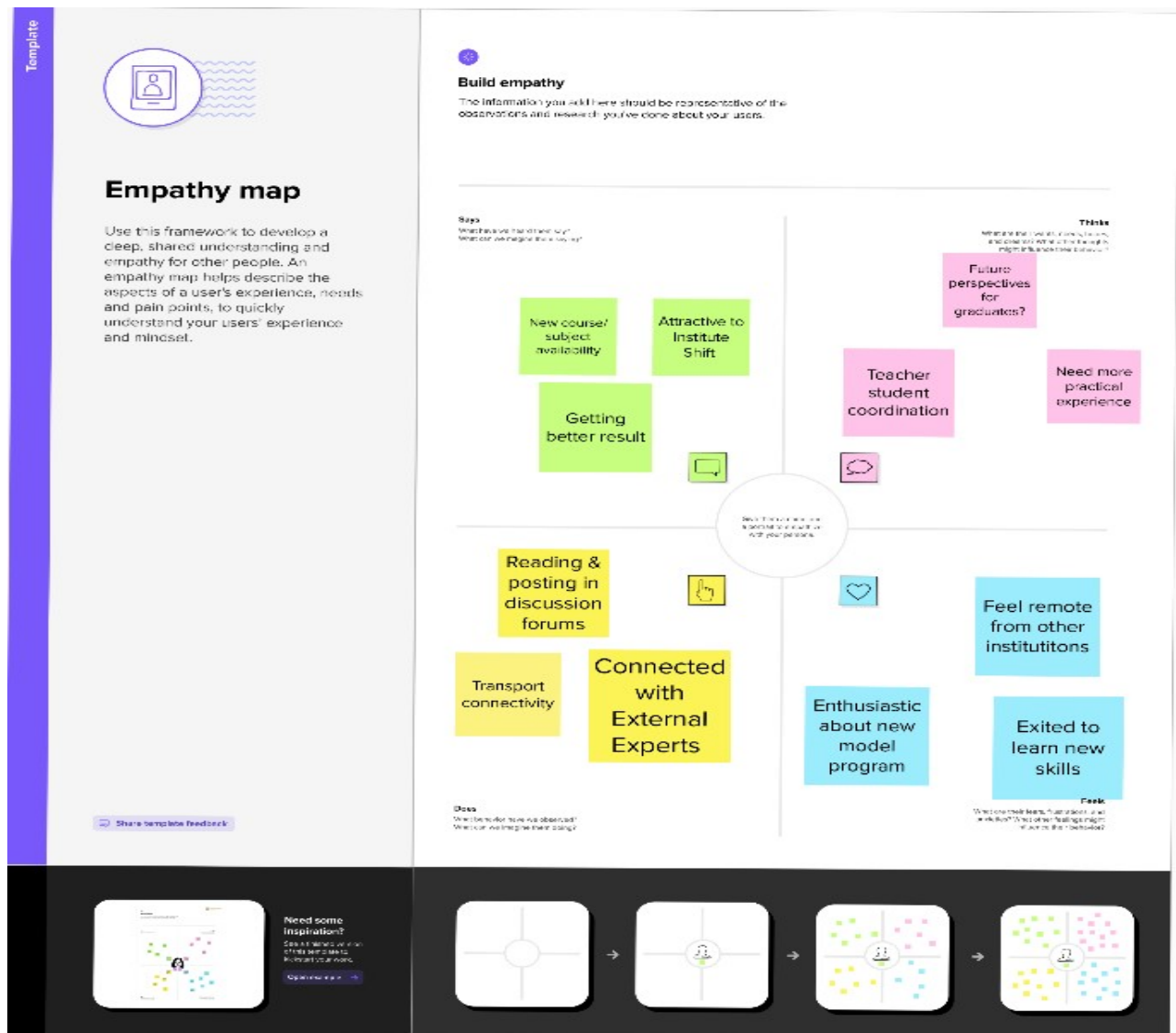
1.2 PURPOSE:

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

Brainstorming is a **group problem-solving method that involves the spontaneous contribution of creative ideas and solutions**. This technique requires intensive, freewheeling discussion in which every member of the group is encouraged to think aloud and suggest as many ideas as possible based on their diverse knowledge.

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 an smooth and productive session

- 🗣️ Stay in topic.
- 💡 Encourage wild ideas.
- ⏸️ Defer judgment.
- 👂 Listen to others.
- 🗣️ Go for volume.
- 👁️ 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

Increase courses	Encouragement for all students to propose	Attracting students at previous level

Maharajan M

Easy application process	Transparent selection system	Easy payment mode

Palanivel E

Financing schemes to fast payment	Offers for Enrolling new students	Increasing Extra-curricular courses

Prabhu P

More assessment	Lesser tuition fees	Various skill development 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:

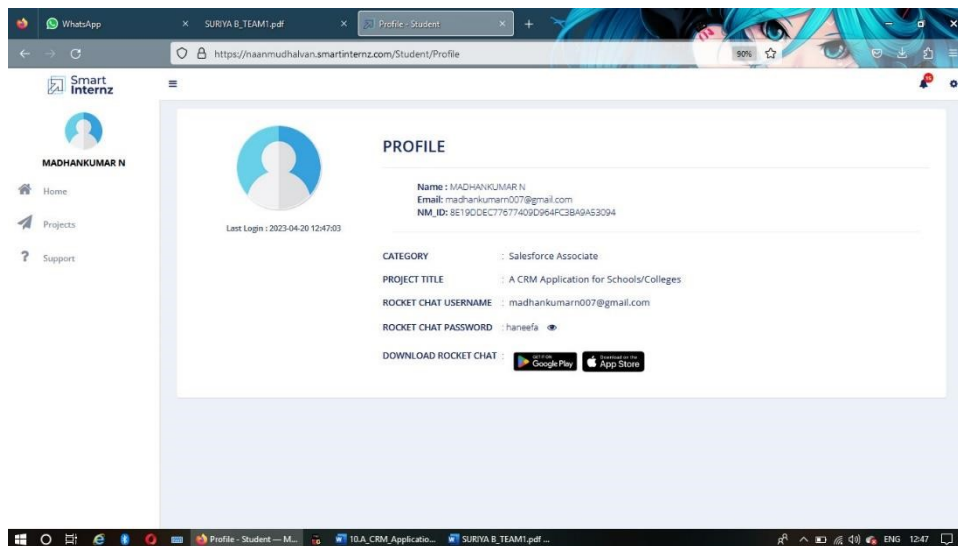
Introduction

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.

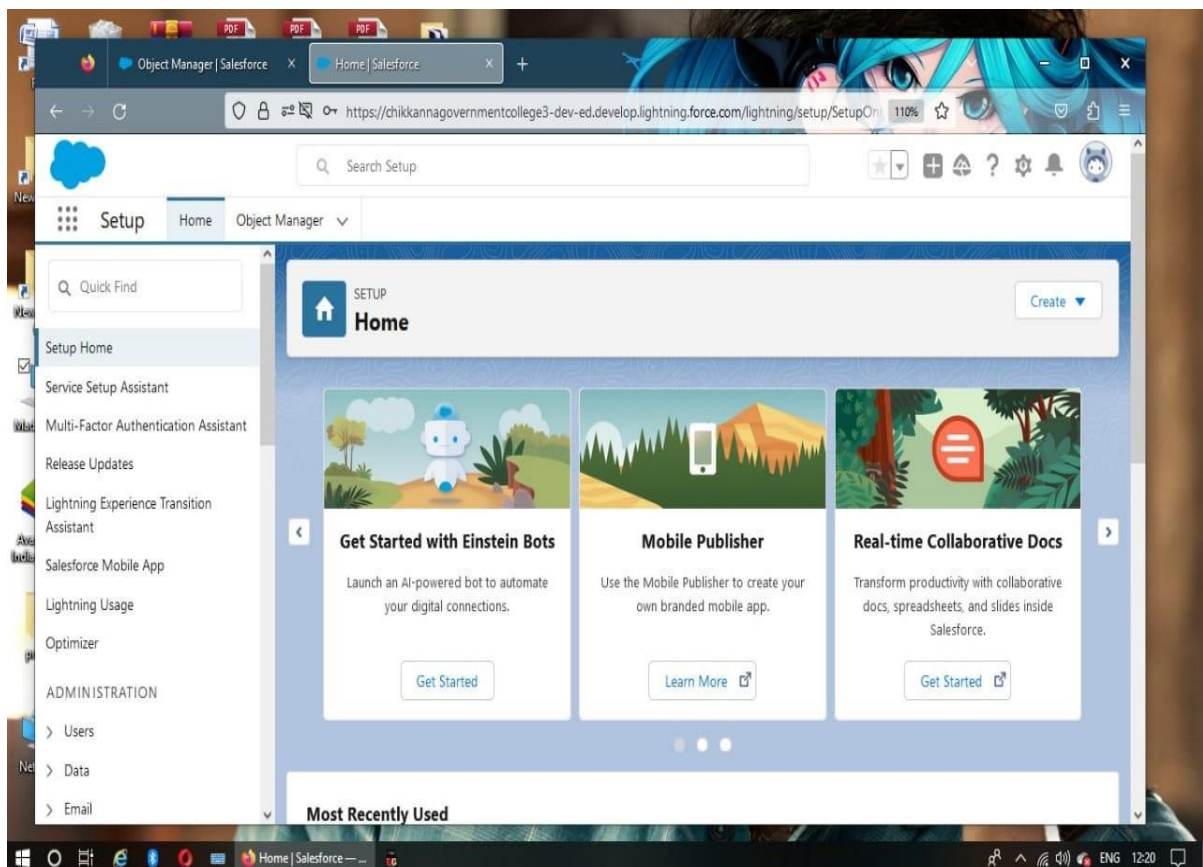
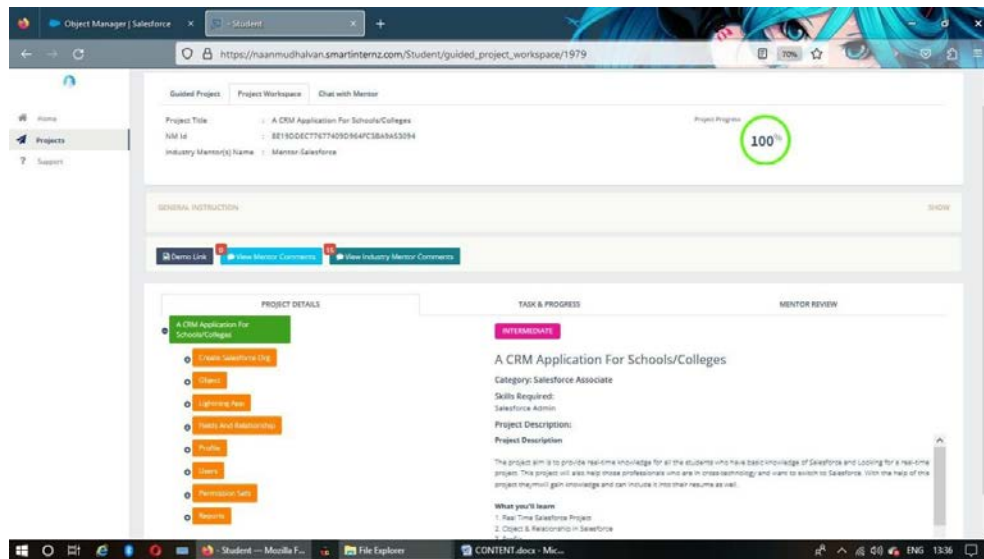
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.

Salesforce

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



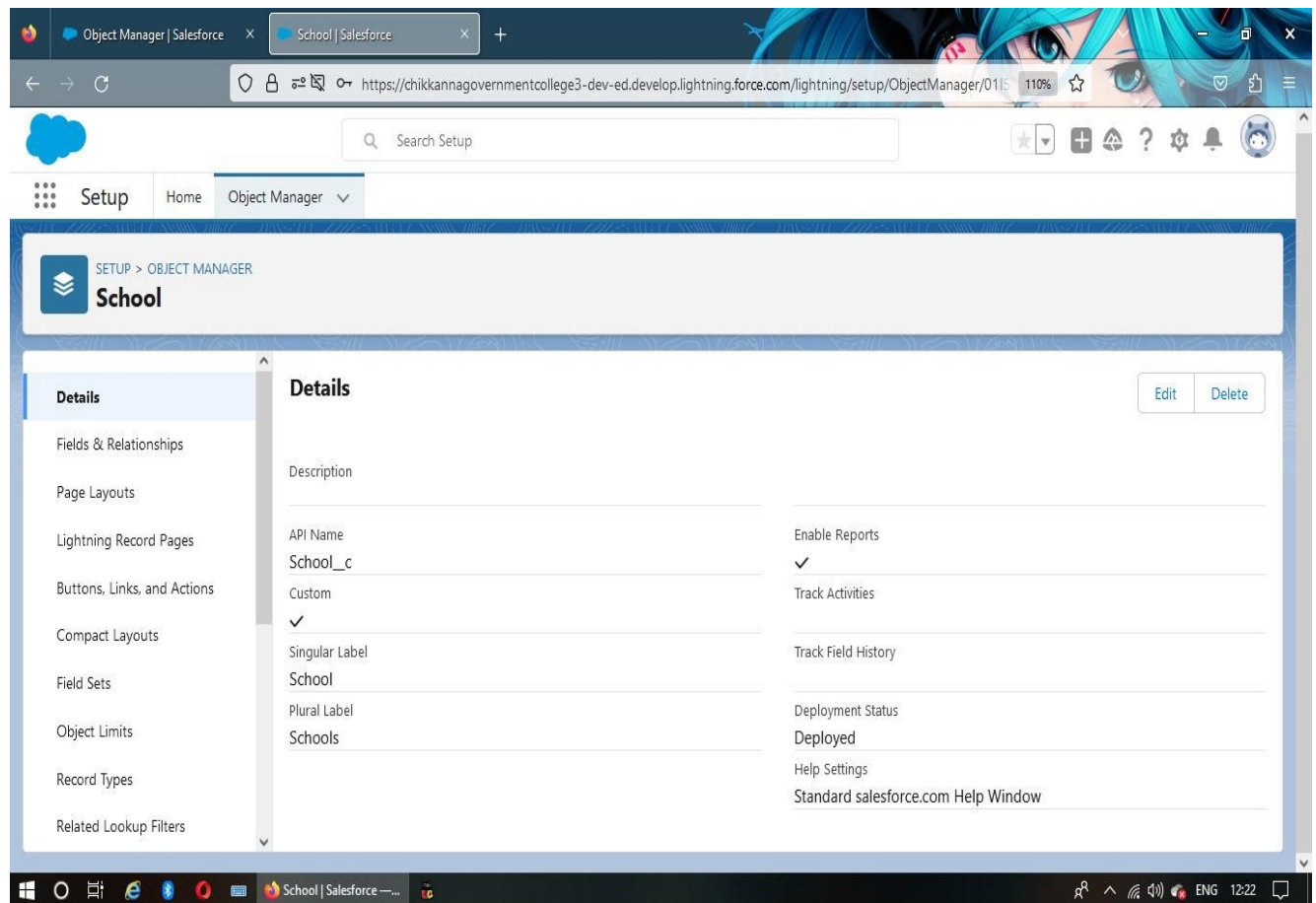
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



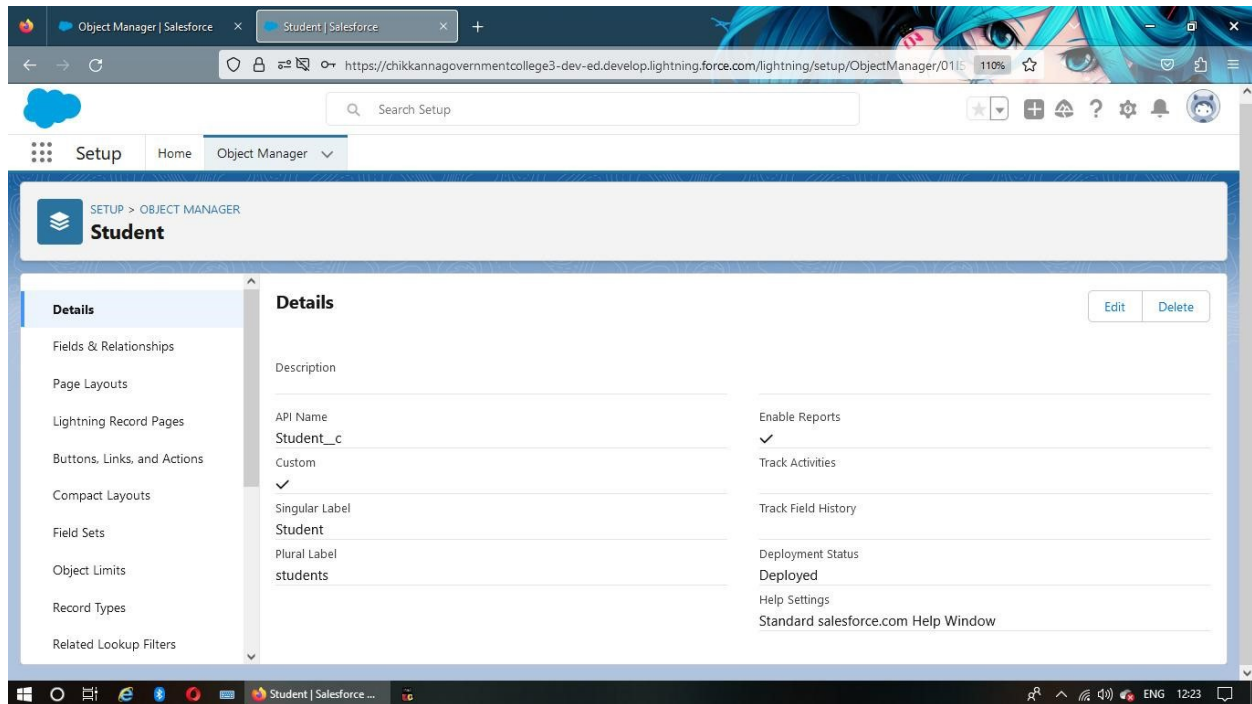
Milestone-2:Object

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

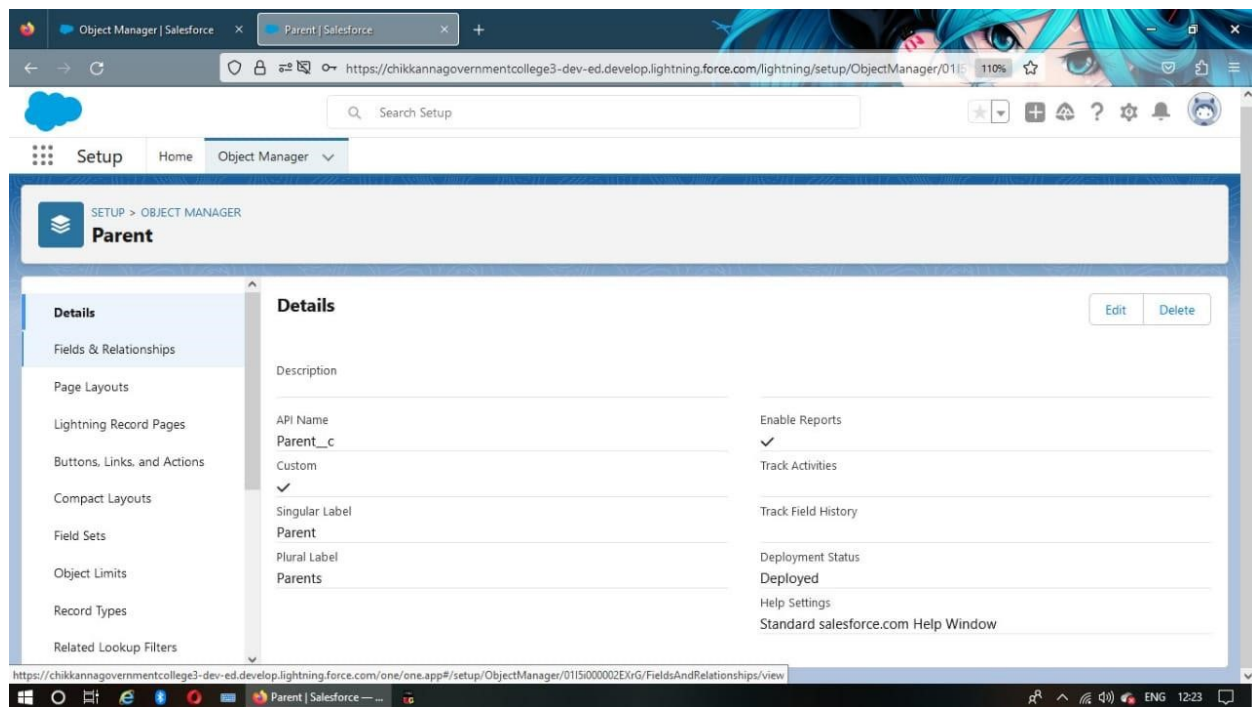


The screenshot shows the Salesforce Object Manager interface for a custom object named 'Student'. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active, displaying 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



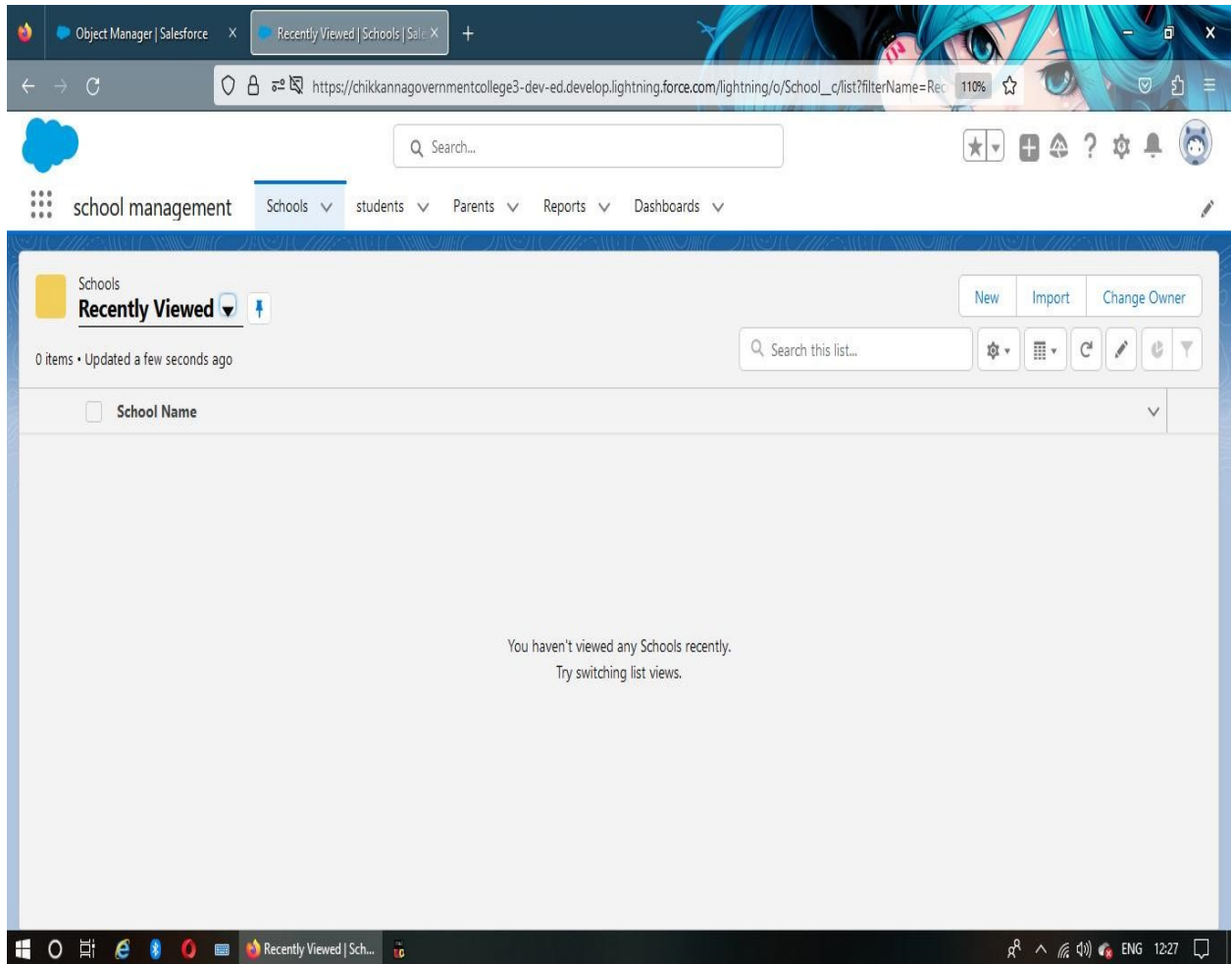
The screenshot shows the Salesforce Object Manager interface for a custom object named 'Parent'. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active, displaying 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.

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



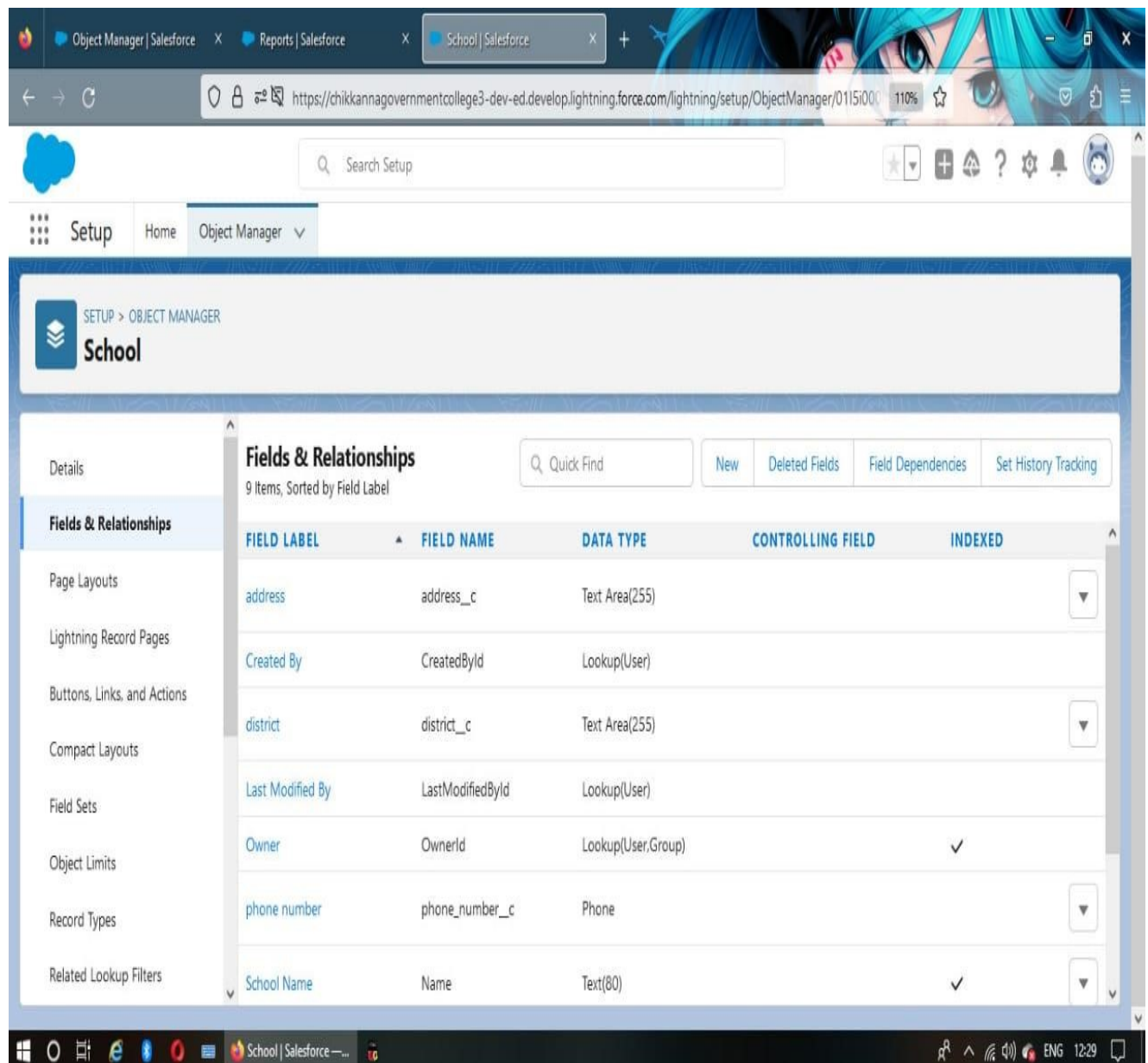
Milestone -4:Fields and Relationship

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 shows the Salesforce Object Manager interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: address (Text Area(255)), Created By (Lookup(User)), district (Text Area(255)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), phone number (Phone), and School Name (Text(80)).

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 of 8 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), marks (Number(18, 0)), phone number (Phone), results (Picklist), School (Master-Detail(School)), and Student Name (Text(80)).

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 of 5 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User, Group)), Parent address (Text Area(255)), and Parent Name (Text(80)).

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 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:

The screenshot shows the Salesforce Setup interface for creating a new profile. The browser tabs include 'Object Manager | Salesforce', 'Reports | Salesforce', and 'Profiles | Salesforce'. The address bar shows the URL: <https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?ad>. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area is titled 'Profiles' and 'Edit View'. It contains three steps: Step 1. Enter View Name, Step 2. Specify Filter Criteria, and Step 3. Select Columns to Display. Step 1 shows the 'View Name' as 'All Profiles', 'Created By' as 'Madhankumar N.', and 'Last Modified By' as 'Madhankumar N.'. Step 2 shows a table with columns 'Setting', 'Operator', and 'Value'. The 'Operator' is set to 'equals'. Step 3 shows a search for 'All' and a list of 'Available Settings' and 'Selected Settings'.

Object Manager | Salesforce x Reports | Salesforce x Profiles | Salesforce x +

Search Setup

Setup Home Object Manager

Search prof

Users

Profiles

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

SETUP Profiles

Profiles Edit View

Save Save As Delete Cancel

Step 1. Enter View Name Required information

View Name All Profiles

Created By Madhankumar N. 16/04/2023, 1:33 pm

Last Modified By Madhankumar N. 16/04/2023, 1:33 pm

Step 2. Specify Filter Criteria [Clear All Rows](#)

Setting	Operator	Value
	equals	

[Add Row](#)

Examples Modify All Data equals False
Contact: Modify All equals True

Step 3. Select Columns to Display

Specify the columns to show in the list view. To set the columns, you can add profile details, user permissions, and object-level permissions.

Search All Find

Available Settings
Too many to display, refine search criteria

Selected Settings
Profile Name
User License
Custom

Windows Taskbar: Profiles | Salesforce ...

Milestone-6: 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 Users:

The screenshot shows the Salesforce Setup interface for a user named Madhankumar N. The browser tabs at the top include 'Object Manager | Salesforce', 'Reports | Salesforce', and 'Users | Salesforce'. The address bar shows the URL: <https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=80%2F>. 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, Feature Settings, Data.com, Prospect Users, User Interface, Action Link Templates, Actions & Recommendations, App Menu, Custom Labels, Density Settings, Global Actions, and Publisher Layouts. The main content area is titled 'User: Madhankumar N' and includes a 'User Profile' link. Below the title is a navigation bar with links to various user management settings. The 'User Detail' section contains a table with user information and a list of roles.

User Detail	
Name	Madhankumar N
Alias	mnh
Email	madhankumam007@gmail.com
Username	madhankumam007@gmail.com
Nickname	User16918052090945083704
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	
Security Key (U2F or WebAuthn)	
Role	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: i
	Accessibility Mode (Classic Only): i
	Debug Mode: i
	High-Contrast Palette on Charts: i
	Load Lightning Pages V/White Scrolling: <input checked="" type="checkbox"/>
	Salesforce CRM Content User: <input checked="" type="checkbox"/>
	Receive Salesforce CRM Content Email Alerts: <input checked="" type="checkbox"/>

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 shows the Salesforce Setup interface for a Permission Set named 'teacher 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 links for Setup, Home, and Object Manager. The main content area displays the 'teacher permission' details, including a search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. The 'Permission Set Overview' section shows the API Name 'teacher_permission', Namespace Prefix, Session Activation Required checkbox, and creation/modification details. The 'Apps' section lists various permission categories: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, and Flow Access.

Permission Set Overview

Field	Value
Description	
API Name	teacher_permission
License	
Namespace Prefix	
Session Activation Required	<input type="checkbox"/>
Created By	Madhankumar N
Created Date	18/04/2023, 1:40 pm
Last Modified By	Madhankumar N
Last Modified Date	18/04/2023, 1:40 pm

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- 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

Activity-2:

Permission sets 2:

The screenshot shows the Salesforce 'Permission Sets' setup page. The browser address bar displays the URL: `https://chikkannagovernmentcollege3-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=`. The page title is 'Permission Sets'. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', 'Users', 'Permission Set Groups', 'Permission Sets', 'Feature Settings', 'Digital Experiences', 'Sales', 'Accounts', 'Salesforce Scheduler', 'Process Automation', and 'Migrate to Flow'. The main content area is titled 'principal permission' and includes a search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. Below this is the 'Permission Set Overview' section, which displays a table with the following details:

Description	API Name
principal_permission	principal_permission
License	Namespaced Prefix
Session Activation Required	Created By: Madhankumar N, 18/04/2023, 1:42 pm
Last Modified By: Madhankumar N, 18/04/2023, 1:42 pm	

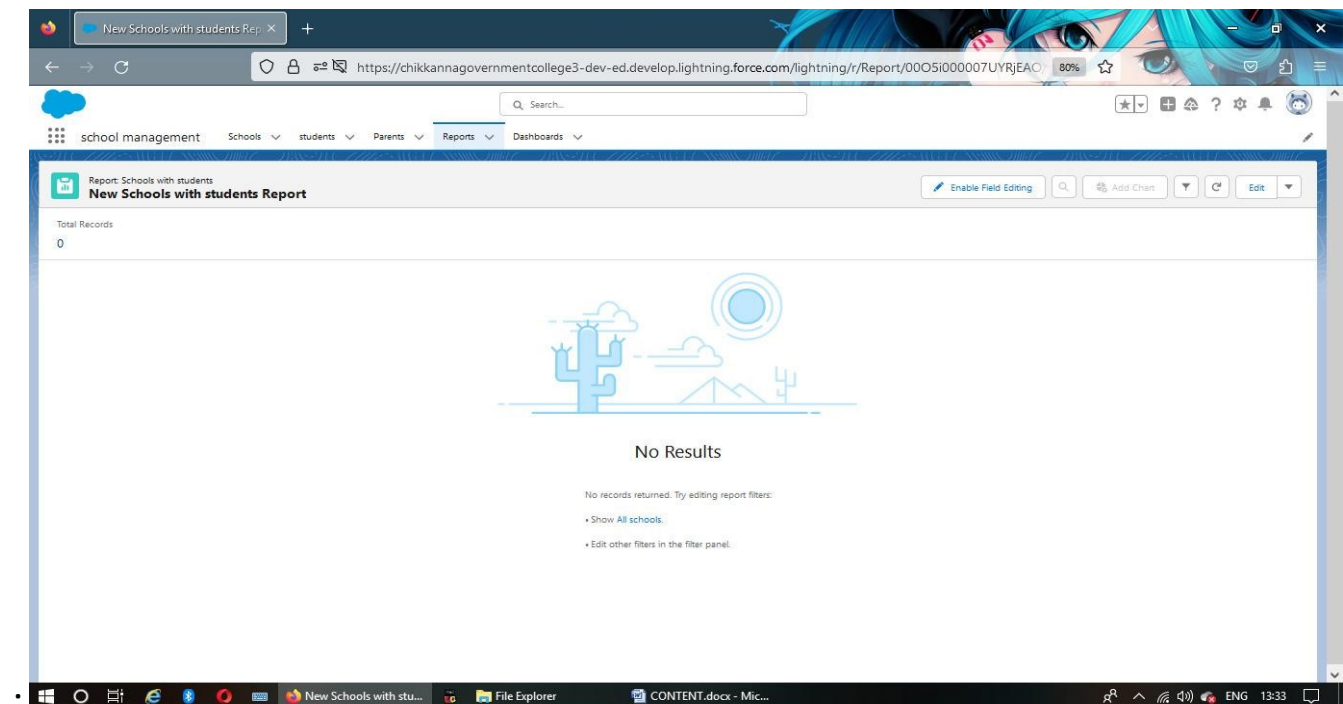
Below the overview, there is an 'Apps' section with links to various settings:

- [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 of the page, 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. ...

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 organizations streamline processes, build customer relationships, increase sales, improve customer service, and increase profitability.

In this project we have done **CRM APPLICATION FOR SCHOOL & COLLEGES**. It was completed successfully using the sales force platform. It has given us a full idea about sales force and its applications.

FUTURE SCOPE:

We plan to upgrade this developed **CRM APPLICATION FOR SCHOOL & COLLEGES** application with more features in the future so that it helps us to have more experience and also serves the user with more features.

[The future of CRM] is about which **companies will be able to pivot to meet the changing needs and trends — driven by customer expectations**. Customers expect organizations to know a lot about them and expect to have conversations.
