MUTHURANGAM GOVT. ARTS COLLEGE (AUTONOMOUS),

OTTERI ROAD, VELLORE – 02

Team ID   : NM2023TMID06313
Team Size   : 5
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A CRM APPILICATION FOR SCHOOLS / COLLEGES

Project Based Experimental Learning Program

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.

What we'll learn

1. Real Time Sales force Project
2. Object & Relationship in Sales force
3. Profile
4. Users
5. Reports
6.Permission sets
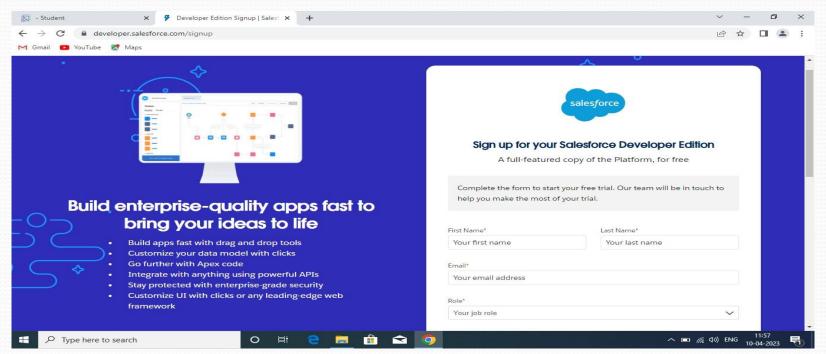7.Reports

Milestone-1:

Activity :Creating Developer Account
Creating Developer Account

Creating a developer org in sales force.
1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :

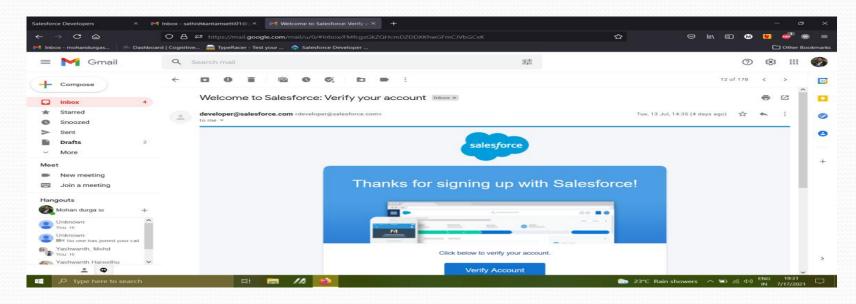a. First name & Last name

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
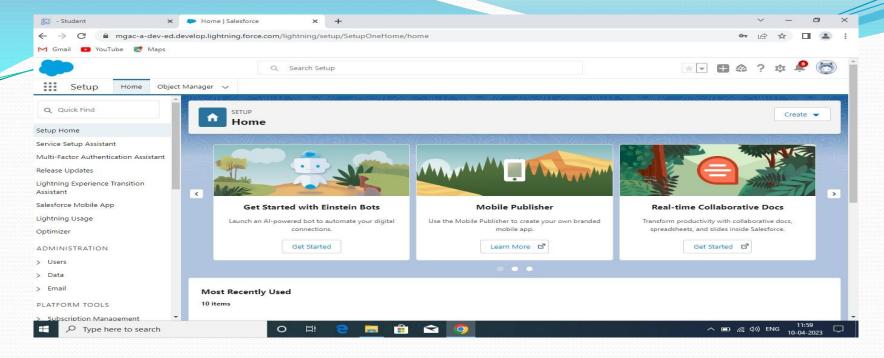
Click on sign up after filling these.

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
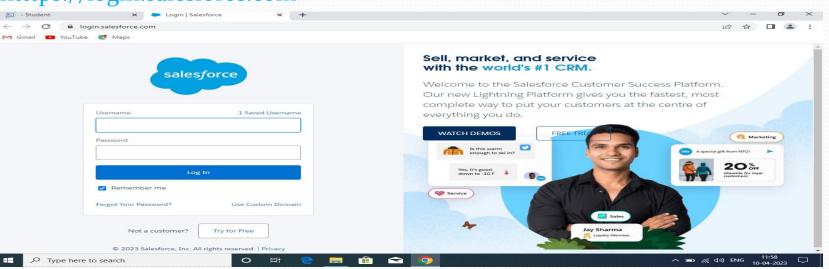

Login To Your Sales force Account

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.
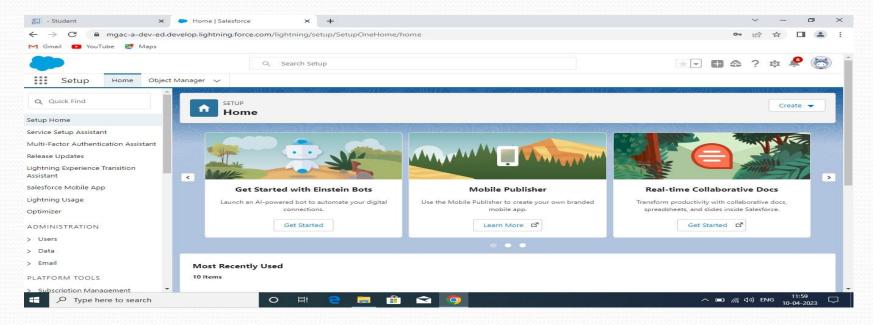
Sales force Login

htttps://login.salesforce.com

Milestone-2 : Object

Activity-1 : Creation of School Object
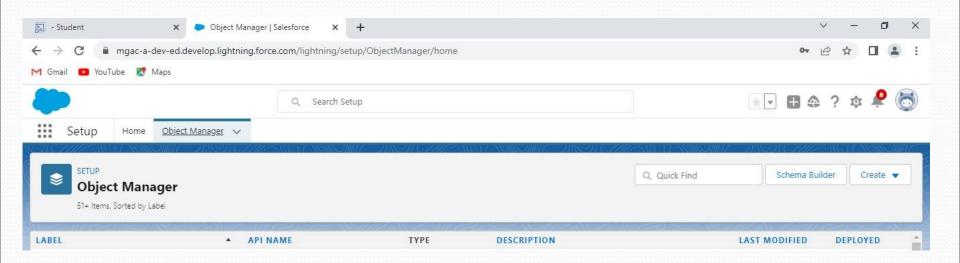### Creation of Objects for School Management :

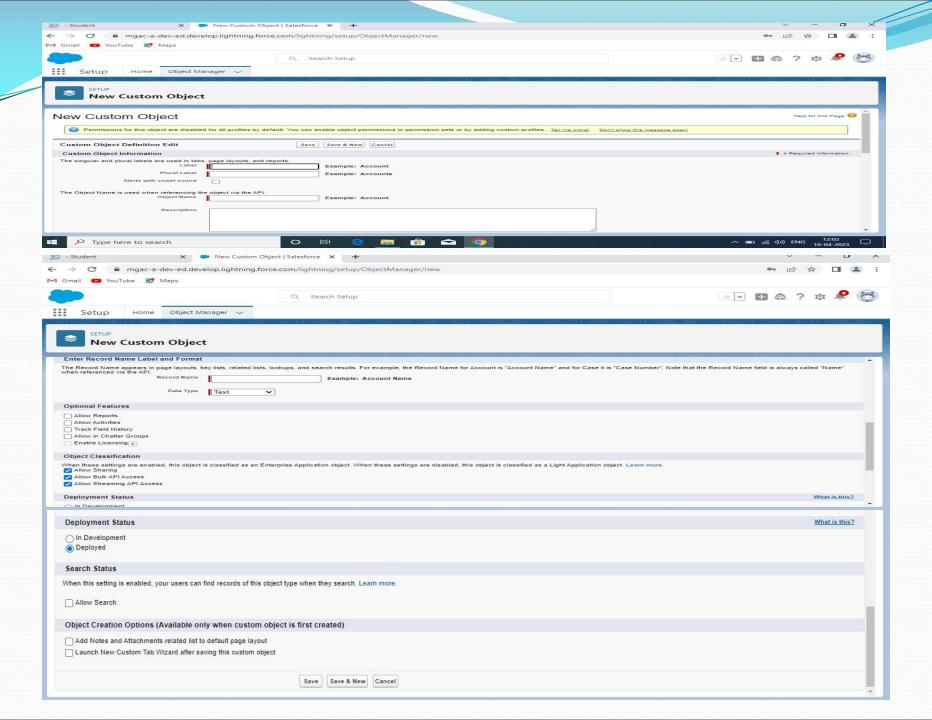For this school management we need to create 3 objects i.e., school, Parents and students.
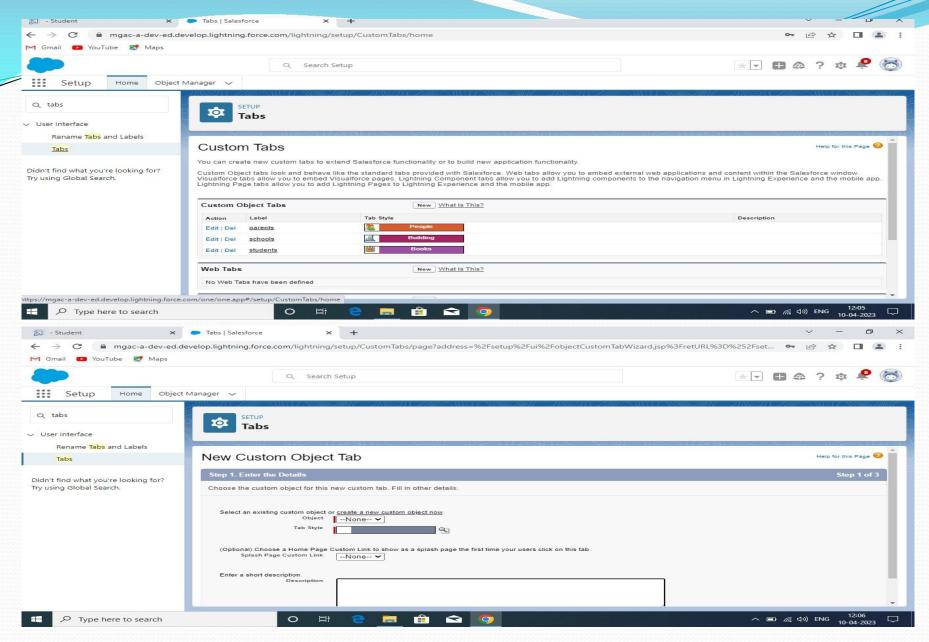
1. Click on the gear icon and then select Setup

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.
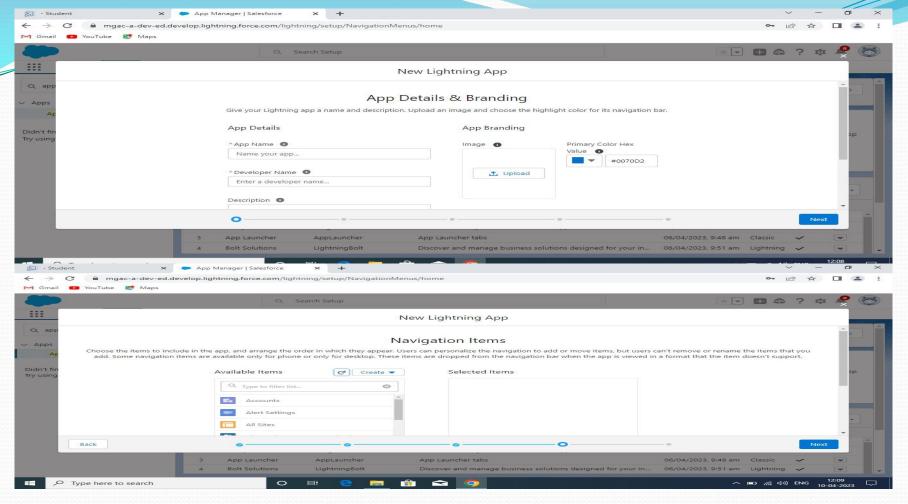
• Above school object steps are same for this student and parent object

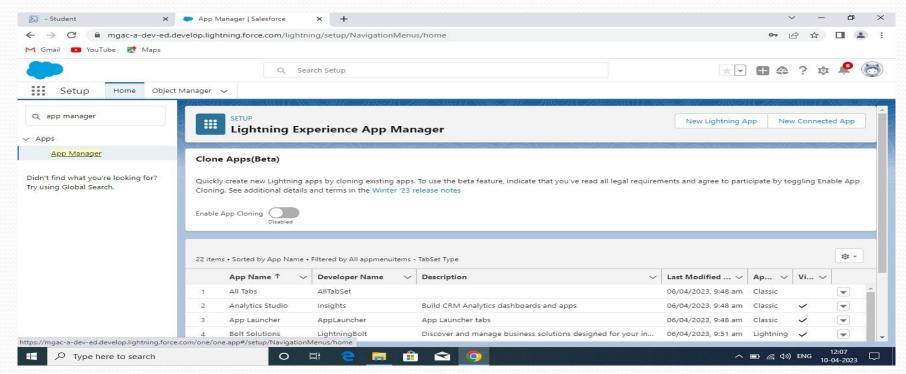**Milestone-3 : Lightning App**
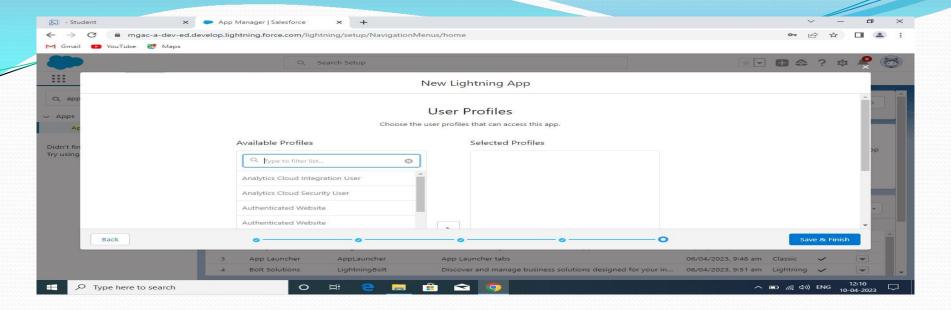
Activity :
Create the School Management app

• 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 Dashboard and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles Click Save & Finish.
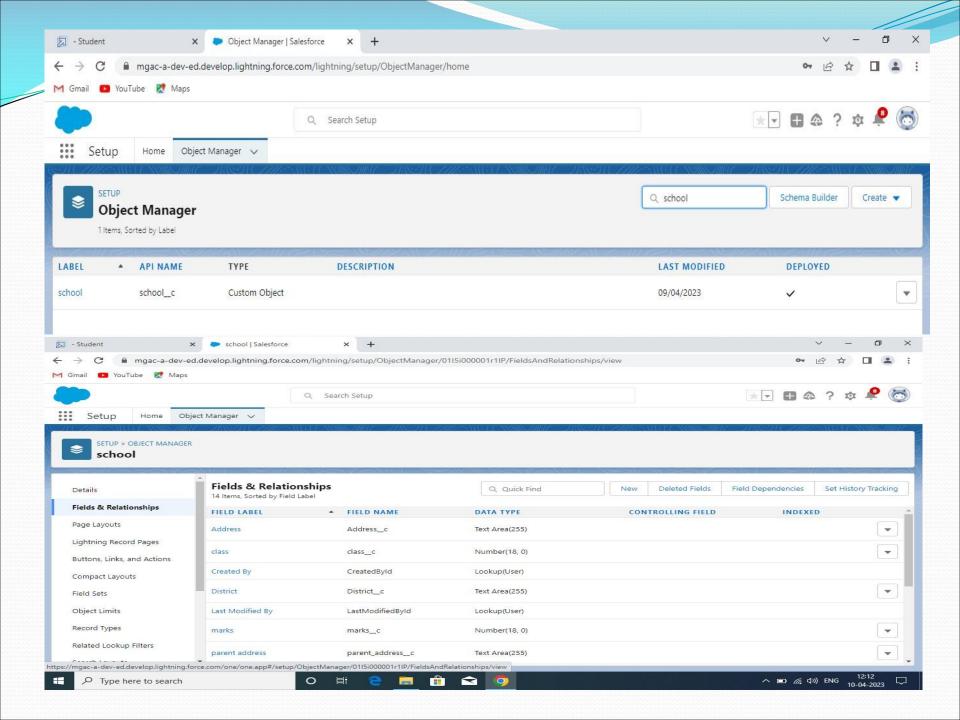
• To verify your changes, click the App Launcher, type School Management and select the School Management app.

Milestone -4 : Fields and Relationship

Activity-1 :
Creation of fields for the School objects :
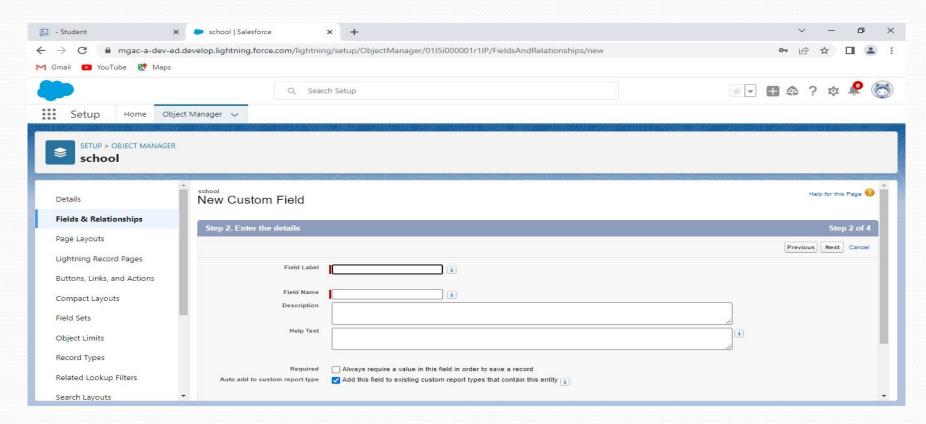
1 . click the gear icon and select Setup. This launches Setup in a new tab.
2 . Click the Object Manager tab next to Home
3 . Select School.
4 . Select Fields & Relationships from the left navigation, and click New

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.

• Above school object steps are same for this student and parent object

Milestone-5 : Profile
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
3. For Profile Name, enter School profile.
4. Click **Save**.
5. While still on the School profile page, then click **Edit**.
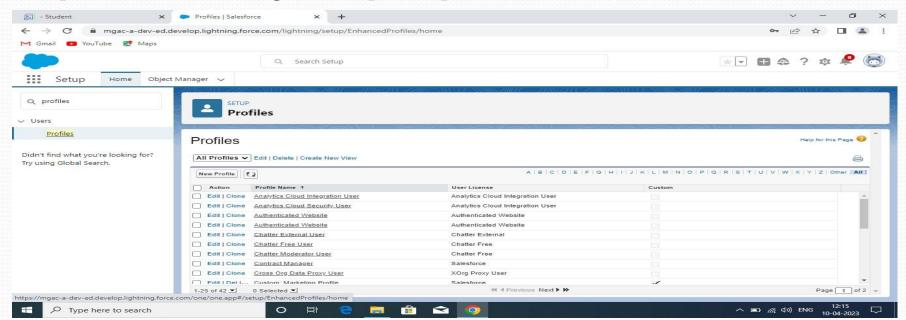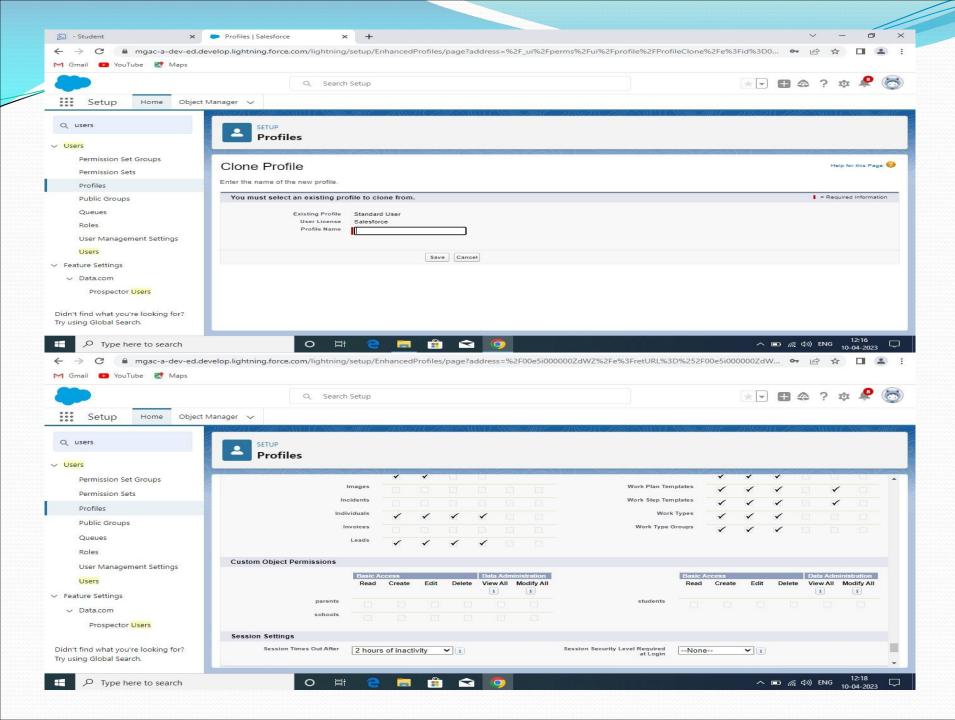6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

Search Setup

Setup | Home | Object Manager

🔍 users

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

Feature Settings
- Data.com
  - Prospector Users

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

SETUP
Profiles

Clone Profile

Enter the name of the new profile.

Help for this Page

You must select an existing profile to clone from.

| | = Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	[ ]

Save   Cancel

Type here to search

12:16
10-04-2023

Search Setup

Setup | Home | Object Manager

🔍 users

Users
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- Users

Feature Settings
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  - Prospector Users

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

SETUP
Profiles

Images	✓	✓	☐	☐	☐	☐		Work Plan Templates	✓	✓	✓	☐	☐
Incidents	☐	☐	☐	☐	☐	☐		Work Step Templates	✓	✓	✓	☐	✓
Individuals	✓	✓	✓	✓	☐	☐		Work Types	✓	✓	✓	☐	☐
Invoices	☐	☐	☐	☐	☐	☐		Work Type Groups	✓	✓	✓	☐	☐
Leads	✓	✓	✓	✓	☐	☐							

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
parents	☐	☐	☐	☐	☐	☐		students	☐	☐	☐	☐	☐	☐
schools	☐	☐	☐	☐	☐	☐								

Session Settings

| Session Times Out After | 2 hours of inactivity ▾ | Session Security Level Required at Login | --None-- ▾ |

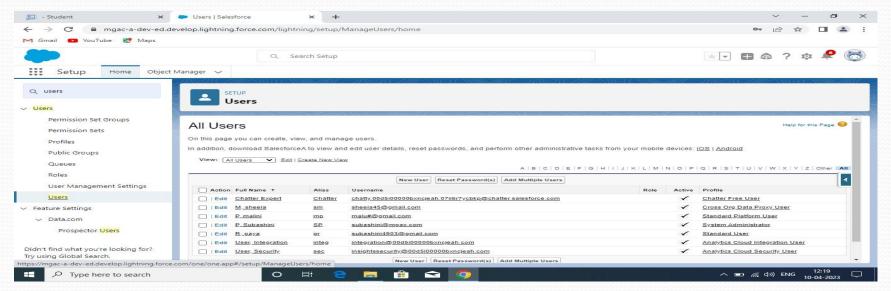Type here to search
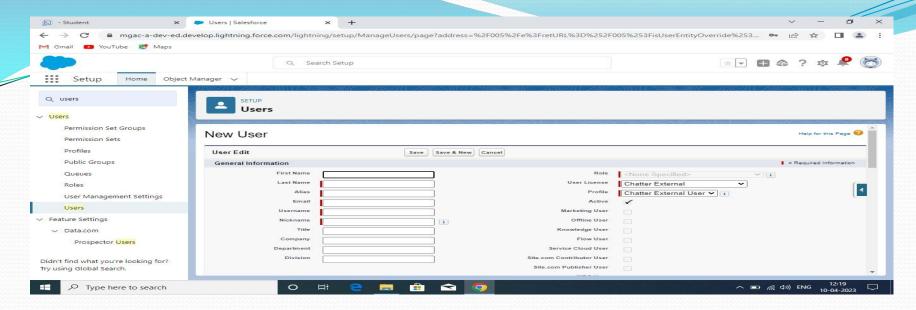
12:18
10-04-2023

Milestone-6 : Users

Activity :

Creating a Users :

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 sales force.

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.
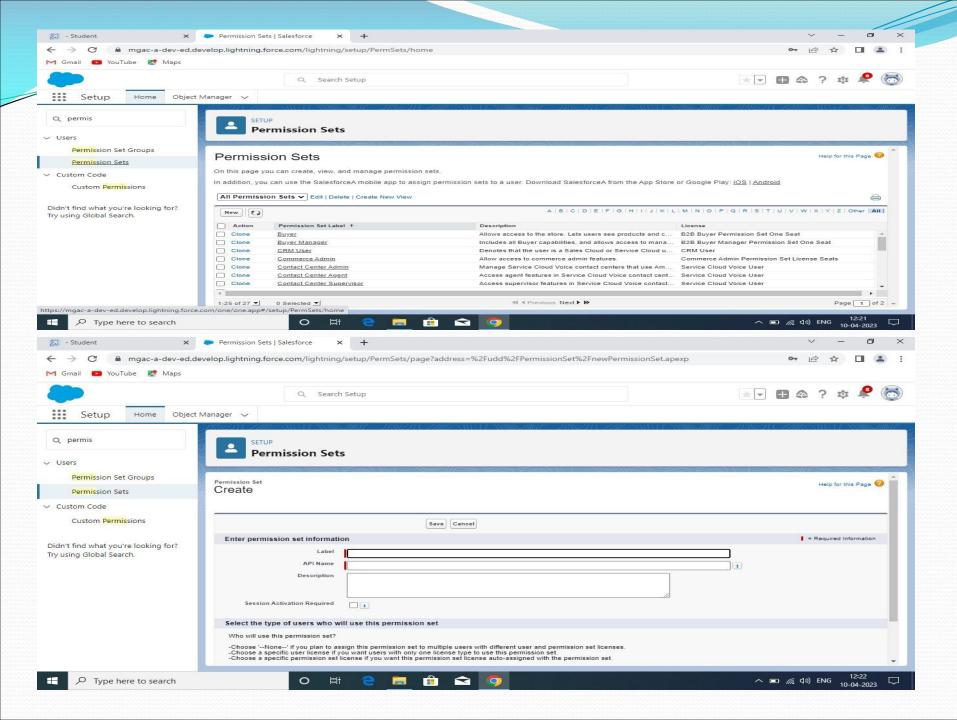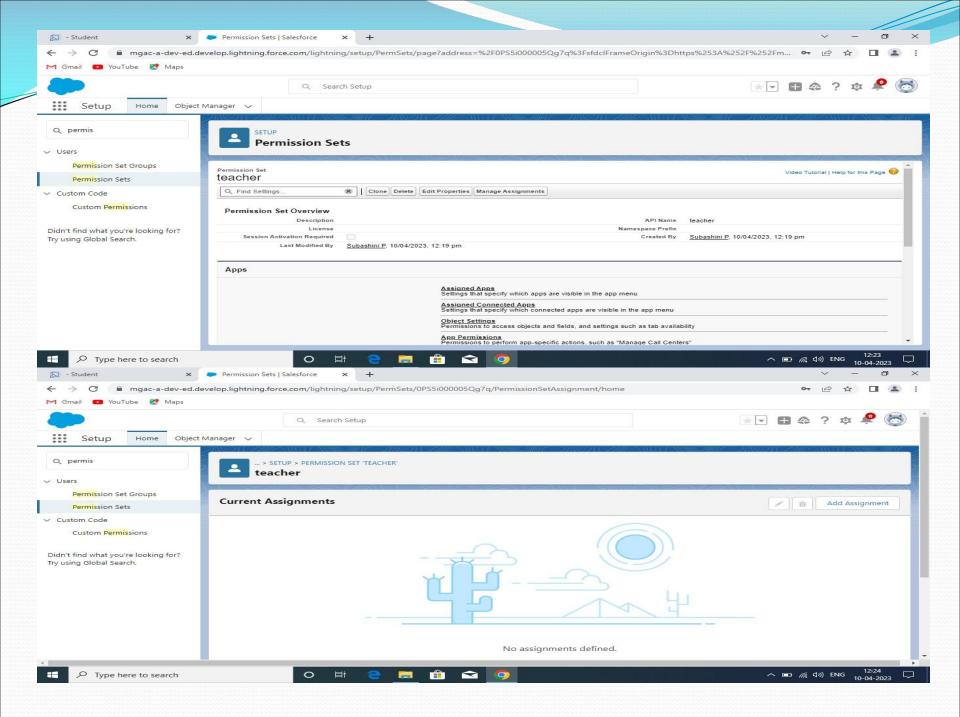
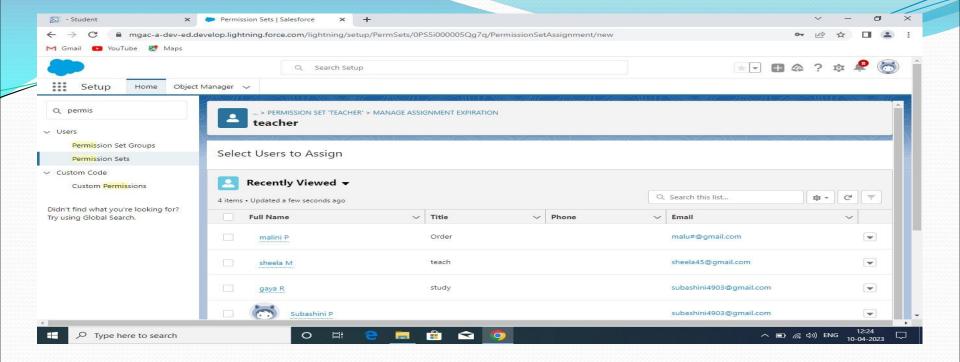**Milestone-7 : Permission sets**
Activity-1 :
Permission sets 1 :

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 the view create and edit permissions to all custom objects and assign
to the teacher user
• Similarly follow the above steps for the permission set 2.
• Give the name of the Permission set name as Principal permission.
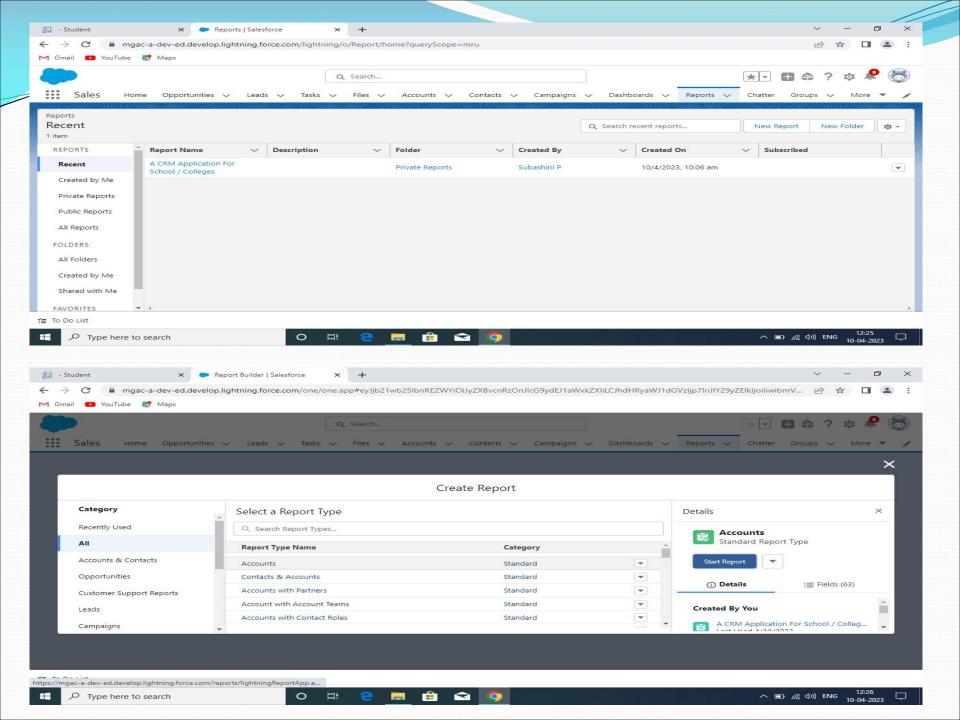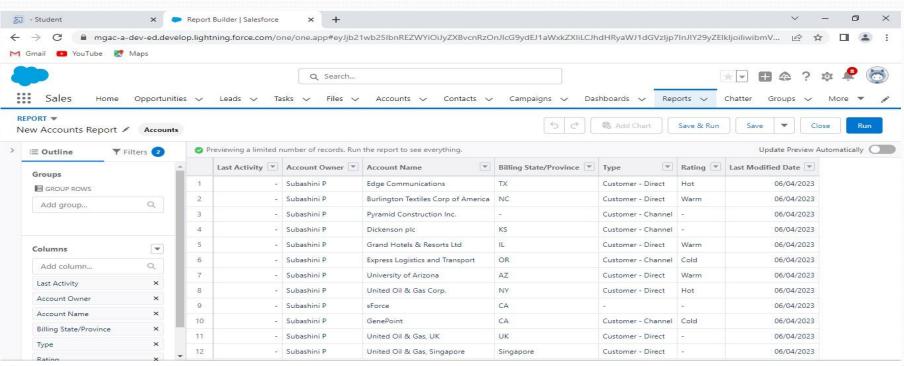
Milestone-8 : Reports

Activity :
Reports :

1. From the Reports tab, click New Report.
2. 2. Select the report type as School with students and parents for the report, and click Create.
3. Customize your report, then save or run it.