

**A CRM APPLICATION
FOR
SCHOOLS/COLLEGES**

SUBMITTED BY:

Team leader:

Anjanah. P

Team Members:

Aarthi. M

Aravind. S

Assi Nayaki. M

Benitta. M.P.

PROJECT REPORT TEMPLATE

1. INTRODUCTION:

1.1.OVERVIEW:

- The main aim of this project is to manage customer relationships, integrate with other systems and to build own applications.
- Salesforce is the customer success platform, designed to help sell, service, market, analyse and connect with the customer.
- CRM stands for “Customer Relationship Management”.
- Customers Relationship Management helps to manage the relationship with the customer.

1.2.PURPOSE:

- Salesforce helps business keep track of customer interaction and sales data.
- It can manage leads, contacts, opportunities and cases.
- Salesforce also offers several features to help businesses automate their sales and marketing process, such as email marketing, lead capture and lead scoring.
- It stores customer and prospect contact information, identify sales opportunities, record service issues and manage marketing campaigns.

2. PROBLEM DEFINITION AND DESIGN THINKING:

Problem Definition:

A problem statement is a concise description of the problem or issues a project seeks to address.

Design Thinking:

It is the structure and method of problem solving that involves five steps:

- Empathize
- Define
- Ideate
- Prototype
- Test

2.1.EMPATHY MAP:

An empathy map is a collaborative tool teams can use to gain a deeper insight into their customers. It consists of four quadrants. The four Quadrants reflect our key traits, which the user demonstrated/possessed during the observation/research stage. The four quadrants refer to what the user says, does, think and feel. It's fairly easy to determine what the user say and did.



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



Build empathy

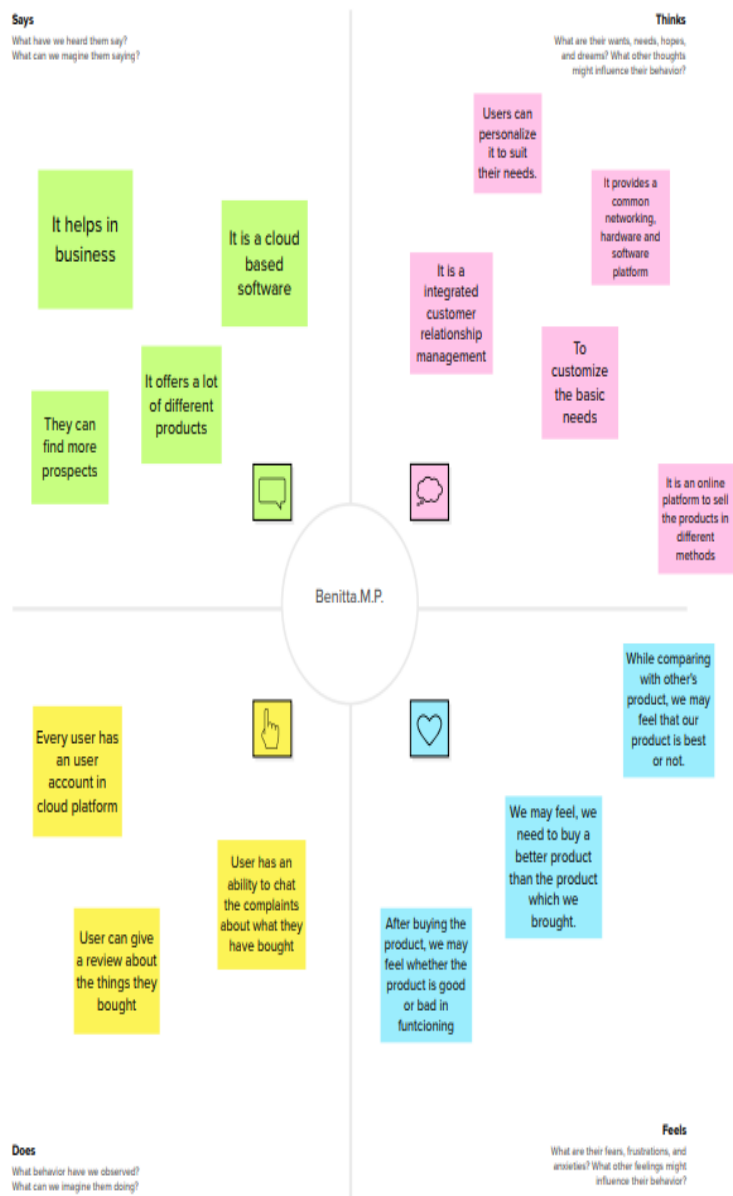
The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

Thinks

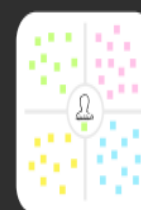
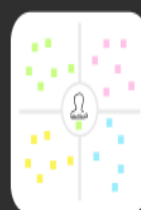
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?



Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#) →



2.2. IDEATION AND BRAINSTORMING MAP:

Paste the ideation and brainstorming map screenshot.

Brainstorm & idea prioritization

Use the template in your own brainstorming sessions so your team can share their imagination and start shaping concepts even if you're not sitting in the same room.

- 10 minutes to prepare
- 1 hour to collaborate
- 2-3 people recommended

Before you collaborate

A list of preparation goes a long way with this session. Here's what you need to do to get going.

- Team gathering: Invite everyone to the session and send out links. Share background information or pre-work ahead.
- Set the goal: This sets the problem you'll be looking to solving in the brainstorming session.
- Look for ways to facilitate work: Look for ways to help everyone have a happy and productive session.

Define your problem statement

What problem are you trying to solve? Frame your problem in a way that is clear and concise. This will set the focus of your brainstorm.

10 minutes

Issue

Manage school record using CRM

Key rules of brainstorming

There is no bad idea and production matters

- Step 1: topic
- Step 2: judgment
- Step 3: volume
- Step 4: possible to build

Group ideas

Take turns sharing your ideas with listening partner or related notes as you go. Once all ideas are shared, group them into clusters. It's okay if a cluster is bigger than the others. You can always go back and refine your ideas.

10 minutes

10 minutes to prepare

1 hour to collaborate

2-3 people recommended

Prioritize

Your team should all be on the same page about what's important. Working together, rank your ideas on this grid to determine which ideas are important and which are not.

20 minutes

The brainstorming map is a grid with 'Importance' on the vertical axis and 'Feasibility' on the horizontal axis. Ideas are placed in yellow boxes across the grid. A curved line separates the top-right quadrant (high importance, high feasibility) from the other three quadrants. Ideas in the top-right quadrant include: 'Team members in the project should work with sincerity and dignity', 'Communicate openly with the team', 'Maintain correct schedule for the task and the project', and 'Have a road map of the team's goals'. Ideas in the other quadrants include: 'Always keep a pre plan while doing a project', 'Team members should work with sincerity and dignity', 'Each team member is valued for their unique talents and skills', 'Employees work closely together and contribute overall quality and success of the project', 'Working in a group sharing knowledge and understanding how different employees perform', 'All the members in the team should cooperate', 'Unity is the main thing in the team work', 'Team members should give the ideas about the topic', 'Team members should undergo good decision making processes', and 'Each member has their own work to do and can take responsibility for all tasks'.

A mobile app mockup showing the brainstorming map on a smartphone screen. The app has a dark background with yellow text and icons. The title 'Manage school record using CRM' is at the top. Below it, there are several yellow boxes containing the same ideas as the brainstorming map. The app also has a navigation bar at the bottom with icons for 'Home', 'Add', 'Edit', and 'Delete'.

3.RESULT:

3.1. DATA MODEL:

Object Name	Fields in the object						
Object:1	<table><tr><th>Field Label</th><th>Data type</th></tr><tr><td>School</td><td>Text Area</td></tr><tr><td>Student</td><td>Picklist</td></tr></table>	Field Label	Data type	School	Text Area	Student	Picklist
Field Label	Data type						
School	Text Area						
Student	Picklist						
Object:2	<table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Parents</td><td>Text Area</td></tr><tr><td>Student</td><td>Master-detail relationship</td></tr></table>	Field label	Data type	Parents	Text Area	Student	Master-detail relationship
Field label	Data type						
Parents	Text Area						
Student	Master-detail relationship						

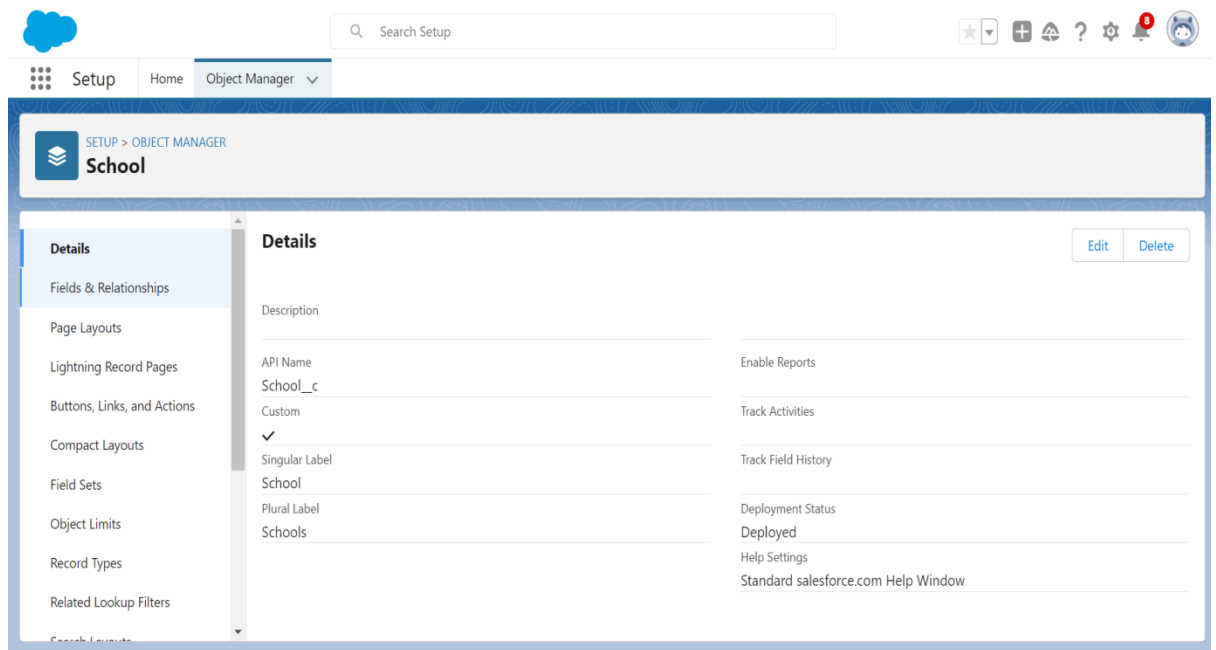
3.2. ACTIVITY AND SCREENSHOTS:

Attaching the sceenshots of the project “A CRM Applications for Schools and Colleges” along with the description.

MILESTONE-2:OBJECT

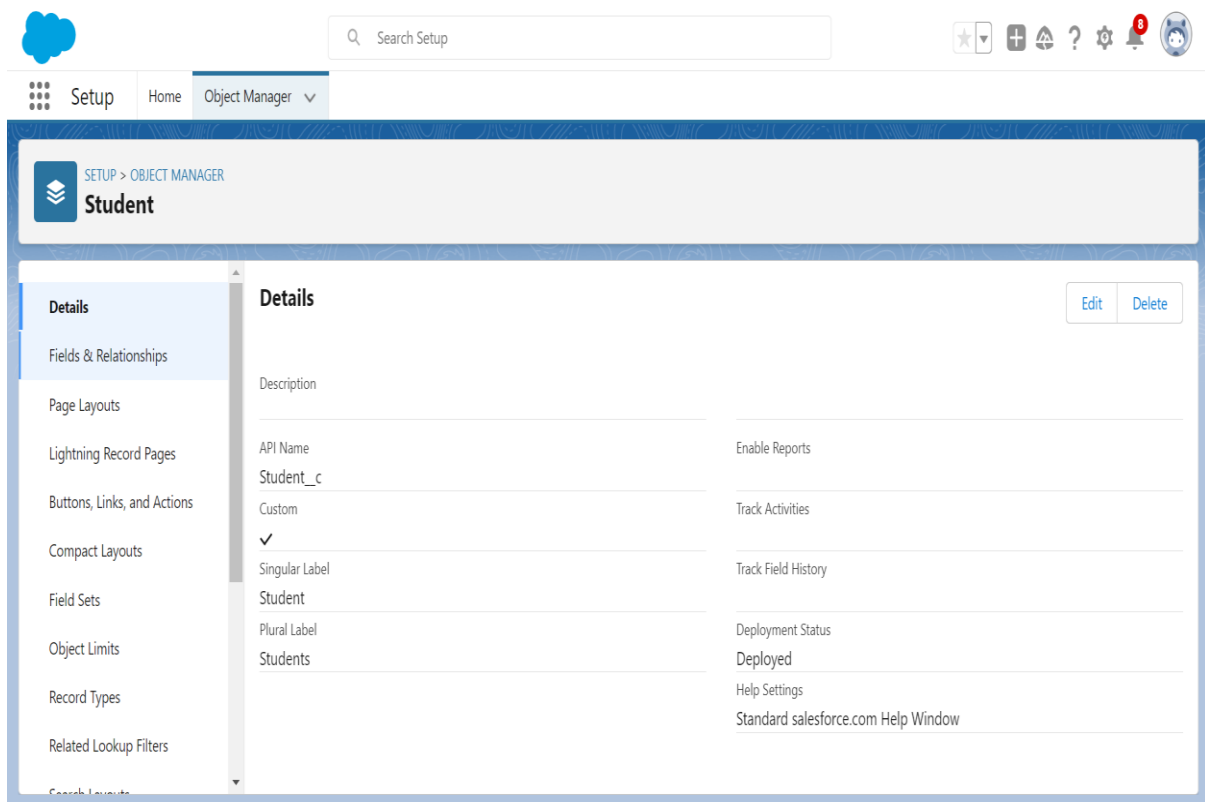
ACTIVITY-1: Creation of School object

Creation of objects for School Management:



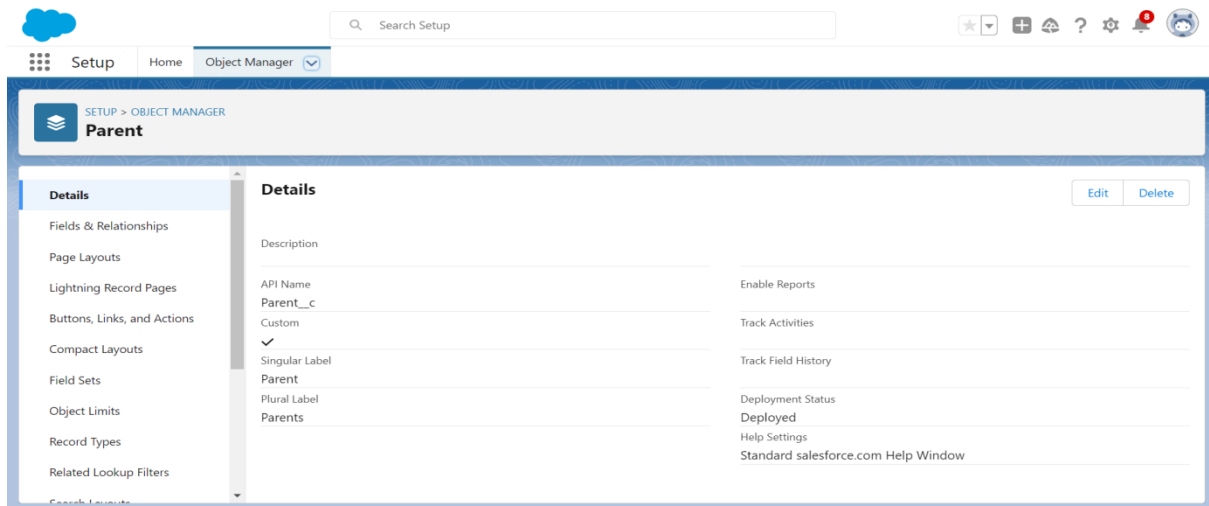
ACTIVITY-2:

Creation of Student object:



ACTIVITY-3:

Creation of Parent object:



MILESTONE-3: LIGHTNING APP

ACTIVITY-1

Creation of School Management app

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
School Management

* Developer Name ⓘ
Anjanah

Description ⓘ
Schools, Students, Reports and Dashboards

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

SM

School Management


Schools, Students, Reports and Dashboards

MILESTONE-4: FIELDS AND RELATIONSHIPS








ACTIVITY-1

Creation of fields for the School objects:

School Address:



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

School Custom Field

Address

[Back to School](#)

Validation Rules (0)

Custom Field Definition Detail


EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information








Field Label	Address	Object Name	School
Field Name	Address	Data Type	Text Area
API Name	Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Anjanah P. 13/04/2023, 11:27 am	Modified By	Anjanah P. 13/04/2023, 11:27 am

General Options

District:



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

School Custom Field

District

[Back to School](#)

Have feedback on rich text area custom fields? Comment on IdeaExchangeHelp for this Page

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	District	Object Name	School
Field Name	District	Data Type	Rich Text Area
API Name	District__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Anjanah P. 13/04/2023, 11:28 am	Modified By	Anjanah P. 13/04/2023, 11:28 am

Rich Text Area Options

State:

[Setup](#)
[Home](#)
[Object Manager](#)

SETUP > OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

School Custom Field

State

Back to School

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	State	Object Name	School
Field Name	State	Data Type	Text Area
API Name	State__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Anjanah P, 13/04/2023, 11:29 am		Modified By
			Anjanah P, 13/04/2023, 11:29 am

General Options

School Websites:

[Setup](#)
[Home](#)
[Object Manager](#)

SETUP > OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

School

New Custom Field

Help for this Page

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label	School Websites
Data Type	Text Area
Field Name	School_Websites
Description	

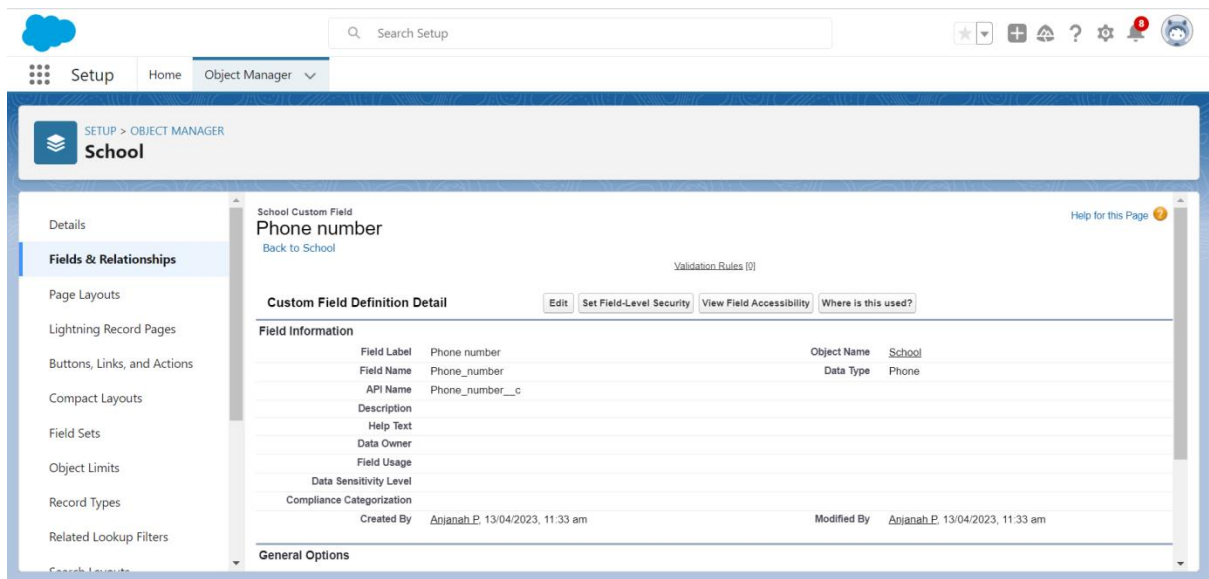
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	School Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Phone Number:



Setup > OBJECT MANAGER

School

School Custom Field
Phone number
[Back to School](#)

Validation Rules [0]

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

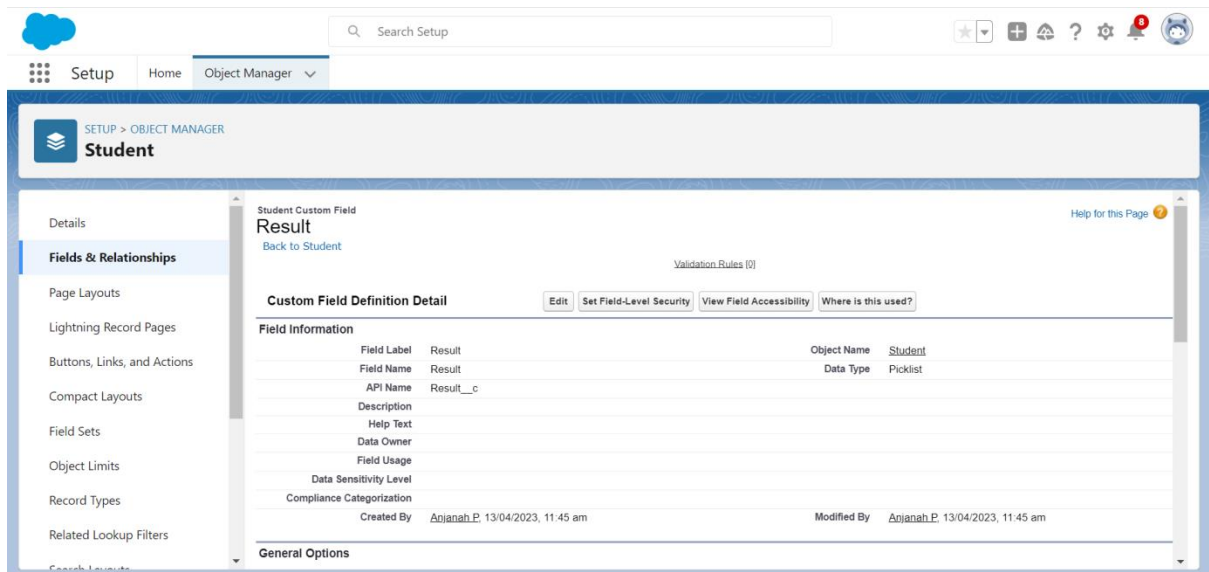
Field Label	Phone number	Object Name	School
Field Name	Phone_number	Data Type	Phone
API Name	Phone_number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Anjanah.P. 13/04/2023, 11:33 am	Modified By	Anjanah.P. 13/04/2023, 11:33 am

General Options

ACTIVITY-2:

Creation of fields for Student Object:

Results:



Setup > OBJECT MANAGER

Student

Student Custom Field
Result
[Back to Student](#)

Validation Rules [0]

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Result	Object Name	Student
Field Name	Result	Data Type	Picklist
API Name	Result__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Anjanah.P. 13/04/2023, 11:45 am	Modified By	Anjanah.P. 13/04/2023, 11:45 am

General Options

Phone Number:

Setup Home Object Manager

Search Setup

Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Student Custom Field

Phone number

Back to Student

Validation Rules [0]

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Phone number	Object Name	Student
Field Name	Phone_number	Data Type	Phone
API Name	Phone_number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Anjanah P. 13/04/2023, 11:39 am	Modified By	Anjanah P. 13/04/2023, 11:39 am

General Options

Marks:

Setup Home Object Manager

Search Setup

Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Student Custom Field

Mark

Back to Student

Validation Rules [0]

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

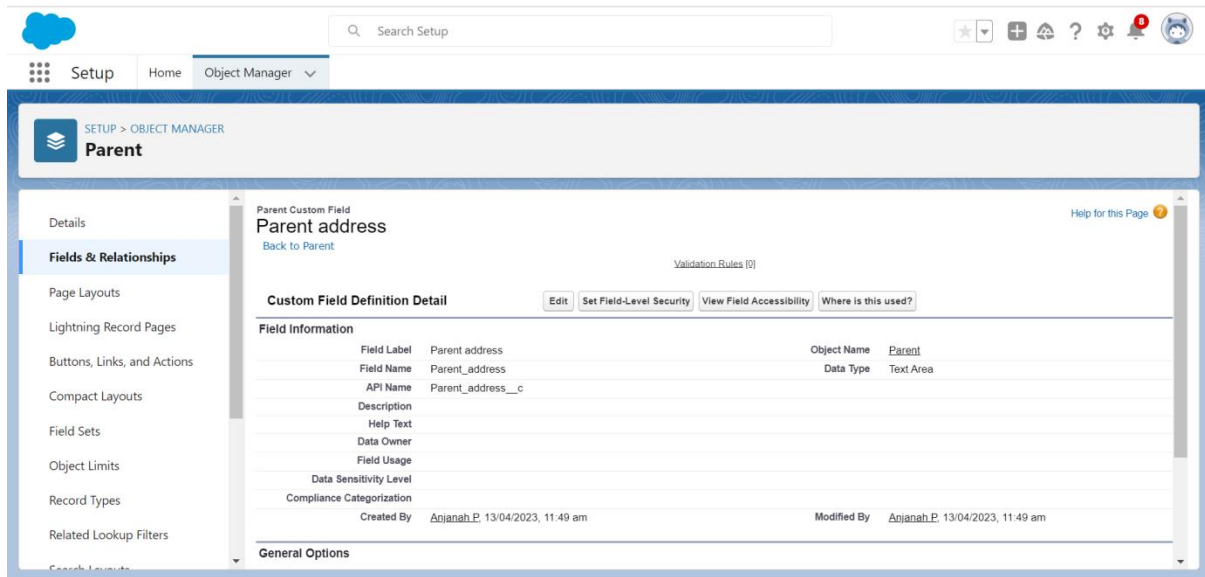
Field Label	Mark	Object Name	Student
Field Name	Mark	Data Type	Number
API Name	Mark__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Anjanah P. 13/04/2023, 11:47 am	Modified By	Anjanah P. 13/04/2023, 11:47 am

General Options

ACTIVITY-3:

Creation of fields for Parent object:

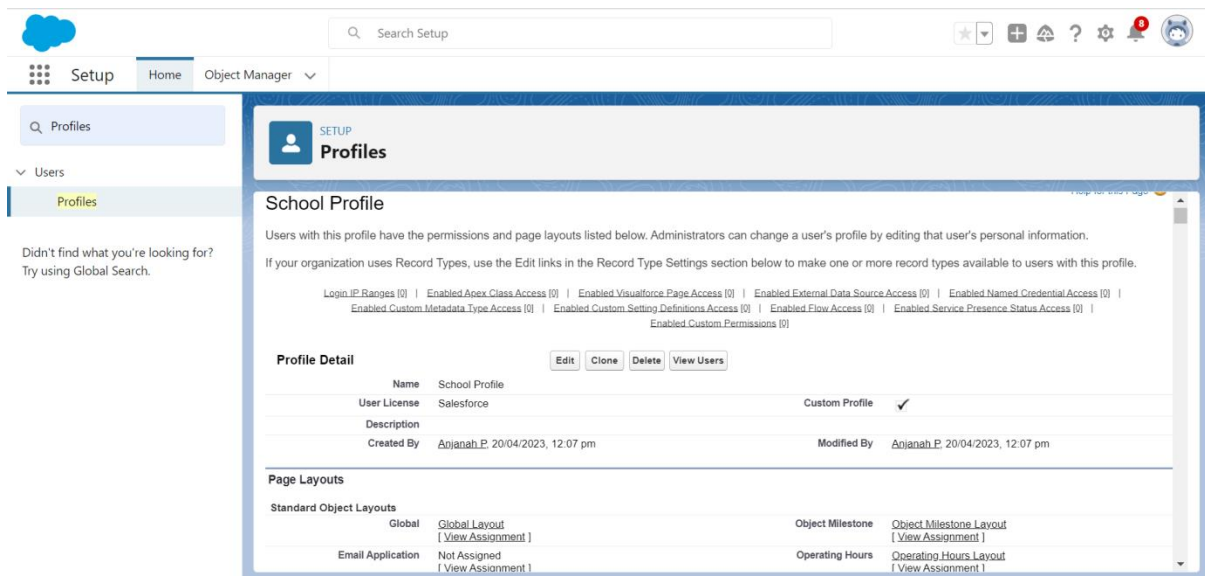
Parent address:



MILESTONE-5: PROFILE

ACTIVITY:

Creation on profile:



MILESTONE-6: USERS

ACTIVITY:

Creating the users:

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

SETUP Users

User Anjanah P

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Connected Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit Sharing Reset Password Freeze

Name	Alias	Email	Username	Nickname	Title	Company	Department	Division	Address	Time Zone	Role
Anjanah P	ap	anjanahp2020102@gmail.com	parentsanjanahp2020102@gmail.com	User18019000034784304326						(GMT+05:30) India Standard Time (Asia/Kolkata)	Salesforce
											Marketing User
											Offline User
											Knowledge User
											Flow User
											Service Cloud User
											Site.com Contributor User
											Site.com Publisher User

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Users' section. Both screenshots show the user profile for 'Anjanah P' with various details and role assignments.

Screenshot 1 (Top): Shows the user profile for 'Anjanah P' with the following details:

User Detail		Role
Name	Anjanah P	
Alias	ap	User License: Force.com - App Subscription
Email	anjanahp2020102@gmail.com	Profile: Force.com - App Subscription User
Username	principals2020102@gmail.com	Active: <input checked="" type="checkbox"/>
Nickname	User16819802124682553240	Marketing User: <input type="checkbox"/>
Title		Offline User: <input type="checkbox"/>
Company		Knowledge User: <input type="checkbox"/>
Department		Flow User: <input type="checkbox"/>
Division		Service Cloud User: <input type="checkbox"/>
Address		Site.com Contributor User: <input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User: <input type="checkbox"/>


Screenshot 2 (Bottom): Shows the user profile for 'Anjanah P' with the following details:

User Detail		Role
Name	Anjanah P	
Alias	ap	User License: Salesforce Platform
Email	anjanahp2020102@gmail.com	Profile: Standard Platform User
Username	teachers2020102@gmail.com	Active: <input checked="" type="checkbox"/>
Nickname	User16819801138067747407	Marketing User: <input type="checkbox"/>
Title		Offline User: <input type="checkbox"/>
Company		Knowledge User: <input type="checkbox"/>
Department		Flow User: <input type="checkbox"/>
Division		Service Cloud User: <input type="checkbox"/>
Address		Site.com Contributor User: <input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User: <input type="checkbox"/>








MILESTONE-7: PERMISSION SETS

ACTIVITY-1:

Permission sets-1:



Search Setup



SetupHomeObject Manager

permission sets

Users

Permission Sets

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

SETUP

Permission Sets

Permission SetPrincipal permission

Find Settings...CloneDeleteEdit PropertiesManage Assignments

Permission Set Overview

Description	API Name	Principal_permission
License	Namespace Prefix	
Session Activation Required	Created By	Anianah P. 13/04/2023, 12:25 pm
Last Modified By	Anianah P. 13/04/2023, 12:25 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

Permission Sets-2:



Search Setup



SetupHomeObject Manager

permission sets

Users

Permission Sets

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

SETUP

Permission Sets

Permission SetTeacher permission

Find Settings...CloneDeleteEdit PropertiesManage Assignments

Permission Set Overview

Description	API Name	Teacher_permission
License	Namespace Prefix	
Session Activation Required	Created By	Anianah P. 13/04/2023, 12:16 pm
Last Modified By	Anianah P. 13/04/2023, 12:16 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

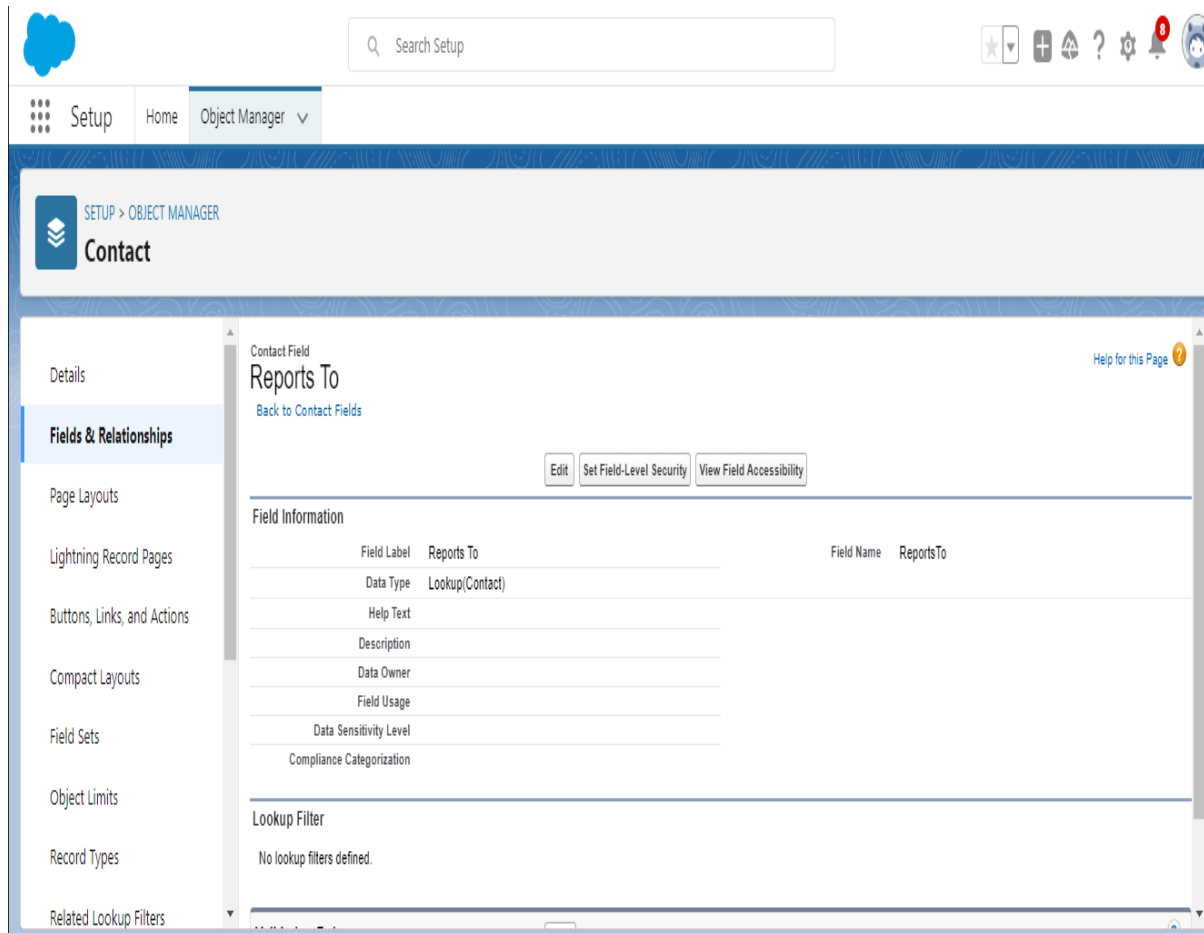
Object Settings

Permissions to access objects and fields, and settings such as tab availability

MILESTONE-8: REPORTS

ACTIVITY:

Reports:



4. TRAILHEAD PROFILE PUBLIC URL:

Team Leader - <https://trailblazer.me/id/anjap13>

Team Member 1 - <https://trailblazer.me/id/aartm13>

Team Member 2 - <https://trailblazer.me/id/aravs46>

Team Member 3 - <https://trailblazer.me/id/assim9>

Team Member 4 - <https://trailblazer.me/id/benmp>

5. ADVANTAGES & DISADVANTAGES:

List of advantages and disadvantages of the proposed solution.

ADVANTAGES	DISADVANTAGES
<ul style="list-style-type: none"> Learnt about Customer Relationship Management and understood the concept. 	<ul style="list-style-type: none"> There were problems in login and signup processes.
<ul style="list-style-type: none"> Helps to develop applications which will be useful for our career. 	<ul style="list-style-type: none"> There was internet problem.
<ul style="list-style-type: none"> Experience on creating Empathy map and Brainstorming. 	<ul style="list-style-type: none"> Did not have sufficient time to complete the project.
<ul style="list-style-type: none"> Useful to develop our skills thereby creating job opportunities. 	<ul style="list-style-type: none"> There was problem with arrival of verification code in mail.
<ul style="list-style-type: none"> Useful to develop our skills thereby creating job opportunities 	<ul style="list-style-type: none"> Most of the students doesn't have laptop or system to complete their project.

6. APPLICATIONS:

- It helps to maintain the records of School/Colleges.
- It helps to maintain a good relationship with the customers.
- It helps to create may new applications.
- Useful in cloud computing.
- It helps to identify sales opportunities, record service issues and manage marketing campaigns.

7. CONCLUSION:

This project helps us improve knowledge on app development. It helps to develop our skills thereby improving our job opportunities. This will be a good guidance for career.

A great thanks to the “NAAN MUDHALVAN” team and “SALESFORCE” team for giving this opportunity to learn a lot of new information from this project.

8. FUTURE SCOPE:

In this digitalized world, we must have the knowledge of computer. This project paved a way to know more about computer as well as app development.

As Salesforce helps to integrate data science and big data capabilities to its Service Cloud and Marketing Cloud. This would result in automated customer service tasks via Service Cloud and would let marketers leverage data for predictive and targeted marketing via Marketing Cloud.