



PROJECT isREPORT TEMPLATE

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 into their resume as well.



1.2 Purpose

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

2 Problem Definition & Design Thinking

2.1 Empathy Map



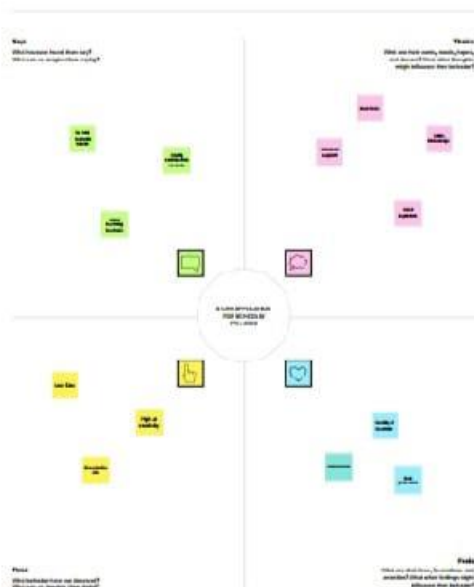


Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

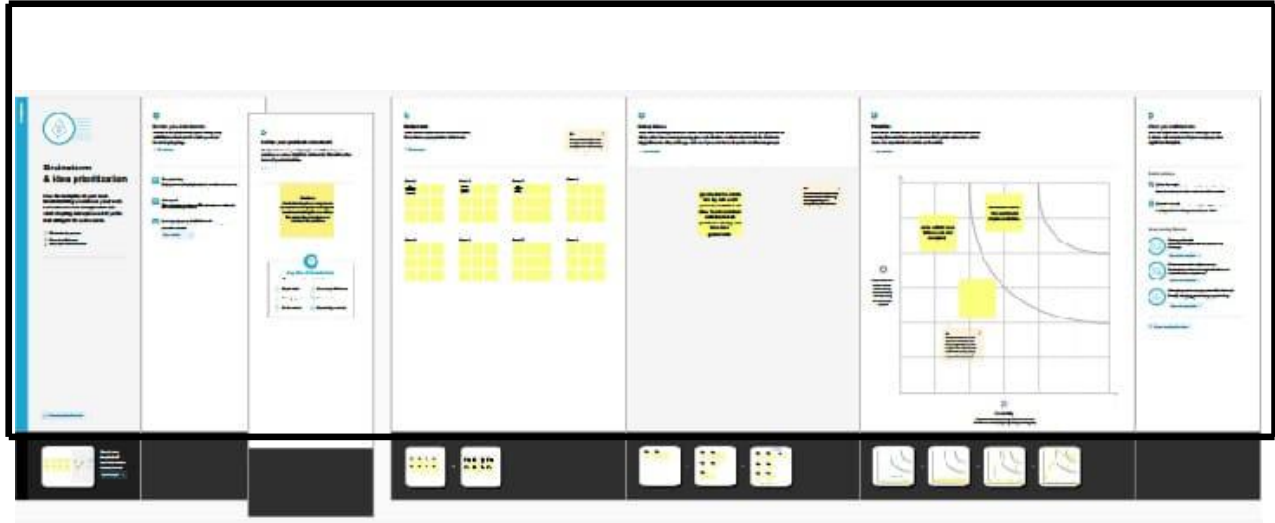
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

Wave number method

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



2.1 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model

Object Name	Fields in the Object	
	Field Name	Data Type
School	Schools	Master-Details
Student	Students	Phone
Parent	Parents	Text Area



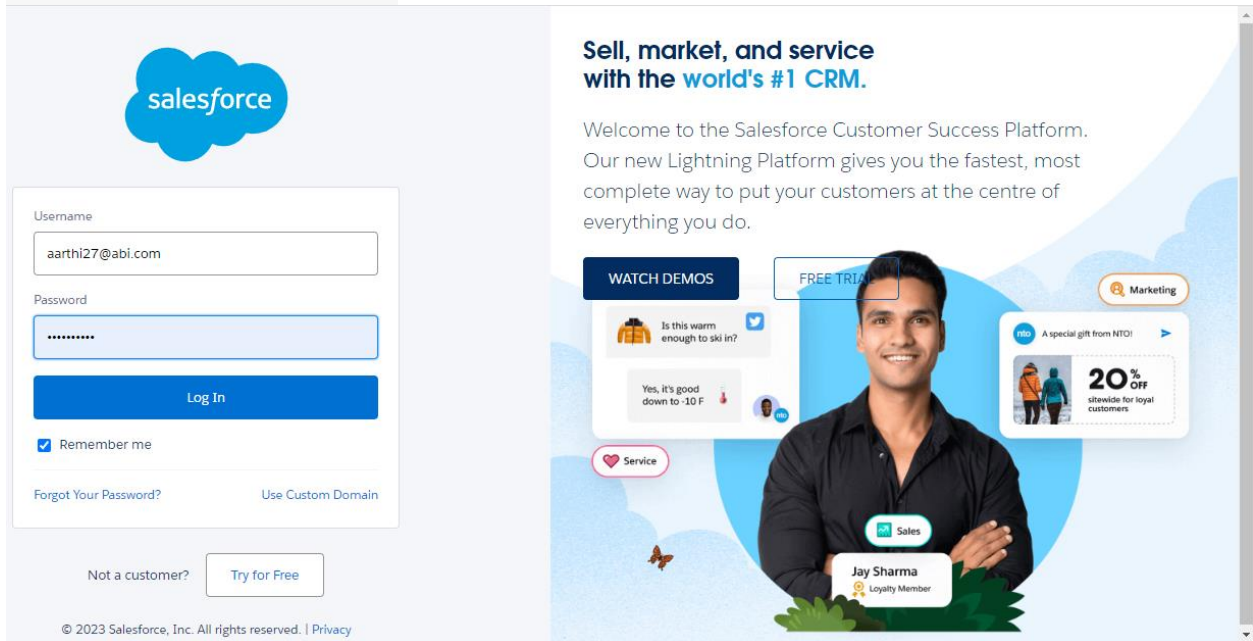
Name	School Name	Text (80)
Profile	Profile Name	School profile

3.2 ACTIVITY AND SCREENSHOTS

1. Creation of Salesforce platform

Go to Developer, Salesforce.com and click on sign up. **Enter our details as Name, Email, Role, Company etc. email is send your mail.id.**

Go to the inbox of the email that you used while signing up.click on the verify account to activate your account.



2. Creation of custom object: SCHOOL

Navigate to setup to select the object manager and create the object gives the detail like label name as school and enter the plural name, data type etc...and save it.



School | Salesforce

← → ↻ 🔒 kalaingarkarananithigove-Sf-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cbYu/Details/view

Gmail Maps

🔍 Search Setup

🌐

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

School

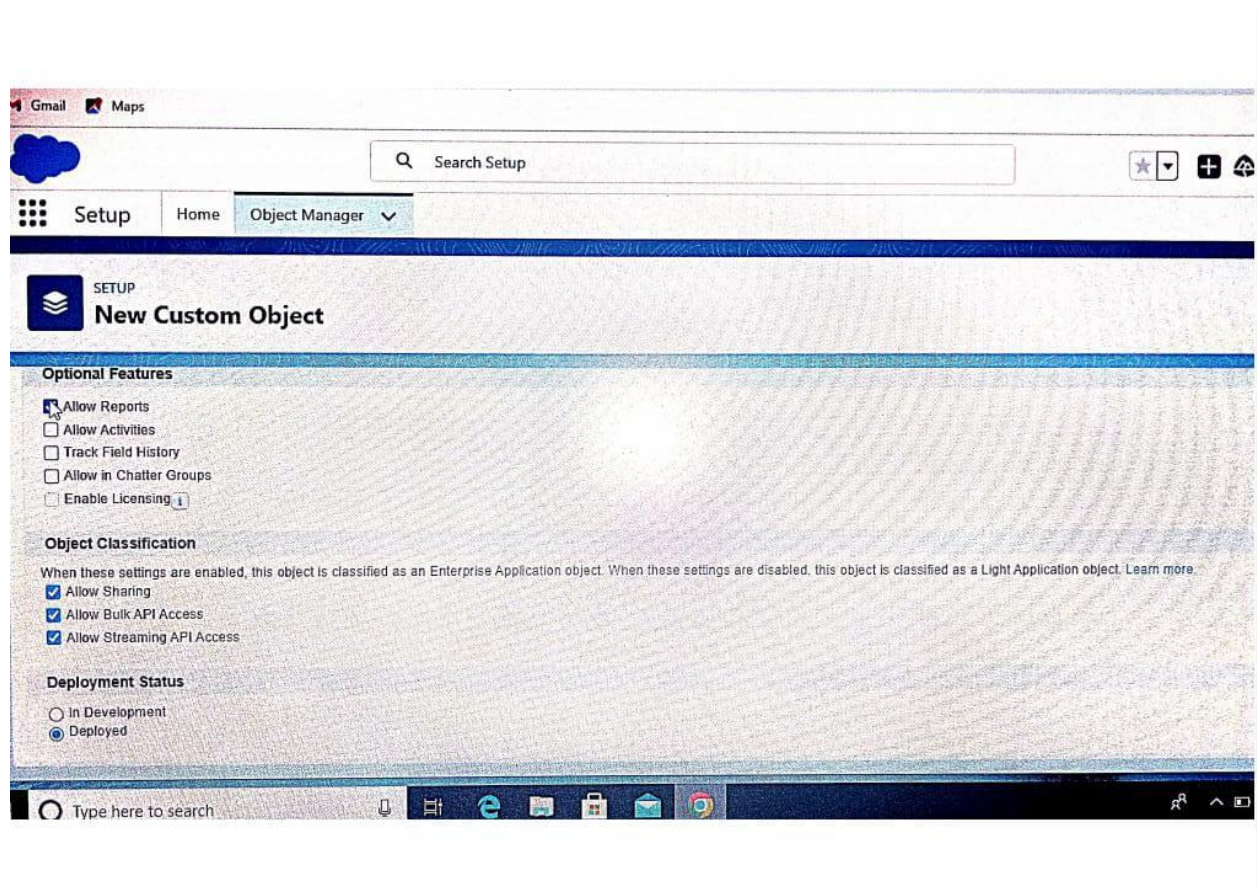
Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits

Details

Description	
API Name	Enable Reports
School__c	✓
Custom	Track Activities
✓	
Singular Label	Track Field History
School	
Plural Label	Deployment Status
Schools	Deployed
	Help Settings

Edit De



3 .Custom object: STUDENT

Gmail Maps

Search Setup

Setup Home Object Manager

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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☒


The Object Name is used when referencing the object via the API.

Object Name Example: Account

4.Custom object: PARENT





 **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

Custom Object Information

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

Label

Parent

Example: Account

Plural Label

Parents

Example: Accounts

Starts with vowel sound

☒

The Object Name is used when referencing the object via the API.

Object Name

Example: Account

5

A screenshot of the 'New Custom Object' setup page in Salesforce. The page has a dark blue header with the 'SETUP' icon and the title 'New Custom Object'. Below the header, there's a section titled 'New Custom Object' with a warning message: '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](#)'. The main section is 'Custom Object Definition Edit', which includes a 'Save' button and a 'Save & New' button. Under 'Custom Object Information', there's a note: 'The singular and plural labels are used in tabs, page layouts, and reports.' Below this, there are three input fields: 'Label' with the value 'Parent' (Example: Account), 'Plural Label' with the value 'Parents' (Example: Accounts), and 'Starts with vowel sound' which is checked. At the bottom, there's an 'Object Name' field (Example: Account) with a note: 'The Object Name is used when referencing the object via the API.' A small '5' icon is visible in the bottom right corner of the page.

5. Creation of App: SCHOOL MANAGEMENT

Navigate the setup and search for app manager. To Select the new lighting app option and give the app name as School Management and upload the picture. Click next.

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 ⓘ

Enter a developer name...

App Branding

Image ⓘ

Upload

Primary Color Hex

Value ⓘ



#0070D2



Next



6. Creation of Field & Relationships on The Custom Object

An Object relationship in salesforce is a two-way associated between two objects. Relationships are created by creating custom relationship fields on an object.

Creation of fields: SCHOOL



SETUP > OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Fields & Relationships

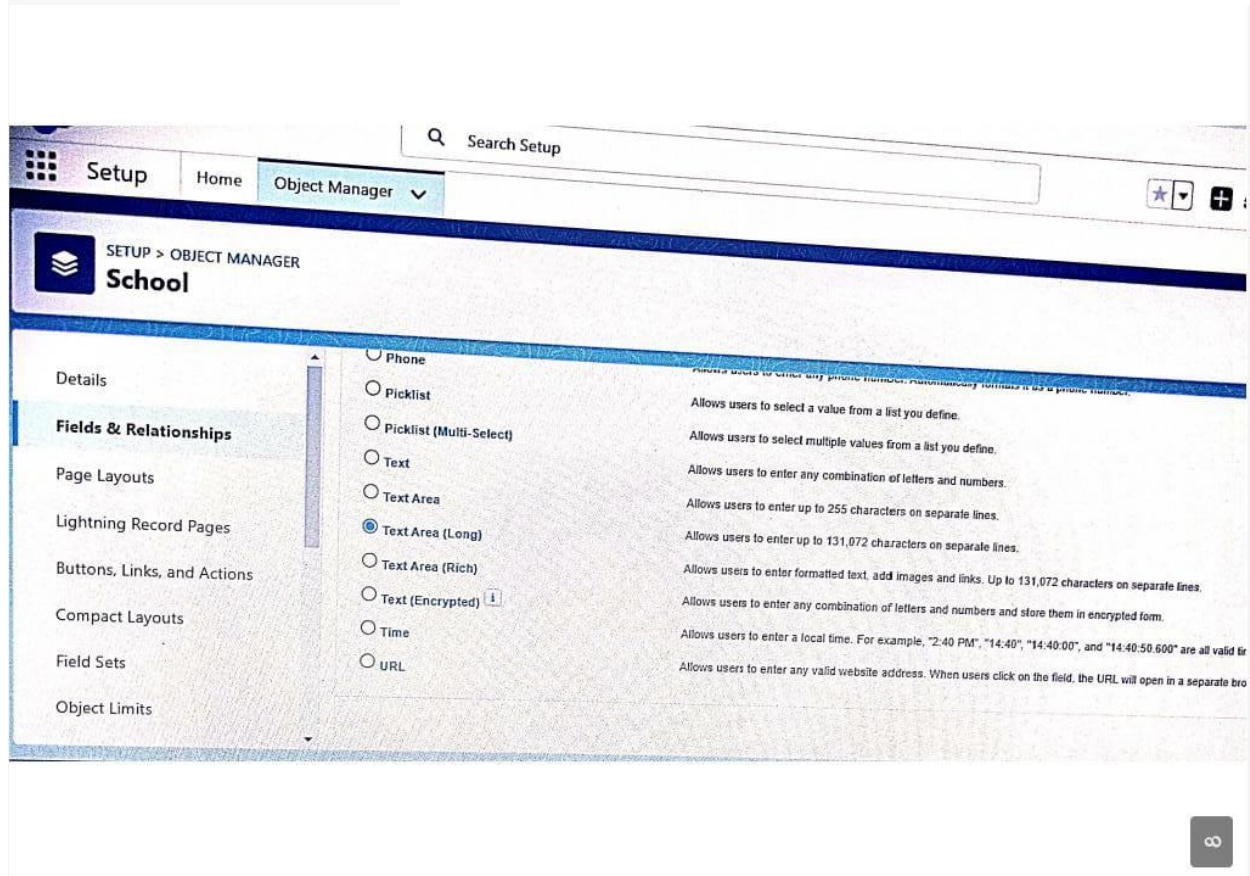
4 Items, Sorted by Field Label

New

Deleted Fields

Field Dependence

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
School Name	Name	Text(80)	



7. Creation of Profile

From Setup enter profiles in the Quick Find box, and select profiles. A profile is a group of settings and permission that define what a user can do in Salesforce. A profile controls object permissions, field permissions, user permissions, tab settings.



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Cloud Maps

Search Setup

Setup Home Object Manager

Profiles

Users

Profiles

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

Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile 12

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	

1-25 of 40 0 Selected

Previous Next

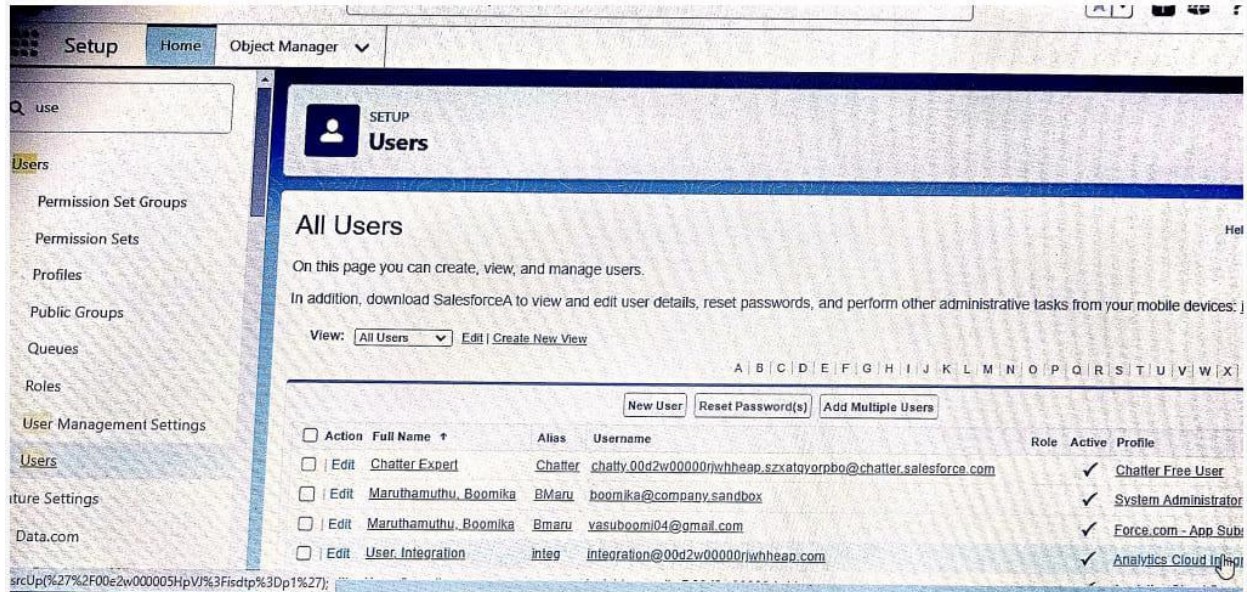
Page 1 of 2

kalaingarkarananthigove-Sf-dev-ed.develop.lightning.force.com/one/one/...



8. Creation of User

Navigate to setup in quick find search bar, search in user and select it. Give the first name and last name. Enter your email and enter your user name. select your user licence of salesforce. The profile field is standard user.



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'All Users' and includes instructions on how to manage users. Below the instructions, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A table lists the current users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rjwhheap.szxatqyorpbo@chatter.salesforce.com	Chatter Free User	✓	Chatter Free User
<input type="checkbox"/> Edit	Maruthamuthu, Boomika	BMaru	boomika@company.sandbox	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Maruthamuthu, Boomika	Bmaru	vasuboomi04@gmail.com	Force.com - App Sub	✓	Force.com - App Sub
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rjwhheap.com	Analytics Cloud In	✓	Analytics Cloud In

9. Creation of permission sets



From Setup, enter Permission Sets in the quick Find box, then
Select permission

A screenshot of the Salesforce Setup interface. At the top, there is a "Search Setup" bar. Below it, a navigation bar shows "Setup" as the active tab, with "Home" and "Object Manager" as options. On the left sidebar, under the "Permission" section, "Permission Sets" is highlighted. The main content area is titled "Permission Sets" and "Create". It contains a form titled "Enter permission set information" with fields for "Label" (containing "Permission Sets"), "API Name" (containing "Permission_Sets"), and "Description" (empty). There are "Save" and "Cancel" buttons above the form. Below the form, there is a checkbox for "Session Activation Required" and a link to "Select the type of users who will use this permission set".



Creation of Reports

A report is a list of records that meet the criteria you define. It is displayed in rows and columns.

The screenshot shows the 'School Management' interface with the 'Reports' tab selected. A sidebar on the left lists 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'FOLDERS' (All Folders, Created by Me, Shared with Me). The main area displays a table of recent reports.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Students Report	A CRM APPLICATION FOR SCHOOLS/COLLEGES	Private Reports	Boomika Maruthamuthu	15/4/2023, 10:38 am	
New Schools Report	A CRM APPLICATION FOR SCHOOLS/COLLEGES	Private Reports	Boomika Maruthamuthu	15/4/2023, 11:10 am	
New Schools Report		Private Reports	Boomika Maruthamuthu	15/4/2023, 10:29 am	
New Parents Report	A CRM APPLICATION FOR SCHOOLS/COLLEGES	Private Reports	Boomika Maruthamuthu	15/4/2023, 10:43 am	
New Parents Report	A CRM APPLICATION FOR SCHOOLS /COLLEGES	Private Reports	Boomika Maruthamuthu	15/4/2023, 10:41 am	

4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER: K. AARTHI -

<https://trailblazer.me/id/akuppusamy3>

TEAM MEMBER 1: T. ASWATHI -

<https://trailblazer.me/id/aaswathi1>



TEAM MEMBER 3: M.BOOMIKA -

<https://trailblazer.me/id/bmaruthamuthu>

TEAM MEMBER 4:N.DEEPA -

<https://trailblazer.me/id/deepn28>

5.ADVANTAGES

- .Improve student Admissions Lifecycle.
- Track Student Life-Cycles Within the Institution.
- Monitor Fee Payments and Remainders.
- Keep Alumni Information Safe and Accessible.

6.DISADVANTAGES

- Security concerns associated with centralized data.
- It requires a process driven sales organization



- It may not suit every business.
- Staff over-reliance on CRM may diminish customer

7.APPLICATIONS

- A CRM is a system that helps schools manage the entire lifecycle of a potential customer.sometimes also referred to as a lead.with a CRM,you can track and store the data that important to your operations,all in one easy –to- access place.
- This CRM makes it easy for salesforce to track records of their activities,share information internally and keep in touch with their customers.



- A Good CRM helps you understand your market and the needs of your customers.

8.CONCLUSION

- The issues of CRM and customer service are vital in the developing environment as customer expectations increase .This is especially the case in developing countries where changes in customer expectations are linked to increasing educational standards and literacy.
- It is beneficial for the parents and students to learn about CRM.
- The project makes the students life style as well as easier and in good manner.



9.FUTURE SCOPE

- Measure and inform sales enablement.
- Unity sales, Marketing and Operations around common goals and Definitions.
- Focus on customer retention through customer-oriented process.
- Use mass personalisation through relevant data.

