A CRM Application for Schools and Colleges

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".
- Customer Relationship Management helps to manage the relationships with the customers.

1.2 PURPOSE:

- This is my first project in my college life. And I am very thankful to get this change to work as leader in the project of "A CRM Application for Schools and Colleges.
- This project helps us to understands the customer relationships, makes us to create new app, learned about "Project Development Process", "Design Thinking".
- Mural helps us to create the empathy map and Ideation & Brainstorming map.

2. PROBLEM DEFINITION & DESIGN THINKING:

Problem Definition:

Finding problem statement by using Ideation & Idea Prioritization.

Design Thinking:

Design thinking involves five steps:

- Empathize
- Define
- Ideate
- Prototype
- Test

2.1 EMPATHY MAP:

An Empathy Map is a simple, easy-to-digest visual that captures knowledge about a user's behaviour and attitudes. It is a useful tool to helps teams better understand their users.

Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.

Template

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

Need some inspiration?

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

Open example →

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 magine them saying?

Says to ask the opinion of the experts

says if the product is suitable

says which brand we need to buy

says if the product is comfy to keep in the room.

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

The thought of wasting the time

The thought of wasting the money

The fear of buying a unbranded product

The thought of, whether the product has warranty

Makes to think, whether the product has the storage capacity to store our information and things.

Rushmiya, k

Searching the best product in google

After buying the product, we may feel, the product is good or bad in functioning.

We may feel, we need to buy a better product than the product which we brought.

while comparing with other's product, we may feel that our product is best.

Searching the rates and reviews of the people, who bought it already.

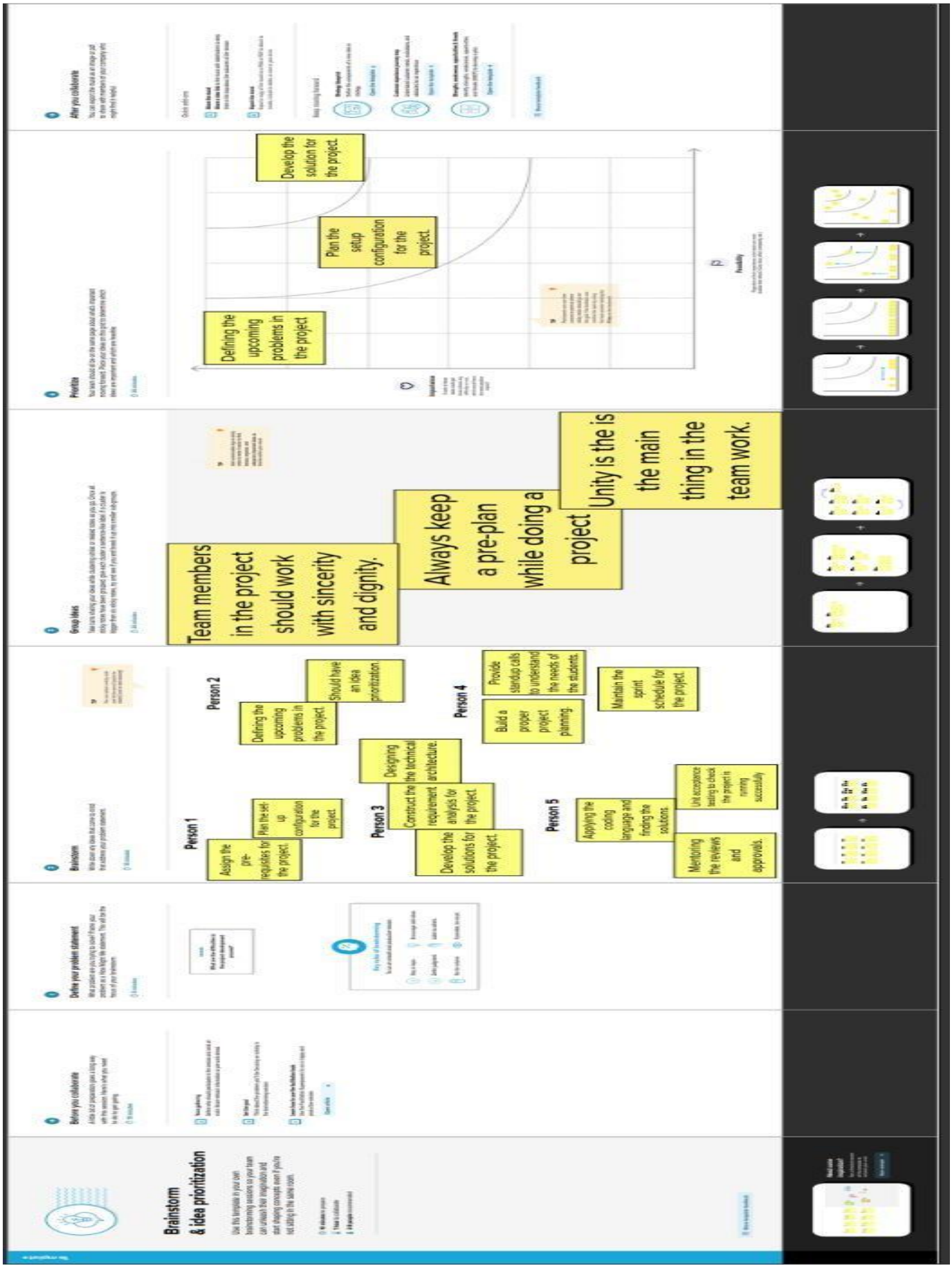
Searching the new model of the product which was launched recently.

Does
What behavior have we observed? What can we imagine them doing?

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

2.2 IDEATION & BRAINSTORMING MAP:

Pasting the ideation & brainstorming Map screenshot.



3. RESULT:

3.1 DATA MODEL:

<table>
<tr><th>Object name</th><th>Fields in the object</th></tr>
<tr><td>Object 1:</td><td>
<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>
</td></tr>
<tr><td>Object 2:</td><td>
<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>
</td></tr>
</table>

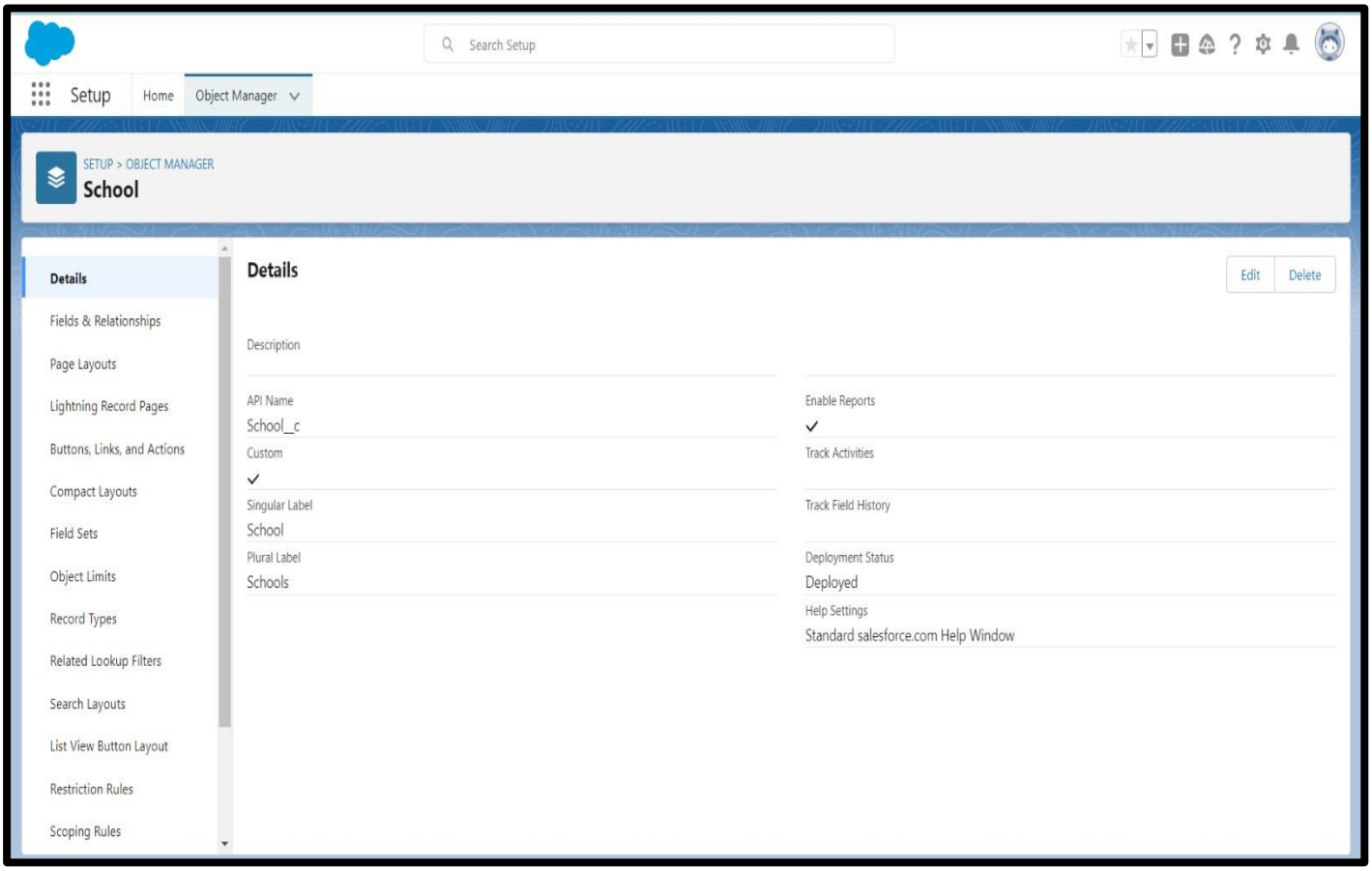
3.2 ACTIVITY & SCREENSHOTS:

Attaching the screenshots of the project "A CRM Applications for Schools and Colleges" along with the description.

MILESTONE-2: OBJECT

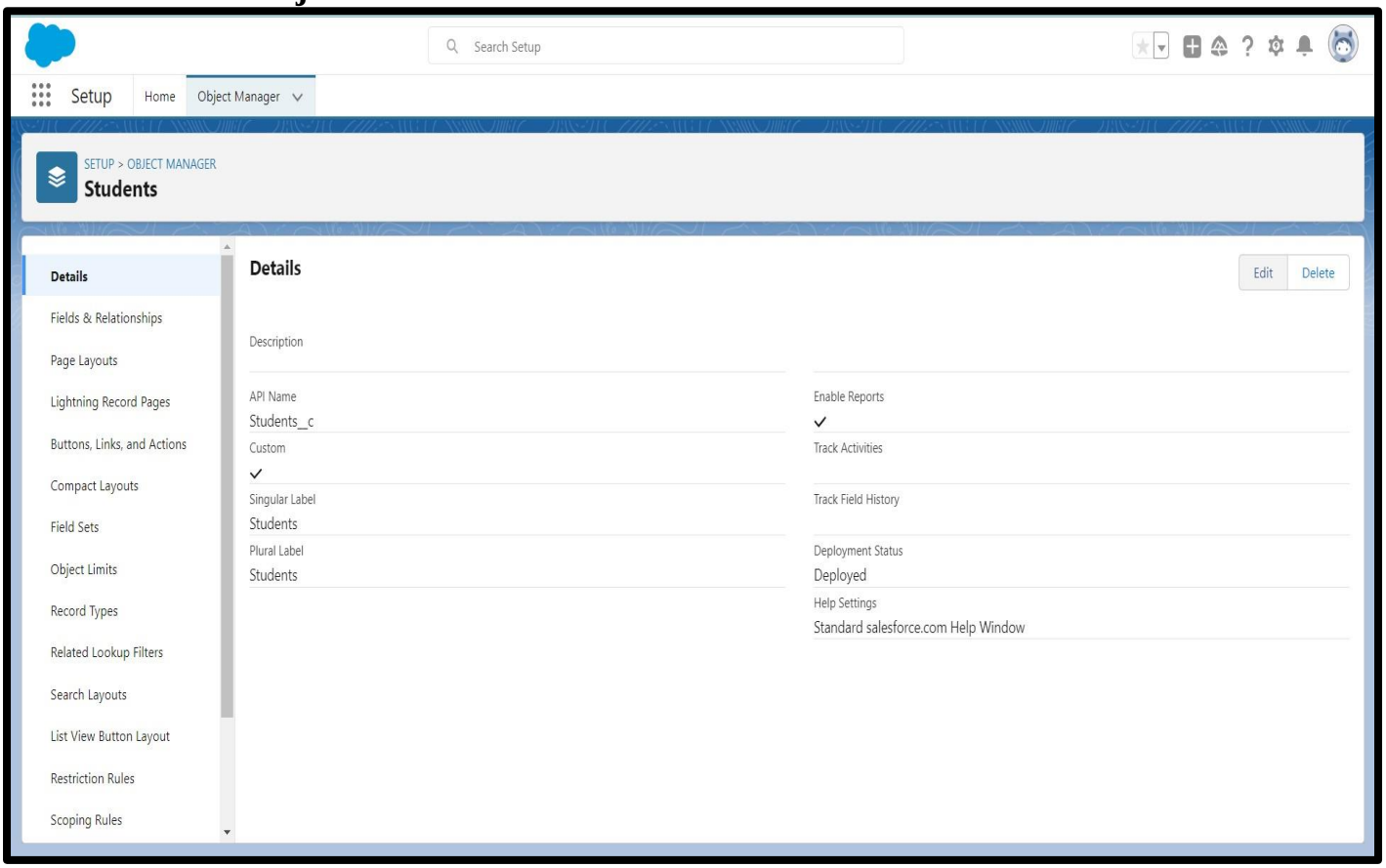
ACTIVITY-1: Creation of School object

Creation of objects for School Management:

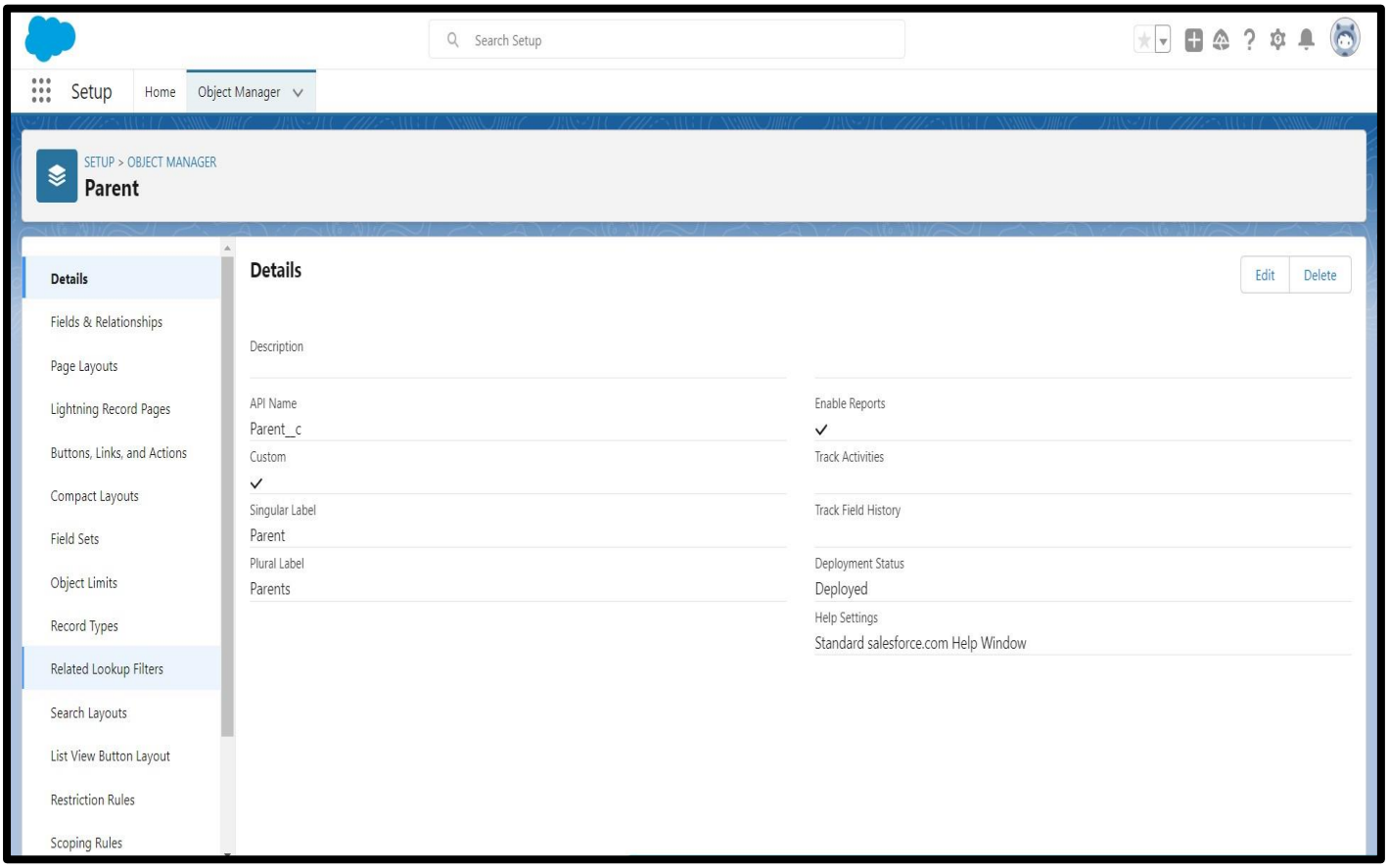


ACTIVITY 2:

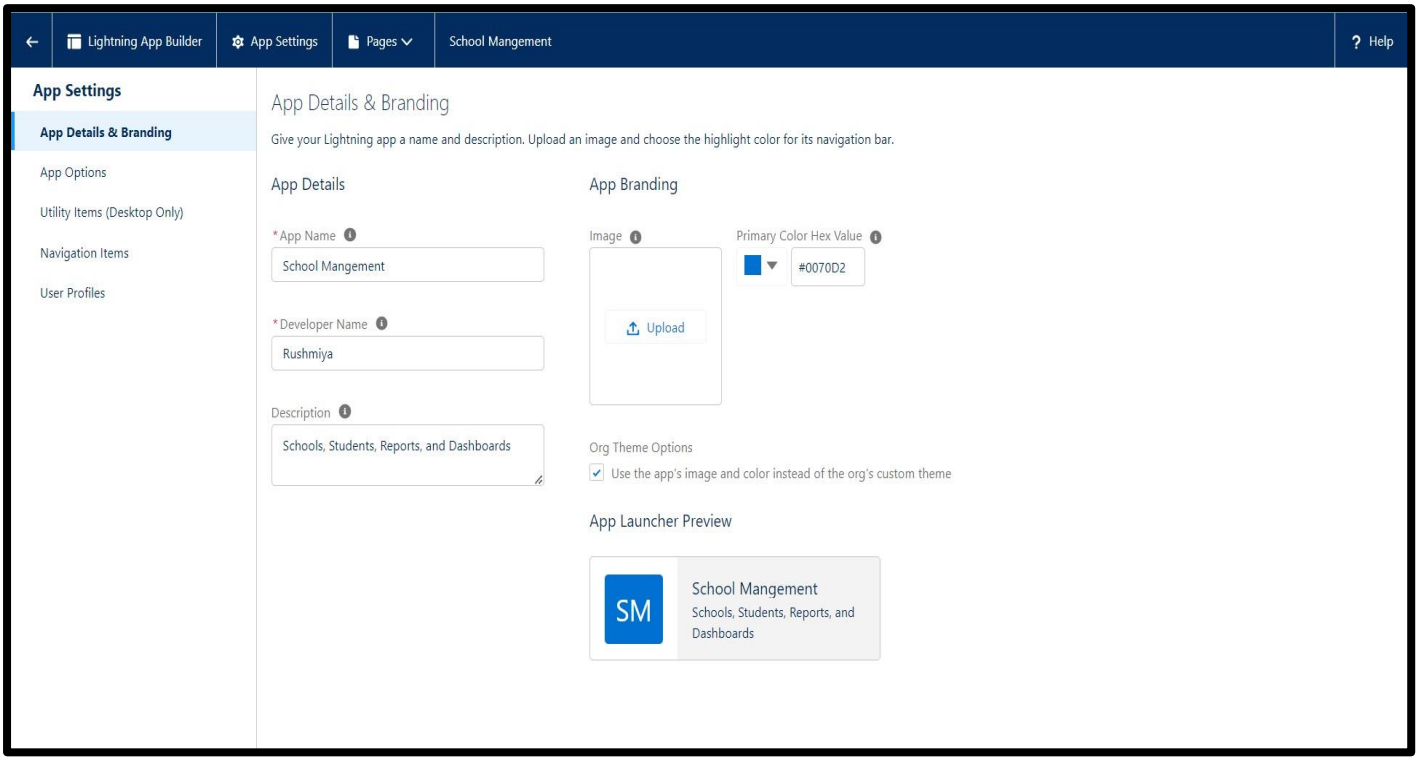
Create Student Object:



ACTIVITY 3:
Create Parent Object:



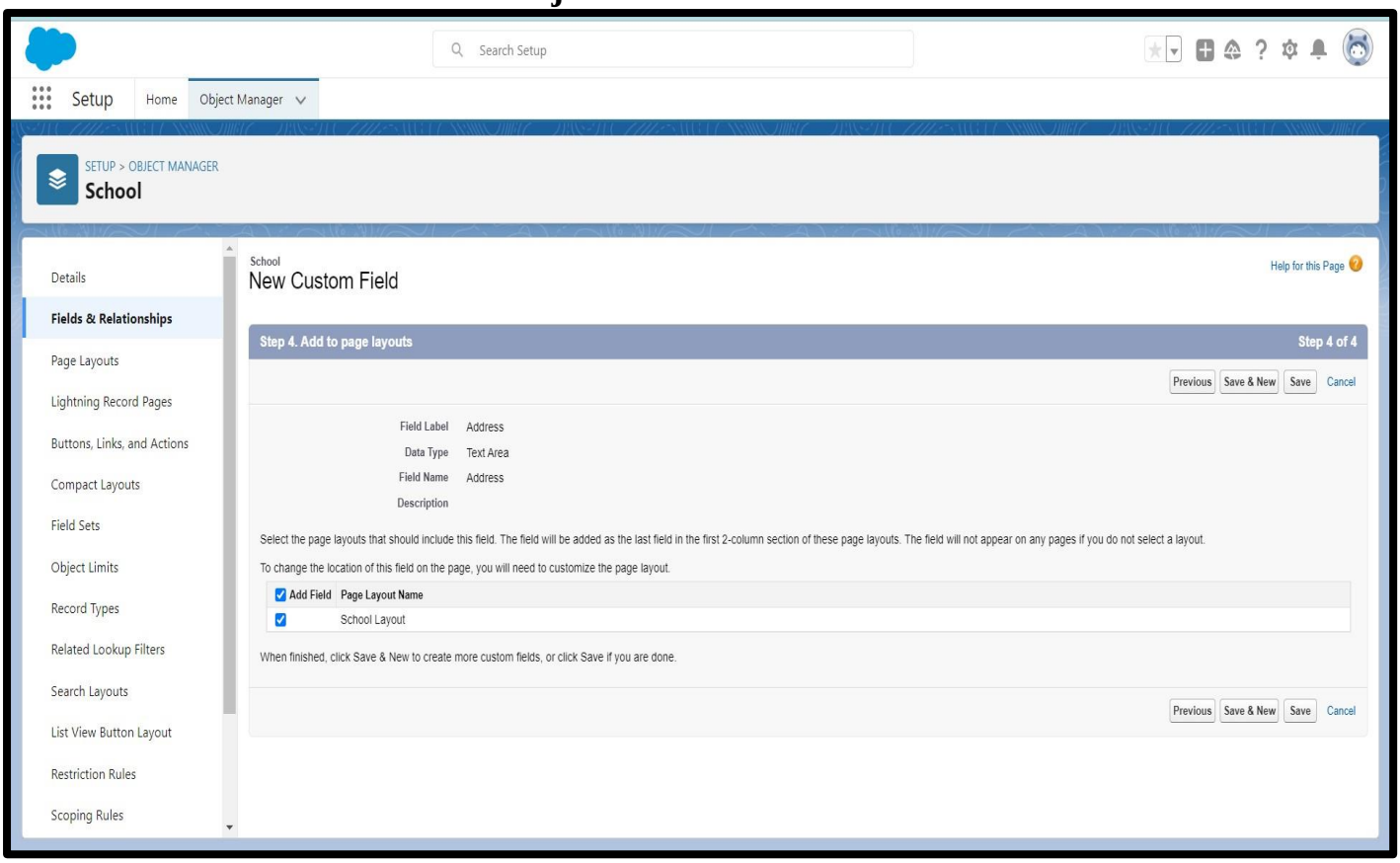
MILESTONE-3: LIGHTNING APP
ACTIVITY:
Create the School Management App:

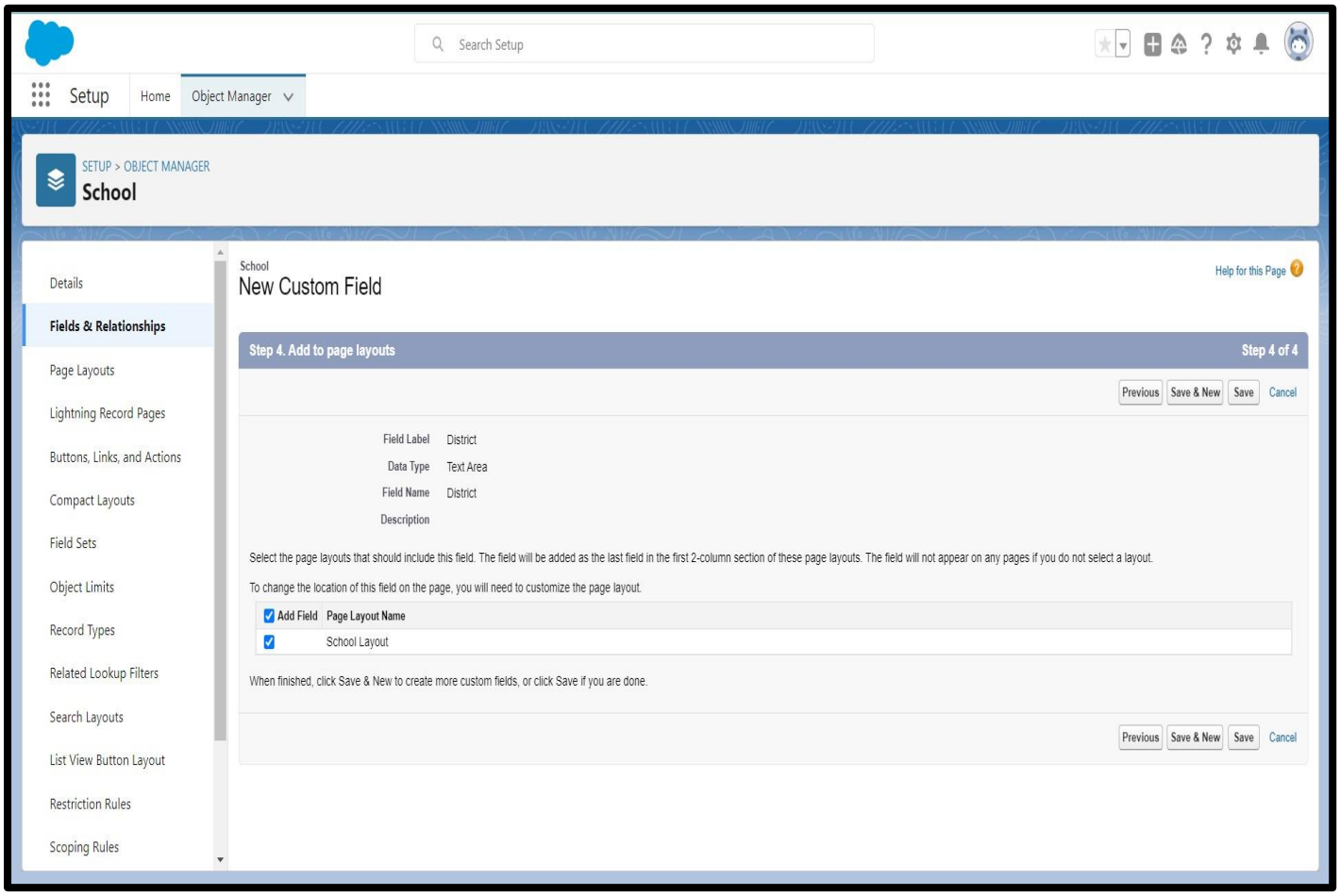


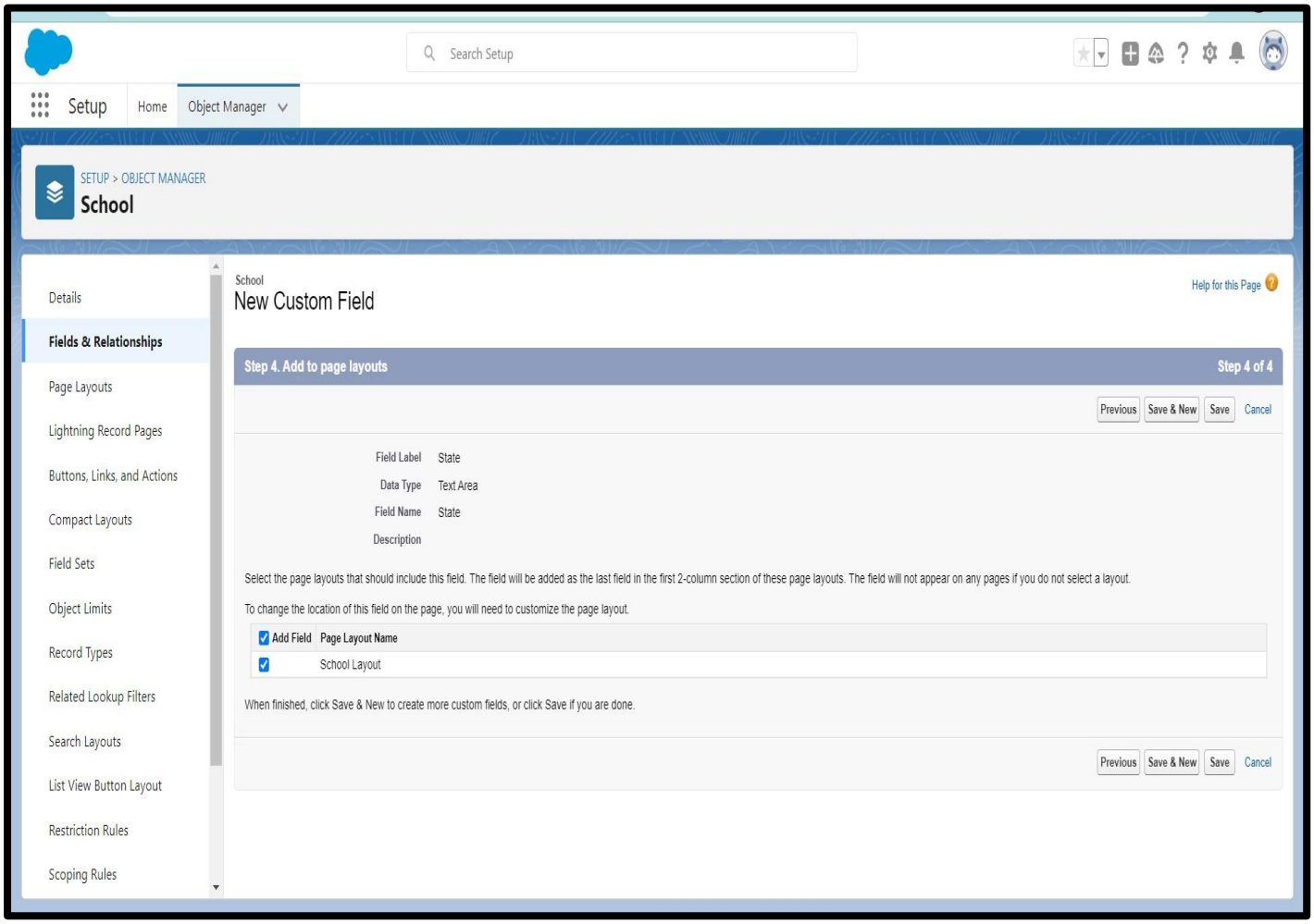
MILESTONE-4: FIELDS AND RELATIONSHIP

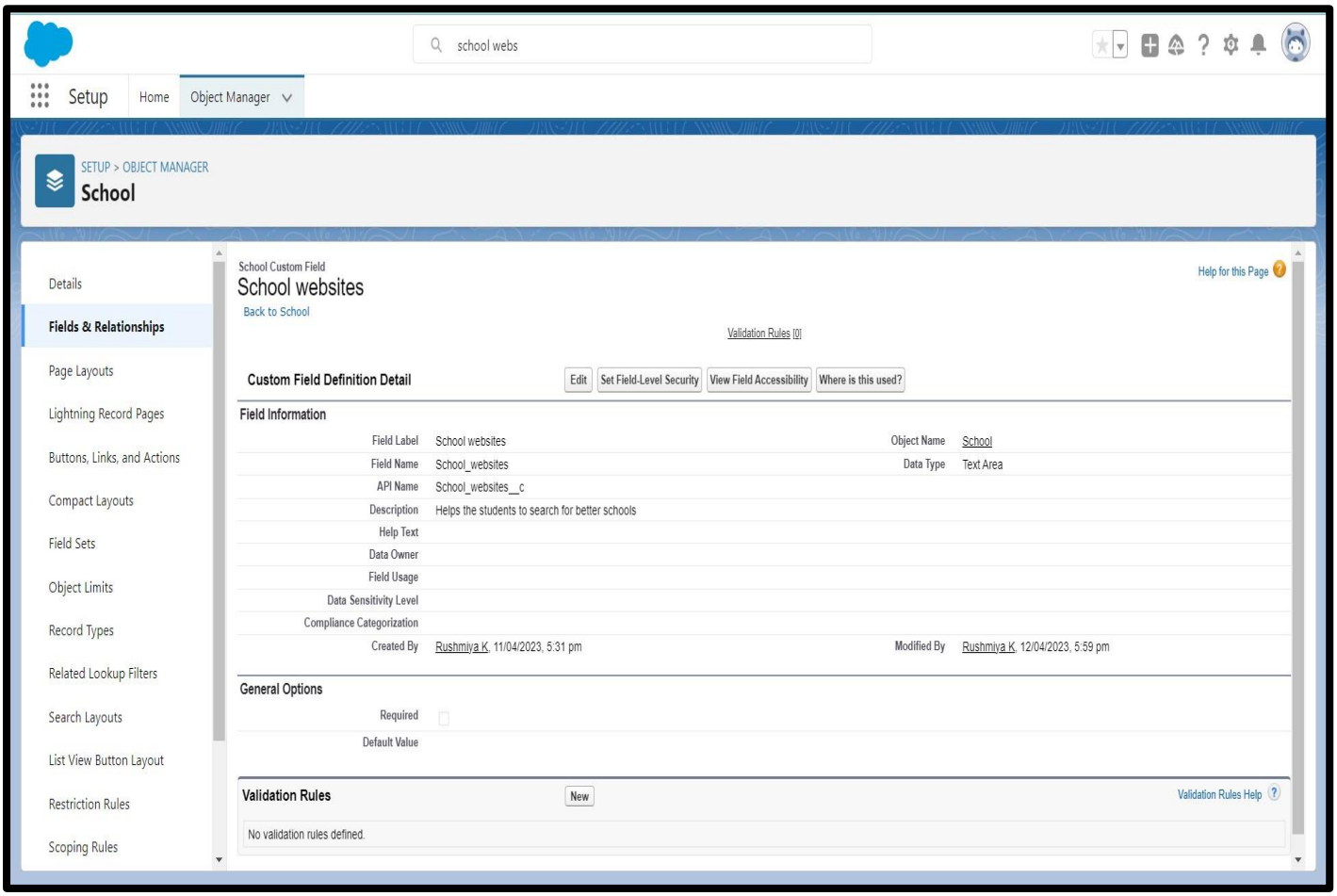
ACTIVITY-1

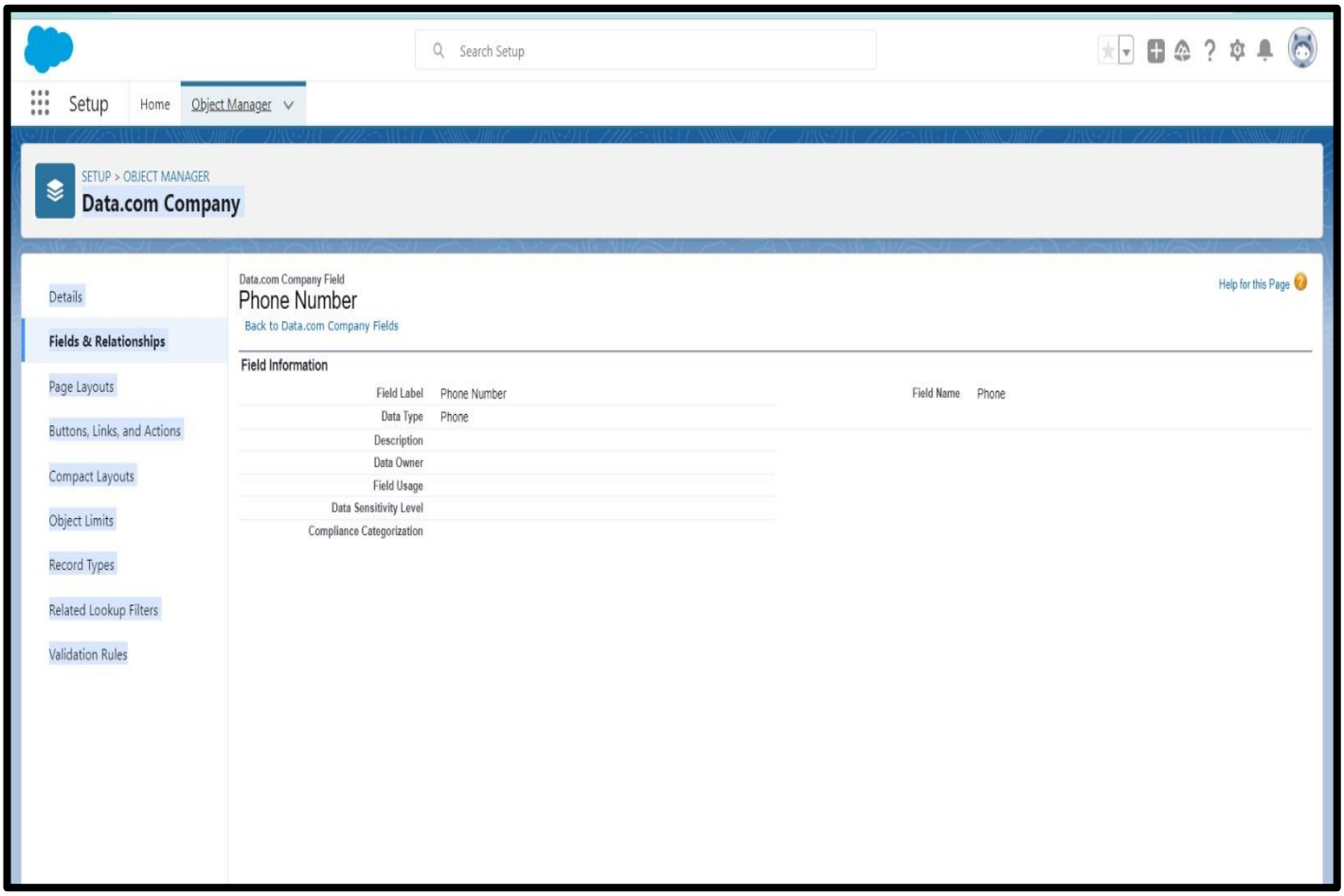
Creation of fields for the School objects:



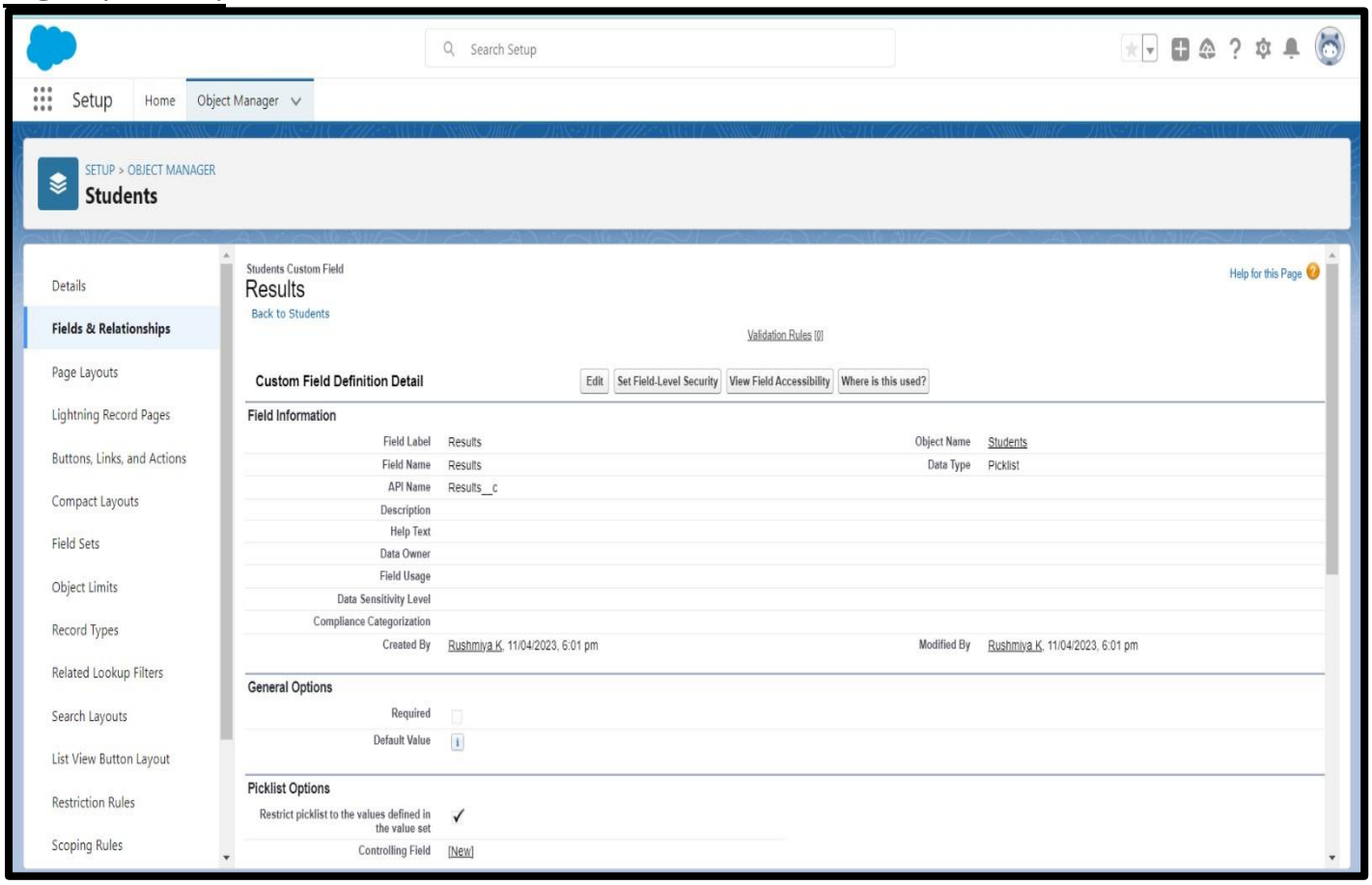

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
School
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
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 District
Data Type Text Area
Field Name District
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.
Add Field
Page Layout Name
School Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.


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
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
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 State
Data Type Text Area
Field Name State
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.
Add Field
Page Layout Name
School Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.


school webs
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
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
School Custom Field
School websites
Back to School
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label School websites
Field Name School_websites
API Name School_websites__c
Description Helps the students to search for better schools
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Rushmiya K, 11/04/2023, 5:31 pm
Object Name School
Data Type Text Area
Modified By Rushmiya K, 12/04/2023, 5:59 pm
General Options
Required
Default Value
Validation Rules
New
Validation Rules Help
No validation rules defined.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Data.com Company
Details
Fields & Relationships
Page Layouts
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Validation Rules
Data.com Company Field
Phone Number
Back to Data.com Company Fields
Help for this Page
Field Information
Field Label Phone Number
Data Type Phone
Description
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Field Name Phone

ACTIVITY-2: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Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Students
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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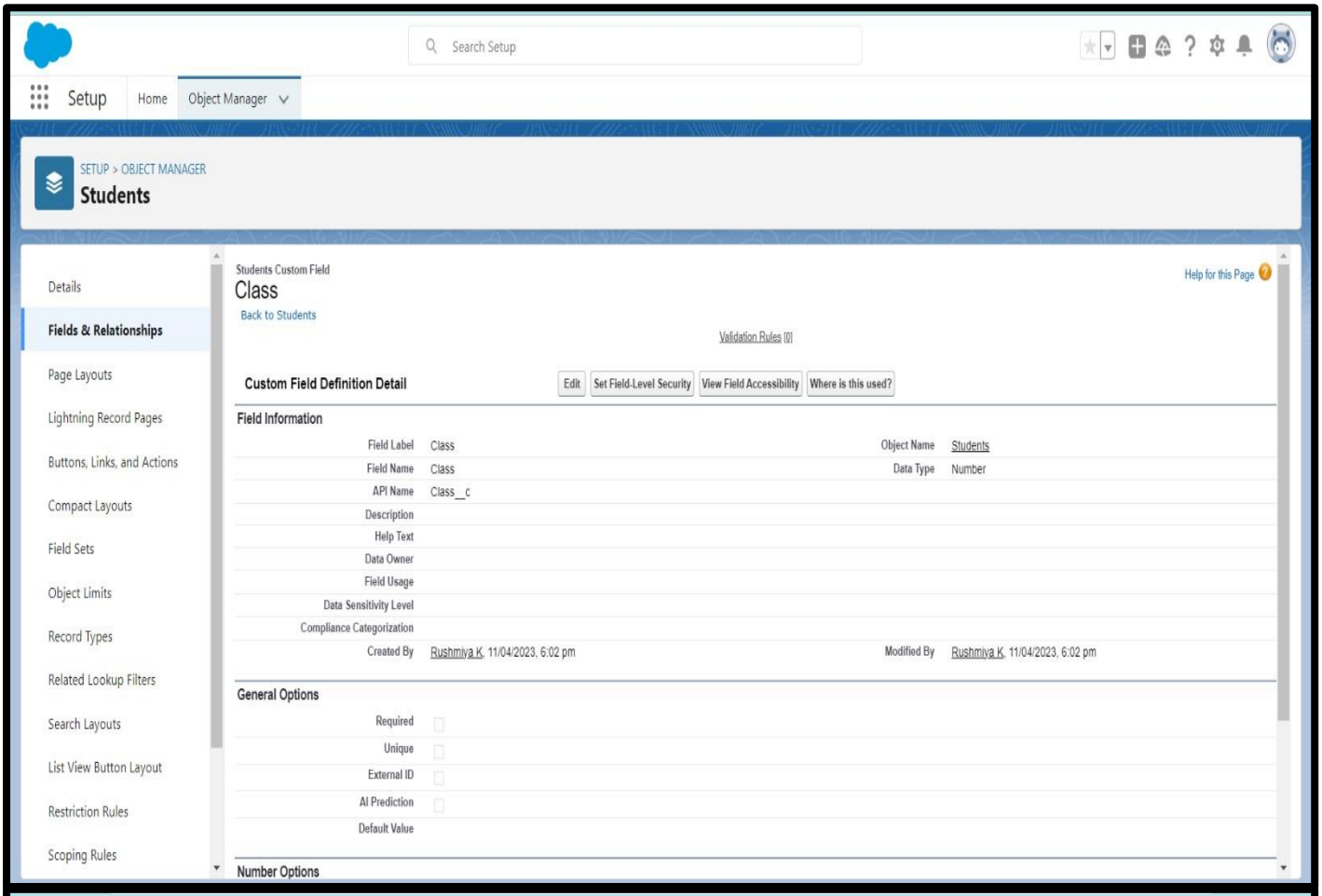
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Students Custom Field
Results
Back to Students
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Results
Field Name Results
API Name Results__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Rushmiya K, 11/04/2023, 6:01 pm
Object Name Students
Data Type Picklist
Modified By Rushmiya K, 11/04/2023, 6:01 pm
General Options
Required
Default Value
Picklist Options
Restrict picklist to the values defined in the value set
Controlling Field [New]


Search Setup
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Home
Object Manager
SETUP > OBJECT MANAGER
Students
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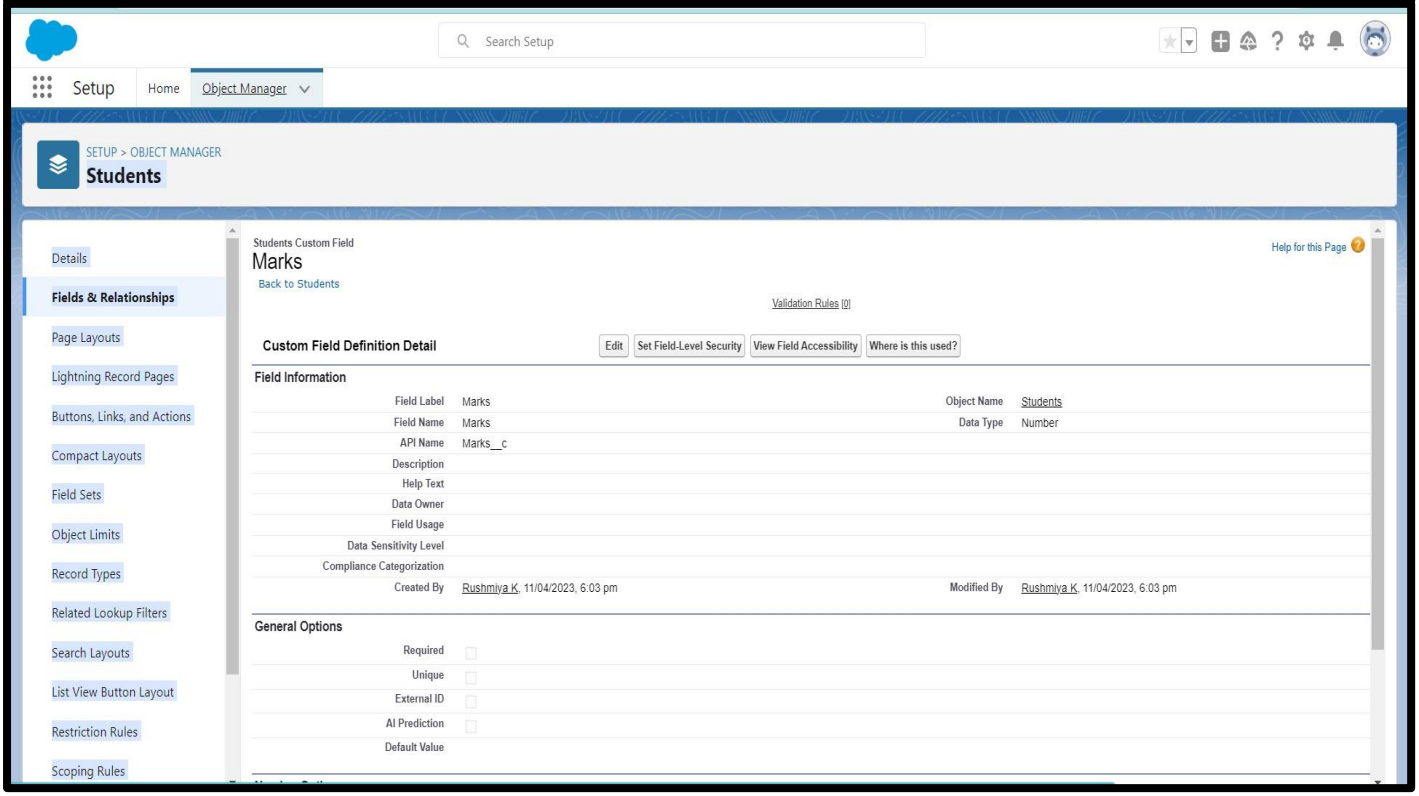
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Students Custom Field
Class
Back to Students
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Class
Object Name Students
Field Name Class
Data Type Number
API Name Class__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Rushmiya K, 11/04/2023, 6:02 pm
Modified By Rushmiya K, 11/04/2023, 6:02 pm
General Options
Required
Unique
External ID
AI Prediction
Default Value
Number Options


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Students
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Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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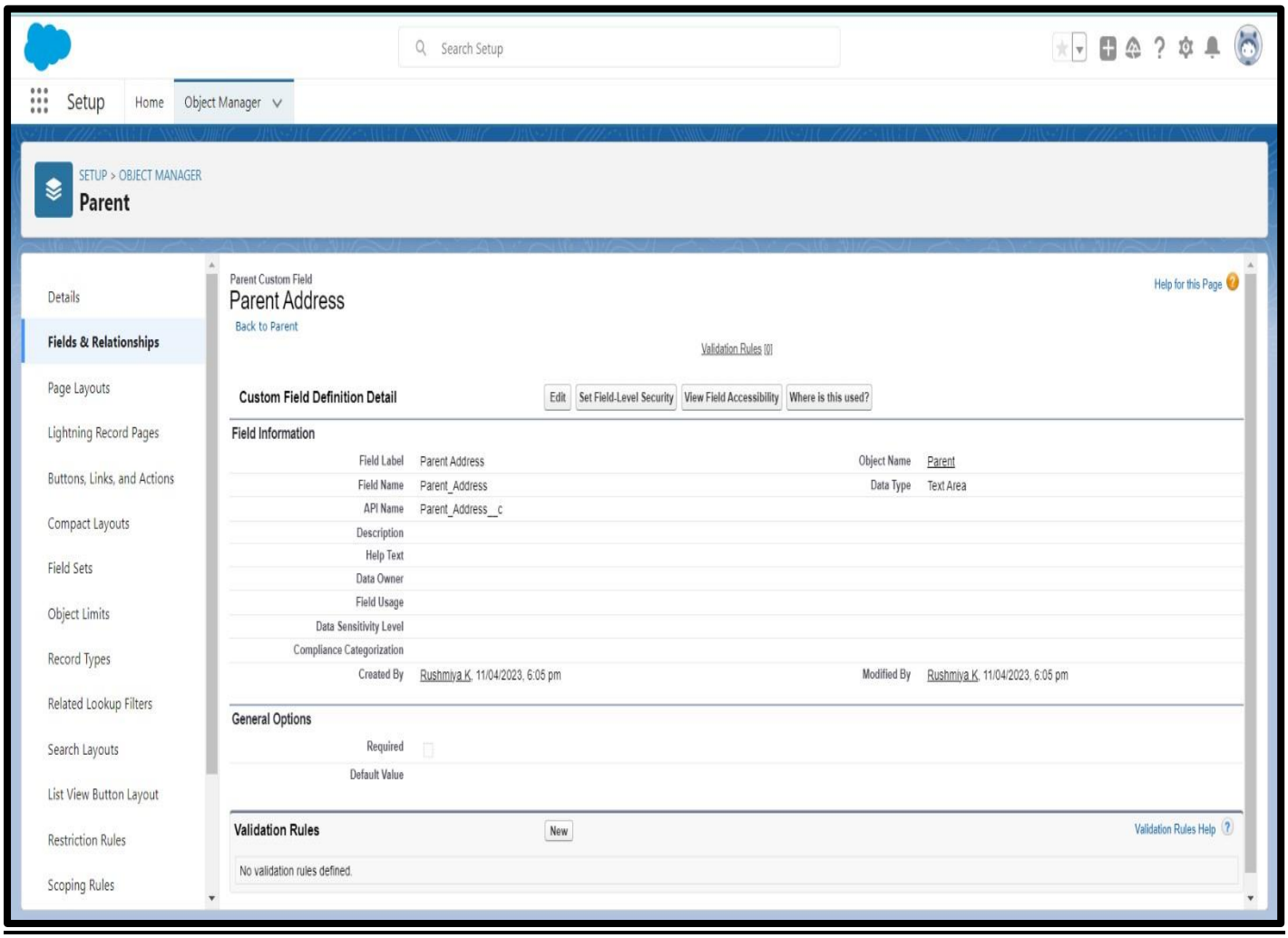
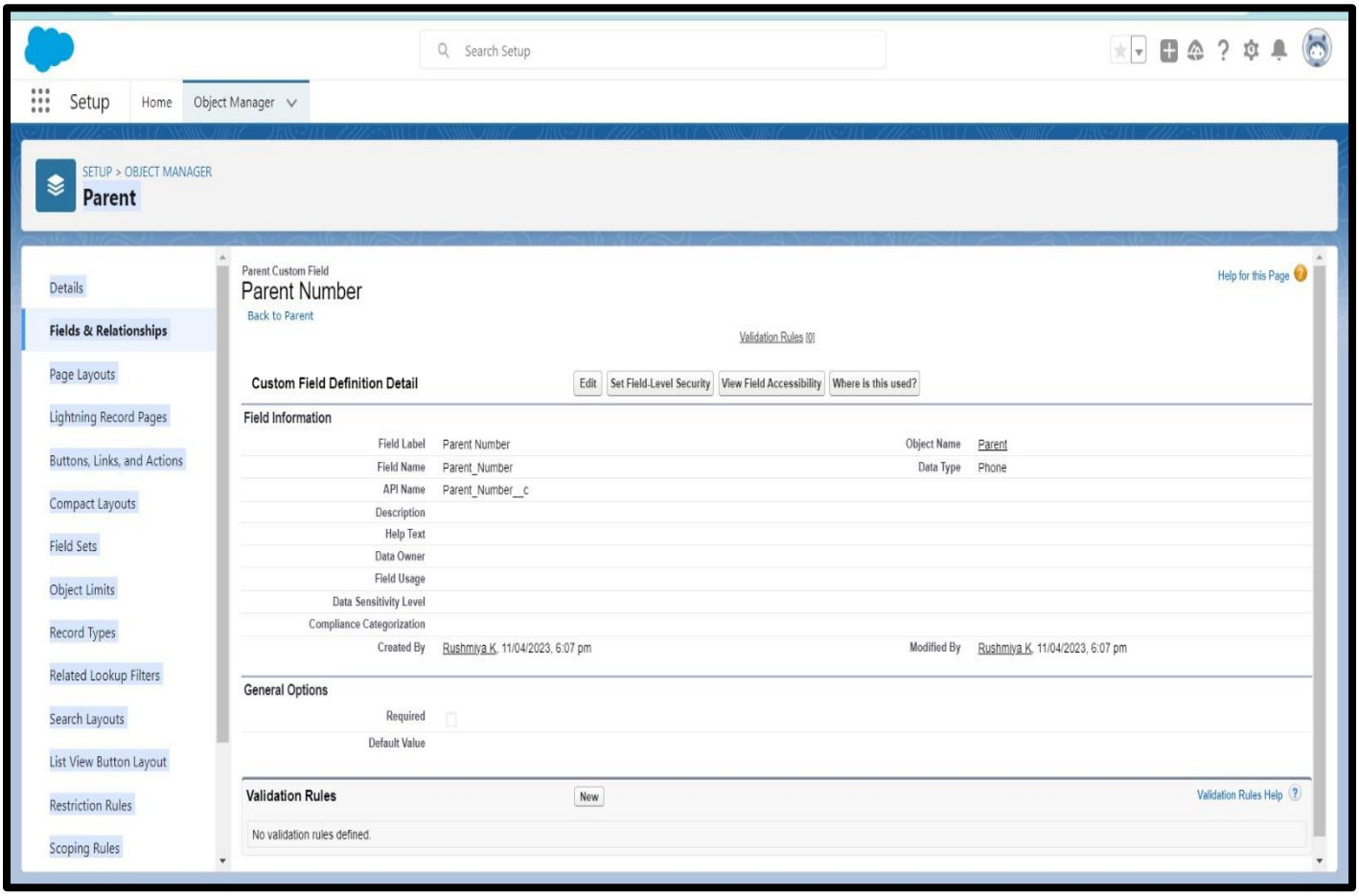
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Students Custom Field
Marks
Back to Students
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Marks
Object Name Students
Field Name Marks
Data Type Number
API Name Marks__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Rushmiya K, 11/04/2023, 6:03 pm
Modified By Rushmiya K, 11/04/2023, 6:03 pm
General Options
Required
Unique
External ID
AI Prediction
Default Value

ACTIVITY-3

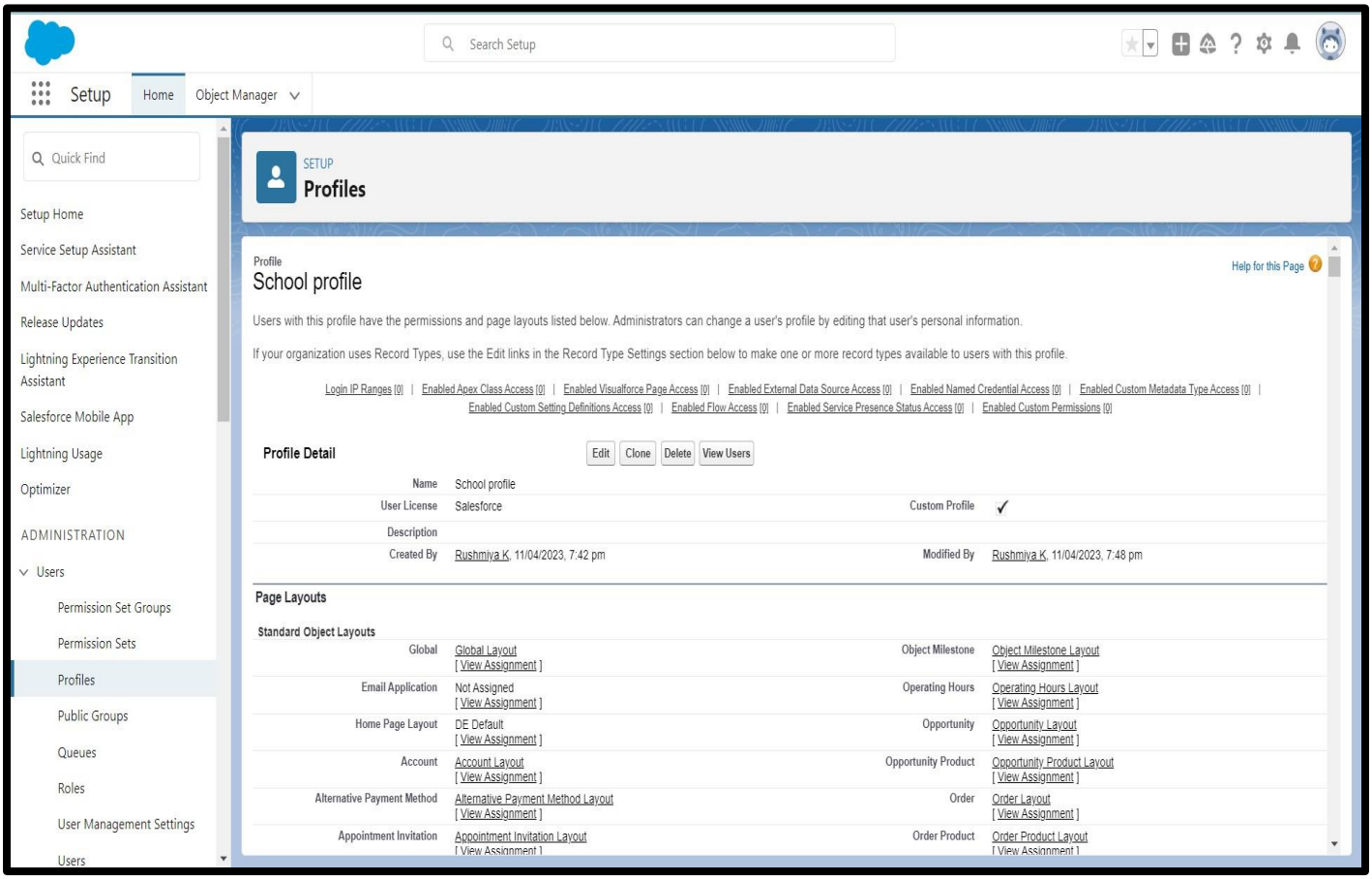

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Parent
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Parent Custom Field
Parent Address
Back to Parent
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Parent Address
Object Name Parent
Field Name Parent_Address
Data Type Text Area
API Name Parent_Address__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Rushmiya K, 11/04/2023, 6:05 pm
Modified By Rushmiya K, 11/04/2023, 6:05 pm
General Options
Required
Default Value
Validation Rules
New
Validation Rules Help
No validation rules defined.



MILESTONE-5

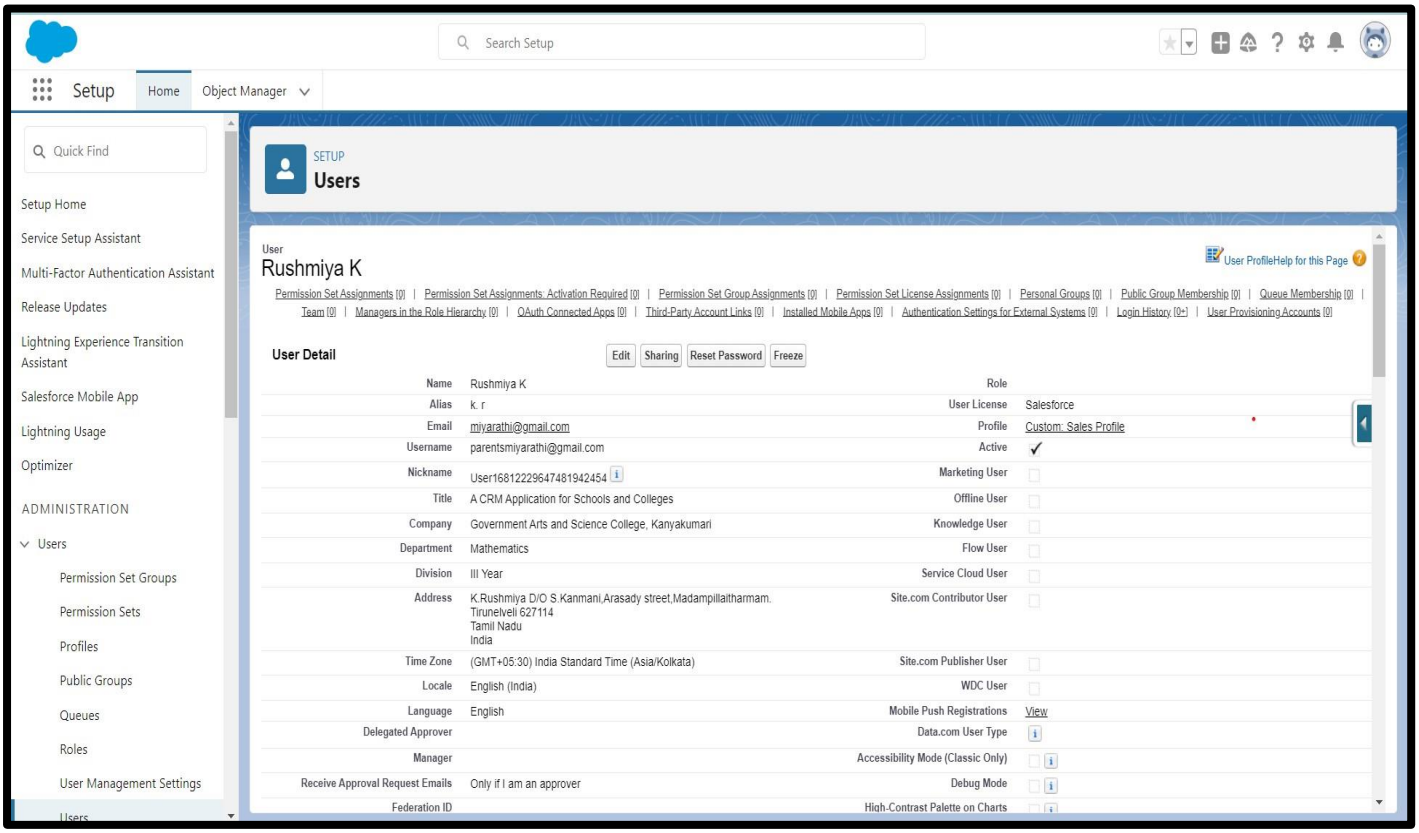
ACTIVITY

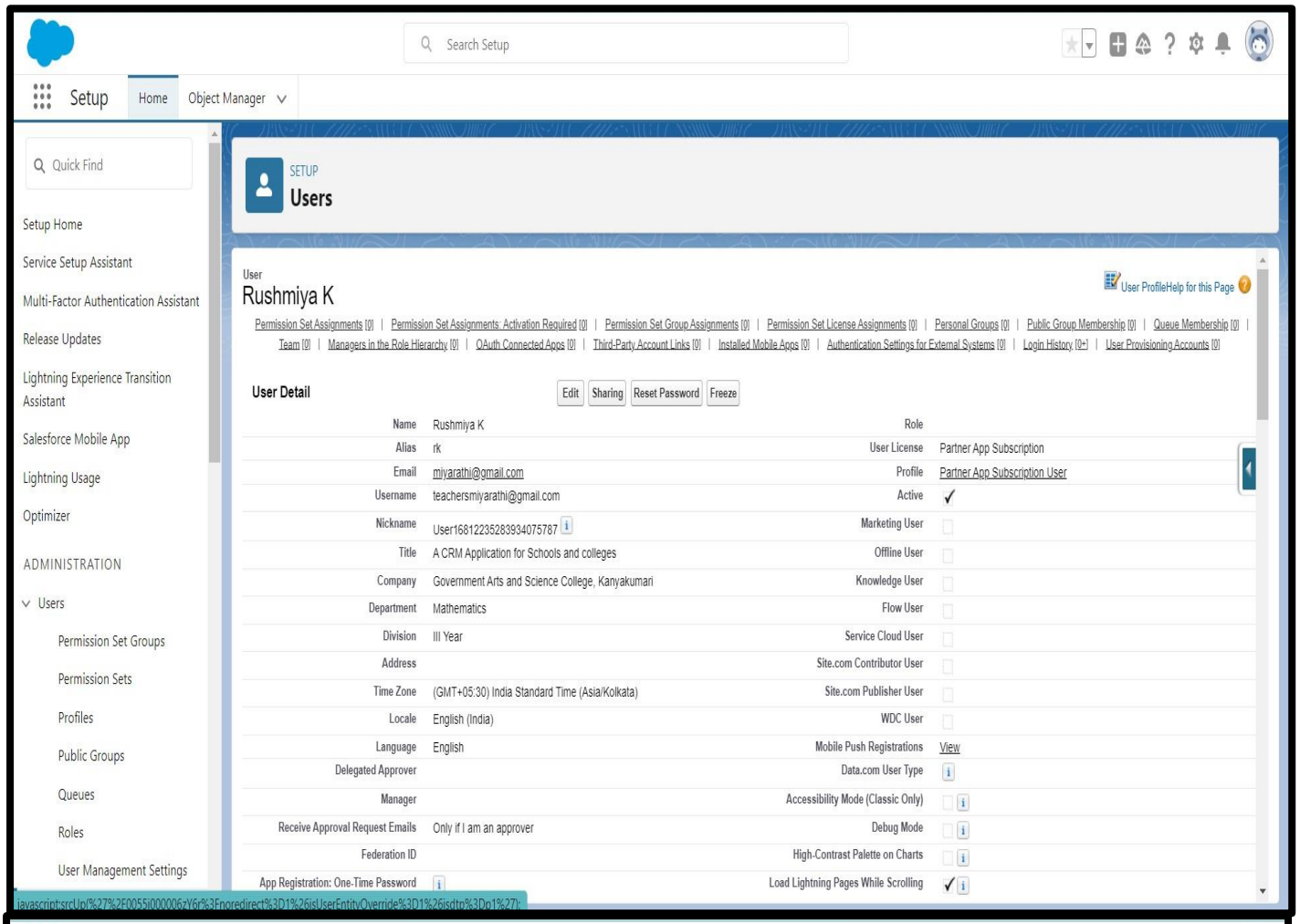
Creation on profile:

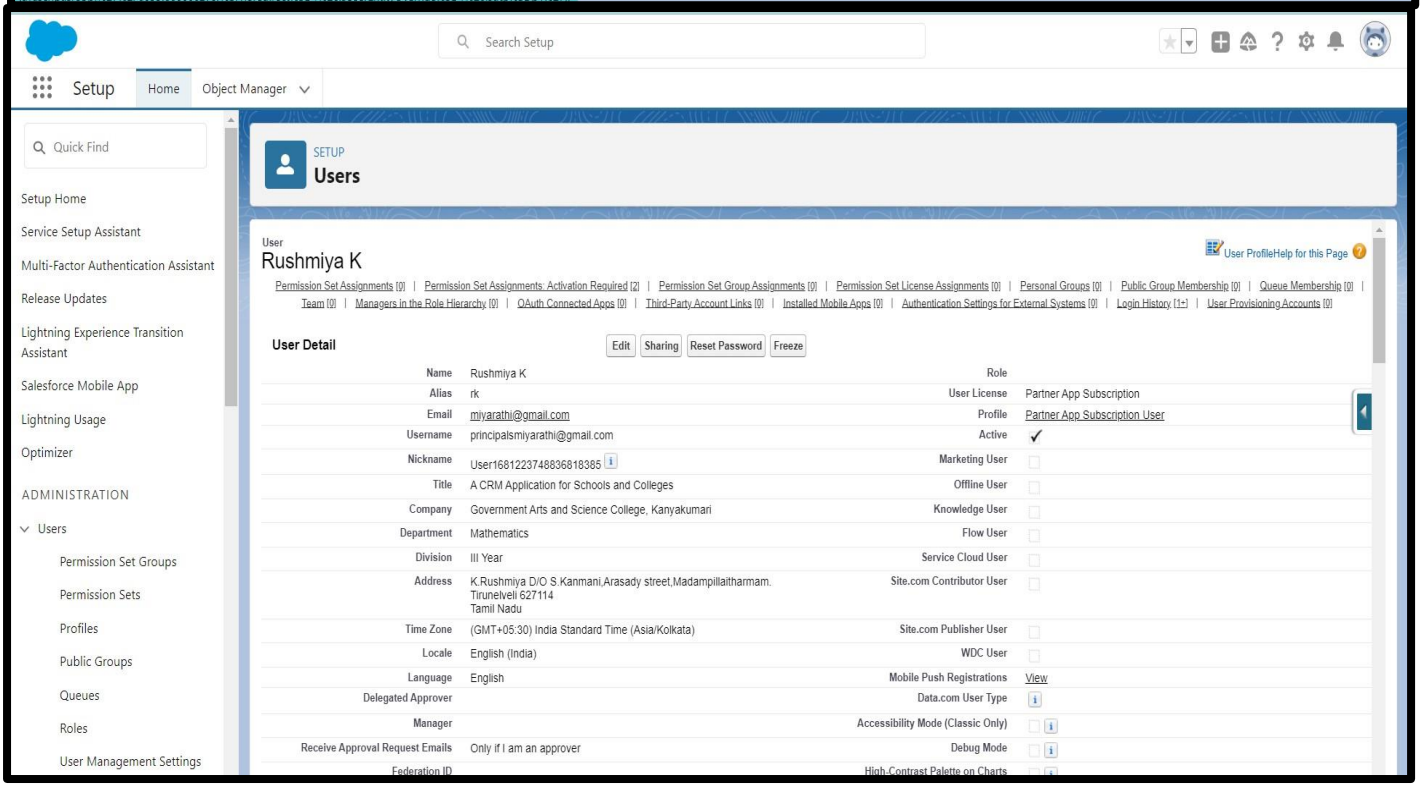


MILESTONE-6 USERS ACTIVITY:

Creating a Users:







MILESTONE-7 PERMISSION SETS

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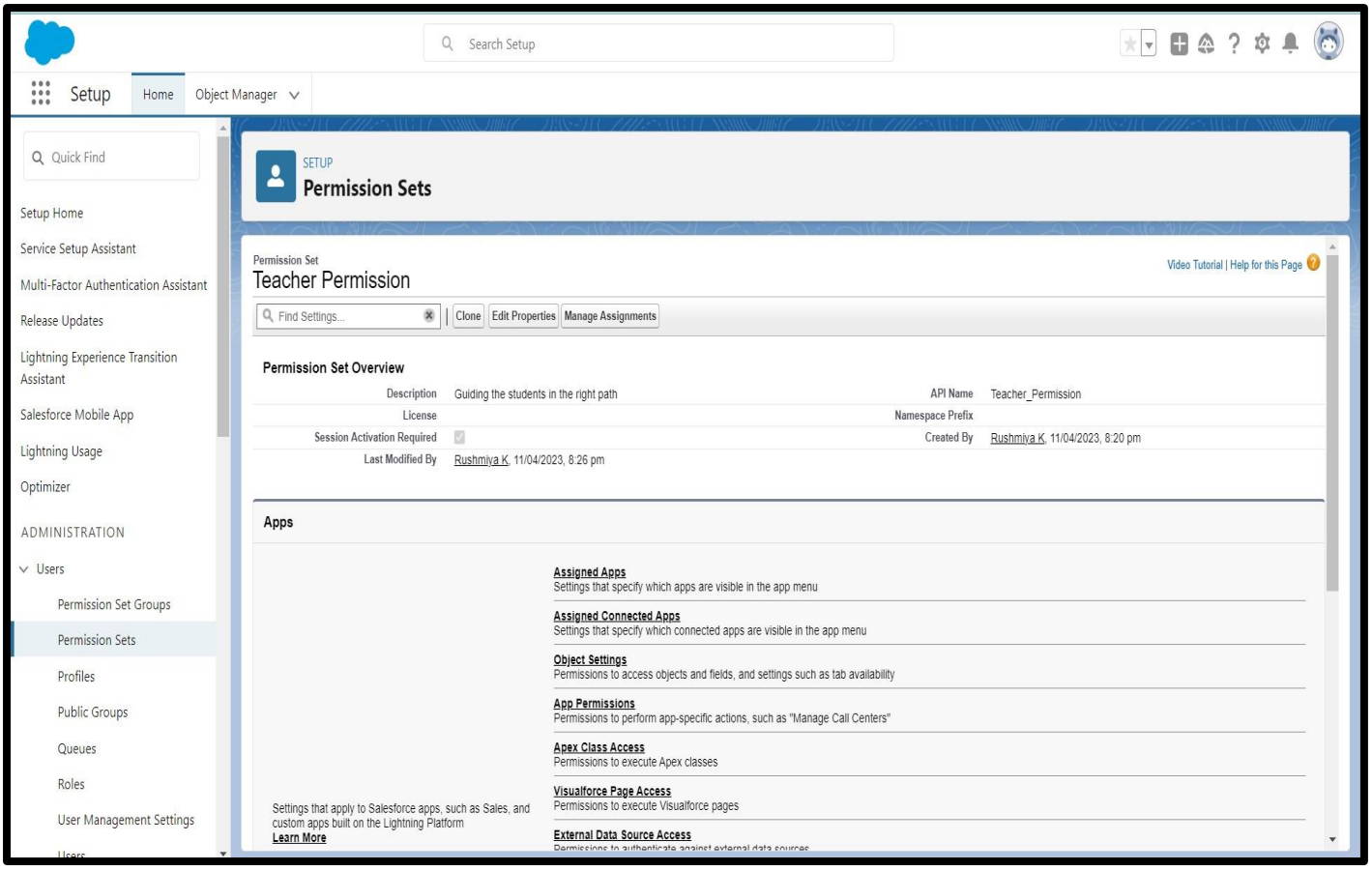
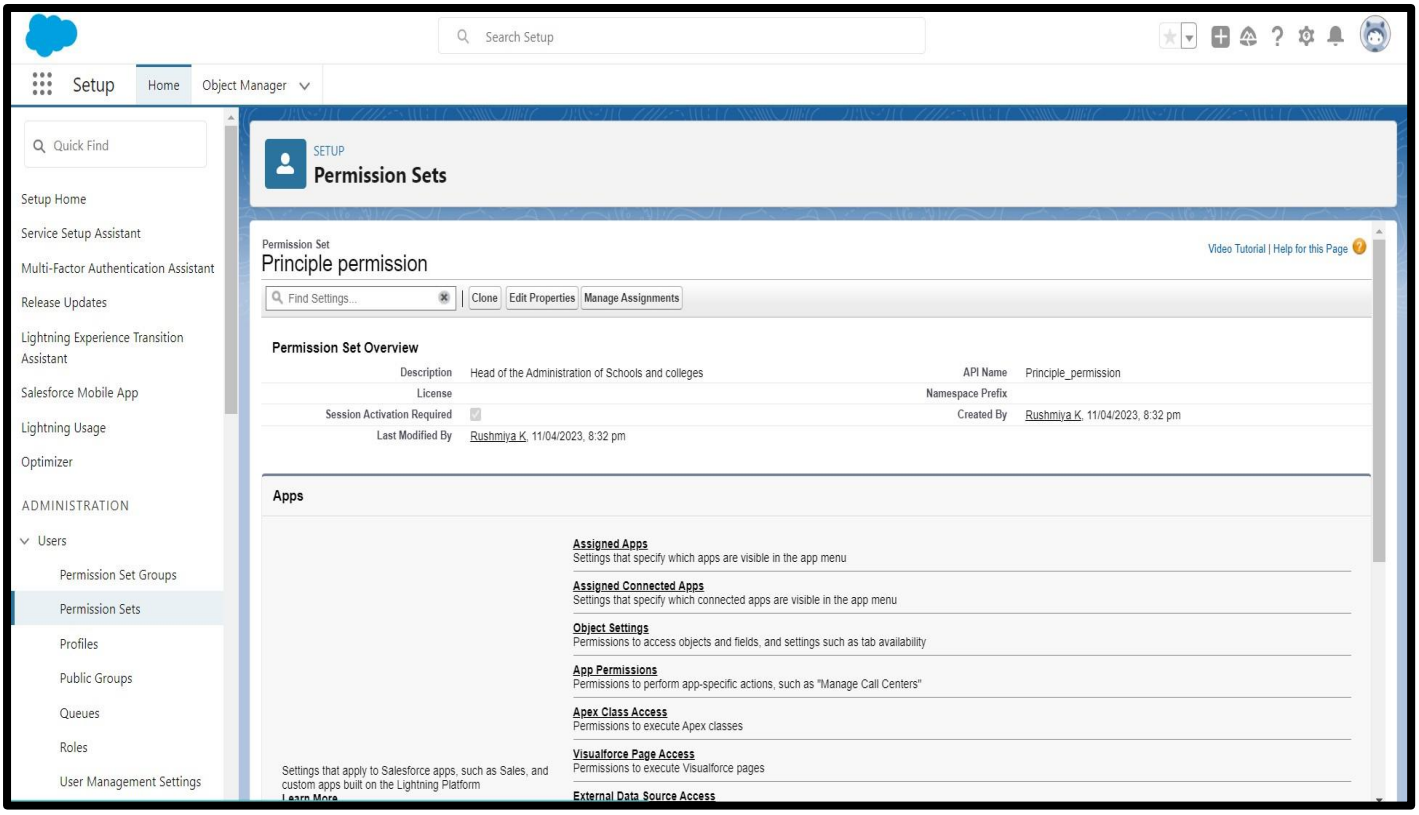
ACTIVITY-1
Permission sets:



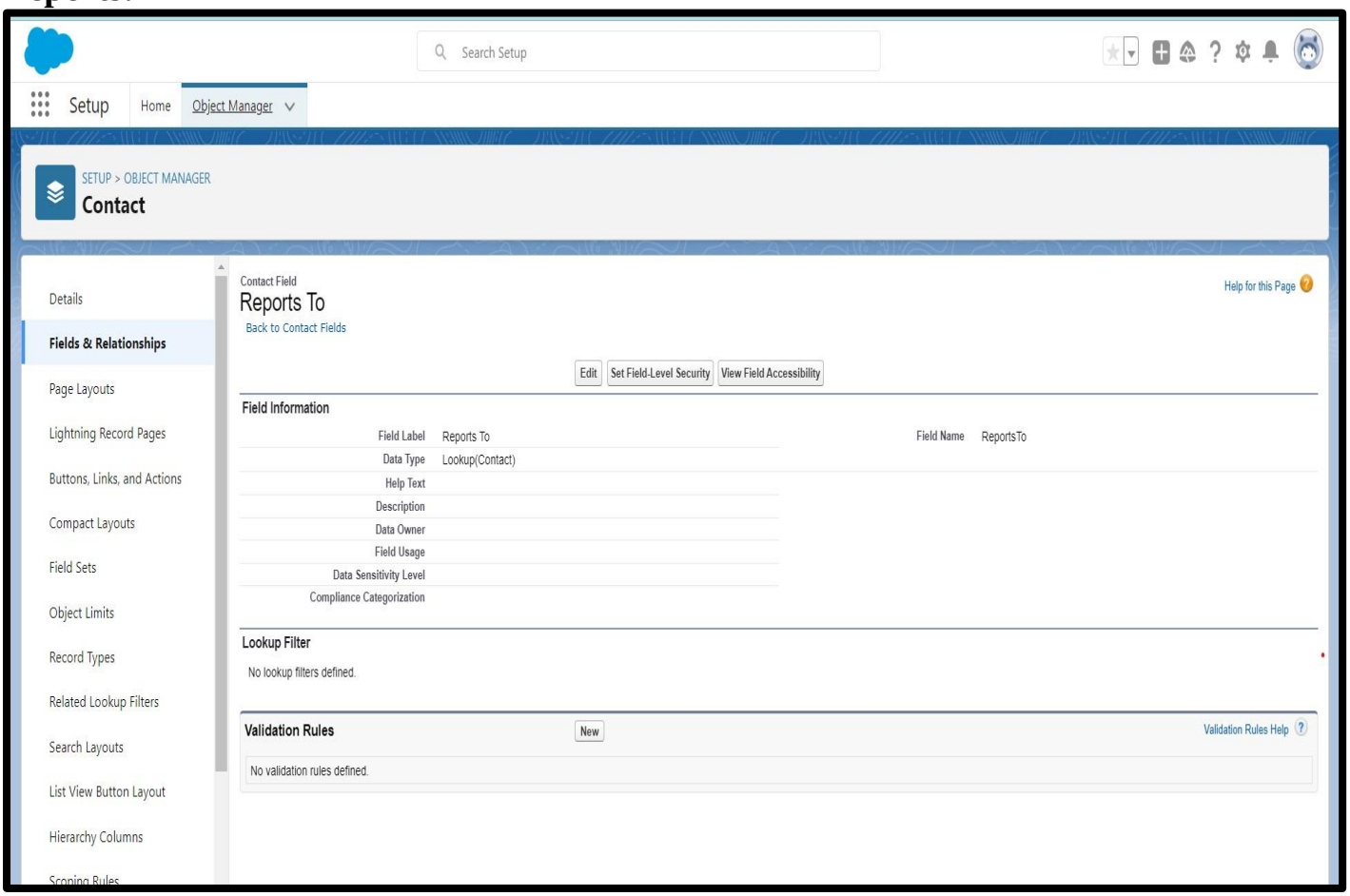
ACTIVITY-2
Permission Sets 2:



MAILSTONE-8: REPORTS

ACTIVITY:

Reports:



4. TRAILHEAD PROFILE PUBLIC URL

- **Team leader : https://trailblazer.me/id/**
- **Team Member 1 : https://trailblazer.me/id/gowts28**
- **Team Member 2 : https://trailblazer.me/id/ssenthilkumar16**
- **Team Member 3 : https://trailblazer.me/id/**

5. ADVANTAGES & DISADVANTAGE:

List of advantages and disadvantages of the proposed solution.

ADVANTAGES	DISADVANTAGES
• Helps the students to improve their knowledge.	• Most of the students doesn't have laptop to do their project.
• Lead a way create job opportunity.	• Internet Problem.
• Makes us to understand the Customer Relationship Management	• Don't have enough time to complete the project.

• Got an idea about Project Development Process.	• Fear to chat with Salesforce Administrator.
• Creating Empathy Map.	• Log in & Sign Up problems.

6. APPLICATIONS:

The area where this solution can be applied.

- ✦ It helps to create and develop new applications (app).
- ✦ Mainly helps to understand the customer mindset, while buying the product.
- ✦ It is also useful in cloud computing.

7. CONCLUSION:

- This project is a great path for the students who is seeking for bright future. This project mainly explains about the Customer Relationship Management.
- A great thankful to the team members of "NaanMudhalvan" who has worked a lot to provide us knowledge. And, again a great thankful to the "Salesforce Administrator" who is responding to our complaints and queries.

8. FUTURE SCOPE:

Today the world is fully computerised, so this project helps us to acquire some knowledge to access applications in the computer.

The world's first billionaire is "Jeff Bezos", who is the owner of the amazon app, because today everything is happening through online, we can bill, shop, transfer money. And everything depends on salesforce and customer relationship management, because while sale a product we should fulfil the customer needs and the customer wants to satisfied, so that the customer will come again to buy a new product. So customer relationship management is much essential in today's world. And this field will have a stunning scope in future.