

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 understand 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 help 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.



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.

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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?

Says to ask the opinion of the experts

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

says if the product is suitable

says which brand we need to buy

The thought of wasting the time

The thought of, whether the product has warranty

The thought of wasting the money

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

The fear of buying a unbranded product

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

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 best product in google

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

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

Does

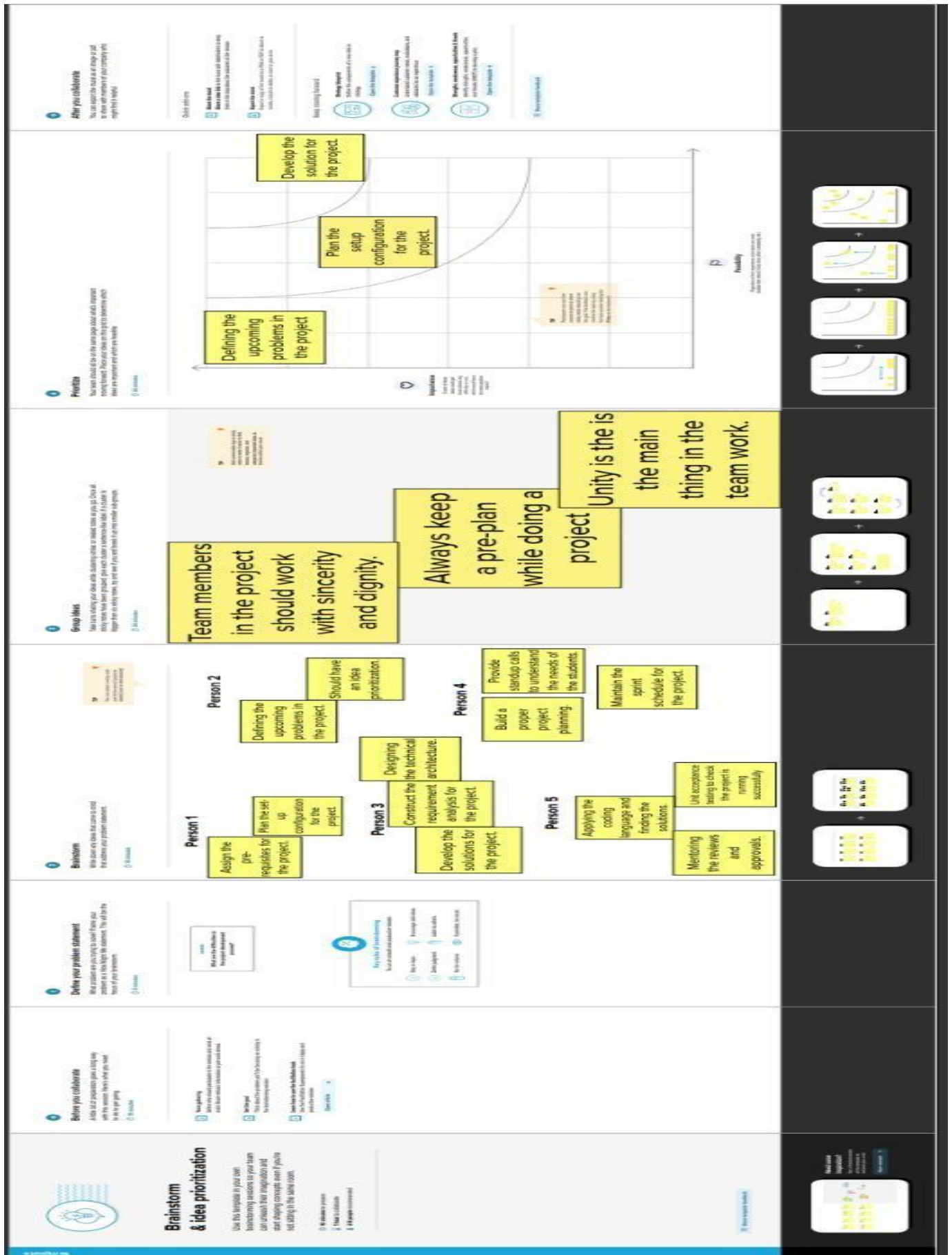
What behavior have we observed?
What can we imagine them doing?

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:

Object name	Fields in the object	
<u>Object 1:</u>	Field label	Data type
	School	Text Area
	Student	Picklist
<u>Object 2:</u>	Field label	Data type
	Parents	Text Area
	Student	Master-detail relationship

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:

The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar contains a list of configuration options: 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, and Scoping Rules. The main content area is titled 'Details' and includes a search bar and 'Edit' and 'Delete' buttons. The object's API Name is 'School__c', and it is a Custom object. The Singular Label is 'School' and the Plural Label is 'Schools'. The object is deployed and has reports enabled. The help settings link to the Standard salesforce.com Help Window.

Field	Value
Description	
API Name	School__c
Custom	✓
Singular Label	School
Plural Label	Schools
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

ACTIVITY 2: Create Student Object:

The screenshot shows the Salesforce Setup interface for the 'Students' object. The left sidebar contains a list of configuration options: 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, and Scoping Rules. The main content area is titled 'Details' and includes a search bar and 'Edit' and 'Delete' buttons. The object's API Name is 'Students__c', and it is a Custom object. The Singular Label is 'Students' and the Plural Label is 'Students'. The object is deployed and has reports enabled. The help settings link to the Standard salesforce.com Help Window.

Field	Value
Description	
API Name	Students__c
Custom	✓
Singular Label	Students
Plural Label	Students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

ACTIVITY 3: Create Parent Object:

The screenshot shows the Salesforce Setup interface for configuring the 'Parent' object. The left sidebar lists various configuration options, with 'Related Lookup Filters' currently selected. The main area displays the 'Details' for the 'Parent' object, including fields for Description, API Name (Parent_c), Custom (checked), Singular Label (Parent), Plural Label (Parents), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. Edit and Delete buttons are visible in the top right corner.

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

MILESTONE-3: LIGHTNING APP

ACTIVITY: Create the School Management App:

The screenshot shows the Salesforce Lightning App Builder interface for configuring the 'School Management' app. The left sidebar lists various configuration options, with 'App Details & Branding' currently selected. The main area displays the 'App Details & Branding' section, including fields for App Name (School Management), Developer Name (Rushmiya), and Description (Schools, Students, Reports, and Dashboards). The 'App Branding' section shows the Primary Color Hex Value (#0070D2) and the 'Org Theme Options' checkbox (checked). The 'App Launcher Preview' section shows a preview of the app icon and name.

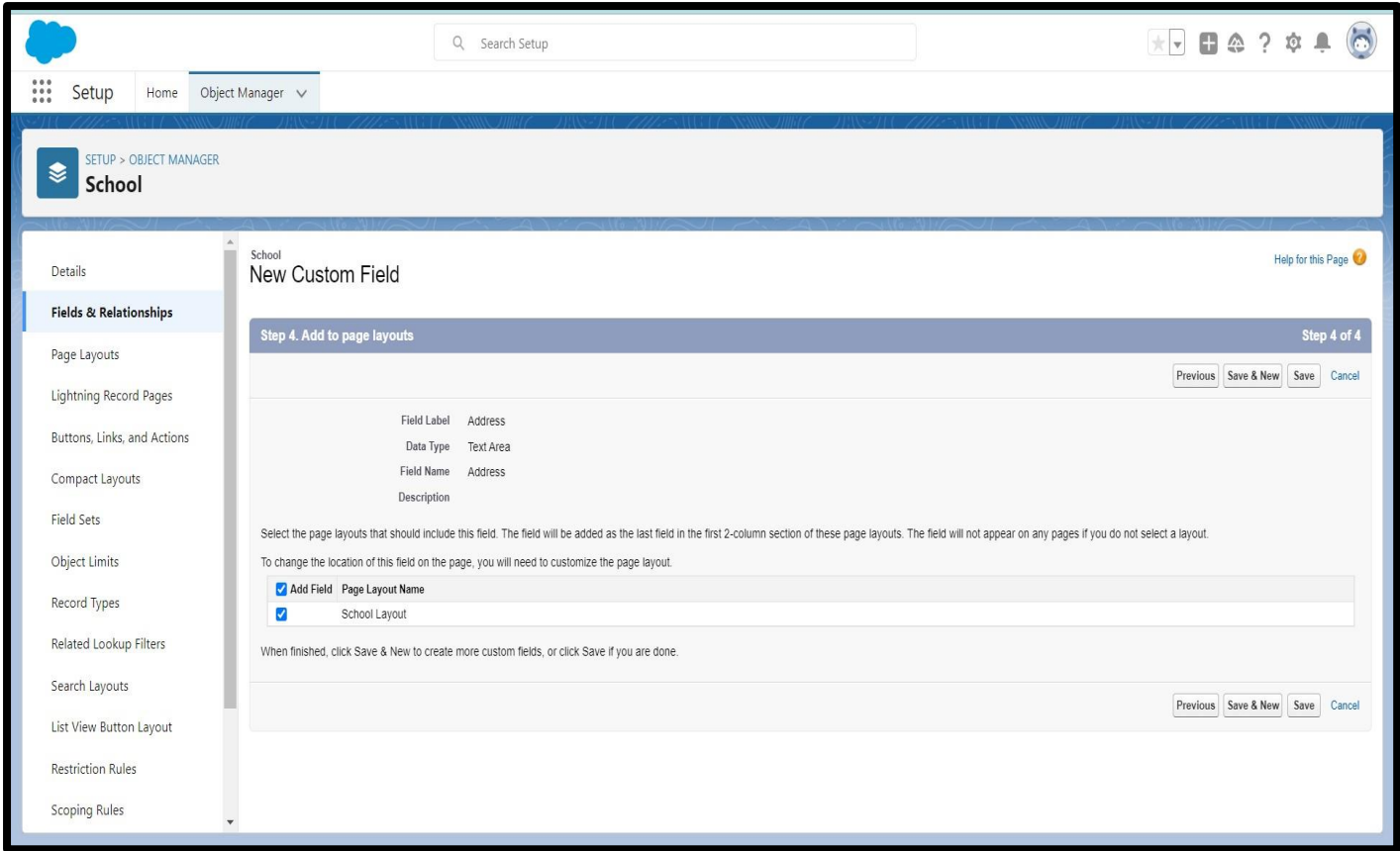
Field	Value
* App Name	School Management
* Developer Name	Rushmiya
Description	Schools, Students, Reports, and Dashboards
Primary Color Hex Value	#0070D2
Org Theme Options	<input checked="" type="checkbox"/> Use the app's image and color instead of the org's custom theme

App Launcher Preview: SM School Management
Schools, Students, Reports, and Dashboards

MILESTONE-4: FIELDS AND RELATIONSHIP

ACTIVITY-1

Creation of fields for the School objects:



Setup

Home

Object Manager

school webs

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

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	Object Name	School
Field Name	School_websites	Data Type	Text Area
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	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.

Setup

Home

Object Manager

Search Setup

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

Field Information

Field Label	Phone Number	Field Name	Phone
Data Type	Phone		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

ACTIVITY-2:

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and a navigation bar with "Setup", "Home", and "Object Manager". Below this, the breadcrumb trail reads "SETUP > OBJECT MANAGER" and "Students". The left sidebar contains a menu with "Details" (selected), "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", and "Scoping Rules".

The main content area is titled "Students Custom Field Results" with a "Back to Students" link. It includes a "Validation Rules (0)" link. Below this is the "Custom Field Definition Detail" section with tabs for "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?".

The "Field Information" section contains the following details:

Field Label	Results	Object Name	Students
Field Name	Results	Data Type	Picklist
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	Modified By	Rushmiya K, 11/04/2023, 6:01 pm

The "General Options" section includes:

- Required: ☐
- Default Value:

The "Picklist Options" section includes:

- Restrict picklist to the values defined in the value set: ☒
- Controlling Field: [\[New\]](#)

ACTIVITY-3

The screenshot displays the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Parent' object. The page title is 'Parent Custom Field' and the specific field being viewed is 'Parent Address'. The left sidebar contains a navigation menu with options like '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', and 'Scoping Rules'. The main content area is titled 'Parent Address' and includes a 'Back to Parent' link. Below this, there are tabs for 'Validation Rules (0)', 'Custom Field Definition Detail', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information. The table includes fields like 'Field Label', 'Field Name', 'API Name', 'Object Name', 'Data Type', 'Description', 'Help Text', 'Data Owner', 'Field Usage', 'Data Sensitivity Level', and 'Compliance Categorization'. The 'Field Information' section shows the following details: Field Label: Parent Address, Field Name: Parent_Address, API Name: Parent_Address__c, Object Name: Parent, Data Type: Text Area. Below this, there are sections for 'General Options' (Required: ☐, Default Value:) and 'Validation Rules' (No validation rules defined). The 'Validation Rules' section includes a 'New' button and a 'Validation Rules Help' link.

Setup > OBJECT MANAGER

Parent

Parent Custom Field

Parent Address

[Back to Parent](#)

[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.

The screenshot displays the Salesforce Setup interface for configuring a custom field named 'Parent Number' for the 'Parent' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled 'Parent Custom Field' and 'Parent Number', with a 'Back to Parent' link. It includes a 'Validation Rules' link and a 'Custom Field Definition Detail' section with buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section lists various field properties: Field Label (Parent Number), Field Name (Parent_Number), API Name (Parent_Number__c), Object Name (Parent), Data Type (Phone), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Rushmiya K, 11/04/2023, 6:07 pm), and Modified By (Rushmiya K, 11/04/2023, 6:07 pm). The 'General Options' section shows 'Required' as an unchecked checkbox and 'Default Value' as an empty field. The 'Validation Rules' section at the bottom indicates 'No validation rules defined.' with a 'New' button and a 'Validation Rules Help' link.

MILESTONE-5

ACTIVITY

Creation on profile:

Setup

Home
Object Manager

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

SETUP

Profiles

Profile
School profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) |
[Enabled Apex Class Access \(0\)](#) |
[Enabled Visualforce Page Access \(0\)](#) |
[Enabled External Data Source Access \(0\)](#) |
[Enabled Named Credential Access \(0\)](#) |
[Enabled Custom Metadata Type Access \(0\)](#) |
[Enabled Custom Setting Definitions Access \(0\)](#) |
[Enabled Flow Access \(0\)](#) |
[Enabled Service Presence Status Access \(0\)](#) |
[Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit
Clone
Delete
View Users

Name	School profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Rushmiya K, 11/04/2023, 7:42 pm	Modified By	Rushmiya K, 11/04/2023, 7:48 pm

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	DE Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Opportunity	Opportunity Layout [View Assignment]
Opportunity Product	Opportunity Product Layout [View Assignment]
Order	Order Layout [View Assignment]
Order Product	Order Product Layout [View Assignment]

MILESTONE-6 USERS ACTIVITY:

Creating a Users:

Setup

Home
Object Manager

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

SETUP

Users

User
Rushmiya K

[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	Rushmiya K	Role	
Alias	k. r	User License	Salesforce
Email	miyarathi@gmail.com	Profile	Custom Sales Profile
Username	parentsmyarathi@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16812229647481942454	Marketing User	<input type="checkbox"/>
Title	A CRM Application for Schools and Colleges	Offline User	<input type="checkbox"/>
Company	Government Arts and Science College, Kanyakumari	Knowledge User	<input type="checkbox"/>
Department	Mathematics	Flow User	<input type="checkbox"/>
Division	III Year	Service Cloud User	<input type="checkbox"/>
Address	K Rushmiya D/O S Kanmani, Arasady street, Madampillatharmam, Tirunelveli 627114, Tamil Nadu, India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

16

A CRM Applications for schools and colleges

ACTIVITY-1

Permission sets:

The screenshot shows the Salesforce Setup interface for the 'Teacher Permission' set. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings). The main content area displays the 'Permission Set Overview' for 'Teacher Permission' with the following details:

Field	Value
Description	Guiding the students in the right path
API Name	Teacher_Permission
License	
Namespace Prefix	
Session Activation Required	<input checked="" type="checkbox"/>
Created By	Rushmiya K. 11/04/2023, 8:20 pm
Last Modified By	Rushmiya K. 11/04/2023, 8:26 pm

Below the overview, the 'Apps' section lists various permission categories:

- 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.

ACTIVITY-2

Permission Sets 2:

The screenshot shows the Salesforce Setup interface for the 'Principle permission' set. The left sidebar is identical to the first screenshot. The main content area displays the 'Permission Set Overview' for 'Principle permission' with the following details:

Field	Value
Description	Head of the Administration of Schools and colleges
API Name	Principle_permission
License	
Namespace Prefix	
Session Activation Required	<input checked="" type="checkbox"/>
Created By	Rushmiya K. 11/04/2023, 8:32 pm
Last Modified By	Rushmiya K. 11/04/2023, 8:32 pm

Below the overview, the 'Apps' section lists various permission categories:

- 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.

MAILSTONE-8: REPORTS

ACTIVITY:

Reports:

The screenshot shows the Salesforce Setup interface for the 'Contact' object. The left sidebar contains a navigation menu with options like 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, Hierarchy Columns, and Scoping Rules. The main content area is titled 'Contact Field Reports To' and includes a 'Back to Contact Fields' link. There are three buttons: 'Edit', 'Set Field-Level Security', and 'View Field Accessibility'. The 'Field Information' section shows a table with columns 'Field Label' and 'Field Name'. The 'Field Label' column contains 'Reports To' and 'Data Type' contains 'Lookup(Contact)'. The 'Field Name' column contains 'ReportsTo'. The 'Lookup Filter' section shows 'No lookup filters defined.' The 'Validation Rules' section shows 'No validation rules defined.' and a 'New' button.

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
<ul style="list-style-type: none"> • Helps the students to improve their knowledge. 	<ul style="list-style-type: none"> • Most of the students doesn't have laptop to do their project.
<ul style="list-style-type: none"> • Lead a way create job opportunity. 	<ul style="list-style-type: none"> • Internet Problem.
<ul style="list-style-type: none"> • Makes us to understand the Customer Relationship Management 	<ul style="list-style-type: none"> • 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.