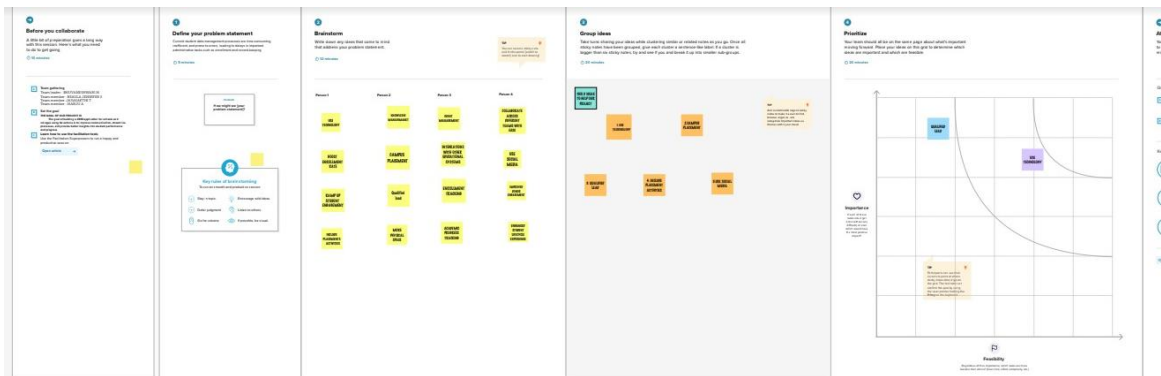


2.2 IDEATION & BRAINSTORMING MAP :



3 . RESULT

3.1 DATA MODEL :

Object name	Fields in the Object	
School	Fieldlabel	Data type
	Address	Text Area
	District	Text Area
	State	Text Area
	School Website	Text Area
	Phone Number	Phone
	Number of Students	Roll – up summary
	Highest Marks	Roll – up summary
Student	Fieldlabel	Data type
	Phone Number	Phone
	School	Master – Detail Relationship
	Results	Pick List
	Class	Number
	Marks	Number

Parent		
	Fieldlabel	Data type
	Parent Address	Text Area
	Parent Number	Phone

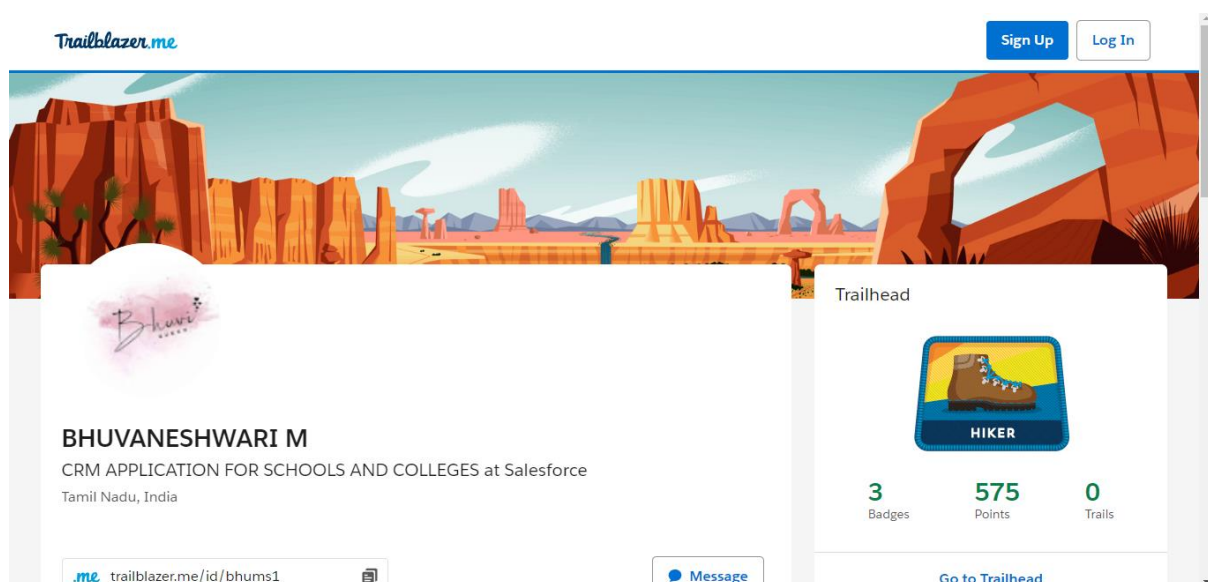
3.2 ACITIVITY & SCREENSHOT :

DESCRIPTION :

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.

MILESTONE-1 :

ACTIVITY : CREATING DEVELOPER ACCOUNT

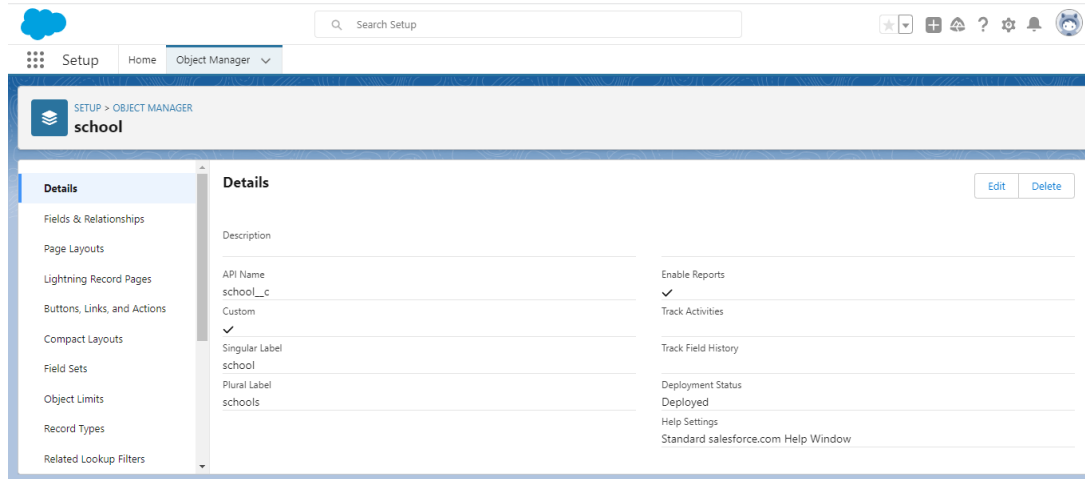


DESCRIPTION :

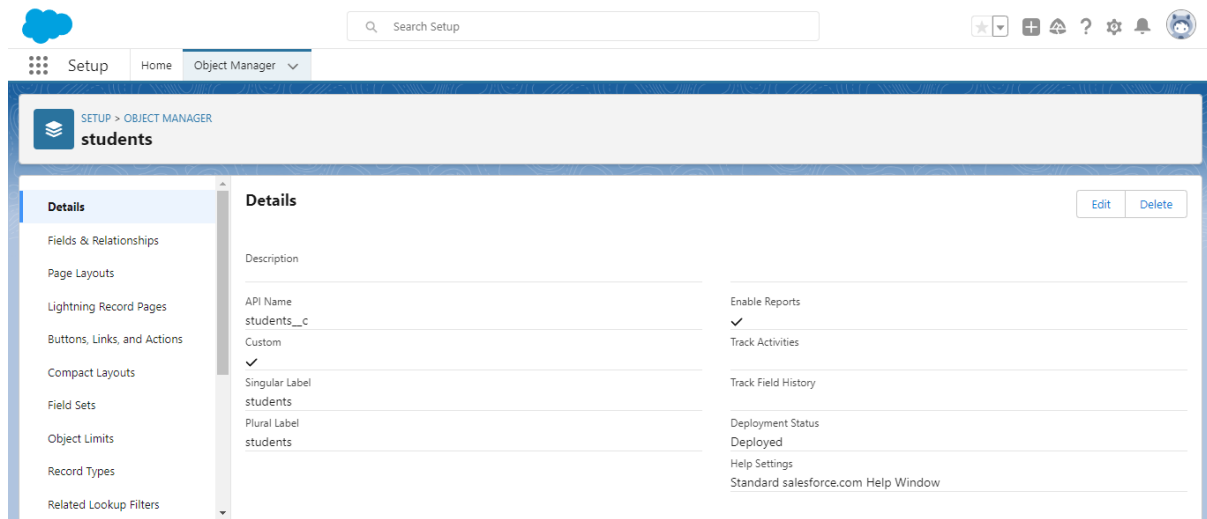
publishing account issued to Developers that enables the distribution of Products via the Market.

MILESTONE-2 : OBJECT

ACTIVITY-1 : CREATION OF SCHOOL OBJECT



ACTIVITY 2 :CREATE STUDENT OBJECT



ACTIVITY 3 : CREATE PARENT OBJECT

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is active, showing a list of objects on the left. The 'parent' object is selected, and its details are displayed on the right. The details include a description, API Name (parent__c), Custom checkbox (checked), Singular Label (parent), Plural Label (parents), Enable Reports (checked), Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), Help Settings, and a link to the Standard Salesforce.com Help Window. There are 'Edit' and 'Delete' buttons at the top right of the details section.

MILESTONE-3 : LIGHTNING APP

ACTIVITY :

CREATE THE SCHOOL MANAGEMENT APP

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'A CRM APPLICATION FOR SCHOOLS AND COLLEGE'. The 'App Settings' section is active, and the 'App Details & Branding' sub-section is selected. The 'App Details' section contains fields for 'App Name' (A CRM APPLICATION FOR SCHOOLS AND COLLEGE), 'Developer Name' (A_CRM_APPLICATION_FOR_SCHOOLS_AND_COLLEGE), and 'Description' (Enter a description...). The 'App Branding' section includes an 'Image' upload button, a 'Primary Color Hex Value' dropdown (set to #0070D2), and an 'Org Theme Options' checkbox (unchecked). The 'App Launcher Preview' section shows a preview of the app launcher with a blue square icon containing 'AC' and the text 'A CRM APPLICATION FOR ...'.

MILESTONE – 4 : FIELDS AND RELATIONSHIP

ACTIVITY-1 :

CREATION OF FIELDS FOR THE SCHOOL OBJECTS :

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

school

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX students)		
Last Modified By	LastModifiedById	Lookup(User)		
Number Of Students	Number_Of_Students__c	Roll-Up Summary (COUNT students)		
Owner	OwnerId	Lookup(User,Group)	✓	
Phone Number	Phone_Number__c	Phone		
School	School__c	Text Area(255)		

ACTIVITY -2 :

CREATIN OF FIELDS FOR THE STUDENT OBJECTS :

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

students

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
school	school__c	Master-Detail(school)		✓
student Name	Name	Text(80)		✓

ACTIVITY – 3 :

CREATION OF FIELDS FOR THE PARENT OBJECTS :

The screenshot shows the Salesforce Setup interface. 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, and Search Layouts. The main content area is titled 'Fields & Relationships' for the 'parent' object, showing 6 items sorted by Field Label. The table lists fields with their labels, names, data types, controlling fields, and indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
parent name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

MILESTONE – 5 : PROFILE

ACTIVITY :

CREATION ON PROFILE :

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar has a search bar for 'PROFILES' and a list of users. The main content area displays the 'Standard User' profile. It includes a 'Profile Detail' section with fields for Name, User License, Created By, and Modified By. Below this is the 'Page Layouts' section, which lists various layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Object Milestone, Operating Hours, Opportunity, and Opportunity Product.

Profile Detail

Field	Value
Name	Standard User
User License	Salesforce
Created By	BHUVANESHWARI M. 09/04/2023, 4:13 pm
Modified By	BHUVANESHWARI M. 12/04/2023, 11:10 am

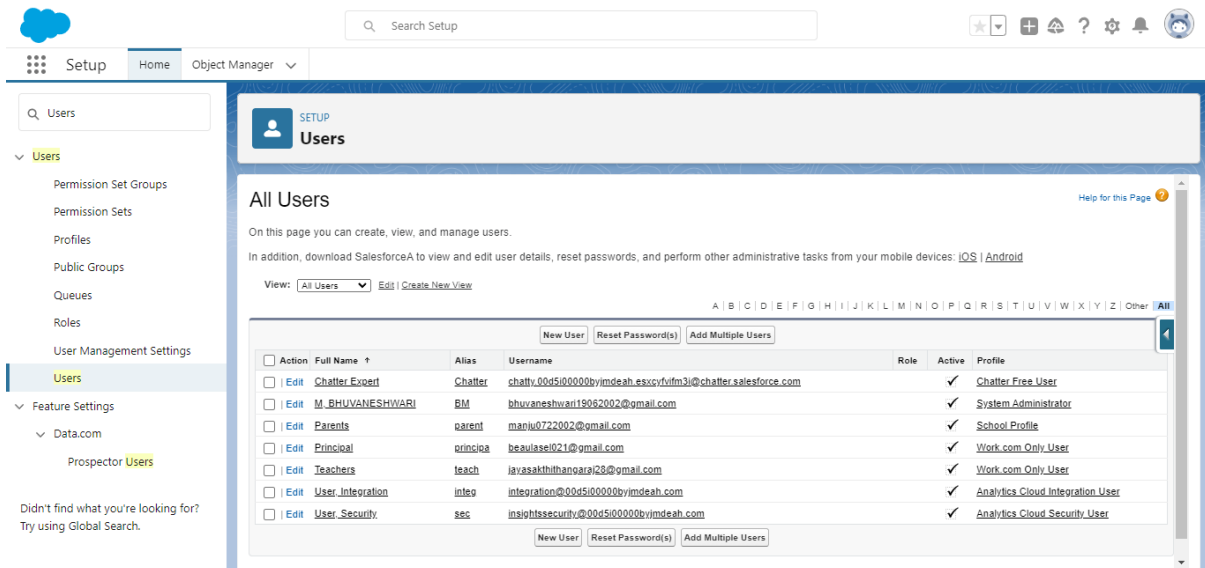
Page Layouts

Layout Type	Layout Name	View Assignment
Global	Global Layout	[View Assignment]
Email Application	Not Assigned	[View Assignment]
Home Page Layout	DE Default	[View Assignment]
Account	Account 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]

MILESTONE – 6 : USERS

ACTIVITY :

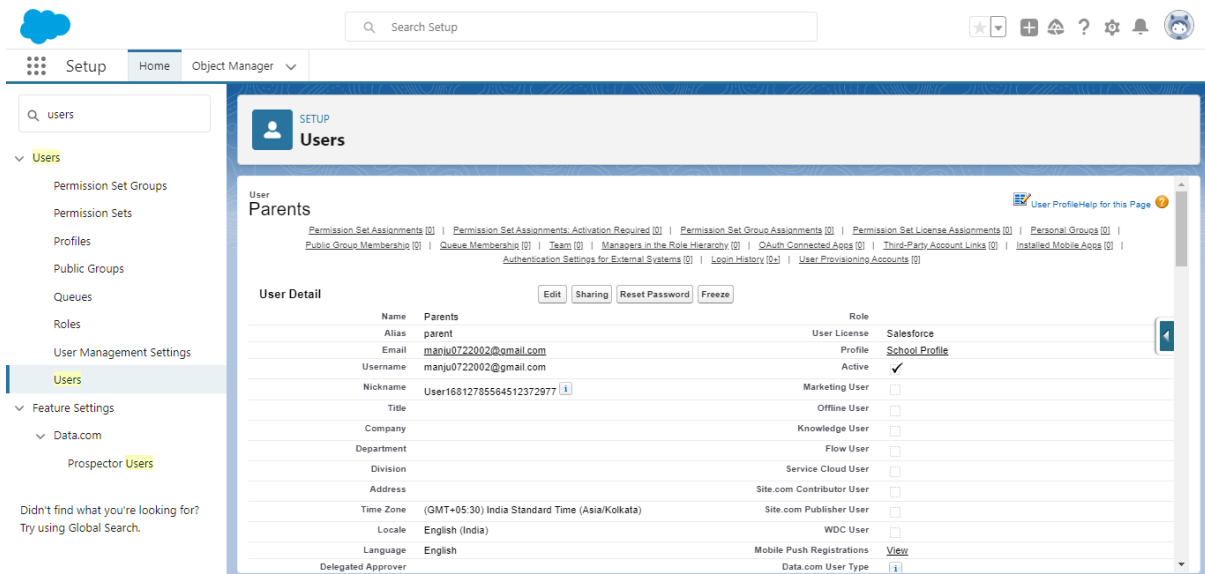
CREATING A USERS :



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, M. BHUVANESHWARI, Parents, Principal, Teachers, User Integration, and User Security.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d5i00000bvimdeah_escvufm3l@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	M. BHUVANESHWARI	BM	bhuvaneshwari19062002@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	Parents	parent	manju0722002@gmail.com		✓	School Profile
<input type="checkbox"/> Edit	Principal	principal	beaulasei021@gmail.com		✓	Work.com Only User
<input type="checkbox"/> Edit	Teachers	teach	javasakthilhangara12@gmail.com		✓	Work.com Only User
<input type="checkbox"/> Edit	User Integration	inteo	integration@00d5i00000bvimdeah.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d5i00000bvimdeah.com		✓	Analytics Cloud Security User

PARENTS :



The screenshot shows the Salesforce Setup interface for a specific user. The left sidebar is the same as the previous screenshot. The main content area is titled 'User Detail' for the user 'Parents'. It includes a 'User Profile' section with a 'User License' of 'Salesforce' and a 'Profile' of 'School Profile'. Below this is a 'User Detail' section with a table of user information.

Name	Parents	Role
Alias	parent	User License
Email	manju0722002@gmail.com	Profile
Username	manju0722002@gmail.com	Active
Nickname	User16812785564512372977	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type

TEACHERS :

The screenshot shows the Salesforce Setup interface. On the left, the 'Users' menu is expanded, showing options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The 'Users' option is highlighted. The main content area displays the 'User Detail' for a user named 'Teachers'. The user's email is 'jayasakthihangaraj28@gmail.com' and their username is 'jayasakthihangaraj28@gmail.com'. The user is active and has the role 'Work.com Only User'. The user's profile is 'Marketing User'. The user's address is 'User16812786944826534847'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's mobile push registrations are visible as 'View'.

PRINCIPAL :

The screenshot shows the Salesforce Setup interface. On the left, the 'Users' menu is expanded, showing options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The 'Users' option is highlighted. The main content area displays the 'User Detail' for a user named 'Principal'. The user's email is 'beaulase021@gmail.com' and their username is 'beaulase021@gmail.com'. The user is active and has the role 'Work.com Only User'. The user's profile is 'Marketing User'. The user's address is 'User16812787533328722469'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's mobile push registrations are visible as 'View'.

MILESTONE – 7 : PREMISSION SETS

ATIVITY 1 :

PERMISSION SETS -1 : TEACHERS PERMISSION

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like 'Users', 'Permission Set Groups', 'Permission Sets', 'Feature Settings', 'Digital Experiences', 'Sales', 'Accounts', 'Person Accounts', 'Salesforce Scheduler', 'Assignment Policies', 'Salesforce Scheduler Settings', 'Scheduling Policies', and 'Skills'. The main content area is titled 'Permission Sets' and displays the configuration for a 'Teachers Permission' set. The 'Permission Set Overview' section includes fields for Description, License, API Name (Teachers_Permission), Namespace Prefix, Session Activation Required (unchecked), Created By (BHUVANESHWARI M), and Last Modified By (BHUVANESHWARI M) on 12/04/2023 at 11:24 am. Below this, the 'Apps' section lists various permission categories: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access.

ACTIVITY – 2 :

PERMISSION SETS -2 : PRINCIPAL PERMISSION

This screenshot displays the 'Principal Permission' configuration in the Salesforce Setup interface. The layout is identical to the previous one, but the main content area shows the details for the 'Principal Permission' set. The 'Permission Set Overview' section indicates that the API Name is 'Principal_Permission' and it was created by 'BHUVANESHWARI M' on 12/04/2023 at 11:26 am. The 'Apps' section at the bottom lists the same categories of permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access.

MILESTONE – 8 REPORTS

Report: schools with students
New schools with students Report

Enable Field Editing | Add Chart | Edit

school: school Name ↑	fx Number Of Students	fx Highest Marks
<input type="checkbox"/> Ashram Higher Secondary School (1)	400	-
Subtotal	400	100.00
<input type="checkbox"/> Corporation Girls High School (1)	400	-
Subtotal	400	100.00
<input type="checkbox"/> Government Higher Secondary School (1)	400	-
Subtotal	400	100.00
<input type="checkbox"/> PSG Sarvajana School (1)	400	-
Subtotal	400	100.00
<input type="checkbox"/> RKV Higher Secondary School (1)	400	-
Subtotal	400	100.00
Total (5)	2,000	100.00

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

4. TRAILBLAZER PROFILE PUBLIC URL

TEAM LEAD - <https://trailblazer.me/id/bhums1>

TEAM MEMBER 1 - trailblazer.me/id/2jennifers

TEAM MEMBER 2 - trailblazer.me/id/2jayasakthi

TEAM MEMBER 3 - trailblazer.me/id/20bpa

5. ADVANTAGES & DISADVANTAGES :

ADVANTAGES :

- Improve Student Admissions Lifecycle.
- Track Student Life-Cycles Within the Institution.
- Keep Alumni Information Safe and Accessible.
- Stay Connected with Teams.
- Monitor Fee Payments and Reminders.
- Reduction in the cost of expenses.
- Improving the quality of service.
- Improving the organization management process.
- History of work with each student .
- Relevant and visual MIS analytics reports.
- Planning and multitasking.

DISADVANTAGES :

- Limited access to data
- Lesser means to assess and improve customer satisfaction
- Miss opportunities to upsell and cross-sell
- Inefficiently attract and retain customers
- Juggling between multiple tools
- Spending several man-hours on manual data entry
- Accessing Contacts or Deals on the go

6. APPLICATIONS :

- Student Recruitment
- Admissions Management
- Student Engagement
- Fundraising
- Alumni Relations
- Faculty/Staff Management

7 . CONCLUSION :

CRM applications for schools and colleges are designed to help institutions manage their relationships with students, parents, and other stakeholders. These applications typically include features for managing student information, tracking enrollment and admissions, managing financial aid and scholarships, and communicating with students and parents. They may also include tools for tracking student performance, managing schedules and calendars, and providing analytics and reporting on student and institutional data. Some of the key benefits of CRM applications for schools and colleges include increased efficiency, improved communication, and better student outcomes

8. future scope :

Customer Relationship Management (CRM) applications for schools and colleges have a promising future. With the increasing demand for personalized education, CRM applications can help educational institutions to manage relationships with their students, faculty, and other stakeholders effectively. These applications can assist in tracking student progress, managing communication with parents and alumni, and automating administrative tasks such as scheduling and record-keeping. Moreover, with the integration of artificial intelligence and machine learning, CRM applications can provide valuable insights

to improve student engagement and learning outcomes. As educational institutions continue to prioritize student success, CRM applications will play an essential role in enhancing the overall educational experience.

TEAM LEAD	:	BHUVANESHWARI.M
TEAM MEMBER 1	:	BEAULA JENNIFER.S
TEAM MEMBER 2	:	JAYASAKTHI.T
TEAM MEMBER 3	:	MANJU.A

