

CRM APPLICATION FOR SCHOOL / COLLEGE

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

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

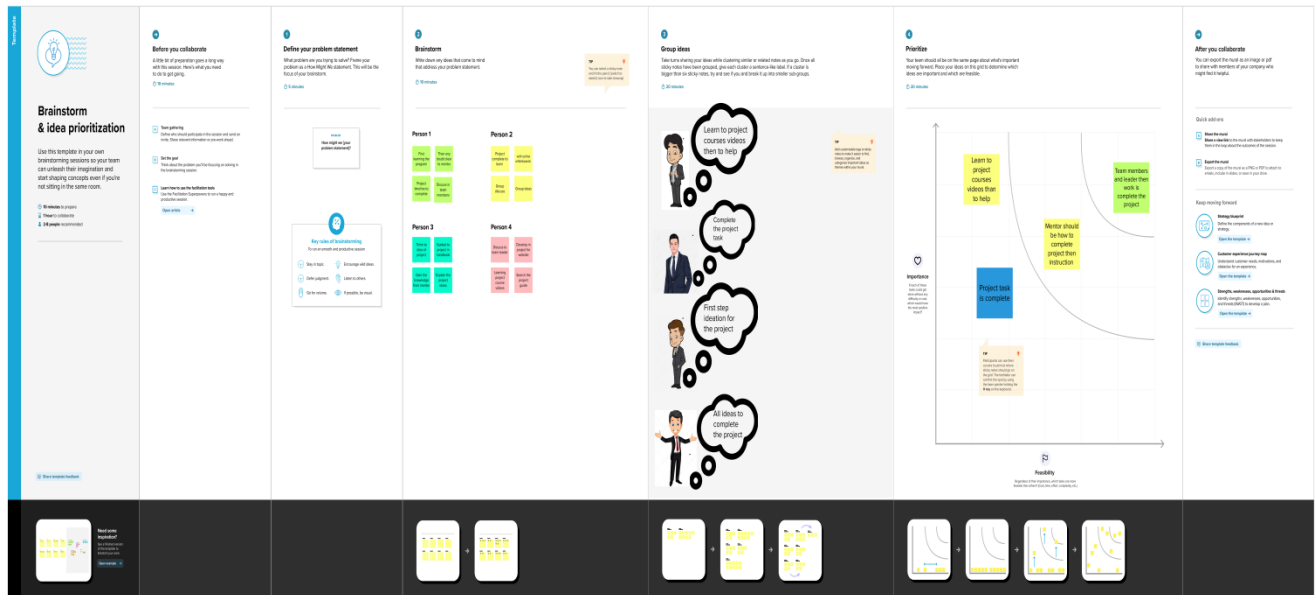
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

2 Problem Definition & Design Thinking

2.1 Empathy map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model

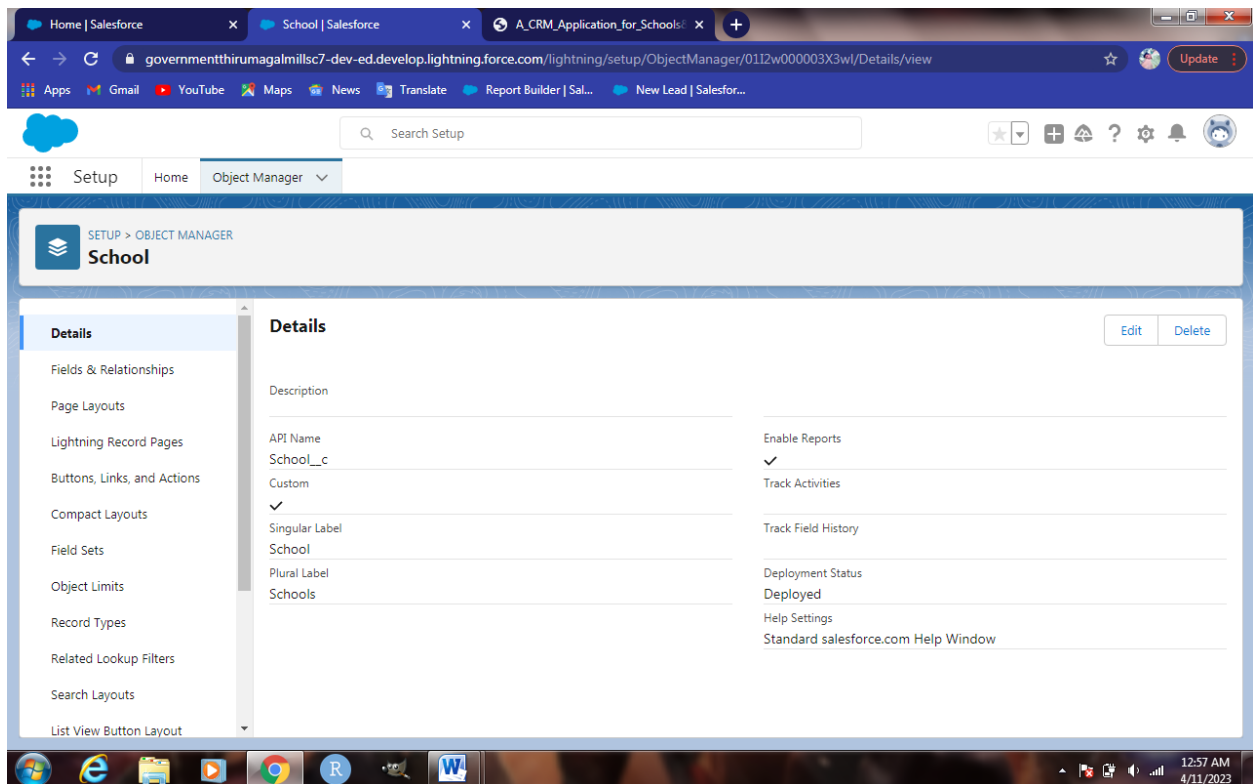
Object name	Field in the Object
Object 1 School	Field label
	Data type
	Address
	Text Area
	Phone Number
Object 2 Student	Phone
	Number of students
	Roll-up-summary
	Highest mark
	Roll-up-summary

Object 3 Parent	Field label	Data type
	Parent Address	Text Area
	Parent Number	Phone

Milestone-1:Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Activity-1: Creation of School Object



Activity 2: Create student object

The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar contains a navigation menu with options: 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 'Details' and includes a description field, API Name (Student__c), Custom checkbox (checked), Singular Label (Student), Plural Label (Students), Enable Reports checkbox (checked), Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The top navigation bar shows 'Setup > OBJECT MANAGER' and 'Student'. The bottom status bar indicates the time as 12:59 AM on 4/11/2023.

Activity 3: Create parent object

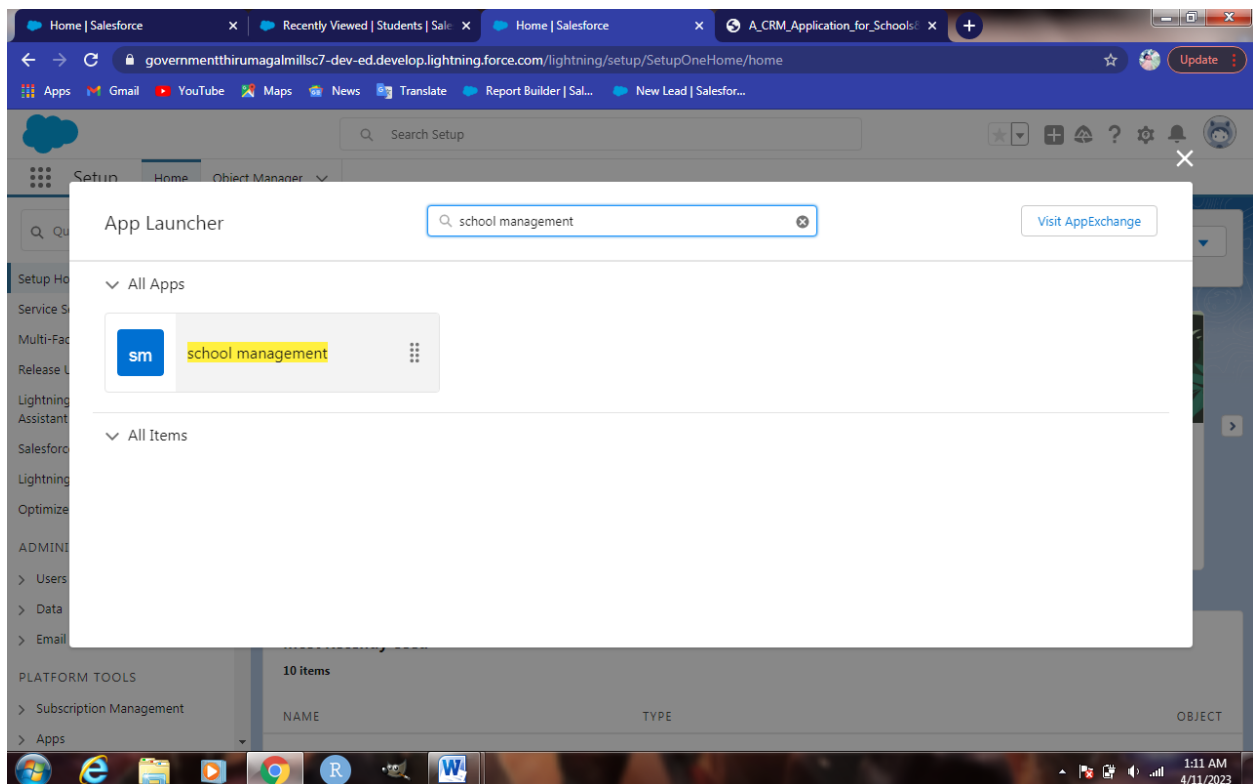
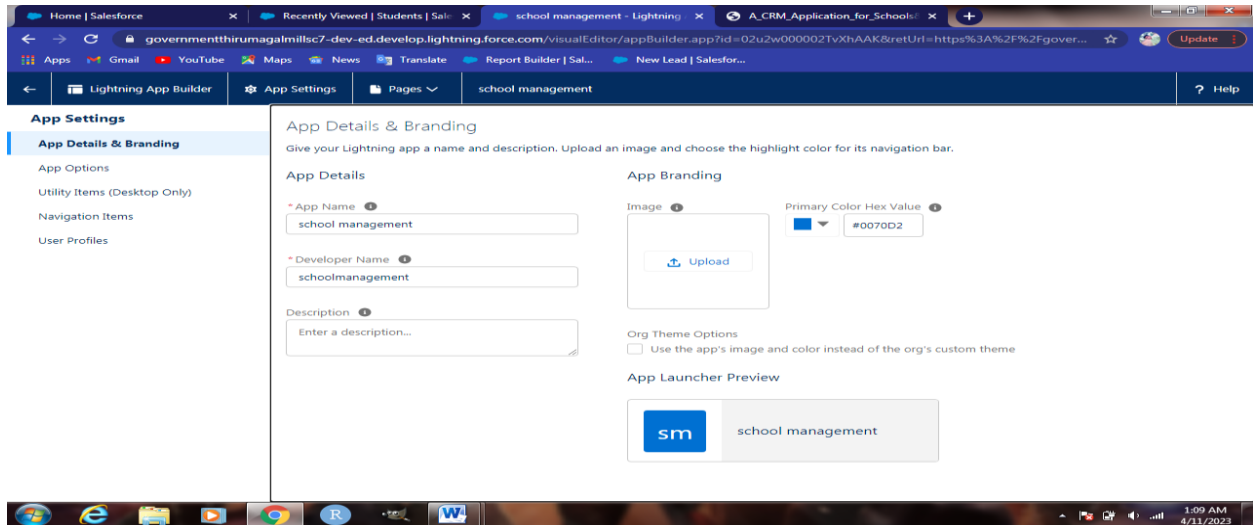
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Details' and includes a description field, API Name (Parent__c), Custom checkbox (checked), Singular Label (Parent), Plural Label (Parents), Enable Reports checkbox (checked), Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The top navigation bar shows 'Setup > OBJECT MANAGER' and 'Parent'. The bottom status bar indicates the time as 1:02 AM on 4/11/2023.

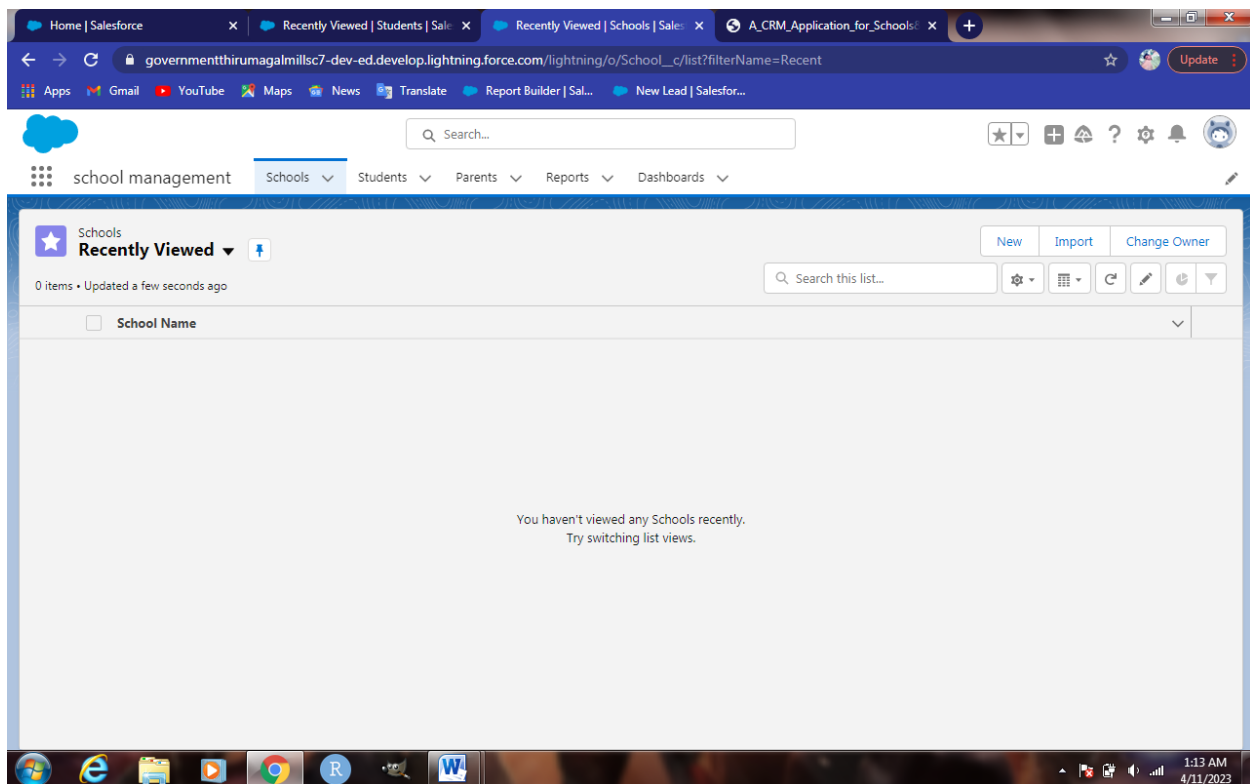
Milestone-2:Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs

Activity:

Create the School Management app





Milestone -3:Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1:

Creation of fields for the School objects:

Address:



Phone Number

The screenshot shows the Salesforce Setup interface for a custom field named 'Phone Number'. The browser address bar indicates the URL: `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003X3wl/FieldsAndRelationships/00N2w00000XXlh9/vi...`. The left sidebar shows the 'Object Manager' menu with 'Fields & Relationships' selected. The main content area displays the 'Custom Field Definition Detail' for 'Phone Number'. The field information table shows the following details:

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	Duraisingam V. 15/03/2023, 3:27 pm	Modified By	Duraisingam V. 15/03/2023, 3:27 pm

The 'General Options' section shows the 'Required' checkbox is unchecked. The 'Default Value' field is empty.

Number of students:

The screenshot shows the Salesforce Setup interface for a custom field named 'Number of students'. The browser address bar indicates the URL: `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003X3wl/FieldsAndRelationships/00N2w00000...`. The left sidebar shows the 'Object Manager' menu with 'Fields & Relationships' selected. The main content area displays the 'Custom Field Definition Detail' for 'Number of students'. The field information table shows the following details:

Field Label	Number of students	Object Name	School
Field Name	Number_of_students	Data Type	Number
API Name	Number_of_students__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Duraisingam V. 15/03/2023, 3:41 pm	Modified By	Duraisingam V. 15/03/2023, 3:41 pm

The 'General Options' section shows the 'Required', 'Unique', and 'External ID' checkboxes are all unchecked.

Highest Marks:

The screenshot shows the Salesforce Setup interface for a custom field named 'Highest marks' on the 'School' 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, and List View Button Layout. The main content area is titled 'School Custom Field: Highest marks' and includes a 'Back to School' 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' table lists details such as Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and Created By. The 'General Options' section includes a 'Required' checkbox and a 'Default Value' field. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

Field Information		Object Name	Data Type
Field Label	Highest marks	School	Percent
Field Name	Highest_marks		
API Name	Highest_marks__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Duraisingam V. 15/03/2023, 3:45 pm	Modified By	Duraisingam V. 15/03/2023, 3:45 pm

Activity-2:

Creation of fields for the Student objects:

Phone number:

The screenshot shows the Salesforce Setup interface for a custom field named 'Phone Number' on the 'Student' 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, and List View Button Layout. The main content area is titled 'Student Custom Field: Phone Number' and includes a 'Back to Student' 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' table lists details such as Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and Created By. The 'General Options' section includes a 'Required' checkbox and a 'Default Value' field. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

Field Information		Object Name	Data Type
Field Label	Phone Number	Student	Phone
Field Name	Phone_Number		
API Name	Phone_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Duraisingam V. 15/03/2023, 3:53 pm	Modified By	Duraisingam V. 15/03/2023, 3:53 pm

School:

The screenshot shows the Salesforce Setup interface for a custom field named 'School'. 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, and List View Button Layout. The main content area is titled 'Student Custom Field School' and includes a 'Back to Student' link. Below this, there are tabs for 'Custom Field Definition Detail', '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, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The 'Field Information' section shows the following details:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
School	School	School__c							Duraisingam V. 15/03/2023, 3:56 pm	Duraisingam V. 15/03/2023, 3:56 pm

Below the table, there are 'Master-Detail Options' including 'Related To', 'Related List Label', 'Sharing Setting', 'Child Relationship Name', and 'Read/Write' permissions. The 'Read/Write' permission is set to 'Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'

Results:

The screenshot shows the Salesforce Setup interface for a custom field named 'Results'. 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, and List View Button Layout. The main content area is titled 'Student Custom Field Results' and includes a 'Back to Student' link. Below this, there are tabs for 'Custom Field Definition Detail', '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, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The 'Field Information' section shows the following details:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
Results	Results	Results__c							Duraisingam V. 15/03/2023, 3:58 pm	Duraisingam V. 15/03/2023, 3:58 pm

Below the table, there are 'General Options' including 'Required' (checkbox) and 'Default Value' (text input).

Class:

The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), 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 'Student Custom Field Class' and includes a 'Back to Student' 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' table lists details for the 'Class' field: Field Label (Class), Field Name (Class), API Name (Class__c), Object Name (Student), Data Type (Number), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Duraiasingam V. on 15/03/2023 at 3:59 pm), and Modified By (Duraiasingam V. on 15/03/2023 at 3:59 pm). The 'General Options' section shows 'Required' and 'Unique' checkboxes, both of which are unchecked.

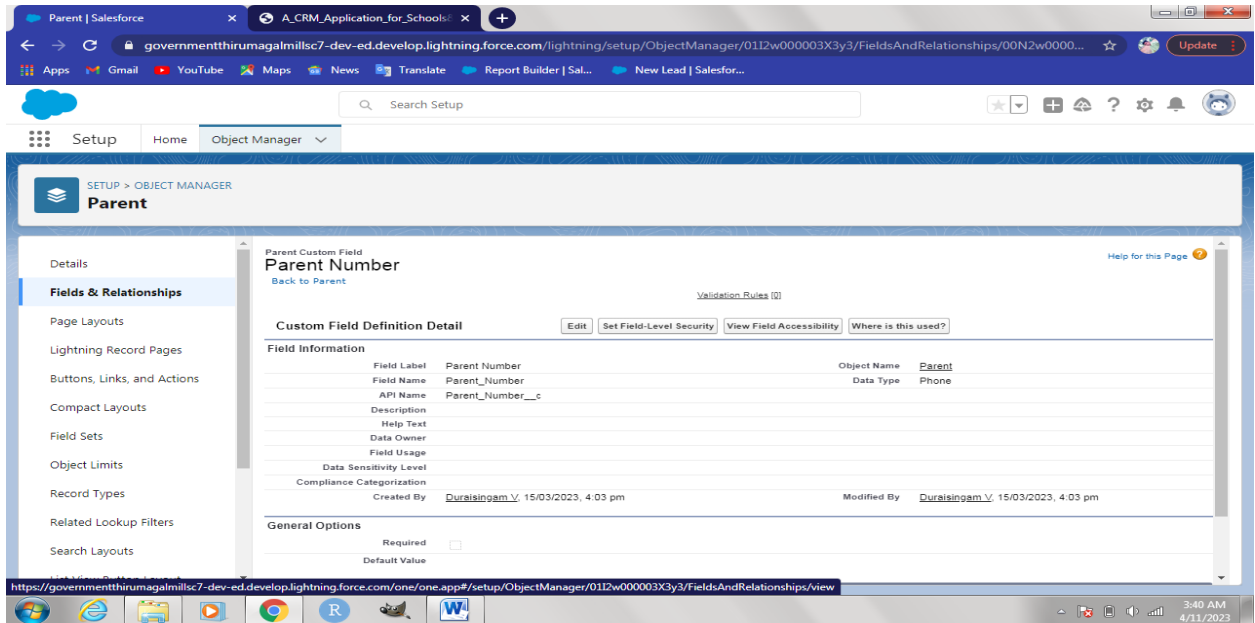
Activity-3:

Creation of fields for the Parent objects:

Parent Address:

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), 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 'Parent Custom Field Parent address' and includes a 'Back to Parent' 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' table lists details for the 'Parent address' field: Field Label (Parent address), Field Name (Parent address), API Name (Parent_address__c), Object Name (Parent), Data Type (Text Area), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Duraiasingam V. on 15/03/2023 at 4:02 pm), and Modified By (Duraiasingam V. on 15/03/2023 at 4:02 pm). The 'General Options' section shows 'Required' and 'Default Value' checkboxes, both of which are unchecked.

Parent Number:

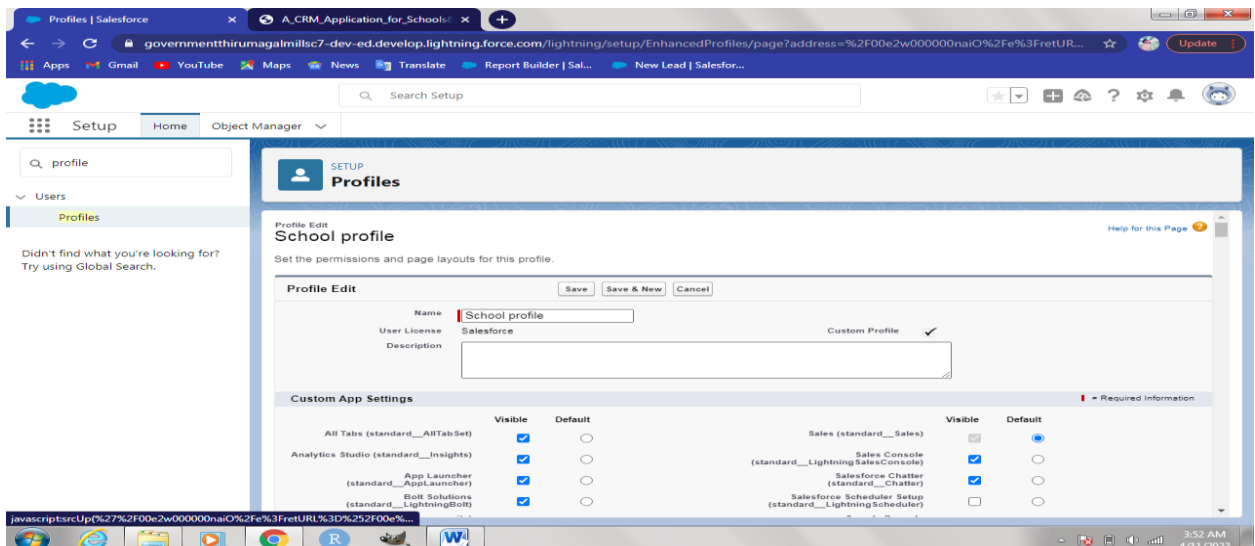


Milestone-4: Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges

Activity:

Creation on profile:

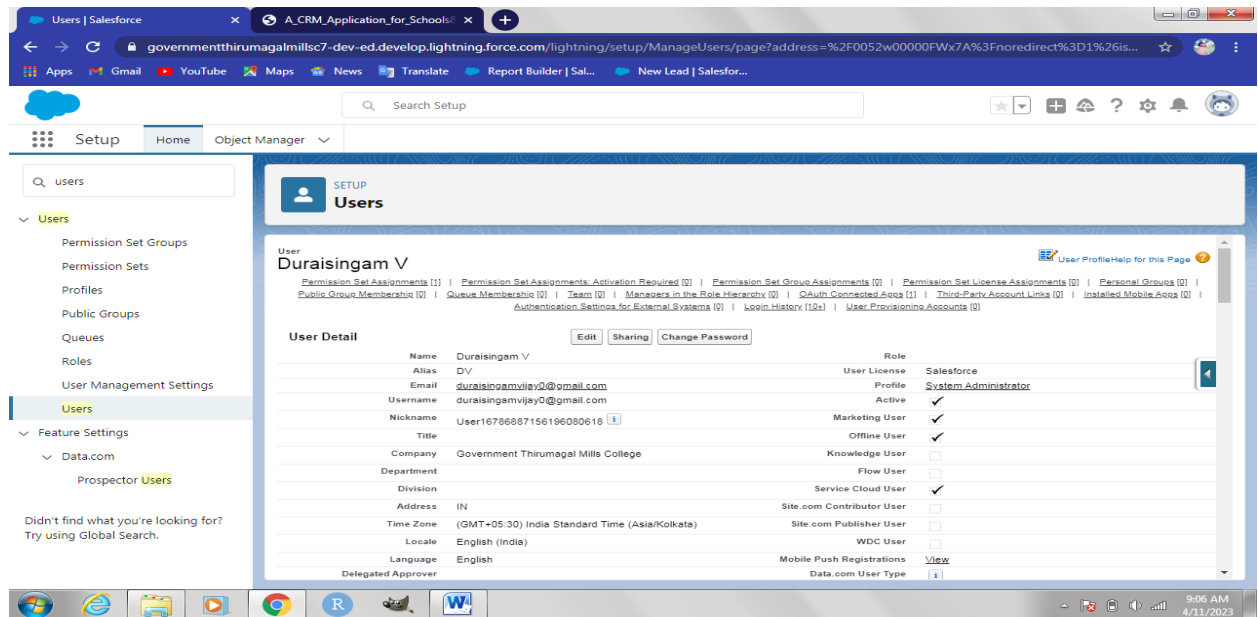


Milestone-5: Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity:

Creating a Users:



Milestone-6:Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Activity-1:

Permission sets 1:

Permission Sets | Salesforce x A_CRM_Application_for_Schools: x

governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp...

Click to go back, hold to see history Maps News Translate Report Builder | Sal... New Lead | Salesfor...

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Permission Sets

Clone: teacher permission

Enter a new label and description for the cloned permission set.

Save Cancel

Enter permission set information

Label teacher permission

API Name teacher_permission

Description

Session Activation Required ☐

License

Save Cancel

9:15 AM 4/11/2023

Permission Sets | Salesforce x A_CRM_Application_for_Schools: x

governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000008gfA4

Apps Gmail YouTube Maps News Translate Report Builder | Sal... New Lead | Salesfor...

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Permission Sets

teacher permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	License	API Name	teacher_permission
Session Activation Required	<input type="checkbox"/>	Namespace Prefix	
Last Modified By	Duraisingam V. 16/03/2023, 9:09 am	Created By	Duraisingam V. 16/03/2023, 9:09 am

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

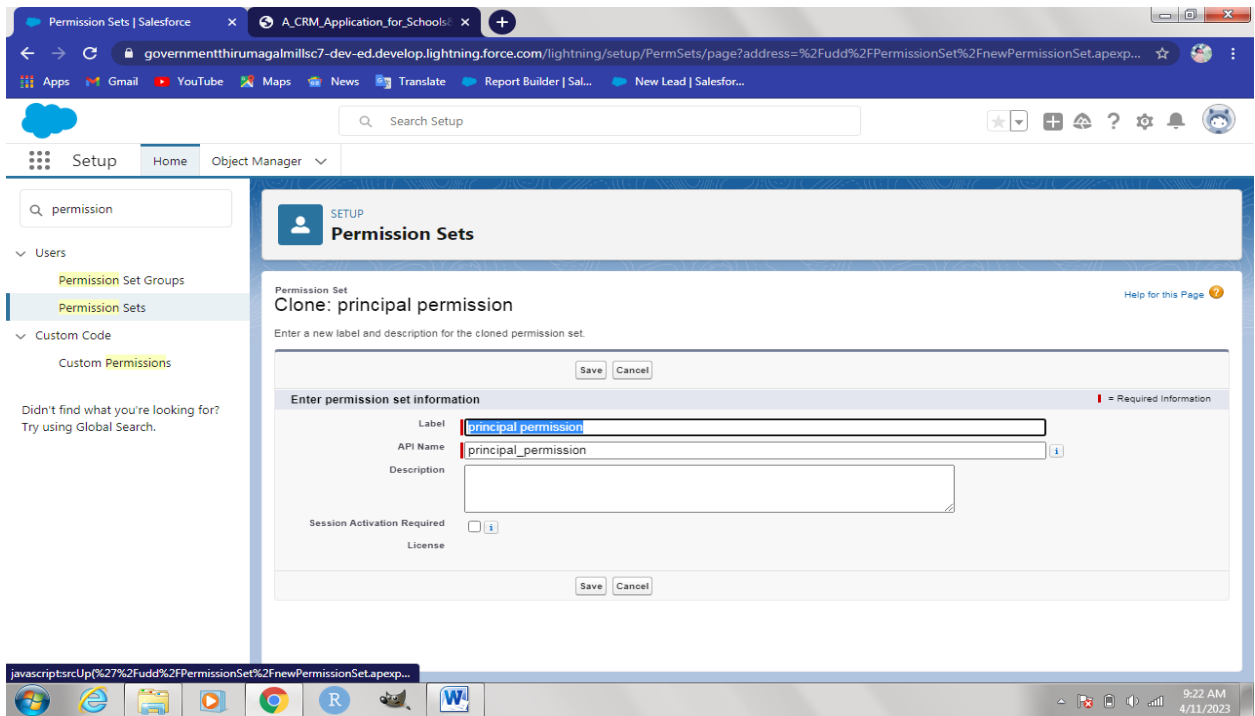
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

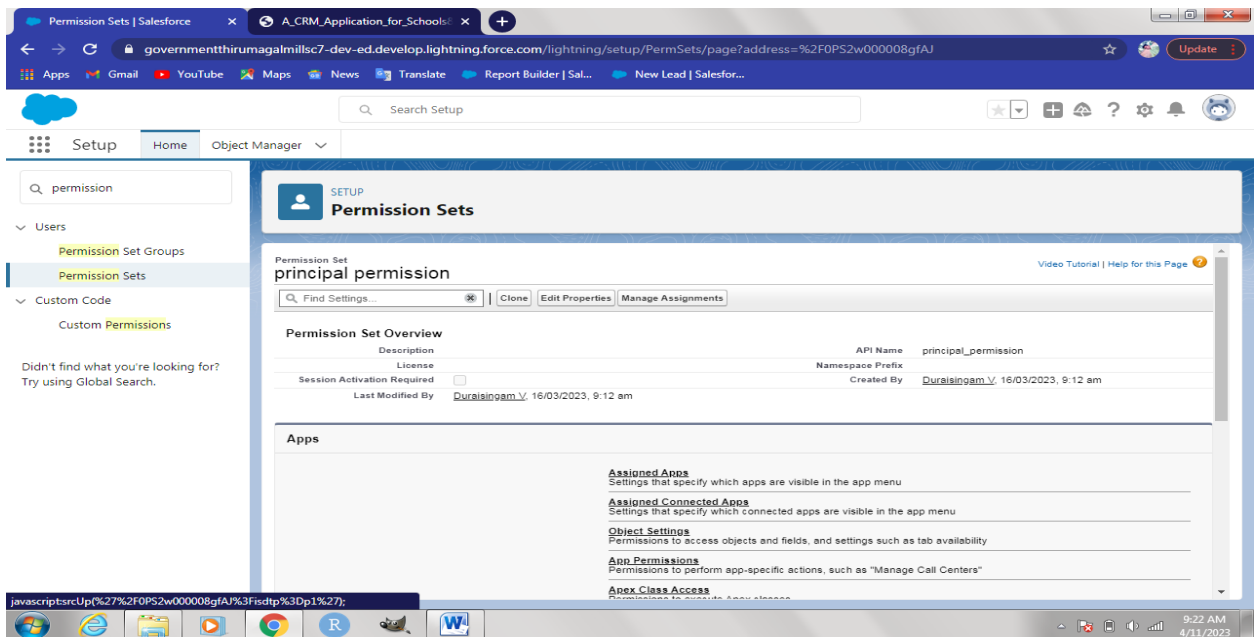
9:16 AM 4/11/2023

Activity-2:

Permission sets 2:



This screenshot shows the Salesforce Setup interface for cloning a permission set. The left sidebar contains a search bar with "permission" and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled "Clone: principal permission" and includes a "Help for this Page" link. Below the title, there is a prompt to "Enter a new label and description for the cloned permission set." and a "Save" button. The "Enter permission set information" section contains fields for Label (principal_permission), API Name (principal_permission), and Description. There are also checkboxes for "Session Activation Required" and "License".



This screenshot shows the Salesforce Setup interface for the "principal permission" permission set. The left sidebar is the same as the previous screenshot. The main content area is titled "principal permission" and includes a "Video Tutorial" link and a "Help for this Page" link. Below the title, there is a "Find Settings..." search bar and buttons for "Clone", "Edit Properties", and "Manage Assignments". The "Permission Set Overview" section displays a table with the following information:

Field	Value
Description	
License	
API Name	principal_permission
Namespace Prefix	
Session Activation Required	<input type="checkbox"/>
Created By	Duraiasingam V.
Created Date	16/03/2023, 9:12 am
Last Modified By	Duraiasingam V.
Last Modified Date	16/03/2023, 9:12 am

The "Apps" section is expanded, showing a list of settings:

- 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.

Milestone-7:Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

Reports :

REPORT ▾
New Accounts Report Accounts

Previewing a limited number of records. Run the report to see everything.

	Last Activity ▾	Account Owner ▾	Account Name ▾	Billing State/Province ▾	Type ▾	Rating ▾	Last Modified Date ▾
1	-	Duraisingam V	GenePoint	CA	Customer - Channel	Cold	13/03/2023
2	-	Duraisingam V	United Oil & Gas, UK	UK	Customer - Direct	-	13/03/2023
3	-	Duraisingam V	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	13/03/2023
4	-	Duraisingam V	Edge Communications	TX	Customer - Direct	Hot	13/03/2023
5	-	Duraisingam V	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	13/03/2023
6	-	Duraisingam V	Pyramid Construction Inc.	-	Customer - Channel	-	13/03/2023
7	-	Duraisingam V	Dickenson plc	KS	Customer - Channel	-	13/03/2023
8	-	Duraisingam V	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	13/03/2023
9	-	Duraisingam V	Express Logistics and Transport	OR	Customer - Channel	Cold	13/03/2023
10	-	Duraisingam V	University of Arizona	AZ	Customer - Direct	Warm	13/03/2023
11	-	Duraisingam V	United Oil & Gas Corp.	NY	Customer - Direct	Hot	13/03/2023
12	-	Duraisingam V	sforce	CA	-	-	13/03/2023

4 Trailhead profile public URL

Team Lead - <https://trailblazer.me/id/strailhead>

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

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

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

5 ADVANTAGES & DISADVANTAGES

Advantages:

- **Better Knowledge of Customers:** Customer Relationship Management is a customer-centric technique. The main focus of CRM technique is on the customers of Business. It helps businesses to acquire all required information of customers. This information is then stored and used for understanding customer behavior.
- **Retain More Customers:** It not only focuses on understanding and serving the existing customers of businesses. CRM aims at acquiring more and more customers for businesses. It targets to increase the customer base & retain them for the long term. Through CRM, a communication channel is developed between customers and business which acquires all information regarding customers.

Disadvantage:

- **Costly:** Implementation of CRM system requires huge cost to be spent by the business. CRM software are too costly as it came with different price packages as per the needs of organizations. It increases the overall expenses of business and may not be suitable for small businesses.
- **Security Issues:** Another major drawback with CRM is the insecurity of data collected and stored. All of the data collected is stored at one centralized location which has a threat of being lost or hacked by someone. Employees may add inaccurate data or manipulate figures leading to wrongful planning.
- **Third Party Access:** CRM data can be obtained and misused by other parties. There have been many cases where web hosting companies take and sells CRM data to the third party. Various sensitive data about customers may get into the wrong hands and cause loss to peoples.

6 APPLICATIONS

Salesforces to the platform developed application to solution applied areas in business logic to travel app using solution or formulas .

7 CONCLUSION

The project over all view to develop in the application on the salesforce in customer success platform and designed. Then use of object and field work on the salesforce developed in application of travel approval build on employee traveling using on dencinetion to other work space moving useful the application.

8 FUTURE SCOPE

The developer salesforce in the travel approval application developing in employee easy to convinced that the future change on advanced future put in application.