

# **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.

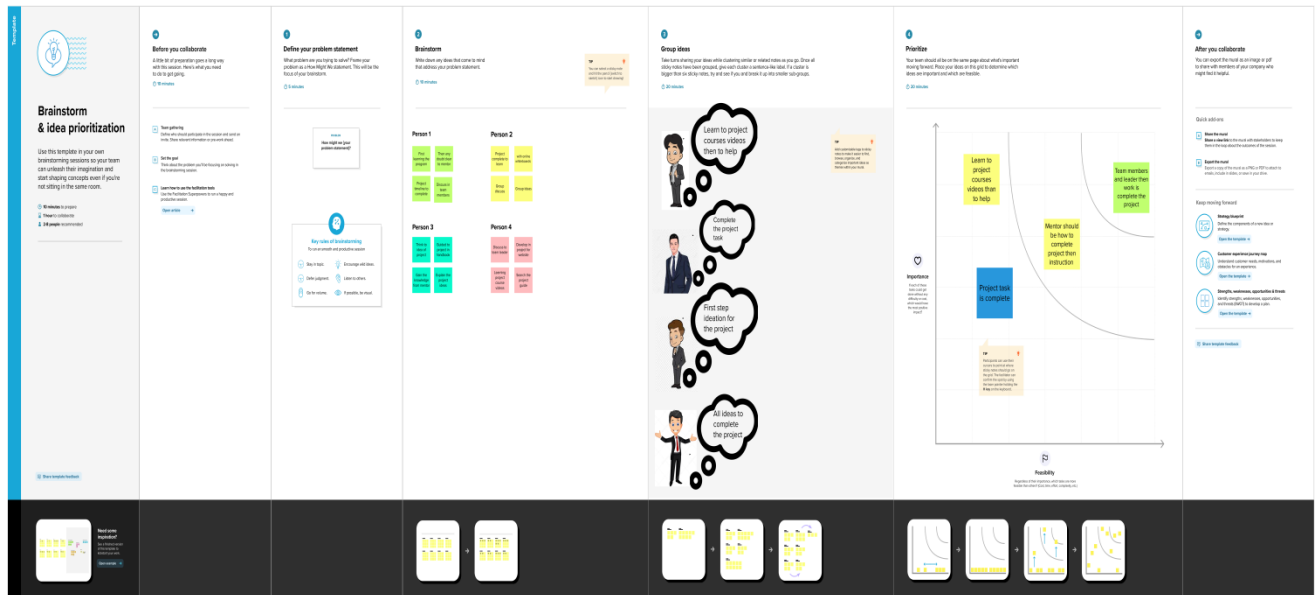
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

## **2 Problem Definition & Design Thinking**

### **2.1 Empathy map**



## 2.2 Ideation & Brainstorming Map



## 3 RESULT

### 3.1 Data Model

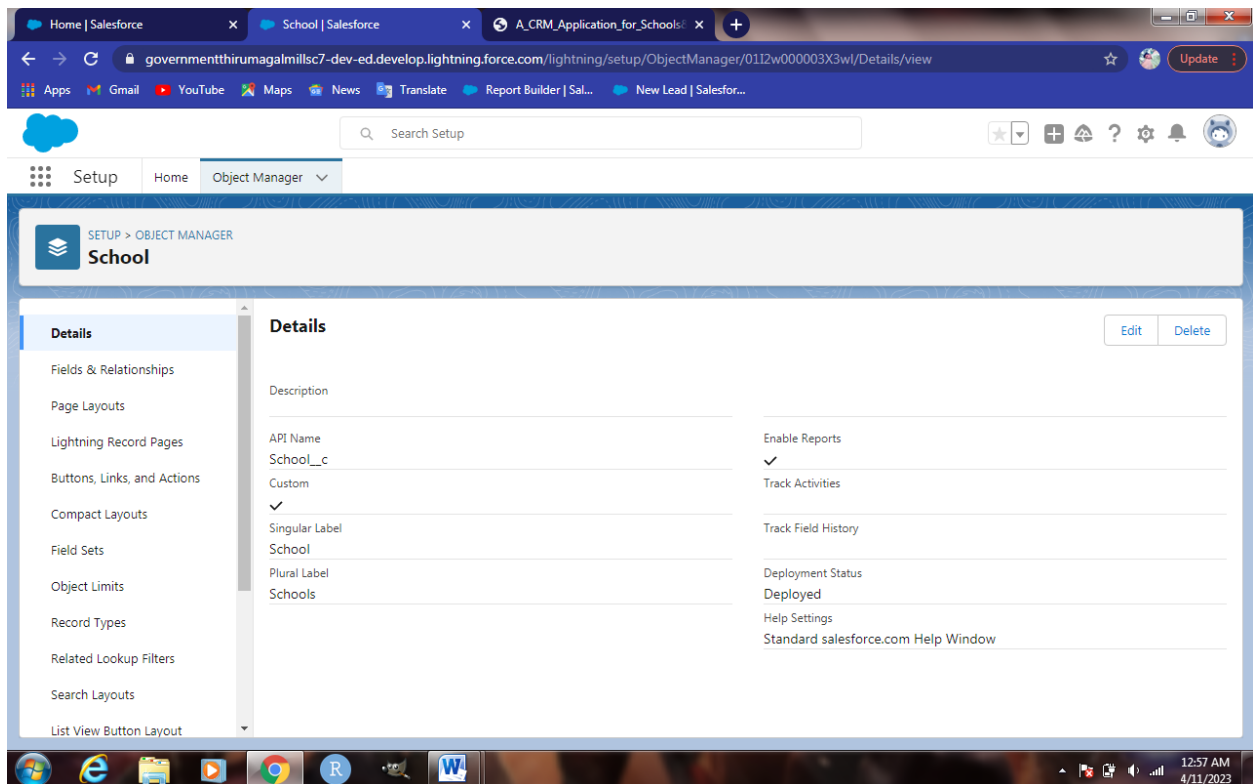
Object name	Field in the Object										
Object 1  School	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Address</td><td>Text Area</td></tr> <tr> <td>Phone Number</td><td>Phone</td></tr> <tr> <td>Number of students</td><td>Roll-up-summary</td></tr> <tr> <td>Highest mark</td><td>Roll-up-summary</td></tr> </table>	Field label	Data type	Address	Text Area	Phone Number	Phone	Number of students	Roll-up-summary	Highest mark	Roll-up-summary
Field label	Data type										
Address	Text Area										
Phone Number	Phone										
Number of students	Roll-up-summary										
Highest mark	Roll-up-summary										
Object 2  Student	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Phone Number</td><td>Phone</td></tr> <tr> <td>School</td><td>Master-Details Relationship</td></tr> <tr> <td>Result</td><td>Picklist</td></tr> <tr> <td>Class</td><td>Number</td></tr> </table>	Field label	Data type	Phone Number	Phone	School	Master-Details Relationship	Result	Picklist	Class	Number
Field label	Data type										
Phone Number	Phone										
School	Master-Details Relationship										
Result	Picklist										
Class	Number										

<b>Object 3</b>  <b>Parent</b>	<b>Field label</b>	<b>Data type</b>
	<b>Parent Address</b>	<b>Text Area</b>
	<b>Parent Number</b>	<b>Phone</b>

### 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 browser address bar displays the URL: `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3xo/Details/view`. The left sidebar contains a navigation menu with the following items: Details (selected), 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 bottom status bar shows the time as 12:59 AM on 4/11/2023.

## Activity 3: Create parent object

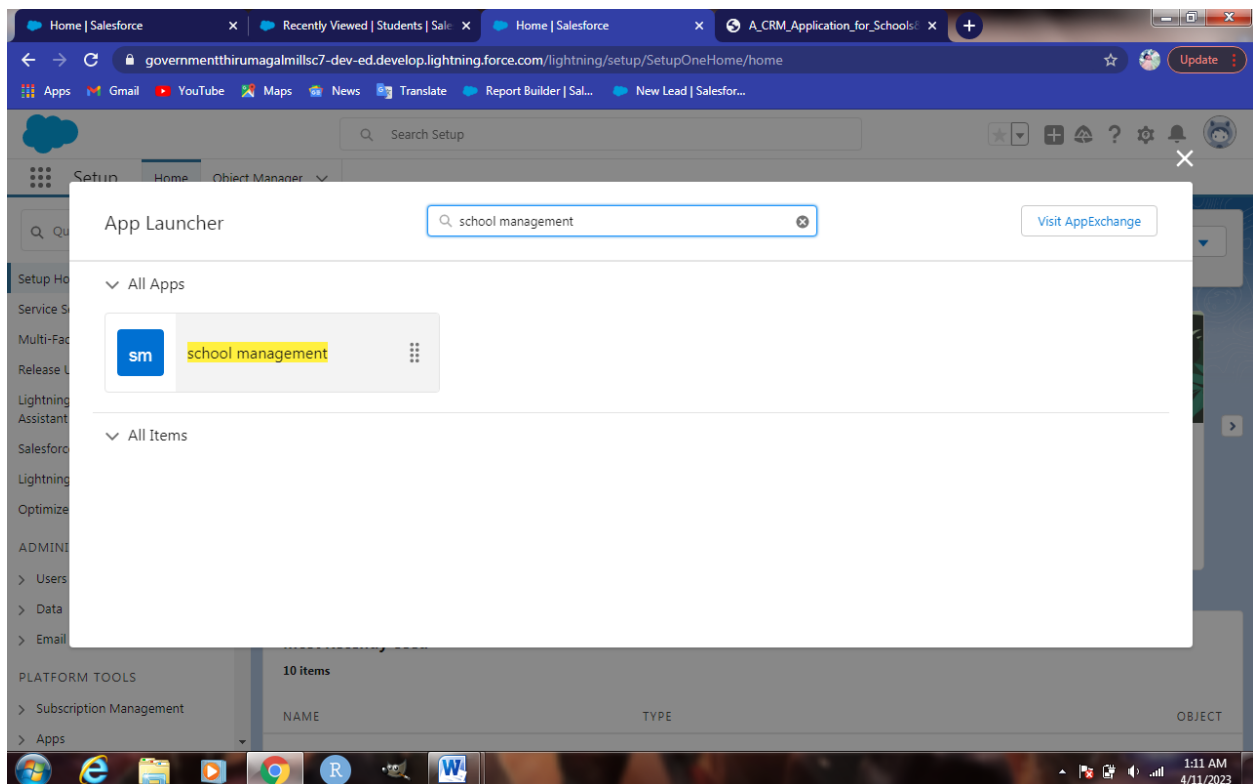
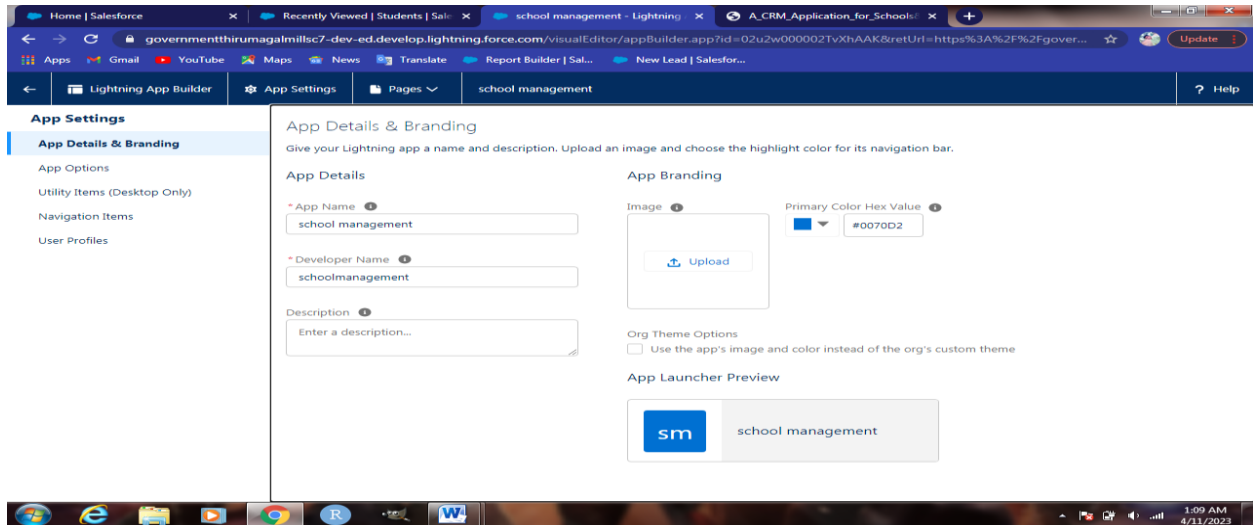
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The browser address bar displays the URL: `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3y3/Details/view`. The left sidebar contains a navigation menu with the following items: 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, 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 bottom status bar shows the time as 1:02 AM on 4/11/2023.

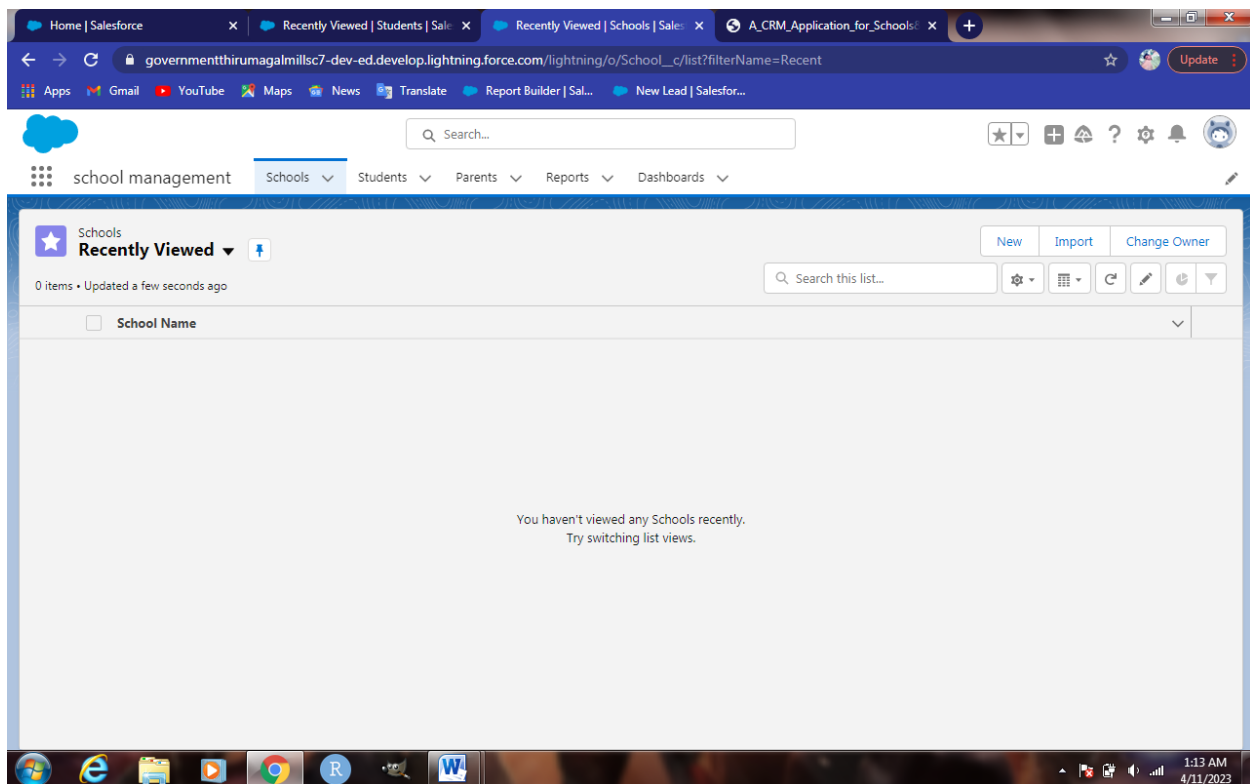
## Milestone-2:Lightning App

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.

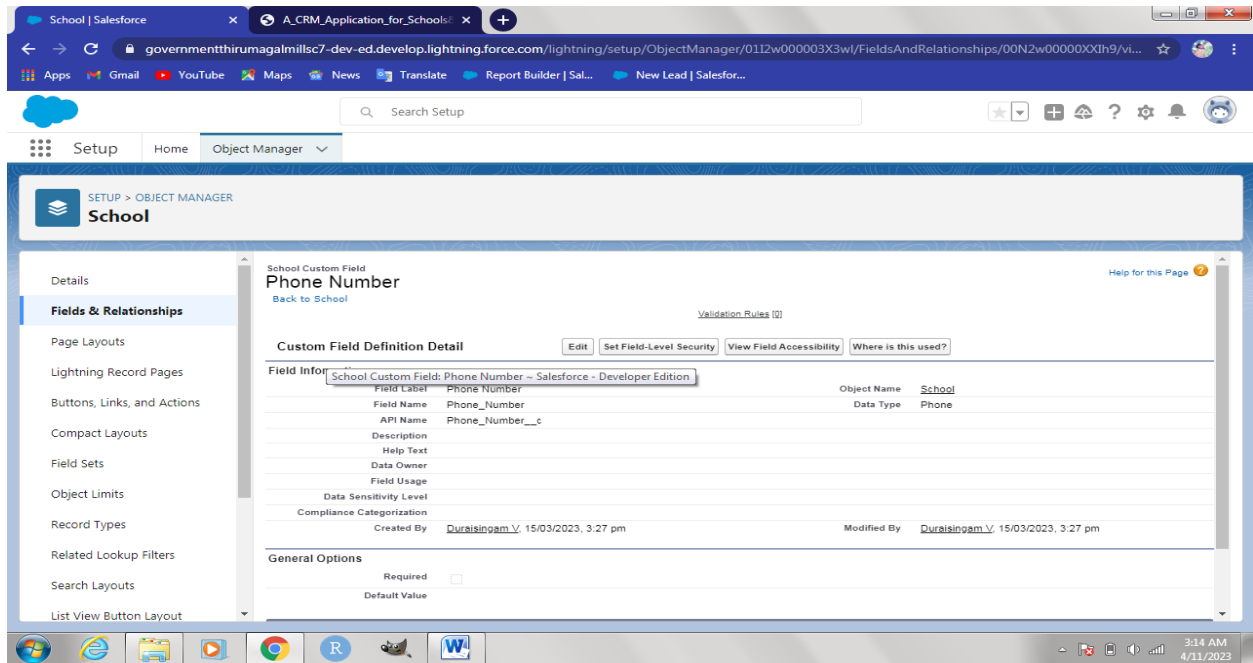
#### **Activity-1:**

**Creation of fields for the School objects:**

**Address:**



## Phone Number

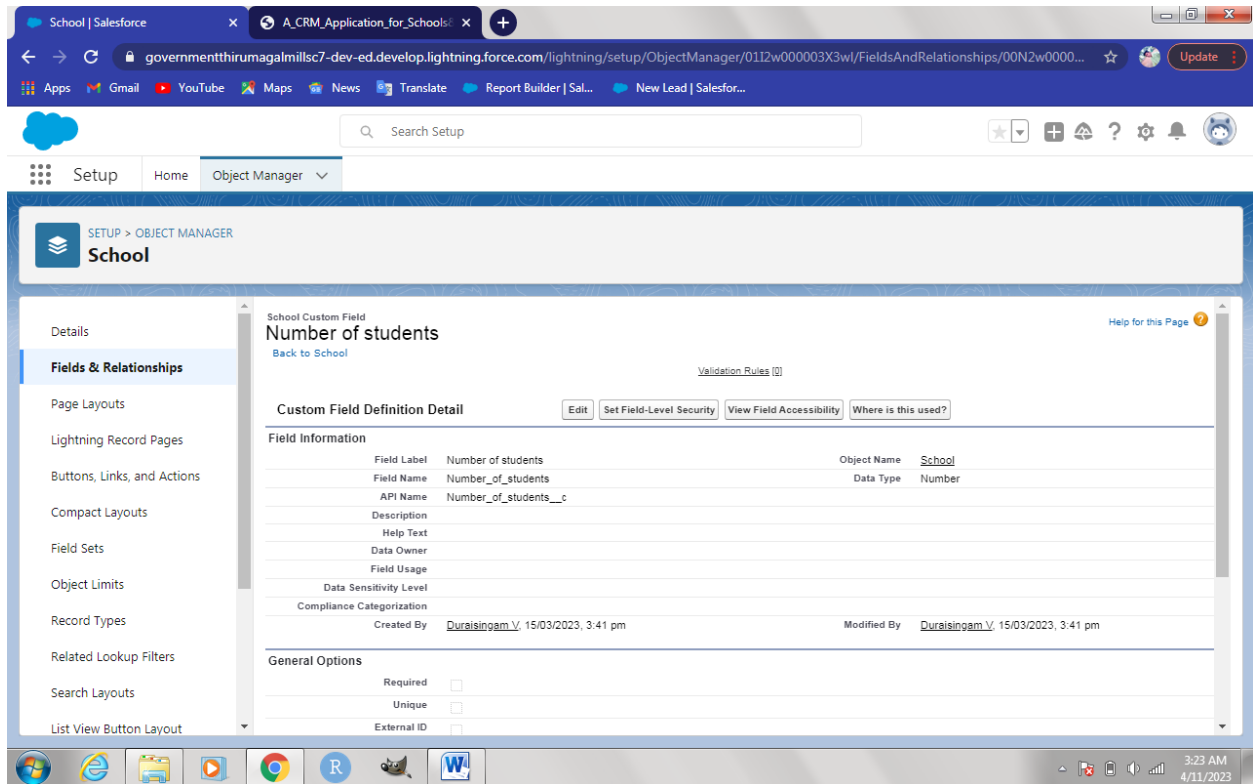


The screenshot shows the Salesforce Setup interface for a custom field named "Phone Number" on the "School" object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the "Custom Field Definition Detail" for the "Phone Number" field. 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

Below the field information, the "General Options" section shows the "Required" checkbox is unchecked, and the "Default Value" field is empty.

## Number of students:



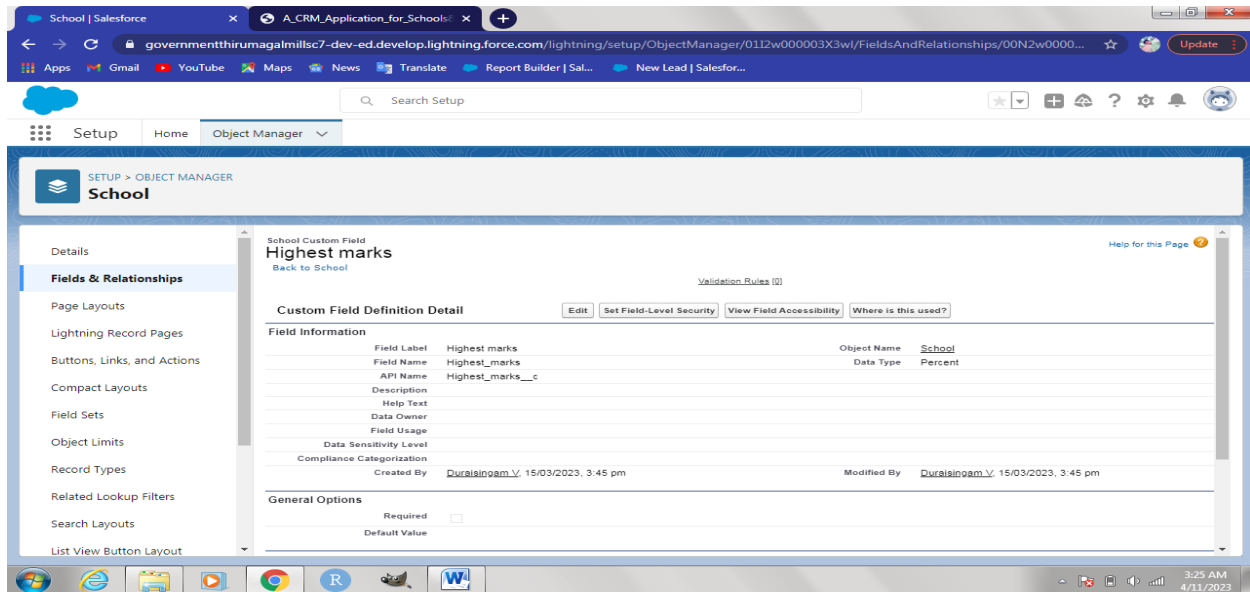
The screenshot shows the Salesforce Setup interface for a custom field named "Number of students" on the "School" object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the "Custom Field Definition Detail" for the "Number of students" field. 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

Below the field information, 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 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 for the 'Highest marks' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, compliance categorization, and creation/modification dates. The 'General Options' section shows the 'Required' checkbox is unchecked and the 'Default Value' is empty.

Field Label	Highest marks	Object Name	School
Field Name	Highest_marks	Data Type	Percent
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

**General Options**

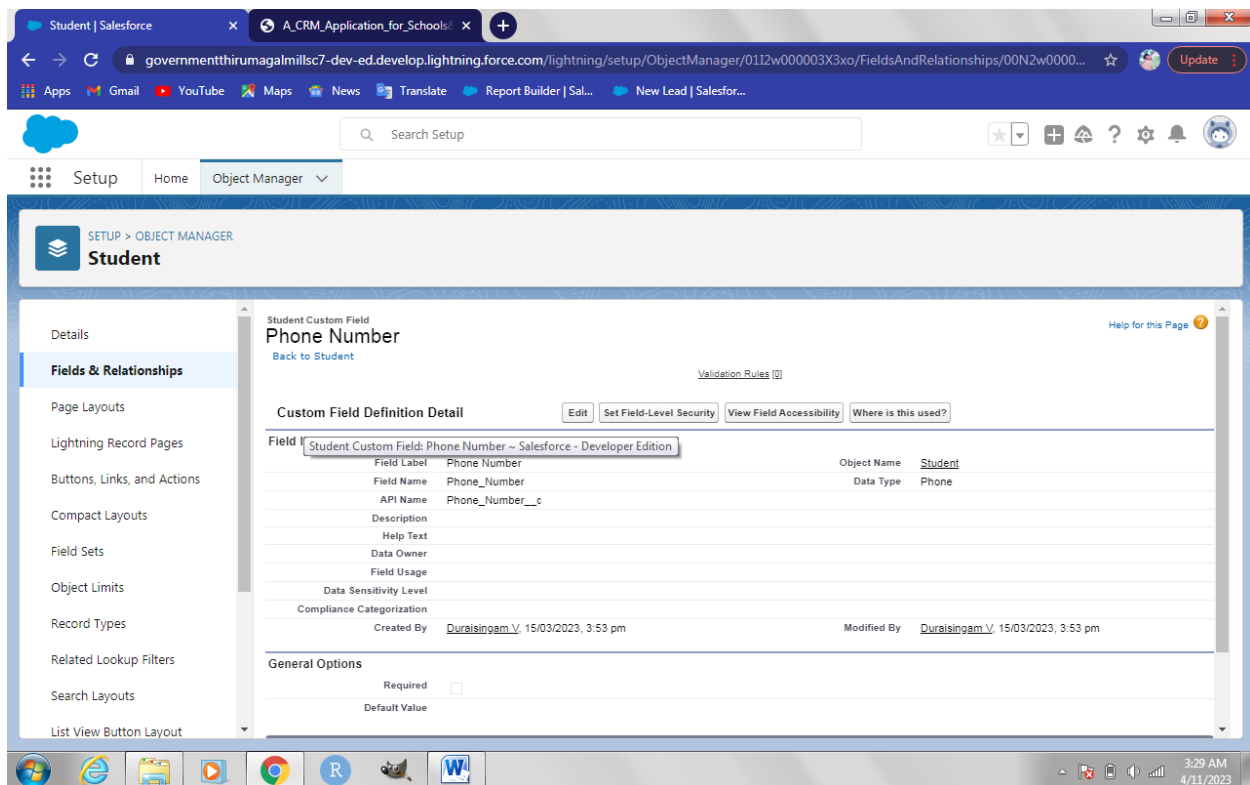
Required ☐

Default Value

## Activity-2:

### Creation of fields for the Student objects:

### Phone number:



The screenshot shows the Salesforce Setup interface for 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 for the 'Phone Number' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, compliance categorization, and creation/modification dates. The 'General Options' section shows the 'Required' checkbox is unchecked and the 'Default Value' is empty.

Field Label	Phone Number	Object Name	Student
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, 3:53 pm	Modified By	Duraisingam V. 15/03/2023, 3:53 pm

**General Options**

Required ☐

Default Value

## School:

The screenshot shows the Salesforce Setup interface for a custom field named 'School'. The browser address bar displays the URL: `governmentthirumagalmisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3xo/FieldsAndRelationships/00N2w0000...`. 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 the title 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:

Field Information	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

Below the table, the 'Master-Detail Options' section shows the 'Related To' field set to 'School' and the 'Child Relationship Name' set to 'Students'. A note indicates: '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 browser address bar displays the URL: `governmentthirumagalmisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3xo/FieldsAndRelationships/00N2w0000...`. The left sidebar is identical to the previous screenshot. The main content area is titled 'Student Custom Field Results' and includes a 'Back to Student' link. Below the title 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:

Field Information	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

Below the table, the 'General Options' section shows the 'Required' checkbox is unchecked and the 'Default Value' is set to '1'.

Class:

The screenshot shows the Salesforce Setup interface for 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, and Search Layouts. The main content area is titled 'Student Custom Field Class' and includes a 'Back to Student' link. Below this, there are tabs for 'Validation Rules (0)', '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 has columns for 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 for 'Class' is as follows:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
Class	Class	Class__c							Duraisingam V. 15/03/2023, 3:59 pm	Duraisingam V. 15/03/2023, 3:59 pm

Below the table, there are 'General Options' with checkboxes for 'Required' and 'Unique'.

Activity-3:

Creation of fields for the Parent objects:

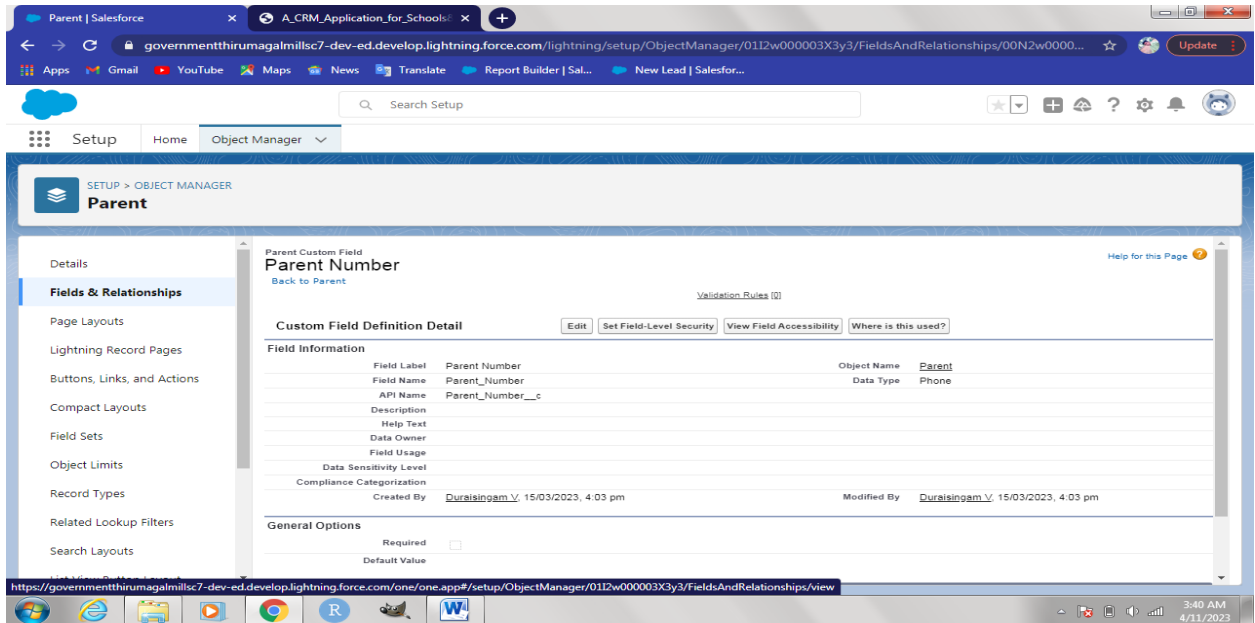
Parent Address:

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar 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 'Parent Custom Field Parent address' and includes a 'Back to Parent' link. Below this, there are tabs for 'Validation Rules (0)', '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 has columns for 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 for 'Parent address' is as follows:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
Parent address	Parent address	Parent_address__c							Duraisingam V. 15/03/2023, 4:02 pm	Duraisingam V. 15/03/2023, 4:02 pm

Below the table, there are 'General Options' with checkboxes for 'Required' and 'Default Value'.

## Parent Number:

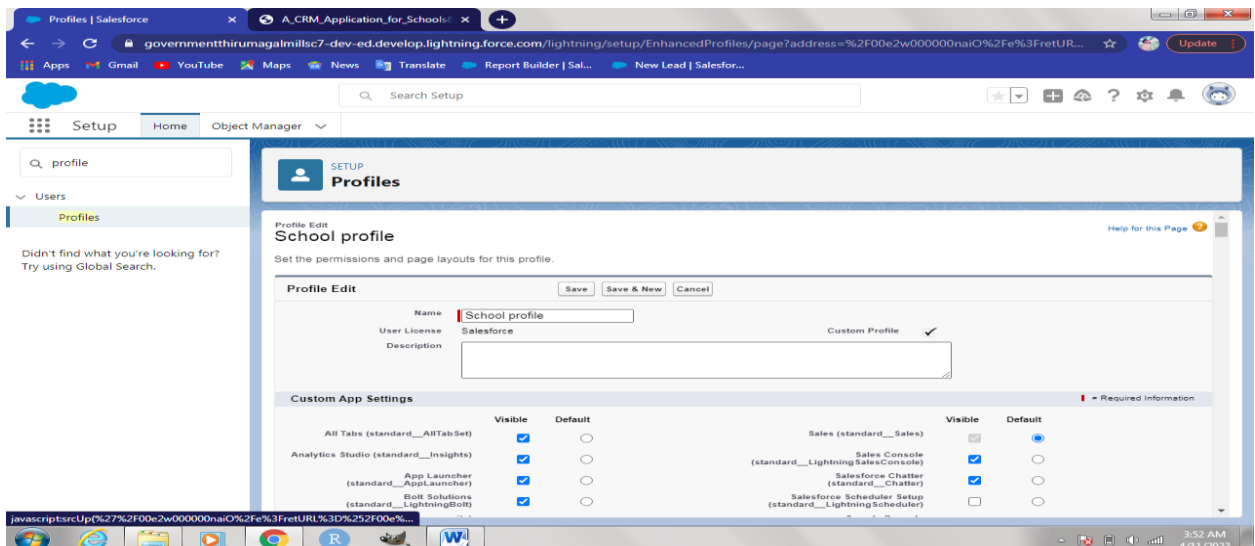


## Milestone-4: Profile

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:

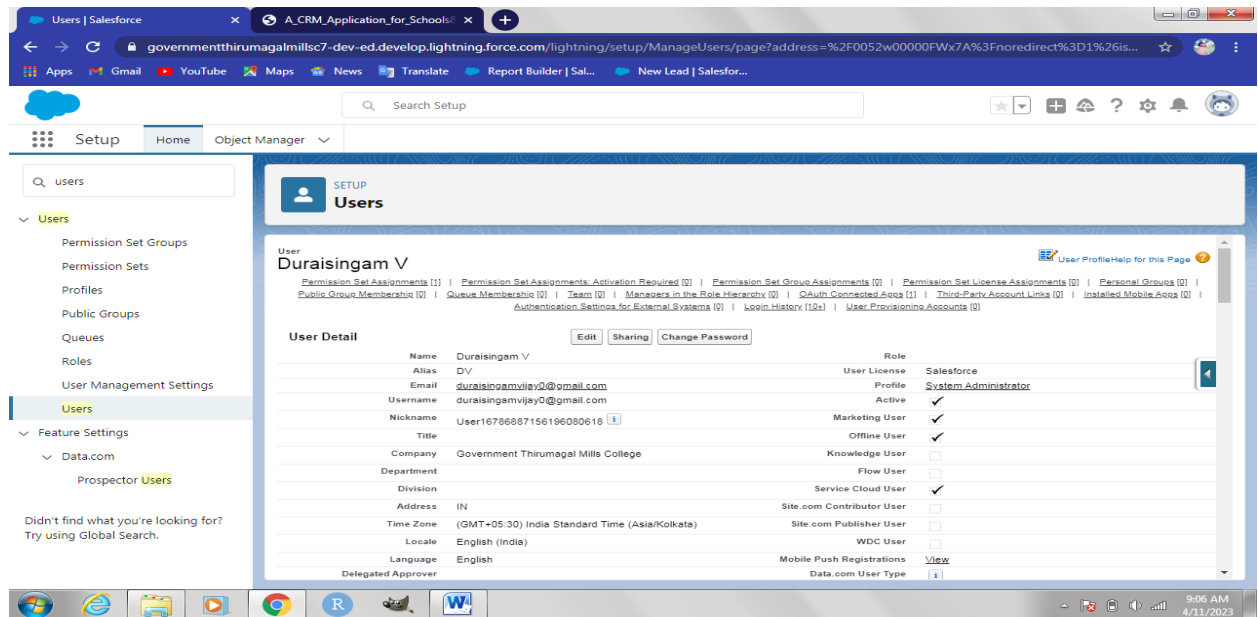


## Milestone-5: Users

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

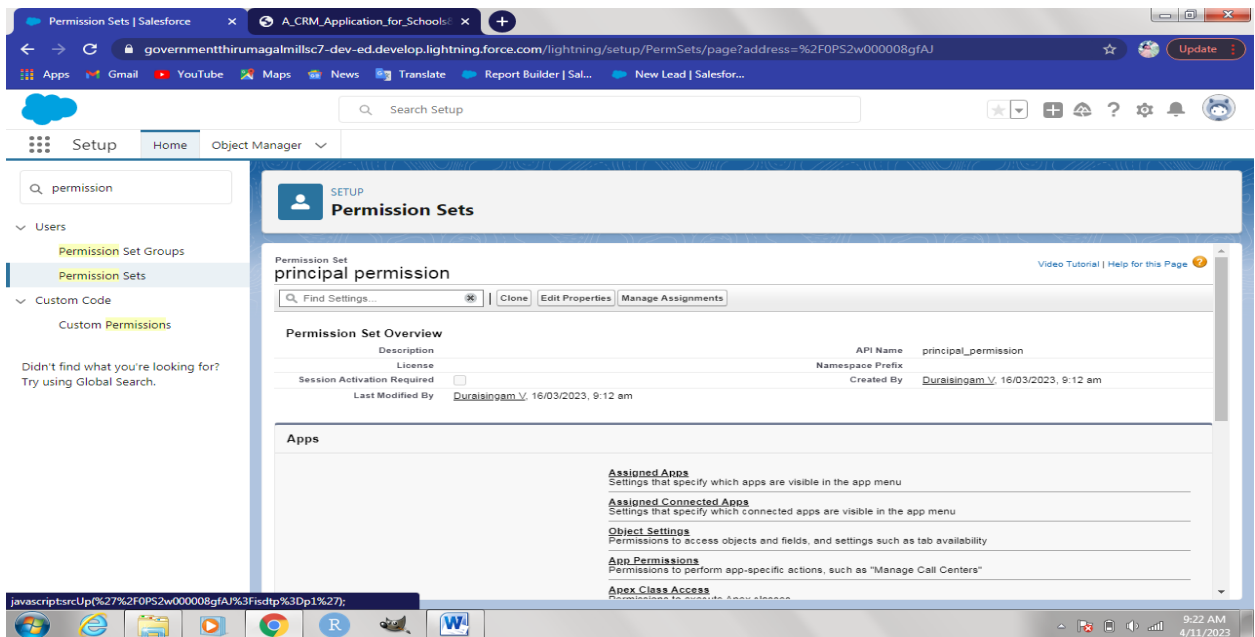
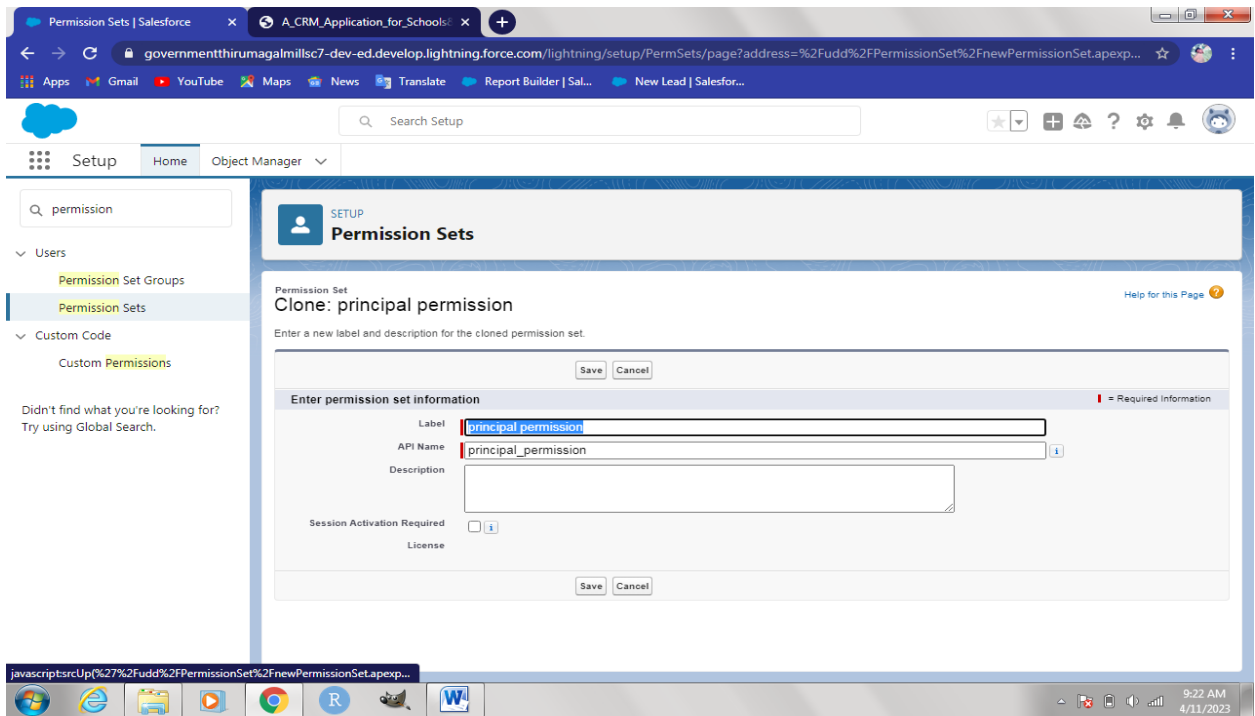
**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

9:16 AM 4/11/2023

## Activity-2:

### Permission sets 2:



## 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.