Project Report

Project Title: A CRM APPLICATION FOR SCHOOL/COLLEGE

1. Introduction:

1.1 Overview

It's Provide Real-time Knowledge for the entire Student.

1. Real time sales force project
2. Object & Relationship in sales force
3. Profile
4. Users
5. Lightning App
6. Permission sets
7. Reports

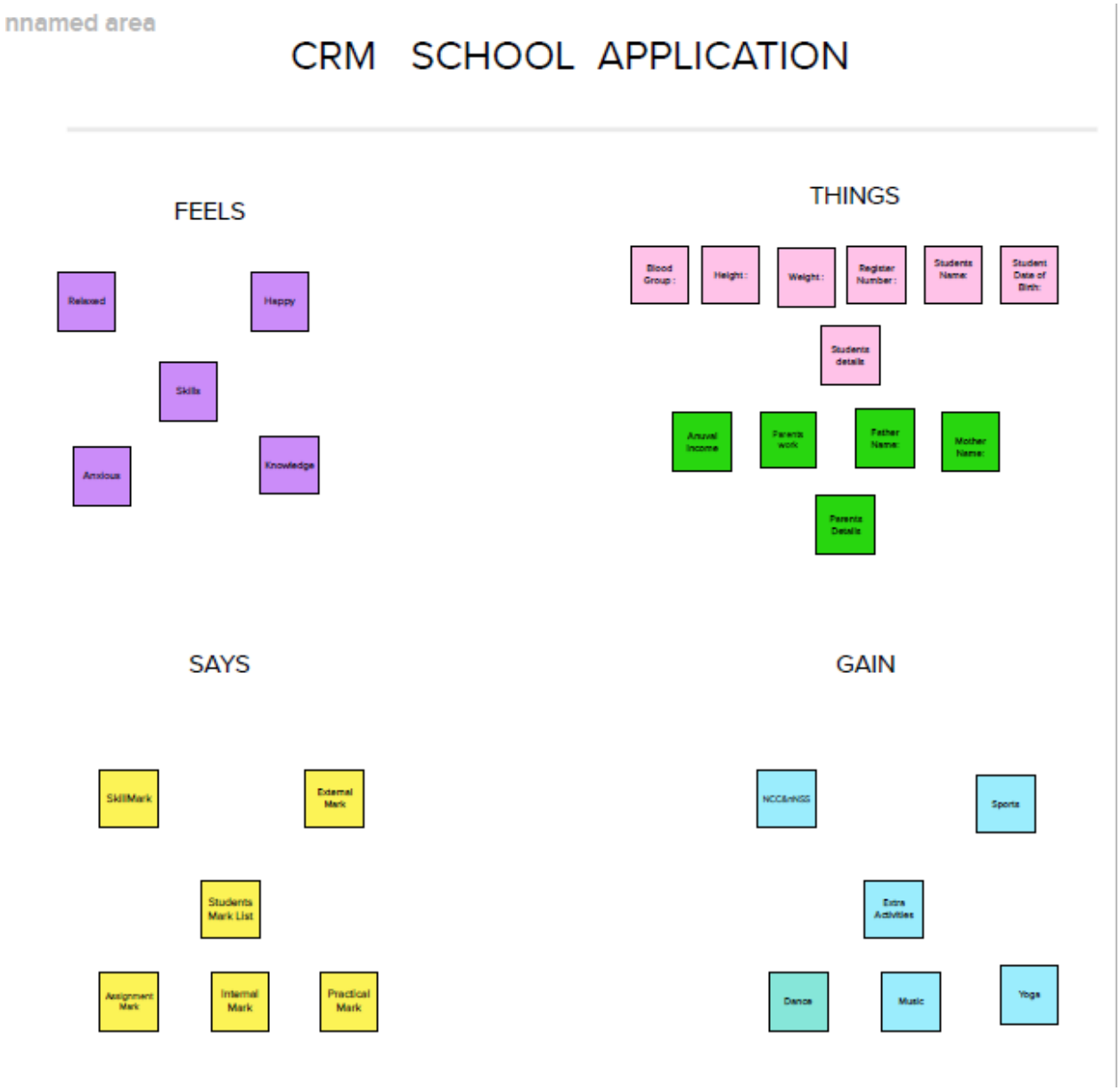
1.2 Purpose

1 .This Project used to educational system.

2. I achieved of every object details like school, parent & student.

2. Problem Definition & Design Thinking:

2.1 Empathy map



2.2 Ideation & Brainstorming map

3. Result

3.1 Data Model:

Object name: Obj1

Fields in the object: Field label-School

Data type- Text

Object name: Obj2

Fields in the object: Field label- Student

Data type- Text

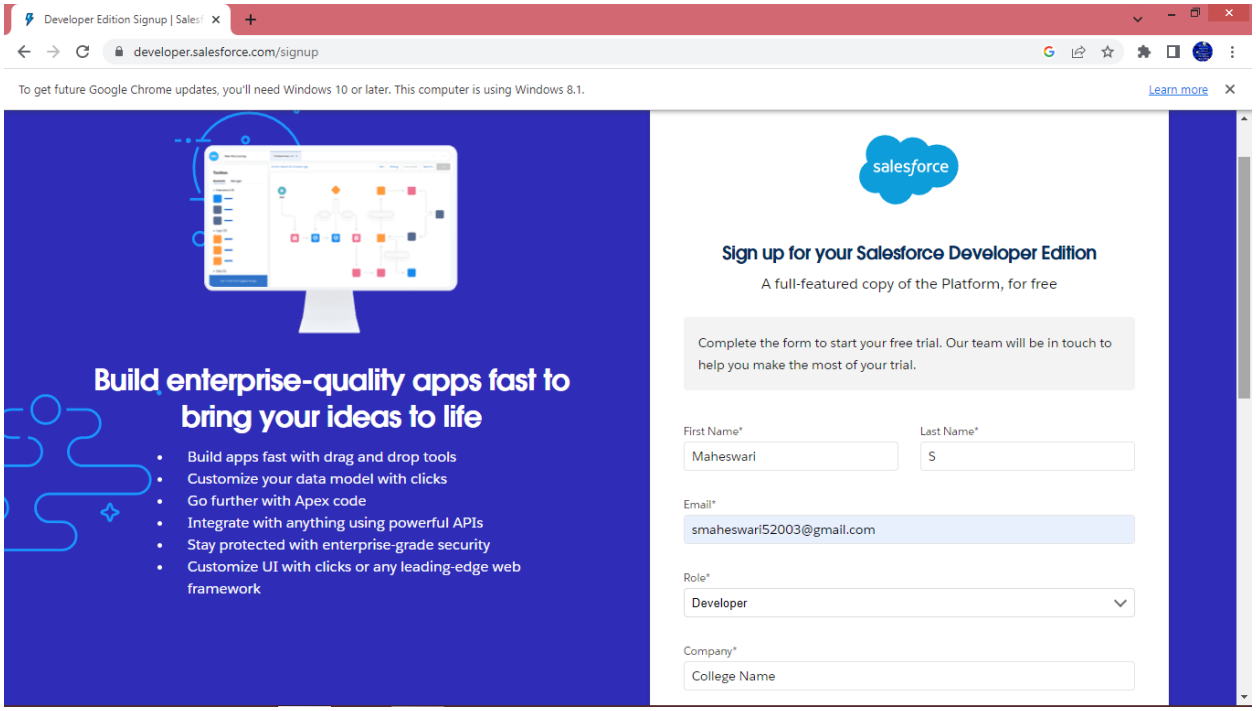
Object name: Obj3

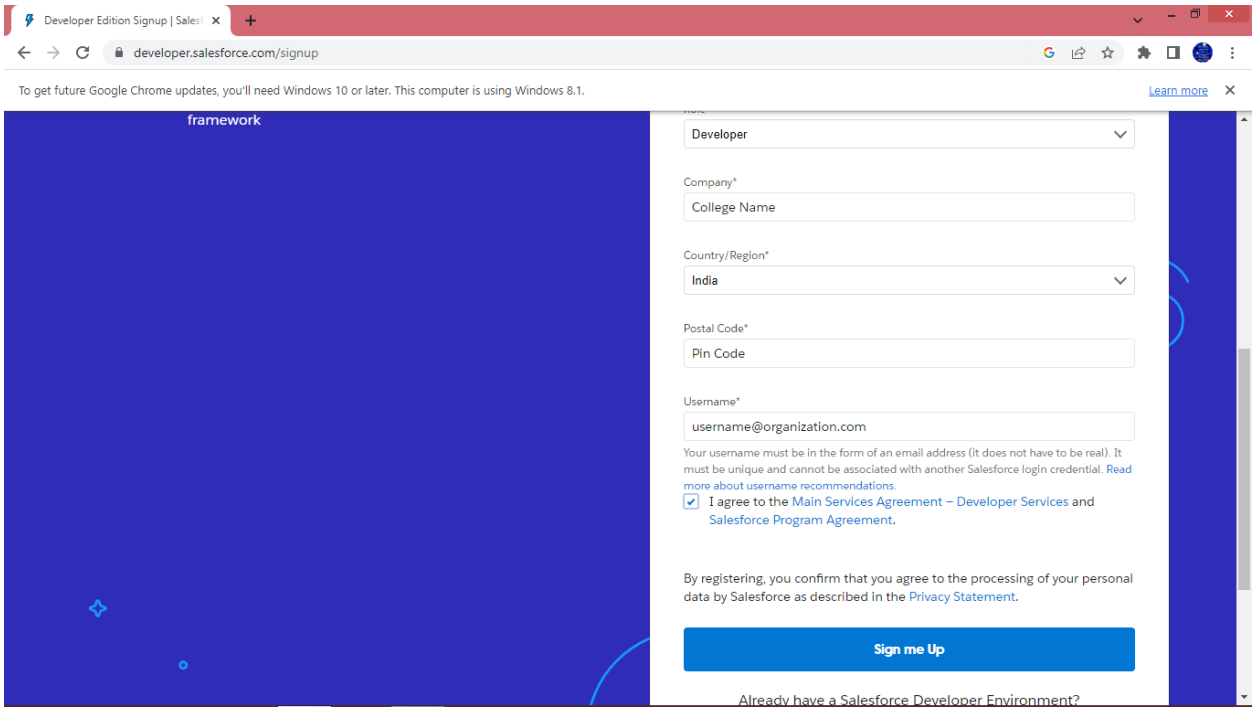
Fields in the object: Field label-Parent

Data type-Text

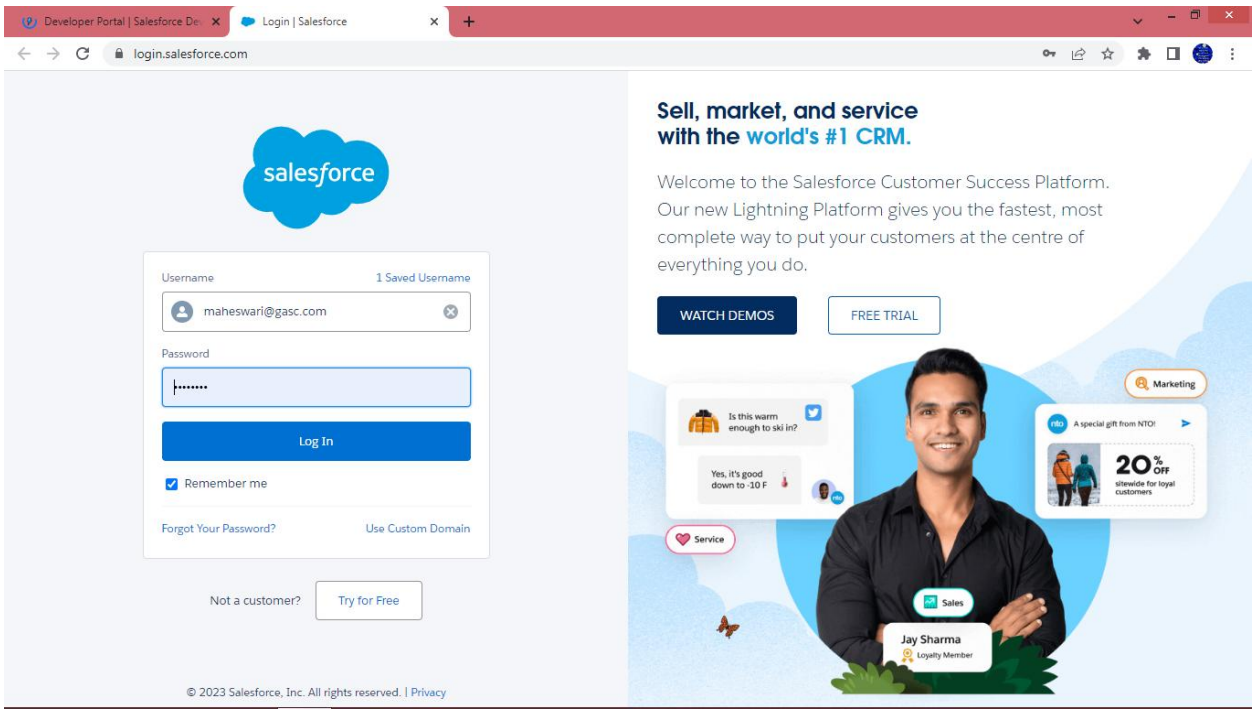
3.2Activity& Screenshots

Activity: Creating Developer Account

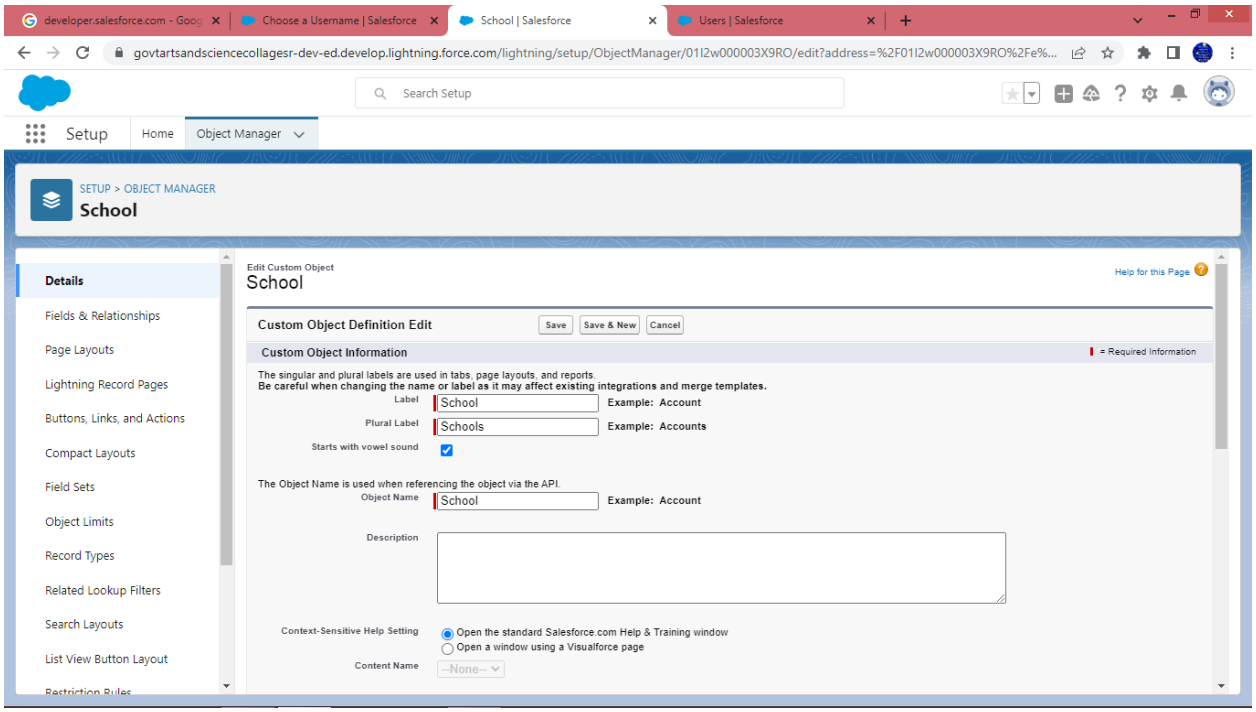


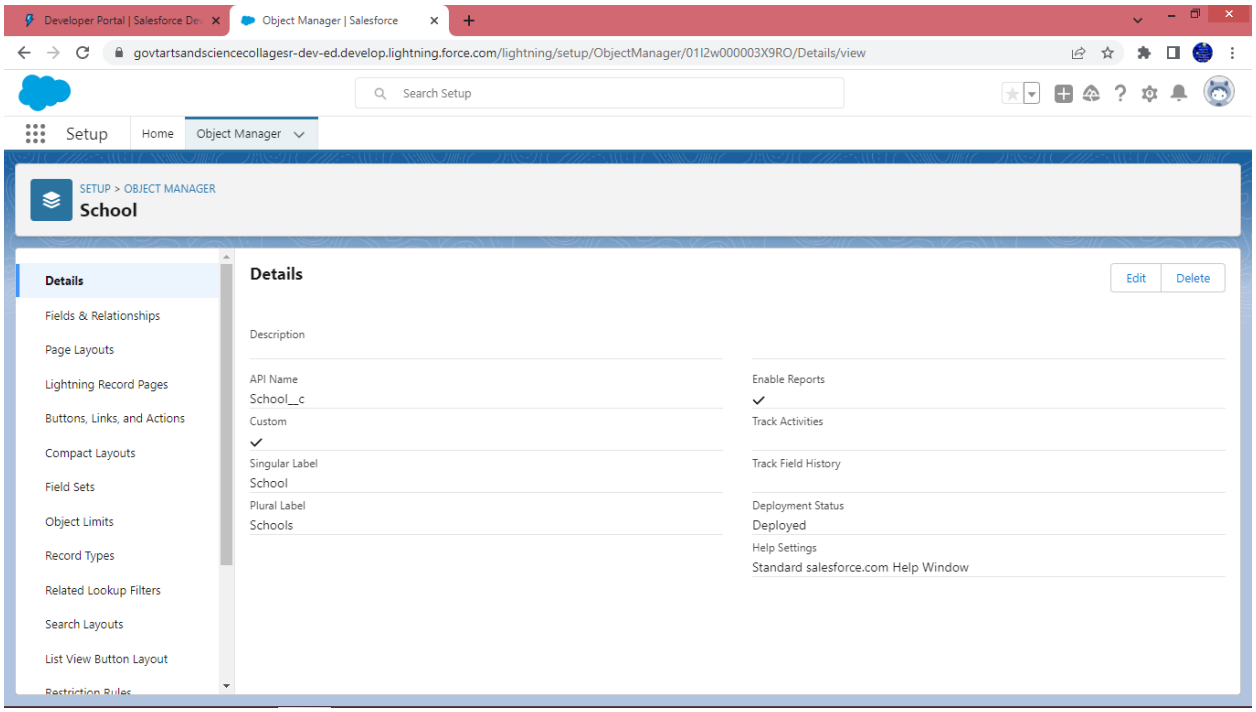


Login to sales force Account

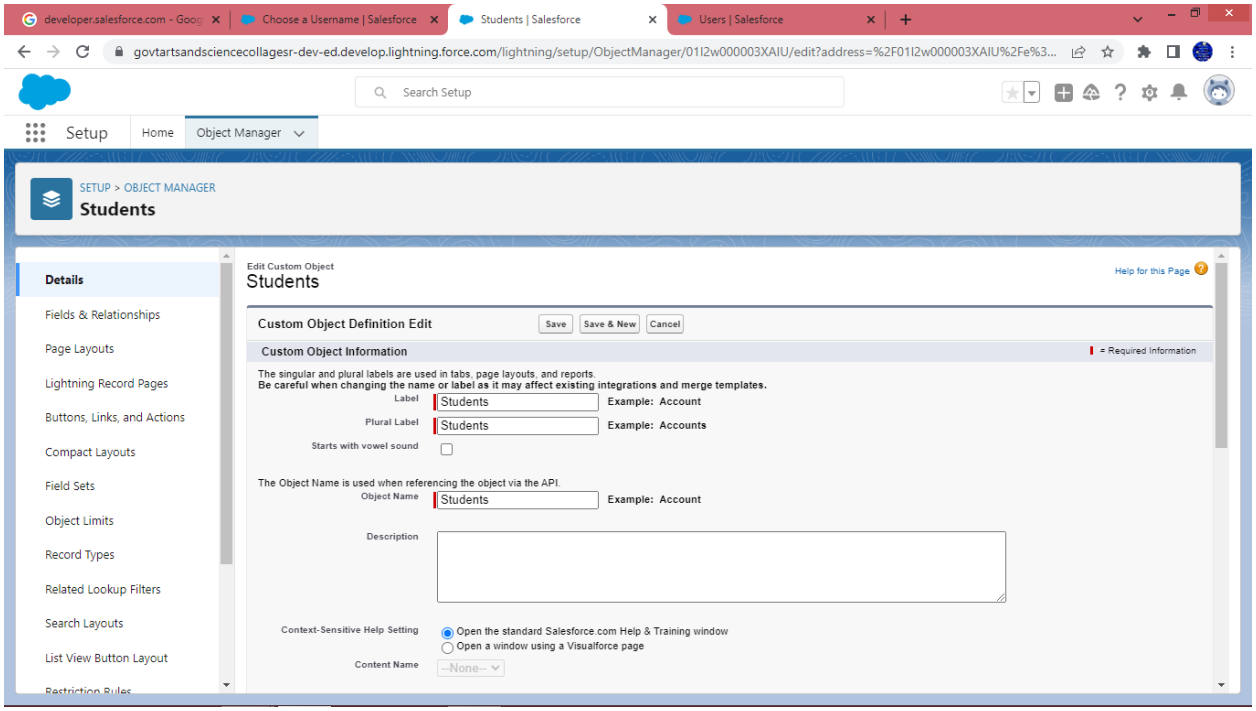


Activity-1: Creation of School Object





Activity 2: Create Student Object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Search Setup
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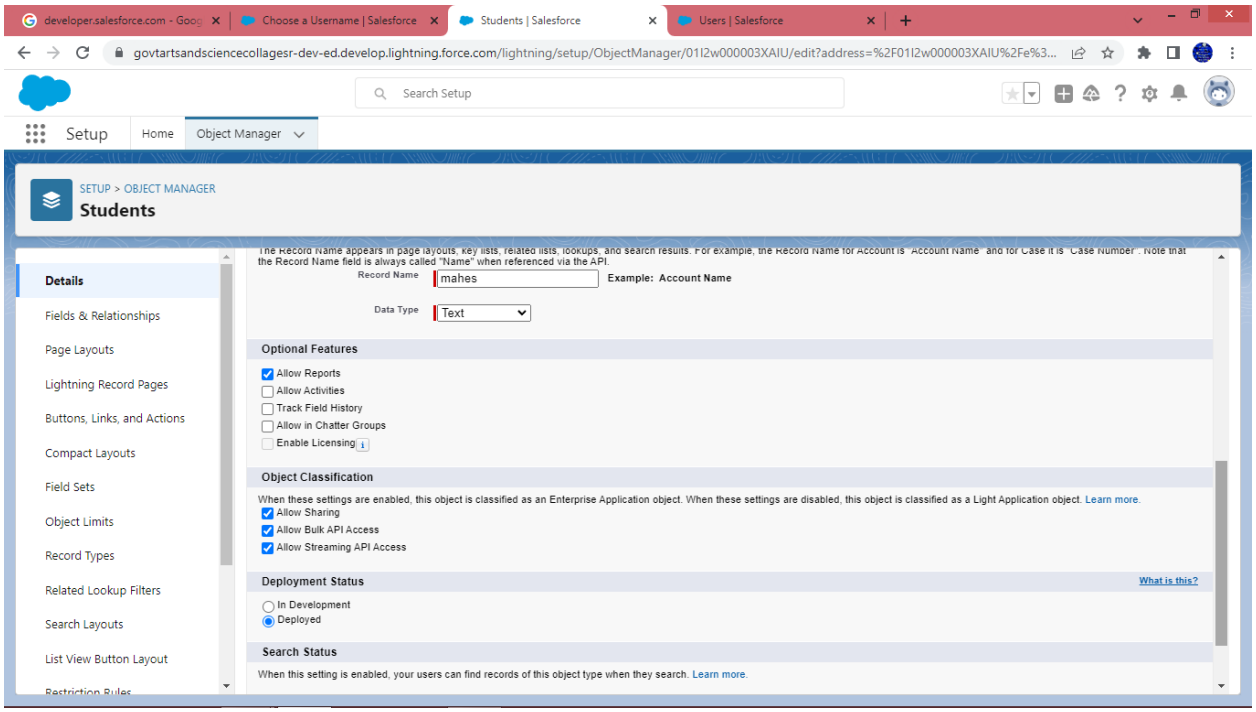
Home
Object Manager
SETUP > OBJECT MANAGER
Students
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Edit Custom Object
Students
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Students
Example: Account
Plural Label
Students
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Students
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--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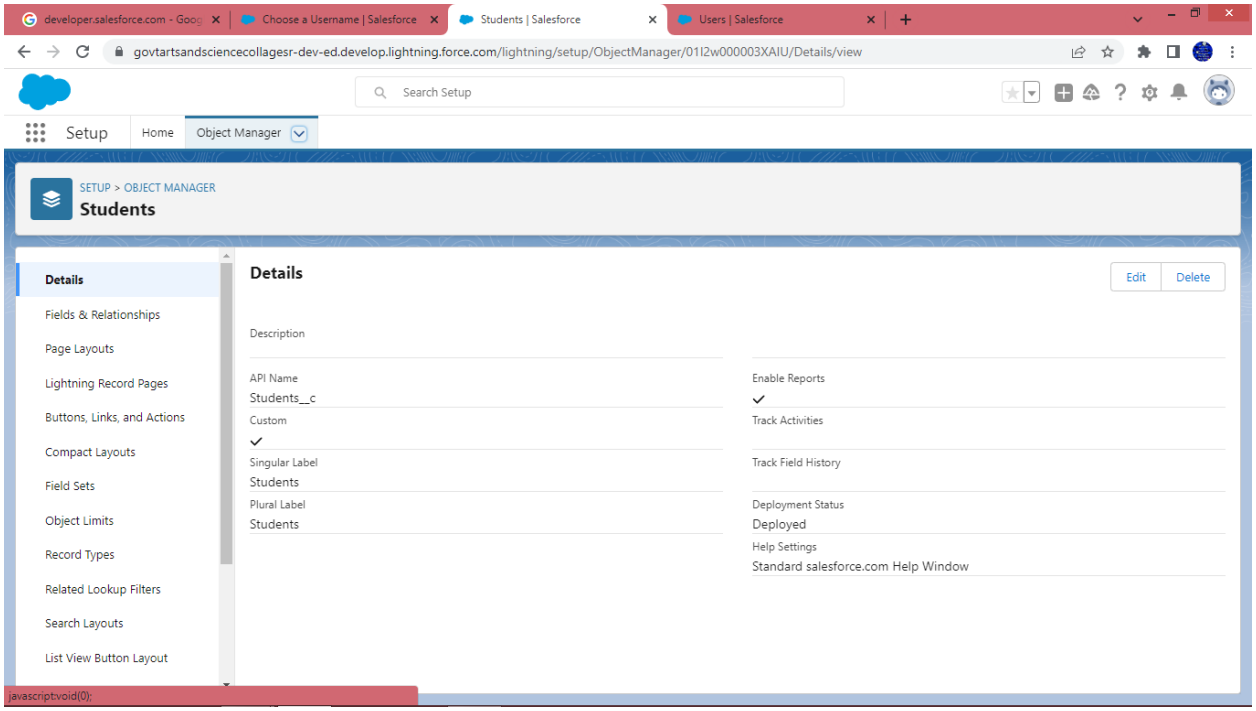
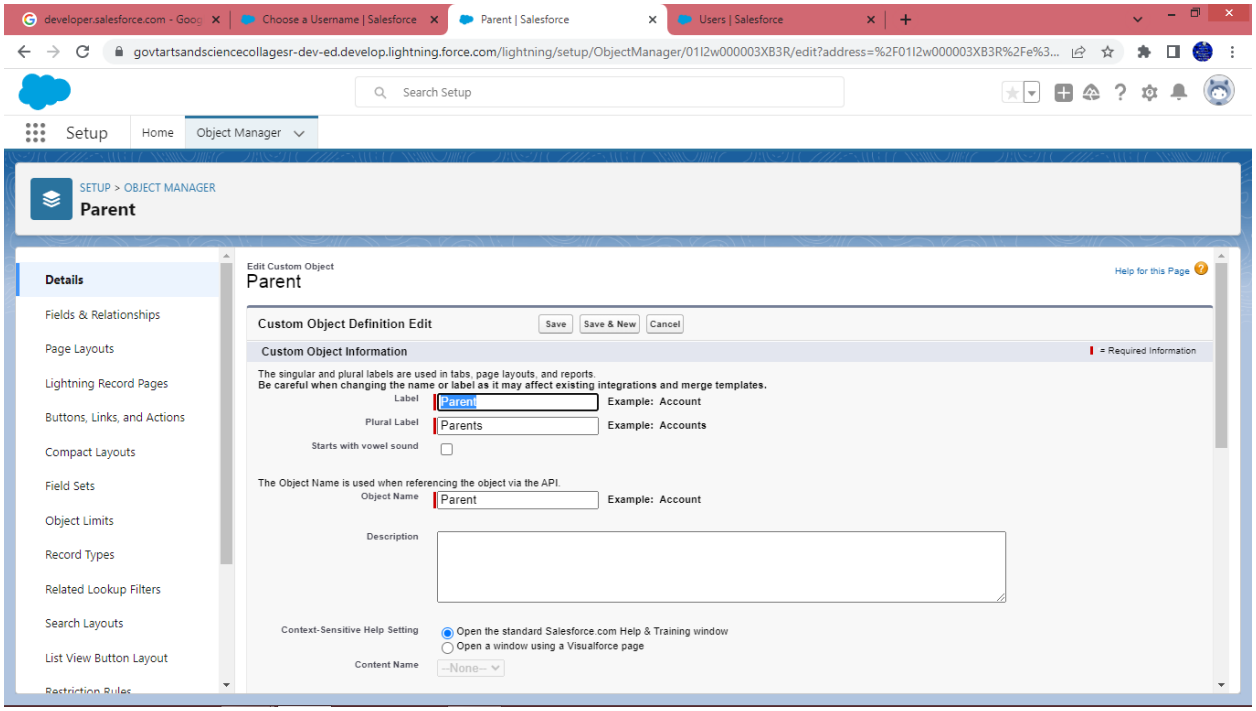
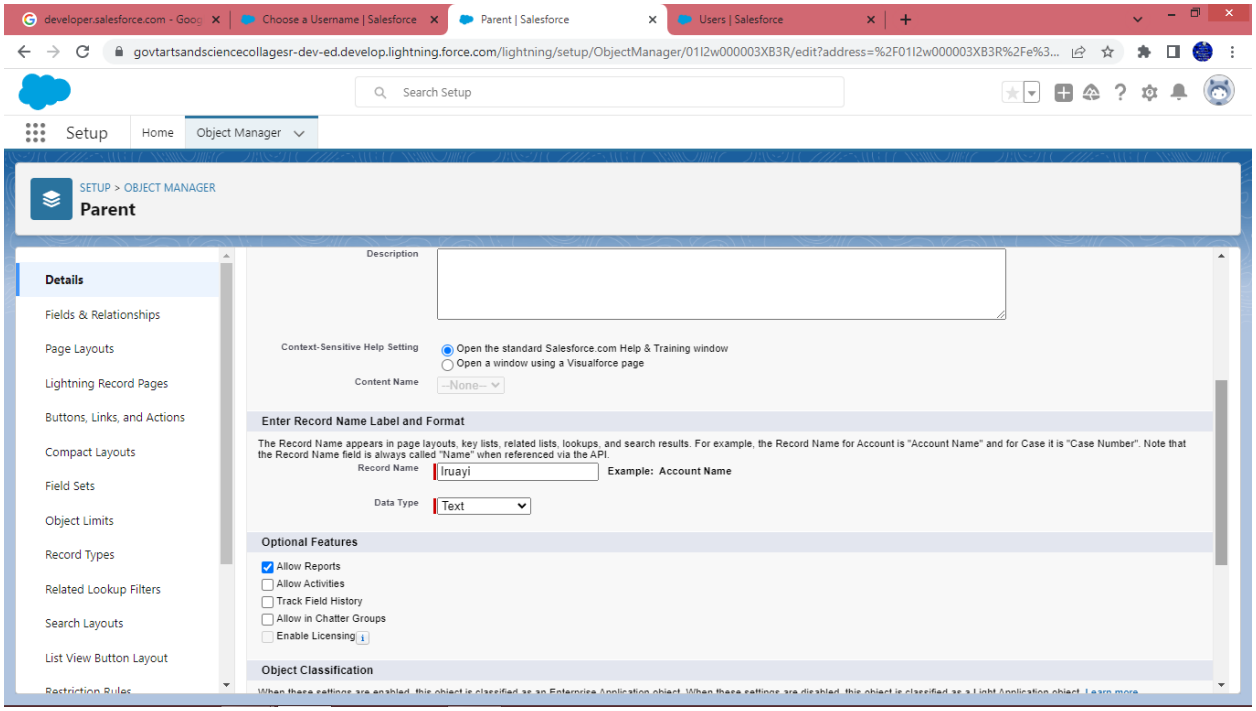
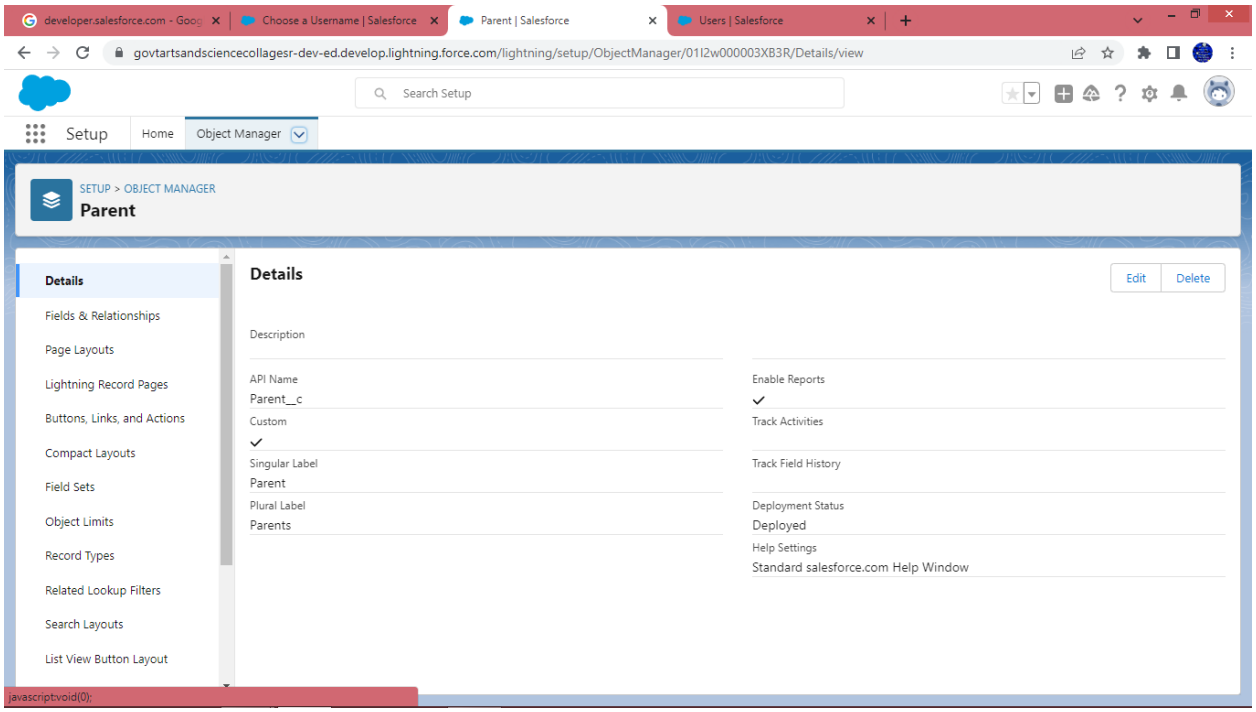
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
the Record Name field is always called "Name" when referenced via the API.
Record Name
mahes
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.



Activity 3: Create Parent Object

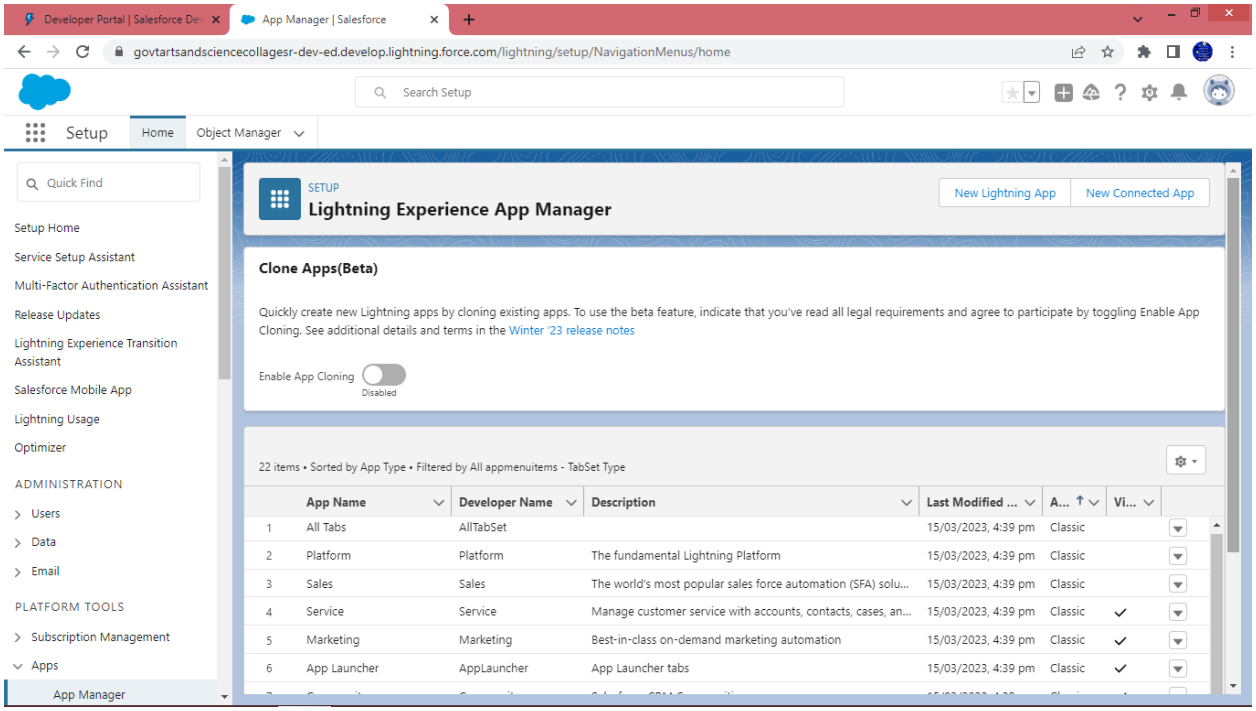


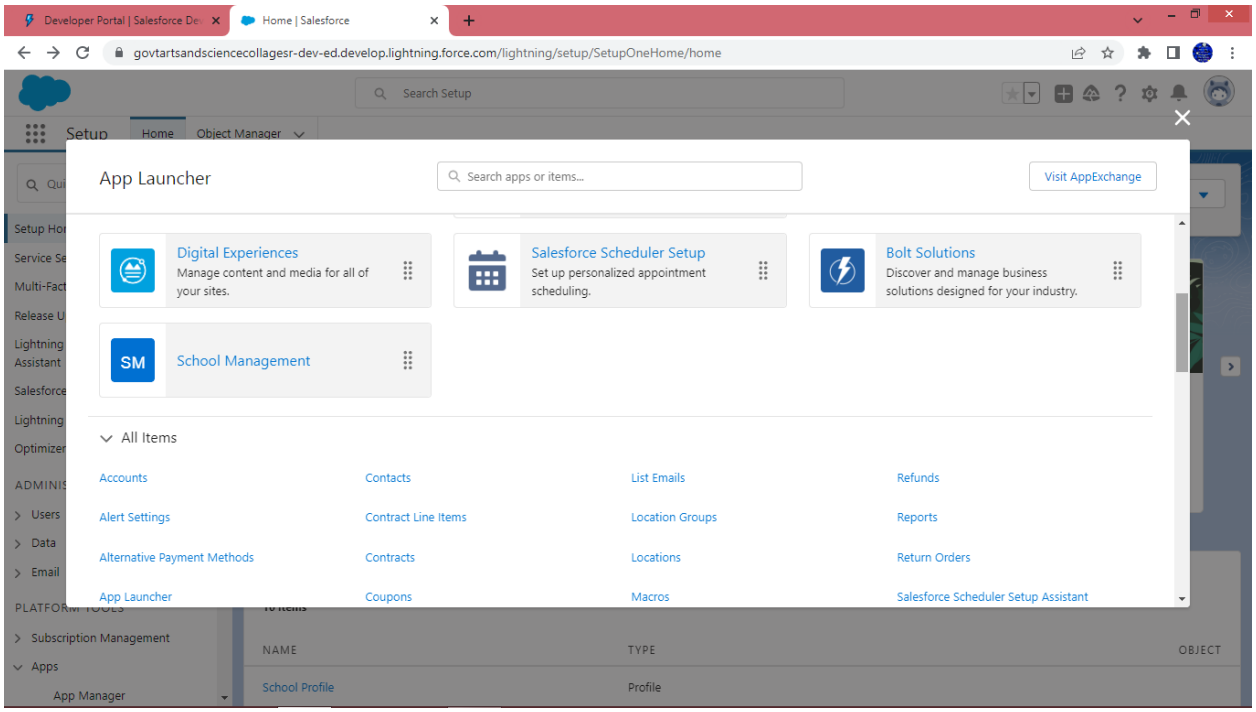




MILESTON-3: Lightning App

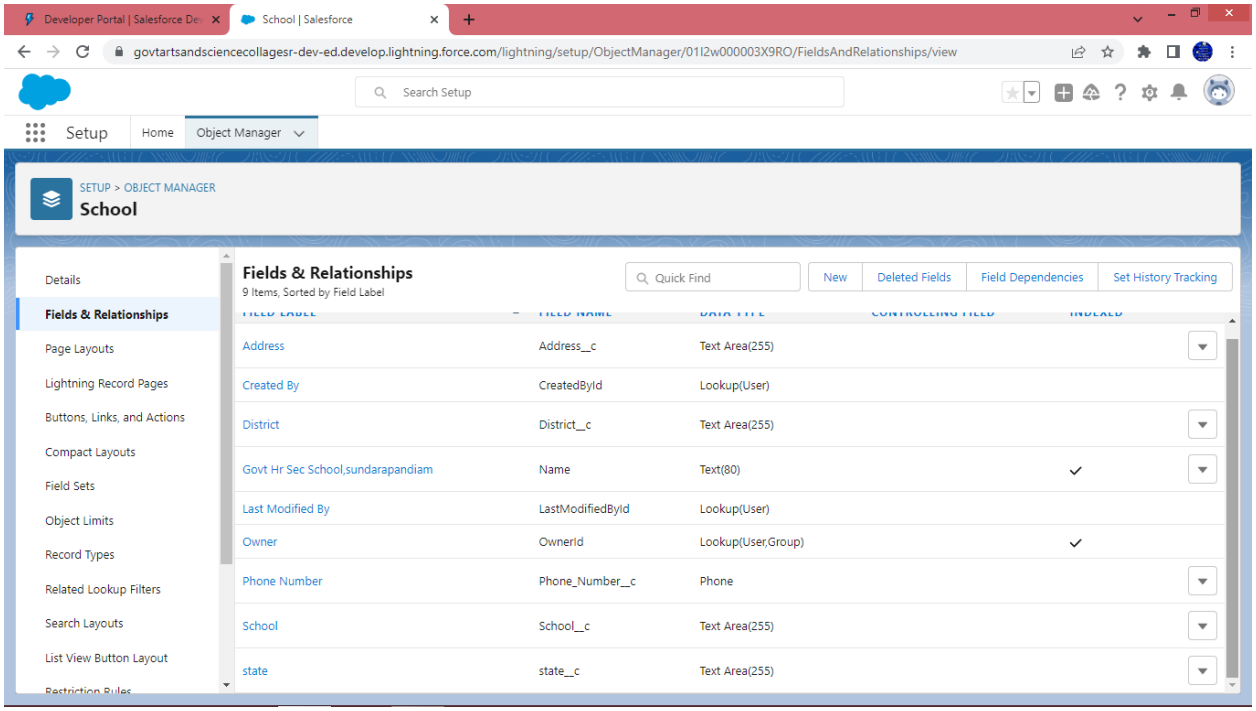
Activity: Create the school Management App





Milestone -4: Fields and Relationship

Activity: Create of fields for the school Object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Search Setup
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Buttons, Links, and Actions
Compact Layouts
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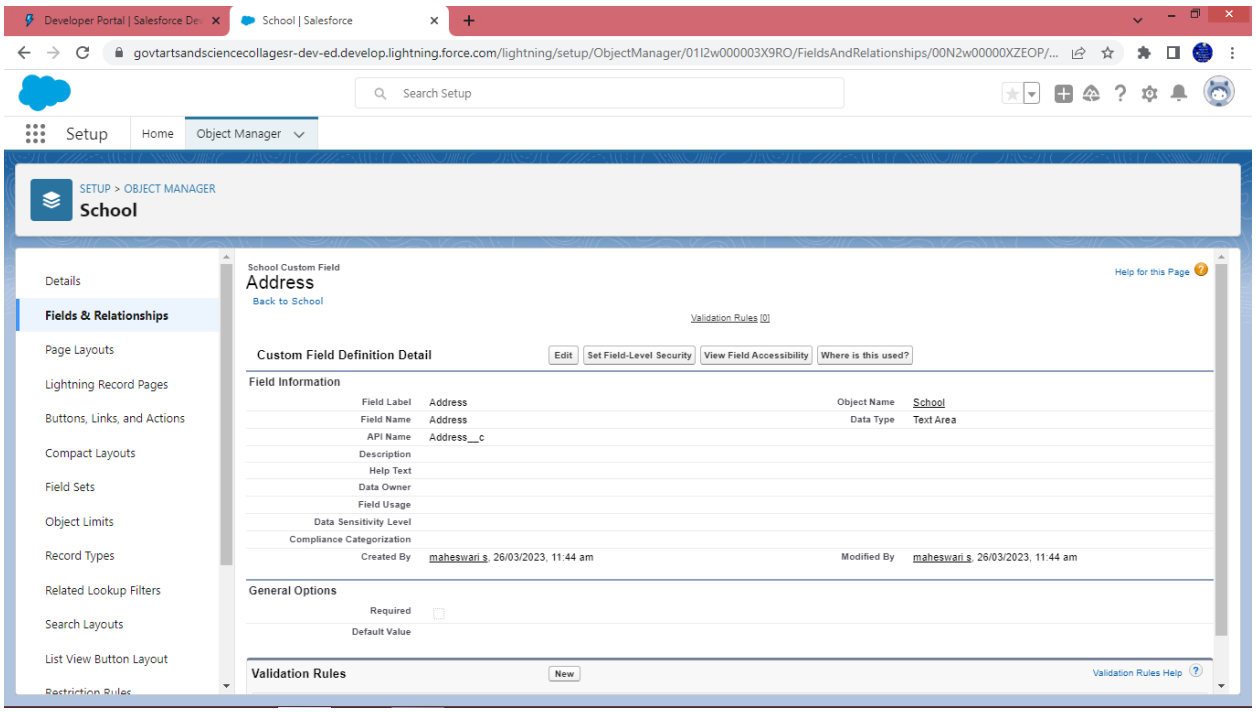
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
Address Address__c Text Area(255)
Created By CreatedById Lookup(User)
District District__c Text Area(255)
Govt Hr Sec School,sundarapandiam Name Text(80)
Last Modified By LastModifiedById Lookup(User)
Owner OwnerId Lookup(User,Group)
Phone Number Phone_Number__c Phone
School School__c Text Area(255)
state state__c Text Area(255)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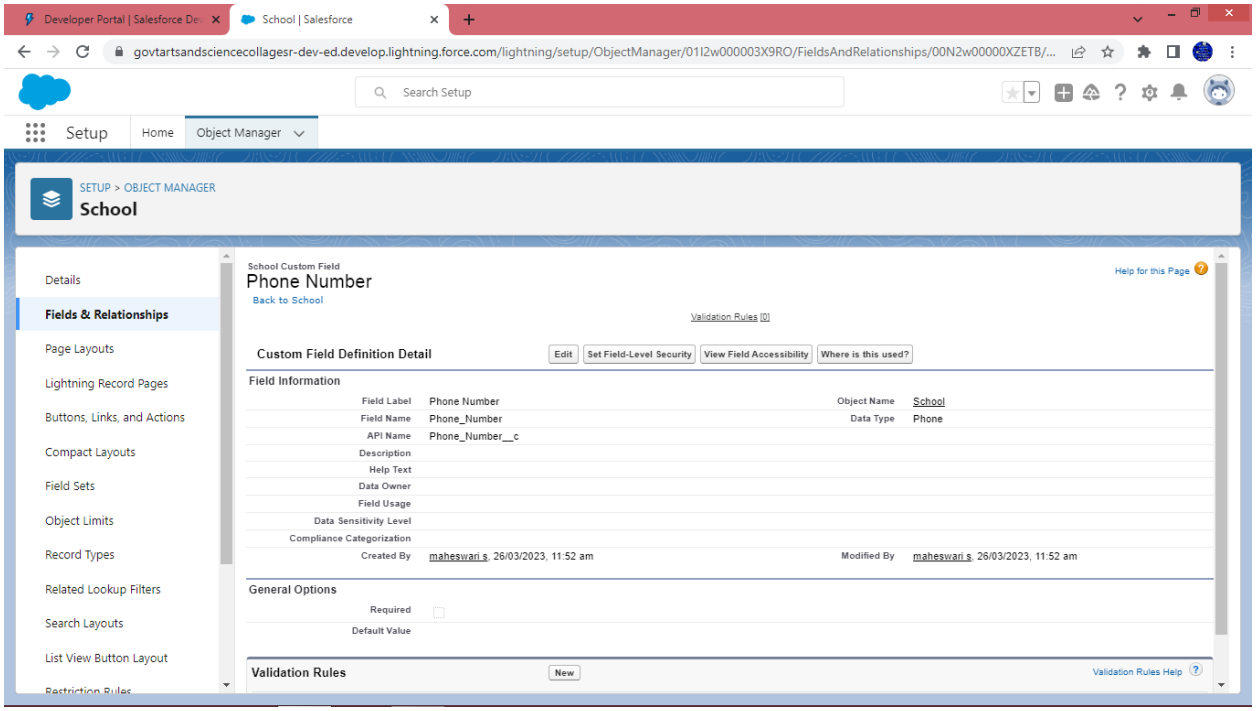
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
School Custom Field
Address
Back to School
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Address
Field Name Address
API Name Address__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By maheswari s, 26/03/2023, 11:44 am
Object Name School
Data Type Text Area
Modified By maheswari s, 26/03/2023, 11:44 am
General Options
Required
Default Value
Validation Rules
New
Validation Rules Help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List View Button Layout
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School Custom Field
Phone Number
Back to School
Help for this Page
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Custom Field Definition Detail
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Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Phone Number
Field Name Phone_Number
API Name Phone_Number__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By maheswari s, 26/03/2023, 11:52 am
Object Name School
Data Type Phone
Modified By maheswari s, 26/03/2023, 11:52 am
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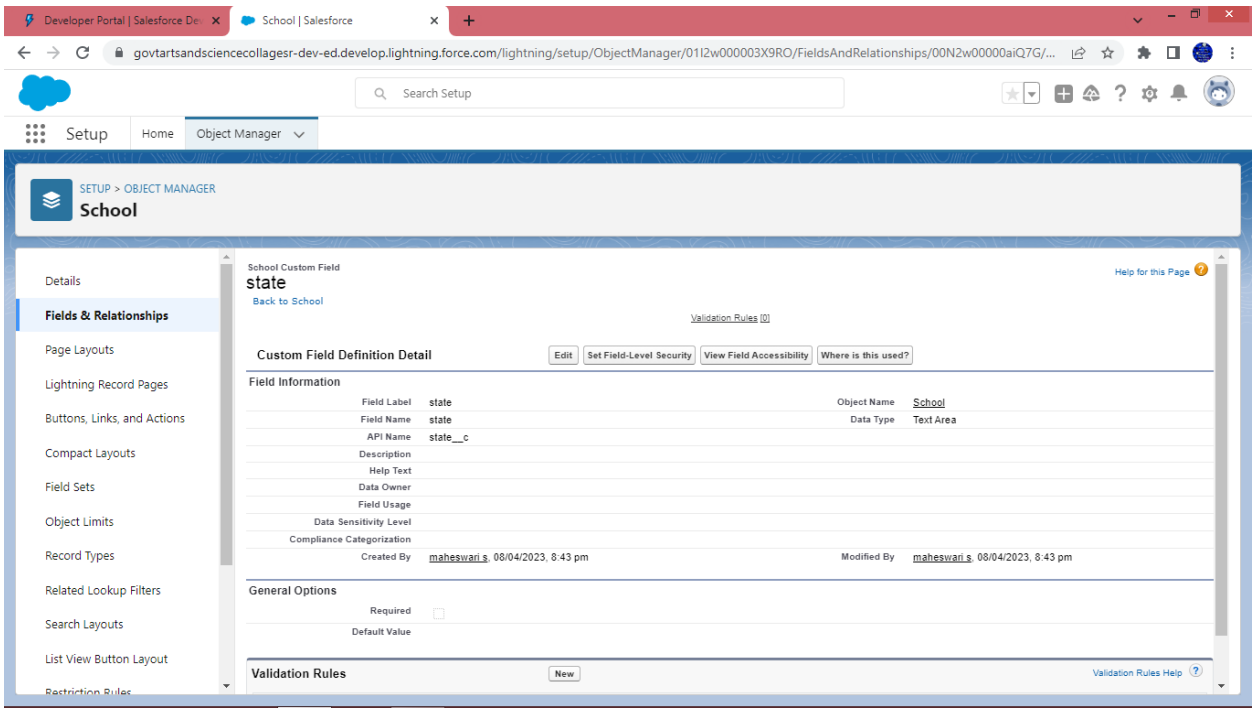
Default Value
Validation Rules
New
Validation Rules Help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Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
School Custom Field
state
Back to School
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label state
Field Name state
API Name state__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By maheswari s, 08/04/2023, 8:43 pm
Object Name School
Data Type Text Area
Modified By maheswari s, 08/04/2023, 8:43 pm
General Options
Required
Default Value
Validation Rules
New
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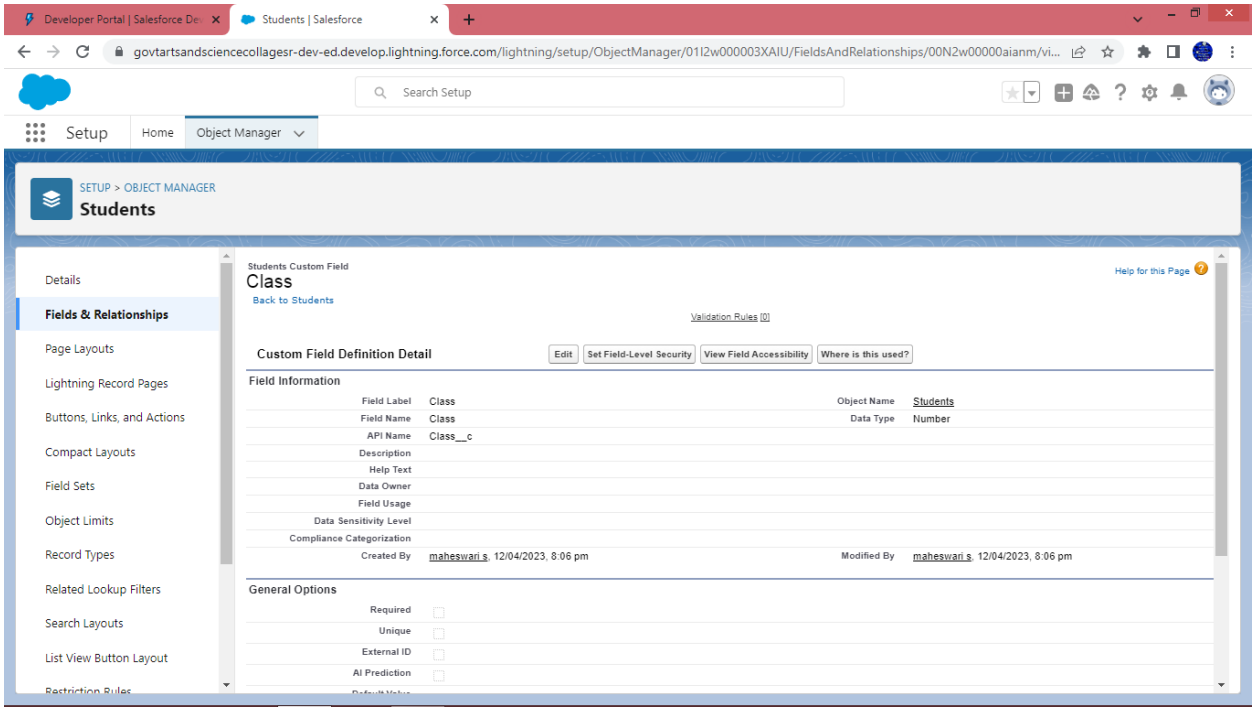
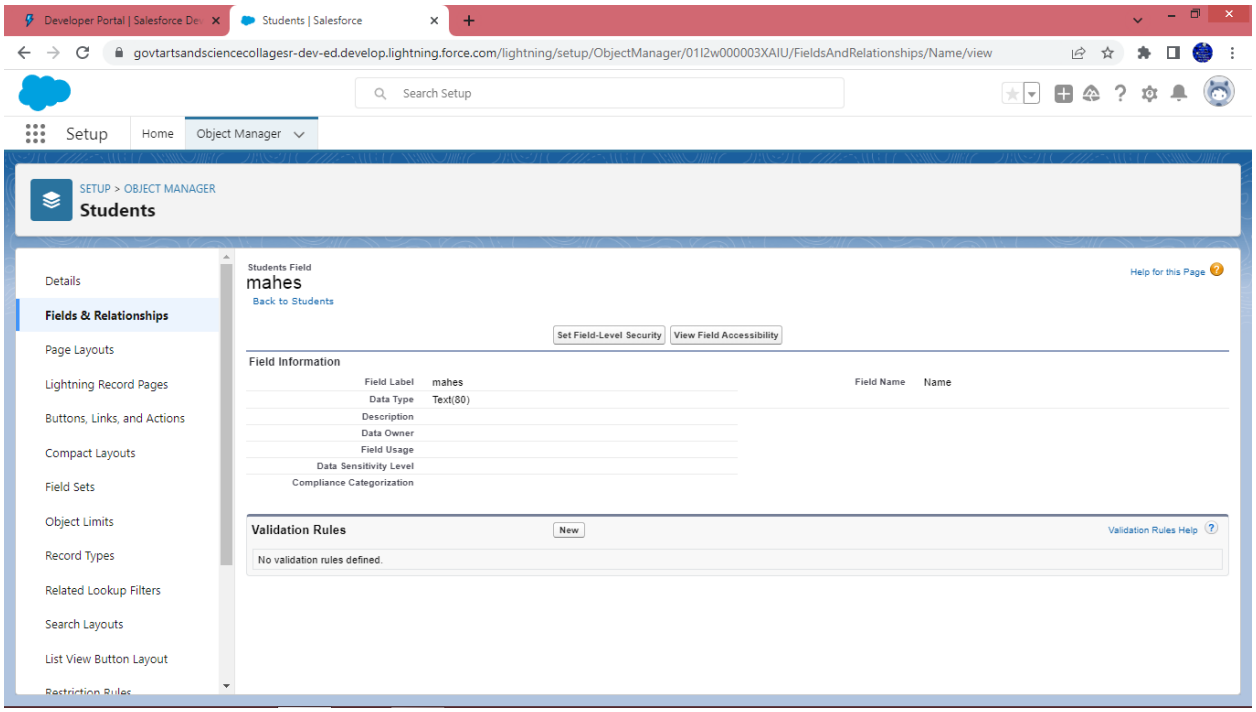
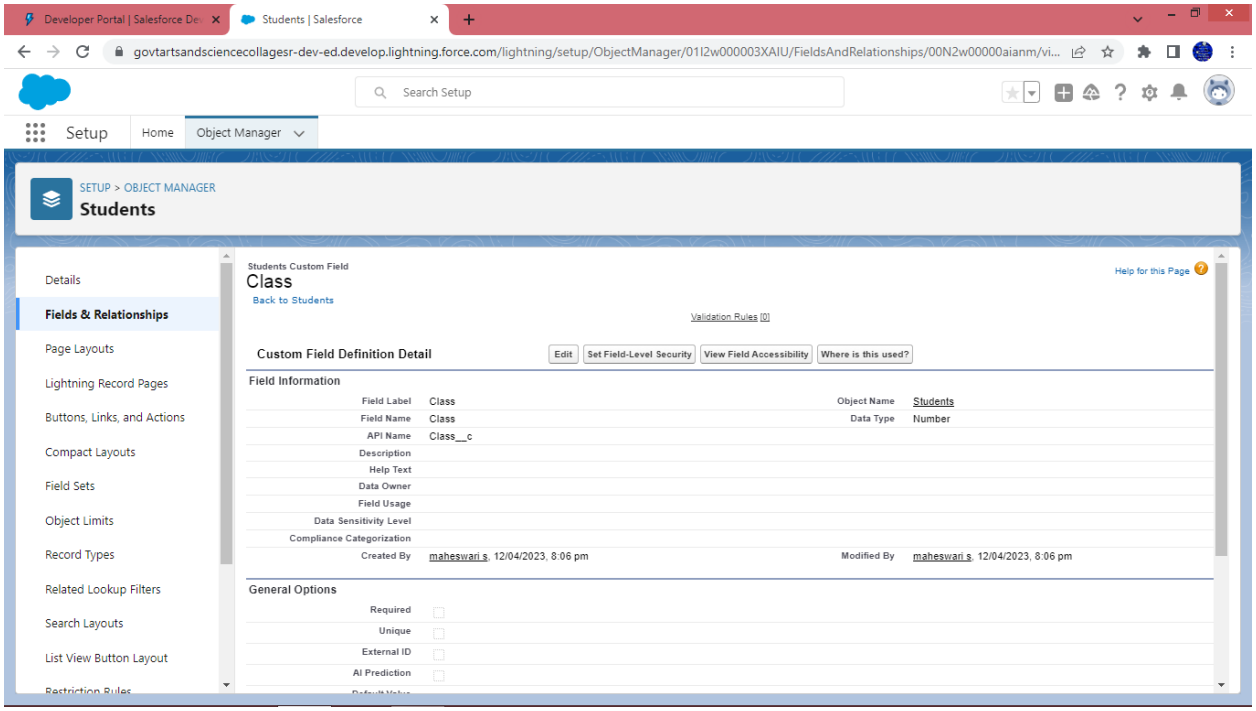
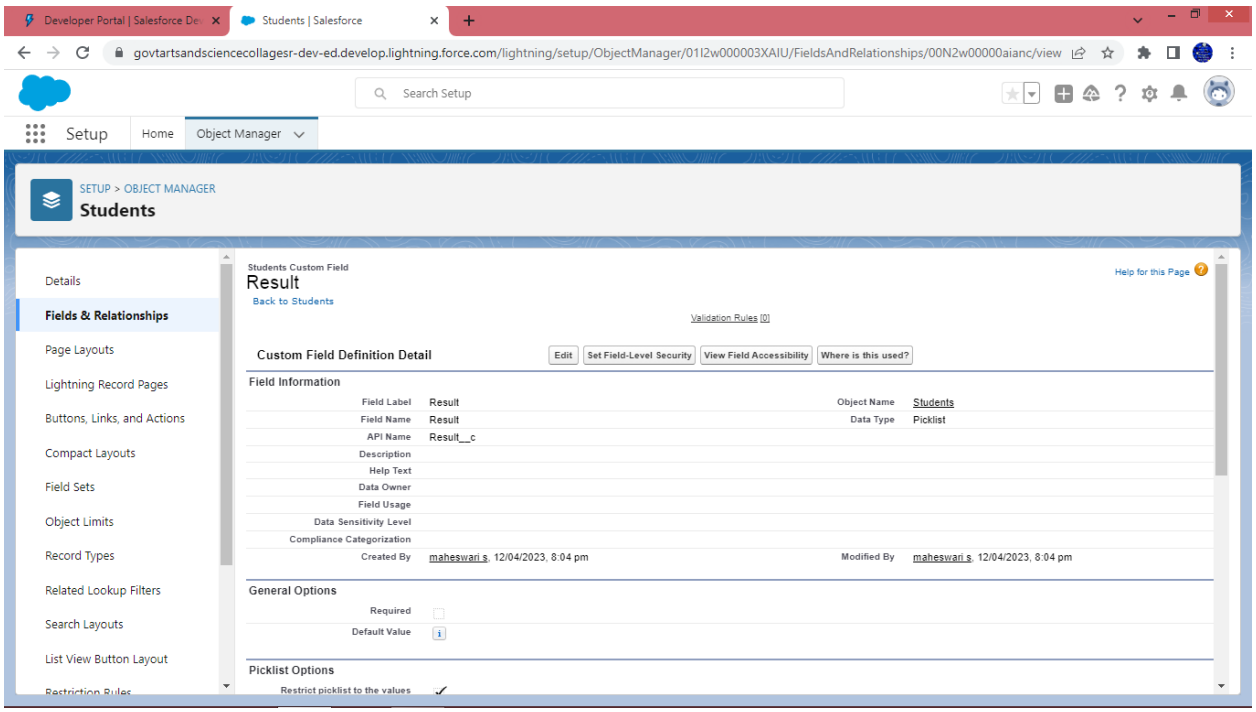


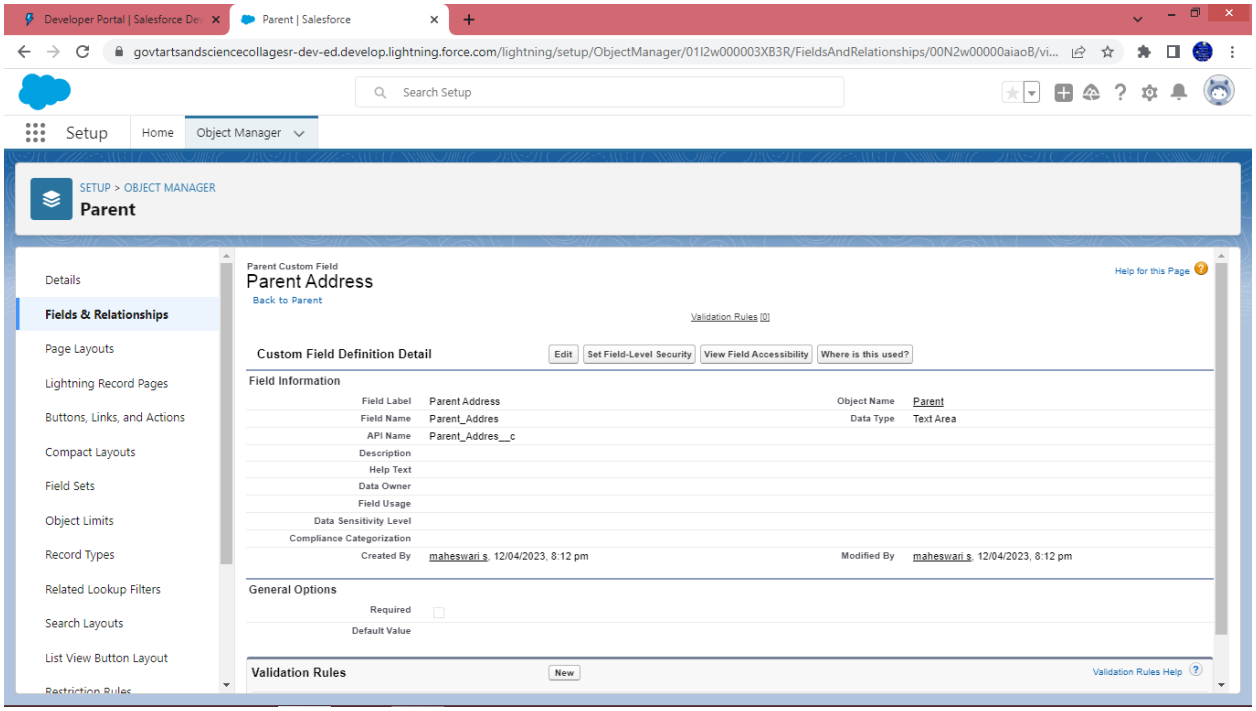
Activity-2: Creation of filed for the student object







Activity-3: Creation of fields for the parent object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Search Setup
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Object Manager
SETUP > OBJECT MANAGER
Parent
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Parent Custom Field
Parent Address
Back to Parent
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label
Parent Address
Object Name
Parent
Field Name
Parent_Addres
Data Type
Text Area
API Name
Parent_Addres__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By
maheswari s, 12/04/2023, 8:12 pm
Modified By
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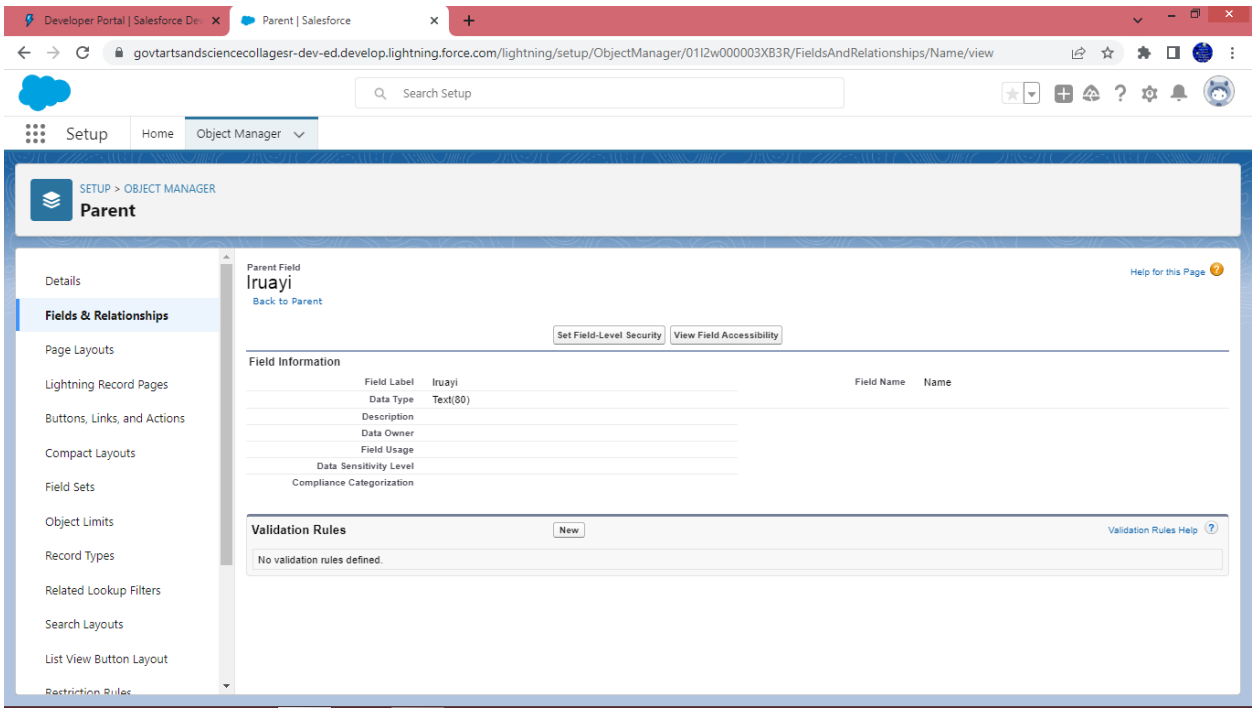
General Options
Required
Default Value
Validation Rules
New
Validation Rules Help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Validation Rules Help
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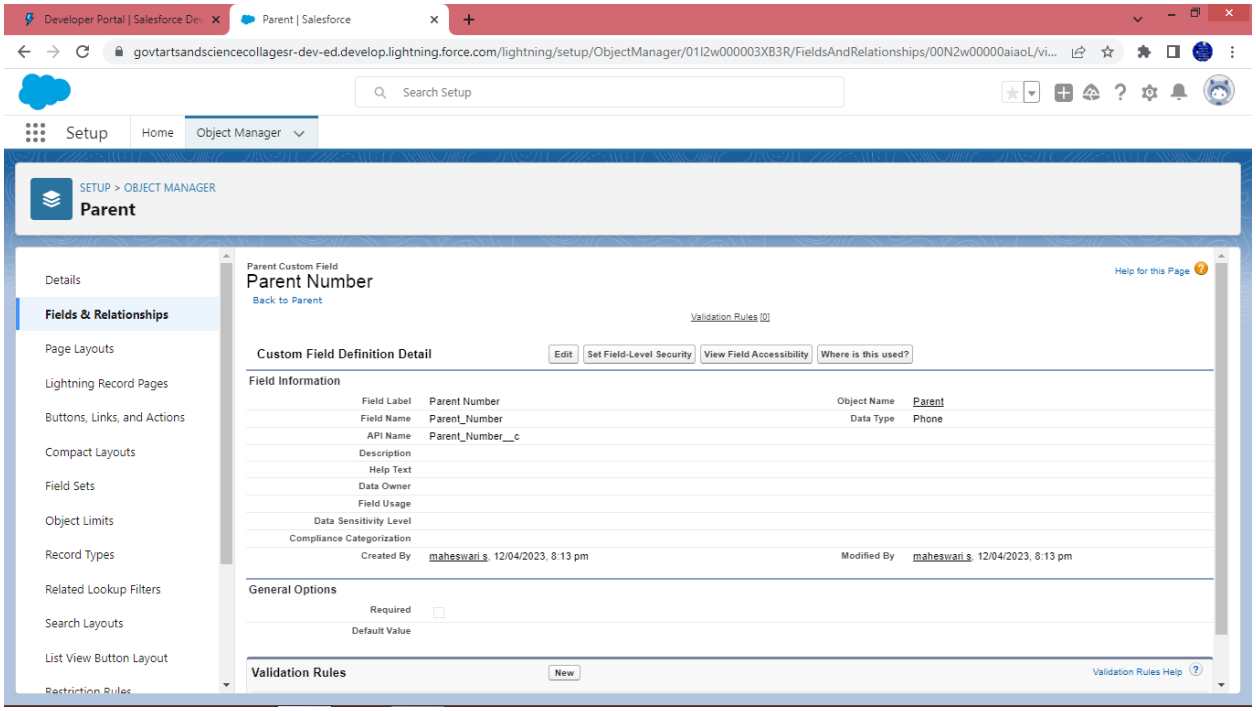
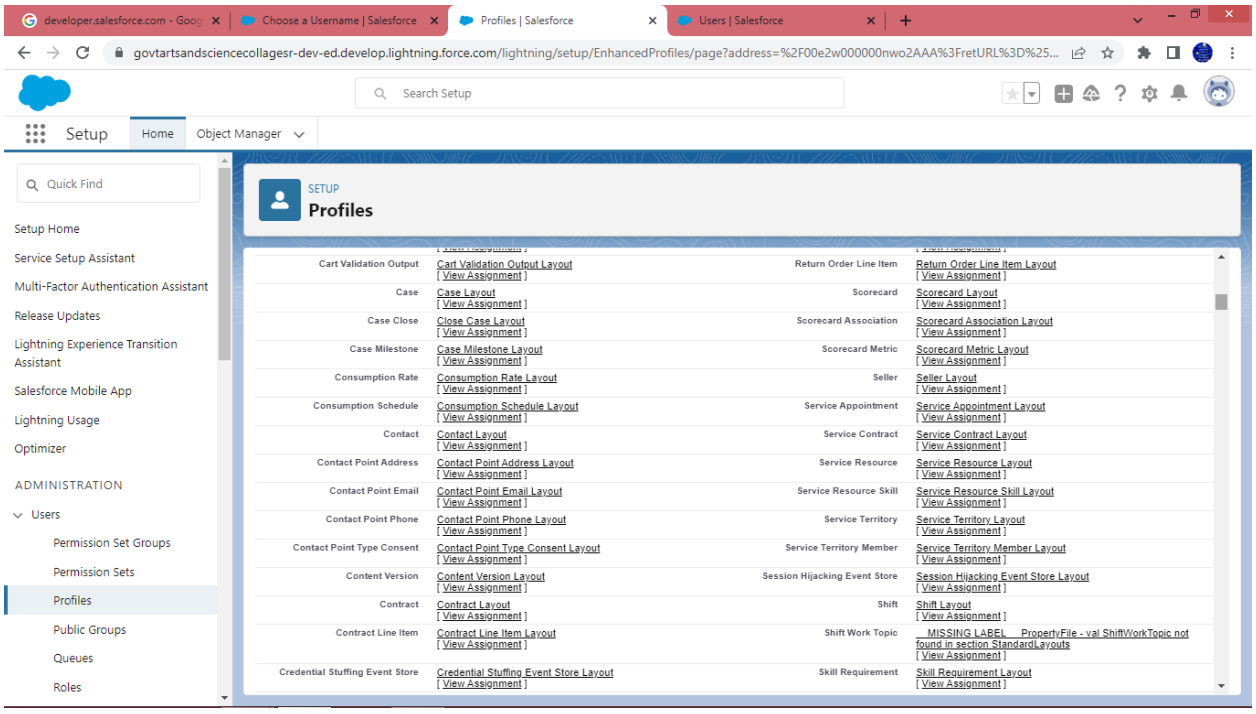
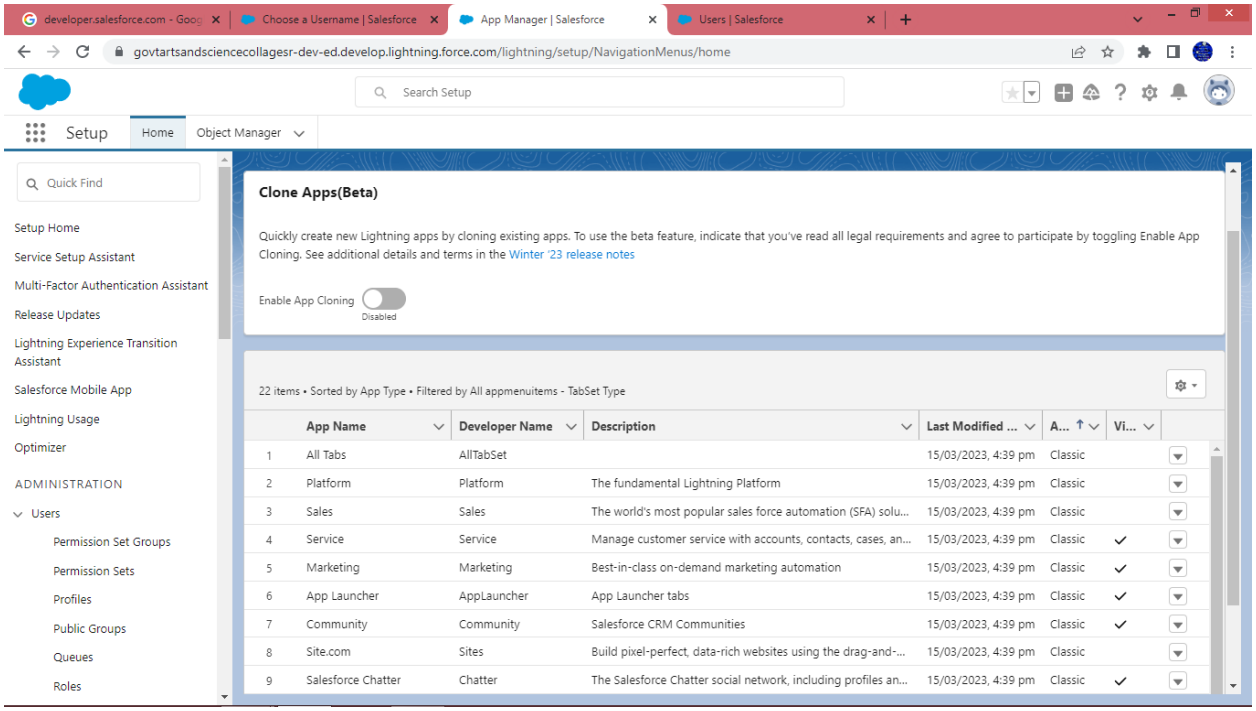


Milestone-5: Profile

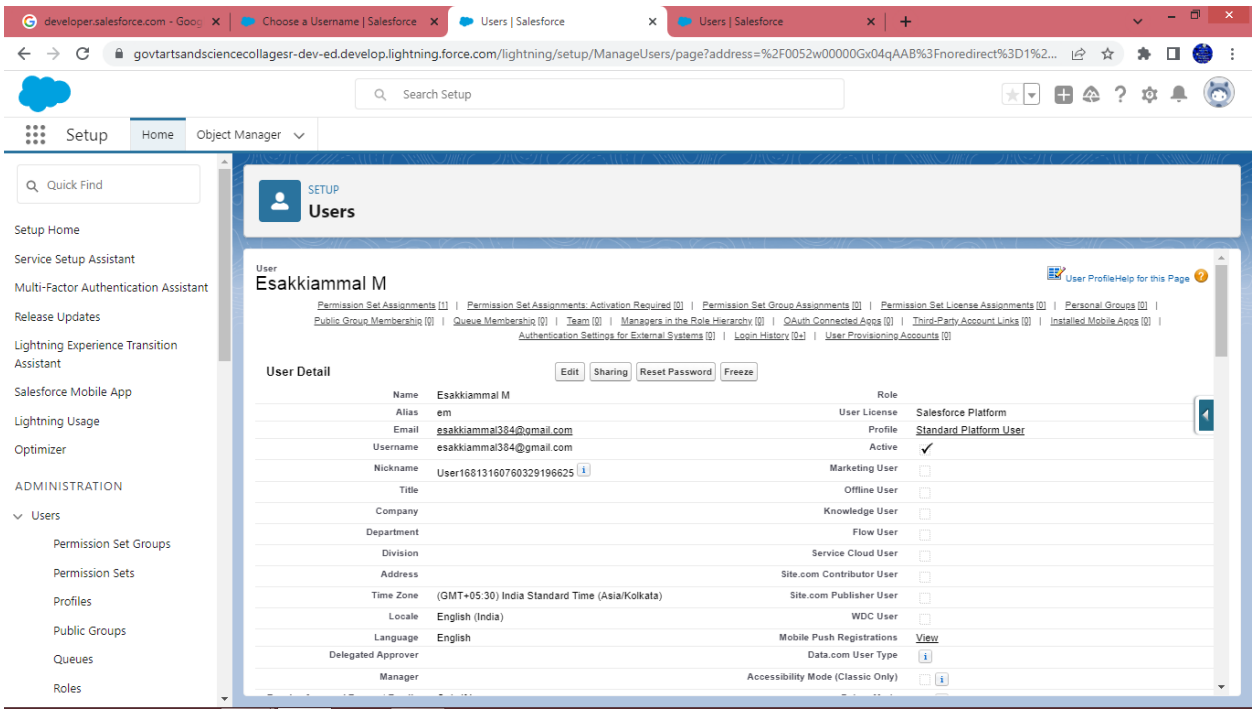
Activity: Creation on profile

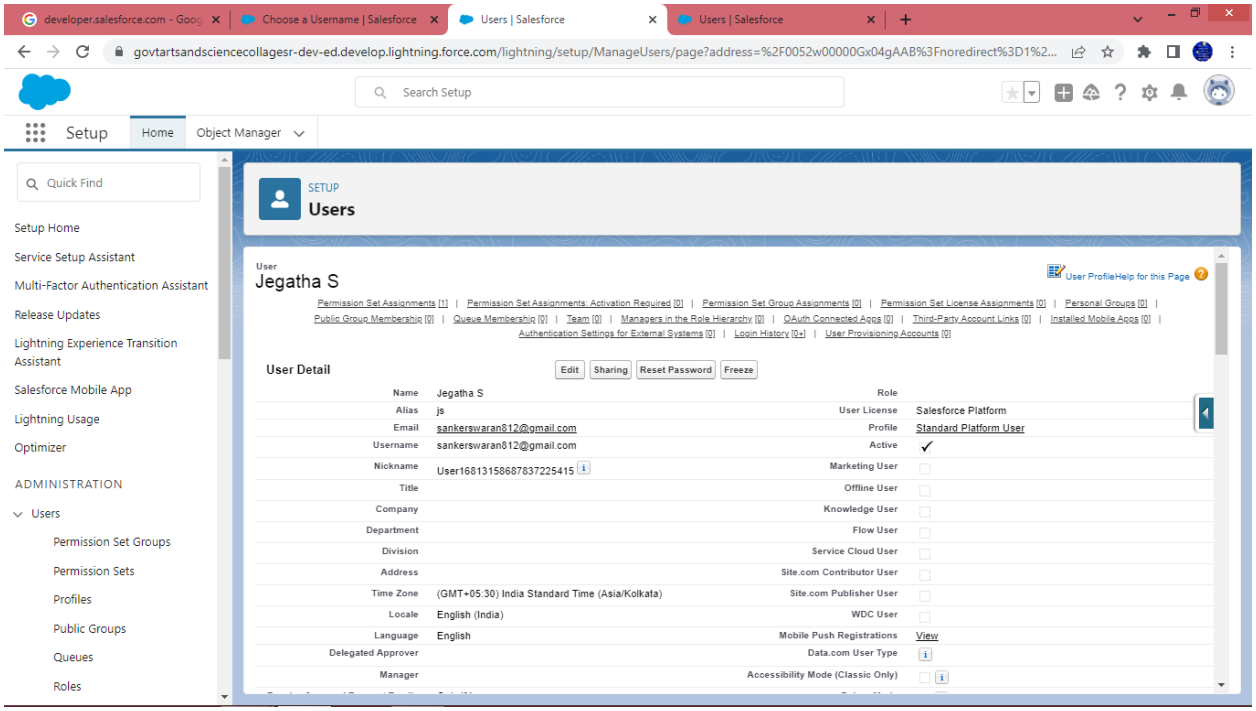




Milestone-6: Users

Activity: Creating Users

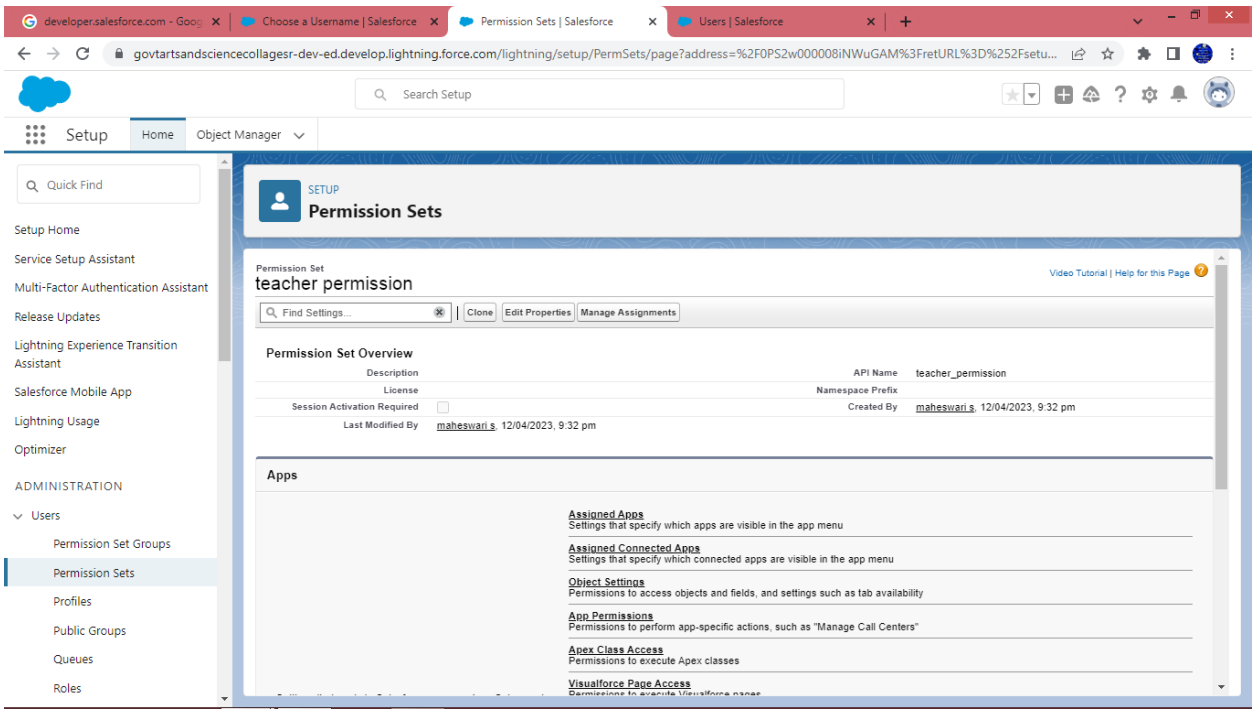


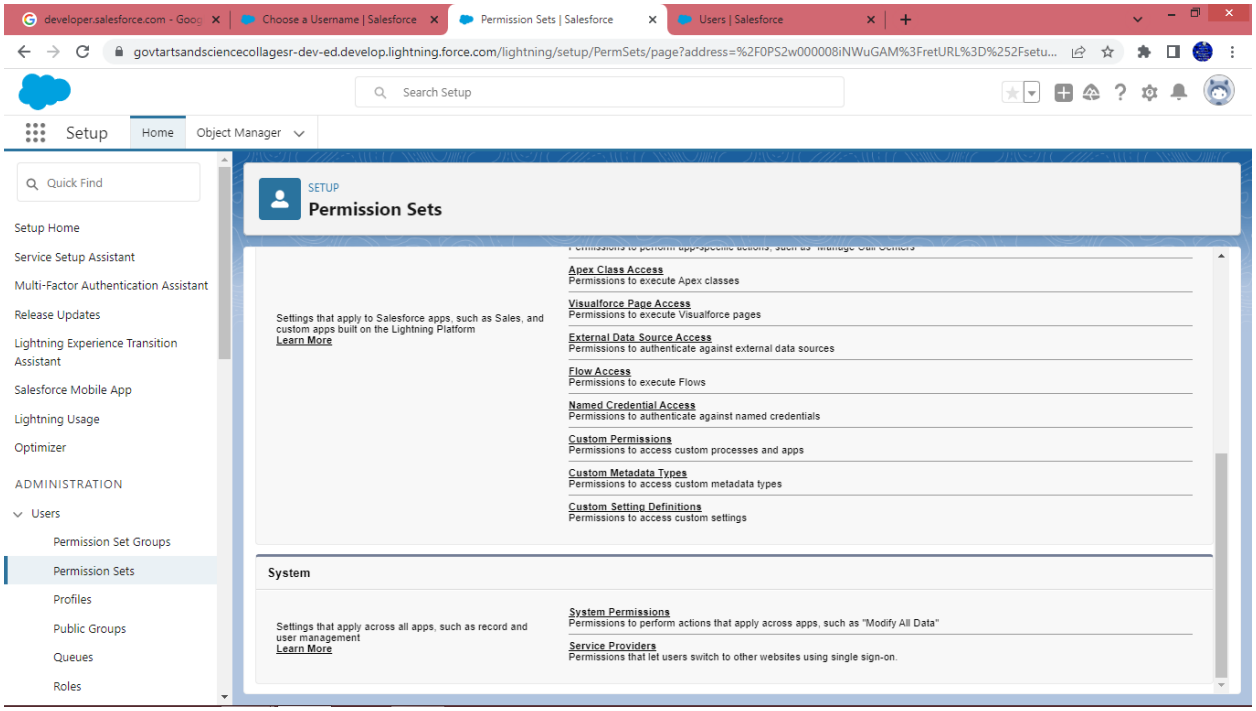


Milestone-7: Permission

Activity-1:

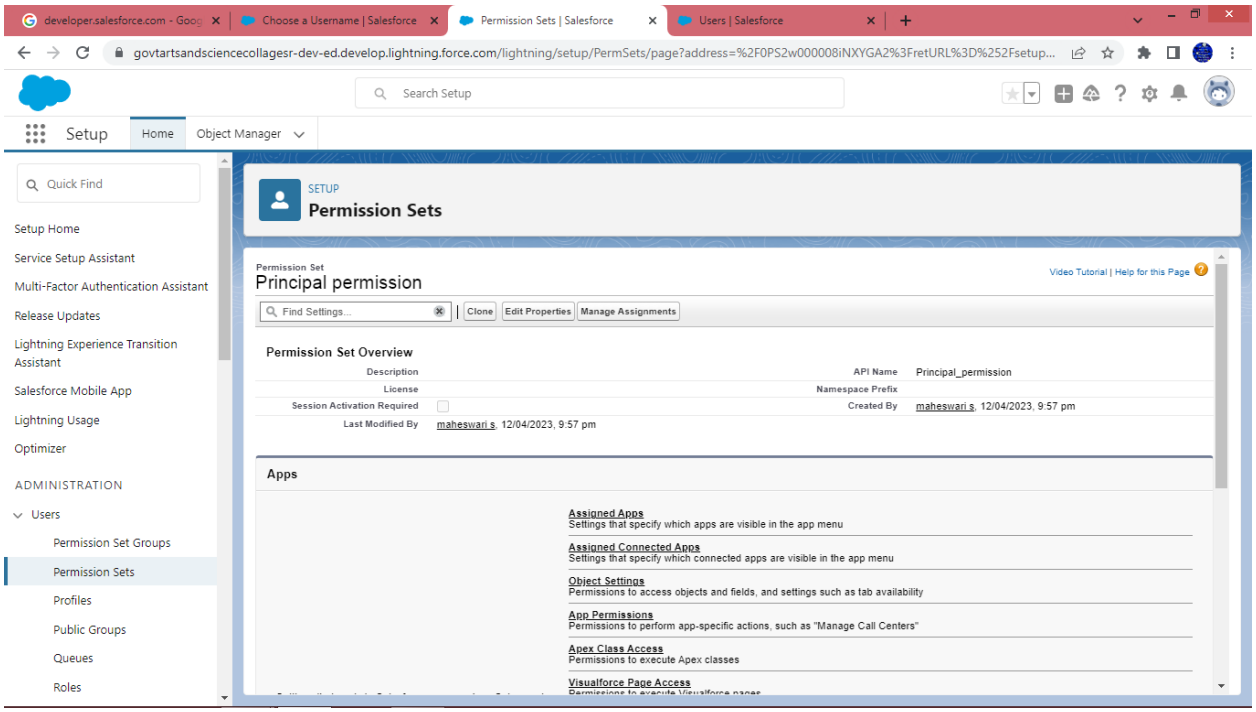
Permission sets 1:

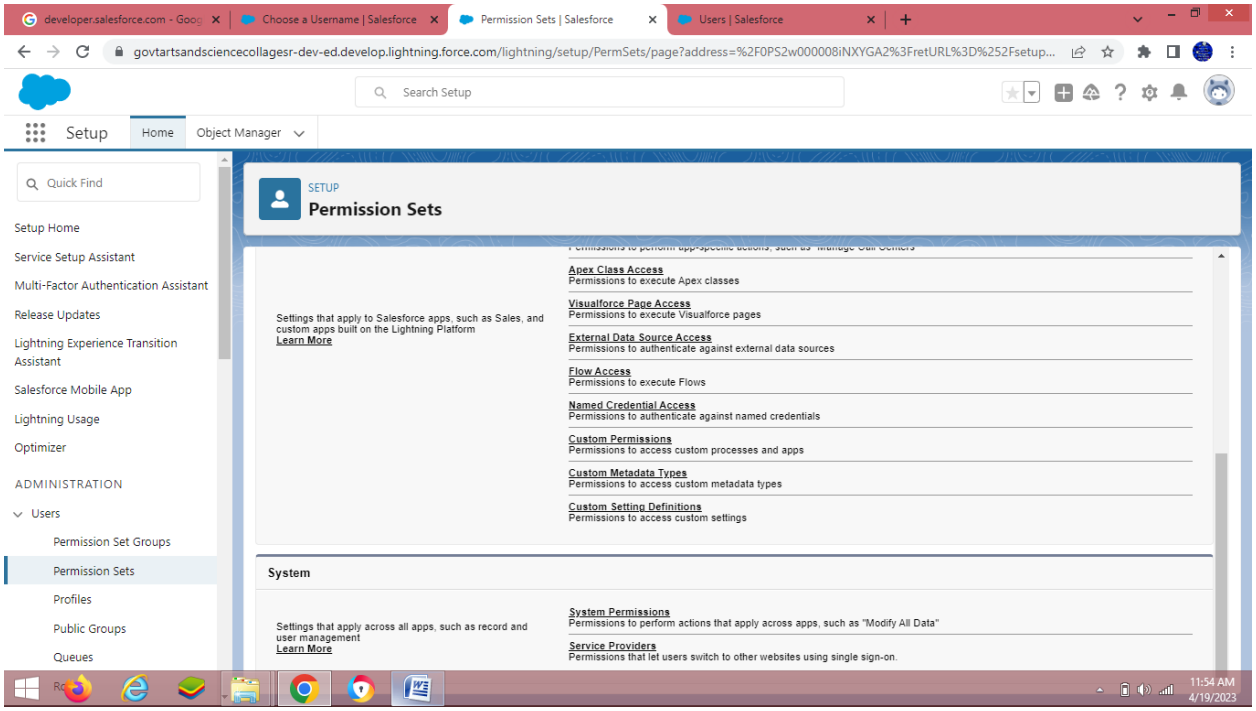




Activity-2:

Permission sets2:

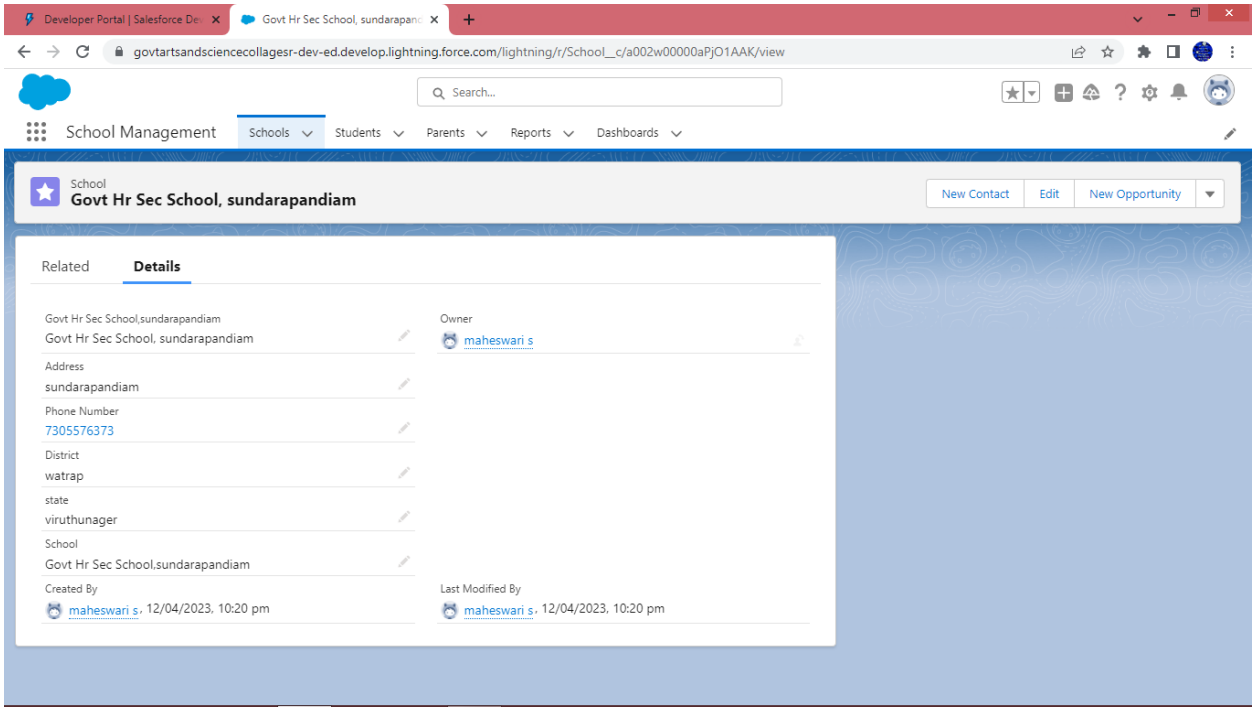


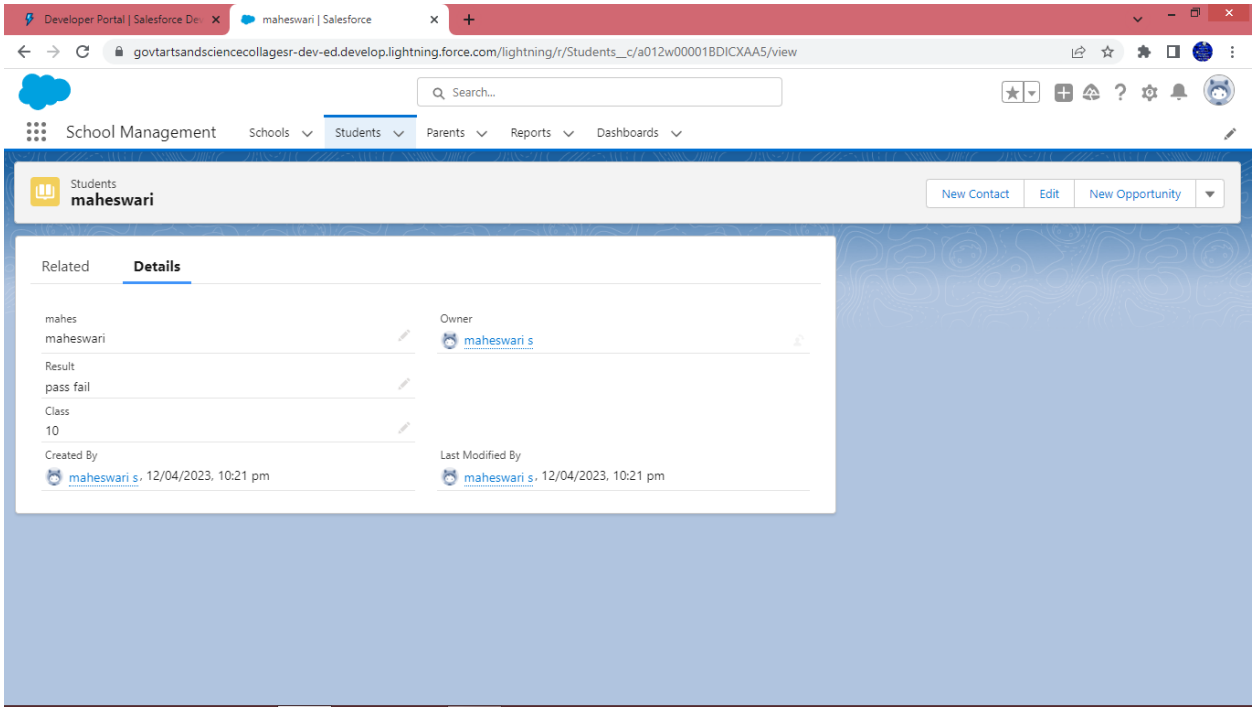


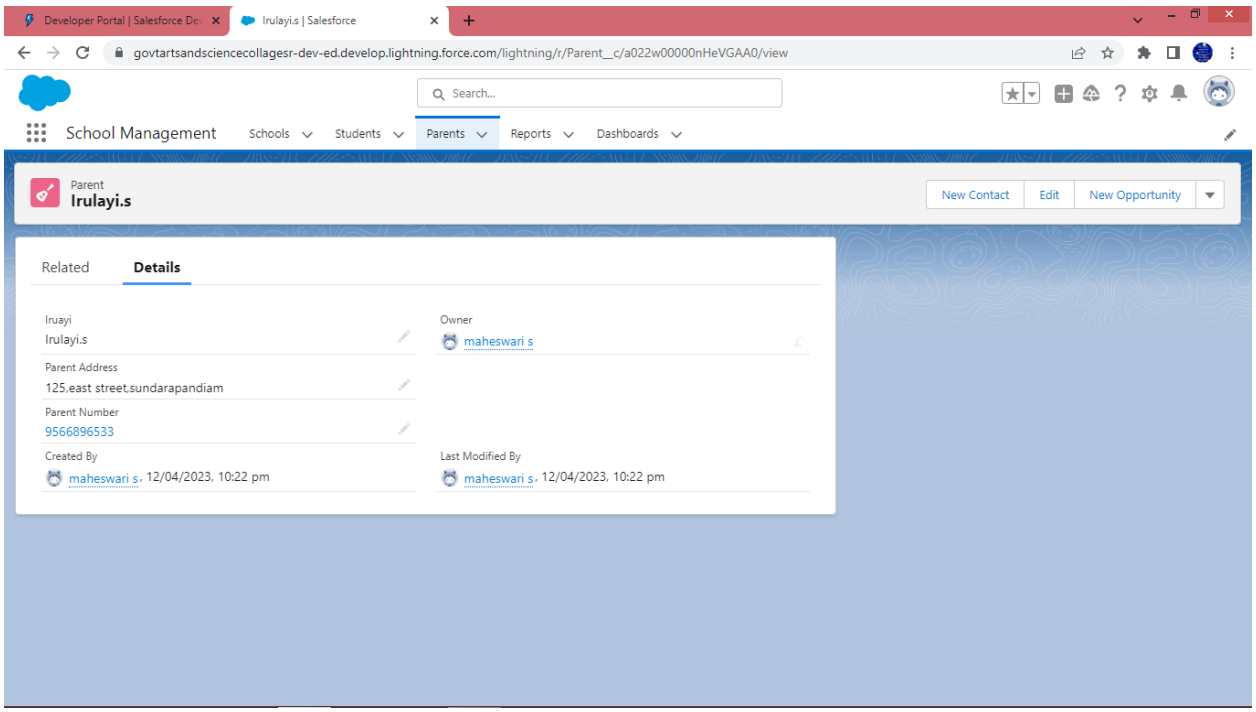
Mileston-8: Reports

Activity:

Reports:




Developer Portal | Salesforce De
maheswari | Salesforce
govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/r/Students__c/a012w00001BDICXAA5/view
Search...
School Management
Schools
Students
Parents
Reports
Dashboards
Students
maheswari
New Contact
Edit
New Opportunity
Related
Details
mahes
maheswari
Owner
maheswari s
Result
pass fail
Class
10
Created By
maheswari s, 12/04/2023, 10:21 pm
Last Modified By
maheswari s, 12/04/2023, 10:21 pm


Developer Portal | Salesforce De
Irulayi.s | Salesforce
govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/r/Parent__c/a022w00000nHeVGAA0/view
Search...
School Management
Schools
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Dashboards
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New Contact
Edit
New Opportunity
Related
Details
Iruayi
Irulayi.s
Owner
maheswari s
Parent Address
125,east street,sundarapandiam
Parent Number
9566896533
Created By
maheswari s, 12/04/2023, 10:22 pm
Last Modified By
maheswari s, 12/04/2023, 10:22 pm

Project Report

Project Title: A CRM APPLICATION FOR SCHOOL/COLLEGE

1. Introduction:

1.1 Overview

It's Provide Real-time Knowledge for the entire Student.

1. Real time sales force project
2. Object & Relationship in sales force
3. Profile
4. Users
5. Lightning App
6. Permission sets
7. Reports

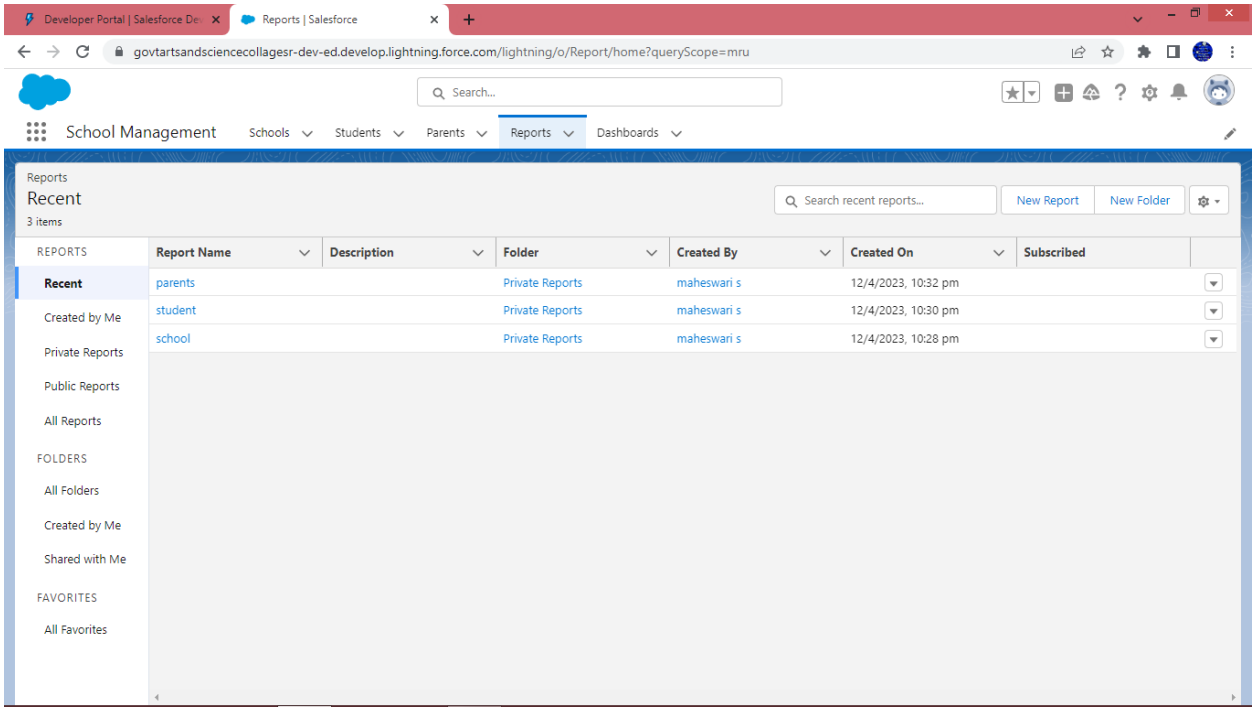
1.2 Purpose

1 .This Project used to educational system.

2. I achieved of every object details like school, parent & student.

2. Problem Definition & Design Thinking:

2.1 Empathy map



4. Trailhead profile public URL

1. Team leader: https://trailblazer.me/id/s19sbco117

2. Team Member1- https://trailblazer.me/id/mahes1096

3. Team Member2-https://trailblazer.me/id/esakm4

4. Team Member3- http://trailblazer.me/id/spandeeswari

5. ADVANTAGES & DISVANTAGES

1. Its technology project.

2. Everyone used this project and edited the object.

3 .Multi users used this project of this disadvantage.

4. So single user used this project of best solution.

6. APPLICATION

1. Sales force is your customer success platform, designed to help you sell, services, market and connect with your customer.

7. CONCLUSION

1. Creating developer account, object, and school management.

2. Create the report document.

3. Finding every personal detail.

8. FUTURE SCOPE

1. It can be made in schools and college.

2. It can be technology important of education.