

**Dr. KALAI GNAR GOVERNMENT ARTS COLLEGE**

**KULITHALAI – 639120**

**DEPARTMENT OF PHYSICS**

**NAAN MUDHALVAN – SMART BRIDGE PROJECT**

**PROJECT TITLE : A CRM Application for Schools/Colleges**

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## **INTRODUCTION**

Salesforce is a modern cloud computing technology, which is available on cloud, no need to install any software as well as no hardware required. You can develop our own applications as well as need any application on demand and then you can buy from app exchange. App Exchange is a market place to sell our custom applications as well as to buy applications from app exchange easily Salesforce is a leading CRM (Customer Relationship Management) software which is served form cloud. It has more than 800 applications to support various features like generating new leads, acquiring new leads, increasing sales and closing the deals. It is designed to manage the organization's data focused on customer and sales details. It also offers features to customize its inbuilt data structures and GUI to suit the specific needs of a business. More recently, it has started offering the IOT (internet of things) connectivity to the CRM platform.

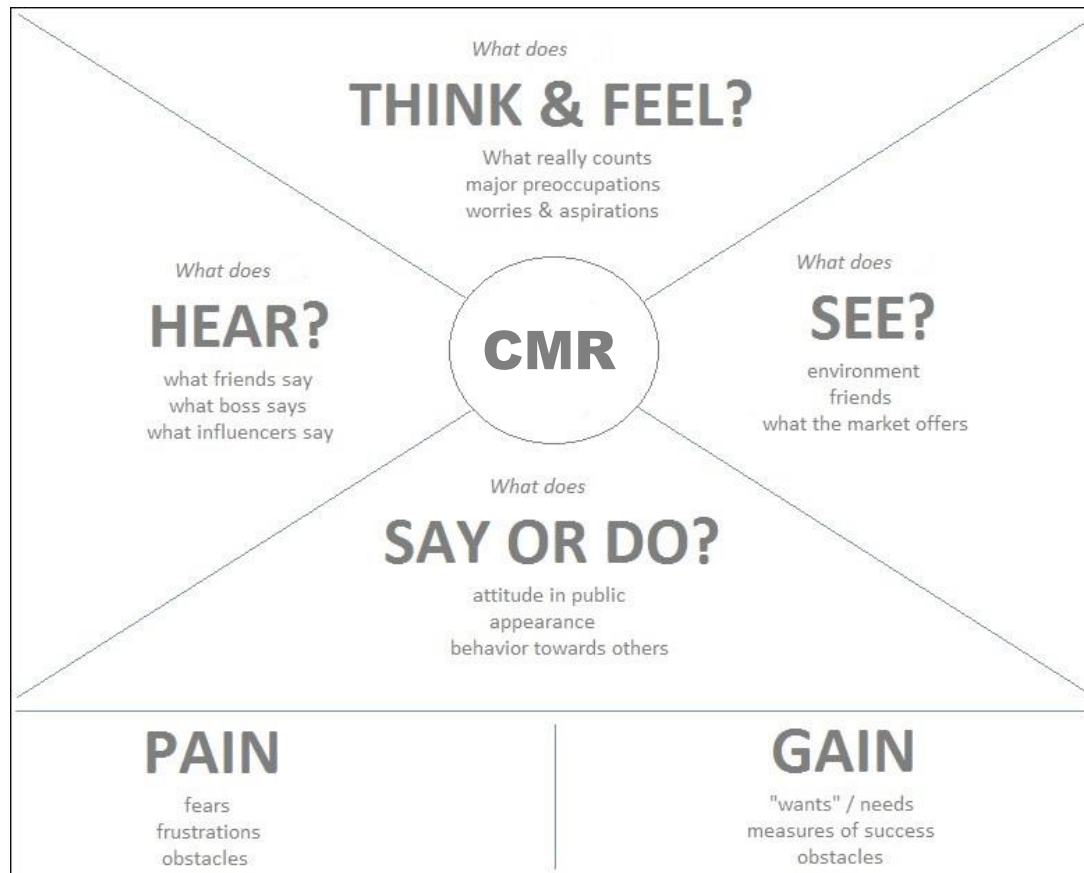
The design and implementation of the system is to provide service in institute and colleges. College Staff uploads attendance, results, share subject notes and college notifications through a secure, online interface using Salesforce. All data will be stored on the Salesforce cloud managed by the college Administrator. This system will decreases the paperwork and time needed to access student records. Previously, college relied heavily on paper records for this initiative which had its own disadvantages. This system provides a simple interface for the maintenance of student information. Achieving this objective is difficult using a manual system as the information are scattered, can be redundant and collecting relevant information may be very time consuming. Our proposed system ensures to overcome these limitations. There is another part which is feedback, the student can give the

feedback at anytime from anywhere to faculty. This feedback can be reviewed by the admin or the management committee of the institute through which the confidentiality of the feedback of the faculty can be maintained. This application is developed for daily student attendance in colleges and institutes. The teachers can send the attendance summary and feedback about the students to their parents. It can also be useful in an organization or company at a certain limit not the whole application.

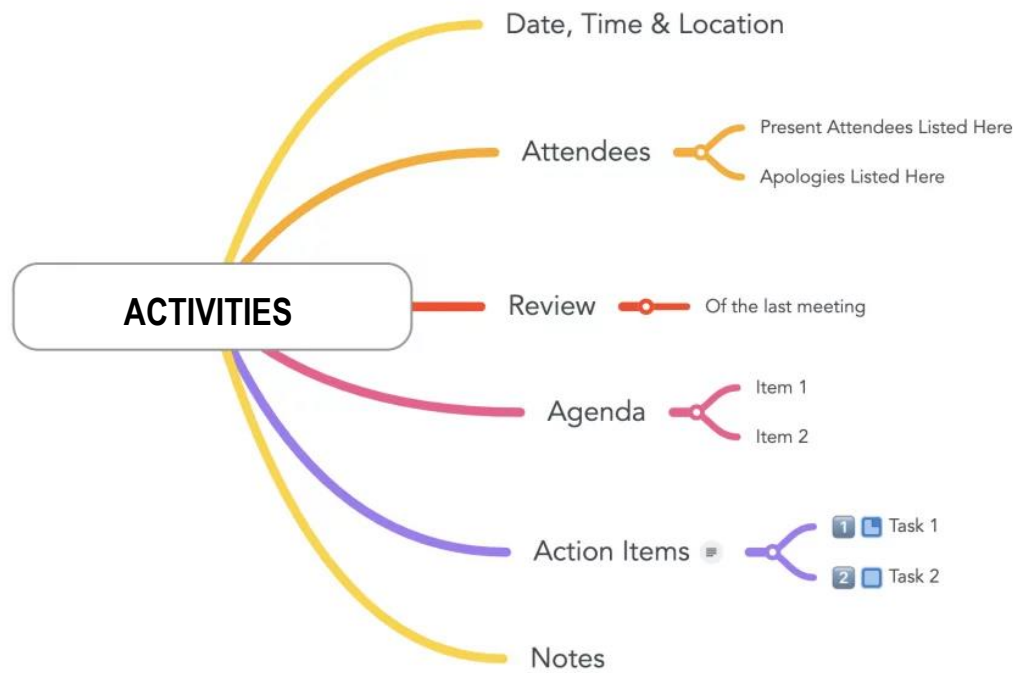
### **OVERVIEW:**

- Build a lightning app, add tabs and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.

## EMPATHY MAP



## BRAIN STORMING MAP



## Milestone 1 – Create Salesforce Org:

### Creating Developer Account Creating a developer org in Salesforce.

Developer Edition Signup | Sales | x

developer.salesforce.com/signup

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First Name\* LIVEEN

Last Name\* V

Email\* liveen1301@gmail.com


Role\* Developer

Company\* Dr. Kalaignar Government Arts College, Kulithali

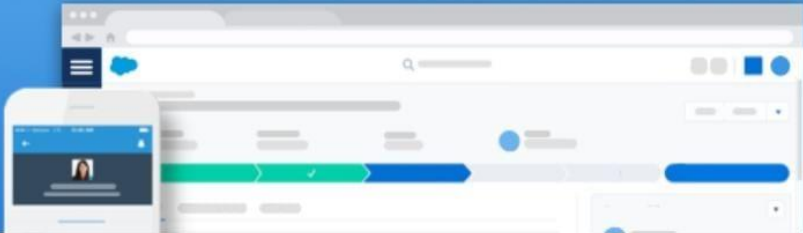
Type here to search

36°C Sunny 7:25 PM 12-Apr-23

## Account Activation



Thanks for signing up with Salesforce!



Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:

<https://drkalaingovernmentarts64-dev-ed.develop.my.salesforce.com>

Username:

[llmn1234@gmail.com](mailto:llmn1234@gmail.com)

Again, welcome to Salesforce!

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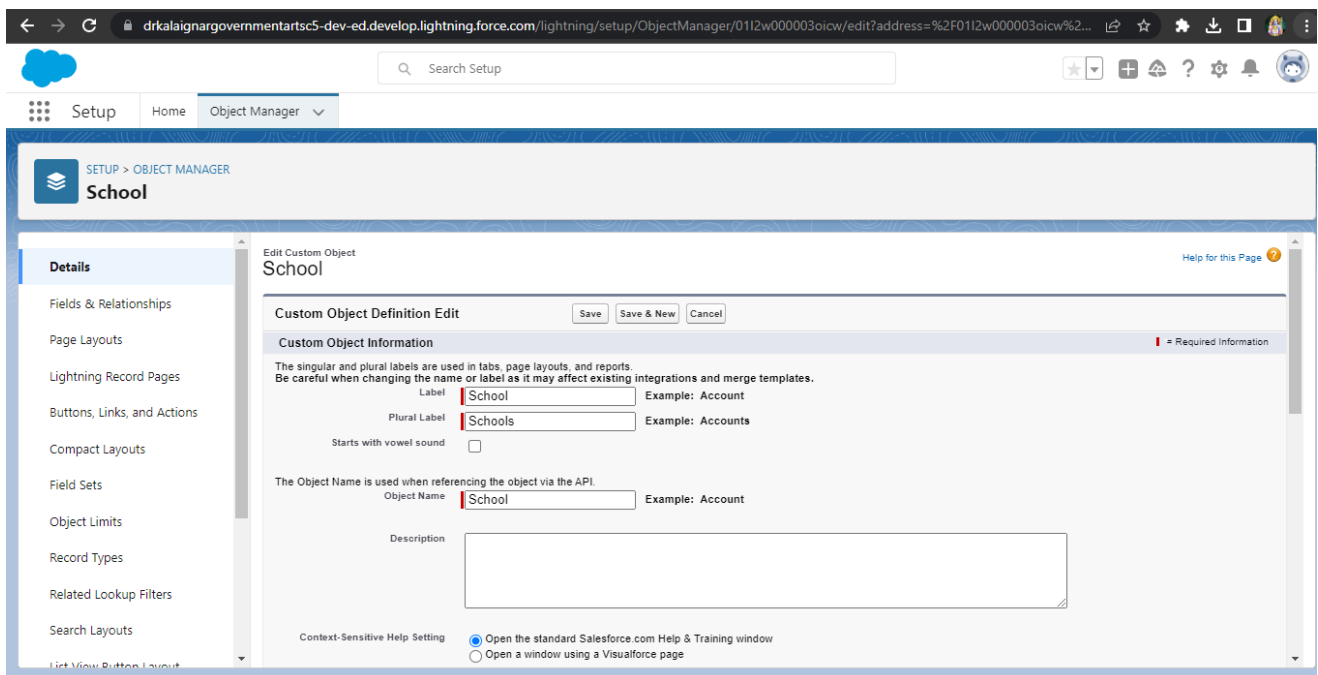


## Milestone – 2: Object

### Activity – 1: Creation of School Object

For this school management we need to create 3 objects i.e. school, parents and students. The below steps will assist you in creating those objects.

This picture belongs to School object.



The screenshot shows the Salesforce Setup interface for creating a custom object. The browser address bar displays the URL: `drkalaingovernmentartsc5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oicw/edit?address=%2F0112w000003oicw%2F...`. The page title is "School" under the "SETUP > OBJECT MANAGER" section. A left sidebar lists various setup 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 "Edit Custom Object School" and contains the "Custom Object Definition Edit" form. This form includes fields for "Label" (School), "Plural Label" (Schools), "Object Name" (School), and a "Description" text area. It also features a "Starts with vowel sound" checkbox and a "Context-Sensitive Help Setting" section with two radio button options: "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page". A "Help for this Page" link is visible in the top right corner of the form area.

drkalaingovernmentartsc5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oicw/edit?address=%2F0112w000003oicw%2F...

Search Setup

Setup Home Object Manager

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

Edit Custom Object  
School

Custom Object Definition Edit

Save Save & New Cancel

Custom Object 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 School Example: Account

Plural Label Schools Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name School Example: Account

Description

Context-Sensitive Help Setting

- ☒ Open the standard Salesforce.com Help & Training window
- ☐ Open a window using a Visualforce page

Help for this Page

## Activity 2: Create Student Object

This picture belongs to Students object.

The screenshot shows the Salesforce Setup interface for a custom object named 'Students'. The browser address bar indicates the URL: `drkalaingovernmentartsc5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oid6/edit?address=%2F0112w000003oid6%2F...`. The page title is 'Students' under the 'Object Manager' tab. The left sidebar contains a 'Details' section with a list of configuration options: 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 'Edit Custom Object Students' and contains a 'Custom Object Definition Edit' form. This form includes fields for 'Label' (Students), 'Plural Label' (Students), 'Object Name' (Students), and a 'Description' text area. It also has a 'Starts with vowel sound' checkbox and a 'Context-Sensitive Help Setting' section with two radio button options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. A red error message 'Required Information' is visible at the top right of the form area. The top navigation bar includes a search bar and various utility icons.

## Activity 3: Create Parent object

This picture belongs to School object.

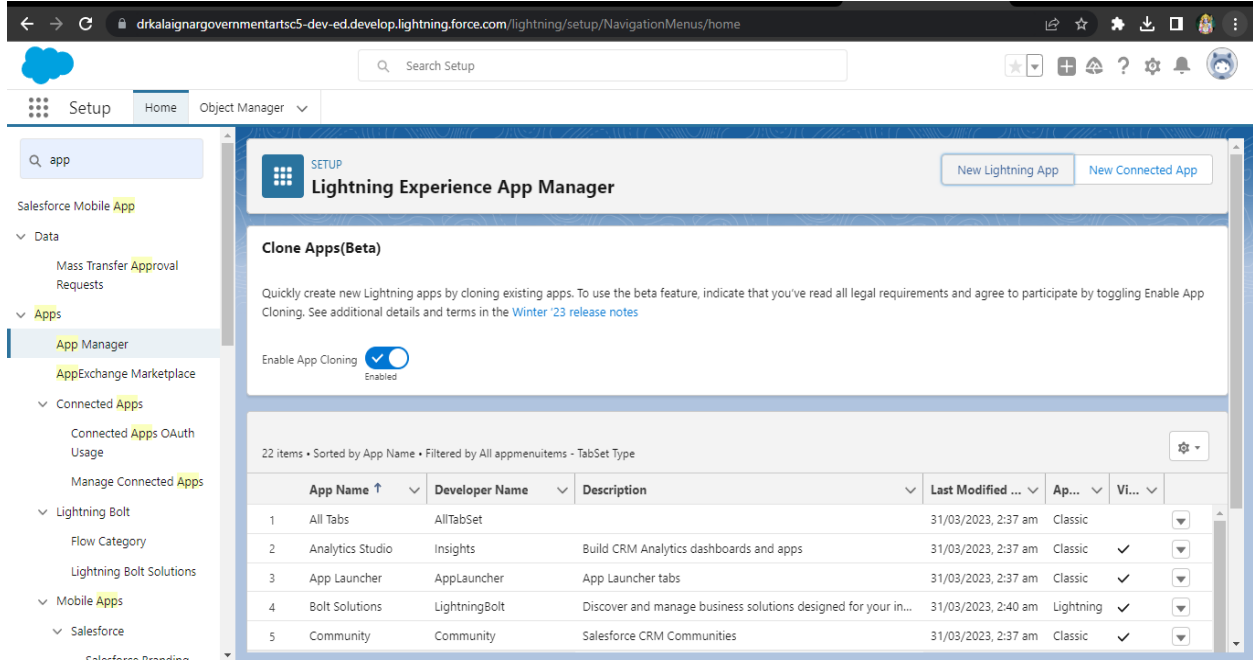
The top screenshot shows the Salesforce Lightning Setup interface for the 'Parent' Custom Object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Custom Object Parent' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which includes fields for 'Label' (Parent), 'Plural Label' (Parents), 'Starts with vowel sound' (checkbox), 'Object Name' (Parent), and 'Description'. It also provides examples for 'Account' and 'Accounts'. At the bottom, there are radio buttons for 'Context-Sensitive Help Setting': 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.

The bottom screenshot shows the 'Custom Tabs' page in the Salesforce Lightning Setup interface. The left sidebar has a search bar with 'tab' entered and a 'User Interface' section with options: 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' (selected). The main content area is titled 'Custom Tabs' and includes a 'Custom Object Tabs' section with a table of tabs. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. It lists three tabs: 'Parents' (People style), 'Schools' (Books style), and 'Students' (Big top style). Below this is a 'Web Tabs' section with a 'No Web Tabs have been defined' message, and a 'Visualforce Tabs' section.

## Milestone -3: 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.

### Activity:



The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and App Manager. The main content area is titled "Lightning Experience App Manager" and includes a "Clone Apps(Beta)" section with a toggle for "Enable App Cloning" set to "Enabled". Below this is a table listing 22 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility.

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		31/03/2023, 2:37 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	31/03/2023, 2:37 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	31/03/2023, 2:37 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	31/03/2023, 2:40 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	31/03/2023, 2:37 am	Classic	✓

## Create the School Management app

The screenshot shows the 'New Lightning App' setup interface in a web browser. The page title is 'New Lightning App' and the sub-header is 'App Details & Branding'. Below the sub-header, there is a text prompt: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The interface is divided into two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, there are three input fields: 'App Name' (containing 'School Management'), 'Developer Name' (containing 'School\_Management'), and 'Description' (with a placeholder 'Enter a description...'). In the 'App Branding' section, there is an 'Image' upload area with an 'Upload' button, and a 'Primary Color Hex Value' field (containing '#0070D2'). At the bottom of the modal, there is a progress bar and a 'Next' button.

drkcalaignargovernmentartsc5-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

### New Lightning App

#### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

\*App Name ⓘ  
School Management

\*Developer Name ⓘ  
School\_Management

Description ⓘ  
Enter a description...

**App Branding**

Image ⓘ  
Upload

Primary Color Hex Value ⓘ  
#0070D2

Org Theme Options

Next

The screenshot shows the 'New Lightning App' setup interface in a web browser, specifically the 'Navigation Items' step. The page title is 'New Lightning App' and the sub-header is 'Navigation Items'. Below the sub-header, there is a text prompt: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' The interface is divided into two main sections: 'Available Items' and 'Selected Items'. In the 'Available Items' section, there is a search bar with the text 'dash' and a 'Create' button. In the 'Selected Items' section, there is a list of items: 'Schools', 'students', 'parents', 'Reports', and 'Dashboards'. At the bottom of the modal, there is a progress bar and 'Back' and 'Next' buttons.

drkcalaignargovernmentartsc64-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

### New Lightning App

#### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**

dash

**Selected Items**

- Schools
- students
- parents
- Reports
- Dashboards

Back

Next

## Milestone -4: Fields and Relationship

### Activity – 1:

This is belongs to Fields & Relationship for School objects.

The screenshot shows the Salesforce Lightning Setup interface for the 'School' object. The left sidebar contains a navigation menu with 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 'Fields & Relationships' and shows a table of 9 fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: 9629660409 (Phone), Address (Text Area(255)), Created By (Lookup(User)), District (Text Area(255)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), school (Text Area(255)), and School Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
9629660409	X9629660409__c	Phone		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
school	school__c	Text Area(255)		
School Name	Name	Text(80)		✓

### Activity – 2:

This is belongs to Fields & Relationship for Students objects.

The screenshot shows the Salesforce Lightning Setup interface for the 'Students' object. The left sidebar contains a navigation menu with 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 'Fields & Relationships' and shows a table of 8 fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: 9629660409 (Phone), Class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Marks (Number(18, 0)), Results (Picklist), School (Master-Detail(School)), and Student Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
9629660409	X9629660409__c	Phone		
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

## Activity – 3:

This is belongs to Fields & Relationship for the Parents objects.

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Last Modified By, Owner, Parent Address, Parent Name, and Parent Number.

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

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Profiles' table is displayed, showing a list of profiles with columns for Action, Profile Name, User License, and Custom. The profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, and Custom Sales Profile.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Security User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>

## Creation on Profile:

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Clone Profile' page is active, prompting the user to 'Enter the name of the new profile.' A message states: 'You must select an existing profile to clone from.' Below this, a table lists existing profiles:

Existing Profile	User License	Profile Name
Standard User	Salesforce	School Profile

Buttons for 'Save' and 'Cancel' are at the bottom of the table. The left sidebar shows the navigation menu with 'Profiles' selected under 'ADMINISTRATION'.

## Milestone - 6: Users

The screenshot shows the Salesforce Setup interface for the 'Users' section. The 'All Users' page is active, displaying a list of users. The page 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:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d5i00000bz68lead.92qozrk97a2h@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	parents	pare	parents@lmm@gmail.com		✓	School profile
<input type="checkbox"/> Edit	principals	prin	principals@lmm@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	teacher	teac	teacher@lmm@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5i00000bz68lead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	integration@00d5i00000bz68lead.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	V.IVERN	LV	lmm1234@gmail.com		✓	System Administrator

The bottom of the screen shows the Windows taskbar with the date and time as 1:14 PM on 12-Apr-23.



## Creating a User's:

The screenshot displays the Salesforce Lightning Setup interface for user management. The left sidebar contains the navigation menu, with 'User Management Settings' and 'Users' highlighted. The main content area shows the 'New User' form, which is divided into two sections: 'User Edit' and 'General Information'. The 'General Information' section is active, and it contains a form with various fields for user creation. The 'Role' dropdown is set to '<None Specified>', and the 'License' dropdown is set to 'Force.com - Free'. The 'Profile' dropdown is set to 'Force.com - Free User'. The 'Active' checkbox is checked, and the 'Marketing User' checkbox is also checked. The 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User' checkboxes are unchecked. The 'Data.com User Type' dropdown is set to 'None'. The 'First Name' field is empty, and the 'Last Name' field is empty. The 'Alias' field is empty, and the 'Email' field is empty. The 'Username' field is empty, and the 'Nickname' field is empty. The 'Title' field is empty, and the 'Company' field is empty. The 'Department' field is empty, and the 'Division' field is empty.

## Milestone - 7: Permission Sets

### Activity – 1:

### Permission Sets 1:

This screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays a table of all permission sets. The table has columns for Action, Permission Set Label, Description, and License. The table lists several permission sets, including Buyer, Buyer Manager, CRM User, Commerce Admin, Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Experience Profile Manager, and Facility Manager. The bottom of the page shows a taskbar with various application icons and system information.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/> Del   Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloca...	Facility Manager

This screenshot shows the Salesforce Setup page for creating a new 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, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, and Queues. The main content area displays the 'Create' form for a Permission Set. The form has sections for 'Enter permission set information' and 'Select the type of users who will use this permission set'. The 'Enter permission set information' section includes fields for Label, API Name, and Description. The 'Select the type of users who will use this permission set' section includes a dropdown for License and a link to 'Learn more here'.

Enter permission set information

Label:

API Name:

Description:

Session Activation Required: ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose "-None-" if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License:

drkialaignovernmentarts64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Search Setup

Setup Home Object Manager

permi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

### SETUP Permission Sets

Save Cancel

Enter permission set information

Label teacher permission

API Name teacher\_permission

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License --None--

Save Cancel

36°C Mostly sunny 3:05 PM 11-Apr-23

drkialaignovernmentarts64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OP55i000004xlBX/PermissionSetAssignment/home

Search Setup

Setup Home Object Manager

permi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

### ... > SETUP > PERMISSION SET 'TEACHER PERMISSION' teacher permission

Current Assignments

Add Assignment

No assignments defined.

36°C Mostly sunny 3:07 PM 11-Apr-23

## Activity – 2:

### Permission Sets 2:

The screenshot shows the Salesforce Setup interface for creating a new Permission Set. The left sidebar contains navigation links: 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 (selected), Profiles, Public Groups, and Queues. The main content area is titled "Permission Sets" and "Create". It includes a "Save" button and a "Cancel" button. The "Enter permission set information" section has fields for Label, API Name, and Description, with a "Session Activation Required" checkbox. Below this is the "Select the type of users who will use this permission set" section, which includes instructions and a "License" dropdown menu.

The screenshot shows the Salesforce Setup interface for assigning users to a Permission Set. The left sidebar contains navigation links: 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 (selected), Profiles, Public Groups, and Queues. The main content area is titled "teacher permission" and "Select Users to Assign". It includes a "Recently Viewed" section with a search bar and a table of users. The table has columns for Full Name, Title, Phone, and Email. Two users are listed: principals and LIVEEN V.

	Full Name	Title	Phone	Email
<input checked="" type="checkbox"/>	principals			principalslmm@gmail.com
<input checked="" type="checkbox"/>	LIVEEN V			liveen1301@gmail.com

Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

## **Milestone - 8: Reports**

### **Activity:**

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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'repo' and a list of settings categories: Feature Settings, Analytics, Reports & Dashboards (selected), Access Policies, Historical Trending, Report Types, Reporting Snapshots, and Reports and Dashboards Settings. The main content area is titled 'Reports and Dashboards Settings' and 'Report and Dashboard User Interface Settings'. It includes a search bar, a 'Help for this Page' link, and several sections of settings: 'User Interface' (with checkboxes for 'Enable Floating Report Headers', 'Enable Dashboard Finder', 'Hide the option to export a report in XLS format', and 'Enable Inline Editing in Reports'), 'Confidential Information Disclaimer Settings' (with checkboxes for 'Exclude Disclaimer from Formatted Report Exports' and 'Exclude Disclaimer from Report Run Pages'), 'Chatter Options' (with a checkbox for 'Enable Dashboard Component Snapshots'), and 'Unified Analytics Home' (with checkboxes for 'Show preview thumbnails for reports and lightning dashboards' and 'Enable the Unified Experience for Analytics Home'). The URL bar at the bottom shows 'https://drkaignargovernmentartsc5-dev-ed.develop.lightning.force.com/one/one.app#/setup/ReportUI/home'.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The main content area is titled 'Reports' and 'Recent' with 3 items. A search bar for recent reports is present. Below the search bar is a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists three reports: 'New parents Report', 'New students Report', and 'New Schools Report', all created by 'LIVEEN V' on 11/4/2023. A left sidebar contains filters for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The bottom of the image shows a Windows taskbar with the search bar, task icons, and system tray information (32°C, Partly cloudy, 7:33 PM, 11-Apr-23).

Report Name	Description	Folder	Created By	Created On	Subscribed
New parents Report		Private Reports	LIVEEN V	11/4/2023, 7:30 pm	
New students Report		Private Reports	LIVEEN V	11/4/2023, 7:29 pm	
New Schools Report		Private Reports	LIVEEN V	11/4/2023, 7:24 pm	

## **Trailhead Profile Public URL**

- Team leader - <https://trailblazer.me/id/f5e216c556545c5a6914af9d99439025>
- Team member 1 - <https://trailblazer.me/id/a02c2c40ab1bcadb946e4aed830ab1edf>
- Team member 2 - <https://trailblazer.me/id/m18fe72704e51ee3b1e74de2fd8084392>
- Team member 3 - <https://trailblazer.me/id/f08b5ad605a5b81a2ca44aec519e762f>

## **ADVANTAGES & DISADVANTAGES**

Remember how businesses used to store customer information? In telephone books, Excel tables, diaries, card files. It was uncomfortable. All these carriers could be lost at a moment, and it was quite difficult to organize information in them or find it quickly. It was possible to restore the entire history of relationships with the client only from memory or by collecting all the records together.

Almost the same approach was used in education. The methodologists manually drew up timetables, all information about the students was stored in journals, and the educational process itself could not be imagined without a physical presence in the classroom. Fortunately, those days are over.

For everything to run like clockwork and to run quickly, it is necessary that information about each student and teacher be entered into a common database. In this case, the search for it should be fast, and the updating of information should be simple. All work tasks and timetables should also be kept in a convenient form and be easily available and modifiable at any time. All these functions and many others are implemented in modern CRM for the education industry.

CRM for higher educational institutions are customer relationship management systems. They include other functions for optimizing business

processes - you can find everything you need. It all depends on the needs of the company.

CRM usage in higher education has a wide range of powerful benefits. All processes, both educational and any others, must be recorded in a single information space, otherwise chaos cannot be avoided. Importance of CRM systems in higher education lies in:

- Customer accounting and complete information about the relationship with them;
- Marketing tools;
- Schedule of classes and information on the educational process, by student;
- Personal accounts of students and teachers with the ability to upload homework and receive feedback;
- Ability to create tasks, business processes and schedule work.

This is not a complete list of features that prove efficiency of CRM in managing students. There may be other functions, including non-standard ones, for the implementation of which developers can be involved.

The development of the online learning business is going fast these days and the competition for the consumer has become very intense. Many companies are no longer able to reduce their rates to attract customers - all that remains is to compete on the basis of quality indicators, including improved customer service and improved service levels. And this is just the area of CRM.

The CRM approach has a great future and advantages of CRM for educational organizations are undeniable. Advertising was once considered the engine of commerce. Today it is not enough to create an original course, it must be



customized, adapted to the needs of a particular individual. CRM allows you to close the entire cycle by "correct" work with the client. A company that has mastered CRM technology will be able to outstrip its competitors.

## **APPLICATION**

- Customer relationship management (CRM) is **a set of integrated, data-driven software solutions that help manage, track, and store information related to your company's current and potential customers.**
- CRM can analyze data and generate reports whenever required. There are mainly three types of CRM.

**Applications-operational, Analytical and Collaborative** to perform all these activities.

- Tracking customer's.
- A good CMR helps you understand your market and the needs of your customers As you
- Attract more customers.
- Collecting data for marketing.
- A CRM saves important data in extensive customers and contact lists. This makes to easy and efficient to market directly to them based on particular criteria.

## **CONCLUSION**

- It would probably be particularly difficult to develop and install customer centric strategies.
- IF CMR used must be with the backing of those at the highest level and it must be planned carefully.
- A process must be gone through which would take note of CMR theory and use the experience of others to maximize the chances of success.

### **FUTURE SCOPE:**

Although the model features customers at the heart, not all companies would agree. Reached Brandon and Bill Marriott have both claimed that their most important constituency is the internal customer, the employee. They both believe that if the employee is satisfied in her work they will give excellent service to their external customers - airline passengers and hotel guests respectively. Clearly the role of employee is that much more important in business where customer satisfaction is derived principally from the moment s of truth, in interaction with employees.

Sears, the US retail giant, has recently developed a management model which has calibrated the relationship between employee satisfaction, customer satisfaction and business performance. They estimate that a 5 unit increase in employee satisfaction provides a 1.3 unit increase in customer satisfaction which drives up revenue by 0.5%.

There are also other circumstances under which the external customer may not be the most important constituency. For examples, a company entering a new market may focus initially on building close relationships with distribution partner who can take on sales, logistics and customer service roles

Similarly, following acquisition there is based on mutual understanding with the new owners.