

# A CRM APPLICATION FOR SCHOOL AND COLLEGE

## INTRODUCTION

### 1.1 Overview

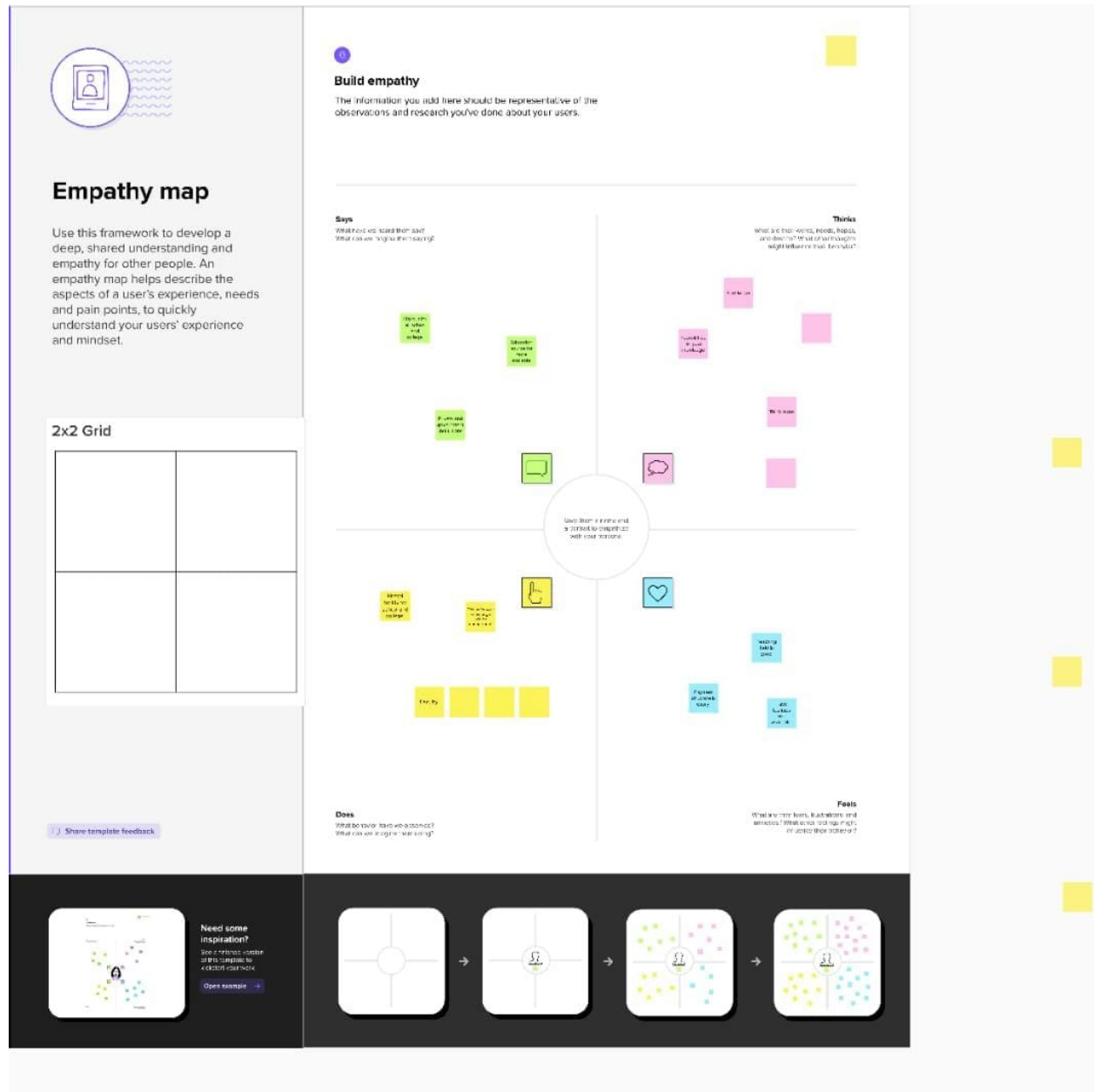
The project aim is collect data for school students and college students and School management details with CRM application and the salesforce makes this process simple and effective

### 1.2 Purpose

Schools and colleges automate admission processes and manage communication with students and parents

## Problem Definition & Design Thinking

### 2.1 Empathy Map



2.2 Ideation & Brainstorming map screenshot

2

## Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

### TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

#### Person 1

Class Schedule management	Education Plan Registration	Student Records management
Admission and fees		

#### Person 2

Improve Teacher Salary	Control the OTM	Teacher Scheduling
Standardizing grading		

#### Person 3

Group of the class course	Parents and teachers	Higher school diploma
Non attendance plan sheet		

#### Person 4


#### Person 5

Standard test	Mathematics Test	Online subject site completed
Sports activity program online content		

#### Person 6


#### Person 7


#### Person 8

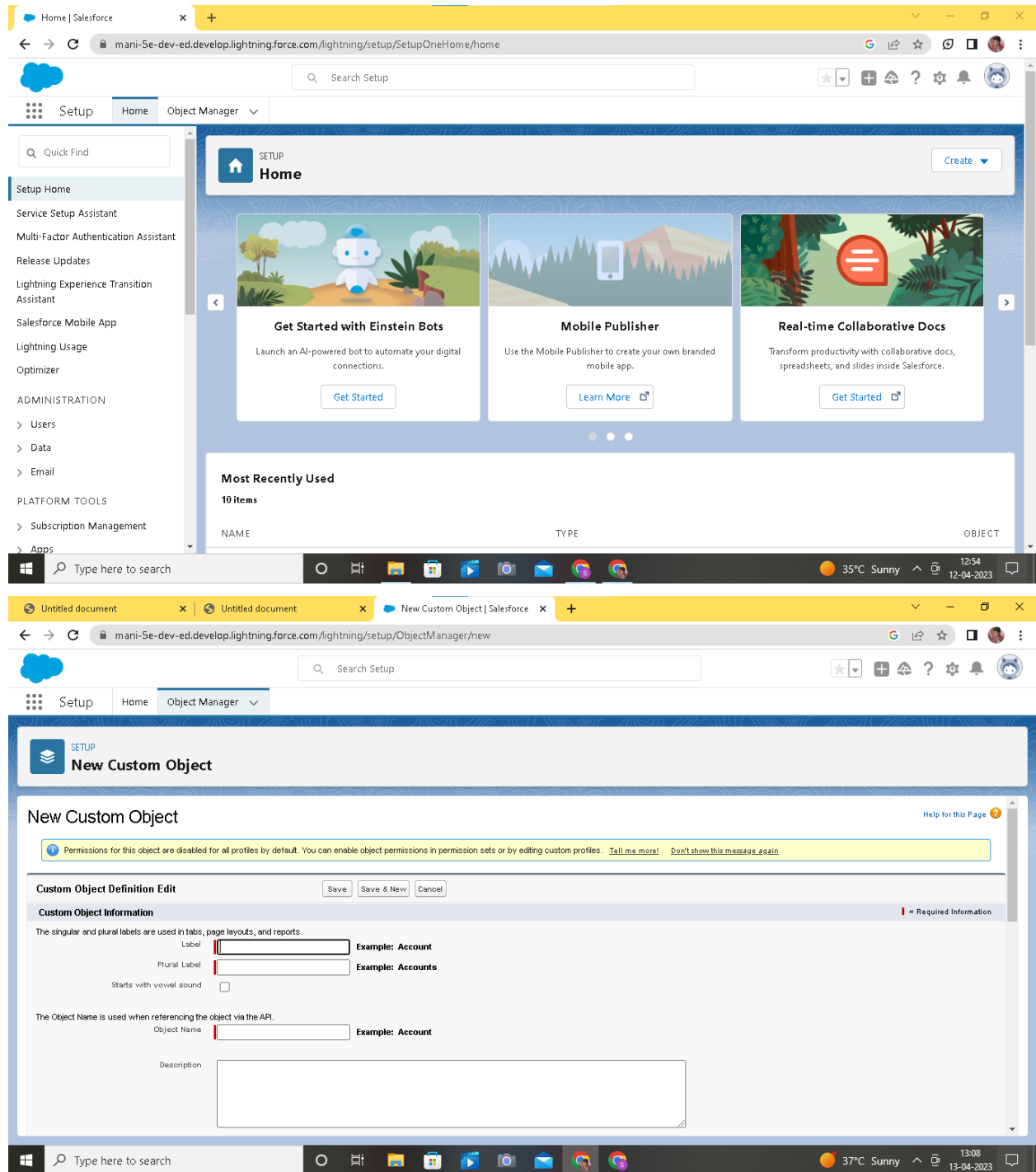

## RESULT

### 3.1 Data Model:

Object name	Fields in the Object	
Obj 1		
	Field label	Data type
	Label	School
	Plural Label	Schools

Obj 2		
	Field label	Data type
	Label	Parent
	Plural Label	Parents
Obj 3		
	Field label	Data type
	Label	student
	Plural Label	students

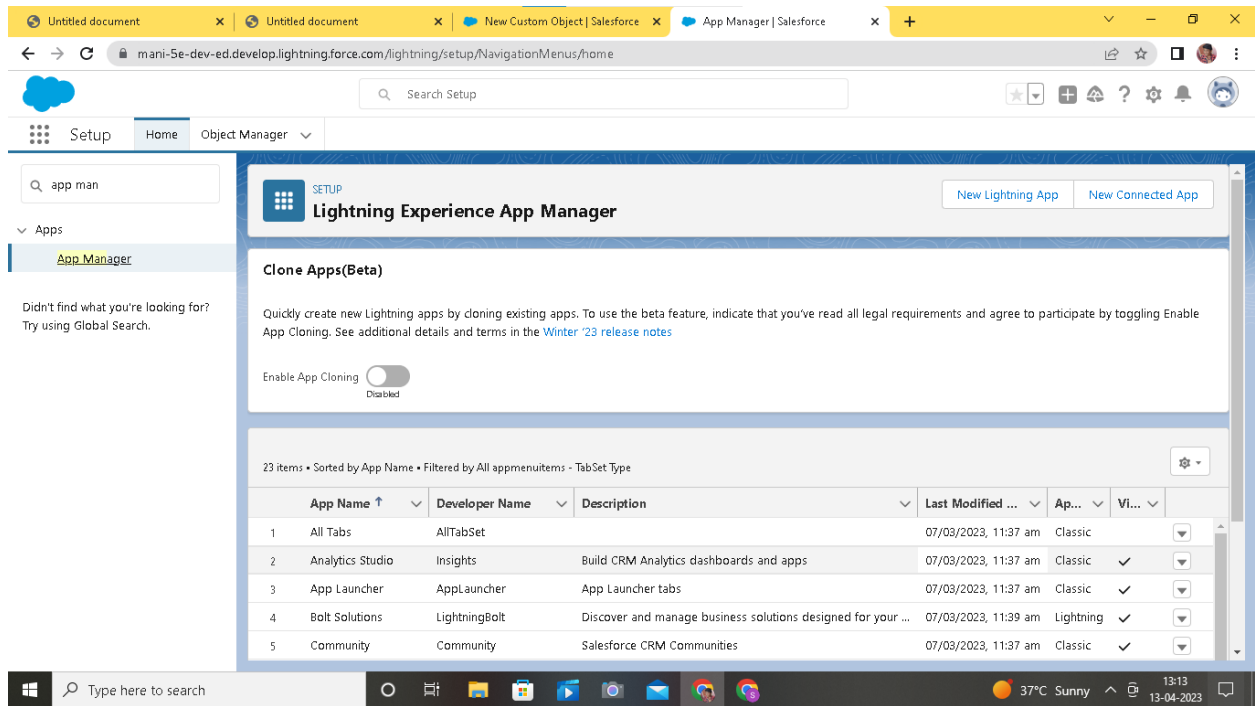
3.2 Activity & screenshot



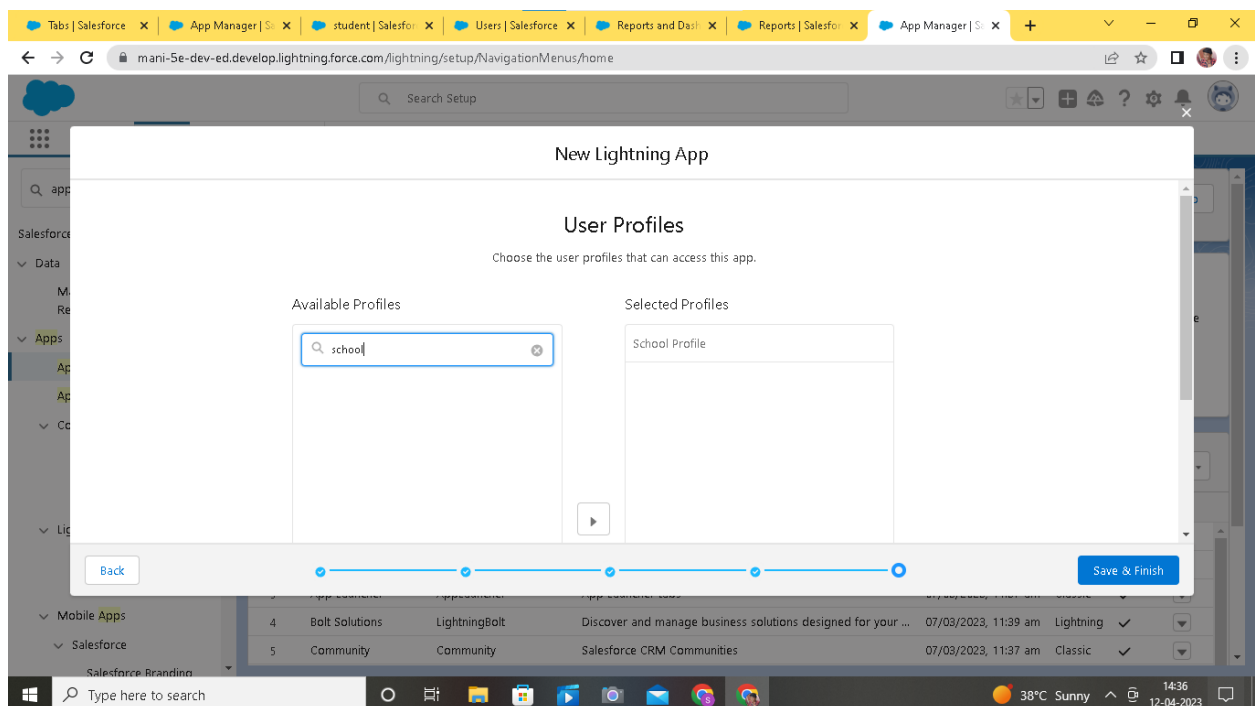
Description; we go to the object manager and create a new custom objects

Milestone–3

Lightning app ;



Description ;we go to set up and search app manager and create new lightning app



Description; we go to the set up page and click appmanager and select new lightning app and apply details on the box and move files then click save and new

Milestone—4

## Fields and relationship

The screenshot shows the Salesforce Object Manager interface for the 'student' 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 list of 7 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Number(18, 0)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Phone number	Phone_number_c	Phone		
Results	Results_c	Picklist		
School managment	School_managment_c	Master-Detail(School managment)		✓
student Name	Name	Text(80)		✓

Description ; we go to the object manager and select Fields & Relationship for students

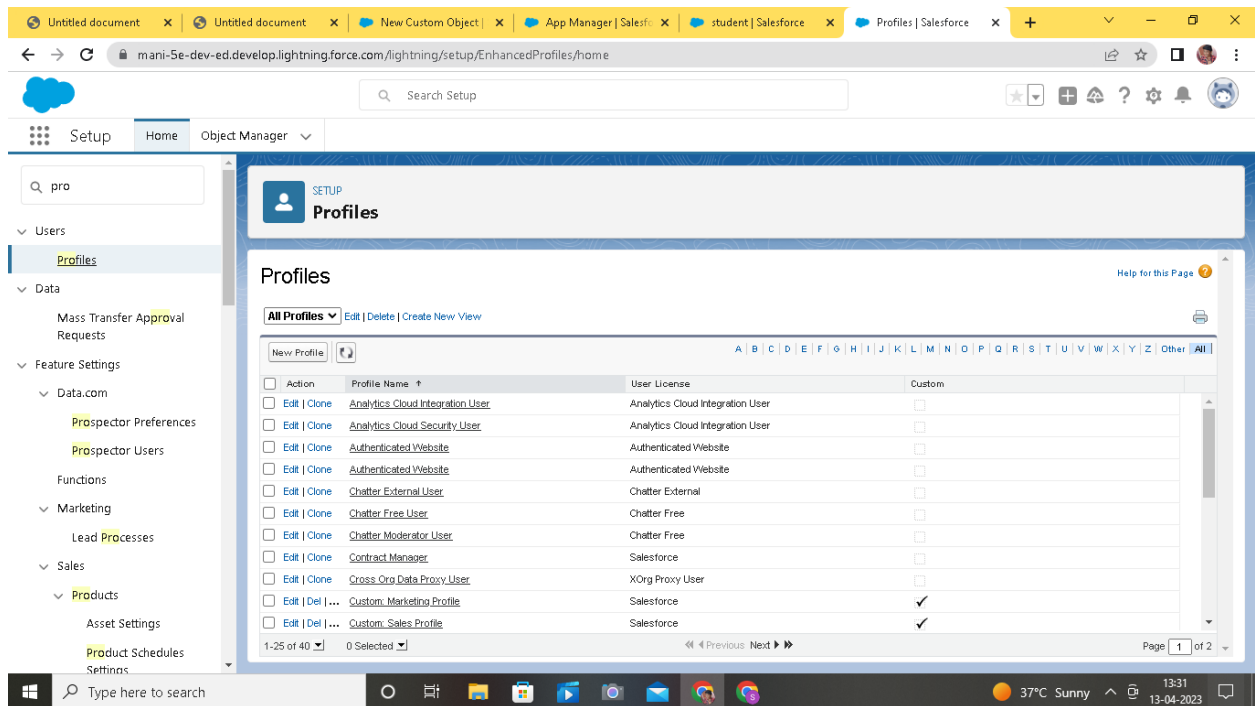
The screenshot shows the 'New Custom Field' wizard in the Salesforce Object Manager. The left sidebar is the same as the previous screenshot. The main content area is titled 'New Custom Field' and shows 'Step 1. Choose the field type'. The wizard prompts the user to 'Specify the type of information that the custom field will contain.' and provides a list of data types to choose from:

- ☒ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☐ Lookup Relationship
- ☐ Master-Detail Relationship

Description ;we go to the home page and click at the set up and the page will be open quick find box and type the profiles to open in the box

## Milestone–5

Profile ;



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Users, Profiles, Data, Feature Settings, Data.com, Functions, Marketing, Sales, and Products. The main content area is titled 'Profiles' and displays a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Custom' column has checkboxes for each profile. The 'Custom Sales Profile' is selected, and the 'Custom Marketing Profile' is also checked. The bottom of the screen shows a Windows taskbar with the date and time as 13:31 on 13-04-2023.

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 Integration 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"/>

Description; set up and search profiles and must apply details and create profiles

## Milestone–6

Users;



**Users**

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	A. Manikandan	MA	mani@company.com		✓	System Administrator
<a href="#">Edit</a>	arivazhagan manikandan	mani	a76639768@gmail.com		✓	Standard User
<a href="#">Edit</a>	Chatter Expert	Chatter	chattv00d2w00000rko8ean.0u4112nd8kk@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	User Integration	integ	integration@00d2w00000rko8ean.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rko8ean.com		✓	Analytics Cloud Security User

Description ;from home page and search users and create

Milestone-7

Permission sets ;

**Permission Sets**

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

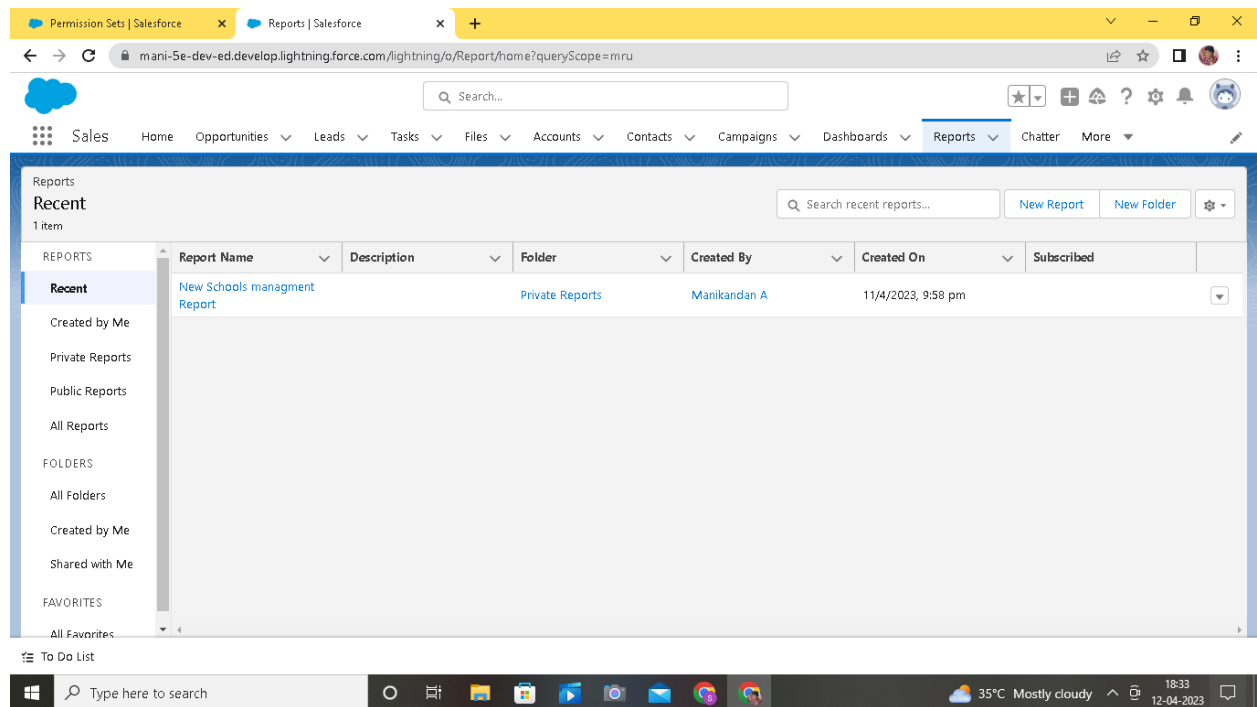
**teacher permission** | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<a href="#">Clone</a>	Buyer	Allows access to the store. Lets users see products and cat...	B2B Buyer Permission Set One Seat
<a href="#">Clone</a>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage ...	B2B Buyer Manager Permission Set One Seat
<a href="#">Clone</a>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<a href="#">Clone</a>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<a href="#">Clone</a>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazo...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Agent	Access agent features in Service Cloud Voice contact center...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contac...	Service Cloud Voice User
<a href="#">Del</a>   <a href="#">Clone</a>	Experience Profile Manager		Salesforce

Description; from home page search permission sets and create

Milestone-8

Reports ;



Description; we go to reports and create new school management ports

Trailhead profile public URL

Team lead-<https://trailblazer.me/id/mania64>

Team member1-<https://trailblazer.me/id/rkumar5006>

Team member2-<http://trailblazer.me/id/mmuthuraj3>

Team member3-<https://trailblazer.me/id/nnaveen85>

### Project Report Template

### ADVANTAGES & DISADVANTAGE

Advantage;

1. Increased Revenue and Decrease overhead .

2. Improved customer satisfaction .

Disadvantage ;

1. Many people use the app in same time it was run slow.

APPLICATION ;

CRM software lets you store customer and prospects informations ,identity ,salesforce ,record service issues and manage campaign the limits

CONCLUSION ;

Application for the school, the entire colleges and below the entire task will be the one of the parents will the application below .

FEATURES SCOPE ;

Modify the schools will the applications to the parents of rolls .