

Creation of an Application for school Management

1 INTRODUCTION

1.1 OVERVIEW

PROJECT NAME: CRM APPLICATION FOR SCHOOL MANAGEMENT

- My project is about the maintenance and management of school related problems which further can be modified based on the requirements.
- Our team aim is to provide real time knowledge for all 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 sales force.
- With the help of this project they will gain knowledge and can include it into their resume as well.
- Through my project assumption, create new technology in school admissions.
- To lead school maintenance, sustainability, development and take into progress level should carry on in developed apps.
- Communicate parents and teachers about the student status in specific developer app.
- High enrollment of students in school admission, creating parent –teacher canvas software.
- Creating confidential atmosphere among students and parents developed by teachers respectively via CRM software.

1.2 PURPOSE

- In our project, school's developing possibilities should be focused and achieved.
- Admissions and payment status should have in an online process.
- For upcoming school events parents' ideas should be gathered.
- Continuous work flows and contact triggers should nurture our relation

2 PROBLEM DEFINITION AND DESIGN THINKING

2.1 Empathy MAP

An empathy map is a square divided into four quadrants with the user or client in the middle.

Each of the four quadrants comprises a category that helps us delve into the mind of the user.

The four empathy map quadrants look at what the user says, thinks, feels, and does.



2.2 Ideation and Brainstorming Map



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

- 🕒 10 minutes to prepare
- 🕒 1 hour to collaborate
- 👤 2-8 people recommended



Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕒 10 minutes

- A Team gathering**
Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.
- B Set the goal**
Think about the problem you'll be focusing on solving in the brainstorming session.
- C Learn how to use the facilitation tools**
Use the Facilitation Superpowers to run a happy and productive session.

Open article →

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

PROBLEM

How might we [your problem statement]?



Key rules of brainstorming

To run a smooth and productive session

- 🗣️ Stay in topic.
- 💡 Encourage wild ideas.
- 👂 Defer judgment.
- 👂 Listen to others.
- 🗣️ Go for volume.
- 👁️ If possible, be visual.

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

meetings in offline	communicating people through their language	lack of people interaction
Notice on people's behaviour		

Person 2

Distraction of people's thoughts	Lack of complements	Well defined description
Direct vision on people's command		

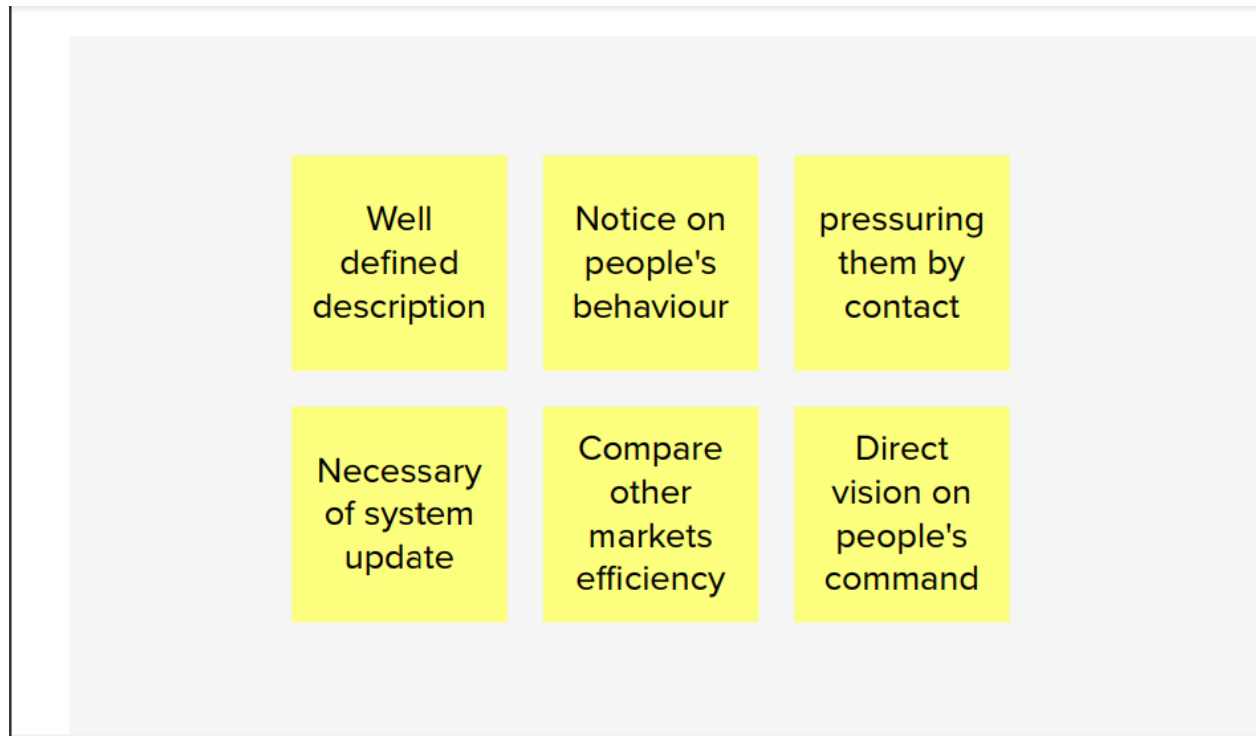
Person 3

Pressuring them by contact	A clear reference through canvas	Lack of fulfillment
Supports can ensured	Compare other markets efficiency	

Person 4

Improve the current strategy	Necessary of system updates	Lack of communication through and update
Developing confidential statement among customers	Less demand of the product	Low cost and good consume

GROUP IDEAS



Result

3.1 Data model:

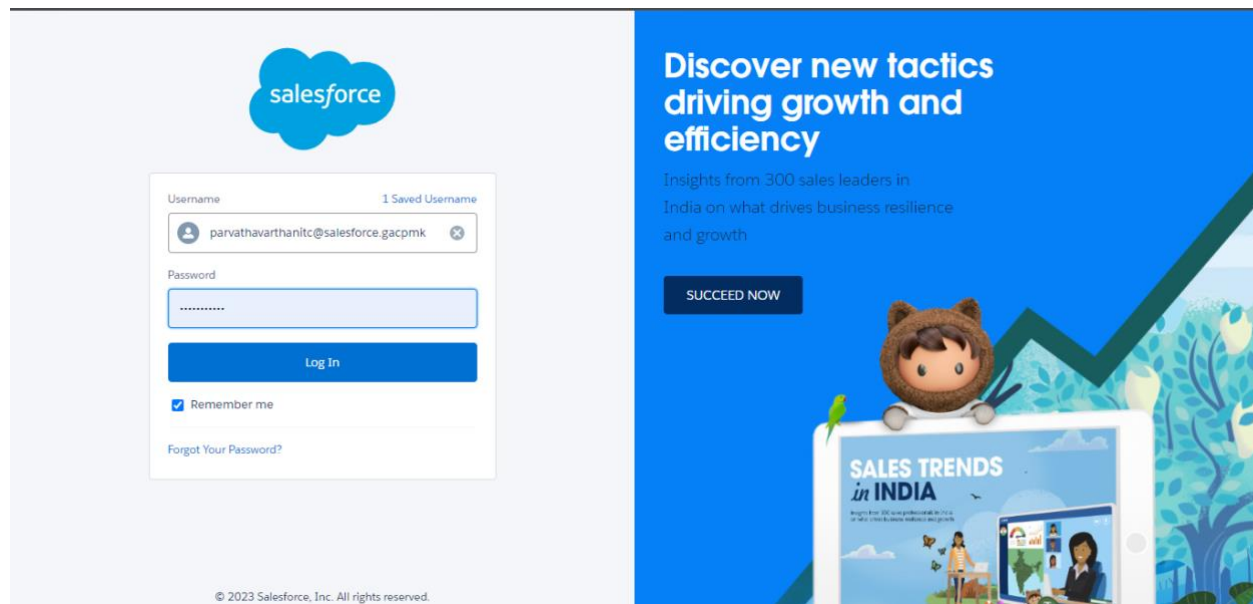
Object Name	Fields in the Object	
School	Data type	Field Label
	Text Area	<ul style="list-style-type: none"> Address District State School Website
Student		
	Data Type	Field Label
	Phone	Phone Number
	Master detail relationship	School
	Picklist	Results
	Number field	<ul style="list-style-type: none"> Class Mark

Parent	Data Type	Field Label
	Text area	Parent address
	Phone	Parent number

3.2. ACTIVITY AND SCREENSHOTS

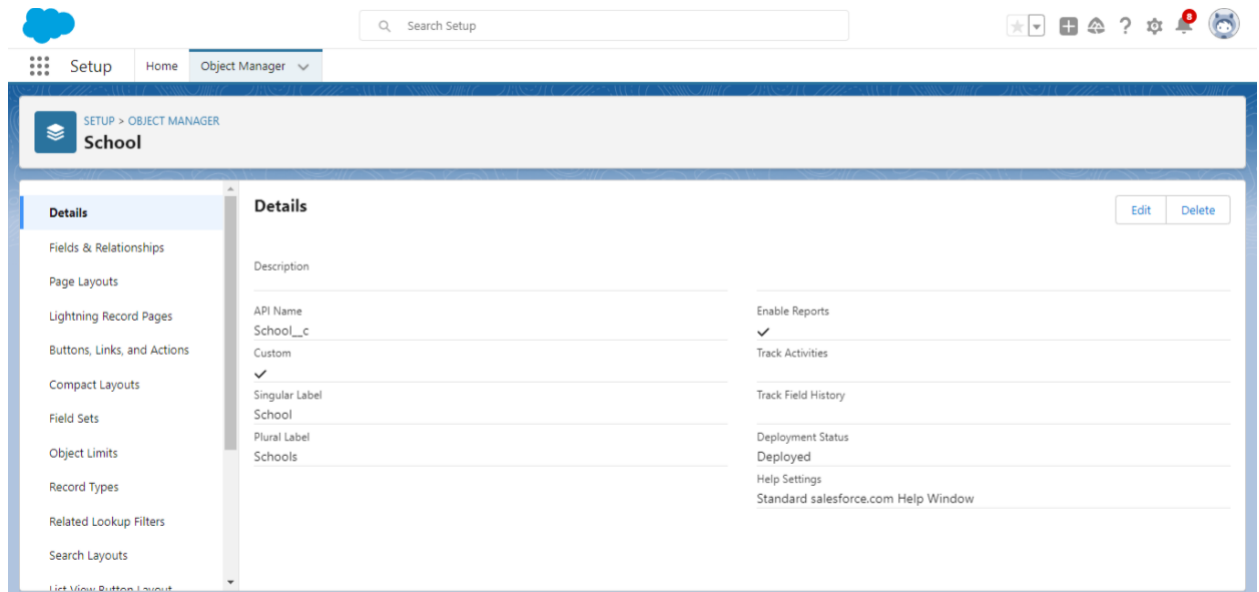
Milestone 1

Activity:Creating Developer Account

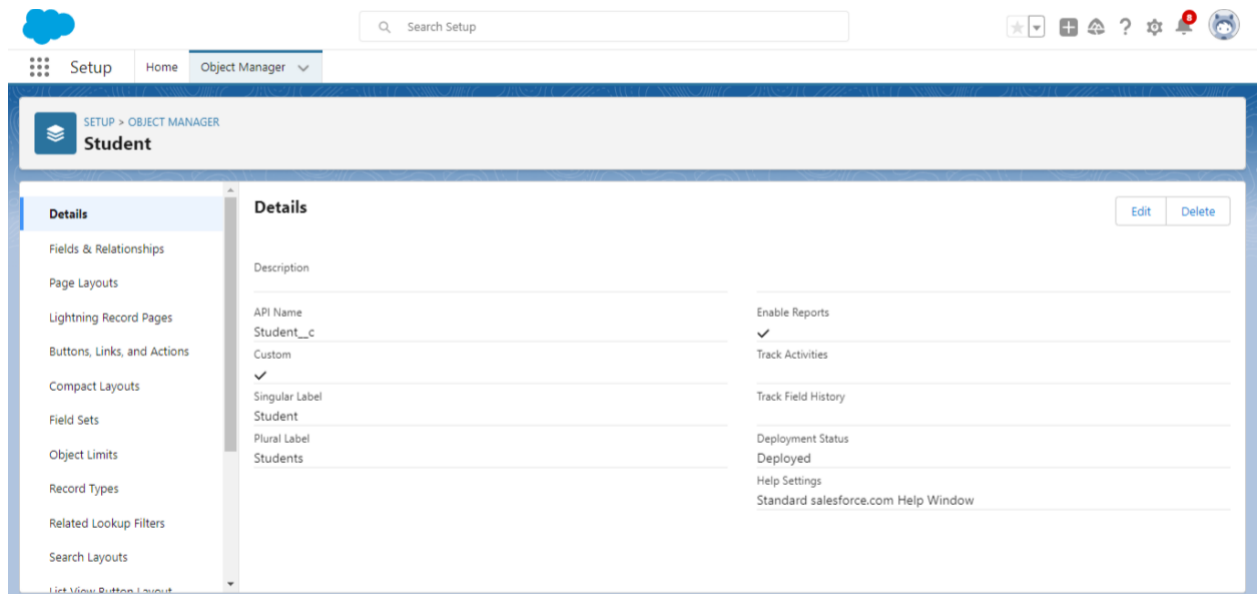


Milestone-2:Object

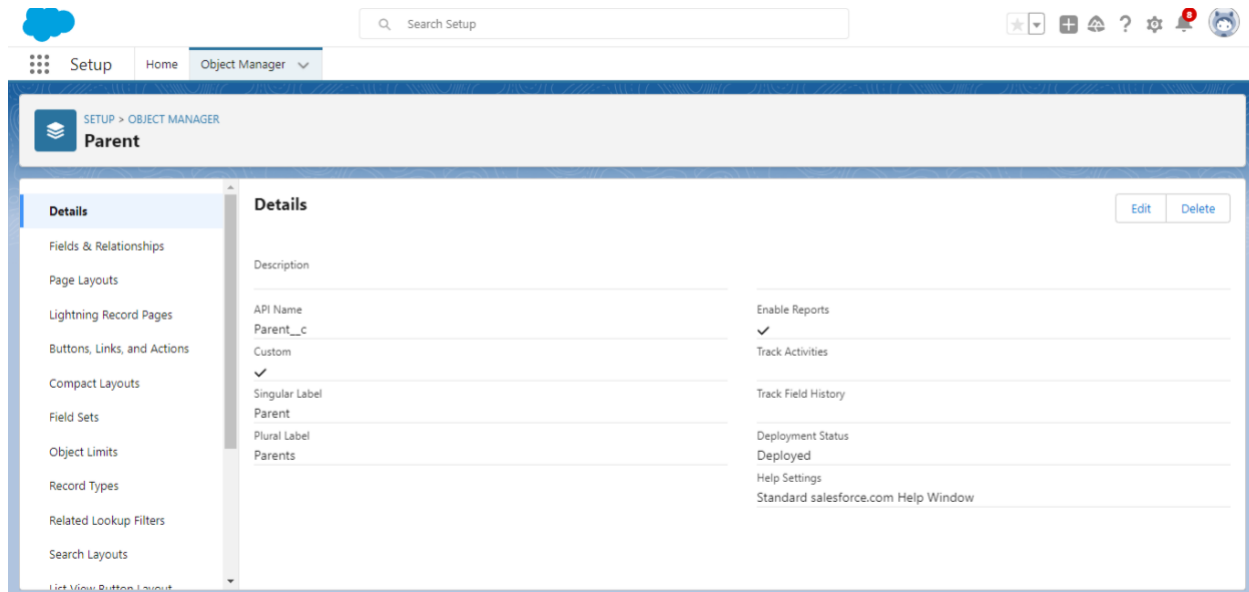
Activity-1: Creation of School Object



Activity 2: Create student object



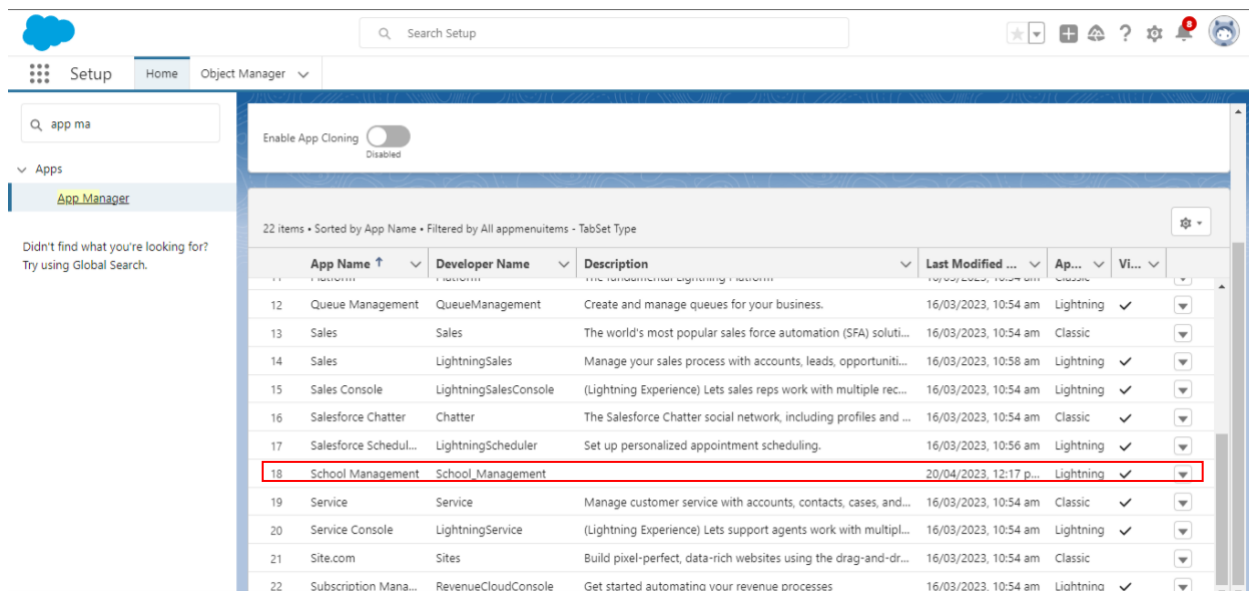
Activity 3: Create parent object



Milestone-3: Lightning App

Activity:

Create the School Management app



Milestone -4: Fields and Relationship

Activity-1:

Creation of fields for the School objects:

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
School

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT Student)		
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School Websites	School_Websites__c	Text Area(255)		
State	State__c	Text Area(255)		

Activity-2:

Creation of fields for the Student objects:

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
Class	Class__c	Number(18, 0)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Activity-3:

Creation of fields for the Parent objects:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' for the 'Parent' object, showing 6 items sorted by Field Label. The table lists fields with their names, data types, controlling fields, and indexed status.

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	Phone		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Milestone-5: Profile

Activity:

Creation on profile:

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar lists 'Users' and 'Profiles', with 'Profiles' selected. The main content area displays the 'Profiles' list, showing 7 profiles. The 'School profile' is highlighted with a red box, indicating it is the selected profile.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	School profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

Milestone-6: Users

Activity:

Creating a 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
Edit	Chatter_Expert	Chatter	chattv00d2v00000ria1keah.0kngdcncbgs0@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Parents_Parents	parents	napeshwari1207@gmail.com		<input type="checkbox"/>	School profile
Edit	Principal_Principal	prin	napeshwari08@gmail.com		<input checked="" type="checkbox"/>	School profile
Edit	T.C. carvathavarthani	TC	carvathavarthanic@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Teacher_Teachers	teac	napeshwari07@gmail.com		<input type="checkbox"/>	School profile
Edit	User_Integration	integ	integration@00d2v00000ria1keah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d2v00000ria1keah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Milestone-7:Permission sets

Activity-1:

Permission sets 1:

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](#)

[All Permission Sets](#) | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label ↑	Description	License
Del Clone	Principal permission		

1-1 of 1 | 0 Selected | [Previous](#) [Next](#) | Page 1 of 1

Activity-2:

Permission sets 2:

Setup Home Object Manager

Search Setup

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

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](#)

All Permission Sets Edit Delete Create New View

New

Action Permission Set Label Description License

Del Clone Teacher permission

1-1 of 1 0 Selected

Page 1 of 1

Milestone-8:Reports

Activity:

Reports :

School Management Schools Students Parents Reports Dashboards

Search...

Report: Accounts

School with students and parents

Enable Field Editing

Add Chart

Edit

Total Records

12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	parvathavarthani T C	GenePoint	CA	Customer - Channel	Cold	16/03/2023
2	-	parvathavarthani T C	United Oil & Gas, UK	UK	Customer - Direct	-	16/03/2023
3	-	parvathavarthani T C	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	16/03/2023
4	-	parvathavarthani T C	Edge Communications	TX	Customer - Direct	Hot	16/03/2023
5	-	parvathavarthani T C	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	16/03/2023
6	-	parvathavarthani T C	Pyramid Construction Inc.	-	Customer - Channel	-	16/03/2023
7	-	parvathavarthani T C	Dickenson plc	KS	Customer - Channel	-	16/03/2023
8	-	parvathavarthani T C	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/03/2023
9	-	parvathavarthani T C	Express Logistics and Transport	OR	Customer - Channel	Cold	16/03/2023
10	-	parvathavarthani T C	University of Arizona	AZ	Customer - Direct	Warm	16/03/2023
11	-	parvathavarthani T C	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/03/2023
12	-	parvathavarthani T C	sForce	CA	-	-	16/03/2023

4 Trailhead Public URL's

Team Lead:<https://trailblazer.me/id/rramanathan20>

Team Member 1:<https://trailblazer.me/id/nnageshwari1>

Team Member 2:<https://trailblazer.me/id/partc6>

Team Member 3:<https://trailblazer.me/id/rahir52>

5 ADVANTAGES & DISADVANTAGES

ADVANTAGES

- ❖ Simply increase the conversation rate using CRM
- ❖ The CRM and the mobile app are very easy and simple to use for any kind of user
- ❖ Without any kind of computer knowledge, it can be easily usable
- ❖ Enquires from various sources like GOOGLE Ads, API, landing pages will be added to the CRM directly including bulk uploads.
- ❖ Advanced Automation-Managing all kind of automation including lead customer in a simple manner.

DISADVANTAGES

- ❖ There is insecurity of data collected and stored
- ❖ Lack of commitment with the average level people
- ❖ Poor internet connection in some places
- ❖ It should reach only the educated parents
- ❖ Error can occurred while in the connectivity

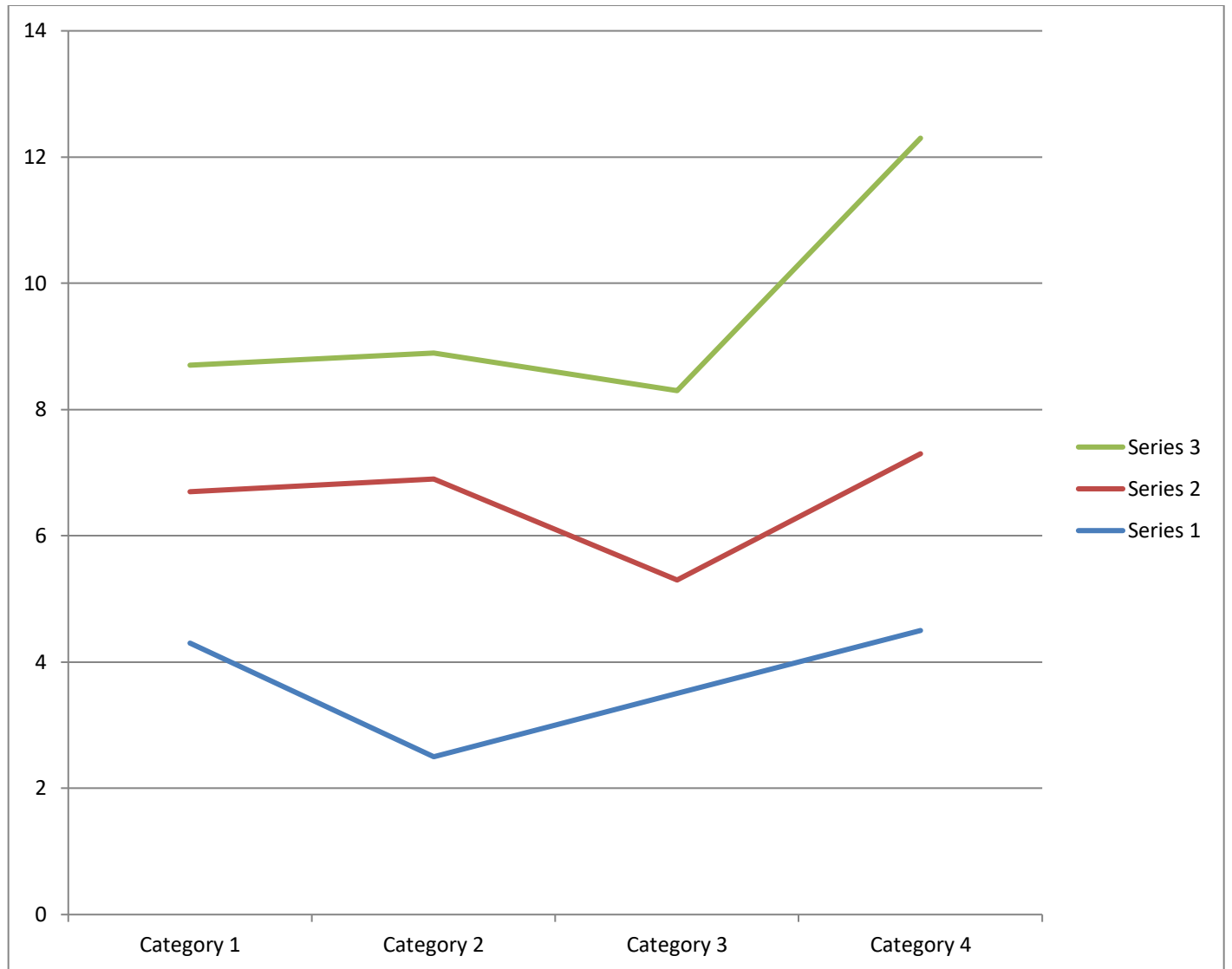
6 Applications

- ❖ In the application status
- ❖ In admission enrollment
- ❖ Collecting information from various sources
- ❖ Improving interactions among teachers and students
- ❖ Analyse the performance of various levels
- ❖ Manage custom interactions

7 CONCLUSION

- ❖ In this conclusion ,our project should be utilized and analysed by our team members for the further accessments
- ❖ Every school management should be developed by our implementable project
- ❖ So,it should create warm blooming enthusiastic customers in this field source

8 Future Scope



**CRM IN
SCHOOL
MANAGING**

**LARGE NUMBER
OF
ENROLLMENT**

**SATISFACTION
AMONG PARENTS**

**HAVING GREAT
VISION ON
CUSTOMER**

**INCREASED
ADMISSION RATE**

**PUBLIC MANAGING SKILL
SHOULD BE ATTAINED**