

A CRM Application for Schools and Colleges

Project Report Template

1. INTRODUCTION:

1.1 OVERVIEW:

- The main aim of this project is to manage customer relationships, integrate with other systems, and to build own applications.
- Salesforce is the customer success platform, designed to help sell, service, market, analyse, and connect with the customer.
- CRM stands for Customer “Relationship Management”.
- Customer Relationship Management helps to manage the relationships with the customers.

1.2 PURPOSE:

- This is my first project in my college life. And I am very thankful to get this change to work as leader in the project of “A CRM Application for Schools and Colleges.
- This project helps us to understand the customer relationships, makes us to create new app, learned about “Project Development Process”, “Design Thinking”.
- Mural helps us to create the empathy map and Ideation & Brainstorming map.

2. PROBLEM DEFINITION & DESIGN THINKING:

Problem Definition:

Finding problem statement by using Ideation & Idea Prioritization.

Design Thinking:

Design thinking involves five steps:

- Empathize
- Define
- Ideate
- Prototype
- Test

2.1 EMPATHY MAP:

An Empathy Map is a simple, easy-to-digest visual that captures knowledge about a user’s behaviour and attitudes. It is a useful tool to help teams better understand their users.

Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user’s perspective along with his or her goals and challenges.



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#)



Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

Says to ask the opinion of the experts

says if the product is comfy to keep in the room.

says if the product is suitable

says which brand we need to buy

The thought of wasting the time

The thought of, whether the product has warranty

The thought of wasting the money

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

The fear of buying a unbranded product

Makes to think, whether the product has the storage capacity to store our information and things.

After buying the product, we may feel, the product is good or bad in functioning.

while comparing with other's product, we may feel that our product is best.

Rushmiya, k

Searching the best product in google

Searching the rates and reviews of the people, who bought it already.

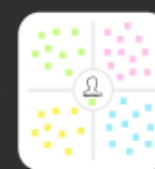
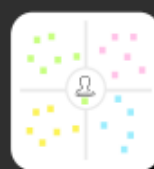
Searching the new model of the product which was launched recently.

We may feel, we need to buy a better product than the product which we brought.

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

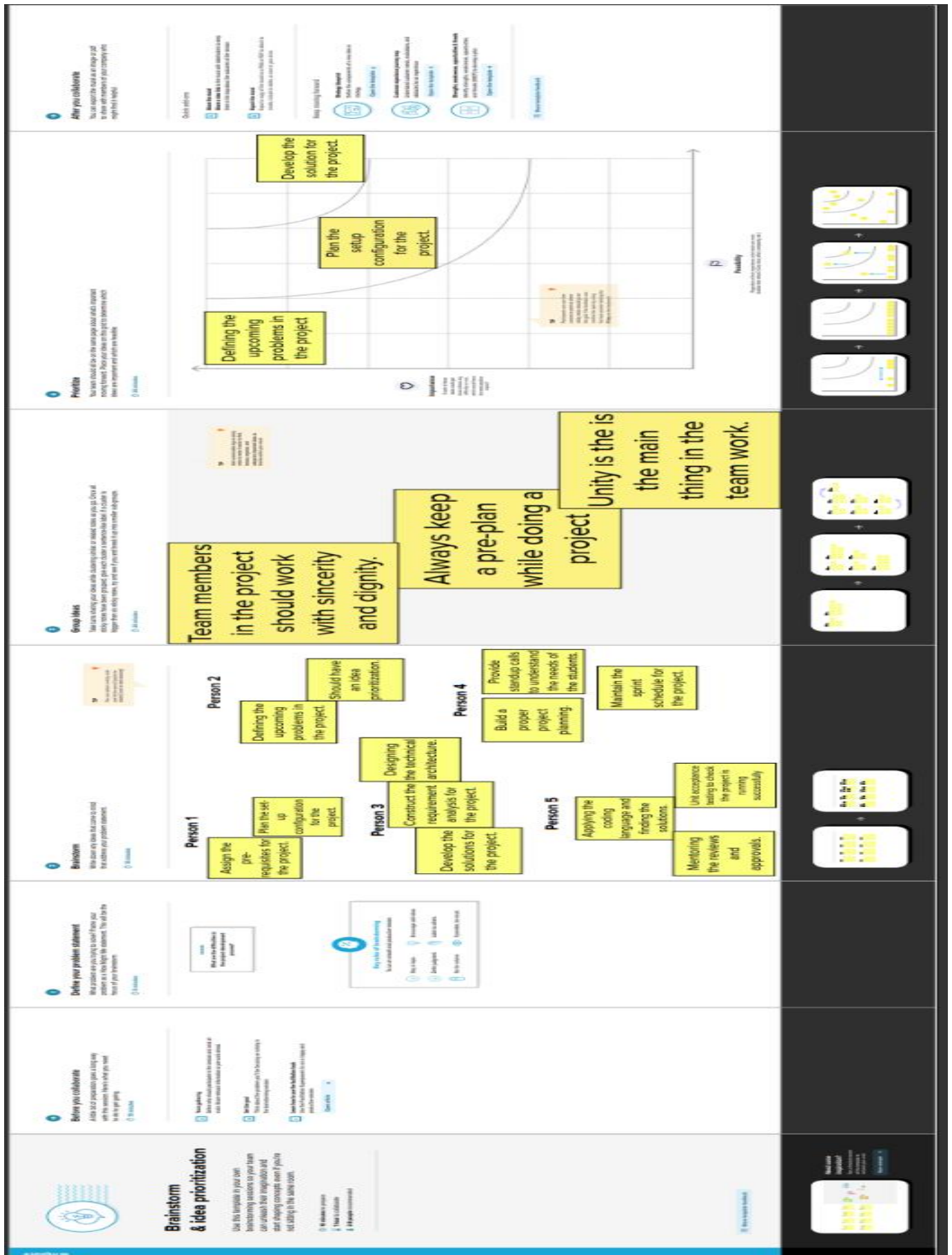
Does

What behavior have we observed?
What can we imagine them doing?



2.2 IDEATION & BRAINSTORMING MAP:

Pasting the ideation & brainstorming Map screenshot.

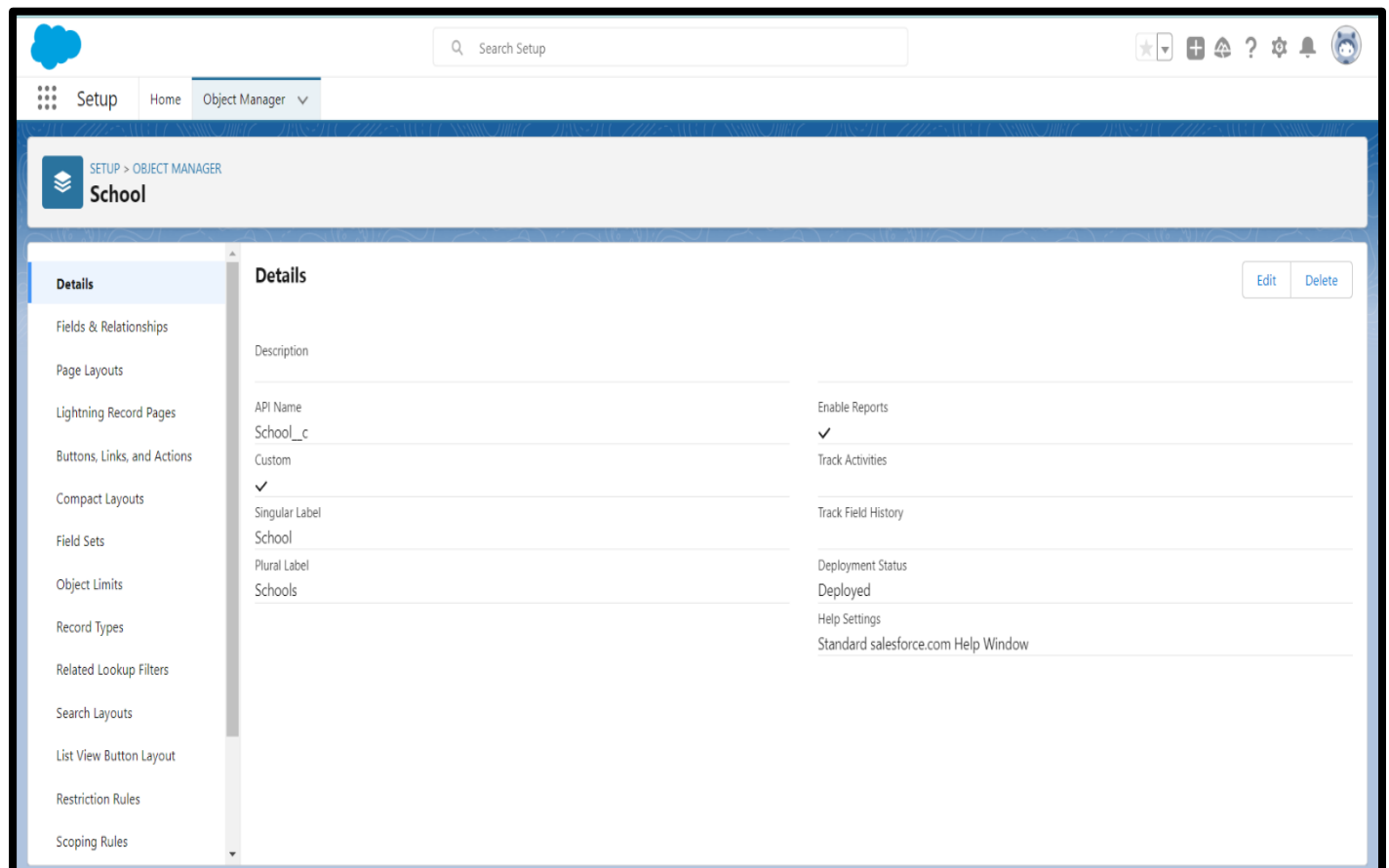


3. RESULT:**3.1 DATA MODEL:**

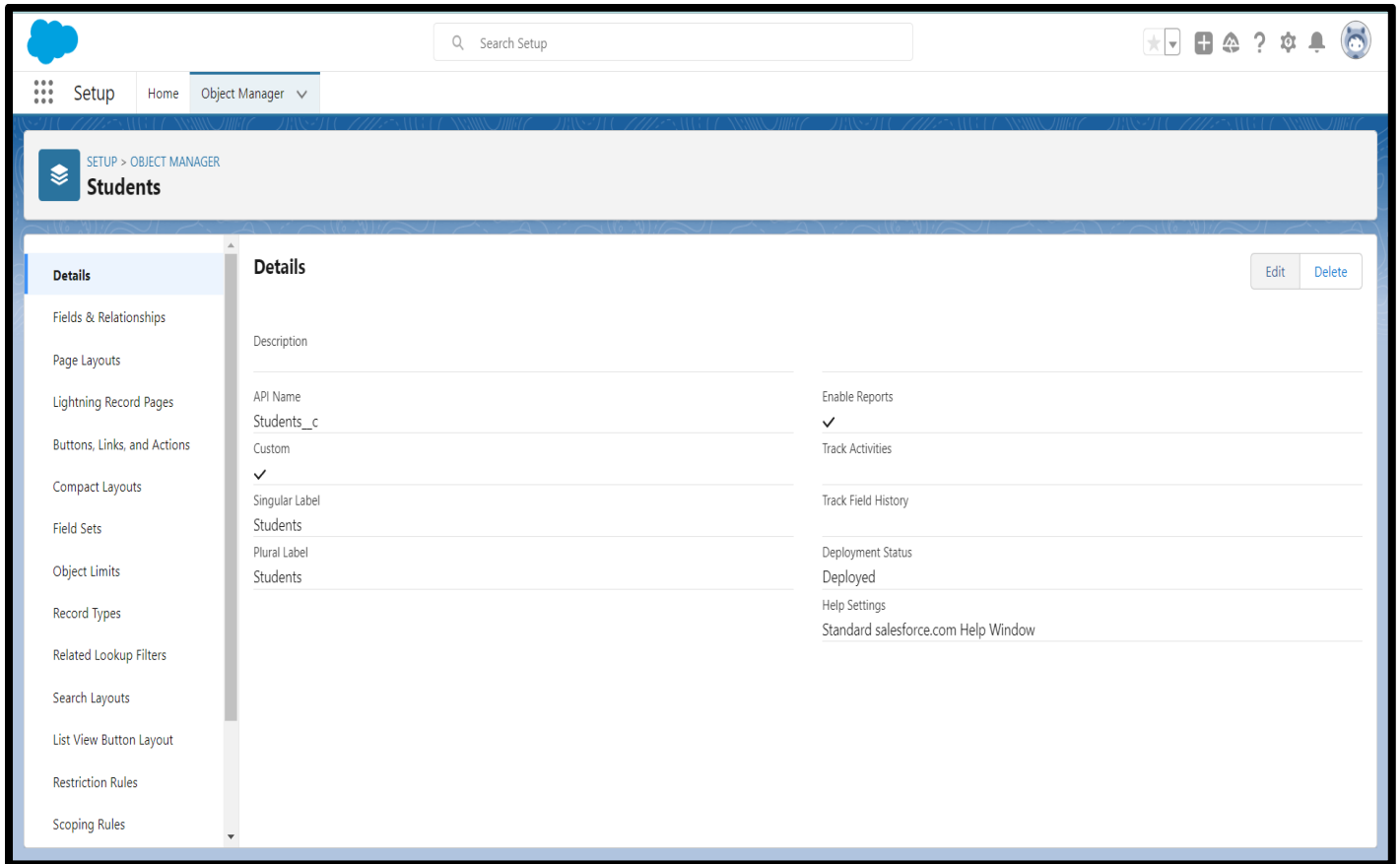
Object name	Fields in the object	
<u>Object 1:</u>	Field label	Data type
	School	Text Area
	Student	Picklist
<u>Object 2:</u>	Field label	Data type
	Parents	Text Area
	Student	Master-detail relationship

3.2 ACTIVITY & SCREENSHOTS:

Attaching the screenshots of the project “A CRM Applications for Schools and Colleges” along with the description.

MILESTONE-2: OBJECT**ACTIVITY-1: Creation of School object****Creation of objects for School Management:**

ACTIVITY 2: Create Student Object:

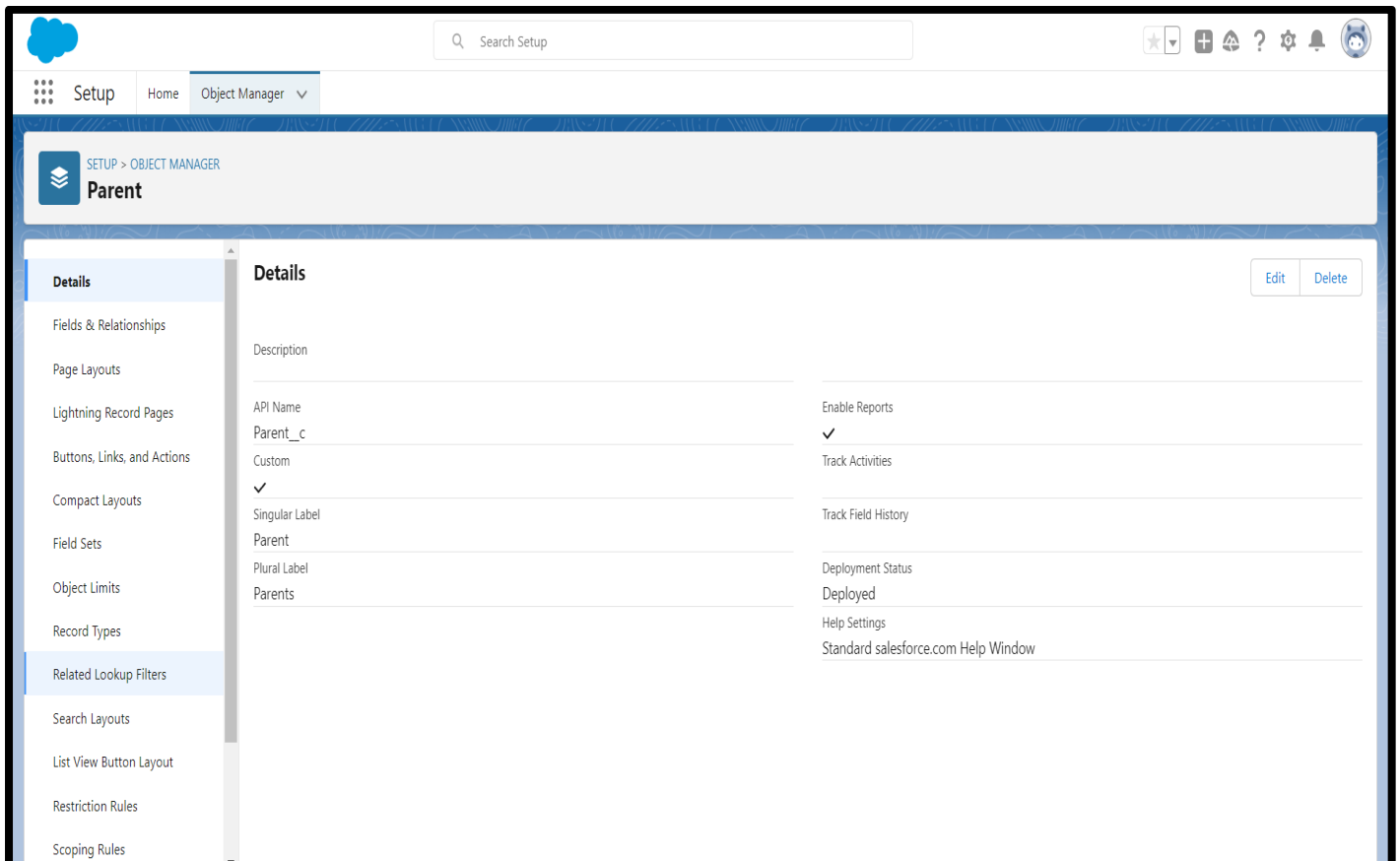


The screenshot shows the Salesforce Setup interface for creating a new object named "Students". The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Students" and includes a "Details" section with the following fields:

Field	Value
Description	
API Name	Students__c
Custom	✓
Singular Label	Students
Plural Label	Students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for "Edit" and "Delete" are located in the top right corner of the details section.

ACTIVITY 3: Create Parent Object:



The screenshot shows the Salesforce Setup interface for creating a new object named "Parent". 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, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Parent" and includes a "Details" section with the following fields:

Field	Value
Description	
API Name	Parent__c
Custom	✓
Singular Label	Parent
Plural Label	Parents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for "Edit" and "Delete" are located in the top right corner of the details section.

MILESTONE-3: LIGHTNING APP

ACTIVITY:

Create the School Management App:

The screenshot shows the Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', 'School Mangement', and a 'Help' icon. The left sidebar shows 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'.

The main content area is titled 'App Details & Branding' and includes the instruction: '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 Mangement
- * Developer Name: Rushmiya
- Description: Schools, Students, Reports, and Dashboards

App Branding:

- Image: [Upload button]
- Primary Color Hex Value: #0070D2

Org Theme Options:

- ☒ Use the app's image and color instead of the org's custom theme

App Launcher Preview:

SM School Mangement
Schools, Students, Reports, and Dashboards

MILESTONE-4: FIELDS AND RELATIONSHIP

ACTIVITY-1

Creation of fields for the School objects:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar shows 'Setup > OBJECT MANAGER' with sub-items: 'Details', 'Fields & Relationships' (selected), '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', and 'Scoping Rules'.

The main content area is titled 'New Custom Field' and includes the instruction: 'Step 4. Add to page layouts'. The field is named 'Address' and is a 'Text Area' type.

Field Details:

- Field Label: Address
- Data Type: Text Area
- Field Name: Address
- Description: [Empty]

Page Layouts:

- ☒ Add Field Page Layout Name
- ☒ School Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Setup

Home

Object Manager

Search Setup

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

Restriction Rules

Scoping Rules

School

New Custom Field

Help for this Page

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label	District
Data Type	Text Area
Field Name	District
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	School Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous

Save & New

Save

Cancel

Setup

Home

Object Manager

Search Setup

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

Restriction Rules

Scoping Rules

School

New Custom Field

Help for this Page

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label	State
Data Type	Text Area
Field Name	State
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	School Layout


When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous








Save & New

Save

Cancel



school webs



SetupHomeObject 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

Restriction Rules

Scoping Rules

School Custom Field

School websites

Back to School

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	School websites	Object Name	School
Field Name	School_websites	Data Type	Text Area
API Name	School_websites__c		
Description	Helps the students to search for better schools		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya_K	Modified By	Rushmiya_K
	11/04/2023, 5:31 pm		12/04/2023, 5:59 pm

General Options

Required☐


Default Value

Validation Rules








New

Validation Rules Help

No validation rules defined.



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Data.com Company

Details

Fields & Relationships

Page Layouts

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Related Lookup Filters

Validation Rules

Data.com Company Field

Phone Number

Back to Data.com Company Fields

Field Information

Field Label	Phone Number	Field Name	Phone
Data Type	Phone		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

ACTIVITY-2:

This screenshot shows the 'Results' custom field definition for the 'Students' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled 'Students Custom Field Results' with a 'Back to Students' link. It includes a 'Validation Rules' link and a 'Custom Field Definition Detail' section with buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists: Field Label (Results), Field Name (Results), API Name (Results_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Created By' is Rushmiya K. (11/04/2023, 6:01 pm) and 'Modified By' is Rushmiya K. (11/04/2023, 6:01 pm). The 'General Options' section shows 'Required' as unchecked and 'Default Value' as an information icon. The 'Picklist Options' section shows 'Restrict picklist to the values defined in the value set' as checked and 'Controlling Field' as '[New]'. A 'Help for this Page' link is in the top right.

Setup > OBJECT MANAGER
Students

Students Custom Field
Results
[Back to Students](#)

[Validation Rules](#)

Custom Field Definition Detail
[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Results	Object Name	Students
Field Name	Results	Data Type	Picklist
API Name	Results_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K. 11/04/2023, 6:01 pm	Modified By	Rushmiya K. 11/04/2023, 6:01 pm

General Options

Required ☐

Default Value [i](#)

Picklist Options

Restrict picklist to the values defined in the value set ☒

Controlling Field [\[New\]](#)

[Help for this Page](#)

This screenshot shows the 'Class' custom field definition for the 'Students' object. The left sidebar is identical to the first screenshot. The main content area is titled 'Students Custom Field Class' with a 'Back to Students' link. It includes a 'Validation Rules' link and a 'Custom Field Definition Detail' section with buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists: Field Label (Class), Field Name (Class), API Name (Class_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Created By' is Rushmiya K. (11/04/2023, 6:02 pm) and 'Modified By' is Rushmiya K. (11/04/2023, 6:02 pm). The 'General Options' section shows 'Required', 'Unique', 'External ID', 'AI Prediction', and 'Default Value' as unchecked. The 'Number Options' section is partially visible at the bottom. A 'Help for this Page' link is in the top right.

Setup > OBJECT MANAGER
Students

Students Custom Field
Class
[Back to Students](#)

[Validation Rules](#)

Custom Field Definition Detail
[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Class	Object Name	Students
Field Name	Class	Data Type	Number
API Name	Class_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K. 11/04/2023, 6:02 pm	Modified By	Rushmiya K. 11/04/2023, 6:02 pm

General Options

Required ☐

Unique ☐

External ID ☐

AI Prediction ☐

Default Value ☐

Number Options

[Help for this Page](#)

The screenshot shows the Salesforce Setup interface for the 'Students' 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, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Students Custom Field Marks' and includes a 'Back to Students' link. Below the title, there are tabs for 'Validation Rules (0)', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays details for the 'Marks' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'General Options' section shows checkboxes for 'Required', 'Unique', 'External ID', 'AI Prediction', and 'Default Value'. The 'Created By' and 'Modified By' fields show the user 'Rushmiya K' and the timestamp '11/04/2023, 6:03 pm'.

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
Scoping Rules

Students Custom Field
Marks
[Back to Students](#)

[Validation Rules \(0\)](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Marks	Object Name	Students
Field Name	Marks	Data Type	Number
API Name	Marks__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K, 11/04/2023, 6:03 pm	Modified By	Rushmiya K, 11/04/2023, 6:03 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

ACTIVITY-3

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, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Parent Custom Field Parent Address' and includes a 'Back to Parent' link. Below the title, there are tabs for 'Validation Rules (0)', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays details for the 'Parent Address' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'General Options' section shows checkboxes for 'Required' and 'Default Value'. The 'Created By' and 'Modified By' fields show the user 'Rushmiya K' and the timestamp '11/04/2023, 6:05 pm'. At the bottom, there is a 'Validation Rules' section with a 'New' button and a message 'No validation rules defined.'.

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
Scoping Rules

Parent Custom Field
Parent Address
[Back to Parent](#)

[Validation Rules \(0\)](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Parent Address	Object Name	Parent
Field Name	Parent_Address	Data Type	Text Area
API Name	Parent_Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K, 11/04/2023, 6:05 pm	Modified By	Rushmiya K, 11/04/2023, 6:05 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules [New](#) [Validation Rules Help ?](#)

No validation rules defined.

Setup

Home

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

Scoping Rules

Parent Custom Field

Parent Number

Back to Parent

Validation Rules

Custom Field Definition Detail

Field Information

Field Label	Parent Number	Object Name	Parent
Field Name	Parent_Number	Data Type	Phone
API Name	Parent_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K. 11/04/2023, 6:07 pm	Modified By	Rushmiya K. 11/04/2023, 6:07 pm

General Options

Required

Default Value

Validation Rules

No validation rules defined.

MILESTONE-5

ACTIVITY

Creation on profile:

Setup

Home

Object Manager

Profiles

Quick Find

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

Queues

Roles

User Management Settings

Users

Profile

School profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name

School profile

User License

Salesforce

Description

Created By

Rushmiya K. 11/04/2023, 7:42 pm

Modified By

Rushmiya K. 11/04/2023, 7:48 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]

MILESTONE-6 USERS

ACTIVITY:

Creating a Users:

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

Queues

Roles

User Management Settings

Users

Search Setup

Quick Find

Setup Users

User Profile Help for this Page

User Detail

Name: Rushmiya K

Alias: k. r

Email: miyarathi@gmail.com

Username: parentsmyiarathi@gmail.com

Nickname: User16812229647481942454

Title: A CRM Application for Schools and Colleges

Company: Government Arts and Science College, Kanyakumari

Department: Mathematics

Division: III Year

Address: K Rushmiya D/O S. Kanmani, Arasady street, Madampillatharman, Tirunelveli 627114, Tamil Nadu, India

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale: English (India)

Language: English

Delegated Approver: Manager

Manager: Manager

Receive Approval Request Emails: Only if I am an approver

Federation ID:

Role: Salesforce

User License: Salesforce

Profile: Custom: Sales Profile

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Mobile Push Registrations: View

Data.com User Type:

Accessibility Mode (Classic Only): ☐

Debug Mode: ☐

High-Contrast Palette on Charts: ☐

App Registration: One-Time Password

Load Lightning Pages While Scrolling: ☒

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

Queues

Roles

User Management Settings

Users

Search Setup

Quick Find

Setup Users

User Profile Help for this Page

User Detail

Name: Rushmiya K

Alias: rk

Email: miyarathi@gmail.com

Username: teachersmyiarathi@gmail.com

Nickname: User16812235283934075787

Title: A CRM Application for Schools and colleges

Company: Government Arts and Science College, Kanyakumari

Department: Mathematics

Division: III Year

Address: K Rushmiya D/O S. Kanmani, Arasady street, Madampillatharman, Tirunelveli 627114, Tamil Nadu, India

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale: English (India)

Language: English

Delegated Approver: Manager

Manager: Manager

Receive Approval Request Emails: Only if I am an approver

Federation ID:

Role: Partner App Subscription

User License: Partner App Subscription

Profile: Partner App Subscription User

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Mobile Push Registrations: View

Data.com User Type:

Accessibility Mode (Classic Only): ☐

Debug Mode: ☐

High-Contrast Palette on Charts: ☐

App Registration: One-Time Password

Load Lightning Pages While Scrolling: ☒

The screenshot shows the Salesforce Setup interface. On the left is a navigation sidebar with sections like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION'. Under 'ADMINISTRATION', the 'Users' section is expanded, showing options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'.

The main content area is titled 'Users' and displays the profile for 'Rushmiya K'. At the top, there are links for 'Permission Set Assignments', 'Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Connected Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'.

Below the user name, there are buttons for 'Edit', 'Sharing', 'Reset Password', and 'Freeze'. The 'User Detail' section is divided into two columns:

User Detail	
Name	Rushmiya K
Alias	rk
Email	myarathi@gmail.com
Username	principalsmyarathi@gmail.com
Nickname	User1681223748836818385
Title	A CRM Application for Schools and Colleges
Company	Government Arts and Science College, Kanyakumari
Department	Mathematics
Division	III Year
Address	K Rushmiya D/O S Kanmani, Arasady street, Madampillaitharam, Tirunelveli 627114, Tamil Nadu
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
Role	Partner App Subscription
User License	Partner App Subscription User
Profile	Partner App Subscription User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	View
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>

MILESTONE-7 PERMISSION SETS

ACTIVITY-1

Permission sets:

The screenshot shows the Salesforce Setup interface for a 'Permission Set'. The left sidebar is the same as in the previous screenshot, with 'Permission Sets' selected under the 'ADMINISTRATION' section.

The main content area is titled 'Permission Sets' and displays the details for a 'Teacher Permission' set. At the top, there are buttons for 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments'.

The 'Permission Set Overview' section shows the following details:

Permission Set Overview	
Description	Guiding the students in the right path
License	
Session Activation Required	<input checked="" type="checkbox"/>
Last Modified By	Rushmiya K, 11/04/2023, 8:26 pm
API Name	Teacher_Permission
Namespace Prefix	
Created By	Rushmiya K, 11/04/2023, 8:20 pm

Below the overview, there is a section titled 'Apps' which lists various permission categories:

- 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
- Visualforce Page Access**: Permissions to execute Visualforce pages
- External Data Source Access**: Permissions to authenticate against external data sources

At the bottom, there is a note: 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform' and a link to 'Learn More'.

ACTIVITY-2

Permission Sets 2:

Permission Set
Principle permission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	Head of the Administration of Schools and colleges	API Name	Principle_permission
License		Namespace Prefix	
Session Activation Required	<input checked="" type="checkbox"/>	Created By	Rushmiya K, 11/04/2023, 8:32 pm
Last Modified By	Rushmiya K, 11/04/2023, 8:32 pm		

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

Visualforce Page Access
Permissions to execute Visualforce pages

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

External Data Source Access

MAILSTONE-8: REPORTS

ACTIVITY:

Reports:

SETUP > OBJECT MANAGER
Contact

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
Hierarchy Columns
Screening Rules

Contact Field
Reports To
[Back to Contact Fields](#)

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Reports To	Field Name	ReportsTo
Data Type	Lookup(Contact)		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Lookup Filter
No lookup filters defined.

Validation Rules
No validation rules defined.

[Validation Rules Help](#)

4. TRAILHEAD PROFILE PUBLIC URL

- **Team leader** : <https://trailblazer.me/id/rkanmani>
- **Team Member 1** : <https://trailblazer.me/id/priya3090>
- **Team Member 2** : <https://trailblazer.me/id/sjenifa>
- **Team Member 3** : <https://trailblazer.me/id/snekam8220>
- **Team Member 4** : <https://trailblazer.me/id/snithya12>

5. ADVANTAGES & DISADVANTAGE:

List of advantages and disadvantages of the proposed solution.

ADVANTAGES	DISADVANTAGES
<ul style="list-style-type: none">• Helps the students to improve their knowledge.	<ul style="list-style-type: none">• Most of the students doesn't have laptop to do their project.
<ul style="list-style-type: none">• Lead a way create job opportunity.	<ul style="list-style-type: none">• Internet Problem.
<ul style="list-style-type: none">• Makes us to understand the Customer Relationship Management	<ul style="list-style-type: none">• Don't have enough time to complete the project.
<ul style="list-style-type: none">• Got an idea about Project Development Process.	<ul style="list-style-type: none">• Fear to chat with Salesforce Administrator.
<ul style="list-style-type: none">• Creating Empathy Map.	<ul style="list-style-type: none">• Log in & Sign Up problems.

6. APPLICATIONS:

The area where this solution can be applied.

- It helps to create and develop new applications (app).
- Mainly helps to understand the customer mindset, while buying the product.
- It is also useful in cloud computing.

7. CONCLUSION:

- This project is a great path for the students who is seeking for bright future. This project mainly explains about the Customer Relationship Management.
- A great thankful to the team members of "NaanMudhalvan" who has worked a lot to provide us knowledge. And, again a great thankful to the "Salesforce Administrator" who is responding to our complaints and queries.

8. FUTURE SCOPE:

Today the world is fully computerised, so this project helps us to acquire some knowledge to access applications in the computer.

The world's first billionaire is "Jeff Bezos", who is the owner of the amazon app, because today everything is happening through online, we can bill, shop, transfer money. And everything depends on salesforce and customer relationship management, because while sale a product we should fulfil the customer needs and the customer

wants to satisfied, so that the customer will come again to buy a new product. So customer relationship management is much essential in today's world. And this field will have a stunning scope in future.