

Project Report Template

1. INTRODUCTION

1.1 Overview

A school management CRM is a software tool designed to help schools and educational institutions manage their interactions with students, parents, teachers and other stakeholders with a school management CRM, you can:

Keep track of student and parent contact information, including phone numbers, email addresses, and physical addresses.

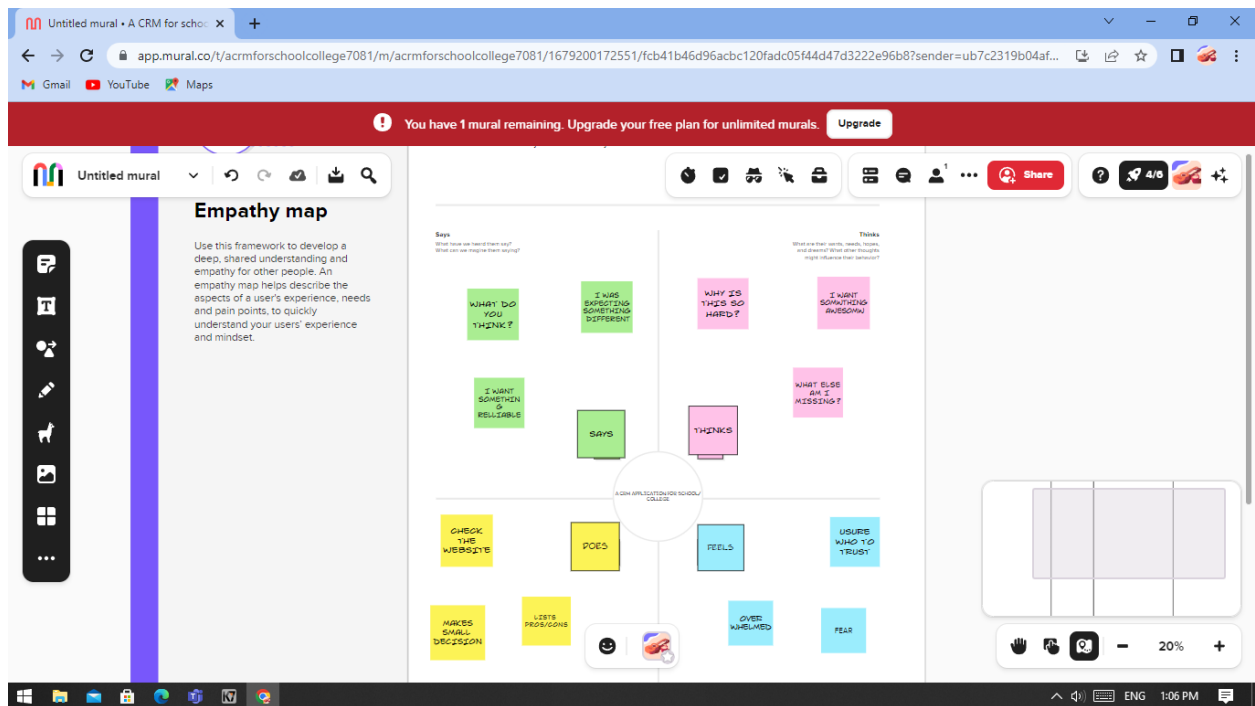
Track and analyze student performance and progress.

1.2 Purpose

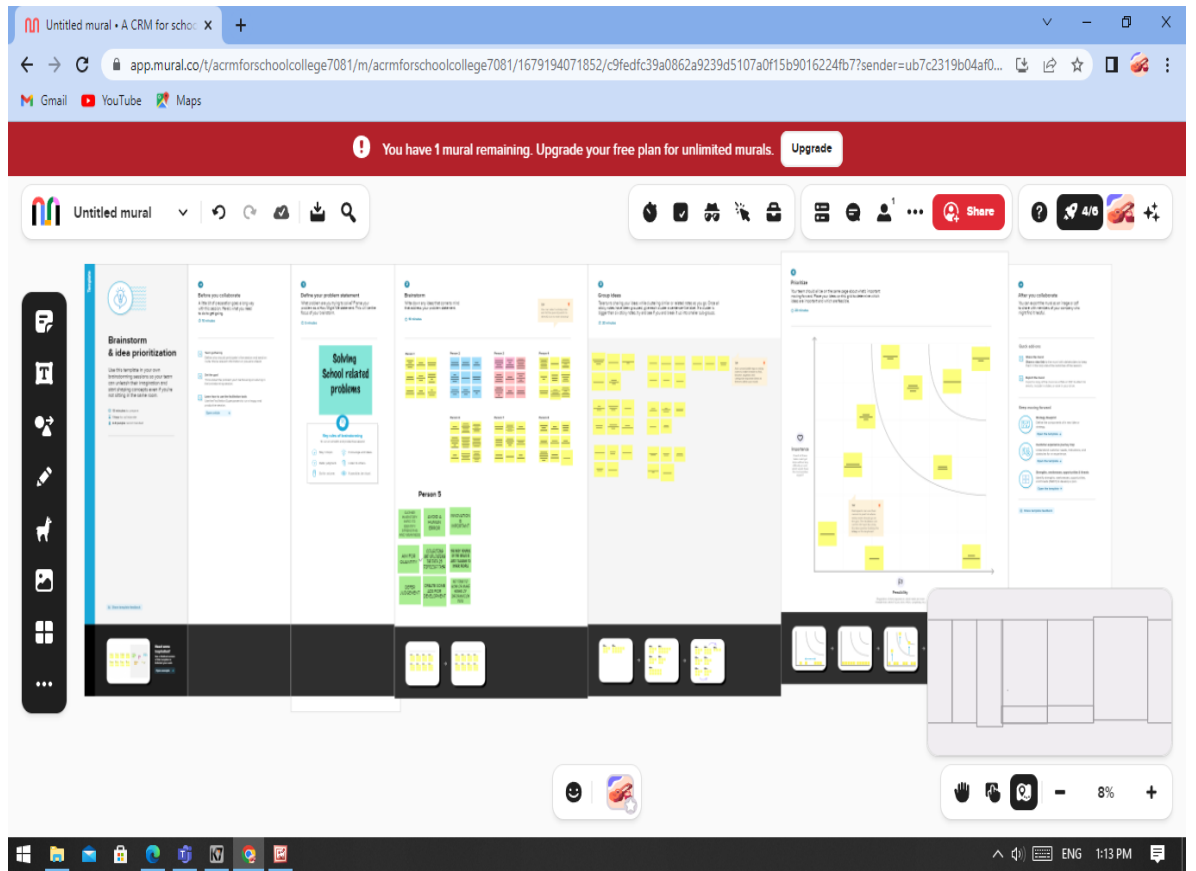
A school management CRM helps to streamline and automate many of the administrative tasks associated with running a school, making it easier for educators to focus on their primary goal of providing a high-quality education to their students

2. Problem definition and design thinking

2.1 Empathy Map



2.2 Ideation and Brainstroming map screenshot



3. RESULT

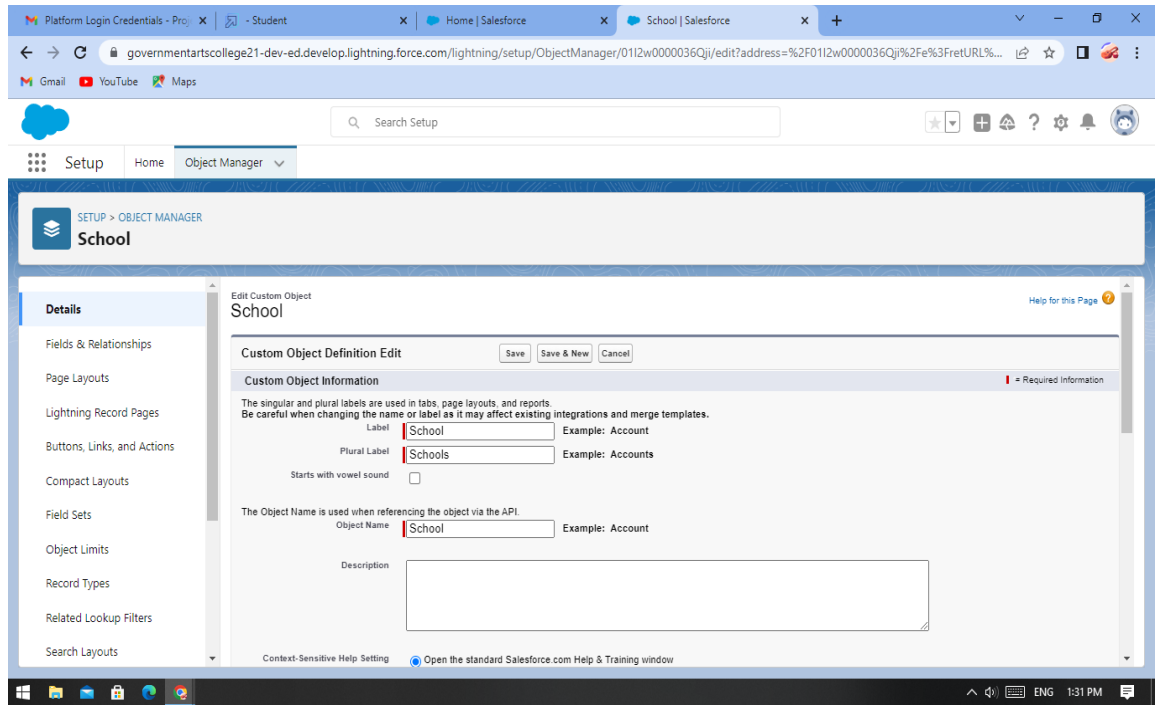
3.1 Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
Object 1: ATTENDEES	Field label	Data type
	Enter id	Auto number
	Phone	Phone
Object 2: SPEAKER	Field label	Data type
	Enter bio	Text Area
	Email	e-mail

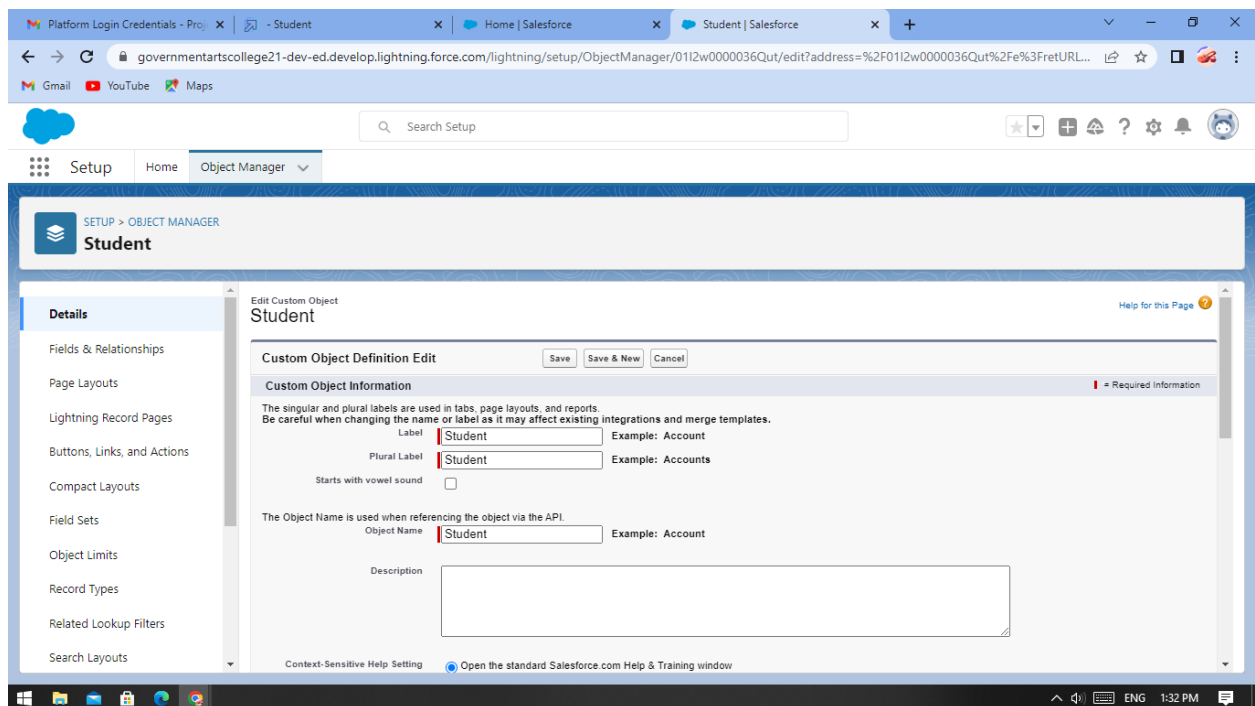
3.2 Activity and Screenshot:

Milestone:2 Object

Activity-1:



Activity 2:



Milestone-4: Fields and Relationship

Activity-1:

The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the 'School' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: 1223344556 (Percent(18, 0)), AVVAIYAR GOVERNMENT GIRLS HIGHER SECONDARY SCHOOL (Text(80)), Created By (Lookup(User)), Last Modified By (Lookup(User)), and Owner (Lookup(User,Group)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
1223344556	X1223344556__c	Percent(18, 0)		
AVVAIYAR GOVERNMENT GIRLS HIGHER SECONDARY SCHOOL	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Activity-2:

The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the 'Student' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: 14A, Gandhi nagar,Dharmapuri (Text Area(255)), 188, Nehru Street, Delhi (Text Area(255)), 9282726252 (Phone), Avvaiyar Govt Girls@gmailcom (Text Area(255)), Created By (Lookup(User)), Jessica (Text(80)), and Last Modified By (Lookup(User)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
14A, Gandhi nagar,Dharmapuri	X14A_Gandhi_nagar_Dharmapuri__c	Text Area(255)		
188, Nehru Street, Delhi	X188_Nehru_Street_Delhi__c	Text Area(255)		
9282726252	X9282726252__c	Phone		
Avvaiyar Govt Girls@gmailcom	Avvaiyar_Govt_Girls_gmailcom__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Jessica	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		

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, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Parent' object. 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, and Parent Name.

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 Name	Name	Text(80)		✓

Milestone-5: Profile

Activity:

The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a navigation menu with options like Users, Profiles, Data, Feature Settings, Data.com, Prospecter Preferences, Prospecter Users, Functions, Marketing, Lead Processes, Sales, Products, and Asset Settings. The main content area is titled 'Profiles' and shows a table of profiles for the 'Parent' object. The table has columns for Action, Profile Name, and User License. The profiles listed are Work.com Only User, System Administrator, Standard User, Analytics Cloud Integration User, Standard Platform User, Solution Manager, Silver Partner User, Salesforce API Only System Integrations, Read Only, and Partner Community User.

Action	Profile Name	User License
<input type="checkbox"/> Edit Clone	Work.com Only User	Work.com Only
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce
<input type="checkbox"/> Edit Clone	Standard User	Salesforce
<input type="checkbox"/> Edit Del ...	standard user	Analytics Cloud Integration User
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration
<input type="checkbox"/> Edit Del ...	Read Only	Salesforce
<input type="checkbox"/> Edit Clone	Partner Community User	Partner Community

Milestone-6: Users

Activity:

The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'Users' and 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: Chatter Expert (Chatter), B. Balu (Balu), B. SHALINI (SR), B. Shanthi (SR), S. Renuka (RS), User_Integration (intev), User_Security (sec), and V. Jessica (JV). The table also includes buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

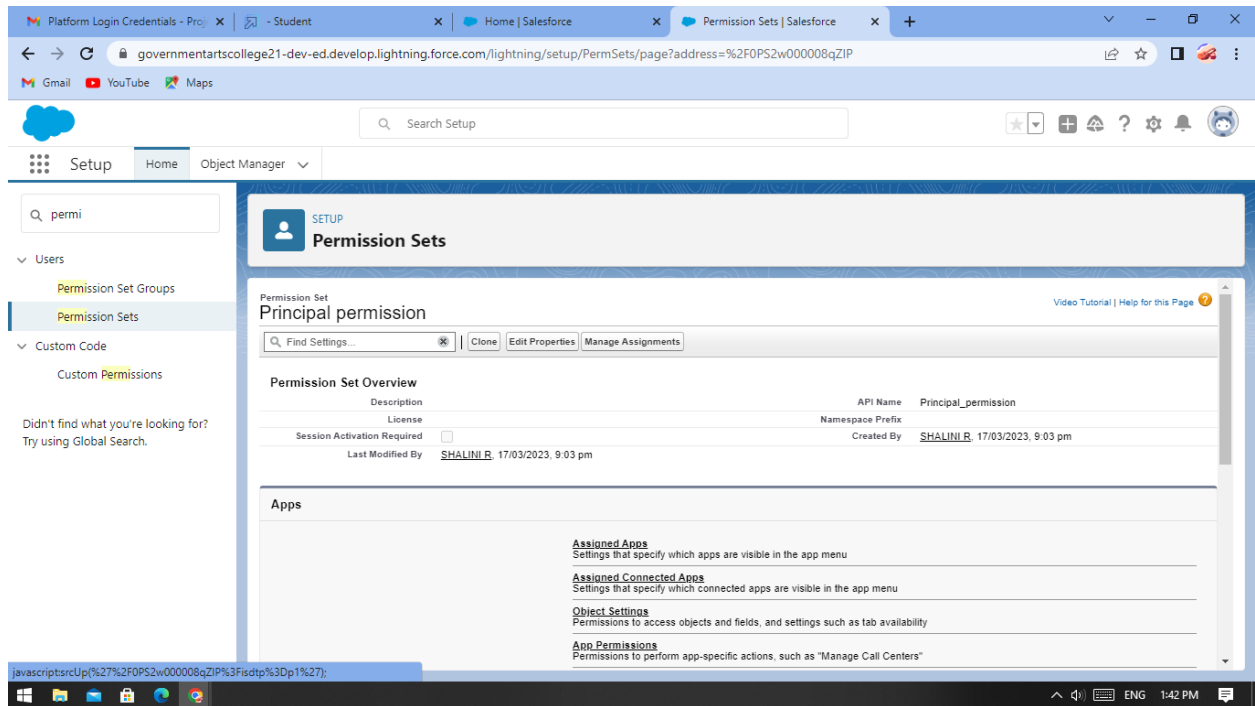
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chath.00d2w00000roox5eab.yvvisidewnu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	B. Balu	balu	balu078@gmail.com	Director_Channel Sales	✓	Standard Platform User
<input type="checkbox"/> Edit	B. SHALINI	SR	shalupac@organization.com		✓	System Administrator
<input type="checkbox"/> Edit	B. Shanthi	SR	shanthi088@gmail.com	CEO	✓	Standard Platform User
<input type="checkbox"/> Edit	S. Renuka	RS	renuga123@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	User_Integration	intev	integration@00d2w00000roox5eab.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d2w00000roox5eab.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	V. Jessica	JV	jessica587@gmail.com	Director_Channel Sales	✓	Standard Platform User

Milestone:7: Permission sets Activity-1:

The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a search bar, a 'View' dropdown set to 'All Permission Sets', and a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The permission sets listed are: Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Experience Profile Manager, Facility Manager, FieldServiceMobileStandardPermSet, Merchandiser, and Order Management Agent. The table also includes buttons for 'New', 'Clone', 'Delete', and 'Create New View'.

Action	Permission Set Label	Description	License
<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
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service m...	Field Service Mobile
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Se...
<input type="checkbox"/> Clone	Order Management Agent	Read access in all entities enabled by Order Management	Unbillion Order Management User

Activity-2:



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar and a navigation menu with 'Users', 'Permission Set Groups', 'Permission Sets', and 'Custom Code'. The main content area is titled 'Permission Sets' and shows a 'Principal permission' set. Below the title, there are tabs for 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments'. The 'Permission Set Overview' section displays details for the 'Principal_permission' set, including its API Name, Namespace Prefix, License, Session Activation Required status, Created By (SHALINI R), and Last Modified By (SHALINI R) on 17/03/2023 at 9:03 pm. The 'Apps' section lists 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

Platform Login Credentials - Pro x Student x Home | Salesforce x Permission Sets | Salesforce x +

governmentartscollege21-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000008qZIP

Gmail YouTube Maps

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

Permission Set

Principal permission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description

License

Session Activation Required

Last Modified By

API Name

Namespace Prefix

Created By

Principal_permission

SHALINI R 17/03/2023, 9:03 pm

SHALINI R 17/03/2023, 9:03 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

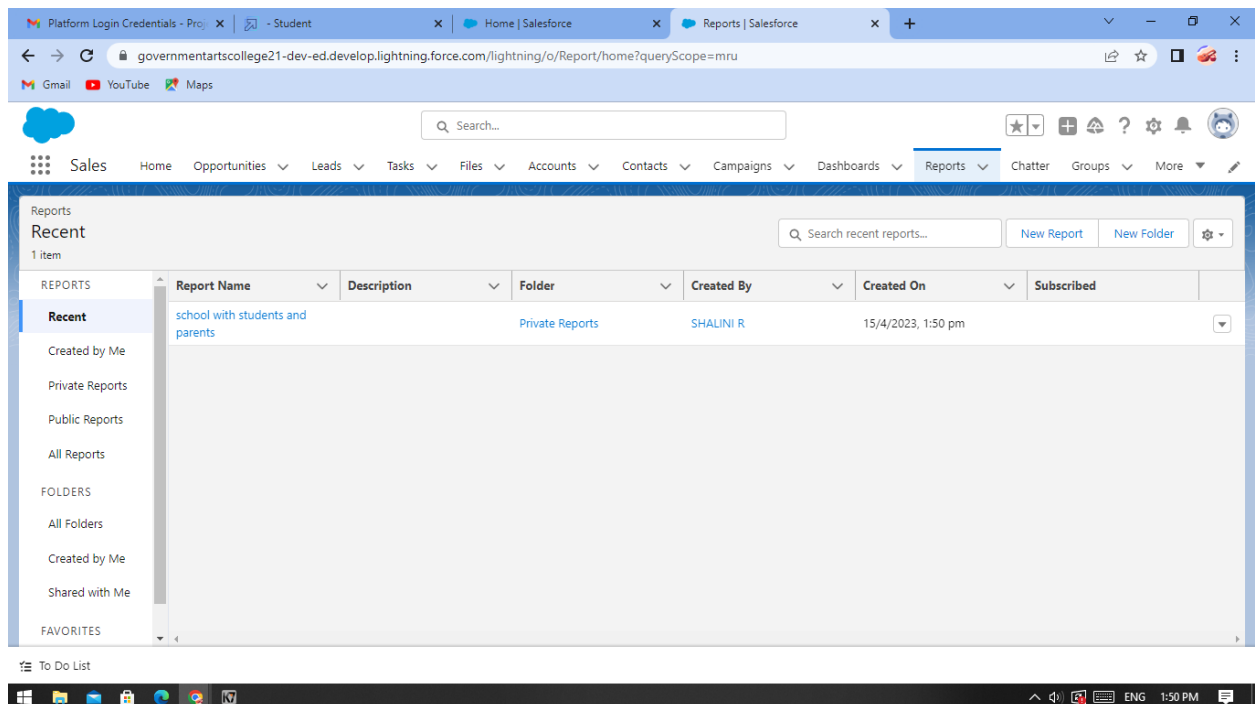
Permissions to perform app-specific actions, such as "Manage Call Centers"

javascriptsrcUp(%27%2F0PS2w000008qZIP%3Fsidtp%3Dp1%27);

Windows taskbar: File Explorer, Edge, Chrome, ENG, 1:42 PM

Milestone-8: Reports

Activity:



The screenshot shows the Salesforce Reports interface. The left sidebar contains a search bar and a navigation menu with 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', and 'More'. The main content area is titled 'Reports' and shows a 'Recent' report. Below the title, there are tabs for 'Search recent reports...', 'New Report', and 'New Folder'. The 'Recent' report is listed with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The report is titled 'school with students and parents' and was created by SHALINI R on 15/4/2023 at 1:50 pm. The 'Folder' is 'Private Reports'.

Platform Login Credentials - Pro x Student x Home | Salesforce x Reports | Salesforce x +

governmentartscollege21-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr

Gmail YouTube Maps

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Reports

Recent

Search recent reports... New Report New Folder

1 item

REPORTS

Report Name Description Folder Created By Created On Subscribed

Recent

school with students and parents

Private Reports

SHALINI R

15/4/2023, 1:50 pm

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

To Do List

Windows taskbar: File Explorer, Edge, Chrome, ENG, 1:50 PM

4. Trailhead Profile Public URL

Team Leader: KAVIYASRI.S – URL: <https://trailblazer.me/id/ksivakumar20>

Team member 1: ABINAYA.S – URL: <https://trailblazer.me/id/abins32>

Team member 2: BAGYA.V – URL: <https://trailblazer.me/id/bagya-sbnm123>

Team member 3: SHALINI.R – URL: <https://trailblazer.me/id/ulash-sbnm123>

Team member 4: ARUNA.G – URL: <https://trailblazer.me/id/aruna113sss>

5. Advantage & Disadvantage

ADVANTAGE:

A School Management CRM helps to streamline and automate many of the administrative tasks associated with running a school, making it easier for educators to focus on their primary goal of providing a high-quality education to their students.

DISADVANTAGE;

A CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it.

It is a huge investment that factors like data mitigation, integration cost, training and support also.

6. Applications

- 1. Customer relationship management systems work wonders for student recruitment in universities around the world every day.**
- 2. If implemented and managed properly, they have the power to minimize workloads, streamline communications and ultimately convert more candidates into enrolled students.**
- 3. The education sector is awash with data from student contact details and learning analytics to operational and administrative systems, your school or college needs a way to organize this information from a single unified location.**
- 4. This article unravels how a CRM enables educational institutions to collect and manage data to provide the best possible experiences for students and staff.**

7. Conclusion:

The above project helps to maintain and manage the school related problems which further can be modified based on the requirements.

It also to provide real-time knowledge for the 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 Salesforce.

8. Future Scope:

- 1. Customer Intelligence is king.**
- 2. APIs and Integrations.**
- 3. Keeping customers happy keeps them coming back.**
- 4. More, Deeper Automations.**
- 5. Personalization Is key.**