

# PROJECT REPORT

## A CRM APPLICATION FOR SCHOOLS/COLLEGES OF THE PROJECT

### 1. INTRODUCTION

#### 1.1 Overview

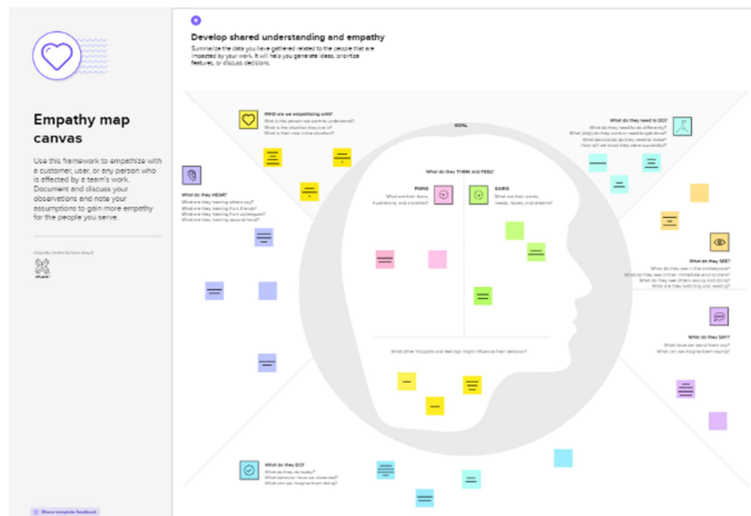
The education sector is one of the most critical sectors in any society. Proper management of schools is necessary to ensure that students receive the best education possible. The management of schools involves several tasks, such as student enrolment, fee collection, exam management, library management, and more. To simplify these tasks, an application for school management can be created using Salesforce.

#### 1.2 Purpose

The purpose of this project is to create an application that can help school administrators manage their day-to-day tasks. This application will automate various tasks such as student enrolment, fee collection, exam management, library management, and more. With this application, school administrators can easily manage their operations and provide a better learning experience for their students.

### 2. PROBLEM DEFINITION & DESIGN THINKING

#### 2.1 Empathy Map



#### 2.2 Ideation & Brainstorming Map

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!

**Vikram A**

TV Ads	Social media promotion	

**Tamilvanan N**

Social media ad		

**Yuganraj R**

NEWS REPORTED	DRUGS WITHIN A CLOSE PLACE	

**Vignesh I**

NEWS REPORTED		

**Person 5**


**Person 6**


**Person 7**


**Person 8**


**3. RESULT****3.1 Data Model:**

Object name	Fields in the Object	
Object 1	Field label	Data type
	Address	Text Area
	Phone number	phone
Object 2	Field label	Data type
	Class	Number
	Parent Address	Text Area

**3.2 Activity and Screenshot****MILESTONE:8**

SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterGroupsMore

REPORTNew Students ReportStudents

OutlineFilters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Students: ID

Students: Student Name

Students: Owner Name

Students: Owner Alias

Students: Created Date

Students: Last Modified Date

Students: Created By

Previewing a limited number of records. Run the report to see everything.

Students: IDStudents: Student NameStudents: Owner NameStudents: Owner AliasStudents: Created DateStudents: Last Modified DateStudents: Created By

No records returned. Try editing report filters.

Show All students.

Edit other filters in the filter panel.

To Do List

## MILESTONE:5

SETUPProfiles

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 (0)Enabled Apex Class Access (0)Enabled External Data Source Access (0)Enabled Named Credential Access (0)Enabled Custom Metadata Type Access (0)Enabled Custom Setting Definitions Access (0)Enabled Flow Access (0)Enabled Service Presence Status Access (0)Enabled Custom Permissions (0)

Profile Detail

NameSchool profile

User LicenseAnalytics Cloud Integration User

Description

Created ByVIKRAMA 19/04/2023, 9:35 pm

Custom Profile

Modified ByVIKRAMA 19/04/2023, 9:41 pm

Page Layouts

Standard Object Layouts

GlobalGlobal LayoutView Assignment

Email ApplicationNot AssignedView Assignment

Home Page LayoutHome Page DefaultView Assignment

AccountAccount LayoutView Assignment

Alternative Payment MethodAlternative Payment Method Layout

Object MilestoneObject Milestone LayoutView Assignment

Operating HoursOperating Hours LayoutView Assignment

OpportunityOpportunity LayoutView Assignment

Opportunity ProductOpportunity Product LayoutView Assignment

OrderOrder Layout

## MILESTONE:7

Setup

Home

Object Manager

Q permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?

Try using Global Search.

2 assignments were successful.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
VIKRAM A	Salesforce			Success
VIKRAM A	Salesforce			Success

Done

## MILESTONE:6

SETUP

Users

All Users

Help for this Page

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

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A VIKRAM	VA	vicki@artscollege.com		✓	System Administrator
<input type="checkbox"/> Edit	A VIKRAM	va	vikramemphyvicki@gmail.com		✓	Custom Sales Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5i00000ch1sneat.50b9ihskeazv@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5i00000ch1sneat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5i00000ch1sneat.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

## MILESTONE:

School  
New Custom Field

Help for this Page

Step 4. Add to page layouts

Previous Save & New Save Cancel

Field Label	Address
Data Type	Text Area
Field Name	Address
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

#### 4. TRAILHEAD PROFILE PUBLIC URL

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

Team member 1 <https://trailblazer.me/id/yuraj26>

Team member 2 <https://trailblazer.me/id/ntbse>

Team member 3 <https://trailblazer.me/id/emphy2>

#### 5. ADVANTAGES AND DISADVANTAGES

Advantages:

**Automated Tasks:** The application will automate various tasks, such as enrolment, fee collection, and exam management, which can save time and increase efficiency.

**Streamlined Operations:** The application will streamline the operations of the school, making it easier for administrators to manage their tasks.

**Improved Student Experience:** With the application, school administrators can provide a better learning experience for their students.

**Easy Access to Information:** The application will provide easy access to important information such as student records, library records, and exam results.

Disadvantages:

**Cost:** Creating the application may involve significant costs, such as hiring developers and purchasing software licenses.

**Technical Complexity:** Developing the application can be technically complex, and requires expertise in Salesforce development.

Training: School staff may require training on how to use the application.

## **6. APPLICATIONS:**

The application can be used by schools of all sizes to manage their operations more efficiently. It can also be customized to fit the specific needs of the school.

## **7. CONCLUSION**

**The creation of an application for school management using Salesforce can help schools streamline their operations, save time and increase efficiency, and provide a better learning experience for their students.**

## **8. FUTURE SCOPE**

**The application can be further developed to include additional features such as online classrooms, real-time notifications, and parent-teacher communication. It can also be extended to other educational institutions such as colleges and universities.**