

Project Report

A CRM APPLICATION FOR SCHOOLS AND COLLEGES

1. INTRODUCTION

1.1 Overview

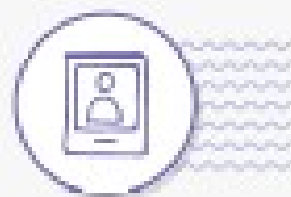
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

1.2 Purpose

The project aim is to maintain and manage the school related problems such as improve enrolments, lead management, student engagement, easy tracking of student performance and attendance.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



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.



Build empathy

What you have here should be representative of the information you've done about your users.



What you

What you

What you



Give them a name and a portrait to empathize with your persona.



Don't

Thinks

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

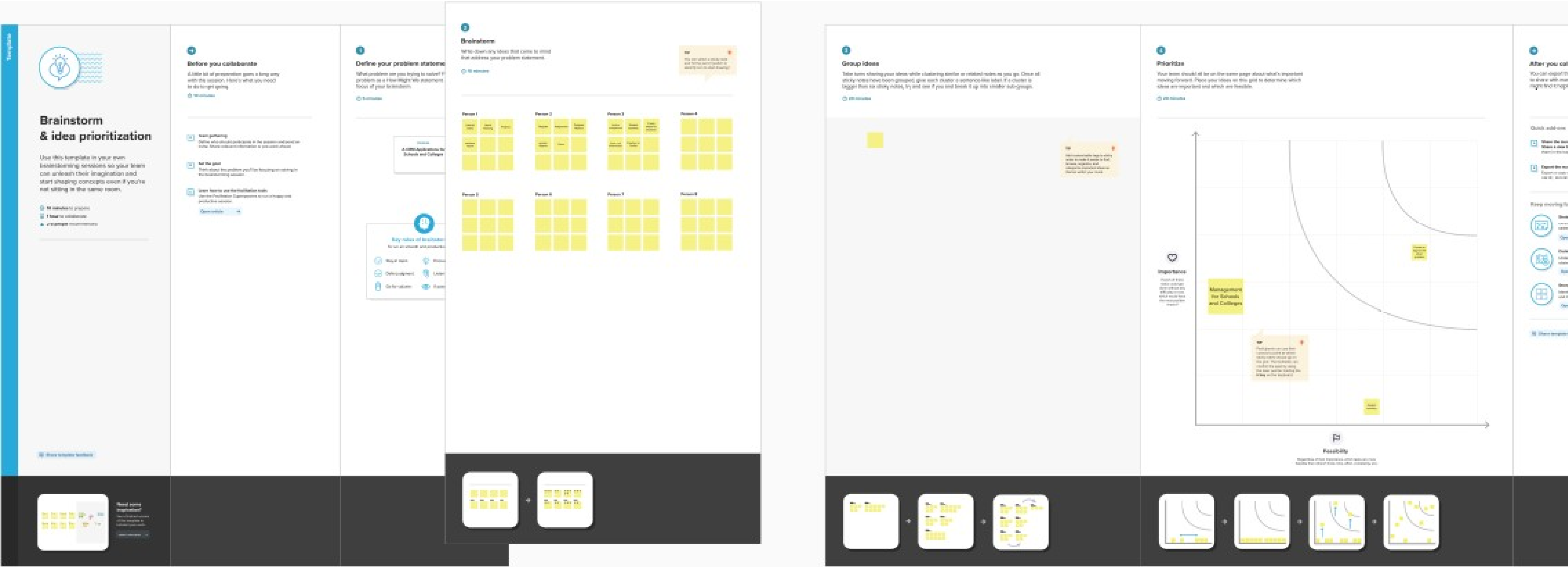
Believes

What you

What you

2.2 IDEATION AND

BRAINSTORMING MAP



3. RESULT

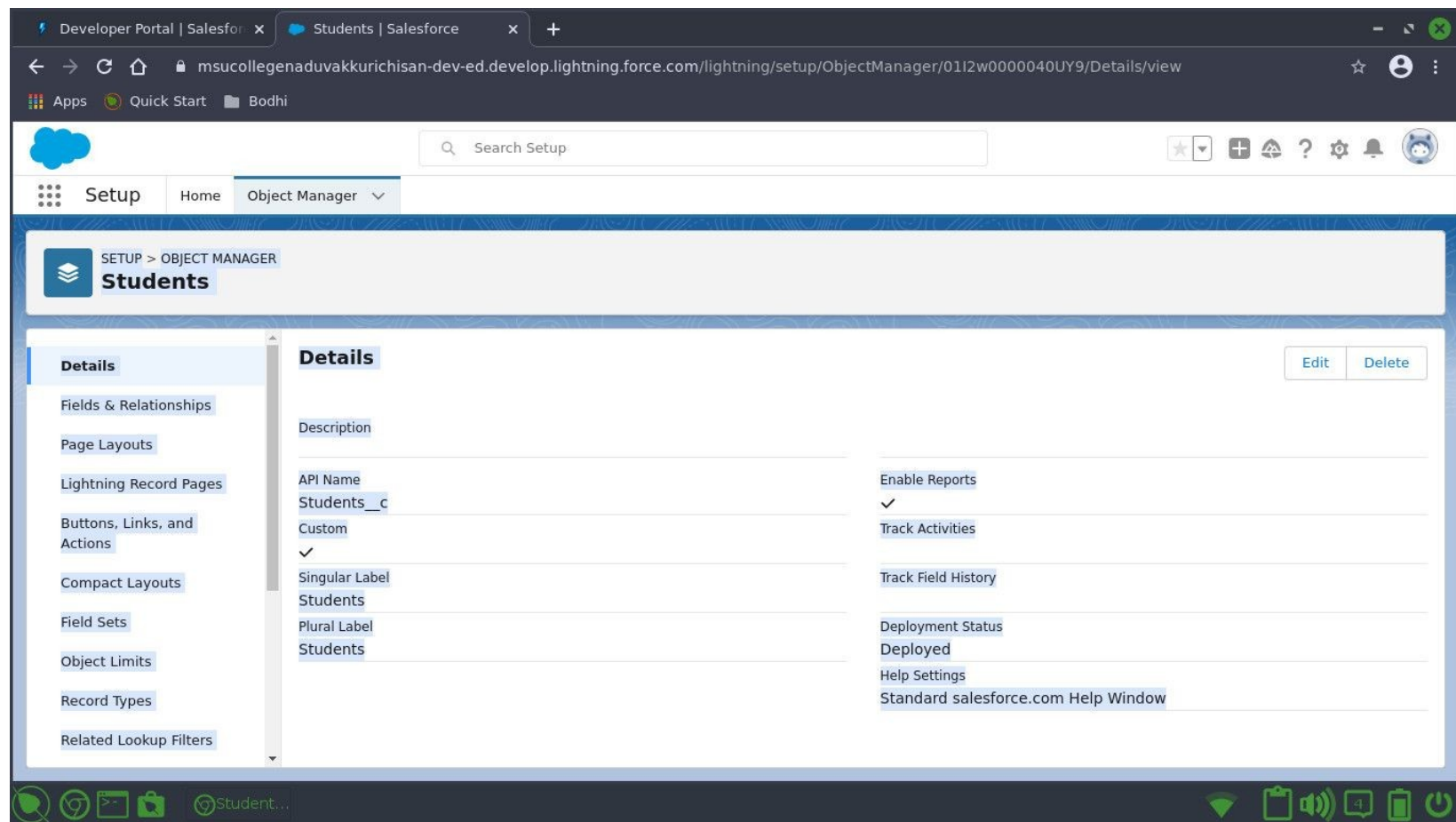
3.1 Data Model

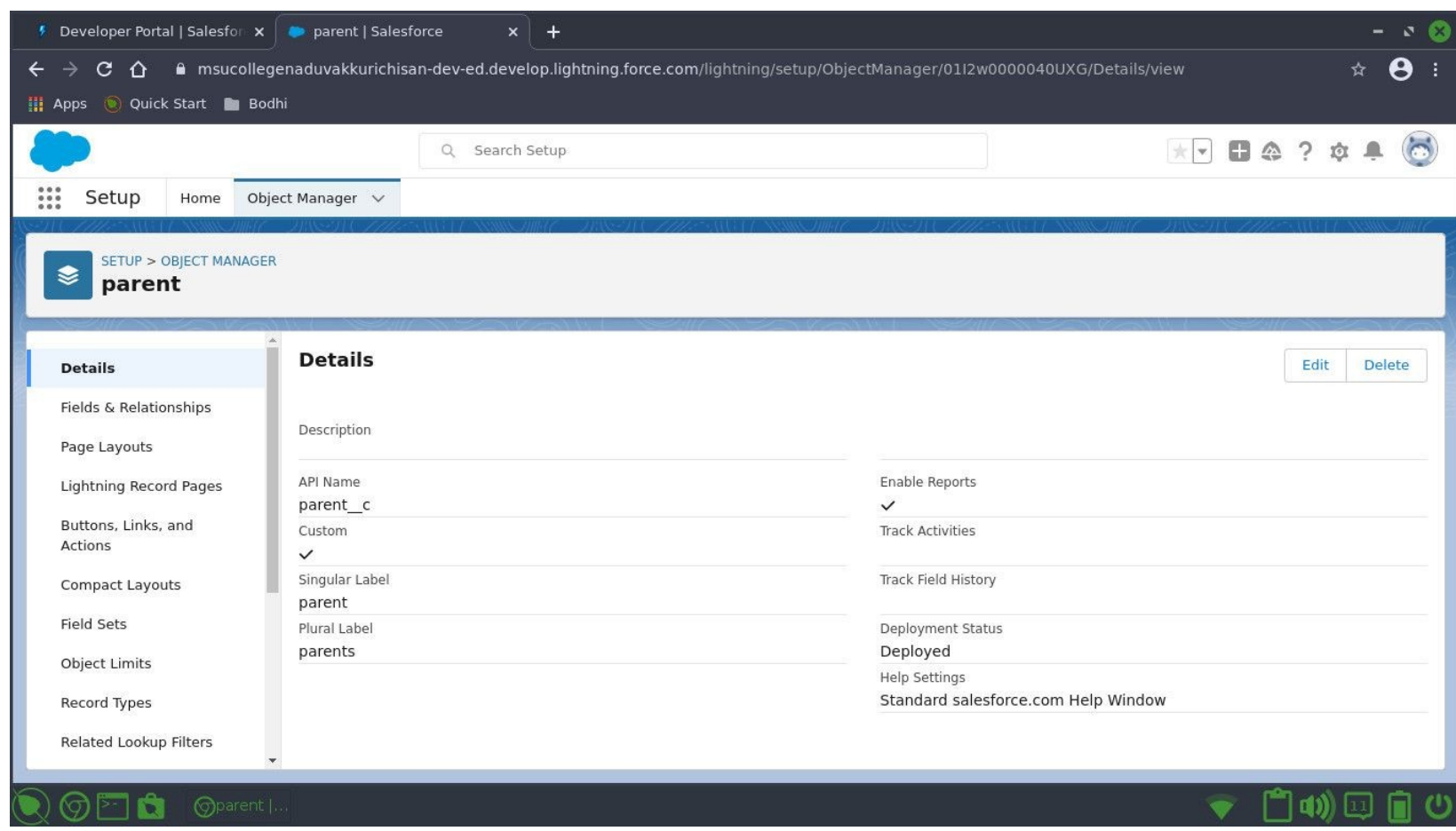
Object name	Fields in the object	
School	Field lable	Data type
	Address	Text area
	Number of students	Roll-up summary
	Highest Marks	Roll-up summary
	Phone number	Phone

Student	Field lable	Data type
	School	Master-Detail Relationships
	Results	Picklist
	Class	Number
Parent	Field lable	Datatype
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screeshot

- First we create School object
- Then create Student object and
- Create parent object
- Create School Management App
- Fields and Relationship
 - ✓ Creation of fields for the School objects
 - ✓ Creation of fields for the Student objects
 - ✓ Creation of fields for the Parent objects
- Creating a Users
- Permission sets
- Reports





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Recently Viewed | Schools

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Apps

Quick Start

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Schools

parents

Students

Reports

Dashboards

Search...

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Schools

Recently Viewed

0 items • Updated a few seconds ago

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Search this list...

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School Name

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You haven't viewed any Schools recently.
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Students | Salesforce

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Apps

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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

Fields & Relationships

10 Items, Sorted by Field Label

Q

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Enter Class	Enter_Class__c	Number(18, 0)		▼
enter Phone Number	enter_Phone_Number__c	Phone		▼
Enter Results	Enter_Results__c	Picklist		▼
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX School)		▼
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT School)		▼

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Setup

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Field Label	Field Name	Field Type	Relationship	Required
Enter Results	Enter_Results__c	Picklist		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX School)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT School)		
Owner	OwnerId	Lookup(User,Group)	✓	
School	School__c	Lookup(School)	✓	
Students Name	Name	Text(80)	✓	

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Object Manager | Salesforce

Users | Salesforce

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Setup

Home

Object Manager

👤 SETUP

Users

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector 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	C. ABI	AC	abi@limbo.msus		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rk5i8ead.fishdlbsi8yt@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	myparent_parent	pmypa	nchellaiva378@gmail.com		✓	enter school profile
<input type="checkbox"/> Edit	principal	prince	nchellaiva@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	techers_teacher	tech	nchellaiva37@gmail.com		✓	Identity User
<input type="checkbox"/> Edit	User Integration	inteq	integration@00d2w00000rk5i8ead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insiqhtssecurity@00d2w00000rk5i8ead.com		✓	Analytics Cloud Security User

New User

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Add Multiple Users

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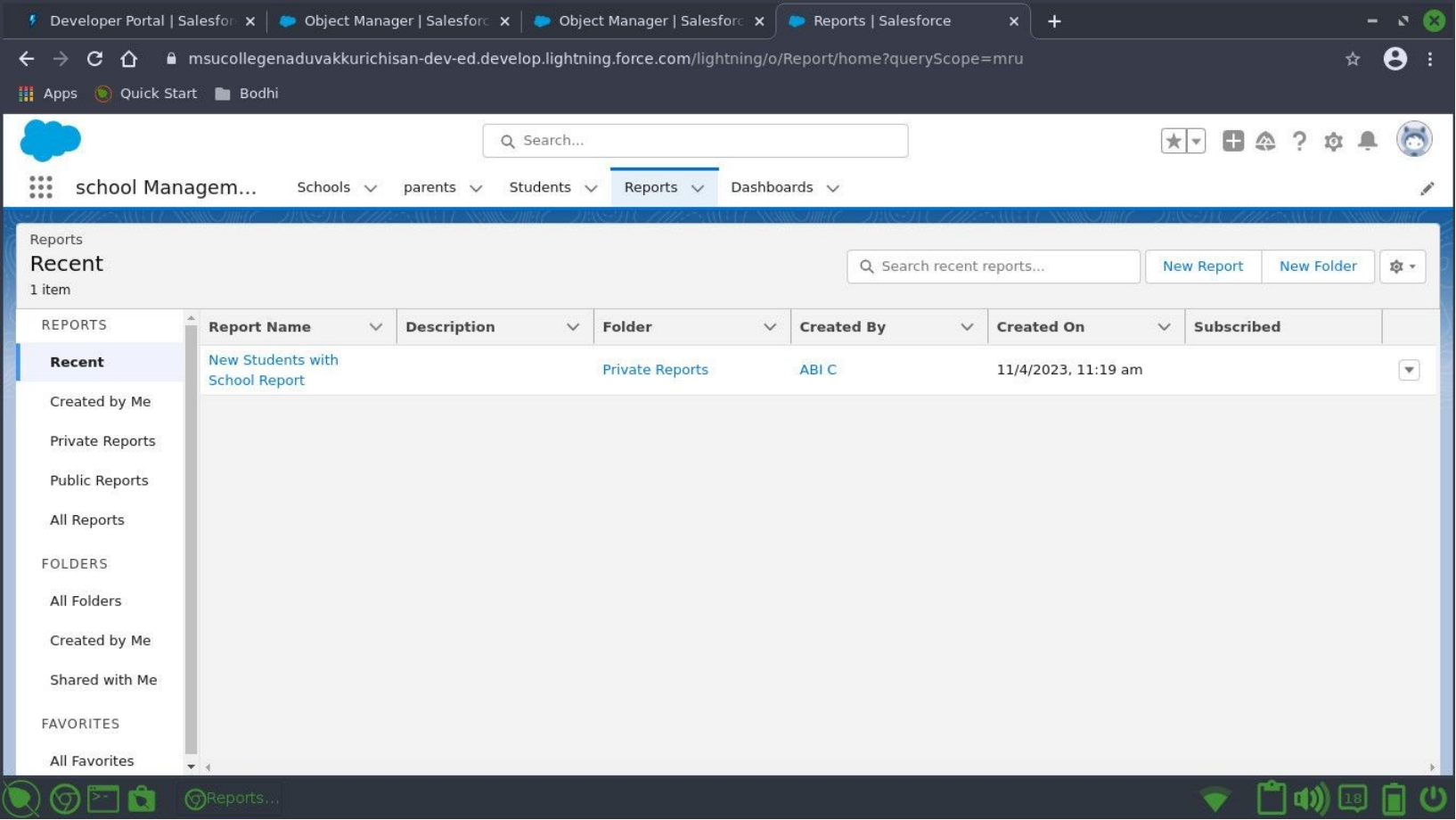
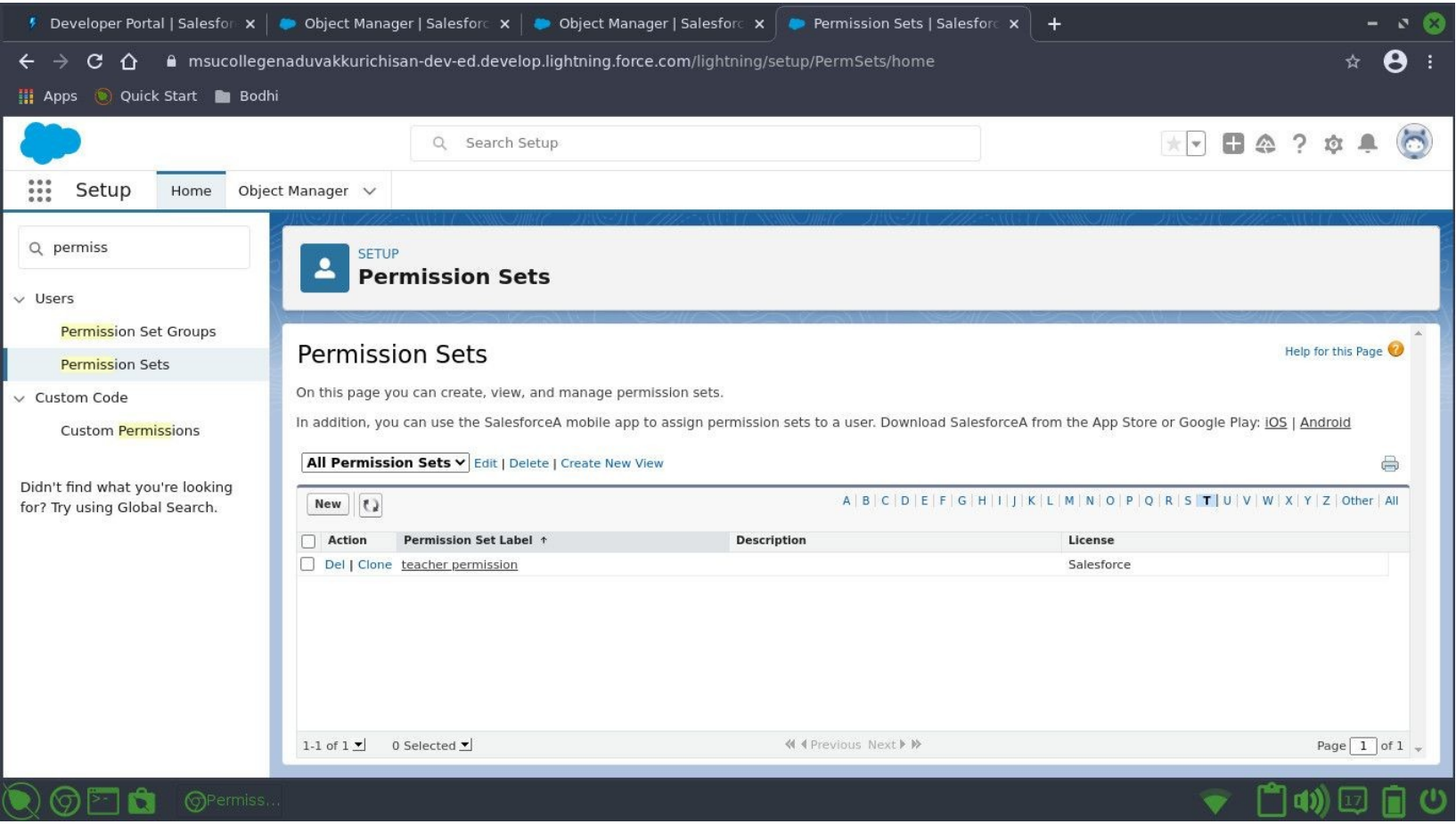
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4. TRAILHEAD PROFILE PUBLIC URL

Team Lead – <https://trailblazer.me/id/abictb>

Team Member 1 – <https://trailblazer.me/id/kaviv24>

Team Member 2 – <https://trailblazer.me/id/keerk50>

5. ADVANTAGES & DISADVANTAGES

Advantages:

- Improve Admissions and Enrolment details
- Improve Student Relationship with Institute
- Track Lead Sources
- Track the Courses, with most number of queries
- Easy tracking of student performance and attendance
- Maintain Course/University detail with fee structure

Disadvantages:

- In this method highly dependent on Internet connectivity. So it would be difficult to implement in schools and colleges in remote areas and times of bad connectivity.

6. APPLICATIONS

- A CRM applications for schools and colleges
- Improving interactions and communications
- Collection data of students

7. CONCLUSION

- We have learnt
- about what is Salesforce and CRM
- What are objects in salesforce
- What are fields and relationships in salesforce and how they can be used to establish relationships in and between objects.

8. FUTURE SCOPE

- Manage large amount of data over schools spread over large areas.