

<b>Date</b>	<b>20<sup>th</sup> April 2023</b>
<b>Team ID</b>	<b>NM2023TMID33417</b>
<b>Project Name</b>	<b>APPLICATION FOR SCHOOLS/COLLEGES</b>
<b>Team Leader</b>	<b>VALLI. R</b>
<b>Team Member</b>	<b>SUBASHINI. B</b>
	<b>THAISITHA. S</b>

## 1 INTRODUCTION

### Project Description

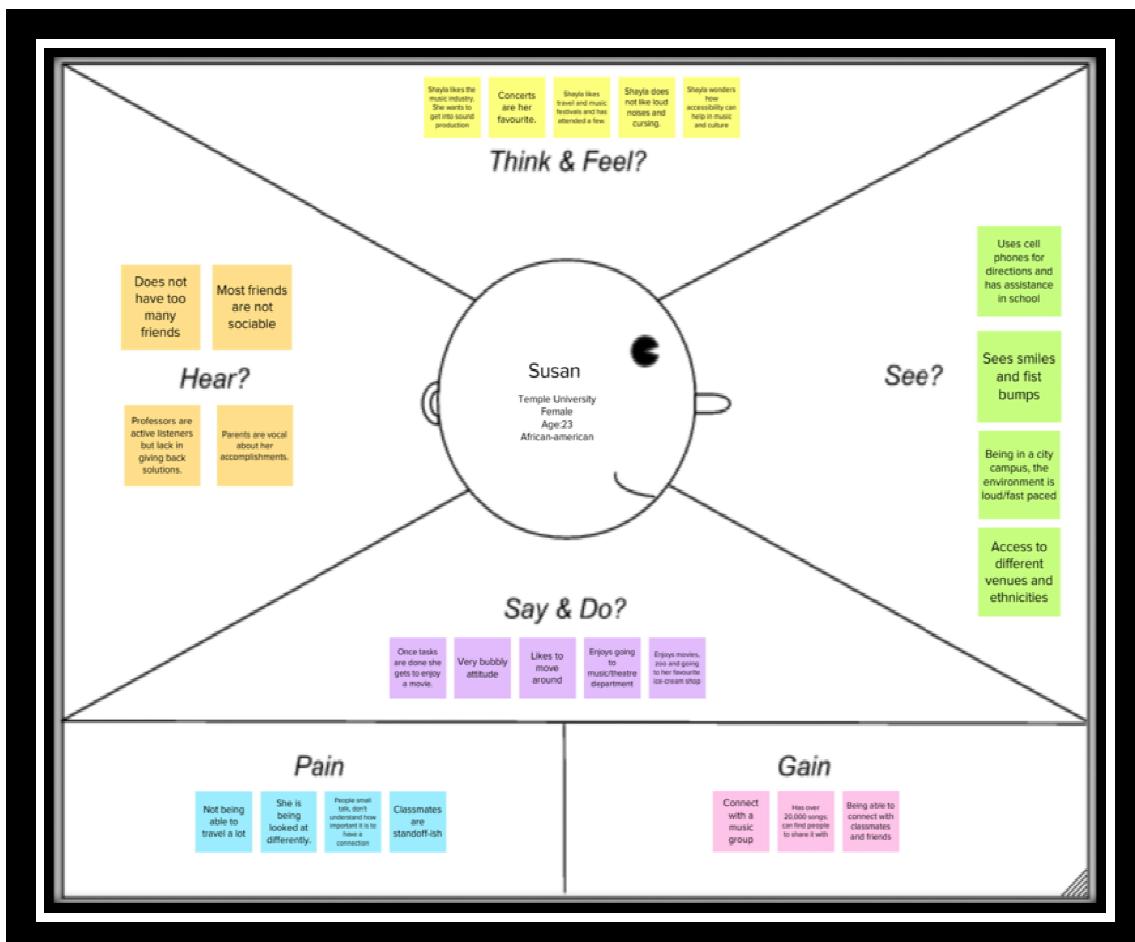
#### 1.1 Overview

Our project aim is to develop the customer relationship between School, students and parents by School Management App. We achieve this goal by creating custom objects, relationships, and page layouts that provide easy access to the relevant data.

#### 1.2 Purpose

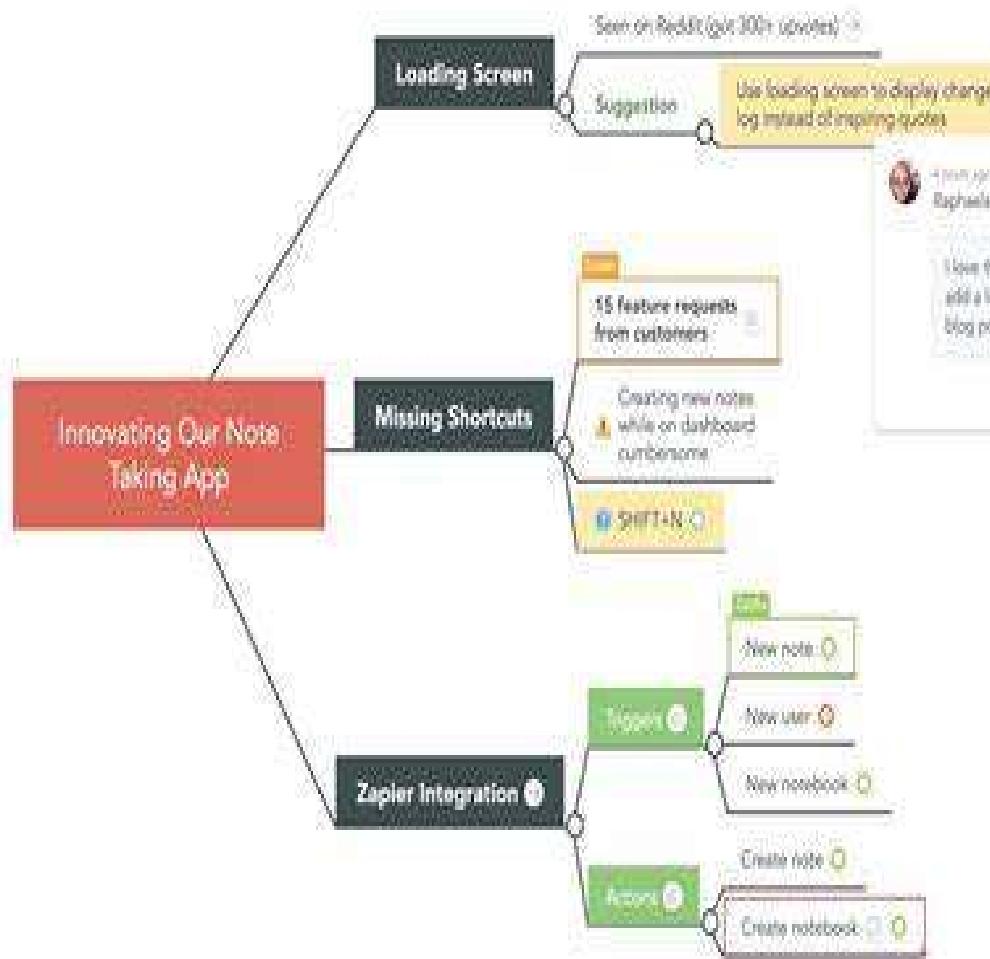
To enhance the efficiency of the app, we also establish custom objects and relationships that enable more streamlined storage and retrieval of data. Additionally, we install an unmanaged package within the organization to acquire metadata that supplements the existing data in the School Management App.

## 2 PROBLEM DEFINITION & DESING THINKING



# A CRM Application for Schools/Colleges

## 2.1 Ideation & Brainstorming Map



## 3 RESULT

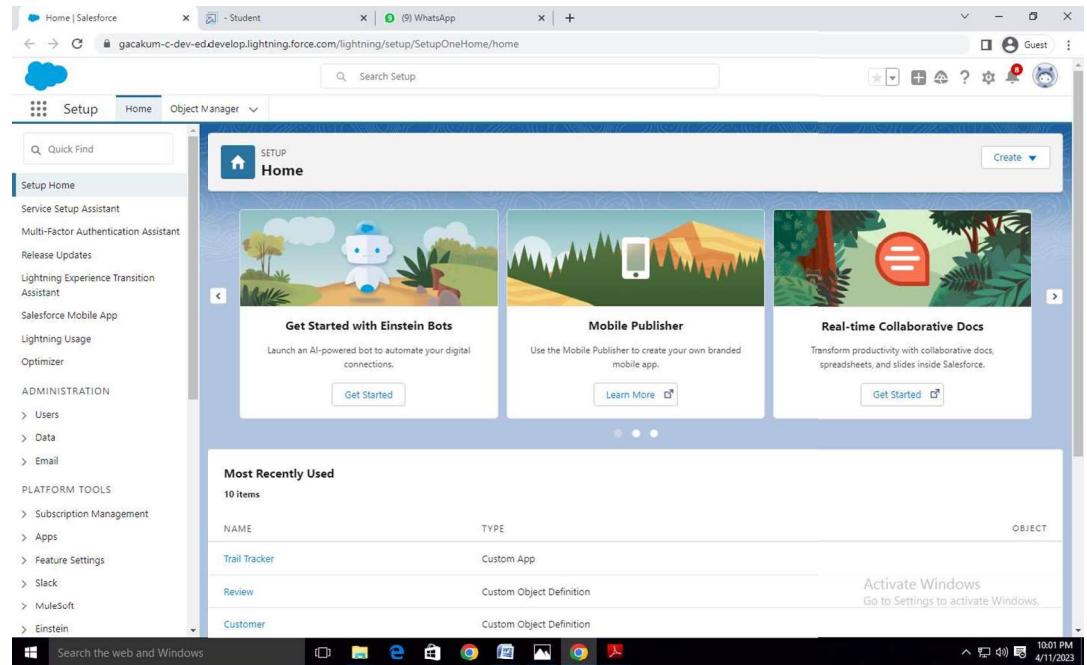
### 3.1 Data Model

Object Name	Fields in the Object	
	Field Label	Data Type
<b>School</b>	<b>Address</b>	<b>Text Area</b>
	<b>District</b>	<b>Text Area</b>
	<b>State and School</b>	<b>Text Area</b>
	<b>Phone Number</b>	<b>Phone</b>
	<b>Number of Students</b>	<b>Roll up Summary</b>
	<b>Highest Marks</b>	<b>Roll up Summary</b>
<b>Student</b>	<b>Phone Number</b>	<b>Phone</b>
	<b>School</b>	<b>Master-Detail Relationship</b>
	<b>Results</b>	<b>Picklist</b>
	<b>Class</b>	<b>Number</b>
<b>Parent</b>	<b>Parent Address</b>	<b>Text Area</b>
	<b>Parent Number</b>	<b>Phone</b>

# A CRM Application for Schools/Colleges

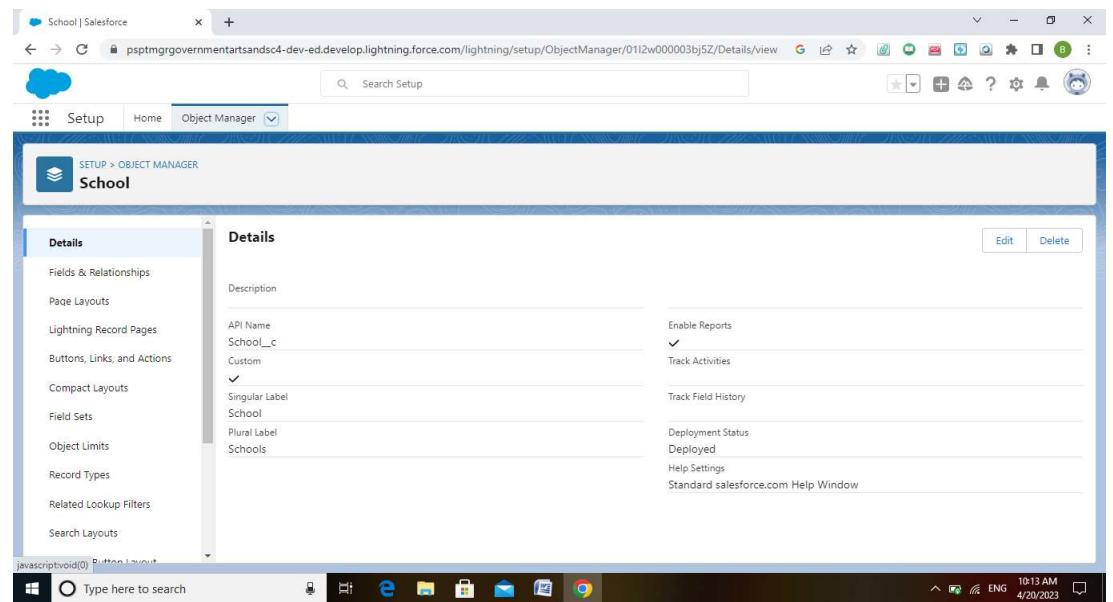
## 3.2 Activity & Screenshot

### Milestone 1:

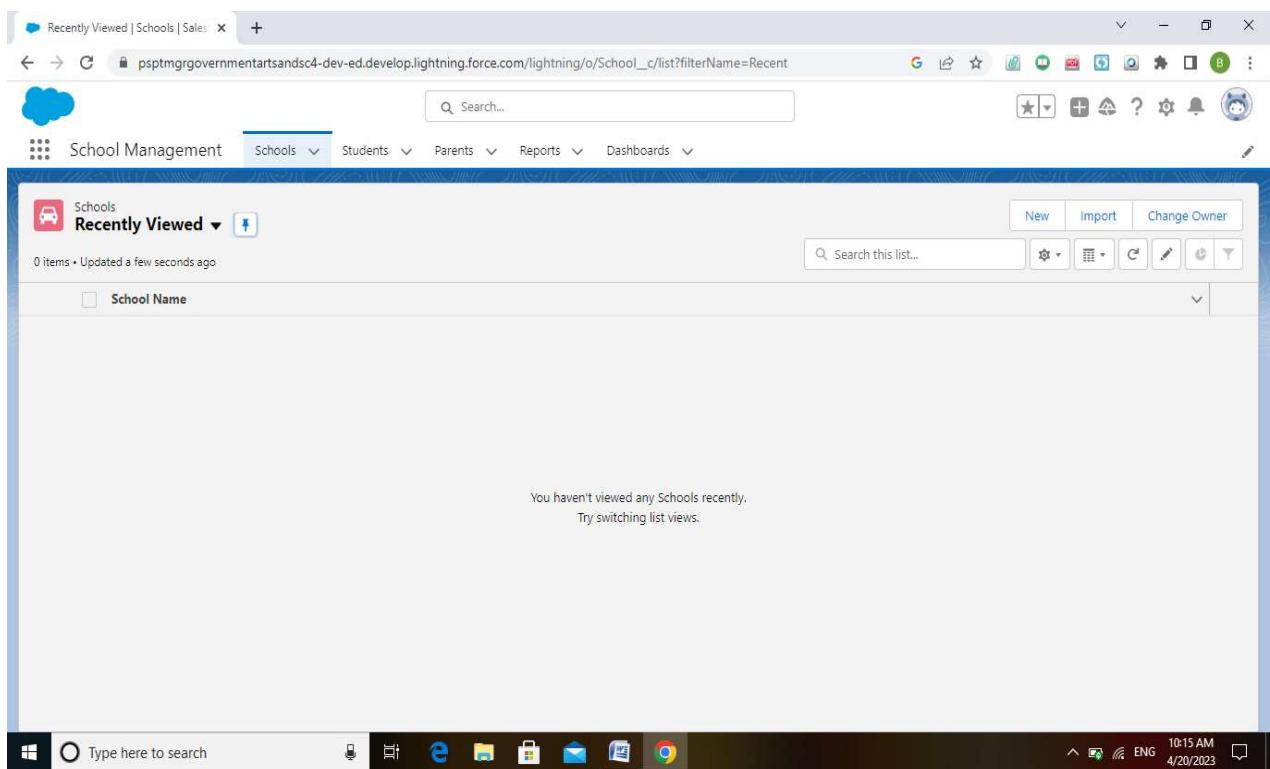


### Creation of Salesforce Account.

### Milestone :2

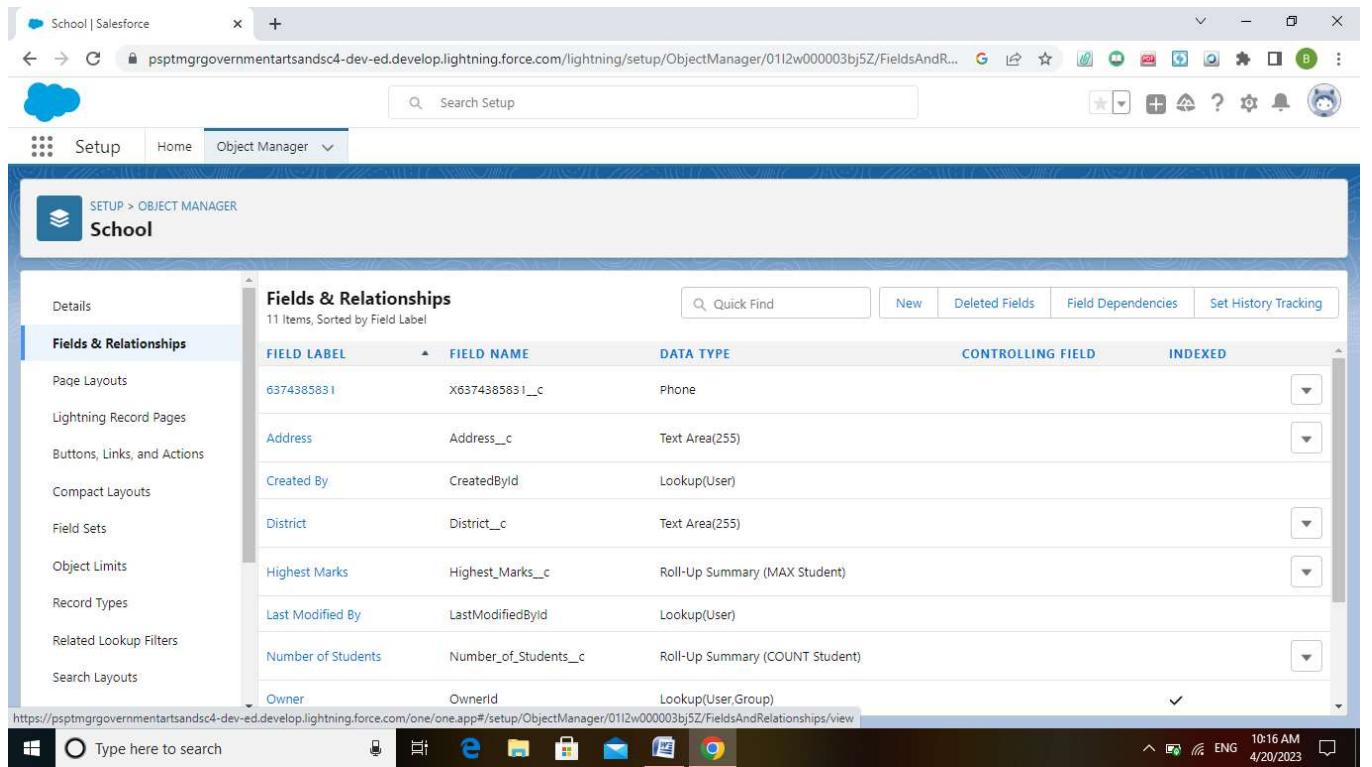


### Creating Object for School Student and Parent

**Milestone 3:**

**Creation of lightening app for School Management**

## Milestone 4 :

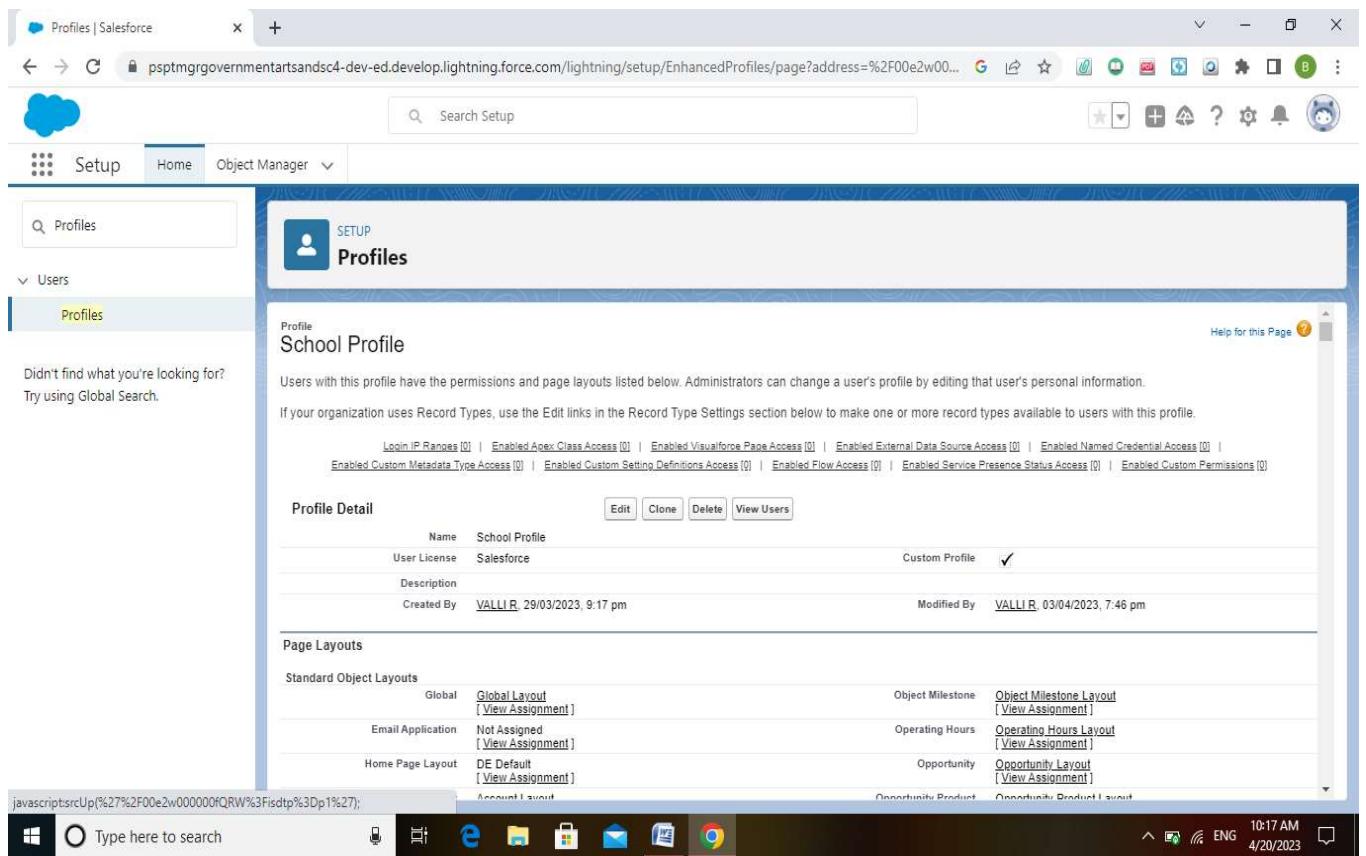


The screenshot shows the Salesforce Object Manager interface for the 'School' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area displays the 'Fields & Relationships' section with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
6374385831	X6374385831__c	Phone		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
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)		
Owner	OwnerId	Lookup(User,Group)		

**Creation of field and Relationship for the objects school, students and parents.**

## Milestone 5:



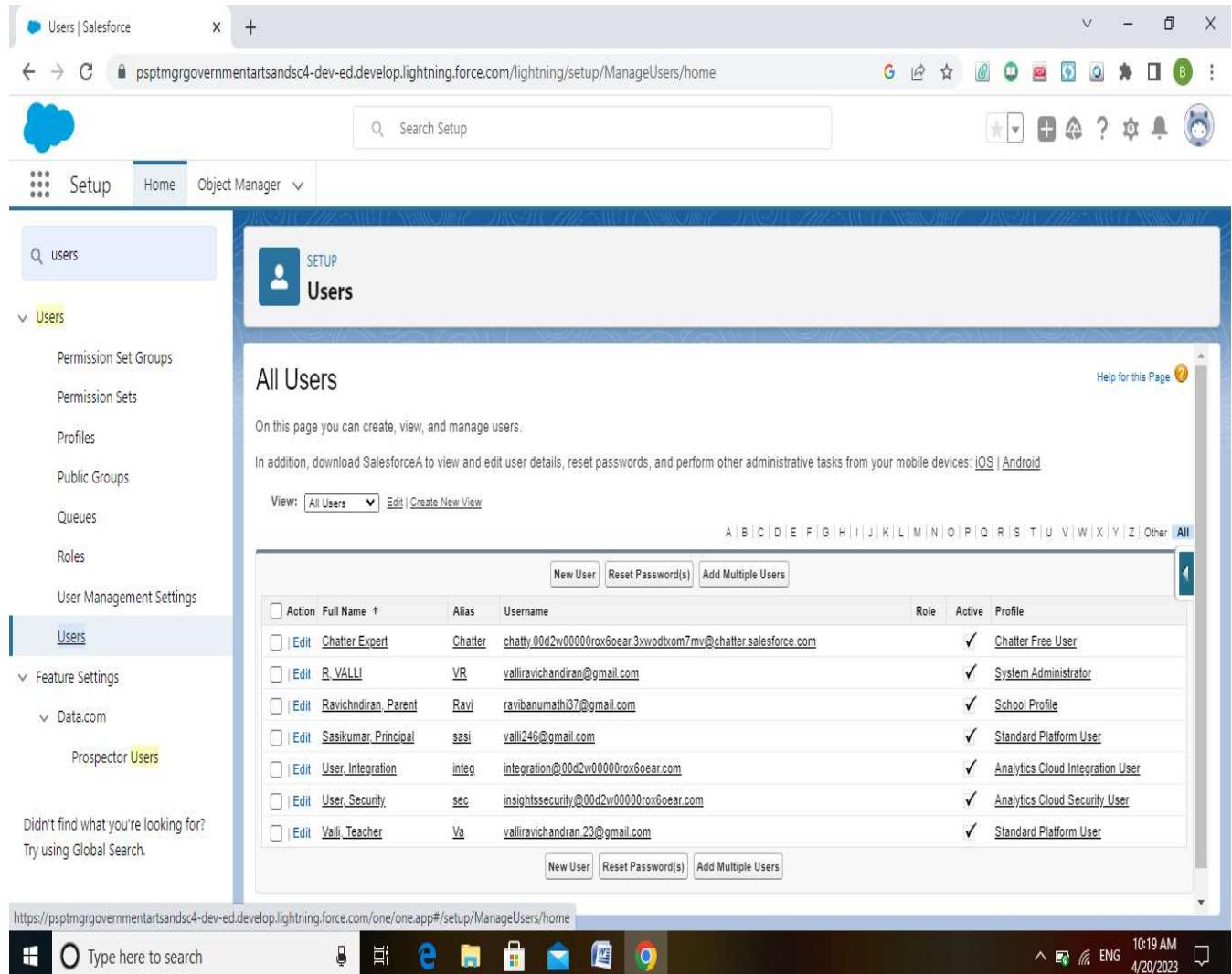
The screenshot shows the Salesforce Setup interface for creating a new profile. The page title is "Profiles | Salesforce". The left sidebar shows "Profiles" under "Users". The main content area is titled "Profiles" and "School Profile". It displays the profile details: Name (School Profile), User License (Salesforce), Description (empty), Created By (VALLI R., 29/03/2023, 9:17 pm), Modified By (VALLI R., 03/04/2023, 7:46 pm). Below this, the "Page Layouts" section lists standard object layouts for various objects like Global, Email Application, Home Page Layout, Object Milestone, Operating Hours, Opportunity, and Opportunity Product.

Profile Detail	
Name	School Profile
User License	Salesforce
Description	
Created By	VALLI R., 29/03/2023, 9:17 pm
Modified By	VALLI R., 03/04/2023, 7:46 pm

Page Layouts	
Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	DE Default [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Opportunity	Opportunity Layout [View Assignment]
Opportunity Product	Opportunity Product Layout [View Assignment]

**Creation on profile for school**

## Milestone 6:



The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar shows navigation options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' option is selected. The main content area displays a table of users with the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_00d2w00000rox6oeair3xwodtxom7mv@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	R_VALLI	VR	valliravichandiran@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	Ravichndiran_Parent	Ravi	ravibanumathi37@gmail.com		<input checked="" type="checkbox"/>	School Profile
<a href="#">Edit</a>	Sasikumar_Principal	sasi	valli246@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<a href="#">Edit</a>	User_Integration	integ	integration@00d2w00000rox6oeair.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00d2w00000rox6oeair.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<a href="#">Edit</a>	Valli_Teacher	Va	valliravichandran_23@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User

Creating users for Teachers, Principal and Parents

# A CRM Application for Schools/Colleges



## Milestone 7:

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Users, Feature Settings, Data.com, and Prospectors. The main content area is titled 'Permission Sets' and shows a 'teacher permission' record. The 'Permission Set Overview' section displays the following details:

Description	API Name	Namespace Prefix
teacher permission	teacher_permission	
License		
Session Activation Required	<input type="checkbox"/>	
Last Modified By	VALLI R	30/03/2023, 8:42 pm

The 'Apps' section lists several settings:

- 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.

**Creating permission set for teacher permission and principal permission**

# A CRM Application for Schools/Colleges



## Milestone 8:

A screenshot of a web browser window displaying the Salesforce Reports interface. The URL in the address bar is [psptmrgovernmentartsandsc4-dev-ed-develop.lightning.force.com/lightning/o/Report/home?queryScope=mru](https://psptmrgovernmentartsandsc4-dev-ed-develop.lightning.force.com/lightning/o/Report/home?queryScope=mru).

The page title is "Reports | Salesforce". The top navigation bar includes links for "School Management", "Schools", "Students", "Parents", "Reports" (which is currently selected), and "Dashboards". A search bar at the top right contains the placeholder "Search...". Below the navigation is a "Recent" section with a table showing two recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Parents Report		Private Reports	VALLI R	1/4/2023, 7:05 pm	
Created by Me	New Schools with Students Report		Private Reports	VALLI R	1/4/2023, 7:04 pm	

On the left side, there is a sidebar with categories: "REPORTS" (Recent, Created by Me, Private Reports, Public Reports, All Reports), "FOLDERS" (All Folders, Created by Me, Shared with Me), and "FAVORITES" (All Favorites). The status bar at the bottom shows "Waiting for psptmrgovernmentartsandsc4-dev-ed-develop.lightning.force.com...". The taskbar at the bottom of the screen includes icons for File, Task View, Edge, File Explorer, Mail, Photos, OneDrive, and Google Chrome, along with system status indicators like battery level, signal strength, and date/time (10:20 AM, 4/20/2023).

Creating report for school with students and parents

## 4 TRAILHEAD PROFILE PUBLIC URL

Team Lead - <https://trailblazer.me/id/vallr2>

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

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

## 5 ADVANTAGES & DISADVANTAGES

- ✓ It is useful for manage school records.
- ✓ It is handle by all the persons of the Institution.
- ✓ Less expenses for creating this app.
- ✓ It is not a popular in all countries.

## 6 APPLICATIONS

- ✓ It used in all schools for managing records about student and their parents.
- ✓ It helps to pick a more data about the student..
- ✓ Mostly it is used for a big schools.

## 7 CONCULUSION

- ✓ To enhance the efficiency of the app.

## 8 FUTURE SCOPE

In the 21<sup>st</sup> century each and every field is computerized and all works are done by using the modern technologies so it has a good future.