

Project Report Template

1 INTRODUCTION:

1.1 Overview

A CRM APPLICATION FOR SCHOOLS / COLLEGES Creating salesforce developer account is the first step of project activity and create username and password is mainly to enter salesforce.com. Creation of an application for school management we need to create three objects it's school object, student object and parent object all the milestones are made based on this three objects. Totally 8 milestones are given. Create salesforce developer account, object, lightning app, fields and relationship, profile, users, permission sets , reports. Each milestones are each activity is related to other milestones. Salesforce objects are database tables that permit you to store data that is specific to an organization. Apps in salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo , and a particular set of tabs. The simplest app usually has just two tabs. A two way association between two objects.they can also see and access related data. A group/collection of settings and permissions that define what a users can do in salesforce. Anyone who logs in to salesforce.users are employees at yours company,such salesreps, managers, and IT specialist, every users in Salesforce has a user account, a permission set is a collection of settings and permission that give users access to various tools and function permission sets extend users functional access without changing their profiles. A list of records the meet theb criteria you define.

1.2 Purpose

A CRM APPLICATION FOR SCHOOLS/COLLEGS System using salesforce is a learning and management related project. The project aim is to provide real time knowledge for all 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.

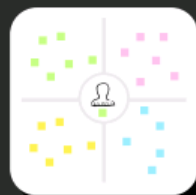
2 Problem Definition & Design Thinking

2.1 Empathy Map

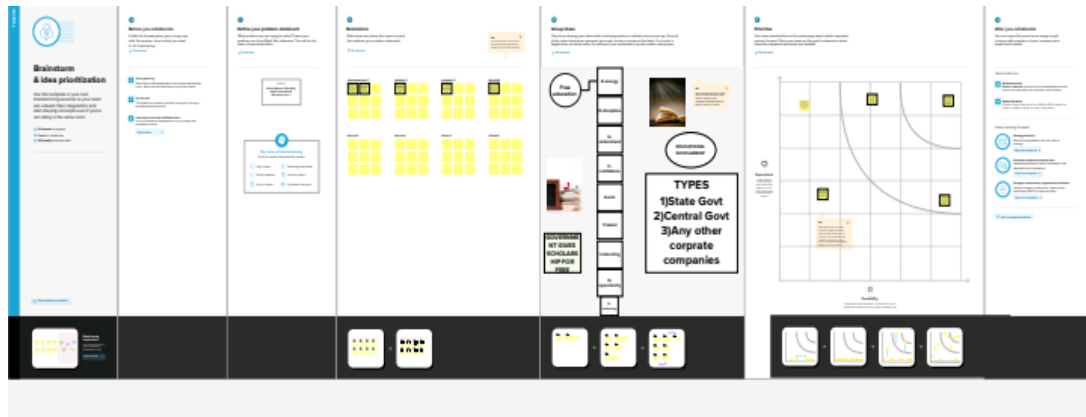


Build empathy

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



2.2 Ideation & Brainstorming Map



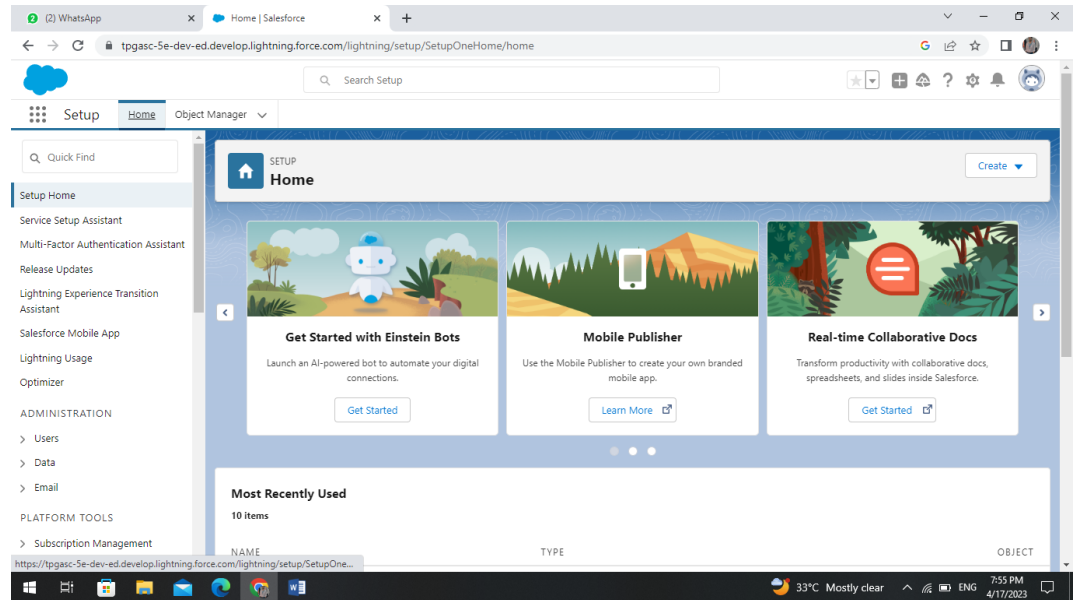
3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
School	Field label	Data type
	Address	Text Area
	District	Text Area
	State	Text Area
	School	Text Area
	Phone Number	Phone
	Number of student	Roll-up summary
	Highest Marks	Roll-up summary
Student	Field label	Data type
	Phone Number	Phone
	Master-Detail Relationship	School
	Results	Picklist
	Class	Number
	Marks	Number
Parent	Field label	Data type
	Parent Adress	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

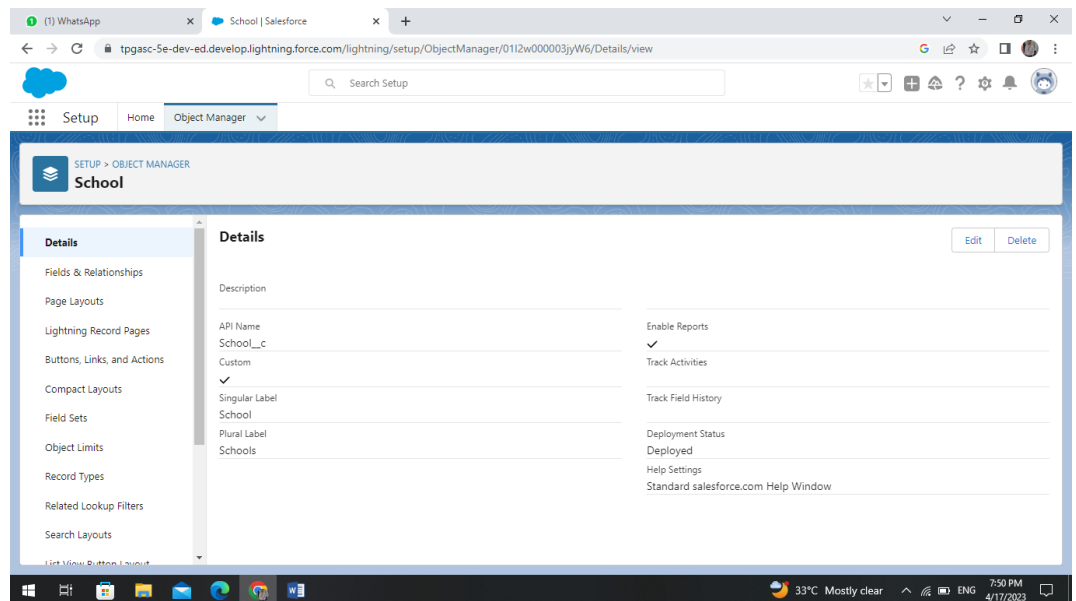
Activity – 1: Create of salesforce developer account



Description:

- Website link : developers.salesforce.com sign up
- Sign up you salesforce Edition and login
- Salesforce.com

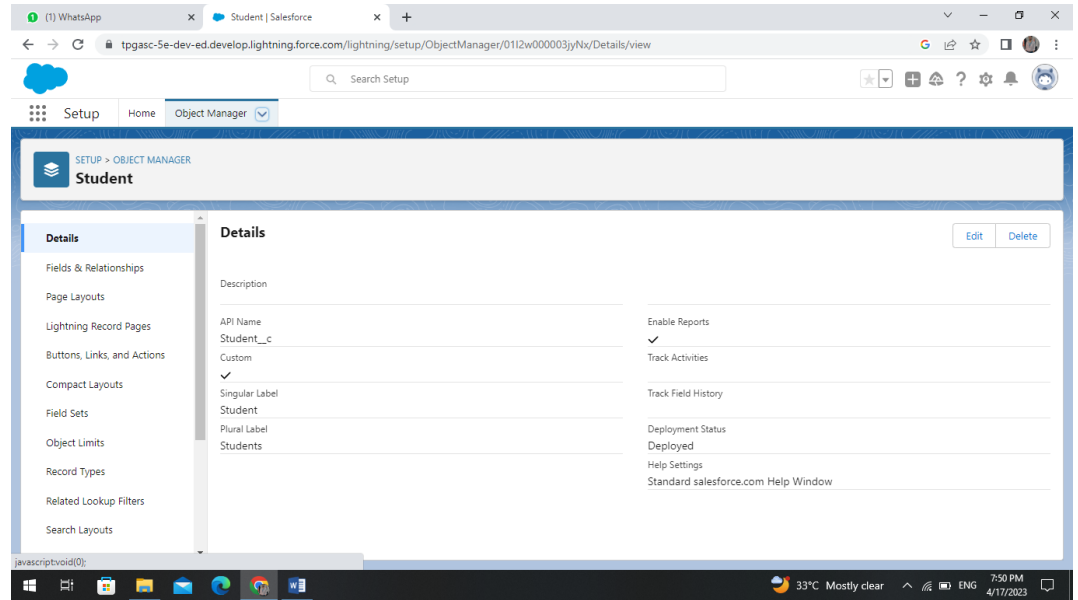
Activity – 2: Creation of School Object



Description:

- Create the Object enter label, Plural label, Record name, allow search.
- Create Custom tab object, custom style, icon,

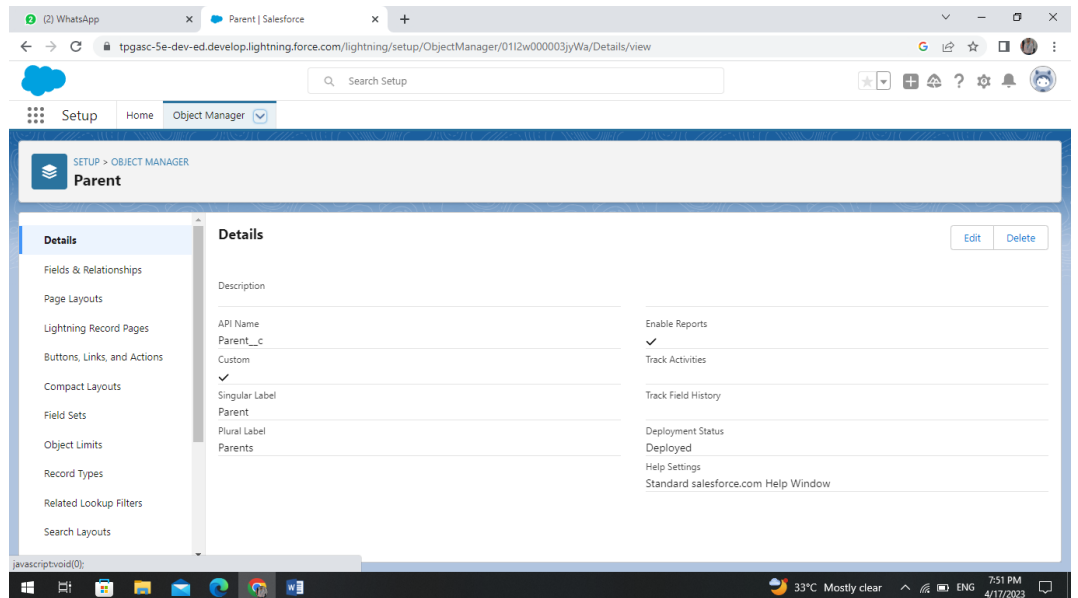
Activity – 3: Create Student Object



Description:

- Create the Object enter label, Plural label, Record name, allow search
- Create Custom tab object, custom style, icon,

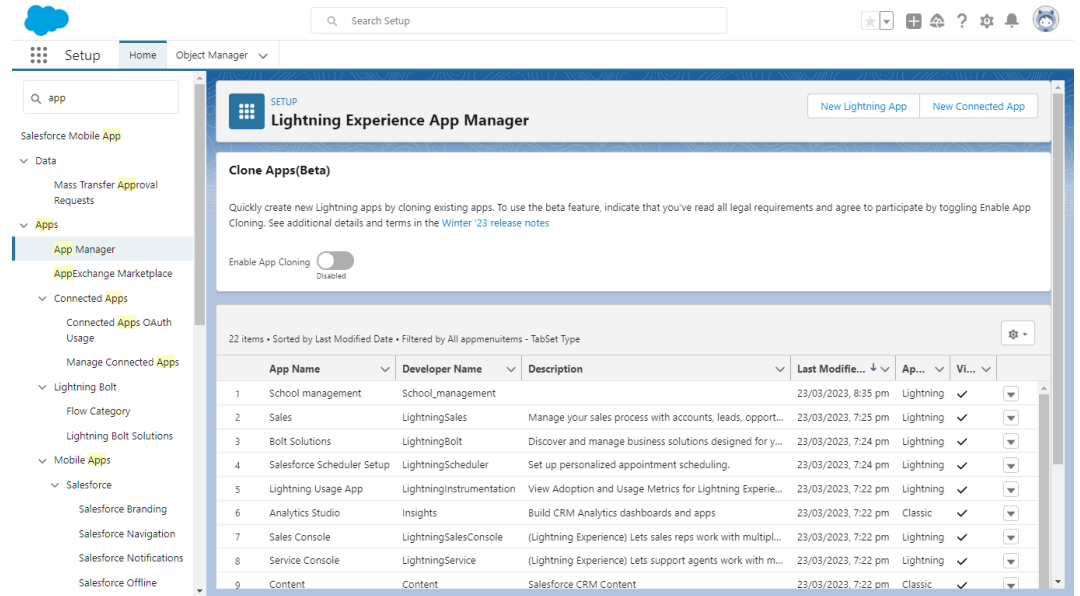
Activity – 4: Create Parent Object



Description:

- Create the Object enter label, Plural label, Record name, allow search
- Create Custom tab object, custom style, icon,

Activity – 5 : Created School Management app in APP Manager



Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

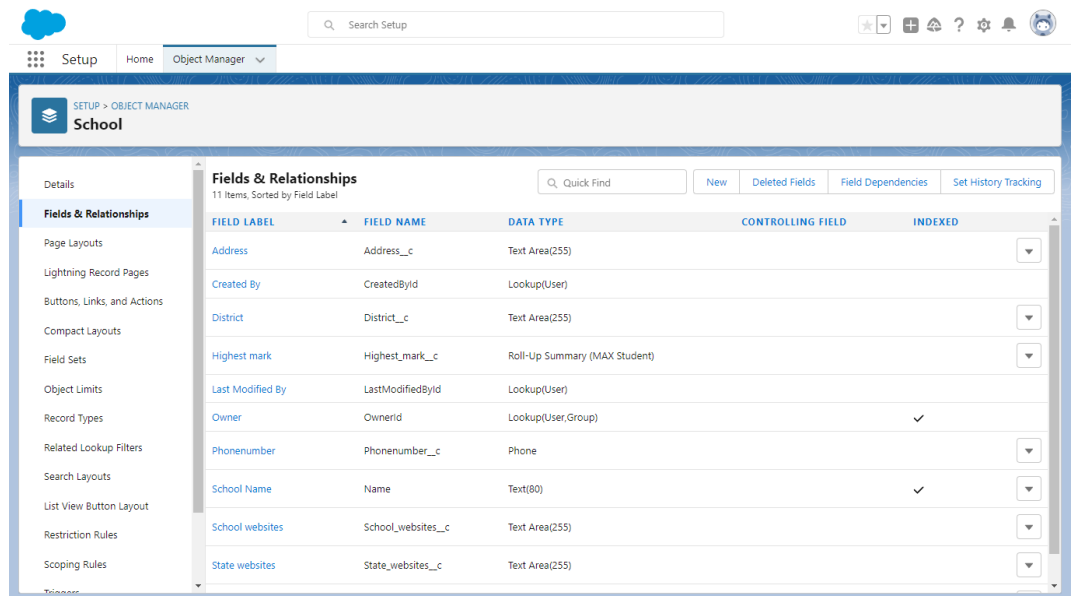
Enable App Cloning ☐ Disabled

App Name	Developer Name	Description	Last Modified	App Type	Visibility
1 School management	School_management		23/03/2023, 8:35 pm	Lightning	✓
2 Sales	LightningSales	Manage your sales process with accounts, leads, opport...	23/03/2023, 7:25 pm	Lightning	✓
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for y...	23/03/2023, 7:24 pm	Lightning	✓
4 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	23/03/2023, 7:24 pm	Lightning	✓
5 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experie...	23/03/2023, 7:22 pm	Lightning	✓
6 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	23/03/2023, 7:22 pm	Classic	✓
7 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multipl...	23/03/2023, 7:22 pm	Lightning	✓
8 Service Console	LightningService	(Lightning Experience) Lets support agents work with m...	23/03/2023, 7:22 pm	Lightning	✓
9 Content	Content	Salesforce CRM Content	23/03/2023, 7:22 pm	Classic	✓

Description:

- Enter app manager new lightning app, utility items, Available Profiles

Activity – 6: Creation of fields for the School Objects



Fields & Relationships

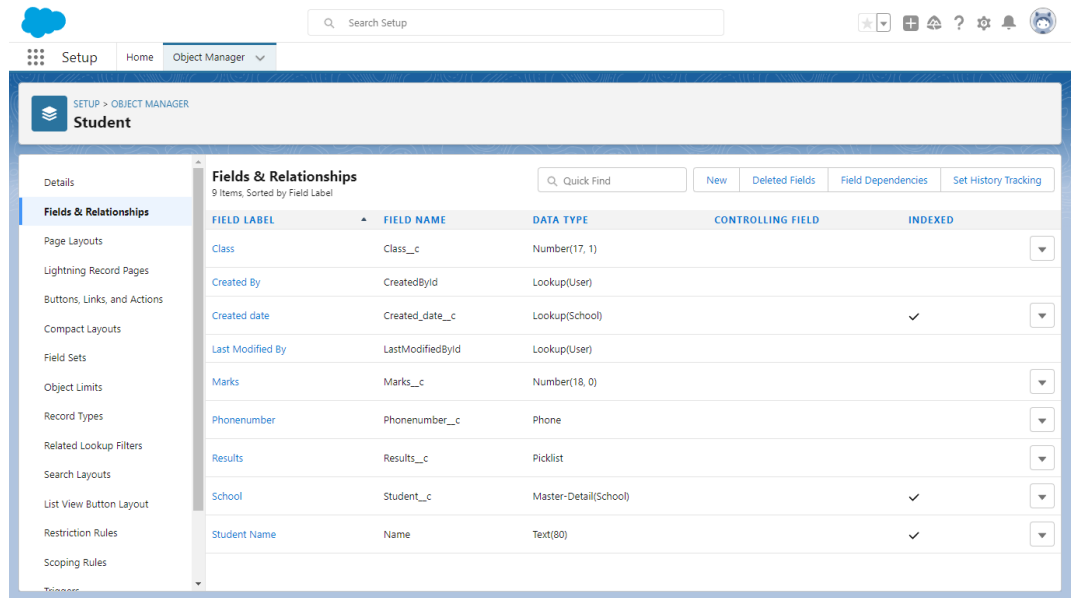
11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest mark	Highest_mark__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phonenumber	Phonenumber__c	Phone		
School Name	Name	Text(80)		✓
School websites	School_websites__c	Text Area(255)		
State websites	State_websites__c	Text Area(255)		

Description:

- Object manager tab , Field and relationships
- Custom field Textarea, Data type, Field label and Two more Text areas

Activity – 7: Creation of fields for the Student Objects



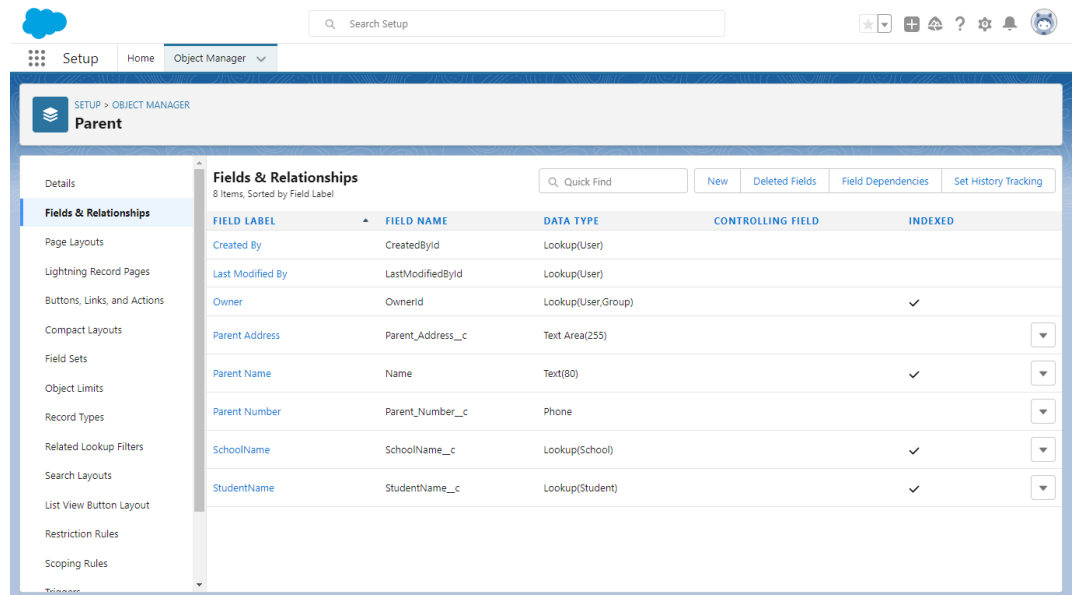
The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' tab is selected, displaying a list of 9 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(17, 1)		
Created By	CreatedById	Lookup(User)		
Created date	Created_date__c	Lookup(School)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phonenumber	Phonenumber__c	Phone		
Results	Results__c	Picklist		
School	Student__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Description:

- Data type, Field label, masterdetail relationships
- Pick-list field and Number field

Activity – 8: Creation of fields for the Parent Objects



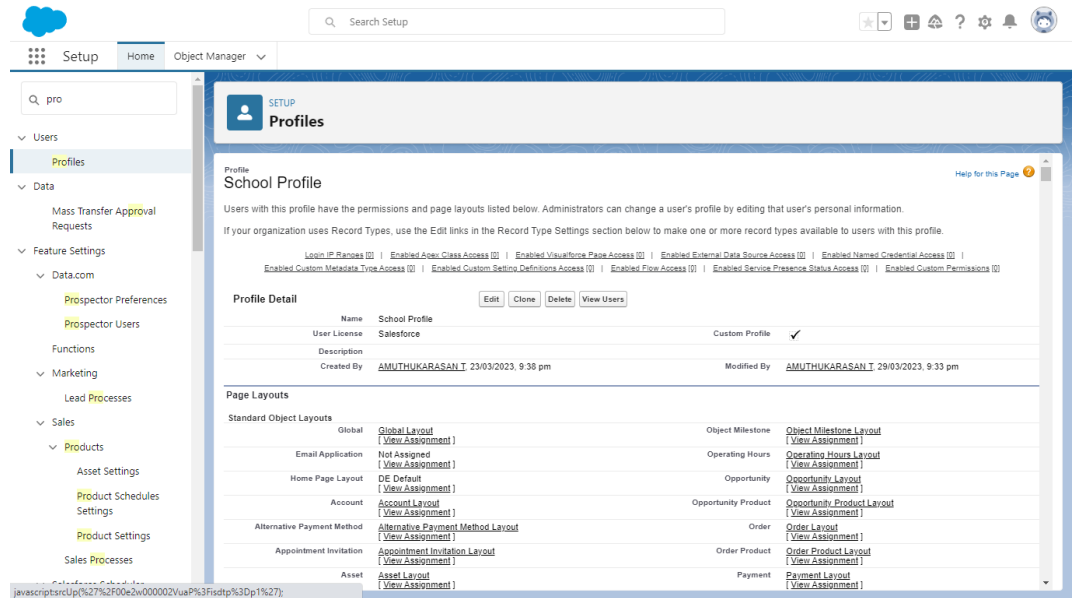
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' tab is selected, displaying a list of 8 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

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 Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		
SchoolName	SchoolName__c	Lookup(School)		✓
StudentName	StudentName__c	Lookup(Student)		✓

Description:

- Test area, Data type and field label

Activity – 9: Creation On Profiles



The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected in the left sidebar. The main content area displays the 'School Profile' configuration. The profile is named 'School Profile' and is associated with the 'Salesforce' user license. The 'Custom Profile' checkbox is checked. The 'Created By' field shows 'AMUTHUKARASANT' on '23/03/2023, 9:38 pm' and the 'Modified By' field shows 'AMUTHUKARASANT' on '29/03/2023, 9:33 pm'.

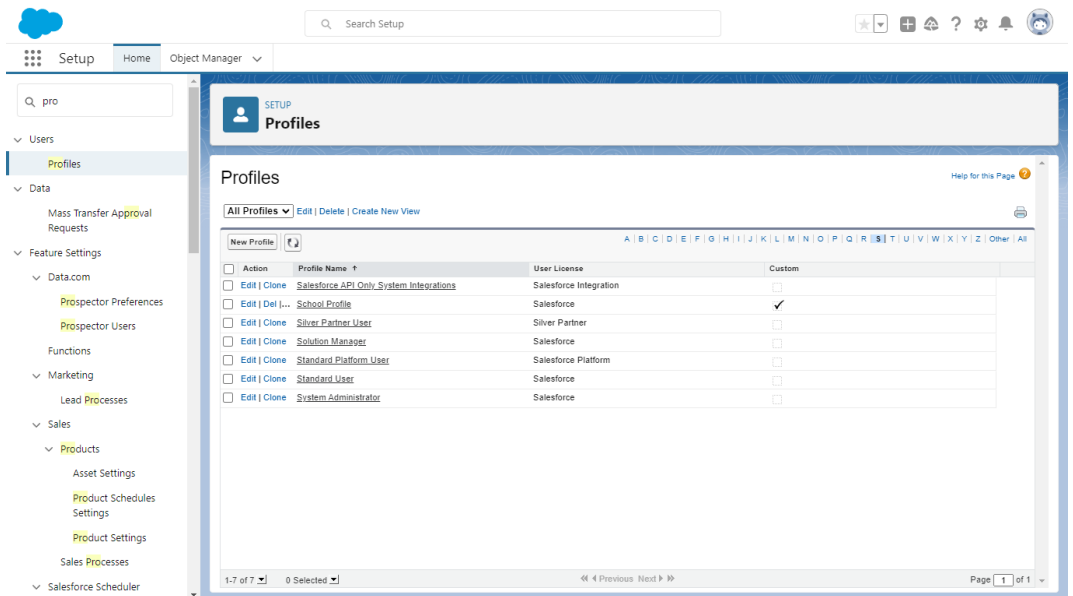
Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout (View Assignment)	Object Milestone Layout (View Assignment)
Home Page Layout	Not Assigned (View Assignment)	Operating Hours (View Assignment)
Account	DE Default (View Assignment)	Opportunity (View Assignment)
Alternative Payment Method	Account Layout (View Assignment)	Opportunity Product (View Assignment)
Appointment Invitation	Alternative Payment Method Layout (View Assignment)	Order (View Assignment)
Asset	Appointment Invitation Layout (View Assignment)	Order Product (View Assignment)
	Asset Layout (View Assignment)	Payment (View Assignment)

Description:

- Enter Profile

Activity – 10: School Profile



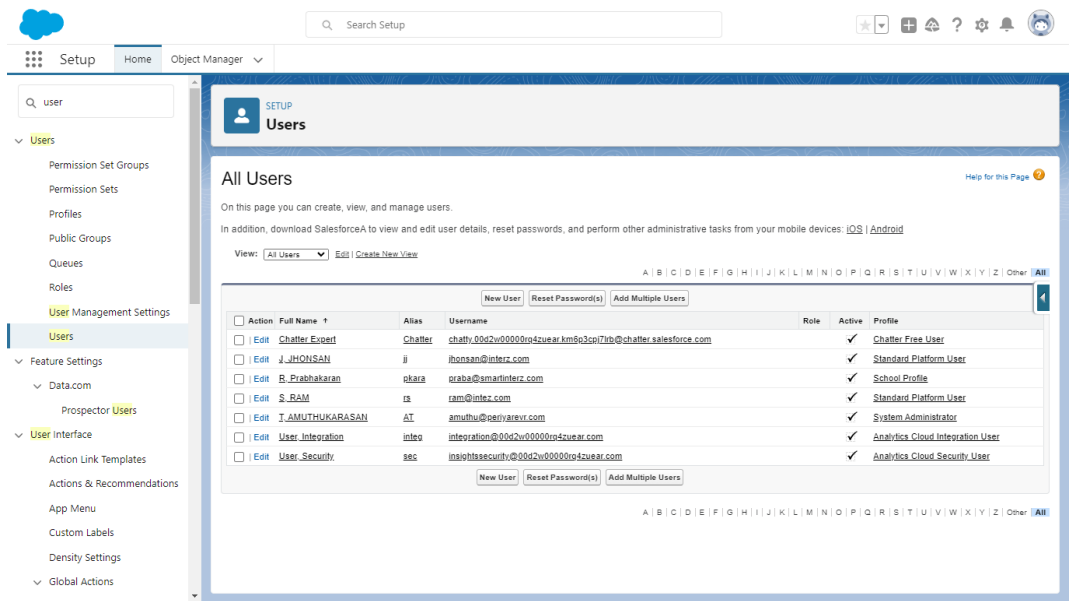
The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected in the left sidebar. The main content area displays a list of profiles. The 'School Profile' is highlighted with a checkmark in the 'Custom' column.

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Delete New	School Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

Description:

- Enter Profile, profile name, object permission

Activity – 11: Creation On Users



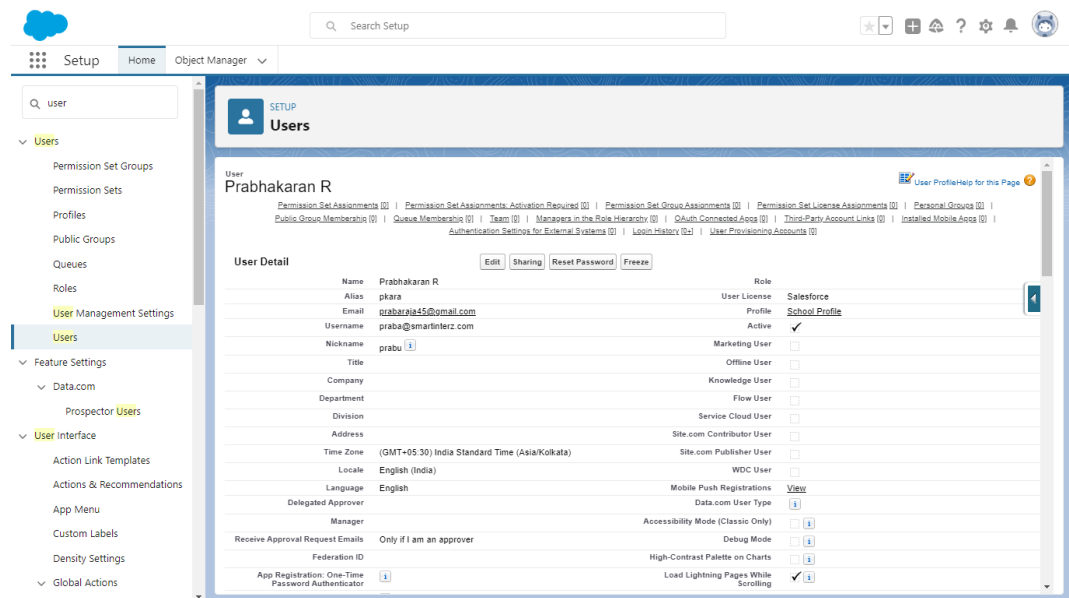
The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The 'All Users' page displays a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d2w00000n4zuear.km9p3cn77b@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	J. HONSAH	ji	jbonzan@interz.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	B. Prabhakaran	pkara	praba@smartinternz.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	S. RAM	ra	ram@interz.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	T. AMUTHIUKARASAN	AT	amuthu@interz.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000n4zuear.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	ssc	insightsecurity@00d2w00000n4zuear.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Description:

- Enter Users and New user

Activity – 12: Creation On Parents (Prabhakaran) Users



The screenshot shows the 'User Detail' page for a user named Prabhakaran R. The page includes a header with navigation links and a 'User Profile' section. Below this is a 'User Detail' section with a table of user information and a 'User License' section with a table of license details.

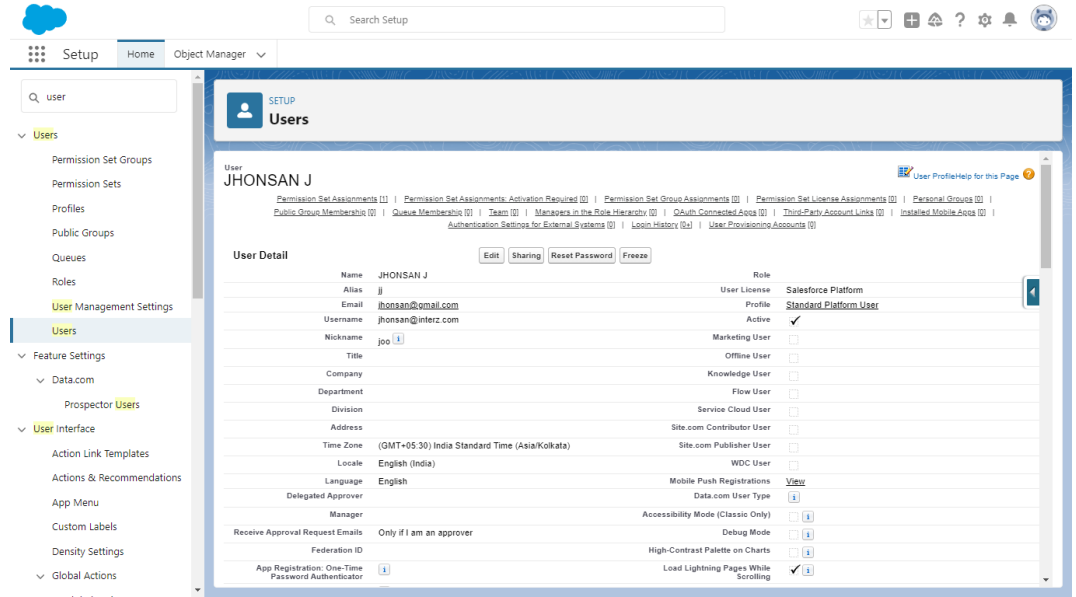
Name	Alias	Role	User License
Prabhakaran R	pkara	Salesforce	School Profile

Field	Value	Field	Value
Username	praba@smartinternz.com	Active	<input checked="" type="checkbox"/>
Nickname	prabu	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

Description:

- Enter Users and New user, User name , Users License, Profile

Activity – 13: Creation On Teachers (JHONSAN) Users

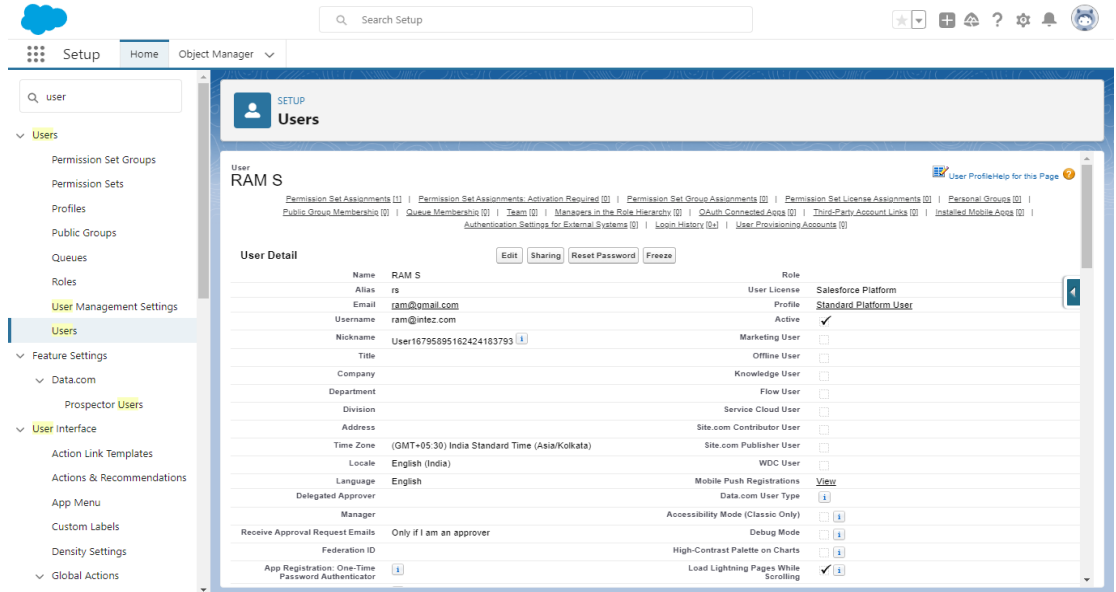


The screenshot shows the 'Users' management page in the Smart Internz Setup interface. The user 'JHONSAN J' is selected, and the 'User Detail' section is expanded. The user's role is 'Salesforce Platform' and their profile is 'Standard Platform User'. The user is active, and their nickname is 'joo'. The user's email is 'jhonsan@interz.com' and their username is 'jhonsan@interz.com'. The user's title is 'Marketing User'. The user's company is 'Interz.com'. The user's department is 'Marketing'. The user's division is 'Marketing'. The user's address is 'Interz.com'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's delegated approver is 'Manager'. The user's manager is 'Manager'. The user's receive approval request emails is 'Only if I am an approver'. The user's federation ID is 'Federation ID'. The user's app registration one-time password authenticator is 'App Registration: One-Time Password Authenticator'. The user's accessibility mode is 'Accessibility Mode (Classic Only)'. The user's debug mode is 'Debug Mode'. The user's high-contrast palette on charts is 'High-Contrast Palette on Charts'. The user's load lightning pages while scrolling is 'Load Lightning Pages While Scrolling'.

Description:

- Enter Users and New user, User name , Users License, Profile

Activity – 14: Creation On Principals (RAM) Users

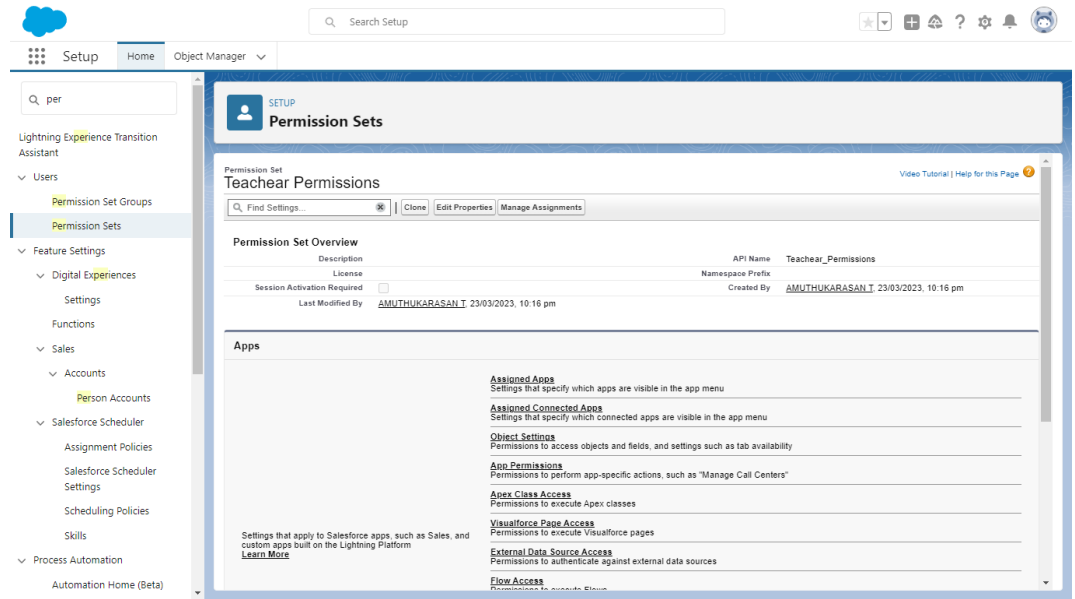


The screenshot shows the 'Users' management page in the Smart Internz Setup interface. The user 'RAM S' is selected, and the 'User Detail' section is expanded. The user's role is 'Salesforce Platform' and their profile is 'Standard Platform User'. The user is active, and their nickname is 'User16795095162424183793'. The user's title is 'Marketing User'. The user's company is 'Interz.com'. The user's department is 'Marketing'. The user's division is 'Marketing'. The user's address is 'Interz.com'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's delegated approver is 'Manager'. The user's manager is 'Manager'. The user's receive approval request emails is 'Only if I am an approver'. The user's federation ID is 'Federation ID'. The user's app registration one-time password authenticator is 'App Registration: One-Time Password Authenticator'. The user's accessibility mode is 'Accessibility Mode (Classic Only)'. The user's debug mode is 'Debug Mode'. The user's high-contrast palette on charts is 'High-Contrast Palette on Charts'. The user's load lightning pages while scrolling is 'Load Lightning Pages While Scrolling'.

Description:

- Enter Users and New user, User name , Users License, Profile.

Activity – 15: Teachear Permission Sets



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. The 'Teachear Permissions' permission set is displayed. The 'Permission Set Overview' section shows the following details:

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	AMUTHUKARASAN T. 23/03/2023, 10:16 pm
API Name	Teachear_Permissions
Namespace Prefix	
Created By	AMUTHUKARASAN T. 23/03/2023, 10:16 pm

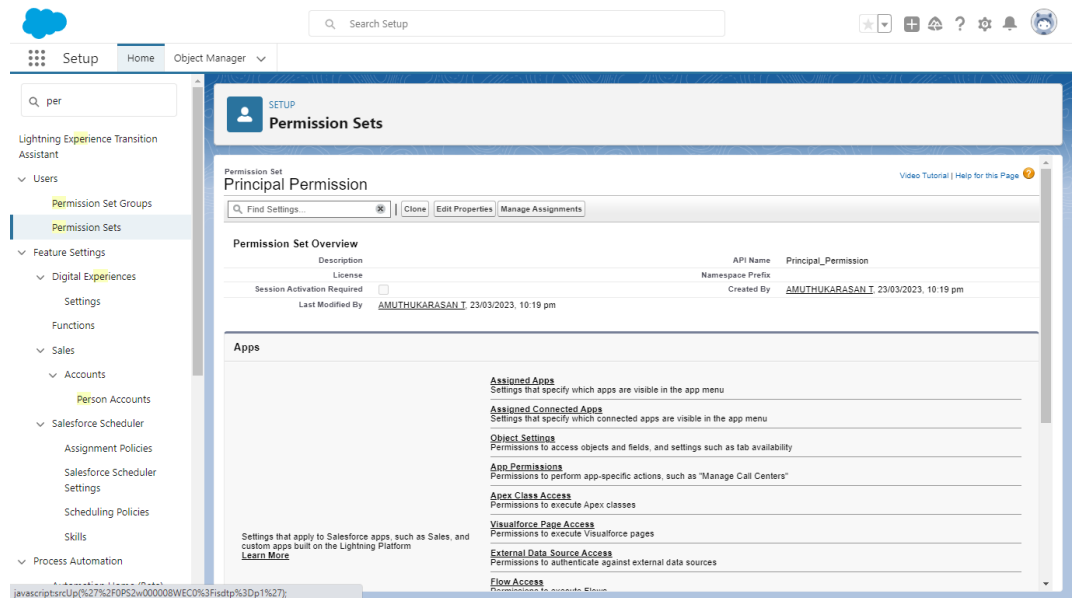
The 'Apps' section lists various permission categories:

- 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.
- Flow Access:** Permissions to execute flows.

Description:

- Enter Permission sets , Permission sets name and custom object to Assign

Activity – 16: Principal Permission Sets



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. The 'Principal Permission' permission set is displayed. The 'Permission Set Overview' section shows the following details:

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	AMUTHUKARASAN T. 23/03/2023, 10:19 pm
API Name	Principal_Permission
Namespace Prefix	
Created By	AMUTHUKARASAN T. 23/03/2023, 10:19 pm

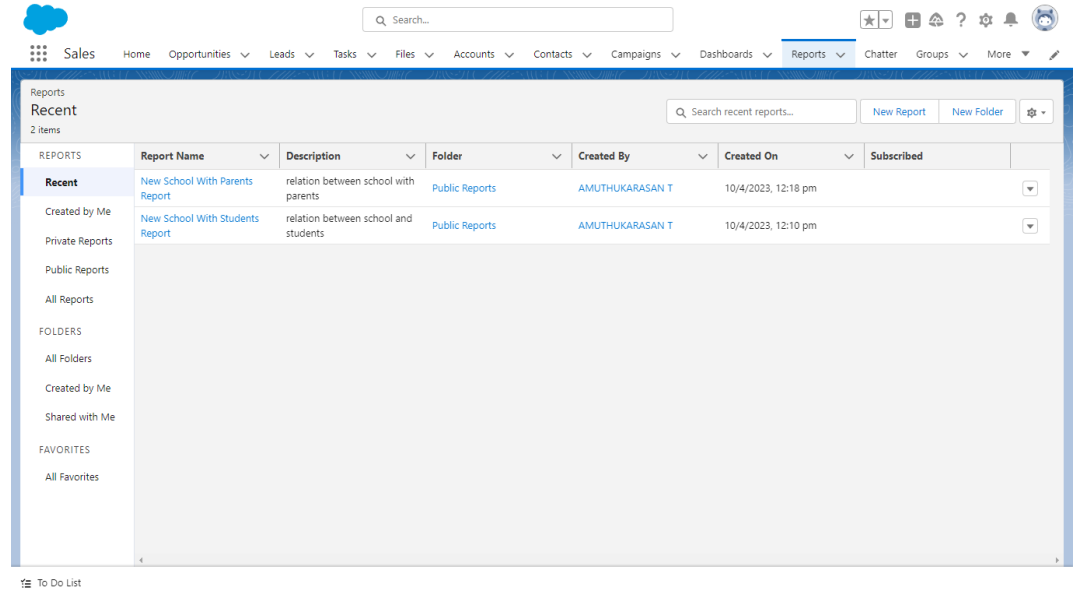
The 'Apps' section lists various permission categories:

- 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.
- Flow Access:** Permissions to execute flows.

Description:

- Enter Permission sets , Permission sets name and custom object to Assign

Activity – 17: Reports



The screenshot shows the 'Reports' section of the Smart Internz application. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports' (selected), 'Chatter', 'Groups', and 'More'. The 'Reports' section has a search bar and buttons for 'New Report' and 'New Folder'. The 'Recent' reports list shows two items:

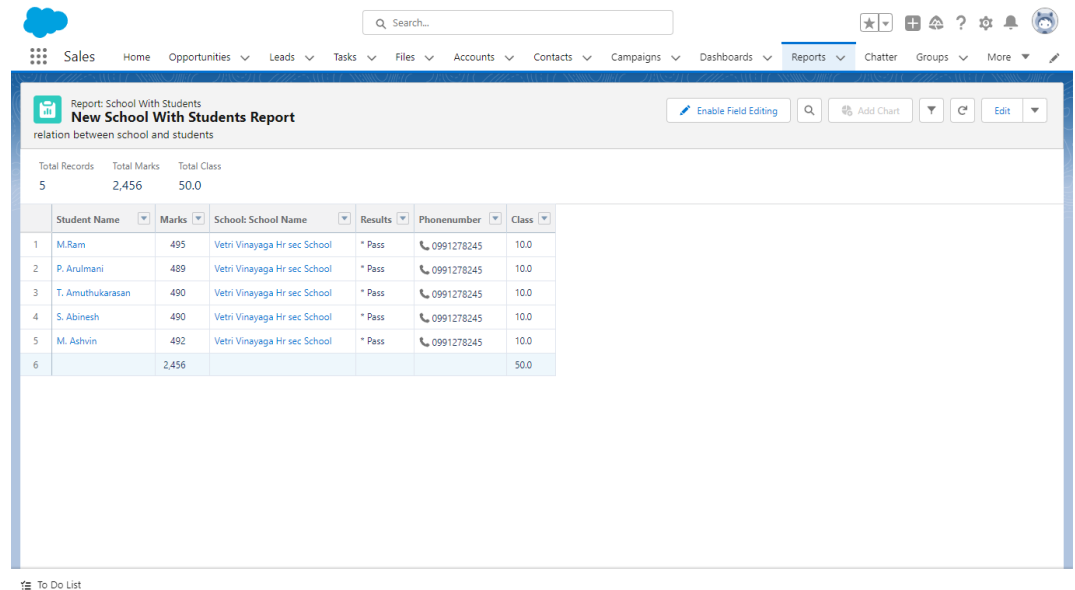
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New School With Parents Report	relation between school with parents	Public Reports	AMUTHUKARASAN T	10/4/2023, 12:18 pm	
Created by Me	New School With Students Report	relation between school and students	Public Reports	AMUTHUKARASAN T	10/4/2023, 12:10 pm	

Below the reports list, there are sections for 'FOLDERS' (All Folders, Created by Me, Shared with Me) and 'FAVORITES' (All Favorites).

Description:

- Report tab
- Folders can be public

Activity – 18 : School With Students Report



The screenshot shows the 'New School With Students Report' interface. The top navigation bar is the same as in the previous screenshot. The report title is 'New School With Students Report' with the subtitle 'relation between school and students'. There are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The report displays summary statistics:

Total Records	Total Marks	Total Class
5	2,456	50.0

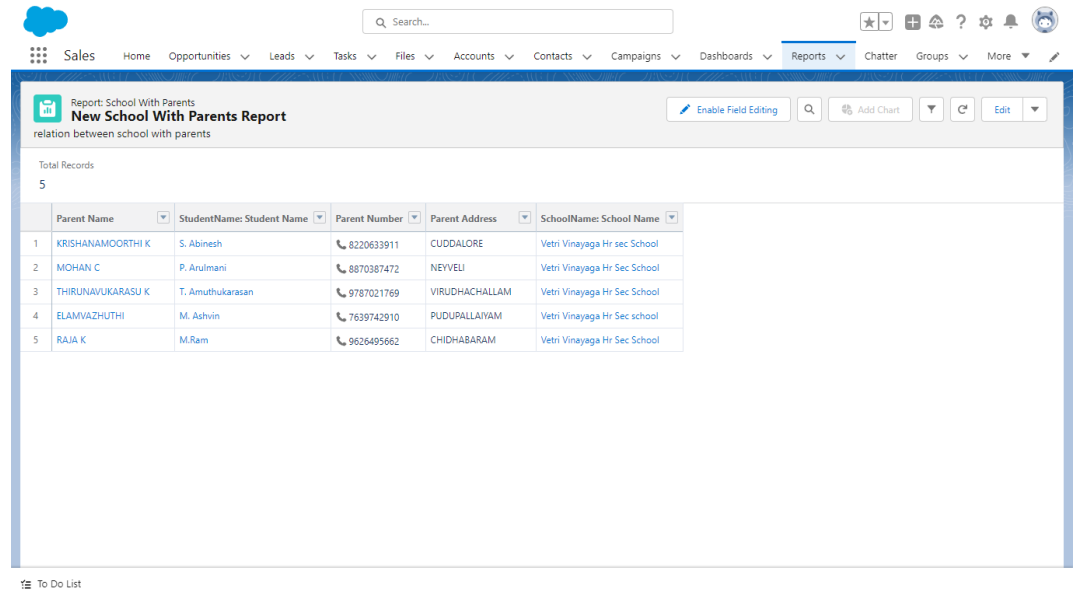
Below the summary, there is a table with columns: Student Name, Marks, School: School Name, Results, Phonenummer, and Class.

	Student Name	Marks	School: School Name	Results	Phonenummer	Class
1	M.Ram	495	Vetri Vinayaga Hr sec School	* Pass	0991278245	10.0
2	P. Arulmani	489	Vetri Vinayaga Hr sec School	* Pass	0991278245	10.0
3	T. Amuthukarasan	490	Vetri Vinayaga Hr sec School	* Pass	0991278245	10.0
4	S. Abinash	490	Vetri Vinayaga Hr sec School	* Pass	0991278245	10.0
5	M. Ashvin	492	Vetri Vinayaga Hr sec School	* Pass	0991278245	10.0
6		2,456				50.0

Description:

- Report type , report name and customize report

Activity – 19: School With Parents Report



The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. A search bar is also present. Below the navigation bar, the report title is 'New School With Parents Report' with a subtitle 'relation between school with parents'. There are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The report shows 5 total records. Below this, a table displays the data for each record.

	Parent Name	StudentName: Student Name	Parent Number	Parent Address	SchoolName: School Name
1	KRISHANAMOORTHY K	S. Abineth	8220633911	CUDDALORE	Vetri Vinayaga Hr sec School
2	MOHAN C	P. Arulmani	8870387472	NEYVELU	Vetri Vinayaga Hr Sec School
3	THIRUNAVUKARASU K	T. Amuthukarasan	9787021769	VIRUDHACHALLAM	Vetri Vinayaga Hr Sec School
4	ELAMVAZHUTHI	M. Ashvin	7639742910	PUDUPALLAYAM	Vetri Vinayaga Hr Sec school
5	RAJA K	M.Ram	9626495662	CHIDHABARAM	Vetri Vinayaga Hr Sec School

Description:

- Report type , report name and customize report

4 Trailhead Profile Public URL

- Team Lead - <https://trailblazer.me/id/abins35>
- Team Member 1 - <https://trailblazer.me/id/amutt22>
- Team Member 2 - <https://trailblazer.me/id/arulp15>
- Team Member 3 - <https://trailblazer.me/id/ashvm4>

5 ADVANTAGES & DISADVANTAGES

ADVANTAGES:

- Trustworthy reporting.
- Dashboards that visually showcase data.
- Improved messaging with automation.
- Proactive service.
- Efficiency enhanced by automation.
- Simplified collaboration.

DISADVANTAGES:

- CRM costs. One of the greatest challenges to CRM implementation is cost. ...
- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. ...
- Poor communication. ...
- Lack of leadership.

6 APPLICATIONS

- Operational CRM systems. Operational CRM are designed to help execute sales, marketing, and customer service functions. ...
- Analytical CRM systems. ...
- Collaborative CRM systems. ...
- Strategic CRM systems.

7 CONCLUSION

- End the essay on a positive note.
- Communicate the importance of your ideas and the subject matter.
- Provide the reader with a sense of closure.
- Reiterate and summarize your main points.
- Rephrase and then restate your thesis statement.
- Your conclusion is **your chance to have the last word on the subject**. The conclusion allows you to have the final say on the issues you have raised in your paper, to synthesize your thoughts, to demonstrate the importance of your ideas, and to propel your reader to a new view of the subject.

8 FUTURE SCOPE

- Trustworthy reporting.
- Dashboards that visually showcase data.
- Improved messaging with automation.
- Proactive service.
- Efficiency enhanced by automation.
- Simplified collaboration.