

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 (pen) to activate (open) the start drawing!

Vikram A

To Add	Need more people	

Tamilvanan N

Need more data		

Yuganraj R

Need more data	Need more data to make it work	

Vignesh I

Need more data		

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
Object 2	Phone number
	phone
	Field label
	Data type
	Class
	Number
	Parent Address
	Text Area

3.2 Activity and Screenshot**MILESTONE:8**

Setup

Home

Object Manager

peris

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



All Users

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 User | User

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 | 18

<div> <div>New User</div> <div>Reset Password(s)</div> <div>Add Multiple Users</div> </div>					
<input type="checkbox"/> Action	Full Name	Alias	Username	Role	Active
<input type="checkbox"/> Edit	A VIKRAM	VA	vicki@arteccollege.com		✓ System Administrator
<input type="checkbox"/> Edit	A VIKRAM	VA	vikramensathvicki@gmail.com		✓ Custom Sales Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chathv00000000ch1taneat50tsibakezu@chatter.salesforce.com		✓ Chatter Free User
<input type="checkbox"/> Edit	User Integration	video	integration@000000000ch1taneat.com		✓ Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insighttsecuthv@000000000ch1taneat.com		✓ Analytics Cloud Security User
<div> <div>New User</div> <div>Reset Password(s)</div> <div>Add Multiple Users</div> </div>					

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

REPORT New Students Report **Students** [Refresh] [Filter] [Add Chart] [Save & Run] [Save] [Close] [Run]

Fields Outline Filter

Groups
GROUP ROWS
Add group...

Columns
Add column...
Students ID X
Students Student Name X
Students Owner Name X
Students Owner Alias X
Students Created Date X
Students Last Modified Date X
Students Created By X

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

Students ID Students Student Name Students Owner Name Students Owner Alias Students Created Date Students Last Modified Date Students Created By

No records returned. Try adding report filters:
 • Show All students
 • Edit other filters in the filter panel.

To Do List

MILESTONE:5

SETUP Profiles

Profile School profile Help for this Page

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.

Learn More About Us | Enable Sales Cloud Access | Enable Student Data Source Access | Enable Named Credential Access | Enable Custom Metadata Type Access | Enable Custom Service Definition Access | Enable Price Access | Enable Service Presence Status Access | Enable Custom Permissions

Profile Detail [Edit] [Clone] [Delete] [View Users]

Name	School profile		
User License	Analytics Cloud Integration User	Custom Profile	✓
Description			
Created By	YVR@AM.A	19/04/2023, 9:35 pm	Modified By YVR@AM.A, 19/04/2023, 9:41 pm

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	Order	Order Layout

MILESTONE:7

4. TRAIL HEAD PROFILE PUBLIC URL

TEAM LEAD <https://trailblazer.me/id/gajesh625>

TEAM MEMBER 1 <https://trailblazer.me/id/vignesh555>

TEAM MEMBER 2 <https://trailblazer.me/id/jayaseelangopi2002>

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.

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.
