

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

3.2 Activity and Screenshot**MILESTONE:8**

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

REPORT ▼ New Students Report / Students

Fields Outline Filters

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 Cr

No records returned. Try adding report filters:

• Show All students

• Edit other filters in the filter panel.

10 To Do List

MILESTONE:5

SETUP Profiles

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.

Learn It Basics | Enabled Area Class Access | Enabled Student Data Source Access | Enabled Named Credential Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definition Access | Enabled Price Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Edit Clone Delete View Users

Name	School profile	Custom Profile	✓
User License	Analytics Cloud Integration User		
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

The screenshot shows the Salesforce Setup interface. On the left sidebar, under "Users", the path "Permission Set Groups" > "Permission Sets" is highlighted. The main content area displays a green success message at the top: "2 assignments were successful." Below this is the "Assignment Summary" section, which contains a table with two rows of assignment data.

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

At the bottom right of the page, there is a blue button labeled "Done".

MILESTONE:6



SETUP

Users






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 New User](#)

[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit 	A. VIKRAM	va	vicki@artecollpro.com		✓	System Administrator
<input type="checkbox"/> Edit 	A. VIKRAM	va	vikramensahvicki@gmail.com		✓	Custom Sales Profile
<input type="checkbox"/> Edit 	Chatter.Exposed	Chatter	chathv.934560000ch1saeat50tahakazv@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit 	User_Integration	info	integration@156500000ch1saeat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit 	User_Security	sec	insightsecurity@600500000ch1saeat.com		✓	Analytics Cloud Security User

[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

MILESTONE

New Custom Field

Help for this Page

Step 4: Add to page layouts

Step 4 of 4

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 last 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.

☒ Add Field: Page Layout Name

☒ Default Layout

When finished, click Back & Save to create more custom fields, or click Back if you are done.

Previous

Back & Save

Save

Cancel

4. TRAIL HEAD PROFILE PUBLIC URL

TEAM LEAD

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

TEAM MEMBER 1

<https://trailblazer.me/id/vignesh2341>

TEAM MEMBER 2

<https://trailblazer.me/id/jayaseelangopi2002>

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.