

A CRM Application for Schools and Colleges

Project Report Template

1. INTRODUCTION:

1.1 OVERVIEW:

- The main aim of this project is to manage customer relationships, integrate with other systems, and to build own applications.
- Salesforce is the customer success platform, designed to help sell, service, market, analyse, and connect with the customer.
- CRM stands for Customer “Relationship Management”.
- Customer Relationship Management helps to manage the relationships with the customers.

1.2 PURPOSE:

- This is my first project in my college life. And I am very thankful to get this change to work as leader in the project of “A CRM Application for Schools and Colleges.
- This project helps us to understand the customer relationships, makes us to create new app, learned about “Project Development Process”, “Design Thinking”.
- Mural helps us to create the empathy map and Ideation & Brainstorming map.

2. PROBLEM DEFINITION & DESIGN THINKING:

Problem Definition:

Finding problem statement by using Ideation & Idea Prioritization.

Design Thinking:

Design thinking involves five steps:

- Empathize
- Define
- Ideate
- Prototype
- Test

2.1 EMPATHY MAP:

An Empathy Map is a simple, easy-to-digest visual that captures knowledge about a user's behaviour and attitudes. It is a useful tool to help teams better understand their users.

Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



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.

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Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#)



Build empathy

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

Says

What have we heard them say?
What can we imagine them saying?

Says to ask the opinion of the experts

says if the product is comfy to keep in the room.

says if the product is suitable

says which brand we need to buy



The thought of wasting the time

The thought of, whether the product has warranty



The thought of wasting the money

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

The fear of buying a unbranded product

Makes to think, whether the product has the storage capacity to store our information and things.

Rushmiya, k

Searching the best product in google



Searching the rates and reviews of the people, who bought it already.

Searching the new model of the product which was launched recently.



We may feel, we need to buy a better product than the product which we brought.

After buying the product, we may feel, the product is good or bad in functioning.

while comparing with other's product, we may feel that our product is best.

Does

What behavior have we observed?
What can we imagine them doing?

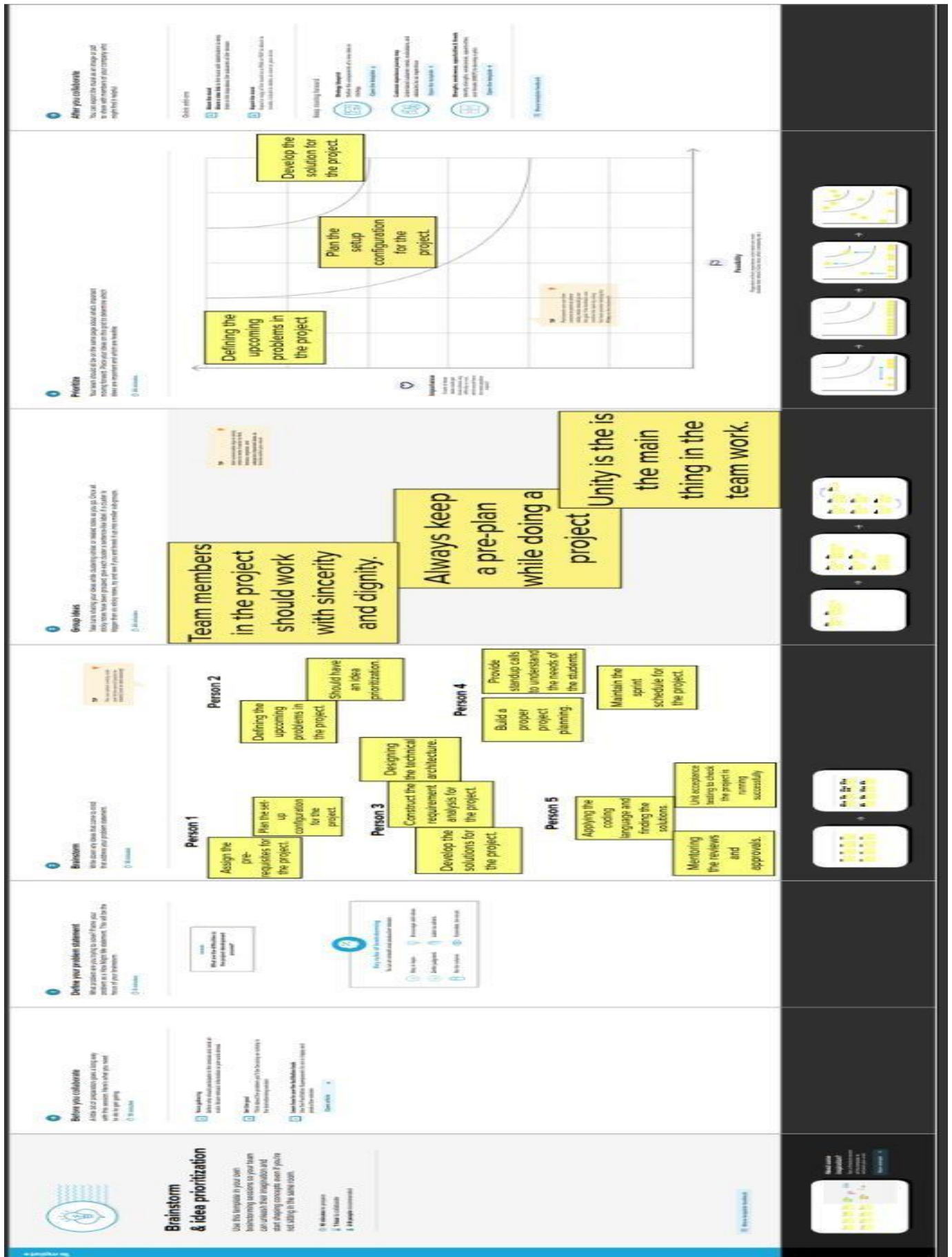
Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



Pasting the ideation & brainstorming Map screenshot.

Pasting the ideation & brainstorming Map screenshot.



3. RESULT:

3.1 DATA MODEL:

Object name	Fields in the object	
<u>Object 1:</u>		
	Field label	Data type
	School	Text Area
	Student	Picklist
<u>Object 2:</u>		
	Field label	Data type
	Parents	Text Area
	Student	Master-detail relationship

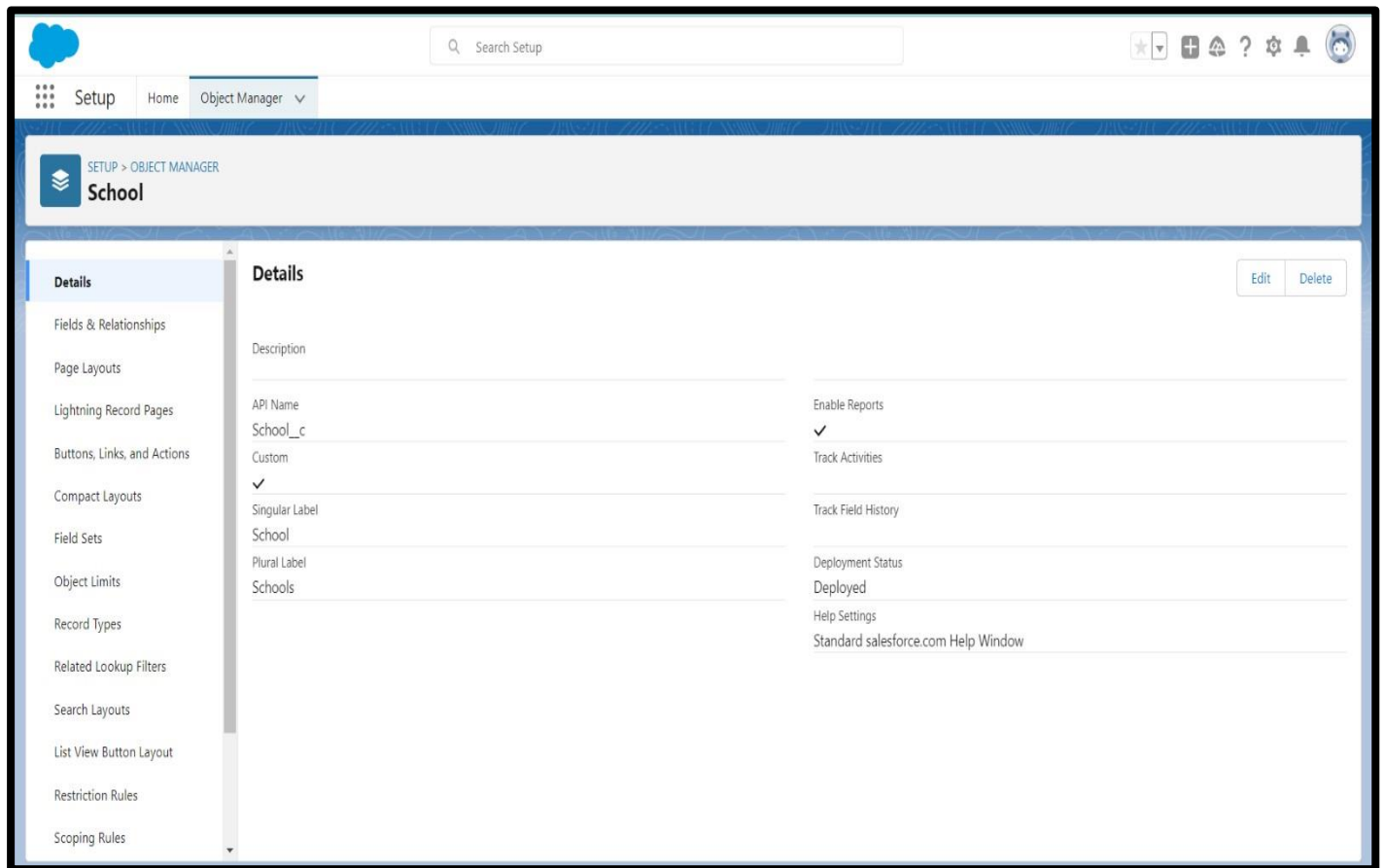
3.2 ACTIVITY & SCREENSHOTS:

Attaching the screenshots of the project “A CRM Applications for Schools and Colleges” along with the description.

MILESTONE-2: OBJECT

ACTIVITY-1: Creation of School object

Creation of objects for School Management:



The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main area displays the 'Details' for the 'School' object, including its API Name (School_c), Custom status, Singular Label (School), Plural Label (Schools), and various system settings like Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings.

Setup > OBJECT MANAGER
School

Details [Edit] [Delete]

Description

API Name: School_c

Custom: ☒

Singular Label: School

Plural Label: Schools

Enable Reports: ☒

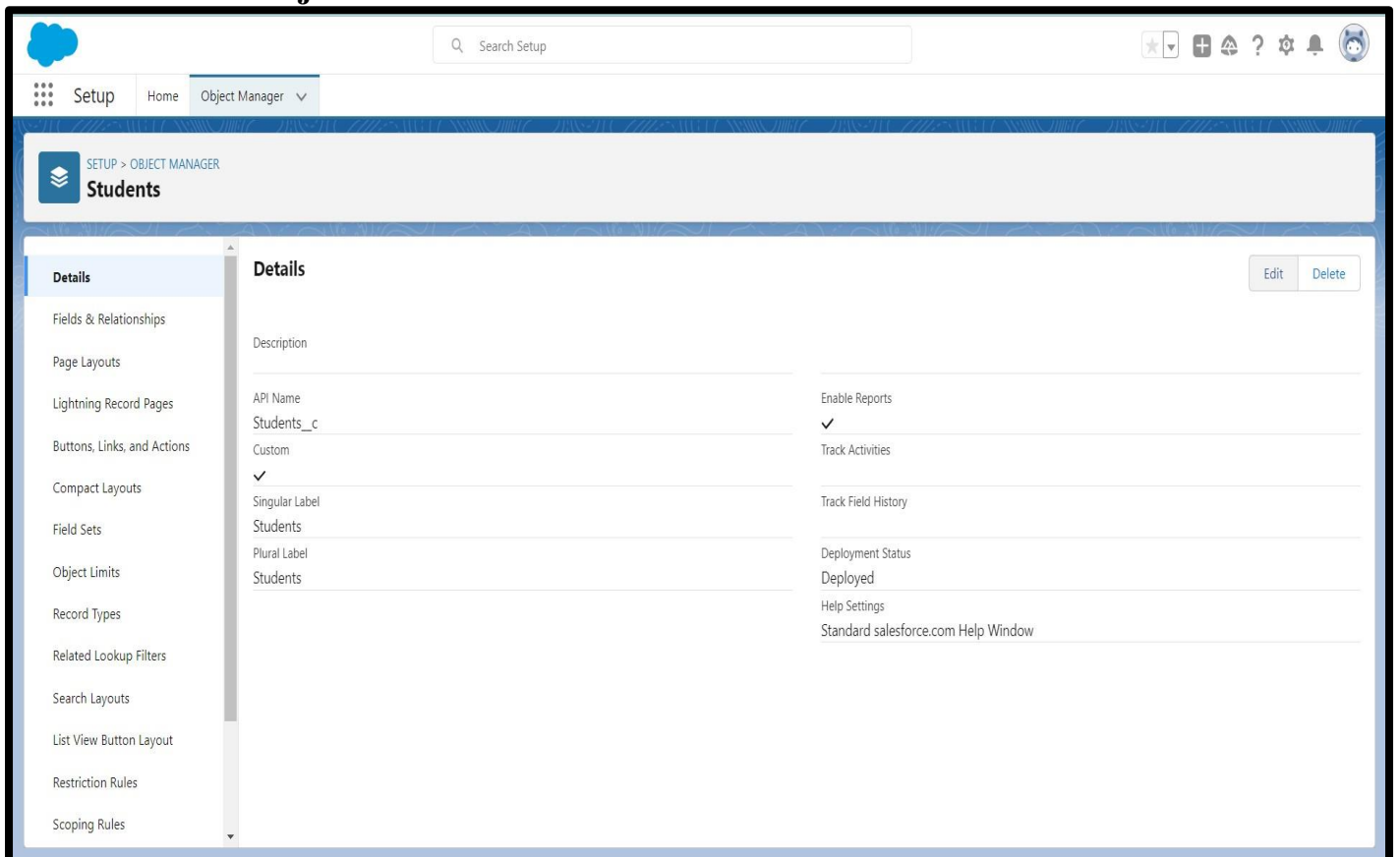
Track Activities: ☐

Track Field History: ☐

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

ACTIVITY 2: Create Student Object:



The screenshot shows the Salesforce Setup interface for the 'Students' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main area displays the 'Details' for the 'Students' object, including its API Name (Students_c), Custom status, Singular Label (Students), Plural Label (Students), and various system settings like Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings.

Setup > OBJECT MANAGER
Students

Details [Edit] [Delete]

Description

API Name: Students_c

Custom: ☒

Singular Label: Students

Plural Label: Students

Enable Reports: ☒

Track Activities: ☐

Track Field History: ☐

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

ACTIVITY 3: Create Parent Object:

The screenshot shows the Salesforce Setup interface for the 'Parent' object in the Object Manager. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Details' section is active, showing fields like Description, API Name (Parent_c), Custom (checked), Singular Label (Parent), Plural Label (Parents), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. Edit and Delete buttons are visible in the top right corner.


MILESTONE-3: LIGHTNING APP ACTIVITY: Create the School Management App:

The screenshot shows the Salesforce Lightning App Builder interface for the 'School Management' app. The left sidebar lists various settings: App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The 'App Details & Branding' section is active, showing fields for App Name (School Management), Developer Name (Rushmiya), and Description (Schools, Students, Reports, and Dashboards). The 'App Branding' section shows the Image upload button and the Primary Color Hex Value (#0070D2). The 'Org Theme Options' section has a checkbox for 'Use the app's image and color instead of the org's custom theme' which is checked. The 'App Launcher Preview' section shows a preview of the app icon (SM) and name (School Management) with its description.








MILESTONE-4: FIELDS AND RELATIONSHIP

ACTIVITY-1

Creation of fields for the School objects:



Search Setup



Setup

Home

Object Manager

School

SETUP > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

School

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 first 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

☒

School Layout

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

Previous

Save & New

Save

Cancel

Setup

Home

Object Manager

school webs

SETUP > OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

School Custom Field

School websites

Back to School

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	School websites	Object Name	School
Field Name	School_websites	Data Type	Text Area
API Name	School_websites__c		
Description	Helps the students to search for better schools		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K. 11/04/2023, 5:31 pm	Modified By	Rushmiya K. 12/04/2023, 5:59 pm

General Options

Required

Default Value

Validation Rules

New

Validation Rules Help

No validation rules defined.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Data.com Company

Details

Fields & Relationships

Page Layouts

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Related Lookup Filters

Validation Rules

Data.com Company Field

Phone Number

Back to Data.com Company Fields

Field Information

Field Label	Phone Number	Field Name	Phone
Data Type	Phone		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

ACTIVITY-2:

The screenshot displays the Salesforce Setup interface, specifically the Object Manager for the 'Students' object. The page title is 'Students Custom Field Results'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is divided into sections: 'Field Information', 'General Options', and 'Picklist Options'. The 'Field Information' section shows details for the 'Results' field, including its API name 'Results__c' and data type 'Picklist'. The 'General Options' section shows the 'Required' checkbox is unchecked. The 'Picklist Options' section shows the 'Restrict picklist to the values defined in the value set' checkbox is checked. The 'Controlling Field' is set to '(New)'. The top of the page features a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'.

Setup > OBJECT MANAGER

Students

Students Custom Field

Results

Back to Students

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Results	Object Name	Students
Field Name	Results	Data Type	Picklist
API Name	Results__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K, 11/04/2023, 6:01 pm	Modified By	Rushmiya K, 11/04/2023, 6:01 pm

General Options

Required	<input type="checkbox"/>
Default Value	<input type="text" value=""/>

Picklist Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
Controlling Field	(New)

Cloud Logo

Search Setup

SetupHomeObject Manager

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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Students Custom Field

Class

Back to Students

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Class	Object Name	Students
Field Name	Class	Data Type	Number
API Name	Class__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K, 11/04/2023, 6:02 pm	Modified By	Rushmiya K, 11/04/2023, 6:02 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Number Options

Cloud Logo

Search Setup

SetupHomeObject Manager

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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Students Custom Field

Marks

Back to Students

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Marks	Object Name	Students
Field Name	Marks	Data Type	Number
API Name	Marks__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K, 11/04/2023, 6:03 pm	Modified By	Rushmiya K, 11/04/2023, 6:03 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

ACTIVITY-3

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and a navigation bar with "Setup", "Home", and "Object Manager". Below this, the breadcrumb trail reads "SETUP > OBJECT MANAGER" and the page title is "Parent".

On the left sidebar, under "Details", the "Fields & Relationships" section is highlighted. Other options include "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", "Related Lookup Filters", "Search Layouts", "List View Button Layout", "Restriction Rules", and "Scoping Rules".

The main content area is titled "Parent Custom Field" and "Parent Address". It includes a "Back to Parent" link and a "Validation Rules (0)" link. Below this is the "Custom Field Definition Detail" section with tabs for "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?".

The "Field Information" section contains the following details:

Field Label	Parent Address	Object Name	Parent
Field Name	Parent_Address	Data Type	Text Area
API Name	Parent_Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K, 11/04/2023, 6:05 pm	Modified By	Rushmiya K, 11/04/2023, 6:05 pm

The "General Options" section includes a "Required" checkbox (unchecked) and a "Default Value" field.

The "Validation Rules" section has a "New" button and a message: "No validation rules defined." A "Validation Rules Help" link is also present.

The screenshot displays the Salesforce Setup interface for configuring a custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area shows the 'Parent Number' custom field configuration for the 'Parent' object.

Parent Custom Field
Parent Number
Back to Parent

[Validation Rules](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Parent Number	Object Name	Parent
Field Name	Parent_Number	Data Type	Phone
API Name	Parent_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rushmiya K. 11/04/2023, 6:07 pm	Modified By	Rushmiya K. 11/04/2023, 6:07 pm

General Options

Required ☐

Default Value

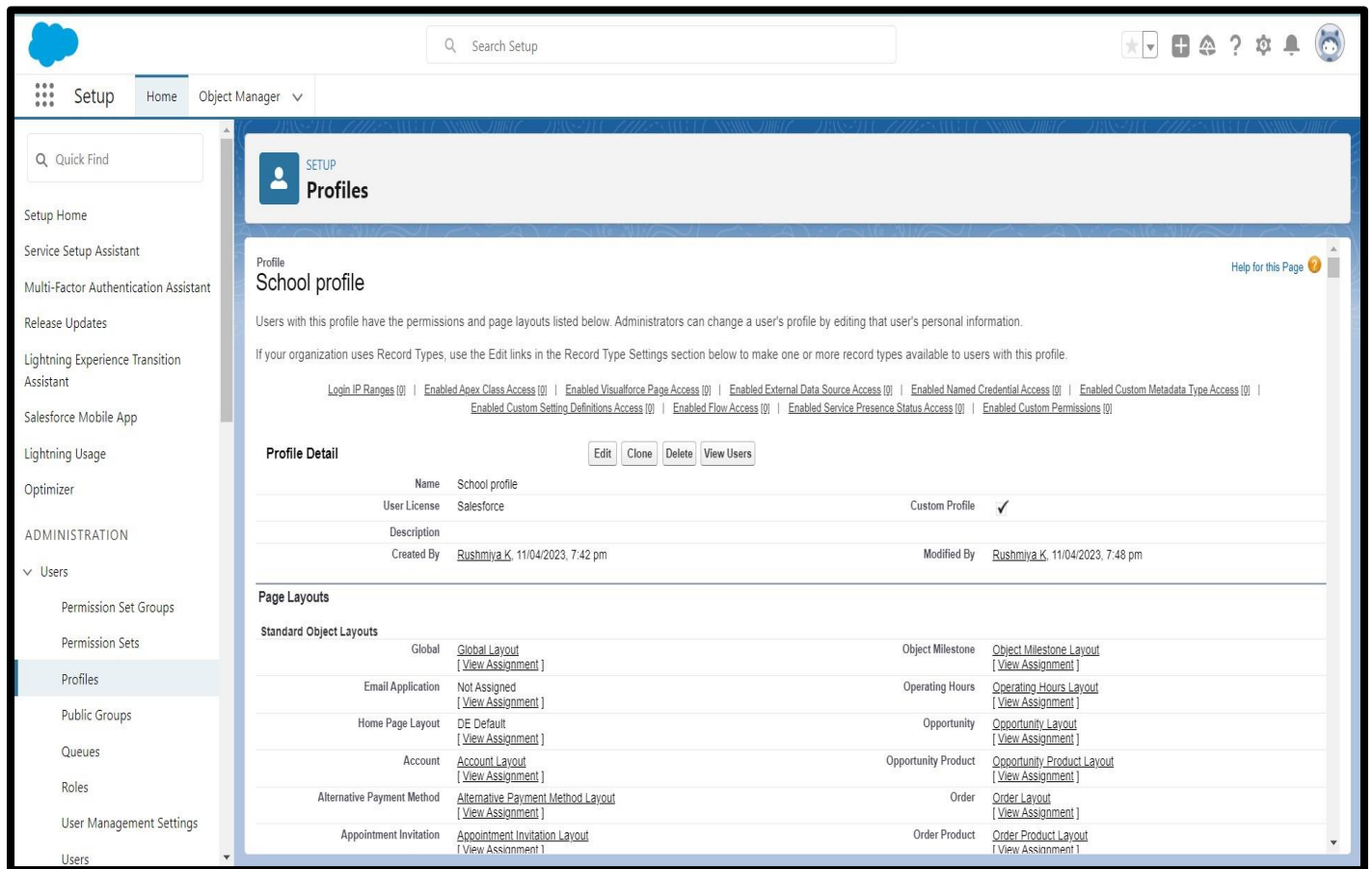
Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

MILESTONE-5

ACTIVITY

Creation on profile:



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains navigation links like 'Setup Home', 'Service Setup Assistant', and 'ADMINISTRATION'. The main content area displays the 'School profile' details, including a list of enabled permissions (e.g., Login IP Ranges, Apex Class Access) and a table of page layouts for various objects like Global, Email Application, and Home Page Layout.

Profile Detail

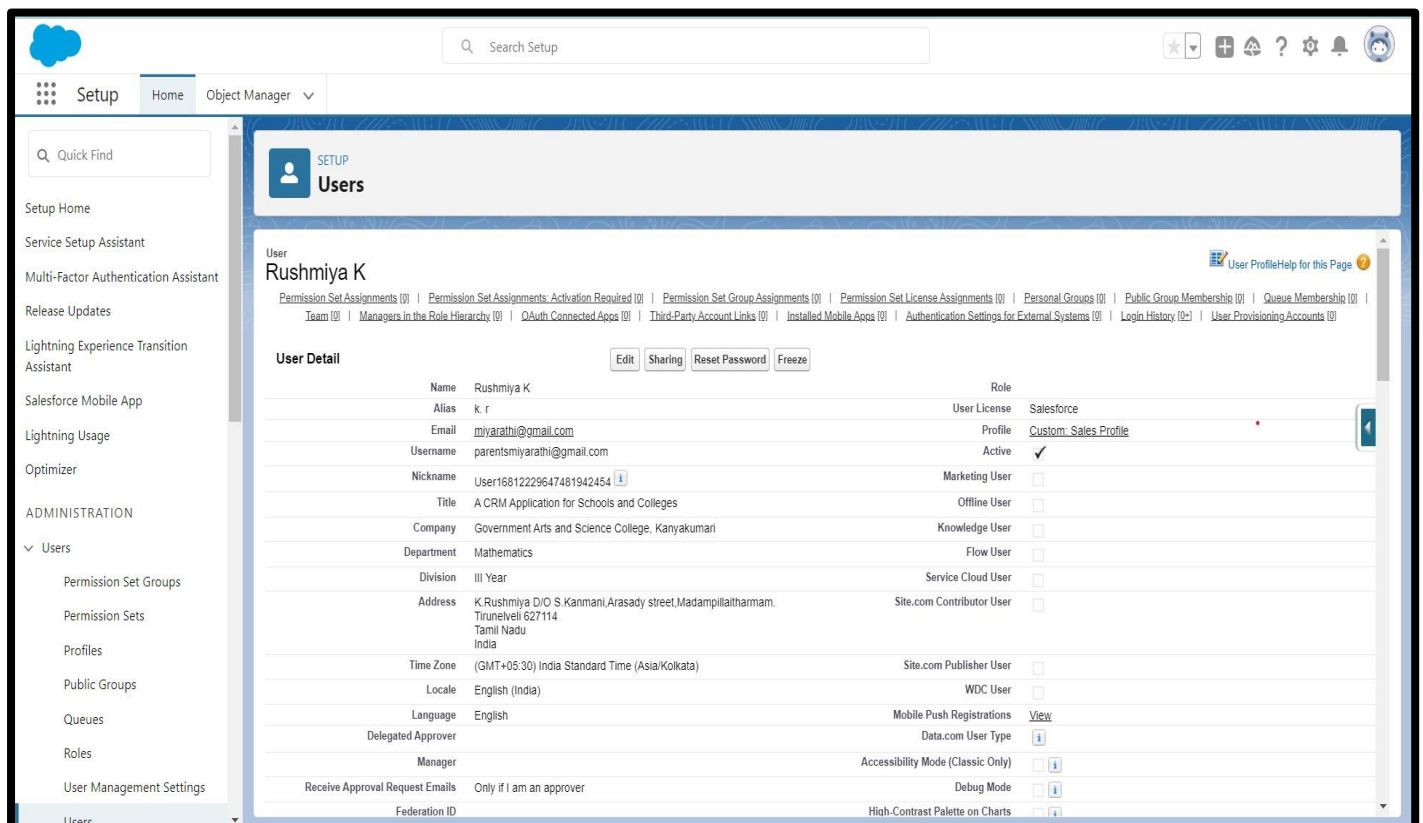
Name	School profile
User License	Salesforce
Description	
Created By	Rushmiya K, 11/04/2023, 7:42 pm
Modified By	Rushmiya K, 11/04/2023, 7:48 pm

Page Layouts

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

MILESTONE-6 USERS ACTIVITY:

Creating a Users:



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains navigation links like 'Setup Home', 'Service Setup Assistant', and 'ADMINISTRATION'. The main content area displays the 'User Detail' for 'Rushmiya K', including a list of permissions and a table of user information such as Name, Email, Username, and Role.

User Detail

Name	Rushmiya K	Role	
Alias	k. r	User License	Salesforce
Email	miyarathi@gmail.com	Profile	Custom Sales Profile
Username	parentsmyarathi@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16812229647481942454	Marketing User	<input type="checkbox"/>
Title	A CRM Application for Schools and Colleges	Offline User	<input type="checkbox"/>
Company	Government Arts and Science College, Kanyakumari	Knowledge User	<input type="checkbox"/>
Department	Mathematics	Flow User	<input type="checkbox"/>
Division	III Year	Service Cloud User	<input type="checkbox"/>
Address	K Rushmiya D/O S Kanmani, Arasady street, Madampillatharmam, Tirunelveli 627114, Tamil Nadu, India	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	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

Setup | Home | Object Manager

Quick Find

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings

SETUP Users

User: **Rushmiya K**

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Connected Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Name	Rushmiya K	Role	
Alias	rk	User License	Partner App Subscription
Email	miyarathi@gmail.com	Profile	Partner App Subscription User
Username	teachersmiyarathi@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16812235283934075787	Marketing User	<input type="checkbox"/>
Title	A CRM Application for Schools and colleges	Offline User	<input type="checkbox"/>
Company	Government Arts and Science College, Kanyakumari	Knowledge User	<input type="checkbox"/>
Department	Mathematics	Flow User	<input type="checkbox"/>
Division	III Year	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	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i

javascript:srcIn(%27%2F0055i000006zV6%3Enoredirect%3D1%26isUserEntryOverride%3D1%26isstro%3D01%27%3E

Setup | Home | Object Manager

Quick Find

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings

SETUP Users

User: **Rushmiya K**

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(2\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Connected Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(1+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Name	Rushmiya K	Role	
Alias	rk	User License	Partner App Subscription
Email	miyarathi@gmail.com	Profile	Partner App Subscription User
Username	principalsmiyarathi@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1681223748836818385	Marketing User	<input type="checkbox"/>
Title	A CRM Application for Schools and Colleges	Offline User	<input type="checkbox"/>
Company	Government Arts and Science College, Kanyakumari	Knowledge User	<input type="checkbox"/>
Department	Mathematics	Flow User	<input type="checkbox"/>
Division	III Year	Service Cloud User	<input type="checkbox"/>
Address	K.Rushmiya D/O S.Kanmani, Arasady street, Madampillatharamam, Tirunelveli 627114 Tamil Nadu	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	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

MILESTONE-7 PERMISSION SETS

ACTIVITY-1

Permission sets:

The screenshot shows the Salesforce Setup interface for the 'Teacher Permission' set. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings). The main content area displays the 'Permission Set Overview' for 'Teacher Permission' with the following details:

Field	Value
Description	Guiding the students in the right path
API Name	Teacher_Permission
License	
Namespace Prefix	
Session Activation Required	<input checked="" type="checkbox"/>
Created By	Rushmiya K, 11/04/2023, 8:20 pm
Last Modified By	Rushmiya K, 11/04/2023, 8:26 pm

Below the overview, 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.

ACTIVITY-2

Permission Sets 2:

The screenshot shows the Salesforce Setup interface for the 'Principle permission' set. The left sidebar is identical to the first screenshot. The main content area displays the 'Permission Set Overview' for 'Principle permission' with the following details:

Field	Value
Description	Head of the Administration of Schools and colleges
API Name	Principle_permission
License	
Namespace Prefix	
Session Activation Required	<input checked="" type="checkbox"/>
Created By	Rushmiya K, 11/04/2023, 8:32 pm
Last Modified By	Rushmiya K, 11/04/2023, 8:32 pm

Below the overview, 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.

MAILSTONE-8: REPORTS

ACTIVITY:

Reports:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' dropdown is selected, and the 'Contact' object is chosen. The left sidebar contains a list of setup categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, and Scoping Rules. The main content area is titled 'Contact Field Reports To' with a 'Back to Contact Fields' link. It includes buttons for 'Edit', 'Set Field-Level Security', and 'View Field Accessibility'. The 'Field Information' section displays a table with the following details:

Field Label	Reports To	Field Name	ReportsTo
Data Type	Lookup(Contact)		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below the field information, the 'Lookup Filter' section states 'No lookup filters defined.' The 'Validation Rules' section includes a 'New' button and states 'No validation rules defined.' A 'Validation Rules Help' link is also present.

4. TRAILHEAD PROFILE PUBLIC URL

- Team leader : <https://trailblazer.me/id/bscgv>
- Team Member 1 : <https://trailblazer.me/id/bscdk>
- Team Member 2 : <https://trailblazer.me/id/elavarasi14>
- Team Member 3 : <https://trailblazer.me/id/bgobikac>

5. ADVANTAGES & DISADVANTAGE:

List of advantages and disadvantages of the proposed solution.

ADVANTAGES	DISADVANTAGES
<ul style="list-style-type: none"> • Helps the students to improve their knowledge. 	<ul style="list-style-type: none"> • Most of the students doesn't have laptop to do their project.
<ul style="list-style-type: none"> • Lead a way create job opportunity. 	<ul style="list-style-type: none"> • Internet Problem.
<ul style="list-style-type: none"> • Makes us to understand the Customer Relationship Management 	<ul style="list-style-type: none"> • Don't have enough time to complete the project.

• Got an idea about Project Development Process.	• Fear to chat with Salesforce Administrator.
• Creating Empathy Map.	• Log in & Sign Up problems.

6. APPLICATIONS:

The area where this solution can be applied.

- ✦ It helps to create and develop new applications (app).
- ✦ Mainly helps to understand the customer mindset, while buying the product.
- ✦ It is also useful in cloud computing.

7. CONCLUSION:

- This project is a great path for the students who is seeking for bright future. This project mainly explains about the Customer Relationship Management.
- A great thankful to the team members of “NaanMudhalvan” who has worked a lot to provide us knowledge. And, again a great thankful to the “Salesforce Administrator” who is responding to our complaints and queries.

8. FUTURE SCOPE:

Today the world is fully computerised, so this project helps us to acquire some knowledge to access applications in the computer.

The world’s first billionaire is “Jeff Bezos”, who is the owner of the amazon app, because today everything is happening through online, we can bill, shop, transfer money. And everything depends on salesforce and customer relationship management, because while sale a product we should fulfil the customer needs and the customer wants to satisfied, so that the customer will come again to buy a new product. So customer relationship management is much essential in today’s world. And this field will have a stunning scope in future.

