

Project Report Template

1 INTRODUCTION

1.1 Overview

A school management CRM (customer relationship management) is a software tool designed to help schools and educational manage their interactions with students, parents ,teachers, and other stakeholders. With a school management CRM , you can : Keep track of student and parent contact information , including phone numbers ,email addresses, and physical addresses

Track and analyze student performance and progress

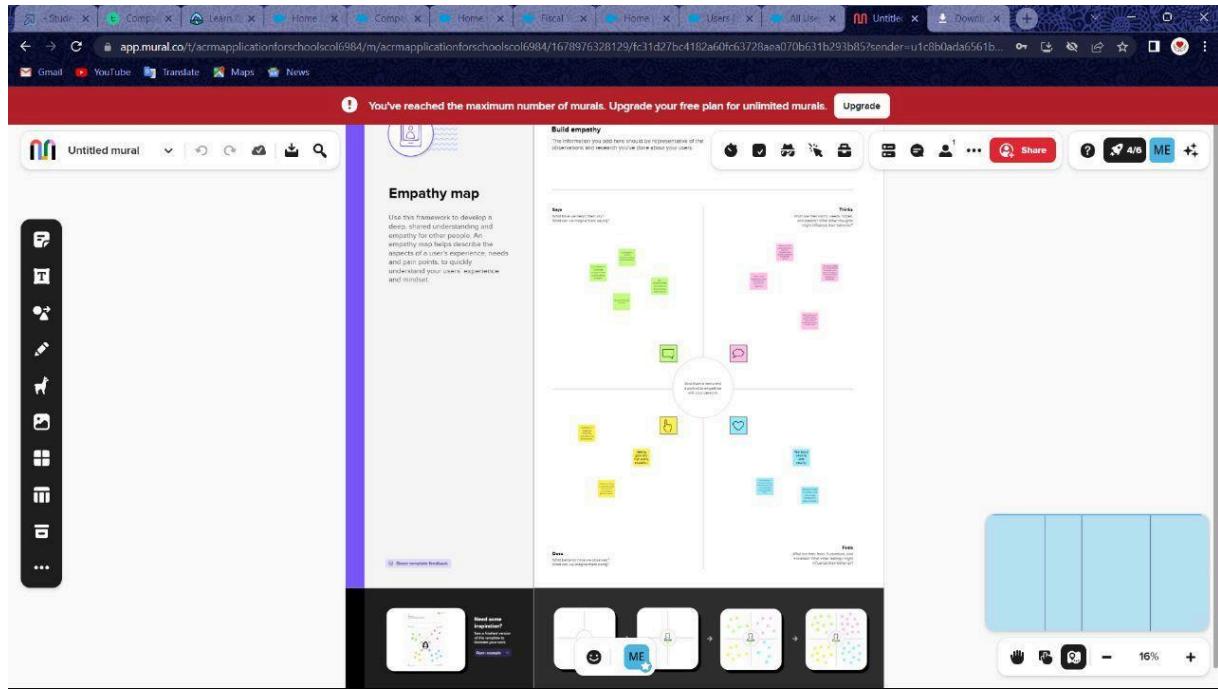
Overall, a school management CRM helps to streamline and automate many of the administrative tasks associated with running a school, making it easier for educators to focus more on their primary goal of providing high-quality education to their students .

1.2 Purpose

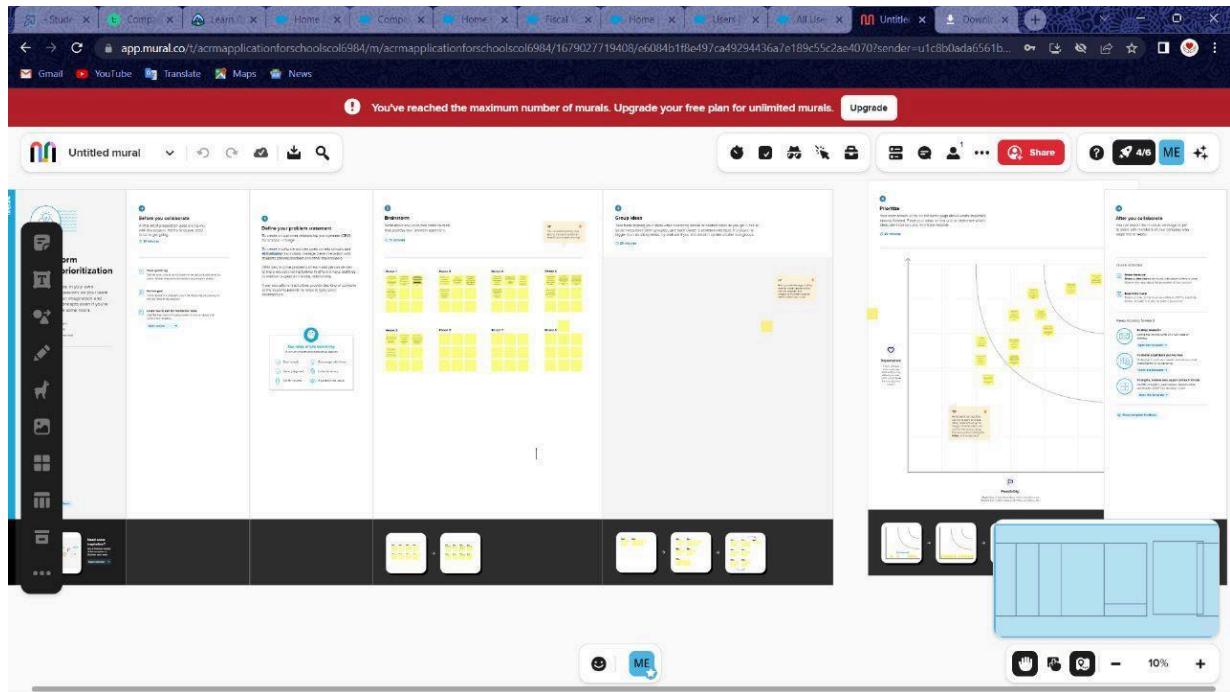
- Provides good customer relationship management with schools, students and parents.
- Provides detailed information of the schools, students and parents.
- Provides teachers to focus more on there primary goals and provide high-quality education.
- Provides you all the related details of students and school like providing the mark of the students and highest score and etc..
- Provides to see the reports and progress of the students.
- Provides easy access and manage the time management.
- Provides user friendly atmosphere and it is made in very simple understanding language.
- Provides every single detailed information of the students.
- Provides very secured and safe environment while using it.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object name	Fields in the Object															
School	<table border="1"><thead><tr><th>Field Label</th><th>Data Type</th></tr></thead><tbody><tr><td>Address</td><td>Text Area</td></tr><tr><td>District</td><td>Text Area</td></tr><tr><td>School</td><td>Text Area</td></tr><tr><td>Phone Number</td><td>Phone</td></tr><tr><td>Number of Students</td><td>Roll-up Summary</td></tr><tr><td>Highest Marks</td><td>Roll-up Summary</td></tr></tbody></table>		Field Label	Data Type	Address	Text Area	District	Text Area	School	Text Area	Phone Number	Phone	Number of Students	Roll-up Summary	Highest Marks	Roll-up Summary
Field Label	Data Type															
Address	Text Area															
District	Text Area															
School	Text Area															
Phone Number	Phone															
Number of Students	Roll-up Summary															
Highest Marks	Roll-up Summary															
Student	<table border="1"><thead><tr><th>Field Label</th><th>Data Type</th></tr></thead><tbody><tr><td>Phone Number</td><td>Phone</td></tr><tr><td>School</td><td>Master- Detail Relationship</td></tr><tr><td>Results</td><td>Picklist</td></tr><tr><td>Class</td><td>Number</td></tr><tr><td>Marks</td><td>Number</td></tr></tbody></table>		Field Label	Data Type	Phone Number	Phone	School	Master- Detail Relationship	Results	Picklist	Class	Number	Marks	Number		
Field Label	Data Type															
Phone Number	Phone															
School	Master- Detail Relationship															
Results	Picklist															
Class	Number															
Marks	Number															
Parent	<table border="1"><thead><tr><th>Field Label</th><th>Data Type</th></tr></thead><tbody><tr><td>Parent Address</td><td>Text Area</td></tr><tr><td>Parent Number</td><td>Phone</td></tr></tbody></table>		Field Label	Data Type	Parent Address	Text Area	Parent Number	Phone								
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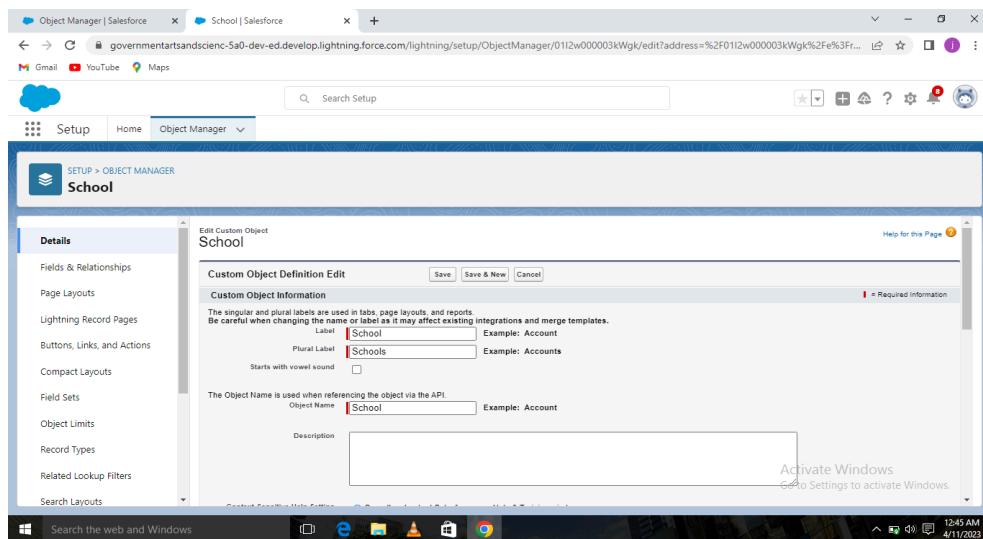
3.2 Activity & Screenshot

Milestone-Object

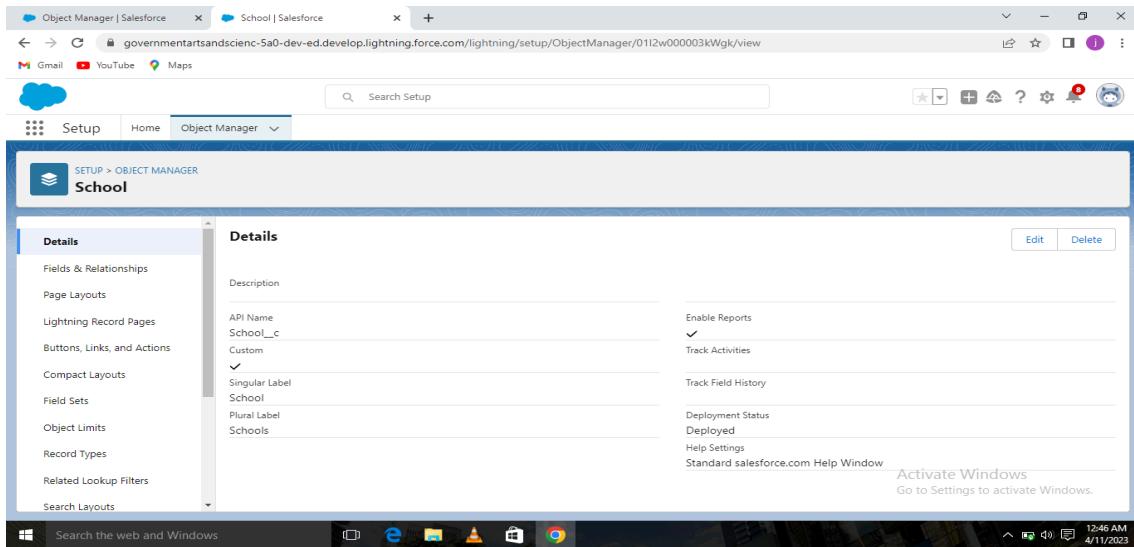
Activity-1: Creation of School Object

First we need to login to the salesforce. Now we need to create objects for school managements for schools ,students and parents .So now we are going to create object for schools.

First click on gear icon then click on setup and then click on the object manager then click on the dropdown symbol at the right and select custom object then fill the details of the label in single and plural way as school ,schools and object name as school and then scroll down and then check the Allow Reports checkbox and Check the Allow Search checkbox and then Click Save and then under Custom Object Tabs, click New and For Object, select School and For Tab Style, select any icon.Leave all defaults as is. Click Next, Next, and Save.

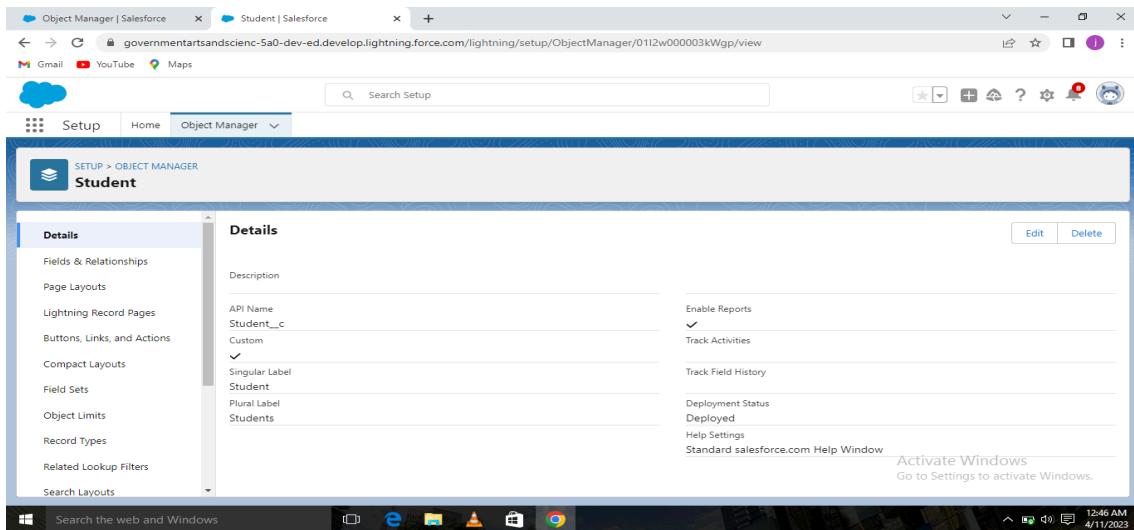


After saving you will get into the picture given below now the object for school has been made.



Activity 2: Create student object

As we did in the above schools object we follow the same steps and create students object here.



Activity 3: Create parent object

As we did in the above schools ,students object we follow and obtain object for parents here.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has tabs for 'Object Manager | Salesforce' and 'Parent | Salesforce'. The address bar shows the URL: governmentartsandscienc-5a0-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kWh4/view. Below the header is a search bar with the placeholder 'Search Setup'. The main content area is titled 'Parent' under 'SETUP > OBJECT MANAGER'. On the left is a sidebar with a tree view of object settings: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' tab is selected. The main panel displays the following details for the 'Parent' object:

Description	
API Name	Parent__c
Custom	✓
Singular Label	Parent
Plural Label	Parents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main panel, there is a message: 'Activate Windows' and 'Go to Settings to activate Windows.' The status bar at the bottom shows the Windows taskbar with icons for File Explorer, Edge, File, Task View, VNC, and Google Chrome. The system tray shows the date and time as 4/11/2023 12:47 AM.

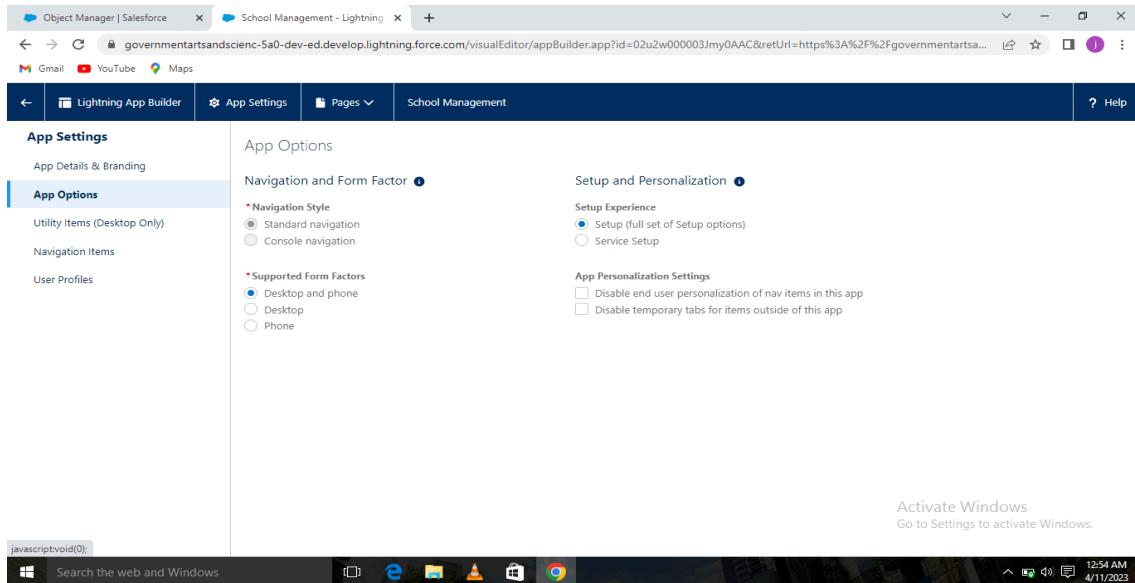
Milestone-Lightning App

Activity: Create the School Management app

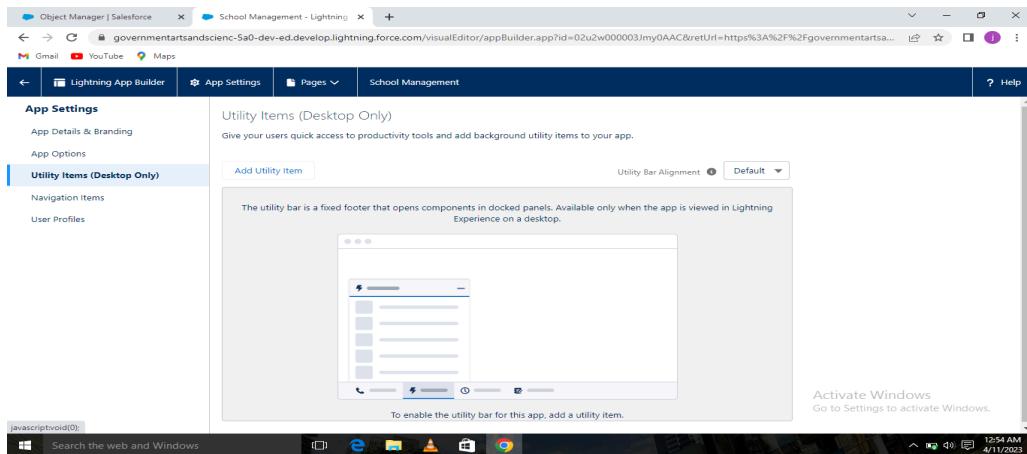
From Setup, enter App Manager in the Quick Find and select App Manager. Click New Lightning App. Enter School Management as the App Name, then click Next.

The screenshot shows the Lightning App Builder interface. The top navigation bar has tabs for 'Object Manager | Salesforce' and 'School Management - Lightning'. The address bar shows the URL: governmentartsandscienc-5a0-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000003jmy0AAC&retUrl=https%3A%2F%2Fgovernmentartsa... Below the header is a navigation bar with tabs for 'Lightning App Builder', 'App Settings', 'Pages', and 'School Management'. The main content area is titled 'App Settings' and 'App Details & Branding'. The left sidebar lists 'App Settings' sections: App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The 'App Details & Branding' section contains fields for 'App Name' (School Management), 'Developer Name' (School_Management), 'Image' (Upload button), 'Primary Color Hex Value' (#0070D2), 'Description' (Enter a description...), and 'Org Theme Options' (checkbox for 'Use the app's image and color instead of the org's custom theme'). The 'App Launcher Preview' shows a preview card with the 'SM' logo and the text 'School Management'. The status bar at the bottom shows the Windows taskbar with icons for File Explorer, Edge, File, Task View, VNC, and Google Chrome. The system tray shows the date and time as 4/11/2023 12:54 AM.

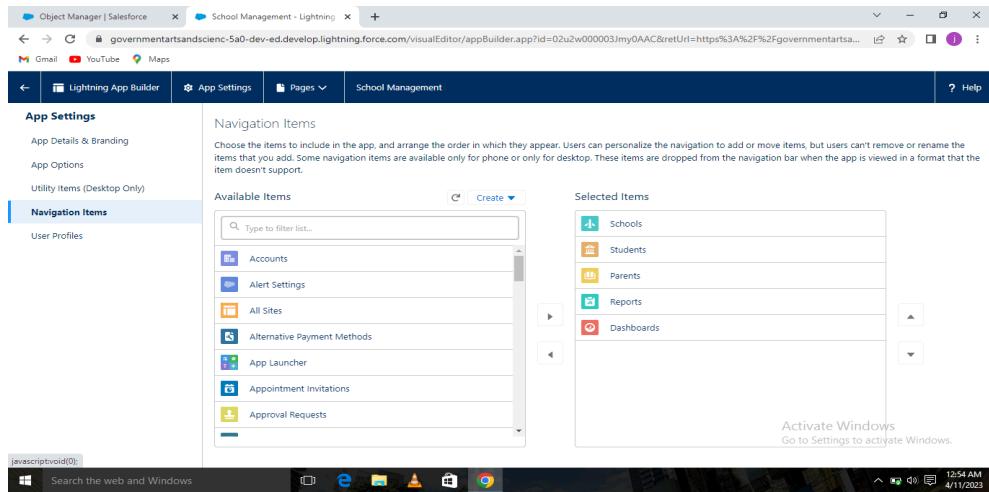
Under App Options, leave the default selections and click Next.



Under Utility Items, leave as is and click Next.

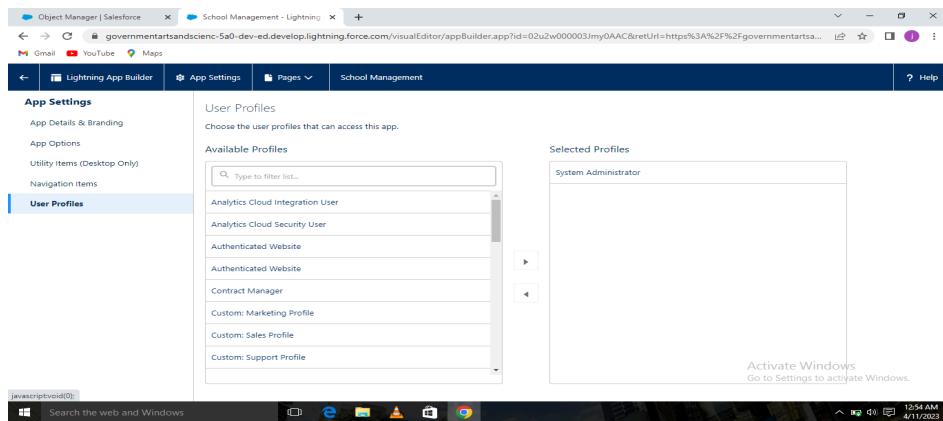


From Available Items, select Schools ,Students ,Parents, Reports, and Dashboards and move them to Selected Items. Click Next.



From Available Profiles, select System Administrator and move it to Selected Profiles.

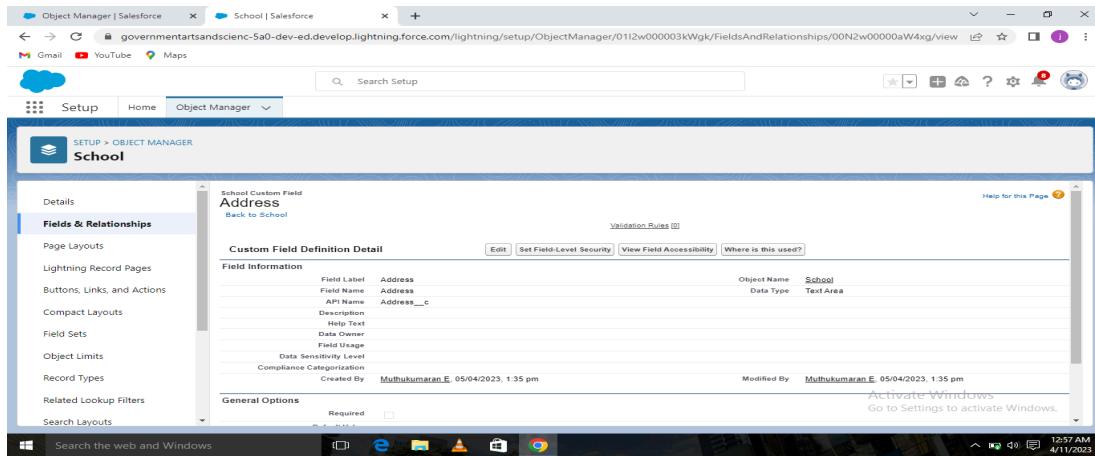
Click Save & Finish. To verify your changes, click the App Launcher, type School Management and select the School Management app. The School Management has been prepared.



Milestone -Fields and Relationship

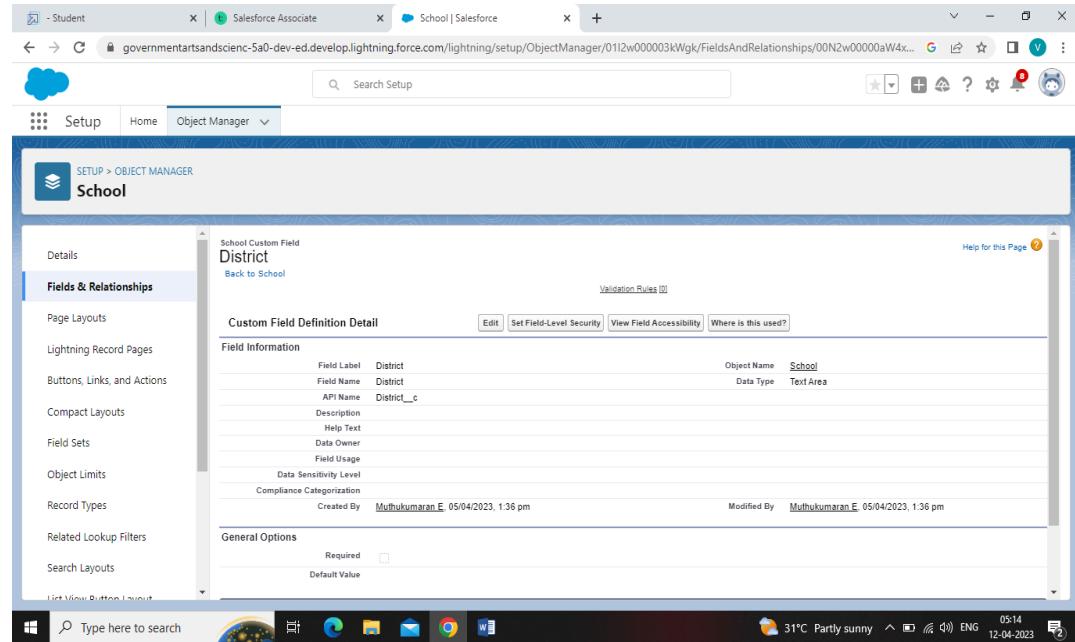
Activity-1: Creation of fields for the School objects:

Click on the school object. Select Fields & Relationships from the left navigation, and click New. Select the Text Area as the Data Type, then click Next .For Field Label, enter Address .Click Next, Next, then Save & New.



We create two more text areas with District ,State and School websites as the field labels as we have done above.

District :



State:

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'School' and lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'School Custom Field State' and shows the 'Custom Field Definition Detail' for the 'State' field. The field information includes:

Field Label	State	Object Name	School
Field Name	State	Data Type	Text Area
API Name	State__c		
Description	Help Text		
	Data Owner		
	Field Usage		
	Data Sensitivity Level		
Compliance Categorization			

General Options include 'Required' (unchecked) and 'Default Value'. The field was created by 'Muthukumaran_E' on 05/04/2023, 1:36 pm, and last modified by the same user on the same date at 1:36 pm.

School Websites:

The screenshot shows the Salesforce Object Manager interface, similar to the previous one but for the 'School websites' field. The left sidebar is titled 'School' and lists various setup options. The main content area is titled 'School Custom Field School websites' and shows the 'Custom Field Definition Detail' for the 'School websites' field. The field information includes:

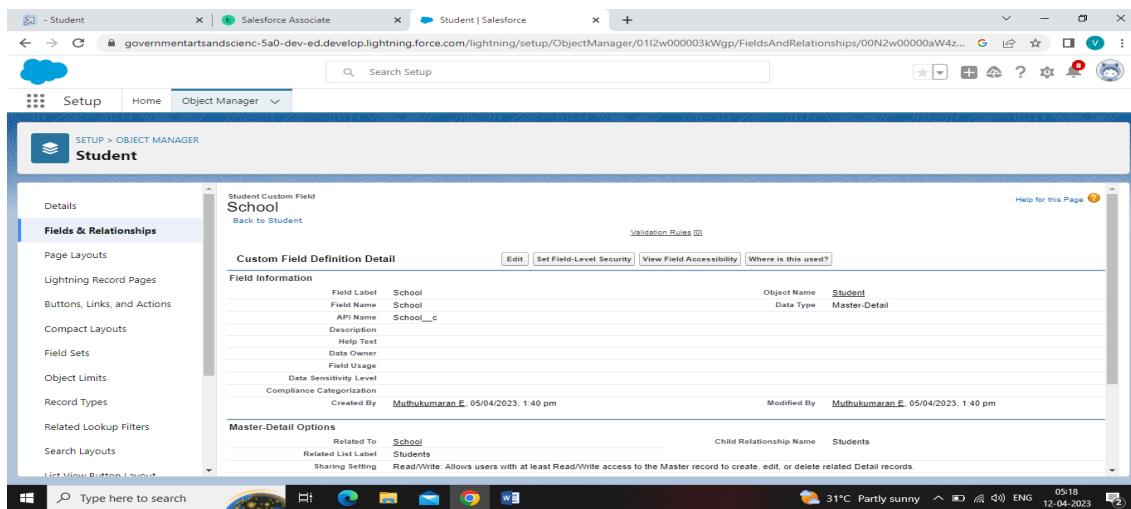
Field Label	School websites	Object Name	School
Field Name	School_websites	Data Type	Text Area
API Name	School_websites__c		
Description	Help Text		
	Data Owner		
	Field Usage		
	Data Sensitivity Level		
Compliance Categorization			

General Options include 'Required' (unchecked) and 'Default Value'. The field was created by 'Muthukumaran_E' on 05/04/2023, 1:37 pm, and last modified by the same user on the same date at 1:37 pm.

Activity-2: Creation of fields for the Student objects:

Select the Phone as the Data Type, then click Next .For Field Label, enter Phone Number .Click Next, Next, then Save & New.Let's create a master-detail relationship with school object.Select Master-Detail Relationship as the Data Type and click Next.For Related to, enter School.Click Next.For Field Label, enter School.Click Next, Next, Next and Save.Select Picklist as the Data Type and click Next.For Field Label enter Results.Select Enter values, with each value separated by a new line and enter these values:Pass,Fail.Click Next, Next, then Save & New Lets create a Number field.Select the Number as the Data Type, then click Next.For Field Label, enter Class.Click Next, Next, then Save & New.

School :



SETUP > OBJECT MANAGER

Student

Fields & Relationships

Custom Field Definition Detail

Field Label	School	Object Name	Student
Field Name	School	Data Type	Master-Detail
API Name	School__c		

Validation Rules [0]

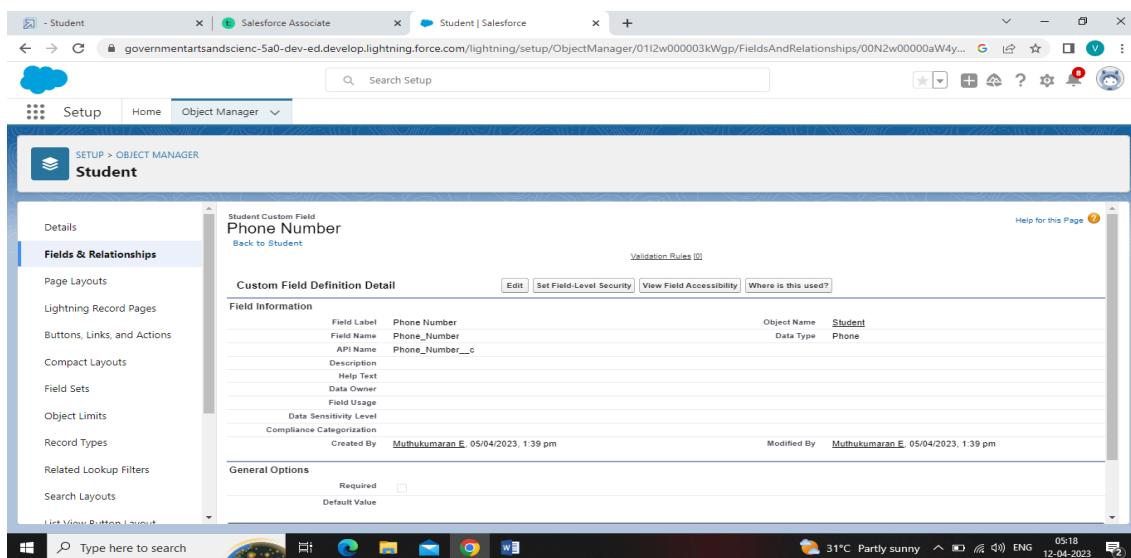
Field Information

Field Label: School
Field Name: School
API Name: School__c
Object Name: Student
Data Type: Master-Detail
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: Muthukumaran_E 05/04/2023, 1:40 pm
Modified By: Muthukumaran_E 05/04/2023, 1:40 pm

Master-Detail Options

Related To: School
Child Relationship Name: Students
Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records

Phone Number :



SETUP > OBJECT MANAGER

Student

Fields & Relationships

Custom Field Definition Detail

Field Label	Phone Number	Object Name	Student
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number__c		

Validation Rules [0]

Field Information

Field Label: Phone Number
Field Name: Phone_Number
API Name: Phone_Number__c
Object Name: Student
Data Type: Phone
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: Muthukumaran_E 05/04/2023, 1:39 pm
Modified By: Muthukumaran_E 05/04/2023, 1:39 pm

General Options

Required:
Default Value:

Results :

The screenshot shows the Salesforce Setup interface for creating a custom field. The object being created is 'Student'. The 'Fields & Relationships' tab is selected. The 'Field Information' section shows the following details:

Field Label	Results	Object Name	Student
Field Name	Results	Data Type	Picklist
API Name	Results__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

General Options section:

- Required:
- Default Value:

Validation Rules: [View](#)

Where is this used?: [View](#)

By following steps 1 through 3 and create one more number field with Marks as the field labels.

Marks :

The screenshot shows the Salesforce Setup interface for creating a custom field. The object being created is 'Student'. The 'Fields & Relationships' tab is selected. The 'Field Information' section shows the following details:

Field Label	Marks	Object Name	Student
Field Name	Marks	Data Type	Number
API Name	Marks__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

General Options section:

- Required:
- Unique:
- External ID:

Validation Rules: [View](#)

Where is this used?: [View](#)

Activity-3: Creation of fields for the Parent objects:

Select the Text Area as the Data Type, then click Next .For Field Label, enter Parent Address .Click Next, Next, then Save & New .Select the Phone as the Data Type, then click Next. For Field Label, enter Parent Number .Click Next, Next, then Save & New.

Parent Address :

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Parent' object. A new custom field named 'Parent Address' has been created. The 'Field Information' section shows 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			

The 'General Options' section indicates that the field is Required. The 'Created By' and 'Modified By' fields show 'Muthukumaran E' with the timestamp '05/04/2023, 1:47 pm'. The status bar at the bottom right shows '31°C Party sunny' and the date '12-04-2023'.

Parent Number :

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Parent' object. A new custom field named 'Parent Number' has been created. The 'Field Information' section shows the following details:

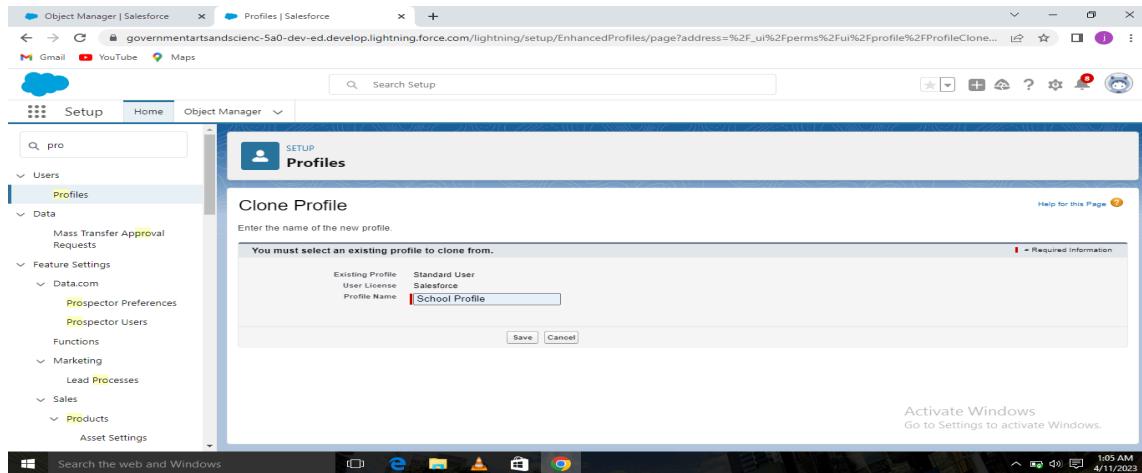
Field Label	Parent Number	Object Name	Parent
Field Name	Parent_Number	Data Type	Phone
API Name	Parent_Number_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

The 'General Options' section indicates that the field is Required. The 'Created By' and 'Modified By' fields show 'Muthukumaran E' with the timestamp '05/04/2023, 1:48 pm'. The status bar at the bottom right shows '31°C Party sunny' and the date '12-04-2023'.

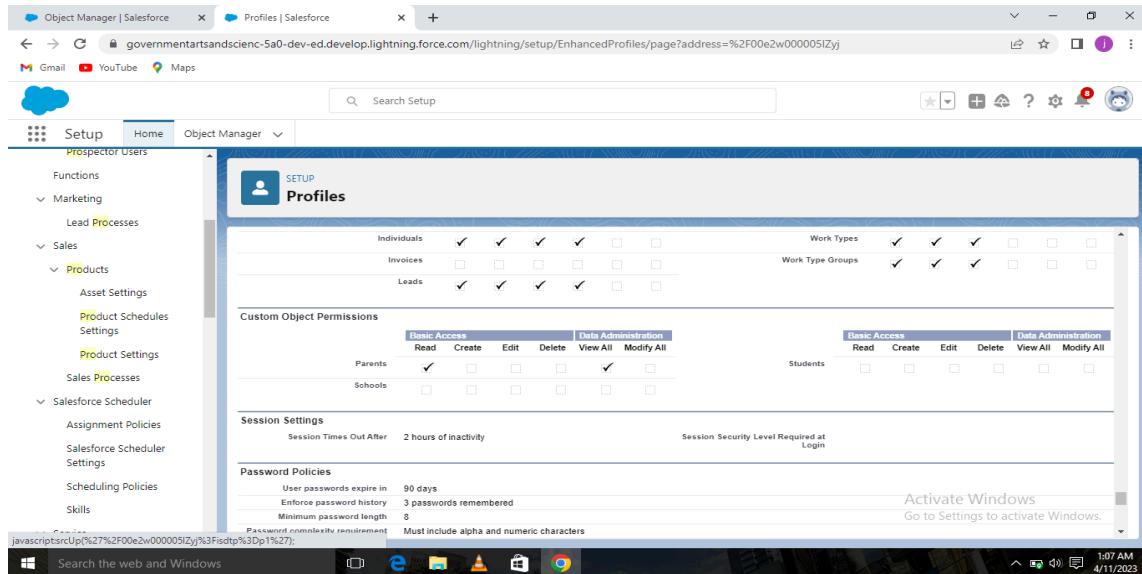
Milestone- Profile

Activity: Creation on profile

Setup enter Profiles in the Quick Find box, and select Profiles. From the list of profiles, find Standard User. Click Clone. For Profile Name, enter School profile. Click Save.



While still on the School profile page, then click **Edit**. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile.



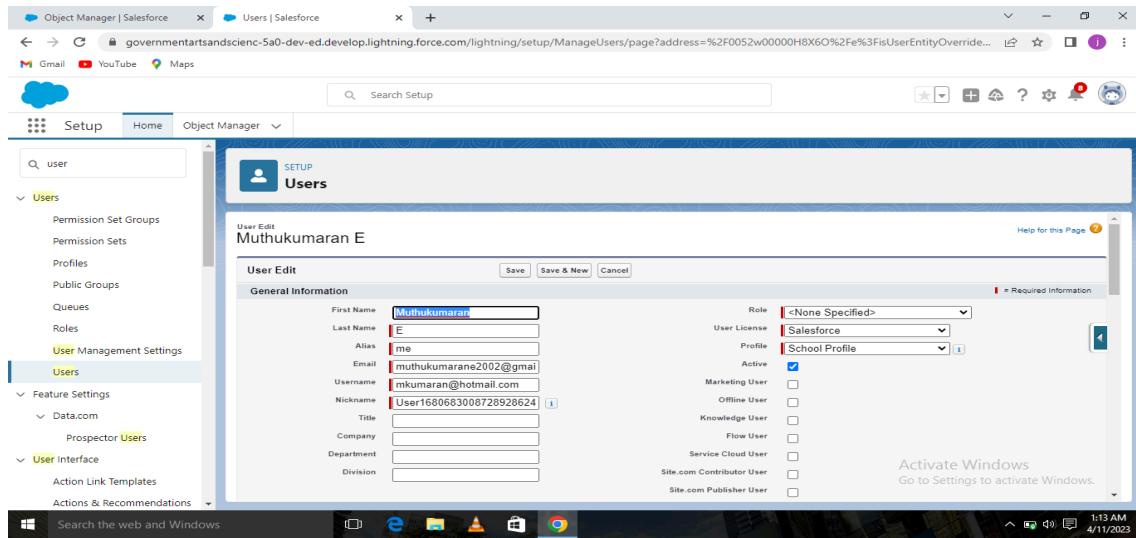
Milestone- Users

Activity : Creating a Users:

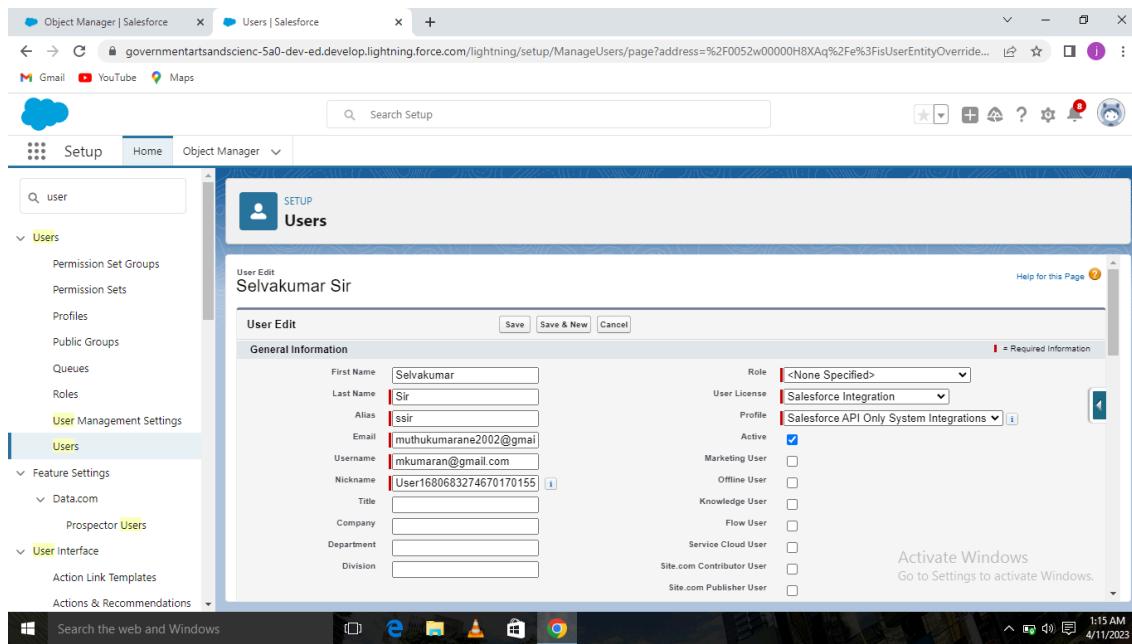
From Setup, in the Quick Find box, enter Users, and then select Users .Click New User.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Executor	Chatter	chatty_00d2w00000rsfVheaz_1adj031ounlf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	E_Muthukumaran	ME	muthukumaran@hotmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	E_Muthukumaran	me	mukumaran@hotmail.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/>	st_Joselin	stJ	mkumaran@comcast.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Sir_Selvamur	sai	mukumaran@gmail.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/>	User_Integration	integ	integration_00d2w00000rsfVheaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	isightssecurity_00d2w00000rsfVheaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

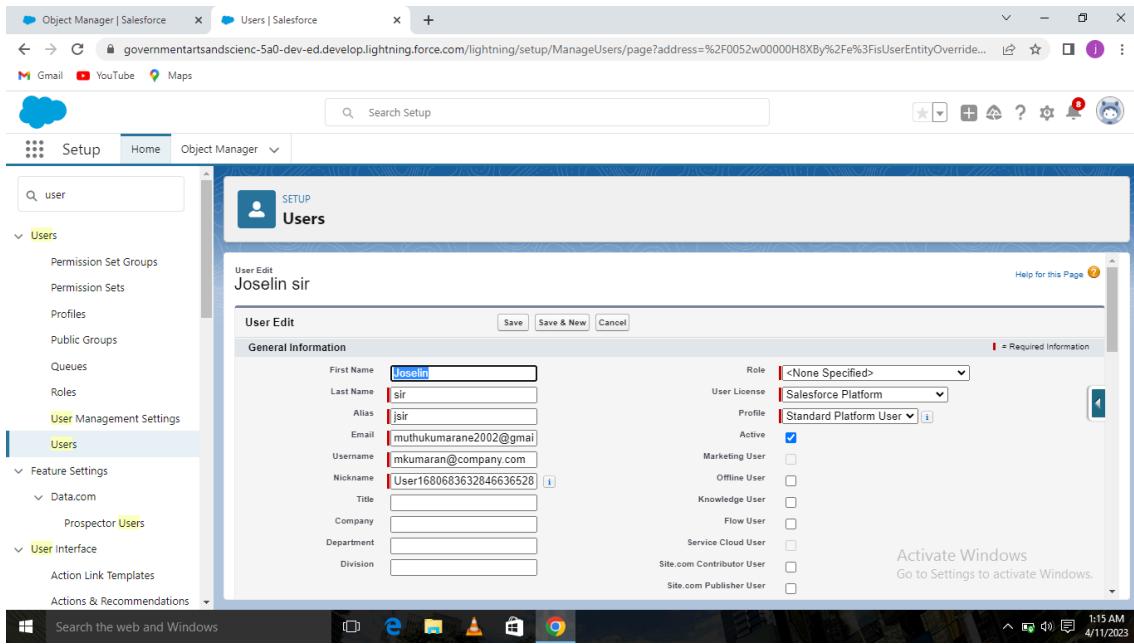
Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address. Select a User License As salesforce. Select a profile as a School profile. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



Similarly follow the above steps and create users as Teachers.



Similarly follow the above steps and create users as Principal.



Milestone-Permission sets

Activity-1: Permission sets 1

From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets .Click New. Give the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user.

The screenshots illustrate the process of creating and assigning a permission set in Salesforce:

- Screenshot 1: Permission Set Create**
Shows the 'Create' screen for a new permission set. The 'Label' is 'Teacher.permission' and the 'API Name' is 'Teacher_permission'. A note indicates that session activation is required.
- Screenshot 2: Permission Set Overview**
Shows the details for the 'Teacher.permission' permission set, including its API name ('Teacher_permission'), namespace prefix ('Muthukumaras'), and creation date ('05/04/2023, 2:10 pm'). It also lists assigned apps.
- Screenshot 3: Select Users to Assign**
Shows the 'Select Users to Assign' screen where the user 'Muthukumaras' is selected for assignment.
- Screenshot 4: Permission Sets Home**
Shows the 'Permission Sets' home page with a list of existing permission sets, including 'Teacher.permission'.

Activity-2: Permission sets 2

From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets. Click New. Give the name of the Permission set name as Principal_permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

The screenshot shows a browser window with two tabs open: "Object Manager | Salesforce" and "Permission Sets | Salesforce". The URL in the address bar is governmentartsandscienc-5a0-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home. The main content area displays the "Permission Sets" page under the "SETUP" tab. The sidebar on the left is titled "Users" and includes links for "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", and "Users". The "Users" link is currently selected. The main content area has a heading "Permission Sets" and a sub-section "On this page you can create, view, and manage permission sets." It also mentions that users can download the Salesforce mobile app from the App Store or Google Play. Below this is a table header for "All Permission Sets" with columns for "Action", "Permission Set Label", and "Description". A navigation bar at the bottom of the page shows "1-1 of 1" and "0 Selected". The status bar at the bottom of the browser window shows "Activate Windows Go to Settings to activate Windows Page 1 of 1". The taskbar at the bottom of the screen shows the Windows Start button, a search bar with "Search the web and Windows", and several pinned icons for Edge, File Explorer, File History, OneDrive, and Google Chrome.

Milestone-Reports

Activity- Reports :

From the Reports tab, click New Report. Select the report type as School with students and parents for the report, and click Create. Customize your report, then save or run it.

The screenshot shows the Salesforce Report Builder interface. A search bar at the top contains the text "sch". Below it, a table lists report types under the category "Schools with Students". The table has columns for "Report Type Name" and "Category". Two entries are shown: "Schools" (Standard) and "Schools with Students" (Standard). To the right of the table, a "Details" panel is open for the "Schools with Students" report. It shows the report name "Schools with Students" and its status as "Standard Report Type". There is a "Start Report" button and a link to "New Schools with Students Report". The background shows the standard Salesforce navigation bar with tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More.

After creating now we enter the datas in students,parents,school and create report using the new New schools with students report and New Parent Report and the dashboards are also made.

New Schools with Students Report

REPORT Schools with Students Report

Outline Filters

Groups: GROUP ROWS Add group... Search...

Columns: Add column... School: School Name Student: Student Name

School: School Name Student: Student Name

1 Christian Welfare High school Tanya
2 Christian Welfare High school Anisha
3 Atomic Energy Central School Rithu
4 Joseph Convent School Ram
5 Hindu School Rajesh
6 Hindu School Pavithra
7 Carmel Higher Secondary School Kiran
8 Carmel Higher Secondary School Vaishnavi
9 Joseph Convent School Meera
10 Hindu School Anushya
11 Atomic Energy Central School Durgesh
12 Atomic Energy Central School Hanirhan RS

Activate Windows Go-to-Settings-to-activate-Windows...

New Schools with Students Report :

New Schools with Students Report

Total Records 56

	School: School Name	Student: Student Name
1	Christian Welfare High school	Tanya
2	Christian Welfare High school	Anisha
3	Atomic Energy Central School	Rithu
4	Joseph Convent School	Ram
5	Hindu School	Rajesh
6	Hindu School	Pavithra
7	Carmel Higher Secondary School	Kiran
8	Carmel Higher Secondary School	Vaishnavi
9	Joseph Convent School	Meera
10	Hindu School	Anushya

Activate Windows Go-to-Settings-to-activate-Windows...

New Parents Report :

New Parents Report

Total Records 7

	Parent: Parent Name
1	Maninder
2	Veluswamy
3	Rahul
4	Karupaswamy
5	Ramesh
6	Selvan
7	Thamilselvan

Activate Windows Go-to-Settings-to-activate-Windows...

Dashboard and results obtained .

New Schools with Students Report

School: School Name ↑	Student: Student Name
Atomic Energy Central School	Rithu
Atomic Energy Central School	Durgesh
Atomic Energy Central School	Hariharan RS
Atomic Energy Central School	Priyanka
Atomic Energy Central School	Aswin
Atomic Energy Central School	Muthukumaran E
Atomic Energy Central School	Shailu

View Report ([New Schools with Students Report](#))

New Parents Report

Parent: Parent Name ↑	Activate Windows Go to Settings to activate Windows.
Karupaswamy	
Maninder	

Search the web and Windows 1:30 AM 4/11/2023

4 Trailhead Profile Public URL

- Team Lead – <https://trailblazer.me/id/muthe3>**
Team Member 1 – <https://trailblazer.me/id/esakm3>
Team Member 2- <https://trailblazer.me/id/mathm26>
Team Member 3- <https://trailblazer.me/id/mathm25>
Team Member 4 - <https://trailblazer.me/id/jjoselin1>

5 ADVANTAGES & DISADVANTAGES

Advantages :-

- It is very easy for handling as it is build in easy understandable and access manner .
- It helps teachers to focus on there primary activity of proving high quality education.
- It will bring on everyone together and create a good relationship.
- It will be very easier for everyone to access the needed information at any place.
- It is so safe and secured to use.
- It will reduce time consumptions.

Disadvantages:-

- Everyone won't have more awareness and know about the features in mobile as for example parents who are uneducated.
- There can be chances of misprint of marks or wrong marks by chance.
- There is always a fear of personal details being secured or not.
- There should maximum care while entering the details small change in the personal details can created more problematic of childrens future.
- It might look somewhat costlier.

6 APPLICATIONS

- School
- College
- Educational Institutions
- Labs
- Library
- Hospitals
- Medical Research Sectors

7 CONCLUSION

This application was very informative .This application is giving us all the detailed account of schools ,students and parents . This application helps to the betterment of the individuals performance in academics.This application is very simple and secured and well designed. It should be widely used in every fields.

8 FUTURE SCOPE

In Future , it will be made compulsory as for every schools to have and work on customer relationship management . It will provide more additional and standard feature as of every activity of the individuals performance in various fields and being listed and tracked .Update of the students medical reports are being are also be noted and tracked on. It will be widely applicable in every fields.