

1. INTRODUCTION

1.1.OVERVIEW:

Under the scheme of Naan mudhalvaan we had done a salesforce project in the field of the customer relationship management for the application of schools and colleges. In this project we had done one empathy map , brainstorm and idea prioritization and creation of an application for school management.

1.2.PURPOSE:

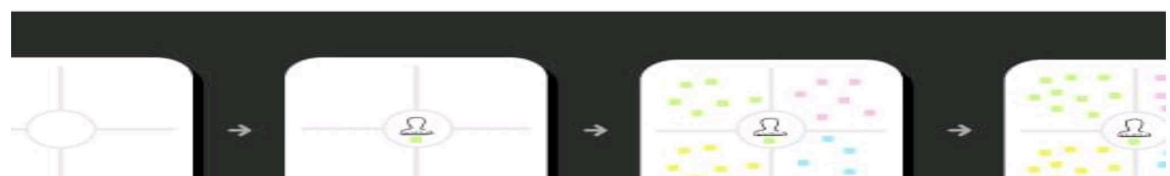
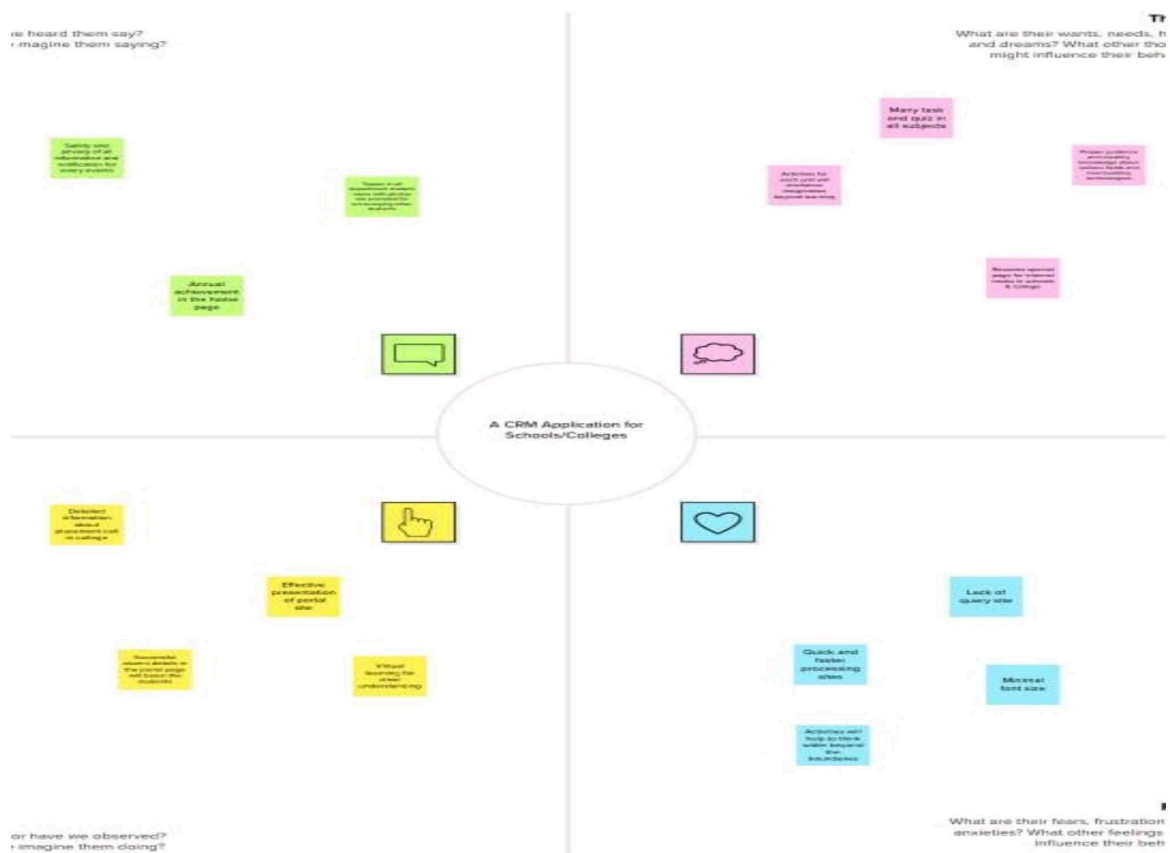
This project aims to provide a real-time knowledge to the students about salesforce. This project will also help those professionals who are in cross-technology and want to switch to salesforce. With the help of this project we gained the knowledge about salesforce and can include it in our resume as well.

2.PROBLEM DEFINITION AND DEFINE THINKING:

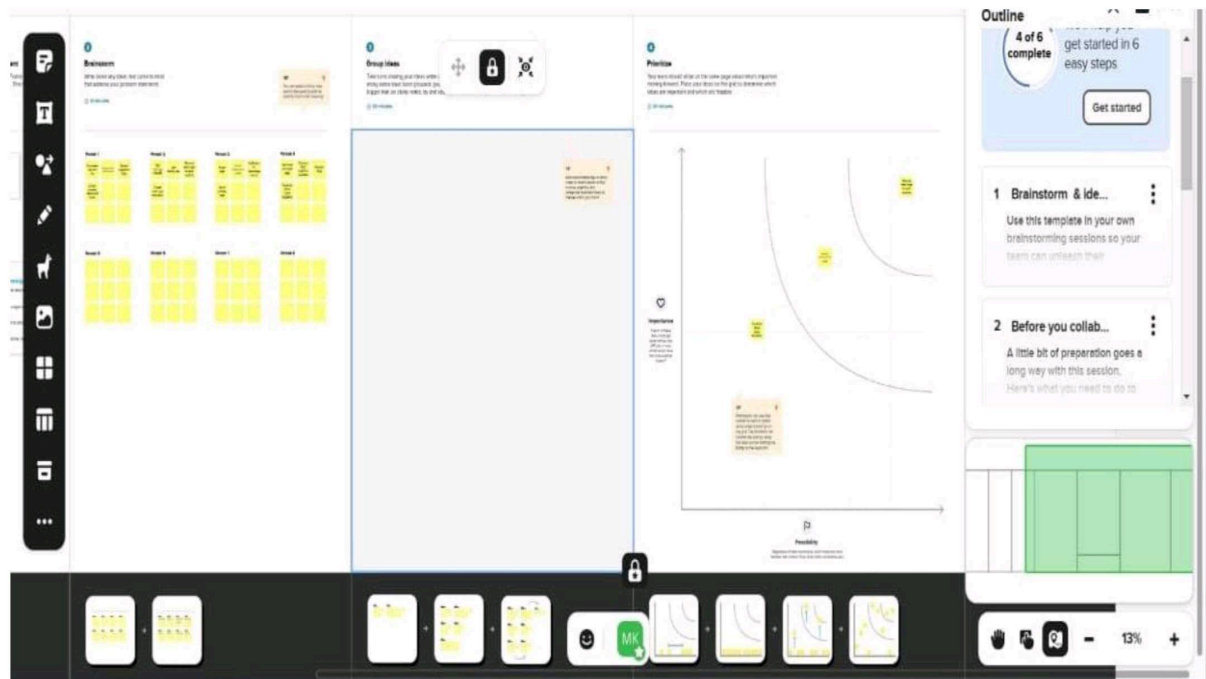
2.1.EMPATHY MAP:

Empathy

Information you add here should be representative of the findings and research you've done about your users.



2.2.IDEATION & BRAINSTORMING MAP



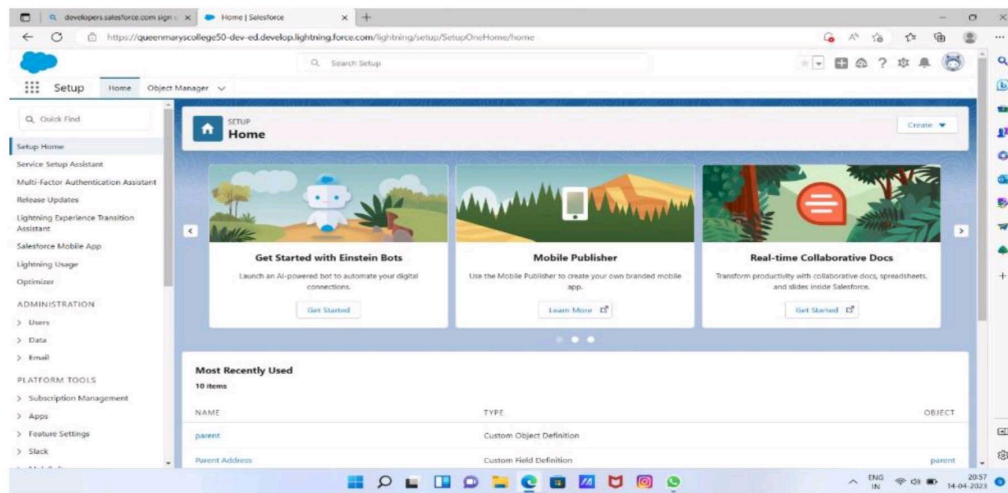
3.RESULT:

3.1.DATA MODEL:

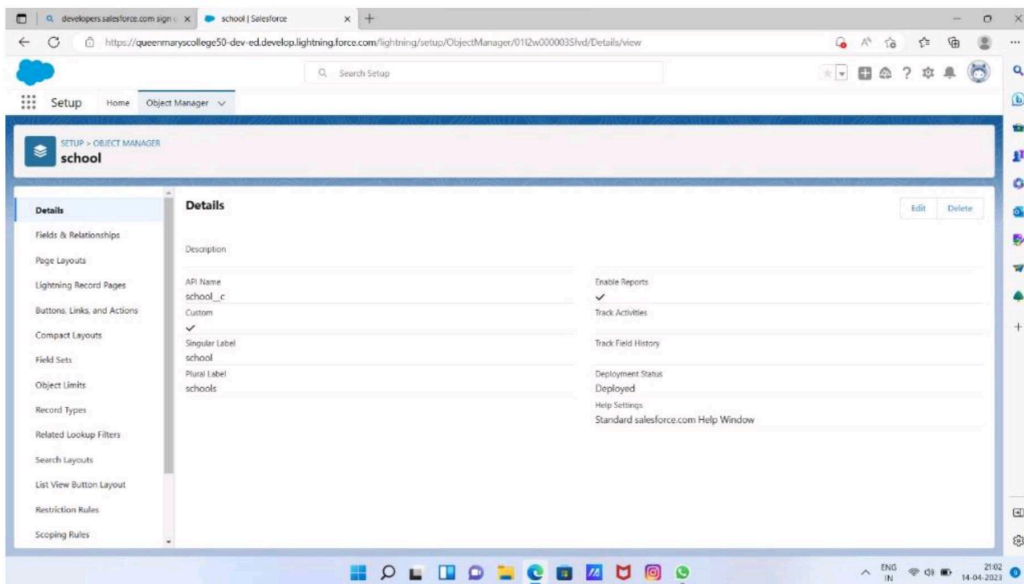
OBJECT NAME	FIELDS IN THE OBJECT	
1. SCHOOL	FIELD LABEL	DATA TYPE
	ADDRESS	ADDRESS
	DISTRICT	TEXT AREA
	STATE	TEXT AREA
	SCHOOL	TEXT AREA
	PHONE NUMBER	PHONE
	NUMBER OF STUDENTS	ROLL – UP SUMMARY
	HIGHEST MARKS	ROLL - UP SUMMARY
2. STUDENTS	FIELD LABEL	DATA TYPE
	PHONE NUMBER	PHONE
	SCHOOL	MASTER DETAIL RELATIONSHIP
	RESULTS	PICKLIST
	CLASS	NUMBER
	MARKS	NUMBER
3. PARENT	FIELD LABEL	DATA TYPE
	PARENT ADDRESS	TEXT AREA
	PARENT NUMBER	PHONE

3.2. ACTIVITY AND SCREENSHOT:

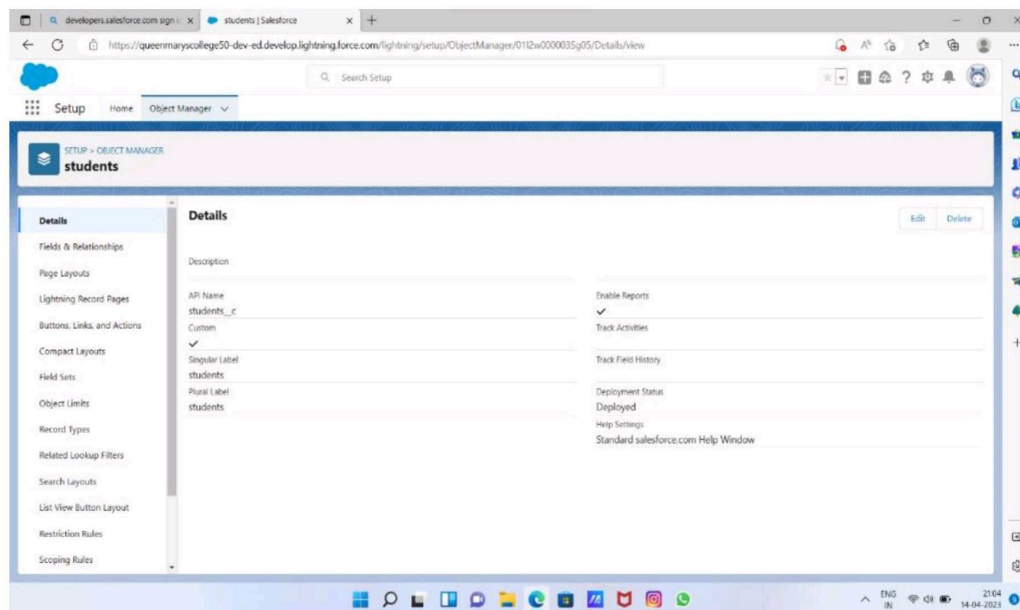
MILESTONE 1:



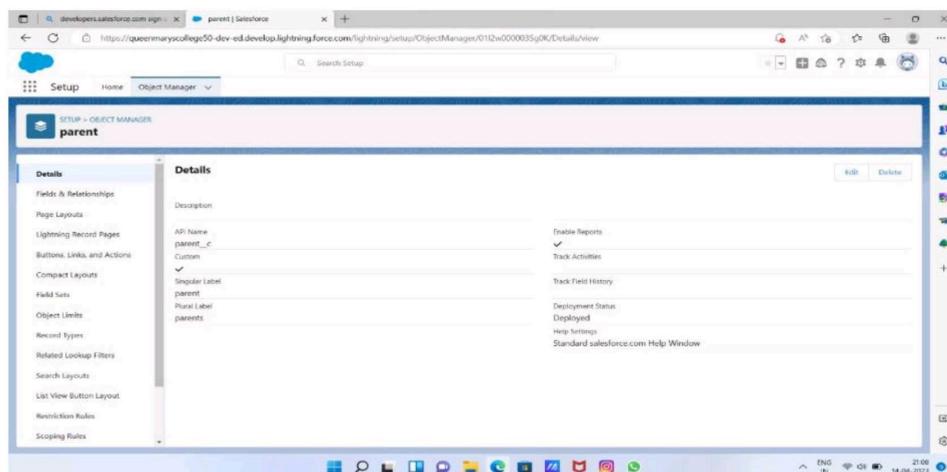
MILESTONE 2 ACTIVITY 1:



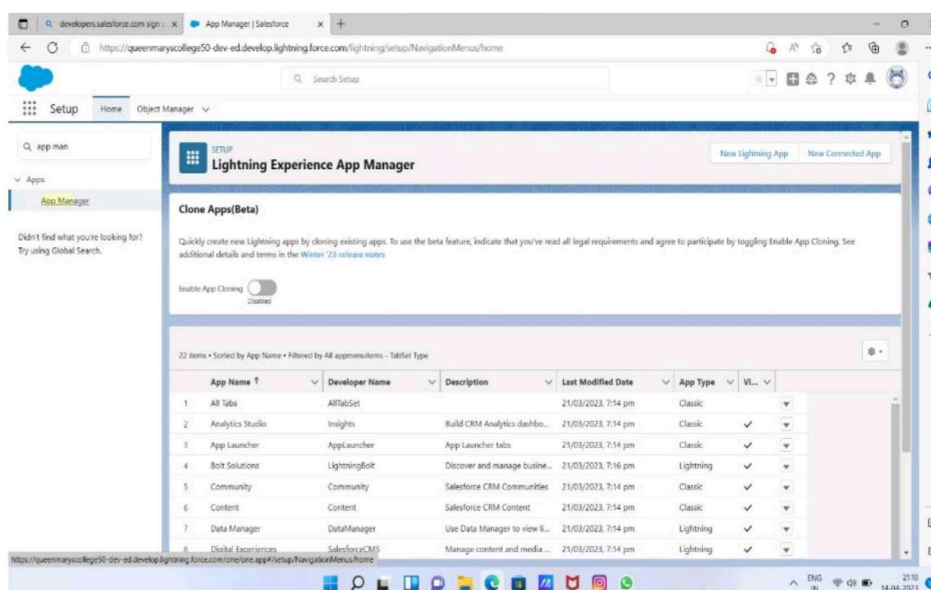
MILESTONE 2 ACTIVITY 2



MILESTONE 2 ACTIVITY 3



MILESTONE 3



MILESTONE 4 ACTIVITY 1

The screenshot shows the Salesforce Object Manager interface for the 'school' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of 6 fields, 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)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX students)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT students)		
Owner	OwnerId	Lookup(User/Group)		✓
school Name	Name	Text(80)		✓

MILESTONE 4 ACTIVITY 2

The screenshot shows the Salesforce Object Manager interface for the 'students' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of 13 fields, 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
Address	Address__c	Text Area(255)		
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(school)		✓
School websites	School_websites__c	Text Area(255)		

MILESTONE 4 ACTIVITY 3

The screenshot shows the Salesforce Setup interface for the 'parent' object. The 'Fields & Relationships' tab is selected, displaying a list of 6 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

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(90)		✓
Parent Number	Parent_Number__c	Phone		

MILESTONE 5

The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The 'Profiles' tab is selected, displaying a list of profiles. The table below represents the data shown in the screenshot:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Delete	school profile	Analytics Cloud Integration User	✓
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	
<input type="checkbox"/> Edit Delete	Custom Marketing Profile	Salesforce	✓
<input type="checkbox"/> Edit Delete	Custom Sales Profile	Salesforce	✓
<input type="checkbox"/> Edit Delete	Custom Support Profile	Salesforce	✓
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	

MILESTONE 6

SETUP 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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A. Admin	AA	teachers@4.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	A. PAVITHRA	PA	pavithra@queennmancollege.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.002w00000pdyecaj.1hawys2ah00@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Sande Sanjay	San	sarants@4.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	J. Saritha	si	principals@7.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	User: Integration	integ	Integration@00u2w000000djecaj.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User: Security	sec	securitysecurity@00u2w000000djecaj.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

MILESTONE 7

SETUP Permission Sets

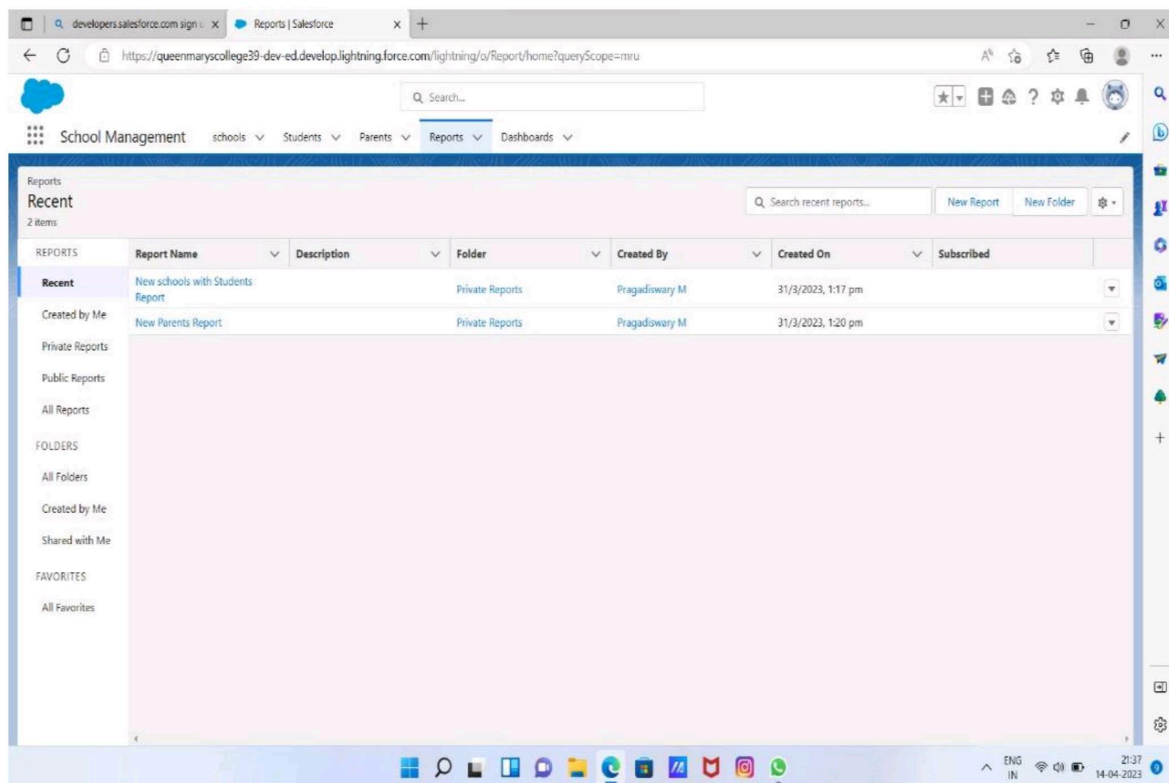
On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate S...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	Security Center Integration User	Access Security Center for integration	Cloud Integration User
<input type="checkbox"/> Clone	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
<input type="checkbox"/> Clone	Shopify	Allow access to Shopify Commerce features.	Commerce User
<input type="checkbox"/> Clone	Stack Service User	Lets users run the flows for swimming with Service Cloud for Slack.	Stack Service User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/> Clone	Subscription Management Collections Dashboard User	Gives users visibility into collection status in a given timeframe. Man...	Analytics View Only Embedded App

1-9 of 9 | 0 Selected | [Previous](#) | [Next](#) | Page 1 of 1

MILESTONE 8



4. TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD: <https://trailblazer.me/id/pavithra290603>

TEAM MEMBER 1: <https://trailblazer.me/id/mohak56>

TEAM MEMBER 2: <https://trailblazer.me/id/monikasg210103>

TEAM MEMBER 3: <https://trailblazer.me/id/pragathi05>

5. ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

- We had learned the new things which helps to add in our resume as well.
- In the empathy map, we think a lot to complete the tasks.
- We also learned the softskills i.e., Team work, Group discussion, Leadership quality etc...
- Chat with mentor option helps a lot to complete these project.

DISADVANTAGES:

- In the brainstorming and ideation we faced a lots of difficulties i.e., Its has only two trials.
- In the project procedure especially in the milestone 4 rolls up summary given was unordered i.e., Master detail relationship was given after the roll up summary.

6. APPLICATIONS:

- Real time salesforce project
- CRM Platform and also a centralized platform for managing customer accounts , sales leads , activities , customer support cases .
- Salesforce is a massive infrastructure of customer relationship management software products that helps marketing , sales , commerce , service and IT teams connect with their customers.

7.CONCLUSION:

This project enhance us to learn a lot and will definitely helps in the future.

8. FUTURE SCOPE:

This works enhance a better relationship between a customer and the sales which further helps in the development and increases the rate of profit for the companies and industries.