

PROJECT REPORT

CRM APPLICATION FOR SCHOOL & COLLEGE

1. INTRODUCTION

1.1 Overview:

"This program enables a student to know about the educational facilities and college features as per his choice".

1.2 Purpose:

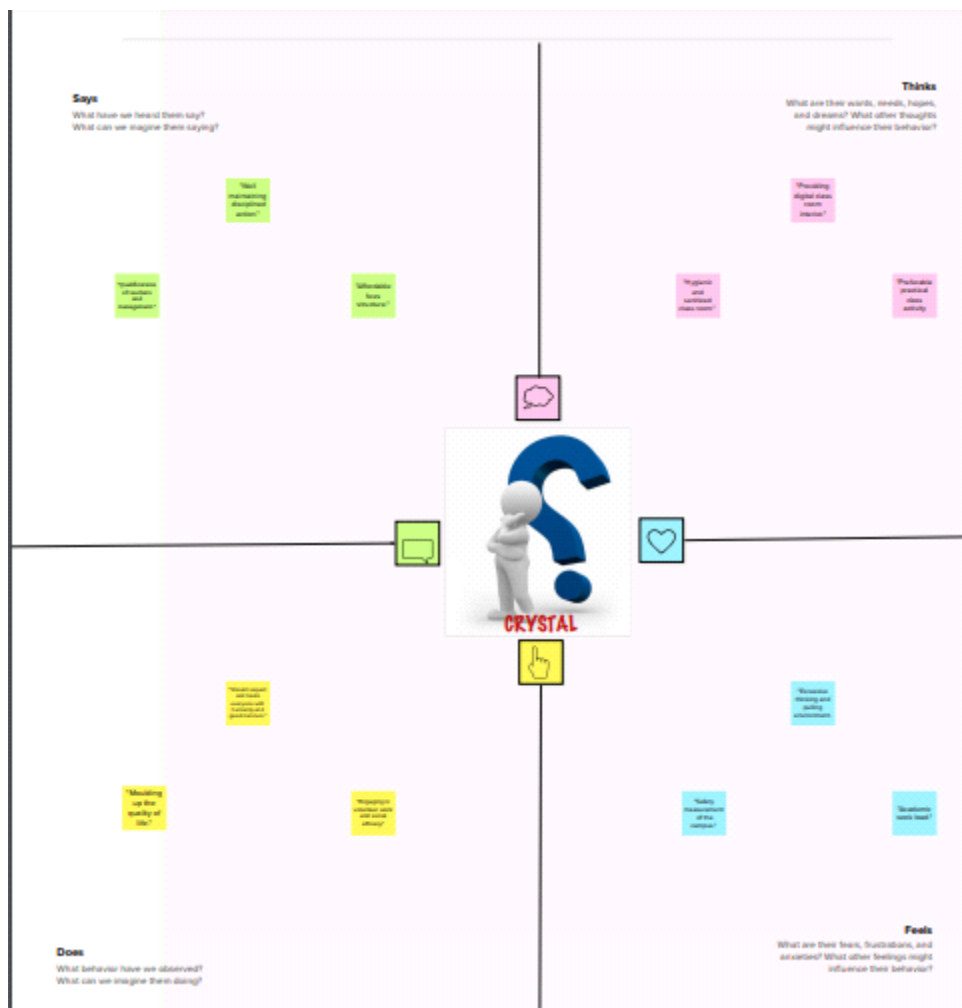
1."You can know the complete information of a educational institution".

2."You can find information about the fee details of a educational institution".

3."One can know the complete guidelines for the training capacity of an educational institution".

2. Problem Definition & Design Thinking

2.1 Empathy Map



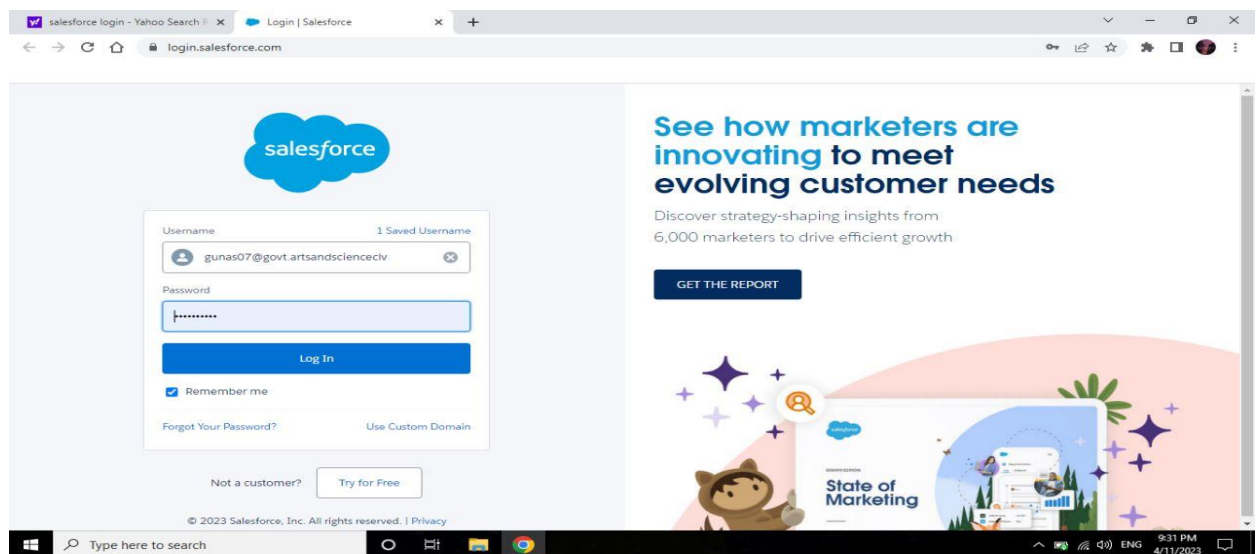
[illegible]

Object name	Fields in the Object	
School		
	Field label	Data type
	Address	Text Area(255)
	District	Text Area(255)
	Highest Marks	Roll-up summary
	No.of.students	Roll-up summary
	Phone number	Phone
	School	Text Area
	State	Text Area
	School name	Text

Student	Field label	Data type
	Class	Number
	Enter result	Look up
	Marks	Number
	Parent address	Text Area
	Parent number	Phone
	Phone number	Phone
	School	Master-Detail
	Student name	Text
Parent	Field Label	Data type
	Parent name	Text

3.2 Activity & Screenshot

Milestone 1: Salesforce



Milestone 2: Object

This screenshot shows the Salesforce Object Manager interface for an object named 'school'. The browser address bar displays the URL: `govtartsandsciencecollege83-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cKGV/Details/view`. The page header includes the Salesforce logo, a search bar, and navigation links for Setup, Home, and 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, and Related Lookup Filters. The main content area, titled 'Details', contains the following information:

Details	
Description	
API Name	ABCSchool__c
Custom	<input checked="" type="checkbox"/>
Singular Label	school
Plural Label	schools
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the screen shows the Windows taskbar with the search bar and system tray.

This screenshot shows the Salesforce Object Manager interface for an object named 'Student'. The browser address bar displays the URL: `govtartsandsciencecollege83-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cKGI/Details/view`. The page header includes the Salesforce logo, a search bar, and navigation links for Setup, Home, and 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, and Related Lookup Filters. The main content area, titled 'Details', contains the following information:

Details	
Description	
API Name	ABCStudent__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Student
Plural Label	Students
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the screen shows the Windows taskbar with the search bar and system tray.

salesforce login - Yahoo Search | Parent | Salesforce

govtartsandsciencecollege83-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cKGu/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Parent

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Details

Description

API Name
ABCParent__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

Edit Delete

javascript:void(0);

Type here to search

9:35 PM
4/11/2023

salesforce login - Yahoo Search | Tabs | Salesforce | Custom Tabs - Salesforce | SCHOOLS WITH STUDENTS | Home | Salesforce

govtartsandsciencecollege83-dev-ed.develop.my.salesforce.com/setup/ui/customtabs.jsp?setupid=CustomTabs&apLayout=setup&noS1Redirect=true

Switch to Lightning Experience GUNASUNDHARI S Setup Help Content

Home Chatter Libraries Content Subscriptions schools Parents Students

Quick Find / Search... Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce
Get Started

Salesforce Mobile Quick Start

Home

Administrator
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What is This?

Action	Label	Tab Style	Description
Edit Del	Parents	Boat	
Edit Del	schools	Boat	
Edit Del	Students	Boat	

Web Tabs

New What is This?

No Web Tabs have been defined

Visualforce Tabs

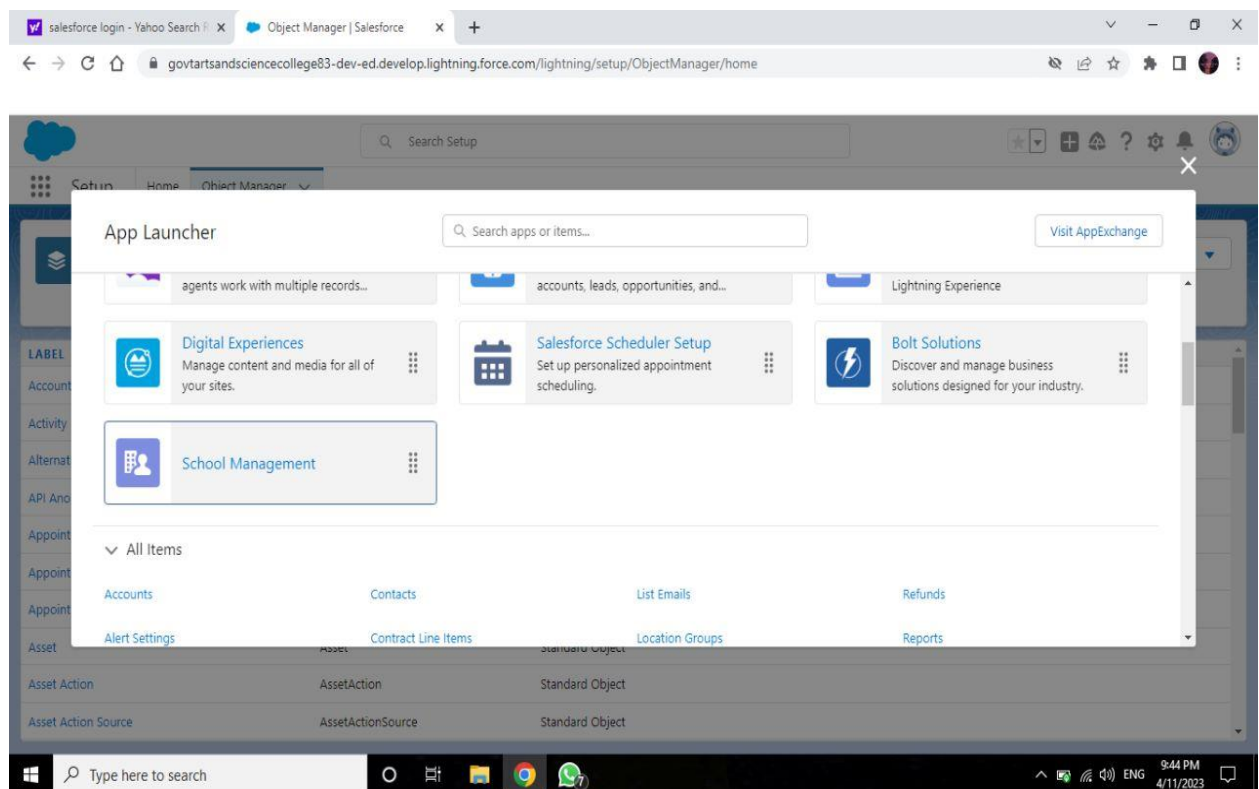
New What is This?

No Visualforce Tabs have been defined

Type here to search

10:09 PM
4/11/2023

Milestone-3: Lightning App



Milestone-4:Fields & Relationship

salesforce login - Yahoo Search | school | Salesforce

govtartsandsciencecollege83-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cKGV/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
school

Details

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number Of Students	Number_Of_Students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

9:46 PM 4/11/2023

salesforce login - Yahoo Search | school | Salesforce

govtartsandsciencecollege83-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cKGV/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
school

Details

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number Of Students	Number_Of_Students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
school	school__c	Text Area(255)		
school Name	Name	Text(80)		✓
State	State__c	Text Area(255)		

Type here to search

9:47 PM 4/11/2023

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Enter Results	Enter_Results__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Parent Address	Parent_Address__c	Text Area(255)		
Parent Number	Parent_Number__c	Phone		

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Marks	Marks__c	Number(18, 0)		
Parent Address	Parent_Address__c	Text Area(255)		
Parent Number	Parent_Number__c	Phone		
Phone Number	Phone_Number__c	Phone		
Record Type	RecordTypeId	Record Type		✓
school	school__c	Master-Detail(school)		✓
Students Name	Name	Text(80)		✓

The screenshot shows the Salesforce Object Manager setup page for the 'Parent' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Parent Name	Name	Text(80)		✓

Milestone-5:Profile

The screenshot shows the Salesforce Profile setup page for the 'School Profile'. The left sidebar contains navigation links: Home, Chatter, Libraries, Content, Subscriptions, schools, Parents, Students, and a search bar. The main content area is titled 'Profile' and shows the 'School Profile' details. The profile is a Custom Profile, created by GUNASUNDHARI S. on 02/04/2023, 12:05 pm, and modified by GUNASUNDHARI S. on 03/04/2023, 5:52 pm. The page layouts section shows the following assignments:

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

Milestone-6:Users

salesforce login - Yahoo Search | Profiles | Salesforce | Active Users ~ Salesforce - Dev |

govtartsandsciencecollege83-dev-ed.develop.my.salesforce.com/0057isUserEntityOverride=1&retURL=%2Fui%2Fsetup%2FSetup%3FSetupid%3DUsers&setup...

Active 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: **Active Users** | Edit | Create New View

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 | **All**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d2w00000r95lear.2i4diak3fz@chatter.salesforce.com		✓	Chatter Free User
<input checked="" type="checkbox"/> Edit	P	PS	principlalsco@govt.artsandscienceclg		✓	Standard Platform User
<input checked="" type="checkbox"/> Edit	S	GS	sundhar10@govt.artsandscienceclg		✓	School Profile
<input checked="" type="checkbox"/> Edit	S. GUNASUNDHARI	GS	gunas07@govt.artsandscienceclg		✓	System Administrator
<input checked="" type="checkbox"/> Edit	I	TS	teachersco@govt.artsandscienceclg		✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration00d2w00000r95lear.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w00000r95lear.com		✓	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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 | **All**

salesforce login - Yahoo Search | Profiles | Salesforce | User: GUNASUNDHARI S ~ Sales |

govtartsandsciencecollege83-dev-ed.develop.my.salesforce.com/0052w00000G6jA6?noredirect=1&isUserEntityOverride=1

User Detail

Edit | Sharing | Change Password

Name	Role
GUNASUNDHARI S	System Administrator

Alias	User License
GS	Salesforce

Email	Profile
gunasundharis1010@gmail.com	System Administrator

Username	Active
gunas07@govt.artsandscienceclg	✓

Nickname	Marketing User
User16800660780156872539	✓

Title	Offline User
	✓

Company	Knowledge User
GOVT. ARTS AND SCIENCE COLLEGE, VEPPANTHATTAI.	<input type="checkbox"/>

Department	Flow User
	<input type="checkbox"/>

Division	Service Cloud User
	✓

Address	Site.com Contributor User
IN	<input type="checkbox"/>

Time Zone	Site.com Publisher User
(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>

Locale	WDC User
English (India)	<input type="checkbox"/>

Language	Mobile Push Registrations
English	View

Delegated Approver	Data.com User Type
	i

Manager	Accessibility Mode (Classic Only)
	<input type="checkbox"/> i

Receive Approval Request Emails	Debug Mode
Only if I am an approver	<input type="checkbox"/> i

Federation ID	High-Contrast Palette on Charts
	<input type="checkbox"/> i

App Registration: One-Time Password Authenticator	Load Lightning Pages While Scrolling
iConnect i	✓ i

App Registration: Salesforce Authenticator	Send Apex Warning Emails
iConnect i	<input type="checkbox"/>

salesforce login - Yahoo Search | Profiles | Salesforce | User: GUNASUNDHARI S ~ Sales

govtartsandsciencecollege83-dev-ed.develop.my.salesforce.com/0052w00000G6jA6?noredirect=1&isUserEntityOverride=1

Public Groups
Queues
Login History
Identity Provider Event Log
Identity Verification History

Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration

Build
Customize
Create
Develop
Lightning Bolt
Schema Builder

App Registration: Salesforce Authenticator [\[Connect\]](#)
Security Key (U2F or WebAuthn) [\[i\]](#)
Lightning Login [\[Enroll\]](#)
Temporary Verification Code (Expires in 1 to 24 Hours) [\[Generate\]](#)

Send Apex warning emails
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts
Receive Salesforce CRM Content Alerts as Daily Digest
Make Setup My Default Landing Page
Quick Access Menu
Development Mode
Show View State in Development Mode
Cache Diagnostics
Allow Forecasting
Call Center
Phone
Extension
Fax
Mobile [\[Add\]](#)
Email Encoding Unicode (UTF-8)
Employee Number
Start of day 6:00 am
End of day 11:00 pm
Used Data Space 288 KB [\[View\]](#)
Used File Space 0 B [\[View\]](#)
Last Login 11/04/2023, 9:33 pm
Last Password Change or Reset 29/03/2023, 10:39 am
Failed Login Attempts 0 [\[i\]](#)
Individual
Created By GUNASUNDHARI S, 29/03/2023, 10:31 am
Modified By GUNASUNDHARI S, 03/04/2023, 10:24 am

Milestone-7:Permission Sets

salesforce login - Yahoo Search | Profiles | Salesforce | Permission Set: Principal Permis...

govtartsandsciencecollege83-dev-ed.develop.my.salesforce.com/0PS2w000008zpEj

Quick Find / Search...
Expand All / Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home

Administer
Release Updates
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Permission Set Groups
User Management Settings
Profiles
Public Groups

Permission Set
Principal Permission
Find Settings... [Clone](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview

Description	API Name Principal_Permission
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By GUNASUNDHARI S, 02/04/2023, 1:38 pm
Last Modified By GUNASUNDHARI S, 03/04/2023, 10:54 am	

Apps
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

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
Flow Access
Permissions to execute Flows

Milestone-8:Reports

The screenshot shows the Salesforce Reports interface. The browser address bar indicates the URL: `govtartsandsciencecollege83-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru&0.source=alohaHeader`. The page title is 'School Management'. The 'Reports' tab is selected in the navigation bar. The 'Recent' reports list shows two items:

Report Name	Description	Folder	Created By	Created On	Su...
SCHOOLS WITH STUDENTS AND PARENT REPORT	to know student status	Public Reports	GUNASUNDHARI S	4/4/2023, 7:14 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	29/3/2023, 10:31 am	

The screenshot shows the 'SCHOOLS WITH STUDENTS AND PARENT REPORT' in the Salesforce Reports interface. The report title is 'SCHOOLS WITH STUDENTS AND PARENT REPORT' with the subtitle 'to know student status'. The report displays a table of statistics and a bar chart titled 'MARKS STATUS'.

Total Records	Total Marks	Average Marks	Maximum Marks	Minimum Marks	Median Marks
4	382	96	98	92	96

The bar chart 'MARKS STATUS' shows the 'Sum of Marks' (382) as a blue bar. The Y-axis is labeled 'Sum of Marks' and ranges from 0 to 400. The X-axis is labeled 'MARKS STATUS'. The legend indicates 'Sum of Marks' (blue bar) and 'Average Marks' (black line).

Report: schools with Students
SCHOOLS WITH STUDENTS AND PARENT REPORT
to know student status

Enable Field Editing

Highest Marks

Highest Marks	school	school: ID	Student: Students Name	Student: ID	Phone Number	Student: Record Type	Class	Marks	Enter Results	Parent
98 (4)	GOVT KID SCHL	a012w000018qNku	ARUNKUMAR	a022w00000o1Byp	9933667285	master	12	98	PASS	
	GOVT KID SCHL	a012w000018qNku	ADHIRAJ	a022w00000o1Byq	9626374472	master	12	97	PASS	
	GOVT KID SCHL	a012w000018qNku	SUMAN	a022w00000o1Byr	9466772283	master	12	95	PASS	
	GOVT KID SCHL	a012w000018qNku	VAIBAV	a022w00000o1CMN	8544602619	master	12	92	PASS	
Subtotal								382 Avg: 96 Max: 98 Min: 92 Median: 96		
Total (4)								382 Avg: 96 Max: 98 Min: 92 Median: 96		

Row Counts Detail Rows Subtotals Grand Total

Report: schools with Students
SCHOOLS WITH STUDENTS AND PARENT REPORT
to know student status

Enable Field Editing

Highest Marks	Student: Record Type	Class	Marks	Enter Results	Parent Number	Parent Address	Student: Created Alias	Student: Created Date
98 (4)	master	12	98	PASS	9871235674	KALLAKURICHI,TAMILNADU,INDIA	GS	04/04/2023
	master	12	97	PASS	9787121865	DHURUGAM,TAMILNADU,INDIA	GS	04/04/2023
	master	12	95	PASS	8611473021	ALATHUR,KALLAKURICHI,TAMILNADU,INDIA	GS	04/04/2023
	master	12	92	PASS	8098951680	KALLAI,TAMILNADU,INDIA	GS	04/04/2023
Subtotal			382 Avg: 96 Max: 98 Min: 92 Median: 96					
Total (4)			382 Avg: 96 Max: 98 Min: 92 Median: 96					

Row Counts Detail Rows Subtotals Grand Total

4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/bala65>

Team Member 1 - <https://trailblazer.me/id/gunas07>

Team Member 2 - <https://trailblazer.me/id/bhuvi1>

Team Member 3 - <https://trailblazer.me/id/aanitha35>

Team Member 4 – <https://trailblazer.me/id/vtamil10>

5. ADVANTAGES & DISADVANTAGE

ADVANTAGE	DISADVANTAGE
“Customer accounting and complete information about the relationship with them;	“ Security issues”.
“Schedule of classes and information on the educational process, by student;	“Third Party Access”.
“Personal accounts of students and teachers with the ability to upload homework and receive feedback;	“The excess initial time and productivity cost of implementation”.

6. APPLICATION

- Get more enrollments a cost that makes sense
- Grow your student numbers predictably and reliably
- Less management no headaches
- Fees structures

7. CONCLUSION

- **At lost, I would like to share my experience while doing this project**
- **This project is school and college management is designed mainly for the purpose of managing all activities like admission, student performance etc ...**

8. FUTURE SCOPE

- **The future of CRM is about which companies will be able to pivot to meet the changing needs trends-driven by customer expectations.**
- **Customers expect organizations to know a lot about them and expect to have conversations.**