

## **1. INTRODUCTION**

### Overview

The project aim is to provide real time knowledge for all this students who have basic knowledge of salesforce and looking for real time project.

### Purpose

The project helps to maintain and manage the school related problems which further can be modified based on the requirements.

## **2. Problem Definition & Design Thinking**

### Empathy Map



## Empathy map

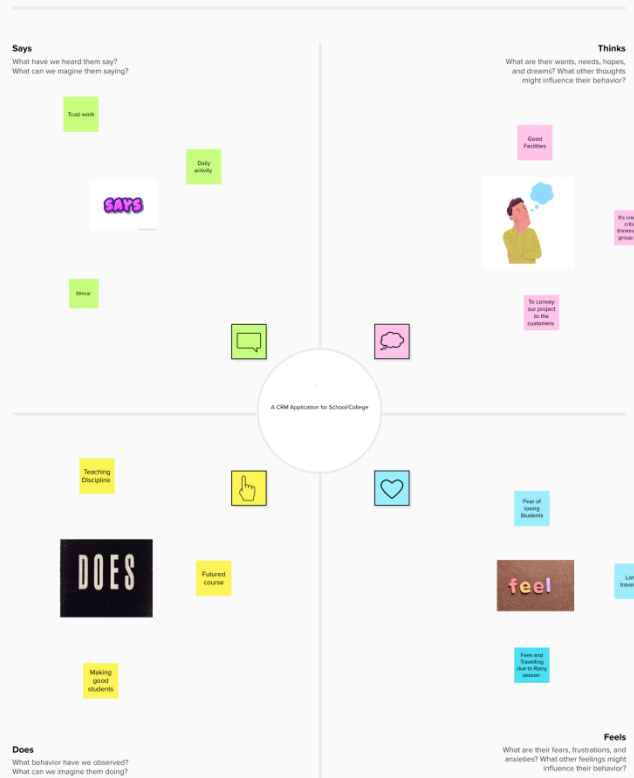
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

1

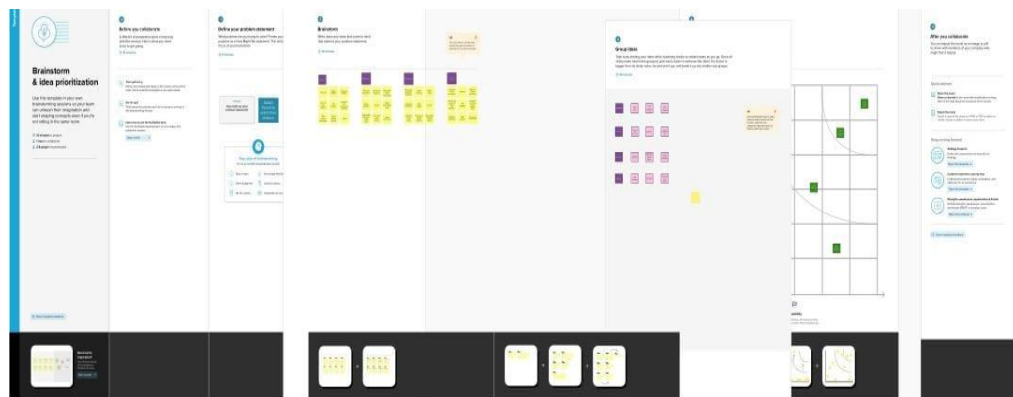
### Build empathy

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



**Need some inspiration?**  
See a finished version of this template to kickstart your work.

[Open example](#)

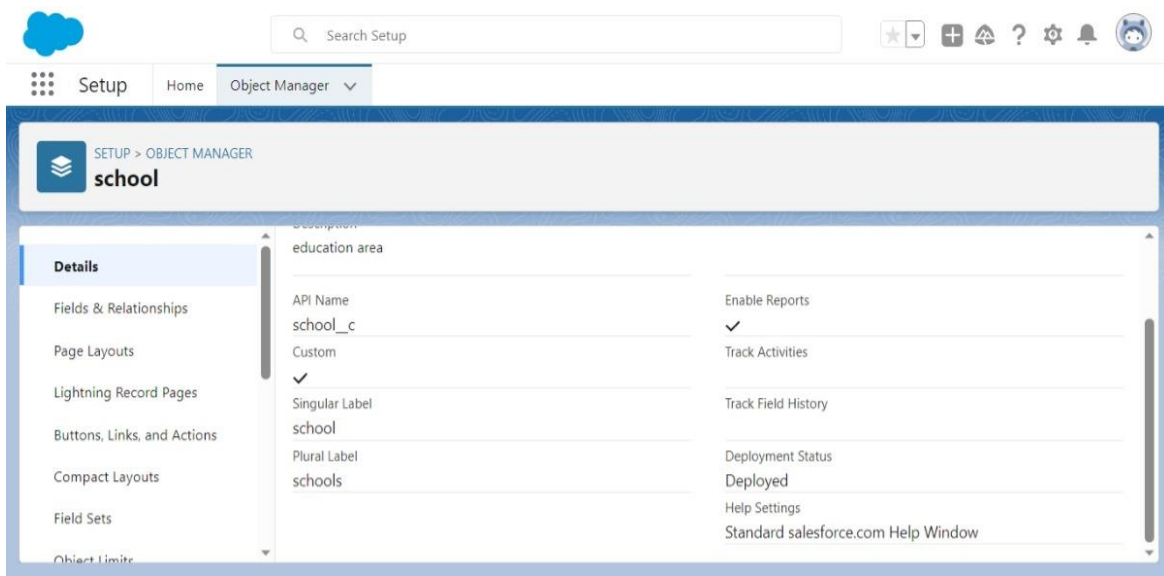


# Project Report Template


Data Model:








Object name	Fields in the Object	
Object School	Field label	Data type
	Address	Text Area
	District	Text Area
	State	Text Area
	Phone Number	Phone
	No.of Students	Roll up Summary
	Highest Mark	Roll up Summary
Object Student	label	Data type
	Phone	Phone Number
	Results	Picklist
	Class	Number
Object Parent	Field label	Data type
	Parent Address	Text Area
	Parent Number	Phone


## Activity & Screenshot



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' (selected). Below the navigation bar, the page title is 'SETUP > OBJECT MANAGER school'. The main content area is divided into two columns. The left column contains a sidebar with 'Details' selected, listing options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', and 'Object Limits'. The right column displays the configuration for the 'school' object, including 'API Name' (school\_c), 'Custom' (checked), 'Singular Label' (school), 'Plural Label' (schools), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'.





**Setup**

Home

Object Manager



SETUP > OBJECT MANAGER

**student**

**Details**

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

**Details**

Description

study

API Name

student\_\_c

Custom

✓

Singular Label

student

Enable Reports


✓








Track Activities


Track Field History

Edit

Delete





**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

**Details**

Description

API Name

Parent\_\_c

Custom

✓

Singular Label

Parent

Plural Label

Enable Reports

✓


Track Activities








Track Field History


Deployment Status

Edit

Delete




**School Management**

schools

Parents


Reports

Dashboards

Accounts

Appointment Invitations

More



schools







**Recently Viewed**

New

Import

Change Owner

0 items • Updated a few seconds ago

☐

school Name

You haven't viewed any schools recently.

Try switching list views.

The first screenshot shows a 'New School' form with the following fields:

- School
- Phone Number
- Number of students
- Highest Mark

The second screenshot shows a 'New Parent' form with the following fields:

- Parent Name
- Parent Address
- Parent Number
- Owner (Praveena Mani)

The third screenshot shows a 'New schools with students Report' page with a 'No Results' message and a cactus illustration.

#### 4. Trailhead Profile Public URL

Team Lead <https://trailblazer.me/id/pmani202>

Team Member 1 -

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



## 5. **ADVANTAGES**

Huge amount of data on customer interactions.

It can speed up the sales conversion process.

It increases staff productivity, lowers time costs and boosts morale.

## **DISADVANTAGES**

Security concerns associated with centralized data.

It requires a process driven sales

Not suitable for every business

It eliminates the human element.

## **APPLICATIONS**

Identify and engage the right customers.

Tracking Customers.

Collecting data for Marketing.

Interactions and communications.

## 6. **CONCLUSION**

It clearly defines the customer relationship management about the school and college.

## 7. **FUTURE SCOPE**

Traditionally and essentially CRM is management software for sales, marketing and customer service teams as they are the major touchpoints for any customer contact strategy.