

# **A CRM APPLICATIONS FOR SCHOOLS AND COLLEGES**

## **PROJECT REPORT TEMPLATE**

### **1.Introduction :**

#### **1.1 OVERVIEW:**

**The project aim is to provide real-time knowledge for all the students who have basic knowledge of sales force and looking for real time project.**

**This project will also help professionals who are in cross-technology and want to switch to sales force.**

#### **1.2PURPOSE:**

- 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 Applications for Schools and College.**
- This project helps us to understand the customer relationships, makes us to understand the customer “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:**

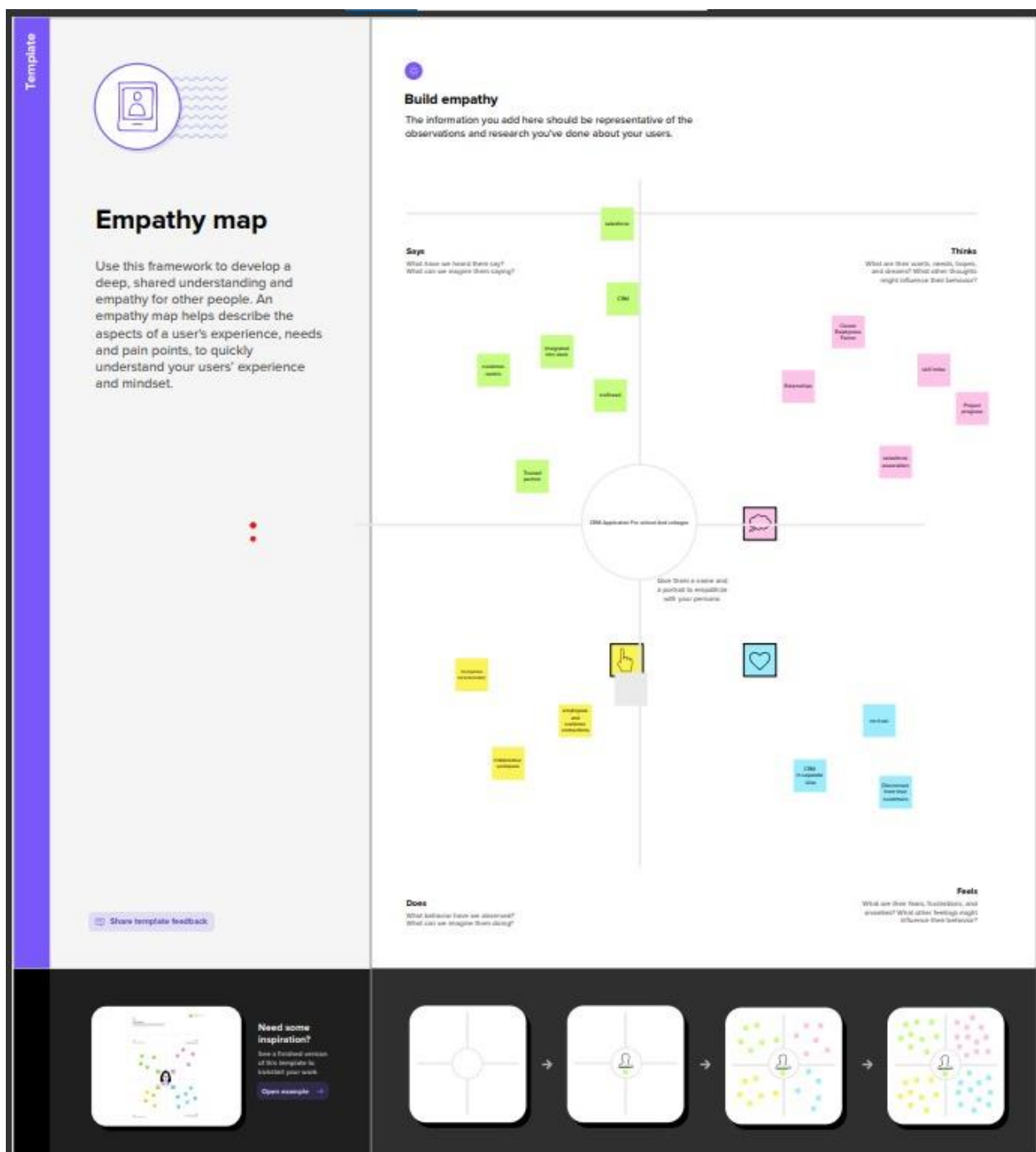
Design thinking involves five steps:

- 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 team 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 goals and challenges.



## Pasting the ideation & brainstorming Map screenshot



### **3.1 DATA MODEL:**

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

### **3.2 ACTIVITY & SCREENSHOTS:**

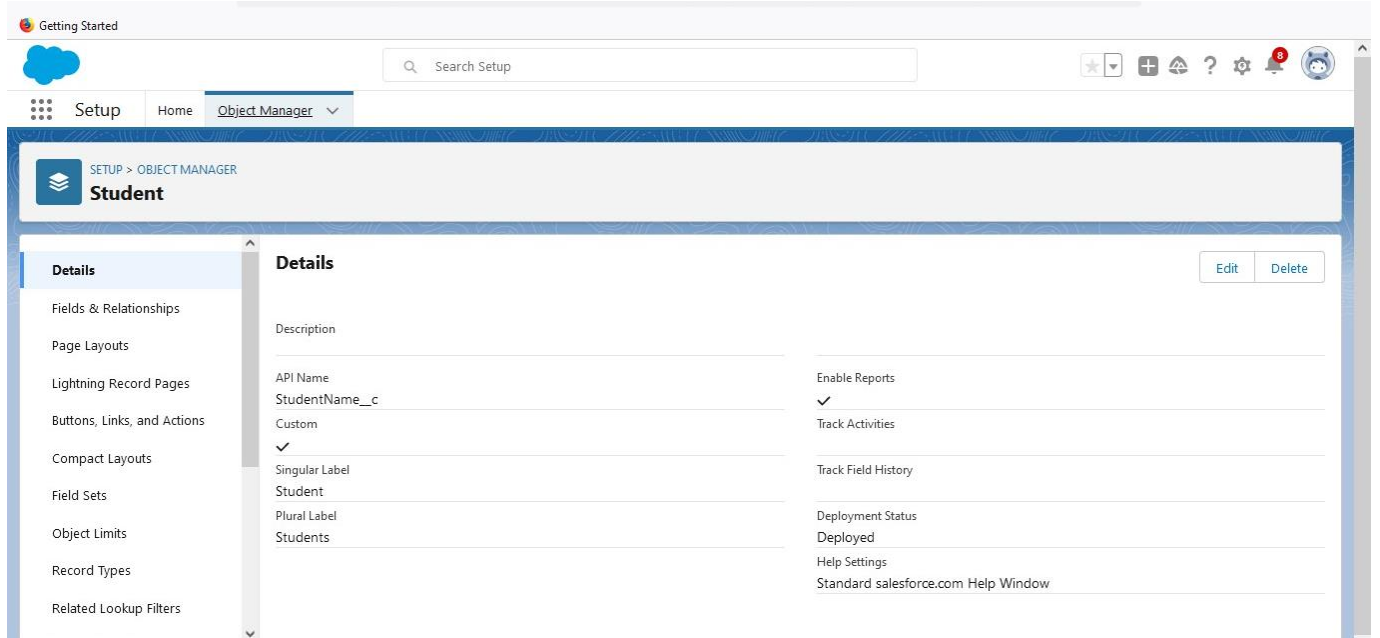
Attaching the screenshots of the project “A CRM Applications for Schools and Colleges” along with the description.

#### **MILESTONE-2:OBJECT**

**ACTIVITY-1: Creation of School object**

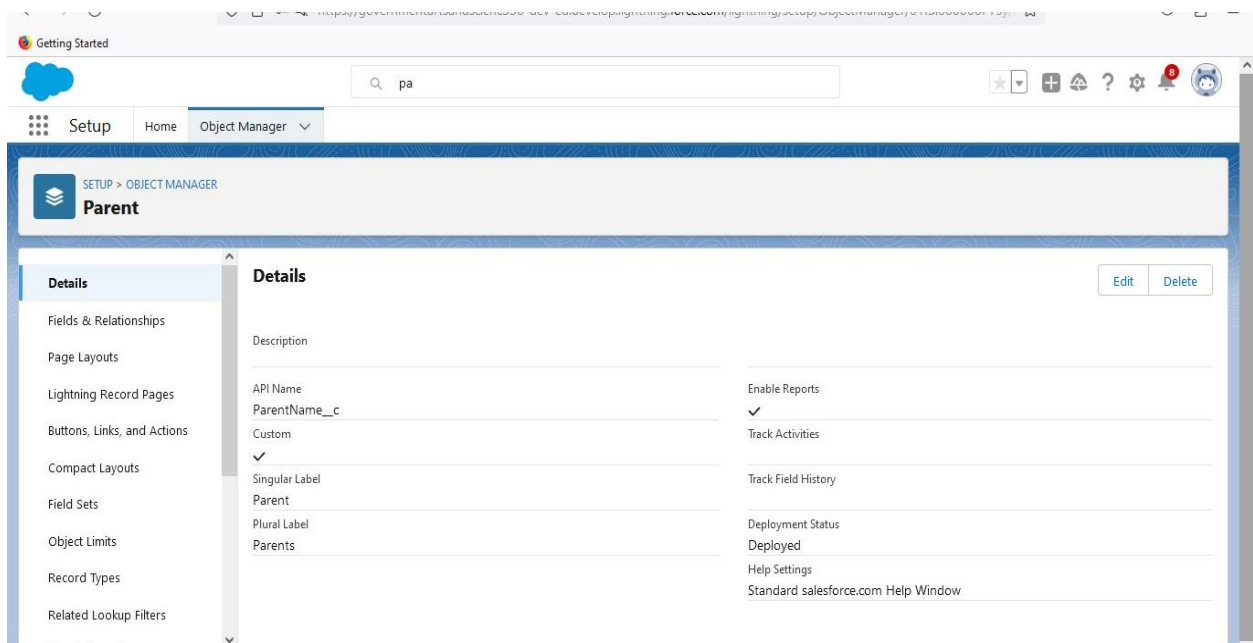
**ACTIVITY 2**

**Create Student Object:**



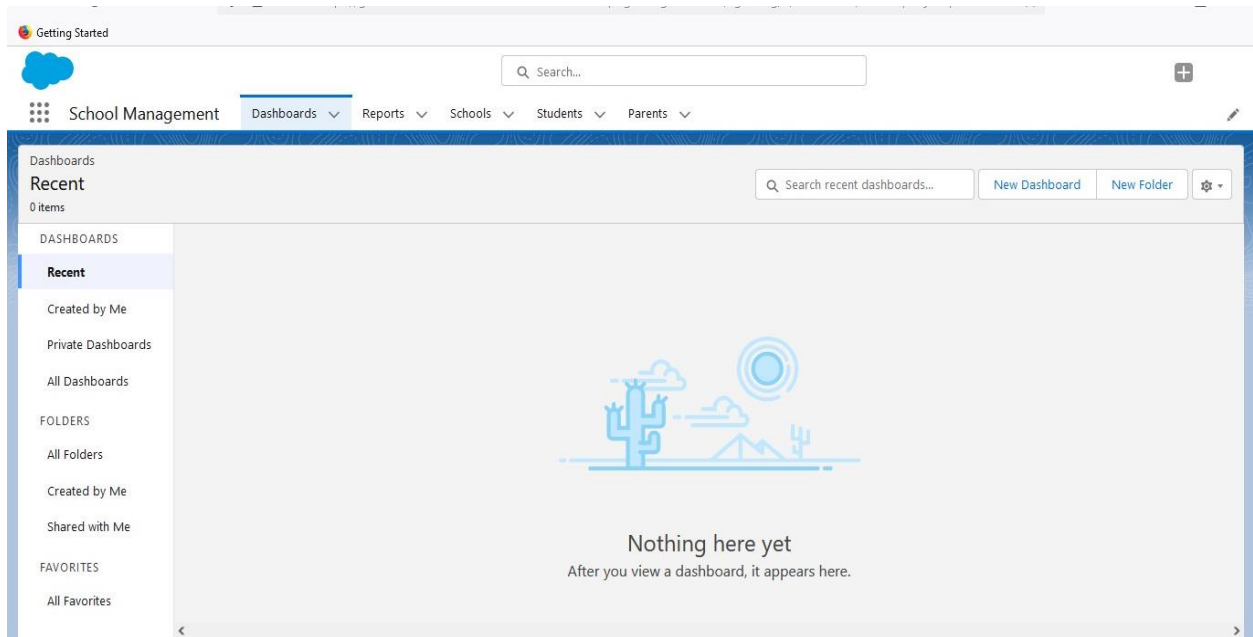
## ACTIVITY 3:

### Create Parent Object:



## MILESTONE -3 LIGHTNING APP

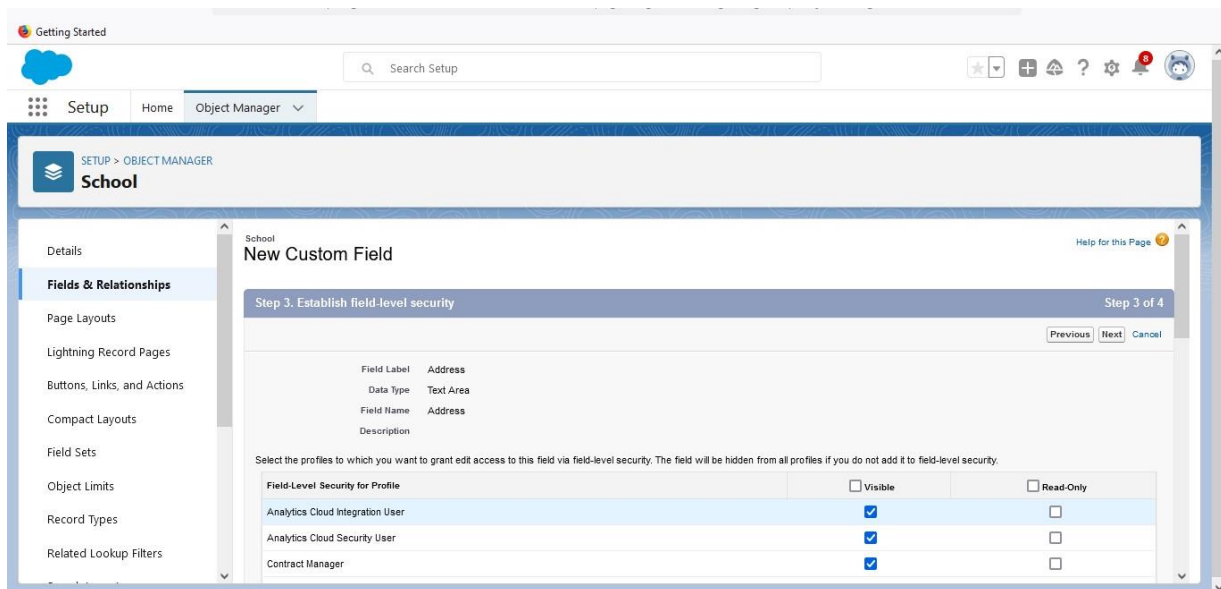
## ACTIVITY : Create the School Management App



## MILESTONE – 4 : FIELDS AND RELATIONSHIP:

### ACTIVITY-1

### Creation of fields for the School objects:





Getting Started

Search Setup

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

Record Types

Related Lookup Filters

Student

New Custom Field

Help for this Page

Step 3. Establish field-level security

Step 3 of 4

PreviousNextCancel

Field Label

District

Data Type

Text Area

Field Name

District

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Getting Started

Search Setup

Setup

Home

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SETUP > OBJECT MANAGER

Student

Details

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Field Sets

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Record Types

Related Lookup Filters

Student

New Custom Field

Help for this Page

Step 3. Establish field-level security

Step 3 of 4

PreviousNextCancel

Field Label

State

Data Type

Text Area

Field Name

State

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Getting Started

Setup Home Object Manager

Search Setup

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

School

### New Custom Field

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label	PhoneNumber
Data Type	Phone
Field Name	PhoneNumber
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.

## ACTIVITY- 2:

Getting Started

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

student Custom Field

### Results

Back to student

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	student
Field Name	Results	Data Type	Picklist
API Name	Results__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shamini.k	Modified By	shamini.k
	18/04/2023, 9:27 pm		18/04/2023, 9:27 pm

General Options

Required

Getting Started

Setup Home Object Manager

student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

student Custom Field

Class

Back to student

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	Class	Object Name	student
Field Name	Class	Data Type	Number
API Name	Class__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shamini.k	Modified By	shamini.k
	18/04/2023, 9:32 pm		18/04/2023, 9:32 pm

General Options

Required

Getting Started

Setup Home Object Manager

student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

student Custom Field

Marks

Back to student

Validation Rules (0)

Custom Field Definition Detail

Field Information

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			
Created By	shamini.k	Modified By	shamini.k
	18/04/2023, 9:36 pm		18/04/2023, 9:36 pm

General Options

Required

## ACTIVITY-3

The screenshot shows the Salesforce Setup interface for the 'student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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 is titled 'student Custom Field parent address' with a 'Back to student' link. Below this is the 'Custom Field Definition Detail' section, which includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists the following details:

Field Label	parent address	Object Name	student
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	shamini.k	Modified By	shamini.k
	19/04/2023, 8:16 am		19/04/2023, 8:16 am

Below the table is the 'General Options' section, which includes a 'Required' checkbox.

The screenshot shows the Salesforce Setup interface for the 'student' object, displaying the configuration for the 'Parent Number' custom field. The left sidebar is identical to the previous screenshot. The main content area is titled 'student Custom Field Parent Number' with a 'Back to student' link. Below this is the 'Custom Field Definition Detail' section, which includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists the following details:

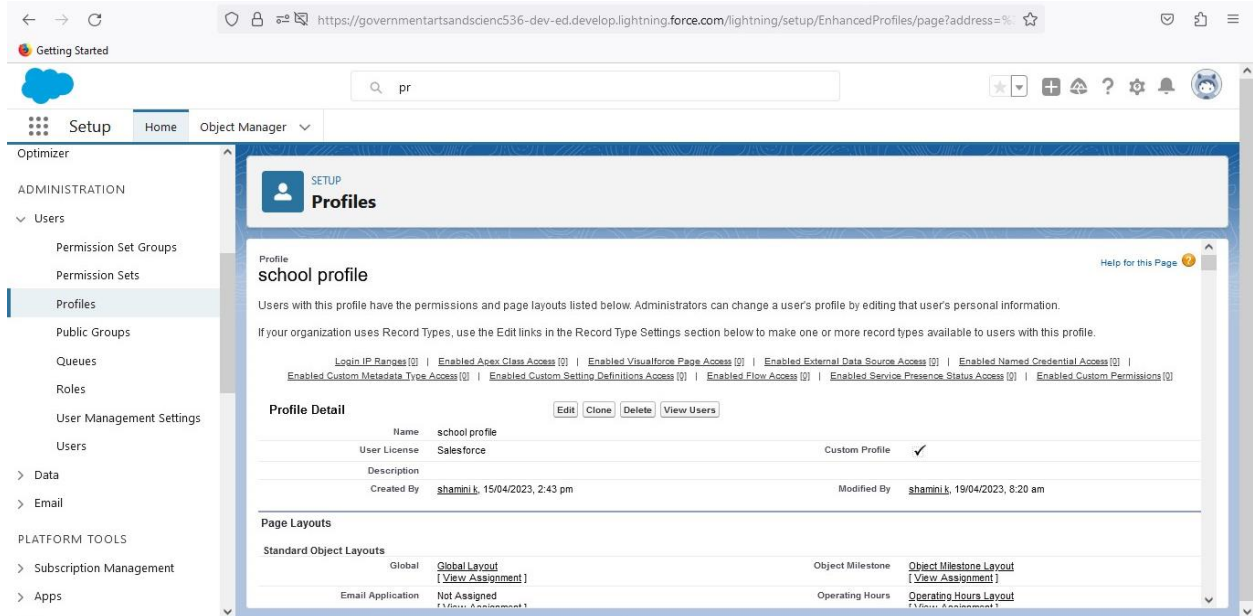
Field Label	Parent Number	Object Name	student
Field Name	Parent_Number	Data Type	Phone
API Name	Parent_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	shamini.k	Modified By	shamini.k
	19/04/2023, 8:20 am		19/04/2023, 8:20 am

Below the table is the 'General Options' section, which includes a 'Required' checkbox.

# MILESTONE – 5

## ACTIVITY

### Creation on profile

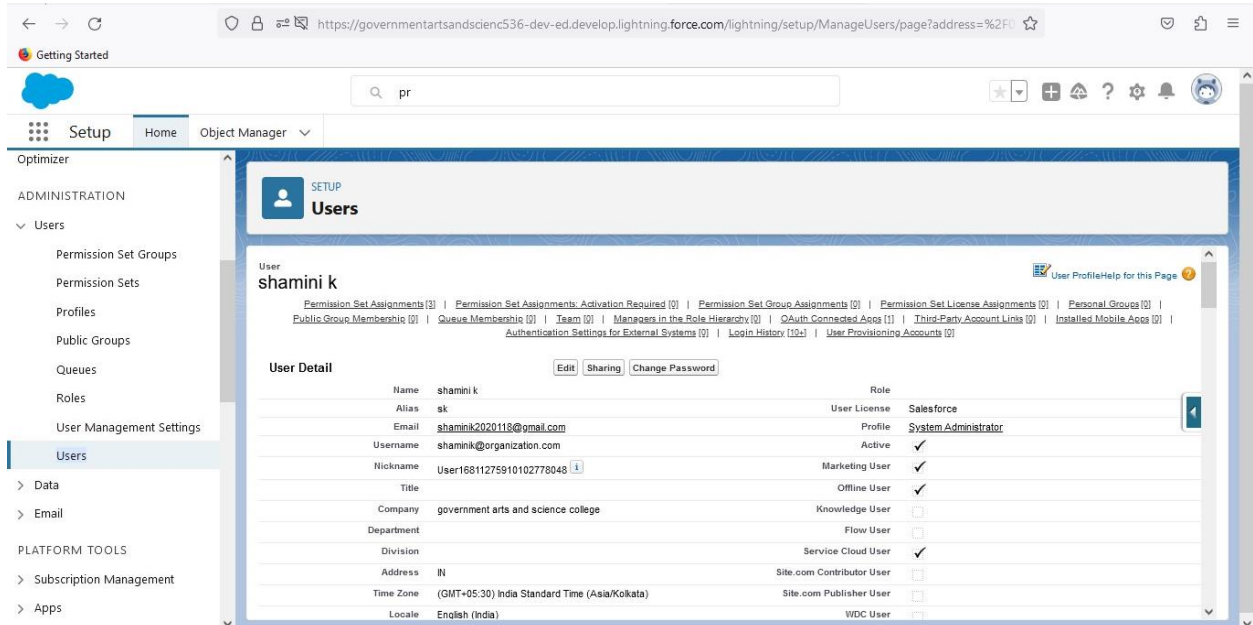


The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. Under Setup, there are links for Optimizer, ADMINISTRATION (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, and PLATFORM TOOLS (Subscription Management, Apps). The main content area is titled 'Profiles' and shows a list of profiles. The 'school profile' is selected, and its details are displayed. The 'Profile Detail' section shows the name 'school profile', user license 'Salesforce', and a custom profile checkbox checked. The 'Page Layouts' section shows the standard object layouts for Global, Object Milestone, and Operating Hours.

Profile Detail	
Name	school profile
User License	Salesforce
Description	
Created By	shamini k, 15/04/2023, 2:43 pm
Modified By	shamini k, 19/04/2023, 8:20 am

Page Layouts	
Global	Global Layout [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]

# MILESTONE–6USERS:ACTIVITY



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. Under Setup, there are links for Optimizer, ADMINISTRATION (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, and PLATFORM TOOLS (Subscription Management, Apps). The main content area is titled 'Users' and shows a list of users. The user 'shamini k' is selected, and their details are displayed. The 'User Detail' section shows the name 'shamini k', alias 'sk', email 'shamini2020118@gmail.com', username 'shamini2020118@organization.com', nickname 'User16811275910102778048', title, company 'government arts and science college', department, division, address 'IN', time zone '(GMT+05:30) India Standard Time (Asia/Kolkata)', and locale 'English (India)'. The 'Role' section shows the user license 'Salesforce', profile 'System Administrator', active status checked, marketing user checked, offline user checked, knowledge user unchecked, flow user unchecked, service cloud user checked, site.com contributor user unchecked, site.com publisher user unchecked, and WDC user unchecked.

User Detail	
Name	shamini k
Alias	sk
Email	shamini2020118@gmail.com
Username	shamini2020118@organization.com
Nickname	User16811275910102778048
Title	
Company	government arts and science college
Department	
Division	
Address	IN
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)

Role	
User License	Salesforce
Profile	System Administrator
Active	✓
Marketing User	✓
Offline User	✓
Knowledge User	✗
Flow User	✗
Service Cloud User	✓
Site.com Contributor User	✗
Site.com Publisher User	✗
WDC User	✗

## MILESTONE -7 PERMISSION SETS

### ACTIVITY-1 , Permission sets : 1

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, Data.com, and Prospector Users. The main content area is titled 'Permission Sets' and shows the details for the 'teacher permission' set. The 'Permission Set Overview' section includes a table with the following data:

Field	Value
Description	teacher_permission
License	
Session Activation Required	<input type="checkbox"/>
API Name	teacher_permission
Namespace Prefix	
Created By	shamini.k
Last Modified By	shamini.k 15/04/2023, 3:23 pm

Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'. The 'Assigned Apps' section states: 'Settings that specify which apps are visible in the app menu'. The 'Assigned Connected Apps' section states: 'Settings that specify which connected apps are visible in the app menu'. The 'Object Settings' section states: 'Permissions to access objects and fields, and settings such as tab availability'.

### ACTIVITY -2, Permission Sets 2:

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, Data.com, and Prospector Users. The main content area is titled 'Permission Sets' and shows the details for the 'Principal permission' set. The 'Permission Set Overview' section includes a table with the following data:

Field	Value
Description	Principal_permission
License	
Session Activation Required	<input type="checkbox"/>
API Name	Principal_permission
Namespace Prefix	
Created By	shamini.k
Last Modified By	shamini.k 15/04/2023, 3:38 pm

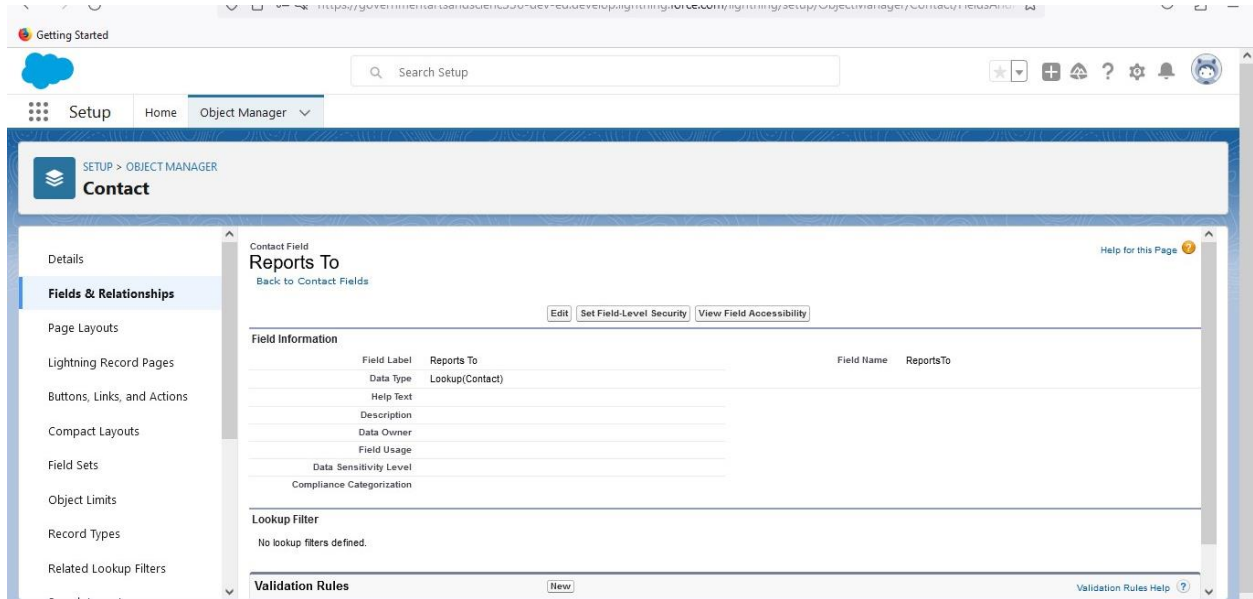
Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'. The 'Assigned Apps' section states: 'Settings that specify which apps are visible in the app menu'. The 'Assigned Connected Apps' section states: 'Settings that specify which connected apps are visible in the app menu'. The 'Object Settings' section states: 'Permissions to access objects and fields, and settings such as tab availability'.

## MILESTONE-8: REPORTS



# ACTIVITY

## Reports:



## 4. TRAILHEAD PROFILE PUBLIC URL

- Team leader : <https://trailblazer.me/id/shamk24>
- Team member1 : <https://trailblazer.me/id/sugim30>
- Team member2 : <https://trailblazer.me/id/sujip8>
- Team member3: <https://trailblazer.me/id/valars10>
- Team member4: <https://trailblazer.me/id/vijip8>

## **5. ADVANTAGES & DISADVANTAGES:**

**List of advantages and disadvantages of the proposed solution.**

<b>ADVANTAGES</b>	<b>DISADVANTAGES</b>
<b>Helps the students to improve their knowledge.</b>	<b>Most of the students doesn't have laptop to do their project.</b>
<b>Lead a way create job opportunity.</b>	<b>Internet problem</b>
<b>Makes us to understand the Customer Relationship Management.</b>	<b>Don't have enough time to complete the project.</b>
<b>Got an idea about project Development Process.</b>	<b>Fear to chat with Sales force Administrator.</b>
<b>Creating Empathy Map.</b>	<b>Log in &amp; Sign Up problems.</b>

## **6. Applications:**

**The area where is this solution can be applied.**

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



## **7.CONCLUSION:**

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

## **7.FUTURE SCOPE:**

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

The worlds’ 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 sales force and customer relationship management, because while sale a product we should fulfill the customer needs and the customer wants to satisfies, 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.

