# 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 t5o 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 works 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 to 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:**

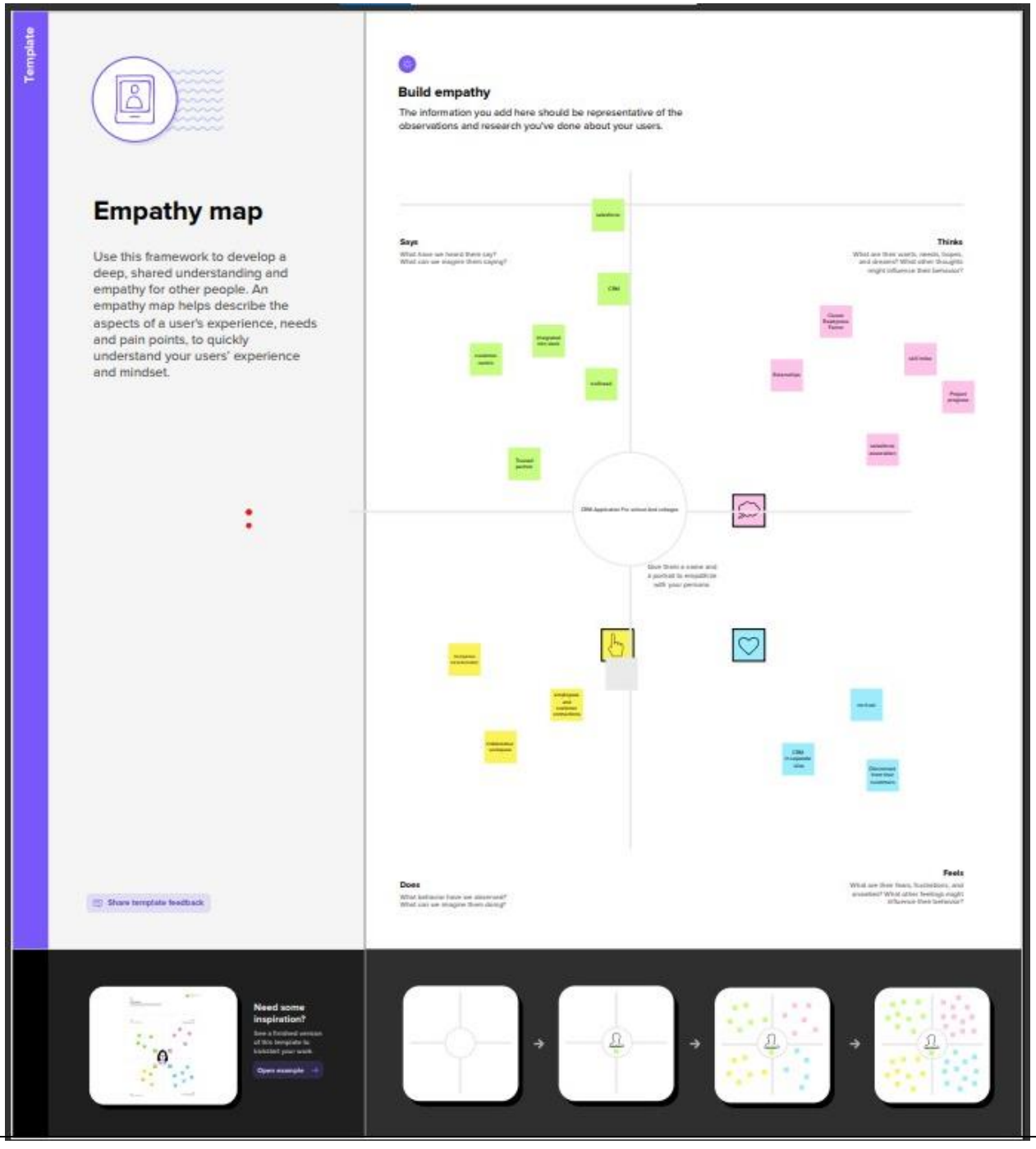
**Design thinking involves five steps:**

- **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 helps 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.**



## 2.2 IDEATION& BAINSTORMING MAP:

**Pasting the ideation & brainstorming Map screenshot**

## 3. RESULT:

## 3.1 DATA MODEL:

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

## 3.2 ACTIVITY & SCREENSHOTS:

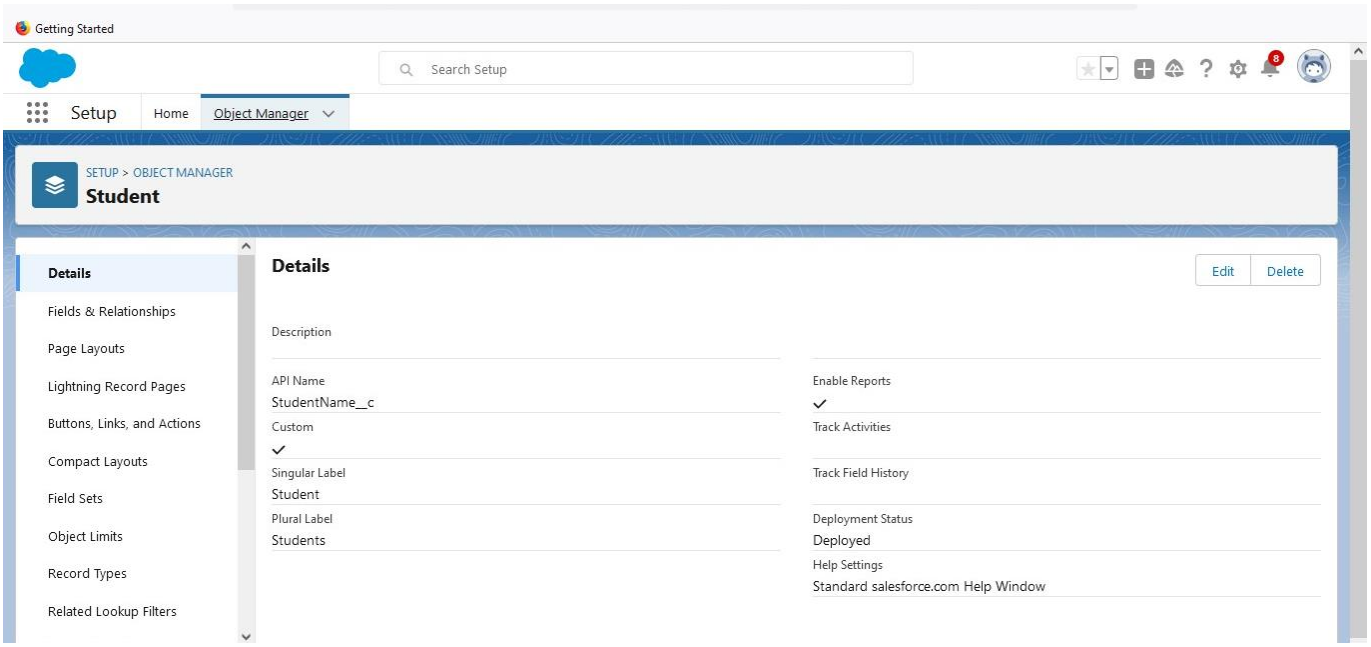
Attaching the screenshots of the project "A CRM Applications for Schools and Colleges" along with the description.

## MILESTONE-2:OBJECT

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

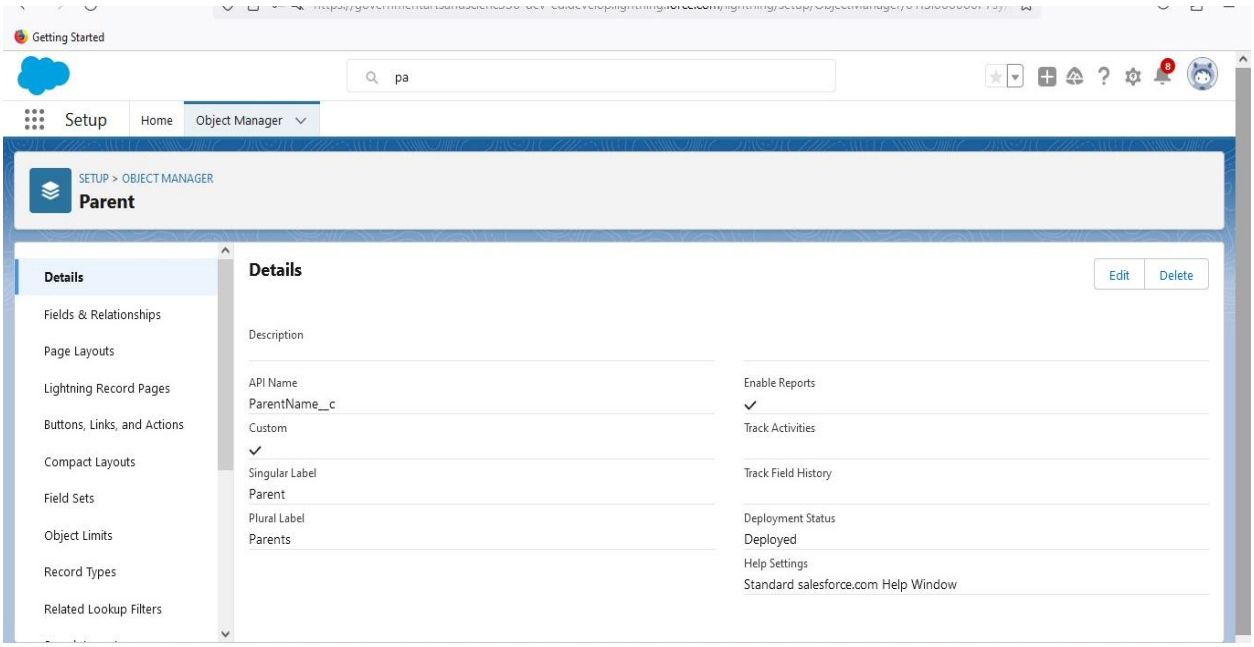
## ACTIVITY 2

**Create Student Object:**



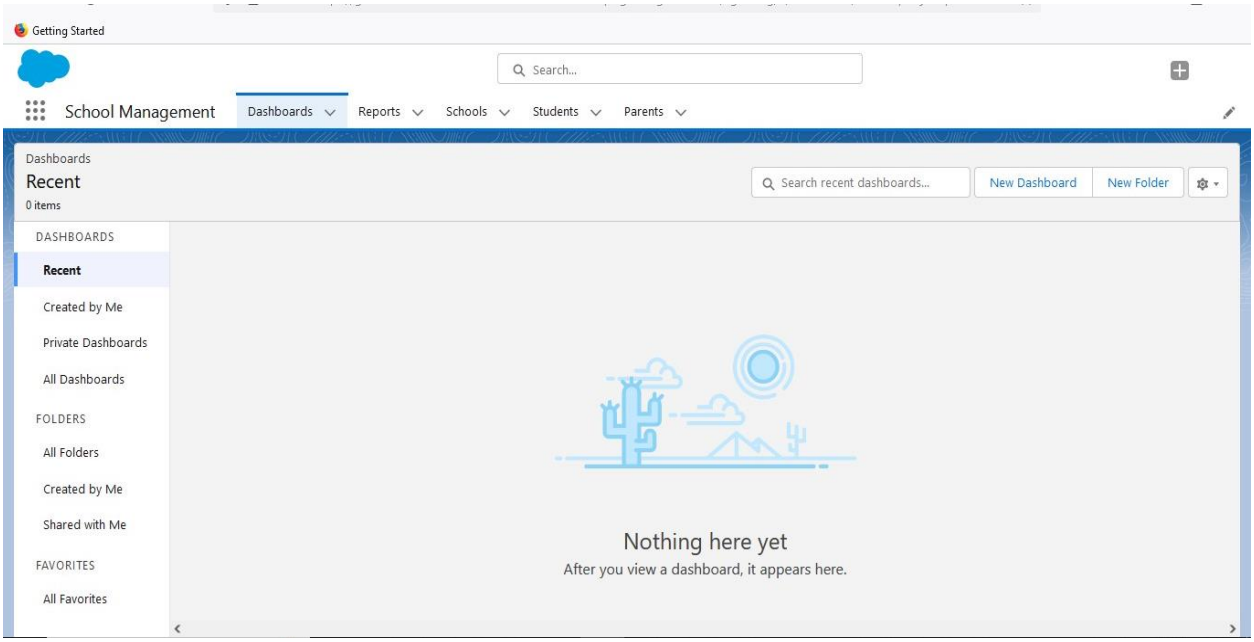

# ACTIVITY 3:

## Create Parent Object:




# MILESTONE -3 LIGHTNING APP

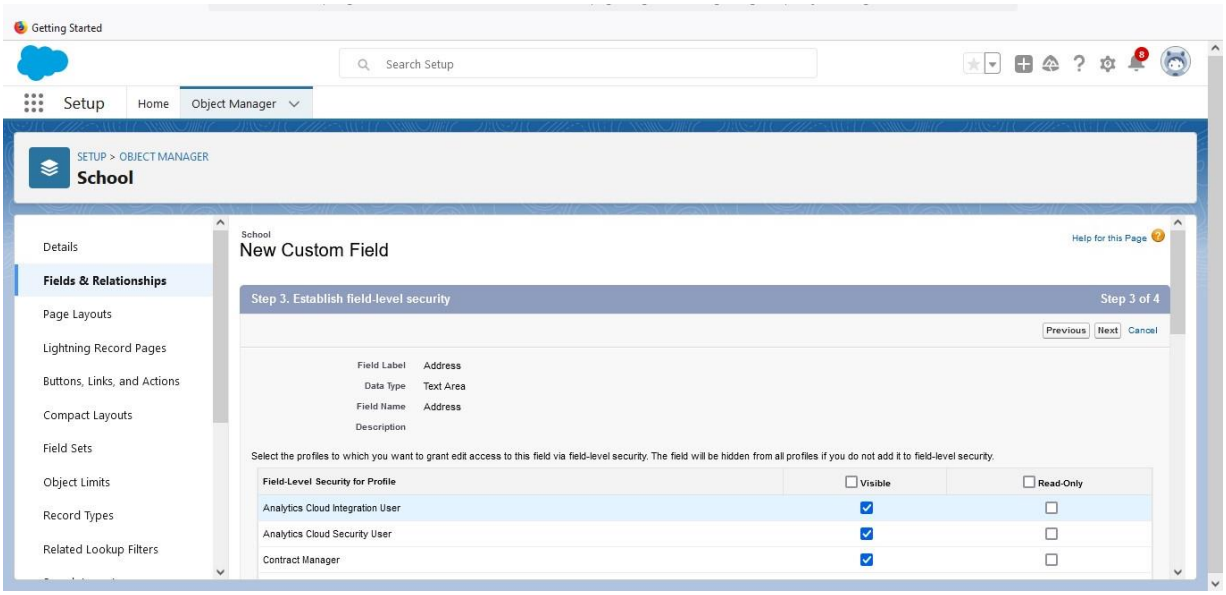
# ACTIVITY : Create the School Management App

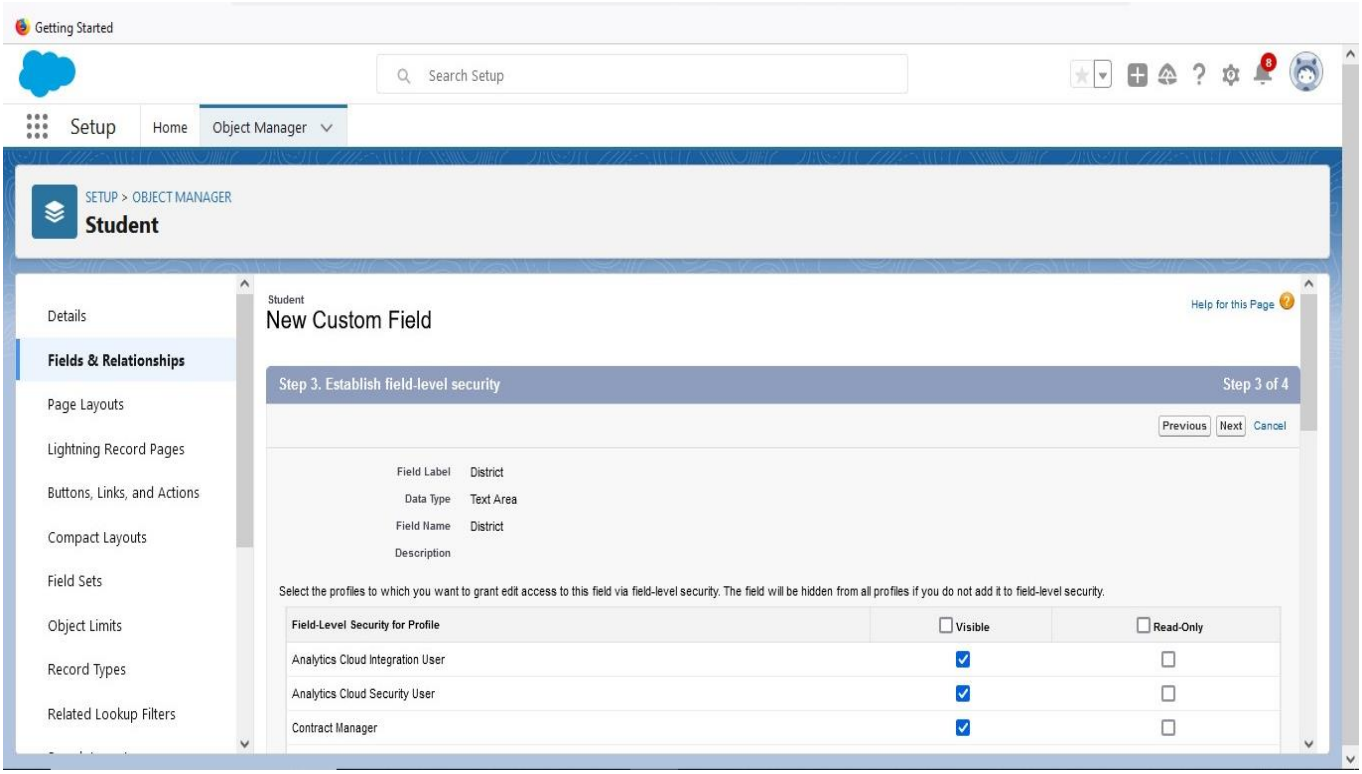


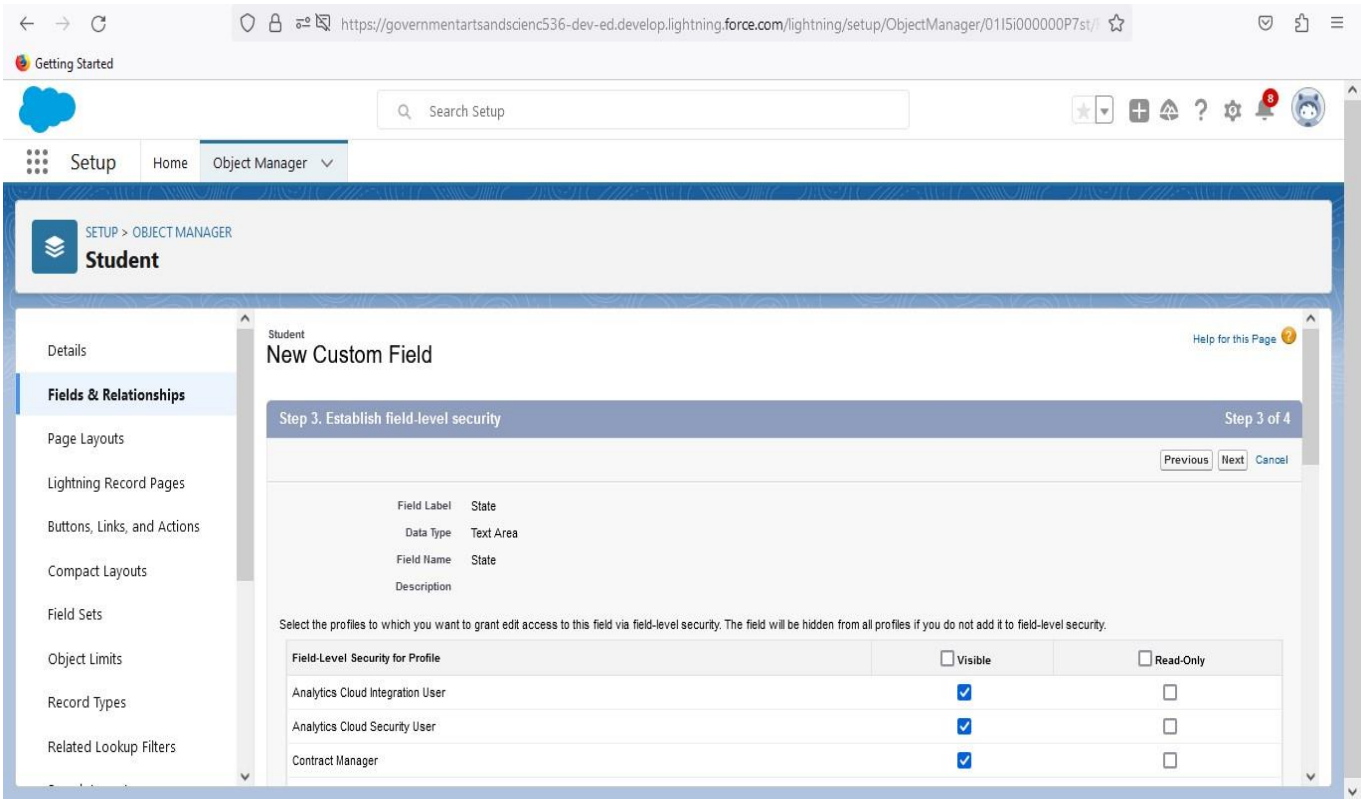

## MILESTONE – 4 : FIELDS AND RELATIONSHIP:

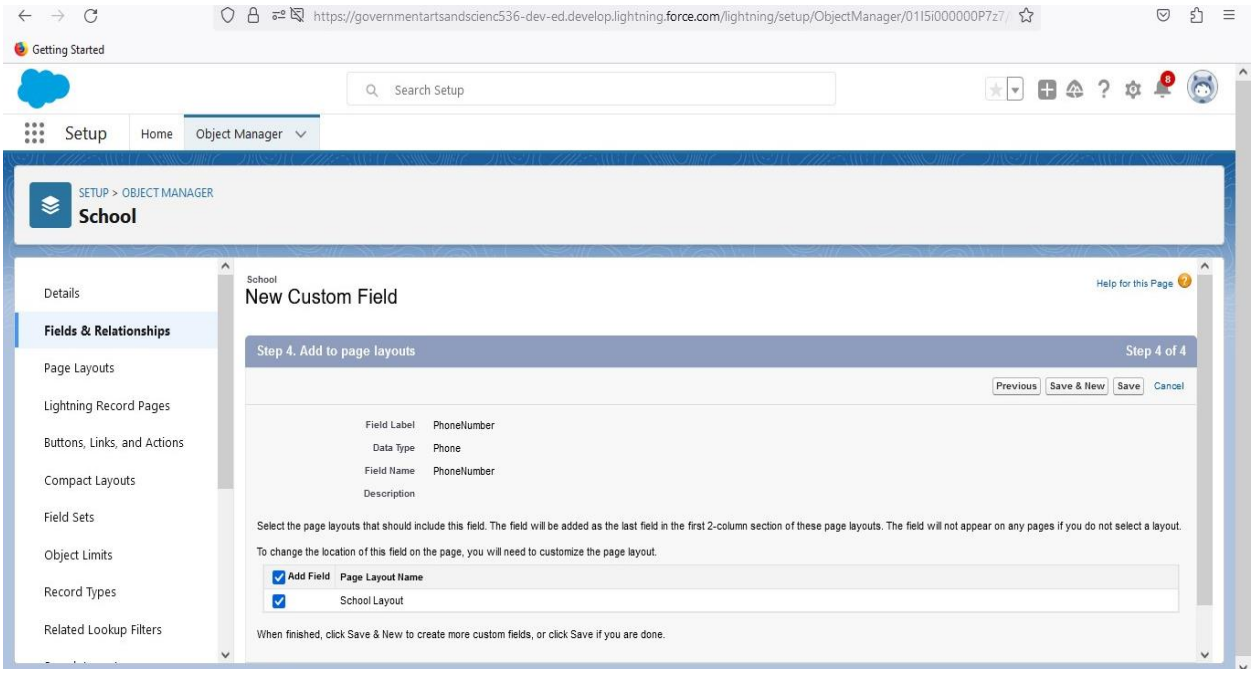
## ACTIVITY-1

## Creation of fields for the School objects:

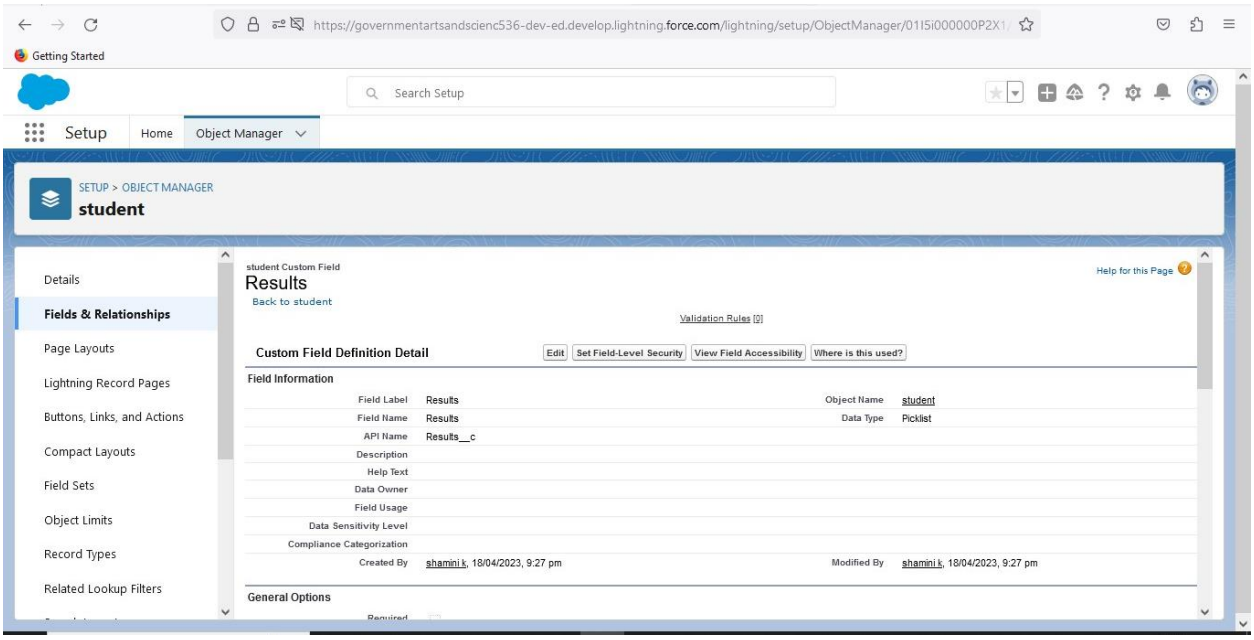


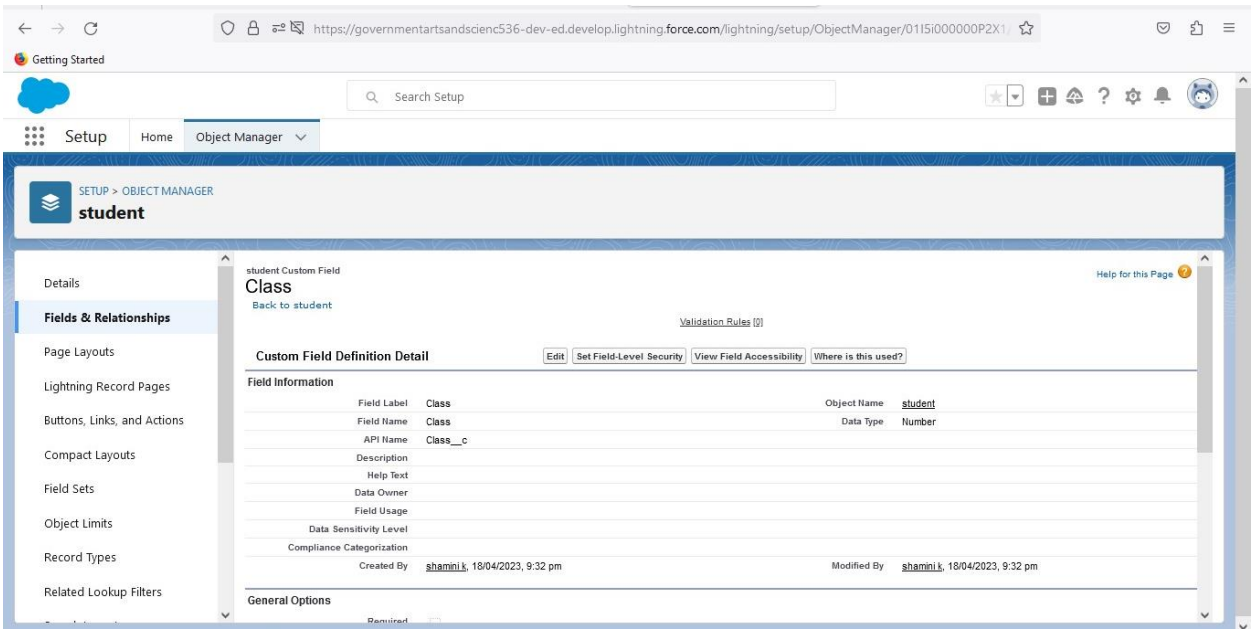

Getting Started
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Student
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
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
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager

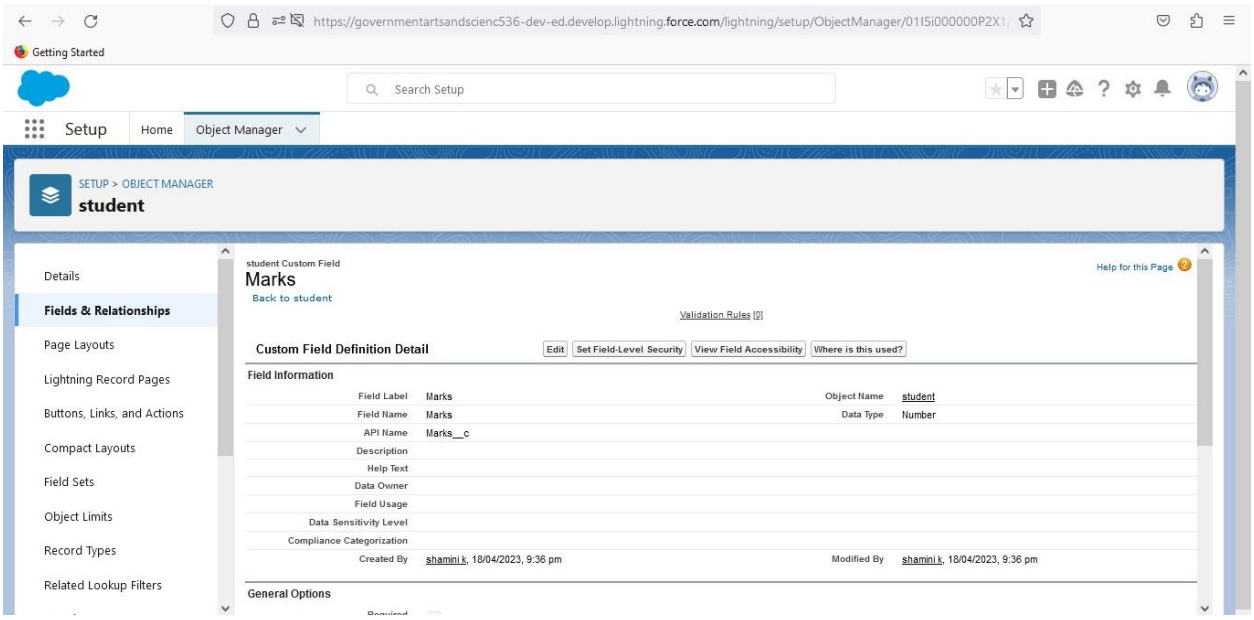

https://governmentartsandscienc536-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5i000000P7st/
Getting Started
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact 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
Previous
Next
Cancel
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
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager


Search Setup
Setup
Home
Object Manager
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
Help for this Page
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.

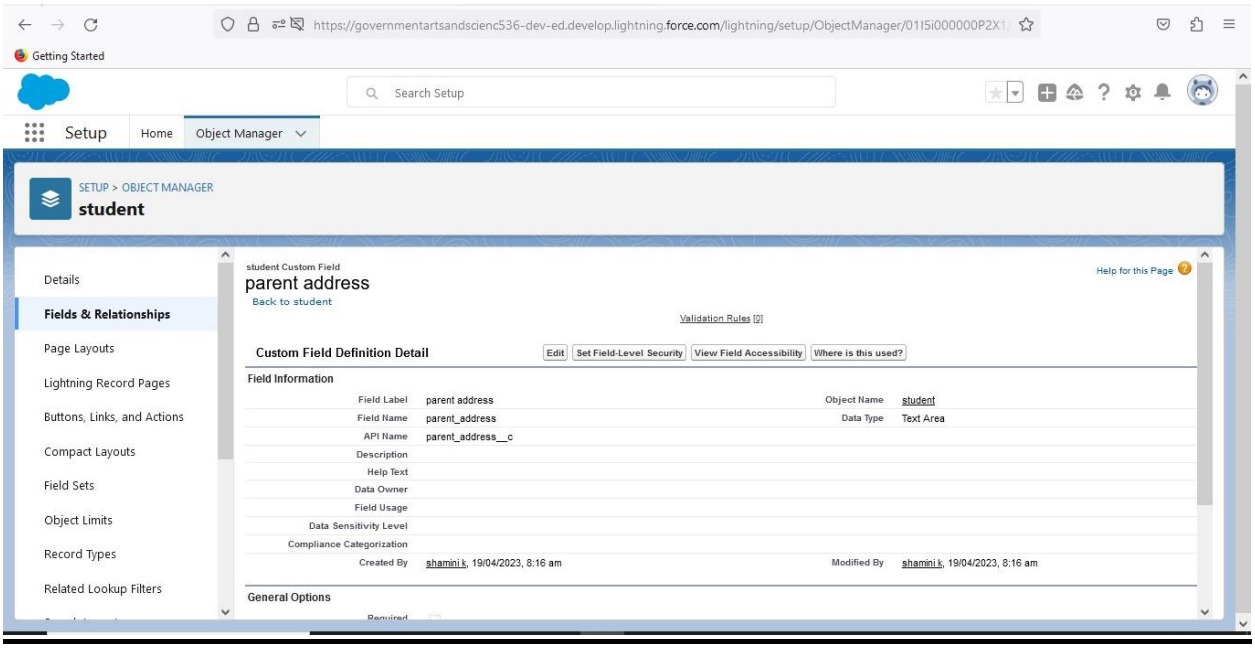
# ACTIVITY- 2:

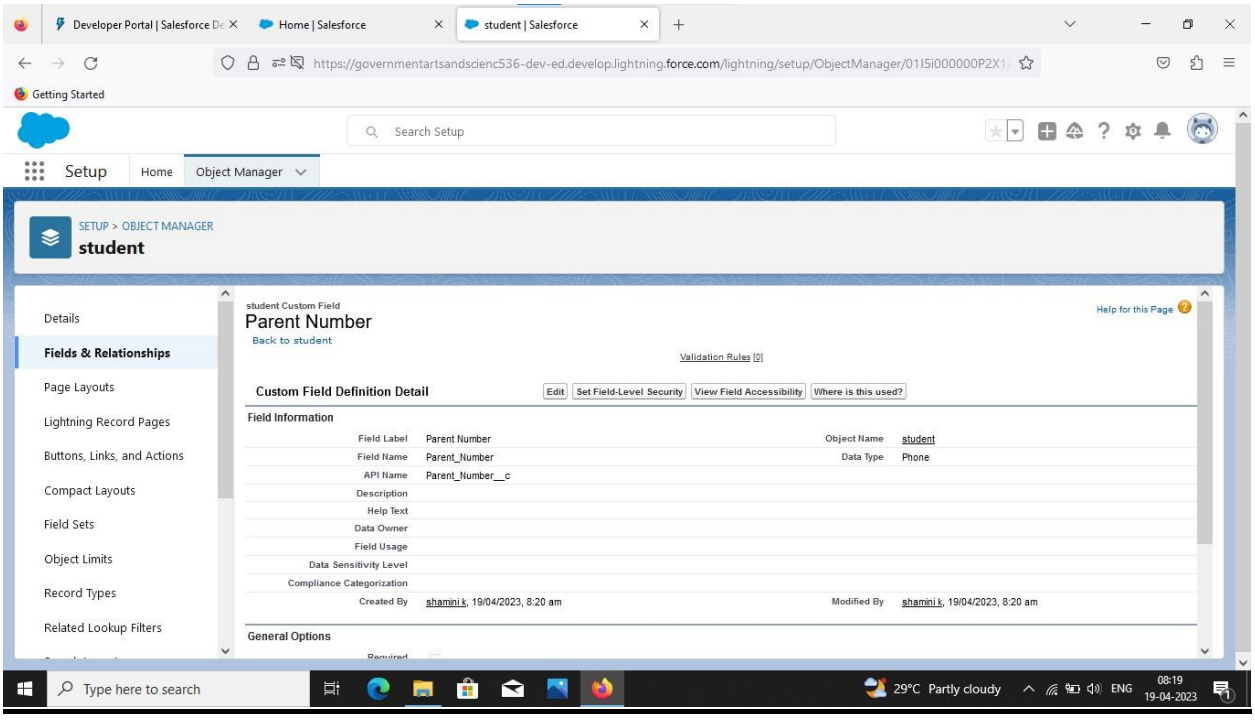

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
student Custom Field
Results
Back to student
Help for this Page
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, 18/04/2023, 9:27 pm
Modified By shamini k, 18/04/2023, 9:27 pm
General Options


https://governmentartsandscienc536-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5i000000P2X1/
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 Custom Field
Class
Back to student
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
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, 18/04/2023, 9:32 pm
Modified By shamini k, 18/04/2023, 9:32 pm
General Options


https://governmentartsandscienc536-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5i000000P2X1/
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 Custom Field
Marks
Back to student
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
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, 18/04/2023, 9:36 pm
Modified By shamini k, 18/04/2023, 9:36 pm
General Options

# ACTIVITY-3

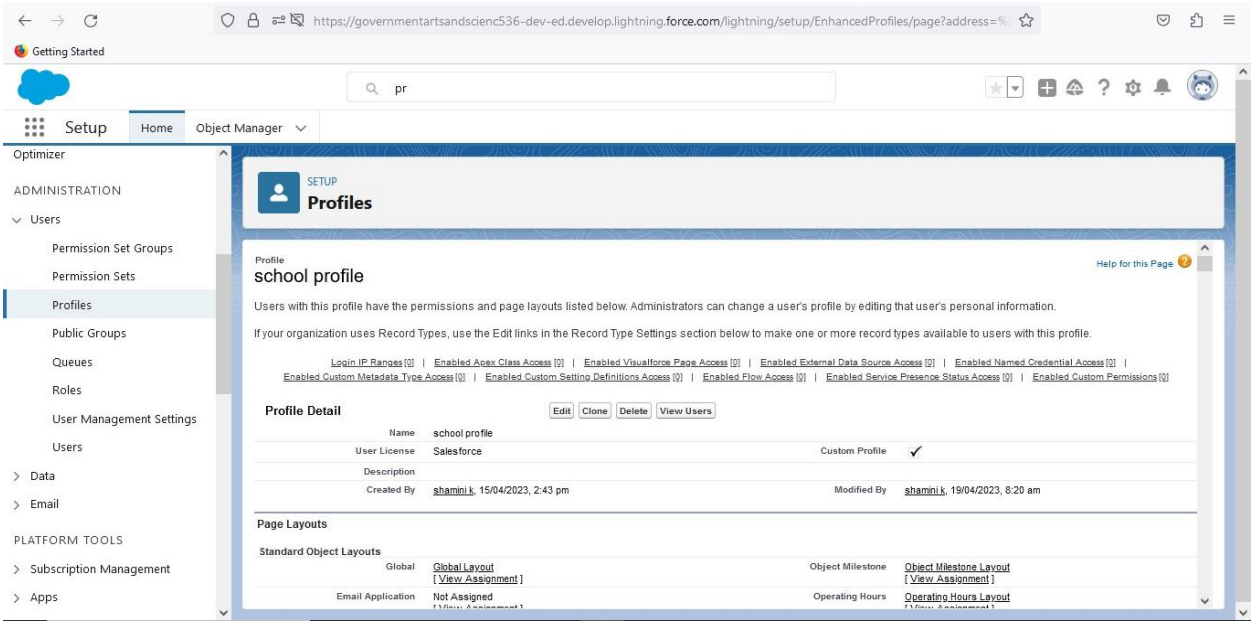

Getting Started
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
student Custom Field
parent address
Back to student
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label parent address
Field Name parent_address
API Name parent_address__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By shamini k, 19/04/2023, 8:16 am
Object Name student
Data Type Text Area
Modified By shamini k, 19/04/2023, 8:16 am
General Options


Developer Portal | Salesforce
Home | Salesforce
student | Salesforce
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 Custom Field
Parent Number
Back to student
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Parent Number
Field Name Parent_Number
API Name Parent_Number__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By shamini k, 19/04/2023, 8:20 am
Object Name student
Data Type Phone
Modified By shamini k, 19/04/2023, 8:20 am
General Options
Type here to search
29°C Partly cloudy
ENG
08:19
19-04-2023

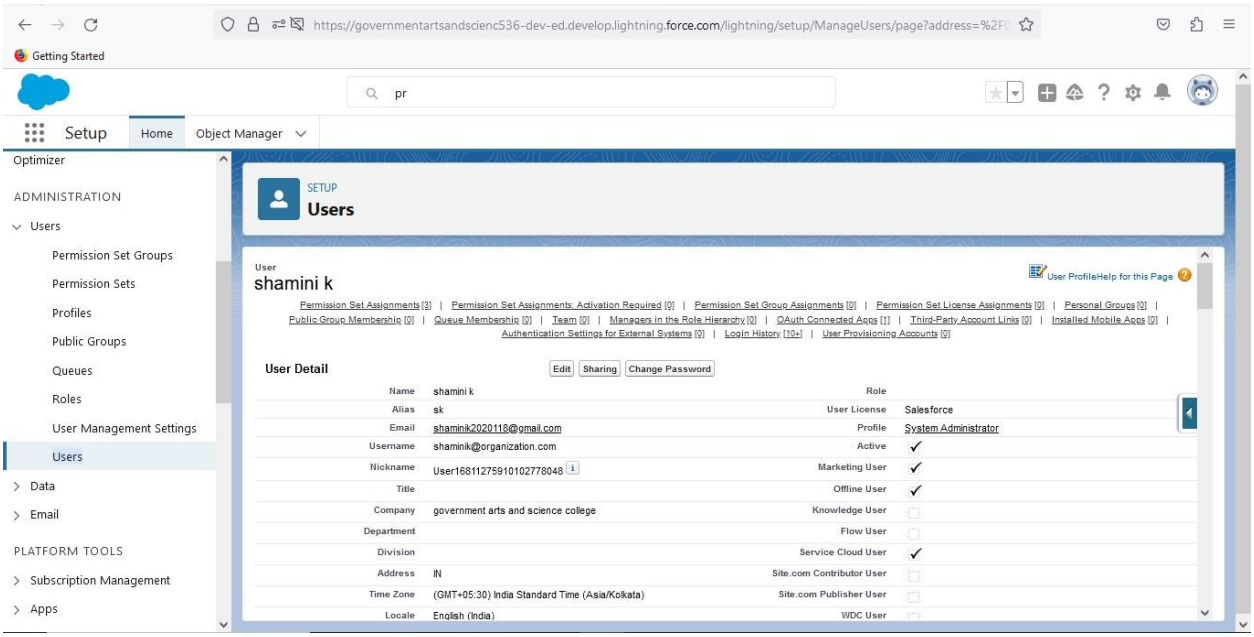
# MILESTONE – 5

## ACTIVITY

## Creation on profile

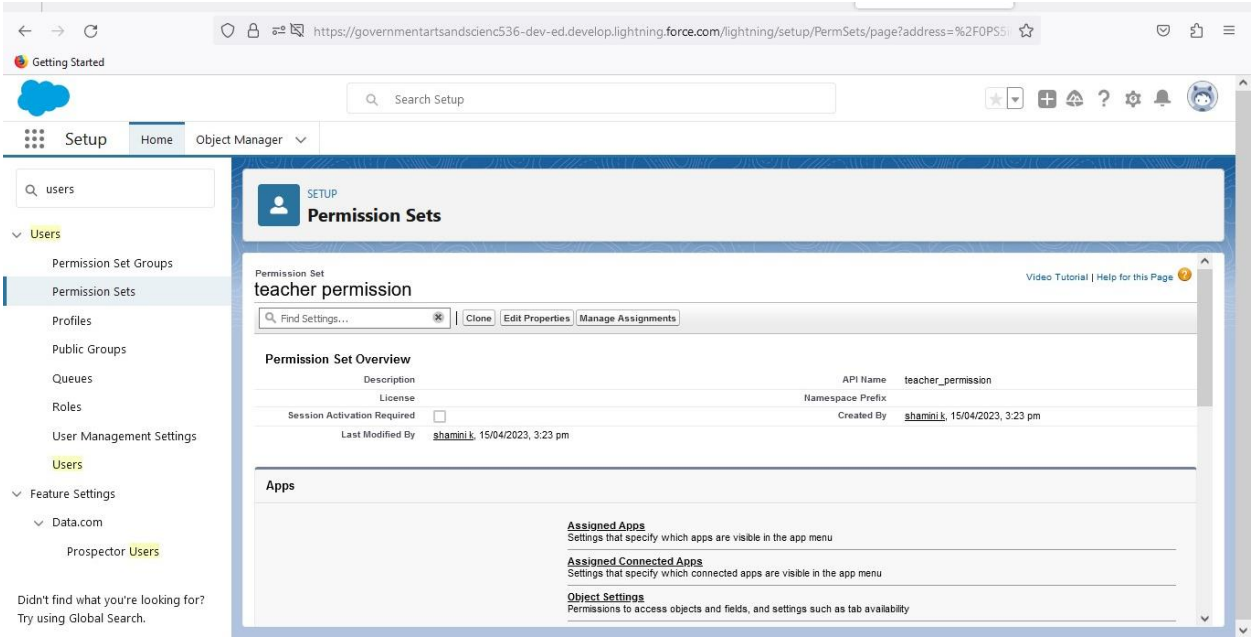



# MILESTONE–6USERS:ACTIVITY

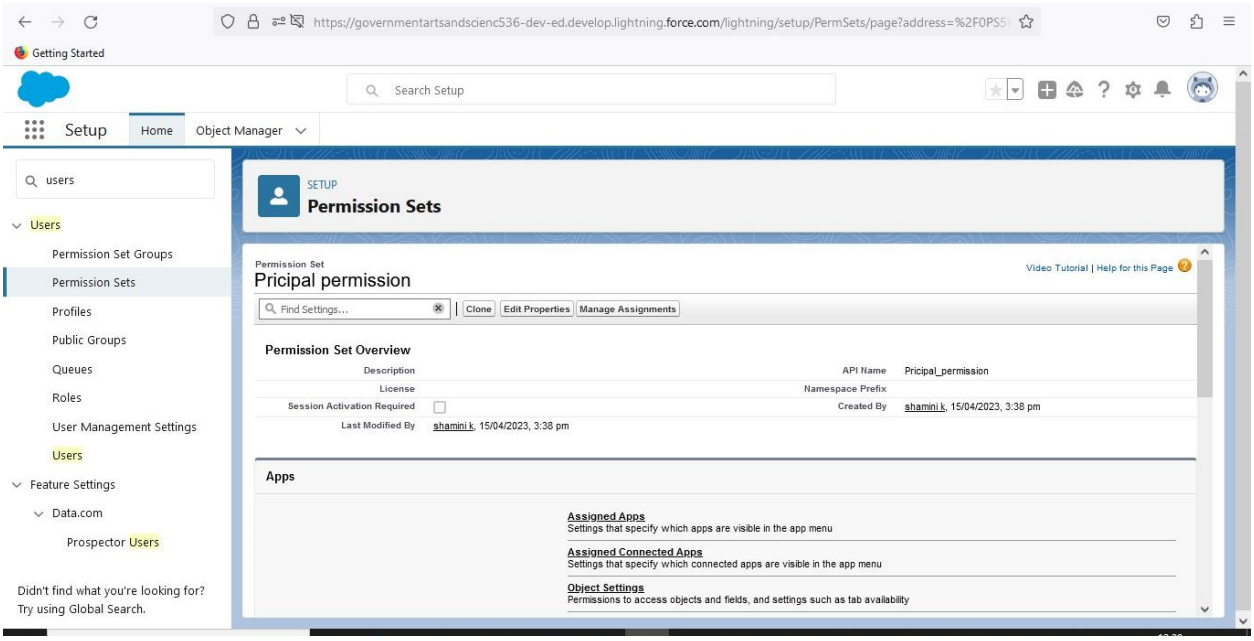


# MILESTONE -7 PERMISSION SETS

## ACTIVITY-1 , Permission sets : 1



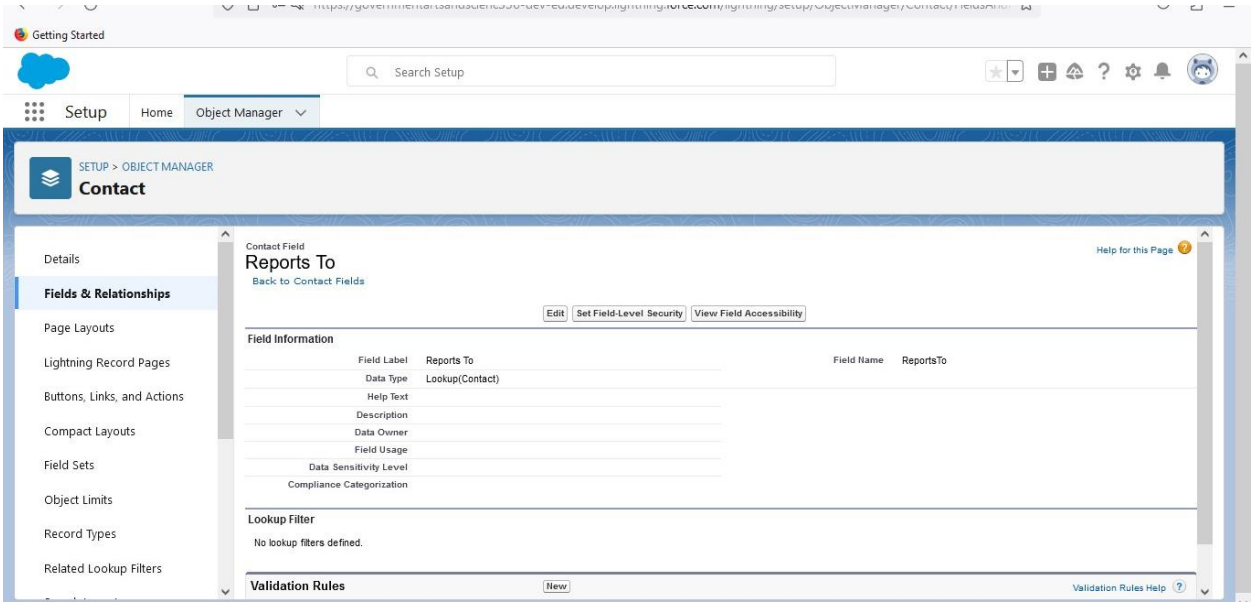

## ACTIVITY -2, Permission Sets 2:




# 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.**

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

## 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.**