

Date	26th April 2023
Team ID	NM2023TMID36142
Project Name	A CRM APPLICATION FOR SCHOOLS/COLLEGES
Team Leader	DEVAYANI. B
Team Member	SANTHIYA. B SOWMIYA. M

1 INTRODUCTION

Overview

Project Description

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

1.1 Purpose

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something.

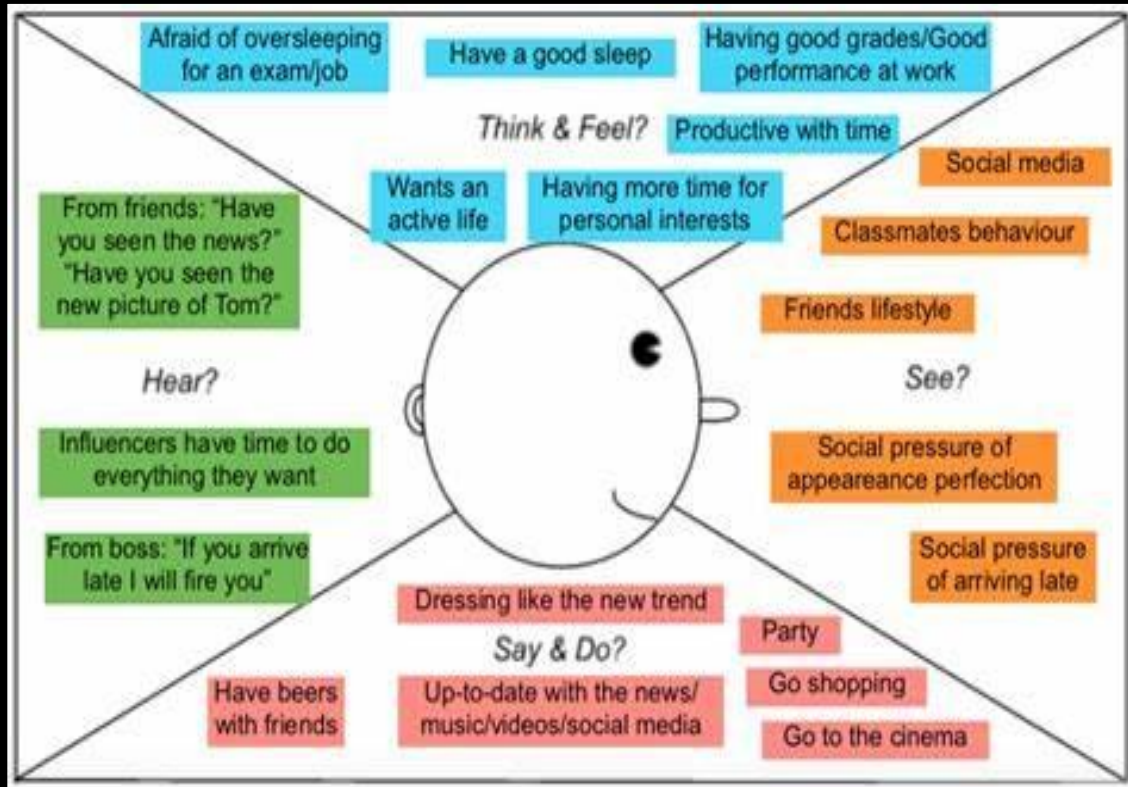
2 PROBLEM DEFINITION & DESIGN THINKING

Empathy Map

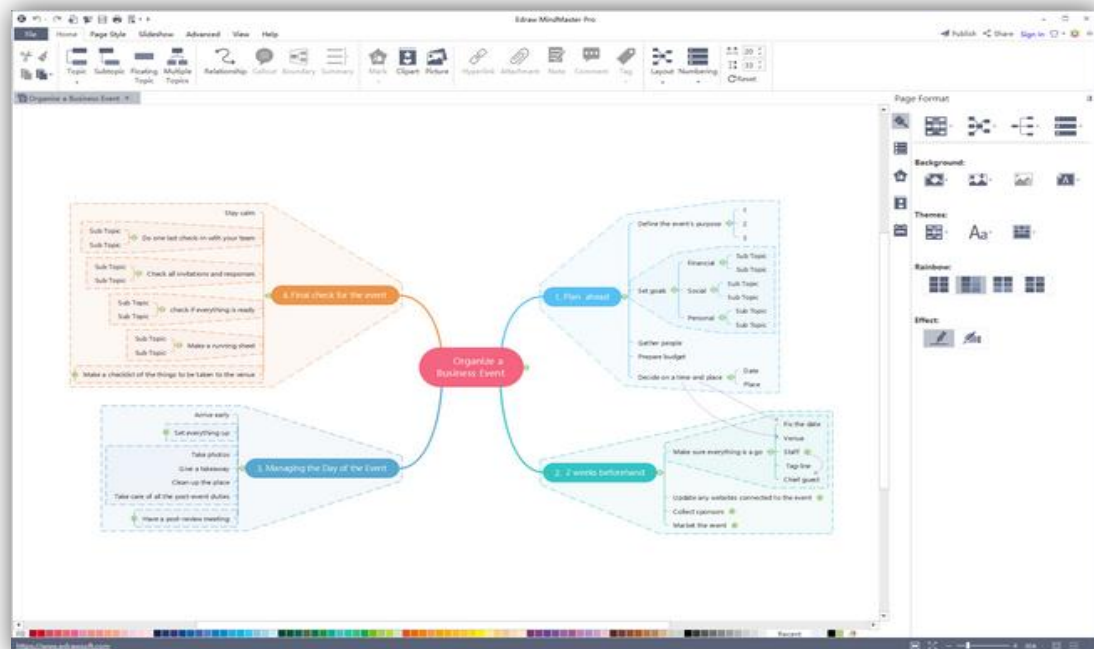
An empathy map is a tool that helps you discover how your target audience thinks, feels, and behaves so you can better understand their wants and needs.

* Before you can use this tool, you must first build a user persona or scenario to represent one of your target audiences. There are two main "methods" to persona creation. One is a persona description. For example, you might have the "confident shopper" or the "curious buyer." This type of persona explains, in broad strokes, what motivates someone. It can help product, marketing, and sales teams understand their overall audience.

* The second type of persona is a specific person, and this is the type you'll use for your empathy map. This persona is a made up person that has a name, an age, likes, and dislikes. Putting a specific name, face, and age to a persona makes it easier to empathize with them.



2.1 Ideation & Brainstorming Map

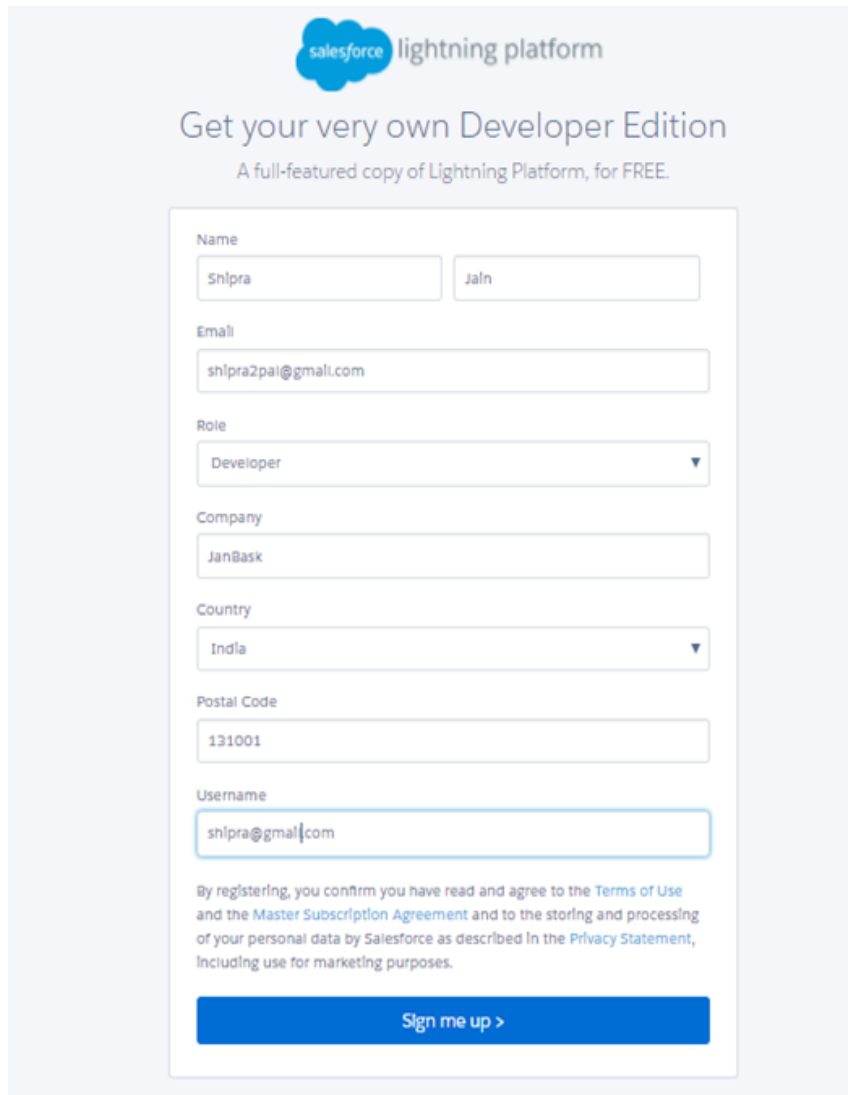


3 RESULT

3.1 Data Model

3.2 Activity&Screenshot

Milestone 1:



The screenshot shows the Salesforce Lightning Platform Developer Edition registration page. At the top, the Salesforce logo and 'lightning platform' text are displayed. Below this, the heading 'Get your very own Developer Edition' is followed by the subtext 'A full-featured copy of Lightning Platform, for FREE.' The registration form contains the following fields: 'Name' (split into first and last name, with 'Shilpa' and 'Jain' entered), 'Email' (shilpa2pai@gmail.com), 'Role' (Developer), 'Company' (JanBask), 'Country' (India), 'Postal Code' (131001), and 'Username' (shilpa@gmail.com). A disclaimer at the bottom states that by registering, the user agrees to the Terms of Use, Master Subscription Agreement, and Privacy Statement. A blue 'Sign me up >' button is at the bottom of the form.

salesforce lightning platform

Get your very own Developer Edition

A full-featured copy of Lightning Platform, for FREE.

Name
Shilpa Jain

Email
shilpa2pai@gmail.com

Role
Developer

Company
JanBask

Country
India

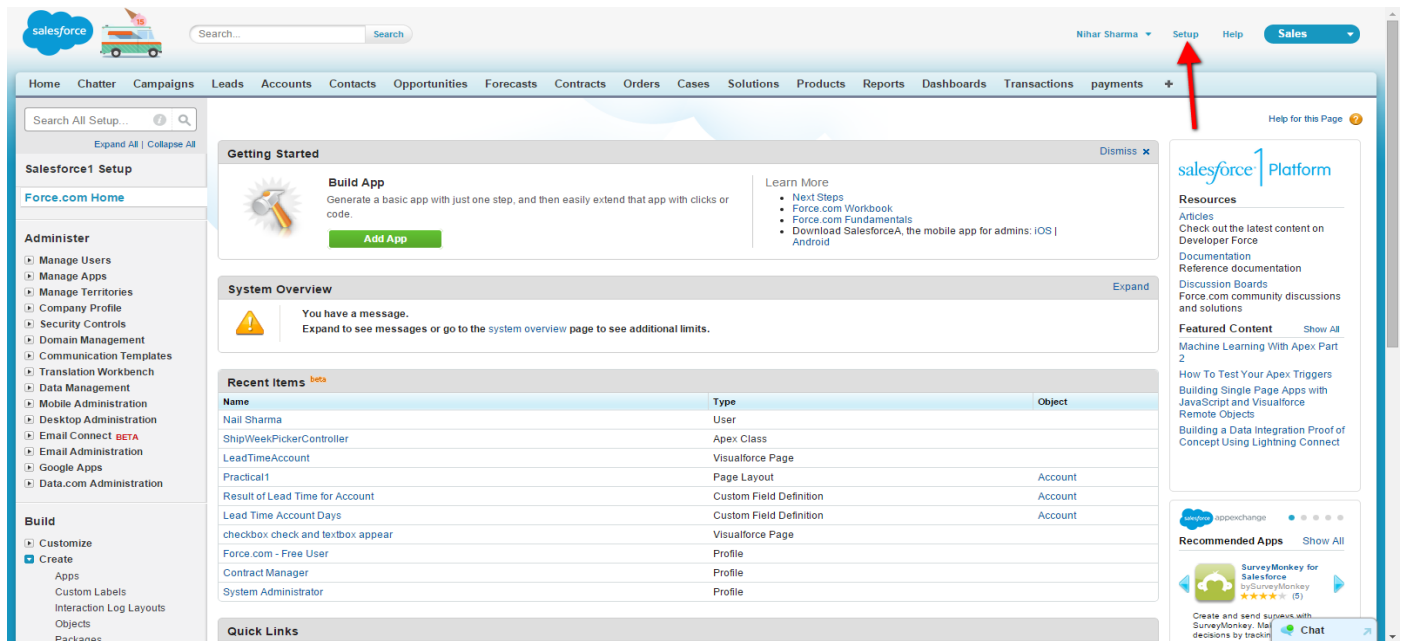
Postal Code
131001

Username
shilpa@gmail.com

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes.

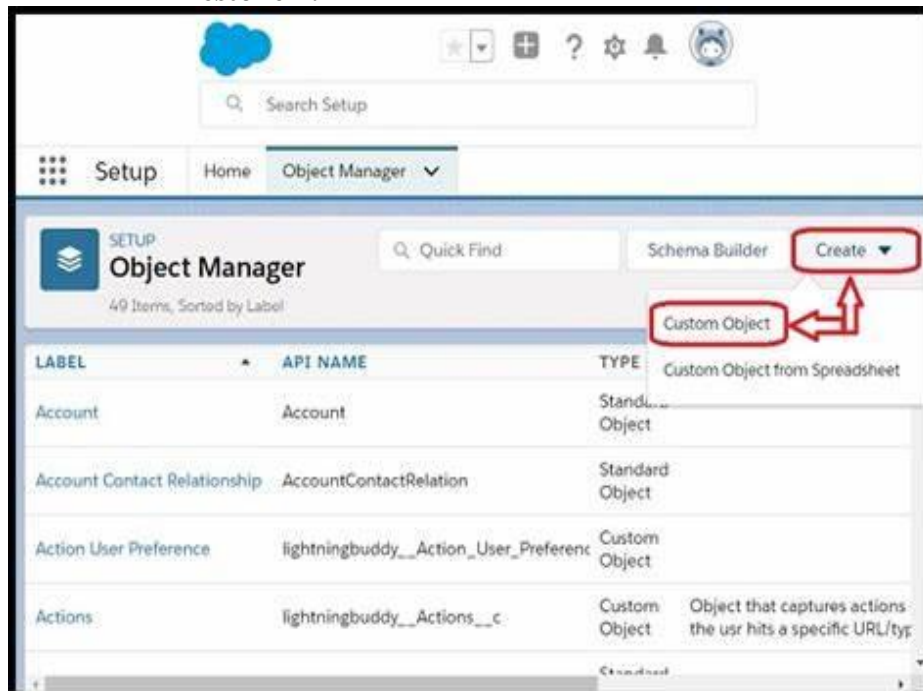
Sign me up >

Creating Developer account

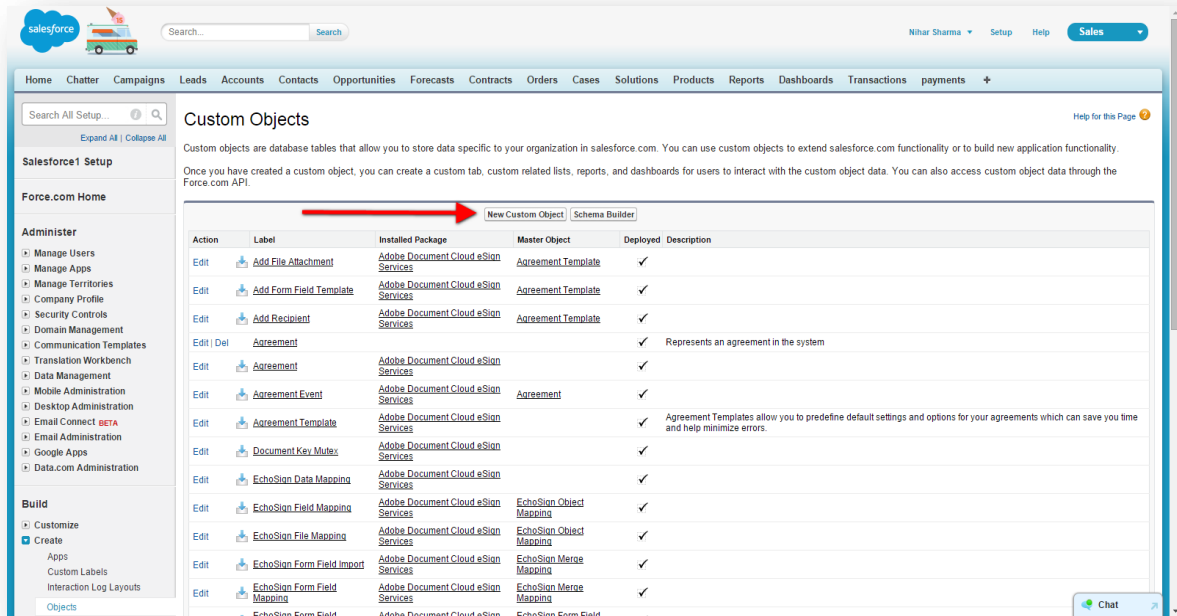


Creation of Salesforce Account

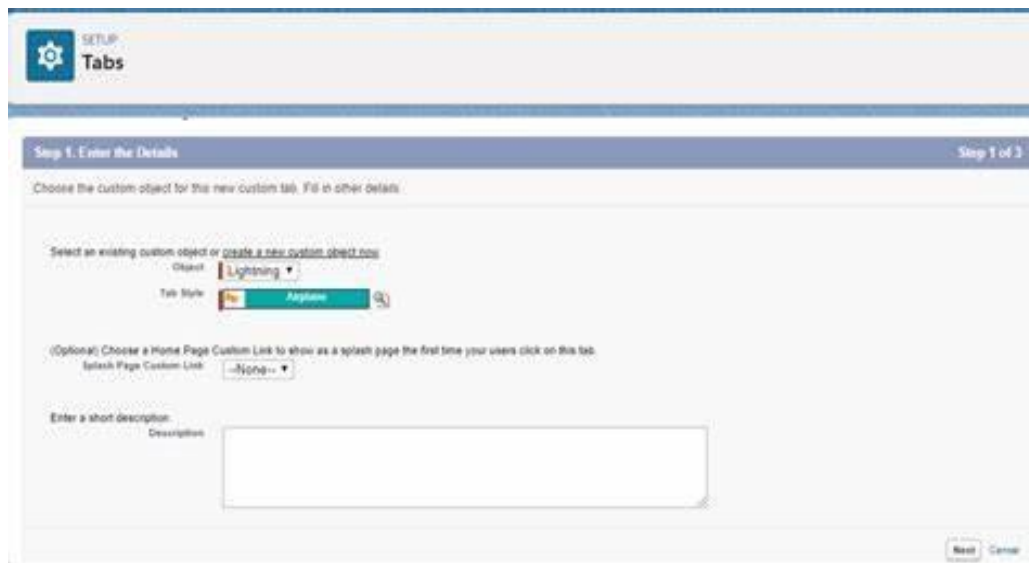
Milestone 2:



Object

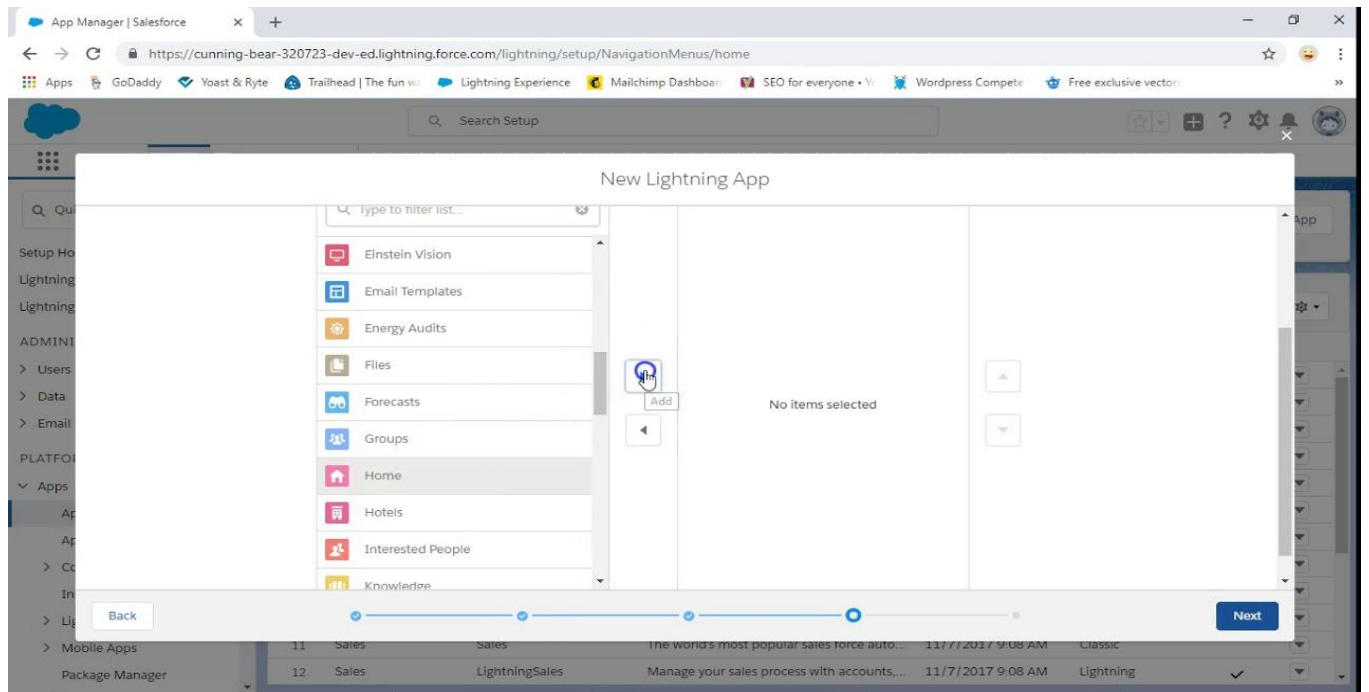
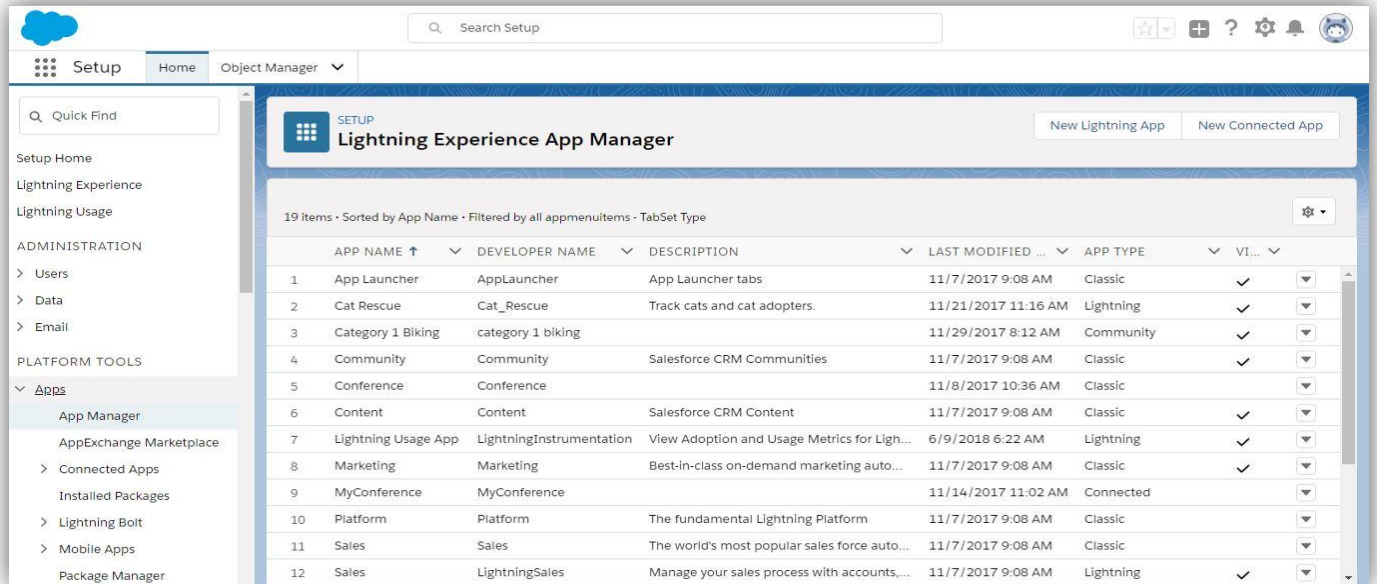


Creation of school, student and parent object



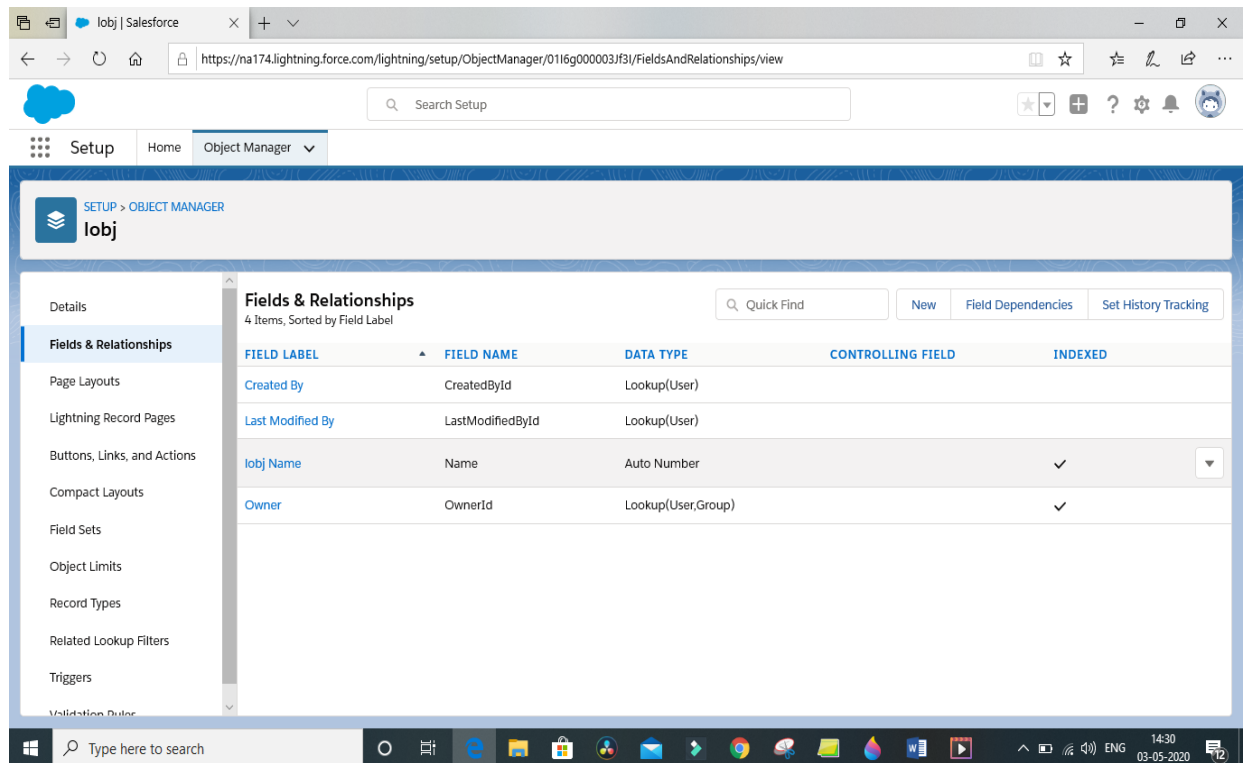
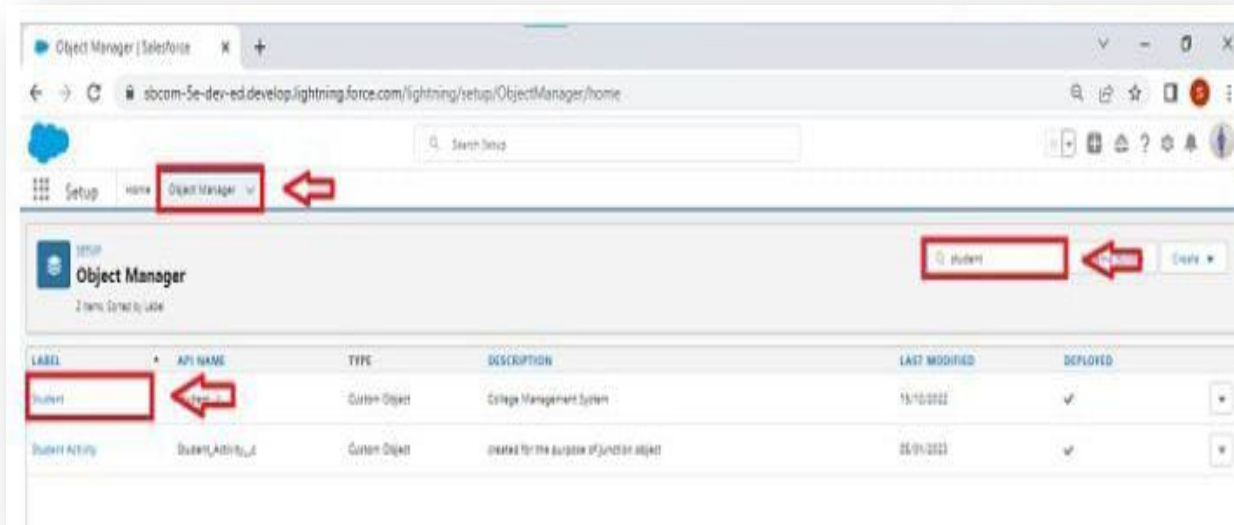
Creation of tab

Milestone 3:

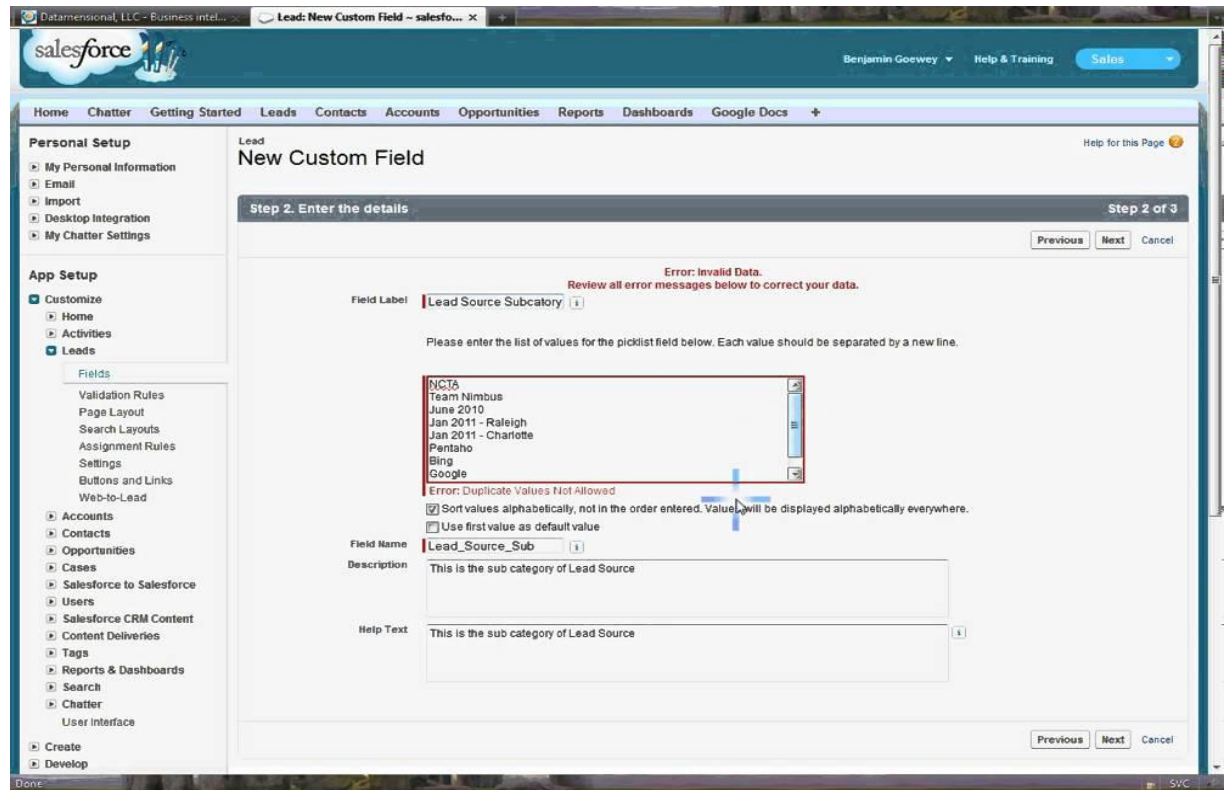


Creation of school management app

Milestone 4 :



Creation of Fields



Step 2. Enter the details

Error: Invalid Data.
Review all error messages below to correct your data.

Field Label: Lead Source Subcategory

Please enter the list of values for the picklist field below. Each value should be separated by a new line.

NCTA
Team Nimbus
June 2010
Jan 2011 - Raleigh
Jan 2011 - Charlotte
Pentaho
Bing
Google

Error: Duplicate Values Not Allowed

☒ Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

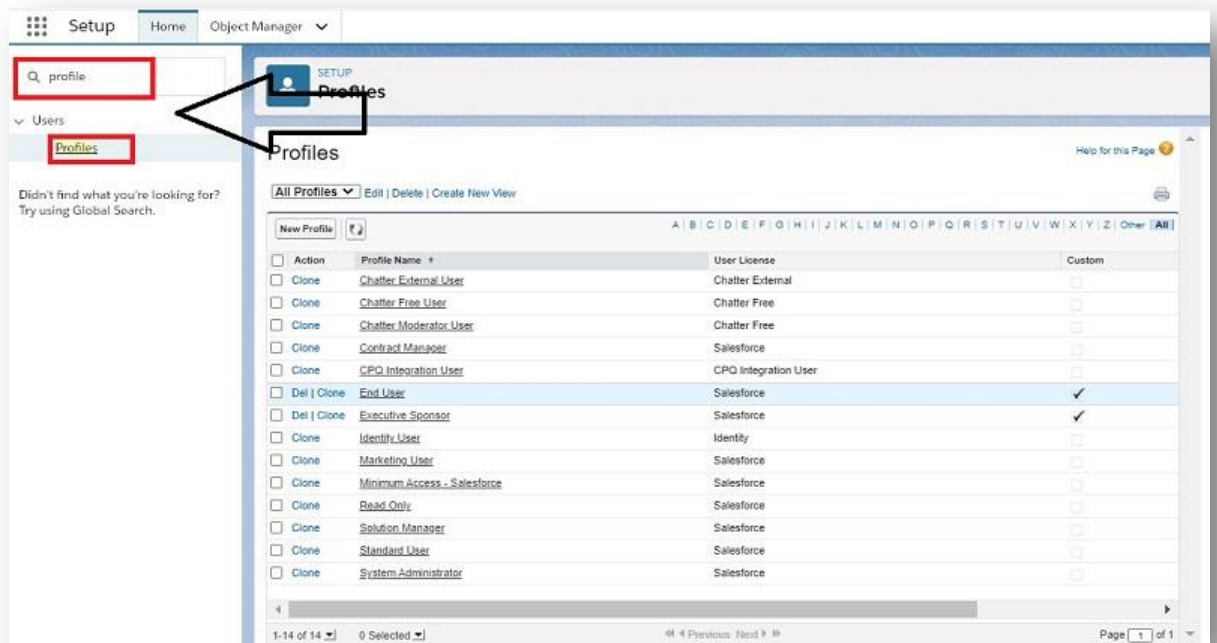
☐ Use first value as default value

Field Name: Lead_Source_Sub

Description: This is the sub category of Lead Source

Help Text: This is the sub category of Lead Source

Milestone 5:



Setup | Home | Object Manager

Search: profile

Profiles

All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	CPQ Integration User	CPQ Integration User	<input type="checkbox"/>
<input checked="" type="checkbox"/> Del Clone	End User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Del Clone	Executive Sponsor	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Read Only	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-14 of 14 | 0 Selected | Page 1 of 1



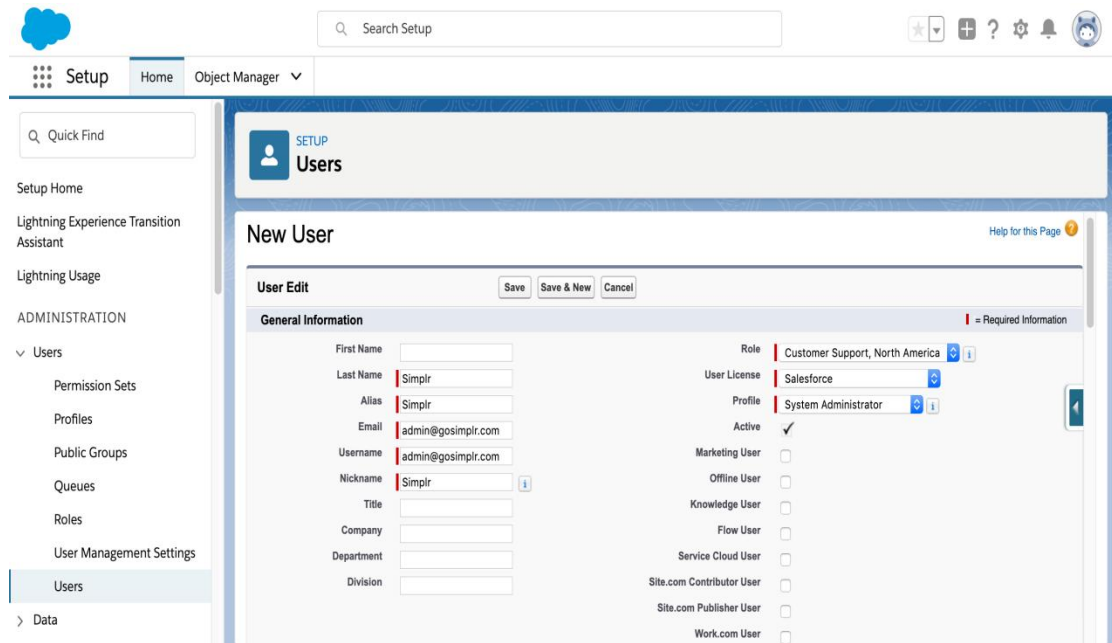
SETUP Profiles

Standard Object Permissions

[illegible]

Milestone 6:

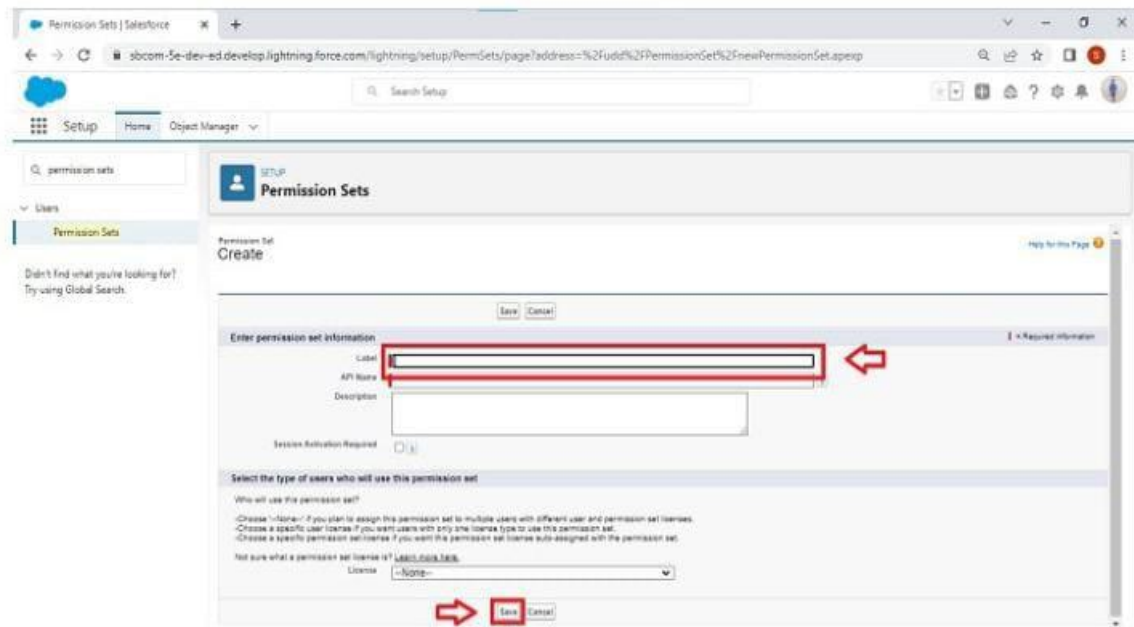
The screenshot displays the Salesforce 'Users' management interface. In the top navigation bar, the 'Users' link is highlighted with a red box and an arrow. The left sidebar contains a 'Users' link, also highlighted with a red box and an arrow. The main content area shows a list of users with columns for checkboxes, alias, full name, email, username, role, and active status. The 'New User' button is highlighted with a red box and an arrow. The user list includes entries for 'Liam', 'Robert Ash', 'Cheryl Sirois', 'Doretha, Eli', 'Hester, Arnie', 'Hester, Mary', 'Eck, Lucas', 'Logan, Amanda', 'Logan, Amanda', 'Suzuki, Patricia', 'Toshi, Shiro', and 'Imahara, John Shiro'.



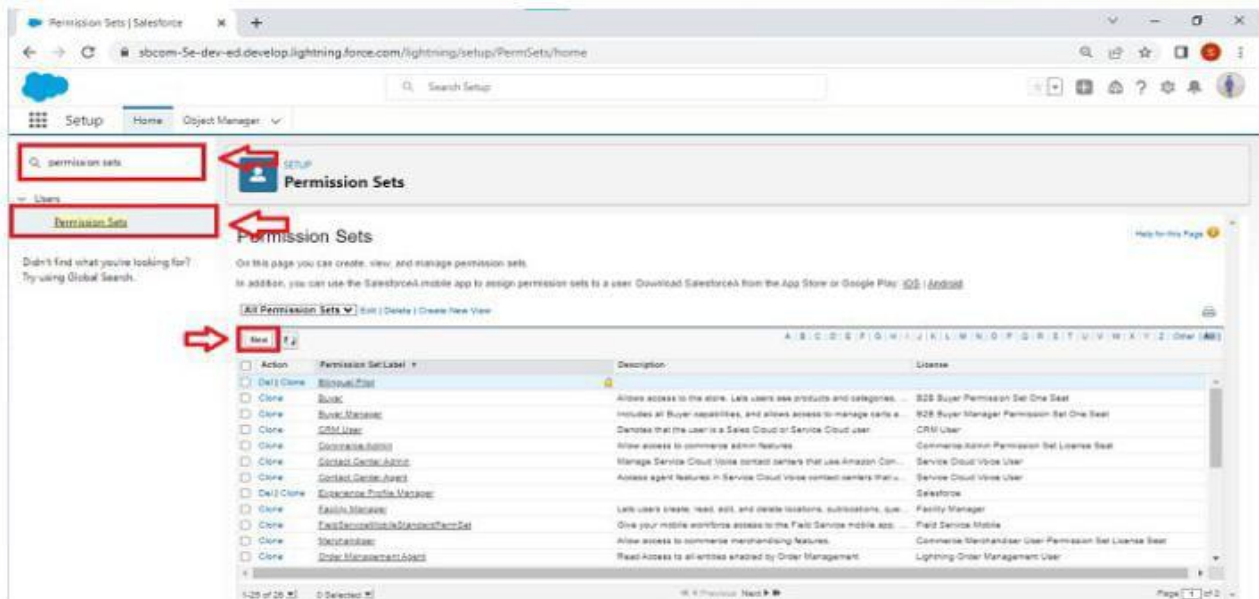
The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION, Users (selected), Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Data. The main content area is titled 'New User' and contains a 'User Edit' form. The form has tabs for 'General Information' and 'Permissions'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. There are also dropdown menus for Role, User License, and Profile. The 'Permissions' section includes checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and Work.com User. A red arrow points to the 'Save' button.

Creating A Users

Milestone 7:



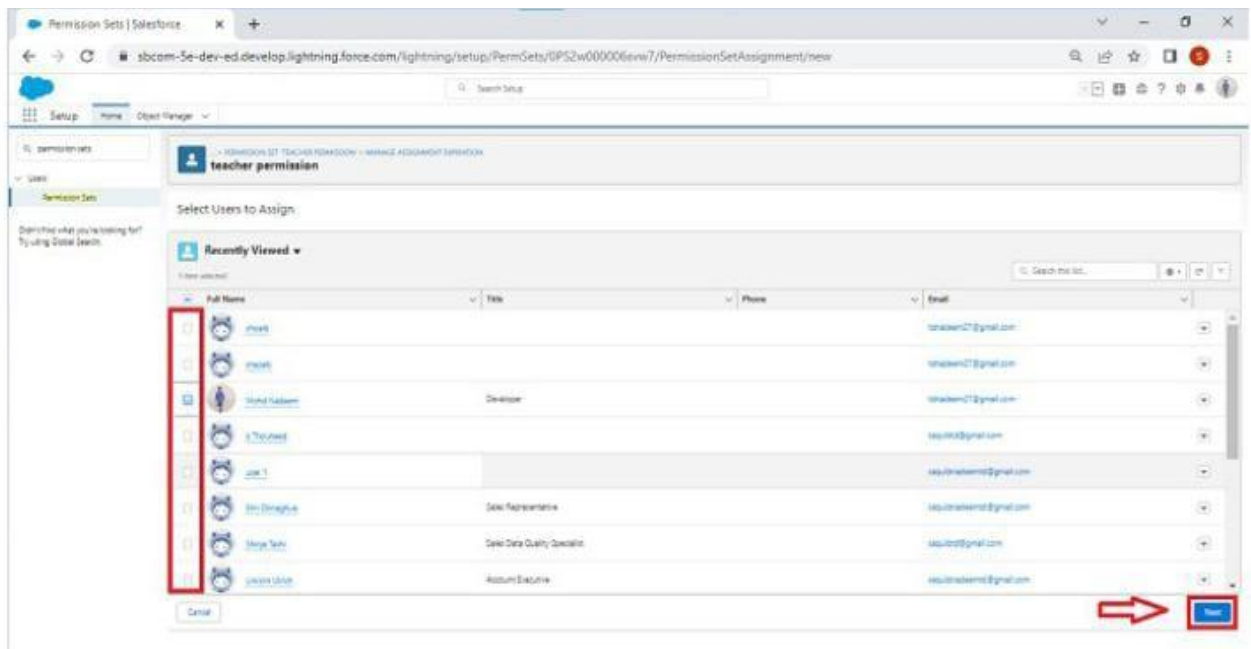
The screenshot shows the Salesforce Setup interface for 'Permission Sets'. The left sidebar contains navigation links: Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION, Users, Permission Sets (selected), Profiles, Public Groups, Queues, Roles, User Management Settings, and Data. The main content area is titled 'Permission Sets' and contains a 'Create' form. The form has tabs for 'Enter permission set information' and 'Select the type of users who will use this permission set'. The 'Enter permission set information' tab is active, showing fields for Label, API Name, and Description. There is a checkbox for 'Session Retention Required'. The 'Select the type of users who will use this permission set' section includes a dropdown menu for 'License' with a red arrow pointing to it. A red arrow points to the 'Save' button.



Permission Sets 1 and 2

Milestone 8:

Reports



4.TRIALHEAD PROFILE PUBLIC URL

Team Leader: <https://github.com/devayanibalaji/A-CRM-Application-for-Schools-Colleges.git>

Team Member 1: <https://github.com/santhiyabalaiya/A-CRM-Application-for-Schools-Colleges.git>

Team Member 2: <https://github.com/sowmiyakavya/A-CRM-Application-for-Schools-Colleges.git>

5 ADVANTAGES & DISADVANTAGES

- ✓ It is useful for recruiting employees.
- ✓ It is handle by all the persons of the Institution.
- ✓ Less expenses for creating this app.
- ✓ It is not a popular in all countries.

6 APPLICATIONS

- ✓ It used in all companies for recruiting .
- ✓ It helps to pick a more data about the employee.
- ✓ Mostly it is used for a big companies.

7 CONCLUSION

- ✓ To enhance the efficiency of the app.

8 FUTURE SCOPE

In the 21st century each and every field is computerized and all works are doneby using the modern technologies so it has a good future.

