

A CPM APPLICATION FOR SCHOOLS/COLLEGES

1 INTRODUCTION:

1.1 Overview

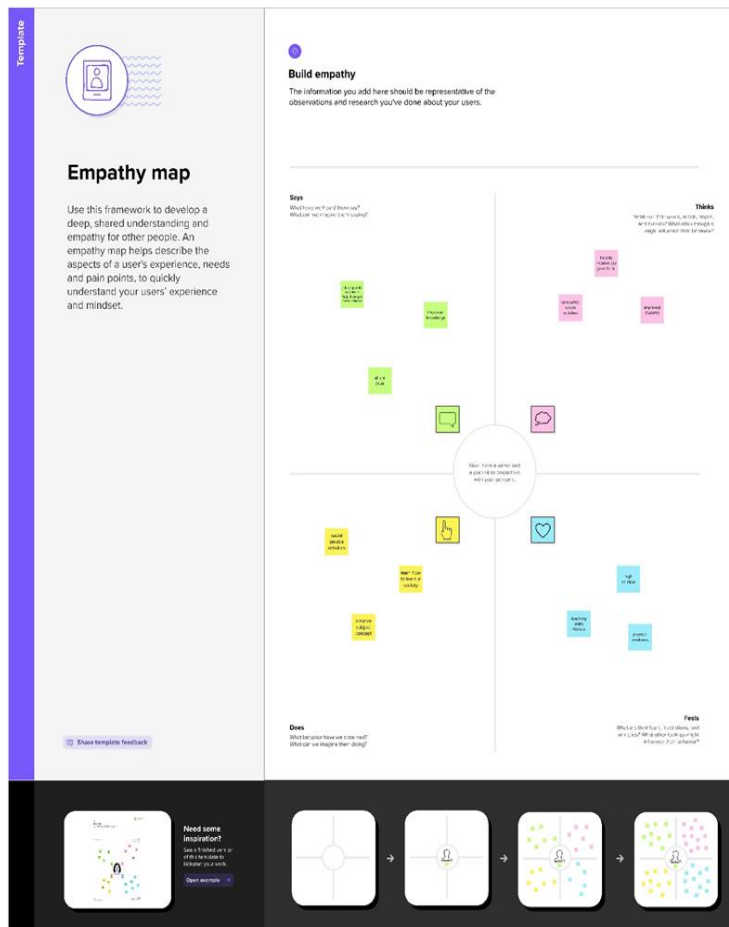
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project.

1.2 Purpose

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.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



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2.2 IDEATION & BRAINSTORMING MAP

The interface is a horizontal scrollable workspace for ideation and brainstorming, divided into seven main panels. Each panel has a title, instructions, and interactive elements.

- Brainstorm & idea prioritization:** Includes a lightbulb icon and instructions to use the workspace to brainstorm ideas and prioritize them. It features a grid of 12 yellow sticky notes.
- Before you collaborate:** Contains instructions on how to prepare for collaboration, including defining the problem and setting goals. It includes a diagram of a team structure.
- Define your problem statement:** Features a large text area for defining the problem statement, with a diagram showing the relationship between the problem and the solution.
- Brainstorm:** Includes a grid of 12 yellow sticky notes for brainstorming ideas. It also features a diagram showing the relationship between the problem and the solution.
- Group ideas:** Contains a diagram showing the relationship between the problem and the solution, with a focus on grouping ideas.
- Prioritize:** Features a grid of 12 yellow sticky notes for prioritizing ideas. It also includes a diagram showing the relationship between the problem and the solution.
- After you collaborate:** Includes instructions on how to follow up after collaboration, including sharing ideas and implementing solutions. It features a diagram showing the relationship between the problem and the solution.

At the bottom of the interface, there is a row of icons representing different tools and features, such as a grid, a list, a diagram, and a search function.

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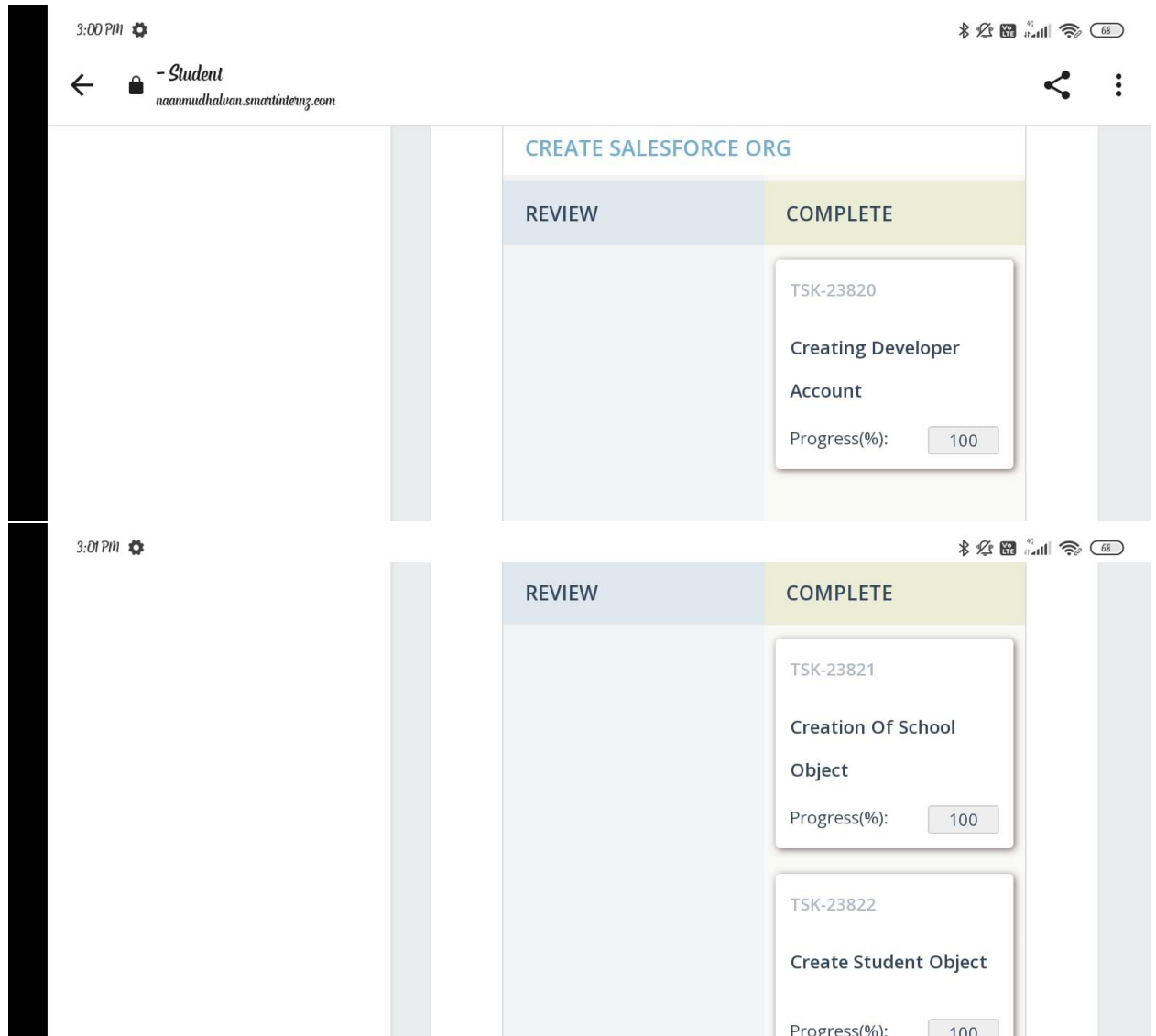
3 RESULT

3.1 DATA MODEL:

OBJECT NAME	FIELDS IN THE OBJECT	
SCHOOL	FIELD LABEL	DATA TYPE
	PHONE NUMBER	PHONE
	SCHOOL NAME	TEXT(80)
STUDENT	FIELD LABEL	DATA TYPE
	MARKS	NUMBER
	STUDENT NAME	TEXT
PARENT	FIELD LABEL	DATA TYPE
	PARENT NAME	TEXT(80)
	PARENT NUMBER	PHONE

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3.2 ACTIVITY & SCREENSHOT



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3:02 PM

Bluetooth

Wi-Fi

4G

Signal

68

←

Student

naannudhalwan.smartinternz.com

Share

More

LIGHTNING APP

FIELDS AND RELATIONSHIP

REVIEW

COMPLETE

TSK-23825

Creation Of Fields For
The School Objects

Progress(%): 100

Guided Project

Project Workspace

Chat with Mentor

Project Title : Implementing CRM for Result tracking of a candidate with internal marks


NM Id : 4B78A8EABCC8F61B6E0410819A5D32A5

Industry Mentor(s) : Mentor-Salesforce Name

Project Progress

100%

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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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules


Triggers

Fields & Relationships

8 Items, Sorted by Field Label

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)		
highest marks	highest_marks__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
number of students	number_of_students__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
PHONE NUMBER	PHONE_NUMBER__c	Phone		
SCHOOL Name	Name	Text(80)		✓



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Owner	OwnerId	Lookup(User,Group)		✓
PARENT ADDRESS	PARENT_ADDRESS__c	Text Area(255)		
PARENT Name	Name	Text(80)		✓
PARENT NUMBER	PARENT_NUMBER__c	Phone		

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Custom Object Definition Edit

Save

Save & New

Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

LabelSTUDENTExample: Account

Plural LabelSTUDENTExample: Accounts

Starts with vowel sound☐

The Object Name is used when referencing the object via the API.

Object NameSTUDENTExample: Account

Description

Context-Sensitive Help Setting☒ Open the standard Salesforce.com Help & Training window☐ Open a window using a Visualforce page

Content Name--None--

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record NameSTUDENT NameExample: Account Name

Data TypeText

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8 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)		
Last Modified By	LastModifiedById	Lookup(User)		
MARKS	MARKS__c	Number(18, 0)		
PHONE NUMBER	PHONE_NUMBER__c	Phone		
result	result__c	Picklist		
SCHOOL	SCHOOL__c	Master-Detail(SCHOOL)		✓
STUDENT Name	Name	Text(80)		✓

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The image displays two screenshots of a Salesforce application interface, specifically for a custom object named 'STUDENT'.

Top Screenshot: New Custom Object Setup

- Page Title:** New Custom Object | Salesforce
- URL:** `governmentartsandsience-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`
- Navigation:** Setup, Home, Object Manager
- Search:** Search Setup
- Search Dropdown:** Search apps and items...
 - Apps
 - Service
 - Marketing
 - Community
 - SCHOOL MANAGEMENT**
 - Salesforce Chatter
 - Content
 - Sales Console
 - View All
- Form Fields:**
 - by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)
 - Save Save & New Cancel
 - and reports. Example: Account
 - Example: Accounts
 - The Object Name is used when referencing the object via the API. Object Name Example: Account
 - Description
- Footer:** Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window

Bottom Screenshot: Recently Viewed List

- Page Title:** Recently Viewed | STUDENT | Salesforce
- URL:** `governmentartsandsience-1e-dev-ed.develop.lightning.force.com/lightning/o/STUDENT__c/list?filterName=Recent`
- Navigation:** SCHOOL MANAGE... SCHOOL STUDENT PARENT Reports Dashboards
- Search:** Search...
- STUDENT Recently Viewed**
 - 0 items • Updated a minute ago
 - Search this list...
 - New Import
 - STUDENT Name
- Message:** You haven't viewed any STUDENT recently. Try switching list views.

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SCHOOL | Salesforce

governmentartsandscience-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003nOuO/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
SCHOOL

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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highest marks	highest_marks__c	Number(18, 0)		
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number of students	number_of_students__c	Number(18, 0)		
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PHONE NUMBER	PHONE_NUMBER__c	Phone		
SCHOOL Name	Name	Text(80)		✓

STUDENT | Salesforce

governmentartsandscience-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003nOyv/FieldsAndRelationships/view

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PHONE NUMBER	PHONE_NUMBER__c	Phone		
result	result__c	Picklist		
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STUDENT Name	Name	Text(80)		✓

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PARENT | Salesforce

governmentartsandscience-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003nOzF/FieldsAndRelationships/view

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STUDENT | Salesforce

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SCHOOL | Salesforce

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SCHOOL Name	Name	Text(80)		✓

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4 TRIALHEAD PROFILE PUBLIC URL

TEAM LEAD – <https://trailblazer.me/id/sravi484>

TEAM MEMBER 1- <https://trailblazer.me/id/sraja720>

TEAM MEMBER 2- <https://trailblazer.me/id/aaadhi3>

TEAM MEMBER 3- <https://trailblazer.me/id/keerp26>

TEAM MEMBER 4- <https://trailblazer.me/id/kalam101>

5 ADVANTAGES & DISADVANTAGE

ADVANTAGES OF THE PROPOSED SOLUTION:

- i) This Project helps you to maintain and manage the school related problems which further can be modified based on the requirements
- ii) It enable schools to track interactions with students and their parents, and provides a platform for personalised communication.
- iii) This can help schools maintain a positive image and build stronger relationship within the community.

DISADVANTAGES OF THE PROPOSED SOLUTION:

- i) This software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on the investment is worth it.
- ii) It is fully automated tool that has prevented human intervention. It automatically collects all the data and processes it.
- iii) It can be accessed by third party.

6 APPLICATIONS:

- i) Build a mobile-friendly application portal to allow parents to apply and upload documents, sign forms, check application status, take virtual campus tours, and make payments online.
- ii) Real Time Visibility of each school with complete enquiry to enrolment funnel mapping.
- iii) Take Corrective Measures on run time know that is working and what is not with scorecards.
- iv) Empower your teams to convert more with parent sentiment analysis and potential mapping in just a few clicks.

7 CONCLUSION:

Business is an ongoing process that has to update itself with time to remain in the competition. Before technology, customer data or CPM was based on papers, but slowly, companies started tracking customer-related data with spreadsheets, emails, address books, and other ways.

It would probably be particularly difficult to develop and install customer centric strategies.

8 FUTURE SCOPE:

These days, numerous small and medium-sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement to this software. However, the preferences and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.

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