



# GOVERNMENT OF TAMILNADU

Naan Muthalvan - Project-Based Experiential Learning

## A CRM APPLICATION FOR SCHOOLS/COLLEGES

Submitted by

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M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

(Affiliated To Mother Teresa Women's University,  
Kodaikanal)

Reaccredited with **A** Grade by NAAC  
DINDIGUL-624001.

**APRIL - 2023**

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**Dindigul - 624 001**



**PG & RESEARCH DEPARTMENT OF Mathematics**

**BONAFIDE CERTIFICATE**

This is to certify that this is a bonafide record of the project entitled, **A CRM Application for Schools/Colleges** done by Ms.P. VINOTHINI -(20321TR035), Ms.S. SUGANYA -(20321TR032) , Ms.K.SWETHA -(20321TR033) , Ms.V.SWETHA -(20321TR034). This is submitted in partial fulfillment for the award of the degree of Bachelor of Science in Computer Science in **M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL** during the period of December 2022 to April 2023

**Project Mentor(s)**

**Head of the Department**

Submitted for viva-voce Examination held on \_\_\_\_\_

**INTERNAL EXAMINER  
EXAMINER**

**EXTERNAL**

# A CRM APPLICATIONS OF SCHOOLS AND COLLEGE

## 1. INTRODUCTION

### 1.1 Overview:

First, let's define CRM is – customer relationship management.

CRM higher education technology enables institutions to manage relationships with all of their customers (including students, alumni, faculty, staff, and corporate partners) and connect insights from those interactions in a unified view.

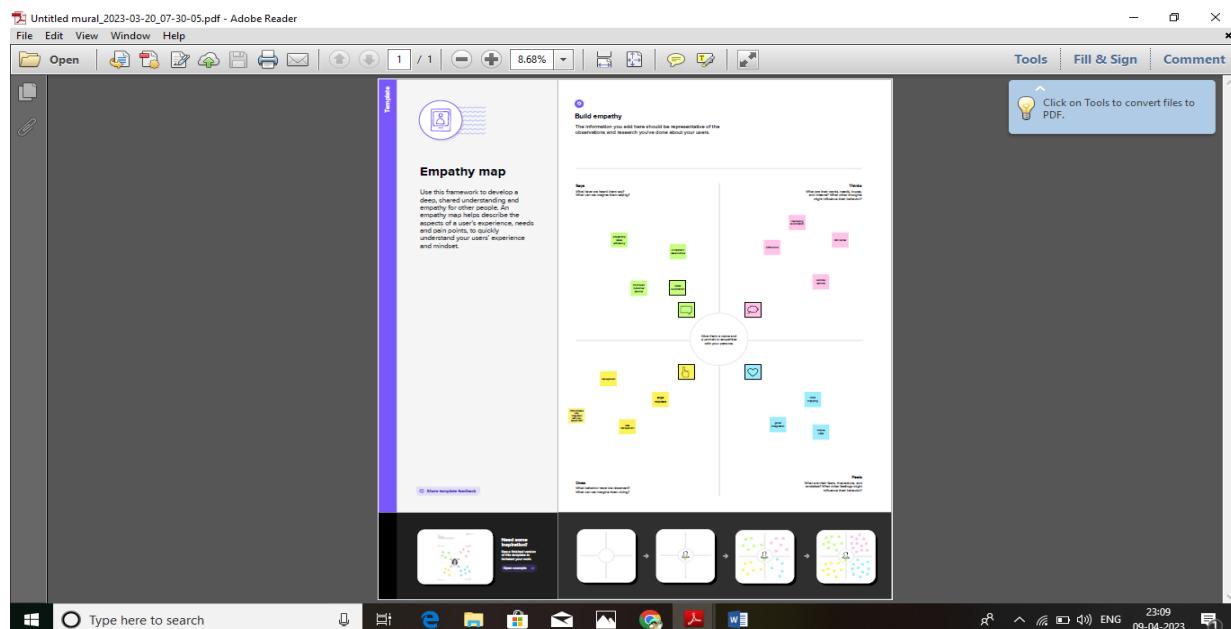
The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain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

### 1.2 Purpose:

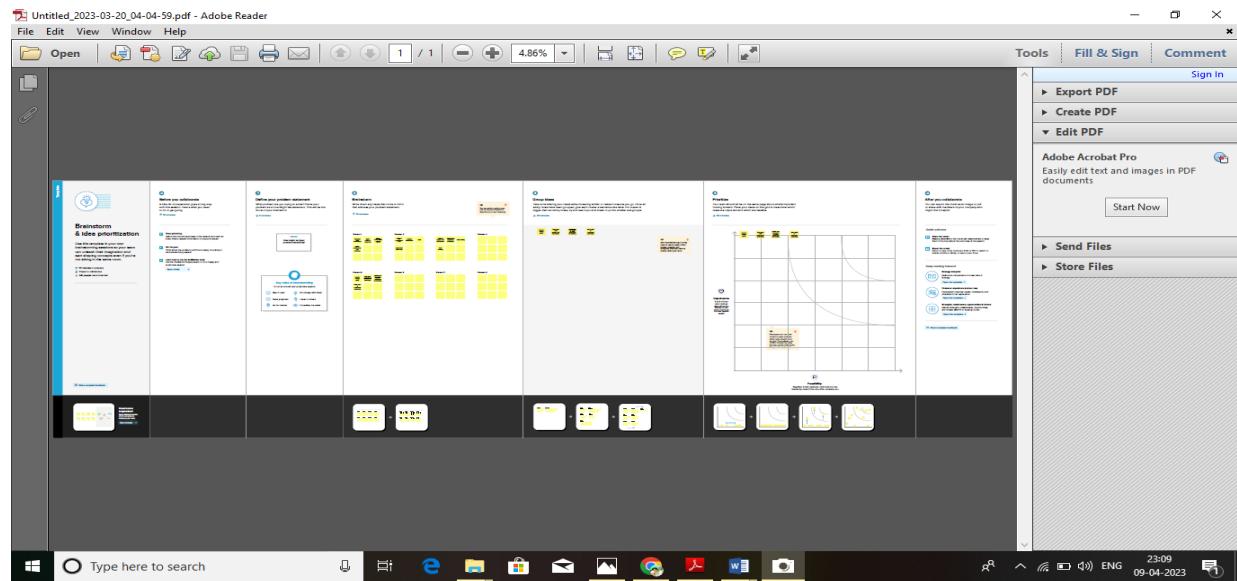
- Improve Student Admissions Lifecycle...
- Track Student Life – Cycle Within the Institution...
- Keep Alumni Information Safe and Accessible...
- Stay Connected with Teams...
- Monitor Fee Payments and Reminders
- Student Record Maintenance
- Online Registration
- Online Fees Payment Provision
- Cloud – Based ERP

## 2. Problem Definition & Design Thinking

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming map



Object Name	Fields in the object	
School	Field Label	Data type
	Address	Text Area
	Phone Number	Phone
	Number of Students	Roll-up summary
	Highest Marks	Roll-up summary
Student	Field Label	Data Type
	Phone Number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number
Parent	Field Label	Data type
	Parent Address	Text Area
	Parent Number	Phone

## **3.2 Activity & Screenshots**

### **Milestone-1:**

#### **Introduction**

**Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.**

#### **Activity: Creating Developer Account**

##### **Creating Developer Account**

**Creating a developer org in salesforce.**

- 1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)**
- 2. Click on sign up.**
- 3. On the signup form, enter the following details:**
  - a) First name & Last name**
  - b) Email**
  - c) Role: Developer**
  - d) Company: College Name**
  - e) Postal Code: Pin code**
  - f) Username: should be a combination of your name and company This need not be an actual email id, you can give anything in the format:  
[username@organization.com](mailto:username@organization.com)**
- 4. Click on sign up after filling these.**

#### **Account Activation**

**Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10 mins, as**

#### **Login To Your Salesforce Account**

- 1. Go to [salesforce.com](https://www.salesforce.com) and click on login.**
- 2. Enter the username and password that you just created.**
- 3. After login this is the home page which you will see.**

## **Milestone-2:**

### **Activity-1:**

#### **Creation of School Object**

#### **Creation of Objects for School Management:**

For this school management we need to create 3 objects i.e., school, parents and students.

The below steps will assist you in creation those objects.

1. Click on the gear icon and then select setup
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object
  - On the custom Object Definition page, create the object as follows:
  - Label: School
  - Plural Label: Schools
  - Record Name: School Name
  - Check the Allow Reports checkbox
  - Check the Allow Search checkbox
  - Click Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new object is being created with the following details:

- Label:** Student
- Plural Label:** Students
- Object Name:** Students
- Description:** (Empty text area)

The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Record Types. The top navigation bar includes links for Home, Object Manager, and a search bar.

The screenshot shows the Salesforce Object Manager interface for the 'School' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and shows the following fields:

Field	Value
Description	
API Name	School__c
Custom	✓
Singular Label	School
Plural Label	Schools
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area are 'Edit' and 'Delete' buttons.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and Select Tabs. Under Custom Tabs, click New.

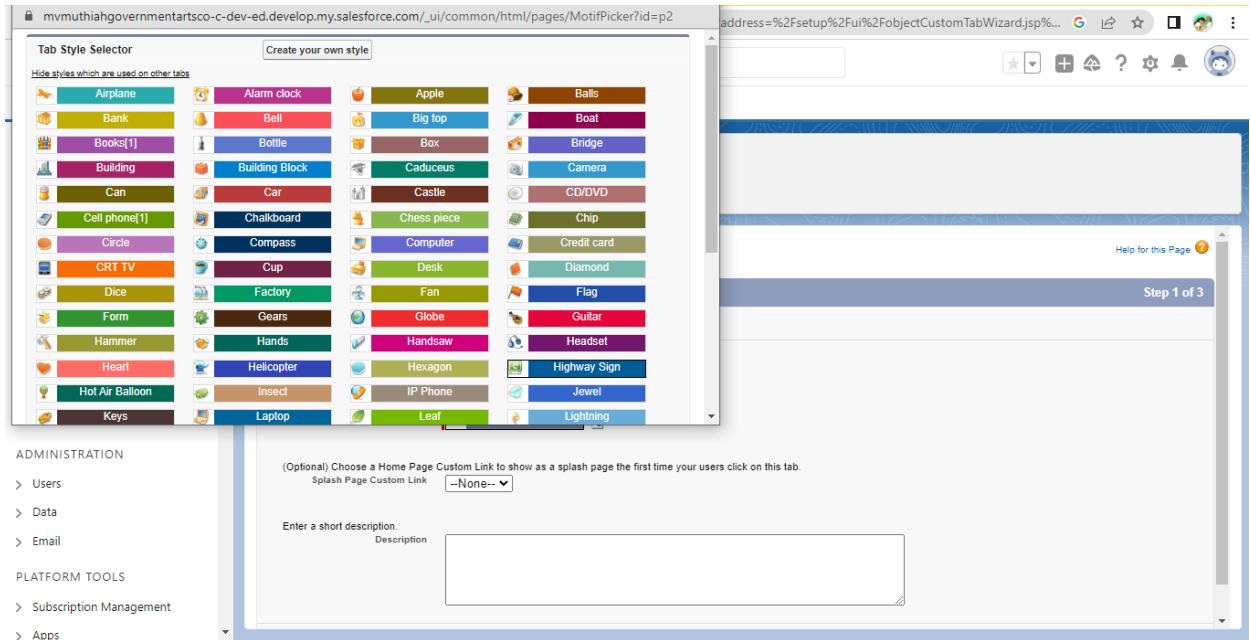
1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

The screenshot shows the 'New Custom Object Tab' setup page. The left sidebar includes 'Quick Find', 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION' (with sub-options for Users, Data, Email), 'PLATFORM TOOLS' (with sub-options for Subscription Management, Apps), and a 'Clipboard' section at the bottom right.

The main content area is titled 'Step 1. Enter the Details' and contains the following fields:

Setting	Value
Select an existing custom object or <a href="#">create a new custom object now</a> .	
Object	-None--
Tab Style	(dropdown menu)
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.	Splash Page Custom Link -None--
Enter a short description.	Description (text input field)

A progress bar at the top right indicates 'Step 1 of 3'.

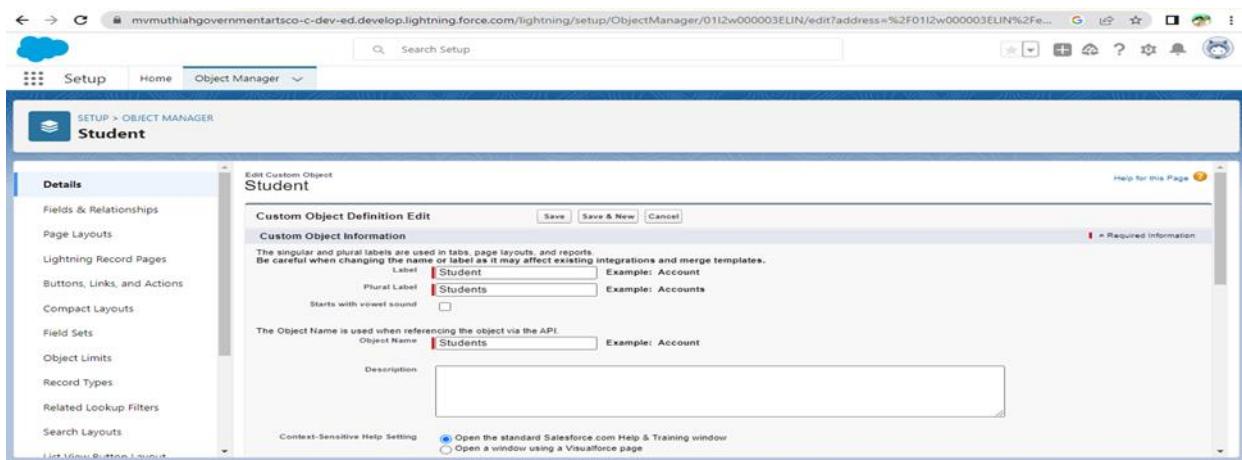


In the same way create other objects such as students and parents.

## Activity 2:

### Creation of Students Object:

1. Click on the gear icon and then select setup
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object
  - On the custom Object Definition page, create the object as follows:
  - Label: Student
  - Plural Label: Students
  - Record Name: Student Name
  - Check the Allow Reports checkbox
  - Check the Allow Search checkbox
  - Click Save.



Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and Select Tabs. Under Custom Tabs, click New.

1. For Object, select Student.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

The screenshot shows the Salesforce Setup interface for creating a new custom tab. On the left, the 'Tab Style Selector' displays a grid of icons for various objects like Airplane, Alarm clock, Apple, Ball, etc. The 'Student' icon is selected. On the right, the 'Custom Tabs' wizard is open at Step 1 of 3. It includes fields for choosing a home page custom link and entering a short description. The URL in the address bar is `mvmuthiahgovernmentartsco-c-dev-ed.develop.my.salesforce.com/_ui/common/html/pages/MotifPicker?id=p2`.

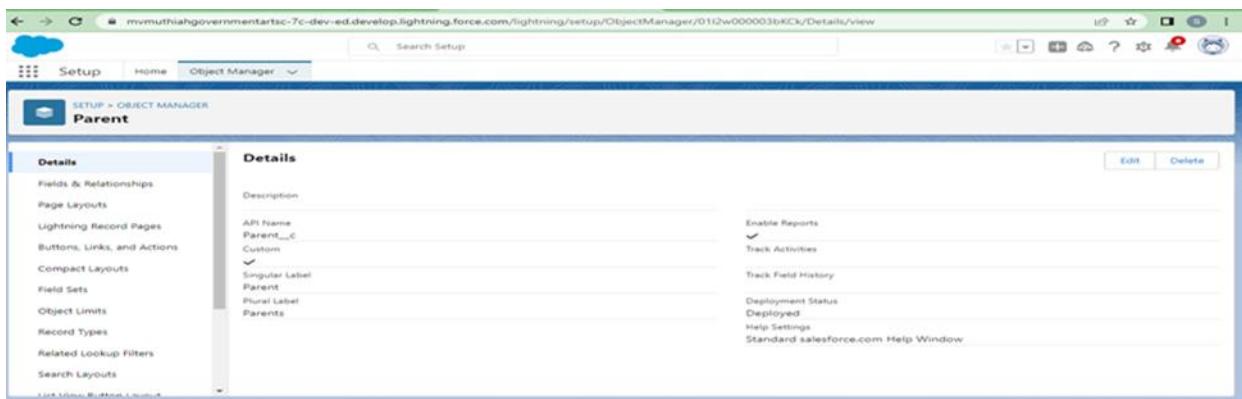
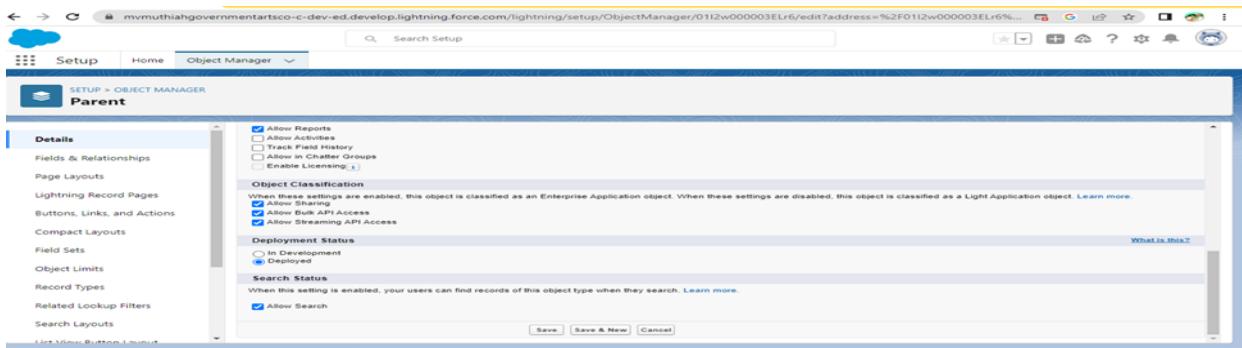
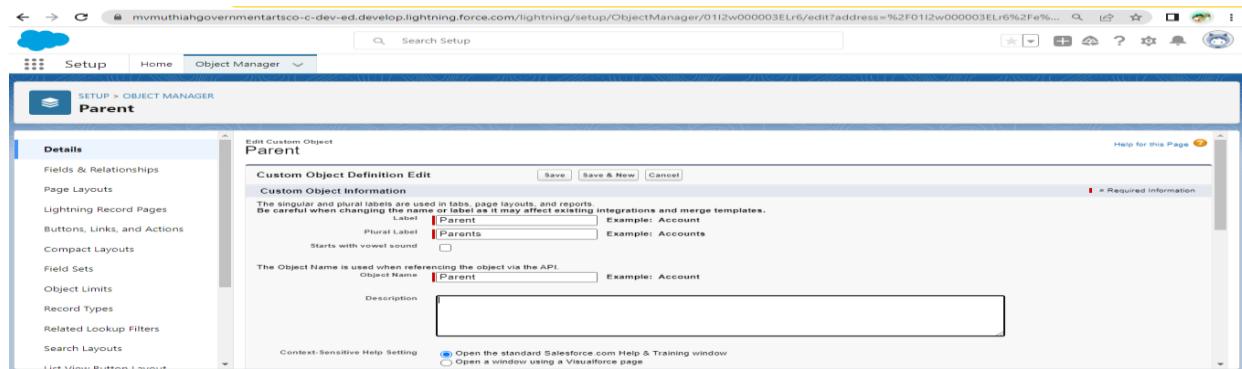
The screenshot shows the Salesforce Setup interface for managing the 'Student' object. The 'Object Manager' section is open, showing the 'Details' tab. It lists various configuration options such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Deployment Status' section indicates the object is 'Deployed'. The 'Search Status' section shows 'Allow Search' is checked. The URL in the address bar is `mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i2w000003ELIN/edit?address=%2F01i2w000003ELIN%2Fe...`.

The screenshot shows the Salesforce Setup interface for managing the 'Students' object. The 'Object Manager' section is open, showing the 'Details' tab. It lists various configuration options such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section on the right shows the API name is 'Students\_\_c', with singular and plural labels both set to 'Students'. Deployment status is 'Deployed'. The URL in the address bar is `mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i2w000003bKCB/Details/view`.

## Activity 2:

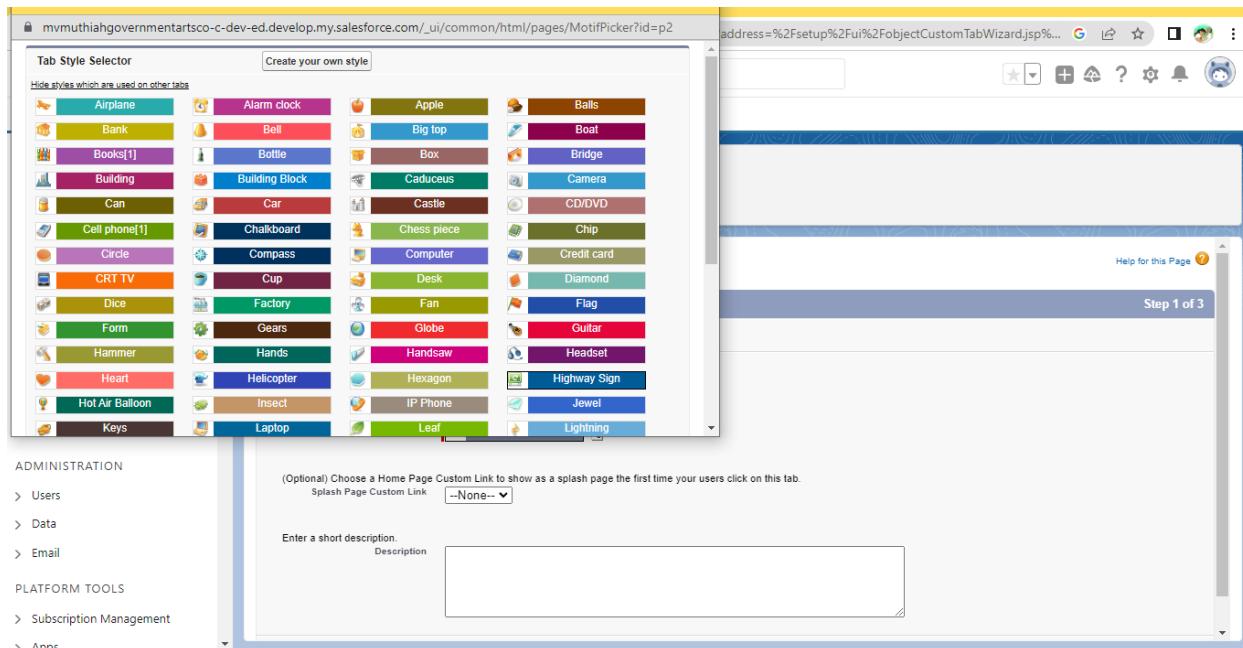
### Creation of Parent Object:

1. Click on the gear icon and then select setup
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object
  - On the custom Object Definition page, create the object as follows:
    - Label: Parent
    - Plural Label: Parents
    - Record Nam: Parent Name
    - Check the Allow Reports checkbox
    - Check the Allow Search checkbox
    - Click Save.



Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and Select Tabs. Under Custom Tabs, click New.

1. For Object, select Parent
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

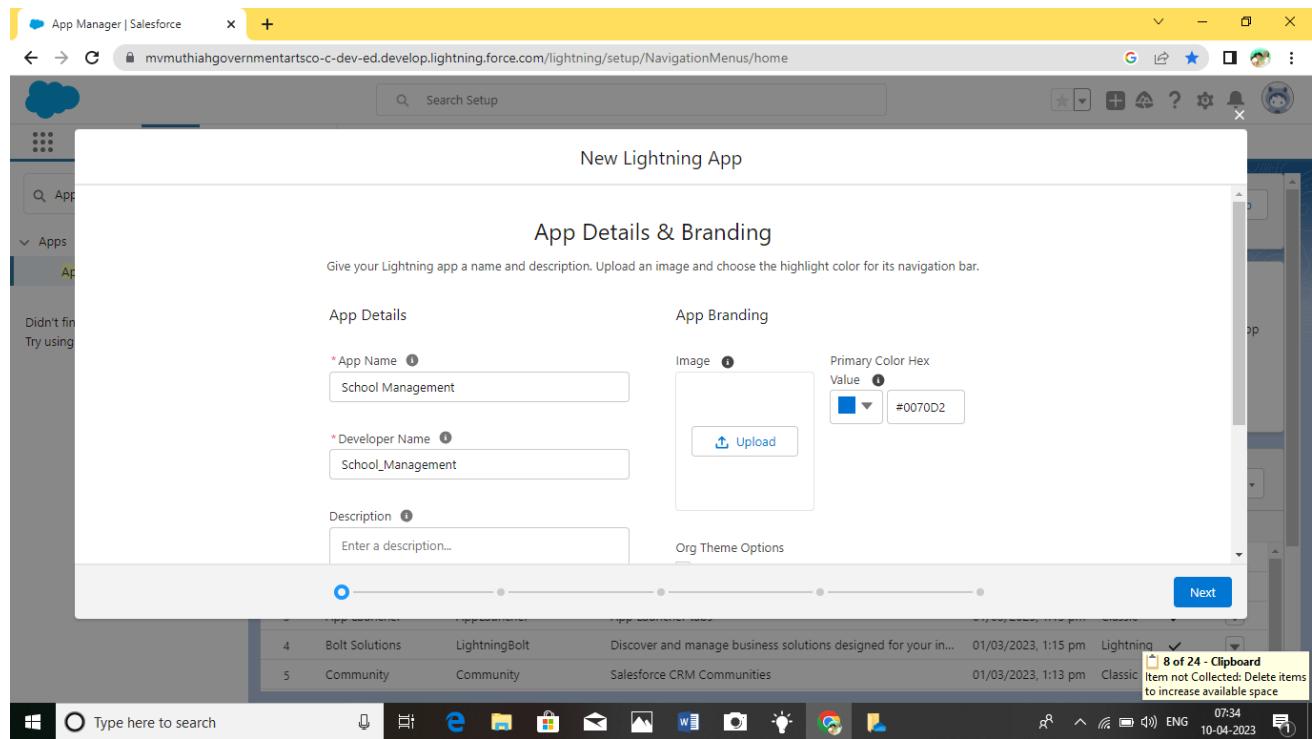


## Milestone – 3: Lightning App

### **Activity:**

#### **Create the School Management app**

- From Setup, enter App Manager in the Quick Find and Select App Manager.
- Click New Lightning App. Enter School Management as the App Name, then click next.



- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From available Profiles, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.

[mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home](https://mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home)

## New Lightning App

### App Options

**Navigation and Form Factor**

- Navigation Style**
  - Standard navigation
  - Console navigation
- Supported Form Factors**
  - Desktop and phone
  - Desktop
  - Phone

**Setup and Personalization**

- Setup Experience**
  - Setup (full set of Setup options)
  - Service Setup
- App Personalization Settings**
  - Disable end user personalization of nav items in this app
  - Disable temporary tabs for items outside of this app

Back      Next

8 of 24 - Clipboard Item not Collected: Delete items to increase available space

[mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home](https://mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home)

## New Lightning App

### Utility Items (Desktop Only)

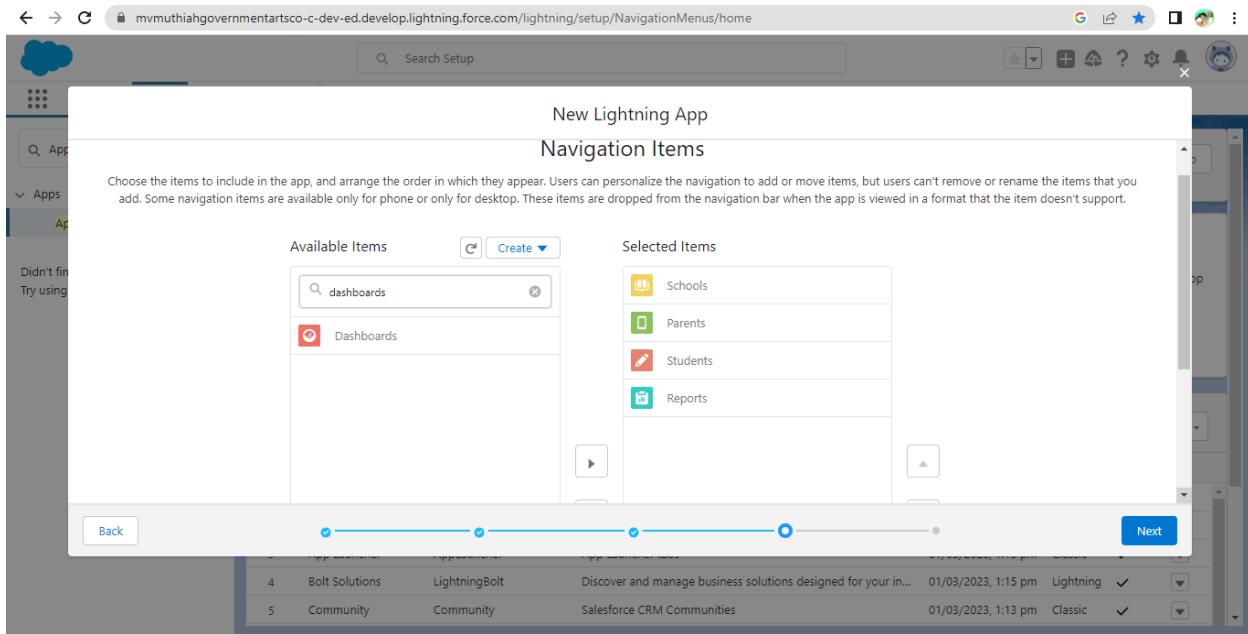
Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item      Utility Bar Alignment: Default

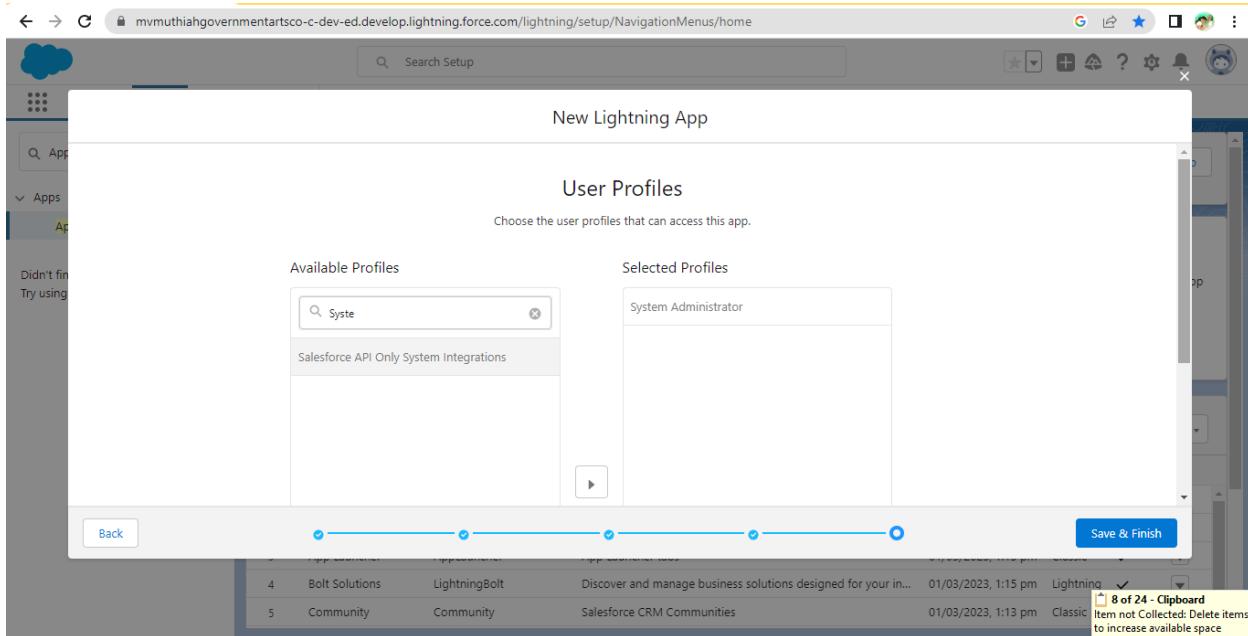
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

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1. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



2. To verify your changes, click the App Launcher, type School Management and select the School Management app.

**Note:**

1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

## **Milestone-4: Fields and Relationship**

### **Activity-1:**

#### **Creation of Fields for the School objects:**

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home
3. Select School.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'School' typed in, a 'Schema Builder' button, and a 'Create' button. Below the header, a table lists one item: 'School' with API Name 'School\_\_c' and Type 'Custom Object'. The table includes columns for Label, API Name, Type, Description, Last Modified, and Deployed. A tooltip at the bottom right indicates '8 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

4. Select Fields & Relationships from the left navigation, and click New.

The screenshot shows the 'Details' page for the 'School' object. On the left, a sidebar lists various configuration options: Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main panel displays the 'Details' section for the 'School' object. It includes fields for Description, API Name (set to 'School\_\_c'), Type (set to 'Custom'), Singular Label (set to 'School'), Plural Label (set to 'Schools'), and other settings like Enable Reports (unchecked), Track Activities, Track Field History, Deployment Status (set to 'Deployed'), Help Settings, and Standard salesforce.com Help Window. At the bottom, there are 'Edit' and 'Delete' buttons, and a tooltip at the bottom right indicates '8 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

Now we're ready to make a custom field. Let's do this!

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Address.

### 3. Click Next, Next, then Save & New

The screenshot shows the Salesforce Object Manager interface for the 'School' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a list of field types with their descriptions:

Field Type	Description
Email	Allows users to enter an email address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
<b>Text Area</b>	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted) <small>[i]</small>	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:000" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

At the bottom right of the list, there are 'Next' and 'Cancel' buttons.

The screenshot shows the 'New Custom Field' configuration screen, Step 2 of 4. The left sidebar is identical to the previous screenshot. The main area is titled 'Step 2. Enter the details' and contains the following fields:

Field Label	Value
Field Label	Address <small>[i]</small>
Field Name	Address <small>[i]</small>
Description	(empty text area)
Help Text	(empty text area)
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity <small>[i]</small>
Default Value	Show Formula Editor <small>[i]</small>

At the top right, there is a 'Help for this Page' link. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup Object Manager for the 'School' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'New Custom Field' and is on 'Step 4. Add to page layouts'. It shows a field definition for 'Address' with 'Text Area' as the data type and 'Address\_1' as the field name. Below it, a note says to select page layouts for the field. Two checkboxes are checked: 'Add Field' and 'School Layout'. A message at the bottom right says '8 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

The screenshot shows the 'School Custom Field Address' page. The left sidebar has the same setup categories. The main area displays the 'Custom Field Definition Detail' for 'Address'. It shows the field label 'Address', field name 'Address', API name 'Address\_\_c', data type 'Text Area', and object name 'School'. Under 'General Options', there is a 'Required' checkbox which is unchecked. A message at the bottom right says '10 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter District.
3. Click Next, Next, then Save & New

mvvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003ELVq/FieldsAndRelationships/new

The screenshot shows the 'Object Manager' interface for the 'School' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main pane displays a list of field types under the 'Email' category. The 'Text Area' type is selected, indicated by a blue circle. Other options shown include Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. Each field type has a brief description below it.

mvvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003ELVq/FieldsAndRelationships/new

This screenshot shows the second step of a four-step wizard for creating a new custom field. The title is 'New Custom Field'. The step number 'Step 2 of 4' is displayed at the top right. The form contains fields for 'Field Label' (set to 'District'), 'Field Name' (set to 'District'), 'Description' (empty), and 'Help Text' (empty). Under the 'Required' section, there are two checkboxes: one for 'Always require a value in this field in order to save a record' (unchecked) and another for 'Add this field to existing custom report types that contain this entity' (checked). At the bottom, there is a 'Default Value' field containing the text 'Show Formula Editor'. A yellow tooltip in the bottom right corner says '10 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "School New Custom Field". The left sidebar under "Fields & Relationships" includes options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "Step 3. Establish field-level security" and "Step 3 of 4". It displays field details: Field Label "District", Data Type "Text Area", Field Name "District\_\_c", and Description. Below this, it asks to select profiles for edit access. A table lists profiles with checkboxes for "Visible" and "Read-Only". Profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Contract Manager, Cross Org Data Proxy User, and Custom: Marketing Profile. A tooltip at the bottom right says "10 of 24 - Clipboard Item not Collected: Delete items to increase available space".

The screenshot shows the final step of creating the custom field. The page title is "School Custom Field District". The left sidebar is identical to the previous screen. The main content area shows the "Custom Field Definition Detail" for the "District" field. It includes sections for "Field Information" (Field Label "District", Field Name "District", API Name "District\_\_c", Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By P VINO THINI, 18/03/2023, 1:26 pm), "Validation Rules [0]", and "General Options" (Required checkbox, Default Value). The status bar at the bottom indicates "Modified By P VINO THINI, 18/03/2023, 1:26 pm".

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter State.
3. Click Next, Next, then Save & New.

mvmutthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003ELVq/FieldsAndRelationships/new

The screenshot shows the 'Fields & Relationships' section of the Object Manager for the 'School' object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a list of field types with their descriptions:

- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area**
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) i
- Time
- URL

Each field type has a detailed description below it.

mvmutthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003ELVq/FieldsAndRelationships/new

The screenshot shows the 'Step 2. Enter the details' screen for creating a new custom field named 'State'. The field label and name are both set to 'State'. The 'Required' checkbox is unchecked, while the 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity' checkboxes are checked. The 'Default Value' field contains the text 'Show Formula Editor'.

Screenshot of the Salesforce Setup interface showing the creation of a new custom field for the 'School' object.

**Page Layouts**

**Step 4. Add to page layouts**

**Field Label:** State  
**Data Type:** Text Area  
**Field Name:** State\_\_1  
**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.  
 Add Field **Page Layout Name:**  
 School Layout  

When finished, click Save & New to create more custom fields, or click Save if you are done.

**Help for this Page**

**Previous** **Save & New** **Save** **Cancel**

**11 of 24 - Clipboard**  
 Item not Collected: Delete items to increase available space

Screenshot of the Salesforce Setup interface showing the detailed configuration of the 'State' custom field for the 'School' object.

**Field Information**

Field Label:	State	Object Name:	School
Field Name:	State	Data Type:	Text Area
API Name:	State__c		
Description:			
Help Text:			
Data Owner:			
Field Usage:			
Data Sensitivity Level:			
Compliance Categorization:			

Created By: P.VINOTHINI 18/03/2023, 1:29 pm      Modified By: P.VINOTHINI 18/03/2023, 1:29 pm

**General Options**

Required:	<input type="checkbox"/>
Default Value:	

**Help for this Page**

**Validation Rules [0]**

**Previous** **Edit** **Set Field-Level Security** **View Field Accessibility** **Where is this used?**

**11 of 24 - Clipboard**  
 Item not Collected: Delete items to increase available space

Let see this

1. Select the Phone as the Data Type, then click Next.
2. For field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a list of field types with their descriptions:

- Email
- Geolocation
- Number
- Percent
- Phone**
- Picklist
- Multi-Select
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

Each field type has a detailed description below it, such as 'Allows users to enter any phone number. Automatically formats it as a phone number.' or 'Allows users to enter up to 131,072 characters on separate lines.'

The screenshot shows the 'New Custom Field' creation process. The user is on Step 2 of 4. The form fields include:

- Field Label:** Phone Number
- Field Name:** Phone\_Number
- Description:** (empty text area)
- Help Text:** (empty text area)
- Required:**  Always require a value in this field in order to save a record
- Auto add to custom report type:**  Add this field to existing custom report types that contain this entity
- Default Value:** Show Formula Editor

The screenshot shows the detail view for the 'Phone Number' custom field. The 'Field Information' section includes:

Field Label	Phone Number	Object Name	School
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number__c		
Description	(empty)		
Help Text	(empty)		
Data Owner	(empty)		
Field Usage	(empty)		
Data Sensitivity Level	(empty)		
Compliance Categorization	(empty)		

The 'General Options' section shows:

- Required:**
- Default Value:** Show Formula Editor

At the bottom right, there is a note: '11 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

## Let's create Roll-up summary fields to calculate the number of students

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Number of students
5. Click Next
6. Then select the master object summarized as students and then select count as roll-up and then click Next, Next and save.

School  
New Custom Field  
Step 1. Choose the field type  
Specify the type of information that the custom field will contain.  
Data Type  
 None Selected  
 Auto Number  
 Formula  
 Roll-Up Summary  
 Lookup Relationship  
 Master-Detail Relationship  
Select one of the data types below.  
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.  
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.  
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.  
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list.  
The other object is the source of the values in the list.  
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master").  
• The relationship field is required on all detail records.  
Help for this Page ?  
Next Cancel  
11 of 24 - Clipboard  
Item not Collected: Delete items to increase available space

School  
New Custom Field  
Step 2 of 5  
Field Label  ?  
Field Name  ?  
Description   
Help Text   
Auto add to custom report type  Add this field to existing custom report types that contain this entity ?  
Help for this Page ?  
Previous Next Cancel  
11 of 24 - Clipboard  
Item not Collected: Delete items to increase available space

[mvmutthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVq/FieldsAndRelationships/new](https://mvmutthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVq/FieldsAndRelationships/new)

The screenshot shows the 'New Custom Field' wizard, Step 3 of 5. It is titled 'School New Custom Field'. The 'Fields & Relationships' tab is selected in the sidebar. The main area is titled 'Step 3. Define the summary calculation'. It includes sections for 'Select Object to Summarize' (Master Object: School, Summarized Object: Students), 'Select Roll-Up Type' (COUNT selected), and 'Filter Criteria' (All records should be included in the calculation). A note at the bottom states: 'When finished, click Save & New to create more custom fields, or click Save if you are done.'

[mvmutthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVq/FieldsAndRelationships/new](https://mvmutthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVq/FieldsAndRelationships/new)

The screenshot shows the 'New Custom Field' wizard, Step 5 of 5. It is titled 'School New Custom Field'. The 'Fields & Relationships' tab is selected in the sidebar. The main area is titled 'Step 5. Add to page layouts'. It shows field details: Field Label: Number of Students, Data Type: Roll-Up Summary, Field Name: Number\_of\_Students\_\_2, Description: . It also lists page layouts: Add Field (checkbox checked), Page Layout Name (checkbox checked), School Layout (checkbox checked). A note at the bottom states: 'When finished, click Save & New to create more custom fields, or click Save if you are done.' A message at the bottom right says: '11 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

[mvmutthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVq/FieldsAndRelationships/00N2w00000XS5T...](https://mvmutthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVq/FieldsAndRelationships/00N2w00000XS5T...)

The screenshot shows the 'School Custom Field Number of Students' definition detail page. The 'Fields & Relationships' tab is selected in the sidebar. The main area is titled 'Custom Field Definition Detail' for the field 'Number of Students'. It includes sections for 'Field Information' (Field Label: Number of Students, Field Name: Number\_of\_Students, API Name: Number\_of\_Students\_\_c, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By: P VINO THINI, Created Date: 03/03/2023, 12:20 pm) and 'Roll-Up Summary Options' (Data Type: Roll-Up Summary, Summarized Object: Student, Filter Criteria, Summary Type: COUNT). A note at the bottom states: 'When finished, click Save & New to create more custom fields, or click Save if you are done.'

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type.
4. Enter the field label as Highest Marks
5. Click Next
6. Then select the master object summarized as students and then select Max as roll-up and then select Marks as field t aggregate. click Next, Next and save.

Screenshot of the Salesforce Object Manager interface showing the creation of a new custom field for the 'School' object. The left sidebar shows the 'Fields & Relationships' section. The main panel is titled 'New Custom Field' and is on 'Step 1. Choose the field type'. The 'Roll-Up Summary' option is selected. A tooltip for 'Roll-Up Summary' states: 'A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.' A clipboard notification in the bottom right corner says '11 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

Screenshot of the Salesforce Object Manager interface showing the continuation of the custom field creation process. The main panel is titled 'Step 2. Enter the details' and is on 'Step 2 of 5'. The 'Field Label' is set to 'Highest Marks'. Other fields like 'Field Name' and 'Description' are also visible. A checkbox 'Add this field to existing custom report types that contain this entity' is checked. A tooltip for 'Field Label' says 'The label for this field, used in reports and lists.' A clipboard notification in the bottom right corner says '11 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

School New Custom Field

Step 3. Define the summary calculation

Master Object: School  
Summarized Object: Students

Select Roll-Up Type:

- COUNT
- SUM
- MIN
- MAX (selected)

Field to Aggregate: Marks

Filter Criteria:

- All records should be included in the calculation (selected)
- Only records meeting certain criteria should be included in the calculation

School New Custom Field

Step 4. Establish field-level security

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Activity-2:

### Creation of fields for the student objects:

1. Select the Phone as the Data Type, then click Next.
2. For field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface for the 'Student' object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area displays the 'Phone Number' custom field definition. Key details shown include:

- Field Label:** Phone Number
- Field Name:** Phone\_Number
- API Name:** Phone\_Number\_\_c
- Description:** Help Text
- Data Owner:** Data Owner
- Field Usage:** Field Usage
- Data Sensitivity Level:** Data Sensitivity Level
- Compliance Categorization:** Compliance Categorization
- Created By:** P VINOTHINI | 20/03/2023, 12:06 pm
- Modified By:** P VINOTHINI | 20/03/2023, 12:06 pm
- Object Name:** Student
- Data Type:** Phone
- General Options:** Required (checkbox checked), Default Value (dropdown menu)

A yellow tooltip at the bottom right indicates "13 of 24 - Clipboard Item not Collected: Delete items to increase available space".

## Let's create a master-detail relationship with school object

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter school.
5. Click Next, Next, Next and Save.

The screenshot shows the process of creating a new custom field for the 'Student' object. The sidebar on the left is identical to the previous screenshot. The main area is titled 'New Custom Field' and is on 'Step 1: Choose the field type'. The 'Data Type' section contains the following options:

- None Selected**: Select one of the data types below.
- Auto Number**: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula**: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary**: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship**: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship**: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master").
  - The relationship field is required on all detail records.

A yellow tooltip at the bottom right indicates "13 of 24 - Clipboard Item not Collected: Delete items to increase available space".

The screenshot shows the Salesforce Object Manager interface. A sidebar on the left lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main area is titled 'Student Custom Field School'. It displays the 'Custom Field Definition Detail' for the 'School' field. The field is defined as a Master-Detail type, related to the 'School' object. The 'Field Label' is 'School', 'Field Name' is 'School', and 'API Name' is 'School\_\_c'. The 'Data Type' is 'Master-Detail'. The 'Object Name' is 'Student'. The 'Created By' and 'Modified By' fields show 'P.VINOTHINI' with the timestamp '20/03/2023, 12:07 pm'. A note at the bottom states: 'Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.' A yellow callout box in the bottom right corner says '13 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

## Let's create a Pick-list field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:  
6. Pass  
7. Fail
8. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. A sidebar on the left lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main area is titled 'Student Custom Field Class'. It displays the 'Custom Field Definition Detail' for the 'Class' field. The field is defined as a Number type, related to the 'Student' object. The 'Field Label' is 'Class', 'Field Name' is 'Class', and 'API Name' is 'Class\_\_c'. The 'Data Type' is 'Number'. The 'Object Name' is 'Student'. The 'Created By' and 'Modified By' fields show 'P.VINOTHINI' with the timestamp '20/03/2023, 12:12 pm'. A yellow callout box in the bottom right corner says '13 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

## Let's create a Number field:

1. Select the Number as the Data Type, then click Next.
2. For field Label, enter Class.
3. Click Next, Next, then save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various customization options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Student Custom Field Class'. It displays the 'Custom Field Definition Detail' for the 'Class' field. The field information includes:  
Field Label: Class  
Field Name: Class  
API Name: Class\_\_c  
Object Name: Student  
Data Type: Number  
Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By: P VINOTHINI, Modified By: P VINOTHINI, and General Options for Required, Unique, and External ID.

The screenshot shows the Salesforce Object Manager interface, similar to the previous one but for a different field. It displays the 'Custom Field Definition Detail' for the 'Marks' field. The field information includes:  
Field Label: Marks  
Field Name: Marks  
API Name: Marks\_\_c  
Object Name: Student  
Data Type: Number  
Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By: P VINOTHINI, Modified By: P VINOTHINI, and General Options for Required, Unique, and External ID.

## Activity-3:

### Creation of fields for the Parents objects:

1. Select the Text Area as the Data Type, then click Next.
2. For field Label, enter Parent Address.
3. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Student'. On the left, a sidebar under 'Fields & Relationships' lists various layout types. The central panel displays the 'Custom Field Definition Detail' for a field named 'Class'. The 'Field Information' section shows 'Field Label' as 'Class', 'Field Name' as 'Class', 'API Name' as 'Class\_\_c', 'Object Name' as 'Student', and 'Data Type' as 'Number'. The 'General Options' section has 'Required' checked. A status bar at the bottom right indicates '13 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

1. Select the Phone as the Data Type, then click Next.
2. For field Label, enter Parent Number.
3. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Parent'. On the left, a sidebar under 'Fields & Relationships' lists various layout types. The central panel displays the 'Custom Field Definition Detail' for a field named 'Parent Number'. The 'Field Information' section shows 'Field Label' as 'Parent Number', 'Field Name' as 'Parent\_Number', 'API Name' as 'Parent\_Number\_\_c', 'Object Name' as 'Parent', and 'Data Type' as 'Phone'. The 'General Options' section has 'Required' checked. A status bar at the bottom right indicates '13 of 24 - Clipboard Item not Collected: Delete items to increase available space'.

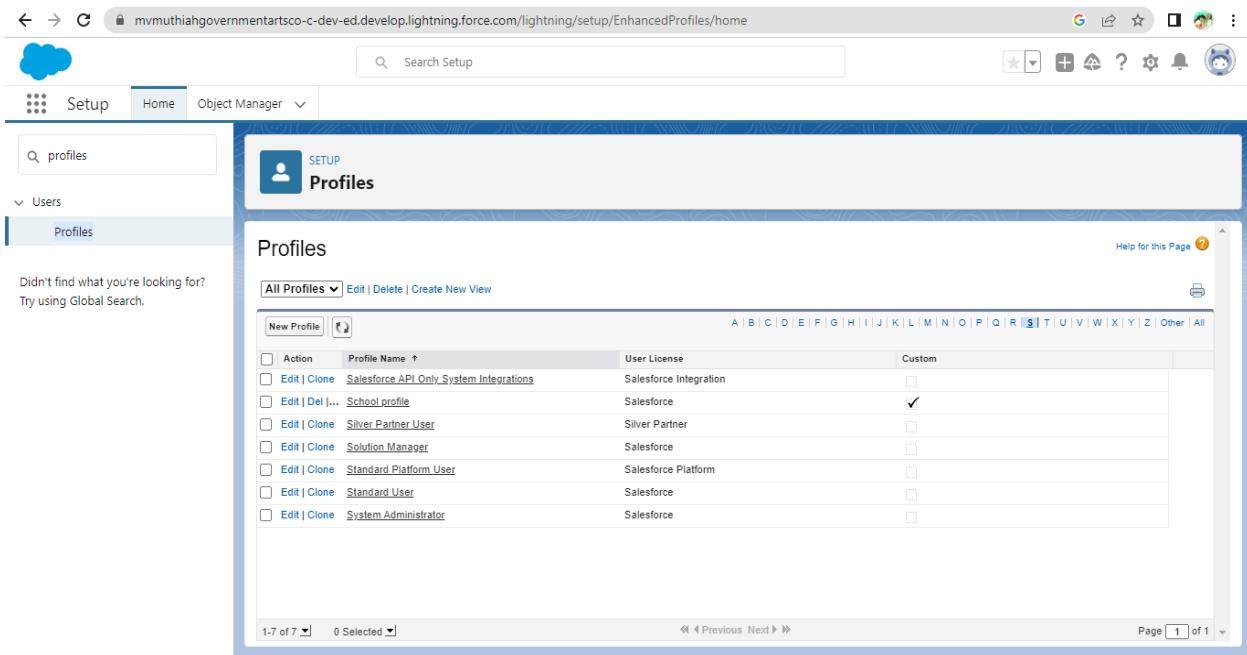
## 4. Milestone-5: Profile

### Activity:

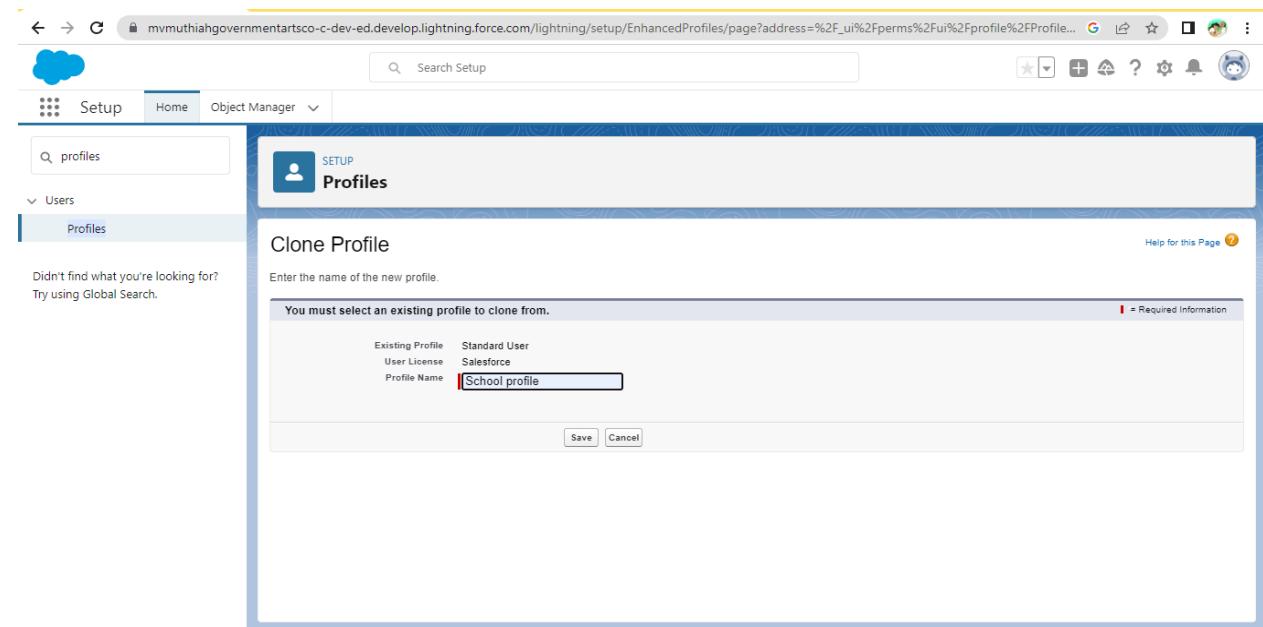
#### Creation on profile:

From Setup enter Profiles in the Quick Find box, and select profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter School profile.



The screenshot shows the Salesforce Setup interface for managing Profiles. The top navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". The main content area has a header "Profiles" with a "Help for this Page" link. Below the header is a table titled "Profiles" with columns for "Action", "Profile Name", "User License", and "Custom". The table lists several profiles: "Salesforce API Only System Integrations" (User License: Salesforce Integration, Custom: unchecked), "School profile" (User License: Salesforce, Custom: checked), "Silver Partner User" (User License: Silver Partner, Custom: unchecked), "Solution Manager" (User License: Salesforce, Custom: unchecked), "Standard Platform User" (User License: Salesforce Platform, Custom: unchecked), "Standard User" (User License: Salesforce, Custom: unchecked), and "System Administrator" (User License: Salesforce, Custom: unchecked). At the bottom of the table are navigation links for "1-7 of 7" and "0 Selected", and a "Page 1 of 1" indicator.



The screenshot shows the "Clone Profile" dialog box. The title bar says "Clone Profile" with a "Help for this Page" link. The dialog contains a message "Enter the name of the new profile." and a note "You must select an existing profile to clone from." Below this, there are fields for "Existing Profile" (set to "Standard User"), "User License" (set to "Salesforce"), and "Profile Name" (containing the value "School profile"). At the bottom of the dialog are "Save" and "Cancel" buttons.

The screenshot shows the Salesforce Setup interface with the URL [mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005d2X0](https://mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005d2X0). The page is titled 'Profiles' under the 'SETUP' tab. It shows a 'School profile' with the following details:

- Name:** School profile
- User License:** Salesforce
- Description:** (empty)
- Created By:** P.VINOTHINI 28/03/2023, 1:26 pm
- Modified By:** P.VINOTHINI 10/04/2023, 9:17 pm

**Page Layouts**

Standard Object Layouts	Global	Object Milestone
Global	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Layout [View Assignment]

4. Click Save.
5. While still on the school profile page, then click Edit.
6. Scroll down to custom Object Permissions and Give view all access permissions and assign to the parent profile.

The screenshot shows the Salesforce Setup interface with the URL [mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005d2X0](https://mvmuthiahgovernmentartsco-c-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005d2X0). The page is titled 'Profiles' under the 'SETUP' tab. It shows a 'School profile' with the following details:

- Name:** School profile
- User License:** Salesforce
- Description:** (empty)
- Created By:** P.VINOTHINI 28/03/2023, 1:26 pm
- Modified By:** P.VINOTHINI 10/04/2023, 9:17 pm

**Page Layouts**

Standard Object Layouts	Global	Object Milestone
Global	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Layout [View Assignment]

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a sidebar with various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups). The main content area is titled 'Profiles' and contains two tabs: 'Custom Object Permissions' and 'Session Settings'. Under 'Custom Object Permissions', there are sections for Parents and Schools, each with tables for Basic Access and Data Administration. Under 'Session Settings', it shows session timeout and security requirements. At the bottom, there's a note about JavaScript errors.

## Milestone-6: Users

### Activity:

#### Creating Users:

- From Setup, in the Quick Find box, enter Users, and then select Users.
- Click New User.
- Enter the User's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username as the email address.
- Select a User License As salesforce.
- Select a profile as a school profile.

The screenshot shows the Salesforce Setup interface under the Manage Users section. The left sidebar has categories like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a expanded 'Users' category. The main content area is titled 'New User' and shows a 'User Edit' form with 'General Information' fields. The 'Role' field is set to '<None Specified>'. Other fields include First Name (Vinothini), Last Name (P), Alias (vp), Email (vinopooli2003@gmail.com), Username (Parentsvp@gmail.com), Nickname (User1681174251606572658), Title, Company, Department, Division, and Profile (Standard Platform User). There are also checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (None).

6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

7. Similarly follow the above steps and create 3 users as Teachers and Principals.

## **Milestone-7: Permission sets**

### **Activity-1:**

#### **Permission set 1:**

1. From Setup, enter Permission on Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set names as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user

<https://mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OPS2w0000009fHCV/PermissionSetAssignment/home>

Setup Home Object Manager

Search Setup

... > SETUP > PERMISSION SET 'TEACHER PERMISSION 1'

## Teacher permission 1

Current Assignments

Add Assignment



No assignments defined.

Didn't find what you're looking for?  
Try using Global Search.

<https://mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OPS2w0000009fHCV/PermissionSetAssignment/new>

Setup Home Object Manager

Search Setup

... > PERMISSION SET 'TEACHER PERMISSION 1' > MANAGE ASSIGNMENT EXPIRATION

## Teacher permission 1

Select Users to Assign

Recently Viewed ▾

3 items selected

Full Name	Title	Phone	Email
Vinothini P			vinopooli2003@gmail.com
Vinothini P			vinopooli2003@gmail.com
P VINOTHINI			vinopooli2003@gmail.com

Search this list...

Didn't find what you're looking for?  
Try using Global Search.

Type here to search

1 Day 1 Week 30 Days 60 Days Custom Date Select a time zone...

<https://mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OPS2w0000009fHCV/PermissionSetAssignment/new>

Setup Home Object Manager

Search Setup

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
P VINOTHINI		System Administrator	✓	Salesforce	Never Expires
Vinothini P		School profile	✓	Salesforce	Never Expires
Vinothini P		Standard Platform User	✓	Salesforce Platform	Never Expires

Cancel Back Assign

Didn't find what you're looking for?  
Try using Global Search.

The screenshot shows the Assignment Summary page in the Salesforce Setup. The sidebar on the left has 'Users' selected under 'Permission Sets'. The main area displays a table titled 'Assignment Summary' with columns: Full Name, User License, Expires On, Time Zone, and Status. Three users are listed: P VINOTHINI, Vinothini P, and Vinothini P. All three have 'Success' status.

Full Name	User License	Expires On	Time Zone	Status
P VINOTHINI	Salesforce			<input checked="" type="checkbox"/> Success
Vinothini P	Salesforce			<input checked="" type="checkbox"/> Success
Vinothini P	Salesforce Platform			<input checked="" type="checkbox"/> Success

The screenshot shows the Selected Users page in the Salesforce Setup. The sidebar on the left has 'Users' selected under 'Permission Sets'. The main area displays a table titled 'Selected Users' with columns: Full Name, Role, Profile, Active, User License, and Expires On. Three users are listed: P VINOTHINI, Vinothini P, and Vinothini P. All three have 'Never Expires' as their expiration date.

Full Name	Role	Profile	Active	User License	Expires On
P VINOTHINI	System Administrator		<input checked="" type="checkbox"/>	Salesforce	Never Expires
Vinothini P	School profile		<input checked="" type="checkbox"/>	Salesforce	Never Expires
Vinothini P	Standard Platform User		<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Similarly follow the above steps for the permission set 2.

### Activity-2:

#### Permission sets 2:

- From Setup, enter Permission on Sets in the Quick Find box, then select Permission Sets.
- Click New.
- Give the name of the Permission set names as principal permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the principal user.

## **Milestone-8: Reports**

### **Activity:**

#### **Reports:**

1. From the Reports tab, click New Report.
2. Select the report type as School with students and parents for the report, and click Create.
3. Customize your report, then save or run it.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there are links for 'Setup', 'Home', and 'Object Manager'. Below the navigation bar is the 'App Launcher' which includes sections for 'Users' (with sub-links like Pe, Pe, Pr, Pu, Qu, Ro, Us), 'Features' (with sub-links like Da), and 'All Items'. Under 'All Items', there are categories for Accounts, Contacts, List Emails, Refunds, Alert Settings, Contract Line Items, Location Groups, Reports, Alternative Payment Methods, Contracts, Locations, and Return Orders. At the bottom of the launcher, there is a search bar for 'Search apps or items...', a 'Visit AppExchange' button, and a note: 'Didn't find what you're looking for? Try using Global Search.' On the right side of the screen, there is a user management section showing a table with columns for 'Edit', 'User Security', 'sec', 'User Name', 'Last Name', 'Email', 'Role', and 'Status'. Buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' are at the bottom of this table. A sidebar on the right shows 'Analytics Cloud Security User' and 'System Administrator' checked.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for 'School Management', 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The 'Reports' tab is currently selected. The main content area displays a table titled 'Recent' under the 'REPORTS' category. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. One item is listed: 'New Schools with Students Report' (Report Name), 'Private Reports' (Description), 'P VINO THINI' (Created By), '29/3/2023, 2:14 pm' (Created On). To the left of the table, there are navigation links for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. At the bottom of the page, the URL 'https://mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/lightn...' is visible.

The screenshot shows the 'Create Report' interface in a Salesforce Lightning application. On the left, a sidebar lists report categories: Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, File and Content Reports, Individuals, Other Reports (which is selected), and Hidden Report Types. The main area is titled 'Select a Report Type' and contains a search bar and a table. The table has two columns: 'Report Type Name' and 'Category'. It lists four items: Schools (Standard), Schools with Students (Standard), Parents (Standard), and Screen Flows (Custom). A tooltip 'Save Yourself Some Clicks' is visible over the table. The top navigation bar includes links for School Management, Schools, Students, Parents, Reports (selected), and Dashboards.

This screenshot shows the same 'Create Report' interface, but the 'Schools with Students' report type is now selected. The right side of the screen displays a detailed view for this report. It includes a thumbnail icon, the report name 'Schools with Students', its category 'Standard Report Type', a 'Start Report' button, and a 'Details' section. The 'Details' section is expanded and shows the report's fields (30), last used date (4/6/2023), and a 'Created By You' section with a link to 'New Schools with Students Report'. Below that is a 'Created By Others' section stating 'No Reports Yet'. The URL at the bottom of the page is <https://mvmuthiahgovernmentartsco-c-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app#>.

## 4.Trailhead Profile Public URL

Team Member 1:

Team Member 2:

Team Member 3:

Team Member 4:

## **5. Advantages & Disadvantages**

### **Advantages:**

- ❖ Reduction In the Cost of Expenses.
- ❖ Improving The Quality of Service/Product.
- ❖ Improving The Organization Management.
- ❖ Increased Customer Loyalty.
- ❖ Track And Increase the Number of Potential Clients.
- ❖ History of Work with Each Student.
- ❖ Relevant And Visual MIS Analytics Reports.
- ❖ Easy Integrating with Third Party Services.
- ❖ Planning and Multitasking.
- ❖ Easy Implementation.
- ❖ Increase In Repeat Courses Sales.
- ❖ Elimination of errors in processes.

### **Disadvantages:**

- ❖ CRM may result in duplication of tasks
- ❖ Scalability may be limited or costly
- ❖ Educating the users about the proper CRM usage and getting them to actually use it, might be challenge
- ❖ If the CRM solution is not customized to the business objectives of a particular company, the implementation might fail

## **6. Applications**

### **CRM**

1. Enquiry Forms
2. Social Media Campaigns (ROI Tracking)
3. Marketing Automation
4. Online/Offline Applications
5. Application Fee Collection

### **ADMISSION PROCEDURE**

1. Screening
2. Eligibility Criteria
3. Online Examination
4. Rank List Generation (Index Mark Calculation)
5. Interview/GD
6. Counselling (Online/Offline)
7. Offer Letter Generation

## **FEE COLLECTION**

1. Online/Offline Fee Payment
2. Installments
3. Wallet
4. Complete Fee Management System
5. Enrollment.

## **7.CONCLUSION**

For institutions looking for CRM software that offers tools to manage every part of the student life cycle, from enquiry to alumni, the following systems may be a good fit:

1. Campus Management (Campus Nexus CRM)
2. Ellucian (Recruiter)
3. Hobsons (Radius)
4. Jenzabar (SEM CRM)
5. Maximizer CRM (Student Relate)
6. Pro-retention (Enrollment CRM)

## **8.FUTURE SCOPE**

### **The future of Student Record Systems**

“The line between the student record system and a university’s CRM system is changing. A university’s student record system isn’t necessarily the heart of the university anymore, and it’s only a matter of time before the line shifts further.”

