

## PROJECT REPORT TEMPLATE TEAM ID –NM2023TMID21892

### 1. INTRODUCTION

#### 1.1 PROJECT OVERVIEW:

This project aim is to maintain and manage the school problems which further can be modified based on the requirements.

We Created

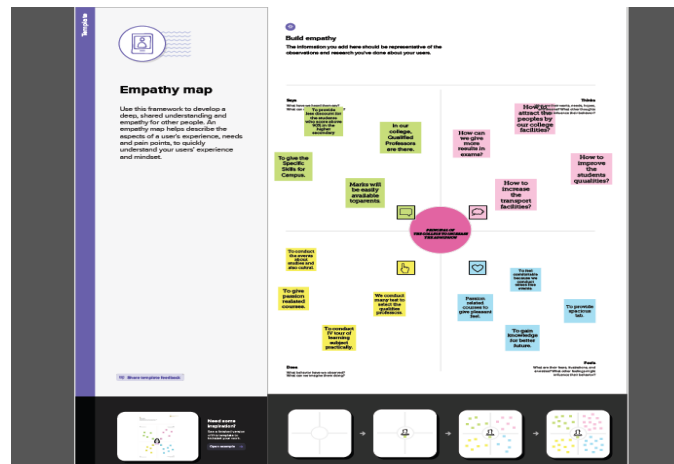
- School Management App
- Objects and fields for App

#### 1.2 PURPOSE

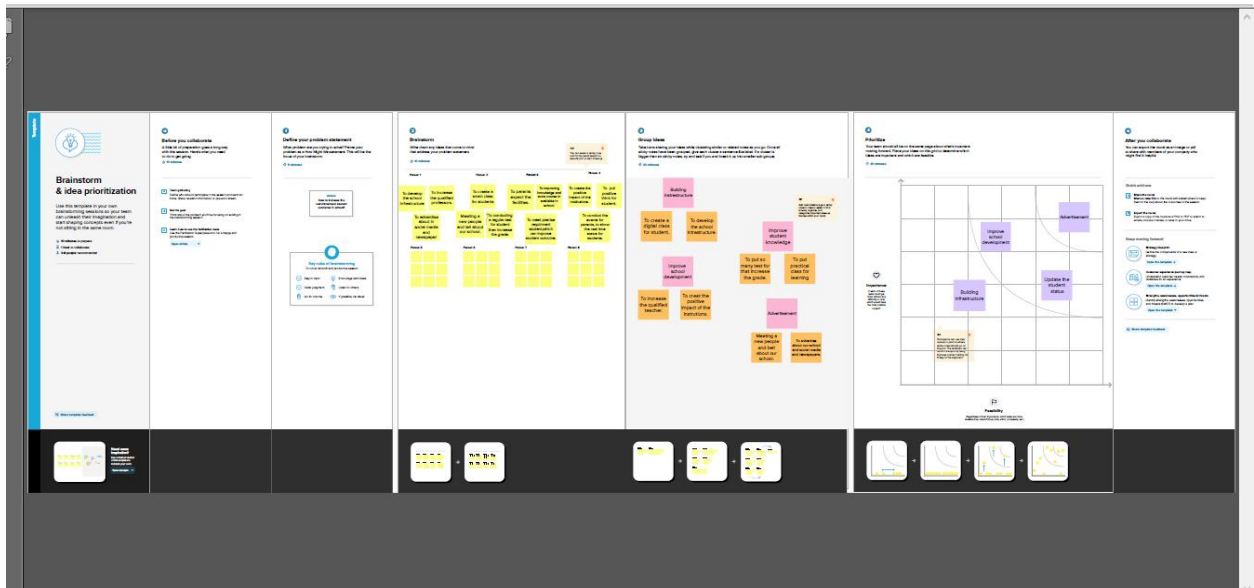
- This is customer relationship management, to help you tracking all of your constituent Relationship management, from prospects and students.
- The status of the students is easily available for students.

### 2. PROJECT DEFINITION AND DESIGN THINKING

#### 2.1 EMPATHY MAP



## 2.2 IDEATION AND BRAINSTORMING MAP



## 3. RESULTS

### 3.1 DATA MODEL

OBJECT NAME	FIELD IN THE OBJECT		
	FIELD LABEL	DATA TYPE	
SCHOOL	Address	Text Area	
	District	Text Area	
	Highest Marks	Roll-up Summary (MAX Student)	
	Number of Student	Roll-up Summary (Count Student)	
	Phone Number	Phone	
	School Websites	Text Area	
	State	Text Area	

<b>STUDENT</b>	<b>FIELD LABEL</b>	<b>DATA TYPE</b>
	Class	Number
	Marks	Number
	Phone Number	Phone
	Results	Pick List
<b>PARENT</b>	<b>FIELD LABEL</b>	<b>DATA TYPE</b>
	Parent Address	Text Area
	Parent Number	Phone

### 3.2 ACTIVITY AND SCREENSHOT

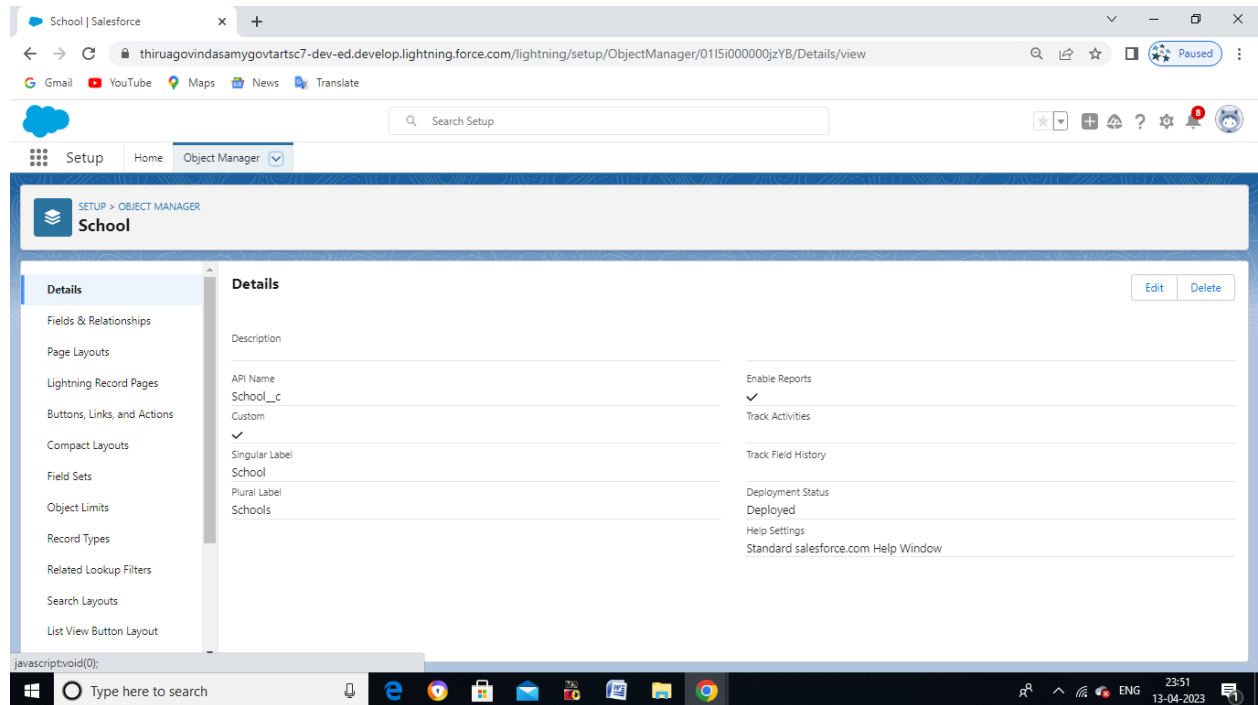
#### Milestone-1

#### Activity 1: (Creating Developer Account)

A developer org is created in salesforce . Signup form is filled and a new user and password is created. Account is activated by the email received and the account gets verified and a developer account gets created.

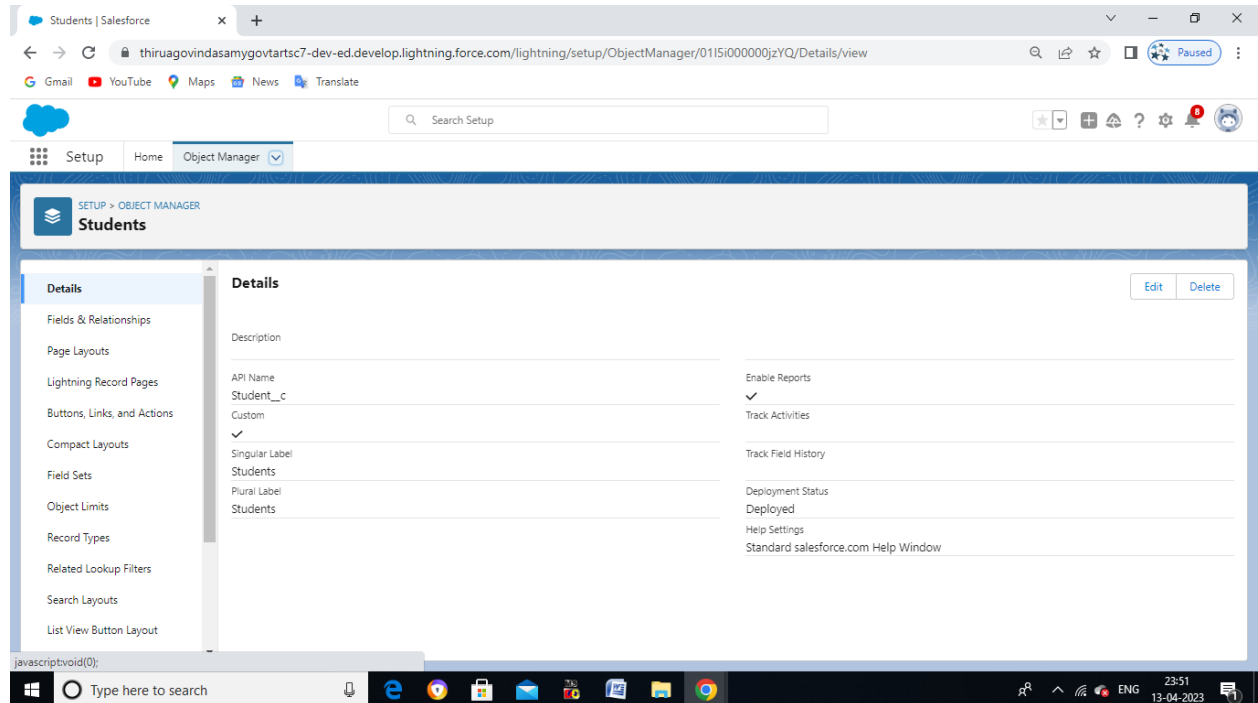
#### Milestone-2

## Activity 1:(Creating School Object)



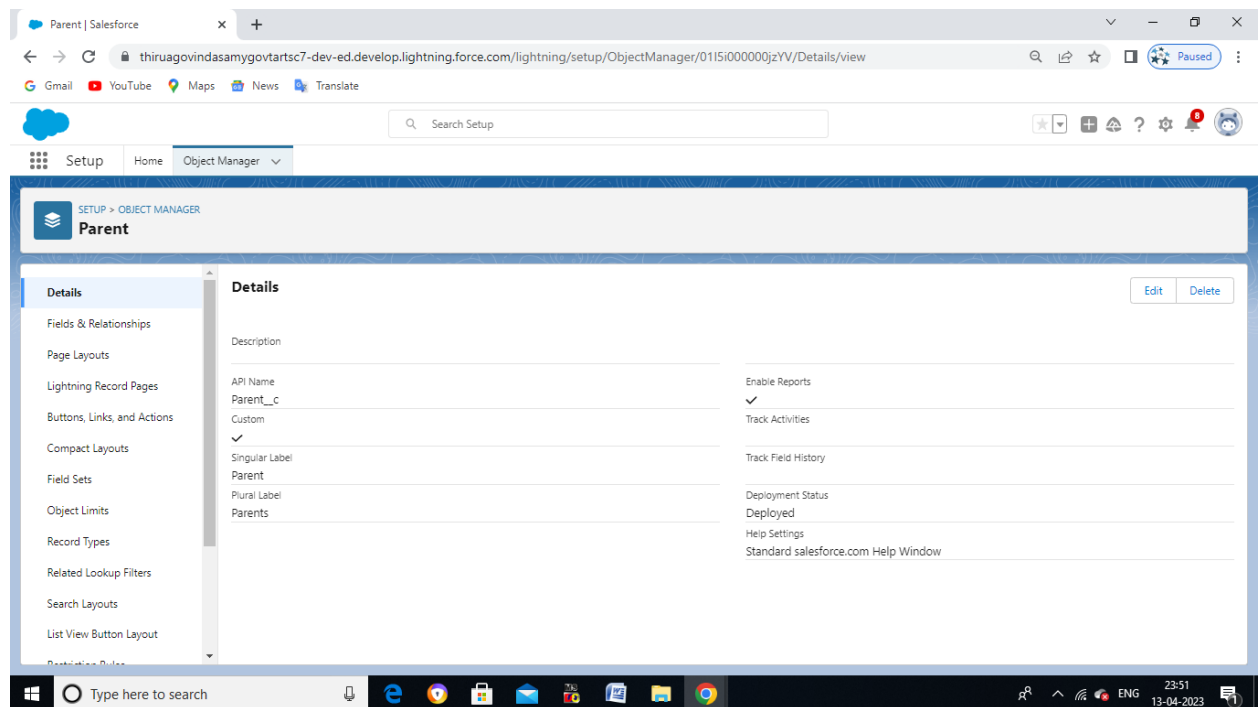
The screenshot shows the Salesforce Setup interface for the 'School' object. The browser address bar displays the URL: `thiruagovindasamygovtarts7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000jzYB/Details/view`. The page title is 'School' under 'SETUP > OBJECT MANAGER'. The left sidebar lists various configuration options: 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, and List View Button Layout. The main content area shows the 'Details' for the 'School' object, including fields like API Name (School\_c), Custom (checked), Singular Label (School), Plural Label (Schools), and various system settings like Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The Windows taskbar at the bottom shows the search bar and several application icons.

## Activity 2:(Creating Student Object)



The screenshot shows the Salesforce Setup interface for the 'Student' object. The browser address bar displays the URL: `thiruagovindasamygovtarts7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000jzYQ/Details/view`. The page title is 'Students' under 'SETUP > OBJECT MANAGER'. The left sidebar lists various configuration options: 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, and List View Button Layout. The main content area shows the 'Details' for the 'Student' object, including fields like API Name (Student\_c), Custom (checked), Singular Label (Students), Plural Label (Students), and various system settings like Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The Windows taskbar at the bottom shows the search bar and several application icons.

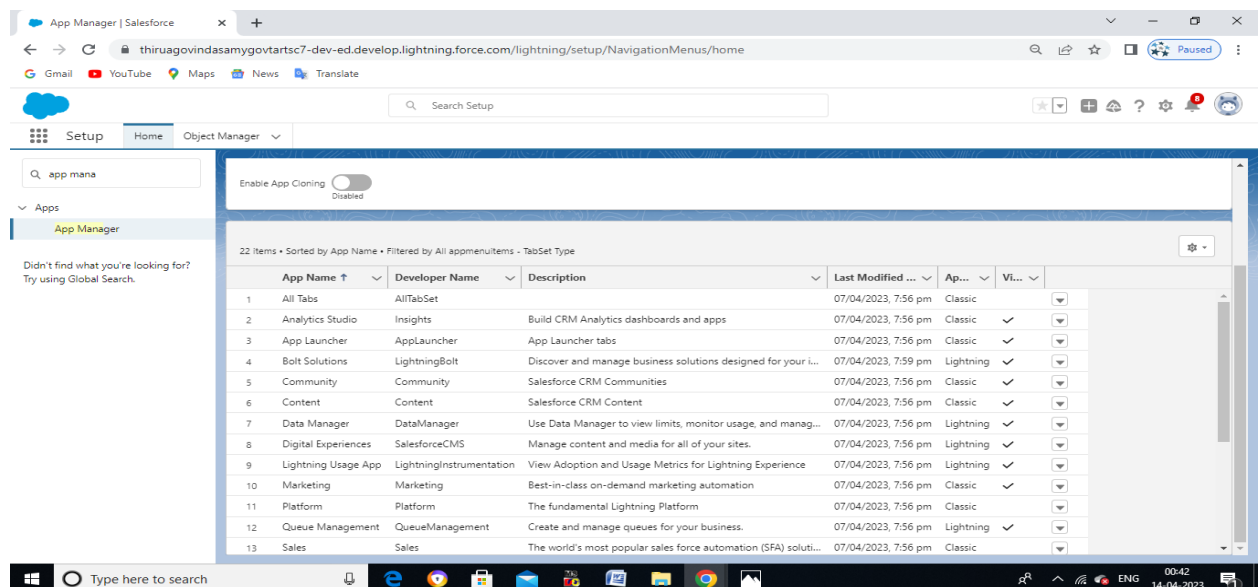
## Activity 3:(creating Parent Object)



### Milestone-3

#### Activity : (Creating for Lighting App)

- ❖ A new lightning app named as SCHOOL MANAGEMENT APP is created. This can be Viewed in app launcher.



## Milestone-4

### Activity 1:(Creating for Field and Relationship)

#### SCHOOL OBJECT:

- ❖ School field are using Text Area ,Phone,Roll-up summary data type's are created

The screenshot shows the Salesforce Object Manager interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District_c	Text Area(255)		
Highest Marks	Highest_Marks_c	Roll-Up Summary (MAX Students)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students_c	Roll-Up Summary (COUNT Students)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number_c	Phone		
School Name	Name	Text(80)		✓

#### Activity 2:

#### STUDENT OBJECT:

- ❖ Student field using in Phone,Master-detail,Pick-List,Number and Marks data type's are created.

The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Number(16, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks_c	Number(16, 0)		
Phone Number	Phone_Number_c	Phone		
Results	Results_c	Picklist		
School	School_c	Master-Detail(School)		
Student Name	Name	Text(80)		

#### Activity 3:

## PARENT OBJECT:

- ❖ Parent field using Text Area ,Phone data type are created.

The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The 'Fields & Relationships' tab is selected, displaying a list of 6 items sorted by Field Label. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address_c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number_c	Phone		

## Milestone- 5

### Activity: (Creation of Profiles)

- ❖ We created in the School Profile.

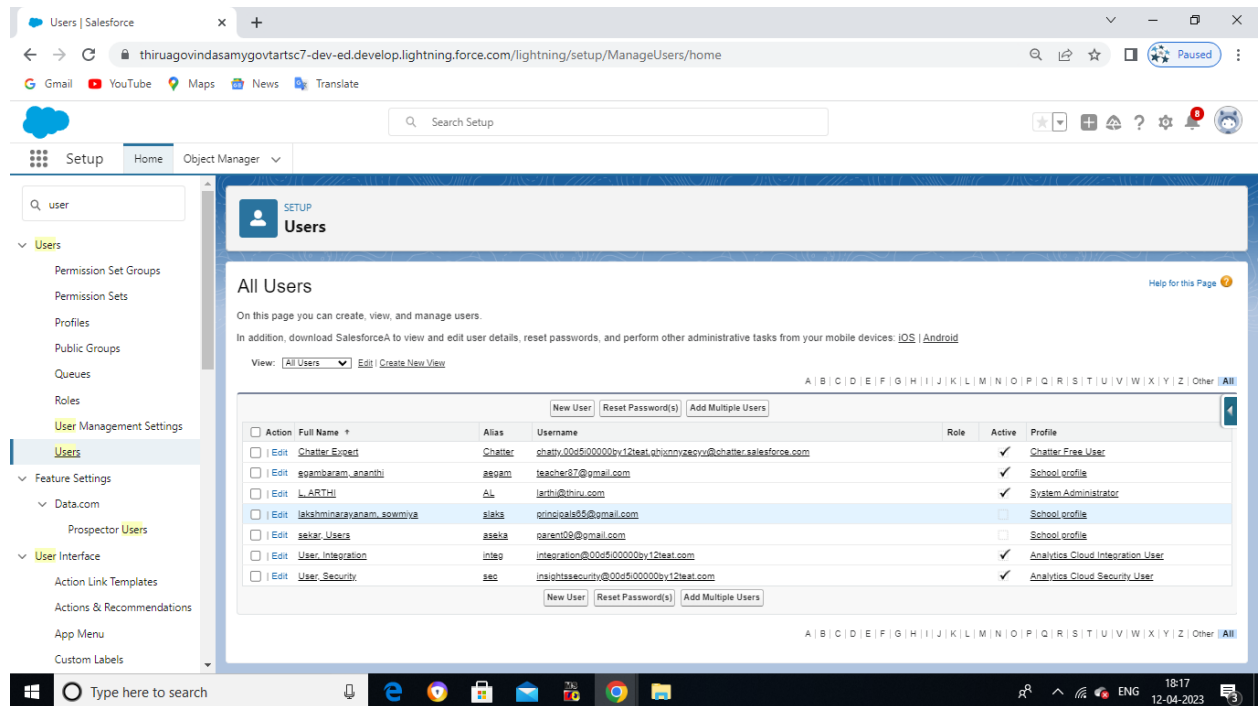
The screenshot shows the Salesforce Profiles setup page. The 'Profiles' tab is selected, displaying a list of profiles. The profiles are:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	School Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>

## Milestone-6

## Activity: (Creating the Users)

- ❖ Using the user tab a new profile , salesforce user is created.



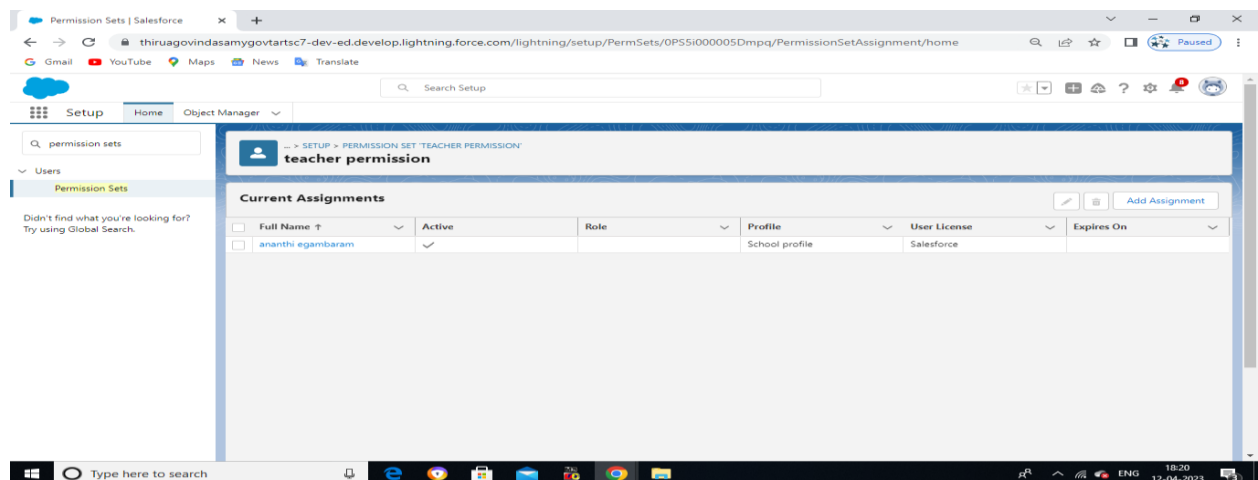
The screenshot shows the Salesforce 'Users' page in the Setup menu. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Below these is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'egambaram\_ananthi', 'LARTHI', 'lakshminarayana\_sowmya', 'sekar Users', 'User Integration', and 'User Security'. The 'User Security' user is highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d500000v12test@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	egambaram_ananthi	egam	teacher87@gmail.com		✓	School profile
<input type="checkbox"/> Edit	LARTHI	Ar	lathi@thiru.com		✓	System Administrator
<input type="checkbox"/> Edit	lakshminarayana_sowmya	slaka	principals5@gmail.com		✓	School profile
<input type="checkbox"/> Edit	sekar Users	aseka	naren09@gmail.com		✓	School profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00d500000v12test.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d500000v12test.com		✓	Analytics Cloud Security User

## Milestone-7

### Activity 1:(Permission sets 1)

- ❖ Using the permission tab a new Teacher permission sets is created.



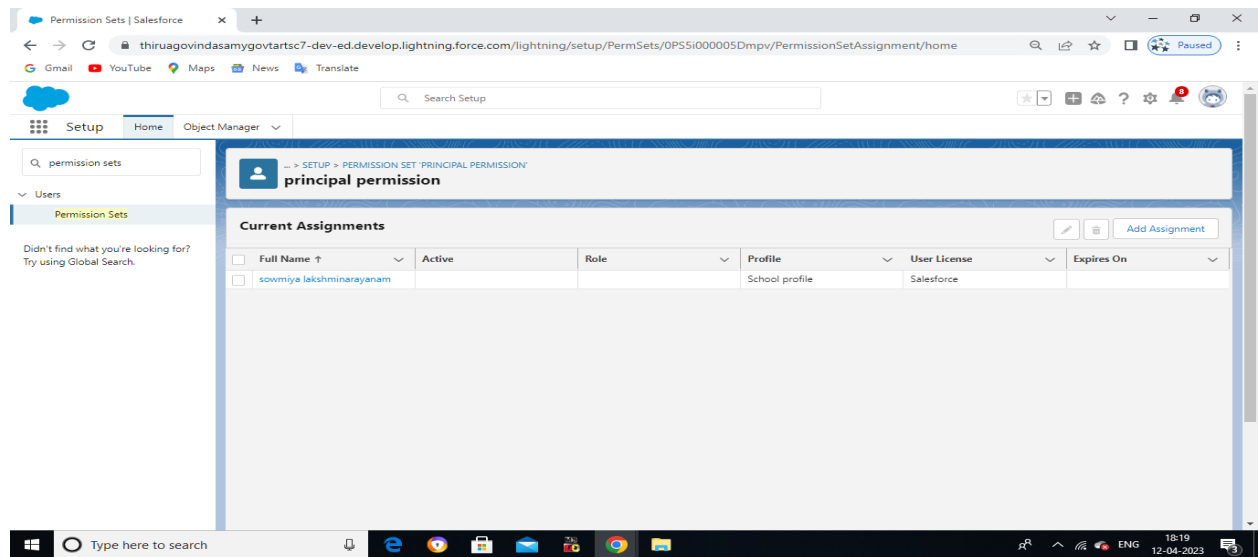
The screenshot shows the Salesforce 'Permission Sets' page in the Setup menu. The left sidebar contains navigation links for Users, Permission Sets, and User Interface. The main content area is titled 'teacher permission' and includes a search bar, a 'View' dropdown set to 'All Permission Sets', and buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Below these is a table of permission sets with columns for Full Name, Active, Role, Profile, User License, and Expires On. The table lists one permission set, 'ananthi egambaram', which is active and assigned to the 'School profile'.

Full Name	Active	Role	Profile	User License	Expires On
ananthi egambaram	✓		School profile	Salesforce	

### Activity 2:(Permission sets 2)

- ❖ Another permission sets is created the Principal Permission sets.

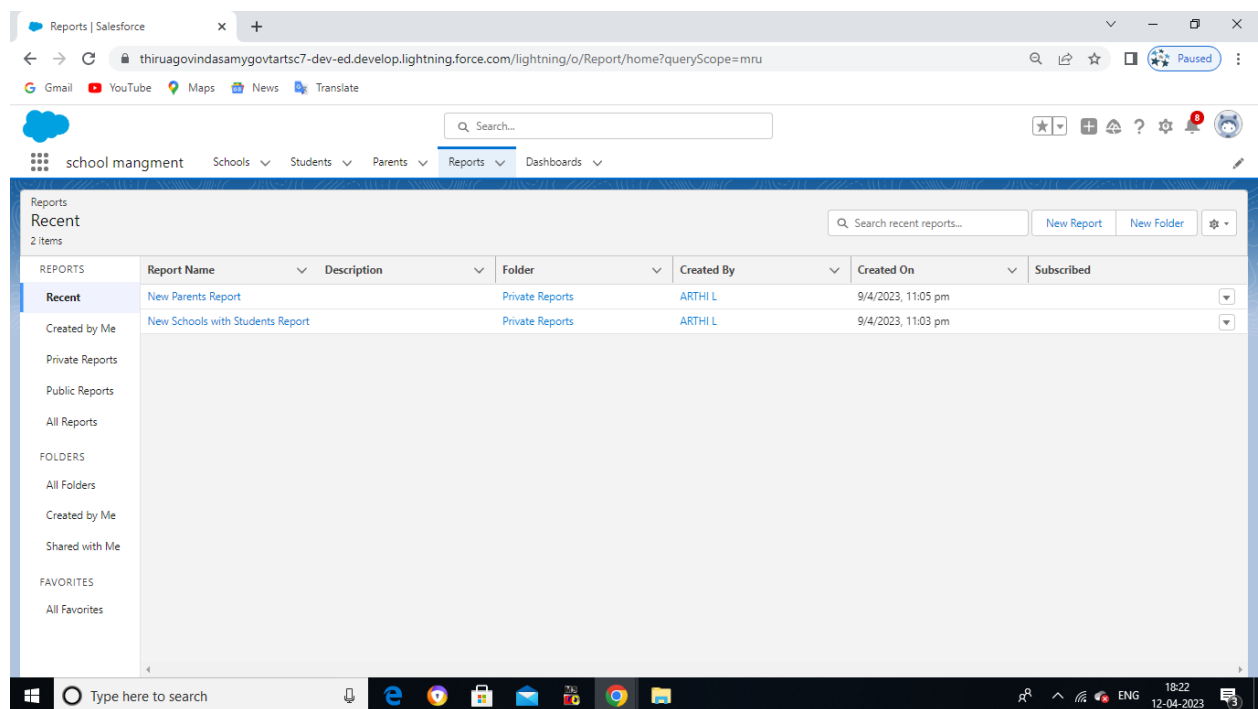




## Milestone-8

### Activity : (Creating a Report)

- ❖ In the reports tab a new report named School with Student and Parent reports are Created.



## 4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead (Akash ) - <https://trailblazer.me/id/aakash360>

Team member 1 (ANBARASAN R) -<https://trailblazer.me/id/anbur7>

Team member 2 (GIRI S)- <https://trailblazer.me/id/giris281>

Team member (GOKUL P)- <https://trailblazer.me/id/pgokul6>

#### **5. ADVANTAGES AND DISADVANTAGES:**

- Having huge amounts of data on customer interaction enables an Organization to build up a clearer picture of its customers
- All gathered data is stored and maintained as one centralized location In CRM, which can be easily accessible to see the information
- Not suitable for every business
- They are many security issues with CRM such as data costs and data being hacked by someone.

#### **6. APPLICATIONS OF CRM:**

- This project helps you to maintain and manage the school related problem.
- This project aim is to provide real-time knowledge for all the student who have basic knowledge of salesforce.

#### **7. FUTURE SCOPE:**

- CRM Software helps to generate a progress report on the ongoing tasks in your enterprises.
- In future CRM Software is used to track all the customers data and records.

#### **8. CONCLUSION:**

- To created new object and fields.
- It was observed that the presence of effective the level of student report patronage intention.

