



# A CRM APPLICATIONS FOR SCHOOLS/COLLEGES

## Introduction

### 1.1 Overview

**a summary of your strongest and most relevant skills and abilities that will be expanded in your resume or selection criteria.** It introduces you to potential employers and highlights your suitability for the position you are applying for.

**College application** is the process by which individuals apply to gain entry into a [college](#) or [university](#). Although specific details vary by country and institution, applications generally require basic background information of the applicant, such as family background, and academic or qualifying exam details such as [grade point average](#) in [secondary school](#) and [standardized testing](#) scores.

### 1.2 Purpose

The purpose of customer relationship management (CRM) cannot be dwindled down to just one answer, because there are several reasons why a business would want to implement a CRM system. That said, perhaps the most obvious purpose of customer relationship management is to help a business keep customers. Along with that, it helps the business understand what it needs to do to get more customers. Another main purpose of customer relationship management is to reduce costs by managing costly complaints and finding out what services are useless for customers. This also can help a company figure out if its product is working and, ultimately, increases profit.

# **Problem Definition & Design Thinking**

## 2.1 Empathy Map



## Retrospective

Use this framework to reflect on recent work. This simple structure is useful both alone and in groups.

Created in partnership with  
 Product School



### Reflect on the topic

Working silently and individually, have each person create a few sticky notes in all four quadrants below for about five minutes. With the remaining time, discuss notes in each quadrant.

#### What went well?

What should we keep doing?  
 What should we celebrate?  
 Where did we make progress?

Feared of skills required in Workspace

Students should be allowed to freely explore

CRM application for school and college

Many Students are unaware of what skills an industry in looking for

#### What went poorly?

Where did we have problems?  
 What were frustrating to us or others?  
 What held us back?

Chances of learning in office is less

Learn by doing a complete project

Parents are best teachers



Students often fail to relate theory to real-time implementations

Long lessons are boring. Short lessons keep the students engaged more



Visually inspire and teach/ Show and tell

Can manage to get a job even if he falls short of required skills

Restricted Syllabus

Learn other language

Reading books

#### What ideas do you have?

What ideas do you have for the future work together?  
 Where do you see opportunities to improve?  
 What has untapped potential?

#### How should we take action?

What do you believe we should do next?  
 What specific steps should we change?  
 What should extend beyond this meeting?

[Share template feedback](#)

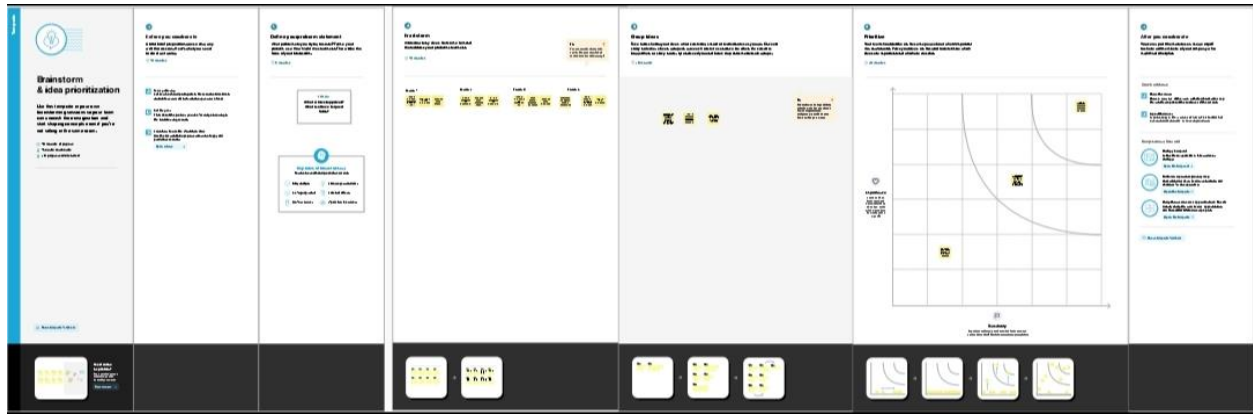


#### Need some inspiration?

See a finished version of this template to kickstart your next.

[Open example](#)

## 2.2 Ideation & Brainstorming Map



## Result

### 3.1 Data Model:

| Object Name | Fields in the object | Data Type       |
|-------------|----------------------|-----------------|
| School      | Address              | Text Area       |
|             | Phone number         | Phone           |
|             | Number of Students   | Roll-up summary |
|             | Highest Marks        | Roll-up summary |

| Objects | Field in the object | Data type                  |
|---------|---------------------|----------------------------|
| Student | Phone number        | Phone                      |
|         | School              | Master-Detail relationship |
|         | Results             | Picklist                   |
|         | Class               | Number                     |

| Object | Field in the Object | Data type |
|--------|---------------------|-----------|
| Parent | Parent Address      | Text Area |
|        | Parent Number       | Phone     |

### 3.1 Activity & Screenshot

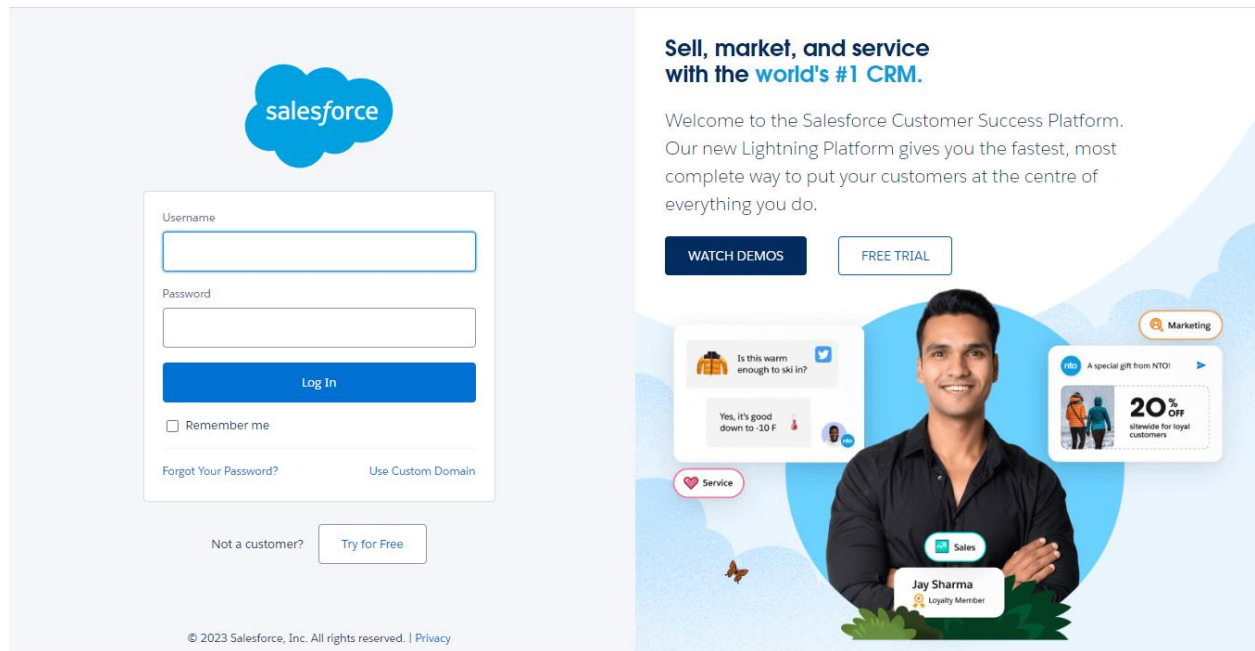
#### *Activity. 1*

##### **Creating Developer Account Creating a developer org in salesforce.**

1. Go to [developers.salesforce.com/](https://developers.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :
  - a. First name & Last name
  - a. Email
  - b. Role : Developer
  - c. Company : College Name
  - d. County : India
  - 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)

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

1. Go to [salesforce.com](https://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.



## 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 creating those objects.

1. Click on the gear icon and then select Setup.

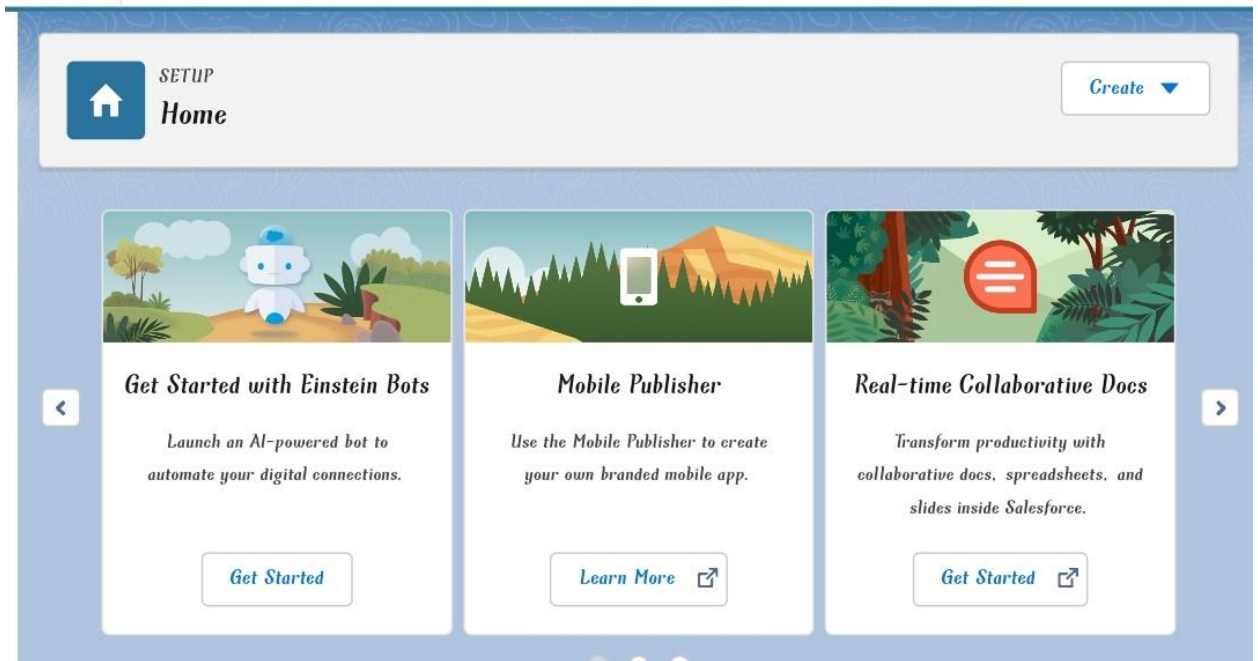
**Most Recently Used**

10 items

| NAME                                 | TYPE           | OBJECT |
|--------------------------------------|----------------|--------|
| <a href="#">Teacher Permission</a>   | Permission Set |        |
| <a href="#">Principal permission</a> | Permission Set |        |
| <a href="#">Parent Profile</a>       | Profile        |        |
| <a href="#">Content</a>              | Custom App     |        |
| <a href="#">Work</a>                 | Custom App     |        |
| <a href="#">ServiceCloudConsole</a>  | Custom App     |        |
| <a href="#">Marketing</a>            | Custom App     |        |
| <a href="#">supportforce</a>         | Custom App     |        |
| <a href="#">AllTabSet</a>            | Custom App     |        |
| <a href="#">salesforce</a>           | Custom App     |        |

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.





Search Setup

Setup

Home

Object Manager

SETUP

New Custom Object

## New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this.](#)

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Example: Account

Plural Label

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Example: 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". Record Name field is always called "Name" when referenced via the API.

Record Name

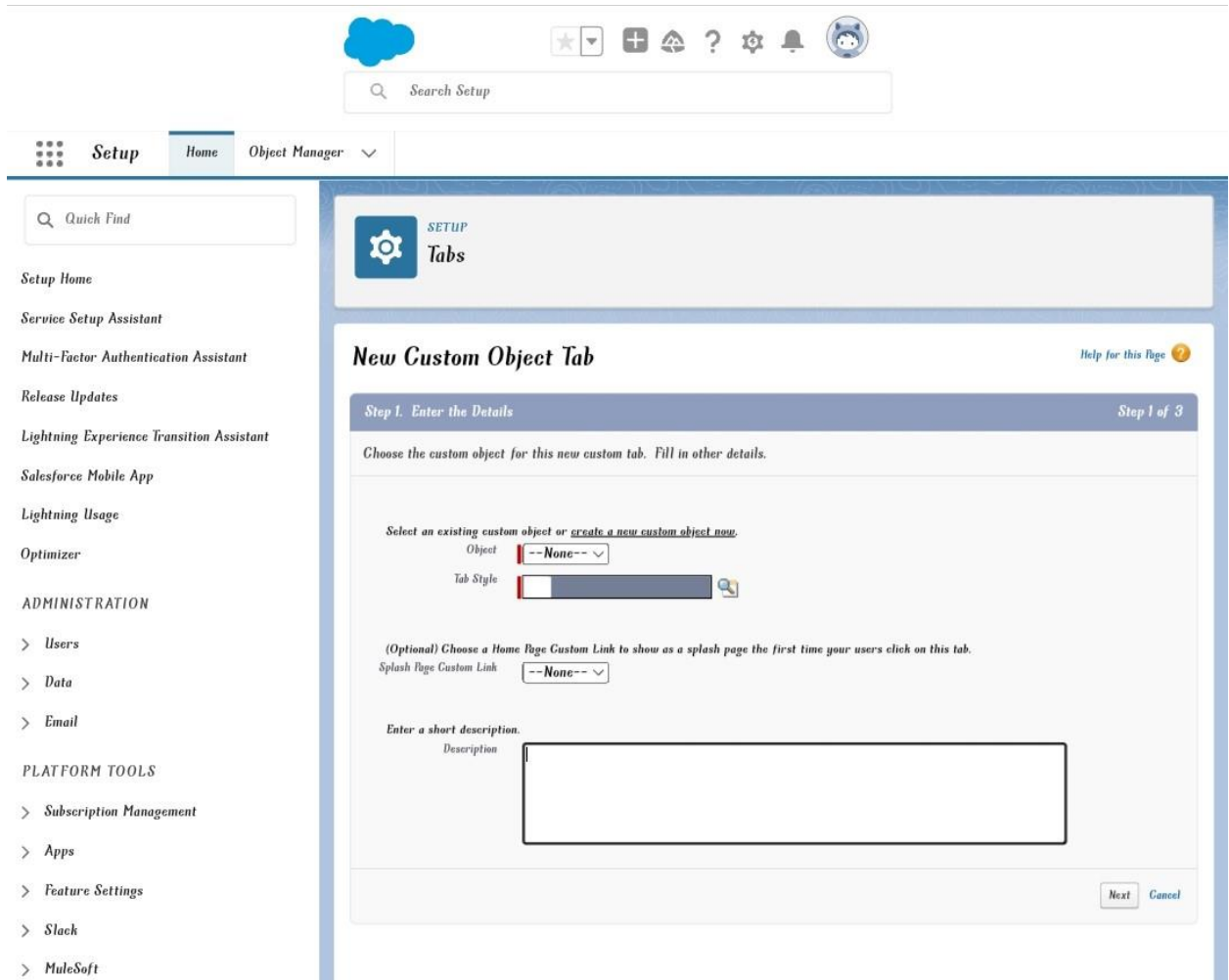
Example: Account Name

Data Type

Text

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object 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.



## Activity 2: Create student 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: Students
  - 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 Object Tabs, click New.

1. For Object, select Students.

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

### Activity 3: Create 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 Name: 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 Object Tabs, click New.

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

### Activity: Create the School Management app

- From Setup, enter App Manager in the Quick Find and select App Manager.

[New Lightning App](#)
[New Connected App](#)

### Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

31 items • Sorted by App Name • Filtered by All appmenitems - TabSet Type

| App N. | ↑ ↓            | Deve. ↓   | Desc. ↓   | Last. ↓ | App Type ↓          | Visl. ↓ |   |
|--------|----------------|-----------|-----------|---------|---------------------|---------|---|
| 1      | All Tabs       | AllTabSet |           | 31/03/. | Classic             |         | ▼ |
| 2      | Analytics Stu. | Insights  | Build CR. | 31/03/. | Classic             | ✓       | ▼ |
| 3      | App Launcher   | AppLaun.  | App Lau.  | 06/04/. | Classic             | ✓       | ▼ |
| 4      | Bolt Solutions | Lightnin. | Discover. | 31/03/. | Lightning           | ✓       | ▼ |
| 5      | Chatter Desk.  | Chatter.  | Chatter . | 31/03/. | Connected (Managed) |         | ▼ |
| 6      | Chatter Mobi.  | Chatter.  | The Sale. | 31/03/. | Connected (Managed) |         | ▼ |
| 7      | Community      | Communi.  | Salesfor. | 31/03/. | Classic             | ✓       | ▼ |
| 8      | Content        | Content   | Salesfor. | 31/03/. | Classic             | ✓       | ▼ |
| 9      | Data Manager   | DataMan.  | Use Dat.  | 31/03/. | Lightning           | ✓       | ▼ |
| 10     | Designing      | Designer  |           | 05/04/. | Lightning           | ✓       | ▼ |
| 11     | Designing      | Designing |           | 05/04/. | Connected           |         | ▼ |
| 12     | Digital Exper. | Salesfor. | Manage .  | 31/03/. | Lightning           | ✓       | ▼ |

- Click New Lightning App. Enter School Management as the App Name, then click Next

**New Lightning App**

### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

#### App Details

**App Name** ⓘ

**Developer Name** ⓘ

**Description** ⓘ

#### App Branding

**Image** ⓘ

**Primary Color Hex Value** ⓘ

**Org Theme Options**

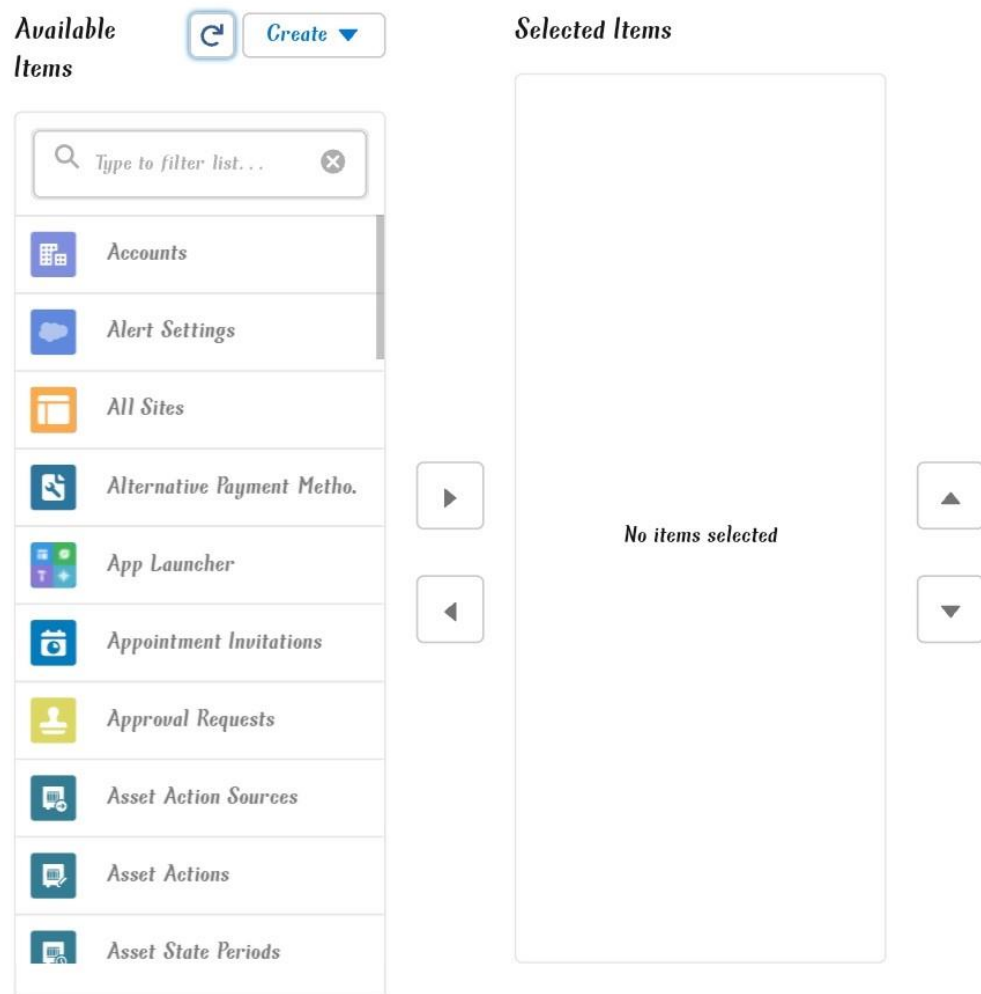
☐ Use the app's image and color instead of the org's custom theme

**App Launcher Preview**

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

## Navigation Items

tems to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but not delete items. The items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar if the app is viewed in a format that the item doesn't support.



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

### Activity:

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.

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.

4. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field labels.

Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it. For example, a phone number is a number field. For that we need to select the phone as data type. Let's 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.

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.

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 to aggregate. click Next, Next and save.

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 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.

Let's create a Pick-List field:

1. From Setup, click Object Manager and select Student.

2. Click Fields & Relationships, then New.

3. Select Pick list 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

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.

Activity-3: Creation of fields for the Parent 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.
4. Select the Phone as the Data Type, then click Next.
5. For Field Label, enter Parent Number.
6. Click Next, Next, then Save & New

## 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.



## He

All Profiles 


[Edit](#) | [Delete](#) | [Create New View](#)









[New Profile](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y


| <input type="checkbox"/> | Action                                                          | Profile Name ↑                                     | User License                     | Custom                              |
|--------------------------|-----------------------------------------------------------------|----------------------------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Analytics Cloud Integration User</a>   | Analytics Cloud Integration User | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Analytics Cloud Security User</a>      | Analytics Cloud Integration User | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Authenticated Website</a>              | Authenticated Website            | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Authenticated Website</a>              | Authenticated Website            | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Chatter External User</a>              | Chatter External                 | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Chatter Free User</a>                  | Chatter Free                     | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Chatter Moderator User</a>             | Chatter Free                     | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Contract Manager</a>                   | Salesforce                       | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Cross Org Data Proxy User</a>          | XOrg Proxy User                  | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">C.</a> | <a href="#">Custom: Marketing Profile</a>          | Salesforce                       | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">C.</a> | <a href="#">Custom: Sales Profile</a>              | Salesforce                       | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">C.</a> | <a href="#">Custom: Support Profile</a>            | Salesforce                       | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Customer Community Login User</a>      | Customer Community Login         | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Customer Community Plus Login User</a> | Customer Community Plus Login    | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Customer Community Plus User</a>       | Customer Community Plus          | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Customer Community User</a>            | Customer Community               | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Customer Portal Manager Custom</a>     | Customer Portal Manager Custom   | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Customer Portal Manager Standard</a>   | Customer Portal Manager Standard | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">External Apps Login User</a>           | External Apps Login              | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">External Identity User</a>             | External Identity                | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Force.com - App Subscription User</a>  | Force.com - App Subscription     | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Force.com - Free User</a>              | Force.com - Free                 | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">Gold Partner User</a>                  | Gold Partner                     | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">High Volume Customer Portal</a>        | High Volume Customer Portal      | <input type="checkbox"/>            |
| <input type="checkbox"/> | <a href="#">Edit</a>   <a href="#">Clone</a>                    | <a href="#">High Volume Customer Portal User</a>   | High Volume Customer Portal      | <input type="checkbox"/>            |


3.For Profile Name, enter School profile.





Search Setup





SETUP

Profiles

## Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

= Required Information

|                  |                      |
|------------------|----------------------|
| Existing Profile | Standard User        |
| User License     | Salesforce           |
| Profile Name     | <input type="text"/> |

Save

Cancel

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



SETUP

## Permission Sets

## Permission Sets

Help

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store [iOS](#) / [Android](#)

All Permission Sets ▾ [Edit](#) / [Delete](#) / [Create New View](#)

| New                      |                                             | A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y |                                                |                            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------|----------------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
|                          | Action                                      | Permission Set Label ↑                                                                            | Description                                    | License                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Buyer</a>                                                                             | Allows access to the store. Lets users see p.  | B2B Buyer Permission Set   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Buyer Manager</a>                                                                     | Includes all Buyer capabilities, and allows a. | B2B Buyer Manager Perm     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">CRM User</a>                                                                          | Denotes that the user is a Sales Cloud or Se.  | CRM User                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Commerce Admin</a>                                                                    | Allow access to commerce admin features.       | Commerce Admin Permissi    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Contact Center Admin</a>                                                              | Manage Service Cloud Voice contact centers.    | Service Cloud Voice User   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Contact Center Agent</a>                                                              | Access agent features in Service Cloud Voic.   | Service Cloud Voice User   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Contact Center Supervisor</a>                                                         | Access supervisor features in Service Cloud.   | Service Cloud Voice User   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Del</a>   <a href="#">Clone</a> | <a href="#">Experience Profile Manager</a>                                                        |                                                | Salesforce                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Facility Manager</a>                                                                  | Lets users create, read, edit, and delete lo.  | Facility Manager           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">FieldServiceMobileStandardPermSet</a>                                                 | Give your mobile workforce access to the Fi.   | Field Service Mobile       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Merchandiser</a>                                                                      | Allow access to commerce merchandising fe.     | Commerce Merchandiser L    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Agent</a>                                                            | Read Access to all entities enabled by Order.  | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Operations Manager</a>                                               | Access to all features enabled by Order Ma.    | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Shopper</a>                                                          | Limited access to Order Management featur.     | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Store Associate</a>                                                  | Access to limited features enabled by Order.   | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Del</a>   <a href="#">Clone</a> | <a href="#">Principal permission</a>                                                              |                                                |                            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Queue Manager</a>                                                                     | Lets users create, read, edit, and delete qu.  | Queue Manager              |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Sales Cloud User</a>                                                                  | Denotes that the user is a Sales Cloud user.   | Sales User                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Salesforce CMS Integration Admin</a>                                                  | Gives the admin data access and the permiss.   | Cloud Integration User     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Salesforce Console User</a>                                                           | Enable Salesforce Console User                 | Sales Console User         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Security Center Integration User</a>                                                  | Access Security Center for Integration         | Cloud Integration User     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Service Cloud User</a>                                                                | Denotes that the user is a Service Cloud use.  | Service User               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Shopper</a>                                                                           | Allow access to B2C Commerce features.         | Commerce User              |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Slack Service User</a>                                                                | Lets users run the flows for swarming wit.     | Slack Service User         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Standard Einstein Activity Capture</a>                                                | Access to Standard Einstein Activity Capture   | Standard Einstein Activity |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

## Activity:


### Creating a Users:








1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'Users' entered and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'All Users' and includes a 'New User' button. Below the title is a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Akila', 'Chatter Expert', 'K. Akila Devi', 'Principal', 'Teachers', 'User Integration', and 'User Security'. At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.


| Action                        | Full Name        | Alias   | Username                                                      | Role | Active | Profile                          |
|-------------------------------|------------------|---------|---------------------------------------------------------------|------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Akila            | akila   | akilarads@gmail.com                                           |      | ✓      | Work.com Only User               |
| <input type="checkbox"/> Edit | Chatter Expert   | Chatter | chatty_0042u00000rrfdjsaj.Zhsrmhqw88an@chatter.salesforce.com |      | ✓      | Chatter Free User                |
| <input type="checkbox"/> Edit | K. Akila Devi    | AK      | akiladevi@company.com                                         |      | ✓      | System Administrator             |
| <input type="checkbox"/> Edit | Principal        | pprin   | princg@acme.com                                               |      | ✓      | Work.com Only User               |
| <input type="checkbox"/> Edit | Teachers         | teac    | akil@acme.com                                                 |      | ✓      | Work.com Only User               |
| <input type="checkbox"/> Edit | User Integration | integ   | integration@0042u00000rrfdjsaj.com                            |      | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security    | sec     | insightsecurity@0042u00000rrfdjsaj.com                        |      | ✓      | Analytics Cloud Security User    |

3. 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 is the same as the email address.
4. Select a User License As salesforce.
5. Select a profile as a School profile.
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.



[Setup](#)
[Home](#)
[Object Manager](#)



SETUP

Users

## New User

[Help for this page](#)

User Edit

[Save](#)
[Save & New](#)
[Cancel](#)

General Information

= Required Info

|            |                      |                                      |                                     |
|------------|----------------------|--------------------------------------|-------------------------------------|
| First Name | <input type="text"/> | Role                                 | <None Specified>                    |
| Last Name  | <input type="text"/> | User License                         | Partner App Subscription            |
| Alias      | <input type="text"/> | Profile                              | Partner App Subscription User       |
| Email      | <input type="text"/> | Active                               | <input checked="" type="checkbox"/> |
| Username   | <input type="text"/> | Marketing User                       | <input type="checkbox"/>            |
| Nickname   | <input type="text"/> | Offline User                         | <input type="checkbox"/>            |
| Title      | <input type="text"/> | Knowledge User                       | <input type="checkbox"/>            |
| Company    | <input type="text"/> | Flow User                            | <input type="checkbox"/>            |
| Department | <input type="text"/> | Service Cloud User                   | <input type="checkbox"/>            |
| Division   | <input type="text"/> | Site.com Contributor User            | <input type="checkbox"/>            |
|            |                      | Site.com Publisher User              | <input type="checkbox"/>            |
|            |                      | WDC User                             | <input type="checkbox"/>            |
|            |                      | Data.com User Type                   | --None--                            |
|            |                      | Data.com Monthly Addition Limit      | Default Limit (300)                 |
|            |                      | Accessibility Mode (Classic Only)    | <input type="checkbox"/>            |
|            |                      | High-Contrast Palette on Charts      | <input type="checkbox"/>            |
|            |                      | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> |

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

## Activity-1:

Permission sets 1:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New



SETUP

## Permission Sets

## Permission Sets

Help

On this page you can create, view, and manage permission sets.


In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store [iOS](#) / [Android](#)









All Permission Sets ▾ [Edit](#) / [Delete](#) / [Create New View](#)

| New                      |                                             | A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y |                                                |                            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------|----------------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
|                          | Action                                      | Permission Set Label ↑                                                                            | Description                                    | License                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Buyer</a>                                                                             | Allows access to the store. Lets users see p.  | B2B Buyer Permission Set   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Buyer Manager</a>                                                                     | Includes all Buyer capabilities, and allows a. | B2B Buyer Manager Perm     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">CRM User</a>                                                                          | Denotes that the user is a Sales Cloud or Se.  | CRM User                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Commerce Admin</a>                                                                    | Allow access to commerce admin features.       | Commerce Admin Permissi    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Contact Center Admin</a>                                                              | Manage Service Cloud Voice contact centers.    | Service Cloud Voice User   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Contact Center Agent</a>                                                              | Access agent features in Service Cloud Voic.   | Service Cloud Voice User   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Contact Center Supervisor</a>                                                         | Access supervisor features in Service Cloud.   | Service Cloud Voice User   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Del</a>   <a href="#">Clone</a> | <a href="#">Experience Profile Manager</a>                                                        |                                                | Salesforce                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Facility Manager</a>                                                                  | Lets users create, read, edit, and delete lo.  | Facility Manager           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">FieldServiceMobileStandardPermSet</a>                                                 | Give your mobile workforce access to the Fi.   | Field Service Mobile       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Merchandiser</a>                                                                      | Allow access to commerce merchandising fe.     | Commerce Merchandiser L    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Agent</a>                                                            | Read Access to all entities enabled by Order.  | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Operations Manager</a>                                               | Access to all features enabled by Order Ma.    | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Shopper</a>                                                          | Limited access to Order Management featur.     | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Order Management Store Associate</a>                                                  | Access to limited features enabled by Order.   | Lightning Order Managem    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Del</a>   <a href="#">Clone</a> | <a href="#">Principal permission</a>                                                              |                                                |                            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Queue Manager</a>                                                                     | Lets users create, read, edit, and delete qu.  | Queue Manager              |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Sales Cloud User</a>                                                                  | Denotes that the user is a Sales Cloud user.   | Sales User                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Salesforce CMS Integration Admin</a>                                                  | Gives the admin data access and the permiss.   | Cloud Integration User     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Salesforce Console User</a>                                                           | Enable Salesforce Console User                 | Sales Console User         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Security Center Integration User</a>                                                  | Access Security Center for Integration         | Cloud Integration User     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Service Cloud User</a>                                                                | Denotes that the user is a Service Cloud use.  | Service User               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Shopper</a>                                                                           | Allow access to B2C Commerce features.         | Commerce User              |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Slack Service User</a>                                                                | Lets users run the flows for swarming wit.     | Slack Service User         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <input type="checkbox"/> | <a href="#">Clone</a>                       | <a href="#">Standard Einstein Activity Capture</a>                                                | Access to Standard Einstein Activity Capture   | Standard Einstein Activity |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |




2. Give the name of the Permission set name 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





Search Setup

Setup

Home

Object Manager

Permission

Users

Permission Set Groups

**Permission Sets**

Custom Code

Custom Permissions

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

SETUP

Permission Sets

Permission Set

Create

Help for this Page

Save

Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required

☐

Select the type of users who will use this permission set

**Who will use this permission set?**

-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

**Not sure what a permission set license is? [Learn more here.](#)**

License

--None--

Save

Cancel





Search Setup

- Permission
- Users
- Permission Set Groups
- Permission Sets
- Custom Code
- Custom Permissions

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

...

PERMISSION SET TEACHER PERMISSION 2

MANAGE ASSIGNMENT EXPIRATION

Teacher Permission 2

Select Users to Assign

Recently Viewed

1 item • Updated a few seconds ago

Search this list...

Settings

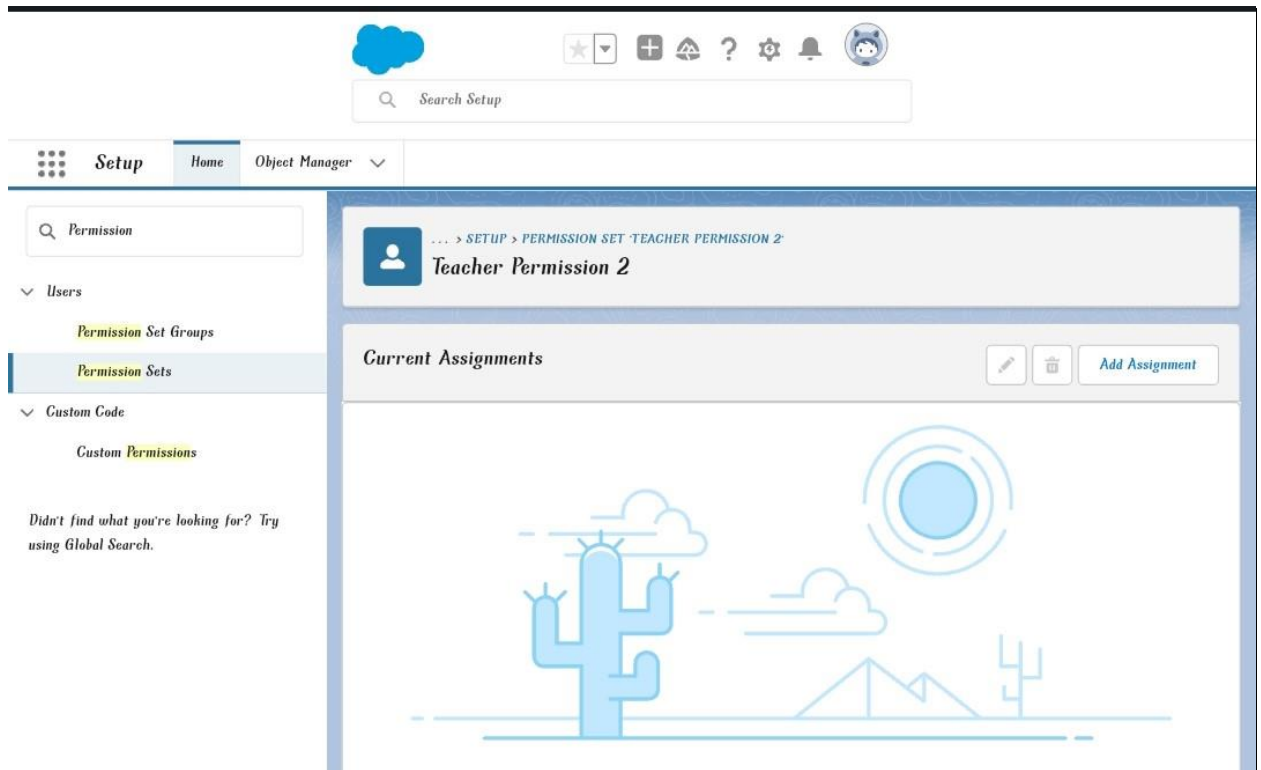
Refresh

Filter

|                          | Full Name                          | Title | Phone | Email                |
|--------------------------|------------------------------------|-------|-------|----------------------|
| <input type="checkbox"/> | <div><div></div>Akila Devi K</div> |       |       | ahilaroads@gmail.com |

Cancel

Next



## Activity-2:

### Permission sets 2:

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

## Activity:

### Reports :

1. From the Reports tab, click New Report.



Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Search Report Types...

Recently Used Report Types

| Report Type Name | Category |
|------------------|----------|
| Parents          | Standard |

3. Customize your report, then save or run it.



**Trailhead Profile public URL**

Team Lead- <https://trailblazer.me/id/bhuvk145>

Team Member 1- <https://trailblazer.me/id/muthv14>

Team Member 2- <https://trailblazer.me/id/adevi219>

Team Member 3- [trailblazer.me/id/deepa1768](https://trailblazer.me/id/deepa1768)

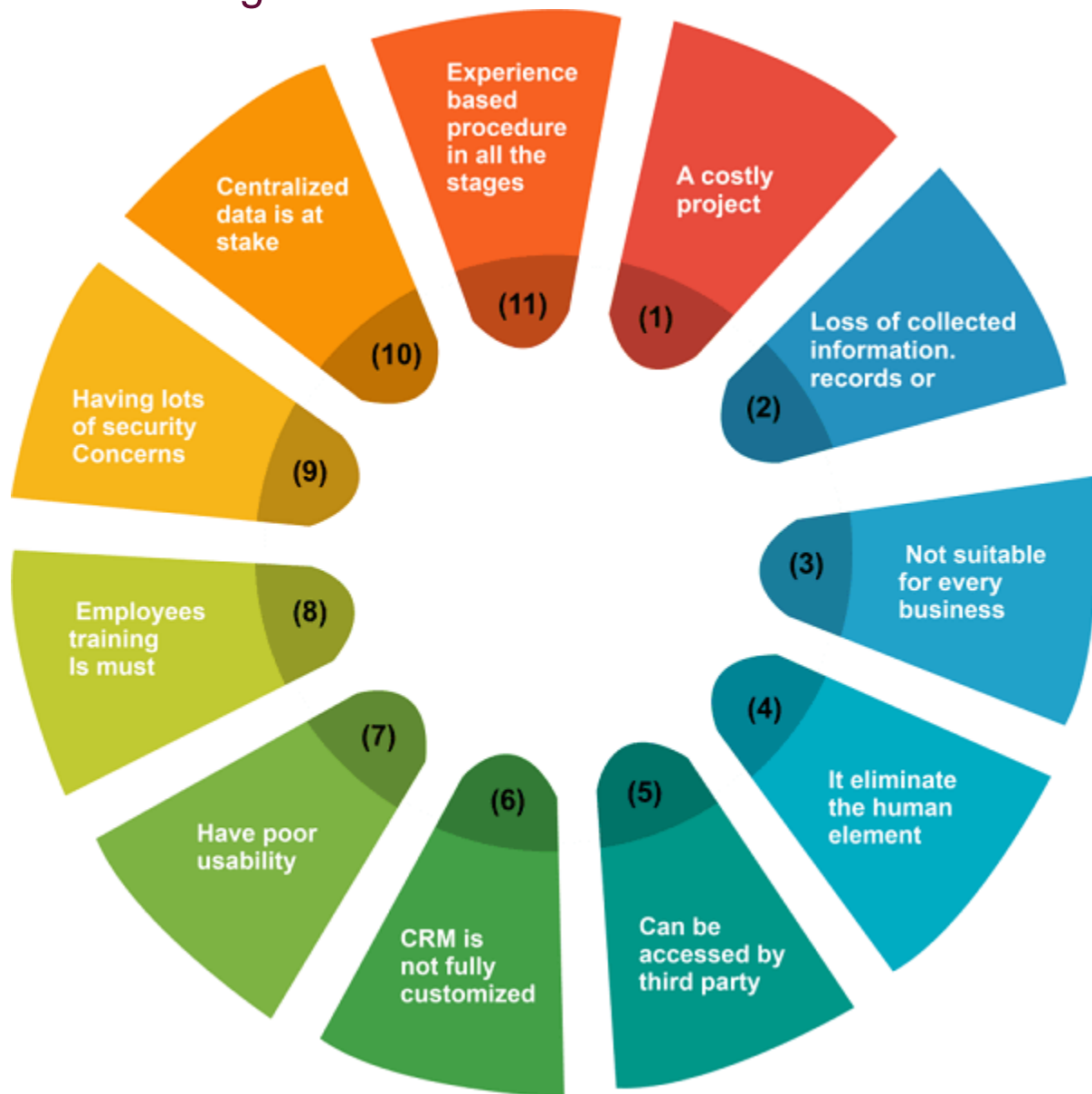
**ADVANTAGES & DISADVANTAGES****Advantages:**

## Advantages of CRM



**Disadvantages:**

## Disadvantages of CRM





## Application

CRM stands for “Customer Relationship Management” and is a software system that helps business owners easily track all communications and nurture relationships with their leads and clients.

A CRM replaces the multitude of spreadsheets, databases and apps that many businesses patch together to track client data.

## Conclusion

CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases. By implementing a CRM into your retail sales process, you can enhance customer relationships by providing personalized service that caters to their individual needs.

## Future Scope

The future of CRM is bright. CRM will continue to report key data and give insight for future action, however, leading experts see CRM evolving to [measure and inform sales enablement](#) and customer engagement while playing a tremendous role in the success of future business.

At this session of Dreamforce, led by John Taschek Senior Vice President of Market Strategy at Salesforce, panelists Paul Greenberg, Denis Pombriant, and Ray Wang weigh in on important considerations for the future of sales, marketing, and customer engagement. These leading CRM experts recommend the following measures for future-proofing your company's sales