PROJECT isREPORT TEMPLATE

A CRM APPLICATION FOR SCHOOLS/COLLEGES

1 INTRODUCTION

1.1 Overview

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

This project helps you to maintain and manage the school related problems which further can be modified based on the requirements.

2 Problem Definition &Design Thinking

2.1 Empathy Map

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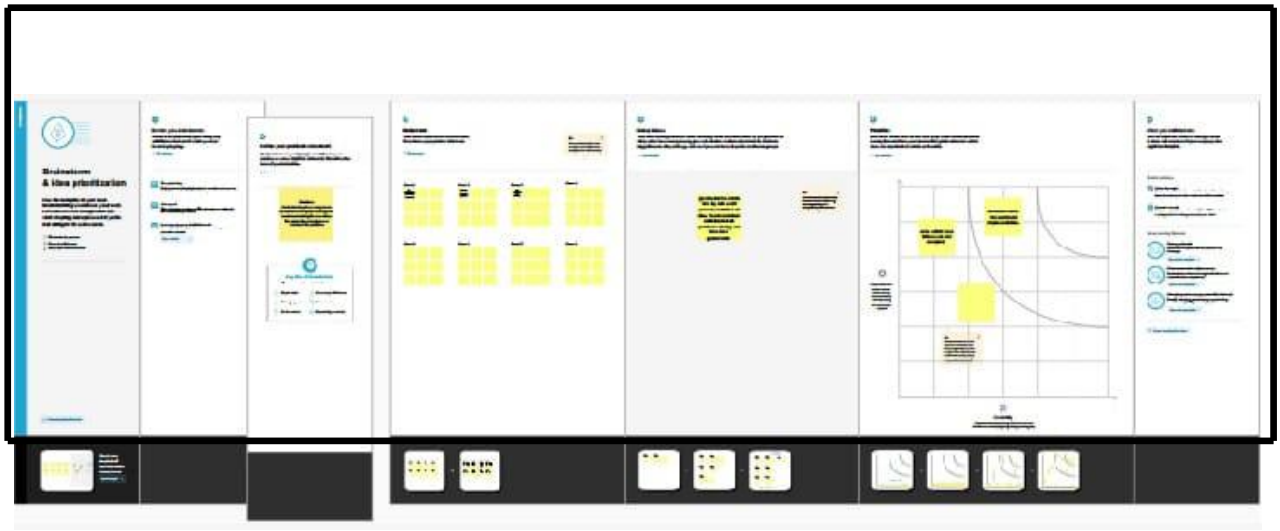
2.1 Ideation &Brainstorming Map



3 RESULT

3.1 Data Model

Object Name	Fields in the Object	
	Field Name	Data Type
School	Schools	Master-Details
Student	Students	Phone
Parent	Parents	Text Area

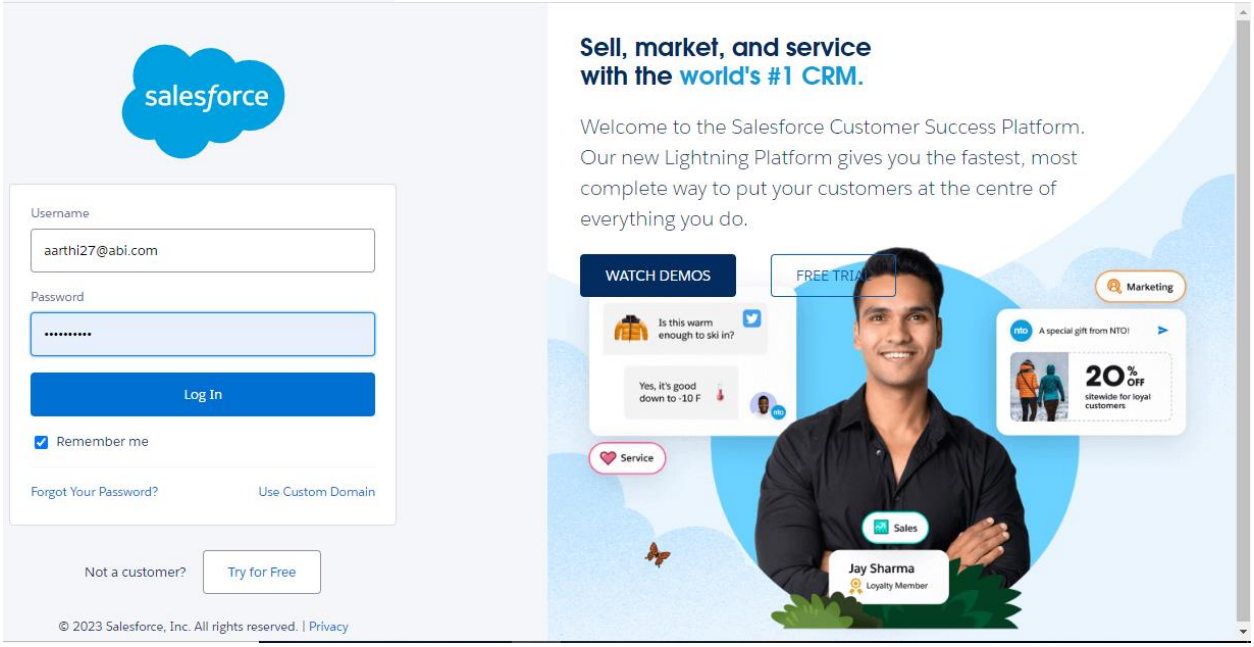
Name	School Name	Text (80)
Profile	Profile Name	School profile

3.2 ACTIVITY AND SCREENSHOTS

1.Creation of Salesforce platform

Go to Developer, Salesforce.com and click on sign up. **Enter our details as Name, Email, Role, Company etc. email is** send your mail.id.

Go to the inbox of the email that you used while signing up.click on the verify account to activate your account.



2. Creation of custom object: SCHOOL

Navigate to setup to select the object manager and create the object gives the detail like label name as school and enter the plura rd name, data type etc…and save it.

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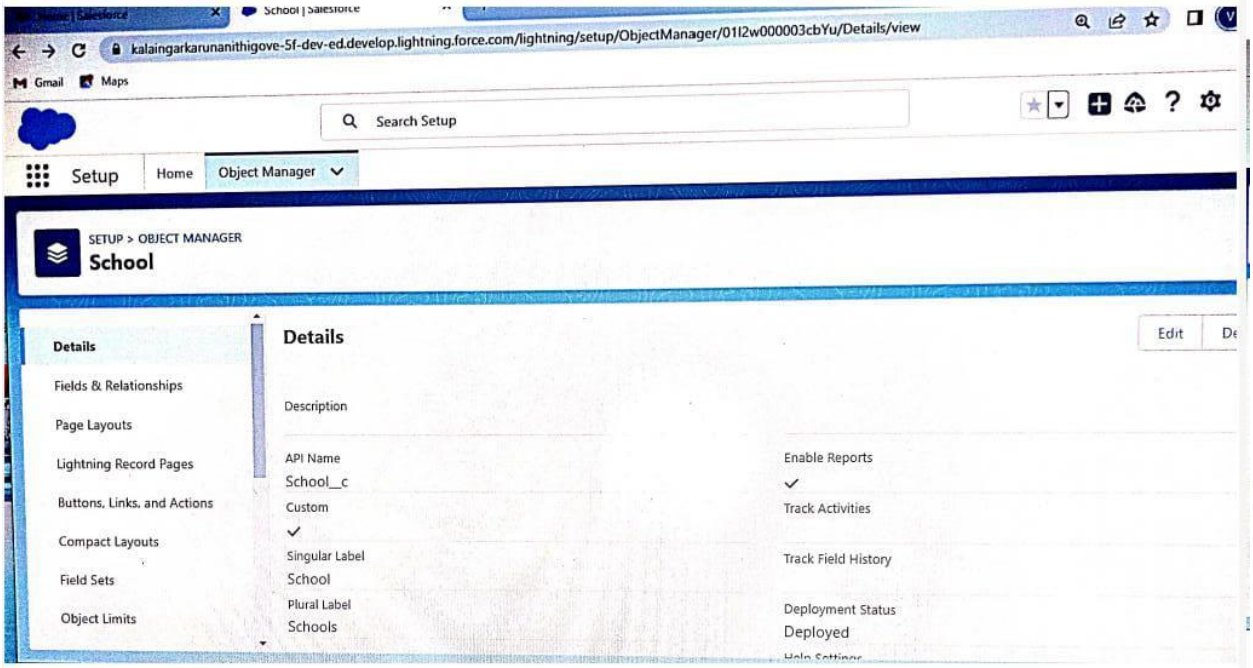
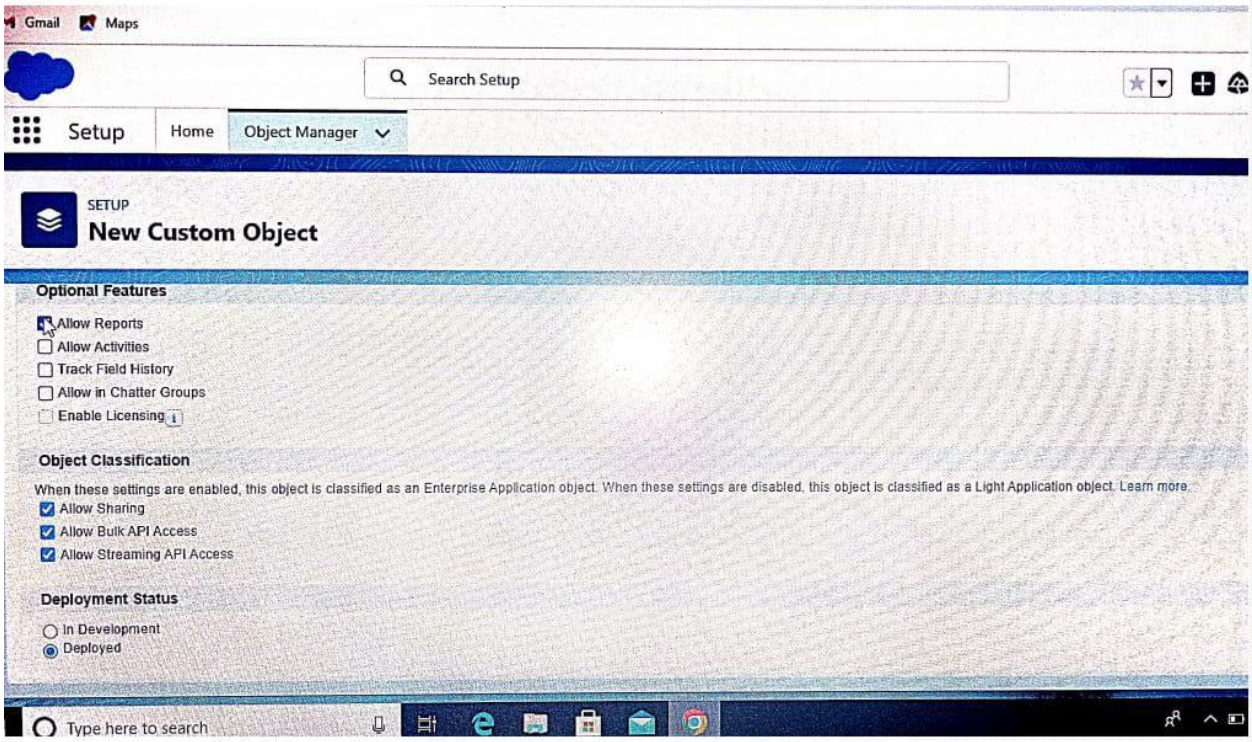
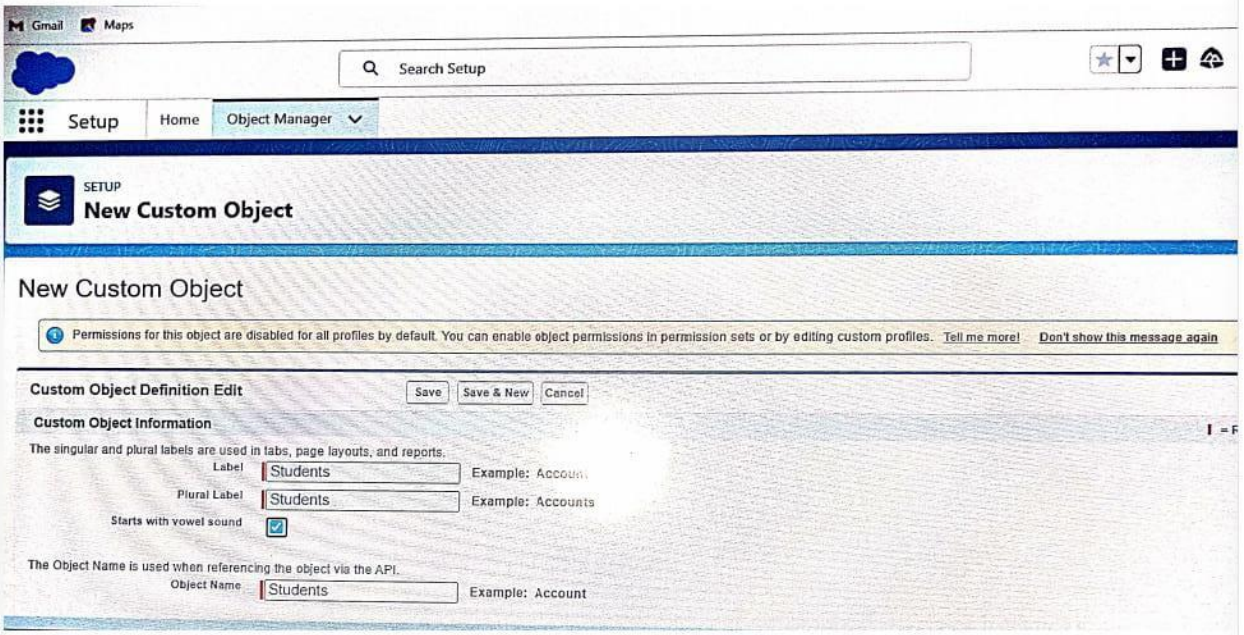




3 .Custom object: STUDENT



4.Custom object: PARENT

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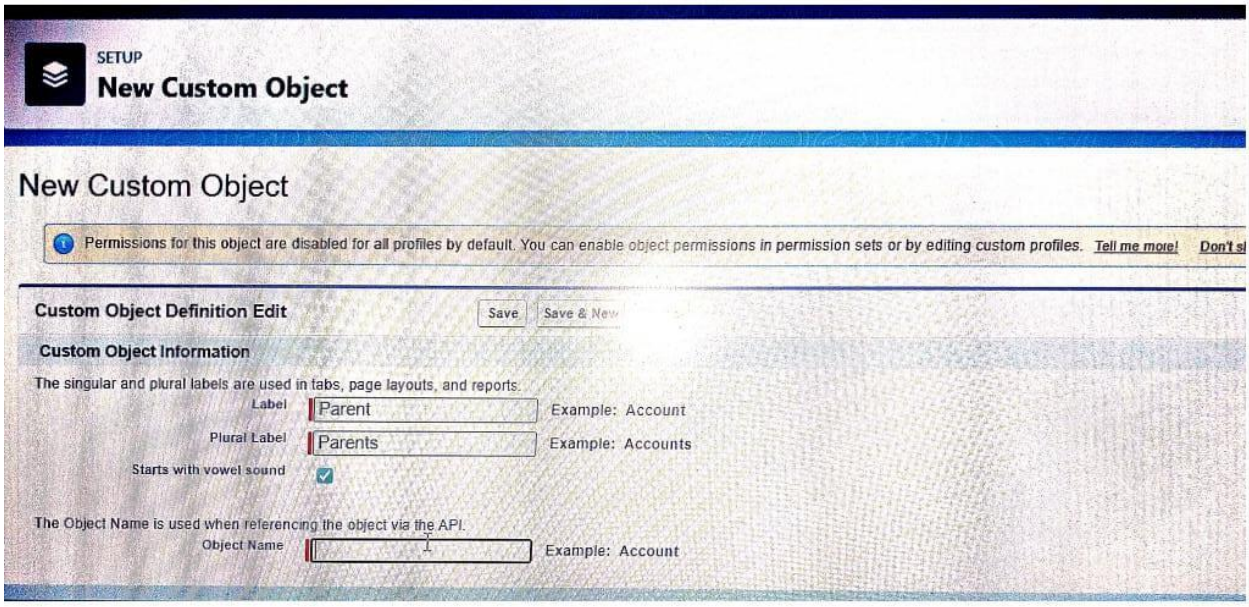
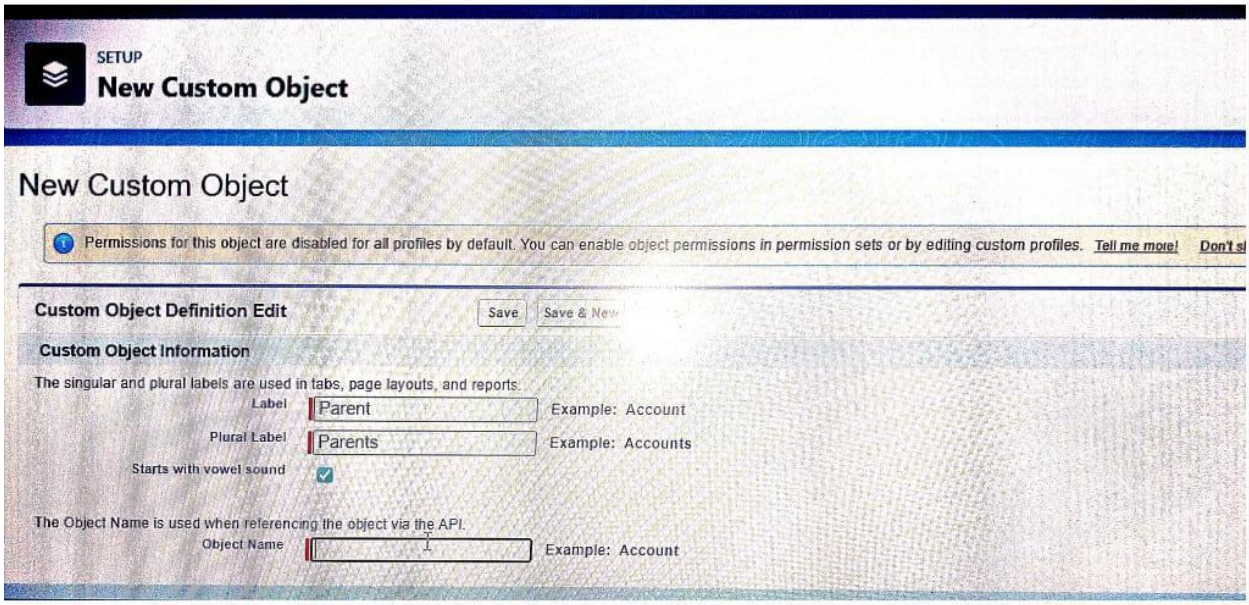

SETUP
New Custom Object
New Custom Object
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more!
Custom Object Definition Edit
Save
Save & New
Custom Object Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Parent
Example: Account
Plural Label
Parents
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Example: Account



5.Creation of App: SCHOOL MANAGEMENT

Navigate the setup and search for app manager. To Select the new lighting app option and give the app name as School Management and upload the picture. Click next.

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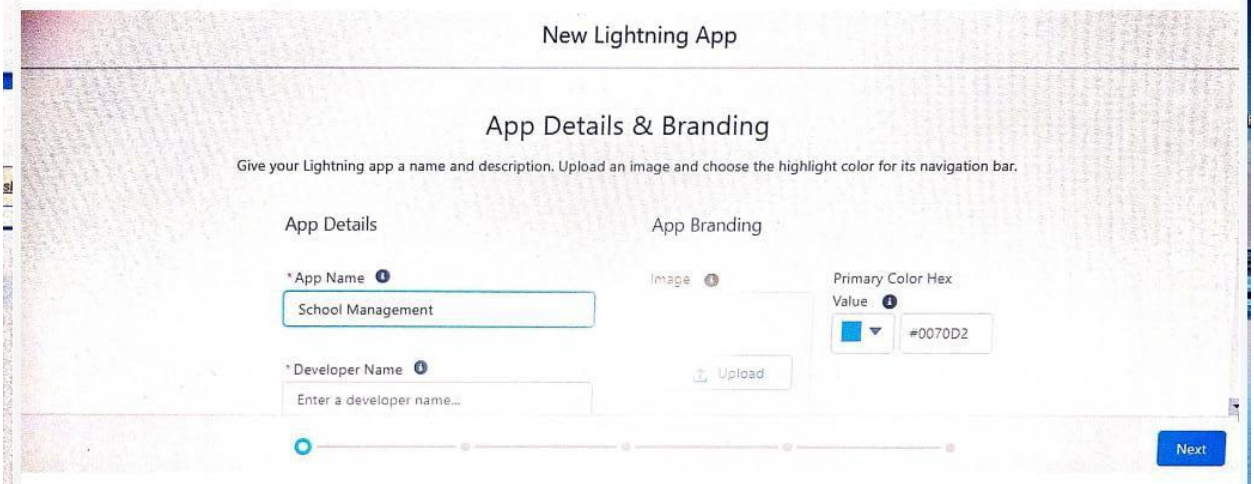

6.Creation of Field &Relationships on The Custom Object

An Object relationship in salesforce is a two-way associated between two objects.Relationships are created by creating custom relationship fields on an object.

Creation of fields: SCHOOL

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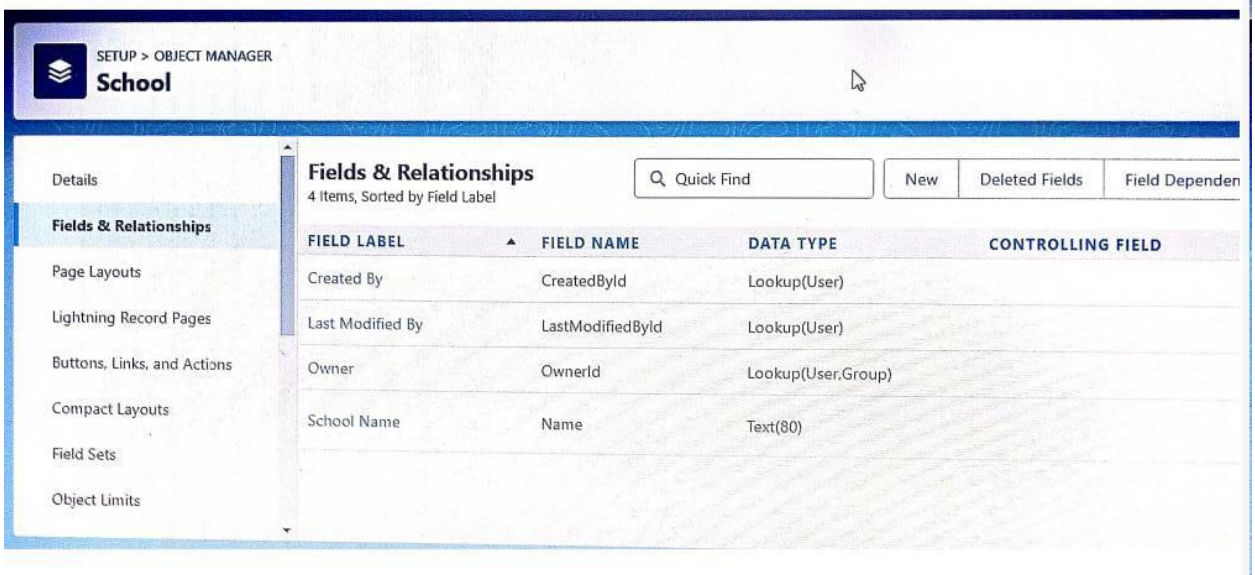
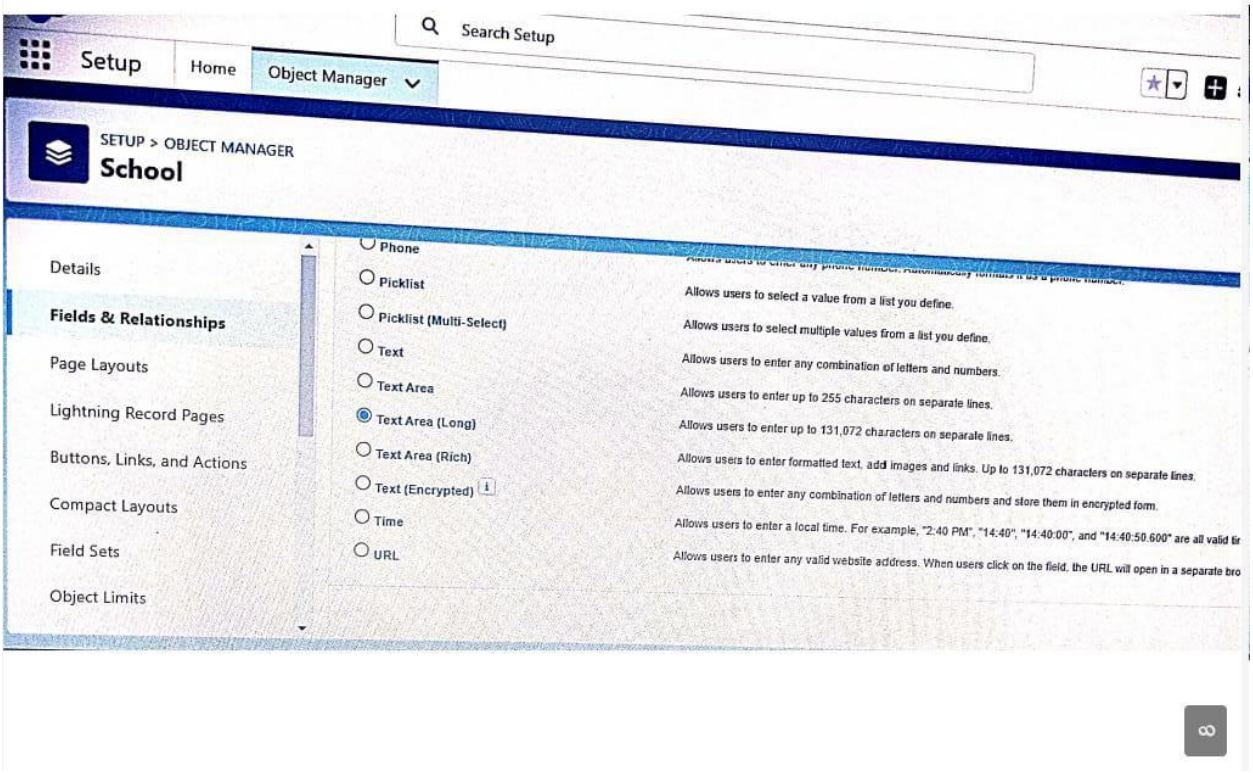
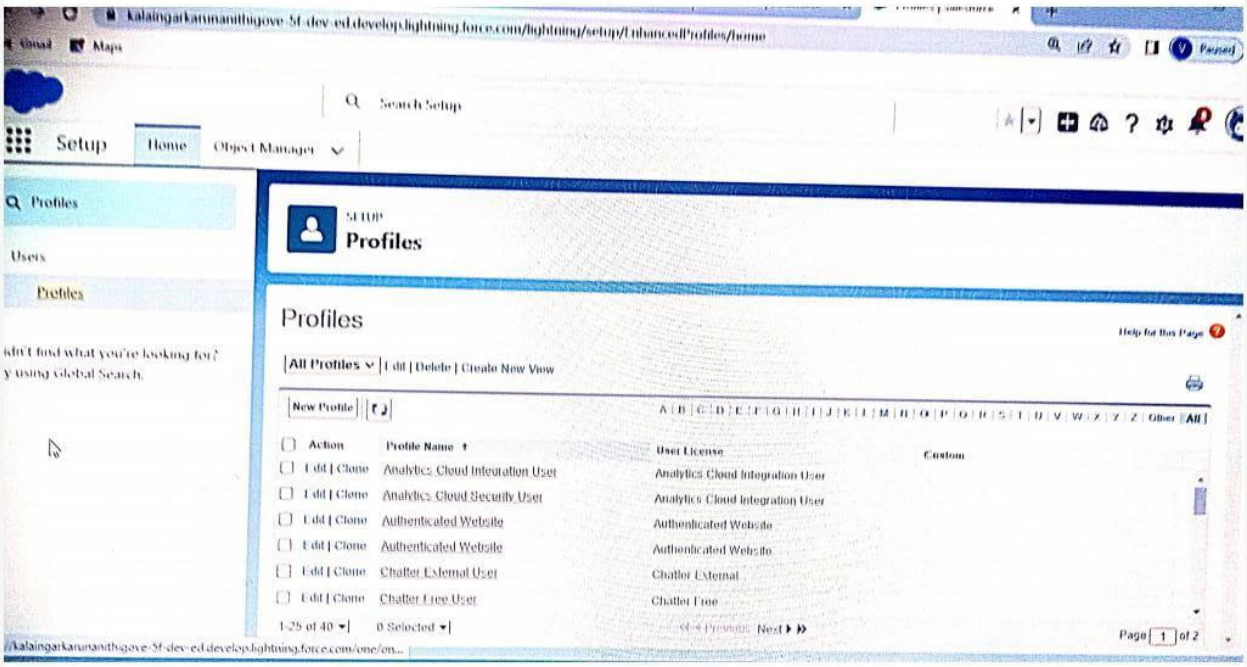




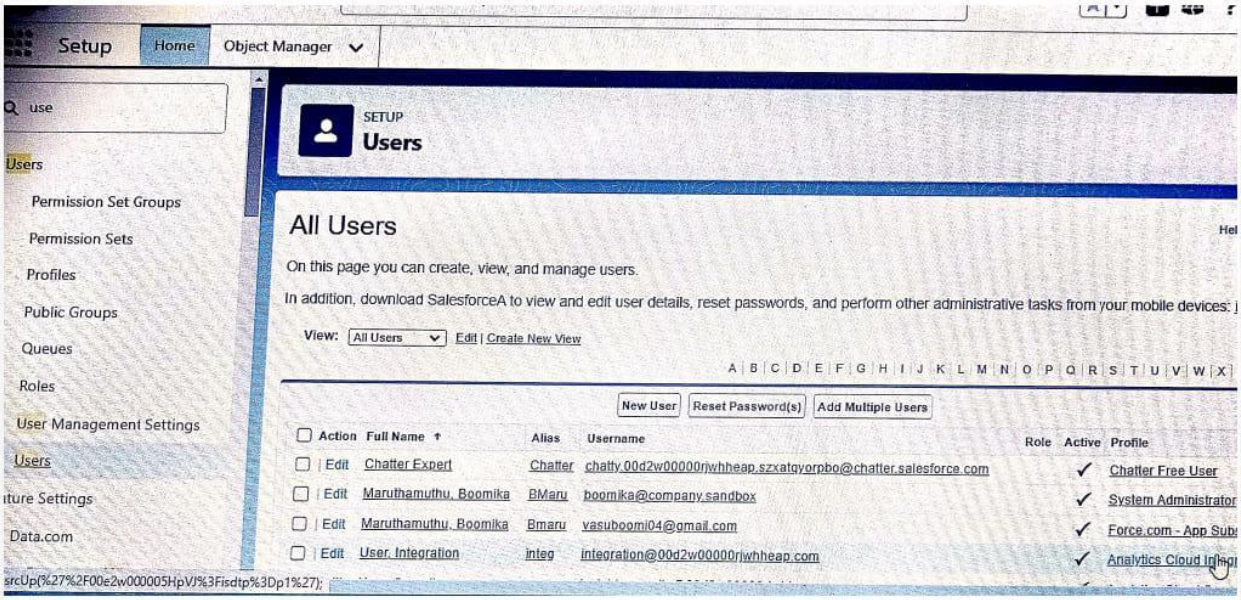
7.Creation of Profile

From Setup enter profiles in the Quick Find box,and select profiles.A profile is a group of settings and permission that define what a user can do in salesforce.A profile controls object permissions,field permissions,user permissions,tab settings.


Setup
Home
Object Manager
Search Setup
Profiles
Users
Profiles
SETUP
Profiles
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Edit | Clone
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Chatter External User
Chatter Free User
Chatter External
Chatter Free
1-25 of 40
0 Selected
Page 1 of 2

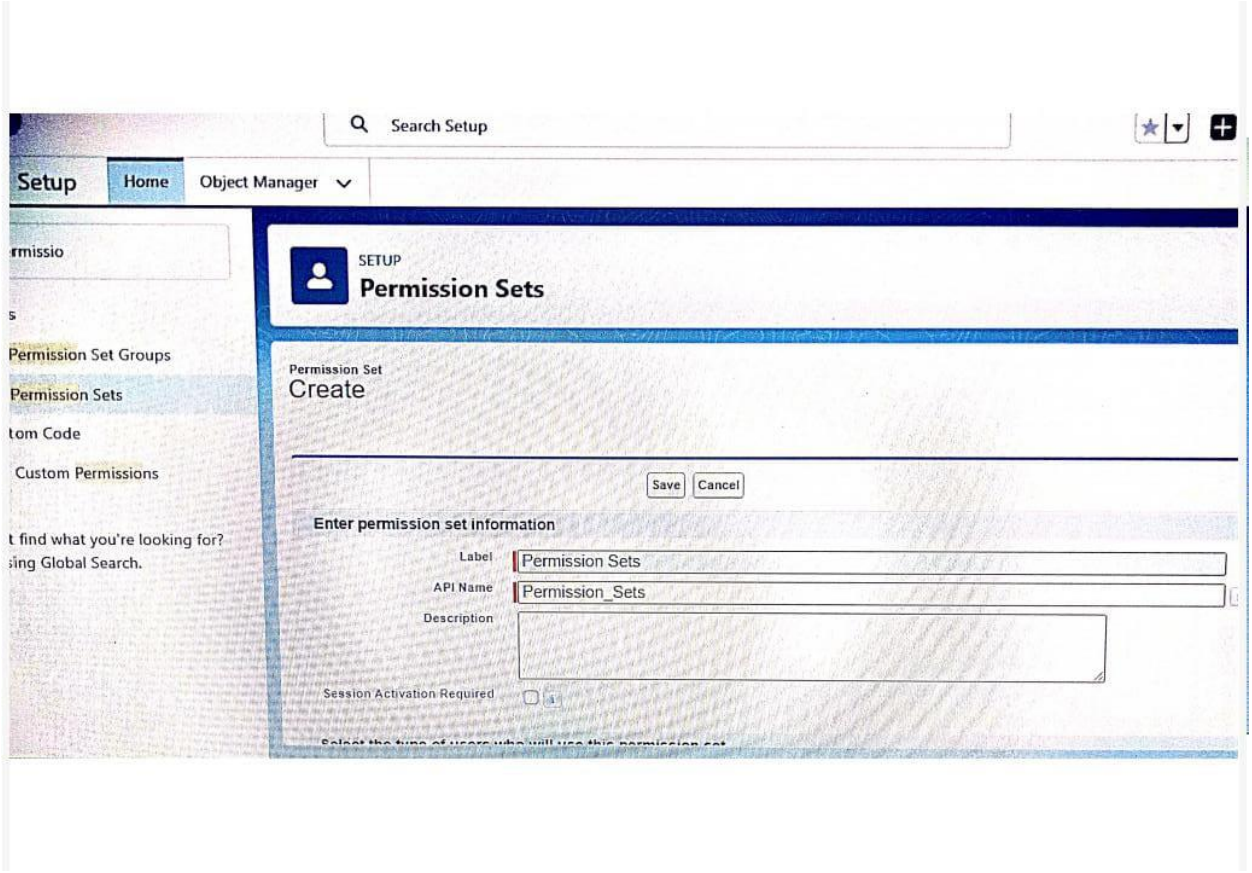
8.Creation of User

Navigate to setup in quick find search bar,search in user and select it.Give the first name and last name.Enter your email and enter your user name.select your user licence of salesforce.The profile field is standard user.



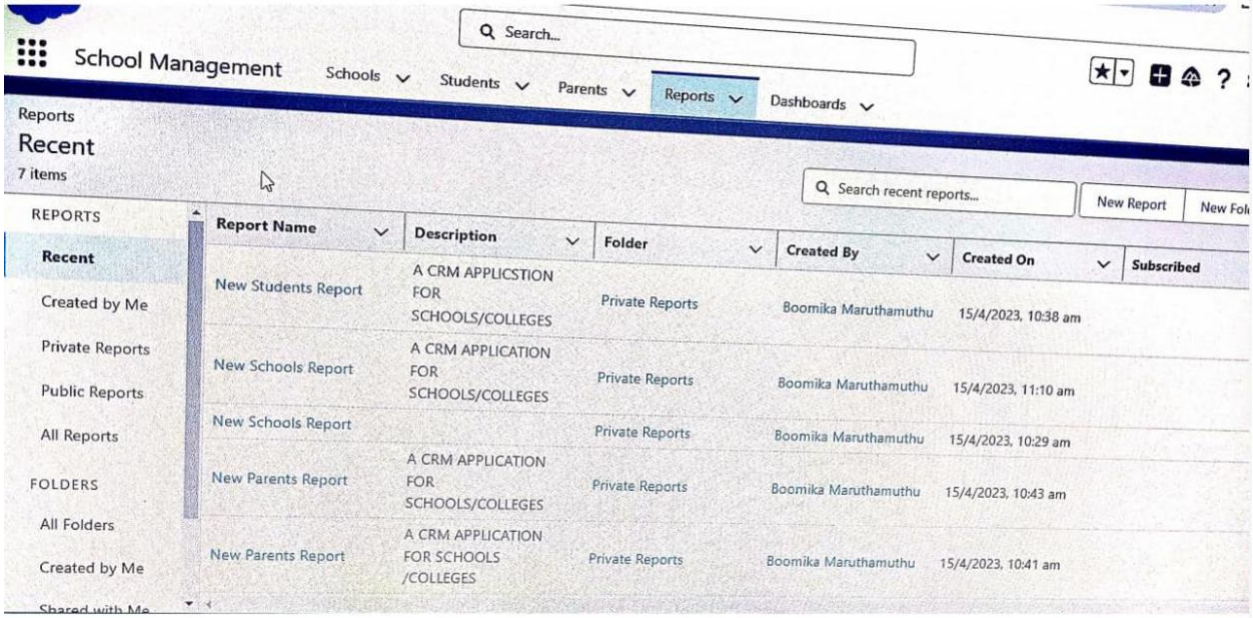
9.Creation of permission sets

From Setup,enter Permission Sets in the quick Find box, then Select permission



Creation of Reports

A report is a list of records that meet the criteria you define.It is displayed in rows and columns.



4.TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER:K.AARTHI -

https://trailblazer.me/id/akuppusamy3

TEAM MEMBER 1:T.ASWATHI -

https://trailblazer.me/id/aaswathi1

TEAM MEMBER 3: M.BOOMIKA -

https://trailblazer.me/id/bmaruthamuthu

TEAM MEMBER 4:N.DEEPA -

https://trailblazer.me/id/deepn28

5.ADVANTAGES

- .Improve student Admissions Iifecycle.
- Track Student Life-Cycles Within the Institution.
- Monitor Fee Payments and Remainders.
- Keep Alumni Information Safe and Accessible.

6.DISADVANTAGES

- Security concers associated with centralized data.
- It requires a process driven sales organization

- It may not suit every business.
- Staff over-reliance on CRM may diminish customer

7.APPLICATIONS

- A CRM is a system that helps schools manage the entire lifecycle of a potential customer.sometimes also referred to as a lead.with a CRM,you can track and store the data that important to your operations,all in one easy –to- access place.
- This CRM makes it easy for salesforce to track records of their activities,share information internally and keep in touch with their customers.

- A Good CRM helps you understand your market and the needs of your customers.

8.CONCLUSION

- The issues of CRM and customer service are vital in the developing environment as customer expections increase .This is especially the case in developing countries where changes in customer expectations are linked to increasing educational standards and literacy.
- It is benefial for the parents and students to learn about CRM.
- The project makes the students life style as well as easier and in good manner.

9.FUTURE SCOPE

- Measure and inform sales enablement.
- Unity sales,Marketing and Operations around common goals and Definitions.
- Focus on customer retention through customer-oriented process.
- Use mass pesonalisation through relevant data.

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