CRM APPLICATION FOR SCHOOL / COLLEGE

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

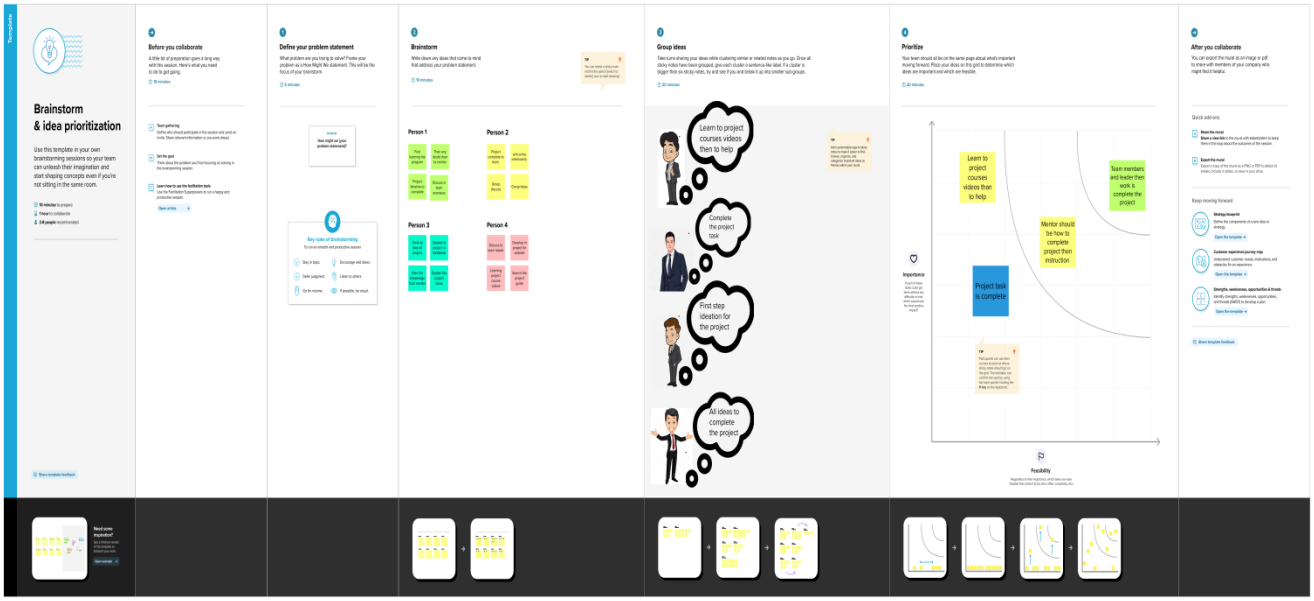
Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

2 Problem Definition & Design Thinking

2.1 Empathy map

2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model

Object name	Field in the Object
Object 1 **School**	**Field label** / **Data type** **Address** / **Text Area** **Phone Number** / **Phone** **Number of students** / **Roll-up-summary** **Highest mark** / **Roll-up-summary**
Object 2 **Student**	**Field label** / **Data type** **Phone Number** / **Phone** **School** / **Master-Details Relationship** **Result** / **Picklist** **Class** / **Number**

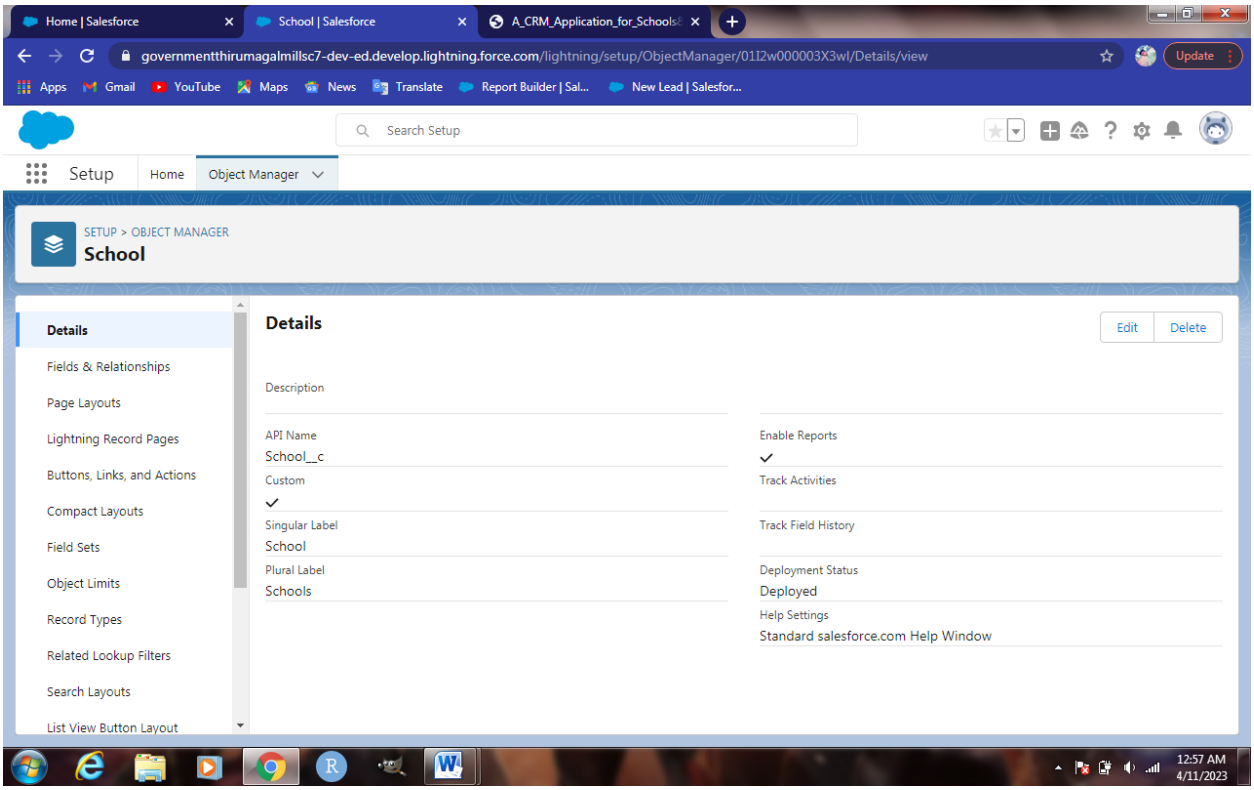
Object 3 Parent	

Field label	Data type
Parent Address	Text Area
Parent Number	Phone

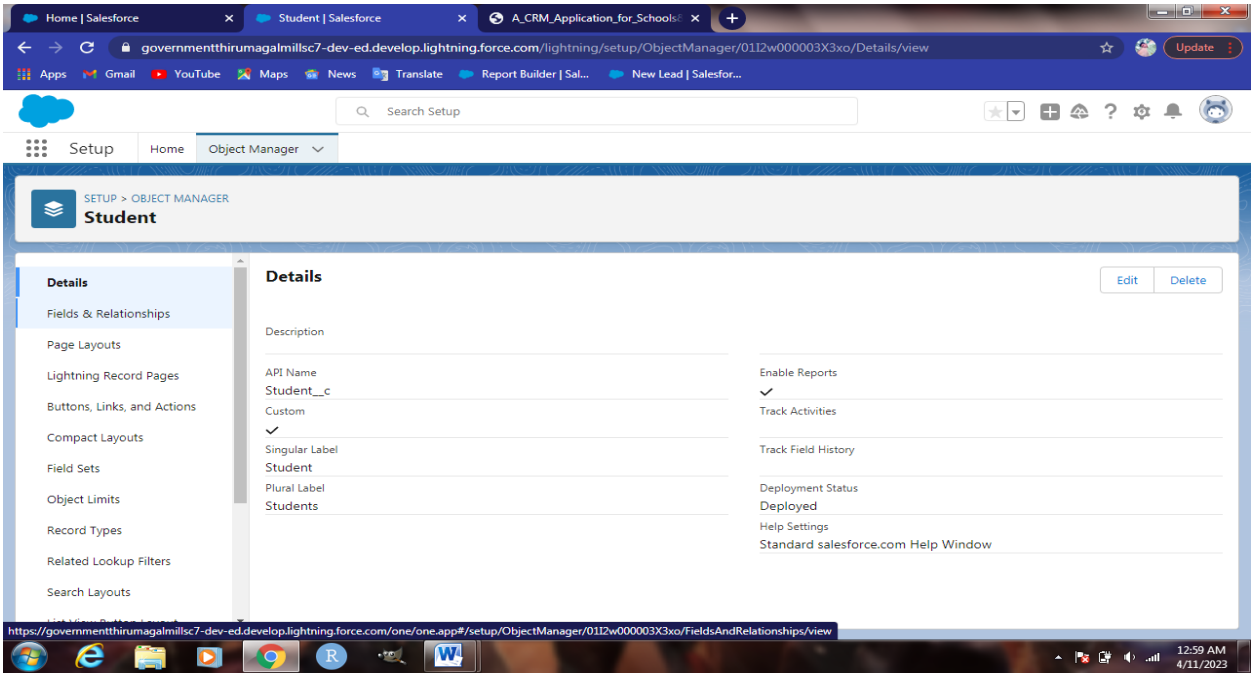
Milestone-1:Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

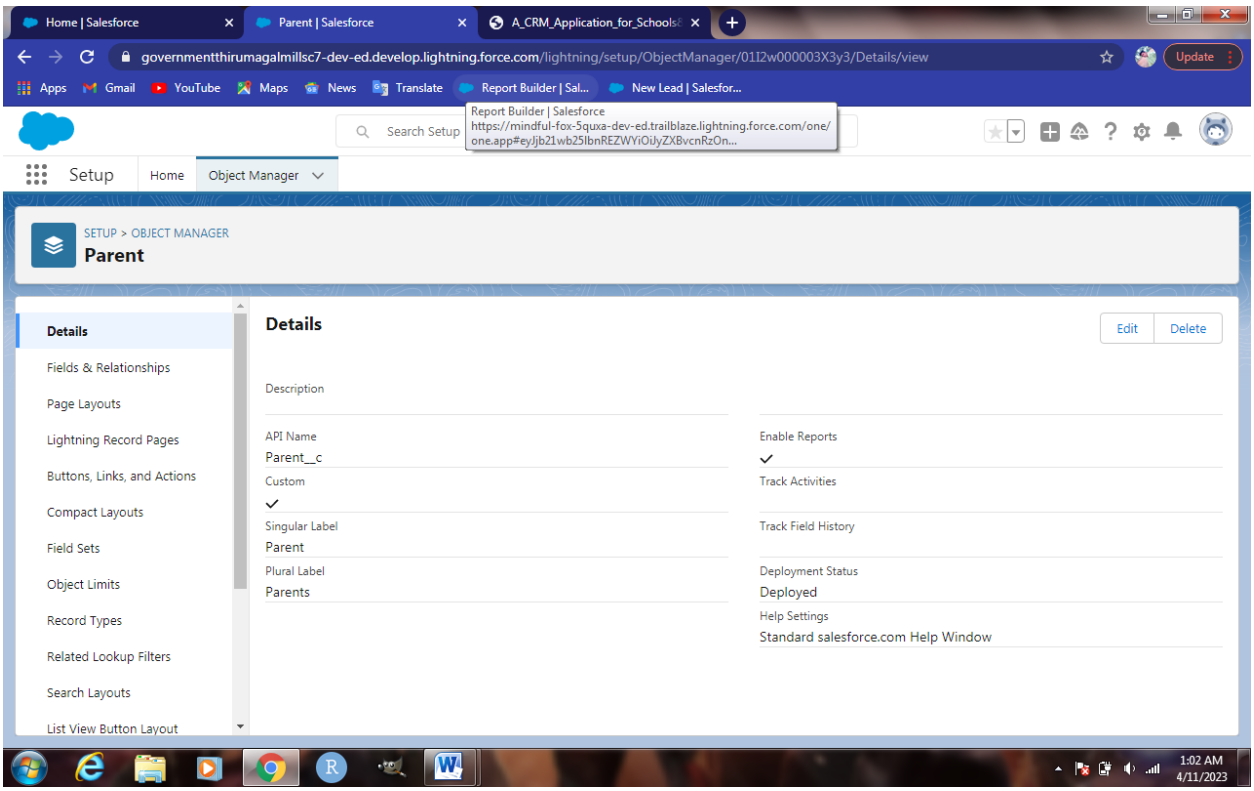
Activity-1: Creation of School Object



Activity 2: Create student object



Activity 3: Create parent object

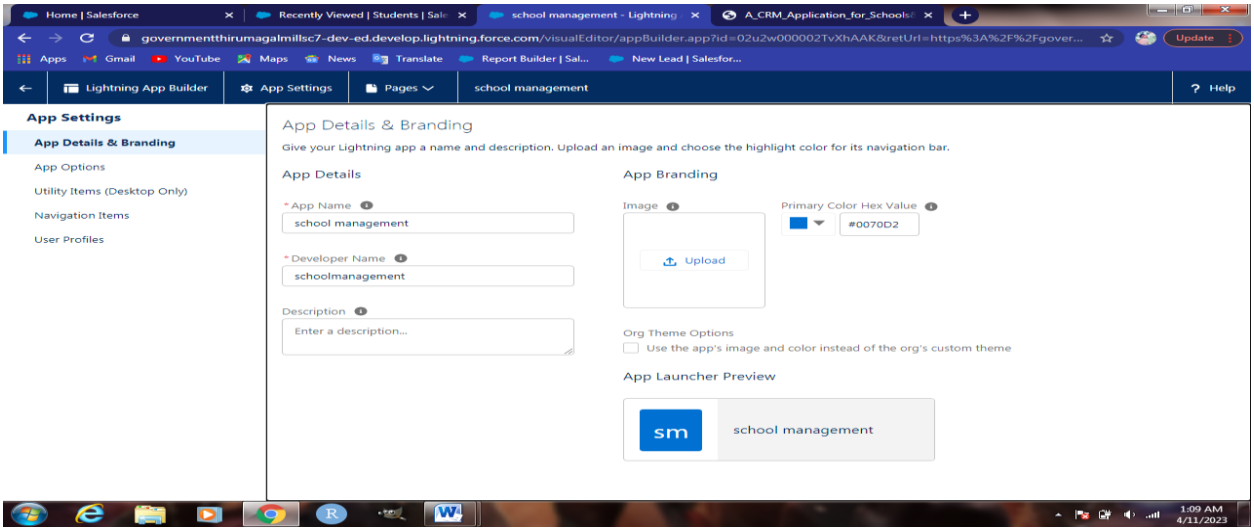


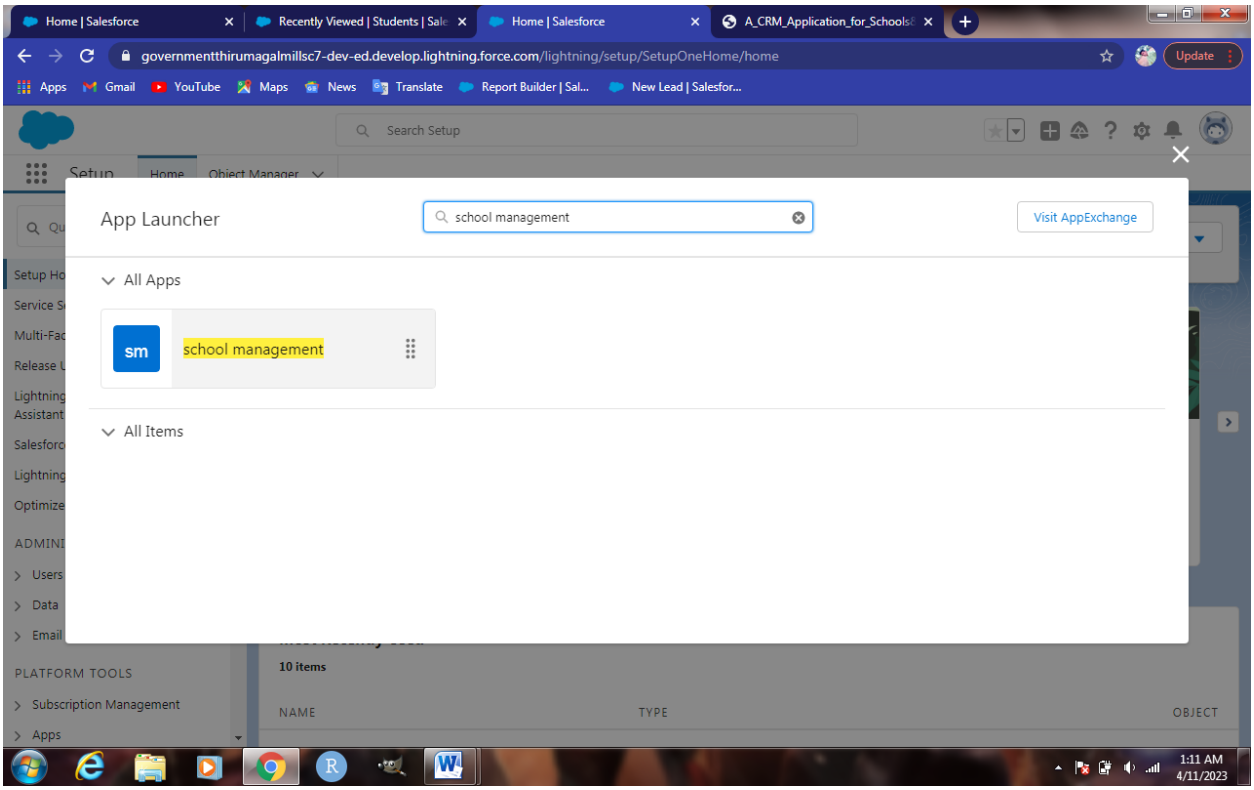
Milestone-2:Lightning App

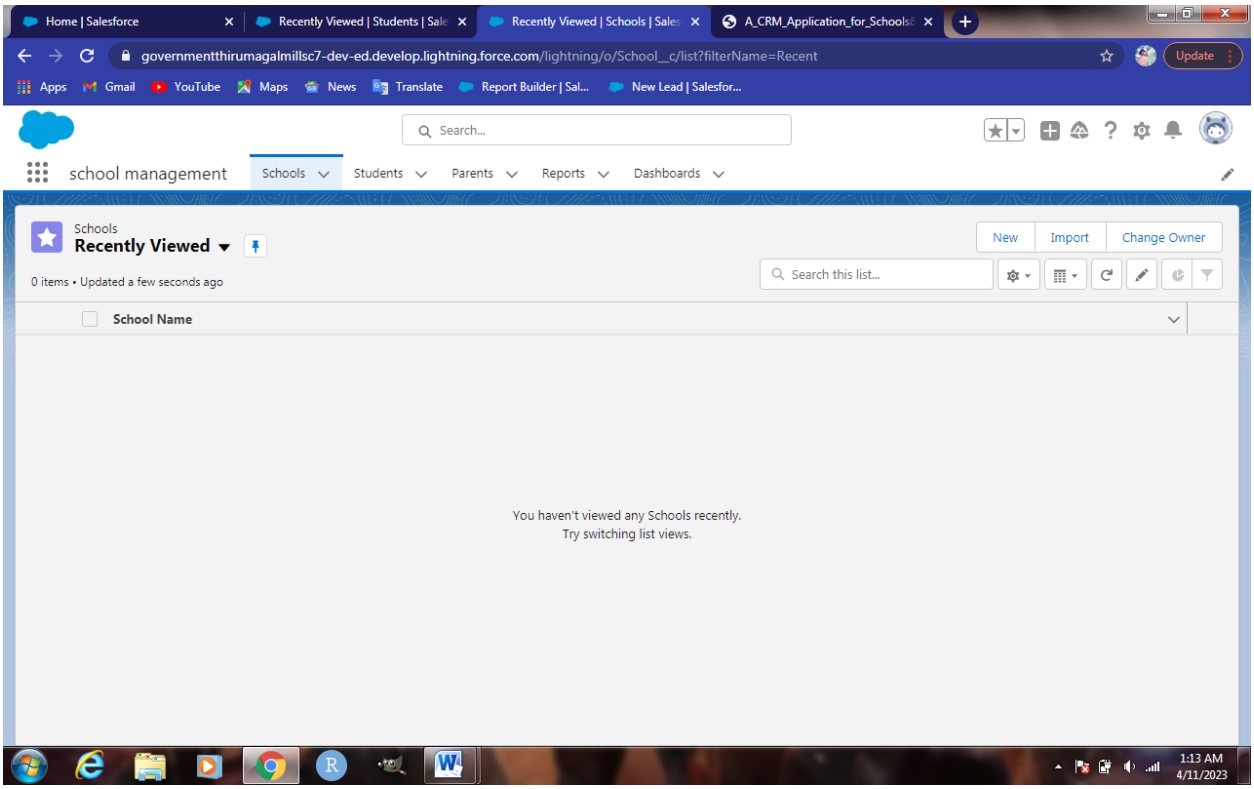
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs

Activity:

Create the School Management app







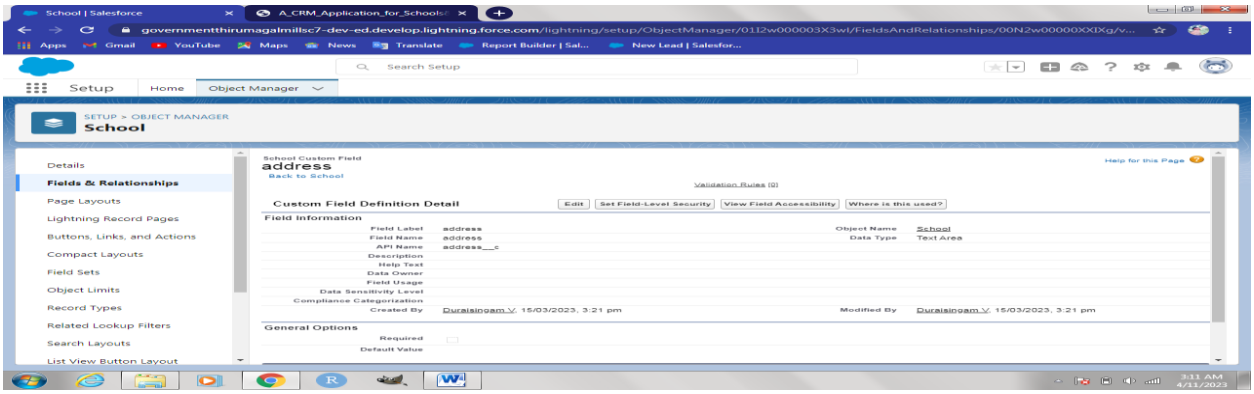
Milestone -3:Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

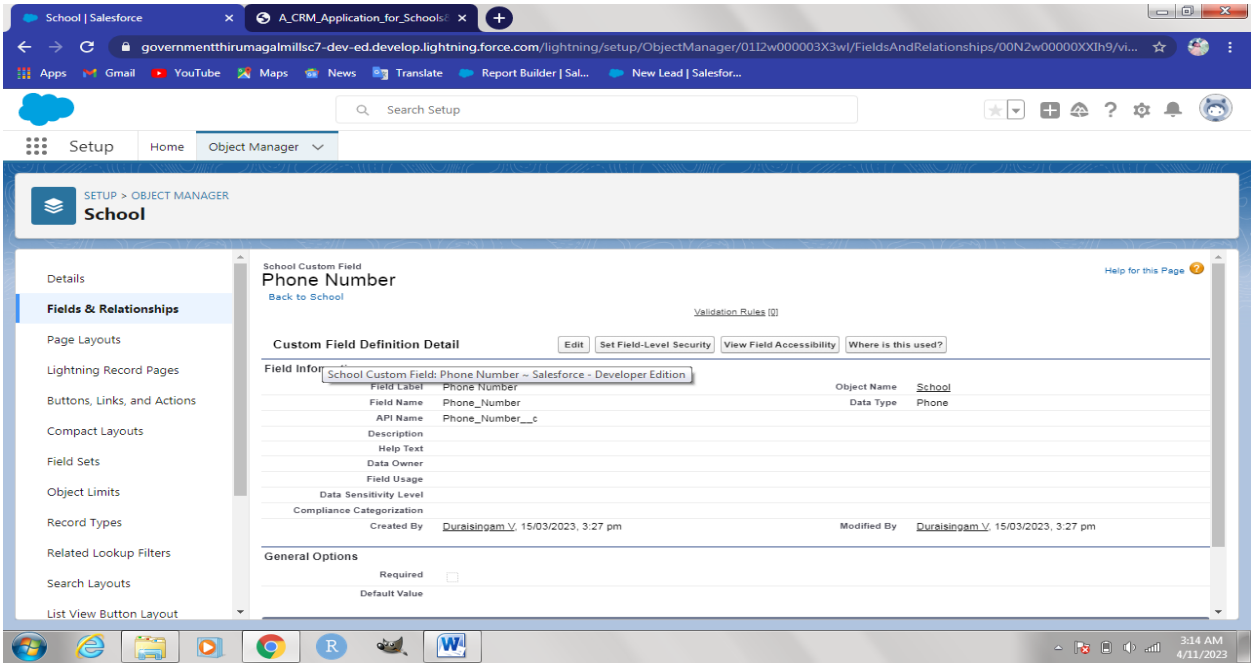
Activity-1:

Creation of fields for the School objects:

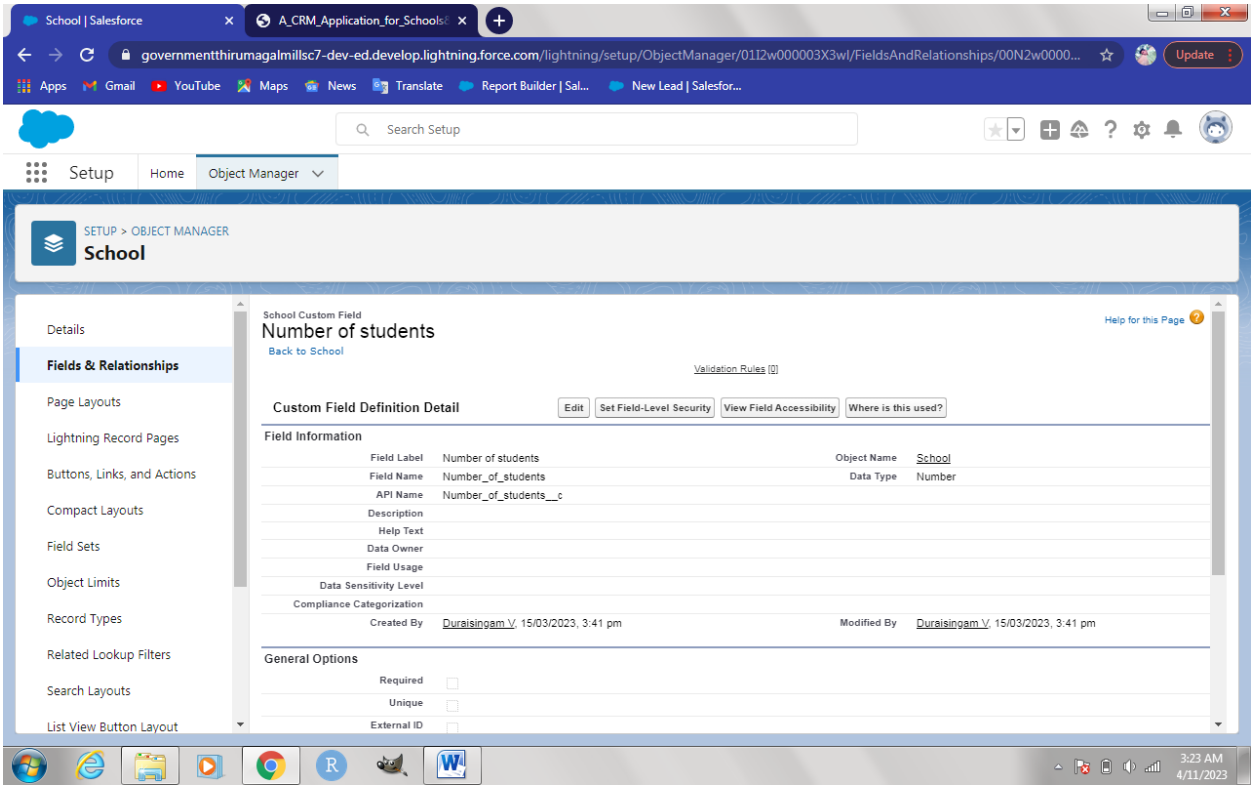
Address:



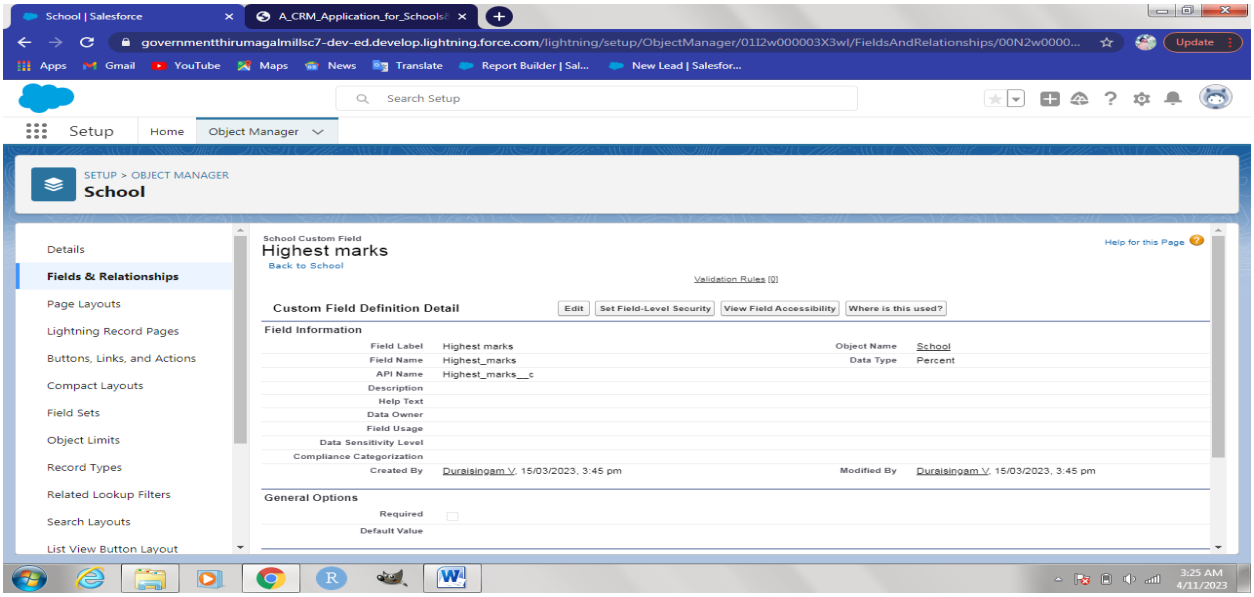
Phone Number



Number of students:



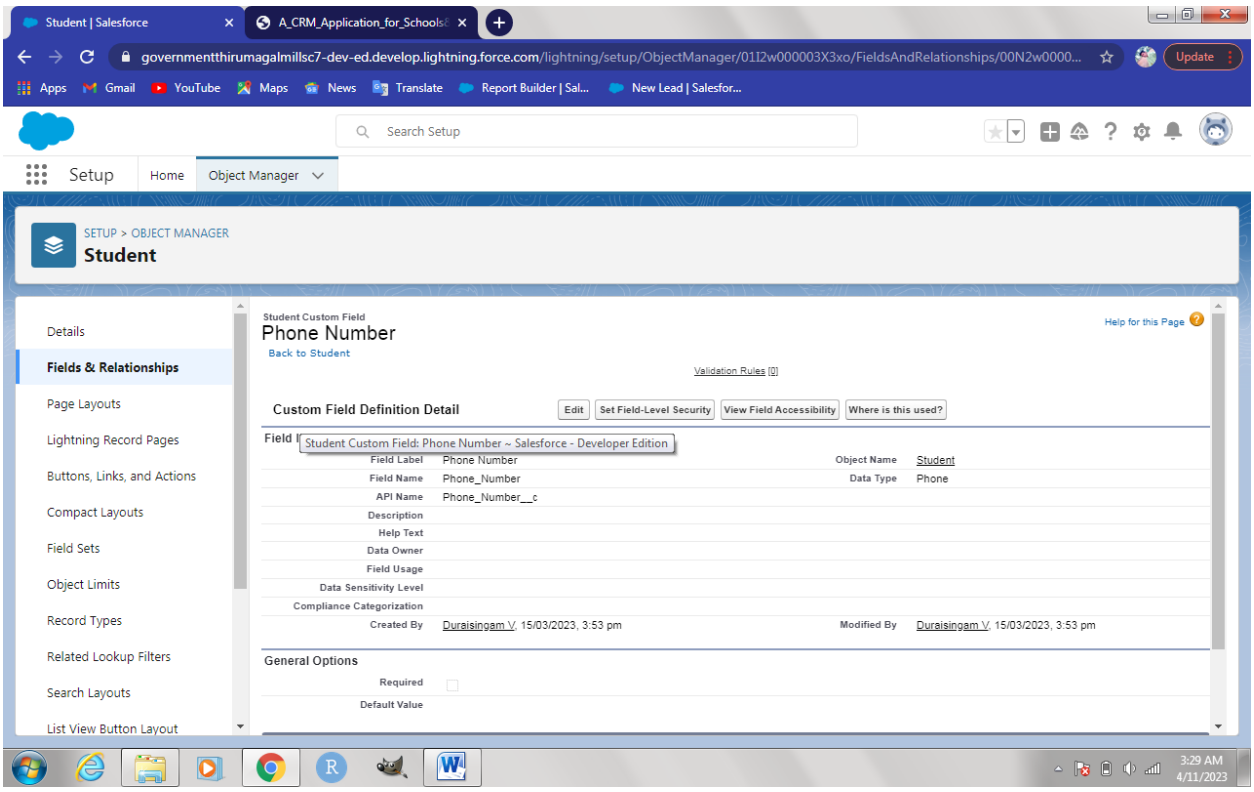
Highest Marks:



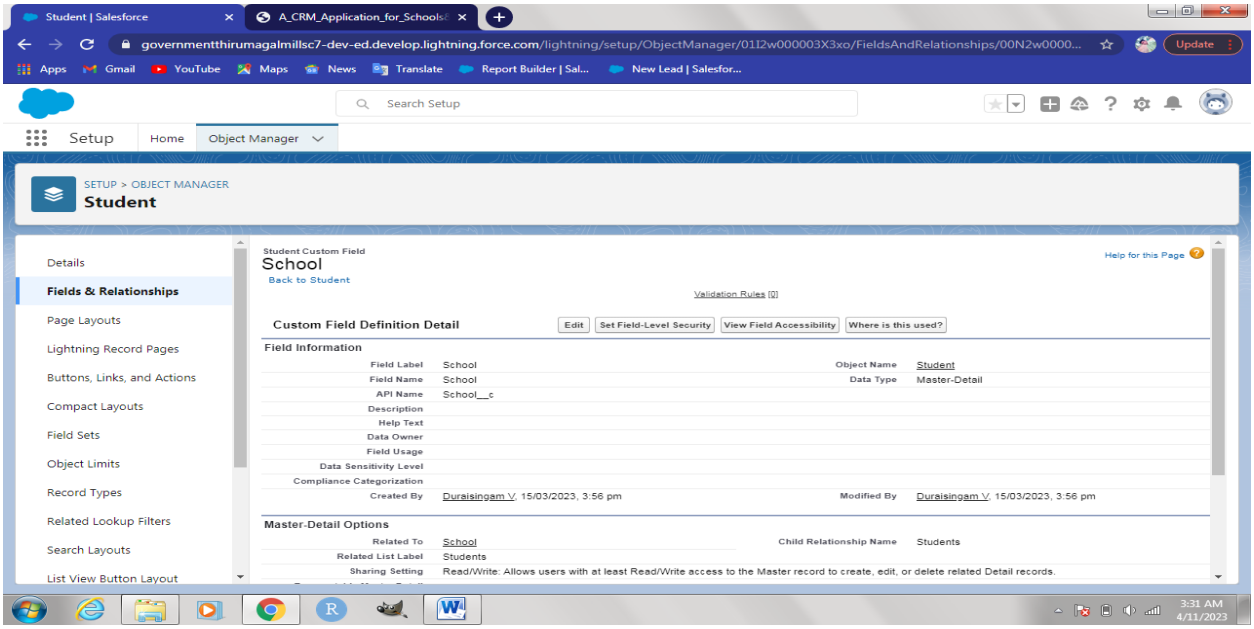
Activity-2:

Creation of fields for the Student objects:

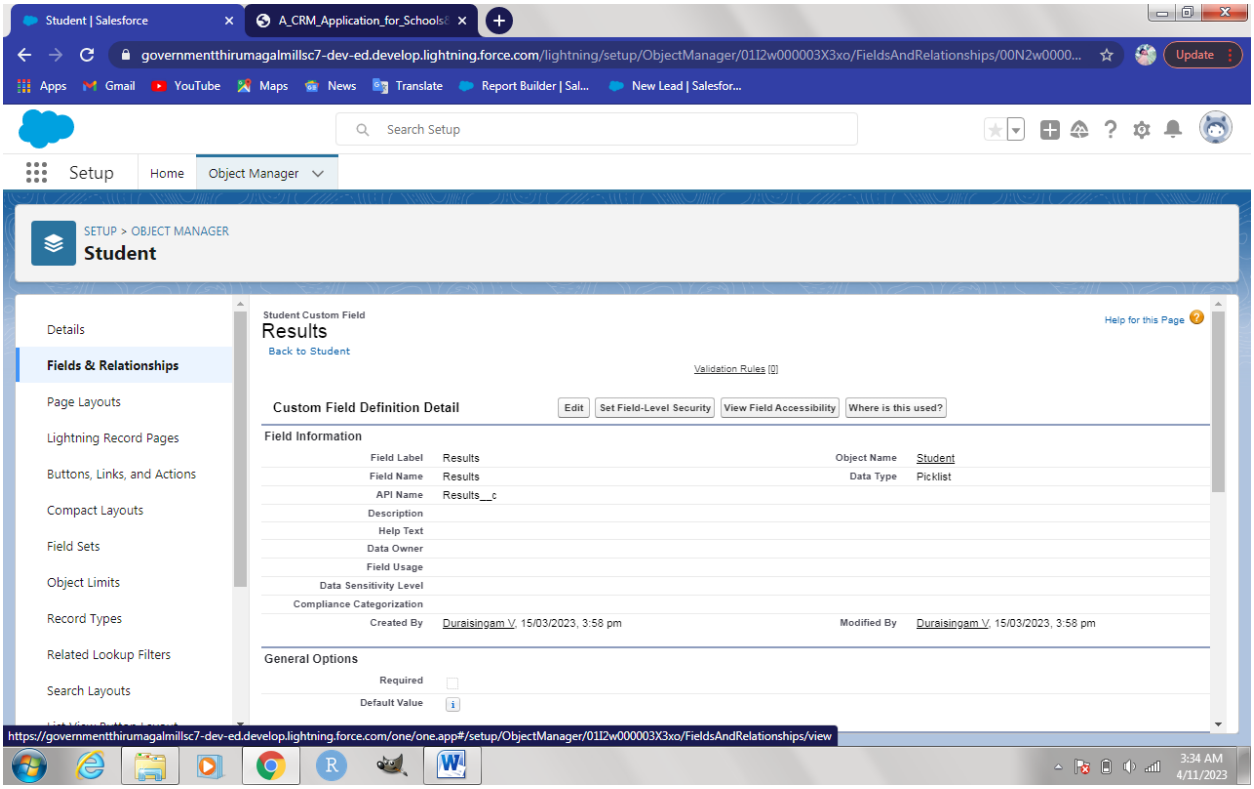
Phone number:



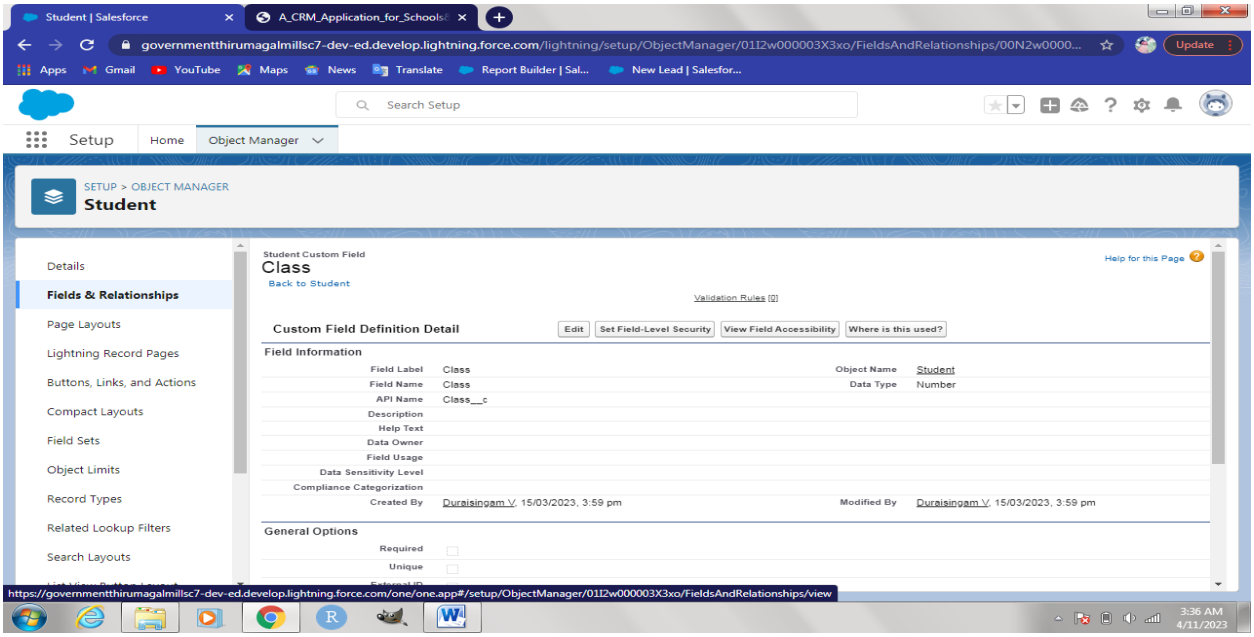
School:



Results:



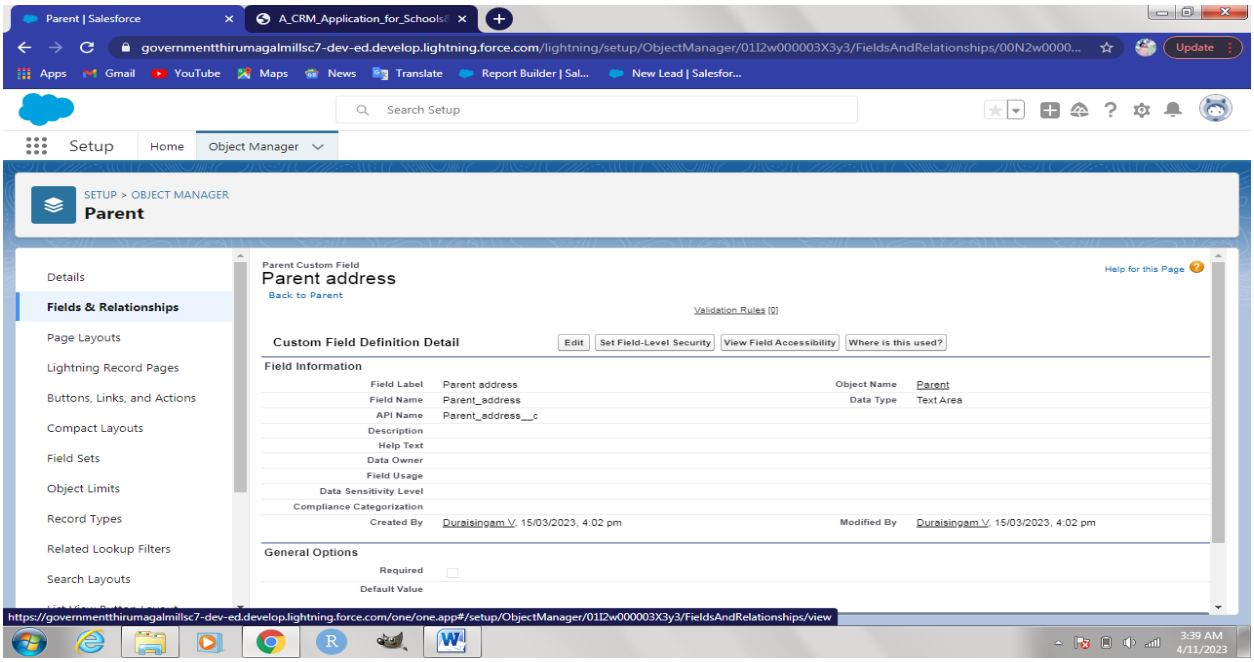
Class:



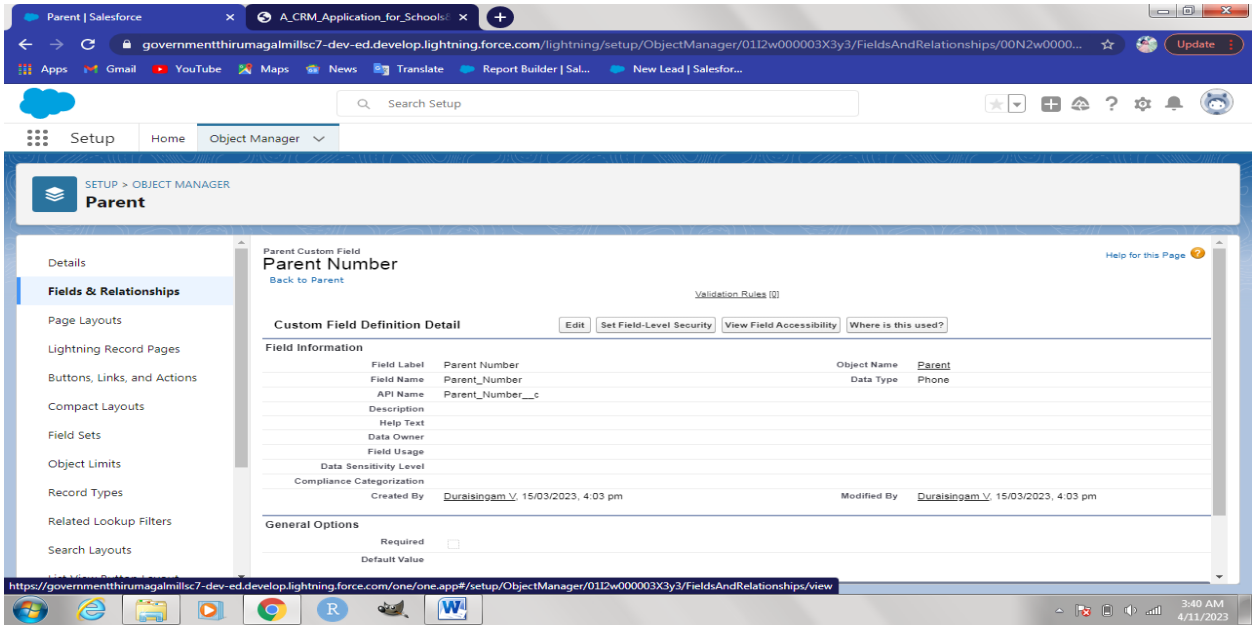
Activity-3:

Creation of fields for the Parent objects:

Parent Address:



Parent Number:

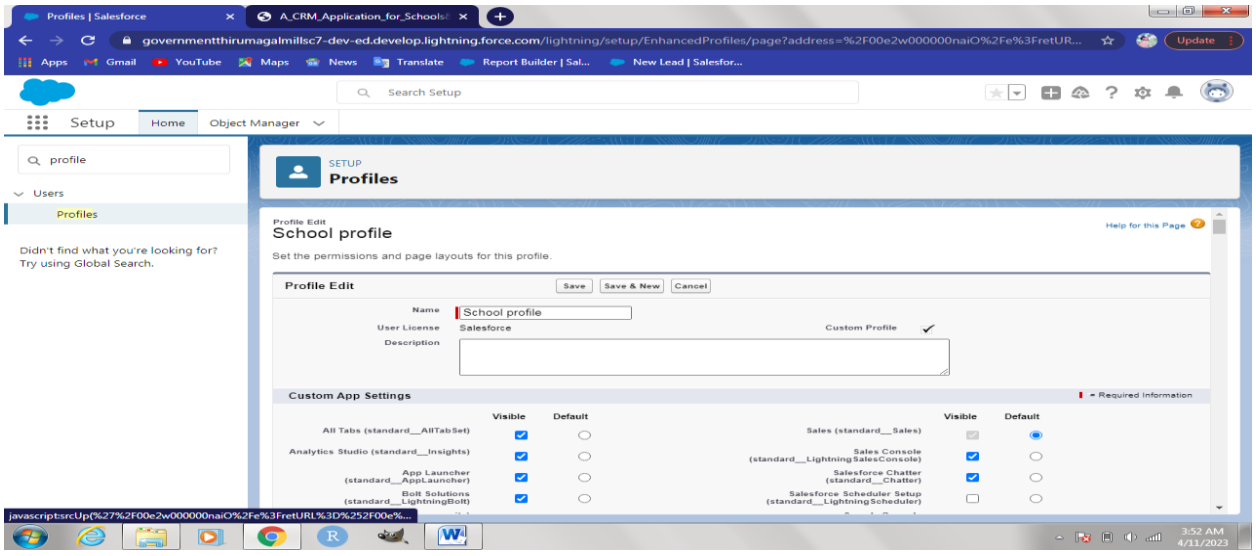


Milestone-4: Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges

Activity:

Creation on profile:

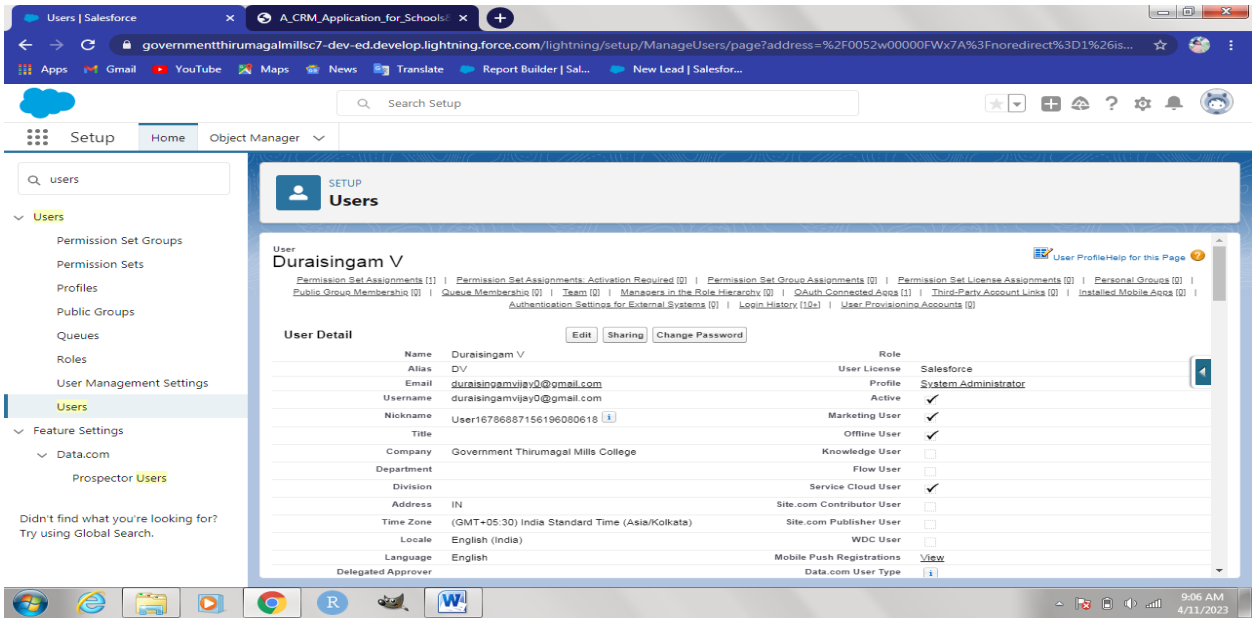


Milestone-5: Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity:

Creating a Users:

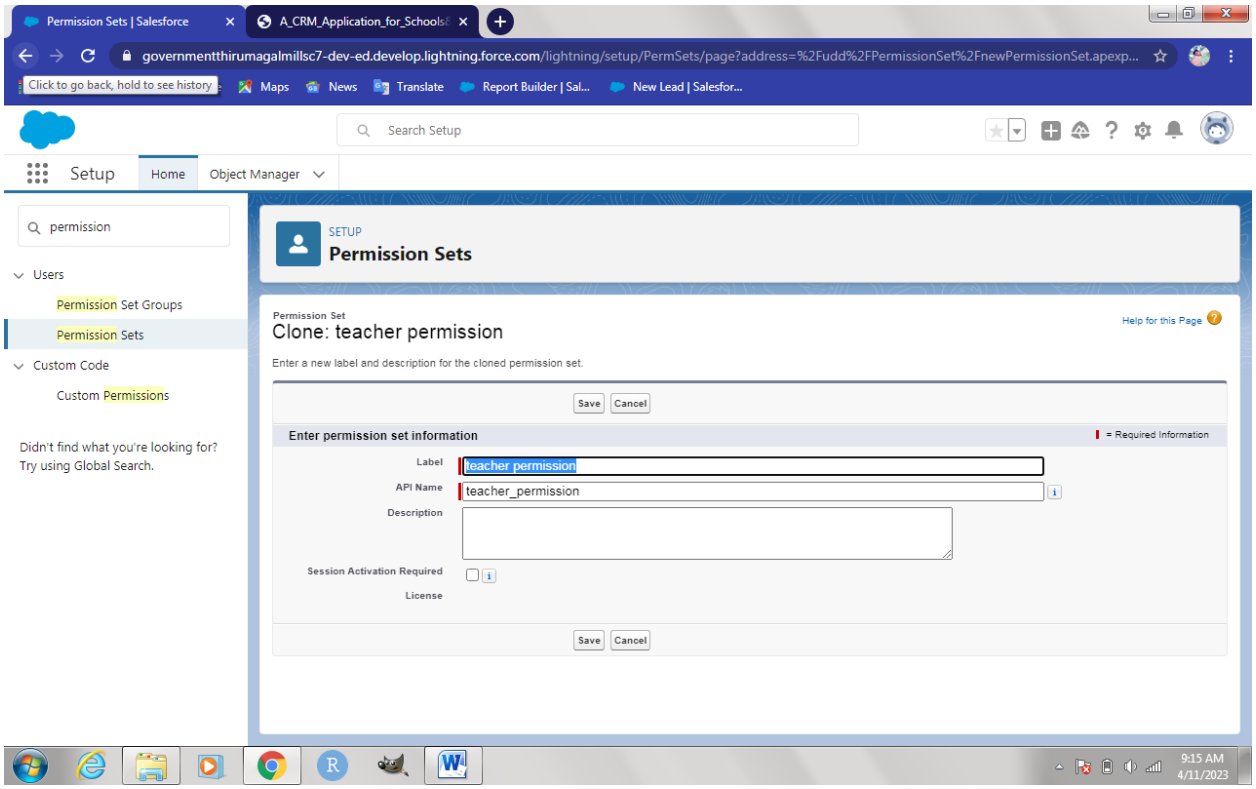


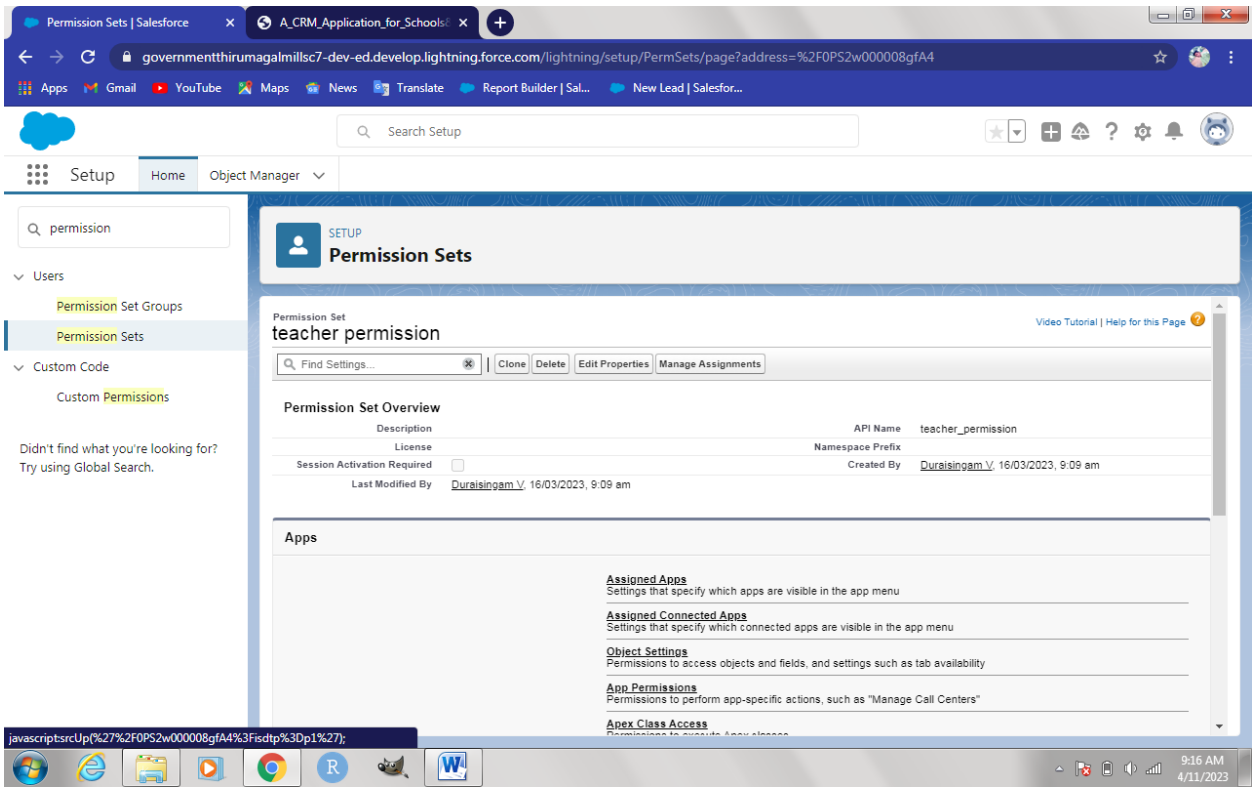
Milestone-6:Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Activity-1:

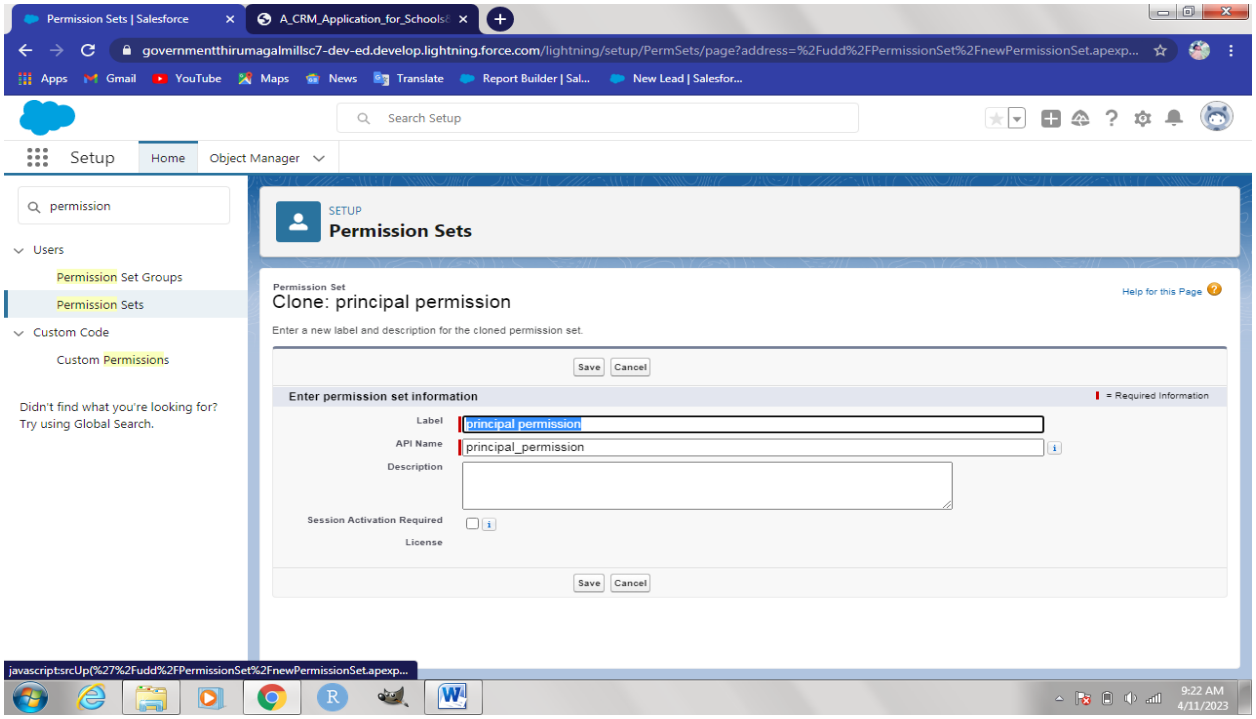
Permission sets 1:

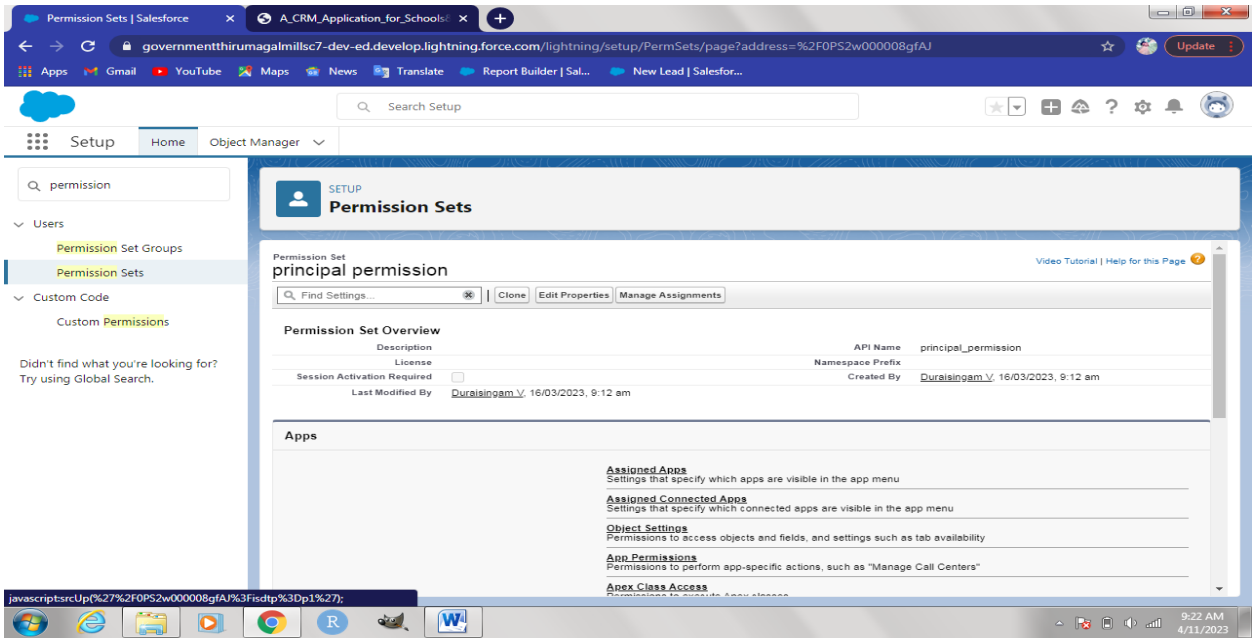

Permission Sets | Salesforce
A_CRM_Application_for_Schools
governmentthirumagalmillsc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp...
Click to go back, hold to see history
Maps
News
Translate
Report Builder | Sal...
New Lead | Salesfor...
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
Clone: teacher permission
Help for this Page
Enter a new label and description for the cloned permission set.
Save
Cancel
Enter permission set information
= Required Information
Label
teacher permission
API Name
teacher_permission
Description
Session Activation Required
License
Save
Cancel
9:15 AM
4/11/2023


Permission Sets | Salesforce
A_CRM_Application_for_Schools
governmentthirumagalmillsc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000008gfA4
Apps
Gmail
YouTube
Maps
News
Translate
Report Builder | Sal...
New Lead | Salesfor...
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
teacher permission
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
Duraisingam V, 16/03/2023, 9:09 am
API Name
teacher_permission
Namespace Prefix
Created By
Duraisingam V, 16/03/2023, 9:09 am
Apps
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
javascript:srcUp(%27%2F0PS2w000008gfA4%3Fisdtp%3Dp1%27);
9:16 AM
4/11/2023

Activity-2:

Permission sets 2:



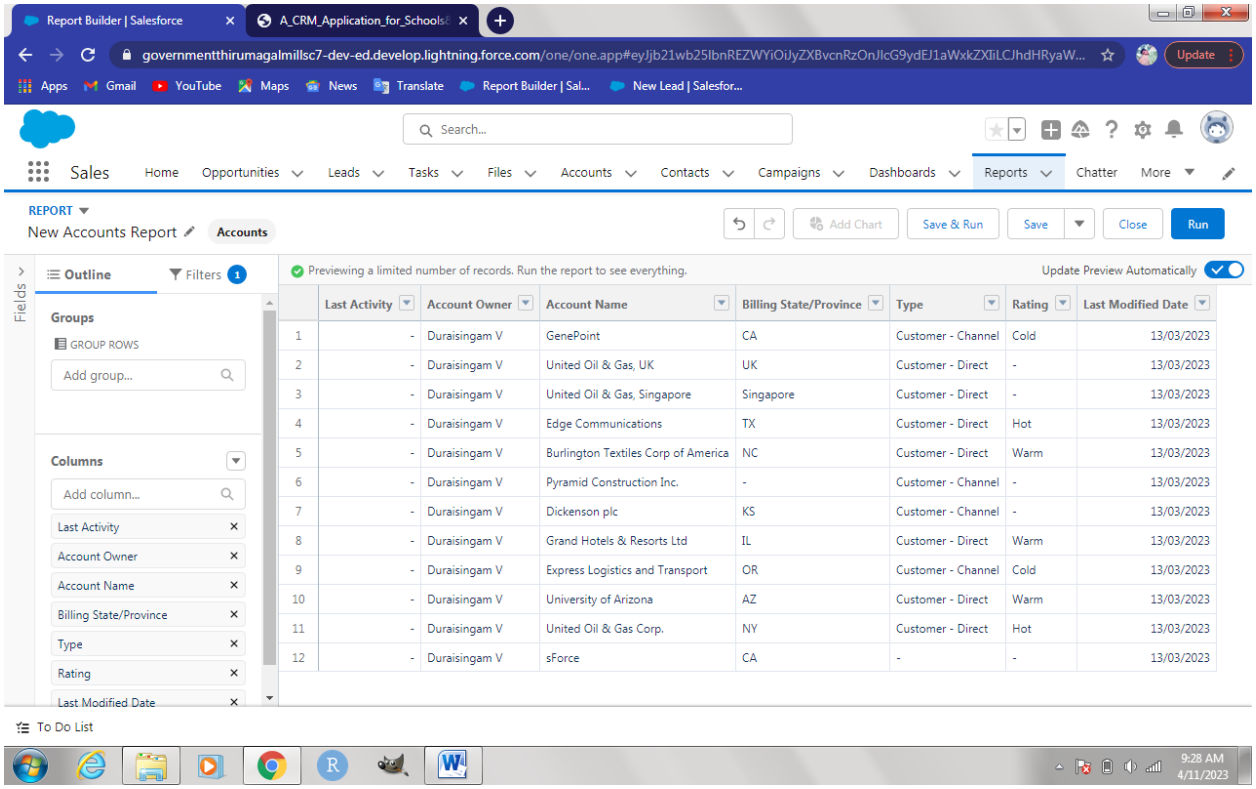


Milestone-7:Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

Reports :



	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Duraisingam V	GenePoint	CA	Customer - Channel	Cold	13/03/2023
2	-	Duraisingam V	United Oil & Gas, UK	UK	Customer - Direct	-	13/03/2023
3	-	Duraisingam V	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	13/03/2023
4	-	Duraisingam V	Edge Communications	TX	Customer - Direct	Hot	13/03/2023
5	-	Duraisingam V	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	13/03/2023
6	-	Duraisingam V	Pyramid Construction Inc.	-	Customer - Channel	-	13/03/2023
7	-	Duraisingam V	Dickenson plc	KS	Customer - Channel	-	13/03/2023
8	-	Duraisingam V	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	13/03/2023
9	-	Duraisingam V	Express Logistics and Transport	OR	Customer - Channel	Cold	13/03/2023
10	-	Duraisingam V	University of Arizona	AZ	Customer - Direct	Warm	13/03/2023
11	-	Duraisingam V	United Oil & Gas Corp.	NY	Customer - Direct	Hot	13/03/2023
12	-	Duraisingam V	sForce	CA	-	-	13/03/2023

4 Trailhead profile public URL

Team Lead - https://trailblazer.me/id/strailhead

Team Member 1 – https://trailblazer.me/id/strailhead

Team Member 2 – https://trailblazer.me/id/strailhead

Team Member 3 – https://trailblazer.me/id/strailhead

5 ADVANTAGES & DISADVANTAGES

Advantages:

- **Better Knowledge of Customers:** Customer Relationship Management is a customer-centric technique. The main focus of CRM technique is on the customers of Business. It helps businesses to acquire all required information of customers. This information is then stored and used for understanding customer behavior.

- **Retain More Customers:** It not only focuses on understanding and serving the existing customers of businesses. CRM aims at acquiring more and more customers for businesses. It targets to increase the customer base & retain them for the long term. Through CRM, a communication channel is developed between customers and business which acquires all information regarding customers.

Disadvantage:

- **Costly:** Implementation of CRM system requires huge cost to be spent by the business. CRM software are too costly as it came with different price packages as per the needs of organizations. It increases the overall expenses of business and may not be suitable for small businesses.

- **Security Issues:** Another major drawback with CRM is the insecurity of data collected and stored. All of the data collected is stored at one centralized location which has a threat of being lost or hacked by someone. Employees may add inaccurate data or manipulate figures leading to wrongful planning.

- **Third Party Access:** CRM data can be obtained and misused by other parties. There have been many cases where web hosting companies take and sells CRM data to the third party. Various sensitive

data about customers may get into the wrong hands and cause loss to peoples.

6 APPLICATIONS

Salesforces to the platform developed application to solution applied areas in business logic to travel app using solution or formulas .

7 CONCLUSION

The project over all view to develop in the application on the salesforce in customer success platform and designed. Then use of object and field work on the salesforce developed in application of travel approval build on employee traveling using on dencinetion to other work space moving useful the application.

8 FUTURE SCOPE

The developer salesforce in the travel approval application developing in employee easy to convinced that the future change on advanced future put in application.