A CRM APPLICATION FOR SCHOOL/COLLEGES

1 INTRODUCTION

1.1 Overview

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?"

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.
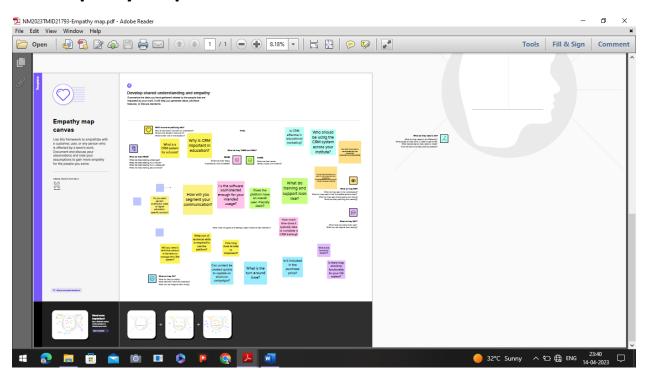
1.2 Purpose

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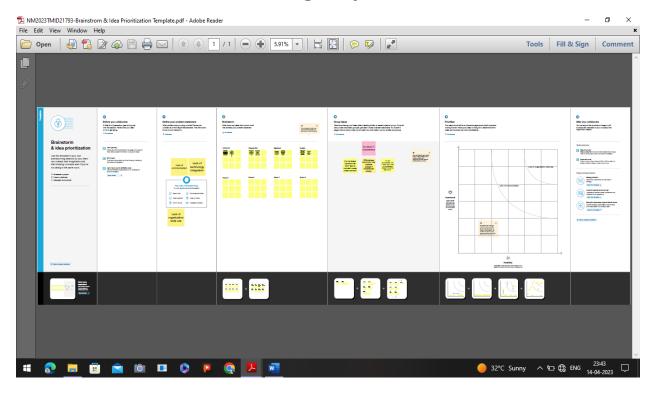
modified based on the requirements.

- Real Time Salesforce Project
- Object & Relationship in Salesforce
- Profile
- Users
- Reports
- 6.Permission sets
- 7.Reports

2 Problem definition & Design Thinking

2.1 Empathy Map

2.2 Ideation & Brainstorming Map

3 Result

3.1 Data Model:

Object name	Fields in the object	
Creation of school objects	Field Label	**Data Type**
	School	Allow reports
Create student object	**Field Label**	**Data Type**
	Student	Allow reports

Create parent object	Field Label	Data Type
	Parent	Allow reprts

3.2 Activity & Screenshot

Activity-1: Creation of School Object
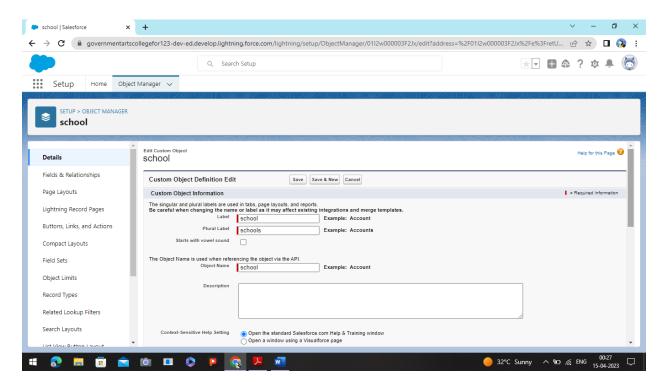
Creation of Objects for School Management:

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.
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.

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.

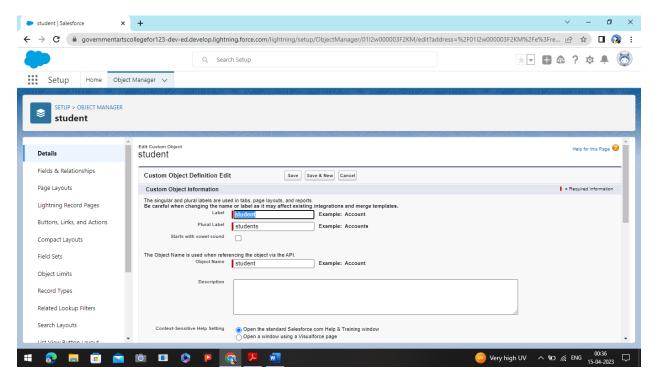● On the Custom Object Definition page, create the object as follows:

● 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
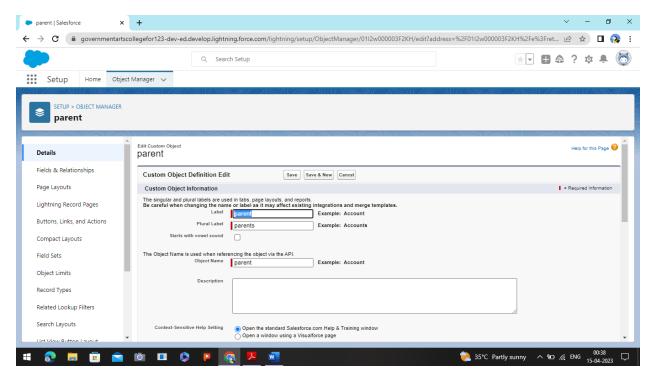● Record Name: Parent Name
● Check the Allow Reports checkbox
● Check the Allow Search checkbox
● Click Save.
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
Under Custom Object Tabs, click New.
1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

Milestone-3: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
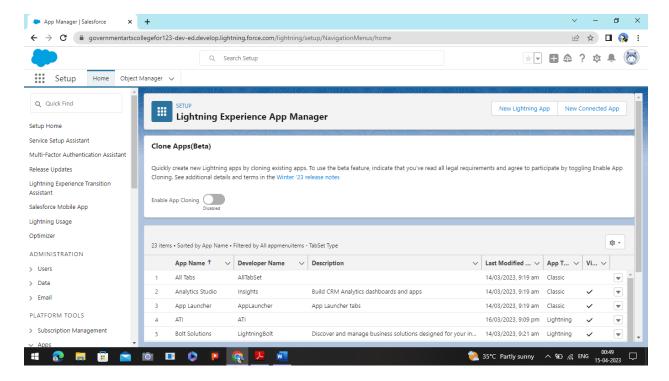
Activity:

Create the School Management app

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

● 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.

● From Available Profiles, select System Administrator and move it to Selected Profiles.

Click Save & Finish.

Milestone -4:Fields and Relationship

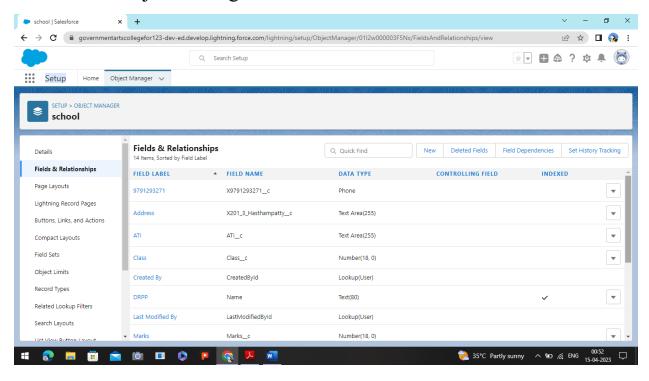An object relationship in Salesforce is **a two-way association between two objects**.

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:

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

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.
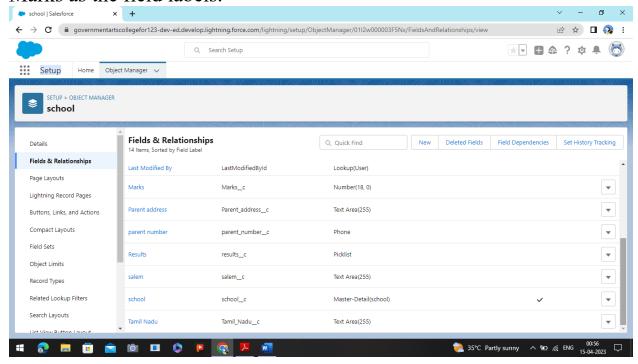3. Click Next.
4. For Field Label, enter School.

5. Click Next, Next, Next and Save.

Lets 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

Lets 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

Milestone-5: 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,
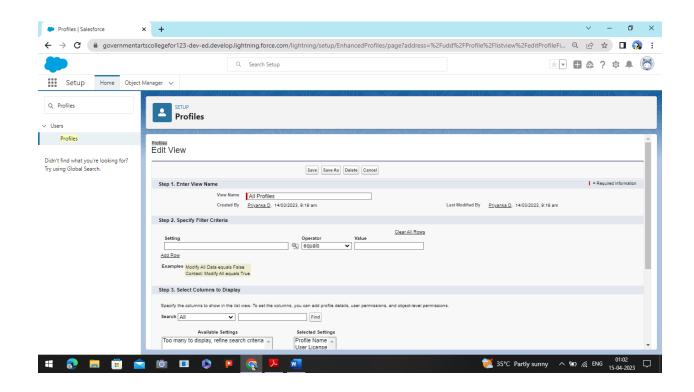Login hours & Login IP ranges

Activity:

Creation on profile:

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.
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

Milestone-6: 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

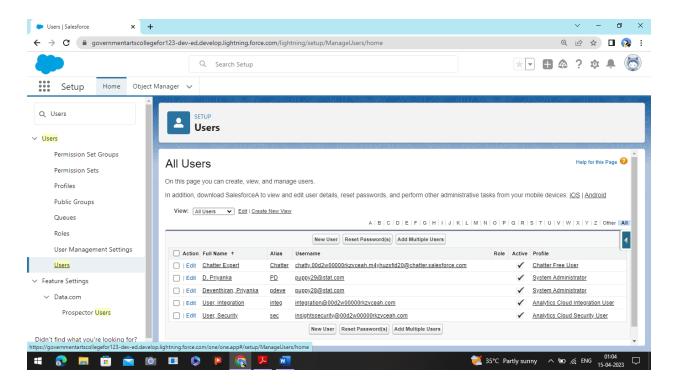Salesforce has a user account.

Activity:

Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.

2. Click New 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.

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

Milestone-7: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:

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 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

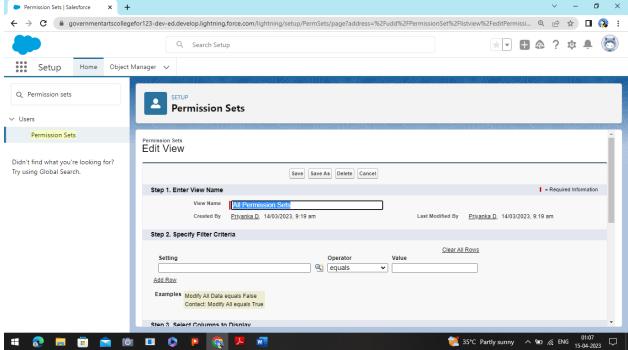Similarly follow the above steps for the permission set 2.
Activity-2:
Permission sets 2:
1. From Setup, enter Permission Sets in the Quick Find box, then select
Permission Sets.
2. Click New.
3. GIve the name of the Permission set name as Principal permission and
then under the
object settings give all permissions for the custom objects and assign
them to the
Principal user.

Milestone-8: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 :

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.

4   Traihead Profile Public URL

Team lead-https://trailblazer.me/id/priyad41

Team Member1-https://trailblazer.me/id/pnandhu3

Team Member 2-https://trailblazer.me/id/rajem15

Team Member 3-https://trailblazer.me/id/dsakthi9

5   ADVANTAGES AND DISADVANTAGES

1. Beneficial for the different departments or teams of the business

Customer relationship management automation systems can benefit small and large businesses and their teams, such as marketing, sales, customer service, field service, and project service automation teams in different aspects. Together they raise the business's growth chart by increasing the product's productivity. With this, CRM is capable of improving and simplifying complex customer engagement.

2. Customers are engaged across multiple channel

There are various advantages of using a CRM system for a business as it provides the best possible customer service by improving customer service, customer retention, tracking customer data, streamlining operations, reducing costs, and taking the business to the next level. The CRM can engage the user with its customer across multiple channels like email, social media, live chat, and phone. You can connect with your customer on any platform and track customer interaction in one place, which helps get a complete picture of each customer.

3. Provide streamline operations

A properly implemented CRM in business provides streamlined operations by automating tasks such as order fulfillment, customer contact management, and lead tracking. Streamlining the functioning of CRM operations helps focus on more strategic activities for the business and saves money and time.

4. Improve customer service

Customer relationship service is designed to interact with customers and store their data in one place. It helps in maintaining good customer relationships and gives customer satisfaction. With the help of CRM, the customer service team can listen to customers' problems and resolve them quickly and efficiently. With this, teams can contact every customer to offer assistance before problems arise.

6 APPLICATION

Tracking Customers

A good CRM helps you understand your market and the needs of your customers. As you attract more customers, a CRM makes two things clear: *who* is interested in what you have to offer, and *what* is most important to them.

When it comes to winning more customers, a CRM helps you make smarter decisions than your competition and offer people what they truly want. And if customers leave or your sales stagnate, you can see common threads and change the process accordingly, to better meet their needs and retain them.

Collecting Data for Marketing

When you're working in spreadsheets and scrolling through email chains, it's hard to get a big picture of all the important data about current and future customers. **A CRM saves important data in extensive customer and contact lists.**

This makes it easy and efficient to market directly to them based on particular criteria.

Improving Interactions and Communications

When your list of customers is short, it's easy to keep up with everyone. However, as your business grows and that list becomes longer, it's more likely that sales opportunities and current customers may fall through the cracks.

7   CONCLUSION

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty. However, in order to be successful in these aims, the different company departments have to work together and use measures in a coordinated fashion. This purpose is achieved via a customer database which is analyzed and updated using CRM software.

This approach will be of particular interest to companies operating in highly competitive markets where it is difficult to attract new customers.

8 FUTURE SCOPE

"[The future of CRM] is about which **companies will be able to pivot to meet the changing needs and trends — driven by customer expectations**. Customers expect organizations to know a lot about them and expect to have conversations.