

# A CRM APPLICATION FOR SCHOOLS /COLLEGES

## 1. INTRODUCTION

### OVER VIEW:

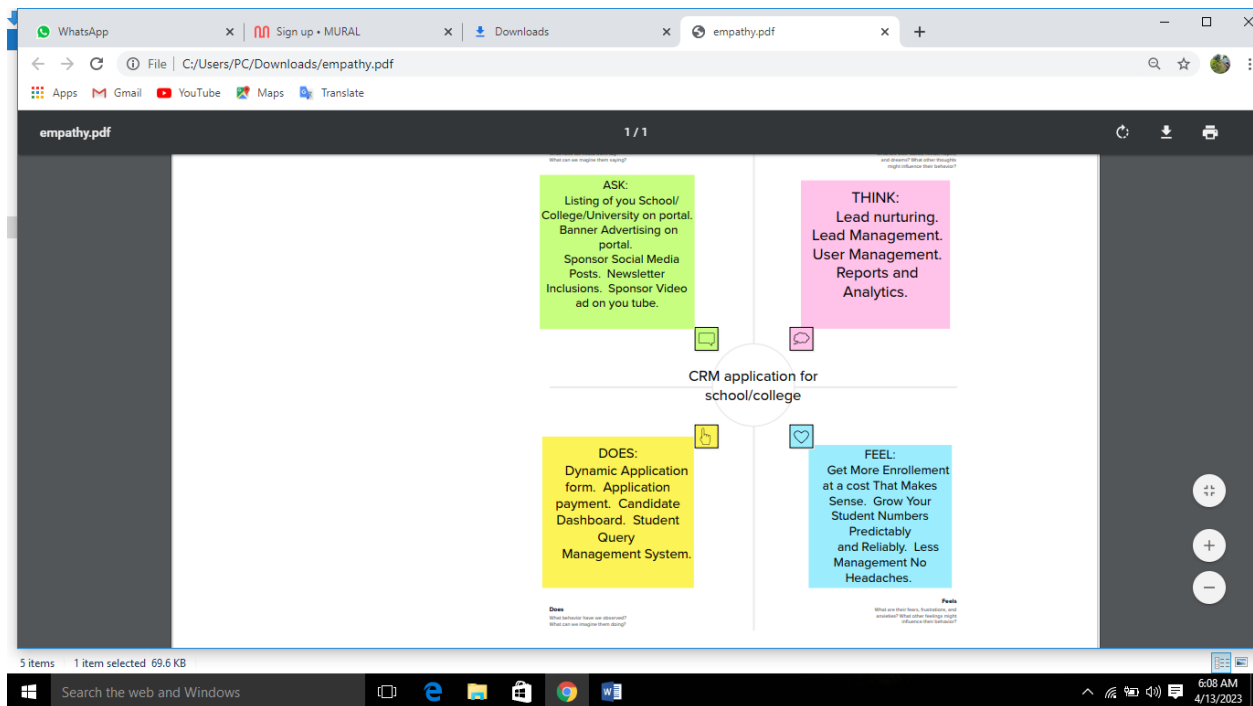
This Project helps you to maintain and manage the school related problems which further can be modified based on the requirements.

### PURPOSE:

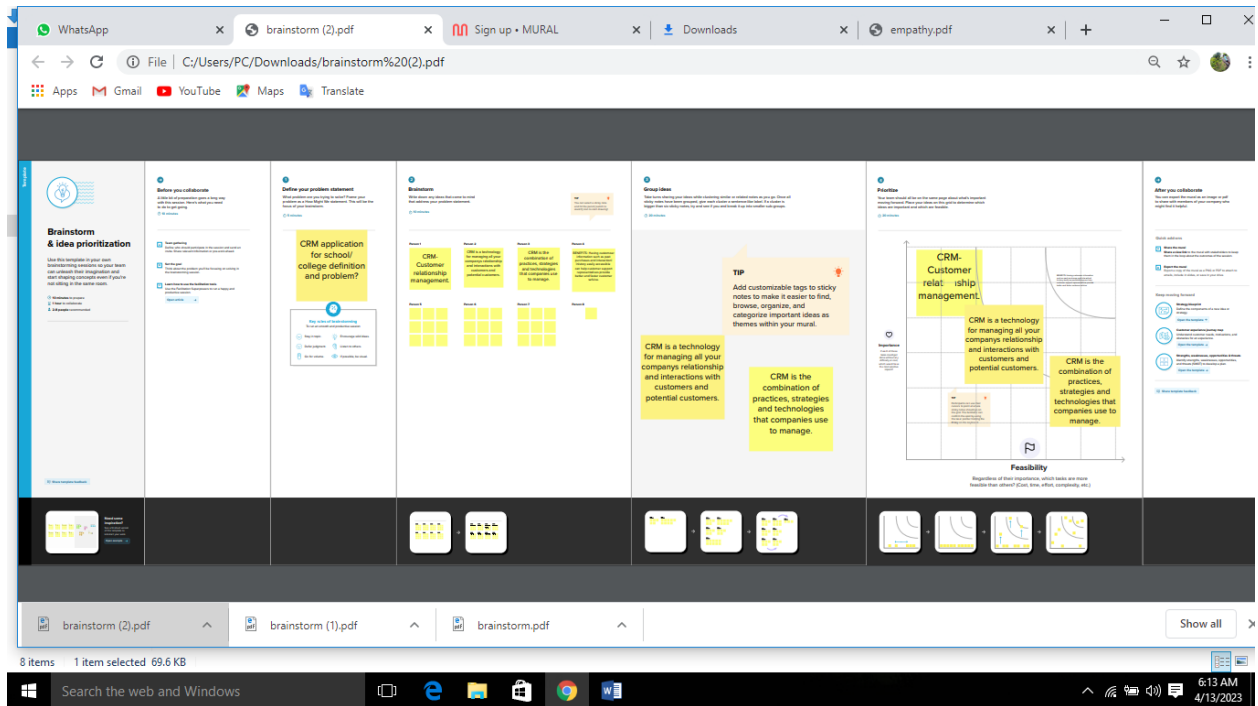
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### Empathy map:



## Ideation & Brainstorming Map:



## 3. RESULTS

### Data Model:

Object Name	Fields in the Object
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Obj 1		
	<b>Field Label</b>	<b>Data type</b>
	School	School Name
	Parent	Parent Name
	Student	Student Name

## Activity & Screenshot

### 1. Object

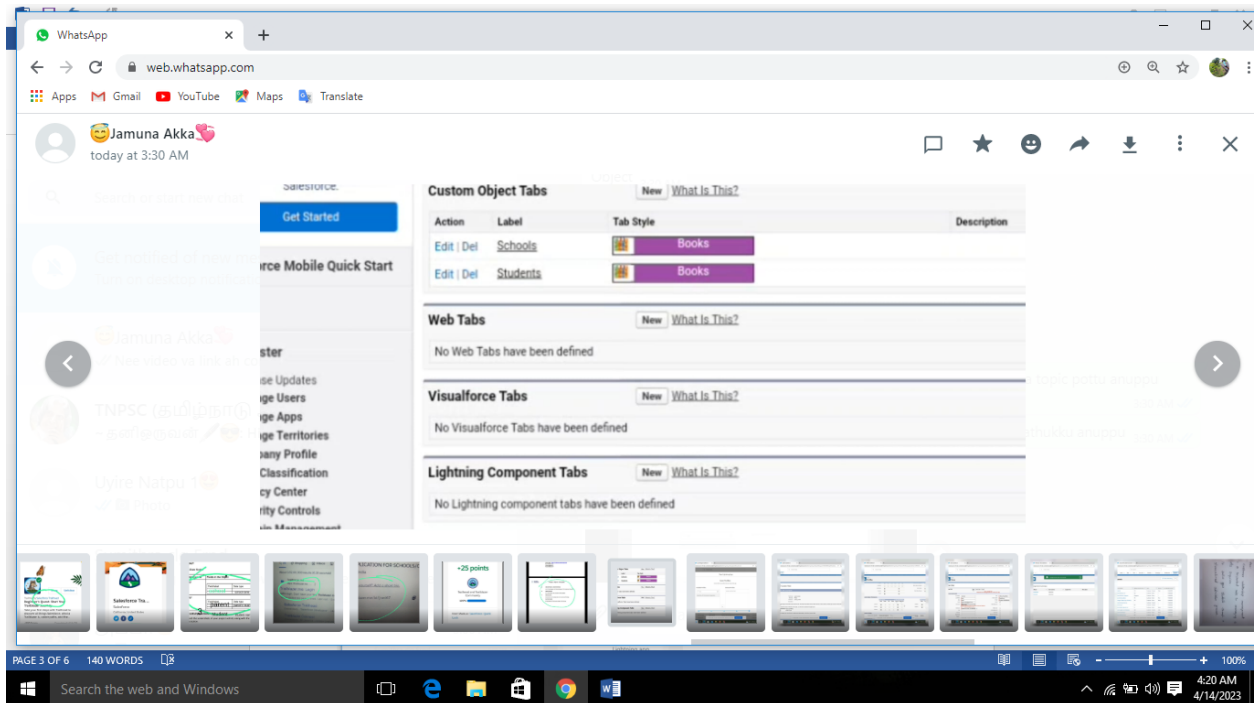
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

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

Click on the object manager tab just beside the home tab. 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.



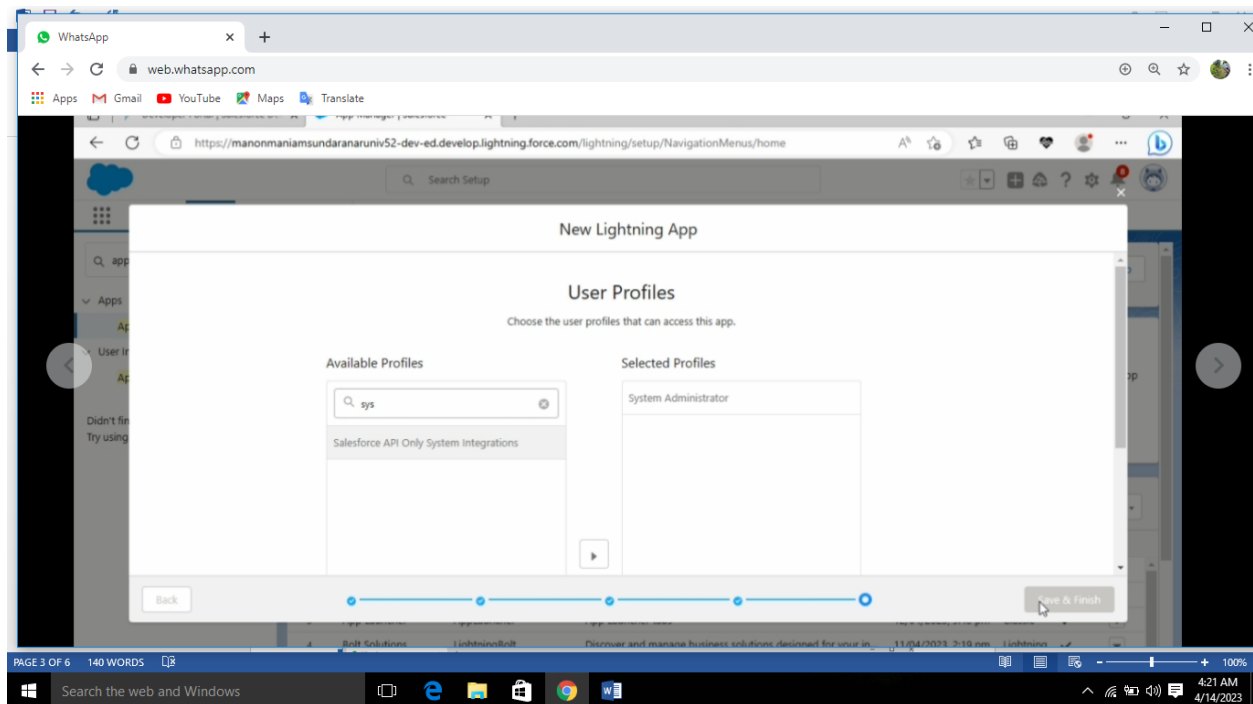
## 2. Lightning App

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.

### Create the School Management app:

- From Setup, enter App Manager in the Quick Find and select App Manager.
  - Click New Lightning App. Enter School Management as the App Name, then click Next
- 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.

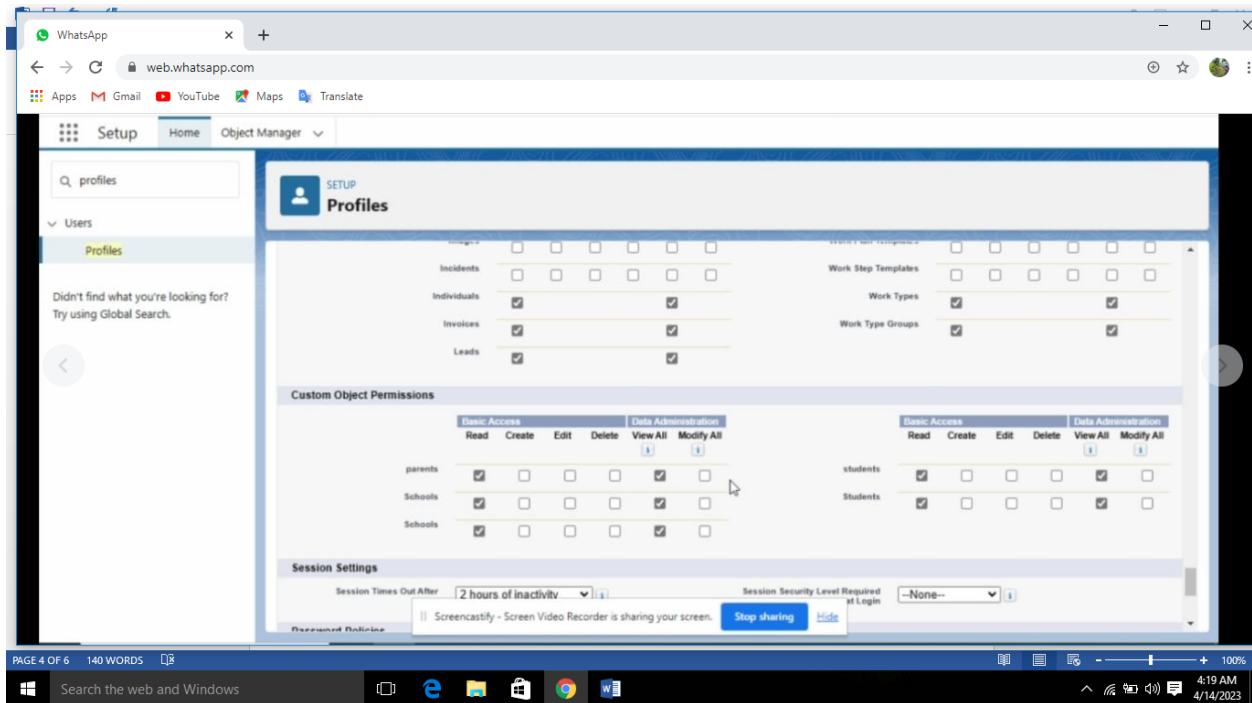


### 3. Profiles

#### Creation on profile:

From Setup enter Profiles in the Quick Find box, and select Profiles.

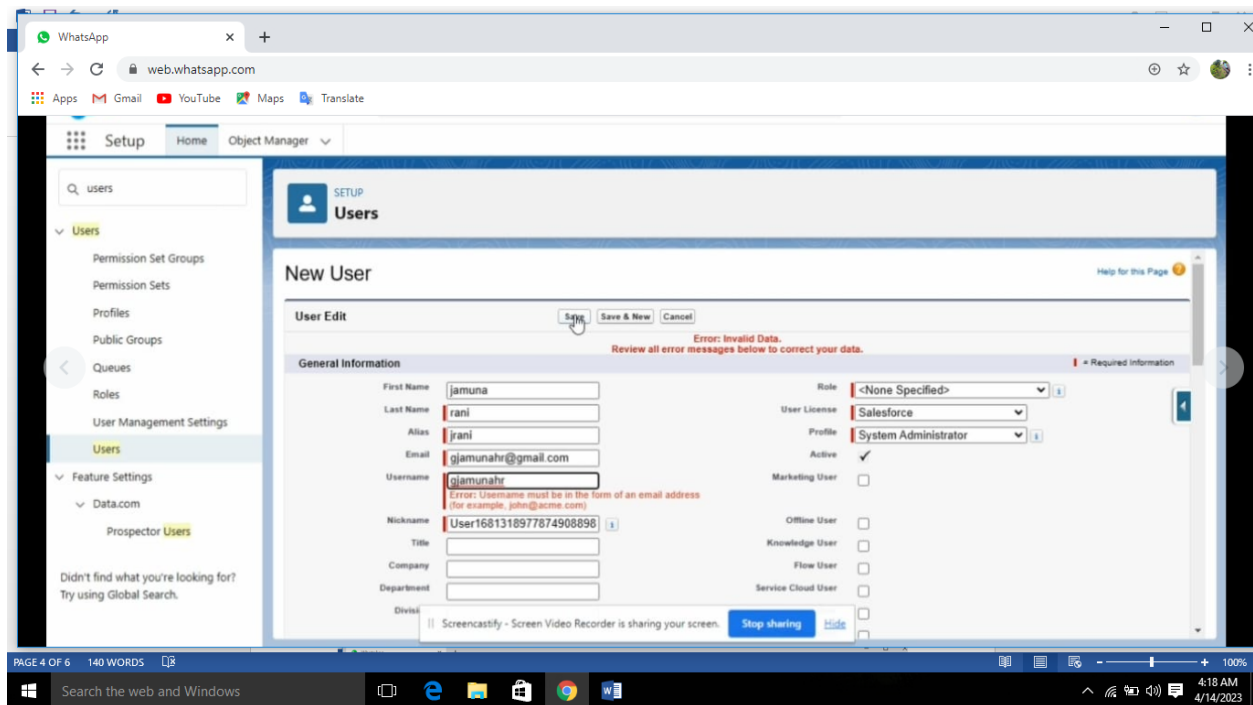
1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter School profile.
4. Click Save.
5. While still on the School profile page, then click Edit.
6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile.



## 4. Users

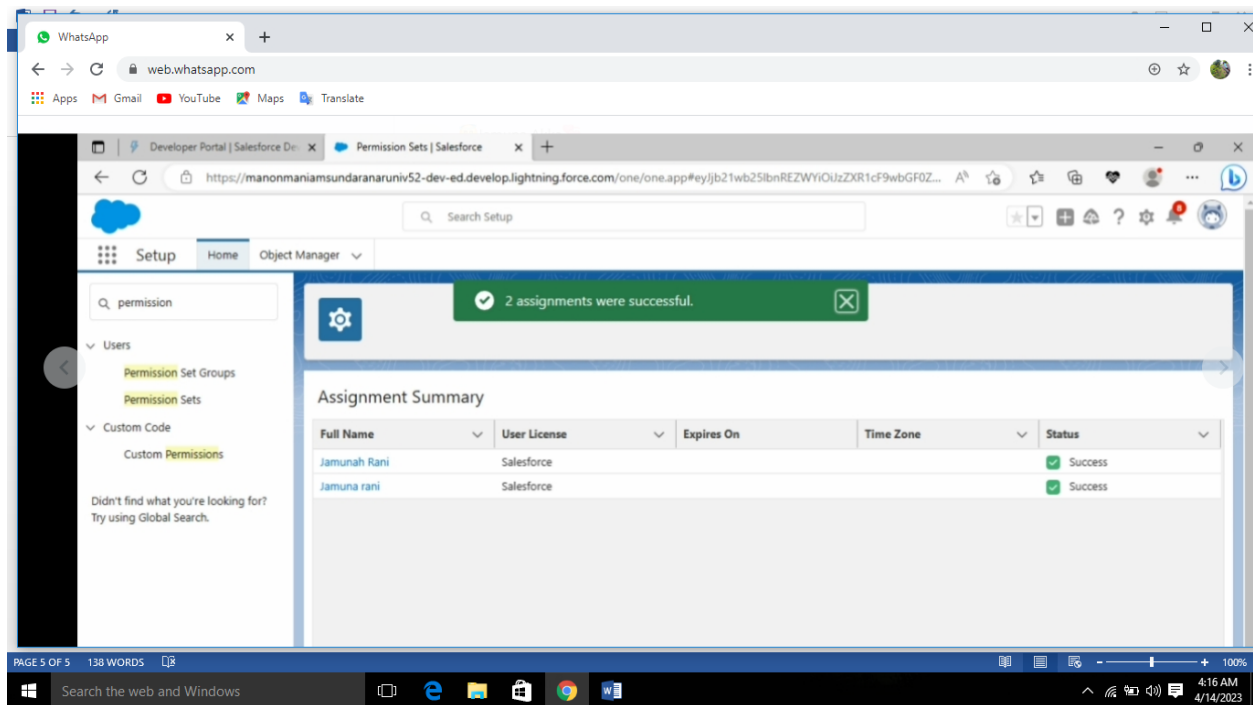
### Creating a Users:

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.



## 5. Permission Set

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.



## 6. Report

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.



WhatsApp

web.whatsapp.com

Apps Gmail YouTube Maps Translate

Report: Accounts  
school with students and parents

Enable Field Editing

Add Chart

Edit

Total Records  
12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Jamunah Rani	GenePoint	CA	Customer - Channel	Cold	11/04/2023
2	-	Jamunah Rani	United Oil & Gas, UK	UK	Customer - Direct	-	11/04/2023
3	-	Jamunah Rani	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	11/04/2023
4	-	Jamunah Rani	Edge Communications	TX	Customer - Direct	Hot	11/04/2023
5	-	Jamunah Rani	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	11/04/2023
6	-	Jamunah Rani	Pyramid Construction Inc.	-	Customer - Channel	-	11/04/2023
7	-	Jamunah Rani	Dickenson plc	KS	Customer - Channel	-	11/04/2023
8	-	Jamunah Rani	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	11/04/2023
9	-	Jamunah Rani	Express Logistics and Transport	OR	Customer - Channel	Cold	11/04/2023
10	-	Jamunah Rani	University of Arizona	AZ	Customer - Direct	Warm	11/04/2023
11	-	Jamunah Rani	United Oil & Gas Corp.	NY	Customer - Direct	Hot	11/04/2023

To Do List

ScreenCastify - Screen Video Recorder is sharing your screen. Stop sharing Hide

26°C Mostly cloudy

12:48 13-04-2023

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Search the web and Windows

4:17 AM 4/14/2023

#### 4. TRAILHEAD PROFILE PUBLIC URL

Team Lead: <https://trailblazer.me/id/jrani67>

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

Team Member 2 - <https://trailblazer.me/id/kkarpagam2>

Team Member 3 - <https://trailblazer.me/id/kkarthik152>

#### 5. ADVANTAGES & DISADVANTAGES

##### ADVANTAGES:

1. Better Knowledge of Customer.
2. Minimize Cost.
3. Increase Business Growth.

## **DISADVANTAGES:**

1. Costly.
2. Security Issues.
3. Eliminates Human Element.

## **6. APPLICATIONS:** Sales force Application

## **7. CONCLUSION**

CRM is software.

In School/Colleges CRM used for managing detailed information about individual Student.

CRM integrates 360 degree view of the students relationship with management.

## **8. FUTURE SCOPE**

1. In the future students can also be able to upload or download notes.
2. We will see the entire system more interactive and also be able to give statistics data.