Project Report Template

A CRM APPLICATION FOR SCHOOLS/COLLEGES

1.INTRODUCTION

1.1 OVERVIEW

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

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

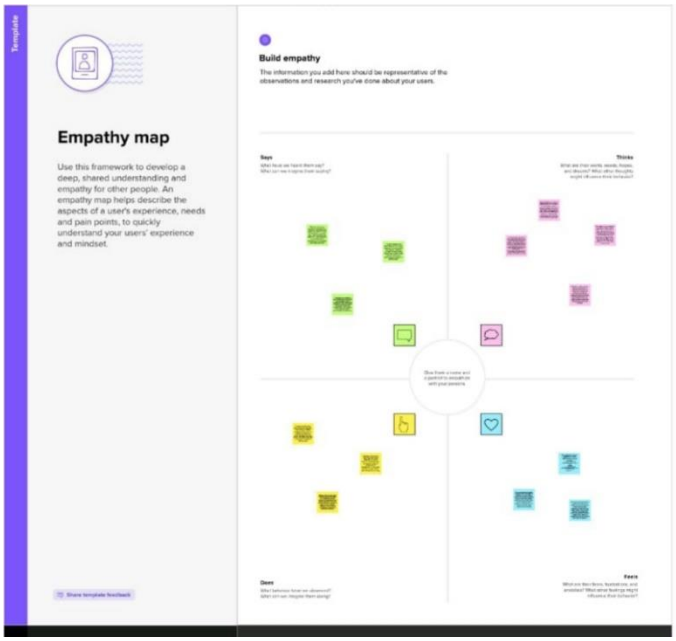
The importance of Customer Relationship Management (CRM) Systems in Higher Education /Study portals.

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's important to your operations, all in one easy-to-access place.

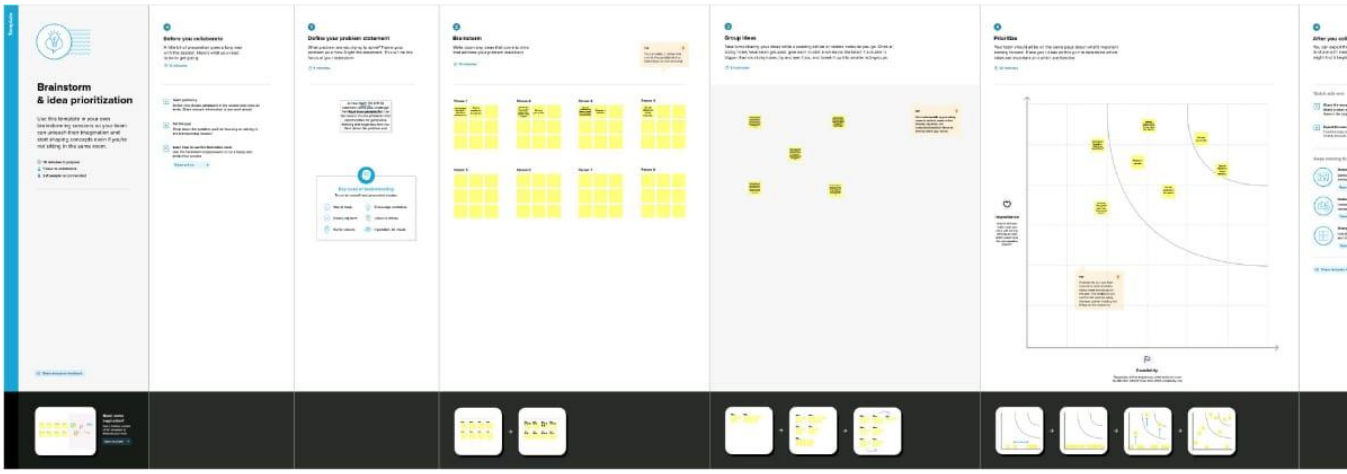
2. PROBLEM DEFINITION AND DESIGN THINKING

A CRM tool lets you store customer and prospect contact information, identify sales opportunities, record service issues, and manage marketing campaigns, all in one central location — and make information about every customer interaction available to anyone at your company who might need it

2.1 EMPATHYMAP



2.2 IDEATION & BRAINSTORMING MAP



3.RESULT

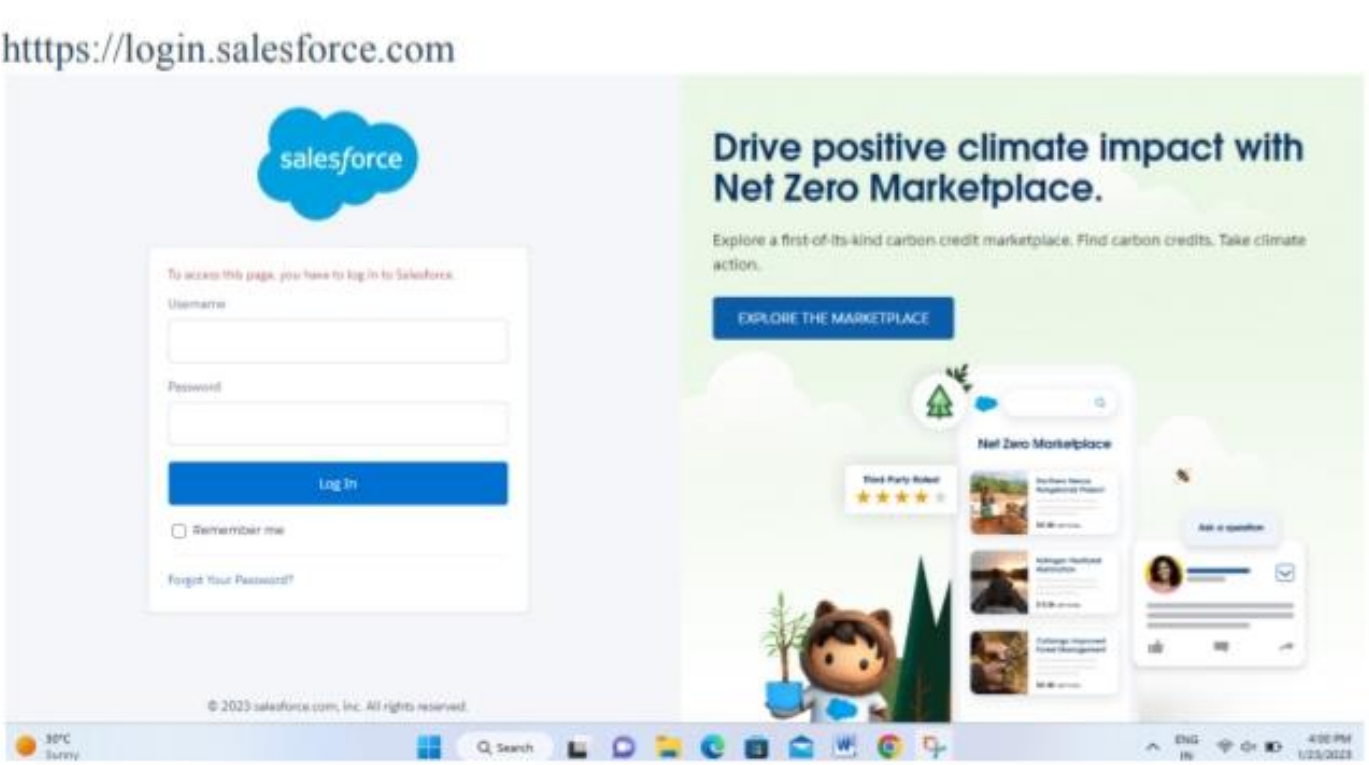
3.1 ACTIVITY AND SCREENSHOTS

1.Creation of salesforce platform

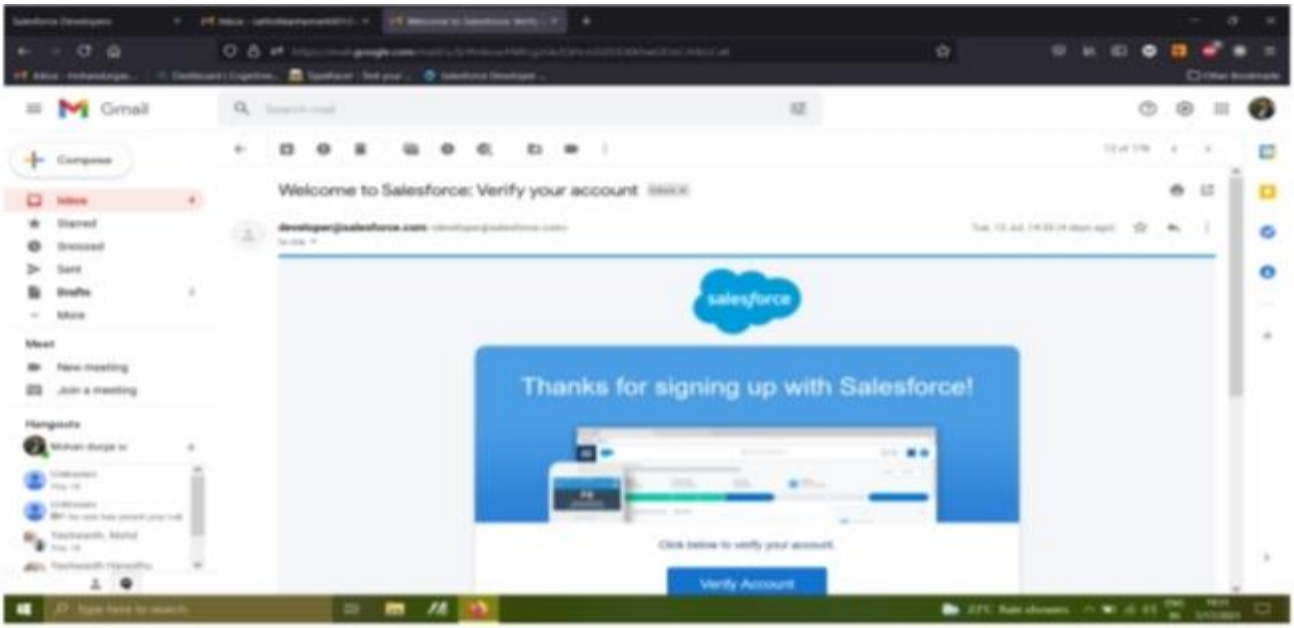
1. Go to developers.salesforce.com/

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



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

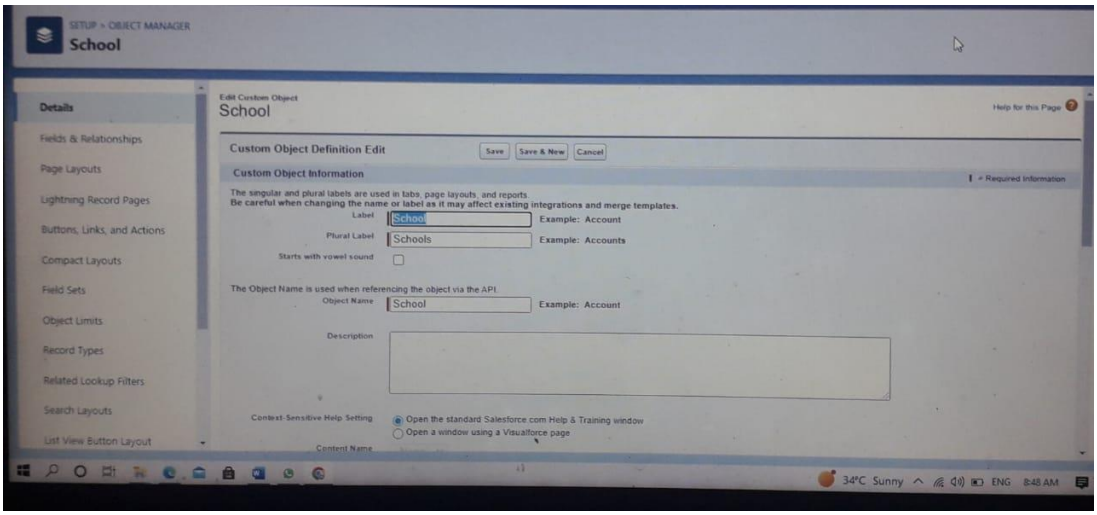


2. Creation of custom Objects: School, Student & Parent

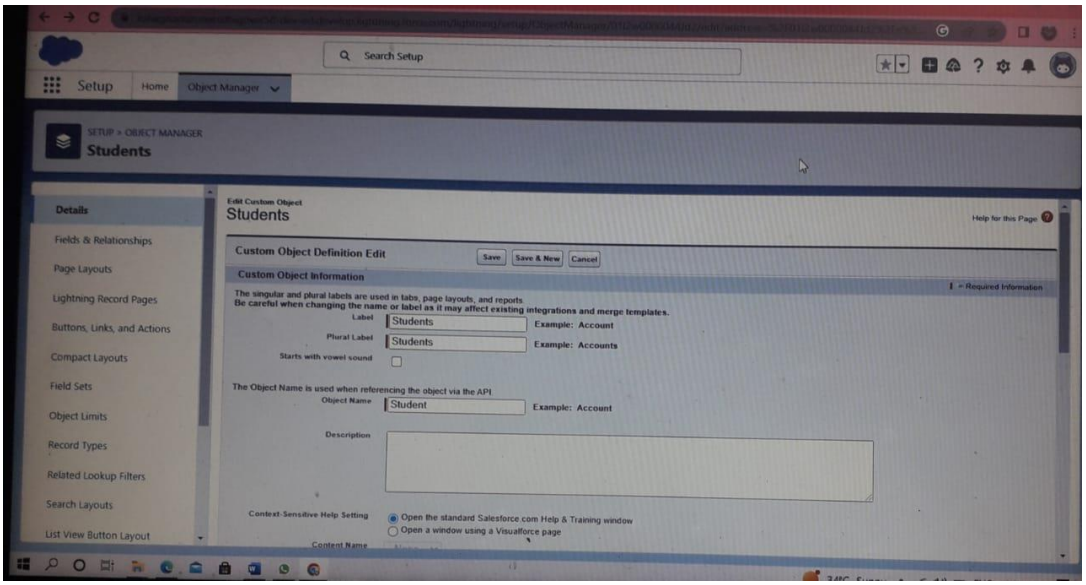
For this school management we need to create 3 objects i,e school, parents and students. The below steps will assist you in creating those objects. Click on the gear icon and then select Setup. Click on the object manager tab just beside the home tab. After the above steps, have a look on the extreme 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

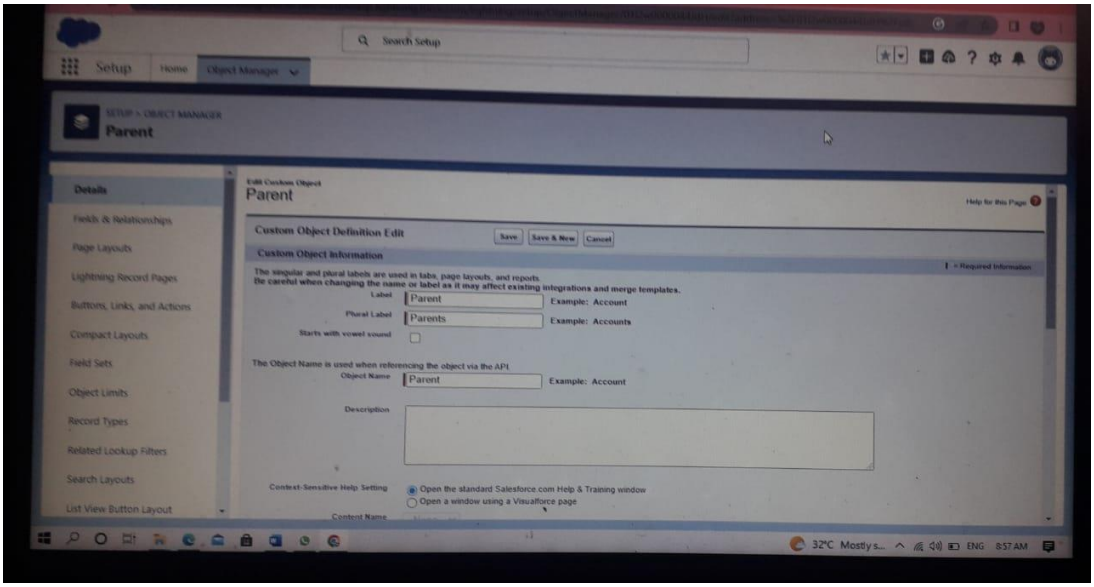
2.1 Custom Objects SCHOOLS:



2.2 Custom Objects STUDENTS:

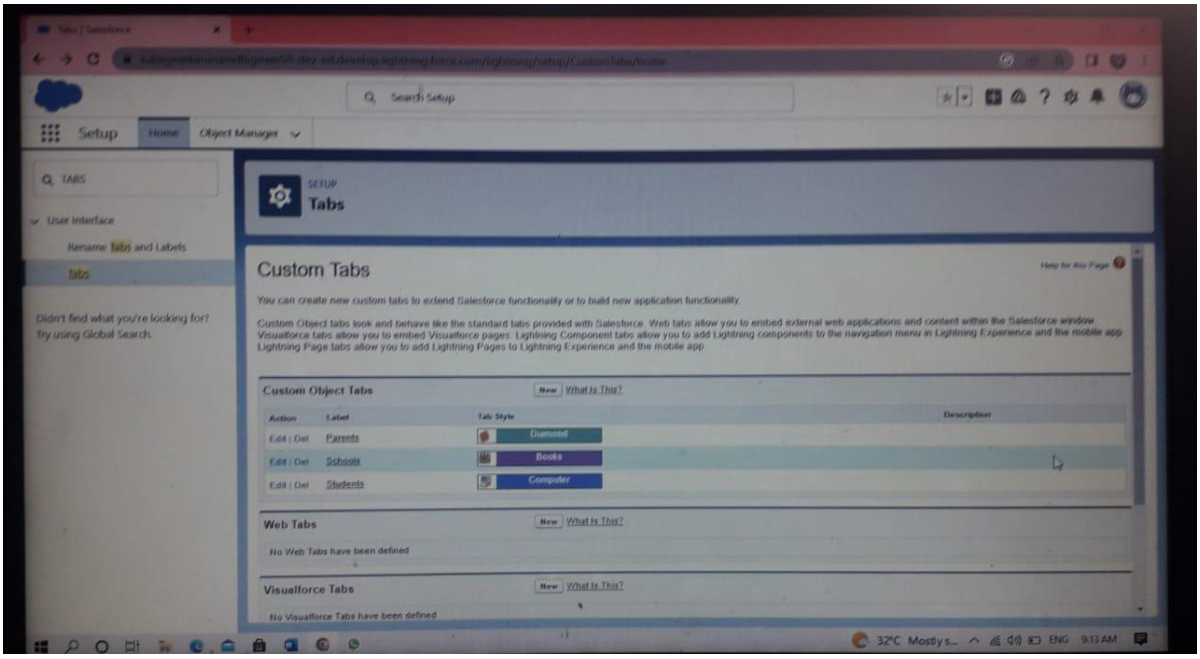


2.3 Custom Objects PARENTS:



3. create a custom tab

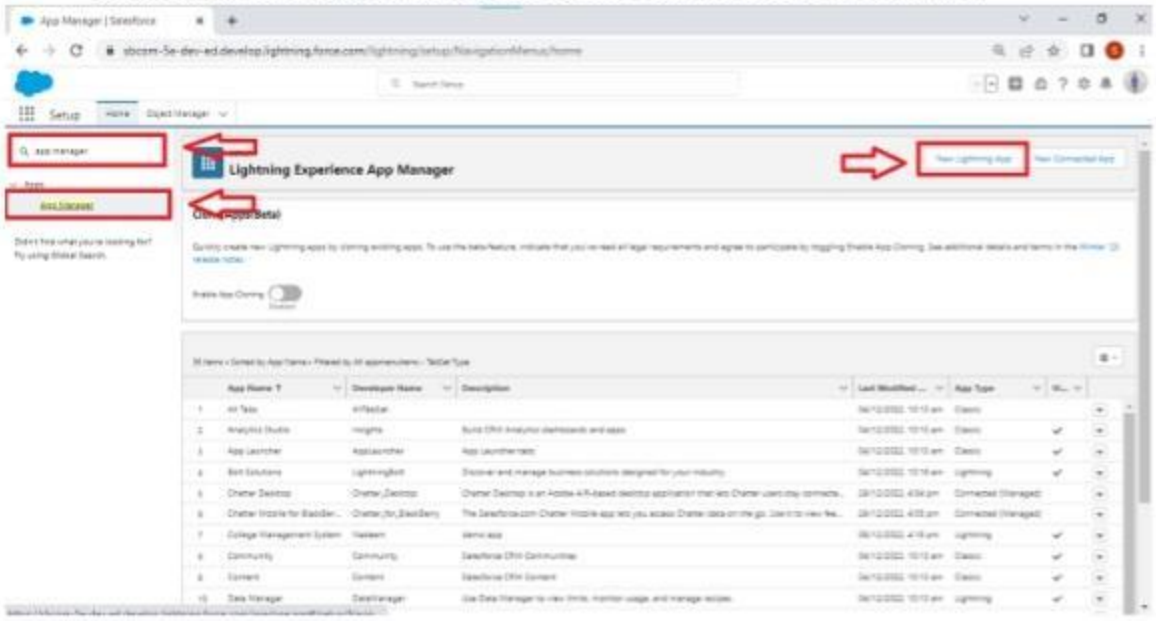
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New. For Object, select School. For Tab Style, select any icon. Leave all defaults as is. Click Next, Next, and Save.



4. Creation of custom Objects Lightning 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 & Fini



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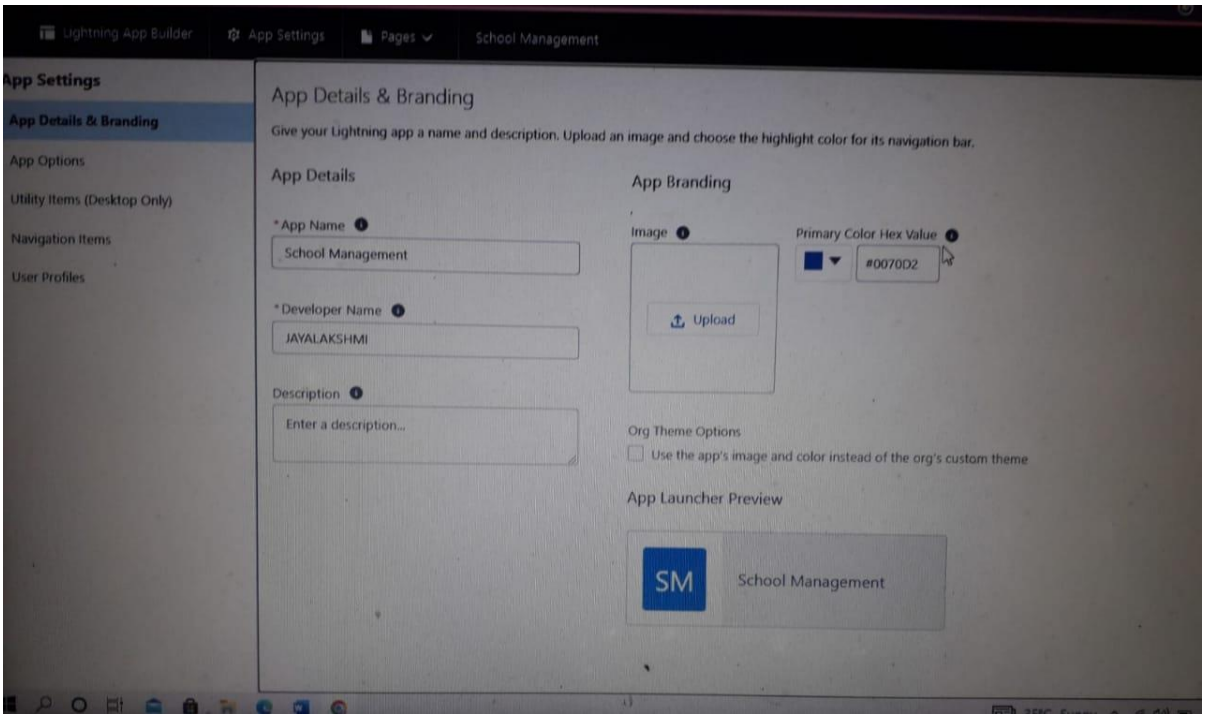
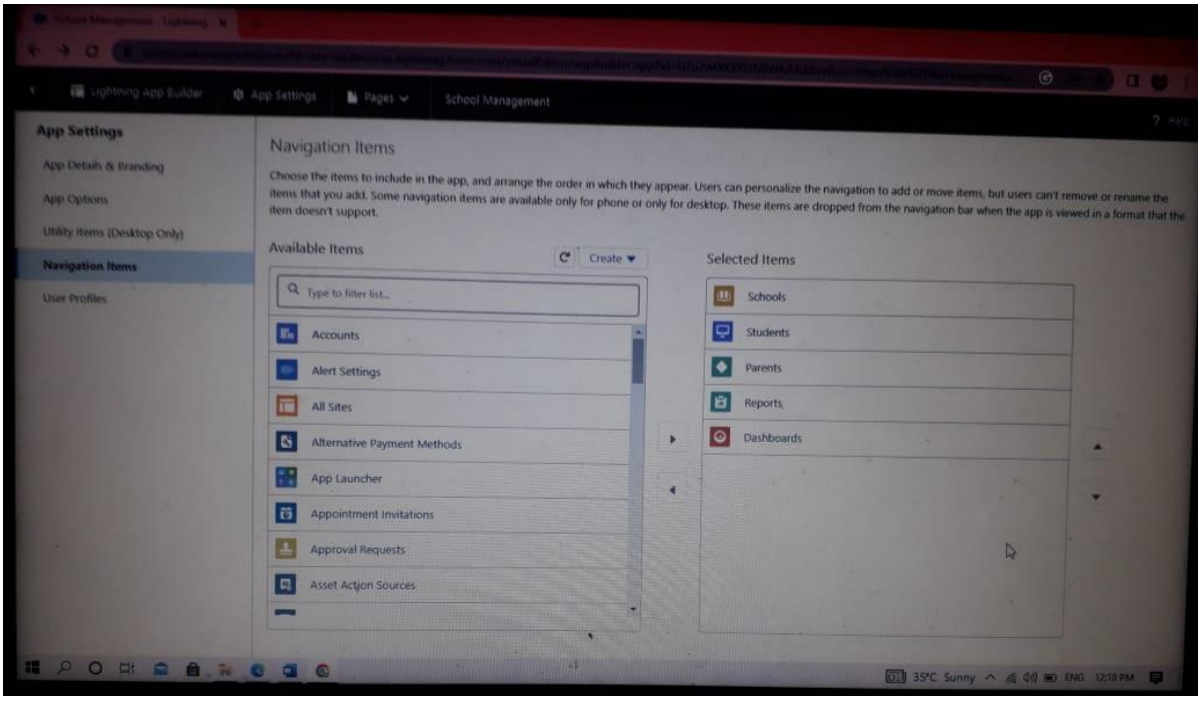
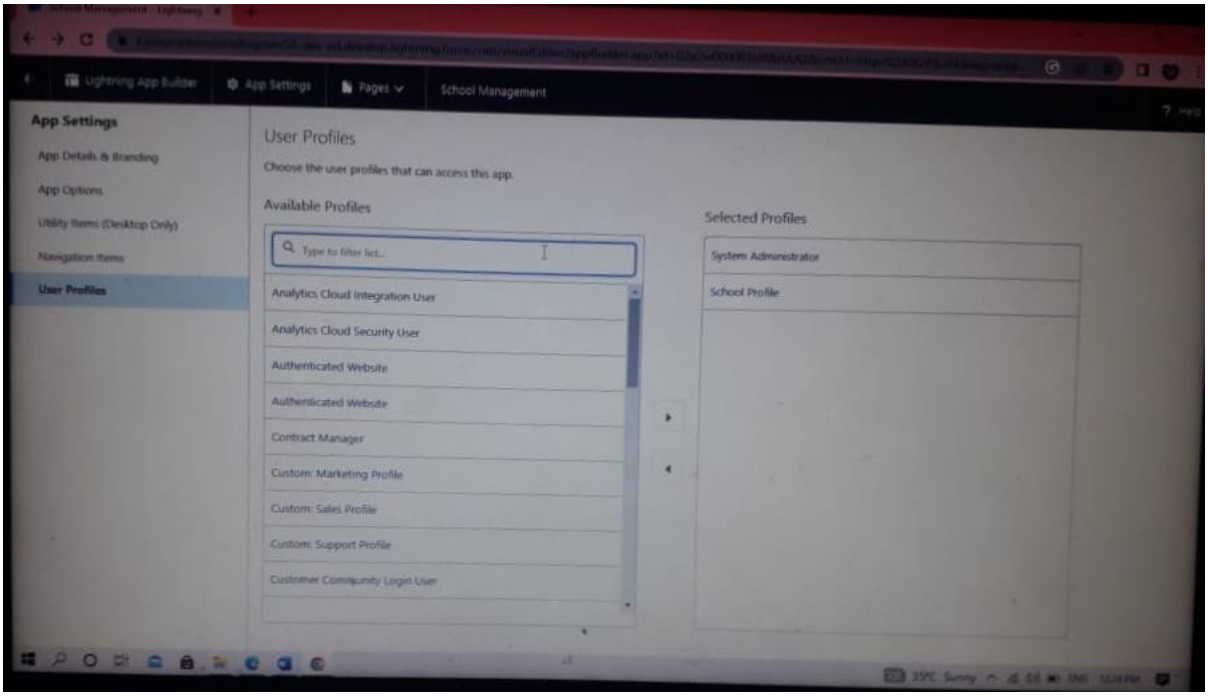


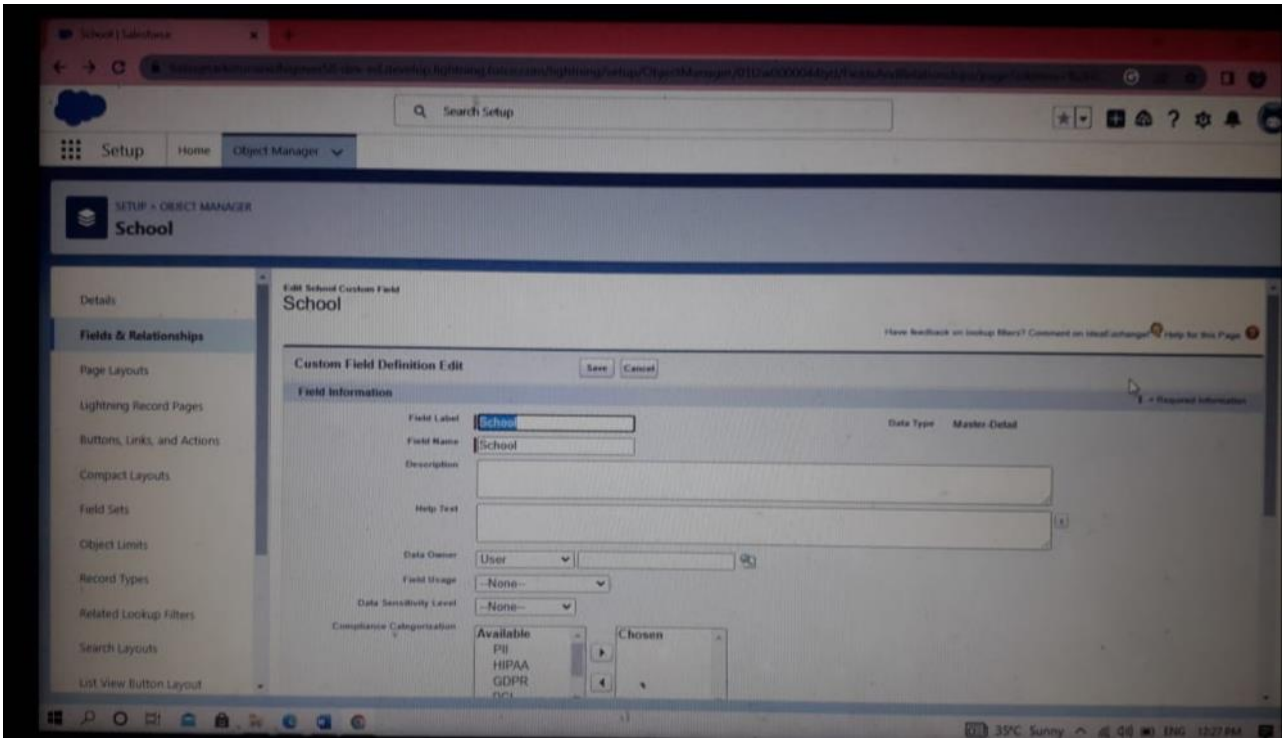




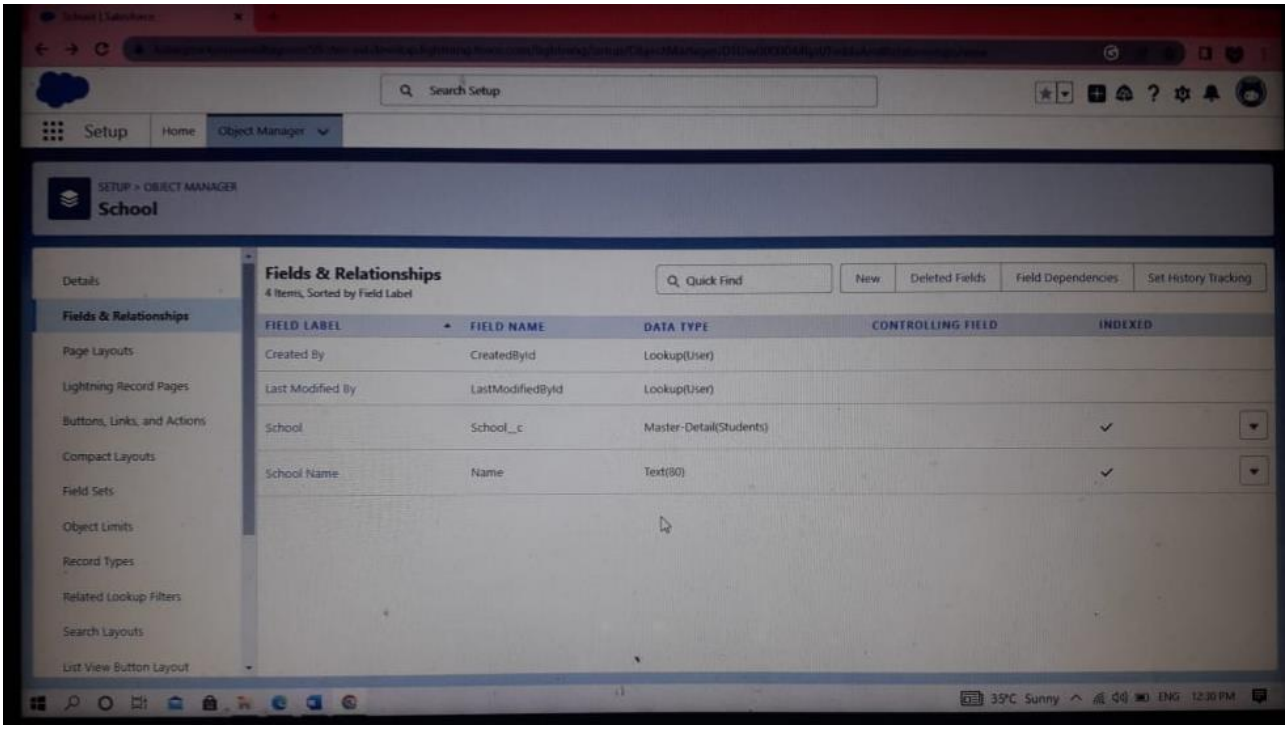
5. Creation of custom Objects Fields and Relationship:

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.

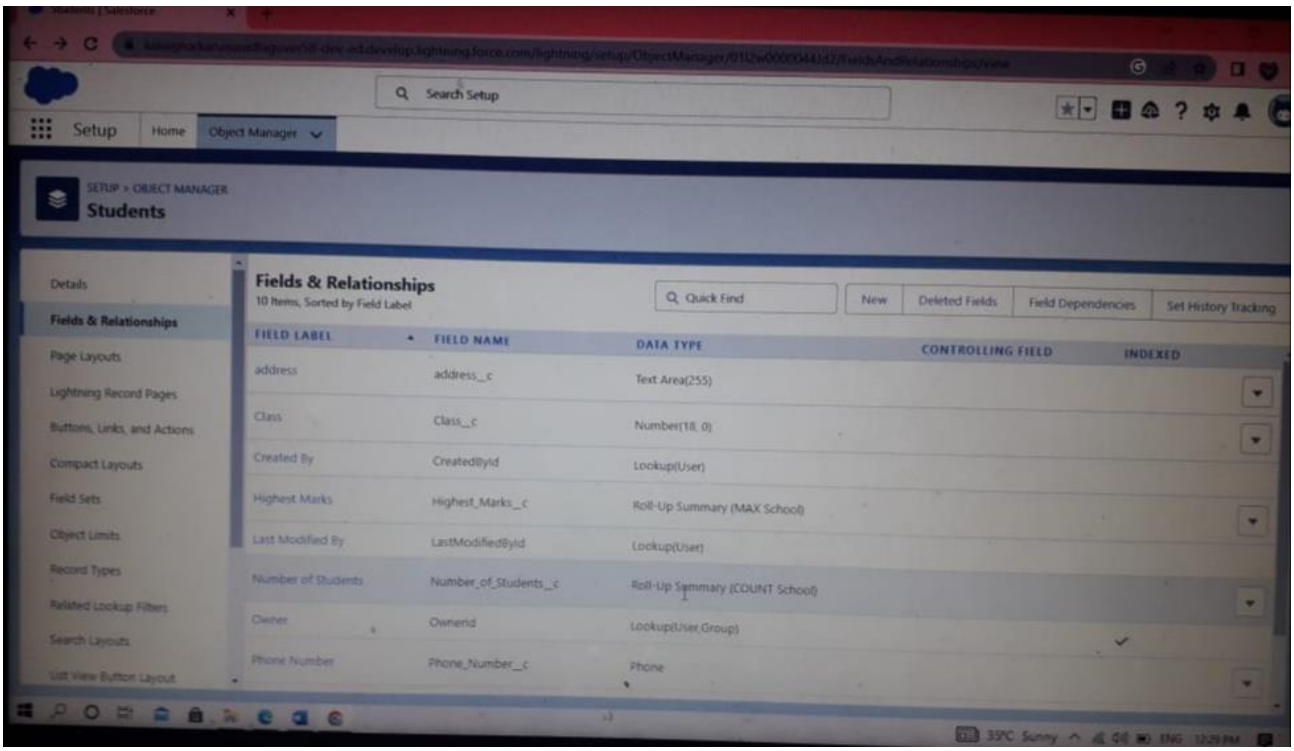
click the gear icon and select Setup. This launches Setup in a new tab. Click the Object Manager tab next to Home. Select School. Select Fields & Relationships from the left navigation, and click New. Now we're ready to make a custom field. Let's do this! Select the Text Area as the Data Type, then click Next. For Field Label, enter Address. Click Next, Next, then Save & New. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field labels.



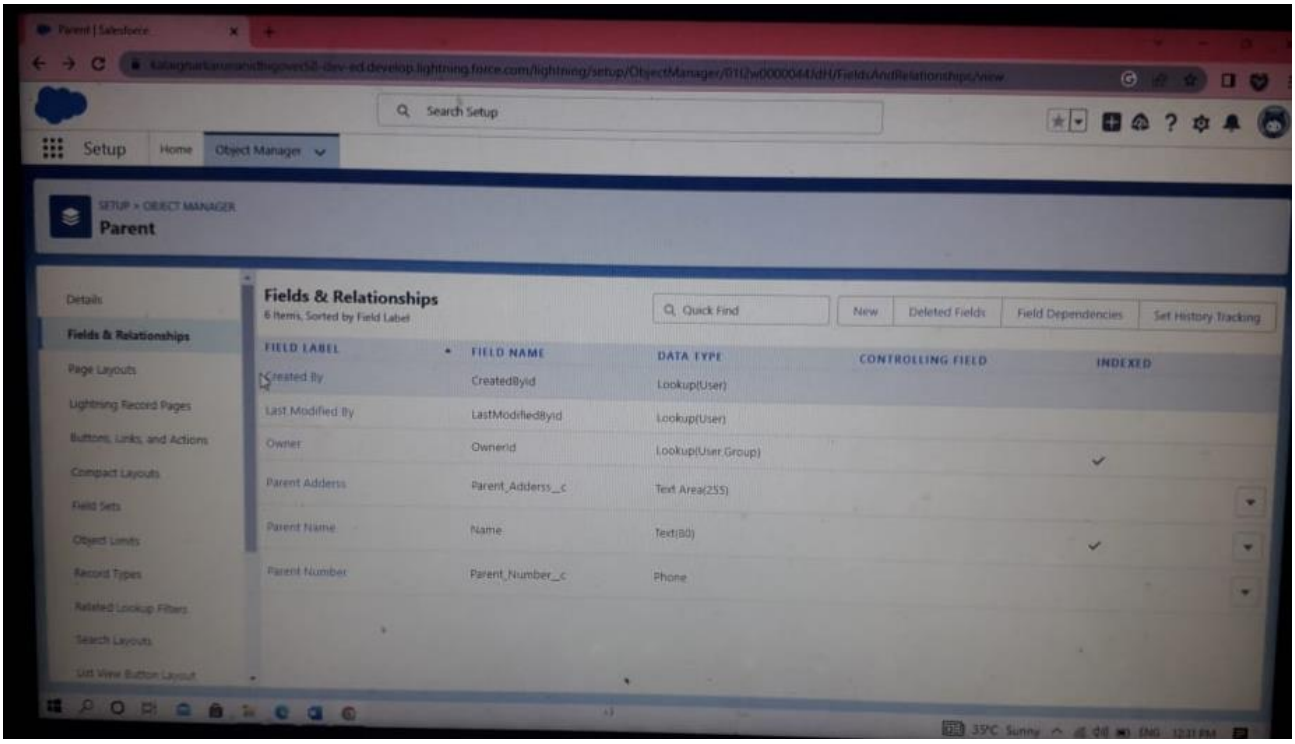
SCHOOL:



STUDENTS:

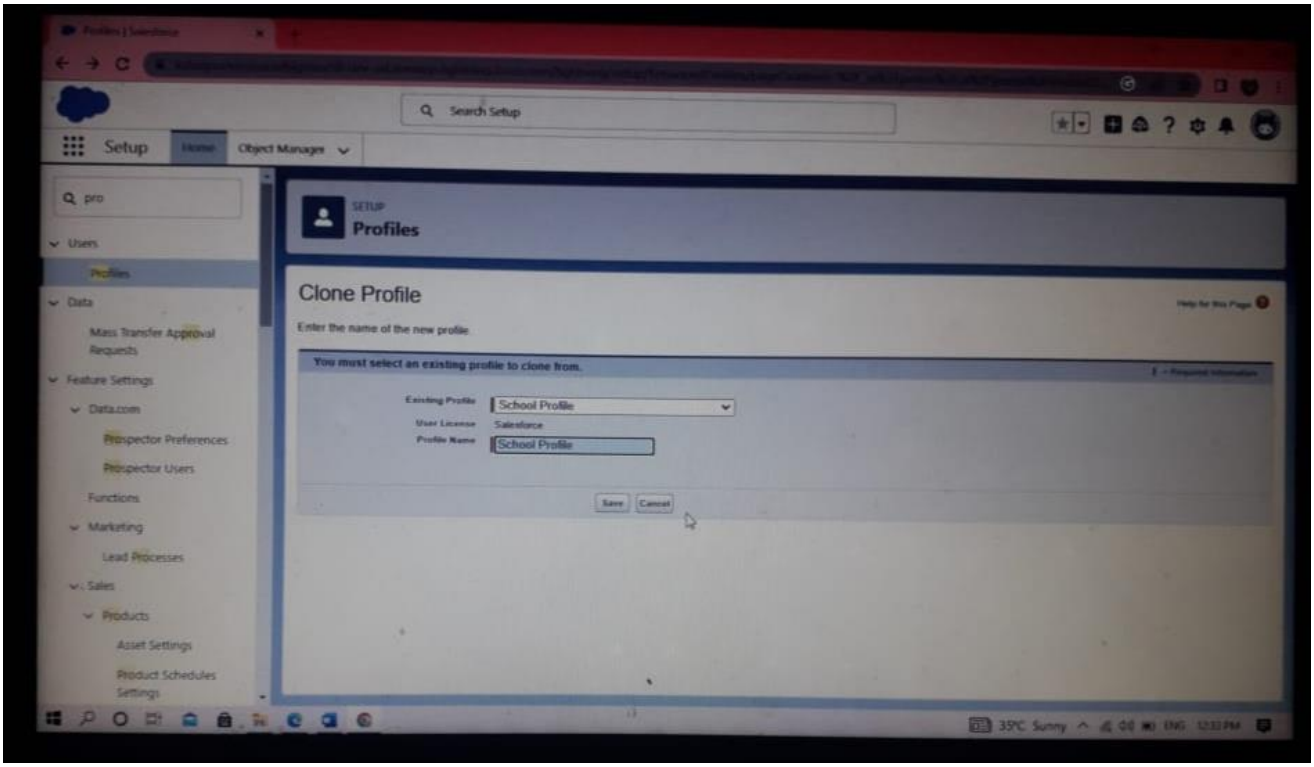


PARENT:



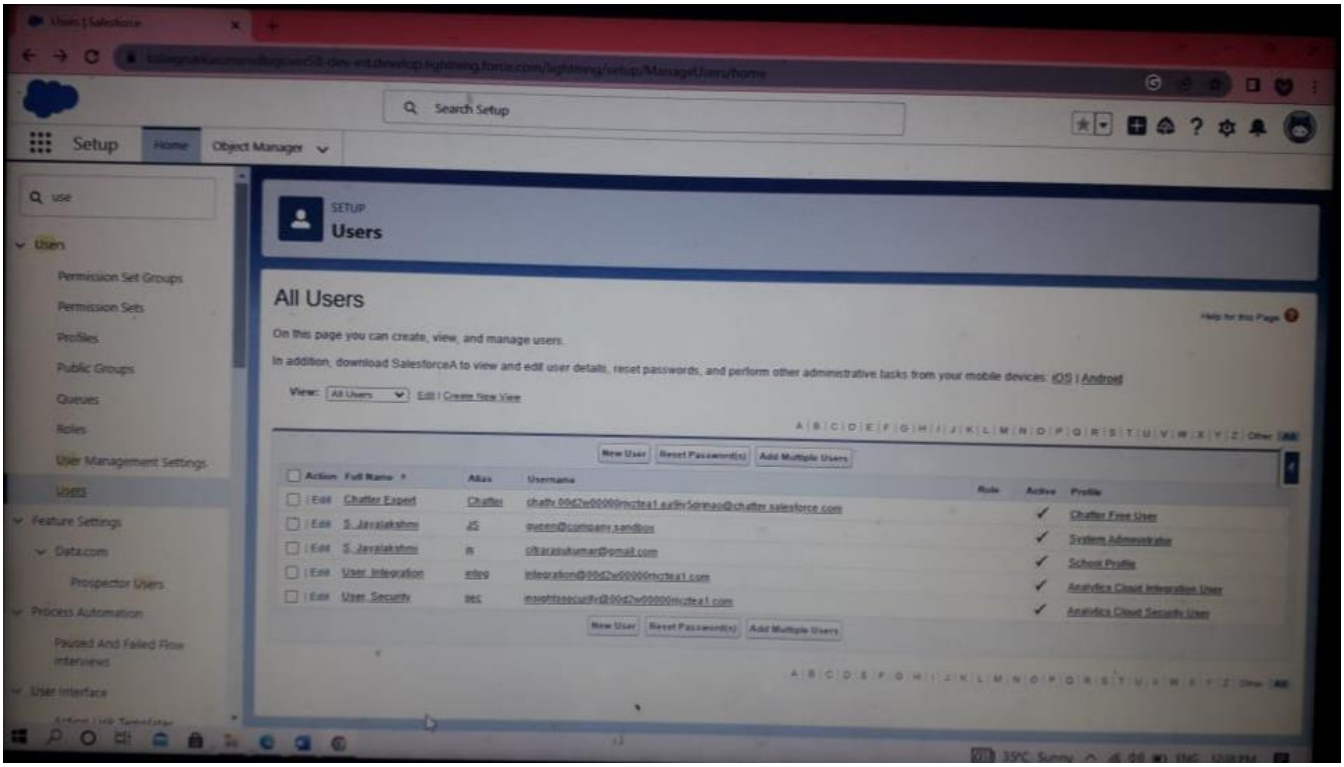
6. Creation of custom Objects Profile:

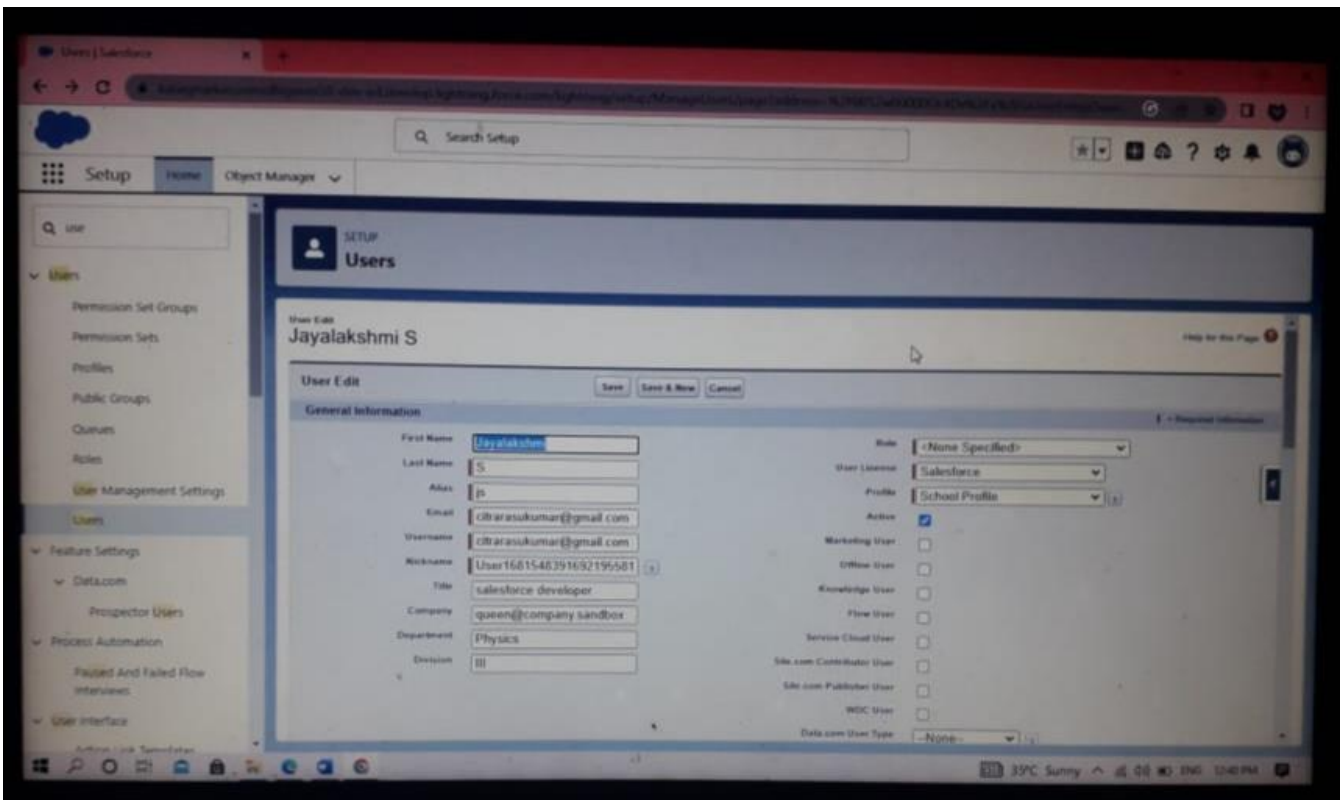
From the list of profiles, find Standard User. Click Clone. For Profile Name, enter School profile. Click Save. 5. While still on the School profile page, then click Edit. 6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile.



7. Creation of custom Objects Users:

From Setup, in the Quick Find box, enter Users, and then select Users. Click New User. 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. Select a User License As salesforce. Select a profile as a School profile. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email. Similarly follow the above steps and create 3 users as Teachers and principals.


Search Setup
Setup
Home
Object Manager
SETUP
Users
All Users
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
New User
Reset Password(s)
Add Multiple Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow Interviews
User Interface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Department
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Division
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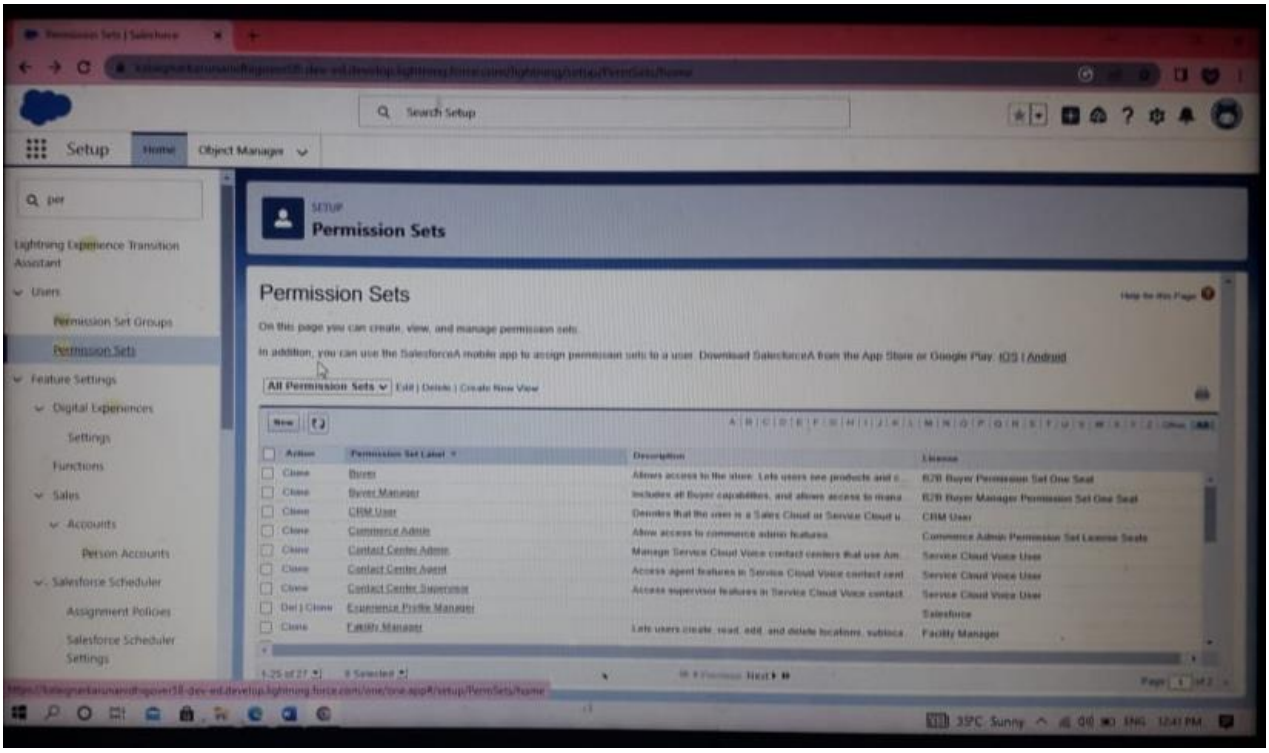
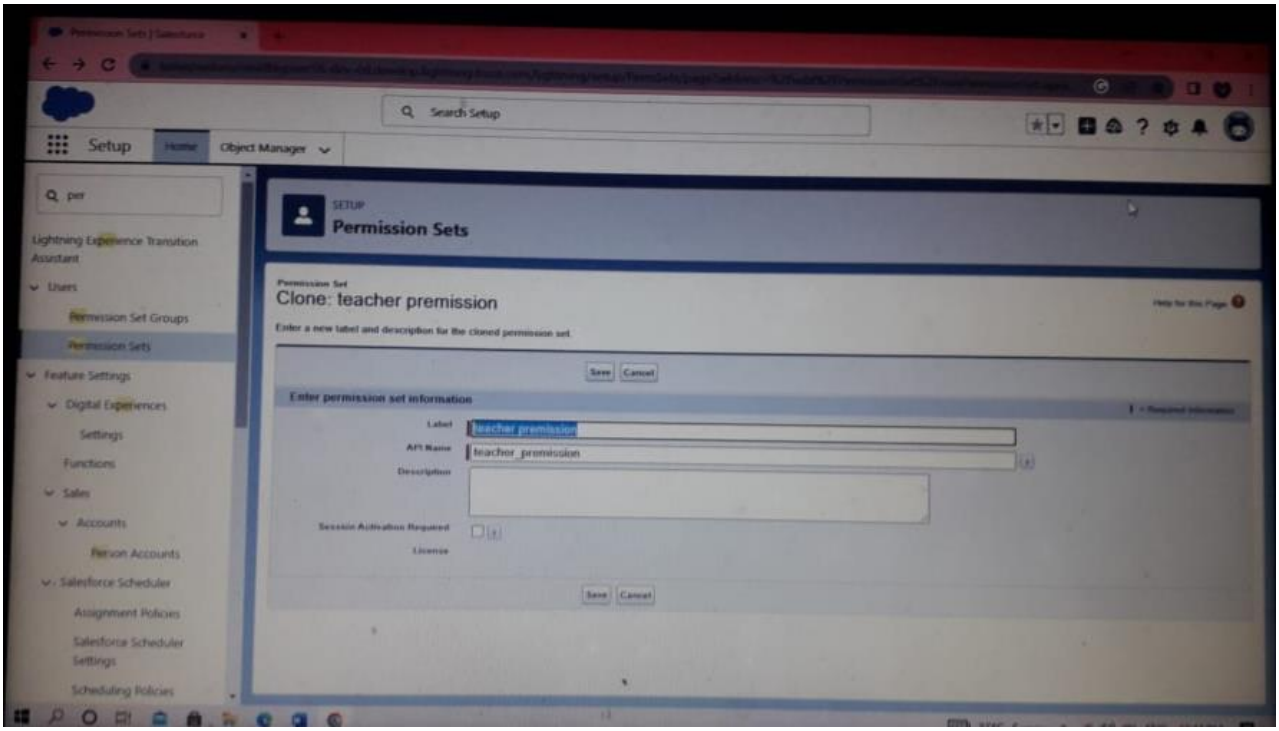
Role
<None Specified>
User License
Salesforce
Profile
School Profile
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
WDC User
Data.com User Type
None
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow Interviews
User Interface

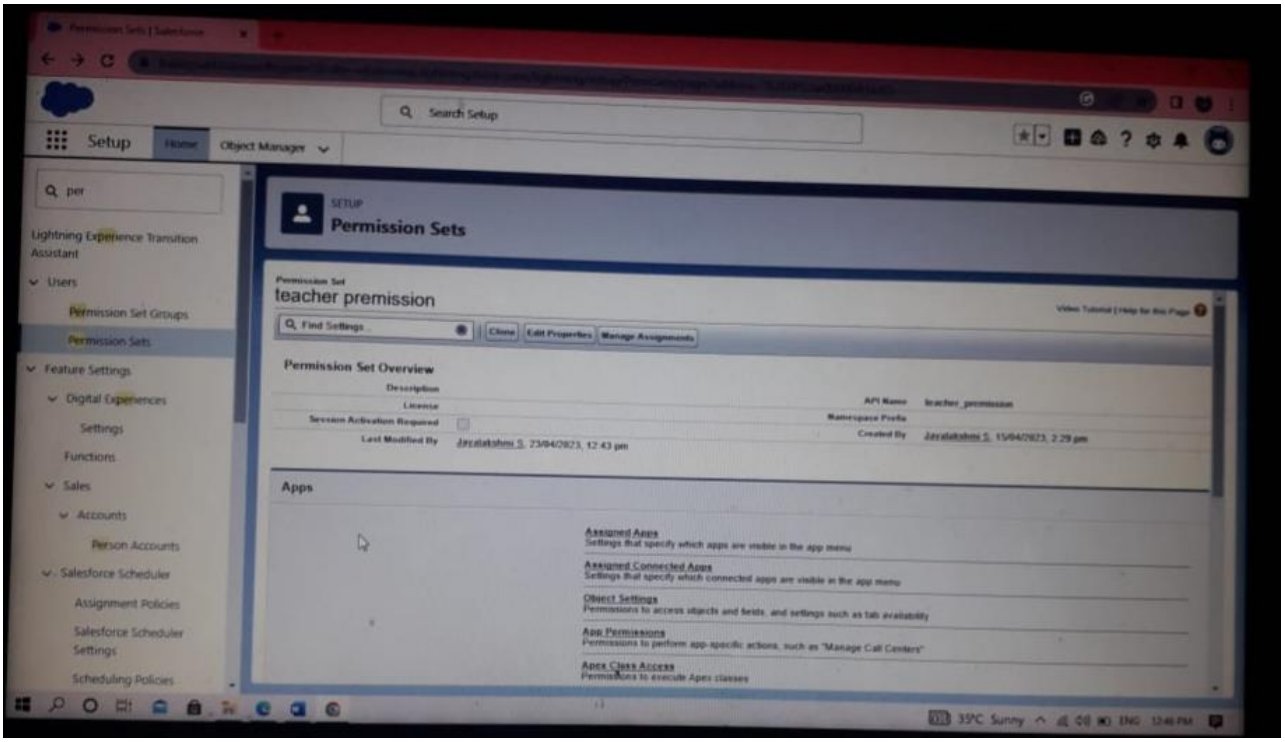
8. Creation of custom Objects Permission sets:

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

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.





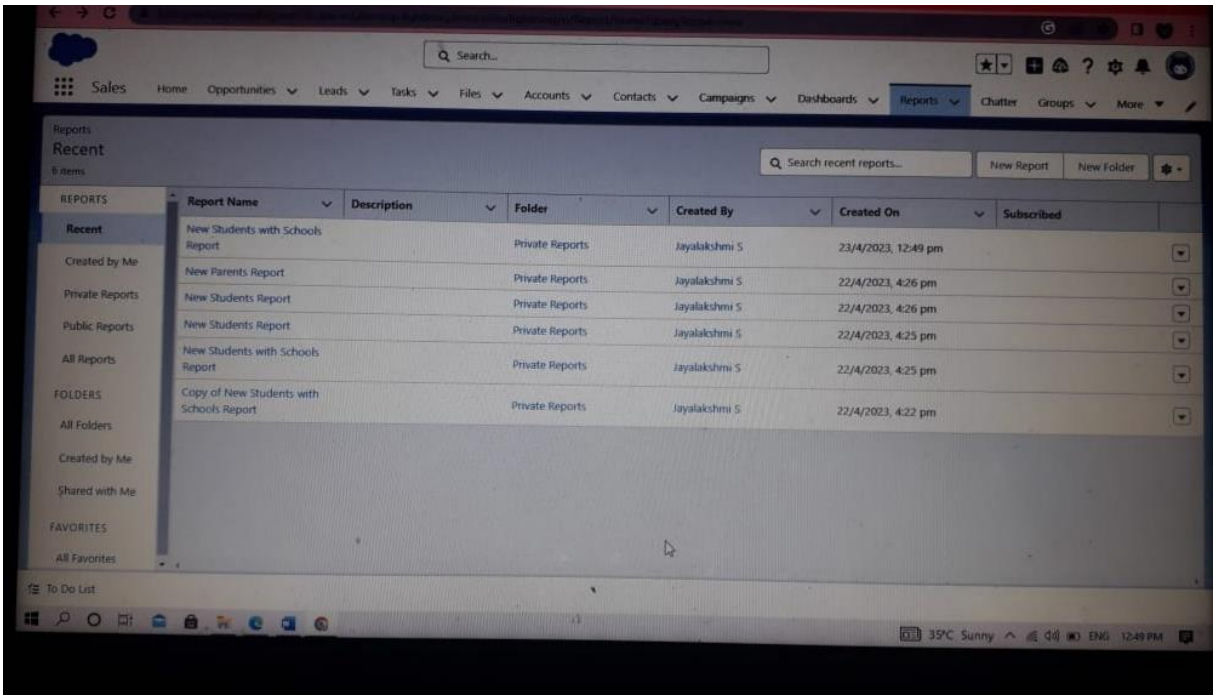


Similarly follow the above steps for the permission set2. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets. Click New. Give the name of the

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.

9. Creation of custom Objects Reports:

A report is a list of records that meet the criteria you define. From the Reports tab, click New Report. Select the report type as School with students and parents for the report, and click Create. Customize your report, then save or run it.



10. TRAILHEAD PROFILE PUBLIC URL

Team Lead- Jayalakshmi S

https://trailhead.salesforce.com/today

Team Member-1- Jayanthi N

https://trailblazer.me/id/njayd

Team Member-2-Kalfath Farciya Banu B

http://trailblazer.me/id/kbanu14

Team Member-3- Kanika B

https://trailblazer.me/id

11. ADVANTAGES&DISADVANTAG

ADVANTAGES

Using a CRM system provides educational organisation with the data they need to make informed decisions about recruitment, marketing, and other key areas. It also allows you to improve student engagement by tracking student interactions and providing personalised communication.

DISADVANTAG

CRM costs. One of the greatest challenges to CRM implementation is cost. Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. Poor communication. Lack of leadership.

12. APPLICATIONS

Digitise your entire application process. it's good practice for schools/colleges/universities to make the application process as smooth and simple as possible for prospective students**.**

13. CONCLUSION

From this study it can be concluded that the customer relationship management in Company is satisfactory. The company is using various CRM practices like custom ization of the product, maintaining interaction with the customers regularly and providing good quality product etc.

14.FUTURESCOPE

[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.

The scope of CRM includes a wide range of activities, from managing customer contact information to developing personalized marketing campaigns. In order to be effective, CRM must be tailored to the specific needs of each business. As such, the scope of CRM can vary greatly from one company to the next.