PROJECT REPORT

CRM APPLICATION FOR SCHOOL AND COLLE

INTRODUCTION

OVERVIWE

Creation of an Application for school Management.

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

purpose

Project Description

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.

What you'll learn

1. Real Time Salesforce Project

- 2. Object & Relationship in Salesforce
- 3. Profile
- 4. Users
- 5. Reports
- 6.Permission sets

7.Reports

Creation sales force Prospective deals might have been organized something like this:

Creating Developer account Are you new to Salesforce? Not sure exactly what it is ,or how to to any of these questions, then you are in the right place .this module is for you.

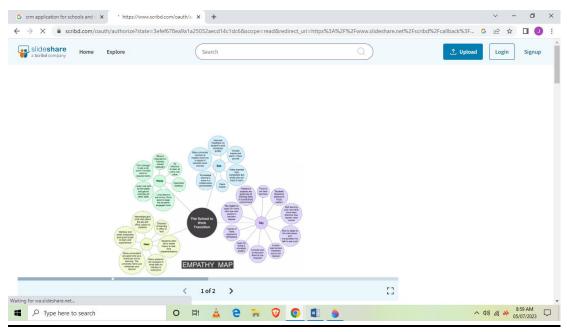
Welcome to sales force! sales force is a game changing technology, with a host of productivity boosting features, that will help you sell smarter and faster .as you work towards your badge for this module, we will take you though these features and these question, what is sales force, anyway?

What is sales force?

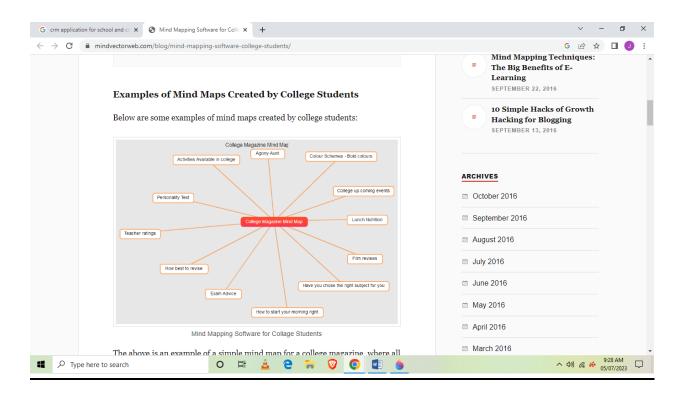
Salesforce is customer success platform, designed to help you sell, service, market, analyze ,and connect with your customers. Salesforce has everything you need to run your business from anywhere .using standard products and features ,you can manage relationships with prospect and customers, collaborate and engage with Employees and partners, and store your data securely in the cloud .So what does that really mean ? well, before Salesforce, your contacts, emails, follow-up tasks, and

problem definition & design thinking

Empathy map



IDEATION DEFINITION & DESIGN THINKING



RESULT

s.no	Object name	Field Lable	Fields in the object Data type
1.	School	School	School
2.	Student	Student	Student
3.	Parent	Parent	Parent

ACTIVITY AND SCREENSHOT

Creating Developer org in Salesforce.

- 1. Go to developers.salesforce.com/
- 2. Click on sign up.
- 3. On the sign up form, enter the following deatail:
 - a. Frist name & last name
 - b. Email
 - c. Role: developer
 - d. Company :collage name
 - e. Country: India
 - f. Postal code:pin code
 - g. Username :should be a combination of your name and company this need not be actual email id, you can give anything in this format:

username@organization.com u

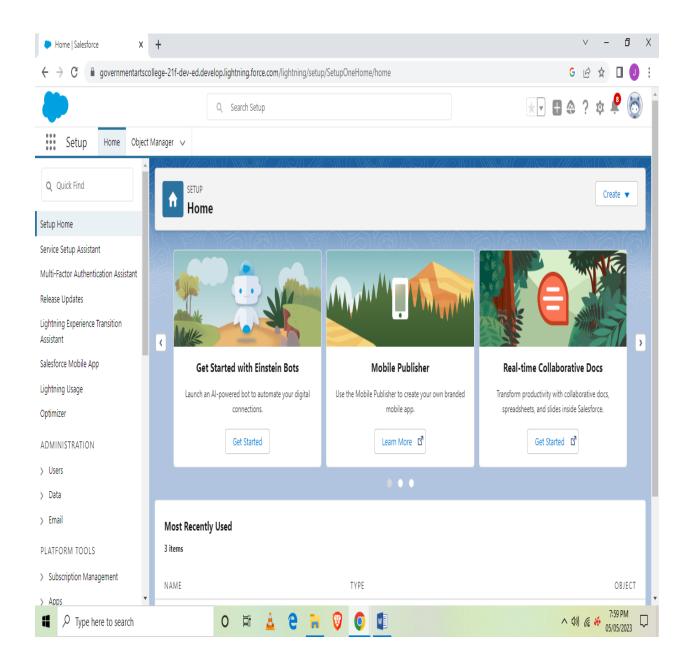
click on sign up after filling theseon sign up after filling these

Account activation

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

Login to your Salesforce ac

- 1. GO tosalesforce.com and click on login
- 2.Enter the username and passwortd that you just created
- 3. After login this is the the home page which you will see.



Milestone-2;object

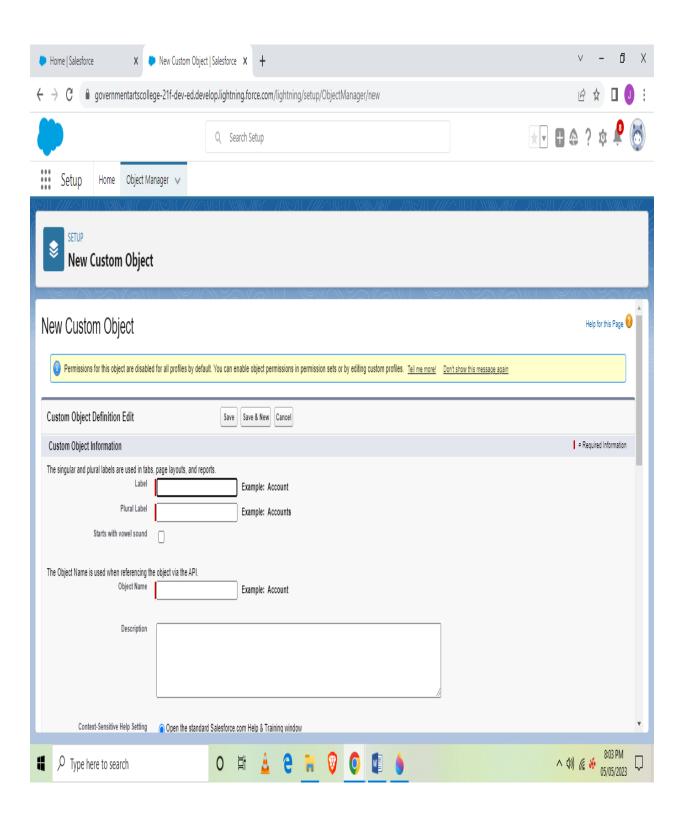
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types. standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboard, etc.

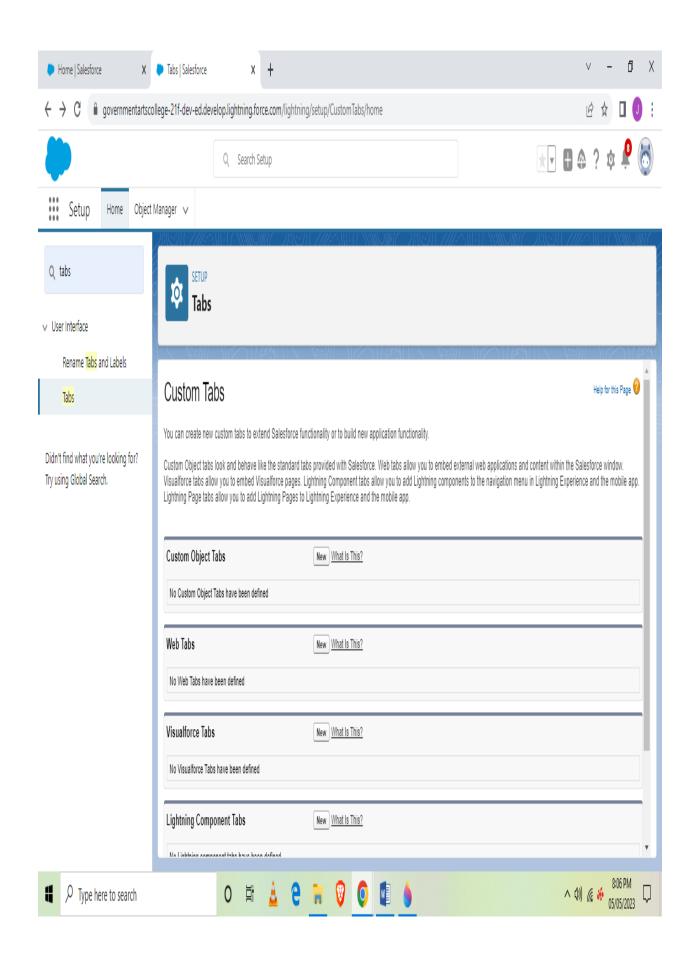
Activity-1; creation of school object

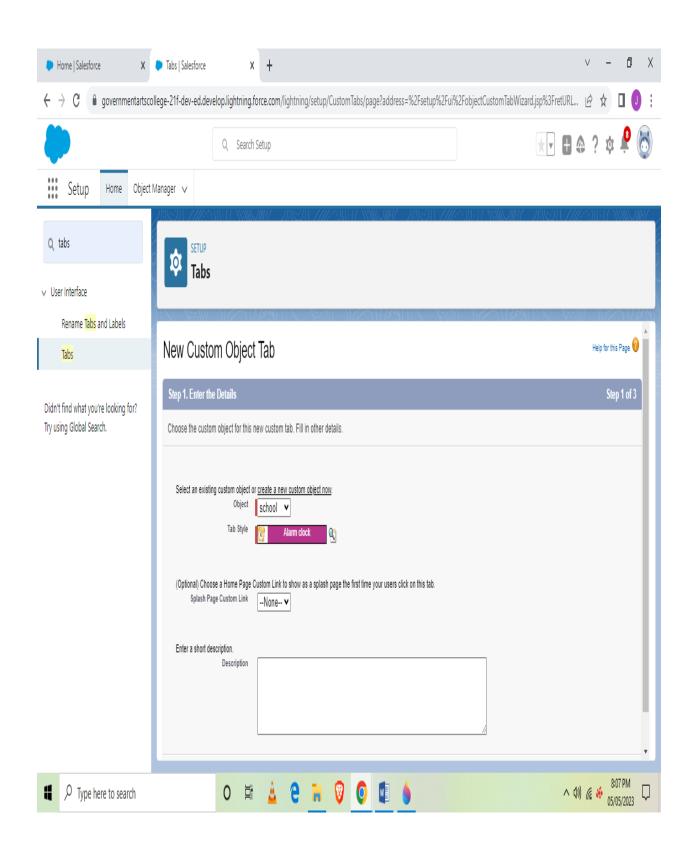
Creation of objects for school management

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;
 - Lable;school
 - Plural name; schools
 - Record name; school name
 - Check the allow reports checkbox
 - Check the allow search check box
 - Click save







Now create a custom tab. click the home tab, enter tabs in quick find and select the tab.

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. In the same way create other objects such as students and parents.

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 a drop down click on that and select custom object.
 - On the custom object definition page, create the object as follows
 - :students
 - Plural name ;Students
 - Recort 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 tab in quick find and select tab.

- 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
 - Record name :parent name
 - Check the allow report check box
 - Check the allow search check box
 - Click save.

Now create the 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

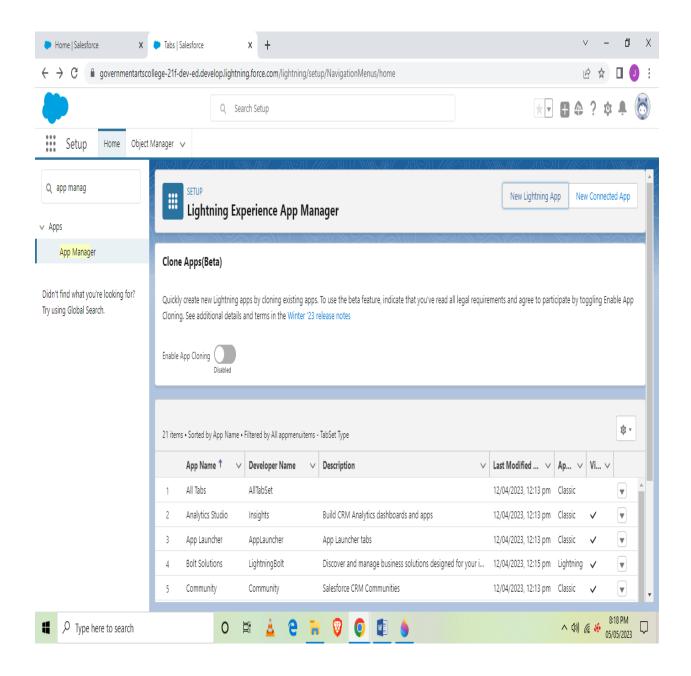
Milestone -3: lighting app

Apps is sales force 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

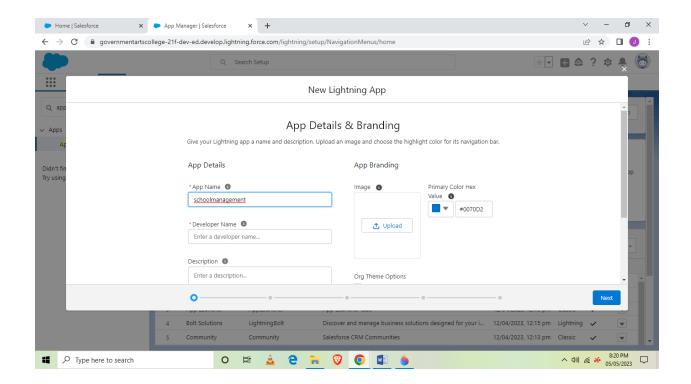
create the school management app.

• From set up, enter app manager in the quick find and select app manager



Click new lighting app .enter school management 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 item ,select schools , students , parents ,reports , and dashboards and move them to selected items .click on save
- from available profiles ,select system administrator and move it to selected profiles. Click save &finish
- to verify your changes, click the app launcher, type school management and select the school management app.

Note:

- app launcher- displays available apps
 app name displays the current selected app.
- 3.navigation menu-displays the tabs available inside the app.

Milestone-4 Fields and relationship

An object relationship in salesforce is a two way associate between two objects. Relationships are created by creating custom relationship fields on an object.this is done so that when users view recorts, they can also see and access related data.

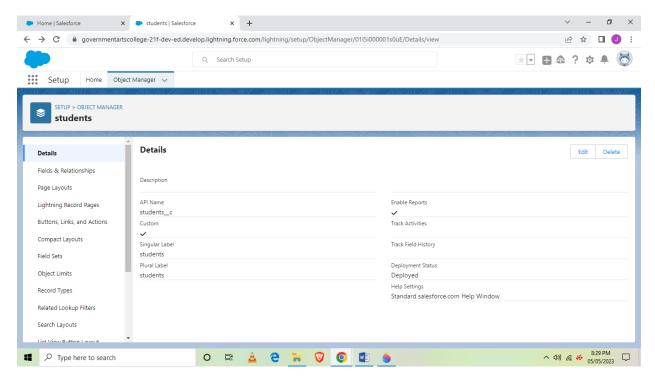
Activity:1

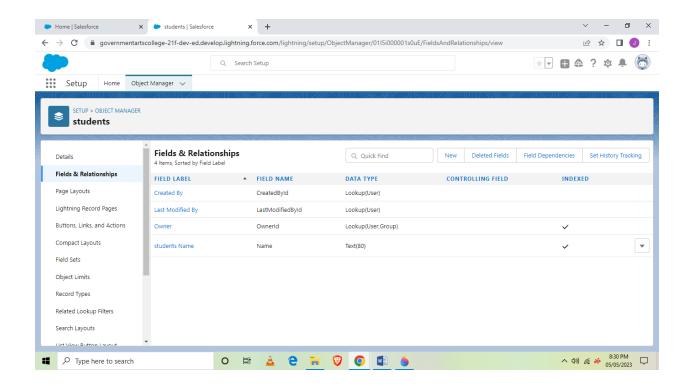
Creation of fields for the school objects:

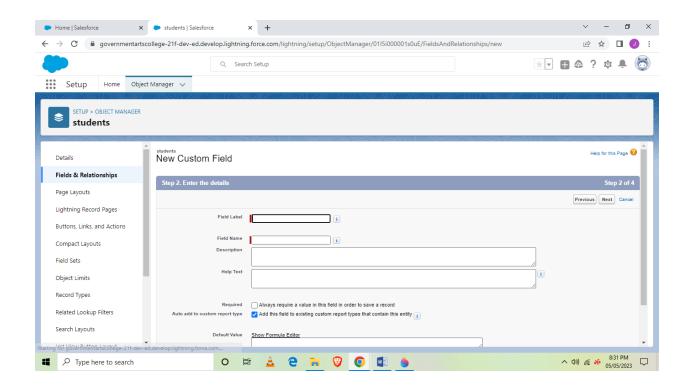
- 1. click the gear icon and select Setup. This launches Setup in a new tab. 2. Click the Object Manager tab next to Home.
- 3. Select School.
- 4. Select Fields & Relationships from the left navigation, and click New

Now we're ready to make a custom field. Let's do this!

- 1. Select the Text Area as the Data Type, then click Next.
- 2. For Field Label, enter Address.
- 3. Click Next, Next, then Save & New.
- 4. Follow steps 1 through 3 and create two more text areas with District, State and School websites as the field labels.







Now let's create the other fields and we must choose the data types of the fields carefully .Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type

Lets see this

- 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.

Lets create Roll-up summary fields to calculate the number of students

- 1. From Setup, click Object Manager and select School.
- 2. Click Fields & Relationships, then New.
- 3. Select the Roll-up summary field as data type
- 4. Enter the field label as Number of students
- 5. Click Next
- 6. Then select the master object summarized as students and then select count as roll-up and then click Next,Next and save.
- 1. From Setup, click Object Manager and select School.
- 2. Click Fields & Relationships, then New.
- 3. Select the Roll-up summary field as data type
- 4. Enter the field label as Highest Marks
- 5. Click Next
- 6. Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate.click Next,Next and save.

Activity-2:

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

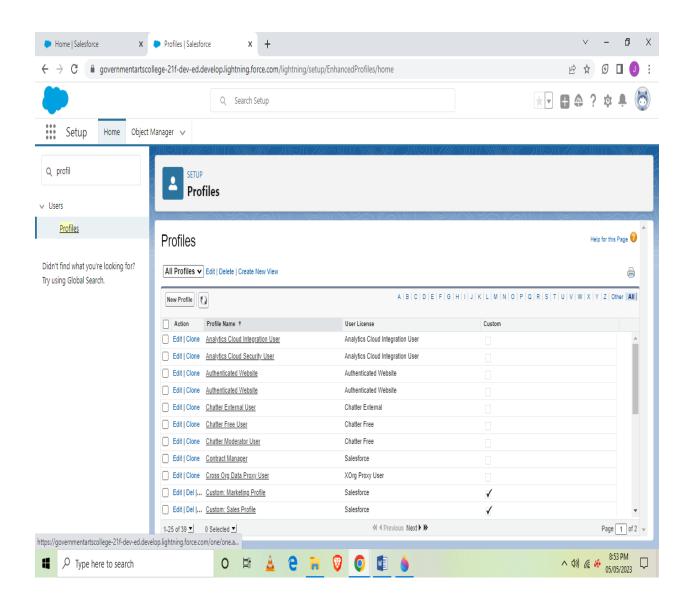
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

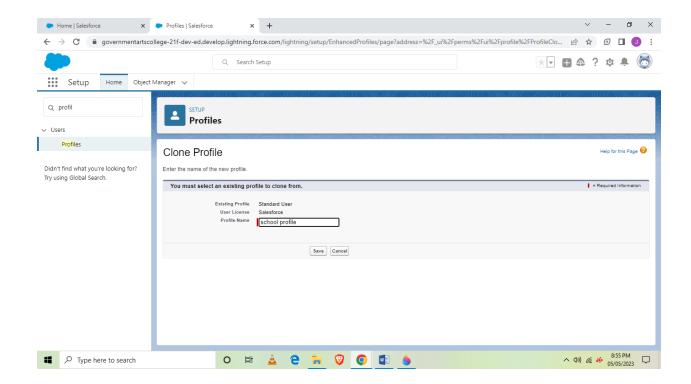
Activity:

Creation on profile:

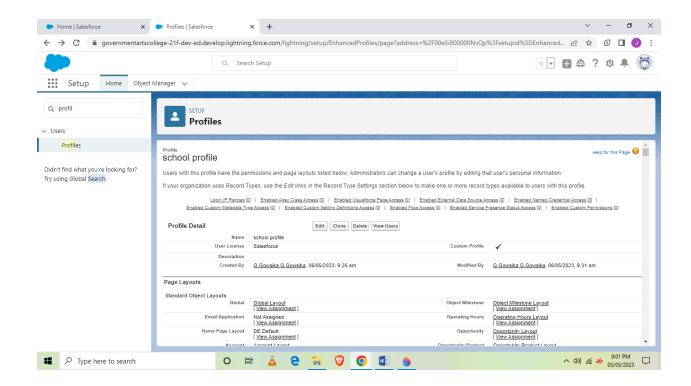
From Setup enter Profiles in the Quick Find box, and select Profiles.

- 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



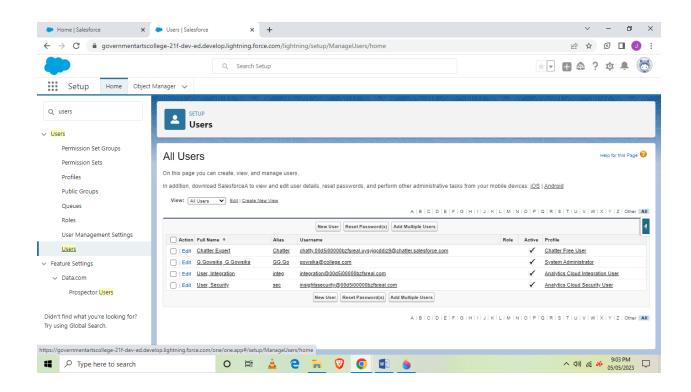
Milestone-6: Users

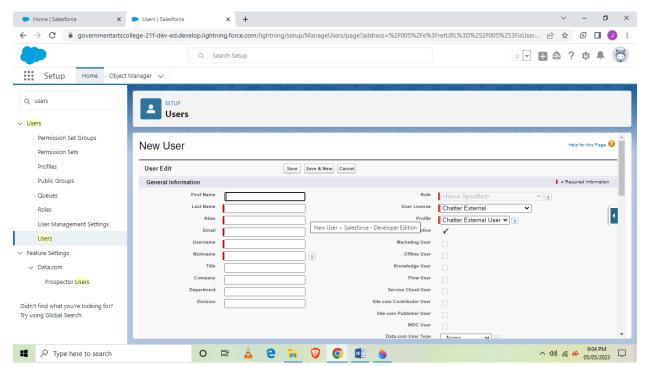
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

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:

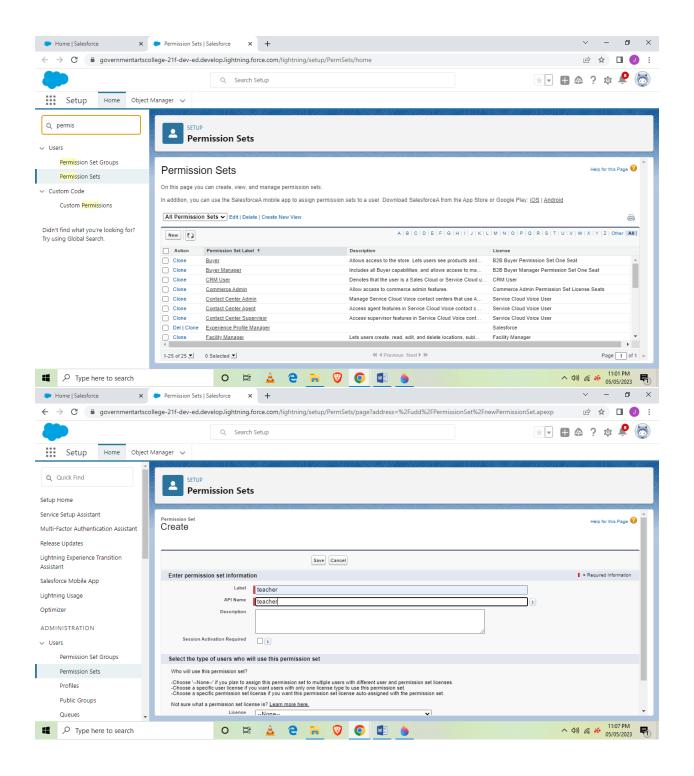
- 1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- 2. Click New
- 3. GIve the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user

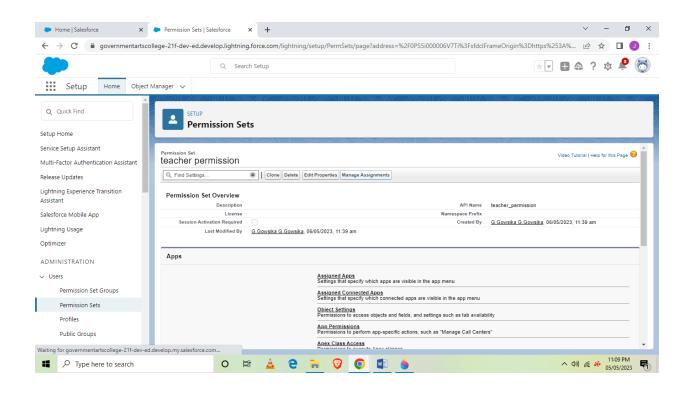
Similarly follow the above steps for the permission set 2.

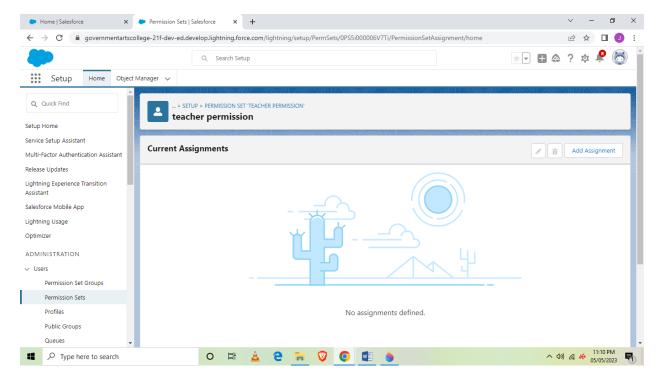
Activity-2:

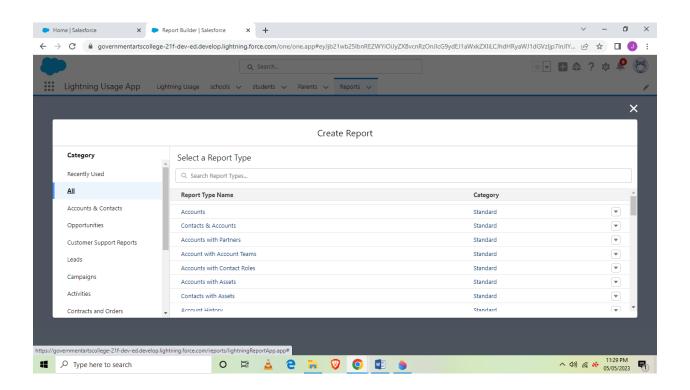
Permission sets 2:

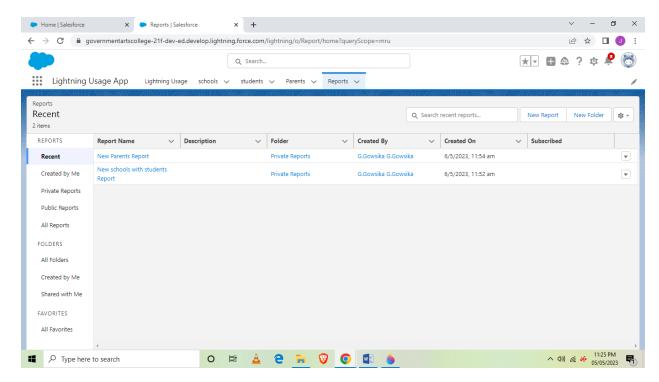
- 1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- 2. Click New.
- 3. GIve the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the











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.

TRAILHEAD PROFILE PUBLIC URL

Team head: https://trailblazer.me/id/jay271

Team member 1: https://trailblazer.me/id/kprabha22

Team member 2: https://trailblazer.me/id/ksaran23

Team member 3: https://trailblazer.me/id/ksakthivel9

ADVANTAGES AND DISADVANTAGES

Advantages:

• It Is very useful Business, school, college management and It workers.

Disadvantages:

• Improper guided manual.

APPLICATION:

- From student admission and enrollment to managing faculty and alumini relations.
- We will develop into the unique features and benefits of CRM.

CONCLUSION:

We worked well on this project. CRM Application For School And College.

FUTURE SCOPE

2026 Future Industry for Youngsters.

THANK YOU