A CRM APPLICATION FOR SCHOOLS/COLLEGE

Submitted by

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Under the guidance of

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Guest Lecture

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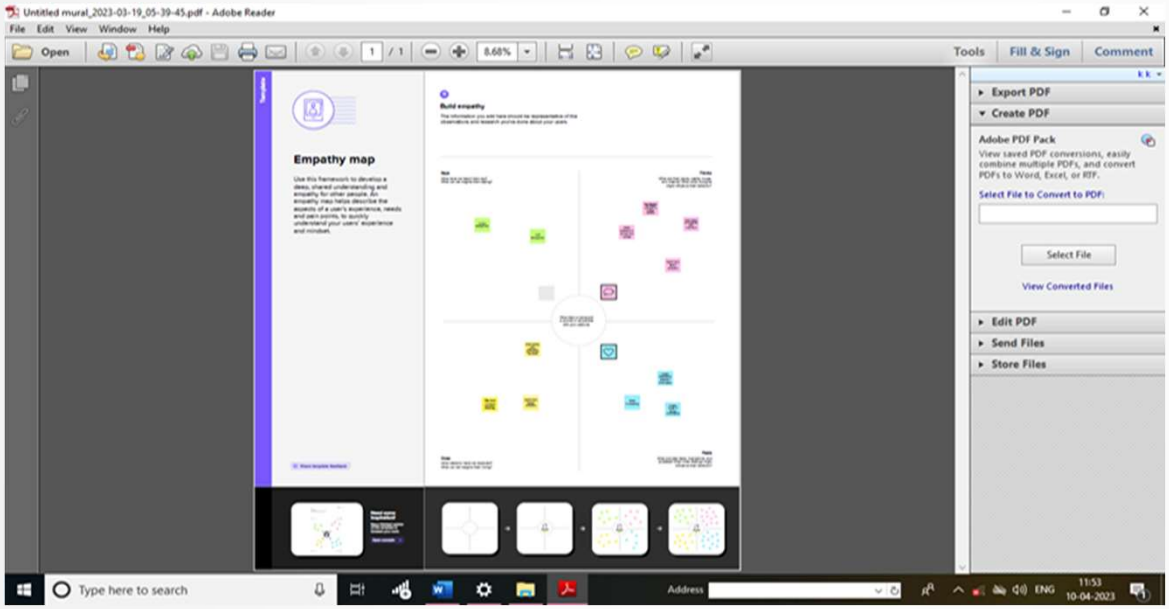
Introduction

Salesforce is your 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 prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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 to their resume as well. Customer Relationship Management (CRM) systems are similar to Enterprice Resource Planning (ERP) applications, though they focus more on the customer and communication side of operation. CRM keeps track of every activity of the students on their websites.

Empathy Map


Untitled mural_2023-03-19_05-39-45.pdf - Adobe Reader
File Edit View Window Help
Open
Tools
Fill & Sign
Comment
Empathy map
Build empathy
Export PDF
Create PDF
Adobe PDF Pack
View saved PDF conversions, easily combine multiple PDFs, and convert PDFs to Word, Excel, or RTF.
Select File to Convert to PDF:
Select File
View Converted Files
Edit PDF
Send Files
Store Files
Type here to search
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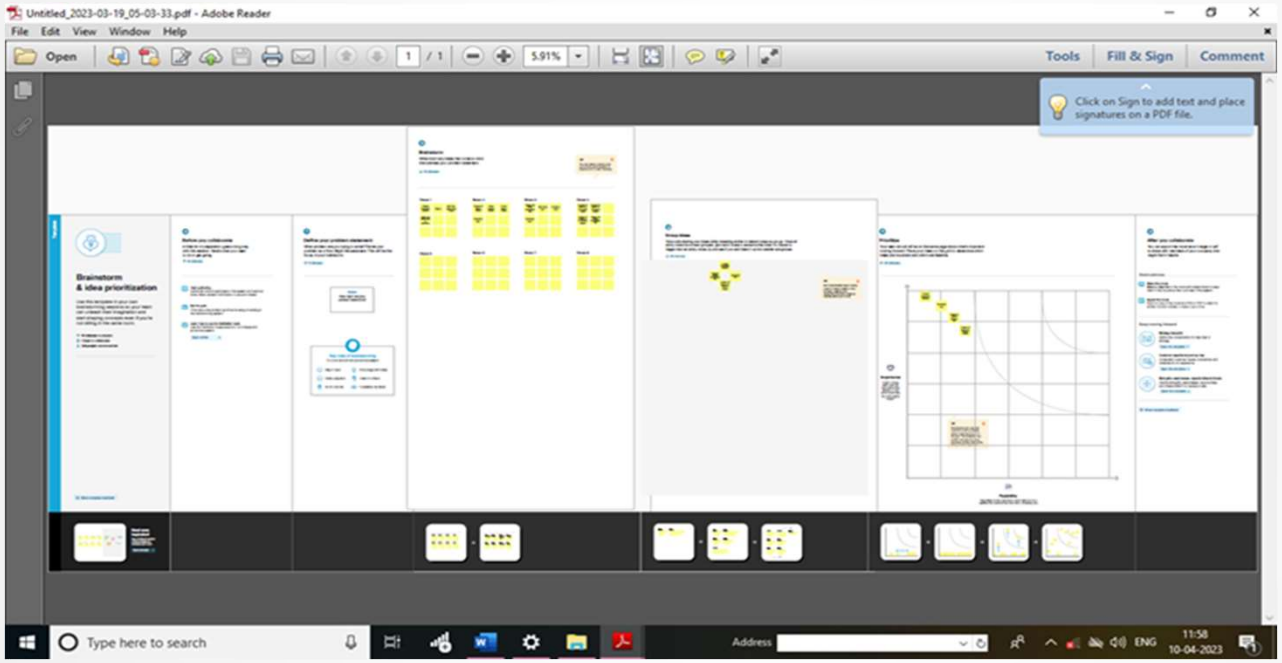
Ideation & Brainstorming Map



Creating Developer Account

Creating a developer org in salesforce.

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

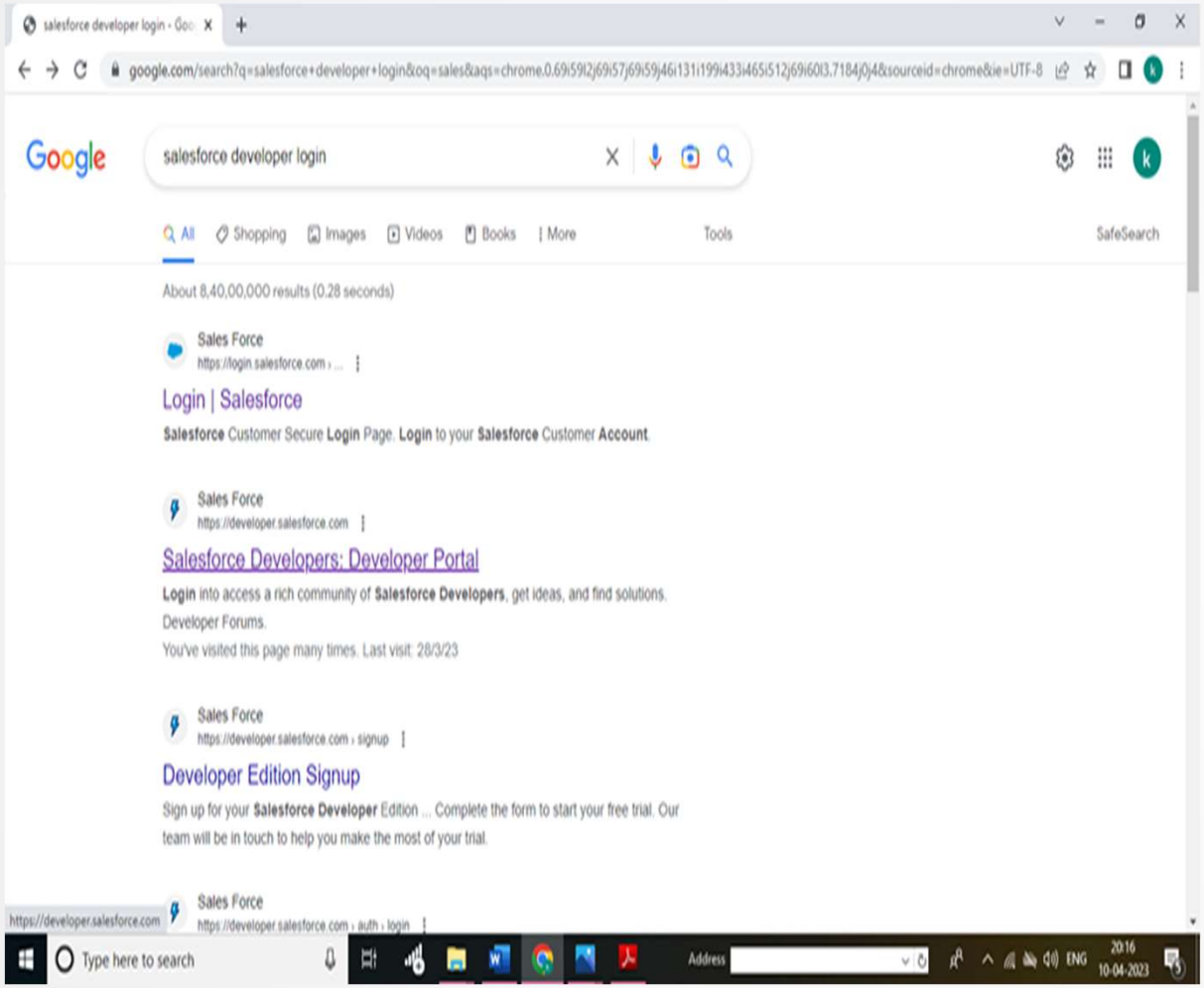
c. Company : College Name

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


salesforce developer login - Goo
google.com/search?q=salesforce+developer+login&oq=sales&aqs=chrome.0.69i59l2j69i57j69i59j46i131i199i433i465i512j69i60l3.7184j0j4&sourceid=chrome&ie=UTF-8
Google
salesforce developer login
All
Shopping
Images
Videos
Books
More
Tools
SafeSearch
About 8,40,00,000 results (0.28 seconds)
Sales Force
https://login.salesforce.com › ...
Login | Salesforce
Salesforce Customer Secure Login Page. Login to your Salesforce Customer Account.
Sales Force
https://developer.salesforce.com
Salesforce Developers: Developer Portal
Login into access a rich community of Salesforce Developers, get ideas, and find solutions.
Developer Forums.
You've visited this page many times. Last visit: 28/3/23
Sales Force
https://developer.salesforce.com › signup
Developer Edition Signup
Sign up for your Salesforce Developer Edition ... Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.
Sales Force
https://developer.salesforce.com › auth › login
https://developer.salesforce.com
Type here to search
Address
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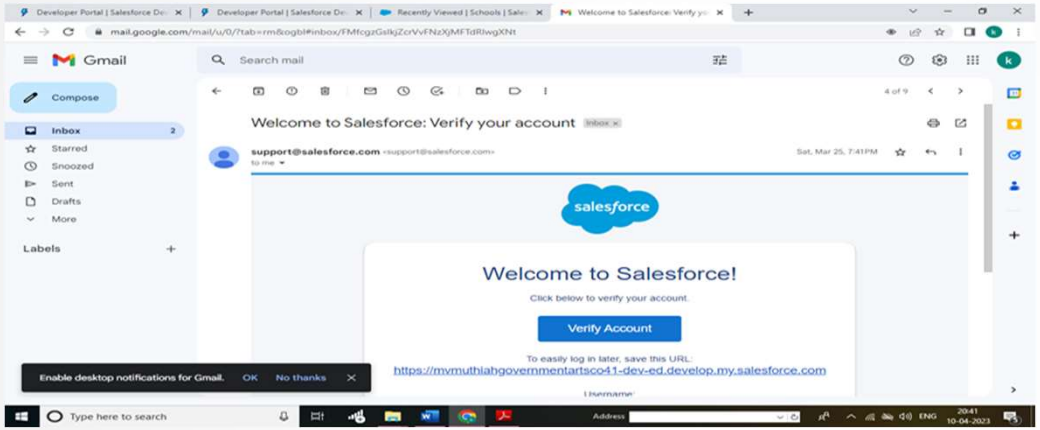
10-04-2023

Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your
account. The email may take 5-10mins, as

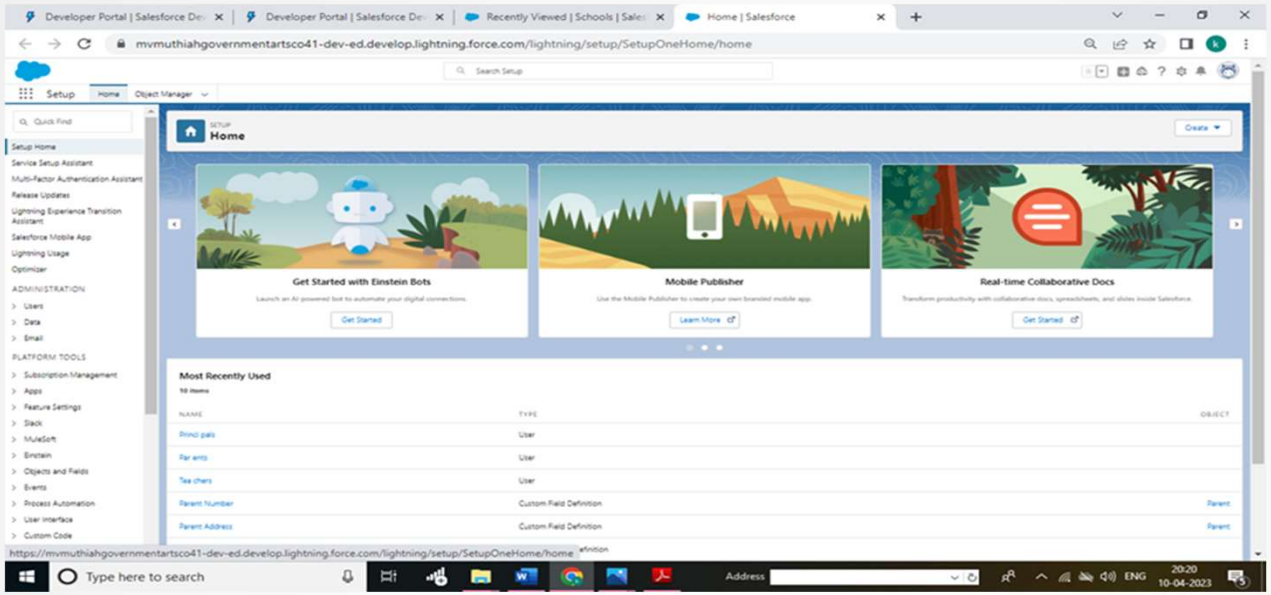


Login To Your Salesforce Account

1.Go to salesforce.com and click on login.

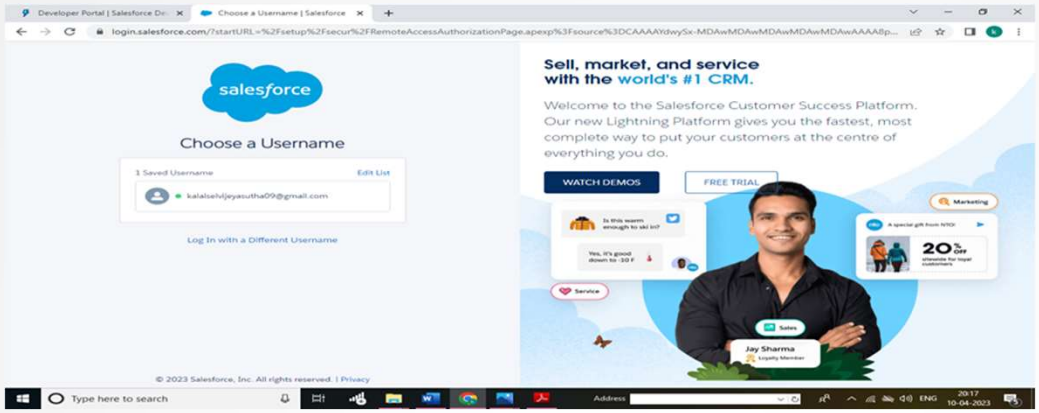
2.Enter the username and password that you just created.

3.After login this is the home page which you will see.



Salesforce Login

htttps://login.salesforce.com



Object

Creation of School Object

Creation of Objects for School Management:

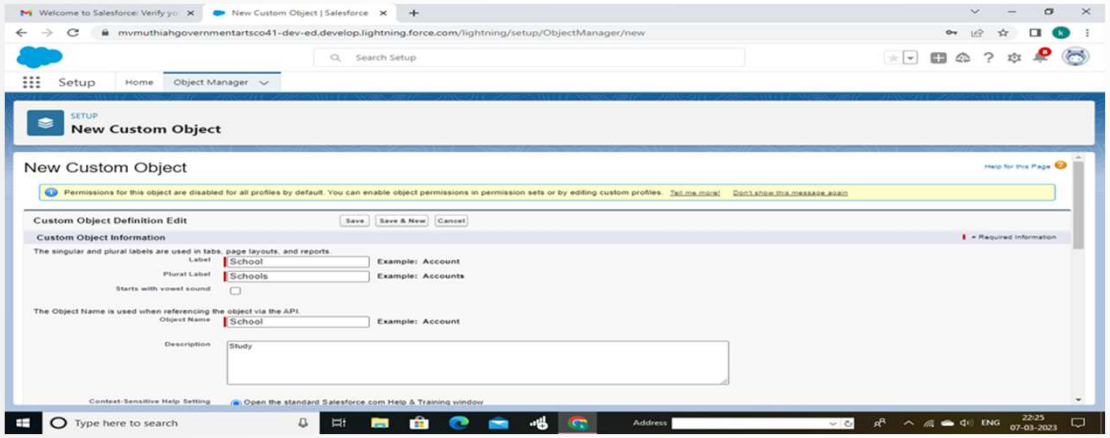
For this school management we need to create 3 objects i.e school , parents and students.

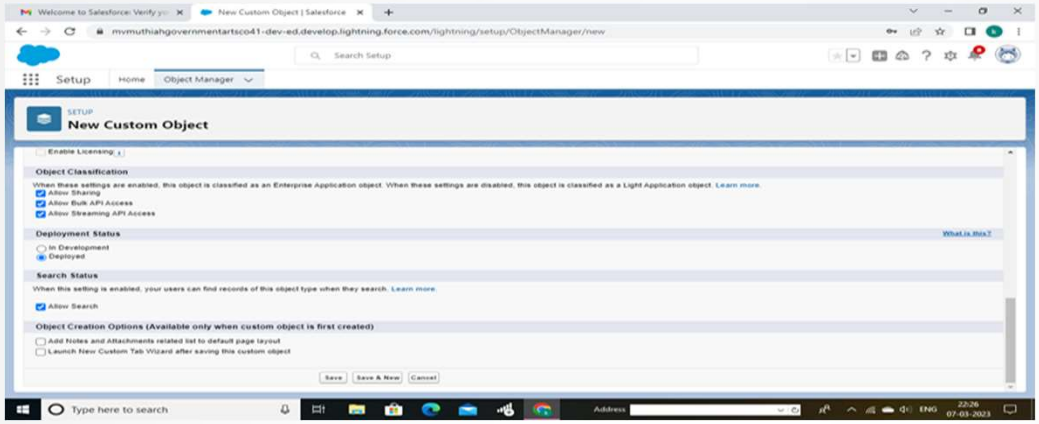
The below steps will assist you in creating those objects.

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.

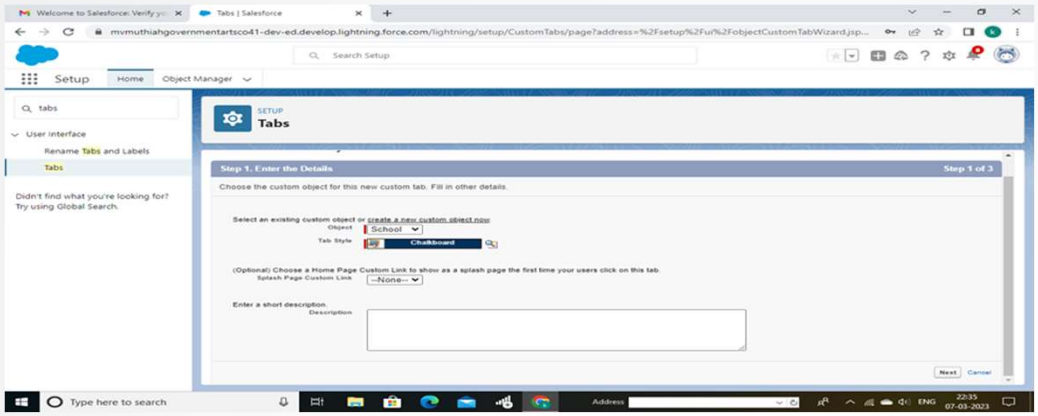
- On the Custom Object Definition page, create the object as follows:
- Label: School
- Plural Label: Schools
- Record Name: School Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.





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.



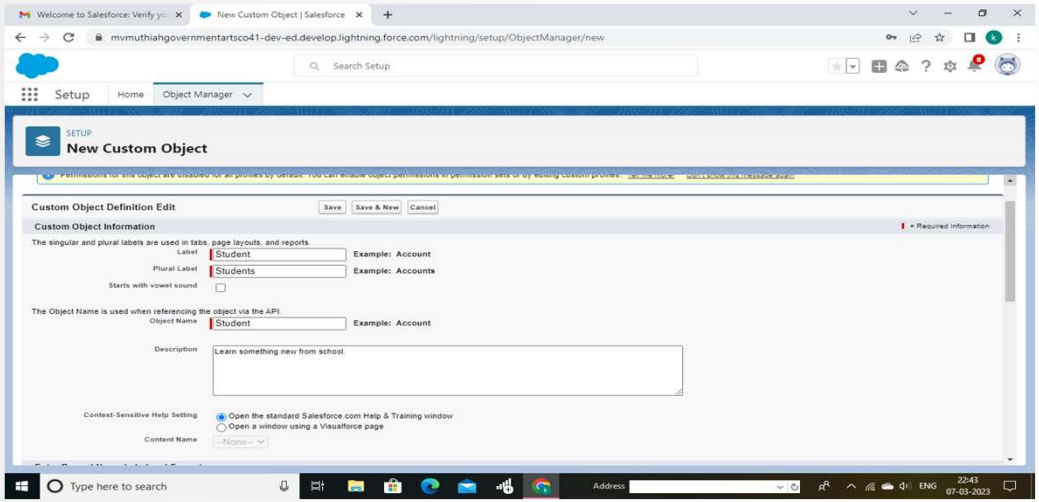
Activity 2: Create student object

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.

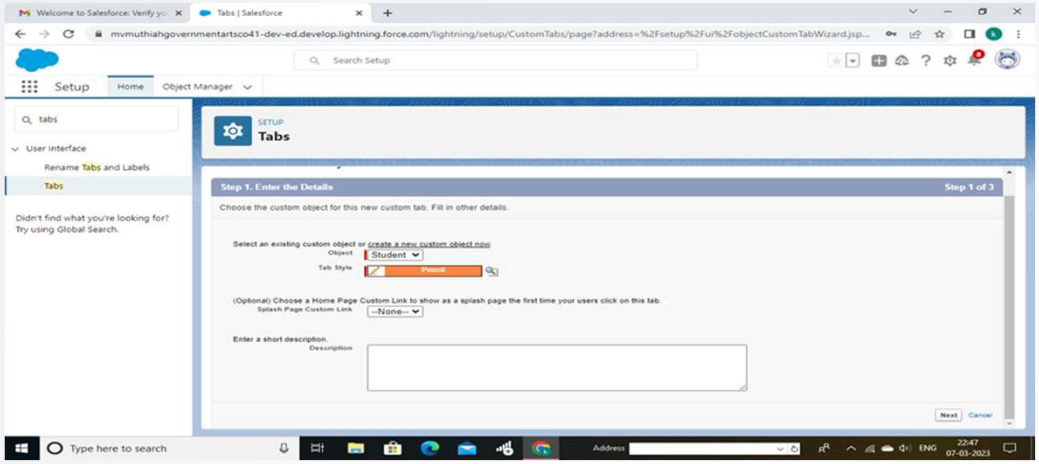
- On the Custom Object Definition page, create the object as follows:
- Label: Students
- Plural Label: Students
- Record Name: Student Name
- Check the Allow Reports checkbox

- 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.

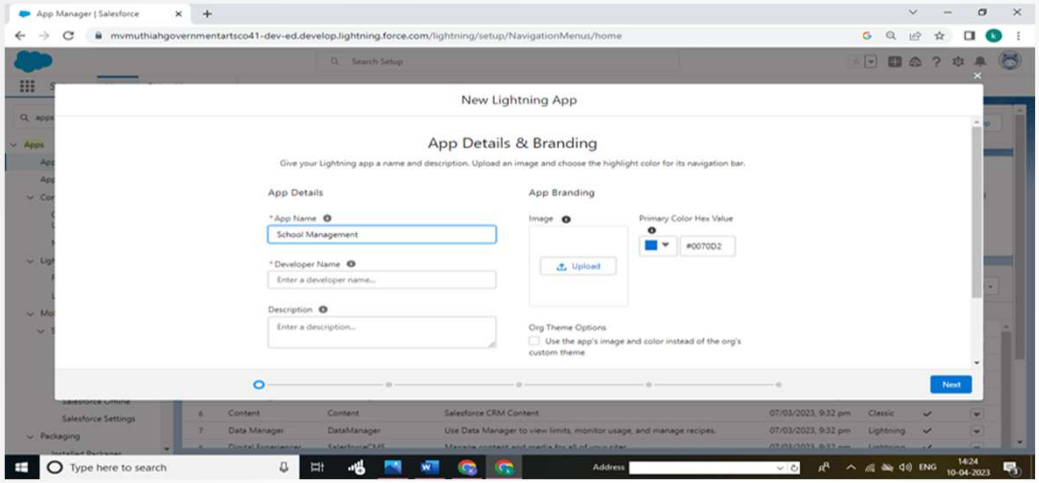
Lightning App

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

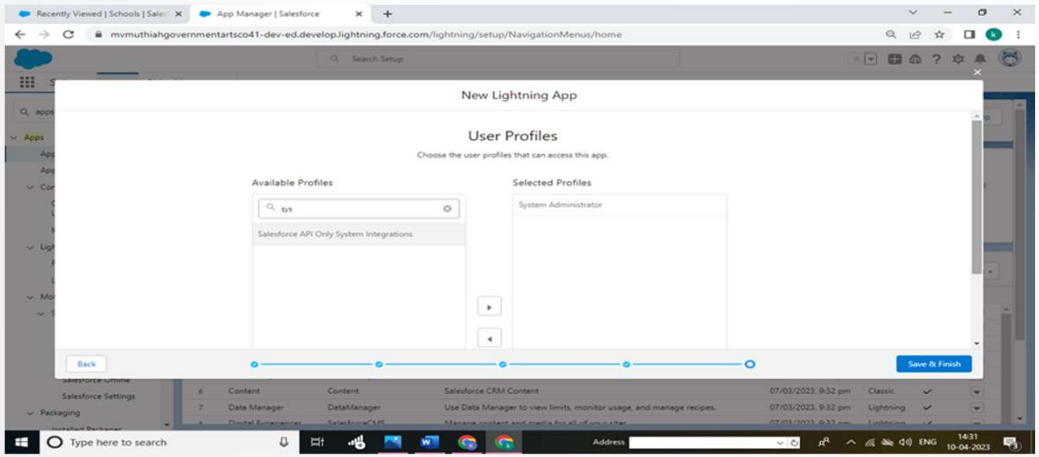
Activity:

Create the School Management app

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



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.

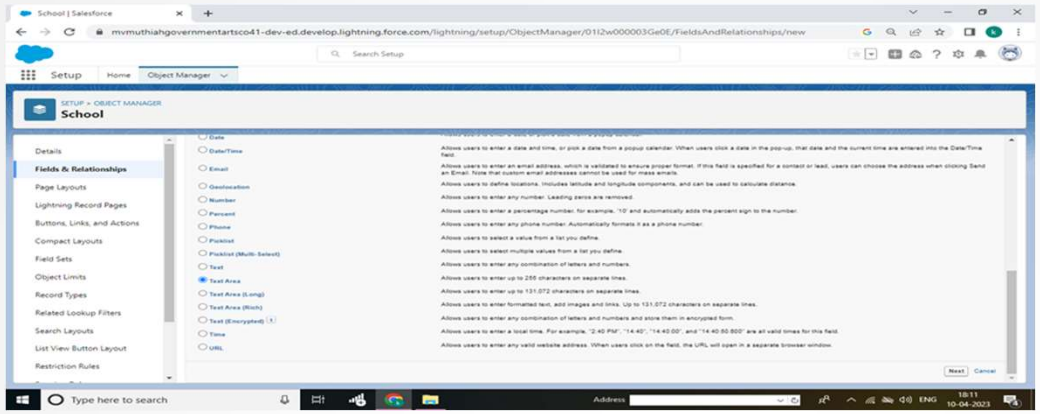
Activity-1:

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
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


School | Salesforce
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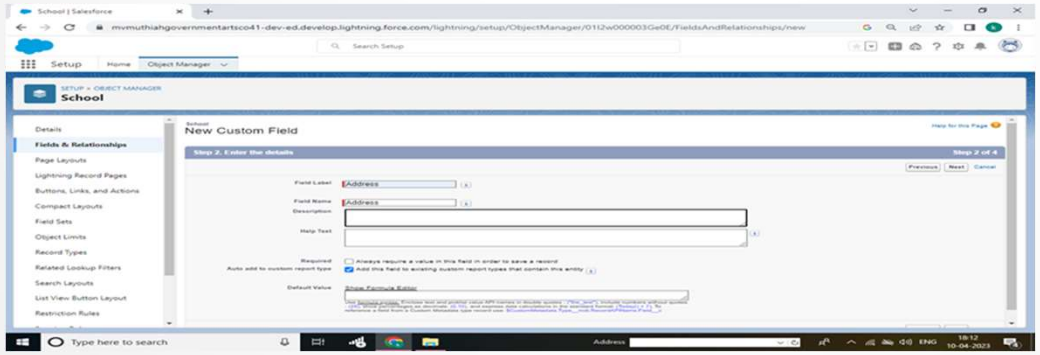
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
School
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Next
Cancel
Type here to search


School | Salesforce
mvmuthiahgovernmentartsco41-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003GeOE/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
School
New Custom Field
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Field Name
Description
Help Text
Required
Default Value
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Type here to search

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.

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.

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

Profile

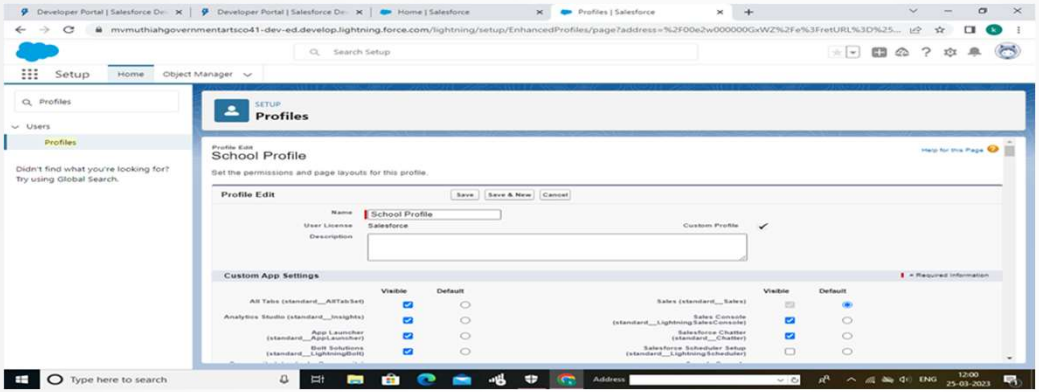
A profile is **a group/collection of settings and permissions that define what a user can do in salesforce**. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours &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

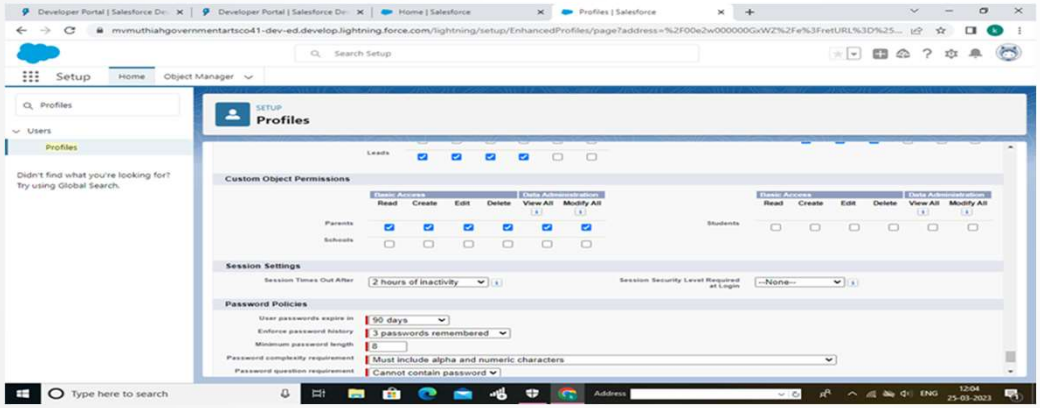
Activity:

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


Setup
Home
Object Manager
Profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile Edit
School Profile
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
School Profile
User License
Salesforce
Custom Profile
Description
Custom App Settings
Visible
Default
Type here to search


Setup
Home
Object Manager
Profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Custom Object Permissions
Read
Create
Edit
Delete
View All
Modify All
Parents
Schools
Students
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Type here to search

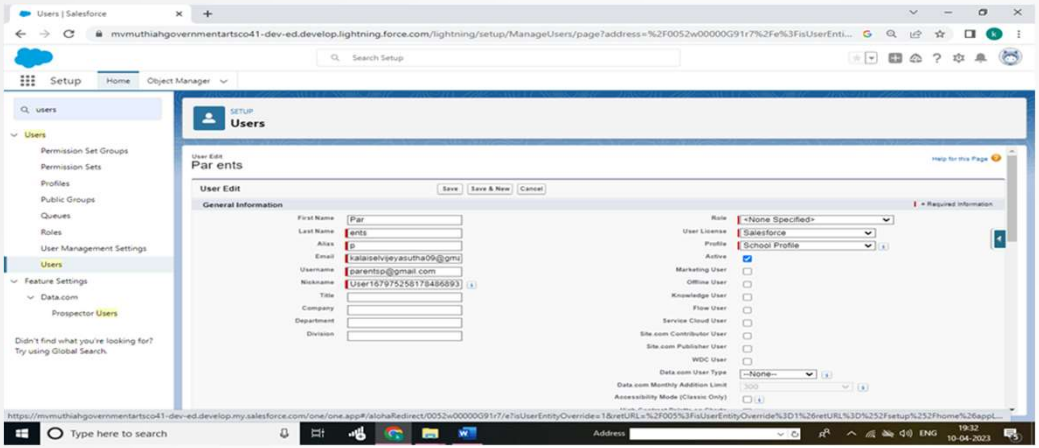
Users

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.



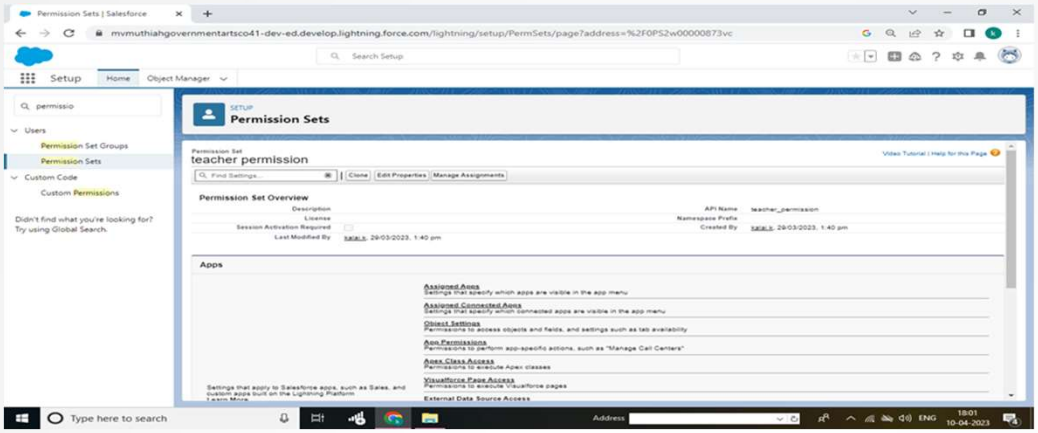
Permission sets

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



Activity-2:

Permission sets 2:

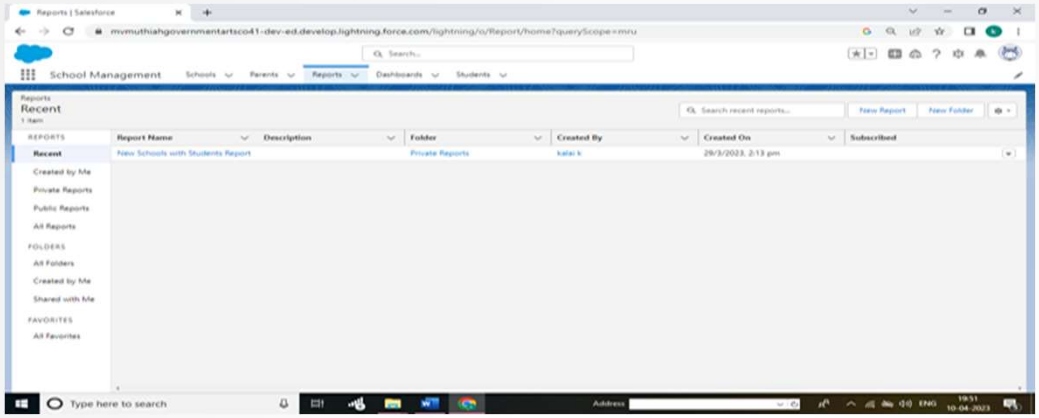
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

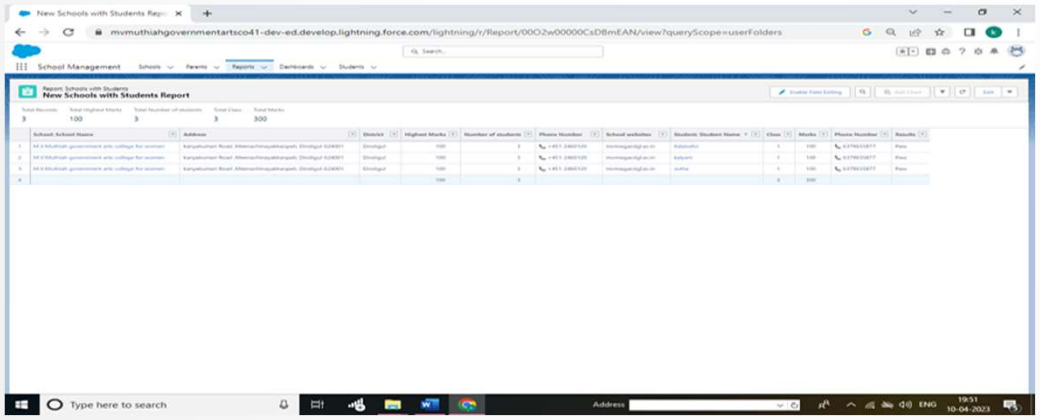
Reports

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.


Reports | Salesforce
mvmuthiahgovernmentartsco41-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
School Management
Schools
Parents
Reports
Dashboards
Students
Reports
Recent
1 item
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
New Schools with Students Report
Private Reports
kalai k
29/3/2023, 2:13 pm
Type here to search
Address
ENG
19:51
10-04-2023


New Schools with Students Rep
mvmuthiahgovernmentartsco41-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000CsDBmEAN/view?queryScope=userFolders
School Management
Schools
Parents
Reports
Dashboards
Students
Report: Schools with Students
New Schools with Students Report
Total Records
3
Total Highest Marks
100
Total Number of students
3
Total Class
3
Total Marks
300
School: School Name
Address
District
Highest Marks
Number of students
Phone Number
School website
Student: Student Name
Class
Marks
Phone Number
Results
Type here to search
Address
ENG
19:51
10-04-2023

CONCLUSION

CRM systems are most commonly used for recruitment and admissions with 57% of institutions using the CRM systems for both processes.

Smaller institutions tend to use a proprietary CRM system more often than existing standard systems.

It is impossible to recommend any system in particular, as every system in this report comes with unique functionalities that different institutions might find useful.

THANK YOU