Smart Internz
Project Report Template

1 INTRODUCTION

1.1 Overview

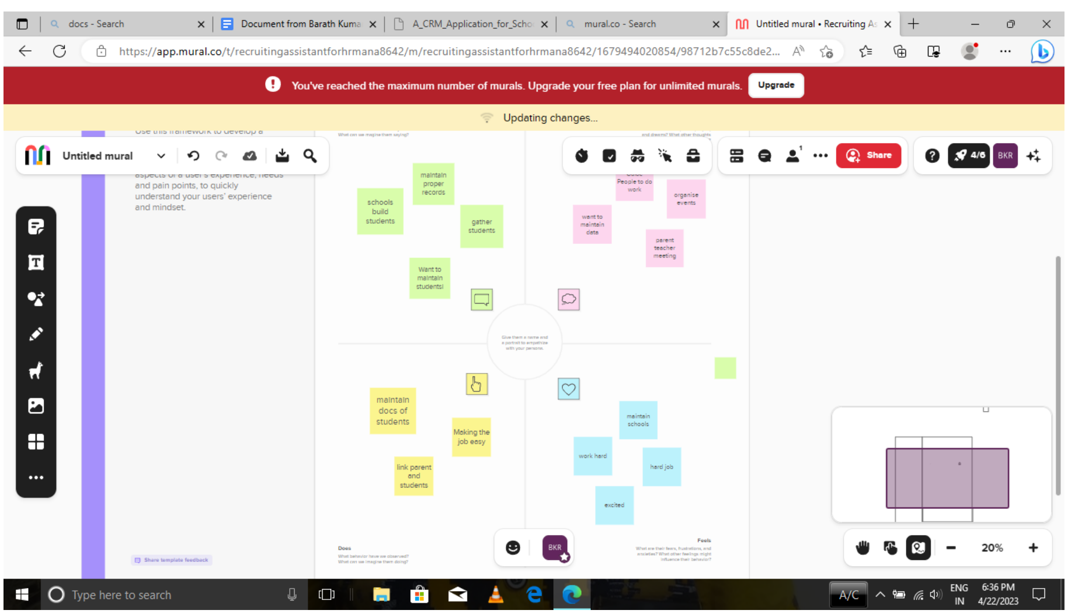
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain 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.

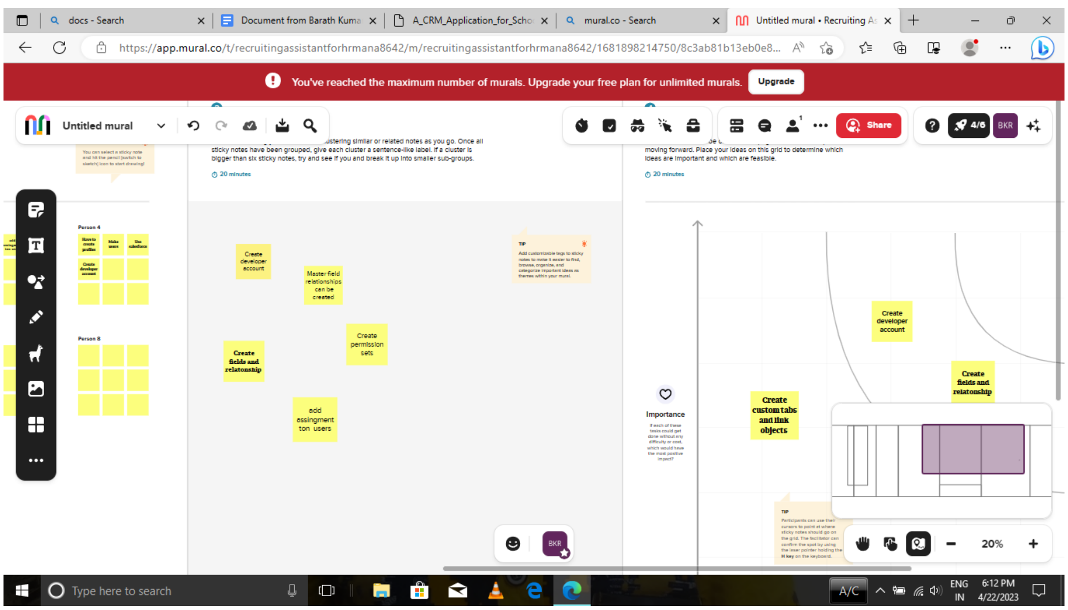
2 Problem Definition & Design Thinking

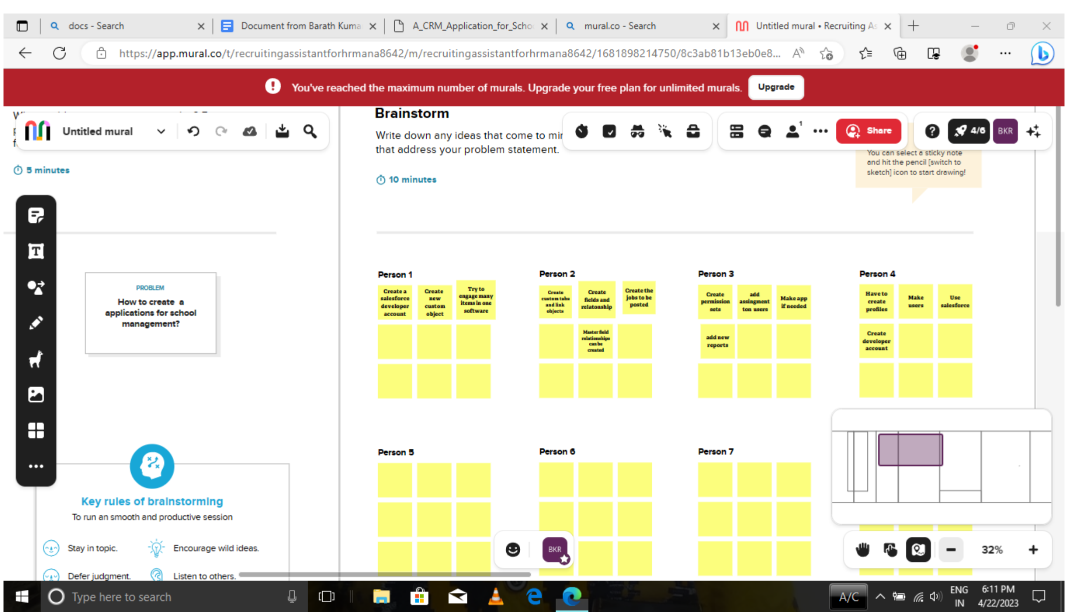
2.1 Empathy Map



2.2 Ideation & Brainstorming Map

Project Report Template





3 RESULT

3.1 Data Model:

Object name	Fields in the Object
School	<table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Address</td><td>Text area</td></tr><tr><td>District</td><td>Text area</td></tr><tr><td>State</td><td>Text area</td></tr><tr><td>School websites</td><td>Text area</td></tr><tr><td>Phone number</td><td>Phone</td></tr><tr><td>Highest marks</td><td>Roll up summary</td></tr><tr><td>Number of students</td><td>Roll up summary</td></tr></table>
Student	<table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Phone</td><td>Phone number</td></tr><tr><td>School</td><td>Master field relationship</td></tr><tr><td>Results</td><td>Pickup List</td></tr><tr><td>Class</td><td>Number</td></tr></table>
Parent	<table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Parent Address</td><td>Text area</td></tr></table>

3.2 Activity & Screenshot

Milestone-1:

Activity :Creating Developer Account 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 Click on sign up after filling these. 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 Milestone-2:Object

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. 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 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

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. ● To verify your changes, click the App Launcher, type School Management and select the School Management app.

Milestone -4:Fields and Relationship

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

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

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

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 Trailhead Profile Public URL

Team Lead - https://trailblazer.me/id/manoj420
Team Member 1 - http://trailblazer.me/id/faizr1
Team Member 2 - http://trailblazer.me/id/pravm40
Team Member 3 – http://trailblazer.me/id/jayaj35

5 ADVANTAGES & DISADVANTAGE

Better Knowledge of Customers: Customer Relationship Management is a customer-centric technique. The main focus of CRM technique is on the customers of Business. It helps businesses to acquire all required information of customers. This information is then stored and used for understanding customer behavior.

Retain More Customers: It not only focuses on understanding and serving the existing customers of businesses. CRM aims at acquiring more and more customers for businesses. It targets to increase the customer base & retain them for the long term. Through CRM, a communication channel is developed between customers and business which acquires all information regarding customers.

Better Segmentation: CRM enables businesses in the proper segmentation of market audiences in a systematic way. It collects and supplies all required information regarding potential customers which helps in classifying them according to their interests and criteria. CRM helps in creating groups of audience according to

categories and thereby planning specific customer marketing campaigns.

Minimizes Cost: Cost-effective is one of the major advantages of CRM to business. It helps in reducing cost associated with several processes in many ways. Firstly it reduces all the paperwork involved in different processes. All data is stored digitally on the database. Also, it reduces the manual work to be done in businesses. This leads to a decrease in staff requirements for manual work

- **Costly: Implementation of CRM system requires huge cost to be spent by the business. CRM software are too costly as it came with different price packages as per the needs of organizations. It increases the overall expenses of business and may not be suitable for small businesses.**
- **Training: For proper functioning of CRM, trained and qualified staff is required. It takes a huge cost and time for providing training to employees regarding CRM systems. They need to learn and acquire information regarding CRM software for a proper understanding of it. All this takes large efforts both in terms of money and time on the part of the organization.**
- **Security Issues: Another major drawback with CRM is the insecurity of data collected and stored. All of the data collected is stored at one centralized location which has a threat of being lost or hacked by someone. Employees may add inaccurate data or manipulate figures leading to wrongful planning.**

APPLICATIONS

**Speed to Lead– A measure of how soon your staff members are following up with new leads once they enter the system. Meetings Outcome– A summary of any meetings your staff have held with leads.
Leads with no Scheduled Follow-up– A quick view of any leads for whom no follow-up activities (calls, meetings, emails, etc.) have been scheduled, sorted by lead owner. Leads by Stage– All leads segmented by admissions stage showing the percentage and number of each.
Leads by Program– All leads segmented by program of interest (if known) showing the percentage and number of each.
Leads by Source– All leads attributed to their original source (e.g. organic website traffic, paid advertising campaigns, online sources etc.) showing the percentage and number of each.
Lead Status– Leads segmented by status (Hot, Warm, Cold, Not Interested, Not Applicable).
Lead Conversion– Details how many of your leads have been successfully contacted, held a meeting, made an application, or enrolled with your school over a given period of time.
Calls Outcome-All calls made by specific outcome (Connected, Busy, No Answer, etc.).Admissions Activities Summary– A summary of all follow-up actions taken by your admissions staff (calls held, meetings, emails sent, etc.).**

6 CONCLUSION

We create developer account. Create custom objects, fields, profiles, users reports

7 FUTURE SCOPE

CRM is predicted to become **more powerful to support customer first**, not company first businesses. Bringing together disparate teams, data, and system integrations, the CRM of the future is set to be centralized and empowered by AI and mobile capabilities.