

# **A CRM APPLICATION FOR SCHOOL/COLLEGES**

## **1. Introduction:**

### **1.1 Overview**

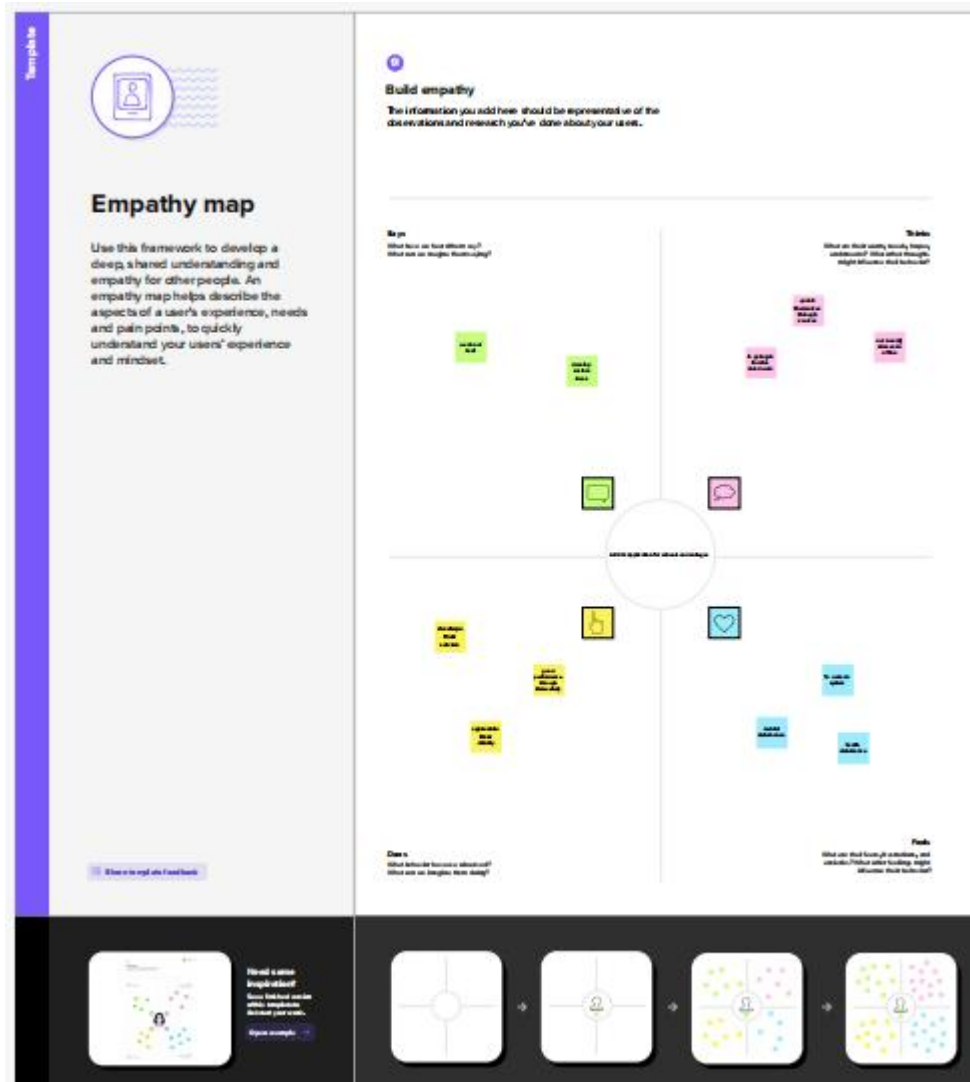
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain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

### **1.2 Purpose**

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

## **2. Problem Definition & Design Thinking**

### **2.1 Empathy Map**



## 2.2 Ideation and Brainstorming Map

1

## Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

PROBLEM

How might we [your problem statement]?



### Key rules of brainstorming

For a smooth and productive session

- Stay in topic.
- Encourage wild ideas.
- Defer judgment.
- Listen to others.
- Go for volume.
- If possible, be visual.

2

## Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

### TIP

You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

#### Person 1

meetings in offline	communicating people through their language	lack of people interaction
notice on people behaviour		

#### Person 2

distraction of people thoughts	lack of compliments	well defined discipline
irect vision on people command		

#### Person 3

prolating them by contact	A clear reference through carvies	Lack of fulfillment
supports can ensured		

#### Person 4

improve the current strategy	necessary of system update	compared other market efficiency
less demand of the product	low cost and good consume	Developing confident statement among customer

### Group Ideas

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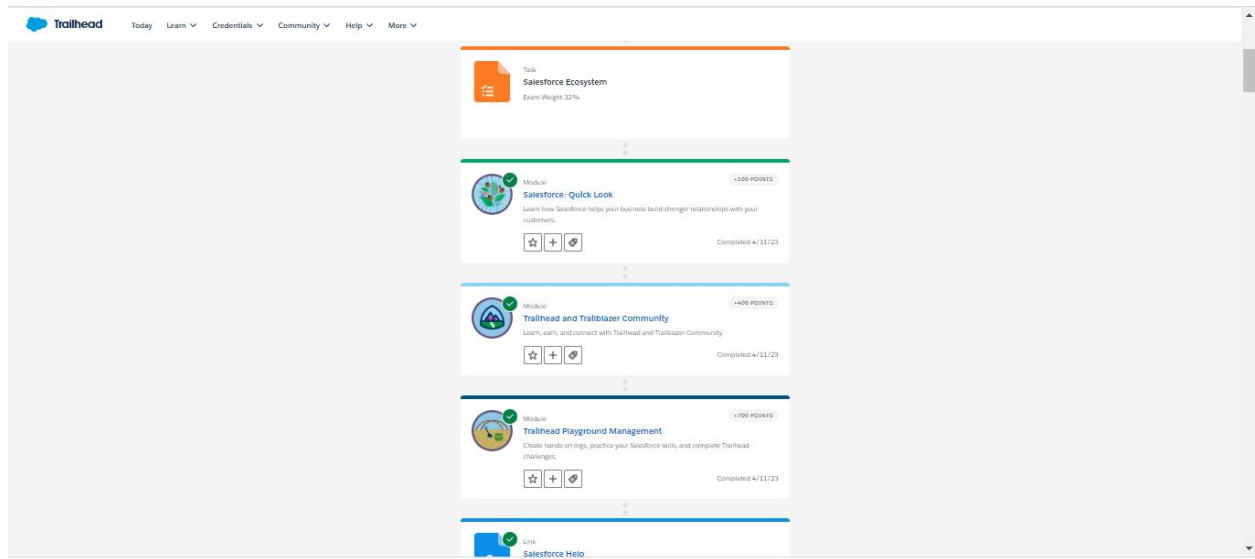


Student	Phone-Number School Results Class	Phone Master-detail relationship Picklist Number
Parent	Parent Address Parent Address	Text Area Phone

### 3.2 Activity & Screenshot

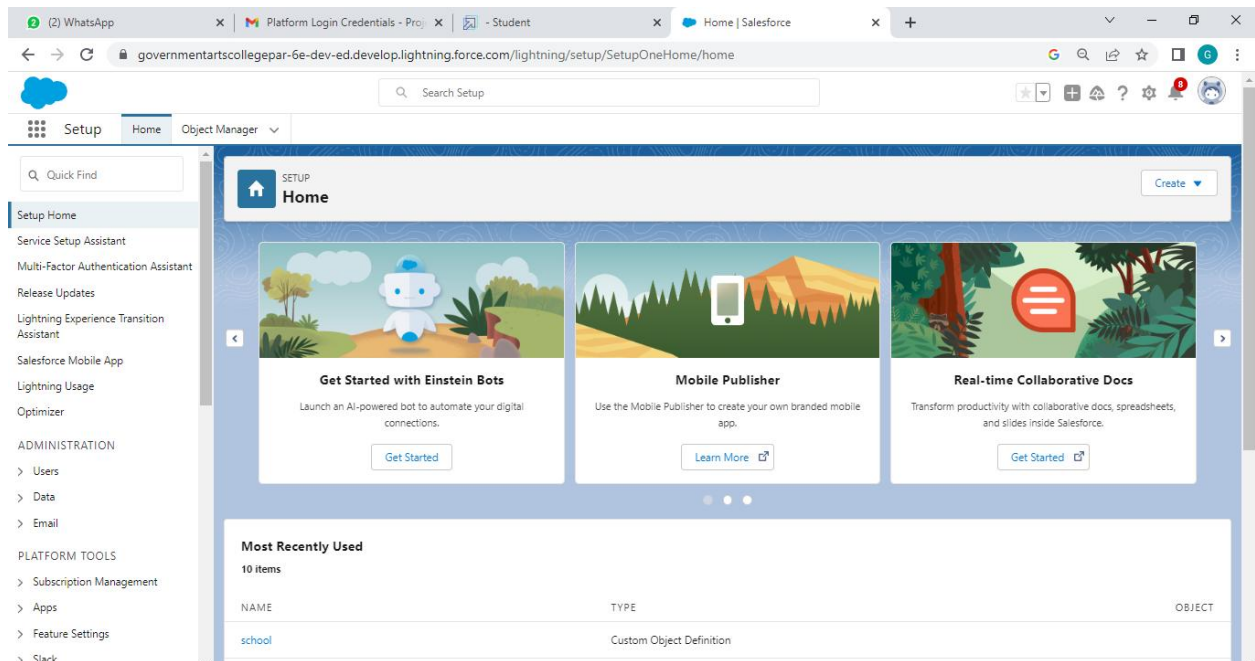
We done empathy map and brain storming and uploaded in Github. Also we done the trailhead badges completion and earn points.

The screenshot shows the Trailhead website interface. At the top, there's a navigation bar with the Trailhead logo and links for Today, Learn, Credentials, Community, Help, and More. Below the navigation bar, there's a banner for a trailmix titled "Prepare for Your Salesforce Certified Associate Credential" by Salesforce Trailhead. The banner includes a description: "Preparing for your Salesforce Certified Associate credential? Check out this trailmix that has been curated to help you get exam ready!" and shows a progress bar indicating 56% completion with 14 hours and 58 minutes left. Below the banner, there's a card titled "Salesforce Certified Associate Exam Overview" with a link icon and a green checkmark, indicating it has been completed on 4/12/23. The card also mentions "Exam Guide, Scheduling your Exam, Recommended Courses, and Quick Facts."



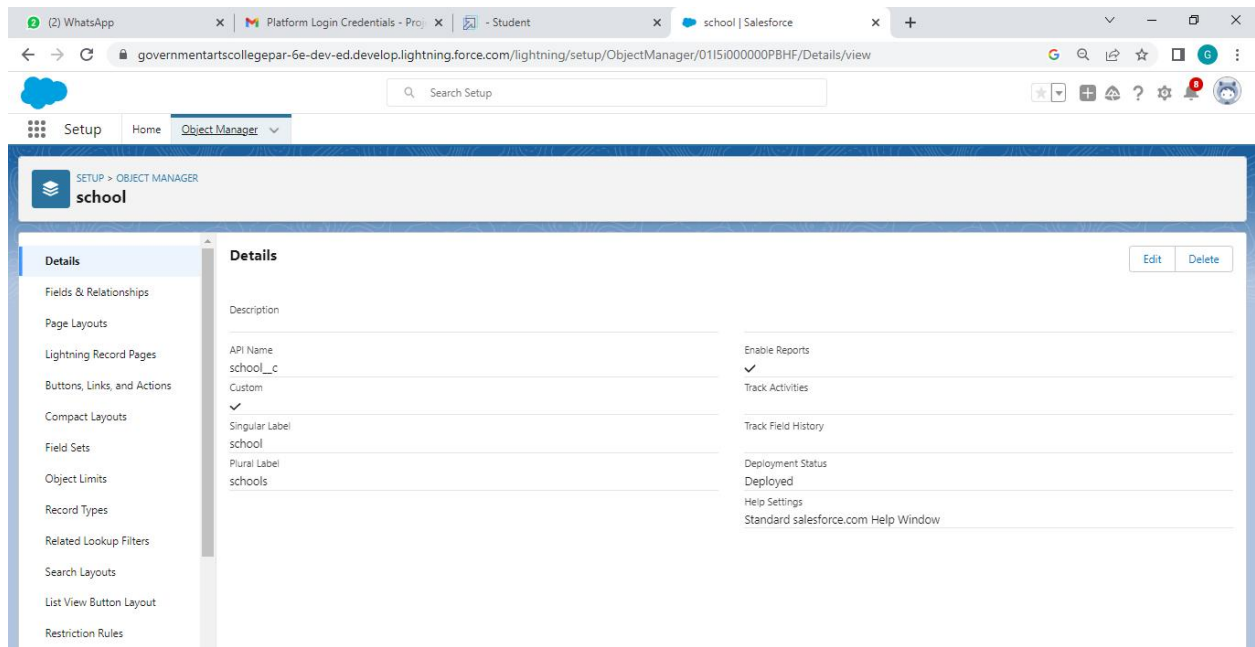
## Project screenshots

### Milestone 1

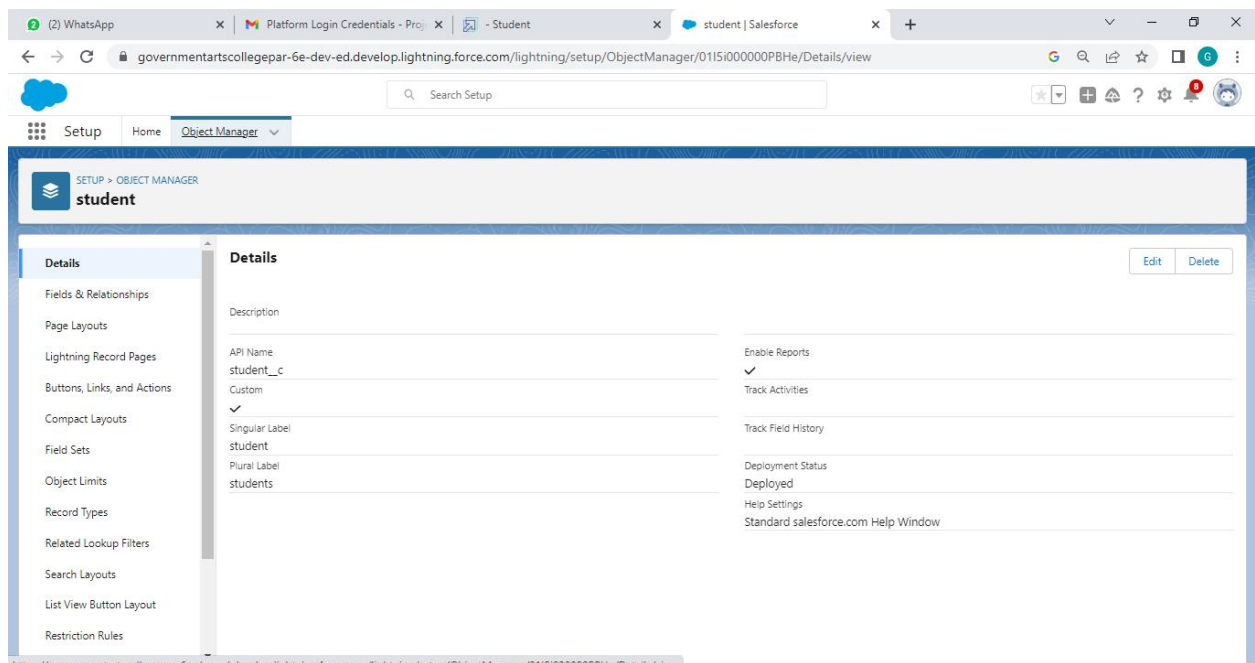


### Mile stone 2

#### Activity 1

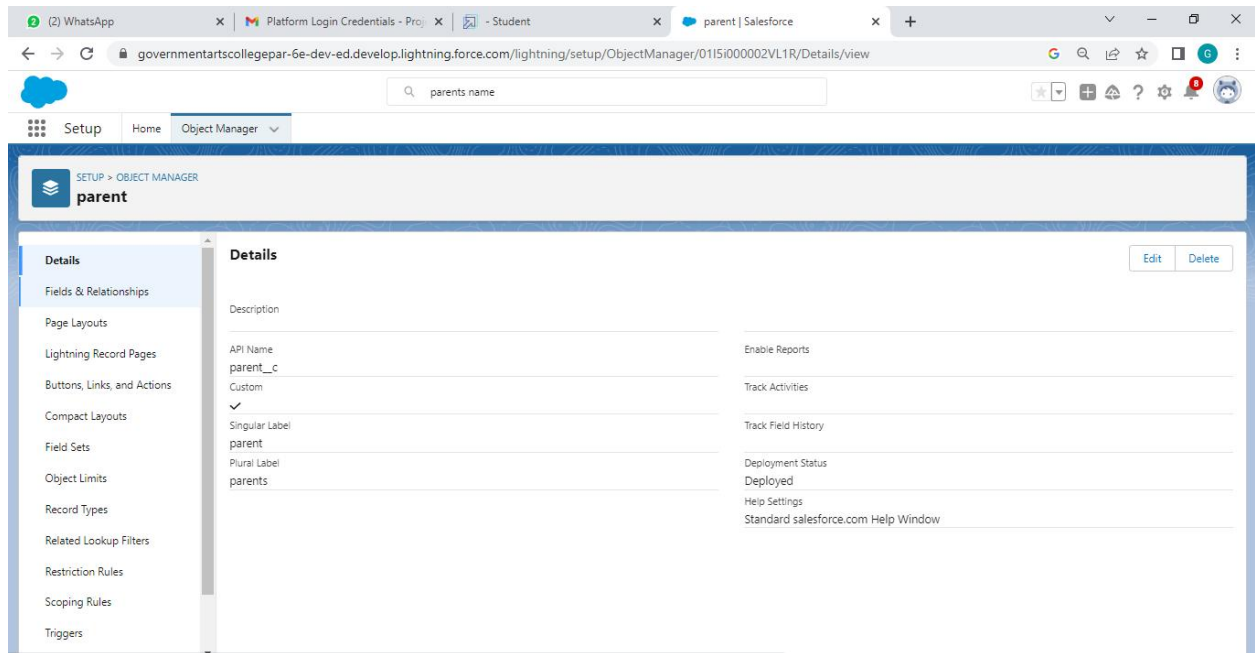


## Activity 2



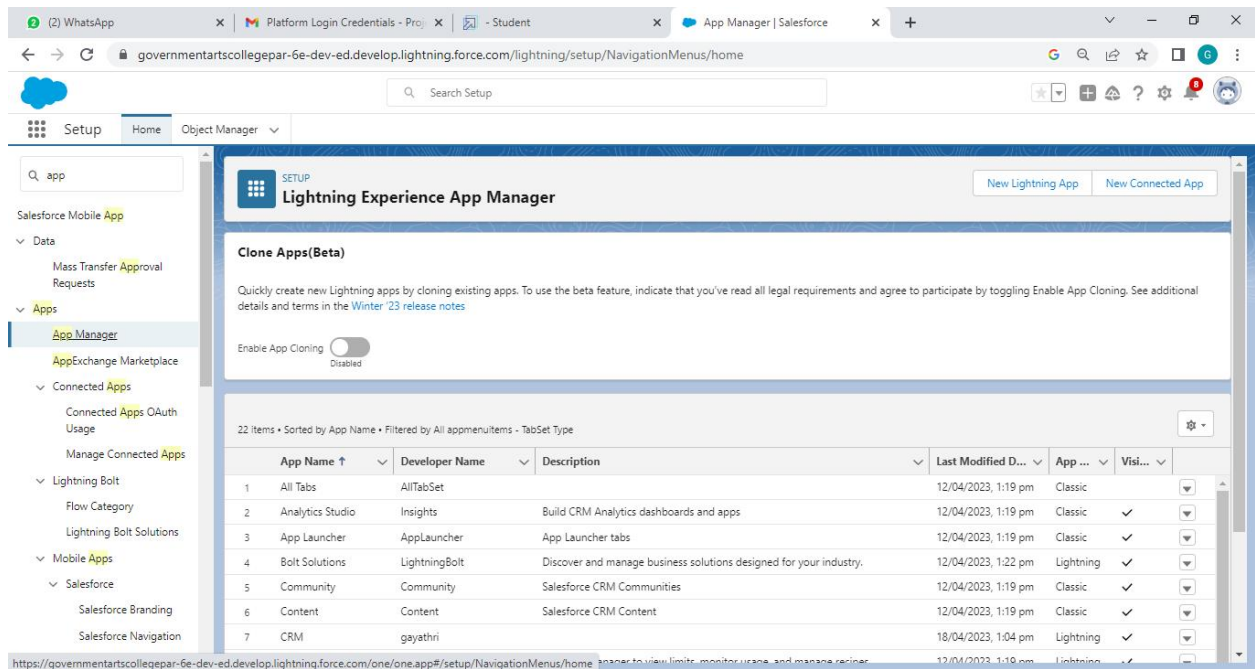
## Activity 3





## Milestone 3

### Lightning experience manager



## Milestone 4 Fields & Relationship

### Activity 1

Screenshot of the Salesforce Setup page for the 'school' object. The browser tabs include '(2) WhatsApp', 'Platform Login Credentials - Proj', '- Student', and 'school | Salesforce'. The URL is 'governmentartscollegepar-6e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000PBHF/Details/view'. The page shows the 'Details' section for the 'school' object, with a sidebar menu on the left containing options like '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', and 'Restriction Rules'. The main content area displays the following details:

Details	
Description	
API Name	school__c
Custom	✓
Singular Label	school
Plural Label	schools
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## Activity 2

Screenshot of the Salesforce Setup page for the 'student' object. The browser tabs include '(2) WhatsApp', 'Platform Login Credentials - Proj', '- Student', and 'student | Salesforce'. The URL is 'governmentartscollegepar-6e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000PBHe/Details/view'. The page shows the 'Details' section for the 'student' object, with a sidebar menu on the left containing options like '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', and 'Restriction Rules'. The main content area displays the following details:

Details	
Description	
API Name	student__c
Custom	✓
Singular Label	student
Plural Label	students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## Activity 3

Screenshot of the Salesforce Object Manager interface for the 'parent' object. The browser tabs include (2) WhatsApp, Platform Login Credentials - Proj..., - Student, and parent | Salesforce. The URL is governmentartscollegepar-6e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i00002VL1R/Details/view. The page shows the 'parent' object details, including API Name (parent\_c), Custom, Singular Label (parent), Plural Label (parents), and various settings like Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window).

## Milestone 5 Profile

Screenshot of the Salesforce Profiles interface for the 'school profile' profile. The browser tabs include (2) WhatsApp, Platform Login Credentials - Proj..., - Student, and Profiles | Salesforce. The URL is governmentartscollegepar-6e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5i000000hvJIAA%3FretURL%3D... The page shows the 'school profile' details, including Name (school profile), User License (Salesforce), Description, Created By (Gayathri K.H.), Modified By (Gayathri K.H.), and various settings like Edit, Clone, Delete, View Users, and Page Layouts.

## Milestone 6 User

**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](#)

View: **All Users** | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter, Robert	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	J. John	J. John	parents123@acme.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	J. John	J. John	teacher123@acme.com		<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	J. John	J. John	principal123@acme.com		<input checked="" type="checkbox"/>	Identity User
<input type="checkbox"/> Edit	K. H. Gavathi	K. H. Gavathi	gavathi@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	intgr	integration@00000000000000000000000000000000@acme.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00000000000000000000000000000000@acme.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## Milestone 7

**Permission Sets**

On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

**All Permission Sets** | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers t...	Service Cloud Voice User
<input type="checkbox"/> Clone	Europe Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<input type="checkbox"/> Clone	Field Service Mobile Standard PermSet	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seats
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User

## Activity 1 – permission set [teacher permission]

The screenshot shows the Salesforce Setup interface for a permission set named "teachers permission". The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the "Permission Set Overview" for "teachers permission".

Permission Set Overview		API Name	teachers_permissions
Description		Namespace Prefix	
License		Created By	Gayathri K.H.
Session Activation Required	<input type="checkbox"/>	Created On	22/04/2023, 12:05 pm
Last Modified By	Gayathri K.H.		22/04/2023, 12:05 pm

Below the overview, there is a section for "Apps" with links to "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", "Apex Class Access", "Visualforce Page Access", and "External Data Source Access".

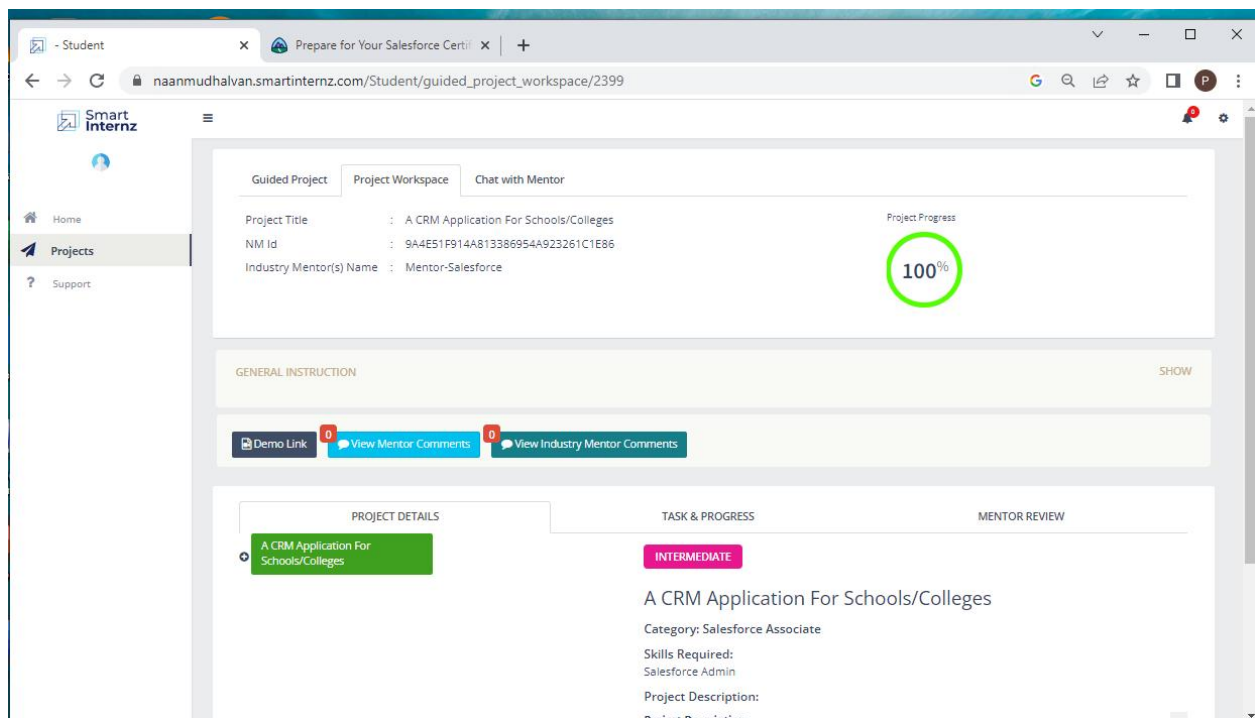
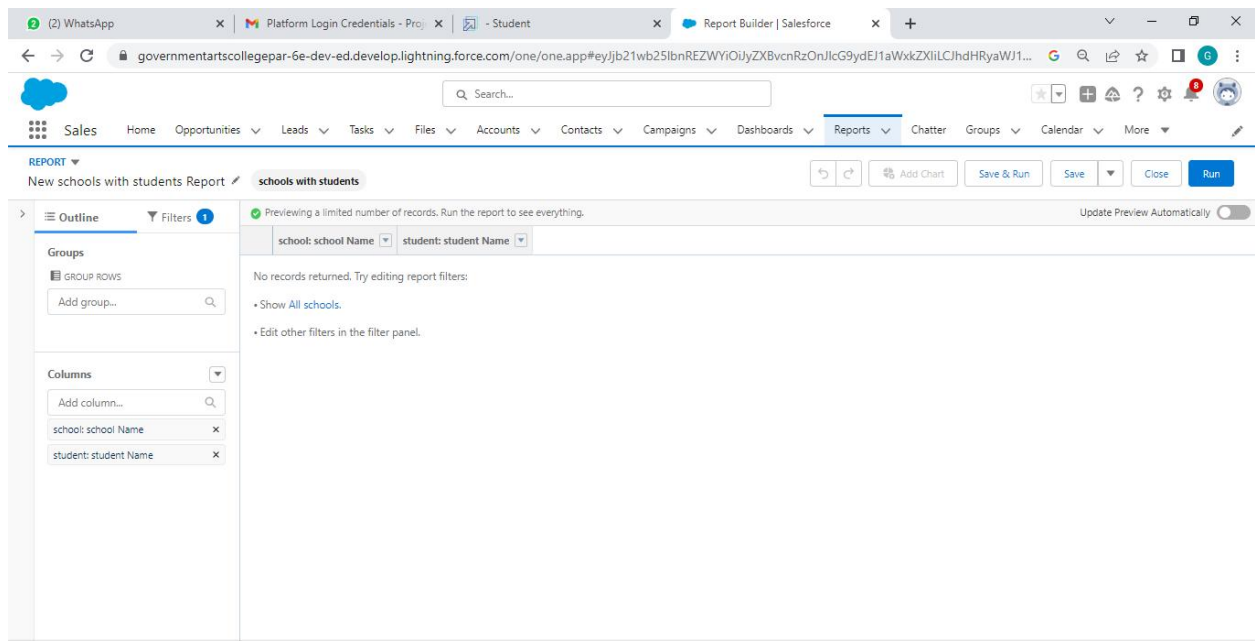
## Activity 2 – Permission set[Principal permission]

The screenshot shows the Salesforce Setup interface for a permission set named "principal permission". The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the "Permission Set Overview" for "principal permission".

Permission Set Overview		API Name	principal_permission
Description		Namespace Prefix	
License		Created By	Gayathri K.H.
Session Activation Required	<input type="checkbox"/>	Created On	22/04/2023, 12:08 pm
Last Modified By	Gayathri K.H.		22/04/2023, 12:08 pm

Below the overview, there is a section for "Apps" with links to "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", "Apex Class Access", "Visualforce Page Access", and "External Data Source Access".

## Milestone 8 – Reports



**Trailhead Profile Public URL**

**Team lead-**



Team Member 1:

Team member 2 – <https://trailblazer.me/id/mytkr>

Team member 3-

#### **4. Advantages & Disadvantages**

##### **Advantages**

- Personalised communication
- Improved enrolments
- Lead management
- Increased revenue
- Automated communication

##### **Disadvantages**

- Record less
- Overhead
- Technical support
- Security issues

#### **5. Applications**

- Banking
- Education
- Insurance and Health care

#### **6. Conclusion**

Salesforce can be used to manage orders from retail stores and distributions, including tracking orders, processing payments, and managing inventory levels.

#### **7. Future Scope**

CRM as a single source of truth, more and deeper automations, customer intelligence is king, keeping customers happy keeps them coming back.