

## **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

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



## Empathy map canvas

Use this framework to empathize a customer, user, or any person who is affected by a team's work. Document and discuss your observations and note your assumptions to gain more empathy for the people you serve.

Overlapping content is placed in overlapping areas.



Downloadable feedback

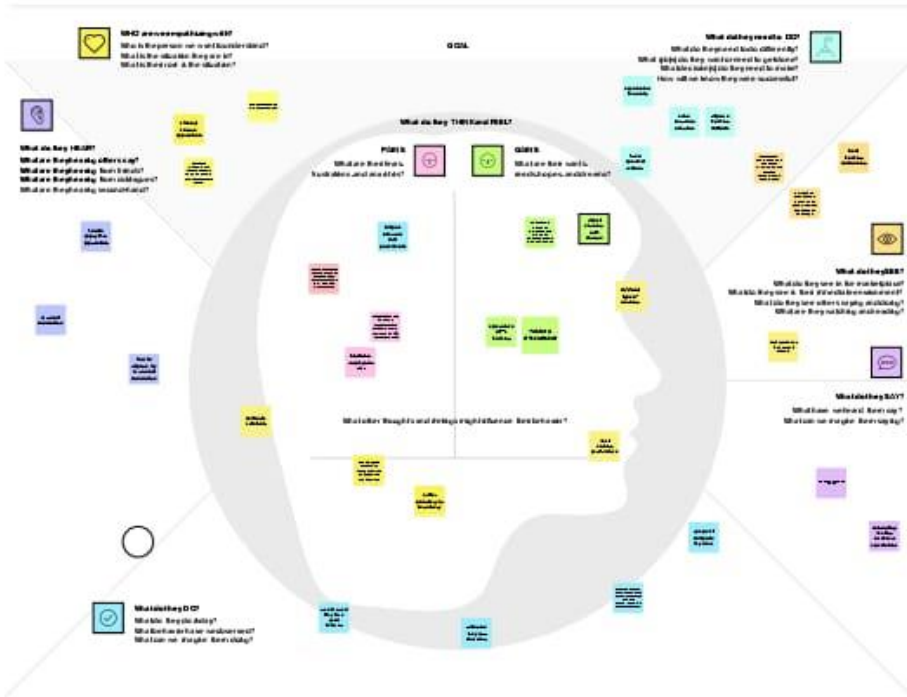


Pinpoint a specific experience?  
See an overlap? Connect all the sticky notes in order of your work.  
Open to learn more.

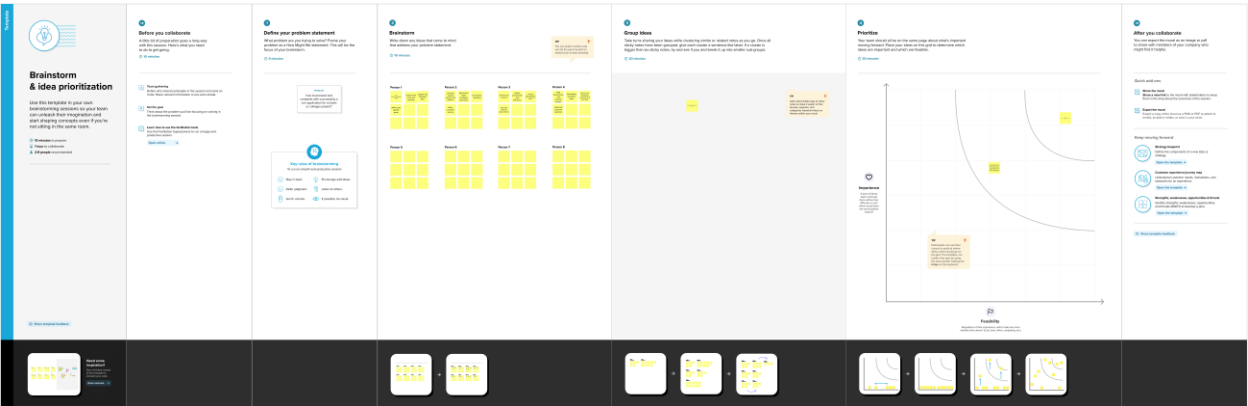
1

### Develop shared understanding and empathy

Summarize the data you have gathered related to the people that are impacted by your work. Use this help you generate ideas, practice behaviors, or discuss decisions.



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object name	Fields in the Object		
School	Field lable	Data type	
	Address	Text Area	
	District	Text Area	
	State	Text Area	
	School	Text Area	
Student	Field lable	Data type	
	Phone Number	Phone	
Parent	Field lable	Data type	
	Parent Address	Text Area	
	Parent Number	Phone	

### 3.2 Activity & Screenshot

#### Milestone-1:

Activity :Creating Developer Account

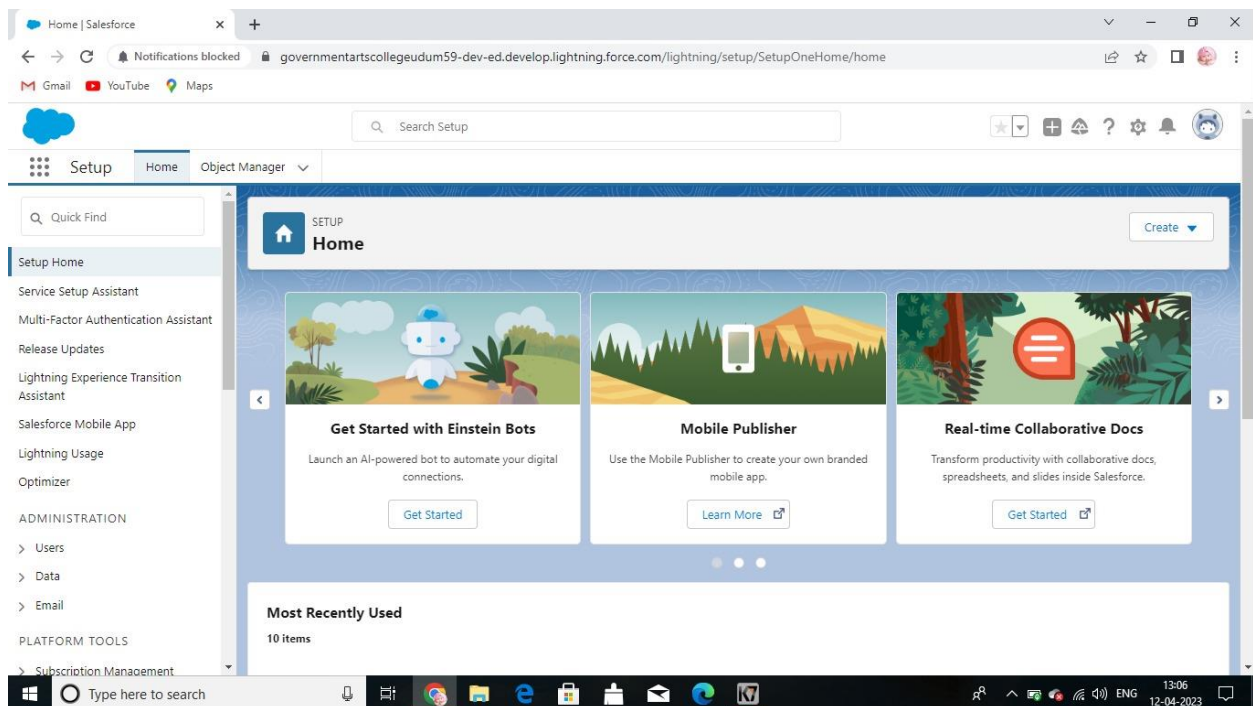
#### Milestone-2:

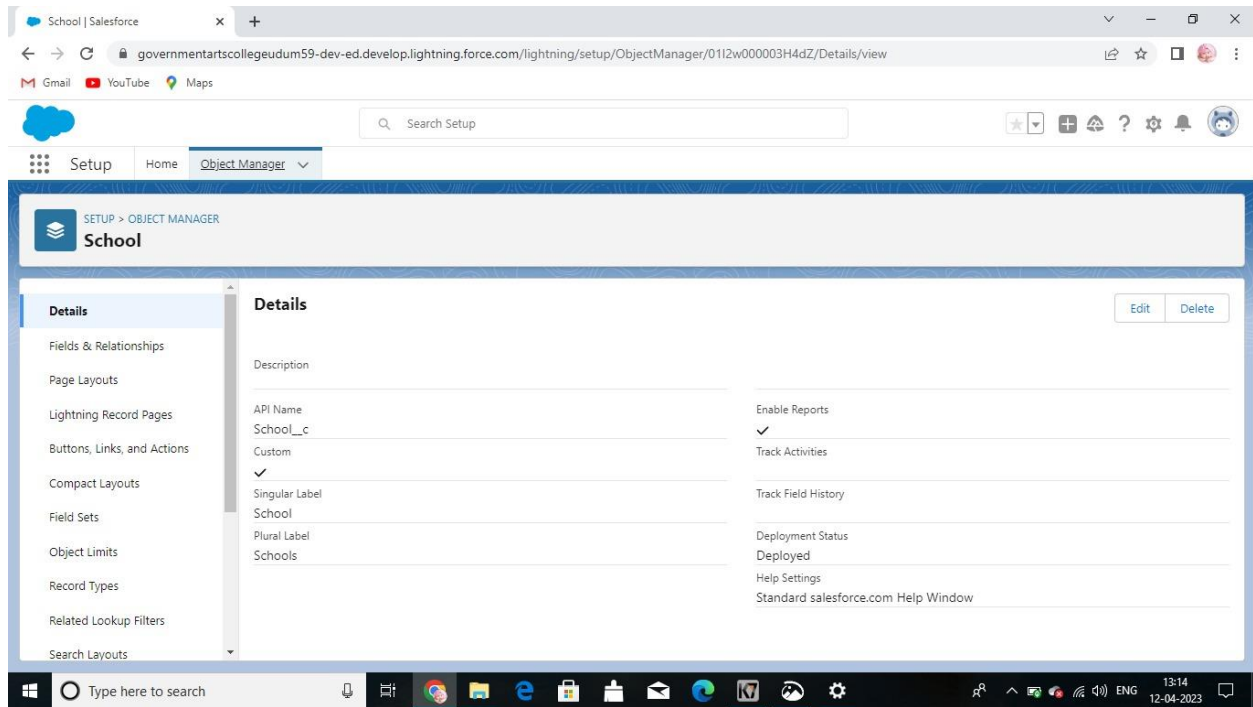
Object Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

#### Activity-1:

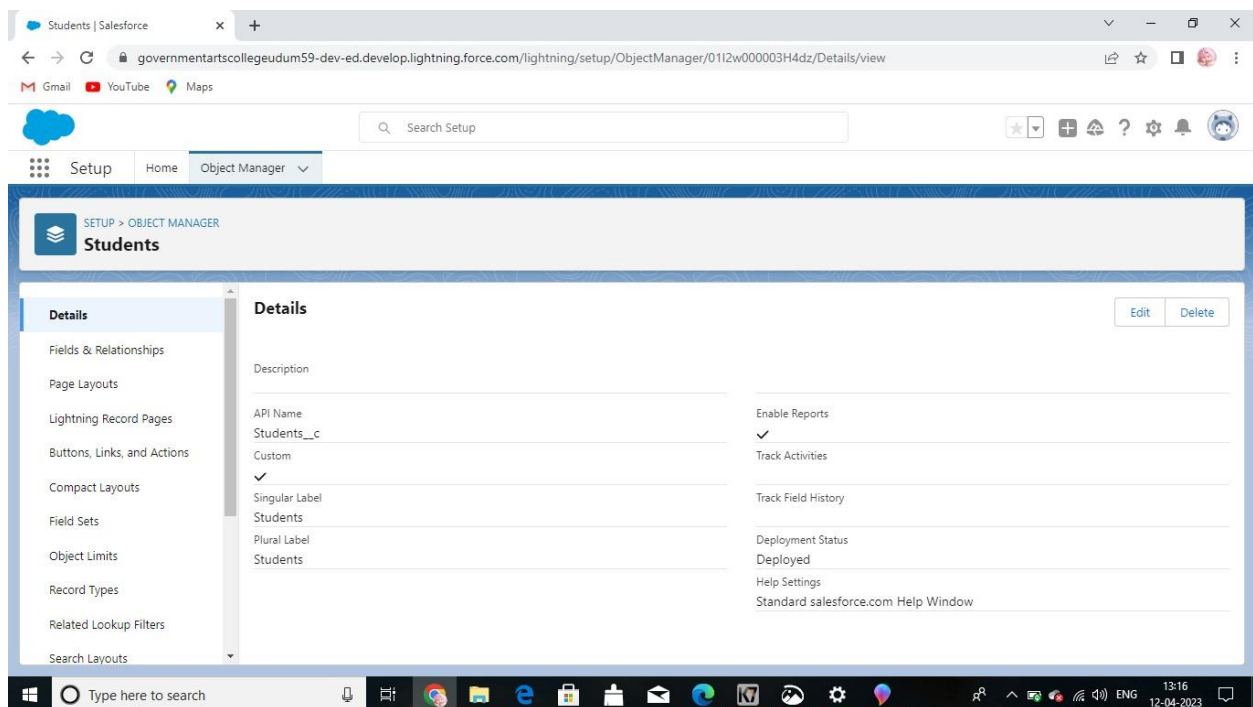
Creation of School Object Creation of Objects for School Management:

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.

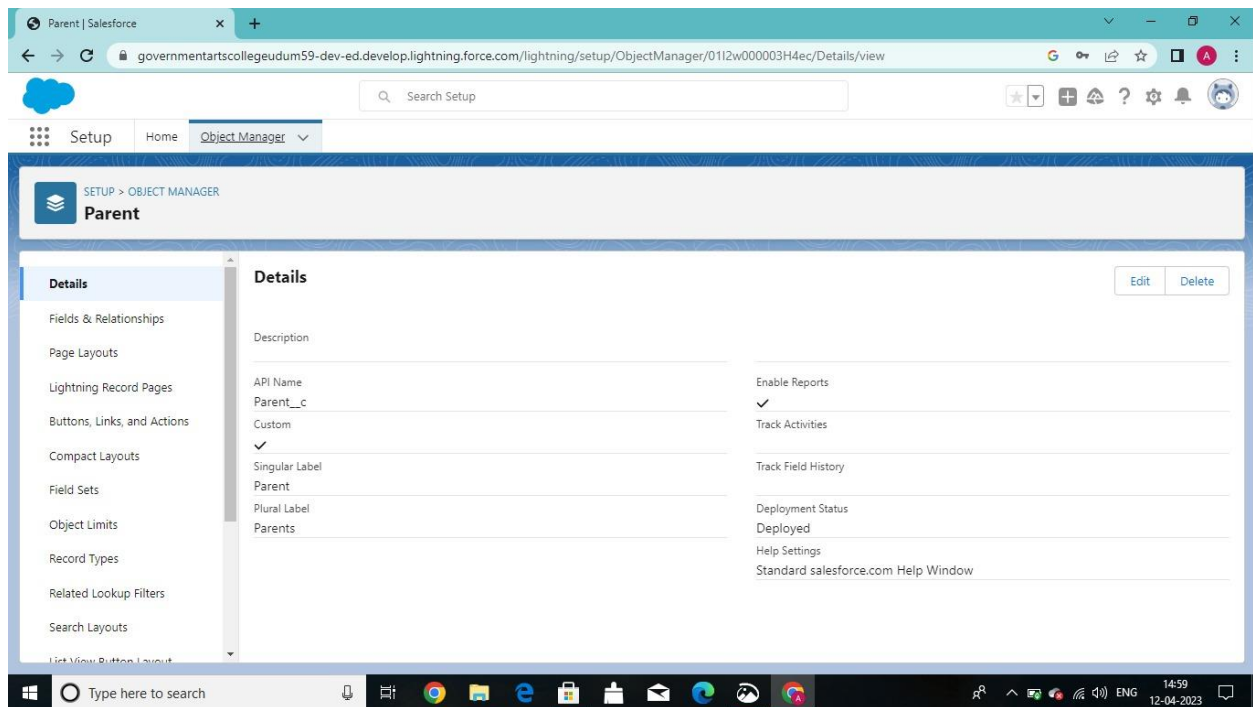




## Activity 2: Create student object:



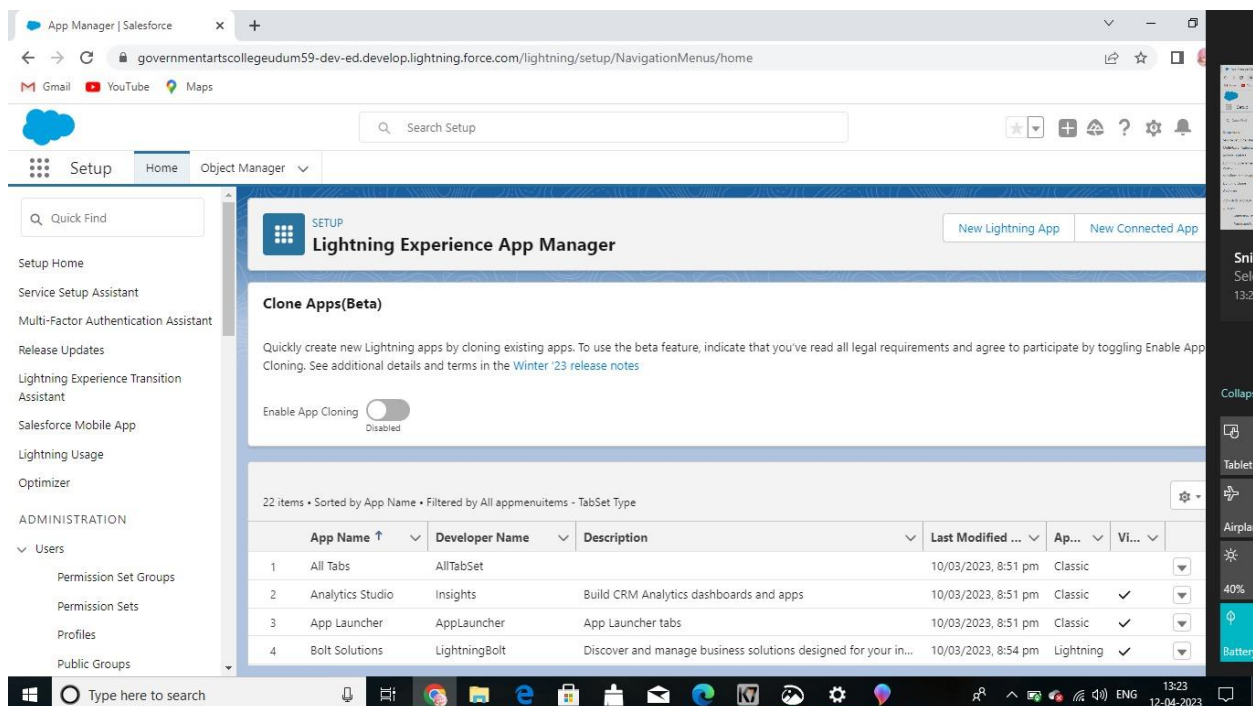
## Activity 3: Create parent object:



### Milestone-3:

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

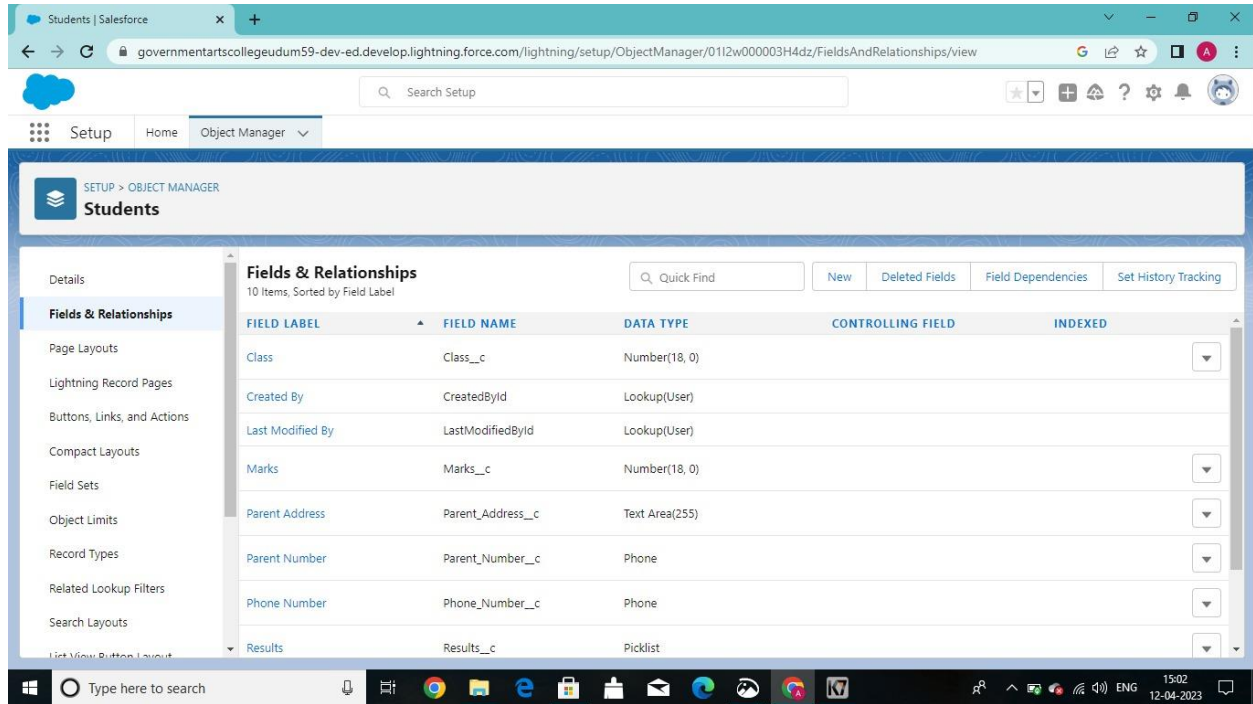
Create the School Management app:



## Milestone -4:

### Fields and Relationship

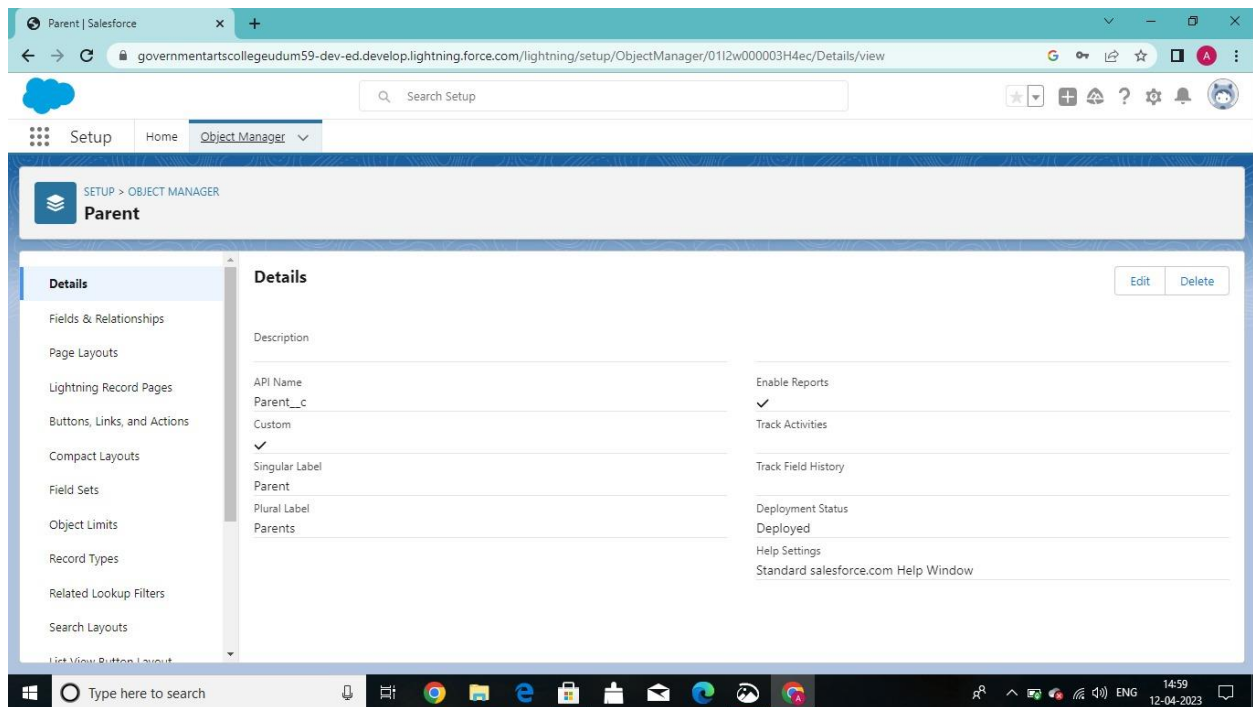
An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.



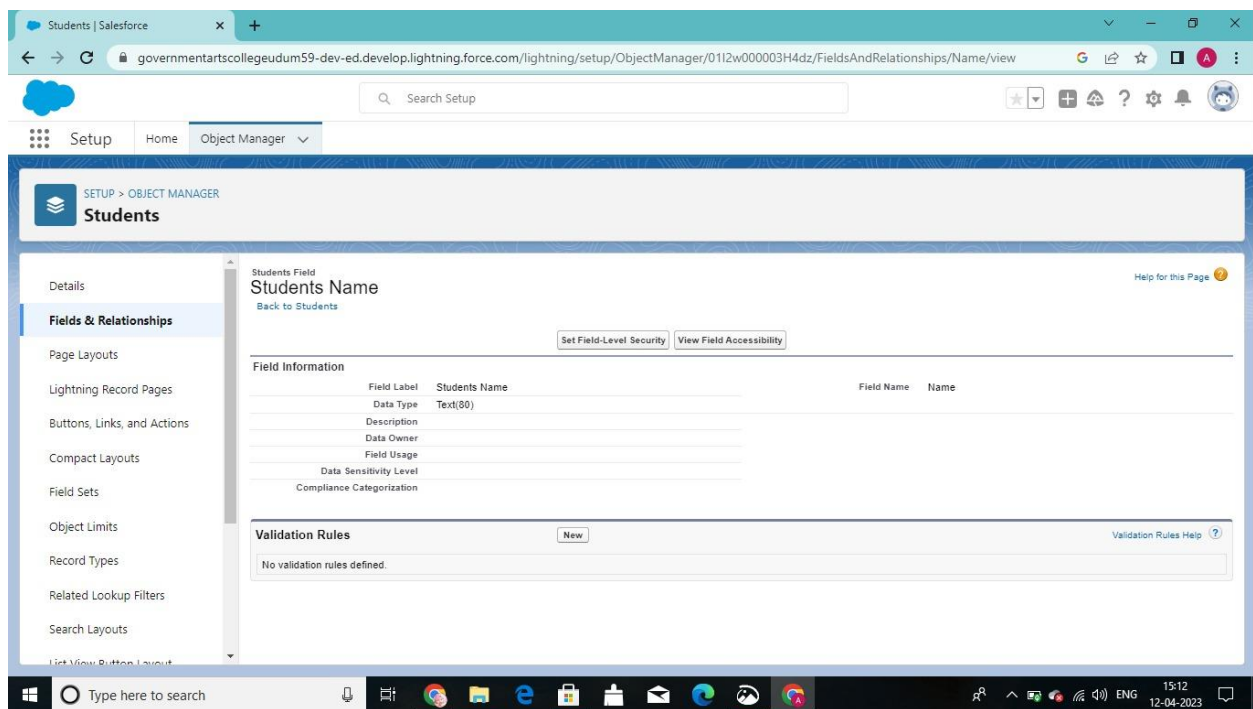
The screenshot shows the Salesforce Setup interface for the 'Students' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields. The fields are sorted by Field Label. The table below summarizes the fields shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Parent Address	Parent_Address__c	Text Area(255)		
Parent Number	Parent_Number__c	Phone		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		

Activity-1: Creation of fields for the School object:

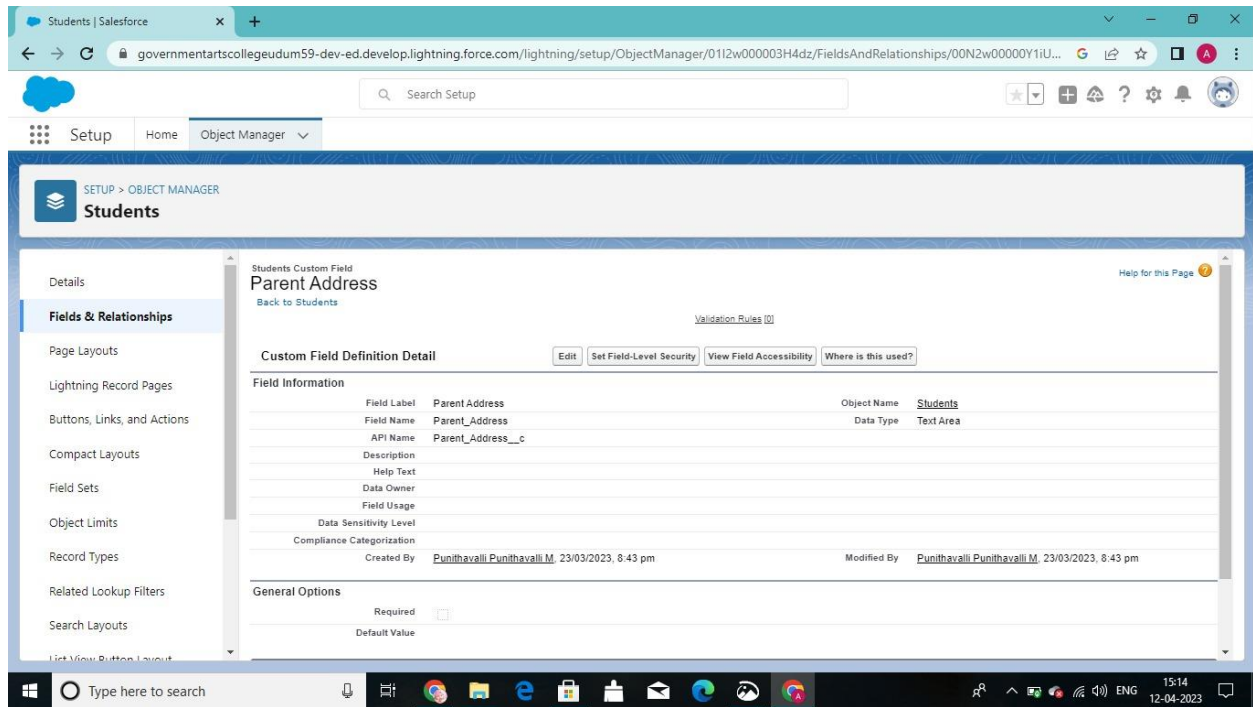


## Activity-2: Creation of fields for the Student objects:



## Activity-3: Creation of fields for the Parent objects:





#### 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 Typies Login hours & Login IP ranges

Activity:

Creation on profile:

Profiles | Salesforce

governmentartscollegeudum59-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000GwHrAAK%3FretURL%3D%252...

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Profile: School profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit Clone Delete View Users

Name	School profile		
User License	Authenticated Website	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Punithavalli Punithavalli M.	23/03/2023, 8:47 pm	Modified By: Punithavalli Punithavalli M. 23/03/2023, 8:51 pm

Page Layouts

Global	Global Layout [View Assignment]	Payment Group	Payment Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Price Book	Price Book Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Price Book Entry	Price Book Entry Layout [View Assignment]

Type here to search

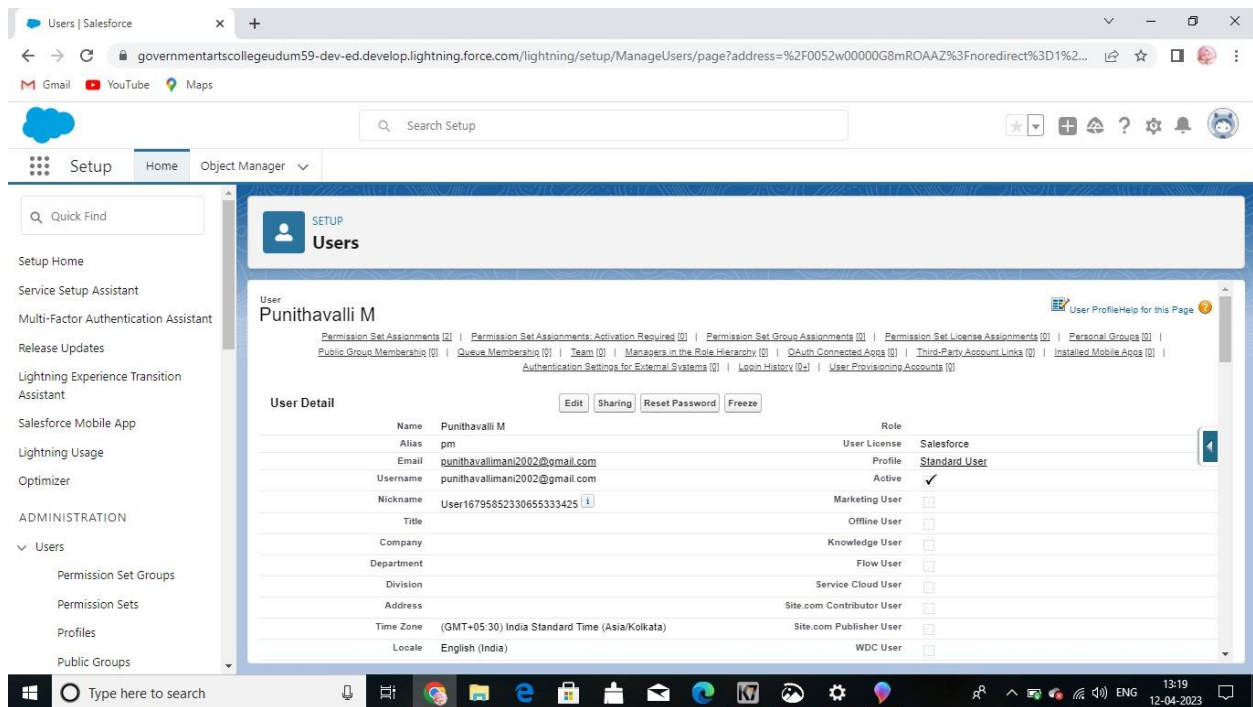
13:21 12-04-2023

## 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:



## 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:

Permission Sets | Salesforce

governmentartscollegeudum59-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P52w0000086cBsGAI%3FretURL%3D%252Fsetup%2...

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

SETUP

### Permission Sets

Permission Set: Teacher permission

Find Settings... Clone Edit Properties Manage Assignments

**Permission Set Overview**

Description	API Name	Teacher_permission
License	Namespace Prefix	
Session Activation Required	Created By	Punithavalli Punithavalli M. 23/03/2023, 9:11 pm
Last Modified By		Punithavalli Punithavalli M. 23/03/2023, 9:11 pm

**Apps**

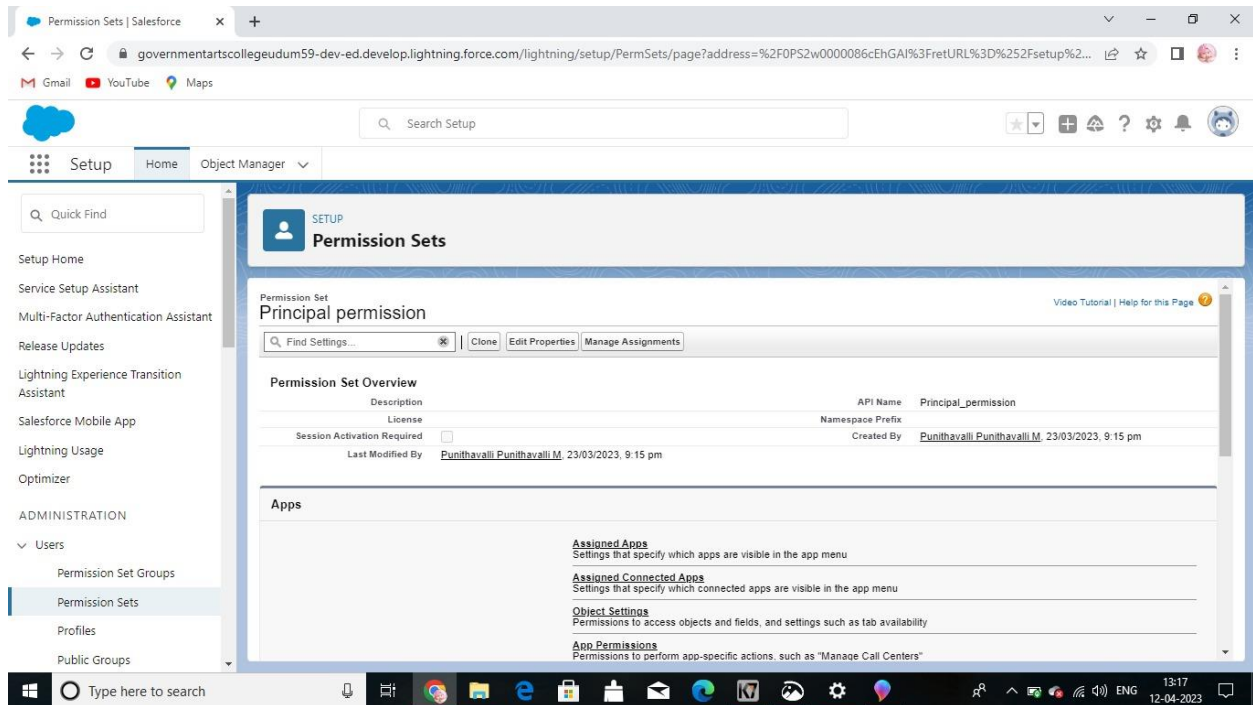
**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

Activity-2: Permission sets 2:



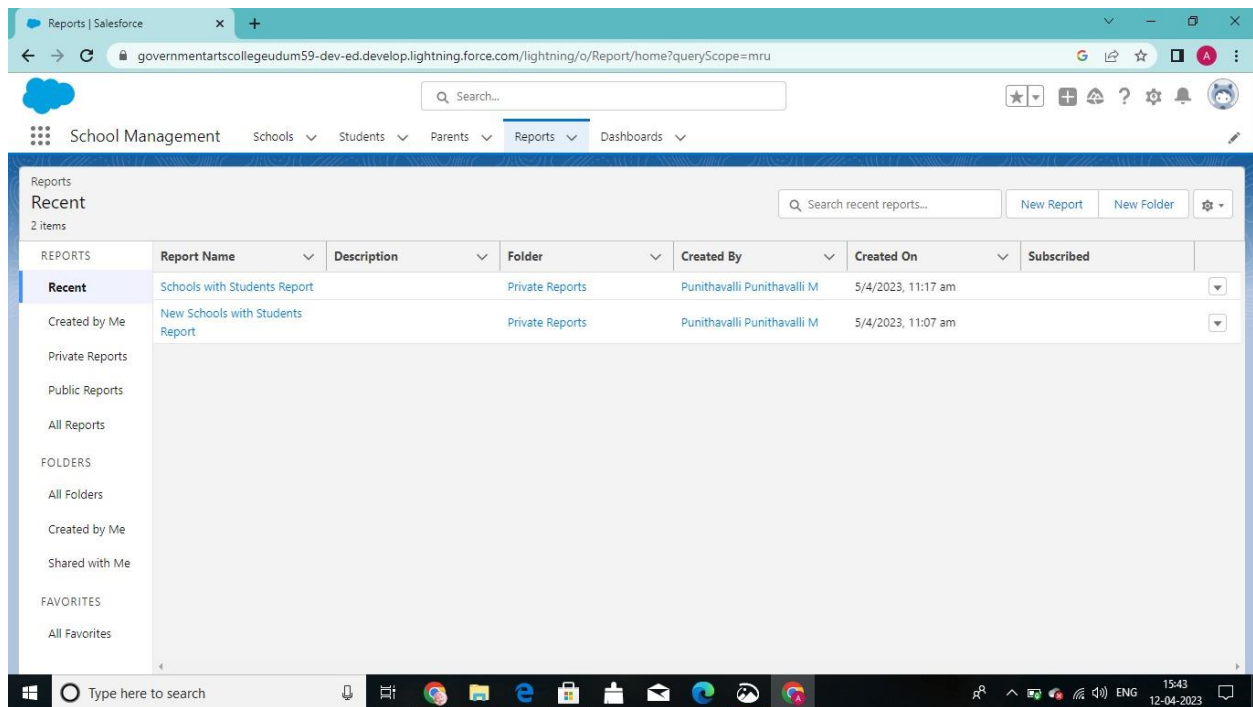
Milestone-8:

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 :



#### 4 Trailhead Profile Public URL

Team Lead -<https://trailblazer.me/id/punithavallim>

Team Member 1 –<http://trailblazer.me/id/sampoornak>

Team Member 2 – <https://trailblazer.me/id/ramana01>

Team Member 3 – <https://trailblazer.me/id/kuyip>

Project Report Template

#### 5 ADVANTAGES & DISADVANTAGE

##### **ADVANTAGES:**

1.Improving The Quality Of Service/Product

With a CRM approach,the company priorities customer relationship, which allows for more feedback.and thanks tothos feedback,you can seriously increase the quantity of your service or your product.

2. Increased customer Loyalty.

All necessary information about the customer is collected and stored in a database that is available to all employees of the sales department. This ,it is much easier to meet the clients needs without getting on the clients precious nerves while communicating with the sellers.

### 3. Improving The Organization management process.

The use of automation tools helps in the control and management of employees.with the help of CRM for University technologies,you can get data on the effectiveness of each of your teachers and students

### 4.Easy Implementation

Gone are the days when to implement CMR you had to call a team of specialists and spend several days on installation.today to implement CRM ,it is enough to download the installation file from the developer's website or use the boxed version of the product.at the same time ,you can work with CRM right away ,and employees can easily master the program while working though an intuitive interface

#### **DISADVANTAGS:**

1. . Users mention that the platform frequently rolls out updates to patch up ongoing problem
2. slate users highlight that the platform isn't intuitive and uses a lot of jargon the level of customer service can also vary depending on whether you're chatting with abot or a human agent.
3. keep in mind that the educational sector is an optional feature of the standard CRM so you may be paying for more tool than you need
4. users report tech glitches and stability issues which sometimes prevent access to the CRM.This is a problem for schools and colleges who need to view and manage their data.

#### 6 APPLICATIONS

1.CrM software provides benefits throughout the entire student journey from the first class through graduation,career planning, and placement.monitor data such as contact information, demographics and academic progress to identify at-risk students and intervene before they drop out

Engaging with former students also builds to the donor base so you can invite those with undergraduate degrees back to graduate school or university -sponsored events maintaining connect with former students may also boosts recruitment by encouraging them to.

#### 2. streamlined admissions process

your CRM platform will improve the admission process, reducing the need for paperwork spreadsheets and extra staff to sort through traditional applications. Individuals complete their application on the platform and upload the required documents, resulting in a positive user experience. At the back of your CRM store all documents in a central location for staff to access and update applicants.

## 7 CONCLUSION

A quality CRM for higher education will enable the university to streamline its communication efforts across the entire student life cycle through easy data segmentation and automation saving on time consuming administrative and operational tasks.

In other words, a CRM acts as a single source of truth, containing both contact details and communication history.

## 8 FUTURE SCOPE

So you're looking to implement a CRM software (Customer Relationship Management) solution for your business. That's great! But first, you need to determine the CRM scope of the solution you'll be implementing. Defining the scope of CRM projects means figuring out which areas of your business need to be included in the CRM implementation plan. Before any CRM initiative begins, scoping is essential to establish what the effort will and will not cover, as well as to prevent feature creep and project bloating. Follow the steps below to properly define the scope for your next CRM project.