

Project Report Template

1 INTRODUCTION

Business people started using the term Customer Relationship Management (CRM) since the early 1990s when the concept of business started to change from being transactional to relational. CRM directly contributes towards customer benefits and the growth of businesses

Information technology plays a very critical role in identifying, acquiring, and retaining the customers, and thereby managing a healthy relationship with them.

1.1 Overview

Customer relationship management(CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers.

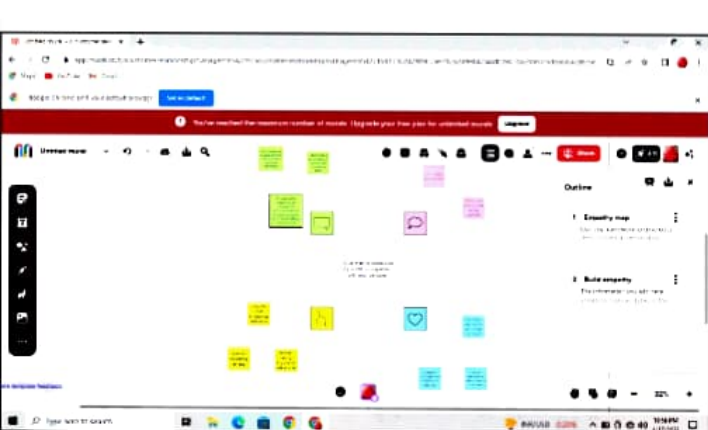
the goal is simple: Improve bussibess relationships. ACRM system helps companies stay connected to customers, streamline processes, and improve profitability.

1.2 Purpose

A CRM is a system that helps schools manage the entire lifecycle of a potential customer-sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access place.

2 Problem Definition & Design Thinking

2.1 Empathy Map

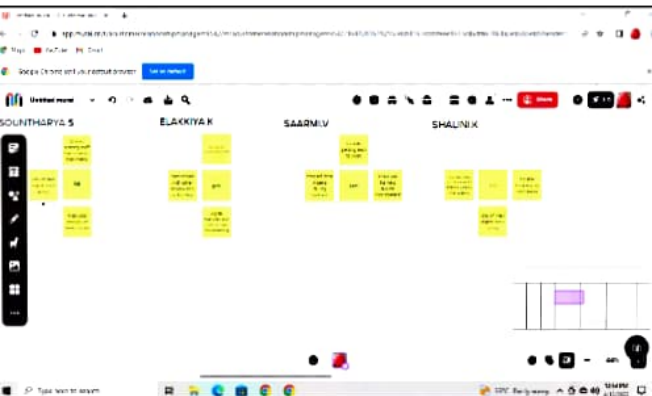


2.2 Ideation & Brainstoming Map





2.2 Ideation & Brainstoming Map



3 Result

3.1 data model

Object	Object name	Fields in the
data type	Object 1	fields label
text	school	
	Object 2	fields label
data type		
text	student	

3.2 Activity & Screenshot

Creation of an application for school management.

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

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 Salesforce Org:

Milestone-1:

Introduction

Are you new to salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to salesforce! salesforce! is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is salesforce, anyway?"

What Is Salesforce?

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.

So what does that really mean? Well, before salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity :Creating Developer Account

Creating Developer Account

Creating a developer org in salesforce

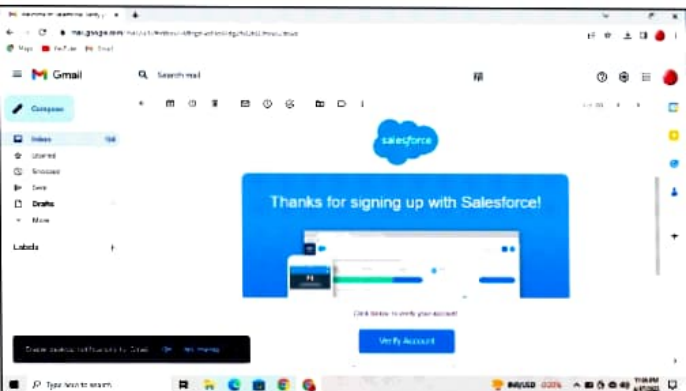
1. Go to developers.salesforce.com/
2. Click on sign up
3. On the sign up form, enter the following details:
 - a. First name & Last name
 - a. Email
 - b. Role : Developer

- 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.

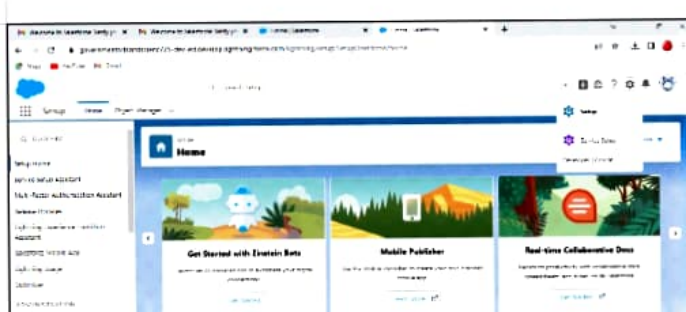
Account Activation

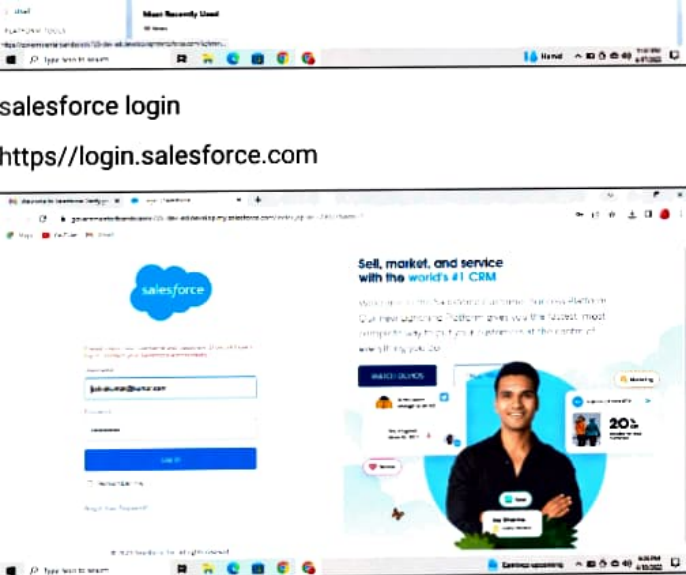
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email take 5-10 mins, as



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.





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.

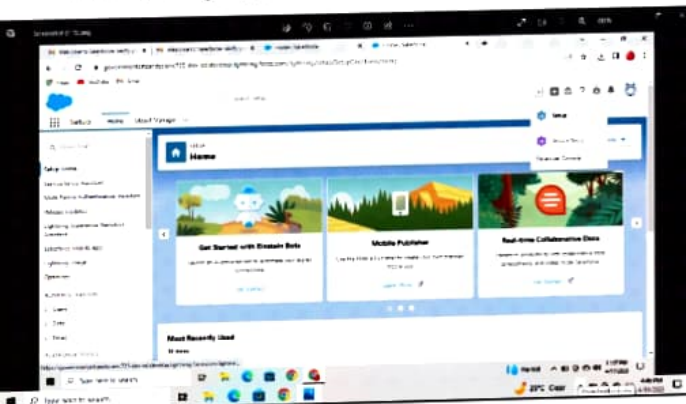
Activity-1: Creation of School Object

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.

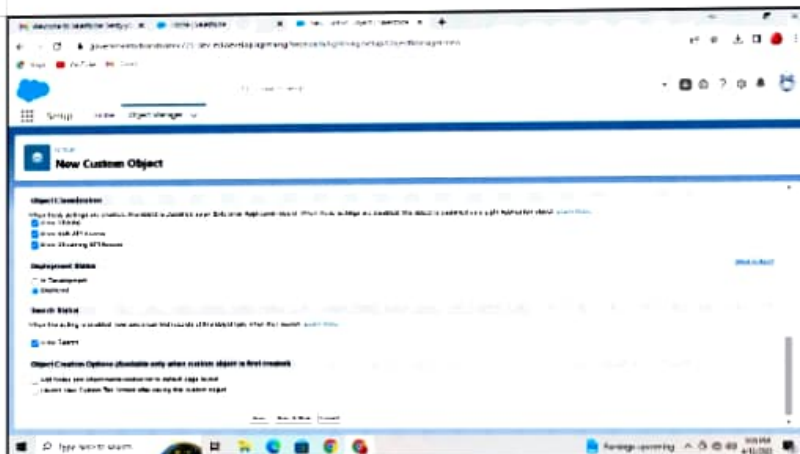
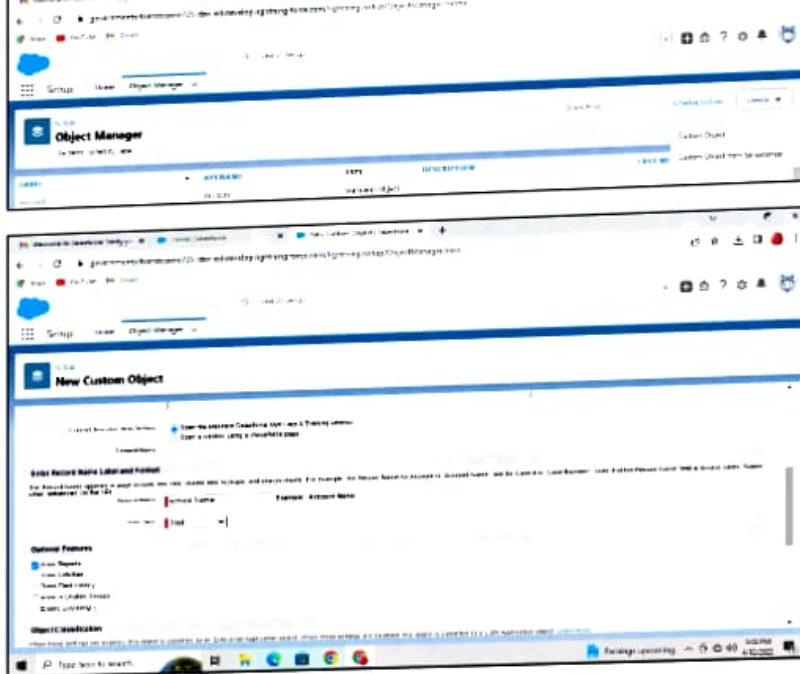
1. Click on the gear icon and then select setup.



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:

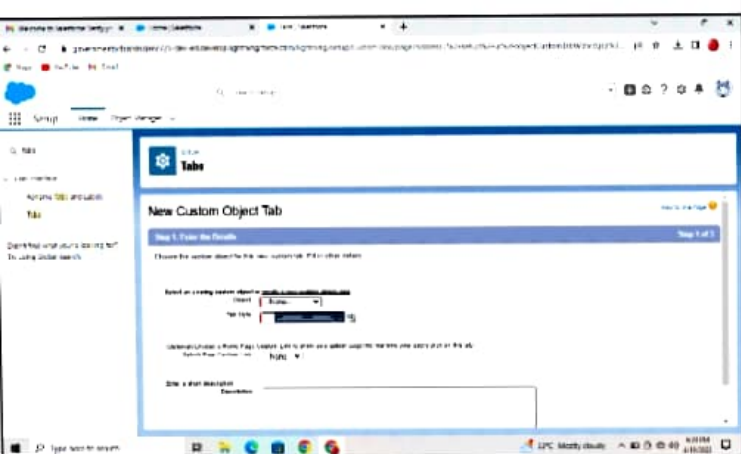
Label: School



Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Objects 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 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:

Lable : Students

Plural Lable: Students

Record Name: Student name

Cheak the Allow Reports Name

Cheak the Allow Reports cheakbox

Cheak the Allow Search cheakbox

Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find 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 objects as follows:

Lable: Parent

Plural Lable: Parents

Record name: Parent name

Cheak 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 Tabs, click new.

1. For Objects, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

Milestone-3: Lightning App

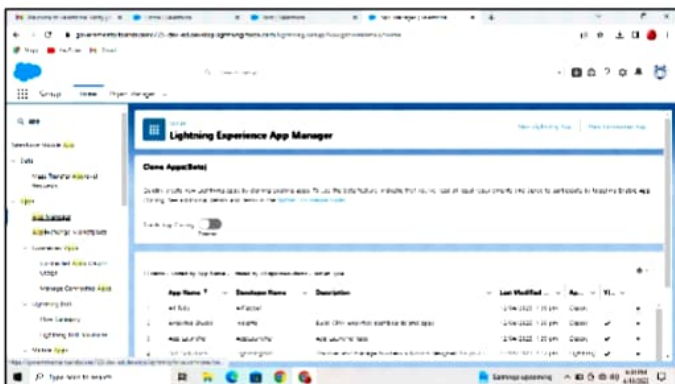
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a

particular set of tabs. The simplest set app usually has just two tabs

Activity:

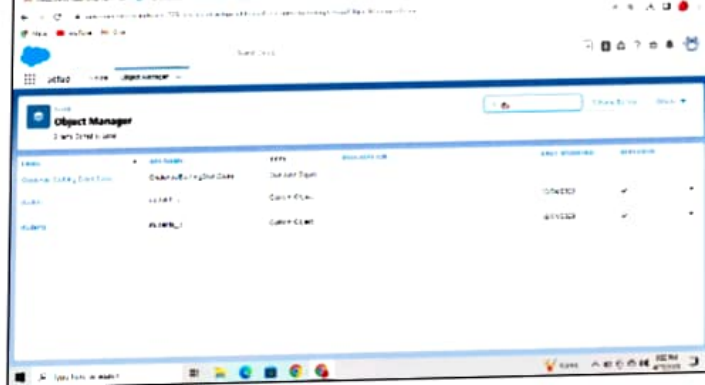
Create the school management app

from setup, enter app manager in the quick find select app manager.



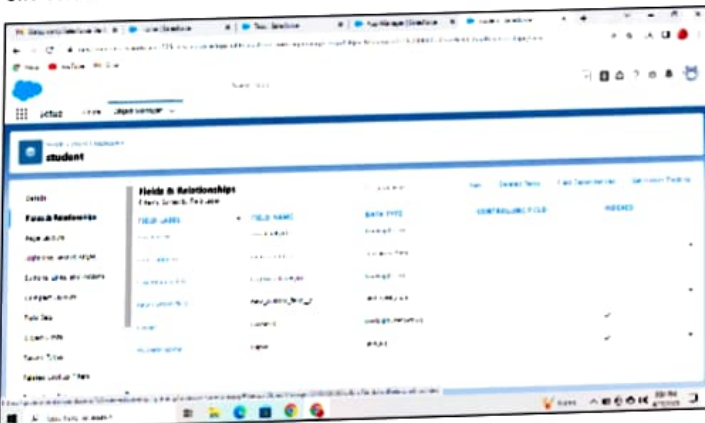
click new lightning app. enter school management as the app name, then click next





3. Select school.

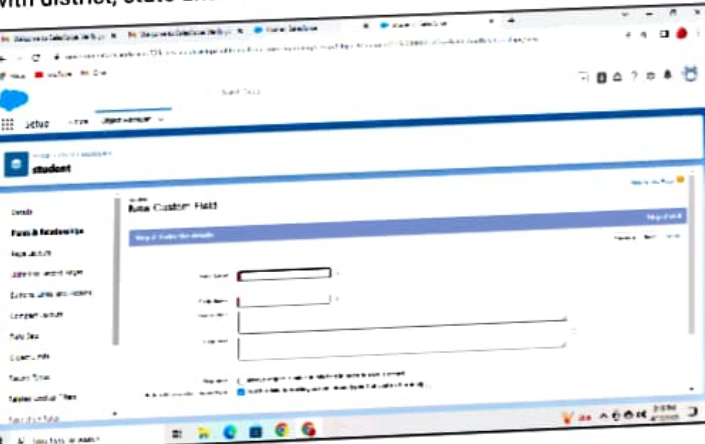
4. Select fields & relationships from the left navigation, and click new



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.

select the phone as data type.

lets see this

1. Select the phone as the data type, click next.
2. for field label, enter phone number.
3. click next, next, then save & new.

lets create roll-up summany 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 summy 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 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, the new.
3. select picklist as the data type and click next.
4. for field label enter results.

6. select picklist as the data type and click next.

4. for field label enter results.

5. select enter values, with each value separated by 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 permission, filed permission, user permission,tab settings, app setting, apex class access, visualforce page access, page layouts, record types, login hours & login ip ranges.

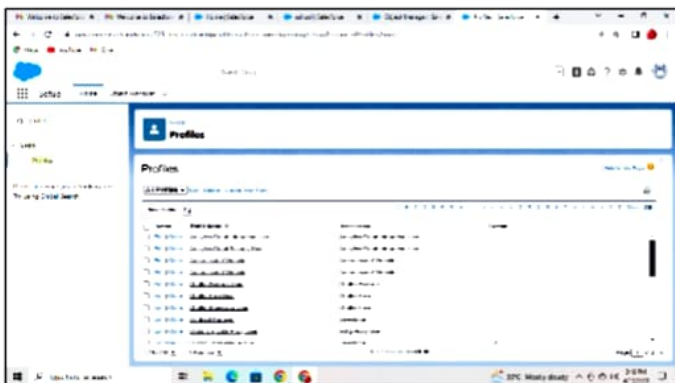
Activity

creation on profile:

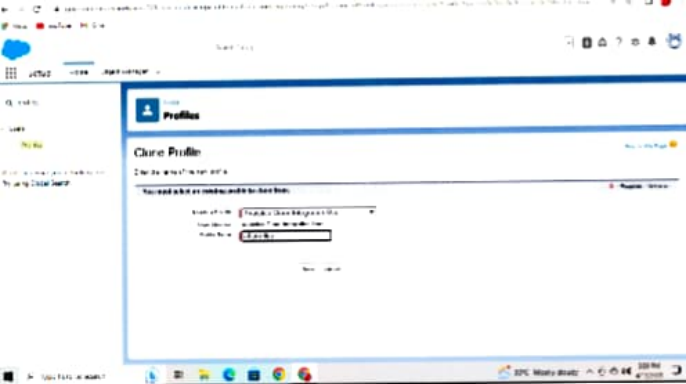
from setup enter profiles in the quick find box, and select profiles.

1. from the list 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 permission and give view all access permissions and assign to the parent profile

Milestone-6: users

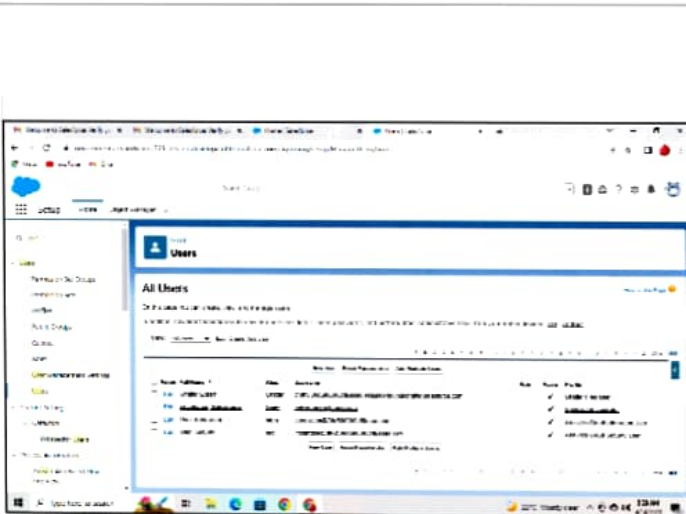
A user is any one who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity:

creating a users:

1. from setup, in the quick find box, enter users, and then select users.

2. click new user

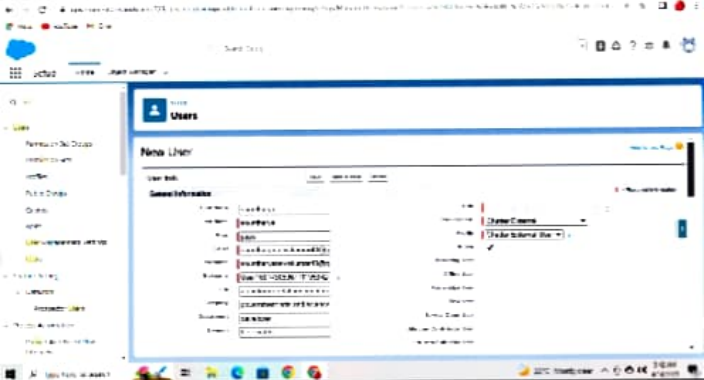


3. enter the user's name parents and (your) email address and a unique username in the form of an email address. by default, the username is the same as the email address.

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.

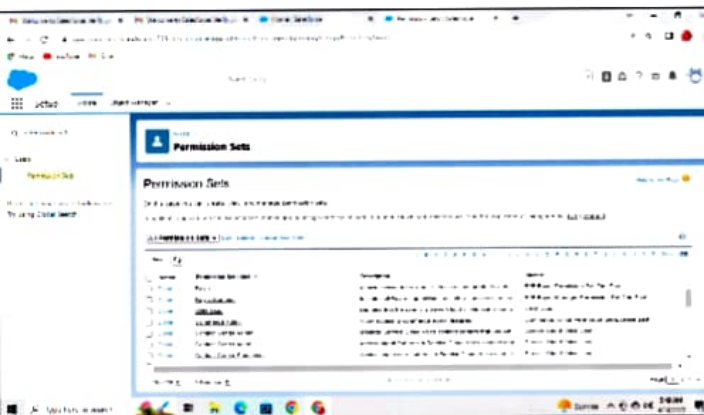
Milestone-7: Permission sets

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:

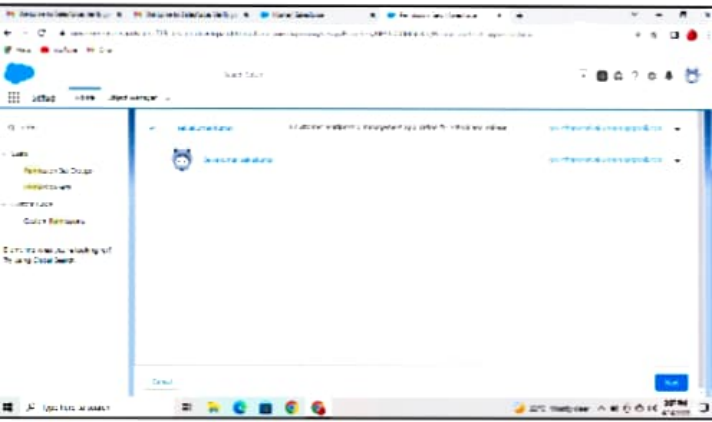
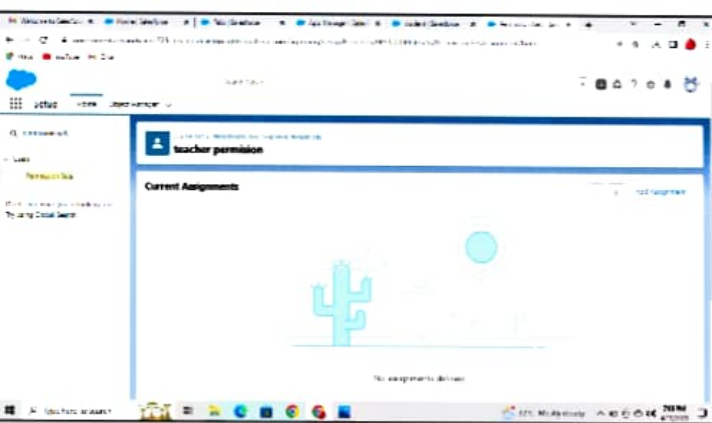
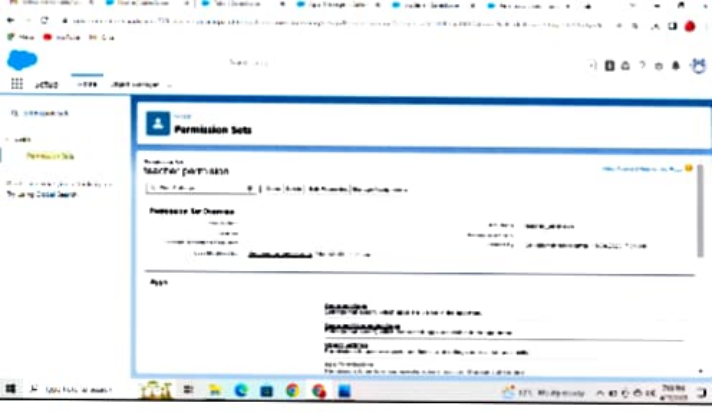
Permission sets 1:

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 setting give the view create and edit permissions to all custom objects and assign to the teacher use





similarly follow the above steps for the permission set 2.

Activity-2:

Permission set 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 setting give all permissions for all permissions for the

Similarly follow the above steps for the permission set 2.

Activity-2:

Permission set 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 setting give all permissions for all permissions for the custom objects and assign them to the principal user.

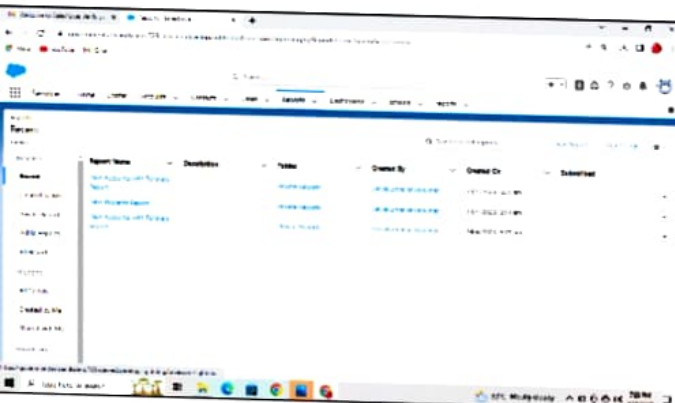
Milestone-8: Reports

A report is a list of records that meet the criteria you define. it's displayed 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

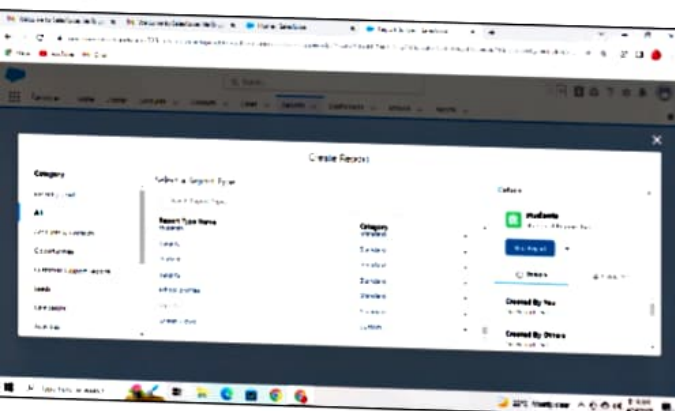
Activity:

Reports:

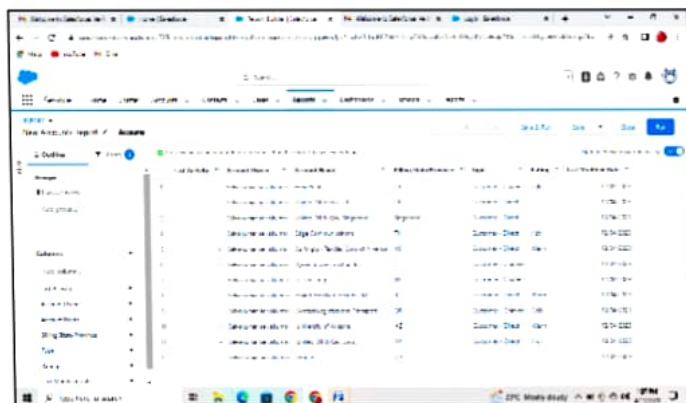
1. from the reports tab,click new report



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.



4 Trailhead profile public url

team lead-
<https://trailblazer.me/id/sountharyaselvakumar>

team member 1- <https://trilblazer.me/id/eelakkiya2>

team member2- <https://traiblazer.me/id/skumar9421>

team member3- <https://trailblazer.me/id/vsaarmi>

5 ADVANTAGES & DISADVANTAGE

It facilitates things by giving you and the customer, ease of communication, organized data, and improved customer service. all of this will streamline the process of making sure needs are met and actions get resolved in a timely manner.

CRM costs. one of the greatest challenges to CRM implementation is cost. business culture. a lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.

6 APPLICATIONS

Choose the CRM type, roles, and platforms. types of CRM systems. learn what user roles your CRM system needs. select which platforms to support

deciding on CRM features. crucial features. main features..

calculating the CRM development

looking the CRM development budget

7 CONCLUSION

CRM is technology for managing all your company's relationships and interactions with customers and potential customers. the goal is simple: Improve business relationships. a CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

8 FUTURE SCOPE

CRM systems and workflow optimization

Choose the crm type, roles, and platforms. types of crm systems. learn what user roles your crm system needs. select which platforms to support

deciding on crm features. crucial features. main features..

calculating the crm development

looking the crm development budget

7 CONCLUSION

crm is technology for managing all your company's relationships and interactions with customers and potential customers.the goal is simple: Improve business relationships.a crm system helps companies stay connected to customers, streamline processes, and improve profitability.

8 FUTURE SCOPE

crm systems and workflow optimization

with the help of a crm system, companies solve sales problems, increase the productivity of employees, and regularly monitor important financial indicators. according to EPCGroup's analytics, crms exploed in 20022, achieving an 11.6% CAGR from 2022 to 2027