

# **A CRM APPLICATION FOR SCHOOLS AND COLLEGES**

## **Project Report Template**

### **1. INTRODUCTION**

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

#### **1.1 OVERVIEW**

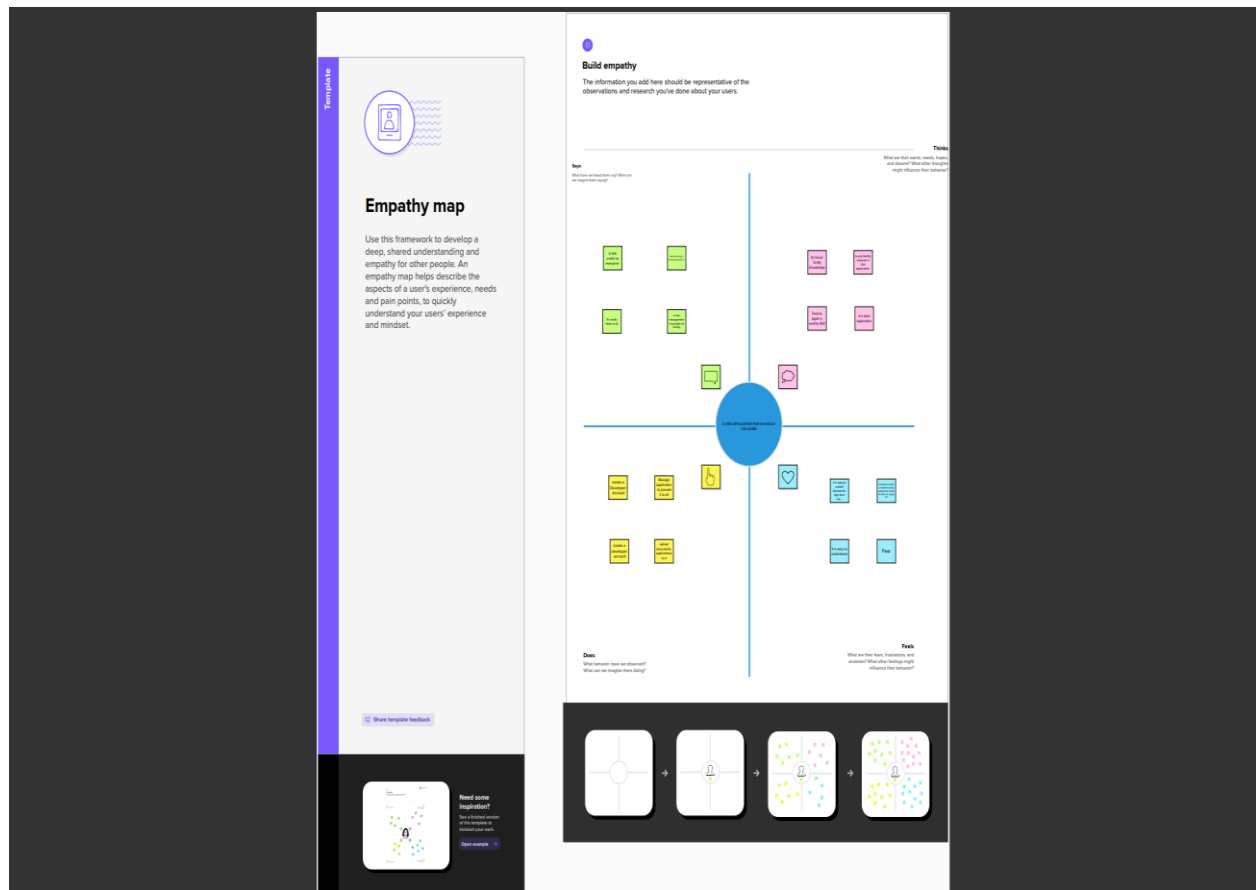
- The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.
- Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal if to improve customer service relationships and assist in customer retention and drive sales growth.

#### **1.2 PURPOSE**

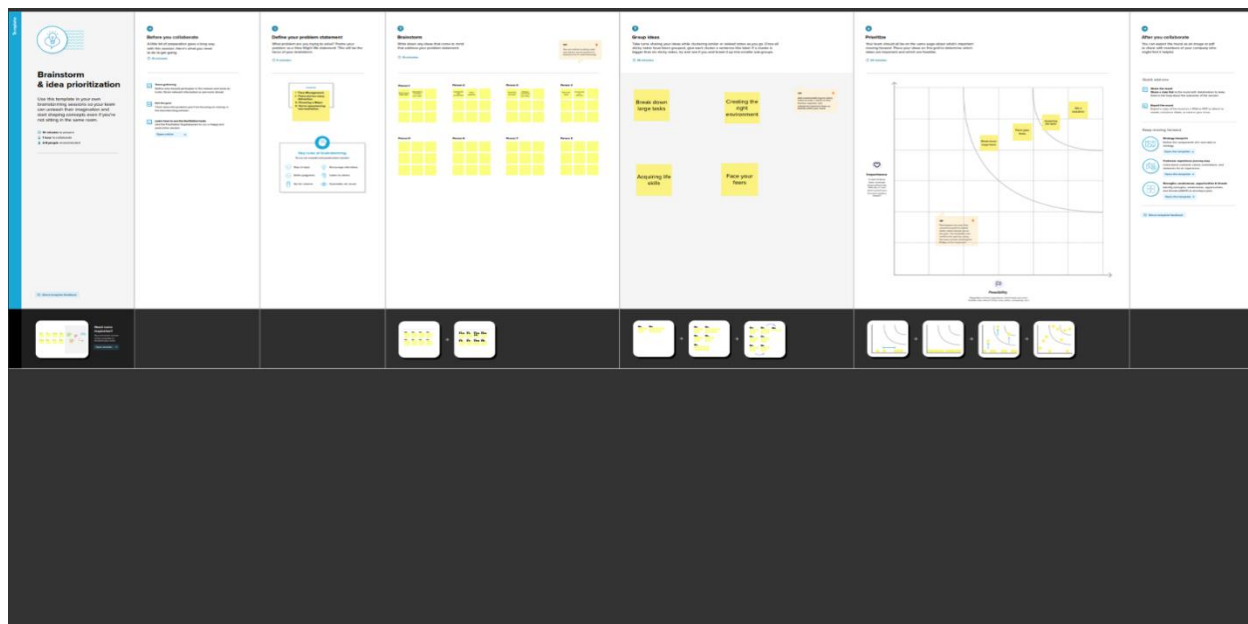
- Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.
- The fundamental purpose of a CRM system is to improve the customer experience. Executing on this objective is the most sure-fire way to see positive results across your business. When you make improved customer satisfaction the main goal for your CRM, all other objectives work to support this goal.
- A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention.

## 2. PROBLEMS DEFINITION AND DESIGN THINKING

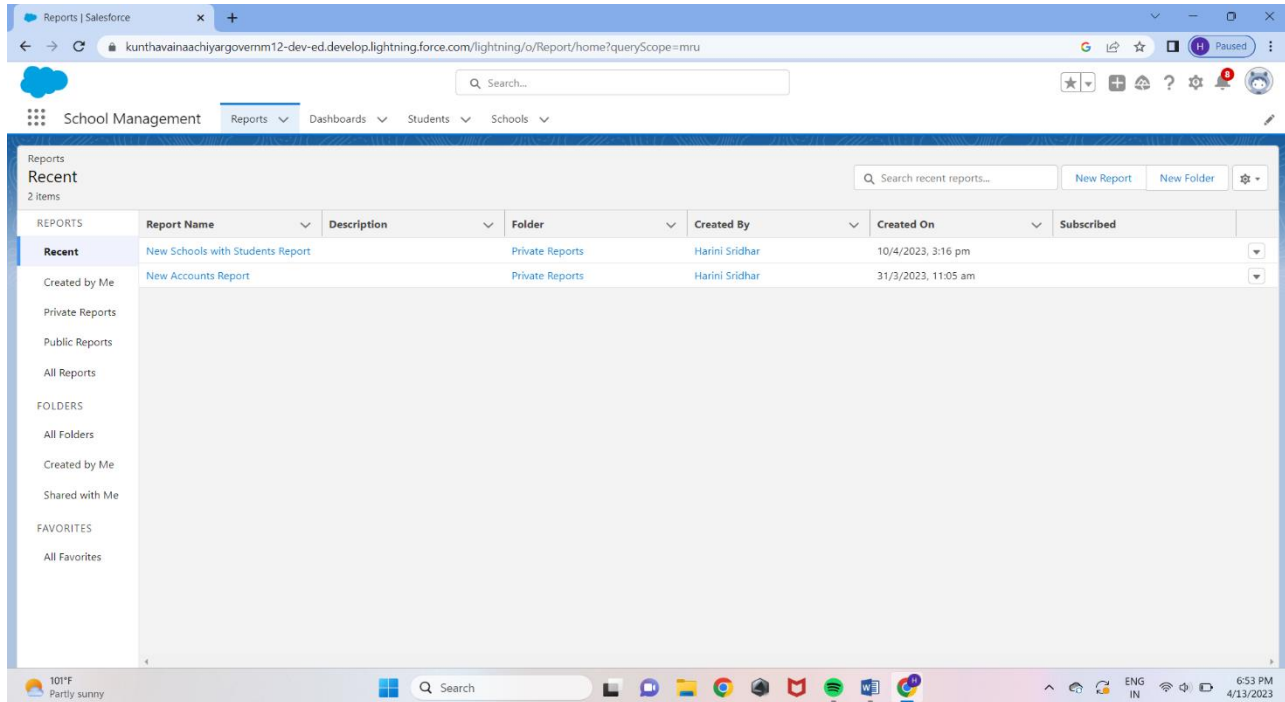
### 2.1. EMPATHY MAPS



### 2.2 IDEATION AND BRAINSTORMING MAPS



### 3. RESULT



### 4. ADVANTAGES AND DISADVANTAGES

#### ADVANTAGES

- Manage student's inquiry and courses enquired.
- Manage student's enrolment information.
- Centralize student's information: this keeps all the data of students, staff, and admission records at one software.
- Maximize student's admission efficiency.
- Run emails, SMS marketing, and information campaigns to attract the students.
- Real time reporting and analytical reports
- Schedule of classes and information on the educational process, by student and teachers with the ability to upload homework and receive feedback
- Ability to create tasks, business processes and schedule work.
- Planning and multitasking.
- Easy implementation.

- History of work with each student.
- Improving the organization management process.

## **DISADVANTAGES**

- Manage the leads as well as the customer's relation: this not only manages the relation of clients even the lead ends. It lets you manage your lead, student collaboration, and recruitments on the unified dashboard.
- Better interaction: It gives you a central view of every interaction, engagement with your students, staff, and trustees.
- Improve the efficiency of services
- Increase the satisfaction of staff.
- Time-saving: As all the activities are done with the support of CRM. Hence, it is a time-saving way to run a business. CRM solves the problems of staff/students, manage the leads, and build the relation with customers.

## **5. APPLICATIONS**

- Student information management: including demographic information, enrollment history, academic records, and contact details.
- Enrollment tracking: Manage the enrollment process from lead generation, application, acceptance, and enrollment.
- Academic progress tracking: Monitor student progress, including grades, attendance, and behavioral records.
- Communication tools: Stay in touch with students, parents, staff, and alumni using email, SMS, and other communication channels.
- Event management: Plan open days, reunions, and fundraising events.
- Fundraising management: Manage donations and other fundraising activities.
- Reporting tools: Use a dashboard to gain valuable insights into operations and make data-driven decisions that support student retention.

- Integrations with other educational systems: Connect with other software systems such as Learning Management Systems (LMS), Student Information Systems (SIS), and Finance and Accounting Systems.
- Using CRM in education industry provides organizations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student's engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.
- A CRM system can help educational organizations effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalizing communication and providing automated follow-up, educational organization can build better relationships with students and leads, and keep them engaged over time.

## **6. CONCLUSION**

- The customer relationship management has simplified the handling of customer's in many industries.
- A CRM is a customer-centric system that can help education professionals nurture relationships with prospects and enrolls, produce data-driven insights to illustrate progress towards goals, and streamline their admissions initiatives to save time and effort.
- Therefore, after few years CRM will be the important and better process for customer management.

## **7. FUTURE SCOPE**

- With the increase in complexities, educational institutes have also changed their approach to operate. These organizations embraced CRM for educational institutions to enhance student experiences, streamline operations, track and maintain information to develop a deeper understanding of their processes, and extend their outreach.
- A CRM for education industry to improve the way organizations function:

- The admission process can be tricky. It needs wide-reaching strategies to pull in the interest of the target demographics of students. On top of this, dealing with a constant influx of applications from different regions and using various technology channels is too overwhelming to manage manually. You need the correct software application to handle this effectively.
- CRM for educational institutions tracks and automates the tasks involved in the admission process, such as gathering and storing applicants' data, sending messages to inform about their enrollment status, etc. The system also lets you manage the course and program each student is admitted to along with their batch and roll number, academic documents, and other related details on one single platform.
- Track Student Life-Cycles Within the Institution
  - The student lifecycle begins with the admission and goes all the way to graduation.
  - CRM software enables you to establish and uphold personal well-being with the students and helps them achieve academic success. It has built-in alerts that enable you to notify students about upcoming exam schedules, fee payment deadlines, and other information updates. Leveraging data stored in the system, you can also develop personalized messages to enrich the student interactions. In addition, the centralized platform improves information sharing outreach across all departments.
- Build Relationships with Prospects Using CRM for Schools and colleges.
  - I. The process of building connections with prospective students may feel more like an art than a precise science, but with CRM, it's possible to shift that balance.
- Measure Your School's Progress with CRM Reporting
  - I. One of the great strengths of the CRM model is in how it collects and organizes large quantities of useful data in a manner that is easily accessible. As a result, the CRM reports you can generate will make a valuable addition to your school's recruitment measurement.
    - 1. **Speed to Lead**– A measure of how soon your staff members are following up with new leads once they enter the system.

2. **Meetings Outcome**– A summary of any meetings your staff have held with leads.
3. **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.
4. **Leads by Stage**– All leads segmented by admissions stage showing the percentage and number of each.
5. **Leads by Program**– All leads segmented by program of interest (if known) showing the percentage and number of each.
6. **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.
7. **Lead Status**– Leads segmented by status (Hot, Warm, Cold, Not Interested, Not Applicable).
8. **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.
9. **Calls Outcome**-All calls made by specific outcome (Connected, Busy, No Answer, etc.).
10. **Admissions Activities Summary**– A summary of all follow-up actions taken by your admissions staff (calls held, meetings, emails sent, etc.).

## 8. Appendix

### A. Source code

## CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

This 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/r9EX3lGde5k>

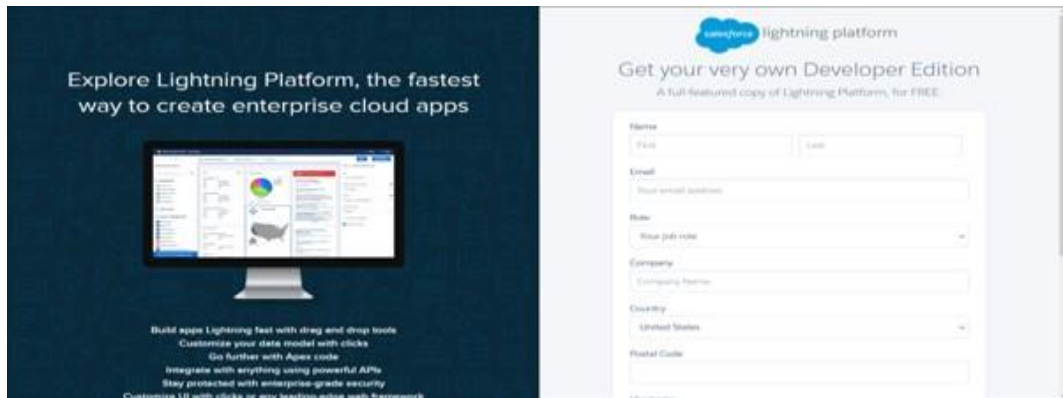
## **ACTIVITY: CREATING DEVELOPER ACCOUNT**

### Creating Developer Account

Creating a developer org in salesforce.

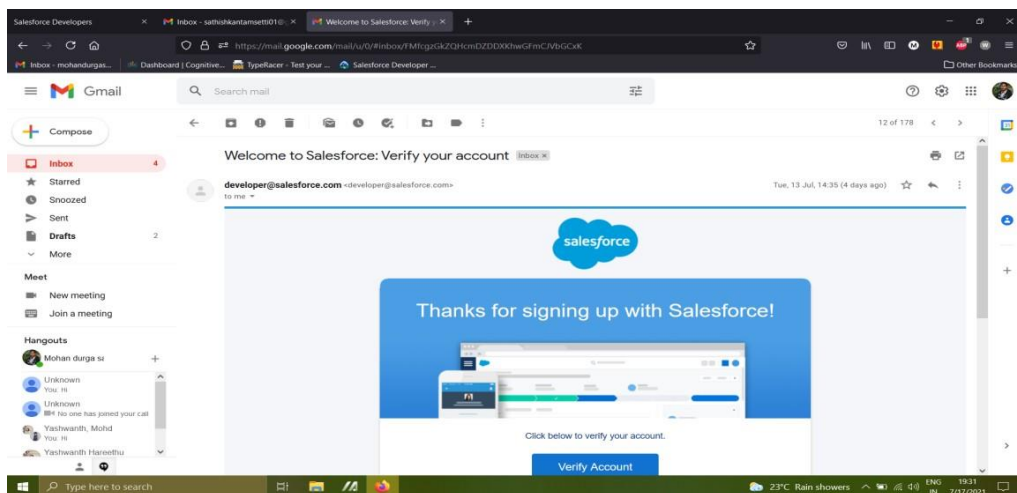
1. Go to [developers.salesforce.com/](https://developers.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details:
  - a. First name & Last name
  - a. Email
  - b. Role: Developer
  - c. Company: College Name
  - d. Country: India
  - e. Postal Code : pin code
  - f. 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

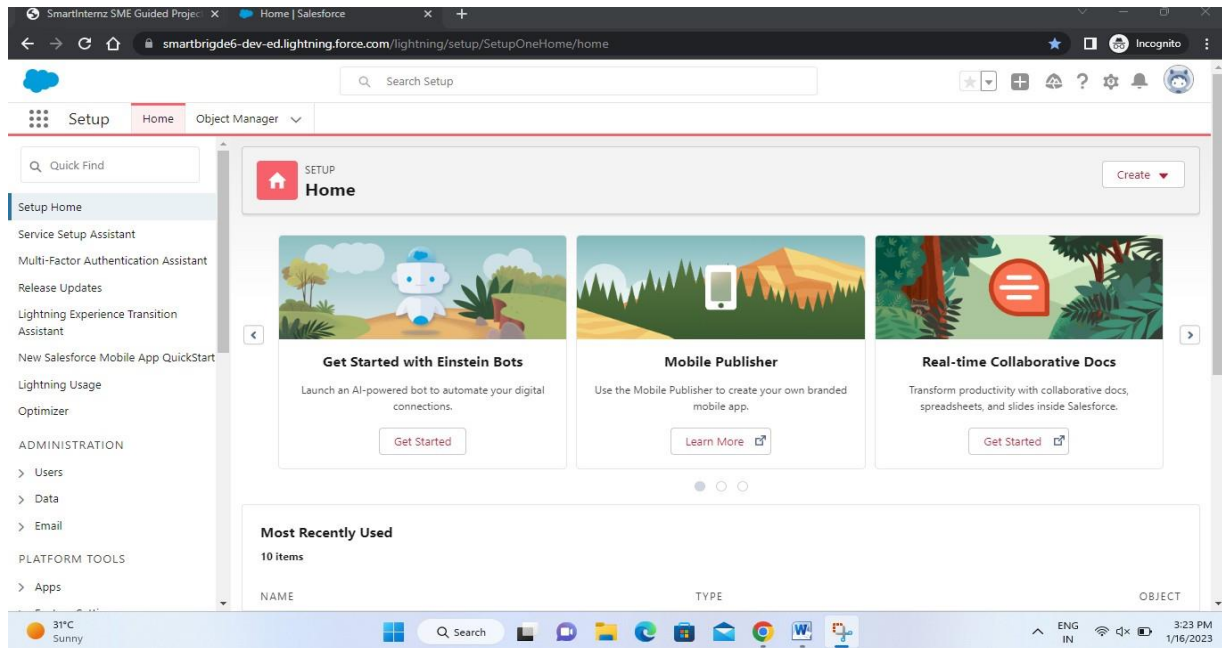
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



## LOGIN TO YOUR SALESFORCE ACCOUNT

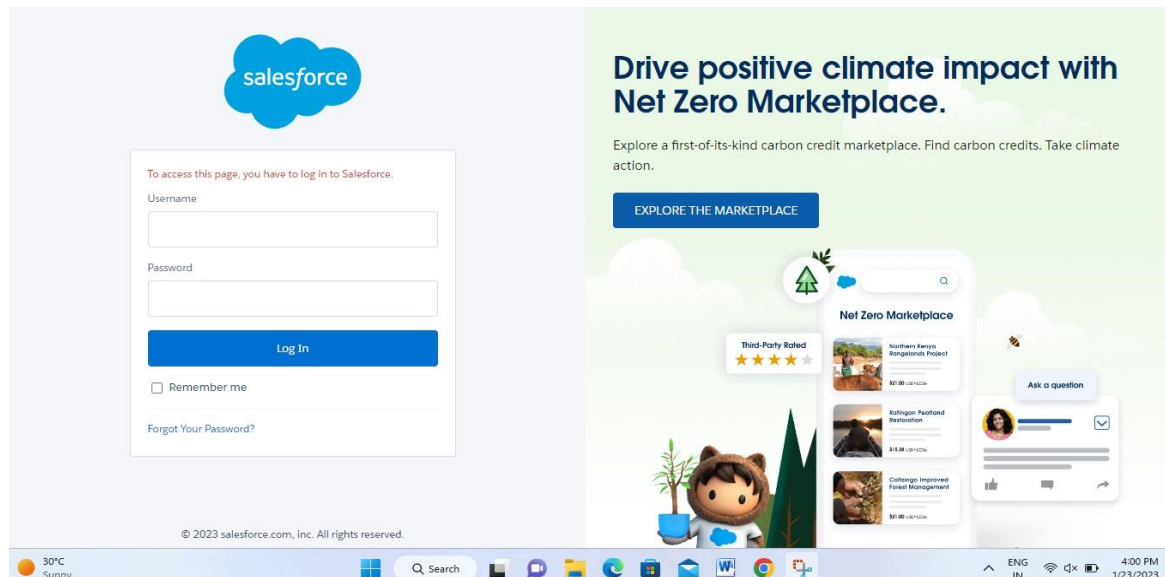
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.

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



## Salesforce Login

<https://login.salesforce.com>

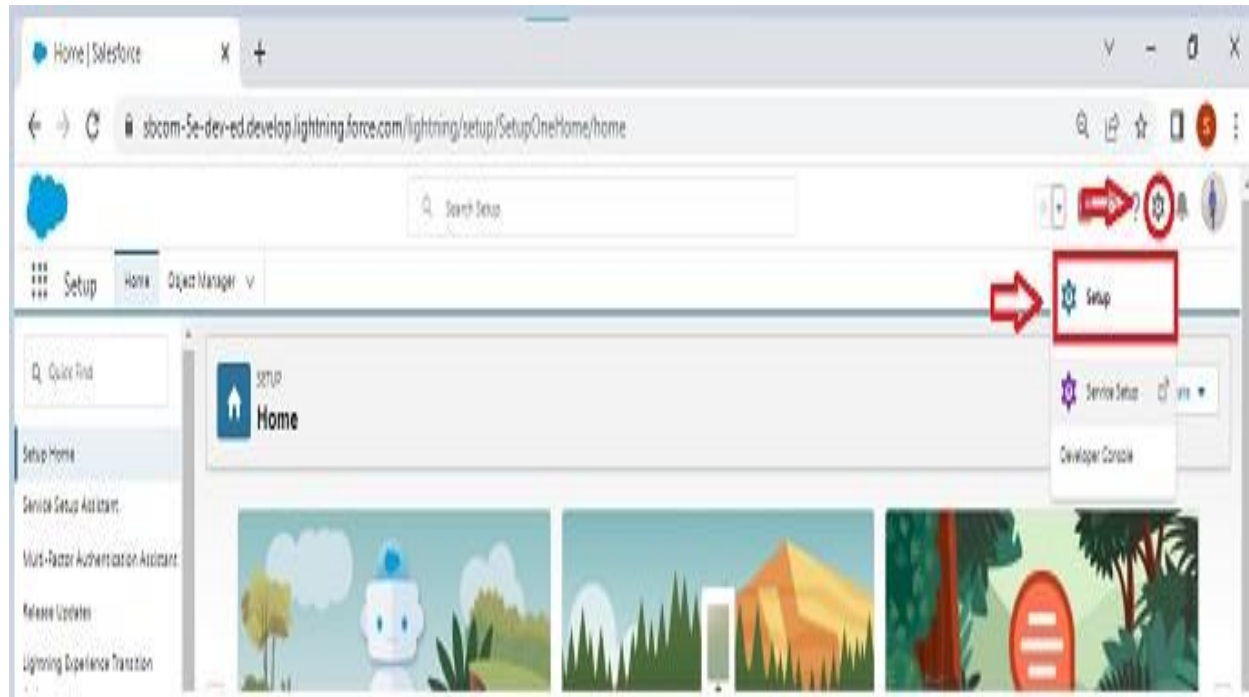


## MILESTONE-2:OBJECT

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. Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.
2. 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.



**Optional Features**

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

**Deployment Status**

[What is this?](#)

- ☐ In Development
- ☒ Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- ☒ Allow Search

**Object Creation Options (Available only when custom object is first created)**

- ☐ Add Notes and Attachments related list to default page layout
- ☐ Launch New Custom Tab Wizard after saving this custom object

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in lists, page layouts, and reports.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with lower letter: ☐

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

Description:

Context-sensitive help setting: ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Context name:

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key links, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name

Data Type:

**Optional Features**

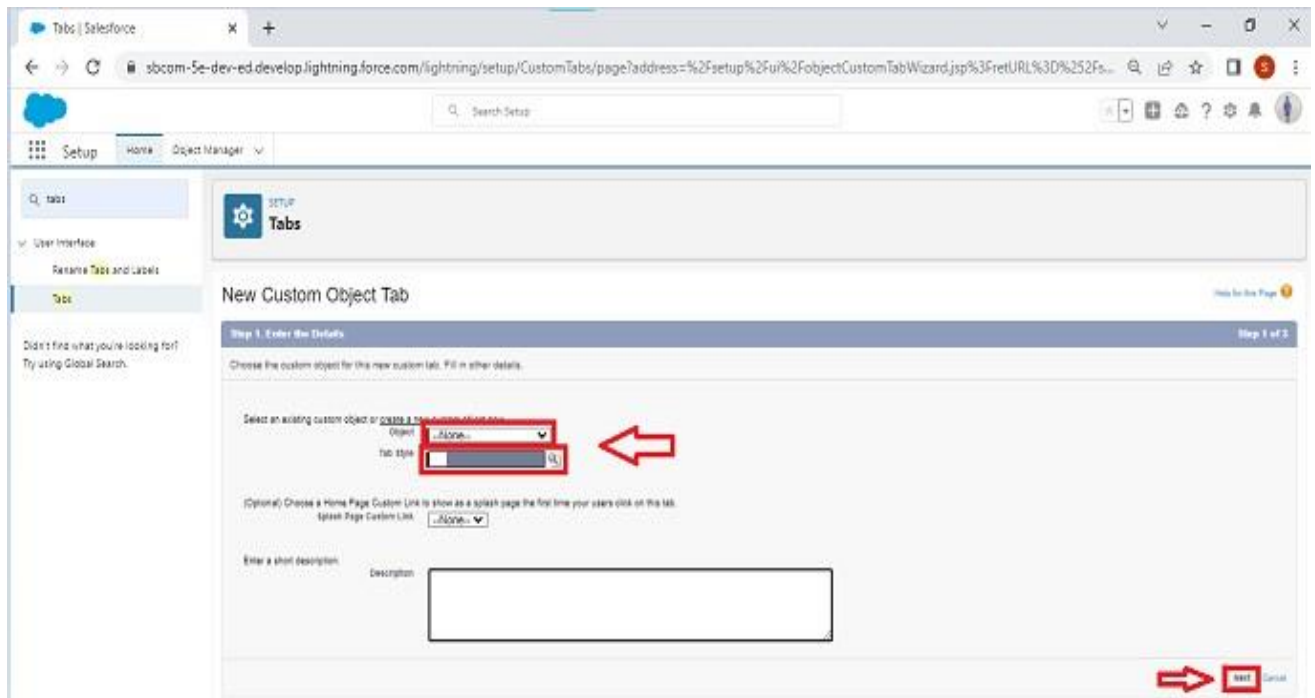
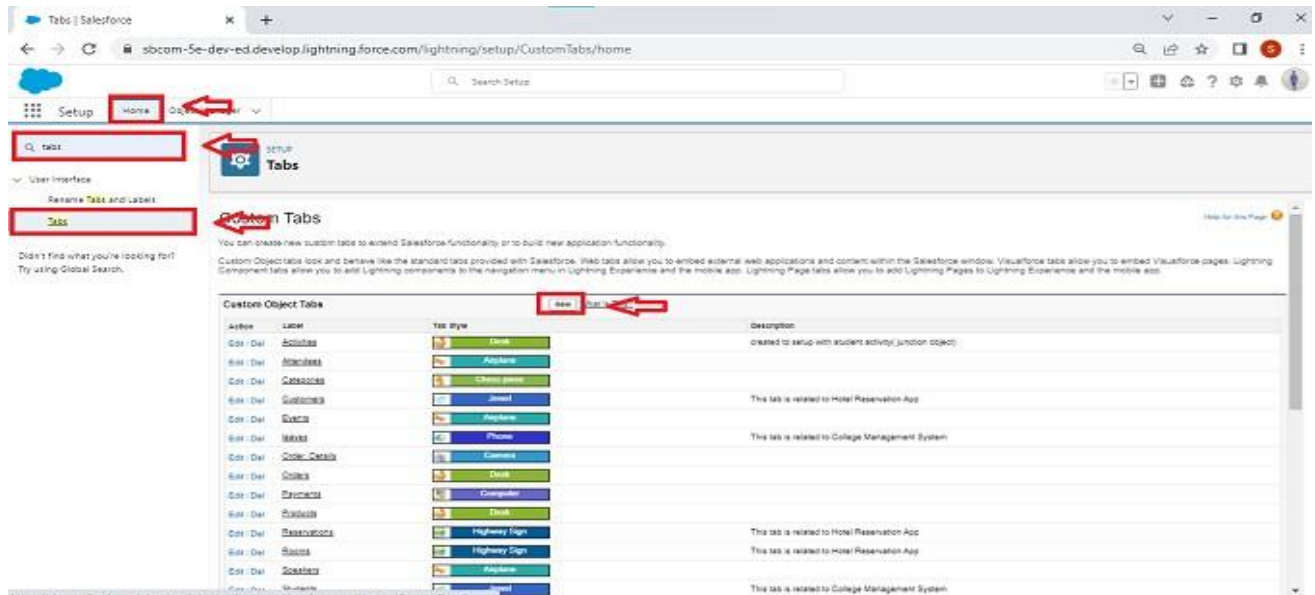
☒ Allow Records

☐ Allow Activities

☐ Track Field History

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.

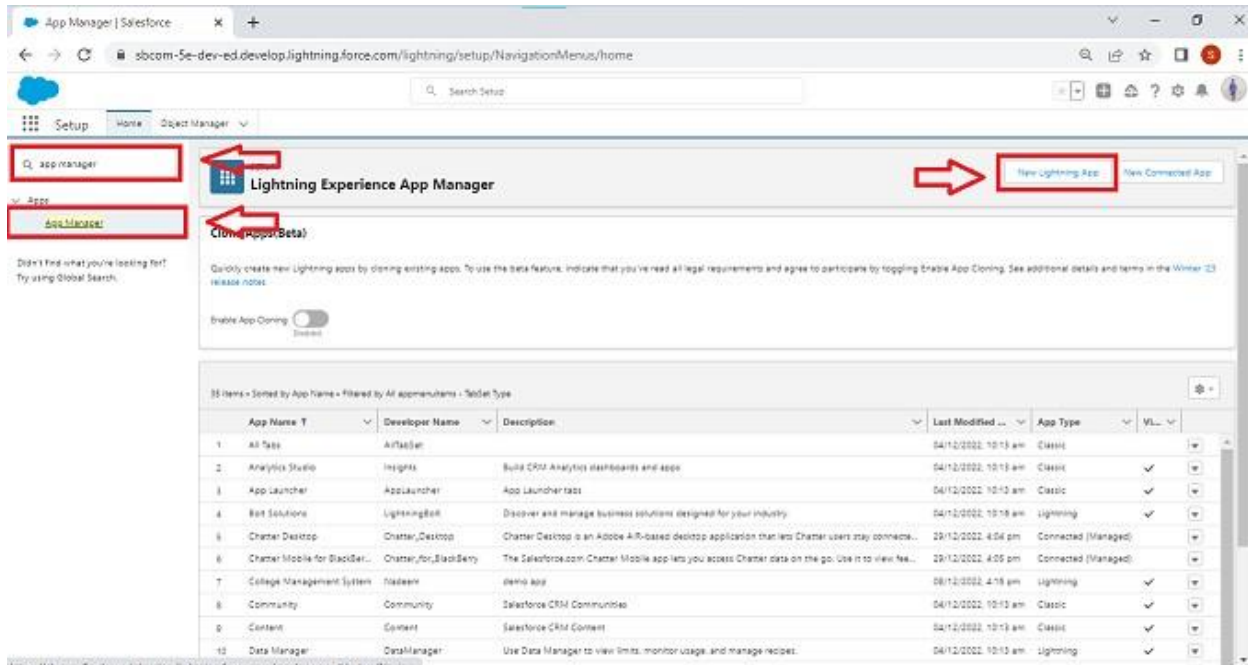
1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

## **MILESTONE-3: LIGHTNING APP**

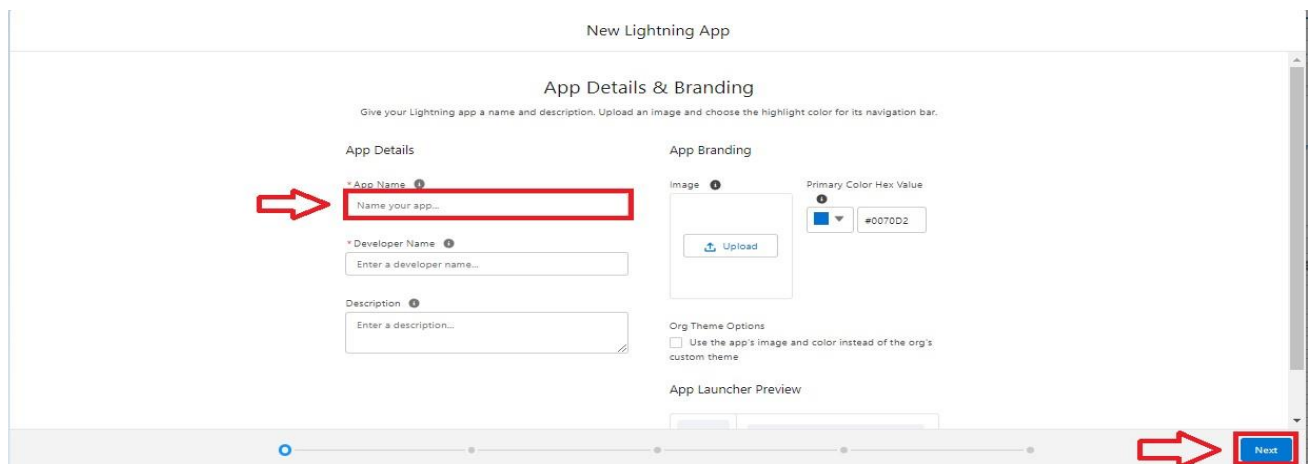
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

## ACTIVITY:

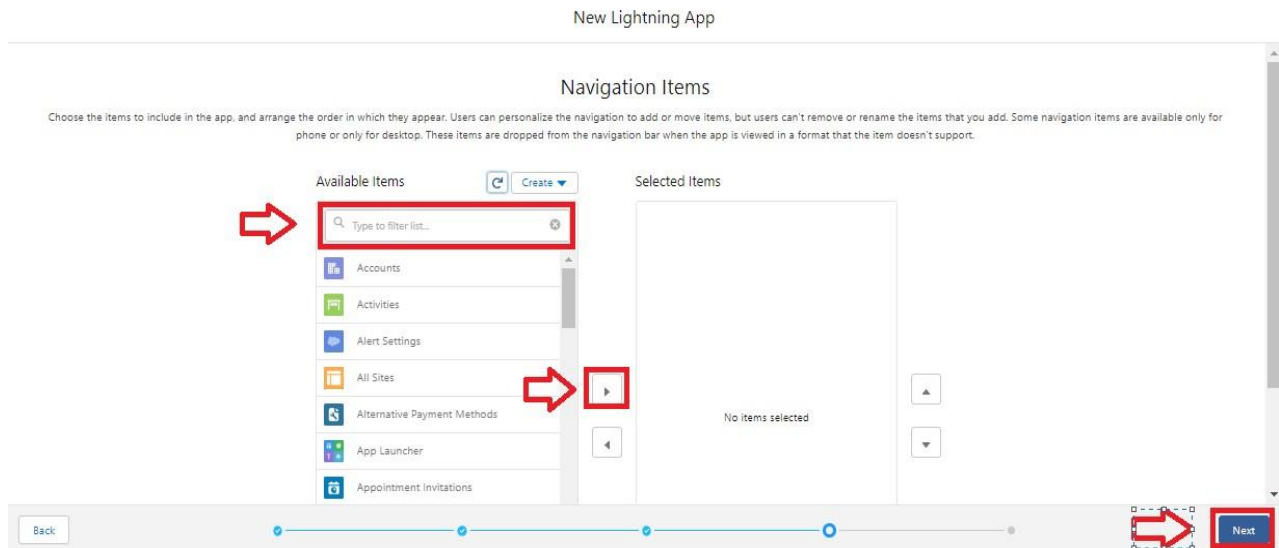
### CREATE THE SCHOOL MANAGEMENT APP



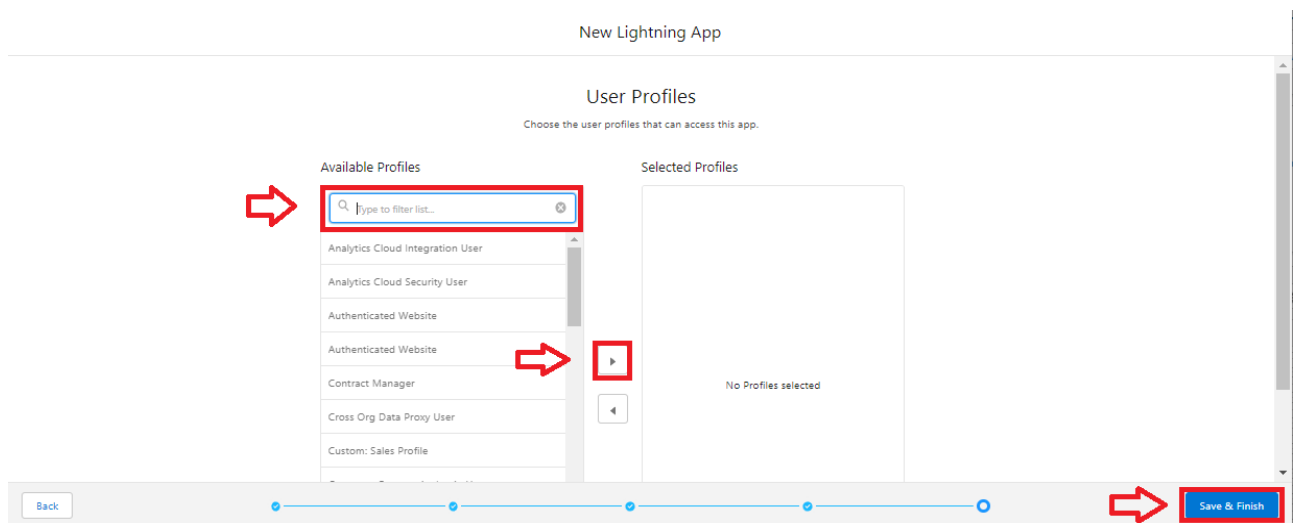
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter School Management as the App Name, then click next.



- 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.



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

### Note:

1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

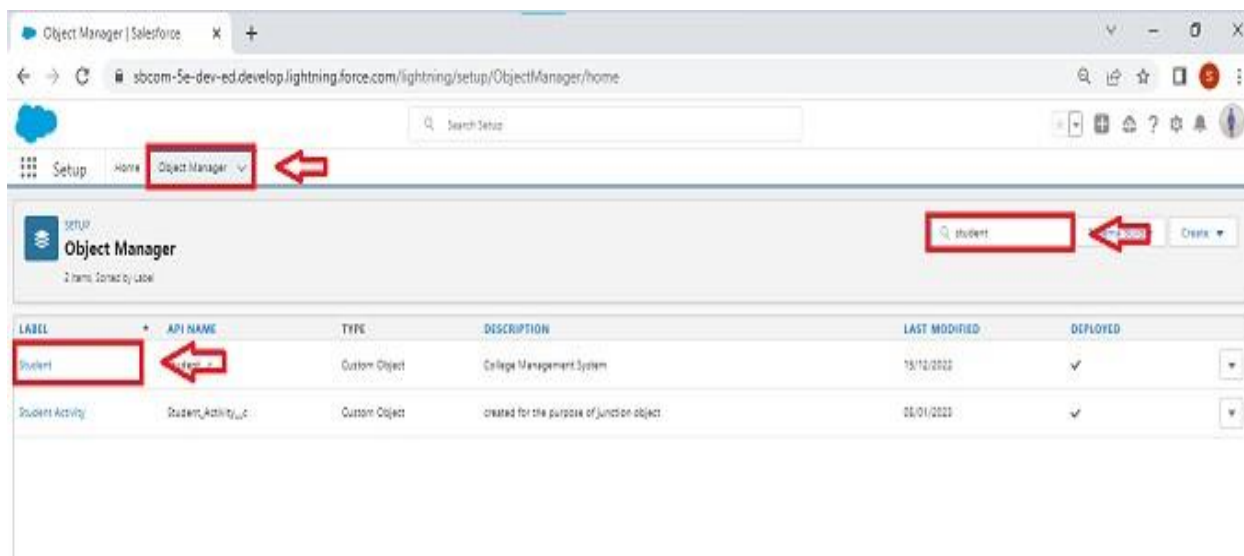
## MILESTONE -4: FIELDS AND RELATIONSHIP

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.

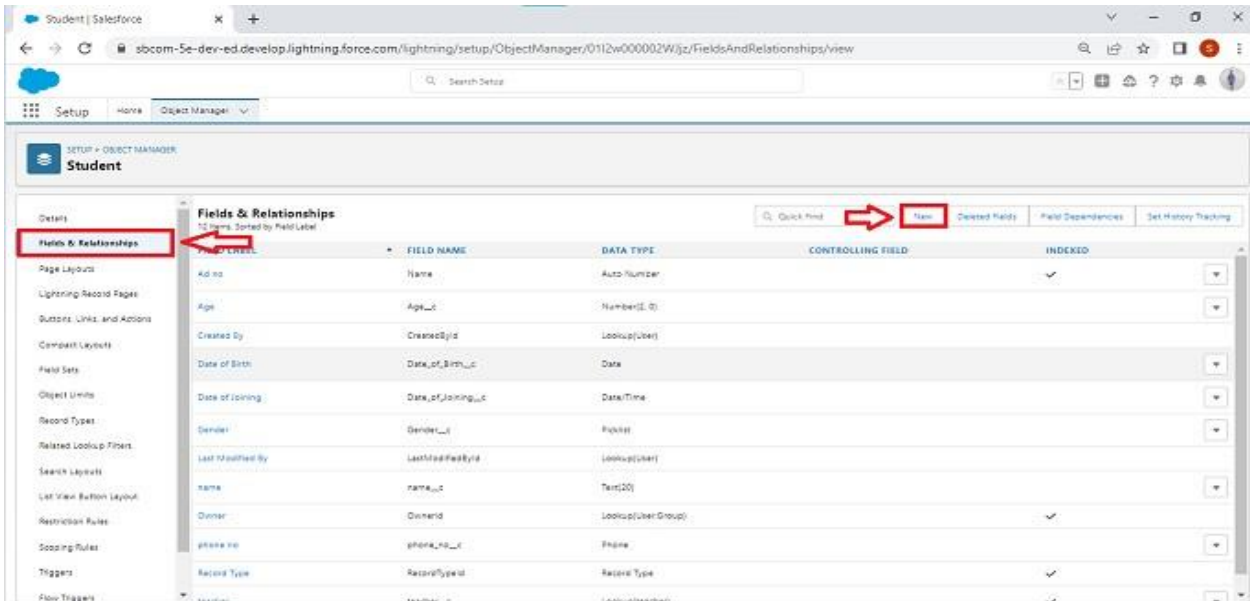
### ACTIVITY-1:

#### 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.



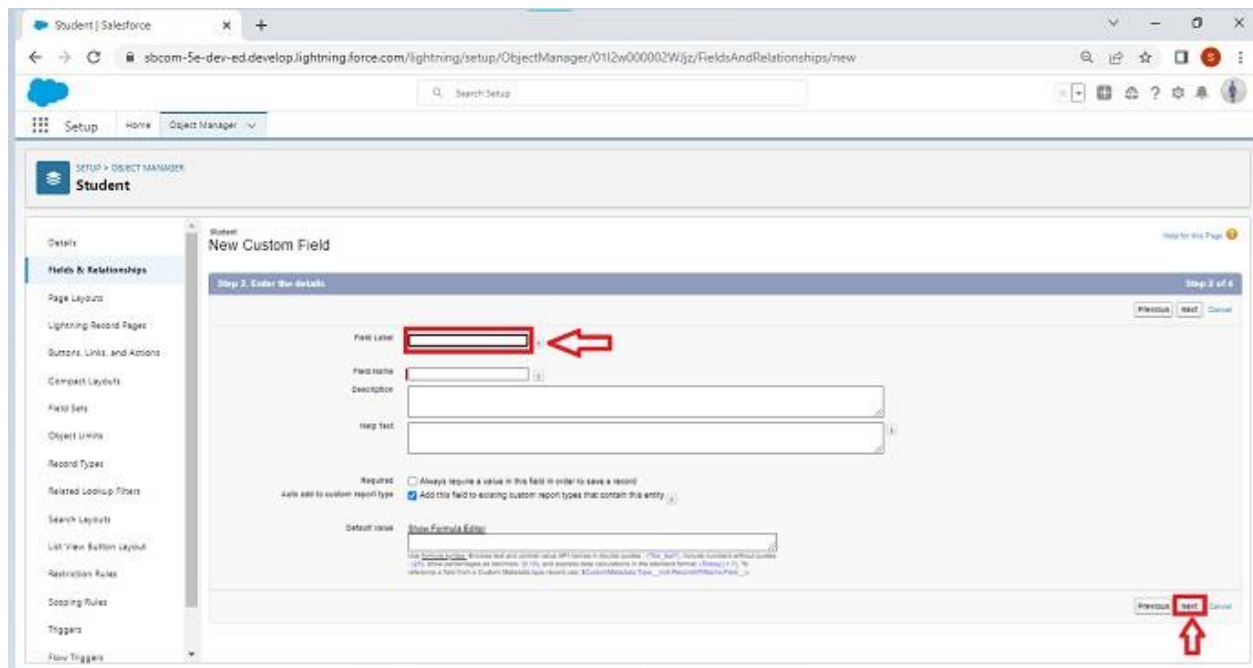
- Select School.
- Select Fields & Relationships from the left navigation, and click New.



Now we're ready to make a custom field. Let's do this!

- Select the Text Area as the Data Type, then click Next.
- For Field Label, enter Address.
- Click Next, Next, then Save & New.

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

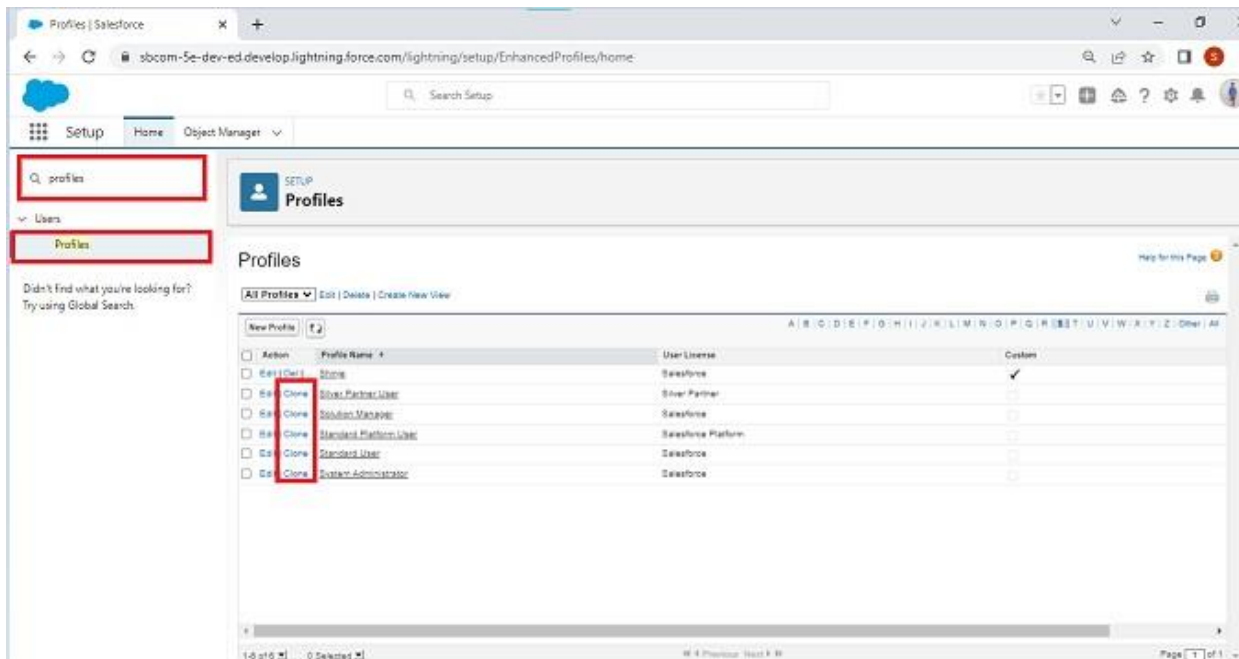
A profile is **a group/collection of settings and permissions that define what a user can do insalesforce**. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types,Login hours & Login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

### ACTIVITY:

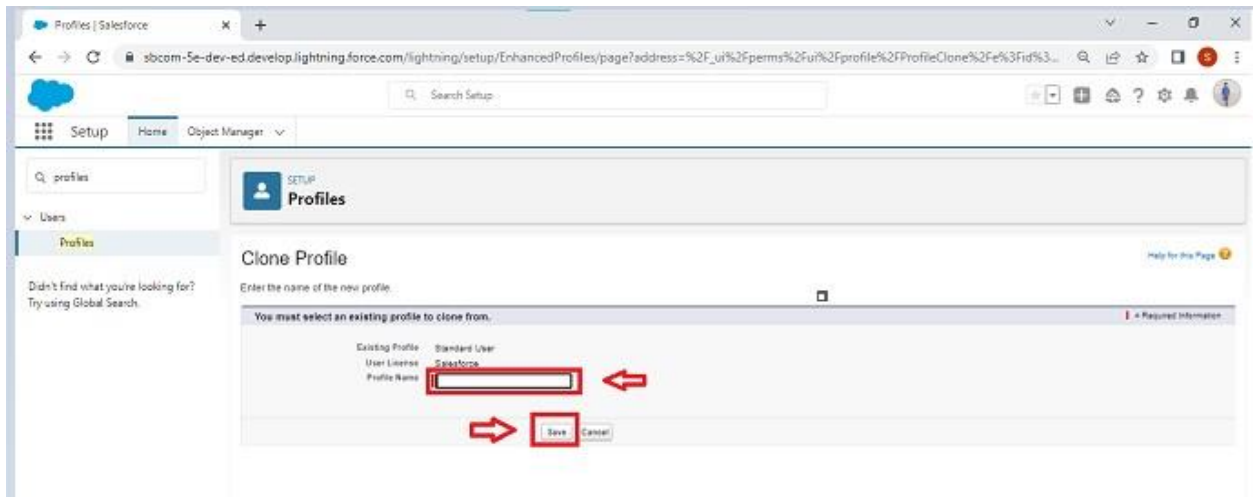
#### CREATION ON PROFILE:

From Setup enter Profiles in the Quick Find box, and select Profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.



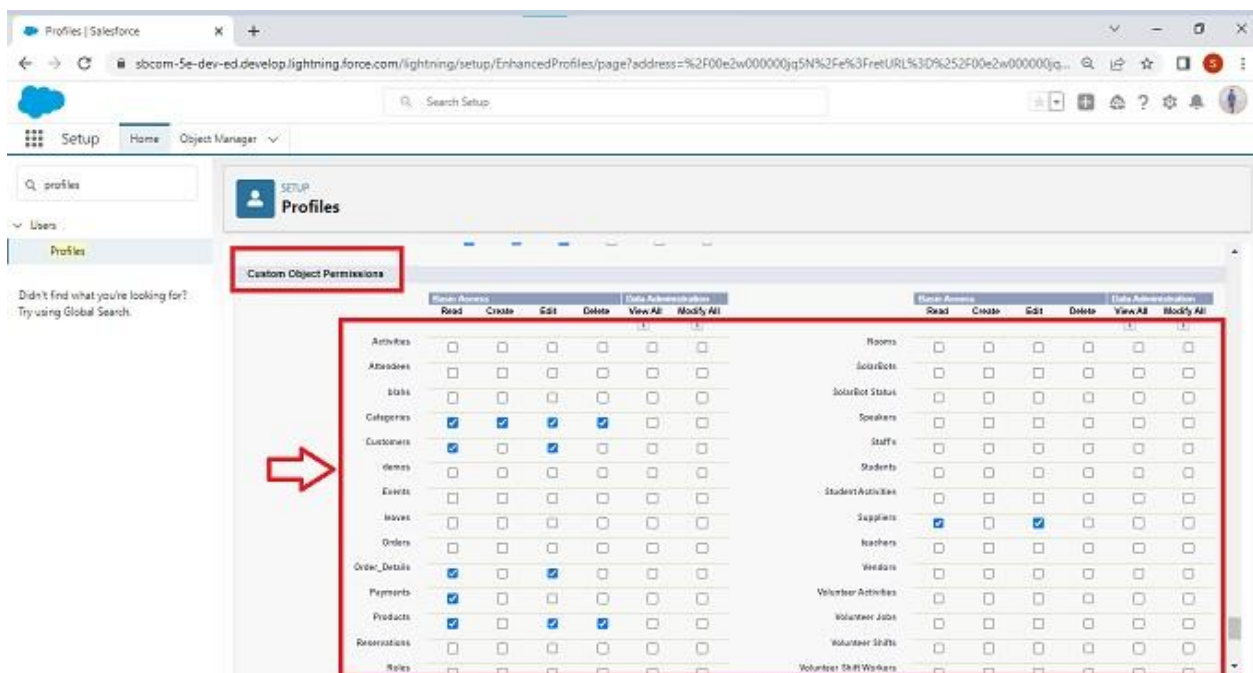
3. For Profile Name, enter School profile.



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



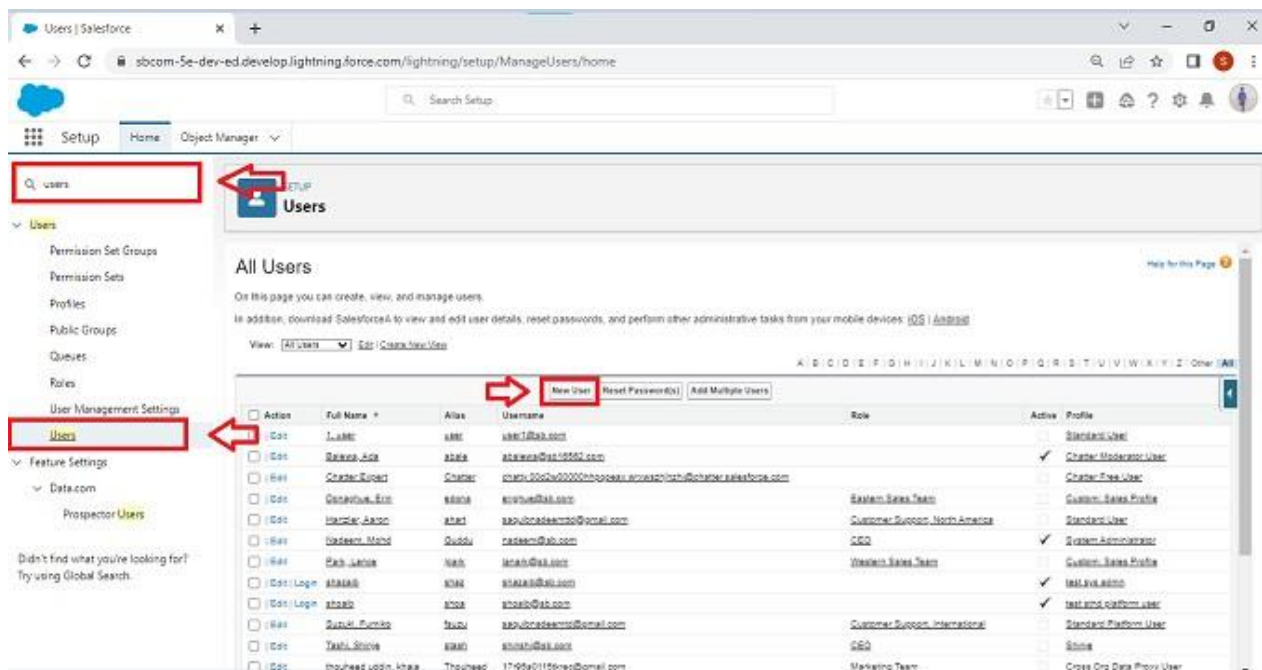
## MILESTONE-6: USERS

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

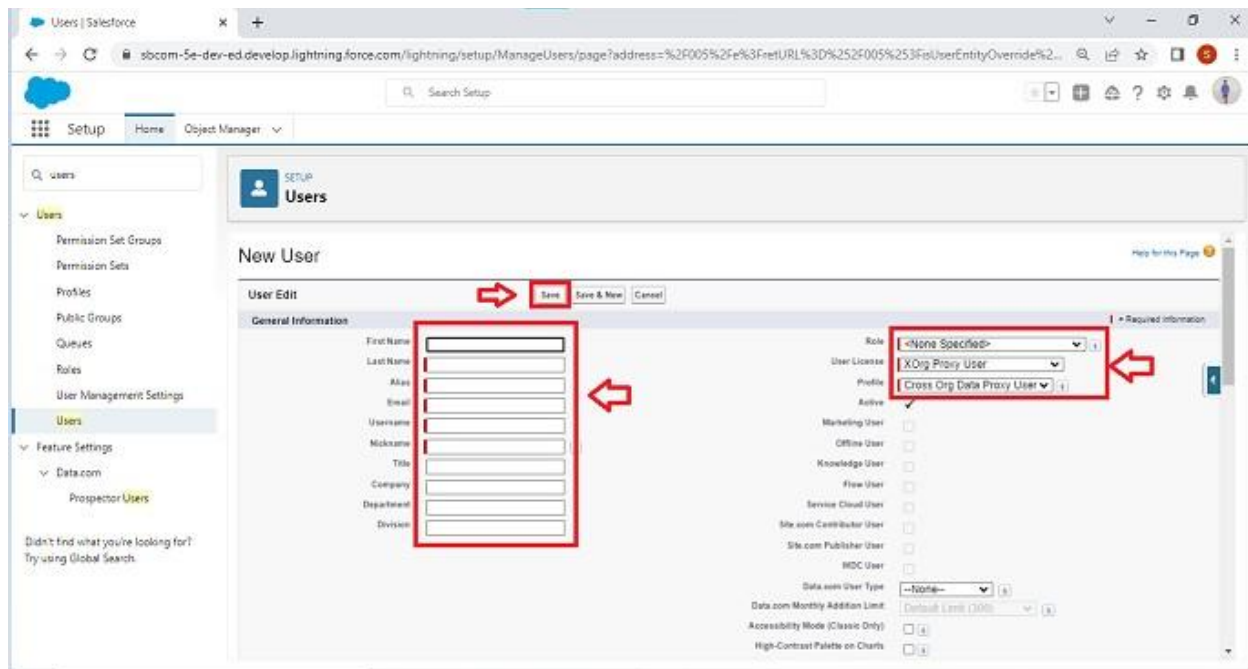
### ACTIVITY:

#### 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 loginname and a temporary password emailed to your email.



7. Similarly follow the above steps and create 3 users as Teachers and principals.

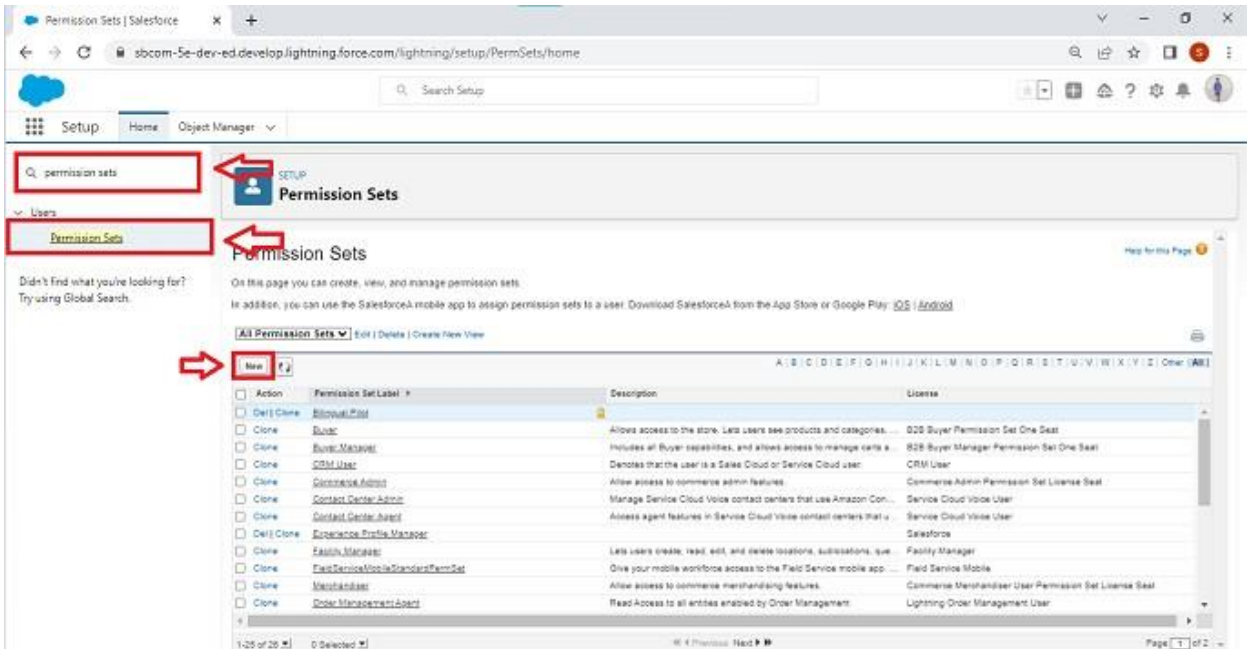
## MILESTONE-7:PERMISSION SETS

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.

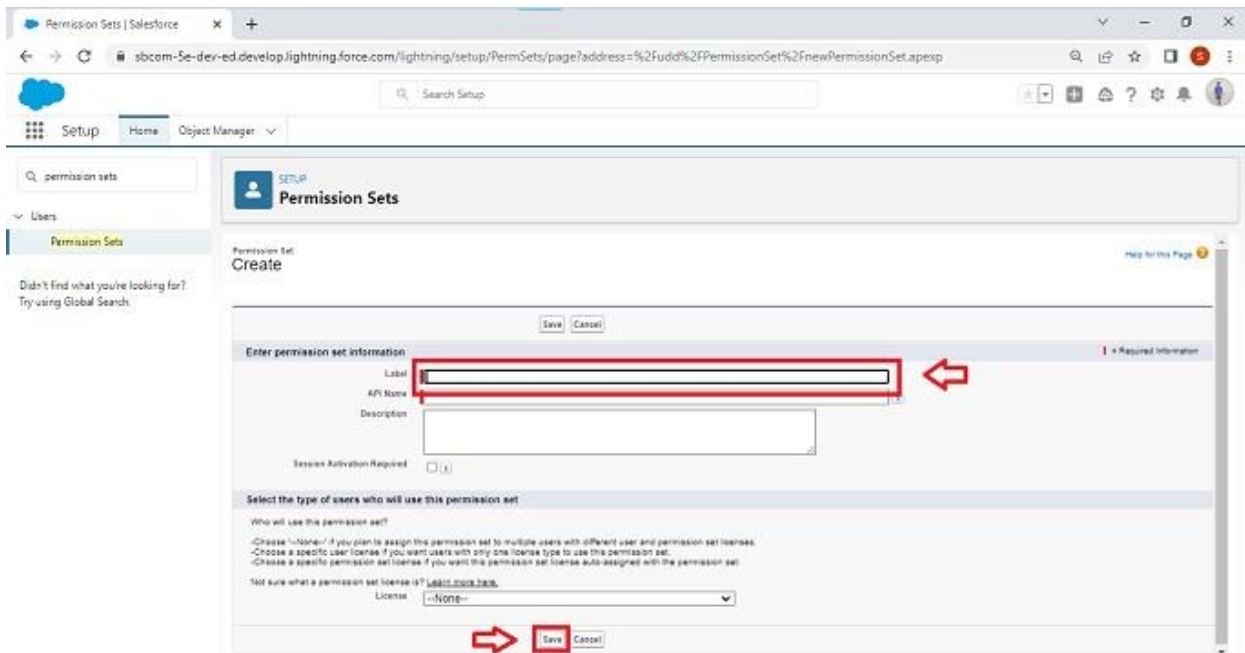
### ACTIVITY-1:

#### 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



Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page/address=%2F0PS2w000006svw7

Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

### Permission Sets

teacher permission

Find Settings... Clone Delete Edit Properties **Manage Assignments**

**Permission Set Overview**

Description	API Name	teacher_permission
License	Namespace Prefix	
Session Activation Required	Created By	Mahesh Nairam
Last Modified By	Created	23/01/2023, 2:28 pm

**Apps**

- Assigned Areas**  
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"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**  
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS2w000006svw7/PermissionSetAssignment/home

Setup Home Object Manager

permission sets

Users

Permission Sets

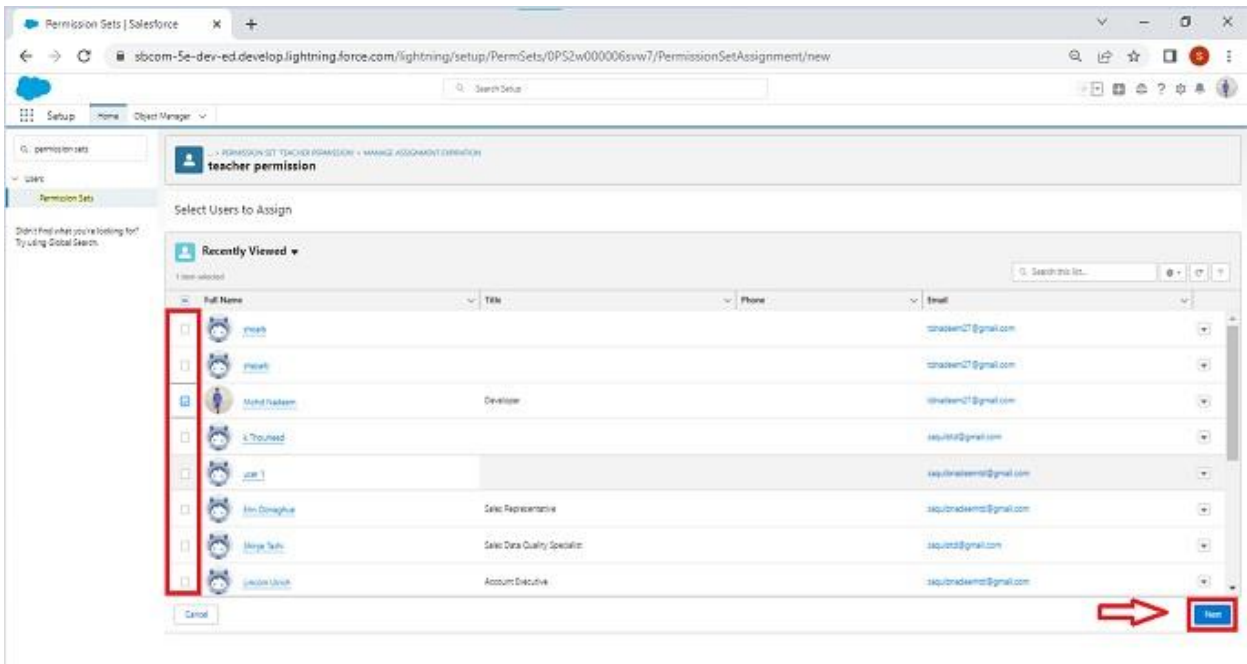
Didn't find what you're looking for? Try using Global Search.

### teacher permission

**Current Assignments**

**Add Assignment**

No assignments defined.



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

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

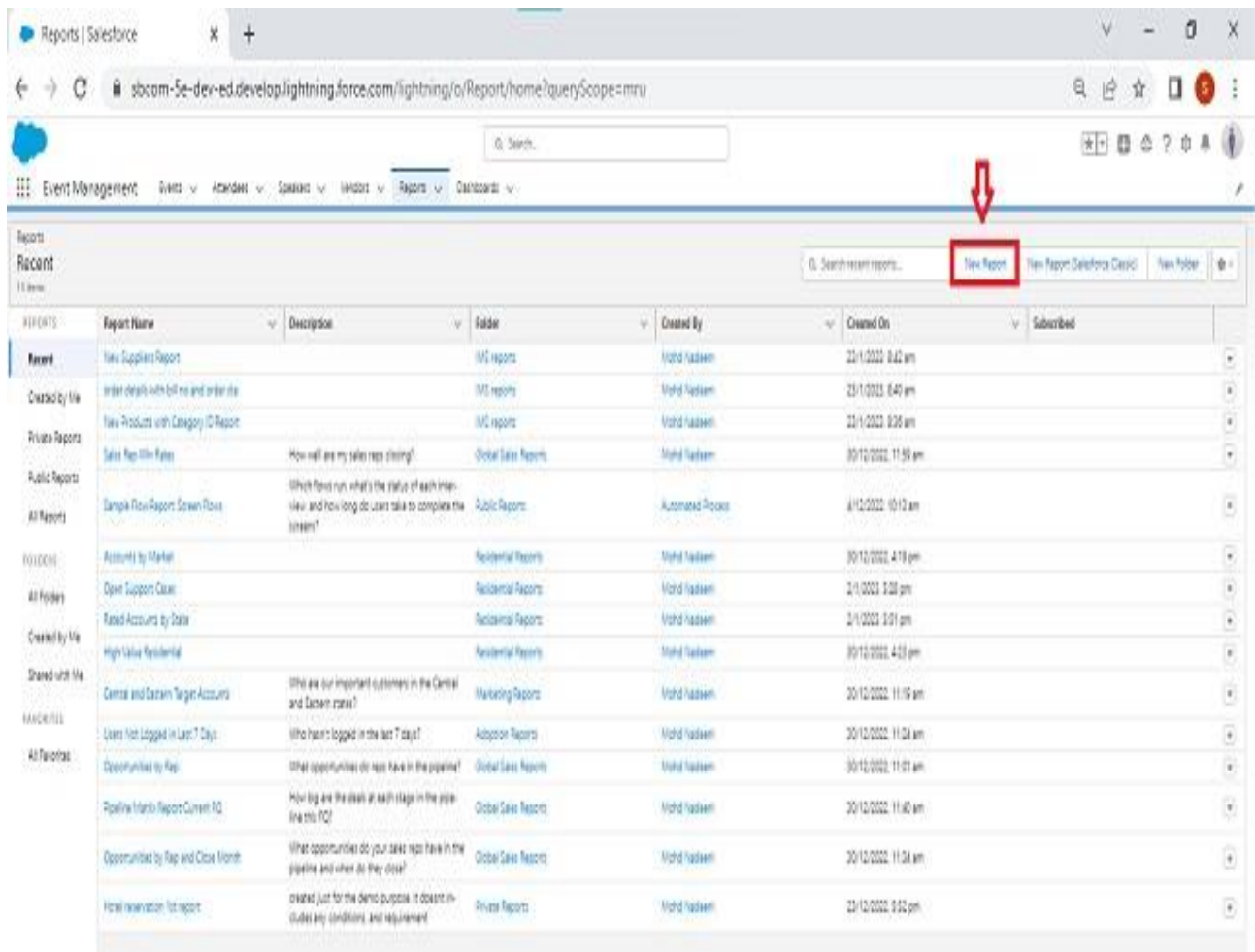


chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

## ACTIVITY:

## REPORTS :

1. From the Reports tab, click New Report.



The screenshot shows the Salesforce Reports interface. The 'New Report' button is highlighted with a red box, and a red arrow points to it from above. The interface includes a search bar, a list of recent reports, and a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Suppliers Report		MS reports	Mohd Hashem	23/1/2023 8:42 am	
Created by Me	order details with bill no and order no		MS reports	Mohd Hashem	23/1/2023 8:49 am	
Private Reports	New Products with Category ID Report		MS reports	Mohd Hashem	23/1/2023 8:56 am	
Public Reports	Sales Rep 30m Poles	How well are my sales reps doing?	Global Sales Reports	Mohd Hashem	30/12/2022 11:59 am	
All Reports	Sample Flow Report Screen Flow	Which flows run, what's the status of each interview and how long do users take to complete the screens?	Public Reports	Automated Process	6/12/2022 10:12 am	
COLLON	Accounts by Market		Residential Reports	Mohd Hashem	30/12/2022 4:19 pm	
All Reports	Open Support Cases		Residential Reports	Mohd Hashem	2/1/2023 2:28 pm	
Created by Me	Ranked Accounts by Data		Residential Reports	Mohd Hashem	2/1/2023 2:31 pm	
Shared with Me	High Value Residential		Residential Reports	Mohd Hashem	30/12/2022 4:23 pm	
MARKET	Central and Eastern Target Accounts	What are our important customers in the Central and Eastern zones?	Marketing Reports	Mohd Hashem	20/12/2022 11:15 am	
All Favorites	Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Hashem	20/12/2022 11:24 am	
	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Hashem	30/12/2022 11:57 am	
	Pipeline Trends Report Current IQ	How long are the deals in each stage in the pipeline this IQ?	Global Sales Reports	Mohd Hashem	20/12/2022 11:42 am	
	Opportunities by Rep and Close Month	What opportunities do your sales rep have in the pipeline and when do they close?	Global Sales Reports	Mohd Hashem	20/12/2022 11:54 am	
	Hotel reservation list report	created just for the demo purpose. it doesn't include any conditions and requirement	Private Reports	Mohd Hashem	23/12/2022 9:53 pm	

2. Select the report type as School with students and parents for the report, and click Create.

The screenshot shows the Salesforce Report Builder interface. At the top, there's a navigation bar with 'Event Management', 'Sales', 'Accounts', 'Spreadsheets', 'Reports', and 'Dashboards'. Below this, the report title 'New Accounts Report' is displayed. A table of account data is shown with columns: Last Activity, Account Owner, Account Name, Billing Status/Province, Type, Rating, and Last Modified Date. A red arrow points to the 'Save' button in the top right corner.

Last Activity	Account Owner	Account Name	Billing Status/Province	Type	Rating	Last Modified Date
1	Mohd Nazeem	United Oil & Gas, Singapore	-	Customer - Direct	Medium	18/01/2023
2	Mohd Nazeem	United Oil & Gas, US	-	Customer - Direct	Medium	18/01/2023
3	Mohd Nazeem	University of Arizona	-	Customer - Direct	Warm	18/01/2023
4	Mohd Nazeem	Widney Hotel Household	-	Residential	Hot	18/01/2023
5	Mohd Nazeem	Alimony Hotel Household	-	Residential	Hot	18/01/2023
6	Mohd Nazeem	Home partner	-	Customer - Direct	Warm	18/01/2023
7	Mohd Nazeem	gms residential	-	Installation Partner	Cold	18/01/2023
8	Mohd Nazeem	Pat Health Household	-	Residential	Cold	18/01/2023

The screenshot shows the 'Create Report' dialog box. On the left, the 'Category' dropdown is set to 'Accounts'. In the center, the 'Report Type Name' dropdown is set to 'Accounts'. On the right, the 'Start Report' button is highlighted with a red box. Below the 'Start Report' button, there's a section titled 'Created By You' with a list of reports: 'Accounts by Market' (Last Used 1/3/2023), 'Rated Accounts by State' (Last Used 1/2/2023), and 'High Value Residential' (Last Used 1/2/2023). Below this, there's a section titled 'Created By Others' with the text 'No Reports Yet'. At the bottom, there's a section titled 'Objects Used in Report Type' with a list of objects: 'Role', 'Account', 'Operating Hours', and 'Asset'.

### 3. Customize your report, then save or run it.

The screenshot shows the Salesforce Report Builder interface. The browser tab is 'Report Builder | Salesforce'. The URL is 'sbcsm-5e-der-ed.develop.lightning.force.com/one/one.app#eyJjb21wb251bnREZWYyOjYyZX8vcmRzOnlhcG9ydE1aWkZXRlCjhdHRYsWj1dGVzjp7InlY29yZEBkjoil...'. The page title is 'New Accounts Report / Accounts'. The report is in 'Preview' mode, showing a table of account data. A red arrow points to the 'Save & Run' button in the top right corner.

REPORT \*  
New Accounts Report / Accounts

Save & Run Run Clear Run

Previewing a limited number of results. Run the report to see everything. Update Preview Automatically

Last Activity	Account Owner	Account Name	Billing Status/Province	Type	Rating	Last Modified Date
1	Markus Nielsen	United Oil & Gas, Singapore	-	Customer - Direct	Medium	18/07/2023
2	Markus Nielsen	United Oil & Gas, US	-	Customer - Direct	Medium	18/07/2023
3	Markus Nielsen	University of Arkansas	-	Customer - Direct	Warm	18/07/2023
4	Markus Nielsen	Whitney Taylor Household	-	Residential	Hot	18/07/2023
5	Markus Nielsen	Whitney Taylor Household	-	Residential	Hot	18/07/2023
6	Markus Nielsen	Henry Jensen	-	Customer - Direct	Warm	18/07/2023
7	Markus Nielsen	gms verduyn	-	Residential Partner	Cold	18/07/2023
8	Markus Nielsen	Pat Heath Household	-	Residential	Cold	18/07/2023

