

# CRM APPLICATION FOR SCHOOLS/COLLEGES



DONE BY

S.DHINESH

A.BHUVANESHWARI

P.THABIKA

P.YOGAPRIYA

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

## **1 INTRODUCTION**

### **1.1 OVERVIEW**

#### **Project Description**

This 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

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 as 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/r9EX31Gde5K>

## 1.2 PURPOSE

An customer relationship management (CRM) manages the school and colleges and institution's interactions with prospective and current students. It also supports managing communications with alumni, employees, donors, and other member of the education sector in your school.

School education CRM software collects essential customer information from different channels and stores it in a single easy-to-access database. Some of the information a CRM system might collect includes.

- Name
- Age
- Gender

- Educational background
- Contact information

Using this data, you can personalize messages for your students across all channels.

CRM higher education technology enables institutions to manage relationships with all of their customers (including students, alumni, faculty, staff, and corporate partners) and connect insights from those interactions in a unified view.

CRM is a school application technology for managing all your school relationships 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.

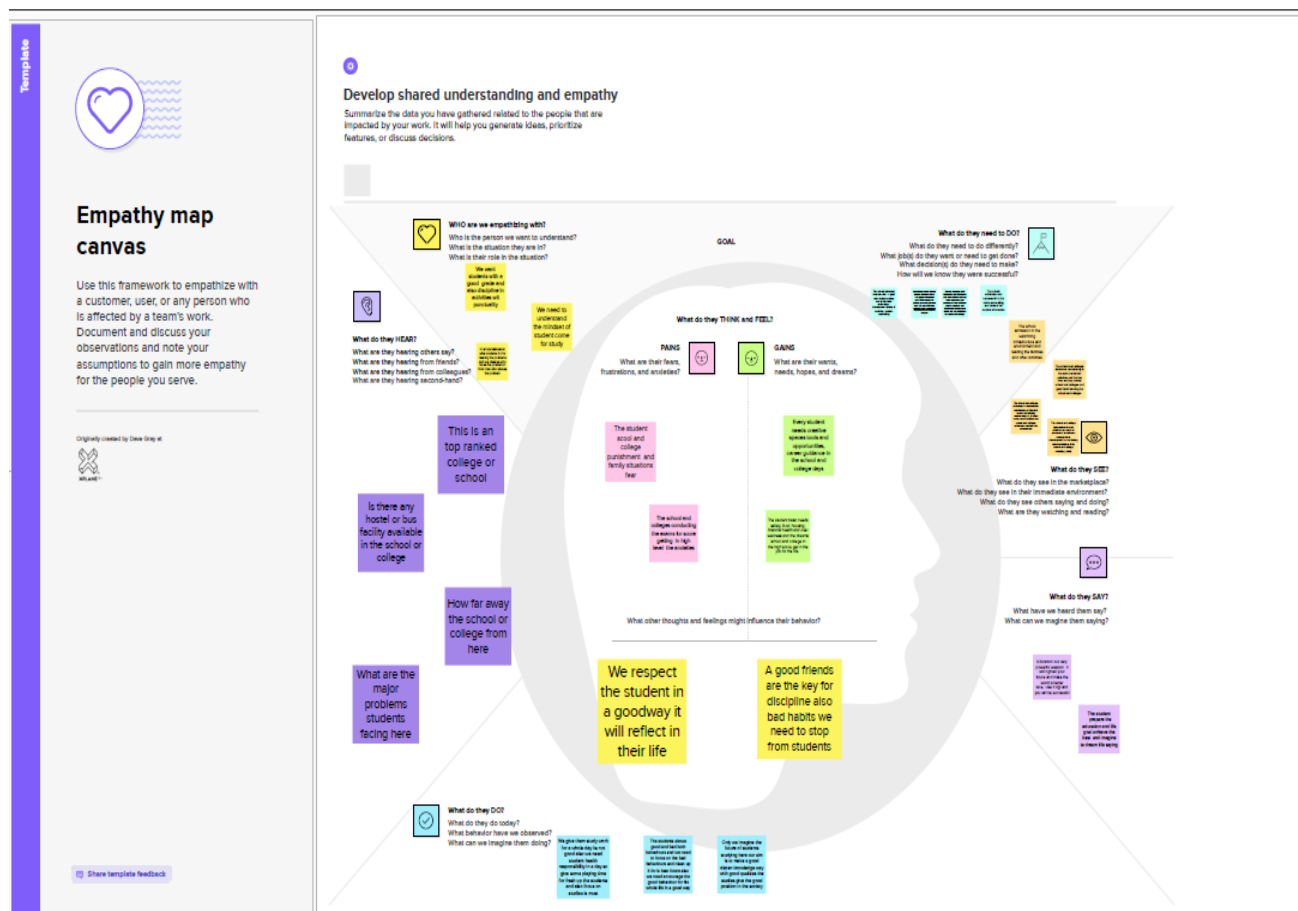
A CRM system can help educational organisations effectively manage and track leads ,resulting in improved enrollment numbers

## Achieves:

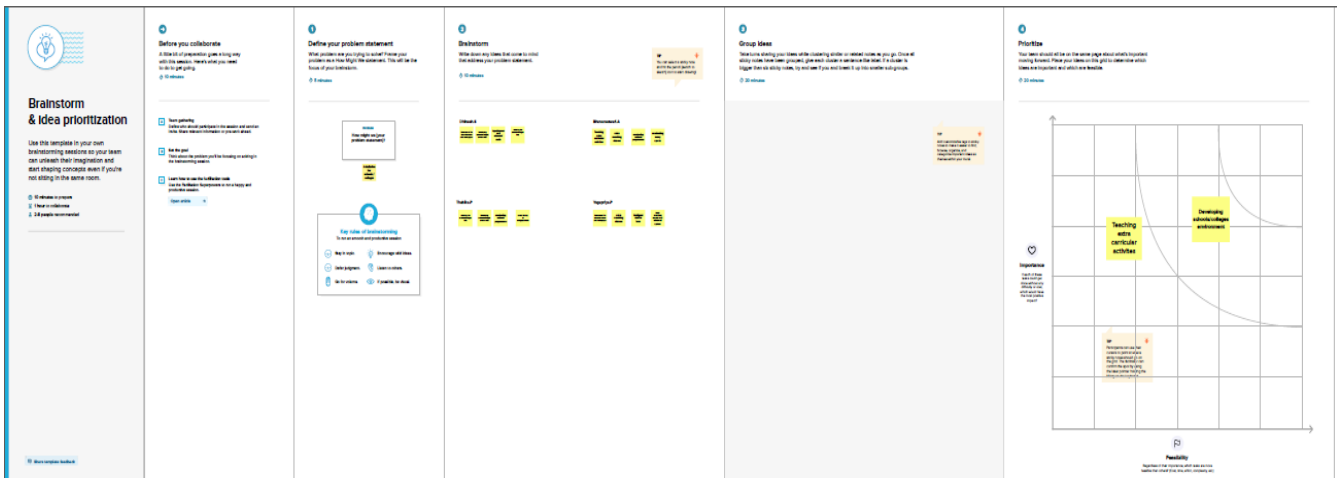
In the project achieves the tasks:

- Creating Developer Account
- Creation on School, Student, Parent Object
- Create the School Management App
- Creation for the field for the School, Student, Parent Objects
- Creation on Profile
- Creating a Users
- Permission Sets
- Reports
- CRM is a system help schools manage the entire lifecycle of a potential customer
- CRM can track and store and the data that's important to your operation all in one easy-to-access place

## 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



## 3 RESULT

### 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 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:

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.

## Create Report

**Category**

Recently Used

**All**

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

**Select a Report Type**

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with SolarBots	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard
Opportunities with Contact Roles	Standard
Opportunities with Partners	Standard
Opportunities with Competitors	Standard
Opportunity History	Standard
Opportunity Field History	Standard
Opportunity Trends	Standard

**Details**

**Accounts**  
Standard Report Type

**Start Report**

**Details** Fields (71)

**Created By You**

- Accounts by Market  
Last Used 1/3/2023
- Rated Accounts by State  
Last Used 1/2/2023
- High Value Residential  
Last Used 1/2/2023

**Created By Others**  
No Reports Yet

**Objects Used in Report Type**

- Role
- Account
- Operating Hours
- Asset

Reports | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mnv

Event Management | Events | Attendees | Speakers | Vendors | **Reports** | Dashboards

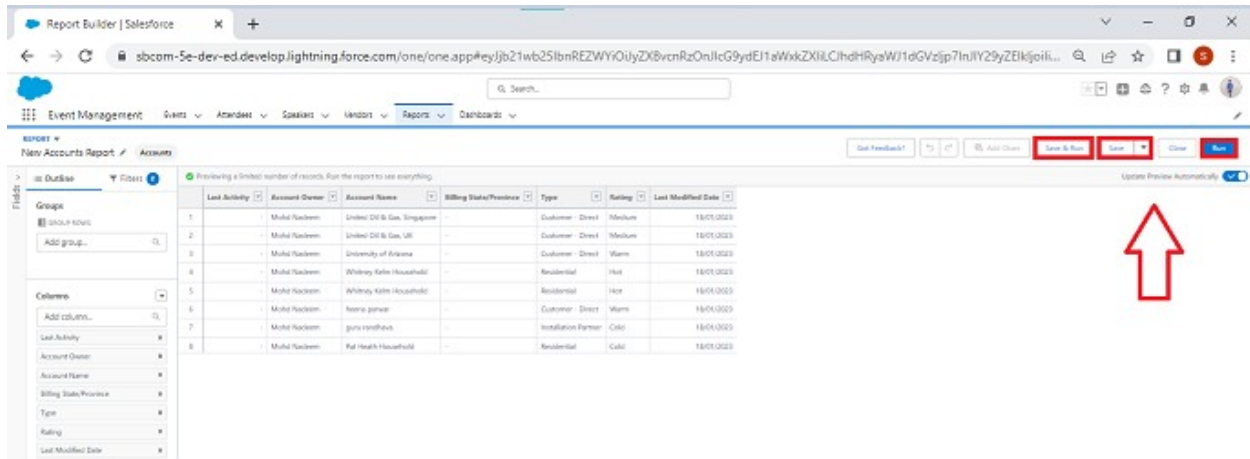
Search...

**Reports**  
Recent  
15 items

Search recent reports... **New Report** New Report Salesforce Classic New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	New Suppliers Report		IMS reports	Mohd Nadeem	22/1/2022 8:42 am	
Created by Me	Order details with bill no and order sta		IMS reports	Mohd Nadeem	23/1/2022 8:40 am	
Private Reports	New Products with Category ID Report		IMS reports	Mohd Nadeem	22/1/2022 8:38 am	
Public Reports	Sales Rep Win Rates	How well are my sales reps closing?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:59 am	
All Reports	Sample Flow Report Screen Flows	Which flows run, what's the status of each inter-view, and how long do users take to complete the screens?	Public Reports	Automated Process	4/12/2022 10:10 am	
FOCUS	Accounts by Market		Residential Reports	Mohd Nadeem	30/12/2022 4:19 pm	
All Folders	Open Support Cases		Residential Reports	Mohd Nadeem	2/1/2022 3:28 pm	
Created by Me	Rated Accounts by State		Residential Reports	Mohd Nadeem	2/1/2022 3:01 pm	
Shared with Me	High Value Residential		Residential Reports	Mohd Nadeem	30/12/2022 4:23 pm	
MARKETING	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Mohd Nadeem	30/12/2022 11:15 am	
ALL FAVORITES	Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Nadeem	30/12/2022 11:24 am	
All Favorites	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:01 am	
	Pipeline Info Report Current FQ	How big are the deals at each stage in the pipeline this FQ?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:40 am	
	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:34 am	
	Hotel reservation list report	created just for the demo purpose. It doesn't include any conditions, and requirement	Private Reports	Mohd Nadeem	22/12/2022 9:52 pm	

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



The screenshot shows the Salesforce Report Builder interface. At the top, there's a navigation bar with tabs like 'Event Management', 'Events', 'Attendees', 'Speakers', 'Vendors', 'Reports', and 'Dashboards'. Below this, a search bar and a 'Get Feedback' button are visible. The main area displays a report titled 'New Accounts Report' with columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. A red arrow points to the 'Run' button in the top right corner of the report preview area.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1		Mohd Nadeem	United Oil & Gas, Singapore		Customer - Direct	Medium	18/01/2023
2		Mohd Nadeem	United Oil & Gas, UK		Customer - Direct	Medium	18/01/2023
3		Mohd Nadeem	University of Exeter		Customer - Direct	Warm	18/01/2023
4		Mohd Nadeem	Whitney Kelle Household		Residential	Hot	18/01/2023
5		Mohd Nadeem	Whitney Kelle Household		Residential	Hot	18/01/2023
6		Mohd Nadeem	Neema garwal		Customer - Direct	Warm	18/01/2023
7		Mohd Nadeem	guru ramphals		Insulation Farmer	Cold	18/01/2023
8		Mohd Nadeem	Pat Heath Household		Residential	Cold	18/01/2023

## 4 ADVANTAGES & DISADVANTAGES

### ADVANTAGES:

#### 1. TRACK AND RECURIT FOR MORE ADMISSIONS

The School Education CRM for educational institutions helps them to target their prospective students and audiences. The education CRM software helps to automate their student recruiting cycle. The institutions can run email campaigns to track them.

#### 2. Lead tracking and allocation

The school education CRM for school education helps to find out sources of incoming leads. These sources can be bifurcated in different lead sources. The overall information is available on a single platform.

#### 3. School Follow ups

The School education CRM software helps them to enhance the interaction, marketing campaigns etc. It enables the counselor to keep reminders against every enquiry and every lead. Auto notifications help them to follow the prospects without letting go the chance to speak to them.



#### 4. Scheduling of courses and fees reminders

The school education CRM software helps to track the overall activities related to student counselling and offered courses with their assigned fee structure. The CRM helps them to maintain the overall data of the student for future references.

#### 5. Tracking of student's Enrollment & Admission

CRM maintains centralized processed data which helps the educational hubs to manage the complete data of prospective students and helps in managing the record for Enrolled and admitted students

1. Store and manage complete details of student's batch, roll no. and contact details etc.
2. Structured records can be used for future references.

#### 6. Consolidation

A quality CRM for higher education will enable the university to streamline its communication efforts across the entire student lifecycle 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.

#### 7. Reporting

Historically, gathering data and inputting it into a report was something of an arduous and time consuming task. Inbuilt reporting systems mean

individuals and departments can do away with spreadsheets and access reports instantaneously. This will allow them to make informed changes to strategy more quickly.

## 8. Saving time

Time freed up on admin tasks can be channeled into creating targeted and meaningful content. Automated email marketing system campaigns can do wonder to boost engagement. They can be scheduled for different stages of the admissions process and segmented according to things like academic subject and level of study. Automation of these processes allow for staff to focus on more specialized areas.

## 9. Consistency

Messages in the form of emails and calendar invites delivered in a consistent timely way can help universities to drive academic results as well as donations. Regular communication helps the university to establish itself at the forefront of the stakeholder's mind pre and post-graduates!

## 10. Recruitment

Conventional marketing wisdom says consumers have to engage with brand's marketing message at least seven time before they commit to purchasing a product. Similar buying behaviors are exhibited in students when looking for the best higher education institution for their needs.

With the correct tool, a university can build and implement an excellent student recruitment campaign. Having access to data highlighting the most (and least) engaged applicants can help the admissions team target the right candidate at exactly the right time, ensuring the best applicants reach enrollment.

## 11. Monitor Fee Payments and Reminders

In every academic year, the school education have to chase the payments of fees from the students and their guardians. With the help of a mobile app, CRM software can keep track of all the fee payment and even send reminders to those who haven't paid their fees on time.

This fee payment and reminder process are critical for the institute to maintain its cash and keep the academic year on track. With the help of CRM software the institute can save a lo of time and resources, which would otherwise be spent manually keeping track of fee payments and sending reminders.

## 12. Simplify the admission procedure

The use of CRM software for admissions facilitates the process because it can organize student documents and screen admission applicants. It saves the time of admission staff, enabling them to direct their focus to other stages of admissions, such as interviews. Beside facilitating the admission staff, educational CRM systems .

### MORE ADVANTAGES:

- ✓ Beneficial for different department or teams of the business
- ✓ Customers are engaged across multiple channel
- ✓ Provide stream line operations
- ✓ Improve customer service
- ✓ Data mining
- ✓ Helps in increasing sales
- ✓ CRM made targeting and marketing and marketing simple
- ✓ Improve decision making and productivity

- ✓ CRM growing scope in the market
- ✓ Centralized data makes everything convenient
- ✓ Tracking of customer data
- ✓ It can speed up the sales conversion process
- ✓ It enable widely dispersed teams to work closely

## DISADVANTAGES:

### 1. A Costly Project

CRM software tool is expensive that some school application can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data mitigation, integration cost, training, and support also effect.

Even for a locally hosted customer relationship management system, the school sector is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

### 2. Loss of Collected information or records

CRM tools can be responsible for losing the as student information as some CRM software keeps track of student information using remote internet connections. Due to this, sometimes organization needs to have control over the student information especially when a system failure event happens. As unstable CRM can result in the loss of money in revenue for the company in the future.

### 3. It eliminate has the human element

CRM is a fully automated tool that has prevented human intervention. It automatically collects all the data process it. CRM efficiently manages the relationship between the company and customers as it directly interacts between people and its staff. Customers can shift anywhere due to the loss of human touch, reducing sales and revenue.

### 4. CRM is not fully Customized

A business can only customize a CRM system make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

### 5. Have poor usability

Some CRM systems could be more user friendly as users need to learn how to use CRM to save time and energy to make the system work according to them. Some small businesses try to refrain from using CRM as they need help handling it.

### 6. Employee training is a must

CRM installation is fast and easy in the system and is also an exciting experience for the employees as it is a fully automated process where data can be streamlined one place.

But everything changes when its implementation begins as CRM is not fully customized therefore , sometimes implementation doesn't go along with system configuration. Despite being an expert the staff is trained to become accustomed CRM and learn to use it properly.

## 7. Having lots of security concerns

There are many security issues with CRM such as data loss and data being hacked by someone. In CRM, the collected data is stored at one centralized location that can be accessed by unfair means. In another case, inaccurate data can be added employees, or they manipulate figures leading to wrongful planning.

## 8. Centralized data is at stake

In CRM, stored data is not distributed. Otherwise it centralized, which can be a stake or lost due to hackers or unfair means. Whole data is affected when attackers try to steal it, or staff or employees are fed the wrong information.

# 5 APPLICATIONS

## CRM for schools: One platform to scale your Admissions

Unlock your school's potential with india's largest and best school admissions software. Increase your presence and manage parent touch points from enquiry to environment on a single platform

- ✓ Enquiry to Enrollment Funneling
- ✓ 360 degree communication suite

- ✓ Detailed performance Reports
- ✓ Unified Payment Solution

## School Admission Software:

The CRM application for school still its team working in silos with a major dependency on multiple systems. The leads to higher marketing cost, less visibility across the teams, poor parent experience, stagnant school-wise/group level growth, etc.

- ✓ Enquiry Centralisation
- ✓ Dynamic Enquiry Allocation
- ✓ 360 degree communication & Nurturing
- ✓ Unified parent Admission portal
- ✓ Drag and drop Application Form Builder
- ✓ School wise visibility
- ✓ Advanced Reports & Analytics
- ✓ Inbuilt Payment Collection Platform

## Get in depth visibility in real time:

The CRM application school performance with robust Reports & Analytics. Identify the best performing channels, star performers in your team, the bottlenecks, and take strategic calls in real time.

- ✓ Centralised School Wise Reports
- ✓ Track Admission Counsellor Performance
- ✓ Drag and drop builder
- ✓ Finance Dashboard

## CRM application for group of schools:

The biggest challenges that a chain or a group of schools face is that there limited to no visibility of the potential and brand equality of each school. Each school operators in its own admissions. As a owner or part of the management team, it becomes very difficult to analyse trends and insights, understand which school is performing well and which needs a boost.

## One unified platform parents:

The CRM application for developing the management app for parent , school, student into three steps

Empower your parents to keep a track of their end-to-end journey with a highly configurable centralized dashboards. Improve student experience and increase retention at every step with a single view as dashboard to apply, track, communicate, and pay admission fee.

- ✓ One View Dashboard
- ✓ Real Time Application Status
- ✓ Query Management System
- ✓ Real time Dynamic Enquiry Allocation
- ✓ Real time reports & Analytics

## The CRM Application using schools:

- ✓ School admissions
- ✓ Developer Account for Schools
- ✓ School Management system
- ✓ Creation for the school, student, parent objects
- ✓ Creation for profile in schools
- ✓ Creating users in schools
- ✓ School Records
- ✓ Improve student Lifecycle
- ✓ Monitor Fee payments and Reminders



## ✓ Track and Gain Insight on Organization -wide Data and Process

Education CRM software are meant to automate and manage communication with students, employees, donors and everyone in the institution.

The main aim of these educational institutions to provide quality education and reach every student who is interested to pursue education.

### Increased Efficiency:

School CRM software automates many of the manual processes involved in student and parent communication, data management, and reporting. This can save schools time and resources, allowing them to focus on other important tasks. By having all relevant information in one place, staff can access student and parent data quickly and easily reducing the need for manual data entry and improving accuracy.

### Improved Data Insights:

The CRM for applied school with all data stored in one place, schools can gain valuable insights into student behaviour, preferences, and trends. This information can be used to make informed decisions about admission processes, student resource allocation. Schools can also use the data to monitor student progress and identify areas for improvement.

### Enhanced Reputation Management:

CRM for schools software help schools in managing their reputation by tracking student satisfaction and addressing concerns in a timely manner. By having all relevant information in one place. Schools can respond to student and parent inquiries more effectively and efficiently.

This can help school maintain a positive image and build stronger relationships within the community.

### Increased Admissions:

School CRM software can automate many of the tasks involved in student enrollment, allowing schools to reach more prospective students and increase admissions. By using the software to track student interactions and send targeted communications, schools can improve their chances of attracting new students.

### Better Alumni Management:

A CRM can help schools keep in touch with alumni and tap into their networks for fundraising and recruitment. Schools can use the Software to track alumni interactions, send targeted communications and organize events. This can help schools maintain strong relationship with their alumni and leverage their networks to support their mission.

- ✓ Improve student Admissions Lifecycle
- ✓ Track student Life-cycles within the school
- ✓ Keep Alumni Information safe and accessible
- ✓ Stay Connected with Teams
- ✓ Monitor Fee Payments and Reminders
- ✓ Track and Gain insight on Organization wide data and Processes
- ✓ Reduce Operational Costs

## 6 CONCLUSION

The project aim is to provide real-time knowledge for all the students 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.

One of the main issues in the management of educational institutions, including schools, is to increase the level of educational and methodological work of a particular schools. A digital educational platform would allow the effective use of available educational schools resources, and teachers would be allowed to use modern technologies in practice.

In this work, a software product was developed-a CRM system with application for a school. In the course of the work, the processes of modeling, building architecture, and implementation of web application functionally were described. This CRM system is implemented in the educational process of a school and undergoes initial testing. Further development and support of the developed software product are planned.

## **7 FUTURE SCOPE**

CRM is a form of software that helps teams and individuals communicative more effectively. A CRM used in higher education institutions to collect and organize data in a way that allows users to simplify admissions, target marketing efforts, and track results. CRM software can be used by colleges and universities to follow students from the admission process until graduation. CRM software can also be used by the administration to promote courses to enrolled students and provide information about student services, career fairs, and university events.

CRM can quickly organize student information and make searching across the software simple. It'll be easier to respond to students questions and handle other areas of the student-university connection of the result of this.

The CRM application school/colleges application, admission , personal details in store the data into the Customer Relation Management System.

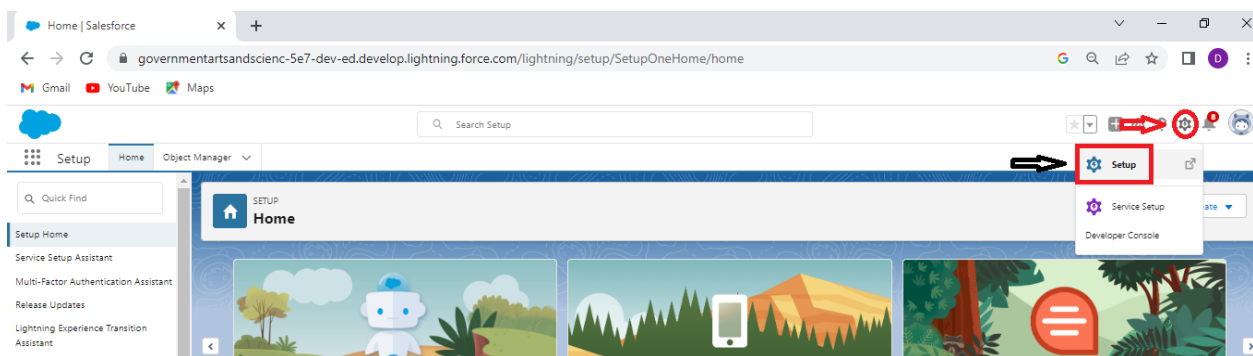
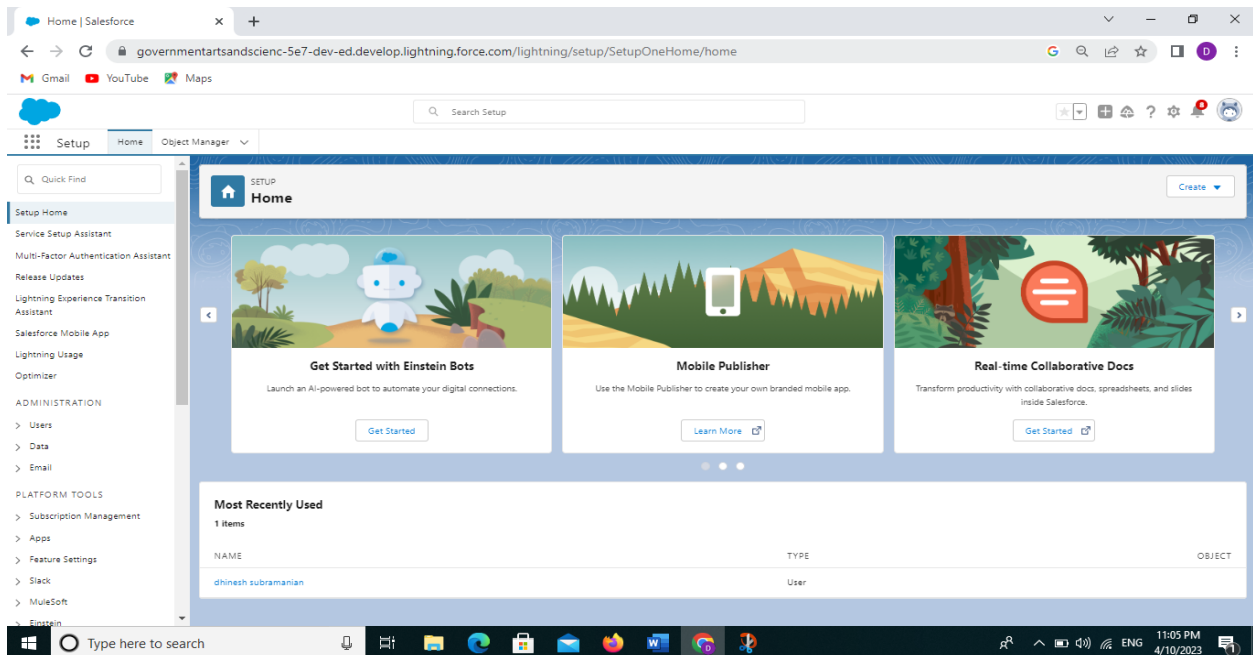
- Student information management:  
Including demographic information, enrollment history, academic records, and contact details.
- Enrollment tracking:  
Manage the enrollment process from lead generation, application, acceptance, and enrollment.
- Academic progress tracking:  
Monitor student progress, including grades, attendance, 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.

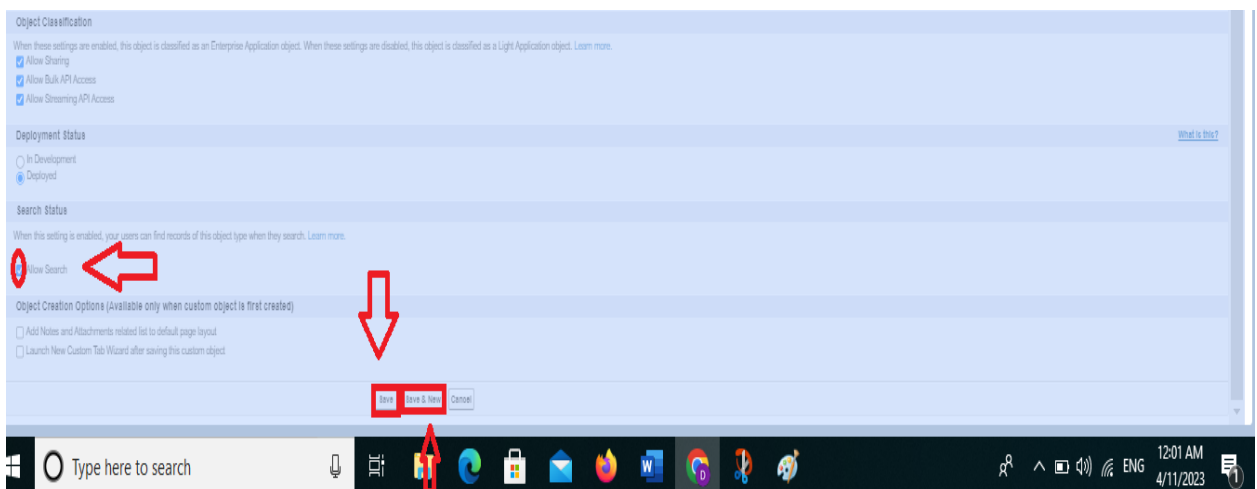
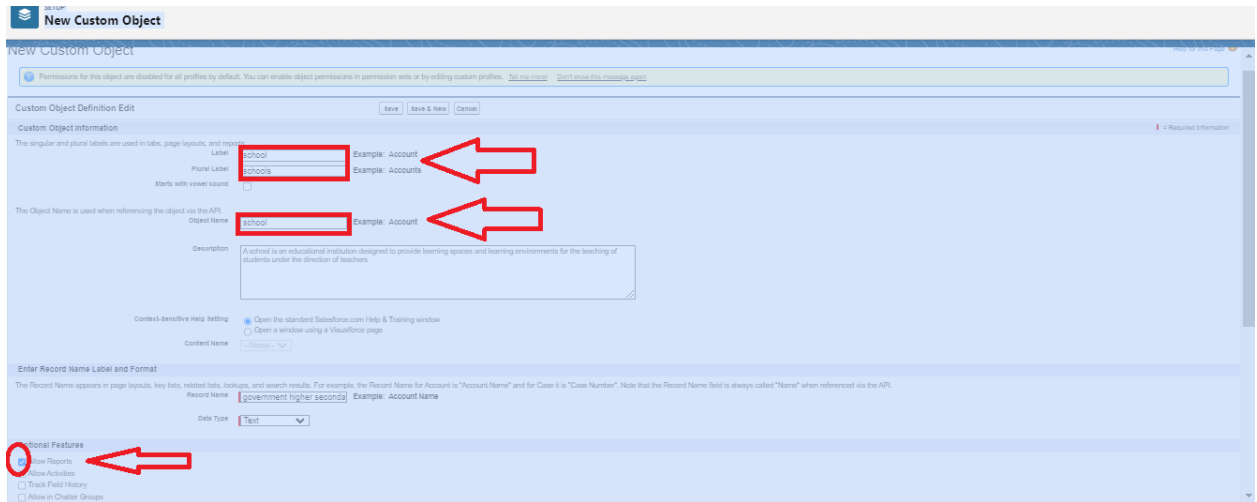
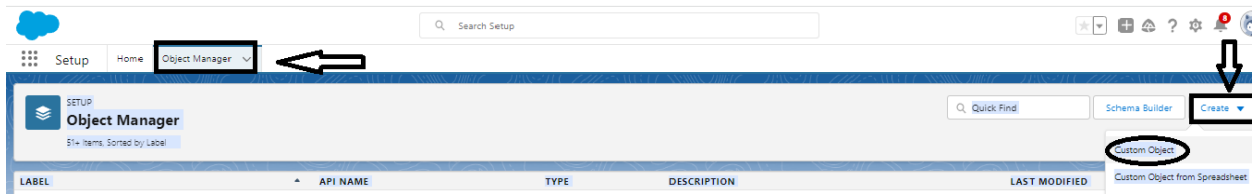
- Integrations with other educational systems:  
Connect with other software systems such as learning Management systems, Student Information Systems, and Finance and Accounting Systems.

All above features contain the CRM application utilize the future scope.

## 8 APPENDIX

### Source code





tabs | Salesforce

governmentartsandscienc-5e7-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

Custom Object Tabs [New](#) [What Is This?](#)

No Custom Object Tabs have been defined.

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined.

Visualforce Tabs [New](#) [What Is This?](#)

No Visualforce Tabs have been defined.

Lightning Component Tabs [New](#) [What Is This?](#)

No Lightning component tabs have been defined.

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Setup Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object](#).

Object: **School**

Tab Style: **Apple**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: **None**

Enter a short description.

Description:

[Next](#) [Cancel](#)

App Manager | Salesforce

governmentartsandscienc-5e7-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

app manager

Apps

App Manager

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

Lightning Experience App Manager

[New Lightning App](#) [New Connected App](#)

Clone Apps (Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐

21 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible in...
1	All Tabs	AllTabSet		10/04/2023, 2:52 pm	Classic	✓
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/04/2023, 2:52 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	10/04/2023, 2:52 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/04/2023, 2:54 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	10/04/2023, 2:52 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	10/04/2023, 2:52 pm	Classic	✓

App Manager | Salesforce

governmentartsandscienc-5e7-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

Lightning Experience App Manager

Clone App (beta)

Enable App Cloning Disabled

21 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified Date	App Type	Visible in...
1	All Tabs	AllTabSet		10/04/2023, 2:52 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/04/2023, 2:52 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	10/04/2023, 2:52 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	10/04/2023, 2:54 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	10/04/2023, 2:52 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	10/04/2023, 2:52 pm	Classic	✓

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

Type to filter list...

Accounts

Alert Settings

All Sites

Alternative Payment Methods

App Launcher

Appointment Invitations

Approval Requests

Asset Action Sources

Asset Actions

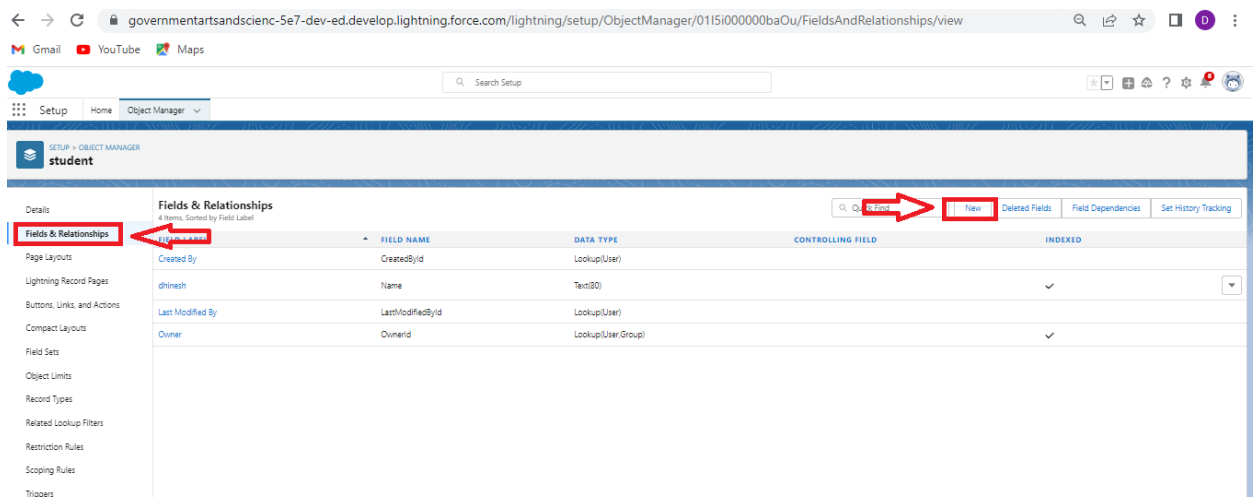
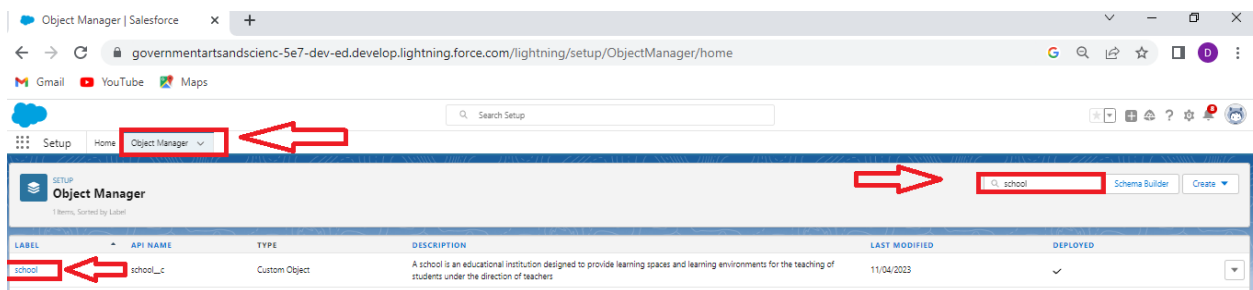
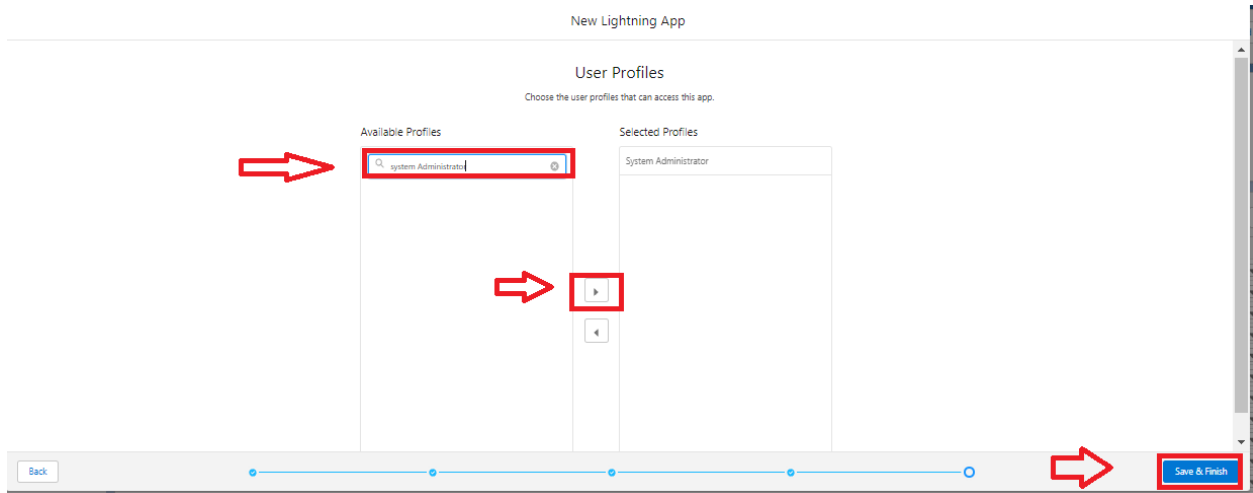
Selected Items

No items selected

Back

Next







Rename Tabs and Labels | Salesforce | student | Salesforce

governmentartsandscienc-5e7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i000000baOu/FieldsAndRelationships/new

Setup Home Object Manager

student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

student

New Custom Field

Step 3. Establish field-level security

Field Label: student  
Data Type: Text Area  
Field Name: student  
Description:

Select the profiles to which you want to grant access to this field on field-level security. This field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chatter Data Privacy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Finance.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Finance.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Guest Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Subscriptions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Recruit User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce AIH City System Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Share Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com City User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Setup Home Object Manager

student

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Scoping Rules

Triggers

Flow Triggers

student

New Custom Field

Step 4. Add to page layouts

Field Label: student  
Data Type: Text Area  
Field Name: student  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field Page Layout Name

☒ student Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous **Save & New** Save Cancel

Profiles | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

profiles

Users Profiles

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

### Profiles

All Profiles Edit Delete Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Clone	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Clone Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Clone Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Clone Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Clone Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Clone System Administrator	Salesforce	<input type="checkbox"/>

1-6 of 6 0 Selected

Profiles | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%3Fid%3...

Setup Home Object Manager

profiles

Users Profiles

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

### Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text"/>

Save Cancel



Users | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers?pageaddress=%2F005%2F%3FretURL%3D%252F005%253F%3FUserEntityOverride%2...

Search Setup

Setup Home Object Manager

users

Users

New User

User Edit

General Information

First Name Last Name Alias Email Username Nickname Title Company Department Division

Save Save & New Cancel

Role: <None Specified>

User License: XOrg Proxy User

Profile: Cross Org Data Proxy User

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

HDC User: ☐

Data.com User Type: --None--

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only): ☐

High-Contrast Palette on Charts: ☐

Permission Sets | Salesforce

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

Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

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

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del   Clone	Billoquist, Bill		
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories. ...	000 Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	000 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 Seat
<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"/> Del   Clone	Commerce Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subscriptions, que...	Facility Manager
<input type="checkbox"/> Clone	Field Service Mobile Standard Permission Set	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 Seat
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User

1-25 of 26 0 Selected

Page 1 of 2

Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fuddf%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

permission sets

Users

Permission Sets

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

### Permission Sets

Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

Save Cancel

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

License

Session Activation Required ☐

Last Modified By [Mehdi Nadeem](#) 23/01/2023, 2:28 pm

API Name [teacher\\_permission](#)

Namespace Prefix

Created By [Mehdi Nadeem](#) 23/01/2023, 2:28 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

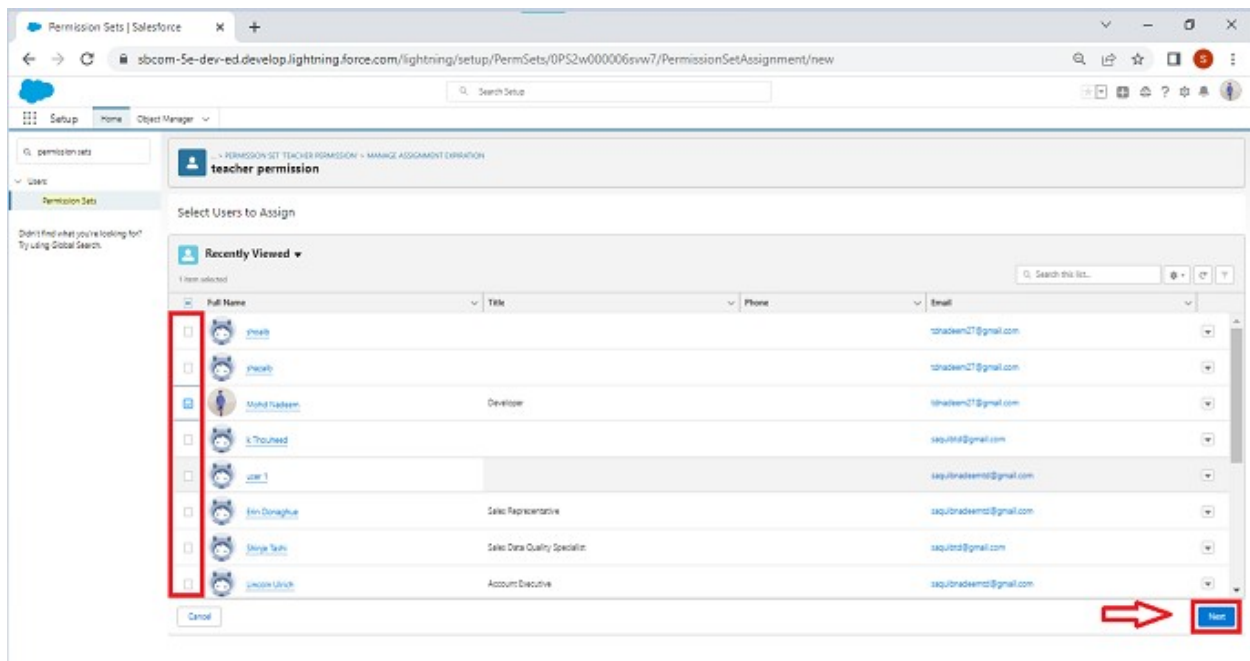
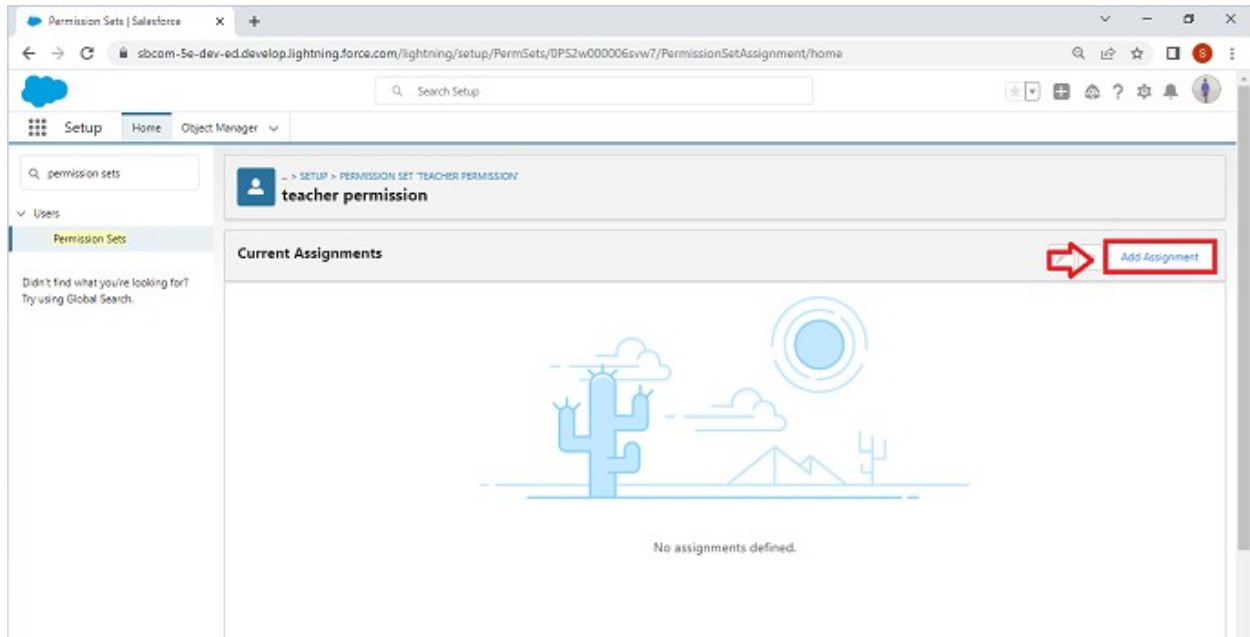
**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

**External Data Source Access**





Reports | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui

Event Management | Reports | Dashboards

Recent Reports

Search recent reports...

New Report

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Suppliers Report		RMS reports	Mohd Nadeem	23/1/2023 8:42 am	
Created by Me	Order details with bill no and order via		RMS reports	Mohd Nadeem	23/1/2023 8:40 am	
Private Reports	New Products with Category ID Report		RMS reports	Mohd Nadeem	23/1/2023 8:36 am	
Public Reports	Sales Rep Win Rates	How well are my sales reps doing?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:55 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 screen?	Public Reports	Automated Process	4/12/2022 10:12 am	
FOLDERS	Accounts by Market		Residential Reports	Mohd Nadeem	30/12/2022 4:19 pm	
All Folders	Open Support Cases		Residential Reports	Mohd Nadeem	2/1/2023 2:28 pm	
Created by Me	Rated Accounts by State		Residential Reports	Mohd Nadeem	2/1/2023 2:01 pm	
Shared with Me	High Value Residential		Residential Reports	Mohd Nadeem	30/12/2022 4:23 pm	
FAVORITES	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern areas?	Marketing Reports	Mohd Nadeem	30/12/2022 11:16 am	
All Favorites	Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Nadeem	30/12/2022 11:24 am	
	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:01 am	
	Pipeline Health Report Current FQ	How big are the deals at each stage in the pipeline this FQ?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:40 am	
	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:34 am	
	Viral reservation list report	created just for the demo purpose. It doesn't include any conditions, and requirement	Private Reports	Mohd Nadeem	23/12/2022 5:52 pm	

## Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with SolarBots	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard
Opportunities with Contact Roles	Standard
Opportunities with Partners	Standard
Opportunities with Competitors	Standard
Opportunity History	Standard
Opportunity Field History	Standard
Opportunity Trends	Standard

Details

Accounts

Standard Report Type

Start Report

Details

Fields (71)

Created By You

- Accounts by Market  
Last Used 1/3/2023
- Rated Accounts by State  
Last Used 1/2/2023
- High Value Residential  
Last Used 1/2/2023

Created By Others

No Reports Yet

Objects Used in Report Type

- Role
- Account
- Operating Hours
- Asset

Report Builder | Salesforce

sbcom-5e-der-ed.develop.lightning.force.com/one/one.app#eyJjb21wb251bnREZWY0UyZX8vcnRzOnJlcG9ydEJ1aWwKZXllClh0HRYaW1dGVzlp7lnJlY29yZElkjoili...

Event Management Swits Attendee Speakers Vendor Reports Dashboards

REPORT: New Accounts Report / Accounts

Get Feedback? Add Chart Run & Run Close

Previewing a limited number of records. Run the report to see everything.

Fields:

- Groups
  - GROUP NAME
  - Add group...
- Columns
  - Add column...
  - Last Activity
  - Account Owner
  - Account Name
  - Billing State/Province
  - Type
  - Rating
  - Last Modified Date

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1		Mohd Nadeem	United Oil & Gas, Singapore		Customer - Direct	Medium	18/01/2023
2		Mohd Nadeem	United Oil & Gas, US		Customer - Direct	Medium	18/01/2023
3		Mohd Nadeem	University of Arizona		Customer - Direct	Warm	18/01/2023
4		Mohd Nadeem	Whitney Kelle Household		Residential	Hot	18/01/2023
5		Mohd Nadeem	Whitney Kelle Household		Residential	Hot	18/01/2023
6		Mohd Nadeem	Ismael Jansari		Customer - Direct	Warm	18/01/2023
7		Mohd Nadeem	guru vrindhava		Insurance Partner	Cold	18/01/2023
8		Mohd Nadeem	Pat Heath Household		Residential	Cold	18/01/2023

Update Preview Automatically

