

PROJECT REPORT

A CRM APPLICATION FOR SCHOOLS OR COLLEGES

1. INTRODUCTION

1.1 OVERVIEW

- Our project is about how we have to help to maintain and manage the school or college related problems. A CRM Application for schools or colleges management software is a specialized tool designed to manage and track student interactions, data and automate tasks related to student recruitment, enrollment and retention.
- This technology helps the schools or colleges management to manage their relationships with students and parents and it can be a powerful tool for increasing the admission also.
- A CRM Application is designed to streamline the administrative and academic processes and integrate them into a centralized system.
- It provides a 360-degree view of each and every student academic details.
- It provides the interaction facility for the students,

PROJECT REPORT

parents, faculty and staff in a single platform and making the interaction so easy and then build a strong community.

- This application is very helpful in this competitive world to get profit and success.

1.2 PURPOSE

- A CRM application can help educational organizations effectively manage and track leads, resulting in improved numbers.
- It can help by personalizing communications and providing automated follow-up, educational organization can build better relationships with students and leads and keep them engaged over time.
- A CRM system can improve the communications between different departments within an organization and help to increases efficiency and productivity.
- It is an essential tool for educational organization to improve enrollments, lead management, communication and student engagement.

PROJECT REPORT

- The application automates many of the manual process and reducing the amount of paperwork and ensuring the data.
- The application is to manage the workload efficiently and optimize their resources.

2.PROBLEM DEFINITION AND DESIGN THINKING

2.1 Empathy Map



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



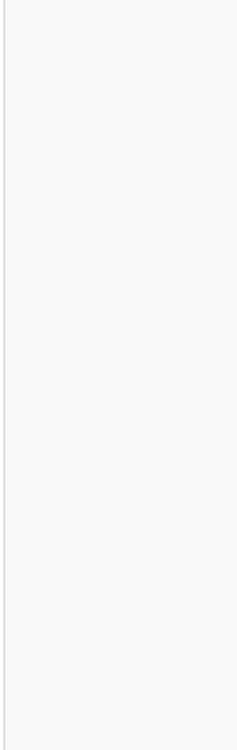
Says
What have we heard them say?
What can we imagine them saying?

Does
What behavior have we observed?
What can we imagine them doing?

Thinks
What are their values, needs, hopes, ambitions? What might be thoughts might affect their decisions?

Feels
What are their fears, frustrations, and anxieties? What other feelings might I have in their situation?

Below there is a zoom and a print icon to empathize with your persona



Need some inspiration
See a finished version of this template on [Behance](#) or [Dribbble](#).
[Open example →](#)



PROJECT REPORT

2.2 IDEATION AND BRAINSTORMING MAP



PROJECT REPORT

3 RESULTS

3.1 DATA MODEL

Object name	Fields in the Object																	
SCHOOL OBJECT	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Address</td><td>Text area</td></tr> <tr> <td>District</td><td>Text area</td></tr> <tr> <td>State</td><td>Text area</td></tr> <tr> <td>School websites</td><td>Text area</td></tr> <tr> <td>Phone number</td><td>Phone</td></tr> <tr> <td>Number of students</td><td>Roll-up summary</td></tr> <tr> <td>Highest marks</td><td>Roll-up summary</td></tr> </tbody> </table>		Field label	Data type	Address	Text area	District	Text area	State	Text area	School websites	Text area	Phone number	Phone	Number of students	Roll-up summary	Highest marks	Roll-up summary
Field label	Data type																	
Address	Text area																	
District	Text area																	
State	Text area																	
School websites	Text area																	
Phone number	Phone																	
Number of students	Roll-up summary																	
Highest marks	Roll-up summary																	
STUDENT OBJECT	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Phone number</td><td>Phone</td></tr> <tr> <td>School</td><td>Master-Detail Relationship</td></tr> <tr> <td>Results</td><td>Picklist</td></tr> <tr> <td>Class</td><td>Number</td></tr> <tr> <td>Marks</td><td>Number</td></tr> </tbody> </table>	Field label	Data type	Phone number	Phone	School	Master-Detail Relationship	Results	Picklist	Class	Number	Marks	Number					
Field label	Data type																	
Phone number	Phone																	
School	Master-Detail Relationship																	
Results	Picklist																	
Class	Number																	
Marks	Number																	
Object name	Fields in the object																	

PROJECT REPORT

PARENT OBJECT		
	Field label	Data type
	Parent address	Text area
	Parent Number	Phone

3.2 ACTIVITY AND SCREENSHOT

Milestone-1:

Activity: Creating Developer Account

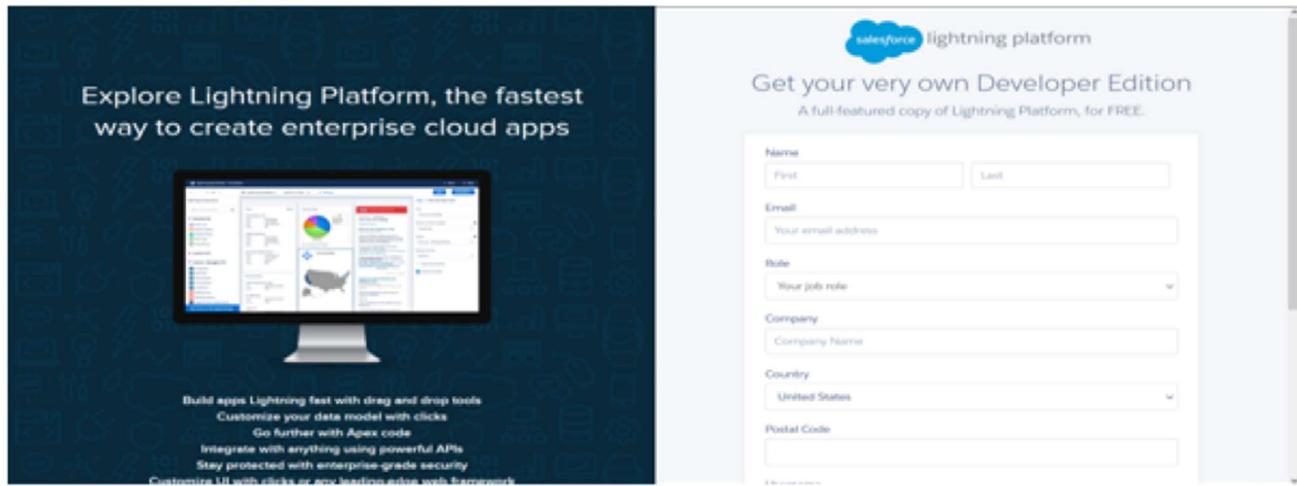
Creating Developer Account

Creating a developer org in salesforce

1. Go to [developers.salesforce.com/](https://developer.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

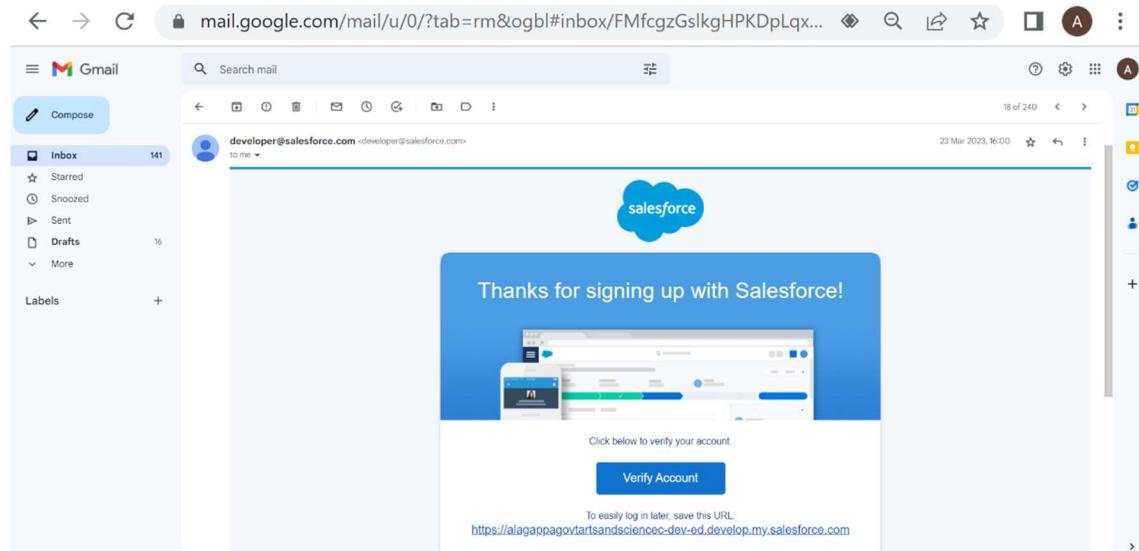
Click on sign up after filling these

PROJECT REPORT



Account Activation

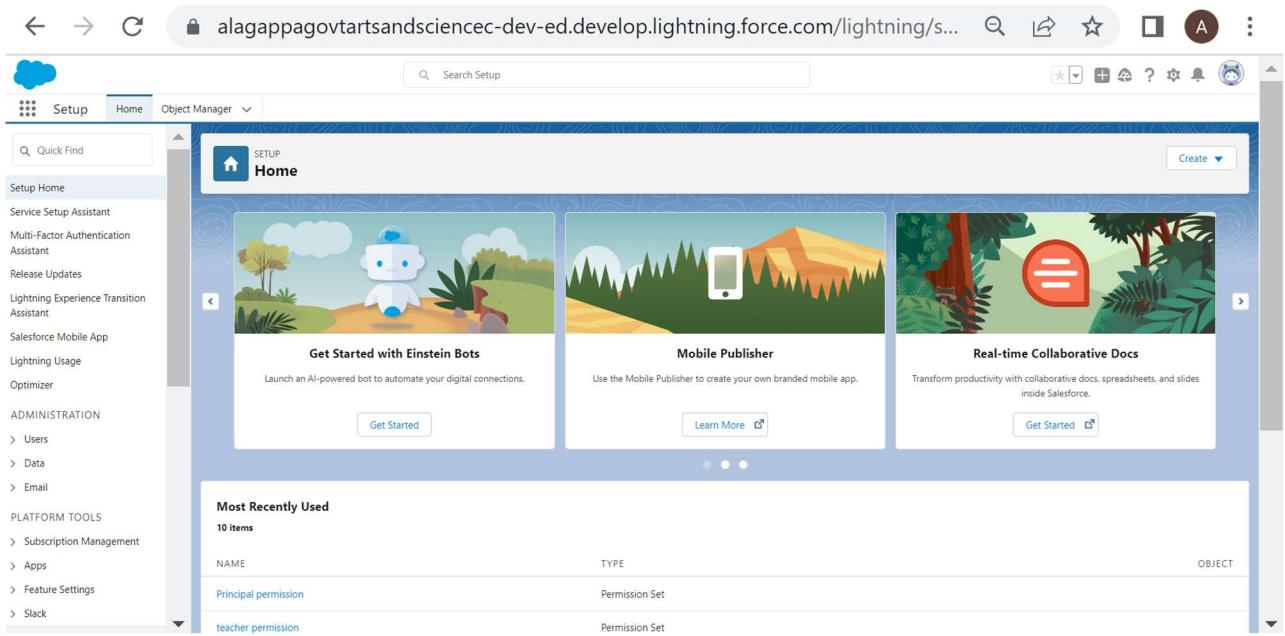
Go to the Gmail inbox and click developers.salesforce.com/ that you used while sign up. Click on the verify account to activate your account.



Login To Your Salesforce Account

1. Go to developers.salesforce.com/ and click on login.
2. Enter your username and password that you had already created.
3. After login this homepage will appear.

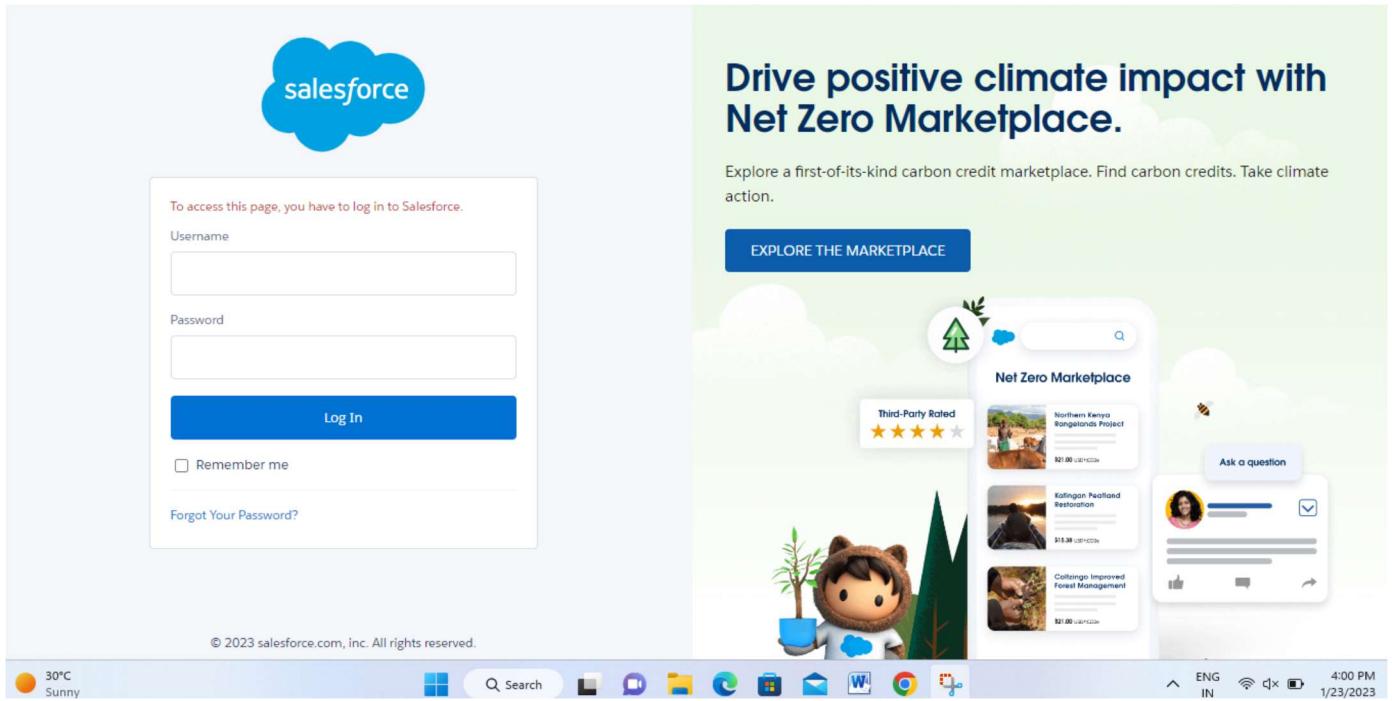
PROJECT REPORT



The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, Administration (Users, Data, Email), Platform Tools (Subscription Management, Apps, Feature Settings, Slack), and Most Recently Used (10 items). The main content area features three cards: "Get Started with Einstein Bots" (Launch an AI-powered bot to automate your digital connections), "Mobile Publisher" (Use the Mobile Publisher to create your own branded mobile app.), and "Real-time Collaborative Docs" (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.). Each card has a "Get Started" button.

Salesforce login

<https://login.salesforce.com>



The screenshot shows the Salesforce login page on the left and the Net Zero Marketplace landing page on the right. The login page has fields for Username and Password, a Log In button, a Remember me checkbox, and a Forgot Your Password? link. The Net Zero Marketplace page features a large tree icon and the text "Drive positive climate impact with Net Zero Marketplace." It encourages users to explore the marketplace, which is described as a first-of-its-kind carbon credit marketplace where users can find carbon credits and take climate action. A "EXPLORE THE MARKETPLACE" button is prominently displayed. Below the button, there's a section for "Third-Party Rated" projects, showing the Northern Kenya Mangroves Project (3 stars) and the Kalingan Peatland Restoration (4 stars). There's also a "Ask a question" section with a profile picture and a "Collaborate" section with a person icon. At the bottom, there's a footer with the text "© 2023 salesforce.com, inc. All rights reserved." and a status bar with weather information (30°C Sunny), search, file, and system icons.

PROJECT REPORT

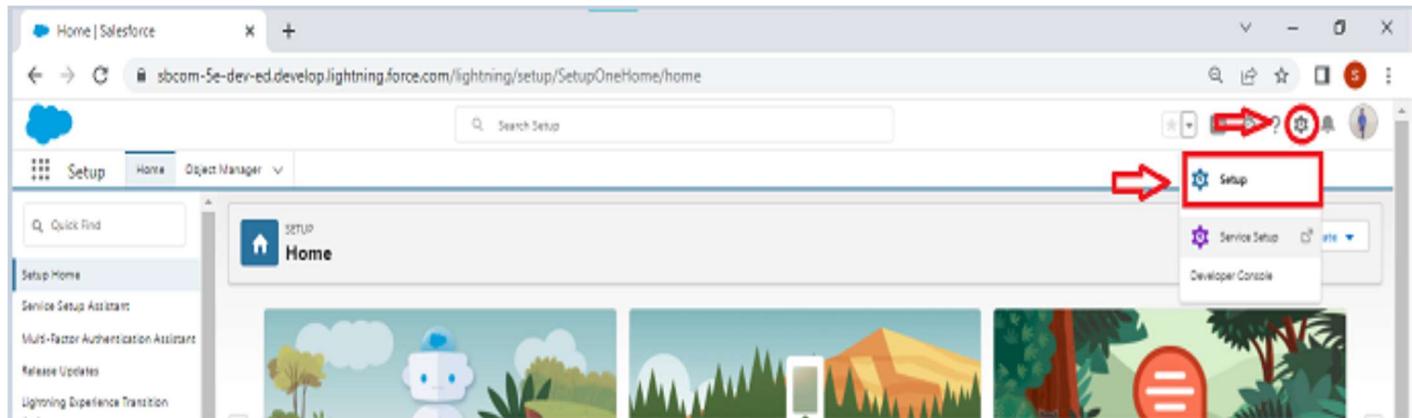
Milestone -2: Object

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 have to create the three 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, have a look on the extreme right you will find the **create** 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

PROJECT REPORT

**Check the Allow Reports checkbox
Check the Allow Search checkbox
Click Save.**



Search Setup

Setup Home Object Manager ▾

Object Manager

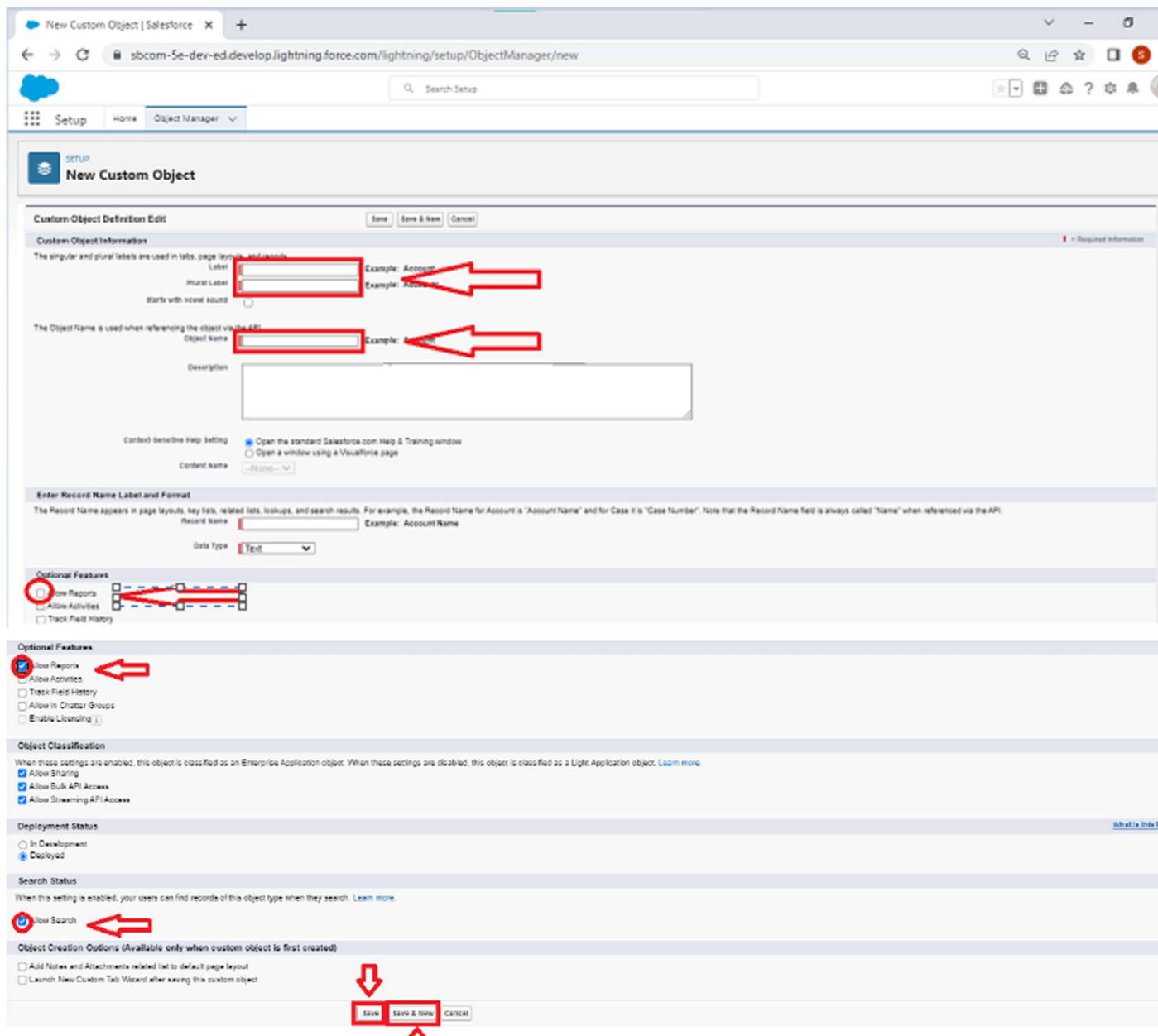
51+ Items, Sorted by Label

Quick Find Schema Builder Create ▾

Custom Object

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
			Custom Object from Spreadsheet	

After clicking you have this



New Custom Object | Salesforce

Custom Object Definition Edit

Custom Object Information

Label: Account (Example: Account)

Object Name: Account (Example: Account)

Context-sensitive Help setting: Open the standard Salesforce.com Help & Training window

Optional Features

Allow Reports (highlighted with a red circle and arrow)

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

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 (highlighted with a red circle and arrow)

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

Add Notes and Attachments related list to default page layout

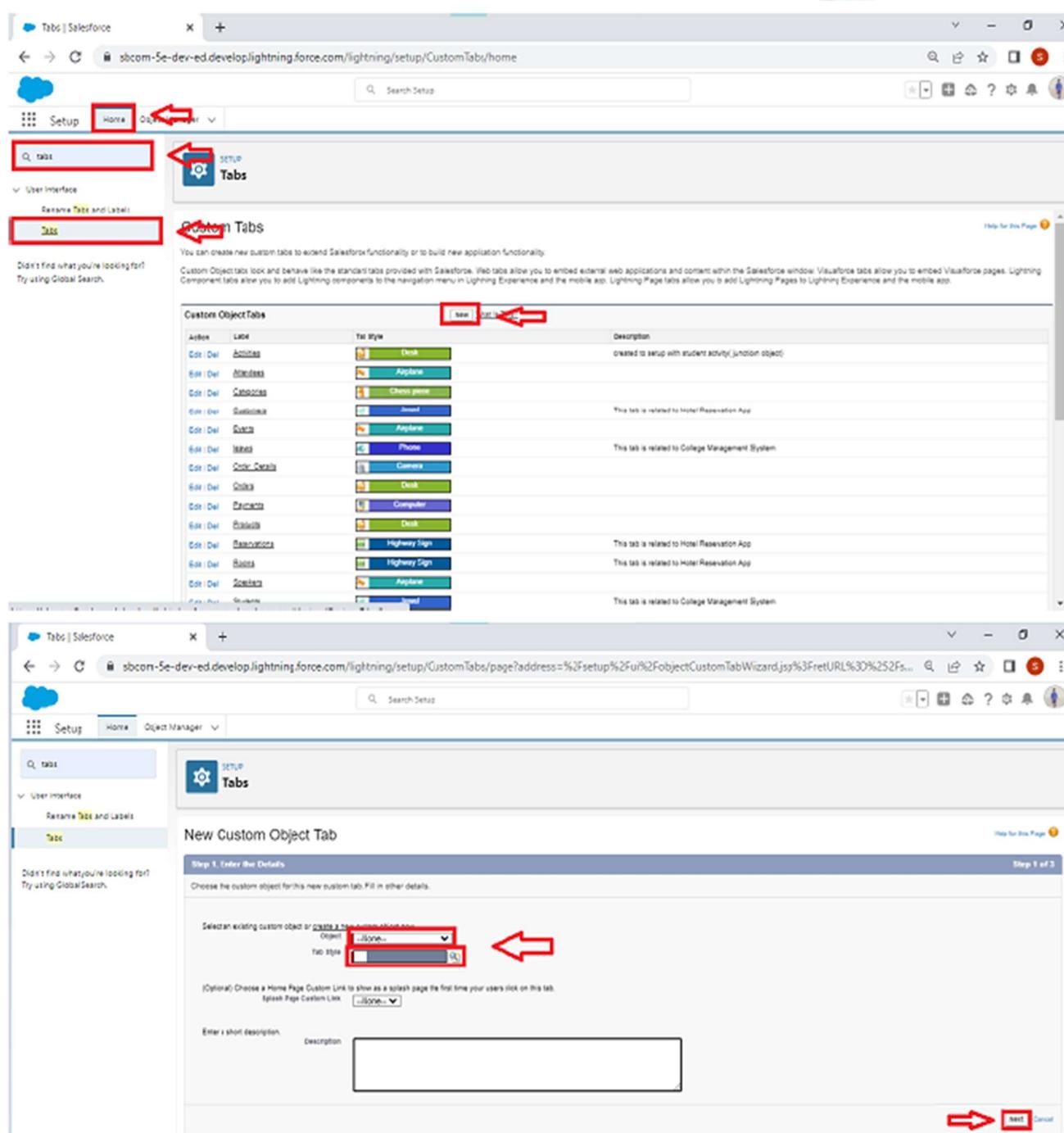
Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

PROJECT REPORT

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.



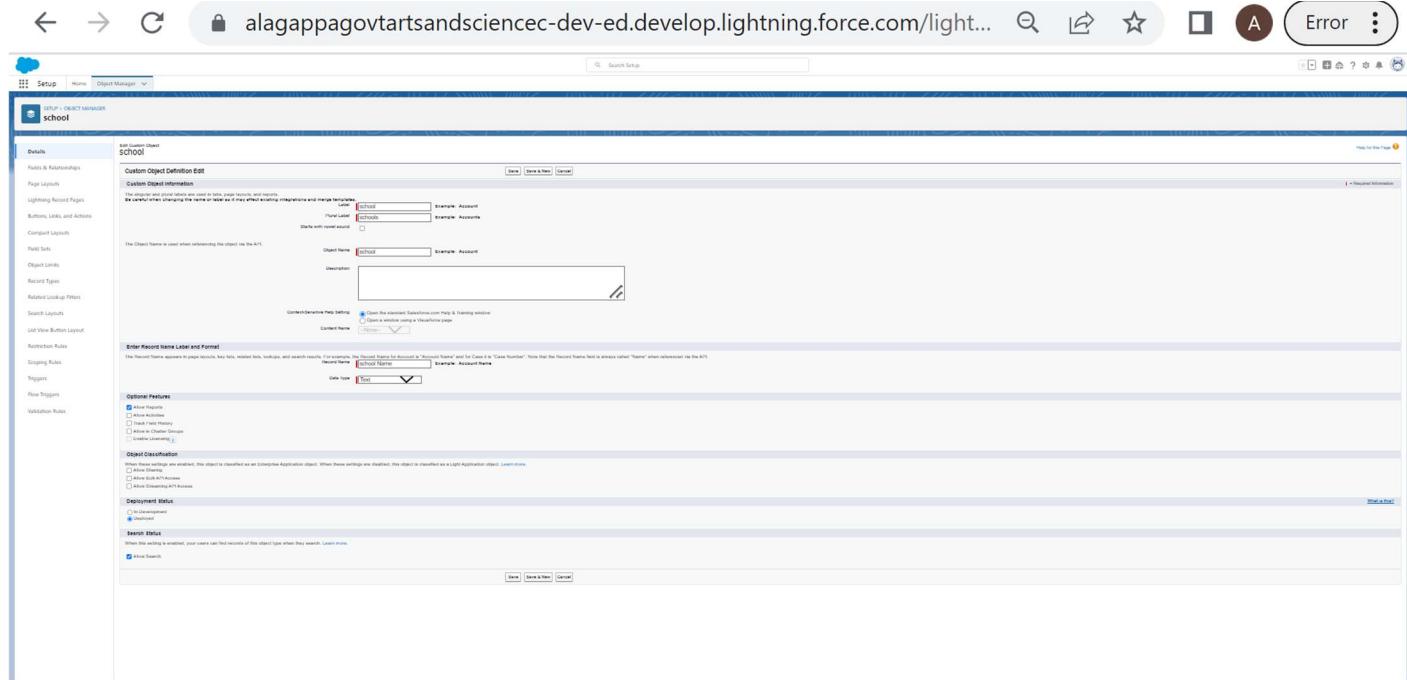
The screenshot shows two screenshots of the Salesforce Setup interface, illustrating the process of creating a new Custom Object Tab.

Top Screenshot: The user is navigating through the Setup menu. They have selected the 'Home' tab from the top navigation bar. In the search bar, they have typed 'Tabs'. Under the 'Custom Tabs' section, they have selected 'School'. On the right, there is a table titled 'Custom Object Tabs' listing various tabs. A red box highlights the 'New' button at the top right of this table, and a red arrow points to it. Another red box highlights the 'Tab Style' column, and a red arrow points to the 'Appliance' icon for the 'School' tab.

Bottom Screenshot: The user is on the 'New Custom Object Tab' page. At the top, it says 'Step 1. Enter the Details'. It asks to choose the custom object for the new tab. A dropdown menu is open, showing 'Object' and 'School...', with 'School...' highlighted. A red box highlights this dropdown, and a red arrow points to it. Below this, there is a 'Tab style' section with a dropdown menu containing icons. A red box highlights this dropdown, and a red arrow points to it. At the bottom right of the page, there are 'Next Step' and 'Cancel' buttons, both highlighted with red boxes and arrows pointing to them.

PROJECT REPORT

After filling this page you have got the below picture, the school object



click save and the school object is created.

In the same way you can create the student and parent object.

Activity 2: Create student object

- 1.Click on the gear icon and then select setup.
- 2.Click the object manager.
- 3.Click on the create that is on the extreme right and select custom object.

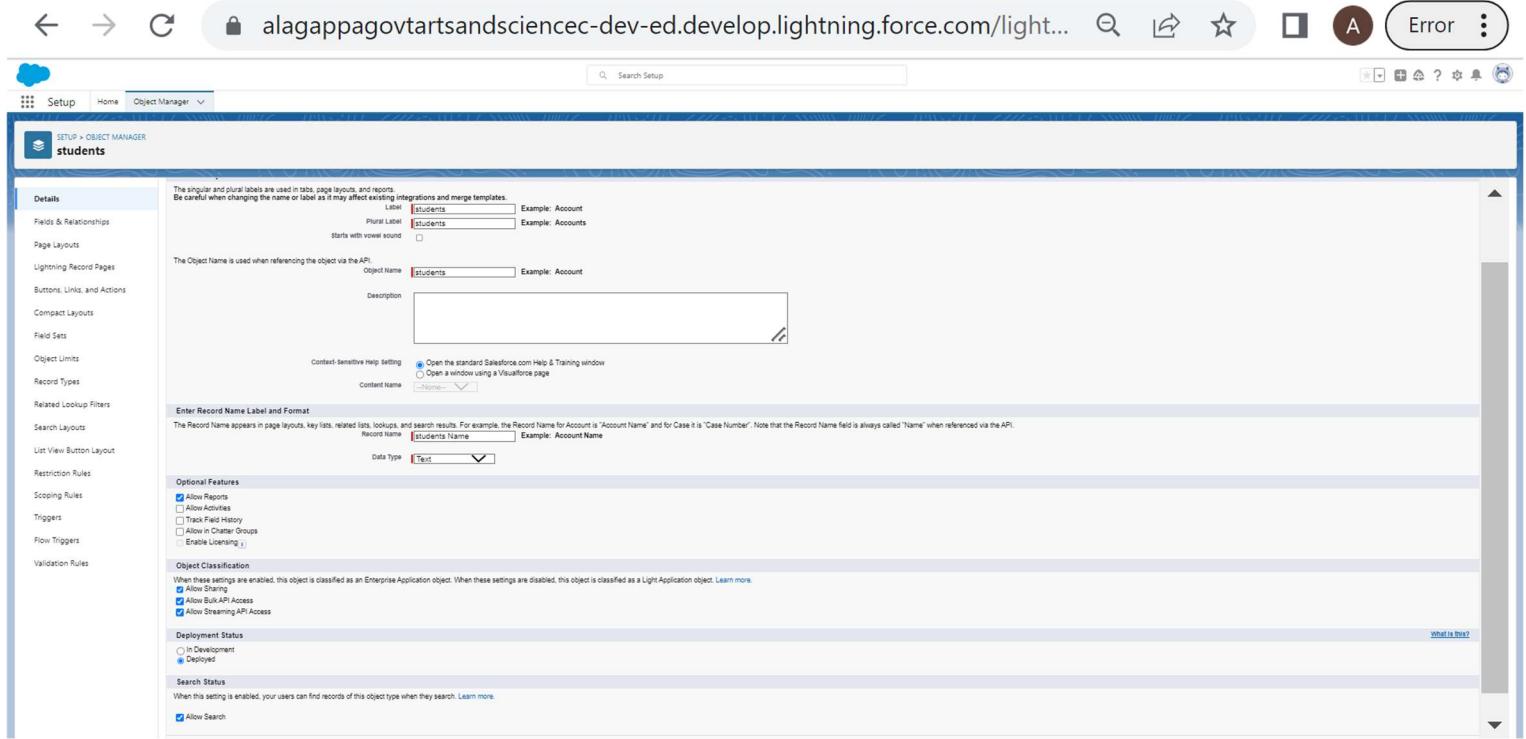
- On the Custom object Definition page, create the object as follows.
- Label: Students
- Plural Label: Students
- Record Name: Student Name
- Check the Allow Reports checkbox
- Check the Allow search checkbox
- Click save.

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.

PROJECT REPORT

After done the above procedure you have got the below picture, the student object click save and the student object is created.



Activity 3 : Create parent object

- 1.Click on the gear icon and then select setup.
- 2.Click the object manager.
- 3.Click on the create that is on the extreme right and select custom object.

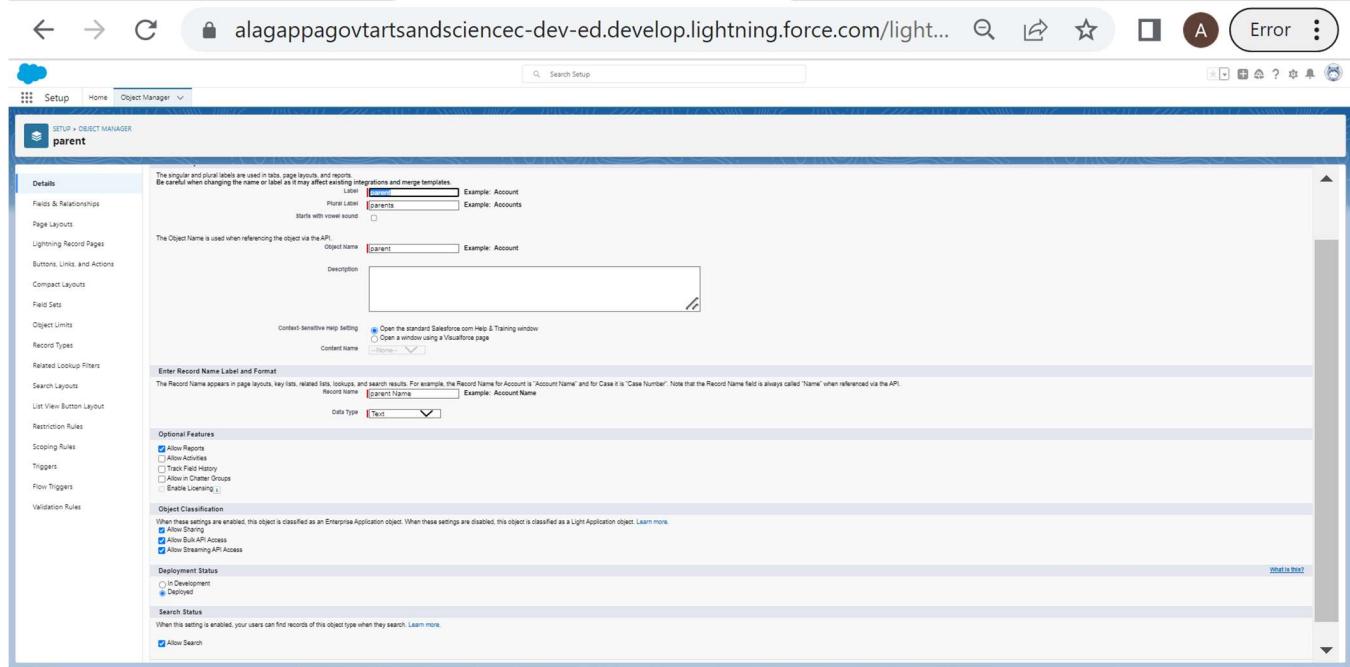
- On the Custom object Definition page, create the object as follows.
- Label: Parent
- Plural Label: Parents
- Record Name: Parent Name
- Check the Allow Reports checkbox
- Check the Allow search checkbox
- Click save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select tabs. Under custom object tabs, click New.

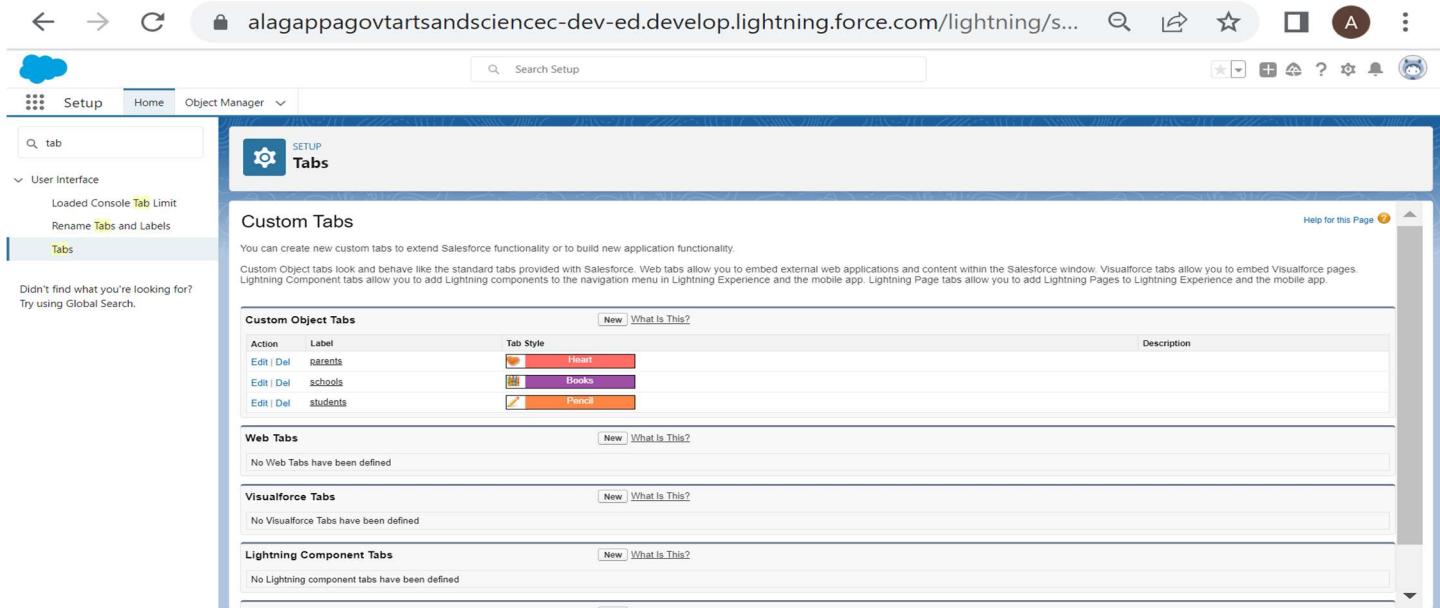
- 1.For Object, select Parents.
- 2.For Tab style, select any icon.
- 3.Leave all defaults as is. Click Next, Next and Save.

PROJECT REPORT

After done the above procedure you have got the below picture, the parent object click save and the parent object is created.



We create the tab as the procedure above , then after done that we got the below result for those three object i.e., school, student ,parent.



Milestone - 3: Lightning App

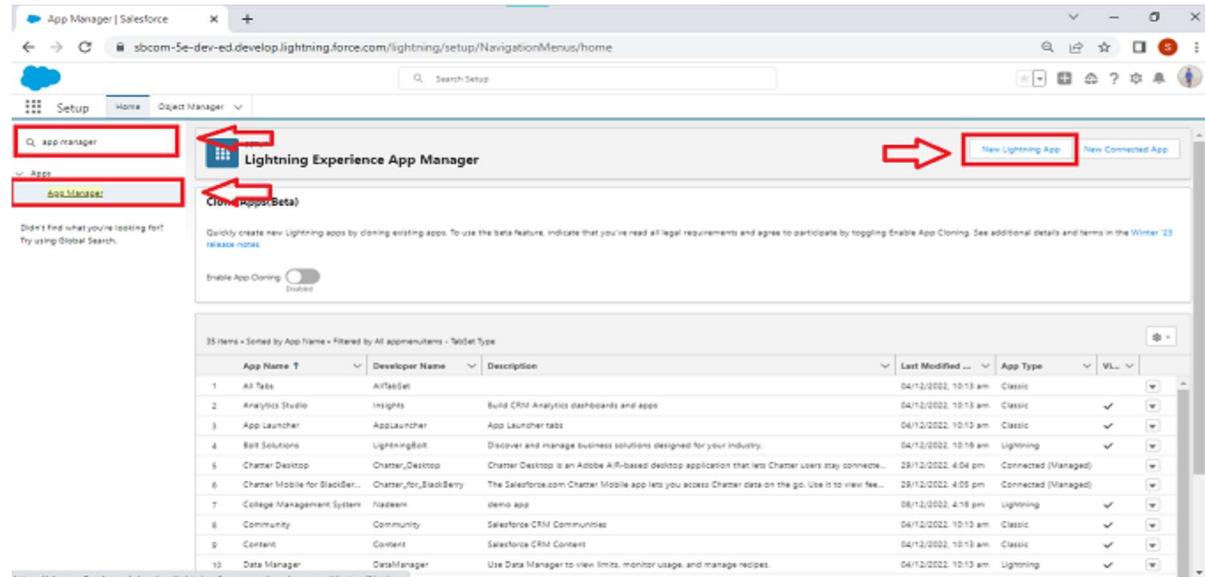
Apps in salesforce are a group of tabs that helps the application function by working together as a unit. It has a logo, a name and a particular set of tabs.The simplest app usually has just two tabs

PROJECT REPORT

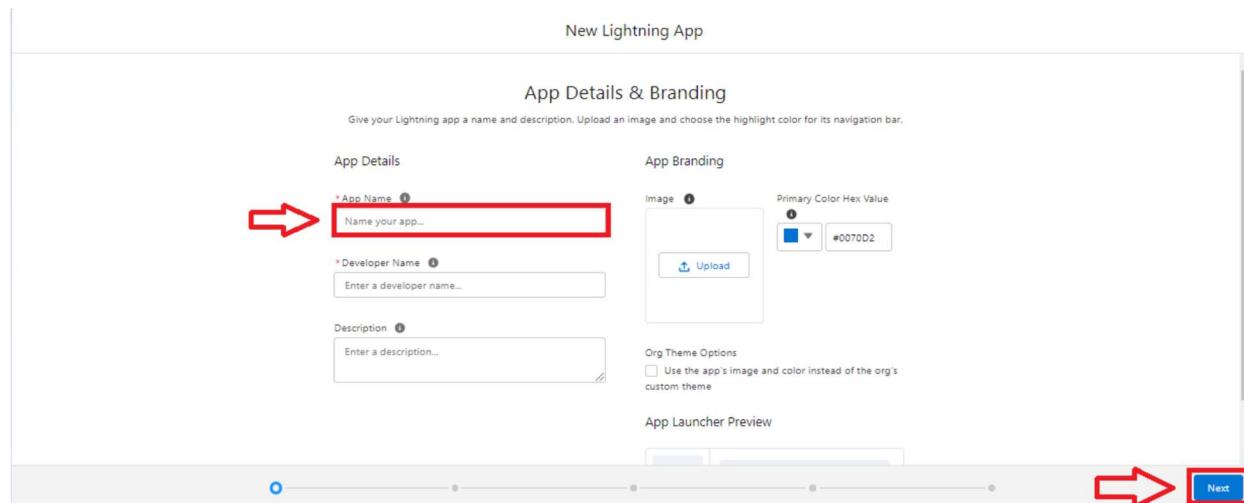
Activity:

Create the School Management App

- From the 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 defaults selection and click next.
- Under utility items, leave as is and click Next.
- From the available items, select schools, students. Parents, Reports and

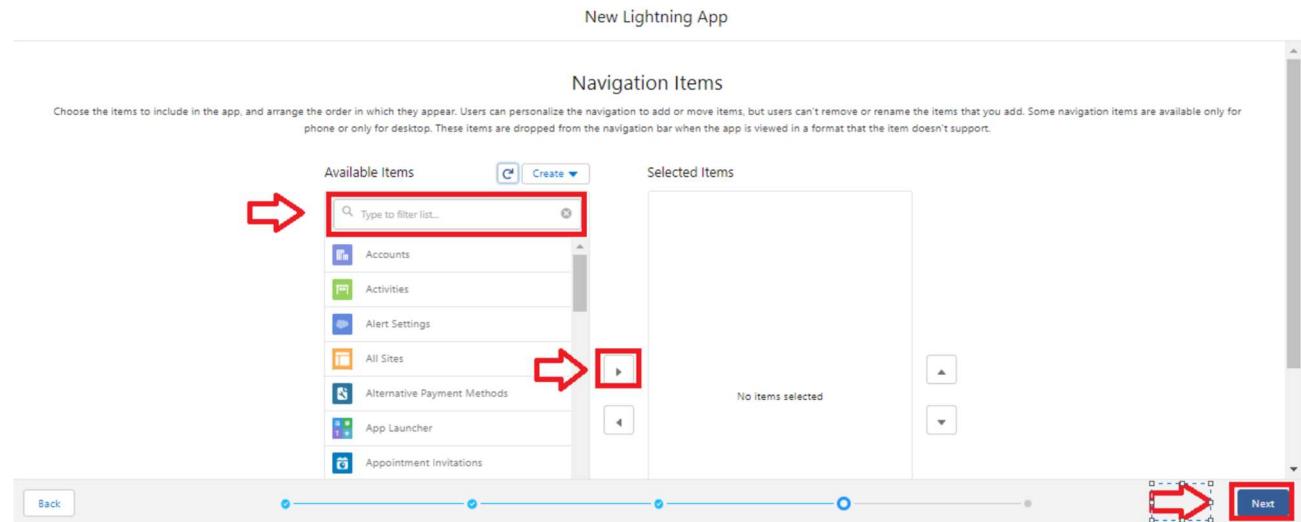
PROJECT REPORT

Dashboards and move them to Selected items and click Next.

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.



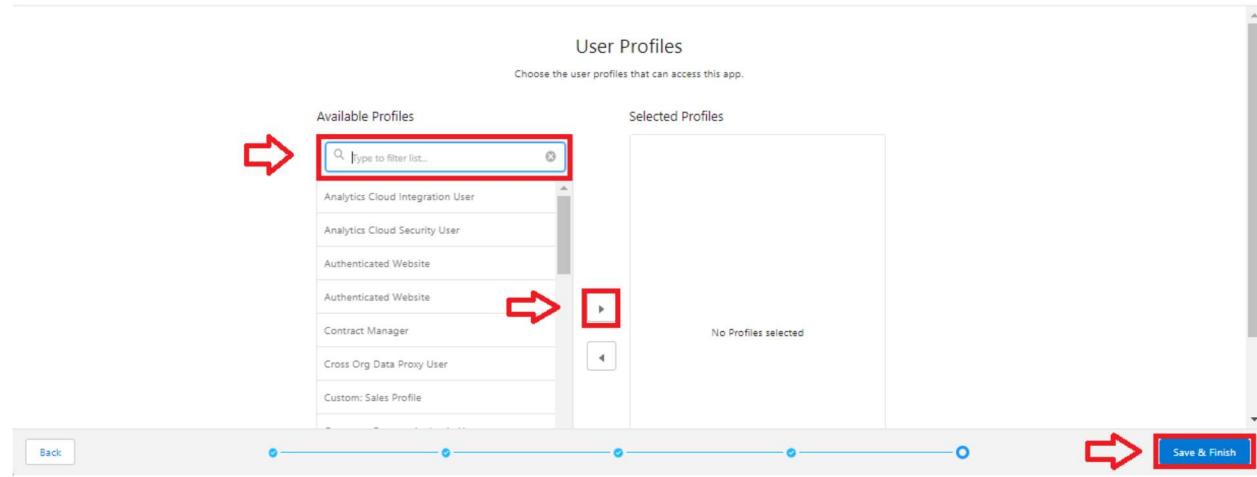
Available Items	Selected Items
Accounts	
Activities	
Alert Settings	
All Sites	
Alternative Payment Methods	
App Launcher	
Appointment Invitations	

Back Next

- From Available profiles, select System Administrator and move it to Selected profiles. click save and finish.

User Profiles

Choose the user profiles that can access this app.

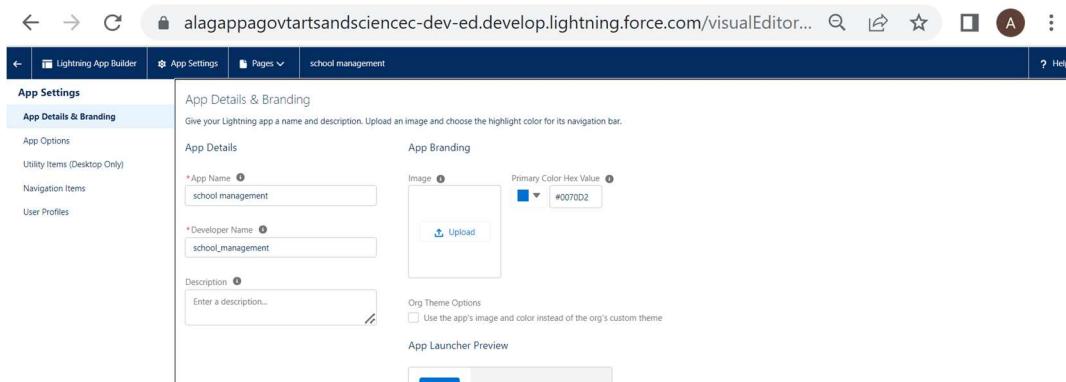


Available Profiles	Selected Profiles
Analytics Cloud Integration User	
Analytics Cloud Security User	
Authenticated Website	
Authenticated Website	
Contract Manager	
Cross Org Data Proxy User	
Custom: Sales Profile	

Back Save & Finish

- To verify the changes, click the App launcher, type School Management and select the School Management app. After done all the above procedure you got

And this is my School Management App.



Lightning App Builder

App Settings

App Details & Branding

App Details

* App Name: school management

* Developer Name: school_management

Description: Enter a description...

App Branding

Image: Upload

Primary Color Hex Value: #0070D2

Org Theme Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview

PROJECT REPORT

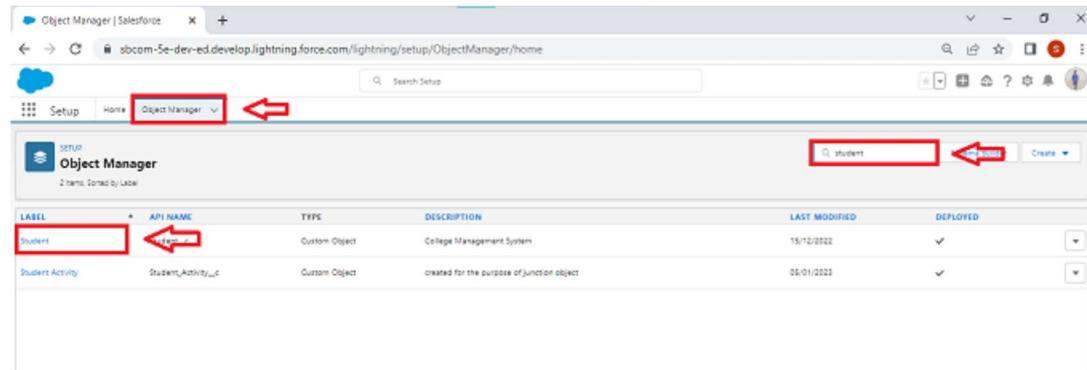
Milestone-4: Fields and relationships

An object relationship in salesforce is a two way association between two objects.

Relationship are created by creating custom relationship fields onan object. This is due so that when users view records,they can also see and access related data.

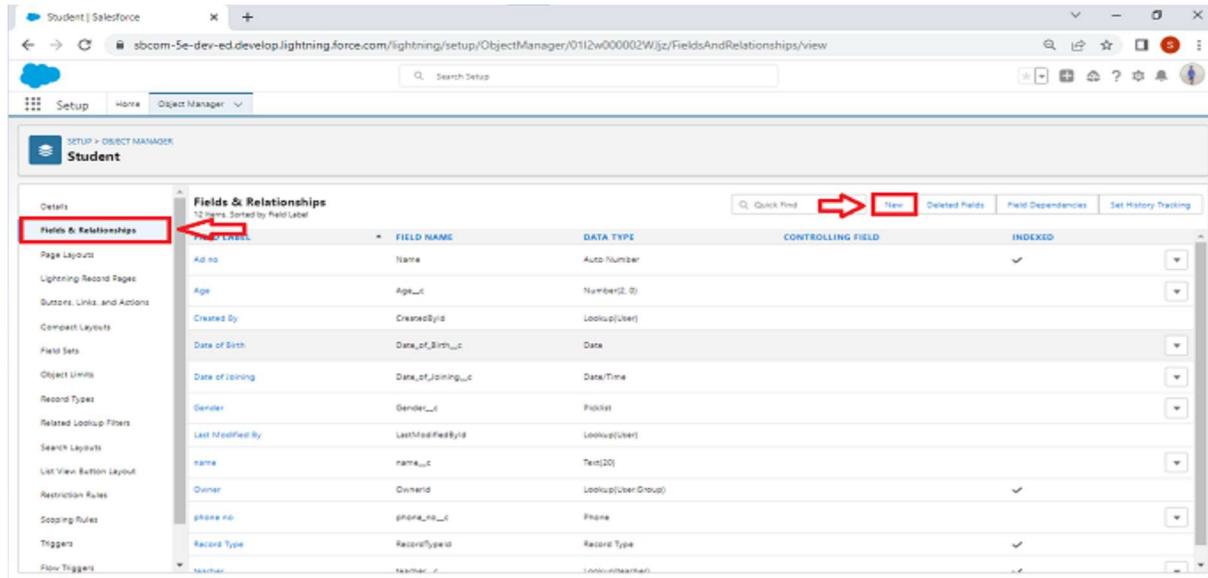
Activity-1: Creation of fields for the school object

1. Click the gear icon and select setup.
2. Click the object manager next to home tab.



3. Select School.
4. Select the fields and relationship from the left navigation and click New.

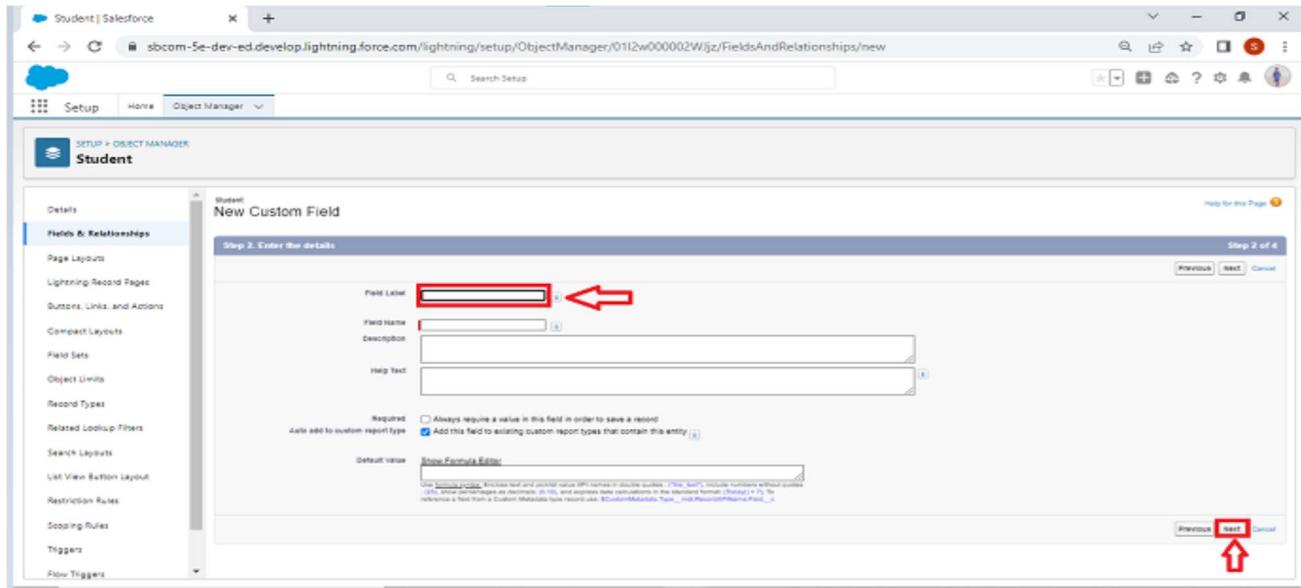
PROJECT REPORT



The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The 'Fields & Relationships' tab is selected in the sidebar. At the top right, there is a 'New' button highlighted with a red box. The main area displays a table of existing fields, including 'Adm_no', 'Age', 'Created By', 'Data of Birth', 'Date of Joining', 'Gender', 'Last Modified By', 'Name', 'Owner', 'Phone no.', 'Record Type', and 'Teacher'. Each field has a 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED' status.

Now we have to make a custom fields.

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.



The screenshot shows the 'New Custom Field' creation page for the 'Student' object. The 'Field Label' input field is highlighted with a red box. The 'Field Name' field contains 'Address'. The 'Description' and 'Help Text' fields are empty. Under 'Required', the 'Always require a value in this field in order to save a record' checkbox is unchecked. Under 'Able to add to custom report type', the 'Add this field to existing custom report types that contain this entity' checkbox is checked. The 'Default value' field is empty. At the bottom right, there are 'Previous', 'Next Step', and 'Cancel' buttons, with 'Next Step' highlighted with a red box.

Now let's create the other fields.

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.

PROJECT REPORT

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.

Let 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.

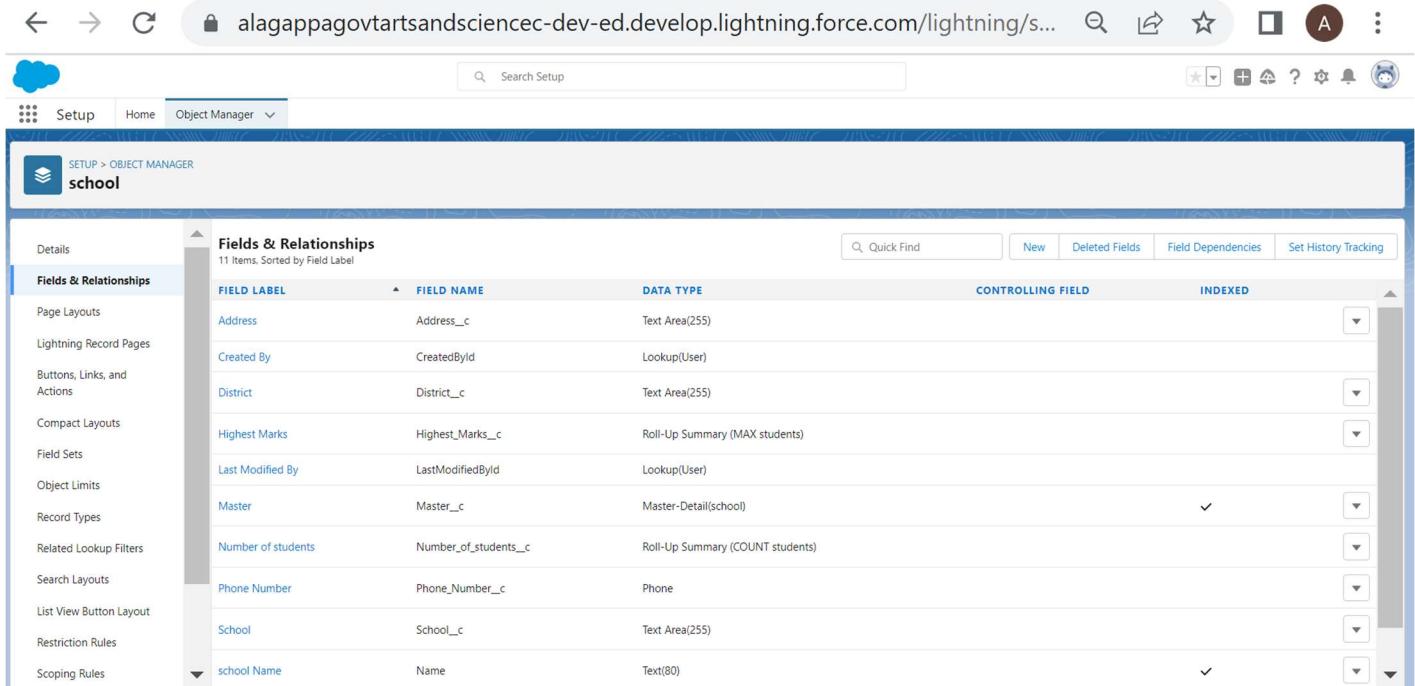
PROJECT REPORT

6. Click Next, Next, then Save & New

After done the above procedure you got the below results

Activity-1

Creation of fields for the school object

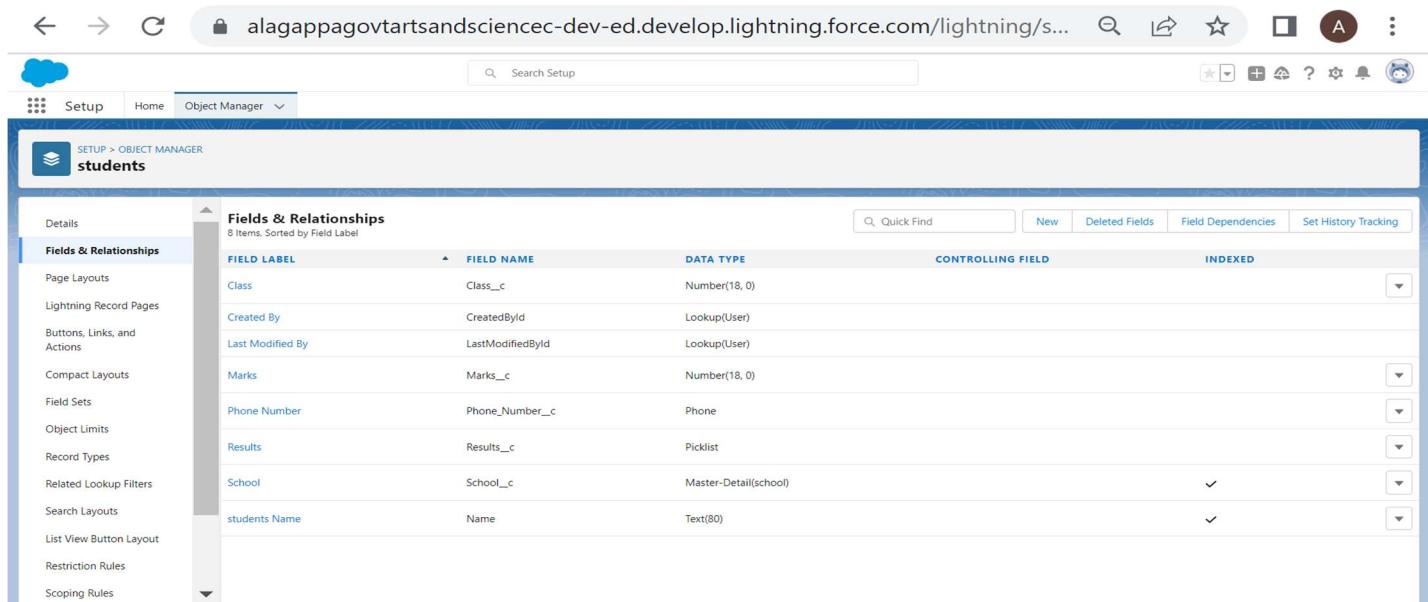


The screenshot shows the Salesforce Object Manager interface for the 'school' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section, which contains 11 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District_c	Text Area(255)		
Highest Marks	Highest_Marks_c	Roll-Up Summary (MAX students)		
Last Modified By	LastModifiedById	Lookup(User)		
Master	Master_c	Master-Detail(school)	✓	
Number of students	Number_of_students_c	Roll-Up Summary (COUNT students)		
Phone Number	Phone_Number_c	Phone		
School	School_c	Text Area(255)		
school Name	Name	Text(80)		

Activity-2

Creation of fields for the student object



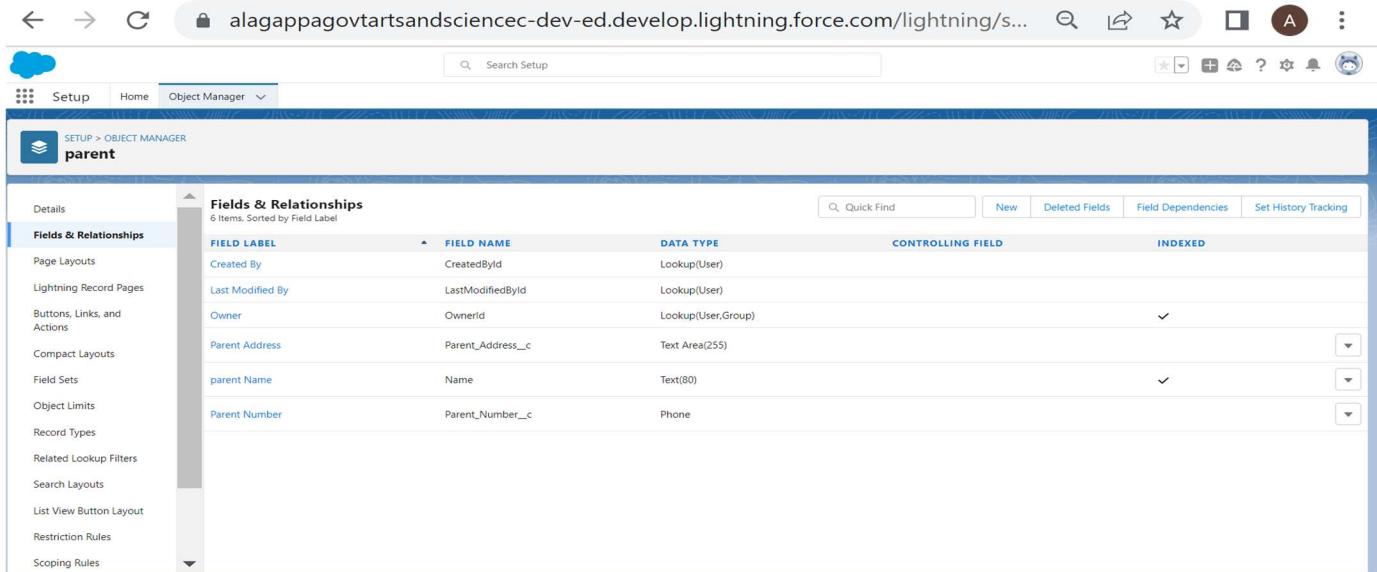
The screenshot shows the Salesforce Object Manager interface for the 'students' object. The left sidebar lists various setup options. The main area displays the 'Fields & Relationships' section, which contains 8 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks_c	Number(18, 0)		
Phone Number	Phone_Number_c	Phone		
Results	Results_c	Picklist		
School	School_c	Master-Detail(school)	✓	
students Name	Name	Text(80)		

PROJECT REPORT

Activity-3

Creation of fields for the parent object



The screenshot shows the Salesforce Object Manager interface for the 'parent' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area displays the 'Fields & Relationships' section with 6 items. The table shows the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Milestone -5: Profile

A profile is a group/collection of settings and permissions that define what a user can do in

salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types,

Login hours & Login IP ranges

Activity:

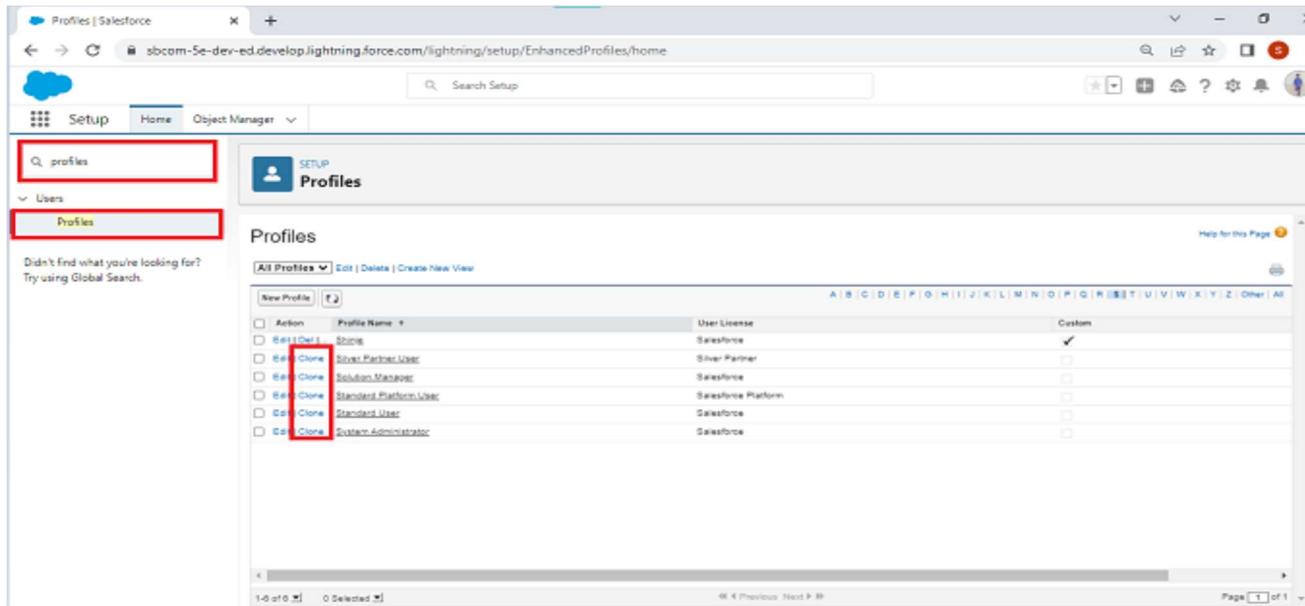
Creation on profile:

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

1. From the list of profiles, find Standard User.

2. Click Clone.

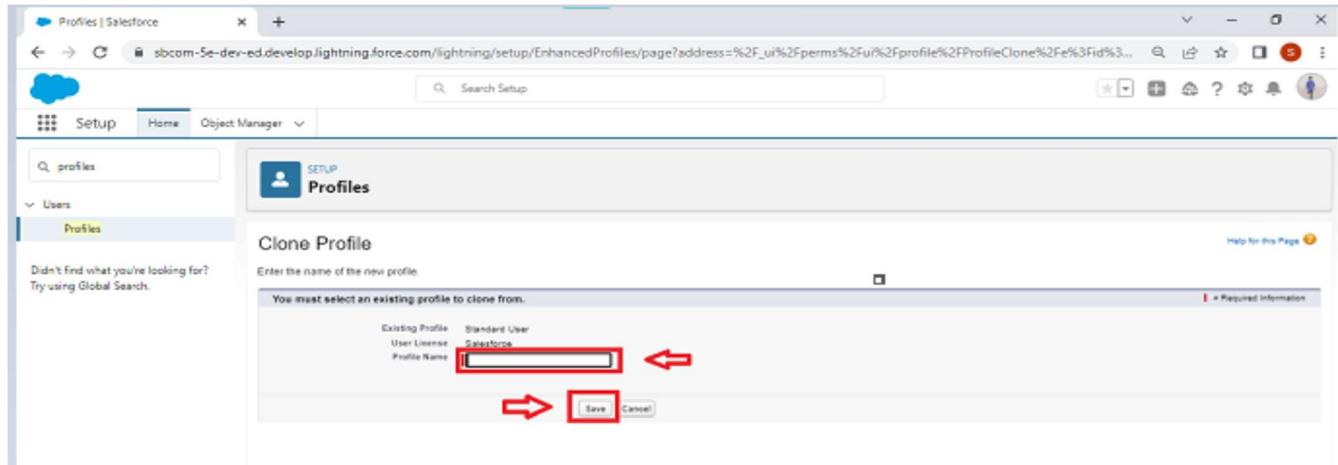
PROJECT REPORT



The screenshot shows the Salesforce Setup interface under the Profiles category. The left sidebar has 'Profiles' selected. The main area displays a list of profiles with columns for Action, Profile Name, User License, and Custom. The 'School' profile is listed with a 'School' User License and a checked 'Custom' box. A red box highlights the 'Edit Clone' button next to the 'School' profile.

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

3. For Profile Name, enter School profile



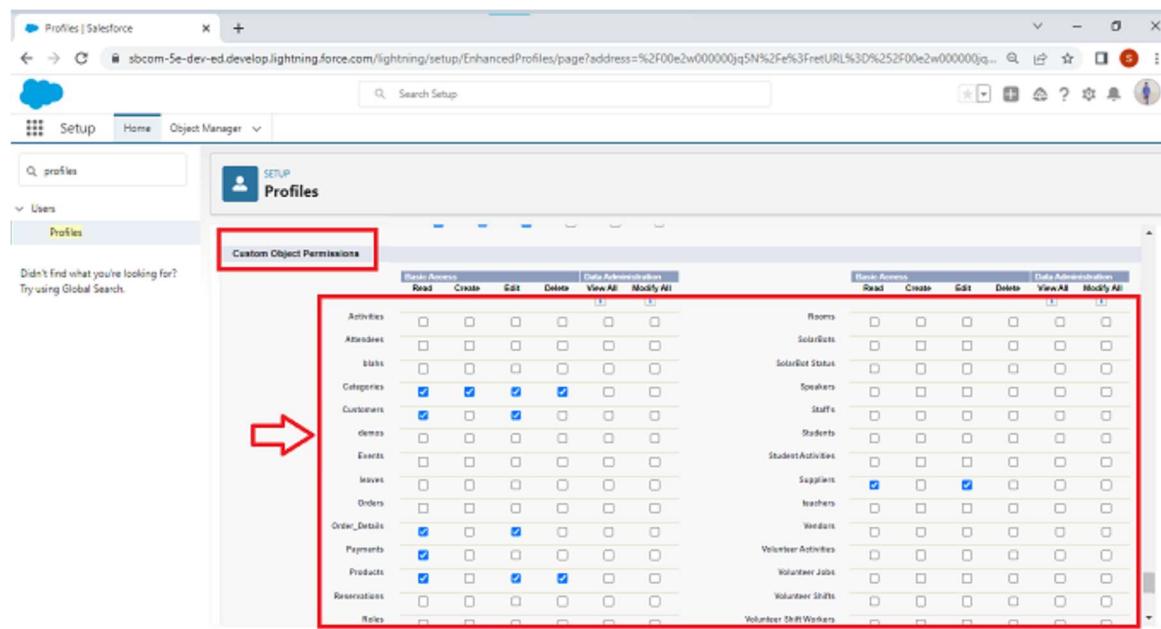
The screenshot shows the 'Clone Profile' page. It prompts the user to enter the name of the new profile and to select an existing profile to clone from. The 'Profile Name' input field is highlighted with a red box. The 'Save' button at the bottom right is also highlighted with a red box.

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

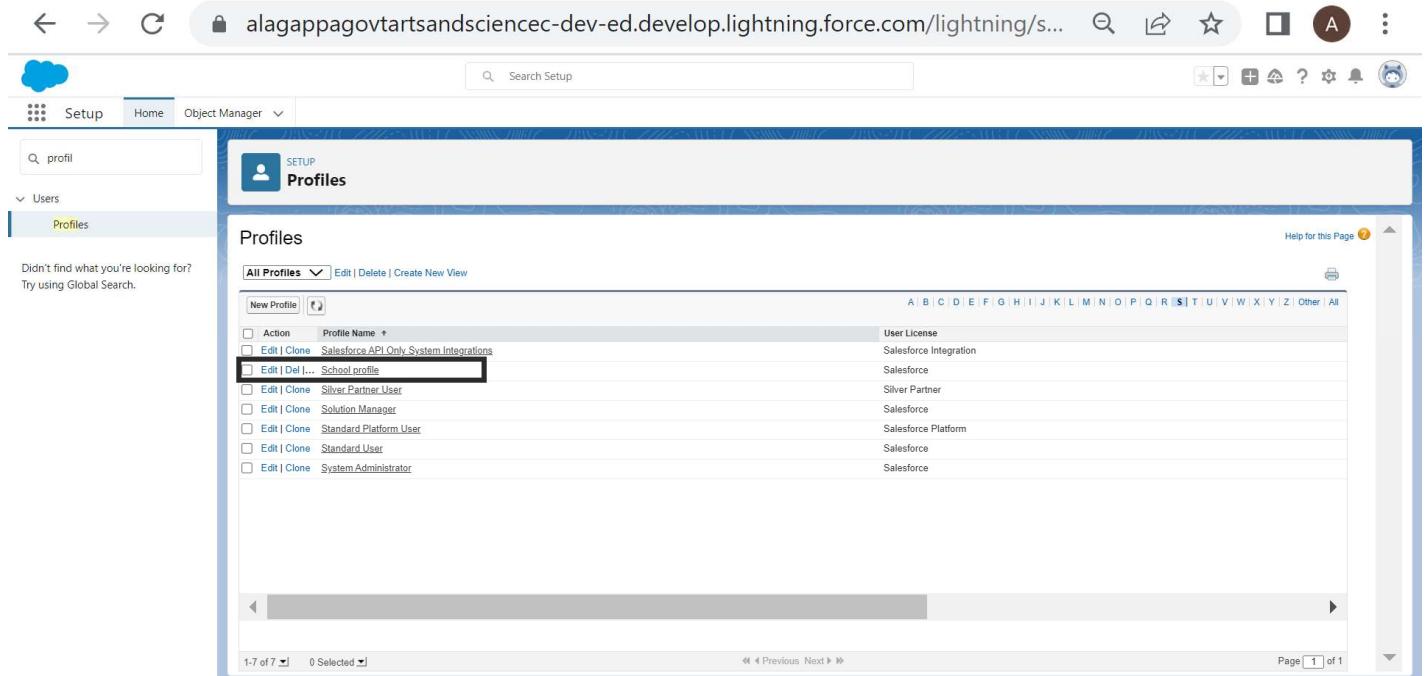
PROJECT REPORT



The screenshot shows the Salesforce Setup interface under the Profiles section. A red box highlights the 'Custom Object Permissions' section, which lists various objects and their permissions (Read, Create, Edit, Delete, View All, Modify All). An arrow points from the text below to this section.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Attendees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Blocks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>							
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Order_Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Soldiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Soldier_Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Staffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Student_Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Suppliants	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Volunteer_Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Volunteer_Jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Volunteer_Shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Volunteer_Shift_Workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

After doing all the above step my result is MY PROFILE



The screenshot shows the Salesforce Setup interface under the Profiles section. A red box highlights the list of profiles, and an arrow points from the text below to this list.

Action	Profile Name	User License
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration
<input type="checkbox"/>	School profile	Salesforce
<input type="checkbox"/>	Silver Partner User	Silver Partner
<input type="checkbox"/>	Solution Manager	Salesforce
<input type="checkbox"/>	Standard Platform User	Salesforce Platform
<input type="checkbox"/>	Standard User	Salesforce
<input type="checkbox"/>	System Administrator	Salesforce

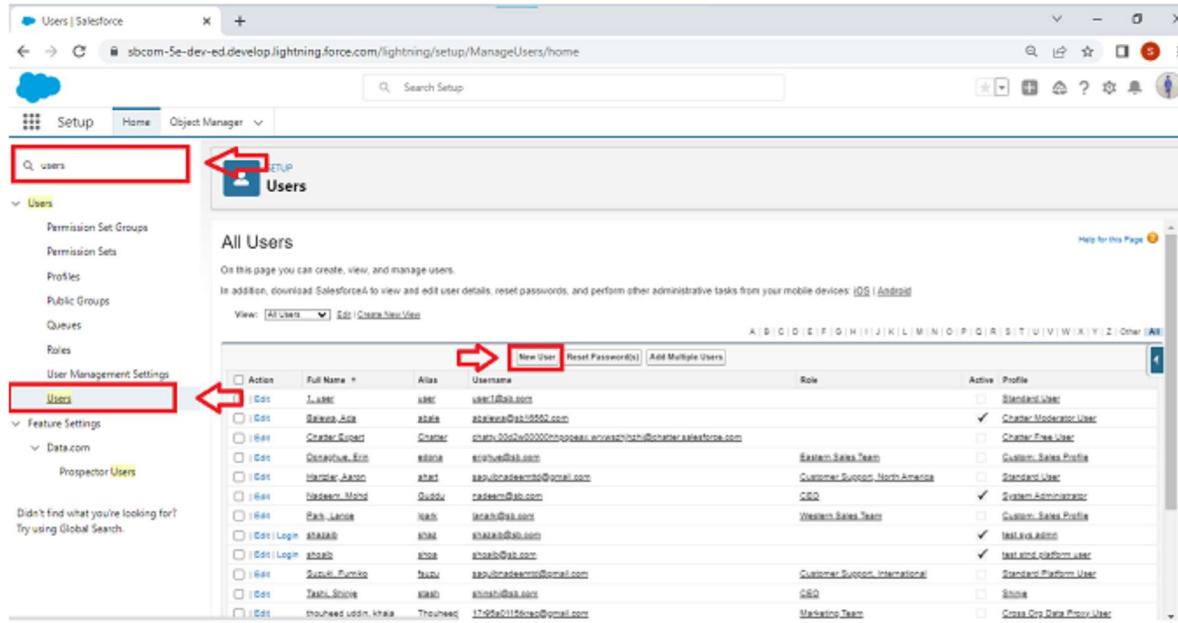
Milestone-6: Users

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

Activity:
Creating Users :

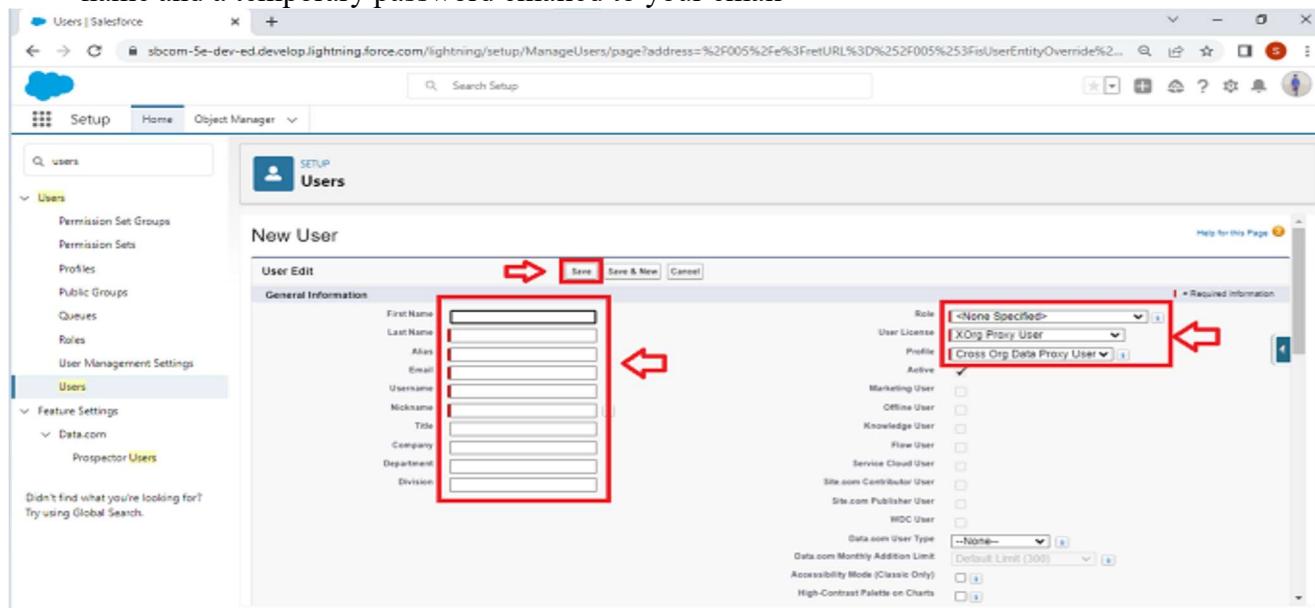
PROJECT REPORT

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.



The screenshot shows the Salesforce Setup interface under the 'Manage Users' section. A red box highlights the 'Q users' search bar at the top left. Another red box highlights the 'Users' link in the left sidebar under 'User Management Settings'. A third red box highlights the 'New User' button at the top right of the main list area. The list displays various user records with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Some profiles are checked (e.g., Standard User, Customer Moderator User). The 'View' dropdown at the top shows 'All Users'.

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

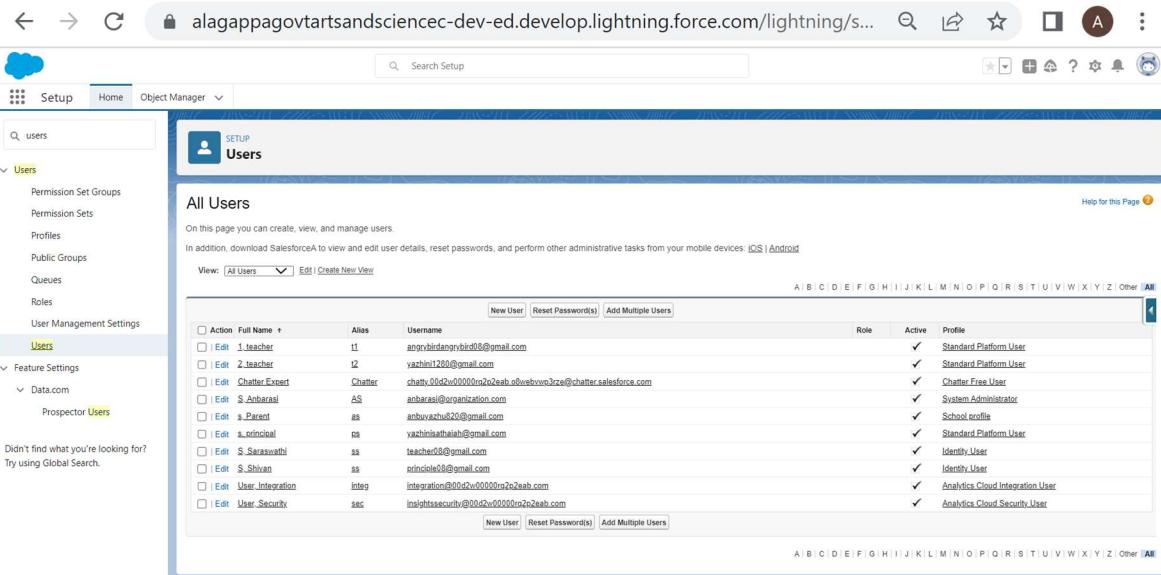


The screenshot shows the 'New User' creation page. A red box highlights the 'Save' button at the top right. Another red box highlights the 'General Information' section on the left, which includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. A third red box highlights the 'User License' dropdown on the right, which is set to 'Cross Org Data Proxy User'. Other dropdowns for Profile and Role are also highlighted with red boxes.

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

Finally done all the above step what I HAVE GOT is below MY USERS

PROJECT REPORT



The screenshot shows the Salesforce Lightning interface. The top navigation bar includes back, forward, search, and other standard browser controls. The URL is alagappagovtartsandsciencec-dev-ed.develop.lightning.force.com/lightning/s.... The main content area is titled "SETUP Users" and displays a table of "All Users". The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The "Role" column lists various user types like Standard Platform User, Chatter Free User, System Administrator, etc. The "Profile" column lists profiles like Standard Platform User, School profile, Standard Platform User, Identity User, Identity User, Analytics Cloud Integration User, and Analytics Cloud Security User. The left sidebar has a "Users" section highlighted with a red box, containing links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings.

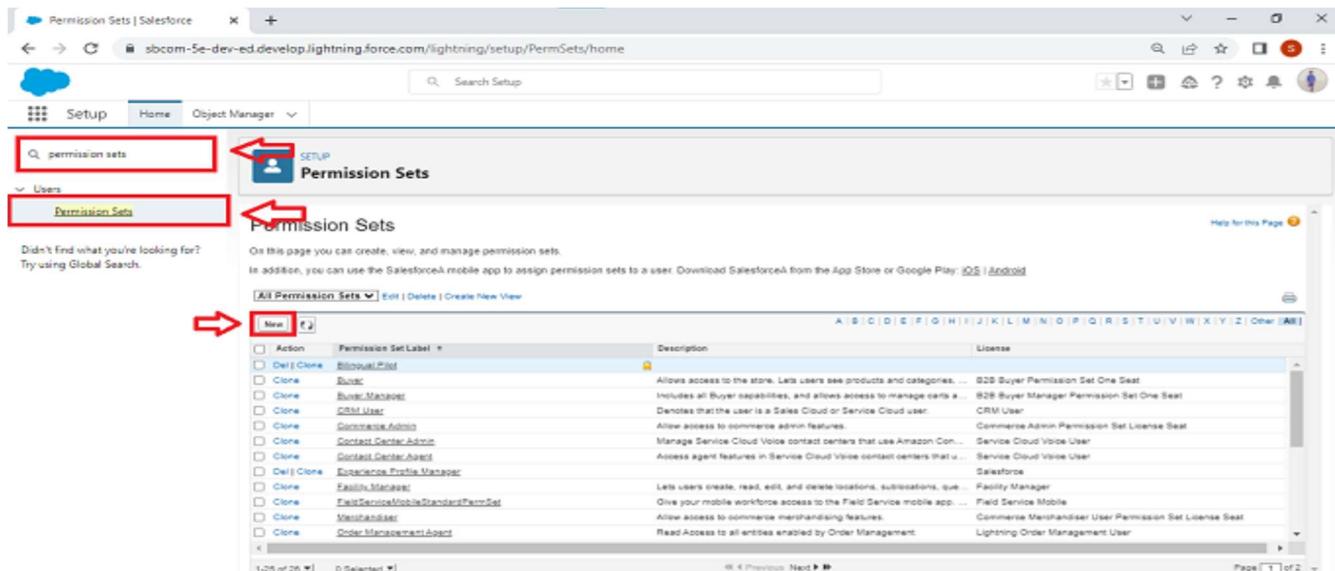
Milestone-7: Permission sets

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:

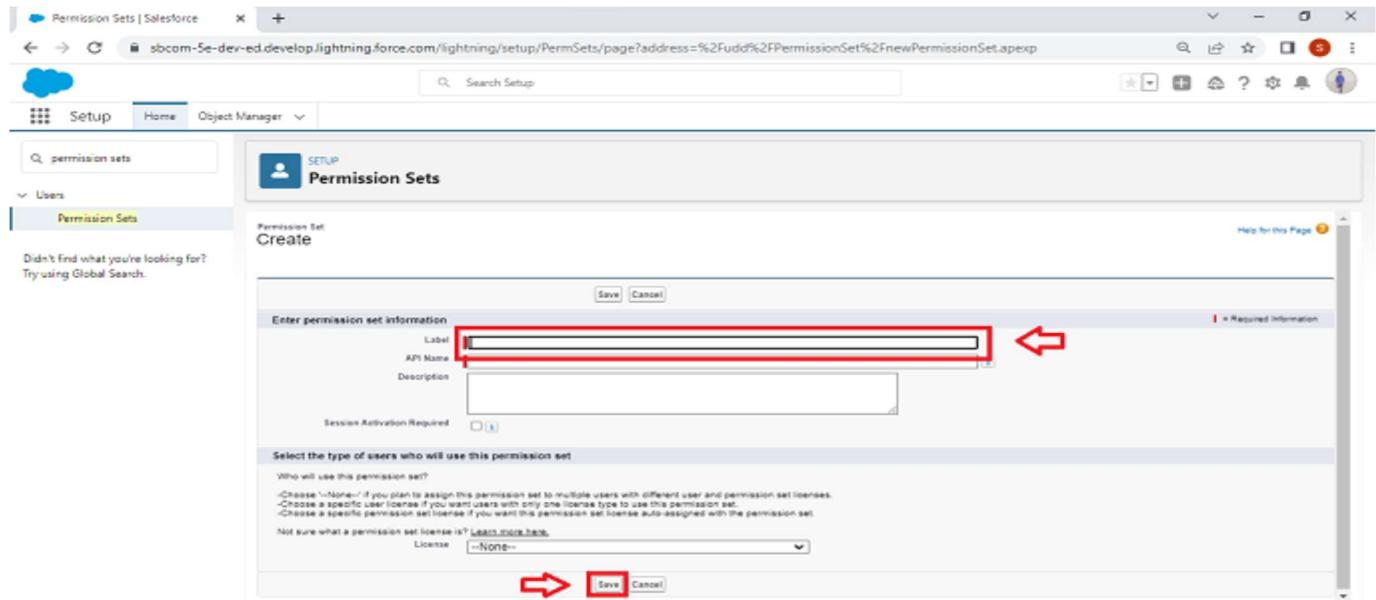
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.



The screenshot shows the Salesforce Lightning interface. The top navigation bar includes back, forward, search, and other standard browser controls. The URL is s1com-se-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home. The main content area is titled "SETUP Permission Sets" and displays a table of "Permission Sets". The table has columns for Action, Permission Set Label, Description, and License. The "Permission Set Label" column lists names like B2B_Buyer_Permission_Set, B2B_Buyer_Manager_Permission_Set, CRM_User, Commerce_Admin_Permission_Set, Service_Cloud_Voice_User, etc. The "Description" column provides a brief overview of each permission set. The "License" column lists the corresponding license for each permission set. The left sidebar has a "Permission Sets" section highlighted with a red box, containing a link for "Permission Sets". A red arrow points to the "New" button at the bottom left of the table.

3. Give the name of the Permission set name as teacher permission and then under the

PROJECT REPORT



Permission Set Create

Enter permission set information

Label: Required Information

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

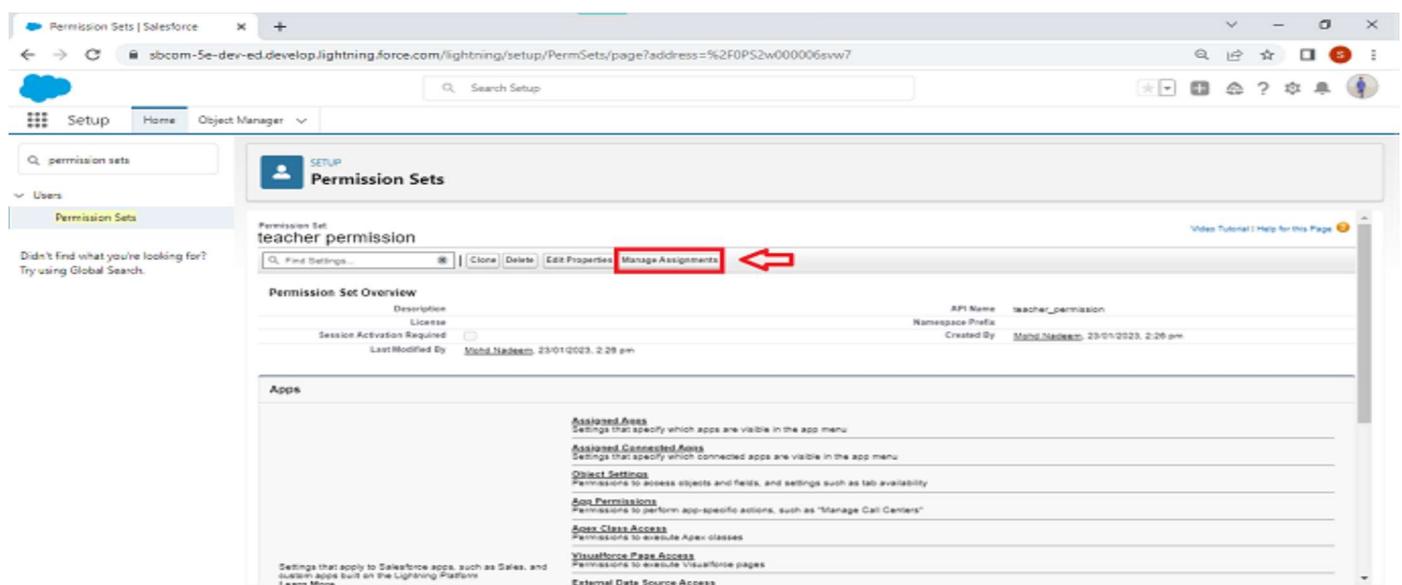
Who will use this permission set?

- 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](#).

License:

Save Cancel



Permission Sets

teacher permission

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview

Description:

License:

Session Activation Required:

Last Modified By: Mohit Nadeem | 23/01/2023, 2:26 pm

API Name: teacher_permission

Namespace Prefix:

Created By: Mohit Nadeem | 23/01/2023, 2:26 pm

Apps

Assigned Apps:

Assigned Connected Apps:

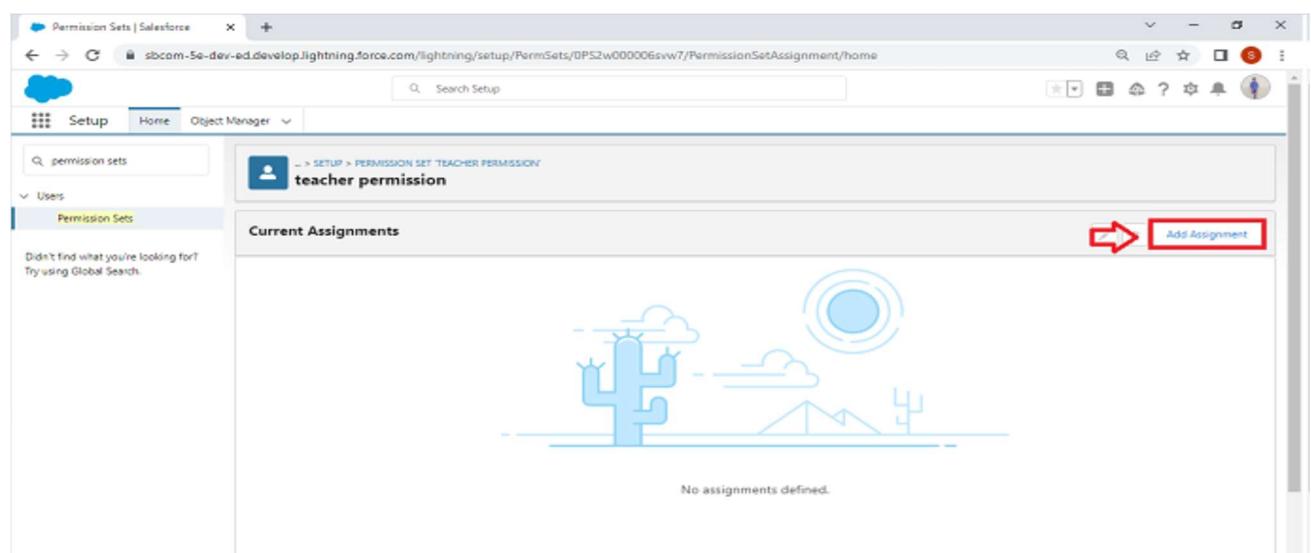
Object Settings:

App Permissions:

Apex Class Access:

Visualforce Page Access:

External Data Source Access:



Permission Sets

teacher permission

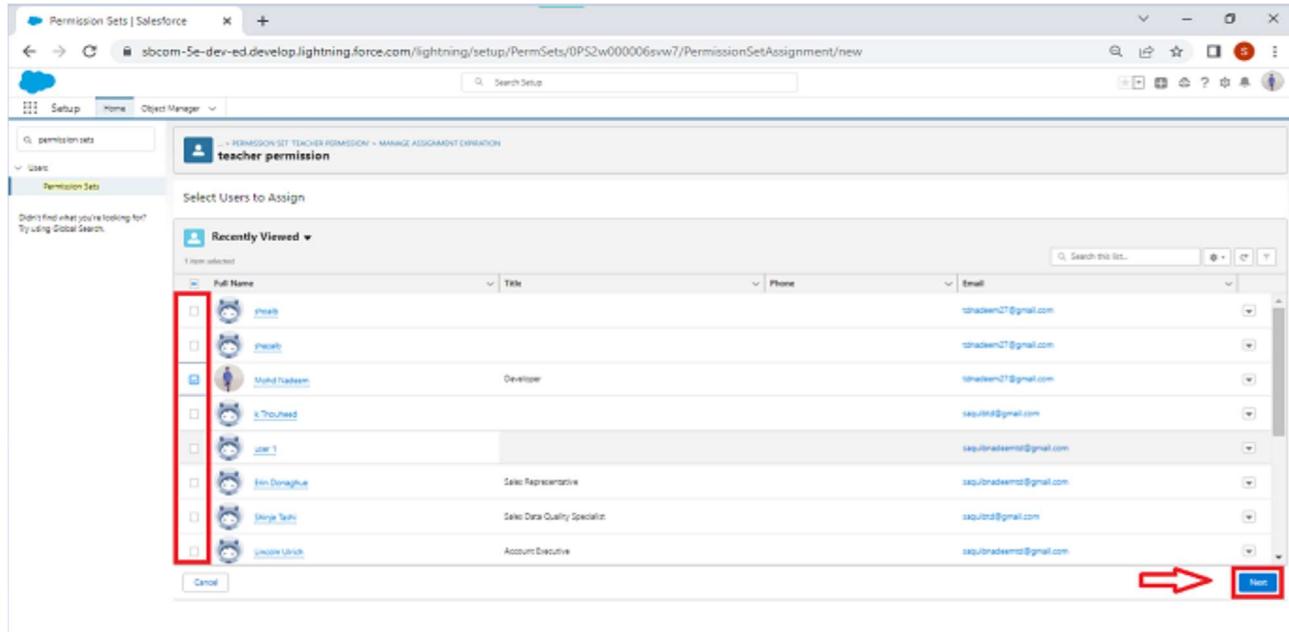
... > SETUP > PERMISSION SET 'TEACHER PERMISSION'

Current Assignments

No assignments defined.

Add Assignment

PROJECT REPORT



The screenshot shows the 'Permission Sets | Salesforce' page in a browser. The URL is sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS2w000006svw7/PermissionSetAssignment/new. The page title is 'PERMISSION SET TEACHER PERMISSION > MANAGE ASSIGNMENT EXPIRATION'. The 'teacher permission' permission set is selected. The 'Select Users to Assign' section contains a list of users with checkboxes. A red box highlights the list area, and a red arrow points to the 'Next' button at the bottom right.

Full Name	Title	Email
Shadeen		shadeen27@gmail.com
Shadeen		shadeen27@gmail.com
Mohd Nadeem	Developer	mohdnadeem27@gmail.com
Shadeen		shadeen27@gmail.com
Zain		zain27@gmail.com
John Donaghy	Sales Representative	john.donaghy@gmail.com
George Taito	Sales Data Quality Specialist	george.taito@gmail.com
Lincoln Ulrich	Account Executive	lincoln.ulrich@gmail.com

Similarly follow the above steps for the permission set 2.

Activity-2:

Permission sets 2:

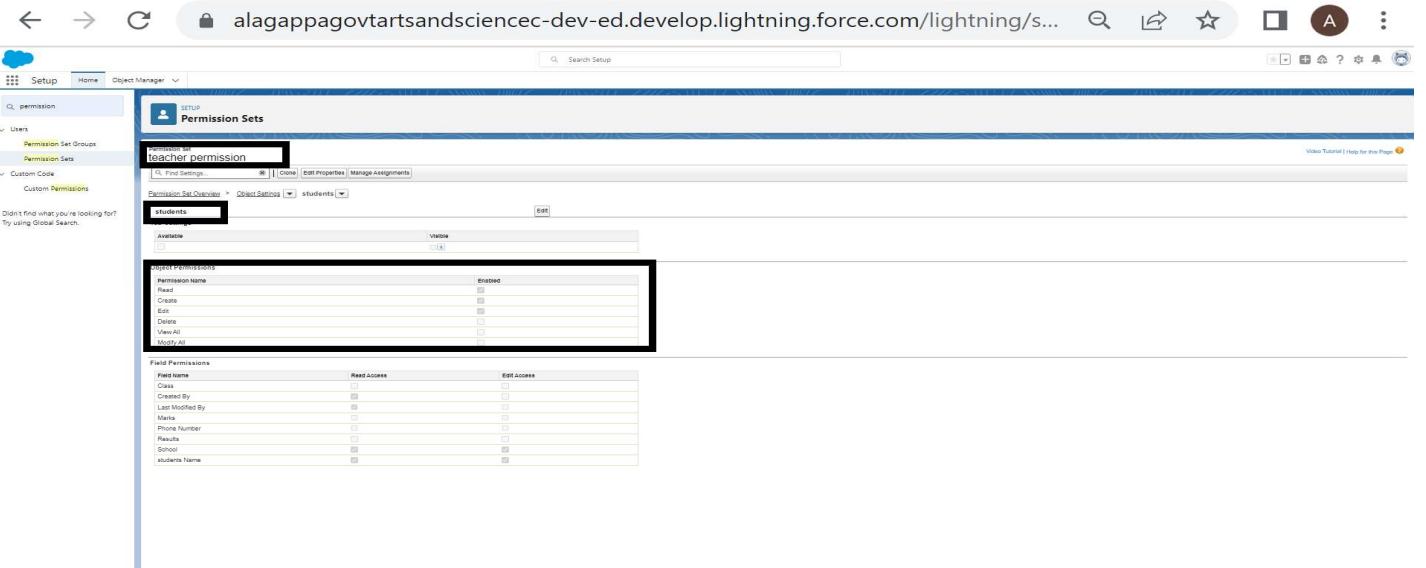
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

After done the above two activity we have this is my result below

Activity-1:

PROJECT REPORT

Teacher permission for school object

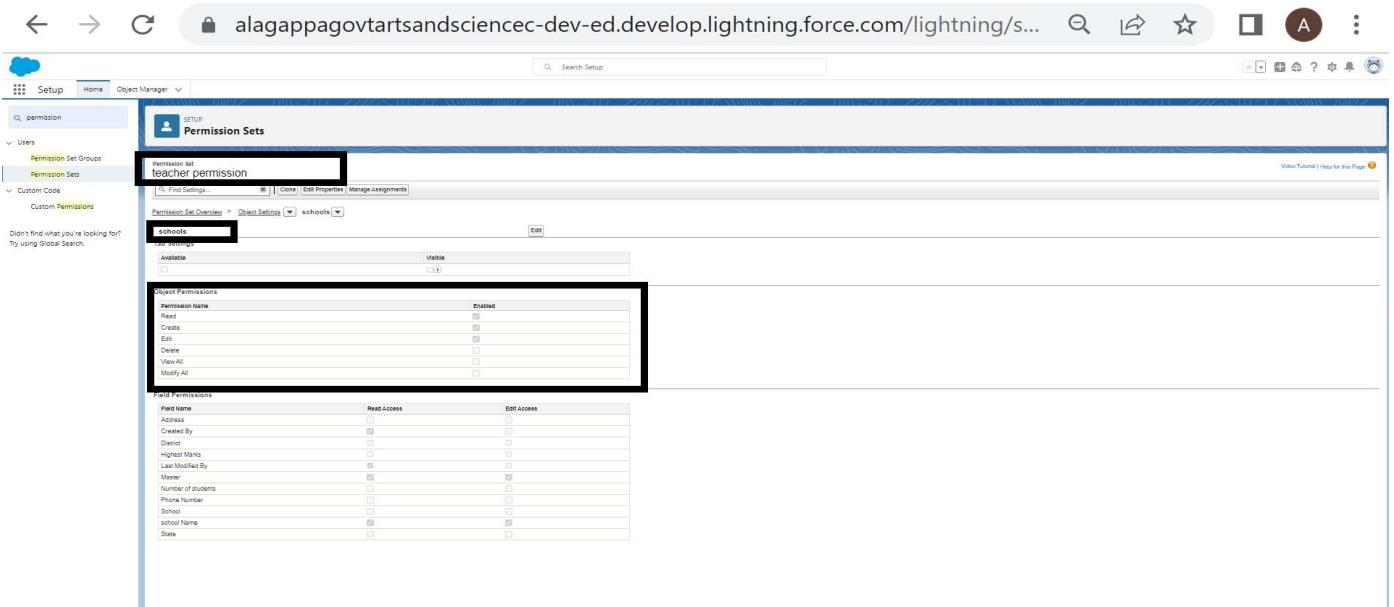


The screenshot shows the Salesforce Setup interface under the 'permission' section. A new permission set named 'teacher permission' is being created. The 'Object Permissions' section is highlighted with a black box. It contains the following data:

Permission Name	Read	Enabled
Read	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Below this, the 'Field Permissions' section is visible but empty.

Teacher permission for student object

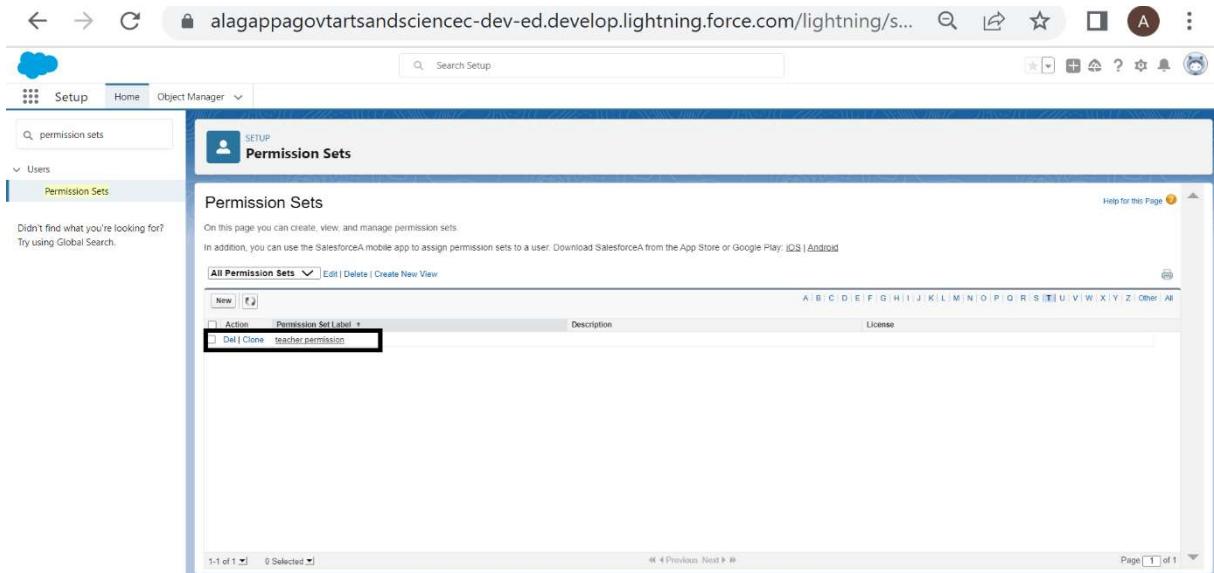


The screenshot shows the Salesforce Setup interface under the 'permission' section. A new permission set named 'teacher permission' is being created. The 'Object Permissions' section is highlighted with a black box. It contains the following data:

Permission Name	Read	Enabled
Read	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>	<input checked="" type="checkbox"/>

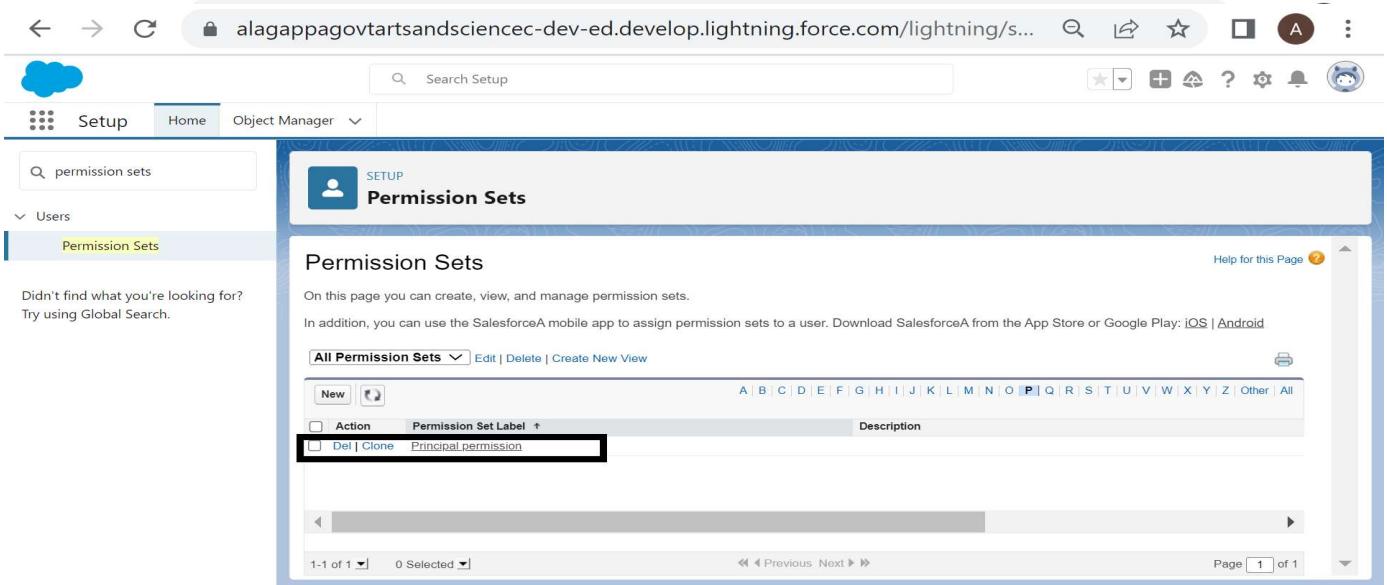
Below this, the 'Field Permissions' section is visible but empty.

PROJECT REPORT



The screenshot shows the Salesforce Lightning interface with the URL <https://alagappagovtartsandsciencec-dev-ed.lightning.force.com/lightning/s/>. The page title is "Permission Sets". The left sidebar shows "Setup", "Home", and "Object Manager". The main content area displays a table of permission sets. One row is selected, showing "teacher permission" in the "Permission Set Label" column. The table includes columns for "Action", "Description", and "License". A navigation bar at the bottom shows "1-1 of 1" and "0 Selected".

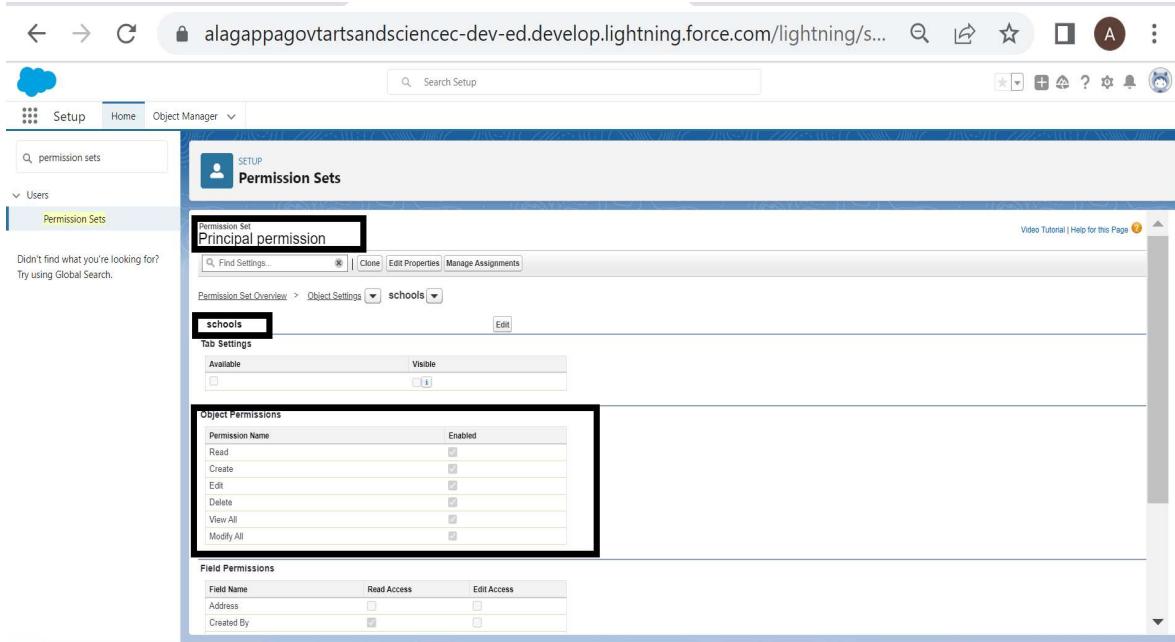
Activity-2:



The screenshot shows the Salesforce Lightning interface with the same URL and page title. The left sidebar shows "Setup", "Home", and "Object Manager". The main content area displays a table of permission sets. One row is selected, showing "Principal permission" in the "Permission Set Label" column. The table includes columns for "Action", "Description", and "License". A navigation bar at the bottom shows "1-1 of 1" and "0 Selected".

PROJECT REPORT

Principal permission for school object



Permission Set Overview > Object Settings schools

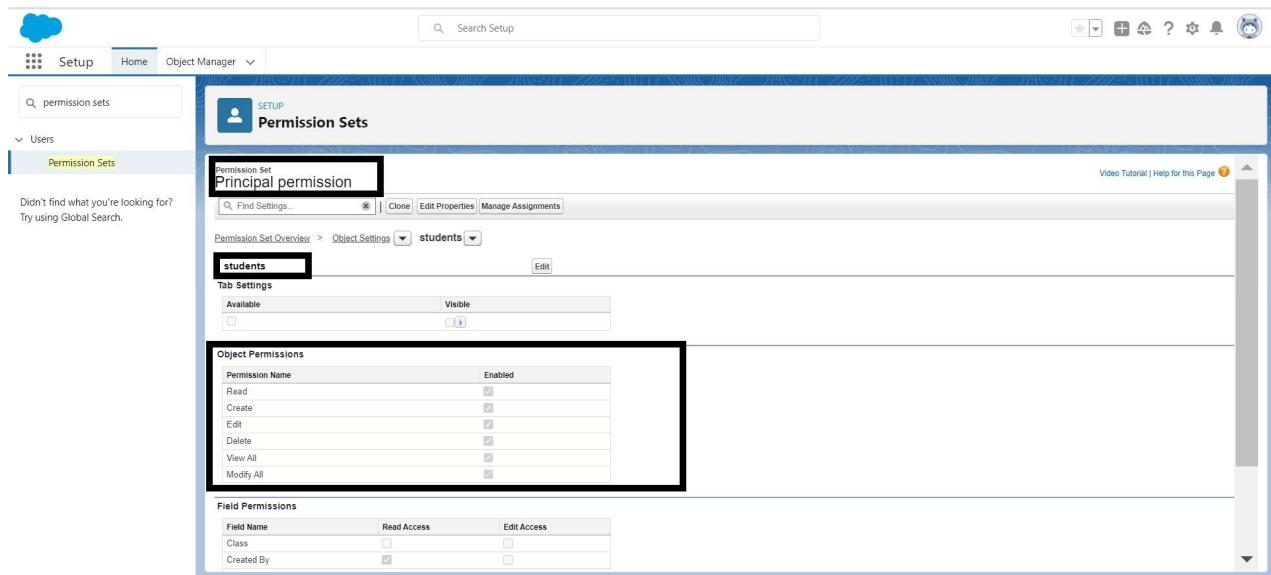
Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Address	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Principal permission for student object



Permission Set Overview > Object Settings students

Object Permissions

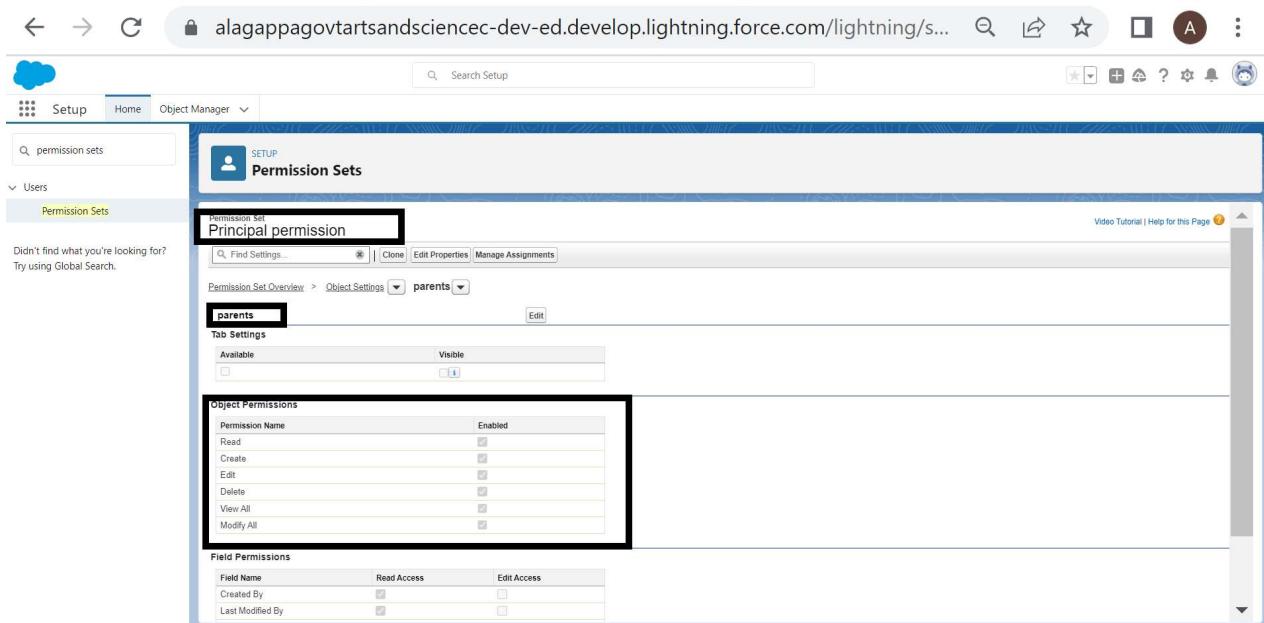
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Class	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

PROJECT REPORT

Principal permission for Parent object



The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A specific permission set named 'Principal permission' is selected. The 'Object Permissions' section is highlighted with a black box, showing permissions for the 'parents' object. Under 'Object Permissions', the 'Enabled' column has checkboxes for Read, Create, Edit, Delete, View All, and Modify All. Below this, the 'Field Permissions' section shows 'Created By' and 'Last Modified By' fields with checkboxes for Read Access and Edit Access.

Milestone-8: Reports

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

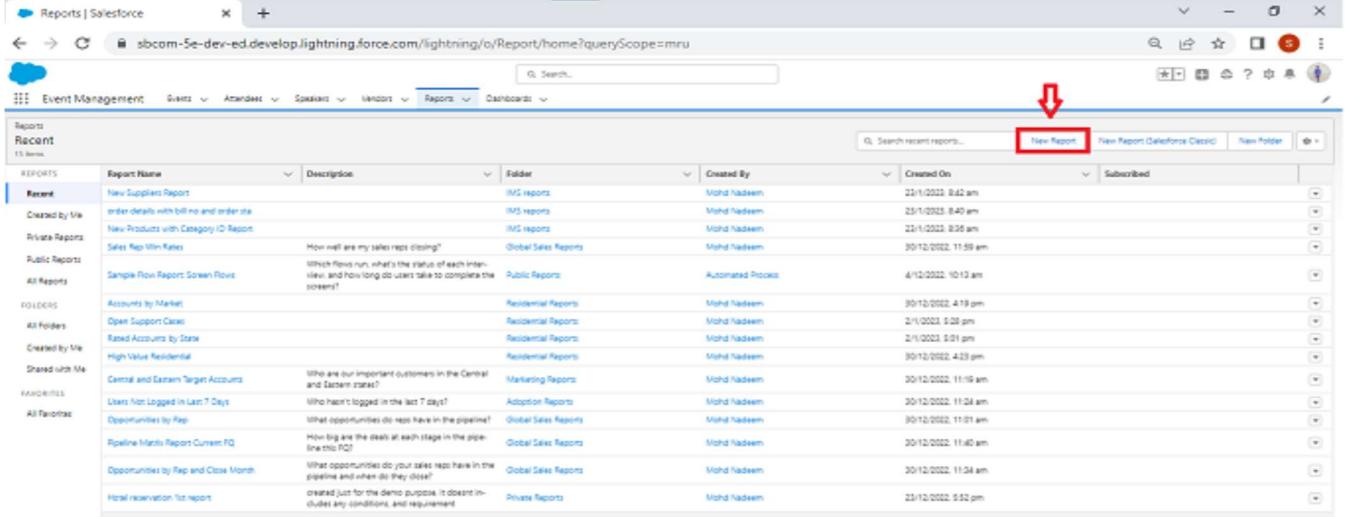
rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is

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

Activity:

Reports :

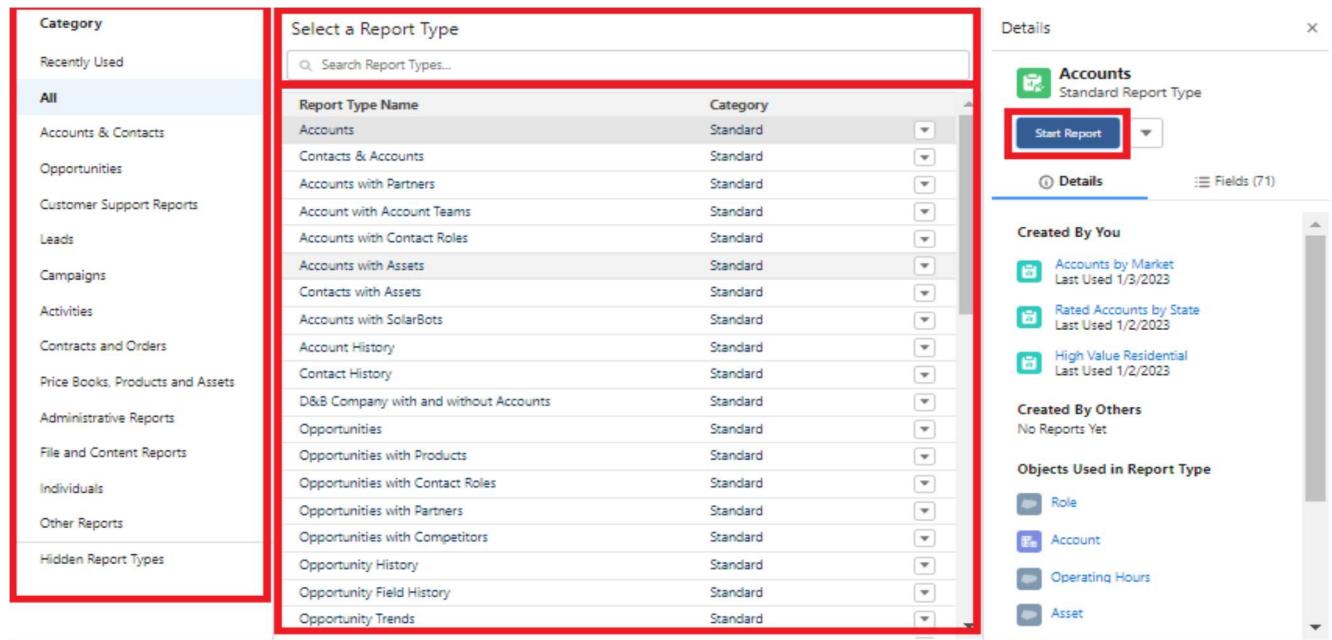
1. From the Reports tab, click New Report



The screenshot shows the Salesforce Reports tab. On the right side, there is a search bar for 'Search recent reports...' and a red box highlights the 'New Report' button. The main area displays a list of various reports categorized by type (e.g., Recent, Created by Me, Public Reports) and folder (e.g., Event Management, Sales, Marketing). Each report entry includes details like Report Name, Description, Folder, Created By, and Created On.

Report Name	Description	Folder	Created By	Created On
New Suppliers Report	order details with bill no and order date	IMS Reports	Mohd Nadeem	23/1/2023, 8:42 am
New Products with Category ID Report		IMS Reports	Mohd Nadeem	23/1/2023, 8:49 am
Sales Rep Win Rates	How well are my sales reps doing?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:59 am
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 Reports	4/12/2022, 10:12 am
Accounts by Market		Residential Reports	Mohd Nadeem	30/12/2022, 4:19 pm
Open Support Cases		Residential Reports	Mohd Nadeem	2/1/2023, 5:28 pm
Rated Accounts by State		Residential Reports	Mohd Nadeem	2/1/2023, 5:31 pm
High Value Residential		Residential Reports	Mohd Nadeem	30/12/2022, 4:23 pm
Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern zones?	Marketing Reports	Mohd Nadeem	30/12/2022, 11:19 am
Users Not Logged In Last 7 Days	Who hasn't logged in in the last 7 days?	Adoption Reports	Mohd Nadeem	20/12/2022, 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 Matrix Report Current FQ	How big are the deals at each stage in the pipeline this FQ?	Global Sales Reports	Mohd Nadeem	20/12/2022, 11:40 am
Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when did they close?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:34 am
Hotel Reservation Test Report	created just for the demo purpose. It doesn't include any condition, and requirement	Private Reports	Mohd Nadeem	23/12/2022, 5:21 pm

PROJECT REPORT



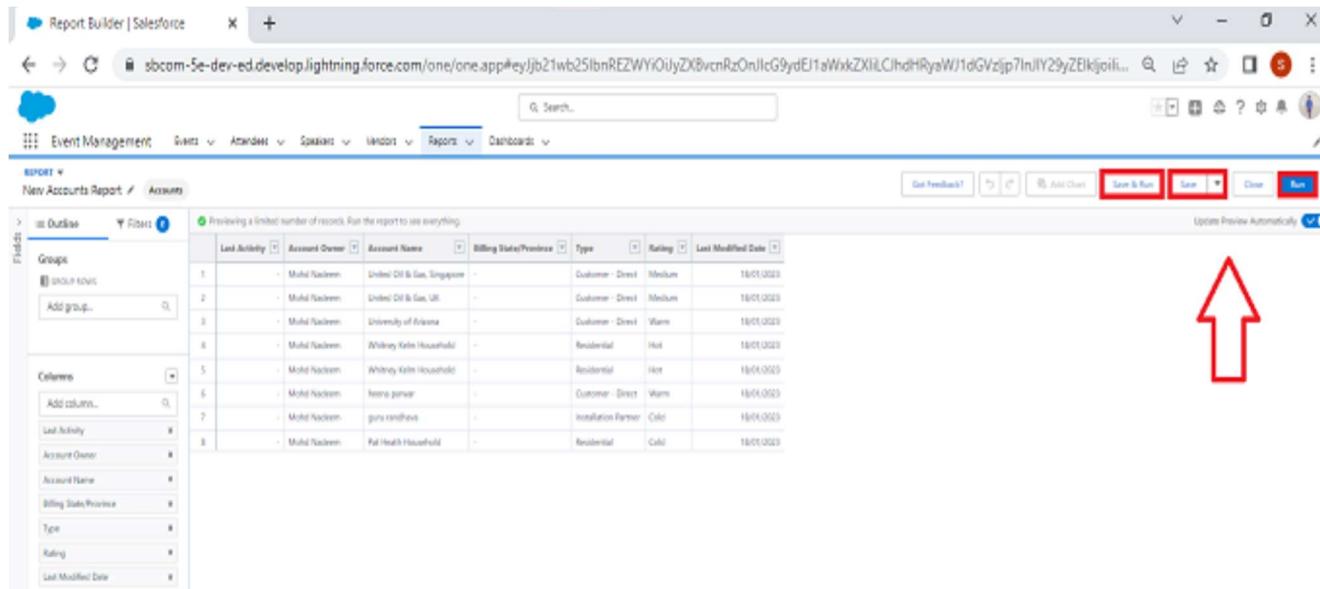
The screenshot shows the 'Select a Report Type' section with a red border. It lists various report types under 'Report Type Name' and their corresponding 'Category'. A specific report type, 'Accounts', is highlighted with a red box. To the right, a 'Details' panel is open for 'Accounts'.

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 Panel (Accounts):

- Accounts** Standard Report Type
- Start Report** (button)
- 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

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



The screenshot shows the 'Event Management' section of the Salesforce Report Builder. A red arrow points to the 'Save & Run' button in the top right corner of the preview area.

REPORT: New Accounts Report

Fields:

- Last Activity
- Account Owner
- Account Name
- Billing State/Province
- Type
- Rating
- Last Modified Date

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

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, Ull.		Customer - Direct	Medium	18/01/2023
3	Mohd Nadeem	University of Alabama		Customer - Direct	Warm	18/01/2023
4	Mohd Nadeem	Whitney Keltie Household		Residential	Hot	18/01/2023
5	Mohd Nadeem	Whitney Keltie Household		Residential	Hot	18/01/2023
6	Mohd Nadeem	Home power		Customer - Direct	Warm	18/01/2023
7	Mohd Nadeem	guru rishabh		Insulation Partner	Cold	18/01/2023
8	Mohd Nadeem	Pat Heath Household		Residential	Cold	18/01/2023

Buttons:

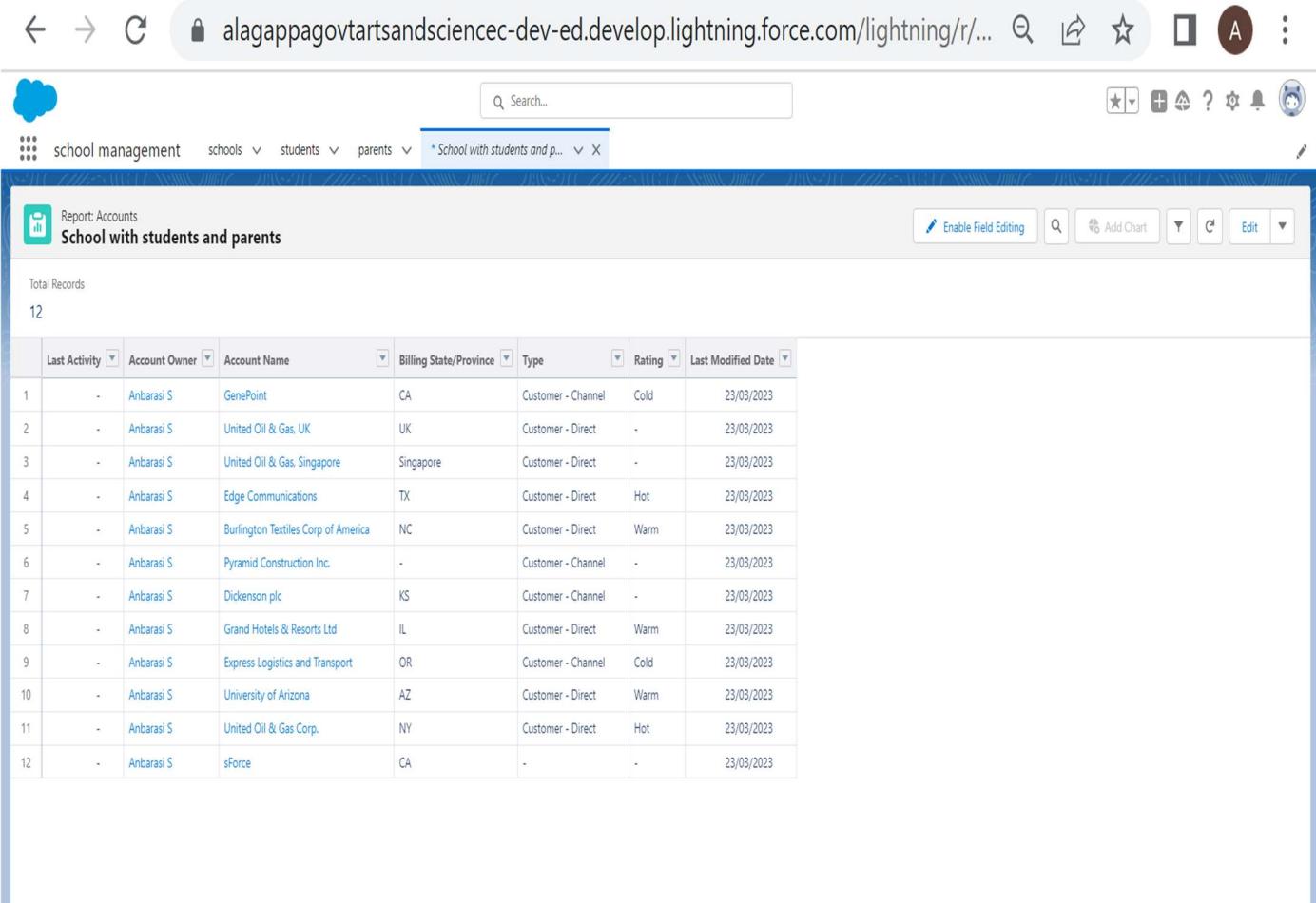
- Get Feedback
- Run
- Add Chart
- Save & Run
- Save
- Close
- Run

Update Preview Automatically:

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

PROJECT REPORT

Finally my report is below and the below is my report result and I show you MY REPORT



The screenshot shows a Salesforce Lightning component for a report titled "School with students and parents". The report lists 12 records of account information. The columns are: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The data is as follows:

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Anbarasi S	GenePoint	CA	Customer - Channel	Cold	23/03/2023
2	-	Anbarasi S	United Oil & Gas, UK	UK	Customer - Direct	-	23/03/2023
3	-	Anbarasi S	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	23/03/2023
4	-	Anbarasi S	Edge Communications	TX	Customer - Direct	Hot	23/03/2023
5	-	Anbarasi S	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	23/03/2023
6	-	Anbarasi S	Pyramid Construction Inc.	-	Customer - Channel	-	23/03/2023
7	-	Anbarasi S	Dickenson plc	KS	Customer - Channel	-	23/03/2023
8	-	Anbarasi S	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	23/03/2023
9	-	Anbarasi S	Express Logistics and Transport	OR	Customer - Channel	Cold	23/03/2023
10	-	Anbarasi S	University of Arizona	AZ	Customer - Direct	Warm	23/03/2023
11	-	Anbarasi S	United Oil & Gas Corp.	NY	Customer - Direct	Hot	23/03/2023
12	-	Anbarasi S	sForce	CA	-	-	23/03/2023

4.Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/anbarasi08>

Team Member-1: <https://trailblazer.me/id/afrinbegam123>

Team Member-2: <https://trailblazer.me/id/gayumani>

Team Member-3: <http://trailblazer.me/id/jeyasudha123>

PROJECT REPORT

5 ADVANTAGES AND DISADVANTAGES

Advantage

- Improve student Admission lifecycle.
- History of work with each student.
- Relevant and visual MIS Analytics Reports.
- Connect insights across recruitment and admission, students experience, advancement and marketing for a 360 – degree view of every constituent.
- A unified view of constituent information.
- The flexibility needed to pivot quickly.
- Personalized communications.
- Educational organization to more effectively manage leads, including lead scoring and personalized follow-up.
- Allows for easier collaboration.

Disadvantage

- A costly project.
- Not suitable for every business.
- It eliminates the human element.

PROJECT REPORT

- May also loss of collection of data or records.
- Poor communication.
- Lack of leadership.
- A waste of time if used incorrectly.
- Burdensome data entry.
- Staff resistance.
- Third party access.

6.APPLICATION

- Tracking customers.
- Improving interactions and communications.
- Inbuild reports dashboards to analyses the results.
- Improved student engagement by tracking the student academic performance, attendance, and behavior and This enables the institution to identify struggling students take the correct measure.
- Streamlined administrative tasks; A CRM system simplifies administrative tasks such as student enrollment, attendance monitoring and grading.

PROJECT REPORT

- CRM Application is an innovative initiative that schools and colleges can embrace to improve their processes, enhancing their relationships with parents, students and the community at large.

7.CONCLUSION

- The implementation of a CRM application in school or college management has proven to be an effective solution to enhance the student experience and streamline administrative tasks.
- A CRM application are able to maintain the communications with students and parents and track the student academic year progress and respond the inquiry in a quick manner.
- The application provides the centralized platform for managing student data, implementing targeted marketing strategies and enabling intelligent decision making.
- In adoption of a CRM Application in the school or college management is integral to the future success for the two management.
- By using the application you can definitely get the success in your field.
- It is a single platform to interact the whole members.

PROJECT REPORT

8. FUTURE SCOPE

- All in all, an effective CRM for educational institution help the organization improve operations and trim expenses and grow revenues.
- Focuses soft net offers customizable and diverse, scalable and anon stop CRM for educational institutions. It is the best CRM for higher education, schools and other institutes that is fully equipped to support mobility and modern- day necessities.
- The admission process can be tricky. It needs wide-reaching strategies to pull in the interest of the target demographics of students.
- On the top of the dealing with a constant influx of applications from different region and using various technology channels is too overwhelming to manage manually.