



# A CRM APPLICATION ON E-COMMERCE ACTIVITIES

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PROJECT REPORT

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# **CHAPTER-1**

## **PROJECT SPECIFICATION**

### **1.1 Project Goal**

The goal of school administration is to create an environment in which all students can demonstrate continuous academic improvement. The superintendent must possess leadership qualities which motivate all staff members to improve the educational program and to attain the board's goals and objectives.

- Operational Efficiency: School is one of the basic necessities of Human beings School is like heaven and the teacher is god for the students.
- Customer Engagement: School management is a very wide field and this work needs a lot of personnel to run this management as any other organization.
- Growth: The first objective of this system is to maintain the data of all the student and teacher in database. It maintains the personal record as well as the academic record of the student. It maintains student fee record and dues record. Teacher personal record and salary record are also store in the software
- Data Management: A school management system is a software application that is designed to streamline various administrative tasks within a school.
- Automation: Introduce automation through triggers, flows, and approval processes to reduce manual tasks and improve accuracy in coupon generation and record keeping.

## **1.2 Project Scope**

The scope of the School management Application project is comprehensive and covers various aspects of students. This project encompasses the following key components:

1. Custom Object Creation: Anything done to improve the quality of education at any stage may be ranging from the supply of material, human and financial resources to the highest cultural or academic needs-comes.
2. Application used: Scope is the set of features, functions, and requirements that the web app must deliver to meet the needs and expectations of the stakeholders.
3. User Profiles and Roles: The project scope is the total amount of work that needs to be done to complete a project. To define it, project managers must break down the project into the tasks and deliverables.
4. Automation: Implementing automation through triggers, flows, and approval processes to automate processes like coupon generation based on employee types, data validation, and record updates.
5. Reports and Dashboards: Developing various report types, including tabular, summary, and matrix reports, to provide insights into customer data, product sales, and financial performance. Creating dashboards for data visualization.
6. Data Modeling: Designing the data model with relationships between objects to enable efficient data management, allowing the creation of customer records, order details, and coupon management.
7. Security and Access Control: Ensuring data security and access control through user profiles, roles, and sharing rules to safeguard sensitive information.

### **1.3 Problem Statement Definition**

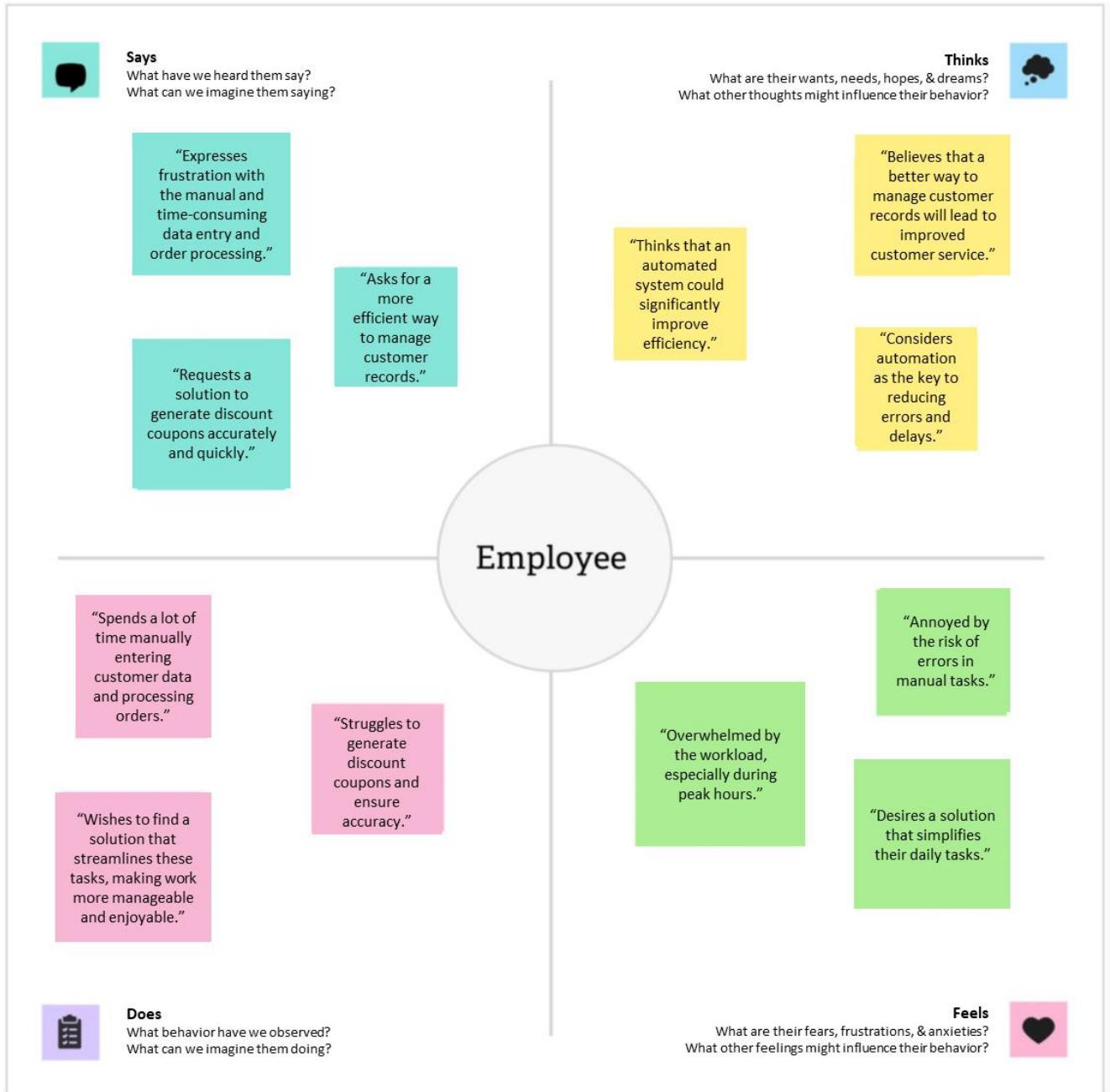
<b>Problem for</b>	<b>Trying to</b>	<b>But</b>	<b>Which makes</b>
<b>Students</b>	Poor communication between parents and school staff is a major problem that contributes to the overall ineffective management of schools.	When parents and teachers are not able to communicate effectively, it can have a negative impact on the entire school community & learning.	This makes me feel overwhelmed and hinders our ability to provide a seamless student experience.

### **1.4 Empathy Map Canvas**

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it.

The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



## 1.5 Proposed Solution

S. No	Parameter	Description
1.	Problem Statement	The problem to be solved is the manual and time-consuming management of customer records, order processing, and discount coupon generation, leading to inefficiencies and the risk of errors.
2.	Idea / Solution Description	The proposed solution is to create a Salesforce-based School Management system. This system will include custom objects for managing customer records, consultants, retailers, and other employees. Automation tools like triggers and flows will streamline data entry, order processing, and coupon generation. The solution will also provide comprehensive reports and dashboards for insights and decision-making.
3.	Novelty / Uniqueness	The uniqueness of this solution lies in its customized implementation using Salesforce. The automation of routine tasks, such as coupon generation based on employee roles, is novel and addresses the specific needs of cosmetics stores.
4.	Social Impact Satisfaction	The solution is expected to significantly improve customer satisfaction by reducing processing times, minimizing errors, and enhancing the overall shopping experience. It will also lead to improved data management, enabling better customer engagement and personalized services. This project contributes to the efficient management of cosmetics stores, potentially impacting the business's social and financial aspects positively.

## 1.6 Functional & Technical Requirements

### 1.6.1 Functional Requirements

Requirement	Description
Object Creation	Create custom objects for "Our schools," "Students," "Teachers," and "Others" to manage student data, order details, and student information.
User Profiles and Roles	Set up user profiles and roles to control access and permissions for different user groups, including "Store data" and "Reports Operator."
Automation	Implement automation using triggers, flows, and approval processes to automate coupon generation, data validation, and record updates.
Reports and Dashboards	Develop various report types, including tabular, summary, and matrix reports, to provide insights into customer data, product sales, and financial performance. Create dashboards for data visualization.
Data Modeling	Design the data model with relationships between objects to enable efficient data management, allowing the creation of customer records, order details, and coupon management.

### 1.6.2 Technical Requirements

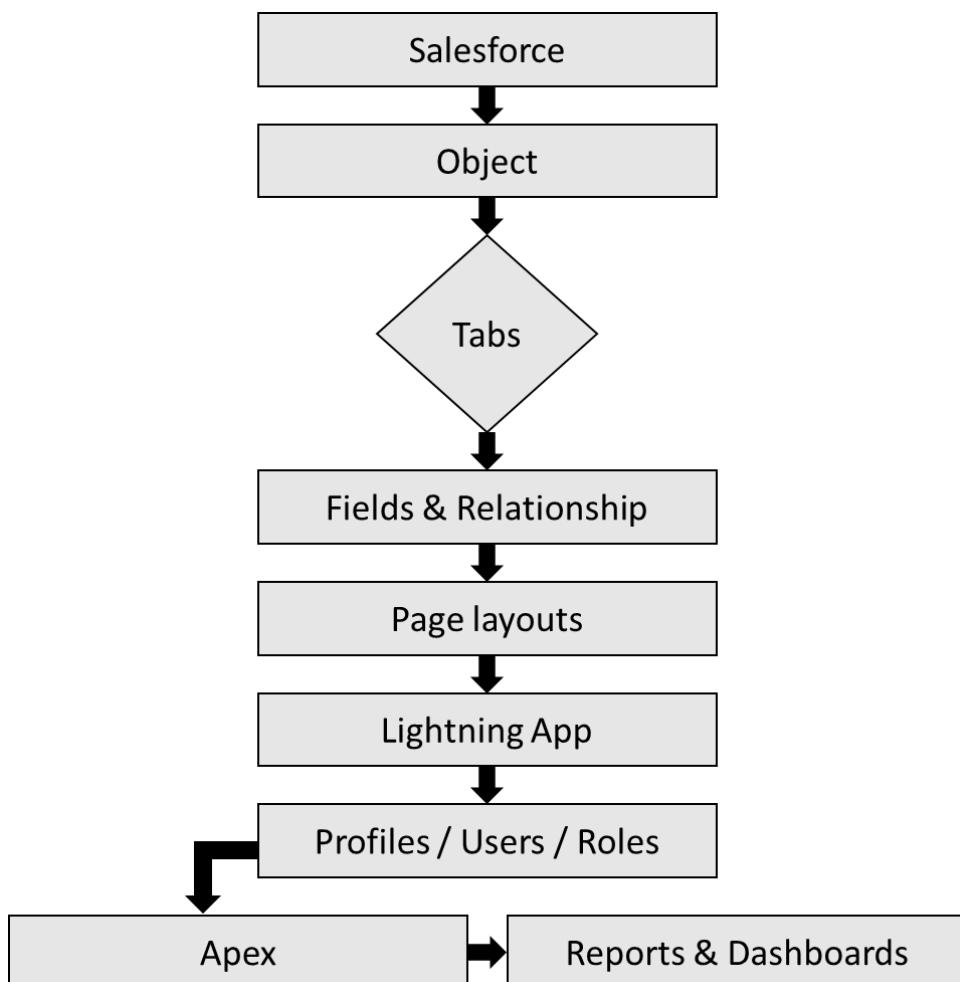
Requirement	Description
Salesforce Developer Org	Create a Salesforce developer org for project development and testing.
Lightning App	Create a Lightning app to brand the application and provide a customized color scheme and logo.
Automation Tools	Use Apex triggers and flows to implement automation in the system.
Security and Access Control	Configure security settings using user profiles, roles, and sharing rules to control access to sensitive data.

User Training	Provide user training and documentation for effective adoption of the Salesforce system within the cosmetics store.
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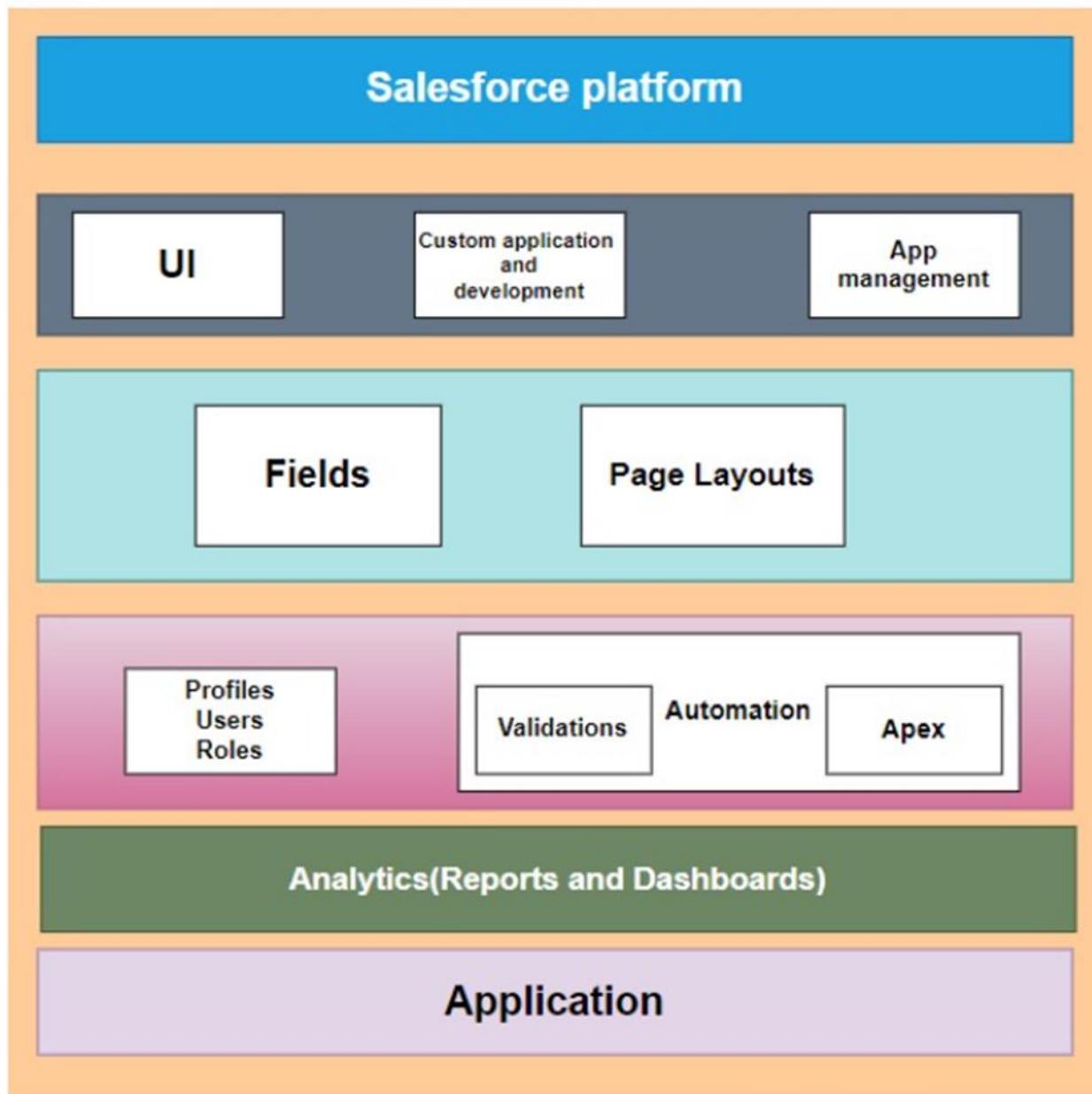
## 1.7 Project Road Map

### 1.7.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



### 1.7.2 Technical Architecture



## CHAPTER-2

# PREPARATION DATA MODELING

### 2.1 Salesforce Developer Org

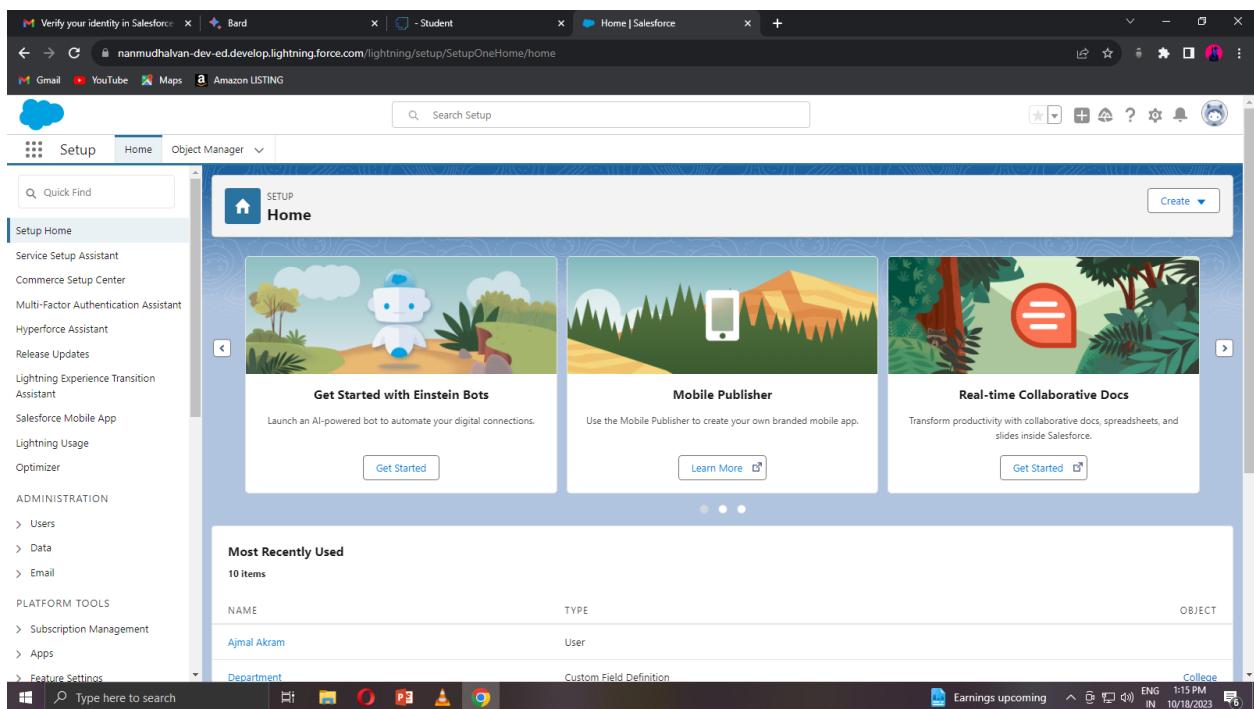
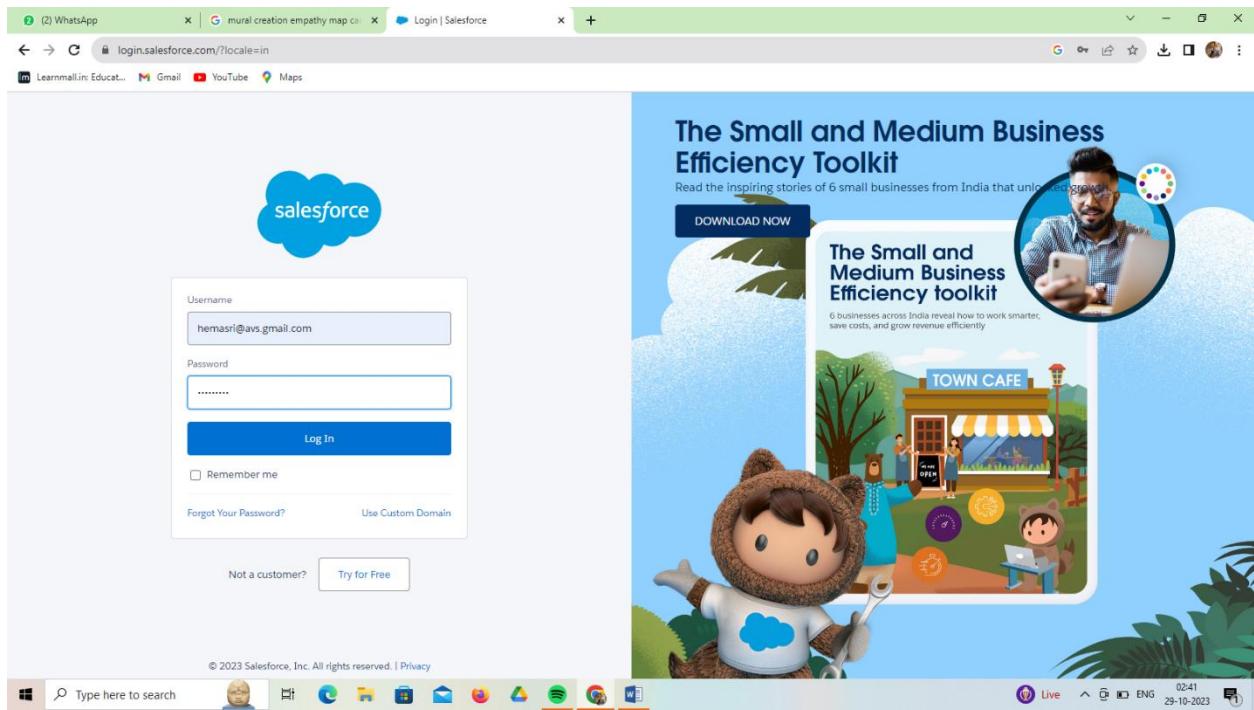
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.

The screenshot shows the Salesforce Developers website. At the top, there's a navigation bar with links for Products, Industries, Customers, Learning, Support, Company, and Salesforce+. A search bar says "Search Developers". Below the navigation, a main banner features a large blue circular graphic with a white bear face inside, surrounded by clouds. The text "Get release-ready today!" is overlaid on the graphic. Below the banner, a section titled "Latest Developer News" is visible, along with a Windows taskbar at the bottom showing various application icons.

The screenshot shows the "Explore Lightning Platform" landing page. It features a large image of a computer monitor displaying the Salesforce Lightning Experience interface. To the right, there's a sidebar with the text "Explore Lightning Platform, the fastest way to create enterprise cloud apps". Above the sidebar, the Salesforce lightning platform logo is displayed. Below the logo, the text "Get your very own Developer Edition" and "A full-featured copy of Lightning Platform, for FREE." is shown. On the right side, there's a form for signing up, with fields for Name (First and Last), Email, Role (Your job role), Company (Company Name), and Country.

## Account Activation

Activation tracks information about devices from which users have verified their identity.



## 2.2 Object Creation

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. Custom objects: Students, Teachers, Parents, Others.

### Create the Consultants Object

The image shows two screenshots of the Salesforce interface. The top screenshot displays the 'Object Manager' page, showing a list of standard objects like Account, Activity, and Asset. The bottom screenshot shows the 'New Custom Object' creation page for a 'Student' object.

**Object Manager Screenshot:**

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		
Asset Relationship	AssetRelationship	Standard Object		
Asset State Period	AssetStatePeriod	Standard Object		

**New Custom Object Screenshot:**

**Custom Object Information:**

- Label: Student
- Plural Label: Students
- Example: Account

**Object Name:**

- Object Name: Student
- Example: Account

**Record Name Label and Format:**

- Record Name: Student Name
- Example: Account Name
- Data Type: Text

## Create the Retailers Object

The screenshot shows the 'Edit Custom Object' page for 'MySchool'. The 'Custom Object Information' section is visible, showing the label 'MySchool' and plural label 'MySchools'. The 'Object Name' field is set to 'MySchool'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the radio button for 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section shows the record name 'School Name' and example 'Account Name'. The 'Data Type' is set to 'Text'. The page includes a sidebar with various links like Home, Chatter, Libraries, Content, Subscriptions, informations, schools, customers, banks, and more.

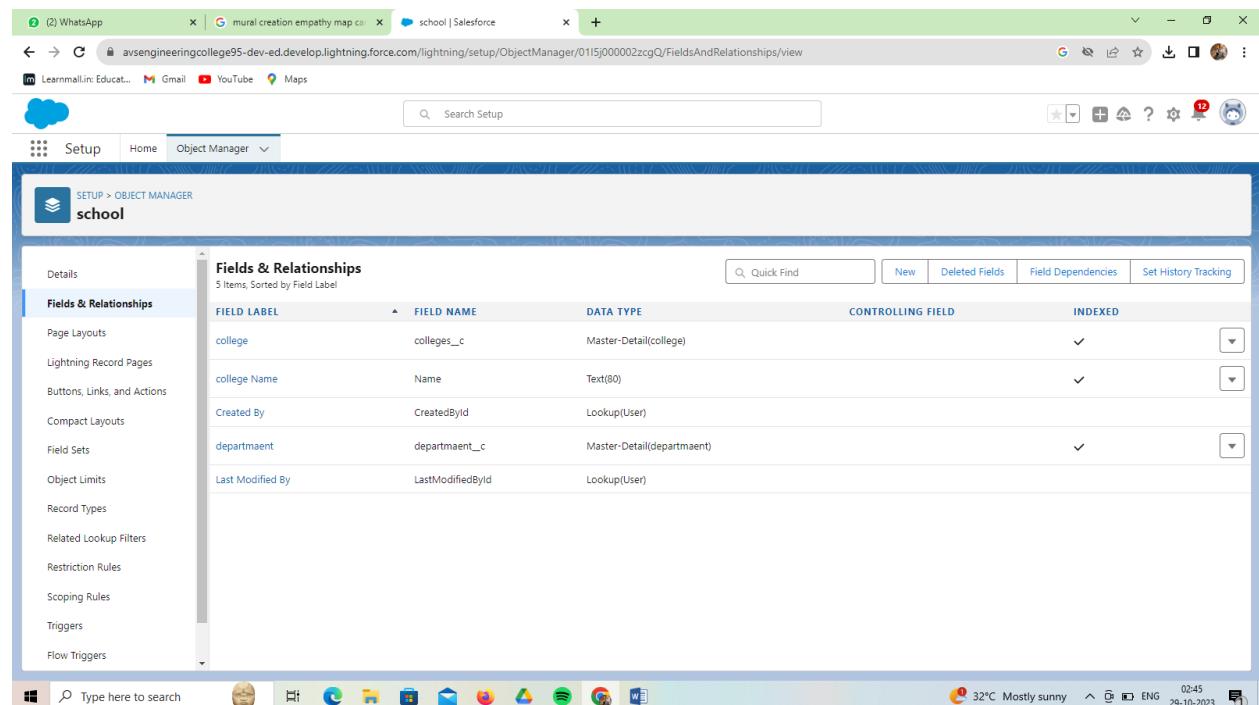
## Create the Others Object

The screenshot shows the 'Edit Custom Object' page for 'Parent'. The 'Custom Object Information' section is visible, showing the label 'Parent' and plural label 'Parents'. The 'Object Name' field is set to 'Parent'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the radio button for 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section shows the record name 'Parent Name' and example 'Account Name'. The 'Data Type' is set to 'Text'. The page includes a sidebar with various links like Home, Chatter, Libraries, Content, Subscriptions, informations, schools, customers, banks, and more.

## 2.3 Fields and Relationship

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

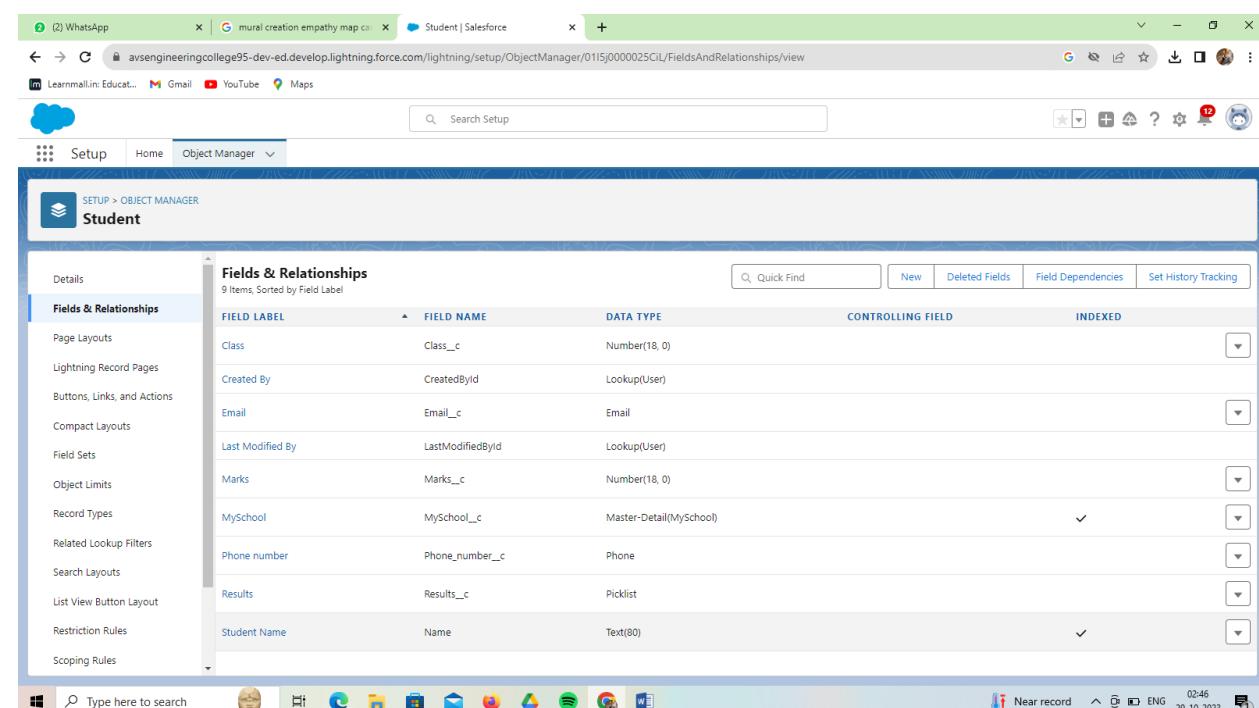
### Fields in School Objects



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 content area displays a table titled 'Fields & Relationships' with 5 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	colleges_c	Master-Detail(college)		✓
college Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		✓
departmaent	departmaent_c	Master-Detail(departmaent)		✓
Last Modified By	LastModifiedById	Lookup(User)		

### Fields in Student Objects



The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar lists various setup options. The main content area displays a table titled 'Fields & Relationships' with 9 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks_c	Number(18, 0)		
MySchool	MySchool_c	Master-Detail(MySchool)		✓
Phone number	Phone_number_c	Phone		
Results	Results_c	Picklist		
Student Name	Name	Text(80)		✓

## Fields in Parent Objects

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, and Field Sets. The main area displays a table titled 'Fields & Relationships' with 6 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows show fields such as Created By (CreatedBy), Last Modified By (LastModifiedBy), Owner (OwnerId), Parent Address (Parent\_Address\_\_c), Parent Name (Name), and Parent Number (Parent\_Number\_\_c). The 'INDEXED' column contains checkmarks for several fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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		

## Fields in Others Objects

The screenshot shows the Salesforce Object Manager interface for the 'Others' object. The left sidebar lists various setup options. The main area displays a table titled 'Fields & Relationships' with 6 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows show fields such as Coupon (Coupon\_\_c), Created By (CreatedBy), Employee (Employee\_\_c), Last Modified By (LastModifiedBy), Other Name (Name), and Owner (OwnerId). The 'INDEXED' column contains checkmarks for several fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon__c	Text(15)		
Created By	CreatedBy	Lookup(User)		
Employee	Employee__c	Picklist		
Last Modified By	LastModifiedBy	Lookup(User)		
Other Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

## 2.4 Page Layouts

In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

### Select the School Layout page layout

The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Page Layouts' section for the 'MySchool' object. There is one item listed: 'MySchool Layout'. The details show it was created by 'Hemarsi S' on 27/10/2023 at 3:46 pm, and last modified by 'Hemarsi S' on 28/10/2023 at 12:05 pm. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The browser toolbar at the bottom shows various icons and the date/time as 29-10-2023.

The screenshot shows the Salesforce Object Manager interface with the 'consultant' object selected. The left sidebar is collapsed, and the main area displays the 'Page Layouts' section for the 'consultant' object. There is one item listed: 'consultant Layout'. The details show it was created by 'Hemarsi S' on 27/10/2023 at 3:46 pm, and last modified by 'Hemarsi S' on 28/10/2023 at 12:05 pm. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main content area shows the layout editor with sections for 'Fields' (containing 'consultant\_number', 'consultant\_name', 'consultant\_address', 'consultant\_email', 'consultant\_id', 'Delivery type', 'Last Modified By', 'Payment', and 'products'), 'Highlights Panel' (with a note to customize), 'Quick Actions in the Salesforce Classic Publisher' (with a note to override the global publisher layout), and 'Salesforce Mobile and Lightning Experience Actions' (with a note to override the predefined actions). The browser toolbar at the bottom shows various icons and the date/time as 29-10-2023.

## 2.5 The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app.

### To create a lightning app page

The screenshot shows the Salesforce Setup Home page. On the left, the sidebar is open with the 'App Manager' option selected under the 'Apps' category. The main content area displays three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' which lists 'Ajmal Akram' and 'SFDC\_DeveloperConsole'. The bottom of the screen shows the standard Windows taskbar with various icons.

The screenshot shows the Lightning Experience App Manager page. The sidebar is identical to the previous screenshot, with 'App Manager' selected. The main content area displays a table of 22 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. Some rows are partially cut off at the bottom. The bottom of the screen shows the standard Windows taskbar with various icons.

App Name	Developer Name	Description	Last Modified Date	App T...	Visib...
All Tabs	AllTabSet		01/10/2023, 6:39 am	Classic	Visible
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	01/10/2023, 6:39 am	Classic	Visible
App Launcher	AppLauncher	App Launcher tabs	01/10/2023, 6:39 am	Classic	Visible
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	01/10/2023, 6:42 am	Lightning	Visible
Community	Community	Salesforce CRM Communities	01/10/2023, 6:39 am	Classic	Visible
Content	Content	Salesforce CRM Content	01/10/2023, 6:39 am	Classic	Visible
Cosmetic store management	Cosmetic_store		17/10/2023, 11:50 am	Lightning	Visible
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	01/10/2023, 6:39 am	Lightning	Visible
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	01/10/2023, 6:39 am	Lightning	Visible
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	01/10/2023, 6:39 am	Lightning	Visible
Marketing	Marketing	Best-in-class on-demand marketing automation	01/10/2023, 6:39 am	Classic	Visible
Platform	Platform	The fundamental Lightning Platform	01/10/2023, 6:39 am	Classic	Visible
Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	Visible
Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	Visible
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	Visible

Salesforce Navigation

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name: My school

\* Developer Name: My\_school

Description: Enter a description...

App Branding

Image:  Primary Color Hex Value: #0070D2

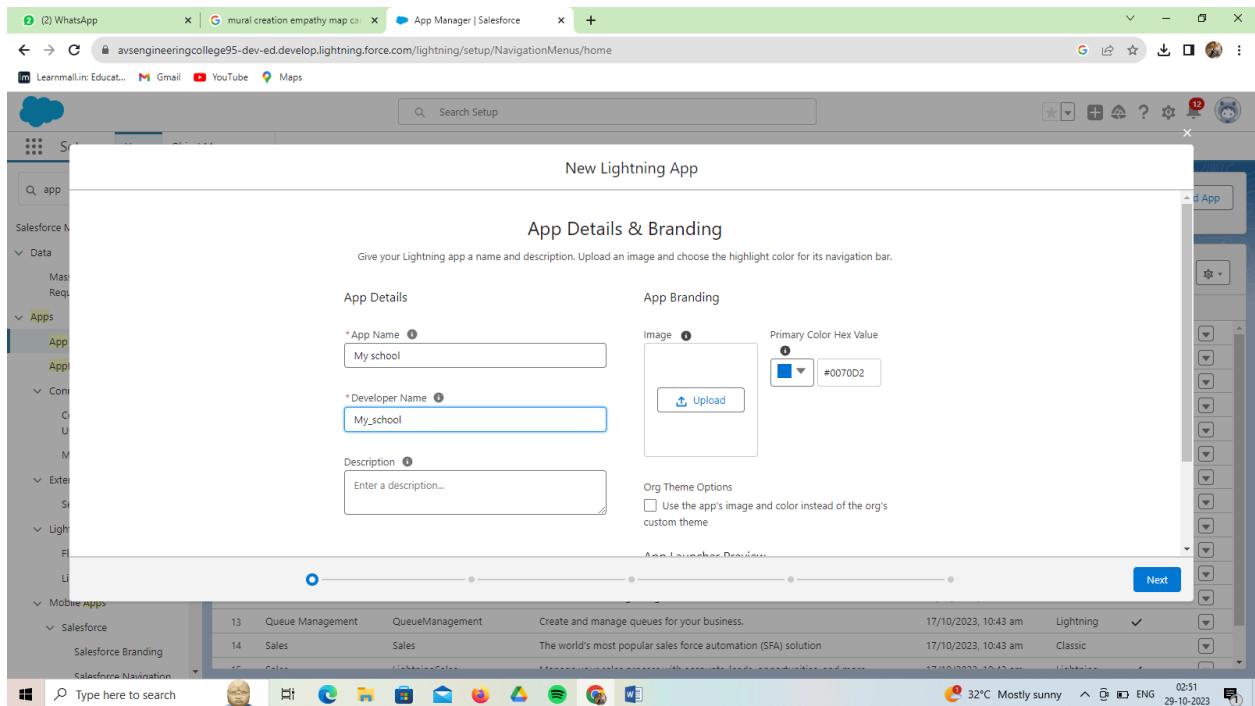
Org Theme Options:  Use the app's image and color instead of the org's custom theme

App Launcher Preview: [Circular progress bar]

Next

Type here to search

32°C Mostly sunny 02:51 ENG 29-10-2023



Salesforce Navigation

New Lightning App

App Options

Navigation and Form Factor

\* Navigation Style: Standard navigation (selected)

\* Supported Form Factors: Desktop and phone (selected)

Setup and Personalization

Setup Experience: Setup (full set of Setup options) (selected)

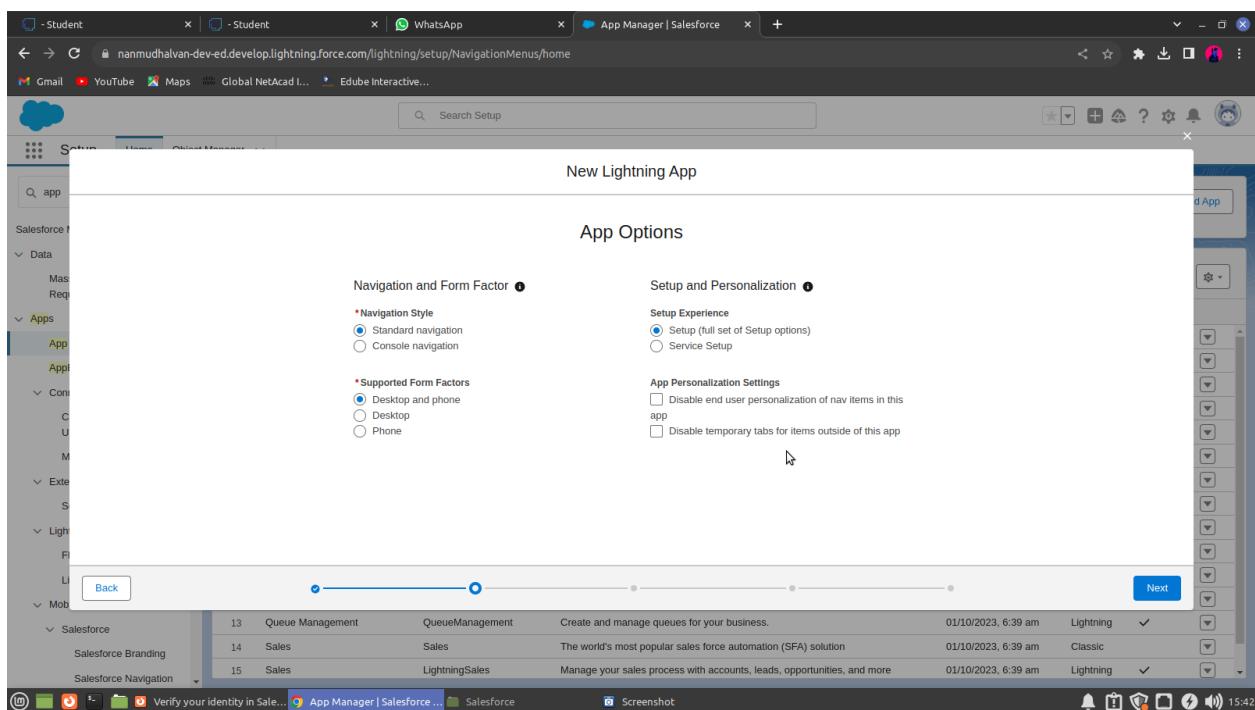
App Personalization Settings

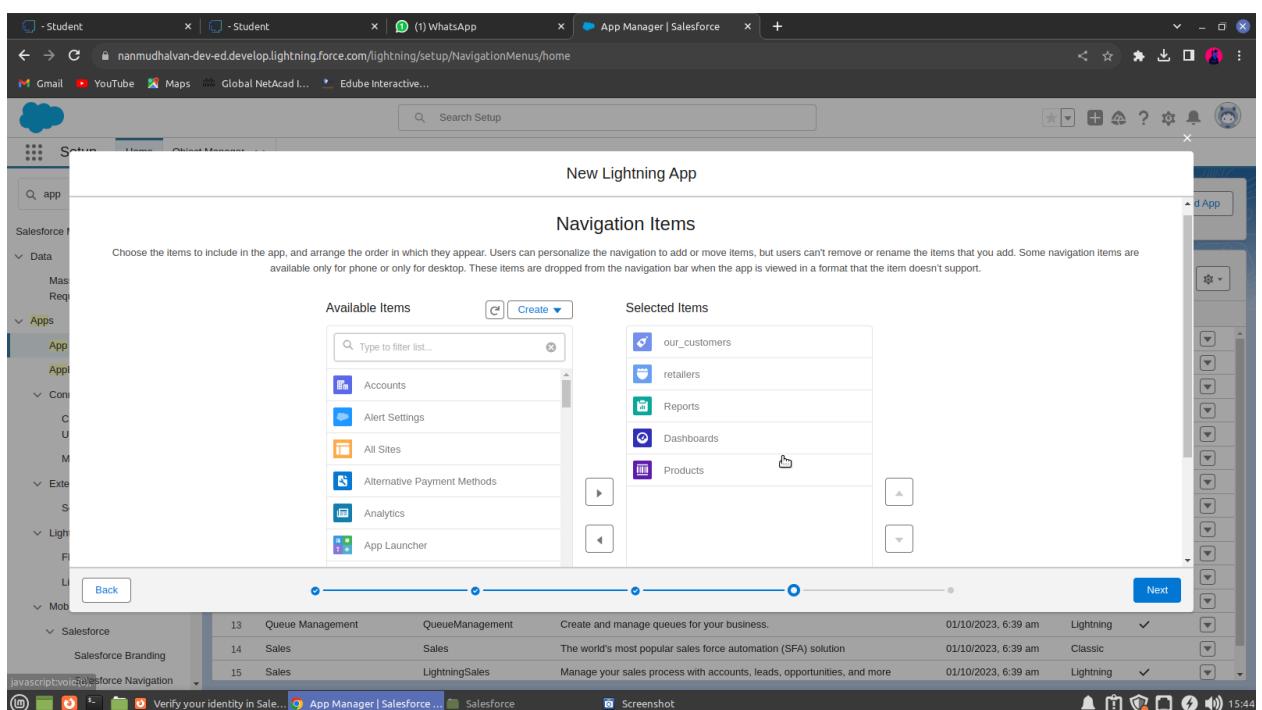
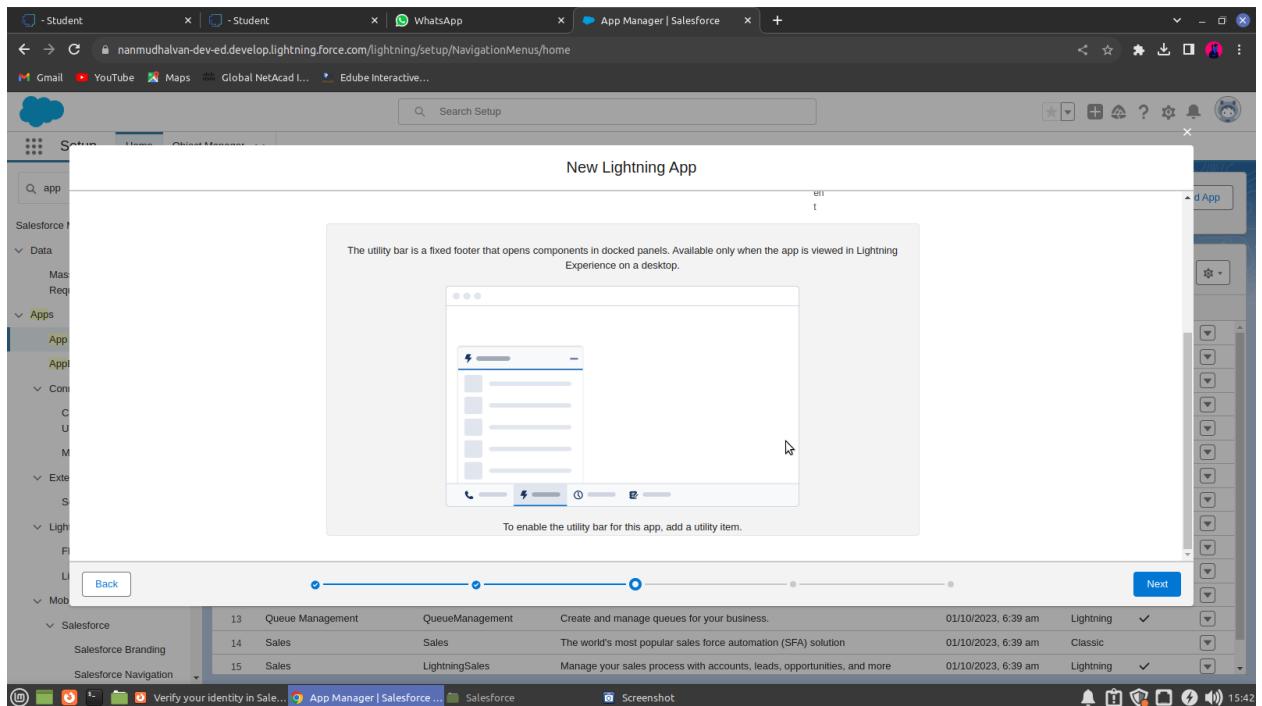
Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app

Back Next

Verify your identity in Sales... App Manager | Salesforce... Screenshot





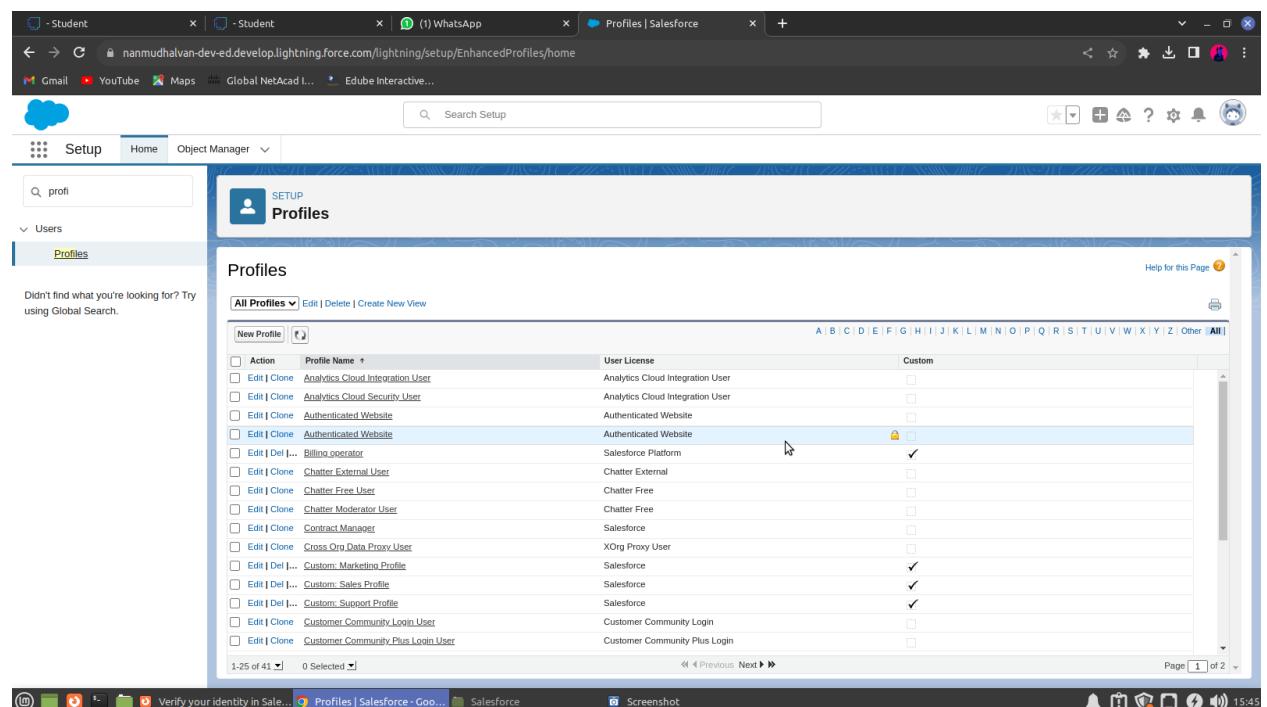
# CHAPTER-3

## USERS & DATA SECURITY

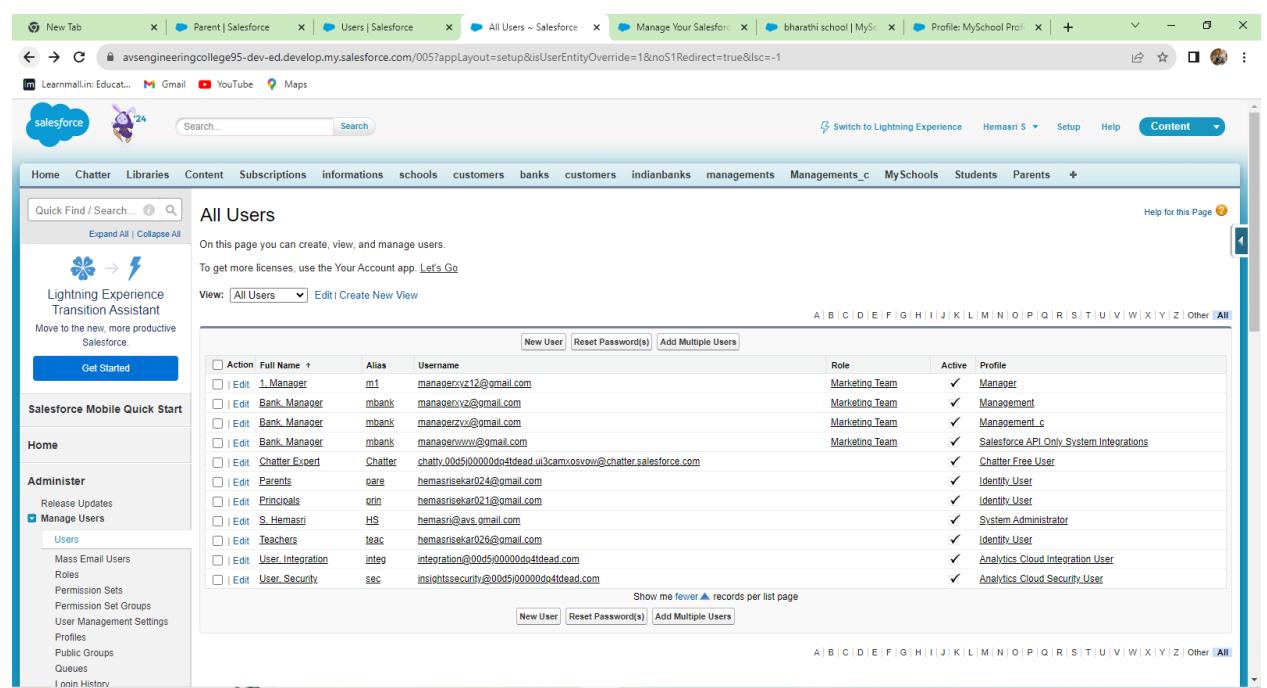
### 3.1 Profile

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.

### Creating a Profiles

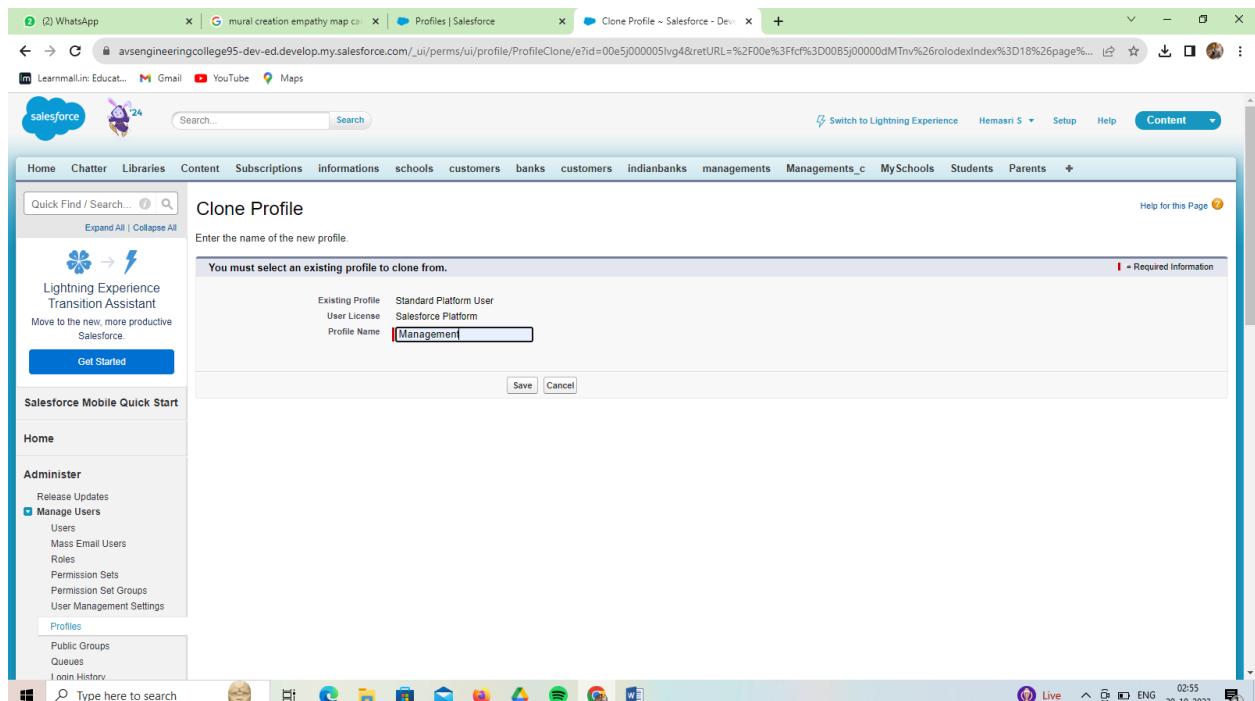


The screenshot shows the Salesforce Setup interface with the search bar set to "prof". The main area displays a list of profiles under the heading "Profiles". The list includes various standard and custom profiles such as Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Salesforce Platform, Chatter External, Chatter Free, Contract Manager, XOrg Proxy User, Salesforce, Custom: Marketing Profile, Custom: Sales Profile, Customer Community Login, and Customer Community Plus Login. The "Salesforce" profile is selected, indicated by a blue highlight. The interface includes a navigation bar at the top and a footer with browser tabs and system status.

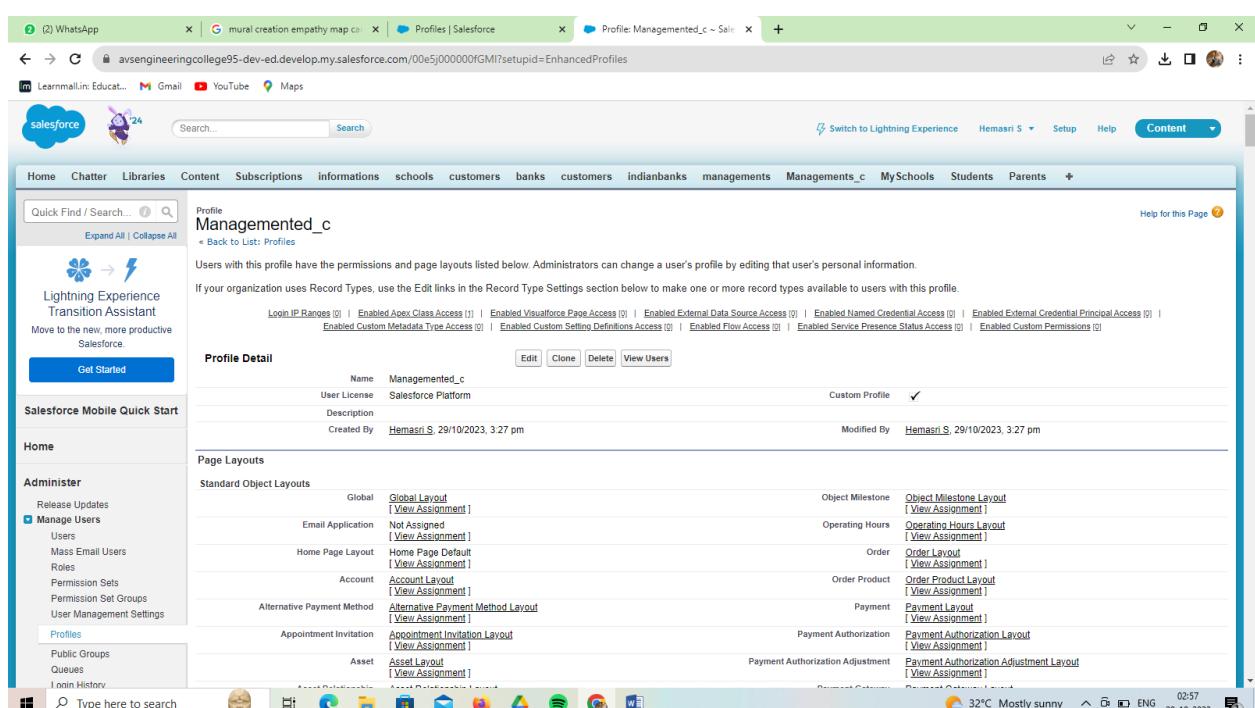


The screenshot shows the Salesforce classic interface with the search bar set to "User". The main area displays a list of users under the heading "All Users". The list includes users such as m1, mbank, managerxyz, managerwww, chatter, care, principals, HS, tsat, integration, and sec. The "managerxyz" user is selected, indicated by a blue highlight. The interface includes a navigation bar at the top and a footer with browser tabs and system status.

## To create a new profile (Store Supervisor)



The screenshot shows the 'Clone Profile' page in the Salesforce classic interface. The user is cloning the 'Management' profile. The 'Profile Name' field is filled with 'Management'. The 'Save' button is visible at the bottom.



The screenshot shows the 'Profile: Managemented\_c' page in the Salesforce classic interface. The profile details are listed, including its name, license, and creation date. The 'Edit' button is visible at the top right of the profile detail section.

Salesforce Setup - Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhB%2Fe%3FretURL%3D%252F00e5h0000049lhB%253FappLayout%...

Gmail YouTube Maps Global NetAcad I... Edude Interactive...

Search Setup

Setup Home Object Manager

Search profi

Users Profiles

Profiles

Profile Edit

Name: Store Supervisor

User License: Salesforce

Description:

Custom Profile

Custom App Settings

All Tabs (standard\_AllTabSet) Visible Default

Sales (standard\_LightningSales) Visible Default

Sales (standard\_Sales)

Sales Console (standard\_LightningSalesConsole) Visible Default

Salesforce Chatter (standard\_Chatter) Visible Default

Salesforce Scheduler Setup (standard\_LightningScheduler) Visible Default

Sample Console (standard\_ServiceConsole) Visible Default

Service (standard\_Service) Visible Default

Service Console (standard\_LightningService) Visible Default

Site.com (standard\_Sites) Visible Default

Subscription Management (standard\_RevenueCloudConsole) Visible Default

WNL (standard\_WNL) Visible Default

Custom Object Permissions

Basic Access Read Create Edit Delete View All Modify All

consultants Read Create Edit Delete View All Modify All

Favourites Read Create Edit Delete View All Modify All

Fragrance products Read Create Edit Delete View All Modify All

Inventories Read Create Edit Delete View All Modify All

Others Read Create Edit Delete View All Modify All

our\_customers Read Create Edit Delete View All Modify All

Properties Read Create Edit Delete View All Modify All

retailers Read Create Edit Delete View All Modify All

Skincare products Read Create Edit Delete View All Modify All

Students Read Create Edit Delete View All Modify All

Session Settings

Verify your identity in Sales... Profiles | Salesforce - Go... Salesforce Screenshot

Salesforce Setup - Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhB%2Fe%3FretURL%3D%252F00e5h0000049lhB%253FappLayout%...

Gmail YouTube Maps Global NetAcad I... Edude Interactive...

Search Setup

Setup Home Object Manager

Search profi

Users Profiles

Profiles

Finance Transactions

Gateway Provider Payment Method Types

Ideas

Images

Incidents

Individuals

Invoices

Leads

Web Cart Documents

Work Orders

Work Plans

Work Plan Templates

Work Step Templates

Work Types

Work Type Groups

Custom Object Permissions

Basic Access Read Create Edit Delete View All Modify All

consultants Read Create Edit Delete View All Modify All

Favourites Read Create Edit Delete View All Modify All

Fragrance products Read Create Edit Delete View All Modify All

Inventories Read Create Edit Delete View All Modify All

Others Read Create Edit Delete View All Modify All

our\_customers Read Create Edit Delete View All Modify All

Properties Read Create Edit Delete View All Modify All

retailers Read Create Edit Delete View All Modify All

Skincare products Read Create Edit Delete View All Modify All

Students Read Create Edit Delete View All Modify All

Session Settings

Verify your identity in Sales... Profiles | Salesforce - Go... Salesforce Screenshot

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The top navigation bar includes tabs for Home, Object Manager, and Search Setup. On the left, there's a sidebar with a search bar and sections for Users and Profiles. A message at the bottom of the sidebar says, "Didn't find what you're looking for? Try using Global Search." The main content area is titled 'SETUP Profiles'. It features a grid of profiles categorized by product type. The 'Session Settings' section includes fields for 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' ('None'). The 'Password Policies' section contains various configuration options such as password expiration, complexity requirements, and lockout policies.

## To create a new profile (management Operator)

The screenshot shows the 'Clone Profile' page in the Salesforce Setup interface. The top navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'Clone Profile' and contains a message: 'Enter the name of the new profile.' Below this is a warning: 'You must select an existing profile to clone from.' A required field indicator (red asterisk) is shown next to the 'Profile Name' field. The 'Existing Profile' dropdown is set to 'Standard Platform User', 'User License' is 'Salesforce Platform', and the 'Profile Name' field contains 'Billing operator'. At the bottom of the page are 'Save' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the Profiles page for the 'Billing operator' profile.

**Profile Detail:**

- Name: Billing operator
- User License: Salesforce Platform
- Description:
- Created By: Aimal Akram, 17/10/2023, 11:57 am
- Modified By: Aimal Akram, 17/10/2023, 1:23 pm

**Page Layouts:**

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned	Operating Hours
Home Page Layout	Home Page Default	Order
Account	Account Layout	Order Product
Alternative Payment Method	Alternative Payment Method Layout	Payment
Appointment Invitation	Appointment Invitation Layout	Payment Authorization
Asset	Asset Layout	Payment Authorization Adjustment

**Permissions:**

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

Screenshot of the Salesforce Setup interface showing the Profile Edit screen for the 'Billing operator' profile.

**Profile Edit:**

**Profile Details:**

- Name: Billing operator
- User License: Salesforce Platform
- Description:

**Custom App Settings:**

Visible	Default
<input type="checkbox"/>	<input checked="" type="radio"/>
<input type="checkbox"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/>	<input type="radio"/>

**Service Provider Access:**

**Tab Settings:**

Overwrite users' personal tab customizations

**Standard Tab Settings:**

Salesforce Setup - Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhG%2Fe%3FretURL%3D%252F00e5h0000049lhG%253FappLayout%...

Gmail YouTube Maps Global NetAcad I... Edude Interactive...

Search Setup

Setup Home Object Manager

Search: profi

Users Profiles

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

## Profiles

	Basic Access	Create	Edit	Delete	Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
consultants	<input checked="" type="checkbox"/>					
Favourites	<input type="checkbox"/>					
Fragrance products	<input type="checkbox"/>					
Inventories	<input type="checkbox"/>					
Others	<input type="checkbox"/>					
our_customers	<input checked="" type="checkbox"/>					
Properties	<input type="checkbox"/>					
retailers	<input checked="" type="checkbox"/>					
Skincare products	<input type="checkbox"/>					
Students	<input type="checkbox"/>					

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obsolete secret answer for password resets:

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot

15:50

Salesforce Setup - Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhG%2Fe%3FretURL%3D%252F00e5h0000049lhG%253FappLayout%...

Gmail YouTube Maps Global NetAcad I... Edude Interactive...

Search Setup

Setup Home Object Manager

Search: profi

Users Profiles

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

## Profiles

	Basic Access	Create	Edit	Delete	Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Fragrance products	<input type="checkbox"/>					
Inventories	<input type="checkbox"/>					
Others	<input type="checkbox"/>					
retailers	<input checked="" type="checkbox"/>					
Skincare products	<input type="checkbox"/>					
Students	<input type="checkbox"/>					

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obsolete secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save Save & New Cancel

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot

15:50

## 3.2 Setup Roles

Salesforce roles are record-level access controls that define what data a user can see in Salesforce.

### Creating a Role

The screenshot shows the Salesforce Setup Roles page. On the left, a sidebar navigation includes 'Users' (selected), 'Roles' (highlighted in blue), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts', 'Contact Roles on Opportunities', 'Service', 'Case Teams', and 'Contact Roles on Cases'), and a search bar. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy' diagram. The hierarchy is as follows:

- Executive Staff**: CEO, President, CFO, VP, Sales. Description: \* View & edit data, roll up forecasts, & generate reports for all users below or at same level of other Executive Staff.
- Western Sales Director**: Director of Wt Sales. Description: \* View & edit data, roll up forecasts, & generate reports for all users below or at same level.
- Eastern Sales Director**: Director of E Sales. Description: \* View & edit data, roll up forecasts, & generate reports for all users below or at same level.
- International Sales Director**: Director of int'l Sales. Description: \* View & edit data, roll up forecasts, & generate reports for all users below or at same level.  
\* Can't access data of users above or at same level.
- Western Sales Rep**: CA Sales Rep, QR Sales Rep. Description: \* View & edit data, roll up forecasts, & generate reports for own records only.  
\* Can't access data of users above or at same level.
- Eastern Sales Rep**: NY Sales Rep, MA Sales Rep. Description: \* View & edit data, roll up forecasts, & generate reports for own records only.  
\* Can't access data of users above or at same level.
- International Sales Rep**: Asian Sales Rep, European Sales Rep. Description: \* View & edit data, roll up forecasts, & generate reports for own records only.  
\* Can't access data of users above or at same level.

At the bottom right of the main content area is a 'Help for this Page' link and a 'Don't show this page again' checkbox. The browser status bar at the bottom indicates 'Verify your identity in Sales...' and 'Roles | Salesforce - Google...'. The taskbar at the very bottom shows various application icons and the date '15:51'.

The screenshot shows the Salesforce Setup Permission Sets page. The sidebar navigation includes 'Users' (selected), 'Permission Set Groups' (disabled), 'Permission Sets' (highlighted in blue), and 'Custom Code'. The main content area is titled 'Clone: Salesmanager' and contains a form for 'Enter permission set information'. The fields are as follows:

Label	<input type="text" value="Salesmanager"/>
API Name	<input type="text" value="Salesmanager"/>
Description	<input type="text" value=""/>
Session Activation Required	<input type="checkbox"/>
License	<input type="text"/>

At the bottom of the form are 'Save' and 'Cancel' buttons. The browser status bar at the bottom indicates 'Recently Viewed | management...' and 'avsgengineeringcollege-5d-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet.apexp%3Fid%3D0P5J0000096Af%26setupid%3DPermSets%26retURL%3D%252F0P5%253Frct%253D0085J00000dMVi%2526rolIndex%253D1%2526sotp%253Dp1%26sotp%3Dp1%27'. The taskbar at the very bottom shows various application icons and the date '29-10-2023'.

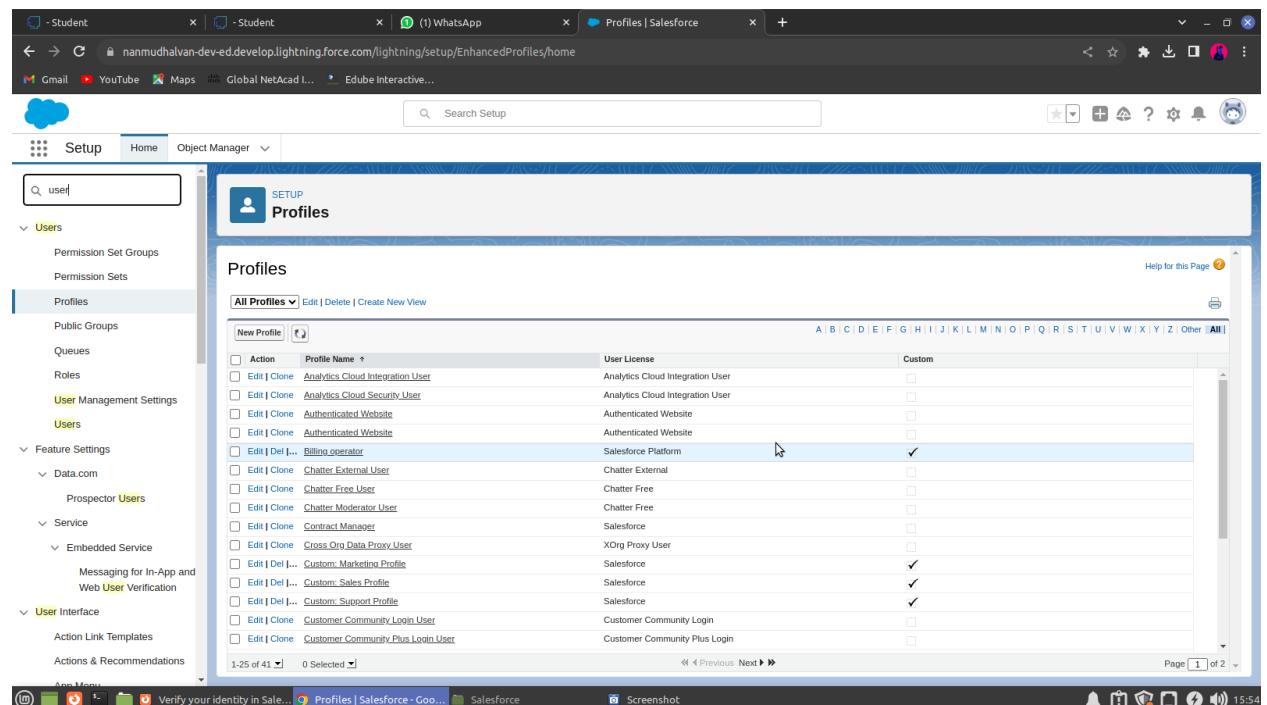
The screenshot shows the 'New Custom Field' configuration page in the Salesforce Setup. The title bar says 'MySchool New Custom Field'. The main section is titled 'Step 2. Enter the details' and includes fields for 'Field Label' (set to 'Highest Marks'), 'Field Name' (set to 'Highest Marks'), 'Description' (empty), and 'Help Text' (empty). A checkbox 'Add this field to existing custom report types that contain this entity' is checked. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

The screenshot shows the 'Creating the Role Hierarchy' page in the Salesforce Setup. The title bar says 'Roles | Salesforce'. The left sidebar shows navigation paths like 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', 'Case Teams', and 'Contact Roles on Cases'. The main area displays a tree view of role hierarchy under 'Your Organization's Role Hierarchy'. Root roles include 'Nan mudhalvan', 'CEO', 'CFO', 'COO', 'Store Head', 'Billing Operator', 'SVP, Customer Service & Support', 'Customer Support, International', 'Customer Support, North America', 'Installation & Repair Services', and 'SVP, Human Resources'. Each role has 'Edit', 'Del', and 'Assign' buttons. A search bar 'Search Setup' is at the top, and a toolbar with various icons is at the bottom.

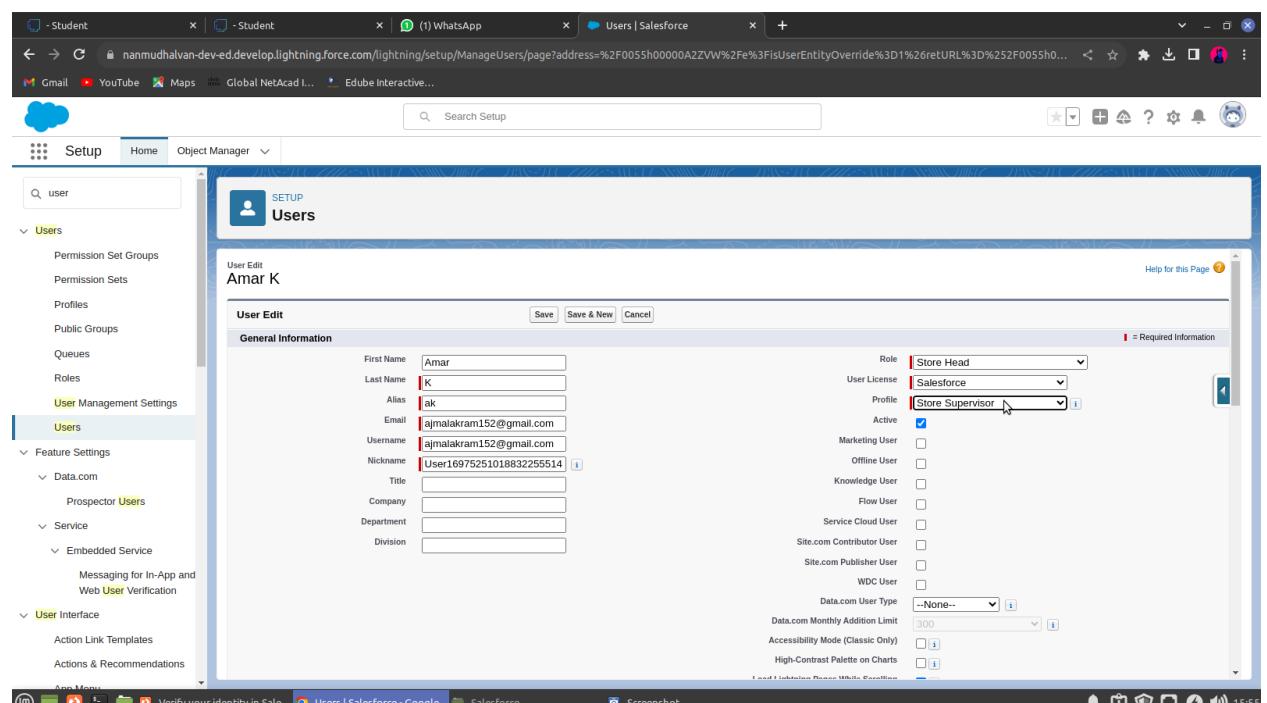
## 3.3 Users

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

## Creating A User



The screenshot shows the Salesforce Setup interface with the search bar set to "use". The left sidebar is expanded, showing categories like Users, Feature Settings, and User Interface. The main content area is titled "Profiles" and displays a list of profiles. The "All Profiles" dropdown is selected. The list includes various profiles such as "Analytics Cloud Integration User", "Authenticated Website", "Billing operator", "Chatter External User", "Chatter Free User", "Chatter Moderator User", "Contract Manager", "Cross Org Data Proxy User", "Custom: Marketing Profile", "Custom: Sales Profile", "Custom: Support Profile", "Customer Community Login User", and "Customer Community Plus Login User". The "Salesforce Platform" filter is applied, and the "Active" checkbox is checked. The interface includes a navigation bar with links like "Edit | Delete" and "Create New View".



The screenshot shows the Salesforce Setup interface with the search bar set to "user". The left sidebar is expanded, showing categories like Users, Feature Settings, and User Interface. The main content area is titled "Users" and displays a "User Edit" form for a user named "Amar K". The "General Information" section contains fields for First Name (Amar), Last Name (K), Alias (ak), Email (ajmalakram152@gmail.com), Username (ajmalakram152@gmail.com), Nickname (User16975251018832255514), Title, Company, Department, and Division. To the right of these fields are dropdown menus for Role (Store Head), User License (Salesforce), and Profile (Store Supervisor). Other checkboxes include Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (-None-). The bottom of the page shows standard browser controls and a status bar indicating "Verify your identity in Sale...".

## Creating another Users

The screenshot shows the 'User Edit' page in the Salesforce setup interface. A sidebar on the left contains links for Lightning Experience Transition Assistant, Salesforce Mobile Quick Start, Home, Administer (with Manage Users selected), and various system settings like Release Updates, Mass Email Users, Roles, Permission Sets, etc. The main form is titled 'New User' and is divided into sections: General Information, Profile & Permissions, and Advanced Settings. In the 'General Information' section, fields include First Name (Manager), Last Name (Bank), Alias (mbank), Email (hemarsi@avsgmail.com), Username (hemarsi@avsgmail.com), Nickname (User1698559760068390410), Title (Blank), Company (Blank), Department (Blank), Division (Blank), Role (Marketing Team), User License (Salesforce), Profile (Standard User), and Active (checked). The 'Advanced Settings' section includes checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), Debug Mode, and Quick Access Menu. At the bottom are Save, Save & New, and Cancel buttons.

The screenshot shows the 'Users' page in the Salesforce setup interface. The left sidebar lists categories like Users, Feature Settings, Service, and User Interface. Under 'Users', 'Manage Users' is selected. The main area displays a table with columns for Name, Email, and Status. The first row shows a user named 'Student' with an email of 'student@avsgmail.com'. Below the table are sections for Single Sign On Information, Locale Settings (Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English), Approver Settings (Delegated Approver: Blank, Manager: Blank, Receive Approval Request Emails: Only if I am an approver), and a checkbox for Generate new password and notify user immediately. At the bottom are Save, Save & New, and Cancel buttons.

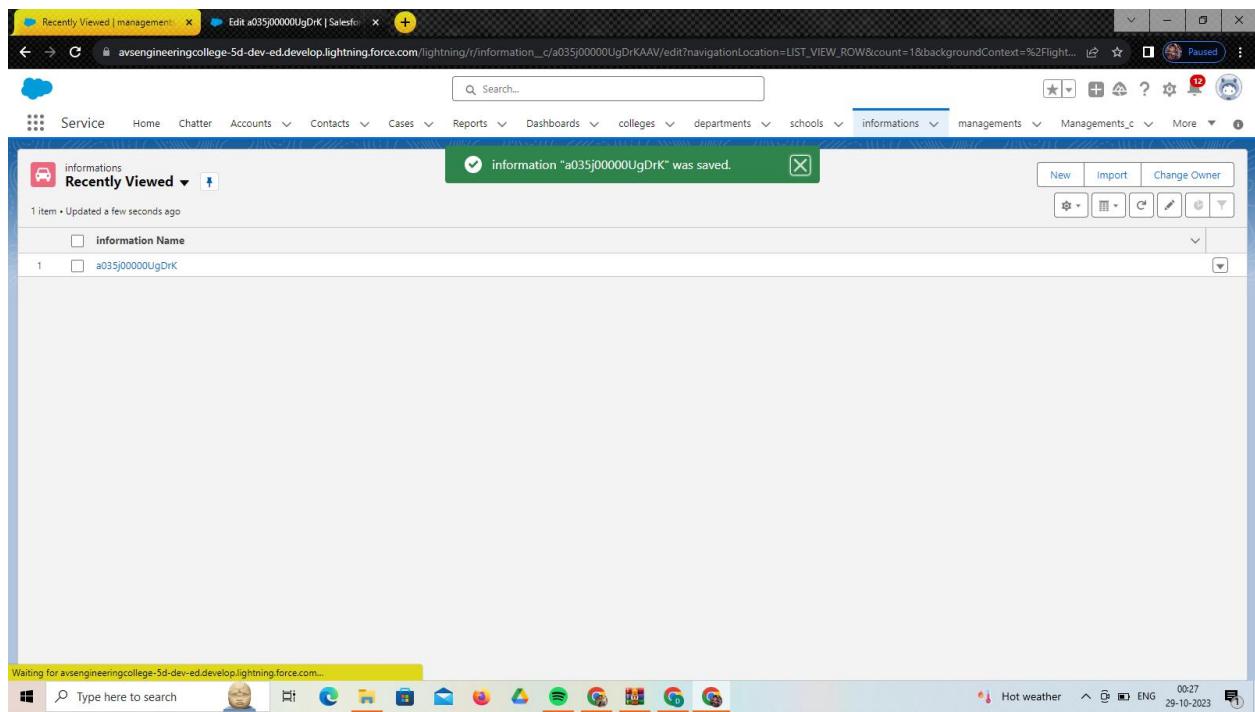
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Akram, Aimal	Akira	gmatakram152@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chat00d5h000000000y47eac.op5huzxbqk@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	K. Amer	ak	gmatakram152@gmail.com	Store Head	<input checked="" type="checkbox"/>	Store Supervisor
<input type="checkbox"/> Edit	Teddy, John	jedi	psychoe1730@gmail.com	Billing Operator	<input checked="" type="checkbox"/>	Billing operator
<input type="checkbox"/> Edit	User, Integration	Integ	integration@00d5h000008nv47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightsecurity@00d5h000008ny47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## 3.4 User Adoption & Approval

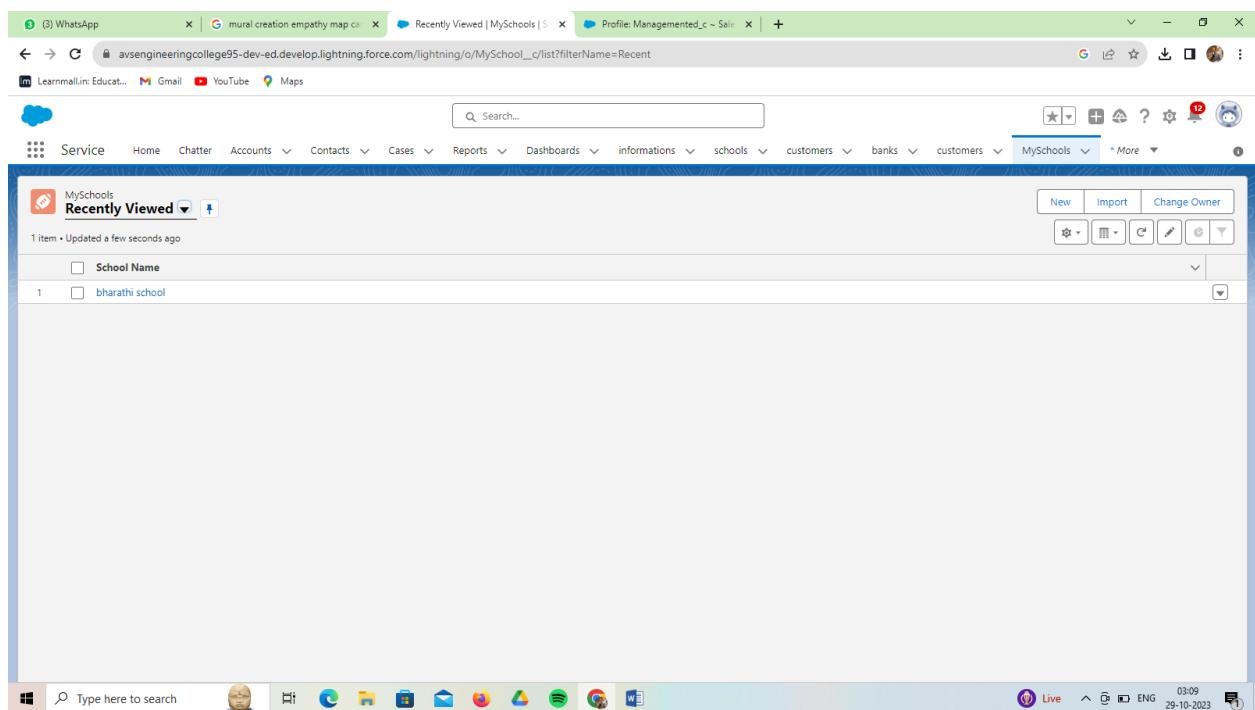
It is the interaction with database and their records.

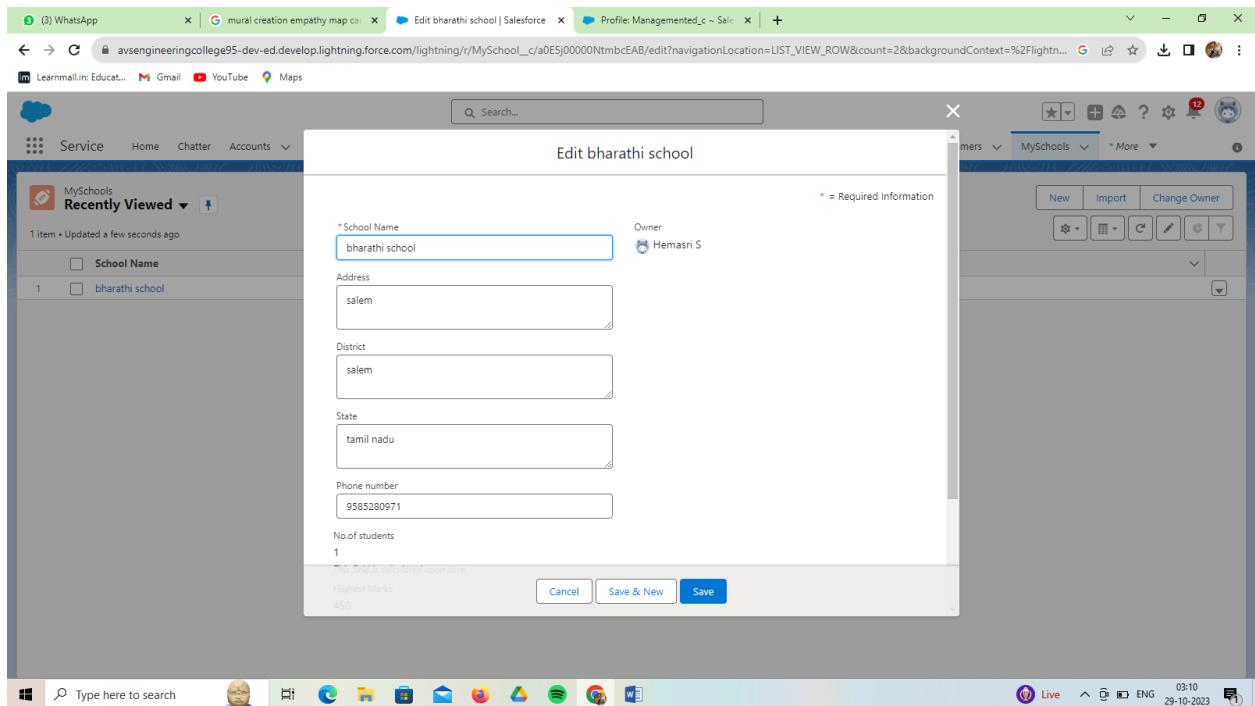
## Create Our Customer Record

Category	Item	Description	File Type	Orchestration Runs	Salesforce Scheduler Setup Assistant
Accounts	Communication Subscription Channel Ty...	Files			
Alert Settings	Communication Subscription Consents	Finance Balance Snapshots		Orchestration Work Items	Scorecards
Alternative Payment Methods	Communication Subscription Timings	Finance Transactions		Orders	Security Policies
Analytics	Communication Subscriptions	Forecasts		Org Metrics	Sellers

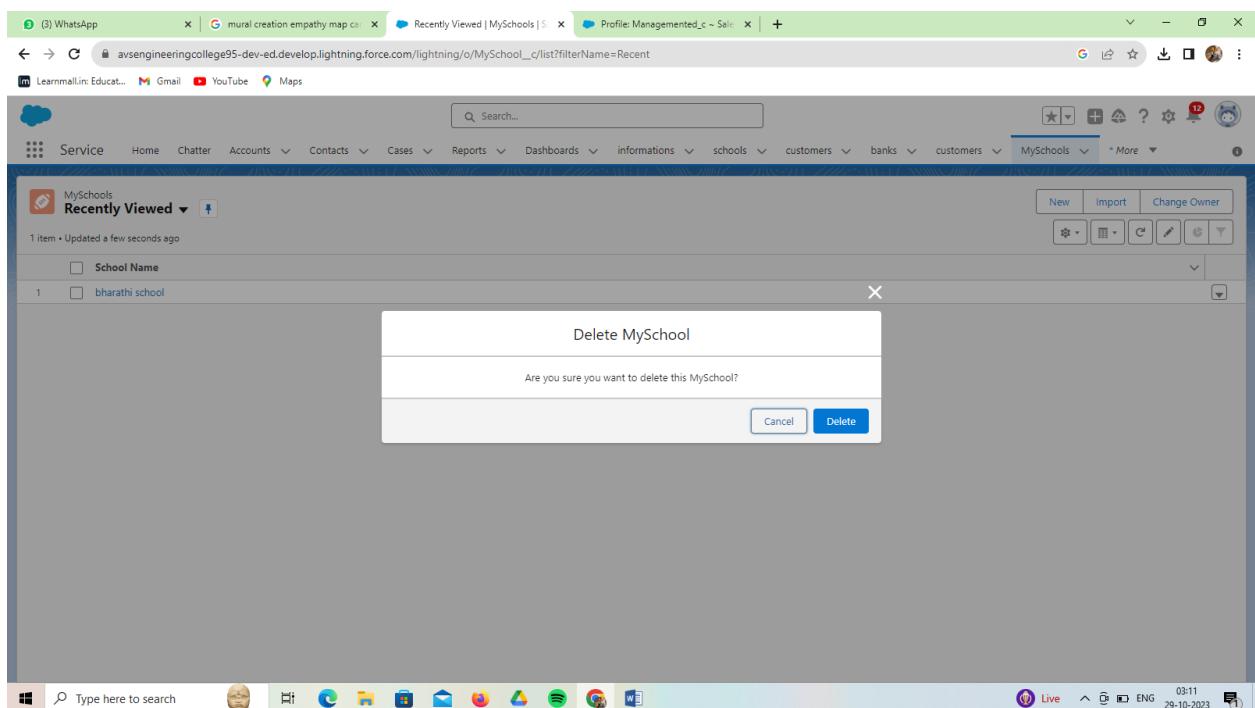


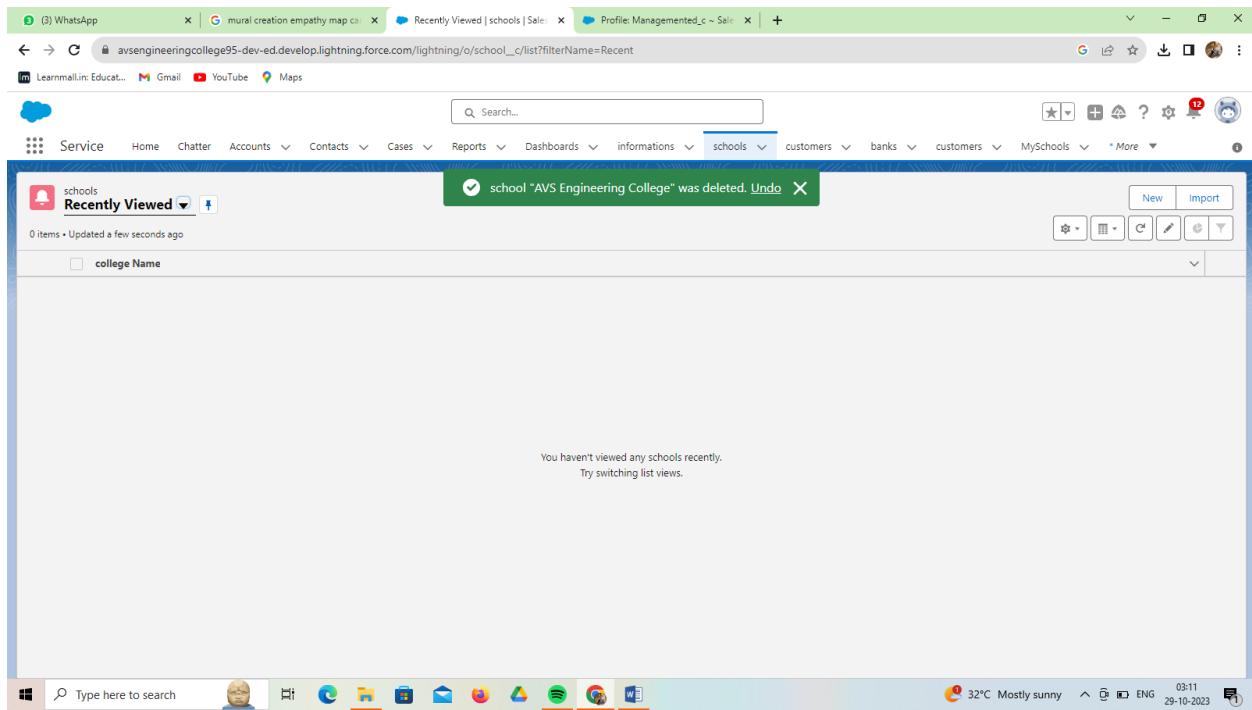
## View Record (Our school)





## Delete Record (Our school)





## Data Import

The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization.

Before you import your data...

You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. View a list of Salesforce data fields.

**Don't import too many records at once**  
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

Pre-step: Prepare your data for import      Choose data to import      Edit field mapping      Review and start import

**Launch Wizard!**

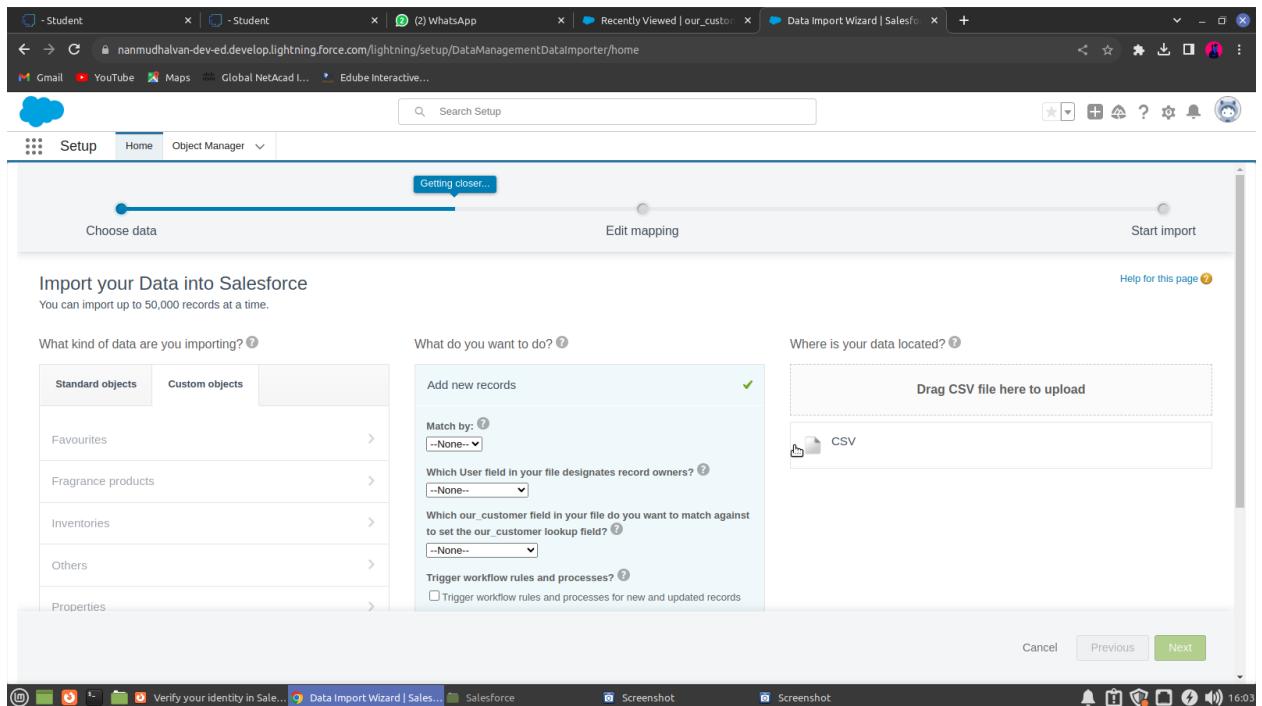
**FAQ**

- How do I prepare my data for import?
- How many records can I import?
- What kind of objects can I import?
- Can I do simultaneous imports?

**Data Import video series**

**Additional Resources**

- Find import templates and other helpful tools
- Learn how to use the Data Import Wizard



## Programming for school records:

```

1 public class schoolHandler {
2
3     public static void beforeDelete(list<School__c> oldlist){
4
5         for(School__c s : oldlist){
6
7             if(s.Schoolwebsite__c == null ){
8
9                 saddError('you cannot delete the record');
10
11         }
12
13     }
14
15 }
16
17 }
```

Developer Console - Google Chrome  
avsgengineeringcollege95-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾

Internalmarks.apxt ▾

Code Coverage: None API Version: 59

```
trigger SchoolTrigger on School__c (before delete) {
    if(trigger.isDelete){
        if(trigger.isBefore){
            schoolHandler.beforeDelete(trigger.old);
        }
    }
}
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Hemasri S	Unknown	ApexTestHandler	28/10/2023, 02:23:03	Success	Unread	4 KB

Type here to search

32°C Partly sunny 02:23 ENG 28-10-2023

Search recent reports... New Report New Folder

Created On Subscribed

28/10/2023, 2:31 pm

17/10/2023, 10:43 am

Developer Console - Google Chrome  
avsgengineeringcollege95-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾

Internalmarks.apxt ▾

Code Coverage: None API Version: 59

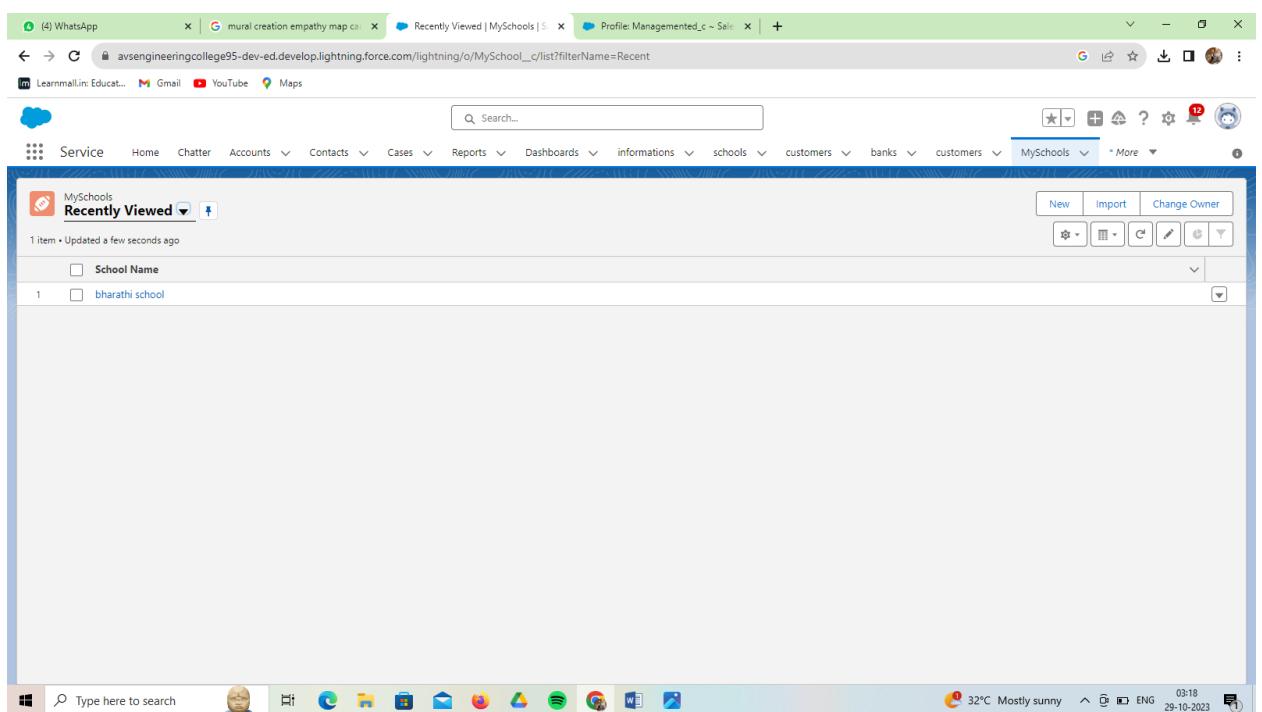
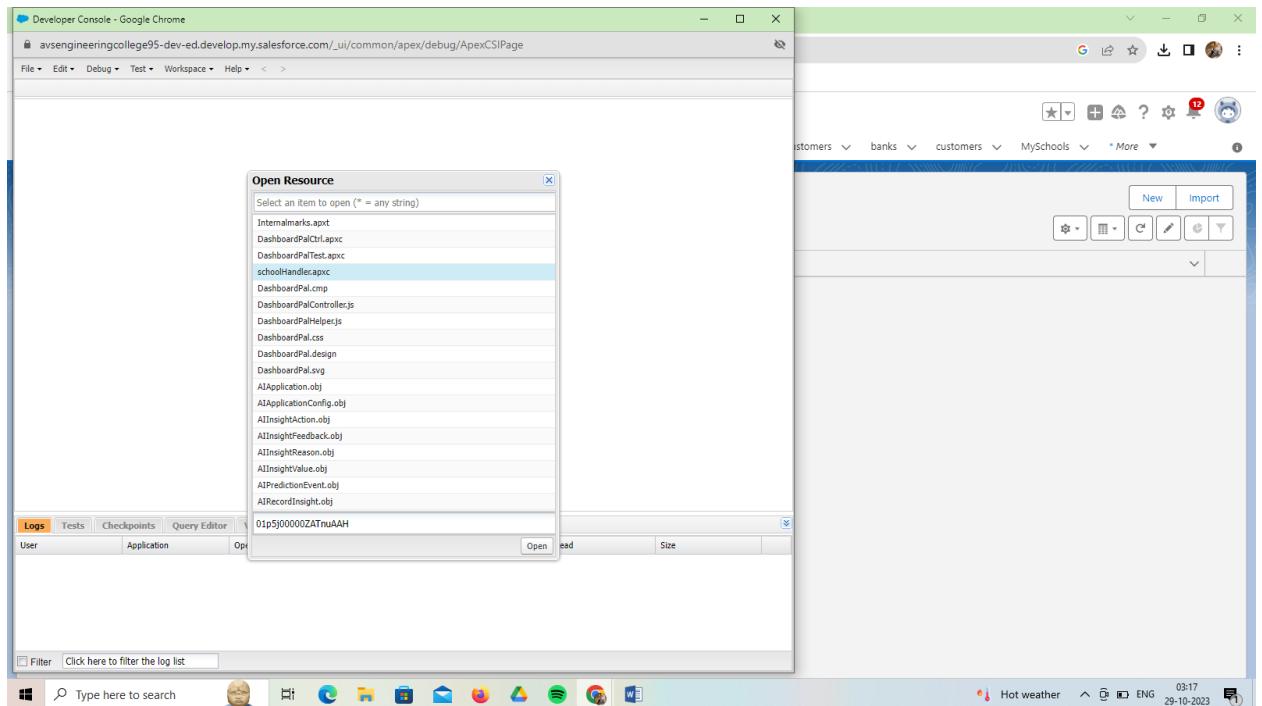
```
trigger Internalmarks on MySchool__c (before insert) {
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size

Type here to search

Match 03:14 29-10-2023



# CHAPTER-4

## AUTOMATION

### 4.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.

The screenshot shows the Salesforce Flows home page. On the left, there is a sidebar with navigation links for Apps (Lightning Bolt, Process Automation, Workflows), Process Automation Actions, Workflow Rules, and Environments. The main area displays a table titled "Flow Definitions All Flows". The table has columns for Flow Label, Process Type, Active, Template, Package State, Packaged, Last Modified Date, and Last Modified User. There are 38 items listed, including "Basic Approval Request", "Book Appointment from invitation", "Cancel Item Flow", etc. The interface includes a search bar at the top and various buttons like "Flow Trigger Explorer" and "New Flow".

The screenshot shows the Salesforce Flow Builder interface. At the top, there is a toolbar with buttons for Free-Form, Run, Debug, Create, Save As, and Save. Below the toolbar, the title "New Flow" is displayed. The "Core" tab is selected, showing a list of flow types: Screen Flow, Record-Triggered Flow, Schedule-Triggered Flow, Platform Event—Triggered Flow, Autolaunched Flow (No Trigger), and Record-Triggered Orchestration. The "Record-Triggered Flow" option is highlighted. The bottom of the screen features a "Get more on the AppExchange" button and a standard Windows taskbar.

Screenshot of the Salesforce Flow Builder interface showing a Record-Triggered Flow for 'MySchool' object.

**Flow Details:**

- Start:** Record-Triggered Flow
- Object:** MySchool
- Trigger:** A record is created
- Optimize for:** Actions and Related Records
- Buttons:** Select Elements, Auto-Layout, Run, Debug, View Tests, Activate, Save As, Save

**Flow Diagram:**

```

graph TD
    Start((Start)) --> Record[Record-Triggered Flow]
    Record --> End((End))
    
```

**Configuration Panels:**

- Select Object:** MySchool
- Configure Trigger:**
  - Trigger the Flow When: A record is created (selected)
  - A record is updated
  - A record is created or updated
  - A record is deleted
- Set Entry Conditions:** None
- Optimize the Flow for:** None

Screenshot of the Salesforce Flow Builder interface showing a Record-Triggered Flow for 'Student flow' object.

**Flow Details:**

- Start:** Record-Triggered Flow
- Run Immediately:** student record creation
- Action:** Action
- End:** End
- Buttons:** Select Elements, Auto-Layout, Run, Debug, View Tests, Deactivate, Save As, Save

**Flow Diagram:**

```

graph TD
    Start((Start)) --> Run[Run Immediately]
    Run --> Action[student record creation Action]
    Action --> End((End))
    
```

**Configuration Panels:**

- Your flow was activated.**
- Version 1: Active—Last modified in a few seconds**

# CHAPTER-5

## REPORTS & DASHBOARD

### 5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits. The report builder provides a drag-and-drop interface to easily build and customize your reports.

The screenshot shows the Salesforce Lightning Home page. At the top, there are several tabs: WhatsApp, mural creation empathy map, Home | Salesforce, Flows | Salesforce, Flow Builder, and Profile: Management\_c. Below the tabs, the main content area features a "Quarterly Performance" dashboard. This dashboard includes a line chart titled "Closed vs Open" showing revenue trends from October to December. The chart shows a significant increase from October to November, reaching approximately 320k, and remaining flat in December. The legend indicates "Closed" (orange line), "Goal" (green line), and "Closed + Open (>70%)". To the right of the chart is an "Assistant" section with a small illustration of a landscape and the message: "Nothing needs your attention right now. Check back later." At the bottom of the dashboard are sections for "Today's Events" and "Today's Tasks", each with a small icon and placeholder text.

The screenshot shows the Salesforce Reports page. The top navigation bar includes tabs for WhatsApp, mural creation empathy map, Home | Salesforce, Flows | Salesforce, Flow Builder, and Profile: Management\_c. Below the tabs, the main content area is titled "Reports" and "Recent". A search bar at the top right contains the text "school". On the left, a sidebar lists categories: "Created by Me", "Private Reports", "Public Reports", "All Reports", "FOLDERS", "All Folders", "Created by Me", "Shared with Me", and "FAVORITES", "All Favorites". The main table displays a list of recent reports. The columns are: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is visible in the list: "Schools with Students report" (Report Name), "Private Reports" (Folder), "Hemarsi S" (Created By), and "28/10/2023, 2:01 am" (Created On). At the bottom of the page is a standard Windows taskbar with icons for various applications like File Explorer, Edge, and Google Chrome.

The screenshot shows a Salesforce interface with a report titled "Schools with Students report". The report displays one record with the following details:

Parent: Parent Name
1 sekar

The browser tabs at the top include WhatsApp, mural creation empathy ma..., Schools with Students report, Flows | Salesforce, Flow Builder, and Profile Management\_c... . The address bar shows the URL for the report.

The screenshot shows a Salesforce user profile page for "Hemasri S". The page is divided into sections:

- Details:** Displays basic information such as Name (Hemasri S), Title, Email (hemasrikar026@gmail.com), Address (IN), Manager, Company Name (AVS Engineering College), Phone, and Mobile.
- About Me:** A text field encouraging users to share their awesomeness on Chatter.
- Chatter:** A section for posting updates, with options for Post, Poll, and Question. It includes a text input field "Share an update..." and a "Share" button.
- Related:** A sidebar listing related items:
  - Groups (0)
  - Files (1) - showing an image file named "images schl" from 18-Oct-2023.
  - Followers (0)
  - Following (0)

The browser tabs at the top include WhatsApp, mural creation empathy ma..., Hemasri S | Salesforce, Flows | Salesforce, Flow Builder, and Profile Management\_c... . The address bar shows the URL for the user profile.

The screenshot shows a Salesforce Lightning interface for a Parent record named 'sekar'. The 'Details' tab is selected. The record contains the following fields:

- Parent Name: sekar
- Parent Address: kallakurichi
- Parent Number: 1234567890
- Owner: Hemasri S
- Created By: Hemasri S, 28/10/2023, 2:33 pm
- Last Modified By: Hemasri S, 28/10/2023, 2:33 pm

The browser taskbar at the bottom shows various open tabs and system status.

The screenshot shows the same Salesforce Lightning interface as the previous one, but with a green success message at the top: "Parent 'sekar' was saved." The rest of the record details are identical to the first screenshot.

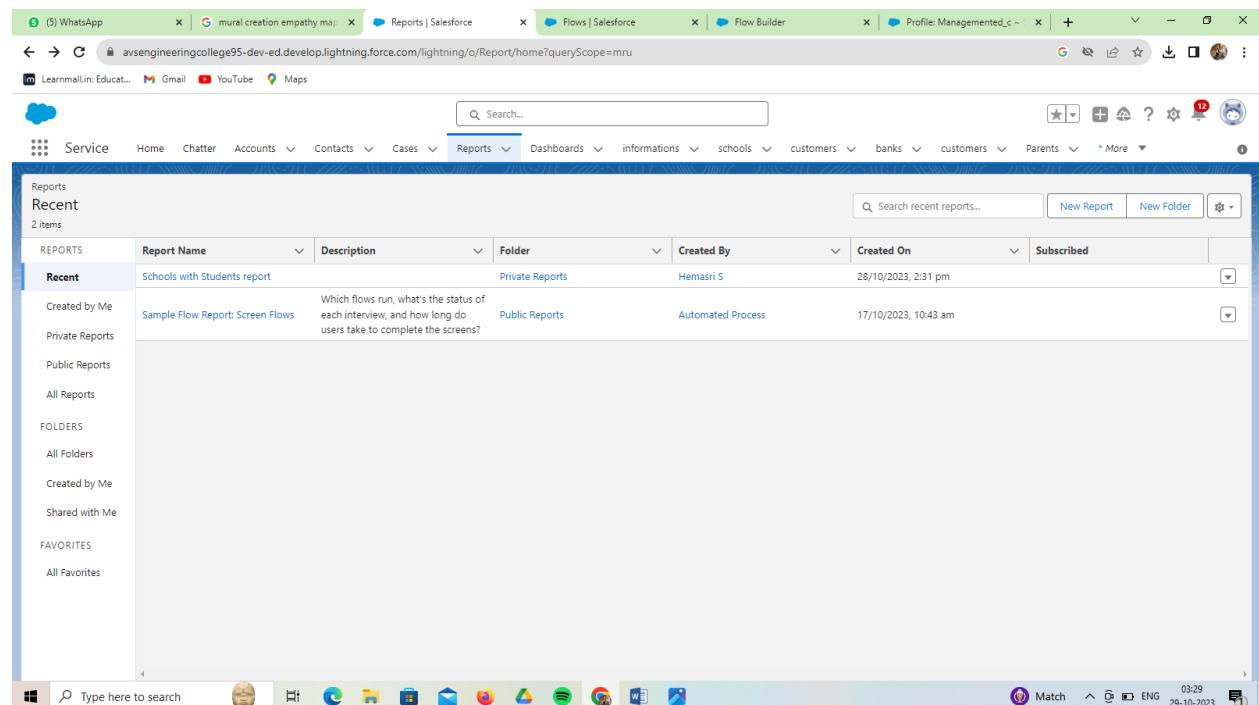
The screenshot shows a Salesforce interface with a report titled "Schools with Students report". The report has a single record with the value "sekar" under the "Parent: Parent Name" column. The browser tabs at the top include WhatsApp, mural creation empathy ma..., Schools with Students report, Flows | Salesforce, Flow Builder, and Profile Management. The system navigation bar at the top includes Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, informations, schools, customers, banks, customers, Parents, and More. The status bar at the bottom shows 32°C Mostly sunny, 03:27, ENG, and 29-10-2023.

## View Report

The screenshot shows the Salesforce Reports page. The "Recent" section displays two reports: "Schools with Students report" and "Sample Flow Report: Screen Flows". The "Schools with Students report" is listed under "Private Reports" and was created by Hemasri S on 28/10/2023, 2:31 pm. The "Sample Flow Report: Screen Flows" is listed under "Public Reports" and was created by Automated Process on 17/10/2023, 10:43 am. The sidebar on the left provides links to Reports, Recent, Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The browser tabs at the top are identical to the previous screenshot. The system navigation bar and status bar are also present at the bottom.

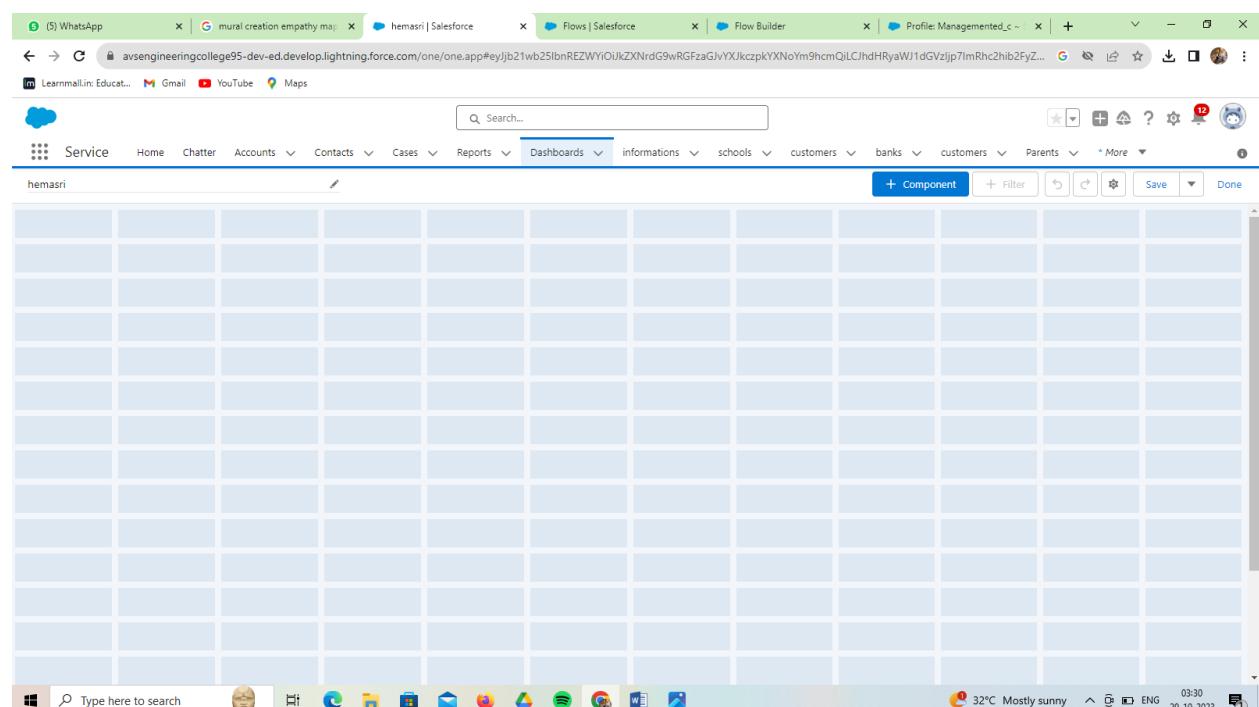
## 5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.

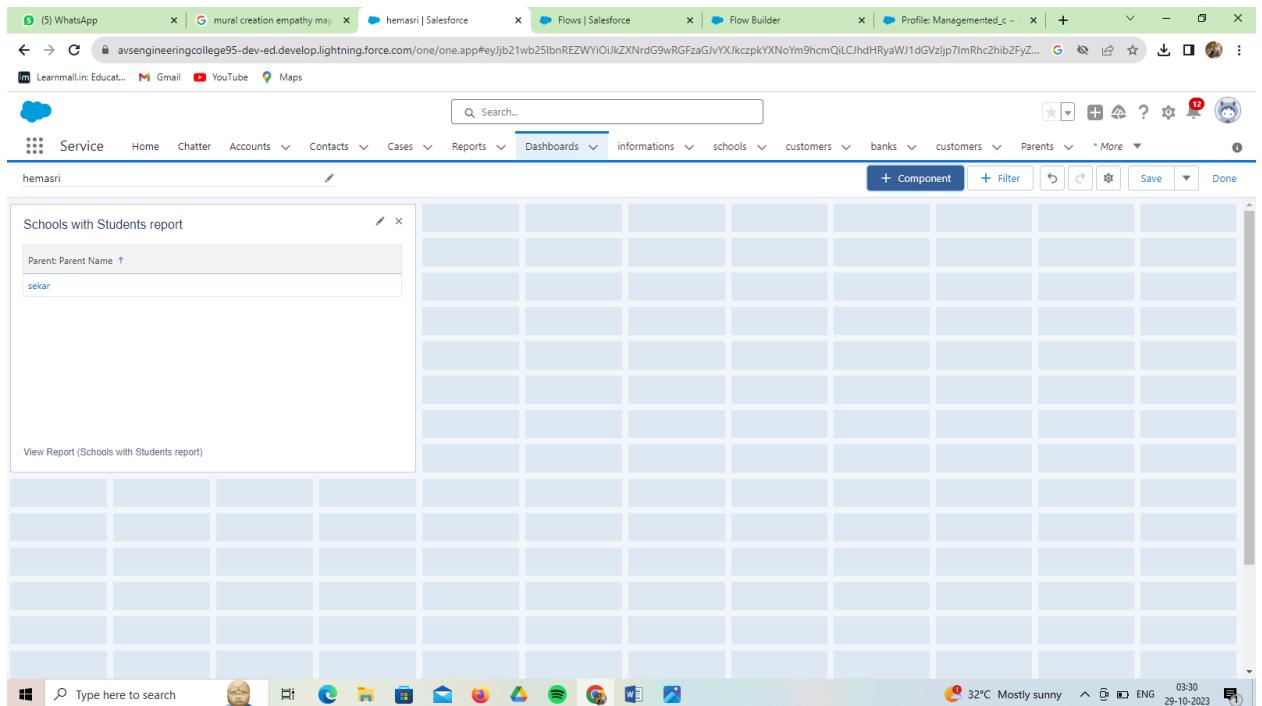


The screenshot shows the Salesforce Reports page. The top navigation bar includes links for WhatsApp, mural creation empathy map, Reports | Salesforce, Flows | Salesforce, Flow Builder, and Profile: Managemented\_c. Below the navigation is a search bar and a toolbar with icons for star, plus, question mark, gear, and more. The main content area displays a table of recent reports:

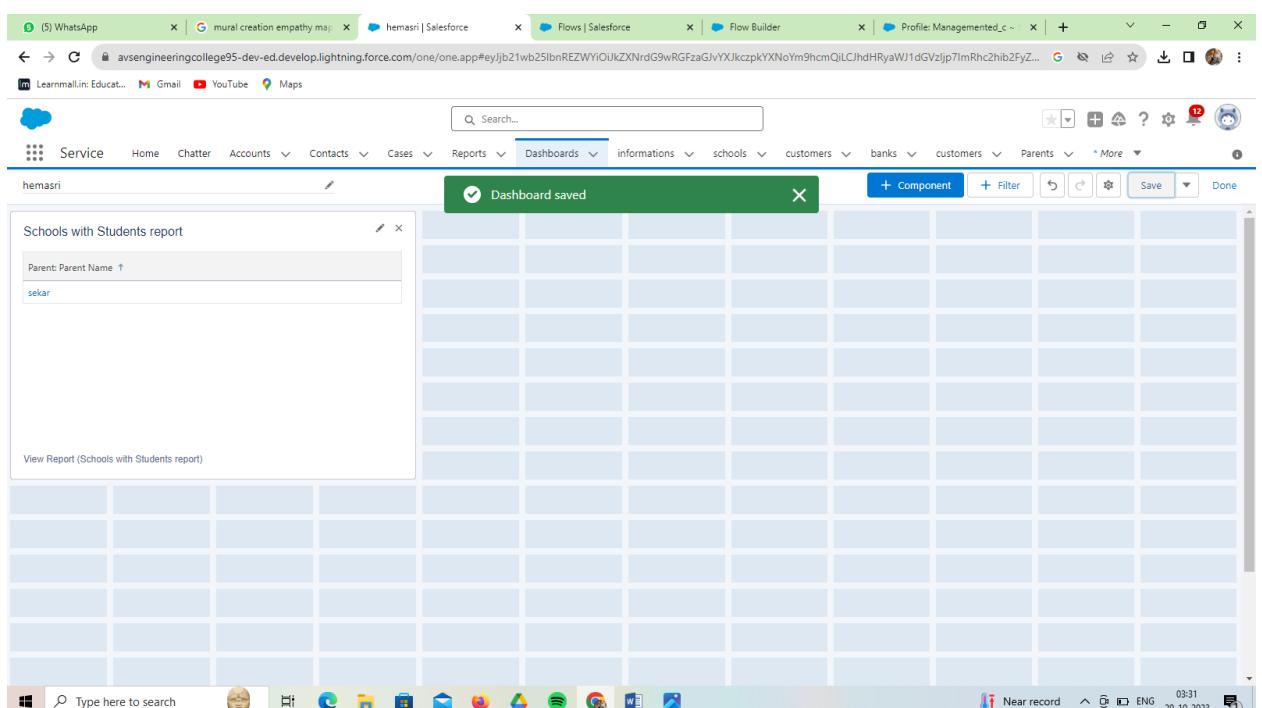
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Schools with Students report	Private Reports	Hemasri S	28/10/2023, 2:31 pm		
Created by Me	Sample Flow Report: Screen Flows	Public Reports	Automated Process	17/10/2023, 10:43 am		
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						



The screenshot shows the Salesforce Flow Builder page. The top navigation bar includes links for WhatsApp, mural creation empathy map, hemasri | Salesforce, Flows | Salesforce, Flow Builder, and Profile: Managemented\_c. Below the navigation is a search bar and a toolbar with icons for star, plus, question mark, gear, and more. The main content area is a large, empty grid representing the flow canvas. At the top of the canvas, there are buttons for '+ Component', '+ Filter', 'Save', and 'Done'.



## View Dashboard



## **CHAPTER-6**

### **CONCLUSION**

An effective conclusion brings the reader back to the main point, reminding the reader of the purpose of the essay. However, avoid repeating the thesis verbatim. Paraphrase your argument slightly while still preserving the primary point.

Briefly restates the main points of the writing and makes sense of any results that were obtained. To write a good conclusion, you can keep these points in mind the points made in the body of the text. Try to write these in a different way from how they were written in the body.

In all the school management system is bringing a great difference in the lives of students, teachers, parents, and the admin. Good management offers better productivity and hence more progress towards development.

School management software is an essential tool for educational institutions. It helps to streamline administrative tasks, improve communication, and enhance overall efficiency.

The “SCHOOL MANAGEMENT SYSTEM” deals with all kind of student details, academic related reports, curriculum, batch details and other resource related details too.

This creative problem solving is accomplished through four functions of management: planning, organizing, leading and controlling.

## **CHAPTER-7**

### **PROJECT DEMONSTRATION**

**GitHub:**

<https://github.com/S33HEMASRI/Salesforce>

**Demo Link:**

[https://drive.google.com/file/d/1TYUas7mx93YVqT8ekIZOis6gFYJwDYBR/view  
?usp=sharing](https://drive.google.com/file/d/1TYUas7mx93YVqT8ekIZOis6gFYJwDYBR/view?usp=sharing)