



## PROJECT TITLE : CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT – ADMIN



Presented by

Team Id: LTVIP2023TMID06123

Team Leader: Shaik Ruksana ([208x1a05g1@khitguntur.ac.in](mailto:208x1a05g1@khitguntur.ac.in))

Team Member 1: Balineni Srilakshmi([208x1a05c8@khitguntur.ac.in](mailto:208x1a05c8@khitguntur.ac.in))

Team Member 2: Kambhampati Akhil([208x1a05e7@khitguntur.ac.in](mailto:208x1a05e7@khitguntur.ac.in))

Team Member 3: Maddu Ramya ([208x1a05f2@khitguntur.ac.in](mailto:208x1a05f2@khitguntur.ac.in))

Team Member 4: Chalamalasetty Keerthana([208x1a05d6@khitguntur.ac.in](mailto:208x1a05d6@khitguntur.ac.in))

Team Member 5: Rentapalla Vamsi ([218x5a0208@khitguntur.ac.in](mailto:218x5a0208@khitguntur.ac.in))

# Our Trailblazer accounts

<u>Name</u>	<u>Profile Id</u>
1.Shaik Ruksana	- <a href="https://www.salesforce.com/trailblazer/s208x1a05g1">https://www.salesforce.com/trailblazer/s208x1a05g1</a>
2.Balineni Srilakshmi	- <a href="https://www.salesforce.com/trailblazer/s208x1a05c8">https://www.salesforce.com/trailblazer/s208x1a05c8</a>
3.Kambhampati Akhil	- <a href="https://www.salesforce.com/trailblazer/akambhampati5">https://www.salesforce.com/trailblazer/akambhampati5</a>
4.Maddu Ramya	- <a href="https://www.salesforce.com/trailblazer/s208x1a05f2">https://www.salesforce.com/trailblazer/s208x1a05f2</a>
5.Chalamalasetty Keerthana	- <a href="https://trailblazer.me/id/s208x1a05d61">https://trailblazer.me/id/s208x1a05d61</a>
6.Rentapalla Vamsi	- <a href="https://www.salesforce.com/trailblazer/s218x5a0208">https://www.salesforce.com/trailblazer/s218x5a0208</a>

## INTRODUCTION

### **Overview:**

Salesforce, Inc. is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management (CRM) software and applications focused on sales, customer service, marketing automation, e-commerce, analytics, and application development. Founded by former Oracle executive Marc Benioff, Salesforce quickly grew into one of the largest companies in the world, making its IPO in 2004. Salesforce's continued growth makes it the first cloud computing company to reach US\$1 billion in annual revenue by fiscal year 2009, and the world's largest enterprise software firm by 2022. Salesforce was founded by executive Marc Benioff, together with Parker Harris, Dave Moellenhoff, and Frank Dominguez as a software as a service (SaaS) company. Two of Salesforce's earliest investors were Larry Ellison, the co-founder and first CEO of Oracle, and Halsey Minor, the founder of CNET.

### **Salesforce Services:**

Salesforce offers several customer relationship management (CRM) services, including Sales Cloud, Service Cloud, Marketing Cloud, and Commerce Cloud and Platform. Additional technologies include Slack.

### **Main services:**

Salesforce's main services are for customer management. Other services include app creation, data integration and visualization, and training... **Salesforce Platform:**

Salesforce Platform (formerly known as Force.com) is a platform as a service (PaaS) that allows developers to add applications to the main Salesforce.com application. These applications are hosted on Salesforce.com's infrastructure. Force.com applications are built using Apex, a proprietary Java-like programming language to generate HTML originally via

the "Visualforce" framework. Beginning in 2015 the "Lightning Components" framework has been supported. As of 2014, the Force.com platform had 1.5 million registered developers according to SalesForce.

#### **Trailhead:**

Launched in 2014, Trailhead is a free online learning platform with courses focused on Salesforce technologies.

#### **AppExchange:**

Launched in 2005, the Salesforce AppExchange is an online app store that allows users to sell third-party applications and consulting services.

### **Overview: School Management Project**

A school management system is an information management system for educational institutions to manage student data. It helps teachers get information about students faster, easier and reduces their workload. Student databases in school management systems contain information about the students, such as their exam grades, parent information, medical history, tuition fees, etc. School management systems provide skills such as student registration, class documents, grades, analytical grades for students, and other assessment elements. In addition, school management systems are used to plan the curriculum of students, record their presence and manage the needs of students in the school. School management solutions are web and mobile-based applications with centralized data storage structures that make it easier for administrators, students, teachers, and parents to access data from iPhone and Android devices.

There are various software tools you can use to automate your organization to achieve your goals and take advantage of digitalization in operation, and school management software is an integral part of every school or college. The school management software consists of several modules that manage the entire school life cycle that includes:

- ✓ Student enrollment.
- ✓ School activities.
- ✓ Fees collection.
- ✓ Student's reports.
- ✓ Transportation.
- ✓ Libraries

In our School Management Project, first our team members will be created three different objects called School, Student and Parent for web interface for everyone who accessed the School Management Service in the site. Second our team members will be created School fields, Student Fields and Parent fields to be filled information in future. Next, our team members will be created school profile (e.g standard user). Next, we should create three users such as parent, teacher and principal. Next, we will be created permission sets such as

read, edit, created for principal, Parent, school, student objects. Next, we will add data to student object. Finally, we will created, saved, viewed and deleted various reports.

### **Purpose:**

- 1.The project aims to develop an application for school management that automates administrative tasks, enhancing efficiency and reducing manual effort.
- 2.It centralizes student, teacher, and staff information, ensuring better data management and accuracy in records.
- 3.The application fosters seamless communication between teachers, parents, students, and administrators through announcements and notifications.
- 4.It simplifies attendance tracking, academic performance monitoring, and examination/result management for teachers and administrators.
- 5.The application provides valuable reports and analytics to aid data-driven decision-making for improved school performance and resource management.

## **LITERATURE SURVEY**

### **Existing Problem:**

- 1.The existing problem with the creation of an application for school management is the lack of a unified and efficient system to handle various administrative tasks.
- 2.Many schools still rely on manual processes, spreadsheets, and disparate software, leading to inefficiencies, data inconsistencies, and communication gaps.
- 3.This fragmented approach often results in difficulties in tracking attendance, managing student information, generating accurate reports, and ensuring smooth communication among teachers, parents, and administrators.
4. The absence of a comprehensive and user-friendly school management application hampers the overall efficiency and effectiveness of school operations.

### **Proposed Solution:**

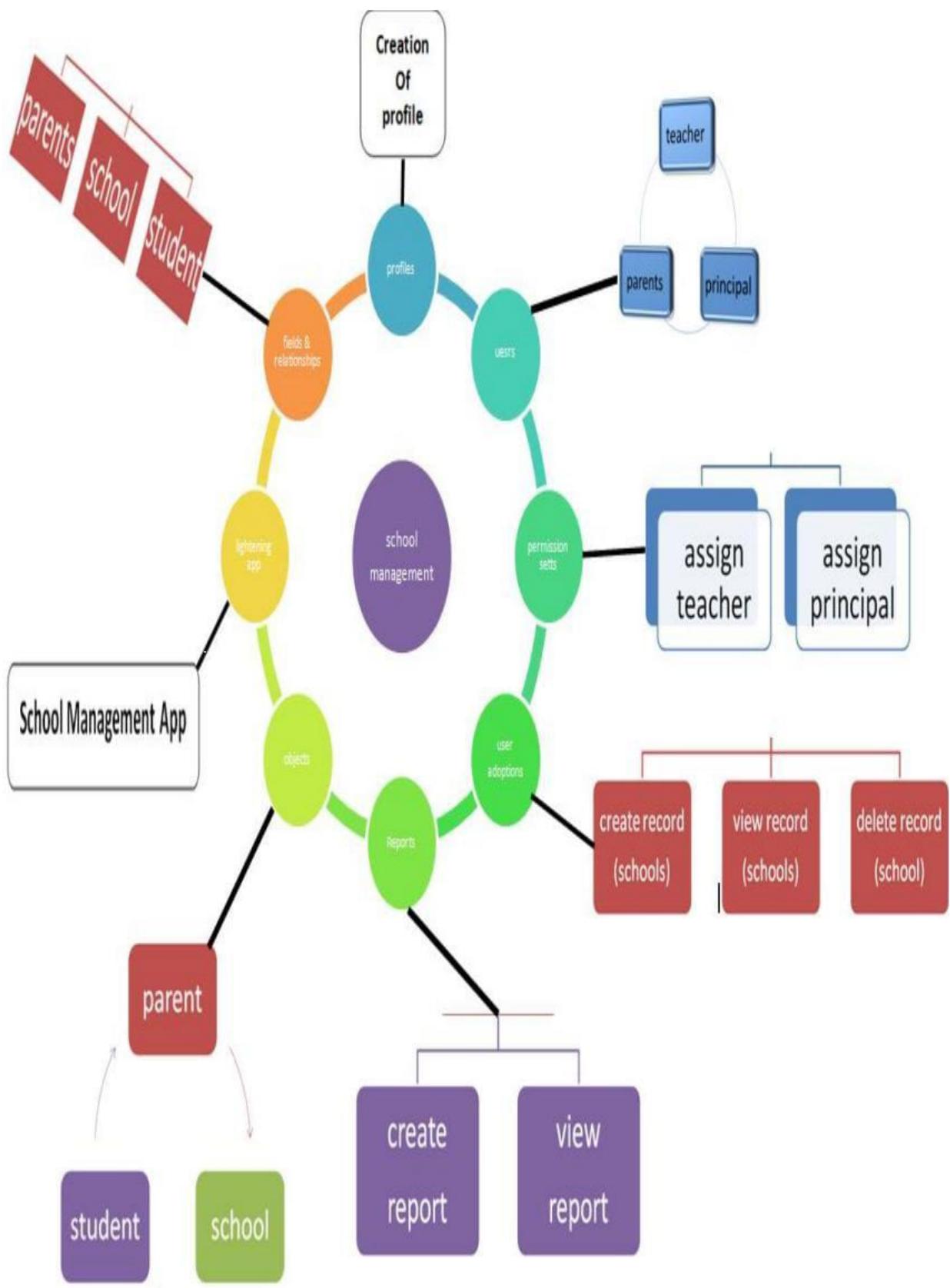
- 1.The proposed solution to suggest is to develop a comprehensive cloud-based school management application with an intuitive interface, automation features, and seamless integration.
2. It will facilitate efficient attendance tracking, academic management, and communication among teachers, parents, students, and administrators.

3. The application will provide valuable insights through analytics and reports, ensuring data-driven decision-making.
4. With robust security measures and customization options, schools can enhance overall efficiency and productivity, creating a more streamlined and effective learning environment.

## THEORITICAL ANALYSIS

### **Block Diagram:**

Diagrammatic Overview of the project:



## **Hardware and Software Designing:**

In the Salesforce platform, the School Management Application would be developed as a cloud-based software solution, which means most of the hardware requirements would be taken care of by Salesforce itself. However, there are still some essential hardware and general requirements to consider:

### **Hardware requirements of the project:**

#### **Memory (RAM)**

- ✓ 8 GB RAM
- ✓ 16 GB RAM if the access node also hosts the database

#### **Processor**

- ✓ Minimum of 8 CPUs/processors.

### **Software requirements of the project:**

#### **Browsers**

- ✓ Google Chrome
- ✓ Safari
- ✓ Mozilla Firefox
- ✓ Microsoft Edge

#### **Mobile and Desktop Operating Systems**

- ✓ Mac: macOS 10.14 (Mojave) or later
- ✓ Windows: Windows 7 or later
- ✓ iOS: iOS 13 or later
- ✓ Android: Android 5.0 (Lollipop) or later

## **PROCESS AND RESULTS**

Final findings (Output) of the project along with screenshots.

### **1.Creating Developer Org:**

Creating a developer org in salesforce

- a. Go to [developer.salesforce.com](https://developer.salesforce.com)
- b. Click on sign up.
- c. On the sign up form, enter the following details
  1. First name & Last name

2. Email
3. Role – Administrator
4. Company - College Name
5. Country – India
6. Postal Code - pin code
7. Username- should be a combination of your name and company

First Name\*  
Shaik

Last Name\*  
Ruksana

Email\*  
208x1a05g1@khitguntur.ac.in

Role\*  
Administrator

Company\*  
KHTProject

Country/Region\*  
India

Postal Code\*  
522004

Username\*  
ruksanasrilakshmi@project.com

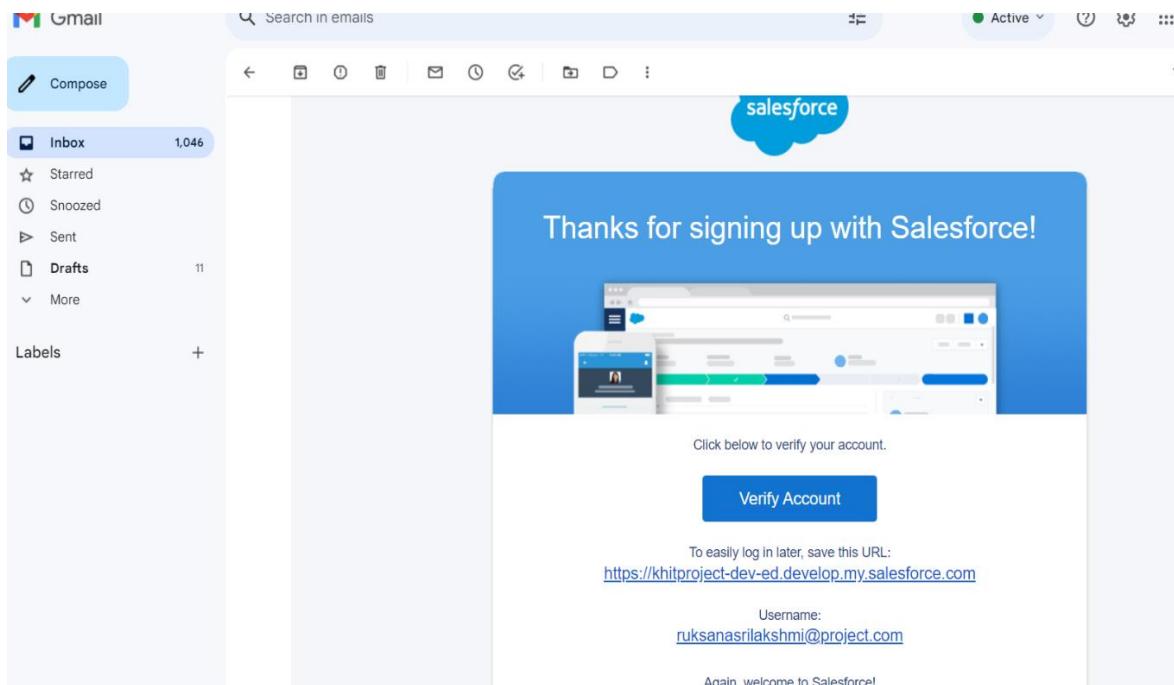
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time.

## 2.Account Activation:

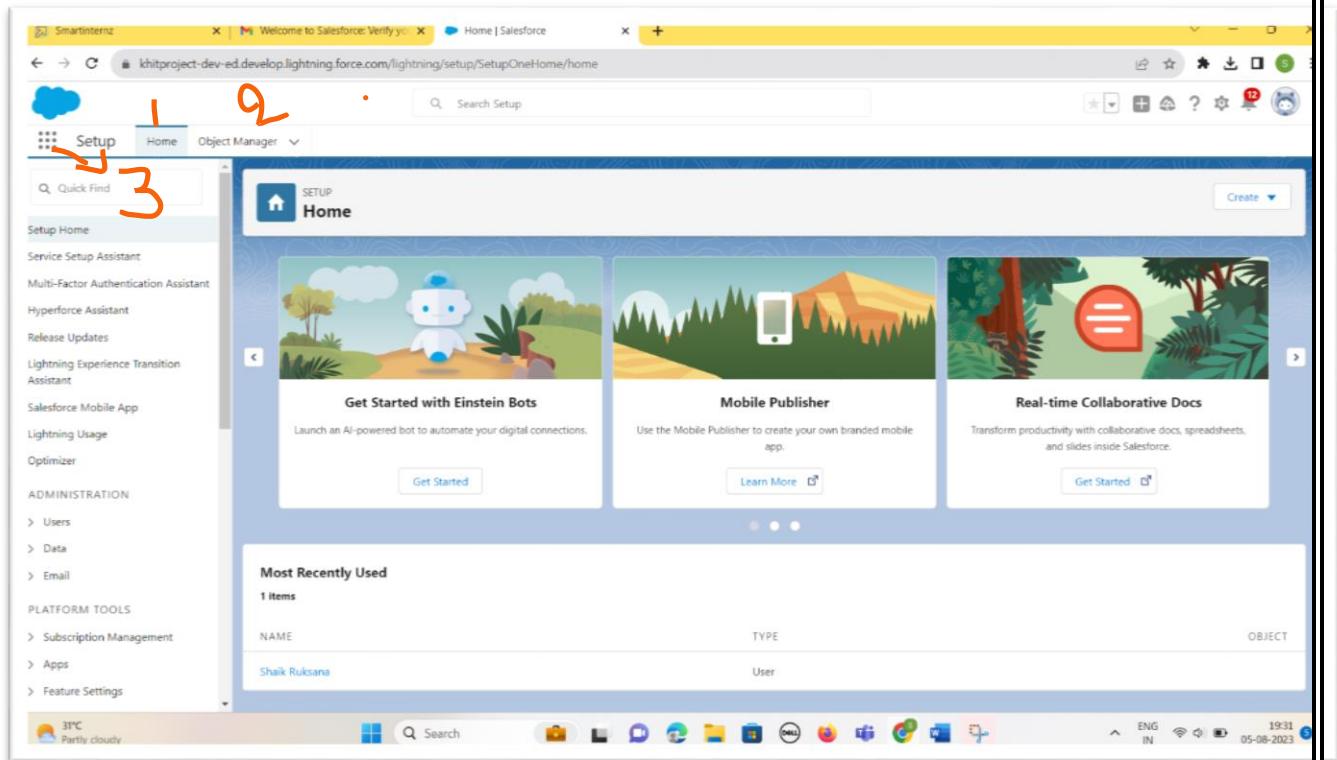
We have to verify our email to activate the account. So, click on verify account to activate the Salesforce Account



After verifying, it asks to set up the password including a security question like below:

A screenshot of the 'Change Your Password' page from Salesforce. The page features the Salesforce logo at the top. The main heading is 'Change Your Password'. Below it, instructions say 'Enter a new password for ruksanasrilakshmi@project.com. Make sure to include at least:'. There are three radio buttons for '8 characters', '1 letter', and '1 number'. Below these are two input fields labeled 'New Password' and 'Confirm New Password'. Underneath is a 'Security Question' section with a dropdown menu showing 'In what city were you born?'. Finally, there is an 'Answer' input field and a 'Change Password' button at the bottom.

After setting the password, the page redirects to the Salesforce Setup Page where we are going to do each and every step regarding our project. It looks like this.



Here's a brief introduction to the key components of the Salesforce setup page:

- 1.Home**: The central hub for Salesforce administrators to access and manage all setup options.
- 2.Object Manager**: Customize and manage standard and custom objects, defining data structure and relationships.
- 3.App Launcher**: Easily switch between Salesforce apps and custom-built applications.

## 3.OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

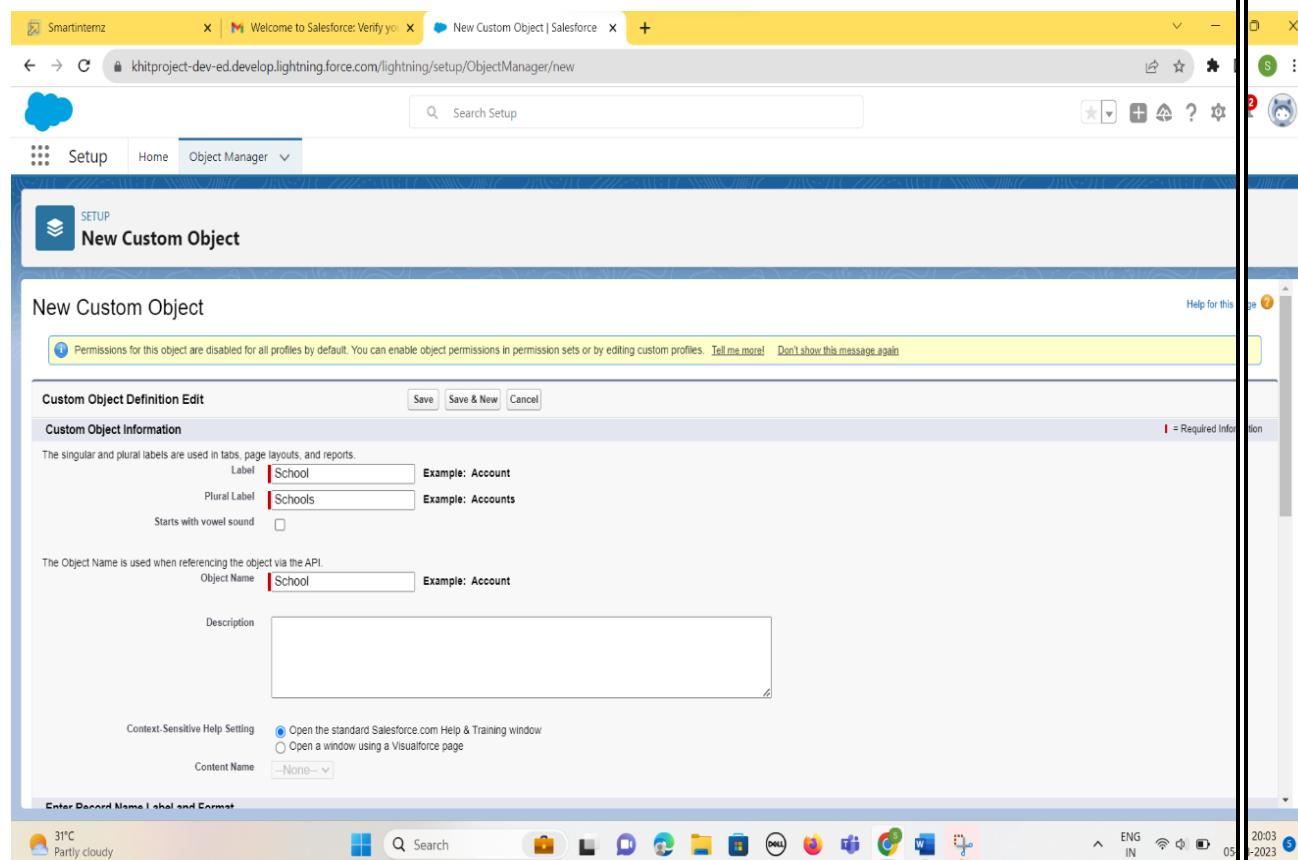
- ❖ **Standard Objects**: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- ❖ **Custom Objects**: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

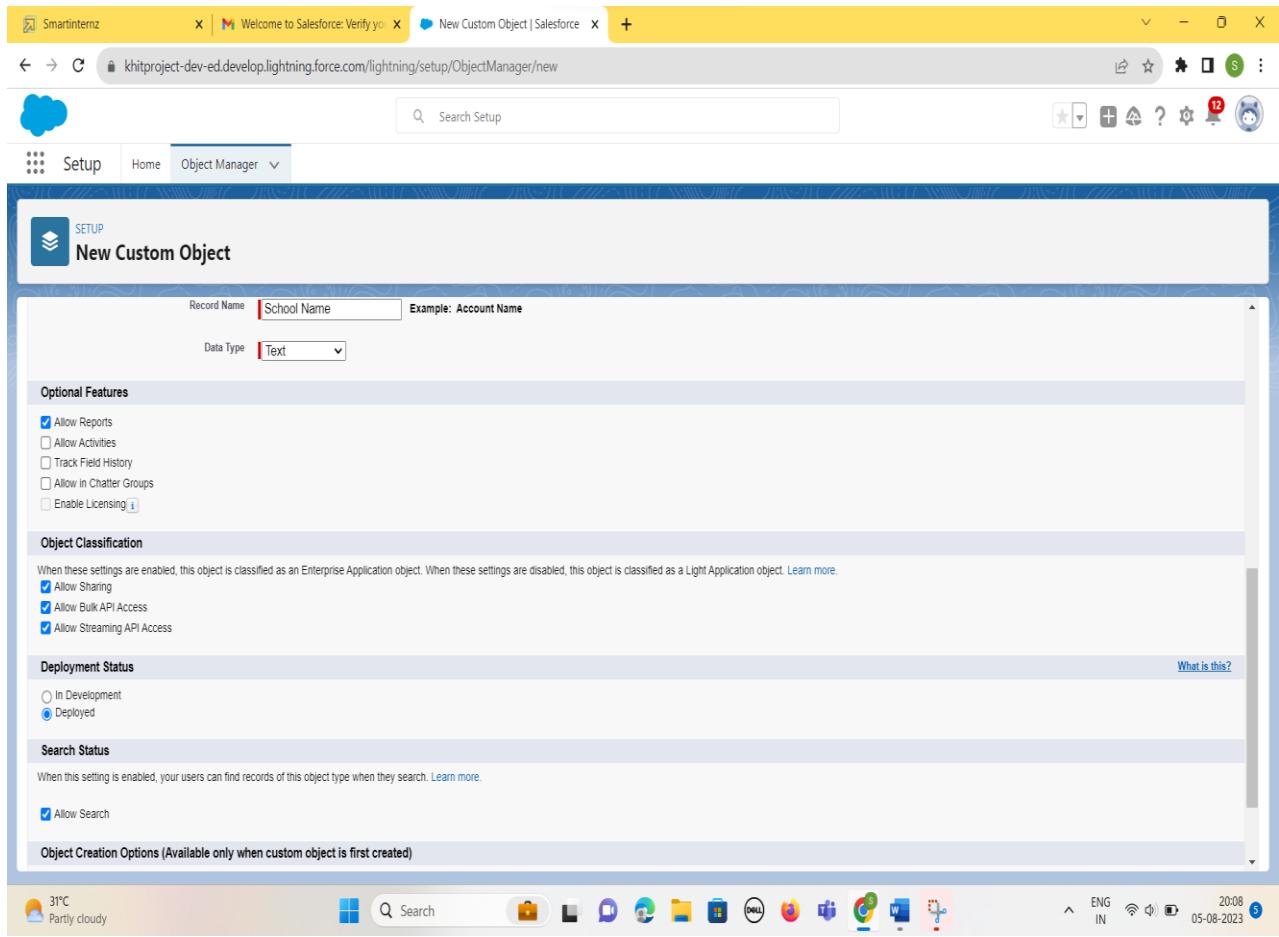
**Coming to our project we have to create three custom objects:**

- 1.School Object
- 2.Student Object
- 3.Parent Object

Goto Object Manager and select Custom Object New and Create three objects  
First Object – School

1. Label: School
2. Plural Label: Schools
3. Record Name: School Name
4. Check the Allow Reports checkbox
5. Check the Allow Search checkbox
6. Click Save.





Now create a custom tab. Click the Home tab.

Search for Tabs Then Click it → Custom Tab → New

Action	Label	Tab Style
Edit   Del	Schools	Building

Select Object as School. And any Tab style. Click Next, Next and then Save. It looks like this.

Custom Object Tabs		New	What Is This?
Action	Label	Tab Style	
Edit   Del	Schools		Building

In the same way, we created the two Custom objects like Student Object and Parent Object and their respective tabs as below:

Custom Object Tabs		
Action	Label	Tab Style
Edit   Del	<u>Parents</u>	 Telescope
Edit   Del	<u>Schools</u>	 Building
Edit   Del	<u>Students</u>	 Books

## 4.Creating the Lightning App

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

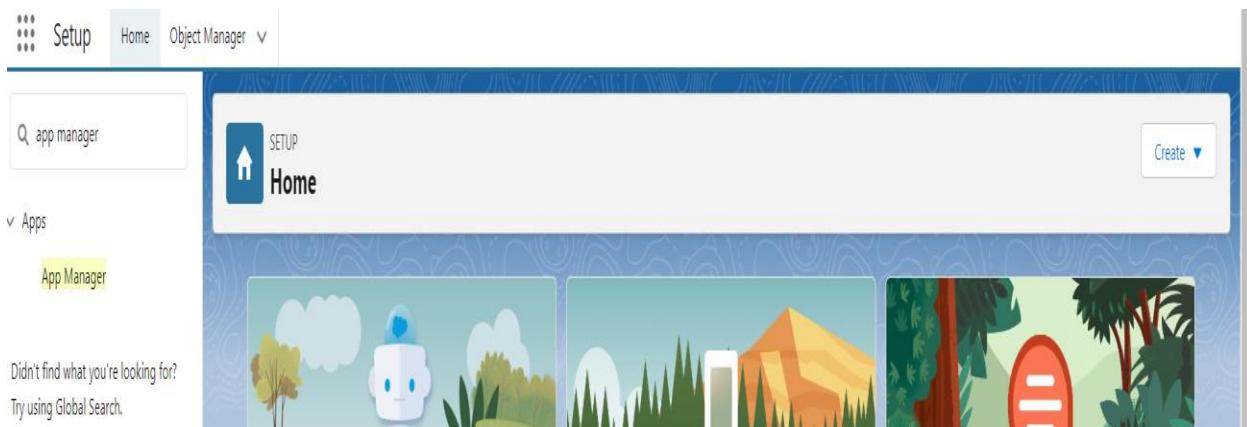
There are two types of app -

**1. Standard App:** Standard apps come with every occurrence of Salesforce as default.

Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.

**2. Custom Apps:** Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter School Management as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



## 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 ⓘ  
School Management

\* Developer Name ⓘ  
School Management

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

Next

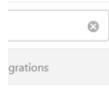
## New Lightning App

dash

-  Schools
-  Students
-  Parents
-  Reports
-  Dashboards

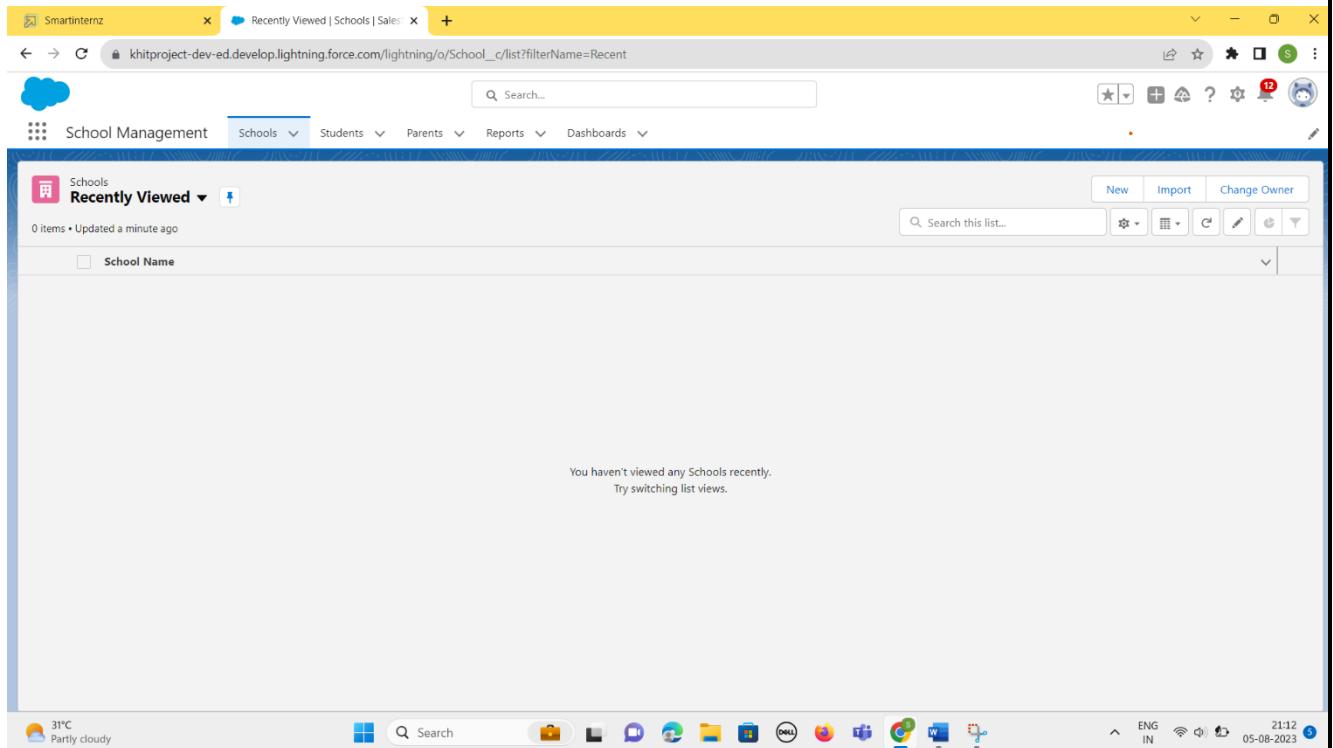
Back Next

## New Lightning App

 System Administrator


Save & Finish

If we want to check the app we have created .Goto App Launcher→Search for the School Management App→Click it. The App looks like this.



## 5.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.

## Creation Of Fields for The School Object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
  2. Click the Object Manager tab next to Home.
  3. Select School.
  4. Select Fields & Relationships from the left navigation
  5. Click New
  6. Select the Text Area as the Data Type, click Next.
  7. For Field Label, enter Address.
  8. Click Next, Next, then Save & New.
  9. Follow steps 1 to 3 and create two more Text type field - District & State.
  10. Create URL type field & give School website as the field label.

We have to create 5 fields for the School Object. They are – *Address, District, State, Phone, URL* with their respective Relationships.

Setup | Home | Object Manager

### School

**Fields & Relationships**

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)		✓
School Name	Name	Text(80)		✓

Setup | Home | Object Manager

### School

**New Custom Field**

Step 2. Enter the details Step 2 of 4

Field Label: Address

Field Name: Address

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ('The\_Text'), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format ('Today') + 7). To reference a field from a Custom Metadata type record use \${CustomMetadata.Type\_\_r.Name\_\_c}

## After creating all the required fields for the School Object

Smartinternz | School | Salesforce

Search Setup

### School

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text(15)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School website	School_website__c	URL(255)		
State	State__c	Text(15)		

School website

School\_website\_c

URL(255)

## *Creation Of Fields for The Student Objects:*

Field 1 – Results and Relationship is of Picklist type and we have to enter the picklist values as Pass, Fail.

Field 2- Class and Relationship is of Number type

Field 3- Marks and Relationship is of Number type

Field 4- Number of Students and Relationship is of Roll-up Summary type

After creating the required above fields looks like this

The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'Fields & Relationships' and lists seven items. The table 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)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks_c	Number(18, 0)		
Results	Results_c	Picklist		
School	School_c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'Fields & Relationships' and lists eleven items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, and CONTROLLING FIELD. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
District	District_c	Text(15)	
Highest Marks	Highest_Marks_c	Roll-Up Summary (MAX Student)	
Last Modified By	LastModifiedById	Lookup(User)	
Number of students	Number_of_students_c	Roll-Up Summary (COUNT Student)	

## *Creation Of Fields for The Parent Objects:*

We have to create 2 fields :

Field1 – Parent Address and relationship is of Text area

Field2- Parent Number and relationship is of Phone.

After creating the above two fields, it looks like this:

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' tab selected. The main area displays a table titled 'Fields & Relationships' with 6 items, sorted by Field Label. The table 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
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		

## **6.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.

### **Creation On Profile:**

- 1.From Setup enter Profiles in the Quick Find box
- 2.Select Profiles.
- 3.Click new, From the list of profiles, find Standard User (profile to clone)
- 4.For Profile Name, enter School Profile
- 5.Click Save.
- 6.While still on the School Profile page, then click Edit.
- 7.Scroll down to Custom Object Permissions and Give view all access permissions.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar has a tree view with 'Users' expanded, showing 'Profiles' which is circled in red. The main content area displays a table of profiles. A specific row for 'Standard User' is also circled in red.

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

This screenshot shows the 'School Profile' configuration page. It includes sections for Record Types (Incidents, Individuals, Invoices, Leads), Custom Object Permissions (for Parents and Schools), and Session Settings.

The “School Profile” is created as below:

This screenshot shows the 'School Profile' details page. It includes sections for Profile Detail (Name: School Profile, User License: Salesforce, Description: [empty], Created By: Shaik Rukhsana, 06/08/2023, 8:54 pm), Record Type Settings (with a note about Record Types), and a list of permissions at the bottom.

Profile  
School Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Log in IP Range (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail					
Name	School Profile	Edit	Clone	Delete	View Users
User License	Salesforce				Custom Profile <input checked="" type="checkbox"/>
Description					
Created By	Shaik Rukhsana, 06/08/2023, 8:54 pm				Modified By Shaik Rukhsana, 06/08/2023, 8:56 pm

## 7. Users

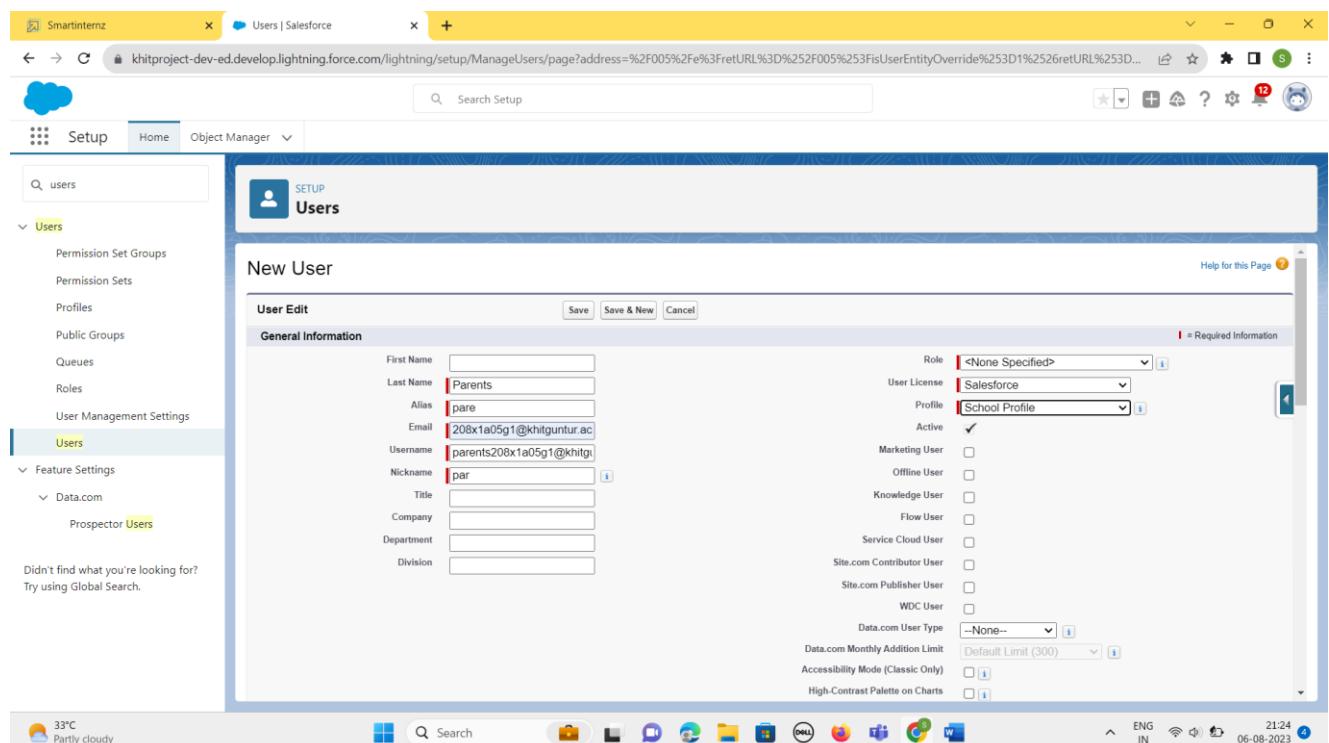
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

### Creating A User:

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. 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.
5. Select a User License as salesforce.

NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license or change the license type from Salesforce to any other.

6. Select a profile as a School Profile.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
8. Similarly follow the above steps and create 2 users as Teachers and principals.



Similarly, we created two users -Teachers and Principals like below:

The screenshot shows the Salesforce Setup - Users page. At the top, there's a header with a user icon and the word "SETUP". Below it, the word "Users" is displayed. The main section is titled "All Users". A sub-header says "On this page you can create, view, and manage users." and provides links for "View: All Users" and "Edit | Create New View". Below this, there's a note about mobile access: "In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)". The main content area is a table listing users. The columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. The rows are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000cmbz9ead.ehx6v2brlwlm@chatter.salesforce.com		<input checked="" type="checkbox"/>	<a href="#">Chatter Free Use</a>
<input type="checkbox"/> Edit	Parents	pare	parents.208x1a05g1@khitguntur.ac.in		<input type="checkbox"/>	<a href="#">School Profile</a>
<input type="checkbox"/> Edit	principals	prin	princ208x1a05g1@khitguntur.ac.in		<input checked="" type="checkbox"/>	<a href="#">School Profile</a>
<input type="checkbox"/> Edit	Ruksana Shaik	SRuks	ruksanasrilakshmi@project.com		<input checked="" type="checkbox"/>	<a href="#">System Administ</a>
<input type="checkbox"/> Edit	Teachers	teac	tea208x1a05g1@khitguntur.ac.in		<input type="checkbox"/>	<a href="#">School Profile</a>
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5j00000cmbz9ead.com		<input checked="" type="checkbox"/>	<a href="#">Analytics Cloud I</a>
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5j00000cmbz9ead.com		<input checked="" type="checkbox"/>	<a href="#">Analytics Cloud S</a>

## 8.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.

### Permission Sets 1:

- 1.From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- 2.Click New.
- 3.Give the name of the Permission set name as teacher permission.
- 4.Under the object settings give the view create and edit permissions to all 3 custom objects (By click open the object)
- 5.Click on manage assignment
- 6.Click on add assignment.
- 7.Click on Teacher (user), Next, Assign.

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

**Permission Sets**

Help for this Page

Permission Sets

On this page you can create, view, and manage permission sets.

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

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

New

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

SETUP

**Permission Sets**

Permission Set Create

Save Cancel

Enter permission set information

Label	teacher permission
API Name	teacher_permission
Description	
Session Activation Required	<input type="checkbox"/> <a href="#">i</a>

Permission Set  
**teacher permission**

Find Settings... | [Clone](#) | [Delete](#) | [Edit Properties](#) | [Manage Assignments](#)

Permission Set Overview > Object Settings Schools

Schools Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> <a href="#">i</a>

Object Permissions

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

... > PERMISSION SET 'TEACHER PERMISSION' > MANAGE ASSIGNMENT EXPIRATION

### teacher permission

Select an Expiration Option For Assigned Users

No expiration date (1)

Specify the expiration date

1 Day	1 Week	30 Days	60 Days	Custom Date
-------	--------	---------	---------	-------------

Time Zone  
Select a time zone...

**Selected Users**

Full Name	Role	Profile	Active	User License	Expires On
Teachers	School Profile	✓	Salesforce	Never Expires	

[Cancel](#) [Back](#) [Assign](#)

## Permission Sets 2:

Similarly, we create another permission set that is Principal permission.

**SETUP**  
**Permission Sets**

### Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play.

[All Permission Sets](#) [Edit](#) | [Delete](#) | [Create New View](#)

<input type="checkbox"/> Action	Permission Set Label	Description
<input type="checkbox"/> <a href="#">Del</a>   <a href="#">Clone</a>	<a href="#">Principal permission</a>	

## 9.User Adoption

### Create Record (School):

1.Click on App Launcher on left side of screen.

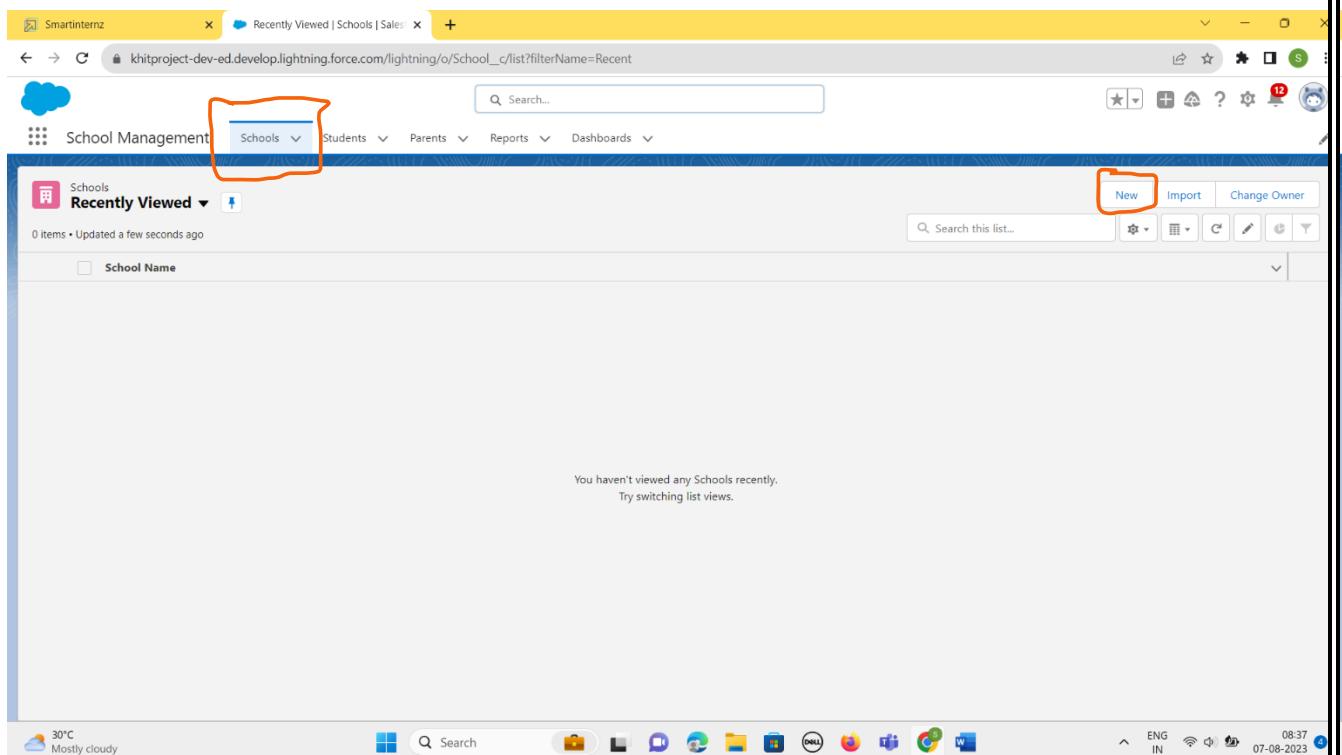
2. Search School Management App & click on it.

3. Click on Schools tab.

4. Click new button

5. Fill all School record details.

6. Click on Save Button



Clicking new, we have to fill the details of the school like School Name, Address, State, District, Phone Number, School Website.

This is displayed below:

Smartinternz New School | Salesforce

[khitproject-dev-ed.lightning.force.com/lightning/o/School\\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\\_VIEW&uid=169137774566150382&b...](https://khitproject-dev-ed.lightning.force.com/lightning/o/School_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=169137774566150382&b...)

School Management Schools

Recently Viewed Schools

0 items • Updated 3 minutes ago

School Name

Information

\*School Name: Shalome English Medium School

Address: Seethamma colony 5 lane, Guntur

District: Guntur

State: AndhraPardesh

Phone Number: 7856785689

School website: www.sems.com

Owner: Shaik Ruksana

New Import Change Owner

Cancel Save & New Save

30°C Mostly cloudy

Search

ENG IN 08:40 07-08-2023

## View Record (School):

Smartinternz Shalome English Medium School

[khitproject-dev-ed.lightning.force.com/lightning/r/School\\_c/a005j00000NiVKoAAN/view](https://khitproject-dev-ed.lightning.force.com/lightning/r/School_c/a005j00000NiVKoAAN/view)

School Management Schools Students Parents Reports Dashboards

Shalome English Medium School

New Contact Edit New Opportunity

Related Details

School Name: Shalome English Medium School

Address: Seethamma colony 5 lane, Guntur

District: Guntur

State: AndhraPardesh

Phone Number: 7856785689

School website: www.sems.com

Number of students: 0

Highest Marks:

Created By: Shaik Ruksana, 07/08/2023, 8:42 am

Last Modified By: Shaik Ruksana, 07/08/2023, 8:42 am

30°C Mostly cloudy

Search

ENG IN 08:40 07-08-2023

## Delete Record (School):

The screenshot shows the Salesforce interface for managing schools. At the top, it displays the school name: "Shalome English Medium School". Below this, the "Details" tab is selected, showing various fields such as School Name, Address, District, State, Phone Number, School website, and Number of students. To the right, a context menu is open, listing options like "New Case", "Edit", "New Opportunity", "Delete" (which is highlighted with a red box), "Clone", "Change Owner", and "Printable View".

By Clicking it, The School named “*Shalome English Medium School* ” will be deleted . And it is not Visible.

This screenshot shows the Salesforce Schools list view. It includes a "Recently Viewed" section with a count of 0 items. The main list area has a header with columns for "School Name" and other filters. A context menu is visible on the right side of the screen, with the "Delete" option highlighted by a red box. Other options in the menu include "New", "Import", and "Change Owner".

## 10. Reports

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

### Create Report:

- 1.In School Management App click Reports tab.
- 2.Click New Report.
- 3.Select the report type as School with students and parents for the report.
- 4.Click start report.

5. Customize your report, then save and run

6. Give report name – Schools with Students Report

7. Click Save

The screenshot shows the Microsoft Dynamics 365 interface for reports. At the top, there is a navigation bar with 'School Management' and dropdown menus for 'Schools', 'Students', 'Parents', 'Reports' (which is highlighted with an orange box), and 'Dashboards'. Below the navigation bar is a search bar with 'Search recent reports...' and a 'New Report' button, which is also highlighted with an orange box. On the left, there is a sidebar titled 'RECENT' with categories 'Created by Me', 'Private Reports', and 'Public Reports'. The main area is currently empty.

The screenshot shows the 'Create Report' dialog box. On the left, there is a sidebar with categories like 'Recently Used' and 'All' (which is selected). Under 'All', there are various report types: 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', 'Price Books, Products and Assets', and 'Administrative Reports'. In the center, there is a search bar with 'sch' typed in it. Below the search bar is a table with columns 'Report Type Name' and 'Category'. The table contains two rows: 'Schools' (Standard) and 'Schools with Students' (Standard). The 'Schools with Students' row is highlighted with an orange box. On the right, there is a 'Details' section for 'Schools with Students', which includes a 'Start Report' button (highlighted with an orange box), a 'Details' link, and a note about 'Fields (28)'. There are also sections for 'Created By You' (No Reports Yet) and 'Created By Others' (No Reports Yet).

The following is the format of the Report for the school:

It contains *Outlines* and *Filters*

In Outlines tab we have- Group Rows, Group Columns.

In the Columns Tab, we have Columns like *School: School Name, Student: Student Name*

Now we have to save the report with the Report Name – “Schools with Students Report”. Click save & run at the top and save it as below:

Save Report

---

\* Report Name  
New Schools with Students Report

Report Unique Name ⓘ

Report Description

Folder  
Private Reports

### View Report:

- 1.Click on App Launcher on left side of screen.
- 2.Search School Management App & click on it.
- 3.Click on Reports Tab.
- 4.Click on School with Students report and see records.

The screenshot shows the application's main interface. On the left, there is an app launcher with a search bar containing "school". Below it, the "School Management" app is listed with a red number "2" next to it. The main content area has a "Home" tab selected, displaying three decorative cards. At the top, there is a navigation bar with tabs: "Setup", "Home", and "Object Manager". Below the navigation bar, there is a secondary navigation bar with tabs: "School Management", "Schools", "Students", "Parents", "Reports", and "Dashboards". The "Reports" tab is highlighted with a red number "3". In the bottom half of the screen, there is a table titled "Recent" under the "Reports" section. The table has columns: "REPORTS", "Report Name", "Description", "Folder", "Created By", "Created On", and "Subscribed". One row is visible, showing "Recent" under "REPORTS", "New Schools with Students Report" under "Report Name", "Private Reports" under "Folder", "Shaik Ruksana" under "Created By", "7/8/2023, 9:08 am" under "Created On", and "Subscribed" under "Subscribed". There are also buttons for "Search recent reports...", "New Report", and "New Folder".

In this way, we have successfully created the *School Management App* and performed all the actions.

## ADVANTAGES & DISADVANTAGES

### **Advantages:**

- 1.Cloud-based
- 2.Integrated Ecosystem
- 3.Customizability
- 4.User-Friendly Interface
- 5.Security and Compliance

### **Disadvantages:**

- 1.Cost
- 2.Learning Curve
- 3.Dependency on Salesforce
- 4.API Limitations
- 5.Data Ownership
- 6.Offline Access
- 7.Limited Customization in Low-Code Solutions

## APPLICATIONS

- 1.Schools and K-12 Institutions
- 2.Colleges and Universities
- 3.Online Learning Platforms
4. Tutoring Centres and Coaching Institutes
5. Non-Profit Educational Initiatives
- 6.Training and Development Programs
7. Vocational Institutes
8. Special Education Programs
9. After-School Programs

## 10. Language Schools

# CONCLUSION

In conclusion, the School Management Application developed on the Salesforce platform offers a comprehensive and efficient solution to streamline administrative tasks and improve communication within educational institutions. Through a user-friendly interface and automation features, the application simplifies attendance tracking, academic management, and examination processes.

# FUTURE SCOPE

The School Management Application in Salesforce has a promising future scope, with several potential enhancements and improvements that can be implemented to further enhance its functionality and impact. Some future enhancements include:

1. Mobile Application
2. Artificial Intelligence Integration
3. Learning Management System (LMS) Integration
4. Parent-Teacher Conference Scheduling
5. Alumni Management
6. Financial Aid and Scholarship Management
7. Classroom IoT Integration
8. Gamification and Rewards
9. Virtual Reality (VR) and Augmented Reality (AR) Support
10. Predictive Analytics for Student Success
11. Multilingual Support
12. Voice Assistant Integration

# THANK YOU