



Creation of application for School management using Salesforce



NAAN MUDHALVAN

PROJECT REPORT

Submitted by

HEMASRI S	(au620120104033)
DEEPIKA K	(au620120104018)
INDHUMATHI S	(au620120104306)
KAVITHA M	(au620120104046)

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ANNA UNIVERSITY :: CHENNAI 600 025

BONAFIDE CERTIFICATE

Certified that this project report “**Creation of application for school management**” is the bonafide work of “**Hemasri S (au620120104033), Deepika K(au6201201043017), Indhumathi S (au620120104306), Kavitha M (au620120104046)**” who carried out the project work under my supervision.

SIGNATURE

HEAD OF THE DEPARTMENT

Prof. V. Meena, M.E.,

Assistant Professor,

Department of CSE,

AVS Engineering College,

Salem- 636003.

SIGNATURE

PROJECT SUPERVISOR

Mr. G. ArokiaNathan, M.E.,

Assistant Professor,

Department of CSE,

AVS Engineering College,

Salem- 636003.

SPOC

HEAD OF THE DEPARTMENT

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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

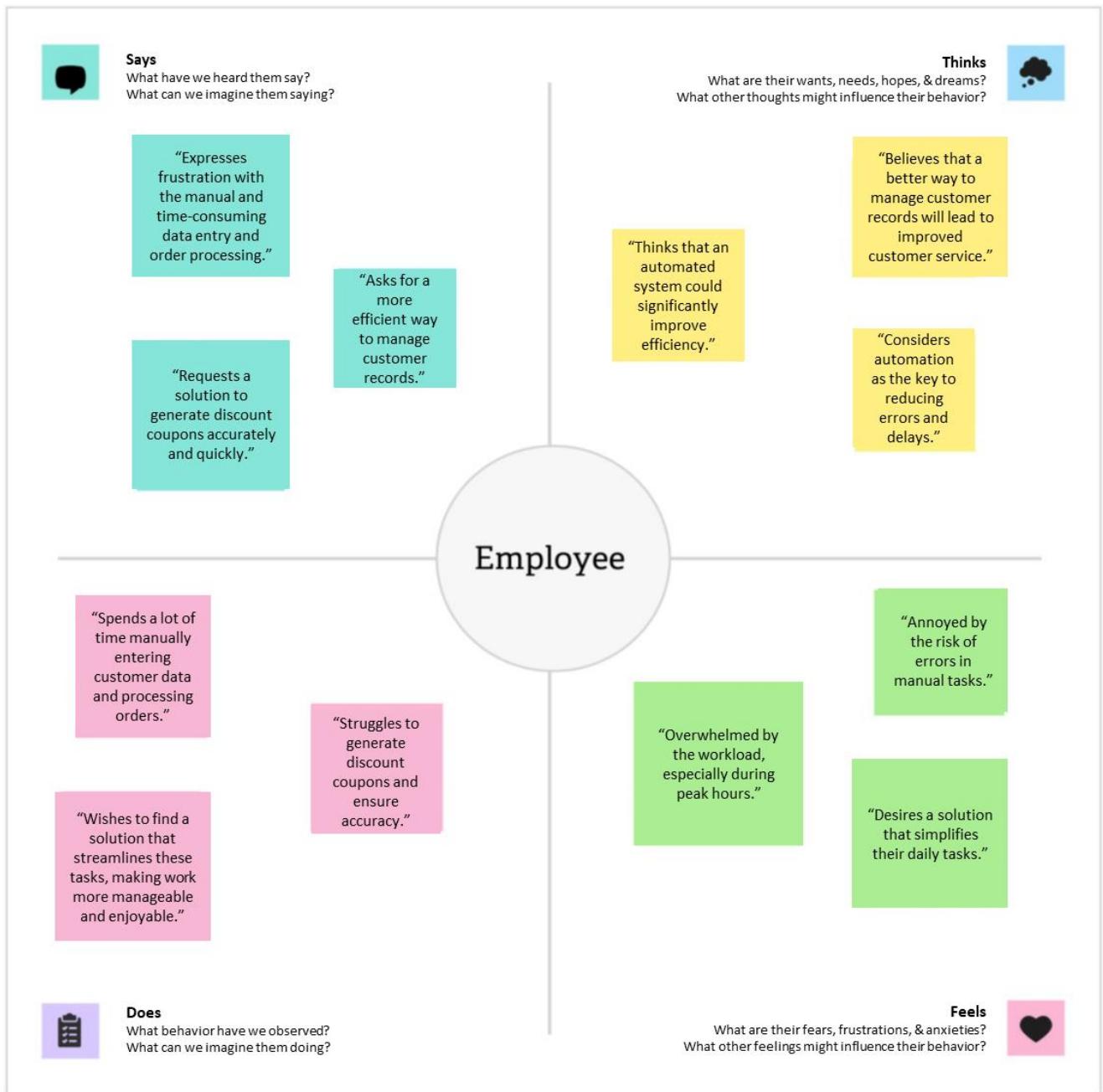
Problem for	Trying to	But	Which makes
Students	Poor communication between parents and school staff is a major problem that contributes to the overall ineffective management of schools.	When parents and teachers are not able to communicate effectively, it can have a negative impact on the entire school 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 helps 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

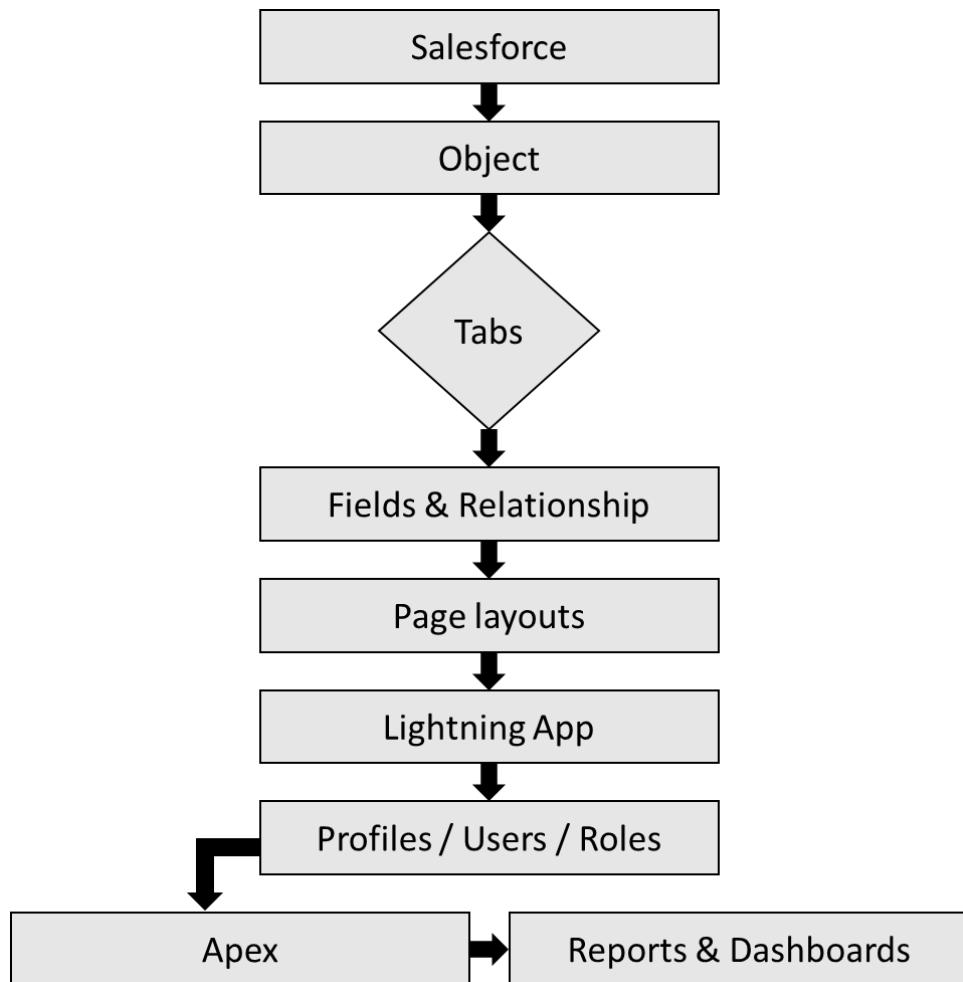
Requirement	Description
Salesforce Developer Org	Create a Salesforce developer org for project development and testing.
Lightning App	Create a Lightning app to brand the application and provide a customized color scheme and logo.
Automation Tools	Use Apex triggers and flows to implement automation in 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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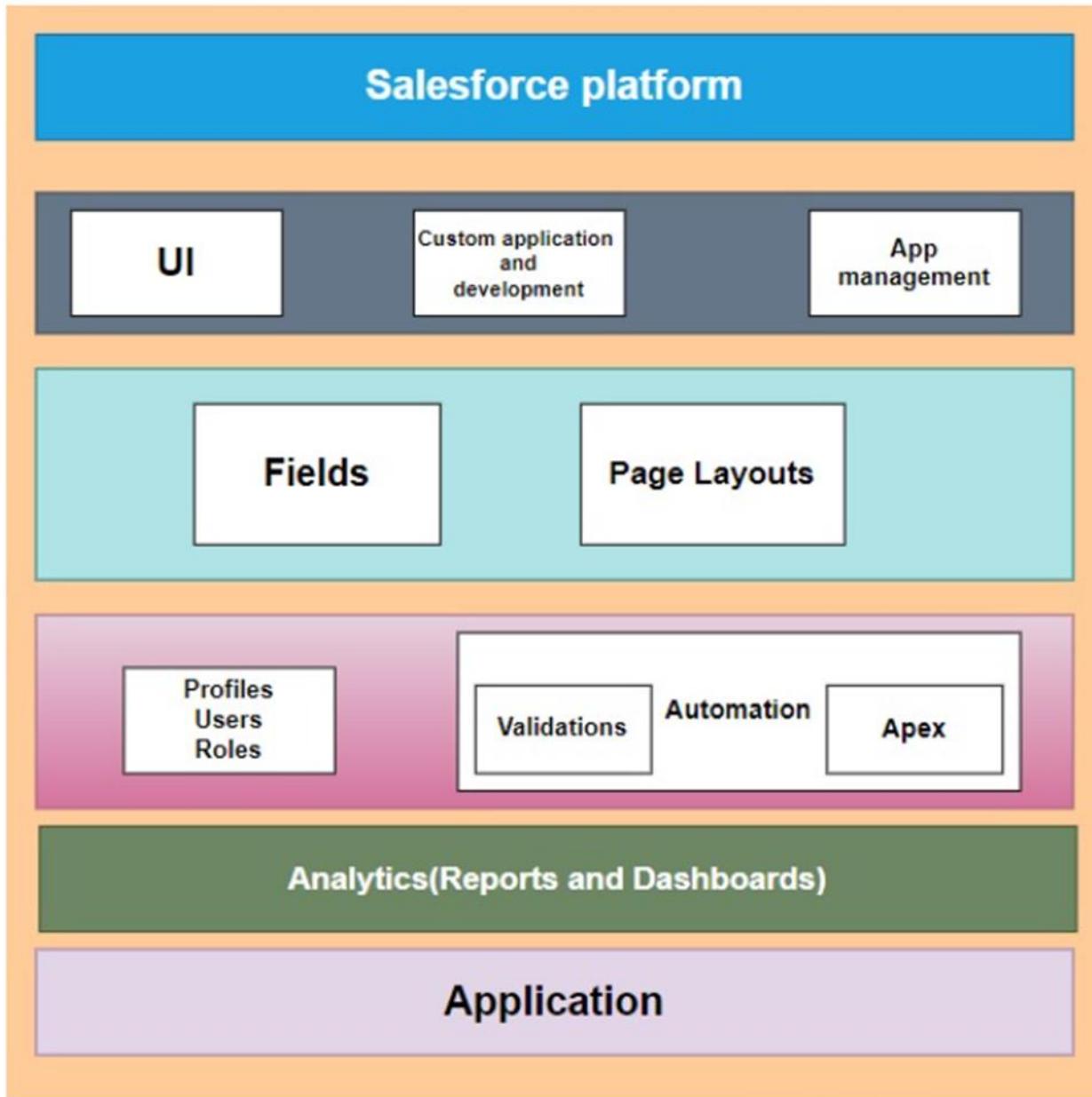
1.7 Project Road Map

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

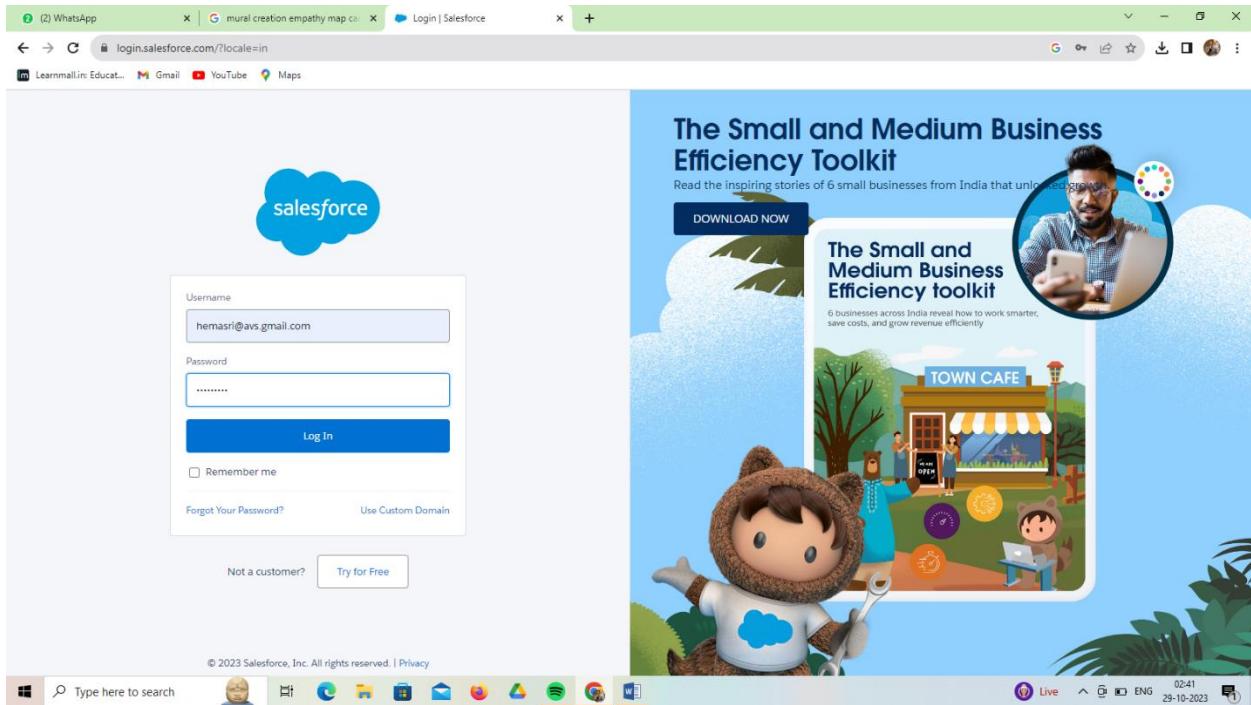
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.

The screenshot shows the Salesforce Developer Portal homepage. 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" and a "Login" button is on the right. Below the navigation, a "Developers" section has links for Home, Documentation, APIs, Discover, Build, and Connect. A prominent blue button on the right says "Browse Trials". The main content area features a large circular graphic of a koala bear with the text "Get release-ready today!" overlaid. Below this, a call-to-action button says "Read it now". To the left, there's a section titled "Latest Developer News" with a Windows taskbar visible at the bottom.

The screenshot shows the "Explore Lightning Platform" landing page. It features a dark background with a grid of icons related to cloud computing, AI, and developer tools. Overlaid on this is a monitor displaying the Salesforce Developer Portal interface. Text on the page reads: "Explore Lightning Platform, the fastest way to create enterprise cloud apps". To the right, there's a "salesforce lightning platform" logo and a call-to-action: "Get your very own Developer Edition. A full-featured copy of Lightning Platform, for FREE.". Below this are several input fields for a form: 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.

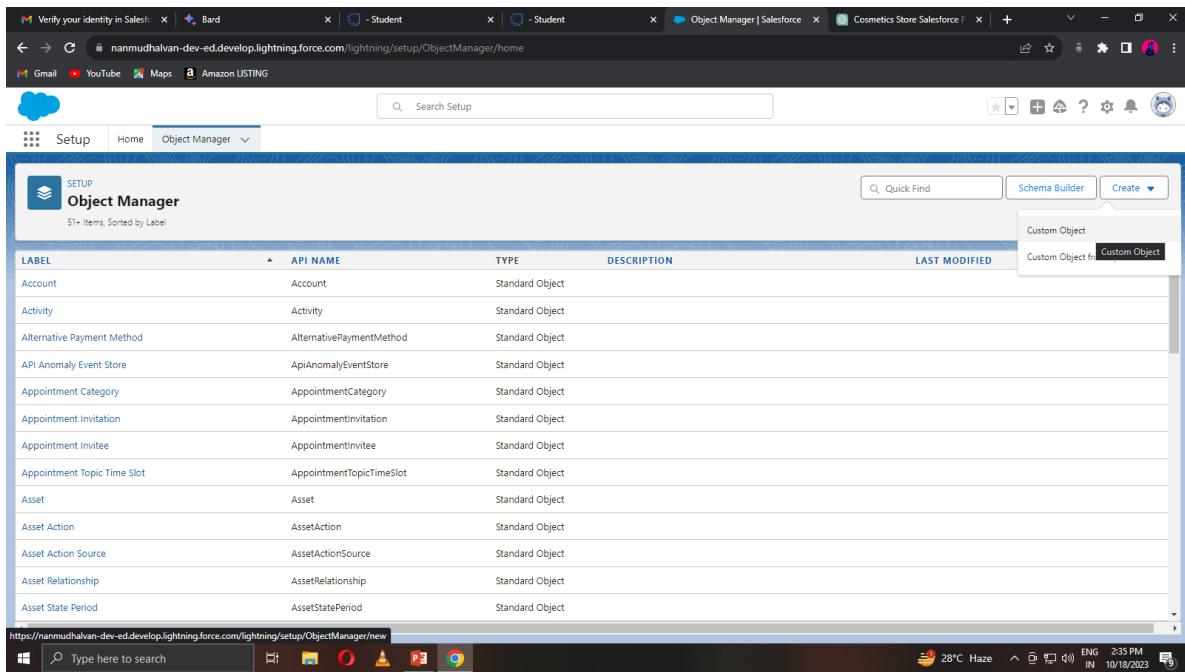


A screenshot of the Salesforce Setup Home page. The left sidebar lists various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Lightning Experience Transition Assistant. The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled 'Most Recently Used' with a table showing items like 'Ajmal Akram' (User) and 'Custom Field Definition'. The bottom of the screen shows the Windows taskbar with various pinned icons.

2.2 Object Creation

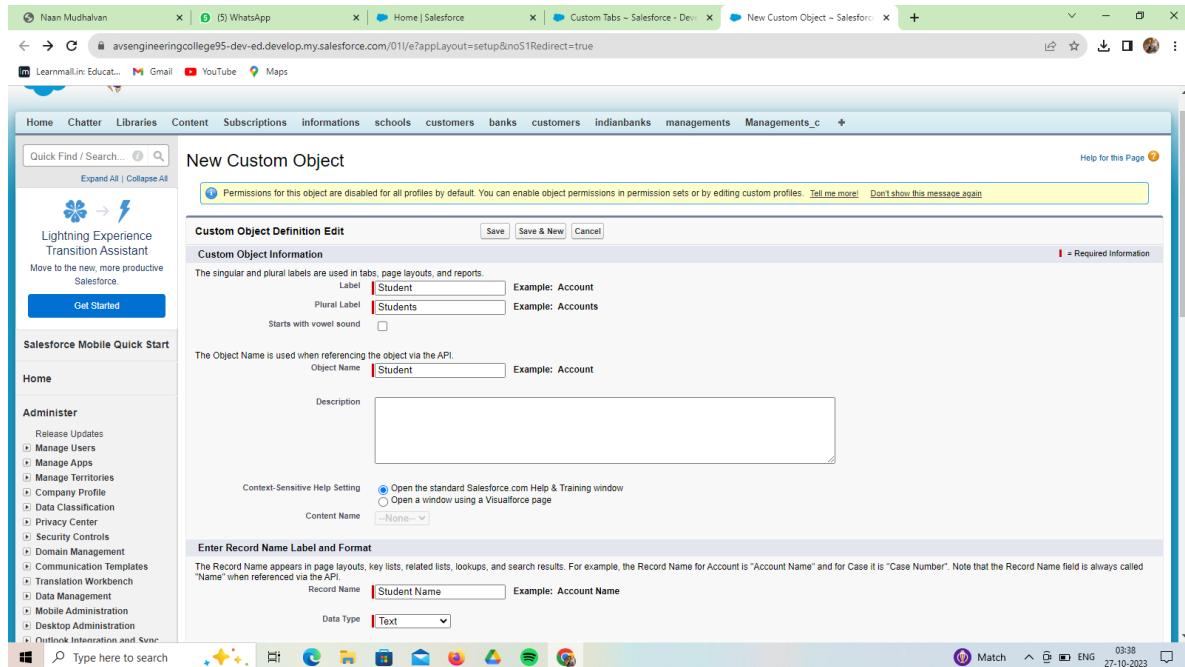
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: Students, Teachers, Parents, Others.

Create the Consultants Object



The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs for Setup, Home, and Object Manager. On the right side of the header, there are buttons for Quick Find, Schema Builder, and Create. A dropdown menu under the Create button shows options for 'Custom Object' and 'Custom Object from'. The main area is a table listing standard objects:

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		



The screenshot shows the 'New Custom Object' page in Salesforce. At the top, there's a message about permissions being disabled by default. Below that is the 'Custom Object Definition Edit' section. It includes fields for 'Label' (Student), 'Plural Label' (Students), and 'Object Name' (Student). There's also a 'Description' field and a 'Context-Sensitive Help Setting' section with options for standard help or a Visualforce page. At the bottom, there's a section for 'Enter Record Name Label and Format' with fields for 'Record Name' (Student Name) and 'Data Type' (Text).

Create the Retailers Object

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Edit Custom Object: MySchool
- Object Name:** MySchool (Label) and MySchools (Plural Label)
- Description:** A large empty text area for entering a description.
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected).
- Content Name:** None
- Enter Record Name Label and Format:** Record Name: School Name (Example: Account Name), Data Type: Text

Create the Others Object

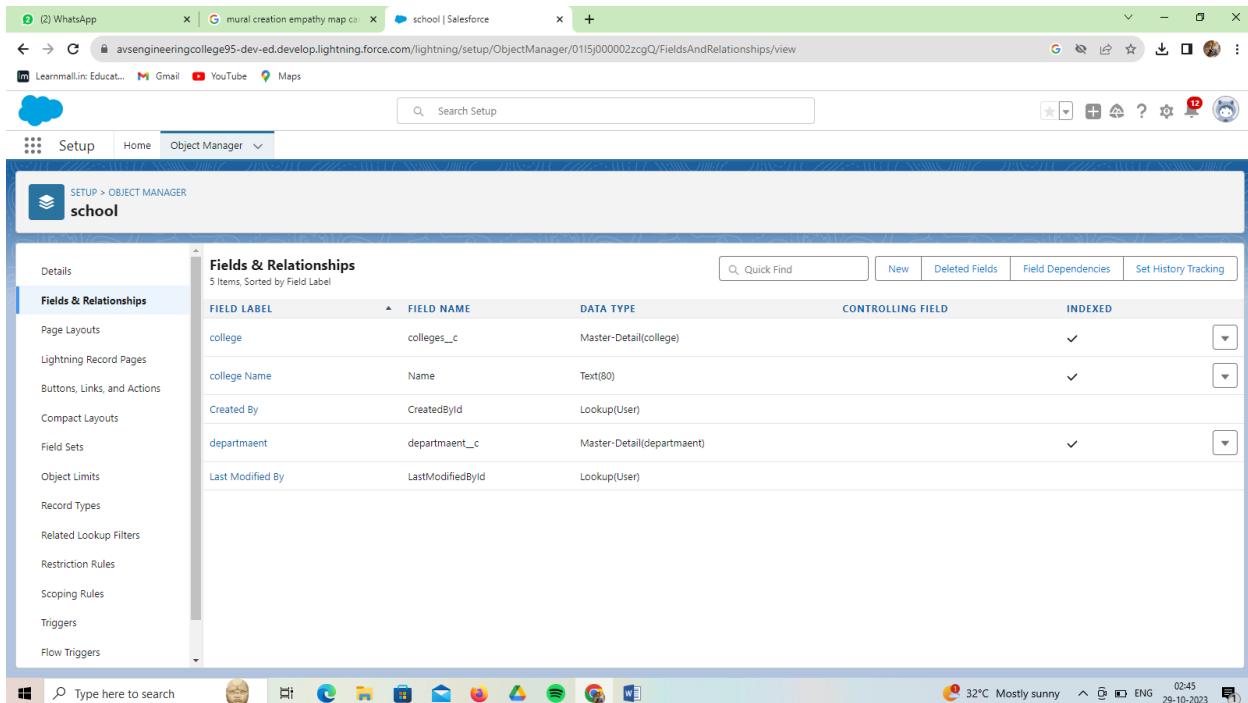
The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Edit Custom Object: Parent
- Object Name:** Parent (Label) and Parents (Plural Label)
- Description:** A large empty text area for entering a description.
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected).
- Content Name:** None
- Enter Record Name Label and Format:** Record Name: Parent Name (Example: Account Name), Data Type: Text

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.

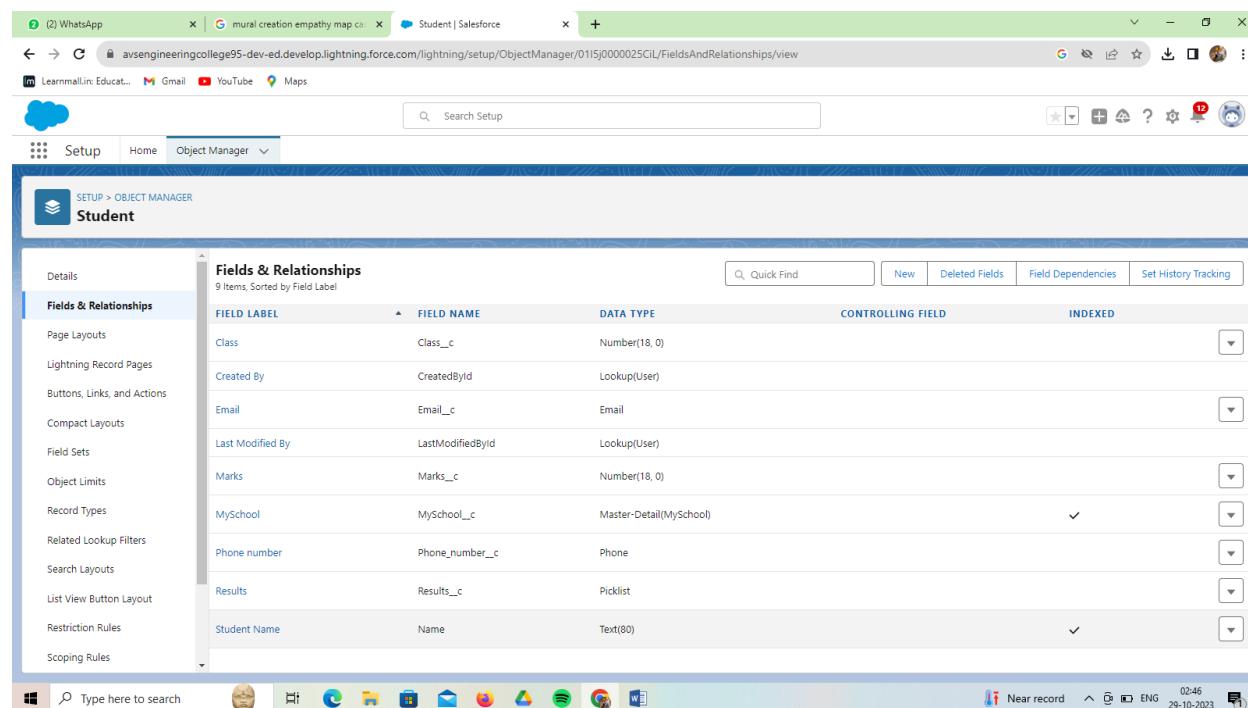
Fields in School Objects



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

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

Fields in Student Objects



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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Number(18, 0)		
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedBy	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 content 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	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 like Page Layouts, Lightning Record Pages, and Field Sets. The main content 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
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' list for the 'MySchool' object. The list contains one item: 'MySchool Layout'. The details for this layout are shown in the center pane:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
MySchool Layout	Hemasri S, 27/10/2023, 3:46 pm	Hemasri S, 28/10/2023, 12:05 pm

The top right of the page has a 'Quick Find' search bar, a 'New' button, and a 'Page Layout Assignment' link. The bottom right shows system status: 32°C Mostly sunny, 02:48, ENG, 29-10-2023.

The screenshot shows the Salesforce Object Manager interface for the 'consultant' object. The left sidebar is collapsed, and the main area displays the 'Page Layouts' list for the 'consultant' object. The list contains one item: 'consultant Layout'. The details for this layout are shown in the center pane, with the 'Layout Properties' tab selected. The layout editor shows the following fields:

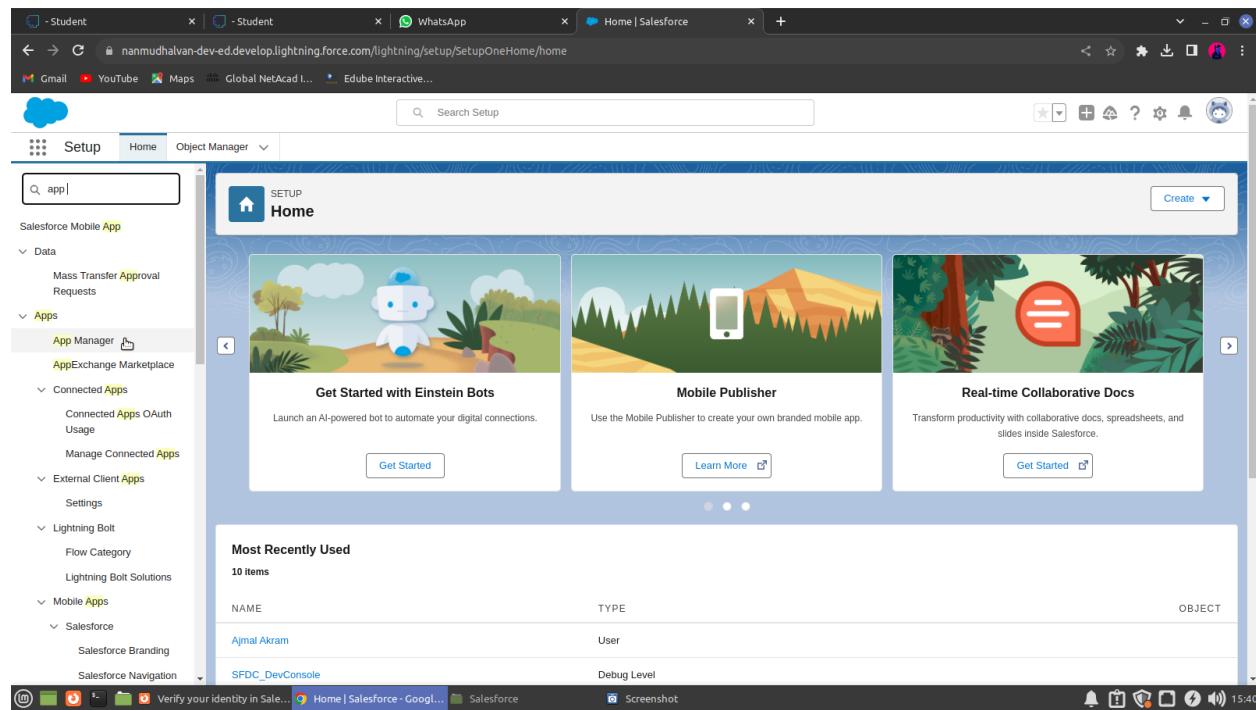
Field Name	Type	Description
consultant_number	Text	Delivery type
consultant_name	Text	Last Modified By
consultant_mail	Text	our customer
customer_id	Text	Owner

The top right of the page has a 'Custom Console Components' link, a 'Mini Page Layout' link, a 'Mini Console View' link, a 'Video Tutorial' link, and a 'Help for this Page' link. The bottom right shows system status: 32°C Mostly sunny, 02:48, ENG, 29-10-2023.

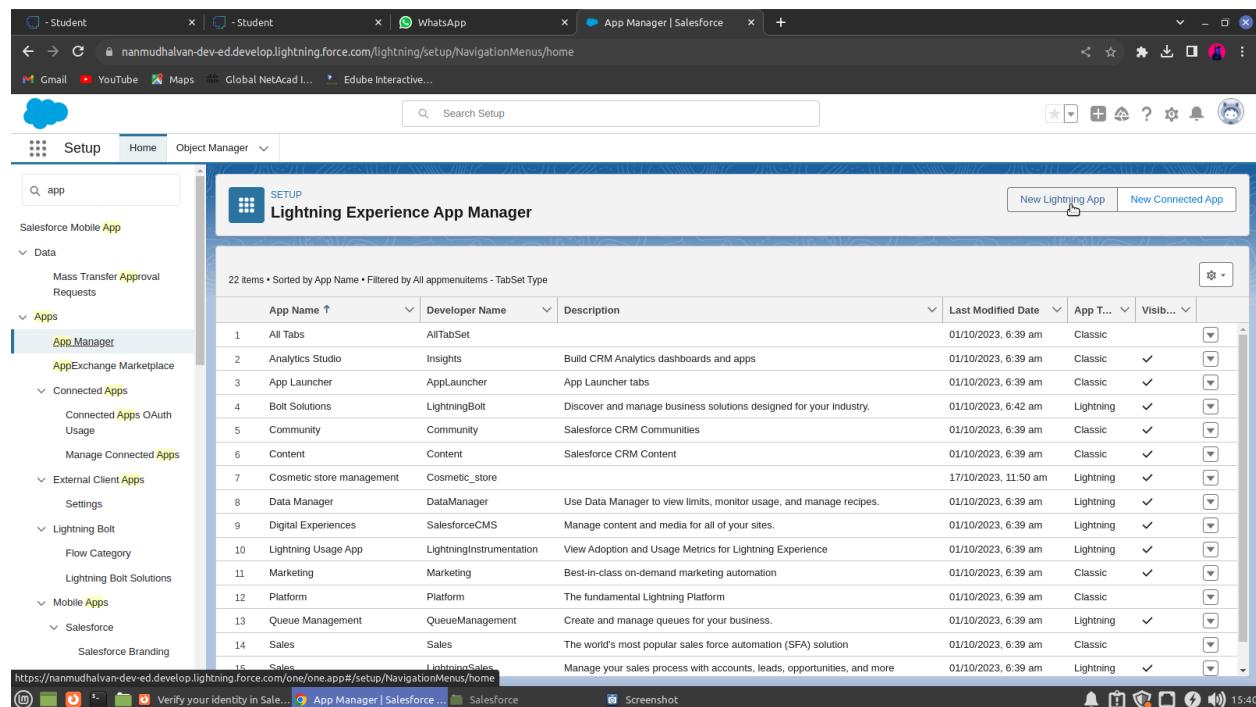
2.5 The Lightning App

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. The left sidebar is open, showing the 'App Manager' section under 'Apps'. The main content area displays the 'Home' app setup page. It features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing two items: 'Ajmal Akram' (User) and 'SFDC_DevConsole' (Debug Level). The top right corner has a 'Create' button.



The screenshot shows the Lightning Experience App Manager page. The left sidebar is open, showing the 'App Manager' section under 'Apps'. 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. The table lists various built-in and custom apps like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Cosmetic store management, Data Manager, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, Sales, and Sales.

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

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: Upload
- Primary Color Hex Value: #0070D2

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

App Launcher Preview:

Next

Type here to search

32°C Mostly sunny 02:51 29-10-2023

- Student - Student WhatsApp App Manager | Salesforce

New Lightning App

App Options

Navigation and Form Factor

- * Navigation Style: Standard navigation (selected)
- Console navigation

Supported Form Factors

- Desktop and phone (selected)
- Desktop
- Phone

Setup and Personalization

Setup Experience

- Setup (full set of Setup options) (selected)
- Service Setup

App Personalization Settings

- Disable end user personalization of nav items in this app
- Disable temporary tabs for items outside of this app

Back Next

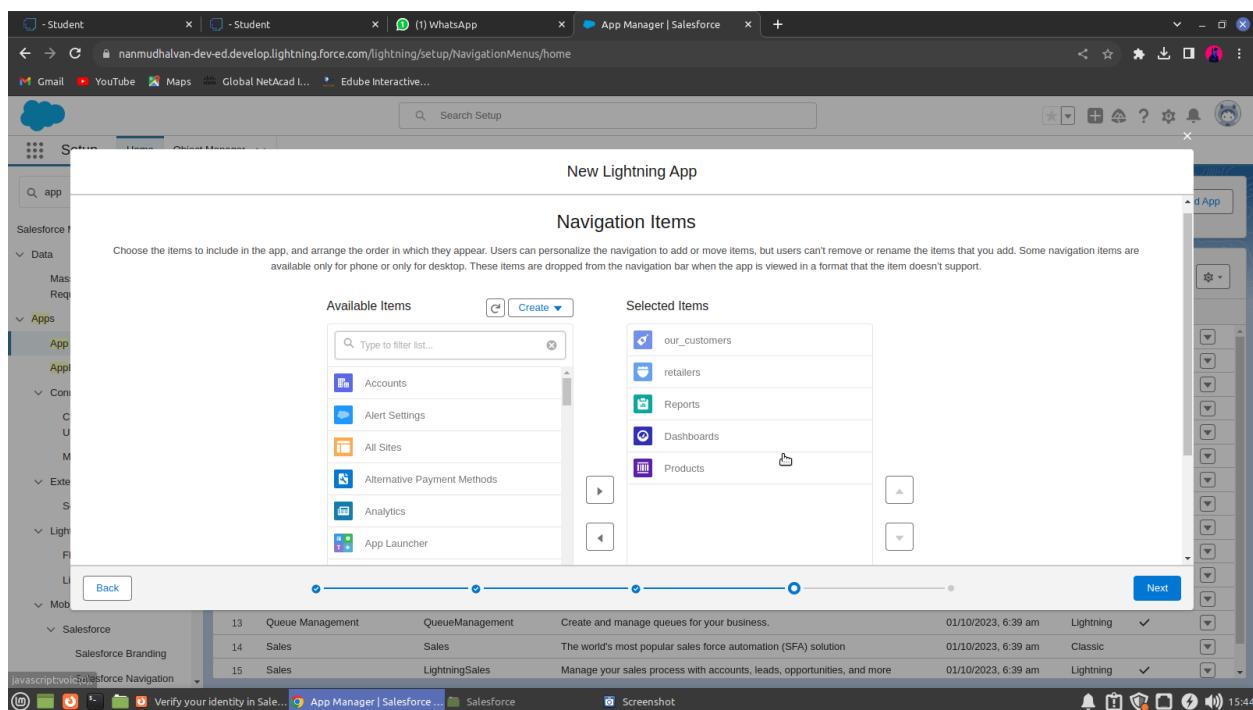
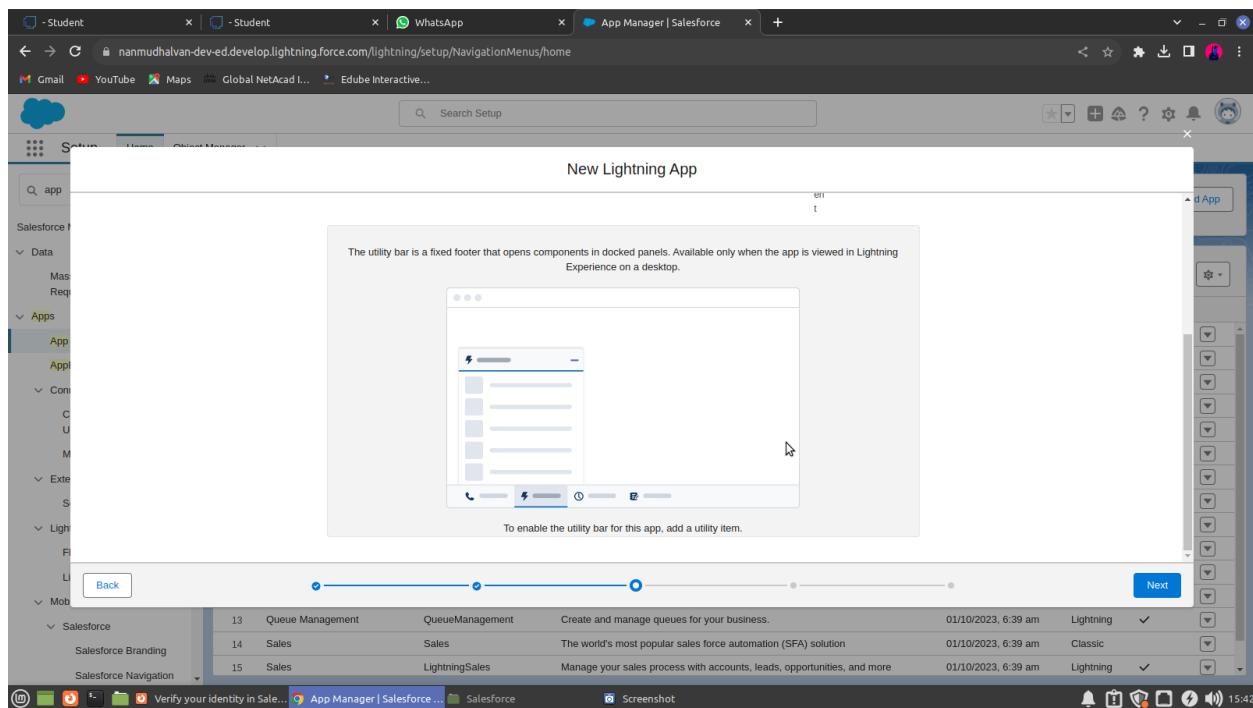
Queue Management QueueManagement Create and manage queues for your business. 17/10/2023, 10:43 am Lightning ✓

Sales Sales The world's most popular sales force automation (SFA) solution 17/10/2023, 10:43 am Classic ✓

Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more 01/10/2023, 6:39 am Lightning ✓

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

15:42



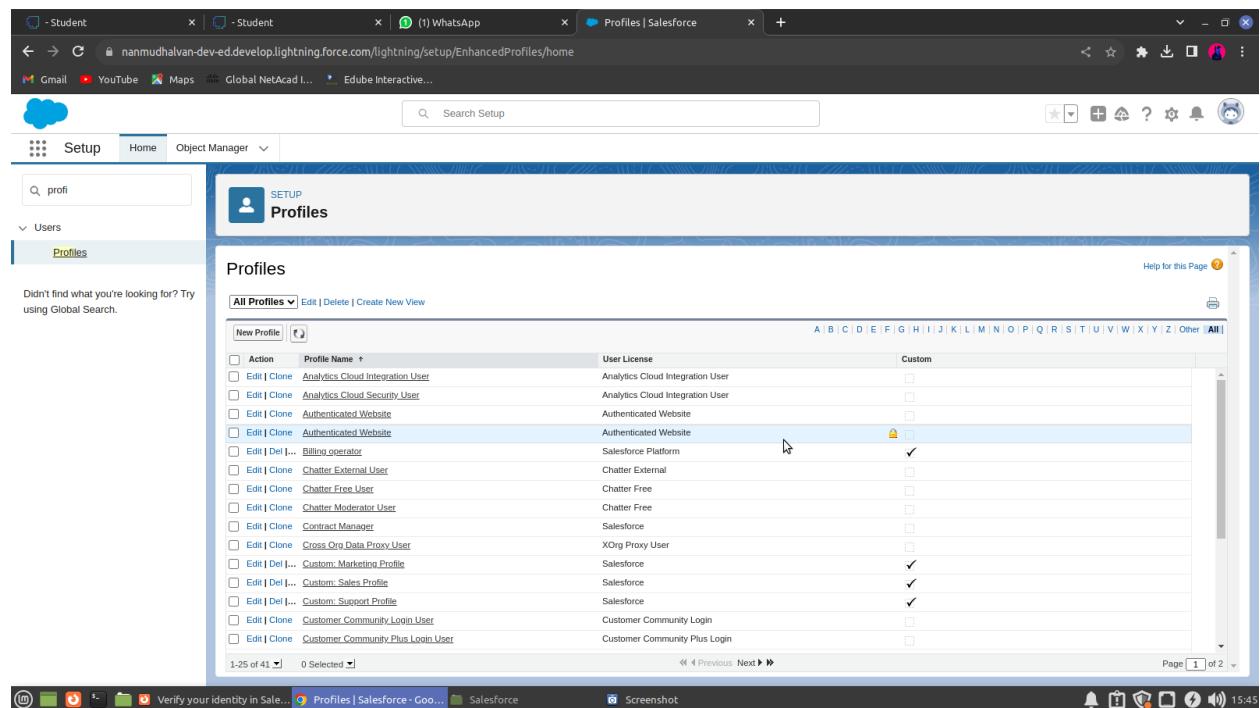
CHAPTER-3

USERS & DATA SECURITY

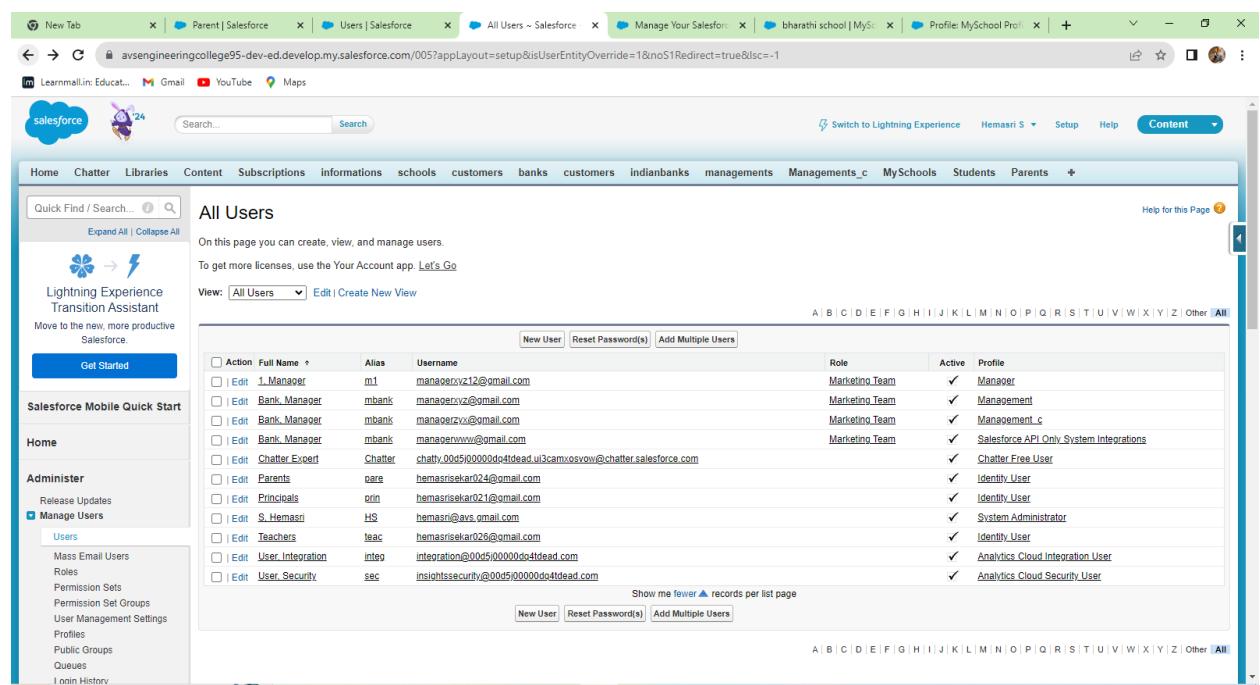
3.1 Profile

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 'Profiles' tab selected under 'Users'. The main area displays a list of profiles with columns for Action, Profile Name, User License, and Custom. The 'User License' column lists various Salesforce licenses including Analytics Cloud Integration User, Authenticated Website, Salesforce Platform, Chatter External, Chatter Free, Chatter Free, Salesforce, XOrg Proxy User, Salesforce, Salesforce, Customer Community Login, and Customer Community Plus Login. The 'Custom' column contains checkboxes, many of which are checked. At the bottom of the list, there are buttons for 'New Profile' and 'Edit | Clone'. The top navigation bar includes links for Home, Object Manager, and a search bar labeled 'Search Setup'.



The screenshot shows the Salesforce Home page with the 'All Users' tab selected under 'Content'. The main area displays a list of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Role' column lists Marketing Team, Marketing Team, Marketing Team, Marketing Team, Chatter Free User, Identity User, Identity User, System Administrator, Identity User, and Analytics Cloud Integration User. The 'Active' column contains checkboxes, many of which are checked. The 'Profile' column lists Manager, Management, Management_c, Salesforce API Only_System Integrations, Chatter Free User, Identity User, Identity User, System Administrator, Identity User, and Analytics Cloud Security User. The top navigation bar includes links for Home, Chatter, Libraries, Content, Subscriptions, Informations, schools, customers, banks, customers, Indian Banks, Managements, Managements_c, MySchools, Students, Parents, and a 'Get Started' button. The left sidebar shows the 'Salesforce Mobile Quick Start' section with links for Home, Administer, Release Updates, Manage Users, Mass Email Users, Roles, Permission Sets, User Management Settings, Profiles, Public Groups, Queues, and Login History.

To create a new profile (Store Supervisor)

The screenshot shows the 'Clone Profile' page in the Salesforce interface. The left sidebar is open, showing the 'Administrator' section with 'Manage Users' selected. The main content area displays a form titled 'Clone Profile' with the instruction 'Enter the name of the new profile.' A note says 'You must select an existing profile to clone from.' A dropdown menu shows 'Existing Profile: Standard Platform User' and 'User License: Salesforce Platform'. The 'Profile Name' field contains 'Management'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Management_c' profile details page. The left sidebar is open, showing the 'Administrator' section with 'Manage Users' selected. The main content area displays the 'Profile Detail' section for 'Management_c'. It shows the profile is a 'Standard Platform User' with 'Salesforce Platform' as the user license. The 'Custom Profile' checkbox is checked. Below this, the 'Page Layouts' section lists various standard object layouts like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc., each with their respective layout names and descriptions. At the bottom right, there are links for 'Object Milestone Layout', 'Operating Hours Layout', 'Order Layout', 'Order Product Layout', 'Payment Layout', 'Payment Authorization Layout', and 'Payment Authorization Adjustment Layout'.

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... Edube Interactive...

Search Setup

Setup Home Object Manager

Profiles

Name: Store Supervisor

User License: Salesforce

Description:

Custom Profile: ✓

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AltTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Cosmetic store management (Cosmetic__store)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__DX)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing (standard__Marketing)	<input type="checkbox"/>	<input type="radio"/>	Work (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>

Required Information: ✓

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot 15:48

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... Edube Interactive...

Search Setup

Setup Home Object Manager

Profiles

Custom Object Permissions

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

Session Settings

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

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot 15:48

Profiles

Fragrance products

Inventories

Others

retailers

Skincare products

Students

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

Obscure 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

To create a new profile (management Operator)

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User

User License: Salesforce Platform

Profile Name: Billing operator

Save Cancel

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Profiles (selected)
- Profile Name:** Billing operator
- Description:** Didn't find what you're looking for? Try using Global Search.
- Profile Detail:** Name: Billing operator, User License: Salesforce Platform, Description: (empty), 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 and Object Milestone Layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Order, Order Product, Payment, Payment Authorization, and Payment Authorization Adjustment.
- Buttons:** Edit, Done, Delete, View Users.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Profiles (selected)
- Profile Name:** Billing operator
- Description:** Didn't find what you're looking for? Try using Global Search.
- Profile Edit Form:** Name: Billing operator, User License: Salesforce Platform, Description: (empty).
- Custom App Settings:** Analytics Studio (standard_Insights), App Launcher (standard_AppLauncher), Cosmetic store management (Cosmetic_store).
- Service Provider Access:** Tab Settings, Overwrite users' personal tab customizations, Standard Tab Settings.
- Buttons:** Save, Save & New, Cancel.

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... Edube Interactive...

Cloud Setup Home Object Manager Search Setup

Profile

Profiles

consultants

Favorites

Fragrance products

Inventories

Others

our_customers

Properties

retailers

Skincare products

Students

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

Obscure secret answer for password resets

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

Verify your identity in Sale... Profiles | Salesforce - Goo... Salesforce Screenshot 15:50

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... Edube Interactive...

Cloud Setup Home Object Manager Search Setup

Profile

Profiles

Fragrance products

Inventories

Others

retailers

Skincare products

Students

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

Obscure 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 Sale... 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 interface with the 'Roles' page open. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Users' (with 'Roles' selected), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts', 'Contact Roles on Opportunities', and 'Case Teams' sections), 'Service', and 'Case Teams'. A note at the bottom of the sidebar says 'Didn't find what you're looking for? Try using Global Search.' The main content area has a title 'Understanding Roles' and a sub-section 'Sample Role Hierarchy' titled 'Territory-based Sample'. It displays a hierarchical diagram:

```
graph TD; CEO[CEO President] --> CFO[CFO VP, Sales]; CFO --> WSD[Western Sales Director]; CFO --> ESD[Eastern Sales Director]; CFO --> ISD[International Sales Director]; WSD --> WSRep1[Western Sales Rep]; WSD --> WSRep2[Western Sales Rep]; ESD --> ESRep1[Eastern Sales Rep]; ESD --> ESRep2[Eastern Sales Rep]; ISD --> ISRep1[International Sales Rep]; ISD --> ISRep2[International Sales Rep]; WSRep1 --> CARep[CA Sales Rep]; WSRep1 --> ORRep[OR Sales Rep]; ESRep1 --> NYRep[NY Sales Rep]; ESRep1 --> MAREp[MA Sales Rep]; ISRep1 --> ASRep[Asian Sales Rep]; ISRep1 --> ESRRep[European Sales Rep]
```

Each role level is described with its permissions: View & edit data, roll up forecasts, & generate reports for all users below; Can't access data of other Executive Staff members; View & edit data, roll up forecasts, & generate reports for users directly beneath; Can't access data of users above or at same level; and View & edit data, roll up forecasts, & generate reports for users directly beneath; Can't access data of users above or at same level.

At the bottom right of the main content area are 'Setup Roles' and 'Don't show this page again' buttons.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Users' (with 'Permission Set Groups' and 'Permission Sets' selected), 'Custom Code', and 'Custom Permissions'. A note at the bottom of the sidebar says 'Didn't find what you're looking for? Try using Global Search.' The main content area has a title 'Permission Set' and a sub-section 'Clone: Salesmanager'. It displays a form to enter permission set information:

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

At the bottom right of the main content area are 'Save' and 'Cancel' buttons.

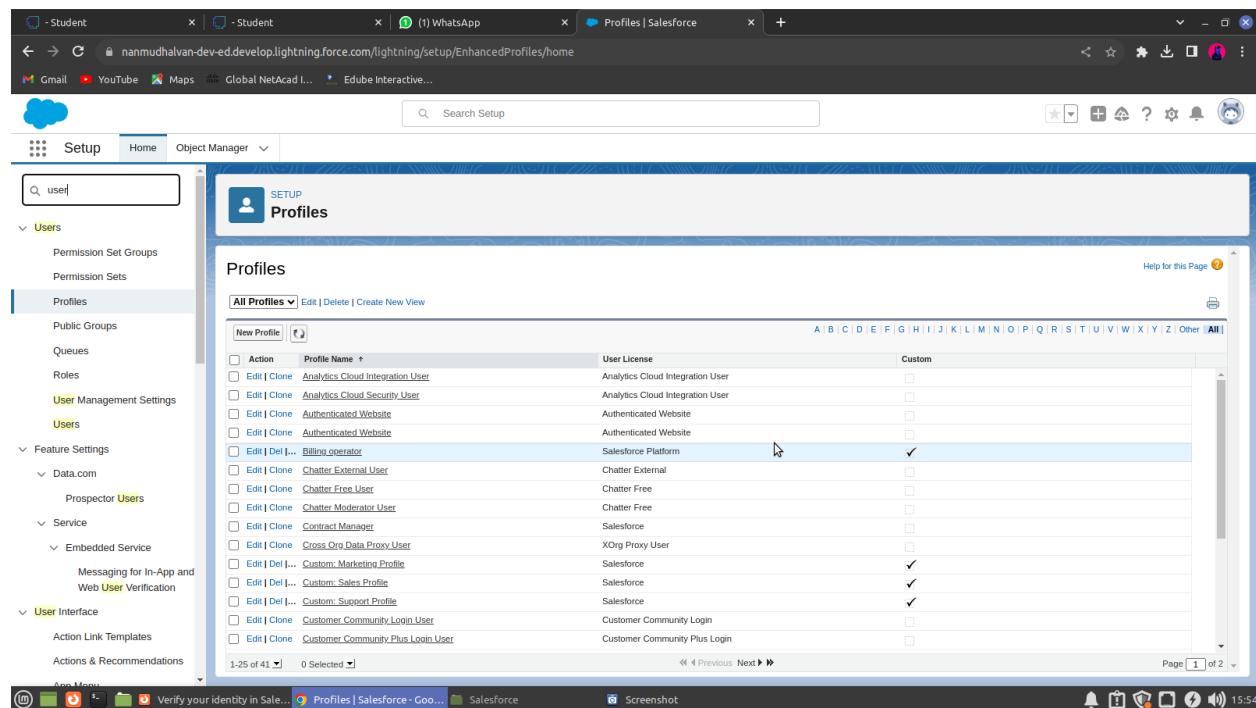
The screenshot shows the Salesforce Lightning Experience interface. On the left, there's a sidebar with various links like Home, Chatter, Libraries, Content, Subscriptions, Informations, schools, customers, banks, Indianbanks, managements, Managements_c, MySchools, Students, Parents, etc. A 'Lightning Experience Transition Assistant' section is also present. The main content area is titled 'New Custom Field' and is on 'Step 2. Enter the details'. It has fields for 'Field Label' (Highest Marks), 'Field Name' (Highest_Marks), 'Description', and 'Help Text'. There's a checkbox for 'Auto add to custom report type' which is checked. At the bottom right of the form are 'Previous', 'Next', and 'Cancel' buttons. The top navigation bar includes 'Switch to Lightning Experience', 'Hemasri S', 'Setup', 'Help', and 'Content'.

The screenshot shows the Salesforce Lightning Experience interface. The left sidebar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Roles' and shows the 'Creating the Role Hierarchy'. It displays a tree structure of roles: Nan mudhalvan (with Add Role, Edit, Del, Assign options), CEO (with Add Role, Edit, Del, Assign), CFO (with Add Role, Edit, Del, Assign), COO (with Add Role, Edit, Del, Assign), Store Head (with Add Role, Edit, Del, Assign), Billing Operator (with Add Role, Edit, Del, Assign), SVP.Customer Service & Support (with Add Role, Edit, Del, Assign), Customer Support, International (with Add Role, Edit, Del, Assign), Customer Support, North America (with Add Role, Edit, Del, Assign), Installation & Repair Services (with Add Role, Edit, Del, Assign), and SVP.Human Resources (with Add Role, Edit, Del, Assign). There are also 'Show in tree view' and 'Help for this Page' buttons. The top navigation bar includes 'Switch to Lightning Experience', 'Hemasri S', 'Setup', 'Help', and 'Content'.

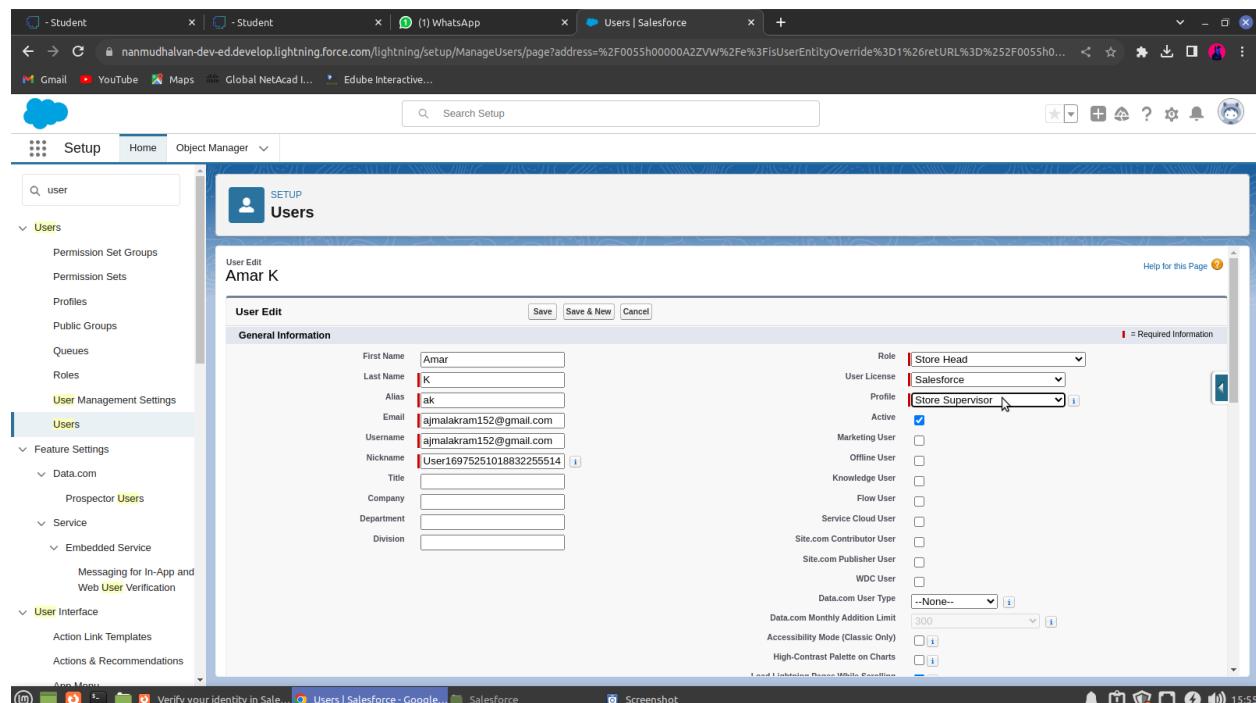
3.3 Users

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 Users

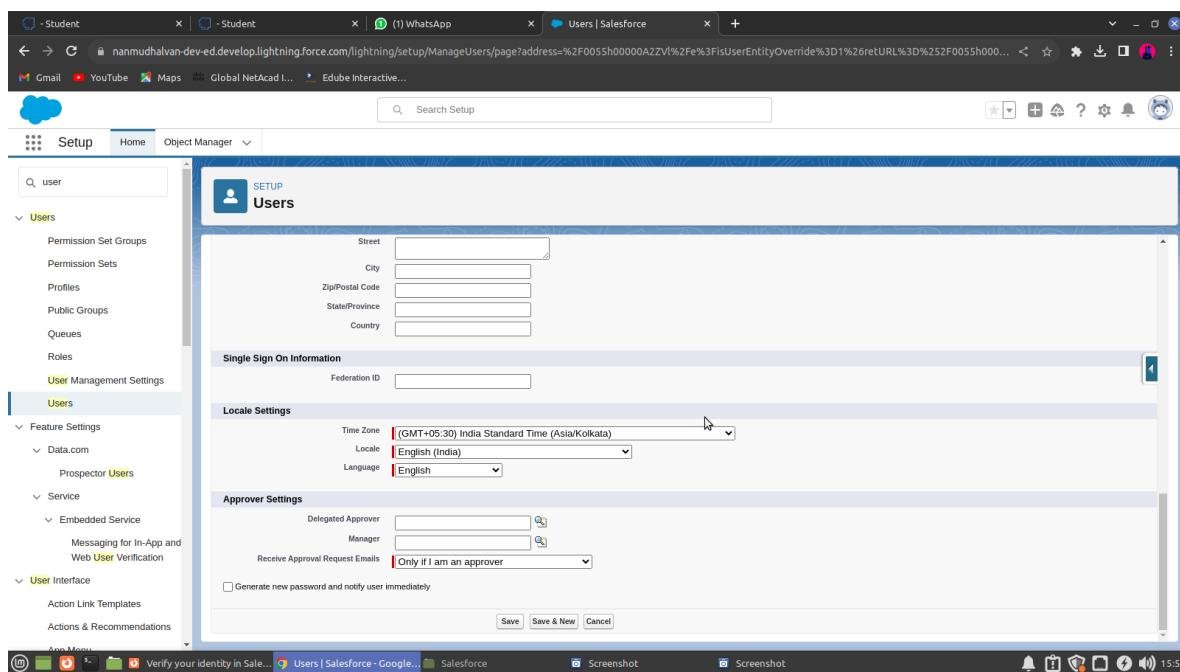
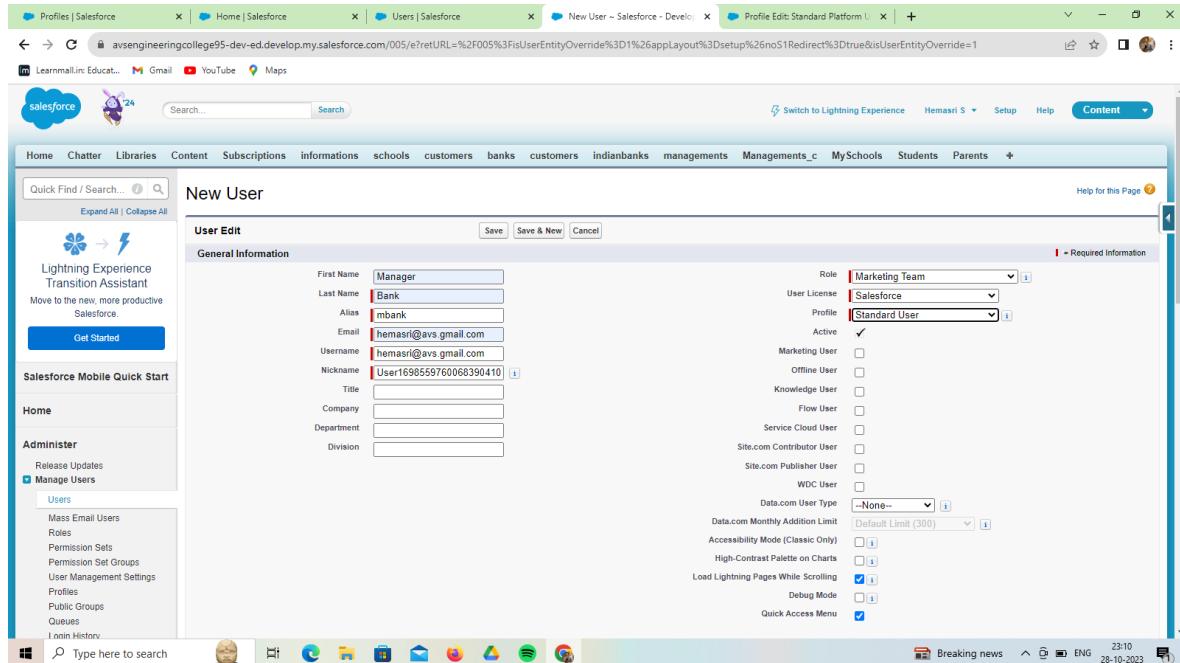


The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes categories like User Management Settings, Feature Settings, Service, and User Interface. The main content area displays a table of profiles, with the 'Billing Operator' profile selected. The table columns include Action, Profile Name, User License, and Custom. The 'Billing Operator' profile is assigned to the 'Salesforce Platform' license and is marked as 'Custom'. Other profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, 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 screenshot shows the Salesforce Setup interface under the Users section. The left sidebar includes categories like User Management Settings, Feature Settings, Service, and User Interface. The main content area shows the 'User Edit' screen for a user named 'Amar K'. The 'General Information' tab is active, displaying 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. On the right side, there are dropdown menus for Role (Store Head), User License (Salesforce), Profile (Store Supervisor), and Active status (checked). Other optional settings include 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). At the bottom, there are links for Data.com Monthly Addition Limit (300), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts.

Creating another Users



Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Akram, Amal	Amra	amalakram152@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty20df90000008ny47eac_0c5euzbkebt@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	K. Amal	ak	amalakram152@gmail.com	Store Head	<input checked="" type="checkbox"/>	Store Supervisor
<input type="checkbox"/>	Teddy, John	tedd	psychoeau1730@gmail.com	Billing Operator	<input checked="" type="checkbox"/>	Billing operator
<input type="checkbox"/>	User, Integration	integ	integration/00d5h0000008ny47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User, Security	sec	insightssecurity@00d5h0000008ny47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

3.4 User Adoption & Approval

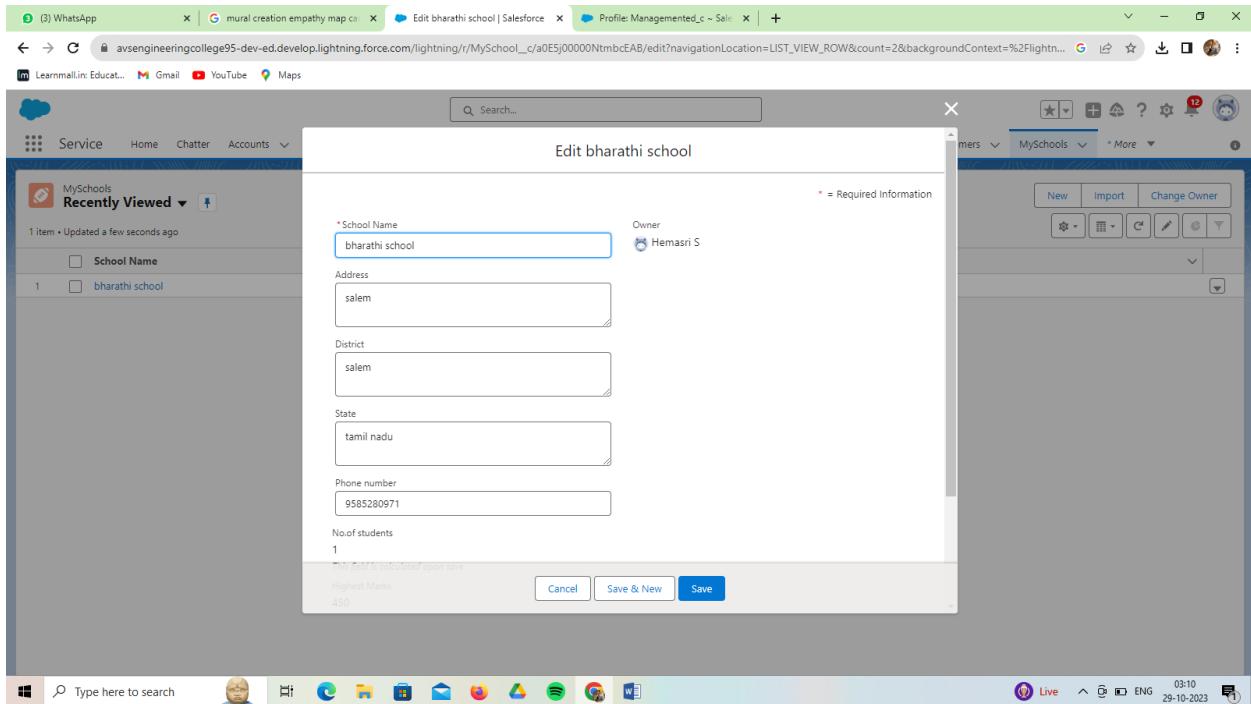
It is the interaction with database and their records.

Create Our Customer Record

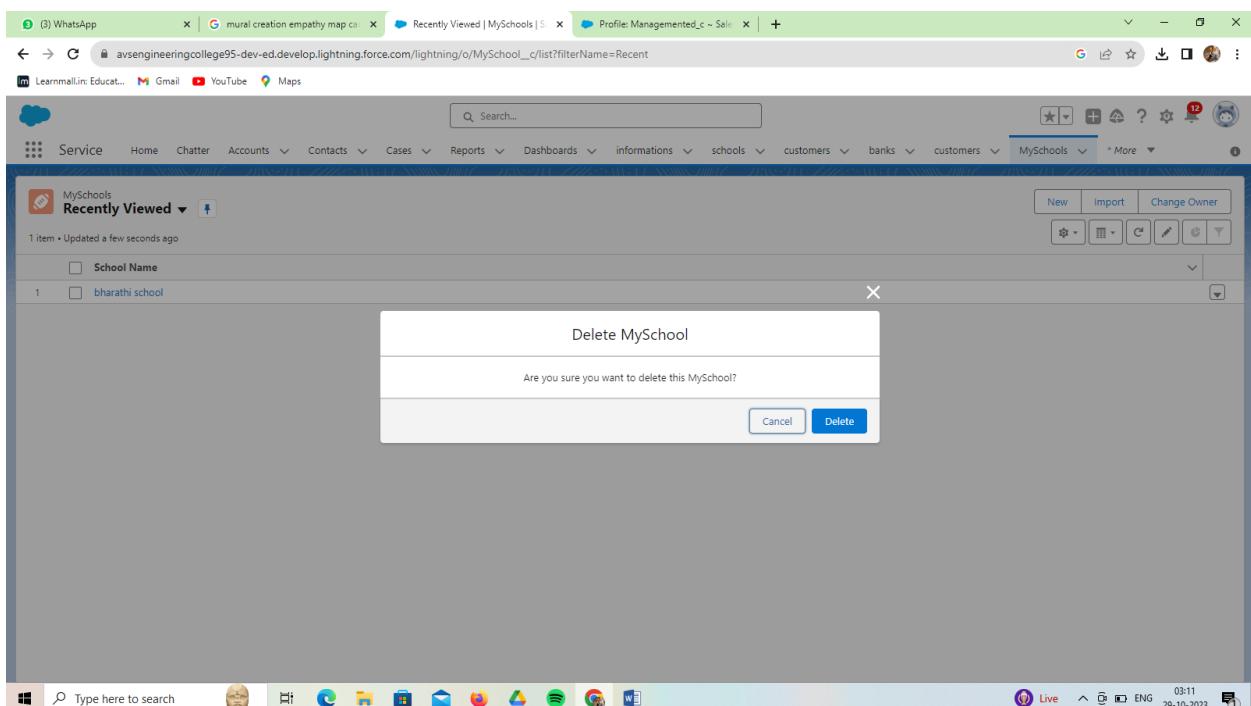
The screenshot shows a Salesforce Lightning interface. At the top, there are tabs for 'Recently Viewed | management...' and 'Edit a035j00000UgDrK | Salesfor...'. The main content area has a green success message: 'information "a035j00000UgDrK" was saved.' Below this, a 'Recently Viewed' section lists one item: '1 item • Updated a few seconds ago' followed by 'a035j00000UgDrK'. The top navigation bar includes links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, colleges, departments, schools, informations, managements, Managements_c, and More. A search bar and various tool icons are also present.

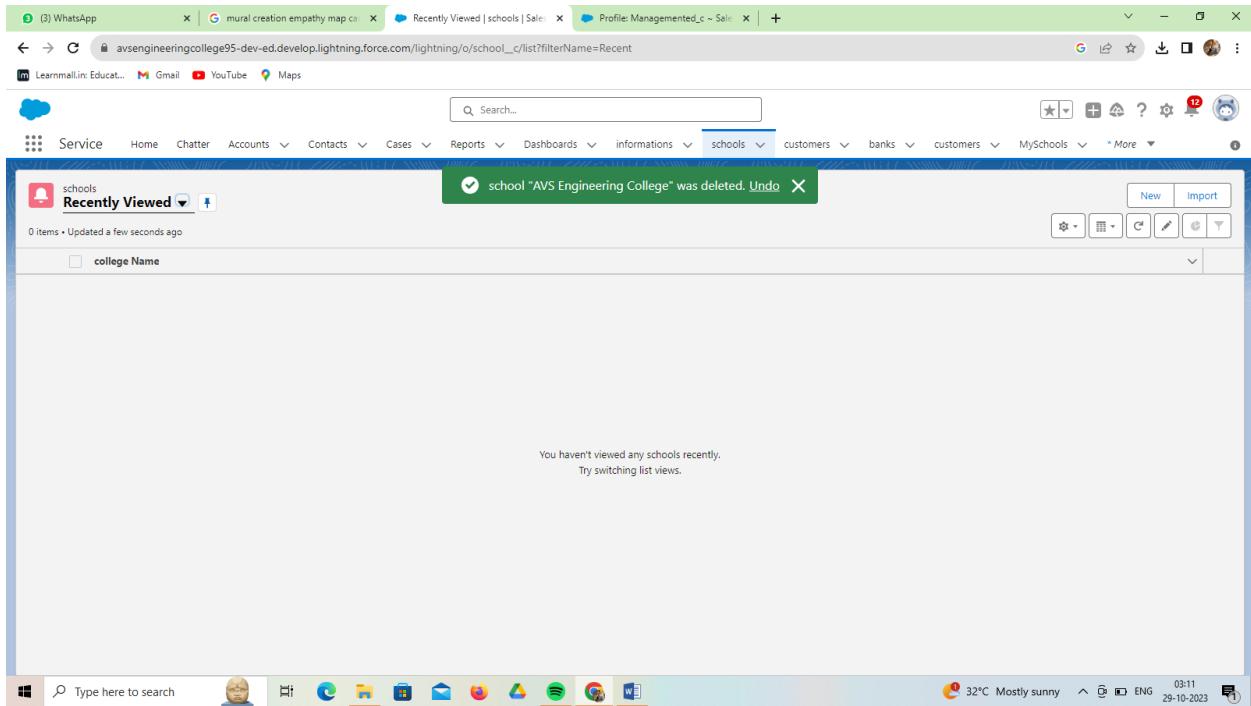
View Record (Our school)

The screenshot shows a Salesforce Lightning interface. The top navigation bar includes links for WhatsApp, mural creation empathy map co, Recently Viewed | MySchools | S, Profile: Managemented_c ~ Sale, Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, informations, schools, customers, banks, customers, MySchools, and More. A search bar and various tool icons are also present. The main content area shows a 'Recently Viewed' section for 'MySchools' with one item: '1 item • Updated a few seconds ago' followed by 'bharathi school'. The status bar at the bottom indicates 'Waiting for avsengineeringcollege-5d-dev-ed.develop.lightning.force.com...', 'Hot weather', '00:27', 'ENG 29-10-2023', and a battery icon.



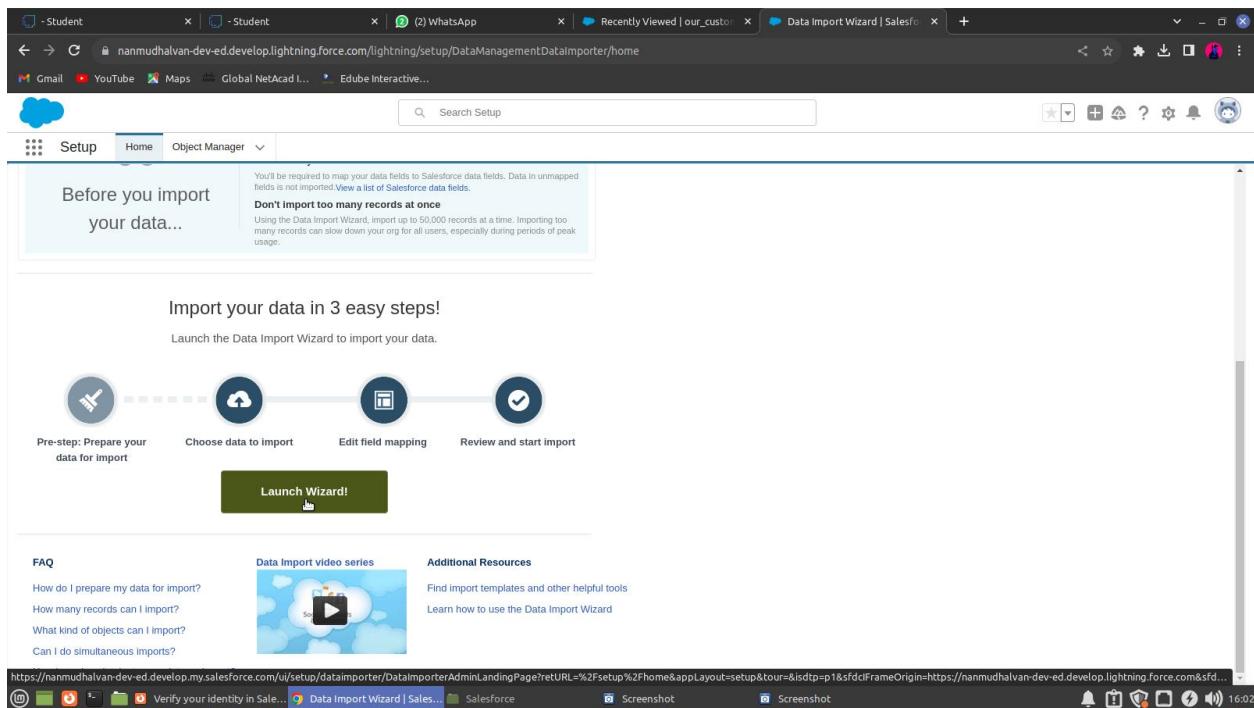
Delete Record (Our school)

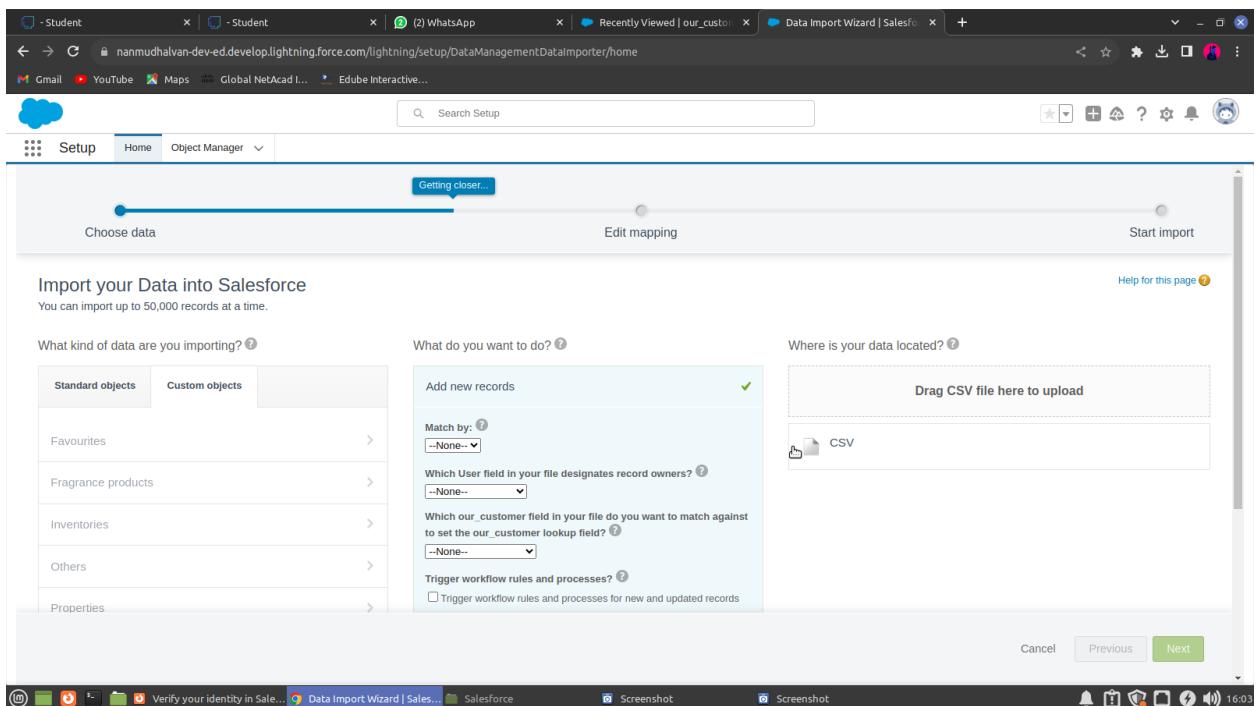




Data Import

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





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 }
```

User	Application	Operation	Time	Status	Read	Size
Hemasri S	Unknown	ApexTestHandler	28/10/2023, 02:20:26	Success	Unread	4.01 KB

Developer Console - Google Chrome
avseengineeringcollege95-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 Go To

```
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

Filter Click here to filter the log list

Type here to search

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

Developer Console - Google Chrome
avseengineeringcollege95-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 Go To

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

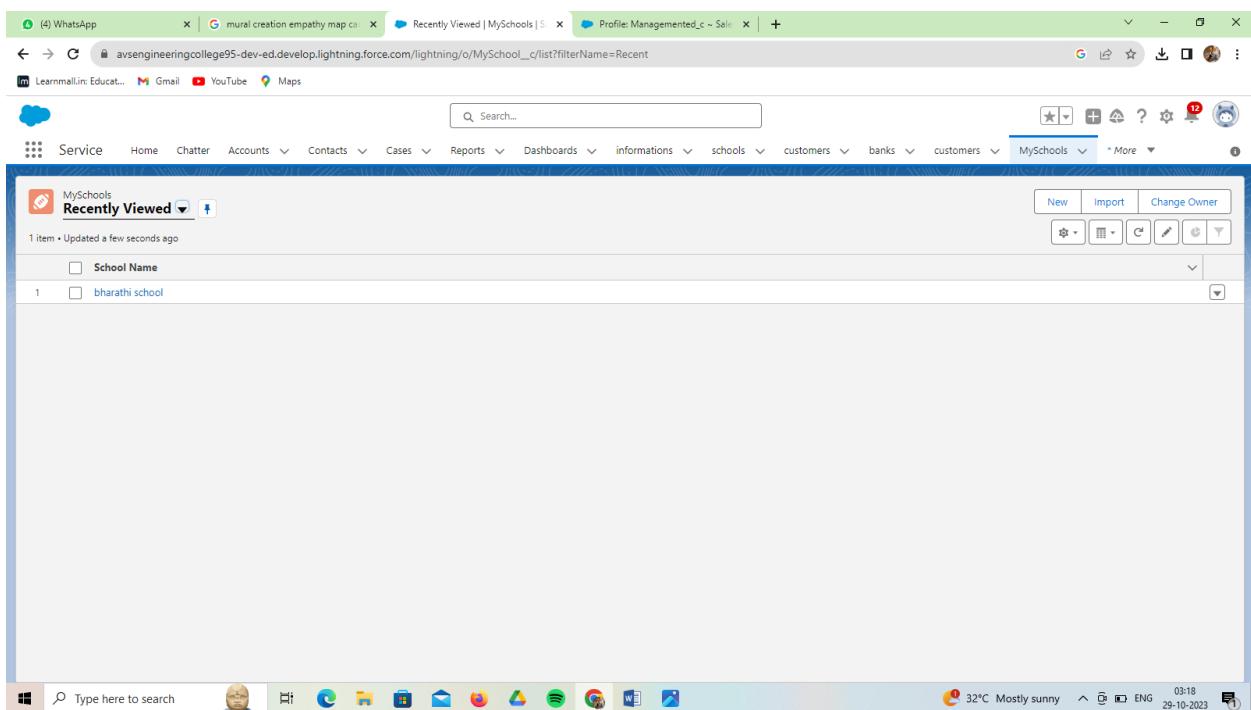
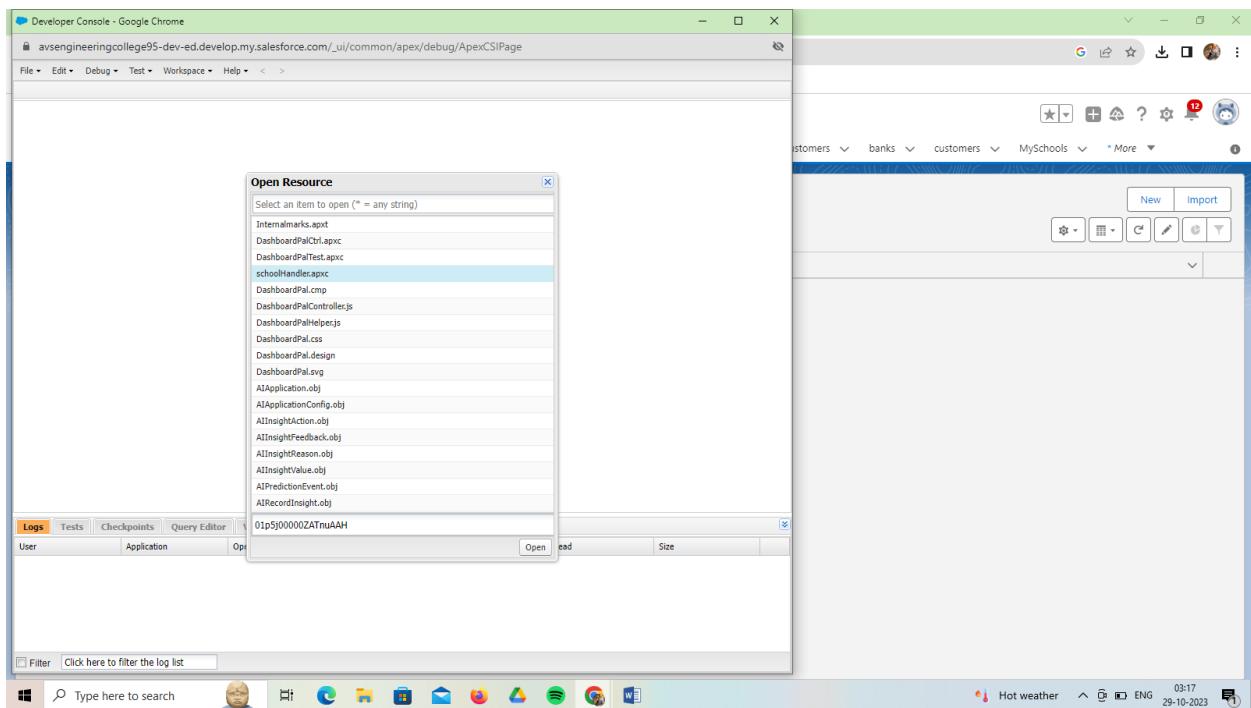
Customers banks customers MySchools More

New Import

Filter Click here to filter the log list

Type here to search

Match 03:14 ENG 29-10-2023

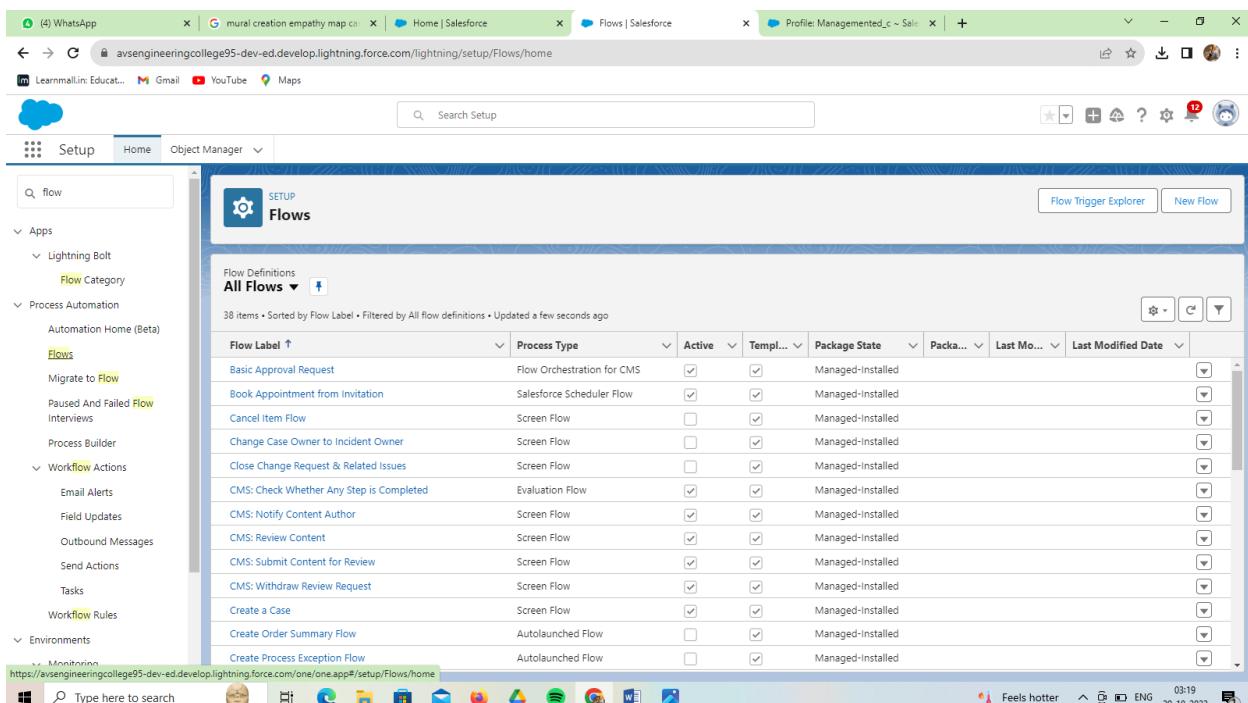


CHAPTER-4

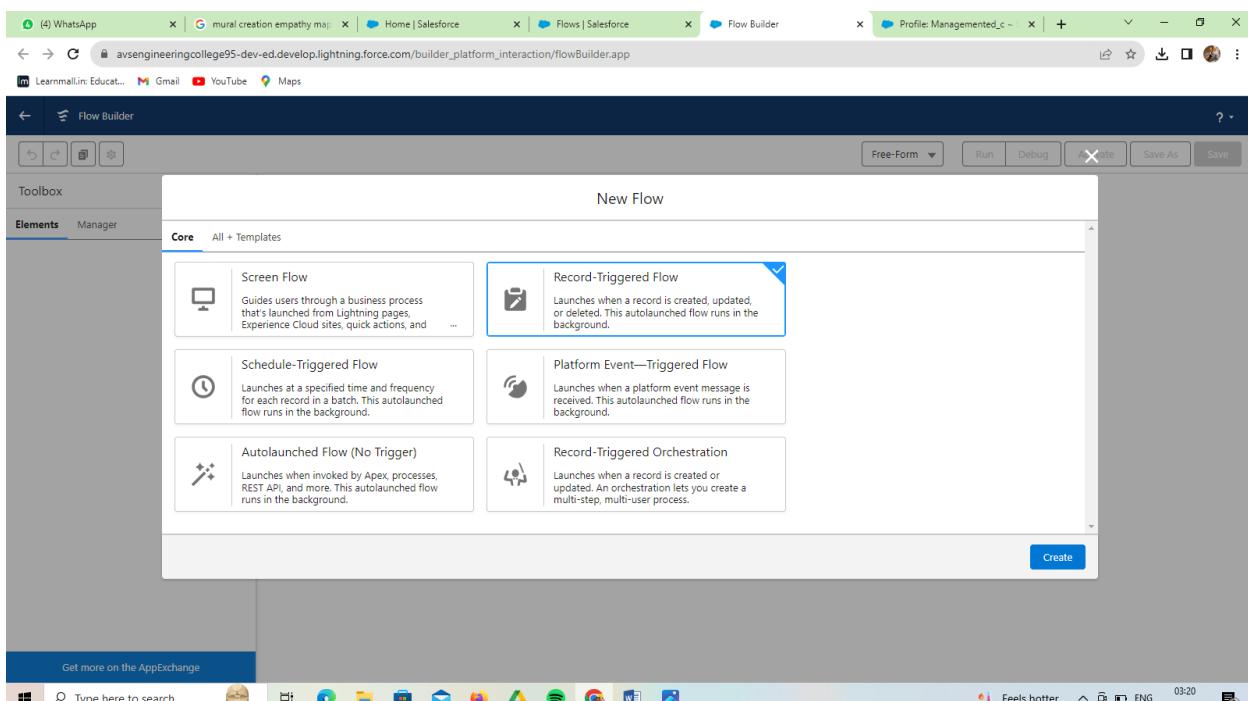
AUTOMATION

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.



This screenshot shows the Salesforce Setup interface for the Flows category. On the left, there's a sidebar with various automation-related options like Lightning Bolt, Process Automation, and Workflow Actions. The main area displays a table titled 'Flow Definitions' with a dropdown for 'All Flows'. The table lists 38 items, each with details such as Flow Label, Process Type, Active status, Template, Package State, and Last Modified Date. The 'Record-Triggered Flow' entry is highlighted with a blue border.



This screenshot shows the Flow Builder interface. At the top, there are tabs for 'Free-Form', 'Run', 'Debug', 'X', 'Save As', and 'Save'. Below that, a 'Toolbox' section contains icons for various flow elements. The main area is titled 'New Flow' and shows a 'Core' tab with a 'All + Templates' dropdown. It lists six flow types: 'Screen Flow', 'Record-Triggered Flow' (which is selected and highlighted with a blue border), 'Schedule-Triggered Flow', 'Platform Event—Triggered Flow', 'Autolaunched Flow (No Trigger)', and 'Record-Triggered Orchestration'. A 'Create' button is located at the bottom right of the list.

Screenshot of the Flow Builder interface for a Record-Triggered Flow.

Flow Details:

- Start:** Record-Triggered Flow
- Object:** MySchool
- Trigger:** A record is created
- Optimize for:** Actions and Related Records

Flow Structure:

```

graph TD
    Start((Start)) -->|Record Triggered| RecordTriggered(( ))
    RecordTriggered -->|Run Immediately| RunImmediately((Run Immediately))
    RunImmediately -->|Action| studentRecordCreation["student record creation Action"]
    studentRecordCreation -->|End| 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:** Actions and Related Records

System Status:

- Humid
- 32°C Partly sunny
- 02:37
- 29-10-2023

Screenshot of the Flow Builder interface for a Student flow - V1.

Flow Details:

Start: Record-Triggered Flow

Action: student record creation

Flow Structure:

```

graph TD
    Start((Start)) -->|Record Triggered| RecordTriggered(( ))
    RecordTriggered -->|Run Immediately| RunImmediately((Run Immediately))
    RunImmediately -->|Action| studentRecordCreation["student record creation Action"]
    studentRecordCreation -->|End| End((End))
  
```

Message: Your flow was activated.

Configuration Panels:

- Version 1: Active—Last modified in a few seconds
- Run, Debug, View Tests, Deactivate, Save As, Save

System Status:

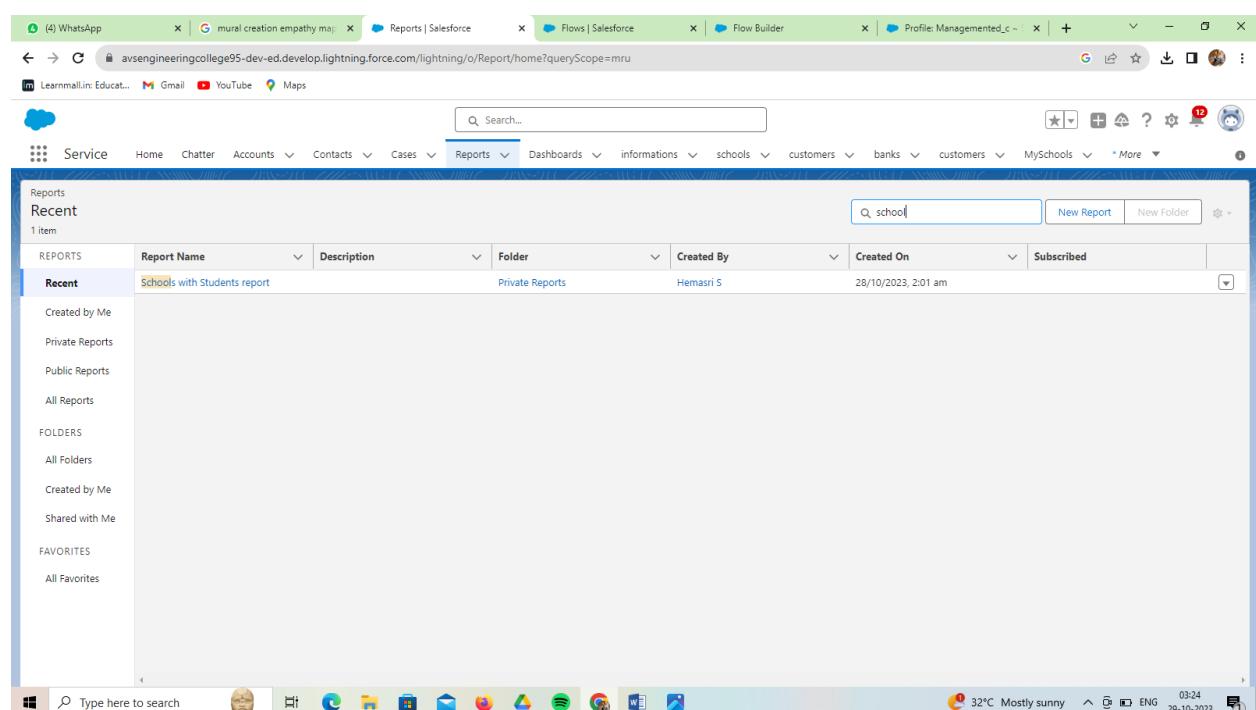
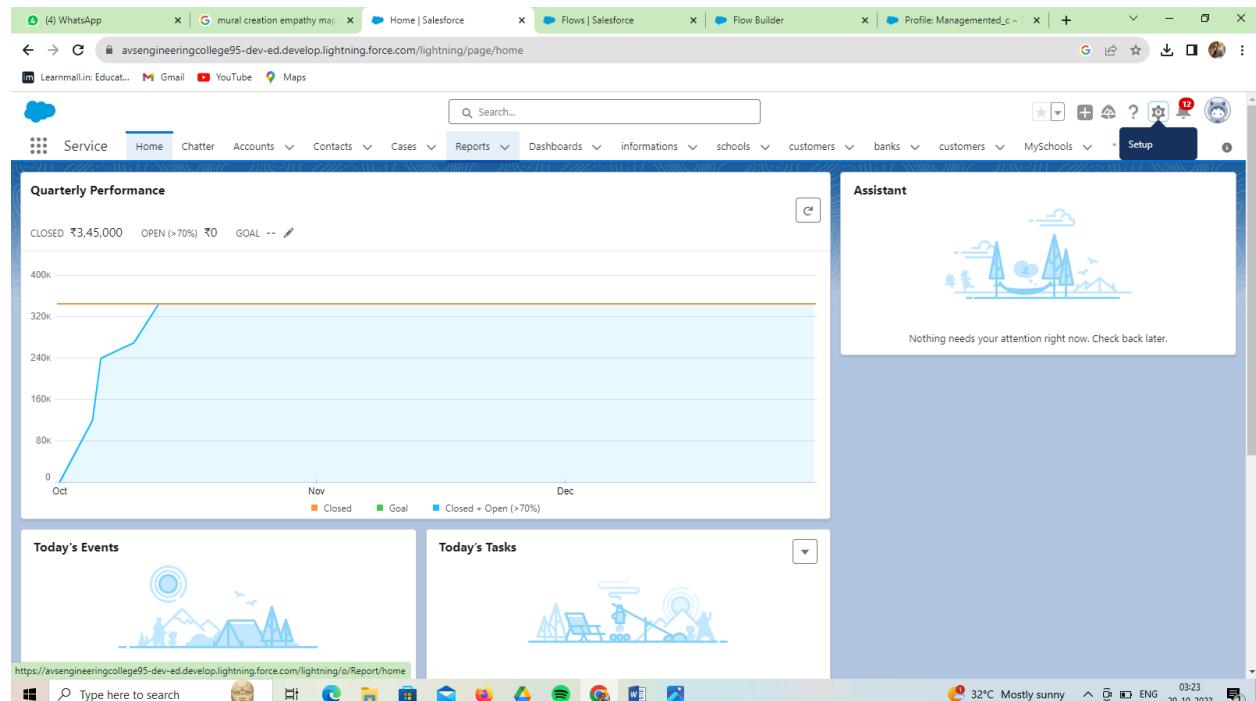
- Humid
- 32°C Partly sunny
- 02:37
- 28-10-2023

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

	Parent: Parent Name
1	sekar

The top navigation bar includes links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, informations, schools, customers, banks, MySchools, and More. The bottom taskbar shows various application icons.

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

- Details:** Displays basic information such as Name (Hemasri S), Title (Manager), Company Name (AVS Engineering College), Email (hemasrisekar02@gmail.com), Address (IN), and a "About Me" section.
- Chatter:** A feed area with tabs for Post, Poll, and Question, and a text input field for sharing updates.
- Related:** A sidebar listing related items:
 - Groups (0)
 - Files (1): images schl (18-Oct-2023 • 10KB • png)
 - Followers (0)
 - Following (0)

The top navigation bar and taskbar are identical to the first screenshot.

The screenshot shows a Salesforce Lightning interface for a Parent record. The record details are as follows:

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

The Owner of the record is Hemasri S.

The screenshot shows the same Salesforce Lightning interface after the Parent record has been saved. A green success message at the top of the page states: "Parent "sekar" was saved." The record details remain the same as in the previous screenshot.

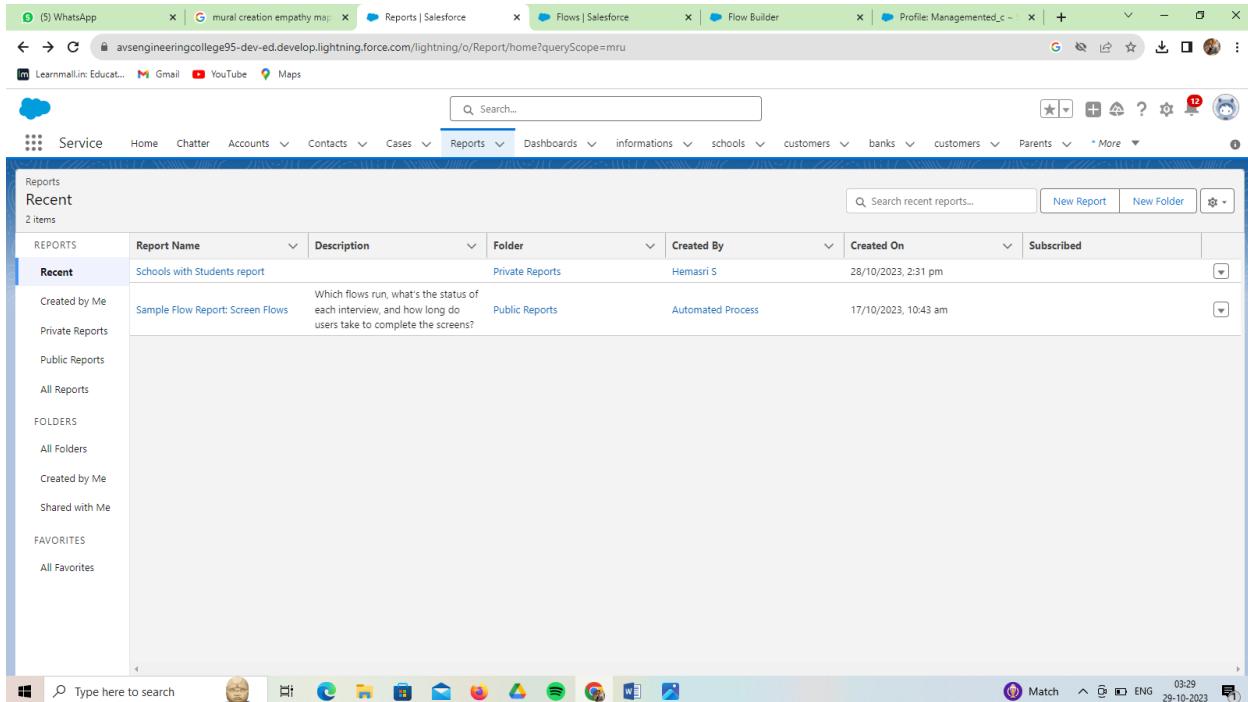
The screenshot shows a Salesforce Lightning interface. The top navigation bar includes tabs for WhatsApp, mural creation empathy map, Schools with Students report, Flows | Salesforce, Flow Builder, and Profile: Management_c. Below the navigation is a secondary menu with Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, informations, schools, customers, banks, customers, Parents, and More. A search bar is at the top right. The main content area displays a report titled "Report: Parents Schools with Students report". It shows a single record with the Parent: Parent Name field containing "sekar". A message box indicates the report was saved. The bottom of the screen shows a taskbar with various application icons and a system status bar showing 32°C, Mostly sunny, 03:27, ENG, and the date 29-10-2023.

View Report

The screenshot shows the Salesforce Reports page. The top navigation bar is identical to the previous screenshot. The main content area displays a table of recent reports. The columns are Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: "Schools with Students report" (Private Reports, Hemasri S, 28/10/2023, 2:31 pm) and "Sample Flow Report: Screen Flows" (Public Reports, Automated Process, 17/10/2023, 10:43 am). The left sidebar contains navigation links for Reports, Recent (2 items), Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The bottom of the screen shows a taskbar with various application icons and a system status bar showing Match, 03:28, ENG, and the date 29-10-2023.

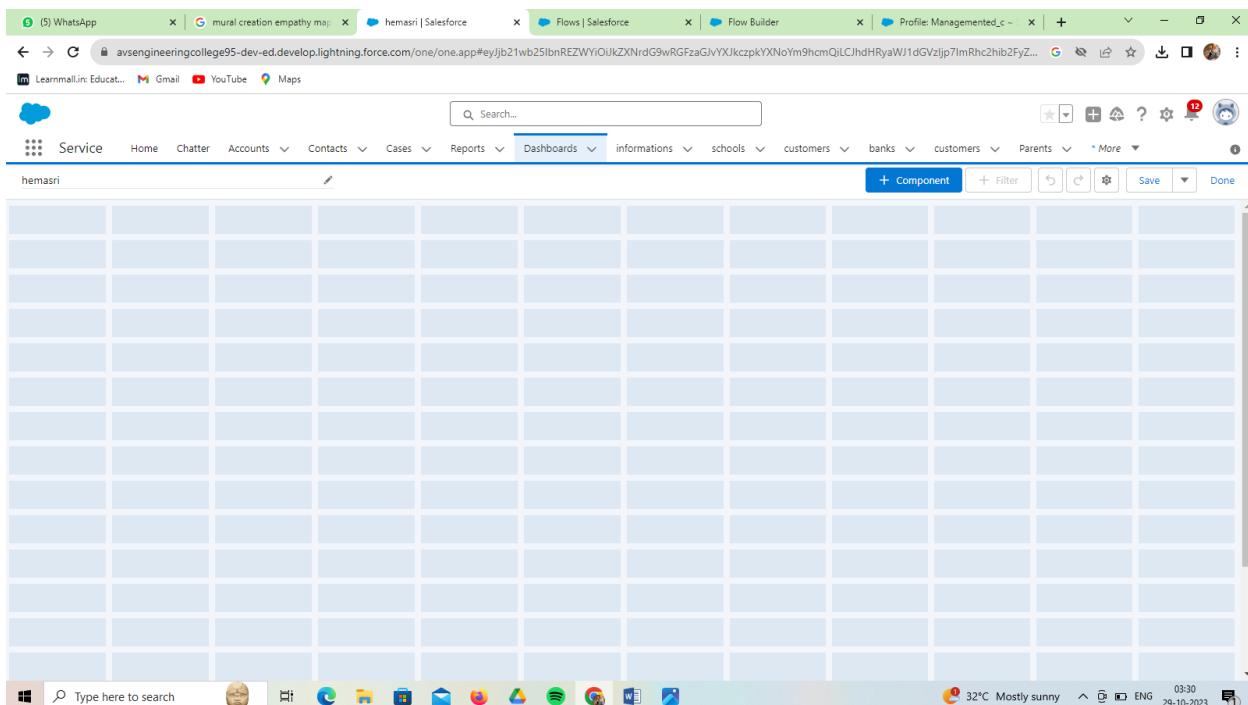
5.2 Dashboard

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 tabs for Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Informations, Schools, Customers, Banks, Parents, and More. The Reports tab is selected. On the left, a sidebar lists categories: Recent, Reports (Recent), Created by Me (Private Reports, Public Reports, All Reports), Folders (All Folders), and Favorites (All Favorites). The main content area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
Schools with Students report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	Hemarsi S	28/10/2023, 2:31 pm	
Sample Flow Report: Screen Flows		Public Reports	Automated Process	17/10/2023, 10:43 am	



The screenshot shows the Salesforce Flow Builder interface. The top navigation bar includes tabs for Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Informations, Schools, Customers, Banks, Parents, and More. The Reports tab is selected. The main content area is titled "hemarsi" and contains a large, empty grid canvas. At the top of the canvas, there are buttons for "+ Component", "+ Filter", and "Save". The bottom right corner of the canvas has a "Done" button. The status bar at the bottom indicates "32°C Mostly sunny" and the date "29-10-2023".

The screenshot shows a Salesforce dashboard titled "Schools with Students report". The dashboard has a search bar at the top and a sidebar on the left containing a report component titled "Parent: Parent Name" with the value "sekar". The main area is a large grid table with many columns and rows, representing student data. At the bottom of the dashboard, there is a toolbar with various icons and a status bar showing "32°C Mostly sunny" and the date "29-10-2023".

View Dashboard

The screenshot shows a similar Salesforce dashboard setup. A green success message box in the center says "Dashboard saved" with a checkmark icon. The rest of the interface is identical to the first screenshot, including the sidebar, grid table, and status bar.

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)