



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



Presented by

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# Our Trailblazer accounts

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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>
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## INTRODUCTION

### Overview:

The project "Creation of an Application for School Management - Admin" in Salesforce aims to develop a comprehensive and customizable cloud-based solution for managing various administrative tasks in educational institutions. Leveraging Salesforce's powerful platform and tools, the application will streamline and automate administrative processes, improving efficiency and data management.

### 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:**

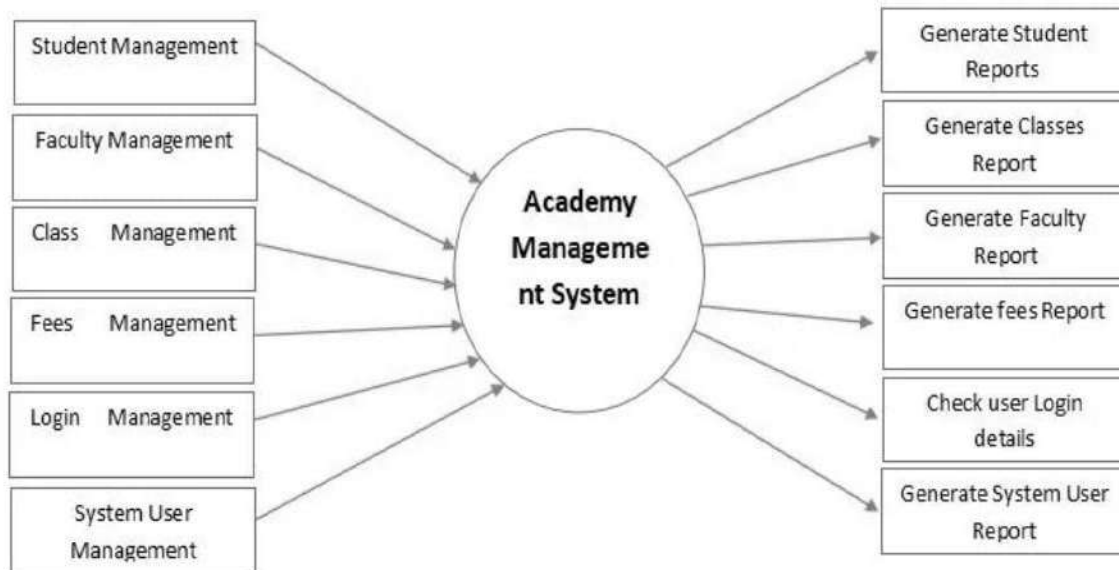
- 1.The existing problem with the creation of an application for school management is the lack of a unified and efficient system to handle various administrative tasks.
- 2.Many schools still rely on manual processes, spreadsheets, and disparate software, leading to inefficiencies, data inconsistencies, 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:**



## 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:

### 1. Hardware Requirements

### 2. Salesforce Platform Requirements

- Salesforce Account
- Edition
- Licenses

### 3. Salesforce Limits and Allocations

- API Limits
- Data Storage
- Custom Objects and Fields

### 4. Security and Compliance

- Data Privacy
- User Authentication

### 5. Customization and Development

- Development Environment
- Integration Requirements

## 6. User Training and Support

- User Training
- Technical Support

# PROCESS AND RESULTS

## 1. Creating Developer Org:

Creating a developer org in salesforce

- Go to [developer.salesforce.com](https://developer.salesforce.com)
- Click on sign up.
- On the sign up form, enter the following details
  - First name & Last name
  - Email
  - Role – Administrator
  - Company - College Name
  - Country – India
  - Postal Code - pin code
  - Username- should be a combination of your name and company

The screenshot shows the Salesforce Developer Edition Sign-up page. The left side features a blue background with the text "bring your ideas to life" and a list of benefits: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The right side contains the sign-up form with the following fields and values:

Field	Value
First Name*	Shaik
Last Name*	Ruksana
Email*	208x1a05g1@khitguntur.ac.in
Role*	Administrator
Company*	KHITProject
Country/Region*	India
Postal Code*	522004
Username*	ruksanasrilakshmi@project.com

Below the Username field, there is a note: "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.](#)"

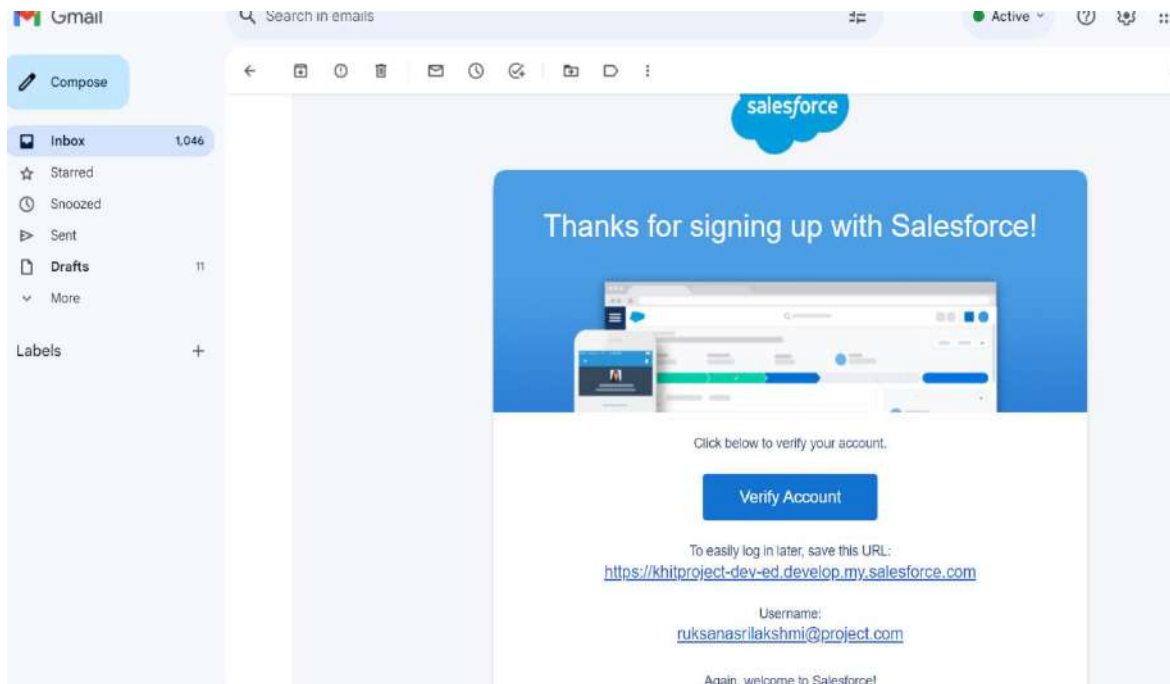
There is a checked checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement."

At the bottom, there is a checkbox for "Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time."

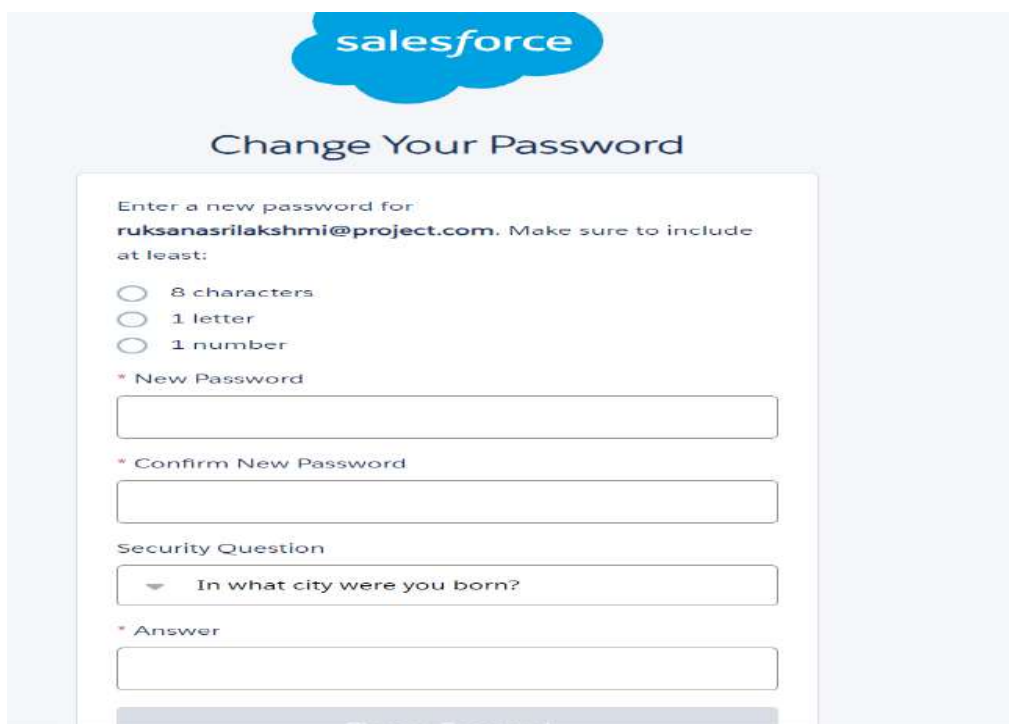
The browser's address bar shows "developer.salesforce.com/signup". The Windows taskbar at the bottom shows the date as 05-08-2023 and the time as 19:02.

## 2.Account Activation:

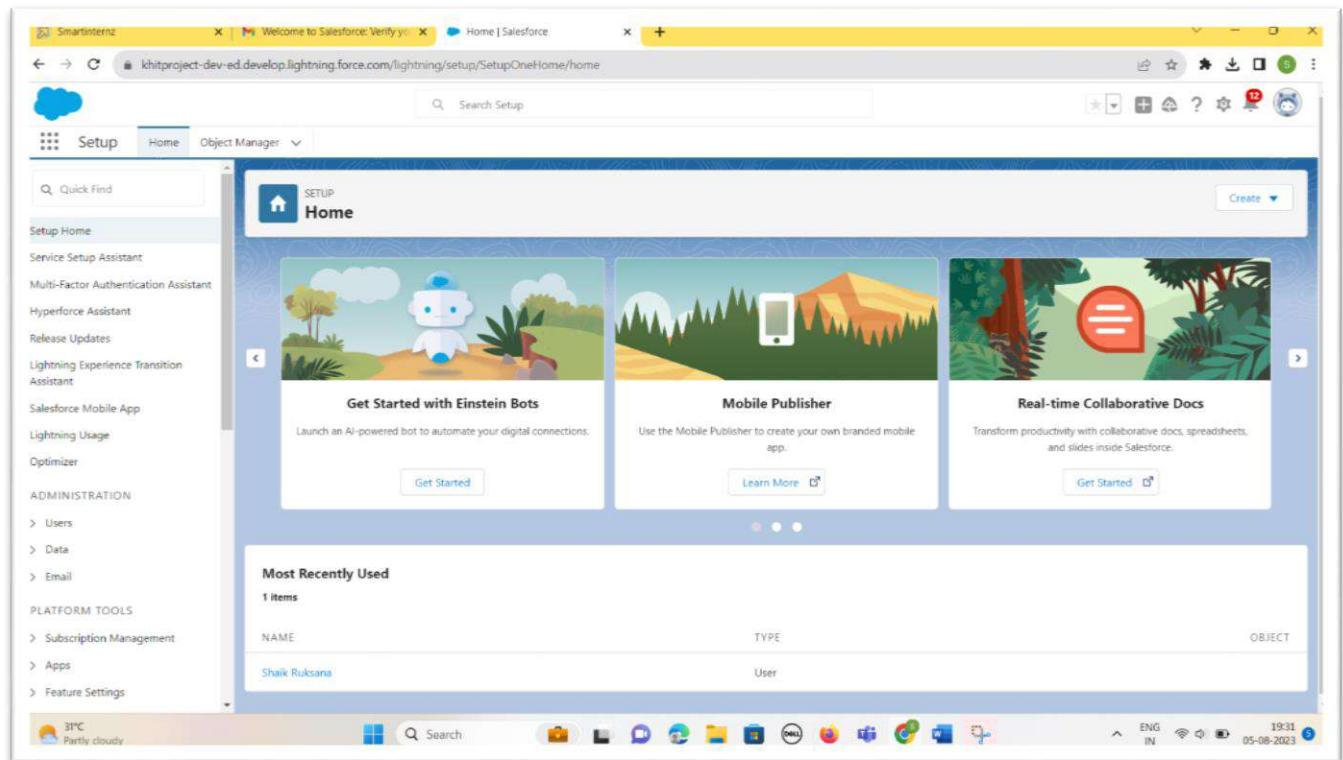
We have to verify our email to activate the account. So, click on verify account to activate the Salesforce Account



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

A screenshot of the Salesforce 'Change Your Password' setup screen. It features the Salesforce logo at the top. The main heading is 'Change Your Password'. Below it, a message says 'Enter a new password for ruksanasrilakshmi@project.com. Make sure to include at least:'. There are three radio button options: '8 characters', '1 letter', and '1 number'. Below these are two required password fields: '\* New Password' and '\* Confirm New Password'. Then, there is a 'Security Question' section with a dropdown menu showing 'In what city were you born?'. Below that is an 'Answer' field. At the bottom, there is a 'Change Password' button.

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:**

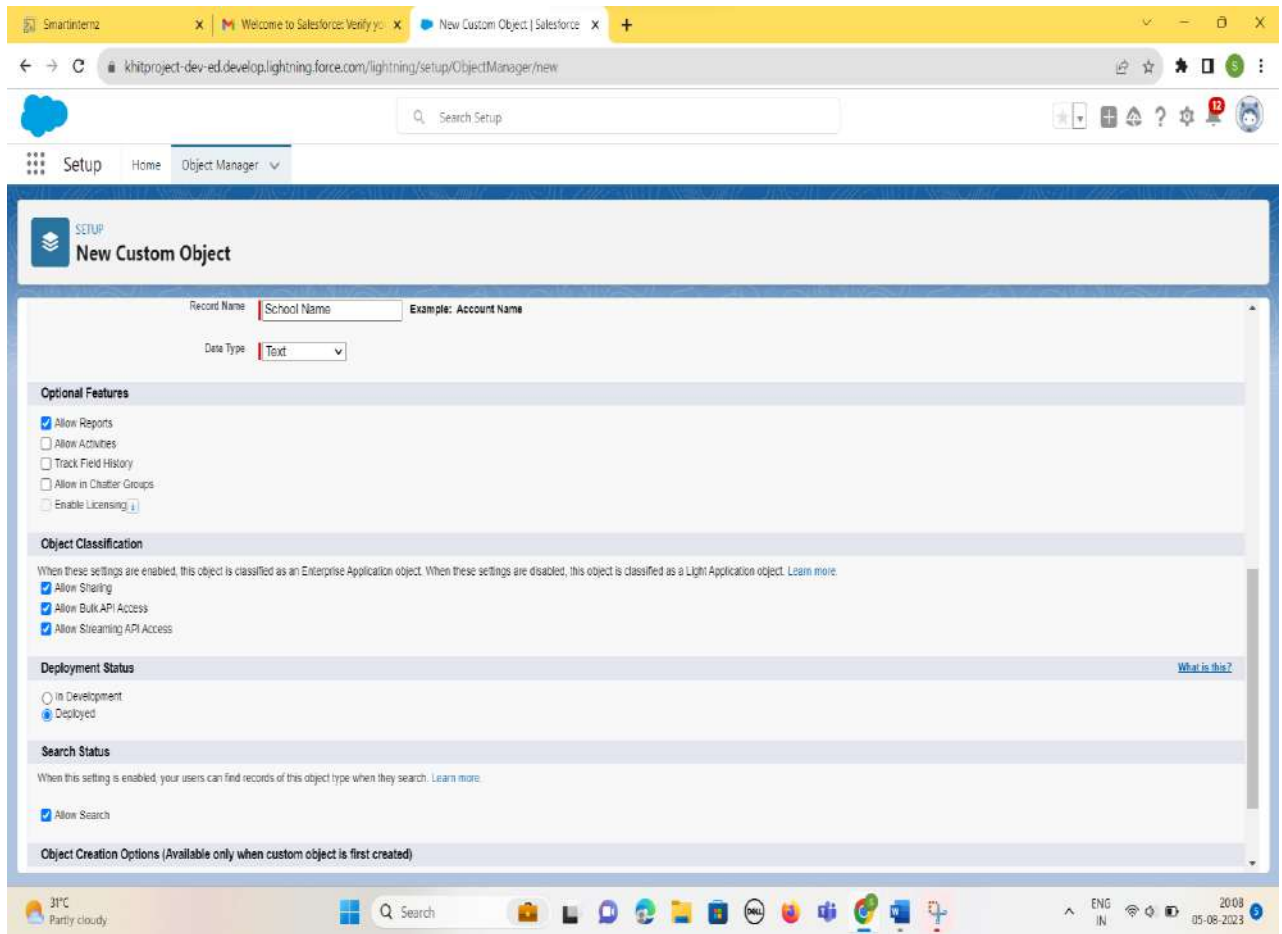
- 1.School Object
- 2.Student Object
- 3.Parent Object

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.

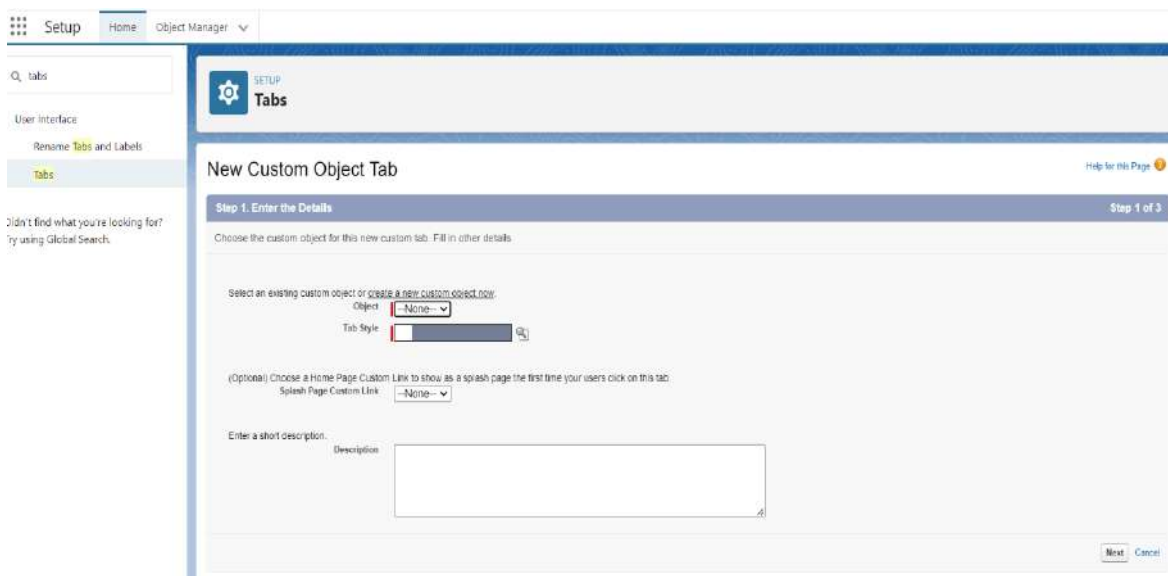
The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar indicates the URL is [khitproject-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new](https://khitproject-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new). The page title is 'New Custom Object'. Below the title, there is a message: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)'. The main section is 'Custom Object Definition Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. Under 'Custom Object Information', there are fields for 'Label' (School), 'Plural Label' (Schools), 'Object Name' (School), and 'Description'. There are also checkboxes for 'Starts with vowel sound' and 'Allow Reports', and a radio button for 'Allow Search'. The page is titled 'New Custom Object' and has a 'Setup' tab selected in the navigation bar.






Now create a custom tab. Click the Home tab.




Search for Tabs Then Click it -> Custom Tab-> New



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

Custom Object Tabs			New	<a href="#">What Is This?</a>
Action	Label	Tab Style		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Schools</a>	 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			New	<a href="#">What Is This?</a>
Action	Label	Tab Style		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Parents</a>	 Telescope		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Schools</a>	 Building		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Students</a>	 Books		

## 4. Creating the Lightning App

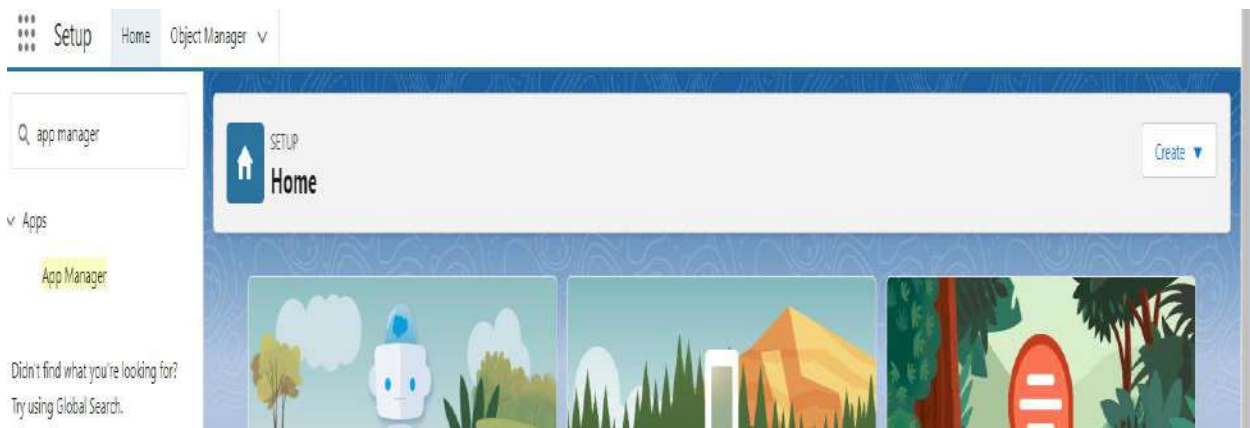
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

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 ⓘ

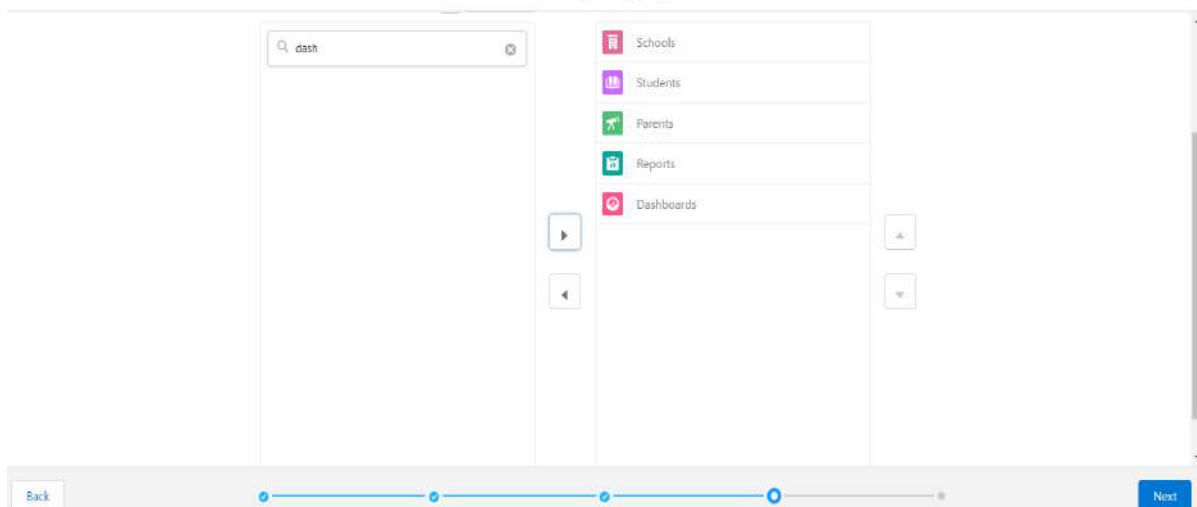
#0070D2

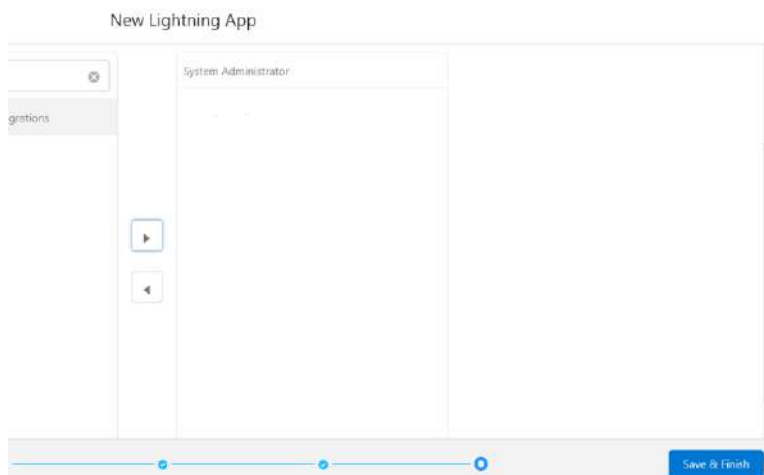
Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

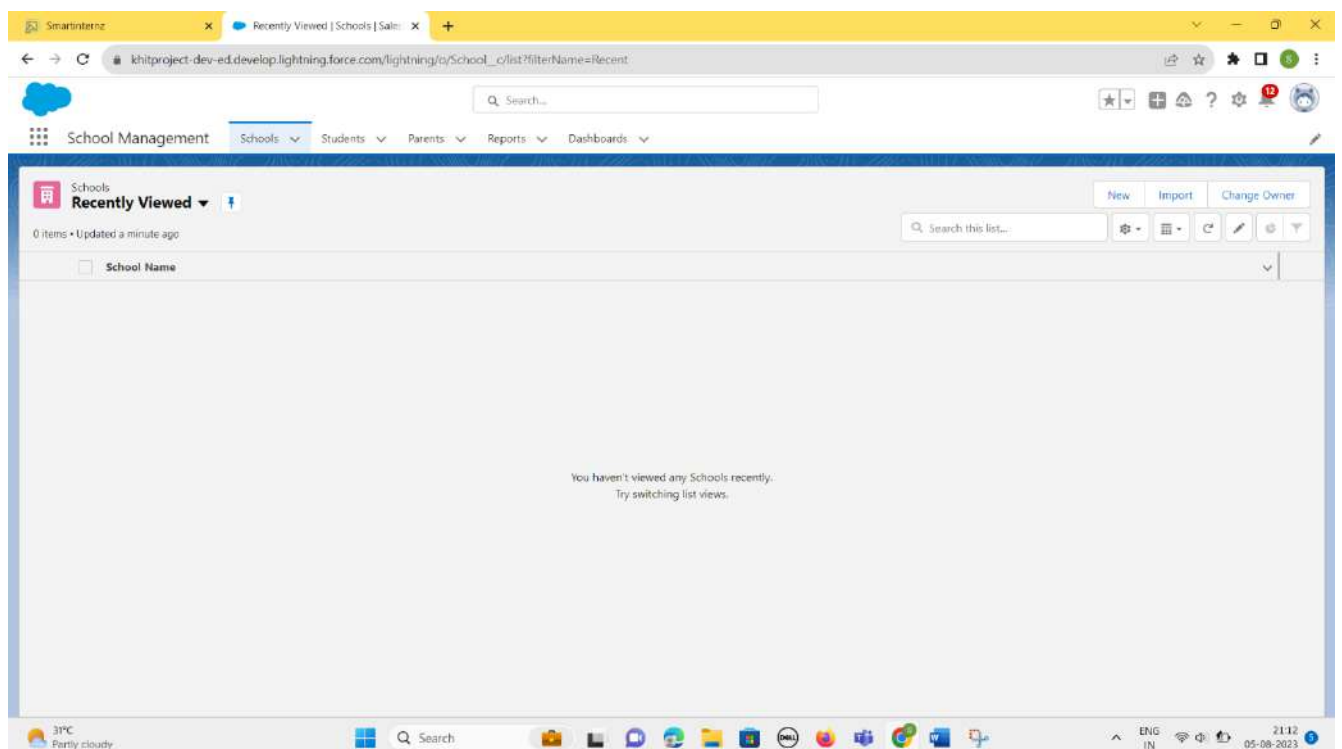
Next

## New Lightning App





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.



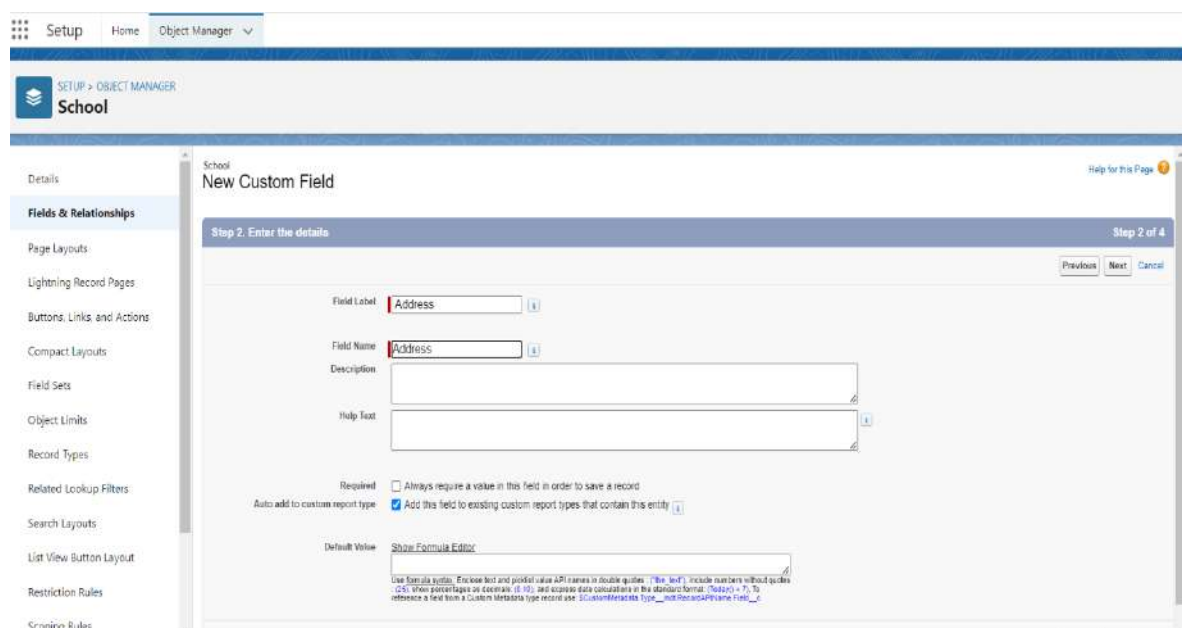
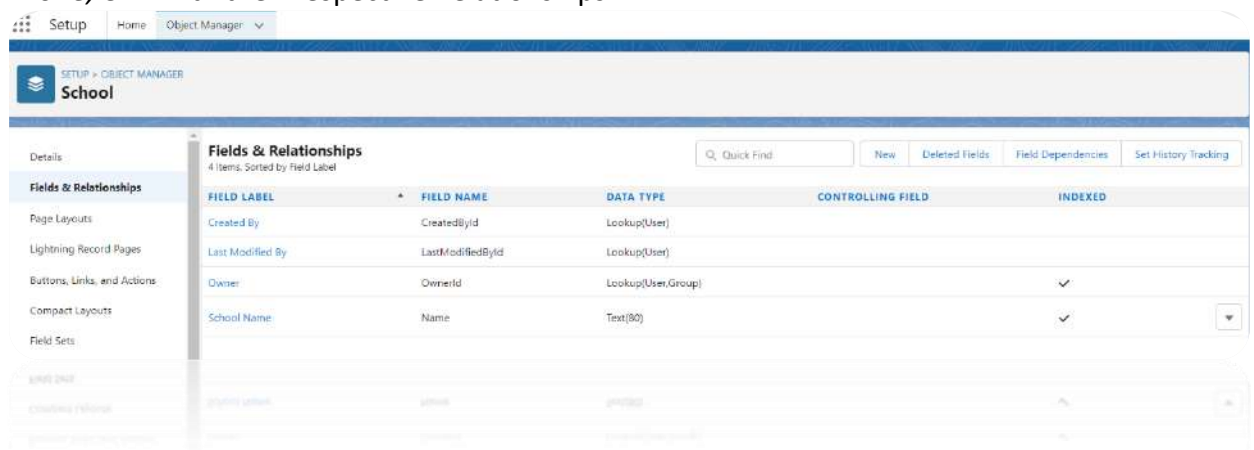
## 5.Fields and Relationship

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.

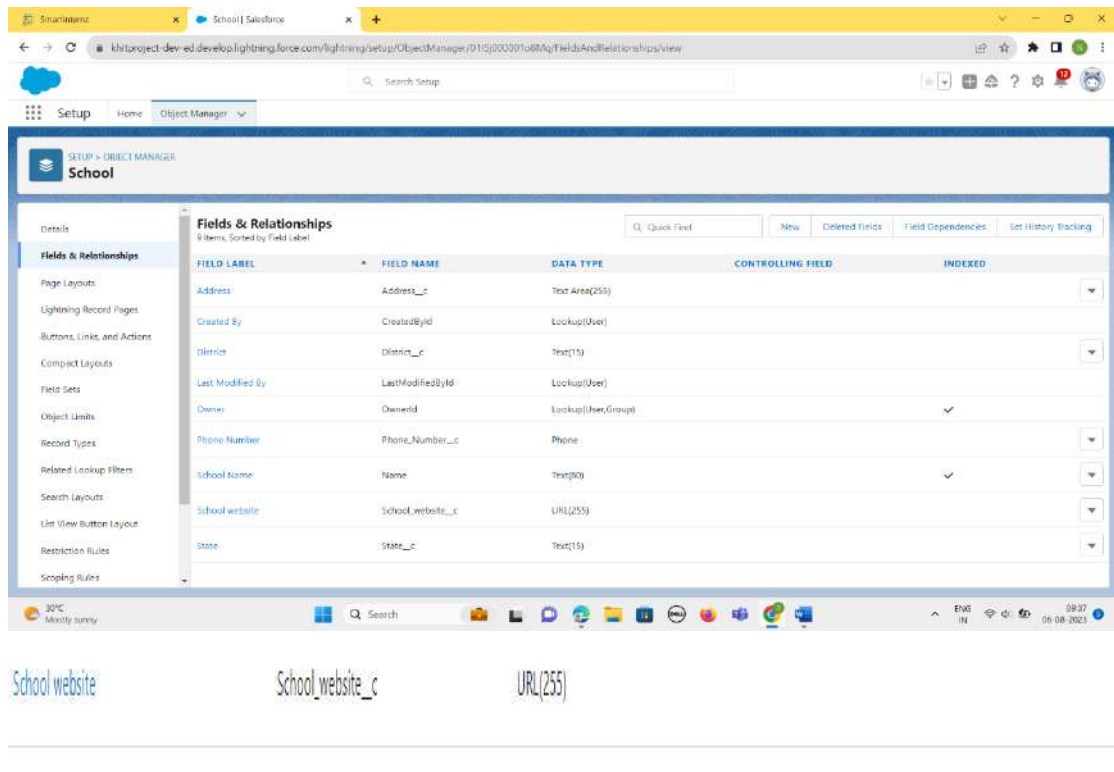
## Creation Of Fields for The School Object:

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.



After creating all the required fields for the School Object



## 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

SETUP > OBJECT MANAGER  
**Student**

Details

**Fields & Relationships**  
7 Items, Sorted by Field Label

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)		✓

SETUP > OBJECT MANAGER  
**School**

Details

**Fields & Relationships**  
11 Items, Sorted by Field Label

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:

SETUP > OBJECT MANAGER  
**Parent**

Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

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		

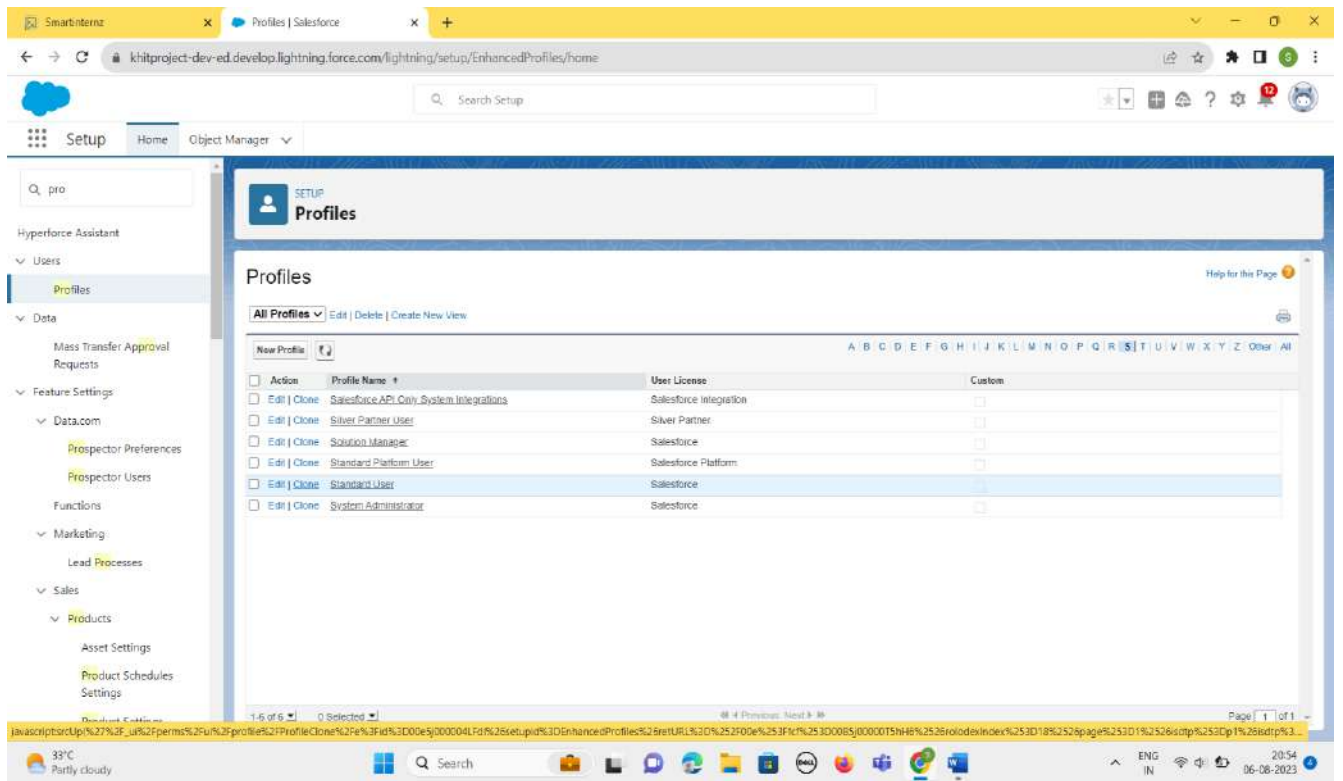
## 6.Profile

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.

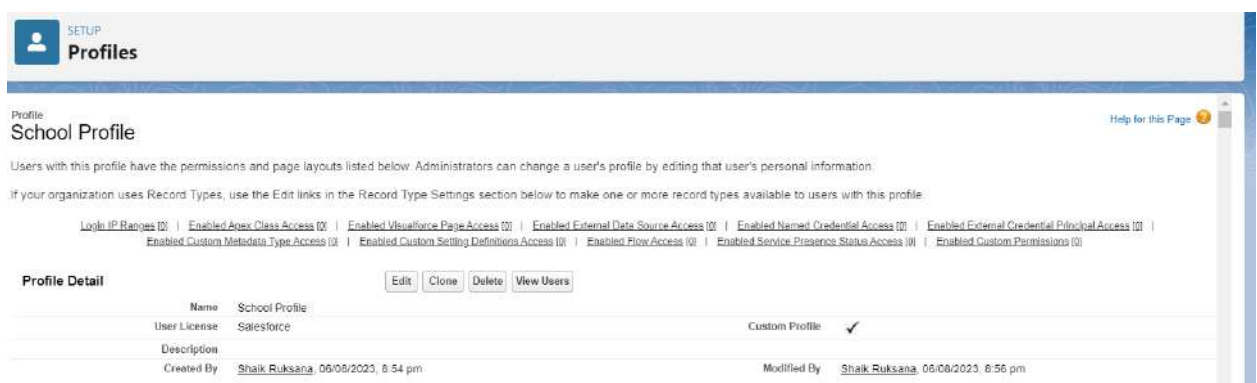
### Creation On Profile:

- 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 “School Profile” is created as below:



## 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.

The screenshot displays the Salesforce 'New User' configuration interface. The 'General Information' section contains the following fields: First Name (empty), Last Name (Parents), Alias (pare), Email (208x1a05g1@khlquntur.ac), Username (parents208x1a05g1@khlq), Nickname (par), Title (empty), Company (empty), Department (empty), and Division (empty). The 'Role' section includes: Role (None Specified), User License (Salesforce), Profile (School Profile), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only) (unchecked), and High-Contrast Palette on Charts (unchecked). The left sidebar shows the 'Setup' menu with 'Users' selected. The bottom status bar shows the date and time as 21:24 on 06-08-2023.

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

The screenshot shows the Salesforce 'Users' page. At the top, there's a 'SETUP Users' header. Below it, a sub-header 'All Users' is followed by instructions on how to manage users. A 'View:' dropdown is set to 'All Users', with links for 'Edit' and 'Create New View'. A navigation bar at the top right lists letters A through S. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains seven rows of user data. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d5j00000cmbz9ead_ehx6v2briwlm@chatter.salesforce.com		✓	Chatter Free Use
<a href="#">Edit</a>	Parents	pare	parents.206x1a05g1@khitguntur.ac.in		☐	School Profile
<a href="#">Edit</a>	principals	prin	princi208x1a05g1@khitguntur.ac.in		✓	School Profile
<a href="#">Edit</a>	Ruksana Shaik	SRuks	ruksanasnilakshmi@project.com		✓	System Administ
<a href="#">Edit</a>	Teachers	teac	tea208x1a05g1@khitguntur.ac.in		☐	School Profile
<a href="#">Edit</a>	User Integration	integ	integration@00d5j00000cmbz9ead.com		✓	Analytics Cloud li
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d5j00000cmbz9ead.com		✓	Analytics Cloud S

## 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

yperforce Assistant

lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

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: [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

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"/>

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 ⓘ  
☐ Specify the expiration date

**Selected Users**

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

## 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](#)

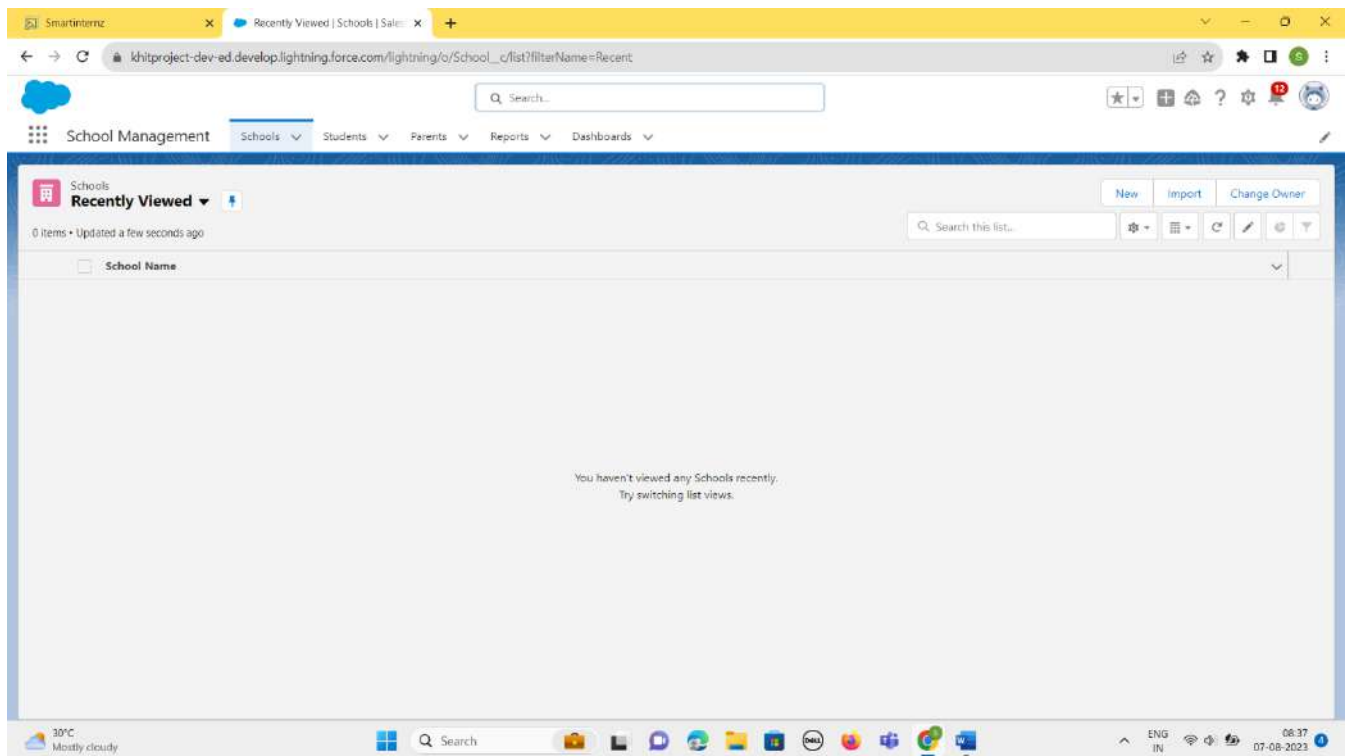
Action	Permission Set Label	Description
<a href="#">Del</a>   <a href="#">Clone</a>	Principal permission	

## 9. User Adoption

### Create Record (School):

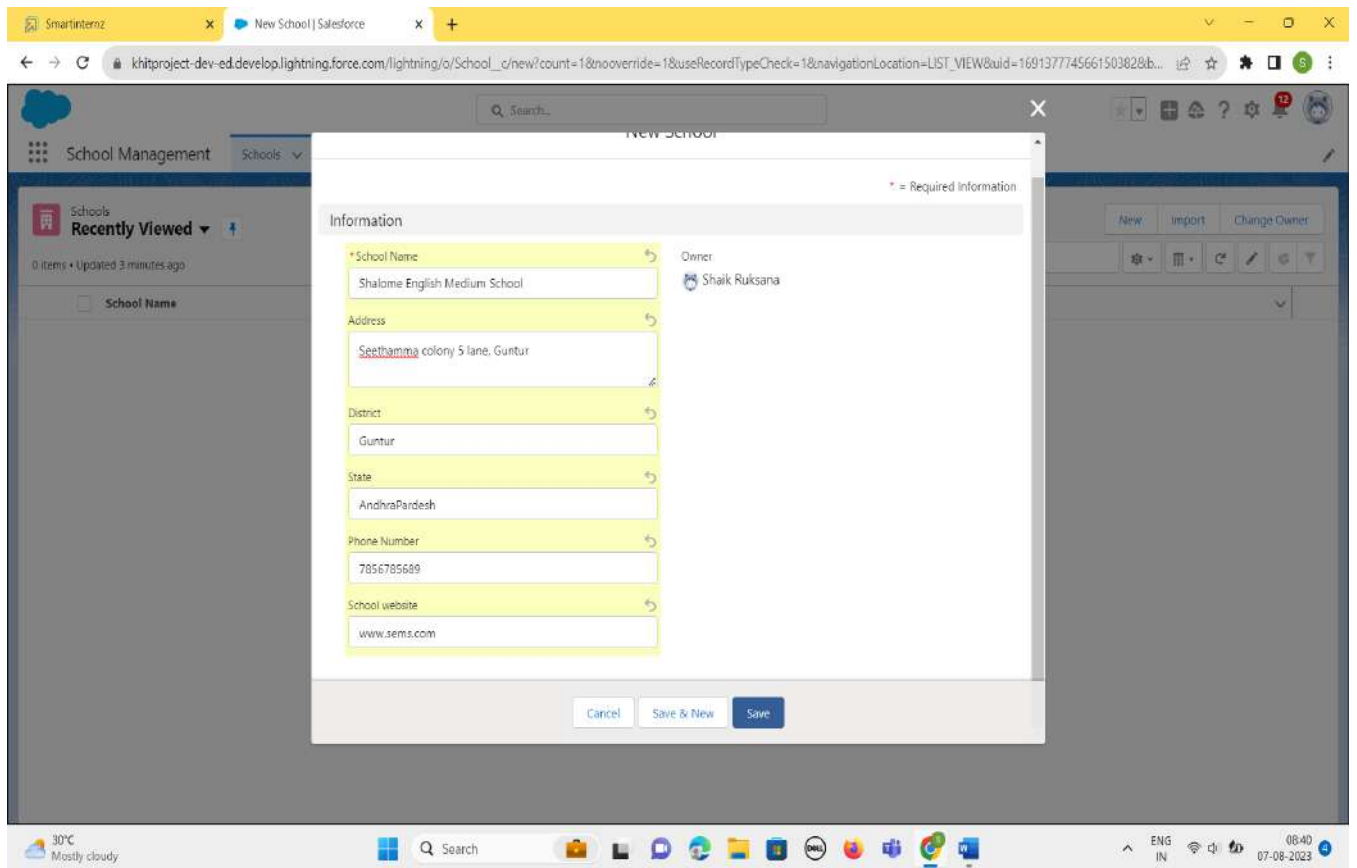
1. Click on App Launcher on left side of screen.

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

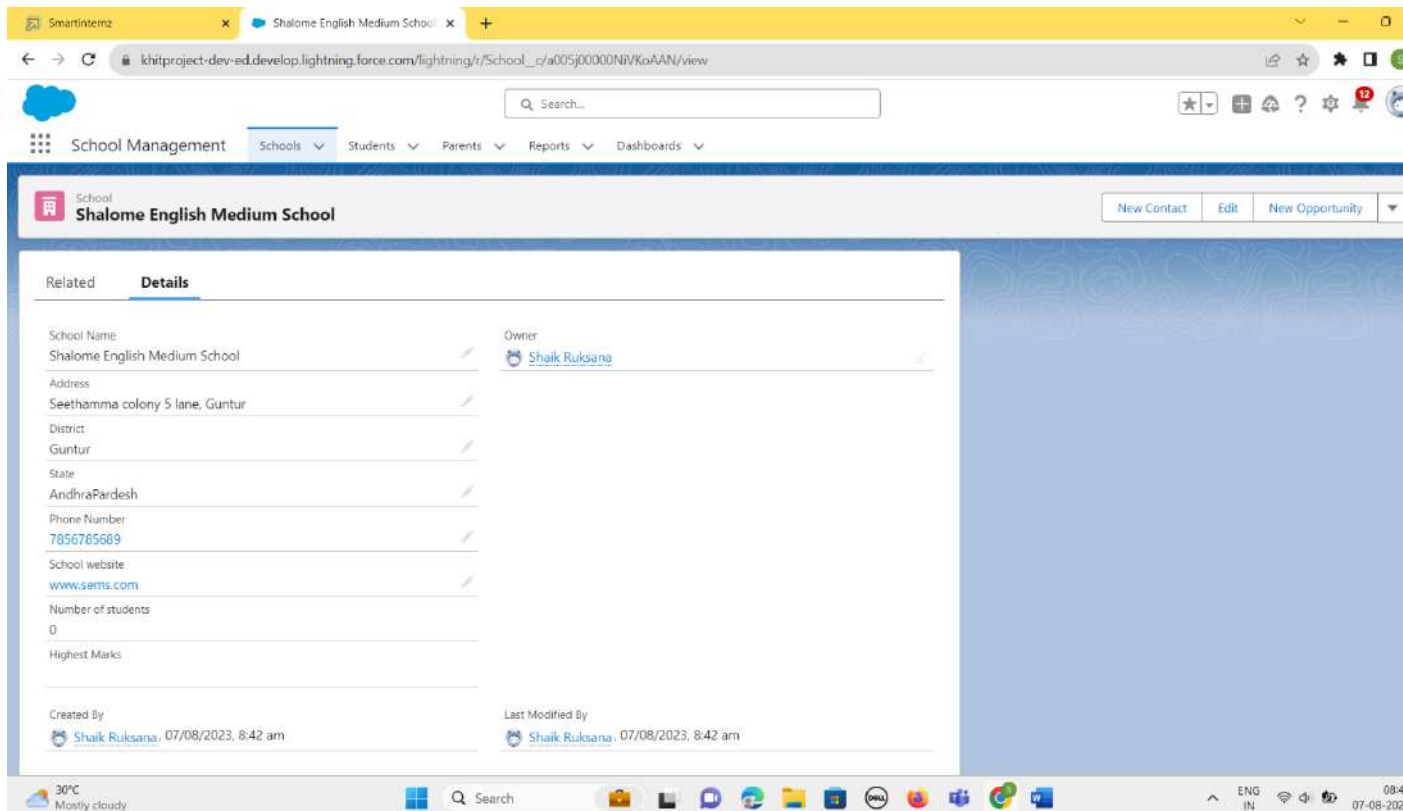


Clicking new, we have to fill the details of the school like School Name, Address, State, District, Phone Number, School Website.

This is displayed below:

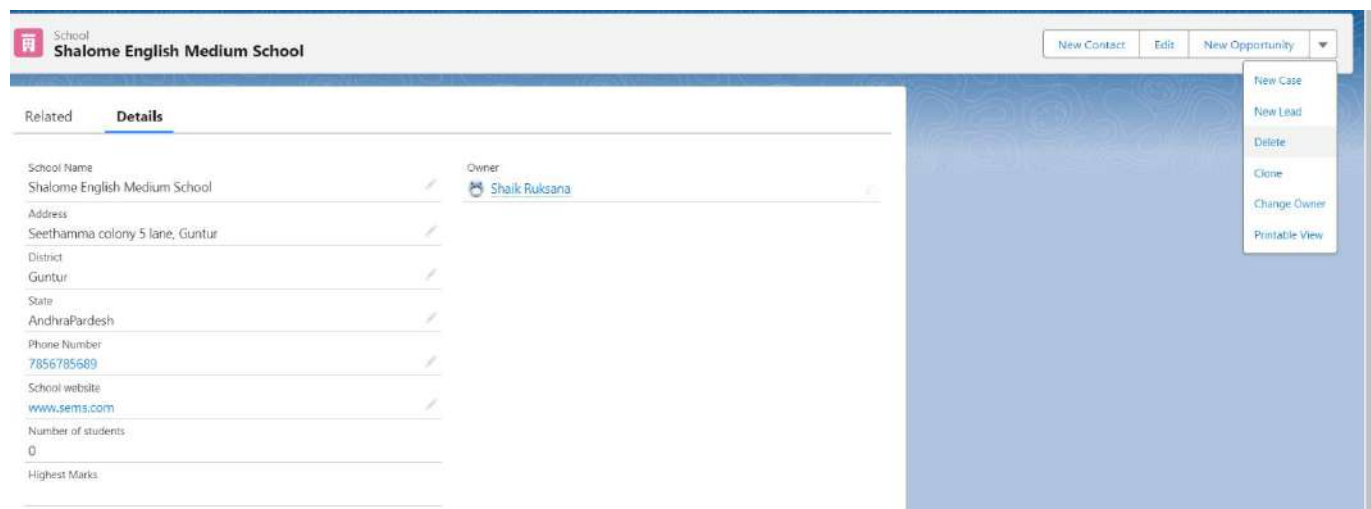


## View Record (School):

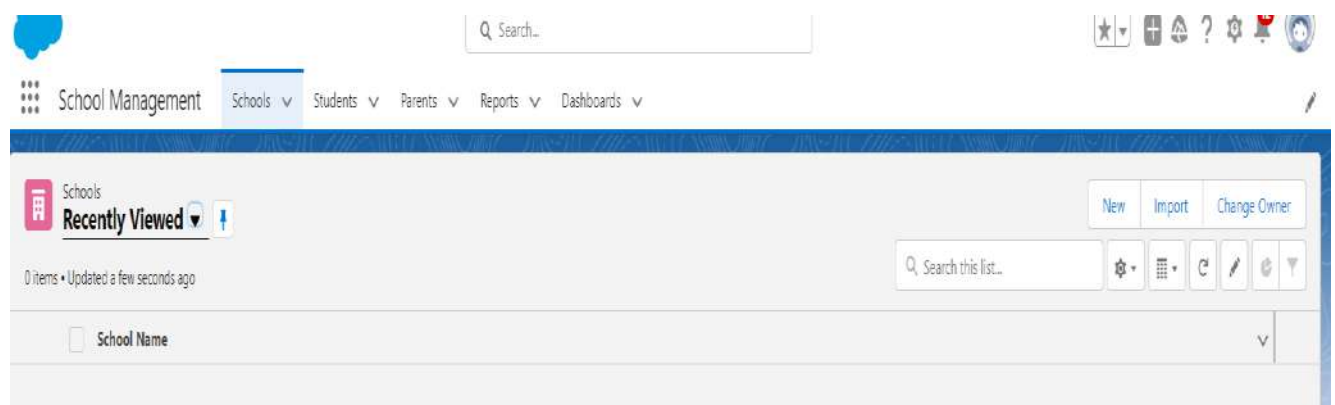




## Delete Record (School):



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



## 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:

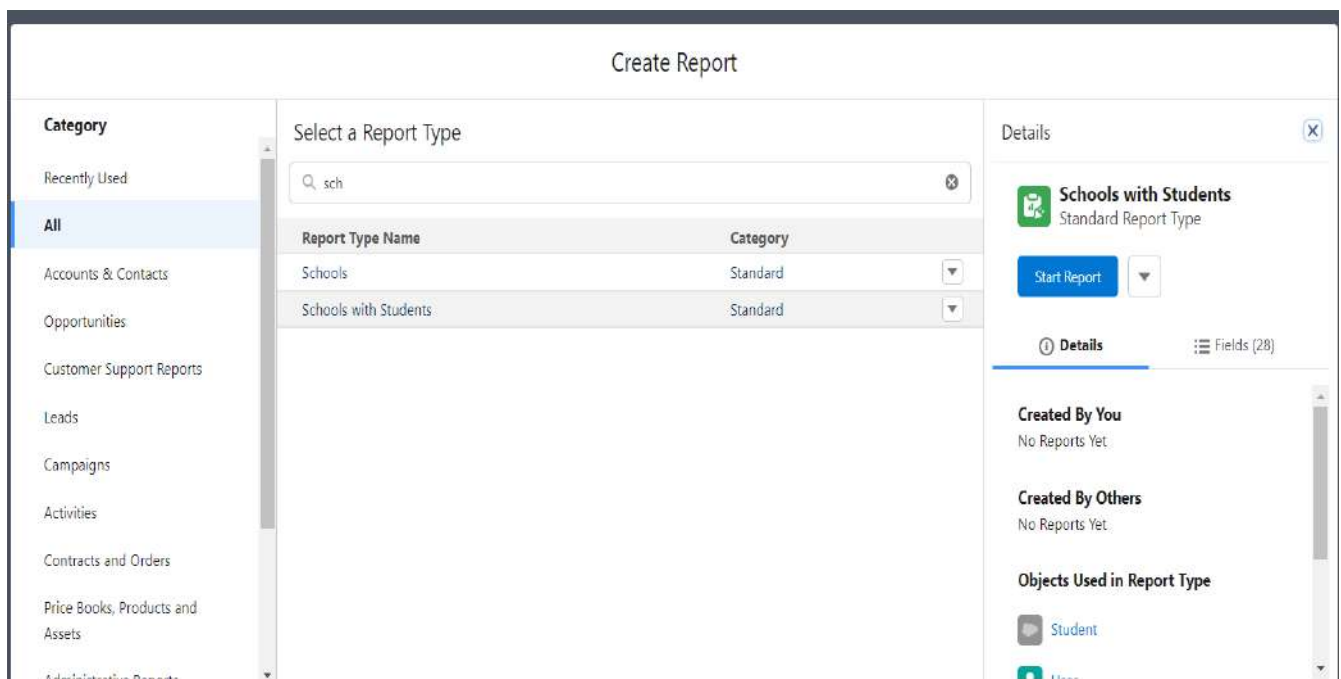
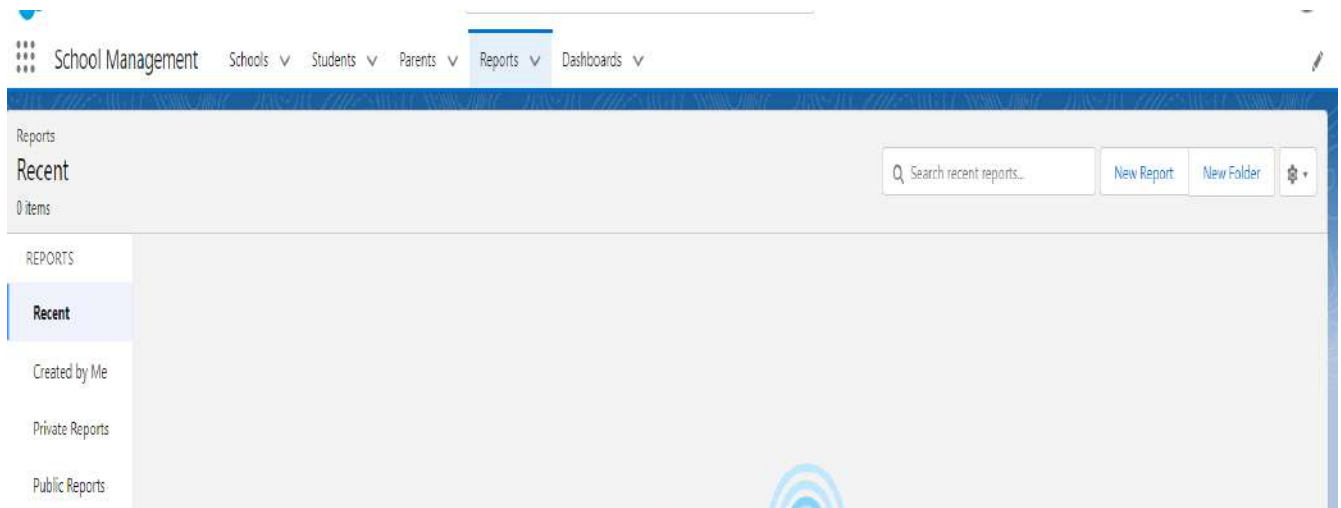
- 1.In School Management App click Reports tab.
- 2.Click New Report.
- 3.Select the report type as School with students and parents for the report.
- 4.Click start report.



5. Customize your report, then save and run

6. Give report name – Schools with Students Report

7. Click Save



The 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 Select Folder

Cancel Save

## 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.

Setup Home Object Manager

school

Apps

School Management

Items

Schools

View All

School Management

Schools Students Parents Reports Dashboards

Reports

Recent

1 item

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Schools with Students Report		Private Reports	Shaik Ruksana	7/8/2023, 9:08 am	

Created by Me

Private Reports

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*