

They can be used to automate a wide range of tasks, from simple to complex, and can be tailored to meet the unique needs of your organization.

The image displays two screenshots of the Salesforce interface. The top screenshot shows the 'Flow Builder' for a 'Student Flow - V1'. The flow is a 'Record-Triggered Flow' that starts with a 'Run Immediately' trigger, followed by a 'Student Record Creation' action, and ends with an 'End' node. The bottom screenshot shows the 'Setup Flows' page in the Salesforce Setup menu. It lists 37 flow definitions, including 'Basic Approval Request', 'Basic Survey', 'Book Appointment from Invitation', 'Cancel Item Flow', 'Change Case Owner to Incident Owner', 'Close Change Request & Related Issues', 'CMS Check Whether Any Step is Completed', 'CMS Notify Content Author', 'CMS Review Content', 'CMS Submit Content for Review', 'CMS Withdraw Review Request', 'Create a Case', and 'Create Order Summary Flow'. The table includes columns for Flow Label, Process Type, Active status, Template, Package State, Package, Last Modified By, and Last Modified Date.

Flow Label	Process Type	Active	Template	Package State	Package	Last Modified By	Last Modified Date
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed			
Basic Survey	Screen Flow	✓	✓	Unmanaged		Balaji S S	03/10/2023, 2:14 pm
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Cancel Item Flow	Screen Flow	✓	✓	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	✓	✓	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	✓	✓	Managed-Installed			
CMS Check Whether Any Step is Completed	Evaluation Flow	✓	✓	Managed-Installed			
CMS Notify Content Author	Screen Flow	✓	✓	Managed-Installed			
CMS Review Content	Screen Flow	✓	✓	Managed-Installed			
CMS Submit Content for Review	Screen Flow	✓	✓	Managed-Installed			
CMS Withdraw Review Request	Screen Flow	✓	✓	Managed-Installed			
Create a Case	Screen Flow	✓	✓	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	✓	✓	Managed-Installed			

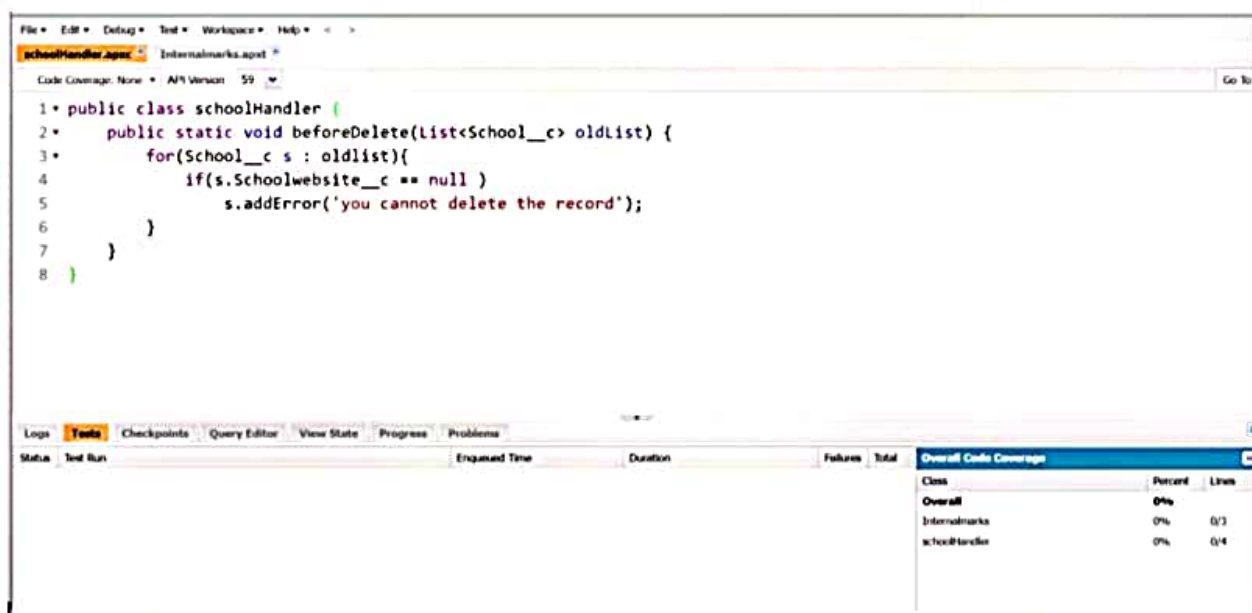
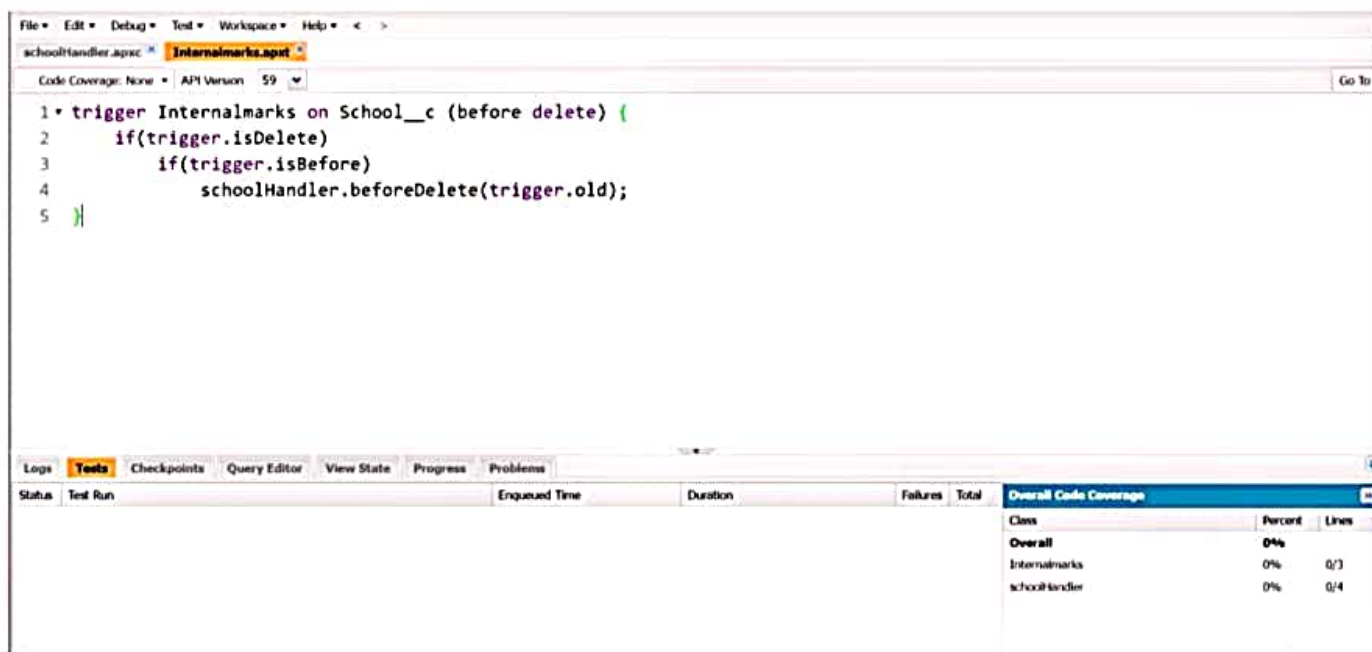
13.GitHub & Project Video Demo Link

GitHub Link:

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    }
}

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12.Flows

Record-triggered flows are a powerful automation tool in Salesforce that can streamline business processes, reduce manual work, and improve productivity.



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



11.Triggers

A trigger refers to an Apex code that is automatically executed before or after certain events occur in the

Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

From this milestone we are going to import the data and create the reports and dashboards for data visualization in the application

Create Report

Reports:

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

12.Flows

Record-triggered flows are a powerful automation tool in Salesforce that can streamline business processes, reduce manual work, and improve productivity. They can be used to automate a wide range of tasks, from simple to complex, and can be tailored to meet the unique needs of your organization.

The image shows the Salesforce Flow Builder interface at the top and the Setup Flows page below it.

Flow Builder (Top): The interface shows a flow named "Student flow - V1". The flow diagram consists of three steps: "Record-Triggered Flow Start", "Run Immediately", and "Student Record Creation Action", followed by an "End" node. The flow is currently in "Version 1: Active" state, last modified 7 days ago. Buttons for "Run", "Debug", "View Tests", "Deactivate", "Save As", and "Save" are visible.

Setup Flows (Bottom): The "Setup Flows" page displays a list of flow definitions. The table below represents the data shown in the screenshot.

Flow Label	Process Type	Active	Template	Package State	Package	Last Modified	Last Modified Date
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic survey	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Unmanaged		Belaji S S	03/10/2023, 2:14 pm
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			