

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT



SALESFORECE NAAN MUDHALVAN PROJECT REPORT

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BONAFIDE CERTIFICATE

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1.INTRODUCTION

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.

As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

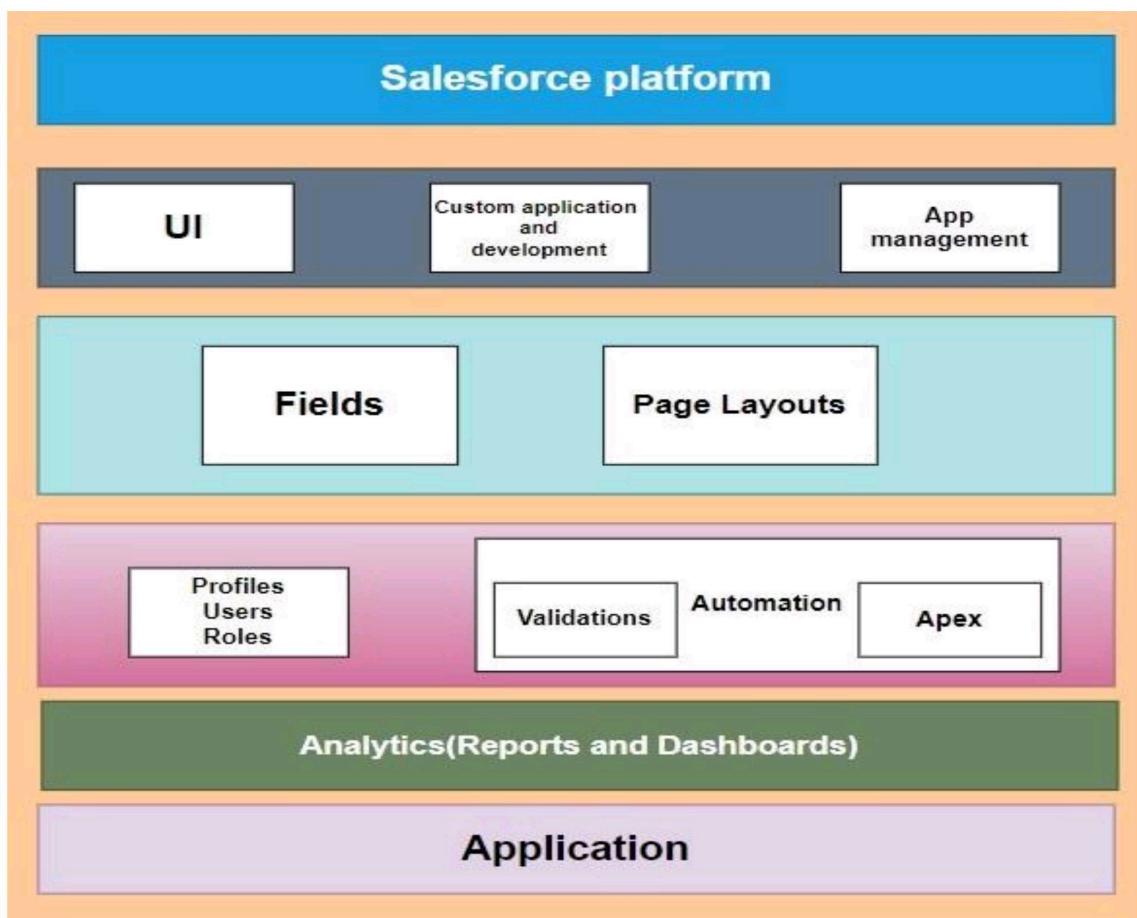
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

Creation Of An Application For School Management

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well



2.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.

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2.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.

2.1 Creation Of School Object

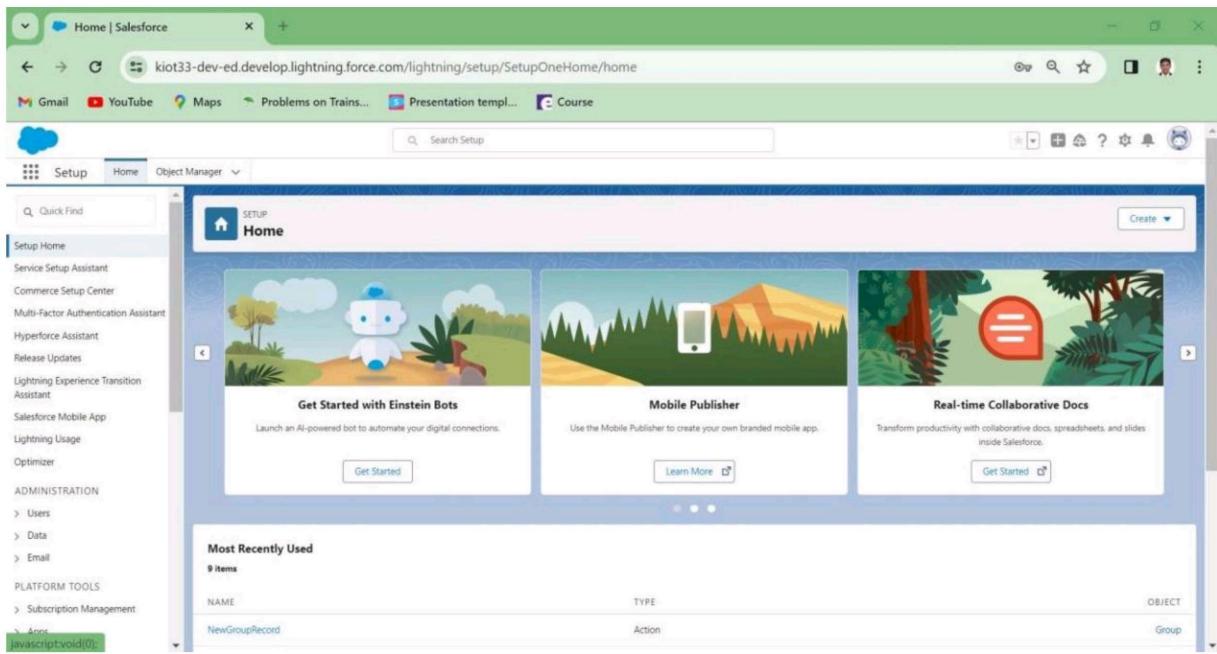
For this school management we need to create 3 objects School, Parents and Student. The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: School
6. Plural Label: Schools
7. Record Name: School Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

The screenshot shows the 'Edit Custom Object' screen for the 'School' object. The 'Label' field is set to 'School' and the 'Plural Label' is 'Schools'. The 'Record Name' field is set to 'School Name'. The 'Allow Reports' and 'Allow Search' checkboxes are checked. The 'Data Type' is set to 'Text'. Under 'Optional Features', 'Allow Reports' is checked. Under 'Object Classification', 'Allow Bulk API Access' and 'Allow Streaming API Access' are checked.

Now create a custom tab. Click the Home tab.



2.2 Create Student Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - On the Custom Object Definition page, create the object as follows:
 - Label: Student
 - Plural Label: Students
 - Record Name: Student Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox

- Click Save

The screenshot shows the 'Custom Object Definition Edit' page for a custom object named 'Student'. The 'Label' field is set to 'Student' and the 'Plural Label' is 'Students'. The 'Object Name' field is also set to 'Student'. There is a large text area for 'Description' which is currently empty. At the bottom, there are optional features like 'Allow Reports' (checked), 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Learning'. A note about object classification is present, stating that if these settings are enabled, the object is classified as an Enterprise Application object; otherwise, it's a Light Application object.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

2.3 Create Parent Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

4. On the Custom Object Definition page, create the object as follows:

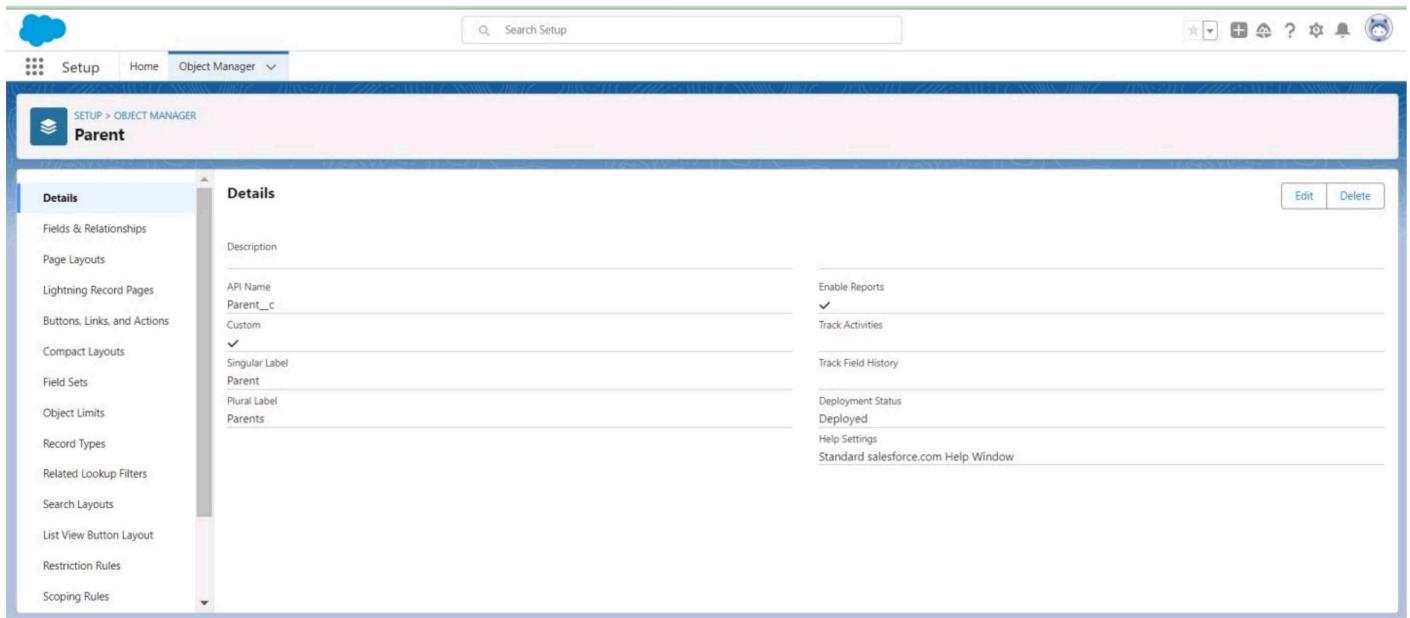
- Label: Parent
- Plural Label: Parents
- Record Name: Parent Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.Under Custom Object Tabs, click New.

1. For Object, select Parents.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

The screenshot shows the Salesforce Setup interface under the Object Manager section. A new custom object is being created with the following details:

- Object Name:** Parent
- Label:** Parent
- Plural Label:** Parents
- Record Name:** Parent Name
- Allow Reports:** Checked
- Allow Search:** Checked
- Description:** (Empty)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected)
- Content Name:** (None)
- Enter Record Name Label and Format:** The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name: Parent Name
 - Data Type: Text
- Optional Features:**
 - Allow Reports (checked)
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Object Classification:** When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
 - Allow Sharing (checked)
 - Allow Bulk API Access (checked)
 - Allow Streaming API Access (checked)



3.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 - **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.

Note: The description, Logo, and Label of standard app cannot be altered.

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

22 items • Sorted by App Name • Filtered by All appmenutems - TabSet Type			
App Name †	Developer Name	Description	Last Mod
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	22/08/20
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/20
3 App Launcher	AppLauncher	App Launcher tabs	22/08/20
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/08/20
5 Community	Community	Salesforce CRM Communities	22/08/20
6 Content	Content	Salesforce CRM Content	22/08/20
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	22/08/20
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/20
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/20
10 Marketing	Marketing	Built-in-class on-demand marketing automation	22/08/20
11 Platform	Platform	The fundamental Lightning Platform	22/08/20
12 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/20
13 Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/20
14 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	22/08/20
15 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	22/08/20
16 SalesForce Chatter	Chatter	The SalesForce Chatter social network, including profiles and feeds	22/08/20
17 SalesForce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	22/08/20

Note: Logos for Custom Apps can be changed.

3.1 Create The School Management App

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.

The screenshots show the Salesforce App Manager setup interface. The left sidebar navigation includes 'Salesforce Mobile App', 'Data', 'Apps' (with 'App Manager' selected), 'Connected Apps', 'External Client Apps', and 'Lightning Bolt'. The right main area displays two configuration tabs:

- Basic Information**: Fields include Connected App Name (School Management), API Name (School_Management), Contact Email (prschool@gmail.com), Contact Phone (empty), Logo Image URL (empty), Icon URL (empty), Info URL (empty), and Description (empty). A note indicates 'Required Information'.
- API (Enable OAuth Settings)**: Contains a checkbox for 'Enable OAuth Settings' which is unchecked.
- PIN Protect**: Fields include App Platform (dropdown), Restrict to Device Type (dropdown), App Version (text input), Minimum OS Version (text input), Private App (checkbox), App Binary URL (text input), and Push Messaging Enabled (checkbox).
- Canvas App Settings**: Contains a checkbox for 'Canvas' which is unchecked.

To verify your changes, click the App Launcher, type School Management and select the School Management app.

- App Launcher-Displays available apps.
- App Name-Displays the current selected app.
- Navigation menu -Displays the tabs available inside the app.

3.2 Creation Of Fields For The School Objects

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.



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager. A search bar at the top right contains the text 'school'. Below the header, the title 'Object Manager' is displayed above a table. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed. One row is visible, showing 'School' as the Label, 'School_c' as the API Name, 'Custom Object' as the Type, and '17/10/2023' as the Last Modified date. The Deployed column shows a checkmark.

4. Select Fields & Relationships from the left navigation

5. Click New

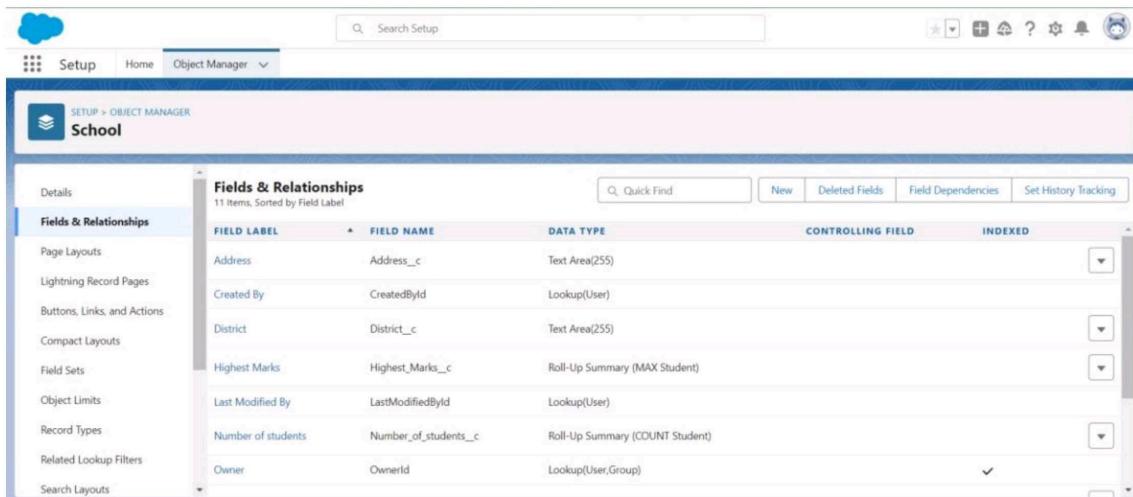
6. Select the Text Area as the Data Type, click Next.

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 Schoolwebsite as the field label.



The screenshot shows the 'Fields & Relationships' section for the 'School' object. On the left, there is a sidebar with options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area displays a table titled 'Fields & Relationships' with 11 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Created By	CreatedBy	Lookup(User)		
District	District_c	Text Area(255)		
Highest Marks	Highest_Marks_c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedBy	Lookup(User)		
Number of students	Number_of_students_c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User,Group)		

Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type. Let's see this

Note- Follow above steps 1 to 5 to create field and then follow below steps

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

The screenshots illustrate the creation of custom fields in the Salesforce Object Manager. In the top screenshot, the 'Student' object is being edited, showing its details and various configuration tabs like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. A custom field named 'Phone Number' has been added with the API name 'Phone_Number__c'. In the bottom screenshot, the 'School' object is being edited, and another custom field 'Phone Number' is being configured with the same API name 'Phone_Number__c'. Both fields are of type 'Phone'.

Creation Of Fields For The Student Objects

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New
4. Select the E-mail as the Data Type, then click Next 5. For Field Label, enter E-mail.

The screenshot shows the Salesforce Setup interface for creating a custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area is titled 'Student Custom Field' and 'Phone Number'. The 'Field Information' section contains the following details:

Field Label	Phone Number	Object Name	Student
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below this, the 'General Options' section includes fields for 'Created By' (Balaji.S.S. 17/10/2023, 10:49 am) and 'Modified By' (Balaji.S.S. 17/10/2023, 10:49 am). A 'Required' checkbox is also present.

The screenshot shows the Salesforce Setup interface for editing a custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area is titled 'Edit Student Custom Field' and 'E-mail'. The 'Custom Field Definition Edit' screen displays the following information:

Field Label	E-mail	Data Type	Email
Field Name	E_email		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	Available PII HIPAA	Chosen	

The screenshot shows the Salesforce Setup interface for viewing the custom field 'E-mail' for the Student object. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area is titled 'Student Custom Field' and 'E-mail'. The 'Custom Field Definition Detail' screen displays the following information:

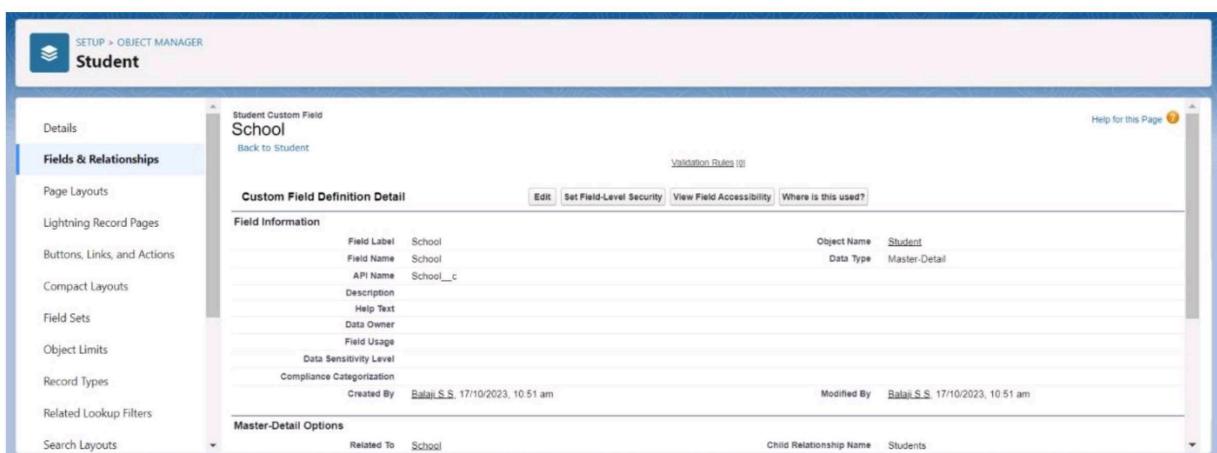
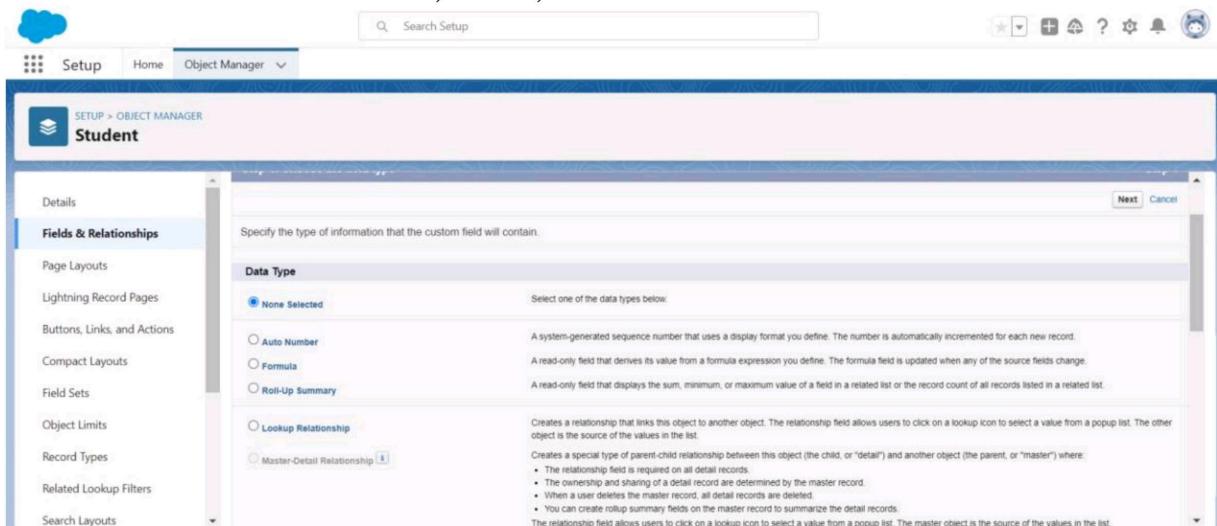
Field Label	E-mail	Object Name	Student
Field Name	E_email	Data Type	Email
API Name	E_email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below this, the 'General Options' section includes fields for 'Created By' (Balaji.S.S. 17/10/2023, 10:50 am) and 'Modified By' (Balaji.S.S. 17/10/2023, 10:50 am). A 'Required' checkbox is also present.

Let's create a **master-detail relationship** with School object

Note- Follow above steps 1 to 5 to create field and then follow below steps

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.



Let's create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
Pass
Fail
6. Pass
7. Fail
8. Click Next, Next, then Save & New

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various icons. The main title is 'SETUP > OBJECT MANAGER' under the 'Student' object. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Edit Student Custom Field Results'. It contains a 'Custom Field Definition Edit' form with the following settings:

- Field Information:** Field Label is 'Results', Field Name is 'Results', Description is empty, Help Text is empty.
- Data Type:** Picklist.
- Field Owner:** User.
- Field Usage:** None.
- Data Sensitivity Level:** None.
- Compliance Categorization:** Available (PII, HIPAA) and Chosen.

Let's create a Number field:

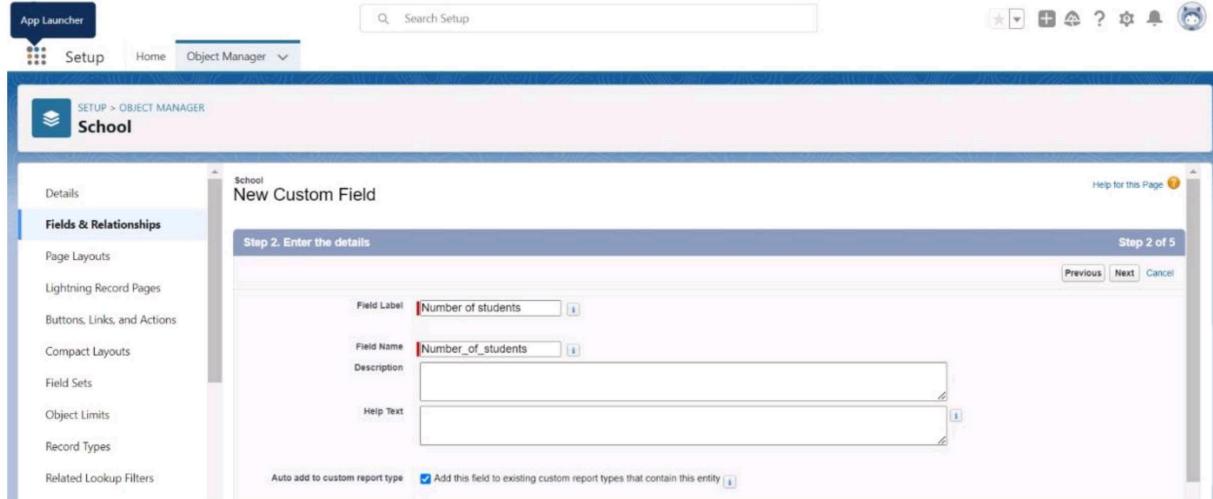
1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter **Class**.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with **Marks** as the field labels.

Let's create **Roll-up summary** fields on **School** Object to calculate the number of students

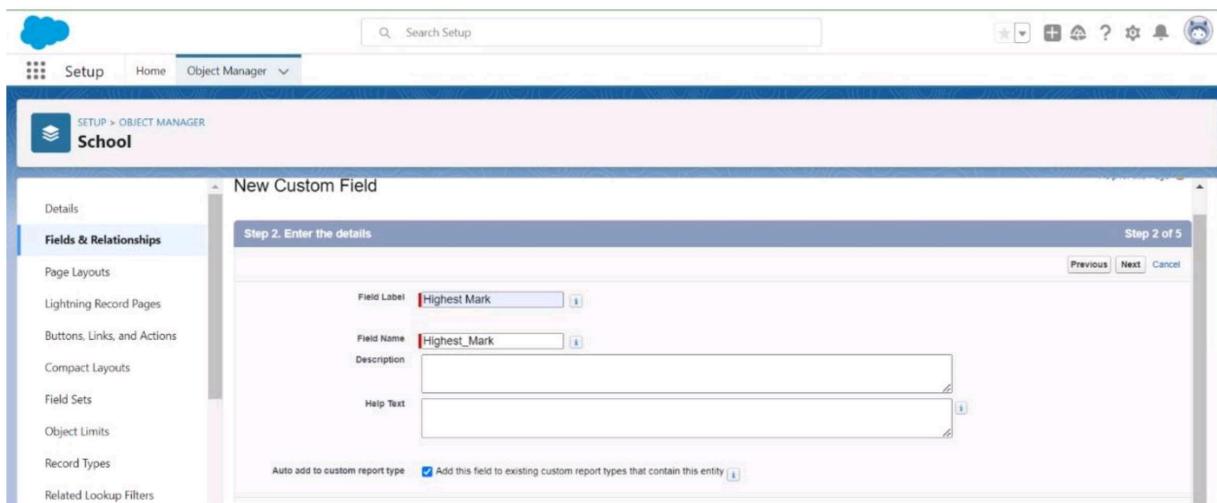
1. Click gear icon Select Setup, This launches Setup in a new tab.
2. click Object Manager
3. Select **School**.
4. Click Fields & Relationships
5. Click New.
6. Select the Roll-up summary field as data type
7. Enter the field label as Number of students
8. Click Next

9. Then select the master object summarized as students
10. Select count as roll-up andthen click Next, Next and save.

Create one more rollup summary field-

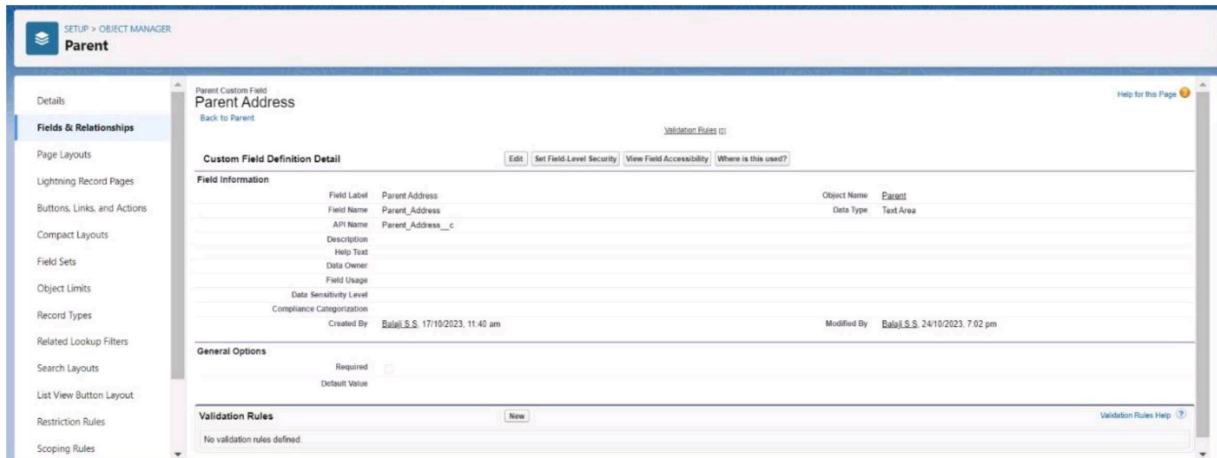


- From Setup, click Object Manager and select School.
- Click Fields & Relationships, then New.
- Select the Roll-up summary field as data type
- **Enter the field label as Highest Marks**
- Click Next
- Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate.
- click Next, Next and save.



Creation Of Fields For The Parent Objects

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.
4. Select the Phone as the Data Type, then click Next.
5. For Field Label, enter Parent Number.



6. Click Next, Next, then Save & New

The screenshot shows the 'Custom Field Definition Edit' page for the 'Parent' object. The 'Field Information' section is displayed, with the 'Field Label' set to 'Parent Address' and the 'Field Name' set to 'Parent_Address'. The 'Data Type' is selected as 'Text Area'. Under 'Compliance Categorization', 'Available' categories like PII, HIPAA, GDPR, and PCI are listed, while 'Chosen' only has 'PII' selected. Other tabs like 'General Options' and 'Validation Rules' are visible at the bottom.

The screenshot shows the 'Custom Field Definition Detail' page for the 'Parent' object. The 'Field Information' section displays the field details: 'Field Label' is 'Parent Number', 'Field Name' is 'Parent_Number', and 'API Name' is 'Parent_Number__c'. The 'Object Name' is 'Parent' and the 'Data Type' is 'Phone'. The 'Validation Rules' section indicates 'No validation rules defined'.

4.PROFILE

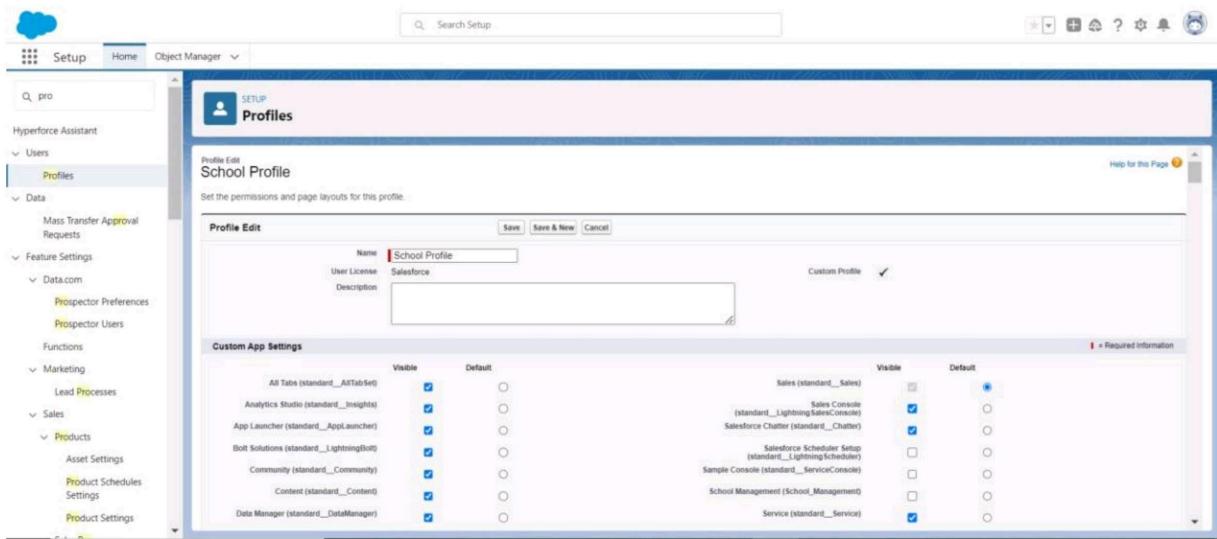
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges

5.1Creation On Profile 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
4. Click **Save**.
5. While still on the School profile page, then click **Edit**.
6. Scroll down to Custom Object Permissions and Give view all access permissions.



5. 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.

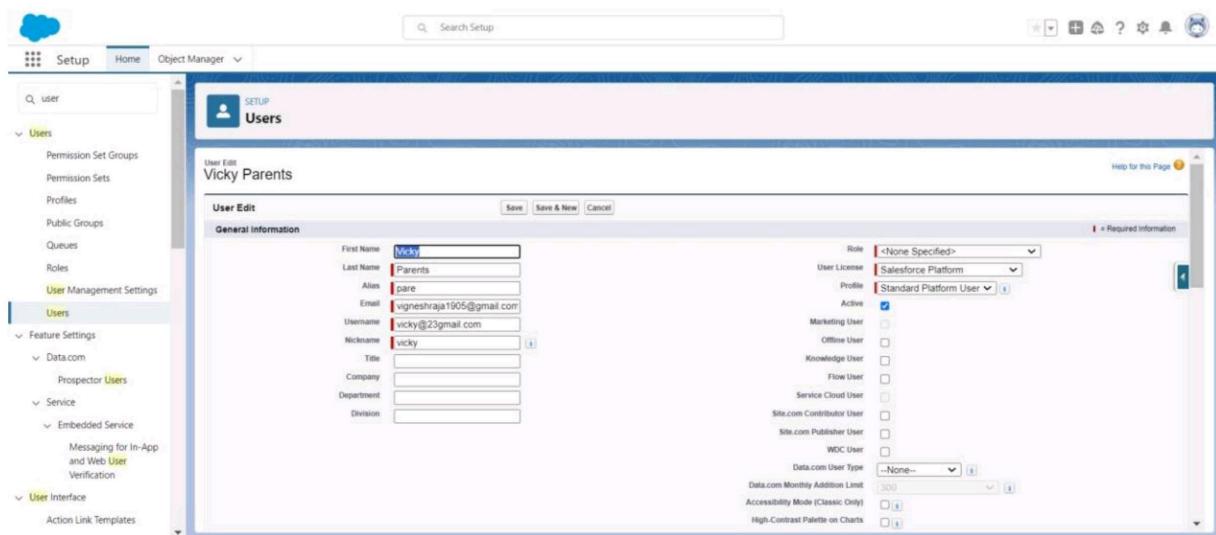
5.1 Creating A User

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

6.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.

6.1Create A Permission Set

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.

Under the object settings give the view create and edit permissions to all 3 custom objects (By click open the object) 4. Click on manage assignment
 5. Click on add assignment.
 6. Click on Teacher (user), Next, Assign.

Permission Set Overview

Setting	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0

API Name: teacher_permission
Namespace Prefix:
Created By: Balaji S.S. 17/10/2023, 1:55 pm
Last Modified By: Balaji S.S. 17/10/2023, 2:02 pm

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access
- External Data Source Access

6.2 Create A Another Permission Set

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 Principal permission and then under the object settings give all permissions for the all 3 custom objects and assign them to the Principal user.

Permission Set Overview

Setting	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0

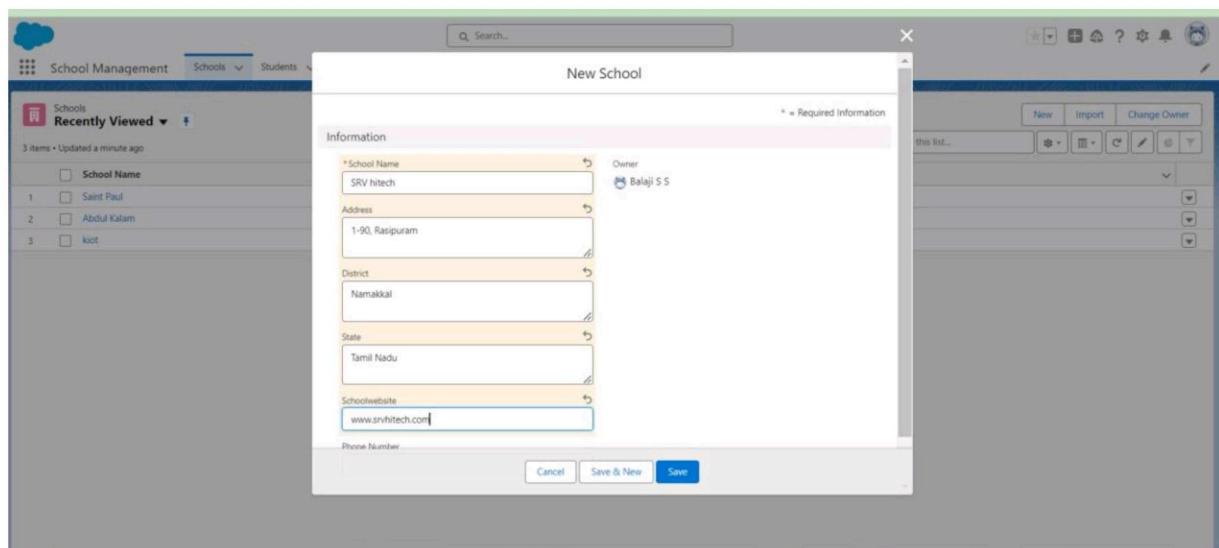
API Name: Principal_permission
Namespace Prefix:
Created By: Balaji S.S. 17/10/2023, 2:27 pm
Last Modified By: Balaji S.S. 17/10/2023, 2:30 pm

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access
- External Data Source Access

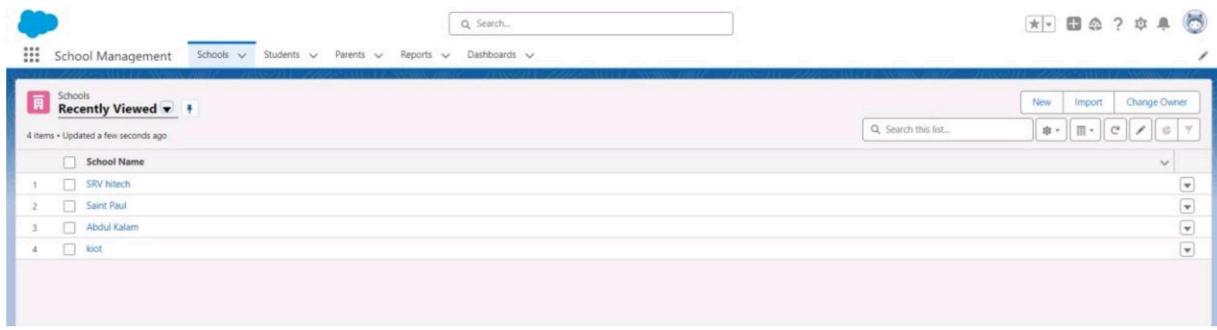
7.Create Record (School)

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



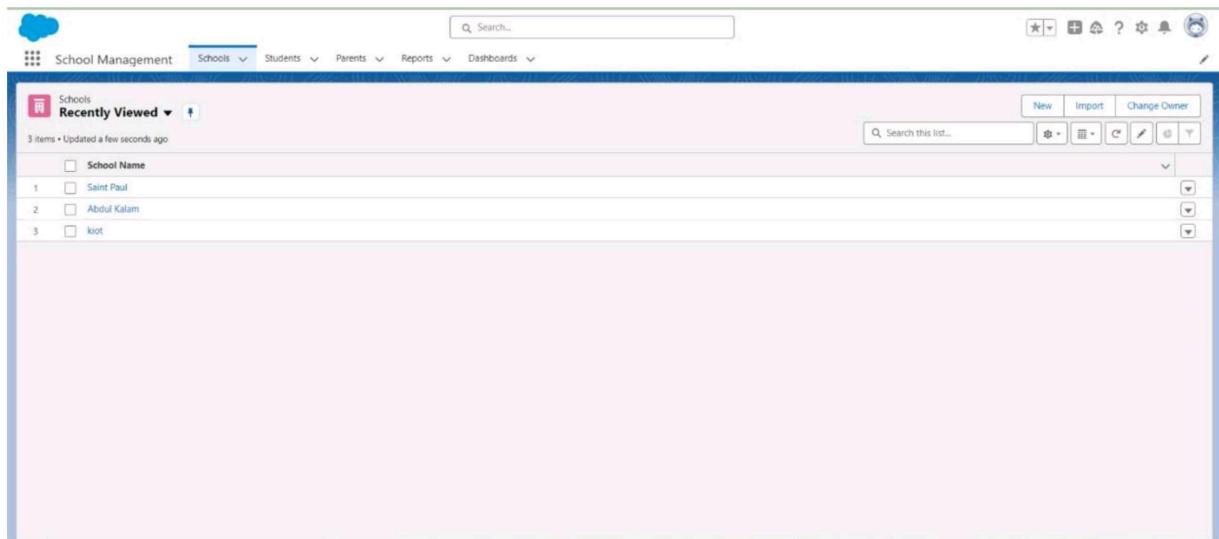
8. View Record (School)

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 on any record name.** you can see the details of the School.



9.Delete 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 on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



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. There are 4 types of report formats in Salesforce:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot

be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

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

The screenshot shows a Salesforce application window titled "School Management". The top navigation bar includes "School Management", "Schools", "Students", "Parents", "Reports", and "Dashboards". The main content area is titled "Report: Schools with Students" and "Schools with Students Report". It displays a table with the following data:

School: School Name	Student: Student Name
1 Abdul Kalam	sanjay
2 Saint Paul	Mega V
3 Saint Paul	Priya B

View Report

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

The screenshot shows a Salesforce application window titled "School Management". The top navigation bar includes "School Management", "Schools", "Students", "Parents", "Reports", and "Dashboards". The main content area is titled "Report: Schools with Students" and "Schools with Students Report". It displays a table with the following data:

School: School Name	Student: Student Name
1 Abdul Kalam	sanjay
2 Saint Paul	Mega V
3 Saint Paul	Priya B

11.Triggers

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

Salesforce platform, such as when a record is inserted, updated, deleted, or undeleted. Triggers are used to automate business processes, enforce data integrity, and perform custom logic on data.

A before trigger in Salesforce is executed before the records are actually inserted, updated, or deleted in the Salesforce database. This allows the trigger to perform certain actions or validations before the data is saved to the database.

Create An Apex Trigger

1. Go to the gear icon and select the developer console.
 2. From the menu bar click on file and select Apex class.
 3. Now give the class name as schoolHandler 4. Now Write the below code
- ```
public class schoolHandler {
 public static void beforeDelete(list<School__c>
 oldlist){ for(School__c s : oldlist){
 if(s.Schoolwebsite__c == null){
 saddError('you cannot delete the record');
 }
 }
 }
}
```
1. From the menu bar click on file and select Apex trigger.
  2. Now give the trigger name as Internalmarks
  3. Now write the below code
- ```
trigger SchoolTrigger on  
School__c (before delete) {  
    if(trigger.isDelete){      if(trigger.isBefore){  
        schoolHandler.beforeDelete(trigger.old);  
    }  
}
```

}

}

The image consists of three vertically stacked screenshots of the Salesforce IDE. Each screenshot shows a code editor at the top and a test results table at the bottom.

Screenshot 1 (Top): The code editor shows a trigger named Internalmarks. The trigger logic is:

```
1 trigger Internalmarks on School__c (before delete) {
2     if(trigger.isDelete)
3         if(trigger.isBefore)
4             schoolHandler.beforeDelete(trigger.old);
5 }
```

The test results table below shows:

Status	Test Run	Enqueued Time	Duration	Failures	Total
Overall	0%			0/3	
Internalmarks	0%			0/3	
schoolHandler	0%			0/4	

Screenshot 2 (Middle): The code editor shows a class named schoolHandler with a static method beforeDelete. The method logic is:

```
1 public class schoolHandler {
2     public static void beforeDelete(List<School__c> oldList) {
3         for(School__c s : oldList){
4             if(s.Schoolwebsite__c == null )
5                 saddError('you cannot delete the record');
6         }
7     }
8 }
```

The test results table below shows:

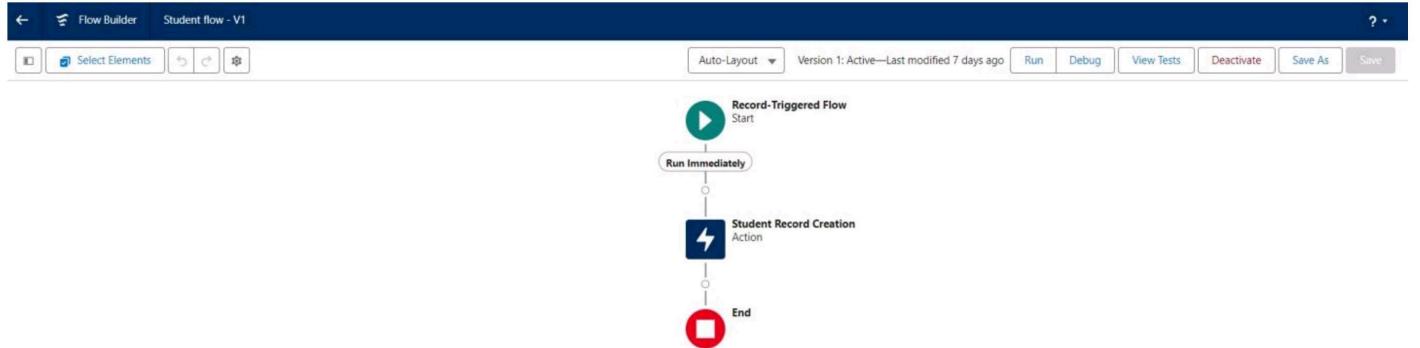
Status	Test Run	Enqueued Time	Duration	Failures	Total
Overall	0%			0/3	
Internalmarks	0%			0/3	
schoolHandler	0%			0/4	

Screenshot 3 (Bottom): This screenshot is identical to Screenshot 2, showing the same code and test results.

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.



Flow Label	Process Type	Active	Template	Package State	Last Modified Date	Last Modified User
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 type="checkbox"/>	Unmanaged	Balaji 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		

13.GitHub & Project Video Demo Link

GitHub Link:

<https://github.com/2k20csbs46/Phase-1> Video Link:

[**https://drive.google.com/drive/folders/1jaPZNPNi_nmleW4MiSEK57sJ1x
o B8Sr-?usp=sharing**](https://drive.google.com/drive/folders/1jaPZNPNi_nmleW4MiSEK57sJ1xoB8Sr-?usp=sharing)