

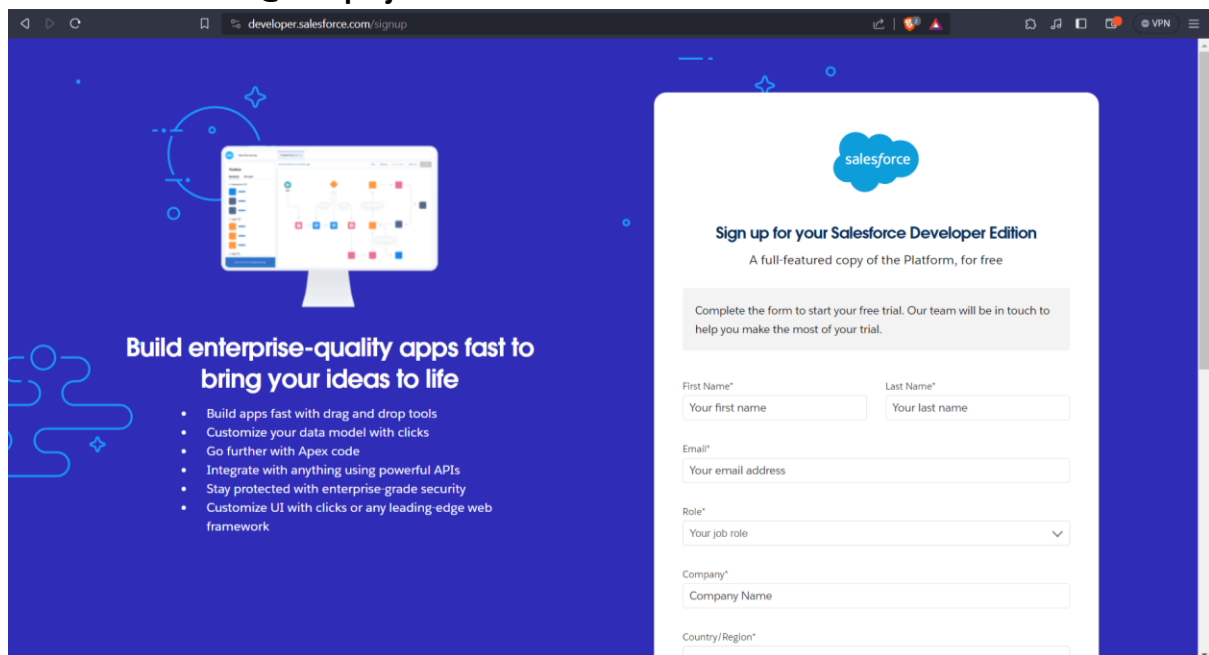
Project Report on CRM Application for School Management

Developer - (Short-Term)

Introduction: The creation of an application for school management is a multifaceted and innovative approach to streamline the administrative, academic, and communication processes within educational institutions. This application serves as a digital hub, offering a centralized platform for teachers, students, parents, and school administrators to efficiently manage various aspects of the school ecosystem.

Milestone – 01: Create a Developer Org

1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name – **ANSON ANTONY S**
 - b. Email – **sansonmsa@gmail.com**
 - c. Role : **Developer**
 - d. Company : **UCEN**
 - e. County : **India**
 - f. Postal Code : **629002**
 - g. Username : **anson@ucenproject.com**



developer.salesforce.com/signup

salesforce

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Your country or region

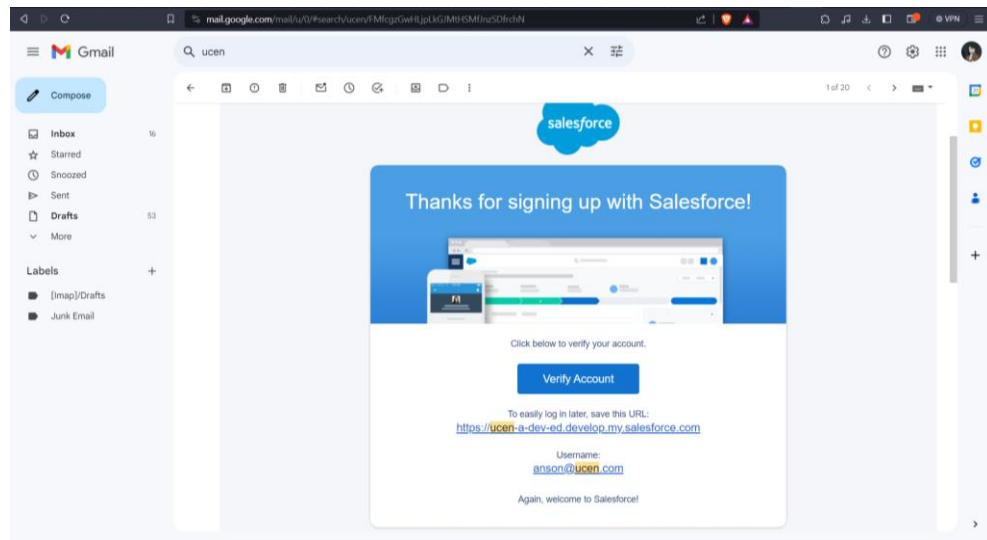
Build enterprise-quality apps fast to bring your ideas to life

- 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
- Customize UI with clicks or any leading-edge web framework

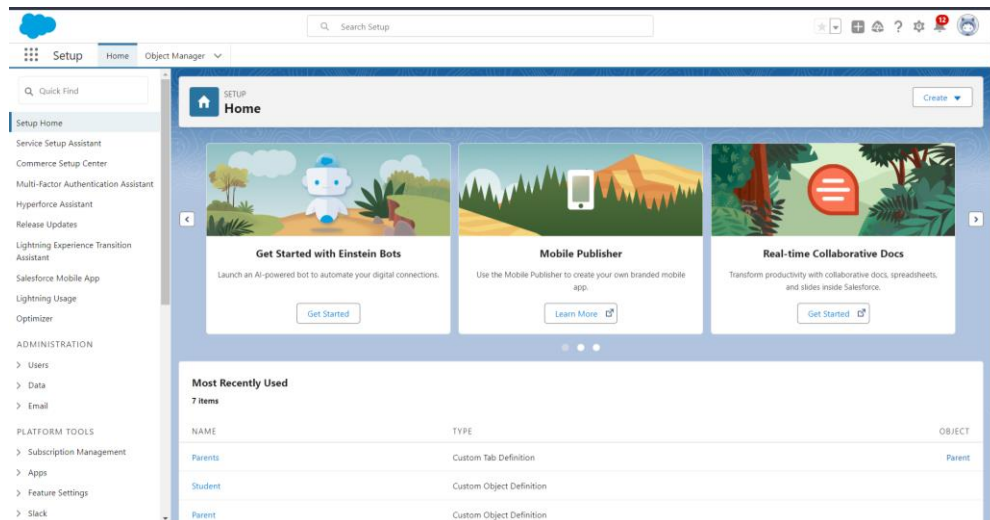
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

The email may take 5-10mins, as



1. Login To Your Salesforce Account
2. Go to salesforce.com and click on login.
3. Enter the username and password that you just created.
4. After login this is the home page which you will see.



Milestone – 02: objects creation

Object – Student

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: **Student**
6. Plural Label: Students
7. Record Name: Student Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save

Object – Parent

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 Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Parent**
6. Plural Label: Parents
7. Record Name: **Parent Name** (Auto Number)
8. Check the Allow Reports check box
9. Check the Allow Search check box and Click Save

| NAME | TYPE | OBJECT |
|---------|--------------------------|--------|
| Parents | Custom Tab Definition | Parent |
| Student | Custom Object Definition | |




Milestone – 03: Creation of Tabs

Tab- Passport Object

1. Navigate to setup and home
 2. Enter Tabs in Quick Find Box and select Tabs
 3. Under Custom Object Tabs, click New
 4. For Object, select **Parent**
 5. For Tab Style, select any icon
 6. Leave all defaults as is. Click Next, Next, and Save **Parent-slot**
1. Navigate to setup and enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.
 2. For Object, select **Parent Slot**.
 3. For Tab Style, select any icon.
 4. Leave all defaults as is. Click Next, Next, and Save

Tab – Student

1. Navigate to setup and enter Tabs in Quick Find and select Tabs Under Custom Object Tabs, click New
2. For Object, select **Student**
3. For Tab Style, select any icon
4. Leave all defaults as is. Click Next, Next, and Save

| Custom Object Tabs | | | New What Is This? |
|--|--------------------------|--|---|
| Action | Label | Tab Style | |
| Edit Del | Parents |  Sun | |
| Edit Del | Schools |  Books | |
| Edit Del | Students |  Laptop | |

Milestone – 05 : Field creation

Field creation : School

1. Field Name: Address
2. Full Name: Text
3. Contact Number: Number
4. Address Number: Text
5. Permanent Address: Text

Field creation: Students

1. Navigate to Setup
2. Click the Object Manager next to Home Tab
3. Type Student in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Text, click on next
7. Field Label: Phone Number
8. Length: Max 10
9. Check always requires a value to save this record
10. Click next
11. Next, Save or Save & New (if further new field will be create)

Field Creation-Email

1. Navigate to Setup
2. Click the Object Manager next to Home Tab
3. Type Student in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Email , click on next
7. Field Label: Email
8. Click on next
9. Next, Save.

Field Creation- Permanent Address

1. Navigate to Setup
2. Click the Object Manager next to Home Tab
3. Type Passport in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Text Area, click on next
7. Field Label: Permanent Address
8. Next, next and save

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER > Passport'. The main content area is titled 'Fields & Relationships' for the 'Passport' object, showing 7 items sorted by Field Label. A left sidebar lists various setup options, with 'Fields & Relationships' currently selected. The main table lists the following fields:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------------|----------------------|--------------------|-------------------|---------|
| Contact Number | Contact_Number__c | Number(10, 0) | | |
| Created By | CreatedById | Lookup(User) | | |
| Full Name | Full_Name__c | Text(80) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Passport Number | Name | Text(80) | | ✓ |
| Permanent Address | Permanent_Address__c | Text Area(255) | | |

Fields Available On Custom Object: Student

| Slot Field Name | Data Type |
|------------------|-----------------|
| Location | : Text |
| Time | : Date & Time |
| Visa Slot Number | : Auto Number |
| Passport Number | : Master-Detail |
| Status | : picklist |

Creation Status

1. Click on Object Manager, search and select Student Slot
2. Click Fields & Relationships and click on new.
3. Chose on picklist, next.
4. Next, next and save.

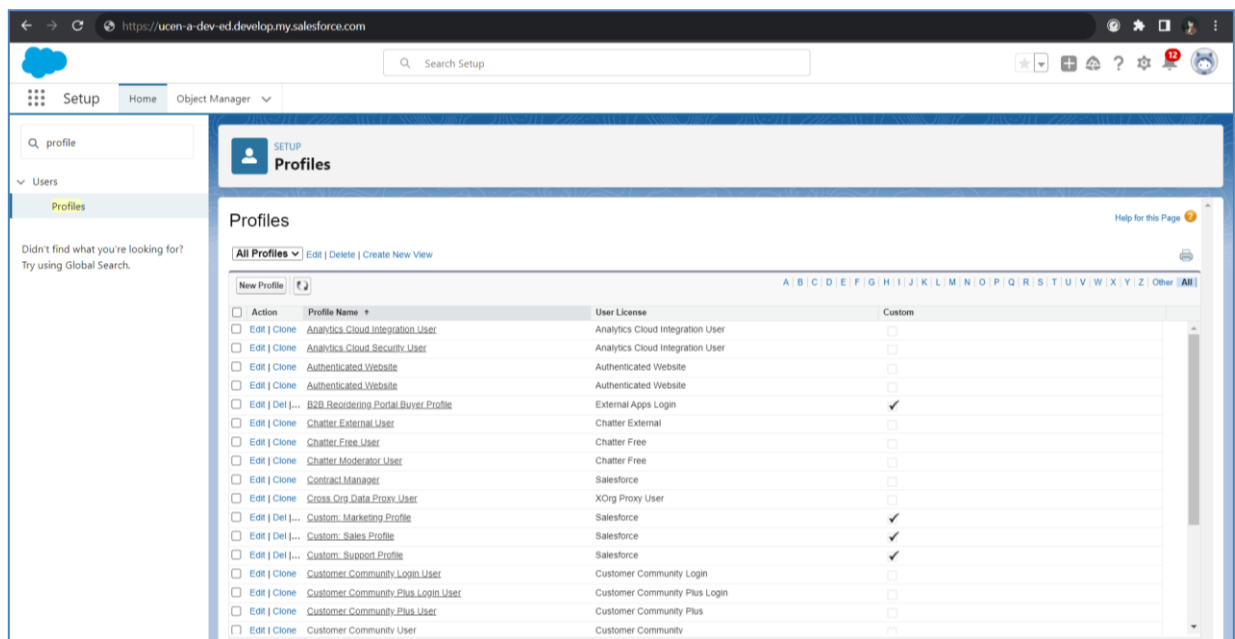
The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Object Manager' as the selected option. The main content area is titled 'SETUP > OBJECT MANAGER Parent'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The 'Details' section is currently selected, displaying a table of object properties. The table has two columns: 'Property' and 'Value'. The properties listed are: Description (empty), API Name (Parent__c), Custom (checked), Singular Label (Parent), Plural Label (Parents), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and a link to 'Standard salesforce.com Help Window'. At the top right of the details section, there are 'Edit' and 'Delete' buttons.

| Property | Value |
|-------------------------------------|-------------------------------------|
| Description | |
| API Name | Parent__c |
| Custom | ✓ |
| Singular Label | Parent |
| Plural Label | Parents |
| Enable Reports | ✓ |
| Track Activities | ✓ |
| Track Field History | ✓ |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |
| Standard salesforce.com Help Window | |

Milestone - 06 : Creation on Profile

Creation of Profile

1. From setup, enter Profiles from Quick Find Box
2. Select Profiles
3. Click new, Choose Standard User
4. For Profile Name, Enter School Profile
5. Click Save
6. From School Profile Page, click edit
7. Scroll down to custom object permissions and give view all access permissions



Milestone- 07 : User

Creation Of User

1. Navigate to setup
2. In Quick Find box select and search: User
3. Click: New user
4. Give First and Last Name
5. Enter your email in the email field
6. Enter user name, it must be unique
7. User license: salesforce platform
8. In the profile field: Standard user profile
9. Check, Generate new password and notify user immediately
10. Save

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings

Users

Feature Settings
Data.com
Prospector Users

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

SETUP Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** Edit Create New View

New User Reset Password(s) Add Multiple Users

| Action | Full Name ↑ | Alias | Username | Role | Active | Profile |
|-------------------------------|------------------|---------|--|------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Antony S. Anson | AAnto | anson@ucen.project | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty.00d5h000008ospzead4.mcbbgx0115gr@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | User Integration | integ | integration@00d5h000008ospzead4.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightssecurity@00d5h000008ospzead4.com | | ✓ | Analytics Cloud Security User |

New User Reset Password(s) Add Multiple Users

Organization Wide Defaults Settings

1. Steps of OWD settings:
2. Navigate setup in Quick Find search bar
3. Type Sharing Setting and Select it.
4. Edit: Organization Wide Defaults.
5. Scroll down list and select Passport object and change the default external Access to Public Read/Write.
6. Save.

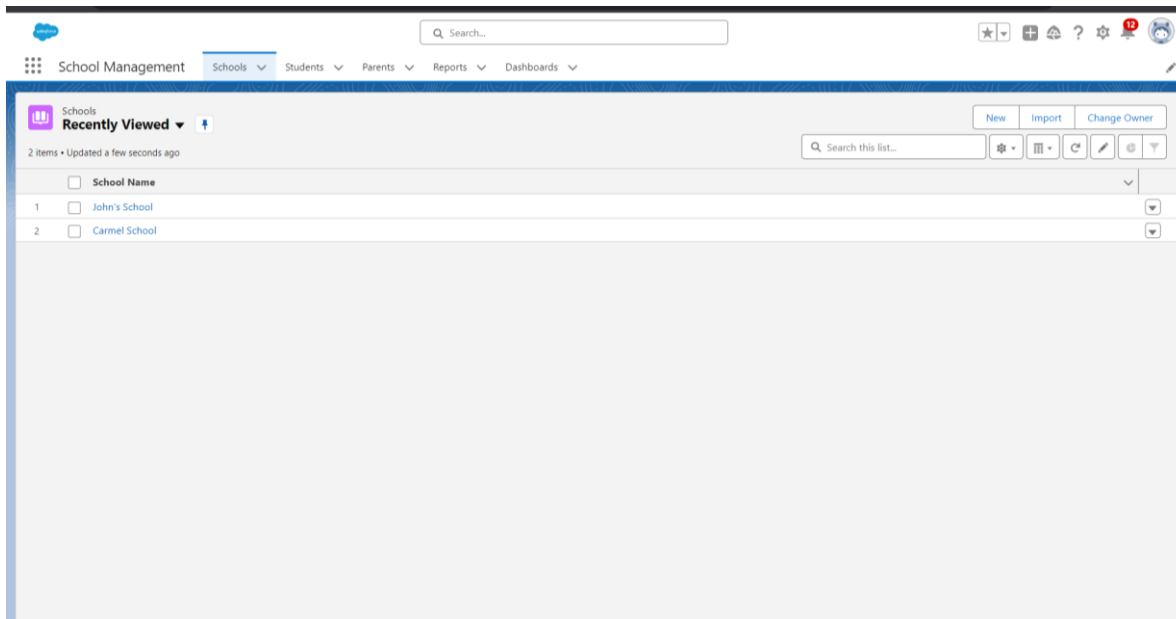
Milestone - 08 : User Adoption

Create Record- School

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Passport tab.
4. Click new button
5. Fill all School Name record details.
6. Click on Save Button.

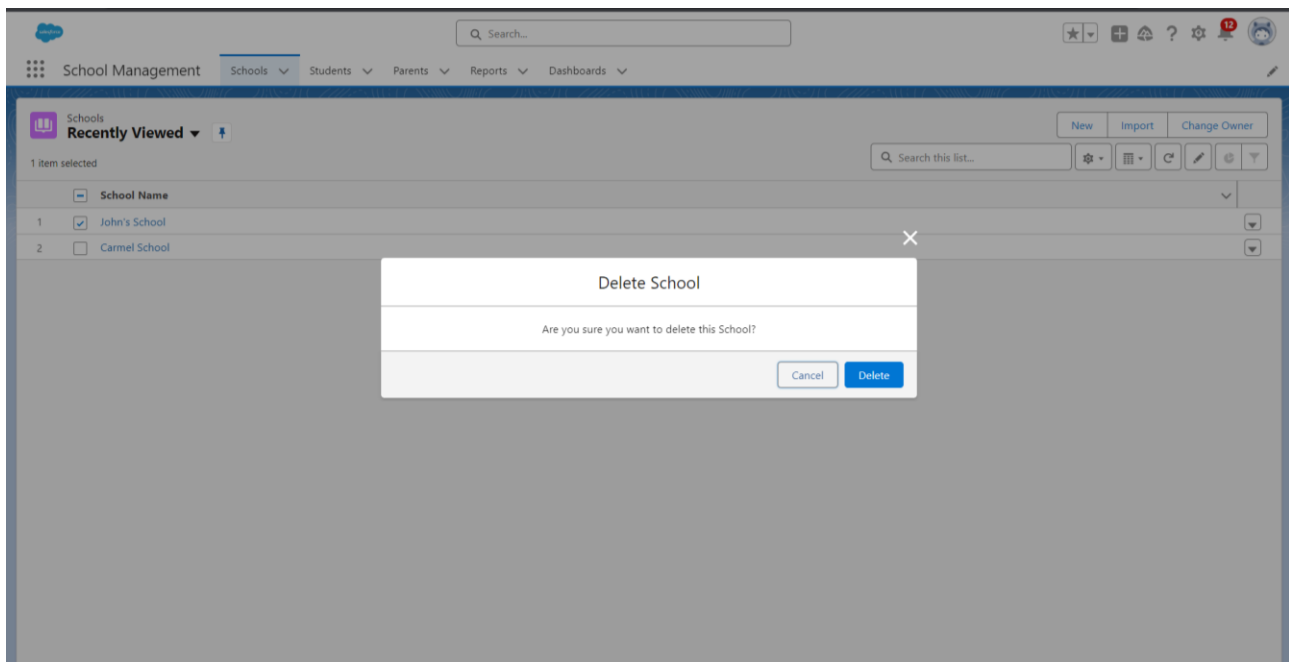
View Record- School

1. Click on App Launcher on left side of screen.
2. Search School Management & click on it.
3. Click on Schools Tab.
4. Click on any record name. you can see the details of the Driver



Delete Records - School

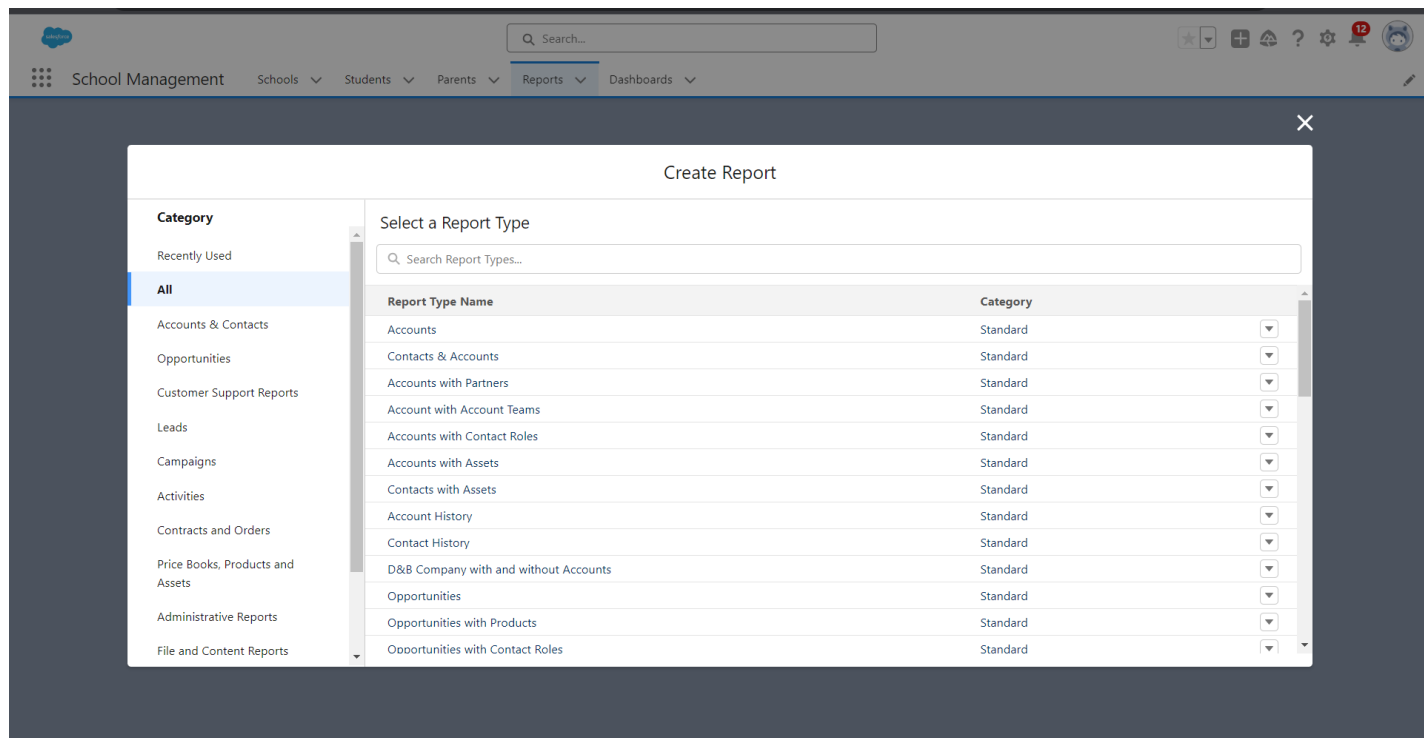
1. Click on App Launcher on left side of screen.
2. Search School Management & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



Milestone - 09 : Reports

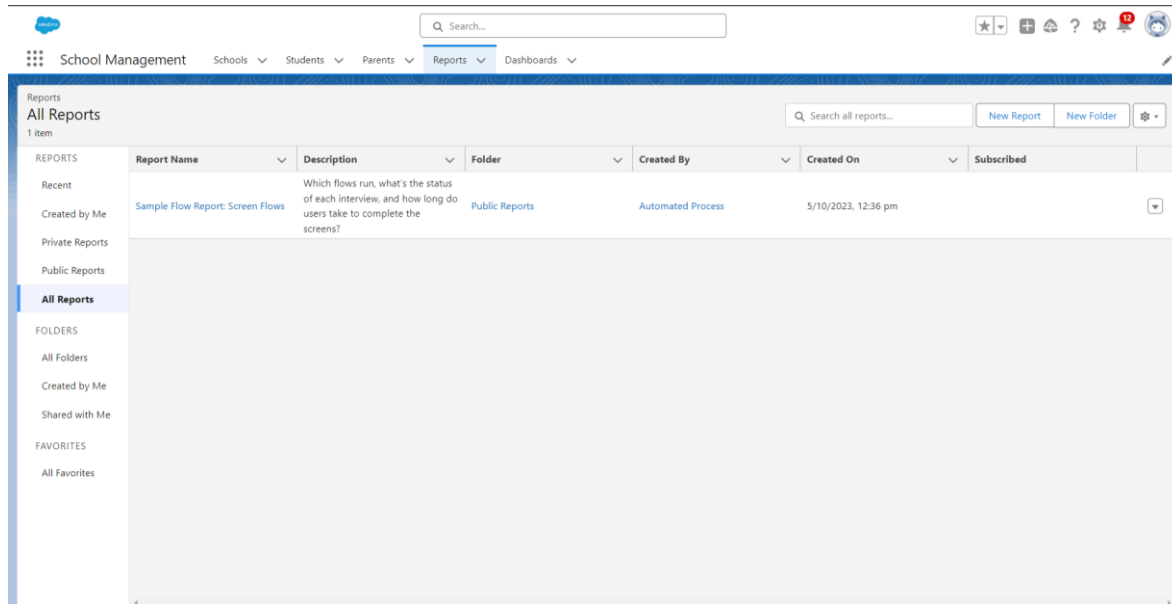
Creation Of Report

1. In School Management App, clicks Reports Tab
2. Click Report- select New Report
3. Select Report Type as School with Students and parents for the report
4. Click on Start Report button
5. Customize the report, then save and run
6. Give Report Name - School with Students Report
7. Analyse the reports for each students
8. This report provides insight regarding the students performance
9. Click Save



Report

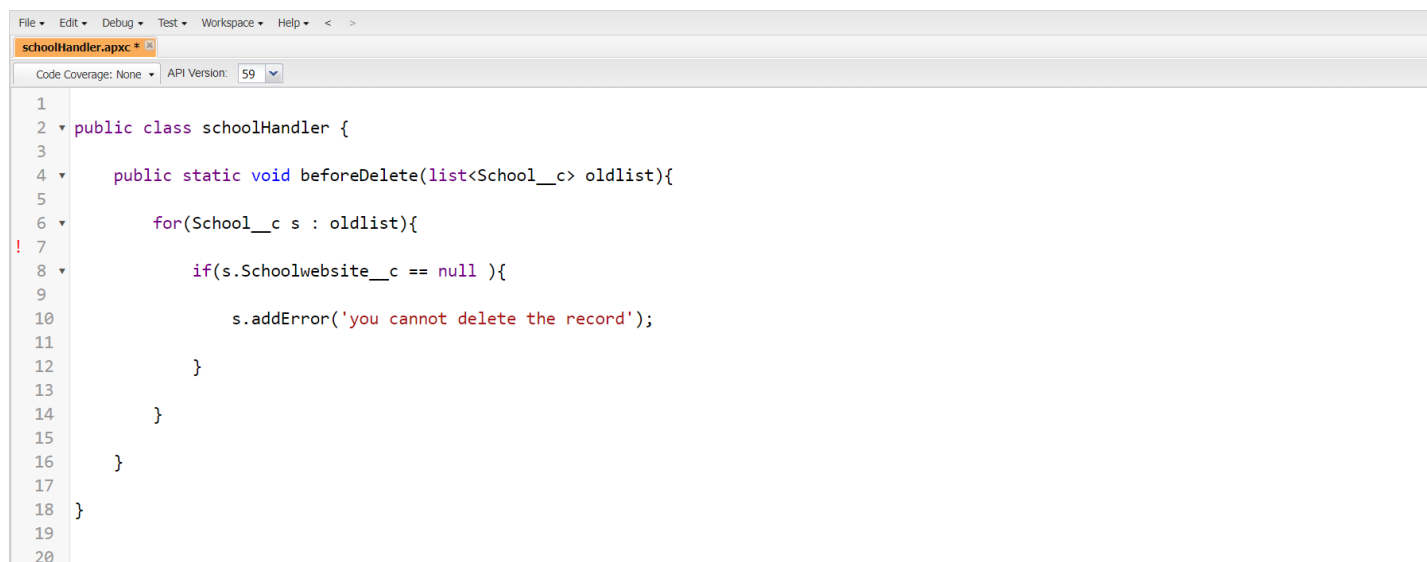
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Reports Tab.
4. See reports.



Milestone – 10: Apex Triggers

Write A Trigger:

1. Click on Set up Gear at drop down list you can find developer console click on that.
2. At the left side top you can find the option new click on that and then apex class and give the name as **schoolHandler**



Write A Trigger-2

1. Click on Set up Gear at drop down list you can find developer console click on that.
2. At the left side top you can find the option new click on that and then apex trigger.
3. Give the name as **InternalMarks**

```
File Edit Debug Test Workspace Help < >
schoolHandler.apxc InternalMarks.apxt
Code Coverage: None API Version: 59 Go To

1 trigger SchoolTrigger on School__c (before delete) {
2
3     if(trigger.isDelete){
4
5         if(trigger.isBefore){
6
7             schoolHandler.beforeDelete(trigger.old);
8
9         }
10
11     }
12 }
13 }
14
15
```

Milestone-11: Create Flow

Create a Flow:

1. Click on gear icon, click Setup
2. In Quick Find, search for flows and select the flows
3. Click on flows and select the Record Triggered Flows

Select Elements

Record-Triggered Flow Start

Run Immediately

Add Element

email

Send Email Alert

Send Email

End

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object

Student

Configure Trigger

*Trigger the Flow When:

☒ A record is created

☐ A record is updated

☐ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None