

PROJECT REPORT ON CREATION OF APPLICATION FOR SCHOOL MANAGEMENT

Introduction:

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 crosstechnology 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.

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/Signup
2. Click on sign up.
3. On the sign-up form, enter the following details:
 1. First name & Last name:Gowthami Neeluri
 2. Email:neelurigowthami1@gmail.com
 3. Role: Developer
 4. Company: sree vidyanikethan degree college
 5. County: India
 6. Postal Code: 517102
 7. Username:neelurigowthami1@gmail.com

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First Name*
Gowthami

Last Name*
Neeluri

Email*
neelurigowthami1@gmail.com

Role*
Developer

Company*

Account Activation

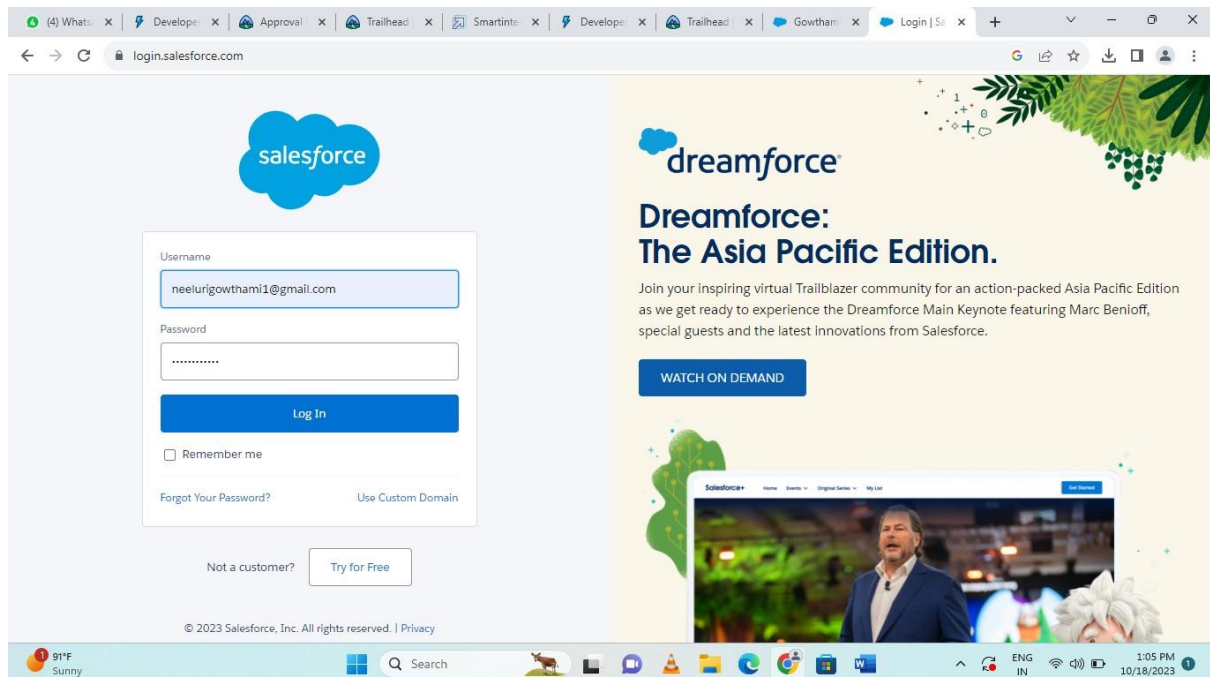
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

The email may take 5-10mins, as

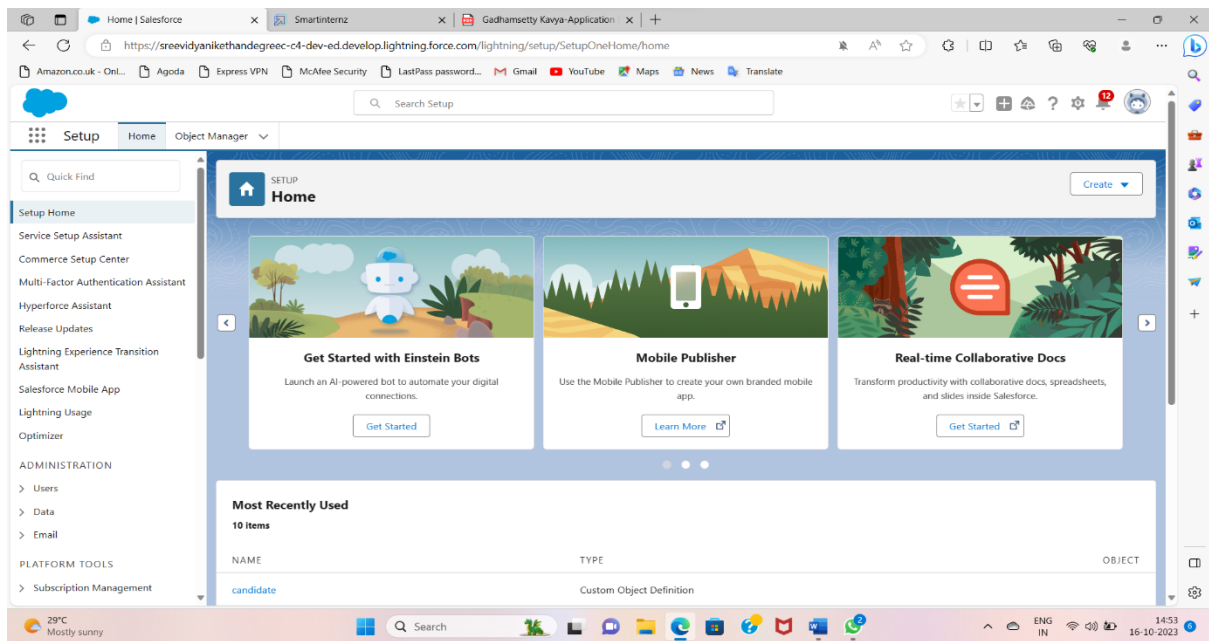


Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.



3. After login this is the home page which you will see.

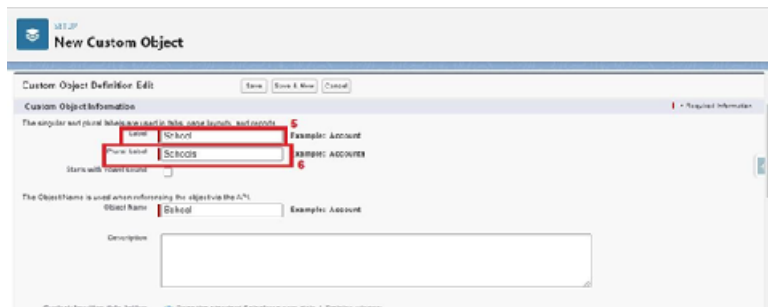
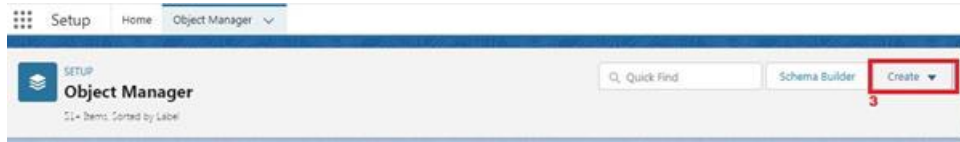
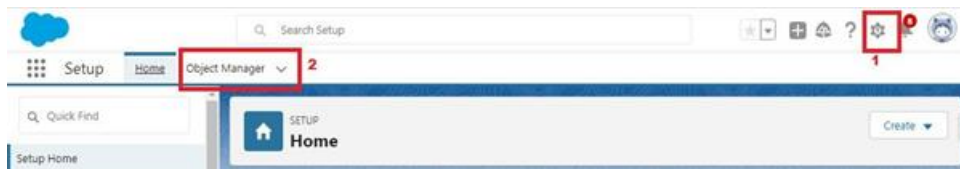


Object

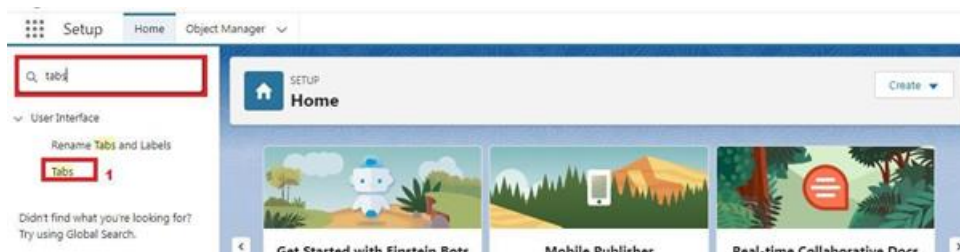
Creation Of School Object Creation Of Objects For School Management

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.



Now create a custom tab. Click the Home tab.



Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: --None-- 3

Tab Style: [Icon] 4

WhatsApp x Smartinternz x School | Salesforce x +

sreevidyanikethandgreec-b8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000002M6i0/edit?address=%2F0115h000002M...

Search Setup

Setup Home Object Manager

School

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
- Triggers

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: School Example: Account

Plural Label: Schools Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: School Example: Account

Description:

Context-Sensitive Help: Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

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: School Name Example: Account Name

Data Type: Text

Optional Features

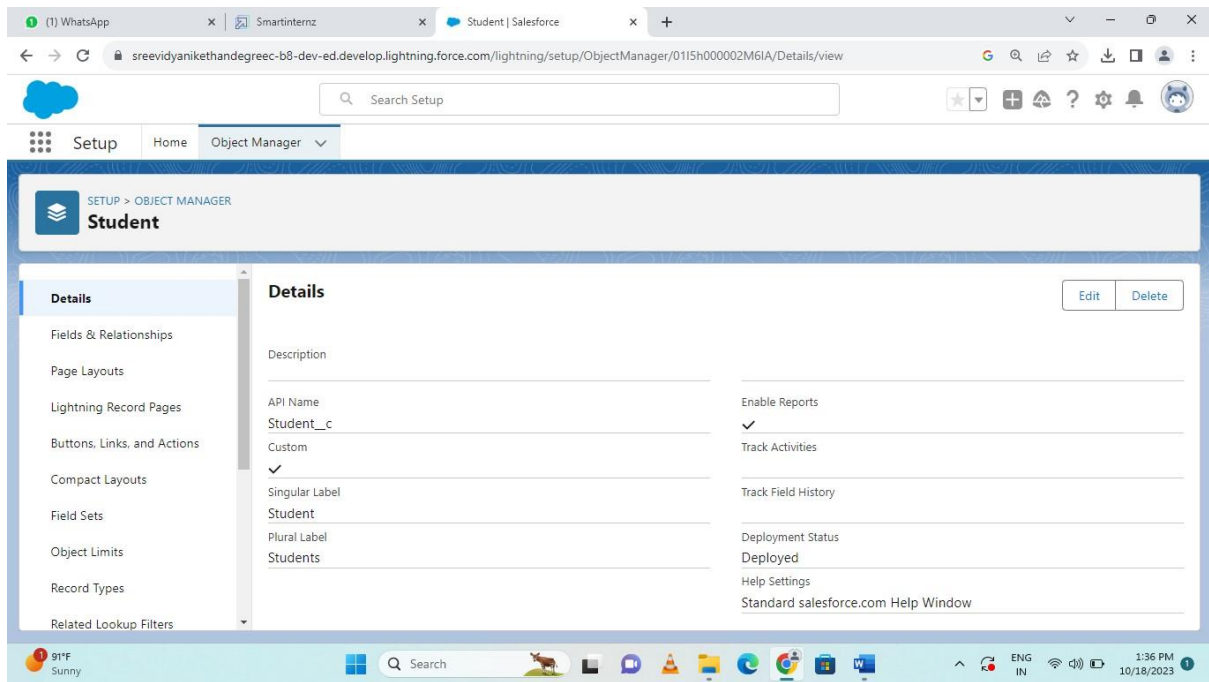
Create Student Object

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.

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.



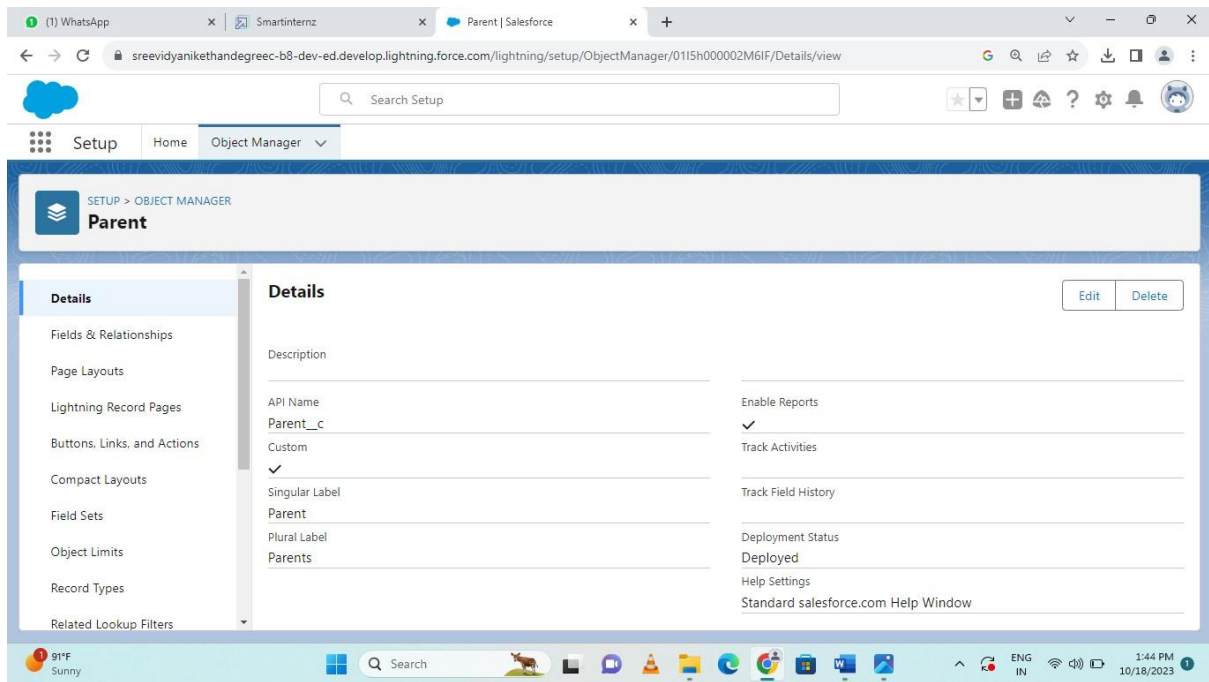
Create Parent Object

Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.
 2. 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: 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.



Lightning App

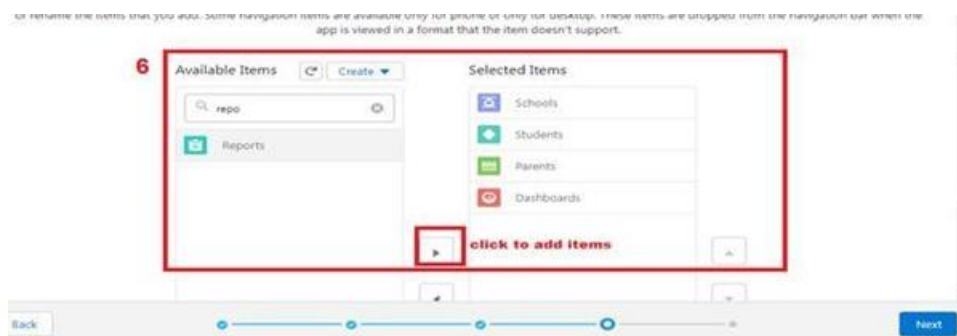
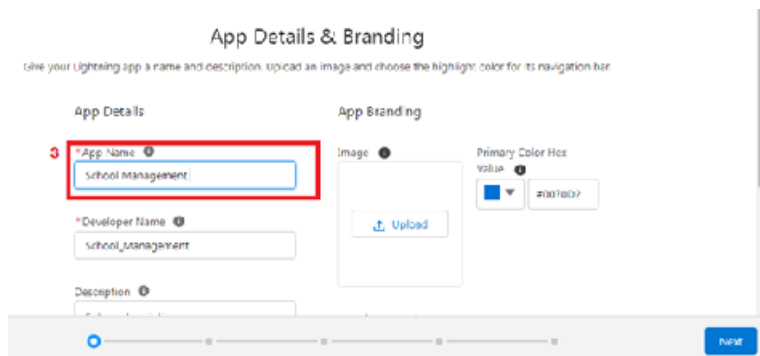
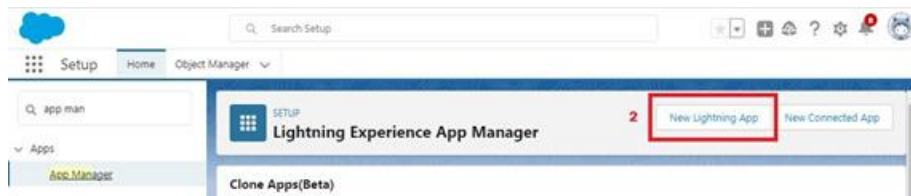
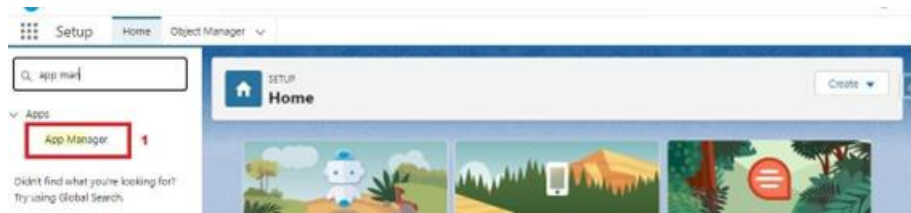
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

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. **Note:** The description, Logo, and Label of standard app cannot be altered.
3. **Custom Apps:** Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.
4. **Note:** Logos for Custom Apps can be changed.

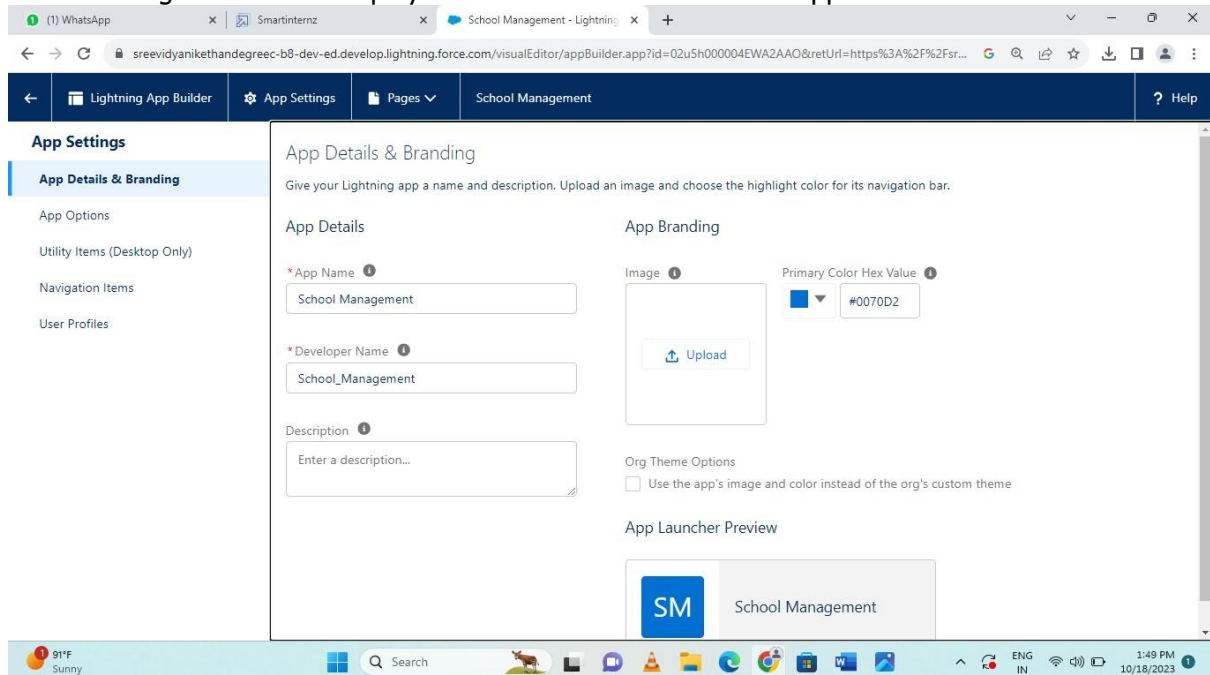
5. Create The School Management App

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.



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

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

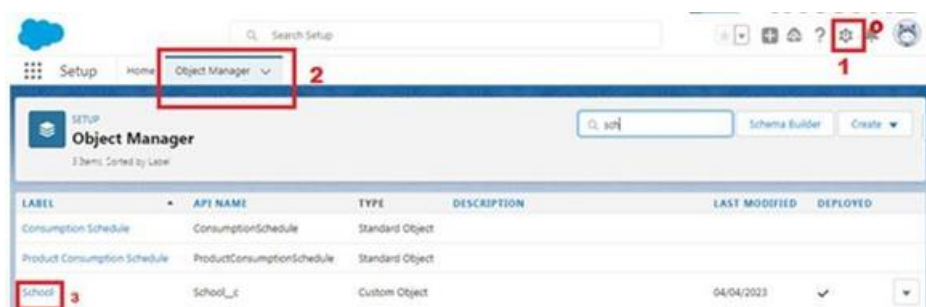


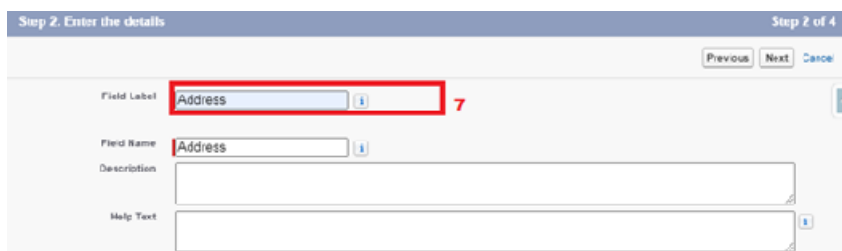
Fields And Relationship

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 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.
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.





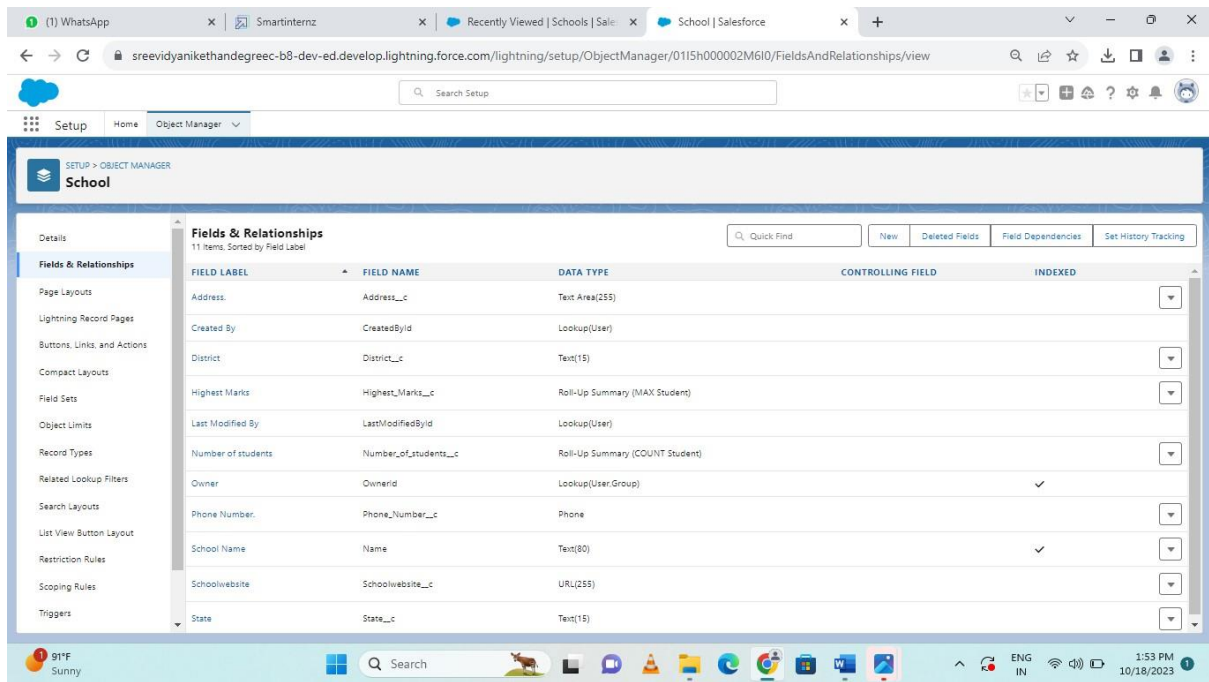
Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it.

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.



Creation Of Fields For The Student Objects

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

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:

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

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:
6. Pass

7. Fail
8. Click Next, Next, then Save & New

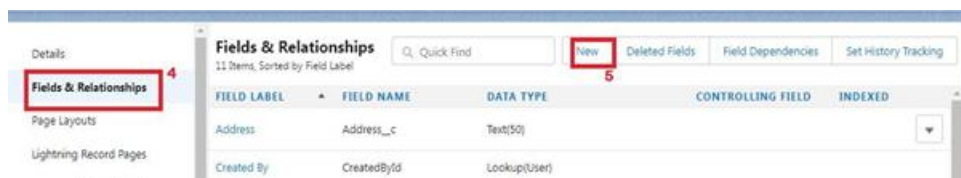
Let's create a Number field:

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

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 and then click Next, Next and save.



Data Type

Select one of the data types below:

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☒ Roll-Up Summary **6**
- ☐ Lookup Relationship
- ☐ Master-Detail Relationship
- ☐ External Lookup Relationship

Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Setup > OBJECT MANAGER > School

Fields & Relationships

Select Object to Summarize

Master Object: School
Summarized Object: Students **9**

Select Roll-Up Type

Roll-Up Type: COUNT **10**

Field to Aggregate: Marks

Filter Criteria

☒ All records should be included in the calculation
☐ Only records meeting certain criteria should be included in the calculation

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.

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships
8 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)		
Email	Email_c	Text(15)		
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)		✓

Creation Of Fields For The Parent Objects

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

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships
6 Items, Sorted by Field Label

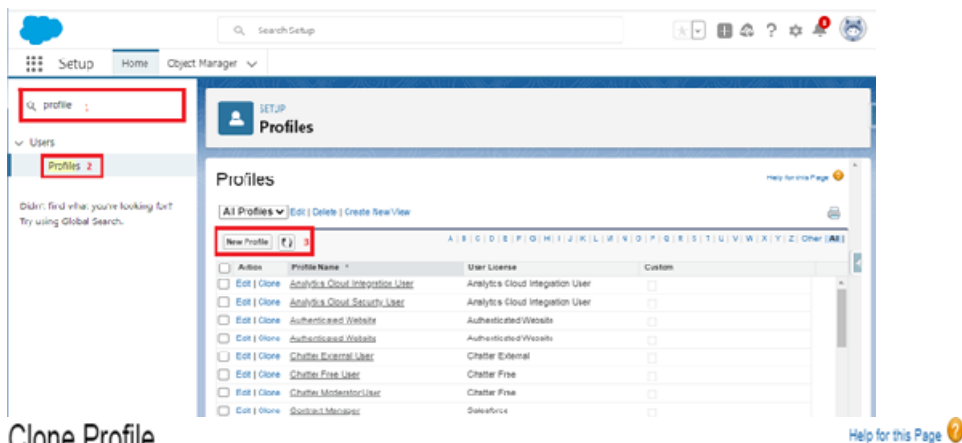
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Parent Address	Parent_Address_c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number_c	Phone		

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 range.

Creation On Profile

- From Setup enter Profiles in the Quick Find box
- Select Profiles.
- Click new, From the list of profiles, find Standard User (profile to clone)
- For Profile Name, enter School Profile
- Click Save.
- While still on the School profile page, then click Edit.
- Scroll down to Custom Object Permissions and Give view all access permissions.



Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. ! = Required Information

Existing Profile: Standard User

User License: Salesforce

Profile Name: School profile 4

Save Cancel 5

Custom Object Permissions 7

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drivers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Schools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Students	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Setup | Home | Object Manager

Search Setup

Profiles

Profiles

1-7 of 7 | 0 Selected

Page 1 of 1

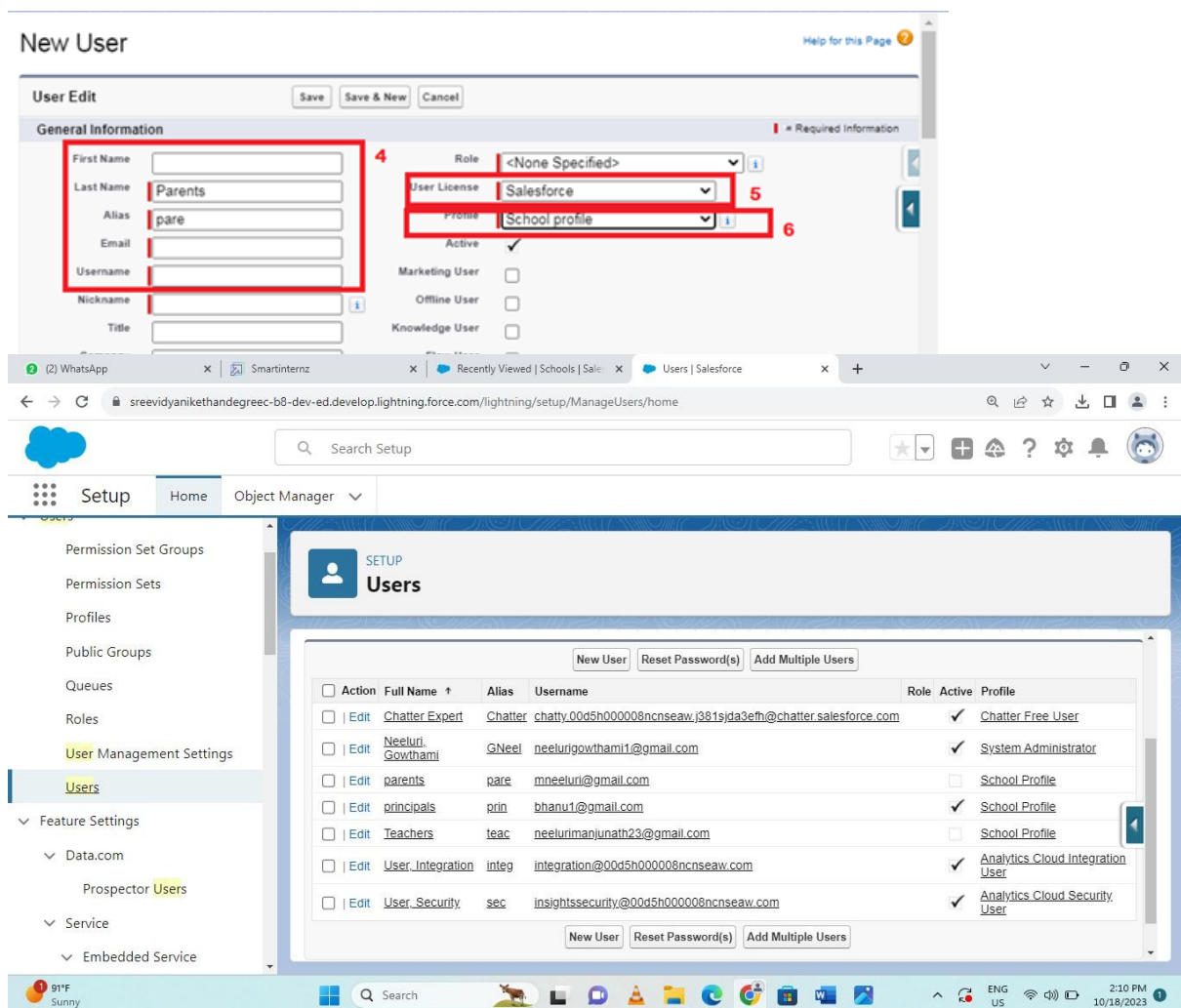
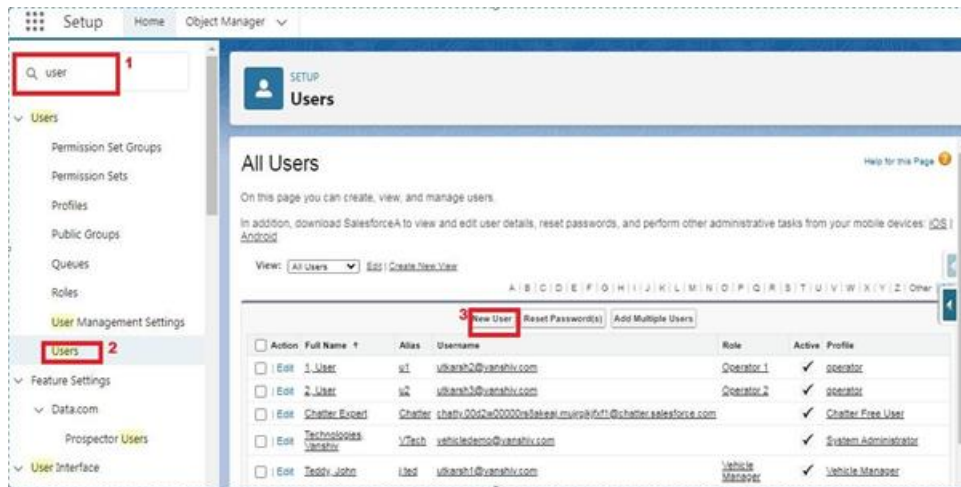
Users

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.
6. 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.
7. Select a profile as a School profile.

8. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
9. Similarly follow the above steps and create 2 users as Teachers and principals.

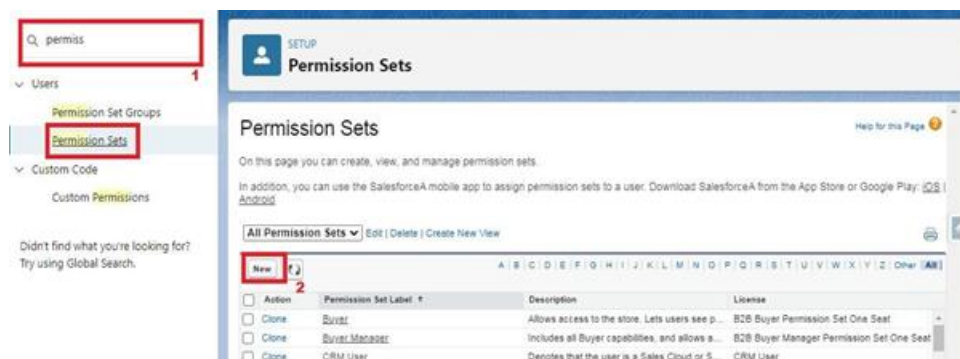


Permission Sets

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.



The screenshot shows the 'Enter permission set information' form. The 'Label' field is highlighted and contains the text 'teacher permission'. The 'API Name' field contains the text 'teacher_permission'. The 'License' dropdown menu is set to '--None--'. The form also includes a 'Session Activation Required' checkbox and a 'Select the type of users who will use this permission set' section with instructions and a 'License' dropdown.

SETUP
Permission Sets

Q Find Settings... Clone Delete Edit Properties **Manage Assignments** 5

Permission Set Overview

Description
License
Session Activation Required ☐
Last Modified By [Venkhy Technologies](#) 04/04/2023, 4:35 pm

API Name teacher_permission
Namespace Prefix
Created By [Venkhy Technologies](#) 04/04/2023, 4:35 pm

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability 4A

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

SETUP
Permission Sets

Available Visible

☐ ☐

Object Permissions

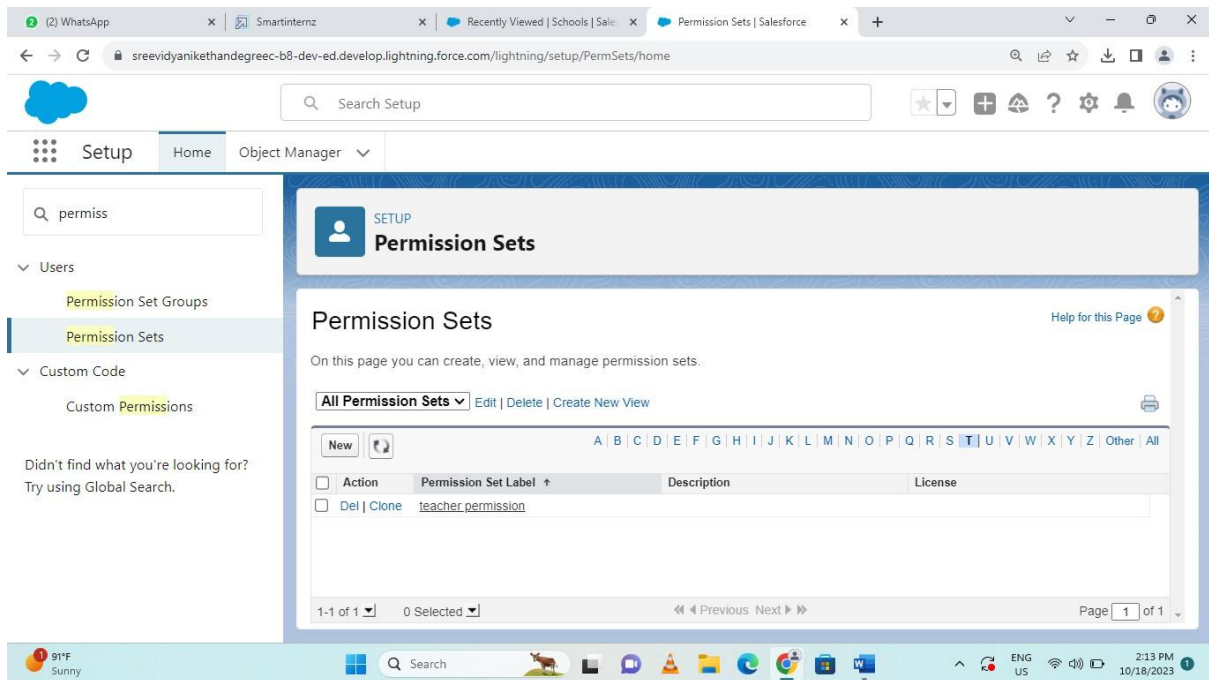
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

4B

SETUP > PERMISSION SET 'TEACHER PERMISSION'
teacher permission

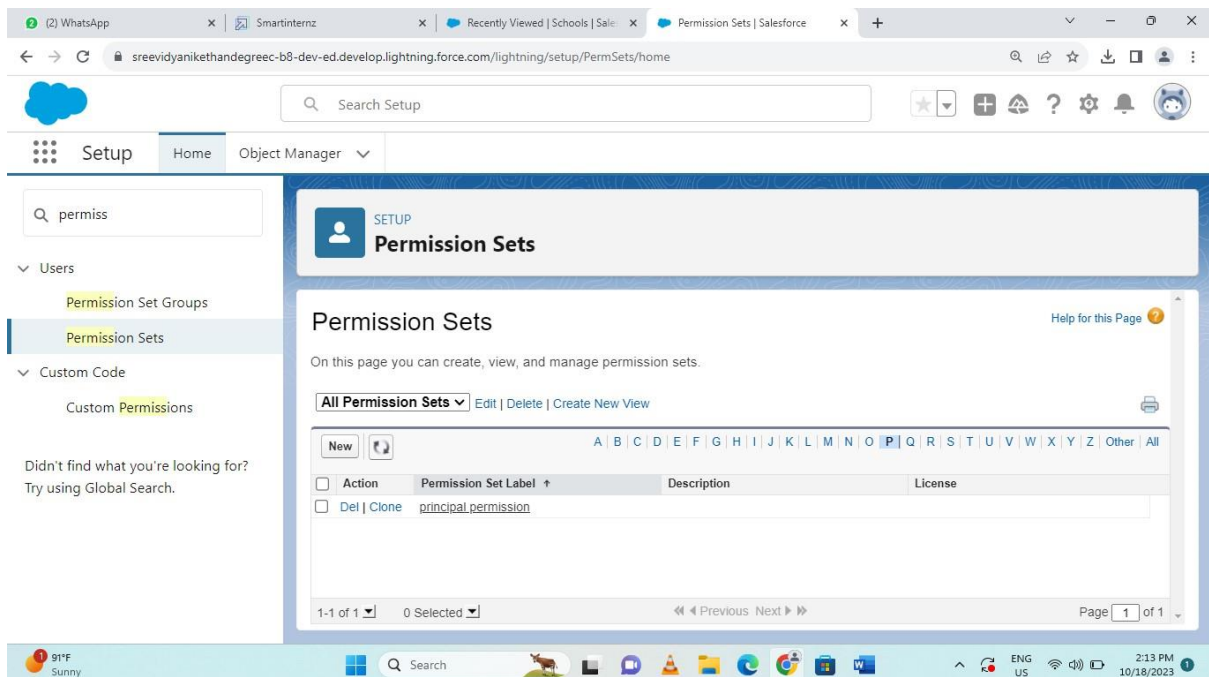
Current Assignments **6** **Add Assignment**

Similarly, follow the above steps for the permission set 2.



Permission Sets 2

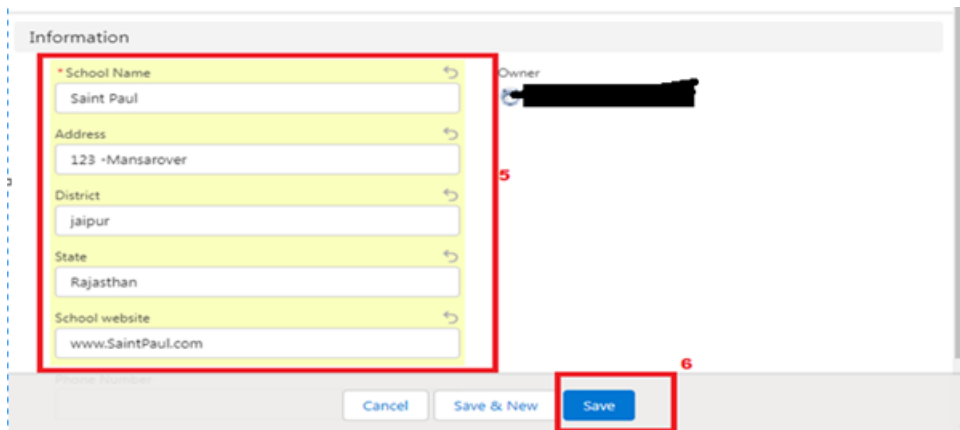
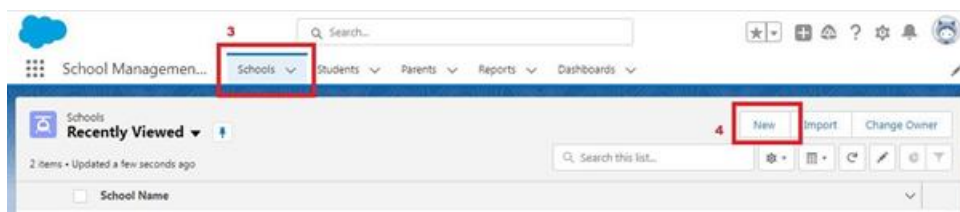
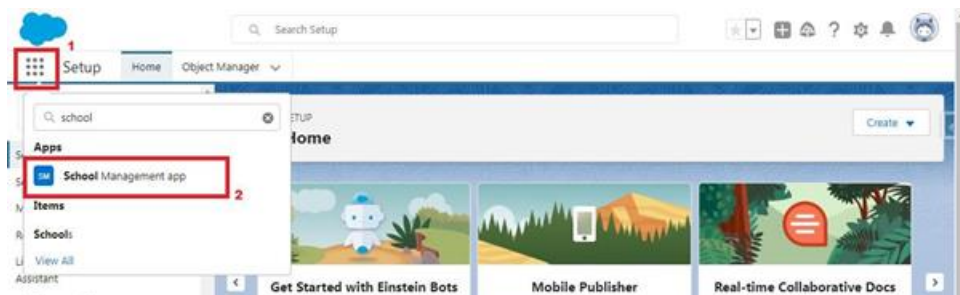
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the all 3 custom objects and assign them to the Principal user.



User Adoption

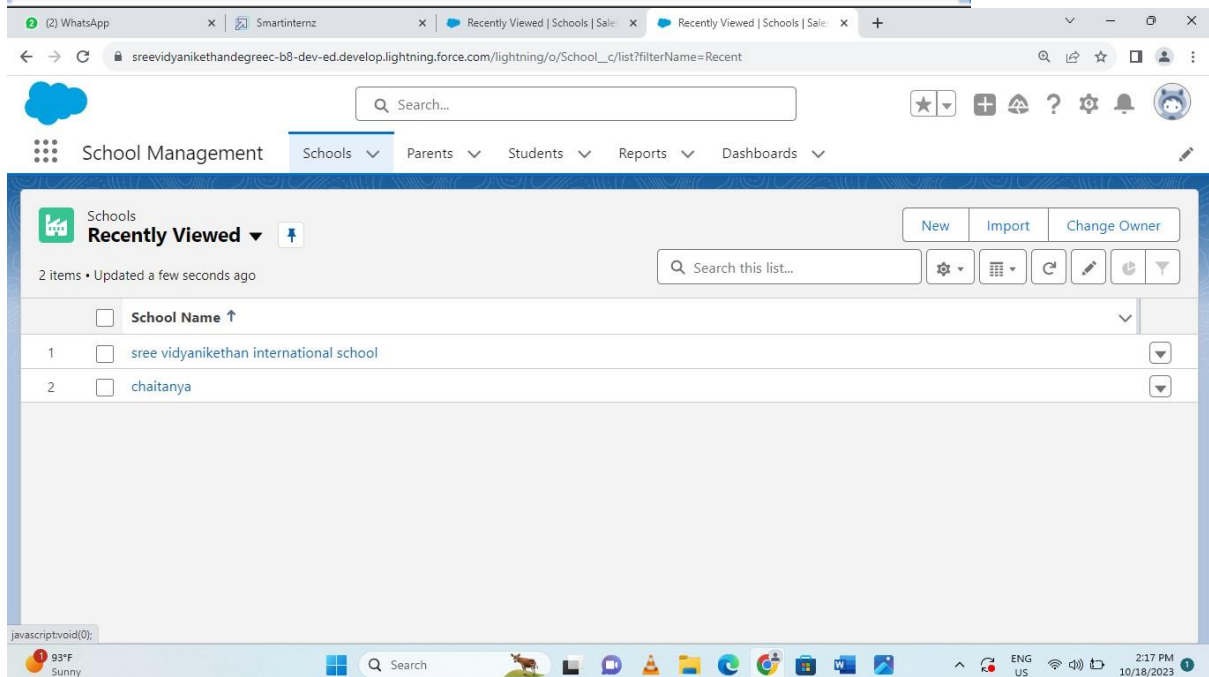
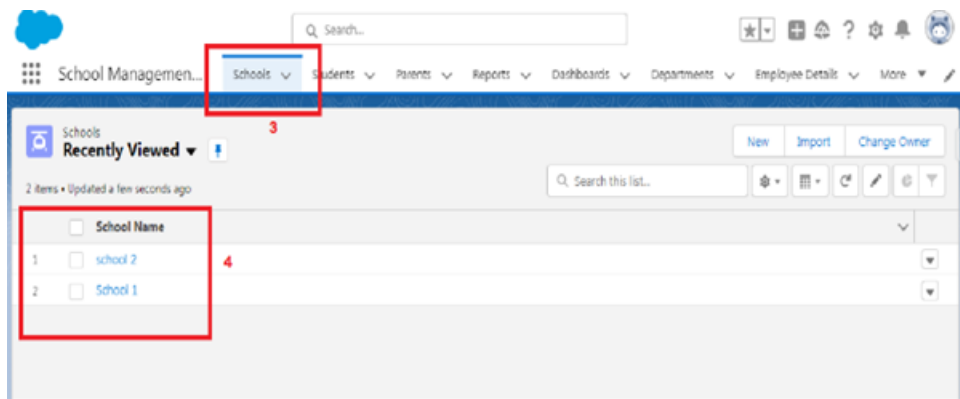
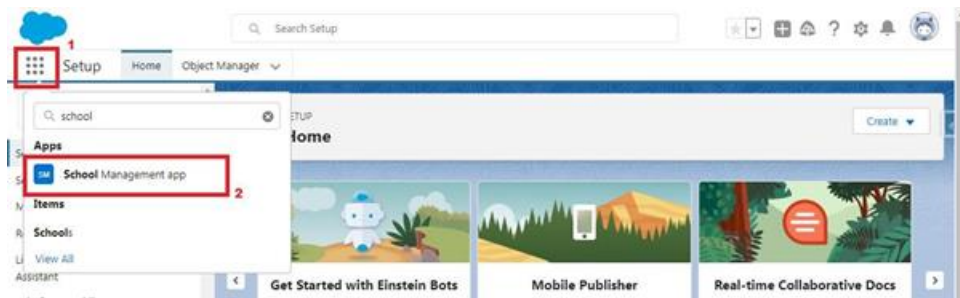
Create Record (School)

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



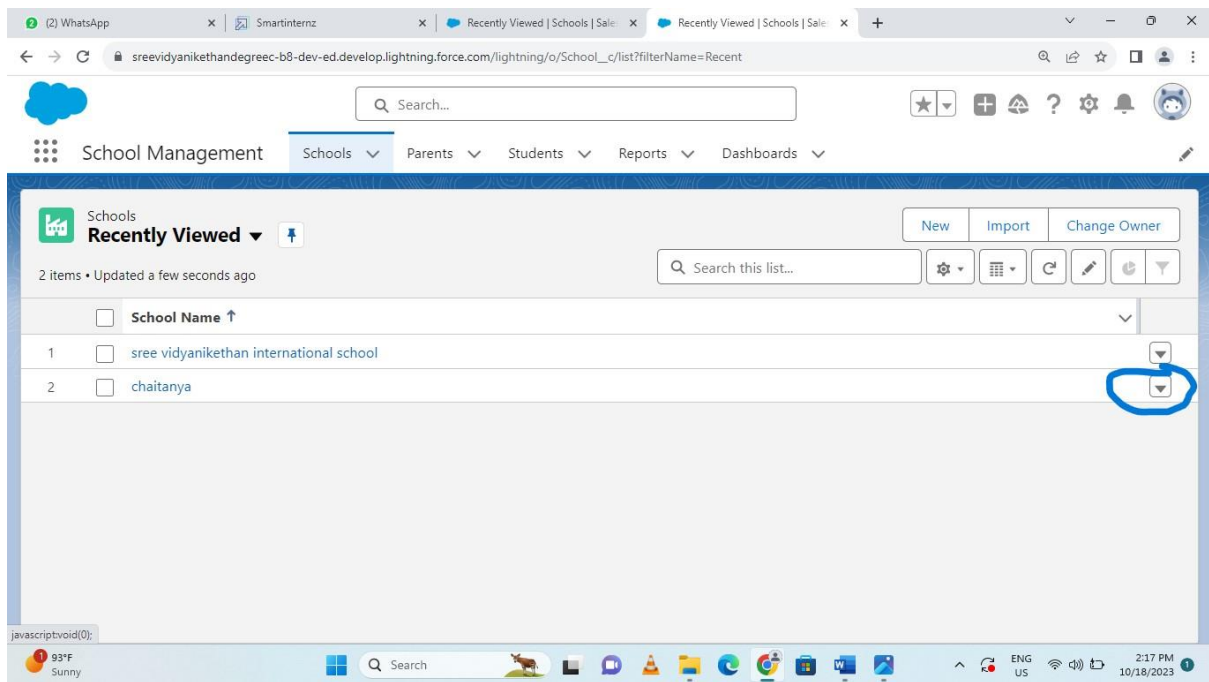
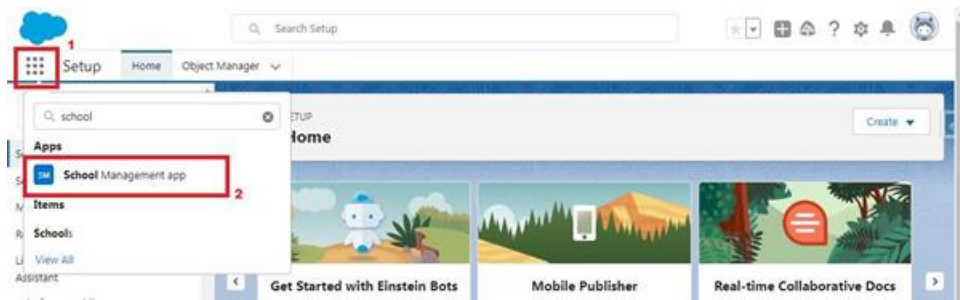
View Record (School)

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.



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.



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:

1.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.

2. Summary Reports:

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

3.Matrix Reports:

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.

4.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.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects.

Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Type:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with "Manage Custom Report Types" permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. 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.

2. 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.

3. 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.

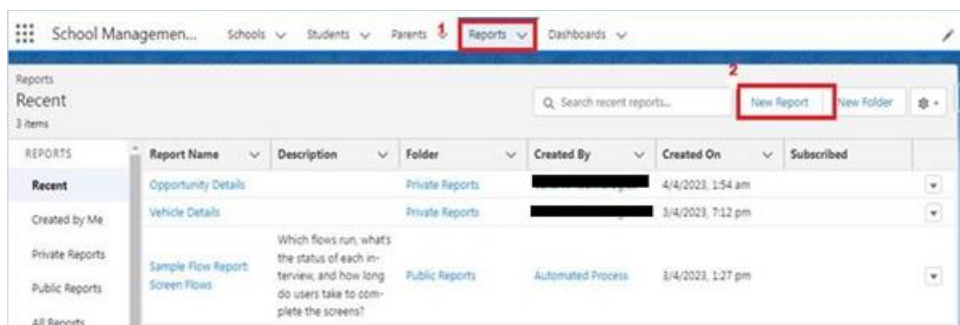
From this milestone we are going to import the data and create the reports and dashboards for data visualization in the application.

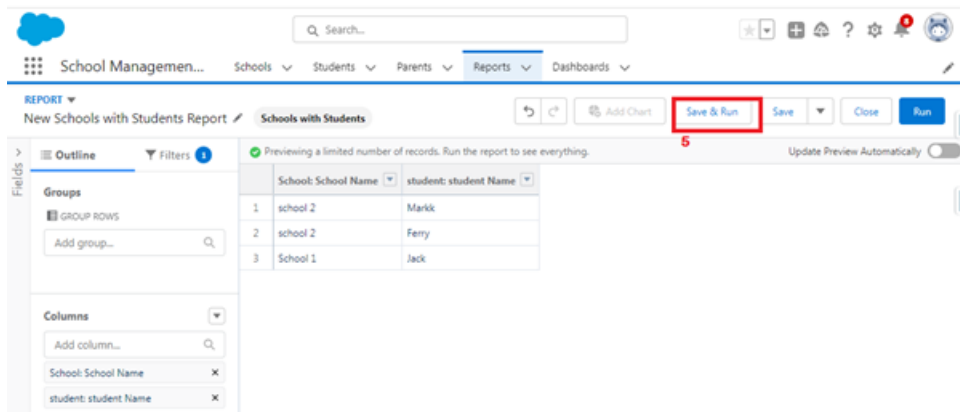
Create Report

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

- NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).





Save Report

Report Name

Schools with Students Report

Report Unique Name

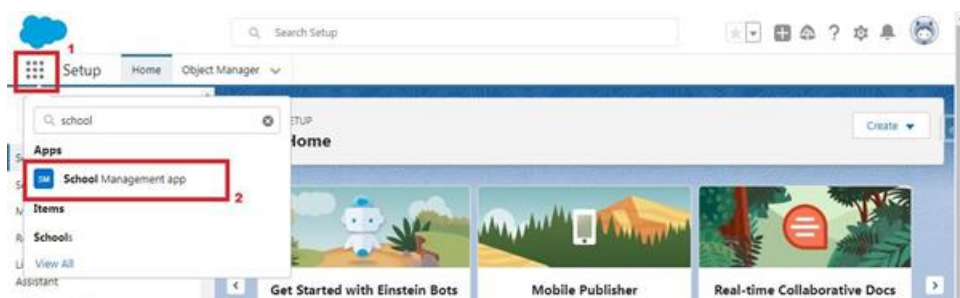
Schools_with_Students_Report_Klh

Report Description

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



The top screenshot shows the Salesforce Reports interface. The left sidebar contains navigation links: School Management, Schools, Parents, Students, Reports (selected), and Dashboards. The main content area displays 'Recent Reports' with a search bar and buttons for 'New Report' and 'New Folder'. A table lists recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	24/9/2023, 10:19 am	
Created by Me	Schools with Students Report		Private Reports	Gowthami Neeluri	14/10/2023, 3:04 pm	

The bottom screenshot shows the 'Schools with Students Report' details. It includes a summary section with 'Total Records: 3' and 'Total Highest Marks: 152'. Below this is a table of records:

	District	Address	School ID	School School Name	Student: Student Name	Highest Marks
1	chittoor	A.Rangampet,Tirupati	a005h00000wM2zC	sree vidyanikethan international school	Gowthami	87
2	chittoor	A.Rangampet,Tirupati	a005h00000wM2zC	sree vidyanikethan international school	chandu	87
3	Anantapur	kerala	a005h00000wMHJj	chaitanya	RAMYA	65
4						152

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.

Write A Trigger

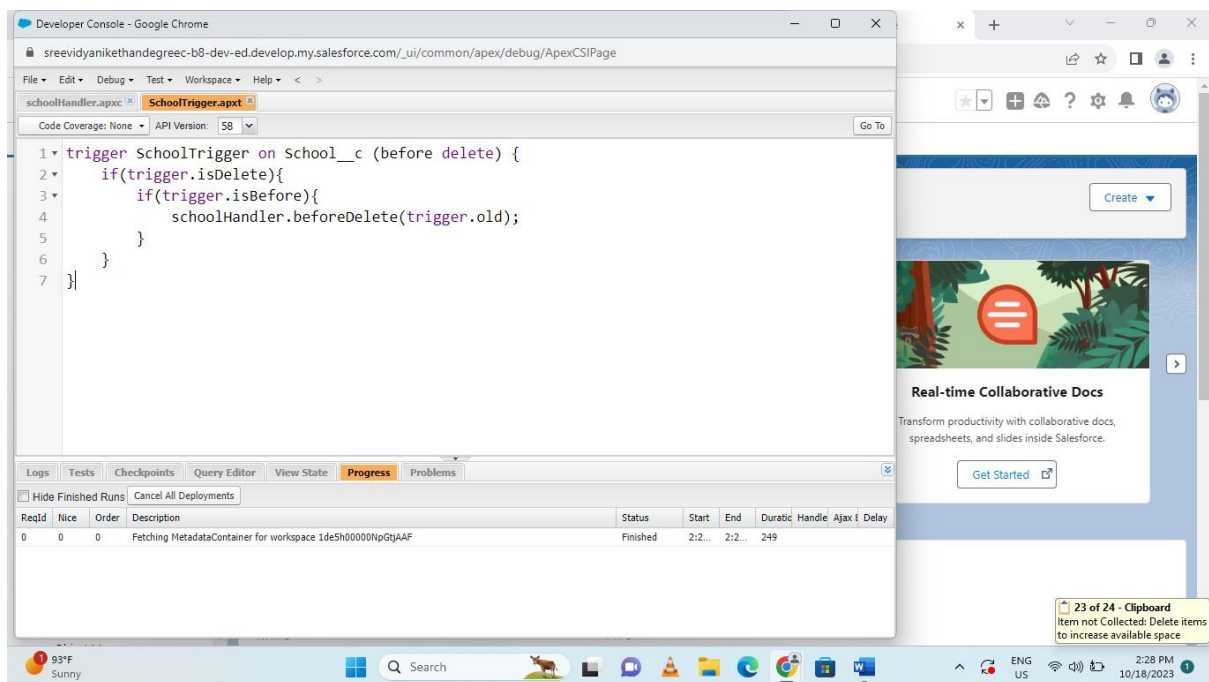
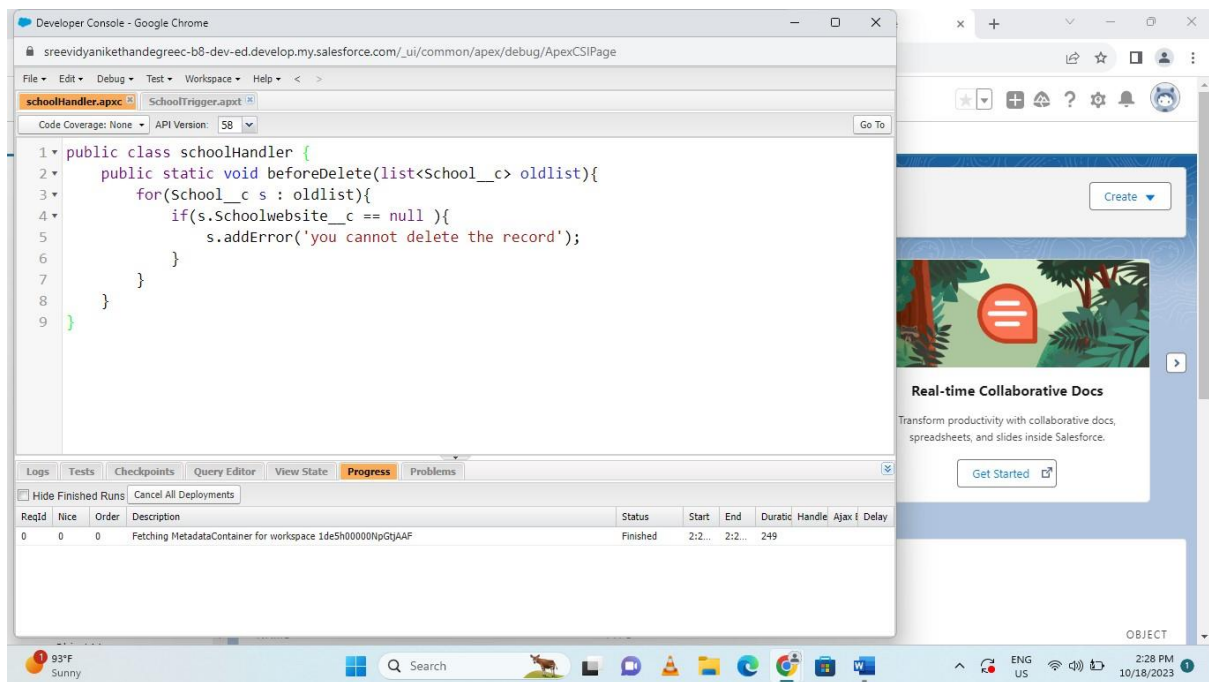
write a trigger whenever the school website is null you should be unable to delete the record.

Go to the gear icon and select the developer console.
From the menu bar click on file and select Apex class.
Now give the class name as schoolHandler
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 ){  
                s.addError('you cannot delete the record');  
            }  
        }  
    }  
}
```

From the menu bar click on file and select Apex trigger.
Now give the trigger name as Internalmarks
Now write the below code

```
trigger SchoolTrigger on School__c (before delete) {  
    if(trigger.isDelete){  
        if(trigger.isBefore){  
            schoolHandler.beforeDelete(trigger.old);  
        }  
    }  
}
```



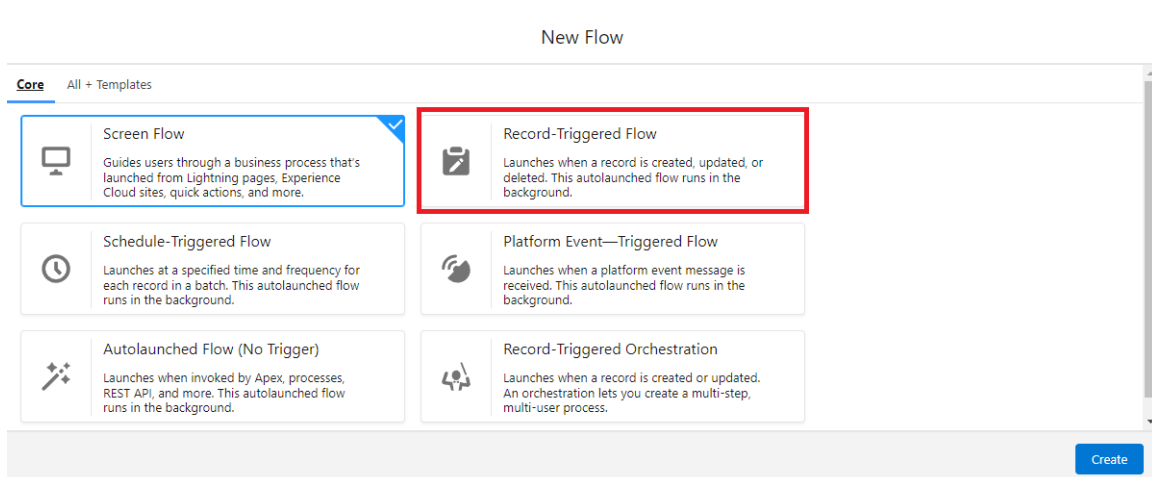
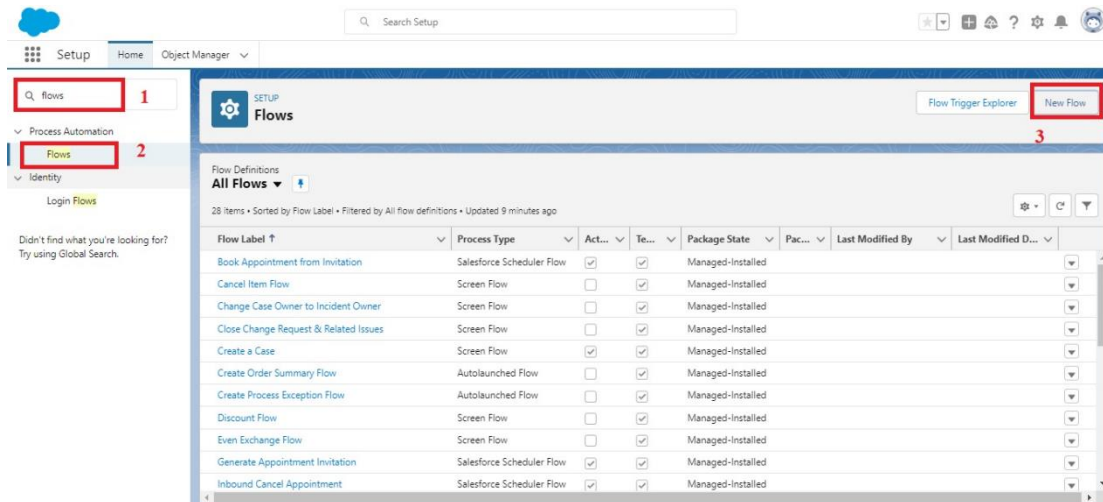
Flows

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.

Create Flow

Create a record triggered flow whenever a student record is created it must send the email to the student about their welcome.

Click on Gear icon and select setup
In Quick find Box enter flow and select the flows
Click on New flow and Select Record triggered Flows.



In the search bar type student and click done.

Configure Start

Select Object

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

*Object

Search objects... Q

A value is required.

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

Cancel
Done

Select (+)

type action and type email as follows.

New Action

Filter By

Category ▼

All

Users

Commerce

Group

Work Plans

Work Steps


Notifications

Sales leads

Action

email

Send Email
emailSimple-emailSimple



Lights, camera, action!

Select an action to configure.

Cancel
Done

Enter the following details

Label:Student Record Creation

Api Name:Student_Record_Creation(Auto-pupulated)

Body: Hi {\$Record.Name} , we are happy to inform you that you have joined in our {\$Record.school__r.Name}.

Subject: Record Creation

Recipient email Address:{\$Record.Email__c}

New Action

Filter By

Category ▼

- All
- Users
- Commerce
- Group
- Work Plans
- Work Steps
- Notifications
- Sales leads

Action

Send Email

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

* Label

* API Name

Description

Set Input Values

A_a * Body

Cancel
Done

New Action

Notifications

Sales leads

Appointments

Task

Price books

[+ Create HTTP Callout \(Beta\)](#)

Set Input Values

A_a * Body

A_a Subject

A_a Recipient Email Addresses (collection)

☐ Don't Include

A_a Recipient Email Addresses (comma-separated)

A_a Rich-Text-Formatted Body

☐ Include

Cancel
Done

click on done and Click on save
 Flow label:Student flow
 Flow API Name:Student_flow
 and then click Activate.

Save the flow

* Flow Label

Flow API Name

Description

[Show Advanced](#)

Cancel

Save

(2) WhatsApp x Smartinternz x Recently Viewed | Sci x Schools with Studen x Flows | Salesforce x Home | Salesforce x + v - o x

sreevidyanikethandegrec-b8-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home



Search Setup



Setup Home Object Manager v

Q FLOWS

Process Automation

Flows

Identity

Login Flows

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



SETUP

Flows

[Flow Trigger Explorer](#)

[New Flow](#)

Flow Definitions

All Flows v

35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago



Flow Label ↑	Process Type	A...	Te...	Package State	P...	Last Modifi...	Last Modified ...
Reset Password	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Reship Order Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Return Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
RMA Create Credit M...	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
RMA Return Items	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Send Appointment In...	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Student flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Gowthami Neeluri	17/10/2023, 1:35 pm	
Verify Identity	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			



93°F
Sunny

Search



ENG
US



2:36 PM
10/18/2023