

## PROJECT



# CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

***PRESENTED BY :***

**Team : *NM2023TMID0461***

NAME	NMID	TRAILHEAD URL
RIDHY MARIYAM JOY (Team lead)	06BD10D5A8DB2 6482314500710E0 6BD8	<a href="https://www.salesforce.com/trailblazer/ridhymariyamjoy">https://www.salesforce.com/trailblazer/ridhymariyamjoy</a>
DALIA MARIAM JAMES (Team member1)	627CA7B2B4E43718 9FE471F4B6C30AB 6	<a href="https://www.salesforce.com/trailblazer/daliyamariamjames">https://www.salesforce.com/trailblazer/daliyamariamjames</a>
HARICHANDANA.S (Team member2)	495085AE4AF02 A08E5E4D06E50	<a href="https://www.salesforce.com/trailblazer/harichand">https://www.salesforce.com/trailblazer/harichand</a>



	E2095A	anas
AVANI ANIL (Team member3)	783901AC6AA34 838C2A4F9FED0 277AF4	<a href="https://www.salesforce.com/trailblazer/avanianil">https://www.salesforce.com/trailblazer/avanianil</a>

# INTRODUCTION

## **Overview:**

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

## **Purpose:**

1. The project aims to develop an application for school management that automates administrative tasks, enhancing efficiency and reducing manual effort.
2. It centralizes student, teacher, and staff information, ensuring better data management and accuracy in records.
3. The application fosters seamless communication between teachers, parents, students, and administrators through announcements and notifications.
4. It simplifies attendance tracking, academic performance monitoring, and examination/result management for teachers and administrators.
5. The application provides valuable reports and analytics to aid data-driven decision-making for improved school performance and resource management.

# LITERATURE SURVEY

## **Existing Problem:**

1. The existing problem with the creation of an application for school management is the lack of a unified and efficient system to handle various administrative tasks.
2. Many schools still rely on manual processes, spreadsheets, and disparate software, leading to inefficiencies, data inconsistencies, and communication gaps.
3. This fragmented approach often results in difficulties in tracking attendance, managing student information, generating accurate reports, and ensuring smooth communication among teachers, parents, and administrators.
4. The absence of a comprehensive and user-friendly school management application hampers the overall efficiency and effectiveness of school operations.

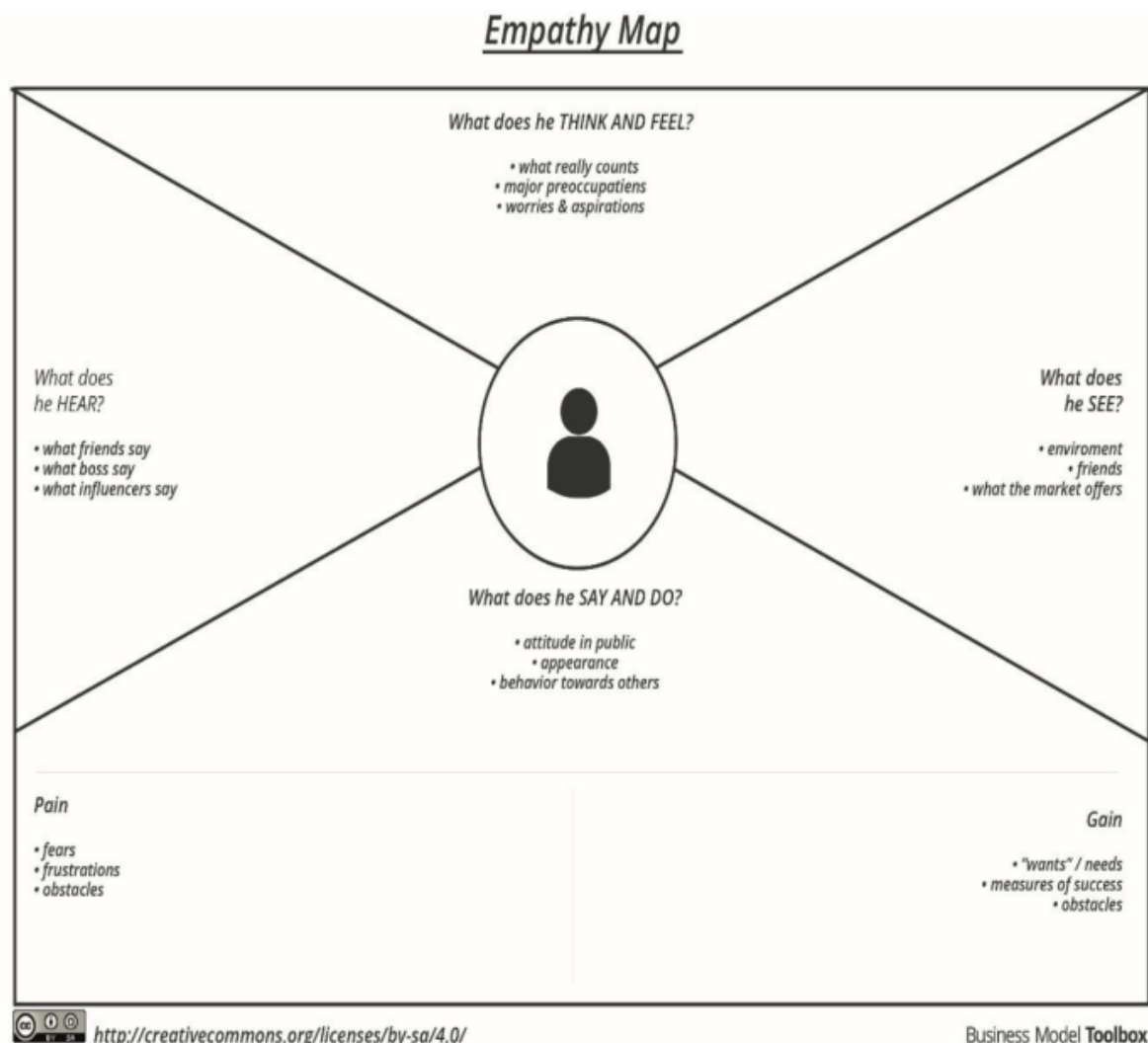
## **Proposed Solution:**

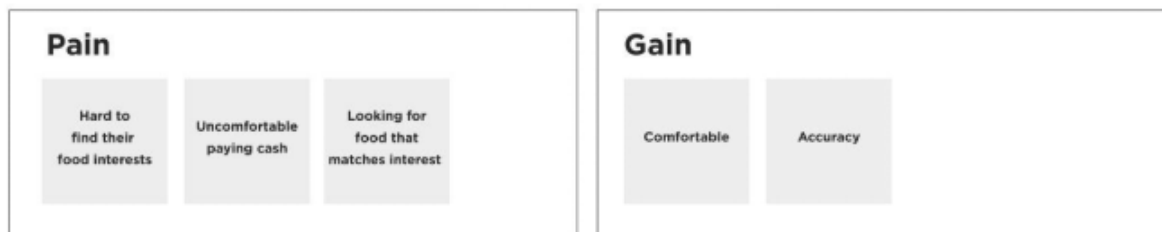
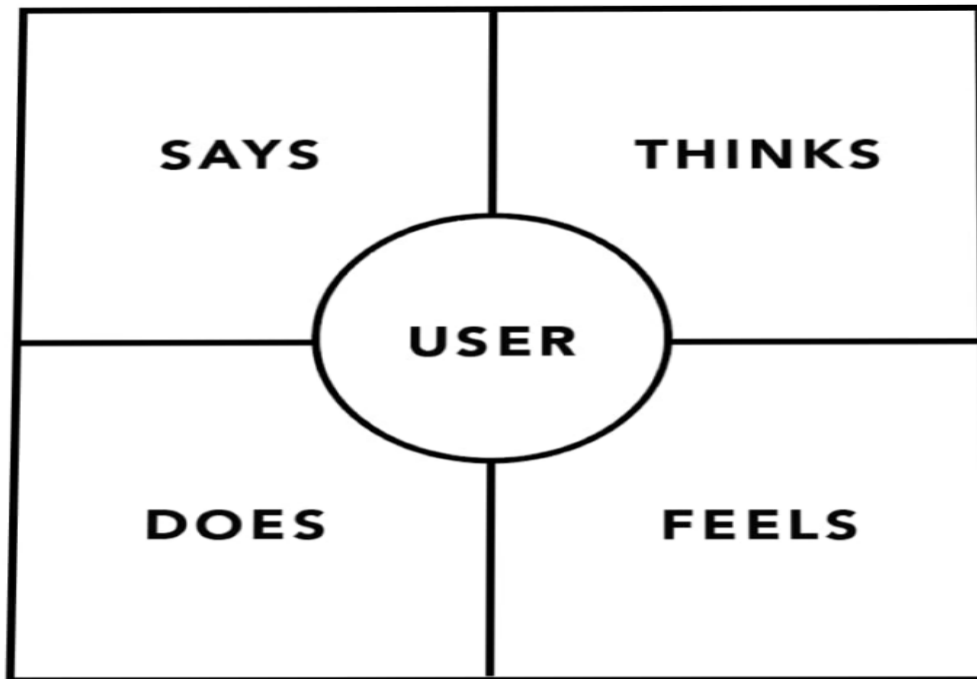
1. The proposed solution to suggest is to develop a comprehensive cloud-based school management application with an intuitive interface, automation features, and seamless integration.
2. It will facilitate efficient attendance tracking, academic management, and communication among teachers, parents, students, and administrators.
3. The application will provide valuable insights through analytics and reports, ensuring data-driven decision-making.
4. With robust security measures and customization options, schools can enhance overall efficiency and productivity, creating a more streamlined and effective learning environment.

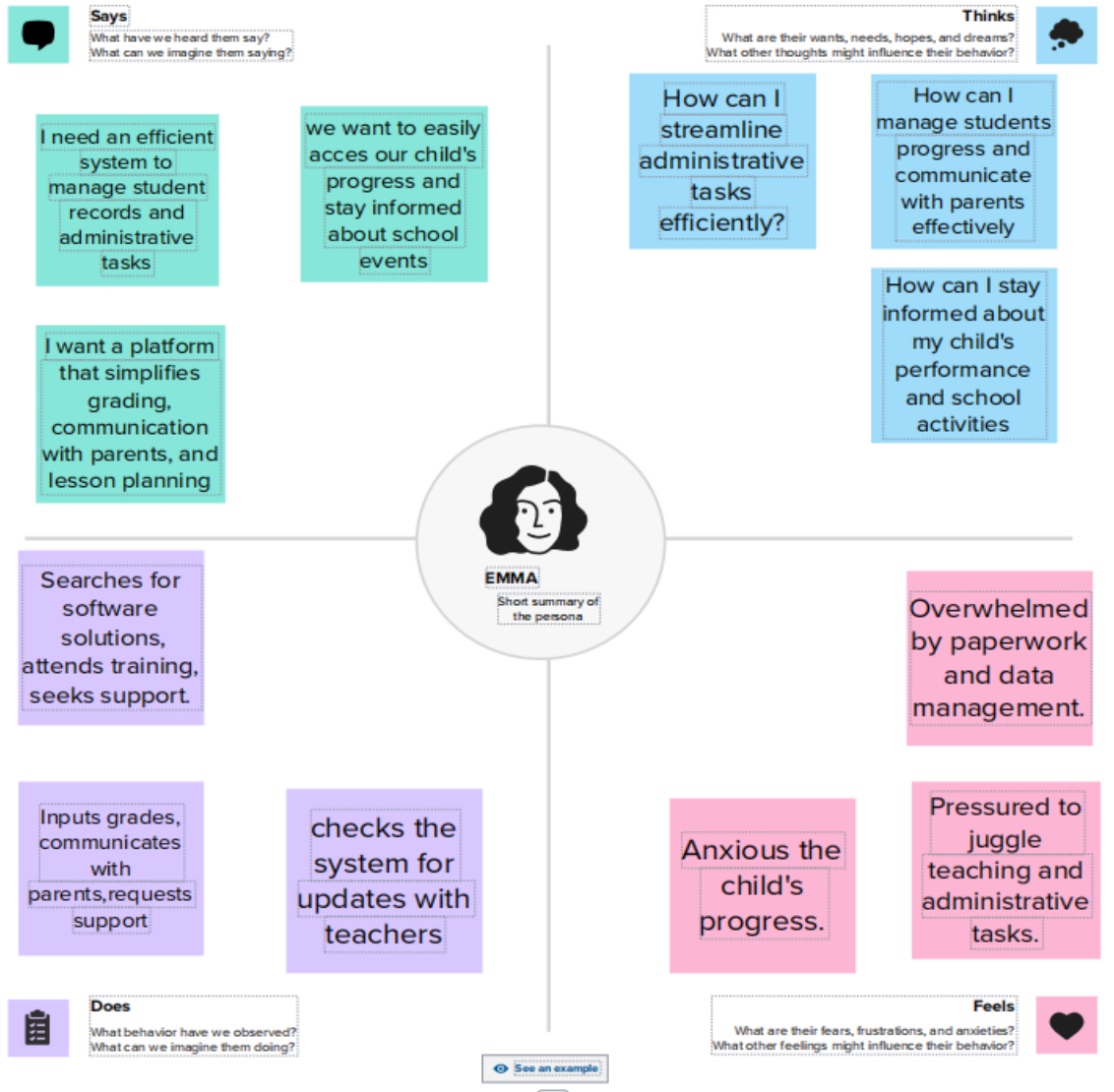
## Problem Definitions and Design Thinking:

### Empathy Map:

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes. It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.

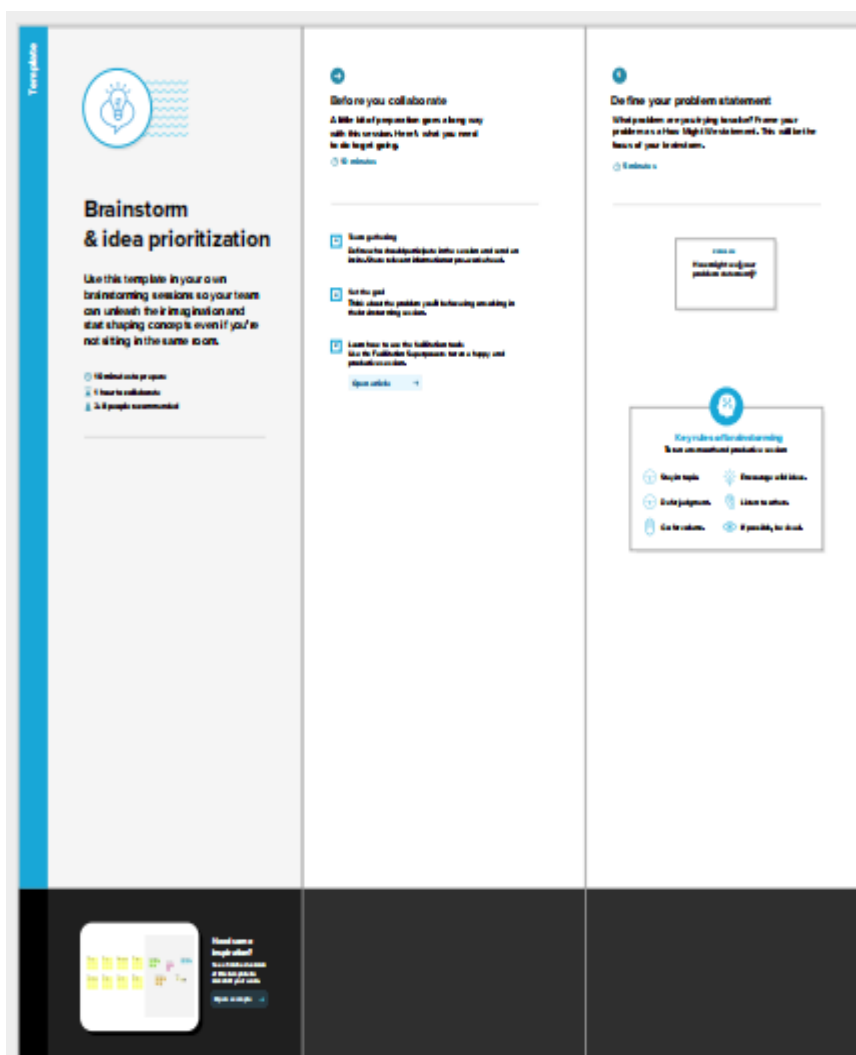






# IDEATION AND BRAINSTORMING

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

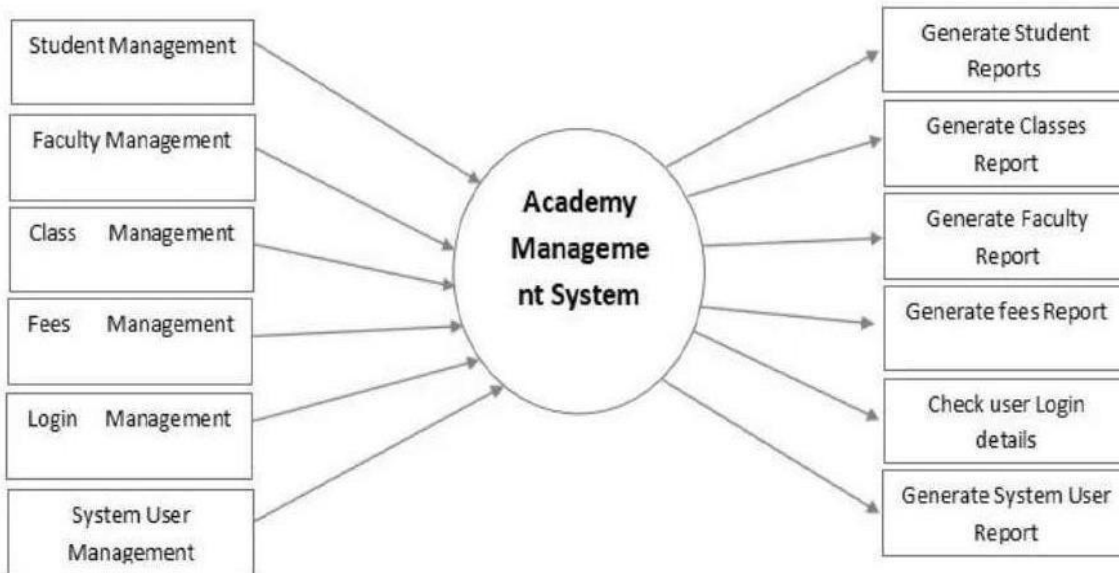






# THEORETICAL ANALYSIS

Block Diagram:



## Hardware and Software Designing:

In the Salesforce platform, the School Management Application would be developed as a cloud-based software solution, which means most of the hardware requirements would be taken care of by Salesforce itself. However, there are still some essential hardware and general requirements to consider:

### Hardware Requirements:

1. Client Devices: Users will need computers, laptops, or mobile devices with internet connectivity to access the application.
2. Internet Connection: A stable and reliable internet connection is necessary for seamless access to the Salesforce platform and the application.

### Salesforce Platform Requirements:

1. Salesforce Account: You will need a Salesforce account to develop and host the application.
2. Edition: The edition of Salesforce used will depend on the requirements and complexity of the application. Options include

Salesforce Essentials, Professional, Enterprise, or Unlimited editions.

3. Licenses: Sufficient user licenses must be available for administrators, teachers, students, and parents, as per the number of users who will access the application.

### **Salesforce Limits and Allocations:**

1. API Limits: The application's integration with external systems may require consideration of API limits imposed by Salesforce.
2. Data Storage: Depending on the volume of data, you may need to ensure sufficient data storage is available in your Salesforce org.
3. Custom Objects and Fields: If the application involves custom objects and fields, ensure that they fit within Salesforce's object and field limits.

### **Security and Compliance:**

1. Data Privacy: Implement proper security measures to ensure data privacy and comply with relevant regulations, such as GDPR (General Data Protection Regulation).
2. User Authentication: Enable secure login mechanisms like multi-factor authentication to protect user accounts.

### **Customization and Development:**

1. Development Environment: Use a suitable development environment to build custom Visualforce pages, Lightning components, and Apex classes to tailor the application to your specific needs.
2. Integration Requirements: Determine the need for integrating with other systems and ensure compatibility and security.

### **User Training and Support:**

1. User Training: Provide training and documentation to users to ensure they understand how to use the application effectively.

2. Technical Support: Have a support mechanism in place to address any issues or queries that users may encounter.

## PROCESS AND RESULTS

### 1.Creating Developer Org:

Creating a developer org in salesforce

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

Developer Edition Sign up | 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\* Dalia Mariam Last Name\* James

Email\* daliyamariyam121@gmail.com

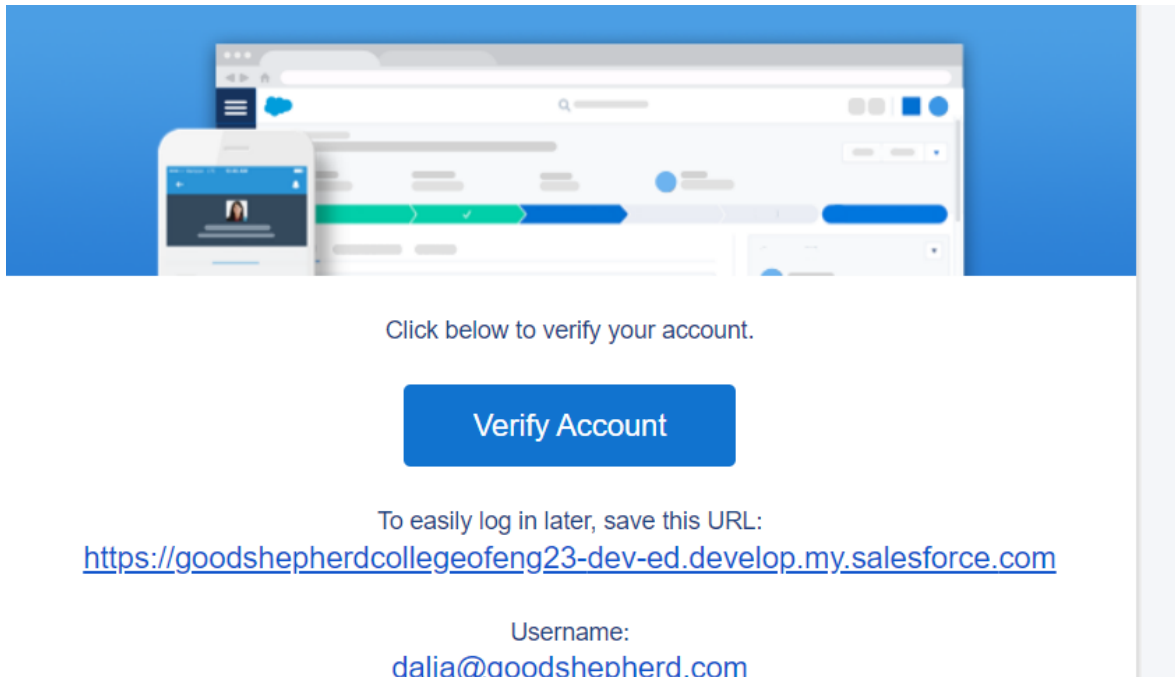
Role\* Developer

Company\* Good Shepherd College of Engineering and Technology

Country/Region\* India

### 2.AccountActivation:

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



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

Developer Trailmix x Welcome to Sales! x Change Your Pass... x - Student x developer edition x Successful Develo... x +

goodshepherdcollegeofeng-a2-dev-ed.develop.my.salesforce.com/\_ui/system/security/ChangePassword?retURL=%2Fflightning%2Fsetup%2FSetupOneHome%2Fhome&fromF...

**salesforce**

### Change Your Password

Enter a new password for **harichandana@good.com**.  
Make sure to include at least:

- ☐ 8 characters
- ☐ 1 letter
- ☐ 1 number

\* New Password

\* Confirm New Password

Security Question

▼ In what city were you born?

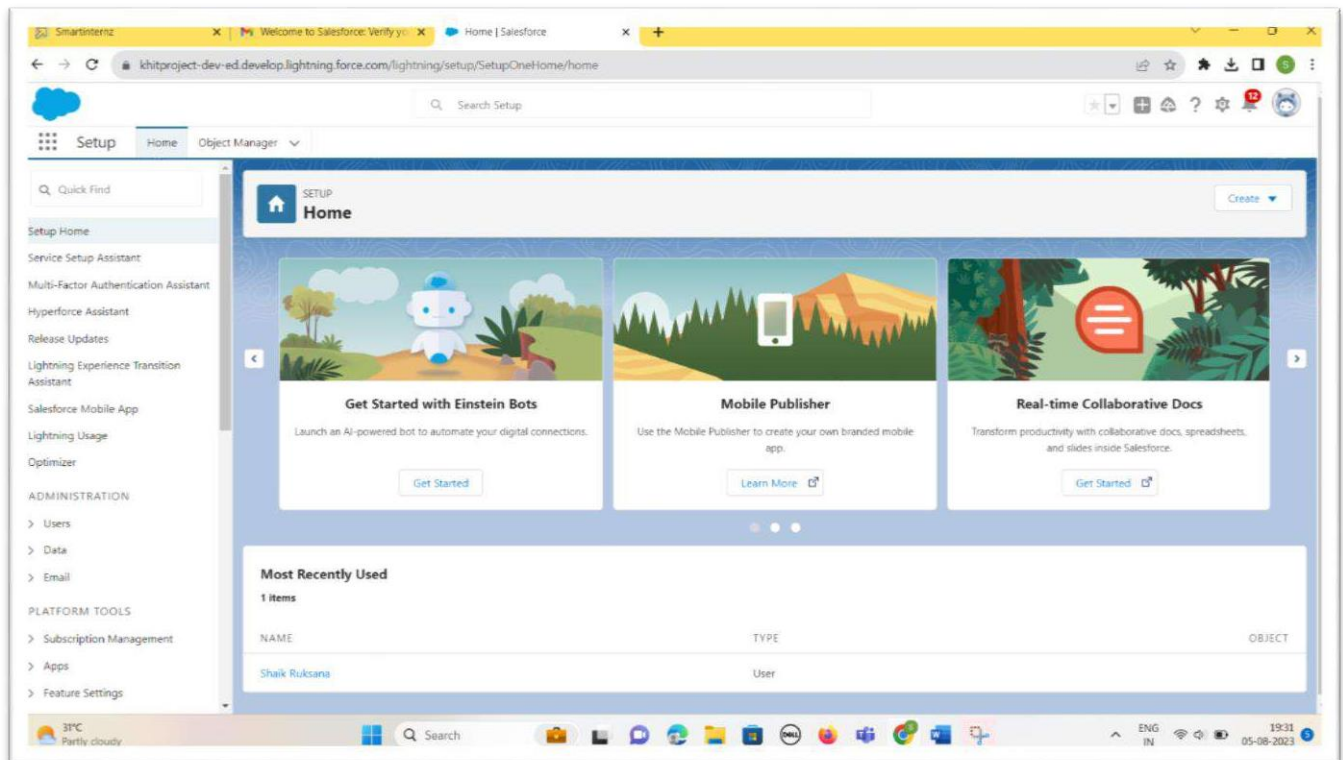
\* Answer

[Change Password](#)

Password was last changed on 30/10/2023, 9:08 pm.

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After setting the password, the page redirects to the Salesforce Setup Page where we are going to do each and every step regarding our project. It Looks like this.



Here's a brief introduction to the key components of the Salesforce setup page:

1. Home: The central hub for Salesforce administrators to access and manage all setup options.
2. Object Manager: Customize and manage standard and custom objects, defining data structure and relationships.
3. App Launcher: Easily switch between Salesforce apps and custom-built applications.

### 3.OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

- ❖ Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- ❖ Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data

## Coming to our project we have to create three custom objects:

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

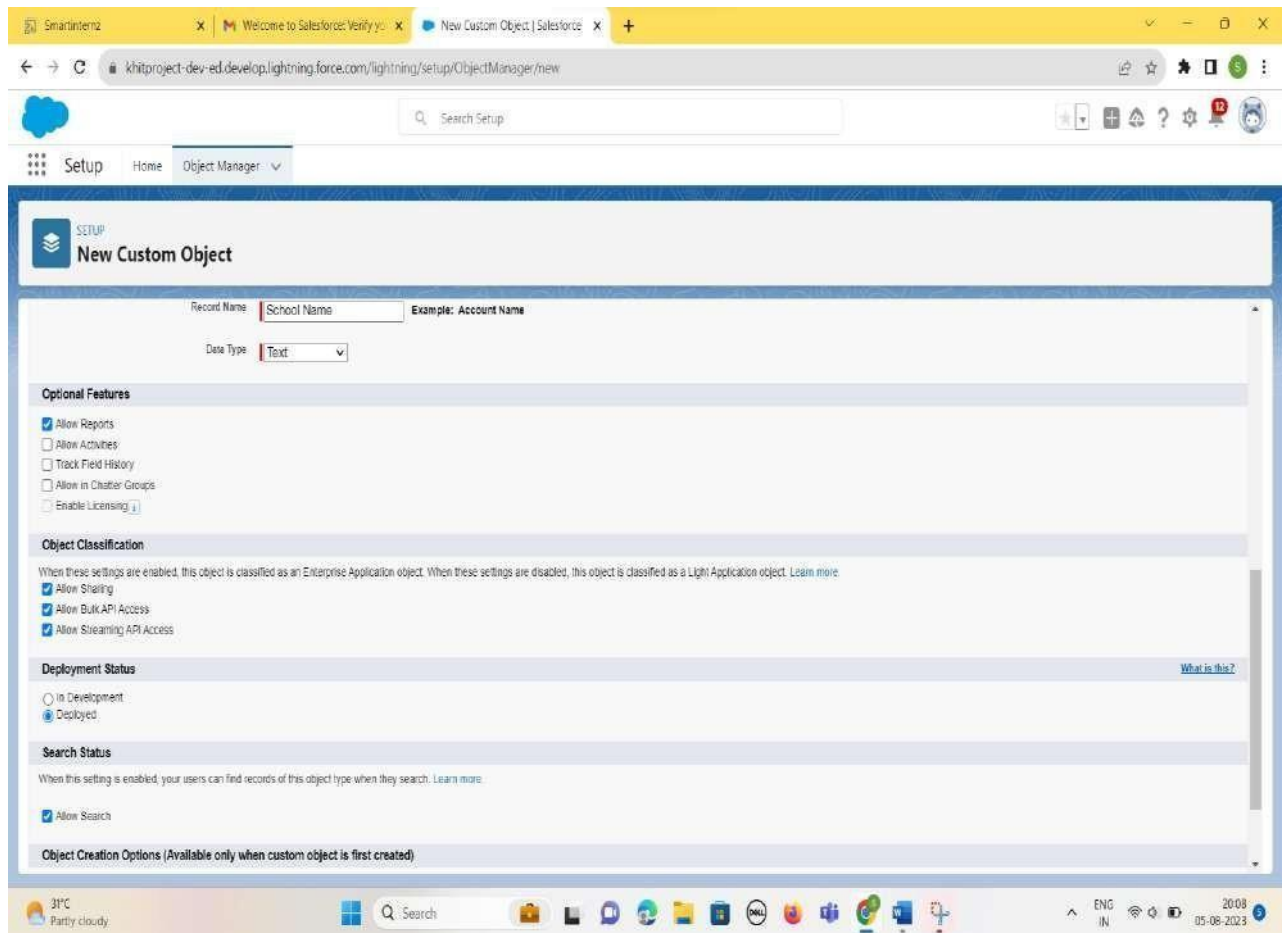
Goto Object Manager and select Custom Object New and Create three objects  
First Object – School

1. Label: School
2. Plural Label: Schools
3. Record Name: School Name
4. Check the Allow Reports checkbox
5. Check the Allow Search checkbox
6. Click Save.

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar indicates the URL is <https://khitproject-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new>. The page title is 'New Custom Object'. A yellow banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get the model](#) [Don't show this message again](#)'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes the following fields and options:

- Label:** School (Example: Account)
- Plural Label:** Schools (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** School (Example: Account)
- Description:** (Empty text area)
- Content Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window, ☐ Open a window using a Visualforce page
- Content Name:** --None--

At the bottom of the page, there is a note: 'Enter Default Name, Label and Format'.




Now create a custom tab. Click the Home tab.

Search for Tabs Then Click it - Custom Tab New






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



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

In the same way, we created the two Custom objects like Student Object and Parent Object and their respective tabs as below:

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

## 4. Creating the Lightning App

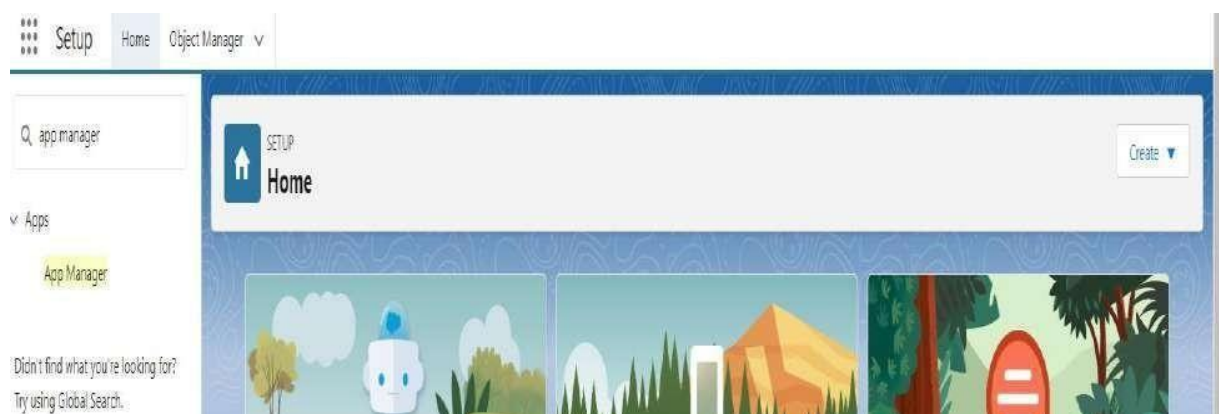
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are two types of app -

**1. Standard App:** Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.

**2. Custom Apps:** Custom apps are created according to the needs of the user. Custom Apps are made by using standard and custom tabs together.

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter School Management as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



## New Lightning App

### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


#### App Details


\* App Name ⓘ  
School Management

\* Developer Name ⓘ  
School Management

Description ⓘ  
Enter a description...

#### App Branding

Image ⓘ  


Primary Color Hex Value ⓘ  
 #0070D2

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

Next

## New Lightning App

dash

- Schools
- Students
- Parents
- Reports
- Dashboards

Back

Next

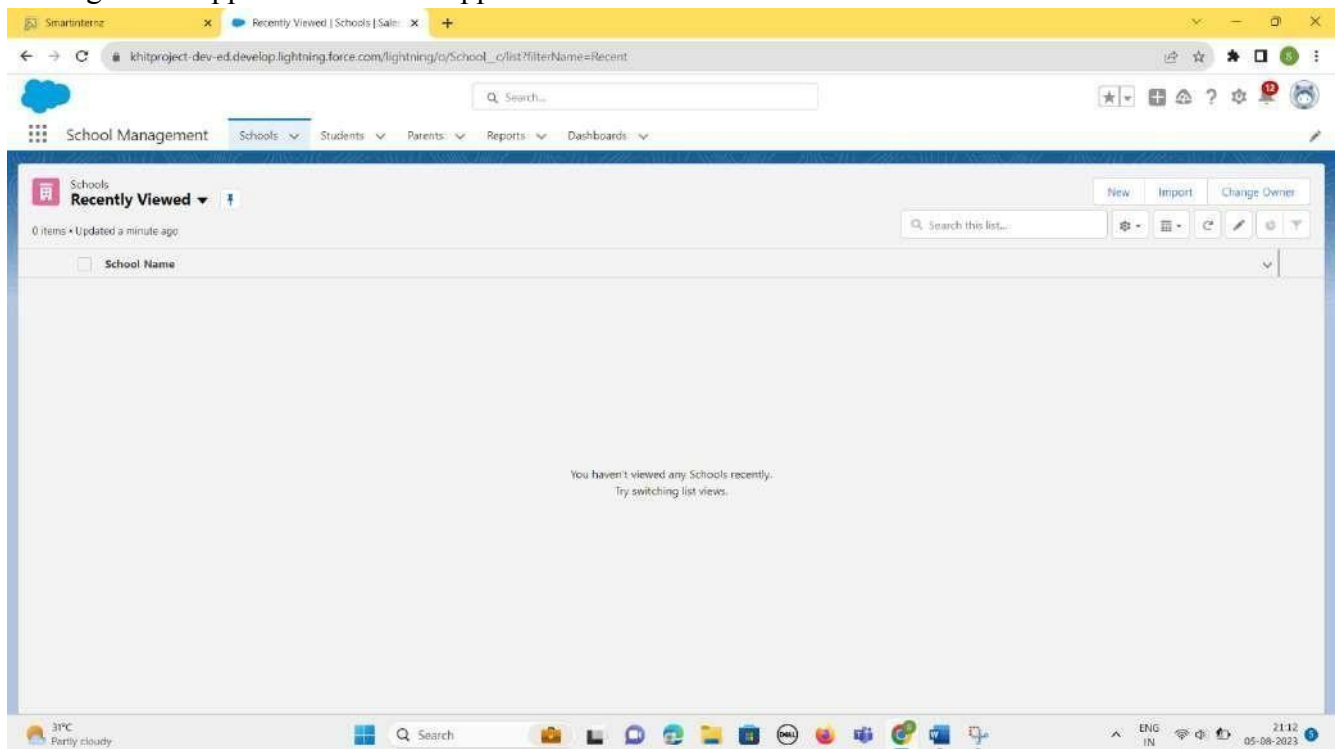
## New Lightning App

System Administrator

grations

Save & Finish

If we want to check the app we have created .Goto App Launcher□Search for the School Management App□Click it. The App looks like this.



## 5.Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

### Creation Of Fields for The School Object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text Area as the Data Type, click Next.
7. For Field Label, enter Address.
8. Click Next, Next, then Save & New.
9. Follow steps 1 to 3 and create two more Text type fields - District & State.
10. Create URL type field & give School website as the field label.

We have to create 5 fields for the School Object. They are – *Address, District, State, Phone, URL* with their respective Relationships.

Setup

Home

Object Manager

Setup > OBJECT MANAGER

School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Fields & Relationships

4 items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
School Name	Name	Text(80)		✓

Setup

Home

Object Manager

Setup > 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

School

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous

Next

Cancel

Field Label

Address

Field Name

Address

Description

Help Text

Required

☐ Always require a value in this field in order to save a record

Auto add to custom report type

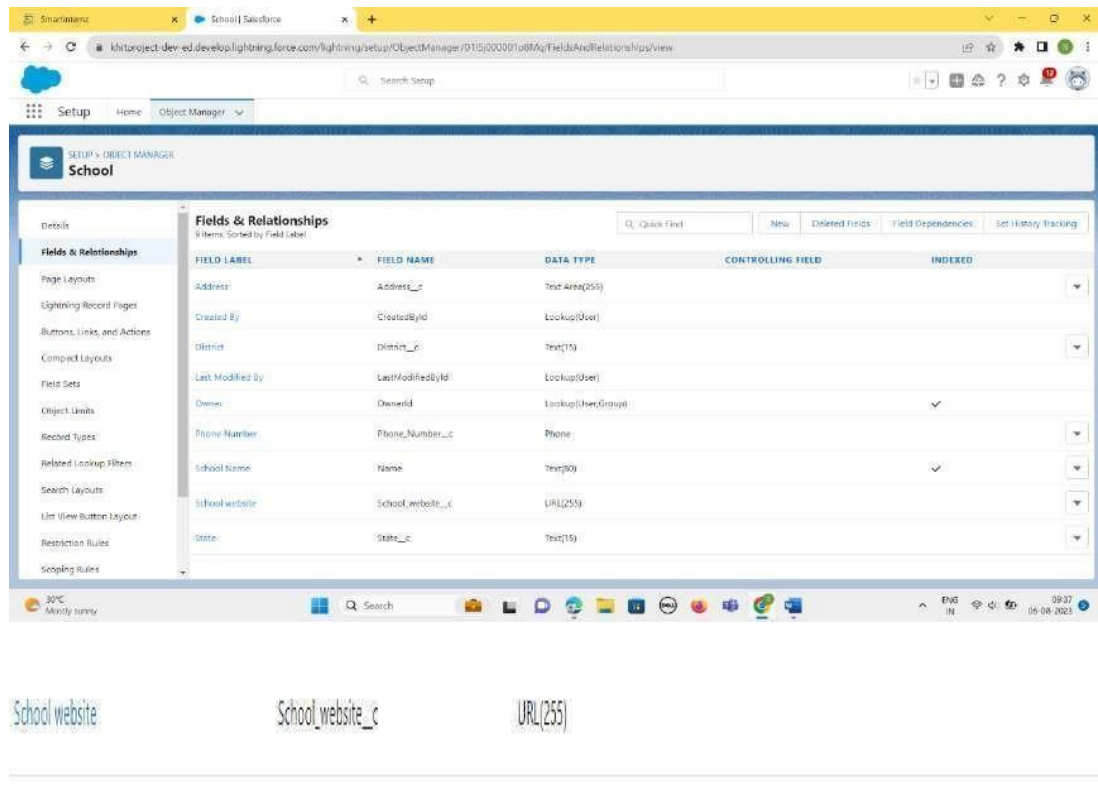
☒ Add this field to existing custom report types that contain this entity

Default Value

Show Formula Editor

Use formula syntax. Enclose text and global value API names in double quotes. "the field", include numbers without quotes, <5%, when percentages or decimals. (1/10), and express data calculations in the standard format: Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType\_\_notRenamedAPINameField\_\_c

After creating all the required fields for the School Object



## Creation Of Fields for The Student Objects:

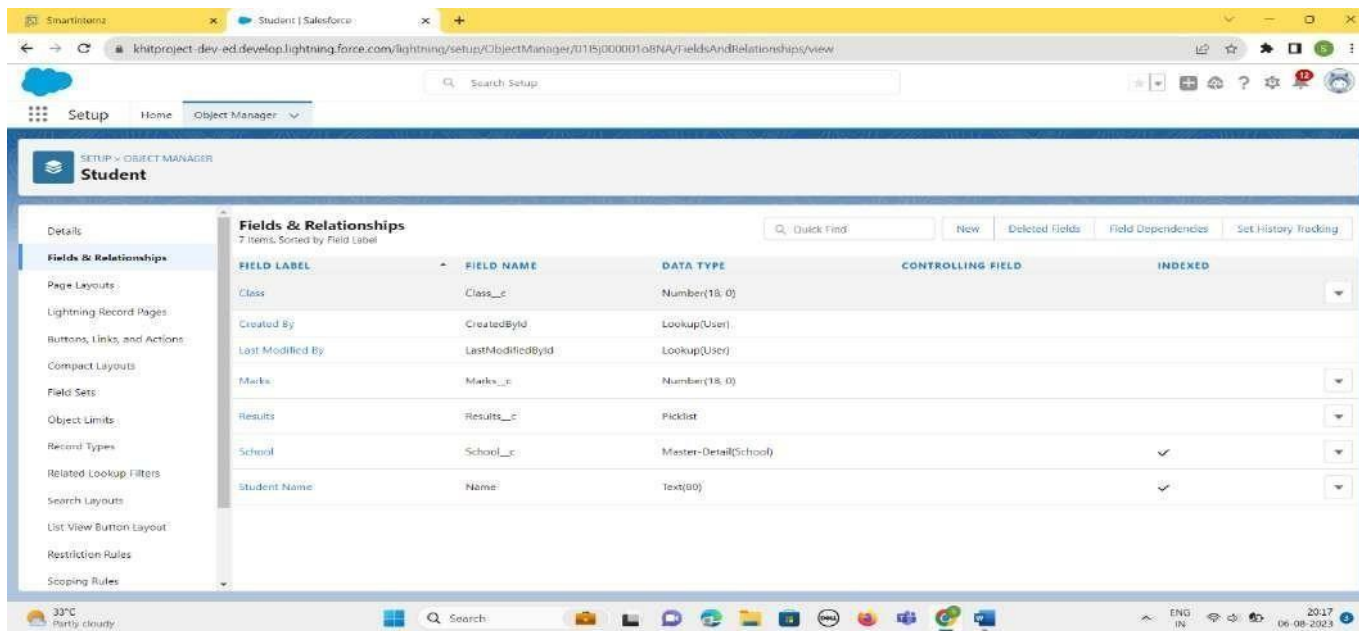
Field 1 – *Results* and Relationship is of Picklist type and we have to enter the picklist values as Pass, Fail.

Field 2–*Class* and Relationship is of Number type

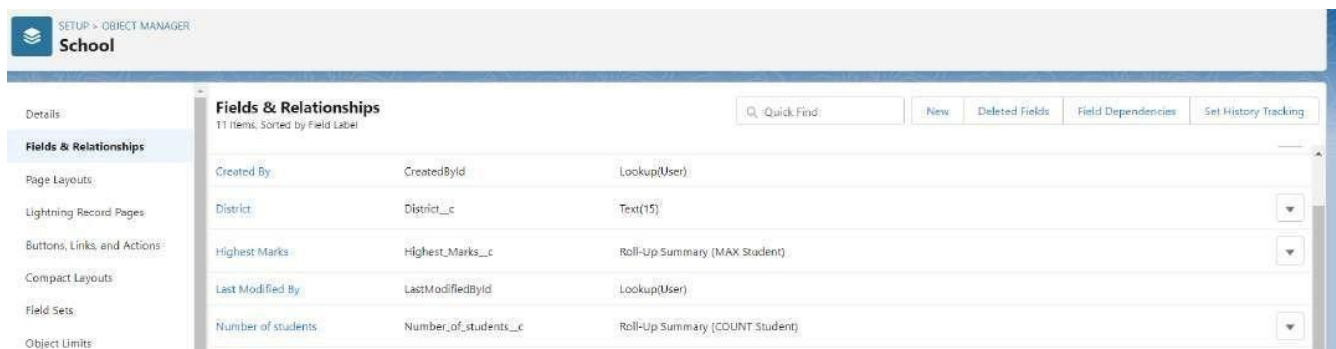
Field 3–*Marks* and Relationship is of Number type

Field 4– *Number of Students* and Relationship is of Roll-up Summary type

After creating the required above fields looks like this



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
District	District__c	Text(15)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Student)		

## Creation Of Fields for The Parent Objects:

We have to create 2 fields

Field1 – *Parent Address* and relationship is of Text area

Field2- *Parent Number* and relationship is of Phone.

After creating the above two fields, it looks like this:



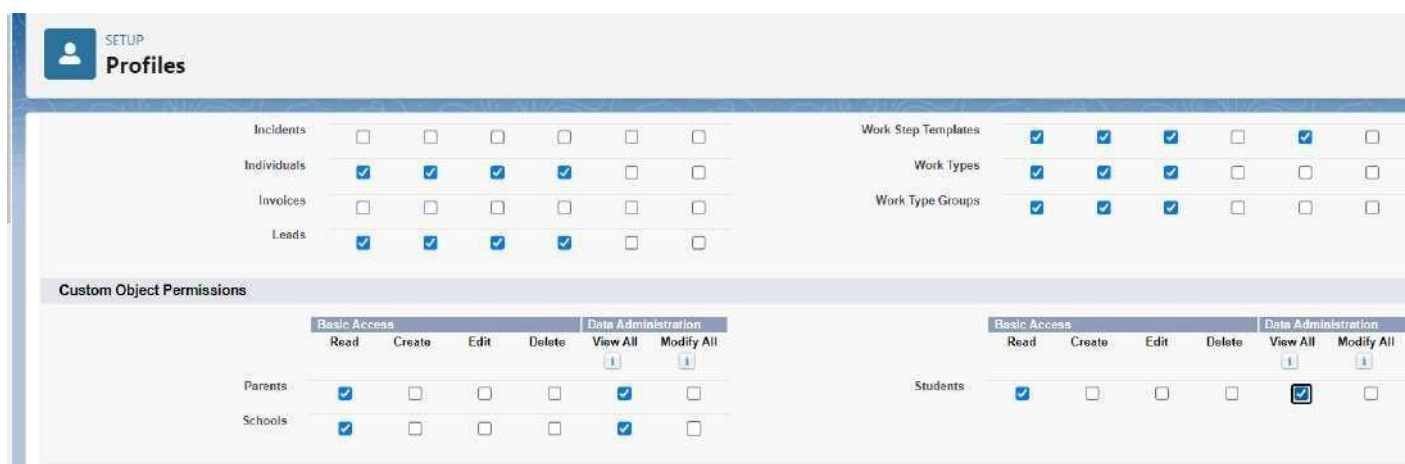
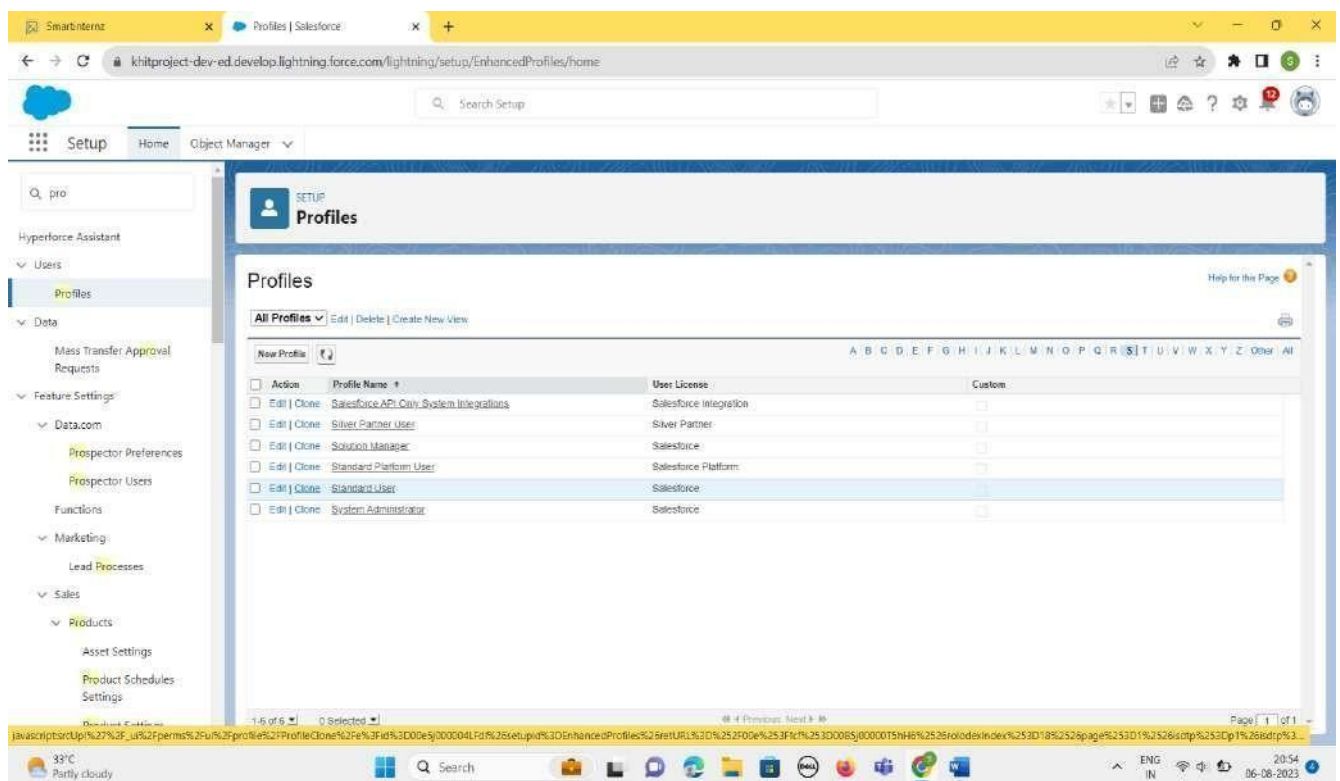
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

## 5.Profile

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

### Creation of Profile:

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





	Parents	<input checked="" 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 checked="" type="checkbox"/>	<input type="checkbox"/>
	Schools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The “School Profile” is created as below:

SETUP

Profiles

Profile

School Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit

Clone

Delete

View Users

Name	School Profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Shaik Ruksana 06/06/2023 8:54 pm	Modified By	Shaik Ruksana 06/06/2023 8:56 pm

SETUP

Profiles

Profile

School Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit

Clone

Delete

View Users

Name	School Profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Shaik Ruksana 06/06/2023 8:54 pm	Modified By	Shaik Ruksana 06/06/2023 8:56 pm



## 7.Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

### Creating A User:


- 1.From Setup, in the Quick Find box, enter Users.
- 2.Select Users.
3. Click New User.
4. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as salesforce.

**NOTE-** As Salesforce license can only be used by 2 Users at a time in Dev Org, So If you don't find a salesforce license then deactivate a user who has a salesforce license or change the license type from Salesforce to any other.

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

The screenshot displays the Salesforce 'New User' setup page. The left sidebar shows the 'Setup' menu with 'Users' selected. The main content area is titled 'New User' and contains a 'User Edit' form. The form is divided into two sections: 'General Information' and 'Role'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Sites.com Contributor User, Sites.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), and High-Contrast Palette on Charts. The 'New User' button is visible at the top right of the form.

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

 **SETUP**  
**Users**

## All Users

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

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users [Edit](#) | [Create New View](#)

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#)

<a href="#">New User</a> <a href="#">Reset Password(s)</a> <a href="#">Add Multiple Users</a>						
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d5j00000cmbz9ead_ehx6v2brlwm@chatter.salesforce.com		✓	Chatter Free Use
<input type="checkbox"/> <a href="#">Edit</a>	Parents	pare	parents.208x1a05g1@khitguntur.ac.in		✓	School Profile
<input type="checkbox"/> <a href="#">Edit</a>	principals	prin	princ208x1a05g1@khitguntur.ac.in		✓	School Profile
<input type="checkbox"/> <a href="#">Edit</a>	Ruksana Shaik	SRuks	ruksanasrilakshmi@project.com		✓	System Administ
<input type="checkbox"/> <a href="#">Edit</a>	Teachers	teac	tea208x1a05g1@khitguntur.ac.in		✓	School Profile
<input type="checkbox"/> <a href="#">Edit</a>	User Integration	integ	integration@00d5j00000cmbz9ead.com		✓	Analytics Cloud I
<input type="checkbox"/> <a href="#">Edit</a>	User Security	sec	insightssecurity@00d5j00000cmbz9ead.com		✓	Analytics Cloud S

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#)

6. Click on add assignment.

7. Click on Teacher (user), Next, Assign.

Setup

Home

Object Manager

per

Performance Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Initial Experience

SETUP

Permission Sets

Help for this Page

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

SETUP

Permission Sets

Permission Set

Create

Save Cancel

Enter permission set information

Label

teacher permission

API Name

teacher\_permission

Description

Session Activation Required

☐

Permission Set

teacher permission

Find Settings

Clone

Delete

Edit Properties

Manage Assignments

Permission Set Overview

>

Object Settings

Schools

Schools

Save

Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

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

... > PERMISSION SET 'TEACHER PERMISSION' > MANAGE ASSIGNMENT EXPIRATION

**teacher permission**

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ  
☐ Specify the expiration date

ⓘ Time Zone

Selected Users

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

## Permission Sets 2:

Similarly, we create another permission set that is Principal permission.

SETUP

**Permission Sets**

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play.

All Permission Sets ▾ [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label ↑	Description
Del   Clone	Principal permission	

## 9. User Adoption

### Create Record (School):

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

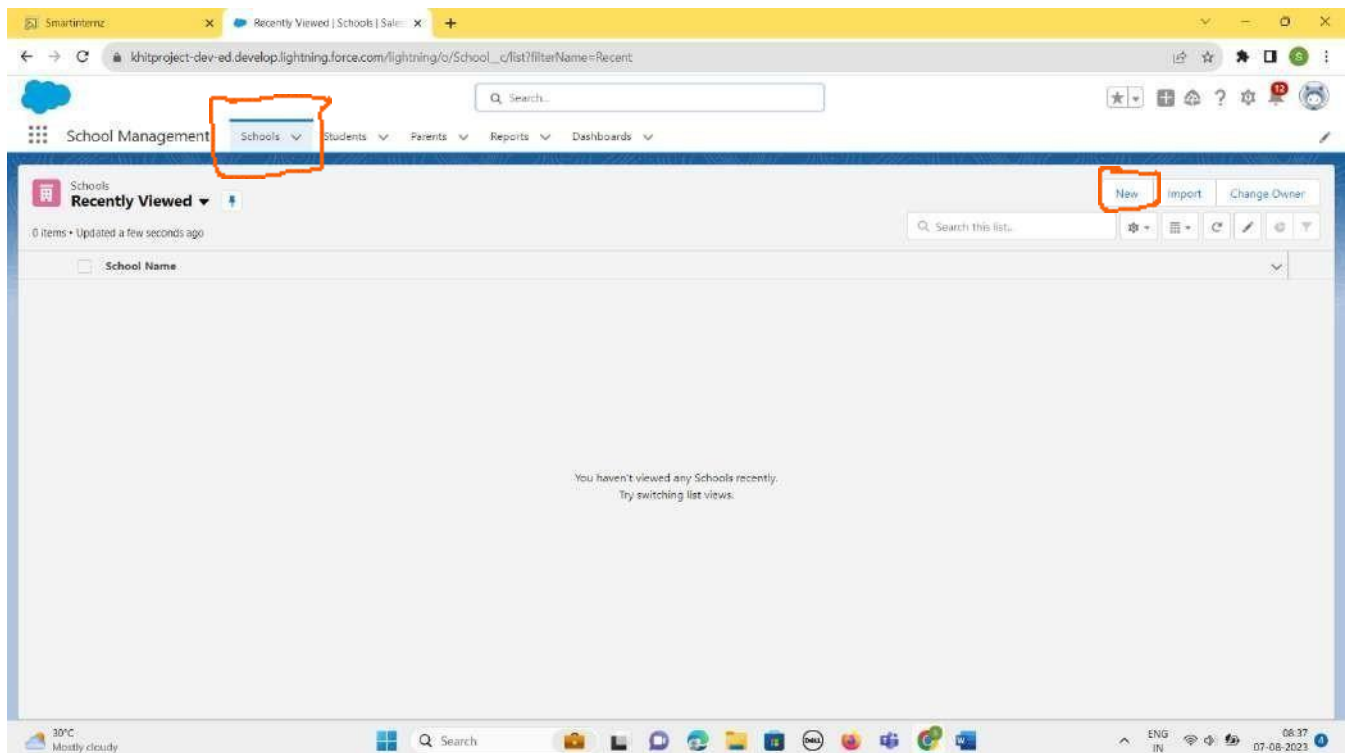
2. Search School Management App & click on it.

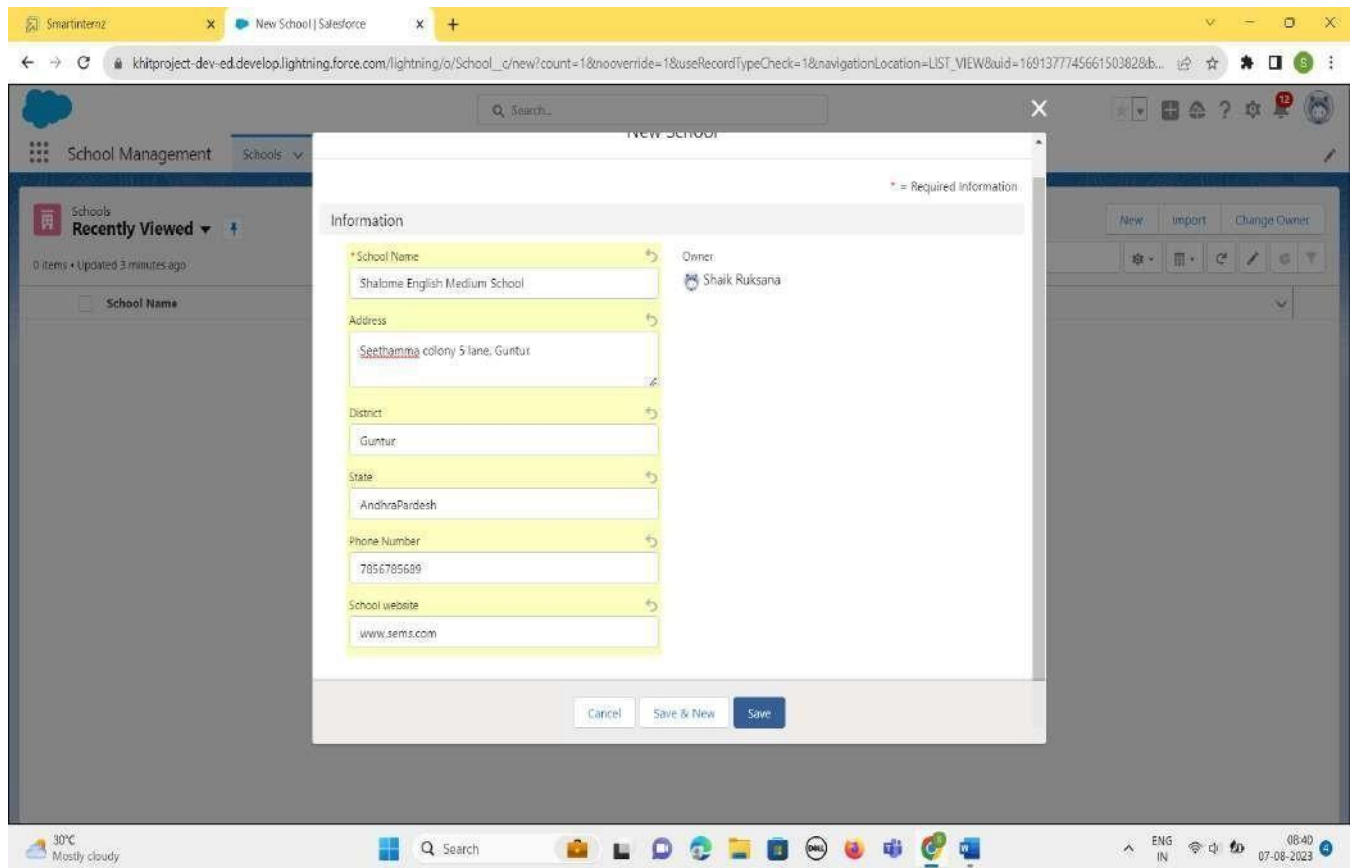
3. Click on the Schools tab.

4. Click new button

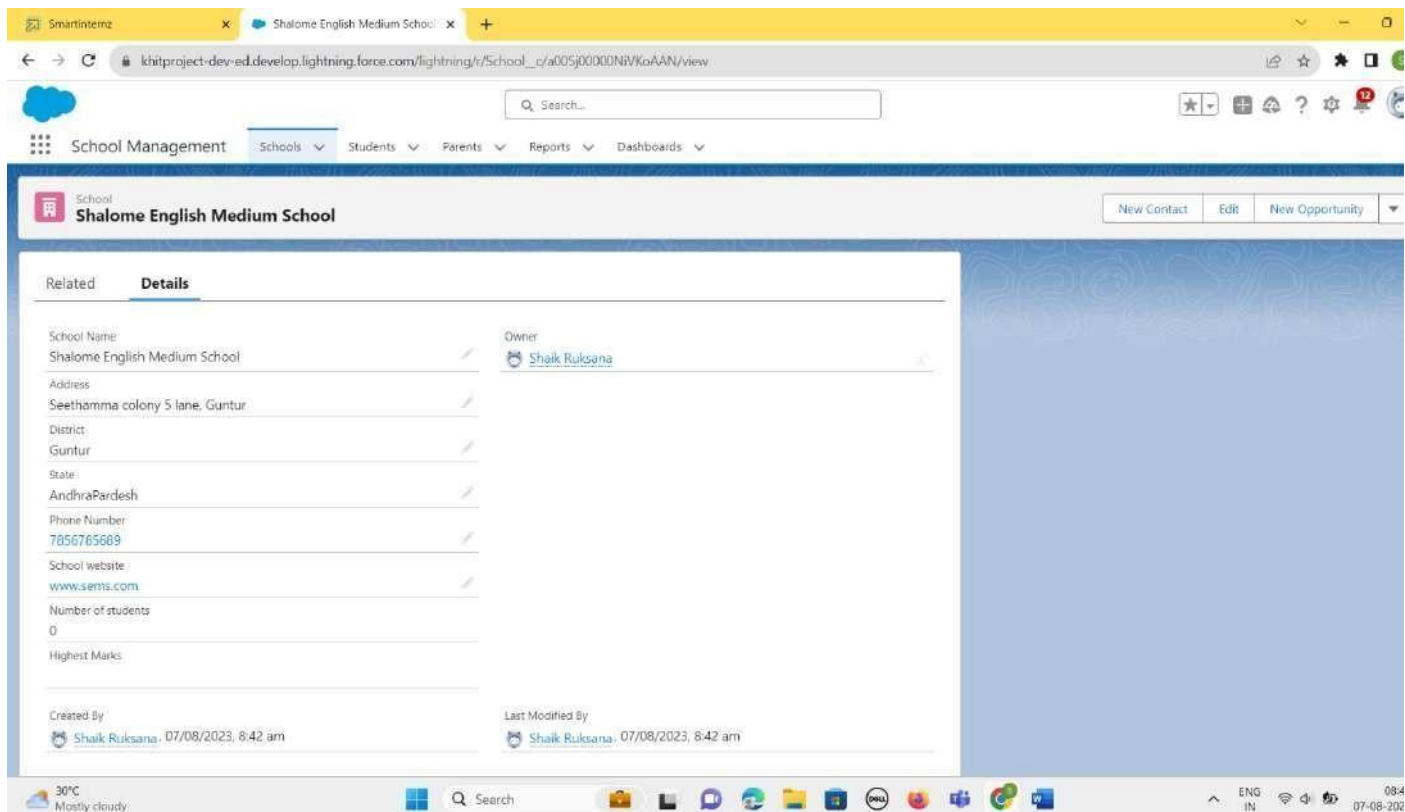
5. Fill all School record details.

6. Click on Save Button





## View Record (School):



## Delete Record (School):

School  
Shalome English Medium School

New Contact Edit New Opportunity

Related Details

School Name  
Shalome English Medium School

Address  
Seethamma colony 5 lane, Guntur

District  
Guntur

State  
Andhra Pradesh

Phone Number  
7856785689

School website  
www.sems.com

Number of students  
0

Highest Marks

Owner  
Shaik Ruksana

New Case  
New Lead  
Delete  
Clone  
Change Owner  
Printable View

School Name

## 10.Reports

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

### Create Report:

- 1.In School Management App click Reports
- tab. 2.Click New Report.
- 3.Select the report type as School with students and parents for the report.
- 4.Click start report.
- 5.Customize your report, then save and run
6. Give report name – Schools with Students  
Report
- 7.Click Save

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

Select a Report Type

sch

Report Type Name	Category
Schools	Standard
Schools with Students	Standard

Details

Schools with Students

Standard Report Type

Start Report

Details

Fields (28)

Created By You

No Reports Yet

Created By Others

No Reports Yet

Objects Used in Report Type

Student

Parent

Now we have to save the report with the Report Name – “*Schools with Students Report*”. Click save & run at the top and save it as below:

School Management

Schools

Students

Parents

Reports

Dashboards

Reports

Recent

1 item

Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Schools with Students Report		Private Reports	Shaik Ruksana	7/8/2023, 9:00 am	
Created by Me						
Private Reports						



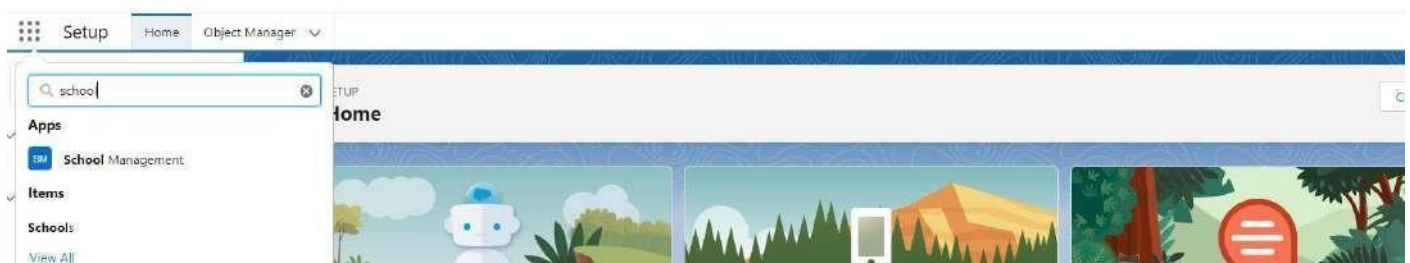
Save Report

**\* Report Name**

**Report Unique Name** ⓘ

**Report Description**

**Folder**



School Management

Schools ▾

Students ▾

Parents ▾

Reports ▾

Dashboards ▾

Search recent reports...

Recent

1 item

REPORTS	Report Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	New Schools with Students Report		Private Reports	Shaik Ruksana	7/6/2023, 9:00 am	

Created by Me

Private Reports

## View Report:

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

In this way, we have successfully created the *School Management App* And performed all the actions.

## ADVANTAGES & DISADVANTAGES

### Advantages:

1. Cloud-based: Being built on the Salesforce platform, the application enjoys the benefits of cloud computing, including scalability, flexibility, and ease of access from anywhere with an internet connection.
2. Integrated Ecosystem: Salesforce offers a wide range of native tools and integrations with third-party applications, enabling seamless integration with other school systems like HR, finance, or communication tools.
3. Customizability: Salesforce provides a highly customizable development environment, allowing the application to be tailored to the specific needs of each educational institution.
4. User-Friendly Interface: With Salesforce's focus on user experience, the application can have an intuitive and user-friendly interface, reducing the learning curve for administrators, teachers, parents, and students.
5. Security and Compliance: Salesforce maintains robust security measures and compliance standards, ensuring data privacy and protection for sensitive student and school information.

### Disadvantages:

1. Cost: Utilizing the Salesforce platform and acquiring user licenses can be costly, especially for smaller educational institutions with limited budgets.
2. Learning Curve: Customizing and developing applications on Salesforce may require specialized skills and expertise, leading to a learning curve for administrators and developers.
3. Dependency on Salesforce: As the application is built on the Salesforce platform, there is a level of dependency on Salesforce's services and updates, which could impact the application's functionality.
4. API Limitations: The Salesforce API has usage limits, and integrating with multiple external systems may require careful planning and optimization to avoid hitting those limits.
5. Data Ownership: Storing data on a third-party platform means the school must trust Salesforce with its sensitive data, which might raise concerns about data ownership and control.
6. Offline Access: Salesforce applications heavily rely on internet connectivity, which might be a limitation in areas with unreliable or limited internet access.

7. Limited Customization in Low-Code Solutions: If the application is built primarily using low-code solutions, there might be some limitations in customizing complex functionalities that require more sophisticated coding

## APPLICATIONS

1. Schools and K-12

Institutions

2. Colleges and Universities

3. Online Learning Platforms

4. Tutoring Centres and Coaching Institutes

5. Non-Profit Educational  
Initiatives.

6. Training and Development Programs

7. Vocational Institutes

8. Special Education  
Programs

9. After-School  
Programs

10. Language Schools

## CONCLUSION

In conclusion, the School Management Application developed on the Salesforce platform offers a comprehensive and efficient solution to streamline administrative tasks and improve communication within educational institutions. Through a user-friendly interface and automation features, the application simplifies attendance tracking, academic management, and examination processes.

## FUTURE SCOPE

The School Management Application in Salesforce has a promising future scope, with several potential enhancements and improvements that can be implemented to further enhance its functionality and impact. Some future enhancements include:

1. Mobile Application: Develop a dedicated mobile application for the school management system, allowing users to access important information and perform essential tasks on their smartphones or tablets for greater convenience and flexibility.

2. Artificial Intelligence Integration: Integrate AI capabilities into the application to provide intelligent insights and recommendations, such as personalized learning paths for students or predictive analytics for student performance.

3. Learning Management System (LMS) Integration: Integrate with popular Learning Management Systems to streamline the delivery of online courses and assignments, providing a comprehensive solution for blended and remote learning.

Parent-Teacher Conference Scheduling: Implement a feature that allows parents to schedule and manage parent-teacher conferences directly through the application, reducing administrative overhead and improving parent-teacher communication.

1. Alumni Management: Extend the application to include an alumni management module, enabling schools to maintain relationships with former students, conduct alumni events, and seek support for various initiatives.

2. Financial Aid and Scholarship Management: Introduce a module to manage financial aid and scholarship applications, making it easier for students to apply and for administrators to track and disburse awards.

3. Classroom IoT Integration: Explore integrating IoT devices in classrooms for smart attendance tracking, environmental monitoring, and other data collection to enhance teaching and learning experiences.

4. Gamification and Rewards: Introduce gamification elements to incentivize positive behaviors and academic achievements among students, fostering a more engaging and rewarding learning environment.

5. Virtual Reality (VR) and Augmented Reality (AR) Support: Explore VR and AR integration for immersive learning experiences and virtual field trips, making education more interactive and engaging.

6. Predictive Analytics for Student Success: Develop predictive analytics models that can identify at-risk students and provide timely interventions to improve retention and academic success.

7. Multilingual Support: Enable multilingual support in the application to cater to diverse language preferences, especially in international schools and institutions.

8. Voice Assistant Integration: Introduce voice-activated assistants to enable users to interact with the application using voice commands, making it more accessible and user- friendly.

