

CREATION OF SCHOOL MANAGEMENT IN SALESFORCE

Creating a school management system in Salesforce involves leveraging Salesforce's robust features to handle various aspects of school administration, such as student enrollment, attendance tracking, grade management, communication, and more. Here's a high-level overview of how you can approach building a school management system in Salesforce:

1. Data Model:

- **Students:** Create a custom object to store student information (name, contact details, address, etc.).
- **Teachers:** Create a custom object for teacher details.
- **Classes:** Another custom object for class information (class name, schedule, etc.).
- **Subjects:** Custom object to store subjects taught in the school.
- **Enrollments:** A junction object to establish many-to-many relationships between students and classes.

2. Automation:

- **Workflows:** Set up workflows for automating tasks such as sending notifications for missing assignments or upcoming exams.

- **Process Builder:** Create processes for tasks like enrollment approval workflows or sending reminders for fee payments.
- **Flows:** Use flows for more complex processes, like handling student transfer requests.

3. Communication:

- **Email Templates:** Create email templates for various communications like event invitations, report card distribution, etc.
- **Mass Email:** Utilize Salesforce's mass email feature for sending newsletters or important updates to parents and staff.

4. Attendance Tracking:

- **Custom Objects/Fields:** Create custom objects/fields to track daily attendance for students and teachers.
- **Validation Rules:** Implement validation rules to ensure accurate attendance data entry.

5. Grade Management:

- **Custom Objects/Fields:** Create custom objects/fields to store grades for different subjects and assignments.
- **Reports and Dashboards:** Utilize Salesforce's reporting capabilities to generate grade reports, class performance summaries, etc.

- **Chatter:** Enable Chatter for real-time discussions between teachers, students, and parents regarding grades and assignments.

6. Integration:

- **External Systems:** Integrate with external systems for features like online payments, library management, or learning management systems.
- **APIs:** Use Salesforce APIs to connect with third-party applications securely.

7. Security:

- **Profiles and Permissions:** Set up profiles and permissions to control access based on roles (students, teachers, administrators).
- **Field-Level Security:** Ensure sensitive information is protected using field-level security settings.
- **Data Encryption:** Utilize Salesforce's built-in encryption mechanisms for data security.

8. Mobile Access:

- **Salesforce Mobile App:** Leverage the Salesforce mobile app for on-the-go access to the school management system.
- **Custom Mobile Apps:** If necessary, develop custom mobile apps using Salesforce Mobile SDK for specific functionalities.

9. User Training and Support:

- **Training:** Provide training sessions to staff for effective use of the Salesforce system.
- **Documentation:** Create detailed documentation for using different features and processes.
- **Support System:** Set up a support system for addressing user queries and issues promptly.

10. Testing and Iteration:

- **Testing:** Rigorous testing of the system to ensure all functionalities work as intended.
- **User Feedback:** Gather feedback from users (teachers, students, parents) and iterate on the system based on their input.

Remember, Salesforce provides extensive documentation and a strong community where you can find support and additional resources while building your school management system.

PHONE NUMBER

school Custom Field

Help for this Page ?

Phone Number

[Back to school](#)

[Validation Rules](#) [0]

Custom Field Definition Detail

- Edit
- Set Field-Level Security
- View Field Accessibility
- Where is this used?

Field Information

Field Label	Phone Number	Object Name	<u>school</u>
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	<u>RISHI K.</u> 25/10/2023, 3:21 pm	Modified By	<u>RISHI K.</u> 25/10/2023, 3:21 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

SCHOOL WEBSITE

school Custom Field

schoolwebsite

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[Help for this Page](#) ?

[Validation Rules](#) (0)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	schoolwebsite	Object Name	<u>school</u>
Field Name	schoolwebsite	Data Type	URL
API Name	schoolwebsite__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	<u>RISHI K.</u> , 25/10/2023, 3:19 pm	Modified By	<u>RISHI K.</u> , 25/10/2023, 3:19 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules

[New](#)

[Validation Rules Help](#) ?

No validation rules defined.

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Always show me [▼ more records per related list](#)

DISTRICT

school Custom Field

[Help for this Page](#)

District

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[Validation Rules](#) [0]

Custom Field Definition Detail

[Edit](#)

[Set Field-Level Security](#)

[View Field Accessibility](#)

[Where is this used?](#)

Field Information

Field Label	District	Object Name	<u>school</u>
Field Name	District	Data Type	Text Area
API Name	District__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	<u>RISHI K.</u> , 25/10/2023, 3:15 pm	Modified By	<u>RISHI K.</u> , 25/10/2023, 3:15 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules

[New](#)

[Validation Rules Help](#)

No validation rules defined.

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STATE

school Custom Field

Help for this Page ?

State

[Back to school](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	State	Object Name	<u>school</u>
Field Name	State	Data Type	Text Area
API Name	State__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	<u>RISHI K.</u> , 25/10/2023, 3:14 pm	Modified By	<u>RISHI K.</u> , 25/10/2023, 3:14 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

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ADDRESS

school Custom Field

Help for this Page ?

Address

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[Validation Rules](#) (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Address	Object Name	<u>school</u>
Field Name	Address	Data Type	Text Area
API Name	Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	<u>RISHI K.</u> 25/10/2023, 3:12 pm	Modified By	<u>RISHI K.</u> 25/10/2023, 3:12 pm

General Options

Required ☐

Default Value

Validation Rules

New

[Validation Rules Help](#) ?

No validation rules defined.

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SCHOOLS

Custom Object Tab

[Help for this Page](#)

schools

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

[Edit](#) [Delete](#)

Tab Label ***schools***

Tab Style



Object ***school***

Splash Page Custom Link

Description

Created By ***RISHI K.*** 25/10/2023, 3:05 pm

Modified By ***RISHI K.*** 25/10/2023, 3:05 pm

PARENTS

Custom Object Tab

[Help for this Page](#) 

parents

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail		<div>EditDelete</div>
Tab Label	parents	Tab Style <div><div>Guitar</div></div>
Object	<u>parent</u>	Splash Page Custom Link
Description		
Created By	<u>RISHI K</u> , 25/10/2023, 2:59 pm	Modified By <u>RISHI K</u> , 25/10/2023, 2:59 pm

STUDENTS

Custom Object Tab

[Help for this Page](#) 

students

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail		<div>Edit</div>	<div>Delete</div>
Tab Label	students	Tab Style	<div><div></div><div>Bottle</div></div>
Object	<u>student</u>	Splash Page Custom Link	
Description			
Created By	<u>RISHI K.</u> , 25/10/2023, 2:57 pm	Modified By	<u>RISHI K.</u> , 25/10/2023, 2:57 pm

Fields & Relationships

SCHOOL

Naan Mu x - Student x Login | S x school | S x Login | S x New Tab x New Tab x with hub x What spe x

← → C mamcollegeofengineering-a5-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115h000002RScU/FieldsAndRelationships/page?address=%2F...

Search Setup

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

school Custom Field
Phone Number
[Back to school](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Phone Number	Object Name	school
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	RISHI K, 25/10/2023, 3:21 pm	Modified By	RISHI K, 25/10/2023, 3:21 pm

General Options

Required ☐

Default Value

Type here to search

30°C Haze 17:05 30-10-2023

STUDENTS

Naan Mu x - Student x Login | S x parent | S x Login | S x New Tab x New Tab x with hub x What spe x +

mamcollegeofengineering-a5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000002RScj/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

6 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)		✓
parent Name	Name	Text(80)		✓
Parents address	Parents_address_c	Text Area(255)		
Parents number	Parents_number_c	Phone		

Type here to search 29°C 17:06 30-10-2023

PARENTS

Naan Mu x - Student x Login | S x parent | S x Login | S x New Tab x New Tab x with hub x What spe x

mamcollegeofengineering-a5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115h000002RScj/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
parent

Details

Fields & Relationships
6 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)		✓
parent Name	Name	Text(80)		✓
Parents address	Parents_address_c	Text Area(255)		
Parents number	Parents_number_c	Phone		

Type here to search

29°C 17:06 30-10-2023

FLOWS

The screenshot displays the Salesforce Flow Builder interface. The top navigation bar includes a back arrow, the 'Flow Builder' title, and a user profile icon. Below this is a toolbar with buttons for 'Select Elements', undo/redo, and a settings icon. On the right side of the toolbar are buttons for 'Auto-Layout', 'Run', 'Debug', 'View Tests', 'Activate', 'Save As', and 'Save'.

The main workspace is divided into two panels. The left panel shows a flow diagram starting with a 'Start' node (Record-Triggered Flow) for the 'school' object. The trigger is 'A record is created', optimized for 'Actions and Related Records'. Below the trigger are links to 'Add Scheduled Paths (Optional)' and 'Open Flow Trigger Explorer for school'. The flow continues to a 'Run Immediately' node, followed by an 'End' node.

The right panel contains configuration options for the trigger:

- Select Object:** A text input field containing 'school'.
- Configure Trigger:** A section titled '* Trigger the Flow When:' with four radio button options:
 - ☒ A record is created
 - ☐ A record is updated
 - ☐ A record is created or updated
 - ☐ A record is deleted
- Set Entry Conditions:** A section with explanatory text and a 'Condition Requirements' dropdown menu set to 'None'.

The bottom of the screen shows a Windows taskbar with a search bar, application icons, and system status information including temperature (30°C), time (16:58), and date (30-10-2023).