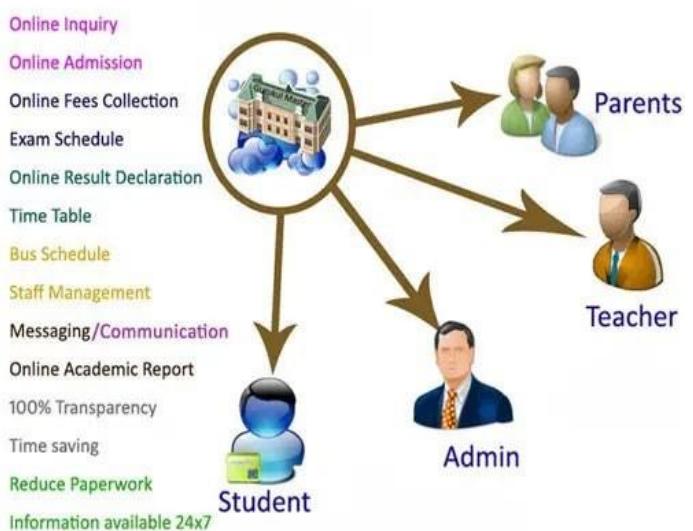




Project Title: Creation of an Application for School

Management – Admin



Presented By

Team ID: LTVIP2023TMID06114

TEAM DETAILS:

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Introduction

Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the questions.

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

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

Overview:

A school management system is an information management system for educational institutions to manage student data. It helps teachers get information about students faster, easier and reduces their workload.

Student databases in school management systems contain information about the students, such as their exam grades, parent information, medical history, tuition fees, etc.

Purpose:

School management systems provide skills such as student registration, class documents, grades, analytical grades for students, and other assessment elements. In addition, school management systems are used to plan the curriculum of students, record their presence and manage the needs of students in the school.

School management solutions are web and mobile-based applications with centralized data storage structures that make it easier for administrators, students, teachers, and parents to access data from iPhone and Android devices

LITERATURE SURVEY

Existing Problems:

- **Inefficiencies:** Manual processes are time-consuming and error-prone. Spreadsheets can be difficult to manage and update, and they can be easily corrupted. Disparate software systems can lead to data silos, which makes it difficult to get a complete picture of a student's academic record.
- **Data inconsistencies:** When data is stored in multiple systems, it is easy for it to become inconsistent. This can lead to inaccurate reports and decisions.
- **Communication gaps:** When there is no central communication platform, it can be difficult for teachers, parents, and administrators to communicate with each other. This can lead to misunderstandings and delays.
- **Increased costs:** Schools may need to hire more staff to handle administrative tasks, or they may need to invest in expensive software.
- **Reduced productivity:** Teachers and administrators may spend a significant amount of time on administrative tasks, which takes away from time they could be spending on teaching and learning.

- **Poor student outcomes:** When students' academic records are inaccurate or incomplete, it can make it difficult for them to get the help they need.
- **Dissatisfied parents and guardians:** Parents and guardians may be frustrated with the lack of communication from the school, or they may be concerned about the security of their child's data.

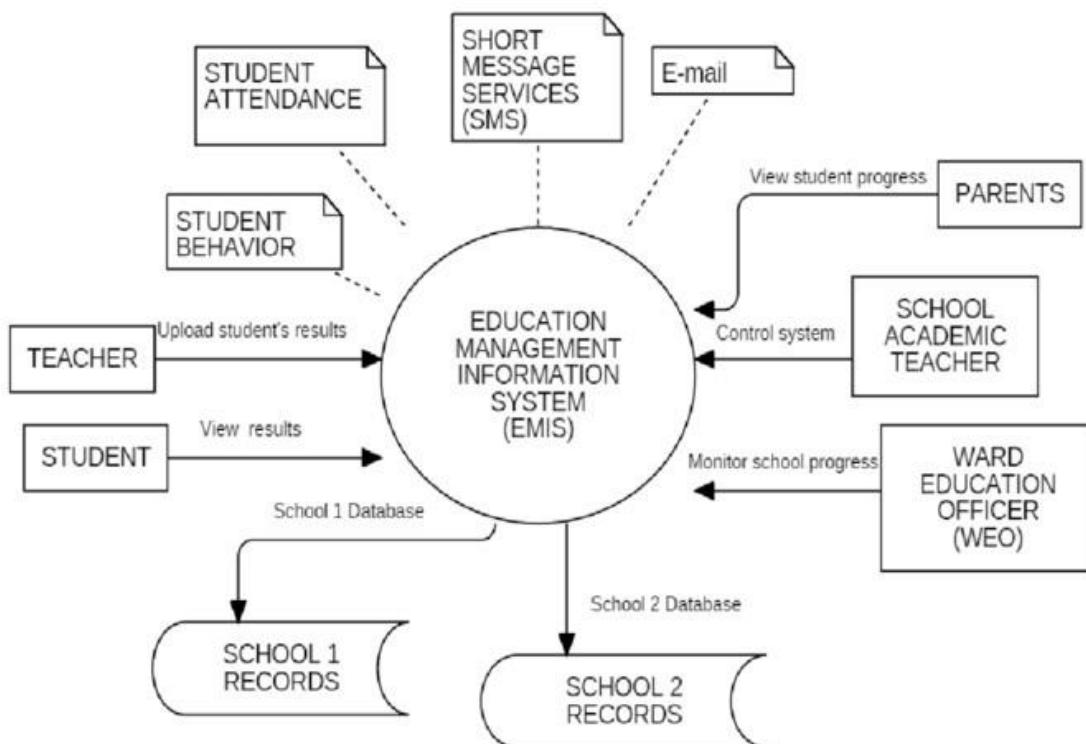
Proposed Solution:

- A comprehensive cloud-based school management application will be developed.
- The application will have an intuitive interface, automation features, and seamless integration.
- It will facilitate efficient attendance tracking, academic management, and communication among teachers, parents, students, and administrators.
- The application will provide valuable insights through analytics and reports, ensuring data-driven decisionmaking.
- The application will have robust security measures and customization options, allowing schools to enhance overall efficiency and productivity, creating a more streamlined and effective learning environment.

Overall, the proposed solution is a comprehensive and innovative approach to school management. It has the potential to significantly improve the efficiency, productivity, and effectiveness of school operations.

THEORITICAL ANALYSIS

Process 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:

1. Hardware Requirements

The following hardware requirements are essential for running the School Management Application on the Salesforce platform:

- A computer with a minimum of 4GB of RAM and 20GB of free disk space.
- A web browser that supports HTML5 and JavaScript.
- A reliable internet connection

2.Salesforce Platform Requirements

- Salesforce Account
- Edition
- Licenses

3.Salesforce Limits and Allocations

- API Limits
- Data Storage
- Custom Objects and Fields

4.Security and Compliance

- Data Privacy
- User Authentication

5.Customization and Development

- Development Environment
- Integration Requirements

6.User Training and Support

- User Training
- Technical Support

PROCESS AND RESULTS

1.Creating Developer Org:

Creating a developer org in salesforce

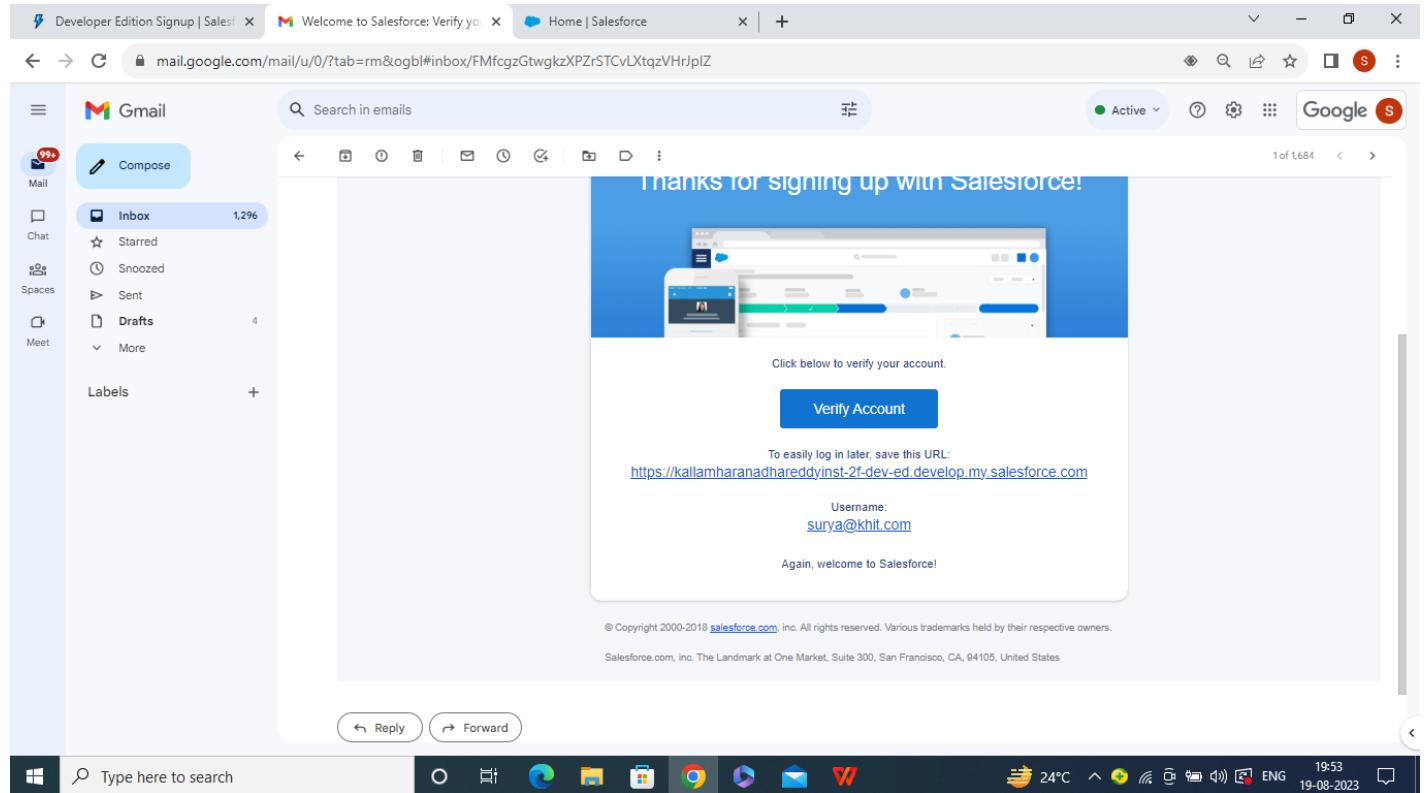
- Go to developer.salesforce.com
- Click on sign up.
- On the signup form, enter the following details
- First name & Last name
- Email
- Role – Administrator
- Company - College Name
- Country – India
- Postal Code - pin code

The screenshot shows a web browser window with the URL developer.salesforce.com/signup. The page has a blue header with the text "Build enterprise-quality apps fast to bring your ideas to life". Below the header, there is a list of features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The main form consists of several input fields: "First Name*" with value "NUKALA", "Last Name*" with value "NAGA MALLESWARA VENAKAT...", "Email*" with value "206x1a05f7@khitguntur.ac.in", "Role*" with value "Administrator", "Company*" with value "KALLAM HARANADHA REDDY INSTITUTE OF TECHNOLOGY", "Country/Region*" with value "India", "Postal Code*" with value "522003", and "Username*" with value "surya@khit.com". There is also a checkbox labeled "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." A note below the username field states: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." At the bottom of the form, there is a note: "Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time." Another note at the very bottom says: "By registering, you confirm that you agree to the processing of your personal information." The browser taskbar at the bottom shows various pinned icons and the system clock indicating 19:52 on 19-08-2023.

Username- should be a combination of your name and company

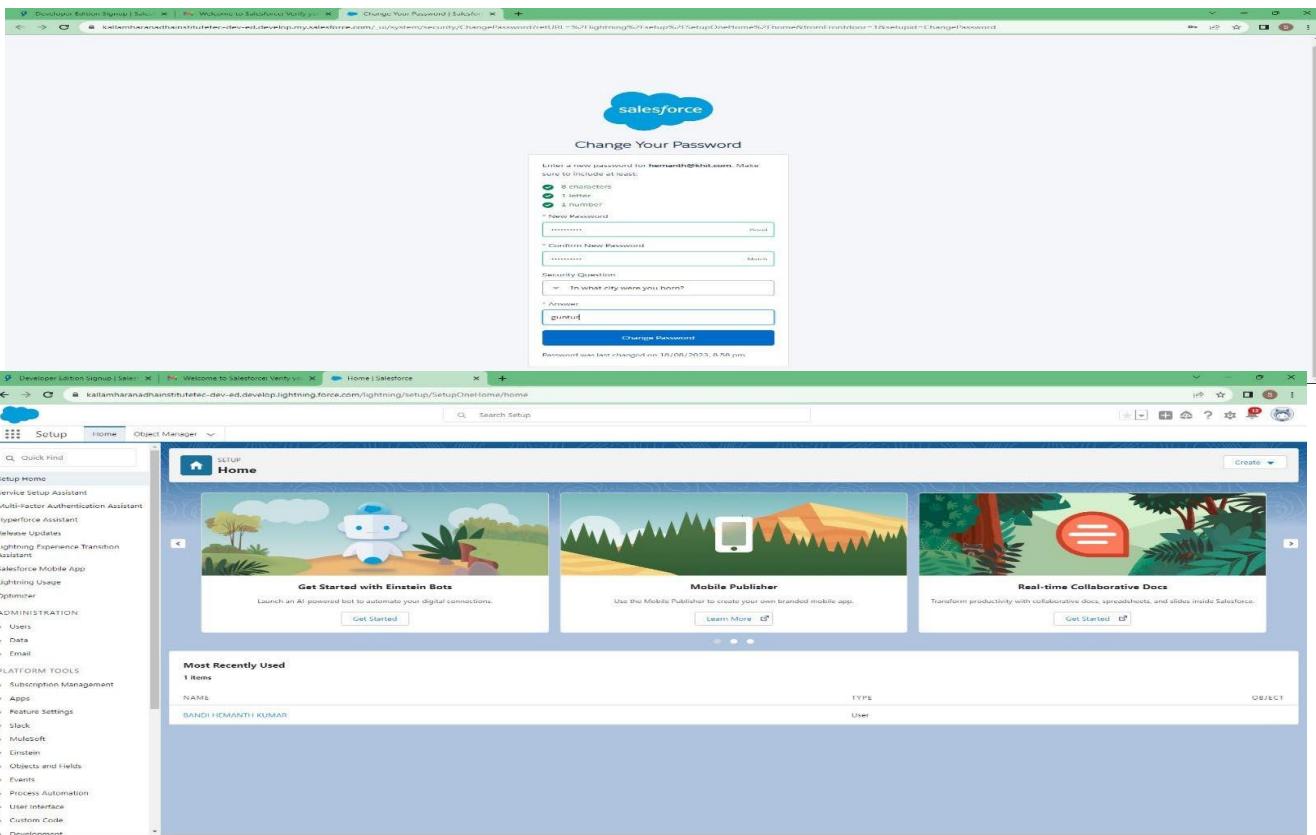
Account Activation:

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

- Go to salesforce.com and click on login.
- Enter the username and password that you just created.
- After login this is the home page which you will see.



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.

Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Salesforce objects are of two types:

- **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.

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.

The screenshot shows the Salesforce Object Manager page. It lists various standard objects with their API names, types, descriptions, and last modified dates. The objects include Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, Assigned Resource, Associated Location, Authorization Form, Authorization Form Consent, Authorization Form Date Use, Authorization Form Test, and Business Brand. The 'Last Modified' column shows dates ranging from January 2023 to April 2023.

The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. It includes fields for Record Name, Label and Format, Optional Features (Allow Reports, Allow Search, Track Field History, Allow in Chatter Comments), Object Classification (Enterprise Application or Light Application), Deployment Status (In Development or Deployed), and General Status (Admin Review). The 'Object Creation Options' section allows adding notes and attachments or launching a tab wizard. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

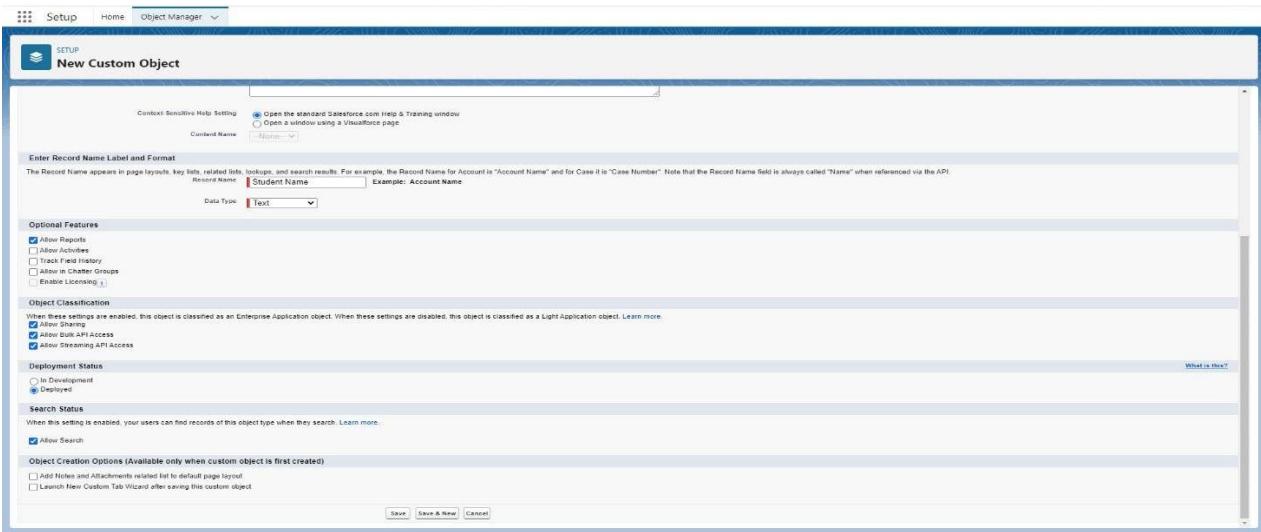
Now create a custom tab. Click the Home tab.

The screenshot shows the 'Tabs' setup page. It's titled 'New Custom Object Tab' and is Step 1 of 3. It asks to choose a custom object for the tab, with 'School' selected. It also asks for a tab style (purple) and an optional splash page custom link (None). A description field is present, and at the bottom are 'Next' and 'Cancel' buttons.

Create Student Object

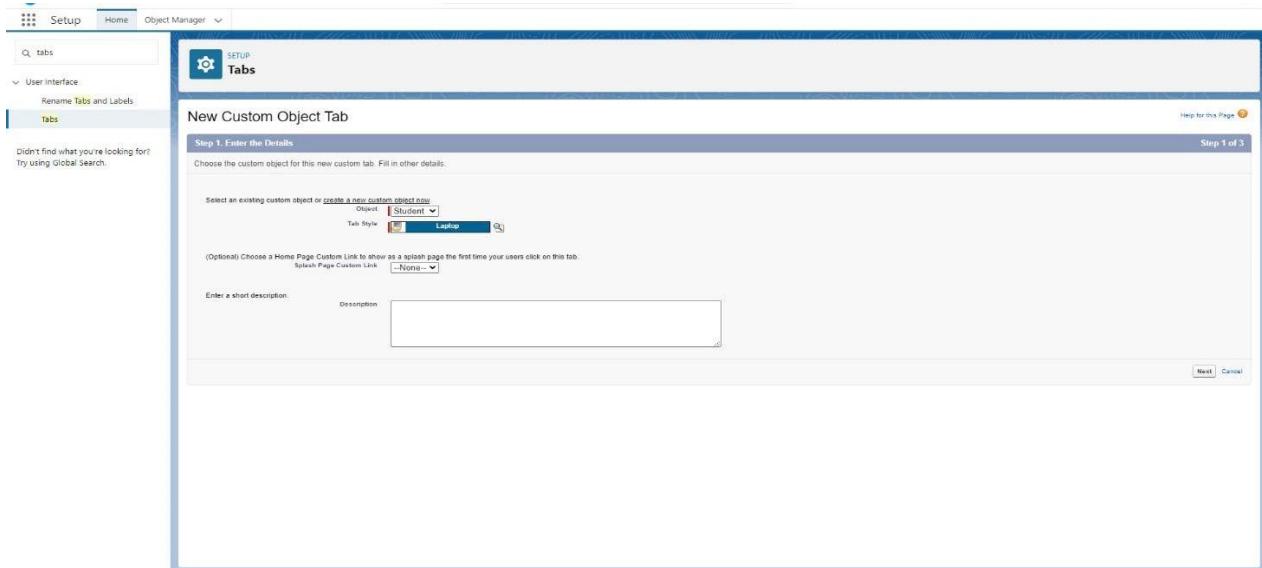
1. Click on the gear icon and then select Setup.
 2. Click on the object manager tab just beside the home tab
 3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- On the Custom Object Definition page, create the object as 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.

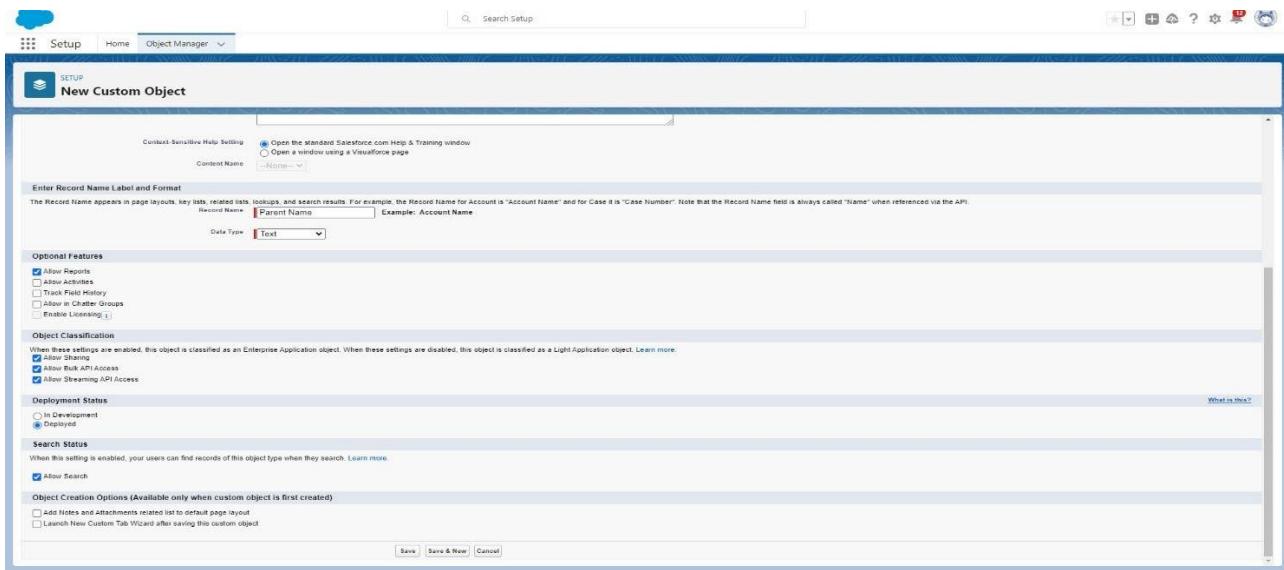
1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



Create Parent Object

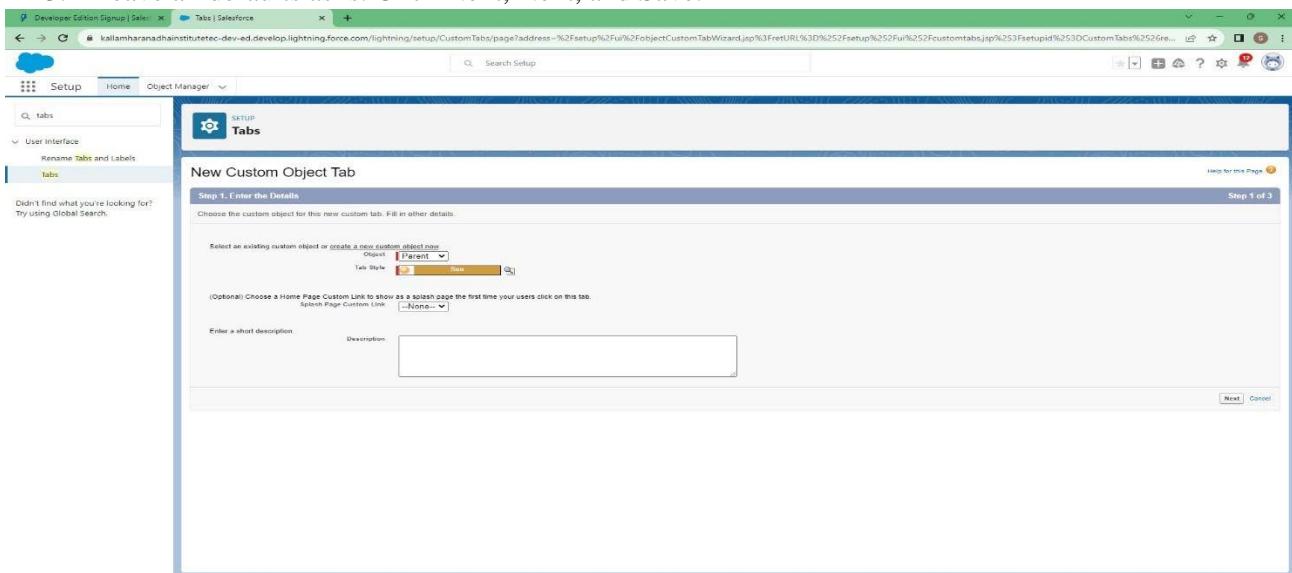
Click on the gear icon and then select Setup.

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 -
- Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.
- Note: The description, Logo, and Label of standard app cannot be altered.
- Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.
- Note: Logos for Custom Apps can be changed.

Create The School Management App

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter School Management as the App Name, then click Next 4. Under App Options, leave the default selections and click Next.

5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

The screenshot shows the 'Lightning Experience App Manager' interface. On the left, there's a sidebar with 'App Manager' selected. The main area displays a table of 21 items, sorted by App Name, filtered by All components - TabSet type. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visible. Apps listed include All Tabs, Analytics Studio, App Launcher, Roi Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, Sales, Sales Console, Salesforce Chatter, Salesforce Scheduler Setup, Service, Service Console, Site.com, and Subscription Management.

This screenshot shows the 'New Lightning App' configuration page. It includes sections for 'App Details & Branding' (App Name: School Management, Developer Name: School_Management, Description: Enter a description...), 'App Branding' (Image: a circular icon with various icons, Primary Color Hex Value: #0070D2), and 'Org Theme Options' (checkbox: Use the app's image and color instead of the org's custom theme). To the right, there are sections for 'Navigation and Form Factor' (Standard navigation shows items in a navigation bar at the top of the page. Console navigation shows a list of records or a menu and opens each record in a separate tab. Mobile navigation shows the form factor where this app is available), 'Setup and Personalization' (Setup Experience: Setup full set of setup options, Service Setup), and 'App Personalization Settings' (checkboxes: Disable end user personalization of nav items in this app, Disable temporary tabs for items outside of this app).

This screenshot shows the 'Navigation Items' configuration page. It has two main sections: 'Available Items' (containing 'dash', 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards') and 'Selected Items' (containing 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'). Below these are buttons for moving items between lists and a 'Next' button at the bottom.

This screenshot shows the 'User Profiles' configuration page. It has two sections: 'Available Profiles' (containing 'System Administrator') and 'Selected Profiles' (containing 'System Administrator'). Below these are buttons for moving profiles between lists and a 'Save & Finish' button at the bottom.

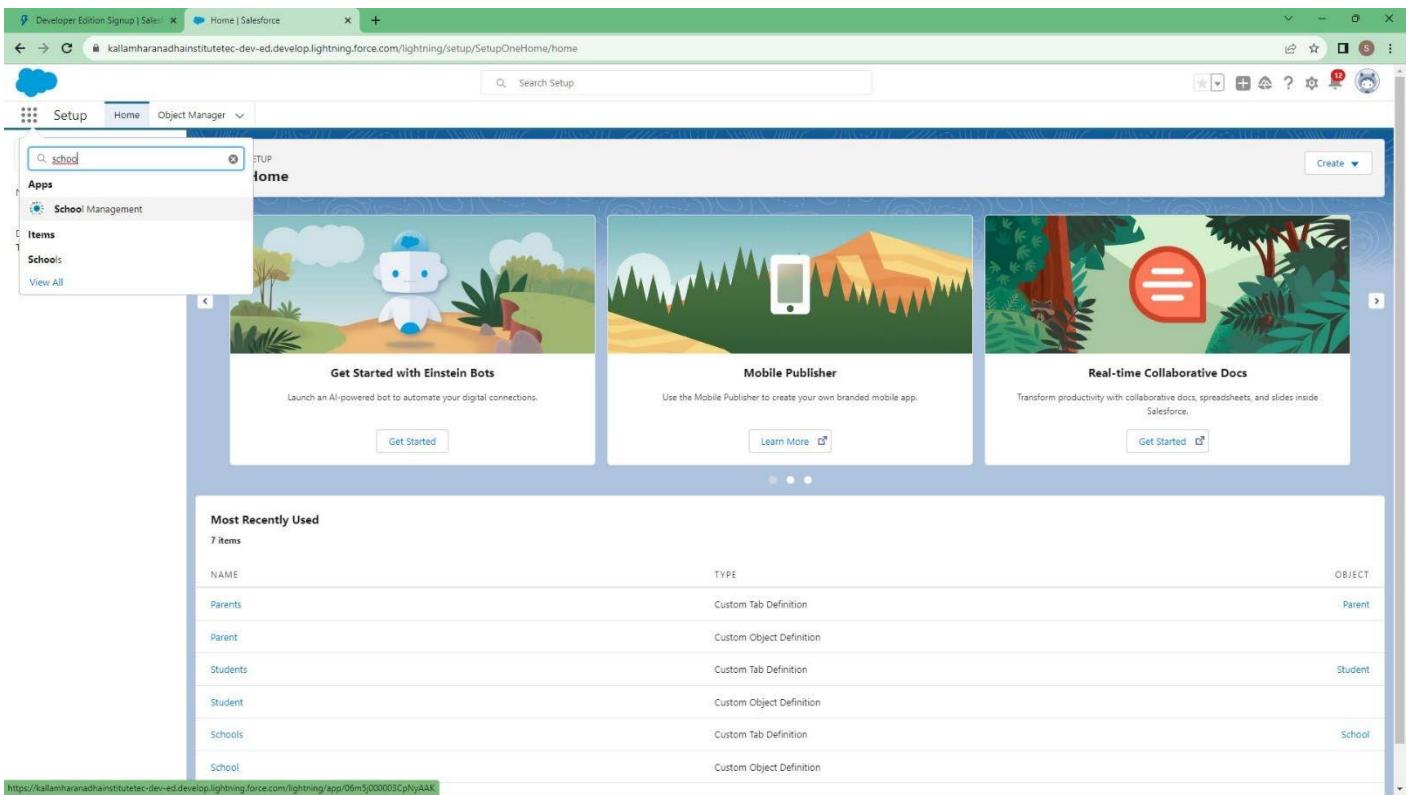
To verify your changes, click the App Launcher, type School Management and select the School Management app.

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.

Developer Edition Signup Sales Recently Viewed Schools Sales School Salesforce																																
Search 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	Fields & Relationships 4 items, Sorted by Field Label	<table border="1"> <thead> <tr> <th>FIELD LABEL</th> <th>FIELD NAME</th> <th>DATA TYPE</th> <th>CONTROLLING FIELD</th> <th>INDEXED</th> </tr> </thead> <tbody> <tr> <td>Created By</td> <td>CreatedById</td> <td>Lookup(User)</td> <td></td> <td></td> </tr> <tr> <td>Last Modified By</td> <td>LastModifiedById</td> <td>Lookup(User)</td> <td></td> <td></td> </tr> <tr> <td>Owner</td> <td>OwnerId</td> <td>Lookup(User,Group)</td> <td></td> <td>✓</td> </tr> <tr> <td>School Name</td> <td>Name</td> <td>Text(80)</td> <td></td> <td>✓</td> </tr> </tbody> </table>	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)		✓	<input type="button" value="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 > OBJECT MANAGER School

Help for this Page

Step 2 of 4

Previous Next Cancel

New Custom Field

Step 2. Enter the details

Field Label	Address
Field Name	Address
Description	
Help Text	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity
Default Value	Show Formula Editor
<small>Use formula syntax. Enclose text and picklist value API names in double quotes ("the_label"). Include numbers without quotes ("12"). Show percentages as decimals (0.12) and express date calculations in the standard format ("2012-01-01"). You can reference a field from a Custom Metadata type record using SCCustomMetadata.Type__not.RecordName.FieldName__c</small>	

Previous Next Cancel

SETUP > OBJECT MANAGER School

Help for this Page

Step 2 of 4

Previous Next Cancel

New Custom Field

Step 2. Enter the details

Field Label	District
Field Name	District
Description	
Help Text	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity
Default Value	Show Formula Editor
<small>Use formula syntax. Enclose text and picklist value API names in double quotes ("the_label"). Include numbers without quotes ("12"). Show percentages as decimals (0.12) and express date calculations in the standard format ("2012-01-01"). You can reference a field from a Custom Metadata type record using SCCustomMetadata.Type__not.RecordName.FieldName__c</small>	

Previous Next Cancel

SCHOOL

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
- Triggers
- Flow Triggers

New Custom Field

Step 2. Enter the details

Field Label: State

Field Name: State

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 entry

Default Value: Show Formula Editor

Use formula editor. Enclose text and positive value API names in double quotes ("Name"), include numbers without quotes (123), show percentages as decimal (.123), and express date calculations in the standard format: Today() + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata_Type__mdt.RecordAPIName.Field__c

Previous

SCHOOL

SETUP > OBJECT MANAGER

School

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
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- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers

New Custom Field

Step 2. Enter the details

Field Label: URL

Field Name: URL

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 entry

Default Value: Show Formula Editor

Use formula editor. Enclose text and positive value API names in double quotes ("Name"), include numbers without quotes (123), show percentages as decimal (.123), and express date calculations in the standard format: Today() + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata_Type__mdt.RecordAPIName.Field__c

Previous **Next**

Developer Edition Signup | Sales | Recently Viewed | Schools | Sales | School | Salesforce

Setup Home Object Manager

SCHOOL

SETUP > OBJECT MANAGER

School

Fields & Relationships

9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedBy	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedBy	Lookup(User)		
Phone Number	Phone_Number__c	Phone		
School	School__c	Master-Detail(Student)		✓
School Name	Name	Text(80)		✓
State	State__c	Text Area(255)		
URL	URL__c	URL(255)		

Creation Of Fields for The Student Objects

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

- Select the Phone as the Data Type, then click Next.

- For Field Label, enter Phone Number.
- 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

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

Let's create a Pick-List field:

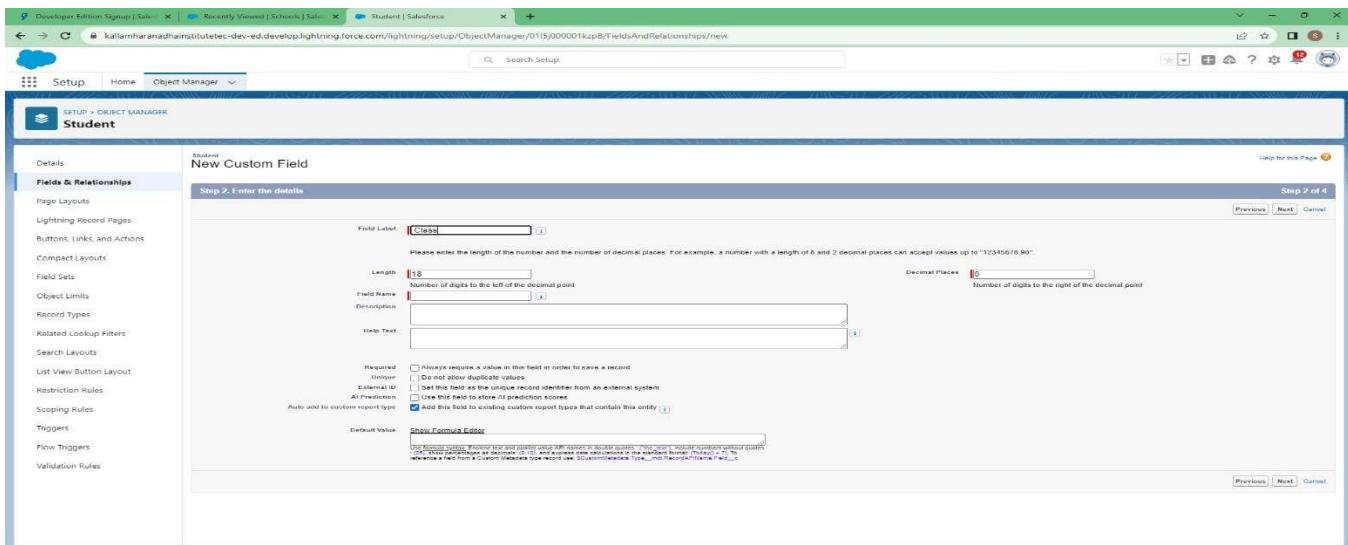
Note- Follow above steps 1 to 5 to create field and then follow below steps

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

Let's create a Number field:

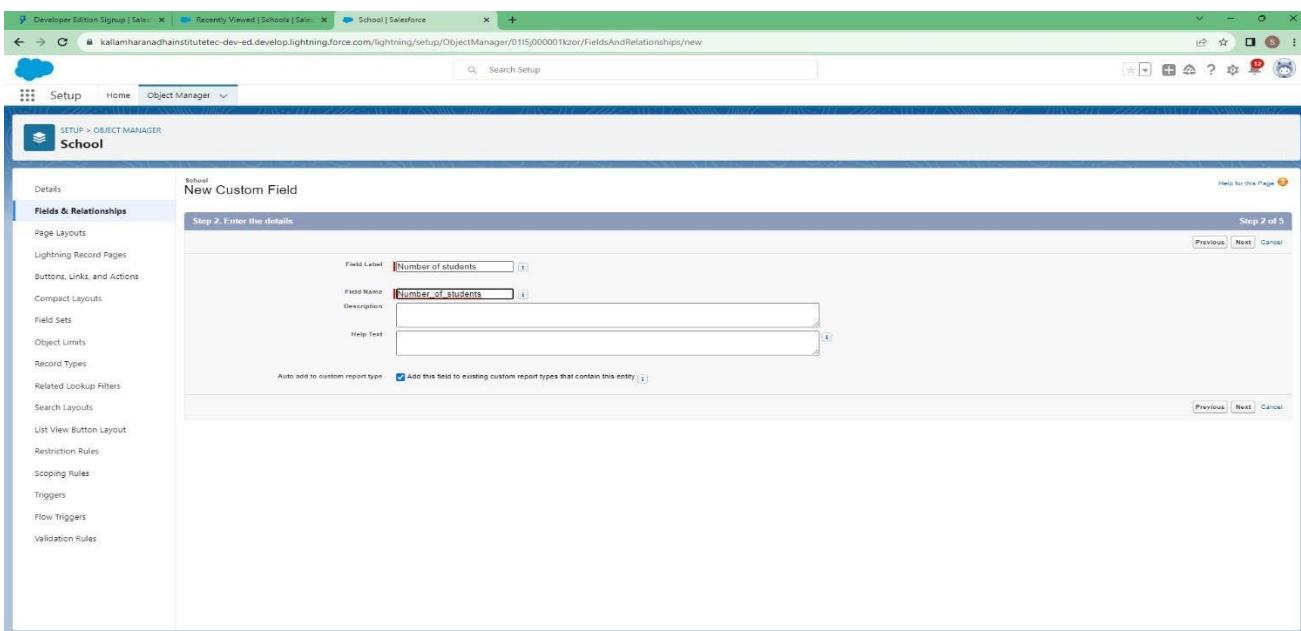
Note- Follow above steps 1 to 5 to create field and then follow below steps

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.



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.

School
New Custom Field
Step 2: Enter the details

Field Label: Highest Marks
Field Name: Highest_Marks
Description:
Help Text:
Auto add to custom report type Add this field to existing custom report types that contain this entity

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

Parent
New Custom Field
Step 2: Enter the details

Field Label: Parent_Address
Field Name: Parent_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 editor. Enclose text and picklist value API names in double quotes ("The_Text"), include numbers without quotes (12), show percentages as decimals (.10), and express date calculations in the standard format ('Today') + To reference a field from a Custom Metadata type record use @CustomMetadataType__r.Field__c

Parent
New Custom Field
Step 2: Enter the details

Field Label: Parent_Number
Field Name: Parent_Number
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 editor. Enclose text and picklist value API names in double quotes ("The_Text"), include numbers without quotes (12), show percentages as decimals (.10), and express date calculations in the standard format ('Today') + To reference a field from a Custom Metadata type record use @CustomMetadataType__r.Field__c

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 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

The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top right contains 'Search Setup'. The left sidebar has 'Users' expanded, with 'Profiles' selected. The main area is titled 'Profiles' and shows a table of profiles. The 'School Profile' is highlighted with a blue selection bar. The table columns include Action, Profile Name, User License, and Custom. The 'User License' column for the School Profile shows a checkmark in the 'View All' checkbox. The bottom of the table shows a total of 125 profiles and a 'Page 1 of 2' indicator.

The screenshot shows the 'Clone Profile' dialog box. It asks for the name of the new profile ('School Profile') and requires selecting an existing profile to clone from ('Standard User'). The 'Save' button is visible at the bottom.

The screenshot shows the 'Profiles' page with the 'Custom Object Permissions' section expanded. This section lists various objects like Ideas, Images, Incidents, Individuals, Invoices, and Leads, each with checkboxes for Read, Create, Edit, Delete, View All, and Modify All. Below this is the 'Session Settings' section, which includes 'Session Times Out After' (set to 2 hours of inactivity) and 'Session Security Level Required at Login' (set to None). At the bottom is the 'Password Policies' section, showing 'User passwords expire in' (set to 90 days).

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.

The screenshot displays two screenshots of the Salesforce Setup interface. The top screenshot shows the 'Users' page with a list of existing users, including their names, email addresses, and roles. The bottom screenshot shows the 'New User' creation dialog, where a new user named 'TEACHERS' is being created with the 'Salesforce' license and 'School Profile' profile.

Users Page Screenshot:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert		chatty.00d5000000chzcean.firebaseio@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	HEMANTH KUMAR_BANDI	BHEMA	hemanth@kht.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Integration	integ	integration@00d500000chzcean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	ses	insightssecurity@00d500000chzcean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Creation Dialog Screenshot:

User Edit		Save	Save & New	Cancel
General Information				
First Name	TEACHERS	Role	<None Specified>	
Last Name		User License	Salesforce	
Alias	teacher	Profile	School Profile	
Email	208x1a050@khitguntur.ac.in	Active	<input checked="" type="checkbox"/>	
Username	208x1a050@khitguntur.ac.in	Marketing User	<input type="checkbox"/>	
Nickname	User1692379503794303608	Offline User	<input type="checkbox"/>	
Title		Knowledge User	<input type="checkbox"/>	
Company		Flow User	<input type="checkbox"/>	
Department		Service Cloud User	<input type="checkbox"/>	
Division		Site.com Contributor User	<input type="checkbox"/>	
		Site.com Publisher User	<input type="checkbox"/>	
		WDC User	<input type="checkbox"/>	
		Data.com User Type	<None>	
		Data.com Monthly Addition Limit	Default Limit (300)	
		Accessibility Mode (Classic Only)	<input type="checkbox"/>	
		High-Contrast Palette on Charts	<input type="checkbox"/>	
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>	
		Debug Mode	<input type="checkbox"/>	
		Quick Access Menu	<input checked="" type="checkbox"/>	
Salesforce CRM Content User				
Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>			
Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>			
Allow Forecasting	<input type="checkbox"/>			
Call Center	<input type="checkbox"/>			
Phone	<input type="checkbox"/>			
Extension	<input type="checkbox"/>			

New User

User Edit General Information

First Name: PRINCIPALS
Last Name: PRINCIPALS
Alias: prin
Email: 208x1a5d0@khtguntur.ac.in
Username: 208x1a5d02@khtguntur.ac.in
Nickname: User1692379640848704230
Title:
Company:
Department:
Division:

Role: <None Specified>
User License: Salesforce
Profile: School Profile
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: None
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:
Quick Access Menu:
Salesforce CRM Content User:
Receive Salesforce CRM Content Email Alerts:
Receive Salesforce CRM Content Alerts as Daily Digest:
Allow Forecasting:
Call Center:
Phone:
Extension:

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

- From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- Click New.
- Give the name of the Permission set name as teacher permission.
- Under the object settings give the view create and edit permissions to all 3 custom objects (By click open the object)
- Click on manage assignment
- Click on add assignment.
- Click on Teacher (user), Next, Assign.

permission

SETUP Permission Sets

teacher_permission

Custom Code

Custom Permissions

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

API Name: teacher_permission
Namespace Prefix: PANDI HEMANTH KUMAR
Created By: PANDI HEMANTH KUMAR 18/08/2023, 10:59 pm

Apps

Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access
Flow Access
Named Credential Access
External Credential Principal Access
Custom Permissions
Custom Metadata Types
Custom Setting Definitions
Organization-Wide Email Address Access

The screenshot shows the 'PERMISSION SET > MANAGE ASSIGNMENT EXPIRATION' page for the 'teacher permission' set. The 'Selected Users' table lists one user, 'TEACHERS', with the following details:

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

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.

The screenshot shows the 'Permission Sets' page with a new permission set named 'Principal permission' being created. The 'Enter permission set information' section includes fields for Label ('Principal permission') and API Name ('Principal_permission'). The 'Select the type of users who will use this permission set' section contains a note about license requirements and a dropdown for 'License' set to 'None'.

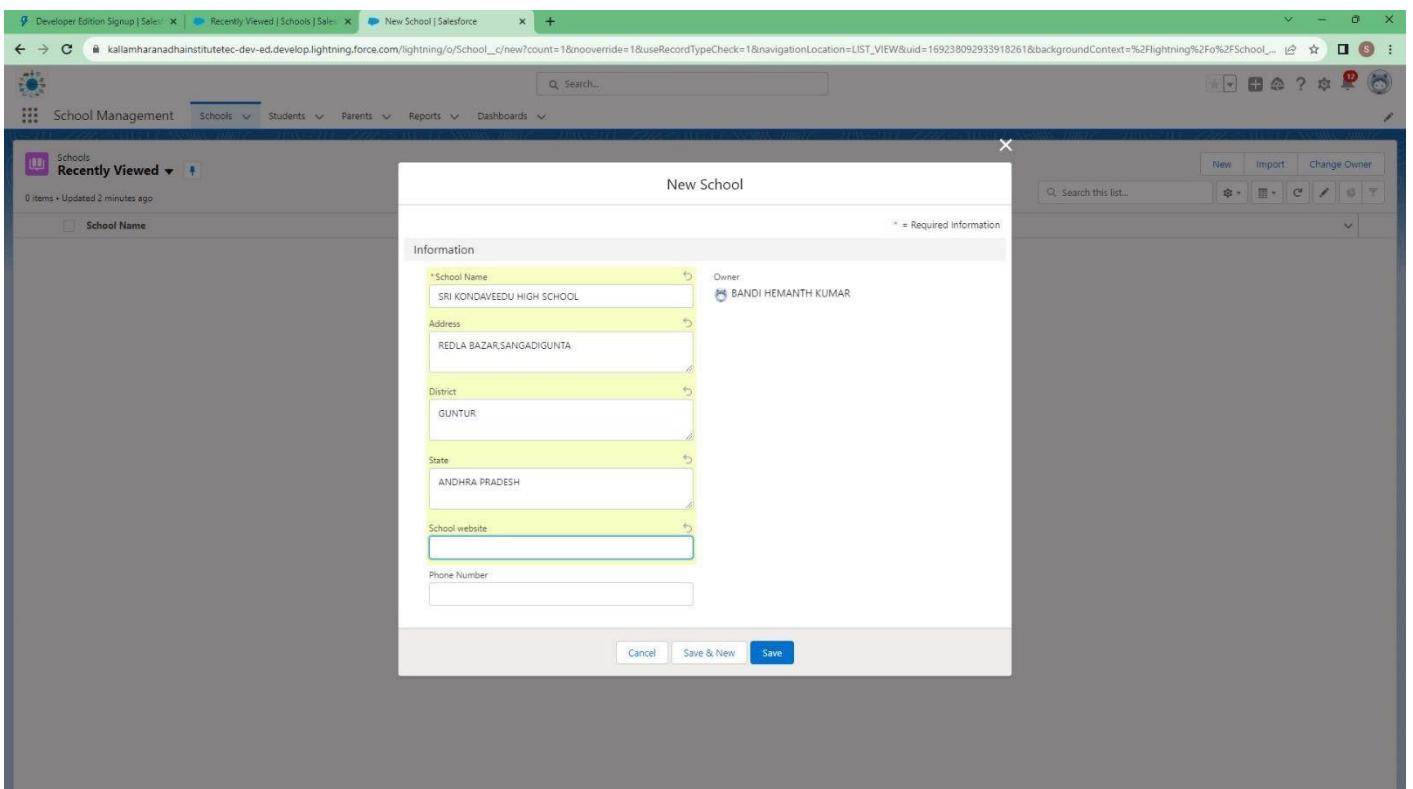
The screenshot shows the 'Principal permission' assignment confirmation page. A green banner at the top indicates '1 assignments were successful.' The 'Current Assignments' table shows one assignment for the user 'PRINCIPALS'.

Full Name	Active	Role	Profile	User License	Expires On
PRINCIPALS			School Profile	Salesforce	

User Adoption

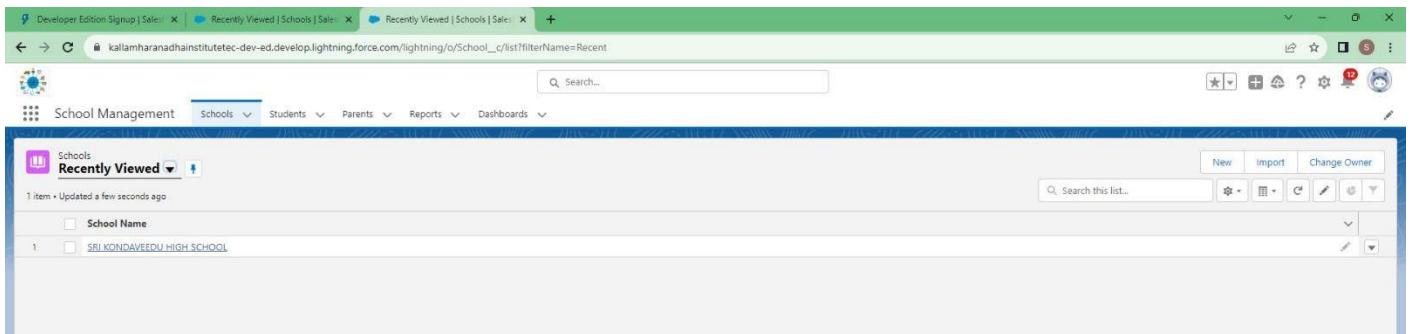
Create Record (School)

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.

The screenshot shows a Salesforce Lightning interface for managing schools. The top navigation bar has tabs for 'Developer Edition Signup | Sales', 'Recently Viewed | Schools | Sales', and 'Recently Viewed | Schools | Sales'. The main content area is titled 'Schools Recently Viewed' and shows a single item: 'SRI KONDAVEEDU HIGH SCHOOL'. A sidebar on the right provides options to 'Edit', 'Delete', or 'Change Owner' of the selected record. The interface is clean and modern, typical of the Salesforce mobile or desktop app.

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 sub report 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:

In School Management App click Reports tab.

1. Click New Report.
2. Select the report type as School with students and parents for the report.
3. Click start report.
4. Customize your report, then save and run
5. Give report name – Schools with Students Report
6. 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”).

Developer Edition Signup | Sales | Recently Viewed | Schools | Sales | Report Builder | Salesforce

kallamharanadhairstitutec-dev-ed.develop.lightning.force.com/one/one.app#eyJhb21wb25ibnREZWYIOlyZXBvcnRzOnJlcG9ydE1aWxkZXlCJhdHyaWJ1dGVzijp7nJy29yZEIkjoiIwibmV3UmVwb3J0QnVpbGRlcii6dH1ZX0slnN0YXRlljp7X0%3D

School Management Schools Students Parents Reports Dashboards

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
- File and Content Reports
- Individuals
- Other Reports
- Hidden Report Types

Select a Report Type

Report Type Name Category

Schools	Standard
Schools with Students	Standard

<https://kallamharanadhairstitutec-dev-ed.develop.lightning.force.com/reports/lightningReportApp.appt>

Developer Edition Signup | Sales | Recently Viewed | Schools | Sales | Report Builder | Salesforce

kallamharanadhairstitutec-dev-ed.develop.lightning.force.com/one/one.app#eyJhb21wb25ibnREZWYIOlyZXBvcnRzOnJlcG9ydE1aWxkZXlCJhdHyaWJ1dGVzijp7nJy29yZEIkjoiIwibmV3UmVwb3J0QnVpbGRlcii6dH1ZX0slnN0YXRlljp7X0%3D

School Management Schools Students Parents Reports Dashboards

REPORT New Schools with Students Report Schools with Students

Fields

Outline Filters

Groups

GROUP ROWS

Add group... School: School Name

GROUP COLUMNS

Add group... School: School Name

Previewing a limited number of records. Run the report to see everything.

School: School Name ↑ Student: Student Name ↑

No records returned. Try editing report filters.

Add Chart Save & Run Save Close Run

Update Preview Automatically

Developer Edition Signup | Sales | Recently Viewed | Schools | Sales | Report Builder | Salesforce

kallamharanadhairstitutec-dev-ed.develop.lightning.force.com/one/one.app#eyJhb21wb25ibnREZWYIOlyZXBvcnRzOnJlcG9ydE1aWxkZXlCJhdHyaWJ1dGVzijp7nJy29yZEIkjoiIwibmV3UmVwb3J0QnVpbGRlcii6dH1ZX0slnN0YXRlljp7X0%3D

School Management Schools Students Parents Reports Dashboards

REPORT New Schools with Students Report Schools with Students

Fields

Show Fields Filters

Groups

GROUP ROWS

Add group... School: School Name

GROUP COLUMNS

Add group... School: School Name

Columns

Add column... Student: Student Name

School ID

Previewing a limited number of records. Run the report to see everything.

School: School Name ↑ Student: Student Name ↑ School ID ↑

No records returned. Try editing report filters.

Save Report

Report Name Schools with Students Report

Report Unique Name Schools_with_Students_Report_Y8C

Report Description

Folder Private Reports Select Folder

Cancel Save

Row Counts Detail Rows Subtotals Grand Total

View Report

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

The screenshot shows the Salesforce Reports interface. The top navigation bar includes tabs for 'Developer Edition Signup | Sales', 'Recently Viewed | Schools | Sales', and 'Reports | Salesforce'. The main content area displays a table of reports under the 'Recent' tab. The table columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. One row is selected, showing 'Schools with Students Report' under 'Report Name', 'Private Reports' under 'Folder', 'BANDI HEMANTH KUMAR' under 'Created By', and '18/08/2023, 11:27 pm' under 'Created On'. The left sidebar shows categories like 'Reports', 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', and 'Folders'.

The screenshot shows the Salesforce School Management interface. The top navigation bar includes tabs for 'Developer Edition Signup | Sales', 'Recently Viewed | Schools | Sales', and 'SRI KONDAVEEDU HIGH SCHOOL'. The main content area displays a school record for 'SRI KONDAVEEDU HIGH SCHOOL'. The record includes fields for School Name, Address, District, State, School website, Phone Number, Number of students, Highest Marks, Owner (BANDI HEMANTH KUMAR), and creation/modification details (BANDI HEMANTH KUMAR, 18/08/2023, 11:21 pm).

The screenshot shows the Salesforce Reports interface. The top navigation bar includes tabs for 'Developer Edition Signup | Sales', 'Recently Viewed | Schools | Sales', and 'Reports | Salesforce'. The main content area displays a table of reports under the 'Recent' tab. One report, 'Schools with Students Report', is selected. A context menu is open over this report, showing options: Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

Advantages:

- Saves Time & Resources
- Improves Communication
- Better Efficiency
- Better Student Data Management
- Quick Access to Every Information
- Expense Management

Disadvantages:

- There are no such disadvantages of school management software but there are some issues that are commonly faced by users.
- The school management software does not have enough features to fulfill the school's requirements

There are countless advantages of the school management system, and one can't simply ignore these benefits to save a few bucks.

APPLICATIONS:

The application can be used by a variety of educational institutions, including:

- Schools and K-12 institutions
- Colleges and universities
- Online learning platforms
- Tutoring centers and coaching institutes
- Non-profit educational initiatives
- Training and development programs
- Vocational institutes
- Special education programs
- After-school programs
- Language schools

The application has the potential to revolutionize the way schools are run. By automating administrative tasks and improving communication, the application can help schools to provide a better educational experience for their students.

In the future, the application could be extended to include new features and functionality, such as:

- A mobile app for teachers and parents.
- A data analytics dashboard for administrators.
- Integration with other educational systems, such as learning management systems and student information systems.

Conclusion

- School management software provides a way for schools to track student progress and hold students, teachers, and administrators accountable for their performance.
- This helps to ensure that all stakeholders are committed to achieving academic success.
- In conclusion, school management software is an essential tool for educational institutions. It helps to streamline administrative tasks, improve communication, and enhance overall efficiency.
- By using school management software, schools can improve student outcomes and provide a better education for their students.

Future Scope

- The use of software for school management will ensure that schools in the future have streamlined processes in the apps with built-in features that allow for operational effectiveness, automatic upgrades and uniform compliance.
- Streaming of the process will include calibration that works for all departments and for all the users across the levels. This will ensure that redundant data entry work is eliminated along with any with unnecessary subsystems and processes that complicate administrative work in institutions
- Thus, for a successful school management software, it is essential that organisation consider a mobile app that can be easily accessed by students, teacher, parents and school staff alike.
- The application can be integrated with other systems, such as learning management systems and student information systems, to make it easier for students to learn and for teachers to manage their classes.
- The application can be used to collect data on student behavior and performance, which can then be used to improve teaching and learning.
- Gamification and rewards can be used to motivate students to learn and achieve their goals.
- Virtual reality and augmented reality can be used to create immersive learning experiences.
- Predictive analytics can be used to identify students who are at risk of failing and provide them with additional support.

THANK YOU