

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT - DEVELOPER - (SHORT-TERM)

Team ID : LTVIP2023TMID11564

Team Size : 4

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The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

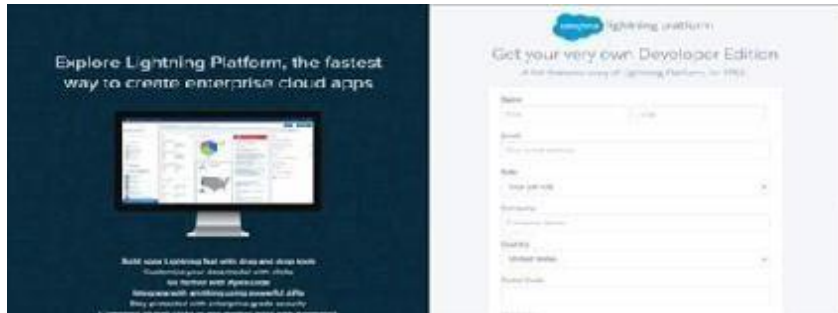
Introduction

1. Go to developer.salesforce.com
2. Click on sign up.
3. On the sign up form, enter the following details
 - a. First name & Last name
 - b. Email
 - c. Role - Developer
 - d. Company - College Name
 - e. Country - India
 - f. Postal Code - pin code

g. Username- should be a combination of your name and company

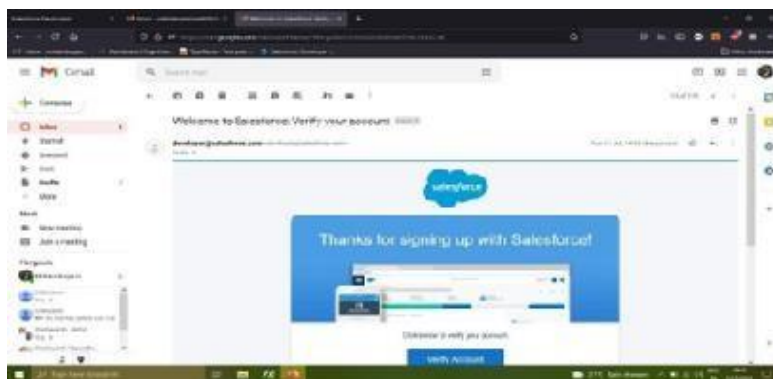
This need not be an actual email id, you can give anything in the format username@organization.com

Click on sign up after filling these.



Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as

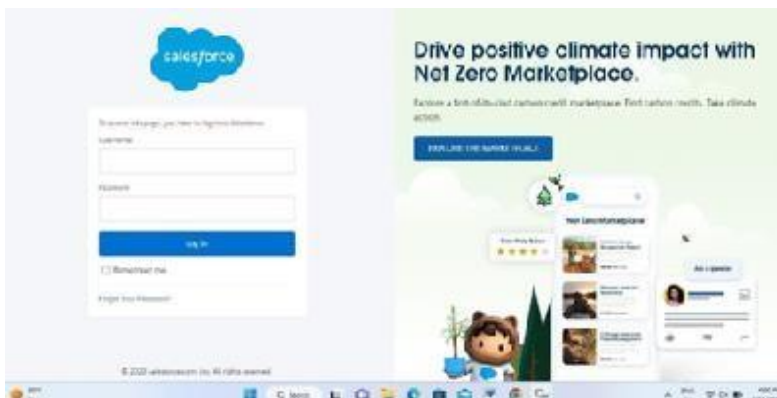


Login To Your Salesforce Account

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



Salesforce Login <https://login.salesforce.com>



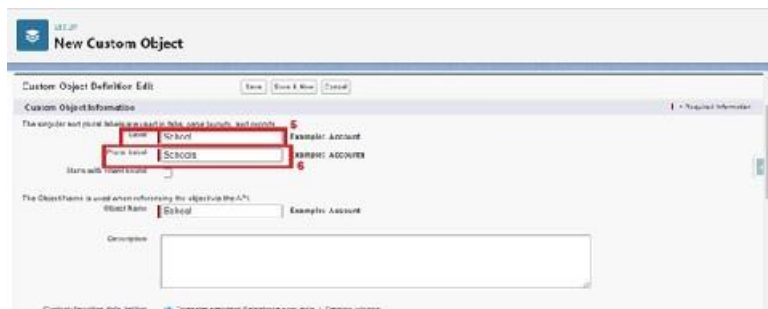
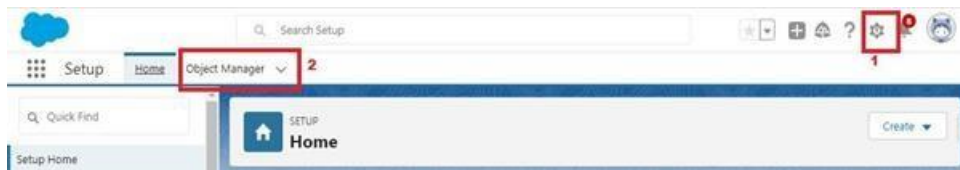
Object

Creation Of School Object Creation Of Objects For School Management

For this school management we need to create 3 objects School, Parents and Student. The below steps will assist you in creating those objects.

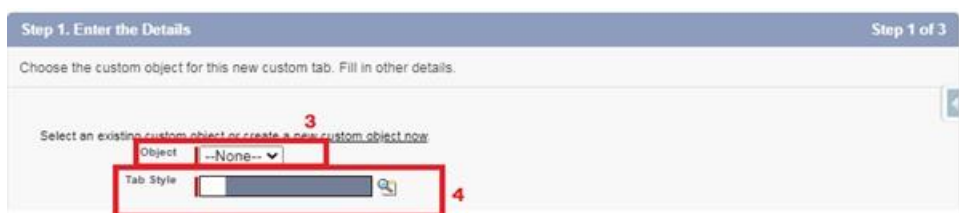
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: School
6. Plural Label: Schools
7. Record Name: School Name

8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



Now create a custom tab. Click the Home tab.





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

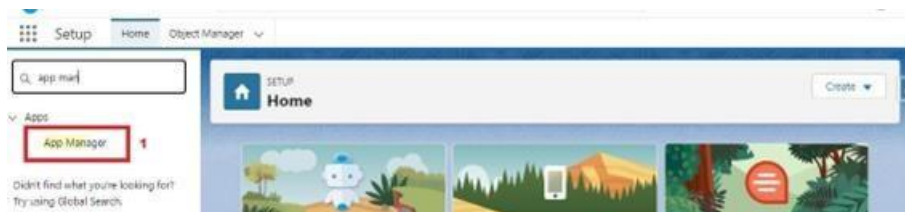
Click on the gear icon and then select Setup.

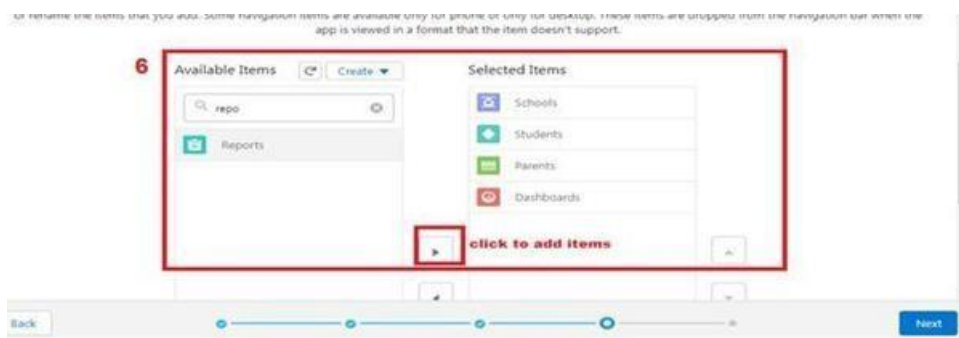
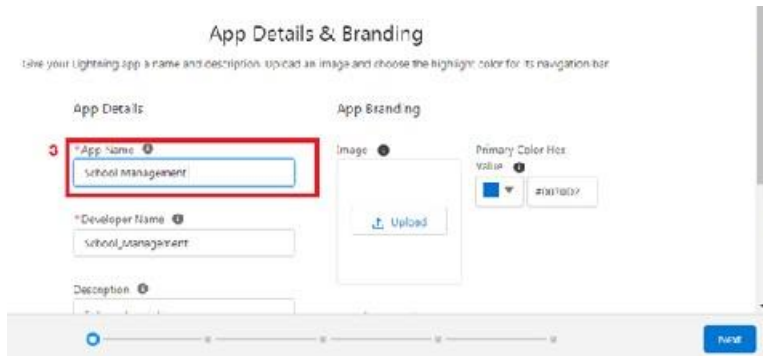
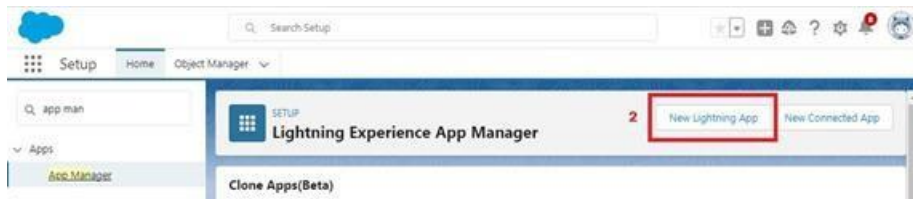
1. Click on the object manager tab just beside the home tab.
 2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:
 - Label: Parent
 - Plural Label: Parents
 - Record Name: Parent Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox
 - Click Save.

Lightning App

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.



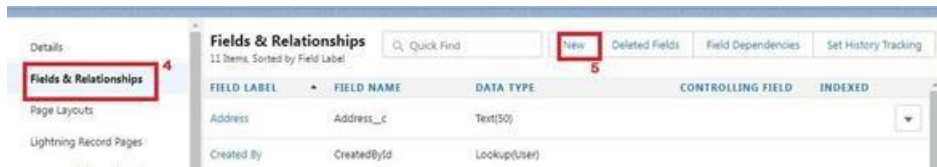


Fields And Relationship

Creation Of Fields For The School Objects

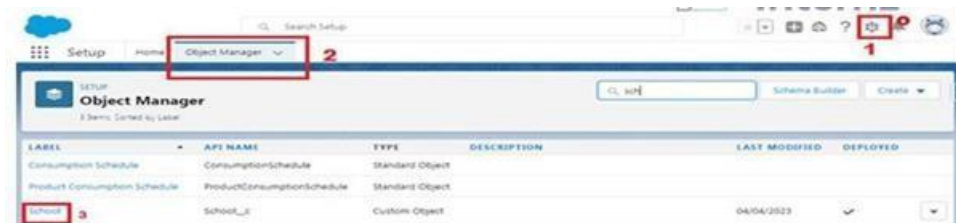
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text Area as the Data Type, click Next.
7. For Field Label, enter Address.
8. 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.





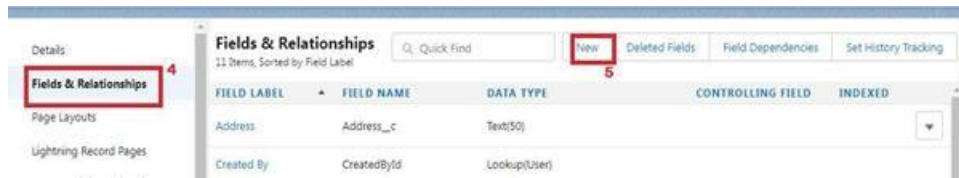
Creation Of Fields For The Student Objects

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New



Let's create a master-detail relationship with School object

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



Let's create a Pick-List field:

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

Let's create a Number field:

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

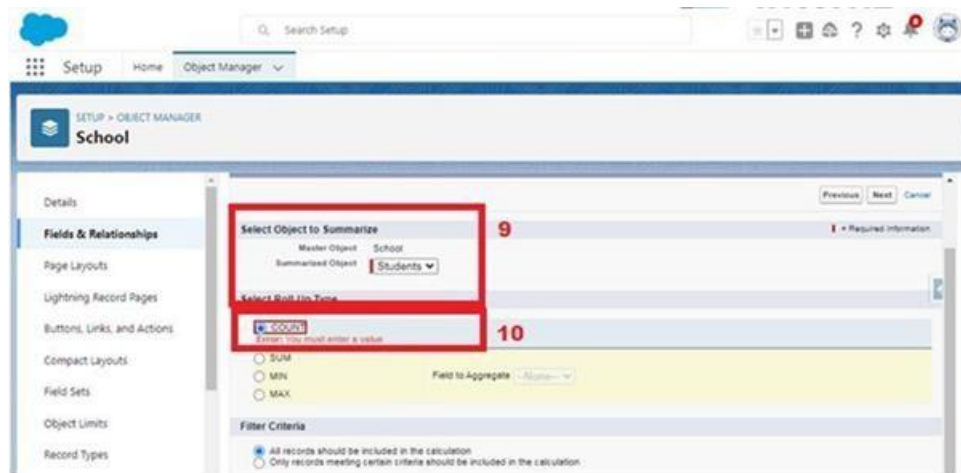
1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.



Let's create Roll-up summary fields on School Object to calculate the number of students

1. Click gear icon Select Setup, This launches Setup in a new tab.

2. click Object Manager
3. Select School.
4. Click Fields & Relationships
5. Click New.
6. Select the Roll-up summary field as data type
7. Enter the field label as Number of students
8. Click Next
9. Then select the master object summarized as students
10. Select count as roll-up and then click Next, Next and save.



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.

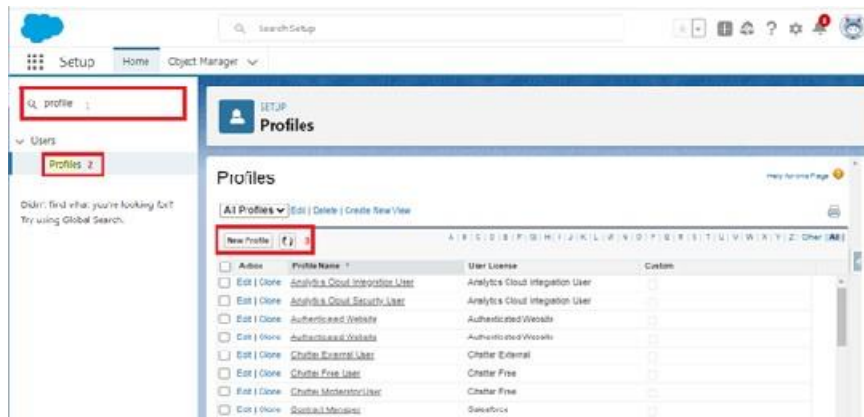
Creation Of Fields For The Parent Objects

- 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

Profile

Creation On Profile

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



Clone Profile

[Help for this Page](#)

Enter the name of the new profile.

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

Existing Profile:

User License:

Profile Name: 4

5

Custom Object Permissions 7

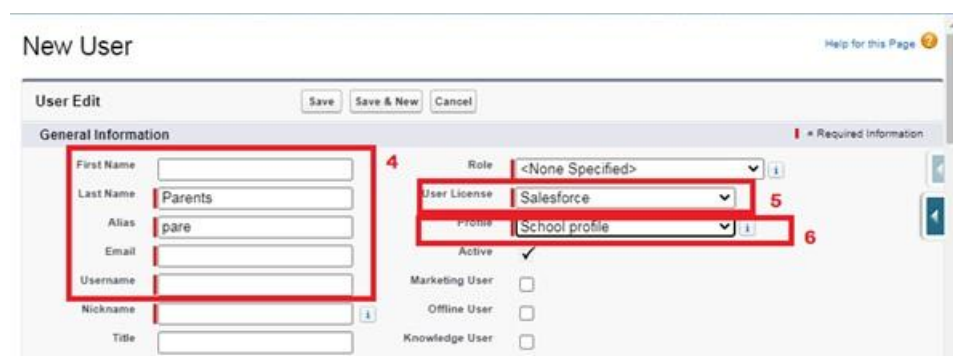
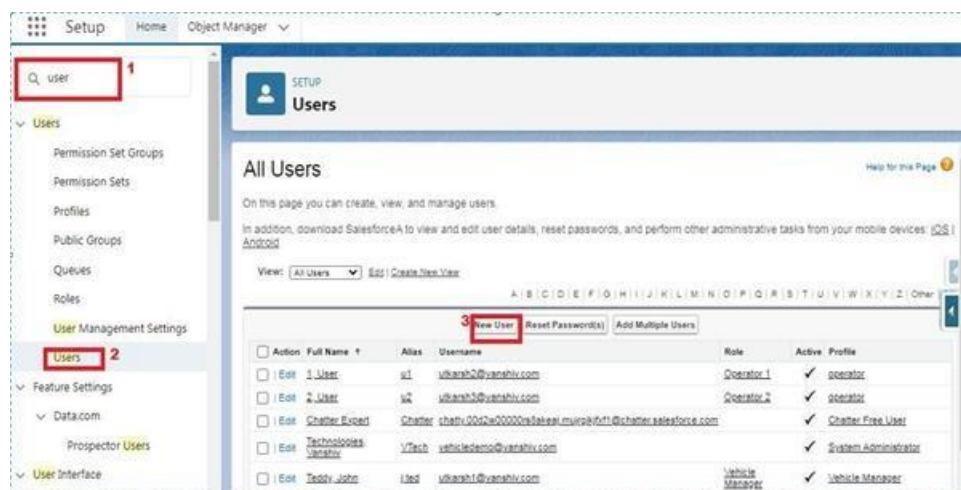
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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

Users

Creating A User

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

6. NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license or change the license type from Salesforce to any other.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
9. Similarly follow the above steps and create 2 users as Teachers and principals.



Permission Sets

Permission Sets 1

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

Q. permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

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

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see p...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or S...	CRM User

SETUP Permission Sets

Save Cancel

Enter permission set information

Label teacher permission

API Name teacher_permission

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License --None--

Save Cancel

SETUP Permission Sets

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	teacher_permission
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Varshu Technologies, 04/04/2023, 4:35 pm
Last Modified By	Varshu Technologies, 04/04/2023, 4:35 pm	

Apps

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

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

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

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

Apex Class Access
Permissions to execute Apex classes.

SETUP Permission Sets

Available Visible

☐ ☐

Object Permissions

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



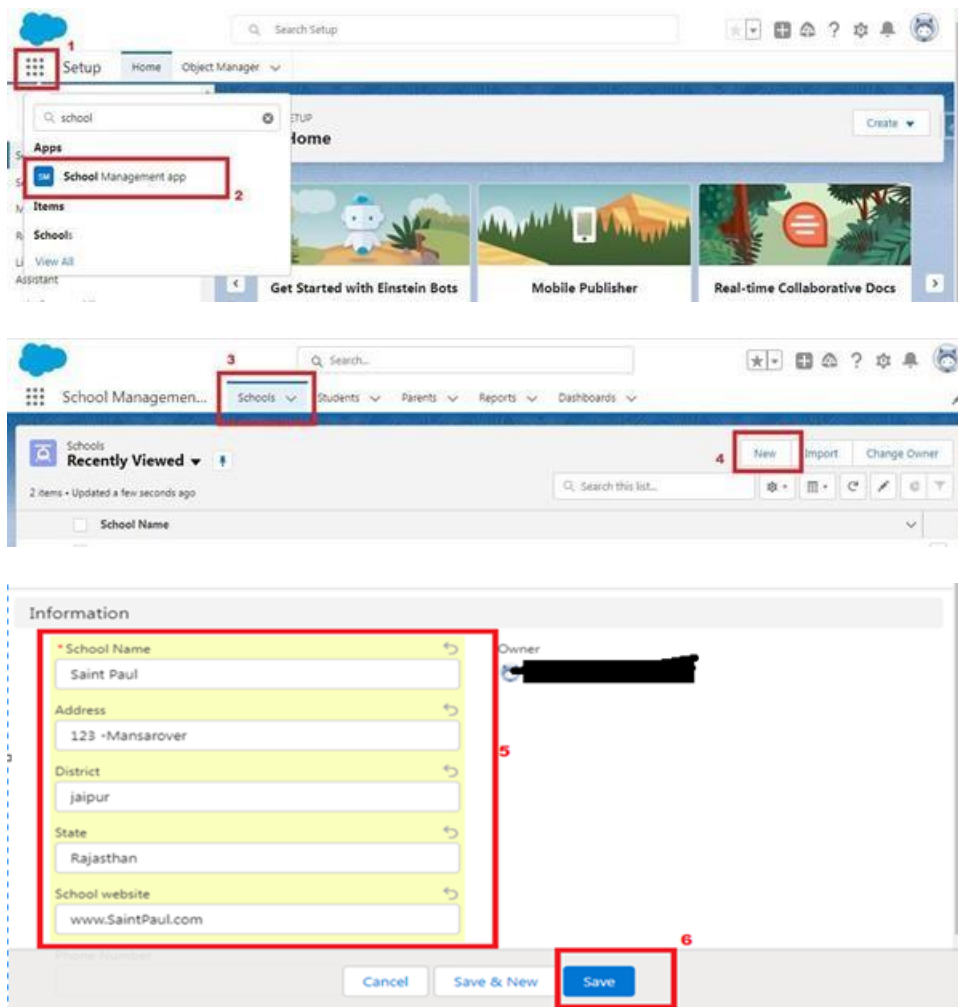
Permission Sets 2

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

User Adoption

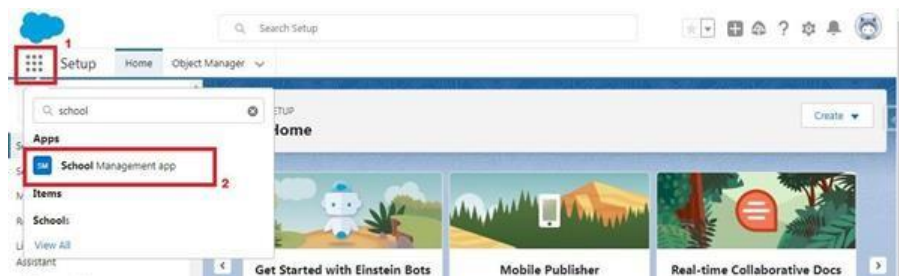
Create Record (School)

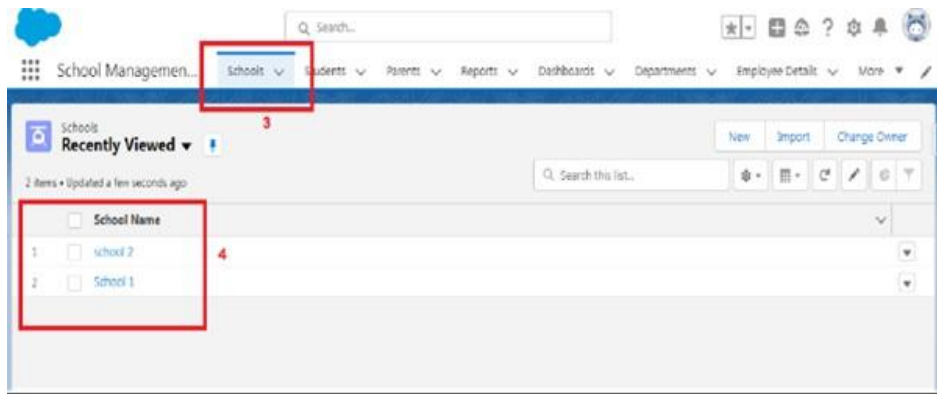
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools tab.
4. Click new button
5. Fill all School record details.
6. Click on Save Button



View Record (School)

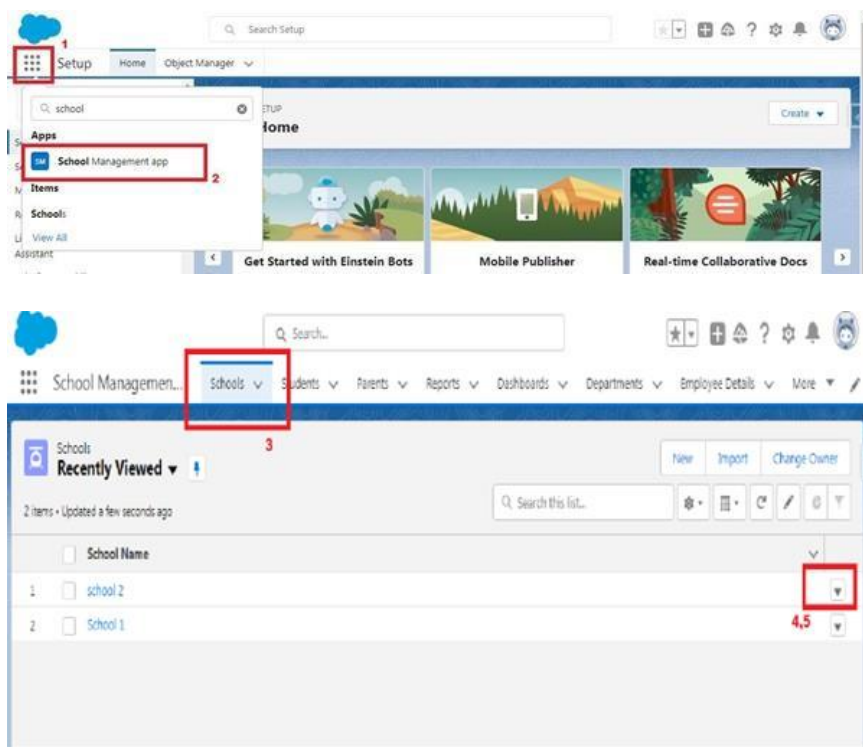
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on any record name. you can see the details of the School.





Delete Record (School)

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

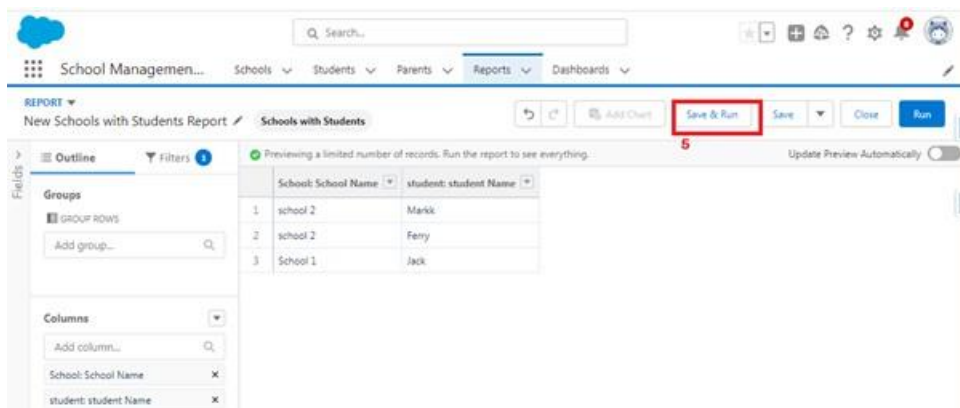
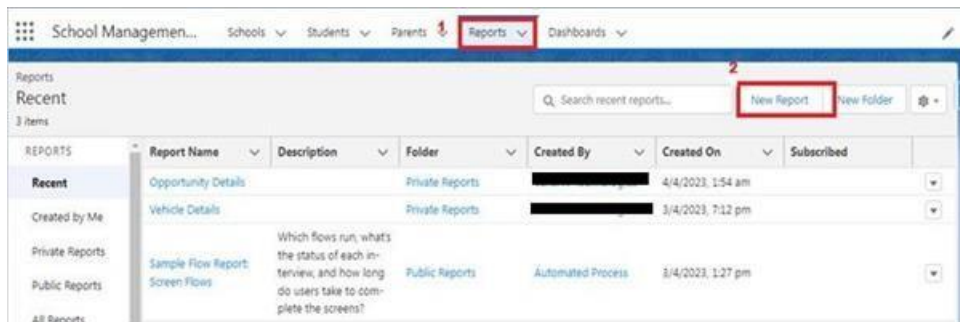


Reports

Create Report

Reports:

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



Save Report

* Report Name

Report Unique Name

Report Description

Cancel
Save

View Report

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

The screenshot shows the Salesforce interface with the following elements highlighted:

- 1:** App Launcher icon (grid of dots) in the top left.
- 2:** 'School Management app' in the search results under the 'Apps' section.
- 3:** 'Reports' tab in the top navigation bar.
- 4:** 'Schools with Students Report' in the 'Recent' reports list.

Report Name	Description	Folder	Created By	Created On	Subscribed
Schools with Students Report		Private Reports	Vanshiv Technologies	14/4/2023, 5:55 pm	
Property's with Customer Name Report		Private Reports	Vanshiv Technologies	8/4/2023, 12:48 pm	
Events with Attendees		Private Reports	Vanshiv Technologies	6/4/2023, 4:35 pm	
Candidate Internal Result Report		Private Reports	Vanshiv Technologies	9/4/2023, 7:57 pm	
job application with					

Triggers

Write A Trigger

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

Go to the gear icon and select the developer console.
From the menu bar click on file and select Apex class.
Now give the class name as schoolHandler
Now Write the below code

```
public class schoolHandler {  
    public static void beforeDelete(list<School_c> oldlist){  
        for(School_c s : oldlist){  
            if(s.Schoolwebsite_c == null ){  
                s.addError('you cannot delete the record');  
            }  
        }  
    }  
}
```

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

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

Flows

Create Flow

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

Click on Gear icon and select setup

In Quick find Box enter flow and select the flows

Click on New flow and Select Record triggered Flows.

The screenshot shows the Salesforce Setup interface. The 'Setup' tab is active, and the 'Flows' link under 'Process Automation' is highlighted. The 'New Flow' button is also highlighted. The 'Flow Definitions' section shows a list of flows, including 'Book Appointment from Invitation', 'Cancel Item Flow', 'Change Case Owner to Incident Owner', 'Close Change Request & Related Issues', 'Create a Case', 'Create Order Summary Flow', 'Create Process Exception Flow', 'Discount Flow', 'Even Exchange Flow', 'Generate Appointment Invitation', and 'Inbound Cancel Appointment'.

The 'New Flow' dialog box displays several flow templates. The 'Record-Triggered Flow' option is highlighted, indicating it is the selected template for creating a new flow.

Flow Type	Description
Screen Flow	Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
Record-Triggered Flow	Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Schedule-Triggered Flow	Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
Platform Event—Triggered Flow	Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger)	Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
Record-Triggered Orchestration	Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

In the search bar type student and click done.

Configure Start

Select Object

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

* Object

Search objects...

A value is required.

Configure Trigger

* Trigger the Flow When:

☒ A record is created

☐ A record is updated

☐ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Cancel Done

Select (+)

type action and type email as follows.

New Action

Filter By

Category

All

Users

Commerce

Group

Work Plans

Work Steps

Notifications

Sales leads

Action

email

Send Email

emailSimple-emailSimple

Lights, camera, action!

Select an action to configure.

Cancel Done

Enter the following details

Label:Student Record Creation

Api Name:Student_Record_Creation(Auto-populated)

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

Subject: Record Creation

Recipient email Address:{\$Record.Email__c}

New Action

Filter By
Category

Send Email

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

* Label

* API Name

Description

Set Input Values

A₀ * Body

Cancel Done

New Action

Notifications
Sales leads
Appointments
Task
Price books
+ Create HTTP Callout (Beta)

Set Input Values

A₀ * Body

A₀ Subject

A₀ Recipient Email Addresses (collection)

A₀ Recipient Email Addresses (comma-separated)

Rich Text-Formatted Body

Don't Include
Include

Cancel Done

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

Save the flow

* Flow Label

Flow API Name

Description

Show Advanced

Cancel Save