

# **SmartBridge – Salesforce Developer Externship**

## **Project Report: The School Management System using Salesforce**

### **1. INTRODUCTION**

#### **1.1 Overview**

The School Management System using Salesforce is a customized solution designed to streamline and enhance various aspects of a school's operations. It leverages the Salesforce platform to provide features such as student information management, attendance tracking, grade management, scheduling, and reporting. By integrating these functionalities within the Salesforce CRM, the system aims to optimize administrative processes, improve communication between staff and students, and enhance the overall learning experience.

#### **1.2 Purpose**

The purpose of this project is to develop a comprehensive and efficient School Management System using Salesforce. The system aims to address the challenges faced by schools in managing student data, attendance, grades, and scheduling, while also providing a platform for effective communication between school staff and students. The solution offers a centralized and easily accessible system for managing school operations, enabling administrators to make data-driven decisions and enhance productivity.

### **2. LITERATURE SURVEY**

#### **2.1 Existing problem**

In traditional school management systems, manual processes and disparate systems often lead to inefficiencies and inaccuracies in managing student data, attendance, and grades. Communication gaps between staff and students can hinder the learning experience and create administrative challenges. Existing solutions may lack integration, scalability, and flexibility, making it difficult to adapt to evolving needs.

#### **2.2 Proposed solution**

The proposed solution is a School Management System built on the Salesforce platform. By leveraging Salesforce's robust CRM capabilities, the system provides a unified platform for managing

student information, attendance, grades, scheduling, and reporting. It offers real-time data access, automation of manual processes, seamless communication channels, and customizable features to meet the specific requirements of schools.

### **3. THEORETICAL ANALYSIS**

#### **3.1 Hardware/Software designing**

Hardware requirements:

- Computer or server to host the Salesforce CRM
- Internet connectivity

Software requirements:

- Salesforce CRM
- Salesforce development tools
- Web browser

### **4. EXPERIMENTAL INVESTIGATIONS**

During the development of the School Management System, various investigations were conducted to ensure the effectiveness and usability of the solution. These investigations included:

- Analysis of school administrative processes and pain points
- Evaluation of existing Salesforce features and customization options
- Testing of data management, attendance tracking, grade management, and scheduling functionalities
- User feedback and usability testing sessions

### **5. RESULT**

The School Management System using Salesforce successfully provides a comprehensive solution for managing school operations. The system offers features such as student information management, grade management, and reporting, all integrated within the Salesforce CRM. The screenshots below demonstrate the interface and functionality of the system.

## Introduction:

- **Creating Developer Org:**

**Setup Home**

**Most Recently Used**

NAME	TYPE	OBJECT
Phone Number	Custom Field Definition	Student
Marks	Custom Field Definition	Student
Results	Custom Field Definition	Student
School	Custom Field Definition	Student
Class	Custom Field Definition	Student

**Company Information**

**Organization Detail**

Organization Name	VIT Bhopal	Primary Contact	Shivam Nandy	Division	IN	Address	Shivam Nandy	Phone	Fax
Fiscal Year Starts In	January	Activate Multiple Currencies	<input checked="" type="checkbox"/>	Default Locale	English (India)				
Enable Data Translation	<input checked="" type="checkbox"/>	Default Language	English						
Newsletter	<input checked="" type="checkbox"/>	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)						
Admin Newsletter	<input checked="" type="checkbox"/>	Improve DATE/VALUES accuracy for DST							
Hide Notices About System Maintenance	<input type="checkbox"/>	Currency Locale	English (India) - INR						
Hide Notices About System Downtime	<input type="checkbox"/>	Used Data Space	326 KB (0%) <small>[Details]</small>						

**User Licenses**

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	2	2	0	2023-06-30
External Apps Login	Active	20	0	20	
Salesforce Integration	Active	1	0	1	
Salesforce Platform	Active	3	0	3	
Custom Community Login	Active	5	0	5	
XOrg Proxy User	Active	2	0	2	
Work.com Only	Active	3	0	3	

## Object:

The screenshot shows the Salesforce Object Manager page. The table lists various objects with their API names, types, descriptions, last modified dates, and deployment status.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent_c	Custom Object		30/06/2023	✓
Student	Student_c	Custom Object		30/06/2023	✓
School	School_c	Custom Object		30/06/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			
Work Order	WorkOrder	Standard Object			

The screenshot shows the Salesforce Tabs page. It displays sections for Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs. Under Custom Object Tabs, there are three entries: Parents (Tab Style: People), Schools (Tab Style: Building), and Students (Tab Style: People).

- Creation Of School Object Creation of Objects for School Management:**

The screenshot shows the Salesforce Object Definition Edit page for the 'School' object. The page includes sections for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Validation Rules. The main area shows the 'Custom Object Definition Edit' and 'Custom Object Information' sections, where the object name 'School' is being defined. The 'Optional Features' section is also visible.

The screenshot shows the Salesforce Object Manager interface. A new object named 'Student' is being created. The 'Custom Object Definition Edit' screen displays various configuration options:

- Custom Object Information:** Tab Label is set to 'Student' and Tab Style is 'Standard'. The object name is 'Student'.
- Record Name:** Set to 'Student'.
- Contract Default Field Settings:** Shows 'Open the standard Salesforce.com Map & Training window' selected.
- Optional Features:** Includes 'Show Activities', 'Show Attached Documents', 'Show Chatter Groups', and 'Show Chatter News'.
- Object Categories:** Shows 'School' selected.
- Deployment Status:** Shows 'Development' selected.
- Search Status:** Shows 'None' selected.

The left sidebar lists various setup categories like Details, Buttons, Page Layouts, and Validation Rules.

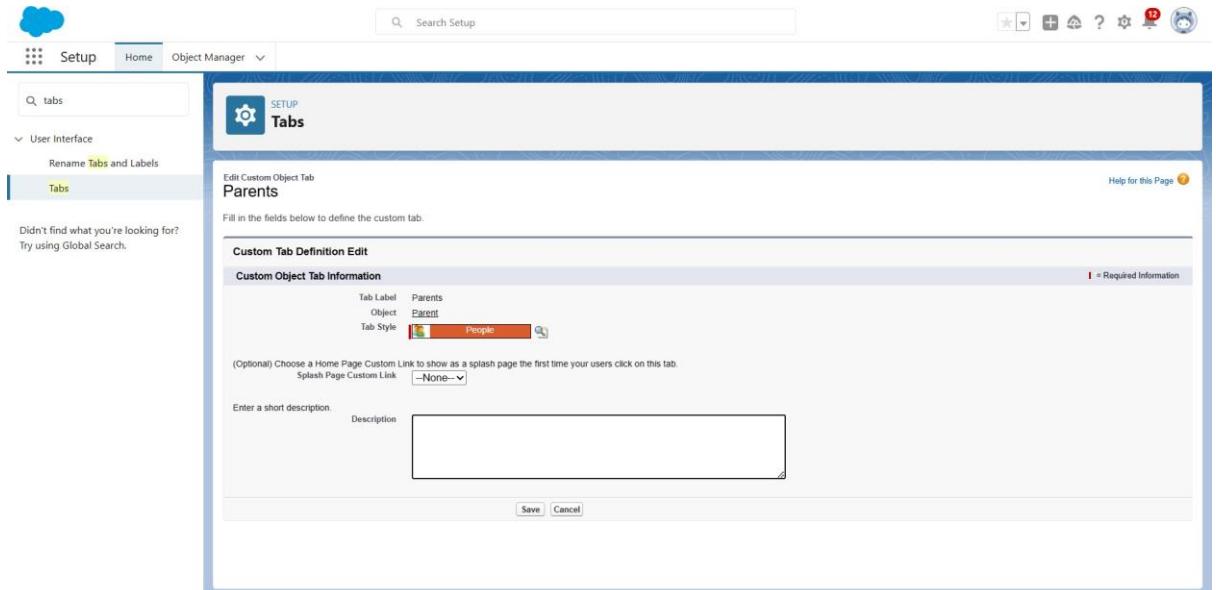
## • Create Student Object:

The screenshot shows the 'Tabs' setup page under 'User Interface'. A new tab named 'Students' is being created for the 'Student' object:

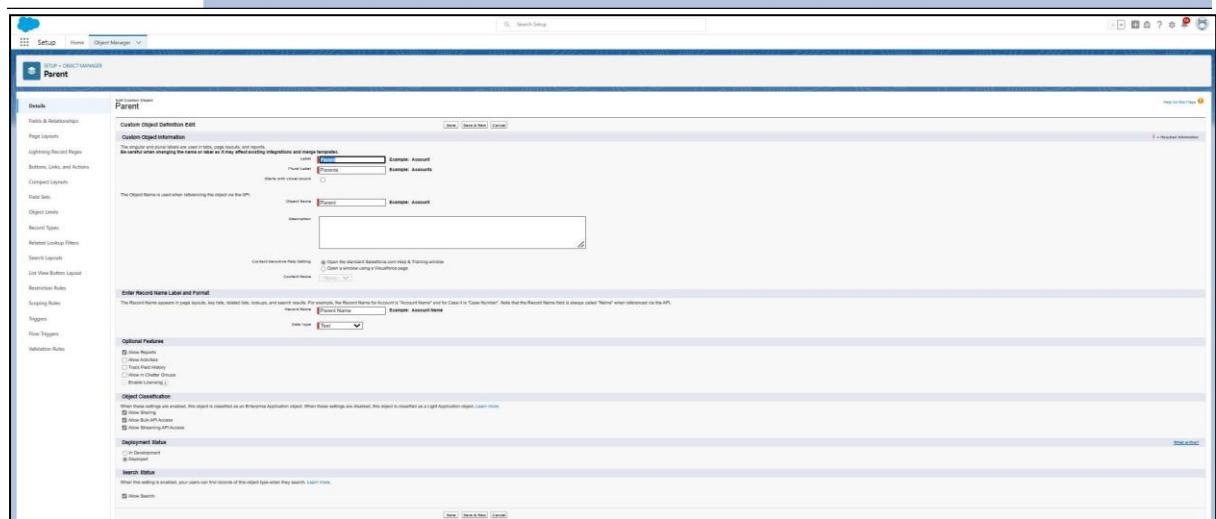
- Custom Tab Definition Edit:** Tab Label is 'Students', Object is 'Student', and Tab Style is 'Standard'.
- Custom Object Tab Information:** Shows 'Tab Label' as 'Students', 'Object' as 'Student', and 'Tab Style' as 'Standard'.
- Description:** An empty text area for entering a short description.
- Splash Page Custom Link:** Set to 'None'.

The left sidebar lists 'User Interface' components like 'Rename Tabs and Labels' and 'Tabs'.

- **Create Parent Object:**



The screenshot shows the 'Custom Tab Definition Edit' page for the 'Parent' object. The 'Tab Label' is set to 'Parents', 'Object' is 'Parent', and 'Tab Style' is 'People'. A note indicates that choosing a home page custom link will show a splash page. The 'Description' field is empty. Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot shows the 'Object Manager' details page for the 'Parent' object. It includes sections for 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Component Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookups Filters', 'Search Layouts', 'List View Button Layouts', 'Restriction Rules', 'Sharing Rules', 'Triggers', 'Flow Triggers', and 'Validation Rules'. The 'Object Name' is listed as 'Parent'.

## Lightning App:

- Create The School Management App:

The screenshot shows two related pages from the Salesforce Lightning Experience.

**Top Page: Lightning Experience App Manager**

This page lists all available apps in the system. The table includes columns for App Name, Developer Name, Description, Last Modified Date, Type, and Status. The "School Management" app is listed at the top.

App Name	Developer Name	Description	Last Modified...	Type	Status
School Management	School_Management	School Management	30/06/2023, 4:08 pm	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	30/06/2023, 3:14 pm	Lightning	✓
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	30/06/2023, 3:14 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	30/06/2023, 3:11 pm	Lightning	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	30/06/2023, 3:11 pm	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	30/06/2023, 3:11 pm	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	30/06/2023, 3:11 pm	Lightning	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer s...	30/06/2023, 3:11 pm	Lightning	✓
Content	Content	Salesforce CRM Content	30/06/2023, 3:11 pm	Classic	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	30/06/2023, 3:11 pm	Classic	✓
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, an...	30/06/2023, 3:11 pm	Classic	✓
Community	Community	Salesforce CRM Communities	30/06/2023, 3:11 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	30/06/2023, 3:11 pm	Classic	✓
Marketing	Marketing	Best-in-class on-demand marketing automation	30/06/2023, 3:11 pm	Classic	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more	30/06/2023, 3:11 pm	Classic	✓

**Bottom Page: Lightning App Builder - App Settings**

This page allows you to configure the details and branding for the "School Management" app.

**App Details & Branding**

Fields include:

- App Name:** School Management
- Developer Name:** School\_Management
- Description:** Enter a description...
- Image:** (Placeholder for the app icon)
- Primary Color Hex Value:** #007002
- Org Theme Options:** Use the app's image and color instead of the org's custom theme (checkbox)

**App Launcher Preview**

Shows a preview of the app icon (SM logo) and the app name "School Management".

Lightning App Builder | App Settings | Pages ▾ | School Management | ? Help

### App Settings

- App Details & Branding
- App Options**
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

App Options

Navigation and Form Factor !

\* Navigation Style
 Standard navigation
 Console navigation

\* Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization !

Setup Experience
 Setup (full set of Setup options)
 Service Setup

App Personalization Settings
 Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app

Lightning App Builder | App Settings | Pages ▾ | School Management | ? Help

### App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- User Profiles

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item Utility Bar Alignment Default ▾

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

Lightning App Builder | App Settings | Pages ▾ | School Management | ? Help

### App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items Create ▾

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

Selected Items

<span style="color: #0070C0;">■</span> Schools
<span style="color: #0070C0;">■</span> Students
<span style="color: #0070C0;">■</span> Parents
<span style="color: #0070C0;">■</span> Reports
<span style="color: #0070C0;">■</span> Dashboards

The screenshot shows the Lightning App Builder interface with the following details:

- Header:** Includes "Lightning App Builder", "App Settings", "Pages", and "School Management".
- Left Sidebar:** Labeled "App Settings" and contains sections for "App Details & Branding", "App Options", "Utility Items (Desktop Only)", and "Navigation Items". The "User Profiles" section is currently selected.
- User Profiles Section:**
  - Available Profiles:** A list of profiles including "Analytics Cloud Integration User", "Analytics Cloud Security User", "Authenticated Website", "Authenticated Website", "Contract Manager", "Custom Marketing Profile", "Custom: Sales Profile", "Custom: Support Profile", "Customer Community Login User", "Customer Community Plus Login User", "Customer Community Plus User", and "Customer Community User". A search bar at the top of this list says "Type to filter list...".
  - Selected Profiles:** A list containing "System Administrator".
- Bottom Left:** A small text area with the code "javascript:void(0);".
- Bottom Right:** A screenshot of the "School Management" application interface, showing the "Schools" tab selected. The "Recently Viewed" section lists "School Name" and "School-1".

## Fields And Relationship:

- Creation Of Fields for The School Objects:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User,Group)		✓
School Name	Name	Text(80)		✓
Schoolwebsite	Schoolwebsite__c	URL(255)		
State	State__c	Text Area(255)		

**Custom Field Definition Edit**

**Field Information**

- Field Label: Address
- Field Name: Address
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: -None-
- Data Sensitivity Level: -None-
- Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) and Chosen (empty)

**General Options**

- Required:  Always require a value in this field in order to save a record
- Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist values API names in double quotes. ('the\_text'), include numbers without quotes (25), show percentages as decimal (.10), and express date calculations in the standard format: (Today() + 7). To reference a field from another object, use the dot notation: (Opportunity.StageName). For more information, see [Formulas](#).

**Edit School Custom Field District**

**Custom Field Definition Edit**

**Field Information**

Field Label	District	Data Type	Text Area
Field Name	District	Description	
Help Text			
Data Owner	User	Data Usage	
Data Sensitivity Level	-None-	Compliance Categorization	
Available		Chosen	
PII	HIPAA	GDPR	PCI

**General Options**

Required  Always require a value in this field in order to save a record  
 Show Formula Editor

Default Value

Use formula syntax. Enclose text and picklist value API names in double quotes ("PII", "B2C"). Include numbers without quotes (123), show percentages as decimals (.10), and express date calculations in the standard format: Today() + 7. To reference a field from a Custom Metadata type record use \$CustomMetadataType\_\_r.name\$ or \$CustomMetadataType\_\_r.m\_\_r.Records\$!Name\$Field\$\_\_c

**Change Field Type** | **Save** | **Cancel**

**Edit School Custom Field State**

**Custom Field Definition Edit**

**Field Information**

Field Label	State	Data Type	Text Area
Field Name	State	Description	
Help Text			
Data Owner	User	Data Usage	
Data Sensitivity Level	-None-	Compliance Categorization	
Available		Chosen	
PII	HIPAA	GDPR	PCI

**General Options**

Required  Always require a value in this field in order to save a record  
 Show Formula Editor

Default Value

Use formula syntax. Enclose text and picklist value API names in double quotes ("PII", "B2C"). Include numbers without quotes (123), show percentages as decimals (.10), and express date calculations in the standard format: Today() + 7. To reference a field from a Custom Metadata type record use \$CustomMetadataType\_\_r.name\$ or \$CustomMetadataType\_\_r.m\_\_r.Records\$!Name\$Field\$\_\_c

**Change Field Type** | **Save** | **Cancel**

**Edit School Custom Field Schoolwebsite**

**Custom Field Definition Edit**

**Field Information**

Field Label	Schoolwebsite	Data Type	URL
Field Name	Schoolwebsite	Description	
Help Text			
Data Owner	User	Data Usage	
Data Sensitivity Level	-None-	Compliance Categorization	
Available		Chosen	
PII	HIPAA	GDPR	PCI

**General Options**

Required  Always require a value in this field in order to save a record  
 Show Formula Editor

Default Value

Use formula syntax. Enclose text and picklist value API names in double quotes ("PII", "B2C"). Include numbers without quotes (123), show percentages as decimals (.10), and express date calculations in the standard format: Today() + 7. To reference a field from a Custom Metadata type record use \$CustomMetadataType\_\_r.name\$ or \$CustomMetadataType\_\_r.m\_\_r.Records\$!Name\$Field\$\_\_c

**Change Field Type** | **Save** | **Cancel**

**Edit School Custom Field**

### Phone Number

**Custom Field Definition Edit**

**Field Information**

Field Label	Phone Number	Data Type	Phone
Field Name	Phone_Number	Description	
Help Text			
Data Owner	User	Field Usage	
Data Sensitivity Level	-None-	Compliance Categorization	
Available	PII HIPAA GDPR PCI	Chosen	

**General Options**

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

Default Value

Use formula syntax. Enclose text and picklist value API names in double quotes ("the\_Text"), include numbers without quotes (123), and use the standard date/time format (MM/DD/YYYY). To reference a field from another object, use \$ObjectType\_\_Field\_\_c or reference a field from a Custom Metadata type record using \$CustomMetadataType\_\_RecordName\_\_Field\_\_c

**Change Field Type** | **Save** | **Cancel**

**Edit School Custom Field**

### Number of students

**Custom Field Definition Edit**

**Field Information**

Field Label	Number of students	Data Type	Roll-Up Summary
Field Name	Number_of_students	Description	
Help Text			
Data Owner	User	Field Usage	
Data Sensitivity Level	-None-	Compliance Categorization	
Available	PII HIPAA GDPR PCI	Chosen	

**Roll-Up Summary Options**

Data Type: Roll-Up Summary

Calculation Options:

- Automatic calculation (Recommended)
- Force a mass recalculation of this field

**Change Field Type** | **Save** | **Cancel**

**Edit School Custom Field**

### Highest Marks

**Custom Field Definition Edit**

**Field Information**

Field Label	Highest Marks	Data Type	Roll-Up Summary
Field Name	Highest_Marks	Description	
Help Text			
Data Owner	User	Field Usage	
Data Sensitivity Level	-None-	Compliance Categorization	
Available	PII HIPAA GDPR PCI	Chosen	

**Roll-Up Summary Options**

Data Type: Roll-Up Summary

Calculation Options:

- Automatic calculation (Recommended)
- Force a mass recalculation of this field

**Change Field Type** | **Save** | **Cancel**

- Creation Of Fields For The Student Objects:

The screenshots illustrate the process of creating custom fields for the Student object in Salesforce.

**Screenshot 1: Fields & Relationships for Student Object**

This screenshot shows the "Fields & Relationships" section for the Student object. It lists standard fields like Class, Created By, Email, Last Modified By, Marks, Phone Number, Results, School, and Student Name, along with their field labels, data types, and controlling fields. The "School" field is a Master-Detail field related to the School object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks_c	Number(18, 0)		
Phone Number	Phone_Number_c	Phone		
Results	Results_c	Picklist		
School	School_c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

**Screenshot 2: Edit Student Custom Field - Phone Number**

This screenshot shows the "Edit Student Custom Field" page for the "Phone Number" field. The "Field Information" section includes the field label "Phone Number", field name "Phone\_Number", and data type "Phone". The "General Options" section includes a "Required" checkbox and a "Default Value" input field containing a formula. The "Compliance Categorization" section shows the field is categorized as "Chosen" under "PII", "HIPAA", "GDPR", and "PCI".

**Screenshot 3: Edit Student Custom Field - School**

This screenshot shows the "Edit Student Custom Field" page for the "School" field. The "Field Information" section includes the field label "School", field name "School", and data type "Master-Detail". The "Master-Detail Options" section specifies the "Related To" field as "School" and the "Child Relationship Name" as "Students". The "Sharing Setting" section includes checkboxes for "Read Only" and "ReadWrite". The "Lookup Filter" section allows for optional filtering of lookup records.

**Setup > Object Manager**

### Student

**Edit Student Custom Field Results**

**Custom Field Definition Edit**

**Field Information**

Field Label	Results	Data Type	Picklist
Field Name	Results		
Description			
Help Text			
Data Owner	User		
Field Usage	-None-		
Data Sensitivity Level	-None-		
Compliance Categorization	<div style="display: flex; align-items: center;"> <span>Available</span> <div style="margin: 0 10px;"> <input type="button" value="&lt;"/> <input type="button" value="&gt;"/> </div> <span>Chosen</span> </div> <ul style="list-style-type: none"> <li>PII</li> <li>HIPAA</li> <li>GDPR</li> <li>PCI</li> </ul>		

**General Options**

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

Default Value

**Picklist Options**

**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
- Validation Rules

**Details**

**Field Label** Class

**Field Name** Class

**Description**

**Help Text**

**Data Owner** User

**Field Usage** -None-

**Data Sensitivity Level** -None-

**Compliance Categorization**

**General Options**

Required  Always require a value in this field in order to save a record  
 Unique  
 External ID  
 Set this field as the unique record identifier from an external system  
 Use this field to store AI prediction scores

Default Value

**Number Options**

Length   
Decimal Places

**Student**

**Fields & Relationships**

**Marks**

**General Options**

- Required:
- Unique:
- External ID:
- AI Prediction:
- Default Value:

**Number Options**

- Length:
- Decimal Places:

**Email**

**Custom Field Definition Edit**

**Field Information**

**General Options**

- Required:
- Unique:
- External ID:
- AI Prediction:
- Default Value:

- **Creation Of Fields for The Parent Objects:**

**Parent**

**Fields & Relationships**

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

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > Object Manager**
- Object Manager** dropdown menu is open.
- Parent** object is selected.
- Fields & Relationships** tab is active.
- Custom Field Definition Edit** for the **Parent Address** field.
- Field Information** section:
  - Field Label:** Parent Address
  - Field Name:** Parent\_Address
  - Description:** (empty)
  - Data Type:** Text Area
  - Help Text:** (empty)
  - Data Owner:** User
  - Field Usage:** None
  - Data Sensitivity Level:** None
- Compliance Categorization** section:
  - Available:** PII, HIPAA, GDPR, PCI
  - Chosen:** (empty)
- General Options** section:
  - Required:**  Always require a value in this field in order to save a record
  - Default Value:** Show Formula Editor
- Notes:** Use formula syntax: Enclose text and picklist value API names in double quotes ("Name\_Label"), include numbers without quotes (10), and use the equals sign (=) to assign values to picklist items. The formula editor supports the \$RecordId variable to reference a field from a Custom Metadata type record use \$CustomMetadataType\_\_RecordId\$Name\$FieldId.
- Buttons:** Change Field Type, Save, Cancel.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup".
- Top Navigation:** "Setup" icon, "Home", "Object Manager".
- Breadcrumb:** "SETUP > OBJECT MANAGER".
- Section:** "Parent" under "Parent".
- Left Sidebar:** "Fields & Relationships" is selected. Other options include "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", and "Validation Rules".
- Form:** "Edit Parent Custom Field Parent Number".
  - Custom Field Definition Edit:** "Change Field Type" button, "Save" and "Cancel" buttons.
  - Field Information:**
    - Field Label: "Parent Number".
    - Field Name: "Parent\_Number".
    - Description: (empty).
    - Help Text: (empty).
    - Data Owner: "User".
    - Field Usage: "None".
    - Data Sensitivity Level: "None".
  - Compliance Categorization:** A list of categories: Available (PII, HIPAA, GDPR, PCI) and Chosen (empty). Buttons for moving items between lists.
  - General Options:**
    - Required:  "Always require a value in this field in order to save a record".
    - Default Value: "Show Formula Editor" button.
  - Formula Editor Help:** A small window explaining formula syntax.
- Right Sidebar:** "Help for this Page" button.

## Profile:

- Creation On Profile:

The image consists of two vertically stacked screenshots of the Salesforce Setup interface.

**Screenshot 1: Clone Profile**

This screenshot shows the "Clone Profile" screen under the "Profiles" section. A message at the top says "Didn't find what you're looking for? Try using Global Search." The main area has a heading "Clone Profile" and a sub-instruction "Enter the name of the new profile." Below this is a form with a dropdown "Existing Profile" set to "Standard User", a "User License" dropdown set to "Salesforce", and a "Profile Name" input field containing "School Profile". At the bottom are "Save" and "Cancel" buttons.

**Screenshot 2: Profile Edit - School Profile**

This screenshot shows the "Profile Edit" screen for the "School Profile". The top bar includes "Profile Edit", "School Profile", "Save", "Save & New", and "Cancel". The "Name" field is filled with "School Profile", "User License" is "Salesforce", and there is a "Description" field. To the right, a "Custom Profile" checkbox is checked. The main content area is titled "Custom App Settings" and contains two tables of application settings. The left table lists standard applications like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, and Marketing. The right table lists Sales, Sales Console, Salesforce Chatter, Salesforce Scheduler Setup, Sample Console, School Management, Service, Service Console, Site.com, and Subscription Management. Each row in the tables has "Visible" and "Default" columns with checkboxes.

Cloud icon

Setup Home Object Manager

Q prof

Users Profiles

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

SETUP Profiles

Invoices Leads Work Type Groups

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration
Parents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Schools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Students	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Save Save & New Cancel

Cloud icon

Setup Home Object Manager

Q prof

Users Profiles

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

SETUP Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	School Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

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

1-7 of 7 | 0 Selected | Page 1 of 1

## Users:

- **Creating A User:**

**Setup** Home Object Manager

Q user

**Users**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings**
- Users**
- Feature Settings
- Data.com
- Prospector Users
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions
- Global Actions
- Publisher Layouts
- Lightning App Builder

**SETUP** **Users**

Employee Number  Individual

**Mailing Address**

Street   
City   
Zip/Postal Code   
State/Province   
Country

**Single Sign On Information**

Federation ID

**Locale Settings**

Time Zone  (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale  English (India)  
Language  English

**Approver Settings**

Delegated Approver   
Manager   
Receive Approval Request Emails  Only if I am an approver  
 Generate new password and notify user immediately

**Buttons:** Save | Save & New | Cancel

**Setup** Home Object Manager

Q user

**Users**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings**
- Users**
- Feature Settings
- Data.com
- Prospector Users
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions
- Global Actions
- Publisher Layouts

**SETUP** **Users**

Help for this Page

**User Edit** Teachers

User Edit

General Information

First Name   
Last Name  Teachers  
Alias  teac  
Email  shivam.nandy@gmail.com  
Username  shivam.nandy@teachers.com  
Nickname  User1688131706896287717  
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   
WOC User   
Data.com User Type  -None-  
Data.com Monthly Addition Limit  300  
Accessibility Mode (Classic Only)   
High-Contrast Palette on Charts   
Load Lightning Pages While Scrolling   
Debug Mode   
Make Setup My Default Landing Page

**Buttons:** Save | Save & New | Cancel

**Setup** Home Object Manager

Q user

**Users**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings**
- Users**
- Feature Settings
- Data.com
- Prospector Users
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions
- Global Actions
- Publisher Layouts
- Lightning App Builder

**SETUP** **Users**

Employee Number  Individual

**Mailing Address**

Street   
City   
Zip/Postal Code   
State/Province   
Country

**Single Sign On Information**

Federation ID

**Locale Settings**

Time Zone  (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale  English (India)  
Language  English

**Approver Settings**

Delegated Approver   
Manager   
Receive Approval Request Emails  Only if I am an approver  
 Generate new password and notify user immediately

**Buttons:** Save | Save & New | Cancel

Setup Home Object Manager

Q user

**Users**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions
- Global Actions
- Publisher Layouts
- Lightning App Builder

SETUP Users

User Edit Principals

User Edit General Information

First Name: Principals  
Last Name: Principals  
Alias: prin  
Email: shivam.nandy@gmail.com  
Username: shivam.nandy@principals.co  
Nickname: User1688131796429300360  
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: 300  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:   
Load Lightning Pages While Scrolling:   
Debug Mode:   
Make Setup My Default Landing Page:

Help for this Page

Setup Home Object Manager

Q user

**Users**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions
- Global Actions
- Publisher Layouts
- Lightning App Builder

SETUP Users

Mailing Address

Employee Number:   
Individual:

Street:   
City:   
Zip/Postal Code:   
State/Province:   
Country:

Single Sign On Information

Federation ID:

Locale Settings

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English

Approver Settings

Delegated Approver:   
Manager:   
Receive Approval Request Emails: Only if I am an approver  
 Generate new password and notify user immediately

Save Save & New Cancel

## Permission Sets:

- **Permission Sets 1&2:**

The screenshot shows the 'Permission Sets' page in the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Data, Email), Platform Tools (Subscription Management, Apps, Feature Settings, Slack, MuleSoft, Einstein, Objects and Fields), and a Quick Find bar.

The main content area displays a table titled 'Permission Sets' with one entry:

Action	Permission Set Label	Description	License
<input type="checkbox"/>	<input type="checkbox"/> Del   Clone	Principal permission	

Below the table, there are navigation links for '1-1 of 1' and 'Page 1 of 1'. A help link 'Help for this Page' is also present.

The screenshot shows the 'Principal permission' detail page in the Salesforce Setup interface. The left sidebar is identical to the previous screenshot, with the 'Permission Sets' link under 'Administration' highlighted.

The main content area shows the 'Principal permission' record with the following details:

**Permission Set Overview**

- Description: Principal permission
- License: Not specified
- Session Activation Required:
- Last Modified By: Shivam Nandy, 30/06/2023, 7:03 pm
- API Name: Principal\_permission
- Namespace Prefix: Not specified
- Created By: Shivam Nandy

**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.

Visualforce Page Access: Permissions to execute Visualforce pages.

External Data Source Access: Permissions to authenticate against external data sources.

Flow Access: Permissions to execute Flows.

Named Credential Access: Permissions to authenticate against named credentials.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is titled 'Setup' and includes sections for Quick Find, Setup Home, Service Setup Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under 'Users', 'Permission Set Groups' and 'Permission Sets' are selected. The main content area is titled 'Principal permission' for the 'Schools' object. It shows 'Tab Settings' where 'Available' is checked and 'Visible' is unchecked. Under 'Object Permissions', 'Enabled' is checked for all permissions: Read, Create, Edit, Delete, View All, and Modify All. Under 'Field Permissions', there are two tables: one for 'Read Access' and one for 'Edit Access'. Both tables list fields such as Address, Created By, District, Higher Marks, Last Modified By, Number of students, Owner, Phone Number, School Name, Schoolwebsite, and State, with checkboxes indicating access levels.

This screenshot shows the same Salesforce Setup interface, but the 'Object Manager' dropdown in the top right is set to 'Students'. The main content area is titled 'Principal permission' for the 'Students' object. It shows 'Tab Settings' where 'Available' is checked and 'Visible' is checked. Under 'Object Permissions', 'Enabled' is checked for all permissions: Read, Create, Edit, Delete, View All, and Modify All. Under 'Field Permissions', there are two tables: one for 'Read Access' and one for 'Edit Access'. Both tables list fields such as Class, Created By, Email, Last Modified By, Marks, Phone Number, Results, School, and Student Name, with checkboxes indicating access levels.

**SETUP** Home Object Manager ▾

Q Quick Find Search Setup

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Data

PLATFORM TOOLS

Subscription Management Apps

**Permission Sets**

**Principal permission**

Find Settings | Clone | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings ▾ Parents ▾

**Parents**

Tab Settings

Available	Visible
[ ]	[ ]

**Object Permissions**

Permission Name	Enabled
Read	[ ]
Create	[ ]
Edit	[ ]
Delete	[ ]
View All	[ ]
Modify All	[ ]

**Field Permissions**

Field Name	Read Access	Edit Access
Created By	[ ]	[ ]
Last Modified By	[ ]	[ ]
Owner	[ ]	[ ]
Parent Address	[ ]	[ ]
Parent Name	[ ]	[ ]
Parent Number	[ ]	[ ]

Video Tutorial | Help for this Page

**SETUP** Home Object Manager ▾

Q Quick Find Search Setup

Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Data

PLATFORM TOOLS

Subscription Management Apps

**Current Assignments**

> SETUP > PERMISSION SET PRINCIPAL PERMISSION

**Principal permission**

Full Name	Active	Role	Profile	User License	Expires On
Principals	[ ]		School Profile	Salesforce	

Add Assignment

## User Adoption:

- Create Record (School):

The screenshot displays two windows of a School Management application.

**New School Window:**

- Information Section:**
  - School Name: Saint Paul
  - Address: 123, Mansarovar
  - District: Jaipur
  - State: Rajasthan
  - Schoolwebsite: www.SaintPaul.com
  - Phone Number: 9999999999
- Owner:** Shivam Nandy
- Buttons:** Cancel, Save & New, Save

**School Details Window:**

- School Name:** Saint Paul
- Address:** 123, Mansarovar
- District:** Jaipur
- State:** Rajasthan
- Schoolwebsite:** www.SaintPaul.com
- Number of students:** 0
- Highest Marks:** (Empty)
- Phone Number:** 9999999999
- Created By:** Shivam Nandy, 30/06/2023, 10:54 pm
- Last Modified By:** Shivam Nandy, 30/06/2023, 10:54 pm

**Top Navigation Bar:** School Management, Schools, Students, Parents, Reports, Dashboards.

- **View Record (School):**

The screenshot shows a web-based school management system. At the top, there's a navigation bar with icons for Home, School Management, Schools, Students, Parents, Reports, and Dashboards. A search bar is located at the top right. Below the navigation is a toolbar with buttons for New, Import, Change Owner, and Printable View. The main content area displays a list titled "Schools All". It shows two items: "Saint Paul" and "School-1", both listed under the "School Name" column. The list includes checkboxes for each item. At the bottom of the list, there are dropdown menus for sorting and filtering.

School Name
1 Saint Paul
2 School-1

- **Delete Record (School):**

The image displays two identical screenshots of a "School Management" application interface. Both screens show a list of schools under the "Schools" tab, with the filter set to "All". The top screenshot shows two items: "Saint Paul" and "School-1". The bottom screenshot shows only "School-1". In both cases, the list is sorted by "School Name" in ascending order. The interface includes a header with navigation links for Schools, Students, Parents, Reports, and Dashboards. Below the header is a search bar and a toolbar with various icons. On the right side of each list view, there is a context menu with options: "Edit", "Delete", and "Change Owner". The "Delete" option is highlighted in the top screenshot's menu.

## Reports:

- Create Report:

The screenshot shows the 'Create Report' dialog box. On the left, a sidebar lists categories like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', etc. In the center, a search bar finds 'sch'. Below it, a table shows 'Report Type Name' (Schools) and 'Category' (Standard). To the right, a 'Details' panel shows 'Schools with Students' (Standard Report type), a 'Start Report' button, and sections for 'Created By You' (Schools with Students Report), 'Created By Others' (No Reports Yet), and 'Objects Used in Report Type' (Student).

Report Type Name	Category
Schools	Standard
Schools with Students	Standard

**Details**

**Schools with Students**  
Standard Report type

**Start Report**

**Created By You**  
Schools with Students Report

**Created By Others**  
No Reports Yet

**Objects Used in Report Type**  
Student

The screenshot shows the report preview interface. It has tabs for 'REPORT' (selected), 'Outline' (highlighted), and 'Filters'. The preview area shows a single record: 'School: School Name' (School-1) and 'Student: Student Name' (abc xyz). The left sidebar shows 'Groups' and 'Columns' sections.

**REPORT** Schools with Students Report Schools with Students

**Outline**

**Groups**

**Columns**

School: School Name	Student: Student Name
School-1	abc xyz

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

Update Preview Automatically

- **Create Report:**

The screenshot displays two views of the School Management software interface.

**Top View (Reports Section):**

- The top navigation bar includes icons for Schools, Students, Parents, Reports, and Dashboards.
- The Reports section shows a table with one item: "Schools with Students Report".
- Table columns include: Report Name, Description, Folder, Created By, Created On, and Subscribed.
- Details for the report: Report Name - Schools with Students Report, Description - Private Reports, Created By - Shivam Nandy, Created On - 30/6/2023, 7:31 pm.
- Left sidebar categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites).

**Bottom View (Report Detail View):**

- The title is "Report: Schools with Students Schools with Students Report".
- Total Records: 1
- Filter options: School: School Name, Student: Student Name.
- Data table:
 

School: School Name	Student: Student Name
School-1	abc xyz
- Toolbar buttons: Enable Field Editing, Add Chart, Edit, etc.

## Triggers:

- Write A Trigger:

The image shows two screenshots illustrating the creation and inspection of an Apex trigger.

**Salesforce Setup - Apex Classes Page:**

- The left sidebar shows a search bar with "apex" and a tree view with "Custom Code" expanded, showing "Apex Classes".
- The main area is titled "Apex Classes" with a sub-section "Dynamic Apex Classes".
- A message box indicates "Percent of Apex Used: 0.01%" and "You are currently using 454 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization."
- A table lists one Apex class: "schoolHandler" (Action: Edit | Del | Security, Namespace Prefix: schoolHandler, API Version: 58.0, Status: Active, Size Without Comments: 273, Last Modified By: Shivam Nandy, 30/06/2023, 8:04 pm).
- The "View" dropdown is set to "All".

**Developer Console - Personal - Microsoft Edge:**

- The browser title is "Developer Console - Personal - Microsoft Edge".
- The URL is "https://vitbhopal-b3-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage".
- The tab is "schoolHandler.apxc".
- The code editor shows the following Apex code:

```
1 public class schoolHandler {  
2     public static void beforeDelete(list<School__c> oldlist){  
3         for(School__c s : oldlist){  
4             if(s.Schoolwebsite__c == null ){  
5                 saddError('you cannot delete the record');  
6             }  
7         }  
8     }  
9 }
```
- The "Logs" tab is selected.
- The logs table has columns: User, Application, Operation, Time, Status, Read, and Size. It shows one entry: "User" (Shivam Nandy), "Application" (schoolHandler), "Operation" (beforeDelete), "Time" (30/06/2023, 8:04 pm), "Status" (Success), "Read" (Yes), and "Size" (273).
- The "Logs" table has a "Filter" input field at the bottom.

The screenshot shows the Salesforce Setup interface under the 'Apex' category. The left sidebar lists 'Apex Exception Email', 'Custom Code' (with 'Apex Classes', 'Apex Settings', 'Apex Test Execution', 'Apex Test History', and 'Apex Triggers' selected), and 'Environments' (with 'Jobs' containing 'Apex Flex Queue' and 'Apex Jobs'). The main content area is titled 'Apex Triggers' and displays a message about Apex usage. A table lists the single trigger defined:

Action	Name	Namespace Prefix	sObject Type	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit   Del	SchoolTrigger		School	58.0	Active	161	Shivam Nandy, 30/06/2023, 8:08 pm	

The screenshot shows the Salesforce Developer Console in Microsoft Edge. The URL is https://vitbhopal-b3-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage. The tabs at the top include File, Edit, Debug, Test, Workspace, Help, and several dropdowns. The active tab is 'schoolHandler.apxc' (highlighted in orange). The code editor shows the following Apex trigger:

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

The developer console also includes a logs tab, a log viewer with columns for User, Application, Operation, Time, Status, Read, and Size, and a filter input field.

## Flows:

- Create Flow:

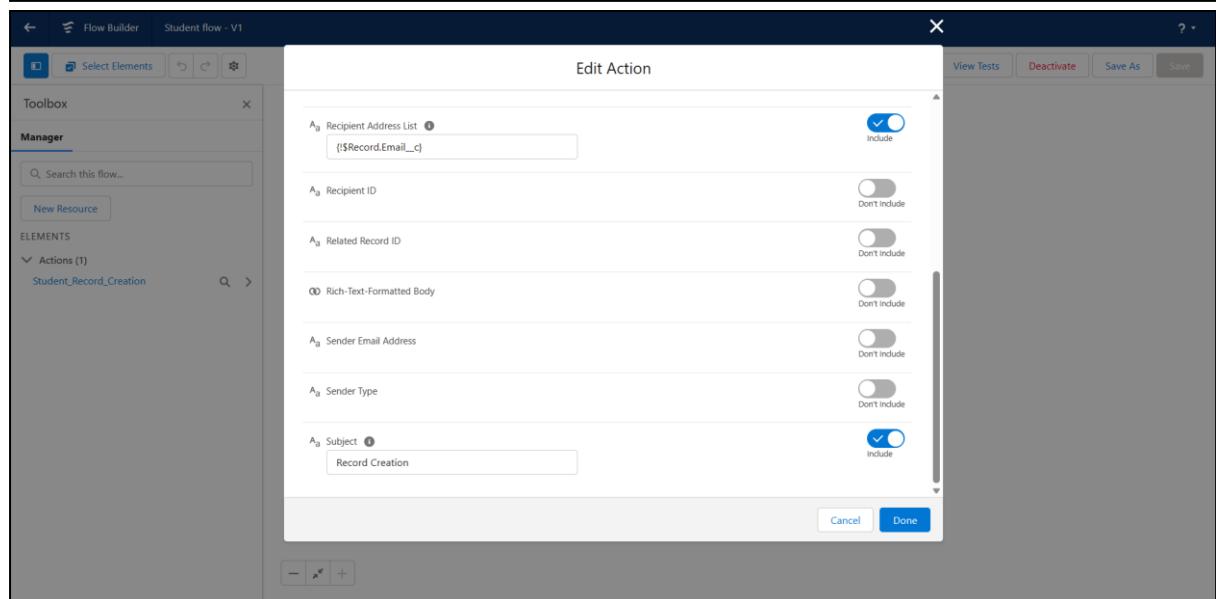
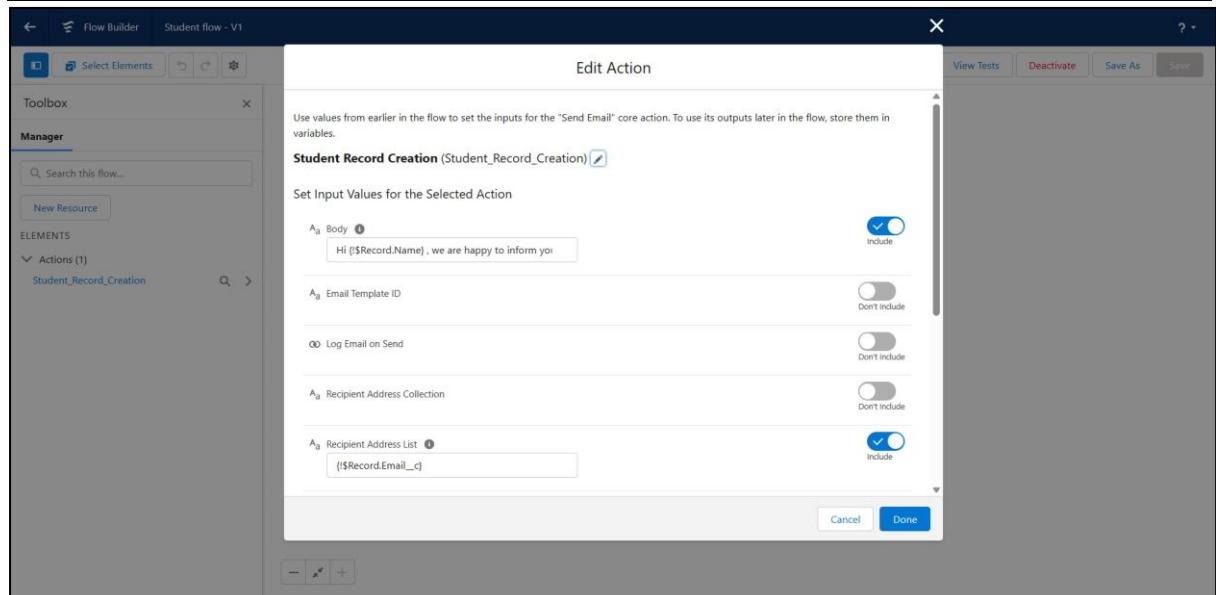
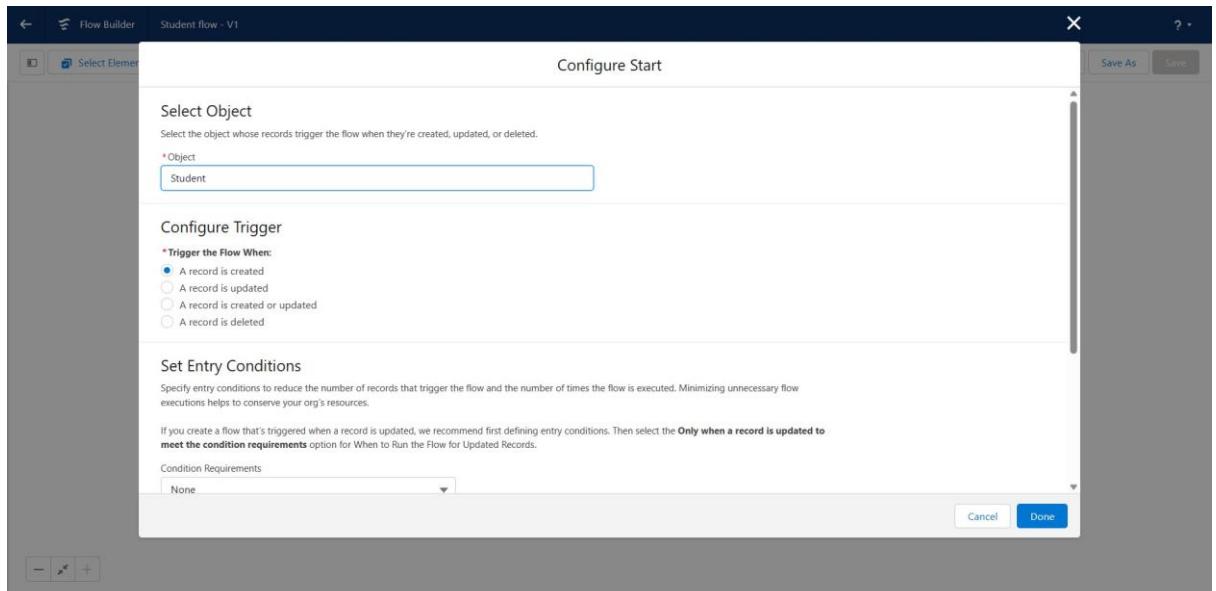
The top screenshot shows the 'Flows' section in the Salesforce Setup. It displays a list of 'Flow Definitions' under 'All Flows'. The list includes:

Flow Label	Process Type	Active	Tem...	Package State	Pack...	Last Mod...	Last Modified Date
Student flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Shivam Nandy	30/06/2023, 8:28 pm
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Verify Identity	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Reset Password	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Recurrence Schedule Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Orchestration flow for Recurrence Scheduler	Autolaunched Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Simple Product Default Template	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Reship Order Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
RMA Return Items	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
RMA Create Credit Memo and Ensure Refunds Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

The bottom screenshot shows the 'Flow Builder' interface for a flow named 'Student flow - V1'. The flow diagram is as follows:

```
graph TD; Start((Record-Triggered Flow Start)) --> Run[Run Immediately]; Run --> Action[Student Record Creation Action]; Action --> End((End));
```

The 'Toolbox' on the left contains various flow elements like 'Select Elements', 'Manager', 'New Resource', and 'Actions'. The 'ELEMENTS' section shows one action named 'Student\_Record\_Creation'.



## **6. ADVANTAGES & DISADVANTAGES**

Advantages:

- Centralized platform for managing various aspects of school operations
- Real-time data access and automation of manual processes
- Seamless communication channels between staff and students
- Customizable features to adapt to specific school requirements
- Enhanced decision-making through data-driven insights

Disadvantages:

- Initial setup and customization may require technical expertise
- Cost associated with Salesforce licenses and development efforts
- Training and adoption challenges for staff unfamiliar with Salesforce platform

## **7. APPLICATIONS**

The School Management System using Salesforce can be applied in various educational institutions, including:

- K-12 schools
- Colleges and universities
- Vocational training centers
- Online learning platforms

## **8. CONCLUSION**

In conclusion, the School Management System using Salesforce offers an efficient and comprehensive solution for managing school operations. By leveraging the Salesforce platform, it provides a unified platform for student information management, attendance tracking, grade management, scheduling, and reporting. The system improves administrative processes, enhances communication channels, and enables data-driven decision-making, ultimately leading to a better learning experience for students.

## **9. FUTURE SCOPE**

The School Management System using Salesforce has potential for future enhancements, including:

- Integration with other educational platforms and systems for seamless data exchange
- Mobile application development for convenient access to the system

- Advanced reporting and analytics features to gain deeper insights
- Integration with learning management systems for a more holistic educational experience

## **10. BIBLIOGRAPHY**

- <https://trailhead.salesforce.com/>
- <https://help.salesforce.com/>
- <https://smartinternz.com/>