VIRTUAL INTERNSHIP : SALESFORCE ADMINISTRATOR

Salesforce Guided Project

Creation of An Application For School Management

Submitted by:

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Under

Creation Of An Application For School Management

Project Description:

The School Management System using Salesforce is a project that involves developing a customized solution for managing various aspects of a school's operations using the Salesforce platform. It includes features such as student information management, attendance tracking, grade management, scheduling, and reporting, all integrated within the Salesforce CRM. This system can be used by schools to streamline their administrative processes, improve communication between staff and students, and enhance the overall learning experience for students.

Introduction:

What Is Salesforce?

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.

Creating Developer Org:

Created a developer org named : *App for school management*

User Name : anuragycce@ycce.in

Trail head url : https://trailblazer.me/id/aarvelliwar

Salesforce 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.

Creation School object :

Description

API Name	Enable Reports
School_Name__c	✓
Custom	Track Activities
✓	
Singular Label	Track Field History
School	
Plural Label	Deployment Status
Schools	Deployed
	Help Settings
	Standard salesforce.com Help Window
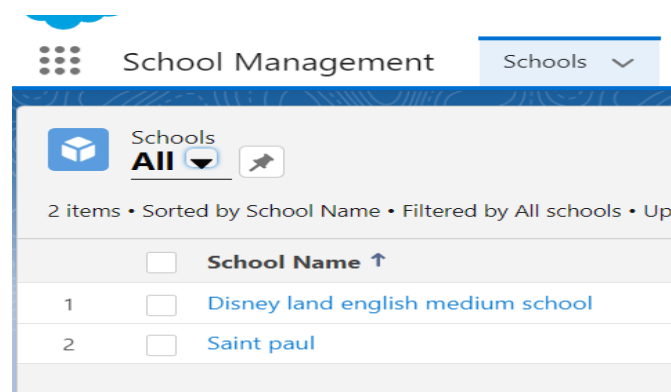
Creation of Student object :

Description

API Name
Student_Name__c

Custom
✓

Singular Label
Student

Plural Label
Students

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

☁

⠿⠿⠿ School Management   Schools ⌄   Students ⌄

🔴 Students
     All ⌄   📌

1 item • Sorted by Student Name • Filtered by All students • Updated a few secon

	☐	**Student Name** ↑
1	☐	Anurag Arvelliwar

Creation of Parents Object

Description

API Name
Parent_Name__c

Custom
✓

Singular Label
Parent

Plural Label
Parents

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

🔍 Search...

☁

⠿⠿⠿ School Management   Schools ⌄   Students ⌄   Parents ⌄

🟢 Parents
     Recently Viewed ⌄   📌

1 item • Updated a few seconds ago

	☐	**Parent Name**
1	☐	my dad

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:

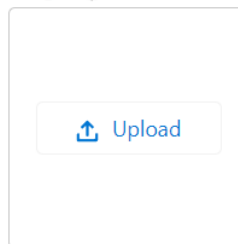### App Details

*App Name ⓘ

| School Management |

*Developer Name ⓘ

| School_Management |

Description ⓘ

| Enter a description... |

App Branding
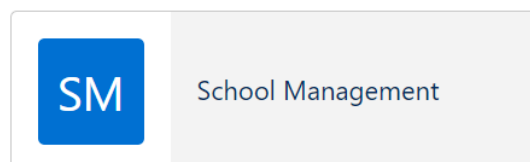
Image ⓘ

⬆ Upload

Primary Color Hex Value ⓘ

■ ▼ | #0070D2 |

Org Theme Options

☐ Use the app's image and color instead of the org's custom th

App Launcher Preview

SM   School Management

Q Search...

School Management   Schools ⌄   Students ⌄   Parents ⌄   Reports ⌄   Dashboards ⌄

Fields And Relationships:

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:

Fields & Relationships
11 Items, Sorted by Field Label

FIELD LABEL ▲	FIELD NAME	DATA TYPE
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)
Phone Number	Phone_Number__c	Phone

Creation Of Fields For The Student Objects:

Fields & Relationships
8 Items, Sorted by Field Label

Q Quick Find

FIELD LABEL ▲	FIELD NAME	DATA TYPE
Class	Class__c	Number(18, 0)
Created By	CreatedById	Lookup(User)
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)

Creation Of Fields For The Parent Objects:

Fields & Relationships
6 Items, Sorted by Field Label

Q Quick Find

FIELD LABEL ▲	FIELD NAME	DATA TYPE
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

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:

Profile
School Profile

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

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Acce
| Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Pres

Profile Detail	Edit	Clone	Delete	View Users

Name	School Profile
User License	Salesforce
Description	
Created By	Anurag Arvelliwar, 13/05/2023, 12:43 am

Custom Object Permissions for profile:

Custom Object Permissions

the object - Transfer all records for the object
- Share all records for the object - Administer
records in an approval process

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Parents	☑	☐	☐	☐	☑	☐	Students	☑	☐	☐	☐	☑	☐
Schools	☑	☐	☐	☐	☑	☐							

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.

	Action	Full Name ↑	Alias	Username
☐	| Edit	Arvelliwar, Anurag	AArve	anuragycce@ycce.in
☐	| Edit	Chatter Expert	Chatter	chatty.00d5i00000cyynmear.luhkc18ssm7j@chatter.salesforce.com
☐	| Edit	Parents	parent	schoolparent@gmail.com
☐	| Edit	Principals	prin	schoolprincipals@gmail.com
☐	| Edit	Teachers	teac	schoolteachers@gmail.com

(buttons: New User, Reset Password(s), Add Multiple Users)

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 Set
Principal permission

🔍 Find Settings...   ✖ | Clone | Edit Properties | Manage Assignments

Permission Set Overview

Description	
License	
Session Activation Required	☐
Last Modified By	Anurag Arvelliwar, 13/05/2023, 1:25 am

User Adoption

Create,view and Deletion of Record (School)

📦 Schools
All ▼ 📌

2 items • Sorted by School Name • Filtered by All schools • Updated a few seconds ago

		School Name ↑
1	☐	Disney land english medium school
2	☐	Saint paul

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:

- **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.
- **Summary Reports**:
  It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.
- **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.
- **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.

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.
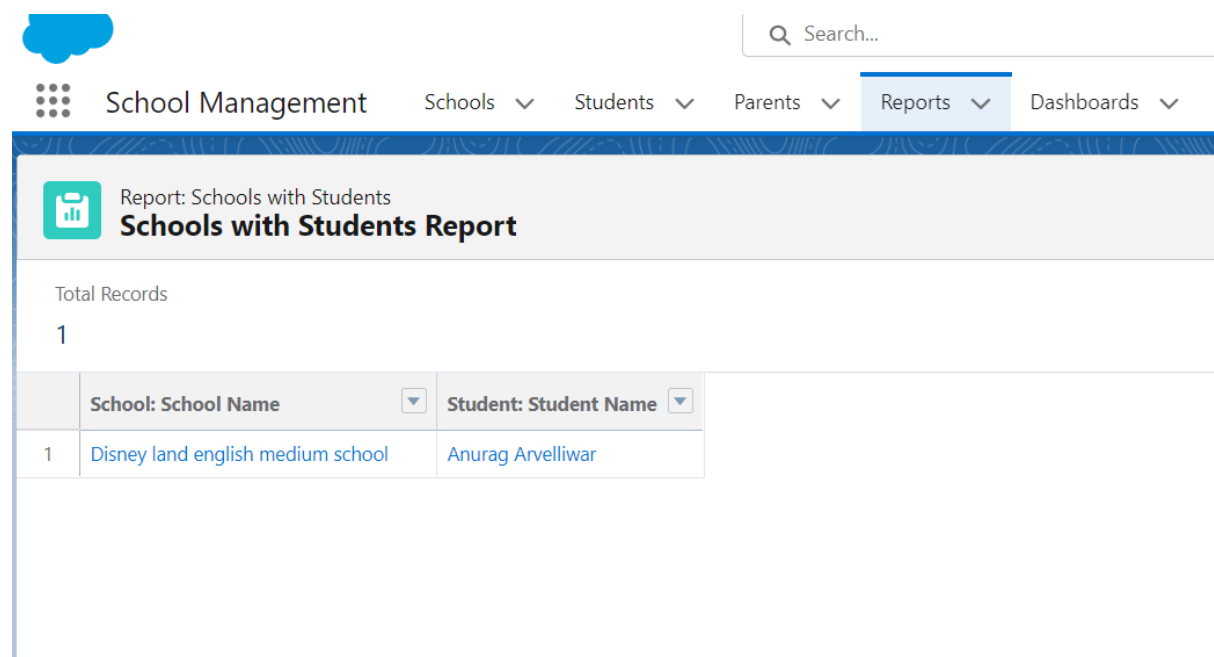
2. **Editor**:
   With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level As editor or manager.

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.