

# Project Report

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**Project Title: A CRM APPLICATION FOR SCHOOL/COLLEGE**



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## **1. Introduction:**

### **1.1 Overview**

It's Provide Real-time Knowledge for the entire Student.

1. Real time sales force project
2. Object & Relationship in sales force
3. Profile
4. Users
5. Lightning App
6. Permission sets
7. Reports

### **1.2 Purpose**

- 1 .This Project used to educational system.
2. I achieved of every object details like school, parent & student.

## 2. Problem Definition & Design Thinking:

### 2.1 Empathy map

named area

## CRM SCHOOL APPLICATION



## 2.2 Ideation & Brainstorming map



## 3. Result

### 3.1 Data Model:

Object name: Obj1

Fields in the object: Field label-School

Data type- Text

Object name: Obj2

Fields in the object: Field label- Student

Data type- Text

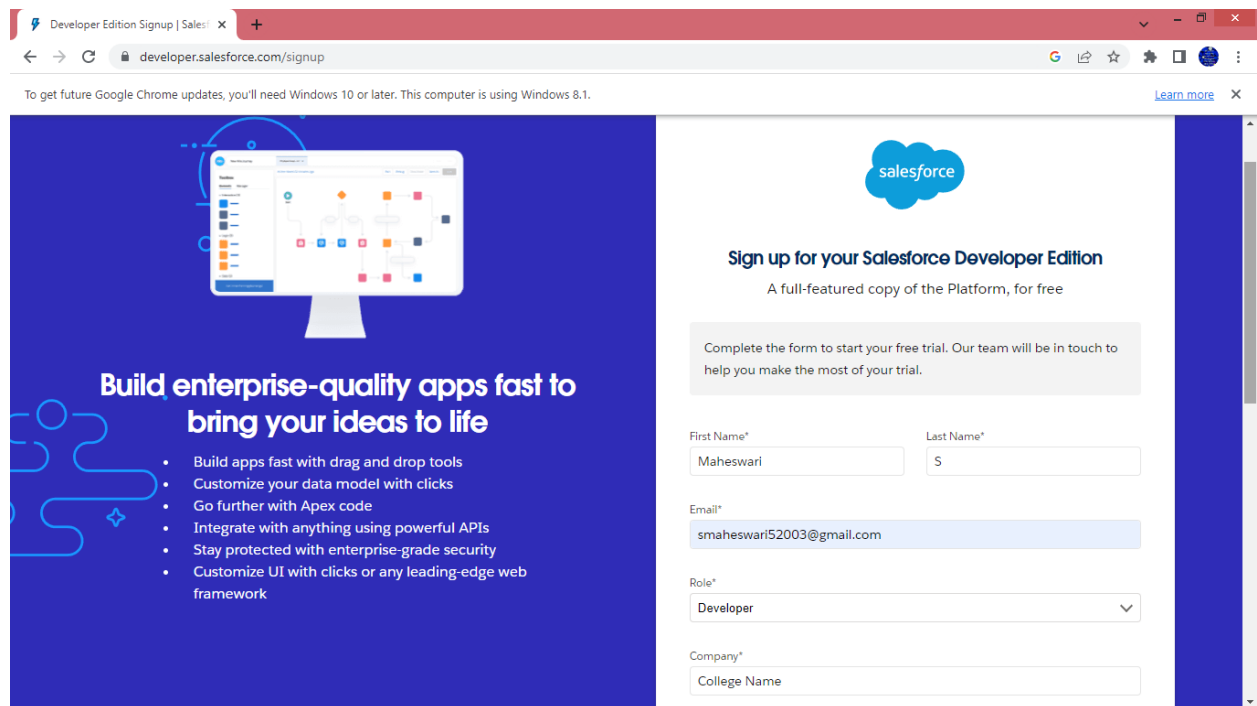
Object name: Obj3

Fields in the object: Field label-Parent

Data type-Text

### 3.2Activity& Screenshots


Activity: Creating Developer Account



Developer Edition Signup | Salesforce

developer.salesforce.com/signup

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 8.1. [Learn more](#)



### Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  Last Name\*

Email\*

Role\*

Company\*

### Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework



## Activity-1: Creation of School Object

The screenshot shows the Salesforce Setup interface for creating a custom object. The browser tabs include 'developer.salesforce.com', 'Choose a Username | Salesforce', 'School | Salesforce', and 'Users | Salesforce'. The URL is 'govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X9RO/edit?address=%2F0112w000003X9RO%2Fe%...'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Edit Custom Object School' and contains the 'Custom Object Definition Edit' form. The form includes fields for 'Label' (School), 'Plural Label' (Schools), 'Starts with vowel sound' (checked), 'Object Name' (School), and 'Description'. There are also buttons for 'Save', 'Save & New', and 'Cancel'. A 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'.

SETUP > OBJECT MANAGER  
**School**

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

**Custom Object Definition Edit** [Save] [Save & New] [Cancel]

**Custom Object Information** ⓘ = Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: School Example: Account

Plural Label: Schools Example: Accounts

Starts with vowel sound: ☒

The Object Name is used when referencing the object via the API.

Object Name: School Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content Name: --None--

The screenshot shows the Salesforce Setup interface for the 'School' custom object. The browser tabs include 'Developer Portal | Salesforce De...', 'Object Manager | Salesforce', and '+'. The URL is 'govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X9RO/Details/view'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Details' and shows the configuration for the 'School' object. The 'Details' section includes fields for 'Description', 'API Name' (School\_c), 'Custom' (checked), 'Singular Label' (School), 'Plural Label' (Schools), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and 'Standard salesforce.com Help Window'.

SETUP > OBJECT MANAGER  
**School**

**Details** [Edit] [Delete]

Description:

API Name: School\_c

Custom: ☒

Singular Label: School

Plural Label: Schools

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

## Activity 2: Create Student Object

developers.salesforce.com - Google x Choose a Username | Salesforce x Students | Salesforce x Users | Salesforce x +

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XAIU/edit?address=%2F012w000003XAIU%2Fe%3...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Students**

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

**Edit Custom Object**  
**Students** [Help for this Page](#)

**Custom Object Definition Edit** [Save](#) [Save & New](#) [Cancel](#)

**Custom Object Information** ⓘ = Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

developers.salesforce.com - Google x Choose a Username | Salesforce x Students | Salesforce x Users | Salesforce x +

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XAIU/edit?address=%2F012w000003XAIU%2Fe%3...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Students**

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Data Type

**Optional Features**

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing ⓘ

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

**Deployment Status** [What is this?](#)

- ☐ In Development
- ☒ Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

developer.salesforce.com - Google x Choose a Username | Salesforce x Students | Salesforce x Users | Salesforce x +

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XAIU/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Students**

**Details**

Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

**Details** Edit Delete

Description

API Name  
Students\_\_c

Custom  
✓

Singular Label  
Students

Plural Label  
Students

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

javascript:void(0);

### Activity 3: Create Parent Object

developer.salesforce.com - Google x Choose a Username | Salesforce x Parent | Salesforce x Users | Salesforce x +

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XB3R/edit?address=%2F012w000003XB3R%2Fe%3...

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

**Details**

Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules

Edit Custom Object  
**Parent** Help for this Page

**Custom Object Definition Edit** Save Save & New Cancel

**Custom Object Information** Required Information

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  
Parent Example: Account

Plural Label  
Parents Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  
Parent Example: Account

Description

Context-Sensitive Help Setting  
☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content Name  
--None--

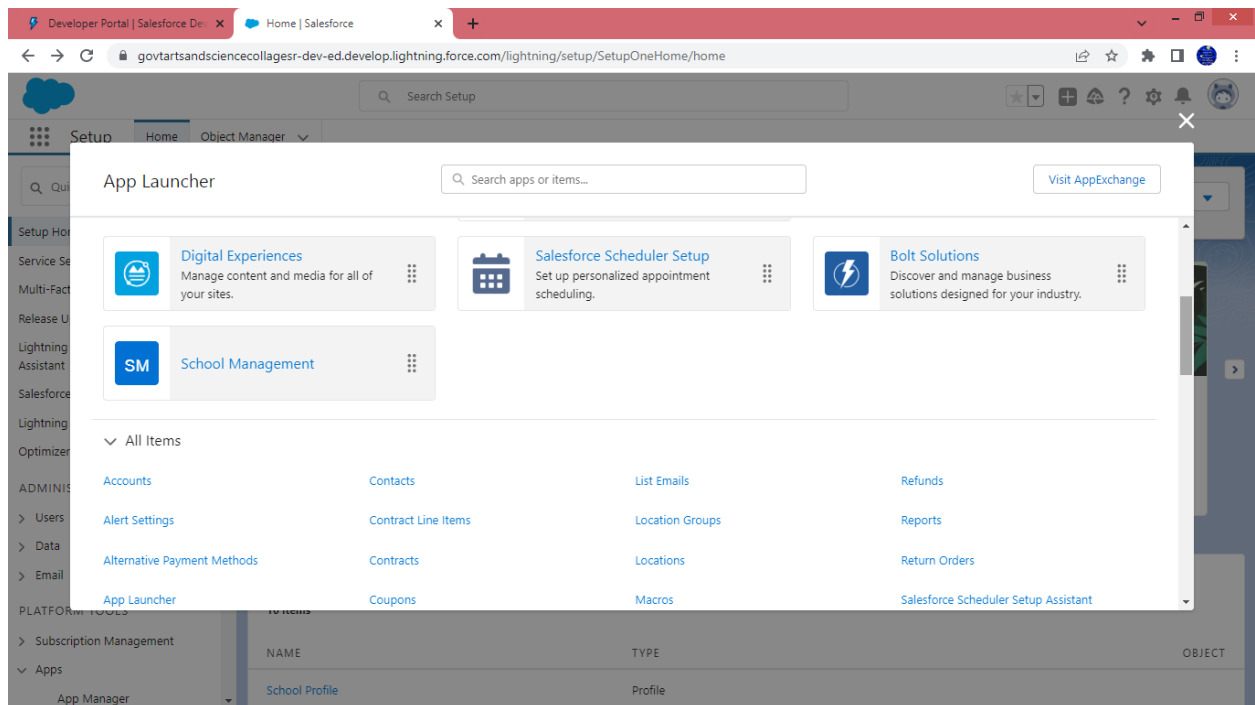
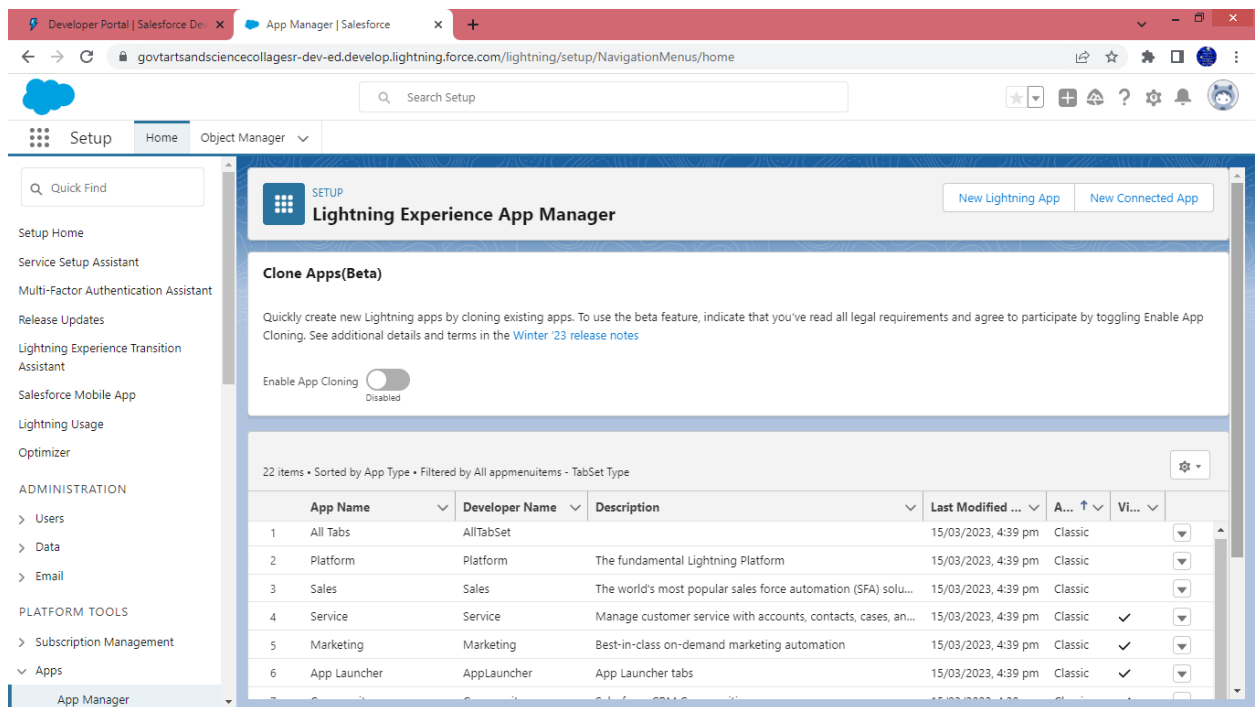


The screenshot shows the Salesforce Setup interface for configuring a new object named "Parent". The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled "SETUP > OBJECT MANAGER Parent". It includes a "Description" field, a "Context-Sensitive Help Setting" (with options to open the standard Salesforce.com Help & Training window or a custom Visualforce page), a "Content Name" dropdown (set to "None"), and an "Enter Record Name Label and Format" section. This section explains that the Record Name appears in page layouts, key lists, related lists, lookups, and search results, and provides an example: "Account Name" for Account and "Case Number" for Case. The Record Name is set to "truayl" and the Data Type is "Text". Below this is the "Optional Features" section, which includes checkboxes for "Allow Reports" (checked), "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing". The "Object Classification" section at the bottom states that when these settings are enabled, the object is classified as an Enterprise Application object, and when disabled, it is classified as a Light Application object.

The screenshot shows the Salesforce Setup interface for configuring a new object named "Parent", specifically the "Details" view. The left sidebar is the same as in the previous screenshot. The main content area is titled "SETUP > OBJECT MANAGER Parent" and includes "Edit" and "Delete" buttons. The "Details" section is divided into two columns. The left column contains fields for "Description", "API Name" (set to "Parent\_\_c"), "Custom" (checked), "Singular Label" (set to "Parent"), "Plural Label" (set to "Parents"), and "Record Types". The right column contains fields for "Enable Reports" (checked), "Track Activities", "Track Field History", "Deployment Status" (set to "Deployed"), "Help Settings" (set to "Standard salesforce.com Help Window"), and "Object Classification".

### MILESTON-3: Lightning App

Activity: Create the school Management App



## Milestone -4: Fields and Relationship

Activity: Create of fields for the school Object

Developer Portal | Salesforce Dev | School | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003X9RO/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER School

Details

**Fields & Relationships**

9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	UNIQUE
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Govt Hr Sec School,sundarapandiam	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
School	School__c	Text Area(255)		
state	state__c	Text Area(255)		

Developer Portal | Salesforce Dev | School | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003X9RO/FieldsAndRelationships/00N2w00000XZEP/...

Setup Home Object Manager

SETUP > OBJECT MANAGER School

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

School Custom Field

**Address**

Back to School

Validation Rules (0)

Custom Field Definition Detail

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

Field Information

Field Label	Address	Object Name	School
Field Name	Address	Data Type	Text Area
API Name	Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheeswari.s	Modified By	maheeswari.s
	26/03/2023, 11:44 am		26/03/2023, 11:44 am

General Options

Required ☐

Default Value

Validation Rules

New

Validation Rules Help

Developer Portal | Salesforce Dev | School | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003X9RO/FieldsAndRelationships/00N2w00000XZETB/...

Setup Home Object Manager

SETUP > OBJECT MANAGER School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

School Custom Field

Phone Number

Back to School

Validation Rules 0

Custom Field Definition Detail

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

Field Information

Field Label	Phone Number	Object Name	School
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheswari.s	Modified By	maheswari.s
	26/03/2023, 11:52 am		26/03/2023, 11:52 am

General Options

Required ☐

Default Value

Validation Rules

New

Validation Rules Help

Developer Portal | Salesforce Dev | School | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003X9RO/FieldsAndRelationships/00N2w00000aiQ7G/...

Setup Home Object Manager

SETUP > OBJECT MANAGER School

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

School Custom Field

state

Back to School

Validation Rules 0

Custom Field Definition Detail

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

Field Information

Field Label	state	Object Name	School
Field Name	state	Data Type	Text Area
API Name	state__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheswari.s	Modified By	maheswari.s
	08/04/2023, 8:43 pm		08/04/2023, 8:43 pm

General Options

Required ☐

Default Value

Validation Rules

New

Validation Rules Help

Developer Portal | Salesforce Dev | Students | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XAIU/FieldsAndRelationships/00N2w00000aianm/vi...

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Students

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Students Custom Field  
Class

Back to Students

Validation Rules 0

Custom Field Definition Detail

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

Field Information

Field Label	Class	Object Name	Students
Field Name	Class	Data Type	Number
API Name	Class__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheswari.s. 12/04/2023, 8:06 pm	Modified By	maheswari.s. 12/04/2023, 8:06 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>

## Activity-2: Creation of field for the student object

Developer Portal | Salesforce Dev | Students | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XAIU/FieldsAndRelationships/Name/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Students

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Students Field  
mahes

Back to Students

Set Field-Level Security View Field Accessibility

Field Information

Field Label	mahes	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

New

No validation rules defined.

Developer Portal | Salesforce Dev | Students | Salesforce

govartsandsciencecollages-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XAIU/FieldsAndRelationships/00N2w00000aianm/vi...

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Students**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules

Students Custom Field  
**Class**  
[Back to Students](#)

Validation Rules 0

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

Field Information

Field Label	Class	Object Name	Students
Field Name	Class	Data Type	Number
API Name	Class__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheswari.s. 12/04/2023, 8:06 pm	Modified By	maheswari.s. 12/04/2023, 8:06 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>

Developer Portal | Salesforce Dev | Students | Salesforce

govartsandsciencecollages-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XAIU/FieldsAndRelationships/00N2w00000aianc/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Students**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules

Students Custom Field  
**Result**  
[Back to Students](#)

Validation Rules 0

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

Field Information

Field Label	Result	Object Name	Students
Field Name	Result	Data Type	Picklist
API Name	Result__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheswari.s. 12/04/2023, 8:04 pm	Modified By	maheswari.s. 12/04/2023, 8:04 pm

General Options

Required	<input type="checkbox"/>
Default Value	1

Picklist Options

Restrict picklist to the values	<input checked="" type="checkbox"/>
---------------------------------	-------------------------------------

### Activity-3: Creation of fields for the parent object

Developer Portal | Salesforce Dev

Parent | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XB3R/FieldsAndRelationships/00N2w00000aiaoB/vi...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Parent Custom Field

Parent Address

Back to Parent

Validation Rules 0

Custom Field Definition Detail

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

Field Information

Field Label	Parent Address	Object Name	Parent
Field Name	Parent_Address	Data Type	Text Area
API Name	Parent_Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheswari.s	Modified By	maheswari.s
	12/04/2023, 8:12 pm		12/04/2023, 8:12 pm

General Options

Required ☐

Default Value

Validation Rules

New

Validation Rules Help

Developer Portal | Salesforce Dev

Parent | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XB3R/FieldsAndRelationships/Name/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Parent Field

Iruayi

Back to Parent

Set Field-Level Security View Field Accessibility

Field Information

Field Label	Iruayi	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

New

Validation Rules Help

No validation rules defined.

Developer Portal | Salesforce Dev | Parent | Salesforce

govtartsandsciencecollages-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003XB3R/FieldsAndRelationships/00N2w00000aiaoL/vi...

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Parent Custom Field  
**Parent Number**  
[Back to Parent](#)

Validation Rules (0)

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

**Field Information**

Field Label	Parent Number	Object Name	Parent
Field Name	Parent_Number	Data Type	Phone
API Name	Parent_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	maheswari.s. 12/04/2023, 8:13 pm	Modified By	maheswari.s. 12/04/2023, 8:13 pm

**General Options**

Required ☐

Default Value

**Validation Rules** [New](#) [Validation Rules Help](#)

## Milestone-5: Profile

### Activity: Creation on profile

developer.salesforce.com - Google | Choose a Username | Salesforce | Profiles | Salesforce

govtartsandsciencecollages-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000nwo2AAA%3FretURL%3D%25...

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication 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

**Profiles**

Cart Validation Output	<a href="#">Cart Validation Output Layout</a> (View Assignment)	Return Order Line Item	<a href="#">Return Order Line Item Layout</a> (View Assignment)
Case	<a href="#">Case Layout</a> (View Assignment)	Scorecard	<a href="#">Scorecard Layout</a> (View Assignment)
Case Close	<a href="#">Close Case Layout</a> (View Assignment)	Scorecard Association	<a href="#">Scorecard Association Layout</a> (View Assignment)
Case Milestone	<a href="#">Case Milestone Layout</a> (View Assignment)	Scorecard Metric	<a href="#">Scorecard Metric Layout</a> (View Assignment)
Consumption Rate	<a href="#">Consumption Rate Layout</a> (View Assignment)	Seller	<a href="#">Seller Layout</a> (View Assignment)
Consumption Schedule	<a href="#">Consumption Schedule Layout</a> (View Assignment)	Service Appointment	<a href="#">Service Appointment Layout</a> (View Assignment)
Contact	<a href="#">Contact Layout</a> (View Assignment)	Service Contract	<a href="#">Service Contract Layout</a> (View Assignment)
Contact Point Address	<a href="#">Contact Point Address Layout</a> (View Assignment)	Service Resource	<a href="#">Service Resource Layout</a> (View Assignment)
Contact Point Email	<a href="#">Contact Point Email Layout</a> (View Assignment)	Service Resource Skill	<a href="#">Service Resource Skill Layout</a> (View Assignment)
Contact Point Phone	<a href="#">Contact Point Phone Layout</a> (View Assignment)	Service Territory	<a href="#">Service Territory Layout</a> (View Assignment)
Contact Point Type Consent	<a href="#">Contact Point Type Consent Layout</a> (View Assignment)	Service Territory Member	<a href="#">Service Territory Member Layout</a> (View Assignment)
Content Version	<a href="#">Content Version Layout</a> (View Assignment)	Session Hijacking Event Store	<a href="#">Session Hijacking Event Store Layout</a> (View Assignment)
Contract	<a href="#">Contract Layout</a> (View Assignment)	Shift	<a href="#">Shift Layout</a> (View Assignment)
Contract Line Item	<a href="#">Contract Line Item Layout</a> (View Assignment)	Shift Work Topic	<a href="#">MISSHIG LABEL Property File - val ShiftWorkTopic not found in section Standard Layouts</a> (View Assignment)
Credential Stuffing Event Store	<a href="#">Credential Stuffing Event Store Layout</a> (View Assignment)	Skill Requirement	<a href="#">Skill Requirement Layout</a> (View Assignment)



**Clone Apps (Beta)**

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

22 items • Sorted by App Type • Filtered by All app menu items - TabSet Type

	App Name	Developer Name	Description	Last Modified	App Type	Visible
1	All Tabs	AllTabSet		15/03/2023, 4:39 pm	Classic	
2	Platform	Platform	The fundamental Lightning Platform	15/03/2023, 4:39 pm	Classic	
3	Sales	Sales	The world's most popular sales force automation (SFA) solu...	15/03/2023, 4:39 pm	Classic	
4	Service	Service	Manage customer service with accounts, contacts, cases, an...	15/03/2023, 4:39 pm	Classic	✓
5	Marketing	Marketing	Best-in-class on-demand marketing automation	15/03/2023, 4:39 pm	Classic	✓
6	App Launcher	AppLauncher	App Launcher tabs	15/03/2023, 4:39 pm	Classic	✓
7	Community	Community	Salesforce CRM Communities	15/03/2023, 4:39 pm	Classic	✓
8	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-...	15/03/2023, 4:39 pm	Classic	
9	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles an...	15/03/2023, 4:39 pm	Classic	✓

## Milestone-6: Users

### Activity: Creating Users

**Users**

User: **Esakkiammal M**

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Connected Apps](#) | [Third-Party Account Links](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

**User Detail** [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Name	Esakkiammal M	Role	Salesforce Platform
Alias	em	User License	Standard Platform User
Email	esakkiammal384@gmail.com	Profile	Standard Platform User
Username	esakkiammal384@gmail.com	Active	✓
Nickname	User16813160760329196625	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<a href="#">i</a>

Setup Home

Service Setup Assistant

Multi-Factor Authentication 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

Search Setup

Setup Users

User Profile Help for this Page

User Detail

Name: Jegatha S

Alias: js

Email: sankersvaran812@gmail.com

Username: sankersvaran812@gmail.com

Nickname: User16813158687837225415

Title:

Company:

Department:

Division:

Address:

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

Locale: English (India)

Language: English

Delegated Approver: Manager

Role: Salesforce Platform

User License: Standard Platform User

Profile: Active

Marketing User: ☒

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Mobile Push Registrations: View

Data.com User Type: ☐

Accessibility Mode (Classic Only): ☐

## Milestone-7: Permission

### Activity-1:

#### Permission sets 1:

Setup Home

Service Setup Assistant

Multi-Factor Authentication 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

Search Setup

Setup Permission Sets

Permission Set Overview

Description: teacher\_permission

API Name: teacher\_permission

License:

Session Activation Required: ☐

Namespace Prefix: maheswari\_s

Created By: maheswari\_s

Last Modified By: maheswari\_s

Created: 12/04/2023, 9:32 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

Visualforce Page Access

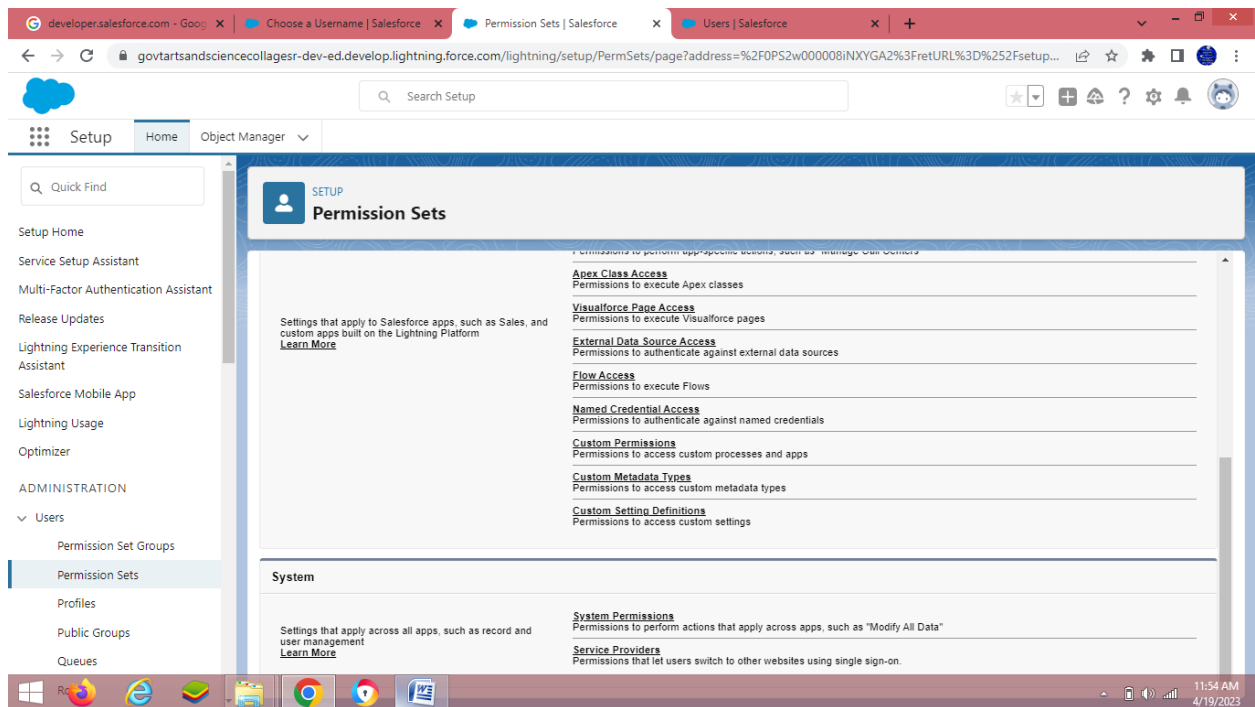
Permission to execute Visualforce pages

The screenshot shows the Salesforce Setup interface. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. Under ADMINISTRATION, 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets' (selected), 'Profiles', 'Public Groups', 'Queues', and 'Roles'. The main content area is titled 'Permission Sets' and includes a description: 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform'. It lists various permission categories with links to learn more: Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, Named Credential Access, Custom Permissions, Custom Metadata Types, Custom Setting Definitions, System Permissions, and Service Providers.

## Activity-2:

### Permission sets2:

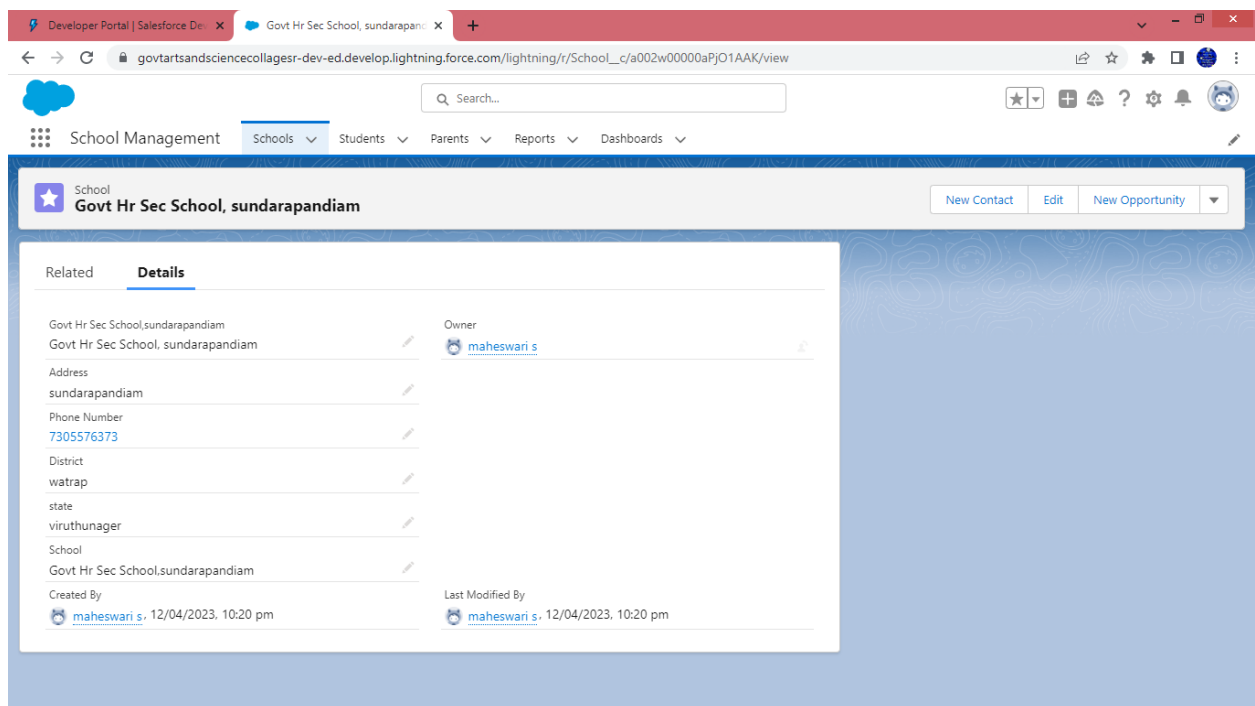
The screenshot shows the Salesforce Setup interface for a specific 'Principal permission' set. The left sidebar is identical to the previous screenshot, with 'Permission Sets' selected under 'Users'. The main content area is titled 'Principal permission' and includes a search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. Below this is a 'Permission Set Overview' section with a table showing details: Description, License, Session Activation Required (checkbox), Last Modified By (maheswari.s), API Name, Namespace Prefix, Created By (maheswari.s), and Created (12/04/2023, 9:57 pm). The 'Apps' section lists various app-related permissions with links to learn more: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access.



## Mileston-8: Reports

Activity:

Reports:



Developer Portal | Salesforce Dev | maheswari | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/r/Students\_c/a012w000018DICXAA5/view

Search...

School Management Schools Students Parents Reports Dashboards

Students maheswari New Contact Edit New Opportunity

Related Details

mahes maheswari	Owner
Result	maheswari s
pass fail	
Class	
10	
Created By	Last Modified By
maheswari s, 12/04/2023, 10:21 pm	maheswari s, 12/04/2023, 10:21 pm

Developer Portal | Salesforce Dev | Irulayi.s | Salesforce

govtartsandsciencecollagesr-dev-ed.develop.lightning.force.com/lightning/r/Parent\_c/a022w00000nHeVGAAQ/view

Search...

School Management Schools Students Parents Reports Dashboards

Parent Irulayi.s New Contact Edit New Opportunity

Related Details

Irulayi Irulayi.s	Owner
Parent Address	maheswari s
125,east street,sundarapandiam	
Parent Number	
9566896533	
Created By	Last Modified By
maheswari s, 12/04/2023, 10:22 pm	maheswari s, 12/04/2023, 10:22 pm

# Project Report

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## Project Title: A CRM APPLICATION FOR SCHOOL/COLLEGE

### 1. Introduction:

#### 1.1 Overview

It's Provide Real-time Knowledge for the entire Student.

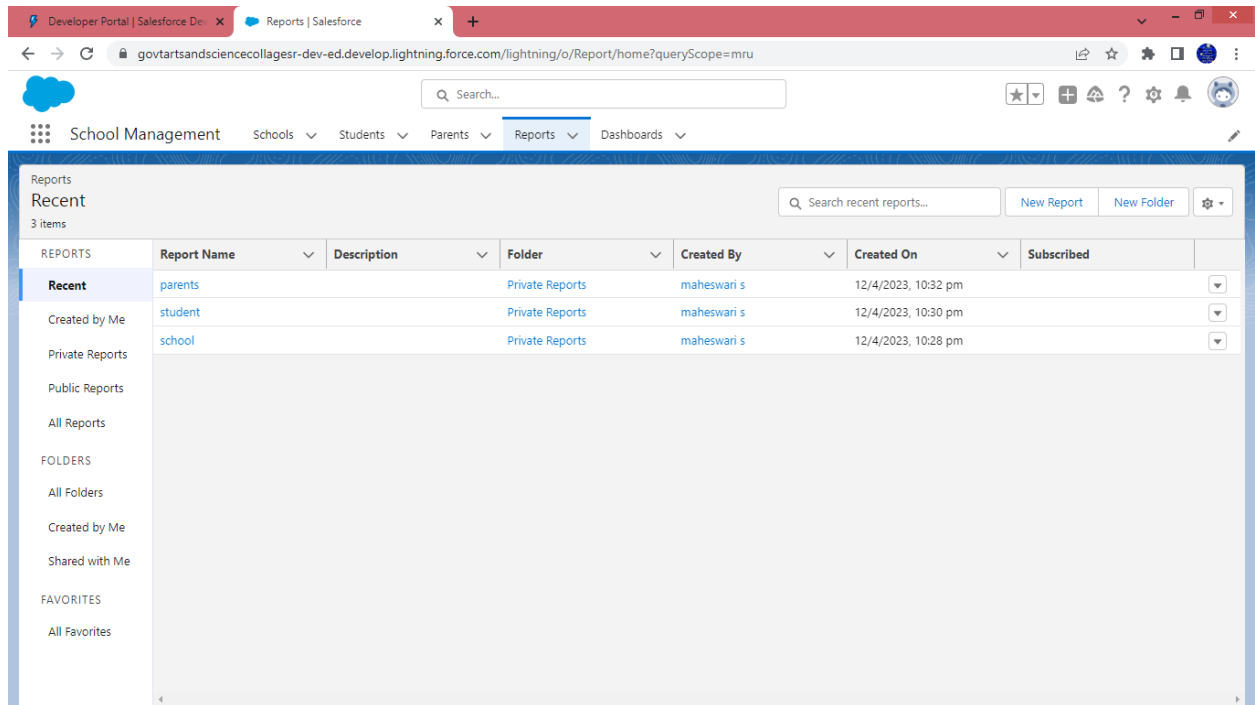
1. Real time sales force project
2. Object & Relationship in sales force
3. Profile
4. Users
5. Lightning App
6. Permission sets
7. Reports

#### 1.2 Purpose

- 1 .This Project used to educational system.
2. I achieved of every object details like school, parent & student.

### 2. Problem Definition & Design Thinking:

#### 2.1 Empathy map



#### 4. Trailhead profile public URL

1. Team leader: <https://trailblazer.me/id/s19sbco117>
2. Team Member1- <https://trailblazer.me/id/mahes1096>
3. Team Member2-<https://trailblazer.me/id/esakm4>
4. Team Member3- <http://trailblazer.me/id/spandeeswari>

#### 5. ADVANTAGES & DISVANTAGES

1. Its technology project.
2. Everyone used this project and edited the object.
- 3 .Multi users used this project of this disadvantage.
4. So single user used this project of best solution.

#### 6. APPLICATION

1. Sales force is your customer success platform, designed to help you sell, services, market and connect with your customer.

#### 7. CONCLUSION

1. Creating developer account, object, and school management.

2. Create the report document.
3. Finding every personal detail.

## **8. FUTURE SCOPE**

1. It can be made in schools and college.
2. It can be technology important of education.