

Creating Developer Org

Creating a developer org in salesforce.

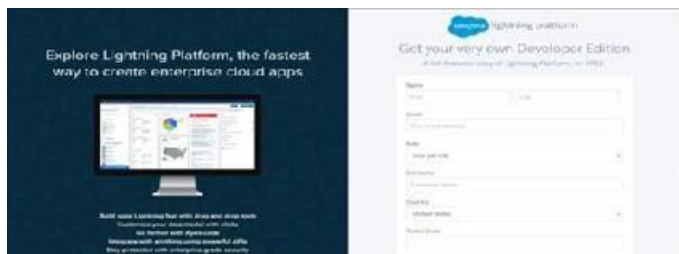
1. Go to developer.salesforce.com

2. Click on sign up.

3. On the sign up form, enter the following details

- a. First name & Last name
 - b. Email
 - c. Role - Developer
 - d. Company - College Name
 - e. Country - India
 - f. Postal Code - pin code
 - g. Username- should be a combination of your name and company
- This need not be an actual email id, you can give anything in the format :
username@organization.com

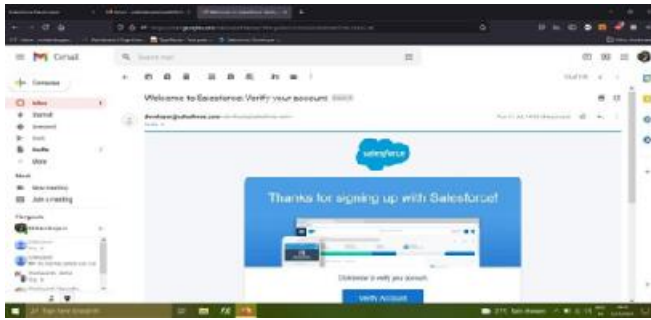
Click on sign up after filling these.



Account

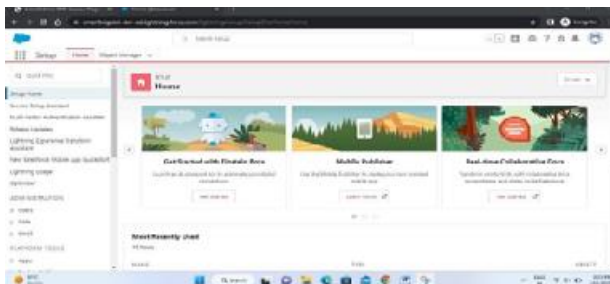
Activation

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



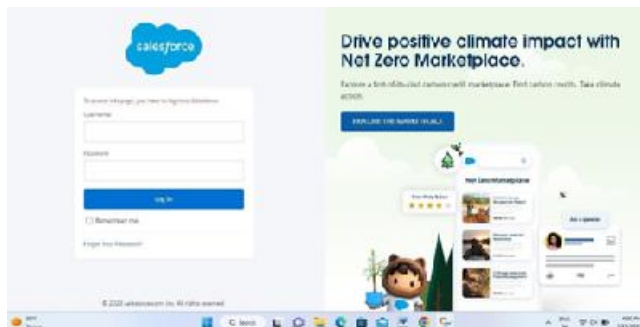
Login To Your Salesforce Account

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



Salesforce Login

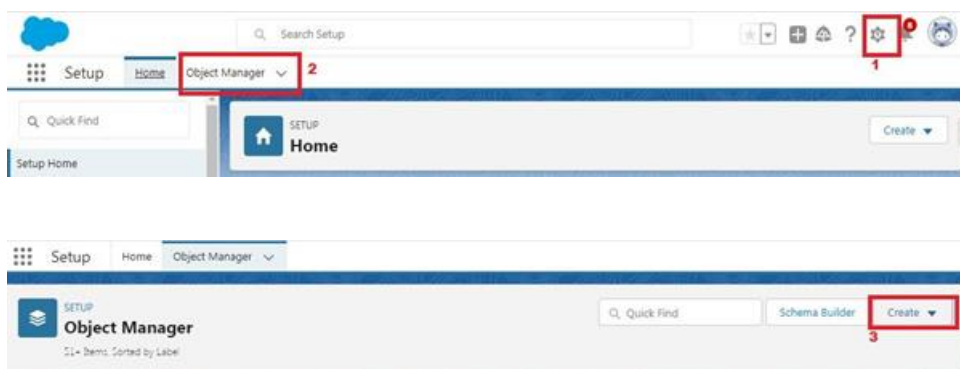
`https://login.salesforce.com`



Creation Of School Object Creation Of Objects For School Management

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

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



New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular noun plural belongs to this object lookup, and records. **5**

Name: **School** Example: Account

Plural Name: **SCHOOLS** Example: ACCOUNTS

Starts with: **School** **6**

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

Object Name: **School** Example: Account

Description:

Enter Record Name Label and Format

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 must be unique and cannot contain spaces or special characters.

Record Name: **School Name** Example: Account Name

Record Type: **Text** **7**

Optional Features

☒ Allow Reports **8**

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Now create a custom tab. Click the Home tab.



Step 1. Enter the Details **Step 1 of 3**

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now. **3**

Object: **None**

Tab Style: **Table** **4**

Create Student Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:
 - Label: Student
 - Plural Label: Students
 - Record Name: Student Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox
 - Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

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

Create Parent Object

Click on the gear icon and then select Setup.

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

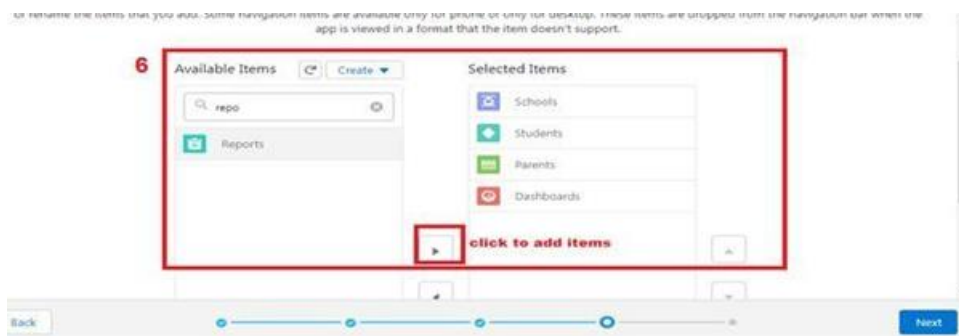
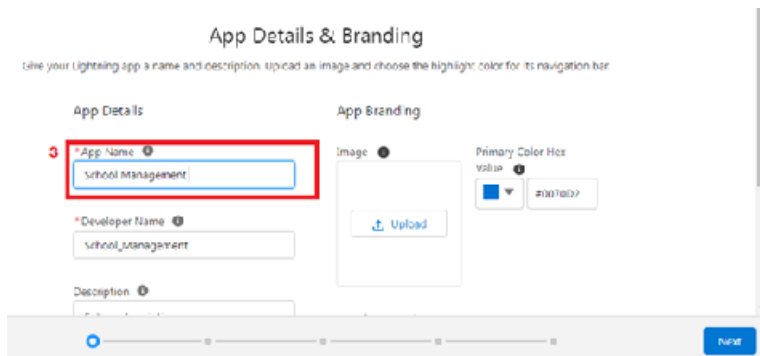
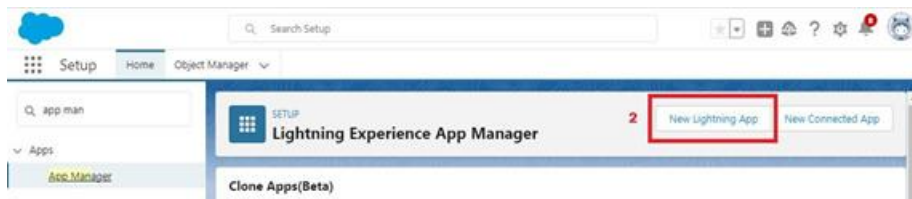
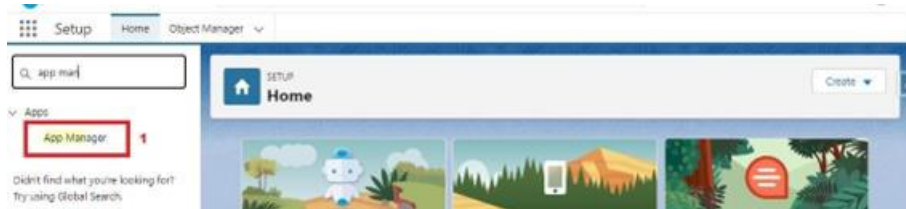
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

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

Create The School Management App

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

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





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

Note:

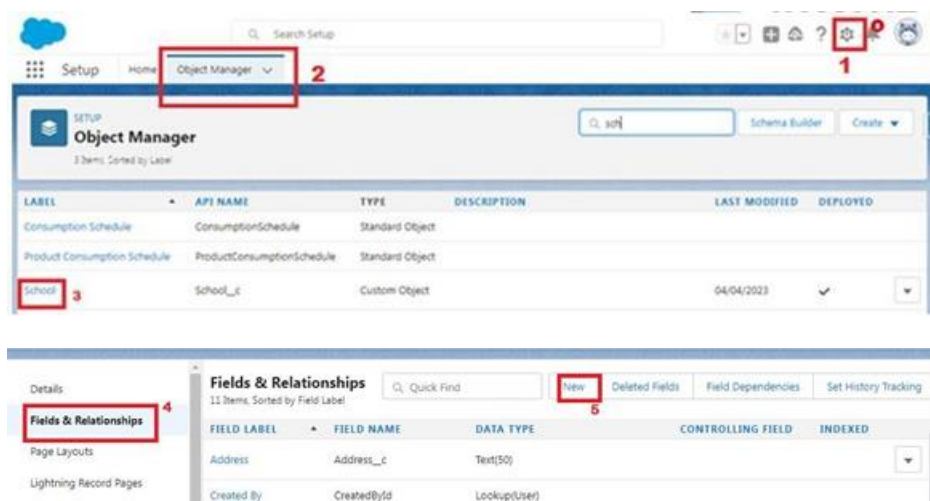
App Launcher-Displays available apps.

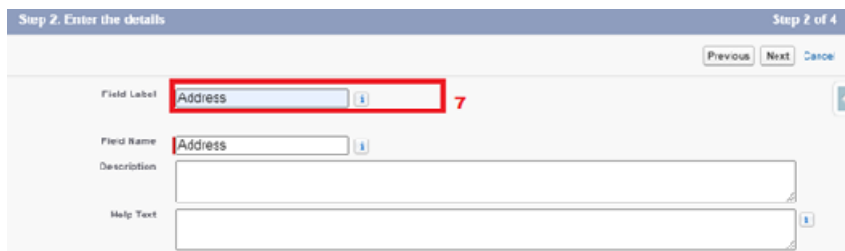
App Name-Displays the current selected app.

Navigation menu -Displays the tabs available inside the app.

Creation Of Fields For The School Objects

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text Area as the Data Type, click Next.
7. For Field Label, enter Address.
8. Click Next, Next, then Save & New.
9. Follow steps 1 to 3 and create two more Text type field - District & State.
10. Create URL type field & give School website as the field label.





Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type.

Let's see this

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

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

Creation Of Fields For The Student Objects

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

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

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

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

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

Let's create a Pick-List field:

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

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

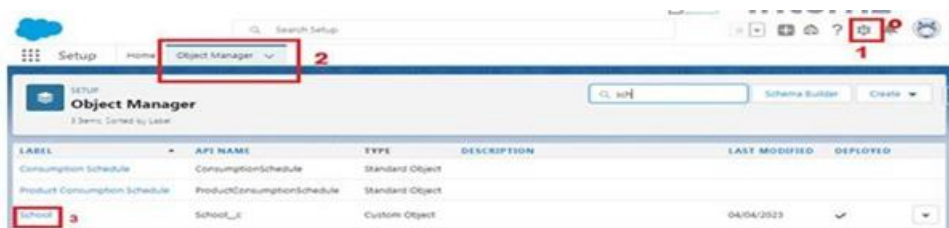
Let's create a Number field:

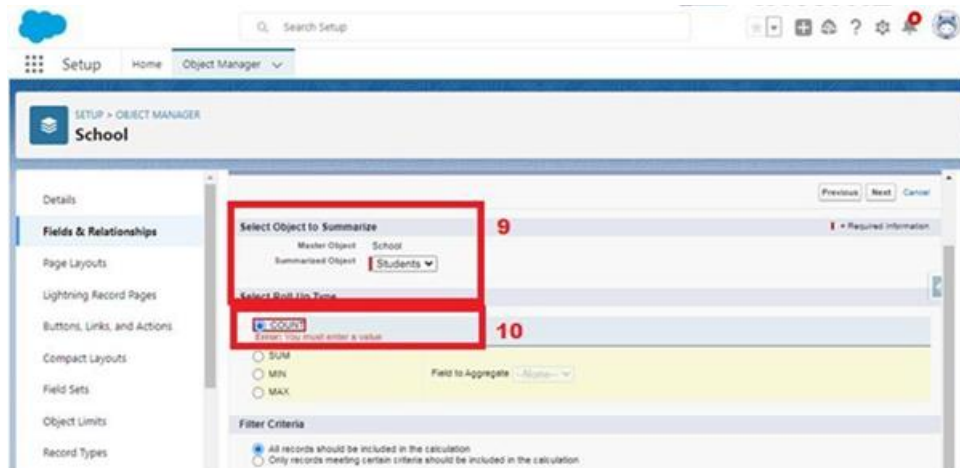
Note- Follow above steps 1 to 5 to create field and then follow below steps

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

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

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





Create one more rollup summary field-

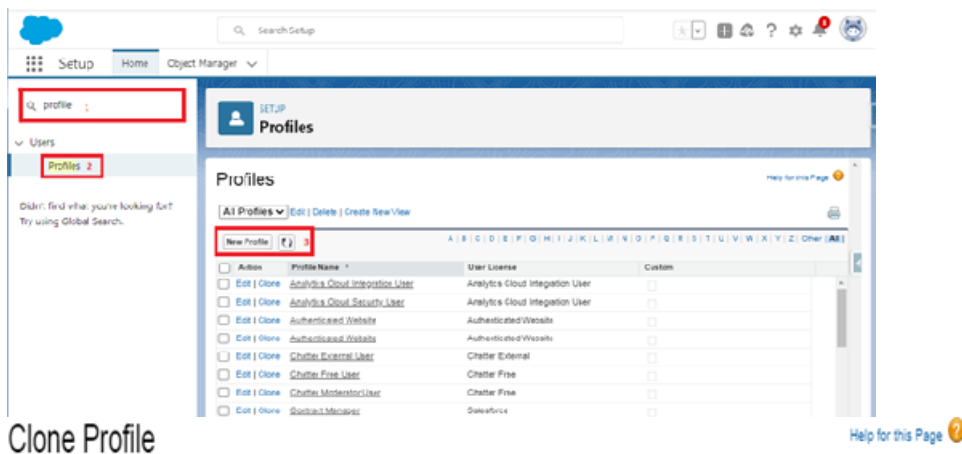
- From Setup, click Object Manager and select School.
- Click Fields & Relationships, then New.
- Select the Roll-up summary field as data type
- Enter the field label as Highest Marks
- Click Next
- Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate.
- click Next, Next and save.

Creation Of Fields For The Parent Objects

- Select the Text Area as the Data Type, then click Next.
- For Field Label, enter Parent Address.
- Click Next, Next, then Save & New.
- Select the Phone as the Data Type, then click Next.
- For Field Label, enter Parent Number.
- Click Next, Next, then Save & New

Creation On Profile

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



The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Profiles' link is highlighted with a red box and labeled '2'. The main content area shows the 'Profiles' page. The 'New Profile' button is highlighted with a red box and labeled '3'. Below the button is a table of existing profiles. The 'Standard User' profile is highlighted in the table.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	AuthenticatedWebsite	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	AuthenticatedWebsite	AuthenticatedWebsite	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>

Clone Profile

Enter the name of the new profile.

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

Existing Profile:

User License: Salesforce

Profile Name: 4

5

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drivers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Creating A User

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as salesforce.
6. NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license or change the license type from Salesforce to any other.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
9. Similarly follow the above steps and create 2 users as Teachers and principals.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is visible with 'Users' selected under 'User Management Settings'. The main area displays the 'All Users' page. At the top, there's a search bar with 'user' entered. Below the search bar, there's a table of users. A red box highlights the 'New User' button in the top right corner of the table. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The first three users are '1 User', '2 User', and 'Chatter Expert'. The last user is 'Teddy John'.

New User

Help for this Page

User Edit Save Save & New Cancel

General Information Required Information

First Name Parents 4

Last Name pare

Alias

Email

Username

Nickname

Title

Role <None Specified>

User License Salesforce 5

Profile School profile 6

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Permission Sets 1

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

Q permis 1

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

New 2

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see p...	82B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows a...	82B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or S...	CRM User

SETUP

Permission Sets

Save Cancel

Enter permission set information Required Information

Label teacher permission 3

API Name teacher_permission

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.

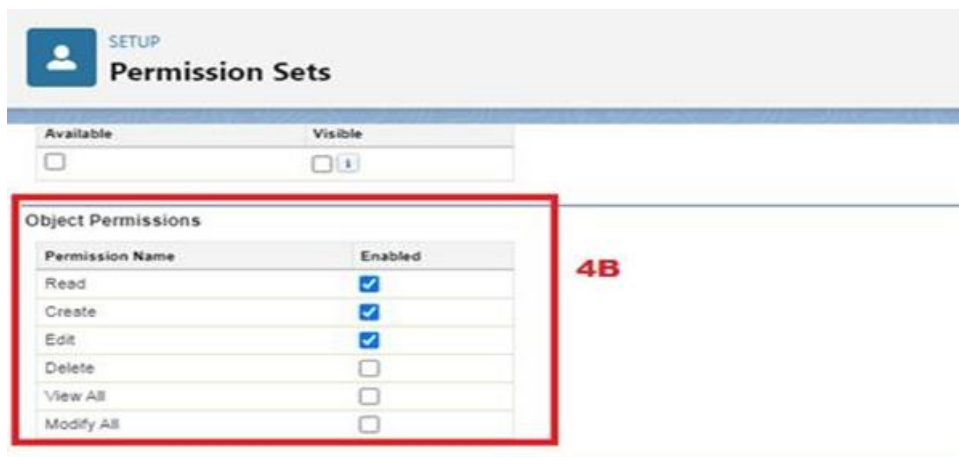
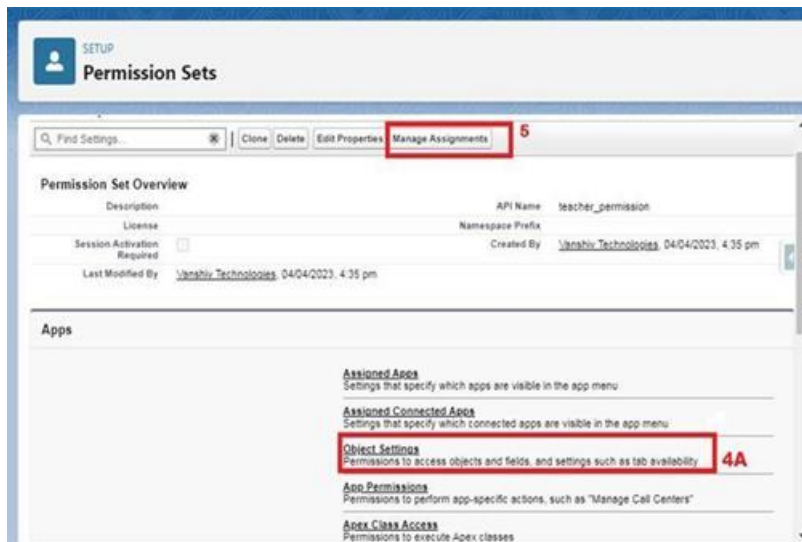
-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

License --None--

Save Cancel



Similarly, follow the above steps for the permission set 2.

Permission Sets 2

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

Create Record (School)

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

The first screenshot shows the Salesforce App Launcher (grid icon) highlighted with a red box and labeled '1'. The second screenshot shows the 'School Management app' selected in the search results, highlighted with a red box and labeled '2'. The third screenshot shows the 'Schools' tab selected in the navigation bar, highlighted with a red box and labeled '3'. The fourth screenshot shows the 'New' button highlighted with a red box and labeled '4'. The fifth screenshot shows the 'Information' section of the new school record form, with the input fields highlighted by a red box and labeled '5'. The sixth screenshot shows the 'Save' button highlighted with a red box and labeled '6'.

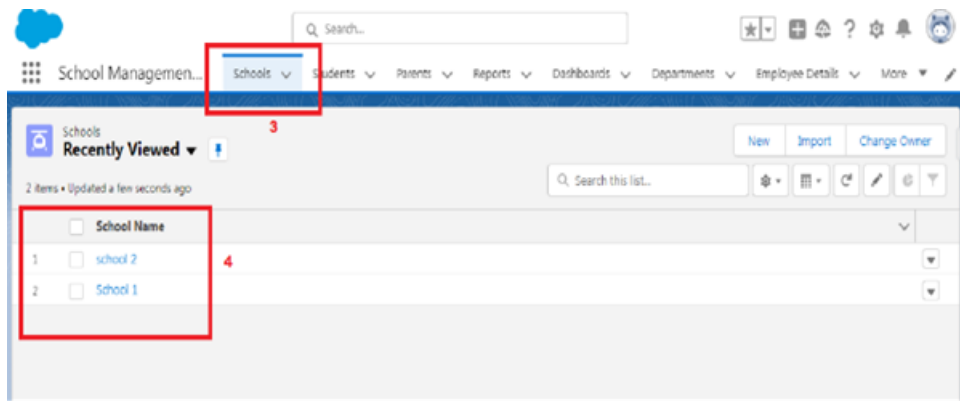
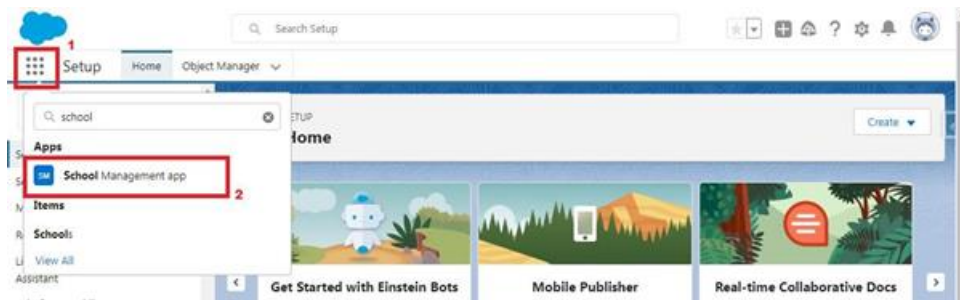
Information

* School Name	Owner
Saint Paul	[Redacted]
Address	
123 -Mansarovar	
District	
jaipur	
State	
Rajasthan	
School website	
www.SaintPaul.com	

Cancel Save & New Save

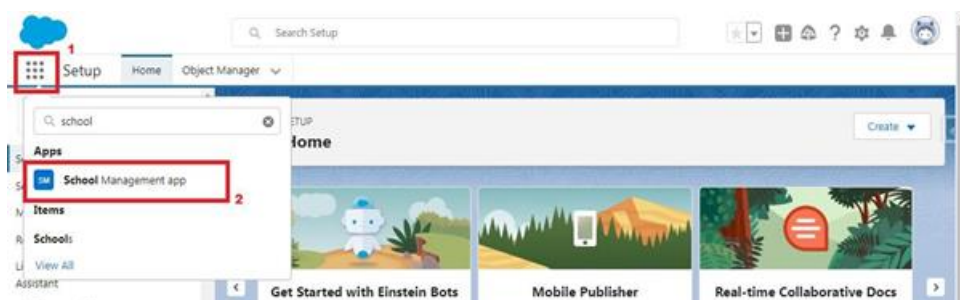
View Record (School)

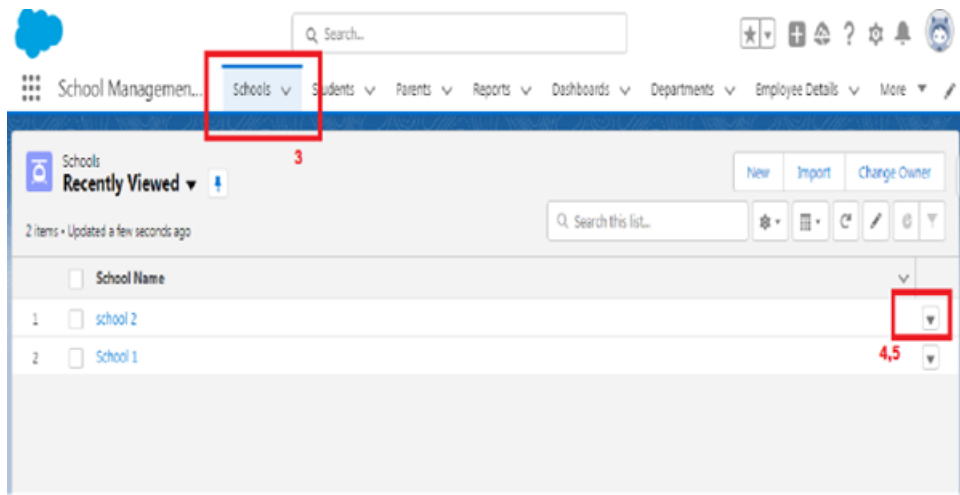
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on any record name. you can see the details of the School.



Delete Record (School)

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





Create Report

Reports:

1. In School Management App click Reports tab.
 2. Click New Report.
 3. Select the report type as School with students and parents for the report.
 4. Click start report.
 5. Customize your report, then save and run
 6. Give report name - Schools with Students Report
 7. Click Save
- NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in "Select a report type option").

School Management... Schools Students Parents **Reports** Dashboards

Reports

Recent

3 items

Q Search recent reports... **New Report** New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity Details		Private Reports		4/4/2023, 1:54 am	
Created by Me	Vehicle Details		Private Reports		3/4/2023, 7:12 pm	
Private Reports	Sample Flow Report: Screen Flow	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	3/4/2023, 1:27 pm	
Public Reports						
All Reports						

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Select a Report Type

Q Search...

Report Type Name	Category
Schools	Standard
Schools with Students	Standard

Details

Schools with Students

Standard Report Type

Start Report

Details

Fields (28)

Created By You

School Management... Schools Students Parents Reports Dashboards

REPORT

New Schools with Students Report

Schools with Students

Q Search...

Save & Run

Save

Close

Run

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

Update Preview Automatically

Outline

Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

School: School Name

student: student Name

School: School Name	student: student Name
1 school 2	Markk
2 school 2	Ferry
3 School 1	Jack

Save Report

*** Report Name**

Report Unique Name

Report Description

Cancel
Save

View Report

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

1 Setup Home Object Manager

2 School Management app

School Management... Schools Students Parents **3** Reports Dashboards Departments Employee Details More

4 Schools with Students Report

Report Name	Description	Folder	Created By	Created On	Subscribed
Schools with Students Report		Private Reports	Vanshiv Technologies	14/4/2023, 5:55 pm	
Properties with Customer Name Report		Private Reports	Vanshiv Technologies	8/4/2023, 11:48 pm	
Events with Attendees		Private Reports	Vanshiv Technologies	6/4/2023, 4:35 pm	
Candidate Internal Result Report		Private Reports	Vanshiv Technologies	9/4/2023, 7:57 pm	
Job application with					