LONG TERM VIRTUAL INTERNSHIP

(Salesforce Administrator)

Project On

CREATION OF AN APPLICATION FOR STUDENT MANAGEMENT-ADMIN

Team ID : LTVIP2023TMID01205

Creation Of An Application For School Management - Admin

I am PIDATALA JOHN WESLEY and my team is JONNADULA DURGA RAO, KALLAKURI SAI TEJA, GANNAMANENI VENKAT CHOWDARY.

We are working as the administrators of the salesforce in the long term virtual internship.

SALESFORCE: Salesforce is a cloud-based customer relationship management (CRM) platform that provides a suite of tools and services to help businesses manage their sales, marketing, customer service, and other aspects of their operations. The company was founded in 1999 by Marc Benioff and Parker Harris, and it has since become one of the leading CRM providers in the world. Salesforce's CRM platform offers various modules and features that enable businesses to streamline their processes and enhance their customer interactions. Some key components and features of Salesforce include:

1. Sales Cloud: This module focuses on sales automation, lead management, opportunity tracking, and performance analytics to help sales teams manage their leads and deals effectively.
2. Service Cloud: It provides tools for customer service and support, enabling businesses to create cases, track customer inquiries, and manage service requests.
3. Marketing Cloud: This module assists with marketing automation, email marketing, social media marketing, and customer journey mapping to reach and engage with customers across various channels.
4. Commerce Cloud: Formerly known as Demandware, it offers solutions for e-commerce businesses, facilitating online shopping experiences and order management.
5. Community Cloud: This feature helps organizations build custom online communities to connect with customers, partners, and employees.
6. Platform and AppExchange: Salesforce's platform allows businesses to create and customize their applications using Salesforce tools and APIs. The AppExchange is an online marketplace where businesses can find and install third-party applications that integrate with Salesforce.
7. Einstein AI: Salesforce's AI-powered technology, called Einstein, provides predictive analytics, data insights, and AI-driven recommendations to improve decision-making and efficiency.

Salesforce's cloud-based architecture ensures that all data is stored securely in the cloud, accessible from anywhere with an internet connection. This approach

eliminates the need for on-premises software installation and enables easy scalability and updates.

The company caters to businesses of all sizes, from small startups to large enterprises, across various industries. Salesforce has established a strong ecosystem of developers, partners, and users, contributing to its widespread adoption and continuous growth in the CRM market.

SALESFORCE ADMINISTRATOR : A Salesforce Administrator is a professional responsible for the setup, configuration, and maintenance of a Salesforce instance within an organization. They play a crucial role in ensuring that the Salesforce platform is customized to meet the specific needs of the business and its users. Salesforce Administrators work to optimize the platform's functionality, improve user adoption, and support various departments, such as sales, marketing, and customer service.

Key responsibilities of a Salesforce Administrator include:

1. Configuration and Customization: Salesforce Administrators configure the platform based on the organization's requirements. They customize fields, objects, page layouts, workflows, and validation rules to match the business processes.
2. User Management: They create and manage user accounts, profiles, roles, and permissions to control access and security levels for different users and teams.
3. Data Management: Administrators oversee data integrity, import/export data, and ensure data cleanliness. They may also define data sharing rules and manage data storage limits.
4. Reports and Dashboards: Administrators create and maintain reports and dashboards to provide insights into business performance and help users analyze data effectively.
5. Automation: They use tools like workflows, process builder, and automation rules to automate repetitive tasks and streamline business processes.
6. Training and Support: Administrators provide training to new users and ongoing support to existing users to ensure they can use Salesforce effectively and efficiently.
7. AppExchange Management: They may evaluate and install third-party applications from the Salesforce AppExchange to extend the platform's functionality as needed.
8. System Maintenance: Administrators perform regular system maintenance, including updates, backups, and monitoring for performance issues.

Salesforce Administrators often collaborate with other stakeholders, such as Salesforce developers, business analysts, and project managers, to implement new features or address complex business requirements. They should stay updated on Salesforce's latest features and best practices to ensure the platform is being utilized to its full potential.

For large organizations or complex Salesforce implementations, there may be multiple administrators specializing in different areas, such as Sales Cloud Administrator, Service Cloud Administrator, or Platform Administrator. Salesforce offers certifications, such as the Salesforce Certified Administrator credential, to recognize professionals who demonstrate expertise in administering Salesforce instances.

SALESFORCE ORG: In the context of Salesforce, an "org" is a commonly used abbreviation for "organization," and it refers to a single instance of the Salesforce platform used by a specific company or entity. Each Salesforce org is a self-contained environment that houses all the data, configurations, customizations, and applications for that particular organization.

Here are some key points to understand about Salesforce orgs:

1. Isolation: Each Salesforce org is logically isolated from other orgs, meaning the data and customizations of one org are not accessible or visible to other orgs.
2. Single Sign-On: Users within an org have single sign-on access, allowing them to access all the features and data based on their assigned permissions.
3. Customizations: Organizations can customize their Salesforce org to fit their unique business processes by configuring objects, fields, layouts, workflows, and more.
4. Data: All data specific to the organization, including customer records, opportunities, cases, and other relevant information, is stored within that particular org.
5. Applications: Organizations can use the Salesforce AppExchange to install third-party applications or develop custom applications to extend the functionality of their org.
6. Limits and Licensing: Each Salesforce org has its own limitations on data storage, custom objects, user licenses, and other factors based on the type of Salesforce edition and the number of licenses purchased.
7. Sandbox Orgs: Salesforce provides the ability to create sandbox orgs, which are copies of the production org used for development, testing, and training purposes without affecting the live data.

8. Instance: Salesforce operates multiple data centers, and each data center contains a set of orgs. These data centers are referred to as "instances." Orgs may be hosted on different instances based on factors like geographic location and availability.
9. Production Org: The main, live org where day-to-day operations are conducted is often referred to as the "production org."
10. Developer Org: Salesforce offers free developer orgs for developers and administrators to build, test, and experiment with new features without impacting a production environment.

Salesforce orgs are versatile and can cater to businesses of all sizes, from small startups to large enterprises. Each org can be configured to support different departments, such as sales, marketing, customer service, and more. The flexibility and scalability of Salesforce orgs make the platform suitable for a wide range of industries and use cases.

PROJECT

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.

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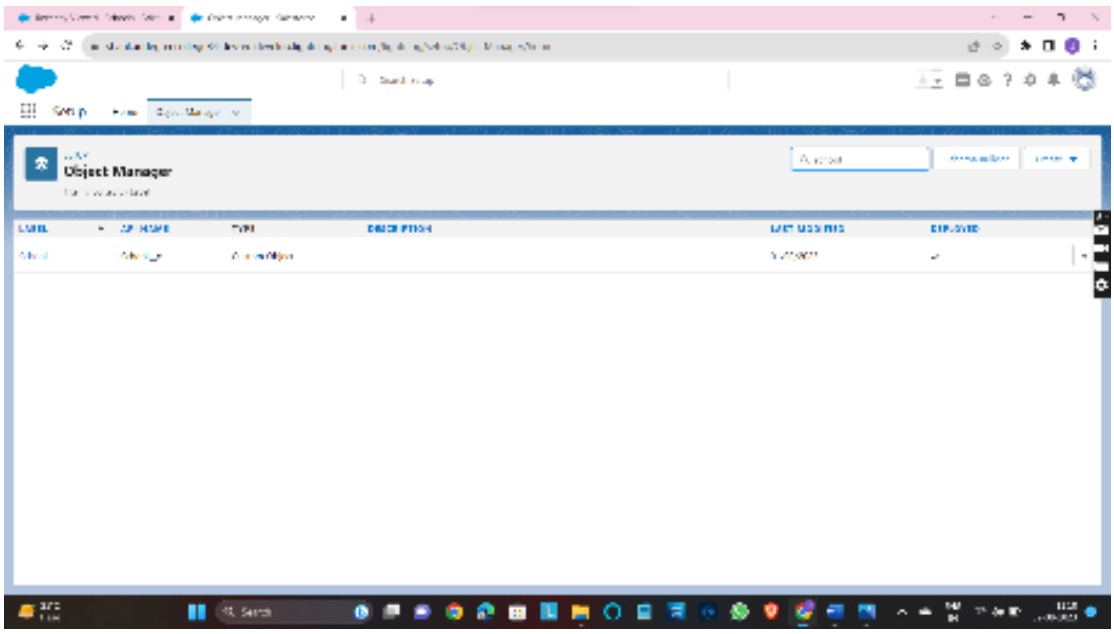
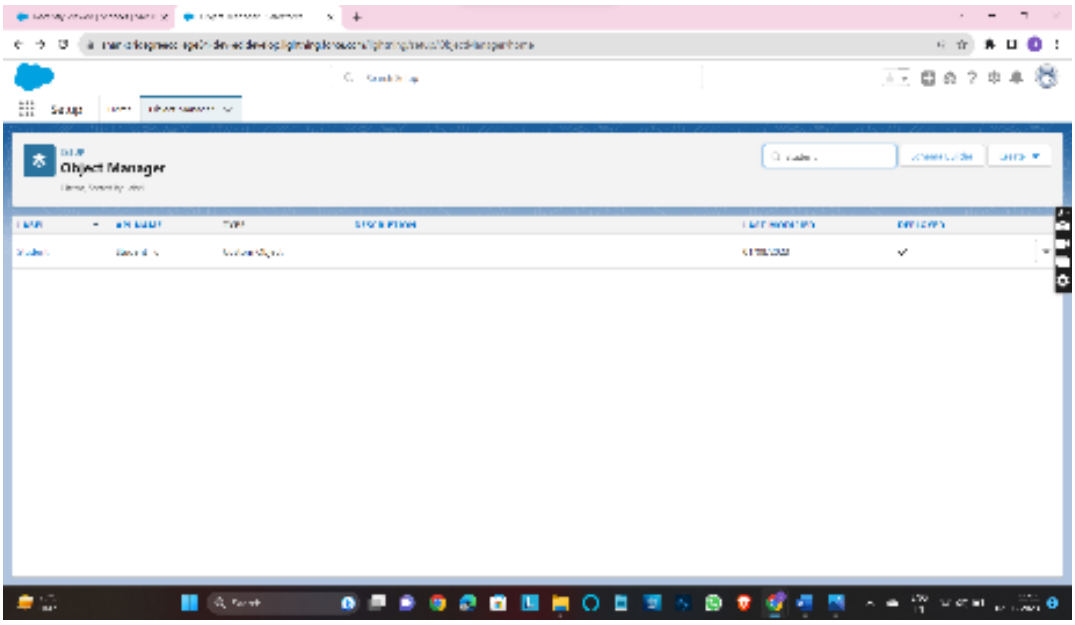
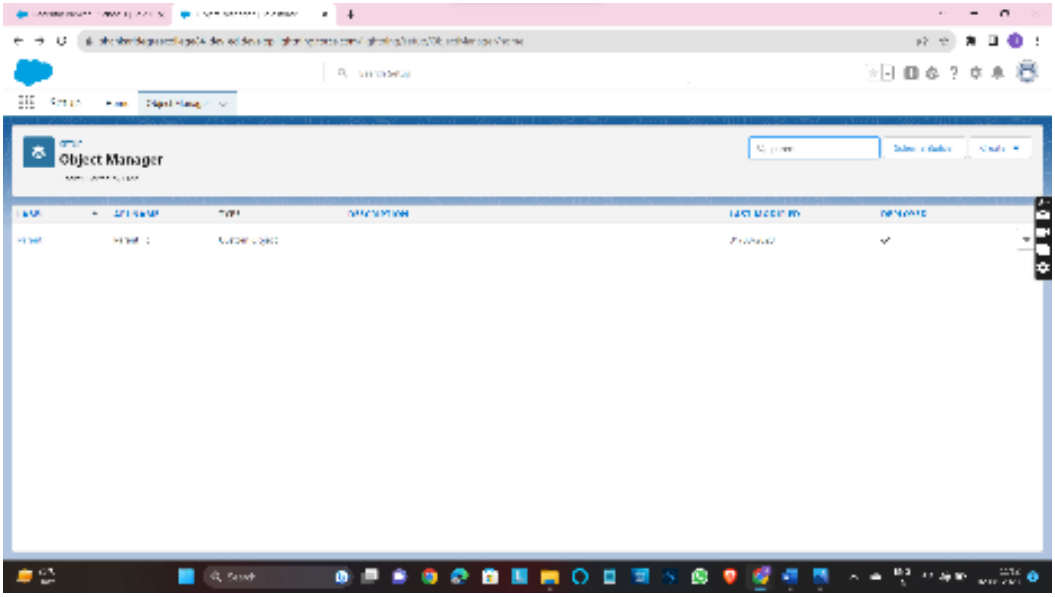
- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Our project is to create an application for school management. We have created four custom objects named SCHOOL , STUDENT, PARENT. And also the tabs for that object.




Object Manager


Object Manager

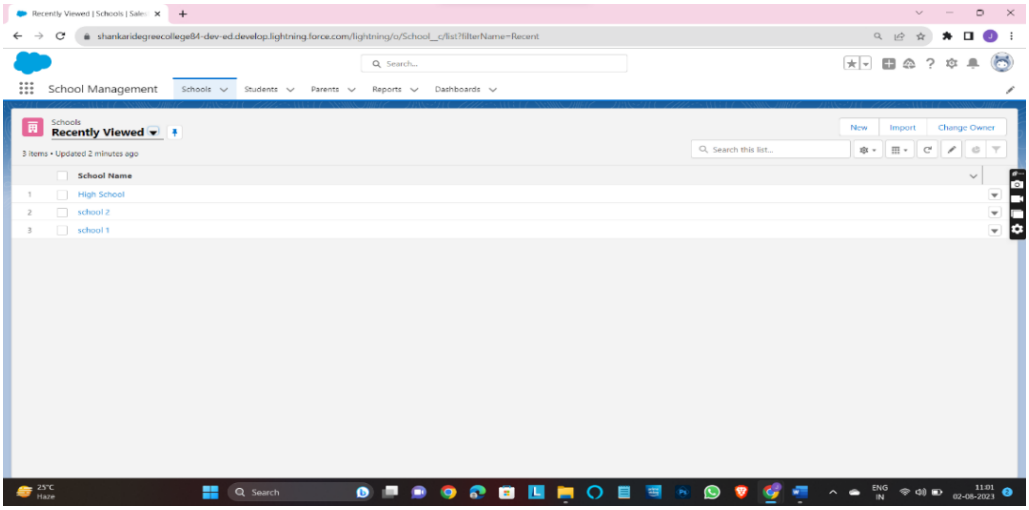
Lightning App

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 -

1. 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.
2. Note: The description, Logo, and Label of standard app cannot be altered.
3. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.
4. Note: Logos for Custom Apps can be changed.

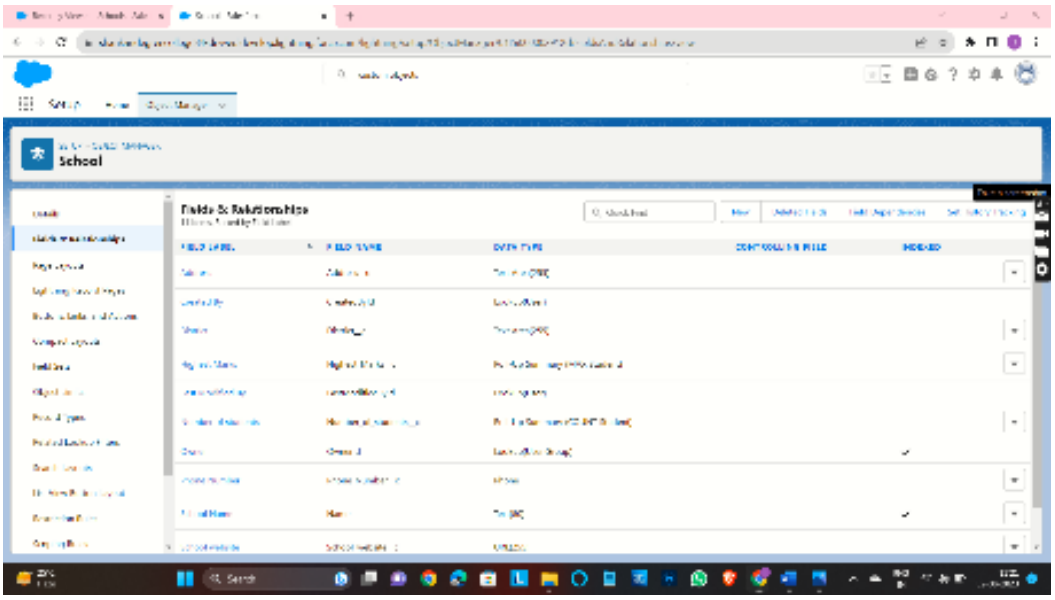
After the creation of required objects we have created the **Lightning App** named as SCHOOL MANAGEMENT APP by the help of App Manager in the salesforce org and added the tabs of the three objects in the app in standard navigation formate.

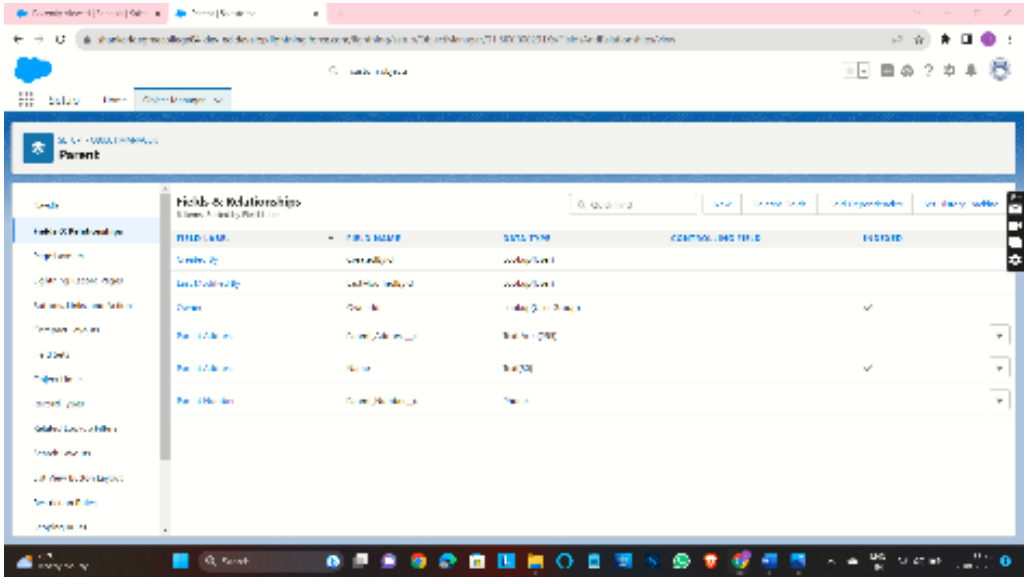


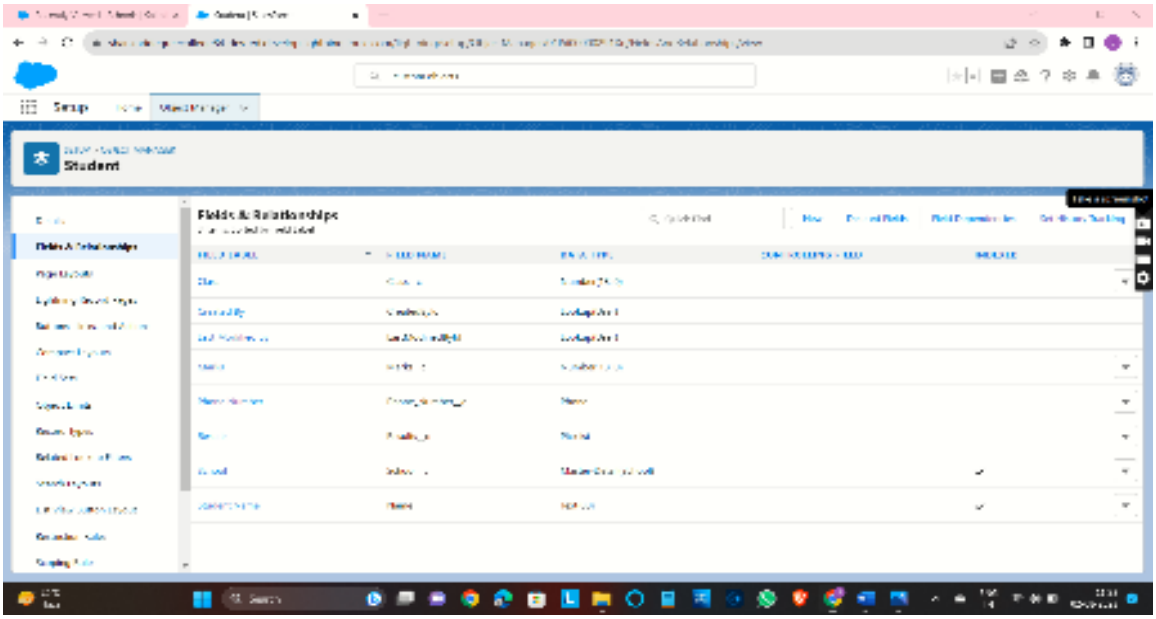
Fields And Relationship

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.

After the creation of the App we have created the fields and relation ships for the three objects.



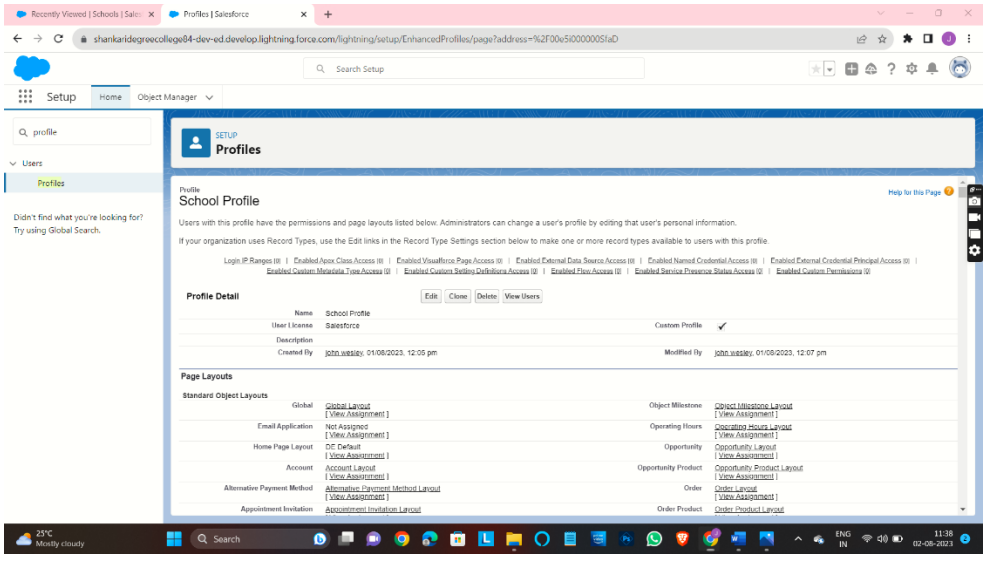




Profile

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

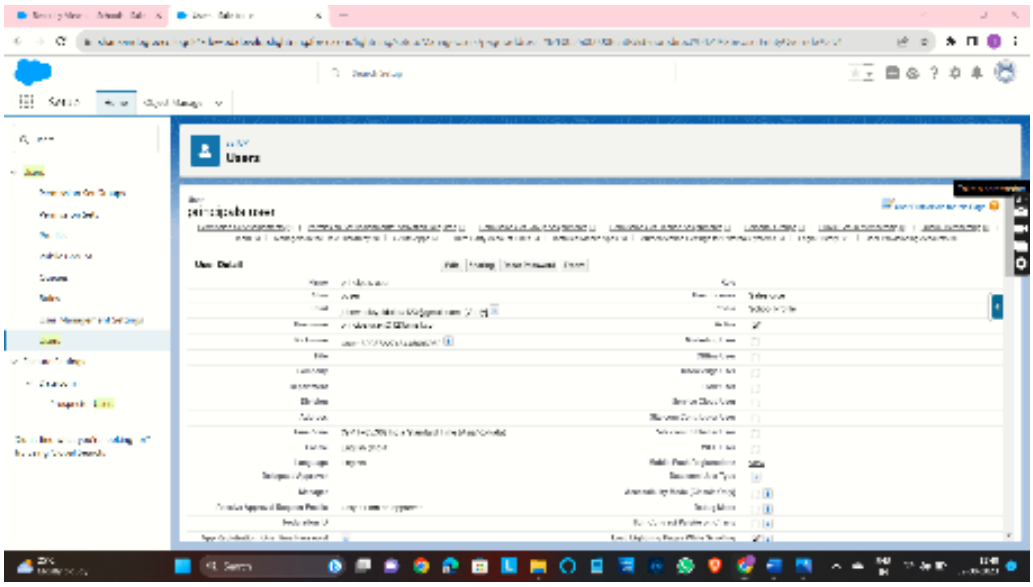
We have created the a profile named as SCHOOL PROFILE by cloning the STANDARD USER PROFILE which licence is salesforce. The salesforce licence have only limit of 2 users. Which means only two users can be active at a time in the org.

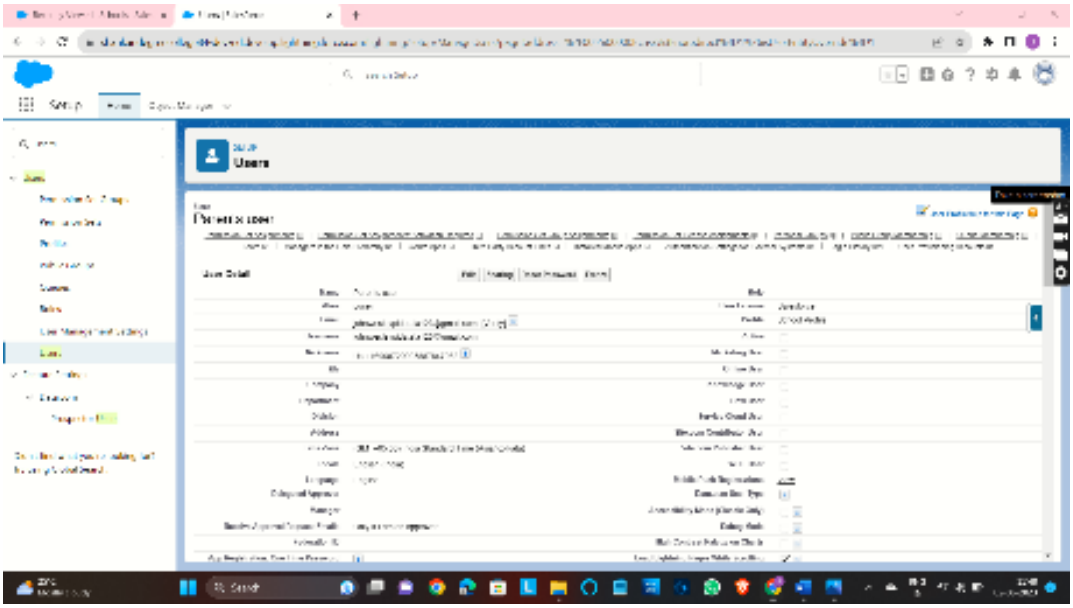


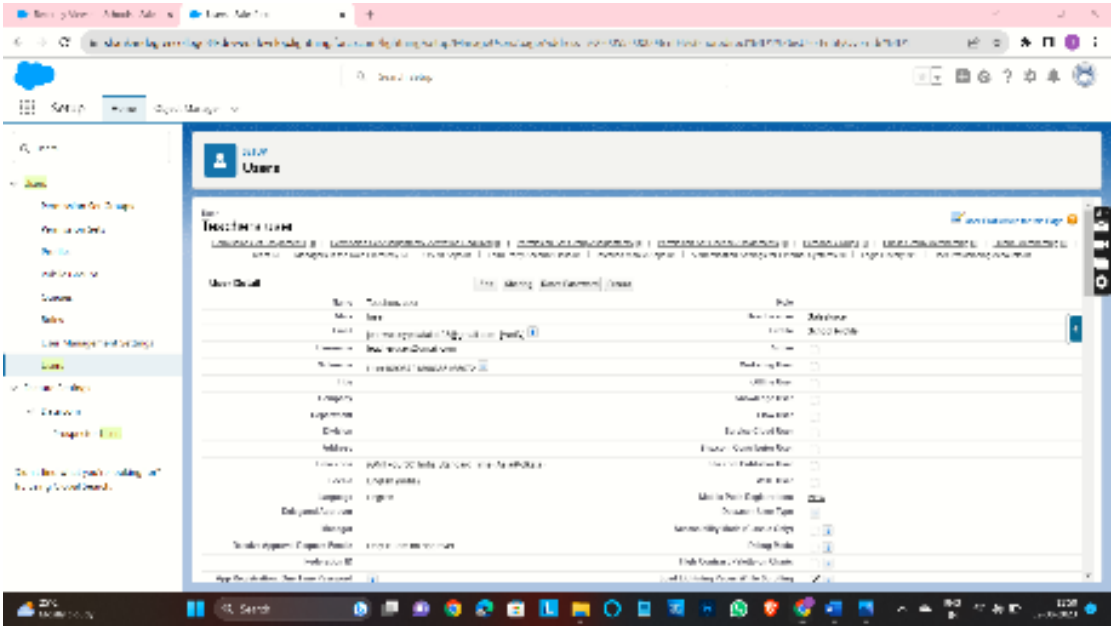
Users

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.

In order to assign the profile to the user we have created three users. They are TEACHERS, PRINCIPALS, PARENTS.







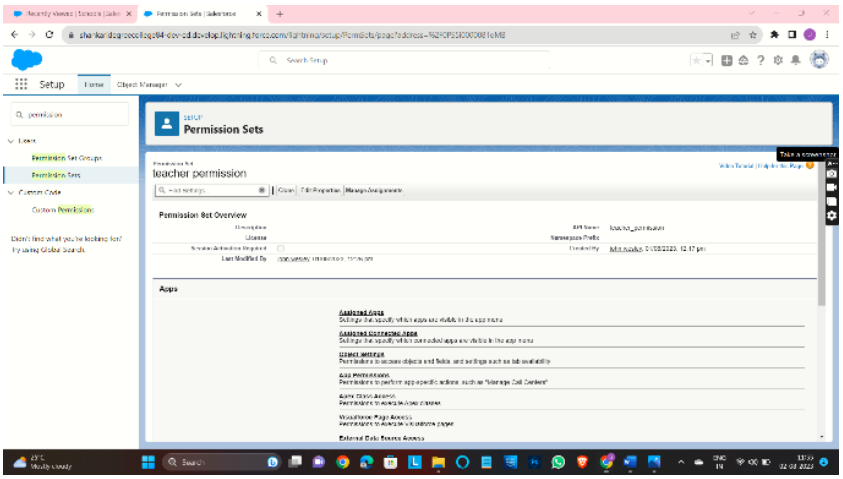
Permission Sets

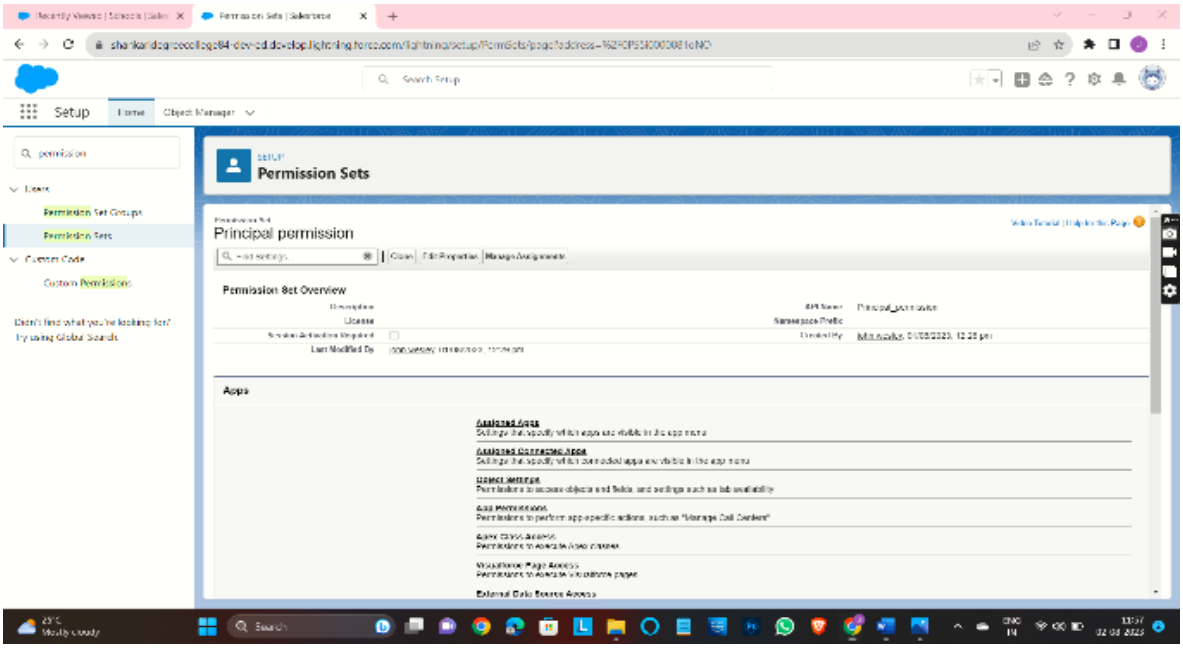
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

We have created to permission sets. They are :

1. Teacher permission set
2. Principal permission set

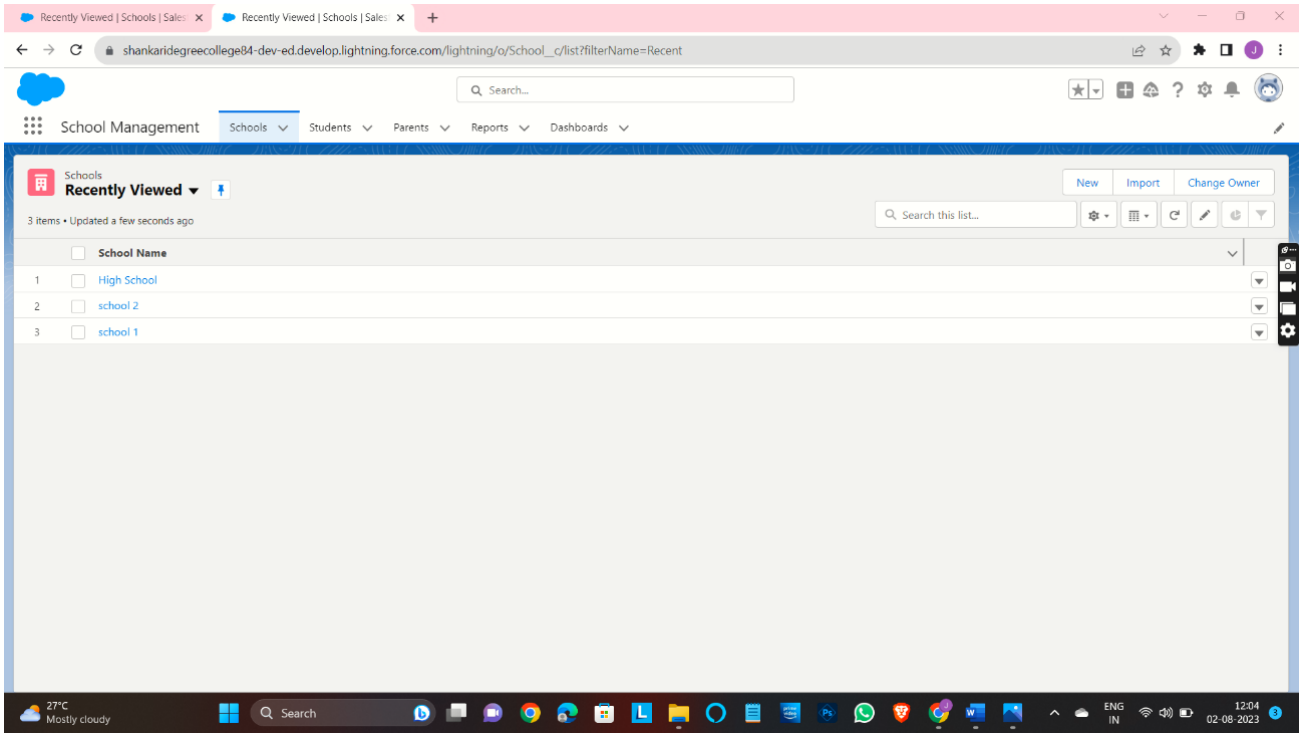
and assigned them with TEACHER USER and PRINCIPAL USER. We gave the view all, create, edit permissions to the three custom objects for teacher permission set and entire permissions to the principal permission set.





Create Record (School)

We have created some records on school tab.



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:

1.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.

2. Summary Reports:

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

3.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.

4.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 subreport 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.

Note: Standard report types always have inner joins.

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:

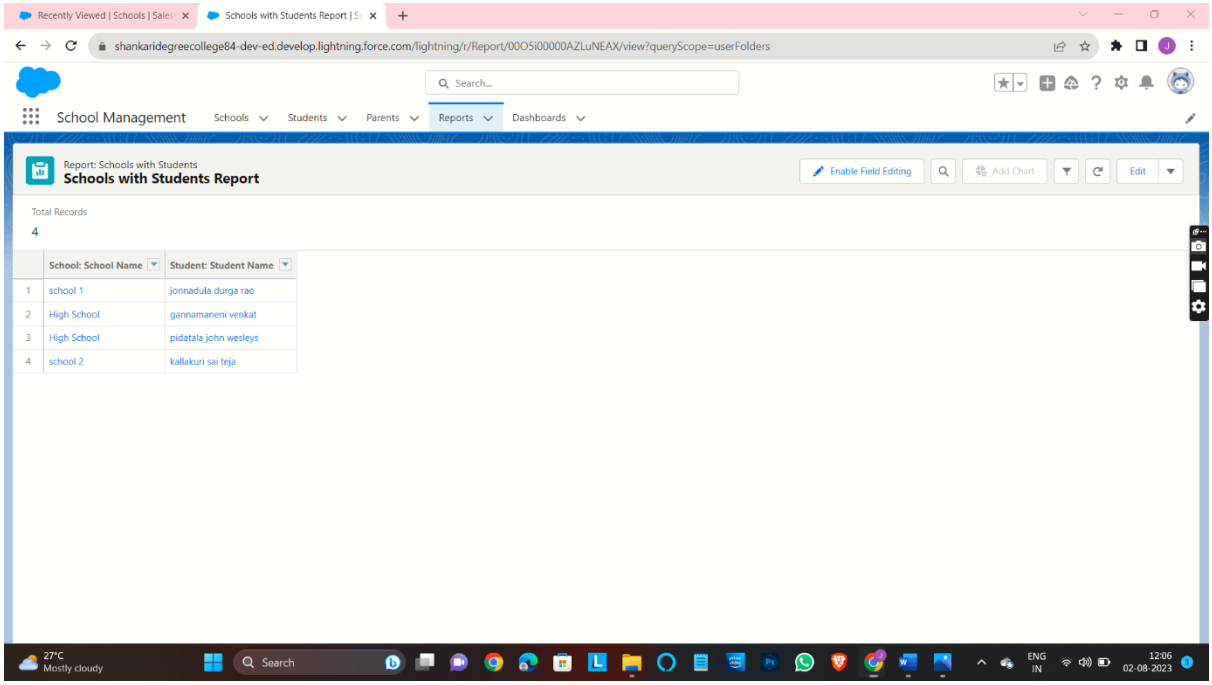
With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

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.

We have created a report on SCHOOLS WITH STUDENT REPORT.



This is all about our project on CREATION OF AN APPLICATION FOR STUDENT MANAGEMENT- ADMIN.

TEAM MEMBERS :

Team ID : LTVIP2023TMID01205

1. **PIDATALA JOHN WESLEY (team leader)**
2. **JONNADULA DURGA RAO**
3. **GANNAMANENI VENKAT CHOWDHARY**
4. **KALLAKURI SAI TEJA**

TRAILHEAD URLS OF TEAM :

JOHN WESLEY- https://www.salesforce.com/trailblazer/john-123

DURGA RAO- https://trailblazer.me/id/durao8

SAI TEJA- https://trailblazer.me/id/saeja8

VENKAT- https://www.salesforce.com/trailblazer/venkat15