

# NAAN MUDHALVAN

## SALESFORCE PROJECT REPORT

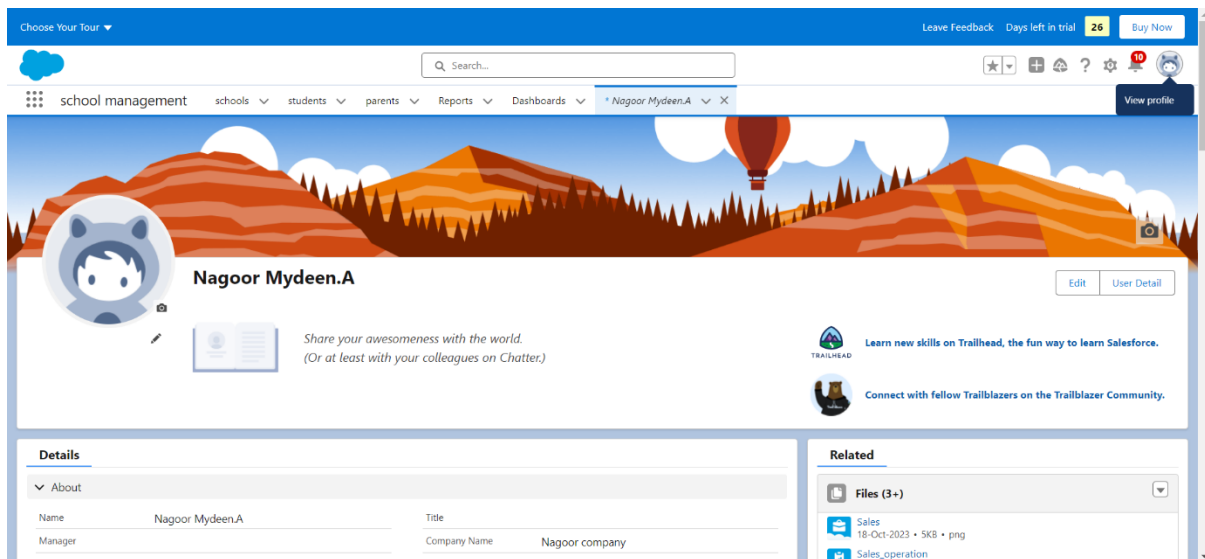
COLLEGE: **SCAD COLLEGE OF ENGINEERING AND TECHNOLOGY**

TITTLE: **Creation of an Application for school Management**

BATCH-10

NAME	NM ID	REG NO
MASHAL P.M	D12C20007D7AF20921F45C2945556760	952820114330
RIZWAN MYDEEN K	ACA4EBDC090ED6FA90847D8C62E78157	952820114339
KHANSA RIYAS S	A0F4FA06CEAD96590EF491C6E694BFE9	952820114325
NAGOOR MYDEEN A	2ABE890ECF3124297674F6CBE9D8FB60	952820114341

## Step-1 :Create a Salesforce Account



The screenshot shows the Salesforce user profile for Nagoor Mydeen.A. The header includes navigation links like 'school management', 'schools', 'students', 'parents', 'Reports', and 'Dashboards'. The profile card displays the user's name, a profile picture, and a bio: 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. Below the profile card, the 'Details' section shows the user's name, title, and company name. The 'Related' section lists files associated with the user, including 'Sales' and 'Sales\_operation'.

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school management schools students parents Reports Dashboards \* Nagoor Mydeen.A X View profile

**Nagoor Mydeen.A** Edit User Detail

Share your awesomeness with the world.  
(Or at least with your colleagues on Chatter.)

Learn new skills on Trailhead, the fun way to learn Salesforce.

Connect with fellow Trailblazers on the Trailblazer Community.

**Details**

About

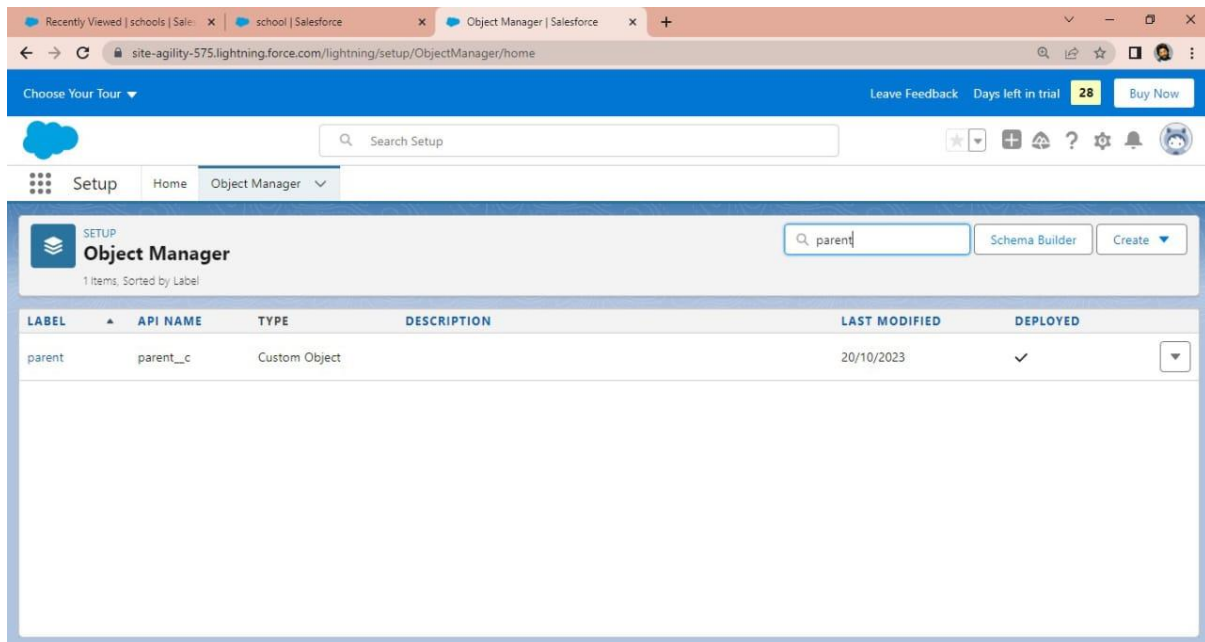
Name	Nagoor Mydeen.A	Title	
Manager		Company Name	Nagoor company

**Related**

Files (3+)

- Sales 18-Oct-2023 • 5KB • png
- Sales\_operation

## Step-2: Create the Object (School,Student,Parent)



The screenshot shows the Salesforce Object Manager interface. The header includes navigation links like 'Setup', 'Home', and 'Object Manager'. The main content area displays a table of objects, with one object listed: 'parent' with API name 'parent\_c' and type 'Custom Object'. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'.

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Search Setup

Setup Home Object Manager ▾

**Object Manager** 1 items, Sorted by Label

parent\_c Schema Builder Create ▾

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
parent	parent_c	Custom Object		20/10/2023	✓

Recently Viewed | schools | Sale... x | school | Salesforce x | Object Manager | Salesforce x | +

site-agility-575.lightning.force.com/lightning/setup/ObjectManager/home

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Setup Home Object Manager ▾

SETUP  
**Object Manager**  
1 items, Sorted by Label

school school\_c Custom Object 20/10/2023 ✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
school	school_c	Custom Object		20/10/2023	✓

Recently Viewed | schools | Sale... x | school | Salesforce x | Object Manager | Salesforce x | +

site-agility-575.lightning.force.com/lightning/setup/ObjectManager/home

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Search Setup

Setup Home Object Manager ▾

SETUP  
**Object Manager**  
1 items, Sorted by Label

student student\_c Custom Object 20/10/2023 ✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
student	student_c	Custom Object		20/10/2023	✓

### Step 3 : Create Fields for respective objects(School , Student , Parents)

The screenshot shows the Salesforce Setup interface for the 'student' object. The 'Fields & Relationships' section is active, displaying a table of 9 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Class, Created By, Email, Last Modified By, Marks, Phone Number, Results, school, and student Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
school	school__c	Master-Detail(school)		✓
student Name	Name	Text(80)		✓

The screenshot shows the Salesforce Setup interface for the 'parent' object. The 'Fields & Relationships' section is active, displaying a table of 6 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Created By, Last Modified By, Owner, Parent Address, parent Name, and Parent Number.

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

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Setup Home Object Manager ▾

SETUP > OBJECT MANAGER school

Details

**Fields & Relationships**  
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedBy	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX student)		
Last Modified By	LastModifiedBy	Lookup(User)		
Number of Student	Number_of_Student__c	Roll-Up Summary (COUNT student)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
school Name	Name	Text(80)		✓

90°F Haze Search ENG IN 5:17 PM 10/20/2023

New parent | Salesforce

site-agility-575.lightning.force.com/lightning/o/parent\_\_c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=1...

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school management schools ▾ students ▾ parents ▾ Reports ▾ Dashboards ▾

parents Recently Viewed 0 items • Sorted by parent Name ▾

parent Name ▾

**New parent**

\* = Required Information

Information

\* parent Name  Owner Lawrance Victor

Parent Address

Parent Number

Cancel Save & New Save



New student | Salesforce

site-agility-575.lightning.force.com/lightning/o/student\_c/new?count=5&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=...

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### New student

\* = Required Information

Information

\*student Name

Phone Number

Email

\*school

Results

Class

Marks

Cancel Save & New Save

New school | Salesforce

site-agility-575.lightning.force.com/lightning/o/school\_c/new?count=4&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=1...

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### New school

\* = Required Information

Information

\*school Name

Address

District

State

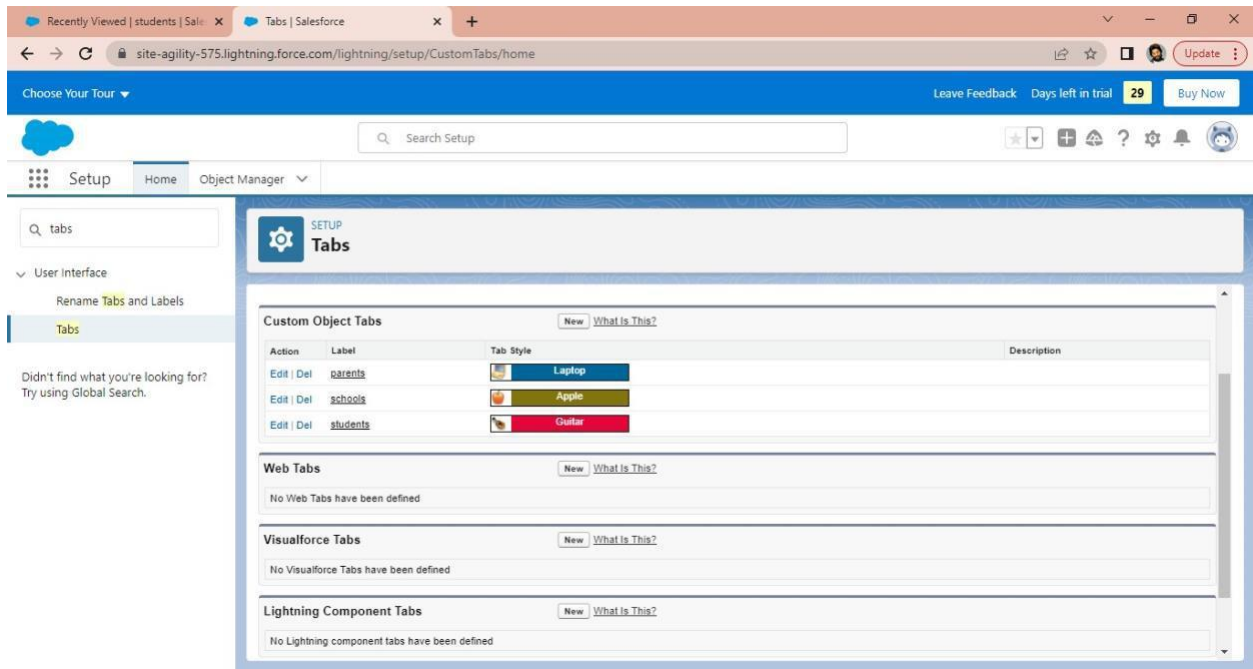
Phone Number

School Website

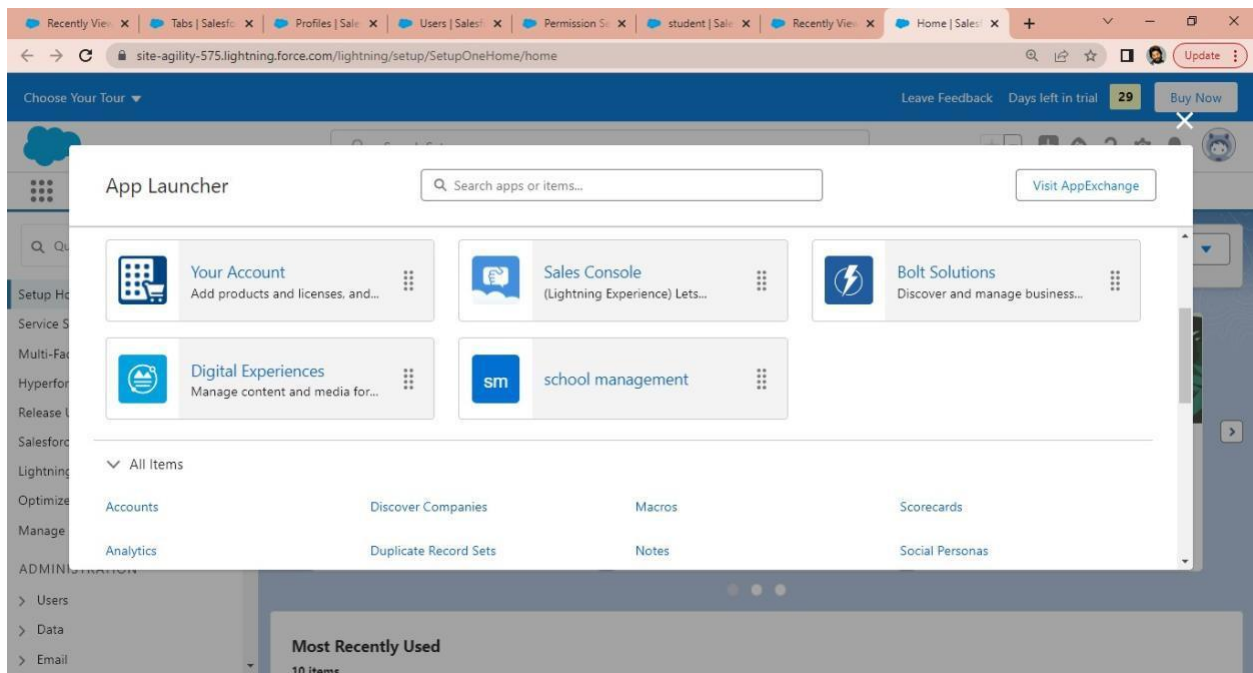
Owner Lawrance Victor

Cancel Save & New Save

## Step 4 : Create the Tabs for each object(School, student, Parent)



## Step 5 : Create a Lightning App





## Step 6 : Create the School Profile

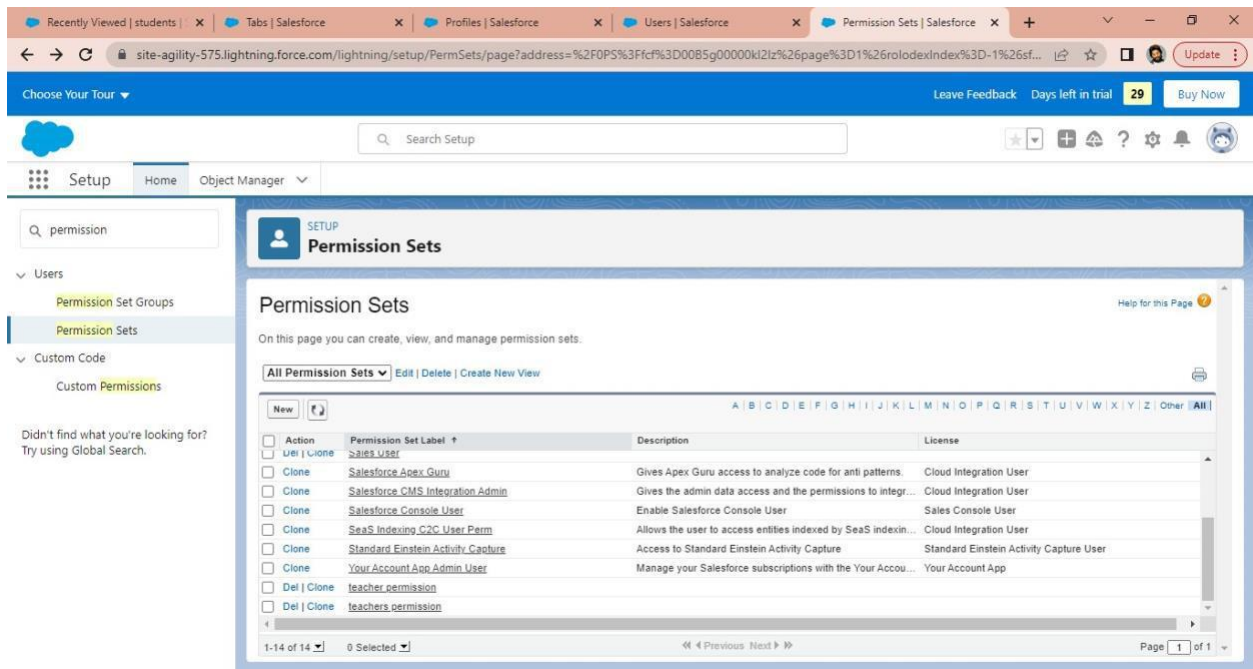
The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar shows 'Setup' > 'Profiles' under the 'Users' section. The main content area is titled 'School profile' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this, there are links for 'Login IP Ranges', 'Enabled Custom Metadata Type Access', and 'Enabled Custom Setting Definitions Access'. The 'Profile Detail' section shows the profile name 'School profile', user license 'Chatter Free', and a 'Custom Profile' checkbox that is checked. It also shows the creator 'Laurance Victor' and the creation date '20/10/2023, 2:31 pm'. The 'Connected App Access' section shows 'CPQ Integration User Connected App' with a checkbox. The 'Service Provider Access' and 'Administrative Permissions' sections are also visible.

## Step 7 : Create the users(Teacher , Parent , Principal)

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar shows 'Setup' > 'Users' under the 'Users' section. The main content area is titled 'All Users' and includes a description: 'On this page you can create, view, and manage users. To get more licenses, use the Your Account app. Let's Go'. Below this, there is a 'View' dropdown set to 'All Users' and a link to 'Create New User'. A table of users is displayed with columns: Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The table contains six rows of user data.

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chath.00d59000000kmbheal.kfh49h2iq@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Parent	pare	laurance72@gmail.com	20/10/2023, 3:00 pm		<input type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	Principals	prin	khore@gmail.com			<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	Sponsor Exec	esoon	execsponsord4mfunnvop49.mblvylucisk0.houicavewdv@example.com			<input type="checkbox"/>	End User
<input type="checkbox"/> Edit	Teachers	teac	mmprince4508@gmail.com			<input type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	Victor Laurance	LVid	laurance72-136@force.com	20/10/2023, 7:09 pm		<input checked="" type="checkbox"/>	System Administrator

## Step 8 : Create the Permission Set for the User's

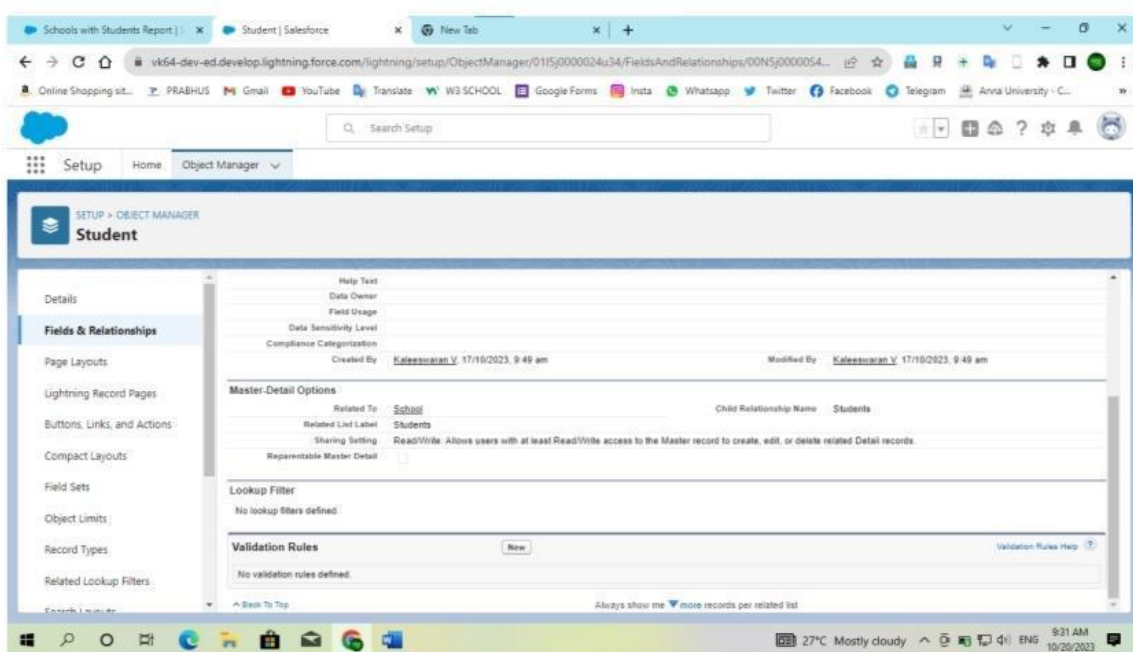


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "permission" entered. Under the "Users" section, "Permission Set Groups" and "Permission Sets" are visible. The main content area is titled "Permission Sets" and includes a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. The following table represents the data shown in the screenshot:

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Sales User		
<input type="checkbox"/> Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integr...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexin...	Cloud Integration User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/> Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Accou...	Your Account App
<input type="checkbox"/> Del   Clone	teacher.permission		
<input type="checkbox"/> Del   Clone	teachers.permission		

At the bottom of the table, it says "1-14 of 14" and "0 Selected".

## Step 9 : Create Master Detail relationship

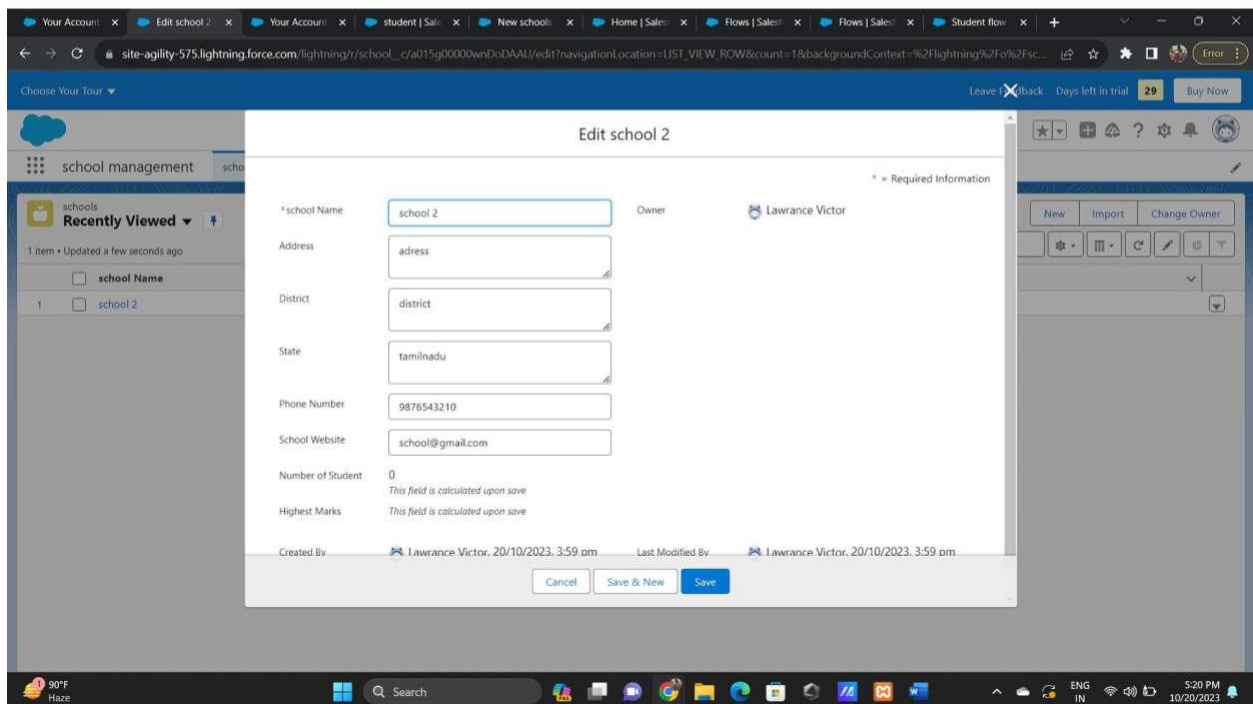
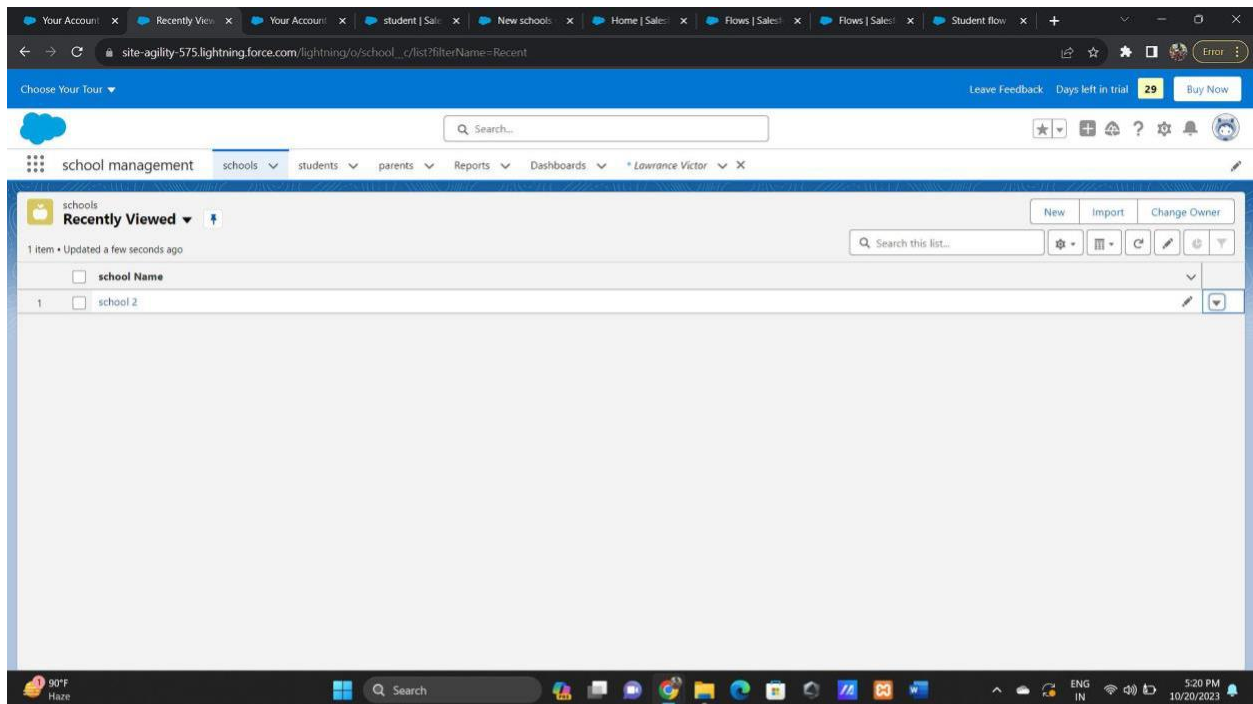


The screenshot shows the Salesforce Object Manager for the "Student" object. The left sidebar has a search bar with "permission" entered. Under the "Users" section, "Permission Set Groups" and "Permission Sets" are visible. The main content area is titled "Student" and includes a table of existing permission sets. The following table represents the data shown in the screenshot:

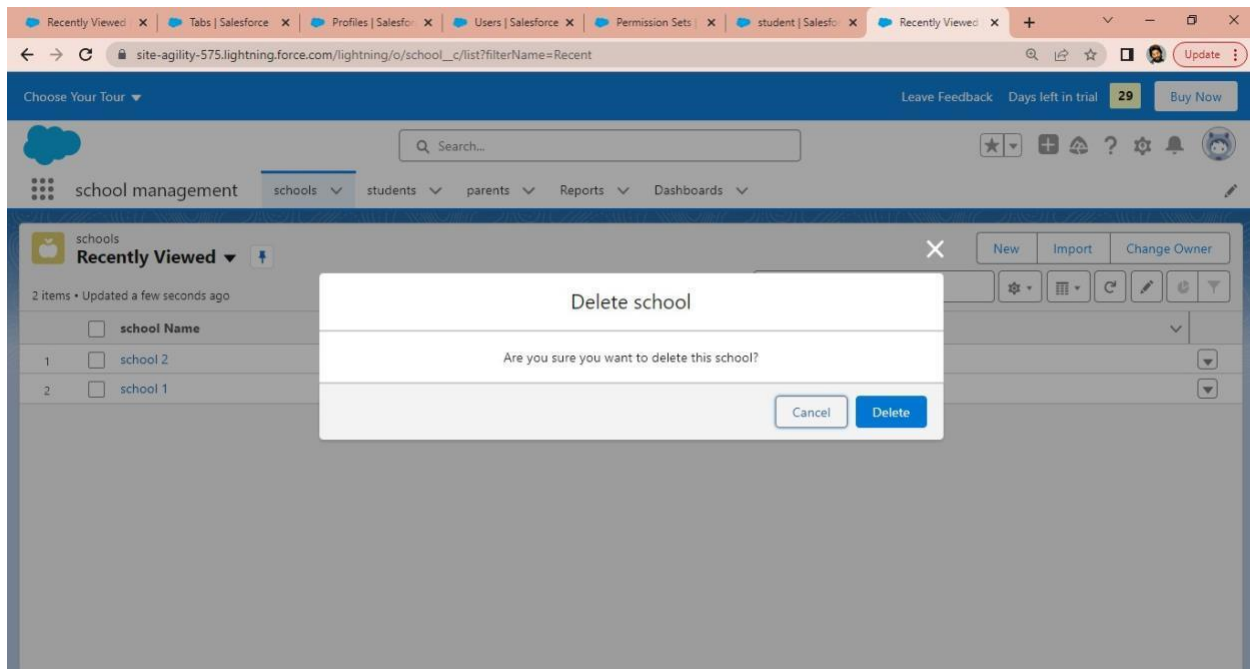
Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Sales User		
<input type="checkbox"/> Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integr...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexin...	Cloud Integration User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/> Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Accou...	Your Account App
<input type="checkbox"/> Del   Clone	teacher.permission		
<input type="checkbox"/> Del   Clone	teachers.permission		

At the bottom of the table, it says "1-14 of 14" and "0 Selected".

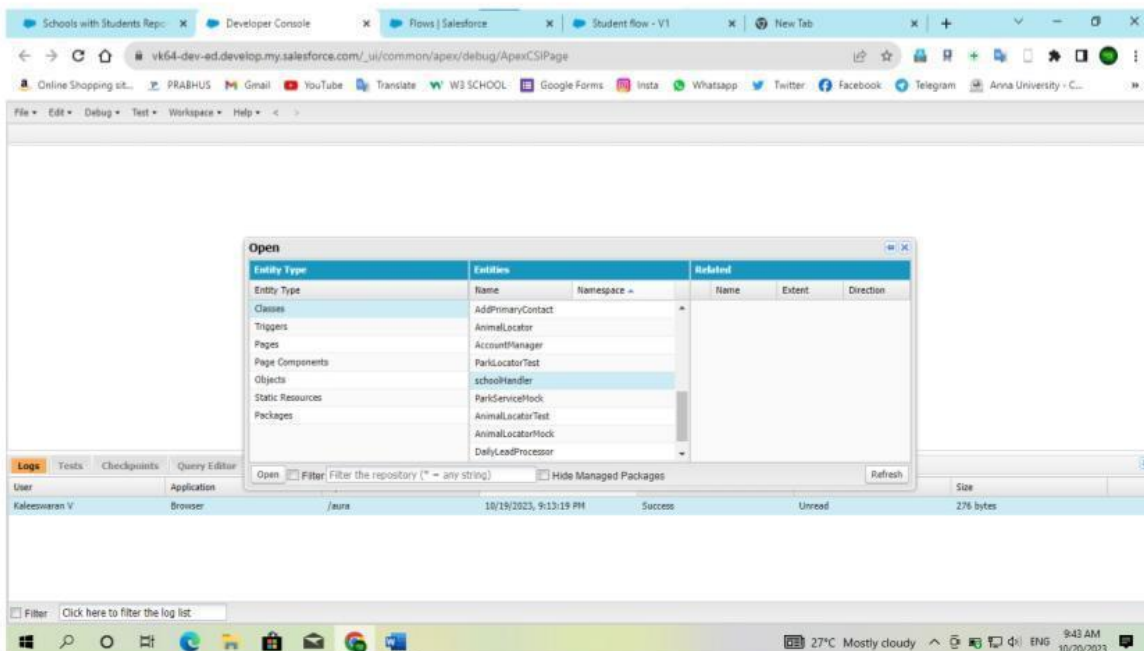
## Step 10 : Create Records in Lightning App

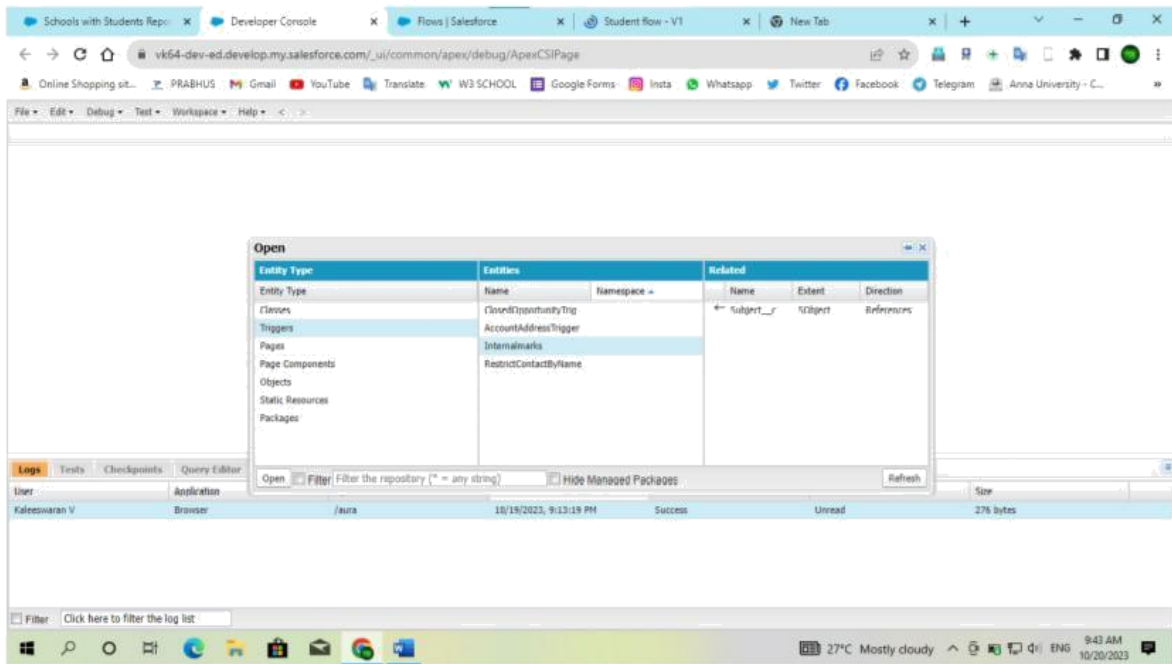


## Step 11 : Deleting Records

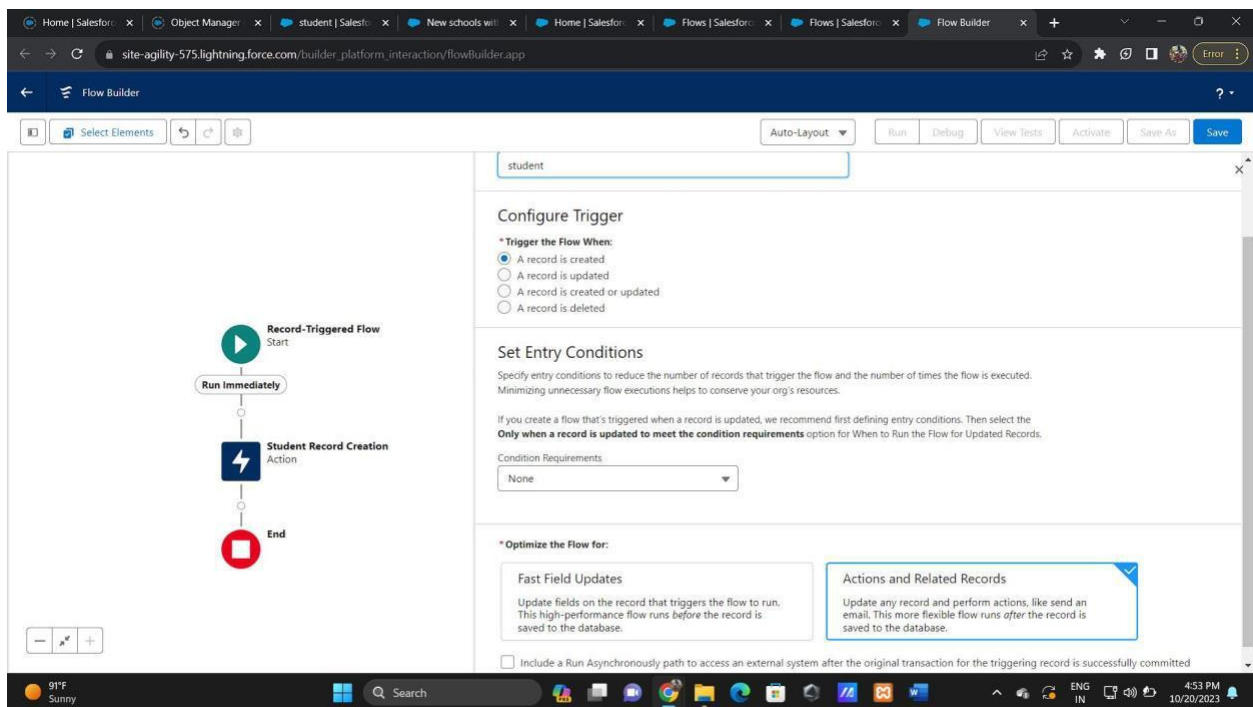


## Step 12 : Create Apex Class and Apex Trigger





## Step 13 : Create A Flow



## Step 14 : Create Reports

The screenshot displays a Salesforce interface with a report titled "New schools with students Report". The report is currently empty, showing "Total Records: 0". The interface includes a navigation bar with tabs for "school management", "schools", "students", "parents", "Reports", and "Dashboards". The "Reports" tab is active. The report header shows "Report: schools with students" and "New schools with students Report". The report body contains a large illustration of a desert landscape with a cactus, mountains, and a sun. Below the illustration, the text "No Results" is displayed. The bottom of the report shows a summary bar with "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are currently disabled (indicated by greyed-out checkboxes).

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Search...

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Report: schools with students  
**New schools with students Report**

Enable Field Editing Add Chart Edit ▾

Total Records  
0

No Results

Row Counts ☐ Detail Rows ☐ Subtotals ☐ Grand Total ☐