

Project Report

Creation of An Application for School Management – Admin

- Introduction:

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

1.1 Creating a developer org in salesforce

- Go to developer.salesforce.com
- Click on sign up.
- On the sign - up form, enter the following details

- a. First name & Last name - Purushotham & Eediga
- b. Email - eedigapurushotham11@gmail.com
- c. Role - Developer
- d. Company - College Name - Gayatri Degree & PG College
- e. Country - India
- f. Postal Code - 517501
- g. Username - purushotham2002@gdc.com

- Objects – School, Student & Parent

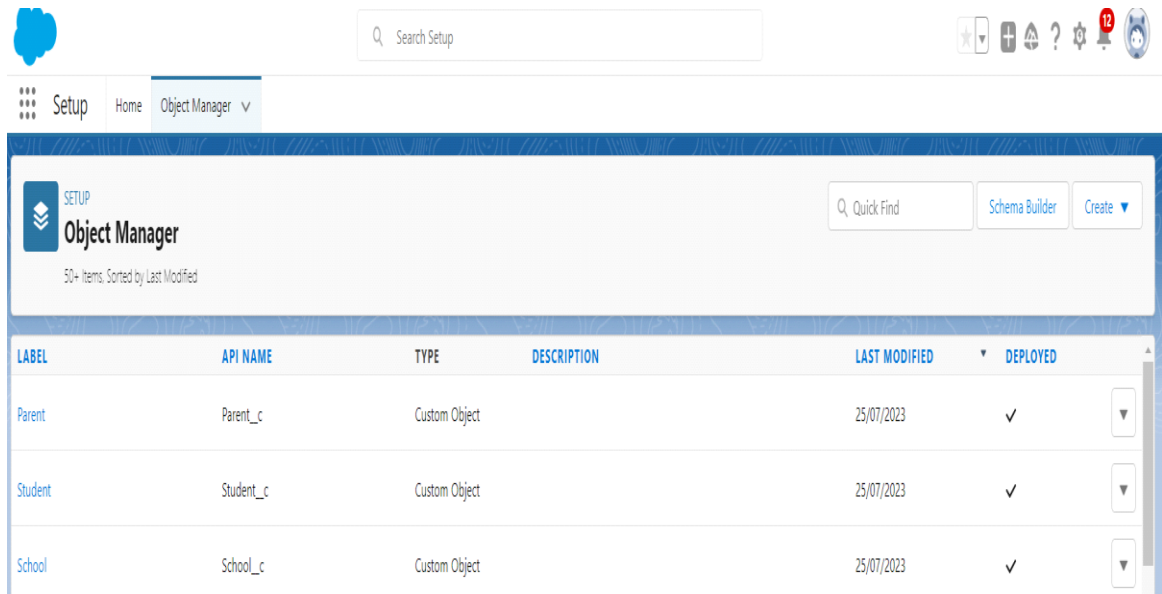
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

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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.

Creation of objects for School Management App

For this school management we need to create 3 objects – School, Student and Parent



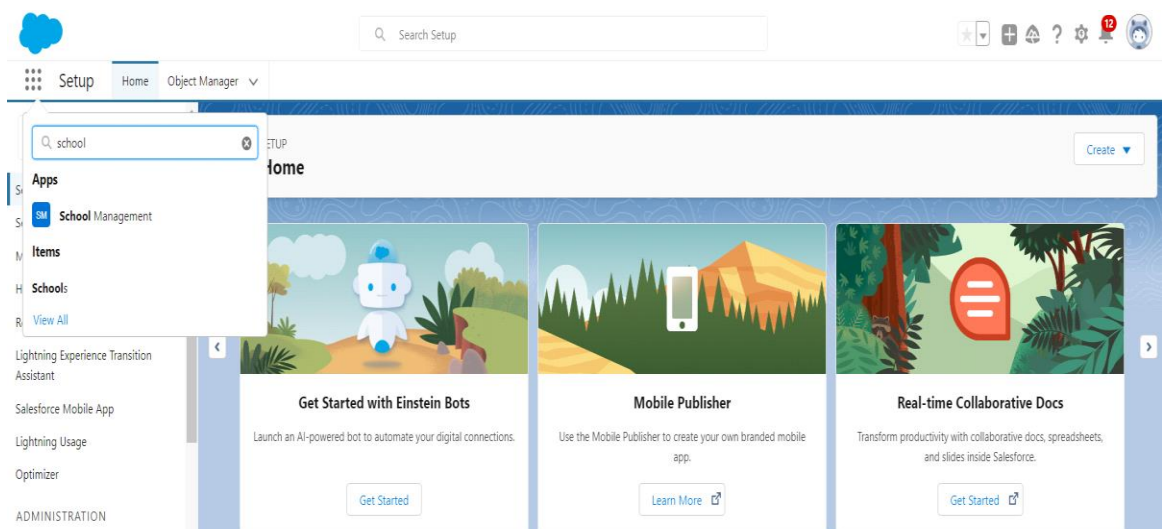
The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main header displays the 'Object Manager' title and a search bar. Below the header, a table lists three custom objects: Parent, Student, and School. Each row includes columns for Label, API Name, Type, Description, Last Modified, and Deployed status. The 'Parent' object is highlighted in blue.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent_c	Custom Object		25/07/2023	✓
Student	Student_c	Custom Object		25/07/2023	✓
School	School_c	Custom Object		25/07/2023	✓

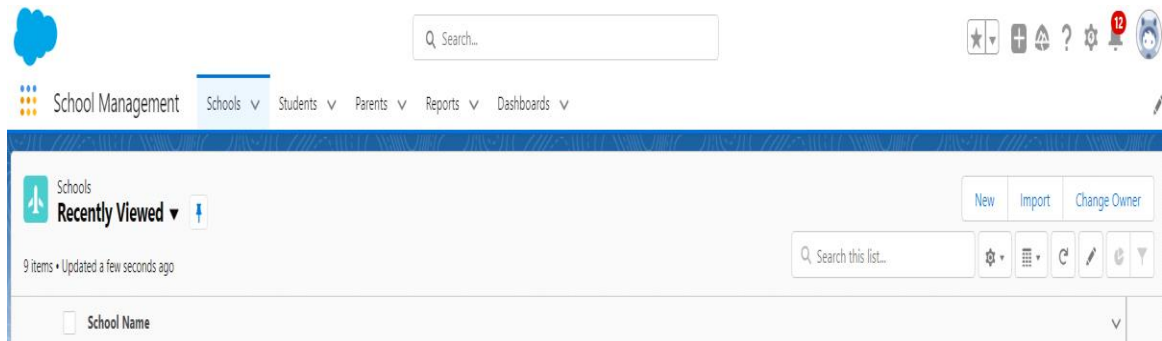
- **Lightning App:**

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.

Create the School Management App



- Click App Launcher, Search School Management and Click on it
We can see the lightning app

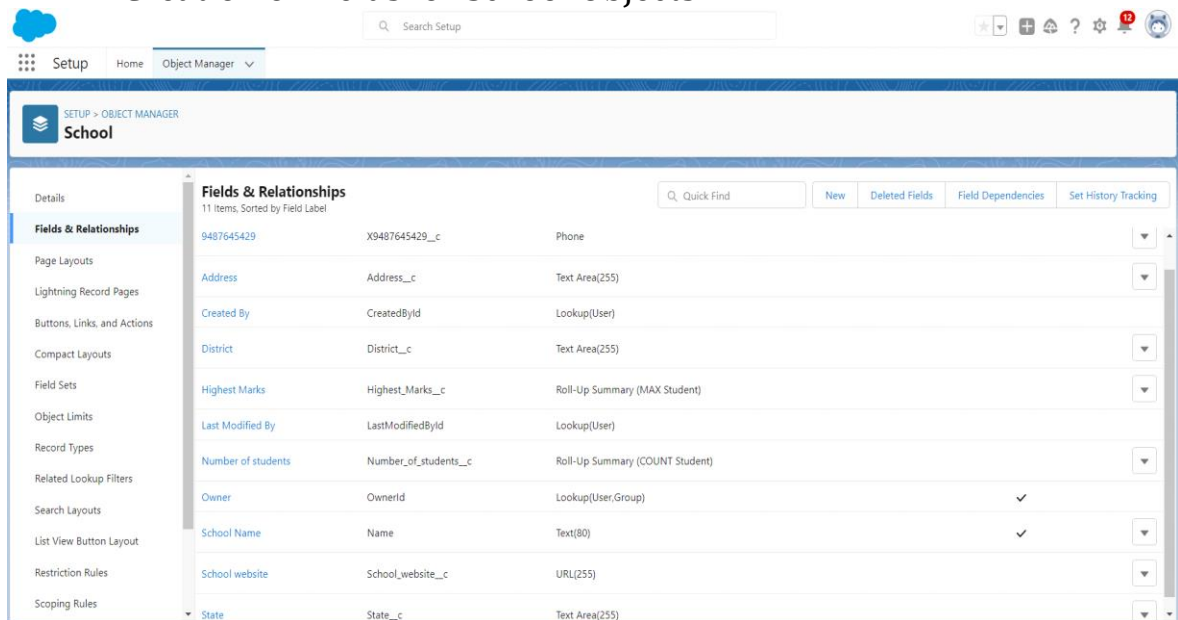


- Fields And Relationships:

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Here we need to create Various Fields for School, Student & Parent Objects.

Creation of Fields for School Objects:



Creation of Fields for Student Objects:

The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' tab is active, displaying a list of 8 fields. The left sidebar contains navigation links: 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, and List View Button Layout. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The top right corner has a search bar and various utility icons.

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

Creation of Fields for Parent Objects

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' tab is active, displaying a list of 6 fields. The left sidebar contains navigation links: 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, and List View Button Layout. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The top right corner has a search bar and various utility icons.

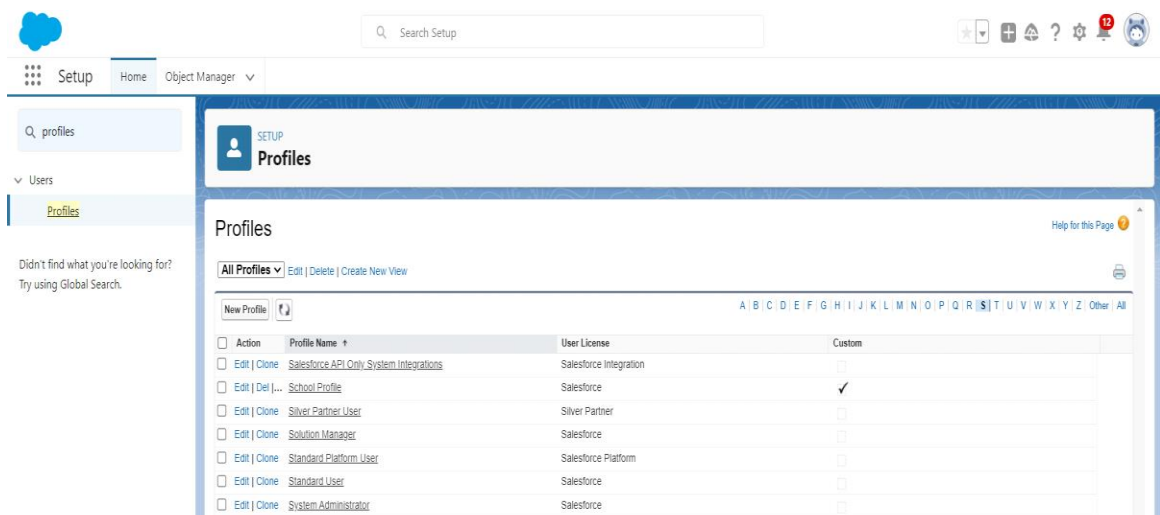
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

- Profiles:

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.

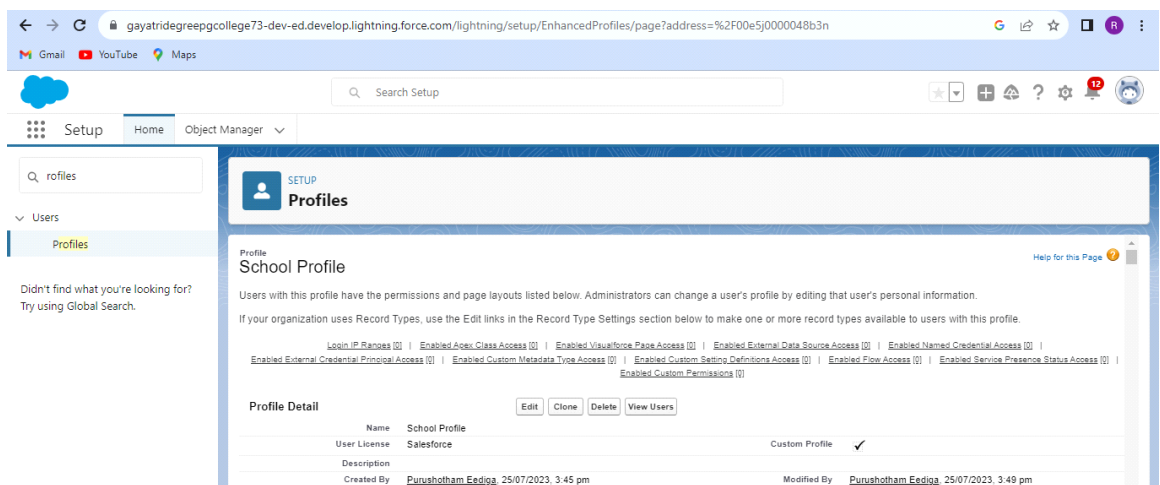
Here we are Creating a Profile named “School Profile” and giving access to all custom object permissions.

Creation on Profile:



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered. The main content area is titled 'Profiles' and shows a list of profiles. The 'School Profile' is highlighted in the list.

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Delete Clone	School Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>



The screenshot shows the Salesforce Setup interface with the 'School Profile' details. The browser address bar shows the URL: gayatridegreepcollege73-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j0000048b3n. The page title is 'School Profile'. Below the title, there is a description of the profile and a list of permissions. The 'Profile Detail' section shows the profile name, user license, and creation/modification dates.

Profile Detail

Name	User License	Custom Profile
School Profile	Salesforce	<input checked="" type="checkbox"/>

Created By: [Purushotham Eediga](#), 25/07/2023, 3:45 pm
Modified By: [Purushotham Eediga](#), 25/07/2023, 3:49 pm

- Users:

A user is anyone who logs in to Salesforce. Every user in Salesforce has a user account.

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

Here we Create three users – Parents, Principals and Teachers

Creating a User:

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Users' and shows a list of all users. The list includes columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The users listed are Chatter, Eediga_Purushotham, Parents, Principals, Teachers, User_Integration, and User_Security. The 'Active' column shows checkmarks for all users. The 'Profile' column shows various roles like Chatter Free User, System Administrator, Standard Platform User, School Profile, and Analytics Cloud Integration User.

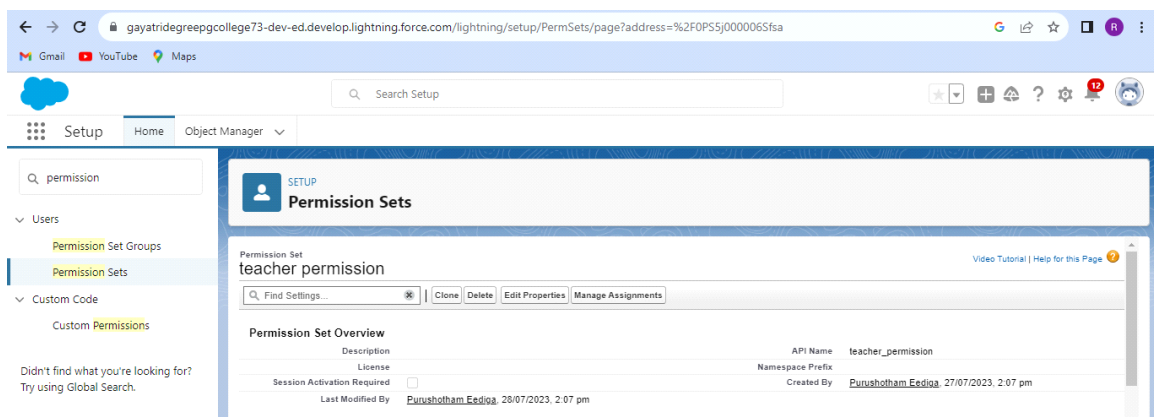
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Eveert	Chatter	chatter_00d5f0000c9oduea3_bonk9as4oa3h@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Eediga_Purushotham	PEdi	purushotham2002@gdc.com		✓	System Administrator
<input type="checkbox"/> Edit	Parents	pare	eedigapurushotham11@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Principals	prin	purushotham2002@gmail.com		✓	School Profile
<input type="checkbox"/> Edit	Teachers	teac	curi11@developer.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5f0000c9oduea3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5f0000c9oduea3.com		✓	Analytics Cloud Security User

- **Permission Sets:**

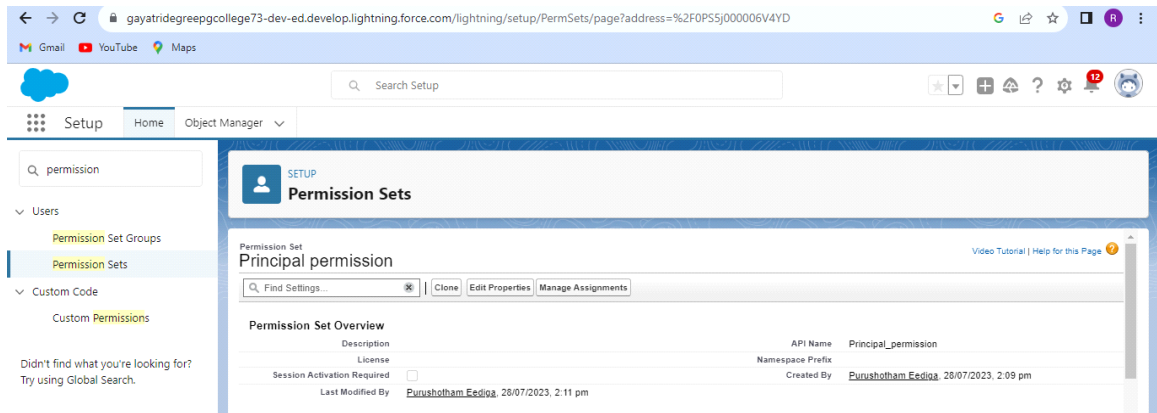
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Here we Created two permission sets which are Teacher Permission and Parent Permission

Permission sets 1:

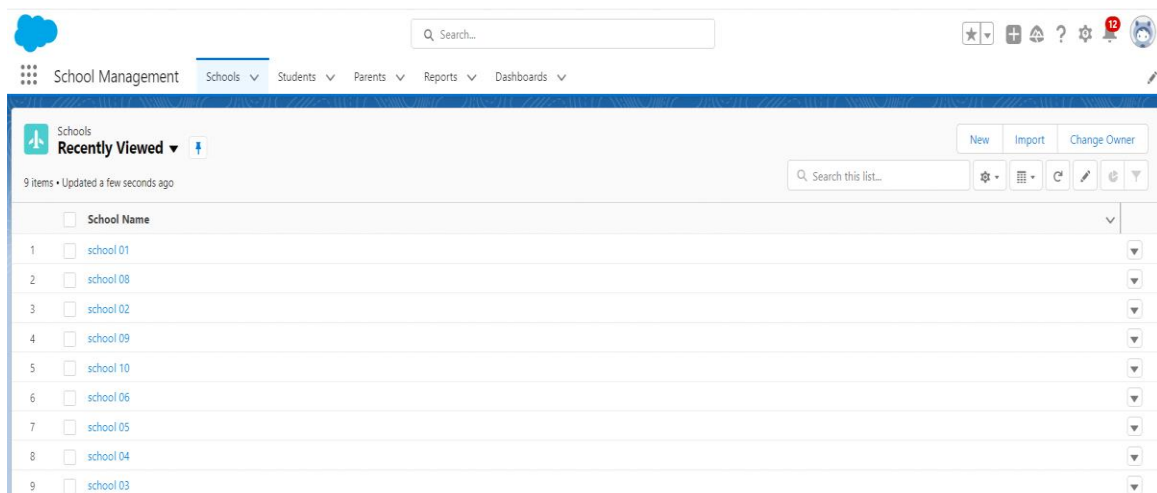


Permission Sets 2:



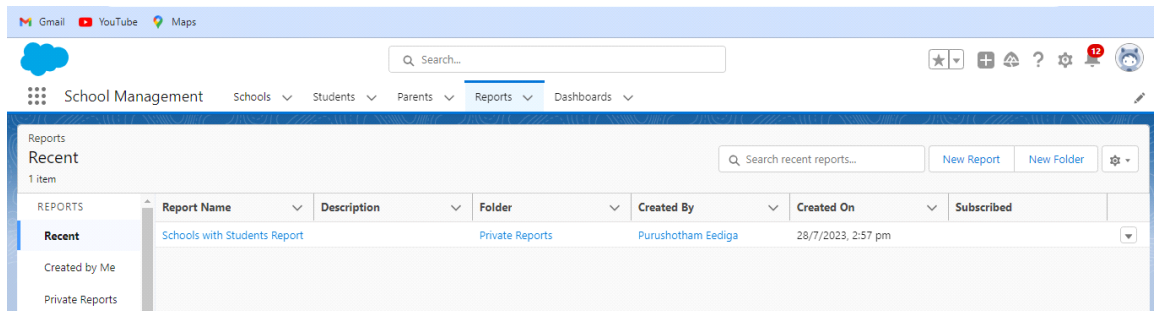
- User Adoption: Create, View & Delete Record

In User Adoption Milestone we create, View and delete records inside the School Management Lightning App. Here we can create as many records as we want for school. We can Customise these records accordingly.



- Reports: Create & View Report


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.









- From this milestone we are going to import the data and create reports, dashboards for data visualization in the application.

Tabular Report:

This is the basic report format. It just displays the records which we have created during this project. While easy to set up they can't be used to create groups of data or charts and cannot be used in Dashboards. They are mainly used to generate a simple list or a list with grand total.



Q Search...



School Management


Schools ▾

Students ▾

Parents ▾

Reports ▾

Dashboards ▾

 Report: Schools with Students

Schools with Students Report

Enable Field Editing

Q

Add Chart

▼

↺

Edit

▼

Total Records

9

	School: School Name ▾	Student: Student Name ▾
1	school 01	student 01
2	school 02	student 02
3	school 03	student 03
4	school 04	student 04
5	school 05	student 05
6	school 06	student 06
7	school 08	student 08
8	school 09	student 09
9	school 10	student 10