

Project Report

Creation of An Application for School Management – Admin

1. 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.

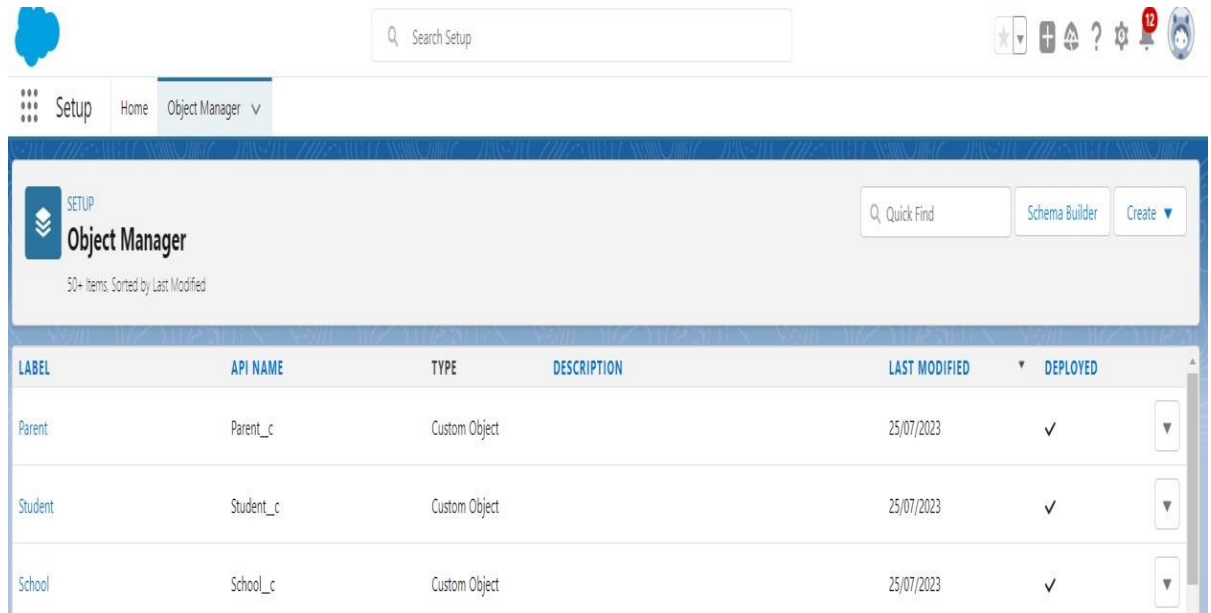
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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 - Lakshmi kumar & Meruva
 - b. Email - kumarmeruva49@gmail.com
 - c. Role - Developer
 - d. Company - College Name - Gayatri Degree & PG College
 - e. Country - India
 - f. Postal Code - 517501
 - g. Username - kumar69@salesforce.com

2. Objects – School, Student & Parent

For this school management we need to create 3 objects School, Parents and Student.

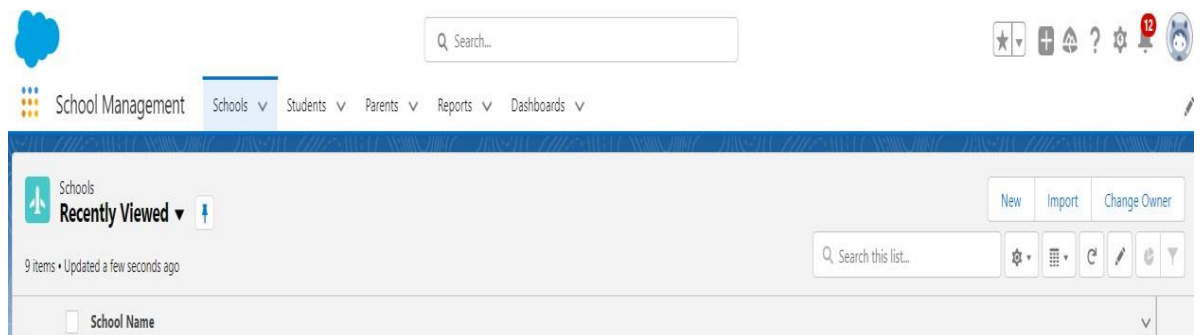


The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing "Home" and "Object Manager". The "Object Manager" page is displayed, featuring a header with the "Object Manager" title, a "Quick Find" search bar, and buttons for "Schema Builder" and "Create". Below the header, a table lists the objects created for the school management system.

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	✓

3. 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 screenshot shows the Salesforce Lightning App interface for "School Management". The top navigation bar includes the Salesforce logo, a search bar labeled "Search...", and several utility icons. Below the navigation bar, the "School Management" app is displayed, featuring a header with the "Schools" title, a "Recently Viewed" dropdown, and buttons for "New", "Import", and "Change Owner". Below the header, a table lists the schools created for the school management system.

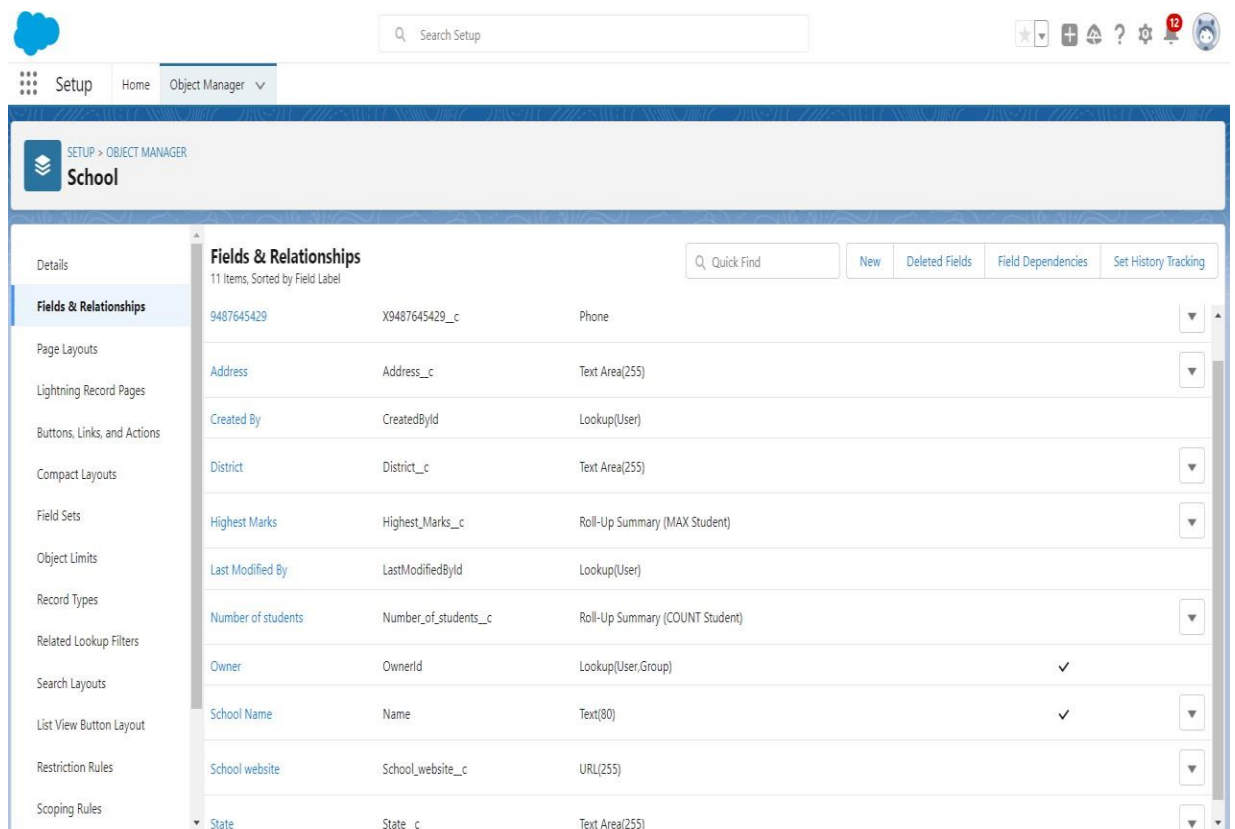
School Name

4. 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 Fields for School, Student & Parent Objects.

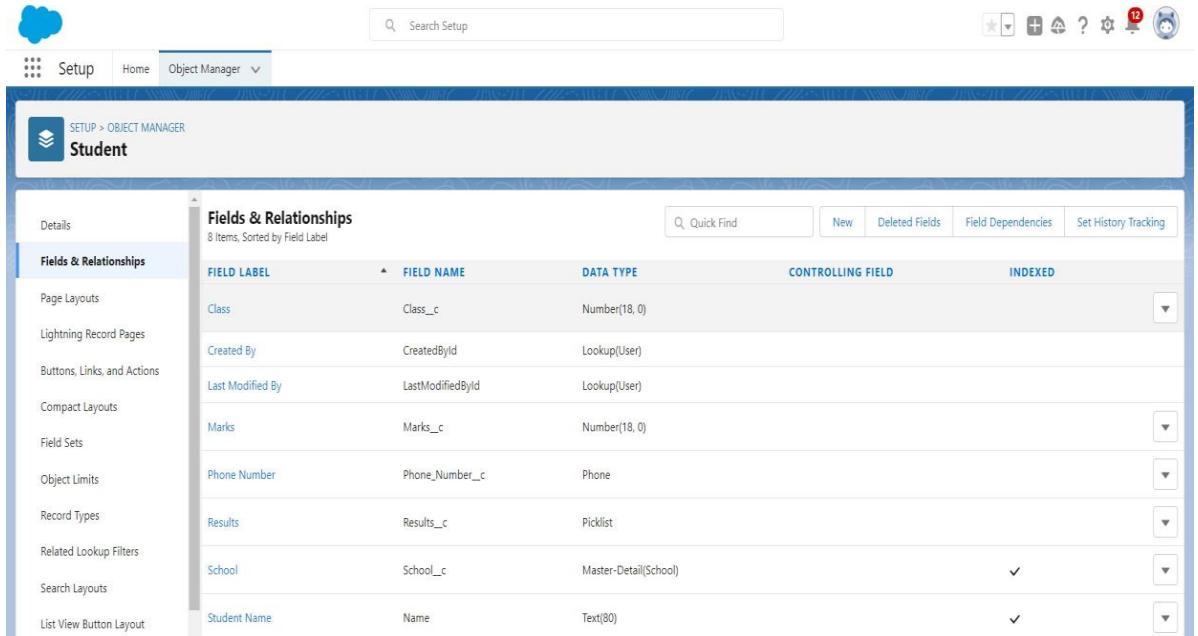
Creation of Fields for School Objects:



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 11 fields. The left sidebar contains a navigation menu with options like 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, and Scoping Rules. The main content area shows the following fields:

Field Name	Field Label	Field Type	Field Properties
9487645429	X9487645429_c	Phone	
Address	Address_c	Text Area(255)	
Created By	CreatedById	Lookup(User)	
District	District_c	Text Area(255)	
Highest Marks	Highest_Marks_c	Roll-Up Summary (MAX Student)	
Last Modified By	LastModifiedById	Lookup(User)	
Number of students	Number_of_students_c	Roll-Up Summary (COUNT Student)	
Owner	OwnerId	Lookup(User/Group)	✓
School Name	Name	Text(80)	✓
School website	School_website_c	URL(255)	
State	State_c	Text Area(255)	

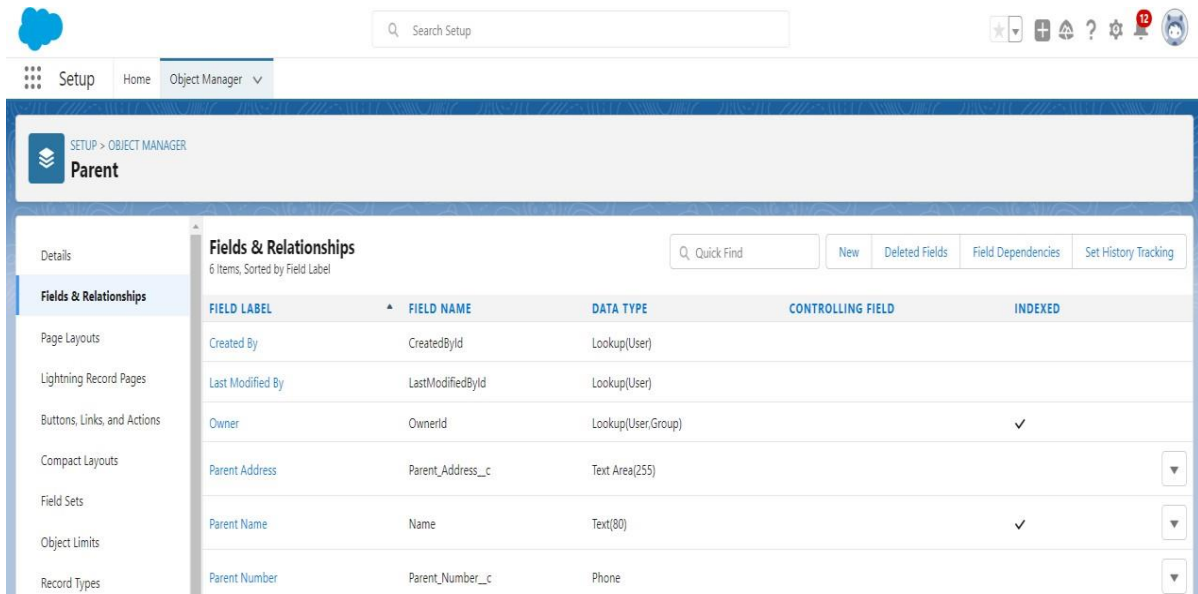
Creation of Fields for Student Objects:



The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Class, Created By, Last Modified By, Marks, Phone Number, Results, School, and Student Name. The 'School' and 'Student Name' fields are marked as indexed.

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' section is active, displaying a table of 6 fields. The table columns are 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. The 'Owner' and 'Parent Name' fields are marked as indexed.

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		

5. Profiles:

A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

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 existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The profiles listed are Salesforce API Only System Integrations, School Profile, Silver Partner User, Solution Manager, Standard Platform User, Standard User, and System Administrator.

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Del New	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"/>

6. Users:

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

Creating a User:

The screenshot shows the Salesforce Setup interface for the Users section. The left sidebar has a search bar with 'user' entered. The main content area is titled 'All Users' and shows a list of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed include yavvad, Chatter Expert, Gulson, Auggie, lakshmi kumar, mienwa, User Integration, user Parents, user principals, user Security, and user Teachers.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	yavvad	yavvad	yavvad.8inglvwubxd.5ogk1ebizzou.6ixrvx7oksv@salesforce.com	Cross Org Data Proxy User	<input checked="" type="checkbox"/>	Cross Org Data Proxy User
Edit	Chatter Expert	Chatter	chatter.00d5j00000canmoeal.noav9pctepo@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	Chatter Free User
Edit	Gulson, Auggie	aguis	aguis.ybda8evy72ok.8gltwvixzvq.cain0t17t18@salesforce.com	Cross Org Data Proxy User	<input checked="" type="checkbox"/>	Cross Org Data Proxy User
Edit	lakshmi kumar, mienwa	mlaks	kumar65@salesforce.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator
Edit	User Integration	integ	integration@00d5j00000canmoeal.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	user Parents	puser	kumarmeruva9@gmail.com	School Profile	<input type="checkbox"/>	School Profile
Edit	user principals	puser	kumarmeruva@gmail.com	School Profile	<input checked="" type="checkbox"/>	School Profile
Edit	user Security	sec	insightsecurity@00d5j00000canmoeal.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	Analytics Cloud Security User
Edit	user Teachers	tuser	kumarmeruva7@gmail.com	School Profile	<input type="checkbox"/>	School Profile

7. 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.

Permission sets 1

The screenshot shows the Salesforce Setup interface for a Permission Set named 'teacher_permission'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Permission Set Overview' for 'teacher_permission'. The overview includes a table with the following information:

Field	Value
Description	Salesforce
License	Salesforce
API Name	teacher_permission
Namespace Prefix	
Session Activation Required	<input type="checkbox"/>
Created By	meruva lakshmi kumar, 30/07/2023, 7:55 pm
Last Modified By	meruva lakshmi kumar, 30/07/2023, 8:01 pm

Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access'. The 'Apps' section is currently expanded, showing a list of apps with columns for 'App Name', 'App Type', and 'App Status'.

Permission Sets 2

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Permission Sets' overview. The overview includes a table with the following information:

Field	Value
Description	Salesforce
License	Salesforce
API Name	teacher_permission
Namespace Prefix	
Session Activation Required	<input type="checkbox"/>
Created By	meruva lakshmi kumar, 30/07/2023, 7:55 pm
Last Modified By	meruva lakshmi kumar, 30/07/2023, 8:01 pm

Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access'. The 'Apps' section is currently expanded, showing a list of apps with columns for 'App Name', 'App Type', and 'App Status'.

8. User Adoption:

In User Adoption we can create ,View and Delete Records (School)



9. 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.

