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.

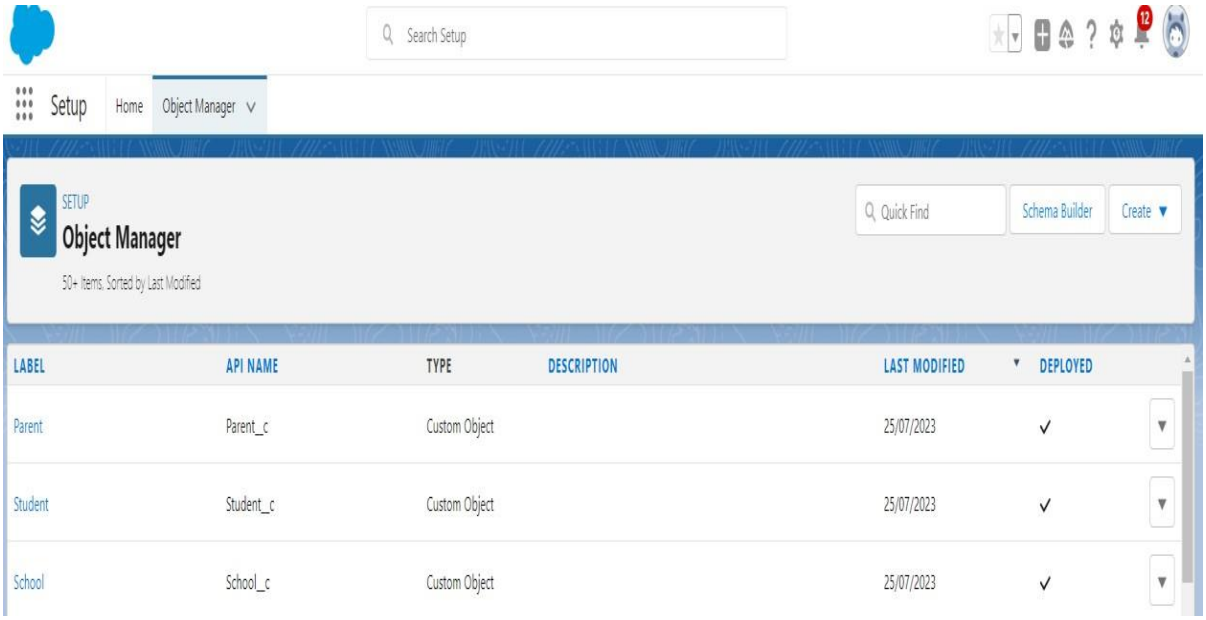
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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

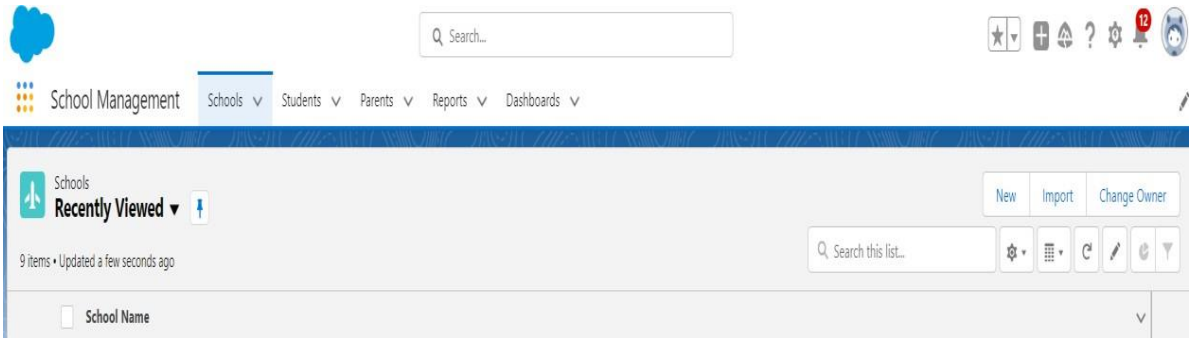
2. Objects – School, Student & Parent

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



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.

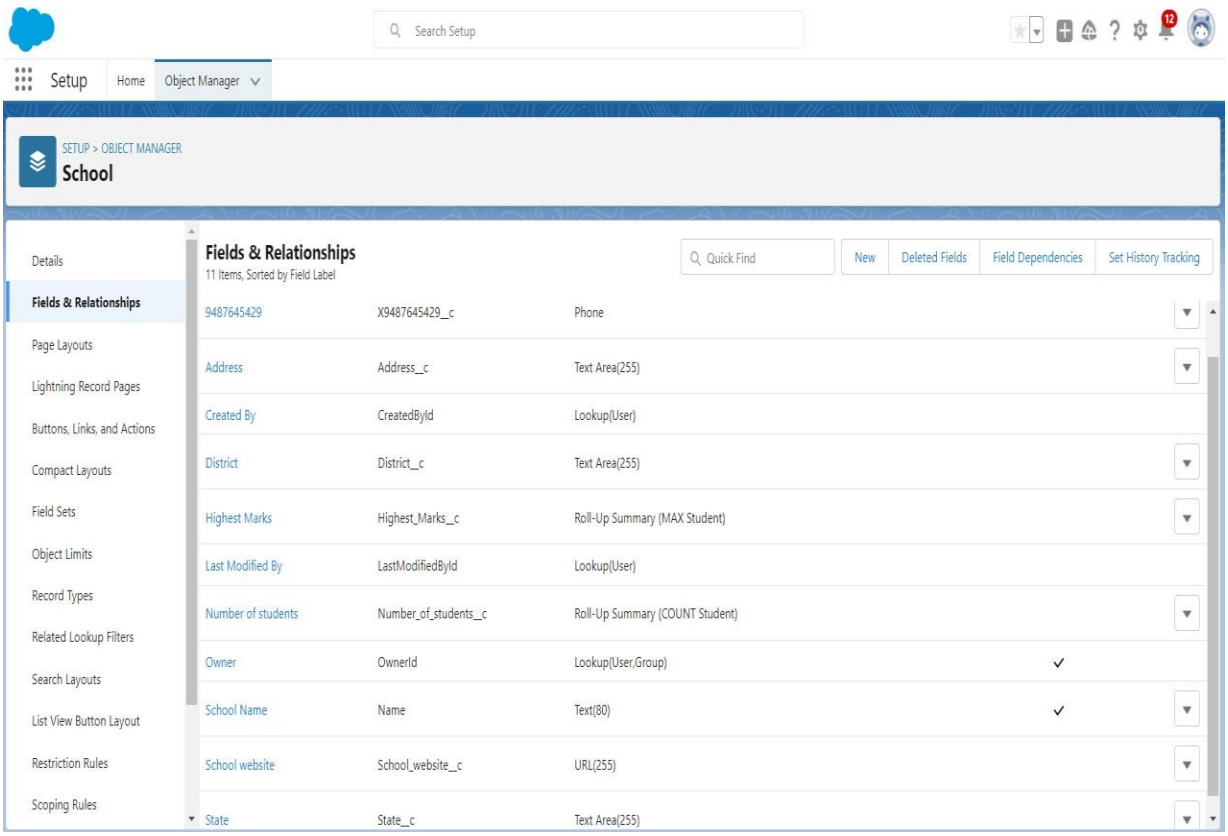


4. Fields And Relationships:

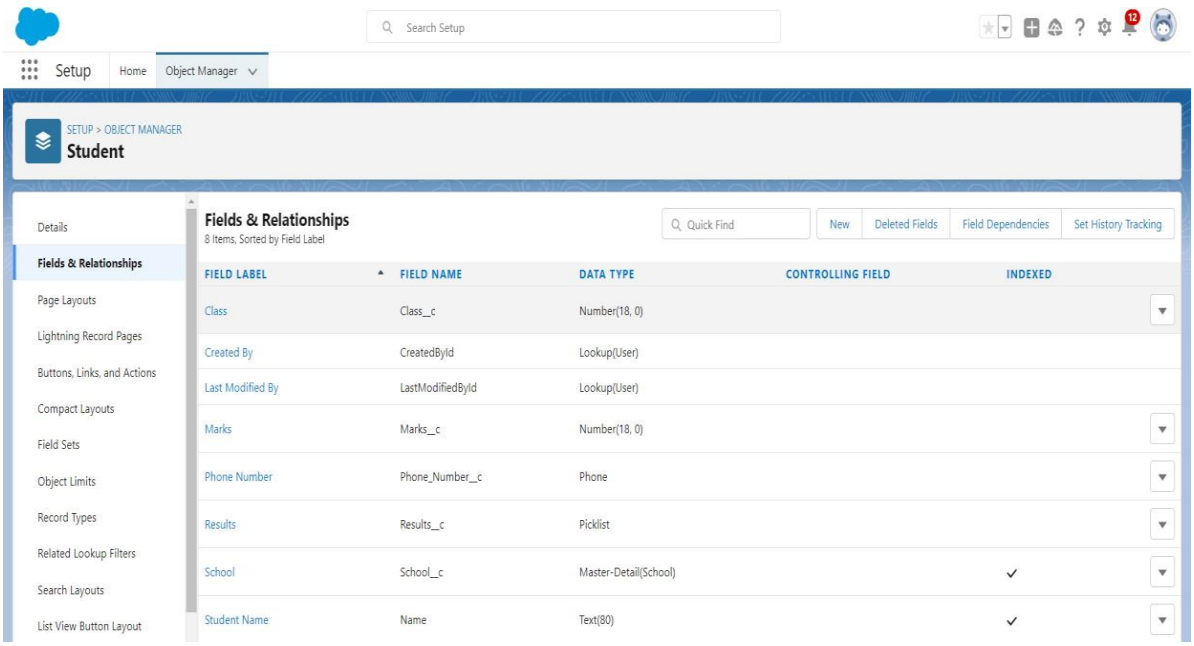
An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

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

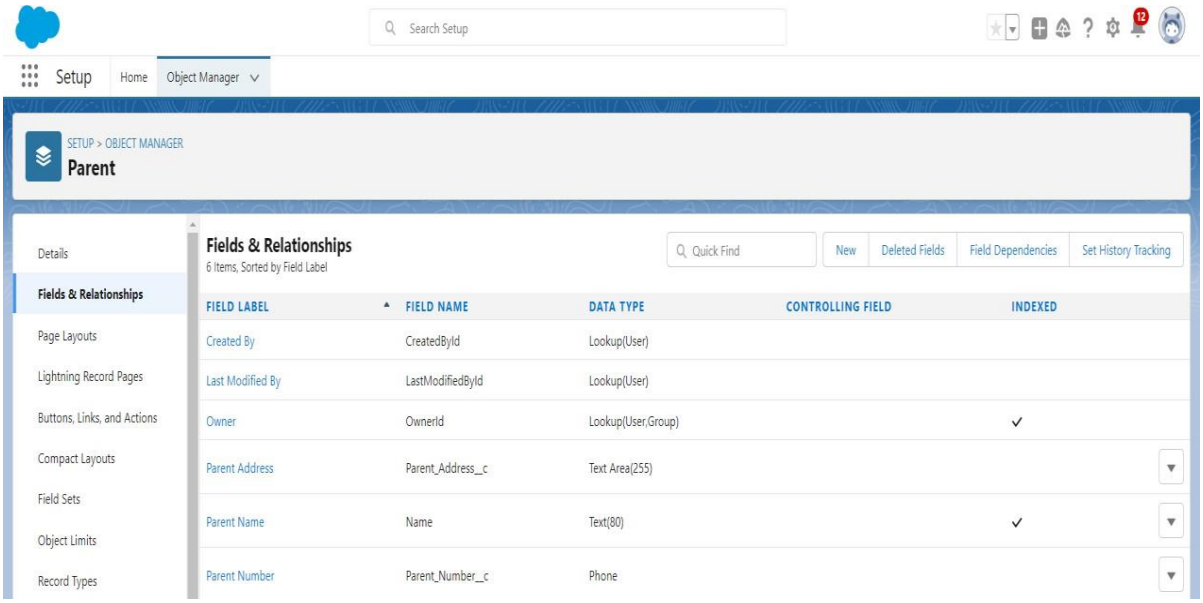
Creation of Fields for School Objects:



Creation of Fields for Student Objects:



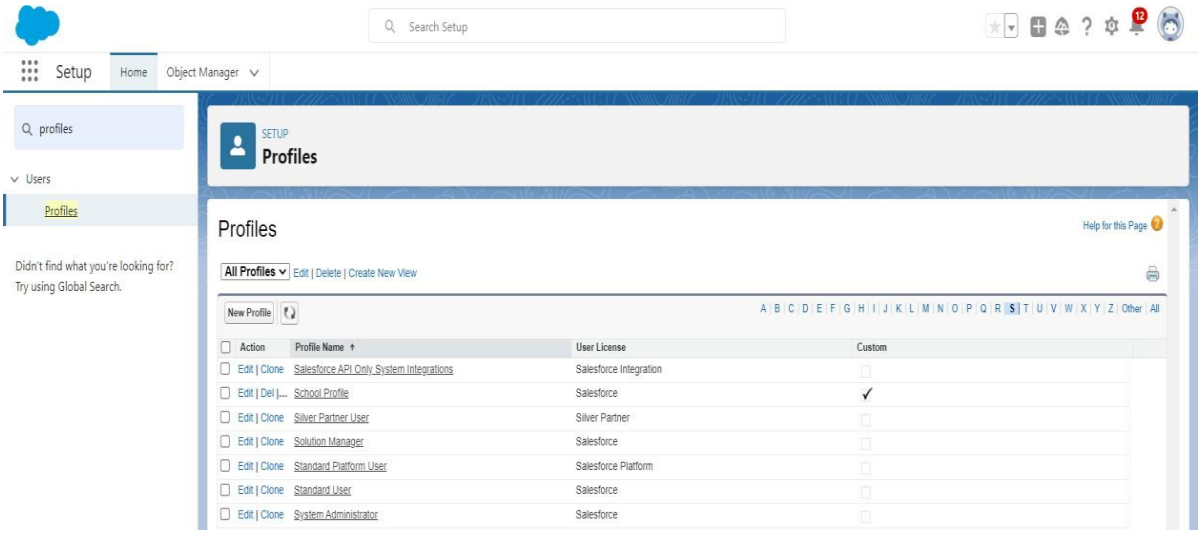
Creation of Fields for Parent Objects



5. Profiles:

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

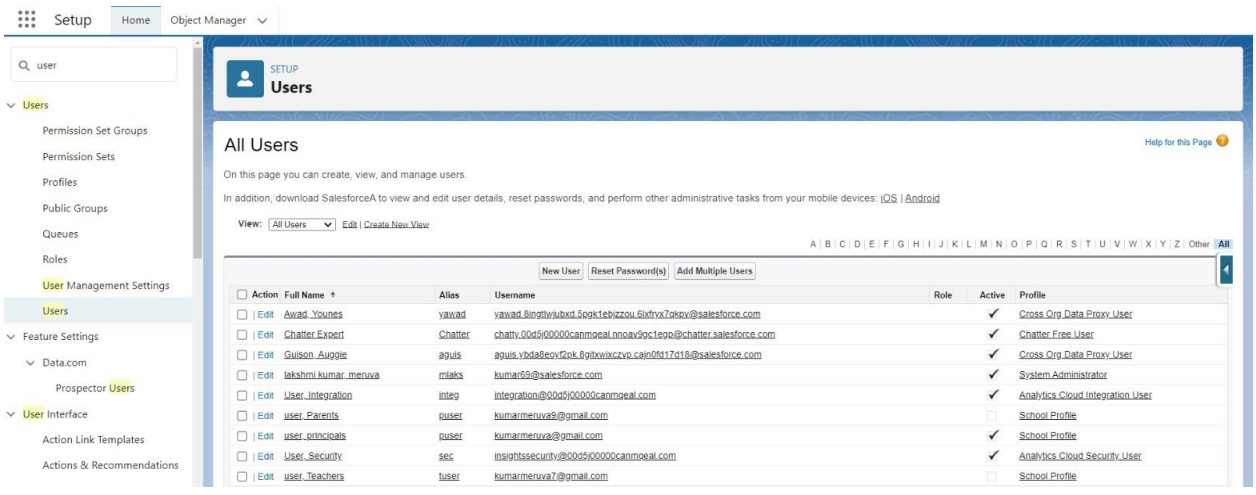
Creation on Profile:



6. Users:

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

Creating a User:



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

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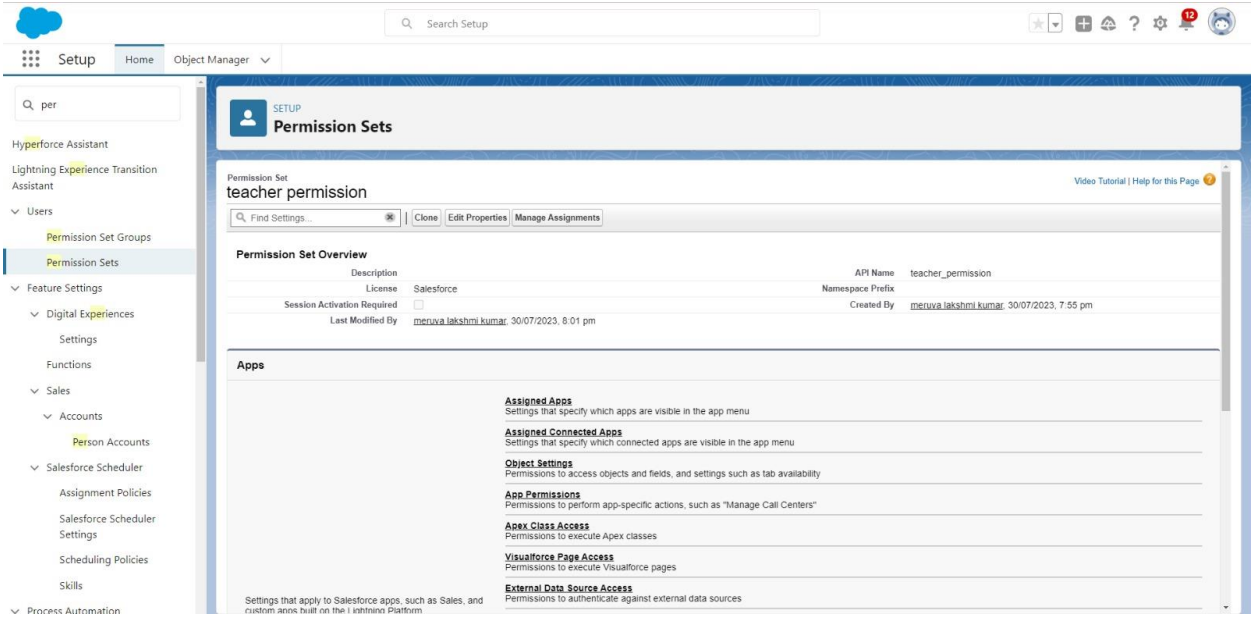
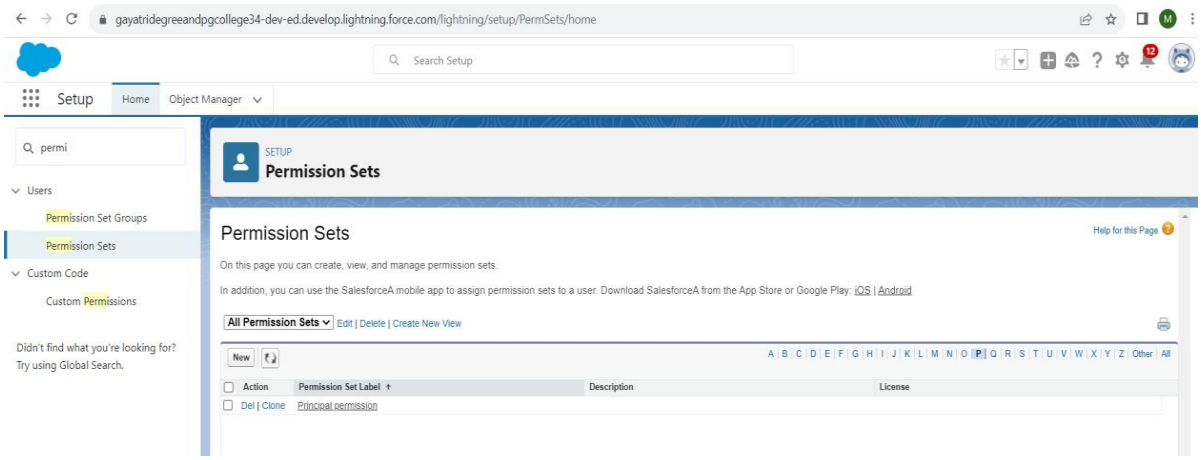


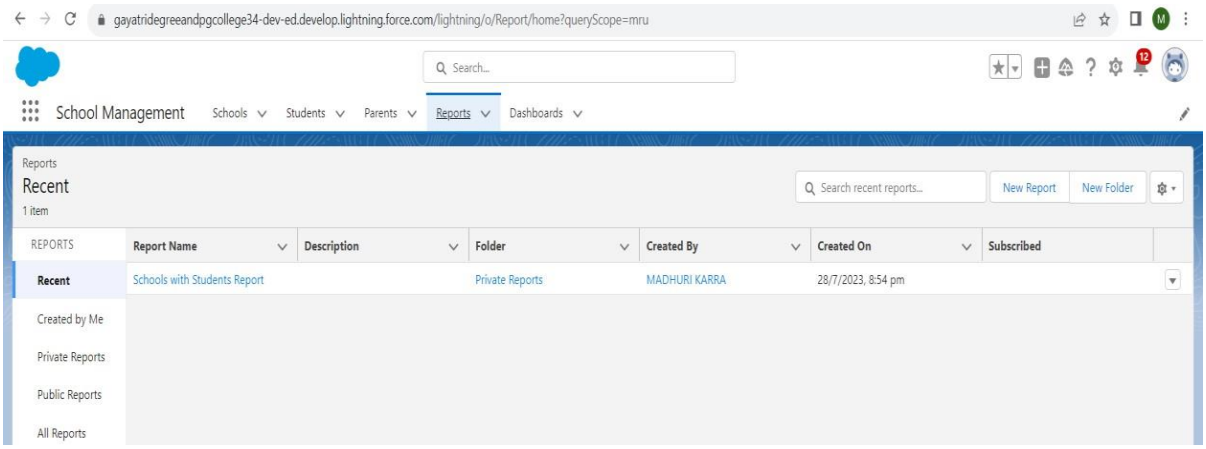
Permission Sets 2



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.