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   -   Vinaybabu Ponaganti

- b. Email   - pvinaybabu2002@gmail.com

- c. Role   - Developer

- d. Company - College Name   - Gayatri Degree & PG College

- e. Country   - India

- f. Postal Code   - 517501

- g. Username   - vinay17@gdctirupathi.com
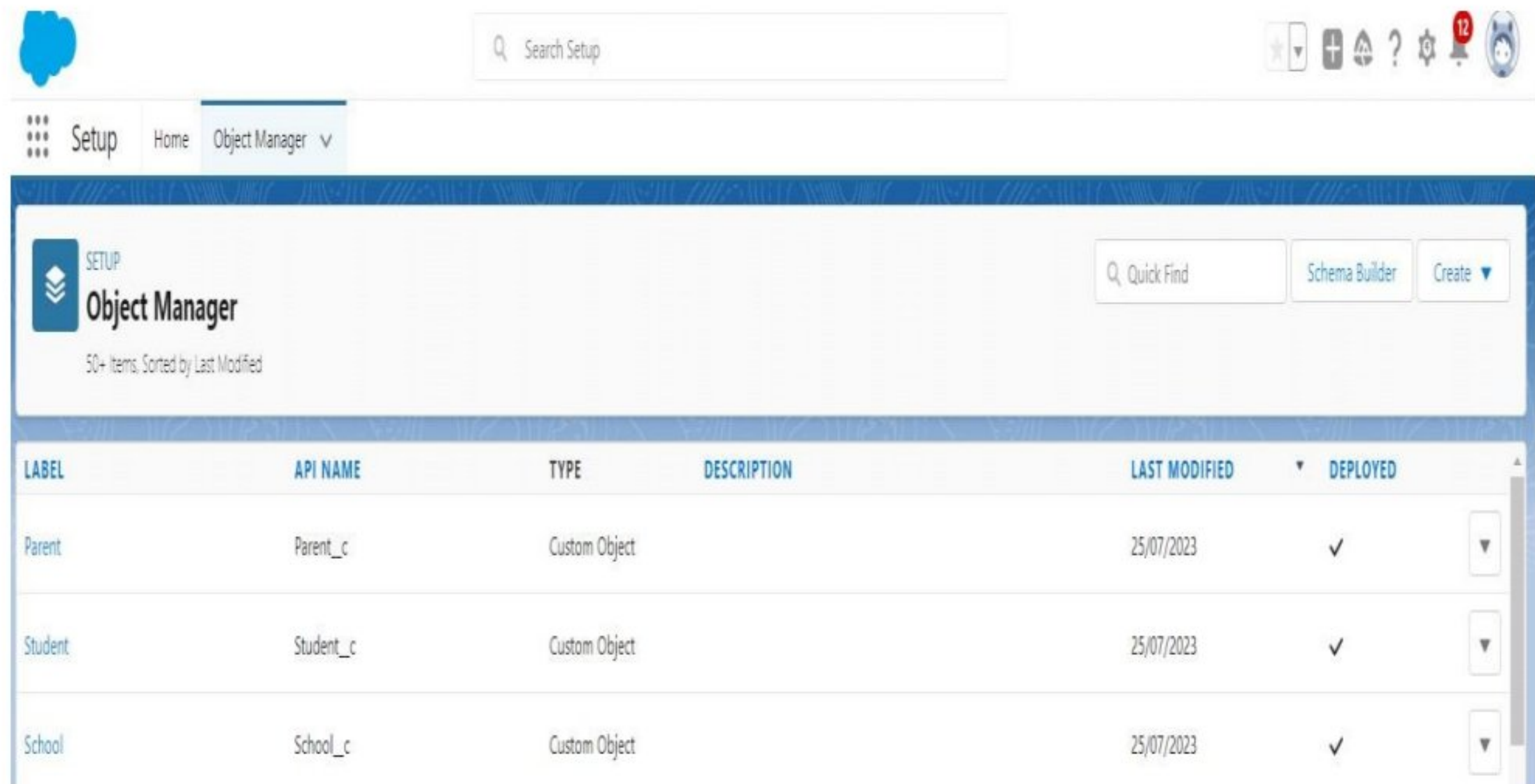

- ## Objects – School, Student & Parent

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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- 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

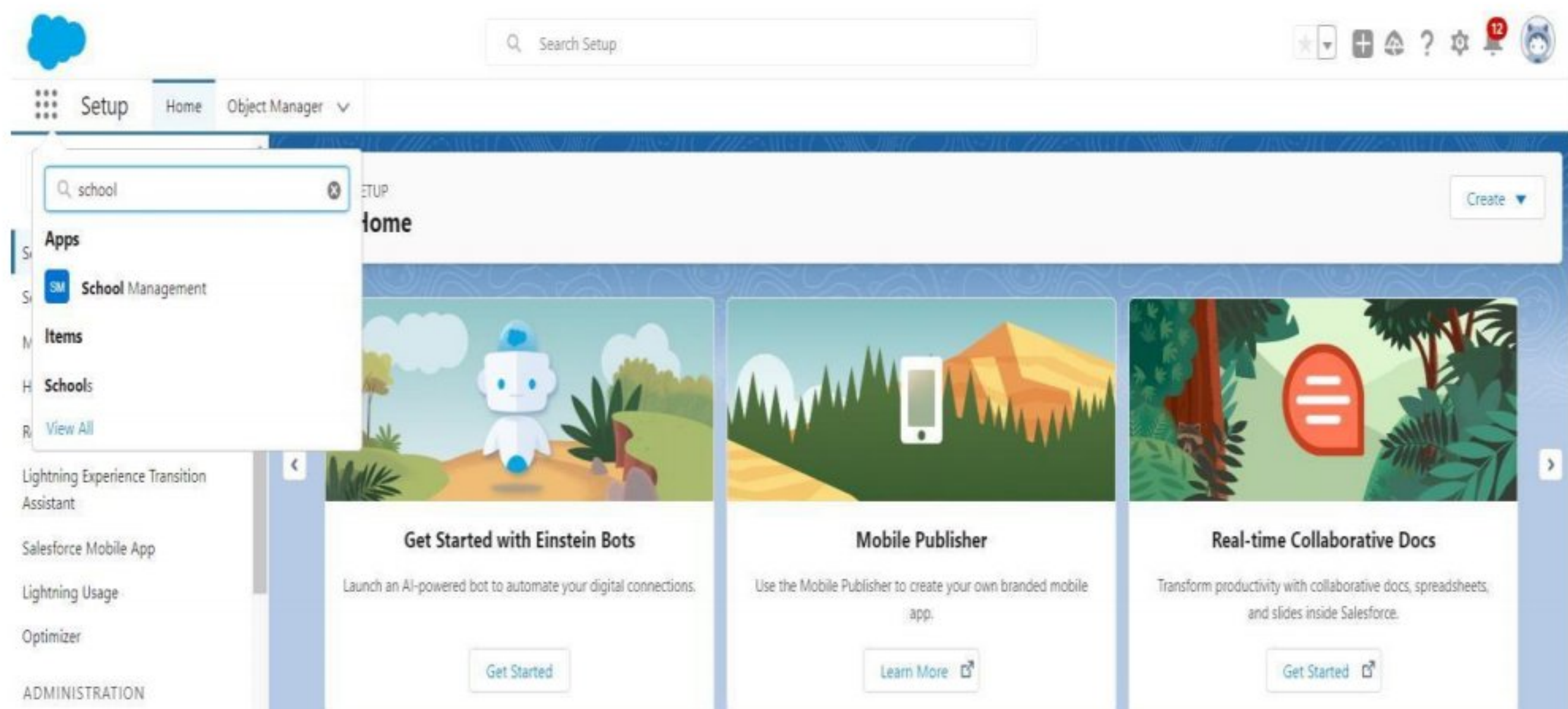For this school management we need to create 3 objects – School, Student and Parent

- **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
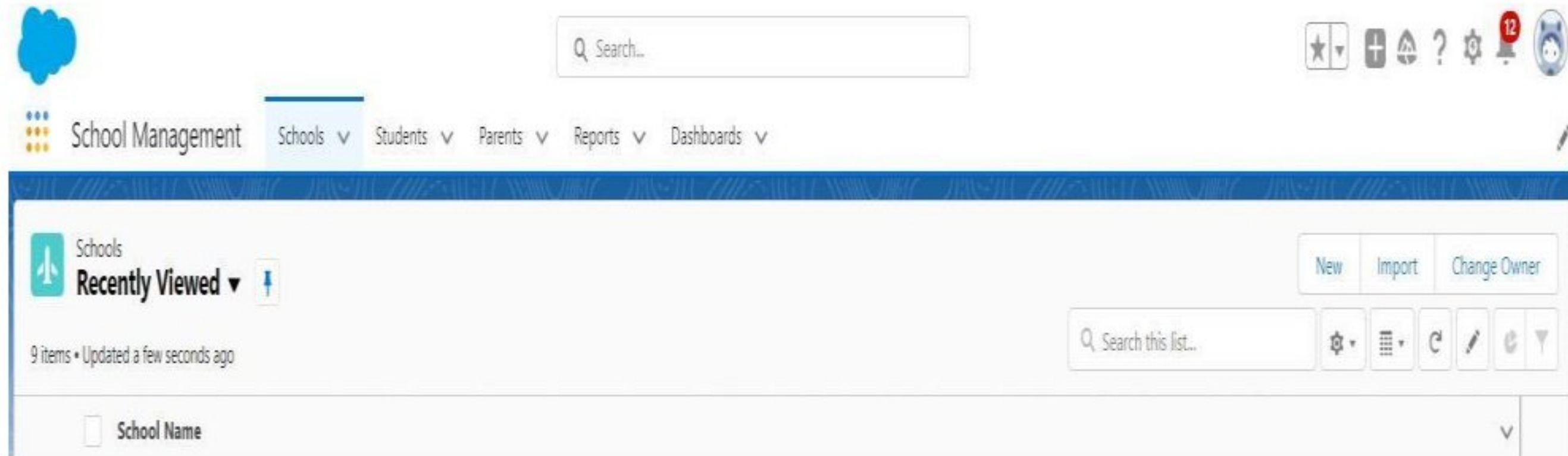
- **Fields And Relationships:**

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:


Creation of Fields for Parent Objects
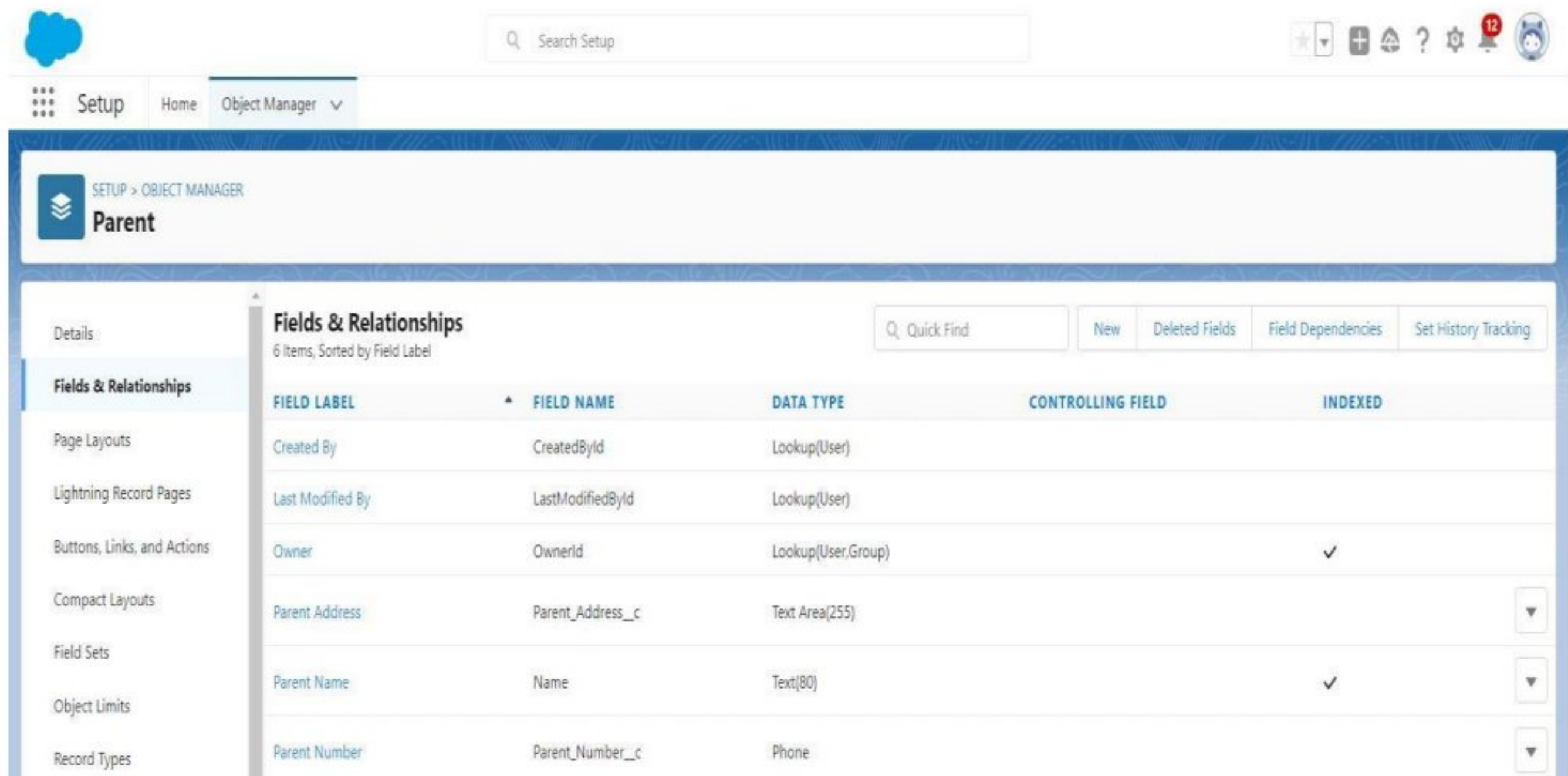
- ## Profiles:

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:
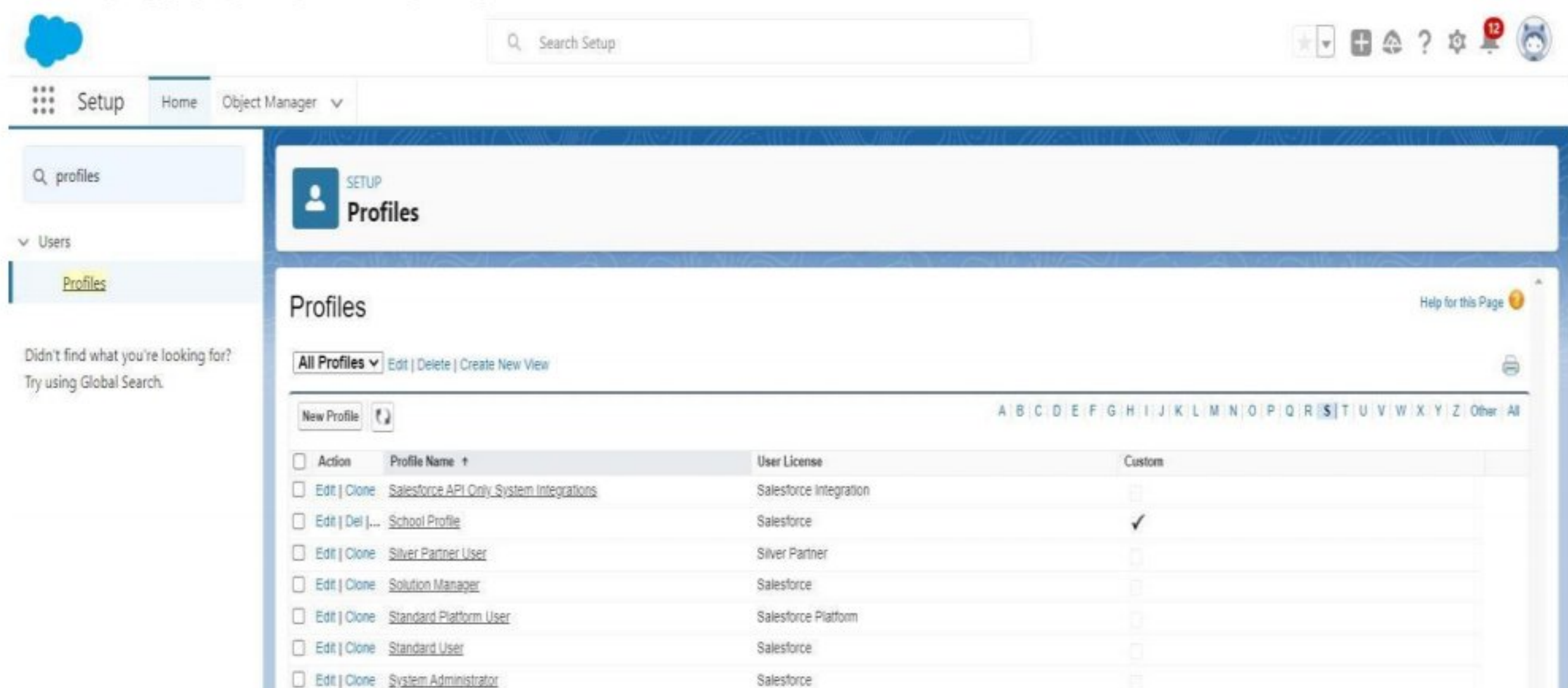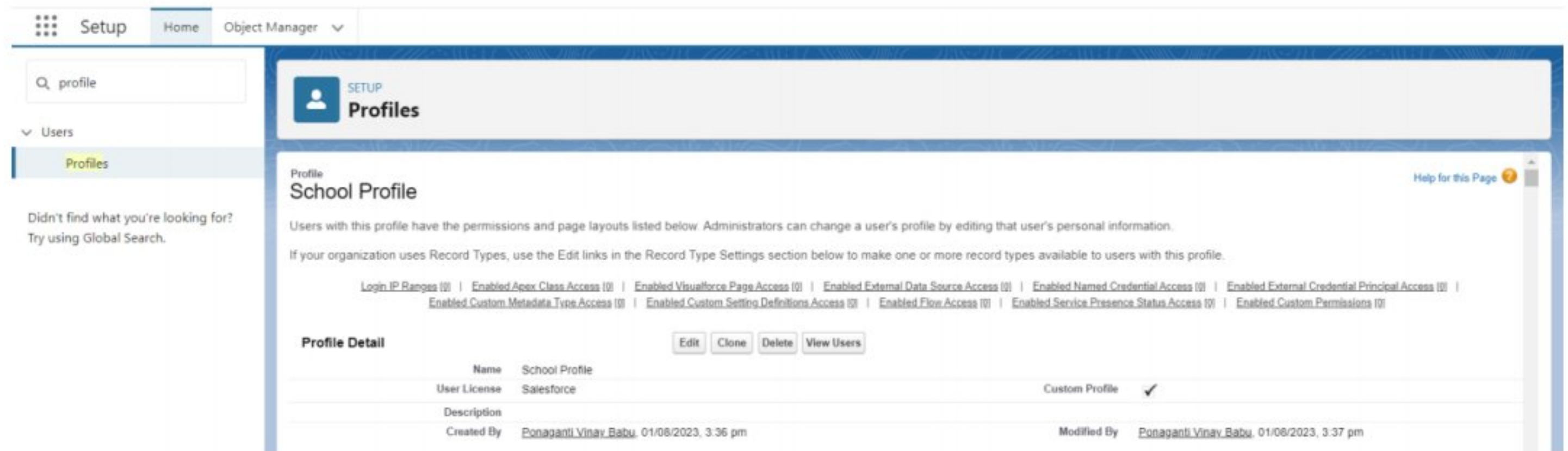
- ## Users:

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:
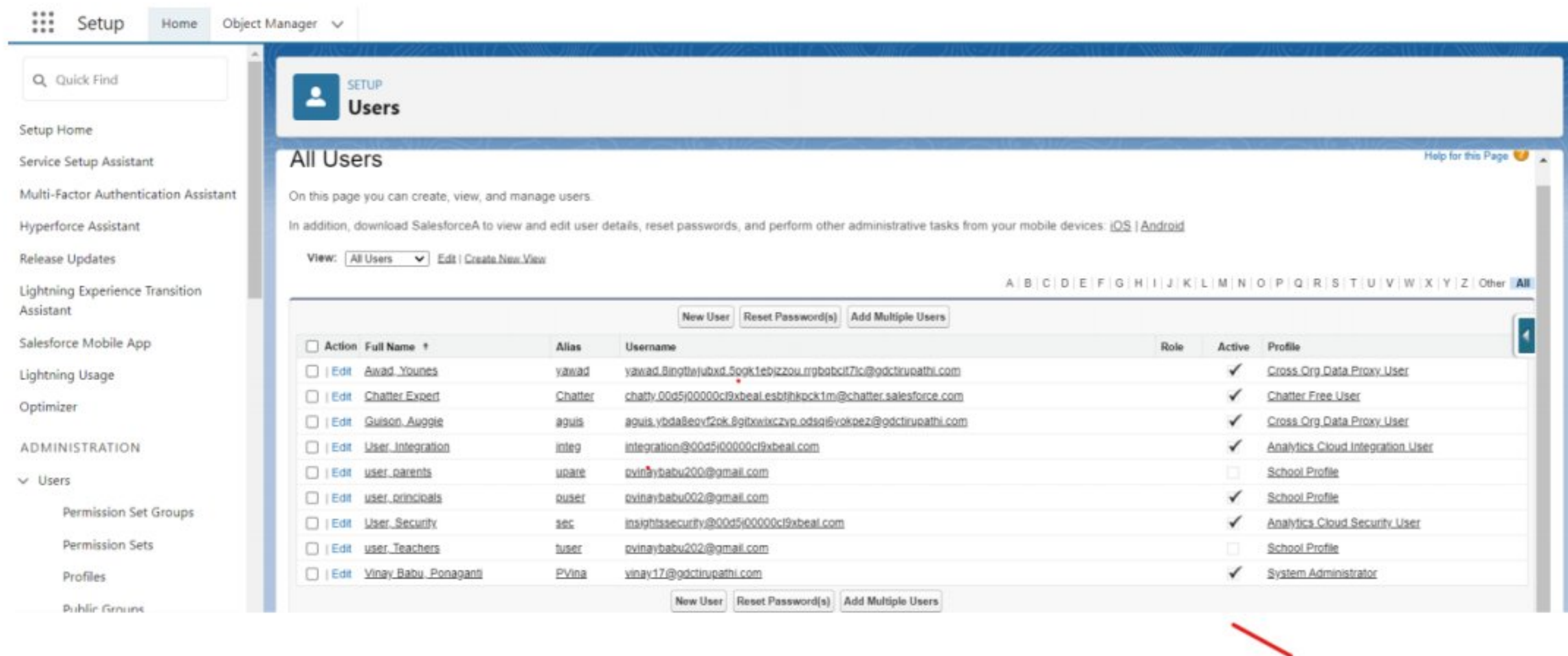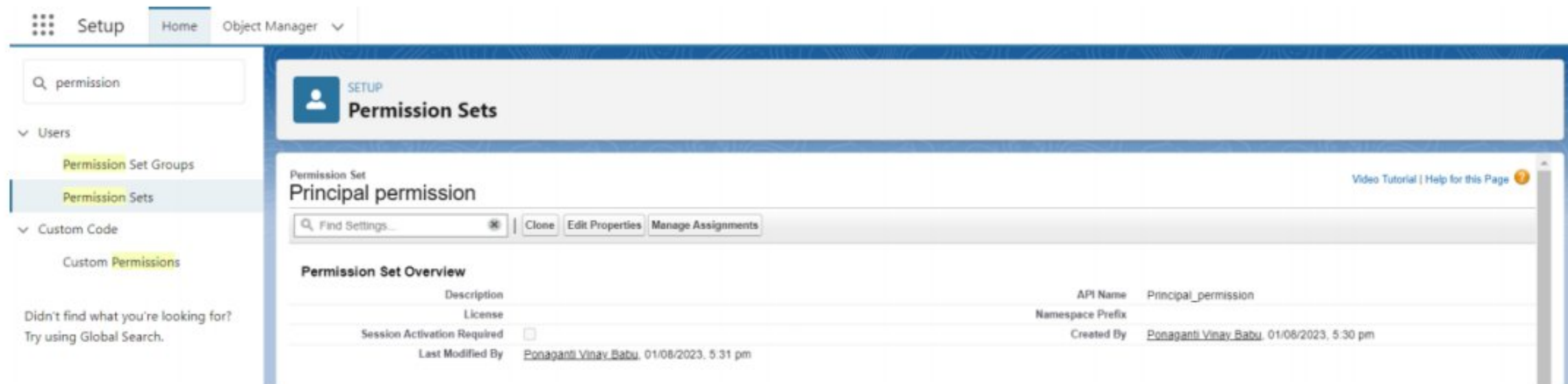
- ## Permission Sets:

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
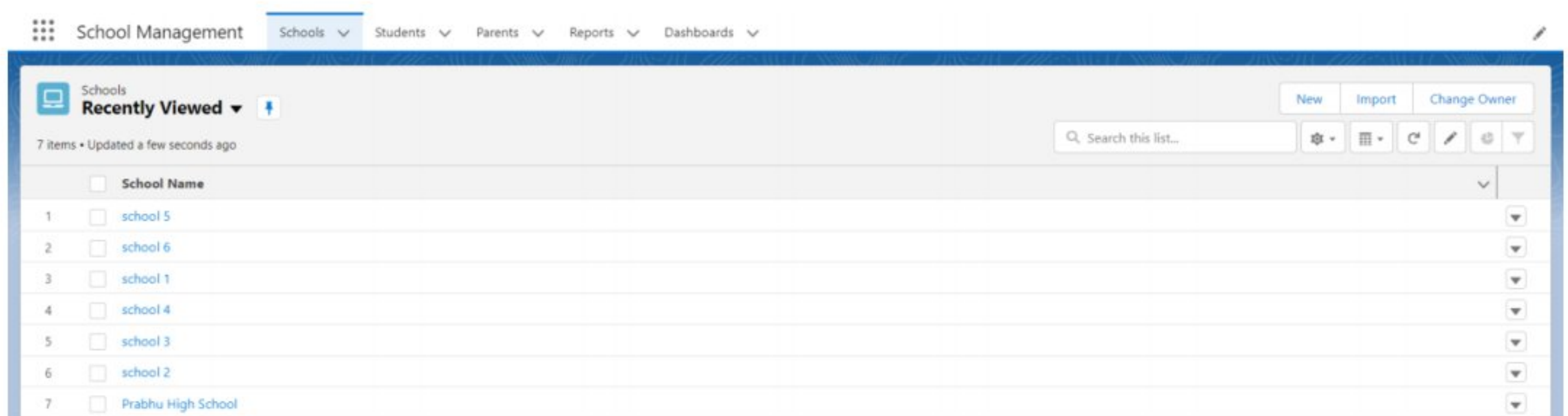
Permission sets 1:
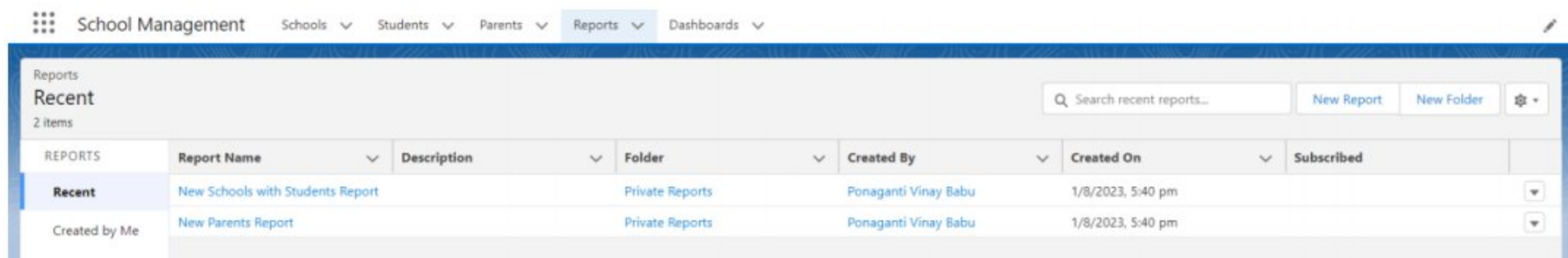
Permission Sets 2:

- 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.

Report: Schools with Students
New Schools with Students Report

Enable Field Editing   🔍   Add Chart   ▼   C   Edit ▼

Total Records
6

	School: School Name ▼	Student: Student Name ▼
1	Prabhu High School	krupakaran
2	Prabhu High School	Nitesh
3	Prabhu High School	Vinay Babu
4	school 6	kumar
5	school 1	satya
6	school 5	uday