

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.

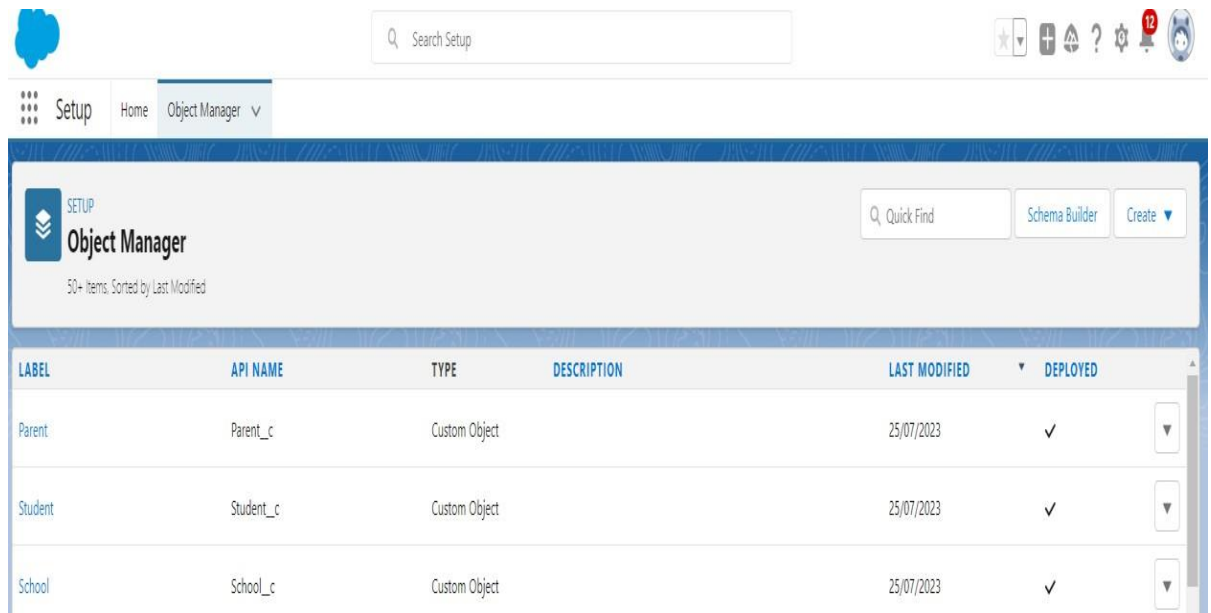
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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 - Poornachandrababu& perumandi
 - b. Email - punithpoorn1@gmail.com
 - c. Role - Developer
 - d. Company - College Name - Gayatri Degree & PG College
 - e. Country - India
 - f. Postal Code - 517501
 - g. Username - poorna06@gdc.com

2. Objects – School, Student & Parent

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

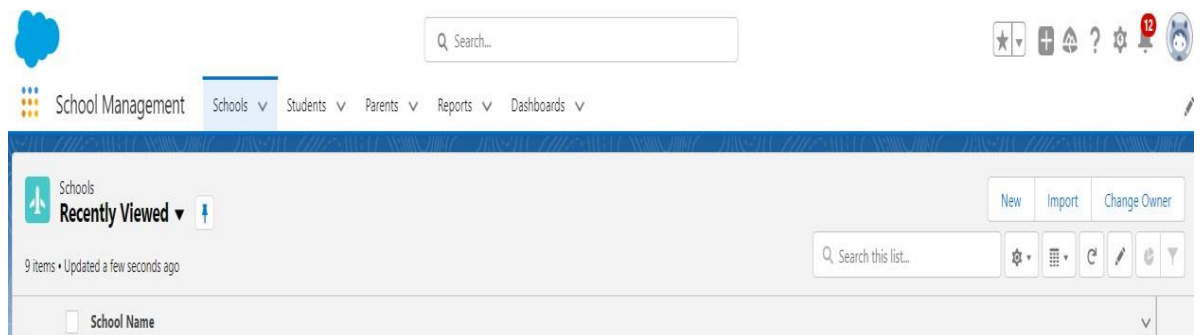


The screenshot shows the Salesforce Setup interface, specifically the Object Manager page. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" tab is selected, and the "Object Manager" sub-tab is active. The main content area displays the "Object Manager" header with a "Quick Find" search bar, a "Schema Builder" button, and a "Create" dropdown menu. Below the header, a table lists the objects created for the school management system. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Three objects are listed: Parent, Student, and School, all of type "Custom Object" and last modified on 25/07/2023. Each object has a "DEPLOYED" status of "✓" and a dropdown arrow for further actions.

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 selected, and the "Schools" tab is active. The main content area displays the "Schools" header with a "Recently Viewed" dropdown menu and a "New" button. Below the header, a table lists the schools. The table has columns for School Name and a dropdown arrow for further actions. The table contains one row with the text "School Name".

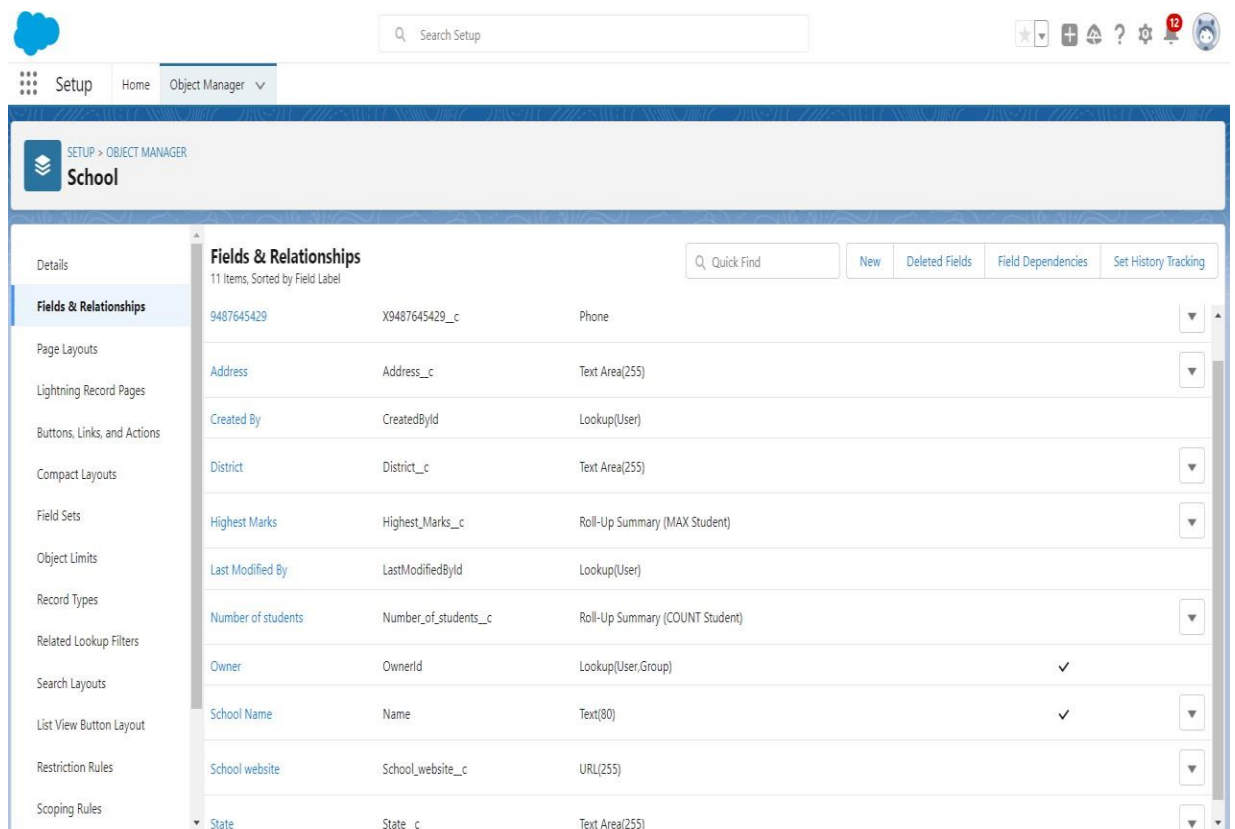
School Name

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 displays the Salesforce Setup interface for the 'School' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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 is titled 'Fields & Relationships' and shows 11 items, sorted by Field Label. The fields are listed in a table with columns for Field Name, Field Label, and Field Type. The 'Owner' field is marked with a checkmark, indicating it is the primary key.

Field Name	Field Label	Field Type
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 left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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 main content area is titled 'Fields & Relationships' and shows 8 items, sorted by Field Label. The table below lists the fields for the Student object.

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

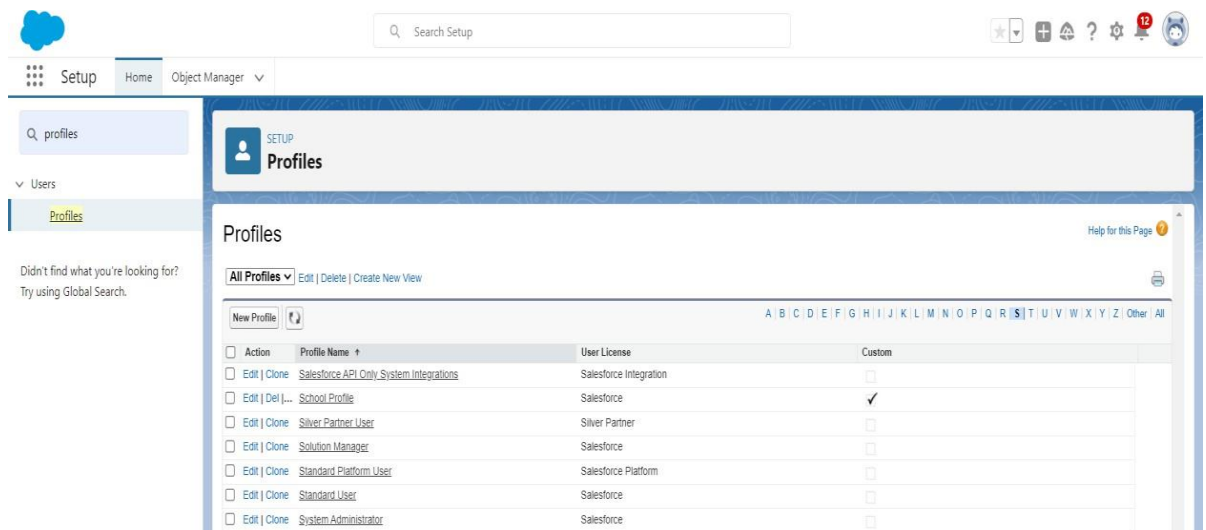
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. The table below lists the fields for the Parent object.

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:



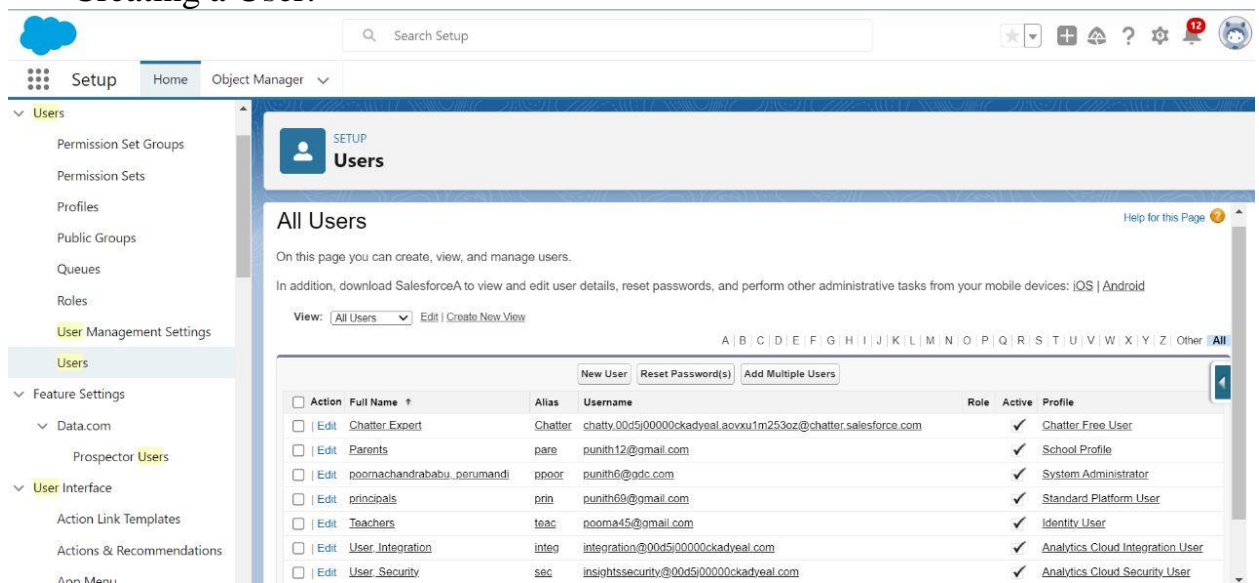
The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains a search bar with 'profiles' and a list of navigation items: Users, Profiles (selected), and a search suggestion. The main content area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'School Profile' is highlighted with a checkmark in the Custom column.

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Delete	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 Users. The left sidebar contains a search bar with 'users' and a list of navigation items: Users (selected), User Management Settings, and a search suggestion. The main content area is titled 'All Users' and includes a 'New User' button and a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'System Administrator' profile is highlighted with a checkmark in the Active column.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d5j00000ckadyeal.aovxu1m253oz@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Parents	pare	punith12@gmail.com		<input checked="" type="checkbox"/>	School Profile
Edit	poomachandrababu_perumandi	ppoor	punith6@gdc.com		<input checked="" type="checkbox"/>	System Administrator
Edit	principals	prin	punith68@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	Teachers	teac	nooma45@gmail.com		<input checked="" type="checkbox"/>	Identity User
Edit	User Integration	integ	integration@00d5j00000ckadyeal.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d5j00000ckadyeal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security 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

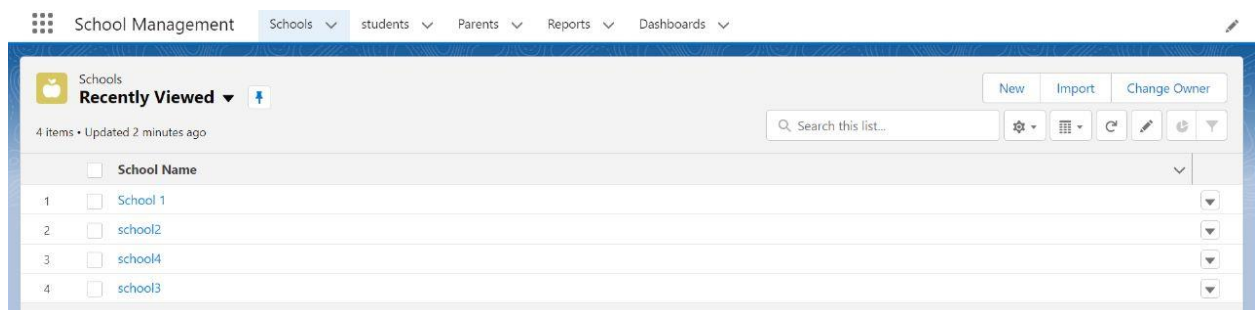
The screenshot shows the Salesforce Setup interface for the 'teacher_permission' Permission Set. The left sidebar contains navigation links: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and shows the 'teacher_permission' set. It includes a search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. Below this is the 'Permission Set Overview' section with a table showing details: Description (teacher_permission), API Name (teacher_permission), License, Namespace Prefix, Session Activation Required (checkbox), Created By (perumandi.poomachandrababu, 31/07/2023, 1:55 pm), and Last Modified By (perumandi.poomachandrababu, 31/07/2023, 2:06 pm). The 'Apps' section is also visible, with sub-sections for 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'.

Permission Sets 2

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' overview. The left sidebar contains navigation links: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a search bar, 'New', 'Edit', 'Delete', and 'Create New View' buttons. Below this is a table with columns: Action, Permission Set Label, Description, and License. The table contains one row: 'Principal permission'. The bottom of the page shows a navigation bar with links: A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, Other, All.

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.

