

A CRM APPLICATION FOR SCHOOLS/ COLLEGES

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

A CRM APPLICATION FOR SCHOOLS /COLLEGES USING SALESFORCE

Submitted by

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DINDIGUL-624001.

APRIL - 2023

1. INTRODUCTION:

Salesforce is a cloud-based software company that provides its customers with a platform to develop their own applications without following the tough steps that they used to follow in the legacy system. The software or application once created can be uploaded onto the cloud allowing the end-users to view them

1.1 OVERVIEW :

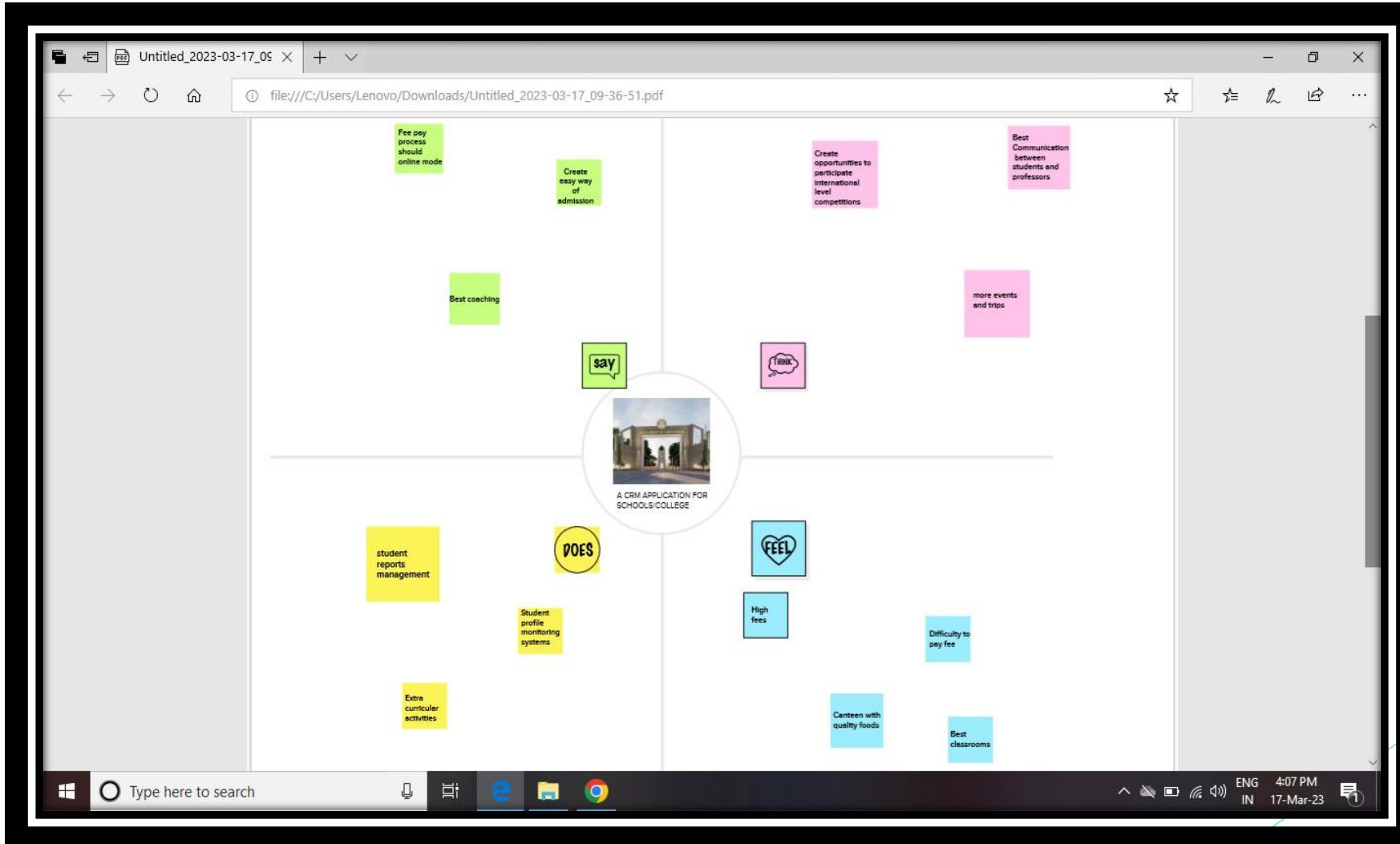
This Project helps you to maintain and manage the school related problems which further can be modified based on the requirements.

1.2 PURPOSE :

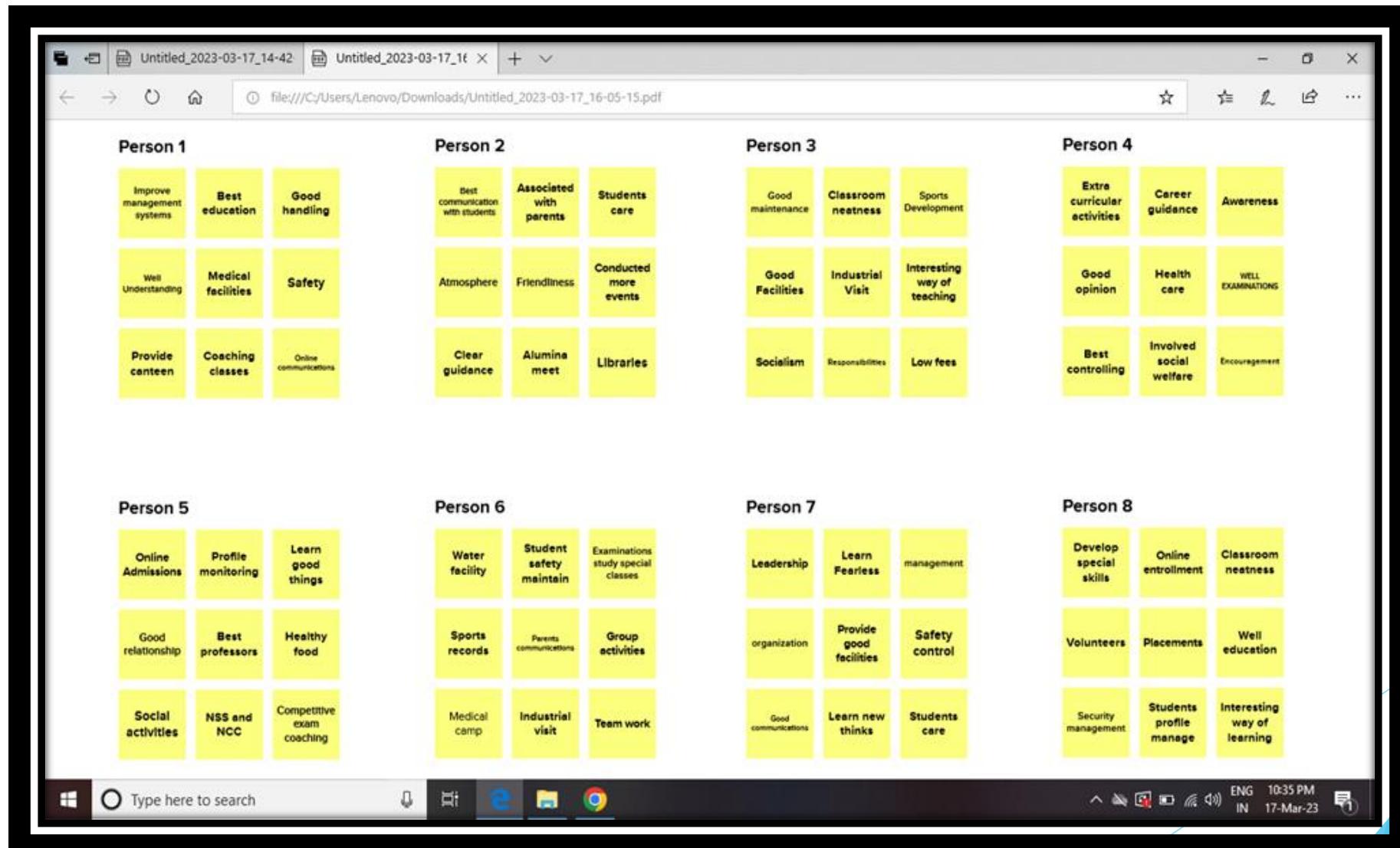
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP:



2.2 IDEATION & BRAINSTORMING MAP:



3. RESULT

3.1 DATA MODEL:

OBJECT NAME	FIELDS IN THE OBJECT	
SCHOOL	FIELD LABEL	DATA TYPE
	ADDRESS	TEXT AREA
	DISTRICT	TEXT AREA
	STATE	TEXT AREA
	SCHOOL WEBSITES	TEXT AREA
	PHONE NUMBER	PHONE
	NUMBER OF STUDENTS	ROLL-UP SUMMARY
	HIGHEST MARKS	ROLL-UP SUMMARY

OBJECT NAME	FIELDS IN THE OBJECT	
STUDENT	FIELD LABEL	DATA TYPE
	PHONE NUMBER	PHONE
	RESULTS	PICKLIST
	CLASS	NUMBER
PARENT	FIELD LABEL	DATA TYPE
	PARENT ADDRESS	TEXT AREA
	PARENT NUMBER	PHONE

3.2 ACTIVITY AND SCREENSHOT

Milestone-1:

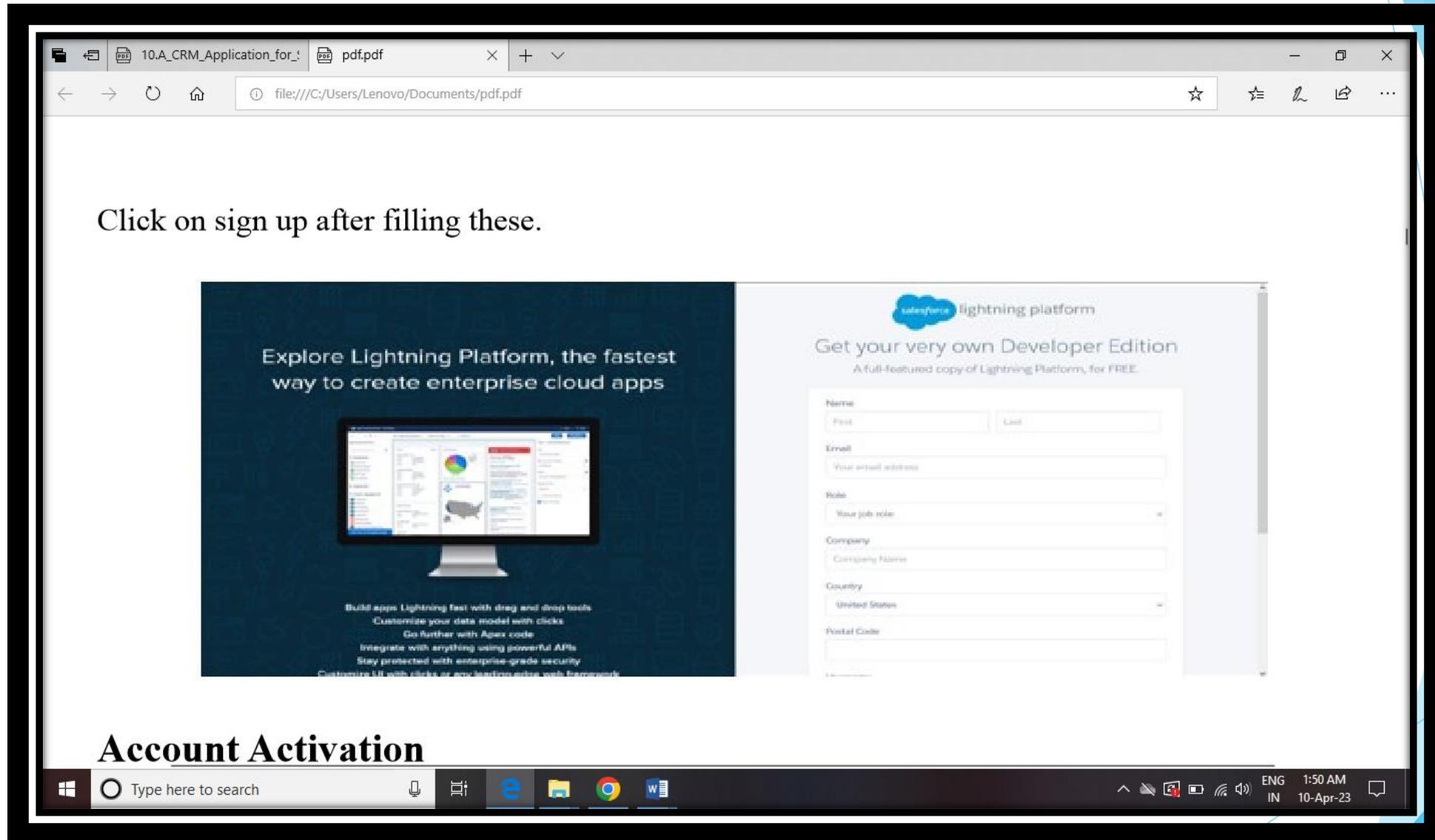
Activity : Creating Developer Account

Creating Developer Account

Creating a developer org in Salesforce.

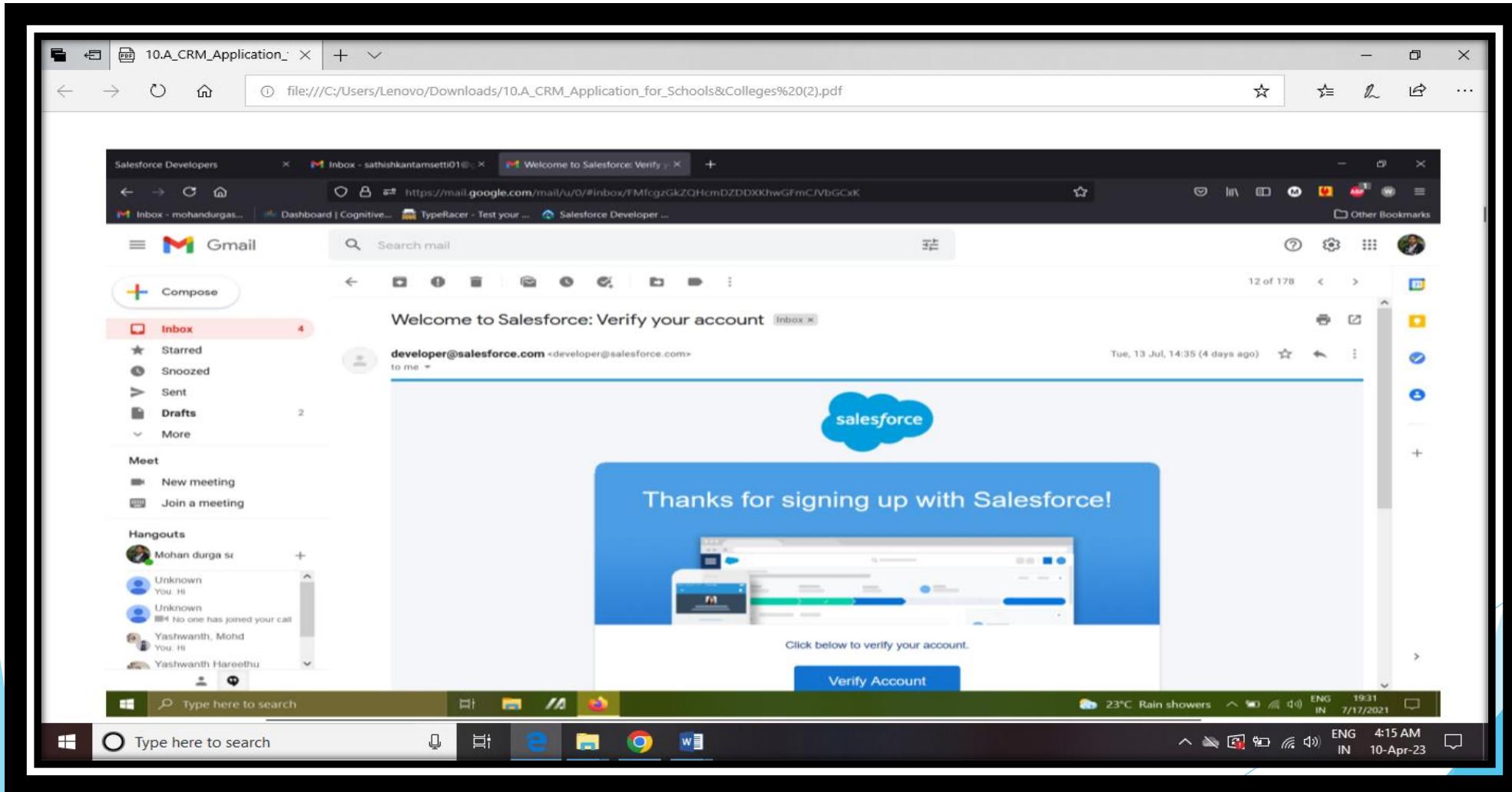
1. Go to <http://developer.salesforce.com/>
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - b. Email
 - c. Role : Developer
 - d. Company : College Name
 - e. County : India
 - f. Postal Code : pin code
 - g. Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the format :
username@organization.com

click on sign up after filling these.



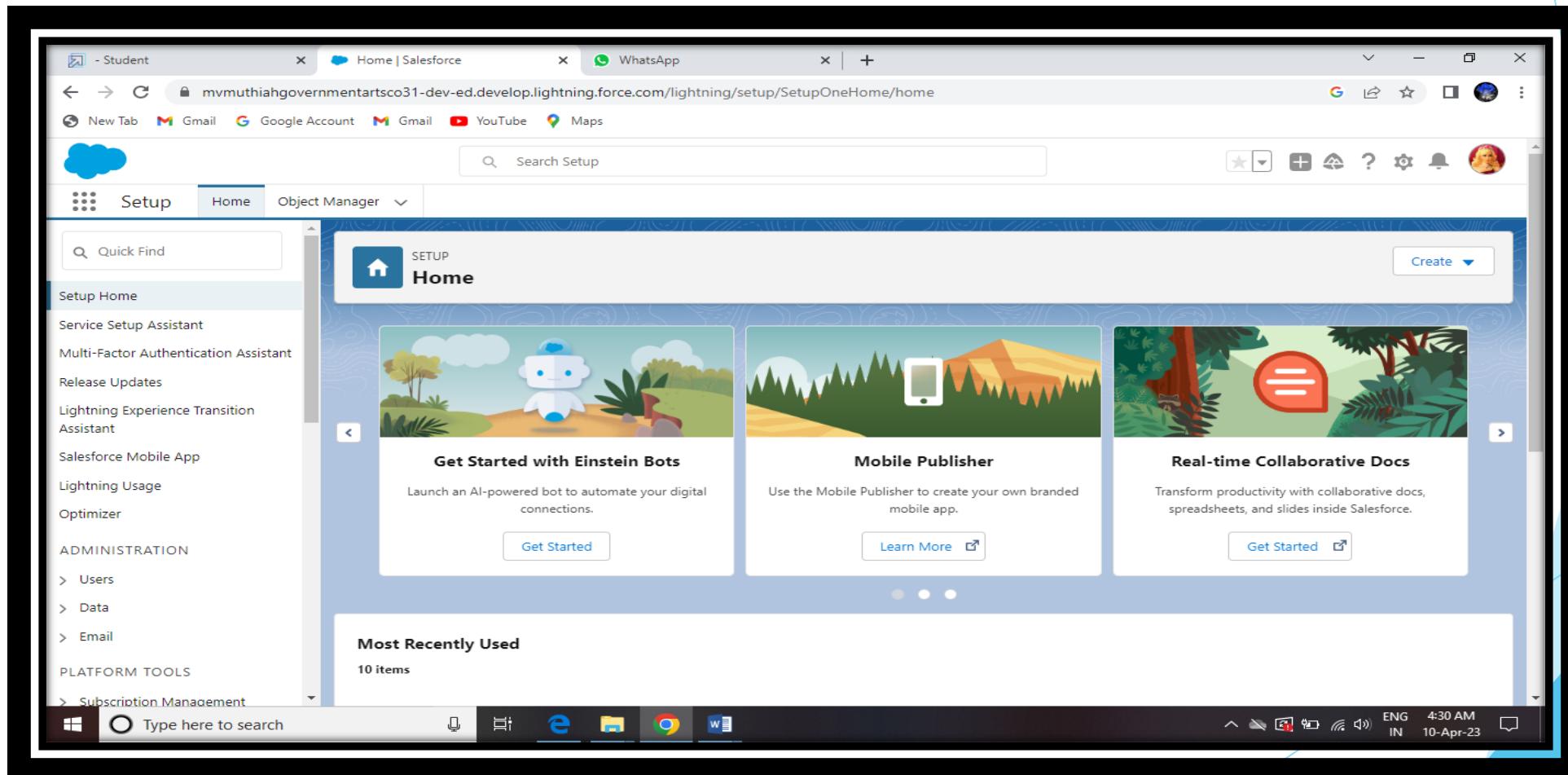
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



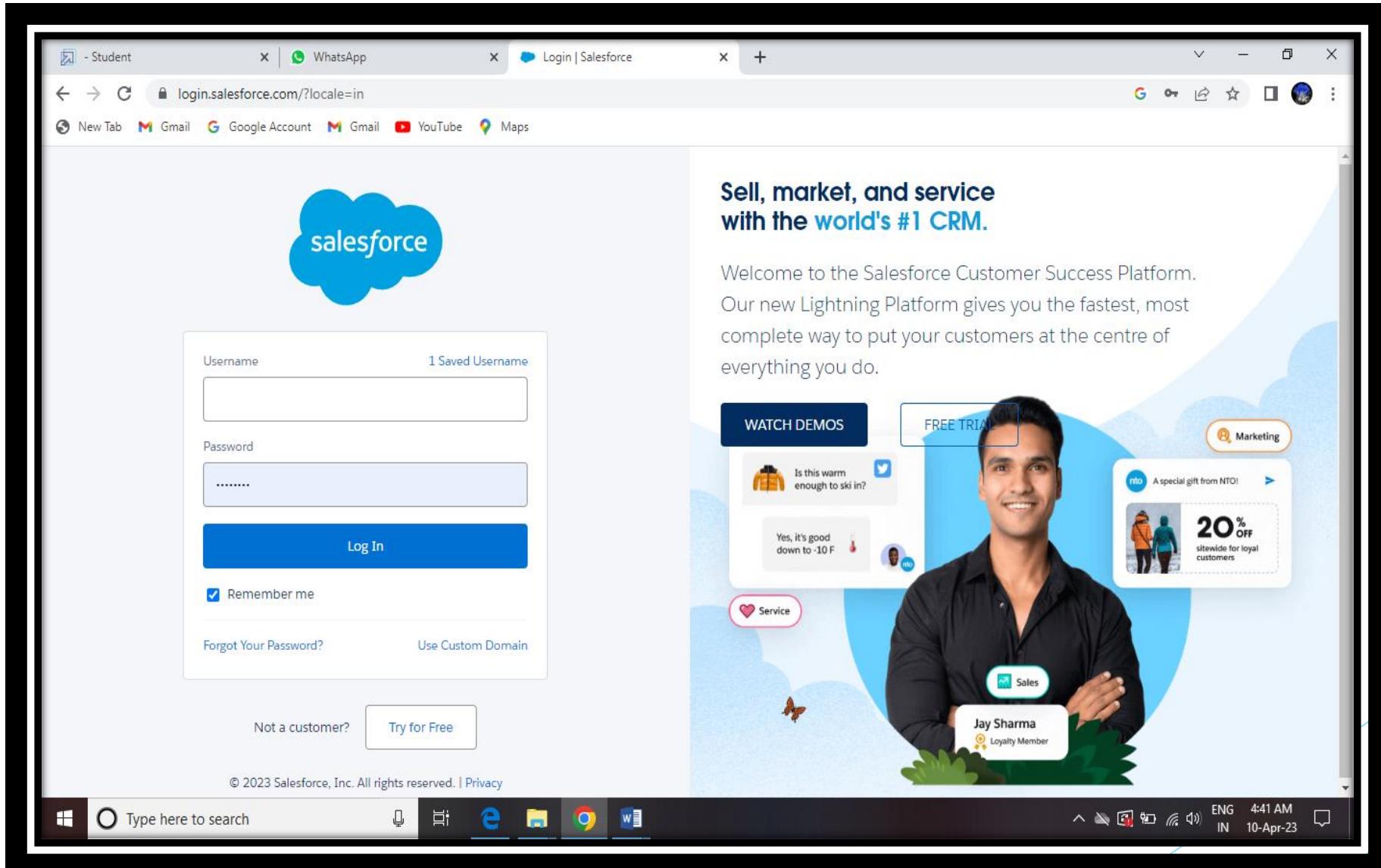
Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Salesforce Login

<http://login.Salesforce.com>



MILESTONE -2: OBJECT

ACTIVITY -1: Creation of School Object

1. Click on the gear icon and then the select setup.
2. Click on the object manager tab just beside the home tab .
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom object.

- On the Custom object definition page , create the object as follows:
- Label: school
- Plural label: schools
- Record name: school name
- Check the Allow Reports check box
- Check the Allow Search check box
- Click save.

Home | Salesforce School | Salesforce

mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVW/Details/view

New Tab Gmail Google Account Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

School

Details

Description

API Name: School_c

Custom: ✓

Singular Label: School

Plural Label: Schools

Enable Reports: ✓

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Results

https://mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELVW/Details/view

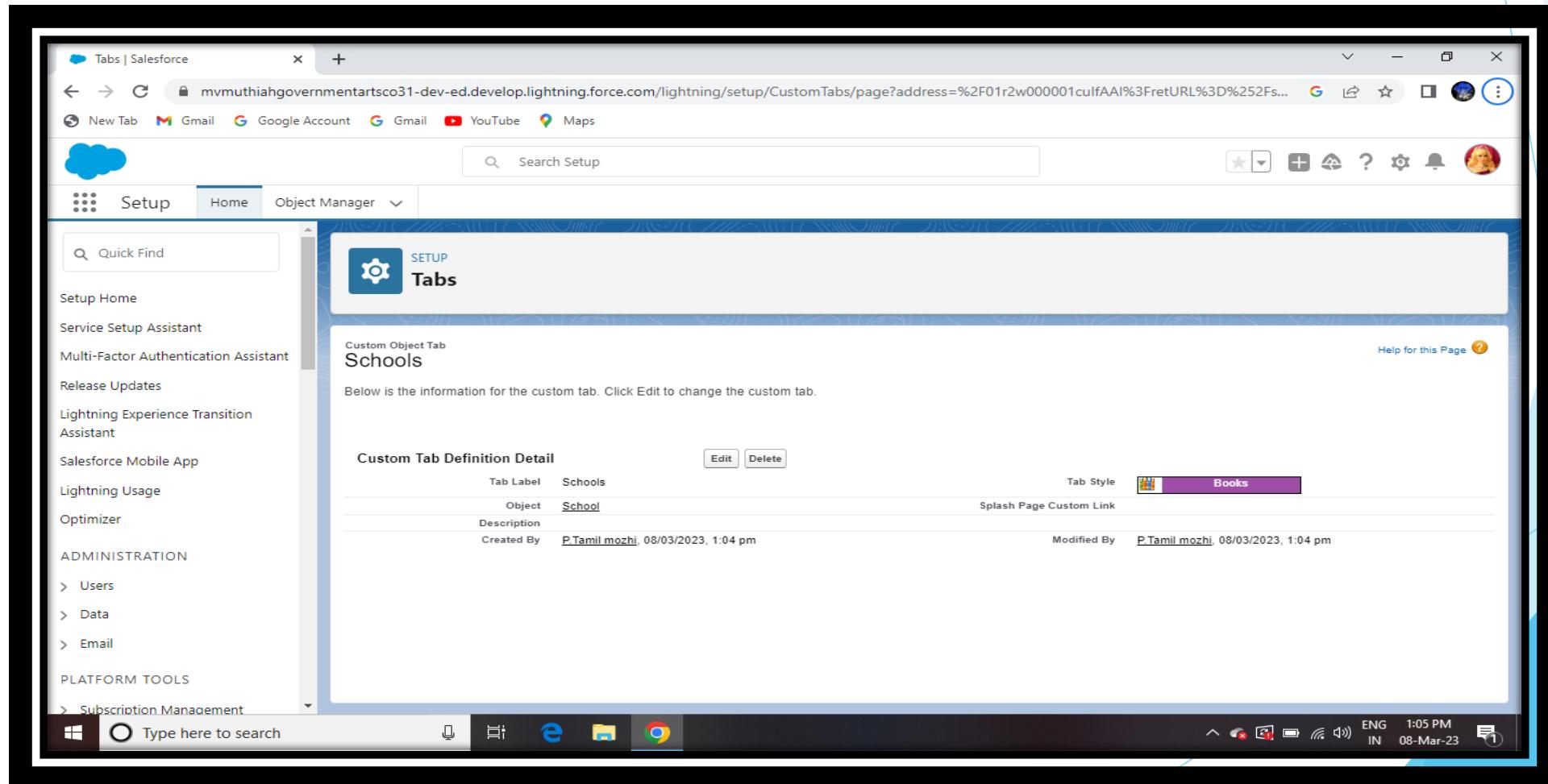
Type here to search

12:27 AM IN 07-Mar-23

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Object Tabs, click New.

1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



In the same way create other objects such as students and parents.

Activity 2: Create student object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - On the Custom Object Definition page, create the object as follows:
 - Label: Students
 - Plural Label: Students
 - Record Name: Student Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox
 - Click save.

Student | Salesforce

mvmuthiahgovernmentartsco31-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ER4y/Details/view

New Tab Gmail Google Account Gmail YouTube Maps

Setup Home Object Manager

SETUP > OBJECT MANAGER Student

Details

Description

API Name Student_c

Custom ✓

Singular Label Student

Plural Label Students

Edit Delete

Enable Reports ✓

Track Activities

Track Field History

Deployment Status Deployed

Help Settings Standard salesforce.com Help Window

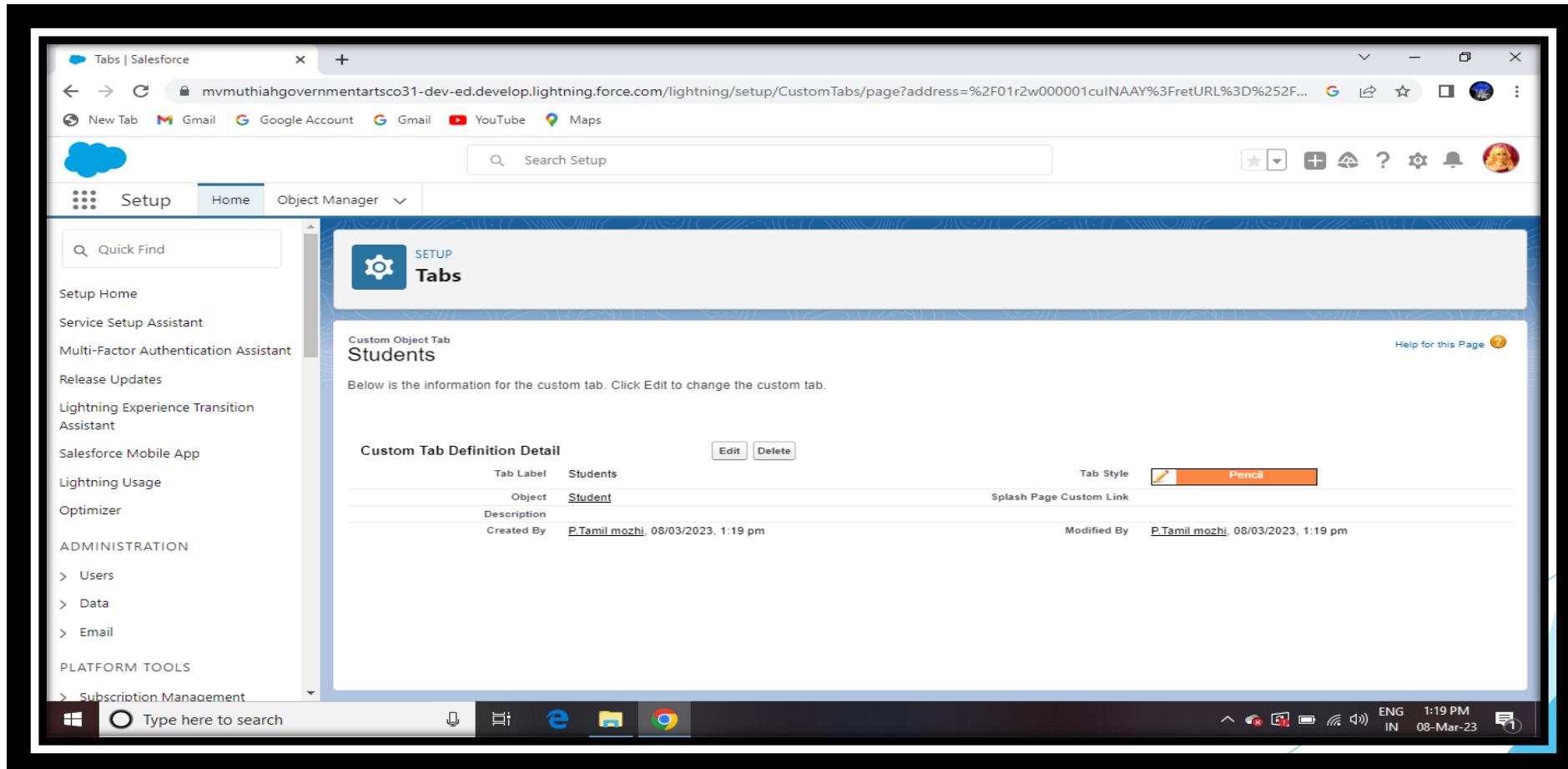
Type here to search

1:15 PM
ENG IN 08-Mar-23

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Fields & Relationships, Page Layouts, and Record Types. The main area displays the 'Details' tab for the 'Student' object. Key fields shown include the API Name ('Student_c'), which is marked as 'Custom'. The singular label is 'Student' and the plural label is 'Students'. Deployment status is listed as 'Deployed'. There are also sections for enabling reports, tracking activities, and field history.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.



Activity 3: Create parent object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - On the Custom Object Definition page, create the object as follows:
 - Label: Parent
 - Plural Label: Parents
 - Record Name: Parent Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox
 - Click Save.

Parent | Salesforce

mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ER9f/Details/view

New Tab Gmail Google Account Gmail YouTube Maps

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

Details

Description

API Name Parent_c
Custom ✓

Singular Label Parent
Plural Label Parents

Enable Reports ✓
Track Activities
Track Field History
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window

Edit Delete

Type here to search

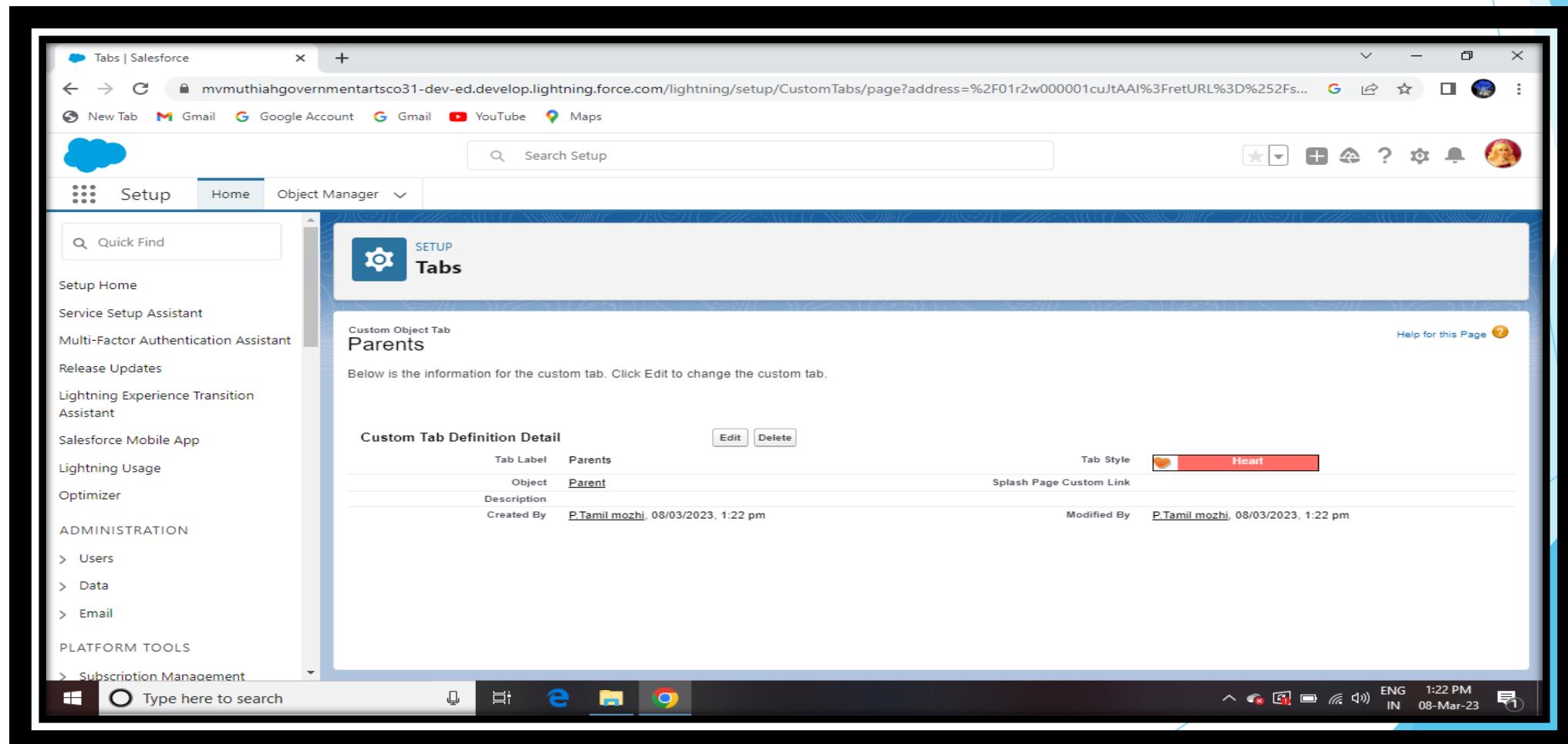
1:21 PM ENG IN 08-Mar-23 1

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Fields & Relationships, Page Layouts, and Record Types. The main area displays the 'Details' for the 'Parent' object. Key fields shown include the API Name (Parent_c), which is marked as Custom. The singular label is set to 'Parent' and the plural label to 'Parents'. Under the 'Enable Reports' section, there is a checked checkbox. The deployment status is listed as 'Deployed'. The top navigation bar includes links for Setup, Home, and Object Manager, along with a search bar and various system icons.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Object Tabs, click New.

1. For Object, select Parents.
 2. For Tab Style, select any icon.
 3. Leave all defaults as is. Click Next, Next, and Save.



Milestone-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 simplest app usually has just two tabs

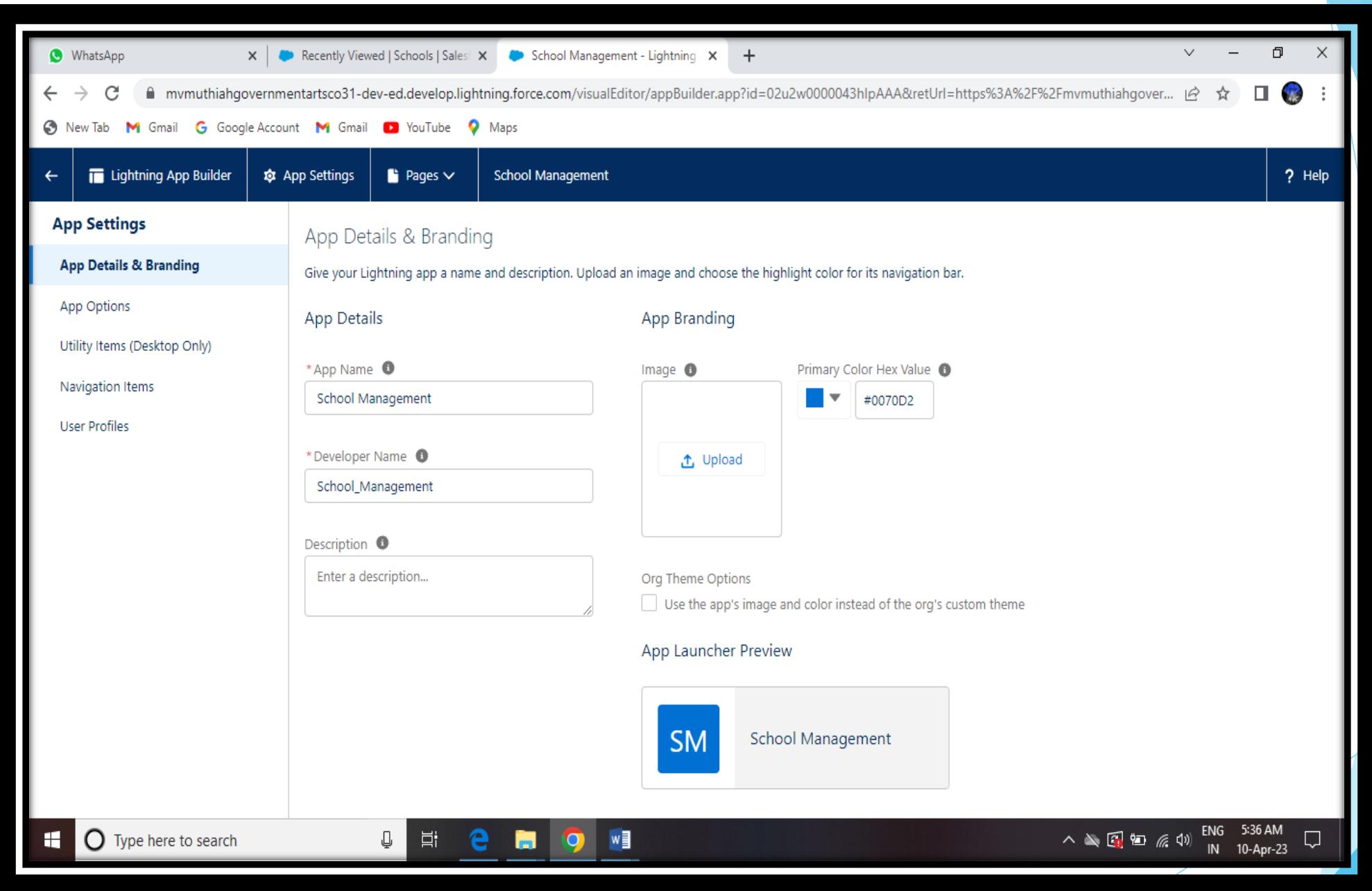
Activity : Create the School Management app

- From Setup, enter App Manager in the Quick Find and select App Manager.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar is the Setup menu, with 'App Manager' selected under the 'Apps' category. The main content area is titled 'Lightning Experience App Manager' and features a 'Clone Apps(Beta)' section with a note about enabling cloning. A table lists 22 items, sorted by App Name, showing details like Developer Name and Last Modified Date. The table includes columns for App Name, Developer Name, Description, Last Modified, and various status indicators.

App Name	Developer Name	Description	Last Modified	Ap...	Vi...
All Tabs	AllTabSet		01/03/2023, 1:31 pm	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	01/03/2023, 1:31 pm	Classic	
App Launcher	AppLauncher	App Launcher tabs	01/03/2023, 1:31 pm	Classic	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	01/03/2023, 1:33 pm	Lightning	

- Click New Lightning App. Enter School Management as the App Name, then click Next
 - Under App Options, leave the default selections and click Next.
 - Under Utility Items, leave as is and click Next.
 - From Available Items, select Schools ,Students ,Parents, Reports, and Dashboards and move them to Selected Items. Click Next.
 - From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
 - To verify your changes, click the App Launcher, type School Management and select the School Management app.



WhatsApp | Recently Viewed | Schools | Sales | School Management - Lightning

mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000043hlpAAA&retUrl=https%3A%2F%2Fmvmuthiahgover...

New Tab Gmail Google Account Gmail YouTube Maps

Lightning App Builder App Settings Pages School Management Help

App Settings

App Details & Branding
App Options
Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list...

Accounts
Alert Settings
All Sites
Alternative Payment Methods
App Launcher
Appointment Invitations
Approval Requests

Selected Items

Schools
Students
Parents
Reports
Dashboards

javascript:void(0);

Type here to search

Windows Start button

5:36 AM 10-Apr-23 ENG IN

WhatsApp | Recently Viewed | Schools | Sales | School Management - Lightning

mvmuthiahgovernmentartsco31-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000043hlpAAA&retUrl=https%3A%2F%2Fmvmuthiahgover...

New Tab Gmail Google Account Gmail YouTube Maps

Lightning App Builder App Settings Pages School Management Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles**

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile

Selected Profiles

System Administrator

javascript:void(0);

Type here to search

5:36 AM
10-Apr-23

The screenshot shows the 'User Profiles' configuration screen in the Salesforce Lightning App Builder. The 'Selected Profiles' list contains 'System Administrator'. The 'Available Profiles' list includes 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticated Website', 'Contract Manager', 'Custom: Marketing Profile', 'Custom: Sales Profile', and 'Custom: Support Profile'. The 'User Profiles' tab is selected in the sidebar.

Milestone -4: Fields and Relationship

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.

Activity-1: Creation of fields for the School objects:

1. click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation, and click New

1 WhatsApp | Recently Viewed | Schools | Sales | Object Manager | Salesforce

mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

New Tab Gmail Google Account Gmail YouTube Maps

Setup Home Object Manager

SETUP Object Manager

51+ Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			

https://mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003ELVW/FieldsAndRelationships/view

Type here to search

6:10 AM IN 10-Apr-23

1 WhatsApp | Recently Viewed | Schools | Sales | School | Salesforce

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New Tab Gmail Google Account Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER School

Details Fields & Relationships

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓

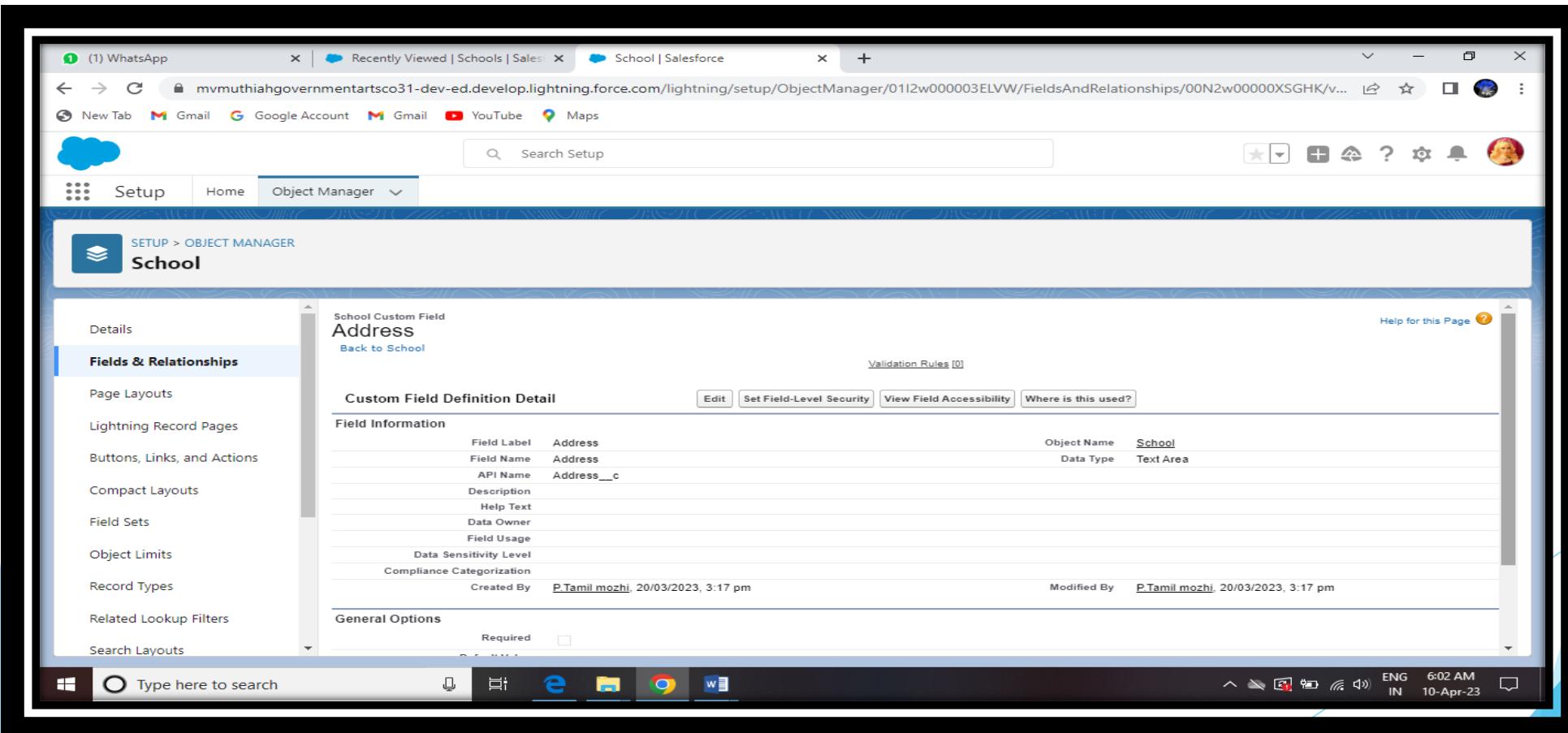
https://mvmuthiahgovernmentartsco31-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/01I2w000003ELVW?detailType=FieldsAndRelationships&setupid=CustomObjects&isdtp=p1

Type here to search

ENG 6:04 AM IN 10-Apr-23

Now we're ready to make a custom field. Let's do this!

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Address.
3. Click Next, Next, then Save & New.
4. Follow steps 1 through 3 and create two more text areas with District , State and School websites as the field labels.



Now let's create the other fields and we must choose the data types of the fields carefully .Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type .

Lets see this

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.

Lets create Roll-up summary fields to calculate the number of students

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Number of students
5. Click Next
6. Then select the master object summarized as students and then select count as roll-up and then click Next , Next and save.

1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Highest Marks
5. Click Next
6. Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate .click Next ,Next and save.

Activity-2: Creation of fields for the Student objects:

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New

Let's create a master-detail relationship with school object

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.

Lets create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Pick-list as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
 6. Pass
 7. Fail
8. Click Next, Next, then Save & New

Lets create a Number field:

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

(1) WhatsApp | Recently Viewed | Schools | Sales | Student | Salesforce

mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ER4y/FieldsAndRelationships/00N2w00000YmlaN/view

New Tab Gmail Google Account Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Student

Student Custom Field Phone Number

Back to Student Validation Rules [0]

Help for this Page ?

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Phone Number	Object Name	Student
Field Name	Phone_Number	Data Type	Phone
API Name	Phone_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By P.Tamil mozhi, 24/03/2023, 1:16 pm Modified By P.Tamil mozhi, 24/03/2023, 1:16 pm

General Options Required

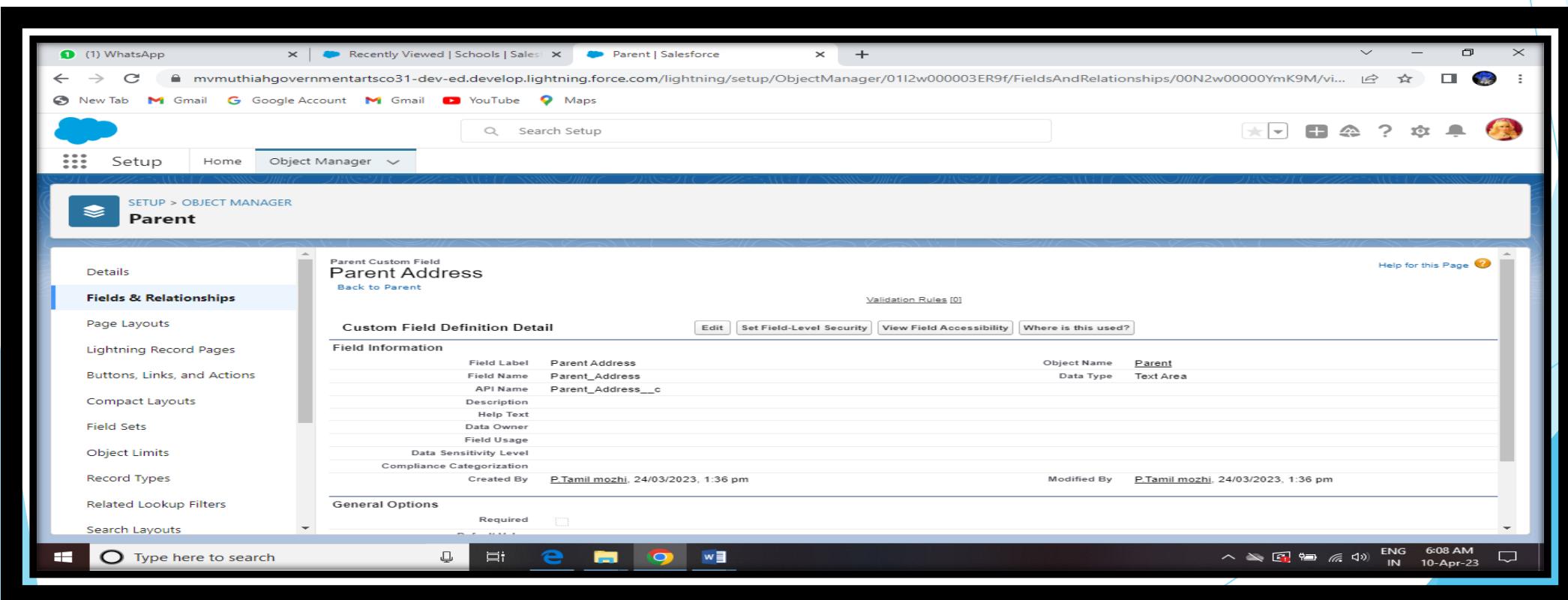
Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts

Type here to search

ENG IN 6:06 AM 10-Apr-23

Activity-3: Creation of fields for the Parent objects:

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Parent Address.
3. Click Next, Next, then Save & New.
4. Select the Phone as the Data Type, then click Next.
5. For Field Label, enter Parent Number.
6. Click Next, Next, then Save & New



Milestone-5: Profile

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, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges

Activity : Creation on profile:

From Setup enter Profiles in the Quick Find box, and select Profiles.

1. From the list of profiles, find Standard User.
2. Click Clone.

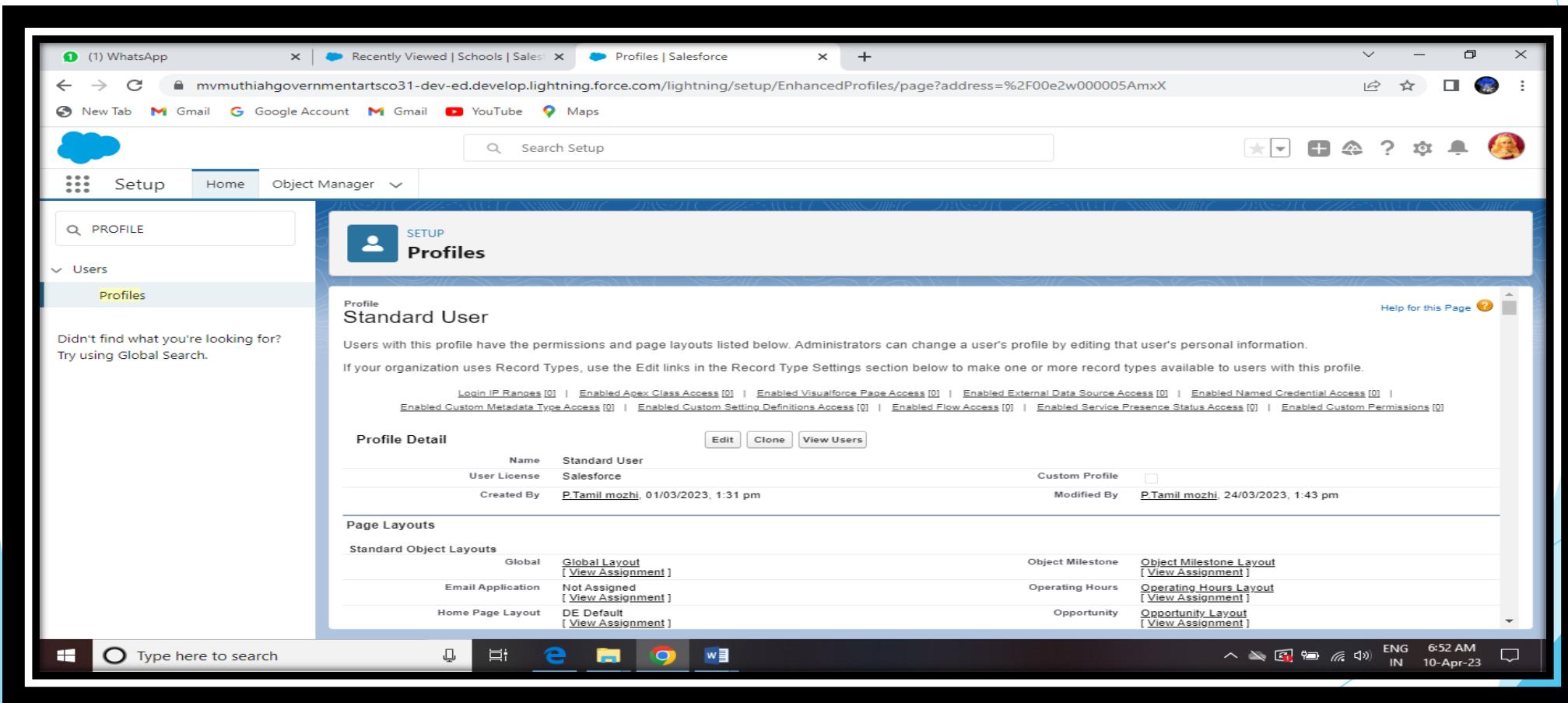
The screenshot shows the Salesforce Profiles page. In the top navigation bar, 'Profiles' is selected under 'Setup'. The main content area is titled 'Profiles' and shows a list of profiles. On the left, there is a sidebar with a search bar and a 'Users' section. The main list includes profiles like 'Read Only', 'School profile', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User', 'System Administrator', and 'Work.com Only User'. To the right of the list, there are columns for 'User License' (e.g., 'Salesforce', 'Salesforce Integration', 'Salesforce', 'Silver Partner', 'Salesforce Platform', 'Salesforce', 'Salesforce', 'Work.com Only') and 'Custom' (checkboxes). One checkbox under 'Custom' is checked for the 'Salesforce' license. At the bottom of the list, there are buttons for 'Edit | Clone' and 'Delete'. The status bar at the bottom indicates 'Page 2 of 2'.

3. For Profile Name, enter School profile.

4. Click Save.

5. While still on the School profile page, then click Edit.

6. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile



Milestone-6: Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity : Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar shows navigation options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, and various mobile app links. The main content area is titled 'Active Users' and displays a table of existing users. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

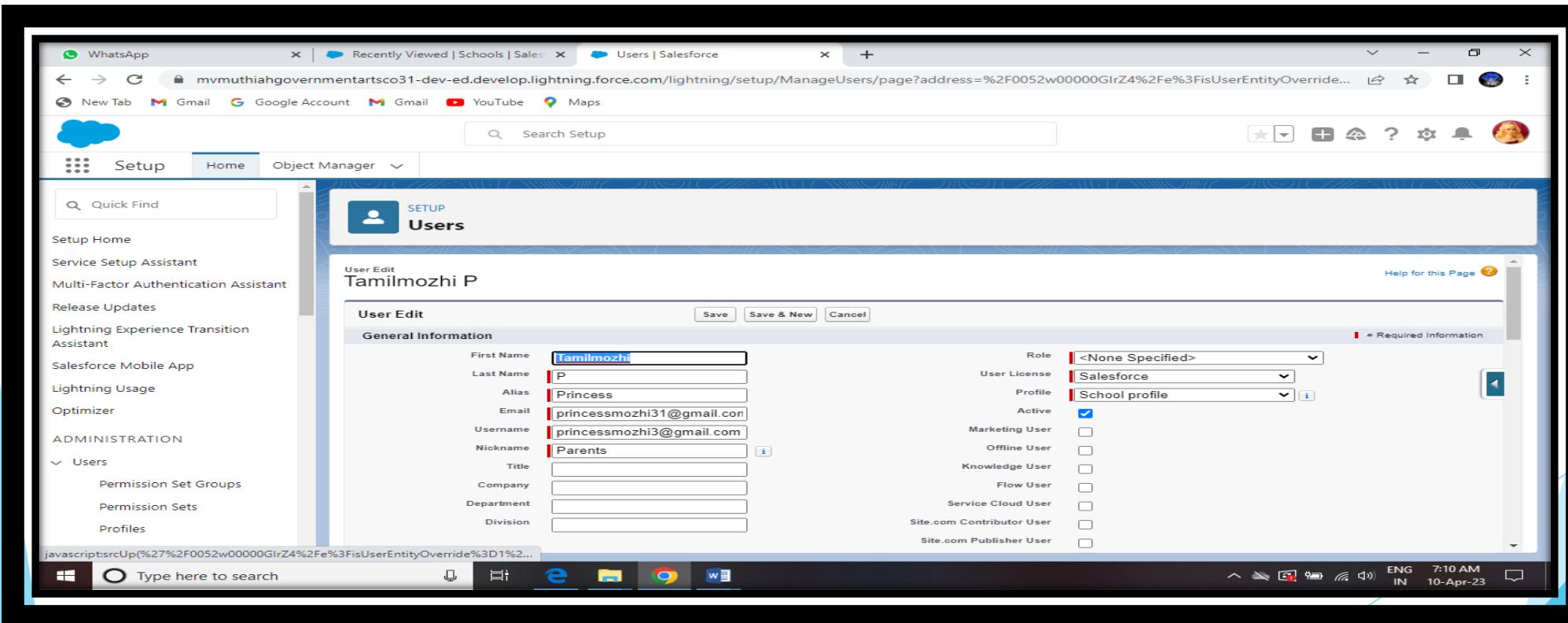
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d2w00000rifthea5_ybfwt7nuj5ka@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	G_Renganayagi	Rengz	princessmozhil0631@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	mozhi_P Tamil	PRINCESS	princessmozhil31@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	P_Tamilmozhil	Princess	princessmozhil3@gmail.com		<input checked="" type="checkbox"/>	School profile
<input type="checkbox"/> Edit	T_Shanmuga_priya	REP	princessmozhil2003@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2w00000rifthea5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2w00000rifthea5.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

3. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.

4. Select a User License As Salesforce .

5. Select a profile as a School profile.

6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



7. Similarly follow the above steps and create 3 users as Teachers and principals.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup Home" and includes links for Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users (which is currently selected). The main content area displays the "User Detail" page for a user named "Tamilmozhi P". The "User Detail" section contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and various Role checkboxes. The "Role" section includes checkboxes for User License (Salesforce), Profile (School_profile), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. Above the "User Detail" section, there is a link to "User ProfileHelp for this Page". The top navigation bar shows tabs for WhatsApp, Recently Viewed | Schools | Sales, and Users | Salesforce, along with browser controls and a user profile icon. The bottom taskbar includes icons for File, Home, Object Manager, and a search bar.

Milestone-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.

Activity-1:

Permission sets 1:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.

The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar navigation includes 'Users' (with 'Permission Set Groups' and 'Permission Sets' selected), 'Feature Settings' (with 'Digital Experiences', 'Sales', 'Accounts', 'Salesforce Scheduler', and 'Assignment Policies'), and 'Salesforce Scheduler'. The main content area displays a table of permission sets with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists several permission sets such as 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', and 'Contact Center Supervisor'. The 'Description' column provides a brief overview of each permission set's functionality, and the 'License' column indicates the specific license required for each. The bottom of the page shows pagination controls and a status bar indicating 'Page 1 of 2'.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User

WhatsApp | Recently Viewed | Schools | Sales | Permission Sets | Salesforce

mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

New Tab Gmail Google Account Gmail YouTube Maps

Cloud icon Search Setup Home Object Manager

PER

Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets

Feature Settings

- Digital Experiences
 - Settings
 - Functions
- Sales
 - Accounts
 - Person Accounts
 - Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler Settings

Permission Set Create

Help for this Page

Enter permission set information

Label:

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

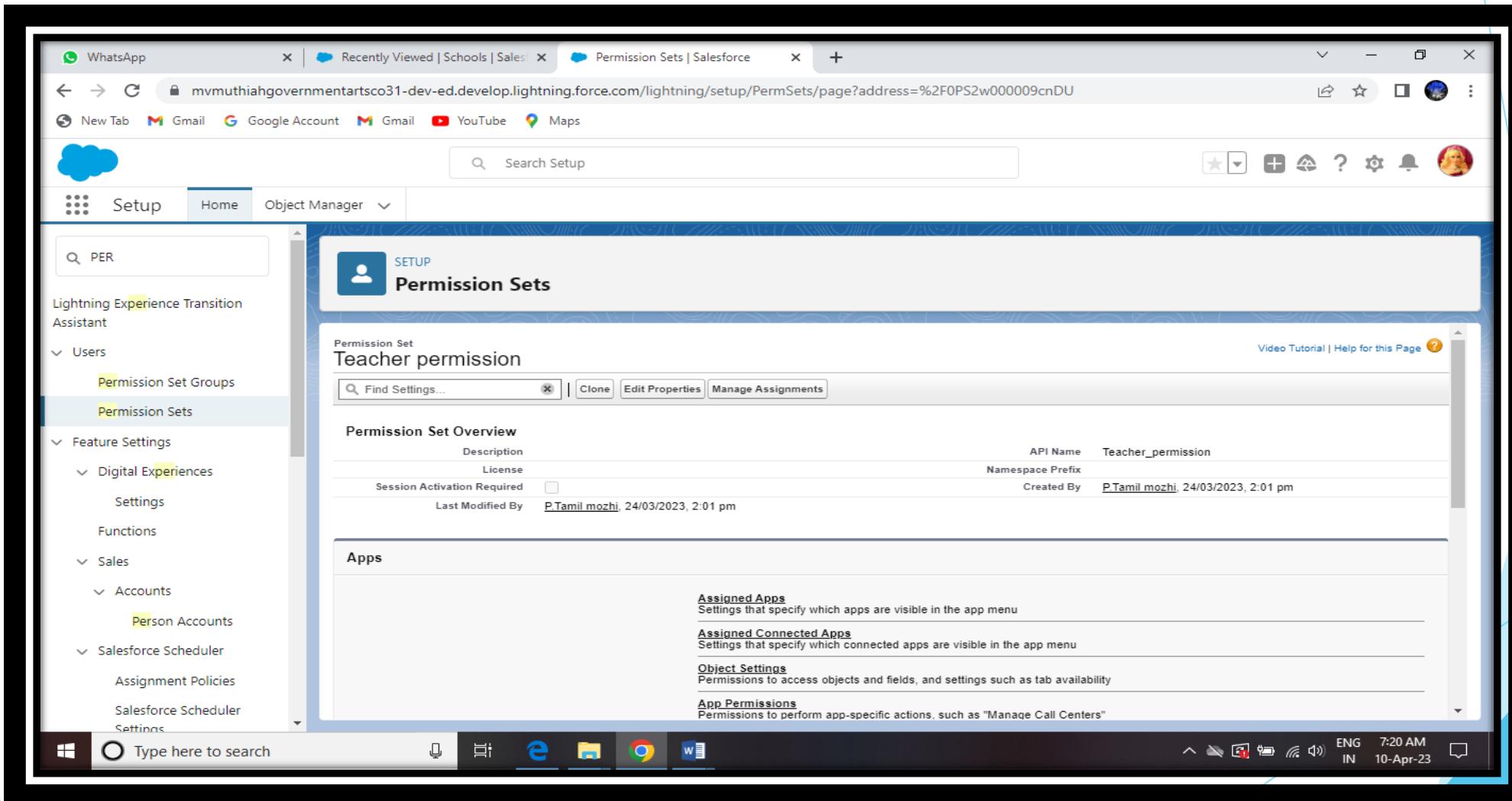
Type here to search

Windows icon

7:25 AM IN 10-Apr-23

The screenshot shows the Salesforce Permission Sets Create page. The left sidebar is collapsed, showing the 'PER' search result. The main area has a title 'Permission Sets' with a 'Create' button. The 'Enter permission set information' section contains fields for 'Label' (empty), 'API Name' (empty), 'Description' (empty), and a checked 'Session Activation Required' checkbox. Below this is a section titled 'Select the type of users who will use this permission set' with a note about choosing license types. The status bar at the bottom shows the date and time.

3. Give the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user



Similarly follow the above steps for the permission set 2.

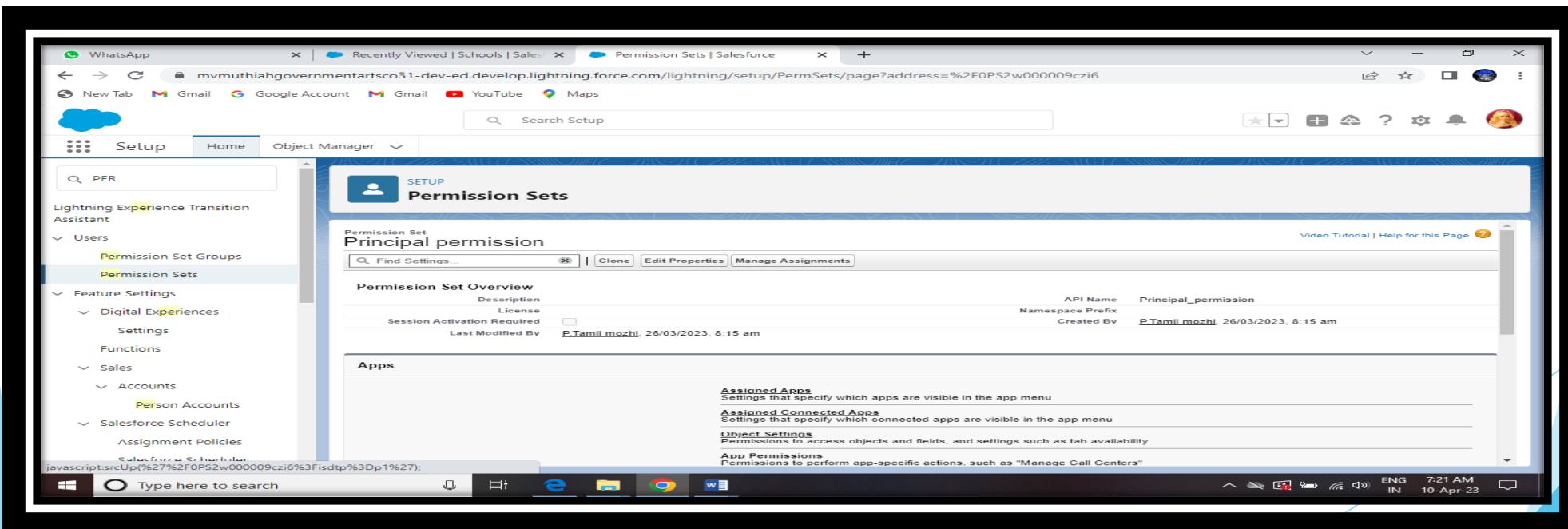
Activity-2:

Permission sets 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.

2. Click New.

3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.

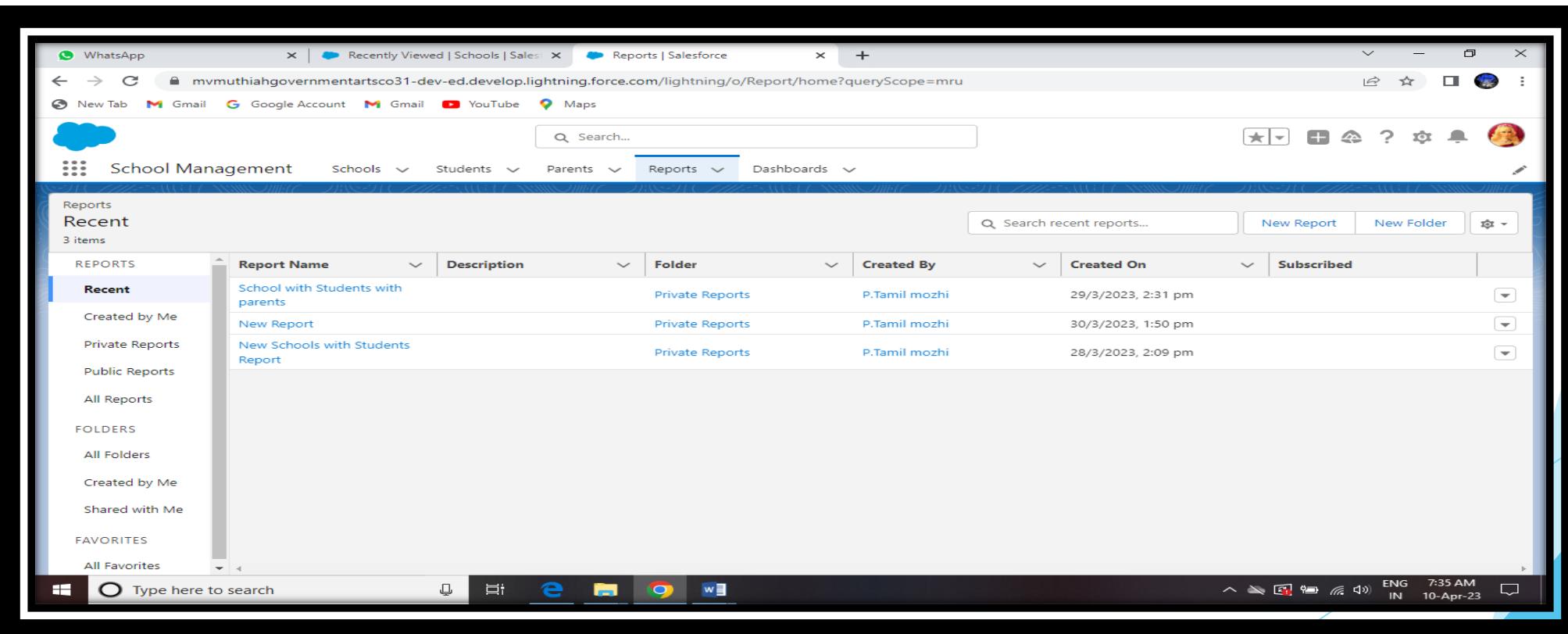


Milestone-8: Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity : Reports :

1. From the Reports tab, click New Report.



The screenshot shows the Salesforce Lightning interface on a Windows desktop. The browser address bar displays the URL: `mvmuthiahgovernmentartsco31-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The page title is "Reports | Salesforce". The top navigation bar includes tabs for "School Management", "Schools", "Students", "Parents", "Reports", and "Dashboards". The "Reports" tab is currently selected. On the left, a sidebar menu is open under the "Reports" section, showing options like "Recent", "Created by Me", "Private Reports", "Public Reports", and "All Reports". The main content area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
School with Students with parents		Private Reports	P.Tamil mozhi	29/3/2023, 2:31 pm	
New Report		Private Reports	P.Tamil mozhi	30/3/2023, 1:50 pm	
New Schools with Students Report		Private Reports	P.Tamil mozhi	28/3/2023, 2:09 pm	

The bottom of the screen shows the Windows taskbar with icons for File Explorer, Edge, Google Chrome, and Word, along with system status indicators like battery level, signal strength, and volume.

2. Select the report type as School with students and parents for the report, and click Create.

The screenshot shows a Salesforce Report Builder interface. At the top, there are tabs for WhatsApp, Recently Viewed | Schools | Sales, and Report Builder | Salesforce. Below the tabs, the browser address bar shows a URL starting with mvmuthiahgovernmentartsco31-dev-ed.develop.lightning.force.com. The page header includes a search bar, a star icon, a plus sign, a question mark, a gear icon, a bell icon, and a user profile picture. The main navigation menu has items: School Management, Schools, Students, Parents, Reports (which is currently selected), and Dashboards. A sub-menu for Reports is open, showing categories like Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, and Activities. The main content area is titled "Create Report" and contains a "Select a Report Type" section. It shows a search bar with "Search Report Types..." and a table with one row: "Report Type Name" (Parent with Schools with Students) and "Category" (Custom). To the right of this is a "Details" panel for the selected report type. The "Details" panel title is "Parent with Schools with Students" (Custom Report Type). It includes a "Start Report" button, a "Details" tab (which is active and shows the report's description and fields), and a "Fields (9)" section. At the bottom of the "Details" panel, there are "Description" (Parent with Schools with Students), "Created By You" (New Report), and a "New Report" button. The bottom of the screen shows a Windows taskbar with icons for File Explorer, Edge, Google Chrome, and Word, along with system status indicators like battery level, signal strength, and date/time (7:35 AM, 10-Apr-23).

3. Customize your report, then save or run it.

The screenshot shows the Salesforce Report Builder interface. At the top, there are tabs for WhatsApp, Recently Viewed | Schools | Sales, and Report Builder | Salesforce. The URL in the address bar is mvmuthiahgovernmentartsco31-dev-ed.lightning.force.com/lightning/r/Report/00O2w00000DsxFzEAJ/edit?queryScope=userFolders. Below the address bar, there are links for New Tab, Gmail, Google Account, YouTube, and Maps.

The main header includes a blue cloud icon, a search bar with placeholder "Search...", and various navigation icons. The top navigation bar has categories: School Management, Schools, Students, Parents, Reports (which is selected), and Dashboards.

The report title is "New Schools with Students Report" under the "REPORT" dropdown. The report name is "Schools with Students".

The report preview shows a table with three rows. The columns are "School: School Name" and "Student: Student Name".

	School: School Name	Student: Student Name
1	M.V.Muthiah Government Arts college For Women	P.Tamilmozhi
2	GTN arts college	A.Princessmozhi
3	M.V.Muthiah Government Arts college For Women	K.Ratha

On the left side, there are sections for "Groups" (with "GROUP ROWS" and "Add group...") and "Columns" (with "Add column...", "School: School Name", and "Student: Student Name"). There is also a "Filters" section with a count of 1.

At the bottom right of the report area, there is a toggle switch for "Update Preview Automatically".

The bottom of the screen shows the Windows taskbar with icons for File Explorer, Edge, Google Chrome, and Microsoft Word. The system tray shows the date and time as "10-Apr-23" and "7:44 AM".

WhatsApp x | Recently Viewed | Schools | Sales x School with Students with parent x +

mvmutthiahgovernmentartsco31-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000DtK87EAF/view?queryScope=userFolders

New Tab Gmail Google Account Gmail YouTube Maps

School Management Schools Students Parents Reports Dashboards

Report: Schools with Students
School with Students with parents

Total Records	Total Highest Marks	Total Number of students	Total Marks	Total Class			
3	200	3	299	3			
School: School Name	Address	School websites	School: ID	District	State	Phone Number	Highest Marks
1 M.V.Muthiah Government Arts college For Women	Kanyakumari Road , Meenachinayakkanpatti, Dindigul-624001	mvmwgacdgl.ac.in	a002w00000asOJP	Dindigul	Tamil Nadu	+91-2460120	
2 M.V.Muthiah Government Arts college For Women	Kanyakumari Road , Meenachinayakkanpatti, Dindigul-624001	mvmwgacdgl.ac.in	a002w00000asOJP	Dindigul	Tamil Nadu	+91-2460120	
3 GTN arts college	Karur Road, N.S.Nagar ,Dindigul-624005	gtnartscollege.ac.in	a002w00000asOJQ	Dindigul	Tamil Nadu	7397783313	
4							

Type here to search

7:36 AM ENG IN 10-Apr-23

CONCLUSION:

· Salesforce is a great platform and, easy to use, powerful, quick as well as have good community. This project showed in the above text, what concept of cloud computing and Salesforce is all about. After reading this paper you easily know, that Salesforce offers a conclusive concept to deliver an easy to use CRM Software as a service using a dynamic scale free cloud computing approach and also how to make college management system using sales force. So Salesforce.com is an excellent example for an e-Commerce company, management of information in college, universities, with mobile friendly Salesforce application, these reports would be accessible anywhere, anytime.

THANK YOU