

NAAN MUDHALVAN

SALESFORCE PROJECT REPORT

COLLEGE: **M.E.T ENGINEERING COLLEGE**

TITTLE: **Creation of an Application for school Management**

BATCH-1

NAME	NM ID	REG NO
MANOJI S	F4991679DE7B09484C5409BD83362D7B	961320114001
MOHAMED AFSAL M	E8A3DDBF1D71302B12945AD24AAA3471	961320114002
SAHAYA PENIEL S	F992EEAFE2F1849AB55464508A85BE32	961320114003
SAYADALI S	81F1F03D5659794AE564F8F6846B8547	961320114004

Step 1: Create a Salesforce Account

The screenshot shows a Salesforce user profile for 'Lawrance Victor'. The profile includes a profile picture of a cat, a bio that says 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)', and a 'Details' section with fields for Name, Title, Manager, and Company Name. The 'Related' section shows a list of files. The interface is in English and the user is logged in as 'Lawrance Victor'.

Choose Your Tour ▾ Leave Feedback Days left in trial 28 Notifications

Search...

Your Account Your Account schools students parents ▾ * Lawrance Victor ▾ X

Lawrance Victor Edit User Detail

Share your awesomeness with the world.
(Or at least with your colleagues on Chatter.)

Learn new skills on Trailhead, the fun way to learn Salesforce.
Connect with fellow Trailblazers on the Trailblazer Community.

Details

▼ About

Name Lawrance Victor Title
Manager Company Name Scad cet

▼ Contact

Related

Files (3+)

- Sales 19-Oct-2023 • 5KB • png
- Sales_operation 19-Oct-2023 • 4KB • png
- relationship_management

90°F Haze Search 5:14 PM 10/20/2023

Step 2 : Create the Objects(School , Student , Parent)

The screenshot shows the Salesforce Object Manager interface. The 'parent' custom object is listed with the API name 'parent_c' and type 'Custom Object'. The interface includes a search bar, a 'Schema Builder' button, and a 'Create' button. The table below shows the details of the 'parent' object.

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Search Setup

Setup Home Object Manager ▾

Object Manager 1 items, Sorted by Label

parent

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
parent	parent_c	Custom Object		20/10/2023	✓

Recently Viewed | schools | Salesforce | school | Salesforce | Object Manager | Salesforce

site-agility-575.lightning.force.com/lightning/setup/ObjectManager/home

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Search Setup

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SETUP
Object Manager
1 Items, Sorted by Label

school school__c Custom Object 20/10/2023 ✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
school	school__c	Custom Object		20/10/2023	✓

Recently Viewed | schools | Salesforce | school | Salesforce | Object Manager | Salesforce

site-agility-575.lightning.force.com/lightning/setup/ObjectManager/home

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Search Setup

Setup Home Object Manager ▾

SETUP
Object Manager
1 Items, Sorted by Label

student student__c Custom Object 20/10/2023 ✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
student	student__c	Custom Object		20/10/2023	✓

Step 3 : Create Fields for respective objects(School , Student , Parents)

Browser tabs: Your Account | student | Sales | Your Account | student | Sales | New schools | Home | Sales | Flows | Sales | Flows | Sales | Student flow |

Address bar: site-agility-575.lightning.force.com/lightning/setup/ObjectManager/0115g000004E6PV/FieldsAndRelationships/view

Choose Your Tour | Leave Feedback | Days left in trial 29 | Buy Now

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
student

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
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)		✓

90°F Haze | Search | ENG IN | 5:17 PM 10/20/2023

Browser tabs: Your Account | parent | Sales | Your Account | student | Sales | New schools | Home | Sales | Flows | Sales | Flows | Sales | Student flow |

Address bar: site-agility-575.lightning.force.com/lightning/setup/ObjectManager/0115g000004E6PI/FieldsAndRelationships/view

Choose Your Tour | Leave Feedback | Days left in trial 29 | Buy Now

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
parent

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

6 Items, Sorted by Field Label

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		

90°F Haze | Search | ENG IN | 5:17 PM 10/20/2023

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Search Setup

Setup Home Object Manager ▾

school

Details

Fields & Relationships

11 Items, Sorted by Field Label

Q 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	CreatedBy	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX student)		
Last Modified By	LastModifiedBy	Lookup(User)		
Number of Student	Number_of_Student__c	Roll-Up Summary (COUNT student)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
school Name	Name	Text(80)		✓

90°F Haze Search ENG IN 5:17 PM 10/20/2023

New parent | Salesforce

site-agility-575.lightning.force.com/lightning/o/parent__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=1...

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school management schools ▾ students ▾ parents ▾ Reports ▾ Dashboards ▾

parents

Recently Viewed

0 items • Sorted by parent Name ▾

parent Name ▾

New parent

* = Required Information

Information

* parent Name Owner Lawrance Victor

Parent Address

Parent Number

Cancel Save & New Save

New student | Salesforce

site-agility-575.lightning.force.com/lightning/o/student_c/new?count=5&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=1...

Choose Your Tour

Leave Feedback Day 29 Buy Now

New student

* = Required Information

Information

*student Name

Phone Number

Email

*school

Results

Class

Marks

Cancel Save & New Save

New school | Salesforce

site-agility-575.lightning.force.com/lightning/o/school_c/new?count=4&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=1...

Choose Your Tour

Leave Feedback Day 29 Buy Now

New school

* = Required Information

Information

*school Name

Address

District

State

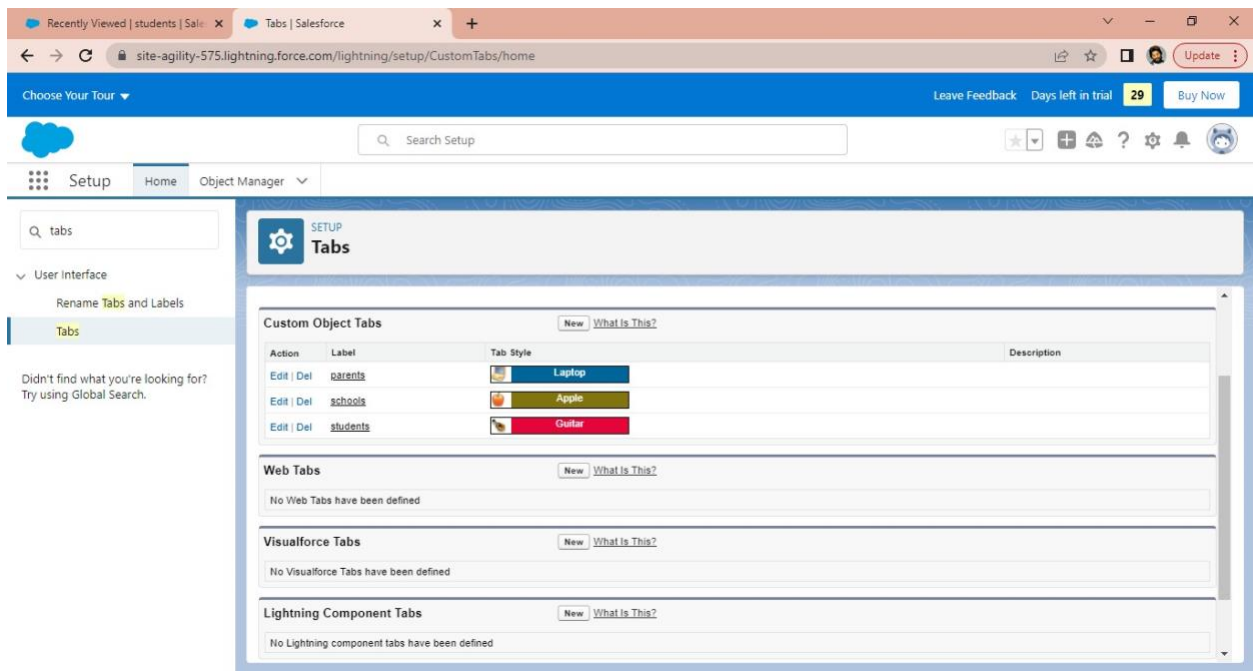
Phone Number

School Website

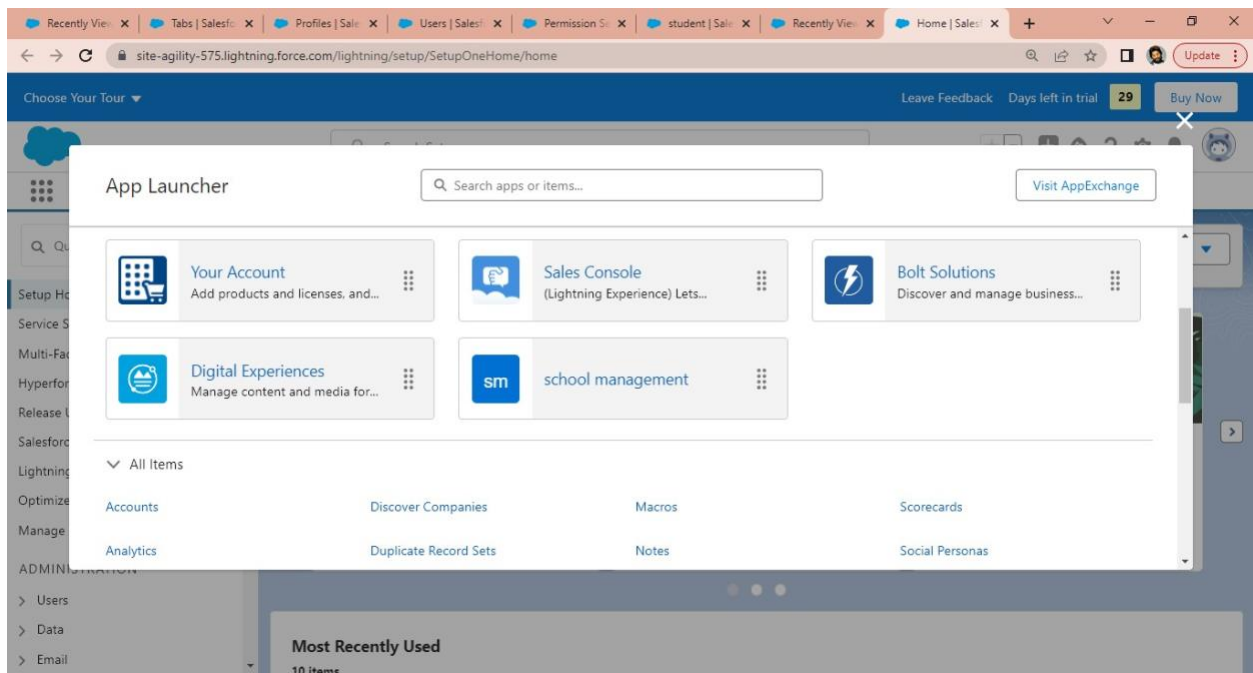
Owner Lawrance Victor

Cancel Save & New Save

Step 4 : Create the Tabs for each object(School, student, Parent)



Step 5 : Create a Lightning App



Step 6 : Create the School Profile

The screenshot shows the Salesforce Setup page for the 'School profile'. The left sidebar has a search bar with 'profile' and a list of options including 'Users' and 'Profiles'. The main content area is titled 'SETUP Profiles' and 'Profile School profile'. It includes a description of the profile and a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is a 'Connected App Access' section with a checkbox for 'CPQ Integration User Connected App' and a 'Service Provider Access' section. The 'Administrative Permissions' section is also visible.

Profile School profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Field	Value
Name	School profile
User License	Chatter Free
Description	
Created By	Laurance Victor 20/10/2023, 2:31 pm
Modified By	Laurance Victor 20/10/2023, 2:31 pm

Connected App Access

CPQ Integration User Connected App ☐

Service Provider Access

Administrative Permissions

Step 7 : Create the users(Teacher , Parent , Principal)

The screenshot shows the Salesforce Setup page for 'All Users'. The left sidebar has a search bar with 'users' and a list of options including 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area is titled 'SETUP Users' and 'All Users'. It includes a description of the page and a 'View' dropdown menu. Below this is a table of users with columns for Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'Parent', 'Principal', 'Sponsor Exec', 'Teachers', and 'Victor Laurance'.

SETUP Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

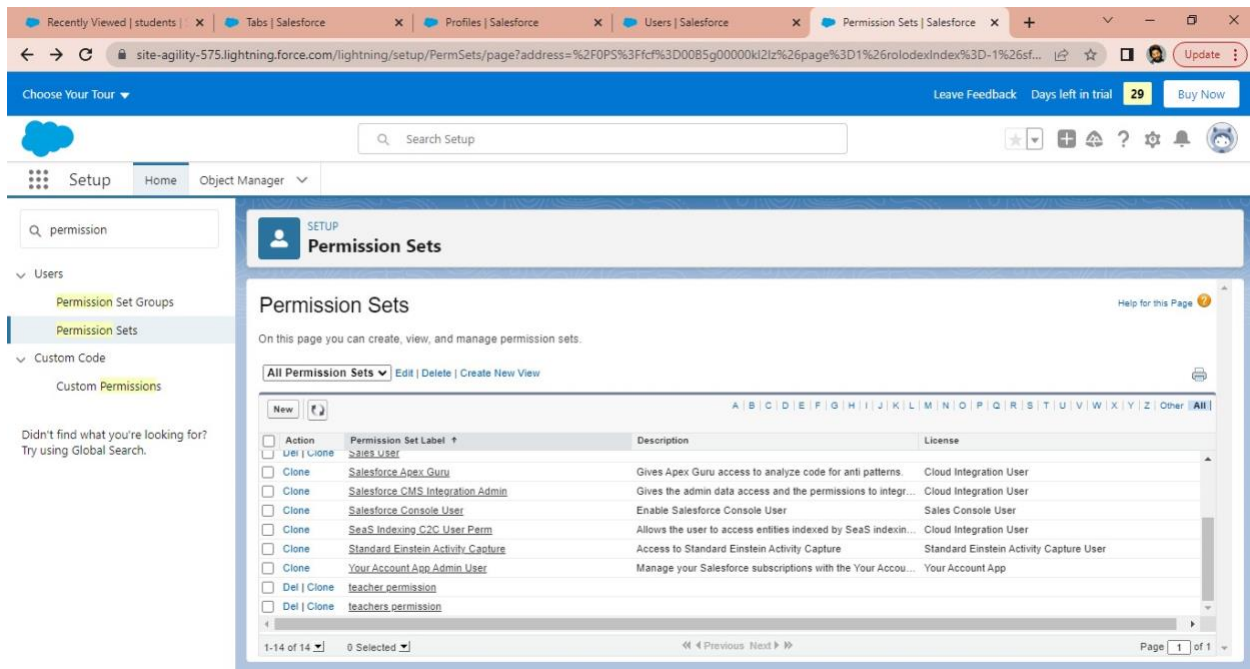
View: [All Users](#) [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter_00d5900000kmbheal.kfm49v2jq@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
Edit	Parent	pare	laurancein72@gmail.com	20/10/2023, 3:00 pm		<input checked="" type="checkbox"/>	Standard User
Edit	Principal	prin	khore@gmail.com			<input checked="" type="checkbox"/>	Standard User
Edit	Sponsor Exec	esoon	execsponsord4mfunnvop49.mblvyluxisk0.houcarviewdv@example.com			<input type="checkbox"/>	End User
Edit	Teachers	teac	mmprince4508@gmail.com			<input type="checkbox"/>	Standard User
Edit	Victor Laurance	LVid	laurancein72-136@force.com	20/10/2023, 7:09 pm		<input checked="" type="checkbox"/>	System Administrator

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Step 8 : Create the Permission Set for the User's

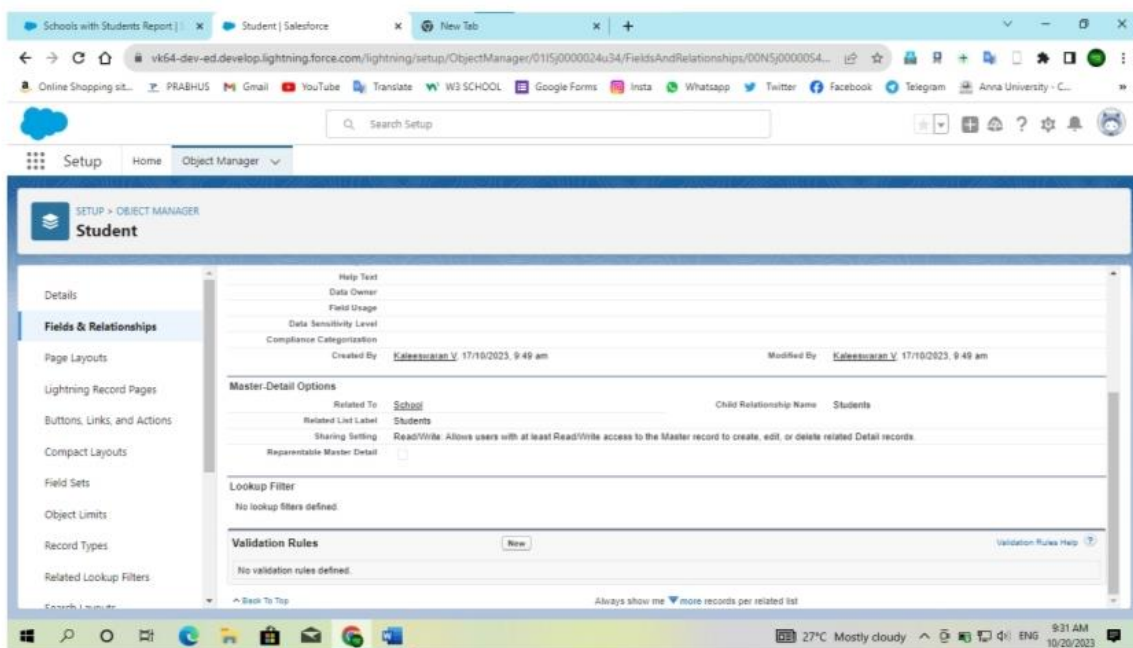


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "permission" entered. Under the "Users" section, "Permission Set Groups" and "Permission Sets" are visible. The main content area is titled "Permission Sets" and includes a sub-header "On this page you can create, view, and manage permission sets." Below this is a table of "All Permission Sets".

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Sales User		
<input type="checkbox"/> Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integr...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexin...	Cloud Integration User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/> Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Accou...	Your Account App
<input type="checkbox"/> Del Clone	teacher.permission		
<input type="checkbox"/> Del Clone	teachers.permission		

At the bottom of the table, it says "1-14 of 14" and "0 Selected".

Step 9 : Create Master Detail relationship



The screenshot shows the Salesforce Object Manager for the "Student" object. The left sidebar has a search bar with "Student" entered. Under the "Fields & Relationships" section, "Fields & Relationships" is selected. The main content area is titled "Student" and includes a sub-header "Details". Below this is a form for "Master-Detail Options".

Master-Detail Options

Related To: School

Child Relationship Name: Students

Related List Label: Students

Sharing Setting: Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

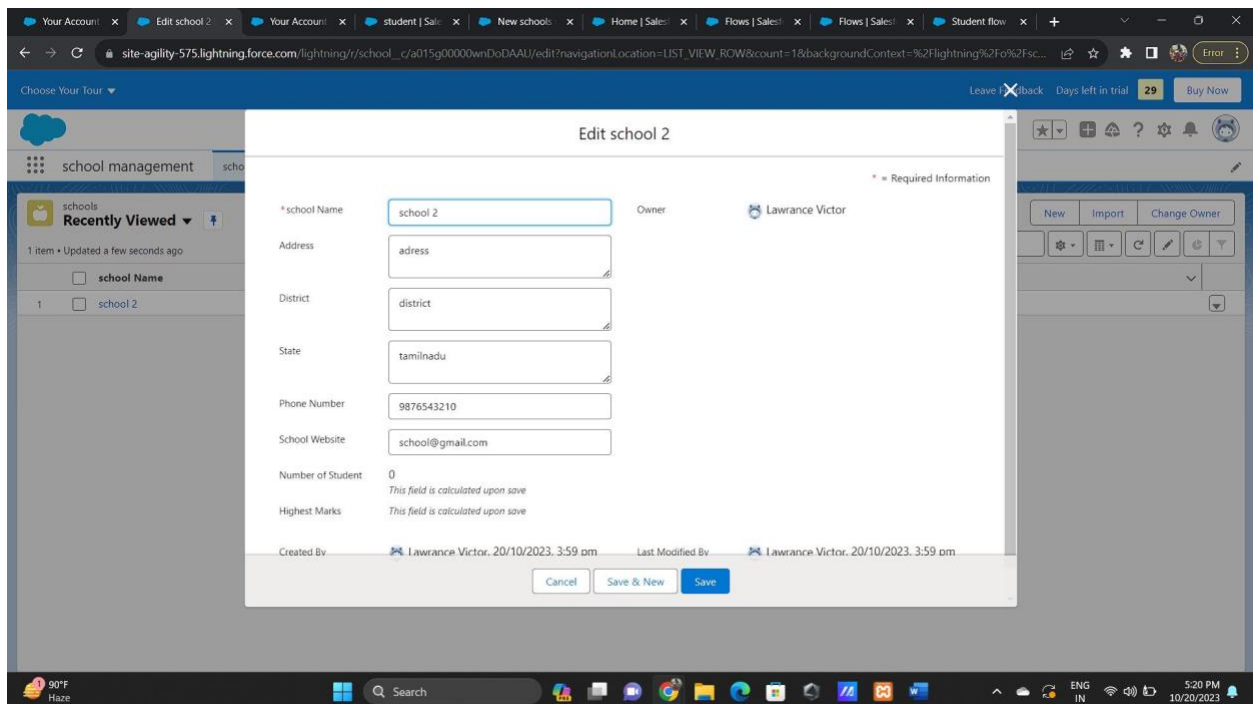
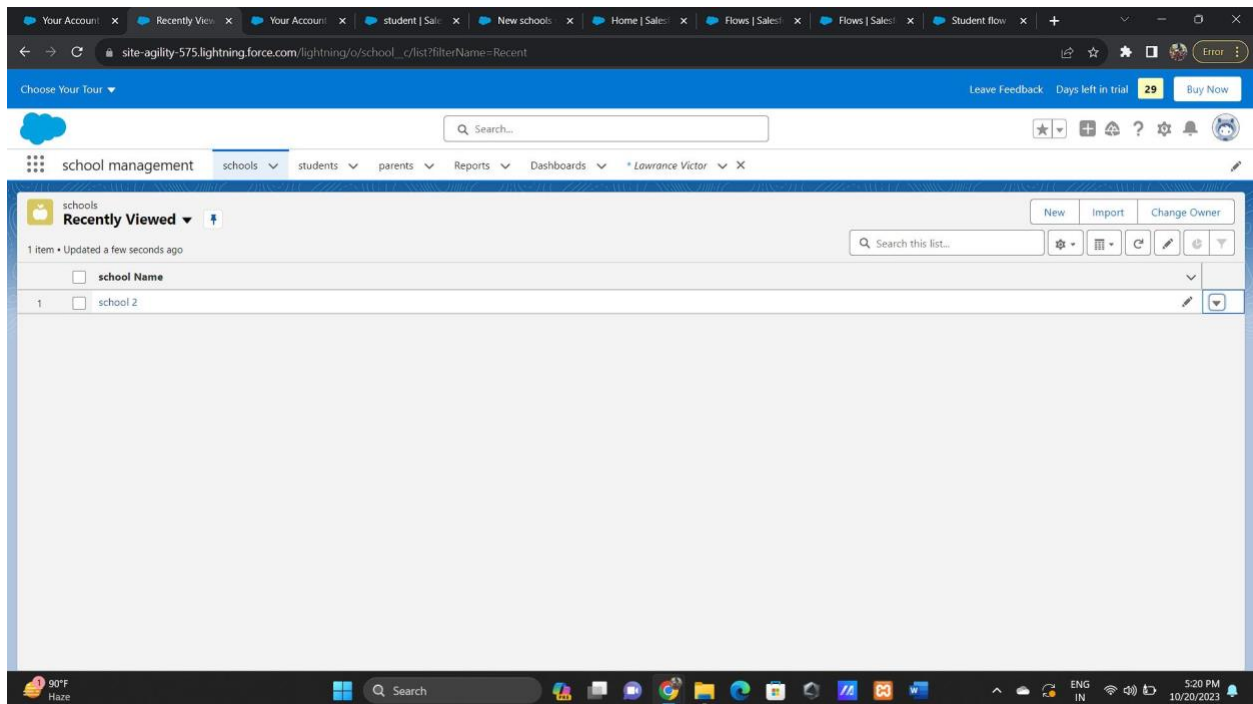
Reparentable Master Detail: ☐

Lookup Filter: No lookup filters defined.

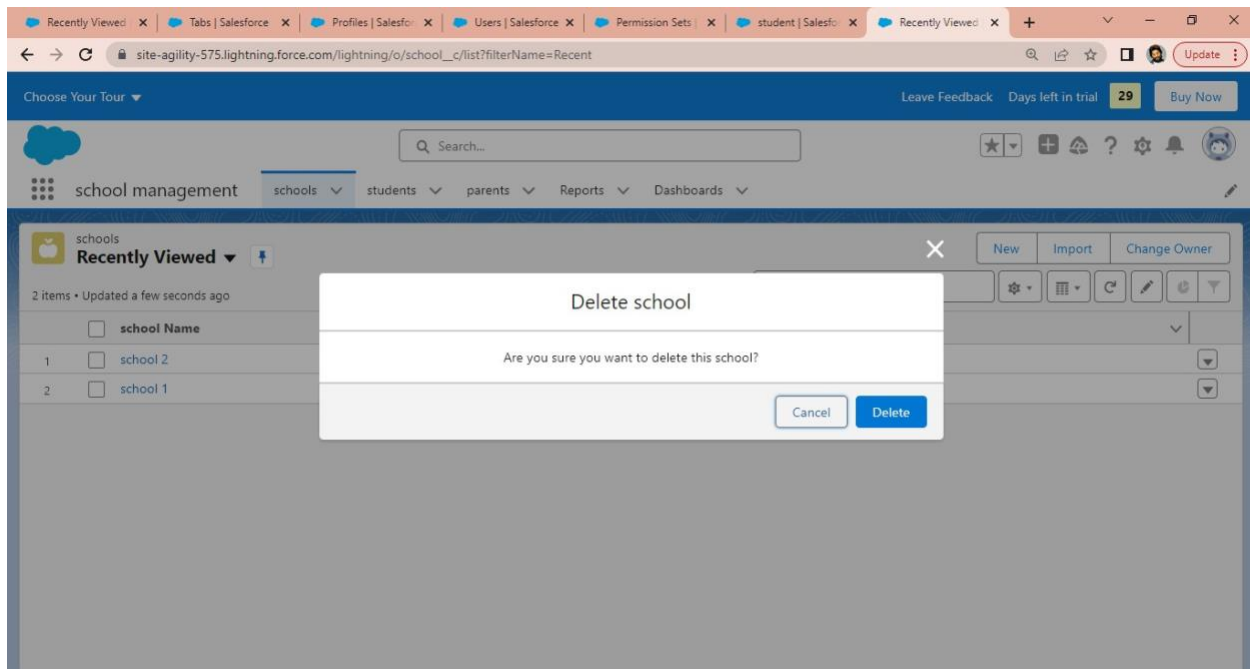
Validation Rules: No validation rules defined.

At the bottom, it says "Always show me more records per related list".

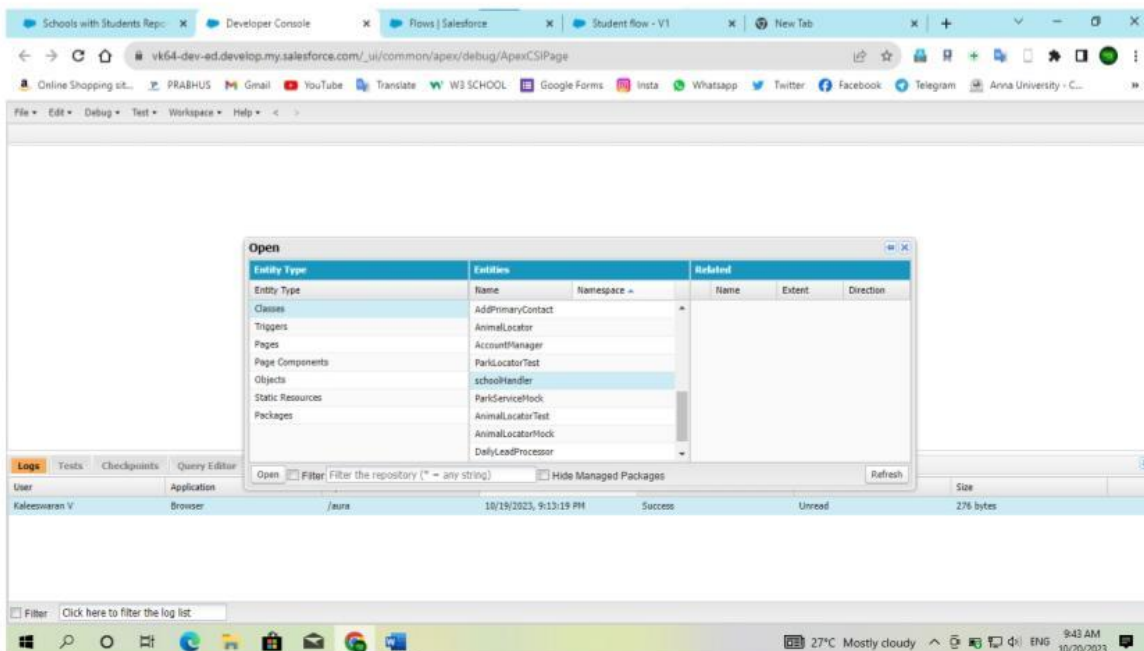
Step 10 : Create Records in Lightning App

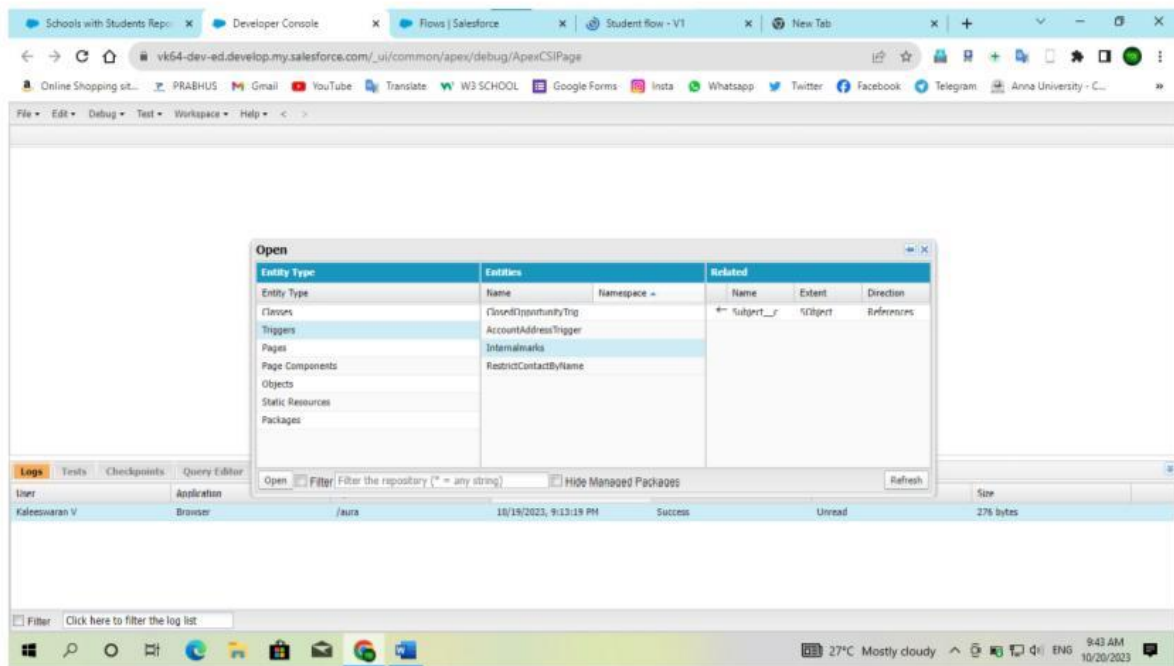


Step 11 : Deleting Records

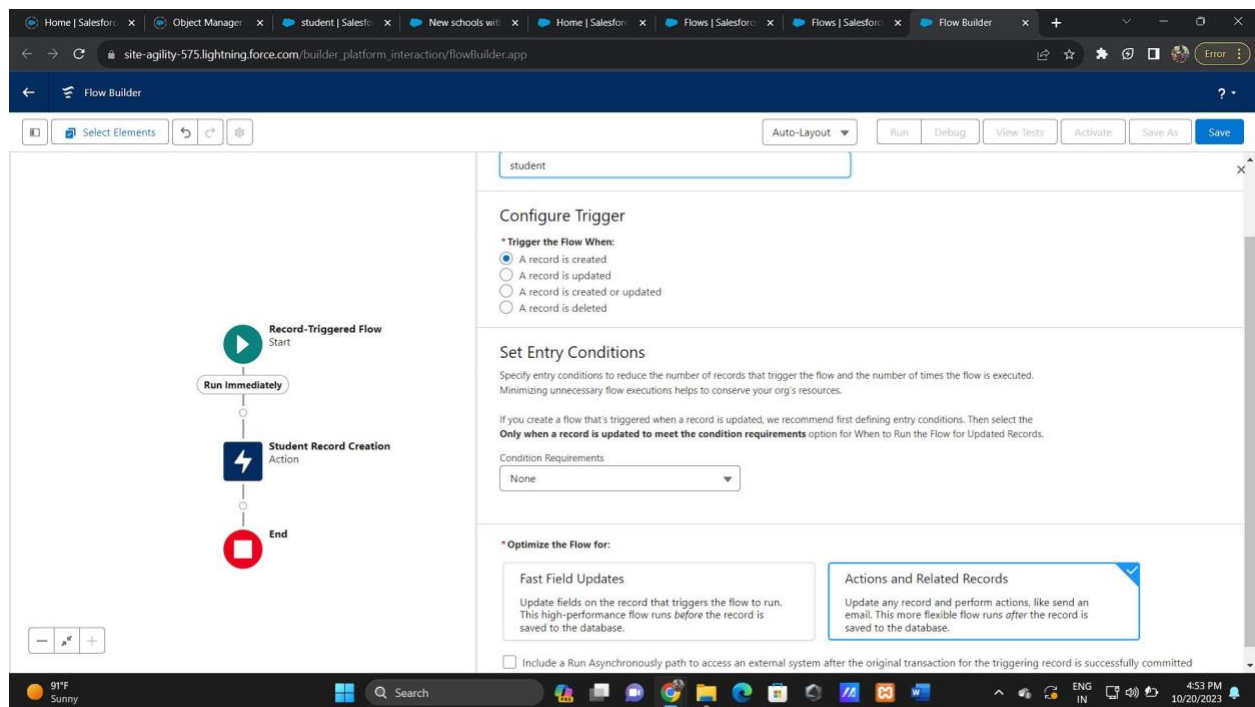


Step 12 : Create Apex Class and Apex Trigger





Step 13 : Create A Flow



Step 14 : Create Reports

The screenshot displays a Salesforce interface with a report titled "New schools with students Report". The report is currently empty, showing "Total Records: 0". The interface includes a navigation bar with tabs for "Recently Viewed", "Tabs | Salesforce", "Profiles | Salesforce", "Users | Salesforce", "Permission Sets", "student | Salesforce", and "New schools with students". The URL in the address bar is "site-agility-575.lightning.force.com/lightning/r/Report/0005g00000JQP99EAH/view?queryScope=userFolders". The report header includes a search bar, a "Choose Your Tour" dropdown, and buttons for "Leave Feedback", "Days left in trial 29", and "Buy Now". The report body features a large illustration of a cactus and a sun. The footer shows a row of toggle switches for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are currently turned on.

Report: schools with students
New schools with students Report

Enable Field Editing

Total Records
0

No Results

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒