

# **PROJECT REPORT ON**

## **Creation Of An Application For School Management**

### **(DEVELOPER)-(SHORTTERM)**

**INTORDUCTION:** 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 to those professionals who are in cross technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as wel

**Milestone 01:** Create Salesforce Org Go to

[developers.salesforce.com/Signup](https://developers.salesforce.com/Signup)

Click on sign up.

On the sign-up form, enter the following details:

1. First name & Last name – Bhanupriya Yamuka
2. Email: bhanubhanu0511@gmail.com
3. Role :Developer
4. Company: GAYATRI DEGREE COLLEGE
5. Country: India
6. Postal Code: 517501

7.

First Name\*

Bhanupriya

Last Name\*

Yamuka

Email\*

bhanubhanu0511@gmail.com

Role\*

Developer

Company\*

GAYATRI DEGREE COLLEGE

Country/Region\*

India

State/Province\*

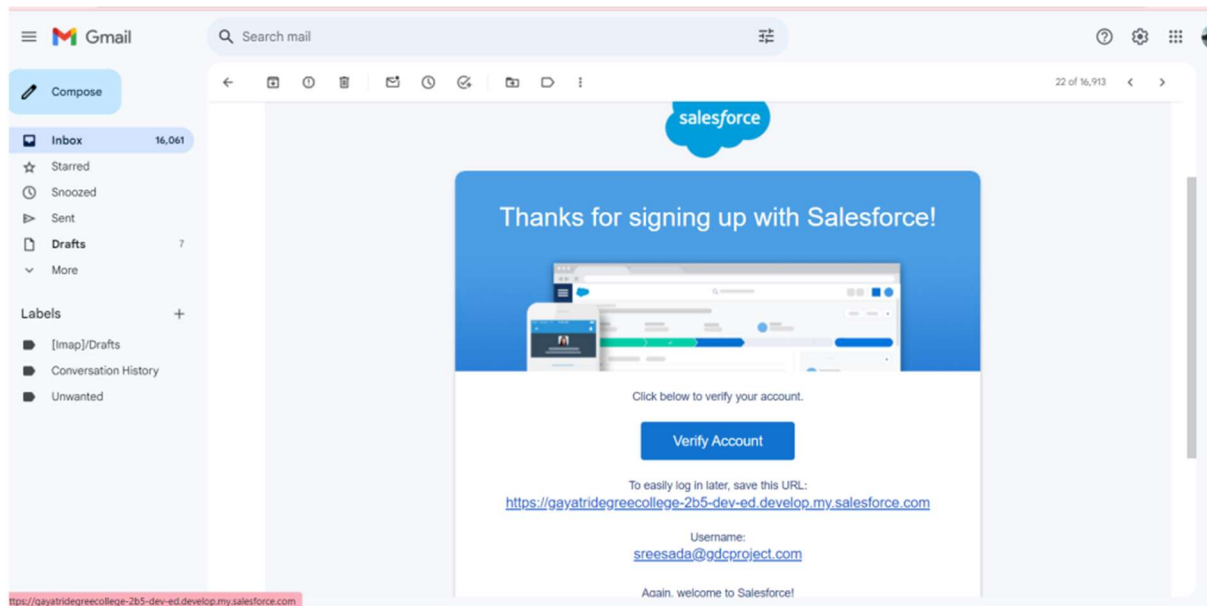
Andhra Pradesh

Postal Code\*

7.username:y.bhanupriya@gdcproject.com

## 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

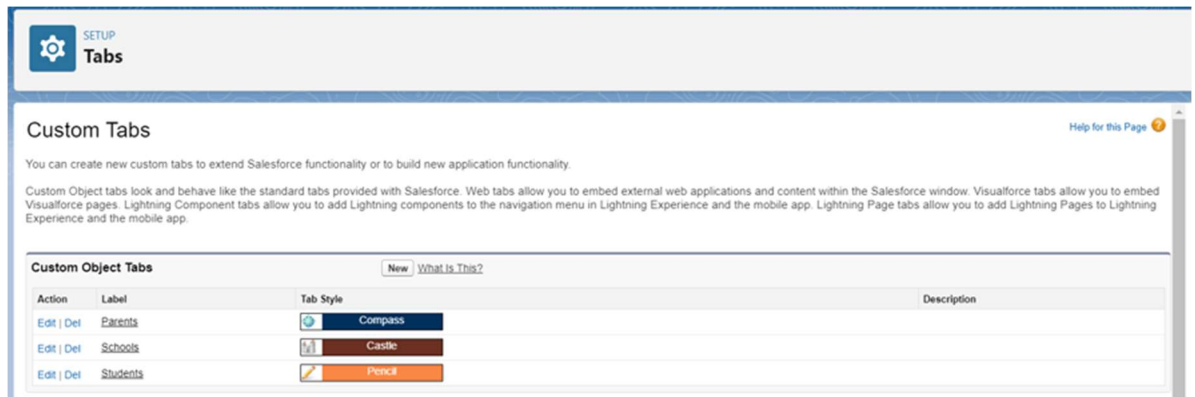
1. Go to [salesforce.com](https://salesforce.com) and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see

### Milestone 02 – Creation of Object

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](https://salesforce.com) such as users, contracts, reports, dashboards, etc.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		07/10/2023	✓
Student	Student__c	Custom Object		07/10/2023	✓
School	School__c	Custom Object		07/10/2023	✓

- **Custom Objects:** School, Student, Parent.

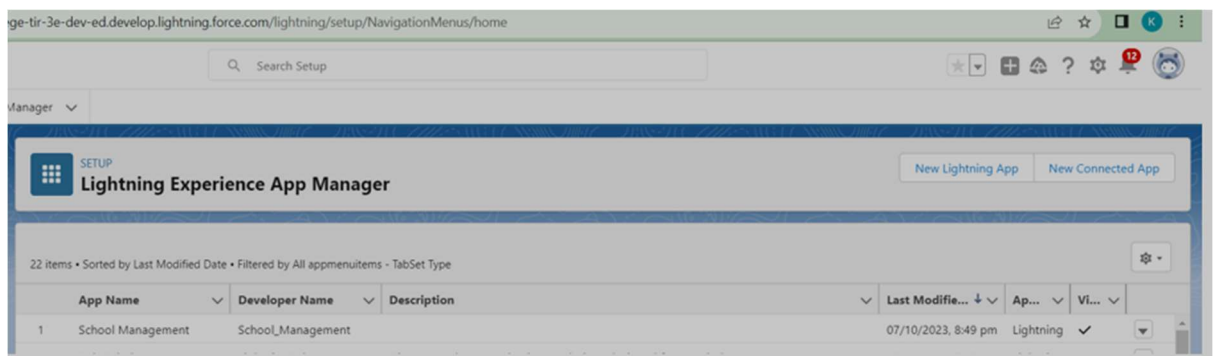


## Milestone 03 - Lightning App

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.

### ➤ Create The School Management App

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter School Management as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to  
Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save &  
Finish.



## Milestone 04 – 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.

### ➤ Fields in School Object:

Setup Home Object Manager

SETUP > 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	CreatedById	Lookup(User)		
District	District__c	Text(50)		
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)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School website	School_website__c	URL(255)		
State	State__c	Text(50)		

## Fields in Student Object:

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

Details

**Fields & Relationships**

9 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
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)		✓

## Fields in Parent object:

Setup Home Object Manager

SETUP > OBJECT MANAGER

Parent

Details

**Fields & Relationships**

6 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
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		

## Milestone 05 – Profile

### Creation On Profile

1. From Setup enter Profiles in the Quick Find box
2. Select Profiles.
3. Click new, From the list of profiles, find Standard User (profile to clone)

4. For Profile Name, enter School Profile
5. Click Save.
6. While still on the School profile page, then click Edit.
7. Scroll down to Custom Object Permissions and Give view all access permissions.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'School Profile' is selected. Below the profile name, there is a description and a list of permissions. The 'Profile Detail' section shows the profile name, user license, and creation/modification details.

**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 [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

**Profile Detail** [Edit] [Clone] [Delete] [View Users]

Name	School Profile
User License	Salesforce
Description	Custom Profile ✓
Created By	Sowmyalakshmi Lakkur, 08/10/2023, 8:15 pm
Modified By	Sowmyalakshmi Lakkur, 09/10/2023, 10:50 pm

## Milestone 06 – Users

### ➤ Creating A User

#### ❖ User - Parent

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name as Sardar Basha and email address and a unique username in the form of an email address.
5. By default, the username is the same as the email address.
6. Select a User License as salesforce.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

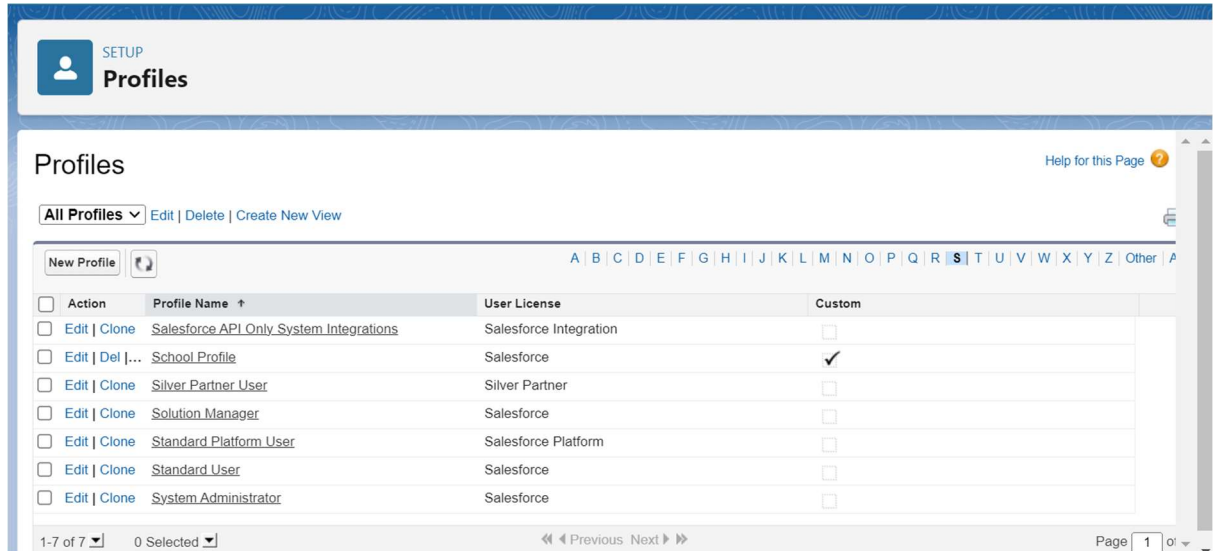
#### ❖ User – Teacher

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name as Madhu sudhan podipattu and email address and a unique username in the form of an email address.
5. By default, the username is the same as the email address.
6. Select a User License as salesforce.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately.

#### ❖ User – Principal

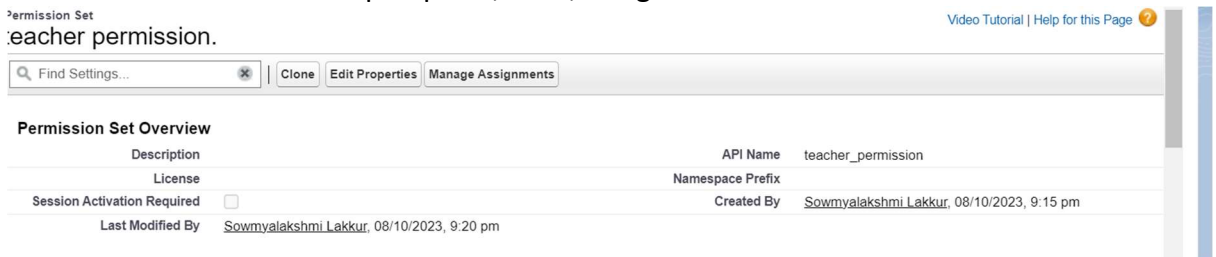
- From Setup, in the Quick Find box, enter Users
- Select Users.

- Click New User.
- Enter the user's name as Neeraja mam and email address and a unique username in the form of an email address.
- By default, the username is the same as the email address.
- Select a User License as salesforce.
- Select a profile as a School profile.
- Check Generate new password and notify the user immediately.



## Milestone 07 - Permission Sets

- **Permission Sets 1**
  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 teacher permission.
  4. Under the object settings give the view all, create and edit permissions to School, student, and teacher custom objects.
  5. Click on manage assignment
  6. Click on add assignment.
  7. Click on madhu sudhan podipattu, Next, Assign.



- **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.

4. Under the object settings give the view create and edit permissions to School, student, and teacher custom objects.
5. Click on manage assignment
6. Click on add assignment.
7. Click on Neeraja mam, Next, Assign.

Permission Set Video Tutorial | Help for this Page

Principal permission

Find Settings... Clone Edit Properties Manage Assignments

**Permission Set Overview**

Description	API Name	Principal_permission
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Sowmyalakshmi Lakkur, 08/10/2023, 8:57 pm
Last Modified By	Sowmyalakshmi Lakkur, 10/10/2023, 12:21 pm	

## Milestone 08 - User Adoption

### ➤ Create Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools tab.
4. Click new button
5. Fill all School record details.
6. Click on Save Button.

School Management Schools Parents Students Reports Dashboards

Schools Recently Viewed

pm • Updated a few seconds ago

Search this list...

school Name

GAYATRI HIGH SCHOOL

### ➤ View Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on any record name. you can see the details of the School.

School Management Schools Parents Students Reports Dashboards

School GAYATRI HIGH SCHOOL

New Contact Edit New Opportunity

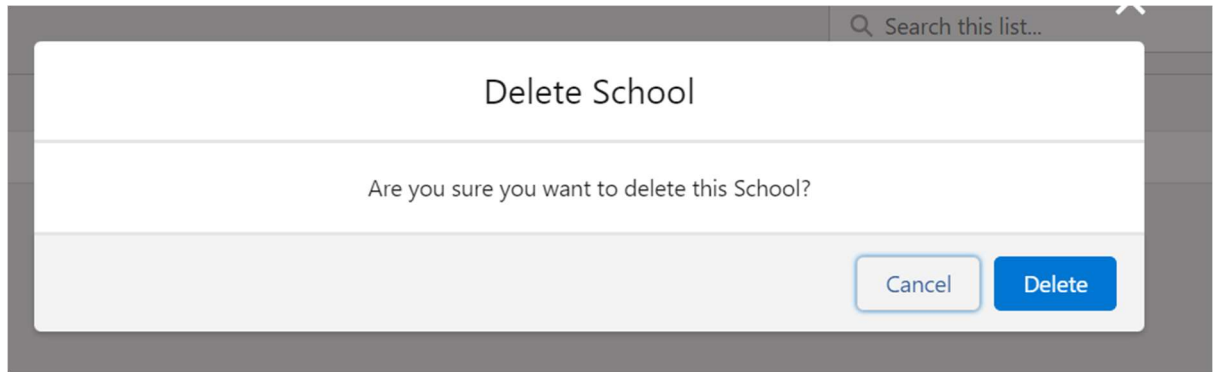
Related Details

school Name	GAYATRI HIGH SCHOOL	Owner	Sowmyalakshmi Lakkur
Address	#164, PRAKASAM ROAD, TIRUPATI		
District	TIRUPATI		
State	ANDHRA PRADESH		
SchoolWebsite	www.gayatri.com		
Phone Number	08772233402		
Number of students	2		



➤ **Delete Record (School)**

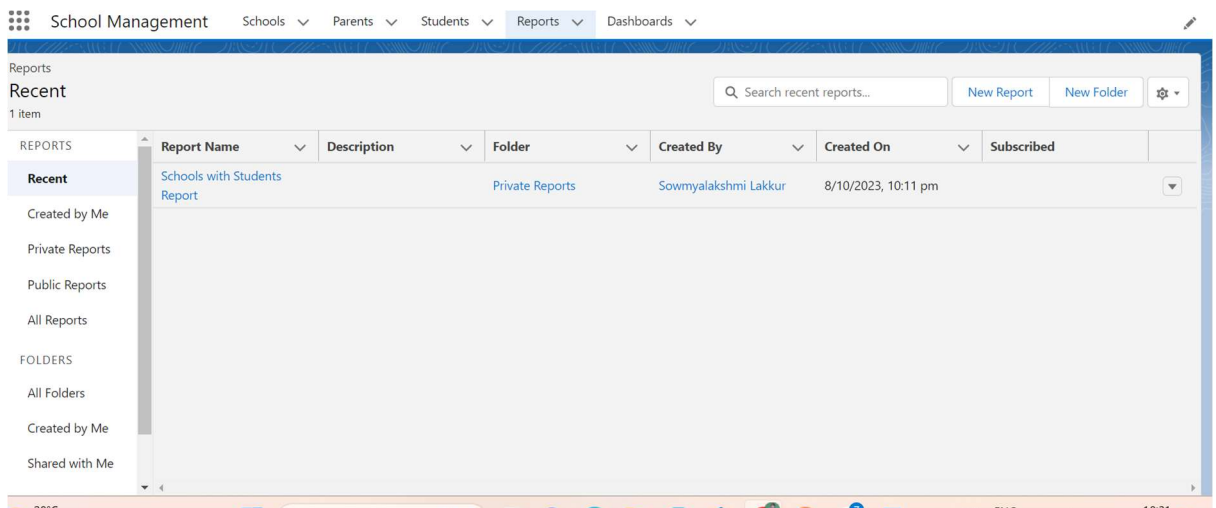
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



➤ **Milestone 09 – Reports**

➤ **Create Report:**

1. In School Management App click Reports tab.
2. Click New Report.
3. Select the report type as School with students and parents for the report.
4. Click start report.
5. Customize your report, then save and run
6. Give report name – Schools with Students Report
7. Click Save



➤ **Milestone 10 – Triggers**

➤ **Write A Trigger**

write a trigger whenever the school website is null you should be unable to delete the record.

1. Go to the gear icon and select the developer console.

2. From the menu bar click on file and select Apex class.
3. Now give the class name as schoolHandler.
4. Now Write the below code and save.

```

1 public class schoolHandler {
2     public static void beforeDelete(list<School__c> oldlist){
3         for(School__c s : oldlist){
4             if(s.School_website__c == null ){
5                 s.addError('you cannot delete the record');
6             }
7         }
8     }
9 }

```

- From the menu bar click on file and select Apex trigger.
- Now give the trigger name as Internalmarks
- Select Object as School
- Now Write the below code and save.


```

1 trigger SchoolTrigger on School__c (before delete) {
2     if(trigger.isDelete){
3         if(trigger.isBefore){
4             schoolHandler.beforeDelete(trigger.old);
5         }
6     }
7 }

```

## Milestone 11 – Flows

- **Create Flow**
  1. Click on Gear icon and select setup
  2. In Quick find Box enter flow and select the flows
  3. Click on New flow and Select Record triggered Flows.
  4. In the search bar type student and click done.
  5. Select (+)
  6. type action and select send Email.
  7. Enter the following details
  8. Label:Student Record Creation
  9. Api Name:Student\_Record\_Creation( Auto-pupulated)
  10. Body: Hi {!\$Record.Name} , we are happy to inform you that you have joined in our {!\$Record.school\_\_r.Name}.
  11. Subject: Record Creation
  12. Recipient email Address:{!\$Record.Email\_\_c}
  13. click on done and Click on save
  14. Flow label: Student flow
  15. Flow API Name: Student\_flow
  16. and then click Activate.

 **Flows**

Flow

Student flow

[« Back to List: Flows](#)

Help for this Page

Flow Detail

EditOpenRunDelete

Flow Label	Student flow	Flow API Name	Student_flow
Description		Namespace Prefix	
		Type	Autolaunched Flow
Environments	Default	URL	/flow/Student_flow
Active Version	1	Activated/Deactivated By	Sowmyalakshmi Lakkur
Trigger	Record—Run After Save	Created By	Sowmyalakshmi Lakkur
Modified By	Sowmyalakshmi Lakkur, 10/10/2023, 9:58 am		

*The End*