

PROJECT REPORT ON

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

Introduction:

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 crosstechnology 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.

Milestone 01 –Creating Admin Org

Go to developer.salesforce.com Click on sign up.

- On the sign up form, enter the following details
- First name & Last name - Koneti Gari Lohith Reddy
- Email - lohithr654@gmail.com
- Role - SALESFORCE ADMIN
- Company - Sree Vidhyanikethan-Rangampeta
- Country - India
- Postal Code - pin code 517501
- Username - lohithr654@gmail.com

The screenshot shows the Salesforce Developer Edition sign-up page. The browser address bar displays developer.salesforce.com/signup. The page features a blue background with a white sign-up form on the right. The form includes the following fields:

- First Name*: KONETI GARI
- Last Name*: LOHITH REDDY
- Email*: lohithr654@gmail.com

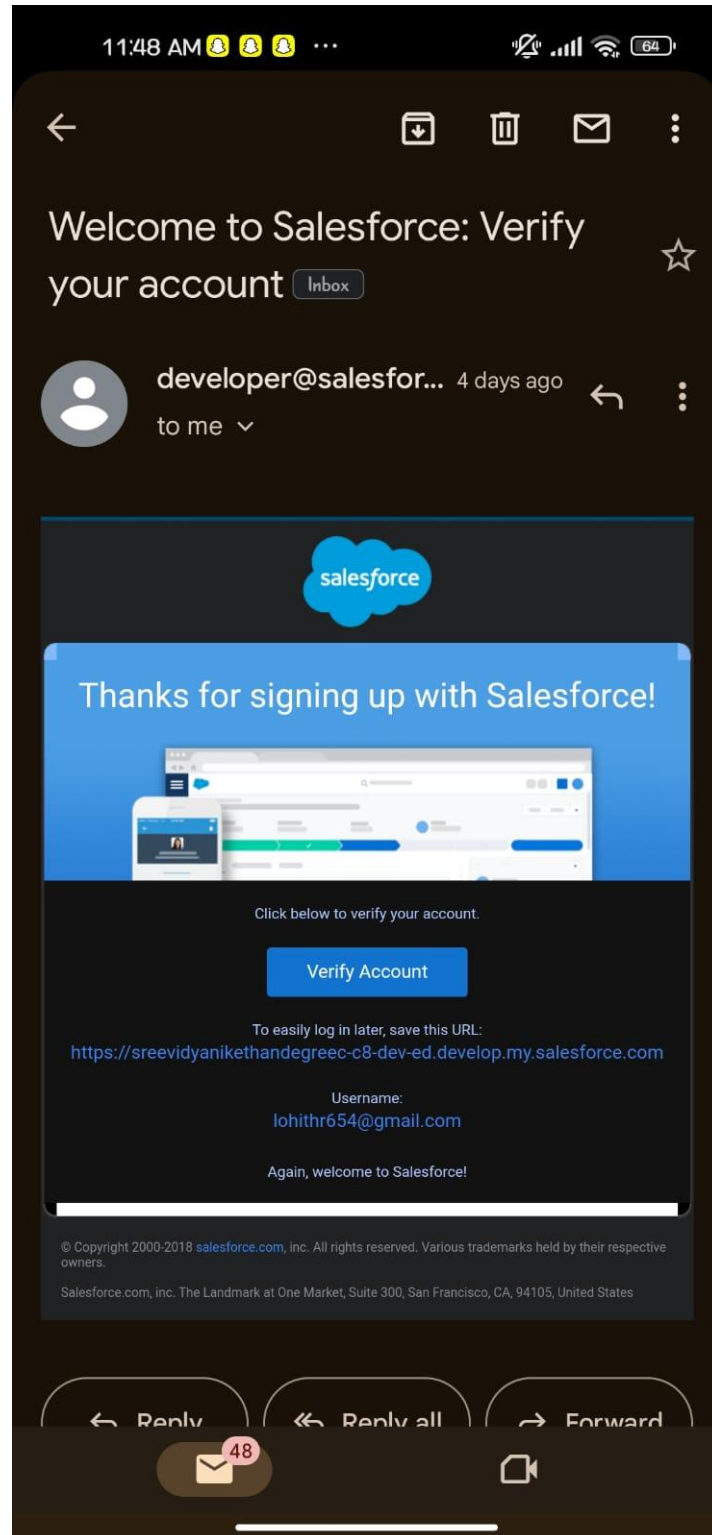
Below the form, there is a 'Sign up' button. The page also includes a section on the left titled 'Build enterprise-quality apps fast to bring your ideas to life' with a list of bullet points:

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web

The bottom of the screenshot shows the Windows taskbar with the search bar, task view button, and various application icons. The system clock indicates 11:47 AM on 16-10-2023.

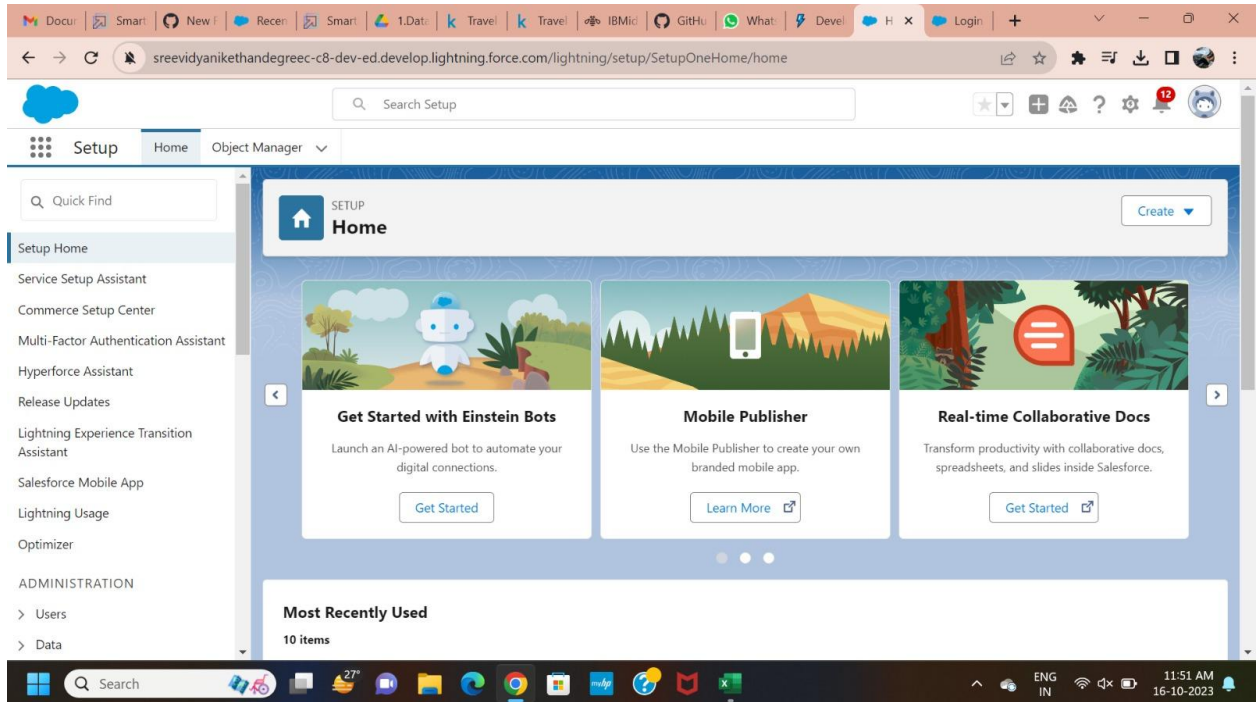
Account Activation

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



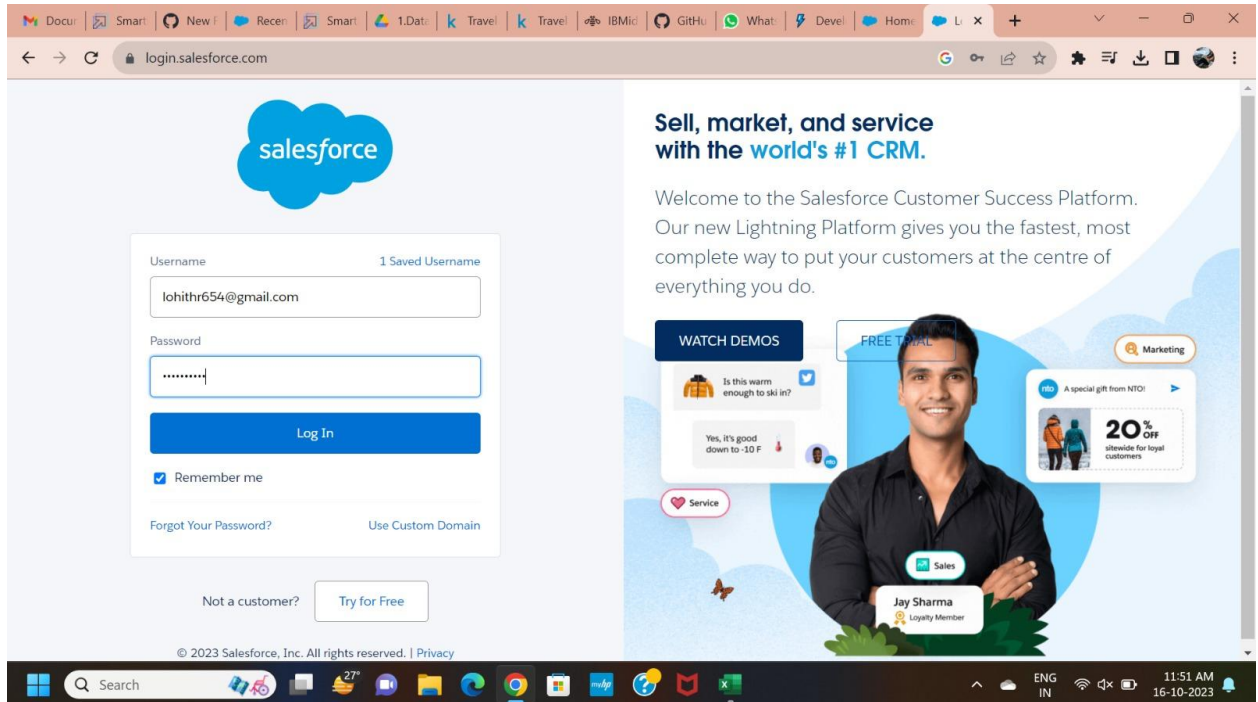
Login To Your Salesforce Account

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.



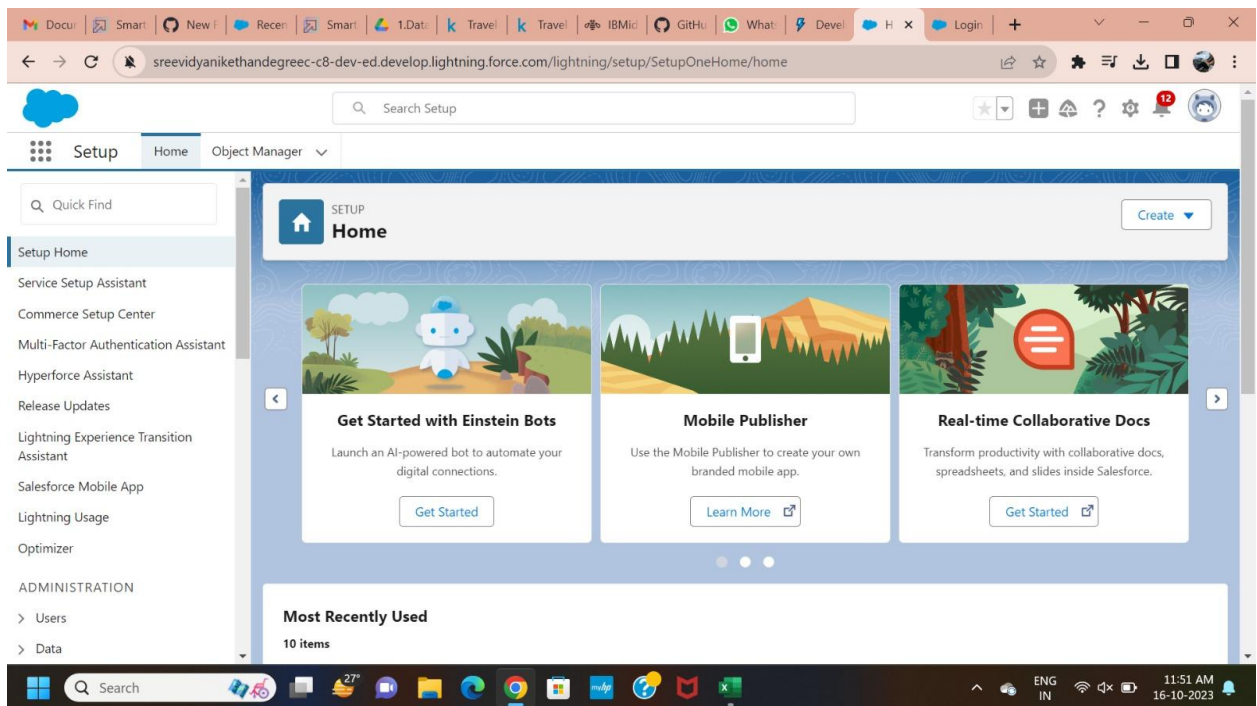
Salesforce Login

<https://login.salesforce.com>



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 such as users, contracts, reports, dashboards, etc.



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.
4. Under Utility Items, leave as is and click Next.
5. From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.
6. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

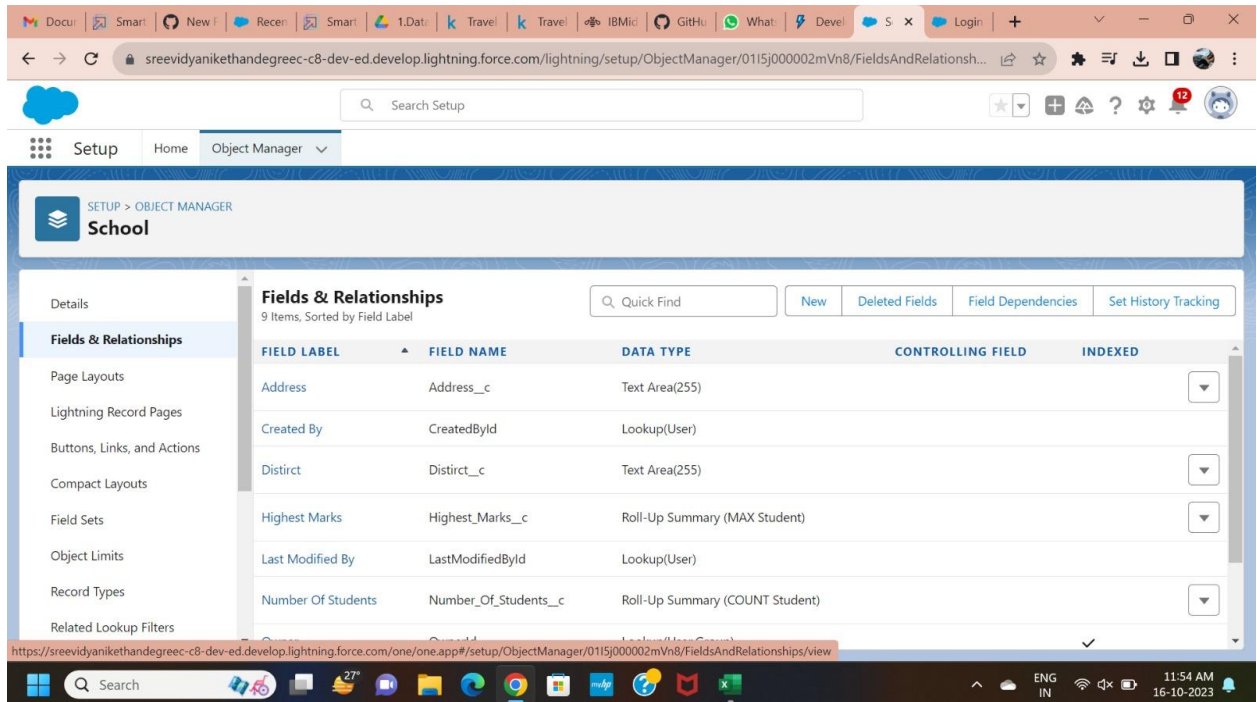
The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Lightning Experience App Manager' and displays a list of 22 items, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The bottom of the screen shows the Windows taskbar with the time 11:53 AM on 16-10-2023.

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		12/10/2023, 11:03 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	12/10/2023, 11:03 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	12/10/2023, 11:03 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designe...	12/10/2023, 11:06 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	12/10/2023, 11:03 am	Classic	✓
6	Content	Content	Salesforce CRM Content	12/10/2023, 11:03 am	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage,...	12/10/2023, 11:03 am	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	12/10/2023, 11:03 am	Lightning	✓
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	12/10/2023, 11:03 am	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	12/10/2023, 11:03 am	Classic	✓

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.

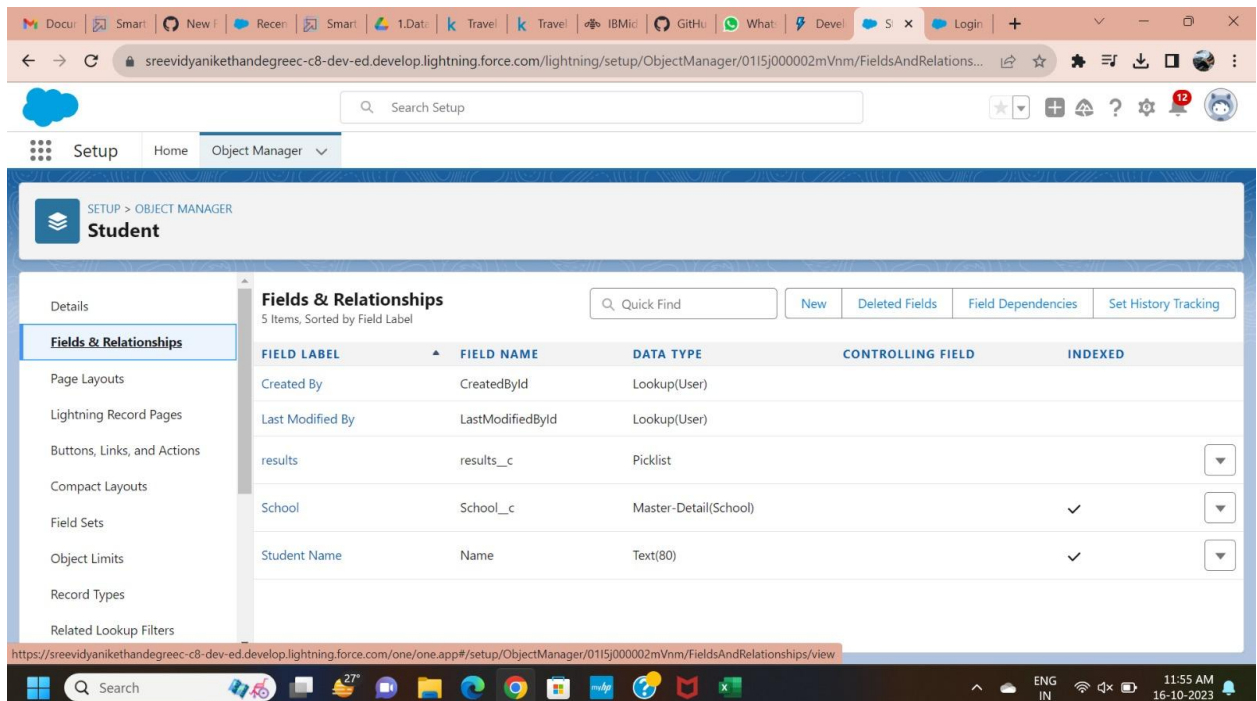
Fields in School Object:



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a table of 9 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Address (Text Area(255)), Created By (Lookup(User)), Distirct (Text Area(255)), Highest Marks (Roll-Up Summary (MAX Student)), Last Modified By (Lookup(User)), and Number Of Students (Roll-Up Summary (COUNT Student)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Distirct	Distirct_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)		


Fields in Student Object:



The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table of 5 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), results (Picklist), School (Master-Detail(School)), and Student Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
results	results_c	Picklist		
School	School_c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Fields in Parent Object:



The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Parent'. On the left, a sidebar lists navigation options: 'Details', 'Fields & Relationships' (selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The 'Fields & Relationships' section displays a table with 6 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows are: Created By (CreatedBy, Lookup(User)), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group), checked), Parent Address (Parent_Address__c, Text Area(255)), Parent Name (Name, Text(80), checked), and Parent Number (Parent_Number__c, Phone). A 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are also visible.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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
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.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Profiles' selected under the 'Users' section. The main content area is titled 'SETUP Profiles' and shows the 'School Profile' configuration page. The page includes a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is the 'Page Layouts' section, which lists 'Standard Object Layouts' and 'Object Milestone Layouts'. The 'Custom Profile' checkbox is checked. The 'Created By' and 'Modified By' fields are populated with the name 'KONETI GARI LOHITH REDDY' and the timestamp '13/10/2023, 6:09 pm' and '13/10/2023, 6:10 pm' respectively. The 'Page Layouts' section shows 'Global' and 'Object Milestone' as available layouts.

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

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	
Created By	KONETI GARI LOHITH REDDY, 13/10/2023, 6:09 pm
Modified By	KONETI GARI LOHITH REDDY, 13/10/2023, 6:10 pm

Custom Profile ☒

Page Layouts

Standard Object Layouts

Global	Global Layout
--------	---------------

Object Milestone

Object Milestone Layout

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 SardarBasha 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 Charan 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 – Principal

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name as Madhusudhanpodipattu 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.

/.

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Permission Set Groups, Profiles, and Users. The main content area is titled 'All Users' and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The user 'LOHITH REDDY KONETI GARI' is selected, and the 'User Integration' profile is chosen. The 'Generate new password' checkbox is checked.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d500000d0s0ueap.pcf0lbi0xiva@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	LOHITH REDDY KONETI GARI	KLOHI	lohihr654@gmail.com		✓	System Administrator
<input checked="" type="checkbox"/> Edit	LOHITH REDDY KONETI GARI	LUCKY	lohihr6543@gmail.com		✓	School Profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00d500000d0s0ueap.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d500000d0s0ueap.com		✓	Analytics Cloud Security User

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 madhusudhanpodipattu,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.

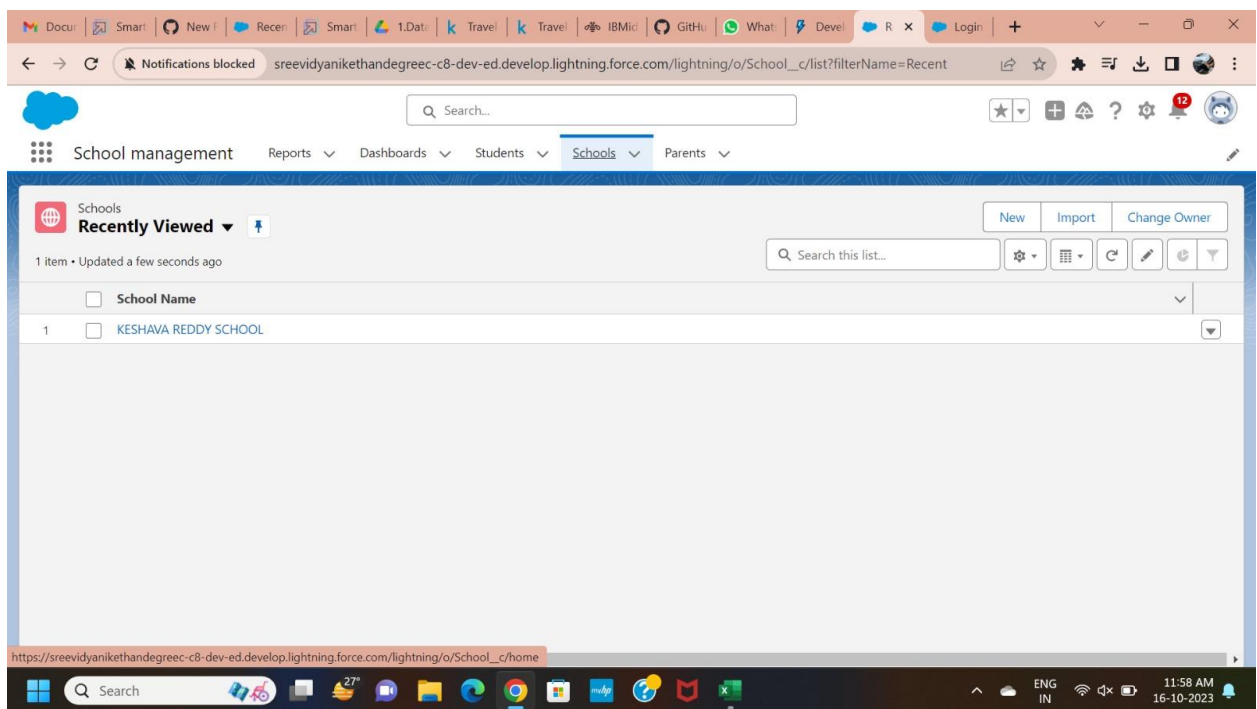
The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Users' and 'Permission Sets' highlighted. The main content area is titled 'Permission Sets' and includes a table of existing permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists various roles like Buyer, Buyer Manager, C360 High Scale Flow Integration User, CRM User, Commerce Admin, Contact Center Admin, and Contact Center Agent. The bottom of the screen shows the Windows taskbar with the date 16-10-2023 and time 11:57 AM.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to ...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	C360 High Scale Flow Integration User	Allows integration user to access features specific to ...	Cloud Integration User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cl...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contac...	Service Cloud Voice User

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.



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.

The screenshot displays the Salesforce Lightning interface for viewing a school record. The browser address bar shows the URL: `sreevidyanikethandegree-c8-dev-ed.develop.lightning.force.com/lightning/r/School__c/a005j00000PpREfAAN/view`. The top navigation bar includes a search bar and tabs for 'School management', 'Reports', 'Dashboards', 'Students', 'Schools', and 'Parents'. The 'Schools' tab is active.

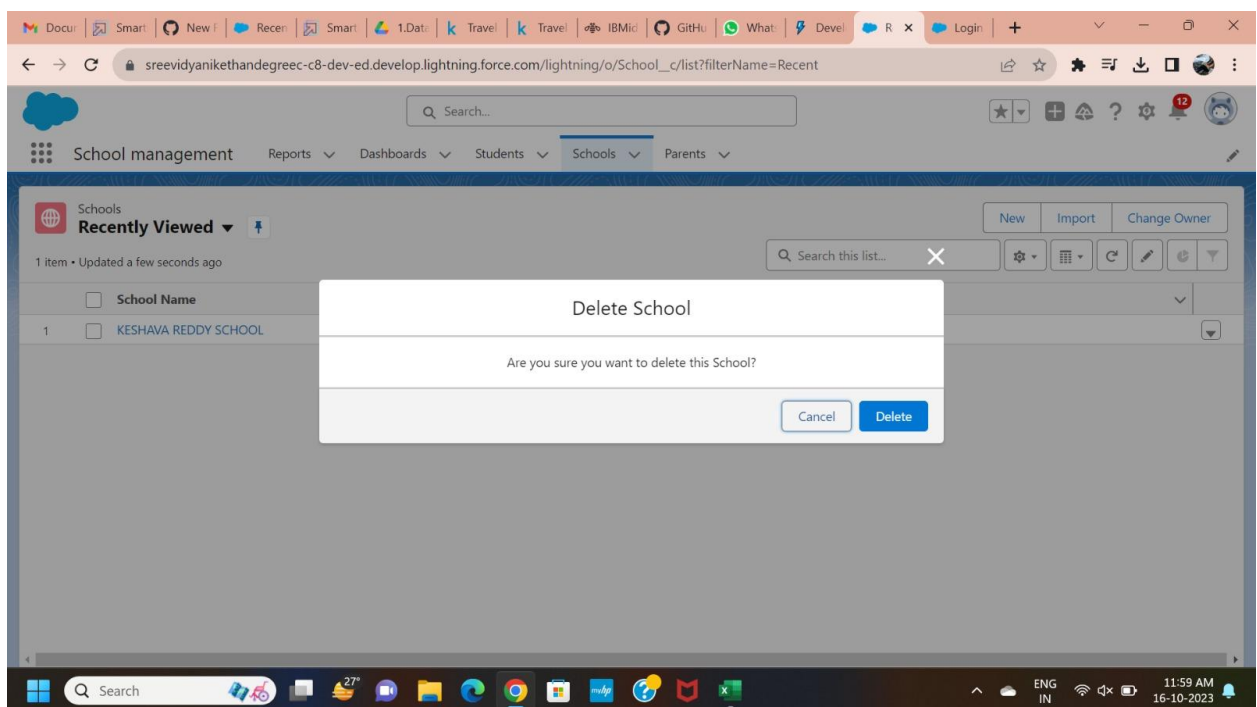
The main content area shows the 'Details' tab for the 'KESHAVA REDDY SCHOOL' record. The record details are as follows:

Field	Value
School Name	KESHAVA REDDY SCHOOL
Address	MR PALLI CIRCLE, TIRUPATHI
Distirct	TIRUPATHI
State	ANDHRA PRADESH
Number Of Students	0
Highest Marks	
Created By	
Last Modified By	

The 'Owner' field is set to 'KONETI GARI LOHITH REDDY'. The interface also includes buttons for 'New Contact', 'Edit', and 'New Opportunity'.

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

The screenshot shows the 'Reports' section of the School Management App. The interface includes a top navigation bar with tabs for 'School management', 'Reports', 'Dashboards', 'Students', 'Schools', and 'Parents'. The 'Reports' tab is active. Below the navigation bar, there is a search bar and buttons for 'New Report' and 'New Folder'. The main content area displays a table of recent reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A single report is listed: 'New Schools with Students Report' in the 'Private Reports' folder, created by 'KONETI GARI LOHITH REDDY' on '13/10/2023, 7:35 pm'. The left sidebar shows a list of report categories: 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES'.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Schools with Students Report		Private Reports	KONETI GARI LOHITH REDDY	13/10/2023, 7:35 pm	

View Report

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Reports Tab.
4. Click on School with Students report and see records.

THE END