

PROJECT REPORT ON

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

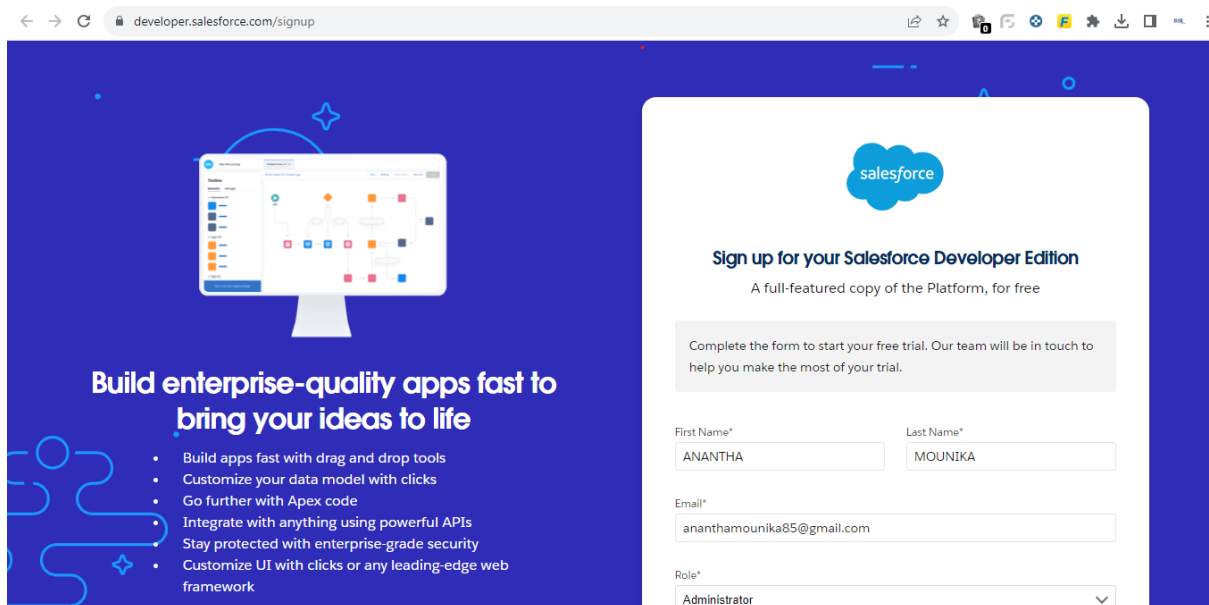
Introduction:

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 - Anantha Mounika
- Email - ananthamounika85@gmail.com
- Role - SALESFORCE ADMIN
- Company - Sree Vidhyanikethan-Rangampeta
- Country - India
- Postal Code - pin code 517501
- Username - ananthamounika851@gmail.com



developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- 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 framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
ANANTHA

Last Name*
MOUNIKA

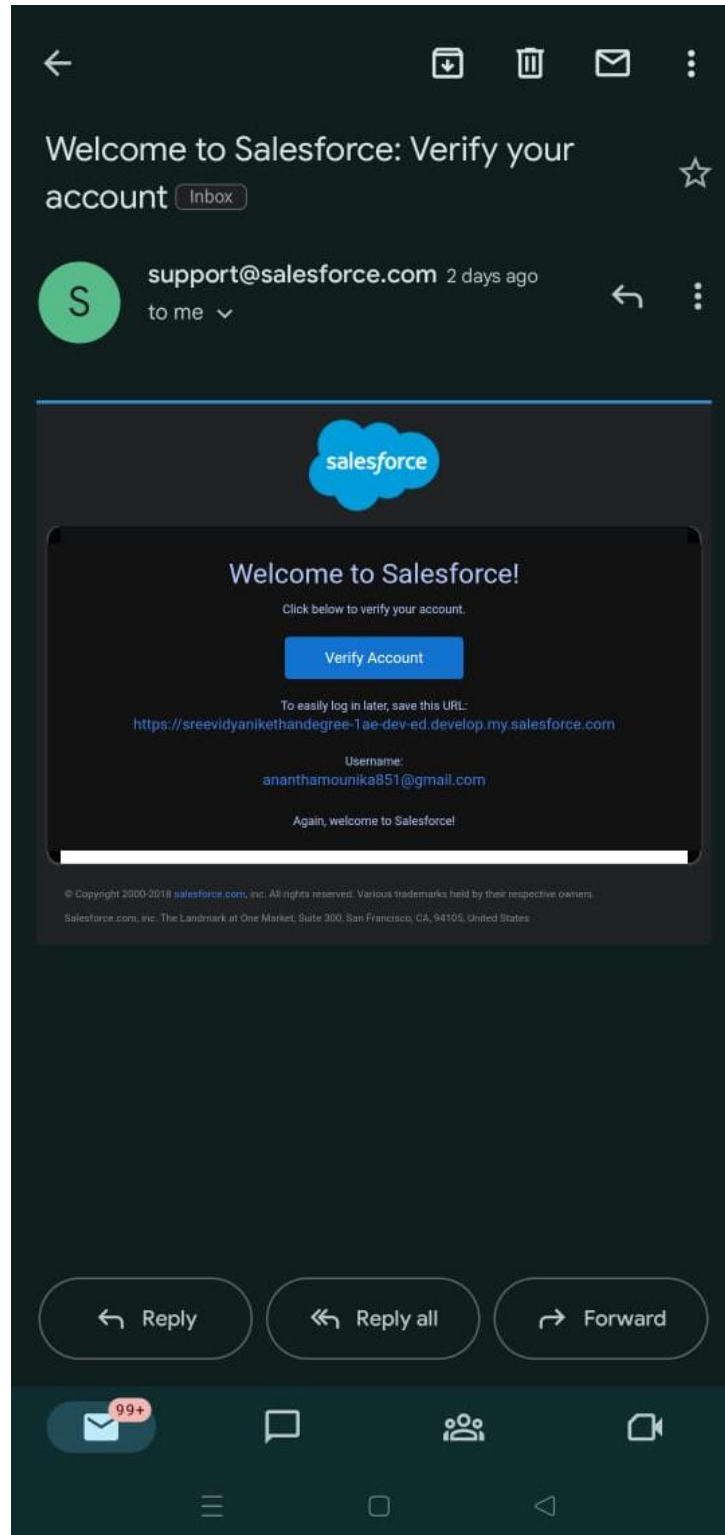
Email*
ananthamounika85@gmail.com

Role*
Administrator

Account Activation

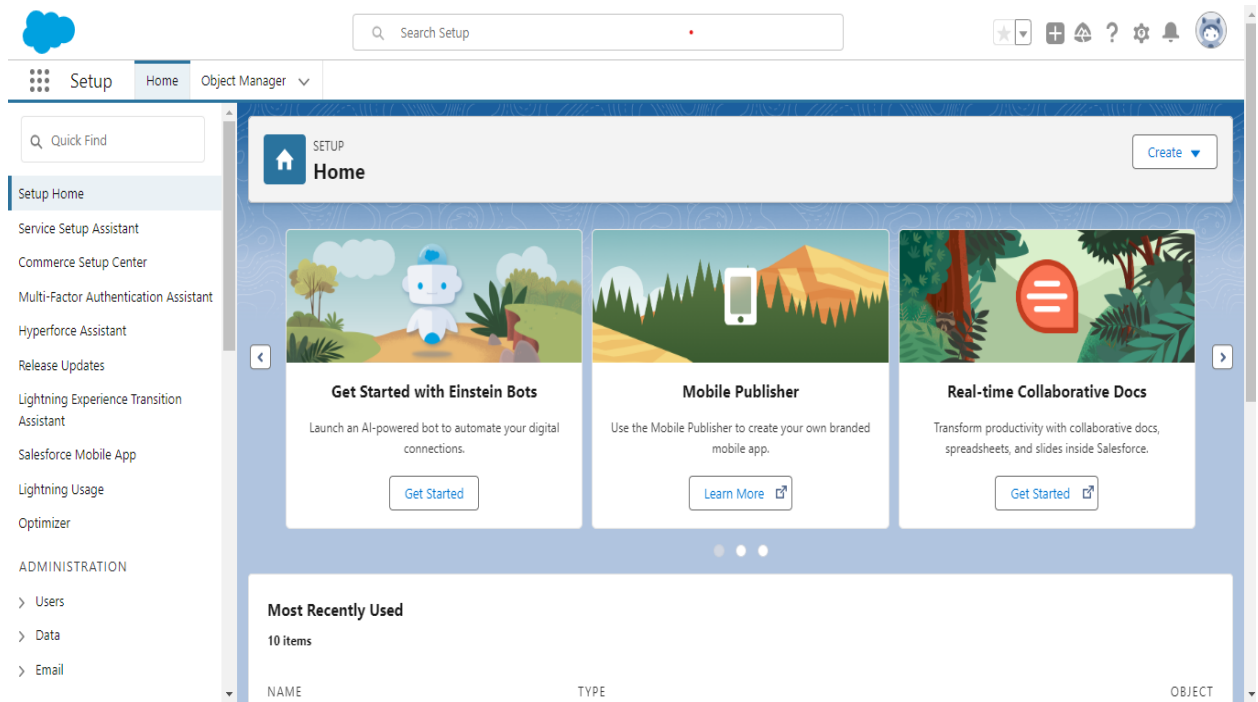
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as

/



Login To Your Salesforce Account

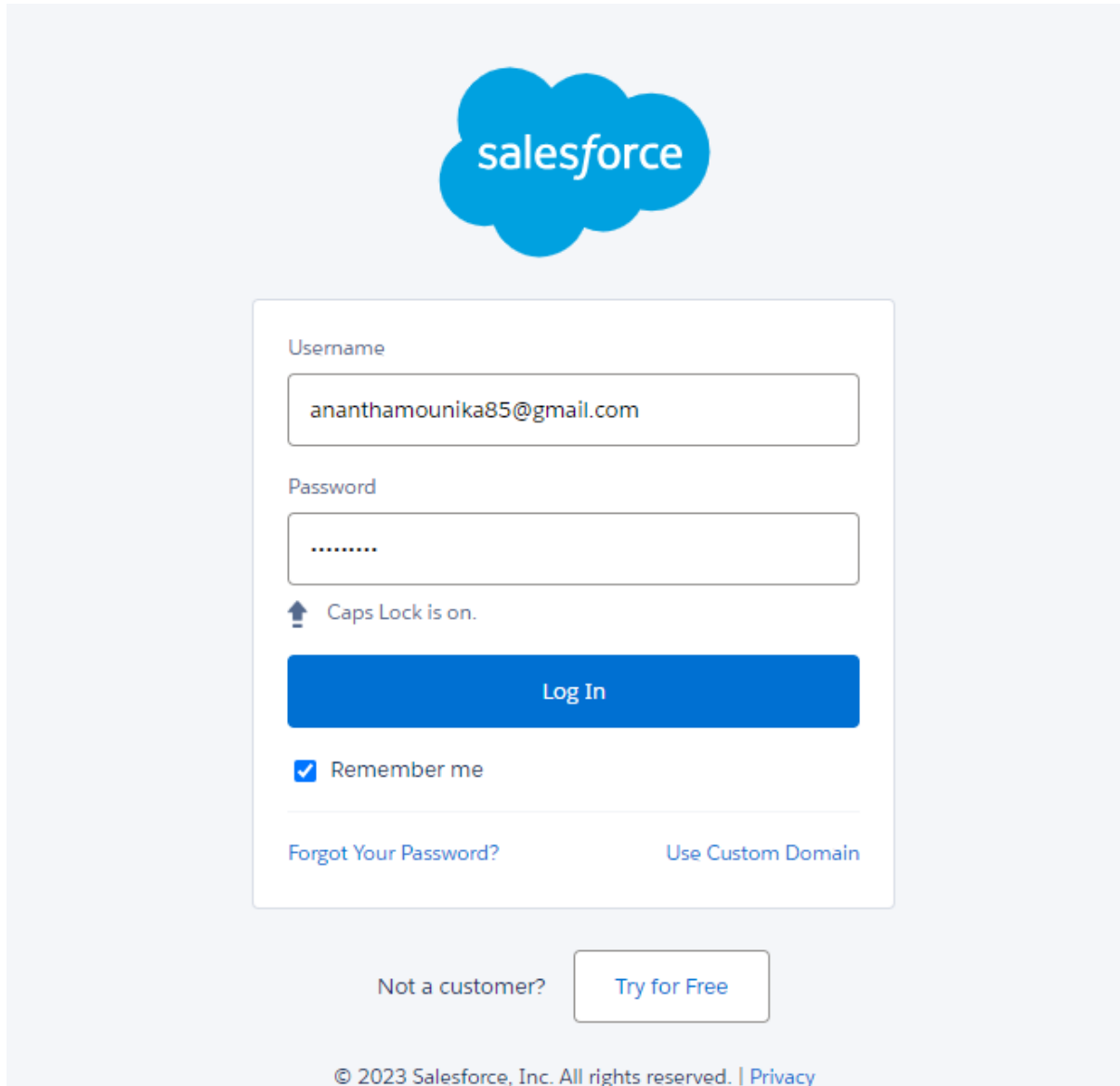
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



/

Salesforce Login

<https://login.salesforce.com>



The image shows the Salesforce login page. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white rectangular login form with rounded corners. Inside the form, there are two input fields: "Username" and "Password". The "Username" field contains the email address "ananthamounika85@gmail.com". The "Password" field is filled with dots. Below the password field, there is a small upward-pointing arrow icon followed by the text "Caps Lock is on.". A large blue "Log In" button is positioned below the password field. Underneath the button is a checkbox labeled "Remember me", which is currently checked. At the bottom of the form, there are two links: "Forgot Your Password?" on the left and "Use Custom Domain" on the right. Below the login form, there is a link "Not a customer?" followed by a button labeled "Try for Free". At the very bottom of the page, there is a copyright notice: "© 2023 Salesforce, Inc. All rights reserved. | Privacy".

salesforce

Username

ananthamounika85@gmail.com

Password

.....

↑ Caps Lock is on.

Log In

☒ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

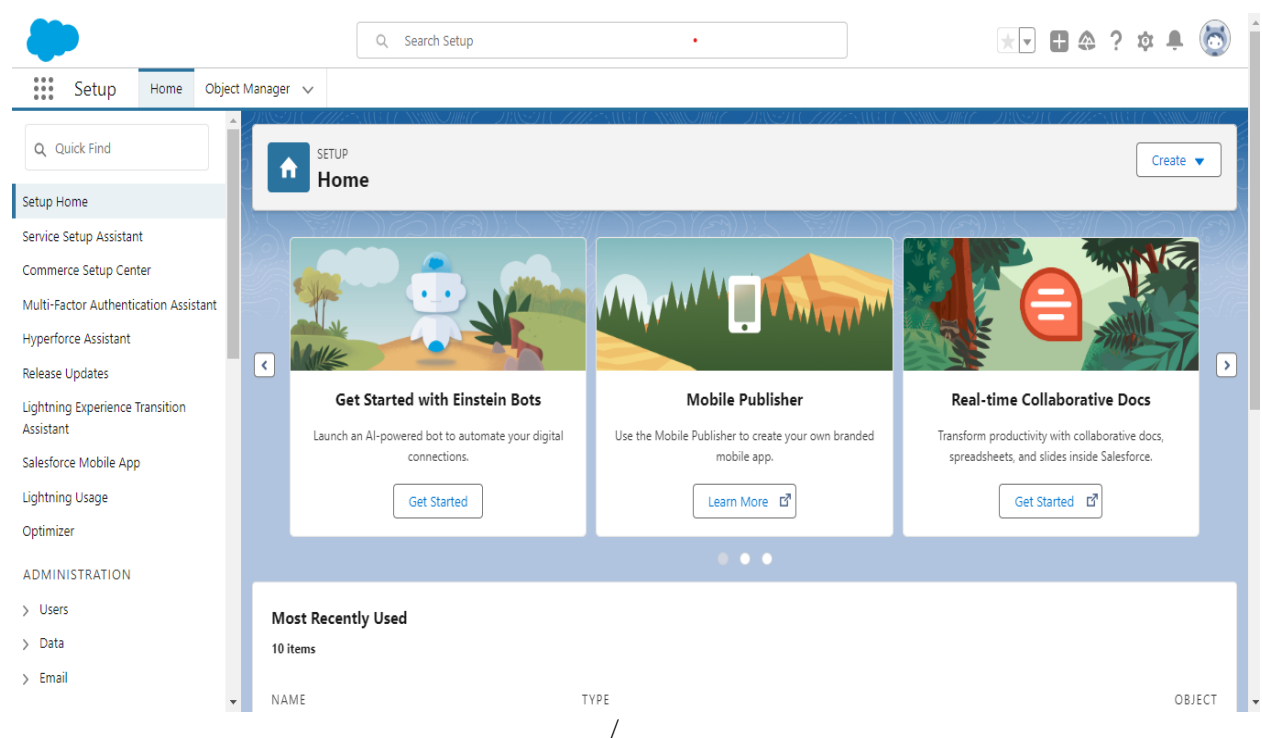
Not a customer? [Try for Free](#)

© 2023 Salesforce, Inc. All rights reserved. | [Privacy](#)

/

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.

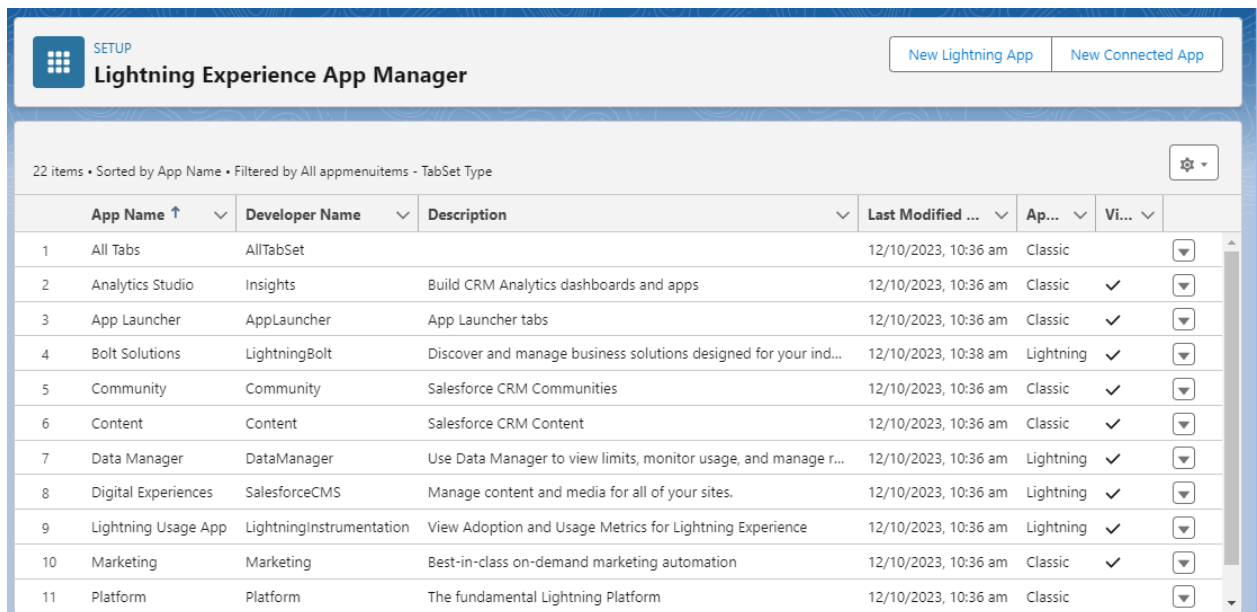


Milestone 03 - Lightning App

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.



	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
1	All Tabs	AllTabSet		12/10/2023, 10:36 am	Classic		⌵
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	12/10/2023, 10:36 am	Classic	✓	⌵
3	App Launcher	AppLauncher	App Launcher tabs	12/10/2023, 10:36 am	Classic	✓	⌵
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ind...	12/10/2023, 10:38 am	Lightning	✓	⌵
5	Community	Community	Salesforce CRM Communities	12/10/2023, 10:36 am	Classic	✓	⌵
6	Content	Content	Salesforce CRM Content	12/10/2023, 10:36 am	Classic	✓	⌵
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage r...	12/10/2023, 10:36 am	Lightning	✓	⌵
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	12/10/2023, 10:36 am	Lightning	✓	⌵
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	12/10/2023, 10:36 am	Lightning	✓	⌵
10	Marketing	Marketing	Best-in-class on-demand marketing automation	12/10/2023, 10:36 am	Classic	✓	⌵
11	Platform	Platform	The fundamental Lightning Platform	12/10/2023, 10:36 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 left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 11 items, sorted by Field Label. The table below lists the fields:

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)		✓
Phone Number	Phone_Number__c	Phone		

Fields in Student Object:

The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 5 items, sorted by Field Label. The table below lists the fields:

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 Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Parent' object is selected. The left sidebar lists various setup options, with 'Fields & Relationships' highlighted. The main content area displays a table of fields for the 'Parent' object, sorted by field label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. Fields listed include 'Created By', 'Last Modified By', 'Owner', 'Parent Address', 'Parent Name', and 'Parent Number'. The 'Parent Address', 'Parent Name', and 'Parent Number' fields have dropdown arrows in the Indexed column.

Setup > OBJECT MANAGER
Parent

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

Fields & Relationships
6 Items, Sorted by Field Label

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
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 shows the Salesforce Setup interface for the 'School Profile'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The sidebar on the left shows 'Users' and 'Profiles' sections. The main content area is titled 'School Profile' and includes a 'Help for this Page' link. Below the title, there is a description of the profile and a list of enabled permissions. The 'Profile Detail' section shows the profile name 'School Profile', user license 'Salesforce', and a 'Custom Profile' checkbox checked. The 'Page Layouts' section shows a table of standard object layouts and their assigned page layouts.

Profile Detail	
Name	School Profile
User License	Salesforce
Description	
Created By	ANANTHA MOUNIKA 13/10/2023, 6:09 pm
Modified By	ANANTHA MOUNIKA 13/10/2023, 6:10 pm

Page Layouts	
Standard Object Layouts	
Global	Global Layout (View Assignment)
Email Application	Not Assigned (View Assignment)
Home Page Layout	DE Default (View Assignment)
Account	Account Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)
Object Milestone	Object Milestone Layout (View Assignment)
Operating Hours	Operating Hours Layout (View Assignment)
Opportunity	Opportunity Layout (View Assignment)
Opportunity Product	Opportunity Product Layout (View Assignment)
Order	Order Layout (View Assignment)

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. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar, a 'View: All Users' dropdown, and a 'Create New User' button. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains five rows of user data. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter00d500000dnhweag.hvzqamvvhunw@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	MOUNIKA ANANTHA	AMOUN	ananthamounika85@gmail.com		✓	System Administrator
<input checked="" type="checkbox"/> Edit	MOUNIKA ANANTHA	MOUNI	ananthamounika851@gmail.com		✓	School Profile
<input type="checkbox"/> Edit	User Integration	intse	integration@00d500000dnhweag.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d500000dnhweag.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 onNeeraja mam, Next, Assign.

SETUP **Permission Sets**

Permission Sets

On this page you can create, view, and manage permission sets.

[All Permission Sets](#) [Edit](#) [Delete](#) [Create New View](#)

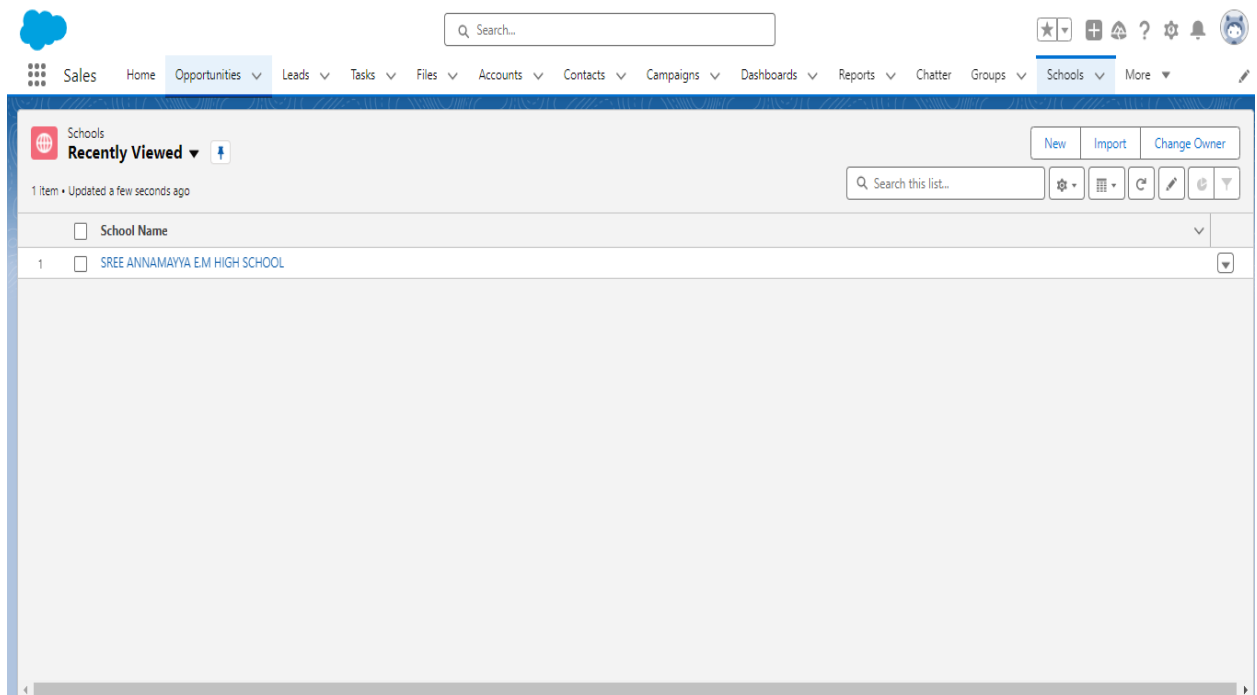
Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Sca...	Cloud Integration User
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers t...	Service Cloud Voice User
Del Clone	Experience Profile Manager		Salesforce
Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seats
Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Intelligent Order Management User

1-25 of 32 0 Selected Page 1 of 2

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.

/

 School

SREE ANNAMAYYA E.M HIGH SCHOOL

Related

Details

School Name

SREE ANNAMAYYA E.M HIGH SCHOOL

Address

NEHRU NAGAR ,TIRUPATI

District

TIRUPATI

State

ANDHRA PRADESH


School Name

SREE ANNAMAYYA EM SC

Phone Number

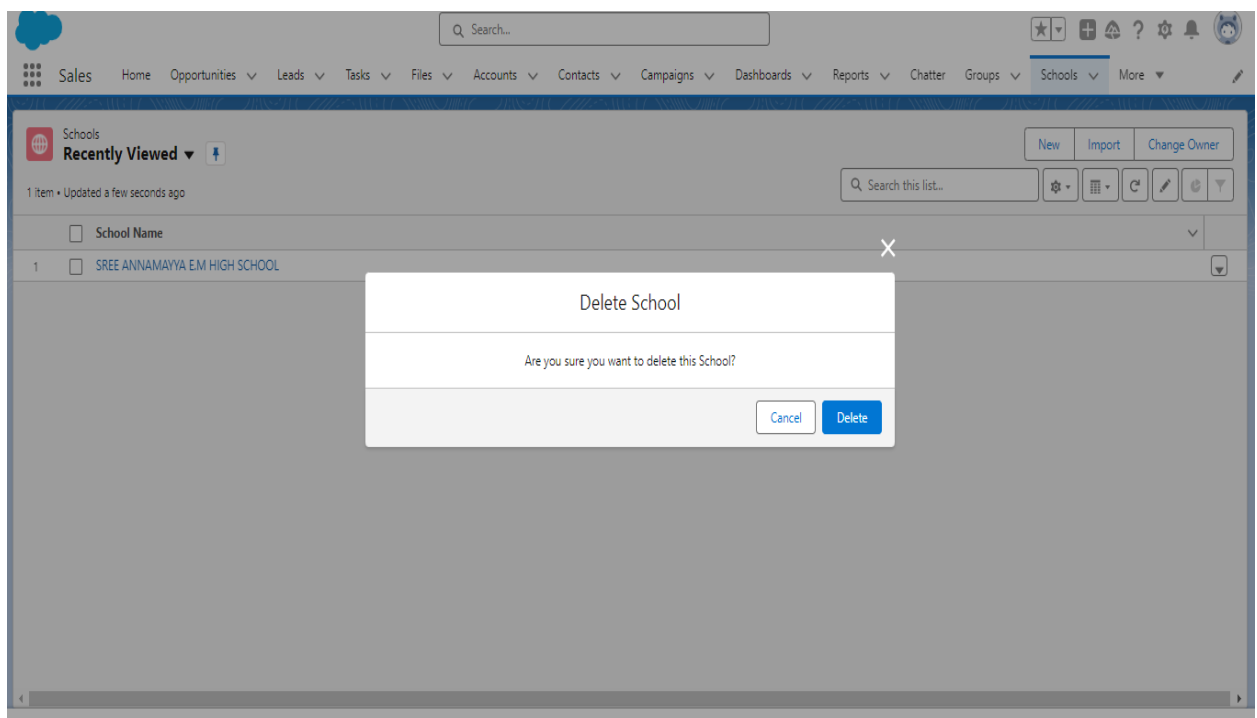
8978764008

Owner

 [ANANTHA MOUNIKA](#)

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.



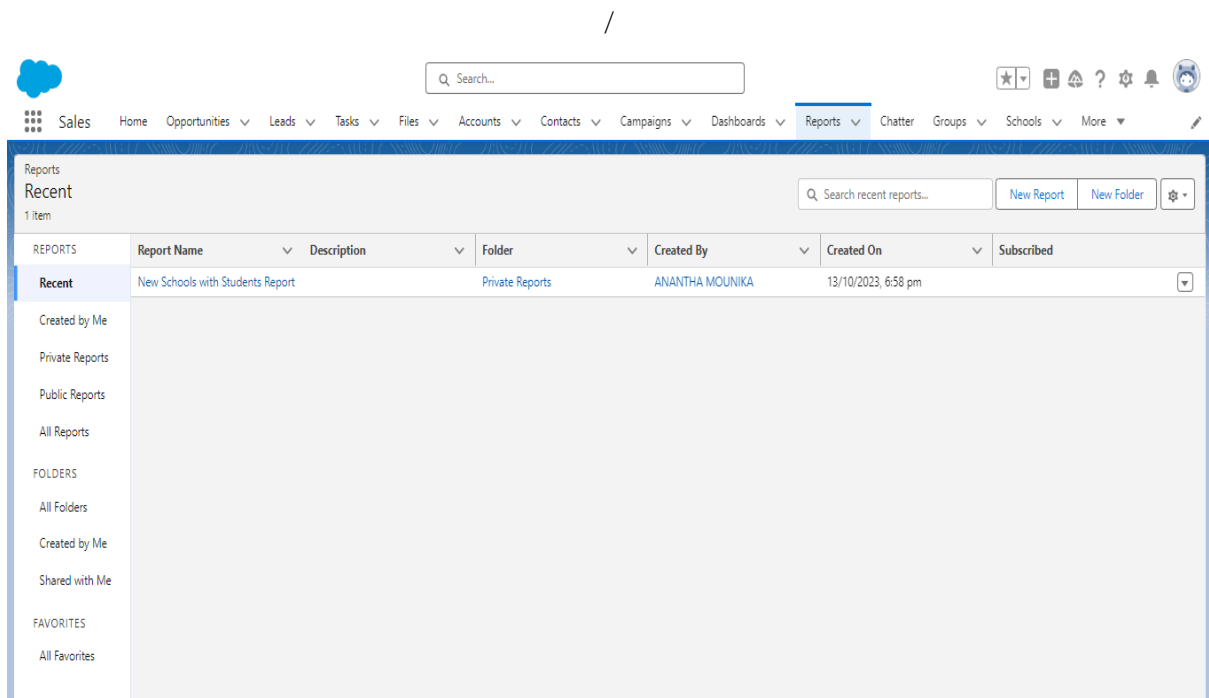
/

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

/



Reports

Recent

1 item

Q Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Schools with Students Report		Private Reports	ANANTHA MOUNIKA	13/10/2023, 6:58 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

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