

PROJECT REPORT ON

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

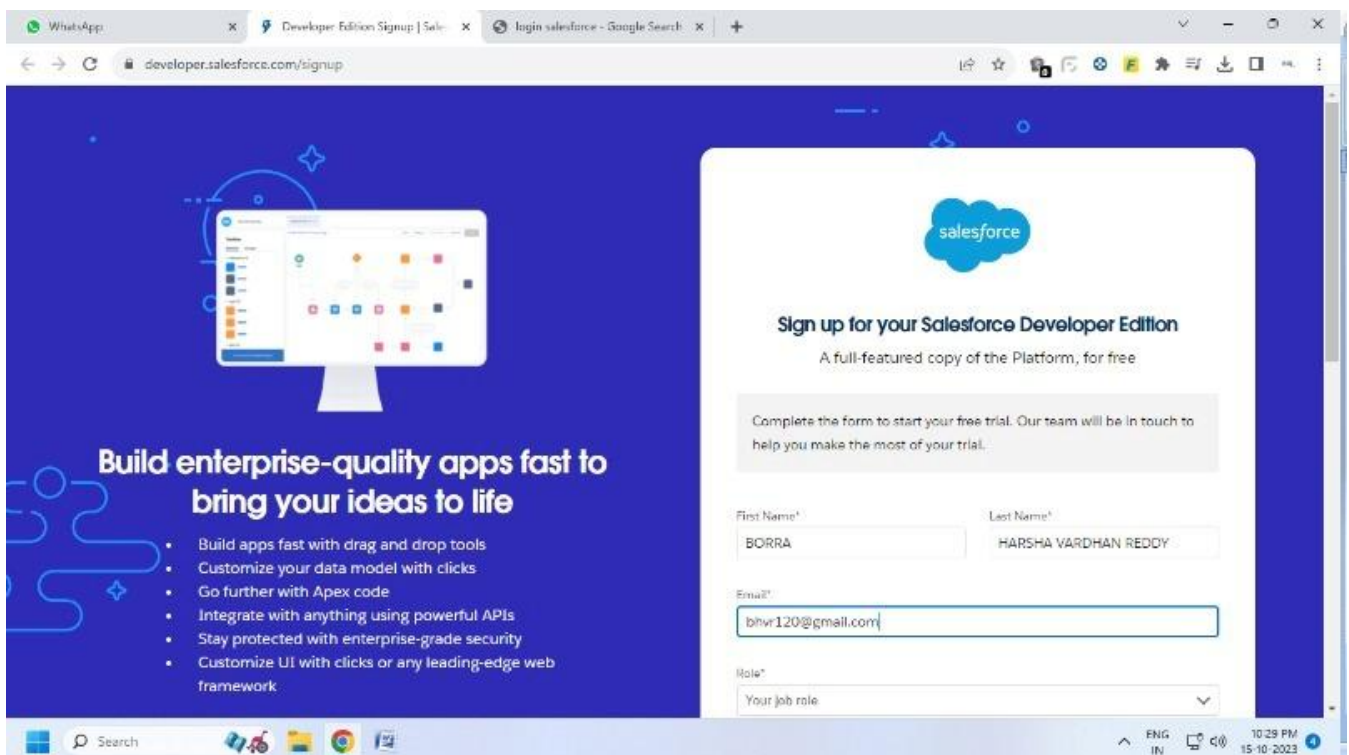
Introduction:

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

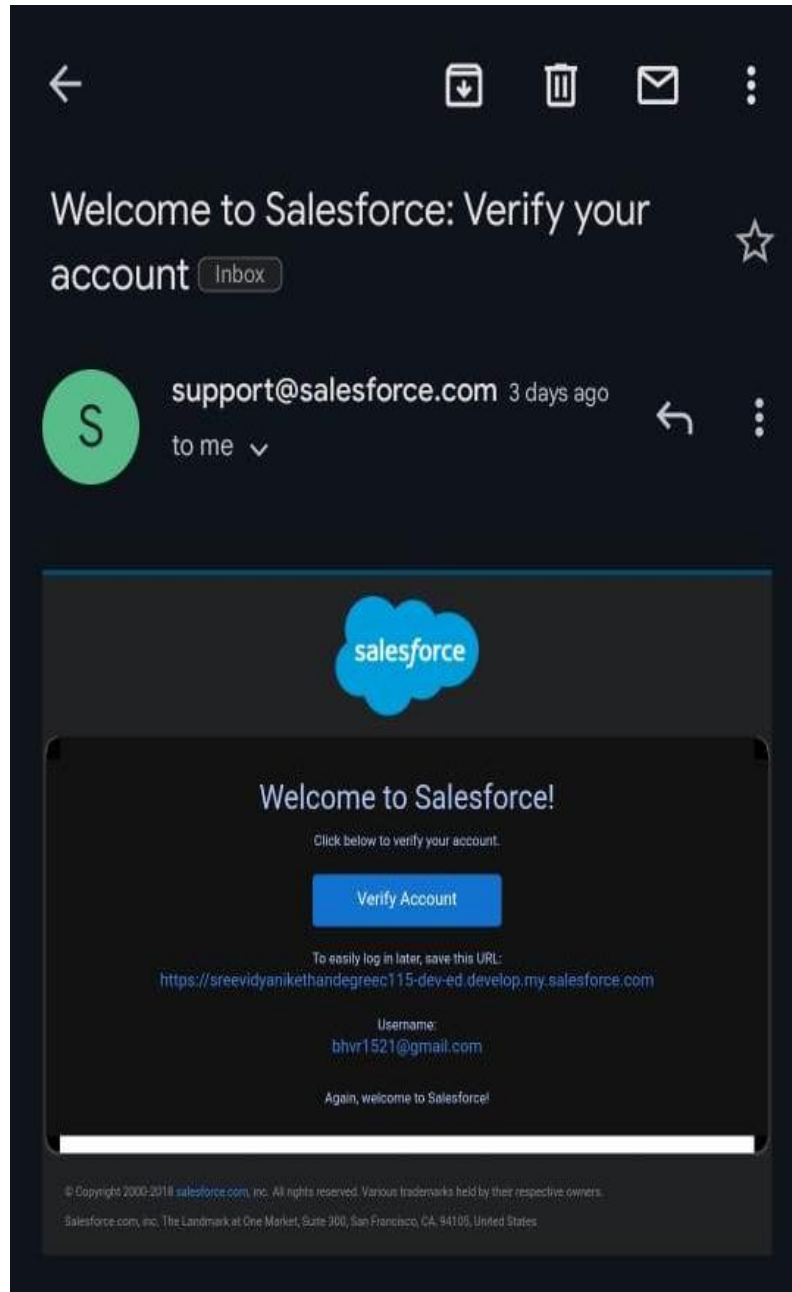
Go to developer.salesforce.com Click on sign up.

- On the sign up form, enter the following details
- First name & Last name - Borra Harsha Vardhan Reddy
- Email - bhvr120@gmail.com
- Role - SALESFORCE ADMIN
- Company - Sree Vidhyanikethan-Rangampeta
- Country - India
- Postal Code - pin code 517501
- Username - bhvr1521@gmail.com



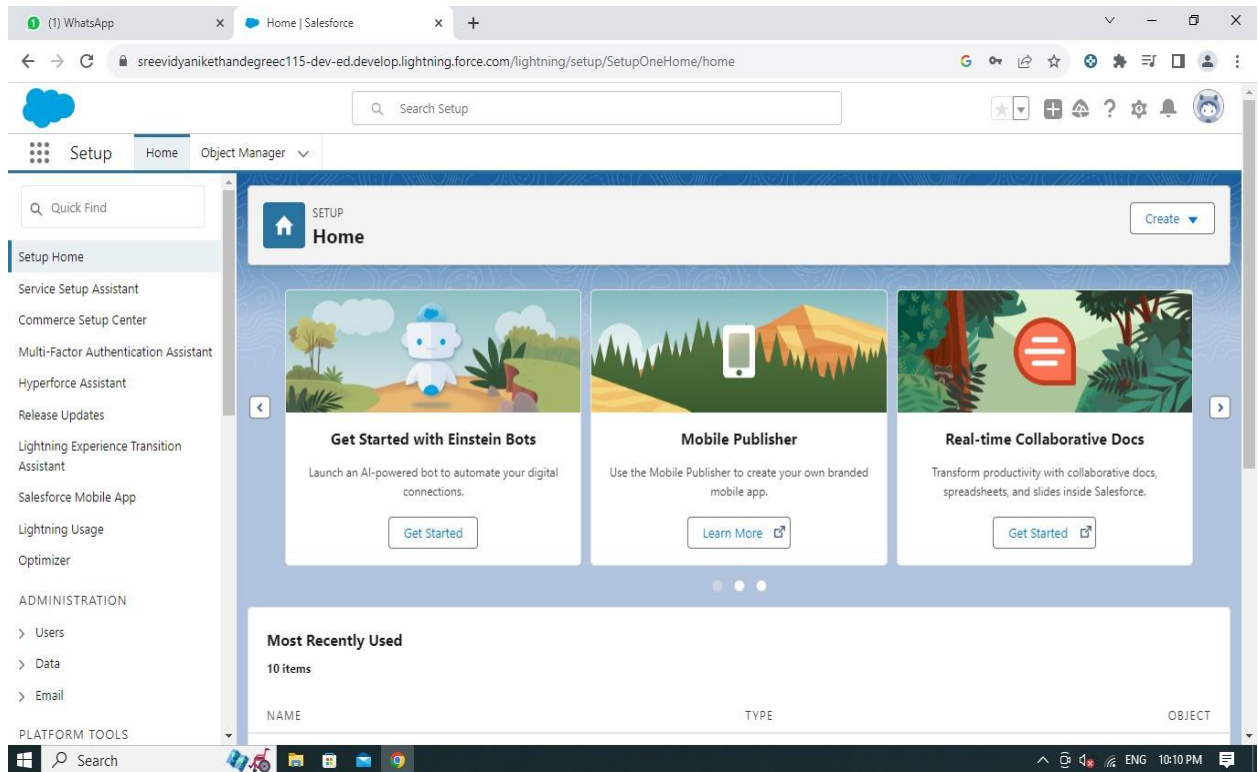
Account Activation

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



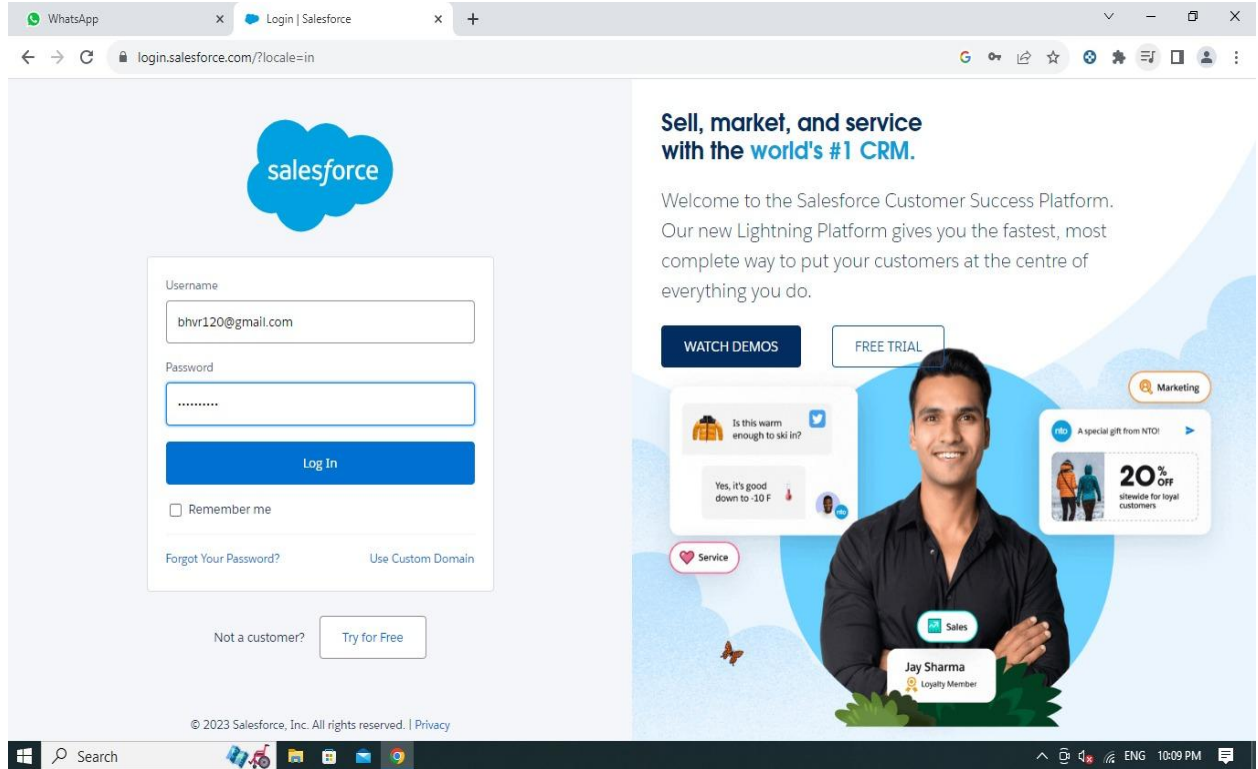
Login To Your Salesforce Account

1. Go to salesforce.com 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.



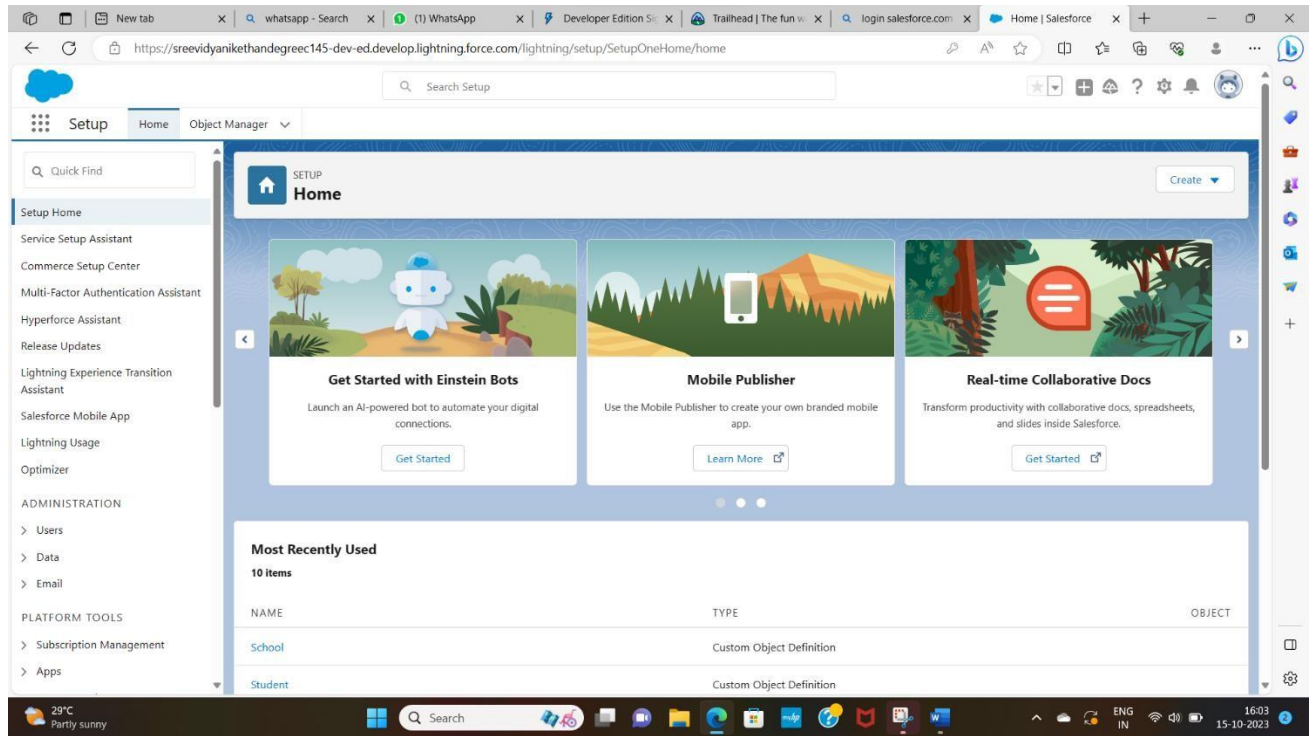
Salesforce Login

<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.

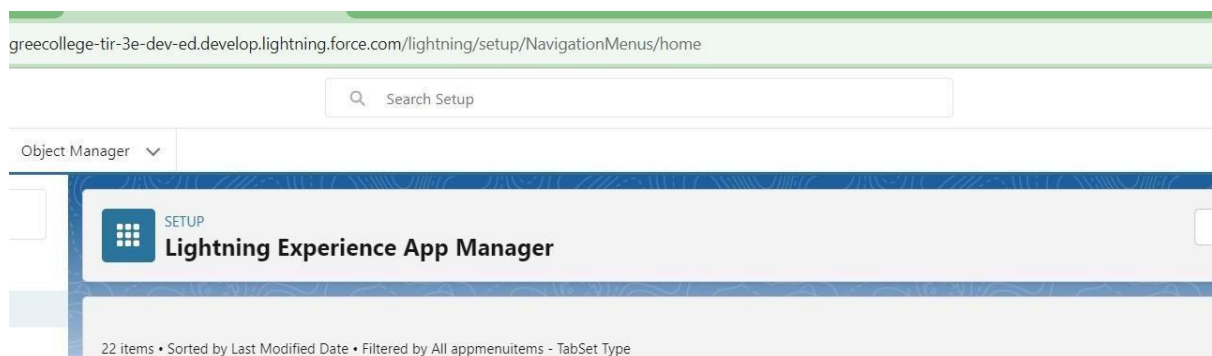


Milestone 03 - Lightning App

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

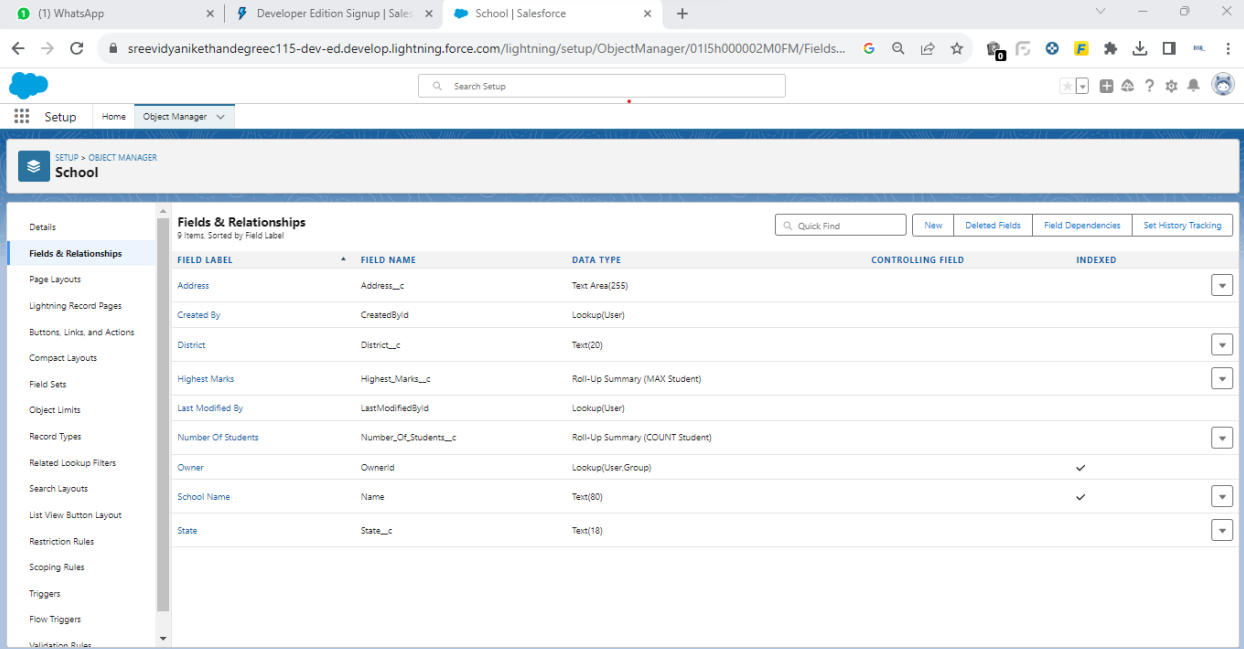
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter School Management as the App Name, then click Next 4. Under App Options, leave the default selections and click Next.
4. Under Utility Items, leave as is and click Next.
5. From Available Items, 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.



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.

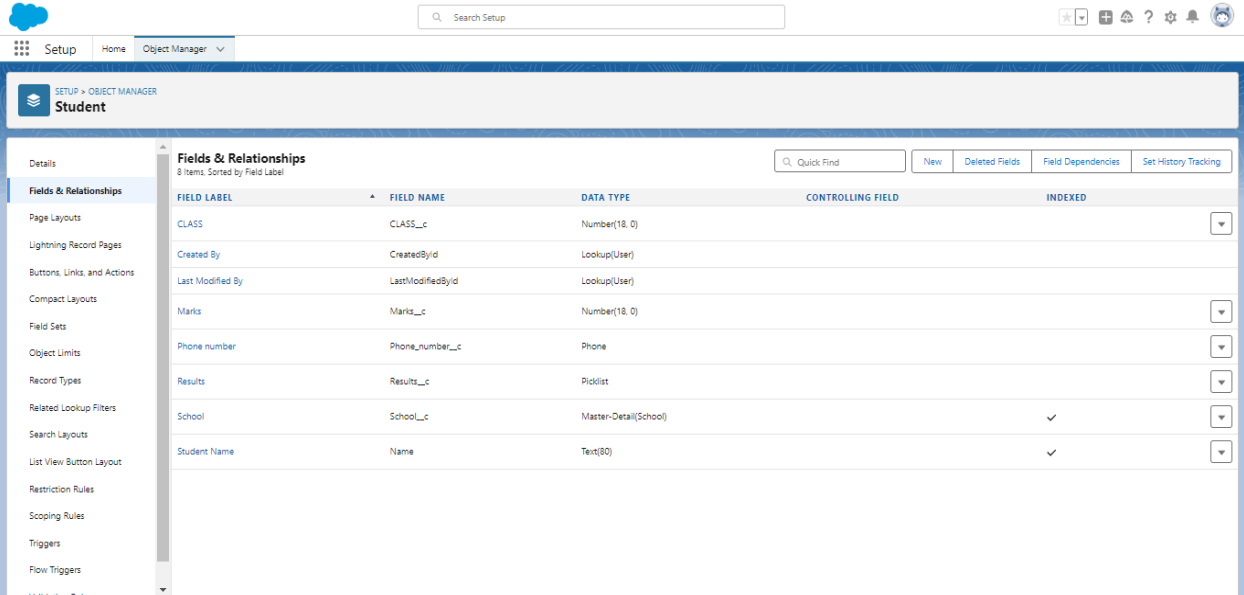
Fields in School Object:



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|--------------------|-----------------------|---------------------------------|-------------------|---------|
| Address | Address__c | Text Area(255) | | |
| Created By | CreatedById | Lookup(User) | | |
| District | District__c | Text(20) | | |
| 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) | | ✓ |
| School Name | Name | Text(80) | | ✓ |
| State | State__c | Text(18) | | |

Fields in Student Object:



The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|-----------------------|-------------------|---------|
| CLASS | CLASS__c | Number(18, 0) | | |
| Created By | CreatedById | Lookup(User) | | |
| 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

Search Setup

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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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.

Setup Home Object Manager

Search Setup

prof

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

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 Open Class Access](#) | [Enabled Viewpoints Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Territory Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail Edit Clone Delete View Users

| | | | |
|--------------|----------------------------|----------------|----------------------------|
| Name | School profile | Custom Profile | ✓ |
| User License | Salesforce | | |
| Description | | | |
| Created By | BORRA HARSHA VAROHAN REDDY | Modified By | BORRA HARSHA VAROHAN REDDY |
| | 12/10/2023, 7:51 pm | | 12/10/2023, 8:08 pm |

Page Layouts

| Standard Object Layouts | Object Milestone |
|---|---|
| Global: Global Layout (View Assignment) | Object Milestone Layout (View Assignment) |
| Email Application: Not Assigned (View Assignment) | Operating Hours: Operating Hours Layout (View Assignment) |
| Home Page Layout: DE Default (View Assignment) | Opportunity: Opportunity Layout (View Assignment) |
| Account: Account Layout (View Assignment) | Opportunity Product: Opportunity Product Layout (View Assignment) |
| Alternative Payment Method: Alternative Payment Method Layout (View Assignment) | Order: Order Layout (View Assignment) |
| Appointment Invitation: Appointment Invitation Layout (View Assignment) | Order Product: Order Product Layout (View Assignment) |
| Asset: Asset Layout (View Assignment) | Payment: Payment Layout (View Assignment) |
| Asset Action: Asset Action Layout (View Assignment) | Payment Authorization: Payment Authorization Layout (View Assignment) |
| Asset Action Source: Asset Action Source Layout (View Assignment) | Payment Authorization Adjustment: Payment Authorization Adjustment 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 is a navigation menu with categories like Users, Feature Settings, Data.com, Service, Embedded Service, and User Interface. The 'Users' section is expanded, showing options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and contains a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Five users are listed, including system users like Chatter Export, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User. The user 'HARSHA VARSHAN REDDY BORRA' is highlighted with a blue selection bar.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|--|----------------------------|---------|--|------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Export | Chatter | chatter00000000000000000000000000000000@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | HARSHA VARSHAN REDDY BORRA | BHARS | bhvr120@gmail.com | | ✓ | System Administrator |
| <input checked="" type="checkbox"/> Edit | HARSHA VARSHAN REDDY BORRA | bhvr | bhvr1521@gmail.com | | ✓ | School profile |
| <input type="checkbox"/> Edit | User Integration | intgr | integration@00000000000000000000000000000000@salesforce.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | intgrtsecurity@00000000000000000000000000000000@salesforce.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.

SETUP
Permission Sets

Permission Sets

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

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

[New](#) [⌵](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

| Action | Permission Set Label | Description | License |
|---|---|---|--|
| Clone | Buyer | Allows access to the store. Lets users see products and categories, make purchases, a... | B2B Buyer Permission Set One Seat |
| Clone | Buyer Manager | Includes all Buyer capabilities, and allows access to manage carts and orders related to... | B2B Buyer Manager Permission Set One Seat |
| Clone | C380 High Scale Flow Integration User | Allows integration user to access features specific to C380 High Scale Flow. | 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 Seat |
| Clone | Contact Center Admin | Manage Service Cloud Voice contact centers that use Amazon Connect as a telephony ... | Service Cloud Voice User |
| Clone | Contact Center Agent | Access agent features in Service Cloud Voice contact centers that use Amazon Conn... | Service Cloud Voice User |
| Clone | Contact Center Supervisor | Access supervisor features in Service Cloud Voice contact centers that use Amazon ... | Service Cloud Voice User |
| Del Clone | Experience Profile Manager | | Salesforce |
| Clone | Facility Manager | Lets users create, read, edit, and delete locations, sublocations, queued parties, and ... | Facility Manager |
| Clone | FieldServiceMobileStandardPermSet | Give your mobile workforce access to the Field Service mobile app. Set them up with ... | Field Service Mobile |
| Clone | Merchandiser | Allow access to commerce merchandising features. | Commerce Merchandiser User Permission Set License Seat |
| Clone | Order Management Agent | Read Access to all entities enabled by Order Management | Lightning Order Management User |
| Clone | Order Management Operations Manager | Access to all features enabled by Order Management | Lightning Order Management User |
| Clone | Order Management Shopper | Limited access to Order Management features for Self Service | Lightning Order Management User |
| Clone | Order Management Store Associate | Access to limited features enabled by Order Management | Lightning Order Management User |
| Clone | Queue Manager | Lets users create, read, edit, and delete queued parties as well as read and update que... | Queue Manager |
| Clone | SCRT2 Integration User | Give SCRT2 Integration User necessary access | Cloud Integration User |

1-25 of 31 | 0 Selected

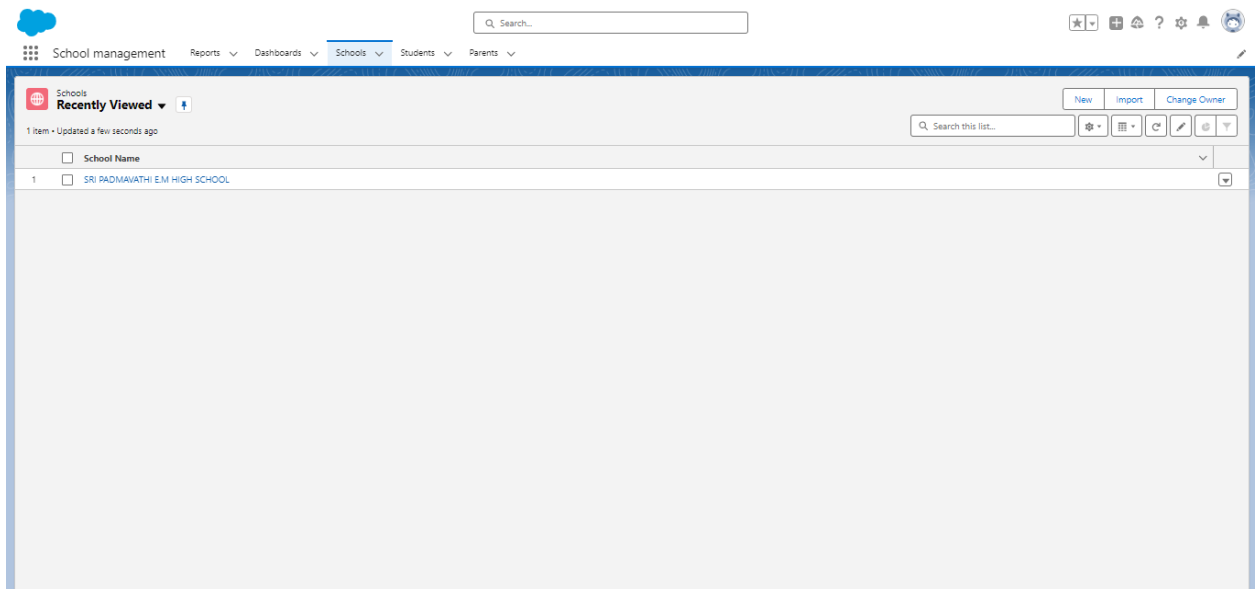
« Previous Next »

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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.



Search...

School managementReportsDashboardsSchoolsStudentsParents

School

SRI PADMAVATHI E.M HIGH SCHOOL

Related

Details

School Name

SRI PADMAVATHI E.M HIGH SCHOOL

Address

M K NAIDU COLONY 2ND CROSS,BAIRAGIPATTEDA,TIRUPATI

District

TIRUPATI

State


ANDHRA PRADESH

Number Of Students

0

Highest Marks

Owner

 [BORRA HARSHA VARDHAN REDDY](#)

Created By

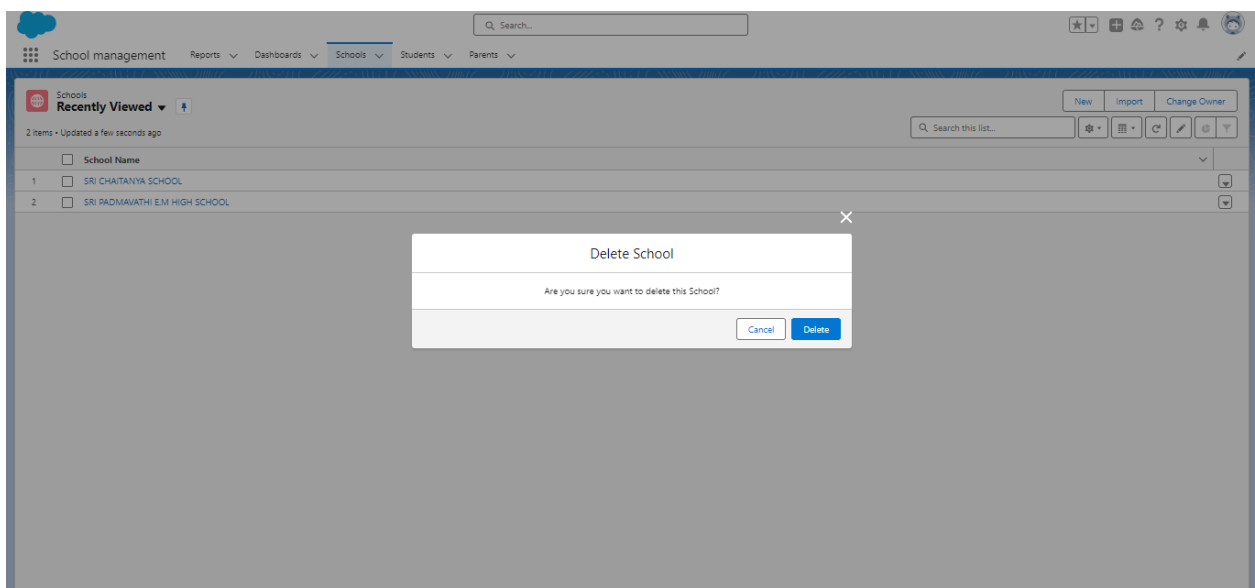
 [BORRA HARSHA VARDHAN REDDY](#), 13/10/2023, 4:48 pm

Last Modified By

 [BORRA HARSHA VARDHAN REDDY](#), 13/10/2023, 4:48 pm

Delete Record (School)

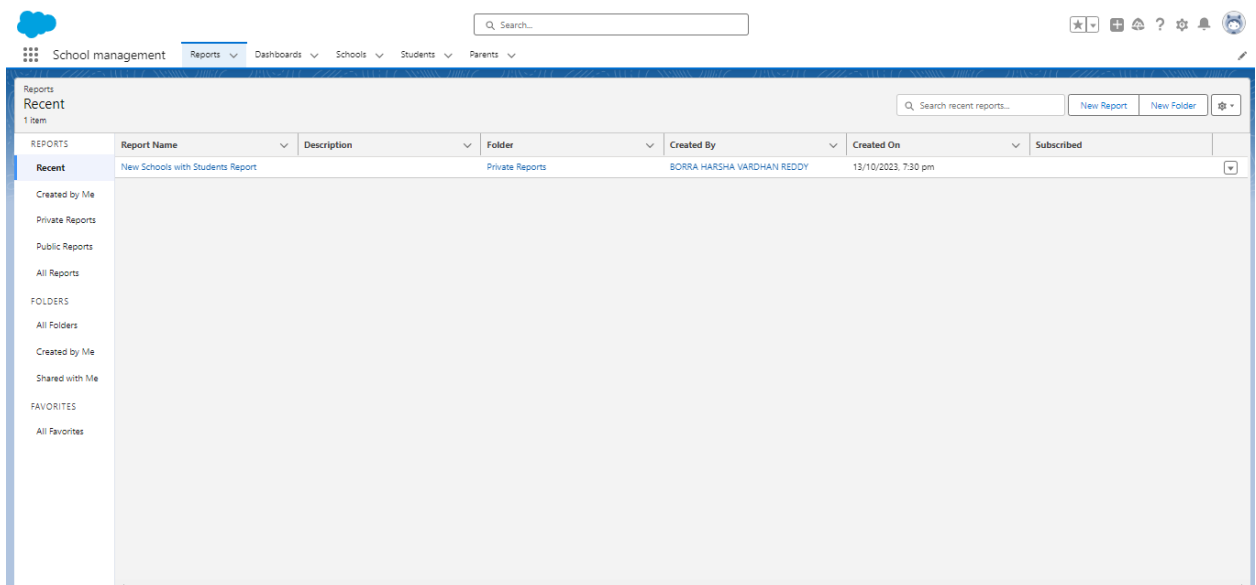
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



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



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