

PROJECT REPORT ON

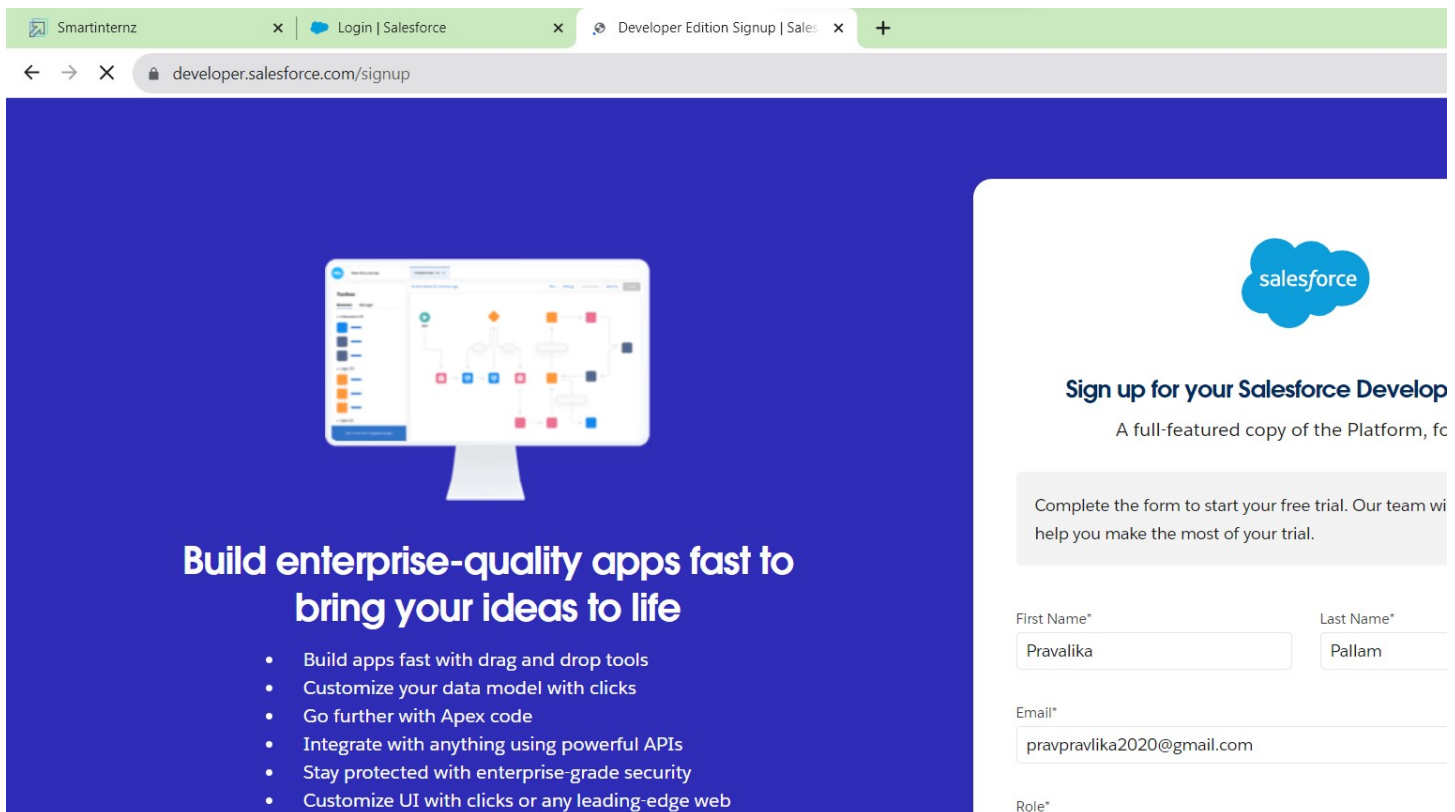
Creation Of An Application For School Management

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 cross-technology 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 -CreatingDeveloper Org

- Go to developer.salesforce.com
 - ❖ Click on sign up.
 - ❖ On the sign up form, enter the following details
 - ❖ First name & Last name – Pravalika Pallam
 - ❖ Email – pravpravalika2020@gmail.com
 - ❖ Role –SALESFORCE DEVELOPER
 - ❖ Company – GAYATRI DEGREE COLLEGE – TIRUPATI
 - ❖ Country - India
 - ❖ Postal Code – pin code 517501
 - ❖ Username – pravpravalika2020@gayatri.com



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developer.salesforce.com/signup

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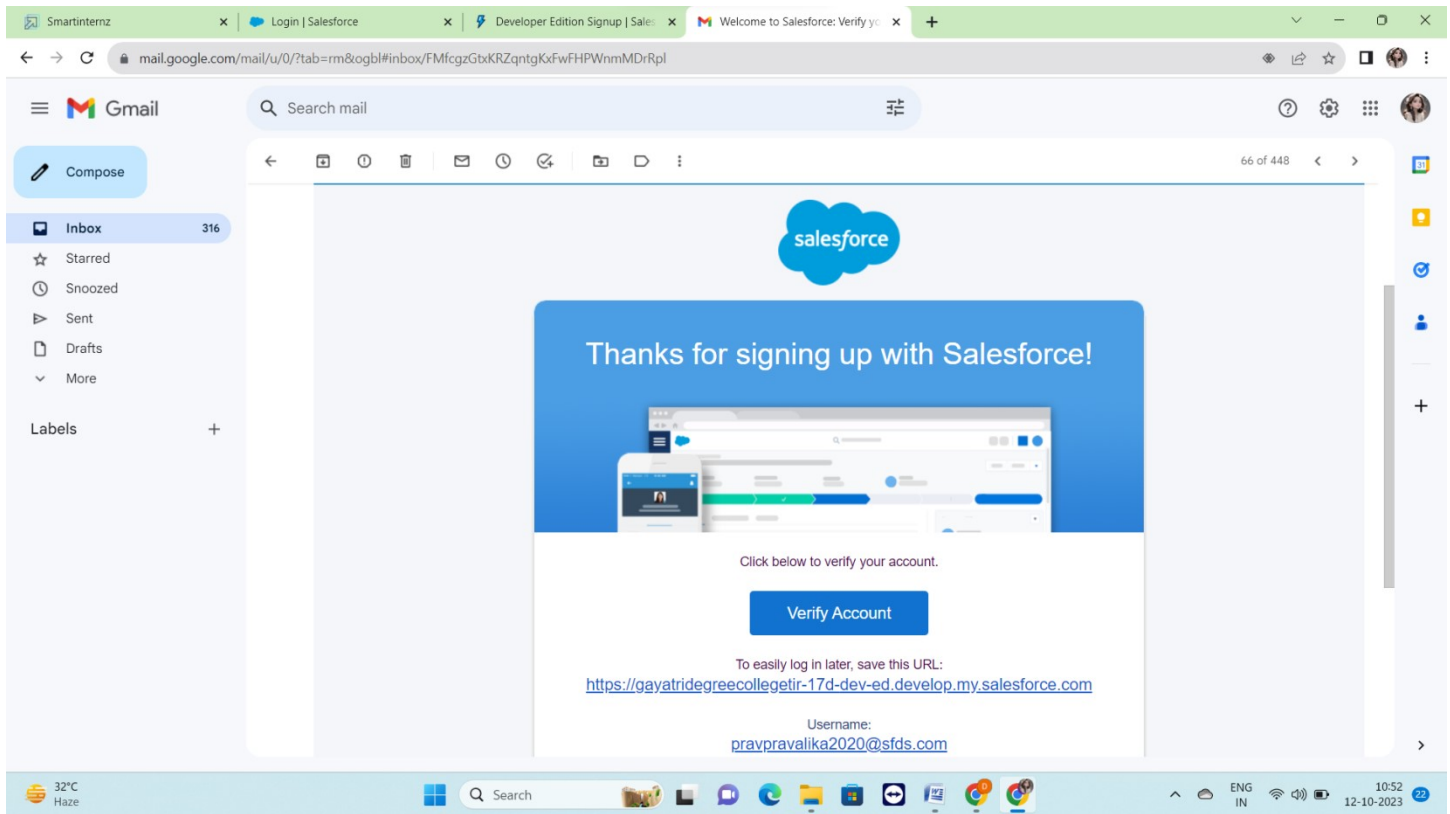
First Name* Pravalika Last Name* Pallam

Email* pravpravalika2020@gmail.com

Role*

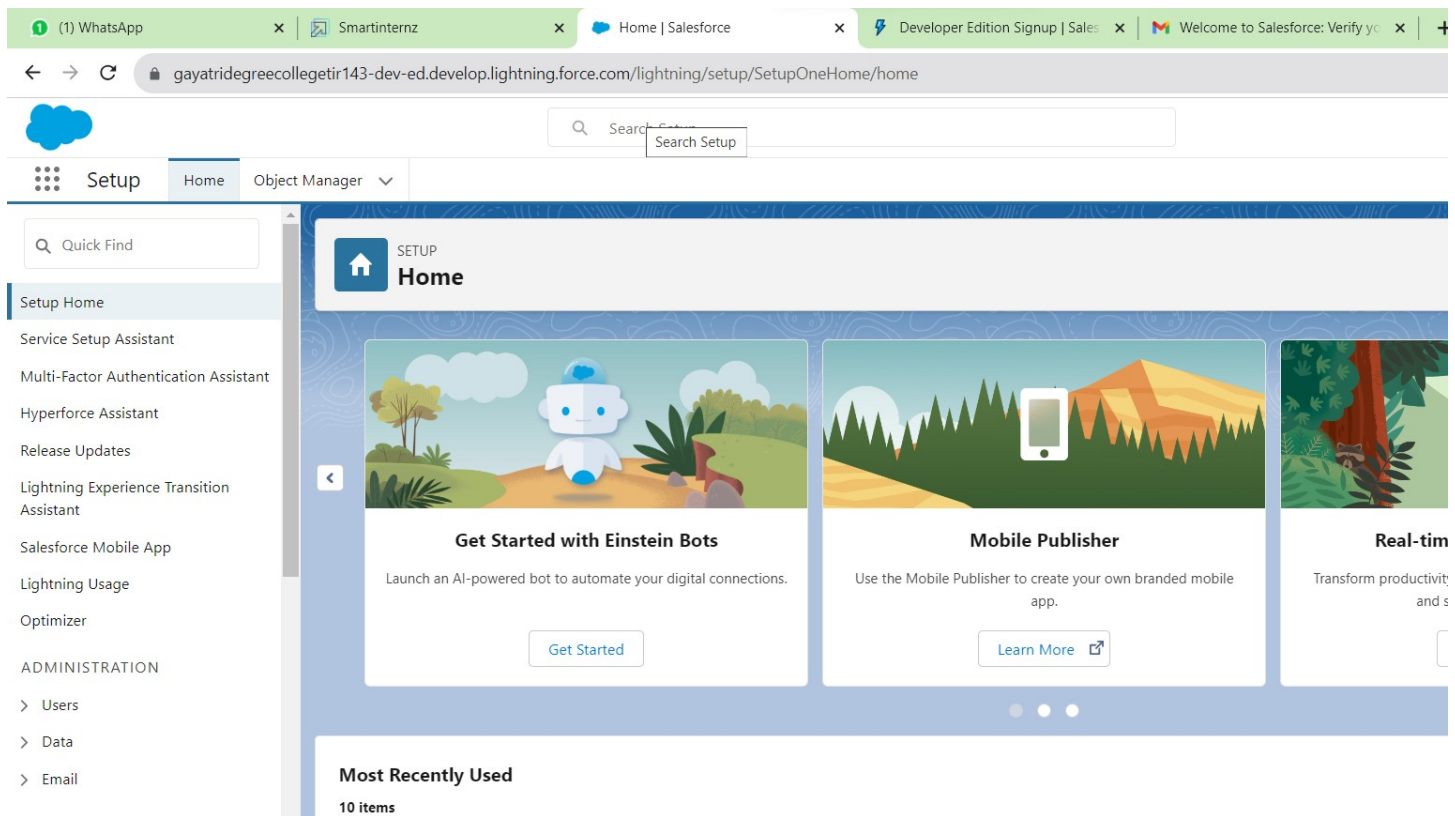
Account Activation

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



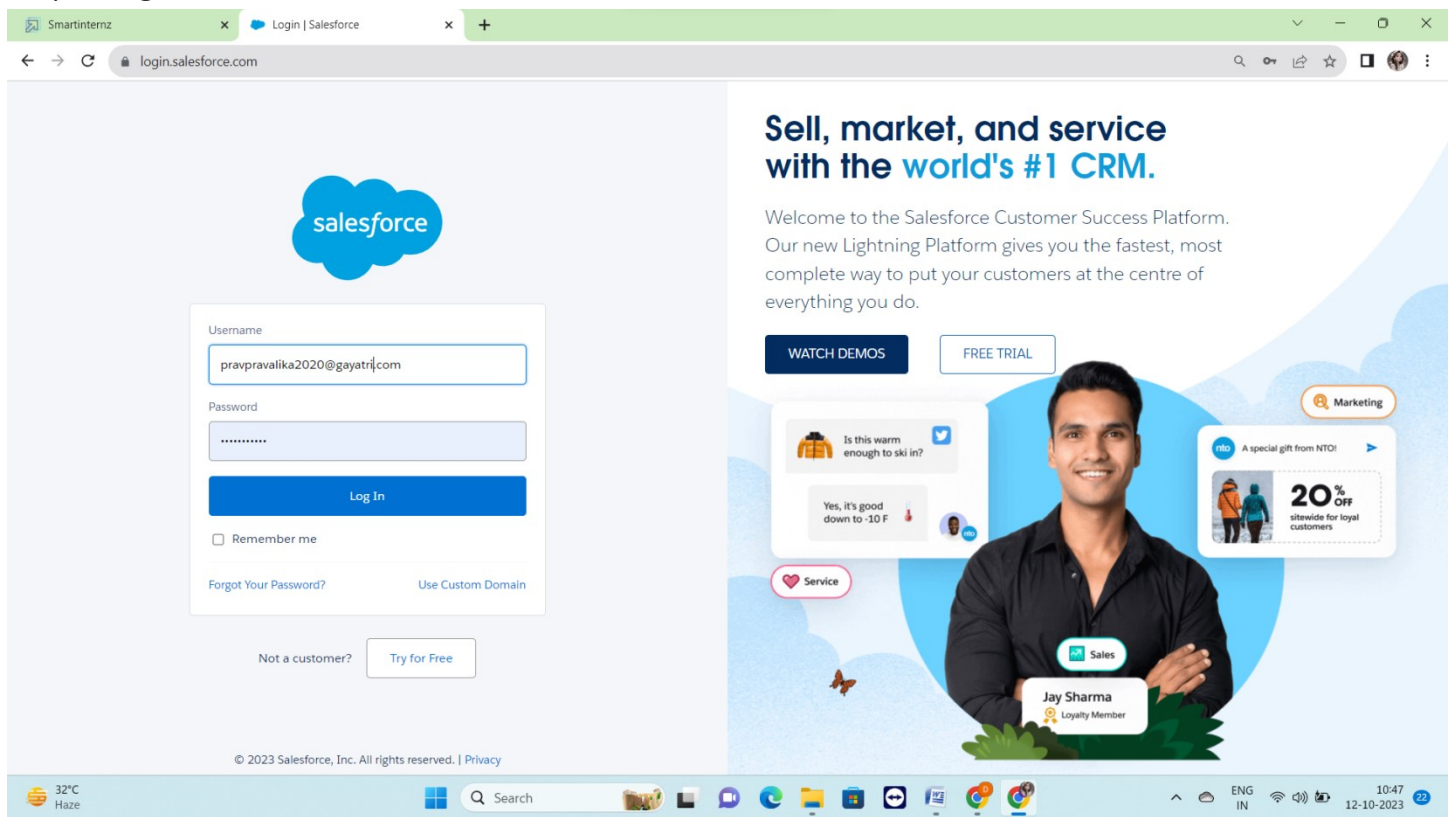
Login To Your Salesforce Account

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

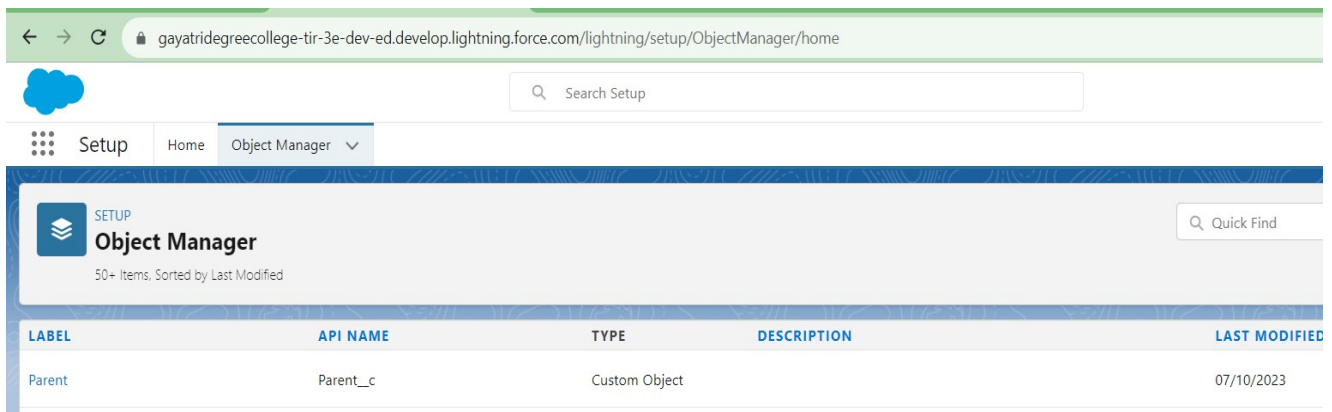
<https://login.salesforce.com>



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.

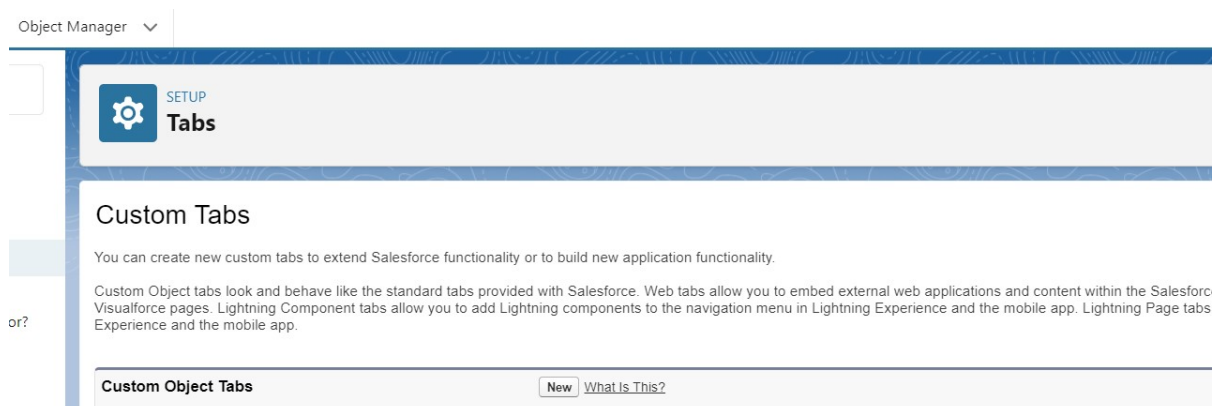
➤ **Custom Objects:** School, Student, Parent.



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `gayatridegreecollege-tir-3e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar labeled "Search Setup", and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" with a sub-header "50+ Items, Sorted by Last Modified". A table lists the objects, with the following data visible:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Parent	Parent__c	Custom Object		07/10/2023

➤ **Custom Tabs:** School, student, Parent.



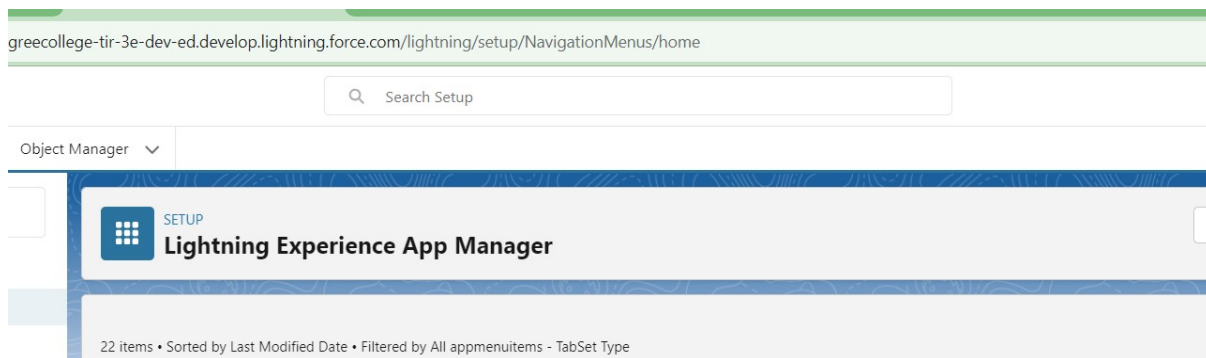
The screenshot shows the Salesforce Custom Tabs page. The browser address bar displays the URL: `gayatridegreecollege-tir-3e-dev-ed.develop.lightning.force.com/lightning/setup/Tabs/home`. The page header includes the Salesforce logo, a search bar labeled "Search Setup", and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Custom Tabs" with a sub-header "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." Below this, there is a paragraph explaining the types of custom tabs: "Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs Experience and the mobile app." At the bottom, there is a section titled "Custom Object Tabs" with a "New" button and a link "What Is This?".

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

Quick Find New Deleted Field

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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	

➤ Fields in Student Object:

Setup Home Object Manager

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships
9 Items, Sorted by Field Label

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

Quick Find New Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Parent Address	Parent Address__c	Text Area(255)	

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. The left sidebar has a search bar with 'prof' entered and a list of items including 'Profiles'. The main content area is titled 'Profiles' and shows the 'School Profile' configuration page. The page includes a 'Profile Detail' section with fields for Name, User License, Description, and Created By. Below this is a 'Page Layouts' section with a table showing standard object layouts.

Profile Detail

Field	Value
Name	School Profile
User License	Salesforce
Description	
Created By	DIVIJAAARUNACHALAMGARI, 10/10/2023, 7:19 pm

Page Layouts

Standard Object Layouts	Global	Object Milestone
	Global Layout [View Assignment]	Object Milestone [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours [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 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.

❖ **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 Neeraja mam 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.

(2) WhatsApp x Smartintenz x Developer Edition Signup x Welcome to Salesforce: Ve x Home | Salesforce x Users | Salesforce

← → ↻ gayatridegreecolletir143-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Users

All Users

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

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N

New User Reset Password(s) Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Ac
<input type="checkbox"/> Edit	ARUNACHALAMGARI .DIVIJA	DARUN	divijadivi3333@gdcproject.com		
<input type="checkbox"/> Edit	Arunachalamgari .shiva	sarun	shiva@67gmail.com		
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5g0000017sacea3.q16x58hewxw3@chatter.salesforce.com		
<input type="checkbox"/> Edit	madam .neeraja	nmada	neeraja@67gmail.com		
<input type="checkbox"/> Edit	sir .madhu	msir	madhu@67gmail.com		
<input type="checkbox"/> Edit	User .Integration	integ	integration@00d5g0000017sacea3.com		
<input type="checkbox"/> Edit	User .Security	sec	insightssecurity@00d5g0000017sacea3.com		

New User Reset Password(s) Add Multiple Users

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.

The screenshot shows the Salesforce Setup interface for Permission Sets. The left sidebar contains a search bar with 'users' entered and a list of navigation items including 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table with one entry: 'teacher.permission'.

➤ 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.

Browser tabs: (2) WhatsApp, Smartinternz, Developer Edition Signup, Welcome to Salesforce: Vel, Home | Salesforce, Permission Sets | Salesforce

Address bar: gayatridegreecollegetir143-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

Search users

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings

- Data.com
- Prospector Users

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

SETUP Permission Sets

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

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

New

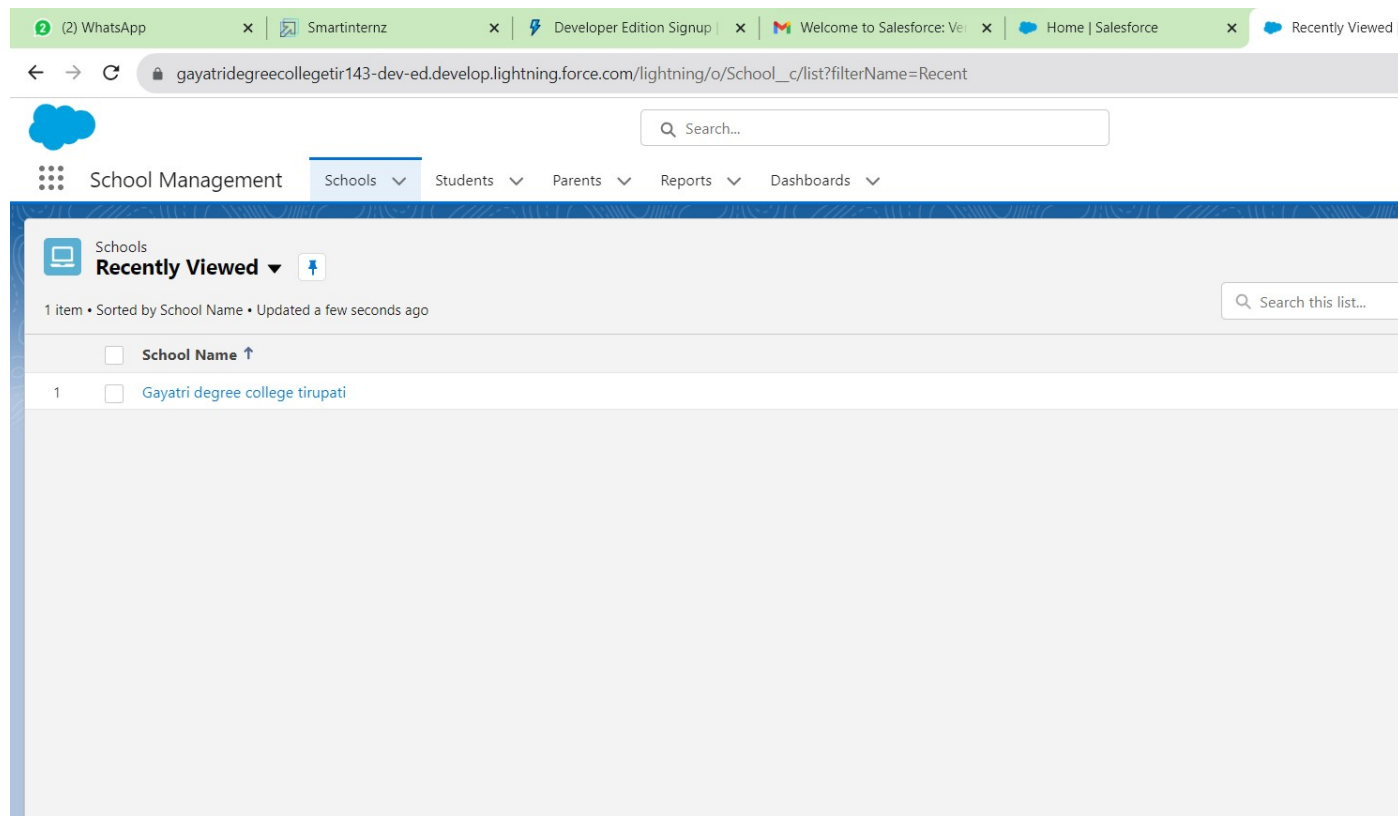
Action	Permission Set Label ↑	Description	License
Del Clone	Principal permission		

A B C D E F G H I J K L M N O

Milestone 08 - User Adoption

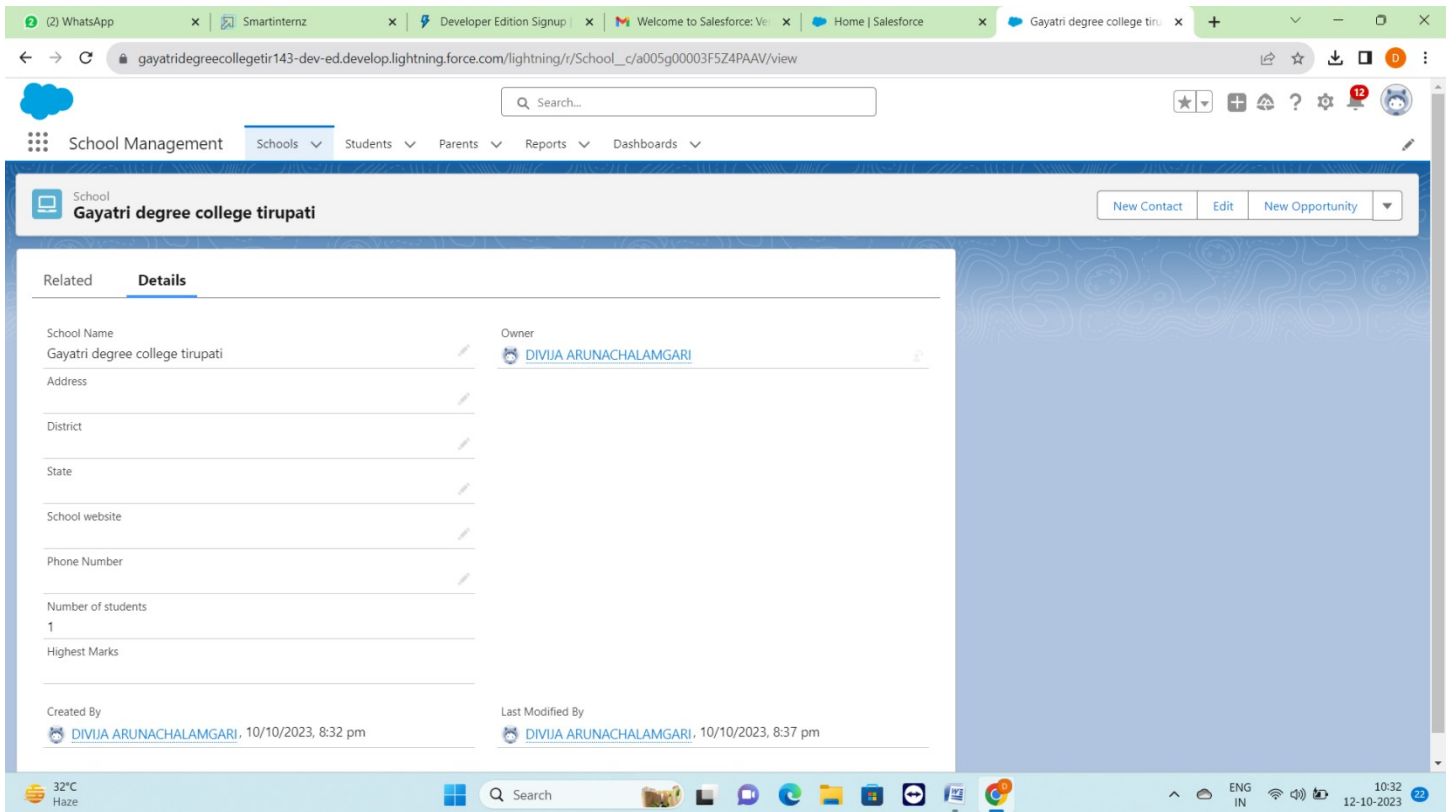
➤ Create Record (School)

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.



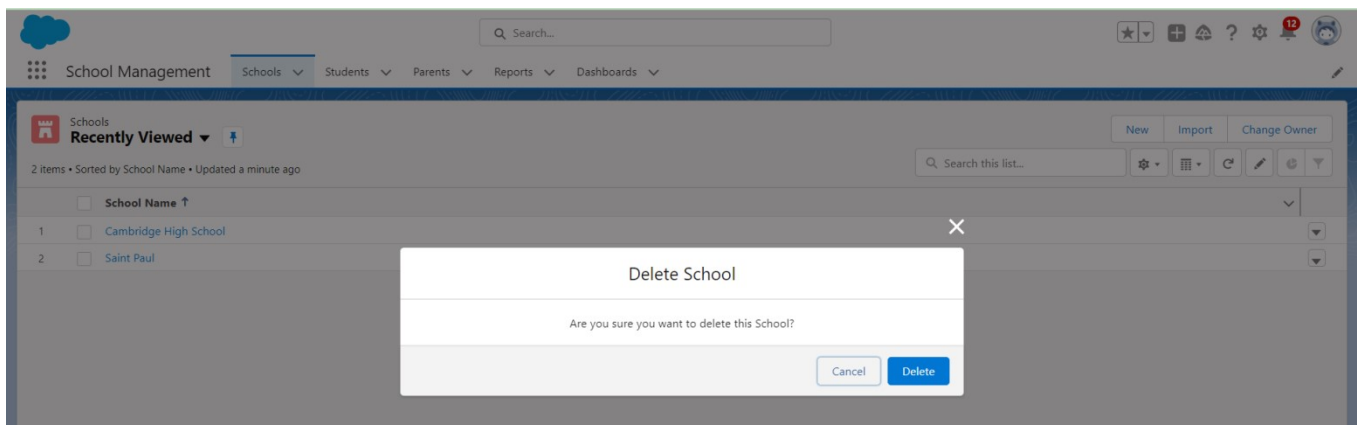
➤ View Record (School)

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



➤ 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 Salesforce Reports page. At the top, there's a navigation bar with tabs for 'School Management', 'Schools', 'Students', 'Parents', 'Reports' (selected), and 'Dashboards'. Below this, the 'Reports' section is titled 'Recent' and shows '1 item'. A search bar for 'Search recent reports...' is present. The main table lists reports with columns: 'Report Name', 'Description', 'Folder', 'Created By', and 'Created On'. The first report is 'Schools with Students Report' in the 'Private Reports' folder, created by 'DIVIJA ARUNACHALAMGARI' on '10/10/2023, 8:42 pm'. On the left sidebar, there are sections for 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).

REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Schools with Students Report		Private Reports	DIVIJA ARUNACHALAMGARI	10/10/2023, 8:42 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.

Report: Schools with Students
Schools with Students Report

Total Records
1

	School: School Name	Student: Student Name
1	Gayatri degree college tirupati	Divija

Milestone 10 –Triggers

➤ Write A Trigger

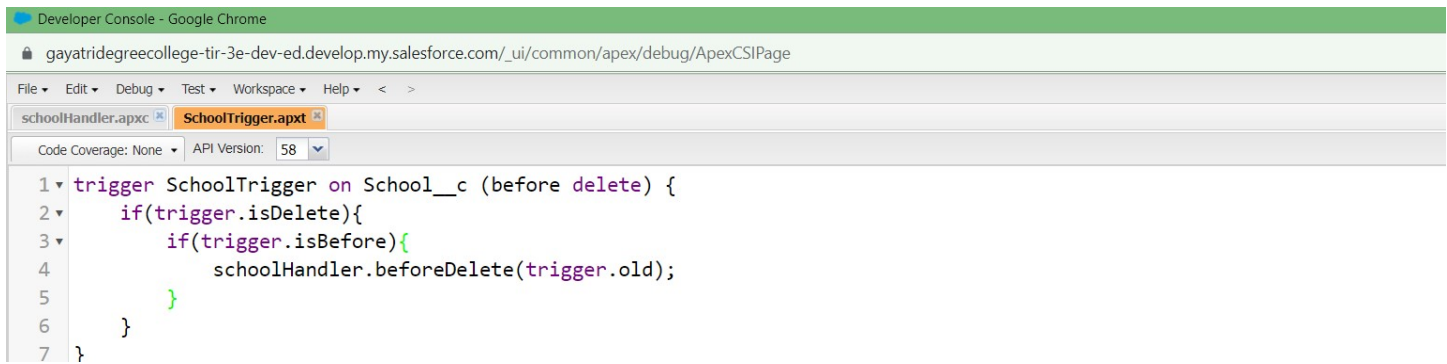
write a trigger whenever the school website is null you should be unable to delete the record.

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 }
  
```

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



The screenshot shows the Salesforce Developer Console interface. The top bar indicates the browser is Google Chrome. The address bar shows the URL: `gayatridegreecollege-tir-3e-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The console has tabs for `schoolHandler.apxc` and `SchoolTrigger.apxt`, with the latter being the active file. Below the tabs, there are settings for 'Code Coverage: None' and 'API Version: 58'. The main area displays the following Apex code:

```
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. ApiName: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.

2 WhatsApp

Smartinternz

Developer Editio

Welcome to Sale


Home | Salesforce

Schools with Stu

Flows | Salesforce

Flows | Salesforce

gayatridegreecollegetir143-dev-ed.develop.lightning.force.com/lightning/setup/Flows/page?address=%2F3005g000000qOs0%3FsfcdclFrameOrigin%3Dhttps%253A%252F%252F



Search Setup

Setup

Home

Object Manager

flows

Process Automation

Flows

Identity

Login Flows

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

SETUP

Flows

Flow

Student flow

« Back to List: Flows

Flow Detail

Edit

Open

Run

Delete

Flow Label	Student flow	Flow API Name	Student_flow
Description		Namespace Prefix	
Environments	Default	Type	Autolaunched Flow
Active Version	1	URL	/flow/Student_flow
Trigger	Record—Run After Save	Activated/Deactivated By	DIVIJAAARUNACHA
Modified By	DIVIJAAARUNACHALAMGARI, 12/10/2023, 10:37 am	Created By	DIVIJAAARUNACHA

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Run in Mode
Open Run Deactivate	Student flow	1		Flow Builder	10/10/2023, 9:27 pm	Autolaunched Flow	Active	Default Mode

The End