

CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT - DEVELOPER - (SHORT-TERM)

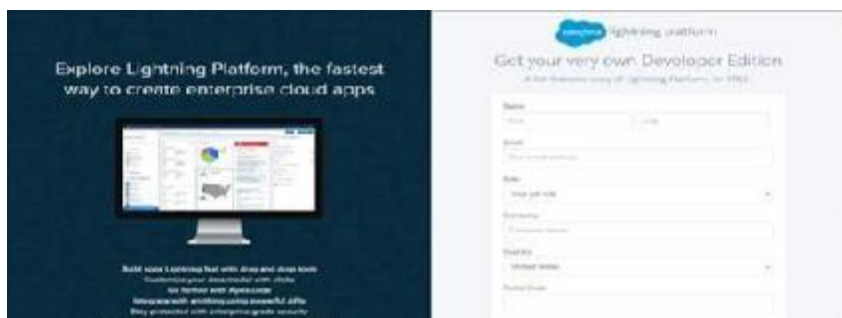
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

Introduction

1. Go to developer.salesforce.com
2. Click on sign up.
3. On the sign up form, enter the following details
 - a. First name & Last name
 - b. Email
 - c. Role - Developer
 - d. Company - College Name
 - e. Country - India
 - f. Postal Code - pin code
 - g. Username- should be a combination of your name and company

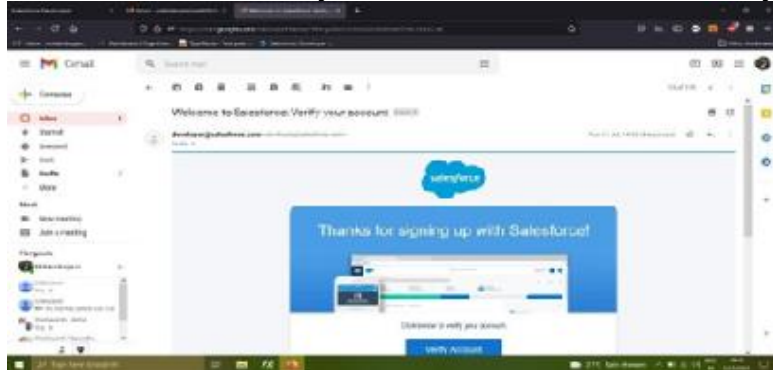
This need not be an actual email id, you can give anything in the format username@organization.com

Click on sign up after filling these.



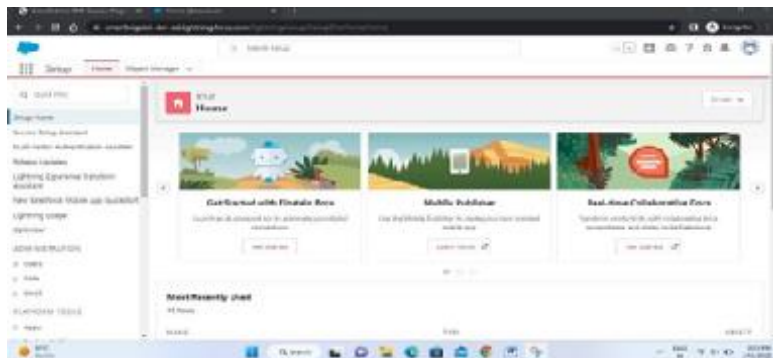
Account Activation

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

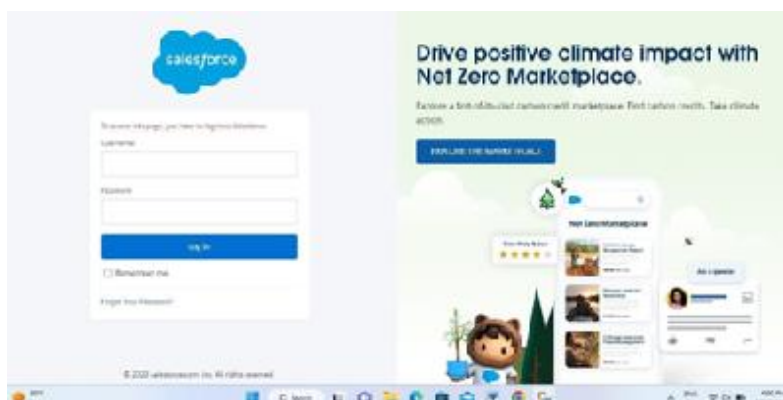


Login To Your Salesforce Account

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>

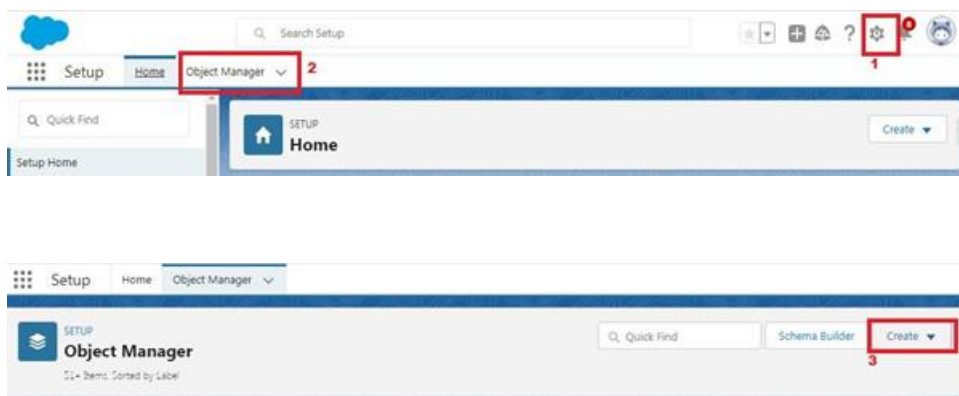


Object

Creation Of School Object Creation Of Objects For School Management

For this school management we need to create 3 objects School, Parents and Student. The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: School
6. Plural Label: Schools
7. Record Name: School Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



SETUP **New Custom Object**

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in table views, layouts, and records.

☒ **Singular Label** Example: Account
☒ **Plural Label** Example: Accounts
☐ **Starts with "Team Prefix"**

The Object Name is used when referencing the object in the API.

Object Name Example: Account
Description

Custom Serviceable Field Settings [Learn More](#) [Feedback](#)

ENTER RECORD NAME LABEL AND FORMAT

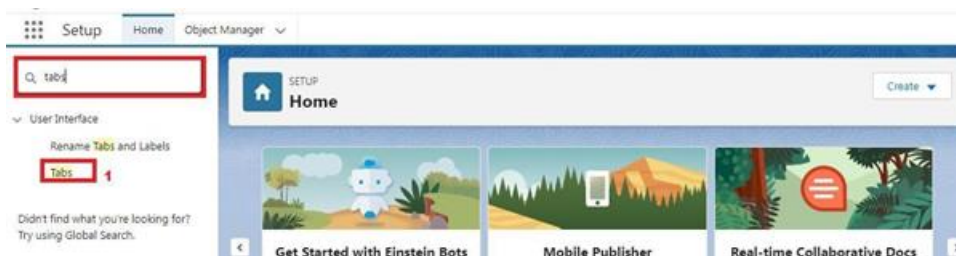
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name has a maximum length of 100 characters, and is referenced in the API.

Record Name Example: Account Name
Record Type

Optional Features

☒ **Allow Reports**
☐ **Track Field History**
☐ **Allow in Chatter Groups**
☐ **Enable Licensing**

Now create a custom tab. Click the Home tab.



Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now:

Object: --None--

Tab Style: [] [gear icon]

Create Student Object

1. Click on the gear icon and then select Setup.
 2. Click on the object manager tab just beside the home tab
 3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:
 - Label: Student
 - Plural Label: Students
 - Record Name: Student Name
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox
 - Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

Create Parent Object

Click on the gear icon and then select Setup.

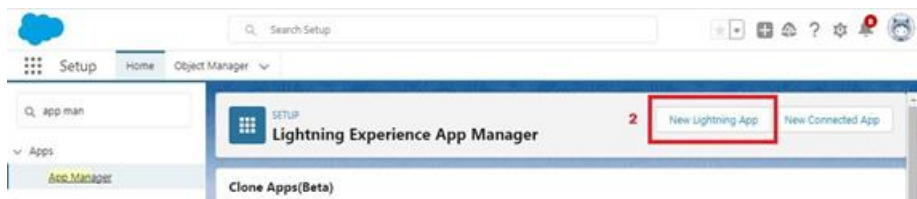
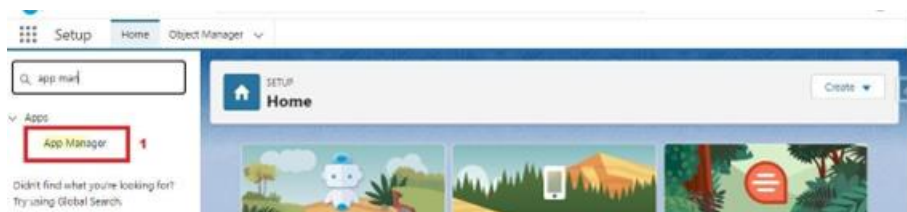
1. Click on the object manager tab just beside the home tab.
 2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:
 - Label: Parent

- Plural Label: Parents
- Record Name: Parent Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Lightning App

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.



App Details & Branding

Give your Lightning app a name and description, upload an image and choose the highlight color for its navigation bar.

App Details

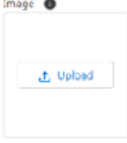
App Branding

3

*App Name ⓘ
school management

*Developer Name ⓘ
school_management

Description ⓘ

Image ⓘ

[Upload](#)

Primary Color Hex Value ⓘ

■

#0070C0

Next

As you rename the items that you add, some navigation items are available only for phone or only for tablet. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

6

Available Items

Create

Search: repo ⓘ

Reports

Selected Items

Schools

Students

Parents

Dashboards

click to add items

Back

Next

User Profiles

Choose the user profiles that can access this app.

7

Available Profiles

Search: system ⓘ

Salesforce API Only System Integrati...

System Administrator

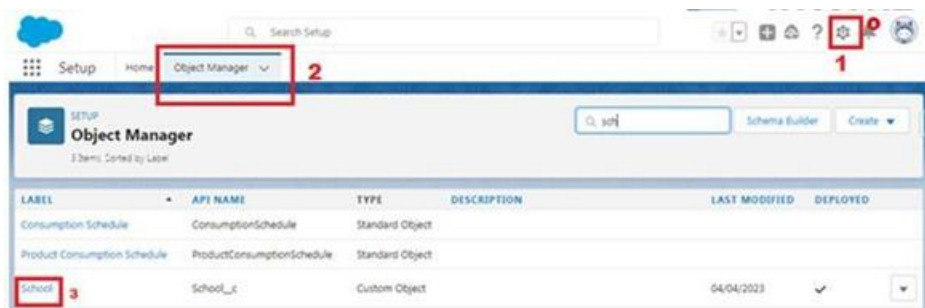
Selected Profiles

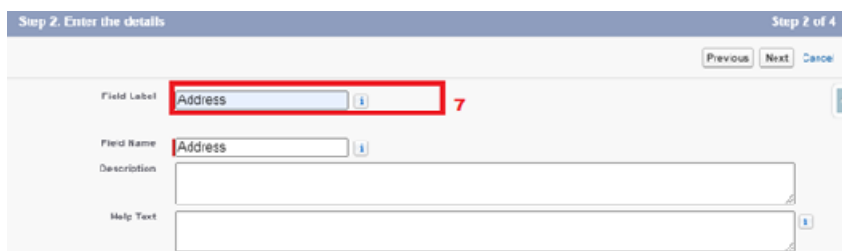
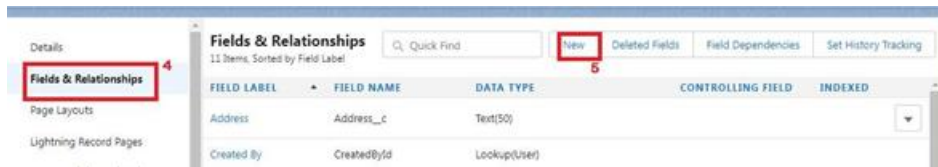
Save or Cancel

Fields And Relationship

Creation Of Fields For The School Objects

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text Area as the Data Type, click Next.
7. For Field Label, enter Address.
8. Click Next, Next, then Save & New.
9. Follow steps 1 to 3 and create two more Text type field - District & State.
10. Create URL type field & give School website as the field label.





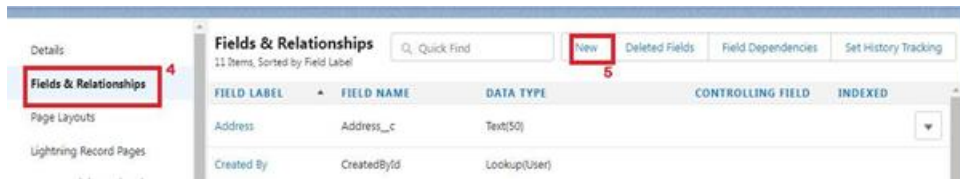
Creation Of Fields For The Student Objects

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New



Let's create a master-detail relationship with School object

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.



Let's create a Pick-List field:

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
6. Pass
7. Fail
8. Click Next, Next, then Save & New

Let's create a Number field:

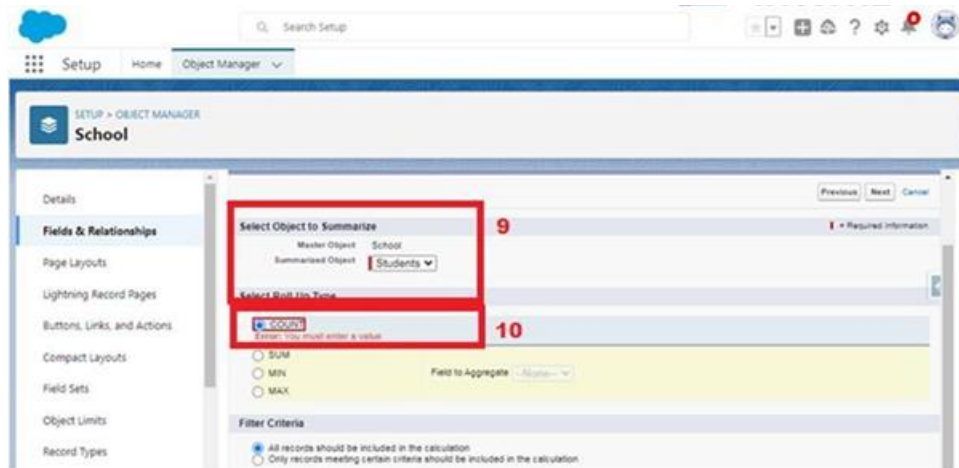
Note- Follow above steps 1 to 5 to create field and then follow below steps

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.



Let's create Roll-up summary fields on School Object to calculate the number of students

1. Click gear icon Select Setup, This launches Setup in a new tab.
2. click Object Manager
3. Select School.
4. Click Fields & Relationships
5. Click New.
6. Select the Roll-up summary field as data type
7. Enter the field label as Number of students
8. Click Next
9. Then select the master object summarized as students
10. Select count as roll-up and then click Next, Next and save.



Create one more rollup summary field-

- From Setup, click Object Manager and select School.
- Click Fields & Relationships, then New.
- Select the Roll-up summary field as data type
- Enter the field label as Highest Marks
- Click Next
- Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate.
- click Next, Next and save.

Creation Of Fields For The Parent Objects

- Select the Text Area as the Data Type, then click Next.
- For Field Label, enter Parent Address.
- Click Next, Next, then Save & New.
- Select the Phone as the Data Type, then click Next.
- For Field Label, enter Parent Number.
- Click Next, Next, then Save & New