

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

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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

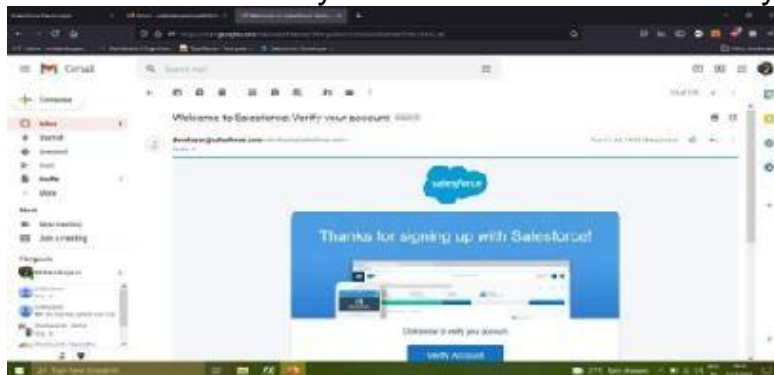
This need not be an actual email id, you can give anything in the format `username@organization.com`

Click on sign up after filling these.



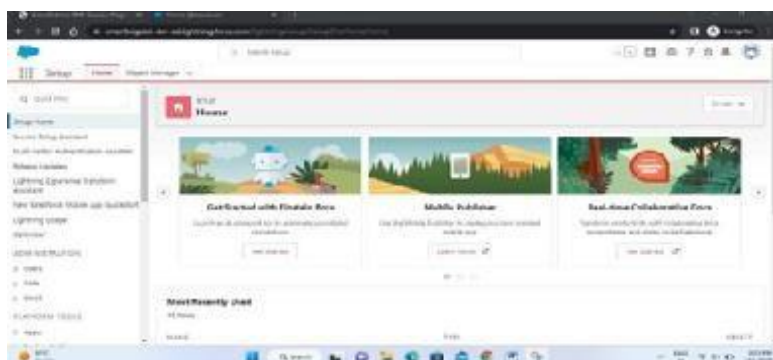
Account Activation

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](https://login.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>

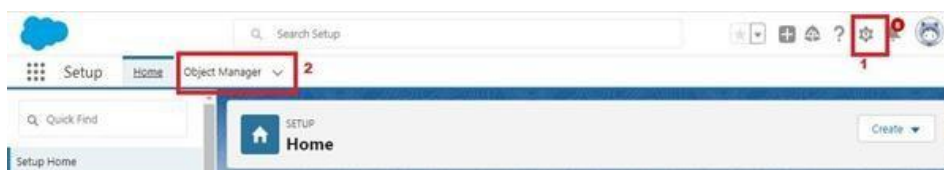


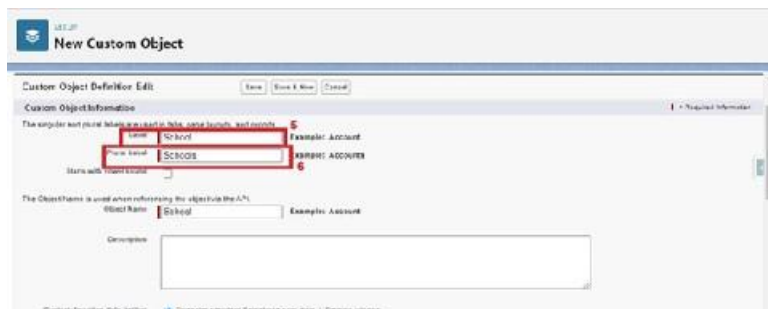
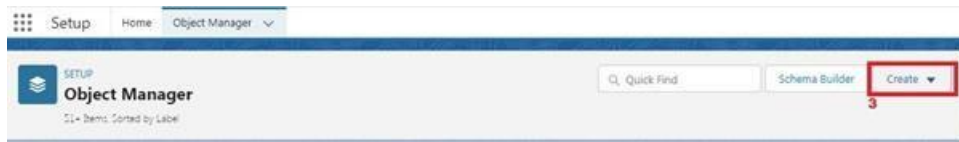
Object

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.

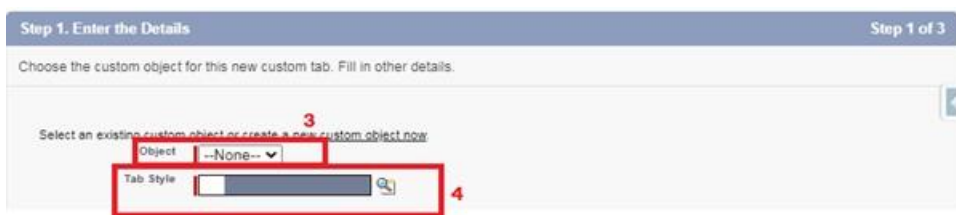
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as 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.





Now create a custom tab. Click the Home tab.





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

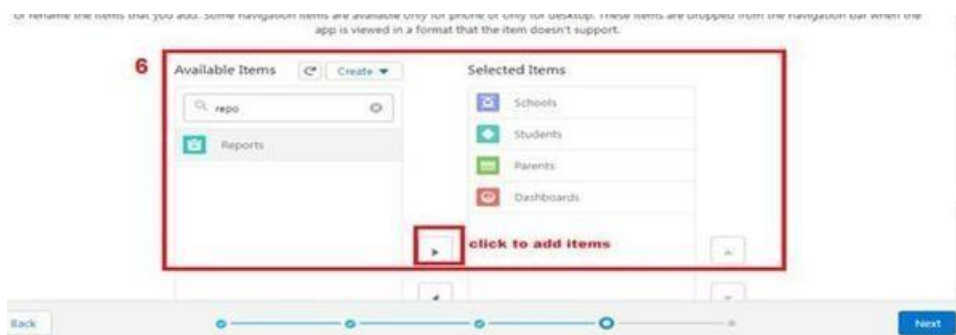
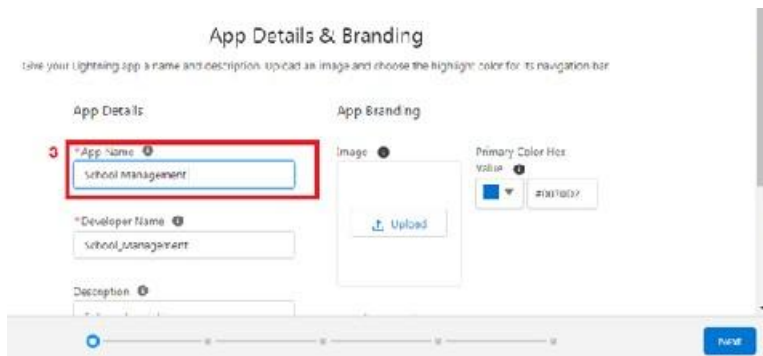
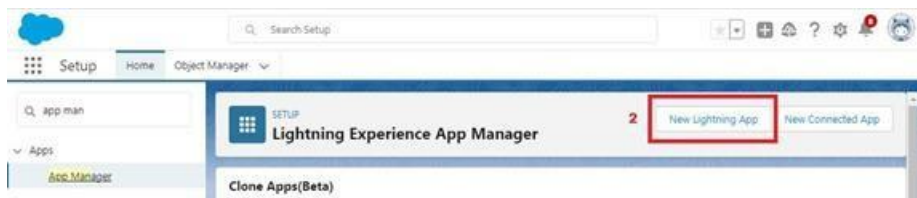
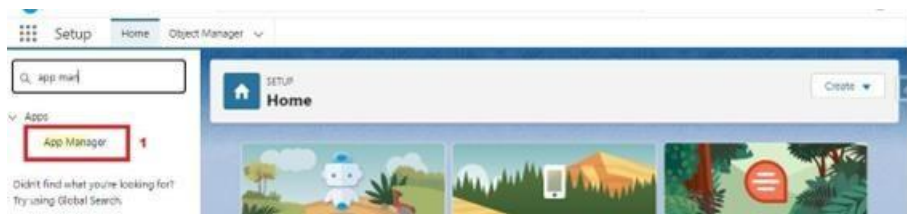
Click on the gear icon and then select Setup.

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.



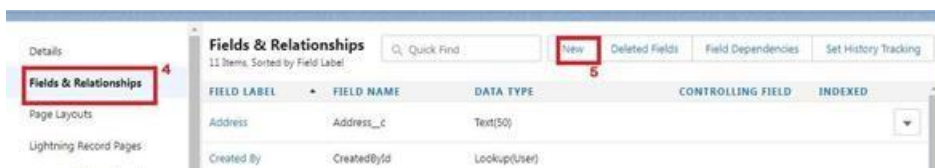
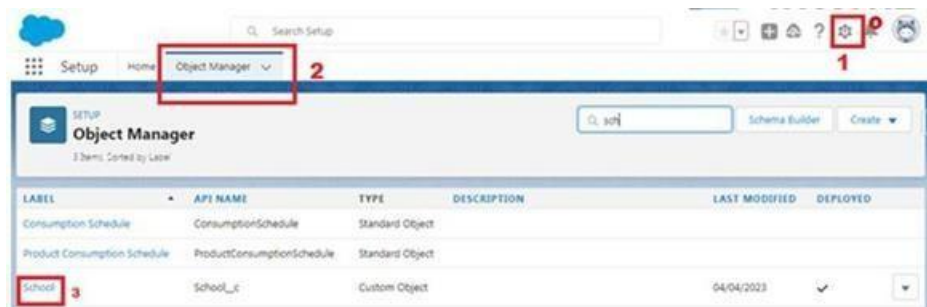


Fields And Relationship

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

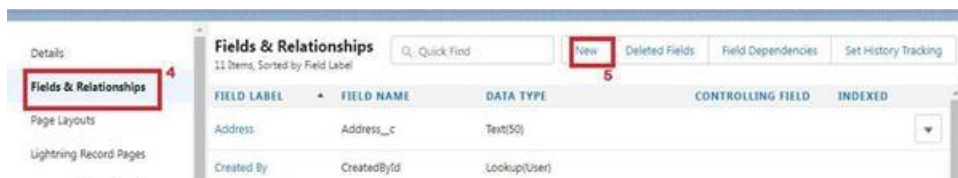
1. Select the Phone as the Data Type, then click Next.

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.

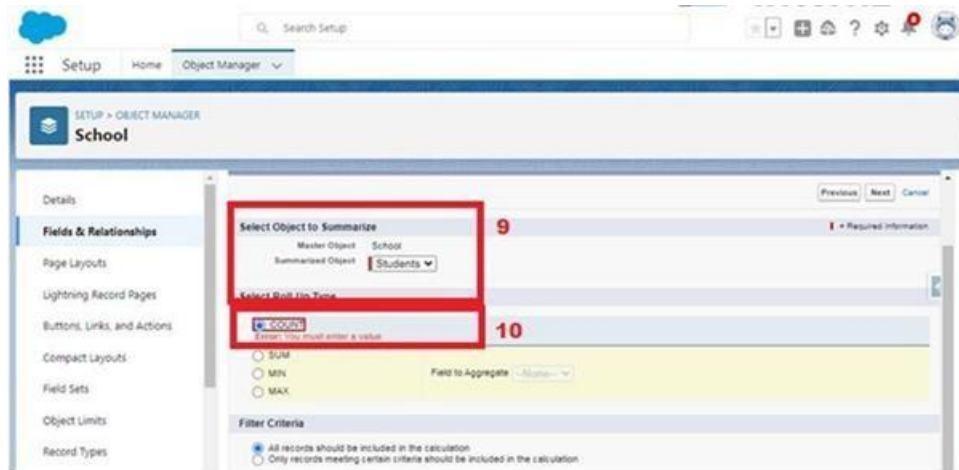
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

The screenshot shows the 'Data Type' selection interface in Salesforce. It lists several data types with their descriptions:

- ☐ None Selected: Select one of the data types below.
- ☐ Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- ☐ Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change. (Marked with a red '6')
- ☒ Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list. (Highlighted with a red rectangle)
- ☐ Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- ☐ Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- ☐ External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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 rollout 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