

Project Report

Creation of An Application for School Management-Admin

1. Introduction:

Welcome to Salesforce. Salesforce is game-changing technology with a host of productivity-boosting features that will help you sell smarter and faster. As you walk toward your badge for this module, we will take you through these features and answer the question, what is Salesforce anyway?

What is Salesforce?

Salesforce is your Customer Success platform. Designed to help you sell, service, market, analyze and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Creating a Developer org in Salesforce:

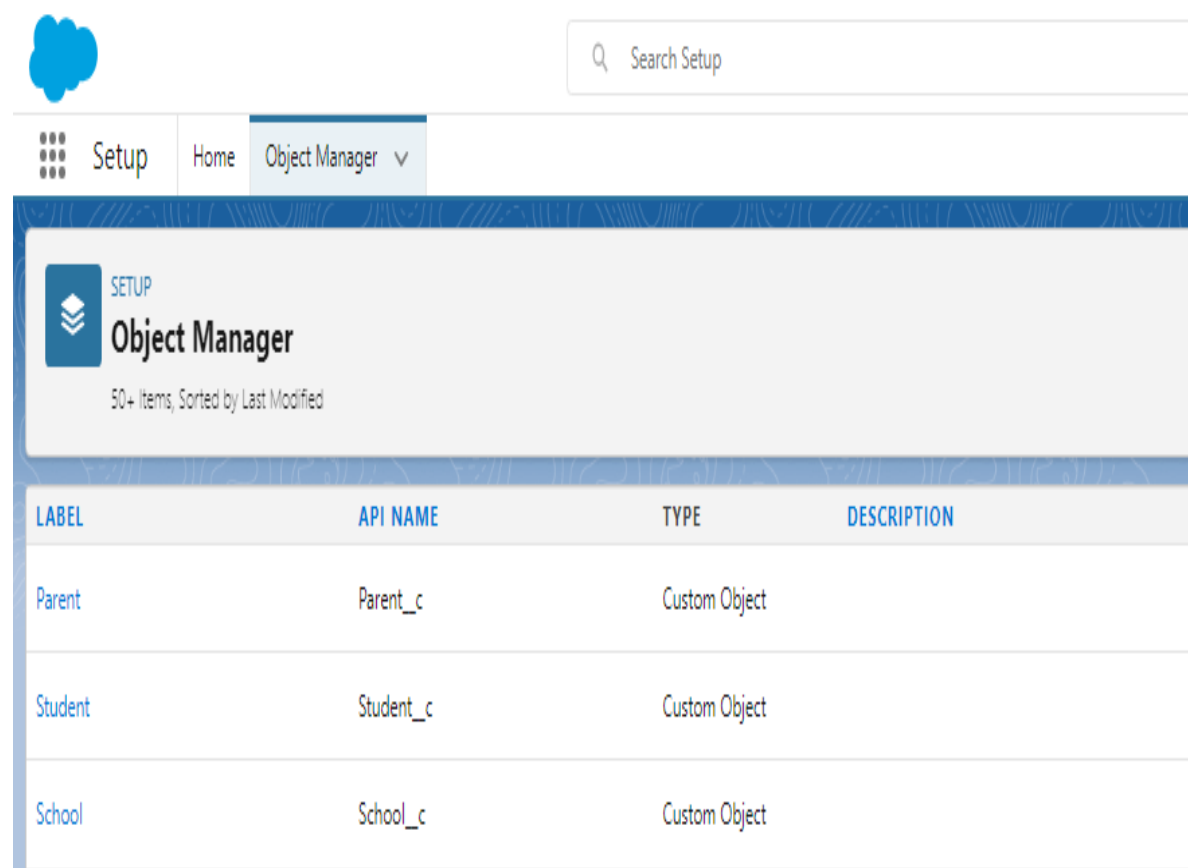
- Go to developer.salesforce.com
- Click on sign up.
- On the sign-up form, enter the following details
- | | | |
|---------------------------|---|----------------------------------|
| a. First name & Last name | - | Triveni & Chinthala |
| b. Email | - | trivenichinthala357@gmail.com |
| c. Role | - | Developer |
| d. Company | - | Gayatri Degree College -Tirupati |
| e. Country | - | India |
| f. Postal Code | - | 517583 |
| g. Username | - | triveni032002@gdc.com |

2. Create Objects – School, Student & Parent

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:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

For this school management we need to create 3 objects called School, Parent and Student.



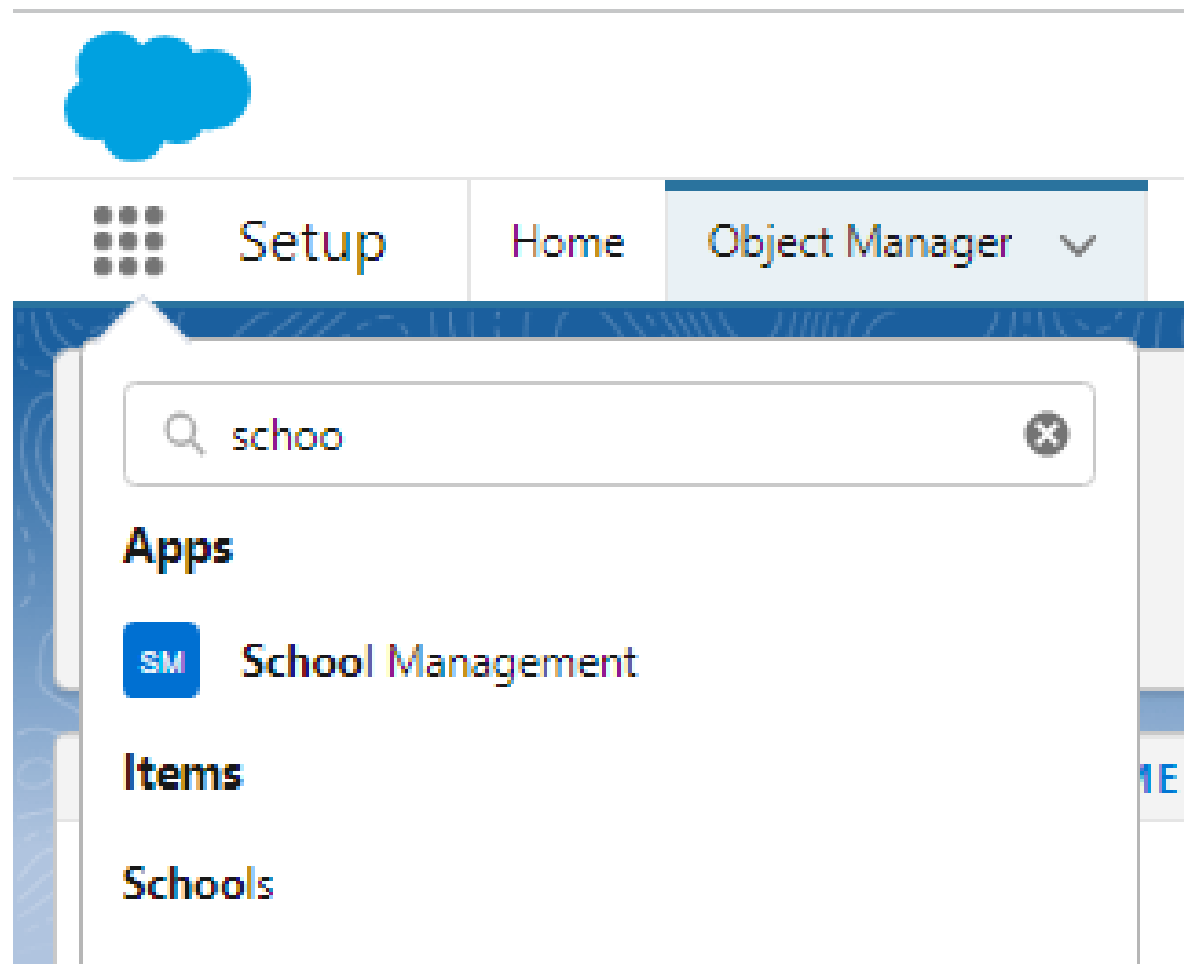
The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager" (which is selected). The main content area is titled "Object Manager" with a sub-header "50+ Items, Sorted by Last Modified". Below this is a table listing custom objects.

LABEL	API NAME	TYPE	DESCRIPTION
Parent	Parent__c	Custom Object	
Student	Student__c	Custom Object	
School	School__c	Custom Object	

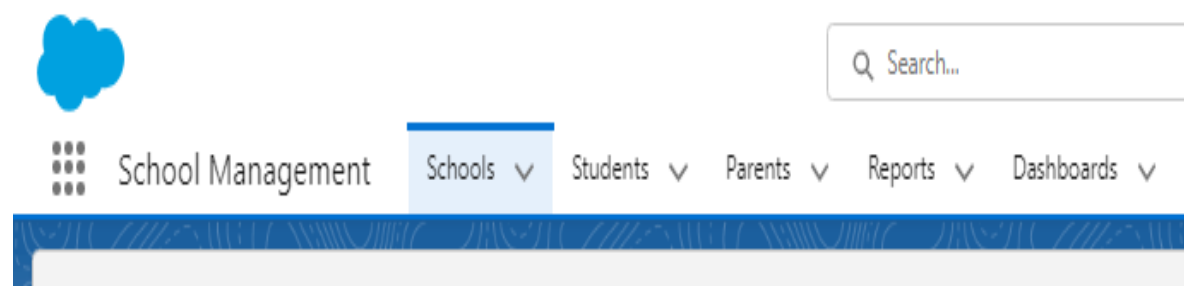
3. Lightning app:

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. The simplest app usually has just two tabs.

Create the School Management App:



- Click App Launcher, Searching School Management and the Lightning app we created are now visible.

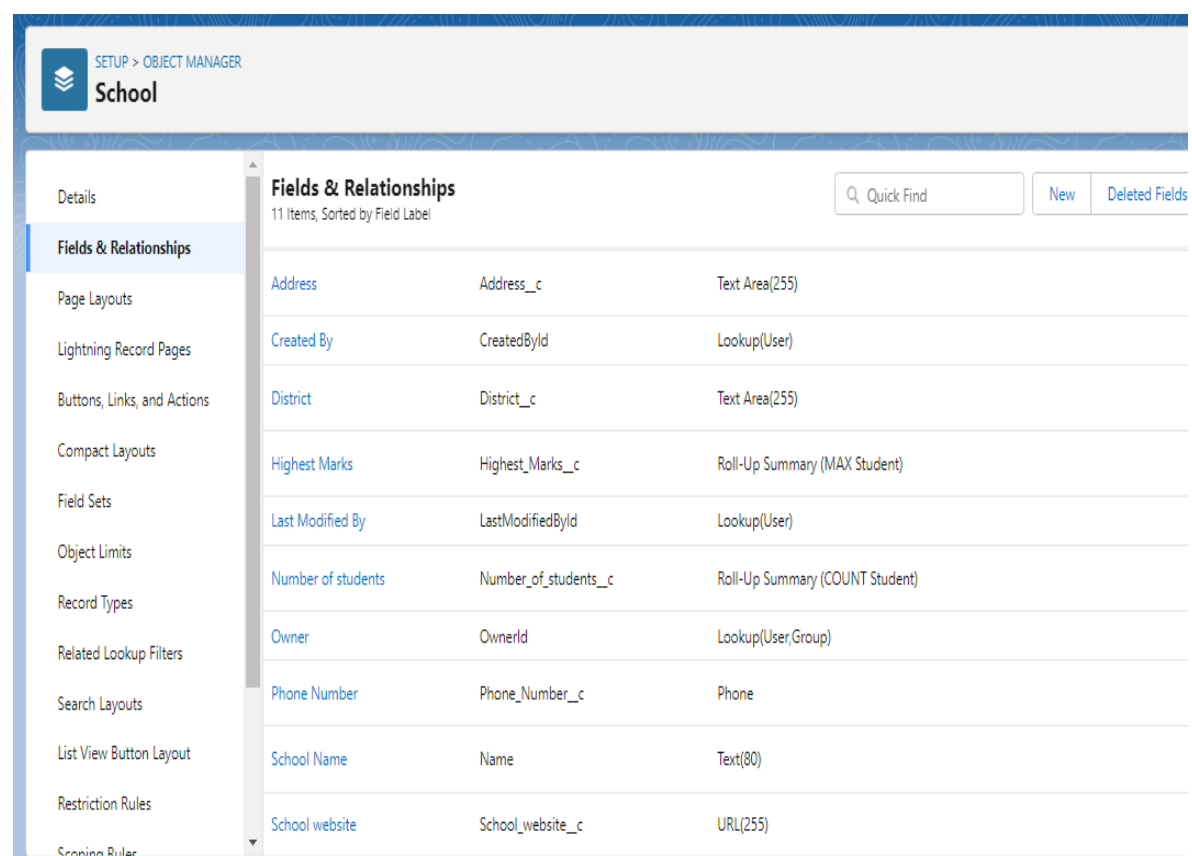


4. Fields and Relationships:

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.

Here we must create various Fields for School, Student & Parent objects.

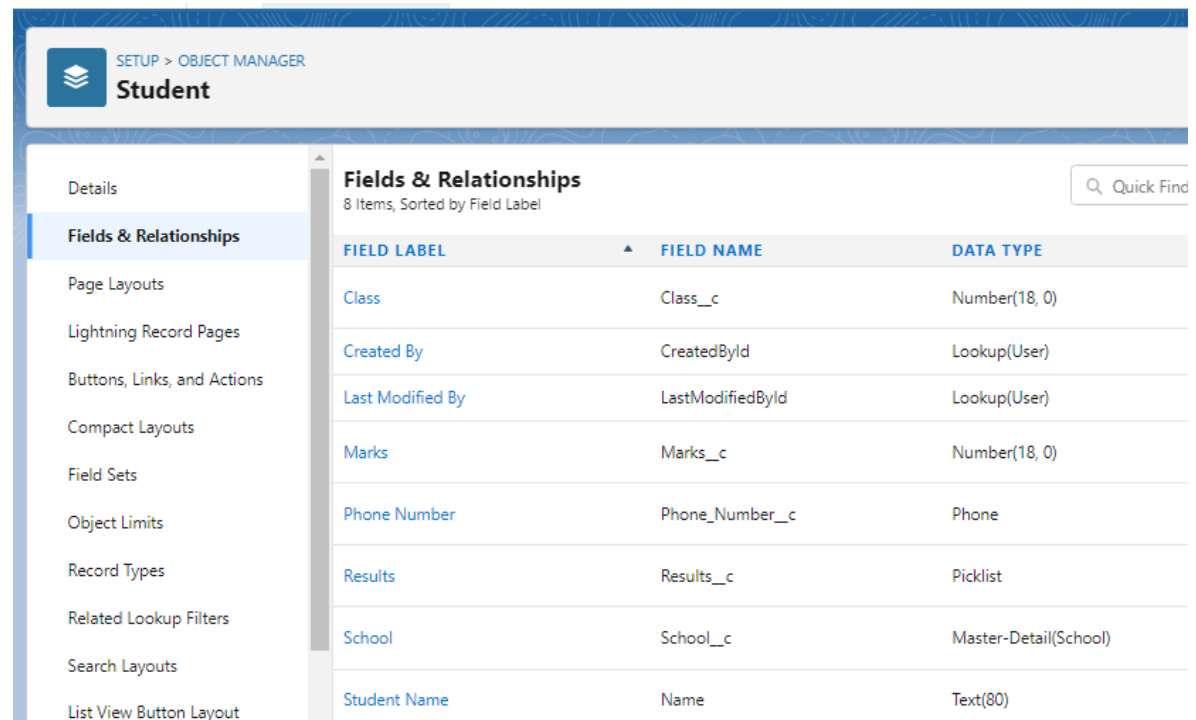
Creation of Fields for the School objects:



The screenshot shows the Salesforce Setup page for the 'School' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows 11 items, sorted by Field Label. A 'Quick Find' search bar and 'New' and 'Deleted Fields' buttons are located at the top right of the main content area. The table below lists the fields:

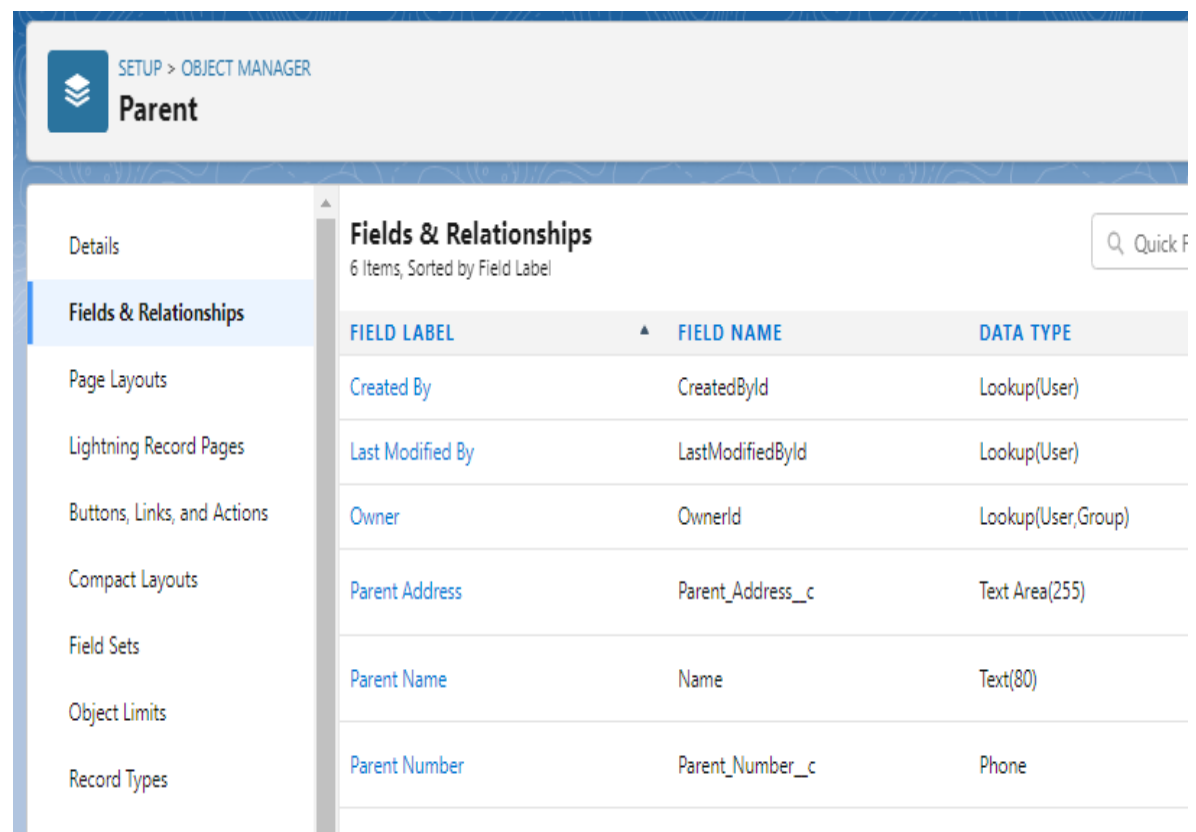
Field Label	Field Name	Field Type
Address	Address__c	Text Area(255)
Created By	CreatedById	Lookup(User)
District	District__c	Text Area(255)
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)
Last Modified By	LastModifiedById	Lookup(User)
Number of students	Number_of_students__c	Roll-Up Summary (COUNT Student)
Owner	OwnerId	Lookup(User,Group)
Phone Number	Phone_Number__c	Phone
School Name	Name	Text(80)
School website	School_website__c	URL(255)

Creation of Fields for the Student objects:



SETUP > OBJECT MANAGER		
Student		
Details	Fields & Relationships 8 Items, Sorted by Field Label	
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		
FIELD LABEL	FIELD NAME	DATA TYPE
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)

Creation of Fields for the Parent Objects:



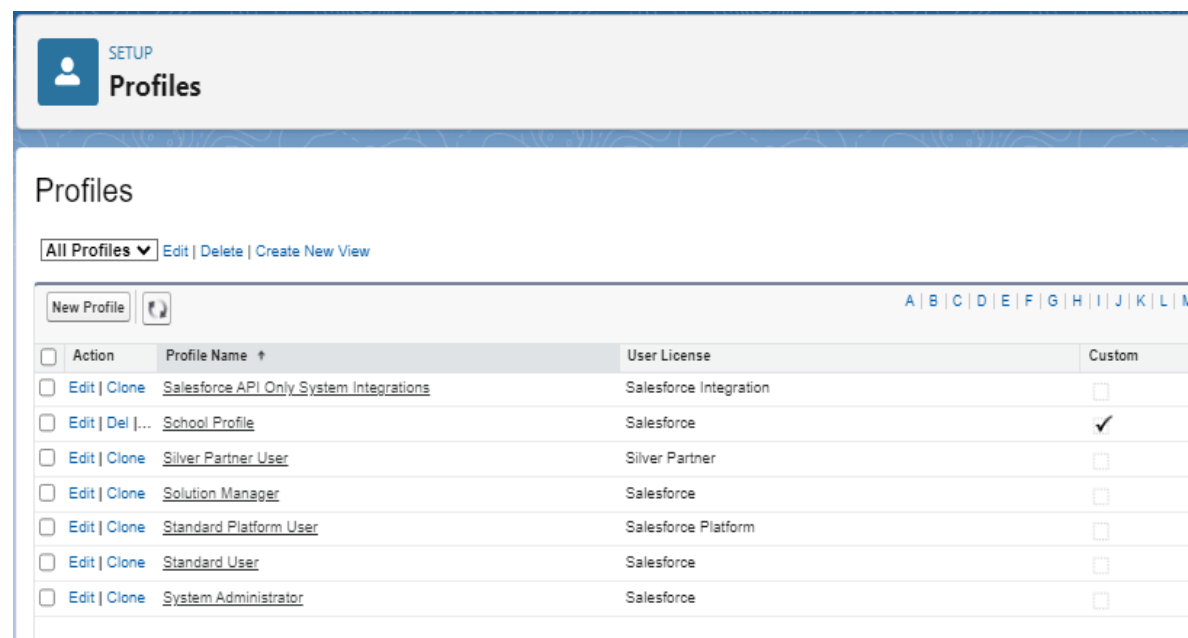
SETUP > OBJECT MANAGER		
Parent		
Details	Fields & Relationships 6 Items, Sorted by Field Label	
Fields & Relationships		
Page Layouts		
Lightning Record Pages		
Buttons, Links, and Actions		
Compact Layouts		
Field Sets		
Object Limits		
Record Types		
FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	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

5. Profile:

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

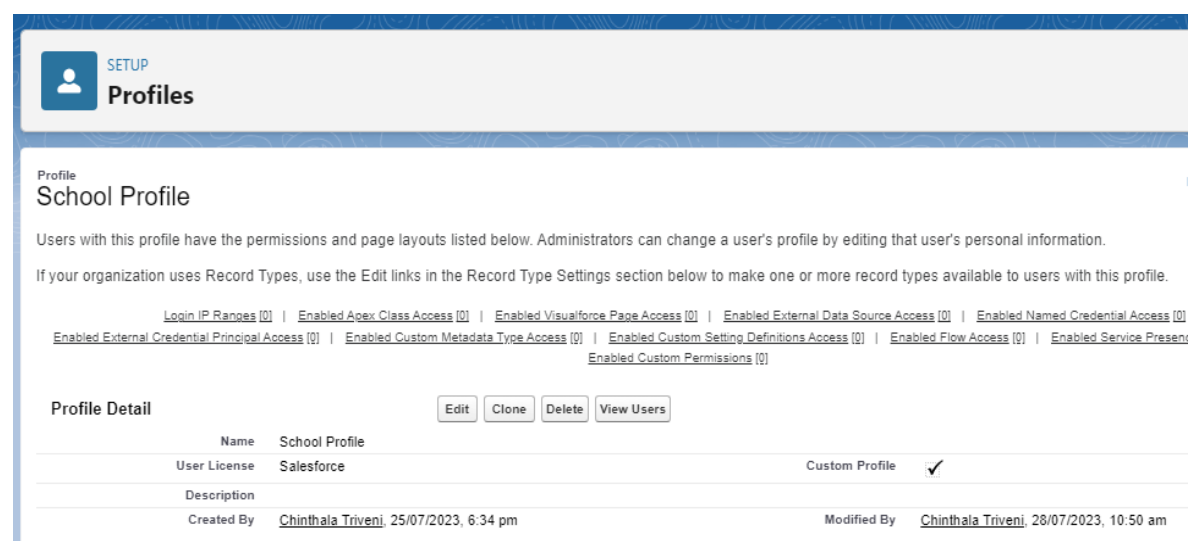
Here we are creating a profile name called “School Profile”. And giving access to all custom object permissions.

Creation on Profile:



The screenshot shows the Salesforce Setup interface for Profiles. The header includes a user icon and the word "SETUP" in blue, followed by "Profiles" in bold. Below the header, the word "Profiles" is displayed. A dropdown menu shows "All Profiles" with links for "Edit", "Delete", and "Create New View". A "New Profile" button is visible. A table lists existing profiles with columns for Action, Profile Name, User License, and Custom. The "School Profile" is highlighted with a checkmark in the Custom column.

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Delete ...	School Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>



The screenshot shows the Salesforce Setup interface for the "School Profile". The header includes a user icon and the word "SETUP" in blue, followed by "Profiles" in bold. Below the header, the word "Profile" is displayed, followed by "School Profile". A description states: "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." Below this, a note says: "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." A list of permissions is shown, including "Login IP Ranges", "Enabled Apex Class Access", "Enabled Visualforce Page Access", "Enabled External Data Source Access", "Enabled Named Credential Access", "Enabled External Credential Principal Access", "Enabled Custom Metadata Type Access", "Enabled Custom Setting Definitions Access", "Enabled Flow Access", "Enabled Service Presence", and "Enabled Custom Permissions". Below the permissions list, the "Profile Detail" section shows the profile name "School Profile", user license "Salesforce", and a checkmark in the "Custom Profile" column. The "Description" field is empty. The "Created By" field shows "Chinthala Triveni" and the "Modified By" field shows "Chinthala Triveni".

Profile Detail

Name	School Profile
User License	Salesforce
Description	
Created By	Chinthala Triveni, 25/07/2023, 6:34 pm
Modified By	Chinthala Triveni, 28/07/2023, 10:50 am

6. Users:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

NOTE-

As Salesforce license can only be used by two Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user has salesforce license or change the license type from Salesforce to any other.

Here we create three users named Parents, Principals, and Teachers.

Creating a User:

SETUP Users

All Users [Help for ti](#)

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 | O | P | Q | R | S | T | U | V | W | X | Y | Z


<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000c9oruea3.h8aswcjydw@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Parents	pare	trivenichinthala357@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Principals	prin	triveni357@gmail.com		✓	School Profile
<input type="checkbox"/> Edit	Teachers	teac	trivenichinthala@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Triveni_Chinthala	CTriv	triveni032002@gdc.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5j00000c9oruea3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5j00000c9oruea3.com		✓	Analytics Cloud Security User

7. Permission Sets:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.


Here we created two permission sets called Teacher Permission and Parent Permission.

Permission Sets 1:

 **SETUP**
Permission Sets

Permission Set


Teacher permission

 [Clone](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview


Description	API Name	Teacher_permission
License	Namespace Prefix	
Session Activation Required	Created By	Chinthala Triveni, 26/07/2023, 11:35 ar
Last Modified By		Chinthala Triveni, 26/07/2023, 12:05 pm

Permissions Sets 2:

 **SETUP**
Permission Sets

Permission Set

Principal Permission

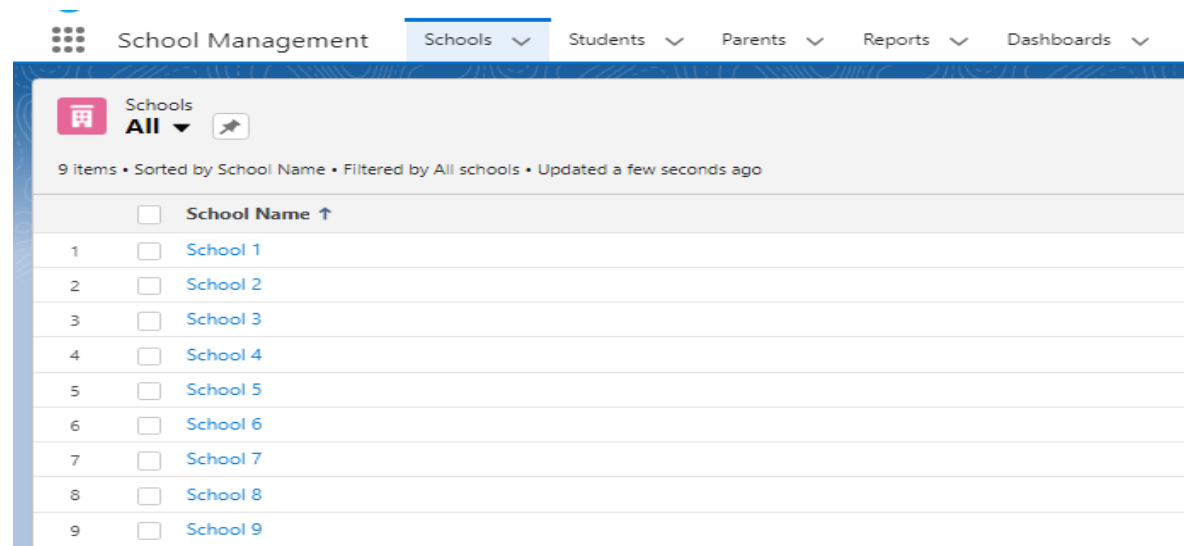
 [Clone](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview

Description	API Name	Principal_Permission
License	Namespace Prefix	
Session Activation Required	Created By	Chinthala Triveni, 26/07/2023, 12:13 pm
Last Modified By		Chinthala Triveni, 26/07/2023, 12:17 pm

8. User Adoption: Create, View & Delete Record

In User Adoption Milestone we create, view, and delete records inside the School Management Lightning App. Here we can create as many records as we want for school. We can customize these records accordingly

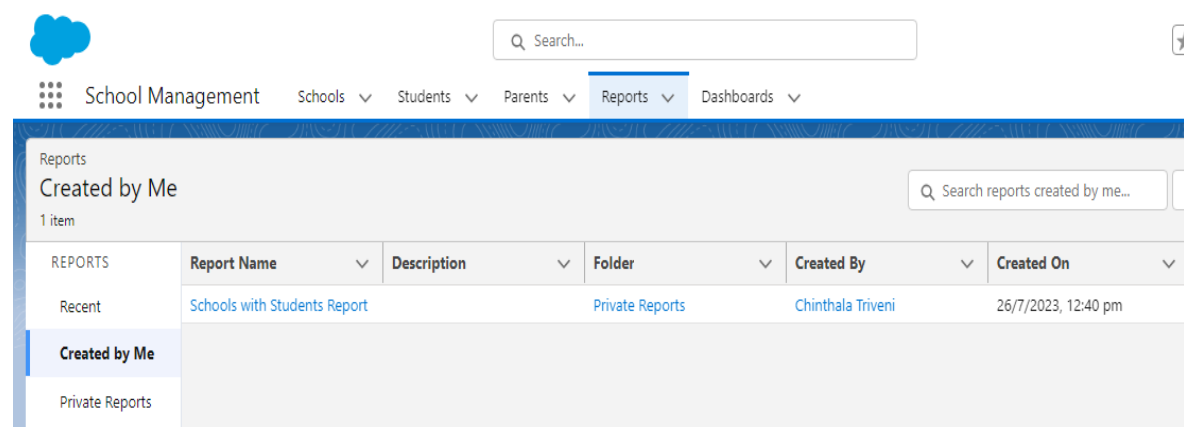


The screenshot shows the 'Schools' section of the 'School Management' app. The top navigation bar includes 'School Management', 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The 'Schools' section has a sub-header 'All' and a search icon. Below the header, it says '9 items • Sorted by School Name • Filtered by All schools • Updated a few seconds ago'. The main content is a table with 9 rows, each representing a school. Each row has a checkbox, a 'School Name' column, and an 'up' arrow icon.

	<input type="checkbox"/>	School Name ↑
1	<input type="checkbox"/>	School 1
2	<input type="checkbox"/>	School 2
3	<input type="checkbox"/>	School 3
4	<input type="checkbox"/>	School 4
5	<input type="checkbox"/>	School 5
6	<input type="checkbox"/>	School 6
7	<input type="checkbox"/>	School 7
8	<input type="checkbox"/>	School 8
9	<input type="checkbox"/>	School 9

9. Report: Create & View Report

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.




The screenshot shows the 'Reports' section of the Salesforce interface. The top navigation bar includes 'School Management', 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The 'Reports' section has a sub-header 'Created by Me' and a search icon. Below the header, it says '1 item'. The main content is a table with 6 columns: 'Report Name', 'Description', 'Folder', 'Created By', and 'Created On'. The table has 1 row with the following data: 'Schools with Students Report', 'Private Reports', 'Chinthala Triveni', and '26/7/2023, 12:40 pm'.

REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Schools with Students Report		Private Reports	Chinthala Triveni	26/7/2023, 12:40 pm

- From this milestone we are going to import the data and create the reports and dashboards for data visualization in the application.

Tabular Report:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.



School Management


Schools ▾

Students ▾

Parents ▾

Reports ▾

Dashboards ▾

 Report: Schools with Students

Schools with Students Report

Total Records
9

	School: School Name ▾	Student: Student Name ↑ ▾
1	School 1	Student 1
2	School 2	Student 2
3	School 3	Student 3
4	School 4	Student 4
5	School 5	Student 5
6	School 6	Student 6
7	School 7	Student 7
8	School 8	Student 8
9	School 9	Student 9