

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 work toward your badge for this module, we'll 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.

1.1 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 - Madhuri & Karra
 - b. Email - madhurikarra22@gmail.com
 - c. Role - Developer
 - d. Company - College Name - Gayatri Degree & PG College
 - e. Country - India
 - f. Postal Code - 517501
 - g. Username - madhuri2023@gdc.com

2. Objects – School, Student & Parent

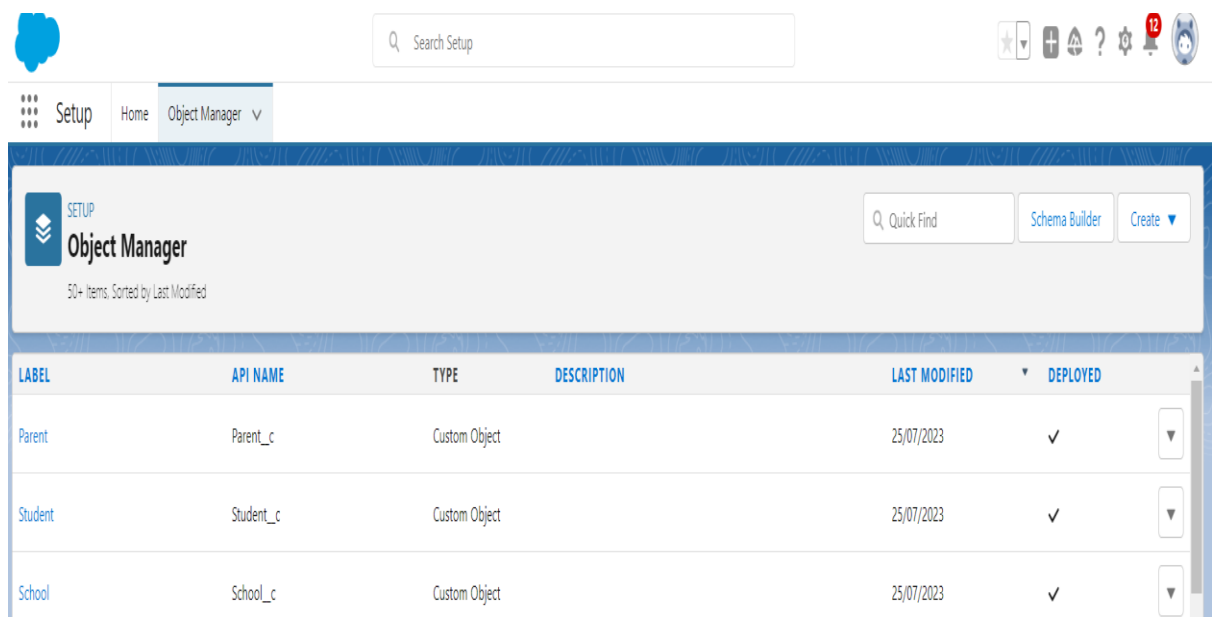
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

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- **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.

Creation of objects for School Management App

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

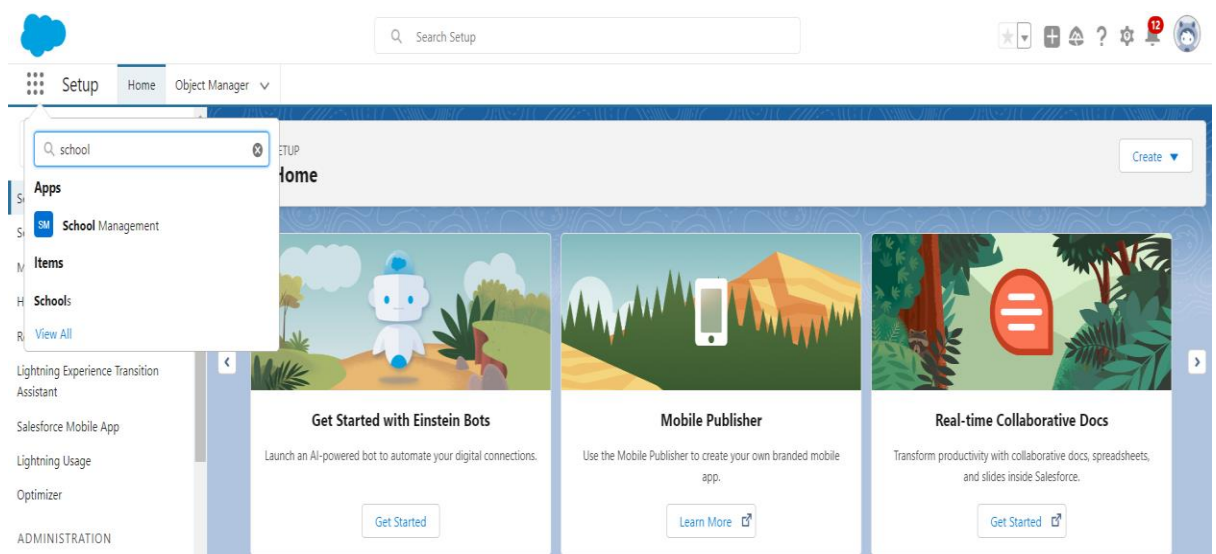


LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent_c	Custom Object		25/07/2023	✓
Student	Student_c	Custom Object		25/07/2023	✓
School	School_c	Custom Object		25/07/2023	✓

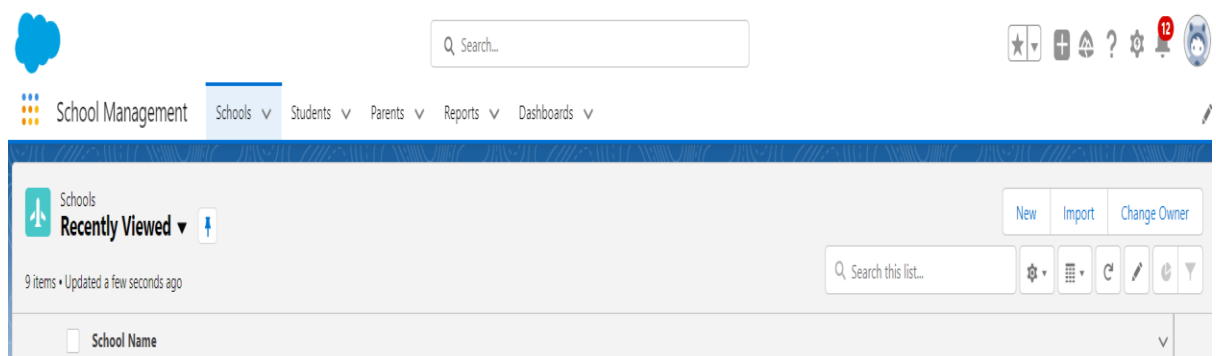
3. Lightning App:

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, Search School Management and Click on it
We can see the lightning app

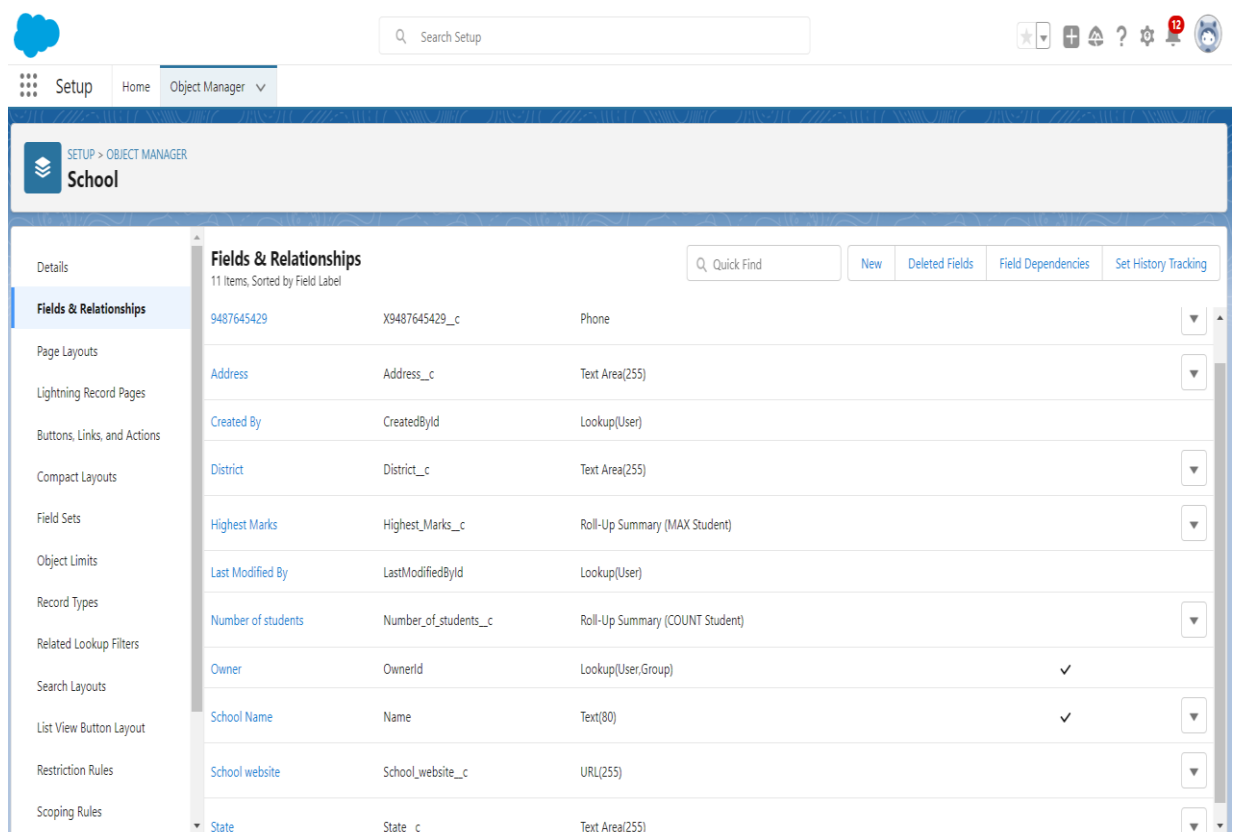


4. Fields And Relationships:

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 need to create Various Fields for School, Student & Parent Objects.

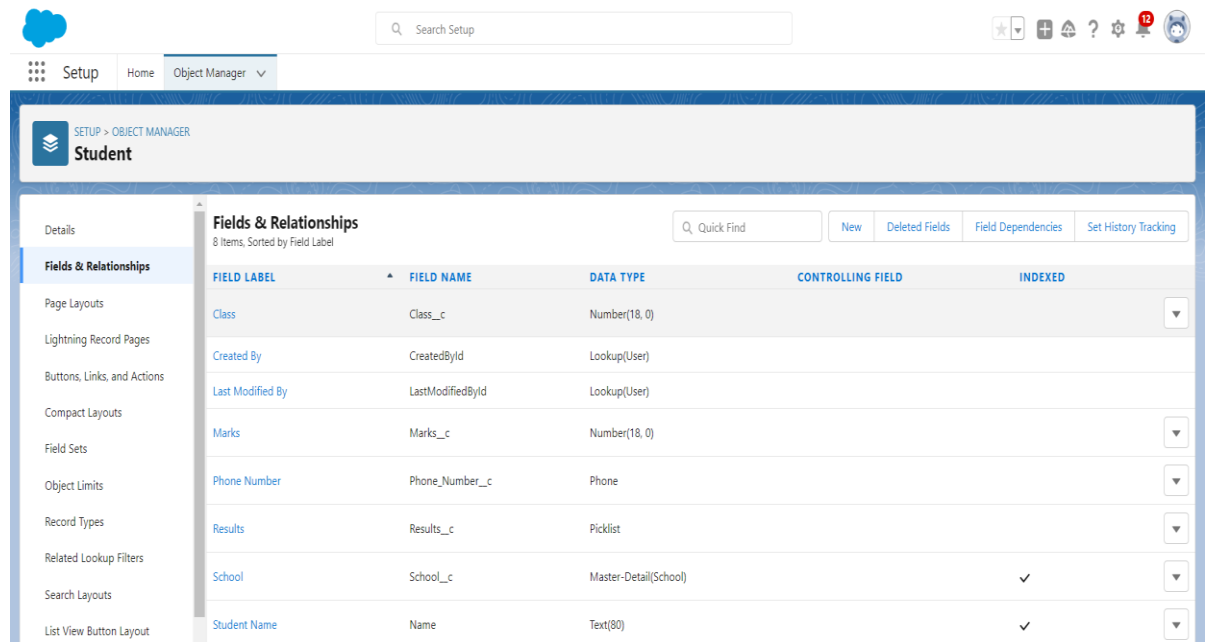
Creation of Fields for School Objects:



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 11 fields. The fields are sorted by label and include various data types and summary types. The 'Owner' field is marked with a checkmark, indicating it is the primary key.

Field Label	Field Name	Field Type	Summary Type	Checkmark
9487645429	X9487645429_c	Phone		
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)		✓
School Name	Name	Text(80)		✓
School website	School_website_c	URL(255)		
State	State_c	Text Area(255)		

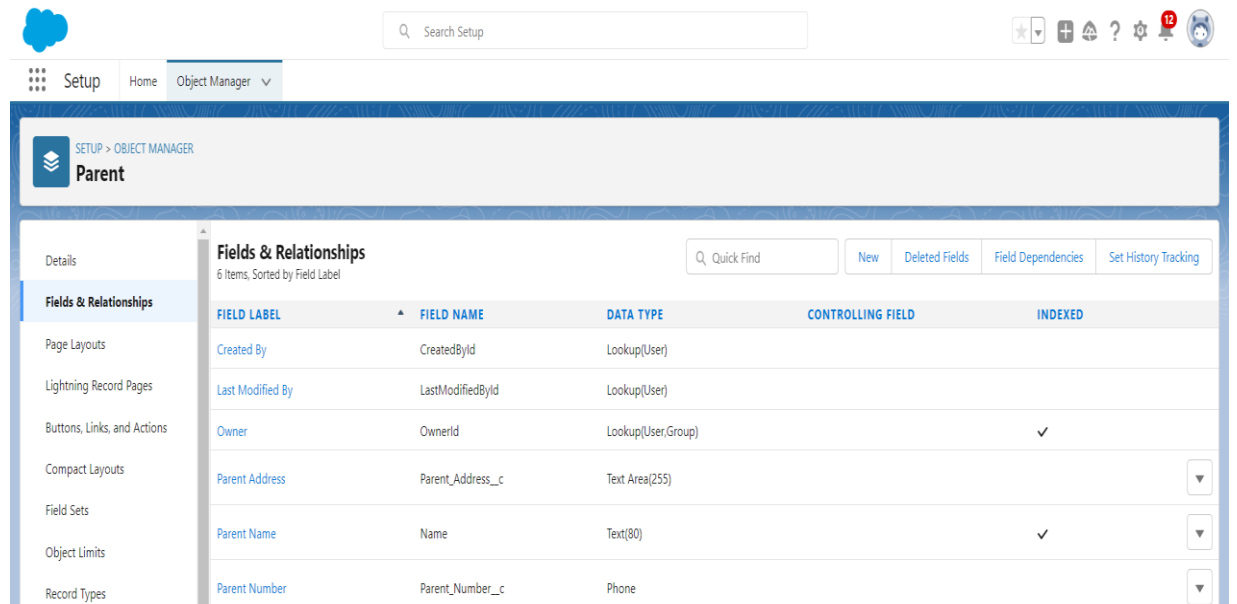
Creation of Fields for Student Objects:



The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Class, Created By, Last Modified By, Marks, Phone Number, Results, School, and Student Name. The 'Student Name' field is highlighted in blue.

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)		✓

Creation of Fields for Parent Objects



The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a table of 6 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Last Modified By, Owner, Parent Address, Parent Name, and Parent Number. The 'Parent Name' field is highlighted in blue.

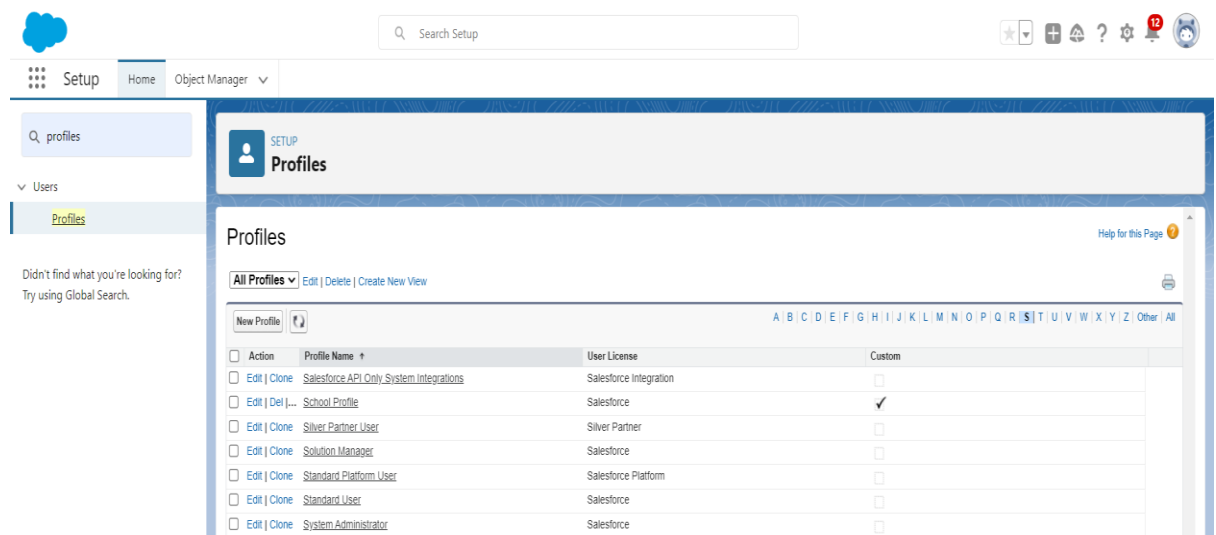
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

5. Profiles:

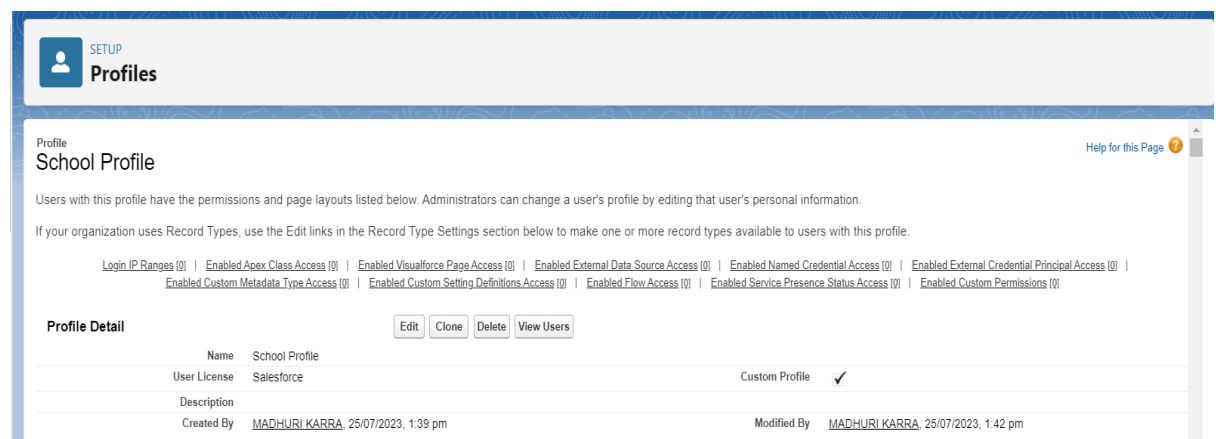
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

Here we are Creating a Profile named “School Profile” and giving access to all custom object permissions.

Creation on Profile:



Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Delete Clone	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"/>



Profile Detail

Name	School Profile
User License	Salesforce
Description	
Created By	MADHURI KARRA, 25/07/2023, 1:39 pm
Modified By	MADHURI KARRA, 25/07/2023, 1:42 pm

Permissions

Permission	Enabled
Login IP Ranges	<input type="checkbox"/>
Enabled Apex Class Access	<input type="checkbox"/>
Enabled Visualforce Page Access	<input type="checkbox"/>
Enabled External Data Source Access	<input type="checkbox"/>
Enabled Named Credential Access	<input type="checkbox"/>
Enabled External Credential Principal Access	<input type="checkbox"/>
Enabled Custom Metadata Type Access	<input type="checkbox"/>
Enabled Custom Setting Definitions Access	<input type="checkbox"/>
Enabled Flow Access	<input type="checkbox"/>
Enabled Service Presence Status Access	<input type="checkbox"/>
Enabled Custom Permissions	<input type="checkbox"/>

6. Users:

A user is anyone who logs in to Salesforce. Every user in Salesforce has a user account.

Note:

As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license or change the license type from Salesforce to any other

Here we Create three users – Parents, Principals and Teachers

Creating a User:

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Users' and includes a 'All Users' section. Below this, there is a table listing existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains several users, including Chatter Expert, KARBA MADHURI, Parents, principals, Teachers, User Integration, and User Security. The 'Active' column shows checkboxes for each user, and the 'Profile' column lists the assigned profile for each user.

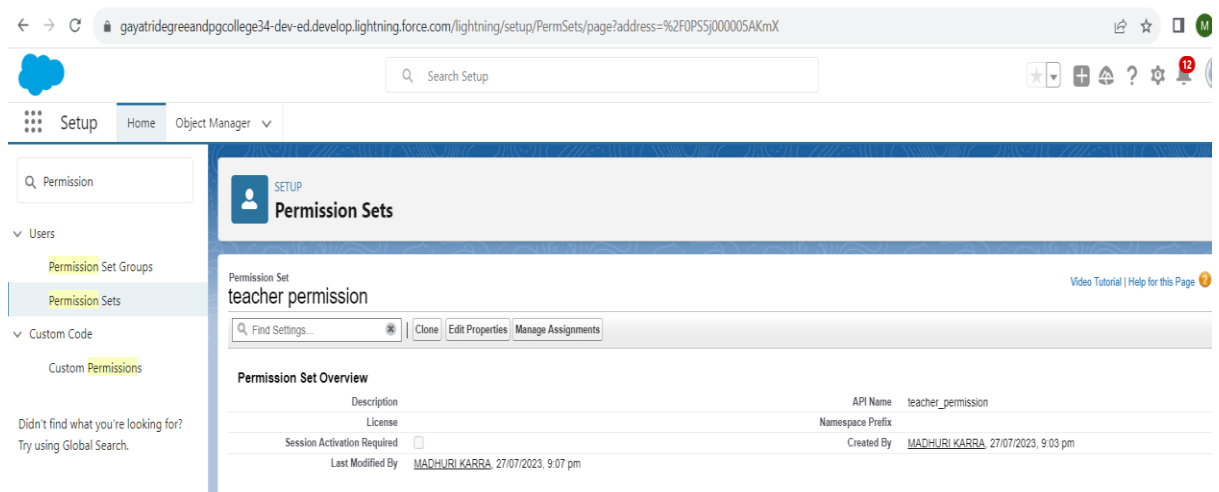
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d5f00000c9ogkean.guodj7i9gwh@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	KARBA MADHURI	MKARB	madhuri2023@gdc.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Parents	pare	parents44@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	principals	prin	principal48@gmail.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Teachers	teac	teachers46@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5f00000c9ogkean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5f00000c9ogkean.com		<input checked="" type="checkbox"/>	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 which are Teacher Permission and Parent Permission

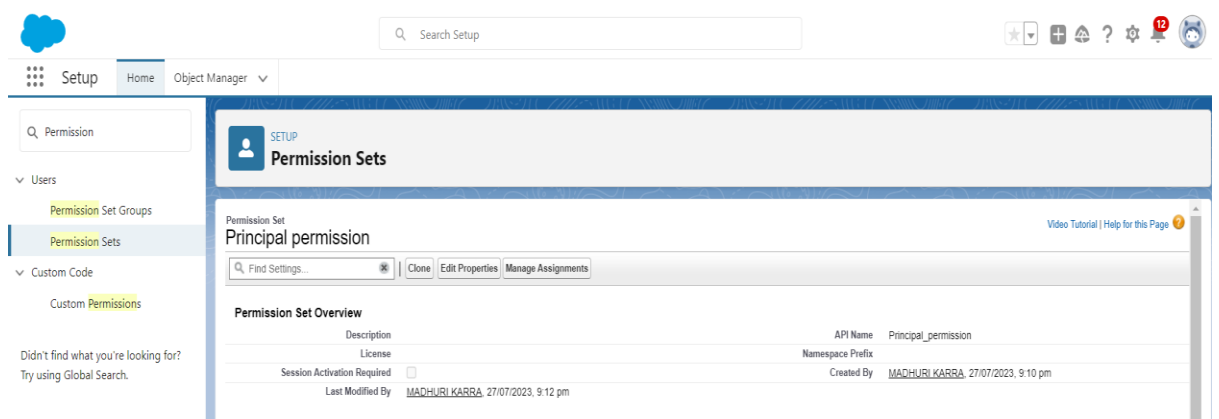
Permission sets 1:



The screenshot shows the Salesforce Setup interface for a permission set named 'teacher permission'. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the 'teacher permission' overview, including a search bar, 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. The 'Permission Set Overview' table shows the following details:

Permission Set Overview	
Description	teacher_permission
License	API Name
Session Activation Required	Namespace Prefix
Last Modified By	Created By
MADHURI KARBA	MADHURI KARBA
27/07/2023, 9:07 pm	27/07/2023, 9:03 pm

Permission Sets 2:

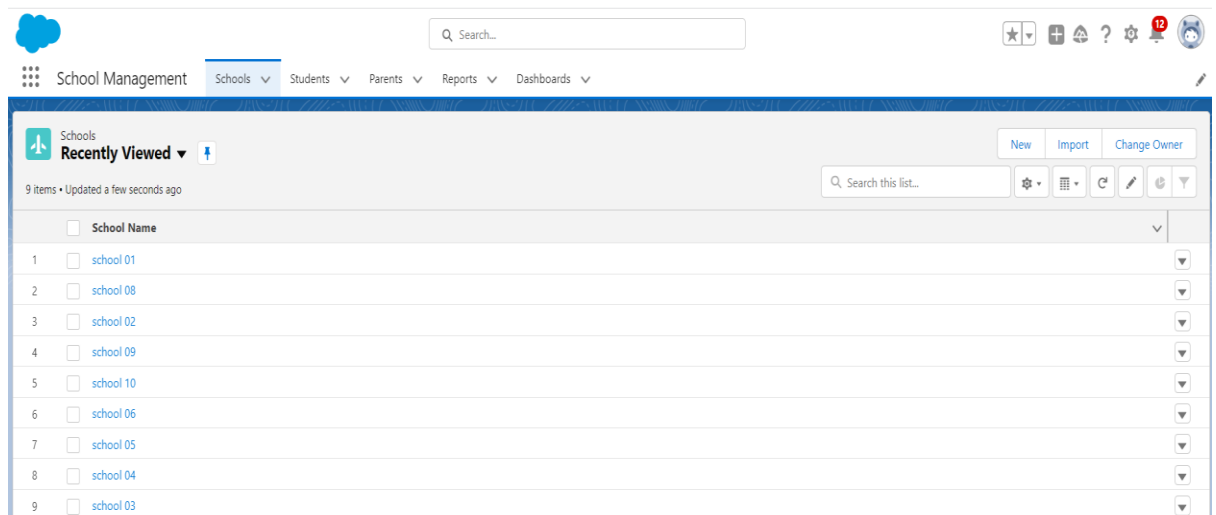


The screenshot shows the Salesforce Setup interface for a permission set named 'Principal permission'. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the 'Principal permission' overview, including a search bar, 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. The 'Permission Set Overview' table shows the following details:

Permission Set Overview	
Description	Principal_permission
License	API Name
Session Activation Required	Namespace Prefix
Last Modified By	Created By
MADHURI KARBA	MADHURI KARBA
27/07/2023, 9:12 pm	27/07/2023, 9:10 pm

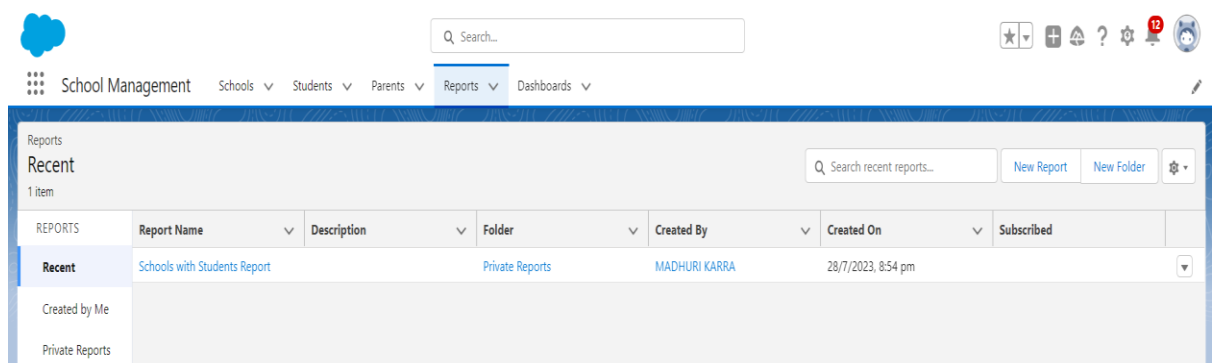
8. User Adoption: Create, View & Delete Record

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 Customise these records accordingly.



9. Reports: Create & View Report

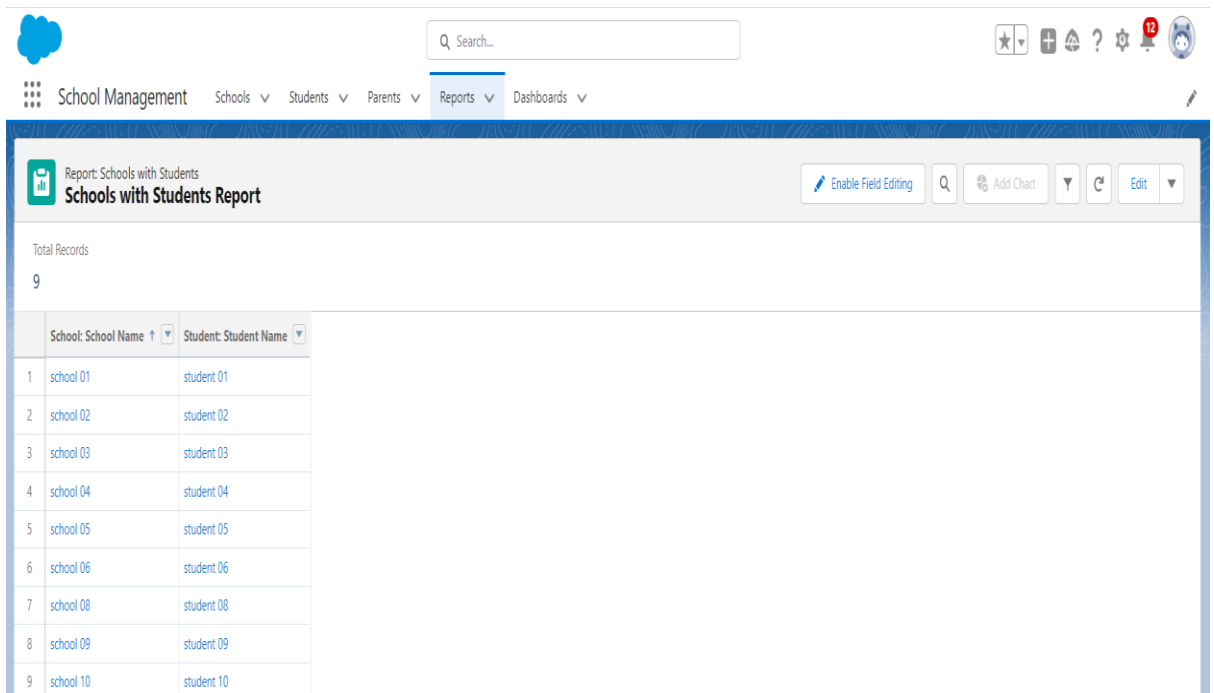
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.



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

Tabular Report:

This is the basic report format. It just displays the records which we have created during this project. 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 grand total.



The screenshot shows a web application interface. At the top, there is a navigation bar with a logo on the left, a search bar in the center, and several icons on the right. Below the navigation bar is a menu with items: 'School Management', 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The 'Reports' item is currently selected. Below the menu, there is a report header area with a title 'Report: Schools with Students' and 'Schools with Students Report'. To the right of the title are buttons for 'Enable Field Editing', a search icon, 'Add Chart', a refresh icon, and an 'Edit' button. Below the header, there is a section for 'Total Records' showing the number '9'. The main content area is a table with two columns: 'School: School Name' and 'Student: Student Name'. The table contains 10 rows of data, numbered 1 to 10 in the first column. The second column contains the corresponding school and student names.

	School: School Name ↑	Student: Student Name ↓
1	school 01	student 01
2	school 02	student 02
3	school 03	student 03
4	school 04	student 04
5	school 05	student 05
6	school 06	student 06
7	school 08	student 08
8	school 09	student 09
9	school 10	student 10