

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:

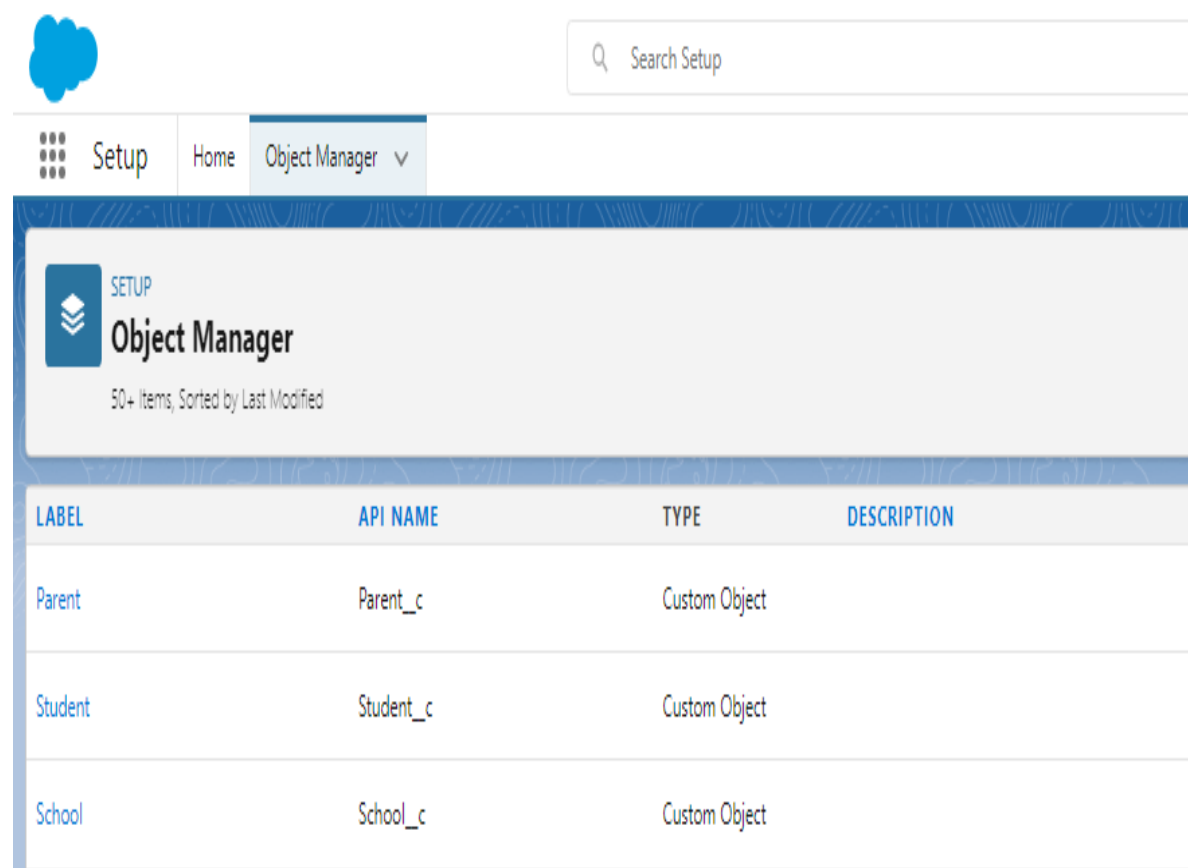
- Go to developer.salesforce.com
- Click on sign up.
- On the sign-up form, enter the following details
 - a. First name & Last name - Sowmya & Sunkara
 - b. Email - sowmyasunkara7933@gmail.com
 - c. Role - Developer
 - d. Company - Gayatri Degree College -Tirupati
 - e. Country - India
 - f. Postal Code - 517501
 - g. Username - sowmya2003@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.



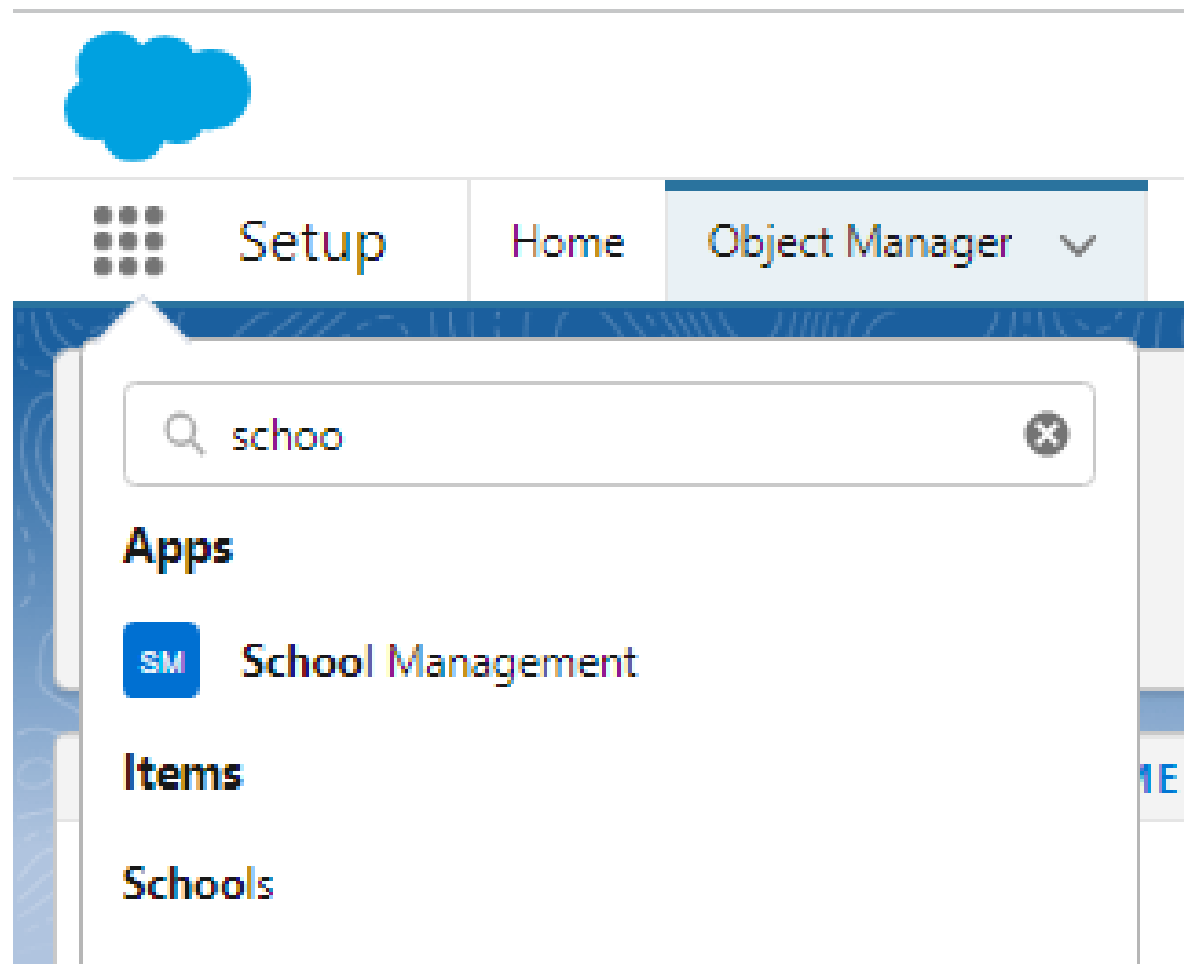
The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager" (which is selected). The main content area is titled "Object Manager" with a sub-header "50+ Items, Sorted by Last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

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

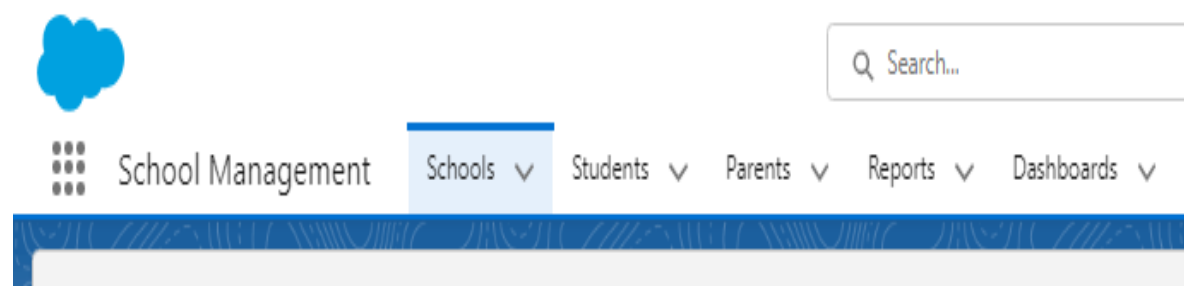
3. Lightning app:

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.

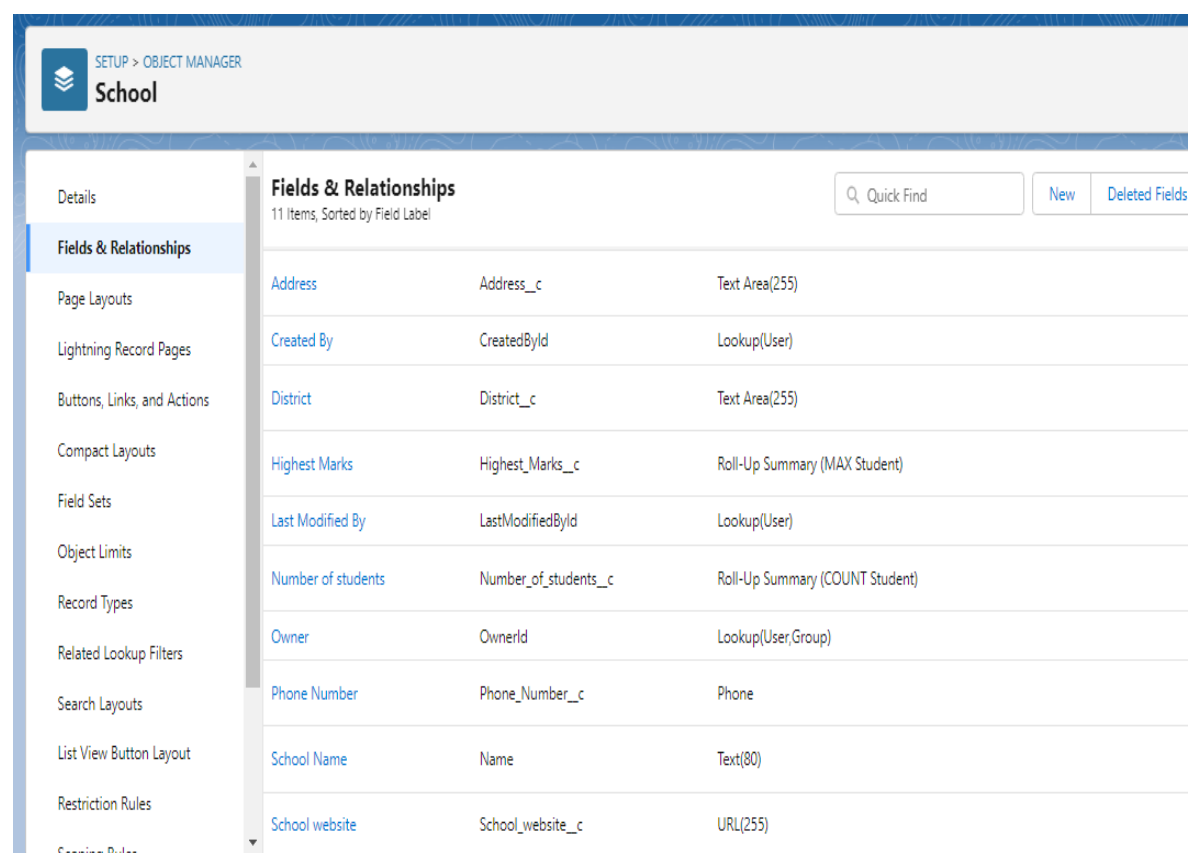


4. Fields and Relationships:

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.

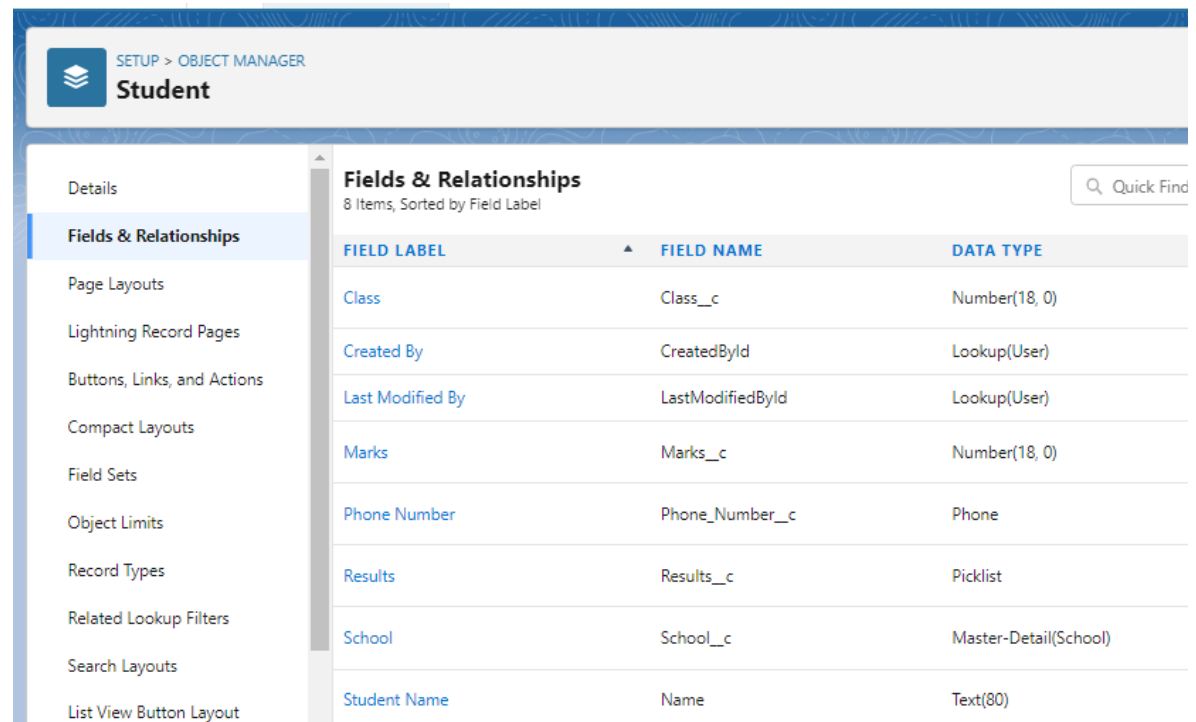
Creation of Fields for the School objects:



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 and their data types.

Field Label	Field Name	Data 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

Quick Find

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)

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

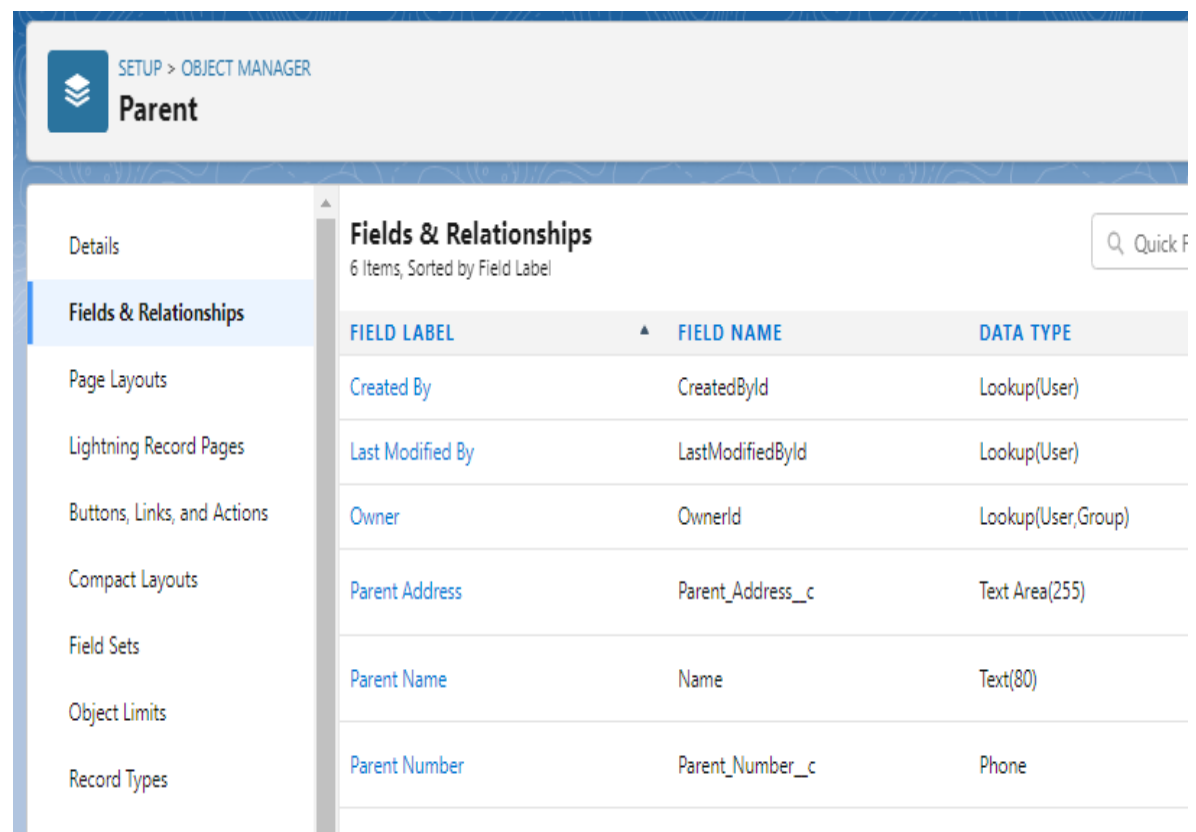
Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Creation of Fields for the Parent Objects:



SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships
6 Items, Sorted by Field Label

Quick Find

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

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

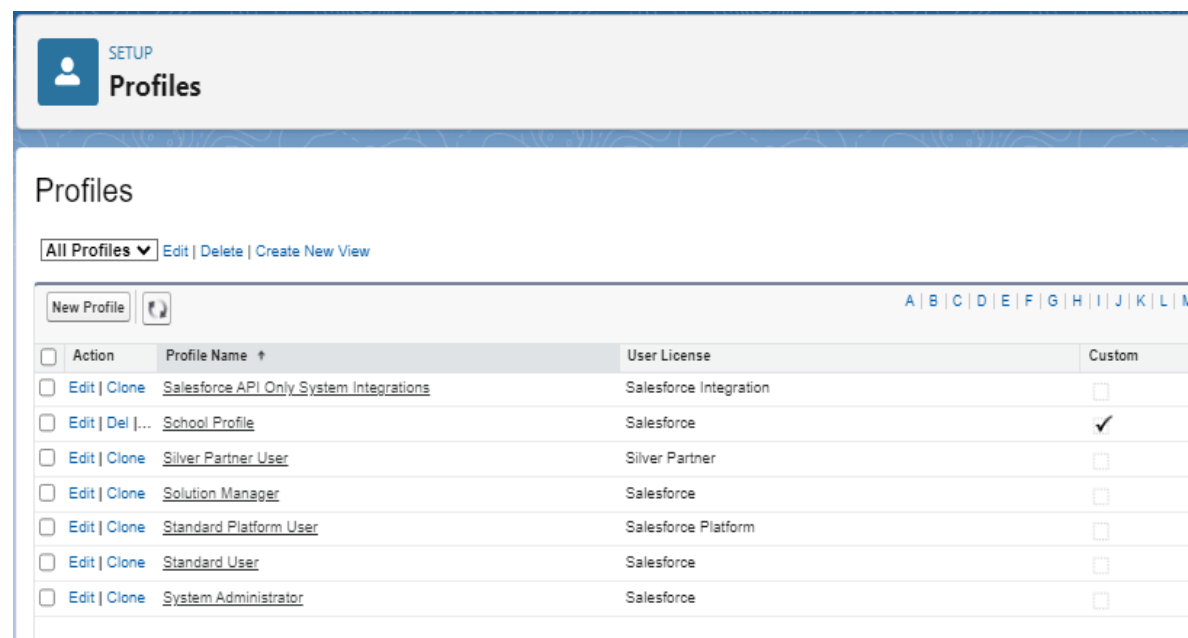
Record Types

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:



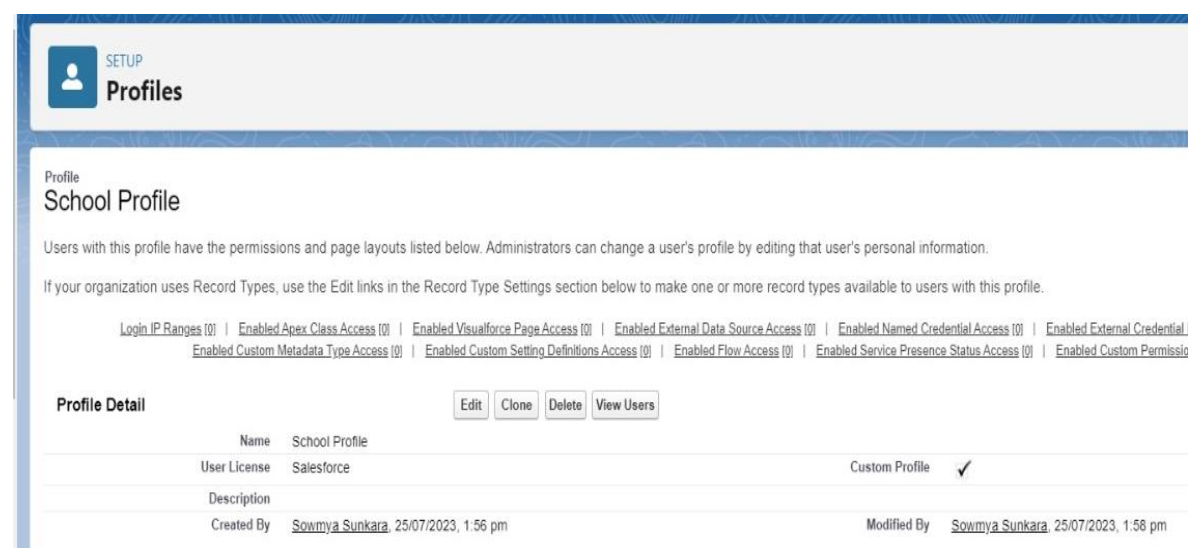
SETUP Profiles

Profiles

[All Profiles](#) [Edit](#) [Delete](#) [Create New View](#)

[New Profile](#) [Help](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#)

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



SETUP Profiles

Profile
School Profile

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.

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.

[Login IP Ranges](#) [Enabled Apex Class Access](#) [Enabled Visualforce Page Access](#) [Enabled External Data Source Access](#) [Enabled Named Credential Access](#) [Enabled External Credential](#) [Enabled Custom Metadata Type Access](#) [Enabled Custom Setting Definitions Access](#) [Enabled Flow Access](#) [Enabled Service Presence Status Access](#) [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	School Profile
User License	Salesforce
Description	
Created By	Sowmya Sunkara , 25/07/2023, 1:56 pm
Modified By	Sowmya Sunkara , 25/07/2023, 1:58 pm

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

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](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000c9ogcea3.lwcnzqbdb3u@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Parents	pare	sowmyasunkara7933@gmail.comuser16902910168702131390		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	principals	prin	sowmya33@gmail.comuser16903482062774015864		✓	School Profile
<input type="checkbox"/> Edit	Sunkara_Sowmya	SSunk	sowmya2003@gdc.com		✓	System Administrator
<input type="checkbox"/> Edit	Teachers	teac	sowmya33@gmail.comuser16903480516072588506		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5j00000c9ogcea3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5j00000c9ogcea3.com		✓	Analytics Cloud Security User

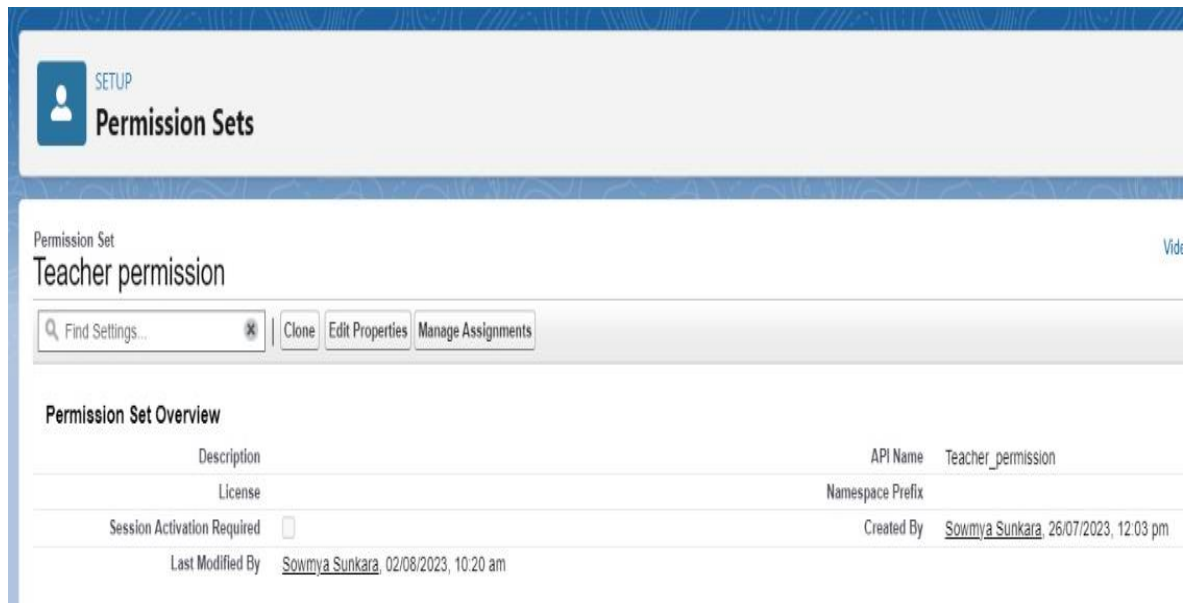
[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

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:



The screenshot shows the 'Teacher permission' Permission Set Overview in the Salesforce Setup interface. The page has a blue header with a 'SETUP' icon and the title 'Permission Sets'. Below the header, the 'Permission Set' is identified as 'Teacher permission'. A search bar labeled 'Find Settings...' and three buttons ('Clone', 'Edit Properties', 'Manage Assignments') are visible. The 'Permission Set Overview' section contains a table with the following data:

Description	API Name
Teacher permission	Teacher_permission
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By Sowmya Sunkara, 26/07/2023, 12:03 pm
Last Modified By Sowmya Sunkara, 02/08/2023, 10:20 am	

Permissions Sets 2:

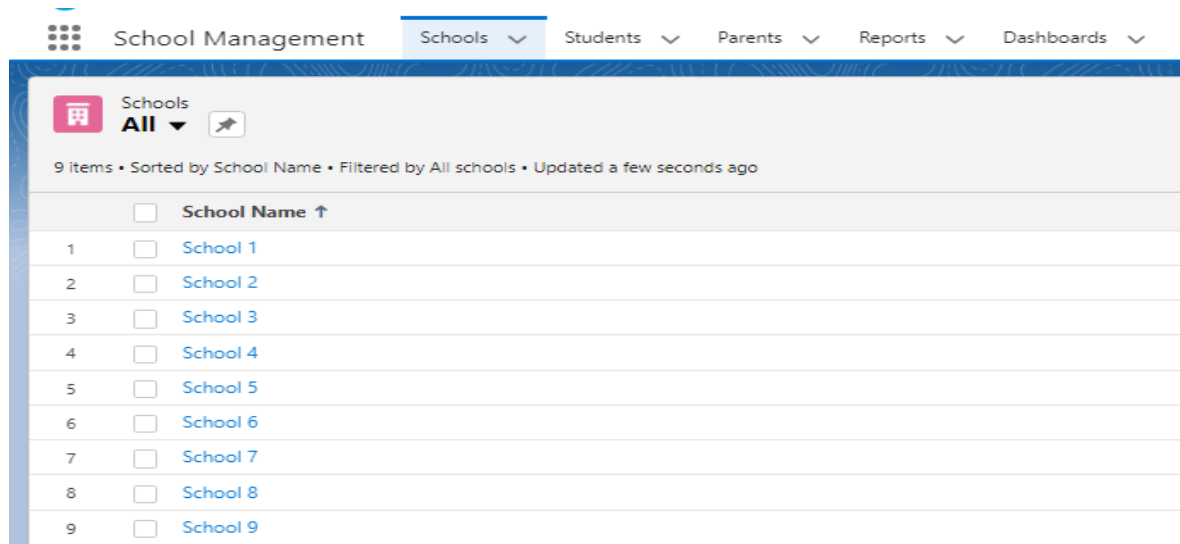


The screenshot shows the 'Principal permission' Permission Set Overview in the Salesforce Setup interface. The page has a blue header with a 'SETUP' icon and the title 'Permission Sets'. Below the header, the 'Permission Set' is identified as 'Principal permission'. A search bar labeled 'Find Settings...' and three buttons ('Clone', 'Edit Properties', 'Manage Assignments') are visible. The 'Permission Set Overview' section contains a table with the following data:

Description	API Name
Principal permission	Principal_permission
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By Sowmya Sunkara, 26/07/2023, 12:18 pm
Last Modified By Sowmya Sunkara, 26/07/2023, 12:22 pm	

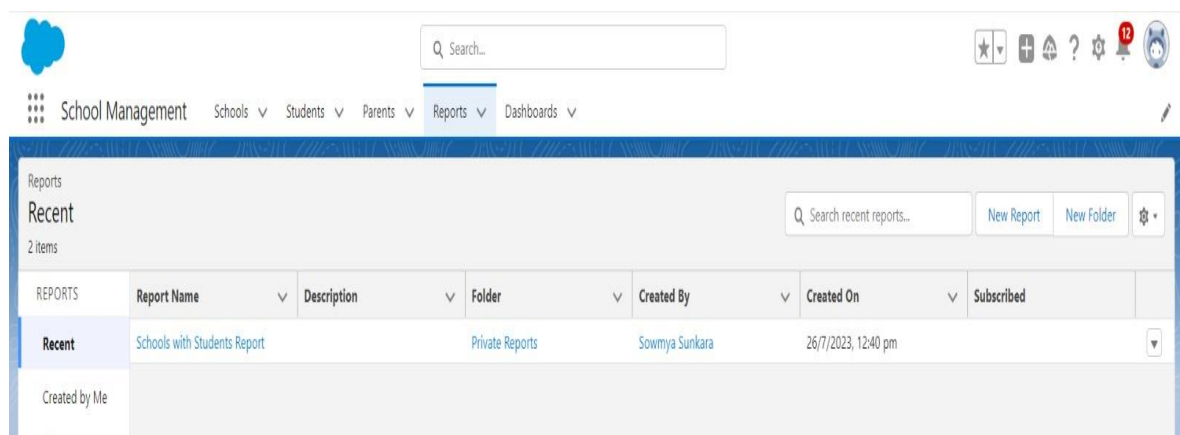
8. User Adoption: Create, View & Delete Record

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



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.



- 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