

# Project Report

## **Creation of An Application for School Management – Admin**

- 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](https://developer.salesforce.com)
- Click on sign up.
- On the sign - up form, enter the following details

- a. First name & Last name     -     Reshma & Dasari
- b. Email                                 -     resh6141@gmail.com
- c. Role                                     -     Developer
- d. Company - College Name     -     Gayatri Degree & PG College
- e. Country                               -     India
- f. Postal Code                         -     517583
- g. Username                           -     reshma2023@gdc.com

- 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

Object Manager

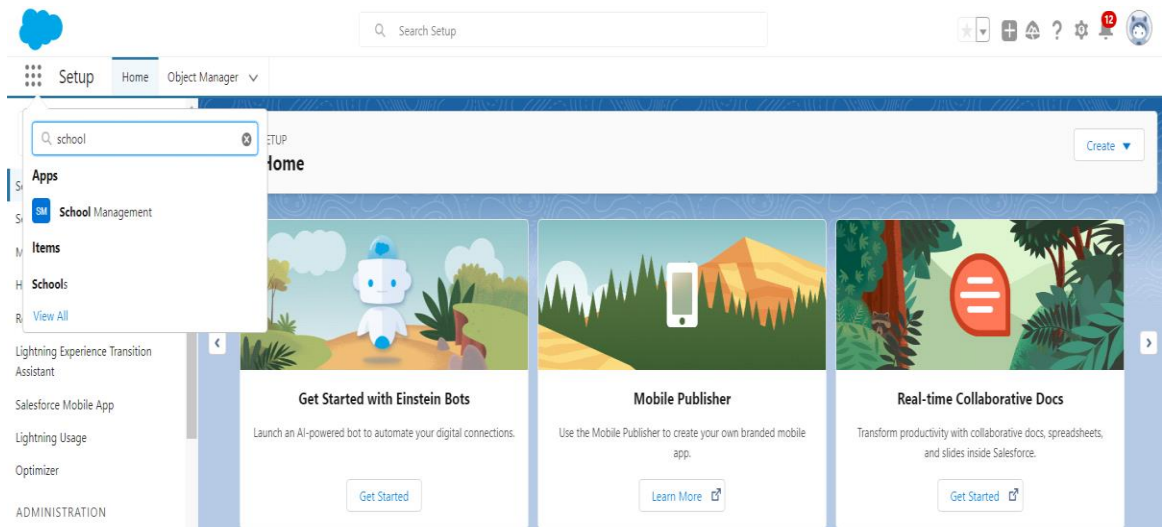
50+ Items, Sorted by Last Modified

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	✓

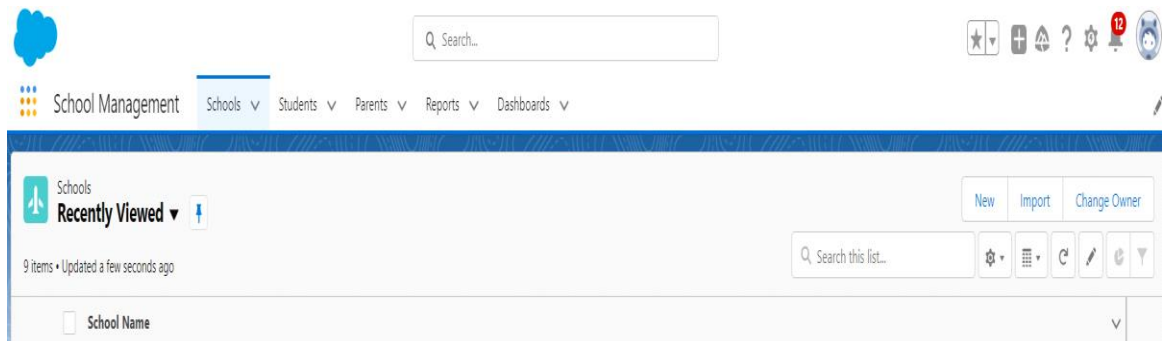
- **Lightning App:**

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



- 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.

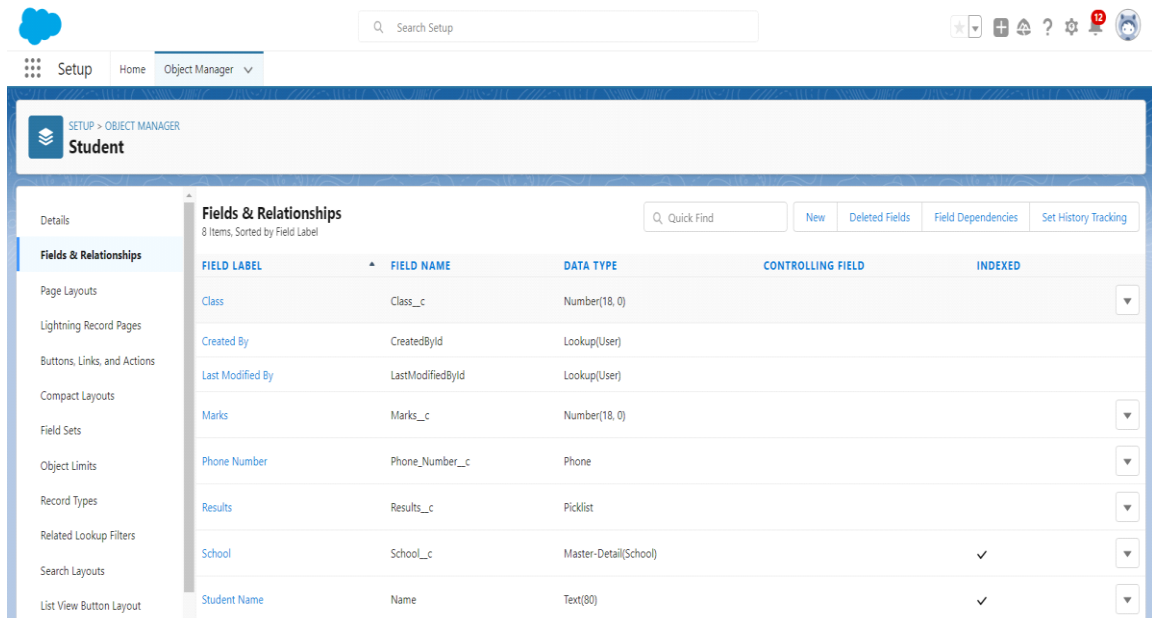
Here we need to create Various Fields for School, Student & Parent Objects.

### 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 a 'Quick Find' search bar. The fields are as follows:

Field Label	Field Name	Field Type	Field Properties
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:



Setup > OBJECT MANAGER  
**Student**

Details

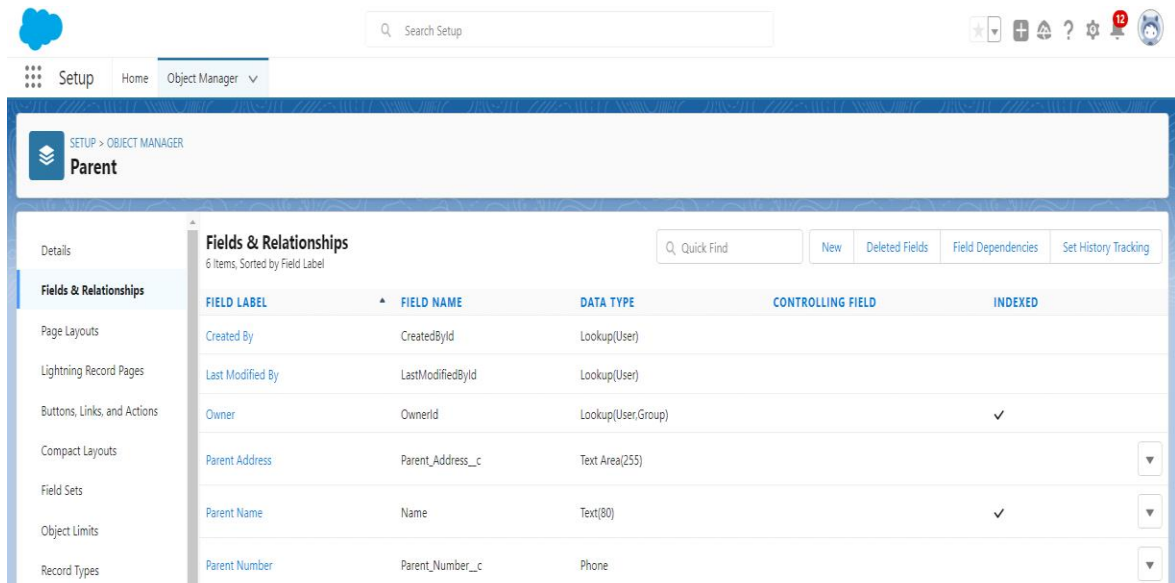
**Fields & Relationships**  
8 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

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 Parent Objects



Setup > OBJECT MANAGER  
**Parent**

Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

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		

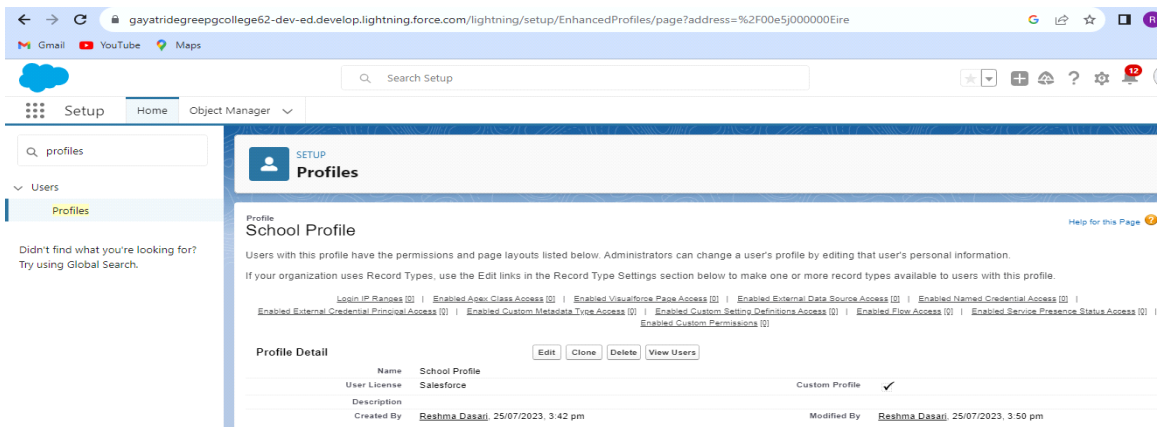
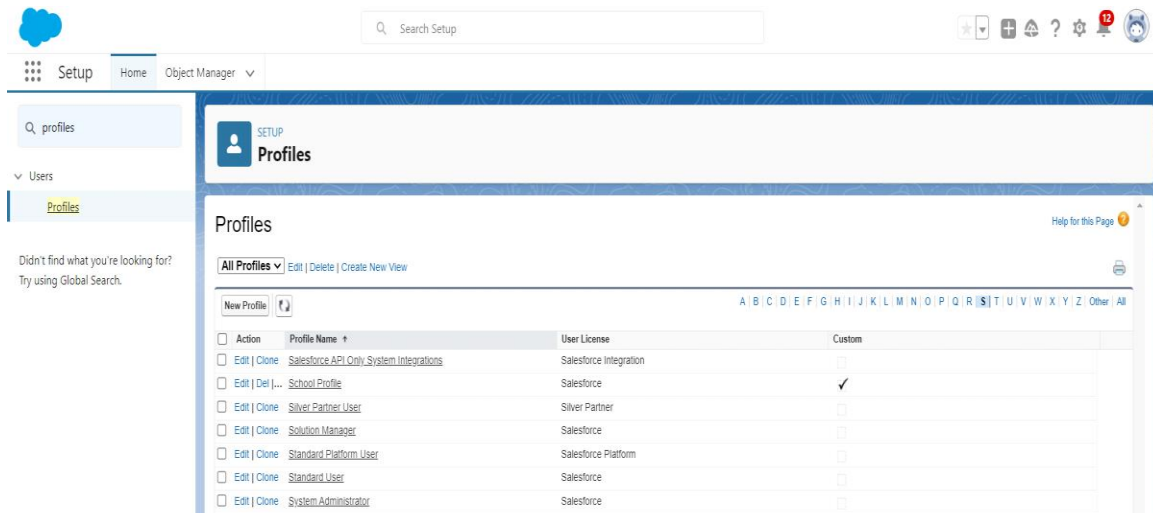
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types

- **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:



- Users:

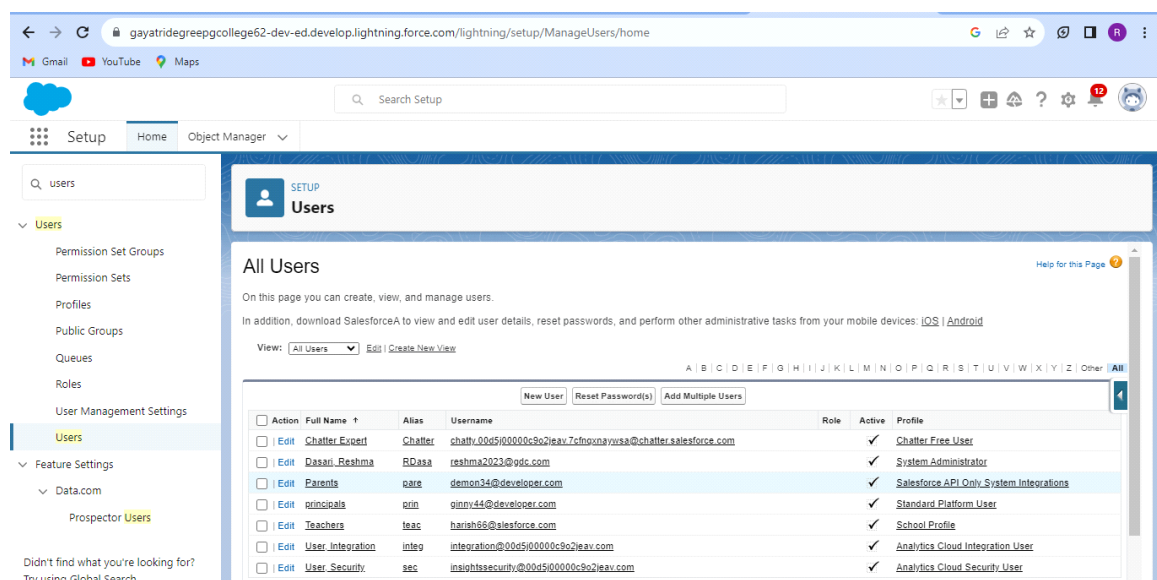
A user is anyone who logs in to Salesforce. Every user in Salesforce has a user account.

## 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 page for managing users. The left sidebar contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a 'Create New User' button. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including Chatter, Datan, Parents, Principals, Teachers, User Integration, and User Security.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d5f0000c802eav7cfnounavusa@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Datan Reshma	BDatan	reshma2023@gdc.com		✓	System Administrator
<input type="checkbox"/> Edit	Parents	pare	dkmon34@developer.com		✓	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	Principals	prin	ginnv44@developer.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Teachers	teac	harish88@salesforce.com		✓	School Profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5f0000c802eav.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d5f0000c802eav.com		✓	Analytics Cloud Security User

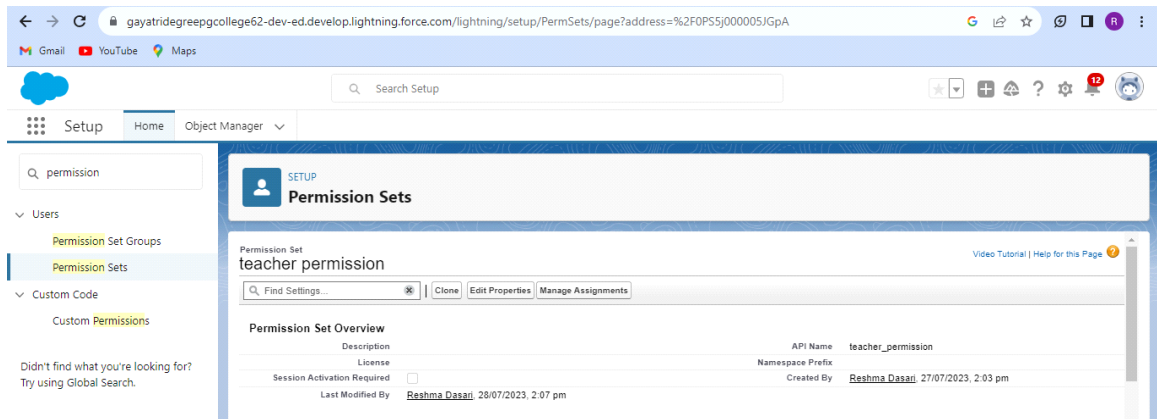
## Permission Sets:

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.

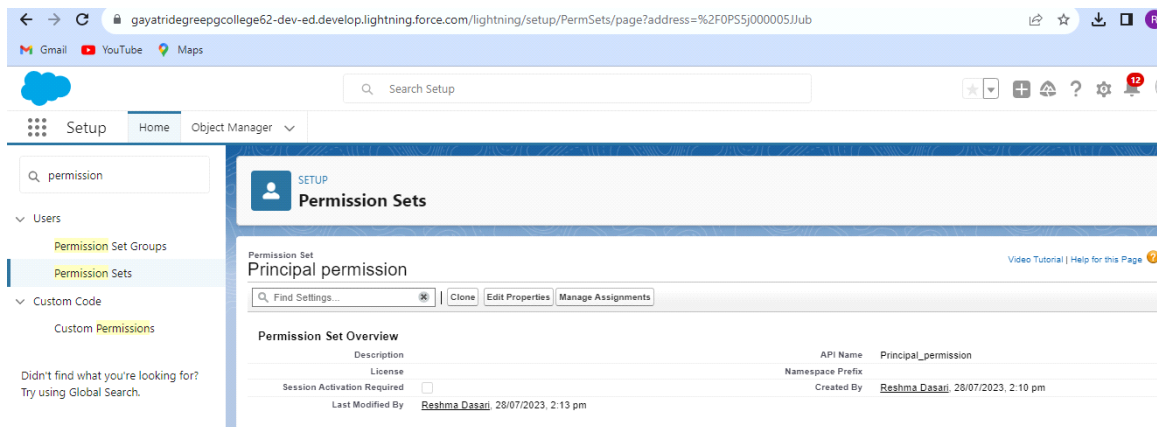
Here we Created two permission sets which are Teacher Permission and Parent Permission

## Permission sets 1:





## Permission Sets 2:



- 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.

The screenshot shows the Salesforce 'School Management' interface. The 'Schools' tab is selected, and the 'Recently Viewed' filter is applied. A table lists 9 schools, each with a checkbox, a name, and a dropdown arrow.

	<input type="checkbox"/> School Name	
1	<input type="checkbox"/> school 01	▼
2	<input type="checkbox"/> school 08	▼
3	<input type="checkbox"/> school 02	▼
4	<input type="checkbox"/> school 09	▼
5	<input type="checkbox"/> school 10	▼
6	<input type="checkbox"/> school 06	▼
7	<input type="checkbox"/> school 05	▼
8	<input type="checkbox"/> school 04	▼
9	<input type="checkbox"/> school 03	▼

- 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.

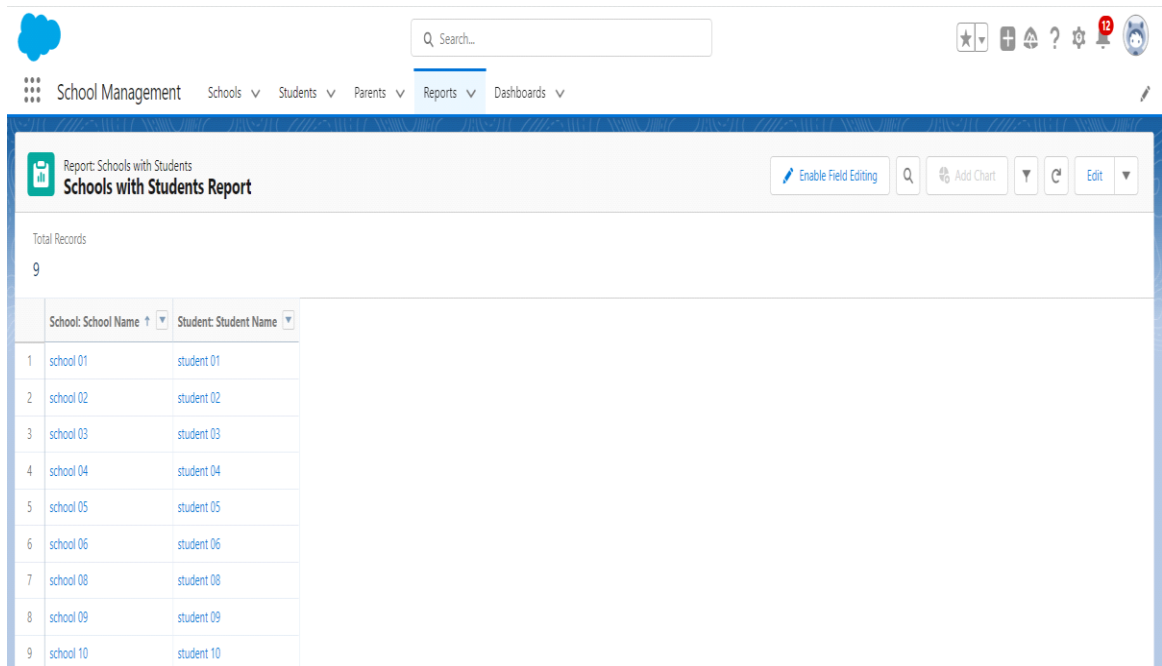
The screenshot shows the Salesforce 'Reports' interface. The 'Recent' filter is applied, showing a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. A sidebar on the left shows 'Recent', 'Created by Me', and 'Private Reports'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Schools with Students Report		Private Reports	Reshma Dasari	28/7/2023, 2:58 pm	▼

- 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 for 'School Management'. The top navigation bar includes a search bar, a user profile icon, and a notification badge with the number '12'. The main menu has options for 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The 'Reports' section is active, displaying a report titled 'Report: Schools with Students' and 'Schools with Students Report'. The report shows a total of 9 records. Below the total, there is a table with two columns: 'School: School Name' and 'Student: Student Name'. The table contains 9 rows of data, numbered 1 through 9.

	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