

PROJECT REPORT ON

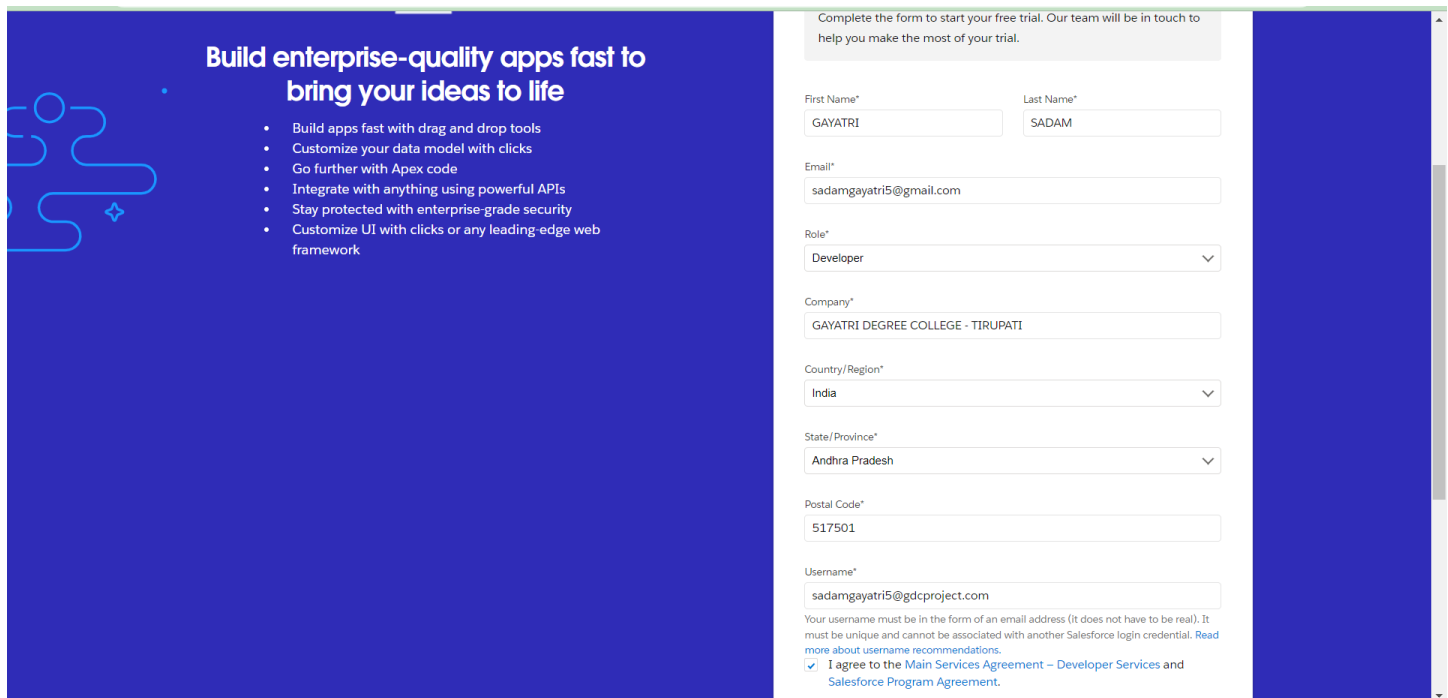
Creation Of An Application For School Management

Introduction:

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.

Milestone 01 - Creating Developer Org

- Go to developer.salesforce.com
 - ❖ Click on sign up.
 - ❖ On the sign up form enter the following details
 - ❖ First name & Last name – GAYATHRI & SADAM
 - ❖ Email – sadamgayatri5@gmail.com
 - ❖ Role – SALESFORCE DEVELOPER
 - ❖ Company – GAYATRI DEGREE COLLEGE – TIRUPATI
 - ❖ Country - India
 - ❖ Postal Code – pin code 517501
 - ❖ Username – sadamgayatri5@gdcproject.com



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First Name* GAYATHRI Last Name* SADAM

Email* sadamgayatri5@gmail.com

Role* Developer

Company* GAYATRI DEGREE COLLEGE - TIRUPATI

Country/Region* India

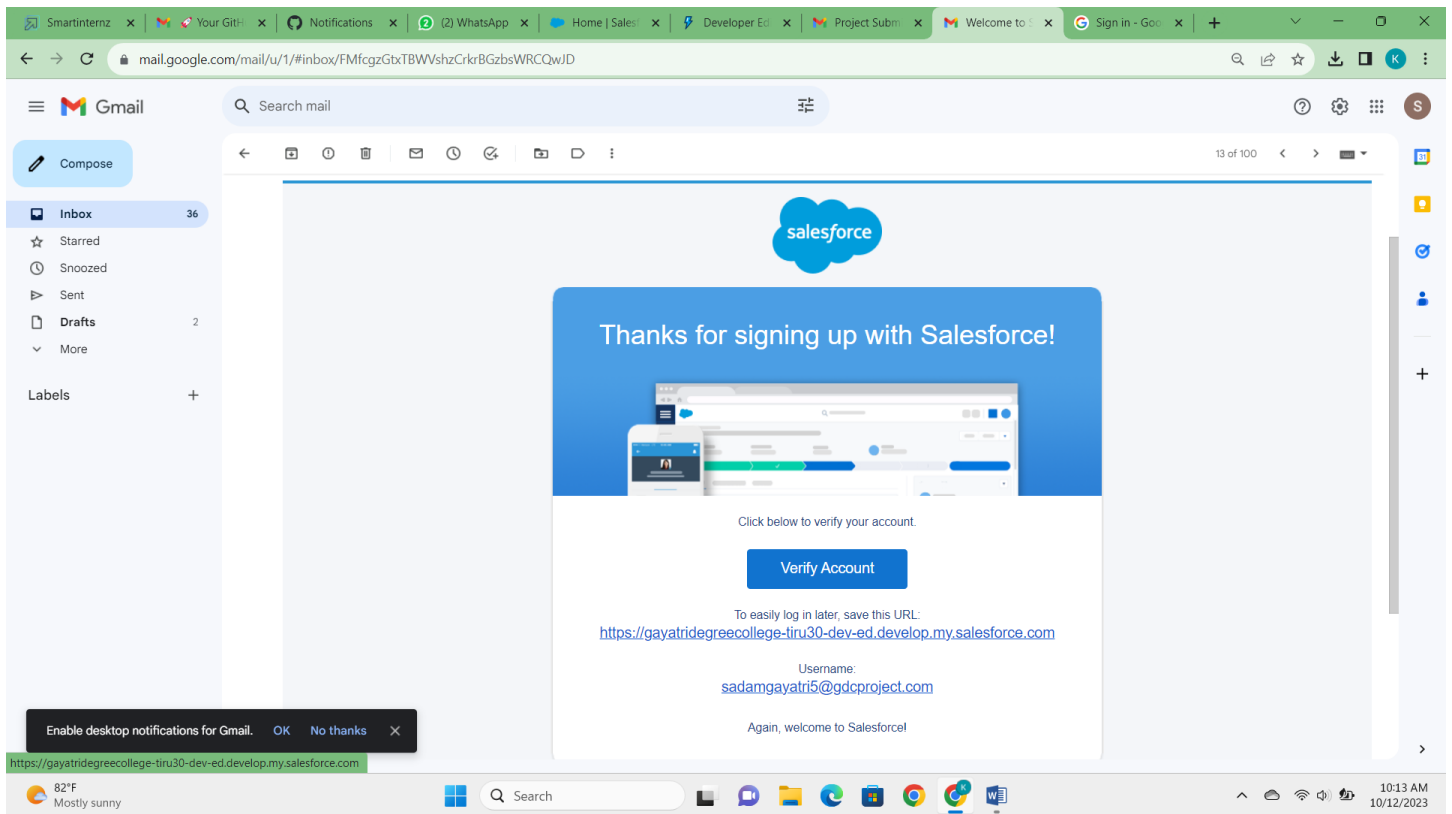
State/Province* Andhra Pradesh

Postal Code* 517501

Username* sadamgayatri5@gdcproject.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.



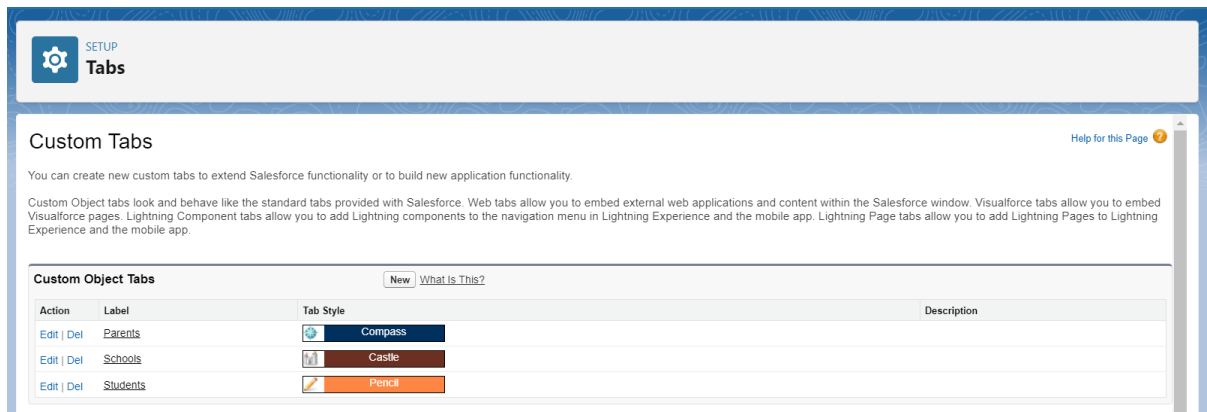
Milestone 02 – Creation of Object

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:** School, Student, Parent.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		07/10/2023	✓
Student	Student__c	Custom Object		07/10/2023	✓
School	School__c	Custom Object		07/10/2023	✓

➤ **Custom Tabs:** School, student, Parent.

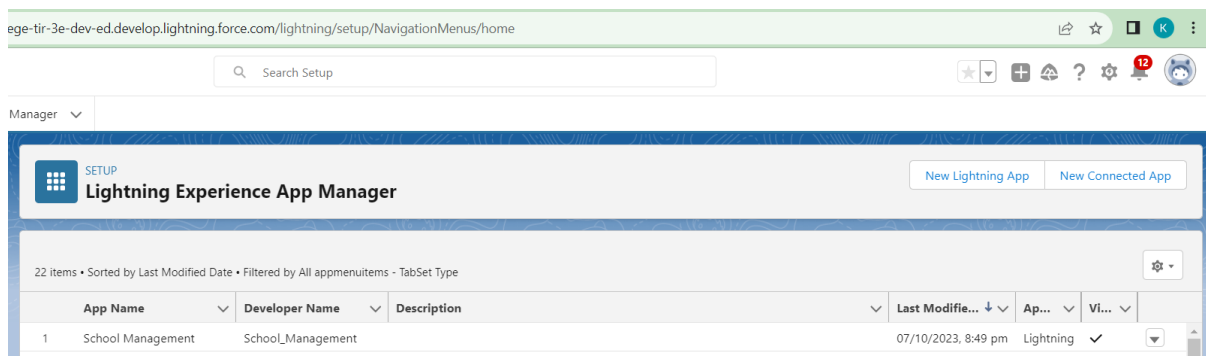


Milestone 03 - Lightning App

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.

➤ 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.



Milestone 04 – Fields And Relationship

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.

➤ Fields in School Object:

Setup Home Object Manager

SETUP > OBJECT MANAGER
School

Details

Fields & Relationships
11 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
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text(50)		
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)		
State	State__c	Text(50)		

➤ Fields in Student Object:

Setup Home Object Manager

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships
9 Items. Sorted by Field Label

Q Search Setup

Star Add Refresh Help Settings 12 Profile

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
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)		✓

➤ Fields in Parent object:

The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Parent' object. The 'Fields & Relationships' tab is selected, displaying a list of 6 fields sorted by Field Label. The fields are:

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		

Milestone 05 – Profile

➤ Creation On Profile

1. From Setup enter Profiles in the Quick Find box
2. Select Profiles.
3. Click new, From the list of profiles, find Standard User (profile to clone)
4. For Profile Name, enter School Profile
5. Click Save.
6. While still on the School profile page, then click Edit.
7. Scroll down to Custom Object Permissions and Give view all access permissions.

The screenshot shows the Salesforce Setup interface, specifically the 'Profiles' section. The 'School Profile' is selected, and the 'Profile Detail' section is visible. The profile is named 'School Profile' and is a 'Custom Profile'. The 'Page Layouts' section shows the following assignments:

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Account	DE Default [View Assignment]	Opportunity Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Opportunity Product Layout [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Order Layout [View Assignment]
	Appointment Invitation Layout [View Assignment]	Order Product Layout [View Assignment]

Milestone 06 – Users

➤ Creating A User

❖ User - Parent

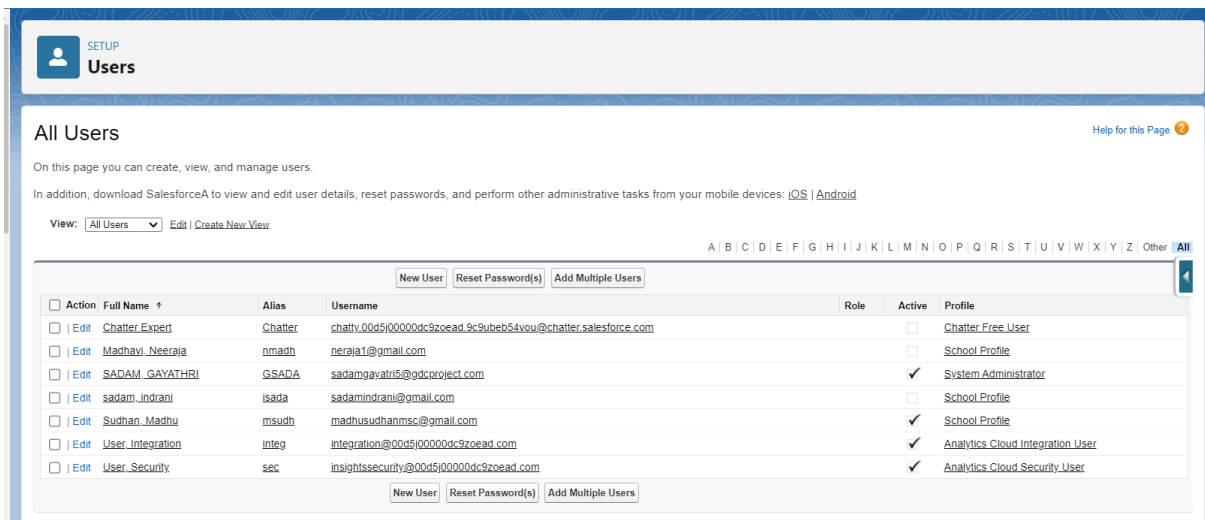
1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name as sadam Indrani and email address and a unique username in the form of an email address.
5. By default, the username is the same as the email address.
6. Select a User License as salesforce.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

❖ User – Teacher

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name as Madhu sudhan and email address and a unique username in the form of an email address.
5. By default, the username is the same as the email address.
6. Select a User License as salesforce.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately.

❖ User – Principal

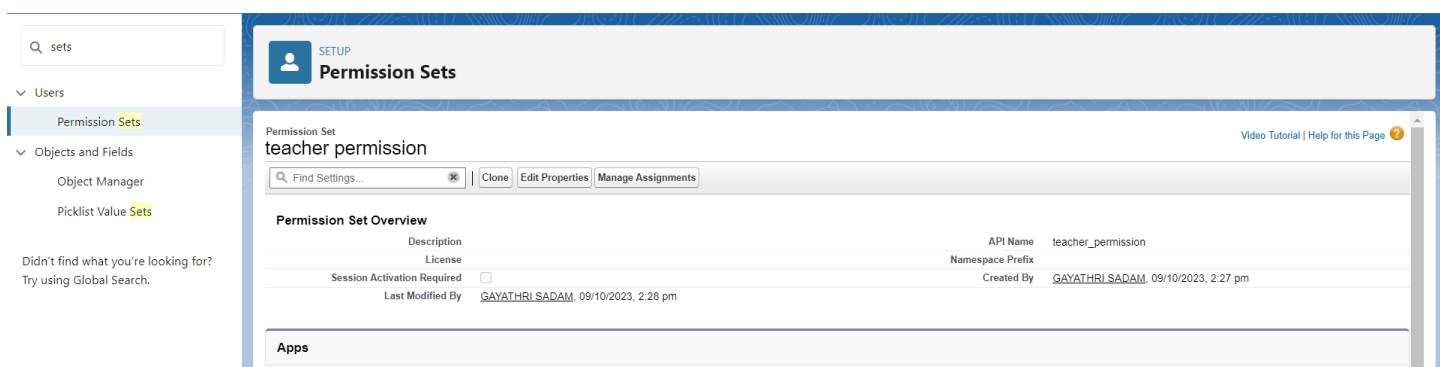
1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name as Neeraja madhavi and email address and a unique username in the form of an email address.
5. By default, the username is the same as the email address.
6. Select a User License as salesforce.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately.



Milestone 07 - Permission Sets

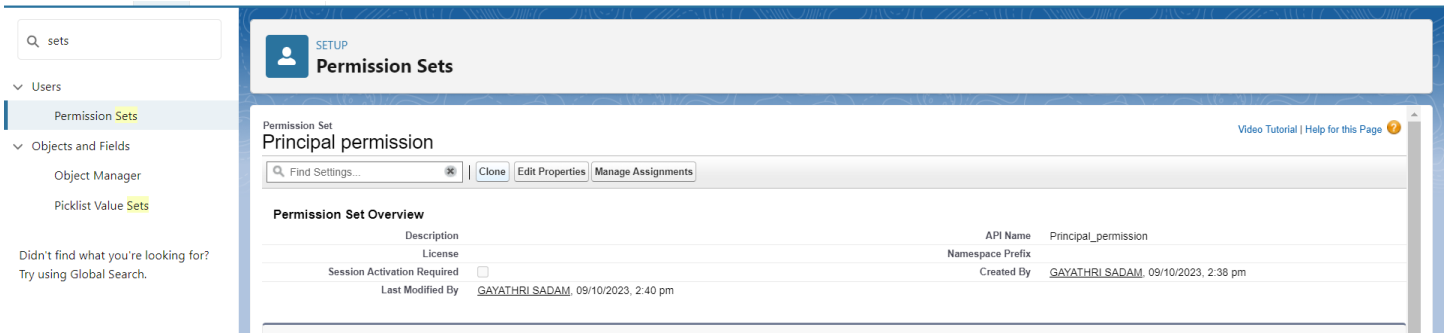
➤ Permission Sets 1

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as teacher permission.
4. Under the object settings give the view all, create and edit permissions to School, student, and teacher custom objects.
5. Click on manage assignment
6. Click on add assignment.
7. Click on madhu sudhan podipattu, Next, Assign.



➤ Permission Sets 2

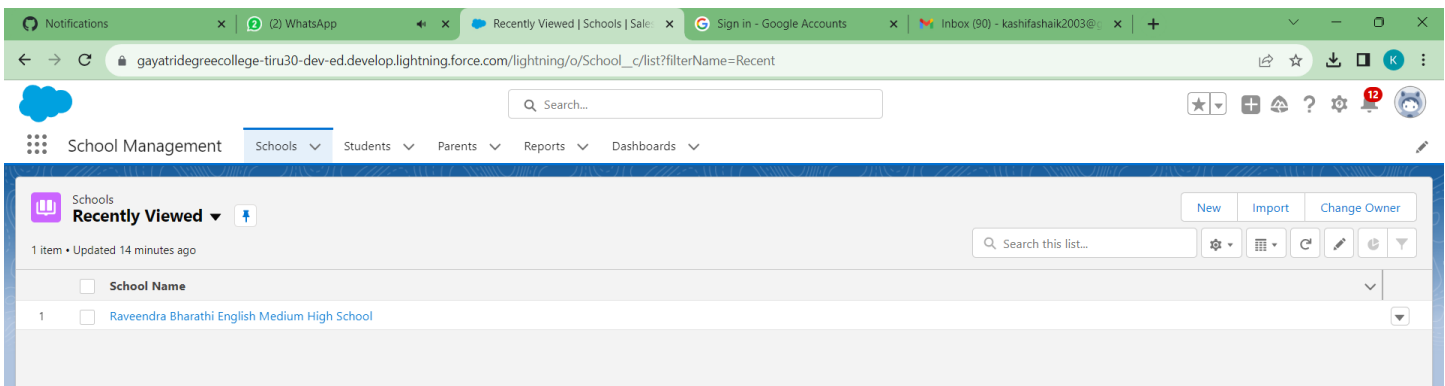
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission.
4. Under the object settings give the view create and edit permissions to School, student, and teacher custom objects.
5. Click on manage assignment
6. Click on add assignment.
7. Click on Neeraja mam, Next, Assign.



Milestone 08 - User Adoption

➤ Create Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools tab.
4. Click new button
5. Fill all School record details.
6. Click on Save Button.



➤ View Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on any record name. you can see the details of the School.

The screenshot shows the 'School Management' app interface. The top navigation bar includes 'Schools', 'Students', 'Parents', 'Reports', and 'Dashboards'. The main header displays the school name 'Raveendra Bharathi English Medium High School' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing a list of school information: School Name, Address (Korlagunta), District (Tirupati), State (AP), School website (www.rbhs.com), Phone Number, Number of students (1), and Highest Marks. The 'Owner' is listed as GAYATHRI SADAM. The 'Created By' and 'Last Modified By' are also GAYATHRI SADAM, with timestamps from 09/10/2023.

➤ Delete Record (School)

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

The screenshot shows the 'Schools' list in the 'School Management' app. A 'Delete School' dialog box is open, asking 'Are you sure you want to delete this School?'. The dialog has 'Cancel' and 'Delete' buttons. In the background, the 'Recently Viewed' list shows 'Raveendra Bharathi English Medium High School' with a dropdown menu open, showing options: 'Edit', 'Delete', and 'Change Owner'.

Milestone 09 – Reports

➤ Create Report:

1. In School Management App click Reports tab.
2. Click New Report.

3. Select the report type as School with students and parents for the report.
4. Click start report.
5. Customize your report, then save and run
6. Give report name – Schools with Students Report
7. Click Save

➤ View Report

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Reports Tab.
4. Click on School with Students report and see records.

Milestone 10 – Triggers

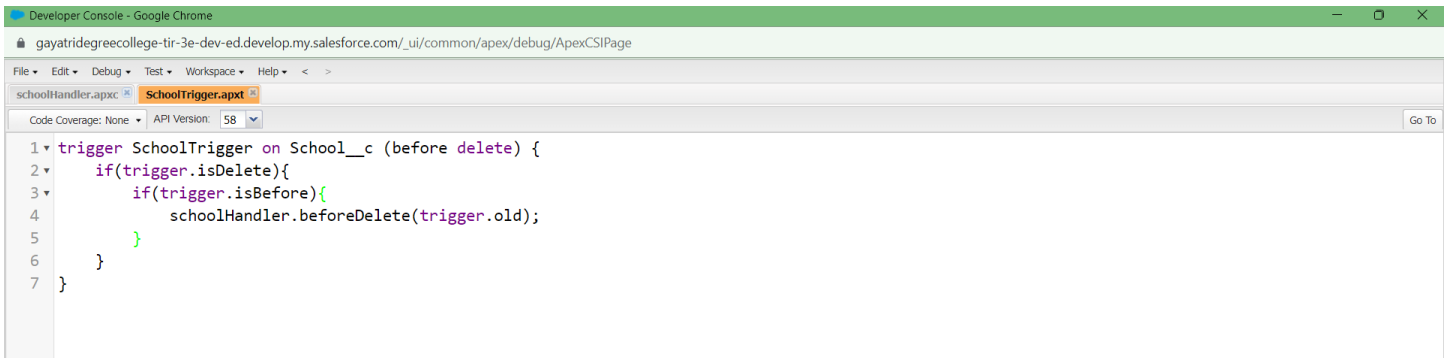
➤ Write A Trigger

write a trigger whenever the school website is null you should be unable to delete the record.

1. Go to the gear icon and select the developer console.
2. From the menu bar click on file and select Apex class.
3. Now give the class name as schoolHandler.
4. Now Write the below code and save.

5. From the menu bar click on file and select Apex trigger.
6. Now give the trigger name as Internalmarks
7. Select Object as School

8. Now Write the below code and save.

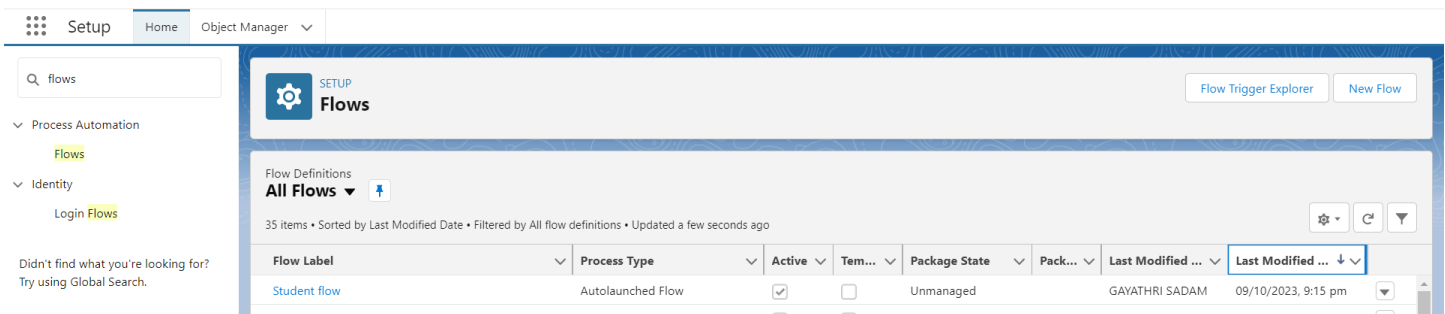


```
1 trigger SchoolTrigger on School__c (before delete) {
2     if(trigger.isDelete){
3         if(trigger.isBefore){
4             schoolHandler.beforeDelete(trigger.old);
5         }
6     }
7 }
```

Milestone 11 – Flows

➤ Create Flow

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Record triggered Flows.
4. In the search bar type student and click done.
5. Select (+)
6. type action and select send Email.
7. Enter the following details
8. Label:Student Record Creation
9. Api Name:Student_Record_Creation(Auto-pupulated)
10. Body: Hi {!\$Record.Name} , we are happy to inform you that you have joined in our {!\$Record.school__r.Name}.
11. Subject: Record Creation
12. Recipient email Address:{!\$Record.Email__c}
13. click on done and Click on save
14. Flow label: Student flow
15. Flow API Name: Student_flow
16. and then click Activate.



Setup Home Object Manager

flows

Process Automation

Flows

Identity

Login Flows

Didn't find what you're looking for? Try using Global Search.

Flow Label	Process Type	Active	Tem...	Package State	Pack...	Last Modified ...	Last Modified ...
Student flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		GAYATHRI SADAM	09/10/2023, 9:15 pm
Find Contact Associated with Mass Email Action	Individual Object Action Flow	<input type="checkbox"/>	<input type="checkbox"/>	Managed Installed			

The End