

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 – TABASSUM ARA & SHAIK
 - ❖ Email – sonushaik1625@gmail.com
 - ❖ Role – SALESFORCE DEVELOPER
 - ❖ Company – GAYATRI DEGREE COLLEGE – TIRUPATI
 - ❖ Country - India
 - ❖ Postal Code – pin code 517501
 - ❖ Username – sonshaik1625@gdcproject.com

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First Name* TABASSUM ARA Last Name* SHAIK

Email* sonushaik1625@gmail.com

Role* Developer

Company* GAYATRI DEGREE COLLEGE-TIRUPATI

Country/Region* India

State/Province* Andhra Pradesh

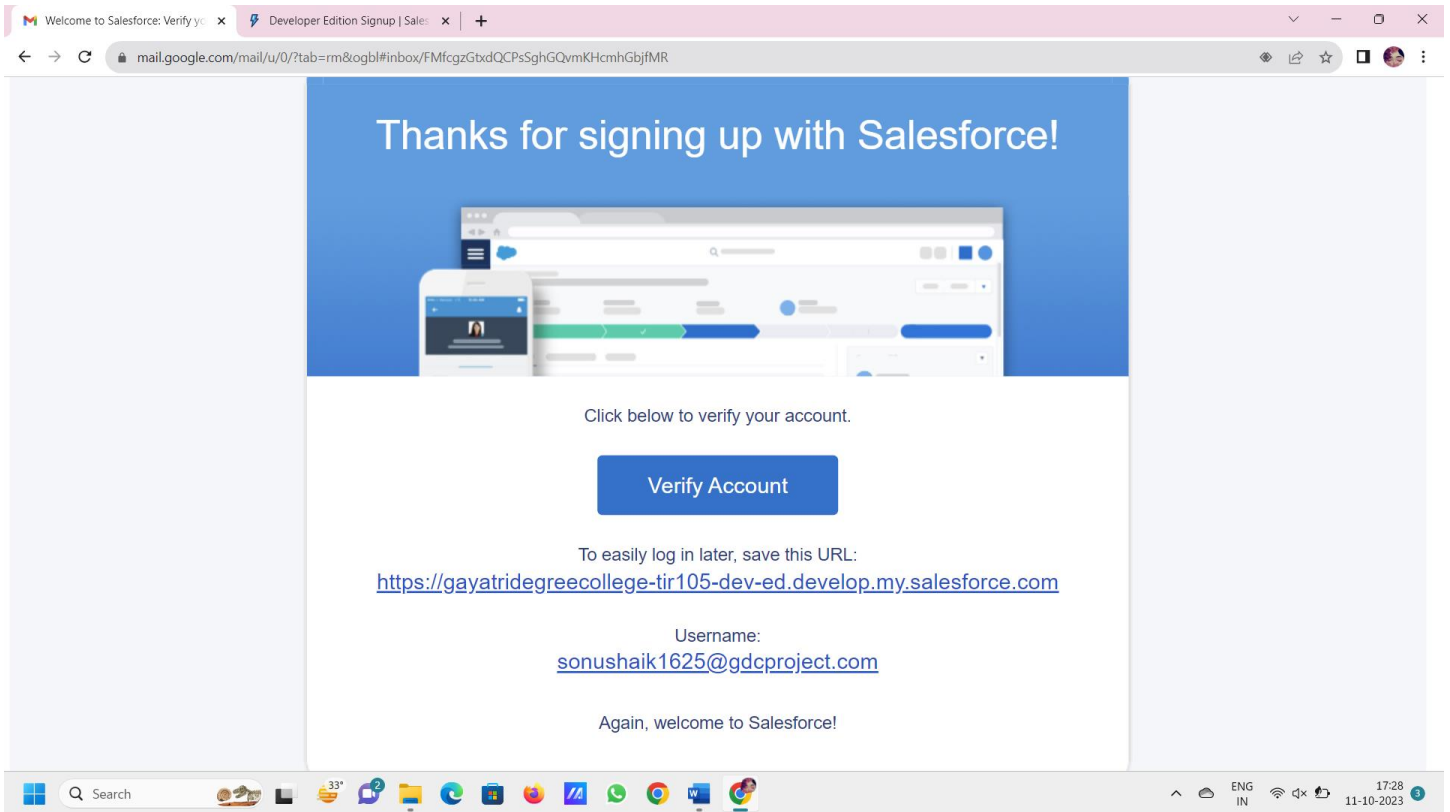
Postal Code* 517501

Username* sonushaik1625@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 high-credential. Read more about username recommendations.

☒ I Agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement.

Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time.



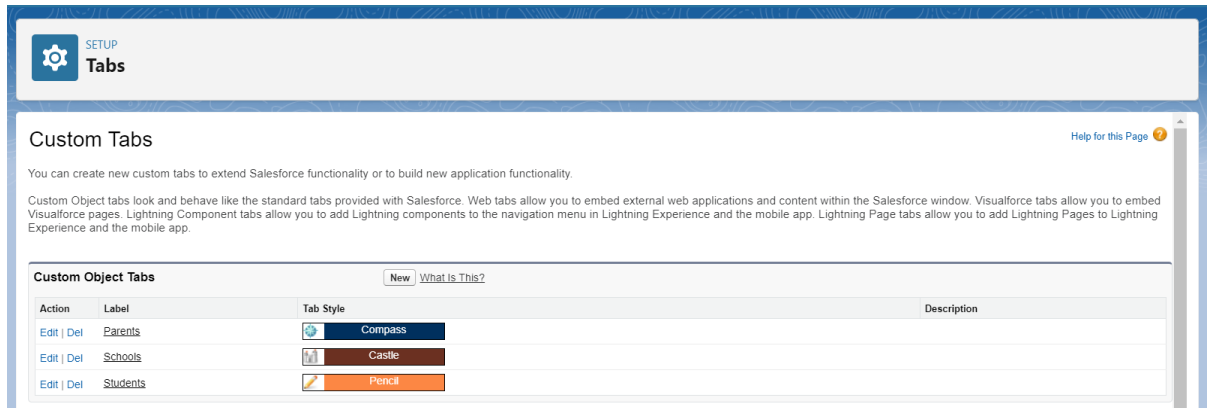
Milestone 02 – Creation of Object

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.

Object Manager						
50+ Items. Sorted by Last Modified						
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	✓	▼
Work Type Group Member	WorkTypeGroupMember	Standard Object				

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

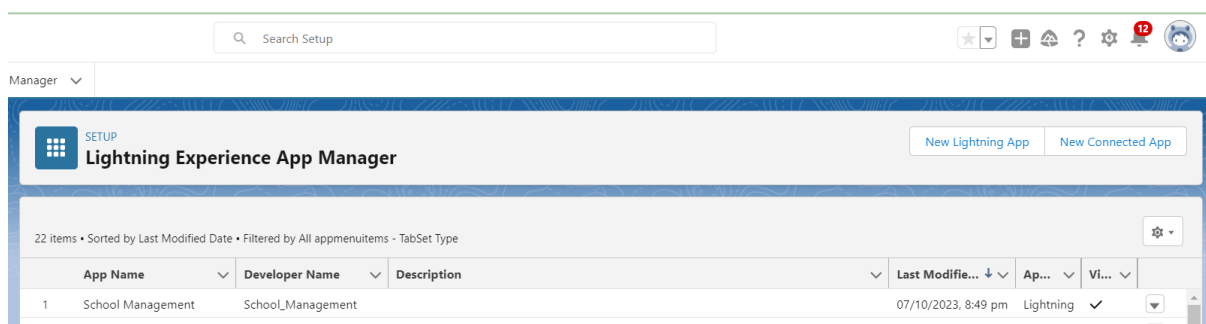


Milestone 03 - Lightning App

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

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)		
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:

[Setup](#)
[Home](#)
[Object Manager](#)

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Fields & Relationships

6 Items, Sorted by Field Label

[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		

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.

SETUP

Profiles

Profile

School Profile

Help for this Page

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 \(0\)](#) |
 [Enabled Apex Class Access \(0\)](#) |
 [Enabled Visualforce Page Access \(0\)](#) |
 [Enabled External Data Source Access \(0\)](#) |
 [Enabled Named Credential Access \(0\)](#) |
 [Enabled External Credential Principal Access \(0\)](#) |
 [Enabled Custom Metadata Type Access \(0\)](#) |
 [Enabled Custom Setting Definitions Access \(0\)](#) |
 [Enabled Flow Access \(0\)](#) |
 [Enabled Service Presence Status Access \(0\)](#) |
 [Enabled Custom Permissions \(0\)](#)

Profile Detail

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

Name	School Profile
User License	Salesforce
Description	Custom Profile ✓
Created By	TABASSUMARA SHAIK 09/10/2023, 10:55 am
Modified By	TABASSUMARA SHAIK 09/10/2023, 10:12 pm

Page Layouts

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

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 Sardar Basha 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 Podipattu 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 mam 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

SETUP

Users

All Users

Help for this Page

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 | Other | All

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_00d5h000008jdneai.ywo10uhyhvv@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	Irshad Shaik	siirsh	irshadshaik2825@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/>	Edit	Madhu Sudhan	ms	p.madhusudhanmsc1234@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/>	Edit	Reddy Neeraja	nredd	neerajareddy12@gmail.com		<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/>	Edit	SHAIK TABASSUM ARA	TSHAI	sonushaik1625@gdcproject.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	User Integration	integ	integration@00d5h000008jdneai.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User Security	sec	insightssecurity@00d5h000008jdneai.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

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 | Other | All

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.

SETUP

Permission Sets

Permission Set

teacher permission

Video Tutorial

Help for this Page

Find Settings...

Clone

Edit Properties

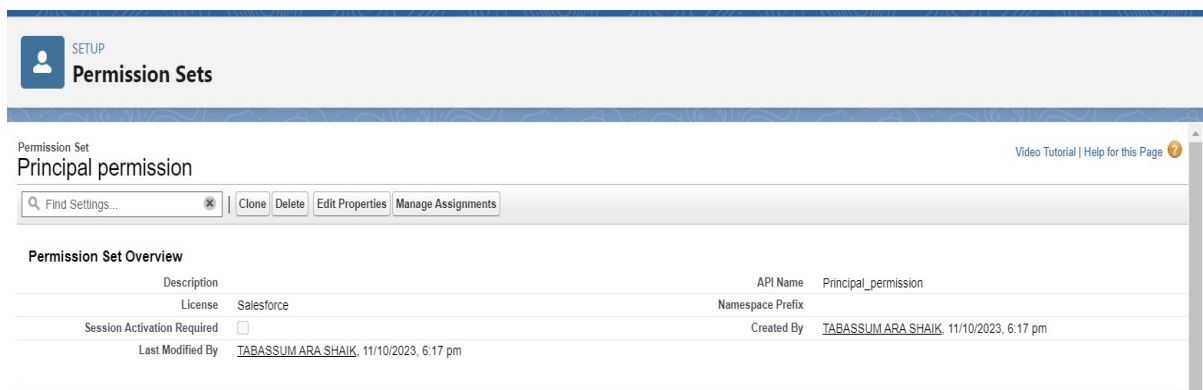
Manage Assignments

Permission Set Overview

Description	API Name	teacher_permission
License	Namespace Prefix	
Session Activation Required	Created By	TABASSUM ARA SHAIK 09/10/2023, 12:24 pm
Last Modified By	TABASSUM ARA SHAIK 09/10/2023, 12:31 pm	

➤ Permission Sets 2

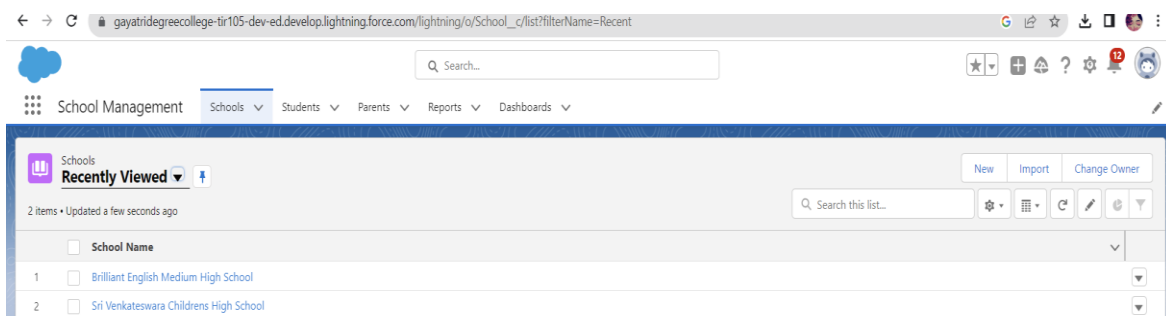
1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as Principal permission.
4. Under the object settings give the view create and edit permissions to School, student, and teacher custom objects.
5. Click on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



Milestone 08 - User Adoption

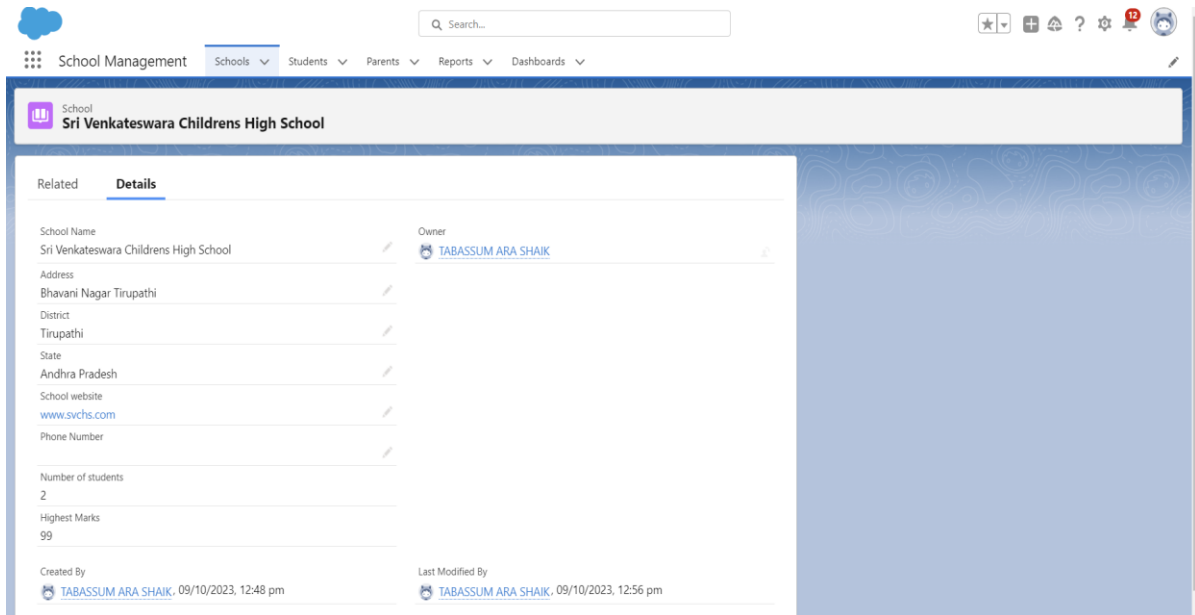
➤ Create Record (School)

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.



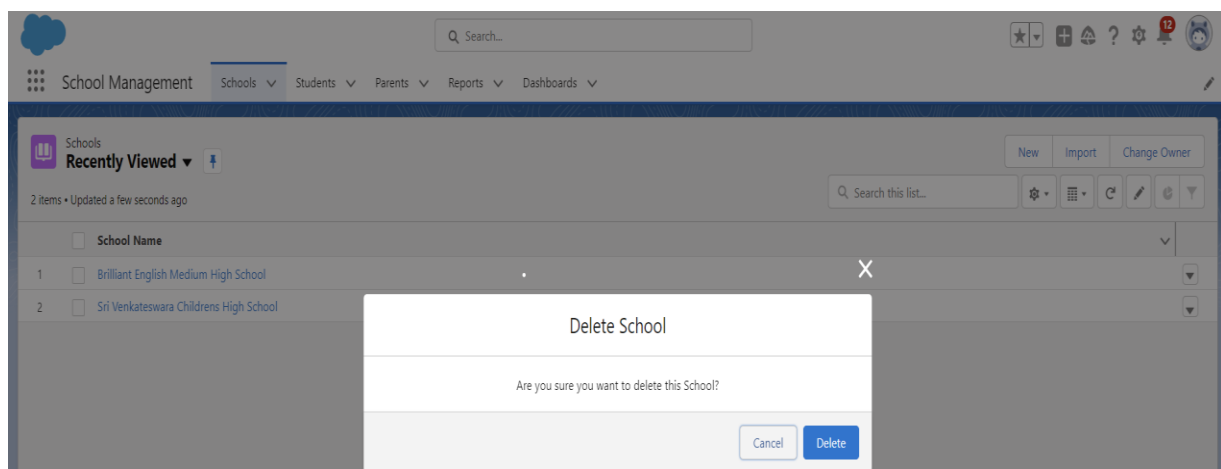
➤ View Record (School)

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.



➤ Delete Record (School)

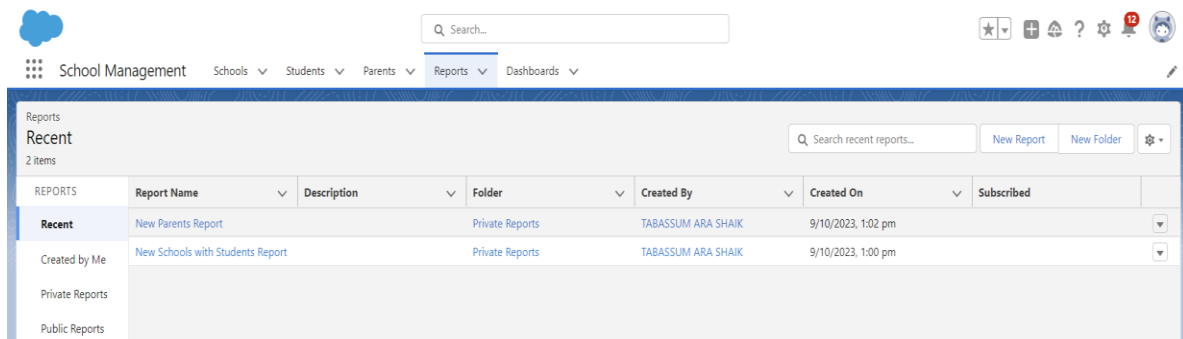
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



Milestone 09 – Reports

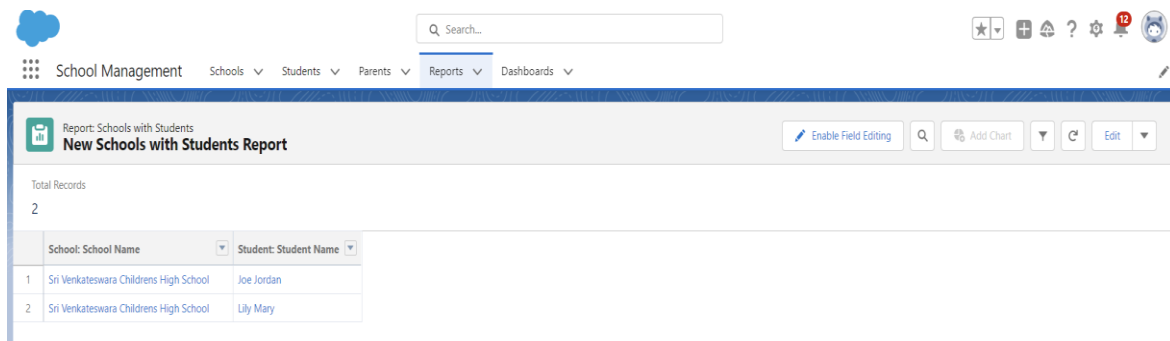
➤ Create Report:

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.

The screenshot shows the Salesforce Developer Console with the Apex class 'schoolHandler.apxc' open. The code is as follows:

```

1 public class schoolHandler {
2     public static void beforeDelete(list<School__c> oldlist){
3         for(School__c s : oldlist){
4             if(s.School_website__c == null ){
5                 s.addError('you cannot delete the record');
6             }
7         }
8     }
9 }

```

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.

The screenshot shows the Salesforce Developer Console with the Apex trigger 'SchoolTrigger.apxt' open. The code is as follows:

```

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

Flows

Flow

Student flow

Help for this Page

« Back to List: Flows

Flow Detail

EditOpenRunDelete

Flow Label	Student flow	Flow API Name	Student_flow
Description		Namespace Prefix	
Environments	Default	Type	Autolaunched Flow
Active Version	1	URL	/flow/Student_flow
Trigger	Record—Run After Save	Activated/Deactivated By	TABASSUM ARA SHAIK, 09/10/2023, 10:26 pm
Modified By	TABASSUM ARA SHAIK, 09/10/2023, 10:26 pm	Created By	TABASSUM ARA SHAIK, 09/10/2023, 10:26 pm

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Run in Mode	API Version for Running the Flow
Open Run Deactivate	Student flow	1		Flow Builder	09/10/2023, 10:26 pm	Autolaunched Flow	Active	Default Mode	58.0

THE END