

# PROJECT REPORT ON CREATION OF AN APPLICATION FOR SCHOOL MANAGEMENT

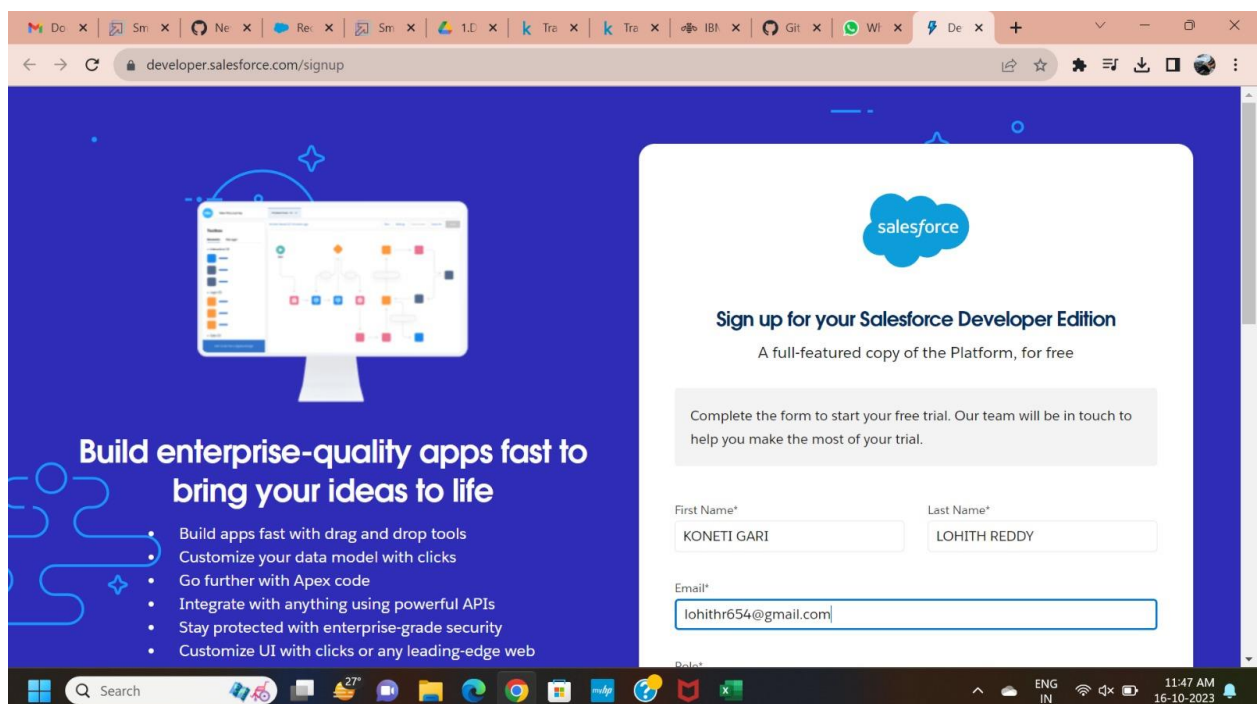
## Introduction:

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 crosstechnology 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 Admin Org

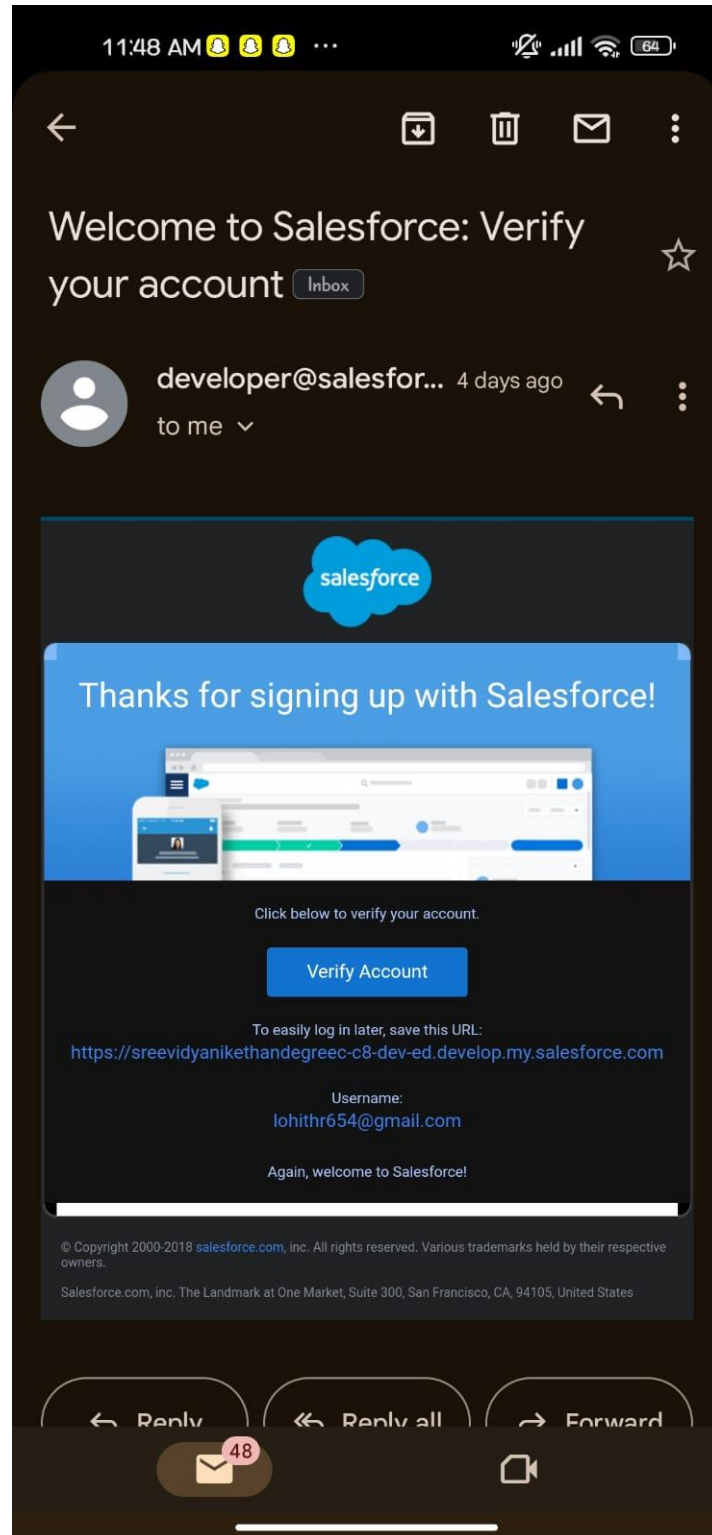
Go to [developer.salesforce.com](https://developer.salesforce.com) Click on sign up.

- On the sign up form, enter the following details
- First name & Last name - Koneti Gari Lohith Reddy
- Email - [lohithr654@gmail.com](mailto:lohithr654@gmail.com)
- Role - SALESFORCE ADMIN
- Company - Sree Vidhyanikethan-Rangampeta
- Country - India
- Postal Code - pin code 517501
- Username - [lohith654@gmail.com](mailto:lohith654@gmail.com)



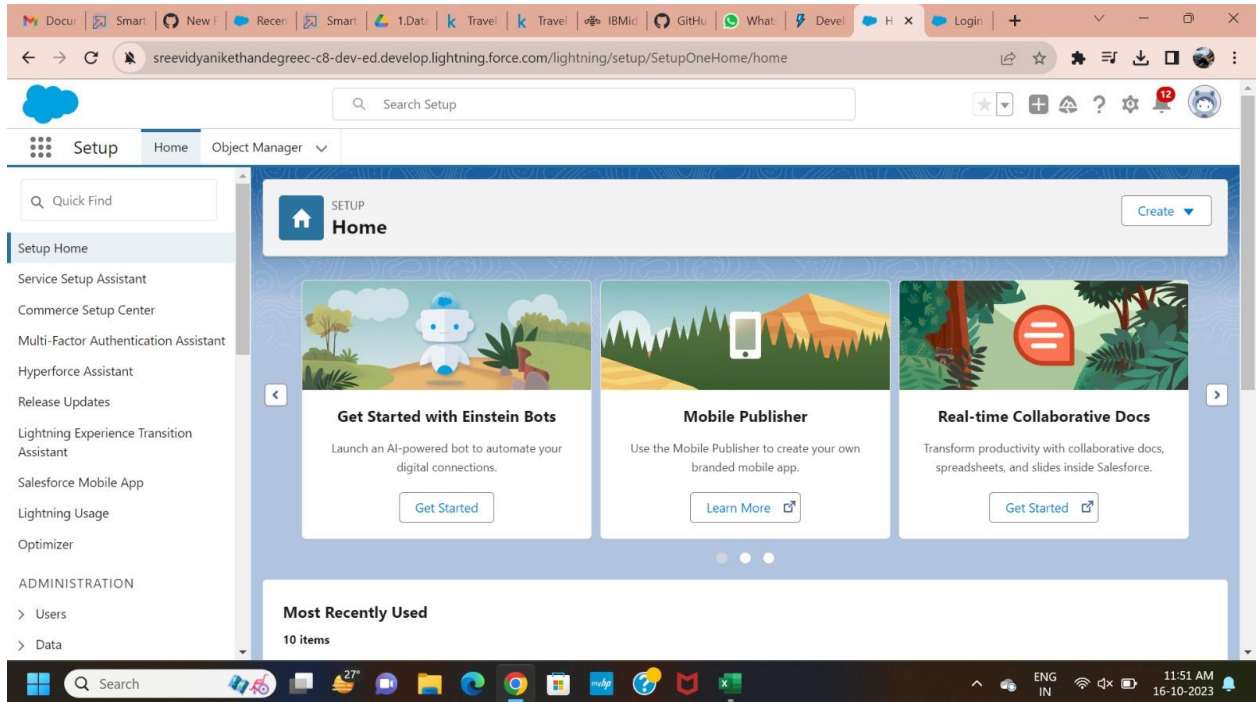
## Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



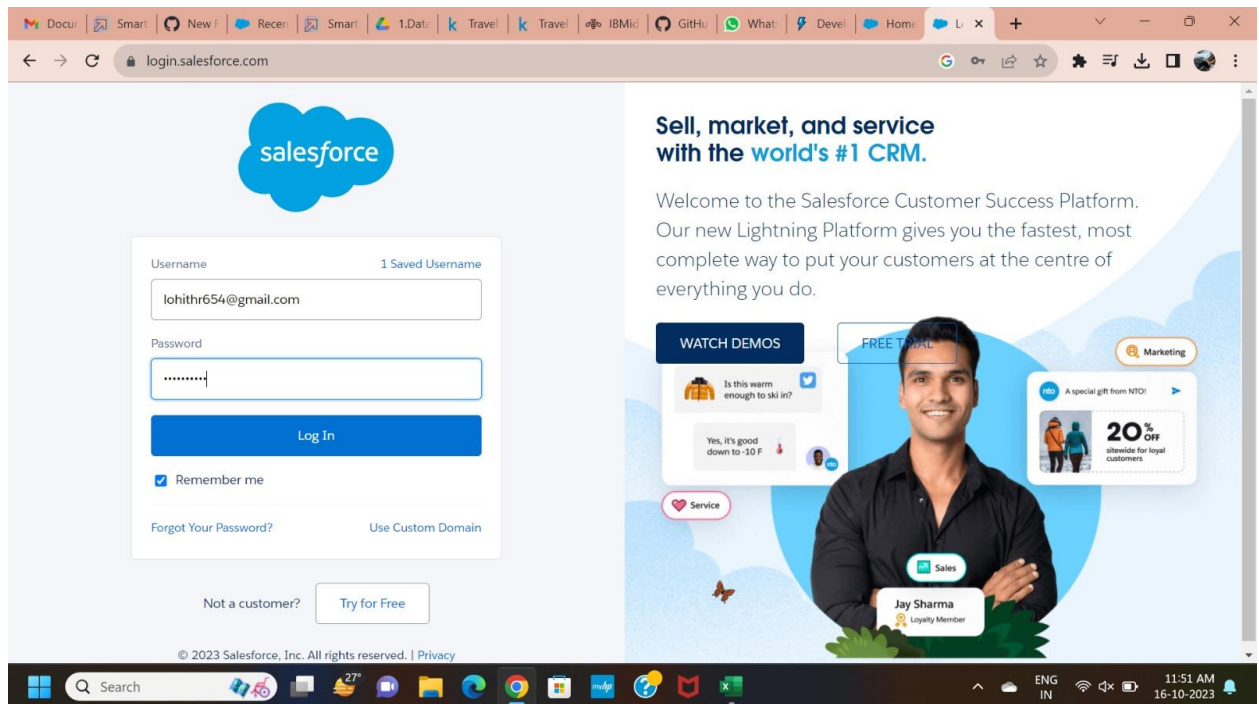
## Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



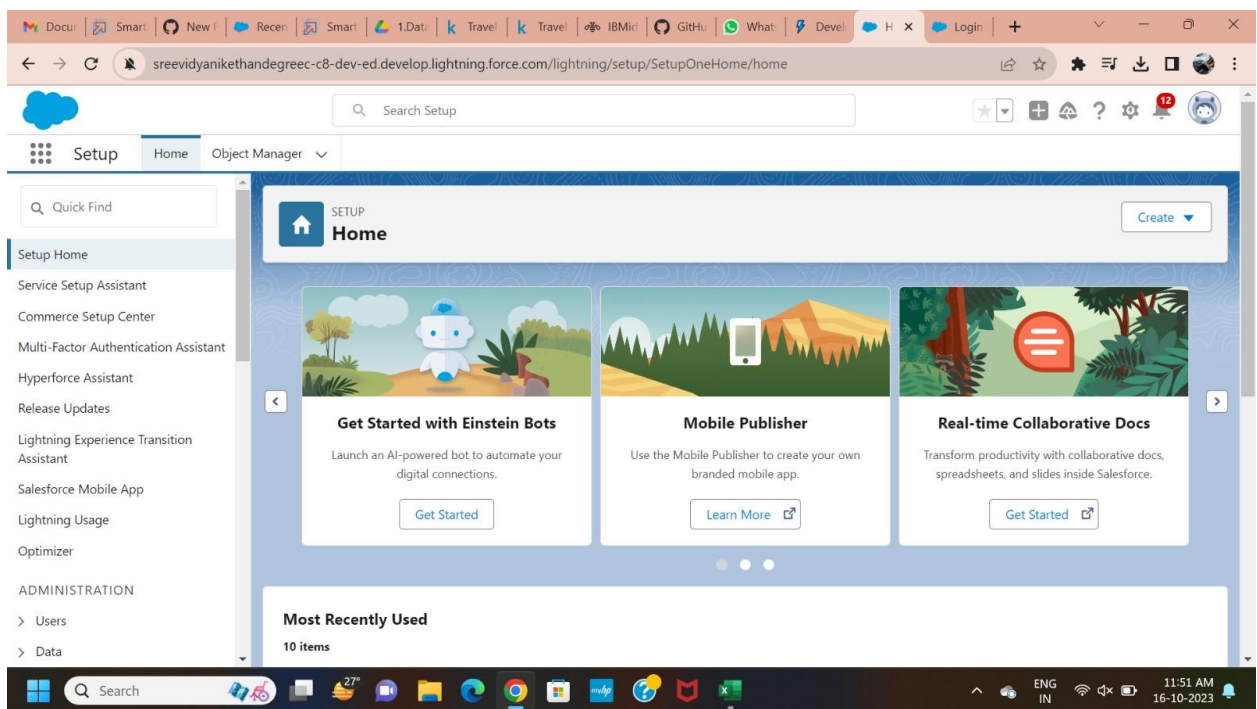
## Salesforce Login

<https://login.salesforce.com>



## 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.



## 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.
4. Under Utility Items, leave as is and click Next.
5. From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.
6. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Lightning Experience App Manager' and displays a list of 22 items, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The bottom of the screen shows the Windows taskbar with the time 11:53 AM on 16-10-2023.

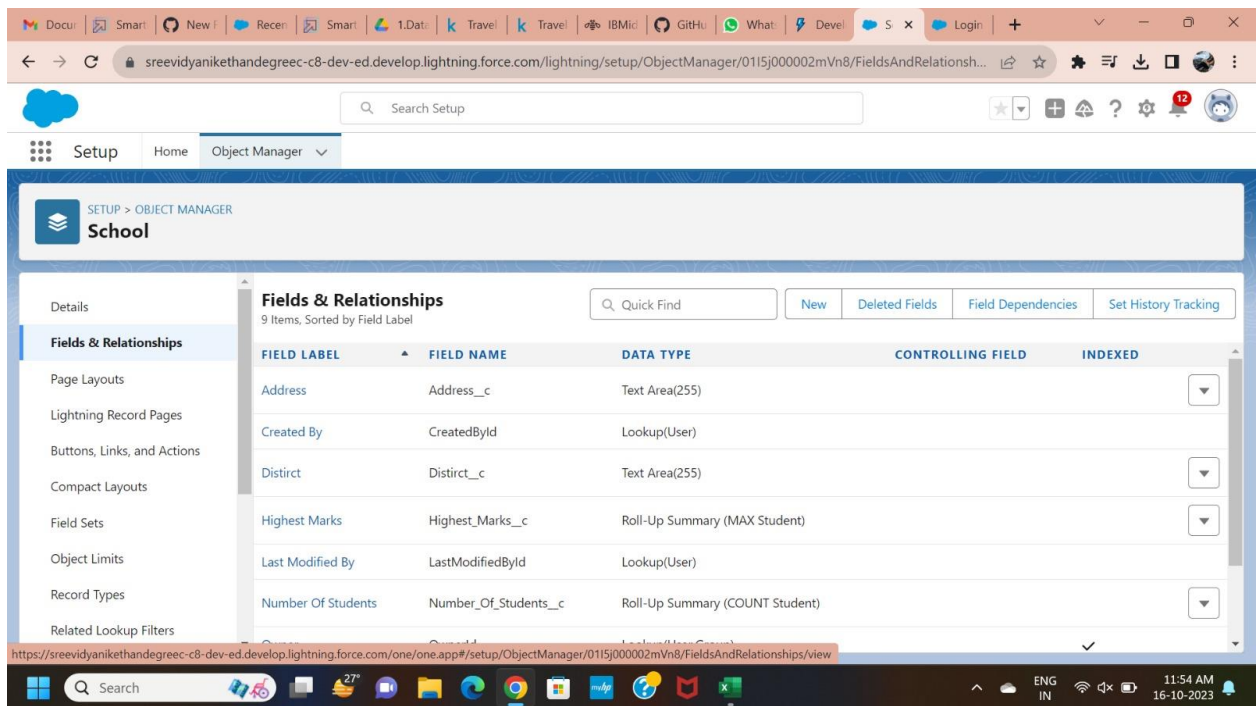
|    | App Name ↑          | Developer Name           | Description  | Last Modified ...    | Ap...     | Vi... |
|----|---------------------|--------------------------|--|----------------------|-----------|-------|
| 1  | All Tabs            | AllTabSet                |  | 12/10/2023, 11:03 am | Classic   |       |
| 2  | Analytics Studio    | Insights                 | Build CRM Analytics dashboards and apps            | 12/10/2023, 11:03 am | Classic   | ✓     |
| 3  | App Launcher        | AppLauncher              | App Launcher tabs                                  | 12/10/2023, 11:03 am | Classic   | ✓     |
| 4  | Bolt Solutions      | LightningBolt            | Discover and manage business solutions designe...  | 12/10/2023, 11:06 am | Lightning | ✓     |
| 5  | Community           | Community                | Salesforce CRM Communities                         | 12/10/2023, 11:03 am | Classic   | ✓     |
| 6  | Content             | Content                  | Salesforce CRM Content                             | 12/10/2023, 11:03 am | Classic   | ✓     |
| 7  | Data Manager        | DataManager              | Use Data Manager to view limits, monitor usage,... | 12/10/2023, 11:03 am | Lightning | ✓     |
| 8  | Digital Experiences | SalesforceCMS            | Manage content and media for all of your sites.    | 12/10/2023, 11:03 am | Lightning | ✓     |
| 9  | Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning ...  | 12/10/2023, 11:03 am | Lightning | ✓     |
| 10 | Marketing           | Marketing                | Best-in-class on-demand marketing automation       | 12/10/2023, 11:03 am | Classic   | ✓     |



## 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.

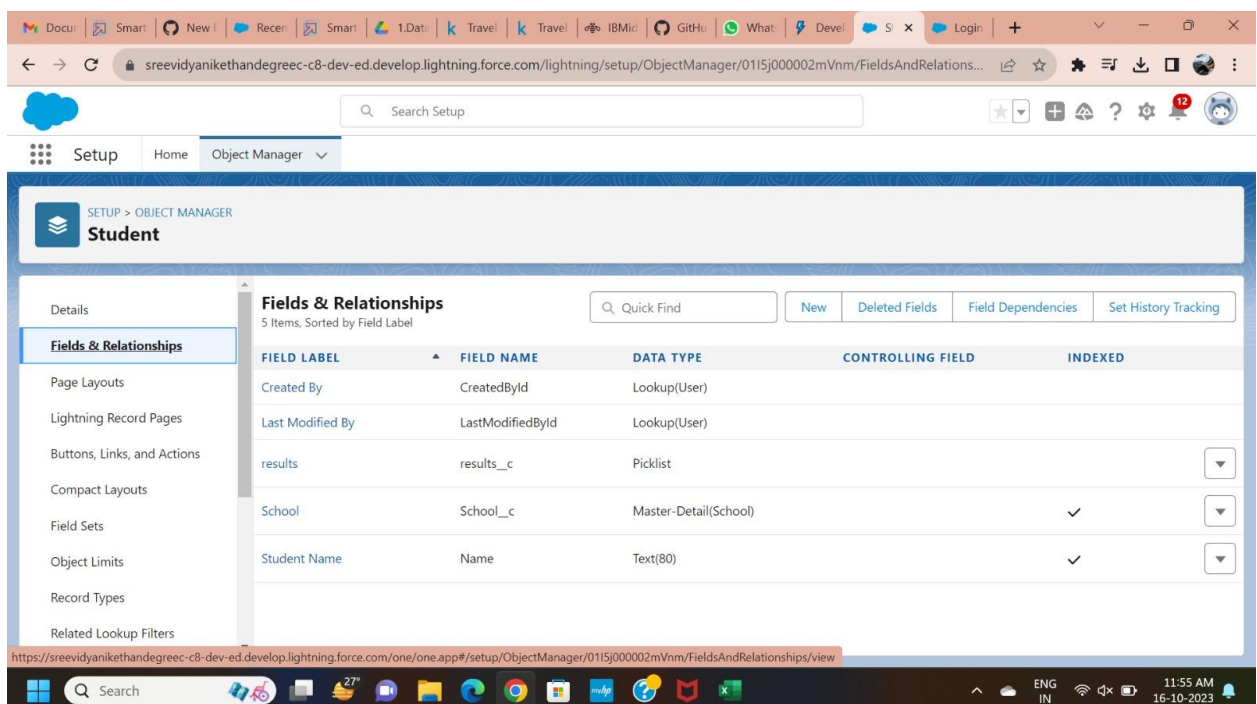
### Fields in School Object:



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The fields are sorted by Field Label. The table below shows the details of the fields:

| FIELD LABEL        | FIELD NAME            | DATA TYPE                       | CONTROLLING FIELD | INDEXED |
|--------------------|-----------------------|---------------------------------|-------------------|---------|
| Address            | Address__c            | Text Area(255)                  |                   |         |
| Created By         | CreatedById           | Lookup(User)                    |                   |         |
| Distirct           | Distirct__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) |                   |         |

### Fields in Student Object:



The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a list of 5 fields. The fields are sorted by Field Label. The table below shows the details of the fields:

| FIELD LABEL      | FIELD NAME       | DATA TYPE             | CONTROLLING FIELD | INDEXED |
|------------------|------------------|-----------------------|-------------------|---------|
| Created By       | CreatedById      | Lookup(User)          |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)          |                   |         |
| 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 for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows a list of 6 items, sorted by Field Label. The table below lists the fields and their properties.

| 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
4. Click Save.
5. While still on the School profile page, then click Edit.
6. Scroll down to Custom Object Permissions and Give view all access permissions.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Profiles' and shows the 'School Profile' configuration page. The page includes a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is the 'Page Layouts' section, which lists 'Global' and 'Global Layout' under 'Standard Object Layouts'. The 'Object Milestone' section is also visible, showing 'Object Milestone' and 'Object Milestone Layout'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 11:56 AM on 16-10-2023.

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

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 [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   | KONETI GARI LOHITH REDDY, 13/10/2023, 6:09 pm |
| Modified By  | KONETI GARI LOHITH REDDY, 13/10/2023, 6:10 pm |

Page Layouts

Standard Object Layouts

|                  |                         |
|------------------|-------------------------|
| Global           | Global Layout           |
| Object Milestone | Object Milestone 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 SardarBasha 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 Charan 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 – 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 Madhusudhanpodipattu 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.

./

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The user 'LOHITH REDDY KONETI GARI' is selected, and the 'User Integration' profile is chosen. The bottom of the screen shows a Windows taskbar with various application icons and system information.

| Action                                     | Full Name                | Alias   | Username   | Role | Active | Profile                          |
|--|--------------------------|---------|--|------|--------|----------------------------------|
| <input type="checkbox"/>   Edit            | Chatter Expert           | Chatter | chattv.00d500000dosoueaq.pcofbixvixia@chatter.salesforce.com |      | ✓      | Chatter Free User                |
| <input type="checkbox"/>   Edit            | LOHITH REDDY KONETI GARI | KLOHI   | lohit654@gmail.com   |      | ✓      | System Administrator             |
| <input checked="" type="checkbox"/>   Edit | LOHITH REDDY KONETI GARI | LUCKY   | lohit6543@gmail.com  |      | ✓      | School Profile                   |
| <input type="checkbox"/>   Edit            | User Integration         | integ   | integration@00d500000dosoueaq.com                            |      | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/>   Edit            | User Security            | sec     | insightssecurity@00d500000dosoueaq.com                       |      | ✓      | Analytics Cloud Security User    |

## 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 madhusudhanpodipattu,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.

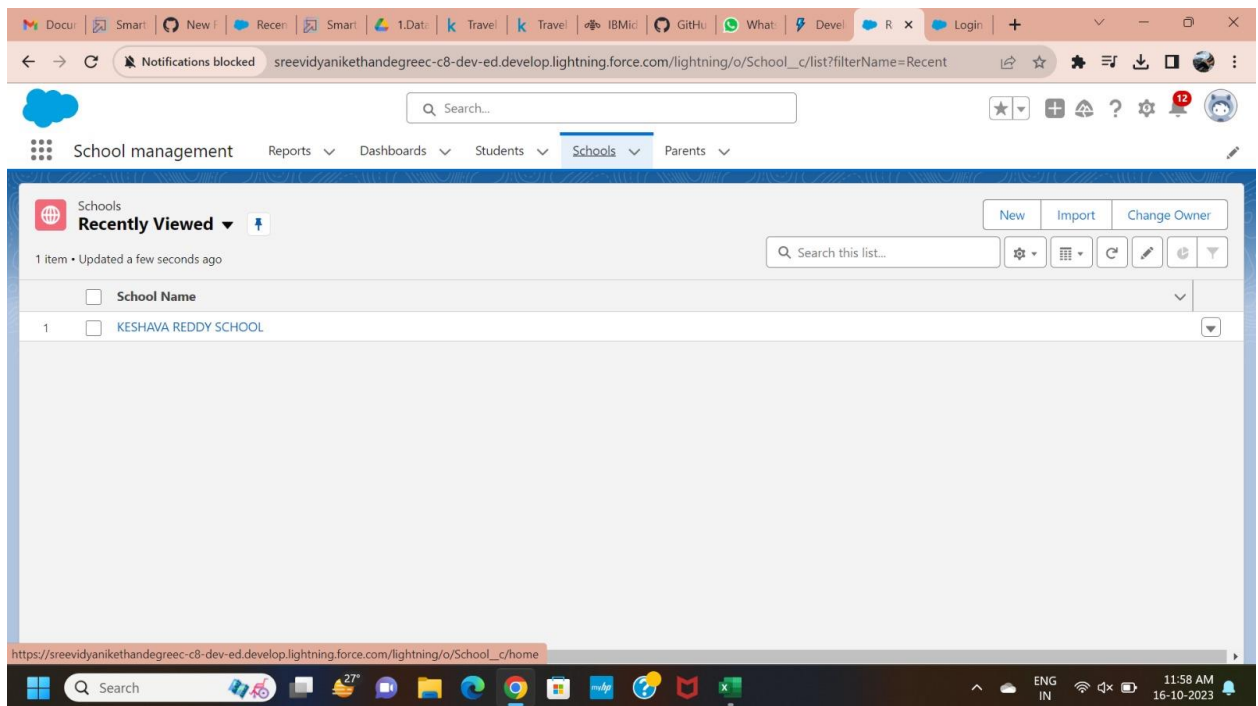
The screenshot displays the Salesforce Setup interface for Permission Sets. The left sidebar shows the navigation menu with 'Users' selected. The main content area is titled 'Permission Sets' and includes a search bar and a list of existing permission sets. The table below shows the details of these permission sets.

| Action                   | Permission Set Label                  | Description  | License                                    |
|--------------------------|---------------------------------------|--|--|
| <input type="checkbox"/> | Buyer                                 | Allows access to the store. Lets users see products ...    | B2B Buyer Permission Set One Seat          |
| <input type="checkbox"/> | Buyer Manager                         | Includes all Buyer capabilities, and allows access to ...  | B2B Buyer Manager Permission Set One Seat  |
| <input type="checkbox"/> | C360 High Scale Flow Integration User | Allows integration user to access features specific to ... | Cloud Integration User                     |
| <input type="checkbox"/> | CRM User                              | Denotes that the user is a Sales Cloud or Service Cl...    | CRM User                                   |
| <input type="checkbox"/> | Commerce Admin                        | Allow access to commerce admin features.                   | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> | Contact Center Admin                  | Manage Service Cloud Voice contact centers that us...      | Service Cloud Voice User                   |
| <input type="checkbox"/> | Contact Center Agent                  | Access agent features in Service Cloud Voice contac...     | Service Cloud Voice User                   |

## 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.

The screenshot displays the Salesforce Lightning interface. At the top, the browser address bar shows the URL: `sreevidyanikethandegreec-c8-dev-ed.develop.lightning.force.com/lightning/r/School__c/a005j00000PpReFAAN/view`. The Salesforce header includes a search bar and navigation tabs: 'School management', 'Reports', 'Dashboards', 'Students', 'Schools' (selected), and 'Parents'. Below the header, the page title is 'KESHAVA REDDY SCHOOL'. On the right, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content area is divided into 'Related' and 'Details' tabs, with 'Details' selected. The 'Details' tab shows the following information:

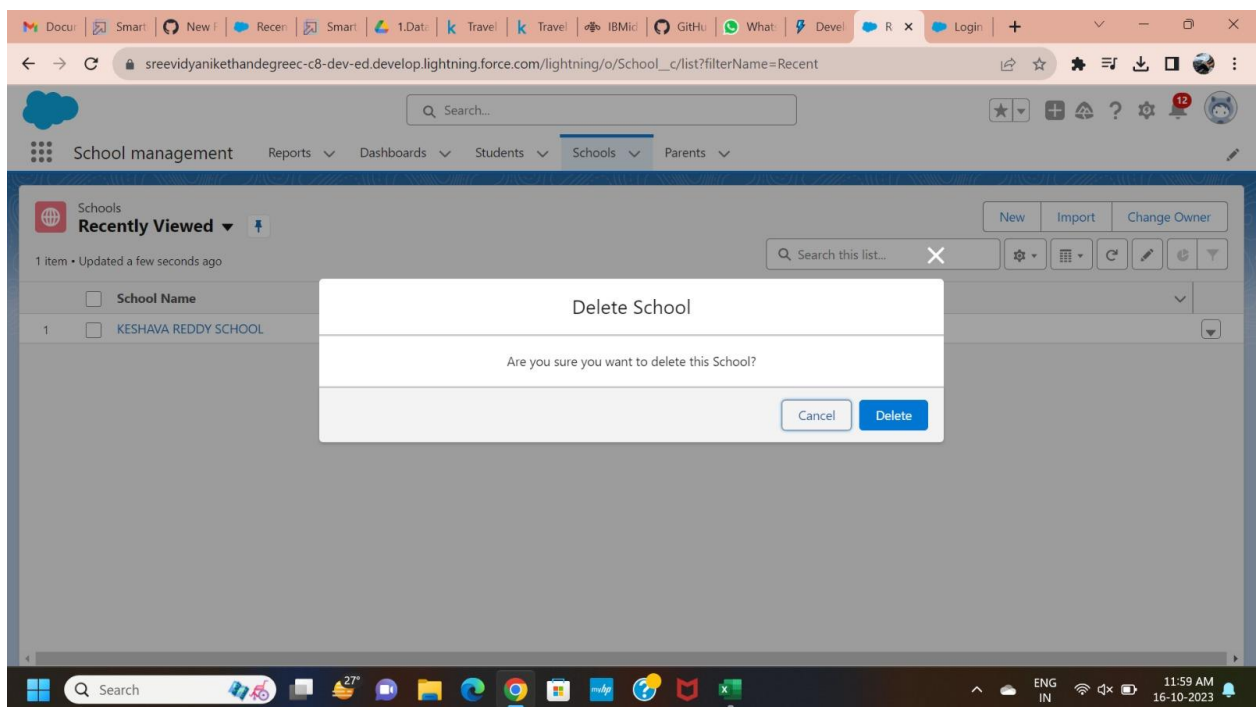
| Field              | Value                      |
|--------------------|----------------------------|
| School Name        | KESHAVA REDDY SCHOOL       |
| Owner              | KONETI GARI LOHITH REDDY   |
| Address            | MR PALLI CIRCLE, TIRUPATHI |
| Distirct           | TIRUPATHI                  |
| State              | ANDHRA PRADESH             |
| Number Of Students | 0                          |
| Highest Marks      |                            |
| Created By         |                            |
| Last Modified By   |                            |

The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 11:58 AM on 16-10-2023.



## Delete Record (School)

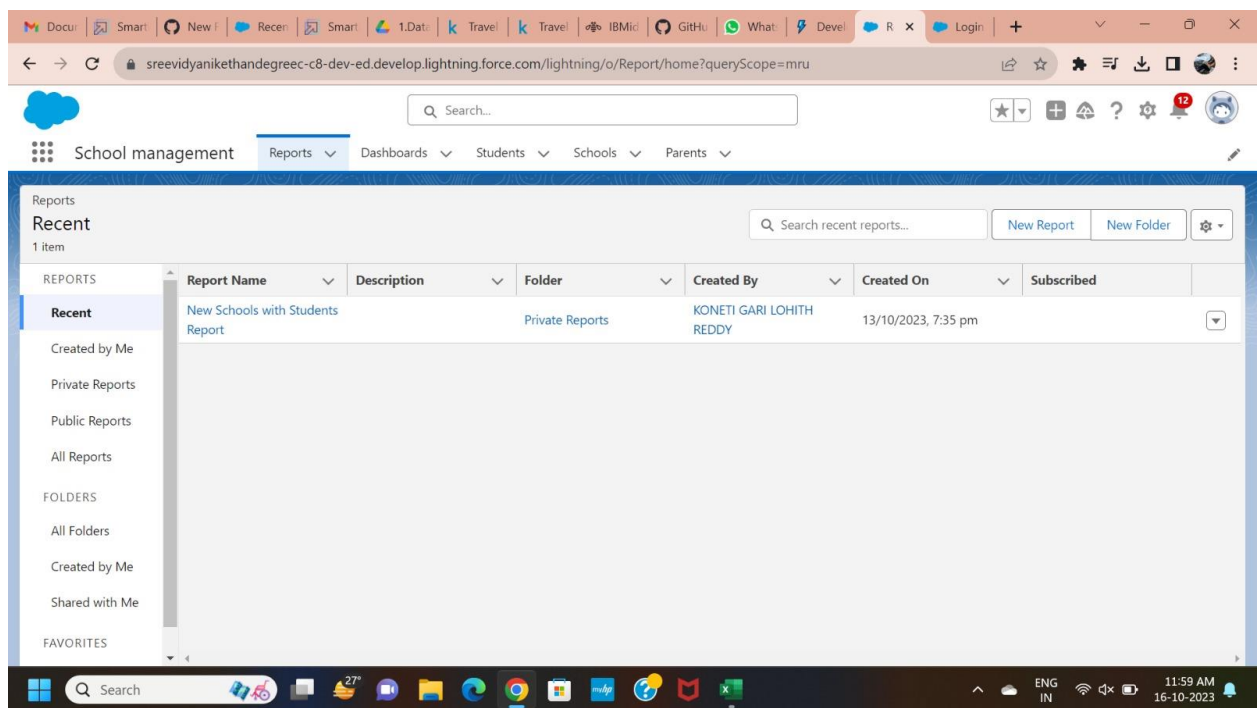
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



## 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.

**THE END**