

# NAAN MUDHALVAN

## SALESFORCE PROJECT REPORT

**COLLEGE : PSN INSTITUTE OF TECHNOLOGY AND SCIENCE**

**BATCH – 2**

NAME	NM ID	REG NO
DEEPAN D	06ED6A12EC9269FAF8E4F92C7003FE64	952420104003
JASMINE J	07385B225EE2CFAA674401B41B7E5A08	952420104010
KALEESWARAN V	188870D71E130D9B4DC4199E6163494C	952420104012
MALLIKA DEVI M	F2077AFC7BDACDC82A243314A17BEBA5	952420104015

## Step 1: Create a Salesforce Account

The screenshot shows a web browser window with a Salesforce user profile for 'Kaleeswaran V'. The browser's address bar shows the URL 'vk64-dev-ed.develop.lightning.force.com/lightning/r/User/0055j000009QPSIAA4/view'. The Salesforce navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, People, and More. The user profile card features a profile picture of a cat, the name 'Kaleeswaran V', and a bio: 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. There are buttons for 'Edit' and 'User Detail'. Below the profile card, there are sections for 'Details' and 'Related'. The bottom of the browser window shows a Windows taskbar with various application icons and a system tray displaying '27°C Mostly cloudy' and the time '9:16 AM 10/20/2023'.

## Step 2 : Create the Objects( School , Student , Parent)

The screenshot displays the Salesforce 'Object Manager' interface. The browser's address bar shows the URL 'vk64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home'. The 'Object Manager' page has a search bar with 'school' entered and buttons for 'Schema Builder' and 'Create'. Below the search bar, a table lists the objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One object is listed: 'School' with API NAME 'School\_c', TYPE 'Custom Object', LAST MODIFIED '17/10/2023', and DEPLOYED status '✓'. The bottom of the browser window shows a Windows taskbar with various application icons and a system tray displaying '27°C Mostly cloudy' and the time '9:17 AM 10/20/2023'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	School_c	Custom Object		17/10/2023	✓

Object Manager | Salesforce x New Tab

vk64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Online Shopping sit... PRABHUS Gmail YouTube Translate W3 SCHOOL Google Forms Insta Whatsapp Twitter Facebook Telegram Anna University - C...

Search Setup

Setup Home Object Manager

SETUP  
**Object Manager**  
1 Items, Sorted by Label

stud Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student__c	Custom Object		17/10/2023	✓

27°C Mostly cloudy 9:18 AM 10/20/2023

Object Manager | Salesforce x New Tab

vk64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

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Search Setup

Setup Home Object Manager

SETUP  
**Object Manager**  
1 Items, Sorted by Label

pare Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		17/10/2023	✓

27°C Mostly cloudy 9:18 AM 10/20/2023

### Step 3 : Create Fields for respective objects(School , Student , Parents)

Schools with Students Report | School | Salesforce

vk64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000253Xn/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

School

Details

Fields & Relationships

11 Items, Sorted by Field Label

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(37)		
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(37)		

27°C Mostly cloudy 9:28 AM 10/20/2023

Schools with Students Report | Parent | Salesforce

vk64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000253Xs/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Parent

Details

Fields & Relationships

6 Items, Sorted by Field Label

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		

27°C Mostly cloudy 9:29 AM 10/20/2023

Schools with Students Report | Student | Salesforce | New Tab

vk64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j0000024u34/FieldsAndRelationships/view

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Search Setup

Setup Home Object Manager

Student

Details

Fields & Relationships

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

Scoping Rules

Fields & Relationships

9 Items, Sorted by Field Label

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)		
E-Mail	E_Mail__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)		✓

27°C Mostly cloudy 9:26 AM 10/20/2023

New Parent | Salesforce | New Tab

vk64-dev-ed.develop.lightning.force.com/lightning/o/Parent\_\_c/new?count=3&nooverride=1&useRecordTypeCheck=1&navig...

Online Shopping sit... PRABHUS Gmail YouTube Translate W3 SCHOOL Google Forms Insta Whatsapp Twitter Facebook Telegram Anna University - C...

Search...

School Managemen...

Parents

Recently Viewed

0 items • Updated a few seconds ago

Parent Name

New Parent

Information

\* Parent Name Owner

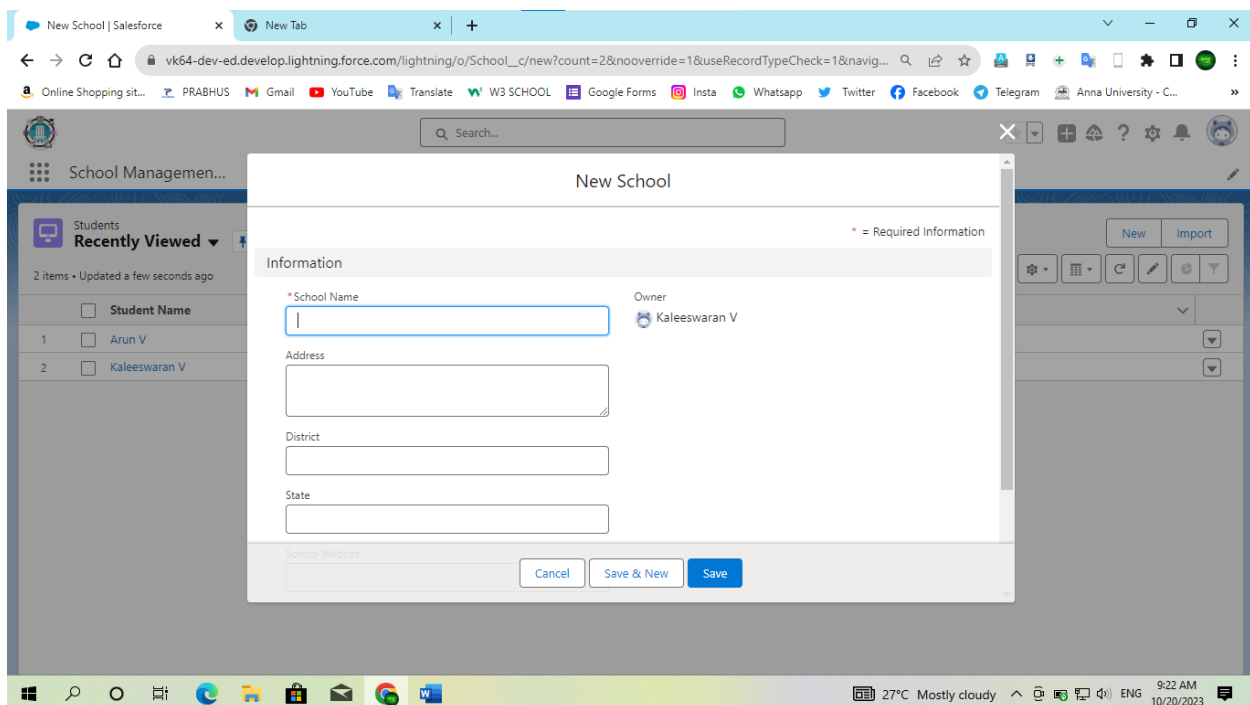
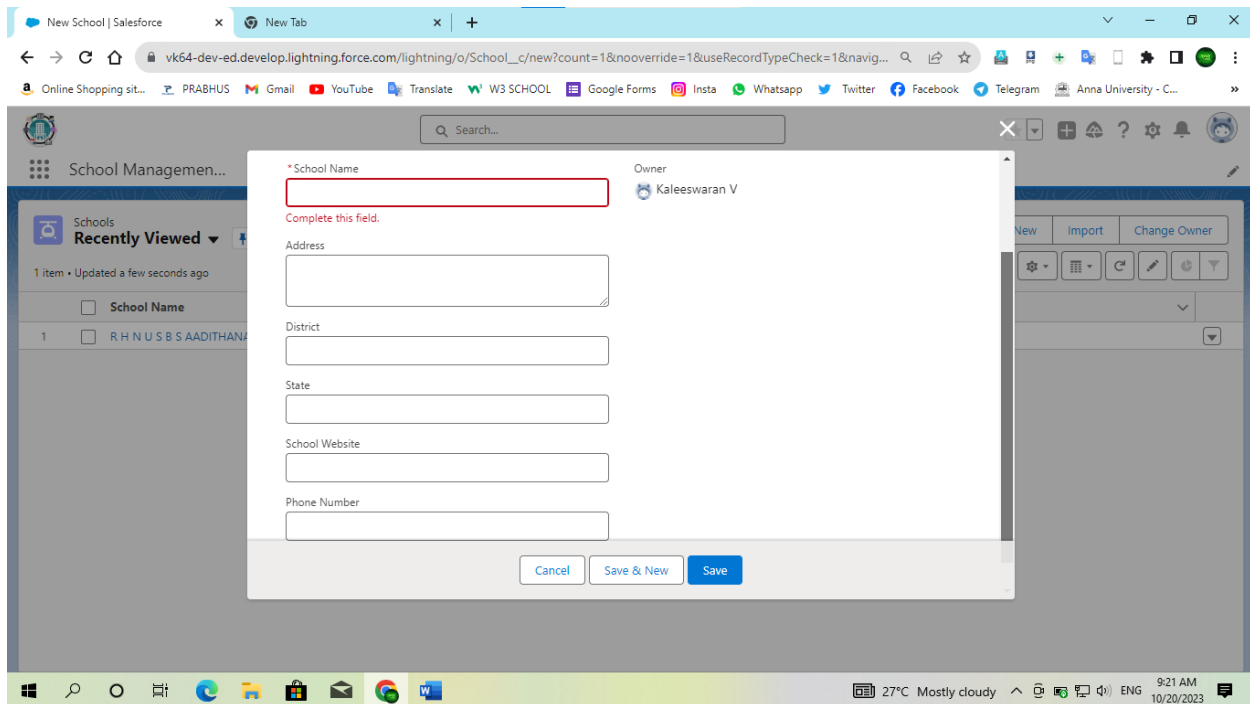
Complete this field.

Parent address

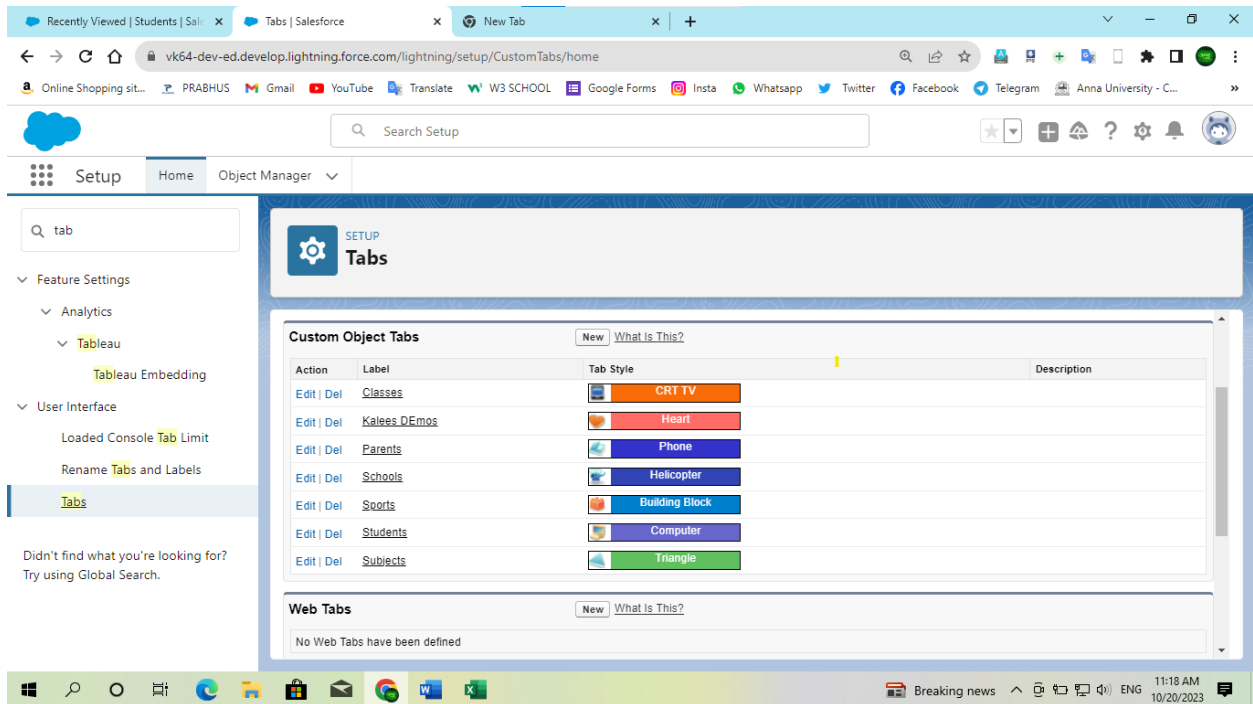
Parent Number

Cancel Save & New Save

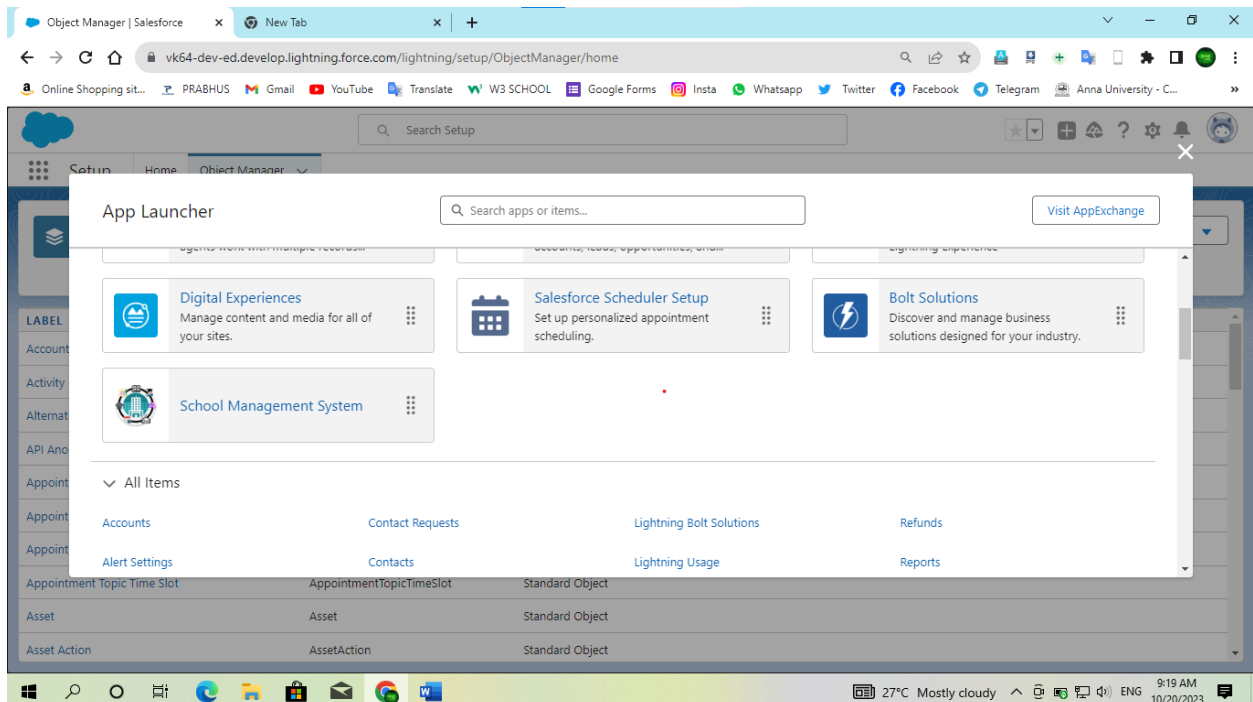
27°C Mostly cloudy 9:22 AM 10/20/2023



## Step 4 : Create the Tabs for each object(School, student, Parent)



## Step 5 : Create a Lightning App



## Step 6 : Create the School Profile

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' and a list of navigation items: Users, Profiles, and a search result for 'School Profile'. The main content area is titled 'Profile Edit School Profile' and includes a description: 'Set the permissions and page layouts for this profile.' Below this is a 'Profile Edit' form with fields for Name (School Profile), User License (Salesforce), and Description. To the right of the form is a 'Custom Profile' checkbox, which is checked. Below the form is a 'Custom App Settings' table with columns for Visible and Default. The table lists various Salesforce apps and their settings for the 'School Profile'.

	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>

## Step 7 : Create the users(Teacher , Parent , Principal)

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'users' 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 'Users' and includes a 'View: All Users' dropdown and a 'Create New User' button. Below this is a table listing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists various users, including 'Chatter Expert', 'Parents', 'Principals', 'Teachers', 'User A', 'User B', 'User Integration', 'User Security', 'V. Kaleeswaran', and 'Wheeler, Allison'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000c0ybmeaz.whylvmstfvs@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Parents	parnts	vkalees643@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Principals	prin	vkalees645@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Teachers	teac	vkalees644@gmail.com		<input type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	User A	user	vkalees641@gmail.com	User A	<input checked="" type="checkbox"/>	User A
<input type="checkbox"/> Edit	User B	user	vkalees642@gmail.com	User B	<input checked="" type="checkbox"/>	User B
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5j00000c0ybmeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5j00000c0ybmeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	V. Kaleeswaran	KV	vkalees64@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Wheeler, Allison	awhee	vkalees649@gmail.com	VP, North American Sales	<input checked="" type="checkbox"/>	Standard Platform User



<input type="checkbox"/>   <a href="#">Edit</a>	<a href="#">Parents</a>	<a href="#">parants</a>	<a href="#">vkalees643@gmail.com</a>	<input type="checkbox"/> <a href="#">School Profile</a>
<input type="checkbox"/>   <a href="#">Edit</a>	<a href="#">Principals</a>	<a href="#">prin</a>	<a href="#">vkalees645@gmail.com</a>	<input checked="" type="checkbox"/> <a href="#">School Profile</a>
<input type="checkbox"/>   <a href="#">Edit</a>	<a href="#">Teachers</a>	<a href="#">teac</a>	<a href="#">vkalees644@gmail.com</a>	<input type="checkbox"/> <a href="#">School Profile</a>

## Step 8 : Create the Permission Set for the Users

vk64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del   Clone	Principal Permission		

1-1 of 1 0 Selected

Page 1 of 1

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vk64-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del   Clone	Teacher Permission		

1-1 of 1 0 Selected

Page 1 of 1

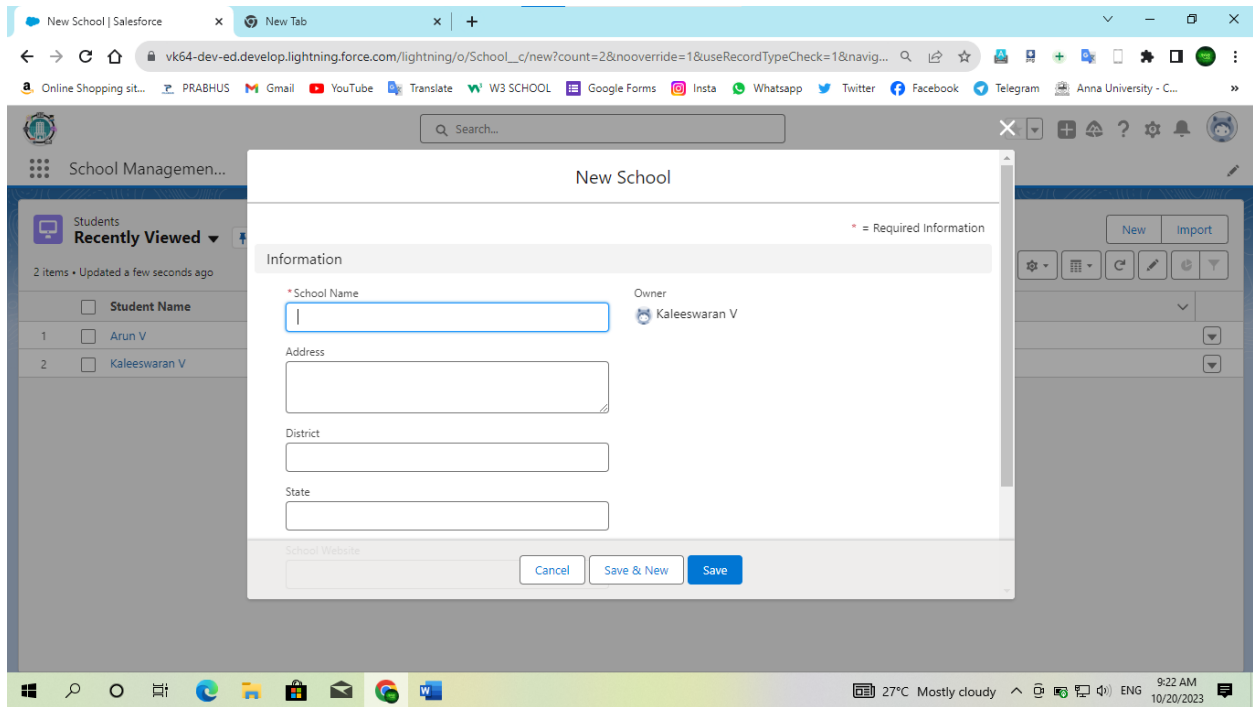
27°C Mostly cloudy 9:36 AM 10/20/2023

## Step 9 : Create Master Detail relationship

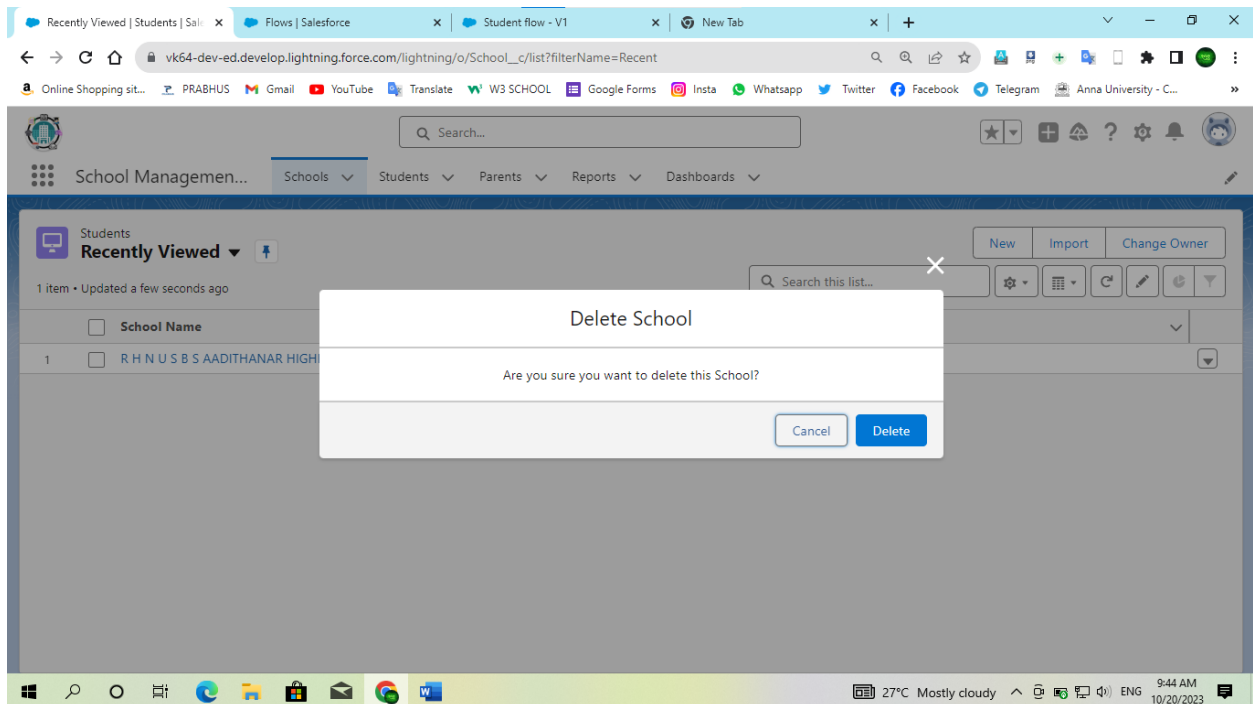
The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays the 'Fields & Relationships' configuration for the 'Student' object. It includes fields for Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Kaleeswaran V, 17/10/2023, 9:49 am), and Modified By (Kaleeswaran V, 17/10/2023, 9:49 am). The 'Master-Detail Options' section shows the 'Related To' field set to 'School' and the 'Child Relationship Name' set to 'Students'. The 'Sharing Setting' is 'Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.' The 'Lookup Filter' section indicates 'No lookup filters defined.' The 'Validation Rules' section shows 'No validation rules defined.' and a 'New' button. At the bottom, there is a 'Back To Top' link and a note 'Always show me more records per related list'.

## Step 10 : Create Records in Lightning App

The screenshot shows the Salesforce Lightning App interface for the 'Schools' object. The top navigation bar includes 'School Management...' and a dropdown menu with 'Schools' (selected), 'Students', 'Parents', 'Reports', and 'Dashboards'. The main content area displays the 'Recently Viewed' list for 'Schools'. It includes a 'New' button, an 'Import' button, and a 'Change Owner' button. Below these buttons is a search bar labeled 'Search this list...'. The list shows 1 item, updated a few seconds ago. The item is a checkbox followed by the text 'School Name' and a dropdown arrow. Below this, the list item is numbered '1' and contains the text 'R H N U S B S AADITHANAR HIGHER SECONDARY SCHOOL' with a dropdown arrow.



## Step 11 : Deleting Records



## Step 12 : Create Apex Class and Apex Trigger

The screenshot shows the Salesforce Developer Console interface. The top bar includes tabs for 'Schools with Students Repo', 'Developer Console', 'Flows | Salesforce', 'Student flow - V1', and 'New Tab'. The address bar displays the URL: `vk64-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The main workspace area is empty. An 'Open' dialog box is open, showing a list of entities. The 'Entity Type' is set to 'Triggers'. The 'Entities' list includes: AddPrimaryContact, AnimalLocator, AccountManager, ParkLocatorTest, schoolHandler, ParkServiceMock, AnimalLocatorTest, AnimalLocatorMock, and DailyLeadProcessor. The 'Related' section is empty. The 'Logs' tab is selected, showing a log entry for user 'Kaleesvaran V' in the 'Browser' application, dated '10/19/2023, 9:13:19 PM', with a 'Success' status and 'Unread' flag. The system tray at the bottom shows the date and time as '9:43 AM 10/20/2023'.

Entity Type	Entities	Related
Entity Type	Name	Namespace
Classes	AddPrimaryContact	
Triggers	AnimalLocator	
Pages	AccountManager	
Page Components	ParkLocatorTest	
Objects	schoolHandler	
Static Resources	ParkServiceMock	
Packages	AnimalLocatorTest	
	AnimalLocatorMock	
	DailyLeadProcessor	

The screenshot shows the Salesforce Developer Console interface. The top bar includes tabs for 'Schools with Students Repo', 'Developer Console', 'Flows | Salesforce', 'Student flow - V1', and 'New Tab'. The address bar displays the URL: `vk64-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The main workspace area is empty. An 'Open' dialog box is open, showing a list of entities. The 'Entity Type' is set to 'Triggers'. The 'Entities' list includes: ClosedOpportunityTrig..., AccountAddressTrigger, Internalmarks, and RestrictContactByName. The 'Related' section is empty. The 'Logs' tab is selected, showing a log entry for user 'Kaleesvaran V' in the 'Browser' application, dated '10/19/2023, 9:13:19 PM', with a 'Success' status and 'Unread' flag. The system tray at the bottom shows the date and time as '9:43 AM 10/20/2023'.

Entity Type	Entities	Related
Entity Type	Name	Namespace
Classes	ClosedOpportunityTrig...	
Triggers	AccountAddressTrigger	
Pages	Internalmarks	
Page Components	RestrictContactByName	
Objects		
Static Resources		
Packages		

## Step 13 : Create A Flow

The screenshot shows the Salesforce Flow Builder interface for a flow named 'Student flow - V1'. The flow is currently in 'Version 1: Active' state, last modified 3 days ago. The flow diagram consists of the following steps:

- Record-Triggered Flow Start** (Start event)
- Run Immediately** (Action)
- Student record creation** (Action)
- End** (End state)

The interface includes a top navigation bar with 'Flow Builder' and 'Student flow - V1' tabs. Below the navigation bar are buttons for 'Select Elements', 'Auto-Layout', 'Run', 'Debug', 'View Tests', 'Deactivate', 'Save As', and 'Save'. The bottom of the screen shows a Windows taskbar with various application icons and a system tray displaying '27°C Mostly cloudy' and the time '9:46 AM 10/20/2023'.

## Step 14 : Create Reports

The screenshot shows the Salesforce Reports page for a report titled 'Schools with Students Report'. The report is currently in 'Enable Field Editing' mode. The report displays a table with 2 records, showing School Name and Student Name.

	School: School Name	Student: Student Name
1	R H N U S B S AADITHANAR HIGHER SECONDARY SCHOOL	Kaleeswaran V
2	R H N U S B S AADITHANAR HIGHER SECONDARY SCHOOL	Arun V

The interface includes a top navigation bar with 'Schools with Students Report' and 'Lightning Experience' tabs. Below the navigation bar are buttons for 'Enable Field Editing', 'Add Chart', 'Edit', and 'View Tests'. The bottom of the screen shows a Windows taskbar with various application icons and a system tray displaying '27°C Mostly cloudy' and the time '9:25 AM 10/20/2023'.

