

Project Documentation and Report:

SHORT TERM INTERNSHIP ON SALES FORCE

Project Title: Creation Of An Application For School Management-ADMIN – (Short-Term)

Industry Mentor:

Faculty Mentor: S. Asif Alisha

Team ID: [LTVIP2023TMID10618](#)

Team Size: 5

Team Leader: BEDADALA NANDA KUMAR REDDY

Team Members:

- 1.G Abith Shyam Sujan
- 2.Shaik Mohammad Asad
- 3.Syed Mohammed Sami
- 4.C Sai Purshotham Reddy

PROJECT REPORT ON

Creation Of An Application For School Management

ADMIN - (Short-Term)

Skills Required:

Salesforce Developer

Project Description:

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.

1. Introduction

Creating a developer org in salesforce.

Go to developer.salesforce.com

Click on sign up.

On the sign up form, enter the following details

- a. First name & Last name – B.NANDA KUMAR REDDY
- b. Email – nandakumarbedadala@gmail.com
- c. Role - ADMIN
- d. Company – Sree Vidyanikethan Degree College
- e. Country - India

f. Postal Code - 517502

g. Username - nandakumarbedadala@gmail.com

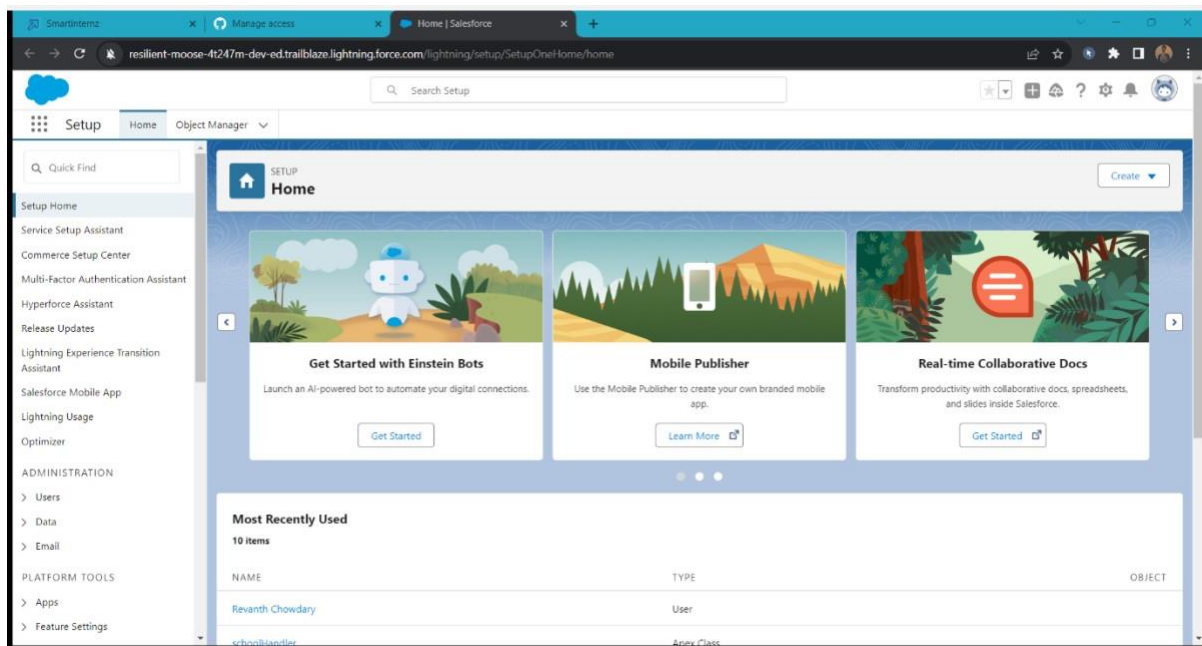
Account Activation

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.



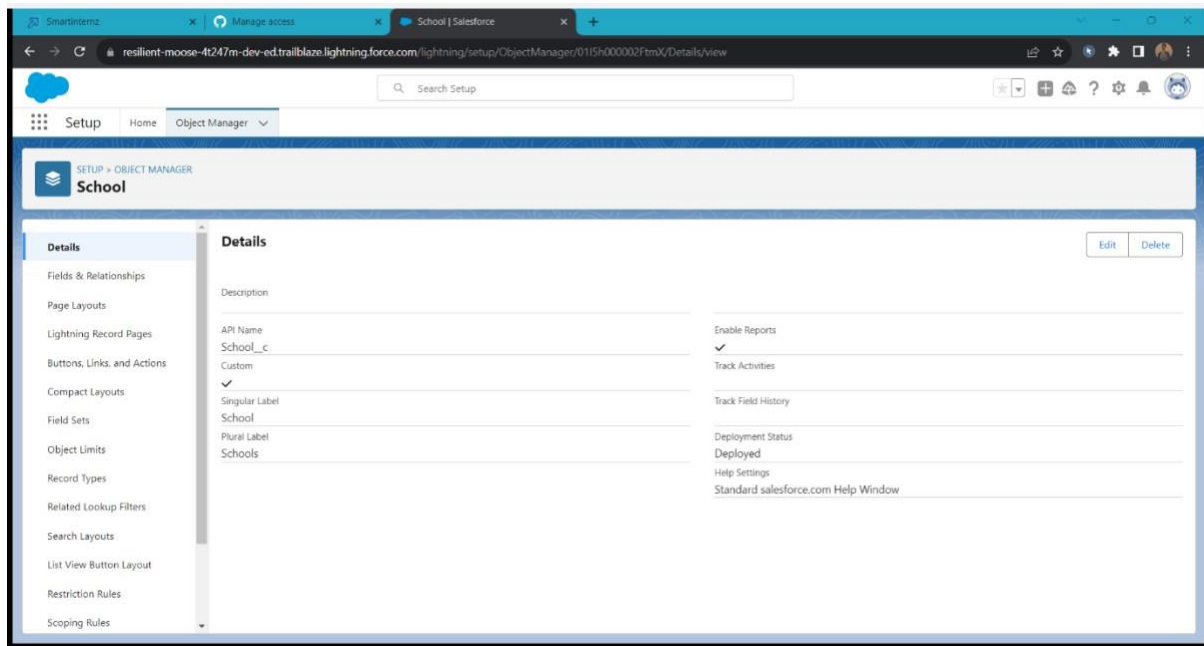
2. Object

Creation Of School Object Creation Of Objects For School Management

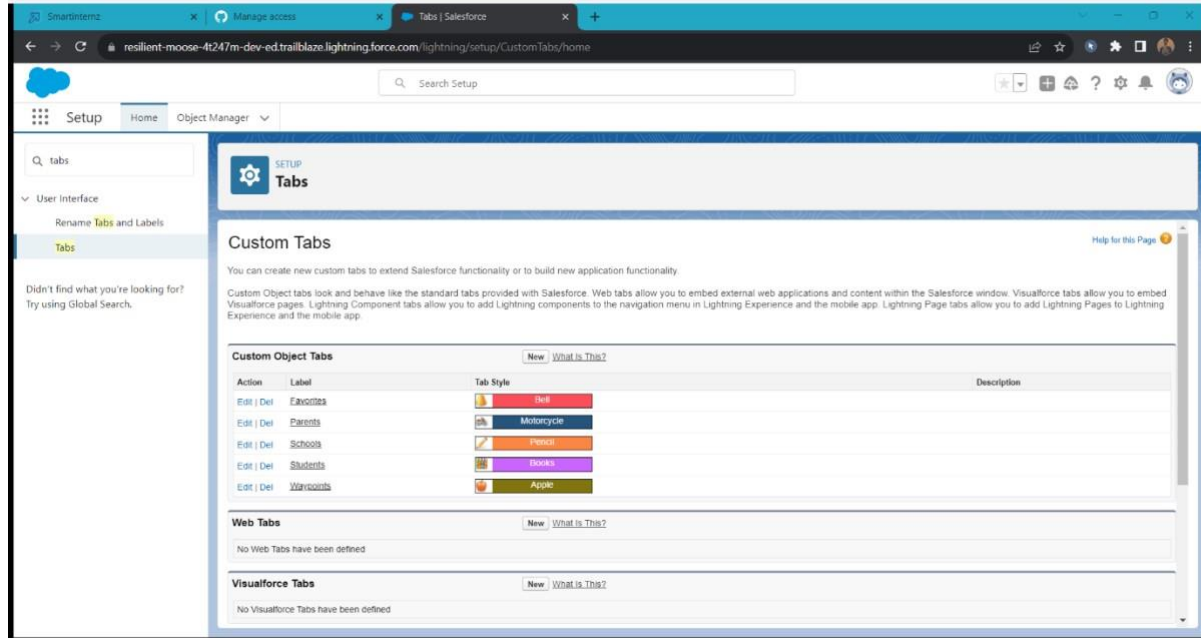
For this school management we need to create 3 objects School, Parents and Student. The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: School
6. Plural Label: Schools
7. Record Name: School Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox 10. Click Save.



Now create a custom tab. Click the Home tab.



Create Student Object

1. Click on the gear icon and then select Setup.
 2. Click on the object manager tab just beside the home tab
 3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:
 - Label: Student
 - Plural Label: Students
 - Record Name: Student Name
 - Check the Allow Reports checkbox • Check the Allow Search checkbox
 - Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

Create Parent Object

Click on the gear icon and then select Setup.

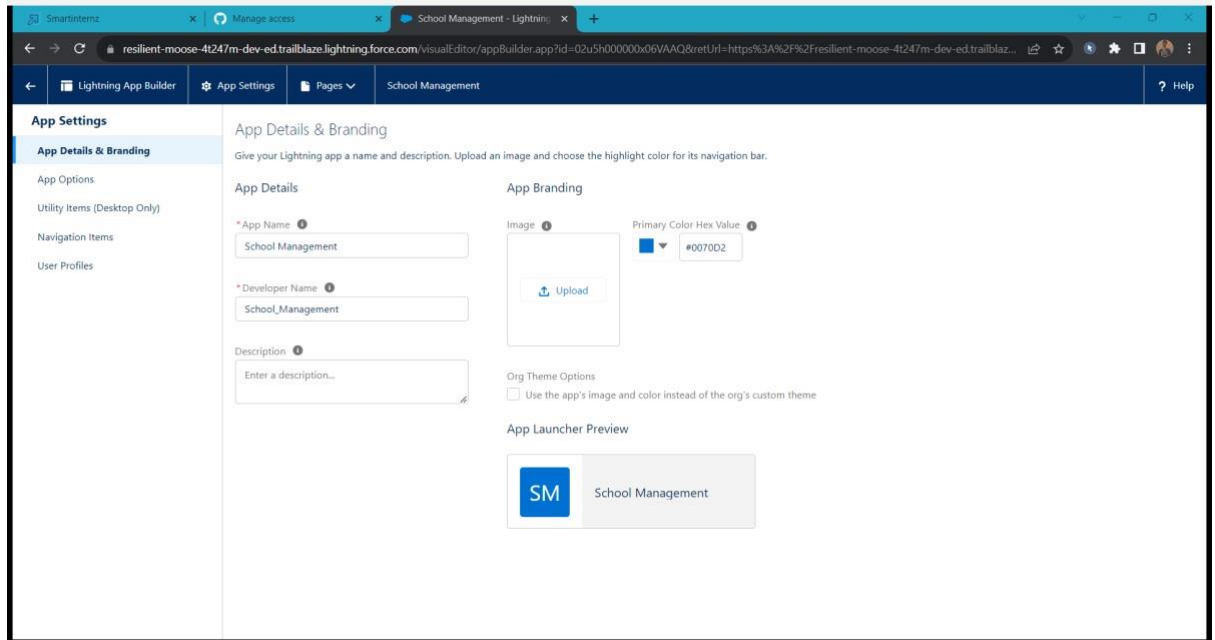
1. Click on the object manager tab just beside the home tab.
 2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- On the Custom Object Definition page, create the object as follows:
 - Label: Parent
 - Plural Label: Parents
 - Record Name: Parent Name
 - Check the Allow Reports checkbox • Check the Allow Search checkbox
 - Click Save.

3.Lightning App

Create The School Management App

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.



4.Fields And Relationship

Creation Of Fields For The School Objects

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text Area as the Data Type, click Next.
7. For Field Label, enter Address.
8. Click Next, Next, then Save & New.
9. Follow steps 1 to 3 and create two more Text type field - District & State.
10. Create URL type field & give School website as the field lab

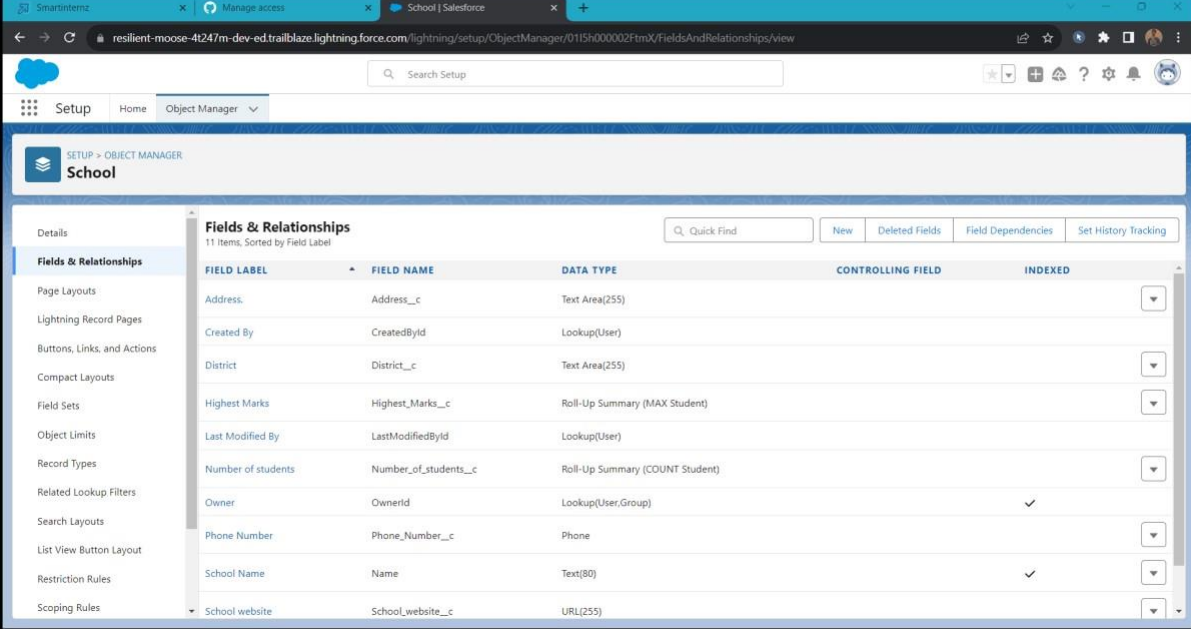
Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type.

Let's see this

Note- Follow above steps 1 to 5 to create field and then follow below steps

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.



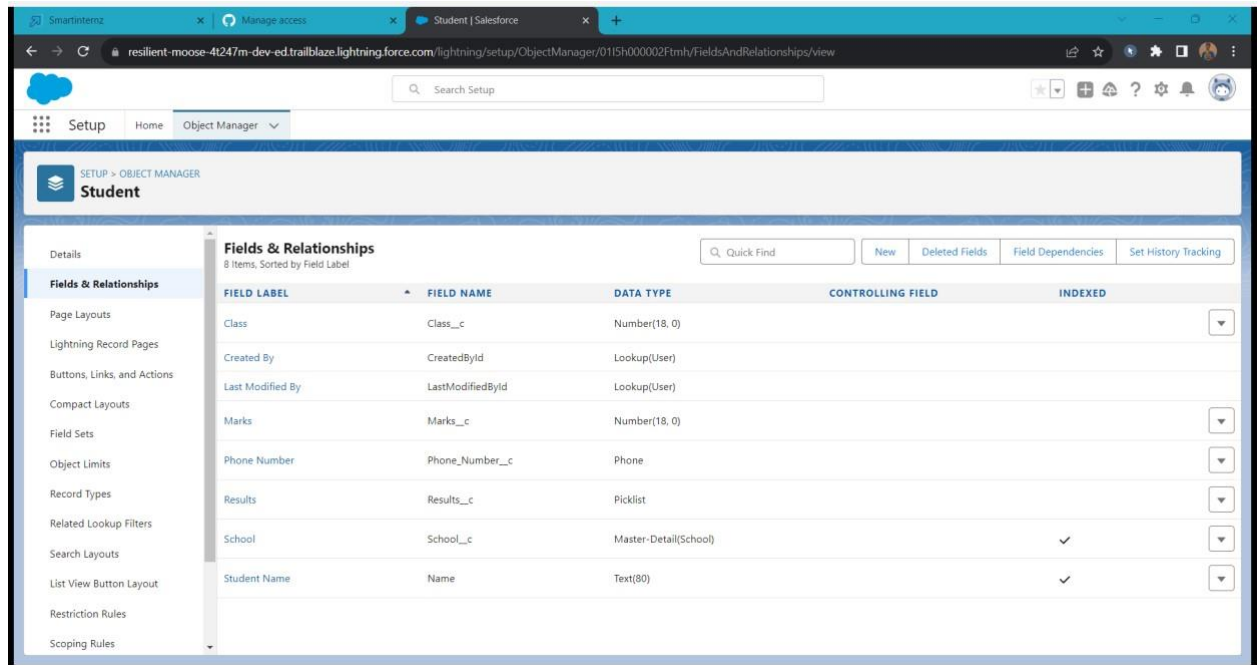
The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 11 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Address, Created By, District, Highest Marks, Last Modified By, Number of students, Owner, Phone Number, School Name, and School website.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓
Phone Number	Phone_Number_c	Phone		
School Name	Name	Text(80)		✓
School website	School_website_c	URL(255)		

Creation Of Fields For The Student Objects

Note- Follow above steps 1 to 5 to create field and then follow below steps

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New



Let's create a master-detail relationship with School object

Note- Follow above steps 1 to 5 to create field and then follow below steps

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
5. Click Next, Next, Next and Save.

Let's create a PickList field:

Note- Follow above steps 1 to 5 to create field and then follow below steps

1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
Pass
6. Pass

7. Fail
8. Click Next, Next, then Save & New

Note- Follow above steps 1 to 5 to create field and then follow below steps

1. Select the Number as the Data Type, then click Next.
2. For Field Label, enter Class.
3. Click Next, Next, then Save & New
4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

Let's create Roll-up summary fields on School Object to calculate the number of students

1. Click gear icon Select Setup, This launches Setup in a new tab. 2. click Object Manager
3. Select School.
4. Click Fields & Relationships
5. Click New.
6. Select the Roll-up summary field as data type
7. Enter the field label as Number of students
8. Click Next
9. Then select the master object summarized as students 10. Select count as roll-up and then click Next, Next and save.

Create one more rollup summary field-

- From Setup, click Object Manager and select School.
- Click Fields & Relationships, then New.
- Select the Roll-up summary field as data type
- Enter the field label as Highest Marks
- Click Next
- Then select the master object summarized as students and then select Max as roll-up and then select Marks as field to aggregate.
- click Next, Next and save.

Creation Of Fields For The Parent Objects

- Select the Text Area as the Data Type, then click Next.
- For Field Label, enter Parent Address.
- Click Next, Next, then Save & New.
- Select the Phone as the Data Type, then click Next.
- For Field Label, enter Parent Number.
- Click Next, Next, then Save & New

5.Profile

Creation On Profile

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

The screenshot shows the Salesforce Setup interface for the 'School Profile'. The left sidebar contains a search bar and a list of items including 'Profiles'. The main content area displays the 'School Profile' details, including a list of permissions and page layouts.

Profile Detail

Name	School Profile
User License	Salesforce
Description	
Created By	Nanda kumar Reddy, 15/10/2023, 5:38 pm
Modified By	Nanda kumar Reddy, 15/10/2023, 5:42 pm

Page Layouts

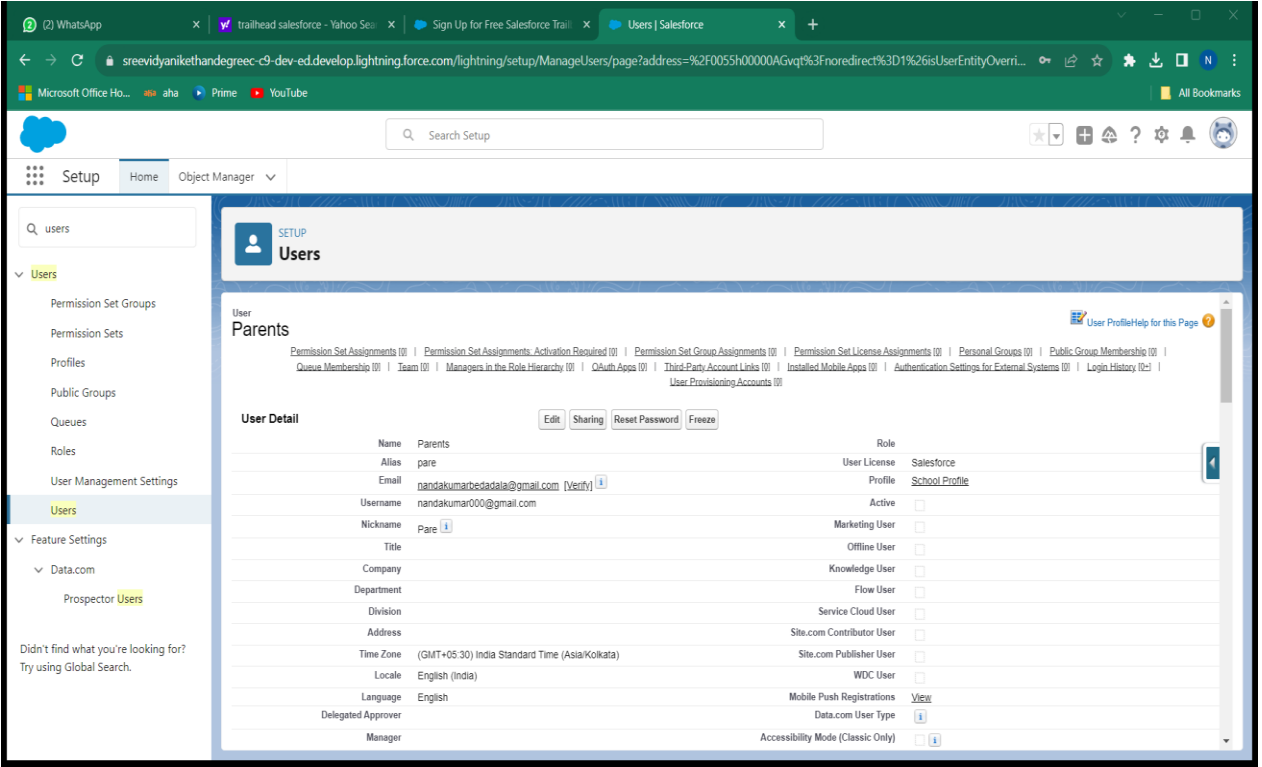
Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned	Operating Hours Layout
Home Page Layout	DE Default	Opportunity Layout
Account	Account Layout	Opportunity Product Layout

6.Users

Creating A User

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name Parents and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as salesforce.
6. 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.
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.
9. Similarly follow the above steps and create 2 users as Teachers and principals.

10.



The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a search bar with 'users' entered and a list of setup categories including Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Users' and shows the details for a user named 'Parents'. The user's email is 'nandakumarbedadaia@gmail.com' and the username is 'nandakumar00@gmail.com'. The user license is 'Salesforce' and the profile is 'School Profile'. The user is currently inactive. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, and Manager. The 'Role' section includes checkboxes for various roles: Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, and Accessibility Mode (Classic Only).

User Detail		Role
Name	Parents	
Alias	pare	User License: Salesforce
Email	nandakumarbedadaia@gmail.com [Verify]	Profile: School Profile
Username	nandakumar00@gmail.com	Active: <input type="checkbox"/>
Nickname	Pare	Marketing User: <input type="checkbox"/>
Title		Offline User: <input type="checkbox"/>
Company		Knowledge User: <input type="checkbox"/>
Department		Flow User: <input type="checkbox"/>
Division		Service Cloud User: <input type="checkbox"/>
Address		Site.com Contributor User: <input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User: <input type="checkbox"/>
Locale	English (India)	WDC User: <input type="checkbox"/>
Language	English	Mobile Push Registrations: <input type="checkbox"/>
Delegated Approver		Data.com User Type: <input type="checkbox"/>
Manager		Accessibility Mode (Classic Only): <input type="checkbox"/>

7.Permission Sets

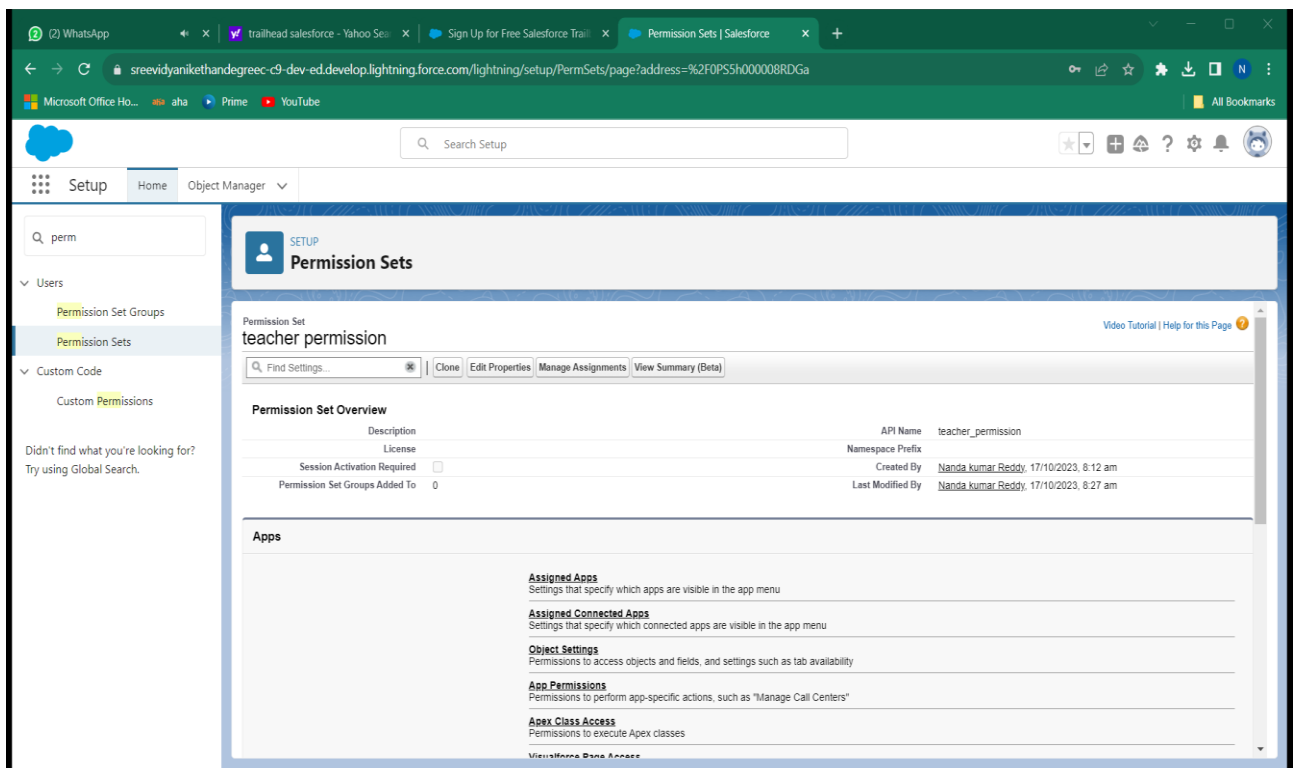
Permission Sets 1

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 create and edit permissions to all 3 custom objects (By click open the object)
5. Click on manage assignment
6. Click on add assignment.
7. Click on Teacher (user), Next, Assign.

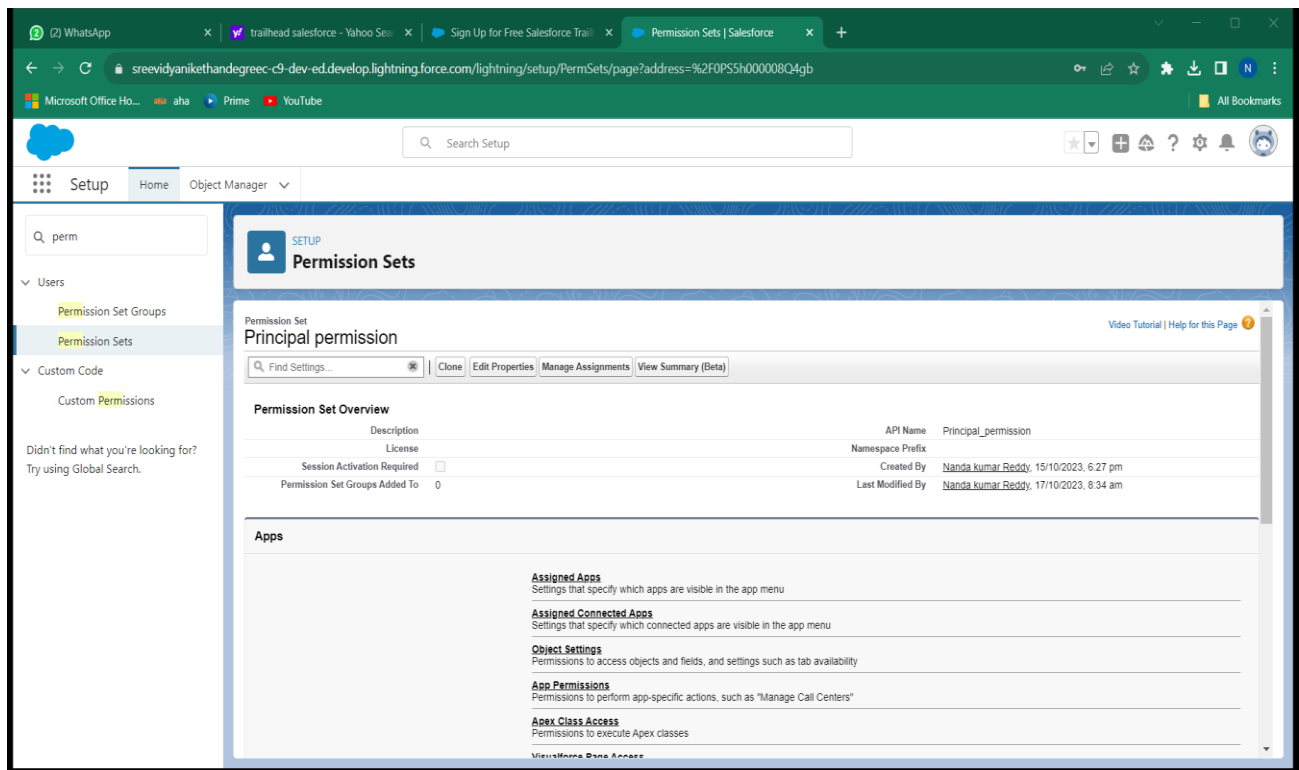
Similarly, follow the above steps for the permission set 2.

Permission Sets 2

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.



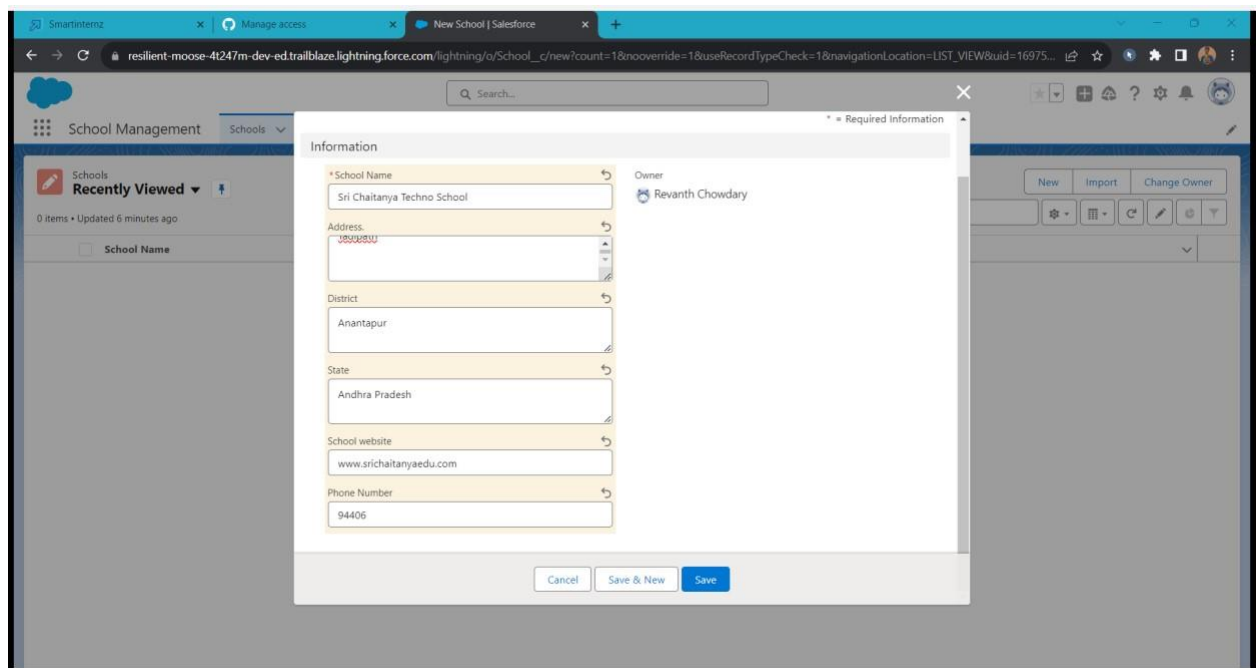
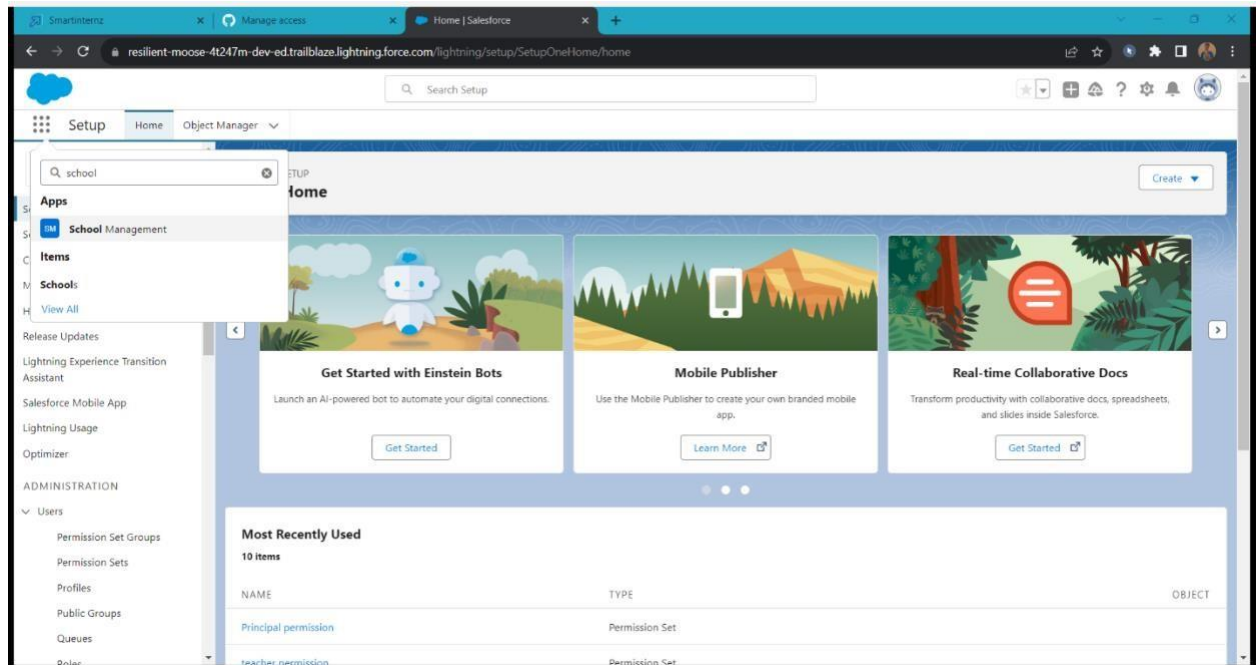
3. Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the all 3 custom objects and assign them to the Principal user.



8.User Adoption

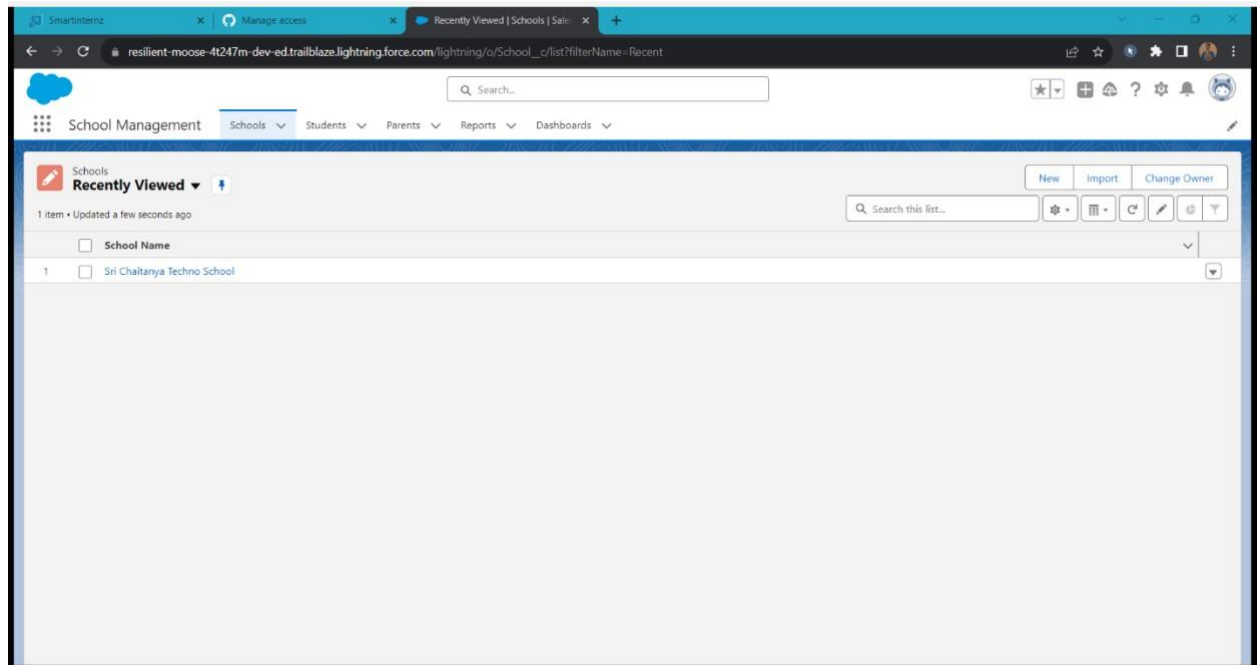
Create Record (School)

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)

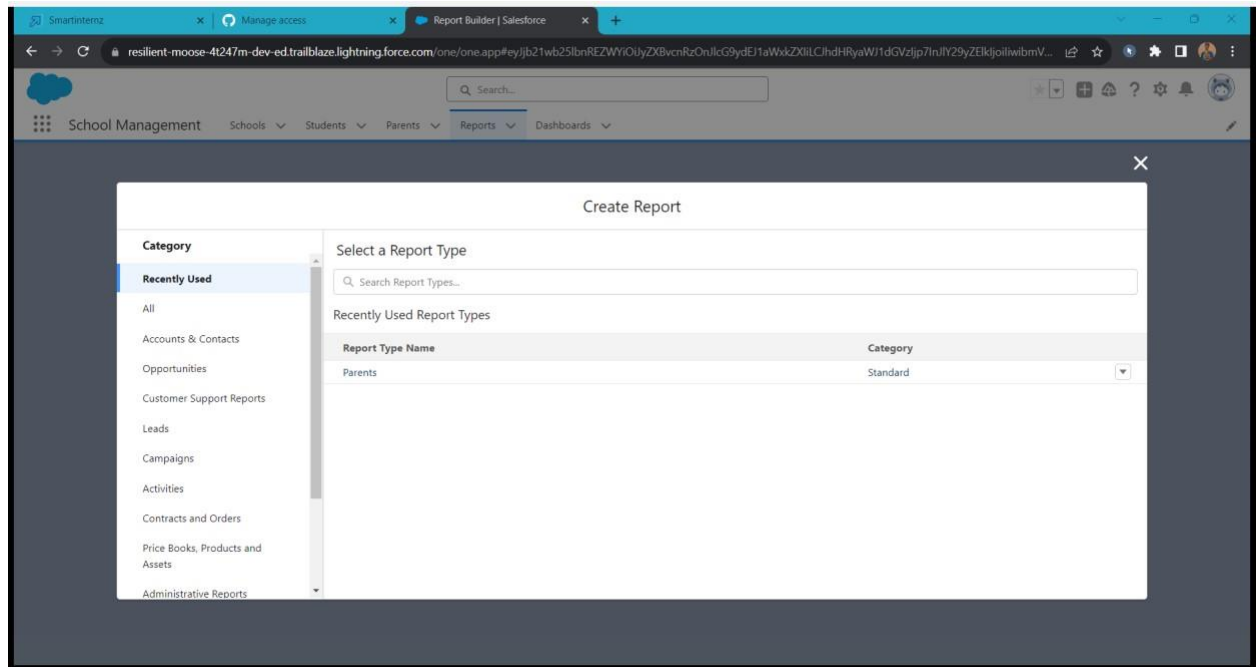
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

9.Reports

Create Report

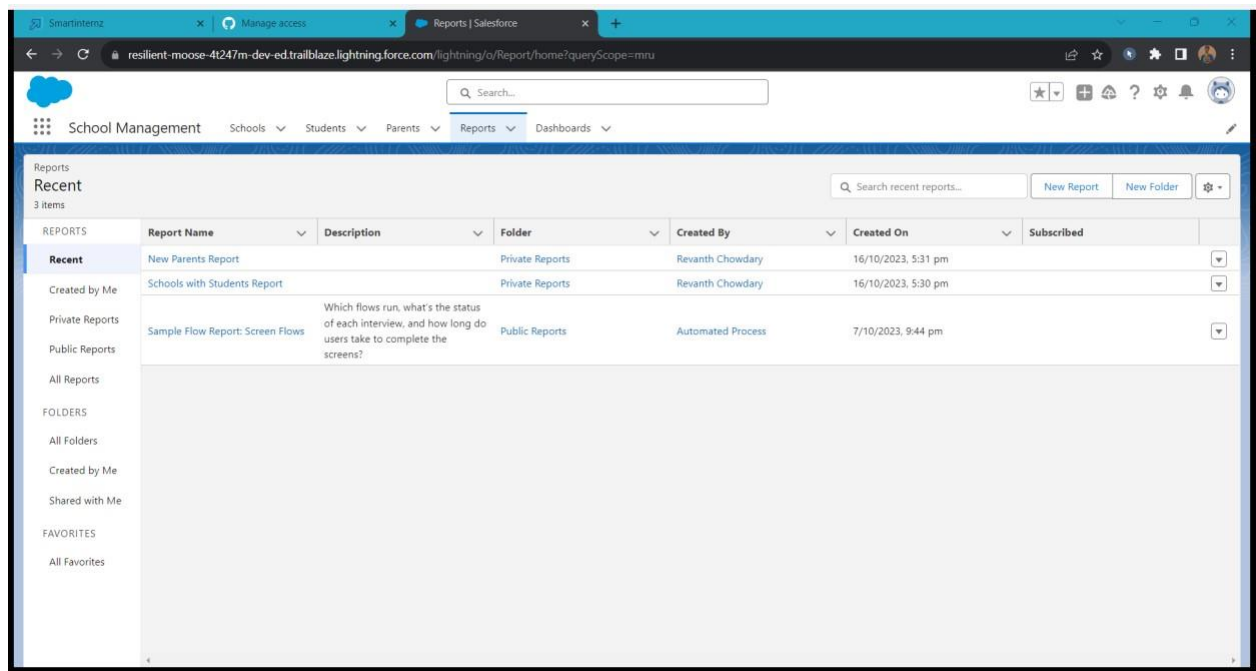
1. In School Management App click Reports tab.
2. Click New Report.
3. Select the report type as School with students and parents for the report.
4. Click start report.
5. Customize your report, then save and run
6. Give report name – Schools with Students Report
7. Click Save

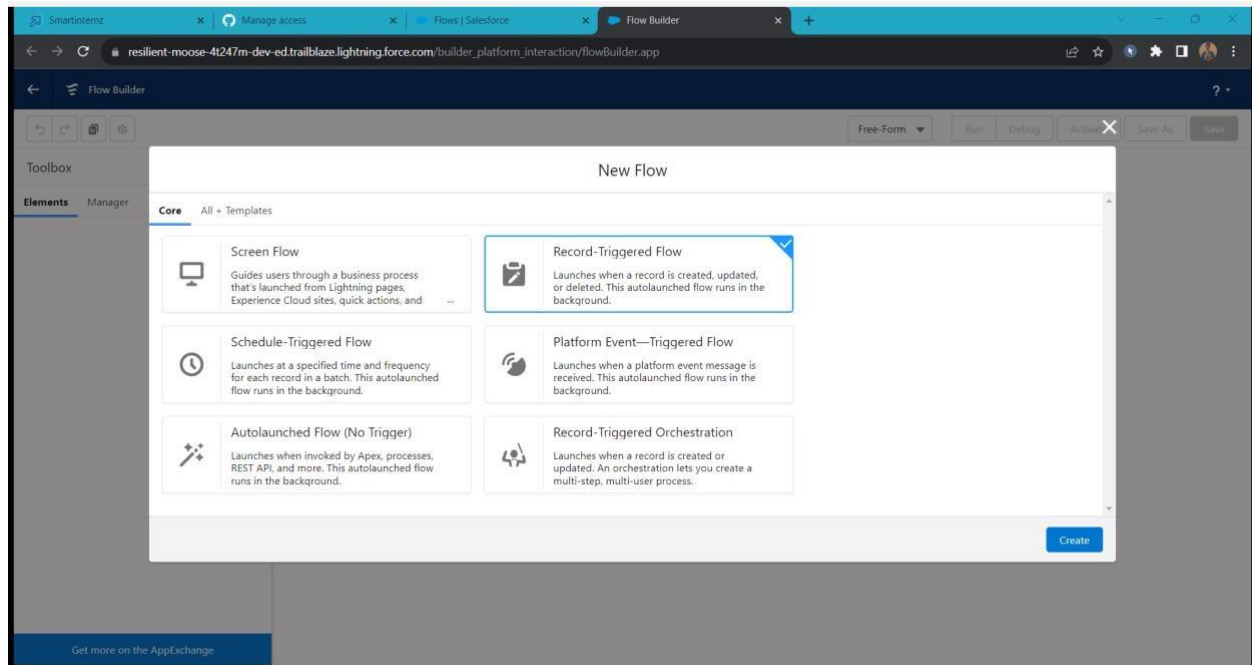
- NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).



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





In the search bar type student and click done.

Enter the following details

Label:Student Record Creation

Api Name:Student_Record_Creation(Auto-pupulated)

Body: Hi {!\$Record.Name} , we are happy to inform you that you have joined in our
{!\$Record.school__r.Name}.

Subject: Record Creation

Recipient email Address:{!\$Record.Email__c}

....THE END....