

# PROJECT REPORT ON

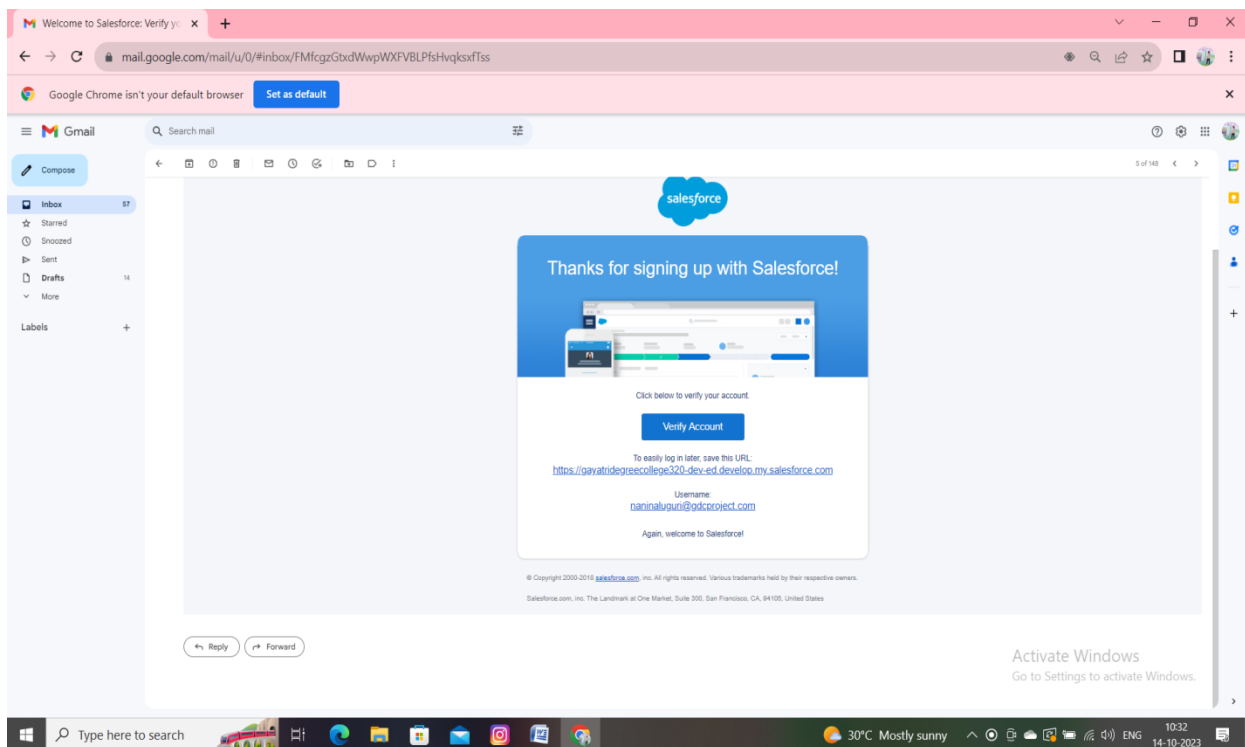
## Creation Of An Application For School Management

### 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 -CreatingDeveloper Org

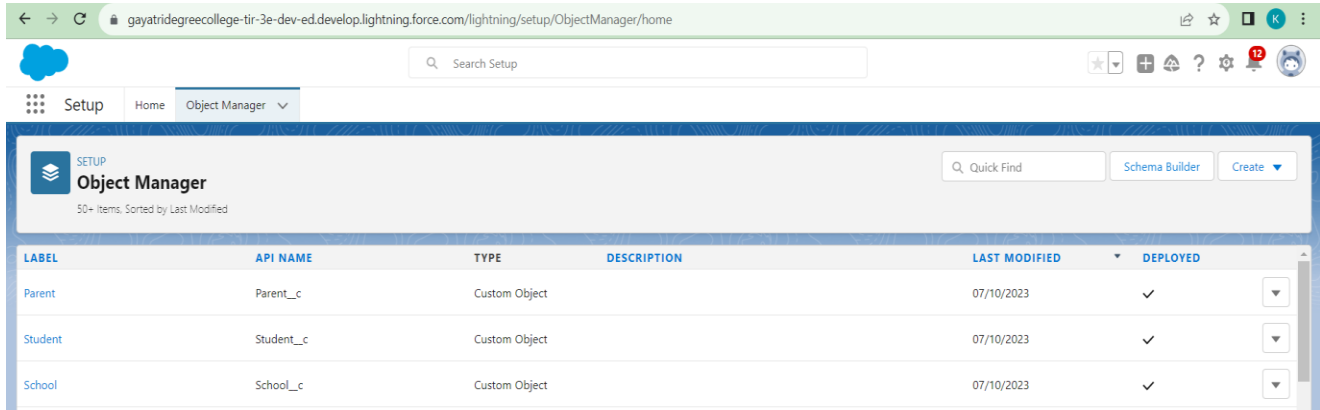
- Go to developer.salesforce.com
  - ❖ Click on sign up.
  - ❖ On the sign up form, enter the following details
  - ❖ First name & Last name – Nani Naluguri
  - ❖ Email – naninaluguri@gmail.com
  - ❖ Role –SALESFORCE ADMIN
  - ❖ Company – GAYATRI DEGREE COLLEGE – TIRUPATI
  - ❖ Country - India
  - ❖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



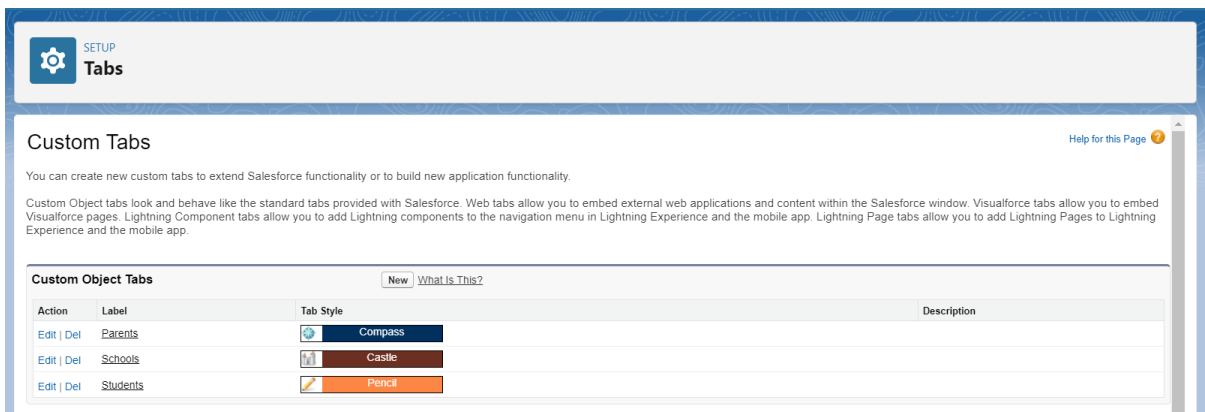
## Milestone 02 –Creation of Object

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.

### ➤ Custom Objects: School, Student, Parent.



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

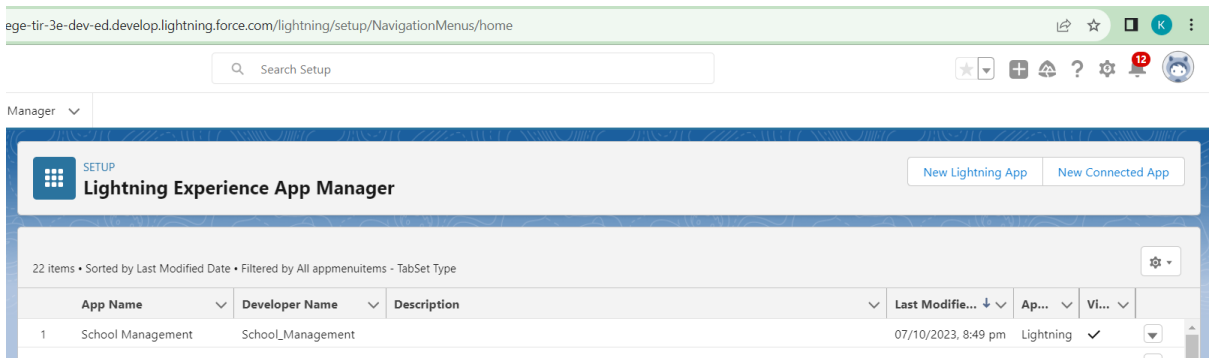


## Milestone 03 - Lightning App

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:

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

Search Setup

SETUP > OBJECT MANAGER

### Student

Details

**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)		
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)		✓

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 in Parent object:

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Parent

Details

**Fields & Relationships**

6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

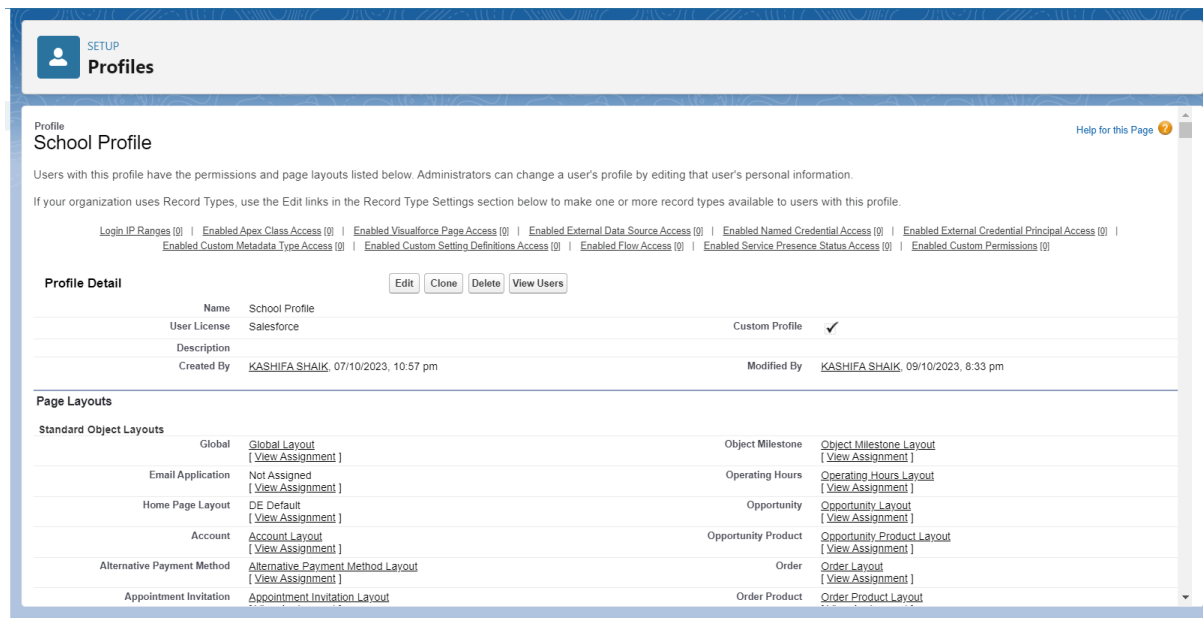
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types

## 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.



## 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 naraiah 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 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.

#### ❖ 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](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Basha Sardar	sbash	sardarasha157@0910gmail.com		<input type="checkbox"/>	School Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d5h000008jvnjea2_favobn8njjz@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	mam_Neeraja	nmam	neeraja123@0910gmail.com		<input checked="" type="checkbox"/>	School Profile
<a href="#">Edit</a>	Podipattu_Madhu_Sudhan	mpodi	p.madhusudhan@gmail.com		<input type="checkbox"/>	School Profile
<a href="#">Edit</a>	SHAIK_KASHIFA	KSHAI	kashifashaik2003@gdcproject.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@00d5h000008jvnjea2.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00d5h000008jvnjea2.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

## 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.

**SETUP Permission Sets**

**teacher permission** [Video Tutorial](#) | [Help for this Page](#)

[Find Settings...](#) [Clone](#) [Edit Properties](#) [Manage Assignments](#)

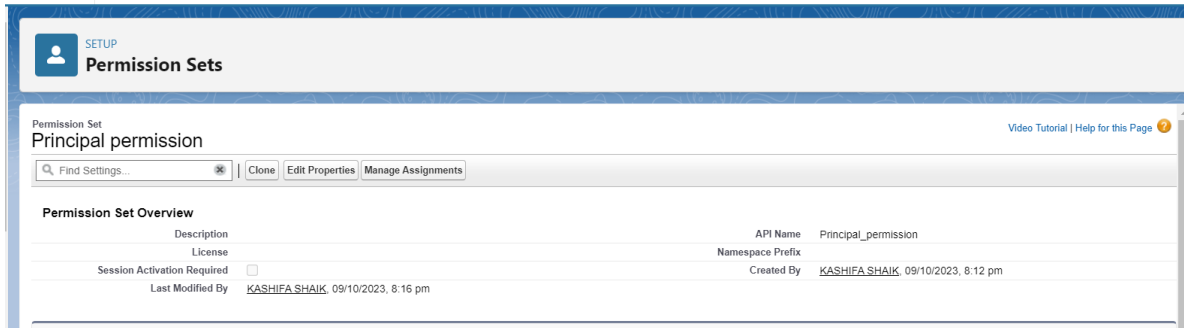
**Permission Set Overview**

Description	API Name	teacher_permission
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	KASHIFA SHAIK, 09/10/2023, 8:05 pm
Last Modified By	KASHIFA SHAIK, 09/10/2023, 8:14 pm	

### ➤ Permission Sets 2

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

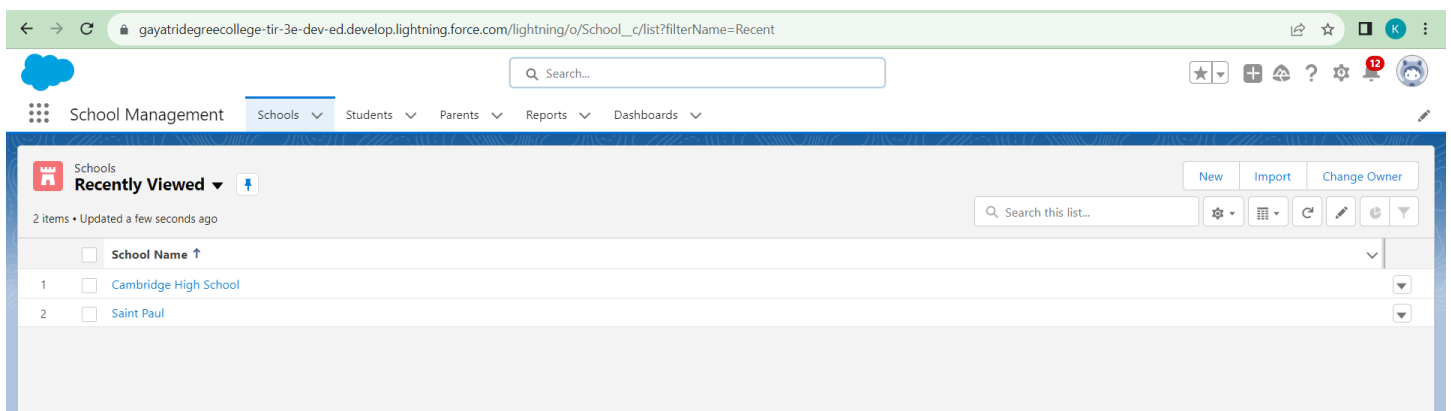
3. Give the name of the Permission set name as Principal permission.
4. Under the object settings give the view create and edit permissions to School, student, and teacher custom objects.
5. Click on manage assignment
6. Click on add assignment.
7. Click on Neeraja mam, Next, Assign.



## Milestone 08 - User Adoption

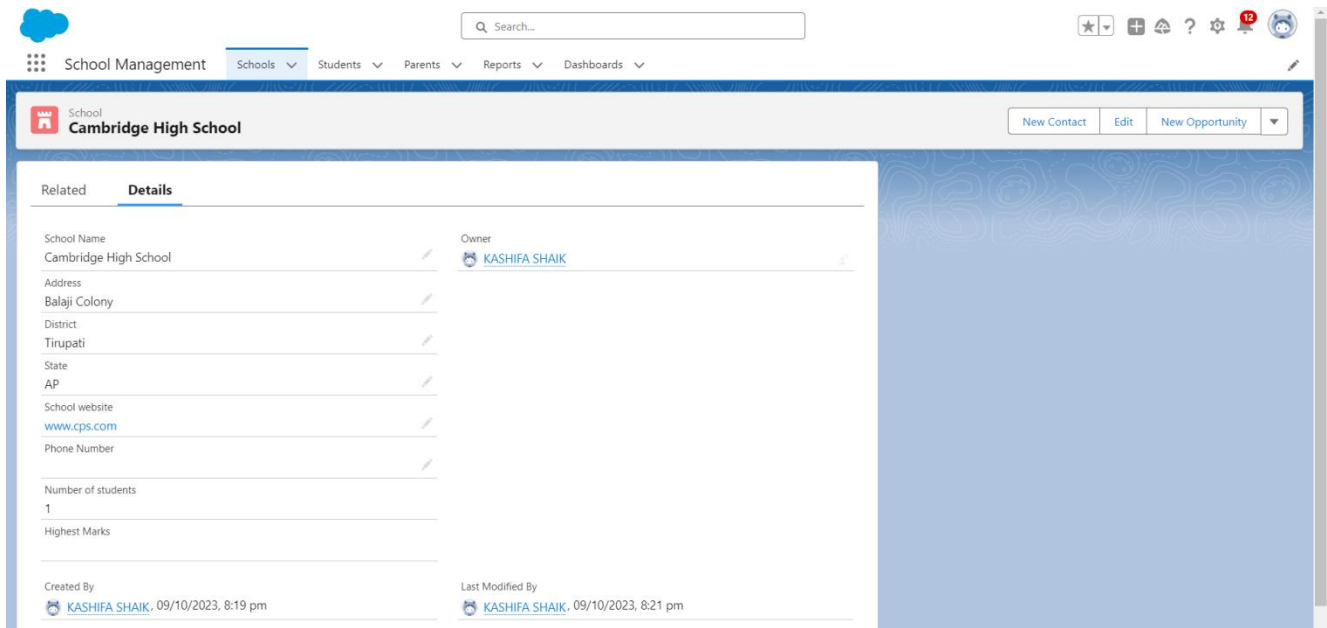
### ➤ Create Record (School)

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.



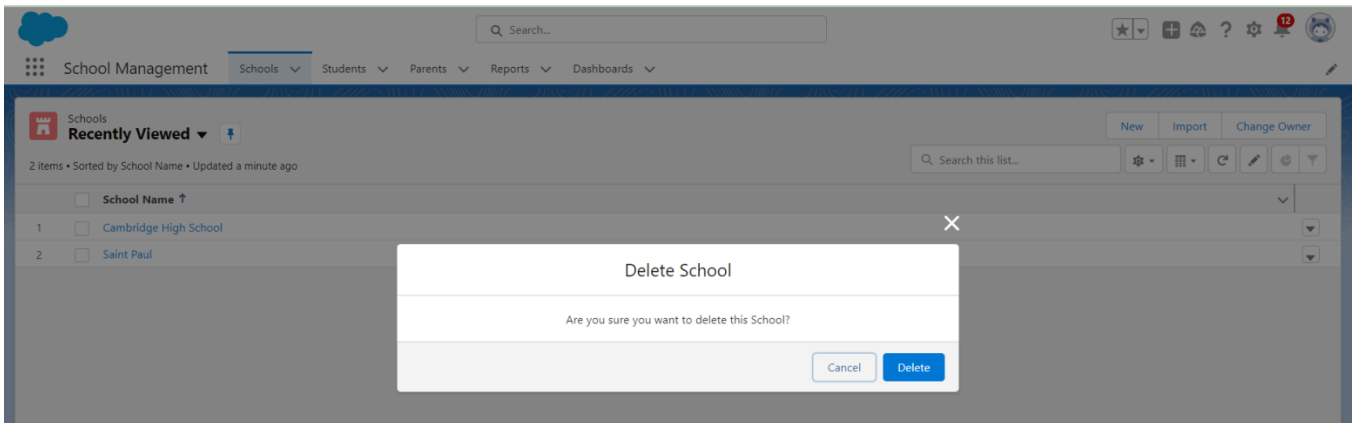
### ➤ View Record (School)

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





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School Management

Schools

Students

Parents

Reports

Dashboards

Reports

Recent

2 items


New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Schools with Students Report		Private Reports	KASHIFA SHAIK	9/10/2023, 8:25 pm	<div></div>
Created by Me	New Parents Report		Private Reports	KASHIFA SHAIK	9/10/2023, 8:26 pm	<div></div>
Private Reports						

- **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.



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School Management

Schools

Students

Parents

Reports

Dashboards

Report: Schools with Students

New Schools with Students Report

Enable Field Editing

Add Chart

▼

↺

Edit

▼

Total Records

1

	School: School Name	Student: Student Name
1	Cambridge High School	Kashifa

END