

# PROJECT REPORT ON

## Creation Of An Application For School Management

### Introduction:

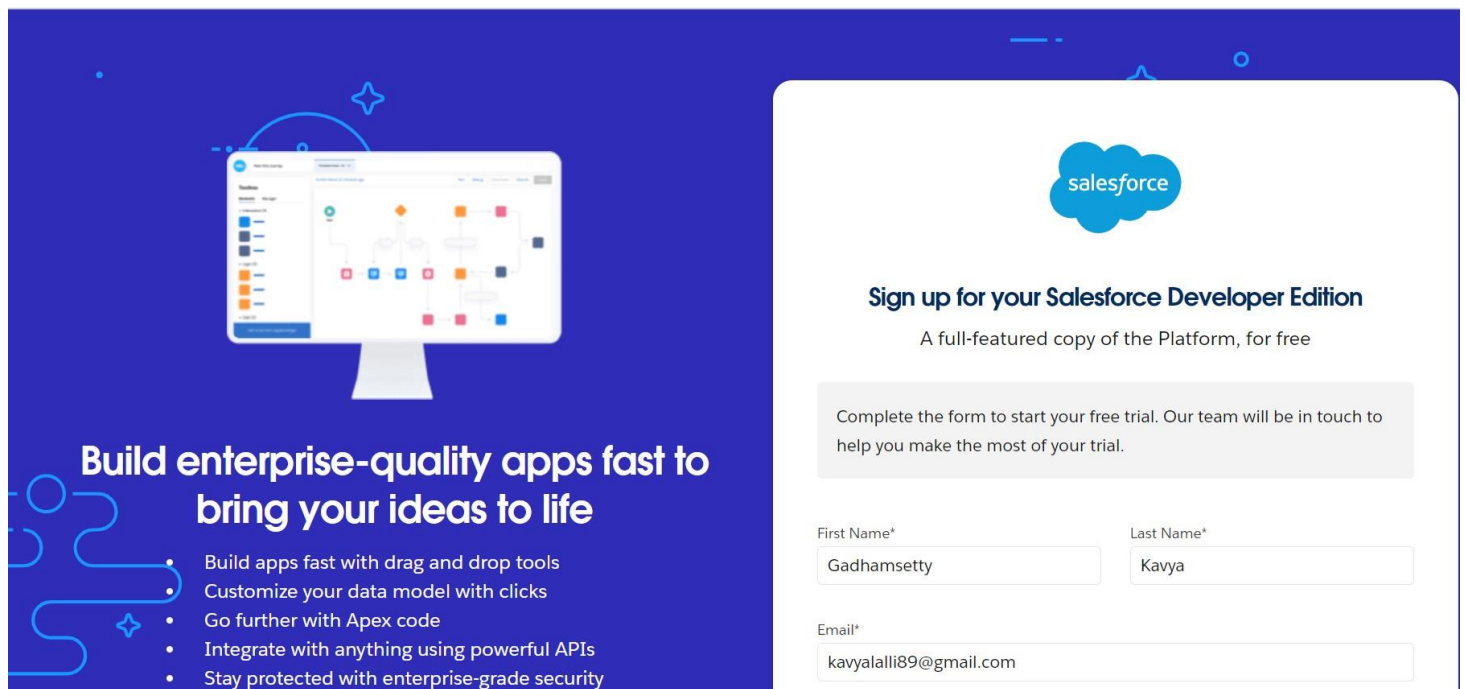
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in crosstechnology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

### Milestone 01 –Creating Admin Org ☐

Go to [developer.salesforce.com](https://developer.salesforce.com) ☐

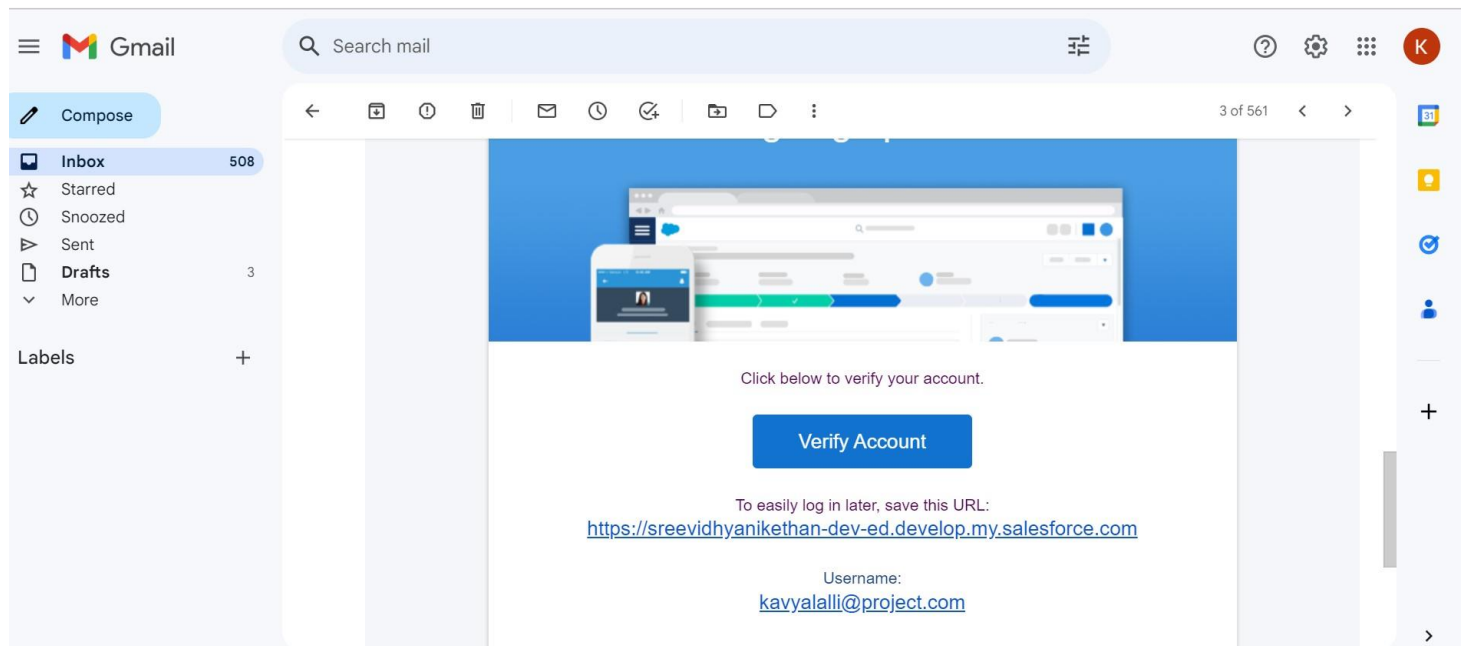
Click on sign up.

- ☐ On the sign up form, enter the following details
- ☐ First name & Last name – Kavya Gadhamsetty
- ☐ Email – kavyalalli89@gmail.com
- ☐ Role –SALESFORCE ADMIN
- ☐ Company – Sree Vidhyanikethan-Rangampeta
- ☐ Country - India
- ☐ Postal Code – pin code 517501
- ☐ Username – kavyalalli@gdcproject.com



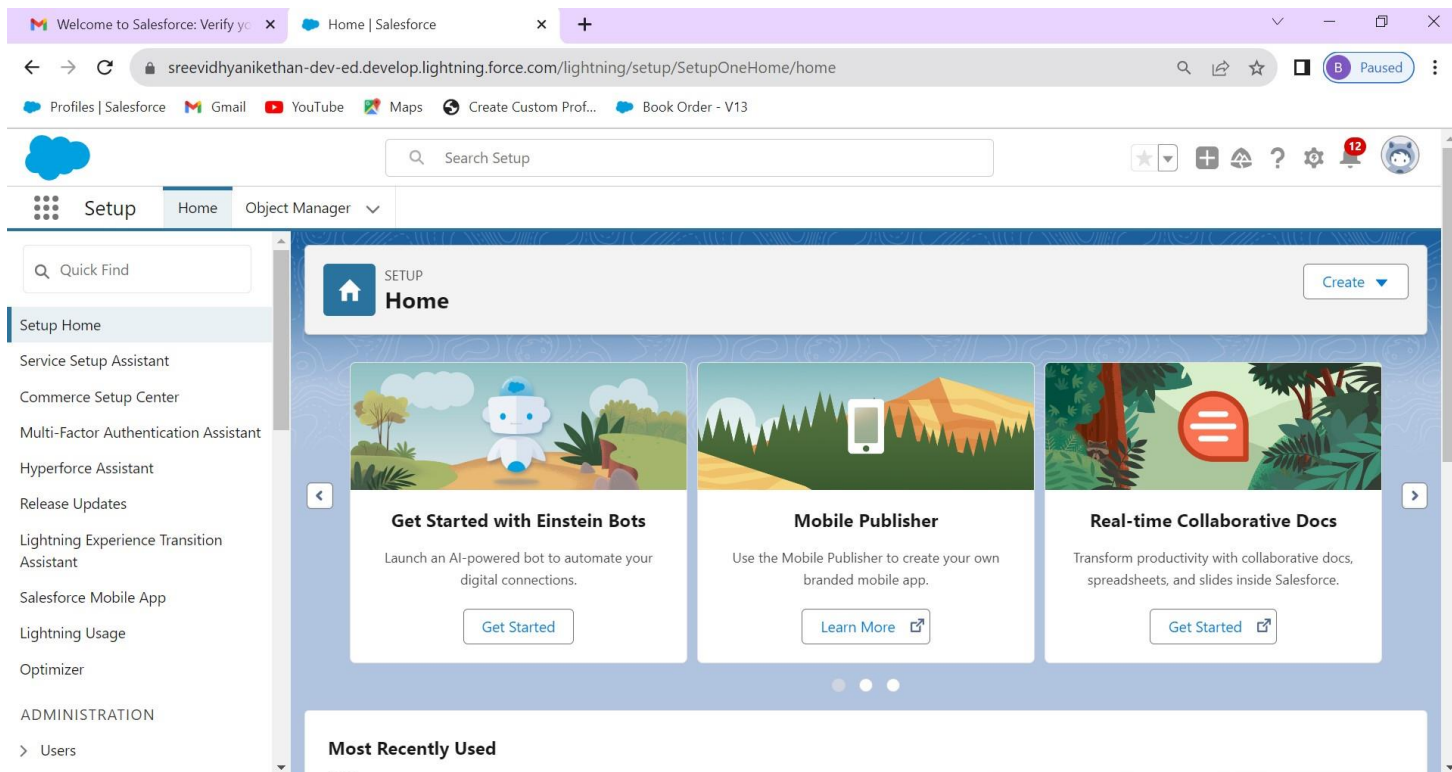
### Account Activation

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>



Username

kavyalalli@project.com

Password

.....|

Log In

☐ Remember me

[Forgot Your Password?](#)

[Use Custom Domain](#)

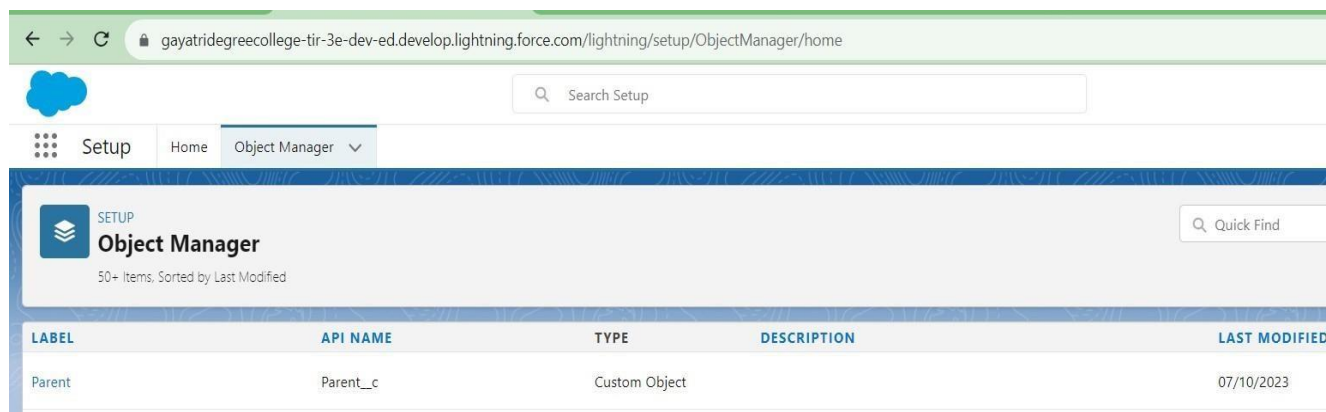
Not a customer?

[Try for Free](#)

## 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.

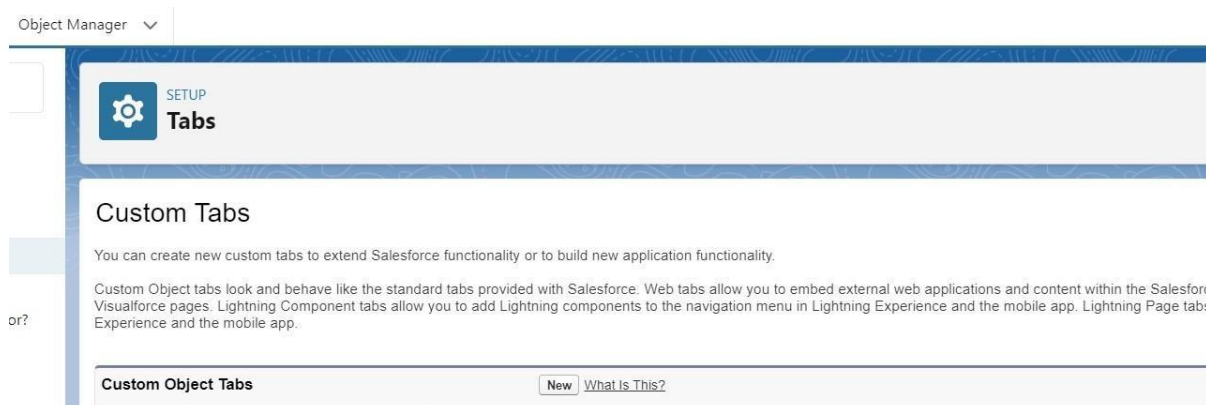
- ❑ Custom Objects: School, Student, Parent.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the 'Object Manager' section is titled 'Object Manager' with a sub-header '50+ Items, Sorted by Last Modified'. A table lists objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. One object is visible: 'Parent' with API NAME 'Parent\_\_c', TYPE 'Custom Object', and LAST MODIFIED '07/10/2023'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Parent	Parent__c	Custom Object		07/10/2023

- ❑ Custom Tabs: School, student, Parent.



The screenshot shows the 'Custom Tabs' page in Salesforce. The page title is 'Custom Tabs' under the 'SETUP Tabs' section. Below the title, there's a description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' followed by a paragraph: 'Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs Experience and the mobile app.' At the bottom, there's a section titled 'Custom Object Tabs' with a 'New' button and a 'What Is This?' link.

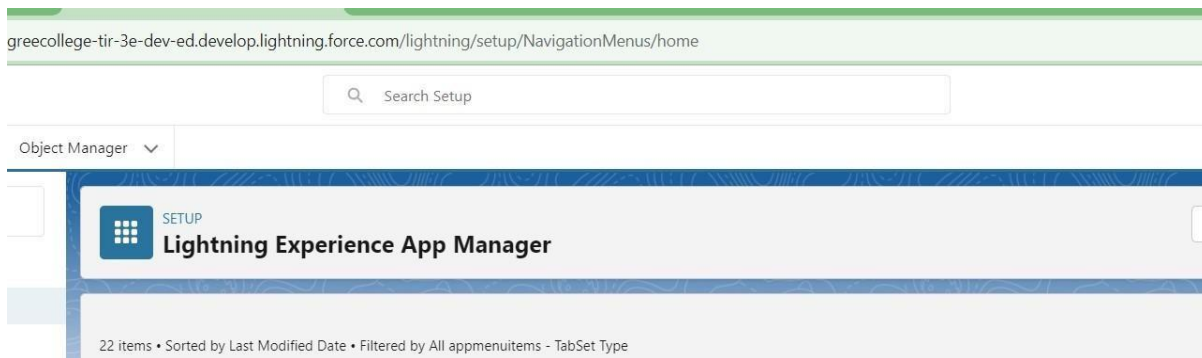
Custom Object Tabs
<a href="#">New</a> <a href="#">What Is This?</a>

## 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:

A screenshot of the Salesforce 'Fields & Relationships' page for the 'School' object. The page shows a list of 11 fields, sorted by Field Label. The fields are: Address, Created By, District, Highest Marks, Last Modified By, Number of students, Owner, and Phone Number. Each field has a corresponding field name and data type. The 'Number of students' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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	

## □ Fields in Student Object:

The screenshot shows the 'Fields & Relationships' page for the 'Student' object in Salesforce Setup. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'Student' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 9 items listed.

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:

The screenshot shows the 'Fields & Relationships' page for the 'Parent' object in Salesforce Setup. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'Parent' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, and Controlling Field. There are 6 items listed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Parent Address	Parent Address__c	Text Area(255)	

## 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.



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

**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 Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	School Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	DIVJA ARUNACHALAMGARI	10/10/2023, 7:19 pm	Modified By DIVJA ARUN

**Page Layouts**

<b>Standard Object Layouts</b>			
Global	Global Layout [ View Assignment ]	Object Milestone	Object Milestone [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Operating Hours	Operating Hours [ View Assignment ]

## 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. □ User – Principal

2. From Setup, in the Quick Find box, enter Users.
3. Select Users.
4. Click New User.
5. Enter the user's name as Madhusudhanpodipattu and email address and a unique username in the form of an email address.
6. By default, the username is the same as the email address.
7. Select a User License as salesforce.
8. Select a profile as a School profile.
9. Check Generate new password and notify the user immediately.

sreevidhyanikethan-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Home Object Manager

**SETUP Users**

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

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

New User Reset Password(s) Add Multiple Users

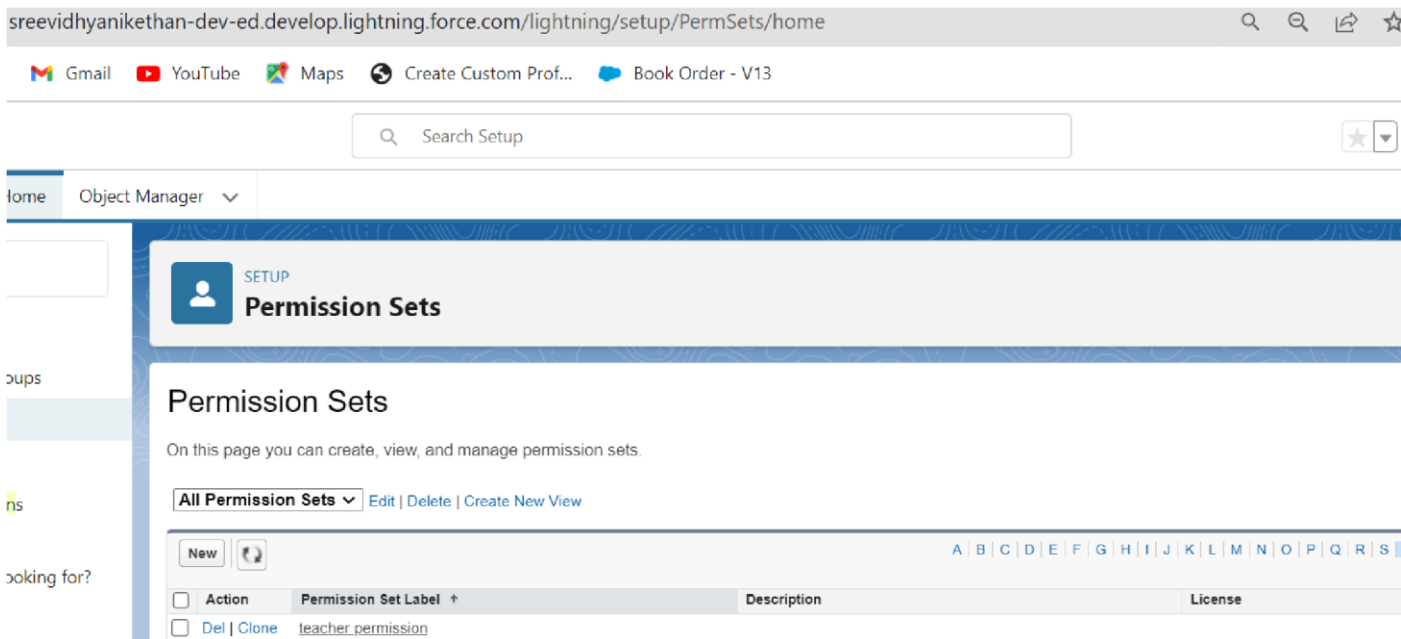
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d5g00000l8d3yeaf.pcjue8hjhlu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	Dev	dev	kavya1432@gmail.com		✓	Standard Platform User
<input type="checkbox"/>   Edit	Kavya_GADHAMSETTY	GKavy	kavyalalli@project.com		✓	System Administrator
<input type="checkbox"/>   Edit	Parents	pare	kavya1234@gmail.com		✓	School Profile
<input type="checkbox"/>   Edit	principals	prin	principal65821@gmail.com		✓	Cross Org Data Proxy Us
<input type="checkbox"/>   Edit	Teachers	teac	teacher6582@gmail.com		✓	Cross Org Data Proxy Us
<input type="checkbox"/>   Edit	time	time	time1432@gmail.com		✓	Standard Platform User
<input type="checkbox"/>   Edit	User Integration	integ	integration@00d5g00000l8d3yeaf.com		✓	Analytics Cloud Integratio

## 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.
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.



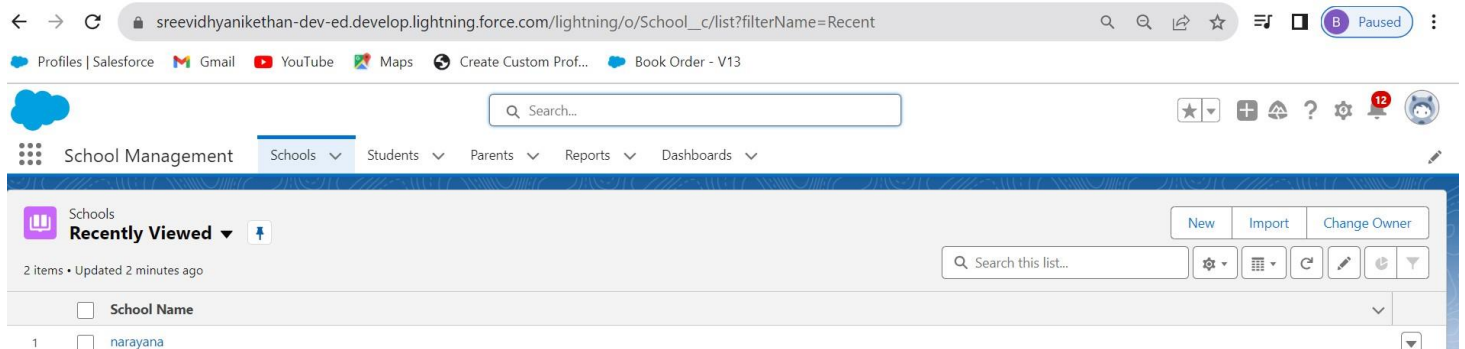


## □ Permission Sets 2

### Milestone 08 - User Adoption

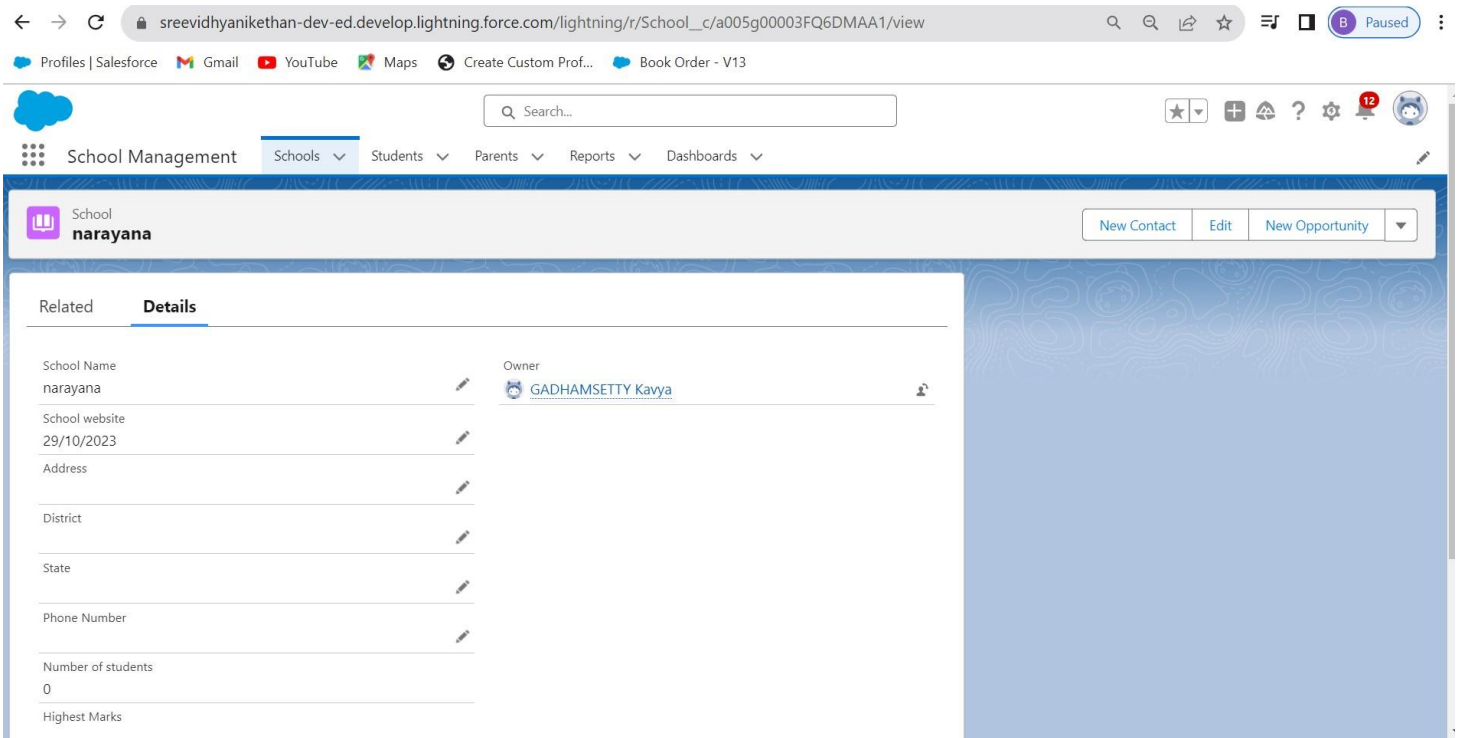
#### □ Create Record (School)

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)

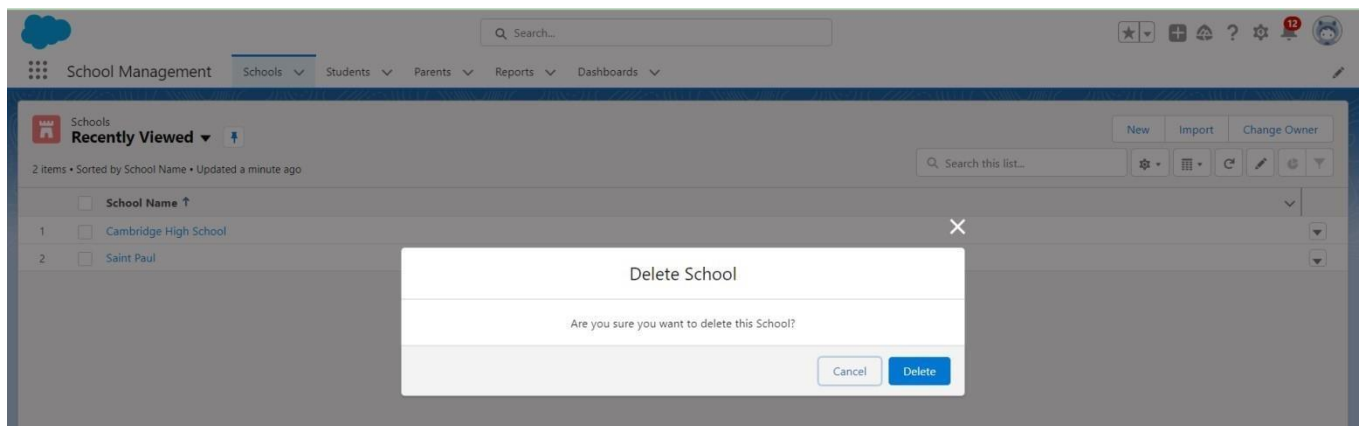
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on any record name. you can see the details of the School.



□

### 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

2) WhatsApp x | Smartinternz x | Developer Edition Signup x | Welcome to Salesforce: V... x | Home | Salesforce x | Reports | Salesforce

← → ↺ gayatridegreecollegetir143-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

School Management Schools Students Parents Reports Dashboards

Reports

Recent

1 item

Search recent reports...

REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Schools with Students Report		Private Reports	DIVIJA ARUNACHALAMGARI	10/10/2023, 8:42 pm

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

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.

sreevidhyanikethan-dev-ed.develop.lightning.force.com/lightning/r/Report/00O5g00000EHOedEAH/view?queryScope=userFolders

Profiles | Salesforce Gmail YouTube Maps Create Custom Prof... Book Order - V13

School Management Schools Students Parents Reports Dashboards

Report: Schools with Students  
**New Schools with Students Report**

Enable Field Editing

Record Count

School: School Name

School: School Name	Record Count
vidhyanikethan	1

School: School Name Student: Student Name

School: School Name	Student: Student Name
vidhyanikethan (1)	Kavya
Subtotal	
Total (1)	

The End