

# PROJECT REPORT ON

## Creation Of An Application For School Management

### Introduction:

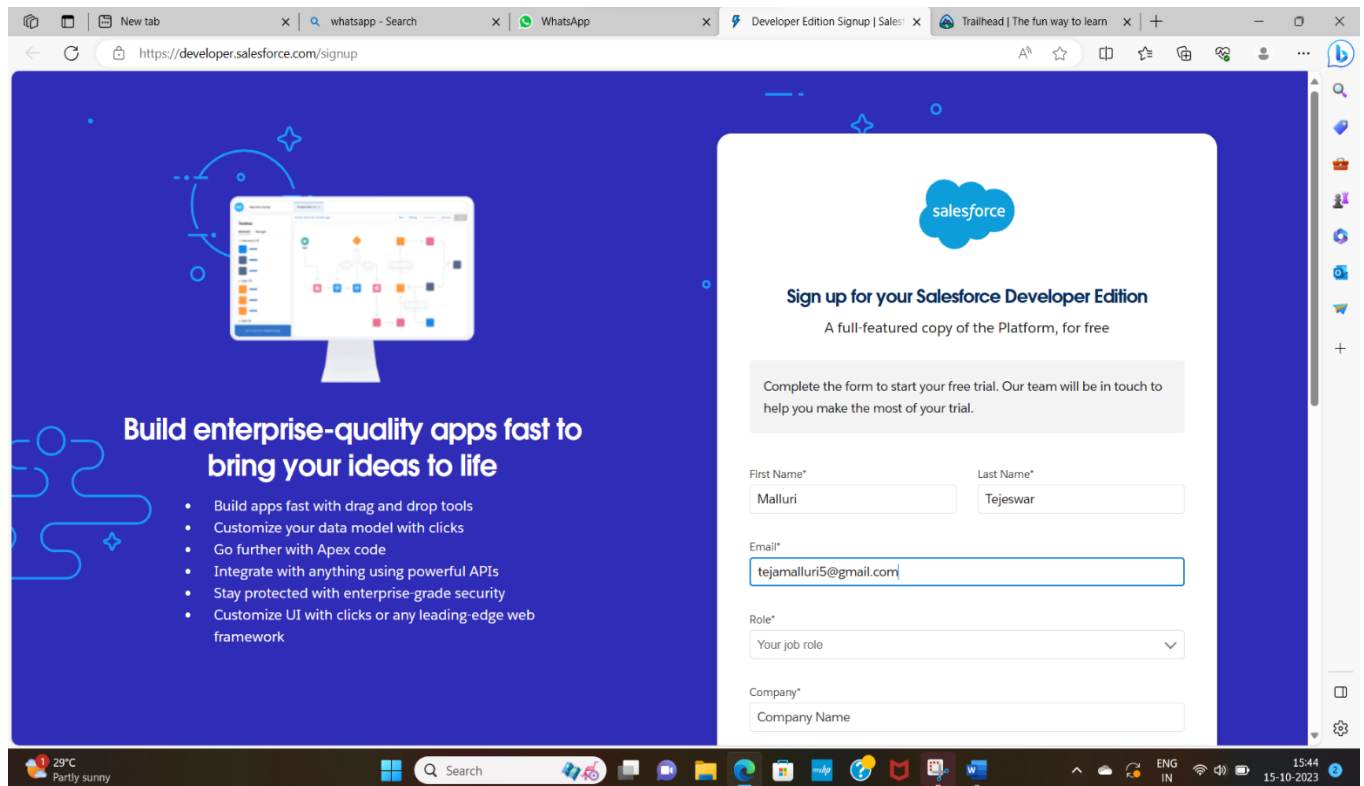
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in crosstechnology and want to switch to Salesforce. With the help of this project they will gain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

### Milestone 01 –Creating Admin Org ☐

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

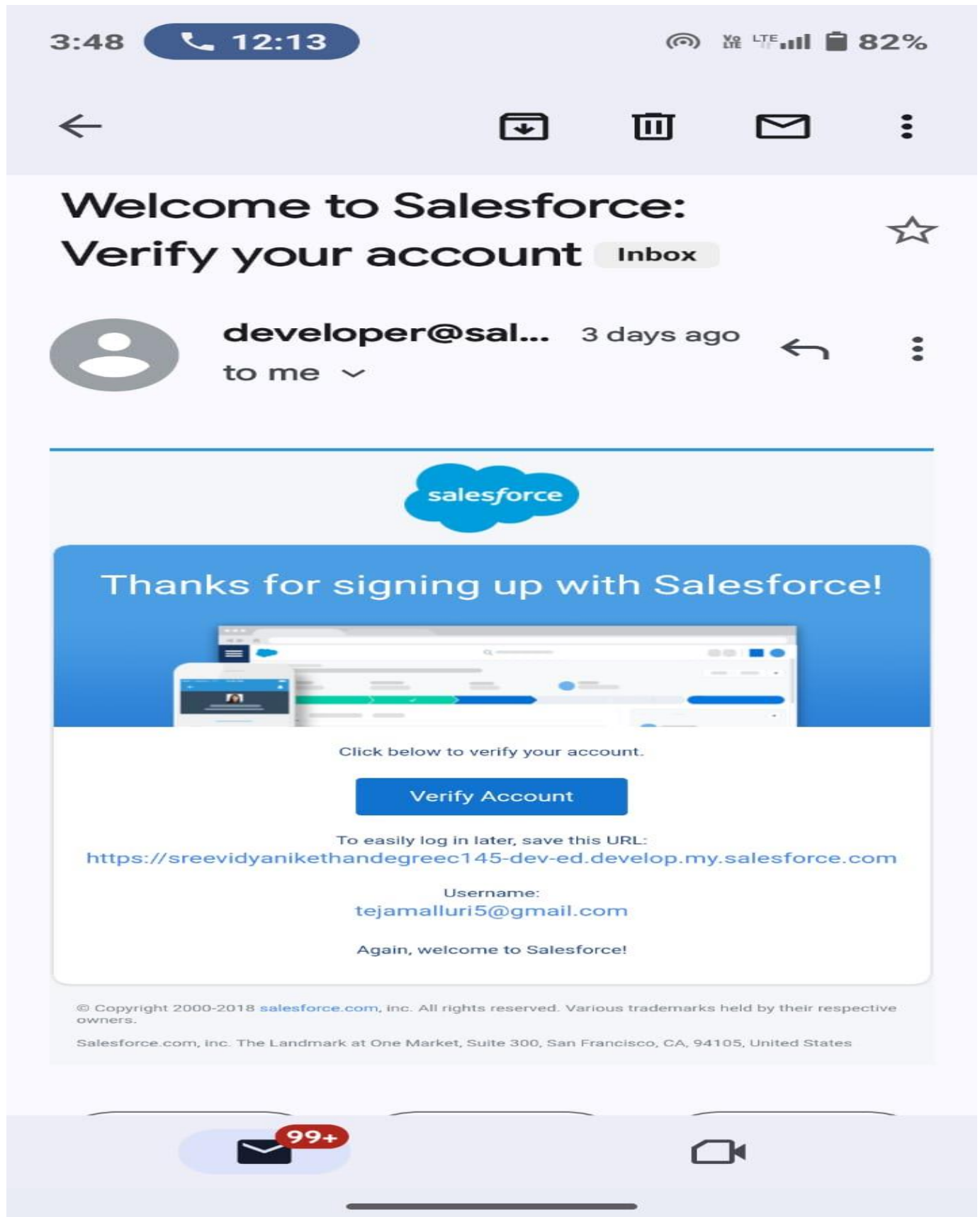
Click on sign up.

- ☐ On the sign up form, enter the following details
- ☐ First name & Last name – Teja Malluri
- ☐ Email – [tejamalluri5@gmail.com](mailto:tejamalluri5@gmail.com)
- ☐ Role –SALESFORCE ADMIN
- ☐ Company – Sree Vidhyanikethan-Rangampeta
- ☐ Country - India
- ☐ Postal Code – pin code 517505
- ☐ Username – [tejamalluri5@gmail.com](mailto:tejamalluri5@gmail.com)



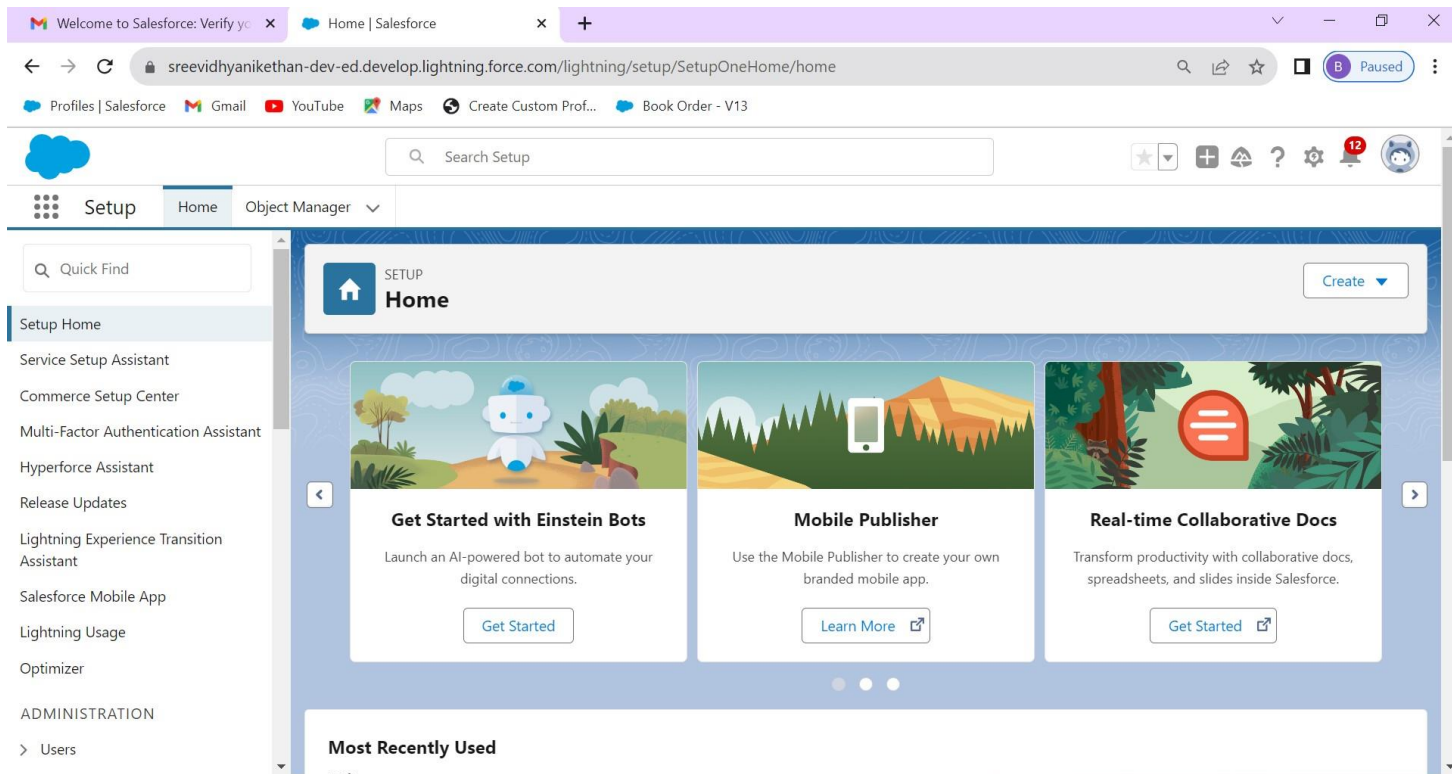
### Account Activation

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](https://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>

New tab

whatsapp - Search

WhatsApp

← × https://login.salesforce.com



Username

tejamalluri5@gmail.com

Password

.....

Log In

☐ Remember me

[Forgot Your Password?](#)

[Use Custom Domain](#)


Not a customer?


Try for Free

Waiting for stat...

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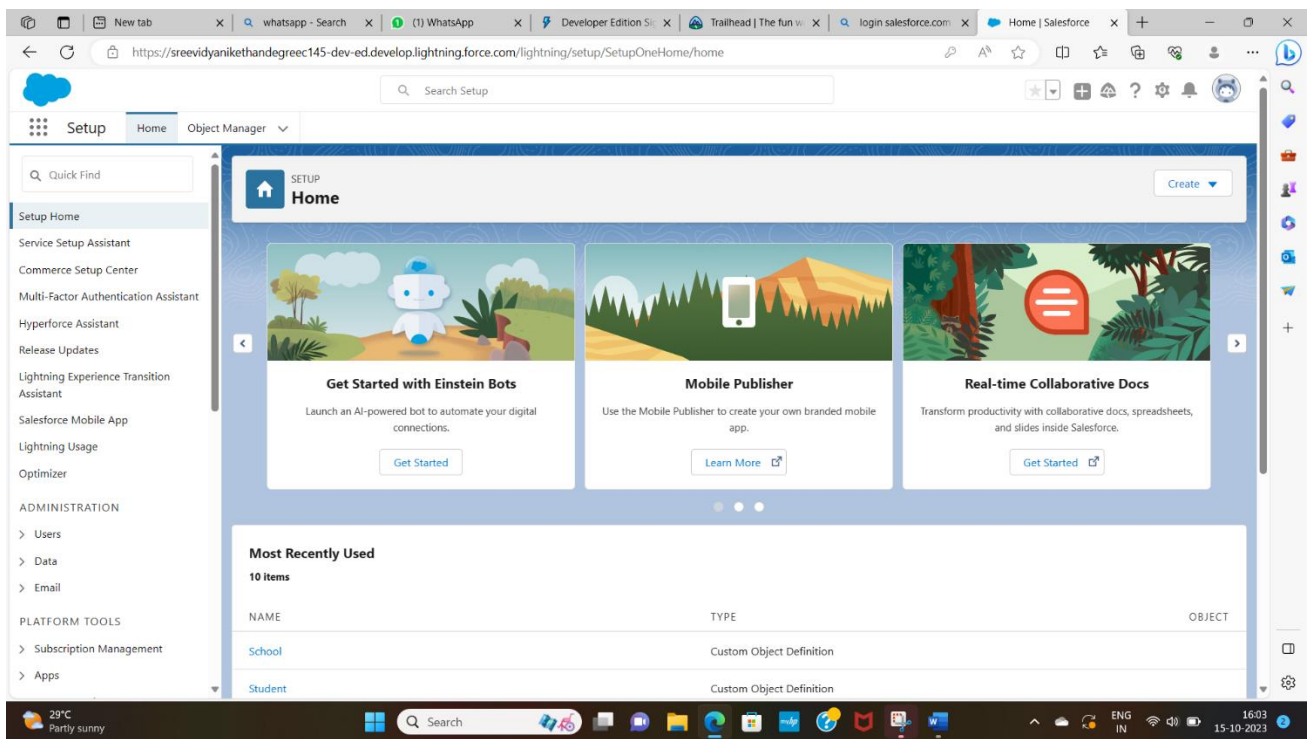
1 29°C  
Partly sunny





## 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.



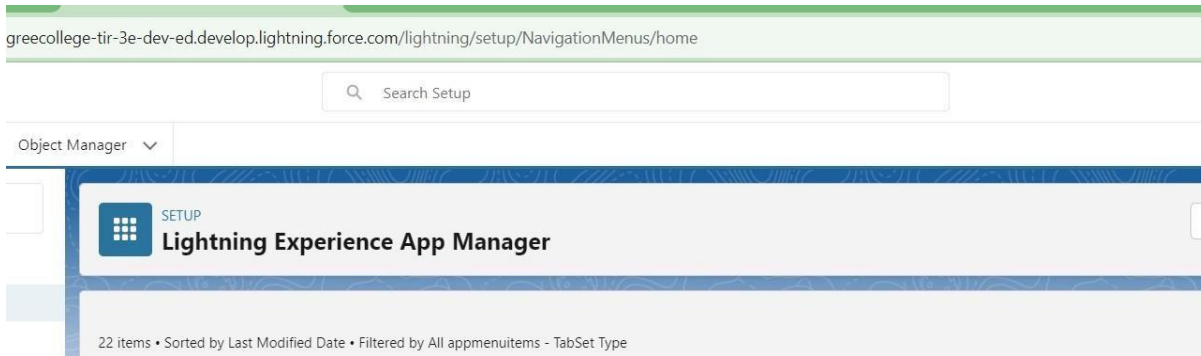
## Milestone 03 - Lightning App

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.
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
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 Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The left sidebar contains navigation options: 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, and Scoping Rules.

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:

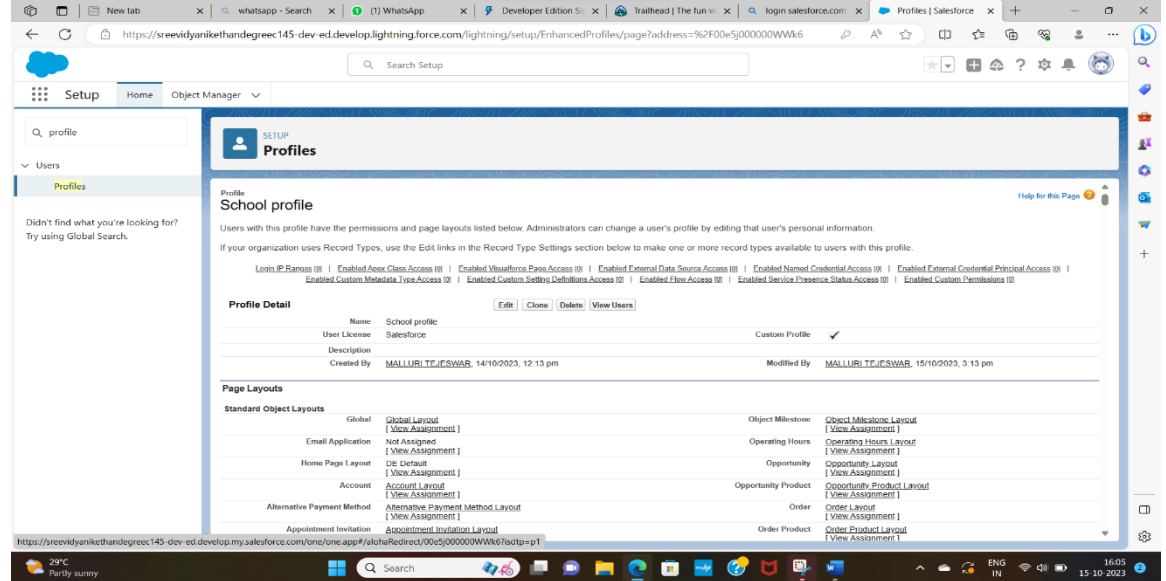
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a list of 6 fields. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

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.





## Milestone 06 – Users

### ☐ Creating A User

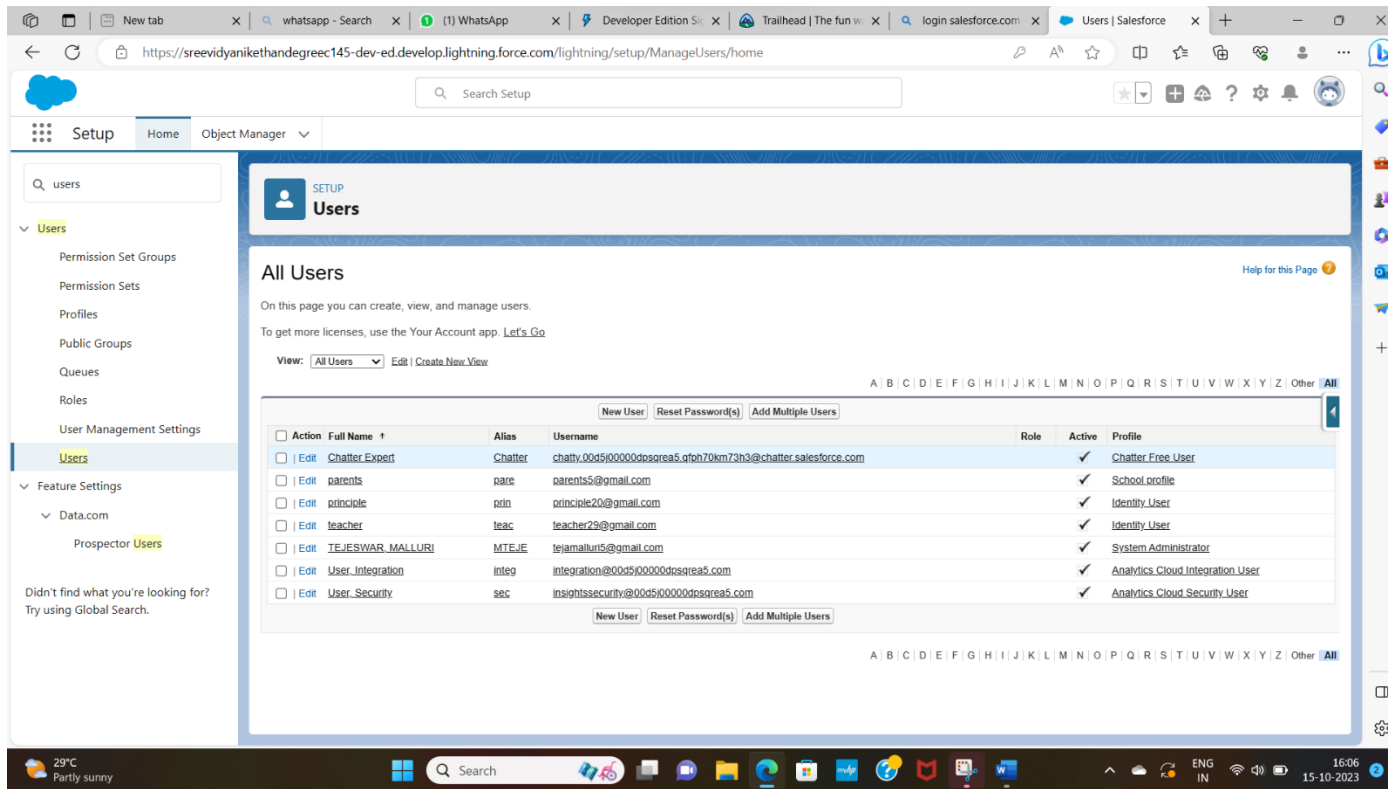
#### ☐ User - Parent

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

#### ☐ 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.

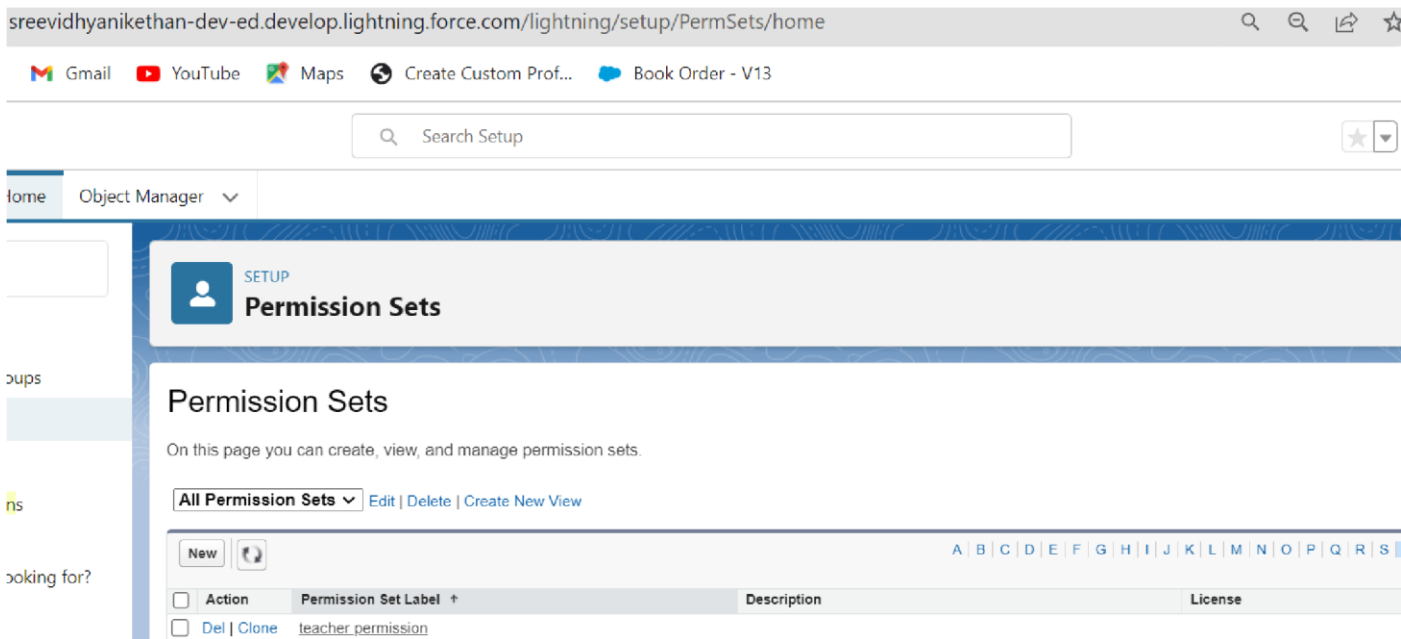




## Milestone 07 - Permission Sets

### □ 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.



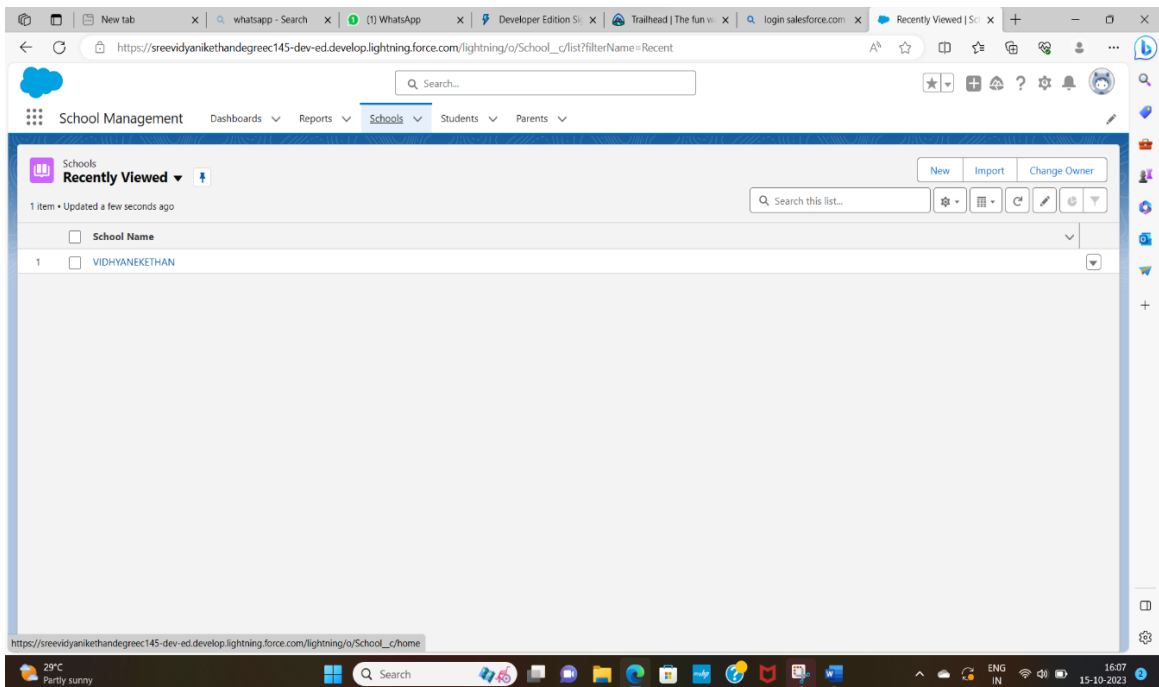
## □ Permission Sets 2

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.

The screenshot displays a web browser window with multiple tabs. The active tab shows a Salesforce Lightning page for the 'School Management' app. The page header includes a search bar and navigation tabs: 'School Management', 'Dashboards', 'Reports', 'Schools' (selected), 'Students', and 'Parents'. The main content area shows the details of a school record named 'VIDHYANEKETHAN'. The record is owned by 'MALLURI TEJESWAR' and was created by 'MALLURI TEJESWAR' on 15/10/2023 at 3:04 pm. The page is titled 'School VIDHYANEKETHAN' and has a 'Related' and 'Details' tab, with 'Details' being the active tab. The bottom of the screen shows a Windows taskbar with a weather widget indicating 29°C and light rain, a search bar, and various application icons.

Browser tabs: New tab, whatsapp - Search, (1) WhatsApp, Developer Edition Sig, Trailhead | The

URL: [https://sreevidyanikethandegreec145-dev-ed.develop.lightning.force.com/lightning/r/School\\_\\_c/a055j00000WxMuEAAV/view](https://sreevidyanikethandegreec145-dev-ed.develop.lightning.force.com/lightning/r/School__c/a055j00000WxMuEAAV/view)

Search bar: Search...

Navigation tabs: School Management, Dashboards, Reports, Schools, Students, Parents

School Name: VIDHYANEKETHAN

Owner: MALLURI TEJESWAR

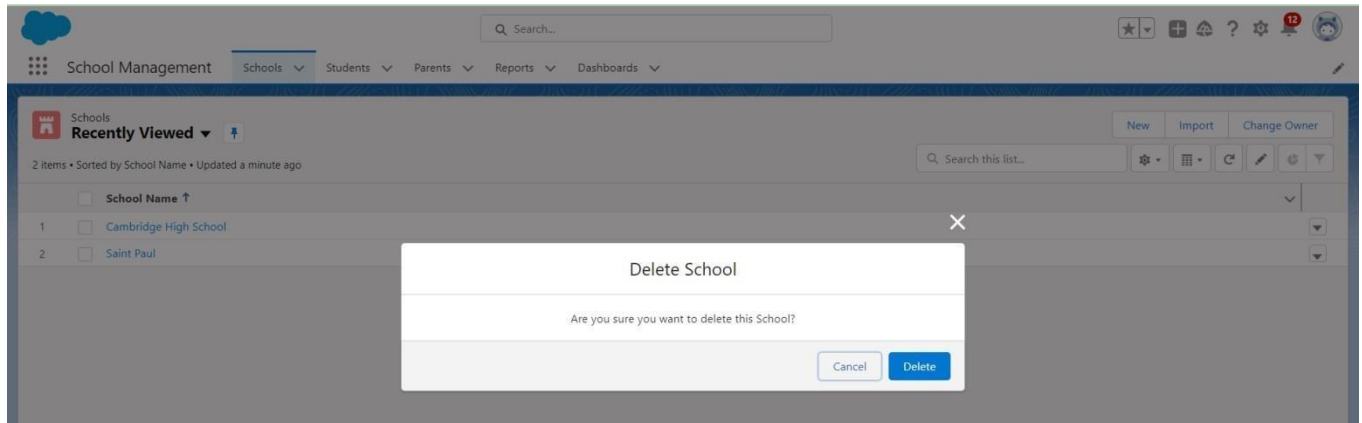
Created By: MALLURI TEJESWAR, 15/10/2023, 3:04 pm

Last Modified By: MALLURI TEJESWAR, 15/10/2023, 3:04 pm

Taskbar: 29°C Light rain, Search, File Explorer, Edge, Task View

## Delete Record (School)

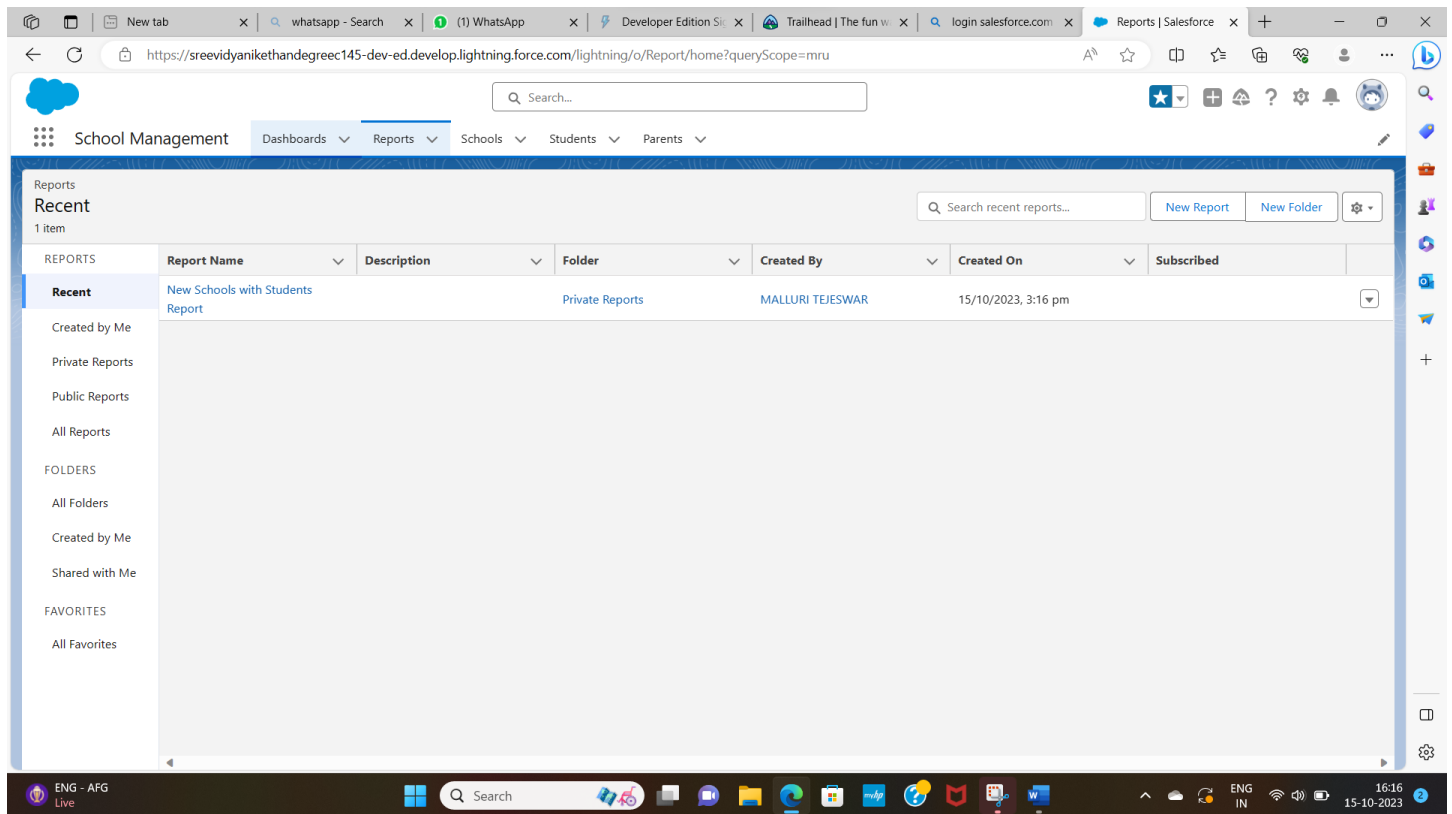
1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Schools Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



## 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