

**PROJECT REPORT ON**  
**Implementing CRM for Result Tracking of a Candidate with Internal Marks**  
**(ADMIN) - (Short-term)**

**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 to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

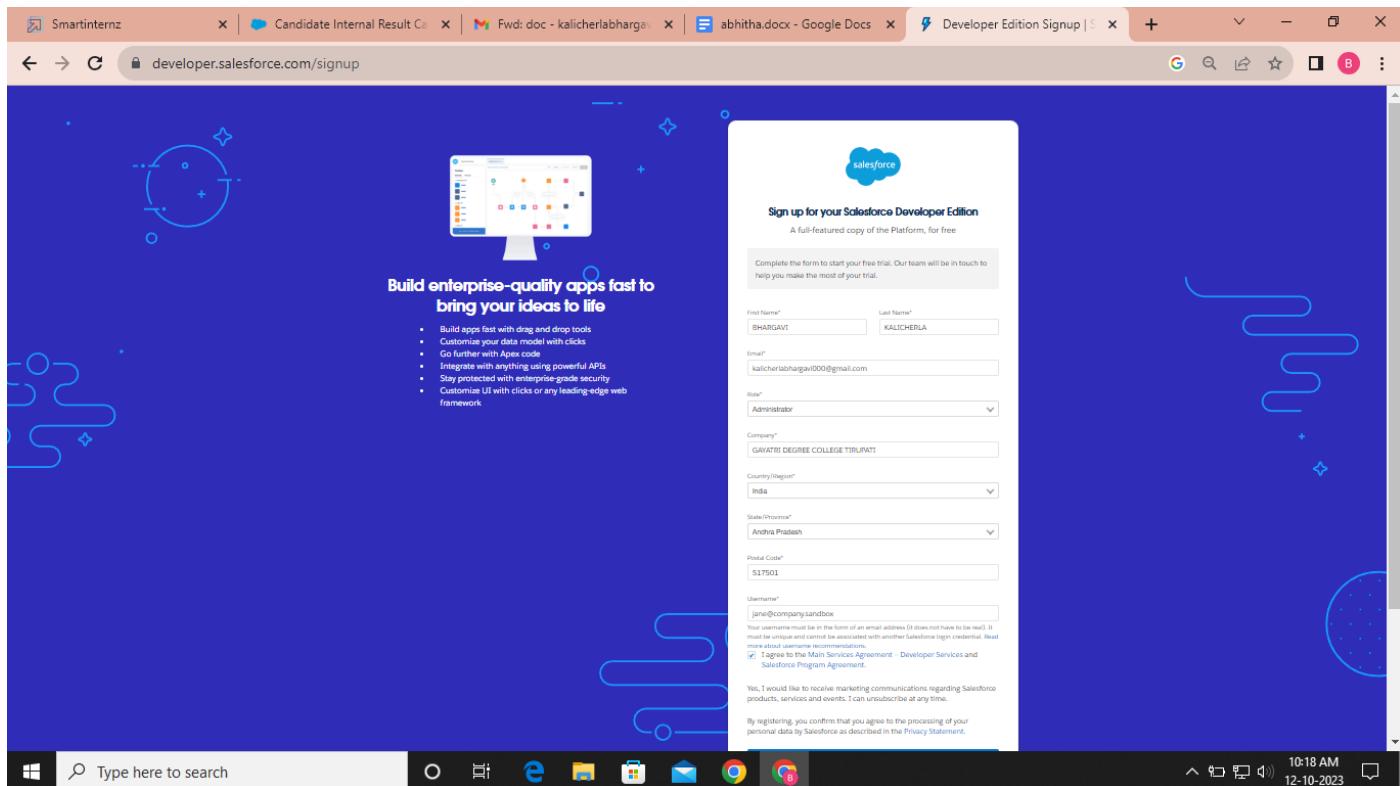
**Milestone 01:** Create Salesforce Org

Go to [developers.salesforce.com/Signup](https://developer.salesforce.com/signup)

Click on sign up.

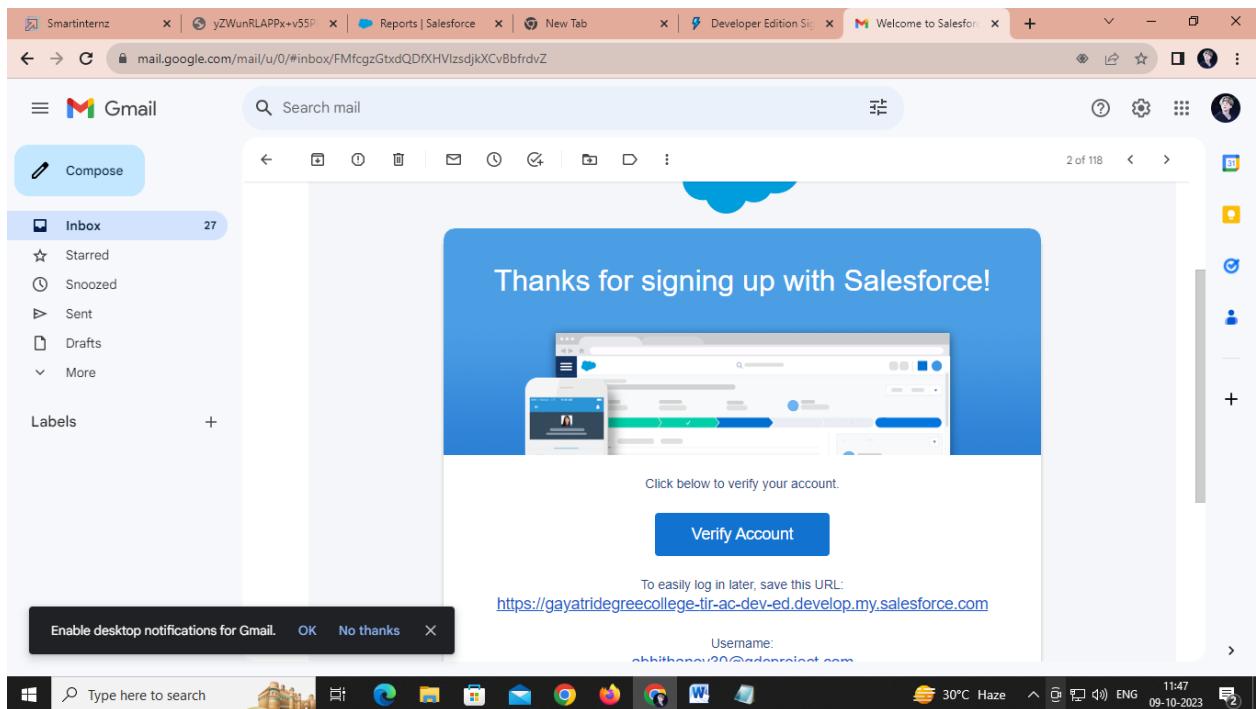
On the sign-up form, enter the following details:

1. First name & Last name –BHARGAVI&KALICHERLA
2. Email – kalicherlabhargavi000@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: kalicherlabhargavi000@gdcproject.com



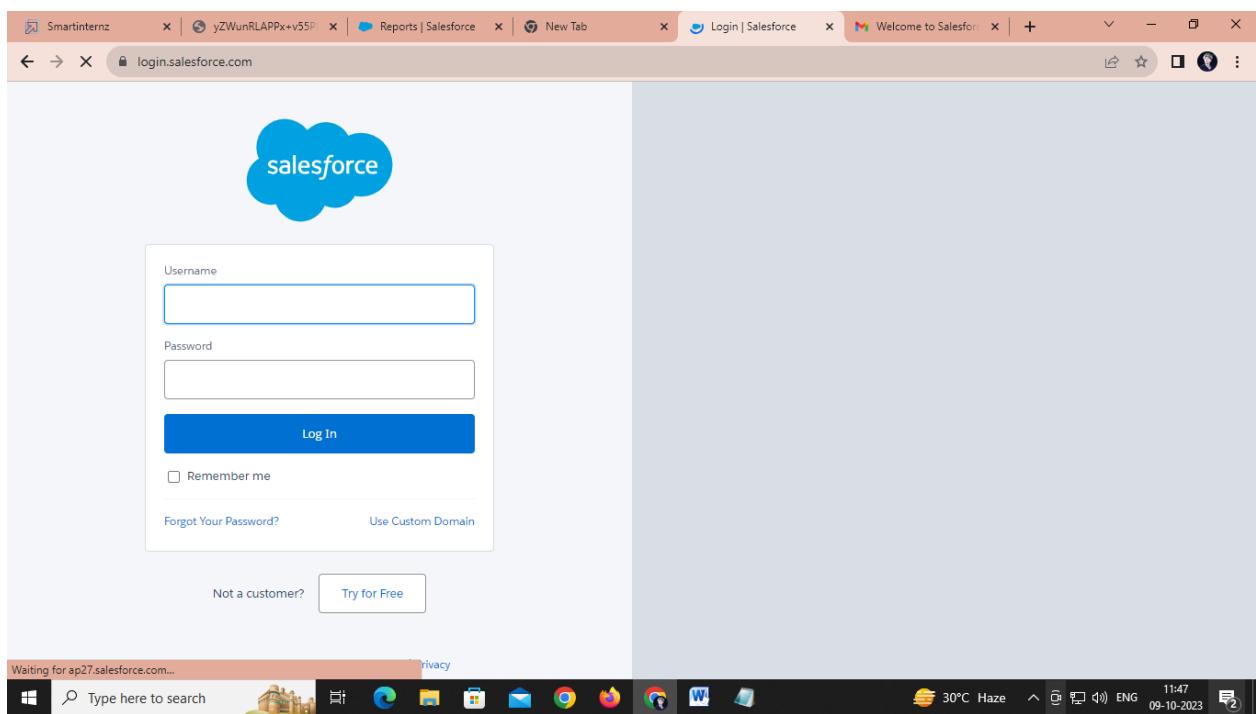
**Account Activation**

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

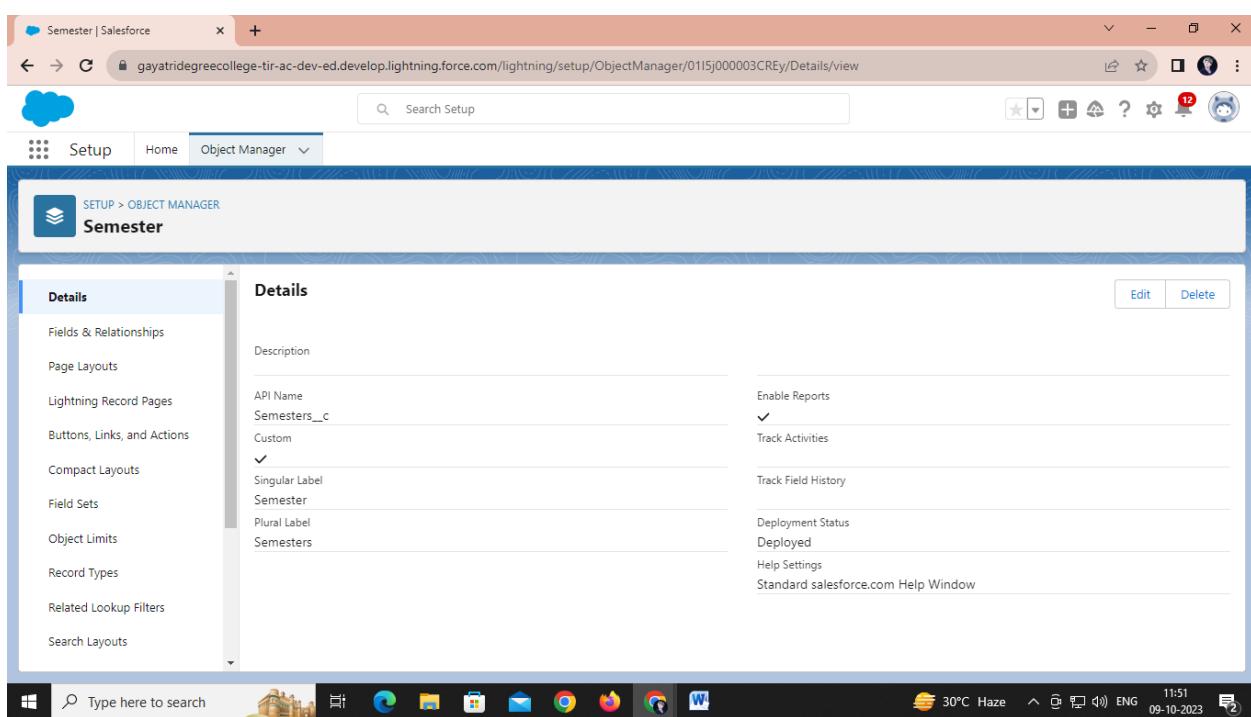
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



## Milestone – 02: Creation of Objects

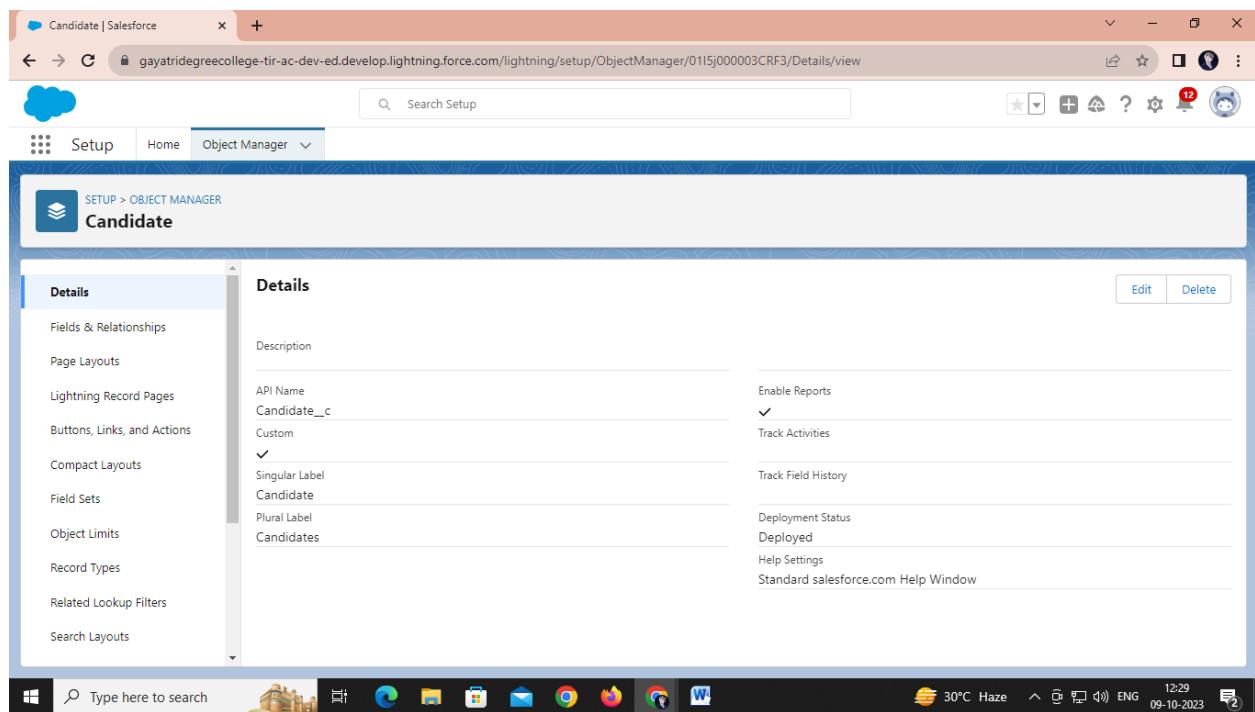
## Object – Semester

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 Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
  5. Label: **Semester**
  6. Plural Label: Semesters
  7. Record Name: Semester Name
  8. Check the Allow Reports
  9. Check the Allow Search
  10. Click Save.



## Object – Candidate

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 Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
  5. Label: **Candidate**
  6. Plural Label: Candidates
  7. Record Name: Candidate Name
  8. Check the Allow Reports
  9. Check the Allow Search
  10. Click Save



## Object – Course Details

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 Drop down click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Course Details**
5. Plural Label: course details
6. Record Name: course details Name
7. Check the Allow Reports
8. Check the Allow Search
9. Click Save.

**Course Details**

**Details**

Description

API Name: Course\_Details\_\_c  
Custom: ✓  
Singular Label: Course Details  
Plural Label: Course Details

Enable Reports: ✓  
Track Activities  
Track Field History  
Deployment Status: Deployed  
Help Settings: Standard salesforce.com Help Window

## Object – Lecturer Details

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 Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Lecturer Details**
6. Plural Label: Lecturer Details
7. Record Name: Lecturer Details Name
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save.

**Lecturer Details**

**Details**

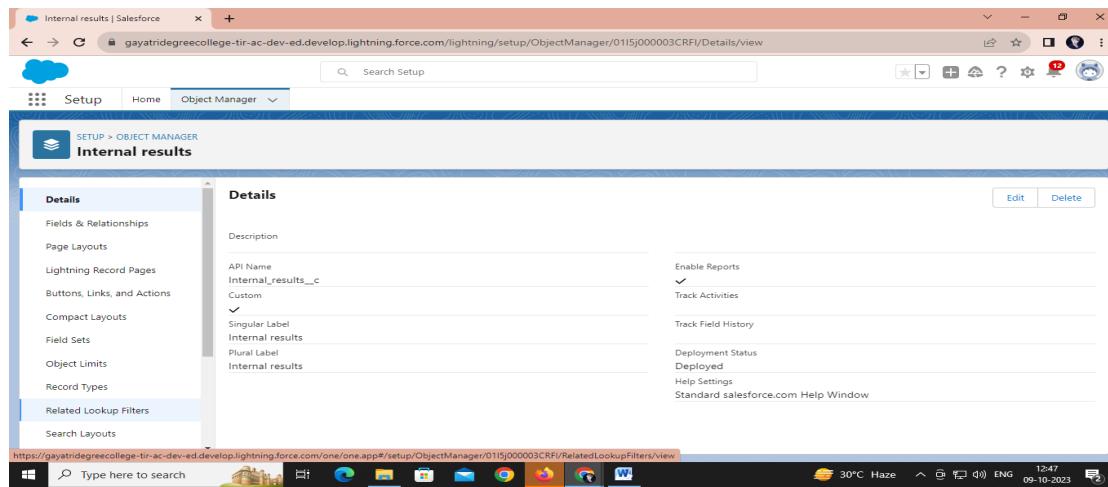
Description

API Name: Lecturer\_Details\_\_c  
Custom: ✓  
Singular Label: Lecturer Details  
Plural Label: Lecturer Details

Enable Reports: ✓  
Track Activities  
Track Field History  
Deployment Status: Deployed  
Help Settings: Standard salesforce.com Help Window

## 1. Object – Internal results

2. Click on the gear icon and then select Setup.
3. Click on the object manager tab just beside the home tab.
4. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
5. On the Custom Object Definition page, create the object as follows:
6. Label: – **Internal results**
7. Plural Label: Internal results
8. Record Name: Internal results Name
9. Check the Allow Reports
10. Check the Allow Search
11. 10.Click Save.



### Milestone – 03: Tabs

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

**There are mainly 4 types of tabs:**

- a. Standard Object Tabs: Standard object tabs display data related to standard objects
  - b. Custom Object Tabs: Custom object tabs displays data related to custom objects.
  - c. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
  - d. Visual force Tabs: Visual force Tabs display data from a Visual force Page.
- Creation of semester candidate internal result card

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Semester.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects -Candidate, Course Details, Lecturer Details, Internal results.

## Milestone – 04: 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. The simplest app usually has just two tabs. There are two types of app –

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center content, Salesforce chatter, App Launcher, etc are present in it.

Note: The description, Logo, and Label of standard app cannot be altered.

2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

Note: Logos for Custom Apps can be changed.

# Create The Candidate Internal Result Card App

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Candidate Internal Result Card 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 Semester, Candidate, Course Details, Lecturer Details, Interna results, Reports, and Dashboards and move them to Selected Items.
7. Click Next

From Available Profiles, select and move it to Selected Profiles. Click Save & Finish. System Administrator

#### Milestone – 05: fields and relationship

## Fields And Relationship

**Fields** - Fields store data values that are required for a particular object in a record . 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

Object Name	Field Name	Data type
Semester	Semester Name Course	Text(Standard field) Lookup(Course Details)
Candidate	Candidate Name Candidate Roll Number Semester Name	Text(Standard field) Auto Number Lookup(Semester)
Lecturer Details	Lecturer Name Lecturer Role Course	Text(Standard field) Text Lookup(Course)
Course Details	Course Name Duration (Years)	Text(Standard field) Number
Internal results	Candidate Candidate Roll Number	Lookup (candidate) Formula

	Course Marks	Lookup(Course) Number
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## Creation Of Text Field On "Lecturer Details" & Look Up Field For The “Candidate” Object

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 Lecturer Details
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click next.
7. For Field Label, enter Lecturer Role
8. Enter Length 40
9. Click Next, Next, then Save & New

The screenshot shows the Salesforce Setup interface. At the top, there's a toolbar with various icons. Below it, the navigation bar has tabs for 'Setup' and 'Home', with 'Object Manager' selected and highlighted by a red box. To the right of the tabs is a search bar containing 'lect'. Further right are buttons for 'Schema Builder' and 'Create'. The main area is titled 'Object Manager' and shows a list of objects. One object, 'Lecturer Details', is highlighted with a red box. Its details are shown in a table: 'LABEL' is 'Lecturer Details', 'API NAME' is 'Lecturer\_Details\_\_c' (also highlighted with a red box), 'TYPE' is 'Custom Object', 'DESCRIPTION' is blank, 'LAST MODIFIED' is '06/04/2023', and 'DEPLOYED' has a checkmark. A red box also highlights the '3' at the bottom of this row.

This screenshot shows the 'Fields & Relationships' screen for the 'Lecturer Details' object. The left sidebar has tabs for 'Details', 'Fields & Relationships' (which is selected and highlighted with a red box), 'Page Layouts', and 'Lightning Record Pages'. The main area is titled 'Fields & Relationships' and shows a list of fields. At the top of this list is a 'New' button, which is highlighted with a red box. The first field listed is 'Address', with its details: 'FIELD LABEL' is 'Address', 'FIELD NAME' is 'Address\_\_c', 'DATA TYPE' is 'Text(50)', and 'CONTROLLING FIELD' and 'INDEXED' are both blank. A red box highlights the 'Address' label in the list.

<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number. For example, "10" and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text <span style="border: 1px solid red; padding: 2px;">6</span>	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 256 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) <span style="border: 1px solid red; padding: 2px;">A</span>	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "12:45 PM", "114:45:01", and "114:45:00-600" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Step 2. Enter the details

Step 2 of 4

<b>Field Label</b>	Lecturer Role	<b>7</b>
<b>Length</b>	40	<b>8</b>
<b>Field Name</b>	Lecturer_Role	<b>9</b>
<b>Description</b>		
<b>Help Text</b>		

**Previous** **Next** **Cancel**

The screenshot shows the Salesforce Lightning Object Manager interface. The top navigation bar includes tabs for Smartinternz, Candidate Internal Re, Lecturer Details | Sale, Fwd: doc - kalicherla, abhitha.docx - Goog, Developer Edition Sis, and a plus sign for new tabs. The main header has a blue cloud icon, a search bar labeled "Search Setup", and various global buttons like Home, Object Manager, and Help.

The page title is "SETUP > OBJECT MANAGER" under "Lecturer Details". On the left sidebar, there are links for Details, Fields & Relationships (which is currently selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

The main content area displays the "Lecturer Role" custom field definition. It shows the following details:

Custom Field Definition Detail	
<a href="#">Edit</a> <a href="#">Set Field-Level Security</a> <a href="#">View Field Accessibility</a> <a href="#">Where is this used?</a>	
<b>Field Information</b>	
Field Label	Lecturer Role
Field Name	Lecturer_Role
API Name	Lecturer_Role__c
Description	Help Text
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	BHARGAVI KALICHERLA 09/10/2023, 12:29 pm
Modified By	BHARGAVI KALICHERLA 09/10/2023, 12:29 pm
<b>General Options</b>	
Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>

At the bottom of the page, there is a "Help for this Page" link with a question mark icon. The status bar at the bottom right shows the time as 10:31 AM and the date as 12-10-2023.

Now Let's create a Lookup field on candidate object

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 candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the lookup as the Data Type, then click Next.
7. In related select Semester
8. For Field Label Semester Name, enter.
9. Click Next, Next, then Save & New.

1

2

3

Object Manager

lect

Lecturer Details    Lecturer\_Details\_\_c    Custom Object

4

5

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(50)		
Created By	CreatedById	Lookup(User)		

6

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Semester

**7**

Previous Next Cancel

Field Label: Semester Name

Field Name: Semester Name

Description:

Help Text:

**8**

Note- Similarly create all lookup fields on their respective objects.

SETUP > OBJECT MANAGER  
Semester

Details  
Fields & Relationships

Semester Field  
Semester Name  
Back to Semester

Field Information

Field Label	Semester Name
Date Type	Text(50)
Description	
Data Owner	System
External ID	
Data Sensitivity Level	Compliance Categorization

Validation Rules

No validation rules defined.

## Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

Let's create a Number field on Course Details object

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 Course Detail.
4. Select Fields & Relationships from the left navigation

4. Click New & select number field, click Next

6. For Field Label Duration, enter.

7. Give Help Text- Enter Course duration value in Years

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

The image consists of three vertically stacked screenshots of the Salesforce Object Manager interface.

**Screenshot 1:** Shows the main Object Manager screen with a red box around the "Object Manager" tab in the top navigation bar. A red number "2" is placed above the search bar. A red box highlights the "lect" search term in the search bar. A red number "1" is located in the top right corner of the header.

**Screenshot 2:** Shows the "Fields & Relationships" section of the Object Manager. A red box highlights the "Fields & Relationships" tab in the left sidebar. A red number "4" is placed above this tab. A red box highlights the "New" button in the top right of the list area. A red number "5" is placed above the "New" button. The list shows two items: "Address" and "Created By".

**Screenshot 3:** Shows the "New Number Field" configuration page. A red box highlights the "Field Label" input field containing "Duration". A red number "6" is placed above this field. Below it, a note says: "Please enter the length of the number and the number of decimal places. For example, a number with a length of 5 and 2 decimal places can accept values up to "12345678.90"." A red box highlights the "Length" input field with the value "1". A red number "7" is placed above this field. A red box highlights the "Help Text" input field containing "Enter Course duration value in Years". A red number "7" is placed above this field.

Now Let's create a Formula field on Internal Results object

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 Internal results.

4. Select Fields & Relationships from the left navigation.

5. Click New

6. Select the Formula as the Data Type, then click Next.

7. Give field label Candidate Roll Number

8. Select formula return type text, Click Next

9. Click Insert Field

10. Create and insert formula Candidate r.Candidate\_Roll\_Number c, and then click Insert.

11. Click Next, Next, then Save.

The screenshot shows the Salesforce Object Manager. A red box labeled '1' highlights the 'New' button in the top right corner. A red box labeled '2' highlights the 'Object Manager' tab in the top navigation bar. A red box labeled '3' highlights the API name 'Lecturer\_Details\_\_c' in the list of objects.

The screenshot shows the 'Fields & Relationships' section of the custom object creation page. A red box labeled '4' highlights the 'Fields & Relationships' tab in the sidebar. A red box labeled '5' highlights the 'New' button in the top right corner of the list table.

The screenshot shows the 'Data Type' selection screen. A red box labeled '6' highlights the 'Formula' radio button. The other options shown are 'None Selected' and 'Auto Number'. A note next to 'Formula' states: 'A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.'

Field Label **Candidate Roll Number** 7

Field Name **Candidate\_Roll\_Number** 8

Auto add to custom report type  Add this field to existing custom report types that contain this entity 9

**Formula Return Type**

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.  
Example: `TOORIGIN > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `Gross Margin = Amount - Cost_c`

Date Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `Reminder Date = CloseDate - 7`

DateTime Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: `Next = NOW() + 1`

Number Calculate a numeric value.  
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Text Create a text string, for example, by concatenating other text fields.  
Example: `Full Name = LastName & ", " & FirstName`

Example: `Full Name = LastName & ", " & FirstName` [More Examples...](#) 10 [Operators & Functions](#)

[Simple Formula](#) [Advanced Formula](#)

**Insert Field** 11 **Insert Operator** 12

`Candidate Roll Number (Text) =`

**Functions**

13 All Function Categories -- ▾

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

**Insert Selected Function**

**Insert Field** 14

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Internal results > \$Api > \$Organization > \$Profile > \$System > \$User > \$UserRole >	Candidate Candidate > Created By > Created By ID Created Date Internal results Name Last Modified By > Last Modified By ID Last Modified Date	Address Candidate Name <b>Candidate Roll Number</b> <span style="border: 2px solid red; padding: 2px;">15</span> City Created By > Created By ID Created Date Education Email	You have selected: <b>Candidate__r.Candidate_Roll_Number_c</b> Type: Auto Number API Name: Candidate__r.Candidate_Roll_Number_c <span style="border: 2px solid red; padding: 2px;">16</span> Insert
--	---	---	---

17 Close

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Smartinternz, Candidate Internal Re..., Candidate | Salesforce, Fwd: doc - kalicherla..., abhitha.docx - Google..., and Developer Edition Site. The main header has a blue cloud icon, a search bar labeled 'Search Setup', and various navigation icons. The left sidebar under 'SETUP > OBJECT MANAGER' shows a tree view with 'Candidate' selected. The main content area displays 'Candidate Custom Field Candidate Roll Number'. The 'Fields & Relationships' tab is active. The 'Custom Field Definition Detail' section shows the following details:

Field Label	Candidate Roll Number	Object Name	Candidate
Field Name	Candidate_Roll_Number	Data Type	Auto Number
API Name	Candidate_Roll_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	BHARGAVI KALICHERLA, 09/10/2023, 12:18 pm	Modified By	BHARGAVI KALICHERLA, 09/10/2023, 12:18 pm
General Options			
External ID			

Below this, there are sections for 'Auto Number Options' and a footer with a search bar and system status.

Now Let's create an auto number field on Candidate object

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 Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate enter Roll Number.
8. Give a display format
9. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager page. The top navigation bar has a blue cloud icon, a search bar labeled 'Search Setup', and various icons. The main header shows 'SETUP Object Manager'. The main content area displays a table of objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		08/04/2023	✓

Three numbered callouts point to specific elements: 1 points to the 'Object Manager' tab in the top navigation; 2 points to the 'Create' button in the top right; and 3 points to the newly created 'Lecturer\_Details\_\_c' row in the table.

Details

**Fields & Relationships** 4

11 Items, Sorted by Field Label

New 5 Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedById	Lookup(User)		

None Selected 1 Select one of the data types below.

Auto Number 6 A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Candidate  
New Custom Field Help for this Page 7

Step 2. Enter the details Step 2 of 4

Previous Next Cancel 9

Field Label	Candidate Roll Number 7
Display Format	CAD-(000) Example: A-(0000) What Is This? 8
Starting Number	1
Field Name	Candidate_Roll_Number
Description	
Help Text	

## Milestone – 06: users

# Creating A User

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the First Name, Class, Last Name, Teacher 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.

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.

6. Select a profile as Standard user.

7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top left contains the text 'user' (boxed with red number 1). On the left sidebar, the 'Users' item under 'User Management Settings' is highlighted (boxed with red number 2). The main content area displays the 'All Users' page with a table of existing users. At the top of the table, there are three buttons: 'New User' (boxed with red number 3), 'Reset Password(s)', and 'Add Multiple Users'. The table lists five users with their details:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1.User	u1	utkarsh2@vanshiv.com	Operator_1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2.User	u2	utkarsh3@vanshiv.com	Operator_2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rs8akeaj.muirojkjxf1@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Technologies, Vanshiv	VTech	vehicledemo@vanshiv.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Teddy.John	j.ted	utkarsh1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

The screenshot shows the 'User Edit' page for a new user. The 'General Information' section on the left contains fields for First Name ('Class'), Last Name ('Teacher'), Alias ('cteach'), Email ('+++@++++.com'), Username ('+++@++++.com'), Nickname ('class'), Title (''), Company (''), and Department (''). These fields are all boxed with red number 4. On the right side, there are several dropdown and checkbox options for the user's profile. A large red box groups the following settings:

- Role: <None Specified>
- User License: Salesforce
- Profile: Standard User
- Active:
- Marketing User:
- Offline User:
- Knowledge User:
- Flow User:
- Service Cloud User:

## Milestone – 07: user adoption

# User Adoption

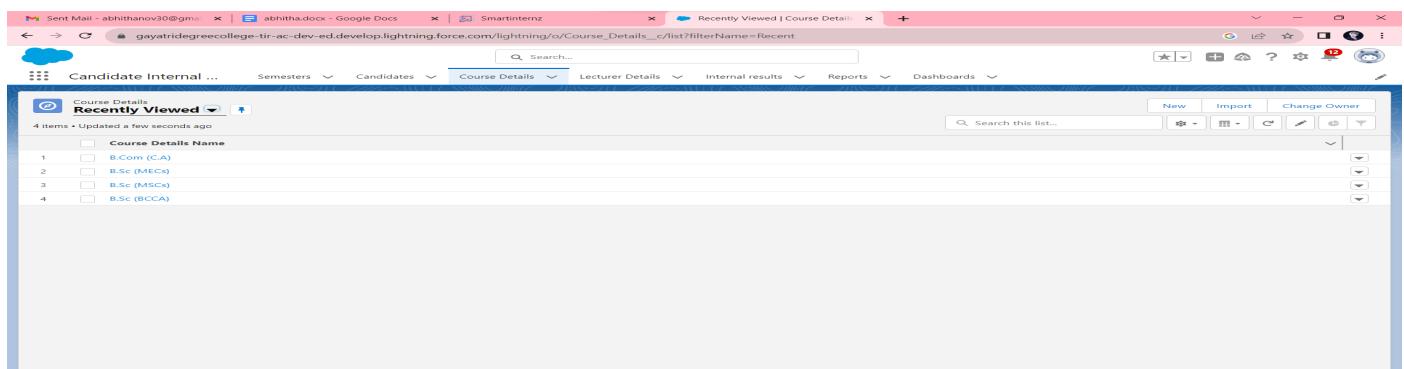
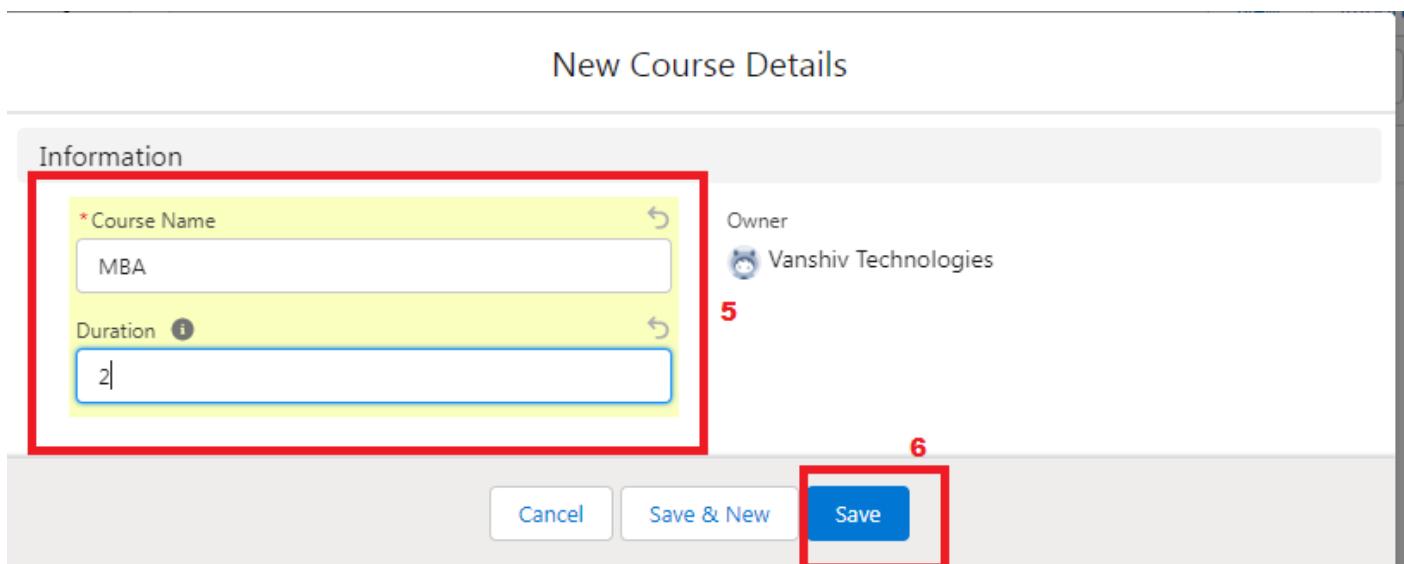
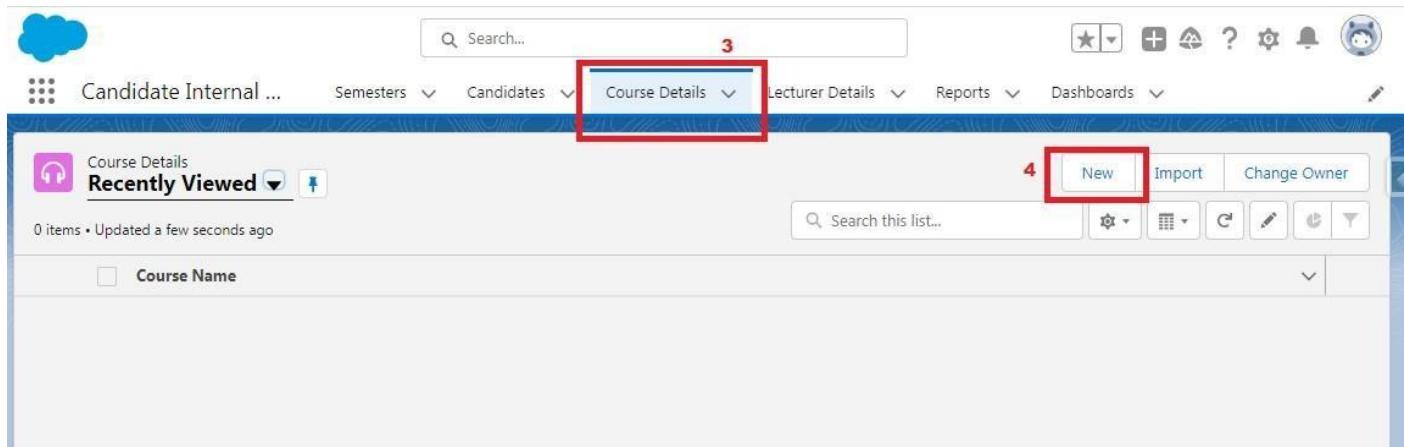
Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

## Create Record (Course Details)

Create Records on Course Details Objects

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.
3. Click on Course Details tab.
4. Click new button
5. Fill all Course Details record details.

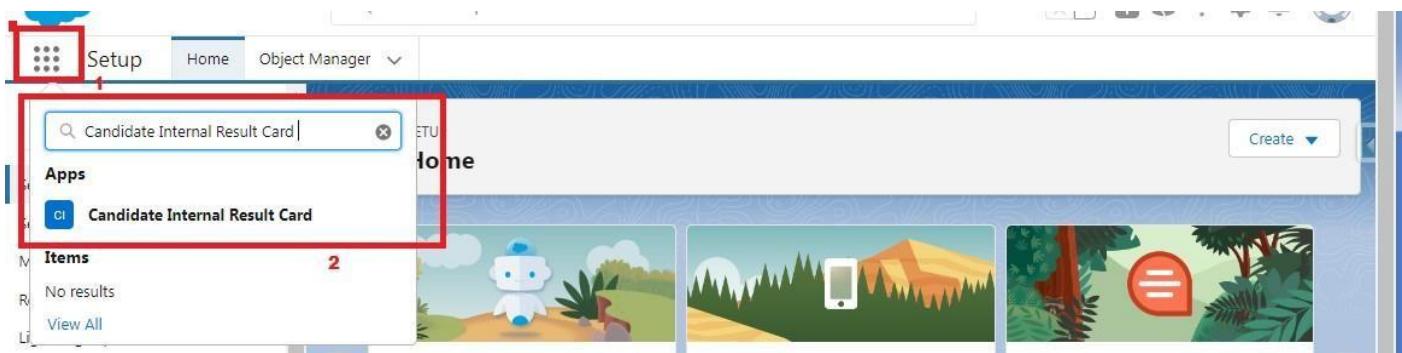
6. Click on Save Button.



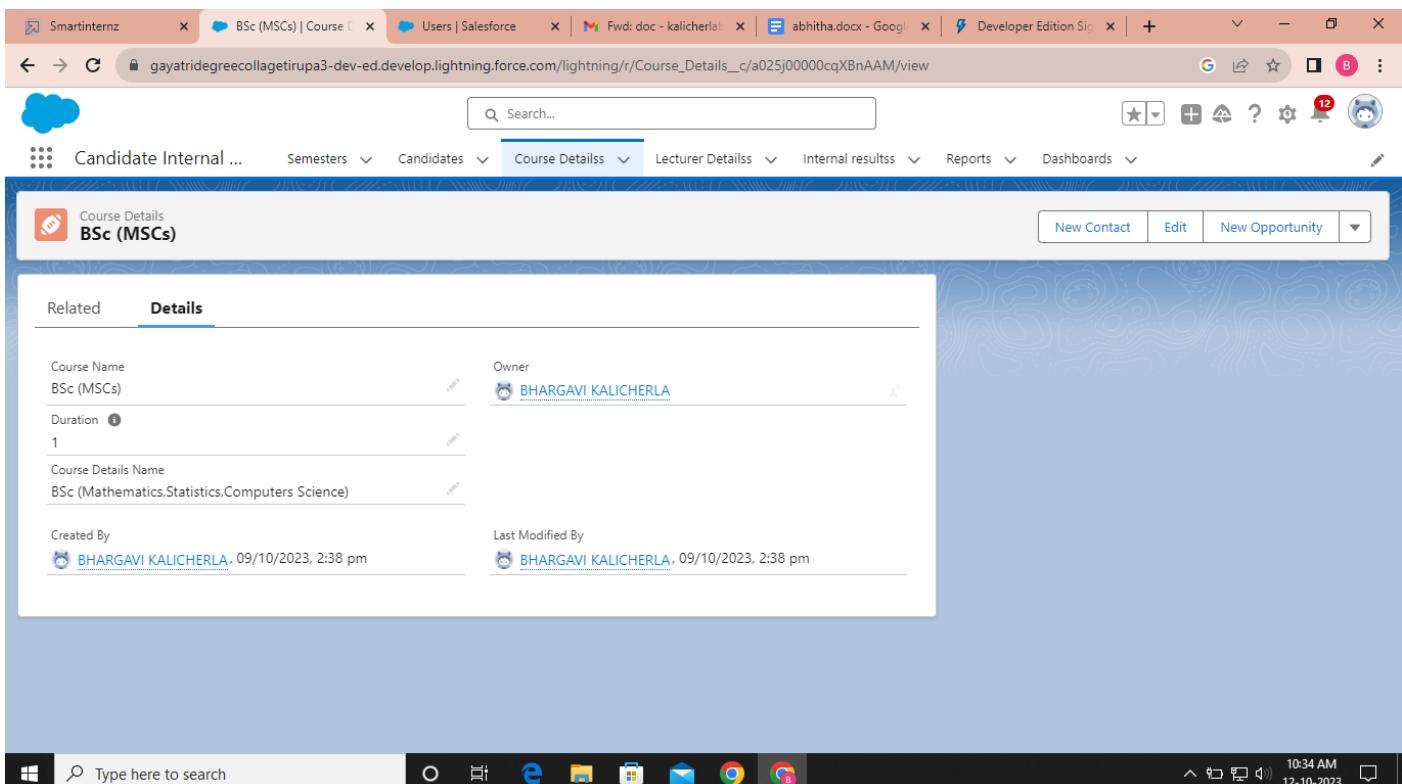
## View Record (Course Details)

Viewing the Records of Course Detail Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on any record name. you can see the details of the Driver



Candidate Internal ...				Semesters	Candidates <sup>3</sup>	Course Details	Lecturer Details	Reports	Dashboards			
				All	Import	Change Owner	Search this list...					
4 items • Sorted by Course Name • Filtered by All course details • Updated a few seconds ago												
1	Course Name ↑	Duration	Created Date									
1	BCA	3.00	09/04/2023, 7:39 pm									
2	BSc	3.00	09/04/2023, 7:39 pm									
3	Btech	4.00	09/04/2023, 7:38 pm									
4	MBA	2.00	09/04/2023, 7:38 pm									



The screenshot shows the Salesforce Lightning Experience. The URL in the browser is "gayatridegreecollagetirupatiramapuram-dev-ed.lightning.force.com/lightning/r/Course\_Details\_c/a025j00000cqXBnAAM/view". The page displays the "Course Details" record for "BSc (MSCs)". The record view includes fields for Course Name, Duration, Owner, and Last Modified By. The owner is listed as "BHARGAVI KALICHERLA". The last modified date is "09/10/2023, 2:38 pm".

## Delete Record (Course Details)

Deleting Records of Course Details Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

The screenshots show the following sequence:

- Step 1:** The App Launcher is open, showing the "Candidate Internal Result Card" app selected. A red box highlights the search bar and the app icon.
- Step 2:** The "Course Details" tab is selected. A red box highlights the "Course Details" tab in the navigation bar. A red arrow points to the "Edit" button next to the first row of data.
- Step 3:** The "Recently Viewed" section is shown. A red box highlights the "Delete" button in the context menu for the fourth item.

Course Name	Duration	Created Date
BCA	3.00	09/04/2023, 7:39 pm
BSc	3.00	09/04/2023, 7:39 pm
Btech	4.00	09/04/2023, 7:38 pm
MBA	2.00	09/04/2023, 7:38 pm

#### Milestone – 08: what are Reports?

## What Are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub-report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects. Once a report is created its report type cannot be changed.

There are 2 types of report types:

Standard Report Types: Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked. Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

Custom Report Types: Custom report types are reporting templates created to streamline the reporting

process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report.

The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

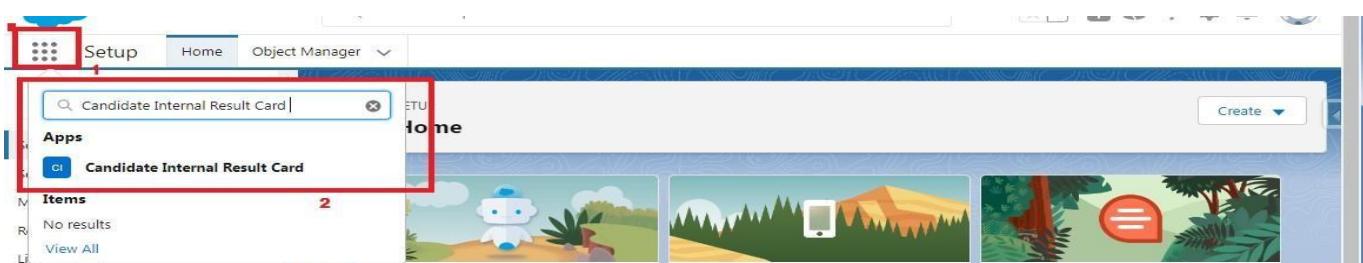
Viewer: With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report

Editor: With this access level, users can view .

Manager: With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

## Create Report

1. Click App Launcher
2. Select Candidate Internal Result Card App
3. Click reports tab
4. Click New Report.
5. Click the report type as Semesters with Course Click Start report.
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a Matrix Report).
7. Click refresh
8. Click save and run
9. Give report name – Candidate Internal Result Report
- 10.Click Save



The screenshot shows a navigation bar with several items: 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Reports' (which is highlighted with a red box), and 'Dashboards'. Below this is a search bar labeled 'Search recent reports...' and a button labeled 'New Report'.

This screenshot shows the report builder interface. On the left, there's a 'Fields' pane with sections for 'Groups' (highlighted with a red box) and 'Columns'. In the center is a preview area titled 'Semesters with Course' showing a table of student data. At the top right are buttons for 'Refresh' (highlighted with a red box), 'Save & Run' (highlighted with a red box), 'Save', 'Close', and 'Run'.

1. On the report builder page, locate the "Fields" pane on the left-hand side.
2. Find the field for which you want to create a bucket field and drag it to the report preview section.
3. Click on the field in the report preview to open the field properties.
4. In the field properties, locate the "Summarize" option and click the drop-down arrow.
5. Select "Bucket Field" from the available options.
6. In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.
7. Click "OK" or "Apply" to save the bucket field settings.
8. Customize the report layout and add any additional fields or filters as needed.
9. Once you are satisfied with the report setup, click "Save" to save the report.

This screenshot shows the 'Edit Bucket Column' dialog box. It has a 'Field' section with 'Course: Duration' selected and a 'Bucket Name' input field containing 'Duration'. Below this is a table for defining ranges and buckets. The table shows three rows: one for range ' $\leq$ ' with bucket 'Small Course', one for range '1 to' with bucket 'Medium Course', and one for range '2' with bucket 'Large Course'. There are 'Add' buttons between the first two rows. At the bottom, there's a checkbox 'Treat empty Course: Duration values in the report as zeros.' and a 'Cancel' and 'Apply' button.

## Save Report

\* Report Name  
Candidate Internal Result Report

Report Unique Name ⓘ  
Candidate\_Internal\_Result\_Report\_bky

Report Description

Cancel Save

## View Report

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.
3. Click on Reports Tab.
4. Click on Candidate Internal Result Report and see records.

Setup Home Object Manager

Candidate Internal Result Card

Items 2

No results

View All

ETU Home Create

Candidate Internal ... Semesters Candidates Course Details Lecturer Details Reports Dashboards

Recent 3

Search recent reports... New Report New Folder

REPORTS Report Name Description Folder Created By Created On Subscribed

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Properties with Customer Name Report		Private Reports		8/4/2023, 12:48 pm	
Created by Me	Events with Attendees		Private Reports		6/4/2023, 4:35 pm	
Private Reports	<b>Candidate Internal Result Report</b> 4	job application with candidate name	Private Reports		9/4/2023, 7:57 pm	
Public Reports			Private Reports		8/4/2023, 7:08 pm	
All Reports						

The screenshot shows a report titled "Report: Semesters with Course" under "Candidate Internal Result Report". The table displays course details across four semesters:

Course: Course Name	Semester: Semester Name	Course: Course Details Name	Duration
B.Com (Computer Applications) (1)	Sem - 03	B.Com (CA)	Large Course
B.Sc (Bio Technology, Chemistry, Computer Applications) (1)	Sem - 02	B.Sc (BCCA)	Small Course
B.Sc (Mathematics, Electronics, Computer Science) (1)	Sem - 01	B.Sc (MECs)	Medium Course
B.Sc (Mathematics, Statistics, Computer Science) (1)	Sem - 01	B.Sc (MSCs)	Small Course
<b>Total (4)</b>			

At the bottom, there are buttons for Row Counts, Detail Rows, Subtotals, and Grand Total.

## Milestone – 06: dashboards

# Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

## Create Dashboard

1. Click on Dashboards tab from the Candidate Internal Result Card application.
2. Click on new dashboard.
3. Give name- Candidate Internal Result Card
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Candidate Internal Result Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.

The screenshot shows the dashboard creation interface. The top navigation bar has several tabs: Travel Approval, Departments, Employee Details, Expenses, Expense Items, Reports, Dashboards (which is highlighted with a red box), and Travel Approvals. Below the navigation bar, there are sections for Dashboards (Recent, 3 items) and a search bar for recent dashboards. A large button labeled "New Dashboard" is also highlighted with a red box.

## New Dashboard

\* Name  
Candidate Internal Result Card |

Description 3

Folder  
Private Dashboards Select Folder

Cancel Create 4

Travel Approval Departments Employee Details Expenses Expense Items Reports Dashboards Travel Approvals

Employee Travel detail 5 + Component

+ Filter 6 Save Done

Add Component

Report Candidate Internal Result Report 7

Use chart settings from report

Display As 7

X-Axis Course: Course Name

Preview Candidate Internal Result Report

Record Count

Course: Course Name	Record Count
BCA	1
BSc	3
Btech	2
MBA	1

View Report (Candidate Internal Result Report)

Cancel Add 8

Sent Mail - abhithanov30@gmail.com | abhitha.docx - Google Docs | Smartinternz | Dashboards | Salesforce

Candidate Internal ... Semesters Candidates Course Details Lecturer Details Internal results Reports Dashboards

Dashboards Recent 1 item

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Candidate Internal Result Card		Private Dashboards	SREENIVASULU ABHITHA	9/10/2023, 2:25 pm	

Created by Me  
Private Dashboards  
All Dashboards  
Folders  
All Folders  
Created by Me  
Shared with Me  
Favorites  
All Favorites

# View Dashboard

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records

The screenshot shows the Salesforce interface with several key areas highlighted by red boxes:

- Step 1:** The App Launcher icon on the left navigation bar is highlighted with a red box.
- Step 2:** The search bar at the top of the page contains the text "Candidate Internal Result Card". A red box highlights the search bar, and the search results for "Candidate Internal Result Card" are shown in a modal window.
- Step 3:** The "Dashboards" tab in the top navigation bar is highlighted with a red box.
- Step 4:** The "Candidate Internal Result Card" dashboard is selected and highlighted with a red box. The dashboard itself displays various graphical components and data.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Properties with Customer Name Report	Customer Name Report	Private Dashboards		8/4/2023, 12:58 pm	
Created by Me	Job application with candidate name	candidate name	Private Dashboards		8/4/2023, 7:14 pm	
Private Dashboards	Events with Attendees	Events with Attendees	Private Dashboards		6/4/2023, 5:23 pm	
All Dashboards	Candidate Internal Result Card	4	Private Dashboards		9/4/2023, 8:00 pm	
FOLDERS	Travel Approval		Private Dashboards		1/4/2023, 12:58 pm	
All Folders	Employee Travel detail		Private Dashboards		8/4/2023, 12:22 pm	

Smarinternz Candidate Internal Re Users | Salesforce Fwd: doc - kalicherla abhitha.docx - Google Developer Edition Sig gayatridegreecollagetiruppa3-dev-ed.lightning.force.com/lightning/r/Dashboard/01Z5j0000009PVJEA2/view?queryScope=userFolders

Search... Candidate Internal ... Semesters Candidates Course Details Lecturer Details Internal results Reports Dashboards

Dashboard Candidate Internal Result Card As of 12-Oct-2023, 9:51 am Viewing as BHARGAVI KALICHERLA Refresh Edit Subscribe

Candidate Internal Result Report

Record Count

Course: Course Name

B.Com (C.A) BSc (BCCA) BSc (MECs) BSc (MSCs)

View Report (Candidate Internal Result Report)

Type here to search 10:35 AM 12-10-2023

THE END

