

INTERNSHIP TRACKER – SALESFORCE CRM IMPLEMENTATION

Phase 1: Internship Tracker Project

Project Overview

Industry: Education

Project Type: Salesforce CRM Implementation

Target Users: Placement Officers, Students, Recruiters/Companies

Problem Statement

Universities and training institutes often face difficulties in tracking internship opportunities, student applications, and recruiter interactions. Manual processes using spreadsheets and emails lead to missed deadlines, miscommunication, and poor placement outcomes.

The institute requires a Salesforce-based Internship Tracker to:

- Manage internship postings
- Allow students to apply and track applications
- Enable recruiters to shortlist and finalise candidates
- Provide real-time dashboards for placement officers

Use Cases

- **Internship Posting:** Recruiters/Placement Officers add opportunities into the system.
- **Student Applications:** Students apply for available internships and receive notifications.
- **Review & Shortlisting:** Placement Officers review and forward shortlisted students.
- **Recruiter Selection:** Recruiters finalise candidates and update statuses.
- **Reporting:** Placement Officers monitor student applications, recruiter participation, and placement outcomes.

Phase 1: Problem Understanding & Industry Analysis

Step 1: Requirement Gathering

- Identified challenges with manual tracking, missed deadlines, and a lack of transparency.
- Documented the need for an automated Salesforce-based solution.

Step 2: Stakeholder Analysis

Placement Officer: Posts internships, monitors progress, and manages shortlisting.

Students: Apply for internships, receive updates, and track application status. **Recruiters:** Post opportunities, shortlist candidates, and finalise selections.

Step 3: Business Process Mapping

Workflow: Internship Posting → Student Applications → Review → Shortlisting → Recruiter Final Selection → Reporting.

Step 4: Industry Use Case Analysis

Created a Custom Object (Use Case Analysis) with sample records:

- **Universities** – Challenges: Manual tracking of student progress. Solution: Centralised internship tracker.
- **Recruiters** – Challenges: Difficulty in filtering the right students quickly. Solution: System-based shortlisting by skills & criteria.
- **EdTech Platforms** – Challenges: Online internships lack structure & validation. Solution:

Platform-based internship tracking & feedback system.

Step 5: AppExchange Exploration

- Explored AppExchange to identify existing solutions.
- Found Enrollment Rx Core – Higher Education CRM and similar education cloud apps.- Gap Identified: Most solutions cover admissions/education management, but not internship-specific tracking.
- Deliverable: Screenshots of AppExchange apps uploaded into Salesforce Files.

Phase 1 Deliverables

- Requirements documented in Notes.
- Stakeholders identified (Placement Officer, Student, Recruiter).
- Internship process mapped in Salesforce.
- Custom Object records created for Industry Use Cases.
- AppExchange exploration screenshots uploaded to Salesforce Files.

Phase 2 : Org Setup & Configuration

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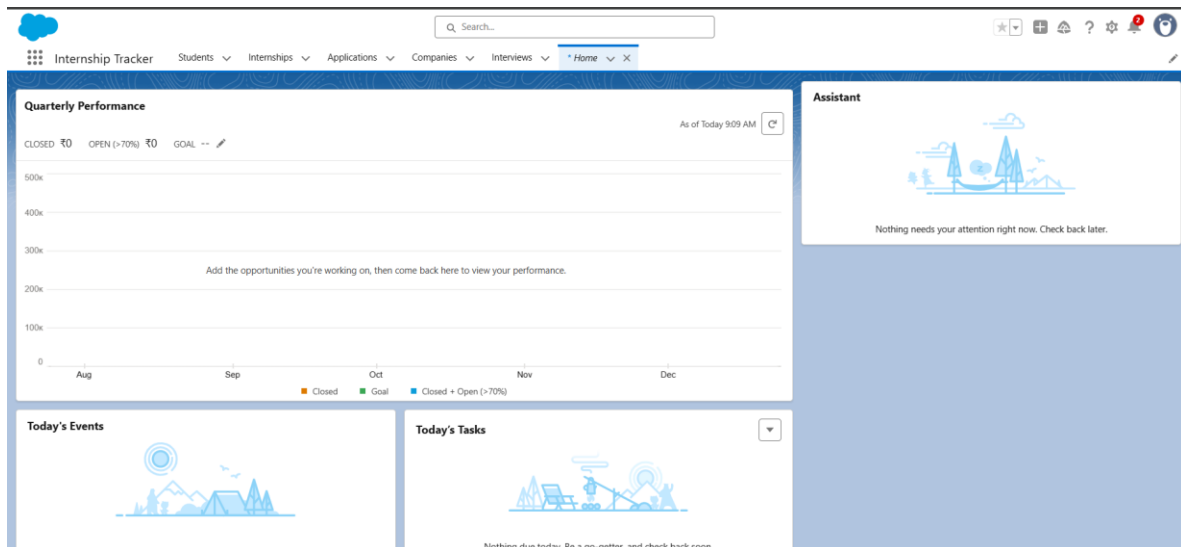
1. Objective

The objective of Phase 2 is to set up and configure the Salesforce Developer Org for the Internship Tracker project. This ensures that all organization details, user roles, profiles, permissions, and sharing models are aligned with the university placement process.

2. Salesforce Edition

A Salesforce Developer Org was chosen for implementation.
This environment provides:

- All core functionalities required for CRM customization
- Development, testing, and deployment capabilities
- Free lifetime access, suitable for academic/portfolio projects



3. Company Profile Setup

Configured details in Company Information:

- Organization Name: University/Institute Name
- Default Time Zone: Local time zone
- Language: English (or chosen language)
- Currency: INR (or USD depending on use case)
- Fiscal Year: Configured as academic cycle-based

The screenshot shows the 'Company Information' setup page. The page is titled 'Company Information' and 'Internship Tracker'. It contains a form for configuring the organization's profile. The form is divided into two main sections: 'Organization Detail' and 'System Settings'.

Organization Detail:

- Organization Name: Internship Tracker
- Primary Contact: Placement Officer (Admin)
- Address: United States
- Fiscal Year Starts In: January
- Activate Multiple Currencies: ☐
- Enable Data Translation: ☐
- Newsletter: ☒
- Admin Newsletter: ☒
- Hide Notices About System Maintenance: ☐
- Hide Notices About System Downtime: ☐
- Locale Formats: ICU

System Settings:

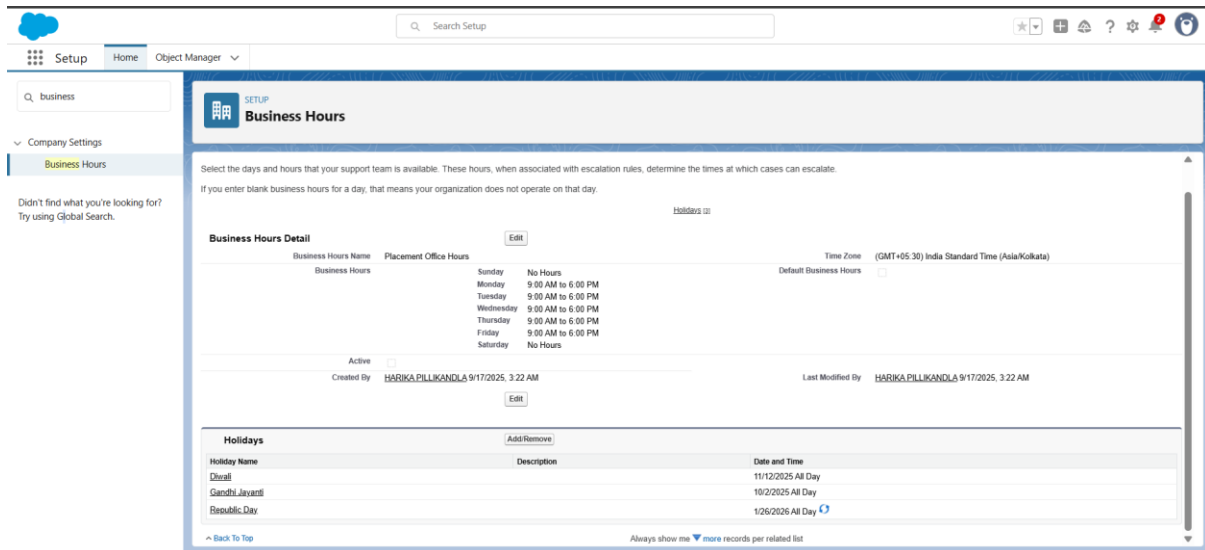
- Phone:
- Fax:
- Default Locale: English (United States)
- Default Language: English
- Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Currency Locale: English (India) - INR
- Used Data Space: 350 KB (7%) [View]
- Used File Space: 575 KB (3%) [View]
- API Requests, Last 24 Hours: 0 (15,000 max)
- Streaming API Events, Last 24 Hours: 0 (15,000 max)
- Restricted Logins, Current Month: 0 (0 max)
- Salesforce.com Organization ID: 00Dg1.000000BYDm8
- Organization Edition: Developer Edition
- Instance: CAN98

Created By: OrgTeam EPIC, 5/12/2025, 11:15 PM

Modified By: HARSHA PILLUKANDLA, 9/18/2025, 7:34 AM

4. Business Hours & Holidays

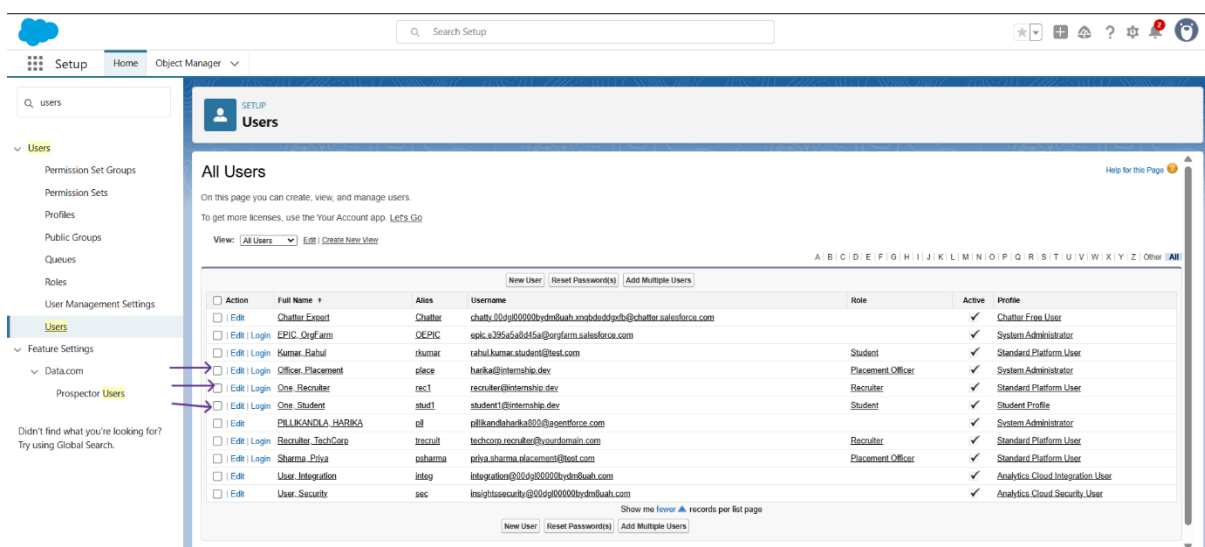
- Defined Business Hours: Mon–Fri, 9 AM – 5 PM
- Added Holidays: University holidays, exam breaks, public holidays



5. User Setup

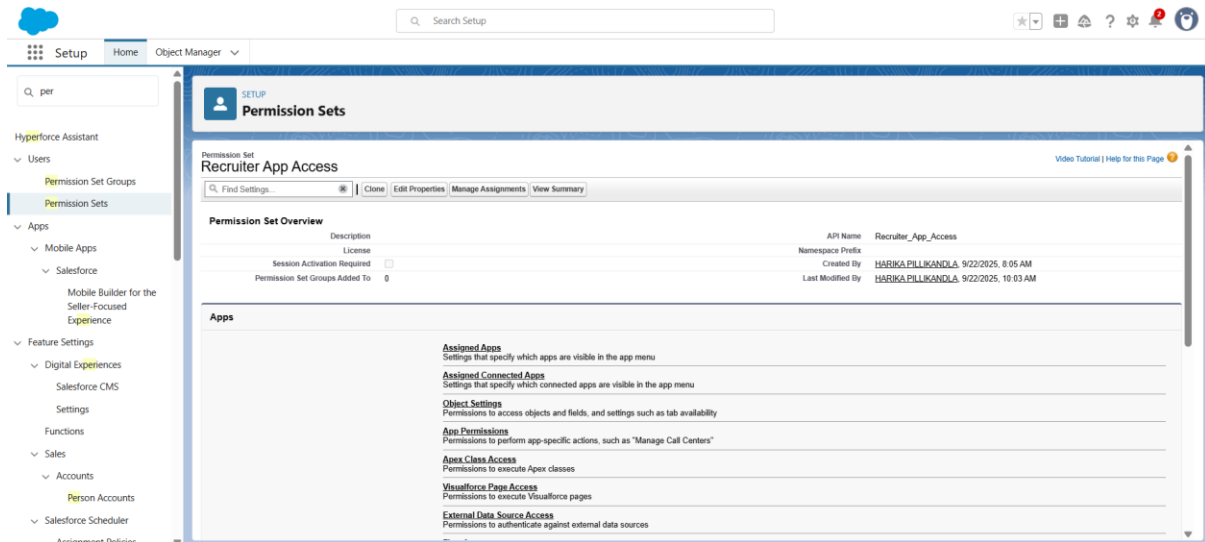
Created users to represent stakeholders:

- **Placement Officer** – Admin privileges
- **Students** – Limited access, can apply & view own records
- **Recruiters** – External access for posting internships & reviewing applications



6. Profiles & Permission Sets

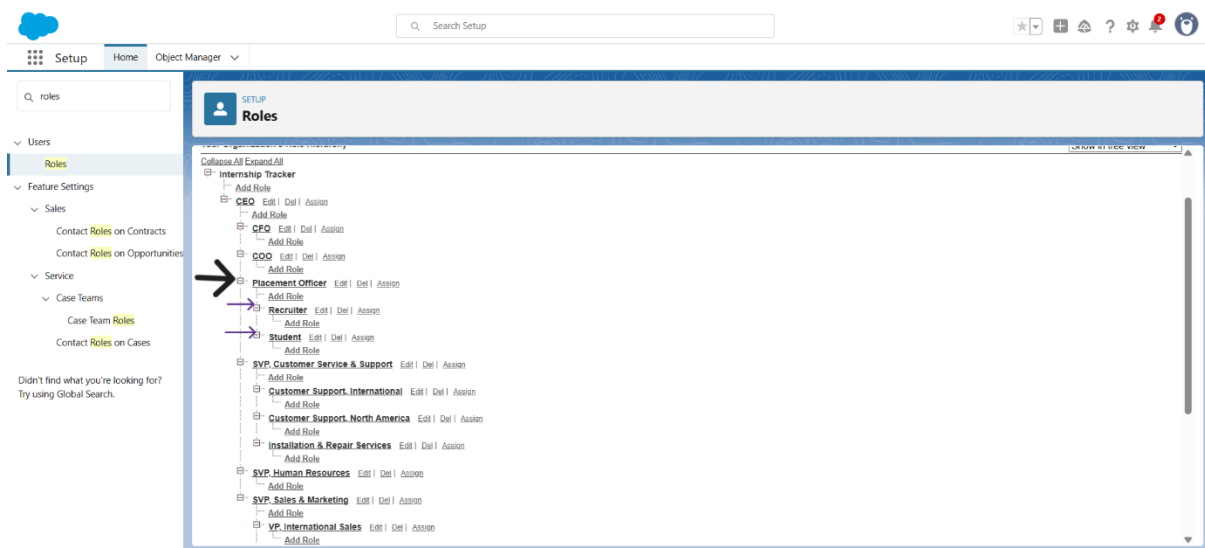
- **Profiles:** Defined baseline access for Students, Recruiters, Placement Officer
- **Permission Sets:** Used for special access (like Reports/Dashboards)



7. Roles

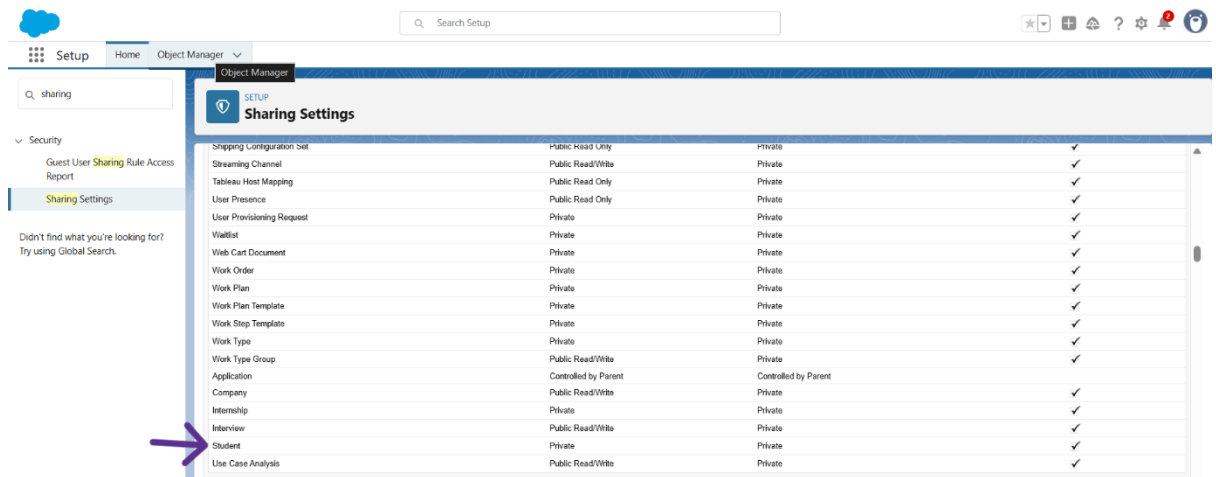
Created a Role Hierarchy:

- **Placement Officer** – Top level (full access)
- **Students** – Below officer (limited access)
- **Recruiters** – Parallel to students (independent access)



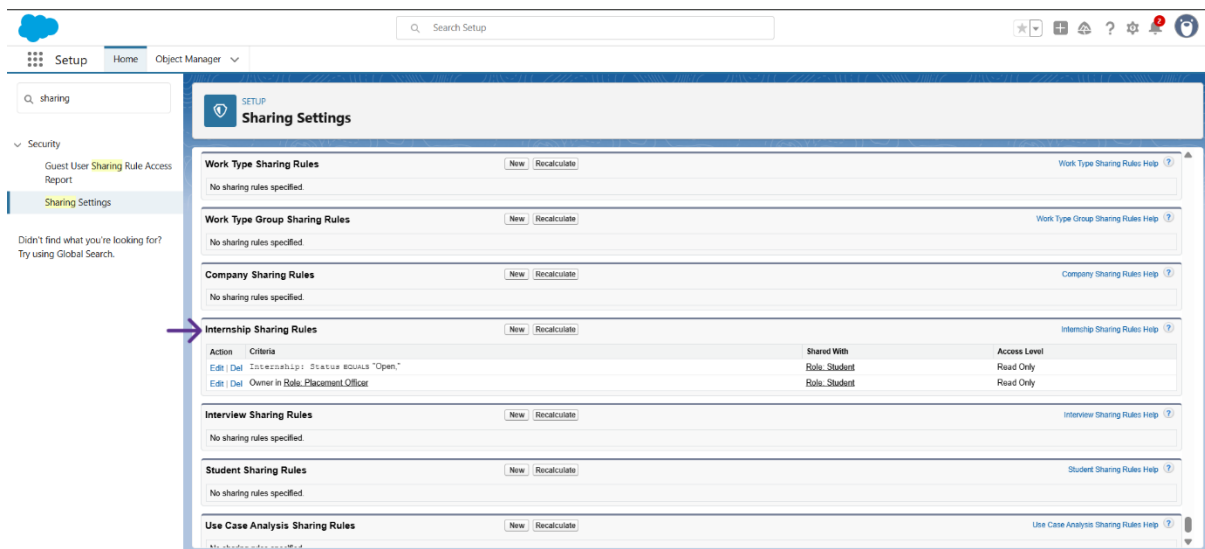
8. Organization-Wide Defaults (OWD) & Sharing Rules

- OWD set to:
 - **Students** → **Private** (can only see their own applications)
 - **Placement Officer** → **Full access via role hierarchy**
- Sharing rules allow Recruiters to view relevant Internship records



9. Sandbox & Deployment Basics

- Created a Sandbox for testing customizations safely
- Planned to use Change Sets to migrate from Sandbox to Production



10. Outcomes

At the end of Phase 2:

- A secure Salesforce environment was established
- Clear role hierarchy between Placement Officer, Students, and Recruiters
- OWD and sharing ensured data privacy while supporting collaboration
- Foundation ready for Phase 3 (Data Modeling)

11. Deliverables

- Phase 2 Documentation (this file)
- Configured Salesforce Org with:
 - Users, Roles, and Profiles
 - OWD & Sharing Rules
 - Business Hours & Holidays
- Sandbox ready for development

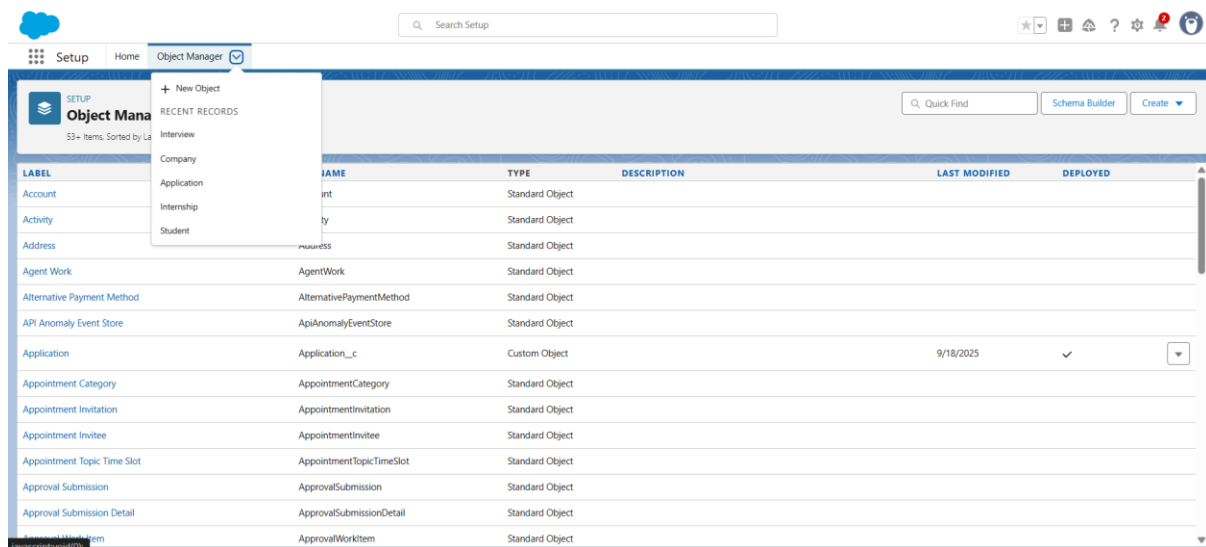
Phase 3 – Data Modeling & Relationships Requirements

1. Custom Objects

You need to create and document the following objects:

- **Student** – stores student details (name, contact info, skills, etc.)
- **Company** – stores recruiter/company details
- **Internship** – stores internship details (role, stipend, skills required, status)
- **Application** – stores student applications to internships
- **Interview** – junction object linking Student and Company for interviews

Requirement: Each object must include all necessary fields relevant to the workflow.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar shows a list of objects with a search bar and a 'Create' button. The main table lists objects with columns: NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Application' object is highlighted.

NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Activity	Standard Object			
Address	Standard Object			
Agent Work	Standard Object			
Alternative Payment Method	Standard Object			
API Anomaly Event Store	Standard Object			
Application	Custom Object		9/18/2025	✓
Appointment Category	Standard Object			
Appointment Invitation	Standard Object			
Appointment Invitee	Standard Object			
Appointment Topic Time Slot	Standard Object			
Approval Submission	Standard Object			
Approval Submission Detail	Standard Object			
Approval Work Item	Standard Object			

2. Fields & Relationships

For each object, you must define relevant fields. Examples:

Object	Key Fields
Student	Name, Email, Contact, Skills, GPA, Application Lookup
Company	Name, Contact Person, Email, Industry
Internship	Role, Skills Required, Stipend, Status (Open/Closed), Record Type
Application	Student Lookup, Internship Lookup, Status, Applied Date
Interview	Student Lookup, Company Lookup, Interview Date, Feedback

Requirement: Include field type, required/not required, and relationships.

The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' for the 'Student' object. The 'Fields & Relationships' tab is selected, displaying a list of 9 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: Course (Picklist), Created By (Lookup(User)), Email (Text(50)), Last Modified By (Lookup(User)), Name (Auto Number), Owner (Lookup(User,Group)), Phone (Phone), Skills (Text Area(255)), and Student Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Auto Number		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Skills	Skills__c	Text Area(255)		
Student Name	Name	Text(80)		✓

Setup

Home

Object Manager

Search Setup

Star

Grid

Help

Settings

Notifications

User

Setup > OBJECT MANAGER

Company

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

6 Items. Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Company Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Industry	Industry__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(50)		
Owner	OwnerId	Lookup(User,Group)		✓

Setup

Home

Object Manager

Search Setup

Star

Grid

Help

Settings

Notifications

User

Setup > OBJECT MANAGER

Internship

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Fields & Relationships

11 Items. Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Company	Company__c	Text(50)		
Created By	CreatedById	Lookup(User)		
Internship Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Auto Number		
Owner	OwnerId	Lookup(User,Group)		✓
Package	Package__c	Currency(18, 0)		
Record Type	RecordTypeId	Record Type		✓
Role	Role__c	Text(50)		
Status	Status__c	Picklist		
Stipend	Stipend__c	Currency(18, 0)		

Setup

Home

Object Manager

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Setup > OBJECT MANAGER

Application

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9 Items. Sorted by Field Label

Q, Quick Find

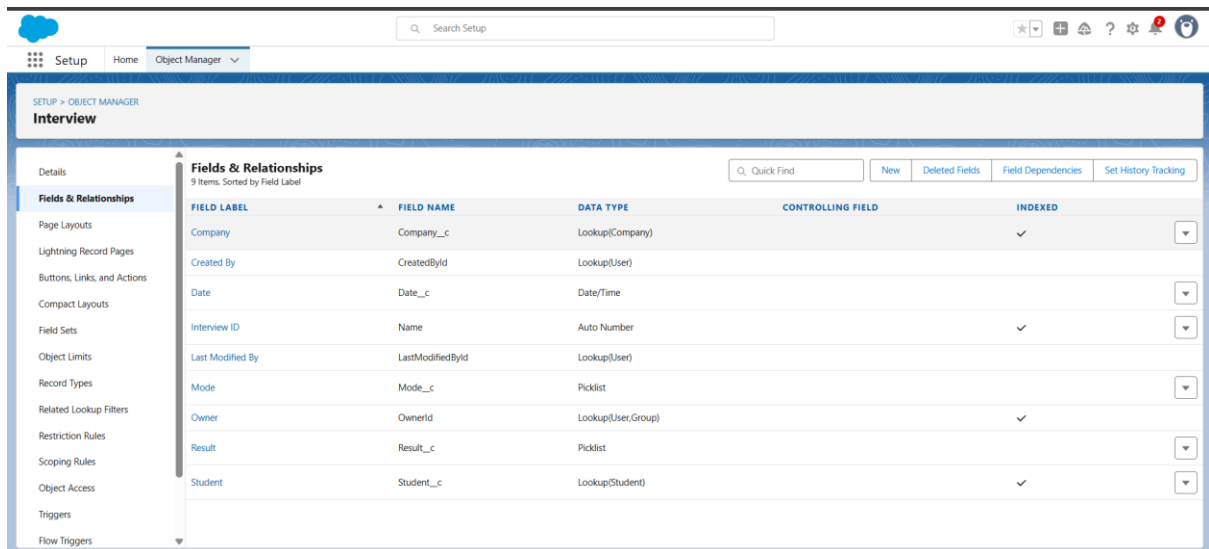
New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Application Key	Application_Key__c	Text(100)		
Application Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Date Applied	Date_Applied__c	Date		
Internship	Internship__c	Master-Detail(Internship)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Auto Number		
Status	Status__c	Picklist		
Student	Student__c	Lookup(Student)		✓



Setup > OBJECT MANAGER
Interview

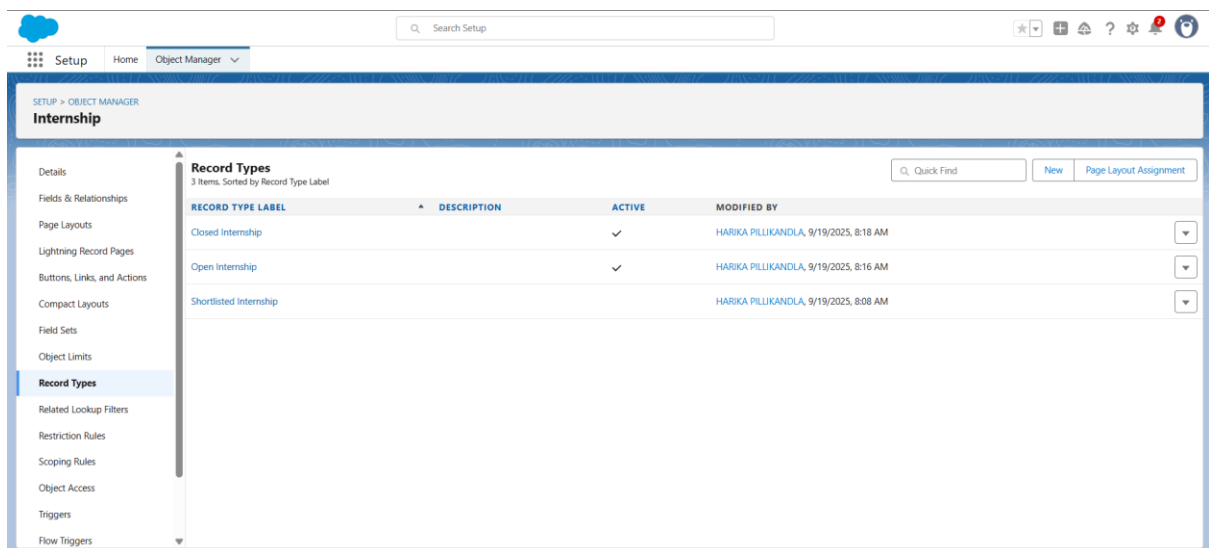
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Scoping Rules
Object Access
Triggers
Flow Triggers

Fields & Relationships
9 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Company	Company__c	Lookup(Company)		✓
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date/Time		
Interview ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Mode	Mode__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Result	Result__c	Picklist		
Student	Student__c	Lookup(Student)		✓

3. Record Types

- **Internship object must have record types:** Open, Closed, Shortlisted
- **Requirement:** Show record type setup for workflows and approval automation.



Setup > OBJECT MANAGER
Internship

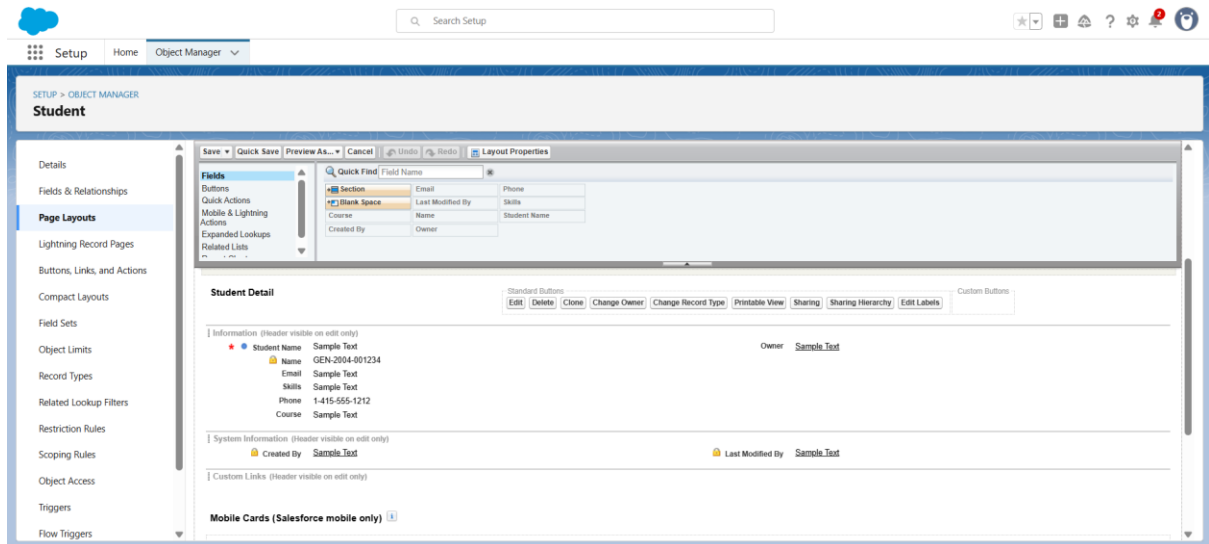
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers

Record Types
3 Items. Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Closed Internship		✓	HARIKA PILLIKANDLA, 9/19/2025, 8:18 AM
Open Internship		✓	HARIKA PILLIKANDLA, 9/19/2025, 8:16 AM
Shortlisted Internship			HARIKA PILLIKANDLA, 9/19/2025, 8:08 AM

4. Page Layouts

- **Student Layout** – Fields for Placement Officers to view applications
- **Internship Layout** – Fields for Recruiters/Officers to view internship info
- **Requirement:** Include screenshots showing fields arrangement and sections.

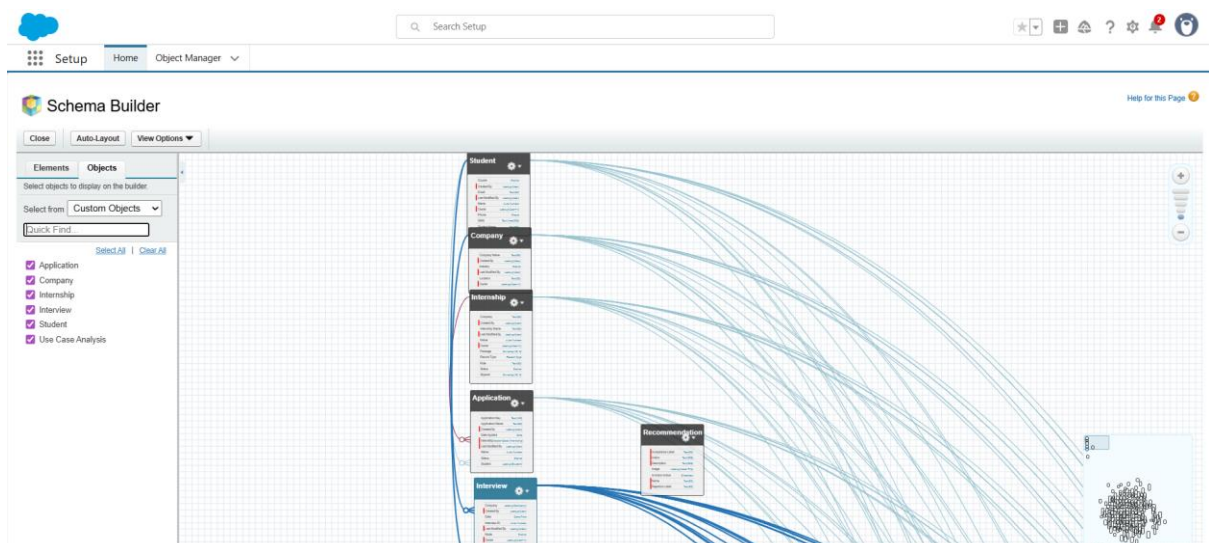


5. Relationships

Define object relationships:

- **Lookup Relationship:** Student → Application
- **Master-Detail Relationship:** Application → Internship
- **Junction Object:** Interview links Student and Company

Requirement: Show relationships in Schema Builder with all relevant objects.



6. Schema Builder

- **Requirement:** Create a visual diagram showing all objects and their relationships.
- Include all fields and relationships, and show junction objects.

7. Validation & Rules (Optional)

- Include any unique fields, lookup validations related to the data model.
- **Example:** Prevent duplicate applications using unique Student–Internship combination.

8. Deliverables

1. **Custom Objects** – List of objects and their purpose
2. **Fields** – Key fields for each object
3. **Record Types** – Setup for Internship object
4. **Page Layouts** – Screenshots of Student & Internship layouts
5. **Relationships** – Schema Builder diagram
6. **Optional:** Notes on validation rules, field-level security

Phase 4: Process Automation (Admin Tools)

Purpose

This phase focuses on automating key business processes using declarative (admin-friendly) tools in Salesforce. The goal is to reduce manual effort, enforce data integrity, and ensure timely communication between students, recruiters, and placement officers.

Key Components

- Validation Rules
- Workflow Rules
- Process Builder
- Approval Processes
- Record-Triggered Flows
- Email Alerts & Custom Notifications

Implementation Steps

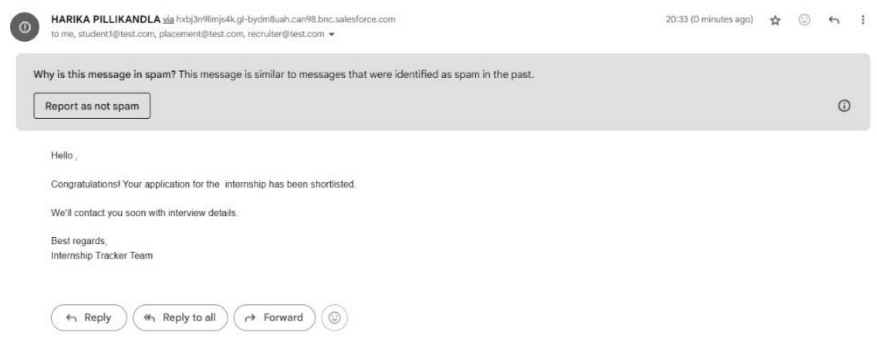
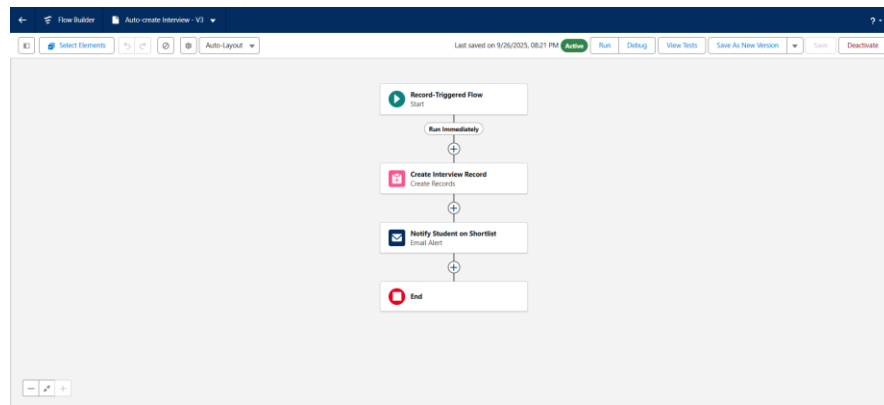
1. Validation Rules

- Prevent duplicate applications by checking if a student has already applied to the same internship.
- Ensure stipend is greater than zero for paid internships.
- Validate mandatory fields like application date and student email.

The screenshot displays the 'New Application' form in Salesforce. The form includes fields for 'Application Name' (containing 'App-22'), 'Student' (a dropdown menu showing 'Neha'), 'Internship' (a dropdown menu showing 'Cyber Security'), 'Status' (a dropdown menu showing 'Applied'), and 'Date Applied' (containing '9/26/2025'). A red error message box is overlaid on the form, stating 'We hit a snag.' and 'Review the errors on this page.' with a bullet point: 'This student has already applied to this internship.' The form also has a 'Cancel' button, a 'Save & New' button, and a 'Save' button.

2. Workflow Rules

- Trigger email alerts to recruiters when a new internship is posted.
- Automatically update internship status to “Closed” when the end date passes.



3. Process Builder

- Auto-update application status to “Under Review” when a student applies.
- Set internship status to “Filled” when maximum applications are reached.

4. Approval Process

- Applications with stipend > ₹50,000 require approval from the Internship Officer.
- Includes initial submission, approval/rejection steps, and final status update.

5. Record-Triggered Flow

- Auto-create Interview__c record when Application__c status changes to “Shortlisted”.
- Send email to student with interview details.

6. Email Alerts & Notifications

- Notify students when their application is approved or rejected.
- Alert Internship Officer when new high-value applications are submitted.

Impact

- Reduces manual tracking and errors.
- Ensures consistent data entry and validation.
- Improves communication and transparency.
- Enhances user experience with timely updates.

Phase 5: Apex Programming (Developer Tools)

Purpose

This phase introduces custom backend logic using Apex to handle complex scenarios that cannot be achieved through declarative tools. It ensures scalability, performance, and precise control over data operations.

Key Components

- Apex Classes
- Triggers
- SOQL/SOSL Queries
- Collections
- Batch, Queueable, and Scheduled Apex
- Exception Handling & Test Coverage

Implementation Steps

1. Apex Classes

- ApplicationManager: Handles application logic like filtering and reporting.
- PlacementReportGenerator: Generates placement statistics.

2. Apex Trigger

- Prevents duplicate student applications using composite key logic.
- Trigger Code:

```
trigger PreventDuplicateApplications on Application__c (before insert) {  
    Set<String> studentInternshipPairs = new Set<String>();  
    for (Application__c app : Trigger.new) {  
        if (app.Student__c != null && app.Internship__c != null) {  
            String key = app.Student__c + '-' + app.Internship__c;  
            studentInternshipPairs.add(key);  
        }  
    }  
    List<Application__c> existingApps = [
```

```

SELECT Id, Student__c, Internship__c

FROM Application__c

WHERE Student__c IN :studentInternshipPairs

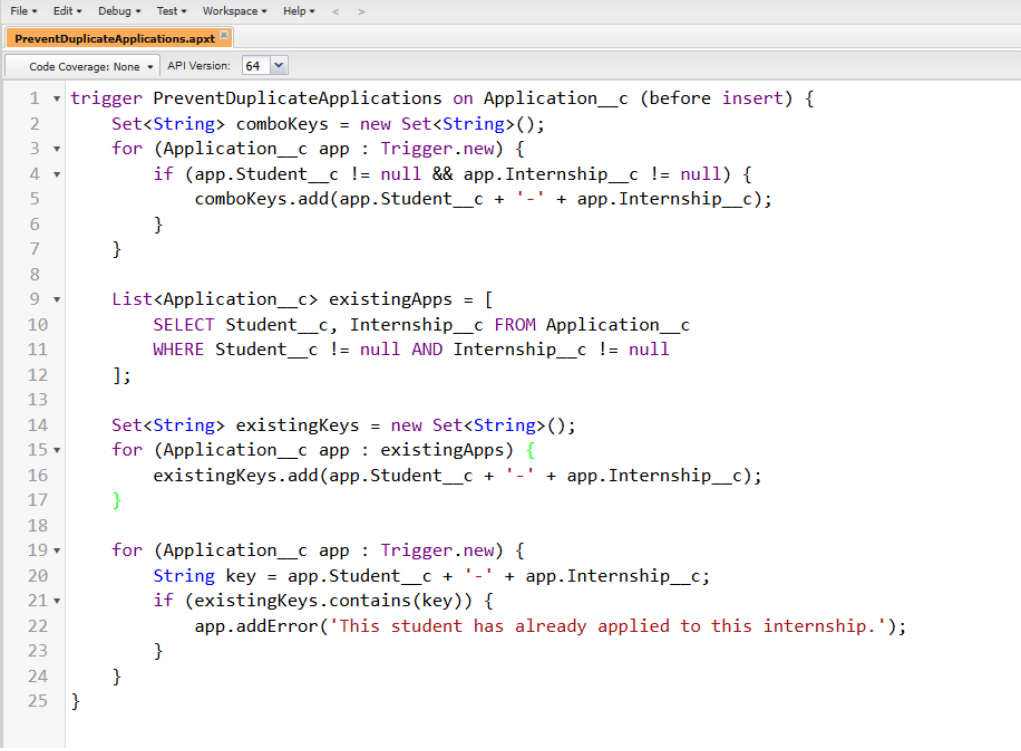
];

for (Application__c app : Trigger.new) {

    String key = app.Student__c + '-' + app.Internship__c;

    if (existingApps.anyMatch(e => e.Student__c + '-' + e.Internship__c ==
key)) {

        app.addError('This student has already applied to this internship.');
```



```

File Edit Debug Test Workspace Help < >
PreventDuplicateApplications.apxt
Code Coverage: None API Version: 64
1 trigger PreventDuplicateApplications on Application__c (before insert) {
2     Set<String> comboKeys = new Set<String>();
3     for (Application__c app : Trigger.new) {
4         if (app.Student__c != null && app.Internship__c != null) {
5             comboKeys.add(app.Student__c + '-' + app.Internship__c);
6         }
7     }
8
9     List<Application__c> existingApps = [
10         SELECT Student__c, Internship__c FROM Application__c
11         WHERE Student__c != null AND Internship__c != null
12     ];
13
14     Set<String> existingKeys = new Set<String>();
15     for (Application__c app : existingApps) {
16         existingKeys.add(app.Student__c + '-' + app.Internship__c);
17     }
18
19     for (Application__c app : Trigger.new) {
20         String key = app.Student__c + '-' + app.Internship__c;
21         if (existingKeys.contains(key)) {
22             app.addError('This student has already applied to this internship.');
```

New Application

* = Required Information

Information

* Application Name ↶

Name

Student ↶

* Internship ↶

Status ↶

Date Applied ↶

Application Key ↶

ⓘ We hit a snag.

Review the errors on this page.

- This student has already applied to this internship.

⛔

1. Collections

- Use Lists to store shortlisted students.
- Use Maps to group applications by internship ID.

2. Batch & Queueable Apex

- Batch job to update internship status nightly.
- Queueable job to sync recruiter data from external system.

3. Scheduled Apex

- Run nightly job to check for expired internships and update status.

4. Exception Handling & Test Coverage

- Use try-catch blocks to handle null pointer or DML exceptions.
- Write test classes with 75%+ coverage for all triggers and classes.

Impact

- Enables advanced logic and automation.
- Improves data accuracy and performance.
- Supports bulk operations and async processing.

- Ensures reliability through robust testing.

Phase 6: User Interface Development

Purpose

This phase focuses on building a clean, intuitive, and role-based user interface using Lightning App Builder and custom components. The goal is to ensure that students, recruiters, and internship officers can interact with the system efficiently and enjoyably.

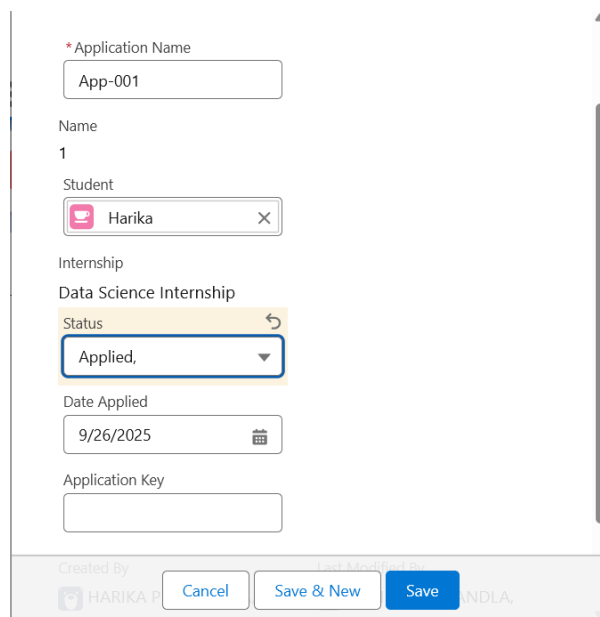
Key Components

- Lightning App Builder
- Custom Record Pages
- Tabs and Utility Bar
- Lightning Web Components (LWC)
- Wire Adapters and Imperative Apex
- Navigation Service

Implementation Steps

1. Lightning App Builder

- Created a custom app named Internship Tracker.
- Added tabs for Students, Internships, Applications, and Interviews.
- Configured branding and set the app as default for relevant profiles.



The screenshot displays the Lightning App Builder interface for creating a new application record. The form includes the following fields and components:

- *Application Name:** A text input field containing "App-001".
- Name:** A section header with the value "1".
- Student:** A lookup field showing a contact named "Harika" with a red 'X' icon to remove it.
- Internship:** A text input field containing "Data Science Internship".
- Status:** A dropdown menu with "Applied," selected and a refresh icon to the right.
- Date Applied:** A date picker field showing "9/26/2025".
- Application Key:** An empty text input field.

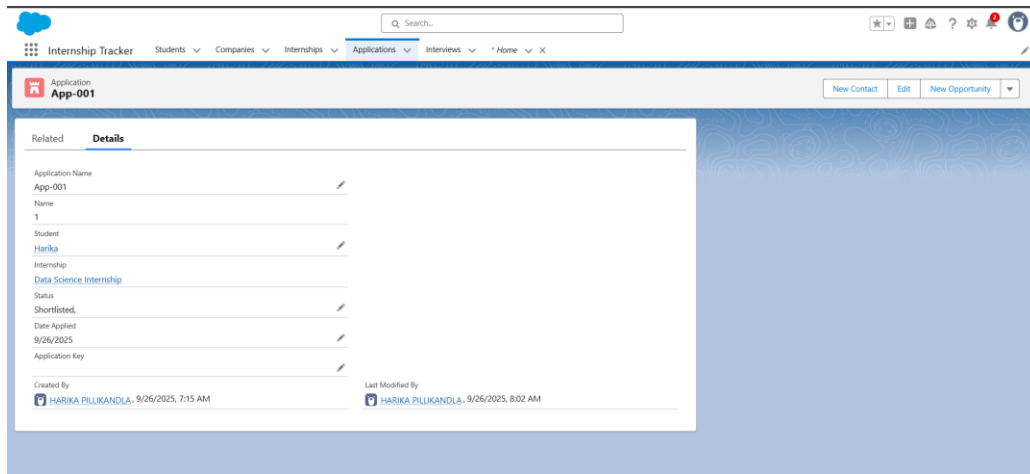
At the bottom of the form, there is a footer bar with the following elements:

- Created By:** A field showing "HARIKA P".
- Last Modified By:** A field showing "NDLA".
- Buttons:** "Cancel", "Save & New", and "Save".

2. Custom Record Pages

- Designed record pages for Student__c, Internship__c, and Application__c.

- Included related lists, quick actions, and highlight panels.
- Used dynamic visibility rules to show/hide components based on user role.



3. Tabs and Utility Bar

- Tabs: Added navigation for each object and dashboard.
- Utility Bar: Included a **Notifications tab** and a **Quick Dashboard tab** for real-time insights.

4. Lightning Web Components

- **Upcoming Interviews Component:** Displays interviews scheduled for the logged-in student.
- **Internship Summary Card:** Shows internship details and application count for recruiters.

5. Wire Adapters and Imperative Apex

- Used `@wire` to fetch internship data based on filters (e.g., location, stipend).
- Used imperative Apex to fetch student applications on button click for recruiters.

6. Navigation Service

- Implemented navigation from dashboard to specific internship records.
- Redirected users to `Application__c` record after successful submission.

Impact

- Provides a modern, responsive UI tailored to each user role.
- Improves usability and reduces training time.
- Enhances visibility into key data like interviews and application status.

Phase 7: Integration & External Access

Purpose

This phase connects Salesforce with external systems to simulate real-world integrations. It enables secure data exchange, real-time updates, and external access for recruiters—all while maintaining platform security and scalability.

Key Components

- Named Credentials & External Services
- REST Callouts
- Platform Events & Change Data Capture (CDC)
- Salesforce Connect
- OAuth Authentication

Implementation Steps

1. Named Credentials & External Services

- Created a Named Credential for a mock recruiter API.
- Configured authentication type (e.g., OAuth 2.0 or Password).
- Used External Services to define schema and auto-generate Apex actions.

2. REST Callouts

- Developed Apex class to perform GET callout to fetch recruiter details.
- POST callout used to send selected student data to external HR system.
- Handled response parsing and error logging.

3. Platform Events & CDC

- Defined a Platform Event: InternshipStatusChanged__e.
- Published event when internship status changes to “Filled”.
- Subscribed to student record changes using CDC to trigger notifications.

4. Salesforce Connect

- Linked to an external student database using OData.
- Displayed external student records in a related list on Student__c page.
- Enabled read-only access for recruiters to view external profiles.

5. OAuth Authentication

- Enabled secure login for recruiters via OAuth flow.
- Configured connected app with scopes and callback URL.
- Stored access tokens securely and refreshed them as needed.

Impact

- Enables seamless integration with external systems.
- Supports real-time updates and event-driven architecture.
- Provides secure access for external users like recruiters.
- Demonstrates enterprise-grade connectivity and scalability.

Phase 8: Reports & Dashboards

Purpose

This phase ensures that your system is populated with accurate data, protected against duplication, and ready for deployment. It also introduces version control and packaging strategies to support scalability and portability.

Key Components

- Data Import Wizard & Data Loader
- Duplicate Rules
- Data Export & Backup
- Change Sets
- Managed vs Unmanaged Packages
- VS Code & SFDX Setup

Implementation Steps

1. UI-Based Data Input

- Student__c and Internship__c records were created directly through the Salesforce UI to ensure clean and controlled demo data.
- Key fields like Name, Email, Skills, Stipend, and Location were manually populated for each record.
- This approach supports testing of validation rules, duplicate prevention, and reporting accuracy without relying on CSV imports.

The screenshot displays the Salesforce interface for the 'Internship Tracker' app. The top navigation bar includes a search bar and a menu with options like 'Students', 'Companies', 'Internships', 'Applications', 'Interviews', 'Home', and 'Dashboards'. The main content area shows the 'Details' tab for a 'Student' record named 'Harika'. The record fields are as follows:

Field	Value	Action
Student Name	Harika	
Name	1	
Email	pillikandlaharika@gmail.com	
Skills	Html,C,python	<input checked="" type="checkbox"/>
Phone		
Course	B.Tech	
Created By	HARIKA PILLIKANDLA - 9/26/2025, 7:14 AM	
Last Modified By	HARIKA PILLIKANDLA - 9/26/2025, 11:51 AM	

2. Data Loader

- Used for bulk import of Application__c and Interview__c records.

- Ensured CSV files were clean and matched field API names.
- Logged success and error files for audit.

3. Duplicate Rules

- Created rules for Student__c to prevent duplicate entries based on Email and Phone.
- Enabled fuzzy matching and alert messages.
- Tested by attempting to insert duplicate records manually.

The screenshot shows the 'Duplicate Rule Detail' page in Salesforce. The rule is named 'Student Duplicate Rule' and is currently inactive. The description is 'Prevents duplicate student records based on Email and Phone using fuzzy'. The object is 'Student'. The record-level security is 'Enforce sharing rules'. The action on create is 'Allow' and the action on edit is 'Allow'. The alert text is 'Use one of these records?'. The rule was created by 'HARIKA PILLIKANDLA' on '9/26/2025, 11:45 AM'. There are buttons for 'Edit', 'Delete', 'Clone', and 'Activate' at the top right and bottom right of the rule details.

Duplicate Rule Detail	
Rule Name	Student Duplicate Rule
Description	Prevents duplicate student records based on Email and Phone using fuzzy
Object	Student
Record-Level Security	Enforce sharing rules
Action On Create	Allow
Action On Edit	Allow
Alert Text	Use one of these records?
Active	<input type="checkbox"/>
Conditions	
Created By	HARIKA PILLIKANDLA, 9/26/2025, 11:45 AM

4. Data Export

- Scheduled weekly export of internship and application data.
- Enabled backup retention for audit and rollback purposes.

5. Change Sets

- Created outbound change sets for:
 - Validation Rules
 - Flows and Approval Processes
 - Apex Classes and Triggers
- Uploaded to target sandbox and deployed after testing.

6. Managed vs Unmanaged Packages

- Used Unmanaged Package for internal deployment and demo.

- Documented steps to convert to Managed Package for AppExchange readiness.

7. VS Code & SFDX

- Set up VS Code with Salesforce Extension Pack.
- Created scratch orgs for isolated testing.
- Used SFDX commands for metadata pull, push, and version control.

Impact

- Ensures clean, reliable data for demo and production.
- Prevents duplication and maintains data integrity.
- Supports scalable deployment and version control.
- Demonstrates professional-grade development practices.

Phase 9: Reporting, Dashboards & Security Review

Purpose

This phase focuses on visualizing key metrics and securing sensitive data. It empowers stakeholders with insights while ensuring compliance and controlled access.

Key Components

- Custom Reports
- Dashboards
- Field-Level Security
- Sharing Rules
- Audit Trail
- Login IP Ranges

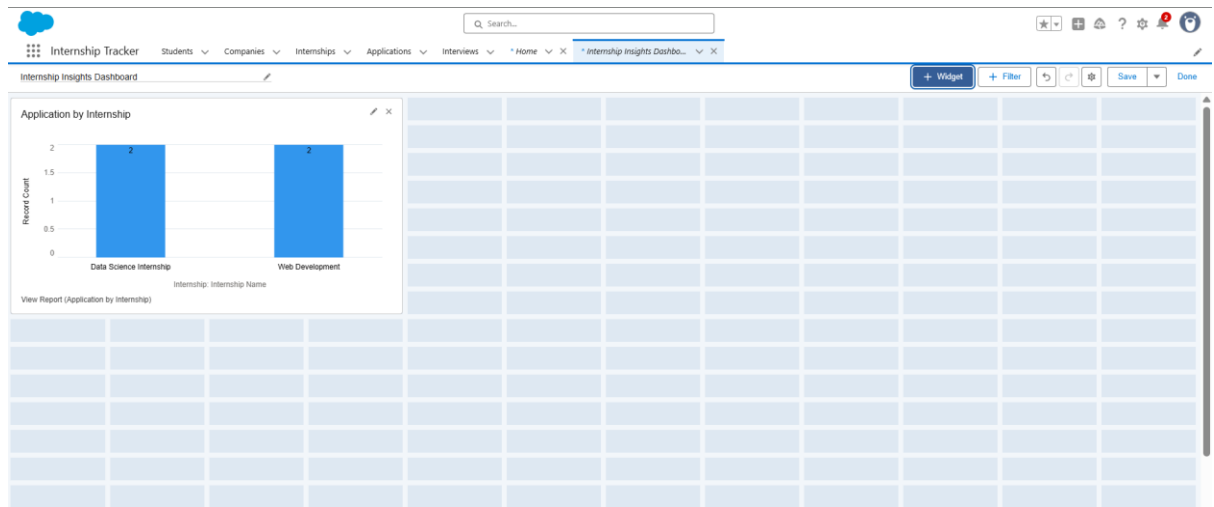
Implementation Steps

1. Reports

- Created reports for:
 - Applications by Internship
 - Recruiter Participation
 - Placement Success Rate
- Used filters, groupings, and summary formulas.
- Exported reports for documentation and review.

2. Dashboards

- Designed Internship Overview Dashboard:
 - Pie chart: Filled vs Open Internships
 - Bar chart: Applications per Internship
 - Table: Top-performing students
- Created Student Dashboard
- Application status breakdown
- Upcoming interviews
- Approval status



3. Field-Level Security

- Restricted visibility of sensitive fields like Stipend and Interview Feedback.
- Configured profiles for Students, Recruiters, and Officers.
- Verified access using “View Field Accessibility”.

Internship

[« Back to Custom Object: Internship](#)

This page allows you to view Internship field accessibility for a particular field.

Field accessibility for Field: **Company**

Click on a cell in the table below to change the field's accessibility.

	Record Types			
Profiles	Master	Closed Internship	Open Internship	Shortlisted Internship
Analytics Cloud Integration User	Editable	Editable	Editable	Editable
Analytics Cloud Security User	Editable	Editable	Editable	Editable
Anypoint Integration	Editable	Editable	Editable	Editable
Contract Manager	Editable	Editable	Editable	Editable
Cross Org Data Proxy User	Editable	Editable	Editable	Editable
Custom: Marketing Profile	Editable	Editable	Editable	Editable
Custom: Sales Profile	Editable	Editable	Editable	Editable
Custom: Support Profile	Editable	Editable	Editable	Editable
Einstein Agent User	Editable	Editable	Editable	Editable
Force.com - App Subscription User	Editable	Editable	Editable	Editable
Force.com - Free User	Editable	Editable	Editable	Editable
Gold Partner User	Hidden	Hidden	Hidden	Hidden
Identity User	Editable	Editable	Editable	Editable
Marketing User	Editable	Editable	Editable	Editable
Minimum Access - API Only Integrations	Editable	Editable	Editable	Editable
Minimum Access - Salesforce	Editable	Editable	Editable	Editable
Partner App Subscription User	Editable	Editable	Editable	Editable
Partner Community Login User	Hidden	Hidden	Hidden	Hidden
Partner Community User	Hidden	Hidden	Hidden	Hidden
Read Only	Editable	Editable	Editable	Editable
Recruiter	Editable	Editable	Editable	Editable
Salesforce API Only System Integrations	Editable	Editable	Editable	Editable
Silver Partner User	Hidden	Hidden	Hidden	Hidden
Solution Manager	Editable	Editable	Editable	Editable
Standard Platform User	Editable	Editable	Editable	Editable
Standard User	Editable	Editable	Editable	Editable
Student Profile	Editable	Editable	Editable	Editable
System Administrator	Editable	Editable	Editable	Editable
Work.com Only User	Editable	Editable	Editable	Editable
Profiles	Master	Closed Internship	Open Internship	Shortlisted Internship
	Record Types			

4. Sharing Rules

- Internship__c: Shared with Recruiters based on criteria (e.g., Location).
- Application__c: Shared with Internship Officers only.
- Used role hierarchy and manual sharing for exceptions.

5. Audit Trail

- Enabled field history tracking for key objects.
- Reviewed Setup Audit Trail for configuration changes.

6. Login IP Ranges

- Restricted recruiter access to trusted IP ranges.

- Configured in profile settings to prevent unauthorized access.

Impact

- Provides actionable insights for decision-making.
- Enhances transparency and performance tracking.
- Protects sensitive data and enforces access control.
- Demonstrates enterprise-level security and governance.

Phase 10: Final Presentation & Demo Day

Purpose

This phase wraps up the project with a professional showcase. It highlights the problem-solving journey, demonstrates the working solution, and prepares handoff materials for future use or portfolio display.

Key Components

- Pitch Presentation
- Live Demo Walkthrough
- Feedback Collection
- Handoff Documentation
- Portfolio Showcase

Implementation Steps

1. Pitch Presentation

- Slide 1: Problem Statement – Manual internship tracking is inefficient.
- Slide 2: Solution Overview – Automated, scalable Salesforce app.
- Slide 3: Impact – Reduced admin effort, improved placement visibility.

2. Live Demo Walkthrough

- Student applies → Validation triggers → Interview auto-created.
- Recruiter selects student → Dashboard updates → Approval process triggered.
- Show dashboards, flows, and LWC components in action.

3. Feedback Collection

- Created Google Form or Salesforce Survey.
- Included rating scale, comments, and suggestions.
- Shared with mentors and stakeholders post-demo.

4. Handoff Documentation

- Included:
- ERD diagram showing object relationships.
- Flow diagrams for automation logic.

- Setup guide for deployment and testing.
- Apex trigger and test class documentation.

5. Portfolio Showcase

- Published demo video on LinkedIn.
- Added screenshots and highlights to personal website or resume.
- Included GitHub repo or unmanaged package link (optional).

Impact

- Demonstrates end-to-end solution with real-world relevance.
- Builds confidence and credibility with stakeholders.
- Provides reusable assets for future projects or job interviews.
- Celebrates your achievement and technical growth.