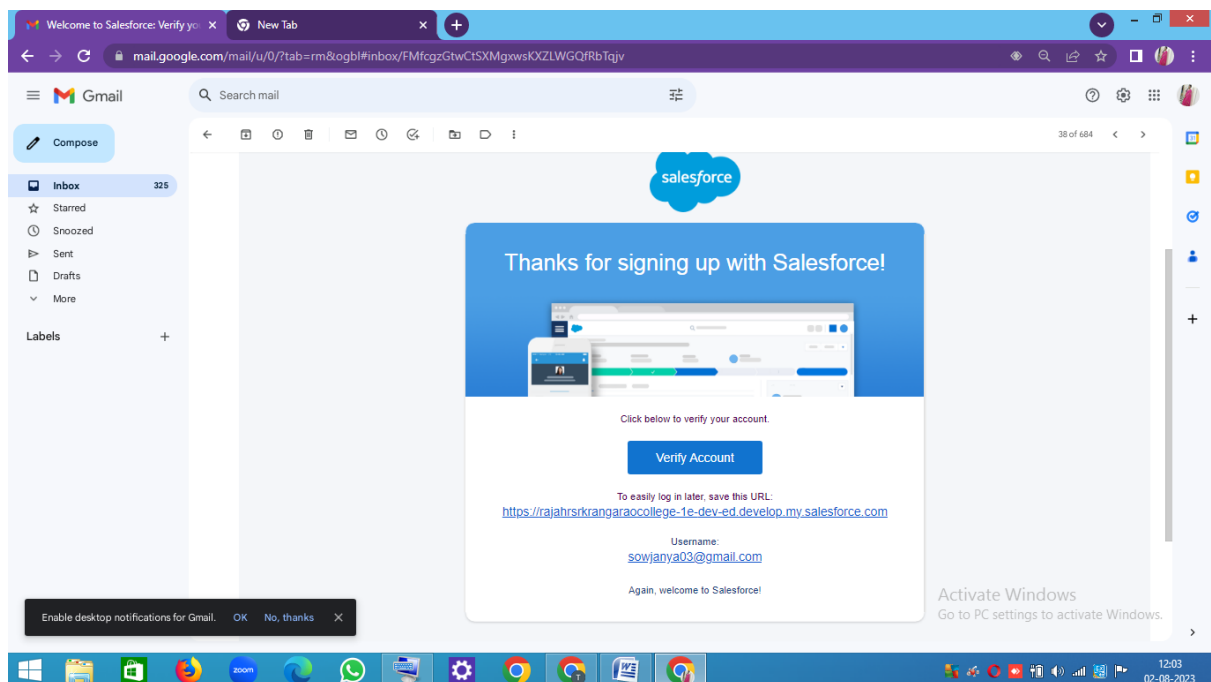


Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/signup
2. Click on sign up.
3. On the sign-up form, enter the following details:
 1. First name & Last name
 2. Email
 3. Role: Developer
 4. Company: College Name
 5. Country: India
 6. Postal Code: pin code
 7. Username: should be a combination of your name and company
This need not be an actual email id, you can give anything in the format: [username@organization.com](#)
4. Click on signup after filling these.

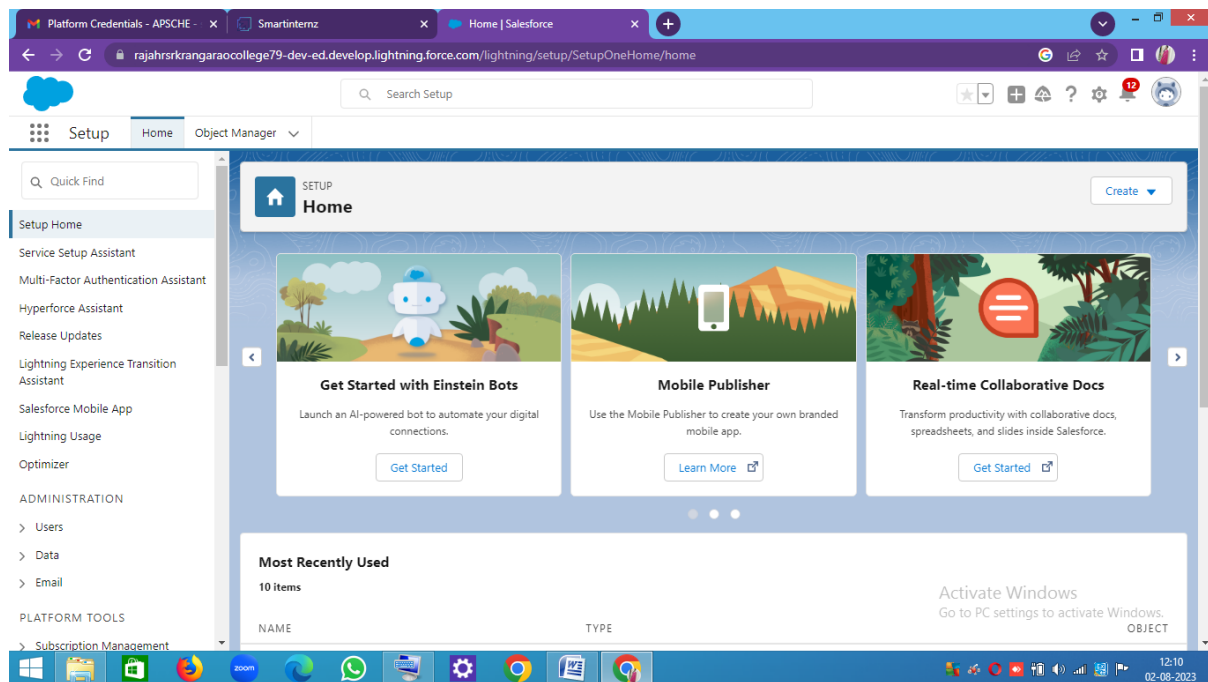


Account Activation

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

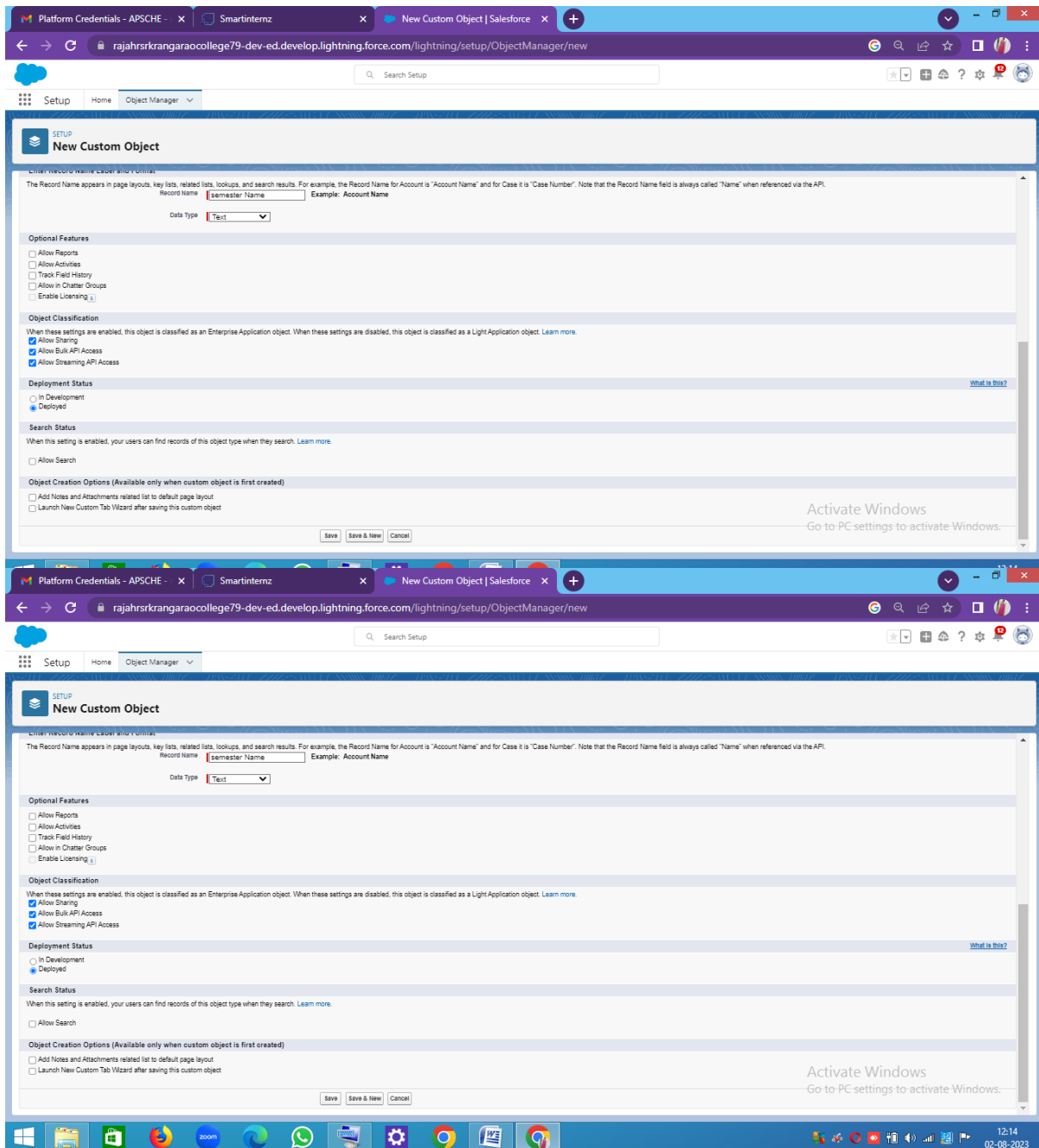
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Creation Of Semester Object For Candidate Internal Result Card

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 Dropdown 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.

In the same way create **4** more objects as **Candidate**, **Course Details**, **Lecturer Details** and **Internal results**.



Creation Of Semester Tab For 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 .

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, Internalresults, Reports, and Dashboards** and move them to Selected Items.
7. Click Next.

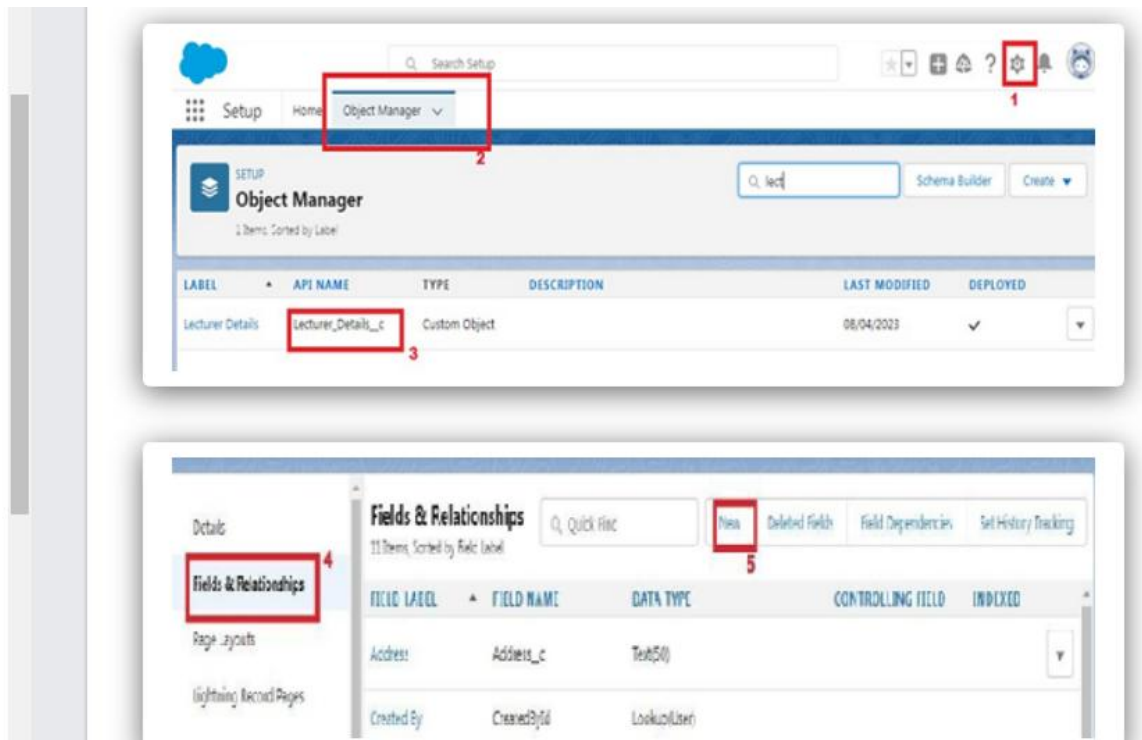
From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

The screenshot displays the Salesforce Lightning Experience App Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a search bar and a list of navigation items under 'Salesforce Mobile App' and 'Salesforce'. The main content area shows a list of 22 items, sorted by App Name, with columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visible i... The list includes various apps like All Tabs, Analytics Studio, App Launcher, Bot Solutions, Candidate Internal Result Card, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, Sales, LightningSales, Sales Console, Salesforce Chatter, Salesforce Scheduler Setup, Service, Service Console, Site.com, and Subscription Management.

Below the list, the 'Custom Tabs' configuration page is shown. It includes a 'Custom Object Tabs' section with a table of tabs, a 'Web Tabs' section, and sections for 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. The 'Custom Object Tabs' table has columns for Action, Label, Tab Role, and Description. The table lists several tabs: 'Lecturer Details', 'Candidate Details', 'Internal Results', 'Network Details', and 'Attachments'. The 'Web Tabs' section is empty. The 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs' sections are also empty.

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.



Step 2. Enter the details Step 2 of 4

Field Label: Previous **Next** Cancel

Length:

Field Name:

Description:

Help Text:

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.



Details

Fields & Relationships 4

Page Layouts

Lightning Record Pages

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

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)		

Each new record

☐ Formula

☐ Roll-Up Summary 1

☒ Lookup Relationship 6

☐ Master-Detail Relationship

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.

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.

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

Previous Next Cancel

Select the other object to which this object is related.

Related To Semester 7

Previous Next Cancel

Field Label Semester Name 8

Field Name Semester_Name

Description

Help Text

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.

Details

Fields & Relationships 4

Page Layouts

Lightning Record Pages

Fields & Relationships 5

11 Items, Sorted by Field Label

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

Field Label Duration 6

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length 1 Decimal Places 2

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name Duration

Description

Help Text Enter Course duration value in Years 7

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.

Setup

Home

Object Manager 2

Search Setup

Schema Builder Create

Object Manager

3 Items, Sorted by Label

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

Fields & Relationships 4

Page Layouts

Lightning Record Pages

Fields & Relationships 5

11 Items, Sorted by Field Label

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

Field Label Candidate Roll Number

Data Type

☐ None Selected Select one of the data types below.

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

☒ **Formula** 6 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: `{TODAY()} > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{GrossMargin * Amount - Cost}_c`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `{ReminderDate + 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}_s + 32`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `{Discount * (Amount - DiscountedAmount_s) / Amount}`

☒ **Text** 8 Create a text string, for example, by concatenating other text fields.
Example: `{Field Name 1} & " " & {Field Name 2}`

Example: `{Full Name * LastName & ", " * & FirstName}` [More Examples...](#) 9

Simple Formula **Advanced Formula**

Insert Field 9 **Insert Operator**

Candidate Roll Number (Text) =

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Insert Field 10

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

Internal results >	Candidate >	Address
\$Api >	Candidate >	Candidate Name
\$Organization >	Created By >	Candidate Roll Number
\$Profile >	Created By ID	City
\$System >	Created Date	Created By >
\$User >	Internal results Name	Created By ID
\$UserRole >	Last Modified By >	Created Date
	Last Modified By ID	Education
	Last Modified Date	Email

You have selected:
Candidate__r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c

Insert

Close

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.

Search Setup

Setup Home Object Manager

Object Manager

Schema Builder Create

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

Details

Fields & Relationships

Quick Find New 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)		

Candidate
New Custom Field

Step 2. Enter the details

Previous Next Cancel

Field Label Candidate Roll Number

Display Format CAD-(000) Example: A-(0000) What is This?

Starting Number 0

Generate auto number for existing records

Field Name Candidate_Roll_Number

Description

Help Text

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.
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. In the left sidebar, the 'Users' link is highlighted. The main content area displays the 'All Users' page with a table of existing users. Below the table, the 'User Edit' form is visible, showing fields for user creation. Red boxes and numbers 1 through 6 highlight specific steps in the process.

1 Quick Find box containing 'user'.

2 'Users' link in the left sidebar.

3 'New User' button above the user table.

4 'General Information' section of the 'User Edit' form, containing fields for First Name, Last Name, Alias, Email, Username, and Nickname.

5 'Role' dropdown menu set to '<None Specified>'.

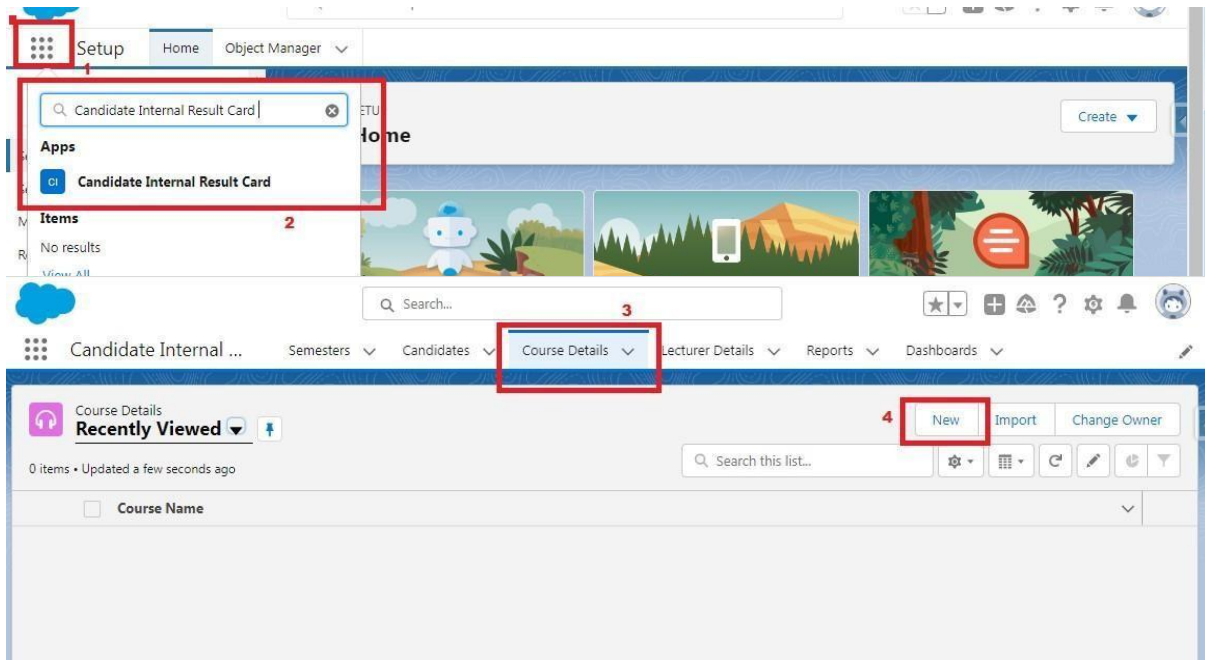
6 'User License' dropdown menu set to 'Salesforce' and 'Profile' dropdown menu set to 'Standard User'.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	1. User	u1	utkarsh2@vanshiv.com	Operator 1	✓	operator
Edit	2. User	u2	utkarsh3@vanshiv.com	Operator 2	✓	operator
Edit	Chatter Expert	Chatter	chattv00d2w00000rs8akeaj.muirokiyxf1@chatter.salesforce.com		✓	Chatter Free User
Edit	Technologies Vanshiv	VTech	vehicledemo@vanshiv.com		✓	System Administrator
Edit	Teddy John	ted	utkarsh1@vanshiv.com	Vehicle Manager	✓	Vehicle Manager

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.



New Course Details

Information

* Course Name ↩

MBA

Duration i ↩

2

Owner 5

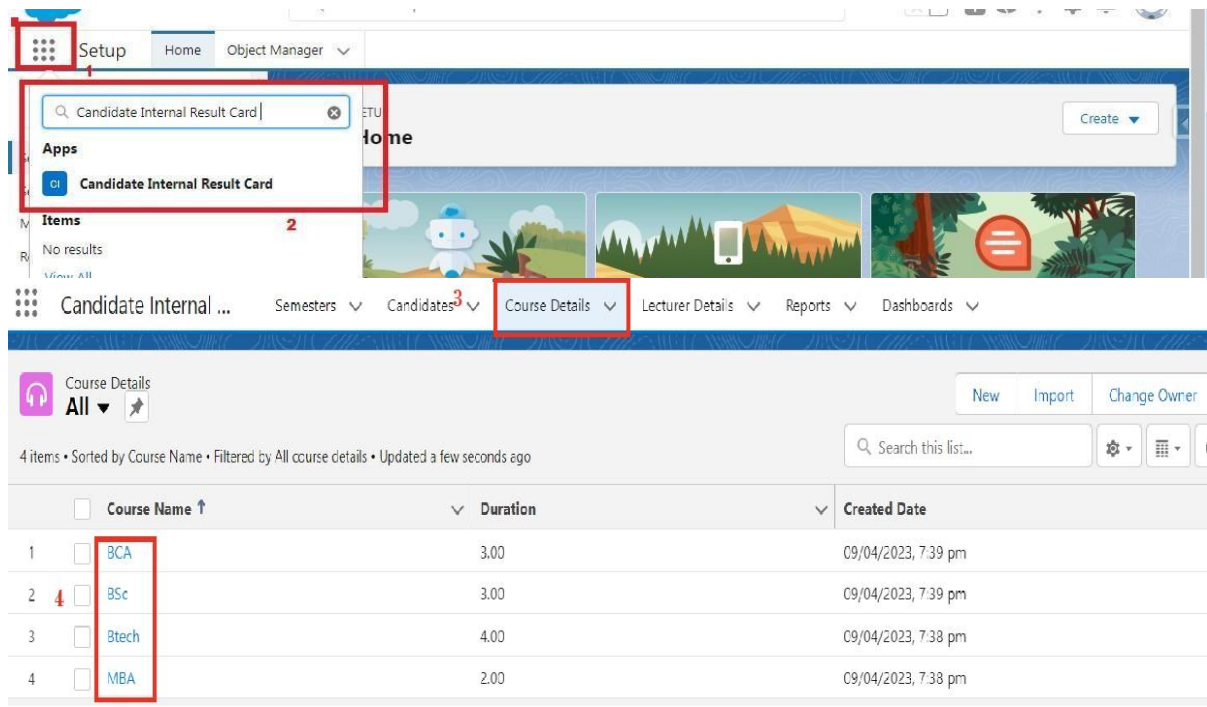
Vanshiv Technologies

Cancel Save & New Save 6

View Record (Course Details)

Viewing the Records of Course Detail Object

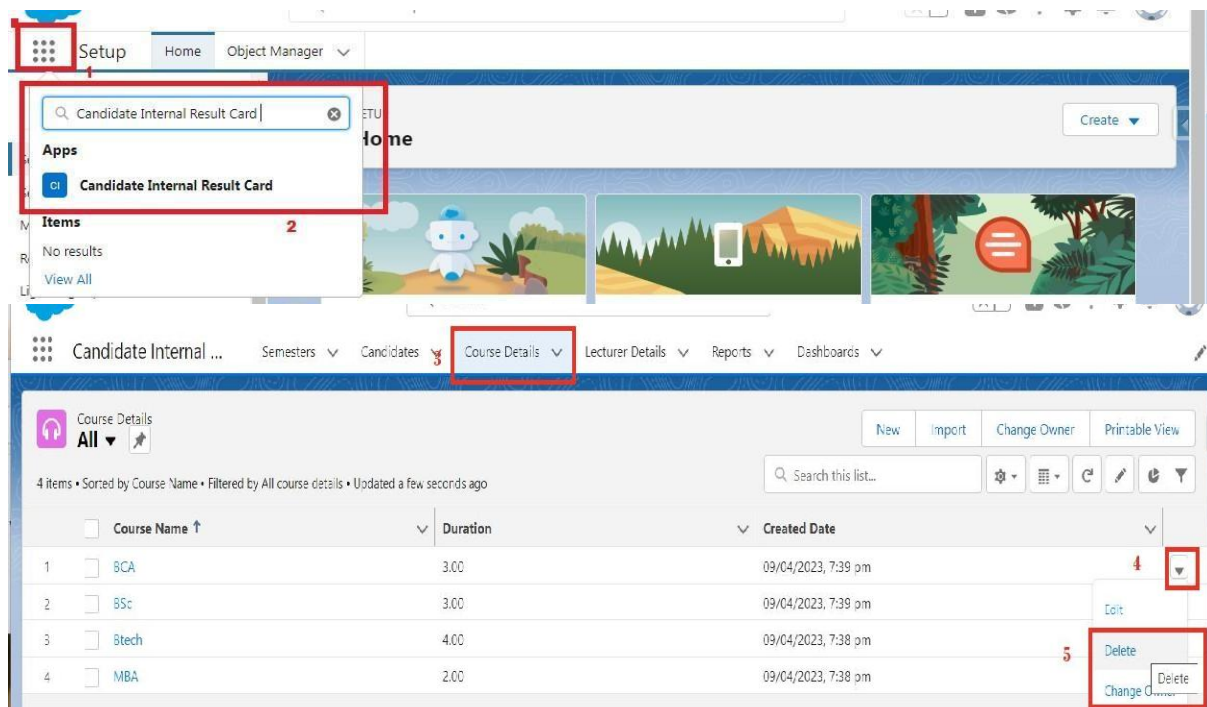
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on any record name. you can see the details of the Driver



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.



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

NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in "Select a report type option").

The screenshot shows the report builder interface with the following numbered annotations:

- 1:** Points to the 'Setup' button in the top navigation bar.
- 2:** Points to the 'Candidate Internal Result Card' app in the 'Apps' section.
- 3:** Points to the 'Reports' dropdown menu in the top navigation bar.
- 4:** Points to the 'New Report' button in the 'Recent' reports section.
- 5:** Points to the 'Save & Run' button in the report builder toolbar.
- 6:** Points to the 'Fields' pane on the left-hand side.
- 7:** Points to the 'Refresh' button in the report preview section.
- 8:** Points to the 'Update Preview Automatically' toggle switch.

The report preview section displays a table with the following data:

Course: Course Name	Semester: Semester Name
BCA (1)	1st
Subtotal	
BSc (3)	2nd
	6th
	3rd
Subtotal	
Btech (2)	4th
	5th

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.

Edit Bucket Column

*Field: Course: Duration X

*Bucket Name: Duration

Range	Bucket
<= 1	Small Course X
> 1 to 2	Medium Course X
> 2	Large Course X

☒ Treat empty Course: Duration values in the report as zeros.

Cancel Apply

Save Report

* Report Name 9

Candidate Internal Result Report

Report Unique Name ⓘ

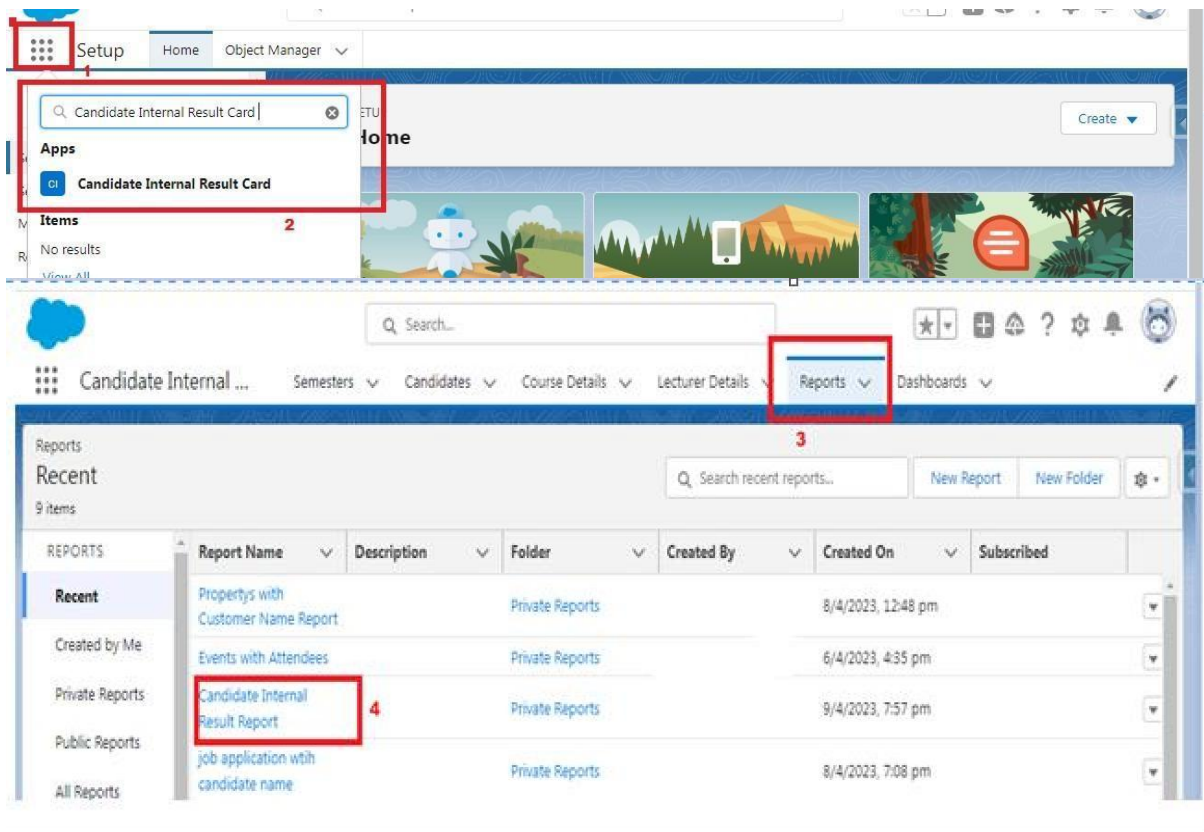
Candidate_Internal_Result_Report_bkY

Report Description

Cancel Save 10

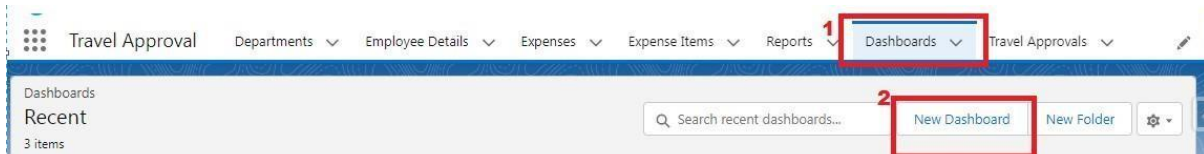
View Report

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.



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.



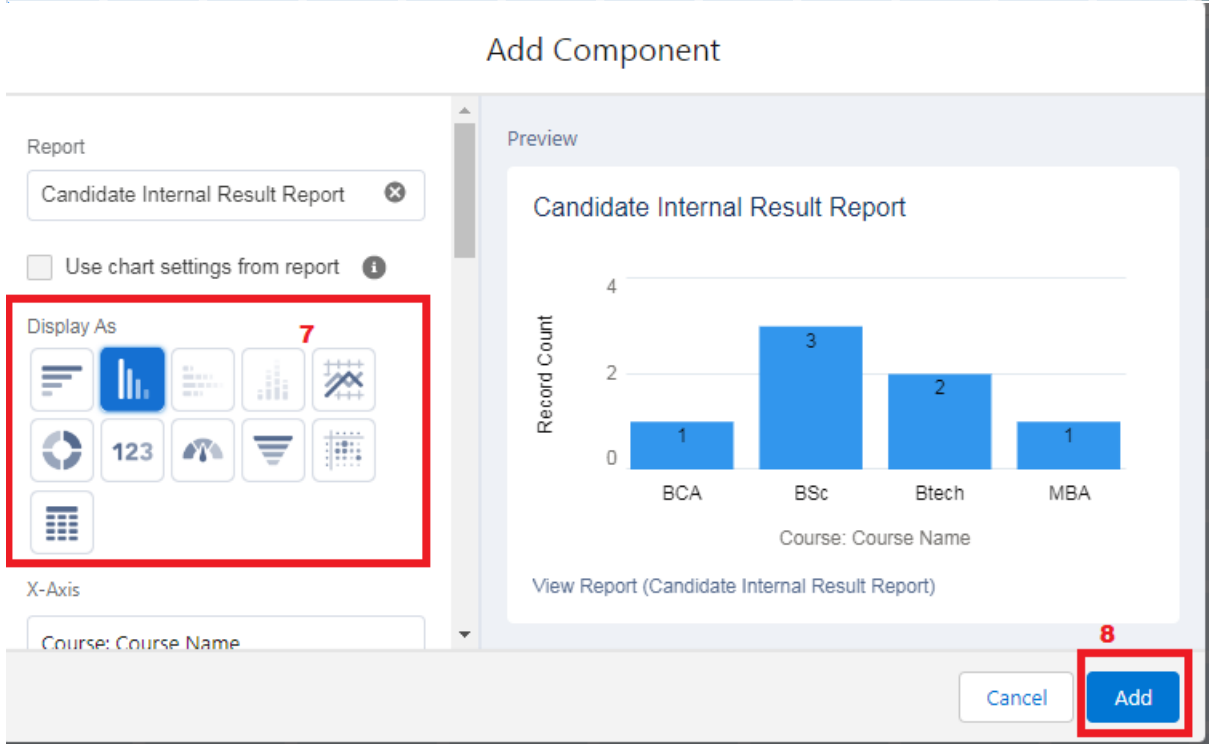
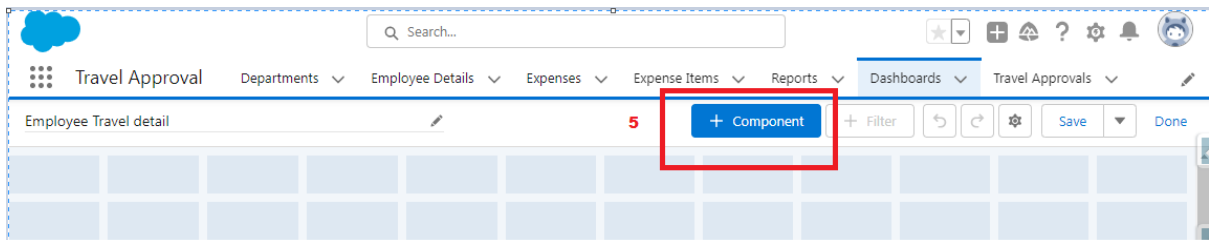
New Dashboard

*** Name**

Description

3

Folder



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

