

Project Report on

Implementing CRM for Result Tracking Of A Candidate With Internal Marks

(DEVELOPER) - (Short-Term)

Milestone – 01: Create Salesforce Org

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

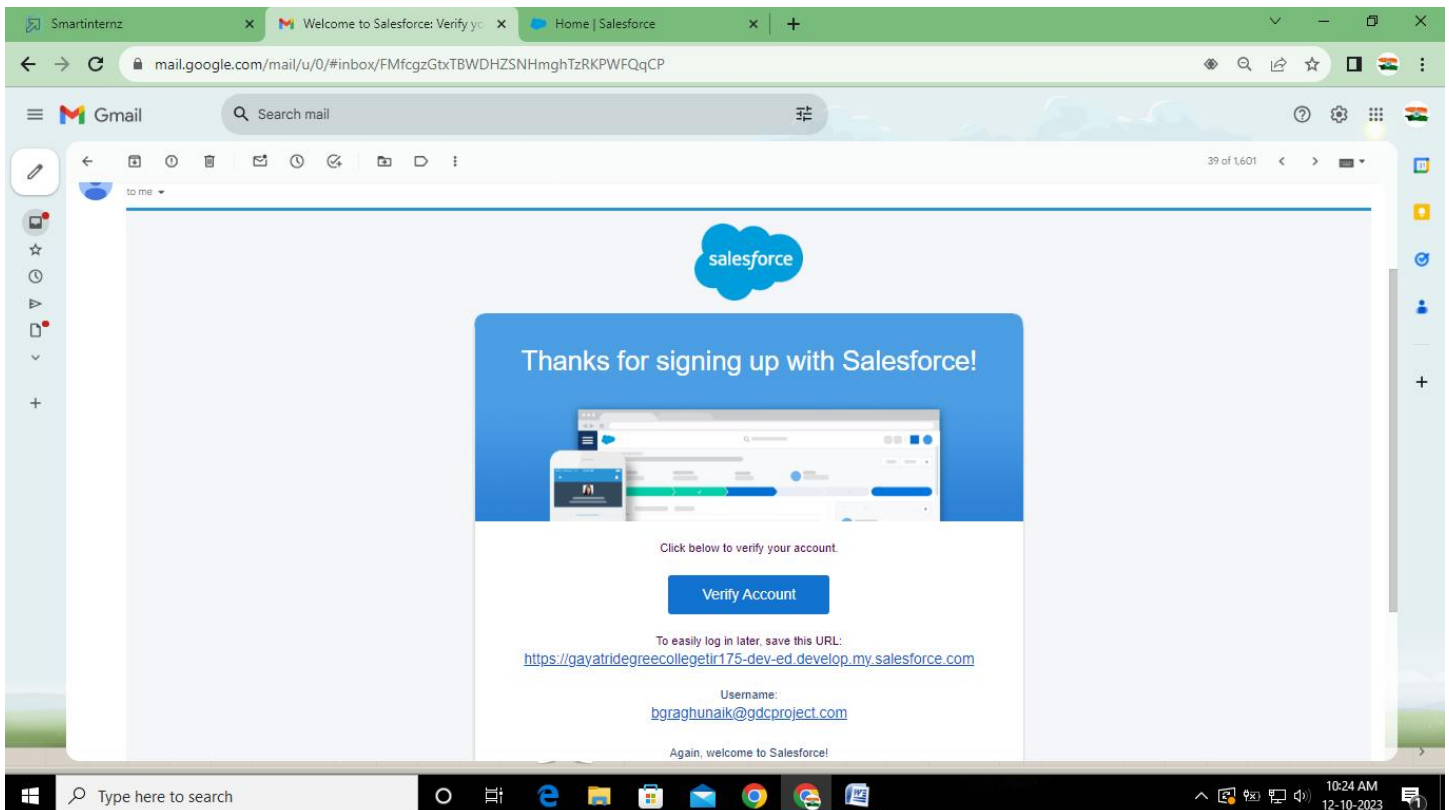
Click on sign up.

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

1. First name & Last name – B G RAGHU NAIK
2. Email – bgraghunaik@gmail.com
3. Role: **Developer**
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: bgraghunaik@gdcproject.com

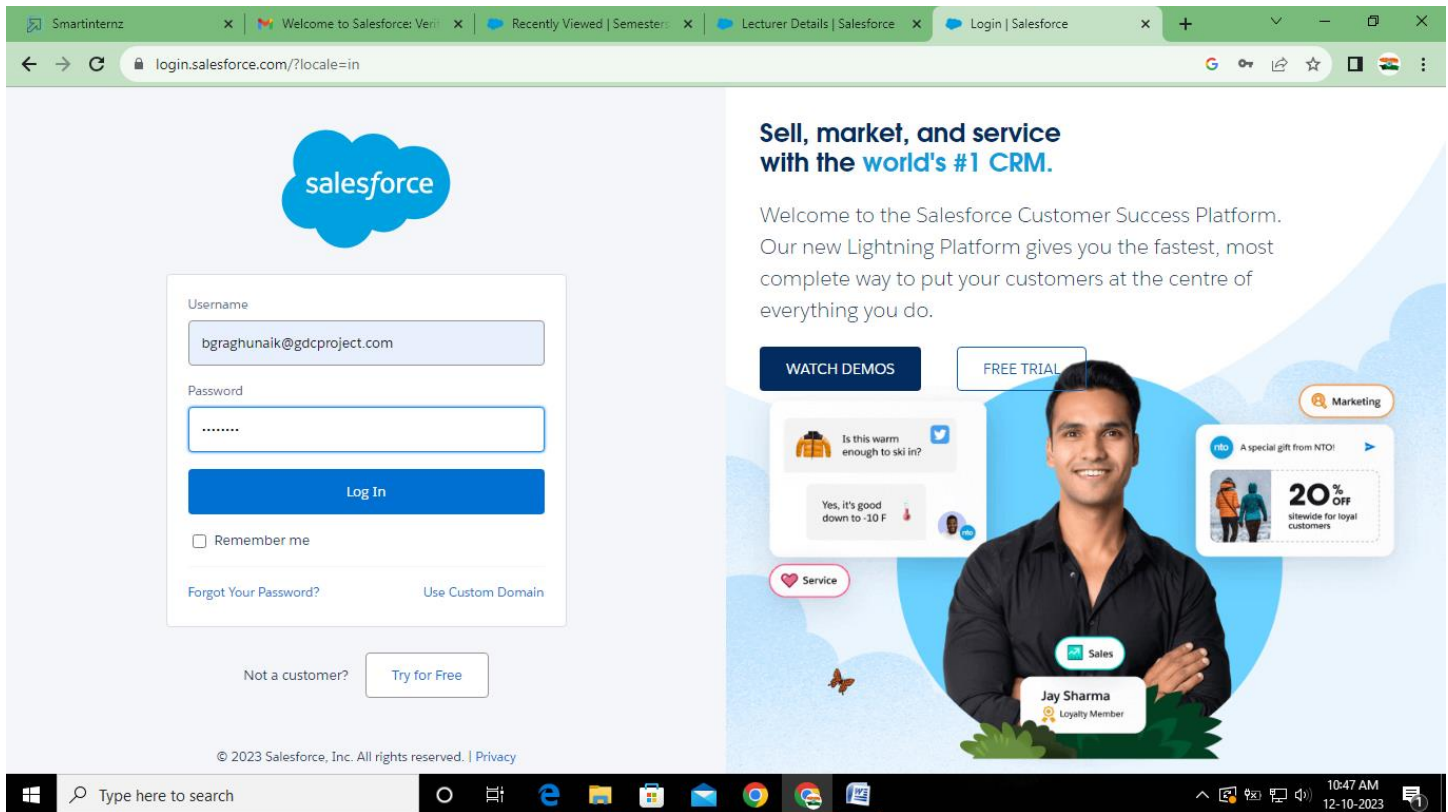
Account Activation

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

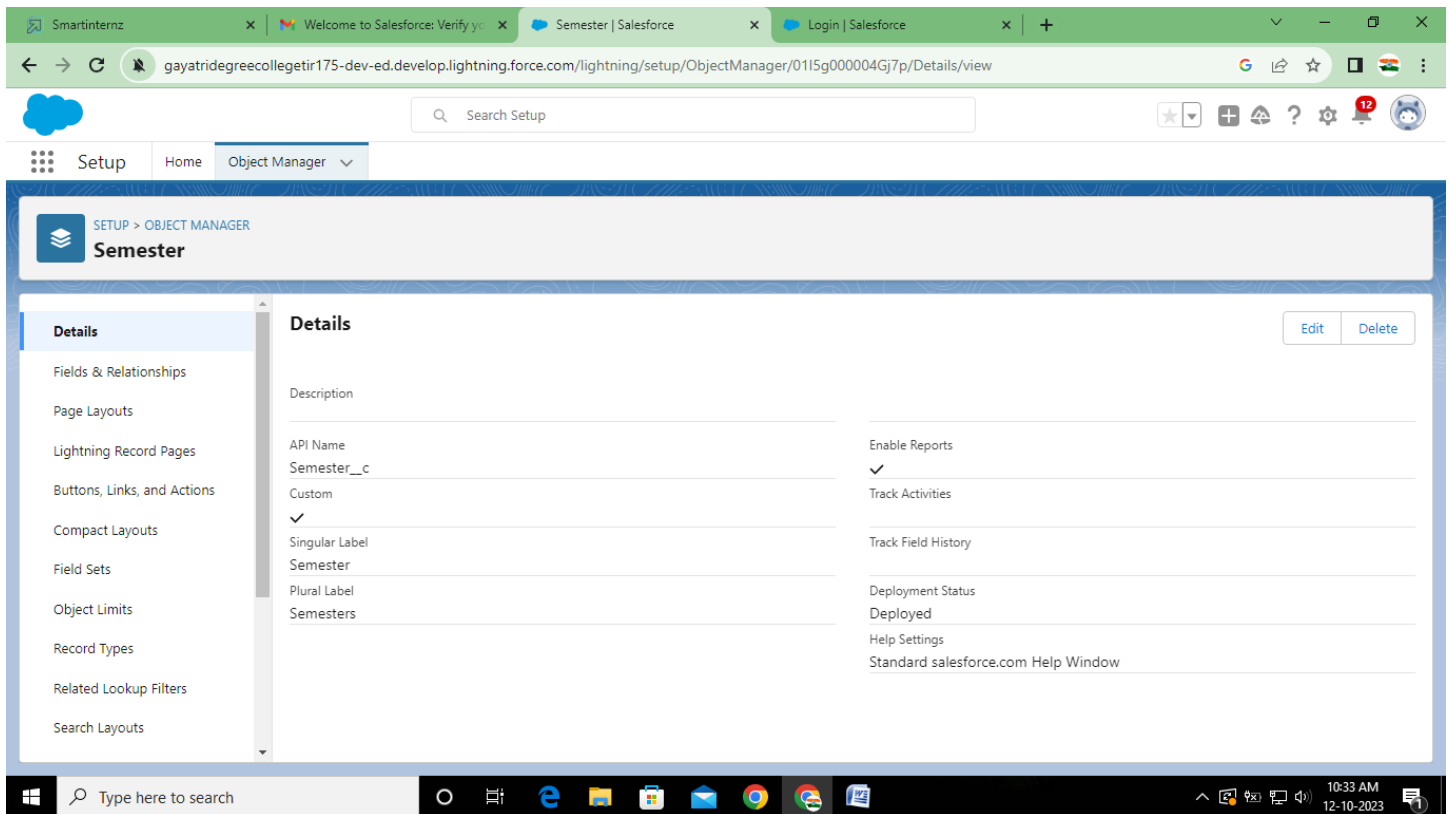
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Milestone – 02: Creation of Objects

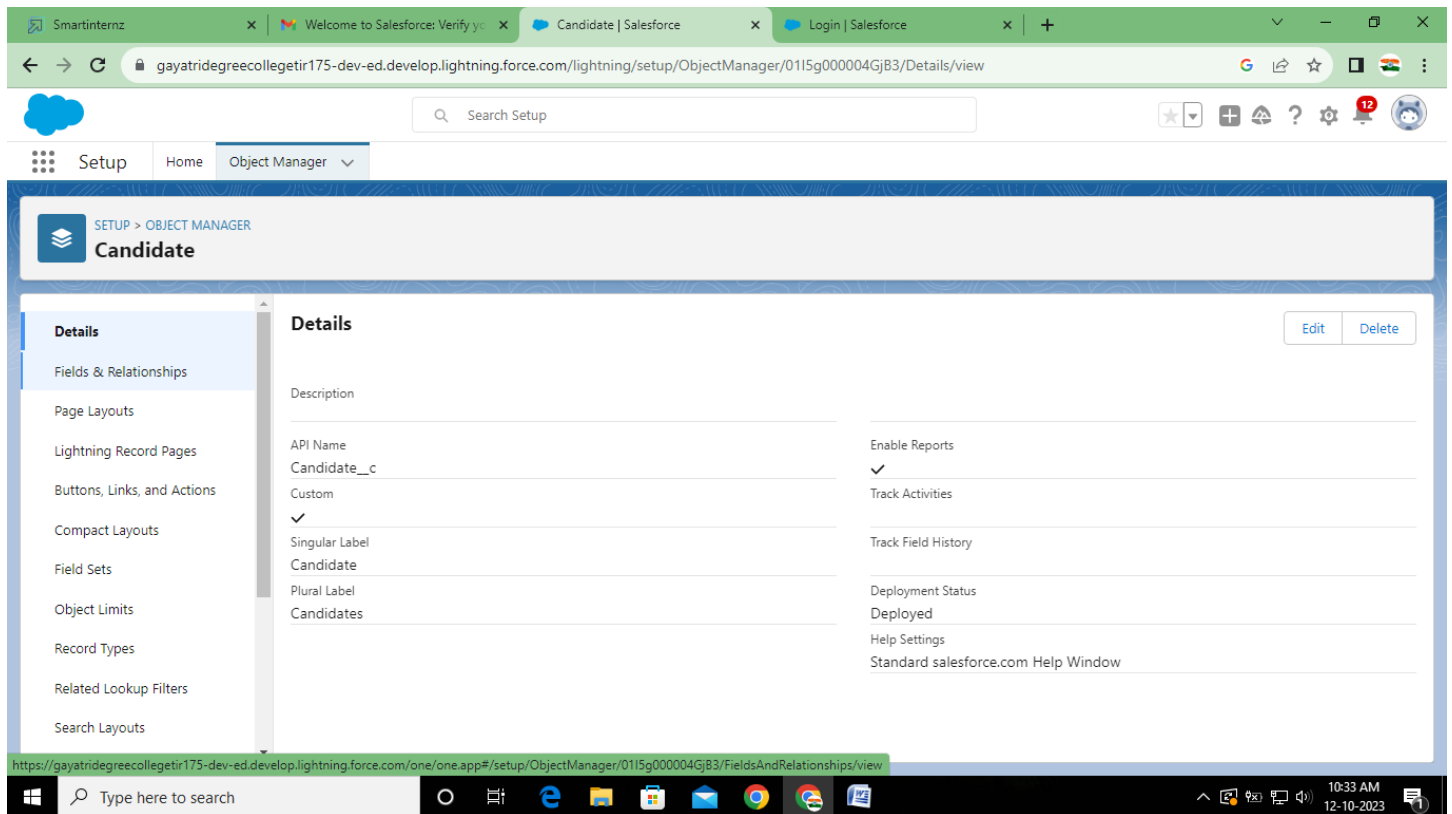
Object – Semester:

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 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.



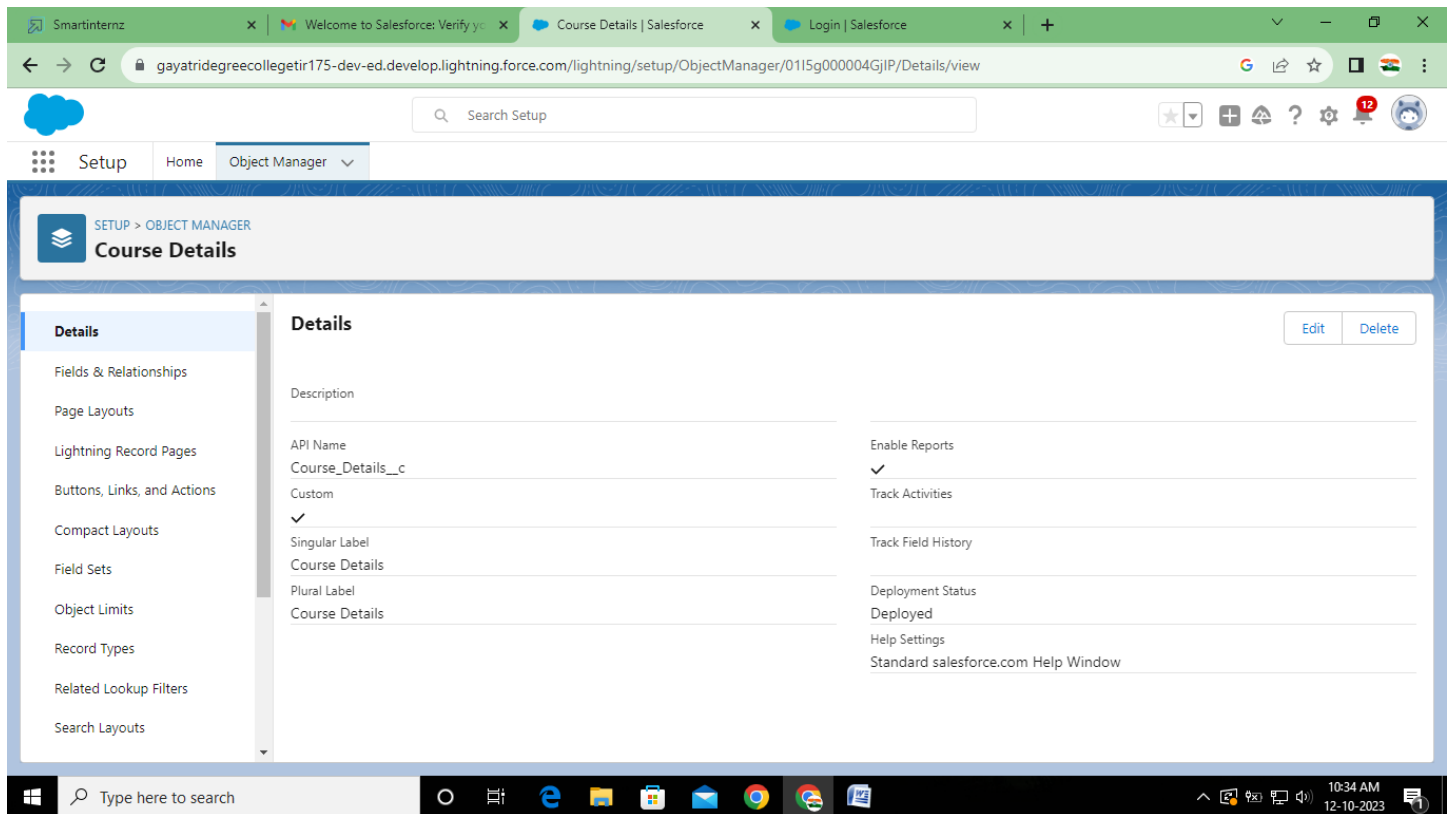
Object- Candidate

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 Dropdown 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.



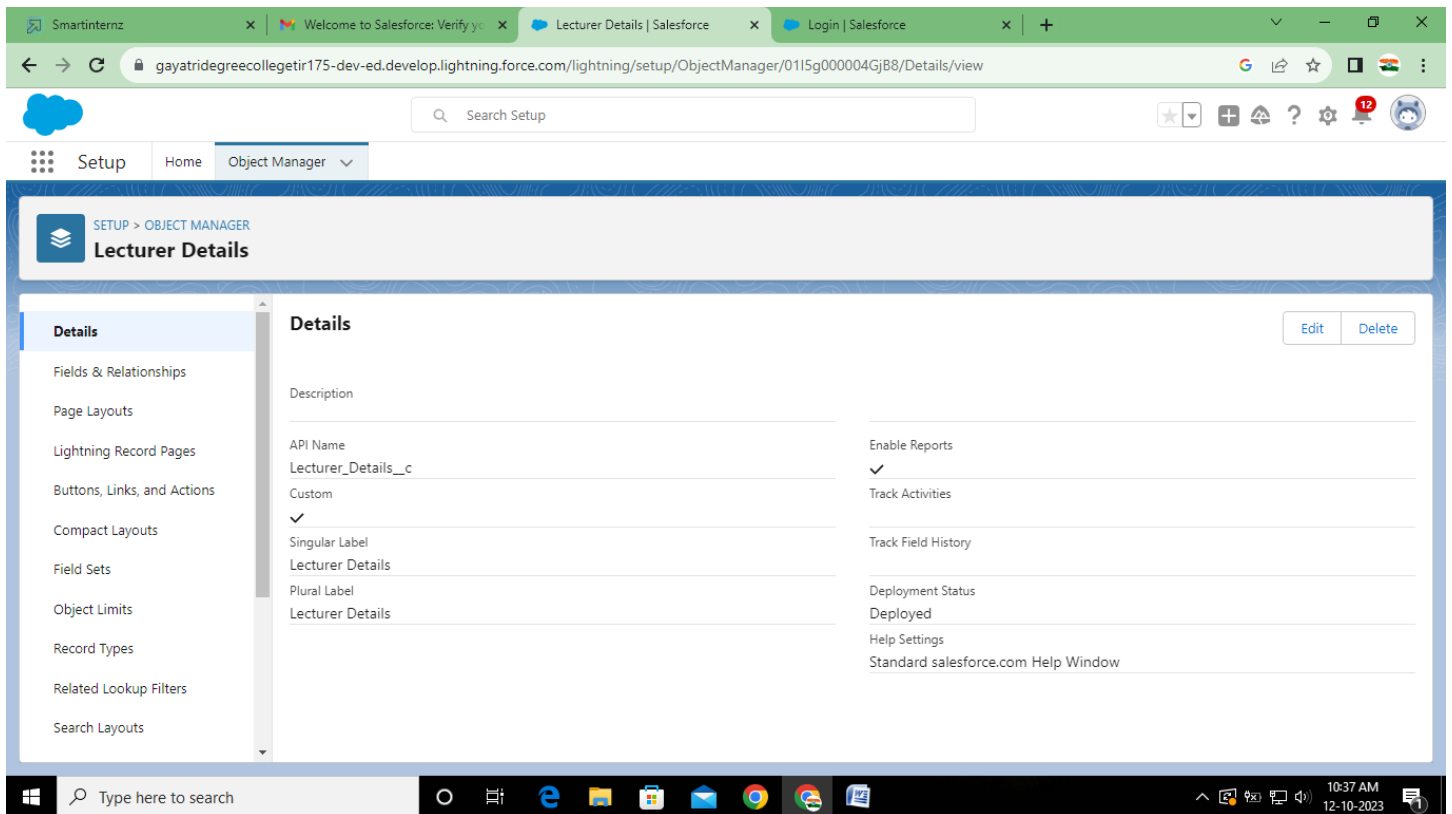
Object - Course Details

1. Click on the 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: **Course Details**
6. Plural Label: **Course Details**
7. Record Name: **Course Details**
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save.



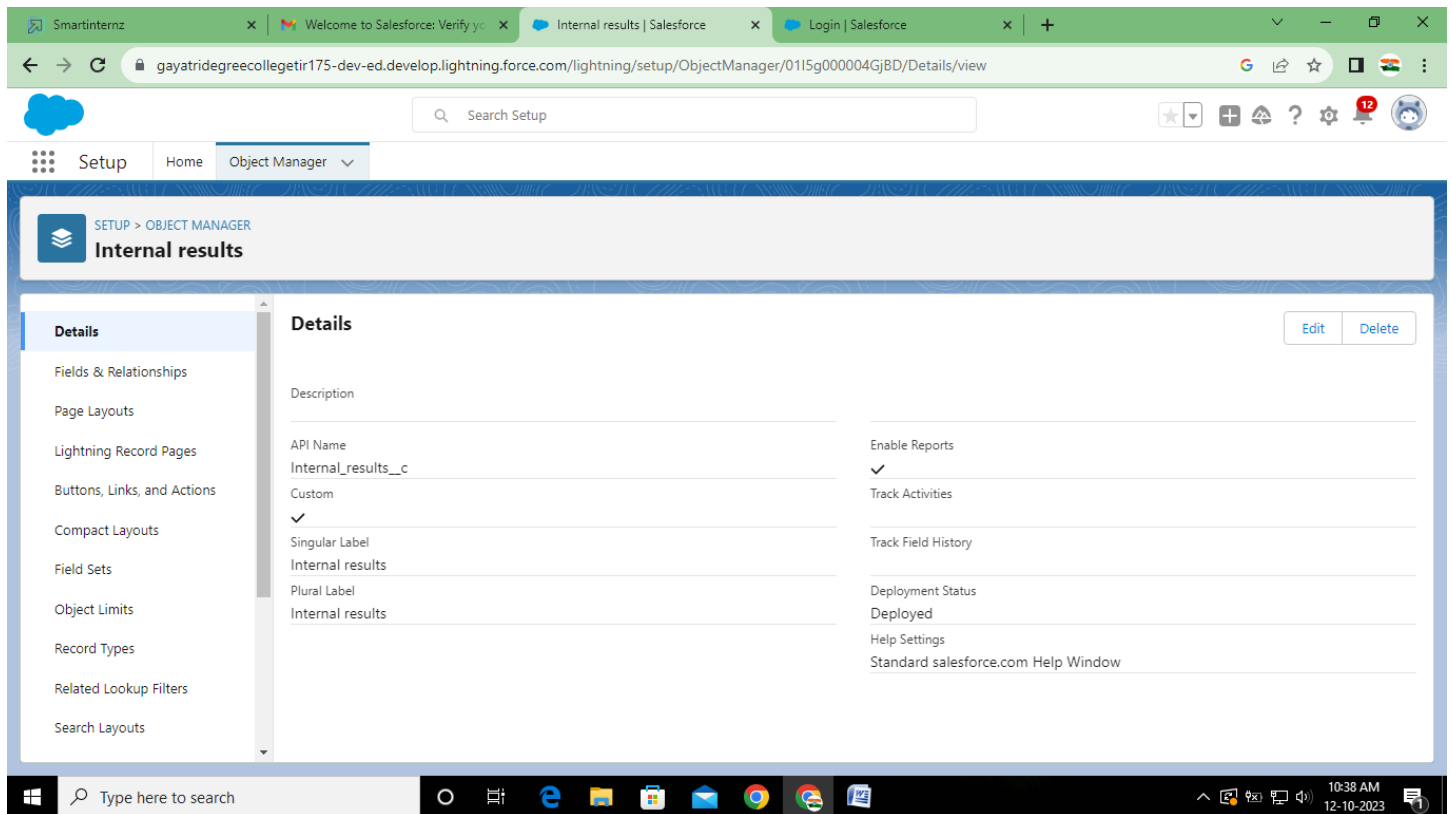
Object - Lecturer Details

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 Dropdown 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**
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save.



Object - Internal results

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: **Internal results**
6. Plural Label: **Internal results**
7. Record Name: **Internal results**
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save.

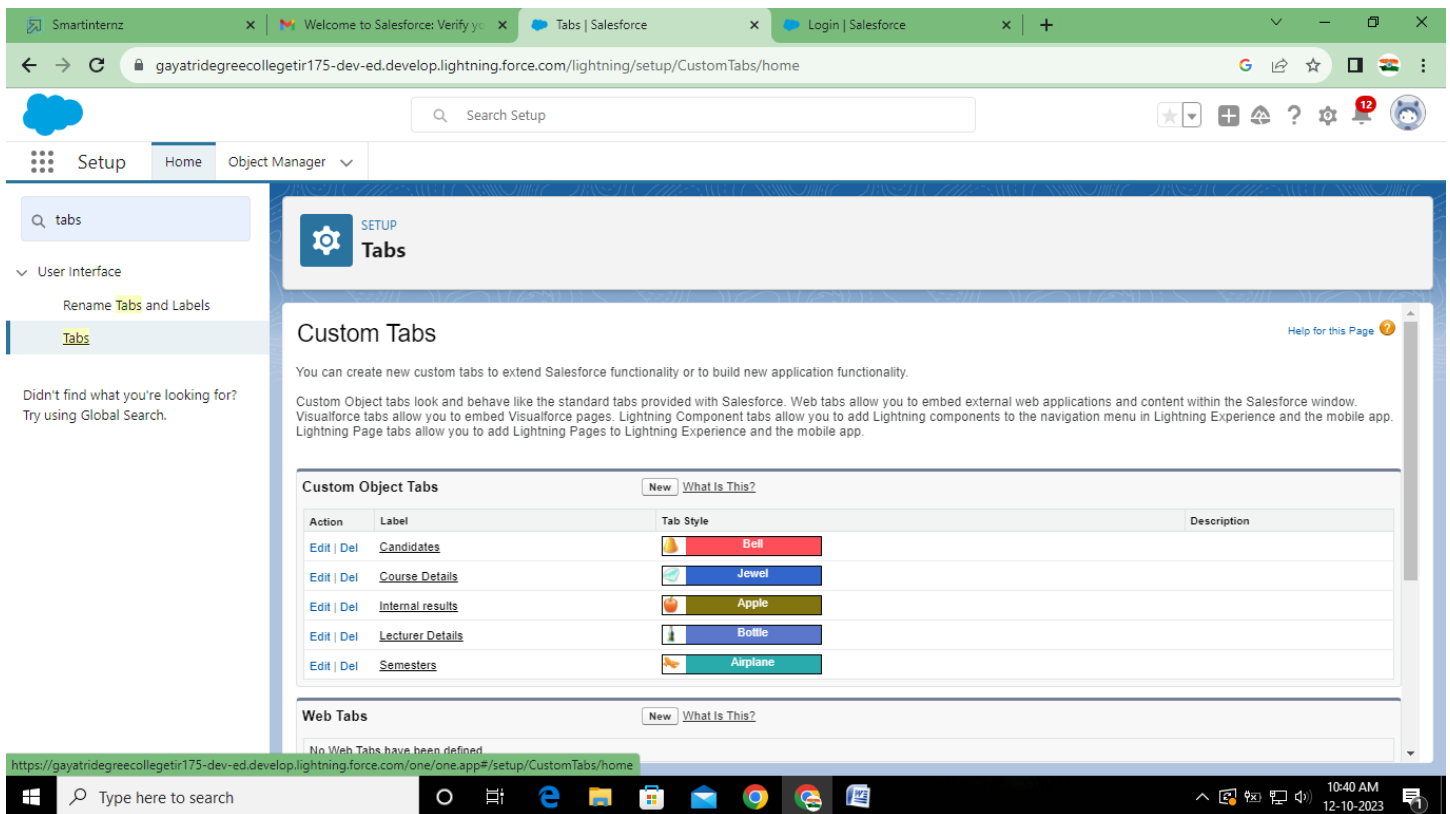


Milestone – 03: what Is A Tab?

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 .

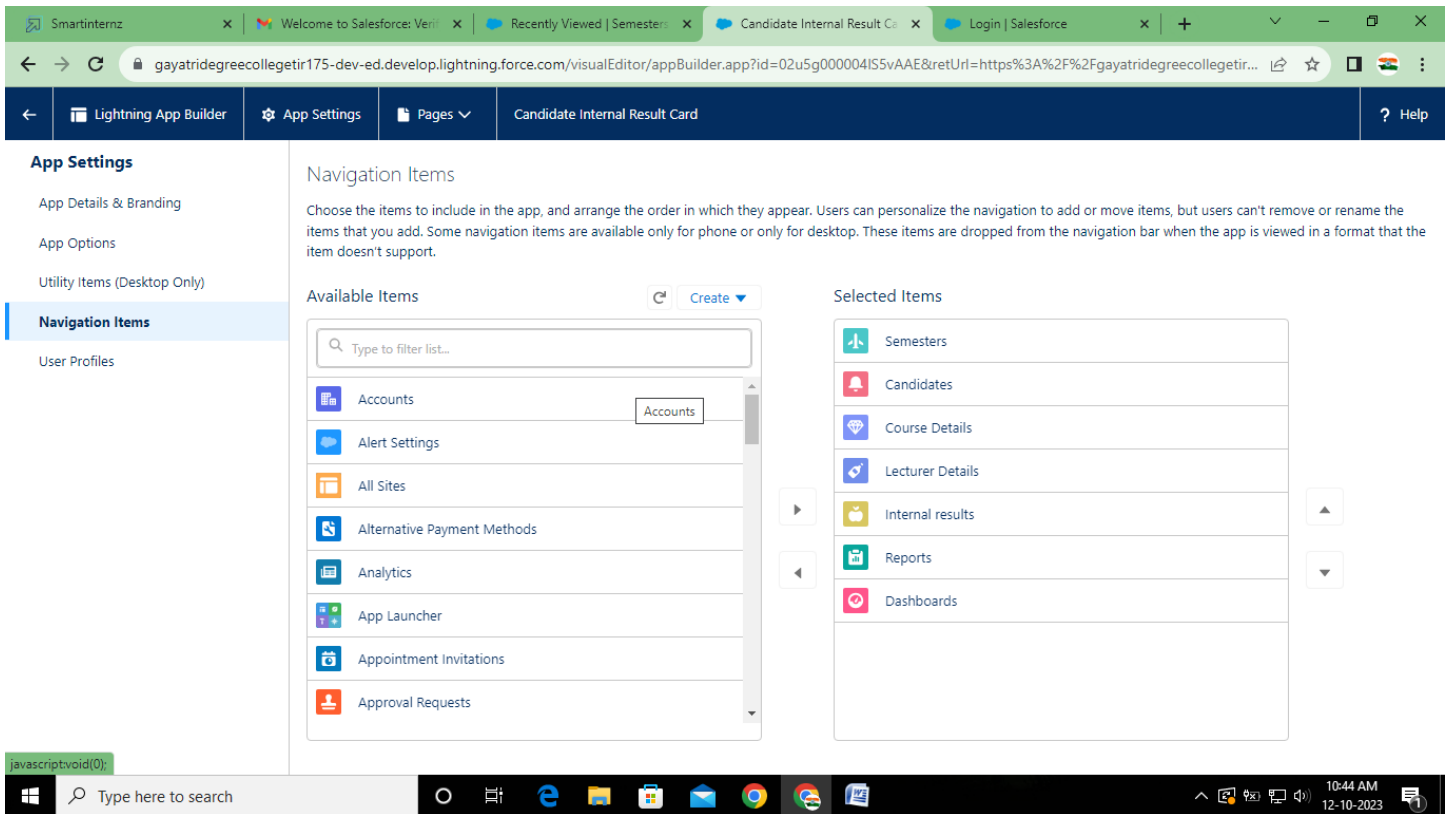
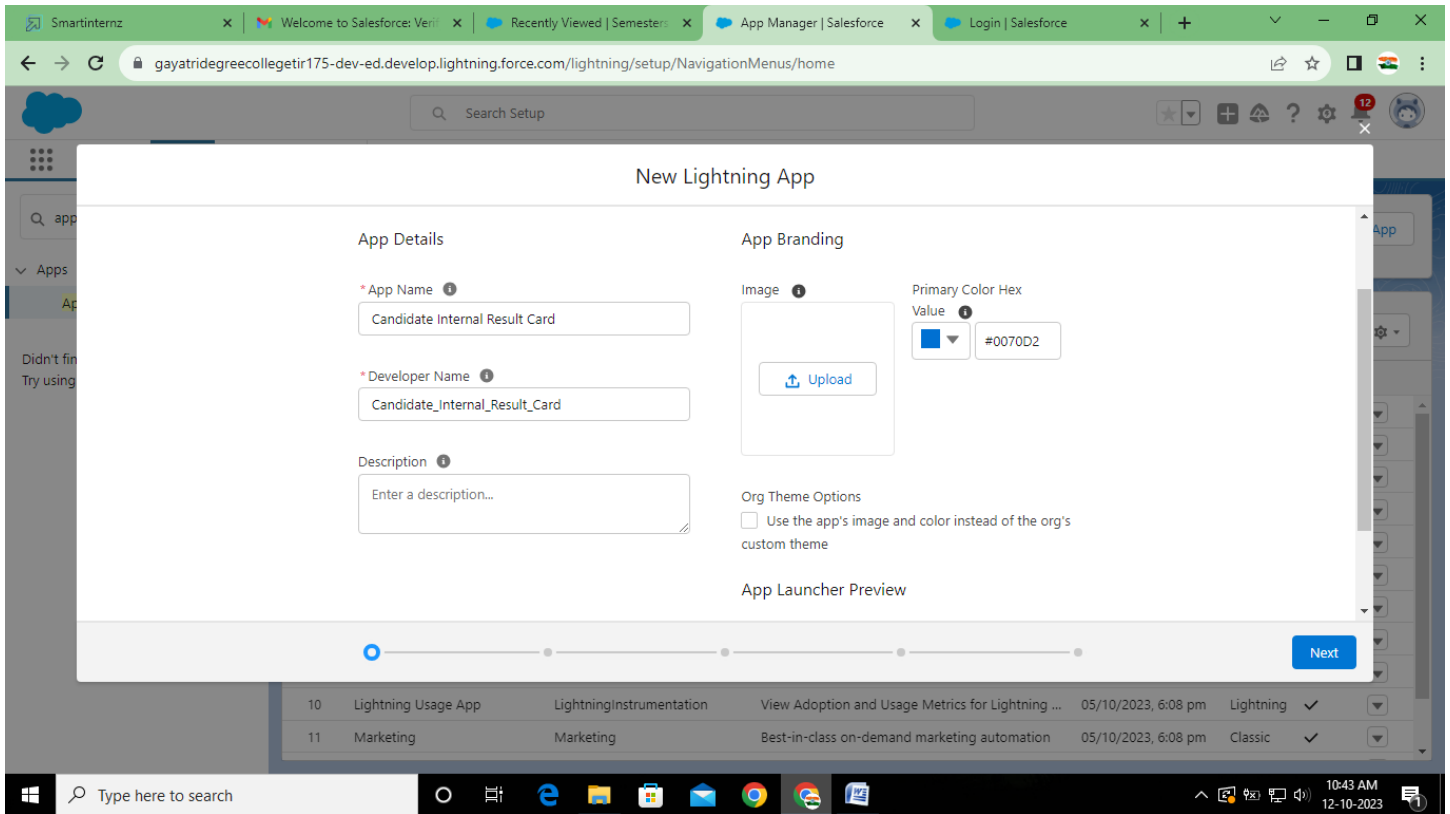


Milestone – 04: Lightning App

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.



Milestone – 05: Fields And Relationship

Object Name	Field Name	Data type
Semester	Semester Name	Text(Standard field)
	Course	Lookup(Course Details)
Candidate	Candidate Name	Text(Standard field)
	Candidate Roll Number	Auto Number
	Semester Name	Lookup(Semester)
Lecturer Details	Lecturer Name	Text(Standard field)
	Lecturer Role	Text
	Course	Lookup(Course Details)
Course Details	Course Name	Text(Standard field)
	Duration (Years)	Number
Internal results	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	Lookup (Course detail)
	Marks	Number
	Status	Pick list Values: Pass Fail

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.

SmartinternzWelcome to Salesforce: VerRecently Viewed | SemesterLecturer Details | SalesforceLogin | Salesforce

gayatridegreecollegेतir175-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004GjB8/Details/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Lecturer Details

Details

Fields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Details

Description

API NameLecturer_Details__cCustom✓Singular LabelLecturer DetailsPlural LabelLecturer Details

Enable Reports✓Track ActivitiesTrack Field HistoryDeployment StatusDeployedHelp SettingsStandard salesforce.com Help Window

EditDelete

Type here to search10:46 AM12-10-2023

SmartinternzWelcome to Salesforce: VerRecently Viewed | SemesterLecturer Details | SalesforceLogin | Salesforce

gayatridegreecollegेतir175-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004GjB8/FieldsAndRelationships/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Lecturer Details

Details

Fields & Relationships

Page LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Fields & Relationships

7 Items, Sorted by Field Label

FIELD LABELFIELD NAMEDATA TYPECONTROLLING FIELDINDEXED

CourseCourse__cLookup(Course Details)✓

Created ByCreatedByIdLookup(User)

Last Modified ByLastModifiedByIdLookup(User)

Lecturer Details NameNameText(80)✓

Lecturer NameLecturer_Name__cText(40)

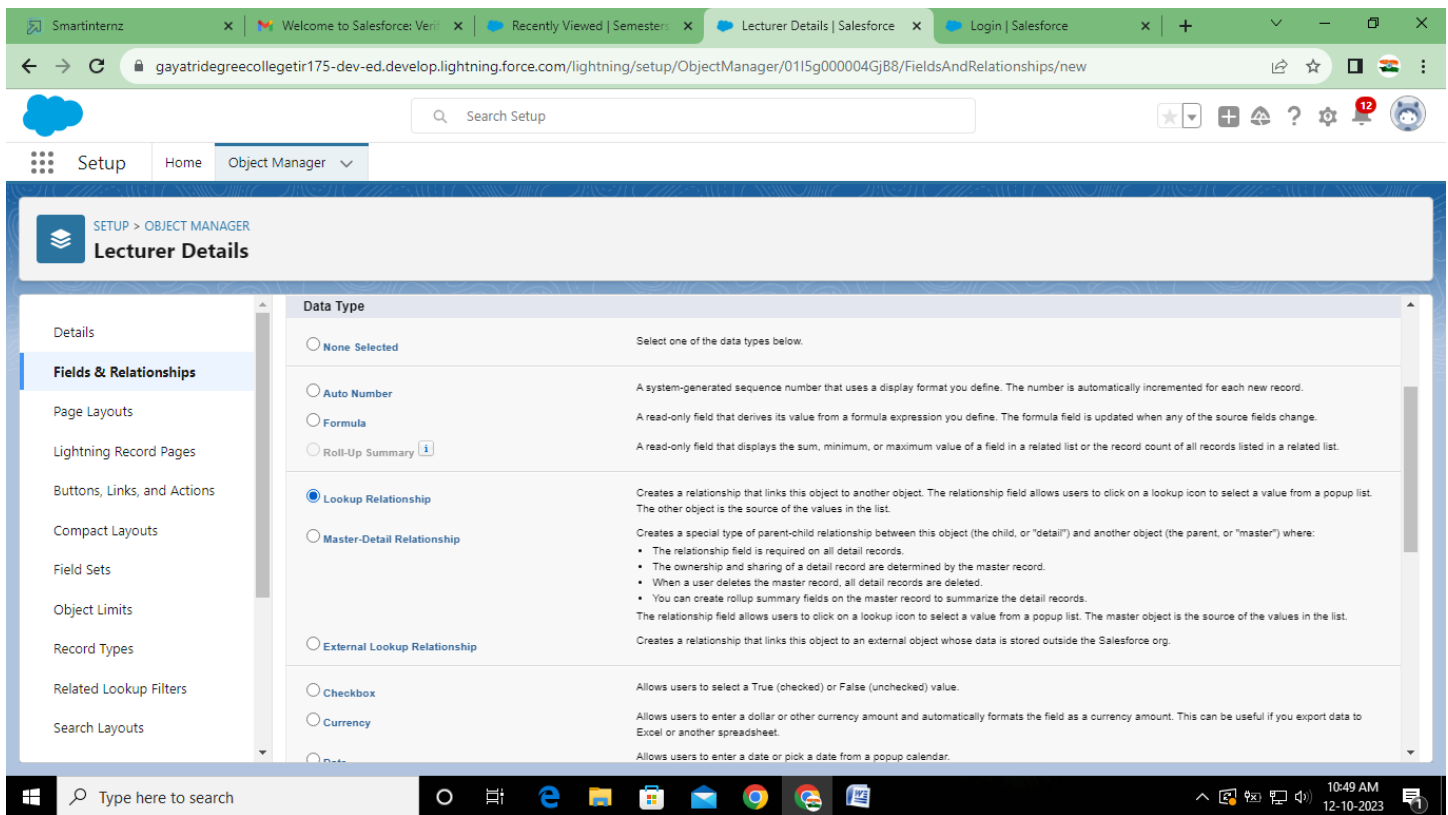
Lecturer RoleLecturer_Role__cText(40)

OwnerOwnerIdLookup(User,Group)✓

Type here to search10:46 AM12-10-2023

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.



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

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 screenshot shows the Salesforce Object Manager interface. The browser tabs include 'Smartinternz', 'Welcome to Salesforce: Veri...', 'Recently Viewed | Semester...', 'Object Manager | Salesforce', and 'Login | Salesforce'. The address bar shows the URL: 'gayatridegreecollegeitir175-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home'. The Salesforce header includes a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section displays a table with one item, 'Lecturer Details'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		07/10/2023	✓

The bottom of the screen shows the Windows taskbar with the search bar and various application icons. The system clock indicates 10:50 AM on 12-10-2023.

SETUP > OBJECT MANAGER

Lecturer Details

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course__c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecturer Details Name	Name	Text(80)		✓
Lecturer Name	Lecturer_Name__c	Text(40)		
Lecturer Role	Lecturer_Role__c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓

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.

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.

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.

Smartinternz x Welcome to Salesforce: Veri x Recently Viewed | Semester x Users | Salesforce x Login | Salesforce x

gayatridegreecollegietir175-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging in In-App and Web User

SETUP Users

All Users

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

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	B.G. Raghu Naik	RB.G	bgraghu@naik@gdcproject.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d5g0000007p2eaf.nfkibharyusea@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Teacher Class	ctec	bork@blue.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5g0000007p2eaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5g0000007p2eaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Type here to search

10:53 AM 12-10-2023

Smartinternz x Welcome to Salesforce: Veri x Recently Viewed | Semester x Users | Salesforce x Login | Salesforce x

gayatridegreecollegietir175-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntity...

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging in In-App and Web User

SETUP Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Required Information

10:53 AM 12-10-2023

Milestone – 07: User 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.

The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `gayatridegreecollegeitir175-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". A left sidebar menu is open, showing a search bar with "CAN" entered. Below the search bar, the "Apps" section is expanded, listing "Candidate Internal Result Card" under the "CI" category. The "Items" section lists "Candidate App page", "Candidates", and "View All". The main content area displays a table of objects with columns: "API NAME", "TYPE", "DESCRIPTION", "LAST MODIFIED", and "DEPLOYED". The table lists several standard objects, including "Account", "Activity", "AlternativePaymentMethod", "API Anomaly Event Store", "Appointment Category", "Appointment Invitation", "Appointment Invitee", "Appointment Topic Time Slot", "Asset", "Asset Action", and "Asset Action Source".

API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Activity	Standard Object			
AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	Standard Object			
Appointment Category	Standard Object			
Appointment Invitation	Standard Object			
Appointment Invitee	Standard Object			
Appointment Topic Time Slot	Standard Object			
Asset	Standard Object			
Asset Action	Standard Object			
Asset Action Source	Standard Object			

Smartinternz x Welcome to Salesforce: Veri x Recently Viewed | Semesters x Recently Viewed | Course De x Login | Salesforce x + -

gayatridegreecolletir175-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent

Search...

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

Course Details Recently Viewed

6 items • Updated a few seconds ago

New Import Change Owner

Search this list...

	Course Details	
1	<input type="checkbox"/> B.Sc (BTCCA)	
2	<input type="checkbox"/> B.Sc (BZC)	
3	<input type="checkbox"/> B.Com (C.A)	
4	<input type="checkbox"/> B.Sc (BCCA)	
5	<input type="checkbox"/> B.Sc (MSCs)	
6	<input type="checkbox"/> B.Sc (MECs)	

https://gayatridegreecolletir175-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/home

Type here to search

10:58 AM 12-10-2023

Smartinternz x Welcome to Salesforce: Veri x Recently Viewed | Semesters x New Course Details | Salesfo x Login | Salesforce x + -

gayatridegreecolletir175-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/new?count=5&nooverride=1&useRecordTypeCheck=1&navigationLocati...

Search...

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

Course Details Recently Viewed

6 items • Updated 2 minutes ago

New Import Change Owner

Search this list...

New Course Details

* = Required Information

Information

* Course Details

Owner

Raghu Naik B G

Duration

Course Name

Cancel Save & New Save

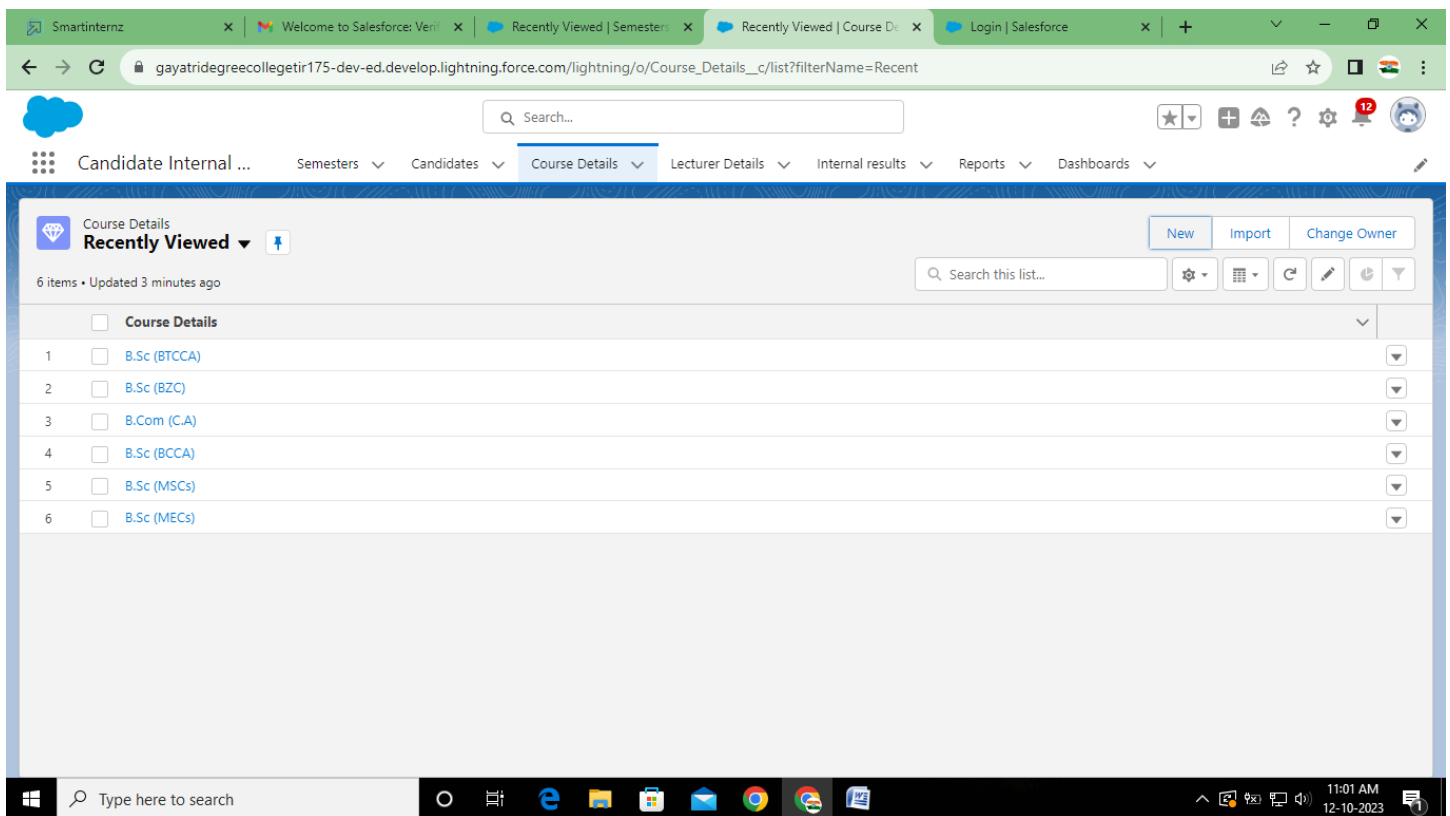
Type here to search

11:01 AM 12-10-2023

View Record (Course Details)

Viewing the Records of Course Detail Object

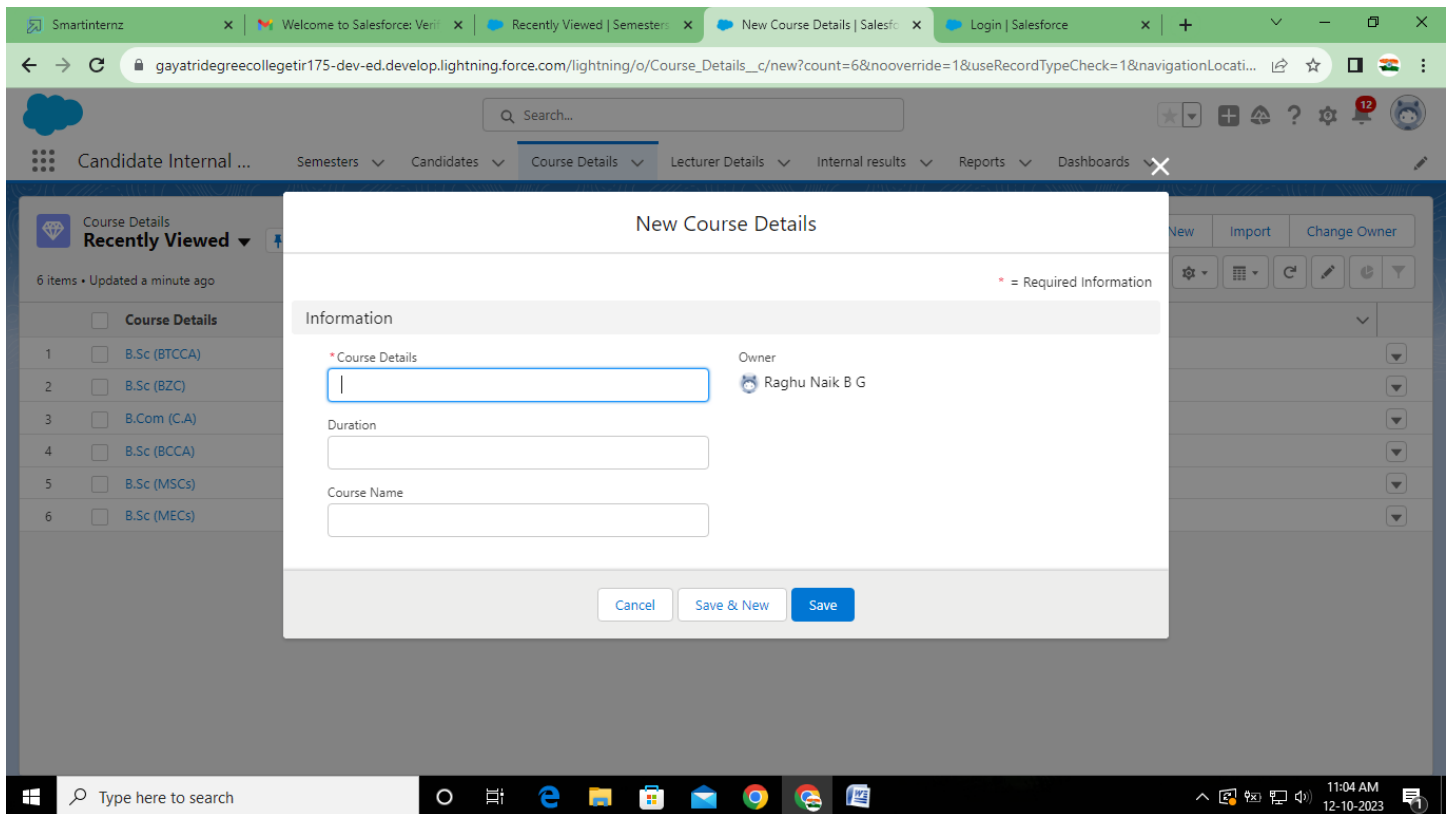
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on any record name. you can see the details of the Driver



The screenshot shows a web browser window with multiple tabs. The active tab is 'Recently Viewed | Course Details'. The URL in the address bar is 'gayatridegreecollegietir175-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent'. The Salesforce interface displays a 'Course Details' section with a 'Recently Viewed' filter. Below this, there is a list of 6 items, each with a checkbox and a course name. The list is as follows:

	Course Details	
1	<input type="checkbox"/> B.Sc (BTCCA)	▼
2	<input type="checkbox"/> B.Sc (BZC)	▼
3	<input type="checkbox"/> B.Com (C.A)	▼
4	<input type="checkbox"/> B.Sc (BCCA)	▼
5	<input type="checkbox"/> B.Sc (MSCs)	▼
6	<input type="checkbox"/> B.Sc (MECs)	▼

The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 11:01 AM on 12-10-2023.



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.

Smartinternz x Welcome to Salesforce: Verit x Recently Viewed | Semesters x Recently Viewed | Course De x Login | Salesforce x + -

gayatridegreecollegietir175-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent

Search...

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

Course Details Recently Viewed 6 items • Updated 2 minutes ago

New Import Change Owner

Search this list...

Course Details

1 B.Sc (BTCCA)

2 B.Sc (BZC)

3 B.Com (C.A)

4 B.Sc (BCCA)

5 B.Sc (MSCs)

6 B.Sc (MECs)

Delete Course Details

Are you sure you want to delete this Course Details?

Cancel Delete

Type here to search

11:04 AM 12-10-2023

Smartinternz x Welcome to Salesforce: Verit x Recently Viewed | Sem x Recently Viewed | Cou x Login | Salesforce x New Tab x + -

gayatridegreecollegietir175-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent

Search...

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

Course Details Recently Viewed 5 items • Updated a few seconds ago

New Import Change Owner

Search this list...

Course Details

1 B.Sc (BZC)

2 B.Com (C.A)

3 B.Sc (BCCA)

4 B.Sc (MSCs)

5 B.Sc (MECs)

Type here to search

11:06 AM 12-10-2023

Milestone – 08: 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 in 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 and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

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

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”).

Smartinternz x Welcome to Salesforce x Recently Viewed | Co x Home | Salesforce x Login | Salesforce x New Tab x

gayatridegreecolleetir175-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

ca

Apps

- Candidate Internal Result Card

Items

- Calendar
- Campaigns
- Candidate App page
- Candidates
- Card Payment Methods
- View More

Optimizer

ADMINISTRATION

- Users
- Data
- Email

PLATFORM TOOLS

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

10 items

NAME TYPE OBJECT

https://gayatridegreecolleetir175-dev-ed.develop.lightning.force.com/lightning/app/06m5g000004IS5vAAE

Type here to search

11:18 AM 12-10-2023

Smartinternz x Welcome to Salesforce x Recently Viewed | Co x Reports | Salesforce x Login | Salesforce x New Tab x

gayatridegreecolleetir175-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

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

Reports

Recent

2 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	5/10/2023, 6:08 pm	
Created by Me	Candidate Internal Result Report		Private Reports	Raghu Naik B G	9/10/2023, 3:47 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

https://gayatridegreecolleetir175-dev-ed.develop.lightning.force.com/lightning/o/Report/home

Type here to search

11:20 AM 12-10-2023

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.

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.

Report: Semesters with Course
Candidate Internal Result Report

Field Editing Enabled

4

Course: Course Name	Course: Duration	Semester: Semester Name	Course: Course Details	Duration
B.Com (Computer Applications) (1)	1 (1)	Sem - 01	B.Com (CA)	Small Course
Subtotal				
Subtotal				
B.Sc (Bio Technology) (1)	1 (1)	Sem - 01	B.Sc (BCCA)	Small Course
Subtotal				
Subtotal				
B.Sc (Electronics) (1)	3 (1)	Sem - 05	B.Sc (MECs)	Large Course
Subtotal				
Subtotal				
B.Sc (Statistics) (1)	2 (1)	Sem - 03	B.Sc (MSCs)	Medium Course
Subtotal				
Subtotal				
Total (4)				

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Milestone – 09: Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then 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.

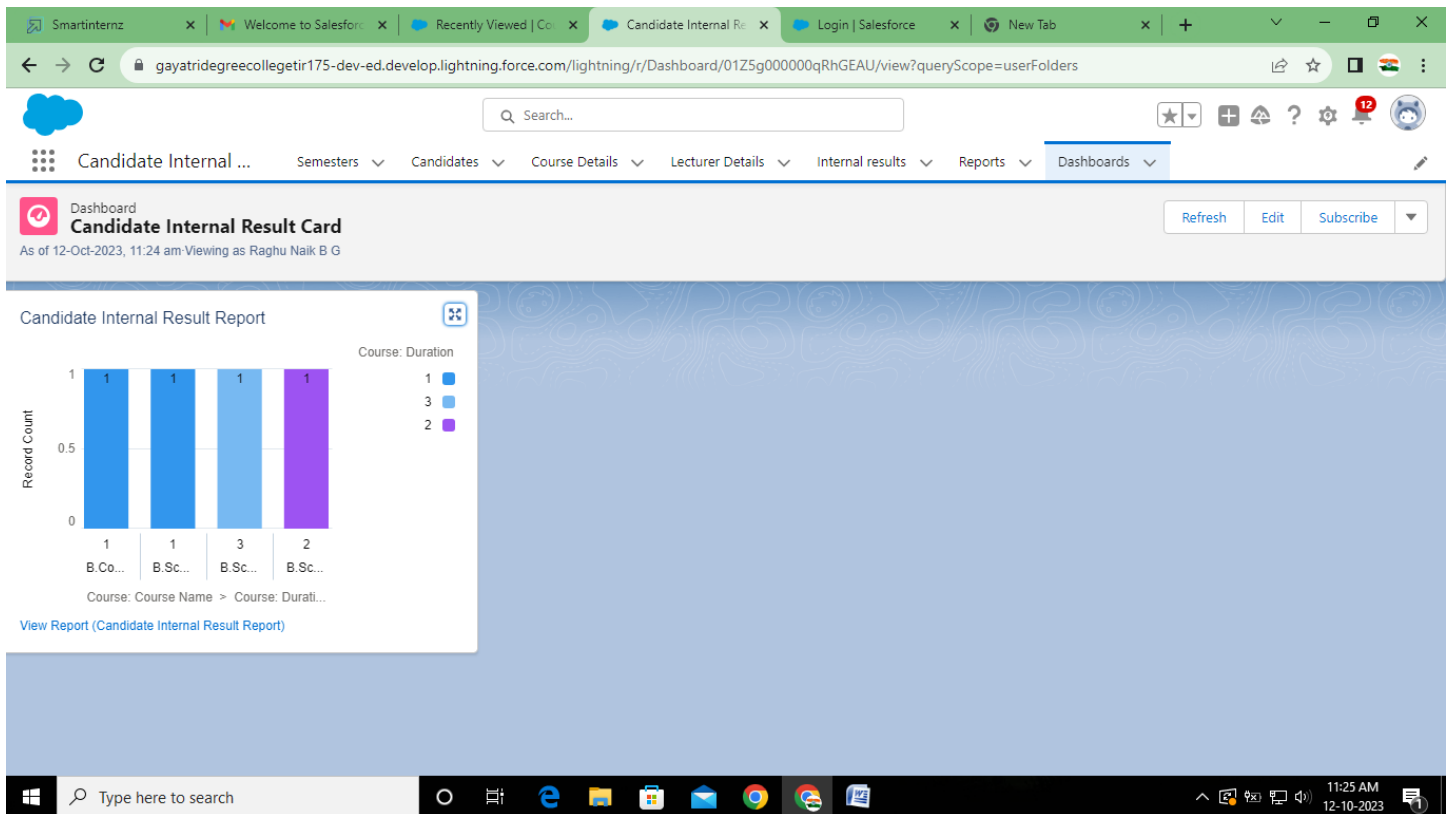
9. Click save.

The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes the Salesforce logo, a search bar, and several utility icons. The main navigation menu on the left lists various sections: Candidate Internal..., Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. The 'Dashboards' section is currently selected. The main content area displays a list of recent dashboards. The first item is 'Candidate Internal Result Card', which is a private dashboard created by Raghu Naik B G on 9/10/2023 at 3:48 pm. The interface also includes a sidebar on the left with filters for 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites). The bottom of the screen shows the Windows taskbar with the search bar and several application icons.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	Raghu Naik B G	9/10/2023, 3:48 pm	

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



Milestone – 10: Screen Flow

In Salesforce, flows are visual representations of business processes that can be created and managed using the Salesforce Flow Builder. Flows are designed to automate and streamline complex business processes, such as collecting data, updating records, and integrating with external systems, without writing any code.

Screen Flows: Screen flows are flows that are designed to guide users through a series of screens to collect data or present information. They are typically used to create user-friendly data entry forms or wizards, and can include input fields, picklists, and other user interface components.

Create A Screen Flow

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow
4. It will open the canvas. Select (+)
5. Select the screen element from the drop down.

6. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label: Candidate info

API Name: Candidate_Info (This field will be auto populated.)

7 . In search Component type text and drag the text component to canva and give the label and Api Name

8. Similarly, Add Email Component also.

9. Select (+)

10. In search bar search for Create records and select the create records

11 . It will open you the details section and give the label as follows:

Label: Create candidate Records

API Name: Create_candidate_Records

Then check the use separate resources and literal values Search for candidate Object

12.Under field type name and select the name and select the candidate_name under Screen Component

13. Click on Done

14. Click on Save. It will open you details canva and give the details as follows:

15. Select (+)

16. Select the Action element from the drop down.

17. Enable Body and Give Hi {!Candidate_Name}, Welcome to the semester

18. Enable Recipient Address List and Give {!Email.value}

19. Enable Subject and Give Welcome

Flow label: Candidate flow

Flow API Name: Candidate_flow (this will be auto populated)

20. Click on save

21.Click on the Activate.

Smartinternz x Welcome to Salesforce x Candidate Internal Re x Flows | Salesforce x Login | Salesforce x New Tab x + - x

gayatridegreecollegietir175-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home

Search Setup

Setup Home Object Manager

flows

Process Automation

Flows

Identity

Login Flows

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

SETUP Flows

Flow Trigger Explorer New Flow

Flow Definitions

All Flows

35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	A...	Te...	Package State	P...	Last Modi...	Last Modified ...
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Cancel Item Flow	Screen Flow	□	✓	Managed-Installed			
Candidate flow	Screen Flow	✓	□	Unmanaged	Raghu Naik B G	09/10/2023, 2:21 pm	
Change Case Owner to Incident Owner	Screen Flow	□	✓	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	□	✓	Managed-Installed			
CMS: Check Whether Any Step is Complet...	Evaluation Flow	✓	✓	Managed-Installed			
CMS: Notify Content Author	Screen Flow	✓	✓	Managed-Installed			
CMS: Review Content	Screen Flow	✓	✓	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	✓	✓	Managed-Installed			

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Type here to search

11:32 AM 12-10-2023

Smartinternz x Welcome to Sale x Candidate Intern x Flows | Salesforce x Candidate flow x Login | Salesforce x New Tab x + - x

gayatridegreecollegietir175-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g0000023CxqAAE

Flow Builder Candidate flow - V1

Select Elements Auto-Layout Version 1: Active—Last modified 3 days ago Run Debug Deactivate Save As Save

Start Screen Flow

Candidate info Screen

Create candidate Records Create Records

Send Email Action

End

Type here to search

11:33 AM 12-10-2023

Milestone – 11: App Page

App page descriptions in Salesforce refer to the metadata and configuration settings that define the visual layout, functionality, and behavior of custom app pages within a Salesforce org. App pages are created using the Salesforce App Builder, which is a visual drag-and-drop tool that allows users to create custom pages without writing code.

Create An App Page

1. Click on the Gear icon and select set up.
2. In Quick Find Box . Type app Builder and select the lightning app builder
3. Select New
4. Select the App page and click on Next
5. Give the label Name.

Label Name: Candidate App page.

6. Select the one region and click on finish.
7. Type the flow in the search bar and select the flow component and drag the component to the Add components here.
8. After dragging the component, give the flow label in the flow search and then click on save and then click on activate. Flow label: Candidate flow
9. After clicking on the activate it will open a page and then select the lightning experience and select the app and then click on add page to the app.

Smartinternz x Welcome to Sales x Candidate Intern x Flows | Salesforce x Lightning App B x Login | Salesforce x New Tab x +

gayatridegreecolletir175-dev-ed.develop.lightning.force.com/lightning/setup/FlexiPageList/home

Search Setup

Setup Home Object Manager

Feature Settings

- Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler Settings
 - Scheduling Policies
 - Skills
- Objects and Fields
 - Object Manager
- User Interface
 - Lightning App Builder
 - Lightning Extension
- Custom Code
 - Lightning Components
 - Debug Mode
 - Lightning Components

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

SETUP Lightning App Builder

The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Lightning Pages

New

Action	Label ↑	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit Clone Del	Candidate App page	Candidate_App_page			App Page	RB G. 09/10/2023, 2:28 pm	RB G. 09/10/2023, 2:28 pm

Smartinternz x Welcome to Sales x Candidate Intern x Flows | Salesforce x Lightning App B x Login | Salesforce x New Tab x +

gayatridegreecolletir175-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?retUrl=%2fone%2fone.app%23%2fsetup%2fpage%3fmodeld%3dFlexiPageLi...

Lightning App Builder Pages

Create a new Lightning page

Build a one-page app for Lightning Experience and the mobile app.

App Page

Home Page

Record Page

Embedded Service Page

Voice Extension

Pipeline by Stage

1.8M

As of Today at 8:00 AM View Report

Recent Items (20)

- Acme Industries - Premium Support Package
 - Account: Acme Industries
 - Close Date: 30/10/2016
 - Amount: \$125,000
 - Owner: Jason DuVar
- Acme Industries - Customer - Direct
 - Type: Customer - Direct
 - Phone: 16151 555-5555
 - Industry: Technology
 - Owner: Jason DuVar
- Acme Industries - Support Request
 - Opportunity: Acme Industries - Premium Support Package

Next

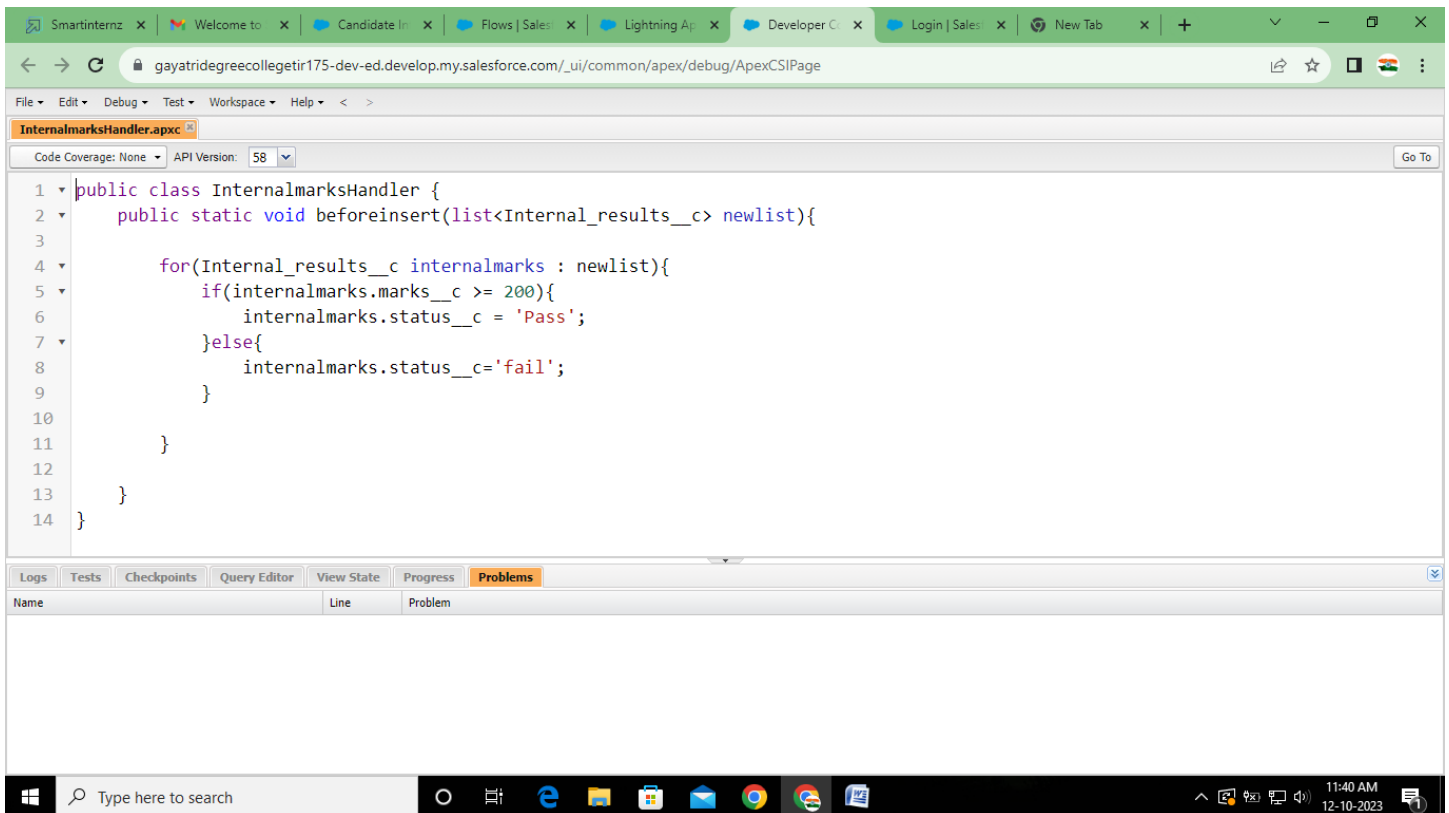
Milestone – 12: Triggers

A trigger refers to an Apex code that is automatically executed before or after certain events occur in the Salesforce platform, such as when a record is inserted, updated, deleted, or undeleted. Triggers are used to automate business processes, enforce data integrity, and perform custom logic on data.

Field Update Using Trigger

Whenever a internal Marks is inserted if the marks is greater than or equal to 200 it must update the status field to Pass or else it must update to fail

1. Go to the gear icon and select the developer console.
2. From the menu bar click on file and select Apex class.
3. Now give the class name as InternalmarksHandler
4. Now Write the below code



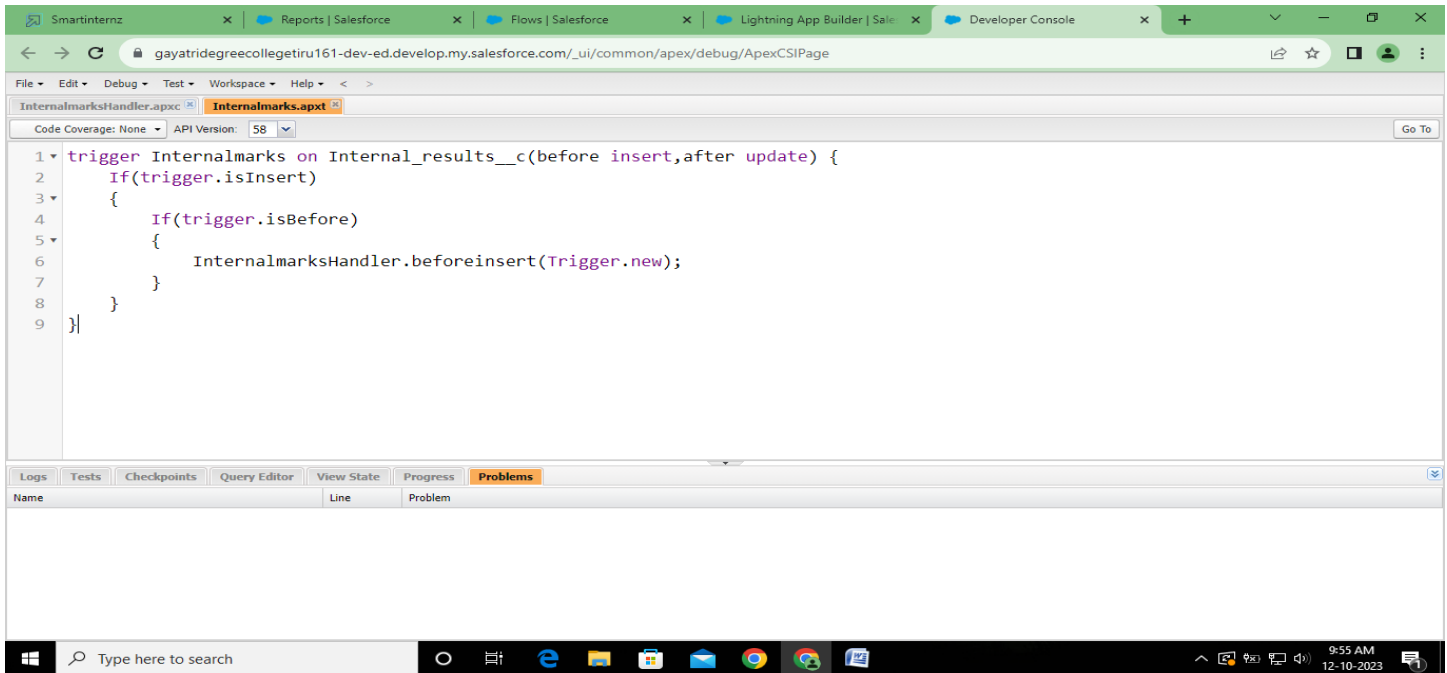
```
1 public class InternalmarksHandler {
2     public static void beforeinsert(list<Internal_results__c> newList){
3
4         for(Internal_results__c internalmarks : newList){
5             if(internalmarks.marks__c >= 200){
6                 internalmarks.status__c = 'Pass';
7             }else{
8                 internalmarks.status__c='fail';
9             }
10        }
11    }
12 }
13 }
14 }
```

5. From the menu bar click on file and select Apex trigger.
6. Now give the trigger name as Internalmarks

7. Now write the below code

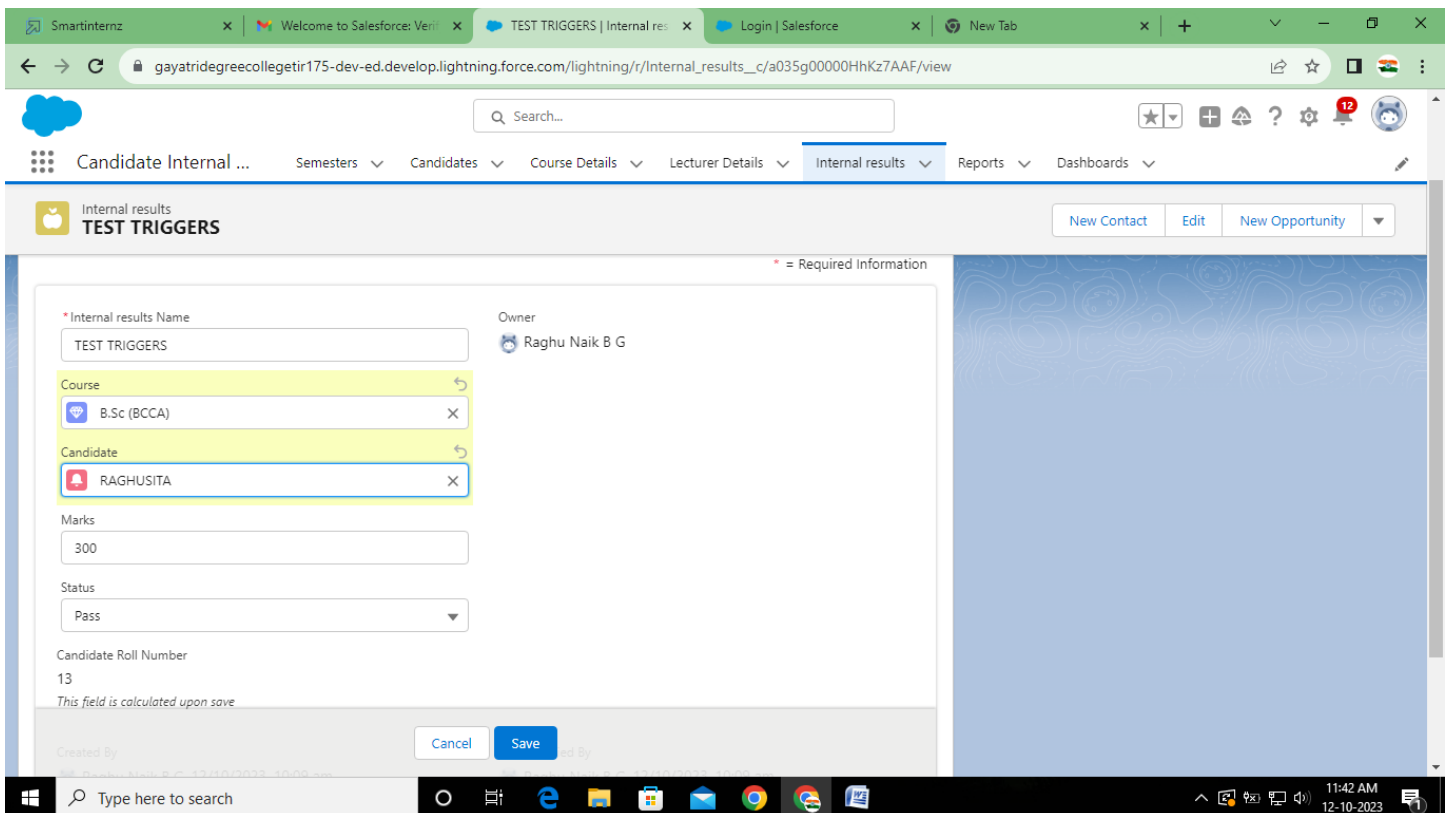
8. Trigger Working as follows:

In the following record Marks field is given as 300, Now trigger triggers and status changes to Pass



```
1 trigger Internalmarks on Internal_results__c(before insert,after update) {
2     If(trigger.isInsert)
3     {
4         If(trigger.isBefore)
5         {
6             InternalmarksHandler.beforeinsert(trigger.new);
7         }
8     }
9 }
```

OUTPUT:



Internal results
TEST TRIGGERS

* Internal results Name: TEST TRIGGERS

Owner: Raghu Naik B G

Course: B.Sc (BCCA)

Candidate: RAGHUSITA

Marks: 300

Status: Pass

Candidate Roll Number: 13

This field is calculated upon save

Created By: [Name] | Edited By: [Name]

Buttons: New Contact, Edit, New Opportunity, Cancel, Save

Smartinternz x Welcome to Salesforce: Veri x TEST TRIGGRS | Internal resu x Login | Salesforce x New Tab x

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Search...

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

Internal results TEST TRIGGRS

Internal results "TEST TRIGGRS" was created. X

New Contact Edit New Opportunity

Related Details

Internal results Name	TEST TRIGGRS	Owner	Raghu Naik B G
Course	B.Sc (BCCA)		
Candidate	SITA RAM		
Marks	300		
Status	Pass		
Candidate Roll Number	14		
Created By	Raghu Naik B G, 12/10/2023, 11:53 am	Last Modified By	Raghu Naik B G, 12/10/2023, 11:53 am

Type here to search

11:53 AM 12-10-2023

THE END