

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**

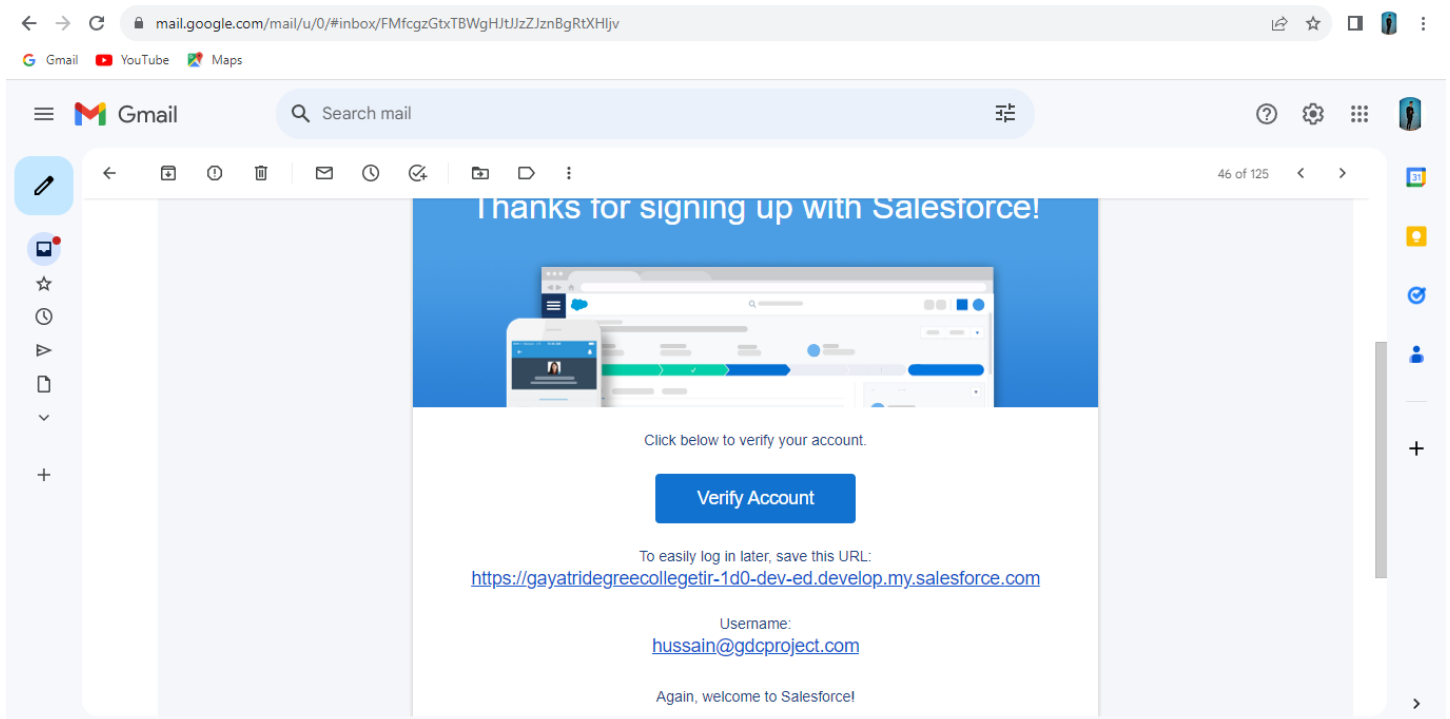
Click on sign up.

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

1. First name & Last name – SHAIK & MOHAMMAD HUSSAIN BASHA
2. Email – shaikhussain3355@gmail.com
3. Role: Developer
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: hussain@gdcproject.com

Account Activation

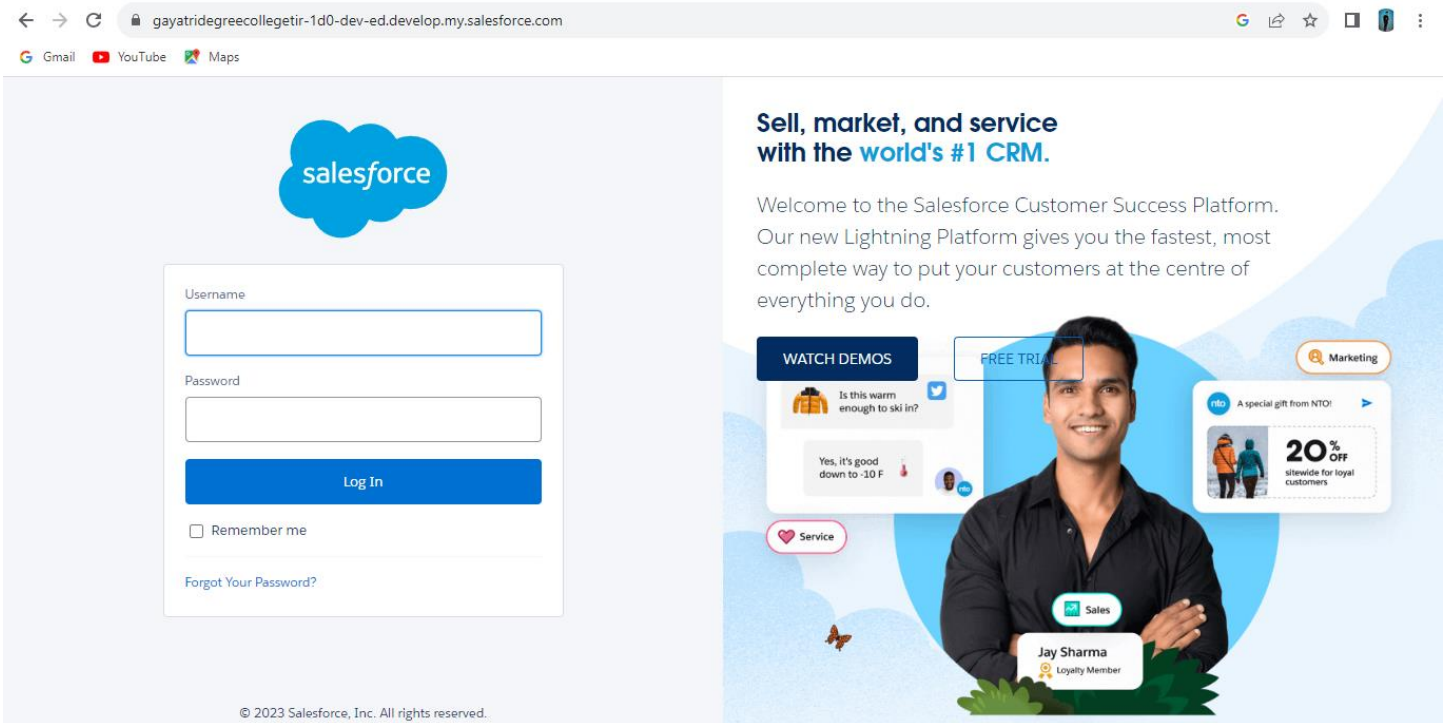
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login to Your Salesforce Account

1. Go to salesforce.com and click on login.

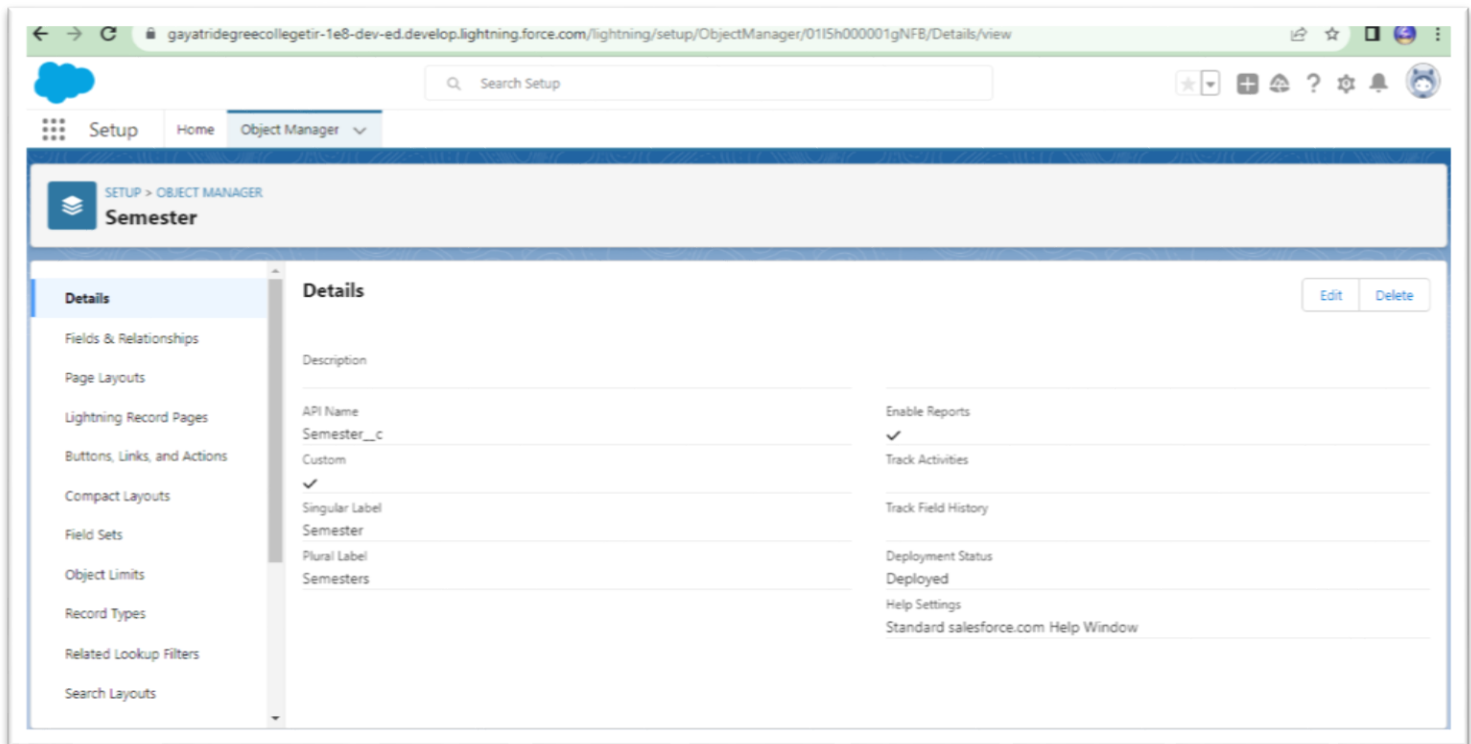
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Milestone – 02: Creation of Objects

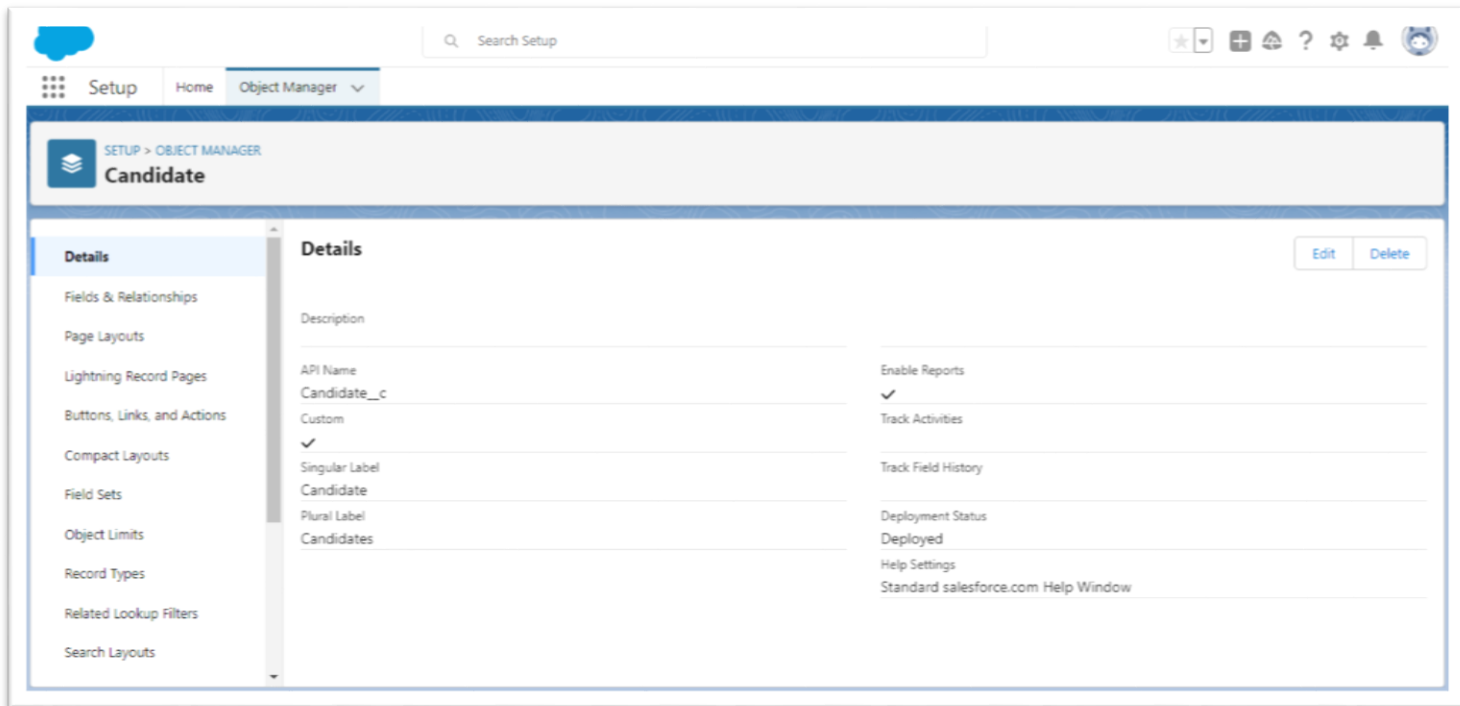
Object – Semester:

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.



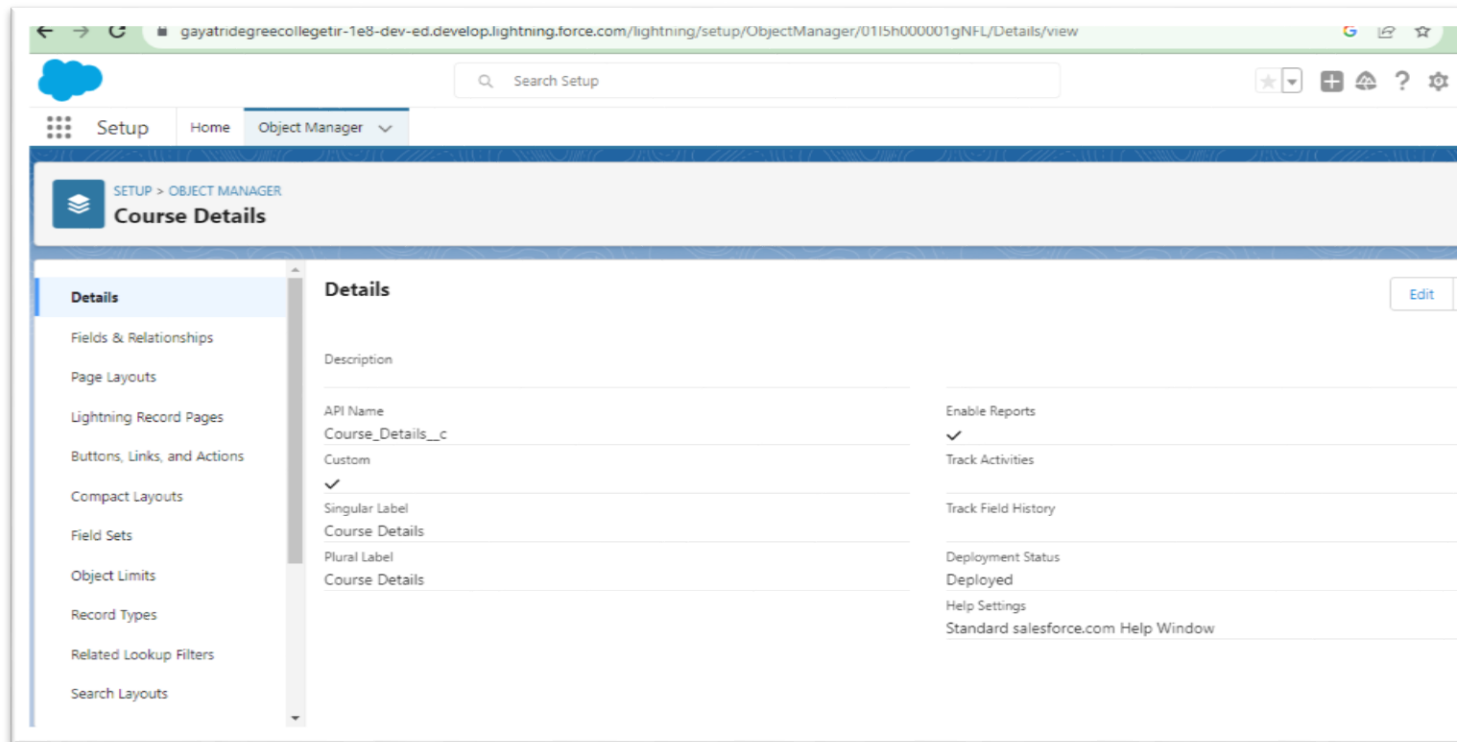
Object- Candidate

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.



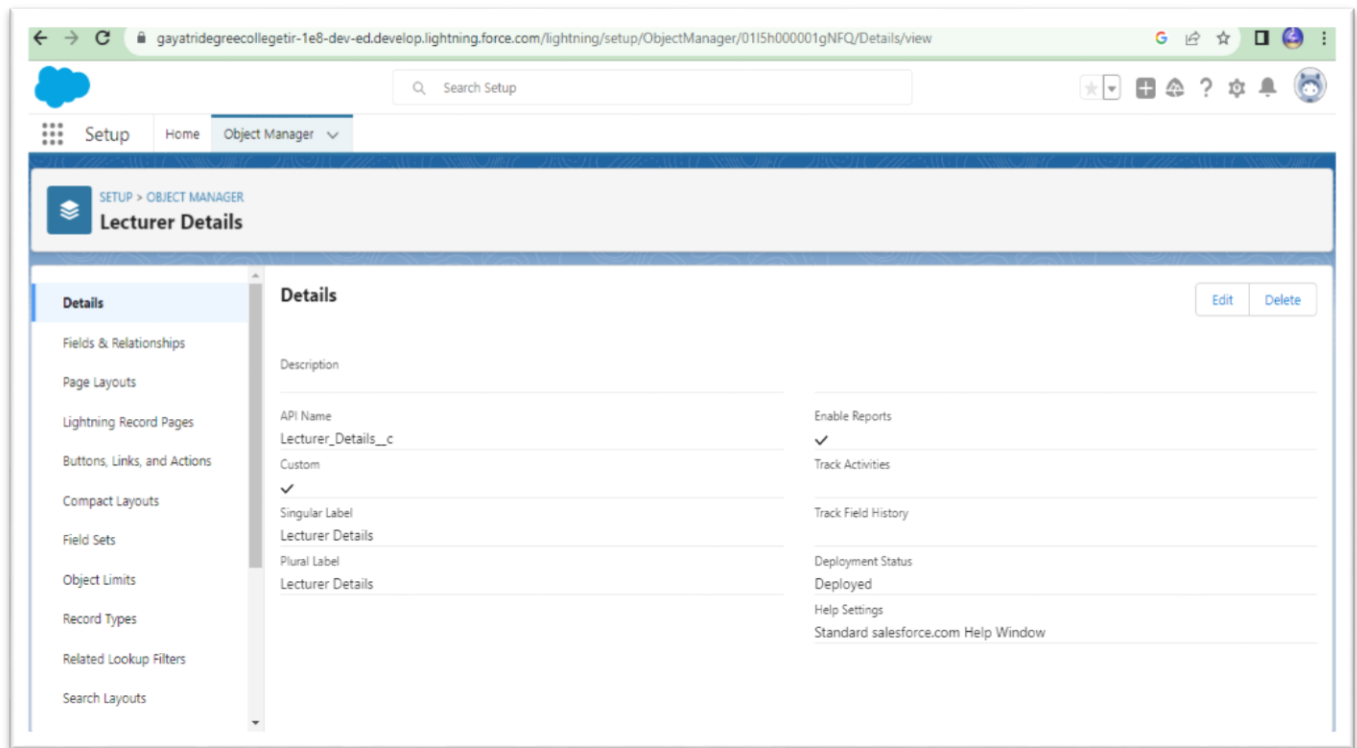
Object - Course Details

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.



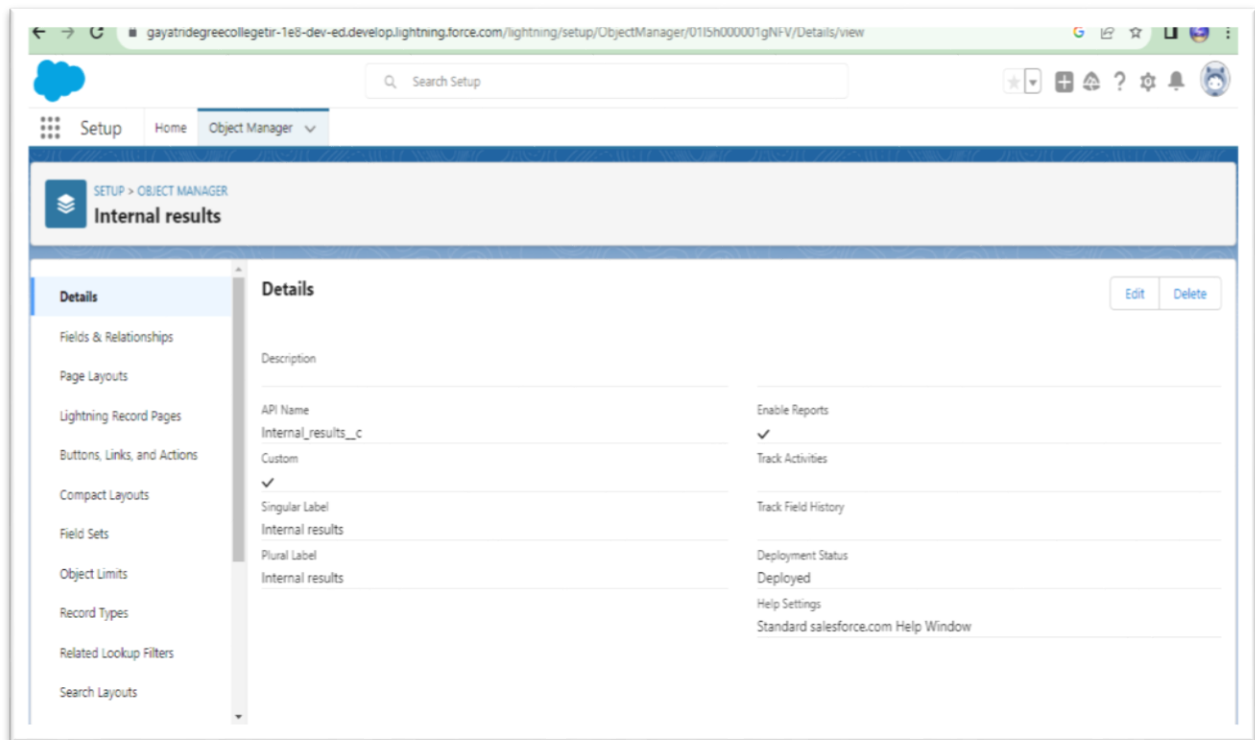
Object - Lecturer Details

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 .

The screenshot shows the Salesforce Setup page for Custom Tabs. The left sidebar has a search bar with 'tabs' entered and a list of navigation items including 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a section for 'Custom Object Tabs' with a 'New' button and a 'What Is This?' link. The table below lists five custom object tabs with their respective icons and labels. Below this is a section for 'Web Tabs' with a 'New' button and a 'What Is This?' link.

Action	Label	Tab Style	Description
Edit Del	Candidates	Heart	
Edit Del	Course Details	IP Phone	
Edit Del	Internal results	Bank	
Edit Del	Lecturer Details	Car	
Edit Del	Semesters	Credit card	

V

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.

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🔍

🔖

🌐

⋮

←Lightning App BuilderApp SettingsPages▼Candidate Internal Result Card? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Candidate Internal Result Card

* Developer Name ⓘ
Candidate_Internal_Result_Card


Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview


←

→

↻

gayatridegreecollegetir-1e8-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u5h000003Xh4dAAC&retUrl=https%3A%2F%2Fgayatridegreec...

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←Lightning App BuilderApp SettingsPages▼Candidate Internal Result Card? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

🔄 Create ▼

Type to filter list...

Accounts

Alert Settings

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Invitations

Approval Requests

Selected Items

Semesters

Candidates

Course Details

Lecturer Details

Lecturer Details

Reports

Dashboards

javascript:void(0);

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.

gayatridegreecollegetir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

SETUP Object Manager
1 Items, Sorted by Label

lect Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		09/10/2023	✓

gayatridegreecollegetir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5h000001gNFQ/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lecturer Details

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Fields & Relationships
6 Items, Sorted by Field Label

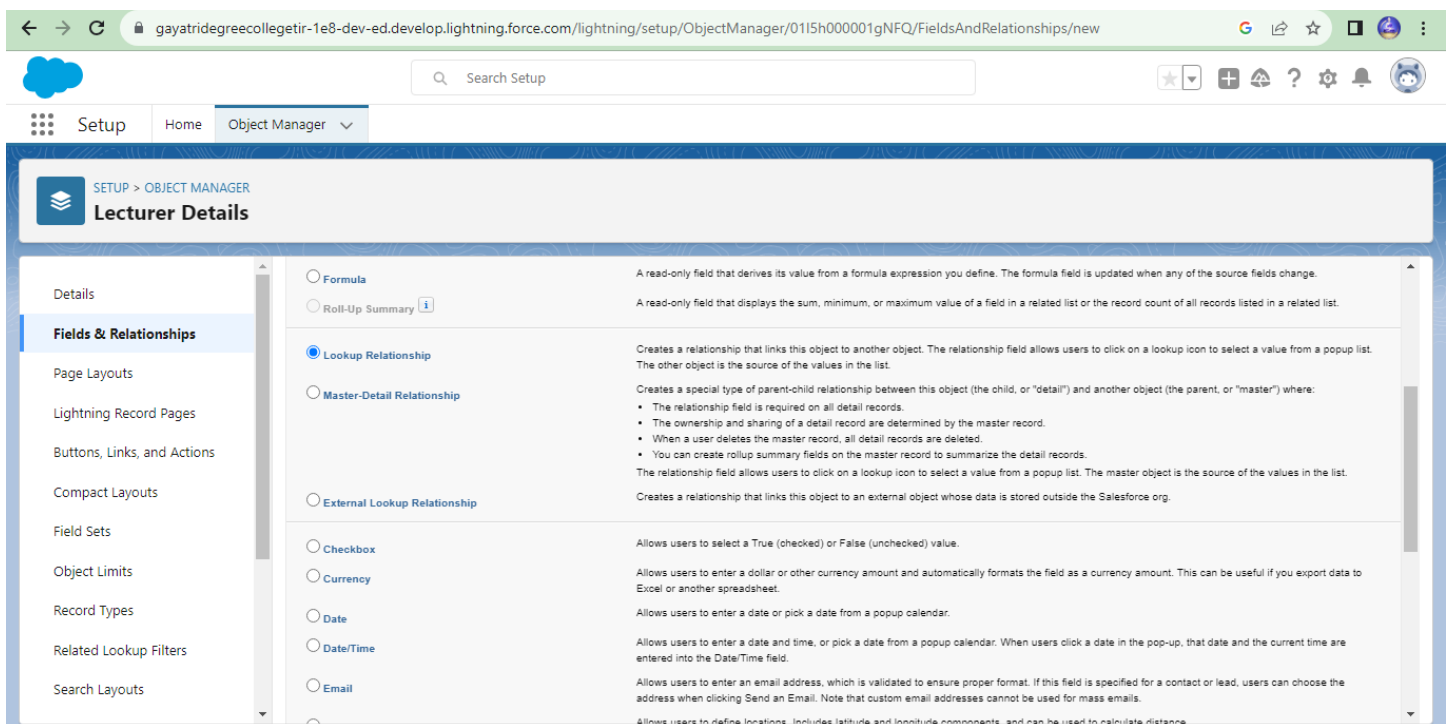
Quick Find New Deleted Fields Field Dependencies Set History Tracking

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 Role	Lecturer_Role__c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓

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 address bar displays the URL: `gayatridegreecolleetir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar labeled "Search Setup", and navigation icons. Below the header, the "Object Manager" section is active, showing a search bar with the text "led", a "Schema Builder" button, and a "Create" button. A table lists the objects, with one entry visible:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		09/10/2023	✓

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu on the left has tabs for Setup, Home, and Object Manager. The Object Manager tab is selected, and the 'Lecturer Details' page is displayed. The left sidebar shows a list of navigation options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'Lecturer' object, sorted by field label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Course, Created By, Last Modified By, Lecturer Details Name, Lecturer Role, and Owner.

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 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.

← → ↻ gayatridegreecolletir-19d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Gmail YouTube Maps

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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

New User Reset Password(s) Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000dc8p9ead.pegkqphcstvg@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	GANESH SIRASANI	SGANE	ganeshsirasani@odcproject.com		✓	System Administrator
<input type="checkbox"/> Edit	Teacher Class	cleac	ganeshsirasani@2023gmail.com		✓	Standard User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5j00000dc8p9ead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5j00000dc8p9ead.com		✓	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

← → ↻ gayatridegreecolletir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUser...

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Users

New User

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

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.

Search Setup

Quick Find Schema Builder Create

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			

← → ↻ gayatridegreecollegetir-1d0-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent

Gmail YouTube Maps

Search...

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

Course Details Recently Viewed

4 items • Updated a few seconds ago

Search this list...

New Import Change Owner

<input type="checkbox"/>	Course Details Name	
1 <input type="checkbox"/>	Bsc(MSCS)	▼
2 <input type="checkbox"/>	B.com	▼
3 <input type="checkbox"/>	Bsc(MECS)	▼
4 <input type="checkbox"/>	Bsc(BCCA)	▼

← → ↻ gayatridegreecollegetir-1d0-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/new?count=28&nooverride=1&useRecordTypeCheck=1&navigation...

Gmail YouTube Maps

Search...

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

Course Details Recently Viewed

4 items • Updated a minute ago

New Import Change Owner

Search this list...

New Course Details

* = Required Information

Information

*Course Details Name

Owner SHAIK MOHAMMAD HUSSAIN BASHA

Course Name

Duration

Cancel Save & New Save

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 the Salesforce Lightning interface. The browser address bar displays the URL: `gayatridegreecollegitir-1e8-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent`. The top navigation bar includes a search bar and a menu with items: Candidate Internal ..., Semesters, Candidates, Course Details (selected), Lecturer Details, Internal results, Reports, and Dashboards. A dropdown menu is open under the 'Candidate Internal ...' item, showing a search bar with 'can' and a list of results under 'Apps' and 'Items'. The 'Apps' section lists 'Candidate Internal Result Card' with a 'CI' icon. The 'Items' section lists 'Candidate App page' and 'Candidates'. A 'View All' link is at the bottom of the dropdown. The main content area shows a table with columns for 'Search this list...' and a dropdown menu. The table is currently empty.

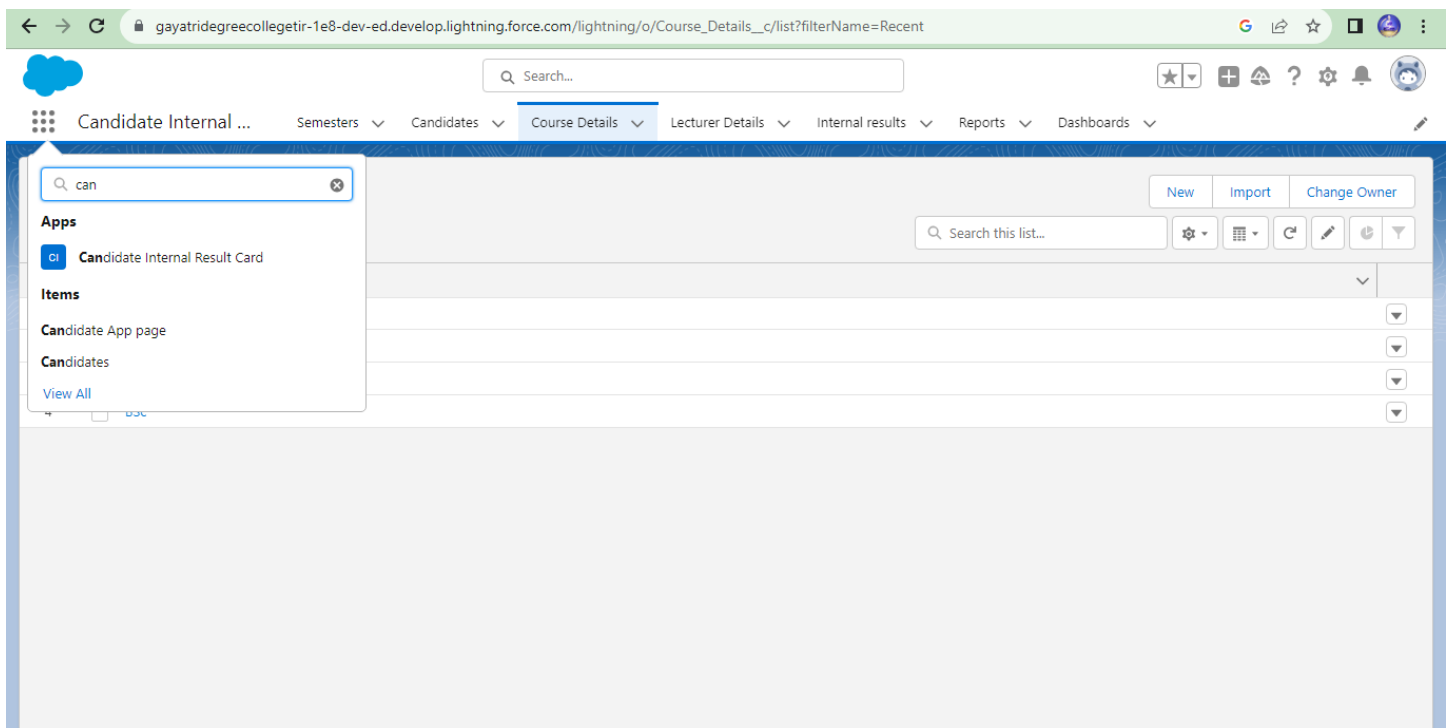
The screenshot shows the Salesforce Lightning interface. The browser address bar displays the URL: `gayatridegreecollegitir-1d0-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/list?filterName=Recent`. The top navigation bar includes a search bar and a menu with items: Candidate Internal ..., Semesters, Candidates, Course Details (selected), Lecturer Details, Internal results, Reports, and Dashboards. The main content area shows a table with columns for 'Course Details Name' and a dropdown menu. The table is titled 'Recently Viewed' and contains 4 items. The items are listed in a table with columns for 'Course Details Name' and a dropdown menu.

	Course Details Name	
1	Bsc(MSCS)	
2	B.com	
3	Bsc(MECS)	
4	Bsc(BCCA)	

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.



Course Details

Recently Viewed

4 items • Updated 2 minutes ago

Search this list...

	Course Details Name	
1	<input type="checkbox"/> Bsc(MSCS)	▼
2	<input type="checkbox"/> B.com	▼
3	<input type="checkbox"/> Bsc(MECS)	▼
4	<input type="checkbox"/> Bsc(BCCA)	▼

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”).

← → ↻

gayatridegreecollegietir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

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🔍

⚙️

🔔

👤

☁️

Search Setup

Setup

Home

Object Manager

🔍 cand

Apps

Candidate Internal Result Card

Items

Candidate App page

Candidates

View All

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
------	------	--------

← → ↻

gayatridegreecollegietir-1d0-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

📧 Gmail

📺 YouTube

📍 Maps

☁️

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	Candidate Internal Result Report		Private Reports	SHAIK MOHAMMAD HUSSAIN BASHA	9/10/2023, 12:48 pm	
Created by Me	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, 9:13 pm	

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

- . 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.

gayatridegreecollegietir-1d0-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWY0iJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp...

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

REPORT Candidate Internal Result Report Semesters with Course Add Chart Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Course: Course Name	Semester: Semester Name	Course: Course Details Name	Course: Duration	Duration
BCCA (1)	Sem-01	Bsc(BCCA)	3	Large Course
Subtotal			3	
CA (1)	Sem-03	B.com	5	Large Course
Subtotal			5	
MECS (1)	Sem-02	Bsc(MECS)	4	Large Course
Subtotal			4	
MSCS (1)	Sem-04	Bsc(MSCS)	2	Medium Course
Subtotal			2	
Total (4)			14	

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

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.

← → ↻ gayatridegreecollegetir-1d0-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gmail YouTube Maps

Search...

★ + ? ⚙️ 🔔

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

Dashboards

Recent

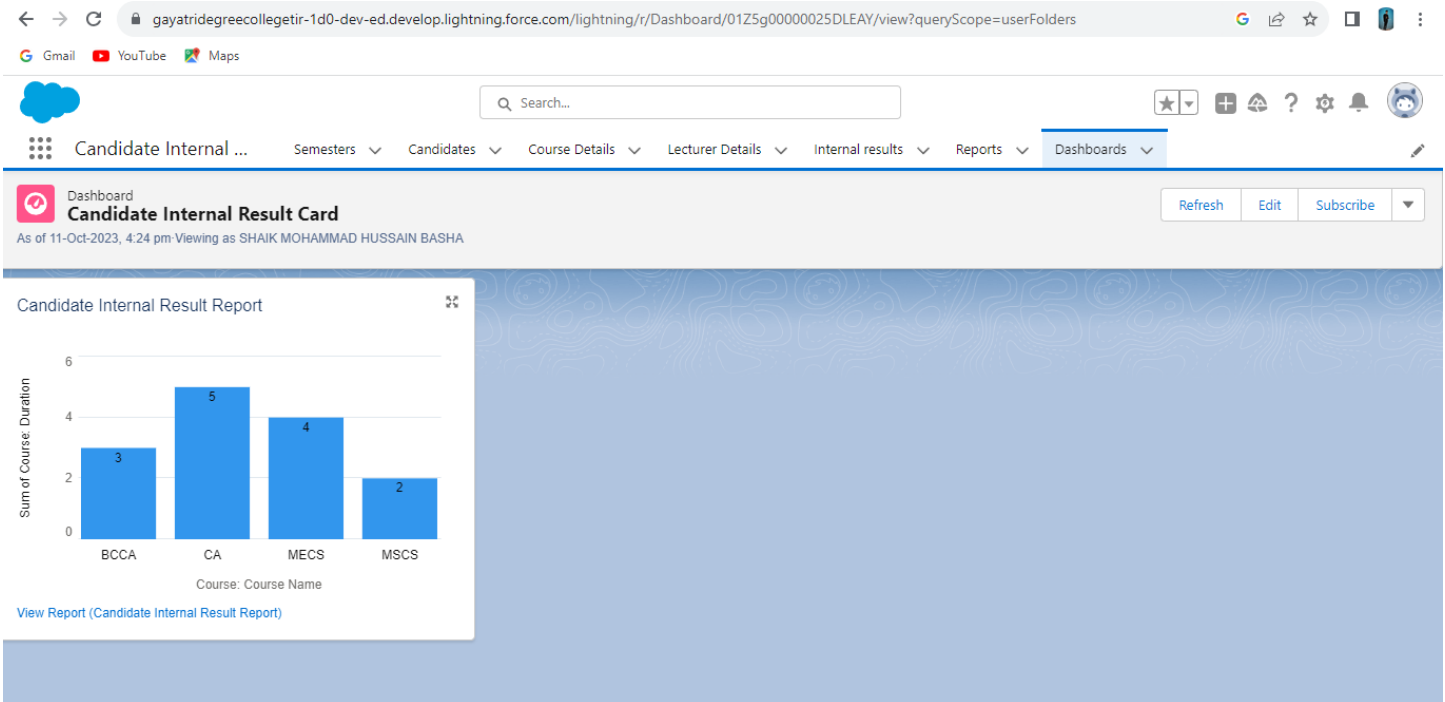
1 item

Search recent dashboards... New Dashboard New Folder ⚙️

DASHBOARDS	Dashboard Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	SHAIK MOHAMMAD HUSSAIN BASHA	9/10/2023, 12:50 pm	▼
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

View Dashboard

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



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.

← → ↻ gayatridegreecolleetir-1d0-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

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 Modified By	Last Modified ...
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed			
Book Appointment from In...	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Cancel Item Flow	Screen Flow	□	✓	Managed-Installed			
Candidate flow	Screen Flow	✓	□	Unmanaged		SHAIK MOHAMMAD HUSSAI...	09/10/2023, 2:24 pm
Change Case Owner to Inc...	Screen Flow	□	✓	Managed-Installed			
Close Change Request & R...	Screen Flow	□	✓	Managed-Installed			
CMS: Check Whether Any ...	Evaluation Flow	✓	✓	Managed-Installed			
CMS: Notify Content Author	Screen Flow	✓	✓	Managed-Installed			
CMS: Review Content	Screen Flow	✓	✓	Managed-Installed			

← → ↻ gayatridegreecolleetiru161-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000001PhfFAAS

Flow Builder Candidate flow - V1

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

Screen Flow Start

Candidate info Screen

Create candidate Records Create Records

Send Email Action

End

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

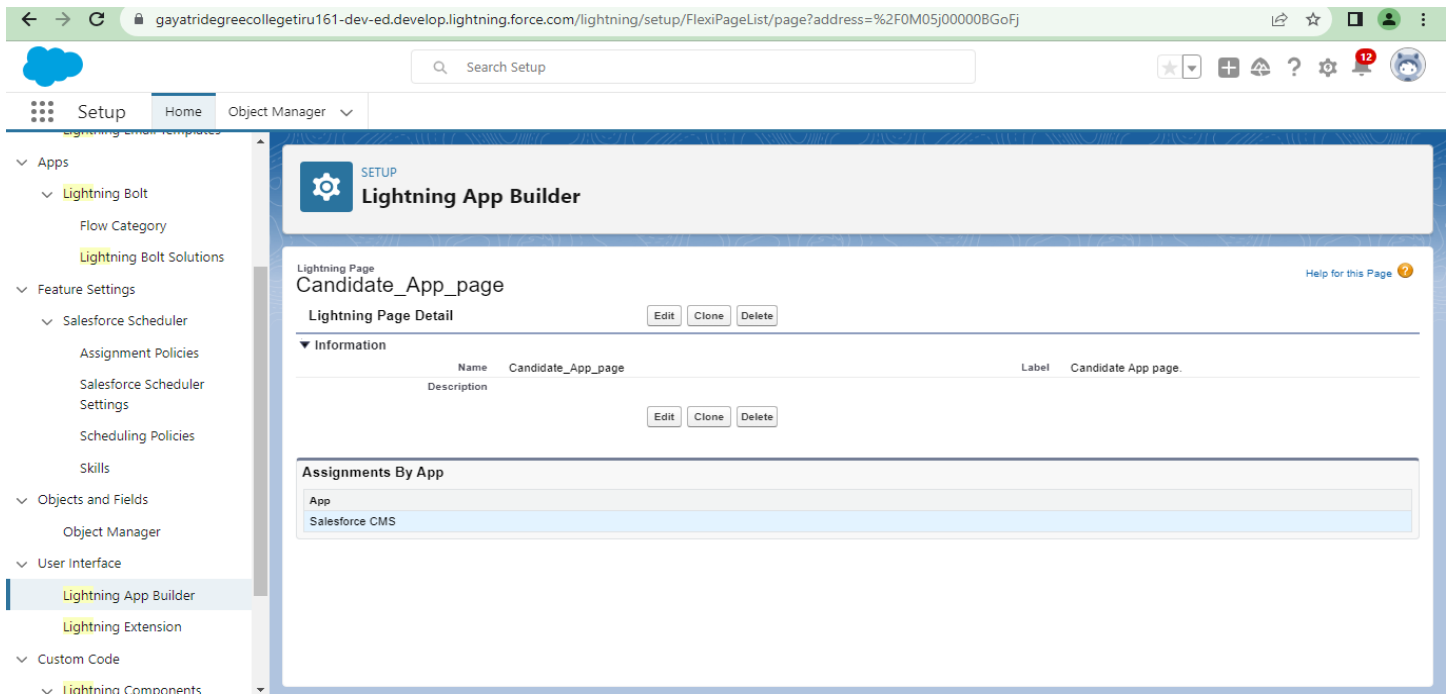
1. Click on the Gear icon and select set up.
2. In Quick Find Box . Type app Builder and select the lightning app builder
3. Select New
- 4.Select the App page and click on Next
5. Give the label Name.

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.

The screenshot shows the Salesforce Lightning App Builder interface. On the left is a navigation menu with categories like Apps, Feature Settings, Objects and Fields, User Interface, and Custom Code. The 'Lightning App Builder' option is selected under the User Interface category. The main content area displays the 'Lightning Pages' table. The table has columns for Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. A single row is visible with the label 'Candidate App page' and name 'Candidate_App_page', of type 'App Page', created and last modified on 09/10/2023 at 12:20 pm by user CM.

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit Clone Del	Candidate App page.	Candidate_App_page			App Page	CM 09/10/2023, 12:20 pm	CM 09/10/2023, 12:20 pm



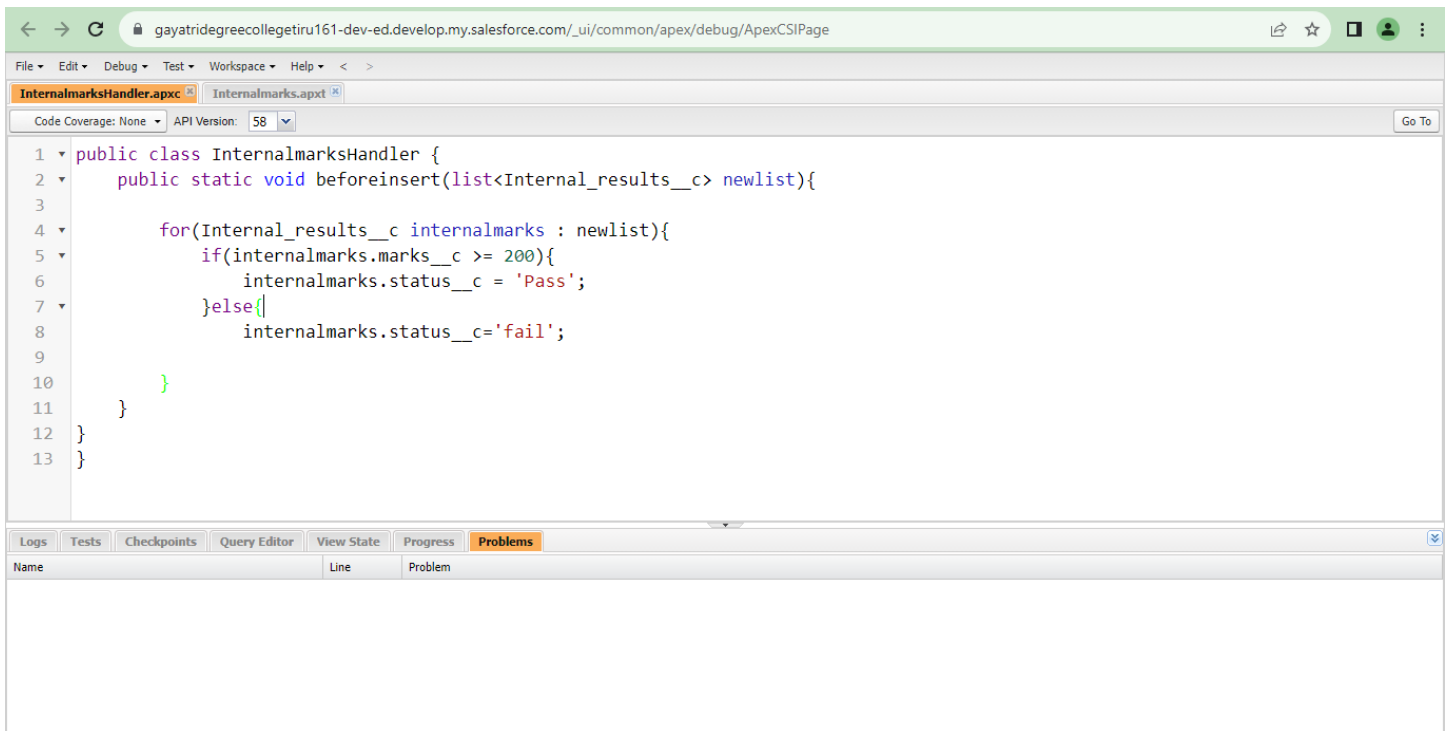
Milestone – 12: Triggers

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

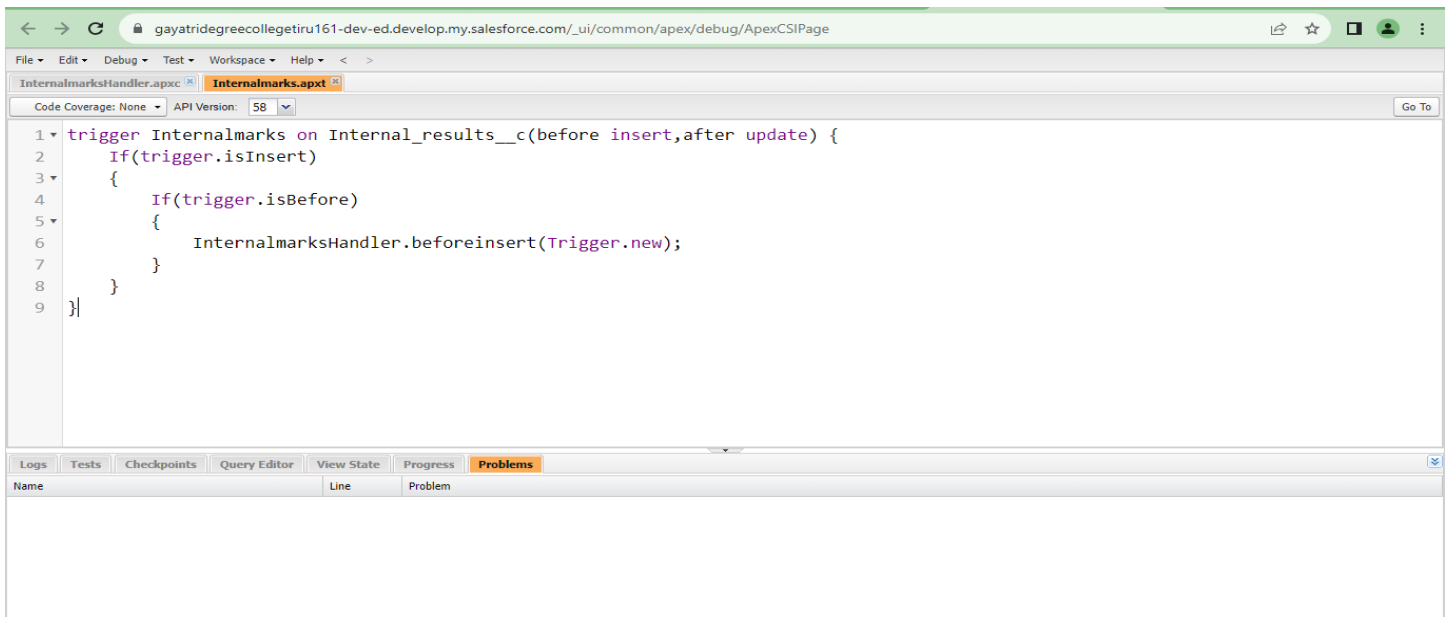
Whenever a internal Marks is inserted if the marks is greater than or equal to 200 it must update the status field to Pass or else it must update to fail

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 }
```

- 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:

Windows taskbar and browser tabs are visible at the top. The browser address bar shows the Salesforce URL: `gayatriegreecollegetir-1d0-dev-ed.develop.lightning.force.com/lightning/o/Internal_results__c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigatio...`

The Salesforce interface shows a "Candidate Internal ..." page. A modal window titled "Information" is open, displaying the following fields:

- Internal results Name:** TEST TRIGGERS
- Candidate:** HUSSAIN
- Course:** Bsc(BCCA)
- Status:** --None--
- Marks:** 300
- Owner:** SHAIK MOHAMMAD HUSSAIN BASHA

Buttons at the bottom of the modal are "Cancel", "Save & New", and "Save".

The browser tabs now include "TEST TRIGGERS | Internal results". The address bar shows the record URL: `gayatriegreecollegetir-1d0-dev-ed.develop.lightning.force.com/lightning/r/Internal_results__c/a045g00000GbmYAAAR/view`

The Salesforce interface shows the "Internal results" page for the record "TEST TRIGGERS". A green confirmation message at the top states: "Internal results 'TEST TRIGGERS' was created." Below this, the record details are displayed:

- Internal results Name:** TEST TRIGGERS
- Candidate:** HUSSAIN
- Course:** Bsc(BCCA)
- Candidate Roll Number:** 4
- Status:** Pass
- Marks:** 300
- Owner:** SHAIK MOHAMMAD HUSSAIN BASHA
- Created By:** SHAIK MOHAMMAD HUSSAIN BASHA, 12/10/2023, 12:53 pm
- Last Modified By:** SHAIK MOHAMMAD HUSSAIN BASHA, 12/10/2023, 12:53 pm

Buttons at the top right of the record page are "New Contact", "Edit", and "New Opportunity".

THE END