

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**

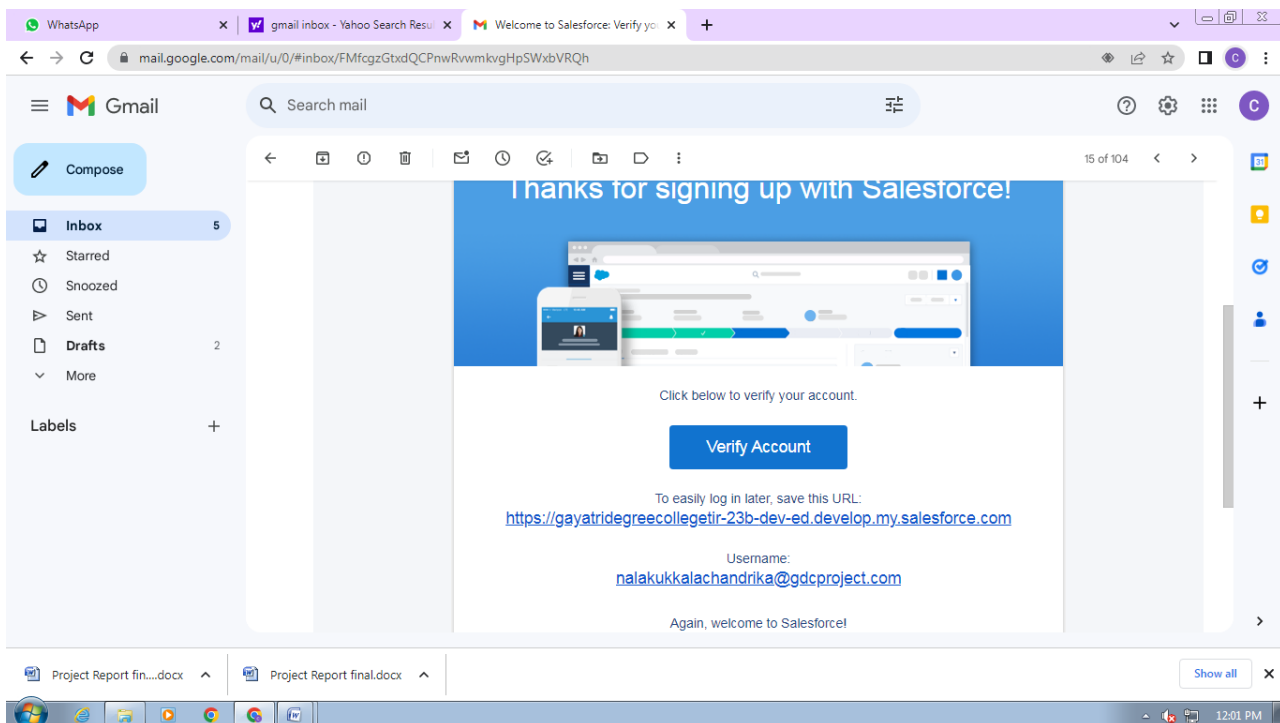
Click on sign up.

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

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

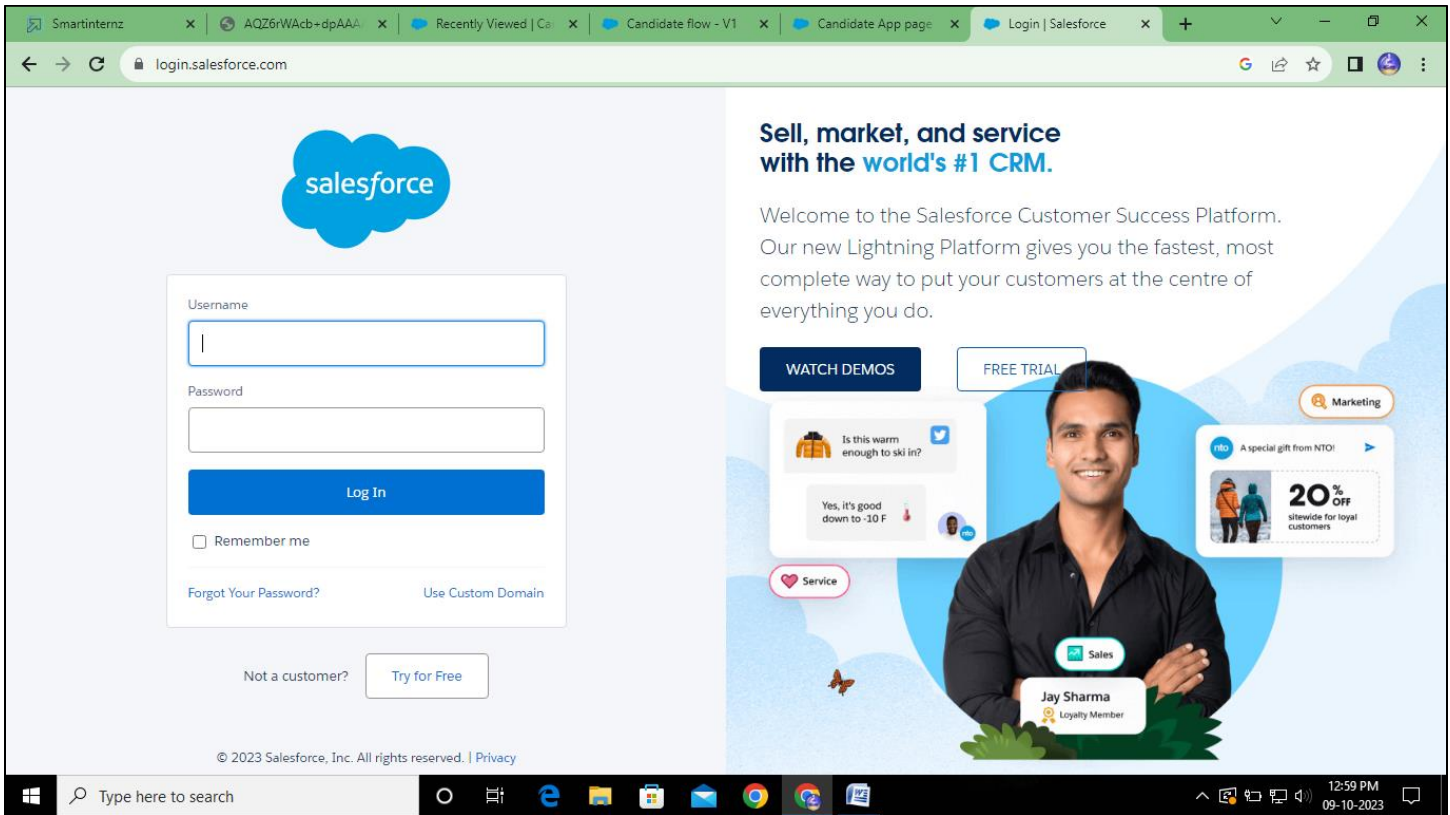
Account Activation

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

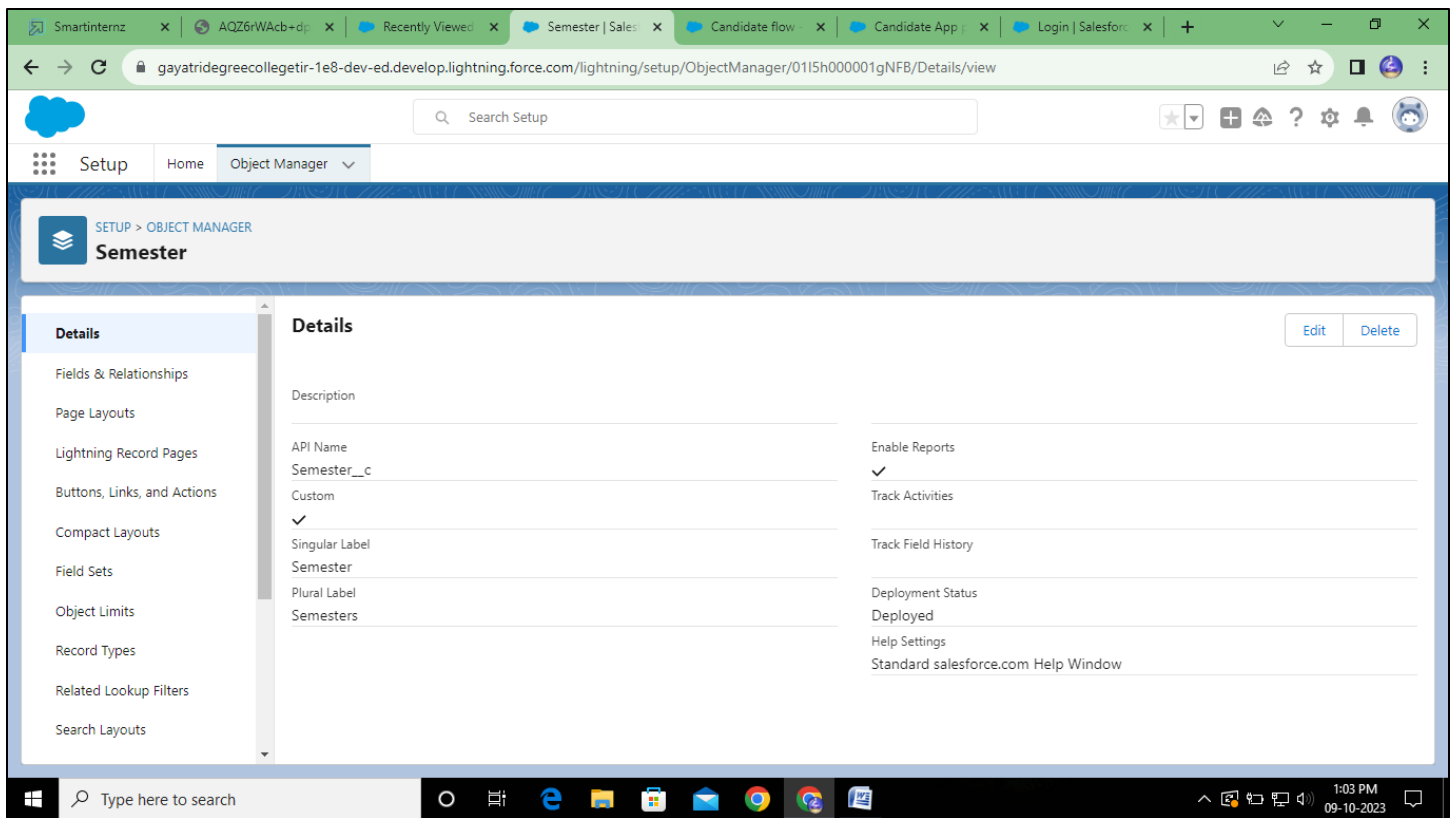
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Milestone – 02: Creation of Objects

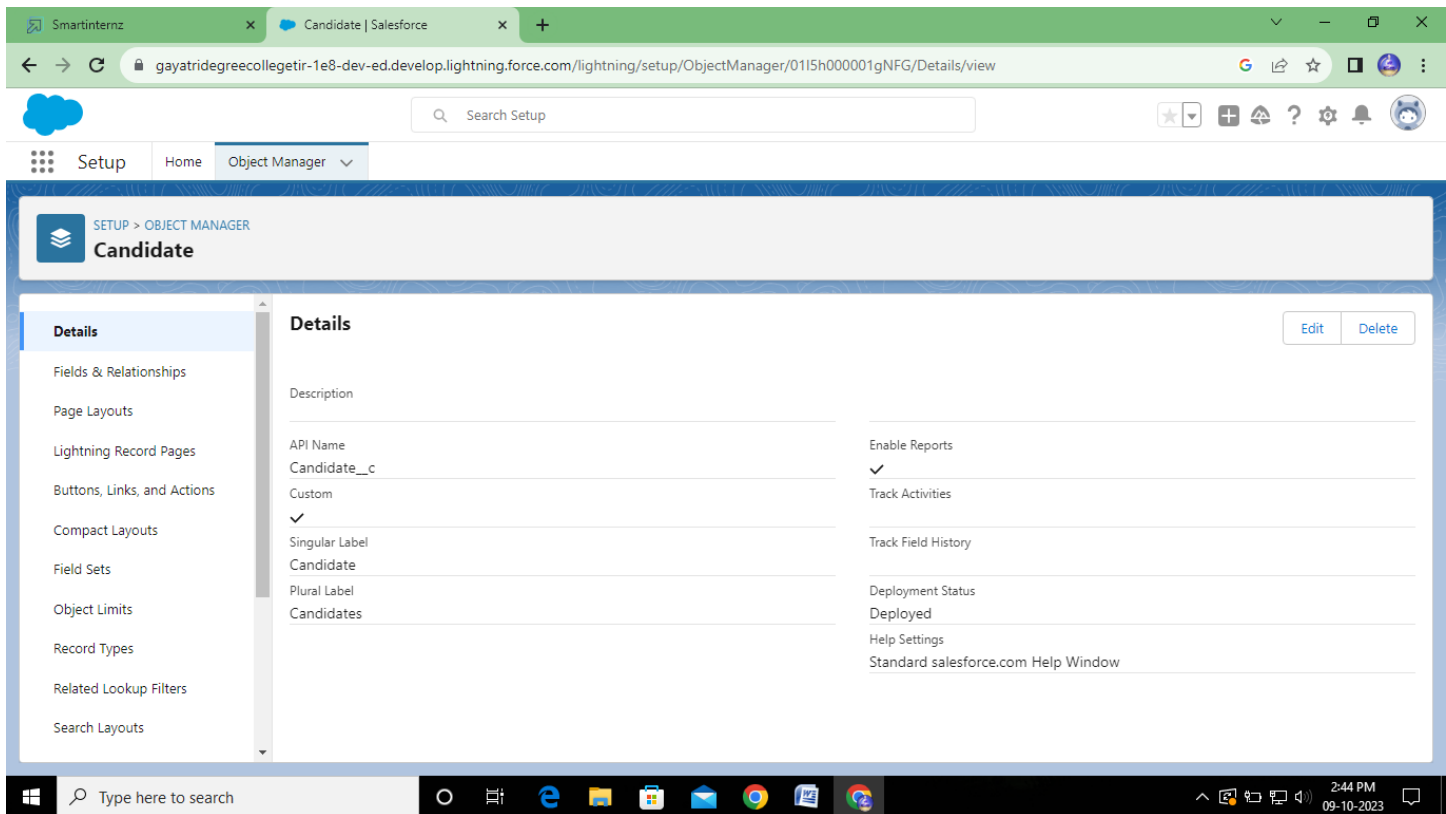
Object – Semester:

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.



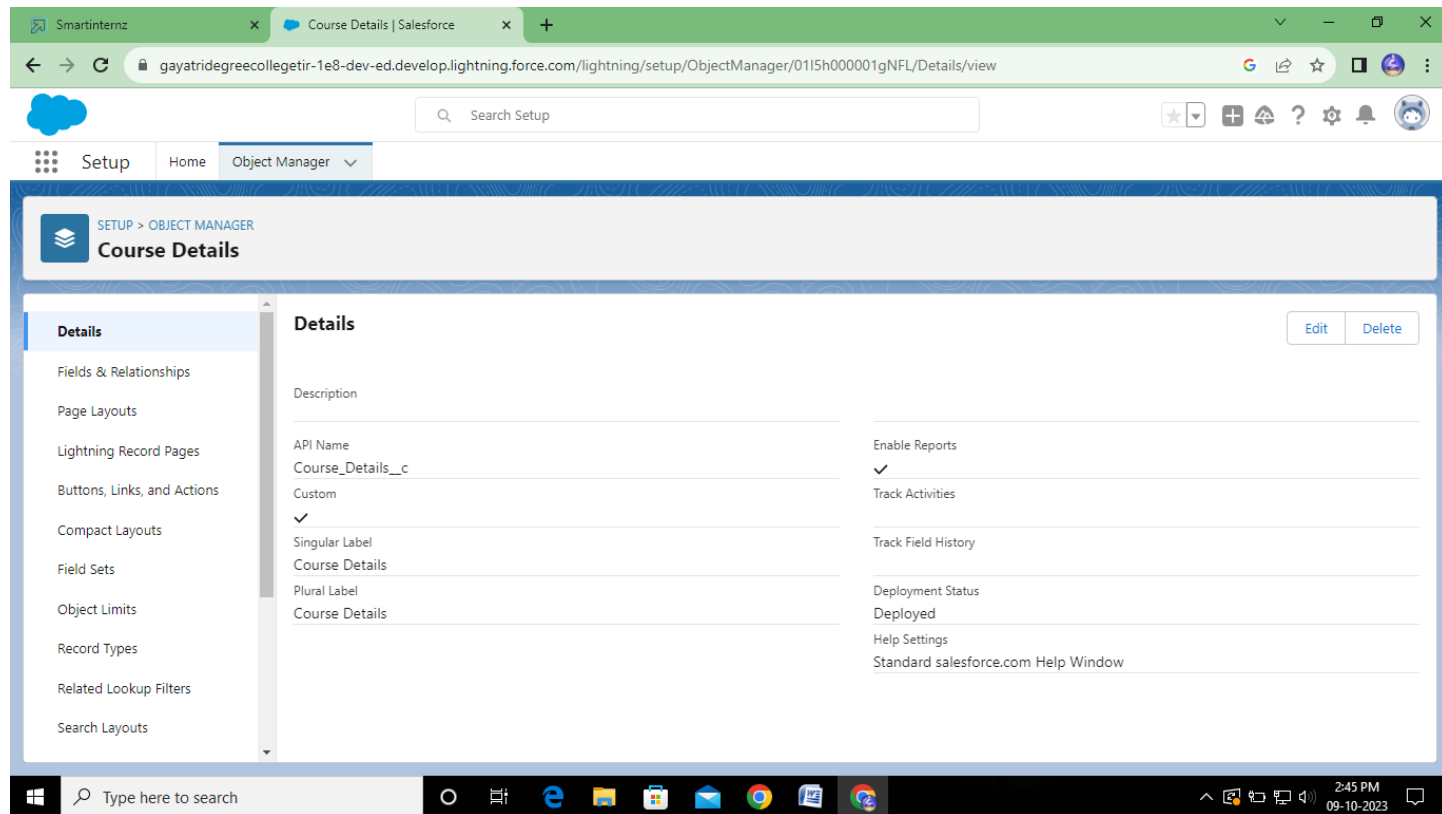
Object- Candidate

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.



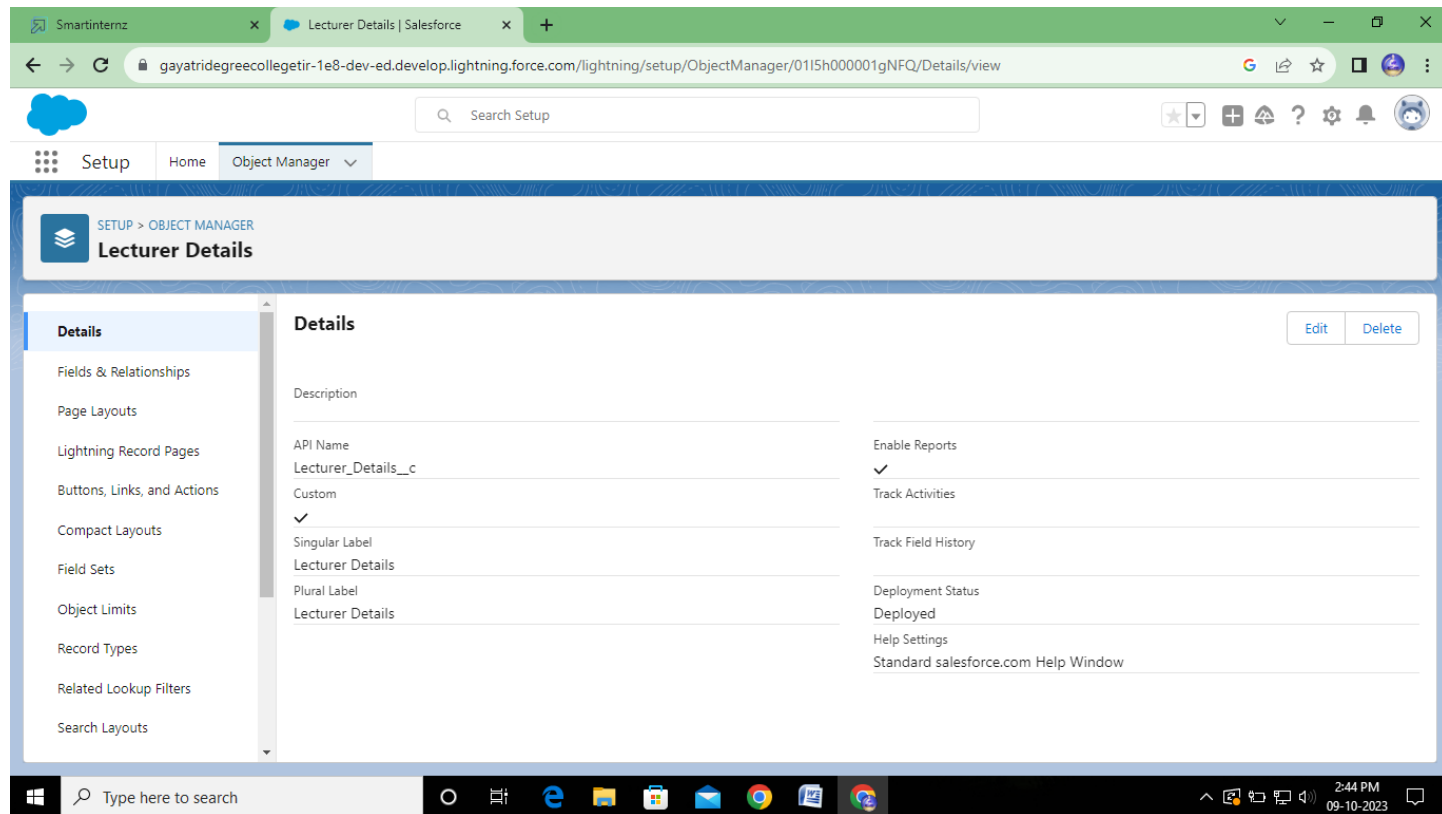
Object - Course Details

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.



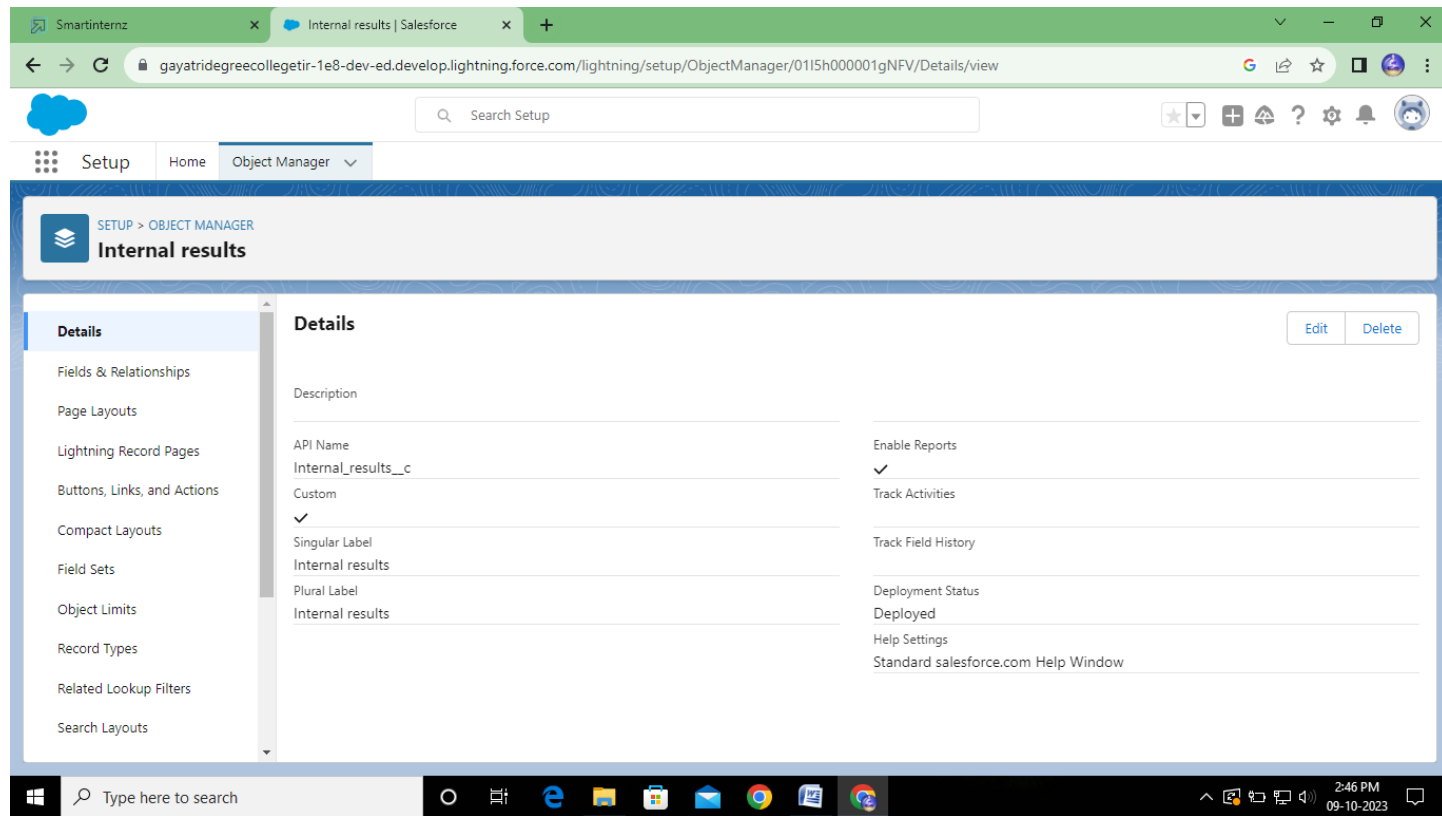
Object - Lecturer Details

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.

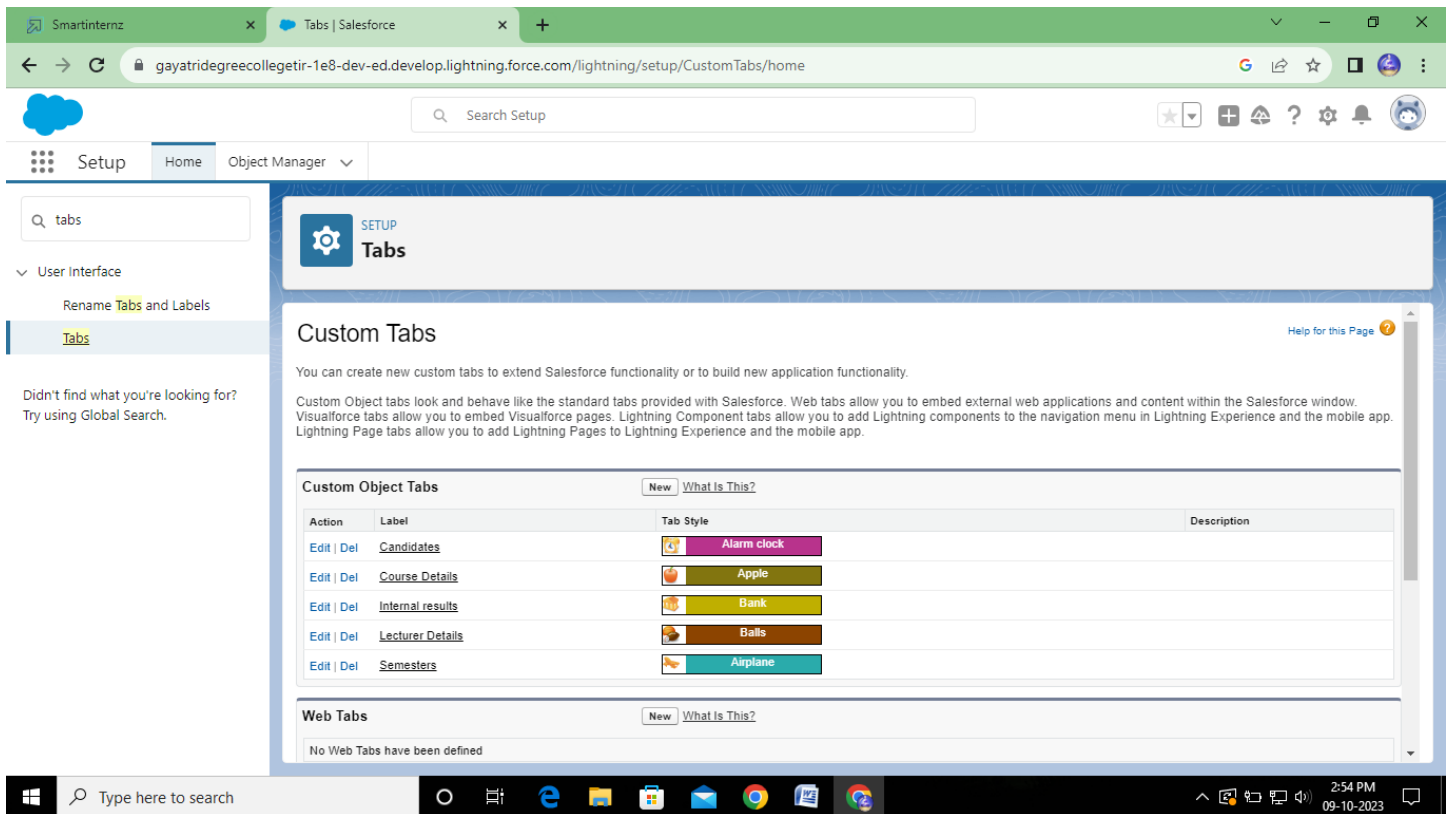


Milestone – 03: what Is A Tab?

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**

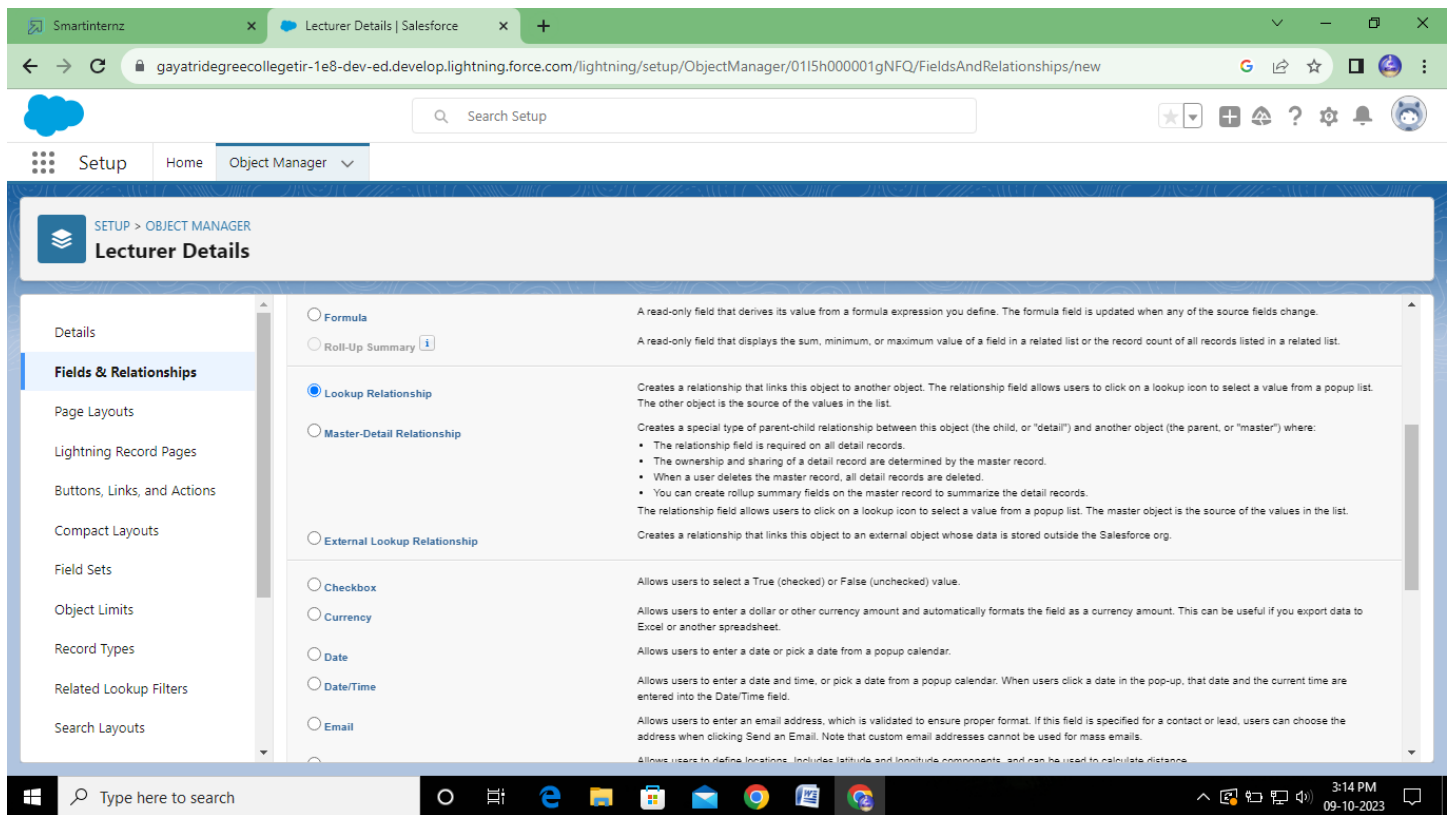
| Object Name | Field Name | Data type |
|------------------|-----------------------|--------------------------------------|
| Semester | Semester Name | Text(Standard field) |
| | Course | Lookup(Course Details) |
| Candidate | Candidate Name | Text(Standard field) |
| | Candidate Roll Number | Auto 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.

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: `gayatridgeecollegeltr-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'Object Manager' and shows a list of objects. The table below lists the objects:

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

The table has a search bar at the top right with the text 'led'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 3:18 PM on 09-10-2023.

SETUP > OBJECT MANAGER

Lecturer Details

Details

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 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 Users | Salesforce x +

gayatridgecollegetir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

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

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 | Chatter Expert | Chatter | chatty.00d5h000008jvu5eam_idl@plobknq@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | SIVADEEP JANAGANI | JSIVA | sivadeepsivadeep595@9dcproject.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | Teacher Class | cleac | sivadeepsivadeep595@2023gmail.com | | ✓ | Standard User |
| <input type="checkbox"/> Edit | User Integration | integ | integration@00d5h000008jvu5eam.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightssecurity@00d5h000008jvu5eam.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

https://gayatridgecollegetir-1e8-dev-ed.develop.lightning.force.com/one/app#/setup/ManageUsers/home

Type here to search

3:28 PM 09-10-2023

Smartinternz x Users | Salesforce x +

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

Search Setup

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

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

Force.com - App Subscription

Force.com - App Subscription 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.

The screenshot shows the Salesforce Object Manager interface. The browser address bar indicates the URL: `gayatridegreecollegitir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The interface includes a search bar at the top with the text "Search Setup". Below the search bar, there are tabs for "Setup", "Home", and "Object Manager". The "Object Manager" tab is active, and a search dropdown is open, showing the search results for "cand". The search results are categorized under "Apps" and "Items". Under "Apps", the "Candidate Internal Result Card" app is listed. Under "Items", the "Candidate App page" and "Candidates" are listed. The "Candidates" item is selected, and a list of objects is displayed. The list has columns for "API NAME", "TYPE", "DESCRIPTION", "LAST MODIFIED", and "DEPLOYED". The objects listed are:

| 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 Recently Viewed | Course Details x +

gayatrigreecollegedir-1e8-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

4 items • Updated a few seconds ago

New Import Change Owner

Search this list...

| | <input type="checkbox"/> Course Details Name | |
|---|--|--|
| 1 | <input type="checkbox"/> MBA | |
| 2 | <input type="checkbox"/> BCA | |
| 3 | <input type="checkbox"/> Btech | |
| 4 | <input type="checkbox"/> BSc | |

https://gayatrigreecollegedir-1e8-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/home

Type here to search

3:39 PM 09-10-2023

Smartinternz x New Course Details | Salesforce x +

gayatrigreecollegedir-1e8-dev-ed.develop.lightning.force.com/lightning/o/Course_Details__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigation...

Search...

Candidate Internal ...

Course Details Recently Viewed

4 items • Updated a few seconds ago

New Import Change Owner

Search this list...

New Course Details

* = Required Information

Information

* Course Details Name

Owner

JANAGANI SIVADEEP

Duration

Duration (Years)

Course Name

Cancel Save & New Save

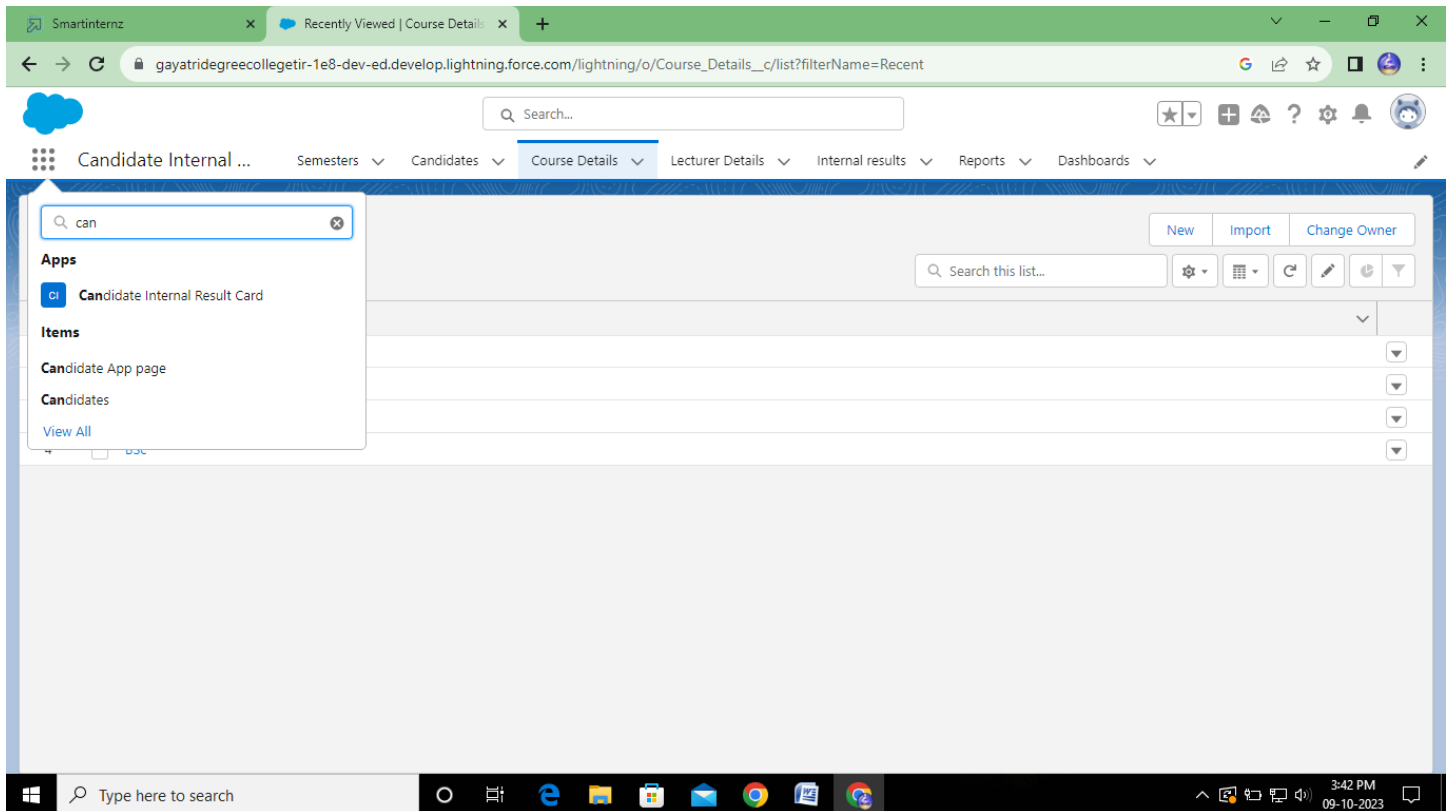
Type here to search

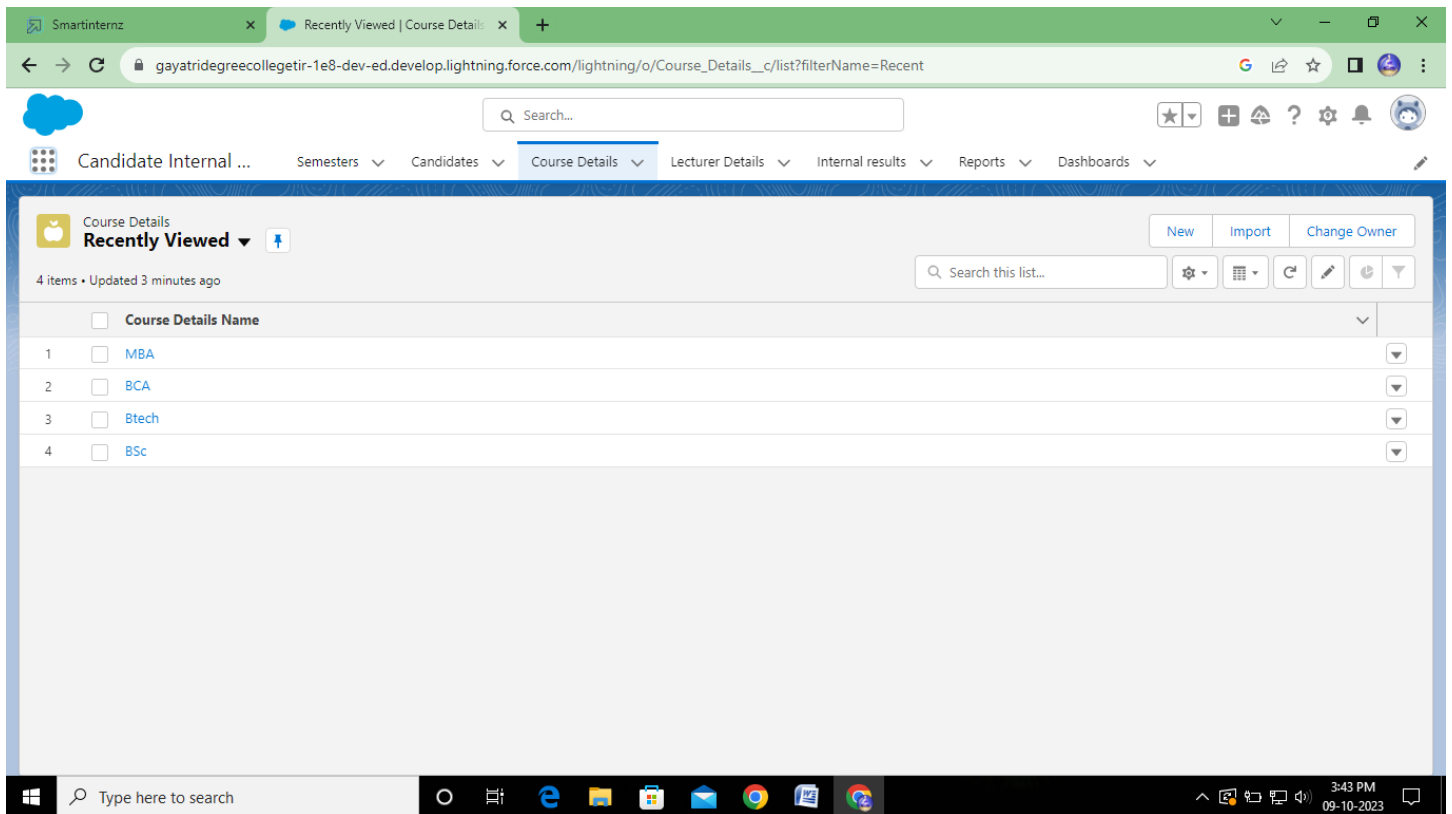
3:40 PM 09-10-2023

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





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 Recently Viewed | Course Details x

gayatridegreecollegetir-1e8-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

can

Apps

- Candidate Internal Result Card

Items

- Candidate App page

Candidates

View All

New Import Change Owner

Search this list...

Type here to search

3:42 PM 09-10-2023

Smartinternz x Recently Viewed | Course Details x

gayatridegreecollegetir-1e8-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

4 items • Updated 3 minutes ago

New Import Change Owner

Search this list...

| | <input type="checkbox"/> Course Details Name | |
|---|--|--|
| 1 | <input type="checkbox"/> MBA | |
| 2 | <input type="checkbox"/> BCA | |
| 3 | <input type="checkbox"/> Btech | |
| 4 | <input type="checkbox"/> BSc | |

Type here to search

3:43 PM 09-10-2023

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 customobjects 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 iscreated, 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 themto/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 Home | Salesforce x New tab

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

Search Setup

Setup Home Object Manager

Search

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

Type here to search

9:17 AM 12-10-2023

Smartinternz x Reports | Salesforce x Reports | Salesforce x

gayatridgecollegetir161-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, 7:41 pm | |
| Created by Me | Candidate Internal Result Report | | Private Reports | CHARAN KUMAR M | 11/10/2023, 8:05 pm | |

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Type here to search

9:21 AM 12-10-2023

- . 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.

The screenshot displays the Salesforce Report Builder interface. The top navigation bar includes tabs for 'Smartinternz', 'Reports | Salesforce', and 'Report Builder | Salesforce'. The main header shows the report title 'Candidate Internal Result Report' and a filter 'Semesters with Course'. The left sidebar contains 'Outline', 'Filters', 'Groups', 'Columns', and 'Fields'. The main area shows a table with columns: Course: Course Name, Semester: Semester Name, Course: Course Deatils, and Duration. The table lists various courses and semesters, including BCA (1), BSC (3), BTECH (2), and MBA (1), with their respective semesters and durations. The bottom status bar shows 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

| Course: Course Name | Semester: Semester Name | Course: Course Deatils | Duration |
|---------------------|-------------------------|------------------------|---------------|
| BCA (1) | SEM 5 | BCA (DATA SCIENCE) | Small Course |
| Subtotal | | | |
| BSC (3) | SEM 1 | BSC (COMPUTER SCIENCE) | Medium Course |
| | SEM 4 | BSC (NURSING) | Medium Course |
| | SEM 7 | BSC (AGRICULTURE) | Medium Course |
| Subtotal | | | |
| BTECH (2) | SEM 2 | BTECH (AUTOMOBILE) | Large Course |
| | SEM 3 | BTECH (MECHANICAL) | Large Course |
| Subtotal | | | |
| MBA (1) | SEM 6 | MBA (FINANCE) | Large Course |
| Subtotal | | | |
| Total (7) | | | |

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.

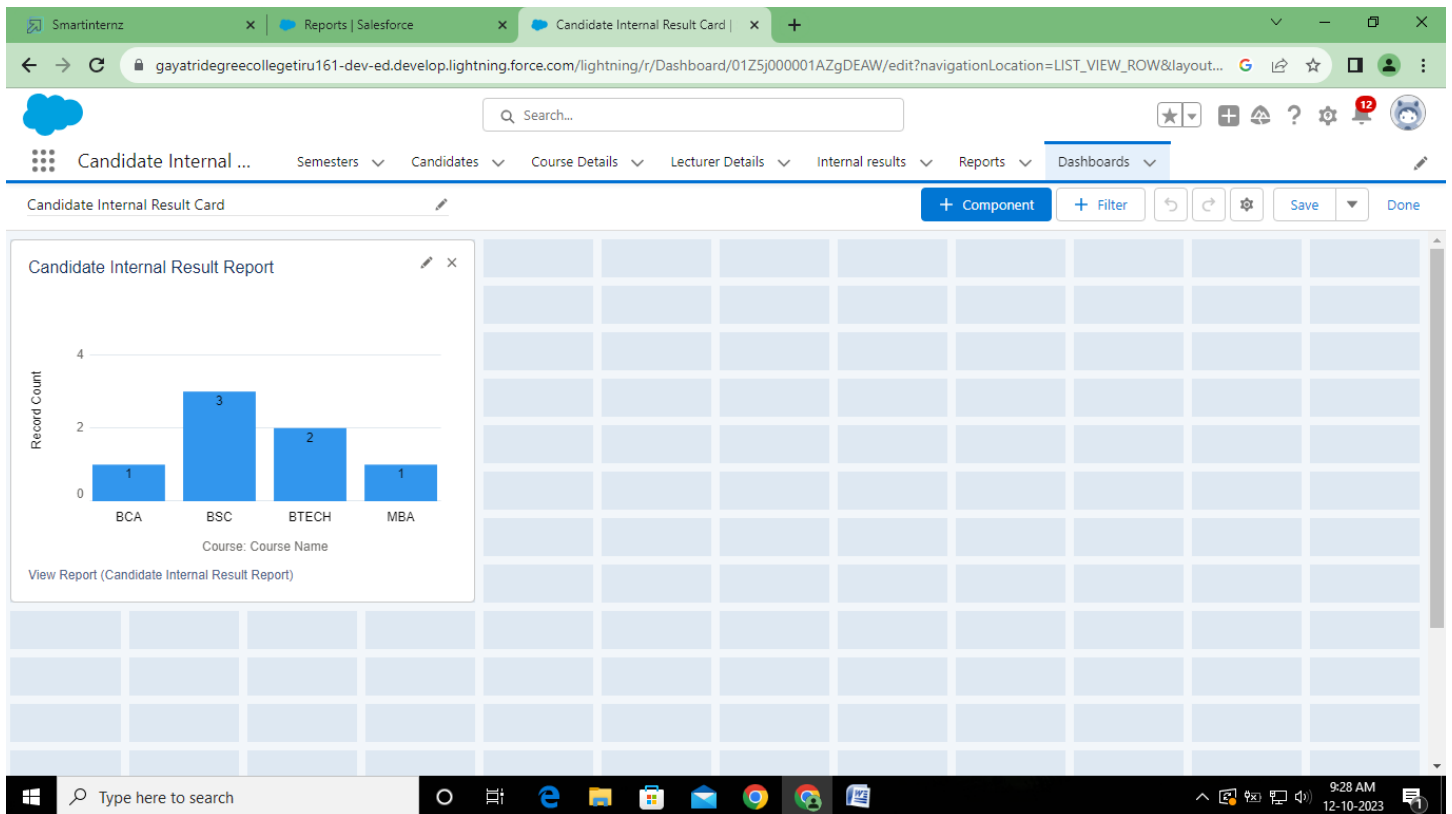
The screenshot shows the Salesforce Dashboards page. The top navigation bar includes tabs for 'Smartinternz', 'Reports | Salesforce', and 'Dashboards | Salesforce'. The URL bar shows a development instance of Salesforce. The left sidebar contains a navigation menu with 'Candidate Internal ...' selected. The main content area displays the 'Dashboards' section with a 'Recent' filter applied. A table lists the recent dashboard:

| DASHBOARDS | Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|------------|--------------------------------|-------------|--------------------|----------------|---------------------|------------|
| Recent | Candidate Internal Result Card | | Private Dashboards | CHARAN KUMAR M | 11/10/2023, 8:06 pm | |

The left sidebar also includes sections for 'FOLDERS' (All Folders, Created by Me, Shared with Me) and '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.

Smartinternz x Reports | Salesforce x Flows | Salesforce x +

gayatridgecollegetiru161-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 Modified... | Last Modified ... |
|---------------------------------------|----------------------------|-------------------------------------|-------------------------------------|-------------------|----------------|----------------------|-------------------|
| Basic Approval Request | Flow Orchestration for CMS | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Book Appointment from Invitation | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Cancel Item Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Candidate flow | Screen Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Unmanaged | CHARAN KUMAR M | 09/10/2023, 12:12 pm | |
| Change Case Owner to Incident Own... | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Close Change Request & Related Iss... | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Check Whether Any Step is Co... | Evaluation Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Notify Content Author | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Review Content | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| CMS: Submit Content for Review | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |

https://gayatridgecollegetiru161-dev-ed.develop.lightning.force.com/one/one.ap...

Type here to search

9:34 AM 12-10-2023

Smartinternz x Reports | Salesforce x Flows | Salesforce x Candidate flow - V1 x +

gayatridgecollegetiru161-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

Type here to search

9:35 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.

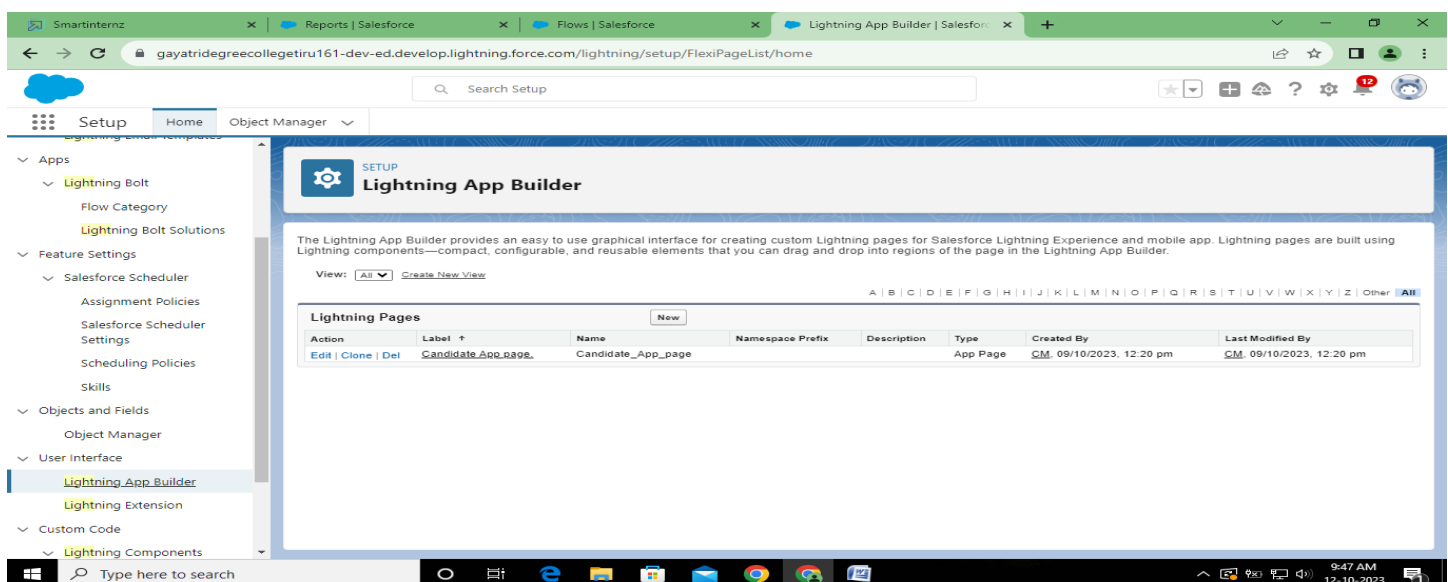
Label Name: Candidate App page.

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.

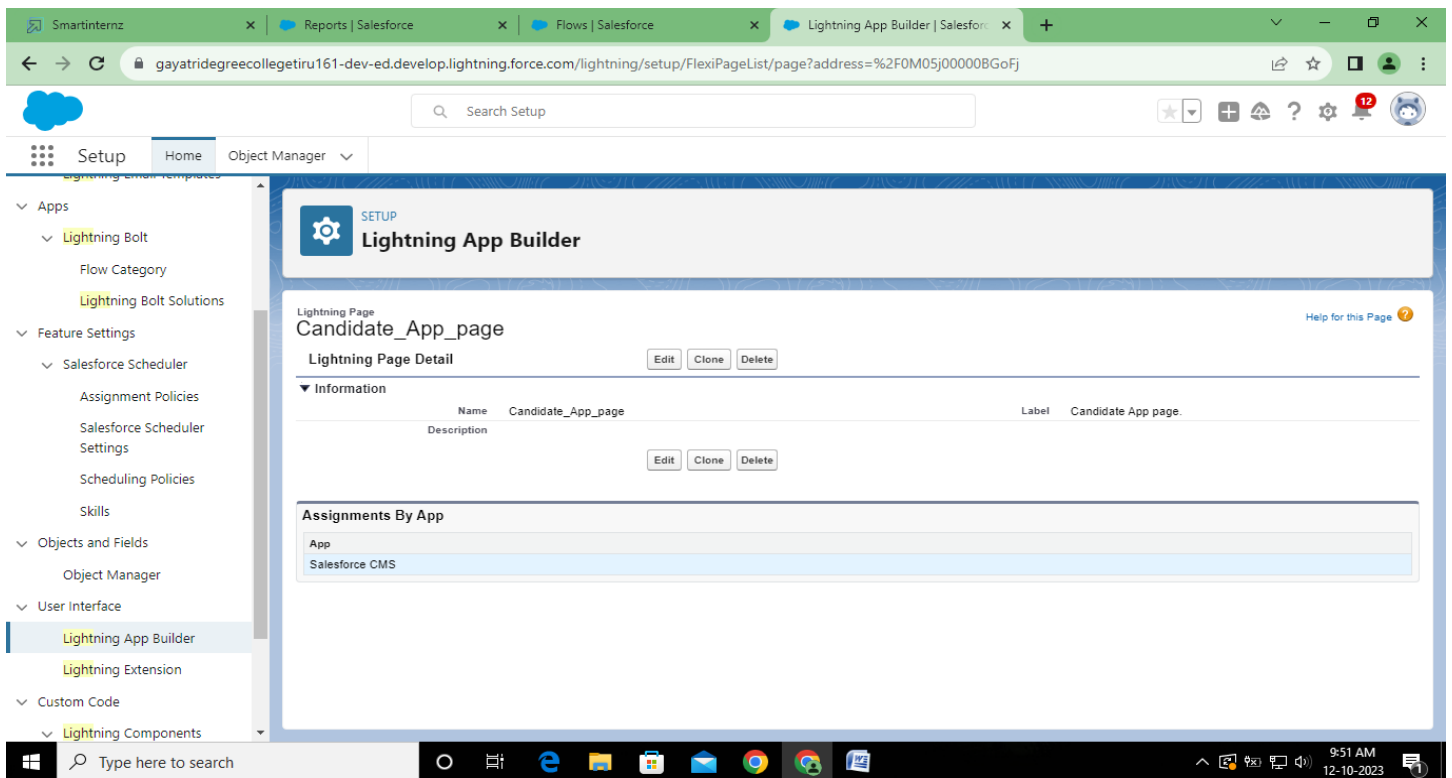
8. After dragging the component, give the flow label in the flow search and then click on save and then click on activate. Flow label: Candidate flow

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.



The screenshot shows the Salesforce Lightning App Builder interface. The left sidebar contains a navigation menu with options like 'Apps', 'Lightning Bolt', 'Feature Settings', 'Salesforce Scheduler', 'Objects and Fields', 'User Interface', 'Lightning App Builder', 'Lightning Extension', 'Custom Code', and 'Lightning Components'. The main content area displays the 'Lightning Pages' table, which lists the following page:

| 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 |



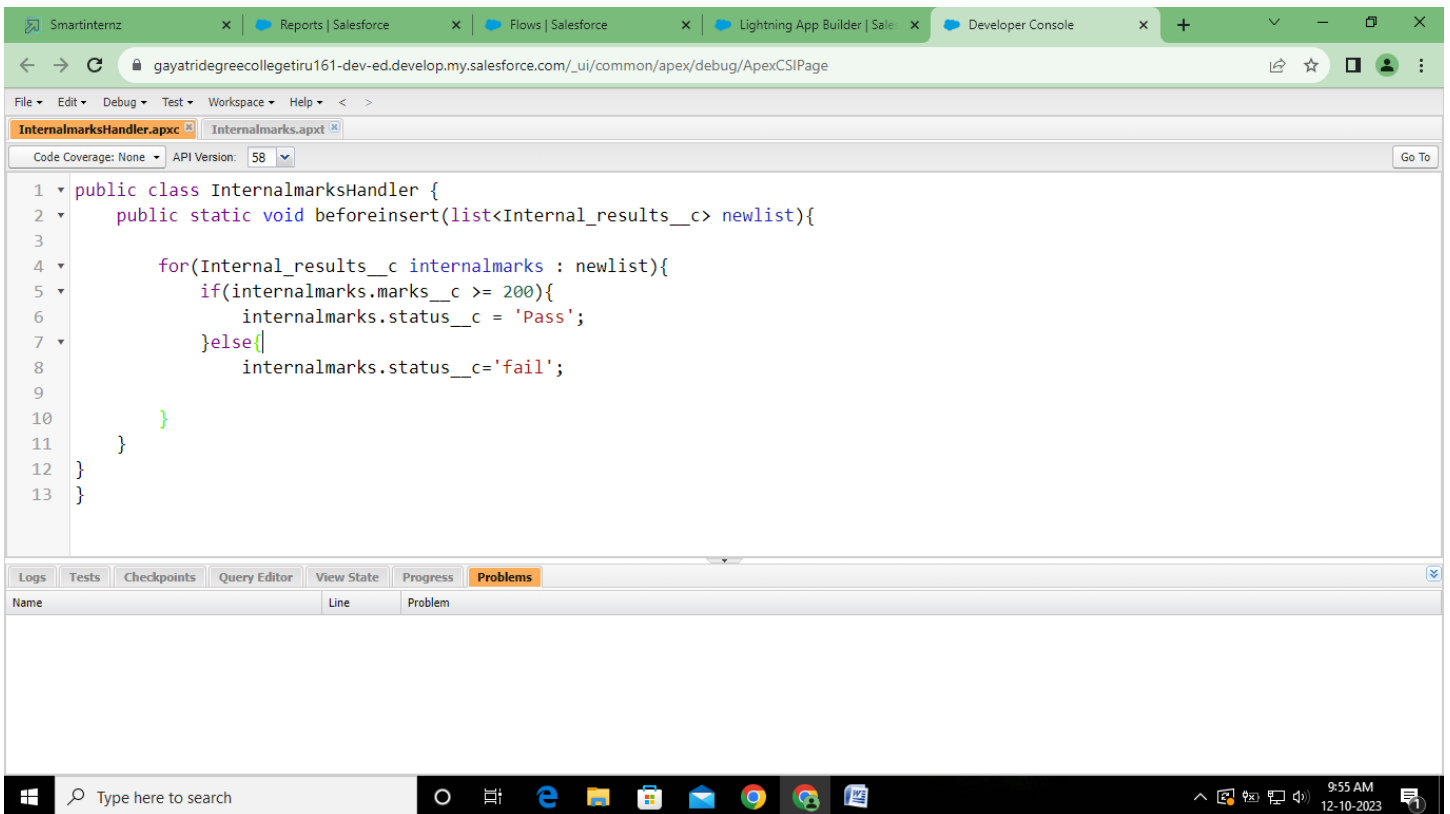
Milestone – 12: Triggers

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



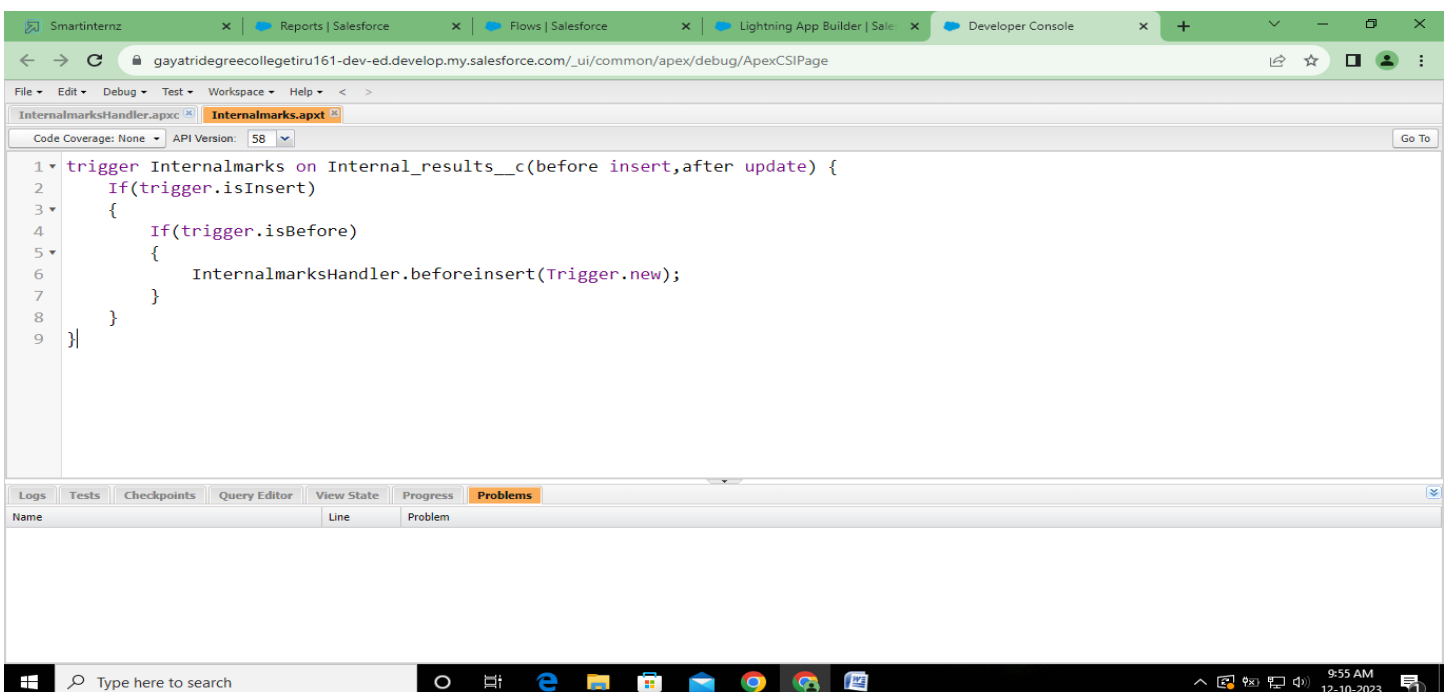
5. From the menu bar click on file and select Apex trigger.

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



OUTPUT:

The screenshot shows the 'New Internal results' form in the Salesforce Lightning App Builder. The form is titled 'New Internal results' and has a search bar at the top. The form fields are as follows:

- Internal results Name:** TEST TRIGGERS
- Candidate:** charan
- Course:** MBA
- Marks:** 300
- Status:** --None--

The form also shows the Owner as CHARAN KUMAR M. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

The screenshot shows the 'Internal results TEST TRIGGERS' record page in the Salesforce Lightning App Builder. The page has a green banner at the top that says 'Internal results "TEST TRIGGERS" was created.' The record details are as follows:

- Internal results Name:** TEST TRIGGERS
- Candidate:** charan
- Course:** MBA
- Candidate Roll Number:** 5
- Marks:** 300
- Status:** Pass

The page also shows the Owner as CHARAN KUMAR M. At the bottom, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'.

THE END