

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://developer.salesforce.com/signup)

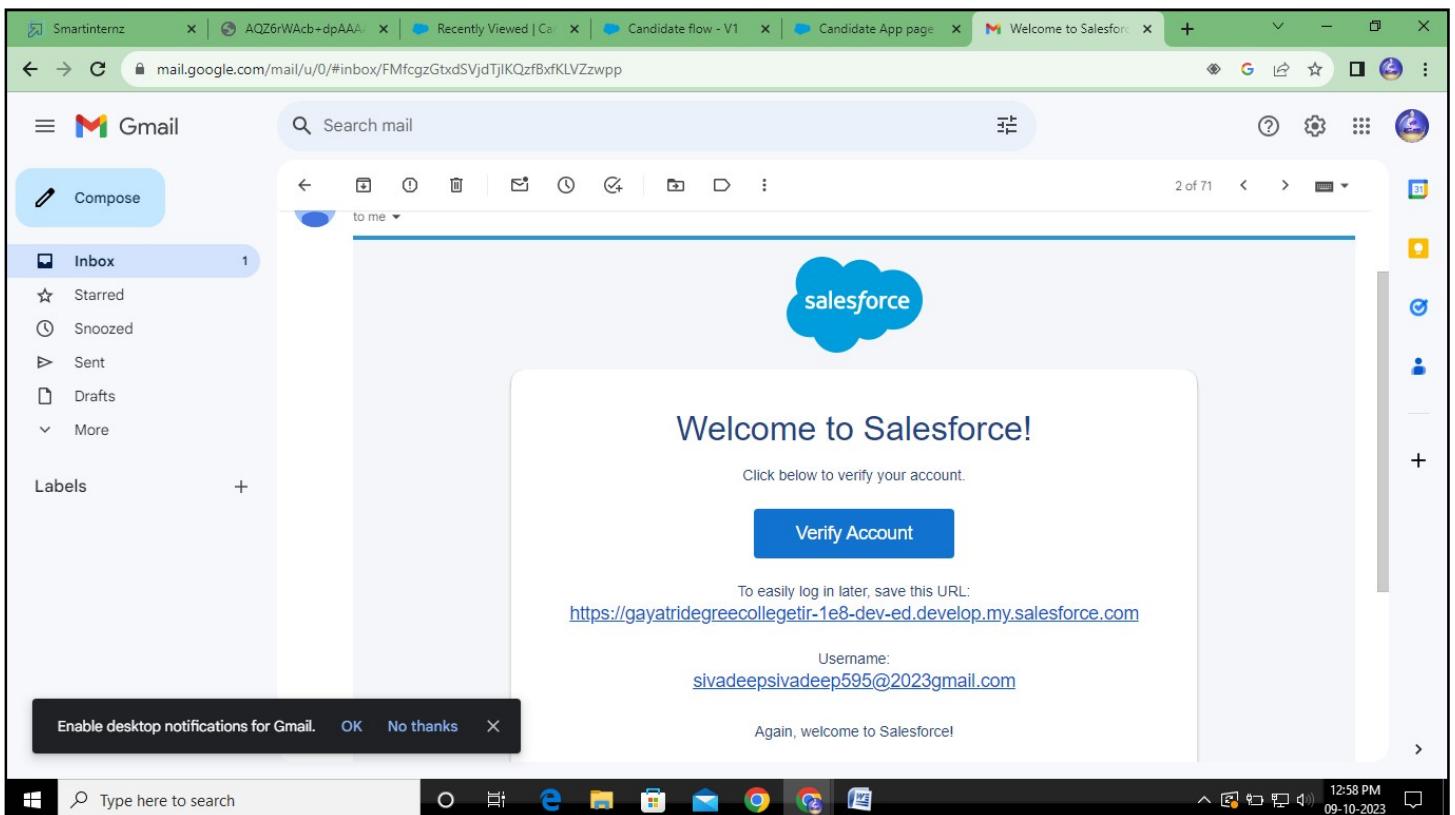
Click on sign up.

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

1. First name & Last name – JANAGANI & SIVADEEP
2. Email – sivadeepsivadeep595@gmail.com
3. Role: Developer
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: [sivadeepsivadeep595@gdcproject.com](mailto:sivadeepsivadeep595@gdcproject.com)

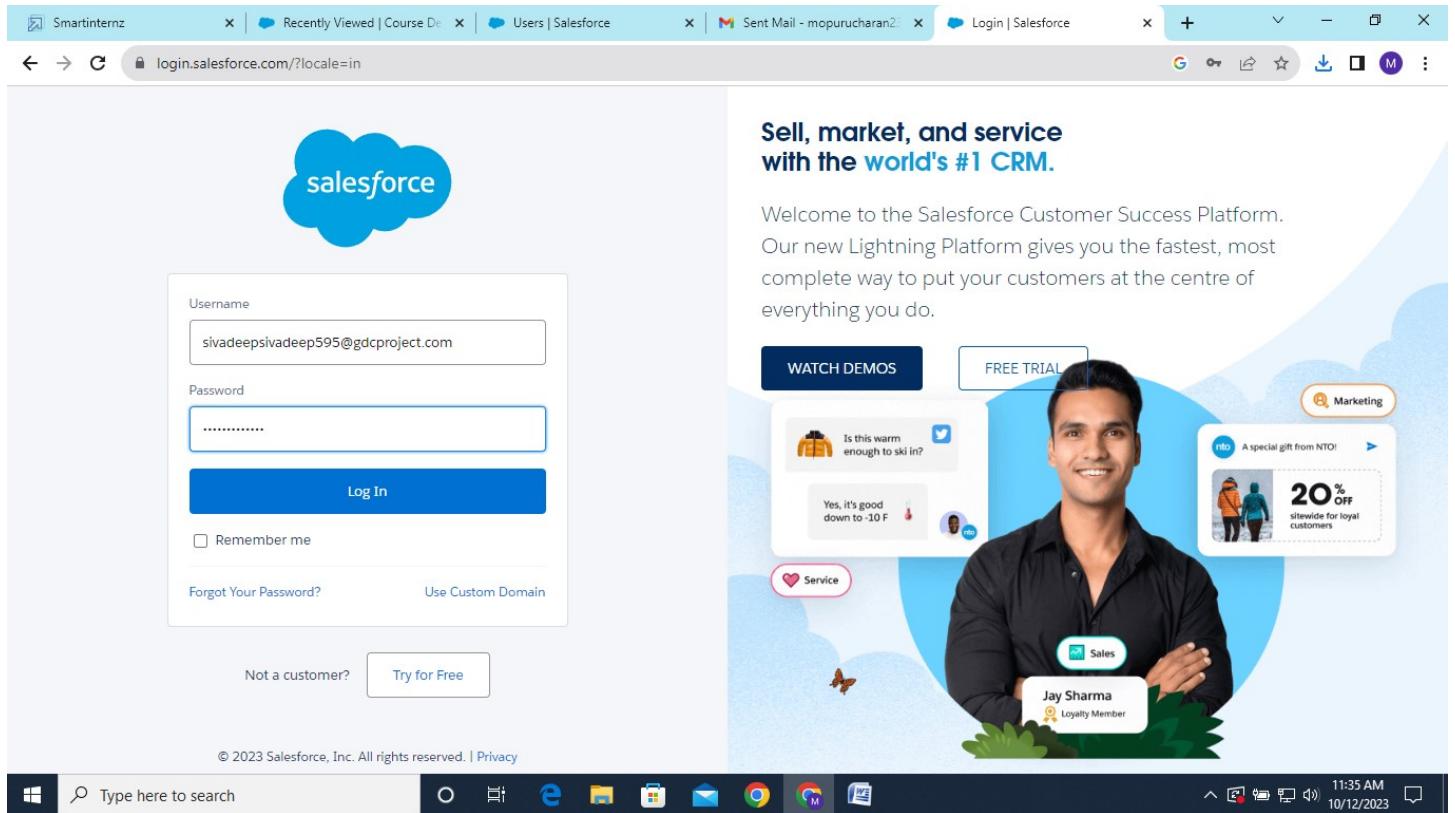
**Account Activation**

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 Dropdownclick 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.

The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes tabs like Smartinternz, AQZ6rWAcB+dp, Recently Viewed, Semester | Sales, Candidate flow, Candidate App, Login | Salesforce, and a plus sign for new items. The main header has a blue cloud icon, a search bar labeled 'Search Setup', and a gear icon. Below the header, the 'Object Manager' tab is selected. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' for the 'Semester' object. It shows the API Name as 'Semester\_\_c', which is marked as 'Custom'. The singular label is 'Semester' and the plural label is 'Semesters'. On the right, there are sections for 'Description', 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (linking to 'Standard salesforce.com Help Window'). At the bottom right of the content area are 'Edit' and 'Delete' buttons. The bottom of the screen shows the Windows taskbar with icons for File Explorer, Task View, Edge, File, Mail, Google Photos, Google Chrome, and Microsoft Word, along with a search bar and system status indicators.

## 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 Dropdownclick 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.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Smartinternz, Candidate | Salesforce, gayatridegreecollege-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5h000001gNFG/Details/view
- Top Bar:** Search Setup, Setup icon, Home, Object Manager tab.
- Breadcrumb:** SETUP > OBJECT MANAGER Candidate
- Left Sidebar (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
- Right Panel (Details):**

Setting	Value
Description	
API Name	Candidate__c
Custom	✓
Singular Label	Candidate
Plural Label	Candidates
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window
- Bottom Bar:** Type here to search, taskbar icons (File, Print, etc.), system tray showing 2:44 PM 09-10-2023.

## 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.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Smartinternz, Course Details | Salesforce, gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5h000001gNFL/Details/view
- Left Sidebar (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
- Central Content (Details):**

Description	
API Name	Course_Details__c
Singular Label	Course Details
Plural Label	Course Details
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window
- Bottom Navigation:** Type here to search, taskbar icons (File, Home, e-mail, etc.), and system status (2:45 PM, 09-10-2023).

## 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.

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are two tabs: 'Smartinternz' and 'Lecturer Details | Salesforce'. The URL in the address bar is 'gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000001gNFQ/Details/view'. Below the tabs, there's a header with a cloud icon, a search bar containing 'Search Setup', and various navigation icons. The main content area is titled 'Lecturer Details' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The right side shows the 'Details' tab for the 'Lecturer Details' object. It includes fields for 'Description', 'API Name' (set to 'Lecturer\_Details\_\_c'), 'Custom' (checked), 'Singular Label' (set to 'Lecturer Details'), 'Plural Label' (set to 'Lecturer Details'), 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), 'Help Settings', and 'Standard salesforce.com Help Window'. At the bottom, there are 'Edit' and 'Delete' buttons.

## 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 Dropdownclick 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.

The screenshot shows the Salesforce Setup interface with the title bar "Internal results | Salesforce". The URL in the address bar is "gayatridegreecollegeit-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000001gNFV/Details/view". The main content area is titled "Internal results" under "SETUP > OBJECT MANAGER". On the left, a sidebar lists various setup categories like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The right panel displays the "Details" for the "Internal results" object. It includes fields for Description, API Name (Internal\_results\_\_c), Singular Label (Internal results), Plural Label (Internal results), and various status and tracking settings. At the bottom, there's a Windows taskbar with a search bar and pinned icons for File Explorer, Edge, File, Mail, Google Chrome, and Microsoft Word.

## 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** .

Smartinternz X Tabs | Salesforce gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home

Cloud Search Setup

SETUP Tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit   Del	Candidates	Alarm clock	
Edit   Del	Course Details	Apple	
Edit   Del	Internal results	Bank	
Edit   Del	Lecturer Details	Balls	
Edit   Del	Semesters	Airplane	

Web Tabs

No Web Tabs have been defined

Type here to search

2:54 PM 09-10-2023

## 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.

Smartinternz Candidate Internal Result Card - gayatridgegreecollegetir-1e8-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u5h000003Xh4dAAC&retUrl=https%3A%2F%2Fgayatridgegree...

Lightning App Builder App Settings Candidate Internal Result Card

**App Details & Branding**

**App Details & Branding**

App Options Utility Items (Desktop Only) Navigation Items User Profiles

**App Details**

\* App Name Candidate Internal Result Card

\* Developer Name Candidate\_Internal\_Result\_Card

Description Enter a description...

**App Branding**

Image  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**

Smartinternz Candidate Internal Result Card - gayatridgegreecollegetir-1e8-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u5h000003Xh4dAAC&retUrl=https%3A%2F%2Fgayatridgegree...

Lightning App Builder App Settings Pages Candidate Internal Result Card

**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**

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

## 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.

Smartinternz Object Manager | Salesforce

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

Cloud Search Setup

Setup Home Object Manager

Object Manager

1 Items, Sorted by Label

Search Lect

Create Schema Builder

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

Type here to search

3:09 PM 09-10-2023

Smartinternz Lecturer Details | Salesforce

gayatridgegreecollegetir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i5h000001gNFQ/FieldsAndRelationships/view

Cloud Search Setup

Setup Home Object Manager

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	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Lecturer Details Name	Name	Text(80)		✓
Lecturer Role	Lecturer_Role__c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

3:12 PM 09-10-2023

## 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Smartinternz' (active), 'Lecturer Details | Salesforce', and a new tab indicator. Below the navigation is a search bar labeled 'Search Setup'. The main content area is titled 'SETUP > OBJECT MANAGER' and shows the 'Lecturer Details' object. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The 'Fields & Relationships' section contains a list of field types with descriptions:

- Formula**: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary**: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship** (selected): Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship**: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship**: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox**: Allows users to select a True (checked) or False (unchecked) value.
- Currency**: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date**: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time**: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email**: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Latitude**: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

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 a browser window with the title 'Object Manager | Salesforce'. The URL in the address bar is 'gayatridegreecollegefir-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home'. The page displays the 'Object Manager' section under 'SETUP'. A search bar at the top right contains the text 'led'. Below it, there is a 'Schema Builder' button and a 'Create' button. The main area shows a table with one item:

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

At the bottom of the screen, there is a Windows taskbar with a search bar containing 'Type here to search', several pinned application icons, and a system tray showing the date and time as '09-10-2023 3:18 PM'.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Smartinternz' and 'Lecturer Details | Salesforce'. The URL in the address bar is [gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000001gNFQ/FieldsAndRelationships/view](https://gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5h000001gNFQ/FieldsAndRelationships/view). The main content area is titled 'Lecturer Details' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The 'Fields & Relationships' section is selected and displays a table with six items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

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 enter **Candidate 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 gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Cloud Search Setup Object Manager

Search Setup

Setup Home Object Manager

users

All Users

Help for this Page ?

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"/>	<a href="#">Edit Chatter Expert</a>	Chatter	chatty_00d5h000008vu5eam.lidbglobknpg@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	<a href="#">Edit SIVADEEP JANAGANI</a>	JSIVA	sivadeepsivadeep595@gdcproject.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit Teacher_Class</a>	cteac	sivadeepsivadeep595@2023mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	<a href="#">Edit User_Integration</a>	integ	integration@00d5h000008vu5eam.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	<a href="#">Edit User_Security</a>	sec	insightssecurity@00d5h000008vu5eam.com	<input checked="" type="checkbox"/>	<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

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

Type here to search 3:28 PM 09-10-2023

Smartinternz X Users | Salesforce gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUser... G 🔍 ☆

Cloud Search Setup Object Manager

Search Setup

Setup Home Object Manager

users

New User

Help for this Page ?

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

User Edit Save Save & New Cancel

General Information

First Name  Role <None Specified>

Last Name  User License Force.com - App Subscription

Alias  Profile Force.com - App Subscription User

Email  Active

Username  Marketing User

Nickname  Offline User

Title  Knowledge User

Company  Flow User

Department  Service Cloud User

Division  Site.com Contributor User

Site.com Publisher User

WDC User

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

Type here to search 3:29 PM 09-10-2023

## 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. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar on the right contains the text 'cand'. Below the search bar, there is a 'Quick Find' button, a 'Schema Builder' button, and a 'Create' button. On the left, there is a sidebar titled 'Apps' which lists the 'Candidate Internal Result Card' app. The main area displays a table of objects with columns: PI NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table includes rows for 'Candidate App page', 'Candidates', 'View All', 'API Anomaly Event Store', 'Appointment Category', 'Appointment Invitation', 'Appointment Invitee', 'Appointment Topic Time Slot', 'Asset', 'Asset Action', and 'Asset Action Source'. The 'Asset Action Source' row is highlighted with a green background. The status bar at the bottom shows the URL 'force.com/lightning/app/06m5h000003Xh4dAAC', the time '3:39 PM', and the date '09-10-2023'.

PI NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Candidate App page	Standard Object			
Candidates	Standard Object			
View All	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    Recently Viewed | Course Details    Users | Salesforce    Sent Mail - mopurucharan2...    Login | Salesforce

gayatridegreecollegeitiru161-dev-ed.lightning.force.com/lightning/o/Course\_Details\_\_c/list?filterName=Recent

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for Smartinternz, Recently Viewed, Users, Sent Mail, and Login. The main area displays a list titled 'Recently Viewed' under 'Course Details'. The list contains 7 items, all labeled 'Course Name' with values: 1. MBA, 2. BSC, 3. BSC, 4. BCA, 5. BSC, 6. BTECH, and 7. BTECH. A search bar at the top right says 'Search this list...'. A toolbar at the bottom right includes buttons for New, Import, and Change Owner.

Smartinternz    New Course Details | Salesforce

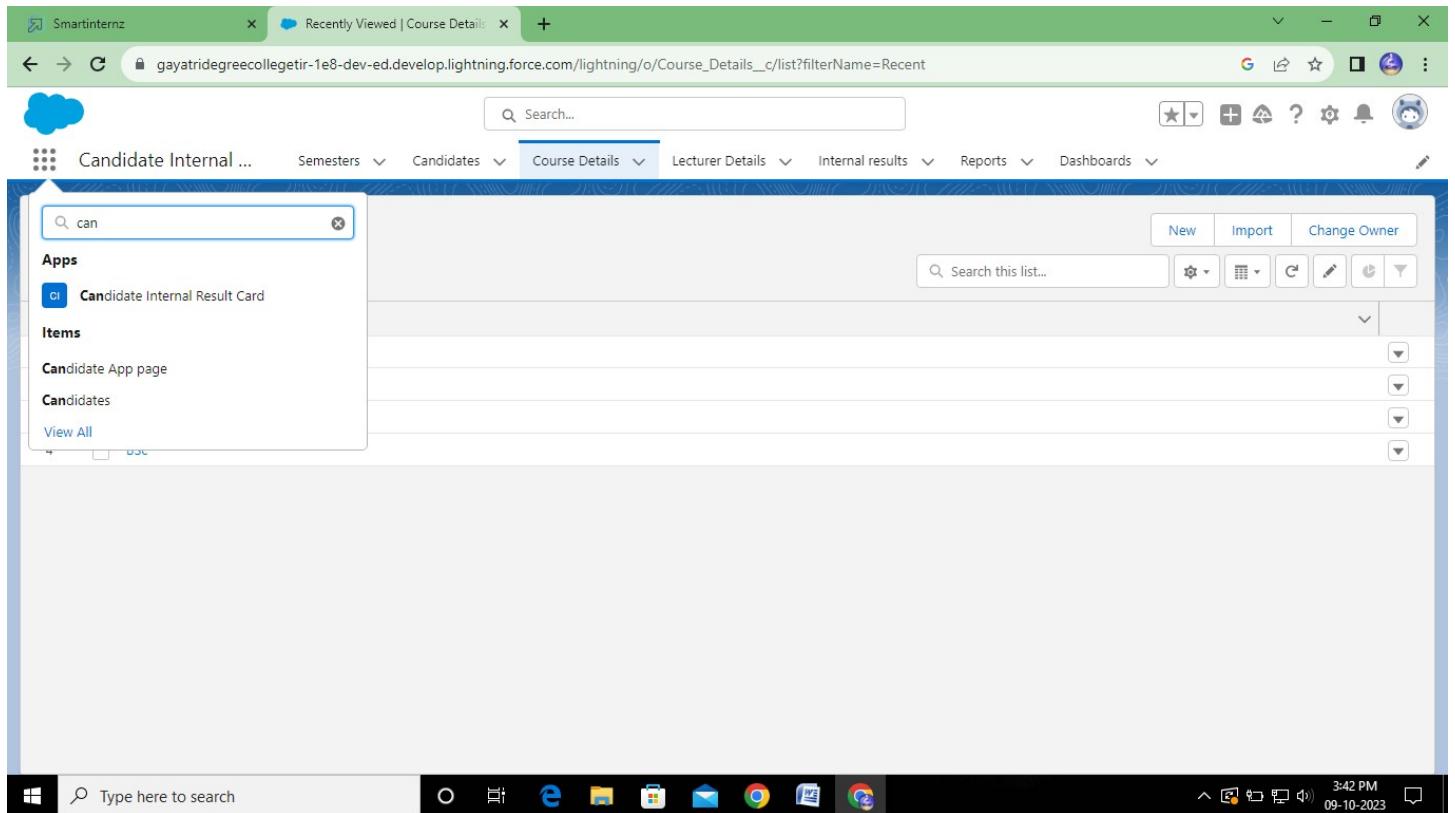
gayatridgegreecollegeitiru1e8-dev-ed.lightning.force.com/lightning/o/Course\_Details\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigation...

The screenshot shows the Salesforce Lightning interface with a modal dialog titled 'New Course Details'. The dialog is under the 'Information' tab. It contains fields for 'Course Details Name' (with a required indicator), 'Duration', 'Duration (Years)', and 'Course Name'. The 'Owner' field is populated with 'JANAGANI SIVADEEP'. At the bottom of the dialog are 'Cancel', 'Save & New', and 'Save' buttons. The background shows a list of recently viewed course details, identical to the one in the first screenshot.

## **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



Screenshot of a web browser showing a Salesforce Lightning interface for Course Details. The page displays a list of recently viewed courses:

Rank	Course Name
1	MBA
2	BSC
3	BSC
4	BCA
5	BSC
6	BTECH
7	BTECH

## 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 Recently Viewed | Course Details

gayatridegreecollegeiru161-dev-ed.develop.lightning.force.com/lightning/o/Course\_Details\_c/list?filterName=Recent

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

Search... 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 Recently Viewed | Course Details

Users | Salesforce Sent Mail - mopurucharan2 Login | Salesforce

gayatridegreecollegeiru161-dev-ed.develop.lightning.force.com/lightning/o/Course\_Details\_c/list?filterName=Recent

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

Course Details Recently Viewed

7 items • Updated 44 minutes ago

	Course Name
1	MBA
2	BSC
3	BSC
4	BCA
5	BSC
6	BTECH
7	BTECH

New Import Change Owner

Search this list...

Type here to search

11:41 AM 10/12/2023

## **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 is 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 Home | Salesforce x + New tab

Search Setup

Setup Home Object Manager

SETUP

SEARCH

cand

Apps Candidate Internal Result Card

Items Candidate App page Candidates View All

Assistant

Salesforce Mobile App Lightning Usage Optimizer

ADMINISTRATION

> Users > Data > Email

PLATFORM TOOLS

Subscription Management

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 +

Search...

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

Reports Recent 2 items

REPORTS Report Name Description Folder Created By Created On Subscribed

Recent

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, 7:41 pm

Private Reports Candidate Internal Result Report Private Reports CHARAN KUMAR M 11/10/2023, 8:05 pm

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

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.

The screenshot shows the Salesforce Report Builder interface. At the top, there are three tabs: 'Smartinternz', 'Reports | Salesforce', and 'Report Builder | Salesforce'. The current view is 'Report Builder | Salesforce'. The page title is 'Candidate Internal ...' and the URL is 'gayatridegreecollegeiru161-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXvncnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIj...'. The main content area displays a report titled 'Semesters with Course'. The report has an outline structure with 'Groups' and 'Columns'. The 'Groups' section includes 'Course: Course Name' (sorted by name), 'Semester: Semester Name' (sorted by name), 'Course: Course Details' (sorted by name), and 'Duration' (sorted by name). The 'Columns' section includes 'Course: Course Name', 'Semester: Semester Name', 'Course: Course Details', and 'Duration'. The report data is organized into several rows: BCA (1) with SEM 5, BCA (DATA SCIENCE) and Small Course; BSC (3) with SEM 1, SEM 4, SEM 7, BSC (COMPUTER SCIENCE), BSC (NURSING), and Medium Course; BTECH (2) with SEM 2, SEM 3, BTECH (AUTOMOBILE), and Large Course; and MBA (1) with SEM 6, MBA (FINANCE), and Large Course. A 'Subtotal' row is present between the BSC and BTECH sections. A 'Total (7)' row is at the bottom. At the bottom of the report, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'. The right side of the interface includes a search bar, navigation icons, and a toolbar with buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. There is also a 'Fields' sidebar on the left.

## Milestone – 09: Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, 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 a web browser window with three tabs open:

- Smartinternz
- Reports | Salesforce
- Dashboards | Salesforce

The current page is <https://gayatridegreecollegeiru161-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru>. The page title is "Candidate Internal ...".

The main content area displays a "Dashboards" section with the following navigation links:

- Recent
- 1 item
- DASHBOARDS
  - Recent
  - Created by Me
  - Private Dashboards
  - All Dashboards
- FOLDERS
  - All Folders
  - Created by Me
  - Shared with Me
- FAVORITES
  - All Favorites

A search bar at the top right says "Search recent dashboards...". Below it are buttons for "New Dashboard" and "New Folder".

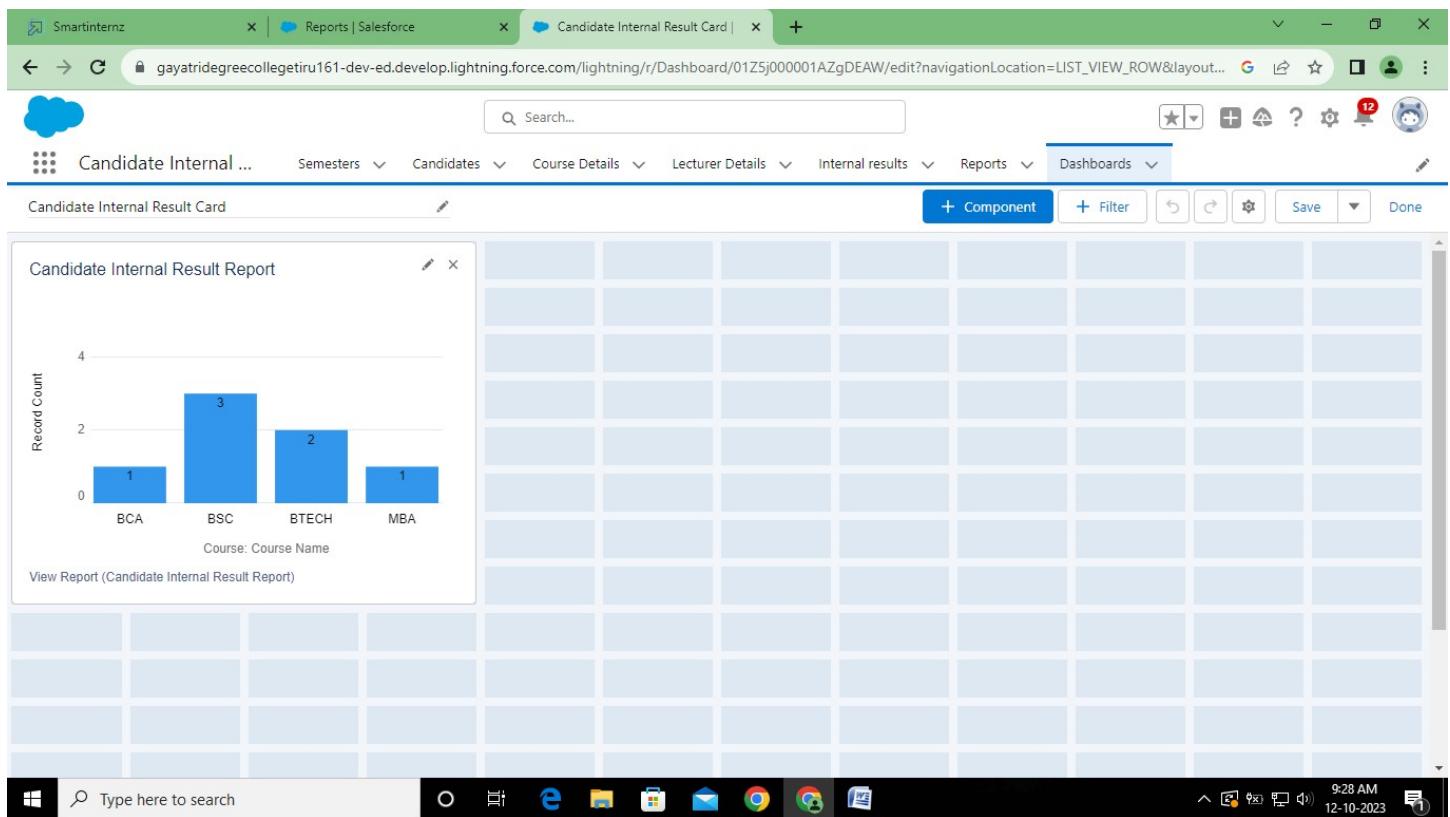
The "Recent" section contains one item:

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

The taskbar at the bottom of the screen includes icons for File, Home, Task View, Edge, File Explorer, Mail, Photos, Google Chrome, and Microsoft Edge. The system tray shows the date and time as 12-10-2023, 9:27 AM.

## 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 +

gayatridegreecollegeitiru161-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. The left sidebar has sections for 'Process Automation' (Flows, Identity, Login Flows) and a search bar. The main area displays a table of 'Flow Definitions' with columns for 'Flow Label', 'Process Type', 'A...', 'Te...', 'Package State', 'P...', 'Last Modified...', and 'Last Modified ...'. The table lists various flows like 'Basic Approval Request', 'Book Appointment from Invitation', etc., with details such as 'Managed-Installed' or 'Unmanaged' status and last modified by 'CHARAN KUMAR M' on '09/10/2023, 12:12 pm'.

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

gayatridegreecollegeitiru161-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app?flowId=3015j000001PhfAAS

Flow Builder Candidate flow - V1

The screenshot shows the Salesforce Flow Builder interface for a flow named 'Candidate flow - V1'. The top navigation bar includes 'Select Elements', 'Run', 'Debug', 'Deactivate', 'Save As', and 'Save'. The main area displays a 'Screen Flow' diagram with five steps: 'Start' (green play button), 'Candidate info Screen' (blue computer monitor icon), 'Create candidate Records' (pink plus sign icon), 'Send Email Action' (blue lightning bolt icon), and 'End' (red square icon). Below the diagram are buttons for deleting, duplicating, and adding elements. The status bar at the bottom indicates '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.

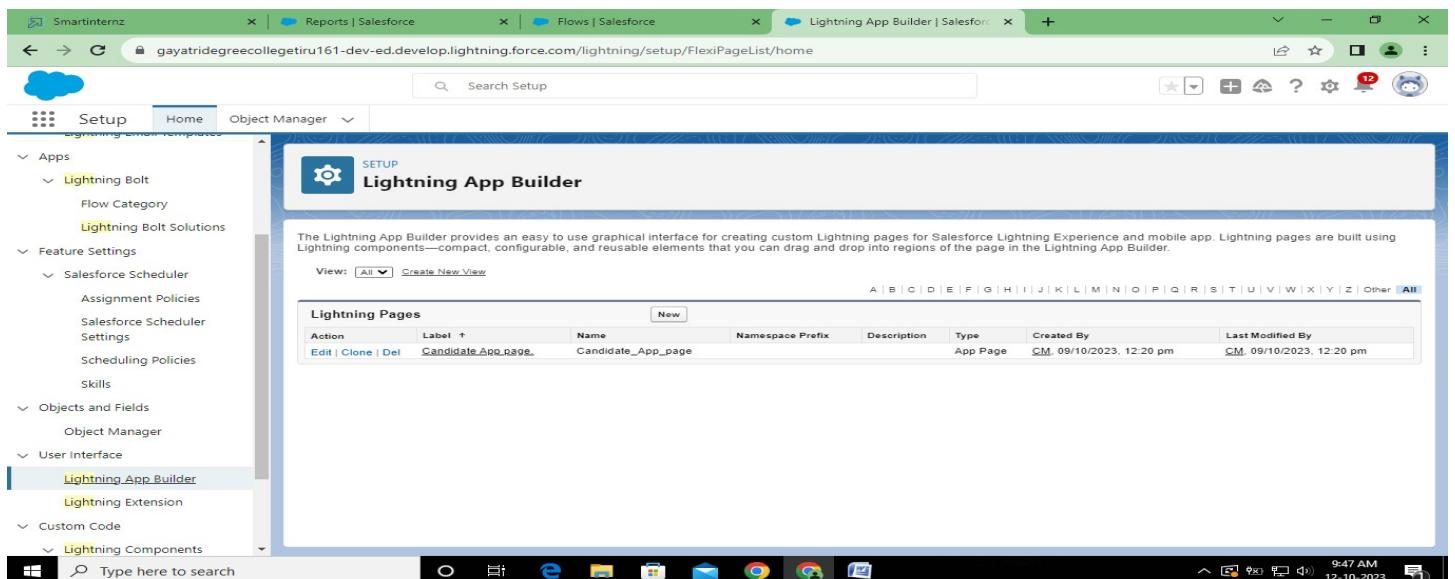
Label Name: Candidate App page.

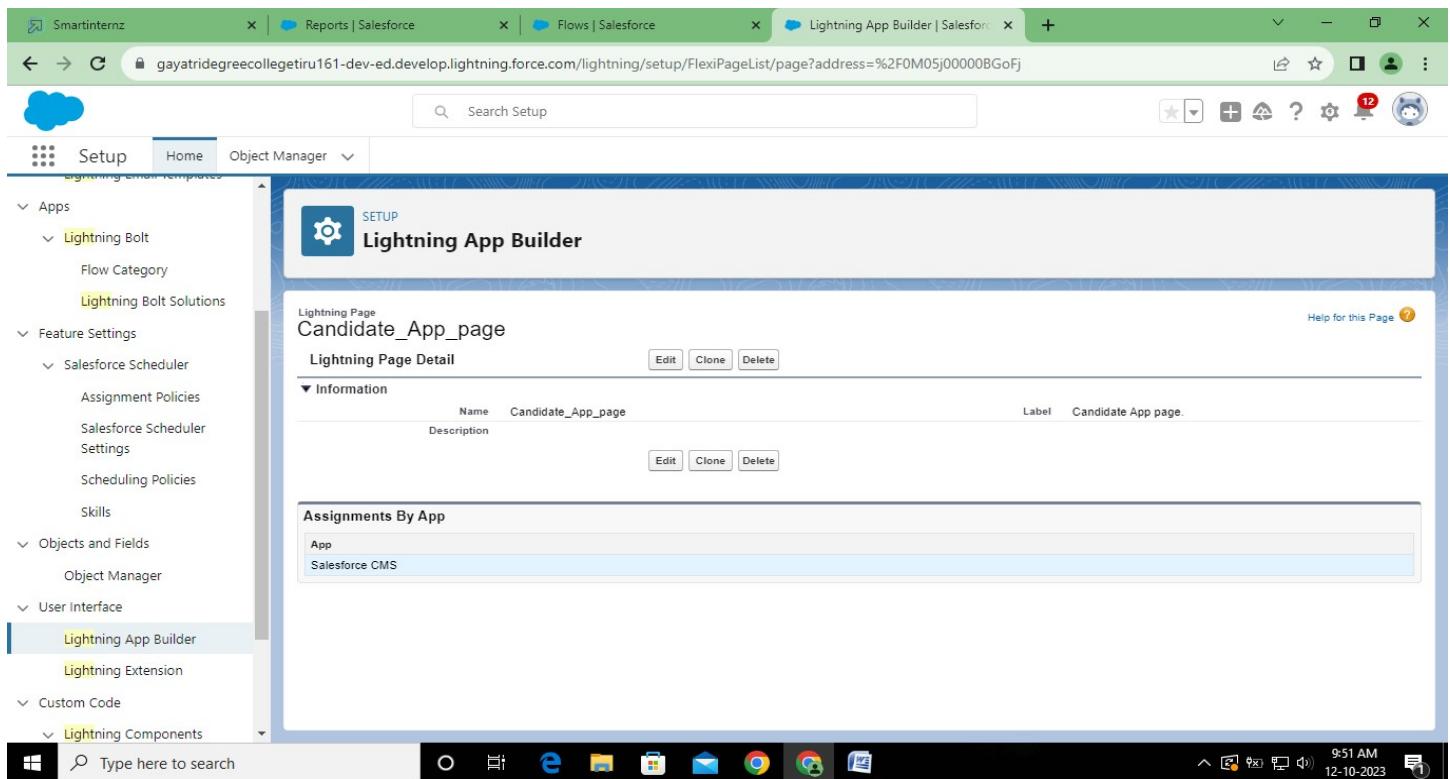
6. Select the one region and click on finish.

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.





## 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

The screenshot shows the Salesforce Developer Console interface. The top navigation bar has tabs for Smartinternz, Reports | Salesforce, Flows | Salesforce, Lightning App Builder | Sale, and Developer Console. The current tab is InternalmarksHandler.apxc. The code editor displays the following Apex class:

```
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 }
```

Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected. A table below the navigation bar lists problems, but it is currently empty.

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

The screenshot shows the Salesforce Developer Console interface. The top navigation bar has tabs for Smartinternz, Reports | Salesforce, Flows | Salesforce, Lightning App Builder | Sale, and Developer Console. The current tab is Internalmarks.apxt. The code editor displays the following Apex trigger:

```
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 }
```

Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected. A table below the navigation bar lists problems, but it is currently empty.

## OUTPUT:

The screenshot shows the Salesforce Lightning interface. A modal window titled "New Internal results" is open, prompting for information. The "Information" section contains the following fields:

- \* Internal results Name: TEST TRIGGERS
- Candidate: SIVADEEP
- Course: B.Sc (MECs)
- Marks: 300
- Status: --None--

The "Owner" field is populated with JANAGANI SIVADEEP. At the bottom of the modal are "Cancel", "Save & New", and "Save" buttons.

Below the modal, the main page displays a list of "Internal results" under the "Recently Viewed" tab. One item is selected: "TEST TRIGGERS". A success message at the top right of the page states: "Internal results TEST TRIGGERS was created." The page also includes tabs for "Semesters", "Candidates", "Course Details", "Lecturer Details", "Internal results" (which is active), "Reports", and "Dashboards".

THE END