

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)

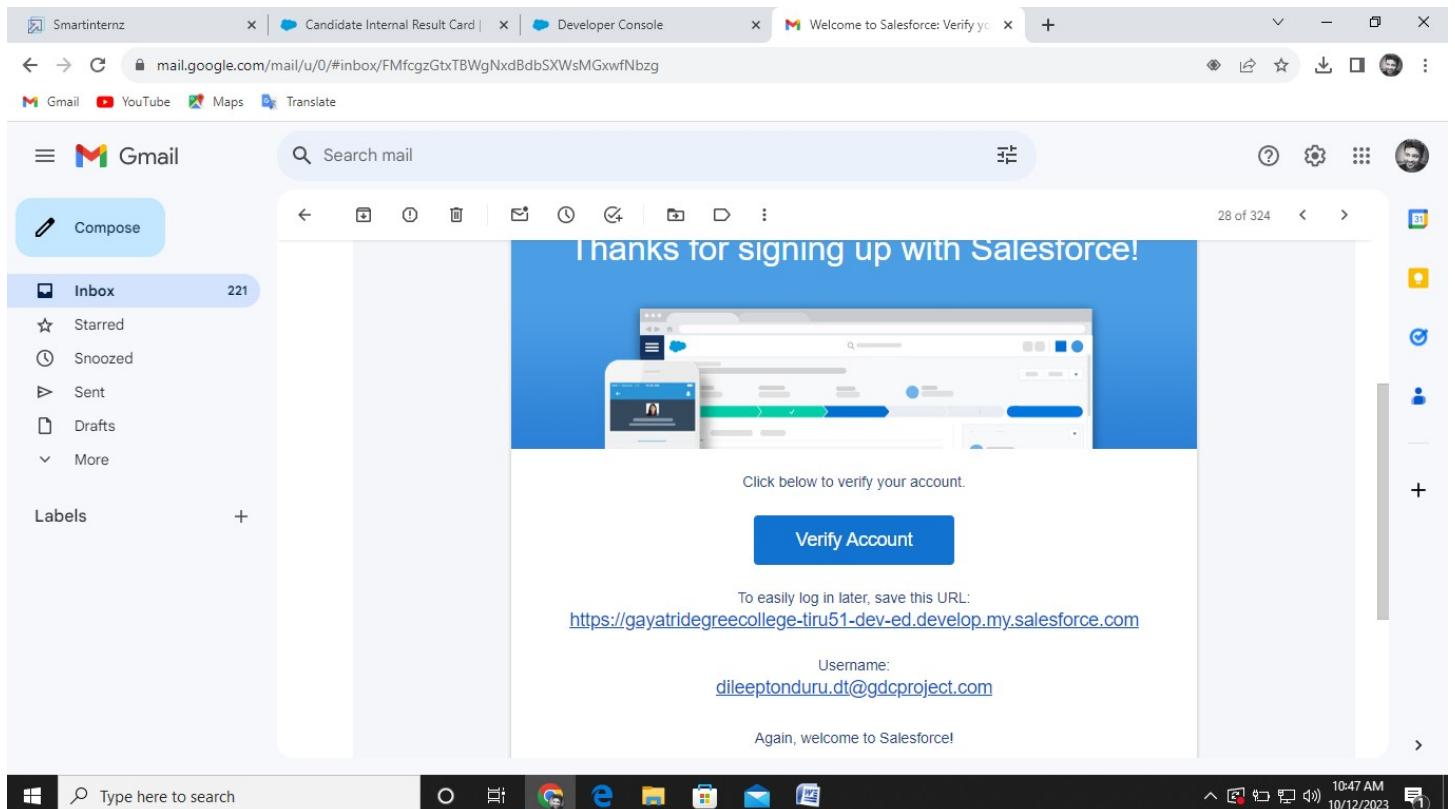
Click on sign up.

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

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

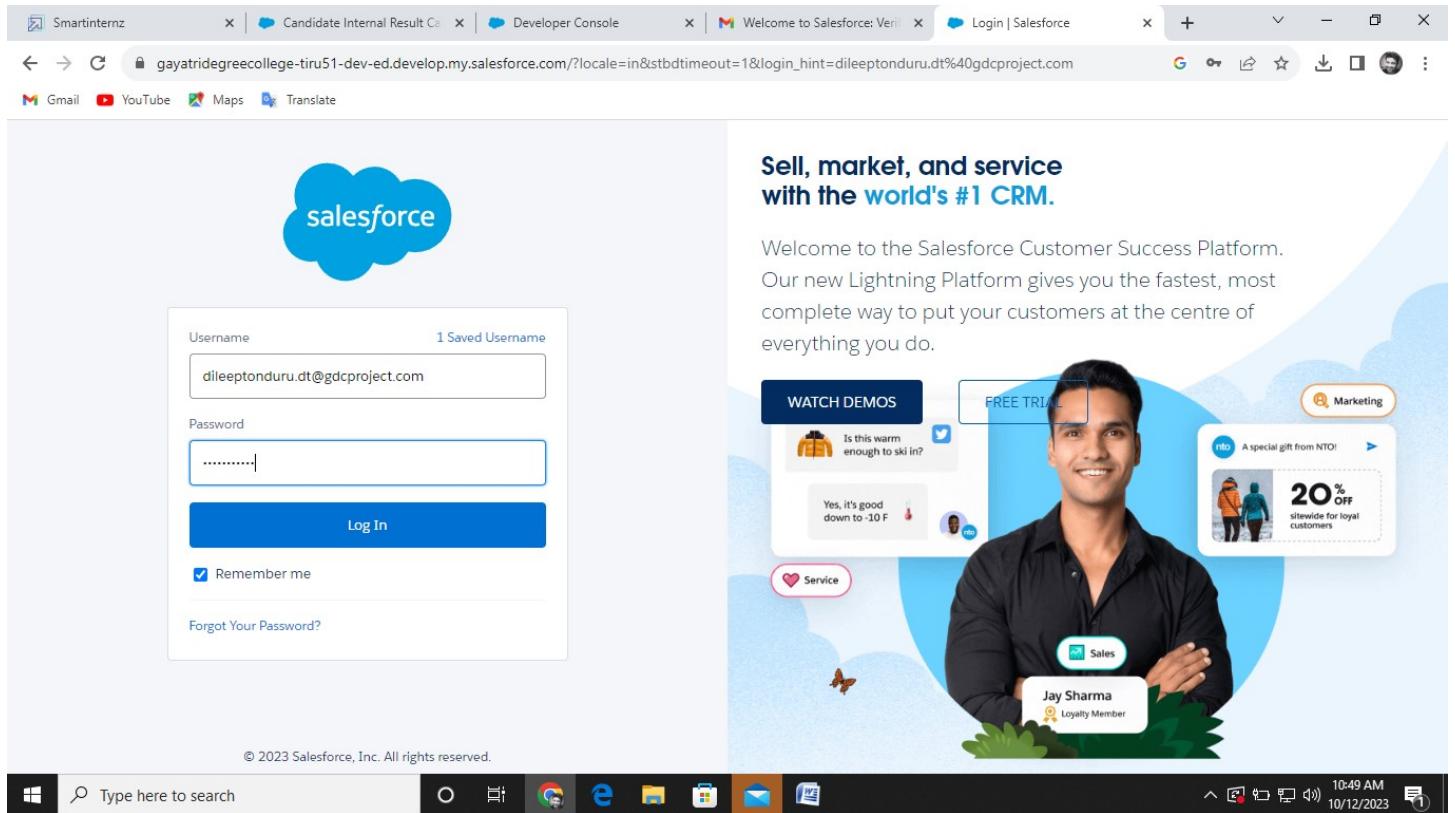
Account Activation

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 Dropdownclick 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 navigation bar with icons for Setup, Home, and Object Manager. The main content area is titled 'Lecturer Details' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar titled 'Details' lists various setup categories: 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 panel is titled 'Details' and contains fields for the 'Lecturer_Details__c' object. The 'API Name' field is set to 'Lecturer_Details__c'. Under the 'Custom' section, the 'Singular Label' is 'Lecturer Details' and the 'Plural Label' is 'Lecturer Details'. On the right side, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', 'Track Field History', and 'Deployment Status' (set to 'Deployed'). The 'Help Settings' field points to 'Standard salesforce.com Help Window'. At the bottom right of the main panel, 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 following details:

- Tab Bar:** The top bar includes tabs for "Smartinternz", "Internal results | Salesforce", and a new tab icon.
- Search Bar:** A search bar with the placeholder "Search Setup" is located at the top right.
- Header:** The header displays the Salesforce logo, a cloud icon, and the URL "gayatridegreecollegefir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l5h000001gNFV/Details/view".
- Navigation:** The navigation bar includes "Setup", "Home", and "Object Manager".
- Breadcrumbs:** The breadcrumb trail shows "SETUP > OBJECT MANAGER Internal results".
- Left Sidebar:** A sidebar titled "Details" lists various setup categories: 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.
- Right Panel:** The main panel is titled "Details" and shows the configuration for the "Internal_results__c" object. It includes fields for API Name (Internal_results__c), Singular Label (Internal results), Plural Label (Internal results), and various settings like Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.
- Bottom Bar:** The bottom bar includes a search bar, a ribbon of icons, and a system status bar showing "2:46 PM 09-10-2023".

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 interface with the 'Custom Tabs' page open. The page header includes the Salesforce logo, a search bar, and navigation links for 'Setup', 'Home', and 'Object Manager'. A sidebar on the left provides quick access to 'User Interface' components like 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and contains a brief description of what custom tabs are used for. Below this is a table titled 'Custom Object Tabs' with the following data:

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	

Below this table is another section titled 'Web Tabs' which states 'No Web Tabs have been defined'.

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 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

CI Candidate Internal Result C...

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 for creating a new field. The top navigation bar includes tabs for 'Smartinternz' and 'Lecturer Details | Salesforce'. The URL in the address bar is <http://gayatridegreecollegeir-1e8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l5h000001gNFQ/FieldsAndRelationships/new>. The page title is 'Lecturer Details'. The left sidebar lists various setup categories like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'SETUP > OBJECT MANAGER' and shows the 'Lecturer Details' object. Under 'Fields & Relationships', the 'Lookup Relationship' option is selected. A detailed description of 'Lookup Relationship' is provided, stating it creates a relationship between the current object and another object. It also mentions 'Master-Detail Relationship' and 'External Lookup Relationship'. Other field types listed include 'Formula', 'Roll-Up Summary', 'Checkbox', 'Currency', 'Date', 'Date/Time', 'Email', and 'Location'. The bottom of the screen shows the Windows taskbar with the date and time as 09-10-2023 at 3:14 PM.

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
5. 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 URL <https://gayatridegreecollegeir-1e8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The page title is "Object Manager". The top navigation bar includes "Setup", "Home", and "Object Manager". A search bar contains the text "led". The main content area displays a table titled "Object Manager" with one item listed:

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

The bottom of the screen shows a Windows taskbar with various icons and a system tray indicating the date and time as 09-10-2023 at 3:18 PM.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Smartinternz', 'Lecturer Details | Salesforce', and a '+' button. The URL in the address bar is 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 navigation options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The right pane is titled 'Fields & Relationships' and displays a table with 6 items, sorted by Field Label. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data in the table 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 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 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"/>	Edit Chatter Expert	Chatter	chatty_00d5h000008vu5eam.lidbglobknpg@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit SIVADEEP JANAGANI	JSIVA	sivadeepsvadeep595@gdcproject.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit Teacher_Class	cteac	sivadeepsivadeep595@2023mail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	Edit User_Integration	integ	integration@00d5h000008vu5eam.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	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 is a table with columns: PI NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various objects, including 'Candidate App page', 'Candidates', 'Appointment Category', 'Appointment Invitation', 'Appointment Invitee', 'Appointment Topic Time Slot', 'Asset', 'Asset Action', and 'Asset Action Source'. The 'Candidate Internal Result Card' app is selected in the sidebar under the 'Apps' section. The status bar at the bottom shows the URL 'force.com/lightning/app/06m5h000003Xh4dAAC', the date '09-10-2023', and the time '3:39 PM'.

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 Developer Console Welcome to Salesforce: Version 42.0 Login | Salesforce

Gmail YouTube Maps Translate

Search... Candidate Internal ... Semesters Candidate App page Course Details Lecturer Details Internal results Candidates Reports Dashboards

Course Details Recently Viewed ▾

7 items • Updated 4 minutes ago

	Course Details Name	Action
1	MBA	More
2	BSC	More
3	BSC	More
4	BCA	More
5	BSC	More
6	BETCH	More
7	BETCH	More

Type here to search 11:03 AM 10/12/2023

Smartinternz New Course Details | Salesforce Developer Console Welcome to Salesforce: Version 42.0 Login | Salesforce

Gmail YouTube Maps Translate

Search... Candidate Internal ... Semesters Candidate App page Course Details Lecturer Details Internal results Candidates Reports Dashboards

New Course Details

* = Required Information

Information

*Course Details Name: Owner: TONDURU DILEEP

Duration:

Duration (Years):

Course Name:

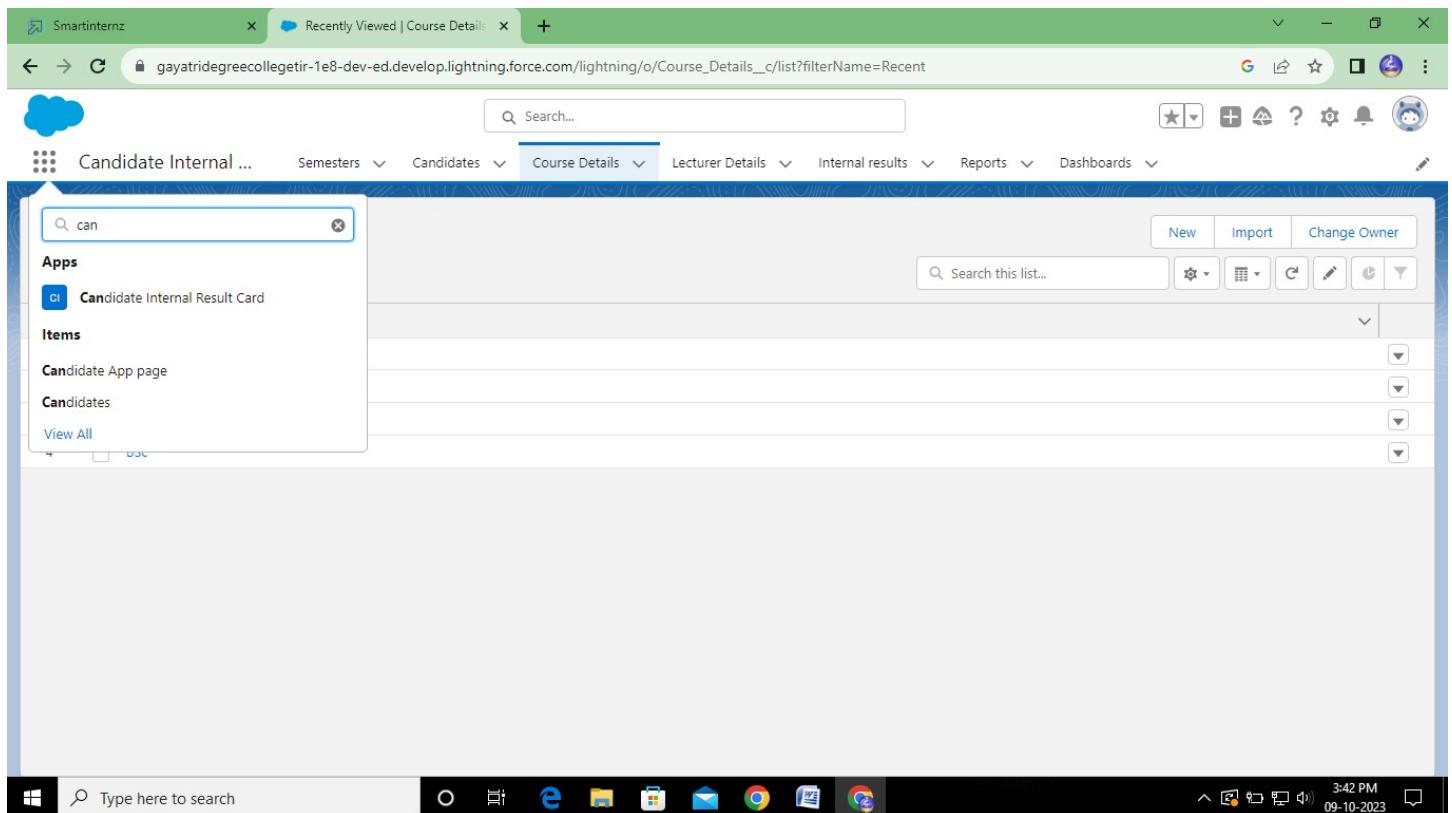
Cancel Save & New Save

Type here to search 11:05 AM 10/12/2023

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.

Screenshot of a web browser showing a Salesforce Lightning interface for Course Details. A search bar at the top left contains "can". The main area shows a table with columns: Name, Status, Start Date, End Date, and Actions. A sidebar on the left lists "Candidate Internal ..." under "Items". The bottom status bar shows the date as 09-10-2023 and the time as 3:42 PM.

Screenshot of a web browser showing a Salesforce Lightning interface for Course Details. A search bar at the top left contains "Recently Viewed". The main area shows a table with columns: Name, Status, Start Date, End Date, and Actions. A sidebar on the left lists "Course Details" under "Recently Viewed". The bottom status bar shows the date as 10/12/2023 and the time as 11:01 AM.

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

- . 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 'gayatridegreecollegeituru161-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXvncnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIj...'. The main content area displays a report titled 'Semesters with Course'. The report has 'Outline' selected in the Fields sidebar. The data table shows the following information:

Course: Course Name	Semester: Semester Name	Course: Course Details	Duration
BCA (1)	SEM 5	BCA (DATA SCIENCE)	Small Course
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)			

Below the table, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'. The Fields sidebar also includes sections for 'Groups' (with 'GROUP ROWS' and 'Add group...'), 'Course: Course Name', 'Columns' (with 'Add column...'), 'Semester: Semester Name', 'Course: Course Details', and 'Duration'. On the right side of the report preview, there is a note: 'Previewing a limited number of records. Run the report to see everything.' and a toggle switch for 'Update Preview Automatically'. The bottom of the screen shows the Windows taskbar with icons for Start, Search, Task View, Edge, File Explorer, Mail, Google Chrome, and File Explorer, along with the date and time (9:24 AM, 12-10-2023).

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

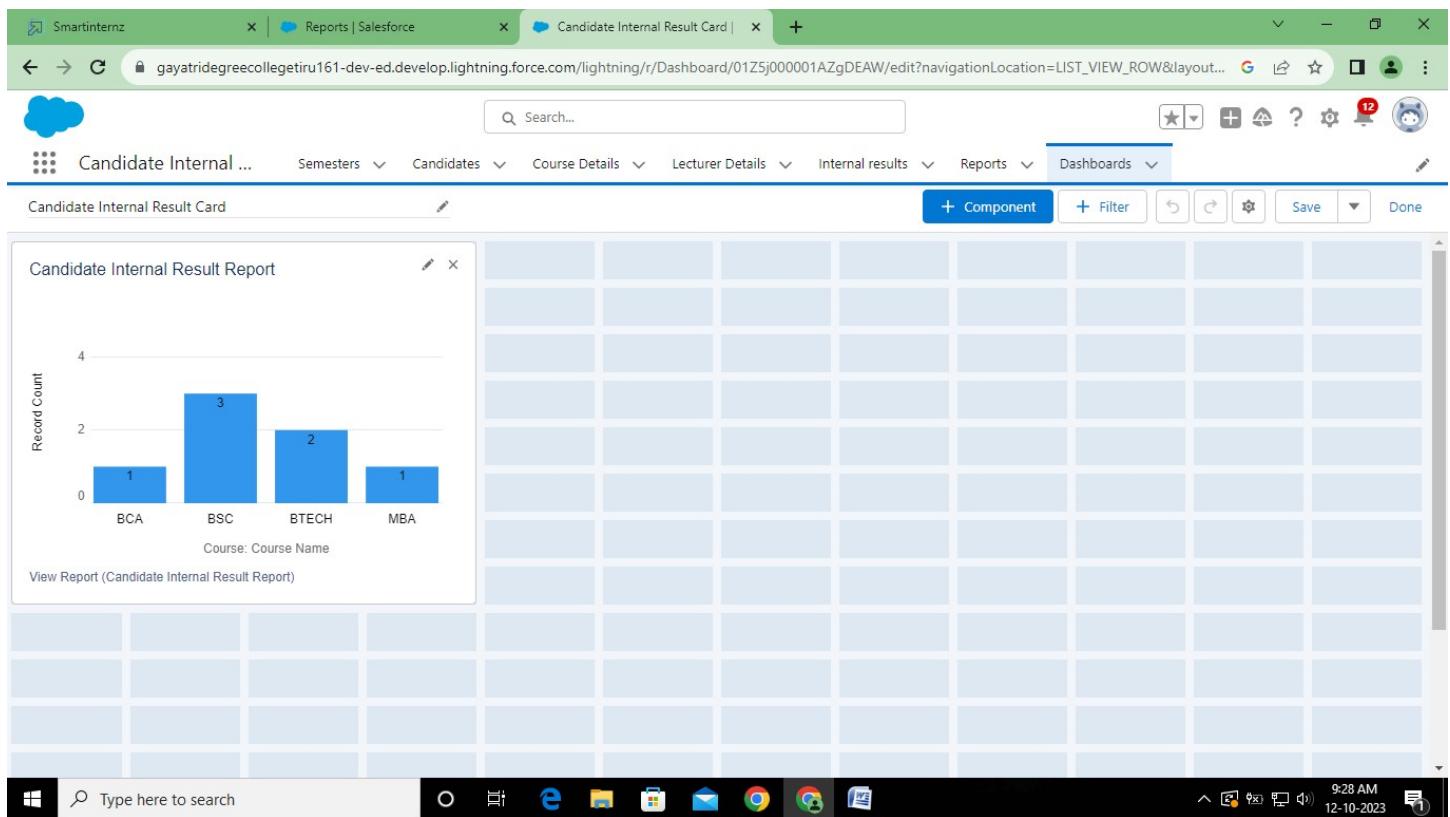
1. Click on Dashboards tab from the Candidate Internal Result Card application.
2. Click on new dashboard.
3. Give name- Candidate Internal Result Card
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Candidate Internal Result Report which you created.
7. For the data 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 the following details:

- Address Bar:** gayatridegreecollegeiru161-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru
- Tab Bar:** Contains three tabs: "Smartinternz", "Reports | Salesforce", and "Dashboards | Salesforce".
- Header:** Includes a search bar, a cloud icon, and various navigation links: Candidate Internal ..., Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports, Dashboards.
- Left Sidebar:** Titled "Dashboards Recent", it lists categories: DASHBOARDS, FOLDERS, and FAVORITES. Under DASHBOARDS, "Recent" is selected, showing a single entry: "Candidate Internal Result Card".
- Table:** Displays the "Candidate Internal Result Card" record with columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed.
- Bottom Bar:** Shows a Windows taskbar with icons for File Explorer, Edge, File, Mail, Photos, Google Chrome, and Microsoft Word. It also displays the date and time: 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

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.

Flow Definitions All Flows

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://gayatridegreecollegeitiru161-dev-ed.develop.lightning.force.com/one/one.ap...

9:34 AM 12-10-2023

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

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

- ↻ +

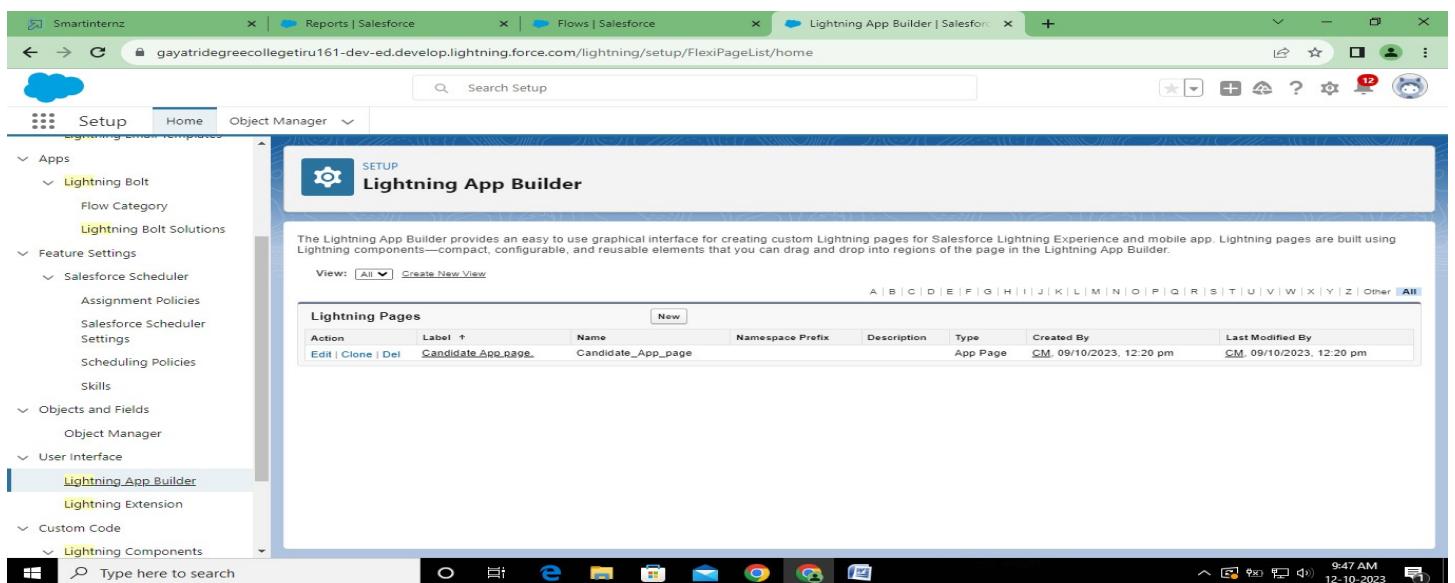
9:35 AM 12-10-2023

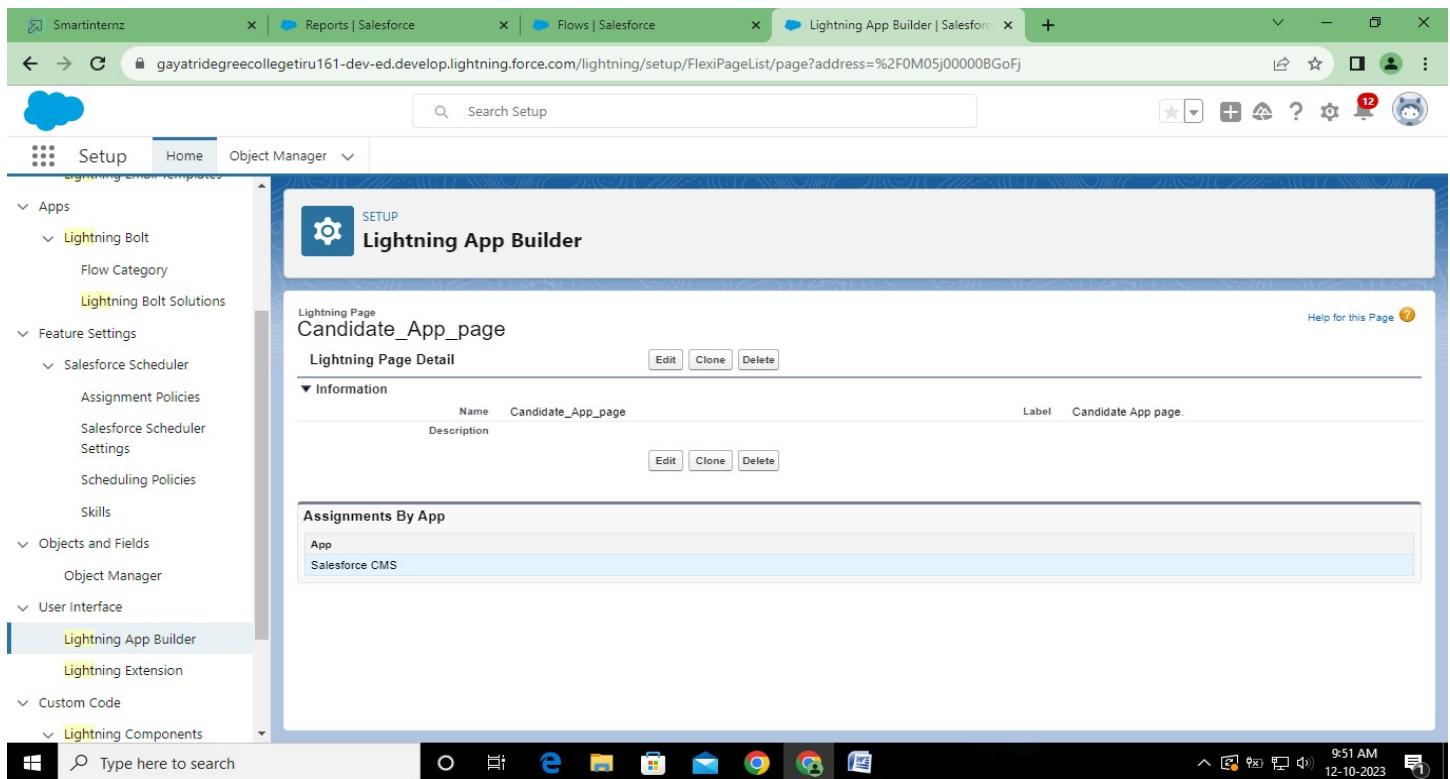
Milestone – 11: App Page

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         for(Internal_results__c internalmarks : newlist){  
4             if(internalmarks.marks__c >= 200){  
5                 internalmarks.status__c = 'Pass';  
6             }else{  
7                 internalmarks.status__c='fail';  
8             }  
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 shows no problems.

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 shows no problems.

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: DILEEP
- Course: MBA
- Marks: 300

The "Status" section shows "Available" and "Chosen" status options, with "Pass" selected. The modal includes "Cancel", "Save & New", and "Save" buttons.

The screenshot shows the Salesforce Lightning interface with the "Internal results" tab selected. A record for "TEST TRIGGERS" is displayed. The "Details" tab is active, showing the following data:

Field	Value
Internal results Name	TEST TRIGGERS
Candidate	DILEEP
Course	MBA
Candidate Roll Number	5
Marks	300
Status	Pass

Below the details, it shows "Created By" as TONDURU DILEEP and "Last Modified By" as TONDURU DILEEP, both on 12/10/2023, 11:10 am.

THE END