

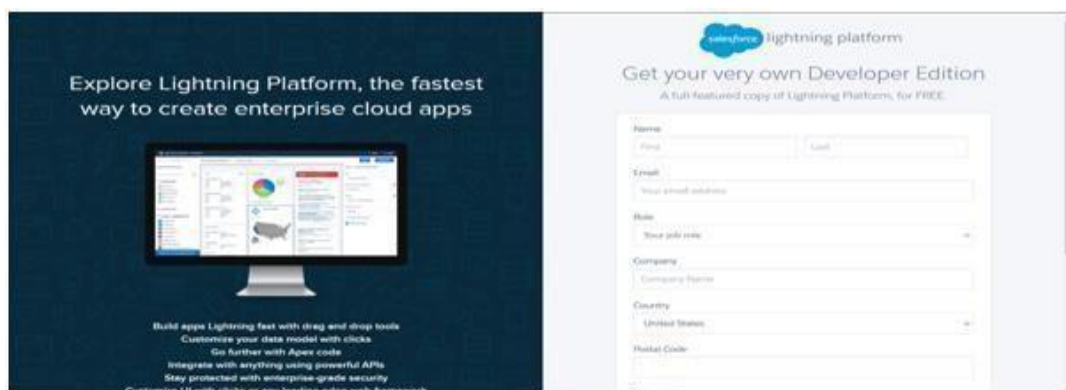
Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/Signup
2. Click on sign up.
3. On the sign-up form, enter the following details:
 1. First name & Last name
 2. Email
 3. Role: Developer
 4. Company: College Name
 5. Country: India
 6. Postal Code: pin code
 7. Username: should be a combination of your name and company

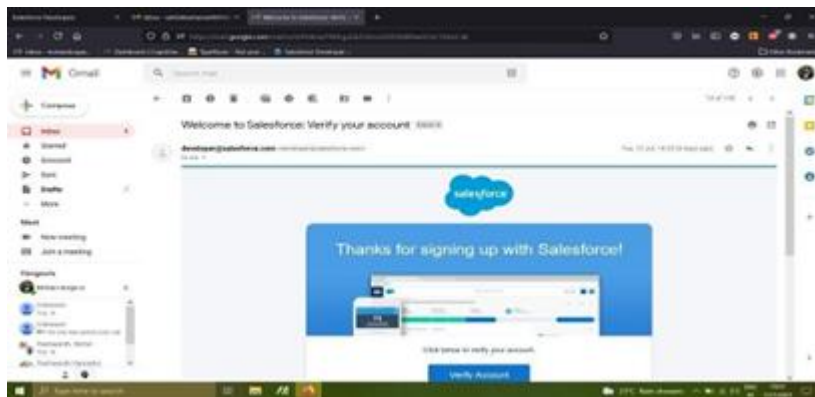
This need not be an actual email id, you can give anything in the format: [username@organization.com](#)

Click on sign up after filling these.



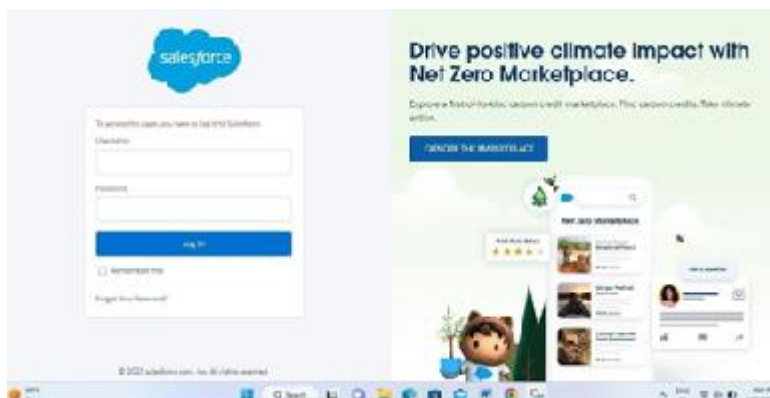
Account Activation

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.

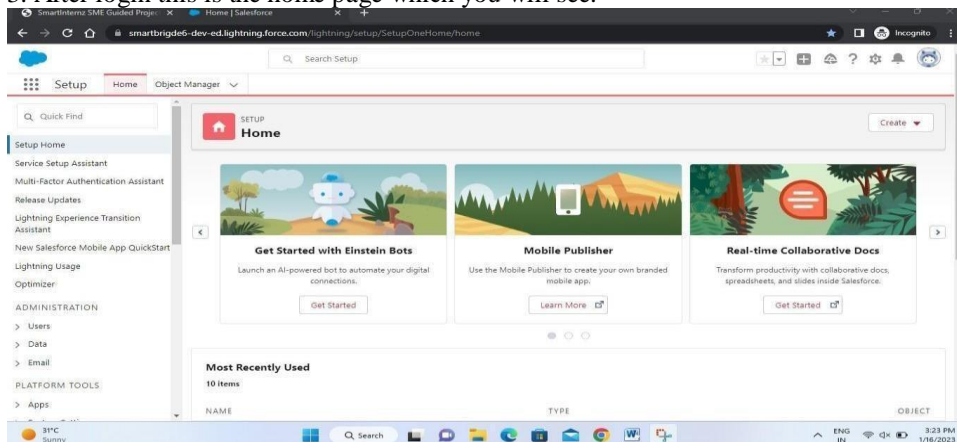


Salesforce Login

<https://login.salesforce.com>

Login to Your Salesforce Account

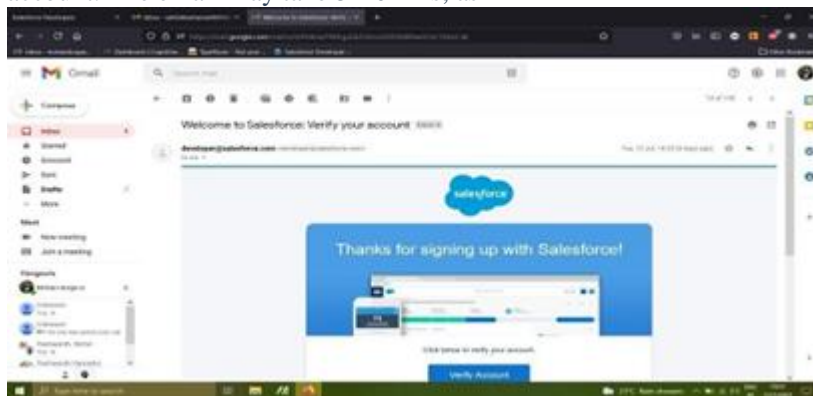
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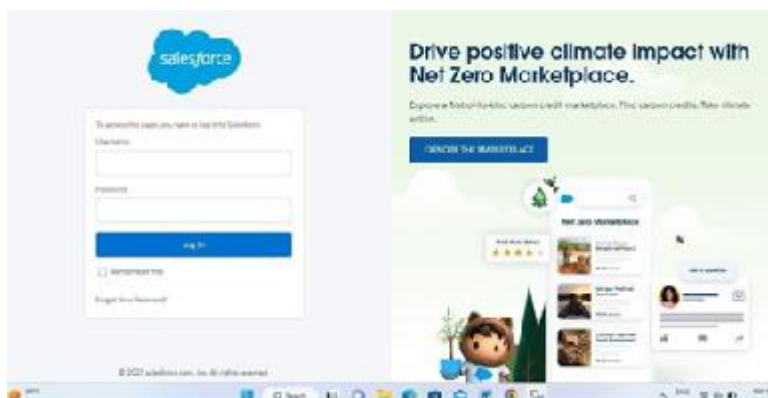
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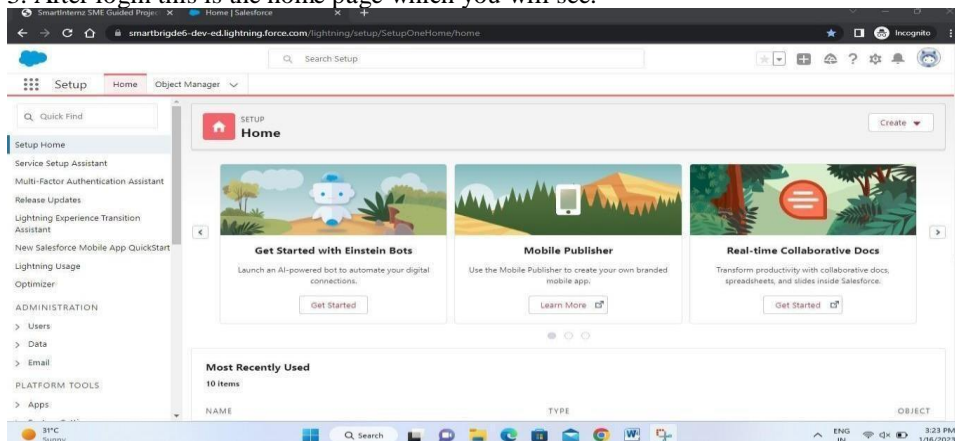


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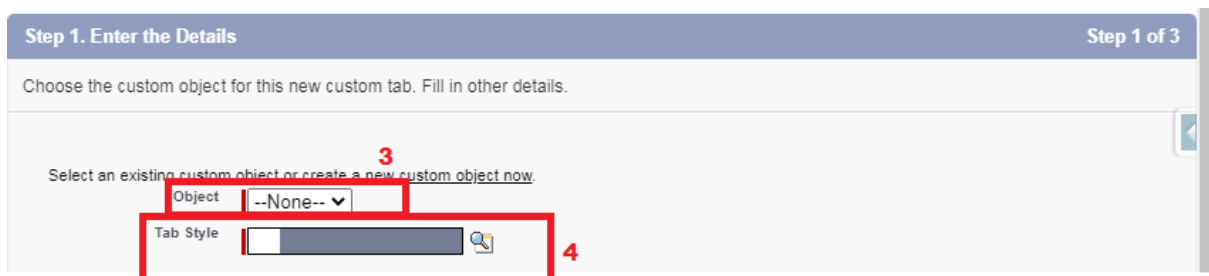
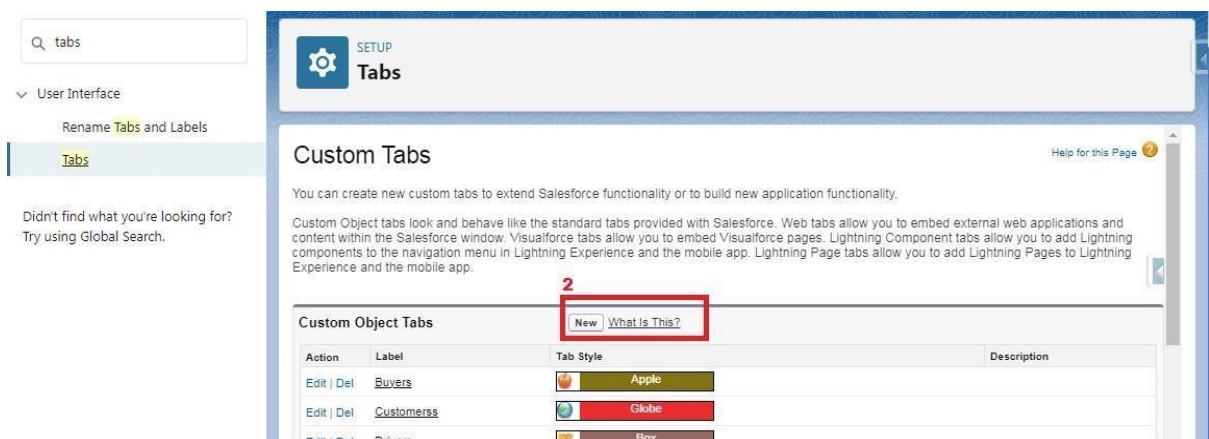
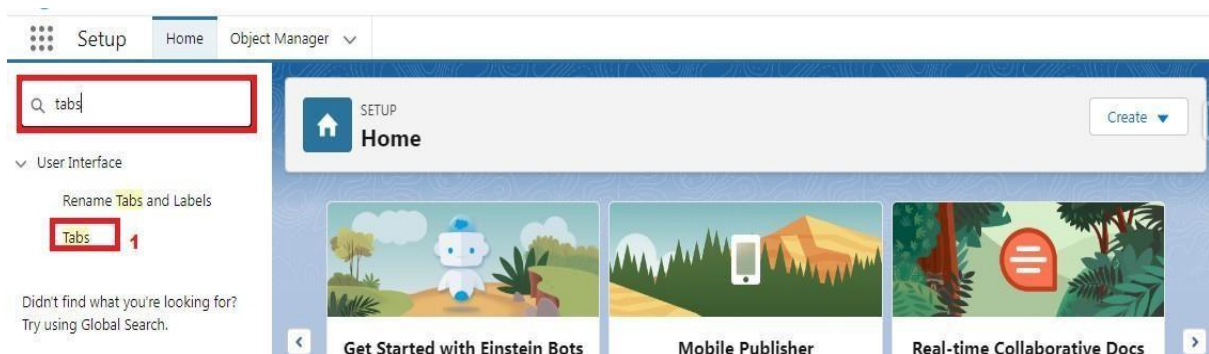


Salesforce Login <https://login.salesforce.com>

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 .



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The image shows two screenshots of the Salesforce Setup interface. The top screenshot shows the 'Home' tab selected in the top navigation bar. In the left sidebar, under 'User Interface', the 'Tabs' link is highlighted with a red box and a red number '1'. The main content area shows the 'Home' dashboard with tiles for 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. The bottom screenshot shows the 'Tabs' page selected. In the left sidebar, the 'Tabs' link is highlighted with a red box and a red number '1'. The main content area shows the 'Custom Tabs' page. A red box with a red number '2' highlights the 'New' button in the 'Custom Object Tabs' section. Below this, a table lists existing custom object tabs: 'Buyers' (Apple style), 'Customers' (Globe style), and 'Drivers' (Box style). A red box with a red number '3' highlights the 'Object' dropdown menu, which is currently set to '--None--'. A red box with a red number '4' highlights the 'Tab Style' dropdown menu, which is currently set to 'Apple'.

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: --None--

Tab Style: Apple

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.



Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text 6
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted) i
Time
URL

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text 6
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted) i
Time
URL

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Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details Step 2 of 4

Previous **Next** 9 Cancel

Field Label **Lecturer Role** i 7

Length **40** 8

Field Name **Lecturer_Role** i

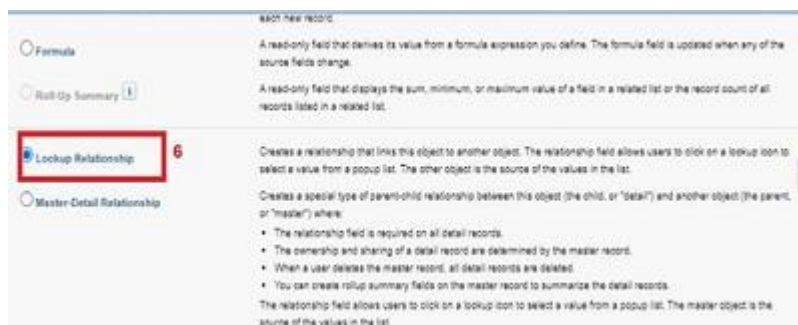
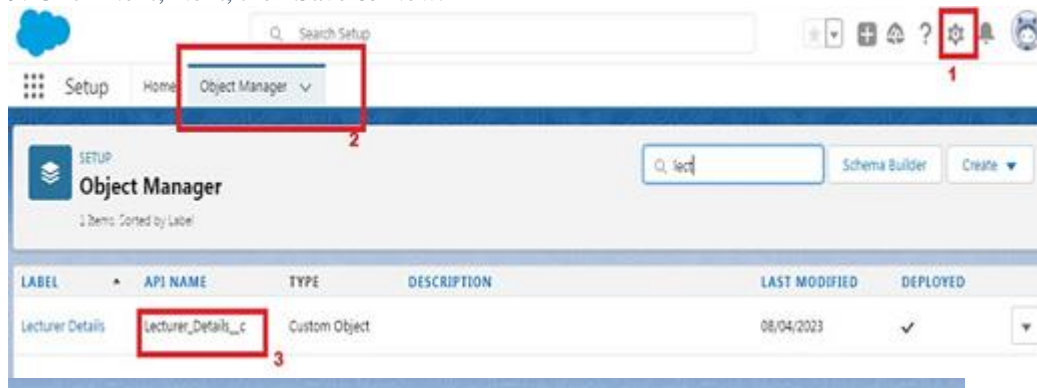
Description

Help Text

i

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.



A screenshot of a field configuration form. A red box labeled '1' highlights the 'Field Label' and 'Field Name' fields, both containing the text 'Semester Name'. Another red box labeled '8' highlights the 'Description' and 'Help Text' fields, which are empty.

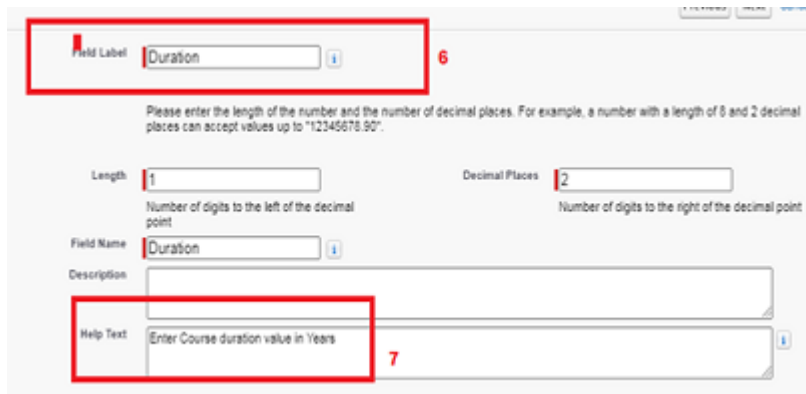
Note- Similarly create all lookup fields on their respective objects.

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.





Field Label: Duration (6)

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 1 (Number of digits to the left of the decimal point)

Decimal Places: 2 (Number of digits to the right of the decimal point)

Field Name: Duration

Description:

Help Text: Enter Course duration value in Years (7)

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.




Setup (1)

Object Manager (2)

Lecturer Details (3)

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		08/04/2023	✓



Fields & Relationships (4)

New (5)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(50)		
Created By	CreatedById	Lookup(User)		



Data Type

☐ None Selected

☐ Auto Number

☒ Formula (6)

Select one of the data types below:

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

Field Label **Candidate Roll Number** 7 Field Name **Candidate_Roll_Number** 1

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity 1

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin * Amount - Cost_c`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date + CloseDate - 7`

☐ DateTime Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `Next * NOW() + 1`

☐ Number Calculate a numeric value.
Example: `Fahrenheit * 1.8 * Celsius_c + 32`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount * (Amount - Discounted_Amount_c) / Amount`

☒ Text 8 Create a text string, for example, by concatenating other text fields.
Example: `{Full Name & " " & First Name}`

Example: Full Name = LastName & ", " & FirstName [More Examples...](#)

Simple Formula Advanced Formula

Insert Field 9 **Insert Operator**

Candidate roll Number (Text) =

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Insert Field 10

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Internal results >	Candidate >	Address
\$Api >	Candidate >	Candidate Name
\$Organization >	Created By >	Candidate Roll Number
\$Profile >	Created By ID	City
\$System >	Created Date	Created By >
\$User >	Internal results Name	Created By ID
\$UserRole >	Last Modified By >	Created Date
	Last Modified By ID	Education
	Last Modified Date	Email

You have selected:
Candidate_r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c

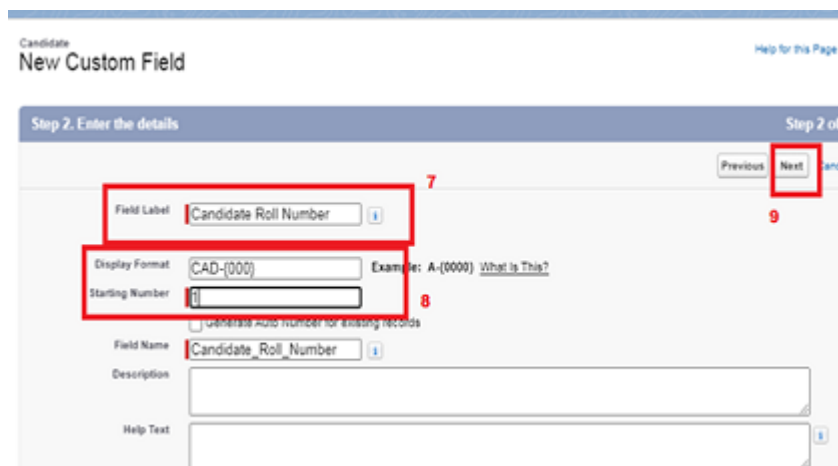
Insert

Close

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.



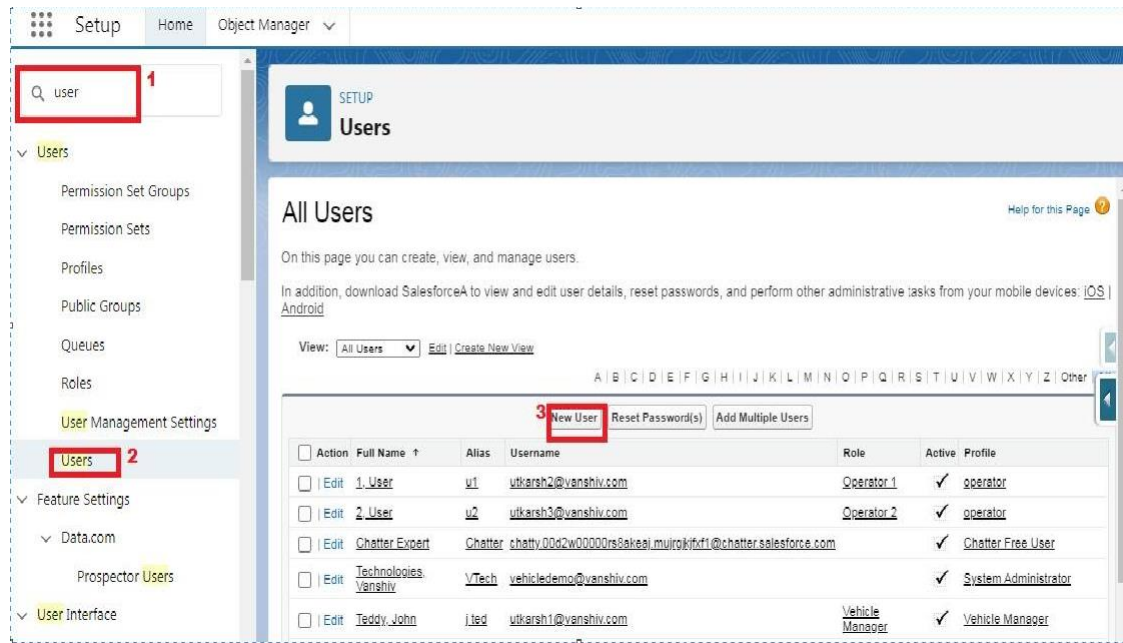
Creating A User

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.



User Edit [Save] [Save & New] [Cancel]

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Role:

User License:

Profile:

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

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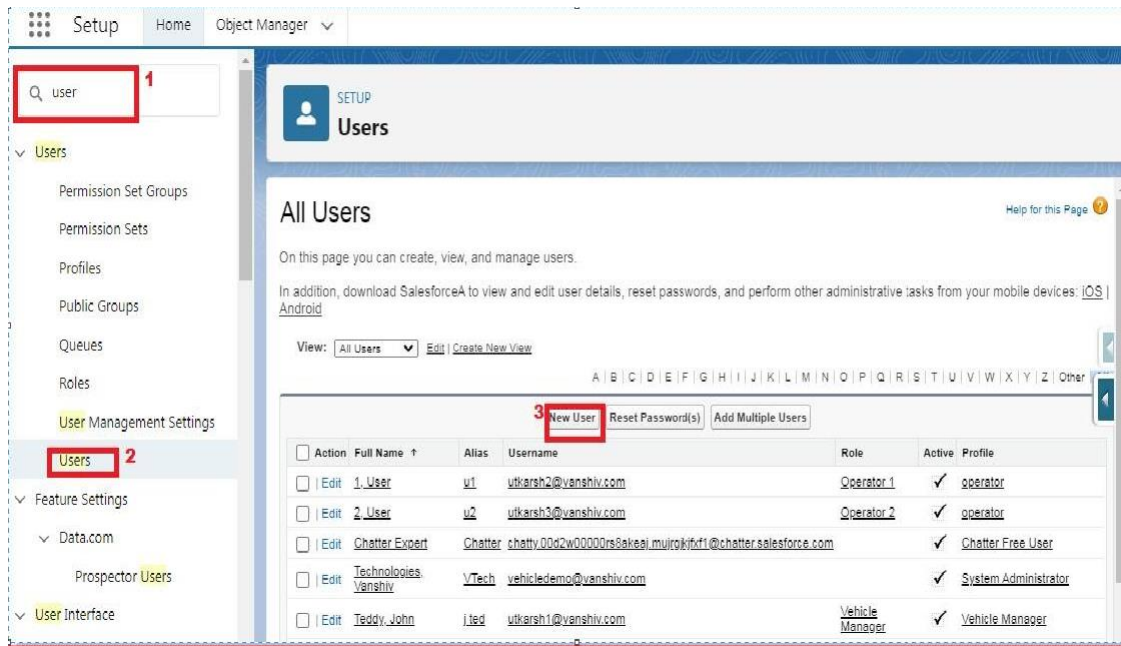
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User Edit Save Save & New Cancel

General Information

First Name Class

Last Name Teacher

Alias cteach

Email +++@+++ .com

Username +++@+++ .com

Nickname class

Title

Company

Department

4

5 Role <None Specified>

6 User License Salesforce

Profile Standard User

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

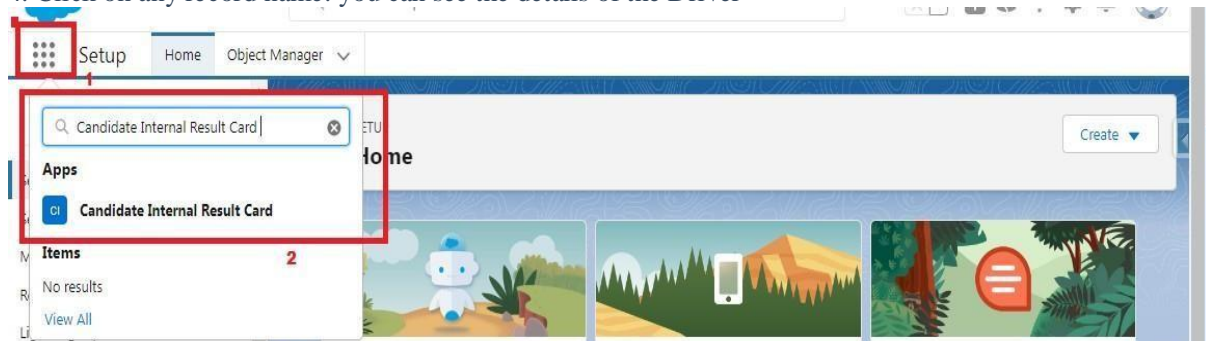
Flow User ☐

Service Cloud User ☐

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



Course Details

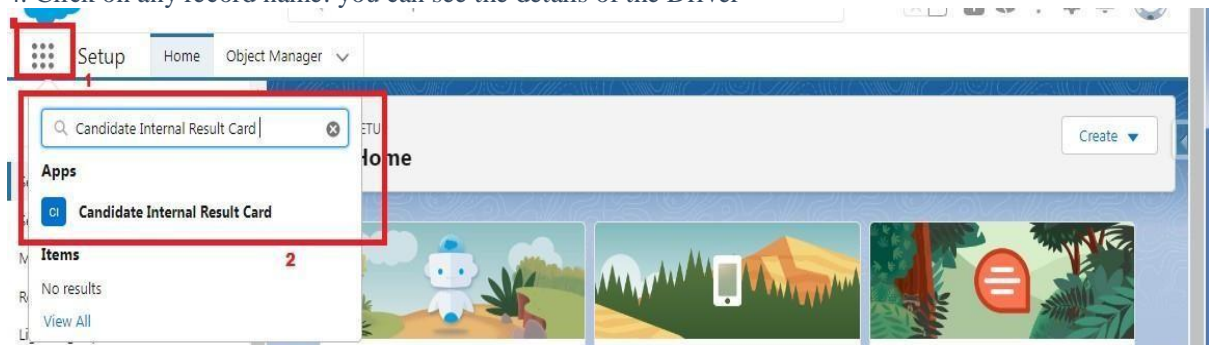
4 items • Sorted by Course Name • Filtered by All course details • Updated a few seconds ago

	<input type="checkbox"/> Course Name ↑	Duration	Created Date
1	<input type="checkbox"/> BCA	3.00	09/04/2023, 7:39 pm
2	<input type="checkbox"/> BSc	3.00	09/04/2023, 7:39 pm
3	<input type="checkbox"/> Btech	4.00	09/04/2023, 7:38 pm
4	<input type="checkbox"/> MBA	2.00	09/04/2023, 7:38 pm

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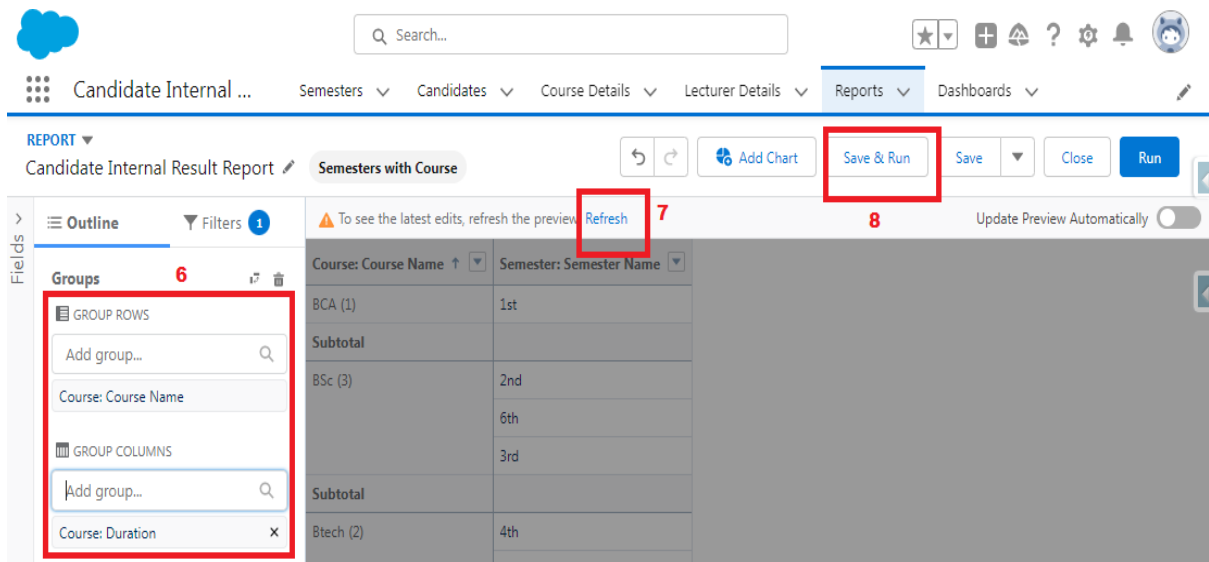
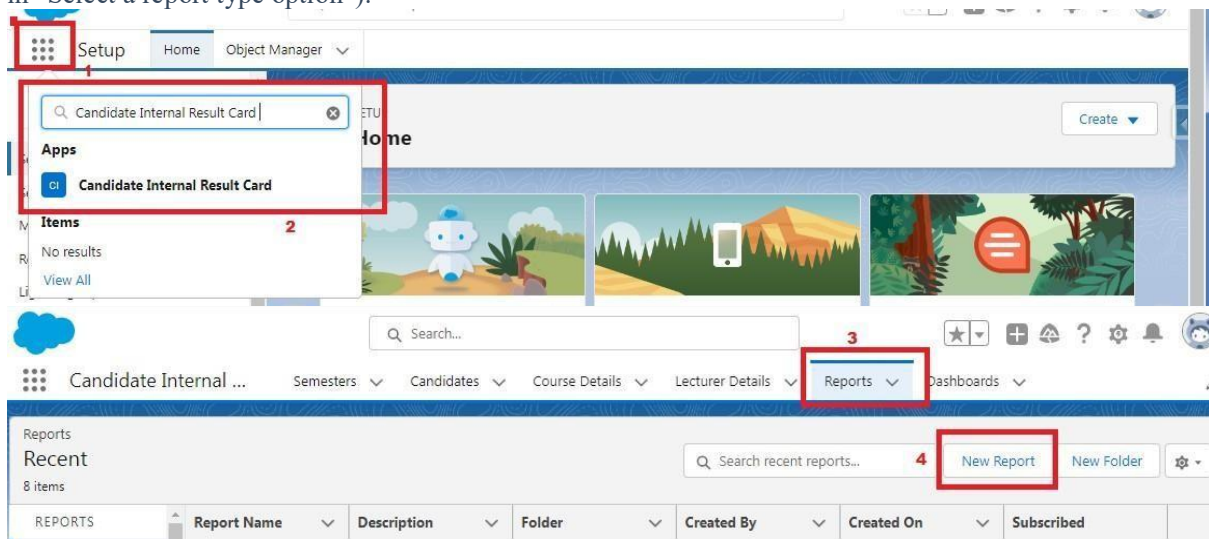
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3	<input type="checkbox"/> Btech	4.00	09/04/2023, 7:38 pm
4	<input type="checkbox"/> MBA	2.00	09/04/2023, 7:38 pm

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”).



Save Report

* Report Name

Candidate Internal Result Report

Report Unique Name ⓘ

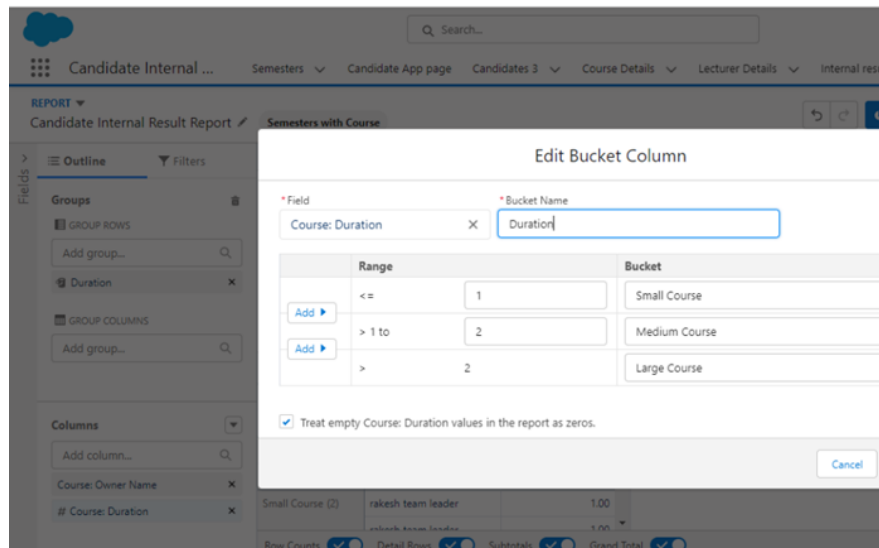
Candidate_Internal_Result_Report_bkY

Report Description

Cancel

Save

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.



Save Report

*** Report Name**

Candidate Internal Result Report

Report Unique Name ⓘ

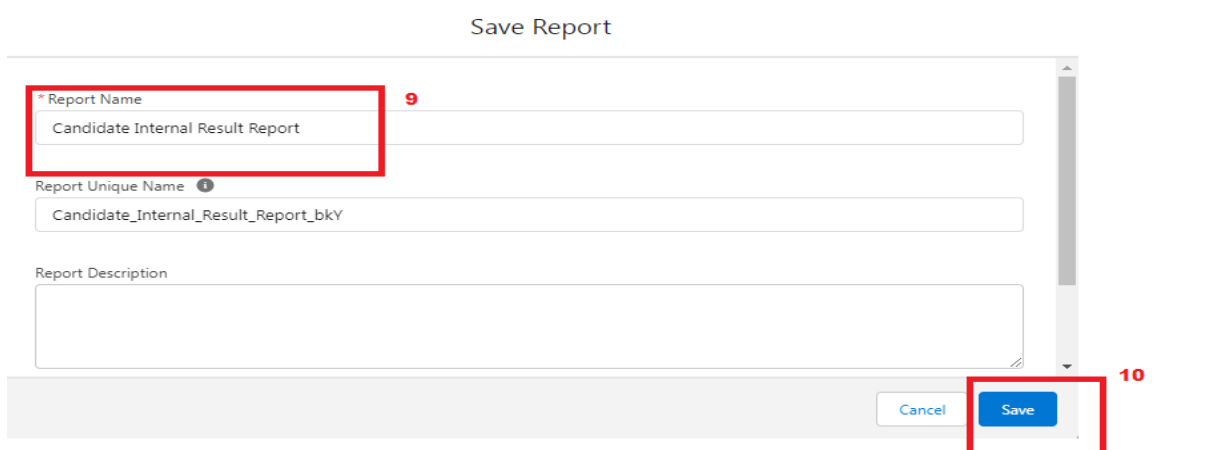
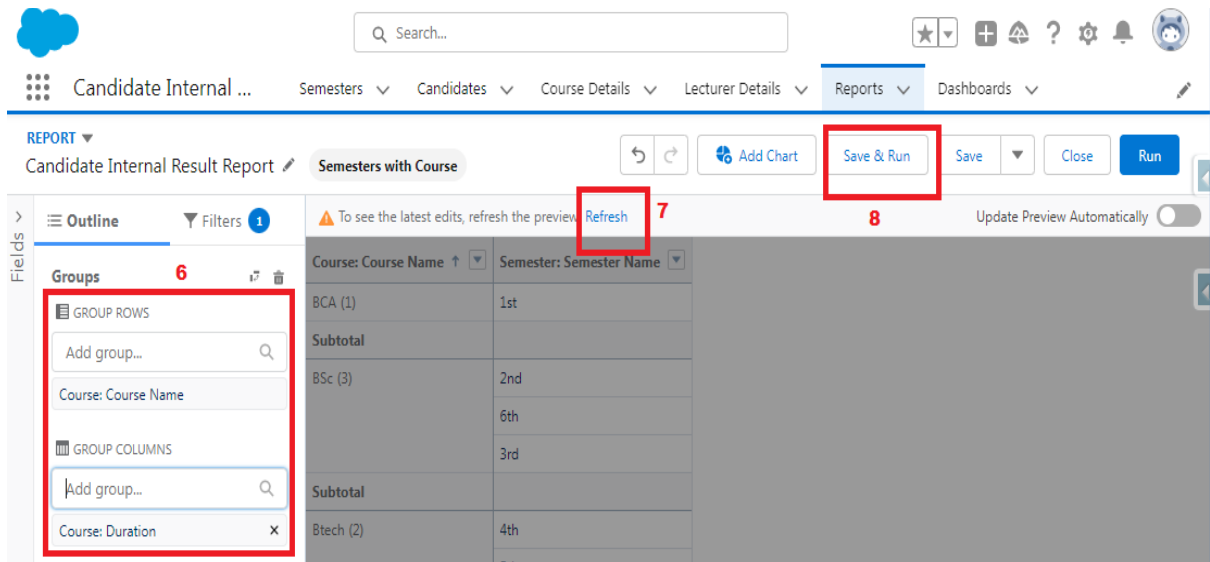
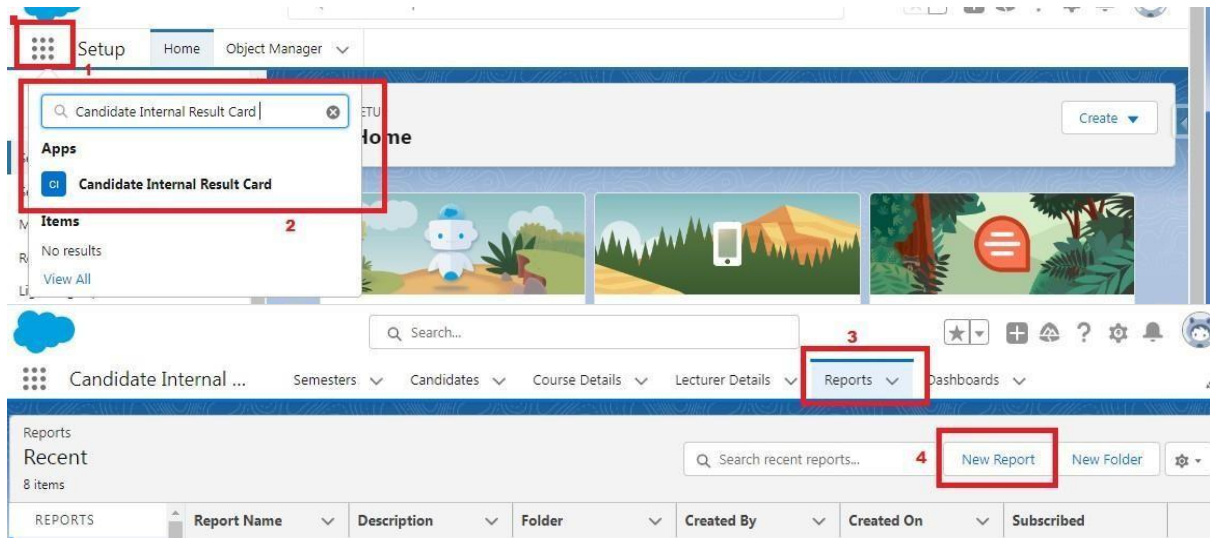
Candidate_Internal_Result_Report_bkY

Report Description

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9. Once you are satisfied with the report setup, click "Save" to save the report.

The screenshot shows the 'Edit Bucket Column' dialog in a reporting tool. The dialog is titled 'Edit Bucket Column' and has a 'Field' property set to 'Course: Duration' and a 'Bucket Name' property set to 'Duration'. Below these properties is a table for defining bucket ranges and names.

Range	Bucket
<= 1	Small Course
> 1 to 2	Medium Course
> 2	Large Course

There are 'Add' buttons next to the range definitions. Below the table, there is a checkbox labeled 'Treat empty Course: Duration values in the report as zeros.' which is checked. A 'Cancel' button is at the bottom right.

The background shows a report preview with columns: 'Small Course (2)', 'rakesh team leader', and '1.00'. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked.

Save Report

* Report Name

Candidate Internal Result Report

9

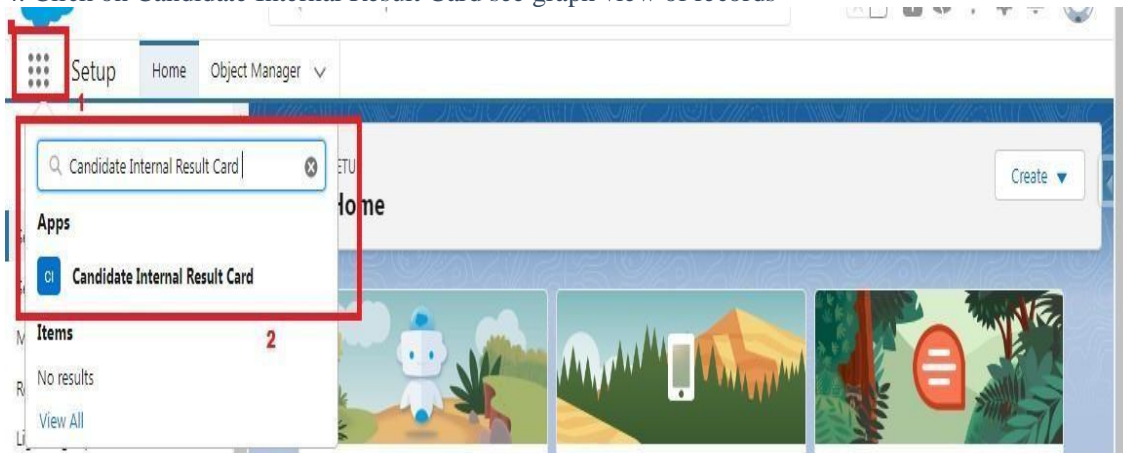
Report Unique Name

Candidate_Internal_Result_Report_bkY

Report Description

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



Candidate Internal ...

Semesters

Candidates

Course Details

Lecturer Details

Reports

Dashboards

3

Dashboards

Recent

8 items

Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Property's with Customer Name Report		Private Dashboards		8/4/2023, 12:58 pm	
Created by Me	Job application with candidate name		Private Dashboards		8/4/2023, 7:14 pm	
Private Dashboards	Events with Attendees		Private Dashboards		6/4/2023, 5:23 pm	
All Dashboards	Candidate Internal Result Card		Private Dashboards		9/4/2023, 8:00 pm	
FOLDERS	Travel Approval		Private Dashboards		1/4/2023, 12:58 pm	
All Folders	Employee Travel detail		Private Dashboards		8/4/2023, 12:22 pm	