



Implementing CRM for Result Tracking of a Candidate with Internal Marks



SALESFORCE NAAN MUDHALVAN PROJECT REPORT

Submitted By

GOPINATH K (6112202205007)
KISSHORE S V (6112202205016)
PRAVEEN ESWAR K (6112202205025)
ILANCHERAN R (6112202205304)

in partial fulfilment for the award of the

degree of

BACHELOR OF TECHNOLOGY

in
INFORMATION TECHNOLOGY

**KNOWLEDGE INSTITUTE OF TECHNOLOGY,
SALEM-637504**

ANNA UNIVERSITY::CHENNAI 600025

BONAFIDE CERTIFICATE

Certified that this project report titled "**Implementing CRM for Result Tracking of a Candidate with Internal Marks**" is the bonafide work of "**GOPINATH K (611220205007) , KISSHORE S V(611220205016) , PRAVEEN ESWAR K (611220205025) , ILANCHERAN R(611220205304)**" who carried out the projectwork under my supervision.

SIGNATURE

Mr. R. AYYAPPAN. ME.,

ASSISTANT PROFESSOR

FACULTY MENTOR

Department of Information
Technology,

Knowledge Institute of Technology,
Kakapalayam,
Salem- 637 504.

SIGNATURE

Mr. T. KARTHIKEYAN B.TECH,M.S(IT),Ph.D,

ASSISTANT PROFESSOR

SPOC FACULTY

Department of Computer Science
and Engineering,

Knowledge Institute of Technology,
Kakapalayam,
Salem- 637 504.

SPOC

HEAD OF THE DEPARTMENT

ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to god, who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr.C.BALAKRISHNAN**, who has provided all the facilities to us. We would like to convey our sincere thanks to our beloved Principal **Dr.PSS.SRINIVASAN**, for forwarding us to do our project and offering adequate duration in completing our project. We express our sincere thanks to our Head of the Department **Dr.P.SACHIDHANANDAM**, Department of Computer Science and Business Systems for fostering the excellent academic climate in the Department.

We express our pronounced sense of thanks with deepest respect and gratitude to our Faculty Mentor **Mr.R.AYYAPPAN**, Department of Information Technology for their valuable and precious guidance and for having amicable relation.

With deep sense of gratitude, we extend our earnest and sincere thanks to our SPOC **Mr.T.KARTHIKEYAN**, Assistant Professor, Department of Computer Science and Engineering for his guidance and encouragement during this project.

We would also like express our thanks to all the faculty members of our Department, friends and students who helped us directly and indirectly in all aspects of the project work to get completed successfully.

TABLE OF CONTENTS

CHAPTER NO.	TITLE	PAGE NO.
1	INTRODUCTION	7
2	PROJECT SPECIFICATIONS	8
	2.1 Project Goal	8
	2.2 Project Scope	8
	2.3 Technical Requirements	12
	2.4 Functional Requirements	13
3	OBJECT CREATION	16
4	LIGHTNING APP	24
5	FIELDS AND RELATIONSHIP	27
6	CREATION ON PROFILE	35
7	CREATING A USER	37
8	REPORTS	40
9	TRIGGERS	43
10	FLOWS	46
11	DASHBOARD	55
12	GITHUB & PROJECT VIDEO DEMO LINK	58

LIST OF FIGURES

Figure No	Name of the Figure	Page No
2.3	Technical Architecture	12

LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER - 1

INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

CHAPTER - 2

PROJECT SPECIFICATIONS

2.1 Project Goal:

The primary goal of the Develop and deploy a comprehensive CRM system within Salesforce that effectively tracks and manages candidate information, including internal marks and performance metrics, to enhance the recruitment and evaluation process. The system should provide real-time access to candidate data, facilitate seamless communication between stakeholders, and enable data-driven decision-making for improved candidate selection and management."

2.2 Project Scope

- **Creation of Developer Account (Milestone 1):** This involves setting up a developer account on the Salesforce platform, which will serve as the foundation for building the CRM application.
- **Object Creation (Milestone 2):** Custom objects and relationships will be defined to efficiently store and manage data related to job applications, recruiters, and other relevant information.
- **Tabs Creation (Milestone 3):** Tabs will be configured to provide user-friendly access to different sections and functionalities within the CRM application.
- **Create App (Milestone 4):** The CRM application will be created, and it will serve as the central hub for managing job applications and accessing job postings.
- **Fields & Relationships (Milestone 5):** Custom fields and relationships will be established to capture specific data attributes related to job applications and recruiters.
- **Profile (Milestone 6):** User profiles will be configured to define access permissions and roles within the application.
- **Role and Role Hierarchy (Milestone 7):** Role-based access control will be set up to determine who can view and edit specific

data within the CRM.

- **Users (Milestone 8):** User management will involve adding and configuring user accounts, specifying their roles and access levels.
- **Sharing Rules (Milestone 9):** Sharing rules will be defined to ensure that users can appropriately share and access data based on predefined criteria.
- **User Adoption (Milestone 10):** Strategies and tools will be implemented to encourage user adoption and make the application user-friendly.
- **Reports (Milestone 11):** Custom reports will be created to track and analyse job application data, providing valuable insights for users.
- **Dashboards (Milestone 12):** Dashboards will be designed to display key performance indicators and visual summaries of application data.
- The project aims to create a comprehensive CRM application that helps job applicants track their applications and access job postings from recruiters. It covers the technical architecture, data modeling, and user adoption aspects of Salesforce. The scope is to deliver an efficient, user-friendly, and productive tool for managing the job application process within the Salesforce platform.

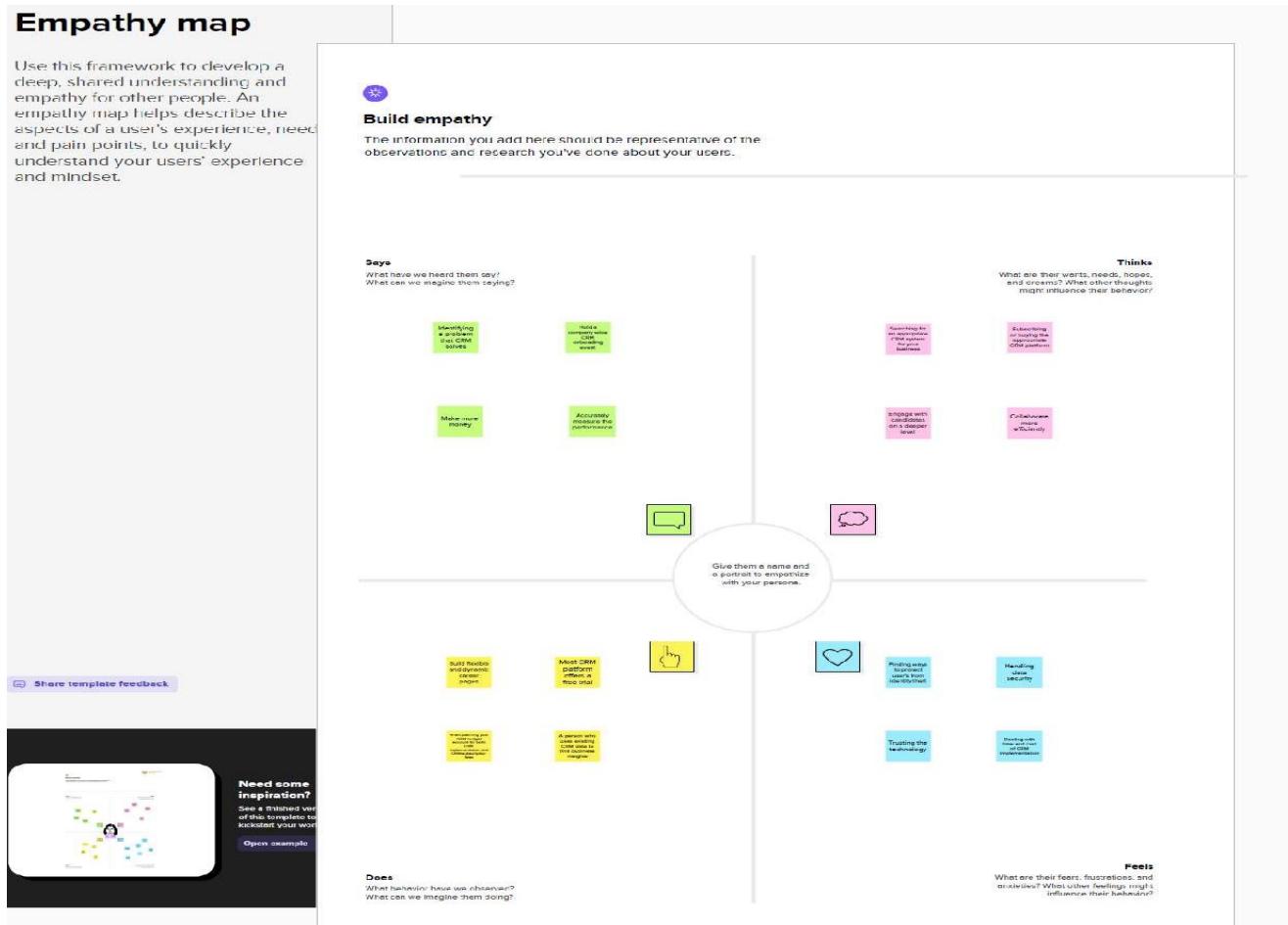
2.3 Empathy Map Canvas:

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.

Empathy map

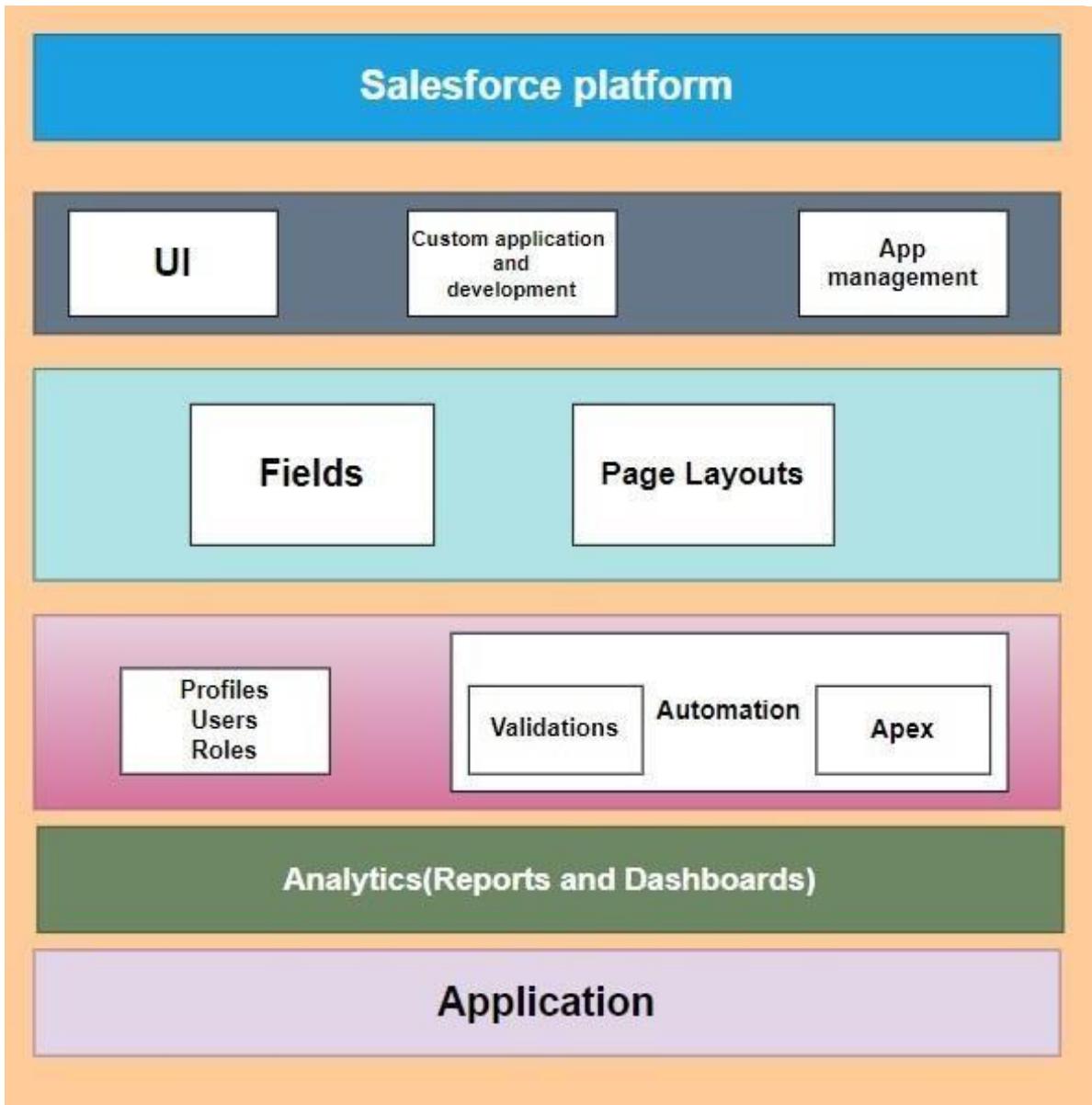
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, need and pain points, to quickly understand your users' experience and mindset.



2.3 Ideation & Brainstorming :

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

2.3 Technical Requirements



2.4 Functional Requirements

- **User Registration and Authentication:** Users should be able to create accounts with unique usernames and passwords. User authentication and authorization should be implemented to ensure data security.
- **Dashboard:** Users should have a personalized dashboard displaying key metrics such as the number of result applications submitted and the status of each application.
- **Result Application Tracking:** Users should be able to record details of each result application, including the result title, company, date applied, application status, and any related notes. Users should be able to filter and search through their result applications.
- **Result Postings:** Result postings from various recruiters should be accessible within the application. Users should be able to view details of result postings, such as result descriptions, qualifications, and application deadlines.
- **Custom Objects and Relationships:** Custom objects for result applications, result postings, and recruiters should be defined with appropriate relationships. Relationships between applicants and their result applications, as well as between result applications and result postings, should be established.
- **Profile Management:** Users should have the ability to edit their profiles and update personal information. Profiles should include user-specific settings and preferences.
- **Role-Based Access Control:** Access permissions should be defined based on user roles (e.g., applicant, recruiter). Users should only have access to data and features relevant to their roles.
- **User Management:** Administrators should be able to add, modify, or deactivate user accounts. User roles and permissions should be customizable.

- **Sharing Rules:** Sharing rules should be configured to allow data sharing based on predefined criteria, ensuring privacy and data access control.
- **Reporting:** Users should be able to generate custom reports based on their result application data. Standard reports and report templates should be available for common use cases.
- **Notifications and Reminders:** Users should receive notifications and reminders for application deadlines, interview schedules, and other important events. Notifications can be delivered via email or within the application.
- **Integration with External Platforms:** Integration with result search platforms or websites to import postings automatically. Integration with email services to track application-related correspondence.
- **Data Import and Export:** Users should have the capability to import and export their application data for backup or transfer purposes.
- **User Adoption Features:** Onboarding guides, tutorials, and tooltips to help users navigate and effectively use the system. Feedback mechanisms to collect user suggestions and improve the application.
- **Customization and Configuration:** Administrators should be able to customize the application's appearance, fields, and workflows to suit their organization's needs.
- **Mobile Accessibility:** The application should be accessible on mobile devices to allow users to track applications on the go.
- **Security and Data Privacy:** Data encryption, secure connections, and compliance with data privacy regulations (e.g., GDPR) should be implemented to protect user data.
- **Scalability:** The system should be scalable to accommodate a growing number of users, applications, and postings.
- **Backup and Recovery:** Regular data backups and a disaster recovery plan should be in place to prevent data loss.

CHAPTER - 3

OBJECT CREATION

Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

In This Application We Use 5 Custom Objects:

1. Semester
2. Candidate
3. Course Detail
4. LecturerDetail
5. Internal Result

Creation Of Semester Object For Candidate Internal Result Card

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** And Click Save.

In the same way create **4** more objects as **Candidate**, **Course Detail**, **Lecturer Detail** and **Internal result**.

The screenshot shows the Salesforce Setup interface with the title 'SETUP > OBJECT MANAGER Semester'. On the left, a sidebar titled 'Details' lists various setup categories. The main area is titled 'Edit Custom Object Semester' and contains a 'Custom Object Definition Edit' form. The 'Custom Object Information' section includes fields for 'Label' (Semester), 'Plural Label' (Semesters), and 'Object Name' (Semester). A note at the top of this section cautions: 'Be careful when changing the name or label as it may affect existing integrations and merge templates.' There is also a checkbox for 'Starts with vowel sound'. Below this is a 'Description' text area.

The screenshot shows the Salesforce Setup interface with the title 'SETUP > OBJECT MANAGER Candidate'. The left sidebar is identical to the previous screen. The main area is titled 'Edit Custom Object Candidate' and contains a 'Custom Object Definition Edit' form. The 'Custom Object Information' section includes fields for 'Label' (Candidate), 'Plural Label' (Candidates), and 'Object Name' (Candidate). A note at the top of this section cautions: 'Be careful when changing the name or label as it may affect existing integrations and merge templates.' There is also a checkbox for 'Starts with vowel sound'. Below this is a 'Description' text area.

The screenshot shows the Salesforce Setup interface with the URL <https://saandboxcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5h0000027ZR0/edit?address=%2F01I5h0000027ZR0%2Fe%3F...>. The page title is "Course Detail". The left sidebar under "SETUP > OBJECT MANAGER" lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Edit Custom Object Course Detail" and contains the "Custom Object Definition Edit" form. The "Custom Object Information" section includes fields for "Label" (Course Detail), "Plural Label" (Course Details), and "Object Name" (Course_Detail). A note states: "The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates." A "Description" field is also present.

The screenshot shows the Salesforce Setup interface with the URL <https://saandboxcom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5h0000027ZRA/edit?address=%2F01I5h0000027ZRA%2Fe%3F...>. The page title is "Internal result". The left sidebar under "SETUP > OBJECT MANAGER" lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Edit Custom Object Internal result" and contains the "Custom Object Definition Edit" form. The "Custom Object Information" section includes fields for "Label" (Internal result), "Plural Label" (Internal results), and "Object Name" (Internal_result). A note states: "The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates." A "Description" field is also present.

Tabs:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

- A. Standard Object Tabs: Standard object tabs display data related to standard objects
- B. Custom Object Tabs: Custom object tabs displays data related to custom objects.
- C. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
- D. Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

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 URL <https://saandboxcom-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home>. The left sidebar has a search bar and navigation links for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'Custom Tabs' and contains two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section lists tabs for 'Candidates', 'Course Details', 'Internal results', 'Lecturer Details', and 'Semesters', each with a 'Tab Style' icon (e.g., People, Laptop, Square) and a 'Description' column. A 'Help for this Page' link is in the top right.

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.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Candidates	People	
Edit Del	Course Details	Laptop	
Edit Del	Internal results	Square	
Edit Del	Lecturer Details	People	
Edit Del	Semesters	Headset	

Web Tabs

New What Is This?

<https://saandboxcom-dev-ed.lightning.force.com/one/one.app#/setup/CustomTabs/home>

The screenshot shows the Salesforce Setup interface with the URL <https://saandboxcom-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5h000000Z4gT%2Fe%3FretURL%3D%2F01r5h000000Z4gT%2F&retURL=%2F01r5h000000Z4gT%2F&retLabel=Custom%20Object%20Tab%20Candidates>. The left sidebar is identical to the previous screenshot. The main content area is titled 'Edit Custom Object Tab Candidates' and contains a 'Custom Tab Definition Edit' form. The 'Custom Object Tab Information' section shows 'Tab Label' as 'Candidates', 'Object' as 'Candidate', and 'Tab Style' as 'People'. A note says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' Below it is a 'Splash Page Custom Link' dropdown set to 'None'. A 'Description' field is present at the bottom.

Edit Custom Object Tab
Candidates

Fill in the fields below to define the custom tab.

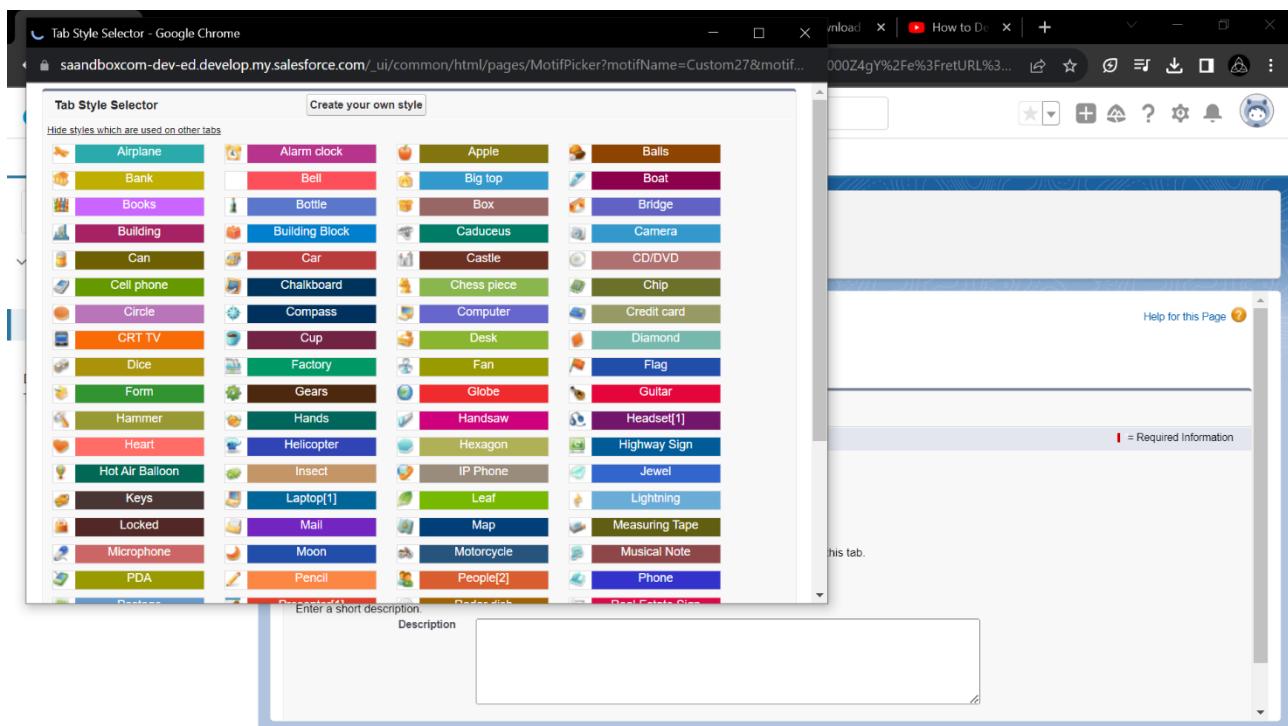
Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Candidates
Object: Candidate
Tab Style: People

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: --None--

Enter a short description.
Description:



The screenshot shows the 'Tabs' setup page in Salesforce Lightning. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. Under 'User Interface', 'Tabs' is selected. The main content area is titled 'SETUP Tabs'. It contains several sections:

- Internal results**: Shows three tabs: 'square' (Internal results), 'People' (Lecturer_Details), and 'Headset' (Semesters).
- Web Tabs**: Shows a message: 'No Web Tabs have been defined'.
- Visualforce Tabs**: Shows a message: 'No Visualforce Tabs have been defined'.
- Lightning Component Tabs**: Shows a message: 'No Lightning component tabs have been defined'.
- Lightning Page Tabs**: Shows a table with one row for 'Candidate App.page'. The table columns are 'Action', 'Label', 'Tab Style', and 'Description'. The 'Label' column shows 'Candidate App.page', the 'Tab Style' column shows 'Presenter' (with an icon), and the 'Description' column shows 'Created by Lightning App Builder'.

CHAPTER - 4

LIGHTNING APP

Lightning App:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Standard apps: Standard apps come with every occurrence of Salesforce as default. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

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 , Reports, and Dashboards and move them to Selected Items. Click Next.

The screenshot shows the 'Lightning App Builder' interface with the URL <https://saandboxcom-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u5h000000kWUIAAM&retUrl=https%3A%2F%2Fsandboxcom...>. The left sidebar has 'App Settings' selected, and the main area shows the 'App Details & Branding' tab. The 'App Details' section contains fields for 'App Name' (Candidate Internal Result Card), 'Developer Name' (Candidate_Internal_Result_Card), and 'Description' (Enter a description...). The 'App Branding' section includes an 'Image' upload field, a color picker set to #0070D2, and a checkbox for 'Org Theme Options'. An 'App Launcher Preview' shows a blue square with 'CI' and the app name.

7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

The screenshot shows the 'Lightning App Builder' interface with the URL <https://saandboxcom-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u5h000000kWUIAAM&retUrl=https%3A%2F%2Fsandboxcom...>. The left sidebar has 'App Settings' selected, and the main area shows the 'App Options' tab. The 'Navigation and Form Factor' section includes 'Navigation Style' (Standard navigation selected) and 'Supported Form Factors' (Desktop and phone selected). The 'Setup and Personalization' section includes 'Setup Experience' (Setup (full set of Setup options) selected) and 'App Personalization Settings' (checkboxes for 'Disable end user personalization of nav items in this app' and 'Disable temporary tabs for items outside of this app').

The screenshot shows the Lightning App Builder interface with the URL <https://saandboxcom-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u5h00000kWUIAAM&retUrl=https%3A%2F%2Fsandboxcom...>. The left sidebar has 'App Settings' selected. Under 'Navigation Items', 'User Profiles' is selected. The main area is titled 'Navigation Items' and contains two sections: 'Available Items' and 'Selected Items'. The 'Available Items' section lists various navigation items with icons: Accounts, Alert Settings, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, and Appointment Invitations. The 'Selected Items' section contains: Semesters, Candidate App page, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. Navigation arrows between the two sections allow items to be moved.

The screenshot shows the Lightning App Builder interface with the same URL as the previous screenshot. The left sidebar has 'User Profiles' selected. The main area is titled 'User Profiles' and contains two sections: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' section lists: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, Custom: Sales Profile, and Custom: Support Profile. The 'Selected Profiles' section contains: System Administrator. Navigation arrows between the two sections allow profiles to be moved.

To verify your changes, click the App Launcher, type School Management and select the School Management app.

Note:

- App Launcher-Displays available apps.
- App Name-Displays the current selected app.
- Navigation menu -Displays the tabs available inside the app.

CHAPTER - 5

FIELDS AND RELATIONSHIP

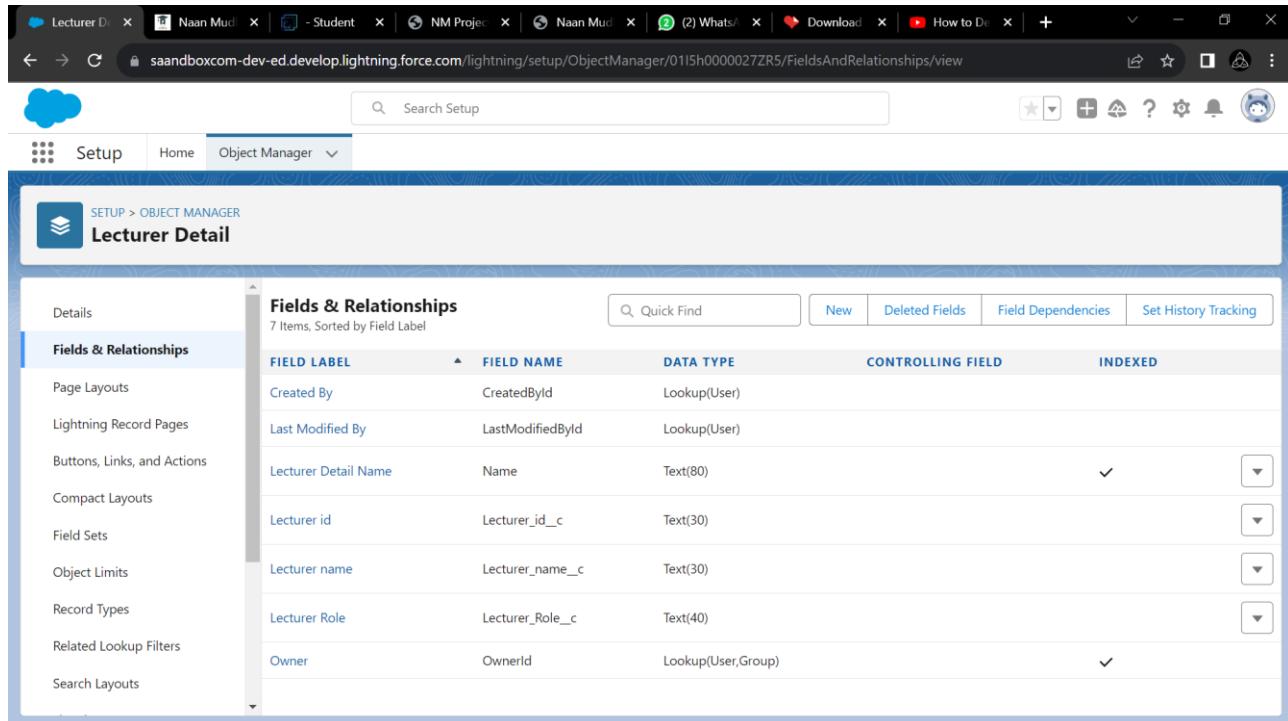
Fields and Relationship:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

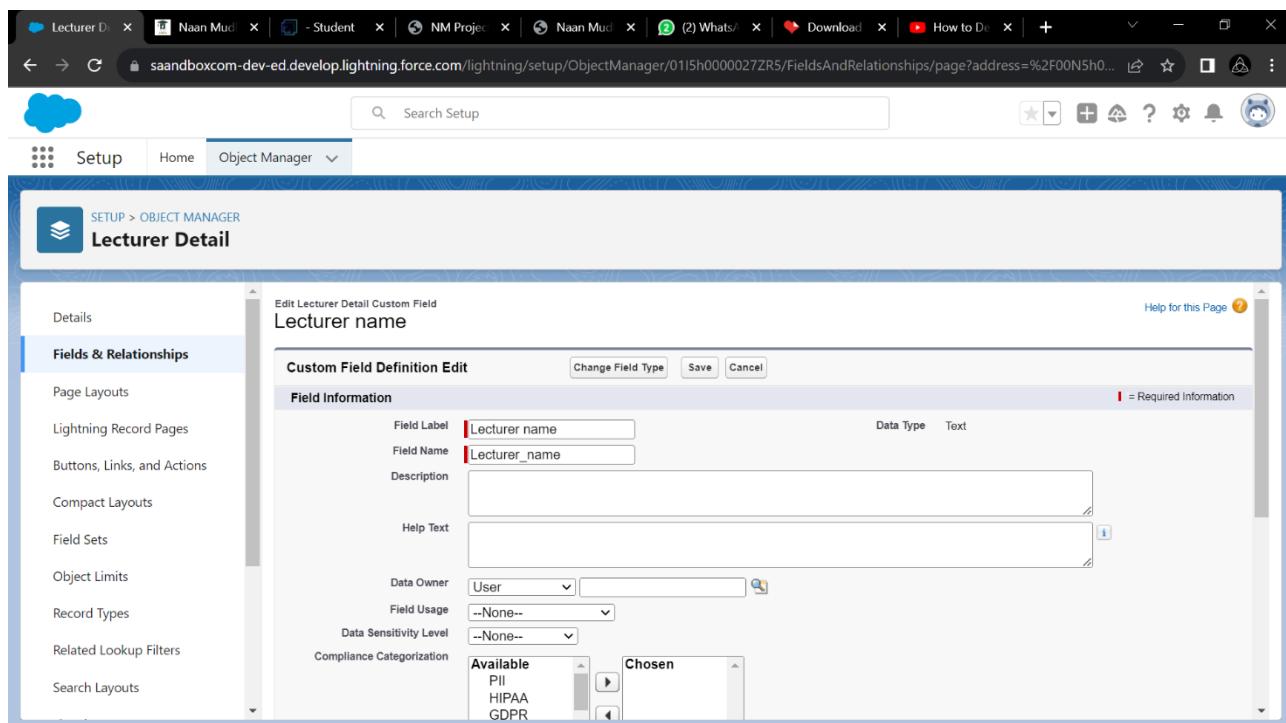


The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section selected. The main area displays a table titled 'Fields & Relationships' with 7 items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecturer Detail Name	Name	Text(80)		✓
Lecturer id	Lecturer_id_c	Text(30)		▼
Lecturer name	Lecturer_name_c	Text(30)		▼
Lecturer Role	Lecturer_Role_c	Text(40)		▼
Owner	OwnerId	Lookup(User,Group)		✓

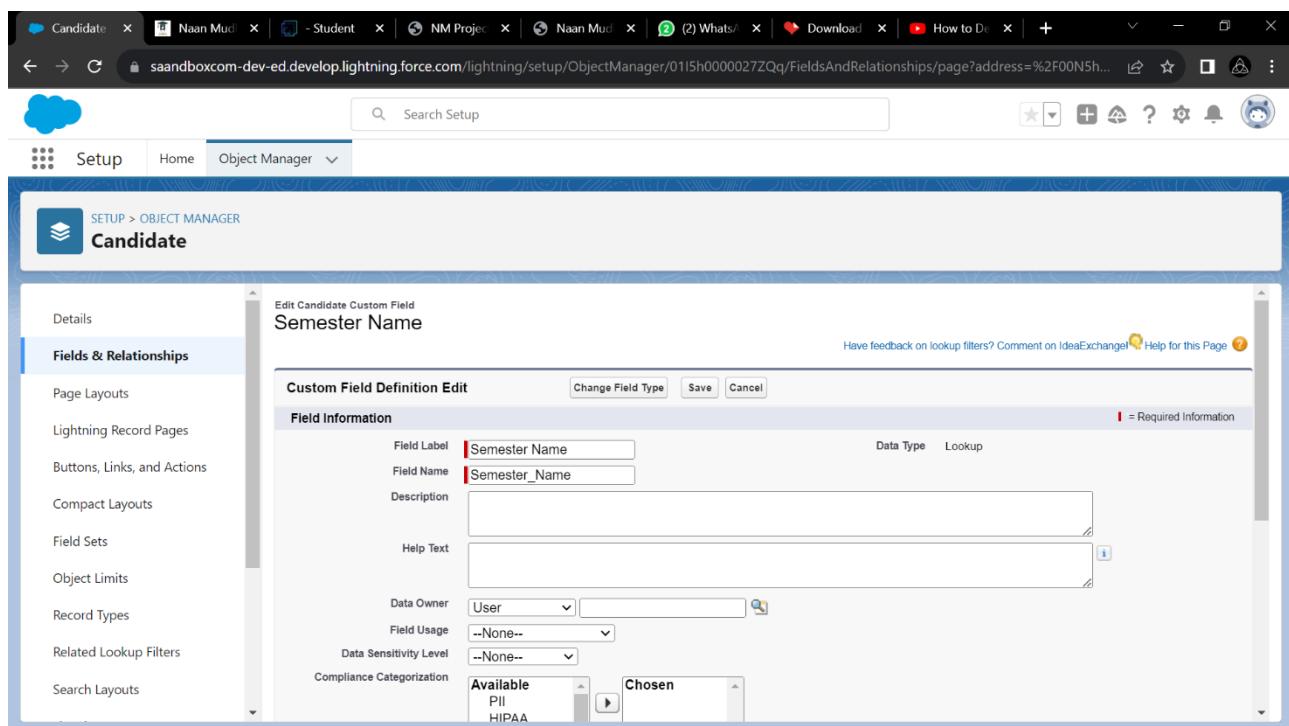
Creation Of Text Field for The “LecturerDetails” Object

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.



Lookup field on candidate object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the lookup as the Data Type, then click Next.
7. In related select Semester
8. For Field Label **Semester Name**, enter.
9. Click Next, Next, then Save & New



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

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
10. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Candidate, Naan Mud, Student, NM Project, Naan Mud, WhatsApp, Download, How to Do, and a search bar labeled 'Search Setup'. Below the navigation is a toolbar with various icons. The main area displays the 'Object Manager' for the 'Candidate' object. On the left, a sidebar lists options like Details, 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 'Fields & Relationships' option is selected. The right pane shows the 'Edit Candidate Custom Field' page for 'Candidate Roll Number'. The 'Field Information' section contains the following details:

- Field Label: Candidate Roll Number
- Field Name: Candidate_Roll_Number
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization: Available (PII, HIPAA, GDPR) and Chosen

At the bottom of the page are 'Change Field Type', 'Save', and 'Cancel' buttons, along with a 'Help for this Page' link.

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**, and then click Insert.
- 11) Click Next, Next, then Save.

The screenshot shows the Salesforce Setup interface for the 'Candidate' object. The left sidebar lists various setup categories under 'Fields & Relationships'. The main panel displays the 'Edit Candidate Custom Field' screen for 'Candidate Roll Number'. The 'Field Information' section includes fields for 'Field Label' (Candidate Roll Number), 'Field Name' (Candidate_Roll_Number), 'Data Type' (Auto Number), 'Description', 'Help Text', 'Data Owner' (User), 'Field Usage' (None), 'Data Sensitivity Level' (None), and 'Compliance Categorization' with options for Available (PII, HIPAA, GDPR) and Chosen (PCI).

The screenshot shows the formula editor for the 'Candidate Roll Number' field. The 'Formula Options' section has 'Text' selected as the 'Formula Return Type'. The formula input field contains 'Candidate__r.Candidate_Roll_Number__c'. A 'Simple Formula' tab is active. To the right, there are sections for 'Quick Tips' (Getting Started, Operators & Functions) and a list of available functions including ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, with an 'Insert Selected Function' button.

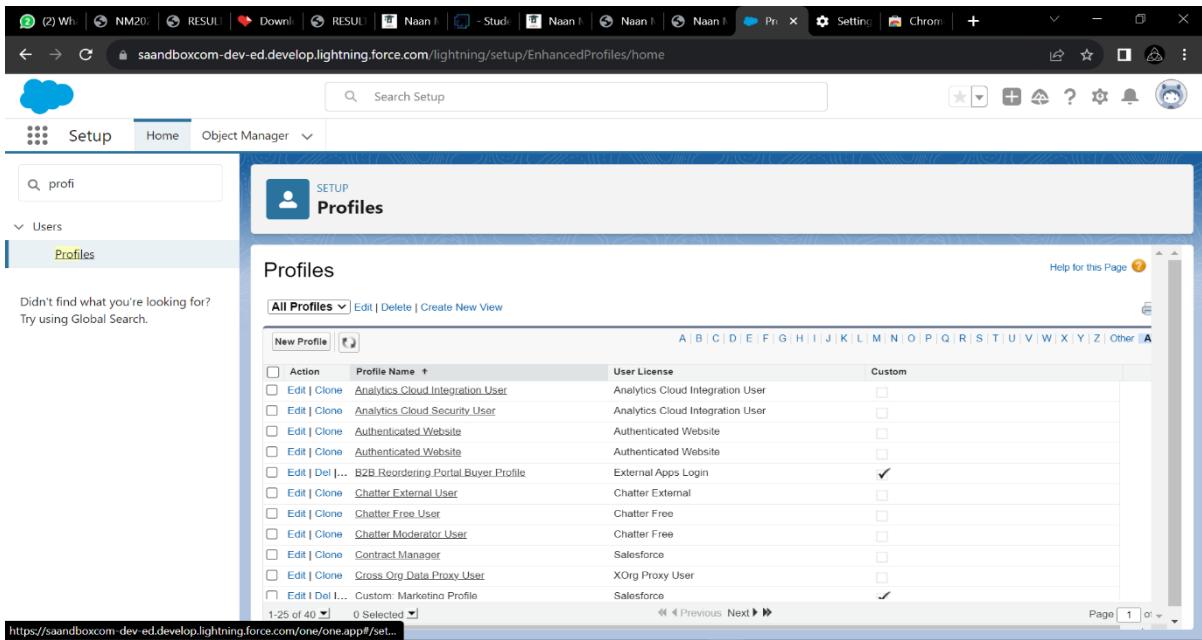
CHAPTER - 6

CREATION ON PROFILE

Creation on profile:

Profile:

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.



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

- Header:** The URL is saandboxcom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home. The browser tabs show "Setup" and "Chrom".
- Left Navigation:** Includes "Cloud", "Setup", "Home", and "Object Manager".
- Search Bar:** Contains "Search Setup" and a search icon.
- Page Header:** "SETUP" and "Profiles".
- Page Content:** "Profiles" section with a table listing profiles. The table includes columns for Action, Profile Name, User License, and Custom.
- Table Data:**

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
- Page Bottom:** Shows the URL <https://saandboxcom-dev-ed.develop.lightning.force.com/one/one.app#/set...>, a page number "Page 1 of 1", and navigation icons.

The screenshot shows the Salesforce Setup Profiles - Clone Profile page. The URL is saandboxcom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Ui%2Fprofile%2FProfileClone%2.... The page title is "Clone Profile". A search bar at the top right contains "Search Setup". The left sidebar has "Setup" selected, along with "Home" and "Object Manager". A search bar in the sidebar has "prof" typed. Under "Profiles", it says "Didn't find what you're looking for? Try using Global Search." The main content area has a heading "Clone Profile" and a sub-instruction "Enter the name of the new profile." Below this is a form with a required field "Existing Profile" set to "System Administrator". Other fields include "User License" (Salesforce) and "Profile Name" (empty). At the bottom are "Save" and "Cancel" buttons.

The screenshot shows the Salesforce Setup Users - All Users page. The URL is saandboxcom-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home. The page title is "All Users". A search bar at the top right contains "Search Setup". The left sidebar has "Setup" selected, along with "Home" and "Object Manager". A search bar in the sidebar has "Quick Find" typed. The main content area has a heading "All Users" and a sub-instruction "On this page you can create, view, and manage users." Below this is a table showing user details. The table columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. The table rows show the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A_User	ua	ua14@gmail.com	VP_Marketing	<input checked="" type="checkbox"/>	Marketing User
<input type="checkbox"/> Edit	B_User	ub	ub07@gmail.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	chatty	00d5h000008o6kceak.bnrukymva071@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	K_PRAVEEN ESWAR	PK	2k20t25@saandbox.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Teacher_Class	cteac	praveeneswar1462003@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5h000008o6kceak.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5h000008o6kceak.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

CHAPTER - 7

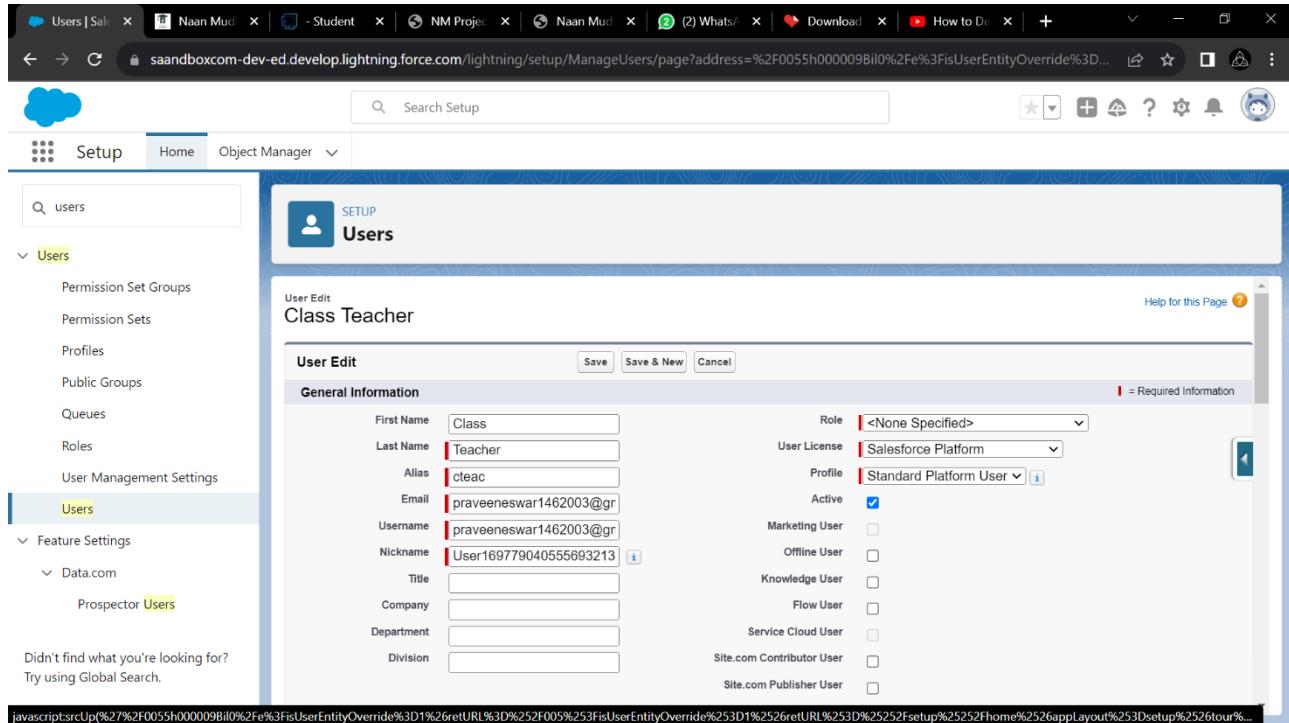
CREATING A USER

Creating A User:

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user's name Class and (Your) email address and a unique username in the form of an email address.
5. By default, the username is the same as the email address.
6. Select a User License as salesforce.
7. Select a profile as a School profile.
8. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

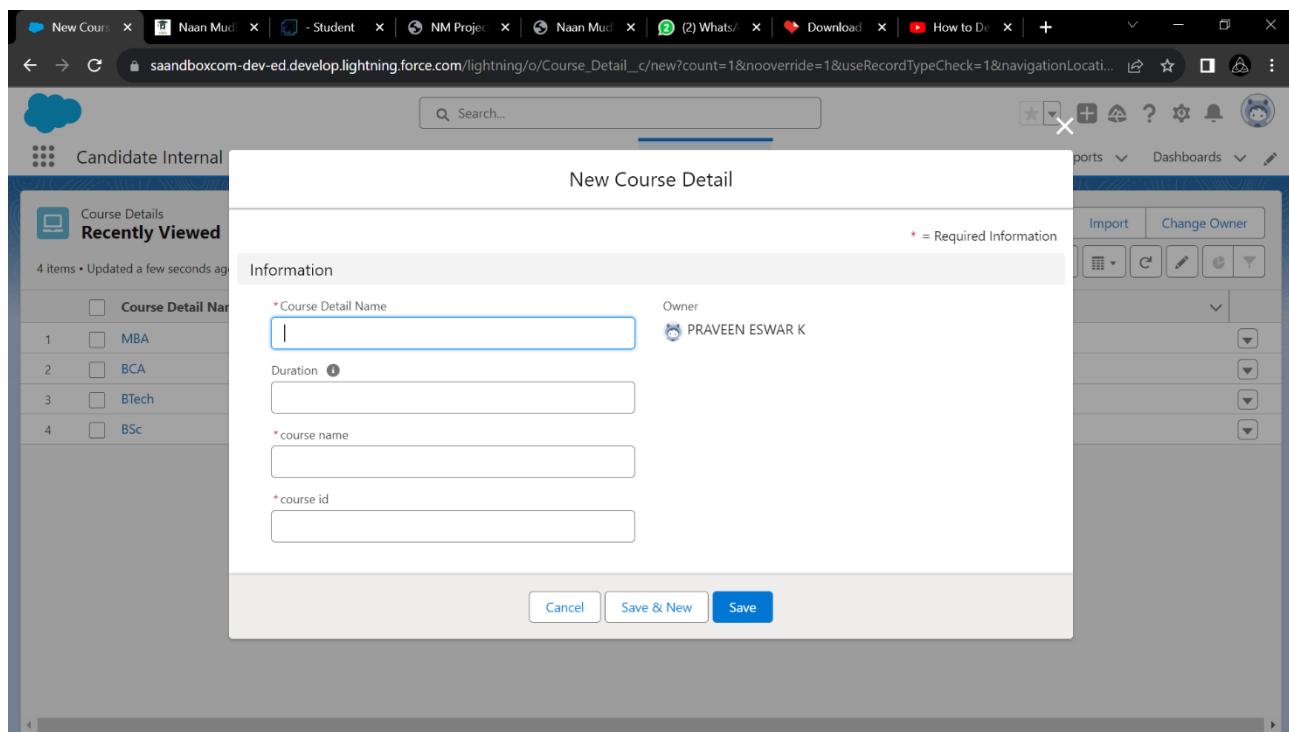
The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for various users like 'A_User', 'B_User', 'Chatter_Expert', etc., each with their respective details and status.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A_User	ua	ua14@gmail.com	VP_Marketing	<input checked="" type="checkbox"/>	Marketing User
<input type="checkbox"/> Edit	B_User	ub	ub07@gmail.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d5h000008o6kceak.bnwukymva07i@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	K_PRAVEEN_ESWAR	PK	2k20l125@saandbox.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Teacher_Class	cteac	praveeneswar1462003@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5h000008o6kceak.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5h000008o6kceak.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User



Create Record (Course Details)

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.



View Record (Course Details)

1. Click on App Launcher on left side of screen.
2. Search **Candidate Internal Result Card** & click on it.
3. Click on **Course details** Tab.
4. Click on any record name. you can see the details of the Driver.

The screenshot shows a Salesforce Lightning interface with the URL saandboxcom-dev-ed.lightning.force.com/lightning/o/Course_Detail_c/list?filterName=Recent. The page title is "Candidate Internal ...". The top navigation bar includes links for Semesters, Candidate App page, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. A search bar at the top right contains the placeholder "Search...". Below the navigation is a "Recently Viewed" section for "Course Detail Name". It lists four items: 1. MBA, 2. BCA, 3. BTech, and 4. BSc. Each item has a checkbox and a downward arrow icon. To the right of the list are buttons for "New", "Import", and "Change Owner". Below the list is a search bar with the placeholder "Search this list..." and a set of filter and sort icons.

Delete Record (Course Details)

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.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Recently Viewed | Course Detail" and has the URL knowledgeinstituteoftech35-dev-ed.develop.lightning.force.com/lightning/o/Course_Detail_c/list?filterName=Recent. The page displays a list of course details under the heading "Recently Viewed". The list includes:

	Course Detail Name
1	B.tech
2	BE
3	BCA
4	Bsc
5	MBA

On the right side of the list, there is a context menu with options: "Edit", "Delete", and "Change Owner". The browser interface includes a search bar at the top, navigation buttons, and a header with various links like "Candidate Internal ...", "Semesters", "Candidate App page", etc.

CHAPTER - 8

Reports

Reports:

Reports in Salesforce is a list of records that meet a particular criterion which gives a particular question. These records are displayed as a table that can be filtered or grouped based on the report they can find any field in the report.

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.

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.

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

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type.

1.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.

Custom Report Types:

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. 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.

Create Report:

Reports:

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 **Startreport**.
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 objectyou selected for reporting (What you Selects in “Select a report type option”).

The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes tabs for 'Naan Mudhal', 'Report Builder', 'Implementing', 'Remove Sub...', and others. The main title is 'Candidate Internal ...' under the 'REPORT' section. Below the title, there's a search bar and various navigation links like 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. A message at the top says 'Previewing a limited number of records. Run the report to see everything.' On the left, there's a sidebar titled 'Fields' with sections for 'Groups' (containing 'GROUP ROWS' and 'Add group...') and 'Columns' (containing 'Candidate: Candidate Name', 'Course id', 'Internal result: Internal result Name', and '# Marks'). The main content area displays a table with the following data:

	Candidate: Candidate Name	Course id	Internal result: Internal result Name	Marks
1	Mary	EC147	GIS	92
2	Tony	EC147	GIS	96
3	Benjamin	EC147	GIS	87
4	Wanda	EC147	GIS	68
5	John	EC147	GIS	78

At the bottom right of the table, there's a checkbox for 'Update Preview Automatically' which is checked.

CHAPTER - 9

TRIGGERS

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 get the chance for an automate business processes.

A before trigger in Salesforce is executed before the records are actually inserted, updated, or deleted in the Salesforce database. This allows the trigger to perform certain actions or validations before the data is saved to the database.

Create An Apex 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

```
public class InternalmarksHandler {  
    public static void beforeinsert(list<Internal_result__c >  
        newlist){  
  
        for(Internal_result__c internalmarks : newlist){  
            if(internalmarks.marks__c >= 200){
```

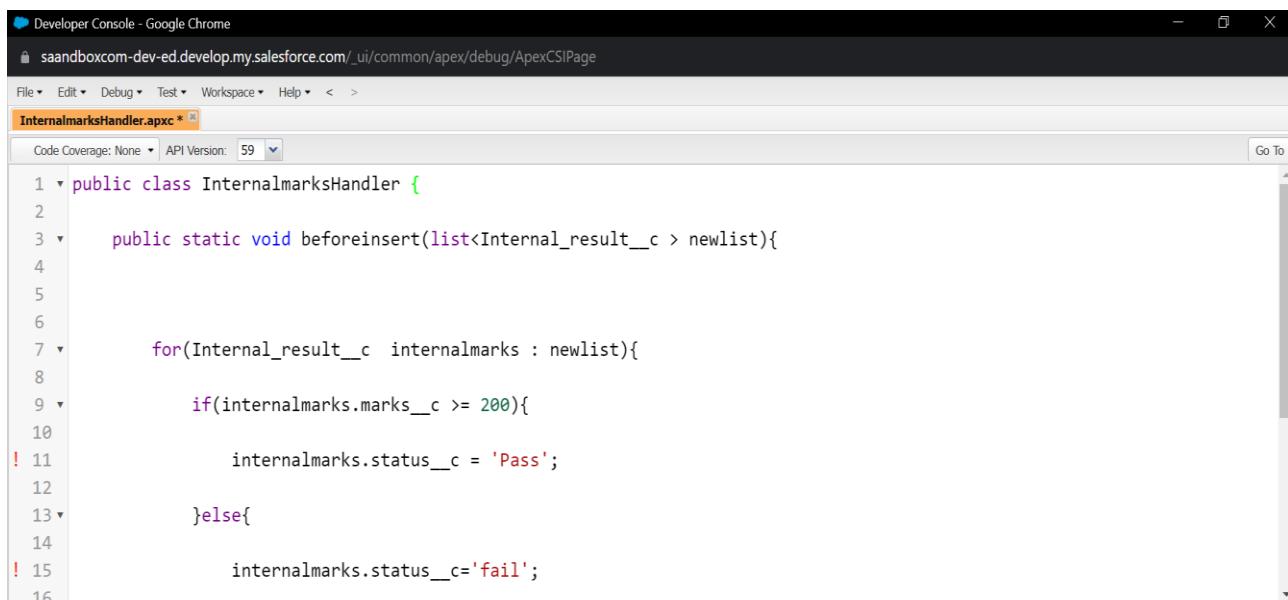
```

        internalmarks.status__c = 'Pass';
    }else{
        internalmarks.status__c='fail';
    }

}

}

```



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is saandboxcom-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab title is "InternalmarksHandler.apxc". The code editor displays the following Apex class:

```

1 public class InternalmarksHandler {
2
3     public static void beforeinsert(list<Internal_result__c > newlist){
4
5
6         for(Internal_result__c internalmarks : newlist){
7
8             if(internalmarks.marks__c >= 200){
9
10                 internalmarks.status__c = 'Pass';
11
12             }else{
13
14                 internalmarks.status__c='fail';
15
16

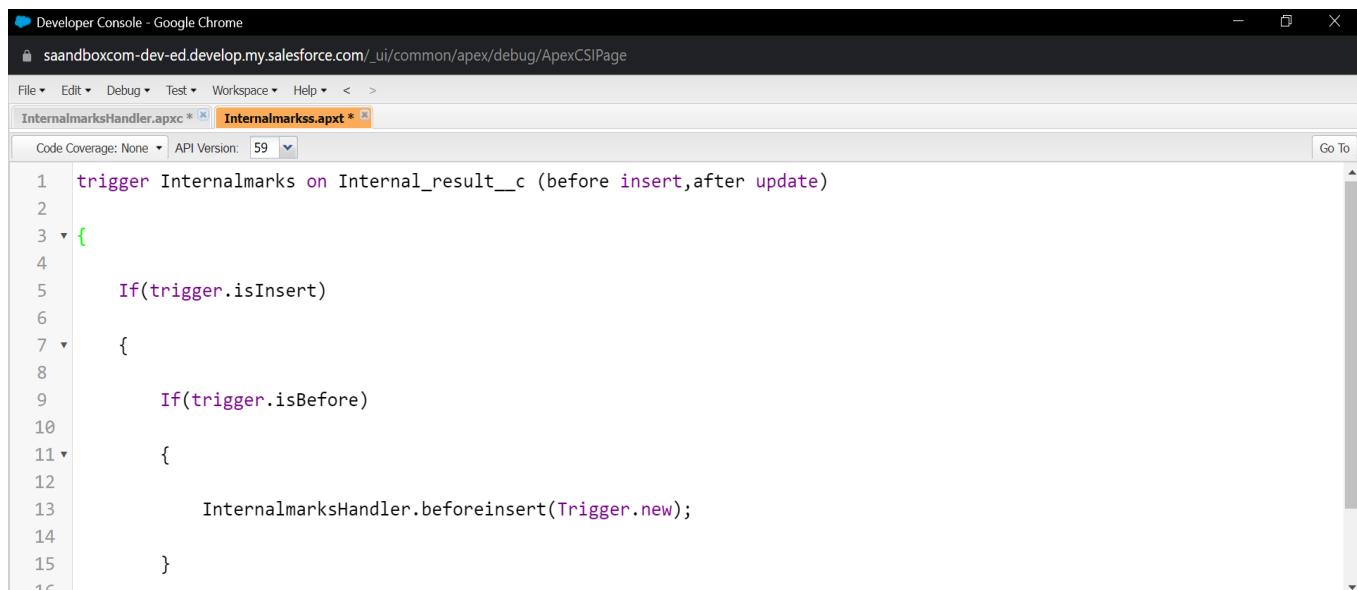
```

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

```
trigger Internalmarks on Internal_result__c (before insert,after update)
{
    If(trigger.isInsert)
    {
        If(trigger.isBefore)
        {
            InternalmarksHandler.beforeinsert(Trigger.new);
        }
    }
}
```



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is saandboxcom-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tabs at the top show "InternalmarksHandler.apxc" and "Internalmarkss.apxt". The code editor displays the Apex trigger code provided in the previous text block. The code is syntax-highlighted, with "trigger" in blue, "Internalmarks" in purple, and "Internal_result__c" in green. The "File Coverage" dropdown is set to "None" and the "API Version" is set to "59". A "Go To" button is visible on the right side of the editor.

```
trigger Internalmarks on Internal_result__c (before insert,after update)
{
    If(trigger.isInsert)
    {
        If(trigger.isBefore)
        {
            InternalmarksHandler.beforeinsert(Trigger.new);
        }
    }
}
```

CHAPTER - 10

FLows

Flows:

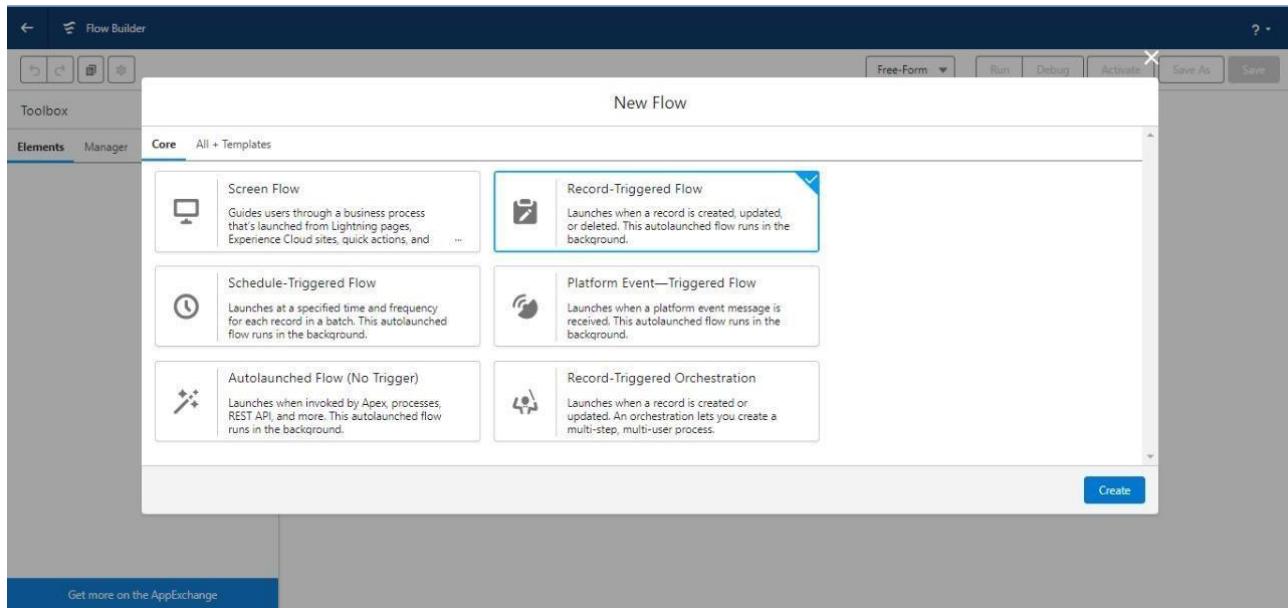
Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language.

Flows fall into five categories:

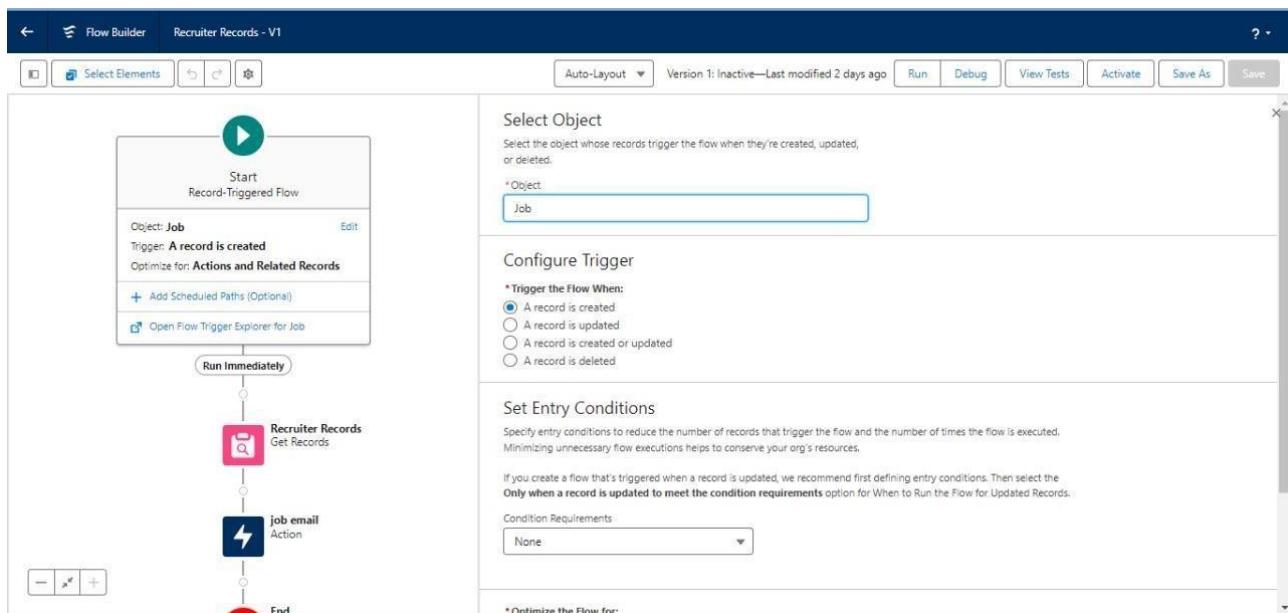
- 1.Screen Flows
- 2.Schedule- Flows
- 3.Autolaunched Flows
- 4.Record-Triggered Flows
- 5.Platform Event-Triggered Flows

1)Create A Record Trigger Flow on Job Object

- 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 Record triggered Flows.



4. In the search bar type job and click done.



4. Add an element called Get record.
6. Label name as Recruiter Records.
7. Select the object as Recruiter.
8. After entering the object follow the steps.
10. Conditional requirements should be all conditions are met (AND).
11. Select the field as Recruiter_Email__c.
12. Operation should be Is Null.
13. Value should be False. And click done.

Edit Get Records
Recruiter Records (Recruiter_Records)

Get Records of This Object

* Object: Recruiter

Filter Recruiter Records

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
Email__c	Is Null	<input checked="" type="checkbox"/> False

Add Condition

Sort Recruiter Records

Sort Order: Not Sorted

⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

Only the first record
 All records

How to Store Record Data

Automatically store all fields
 Choose fields and let Salesforce do the rest
 Choose fields and assign variables (advanced)

14. Add another element called Action.

15. Click on the Action and start creating new action

16. Select the action as Send Email.

16. Enter the label name job email, API name is auto populated.

17. Set input values as

a. Body: { !\$Record.Name } with

{ !\$Record.Job_Application_Id__c } is available. Please find the suitable candidates for the position.

b. Subject: { !\$Record.Name }

18. Recipient Email Addresses (comma-separated) should be included for that turn it on.

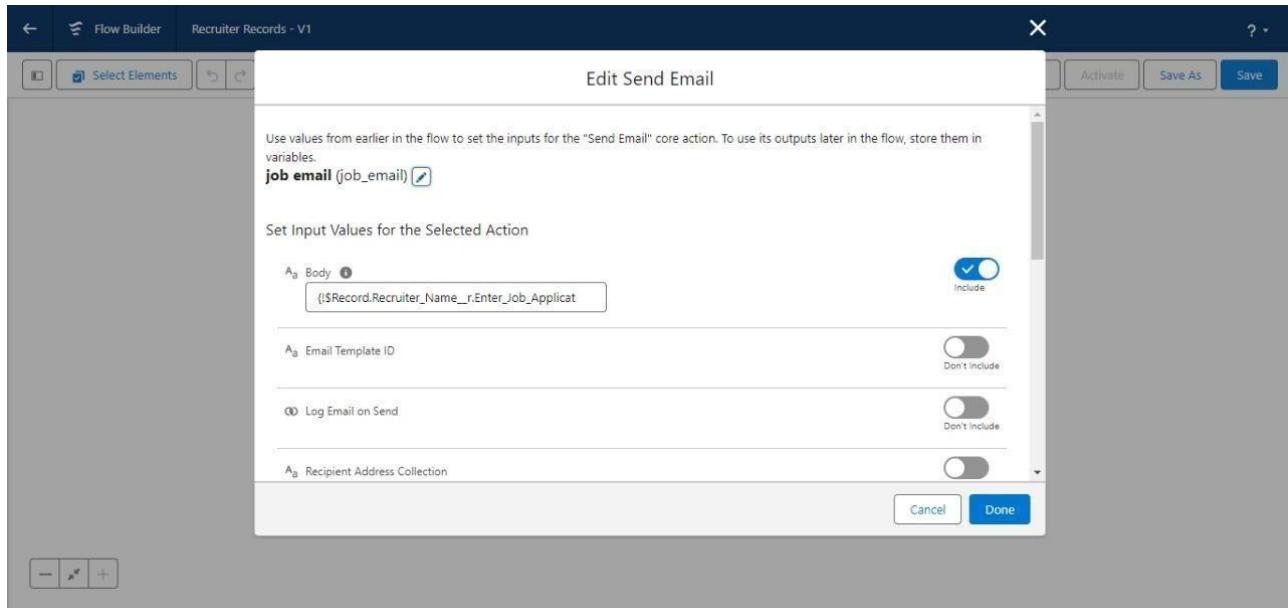
19. Recipient Email Addresses:

{ !\$Record.Recruiter_Name_____r.Recruiter_Email__c }

20. Click on done.

21. After the completion of flow, check whether the flow is running and click save.

22. And Activate the flow.



2)Create Another 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 Flows.
4. Add an element called screen.
- 5.Screen label should be Candidate details.
- 6.API name is auto populated.
- 7.Add the components in canvas.
- 8.Select the text from the components.
- 9.Label name as Candidate name.
10. API name is auto populated.
11. Select the text area from the components.
- 12.Label name as Address.

13. API name is auto populated.

14. Select the email from the components.

15. Label name as Email.

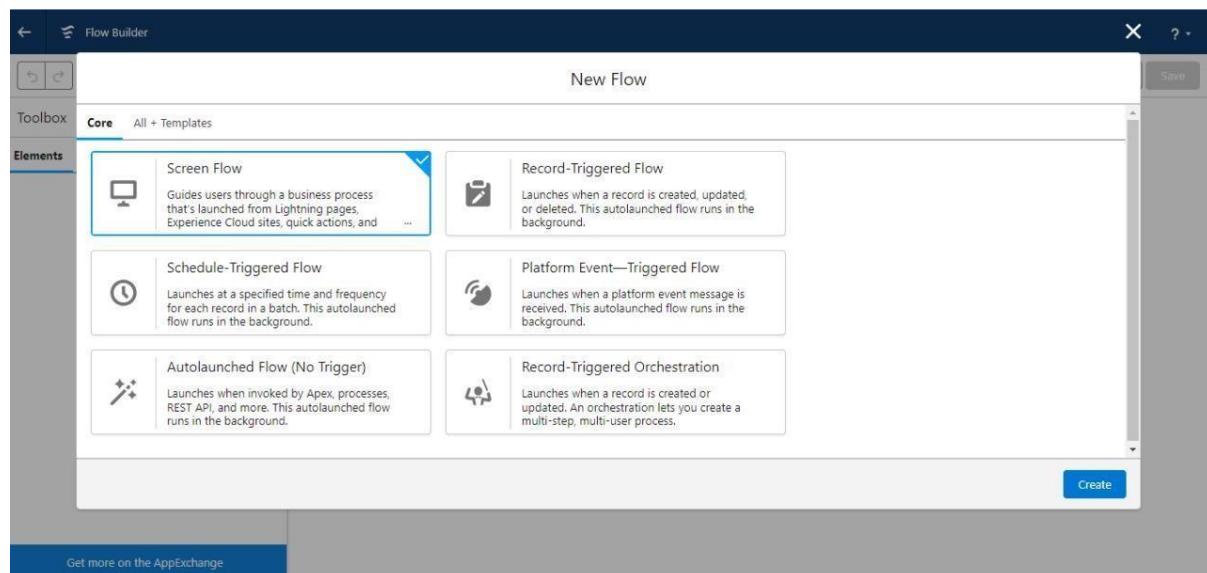
16. API name is auto populated.

17. Select the Phone from the components.

18. Label name as Phone.

19. API name is auto populated.

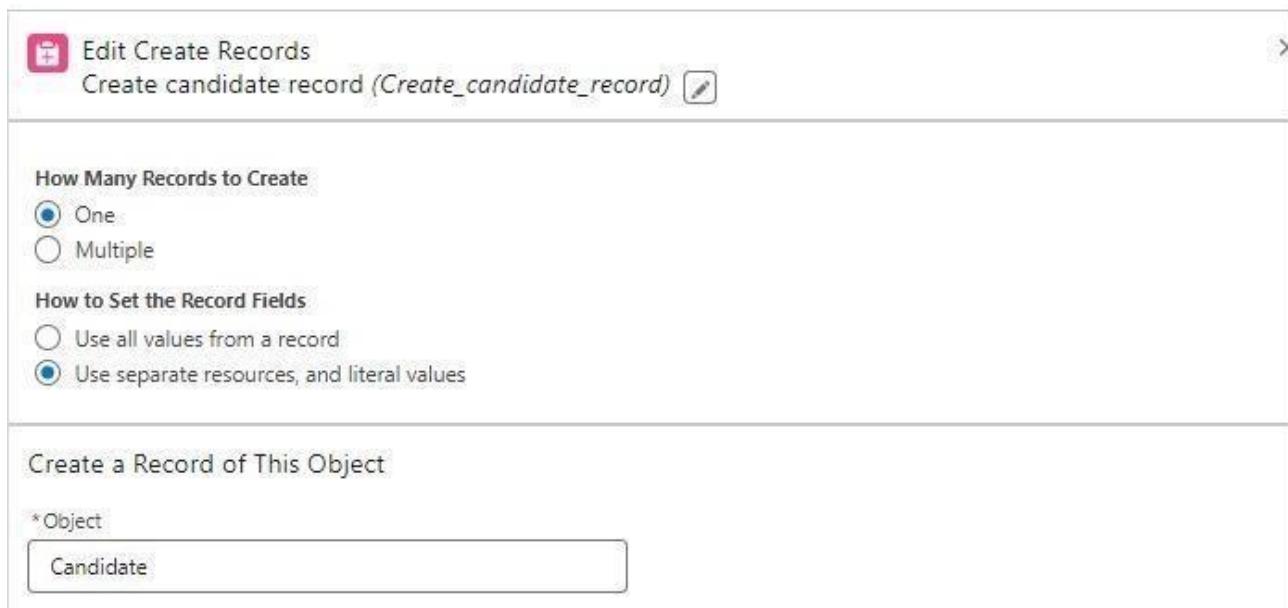
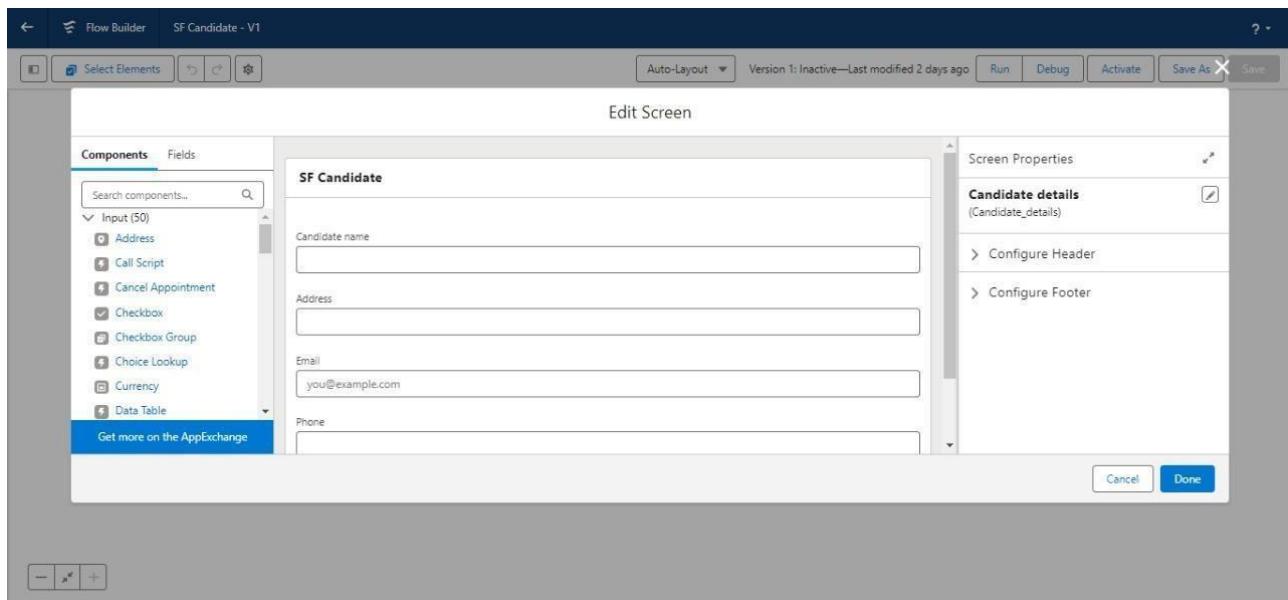
20. Select the picklist from the components.



19. Label name as Education.
20. API name is auto populated.
21. And select the choice as
{ !pick }.
22. Add a header to the canvas candidate flow for job application.
23. Click on save.
24. Next, add another element called create record.
25. Label name should be Create candidate record.
26. API is auto populated. and change the How to Set the Record Fields to Use separate resources, and literal values.
27. Select the object Candidate1.
28. API is auto populated. and change the How to Set the Record Fields to Use separate resources, and literal values.
29. Select the object Candidate1.
30. Set the values for the candidate1 as
31. Field is Address_c and value should be { !Address }.
32. Field is Education_c and value should be
{ !Education }.
33. Field is Email_c and value should be { !Email.value }.
34. Field is Name and value should be
{ !Candidate_name }.
35. After that click on done.

36. Run the flow and check whether the flow is working and click on save.

37. And activate the flow.



Create a Record of This Object

*Object

Candidate

Set Field Values for the Candidate

Field

Address_c	←	Aa Address X	
-----------	---	--------------	---

Field

Education_c	←	Graduation	
-------------	---	------------	---

Field

Email_c	←	{!Email}	
---------	---	----------	---

Field

Name	←	Aa Candidate_name X	
------	---	---------------------	--

 Add Field

Manually assign variables

CHAPTER - 11

DASHBOARDS

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're readable to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

Create Dashboard

1. Click on Dashboards tab from the **Candidate Internal Result Card** application.
2. Click on new dashboard.
3. Give name- **Candidate Internal Result Card**
4. Click create
5. Give your dashboard a name and click on +component
6. Select the **Candidate Internal Result Report** which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.

The screenshot shows the Salesforce Report Builder interface. At the top, there are several tabs: 'Naan Mudhal', 'Naan Mudhal', '- Student', 'John | Candid...', 'Report Builder', 'Implementing', 'Remove Sub...', and others. Below the tabs, the page title is 'Candidate Internal ...' and the sub-page title is 'Internal results with Candidate'. The main area displays a table with the following data:

	Candidate: Candidate Name	Course id	Internal result: Internal result Name	Marks
1	Mary	EC147	GIS	92
2	Tony	EC147	GIS	96
3	Benjamin	EC147	GIS	87
4	Wanda	EC147	GIS	68
5	John	EC147	GIS	78

The left sidebar shows 'Fields' with sections for 'Groups' (containing 'GROUP ROWS' and 'Add group...') and 'Columns' (containing 'Candidate: Candidate Name', 'Course id', 'Internal result: Internal result Name', and '# Marks'). There is also a 'Filters' section with a count of 1. At the top right, there are buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'.

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

The screenshot shows a Salesforce Lightning interface. At the top, there are several tabs and a search bar. Below the header, a sidebar on the left lists categories like Dashboards, Recent, DASHBOARDS, FOLDERS, and FAVORITES. The main area displays a single dashboard card titled "Candidate Internal Result Card". The card includes a search bar, a "New Dashboard" button, and a "New Folder" button. The card itself has columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One item is listed: "Candidate Internal Result Card" created by PRAVEEN ESWAR K on 29/10/2023, 10:37 am.

The screenshot shows a Salesforce Lightning report titled "Candidate Internal Result Card". The report header includes a search bar and various navigation buttons. The main content features a chart titled "Candidate Internal Result Report" showing the sum of marks for five candidates: CAD-016 (92), CAD-017 (96), CAD-018 (68), CAD-019 (78), and CAD-020 (87). A link "View Report (Candidate Internal Result Report)" is also present. The right side of the screen shows a large, empty grid area for further data entry or reporting.

CHAPTER - 12

GITHUB & PROJECT VIDEO DEMO LINK

GitHub: <https://github.com/kisshore-sv/naanmuthalvan-Salesforce-NM2023TMID02100-KIOT.git>

Video Demo Link:

<https://drive.google.com/file/d/1or5uw8MSFEnki9ZeUFHOCAKmV8Nm2Vm/view?usp=sharing>