

## PROJECT REPORT ON

### Implementing CRM for Result Tracking of a Candidate with Internal Marks (DEVELOPER) - (Short-term)

Introduction: The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

Milestone 01: Create Salesforce Org Go to

[developers.salesforce.com/Signup](https://developers.salesforce.com/Signup)

Click on sign up.

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

1. First name & Last name –CHITTETI LAVANYA
2. Email –chittetilavanya199@gmail.com
3. Role: Developer
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501

7. Username:[chittetilavanya199@gdcproject.com](mailto:chittetilavanya199@gdcproject.com)

First Name\* CHITTETI

Last Name\* LAVANYA

Email\* chittetilavanya199@gmail.com

Role\* Developer

Company\* GAYATRI DEGREE COLLEGE TIRUPATI

Country/Region\* India

State/Province\* Andhra Pradesh

Postal Code\* 517501

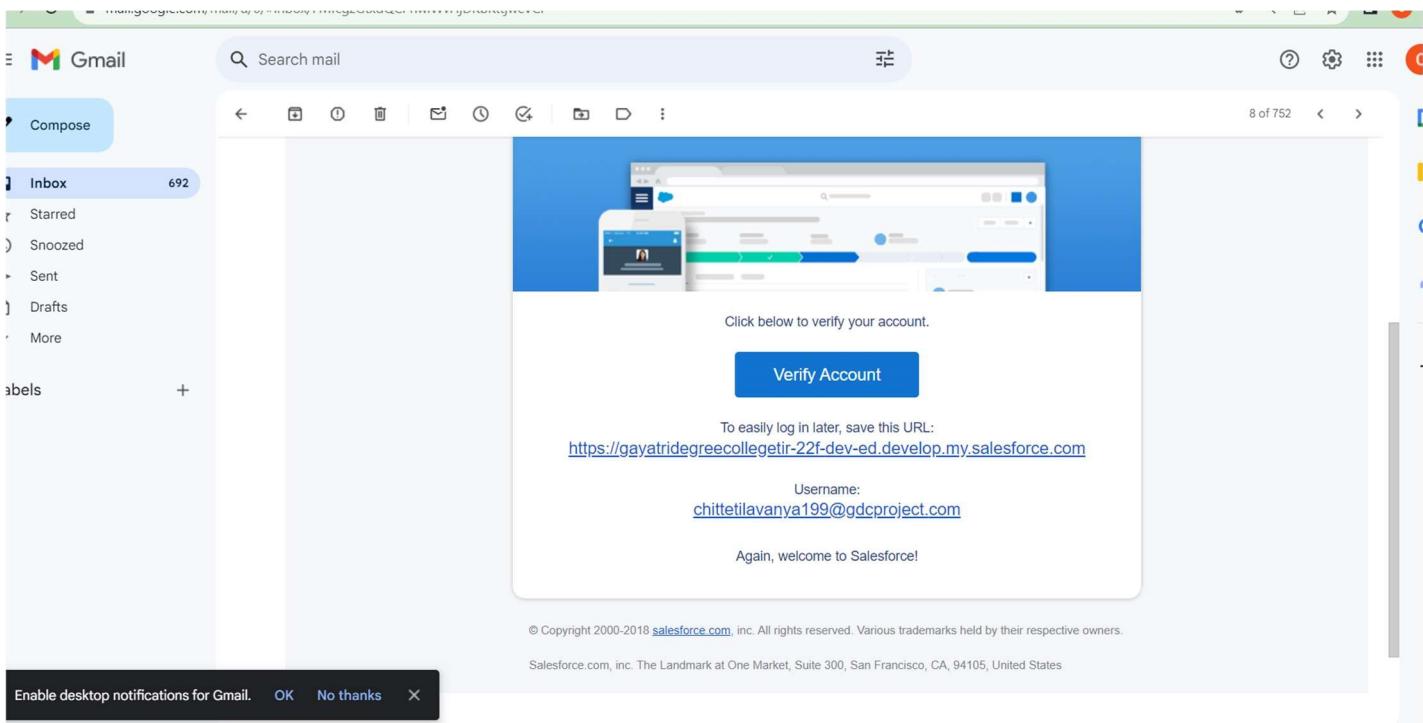
Username\* chittetilavanya199@gdcproject.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

#### 8.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

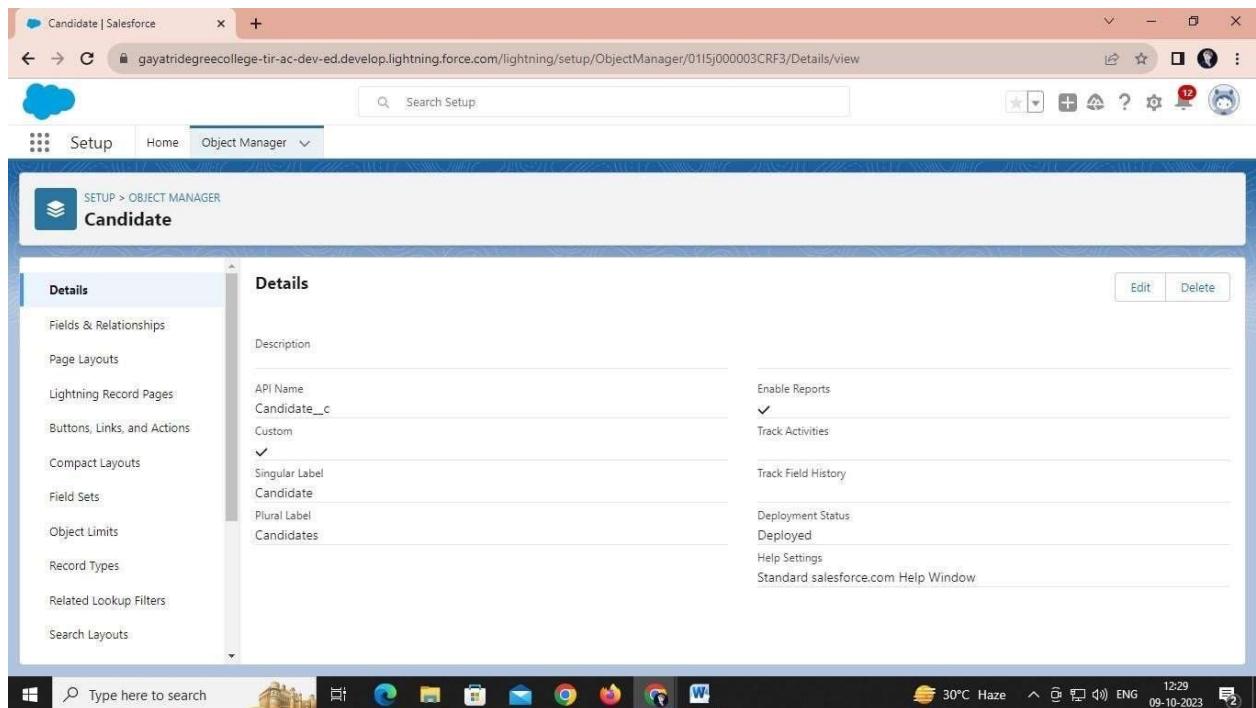
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Semester
6. Plural Label: Semesters
7. Record Name: Semester Name
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save.

The screenshot shows the Salesforce Setup interface for creating a custom object named 'Semester'. The left sidebar contains links for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area displays the 'Details' tab for the 'Semester' object. It shows the API Name as 'Semester\_\_c', the Singular Label as 'Semester', and the Plural Label as 'Semesters'. On the right, there are sections for 'Enable Reports' (unchecked), 'Track Activities' (unchecked), 'Track Field History' (unchecked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right of the main area are 'Edit' and 'Delete' buttons.

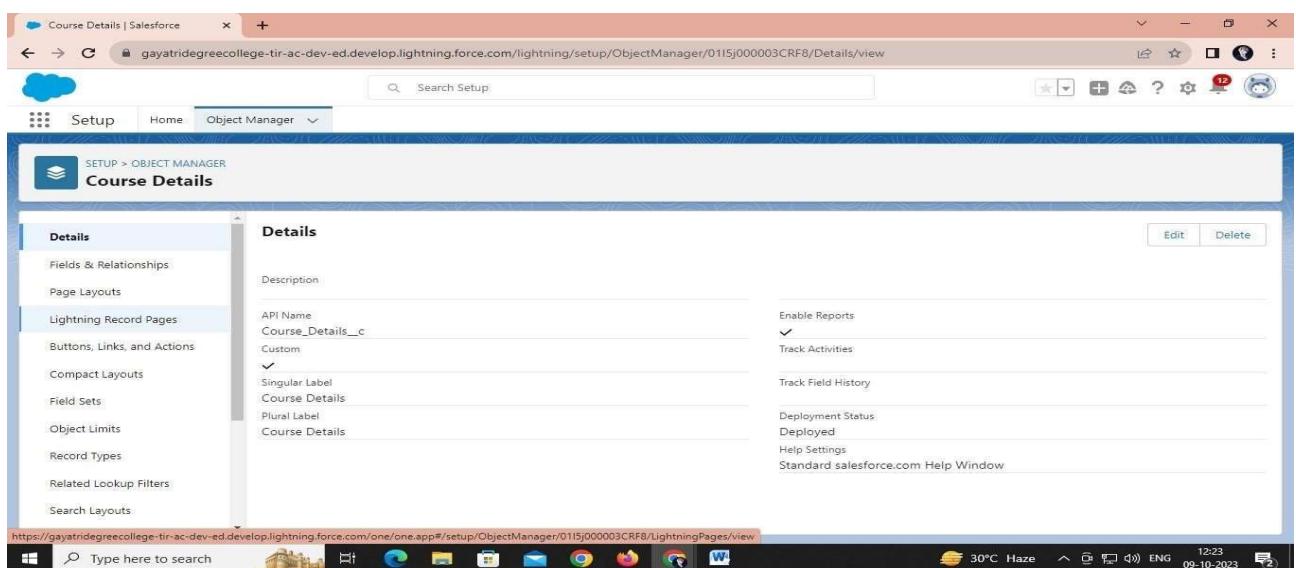
## Object – Candidate

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 Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Candidate
6. Plural Label: Candidates
7. Record Name: Candidate Name
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save



## Object – Course Details

1. Click on the object manager tab just beside the home tab
2. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: Course Details
5. Plural Label: course details
6. Record Name: course details Name
7. Check the Allow Reports
8. Check the Allow Search 9      Click Save.

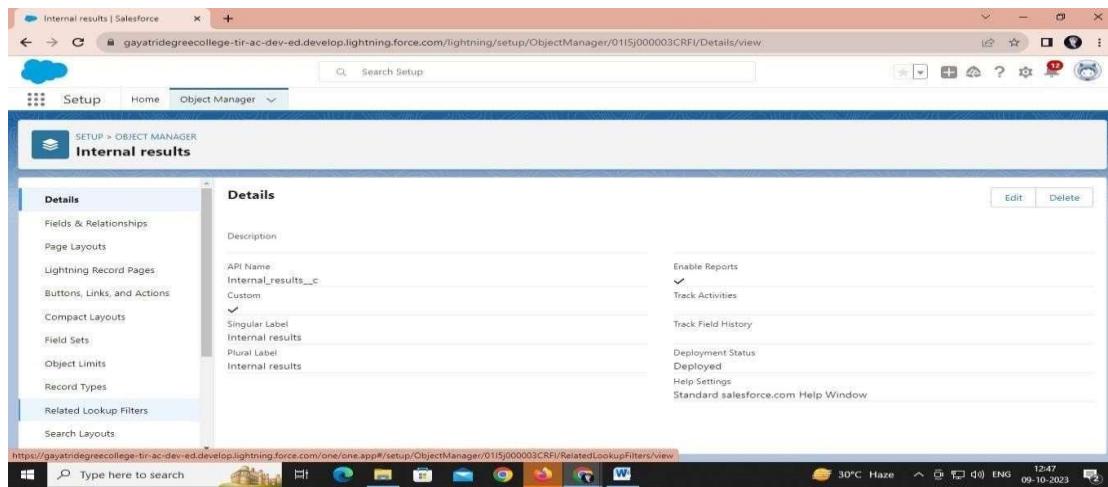


## Object – Lecturer Details

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Lecturer Details
6. Plural Label: Lecturer Details
7. Record Name: Lecturer Details Name
8. Check the Allow Reports
9. Check the Allow Search 10. 10.Click Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Lecturer Details' under 'SETUP > OBJECT MANAGER'. On the left, there's a sidebar with various configuration options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The main panel is titled 'Details' and contains fields for 'Description', 'API Name' (set to 'Lecturer\_Details\_\_c'), 'Custom' (with a checked checkbox), 'Singular Label' (set to 'Lecturer Details'), 'Plural Label' (set to 'Lecturer Details'), 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right of the main panel are 'Edit' and 'Delete' buttons.

1. Object – Internal results
2. Click on the gear icon and then select Setup.
3. Click on the object manager tab just beside the home tab.
4. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
5. On the Custom Object Definition page, create the object as follows:
6. Label: – Internal results
7. Plural Label: Internal results
8. Record Name: Internal results Name
9. Check the Allow Reports
10. Check the Allow Search 11. 10.Click Save.



## Milestone – 03: 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:

- Standard Object Tabs:** Standard object tabs display data related to standard objects
- Custom Object Tabs:** Custom object tabs display data related to custom objects.
- Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
- Visual force Tabs:** Visual force Tabs display data from a Visual force Page.

Creation of semester candidate internal result card Now create a custom tab. Click the Home tab.

- Enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save
- In the same way create Tabs for all Custom Objects -Candidate, Course Details, Lecturer Details, Internal results.

### Custom Tabs

Help for this Page 🎉

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		New	What Is This?	
Action	Label	Tab Style	Description	
Edit   Del	Candidates		Apple	
Edit   Del	Course Details		Bridge	
Edit   Del	Internal results		Train	
Edit   Del	Lecturer Details		Camera	
Edit   Del	Semesters		Globe	

## Milestone – 04: 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 two types of app –

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center content, Salesforce chatter, App Launcher, etc are present in it.

Note: The description, Logo, and Label of standard app cannot be altered.

2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together. Note: Logos for Custom Apps can be changed.

## 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, Interna results, Reports, and Dashboards and move them to Selected Items.

7. Click Next

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



## App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

**3**

\* App Name ⓘ  
 Candidate Internal Result Card

\* Developer Name ⓘ  
 Candidate\_Internal\_Result\_Card

Description ⓘ  
 A card showing candidate details

**App Branding**

Image ⓘ

Primary Color Hex  
 Value ⓘ  
#0070D2

## New Lightning App

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.

**6**

Available Items

Dashboards

Selected Items

- Semesters
- Candidates
- Course Details
- Lecturer Details
- Reports

Milestone – 05: fields and relationship

## FieldsAnd Relationship

Fields - Fields store data values that are required for a particular object in a record . An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access

Object Name	Field Name	Data type

Semester	Semester Name Course	Text(Standard field) Lookup(Course Details)
Candidate	Candidate Name Candidate Roll Number Semester Name	Text(Standard field) Auto Number Lookup(Semester)
Lecturer Details	Lecturer Name Lecturer Role Course	Text(Standard field) Text Lookup(Course)
Course Details	Course Name Duration (Years)	Text(Standard field) Number
Internal results	Candidate Candidate Roll Number Course Marks	Lookup (candidate) Formula Lookup(Course) Number

## 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

Click Next, Next, then Save & New

The screenshot shows the Salesforce Object Manager. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Lecturer\_Detail\_\_c' entry in the list, which is labeled 'Custom Object'. A third red box highlights the 'New' button at the top right of the list view.

This screenshot shows the 'Fields & Relationships' page for the 'Lecturer\_Detail\_\_c' object. A red box highlights the 'Fields & Relationships' tab in the left sidebar. Another red box highlights the 'New' button at the top right of the list view. The table lists one field: 'Address' (Field Name, Text Data Type). The 'Data Type' dropdown menu is open, showing various options like Number, Percentage, Phone, etc., with 'Text' selected. A detailed description of the 'Text' data type is visible in the help panel below.

This screenshot shows the 'Step 2. Enter the details' configuration screen for the 'Address' field. A red box highlights the 'Field Label' input field containing 'Lecturer Role'. Another red box highlights the 'Length' input field containing '40'. A third red box highlights the 'Field Name' input field containing 'Lecturer\_Role'. The 'Next' button at the top right is highlighted with a red box. A fourth red box highlights the 'Help Text' input field at the bottom.

The screenshot shows the Salesforce Setup interface. In the top left, there's a cloud icon and the word 'Setup'. Next to it are 'Home' and 'Object Manager'. A search bar says 'Search Setup'. On the right, there are various icons for help and navigation. The main area is titled 'LECTURER DETAILS' and shows a 'Custom Field Definition Detail' for 'Lecturer Role'. It includes sections for 'Field Information' (Field Label: 'Lecturer Role', API Name: 'Lecturer\_Role', etc.) and 'General Options' (Required, Unique, Case Sensitive, etc.). At the bottom, it shows 'Created By: MANCHALA SREESADA 10/10/2023, 8:32 am' and 'Modified By: MANCHALA SREESADA 10/10/2023, 8:32 am'. A sidebar on the left lists other setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

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.

This screenshot shows the Salesforce Object Manager. At the top, there's a blue header with a cloud icon, 'SETUP', 'Home', and the 'Object Manager' tab, which is highlighted with a red box. To the right of the tab are icons for search, schema builder, and create. Below the header, there's a search bar with the word 'lecturer' typed into it. The main area is titled 'Object Manager' and shows a table of objects. The columns are labeled 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. One row is visible for 'Lecturer Details', with its API name 'Lecturer\_Details\_\_c' highlighted with a red box. The 'DEPLOYED' column shows a checkmark. At the bottom of the table, there's a red box with the number '3'.

Details	Fields & Relationships	Quick Find	New	Deleted Fields	Field Dependencies	Self-History Tracking
Sage Layouts			5			
Lightning Record Pages	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
	Address	Address_c	Text(50)			
	Created By	CreatedById	Lookup(1)			

each have field



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.



A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.



Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a picklist. The other object is the source of the values in the list.



Creates a special type of parent-child relationship between this object (the child, or "Detail") and another object (the parent, or "Master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user removes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a picklist. The master object is the source of the values in the list.

Step 2: Choose the related object

Step 2

Previous Next Cancel

Select the other object to which this object is related.

Related To:

Semester

Previous Next Cancel

Field Label:

Semester Name

Field Name:

Semester\_\_Name

Description:

Help Text:

8

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

My Sent Mail - abhituhanov3@gmail.com · abhituhanov · Google Docs · Smartintern · Semester | Salesforce · +

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Semester

Semester Field Semester Name Back to Semester

Help for this Page

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 List View Button Layout Restriction Rules Scoping Rules

Field Information

Field Label:	Semester Name
Data Type:	Text(60)
Default Value:	
Field Usage:	
Date Sensitivity Level:	
Compliance Categorization:	

Validation Rules

No validation rules defined.

# 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	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedBy	Lookup(1)		

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedBy	Lookup(1)		

The screenshot shows the 'New Field' setup page. The 'Field Label' is set to 'Duration' (highlighted by a red box). A note below says: '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 (highlighted by a red box)      Decimal Places: 2 (highlighted by a red box)

Field Name: Duration

Description:

Help Text: Enter Course duration value in Years (highlighted by a red box)

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  
11. Click Next, Next, then Save.

The screenshot shows the 'Fields & Relationships' list page. The 'New' button is highlighted with a red box (step 4).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedBy	Lookup		

The screenshot shows the 'Fields & Relationships' list page after saving. The 'New' button is no longer visible (step 5).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedBy	Lookup		

**Data Type**

Select one of the data types below.

- None Selected
- Auto Number
- Formula

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 8

Add this field to existing custom report types that contain this entity

**Formula Return Type**

Select one of the data types below.

- None Selected
- Boolean
- Currency
- Date
- DateTime
- Number
- Percent
- Text

Calculate a boolean value.  
Example: [TOLOGIC] > CloseDate

Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: [Gross Margin] + [Amount] - [Cost\_\_c]

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

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

Calculate a numeric value.  
Example: [Percentage] \* 0.01 \* [Sales\_\_c] + 25

Calculate a percent and automatically add the percent sign to the number.  
Example: ([Discount] \* [Amount] - [Discounted\_Amount\_\_c]) / [Amount]

Create a text string, for example, by concatenating other text fields.  
Example: [EU Country] + [Country] + " - " + [Country]

**Operators & Functions**

Functions:  ABS, ACOS, ADDMONTHS, AND, ASCH, ASIN

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

[Simple Formula](#) [Advanced Formula](#)

Language: English (Text) 9

Insert Field 10 Insert Operator

**Insert Field**

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

Internal results > = \$Api > \$Organization > \$Profile > \$System > \$User > \$UserRole >	Candidate > Candidate > Created By > Created By ID > Created Date > Internal results Name > Last Modified By > Last Modified By ID > Last Modified Date >	Address > Candidate Name > Candidate Roll Number <span style="border: 2px solid red; padding: 2px;">11</span> City > Created By > Created By ID > Created Date > Education > Email >	You have selected: Candidate__r.Candidate_Roll_Number__c Type: Auto Number API name: Candidate__r.Candidate_Roll_Number__c
--	---	--	---

**Candidate Custom Field**  
**Candidate Roll Number**  
Back to Candidate

**Custom Field Definition Detail**

**Field Information**

Field Label	Candidate Roll Number	Object Name	Candidate
Field Name	Candidate_Roll_Number	Data Type	Auto Number
API Name	Candidate_Roll_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MANCHALA.SREESADA, 10/10/2023, 8:26 am	Modified By	MANCHALA.SREESADA, 10/10/2023, 8:26 am

**General Options**

External ID	
-------------	--

**Auto Number Options**

Display Format	Gdc-{000}
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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.

**Fields & Relationships**

11 items, Sorted by Field Label

New Deleted Field Field Dependencies All History tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text		
Created By	CreatedBy	Lookup		

**Fields & Relationships**

11 items, sorted by Field Label

New | Deleted Field | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedById	Lookup(1..1)		

Select one of the data types below:

- None Selected
- Auto Number
- Formula
- Read-Only Summary

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.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

### Candidate New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next

Field Label	<input type="text" value="Candidate Roll Number"/>	7
Display Format	<input type="text" value="CAD-(000)"/>	Example: A-(0000) <a href="#">What is This?</a>
Starting Number	<input type="text" value="1"/>	8
Field Name	<input type="text" value="Candidate_Roll_Number"/>	9
Description	<input type="text"/>	
Help Text	<input type="text"/>	

Milestone – 06: users

## Creating A User

- From Setup, in the Quick Find box, enter Users.
- Select Users.
- Click New User.
- Enter the First Name, Class, Last Name, Teacher and (Your) email address and a unique username in the form of an emailaddress. By default, the username is the same as the email address.
- 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.

- Select a profile as Standard user.
- Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

Setup Home Object Manager

Q user 1

**SETUP** Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users Edit | Create New View

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1_User	u1	utkarsh2@vanshiv.com	Operator 1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2_User	u2	utkarsh3@vanshiv.com	Operator 2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rs8akea!mujojkjxf1@chattersalesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Technologies_Vanshiv	YTech	vehicledemo@vanshiv.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Teddy_John	Jted	utkarsh1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

New User Reset Password(s) Add Multiple Users

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	

Role <None Specified>  
User License Salesforce  
Profile Standard User  
Active

Marketing User   
Offline User   
Knowledge User   
Flow User   
Service Cloud User

Milestone – 07: user adoption

## User Adoption

Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital 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 Candidate Internal Result Card interface. At the top, there is a navigation bar with various tabs: Semesters, Candidates, Course Details (which is highlighted with a red box), Lecturer Details, Reports, and Dashboards. Below the navigation bar, there is a search bar labeled "Search..." and a toolbar with icons for star, plus, question mark, settings, and notifications. A red box labeled "3" highlights the "Course Details" tab. On the left side, there is a sidebar titled "Recently Viewed" with a "Course Details" icon. The main content area shows a table with one item: "0 items • Updated a few seconds ago". The table has columns for "Course Name" and other details. At the top right of the table, there are buttons for "New", "Import", and "Change Owner", with "New" highlighted by a red box labeled "4".

The screenshot shows the "New Course Details" dialog box. It has a title bar "New Course Details" and a section titled "Information". Inside the "Information" section, there are two input fields: "Course Name" containing "MBA" and "Duration" containing "2". Both fields are highlighted with a red box labeled "5". To the right of these fields, there is an "Owner" section showing "Vanshiv Technologies" with a user icon. At the bottom of the dialog box, there are three buttons: "Cancel", "Save & New", and a large blue "Save" button, which is also highlighted with a red box labeled "6".

The screenshot shows the "Course Details" list view. At the top, there is a navigation bar with tabs: Course Details (highlighted with a red box labeled "3"), Lecturer Details, Internal results, Reports, and Dashboards. Below the navigation bar is a search bar and a toolbar with icons. A red box labeled "4" highlights the "Course Details" tab. The main content area shows a table with four items. The first item is expanded, showing a list of "Course Details Name": 1. MBA (Marketing), 2. BTech, 3. BSe, 4. BCA. The table has columns for "Course Details Name" and other details. At the top right of the table, there are buttons for "New", "Import", and "Change Owner".

## 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

The screenshot shows the Salesforce interface with the following details:

- Top Navigation:** Setup, Home, Object Manager.
- Search Bar:** Candidate Internal Result Card.
- App Launcher:** Candidate Internal Result Card (highlighted with a red box).
- Items List:** No results found, View All.
- Page Header:** Candidate Internal ..., Semesters, Candidates (3), Course Details (highlighted with a red box), Lecturer Details, Reports, Dashboards.
- Course Details List View:**

	Course Name ↑	Duration	Created Date
1	BCA	3.00	09/04/2023, 7:39 pm
2	BSc	3.00	09/04/2023, 7:39 pm
3	Btech	4.00	09/04/2023, 7:38 pm
4	MBA	2.00	09/04/2023, 7:38 pm
- Course Details Record View:**

**MBA (Marketing)**

Related		Details	
Course Details Name	MBA (Marketing)	Owner	MANCHALA SREESADA
Course Name	MBA		
Duration	2.00		
Created By	MANCHALA SREESADA, 10/10/2023, 8:49 am	Last Modified By	MANCHALA SREESADA, 11/10/2023, 12:54 am

## 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.

The screenshots illustrate the Salesforce interface for creating a new 'Candidate Internal Result Card' and managing 'Course Details'.

**Top Screenshot:** Shows the creation of a new 'Candidate Internal Result Card'. A red box highlights the 'Create' button in the top right corner of the search bar.

**Middle Screenshot:** Shows the 'Course Details' list view. A red box highlights the 'Course Details' tab in the navigation bar. The list displays four items: BCA, BSc, Btech, and MBA. The 'Edit' and 'Delete' buttons are visible for each item. A red box highlights the 'Delete' button for the fourth item (MBA).

**Bottom Screenshot:** Shows the 'Recently Viewed' list view under 'Course Details'. A red box highlights the 'Recently Viewed' tab in the navigation bar. The list displays four items: MBA (Marketing), Btech, BSc, and BCA. The 'Edit' and 'Delete' buttons are visible for each item. A red box highlights the 'Delete' button for the first item (MBA).

Milestone – 08: what are Reports?

## 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 .

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 waywe are making a Matrix Report).
7. Click refresh
8. Click save and run
9. Give report name – Candidate Internal Result Report 10.Click Save

The image consists of three vertically stacked screenshots of a software interface, likely a report builder or dashboard application. Each screenshot shows a different stage of the report creation process:

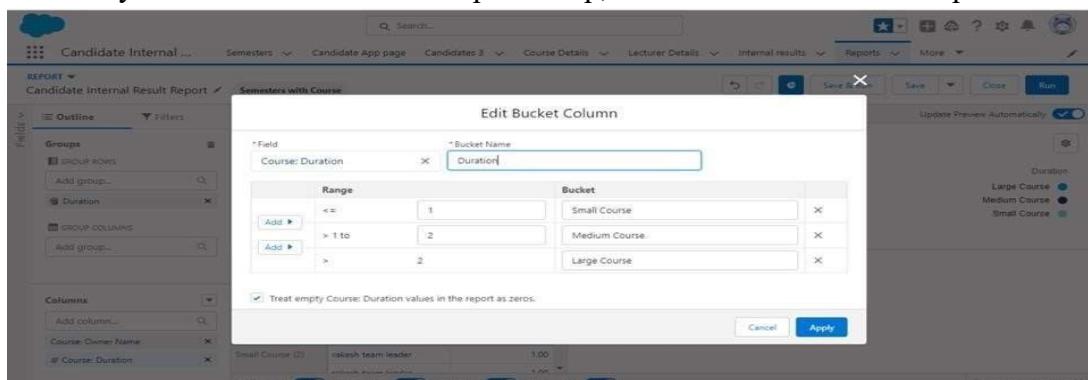
- Screenshot 1:** Shows the app launcher with "Candidate Internal Result Card" selected. A red box highlights the "Setup" icon in the top left corner.
- Screenshot 2:** Shows the main application window with a search bar and a grid of icons. A red box highlights the "Reports" tab in the top navigation bar.
- Screenshot 3:** Shows the report builder interface. A red box highlights the "New Report" button in the top right corner.

Below these three screenshots, there is a numbered list of steps:

1. On the report builder page, locate the "Fields" pane on the left-hand side.

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

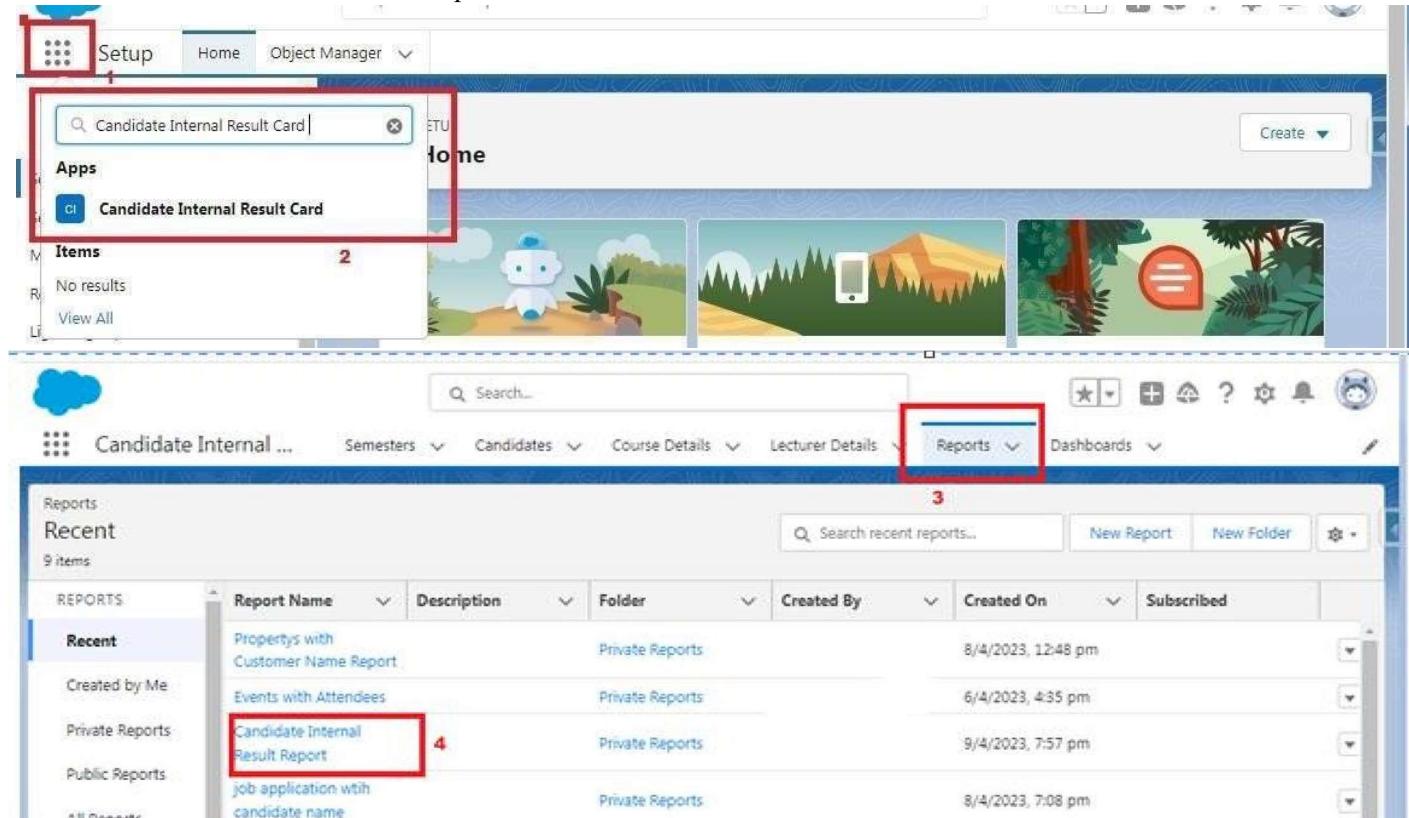
Report Description

Cancel Save

## 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 Odoo application interface. At the top, there is a navigation bar with 'Setup' (highlighted with a red box), 'Home', 'Object Manager', and a search bar containing 'Candidate Internal Result Card'. Below this is a section titled 'Apps' with a card for 'Candidate Internal Result Card' (also highlighted with a red box). A sidebar on the left shows 'Items' with 'No results' and a 'View All' link. The main area displays three decorative cards: a white robot, a smartphone in a landscape, and a jungle scene with a red button. The bottom part of the interface shows a report list under 'Reports' with a 'Recent' tab selected. The 'Recent' tab lists several reports, including 'Customer Name Report', 'Events with Attendees', 'Candidate Internal Result Report' (highlighted with a red box and labeled '4'), and 'job application with candidate name'. The 'Candidate Internal Result Report' row contains a link labeled 'Report: Semesters with Course Candidate Internal Result Report'. Below this, a table displays 'Total Records' (7) and a grid of course and semester data.

Course: Course Name	Semester: Semester Name	Course: Course Details Name	Duration
B.Tech (2)	Semester 03	B.Tech (Mechanical)	Large Course
	Semester 02	B.Tech (Automobile)	Large Course
<b>Subtotal</b>			
BCA (1)	Semester 06	BCA (Data Science)	Small Course
<b>Subtotal</b>			
BSC (3)	Semester 04	B.SC (Nursing)	Medium Course
	Semester 05	B.Sc (Bio Technology, Chemistry, Computer Applications)	Medium Course
	Semester 07	B.Sc (Bio Technology, Chemistry, Computer Applications)	Medium Course
<b>Subtotal</b>			
MBA (1)	Semester 01	MBA (Finance)	Large Course
<b>Subtotal</b>			
<b>Total (7)</b>			

Milestone – 06: dashboards

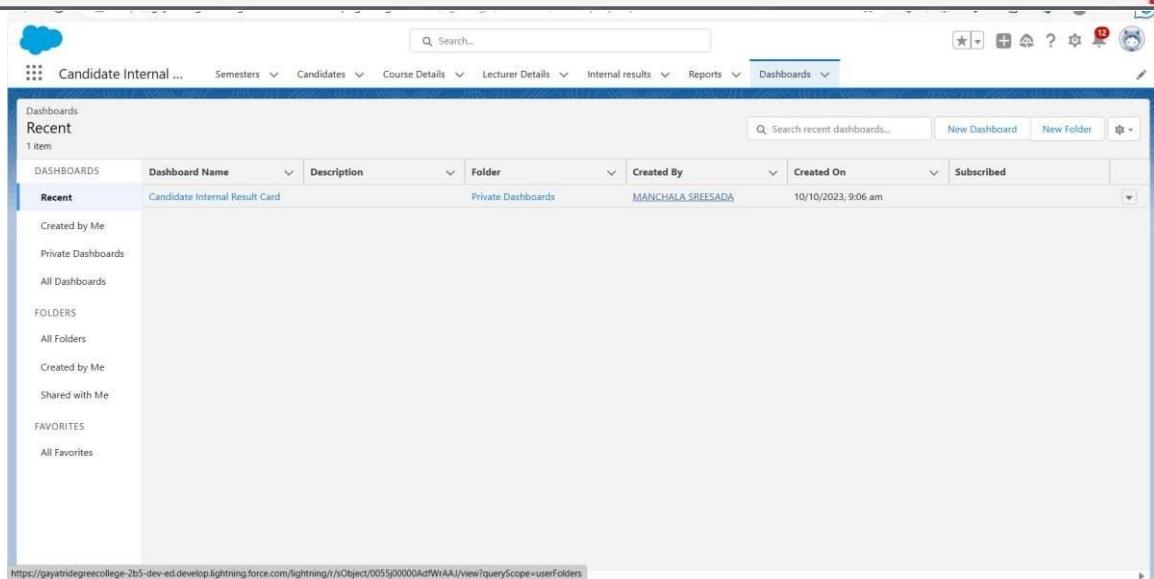
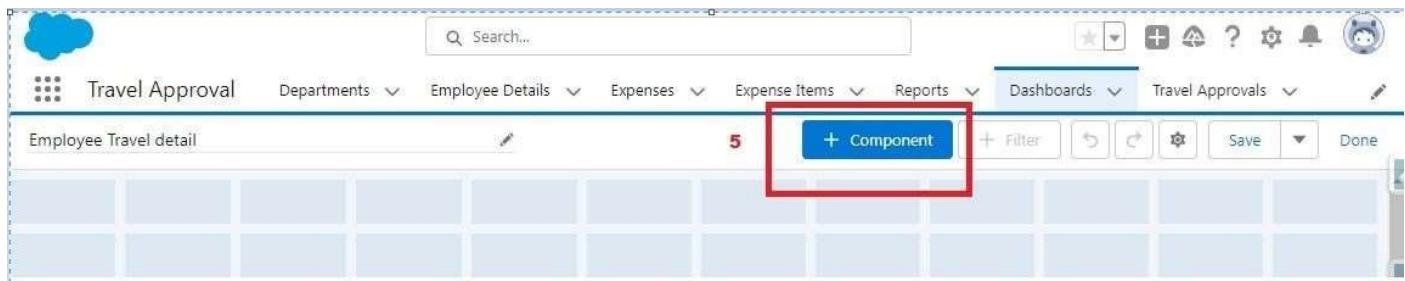
# Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, they can 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 application interface for creating a new dashboard. At the top, there is a navigation bar with various tabs: Travel Approval, Departments, Employee Details, Expenses, Expense Items, Reports, Dashboards (which is highlighted with a red box labeled 1), and Travel Approvals. Below the navigation bar, there is a sidebar on the left labeled 'Recent' with '3 items'. In the center, there is a search bar with the placeholder 'Search recent dashboards...' and a button labeled 'New Dashboard' (which is highlighted with a red box labeled 2). At the bottom, there is a form titled 'New Dashboard' with fields for 'Name' (containing 'Candidate Internal Result Card'), 'Description' (with a red box labeled 3), 'Folder' (containing 'Private Dashboards'), and 'Select Folder' (with a red box labeled 4). There are also 'Cancel' and 'Create' buttons at the bottom right.



## 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 the Salesforce Home page with several key components highlighted:

- Setup** icon (top left, highlighted with a red box).
- Candidate Internal Result Card** app (search result in the Apps section, highlighted with a red box).
- Items** section (No results, View All).
- Dashboards** section (Recent, highlighted with a red box).
- DASHBOARDS** table (Recent, Private Dashboards, All Dashboards, FOLDERS, All Folders). The row for "Candidate Internal Result Card" is highlighted with a red box and labeled **4**.
- Candidate Internal Result Card** report (Record Count vs Course: Course Name bar chart, highlighted with a red box).

Milestone-07: Screen Flow

## 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.

## CreateAScreen 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 canvas 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 canvas and give the details as follows:

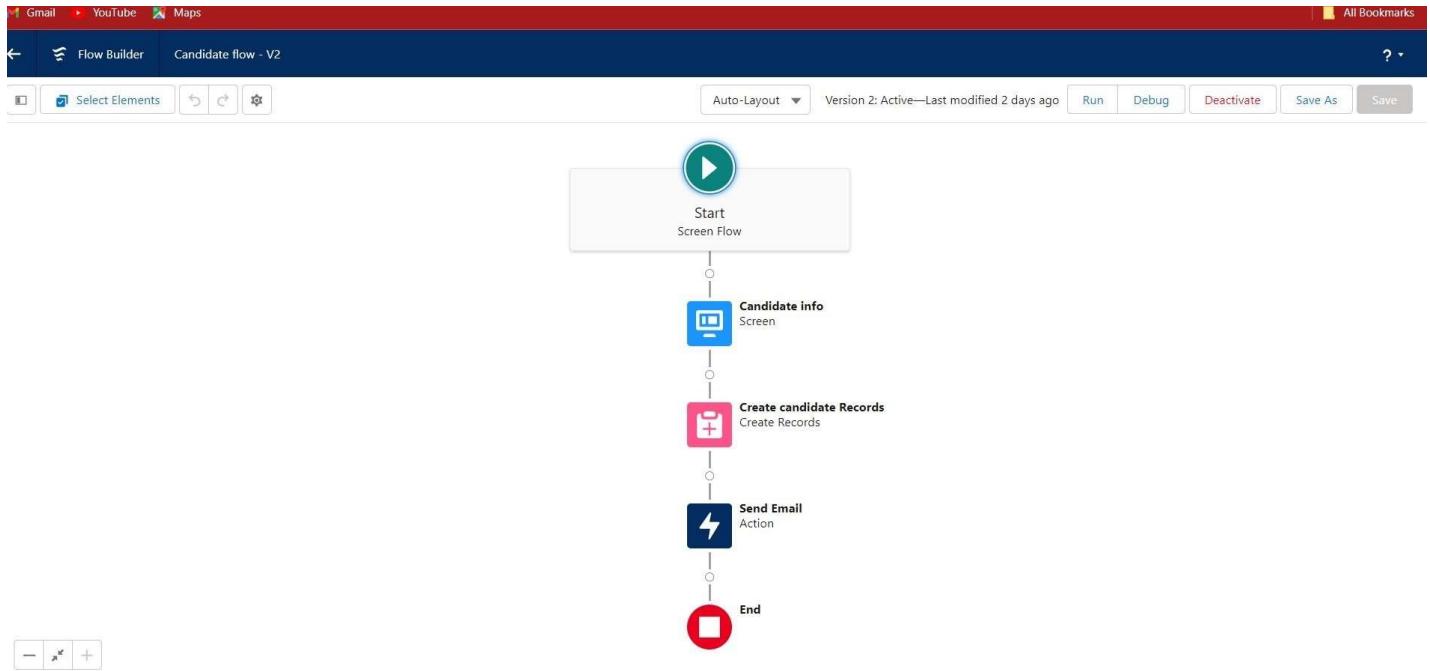
15. Select (+)
- 16.Select the Action element from the drop down.

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.

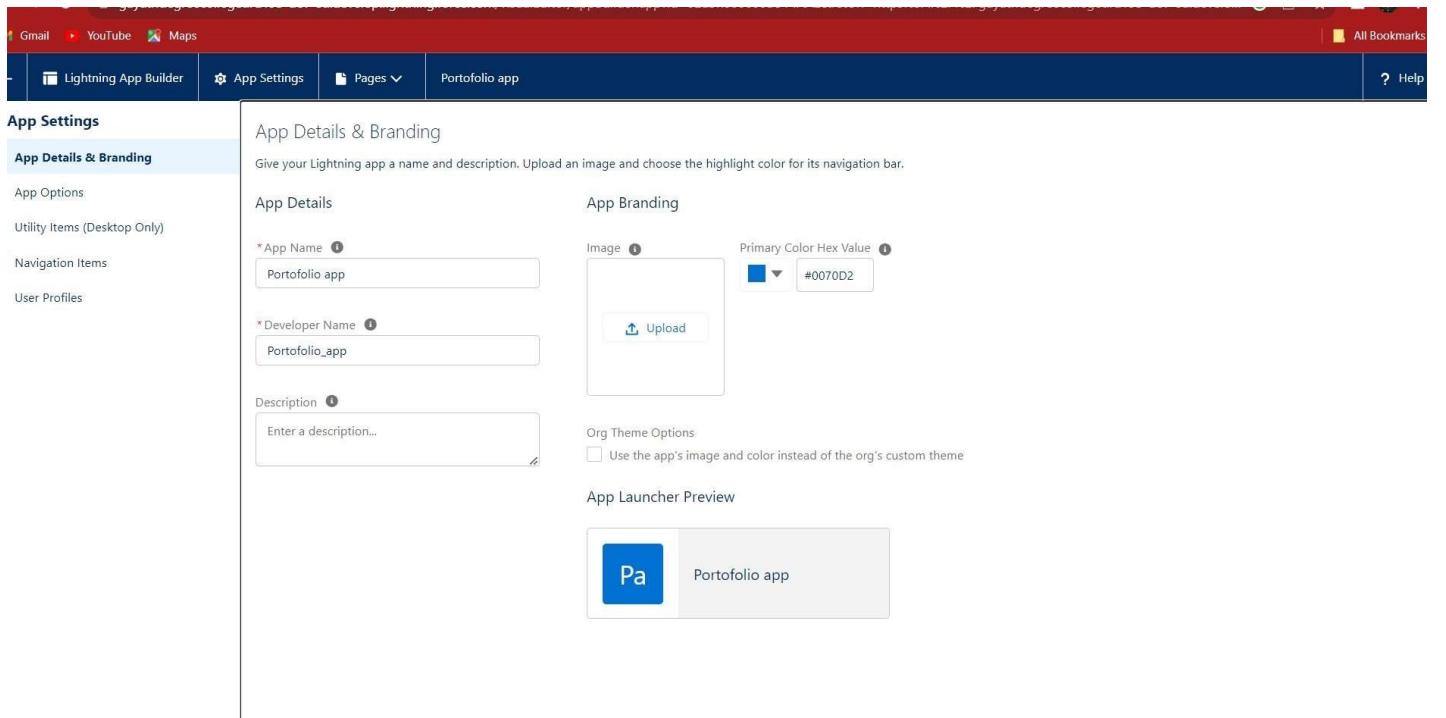
## App Page

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.



## 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 InternalmarksHandler4. Now Write the below code

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes 'File', 'Edit', 'Debug', 'Test', 'Workspace', and 'Help'. The current tab is 'InternalmarksHandler.apxc'. Below the tabs, there's a dropdown for 'Code Coverage' set to 'None' and 'API Version' set to '58'. The main area contains the Apex code for the 'InternalmarksHandler' 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, there's a toolbar with tabs for 'Logs', 'Tests', 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems'. The 'Logs' tab is selected. At the bottom, there's a log viewer with a 'Filter' input field containing 'Click here to filter the log list'.

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

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

InternalmarksHandler.apxc [ Internalmarks.apxt ]

Code Coverage: None ▾ API Version: 58 ▾ Go!

```

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 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Jsr Application Operation Time ▾ Status Read Size

Filter Click here to filter the log list

## 8.Trigger Working as follows:

In the following record Marks field is given as 300,Now trigger triggers and status changes to Pass

Field	Value
Internal results Name	Test Trigger
Candidate	Candidate
Candidate Roll Number	
Course	
Marks	300
Status	Pass
Created By	PILLIGUNDLA KUSUMANJALI, 10/10/2023, 6:54 pm
Last Modified By	PILLIGUNDLA KUSUMANJALI, 10/10/2023, 6:54 pm

THEEND





