

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.

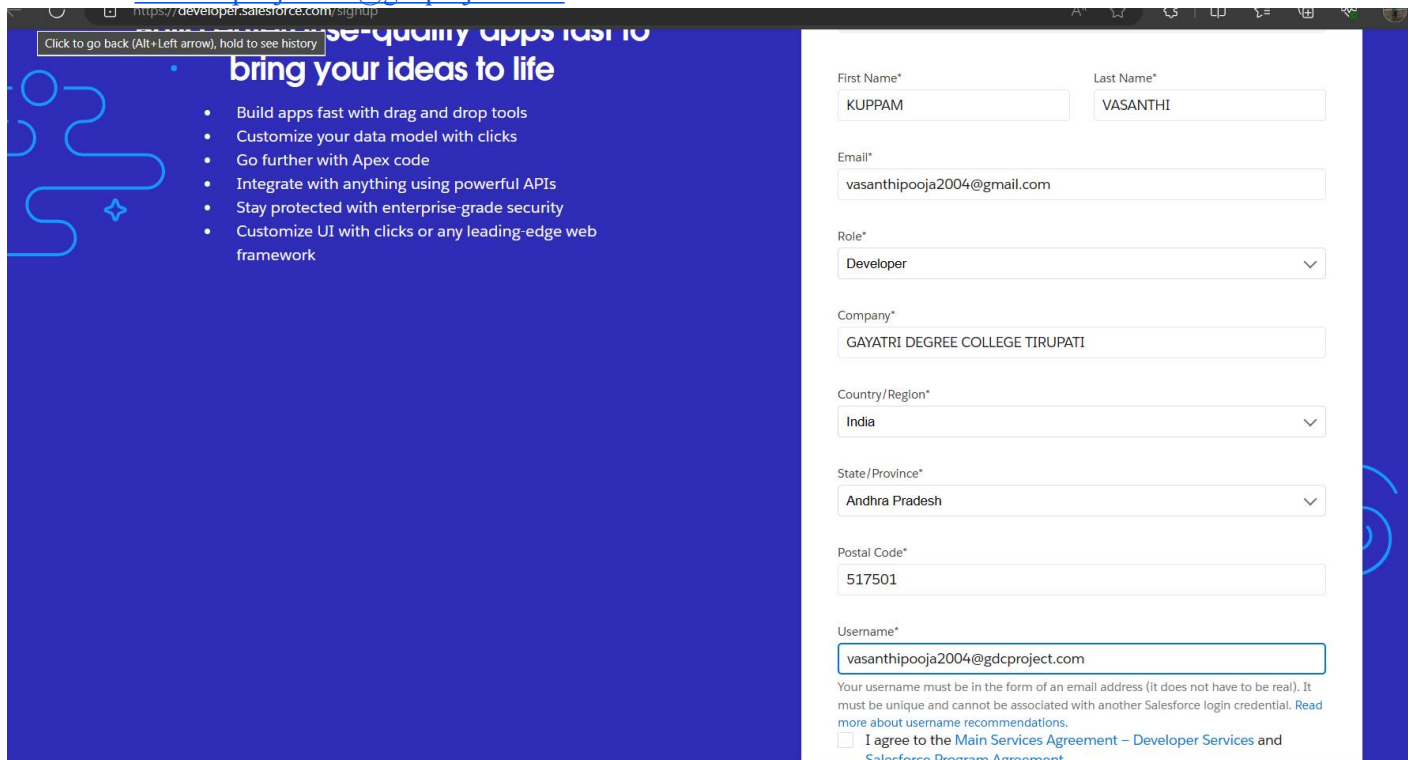
Milestone 01: Create Salesforce Org Go to

[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 –KUPPAM VASANTHI
2. Email –vasanthipooja2004@gmail.com
3. Role: Developer
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: vasanthipooja2004@gdcproject.com

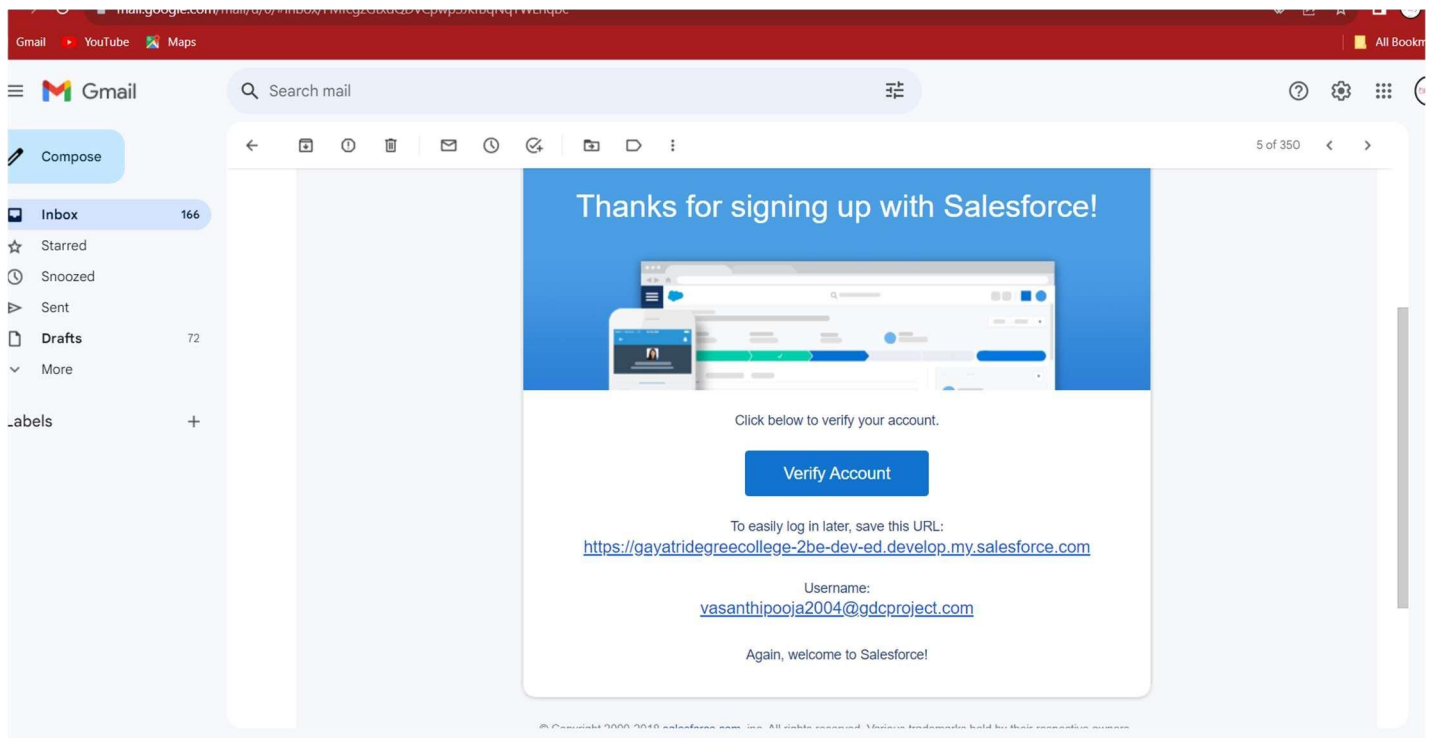


The screenshot shows the Salesforce Developer Signup page. On the left, there is a blue sidebar with the text 'sequency apps fast to bring your ideas to life' and a list of bullet points: 'Build apps fast with drag and drop tools', 'Customize your data model with clicks', 'Go further with Apex code', 'Integrate with anything using powerful APIs', 'Stay protected with enterprise-grade security', and 'Customize UI with clicks or any leading-edge web framework'. The main form area on the right contains the following fields: 'First Name*' (KUPPAM), 'Last Name*' (VASANTHI), 'Email*' (vasanthipooja2004@gmail.com), 'Role*' (Developer), 'Company*' (GAYATRI DEGREE COLLEGE TIRUPATI), 'Country/Region*' (India), 'State/Province*' (Andhra Pradesh), 'Postal Code*' (517501), and 'Username*' (vasanthipooja2004@gdcproject.com). Below the username field, there is a note: '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.' and a checkbox for 'I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement'.

8.

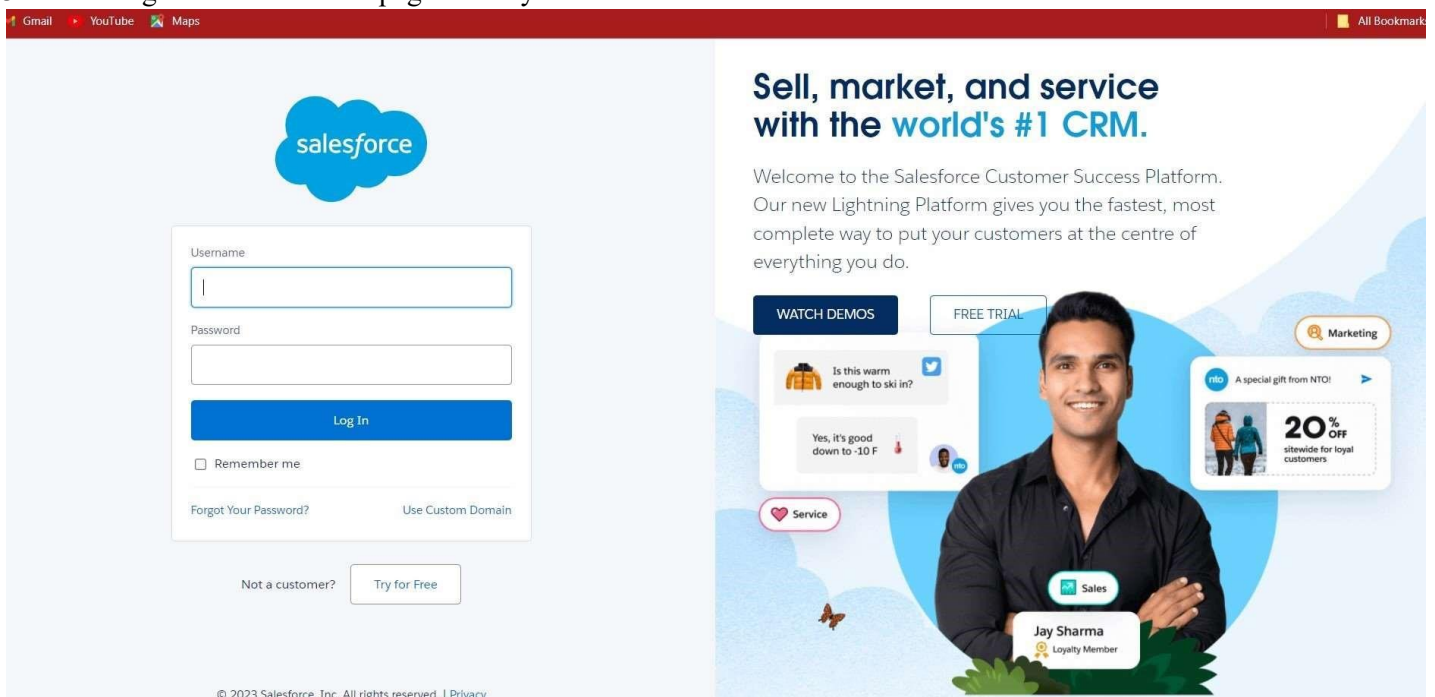
8.Account Activation

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



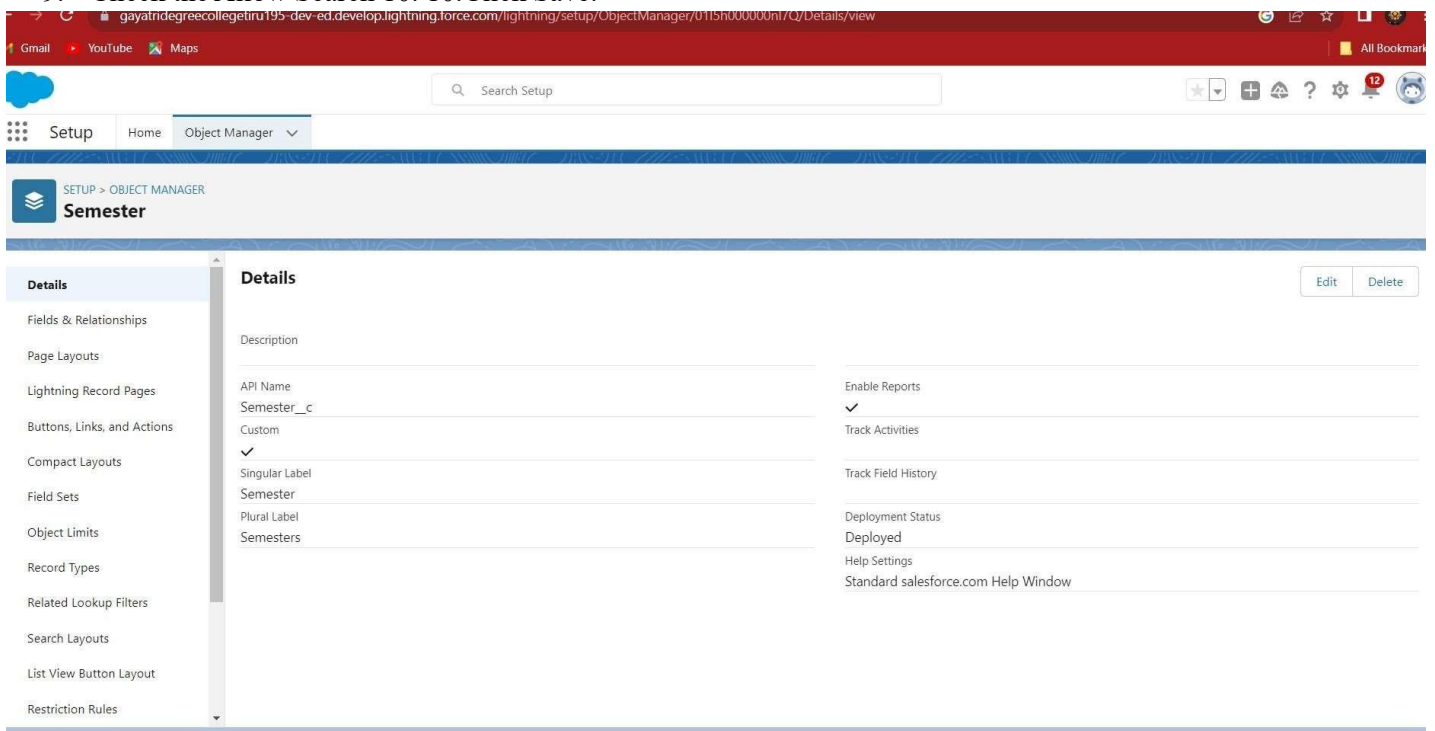
Login to Your Salesforce Account

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

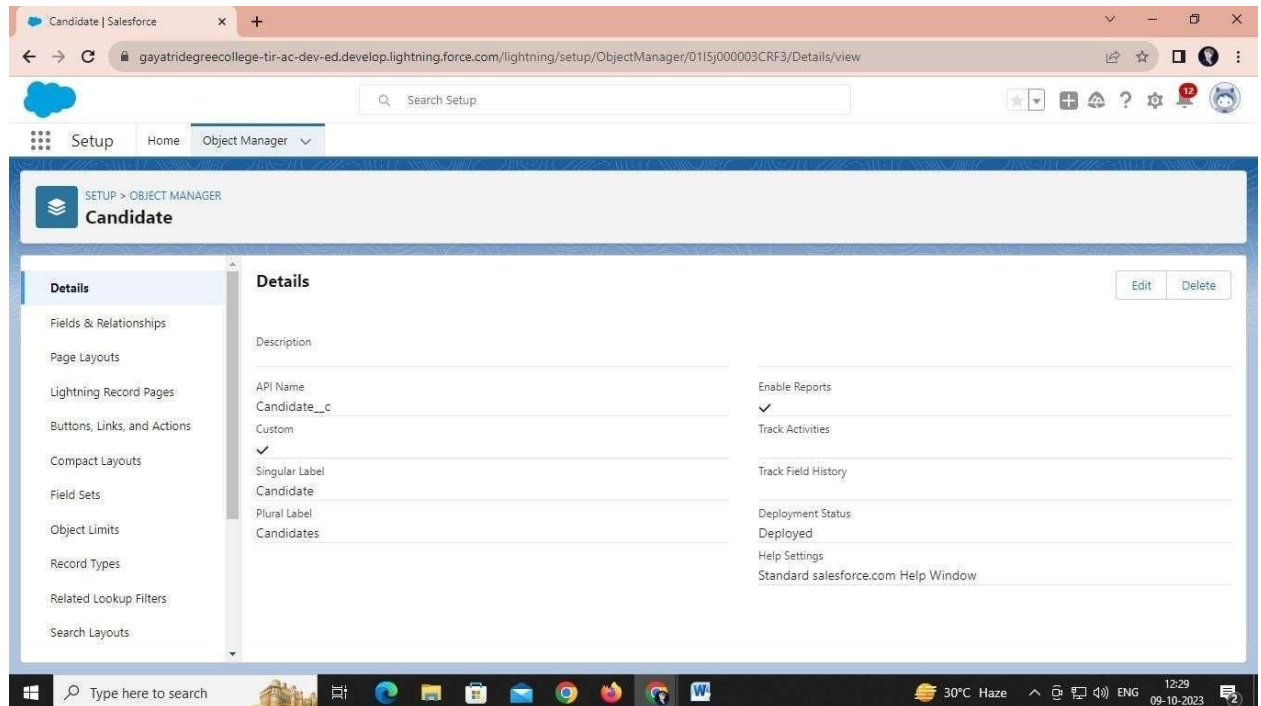
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object 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. 10.Click Save.



Object – Candidate

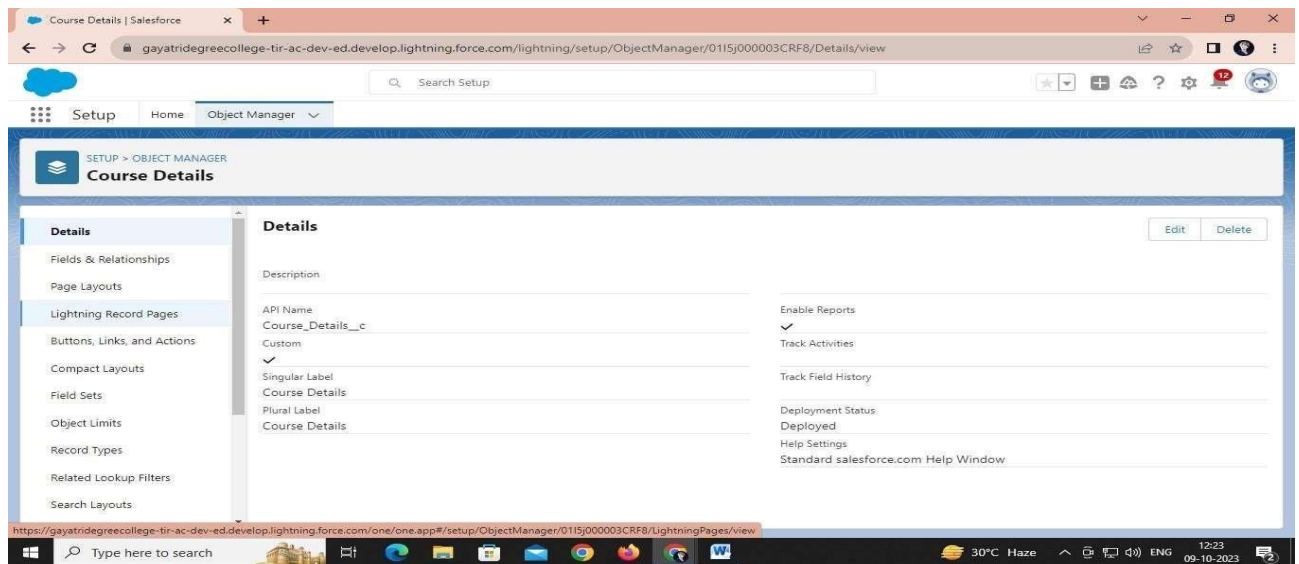
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object 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



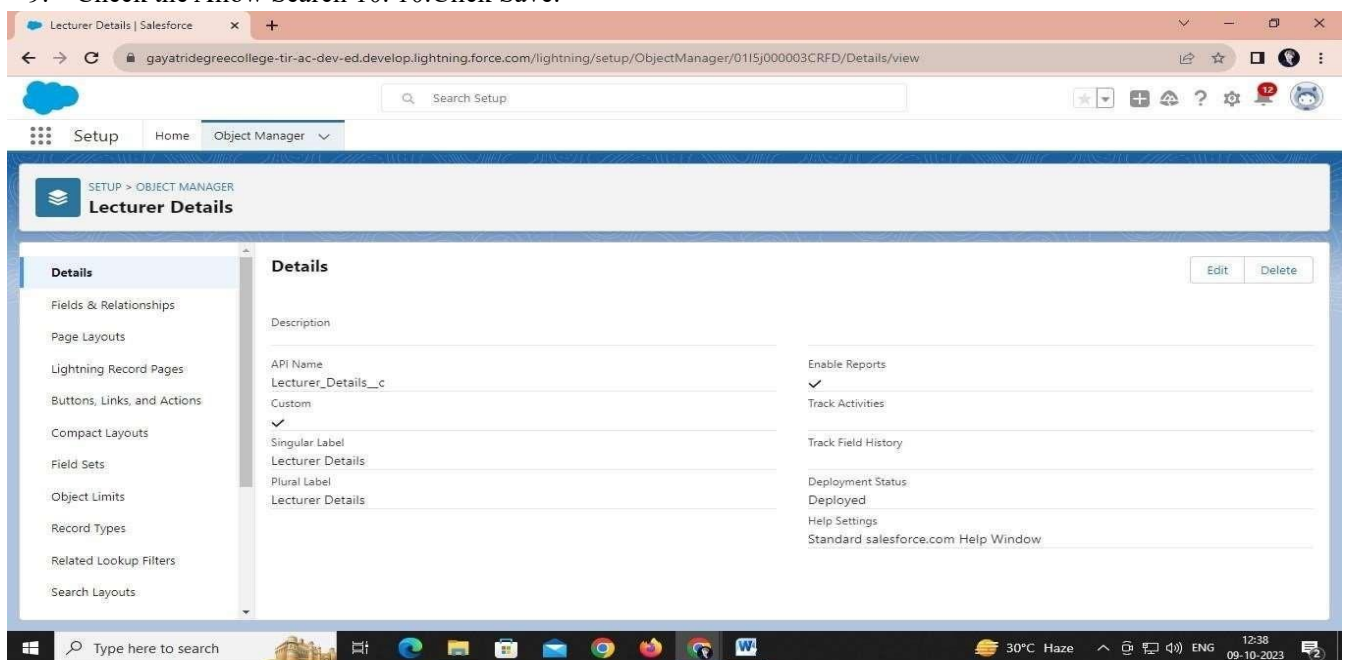
Object – Course Details

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 Click Save.



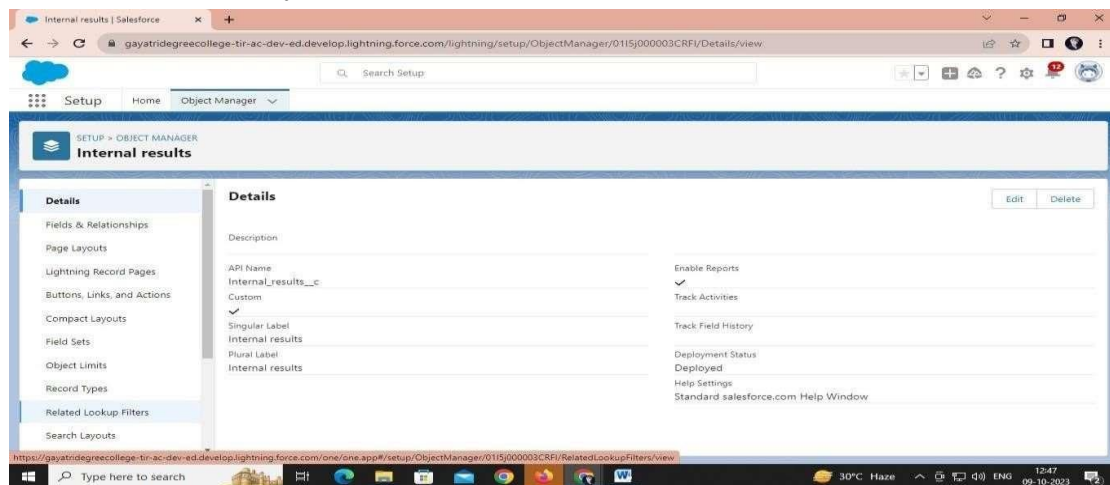
Object – Lecturer Details

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.



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:

- 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. 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.

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.






 **SETUP**
Tabs

Custom TabsHelp 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

*** App Name** ¹

Candidate Internal Result Card


*** Developer Name** ¹

Candidate_Internal_Result_Card


Description ¹


App Branding


Image ¹



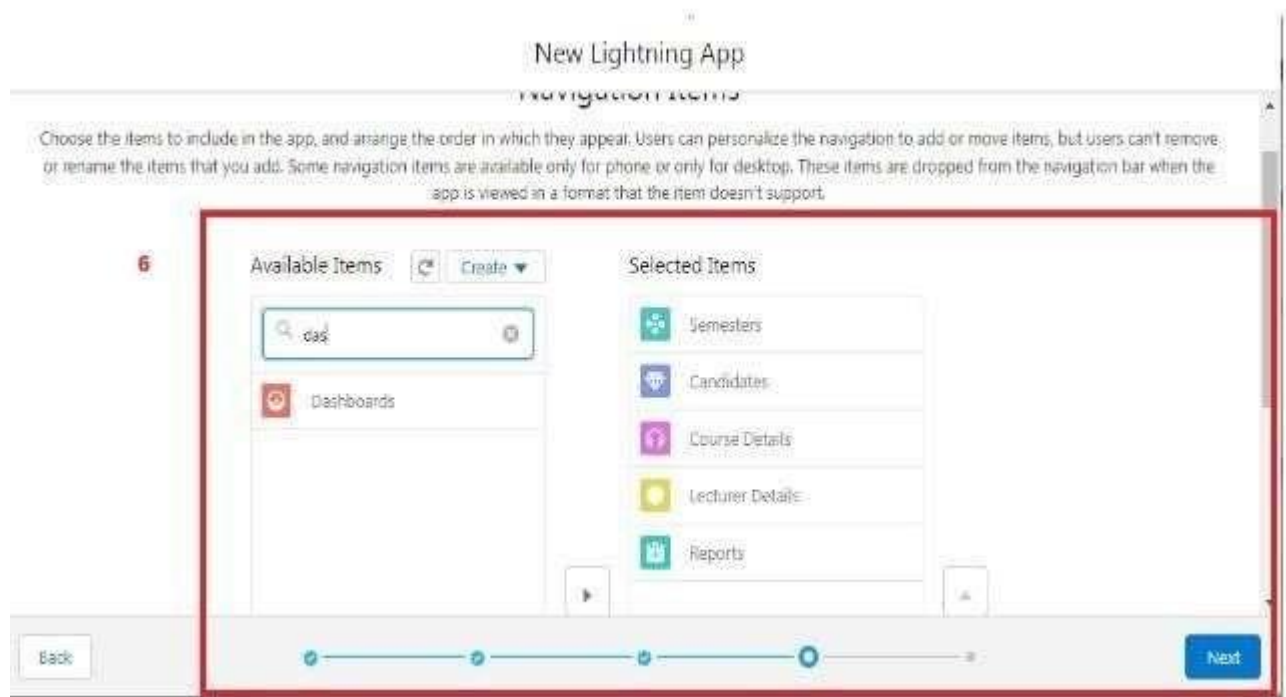
Primary Color Hex Value ¹

 #0070D2





Next



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
9. Click Next, Next, then Save & New



Details:

Fields & Relationships

Page Layout

Lightning Record Pages

Fields & Relationships

11 Items | Sorted by Rule Label

Q, Quick Find

New Deleted Field Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------|------------|-------------|-------------------|---------|
| Address | Address_c | Text(50) | | |
| Created By | CreatedBy | Lookup(100) | | |

Members

Personal

Phone

Presence

Product (Multi-Select)

Test

Test Area

Test Area (Image)

Test Area (Image)

Test (Microoptions) / All

Time

URL

Address used to enter any number. Leading zeros are removed.

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

Allows users to enter up to 1,024 characters on separate lines.

Allows users to enter formatted text, and images and links, with 1,024 characters on separate lines.

Allows users to enter any combination of letters and numbers (characters that is supported).

Allows users to enter a time zone. For example, "1:45 PM", "1:45", "1:45:00", and "1:45:00:000" are all valid times for the field.

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

Reset Cancel

Setup | Home | Object Manager ▾

SETUP > OBJECT MANAGER

Lecturer Details

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

[Help for this Page](#)

Lecturer Details Custom Field

Lecturer Role

Back to Lecturer Details

[Validation Rules](#)

Custom Field Definition Detail

[Edit](#) | [Set Field Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)

| Field Information | | Object Name | Lecturer Details |
|---------------------------|--|-------------|--|
| Field Label | Lecturer Role | Data Type | Text |
| Field Name | Lecturer_Role | | |
| API Name | Lecturer_Role__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | MANCHALA SREESADA, 10/10/2023, 8:32 am | Modified By | MANCHALA SREESADA, 10/10/2023, 8:32 am |

General Options

- Required ☐
- Unique ☐
- Case Sensitive ☐
- External ID ☐
- Default Value

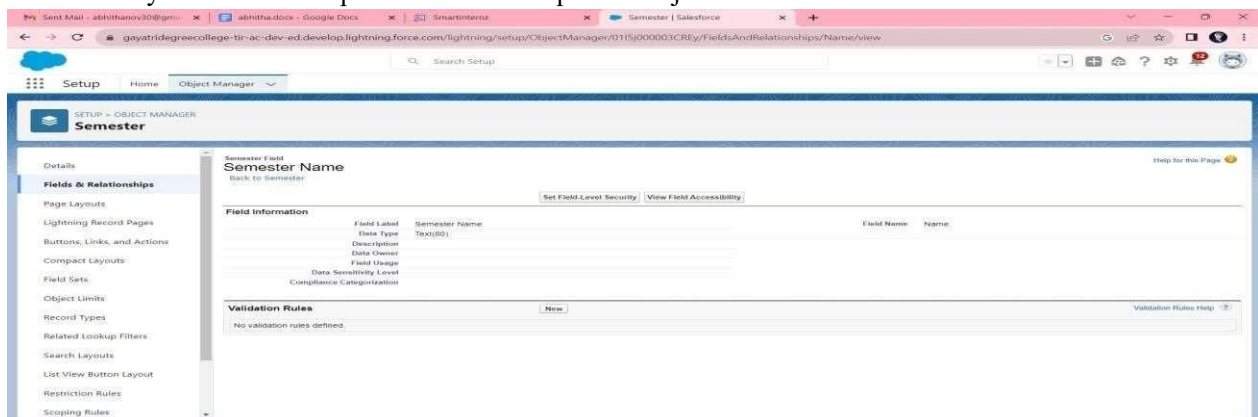
Text Options

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.



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.



Now Let's create a Formula field on Internal Results object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Internal results.
4. Select Fields & Relationships from the left navigation.
5. Click New
6. Select the Formula as the Data Type, then click Next.
7. Give field label Candidate Roll Number
8. Select formula return type text, Click Next
9. Click Insert Field
10. Create and insert formula Candidate r.Candidate_Roll_Number c, and then click Insert.
11. Click Next, Next, then Save.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------|-------------|-------------|-------------------|---------|
| Address | Address_c | Text(50) | | |
| Created By | CreatedById | Lookup(128) | | |

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------|-------------|-------------|-------------------|---------|
| Address | Address_c | Text(50) | | |
| Created By | CreatedById | Lookup(128) | | |

Data Type

☐ None Selected Select one of the data types below

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

☒ Formula **6**
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**

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

Formula Return Type

☐ None Selected Select one of the data types below

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

☐ Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{GrossMargin * Amount / Cost}`

☐ Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: `{ReminderDate + CloseDate / 7}`

☐ DateTime
Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `{NextToNow / 24}`

☐ Number
Calculate a numeric value.
Example: `{Parishat * 1.5 * Cost / 100}`

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

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

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

Simple Formula **Advanced Formula**

Insert Field **9** **Insert Operator**

Describe with Number (Text) =

Operators & Functions

Functions:
- All Function Categories -
ABS
ACOS
ADDMONTHS
AND
ASCH
ASIN
[Insert Selected Function](#)

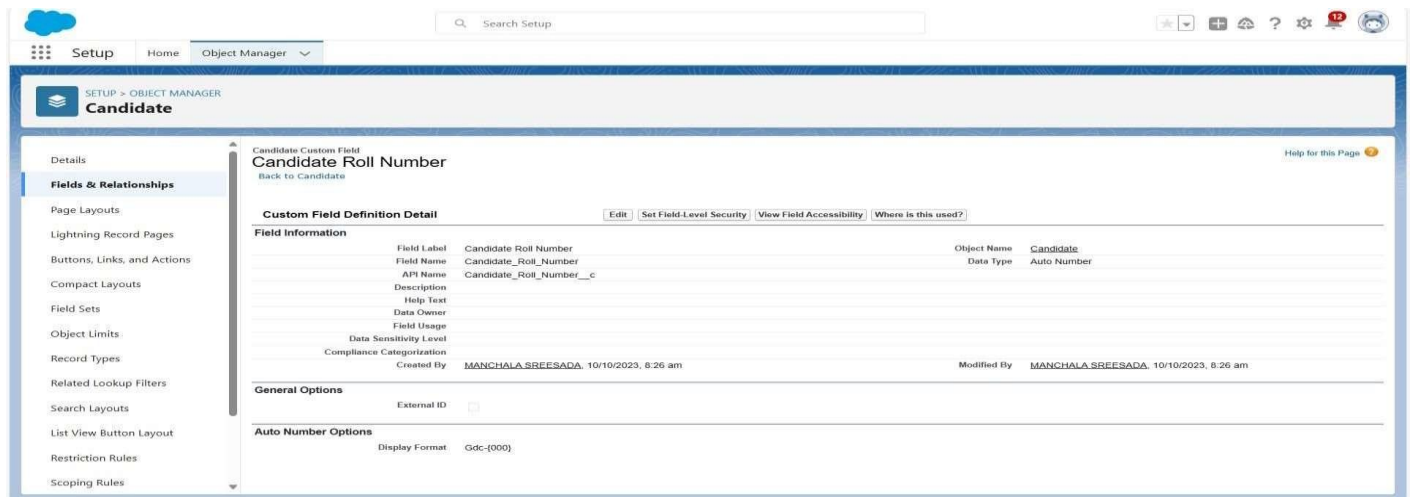
Insert Field **10**

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

| | | |
|--|---|--|
| Internal results > \$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 City Created By > Created By ID Created Date Education Email |
|--|---|--|

You have selected:
Candidate__c.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__c.Candidate_Roll_Number__c

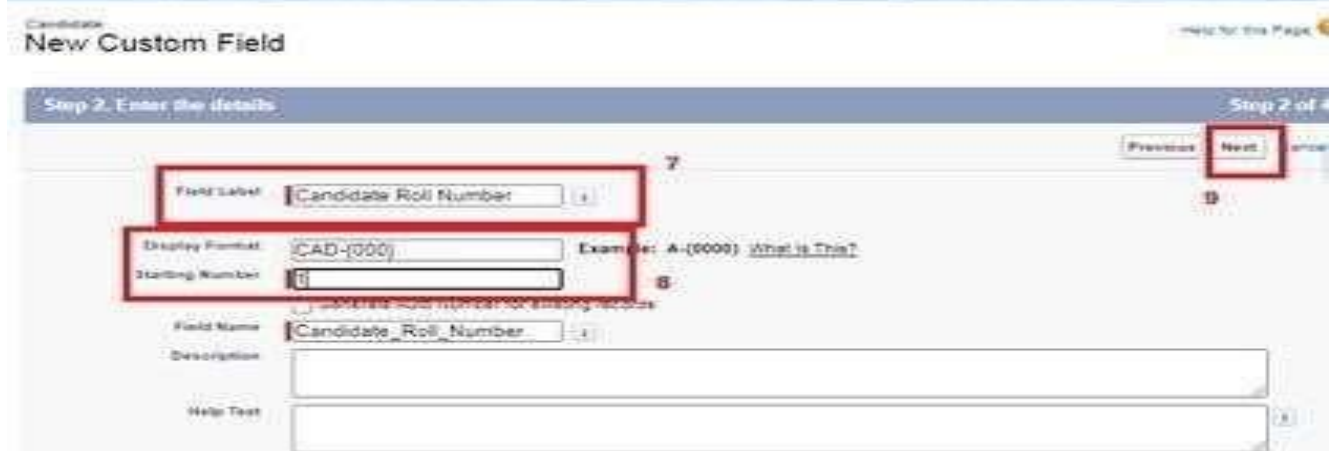
Insert



Now Let's create an auto number field on Candidate object 1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate enter Roll Number.
8. Give a display format
9. Click Next, Next, then Save & New.





Milestone – 06: users

Creating A User

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

NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license Or change the license type from Salesforce to any other.

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

Setup Home Object Manager

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

New User Reset Password(s) Add Multiple Users

| Action | Full Name ↑ | Alias | Username | Role | Active | Profile |
|-------------------------------|----------------------|---------|---|-----------------|--------|----------------------|
| <input type="checkbox"/> Edit | 1. User | u1 | utkarsh2@vanshiv.com | Operator 1 | ✓ | operator |
| <input type="checkbox"/> Edit | 2. User | u2 | utkarsh3@vanshiv.com | Operator 2 | ✓ | operator |
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty00d2w00000rs8akeaj.mujrgkyfxf1@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | Technologies Vanshiv | VTech | vehicledemo@vanshiv.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | Teddy John | J.ted | utkarsh1@vanshiv.com | Vehicle Manager | ✓ | Vehicle Manager |

User Edit Save Save & New Cancel

General Information

First Name: 4

Last Name:

Alias:

Email:

Username:

Nickname: i

Role: 5

User License: 6

Profile: i

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Milestone – 07: user adoption

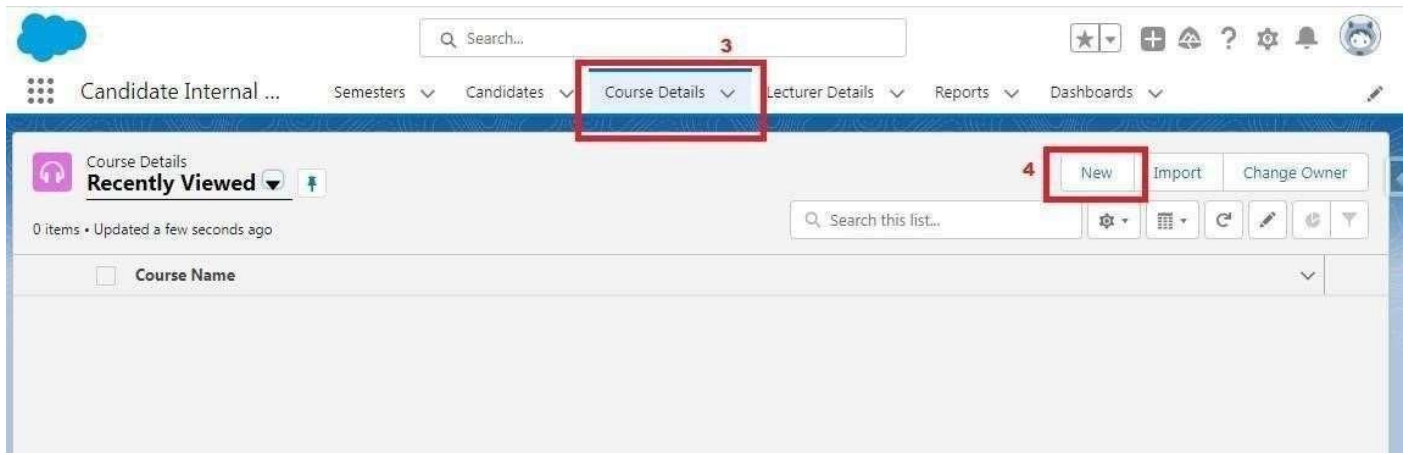
User Adoption

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.



New Course Details

Information

* Course Name ↺

MBA

Duration i ↺

2

Owner

Vanshiv Technologies

5

6

Cancel Save & New Save

| | Course Details Name | |
|---|--|--|
| 1 | <input type="checkbox"/> MBA (Marketing) | |
| 2 | <input type="checkbox"/> Btech | |
| 3 | <input type="checkbox"/> BSc | |
| 4 | <input type="checkbox"/> BCA | |

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

Setup Home Object Manager

Candidate Internal Result Card

Apps

Candidate Internal Result Card

Items

No results

View All

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

Course Details

All

New Import Change Owner

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

Search this list...

| | 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

MBA (Marketing)

New Contact Edit New Opportunity

Related Details

Course Details Name

MBA (Marketing)

Course Name

MBA

Duration

2.00

Owner

MANCHALA SREESADA

Created By

MANCHALA SREESADA, 10/10/2023, 8:49 am

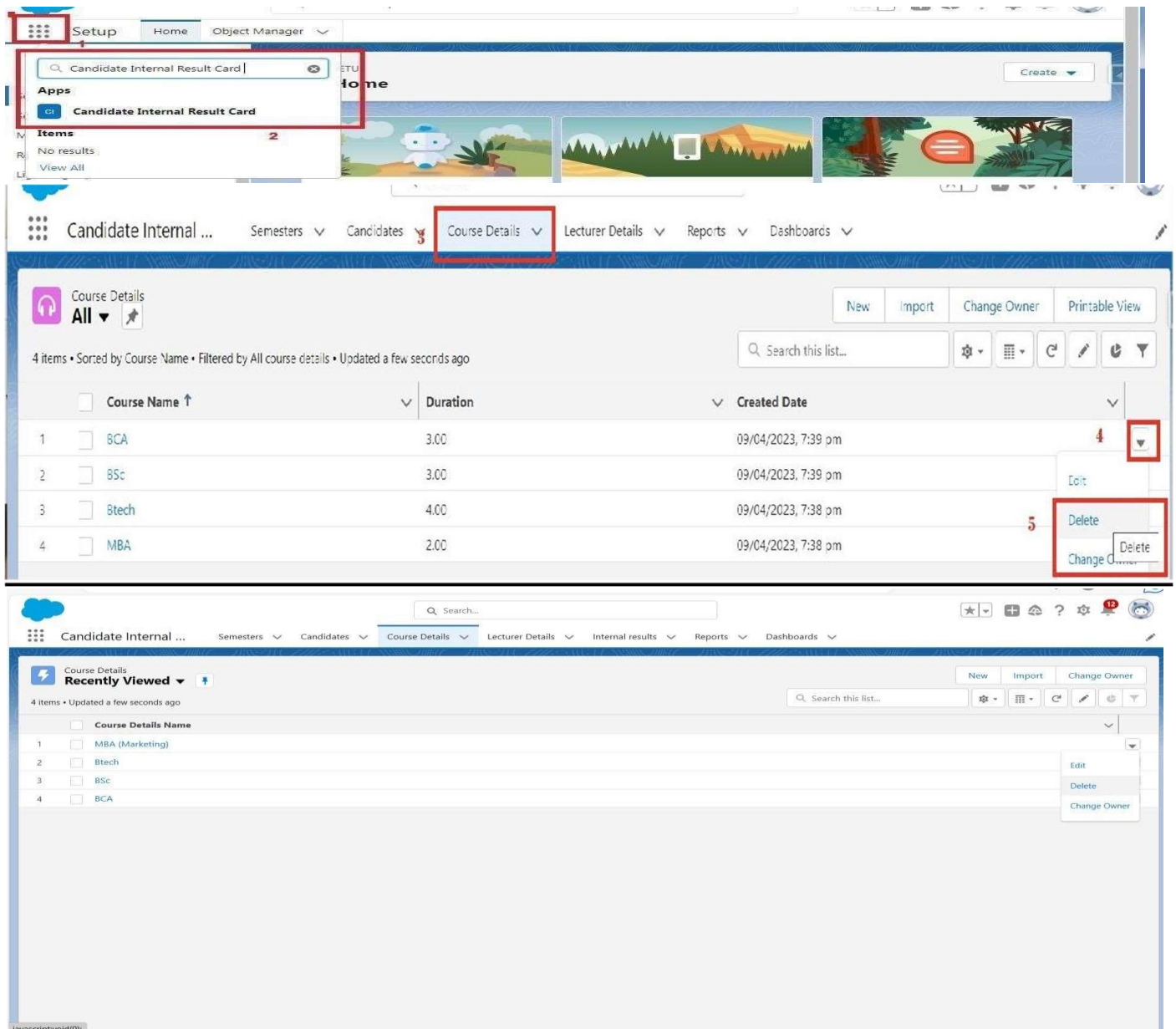
Last Modified By

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.



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 in 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:

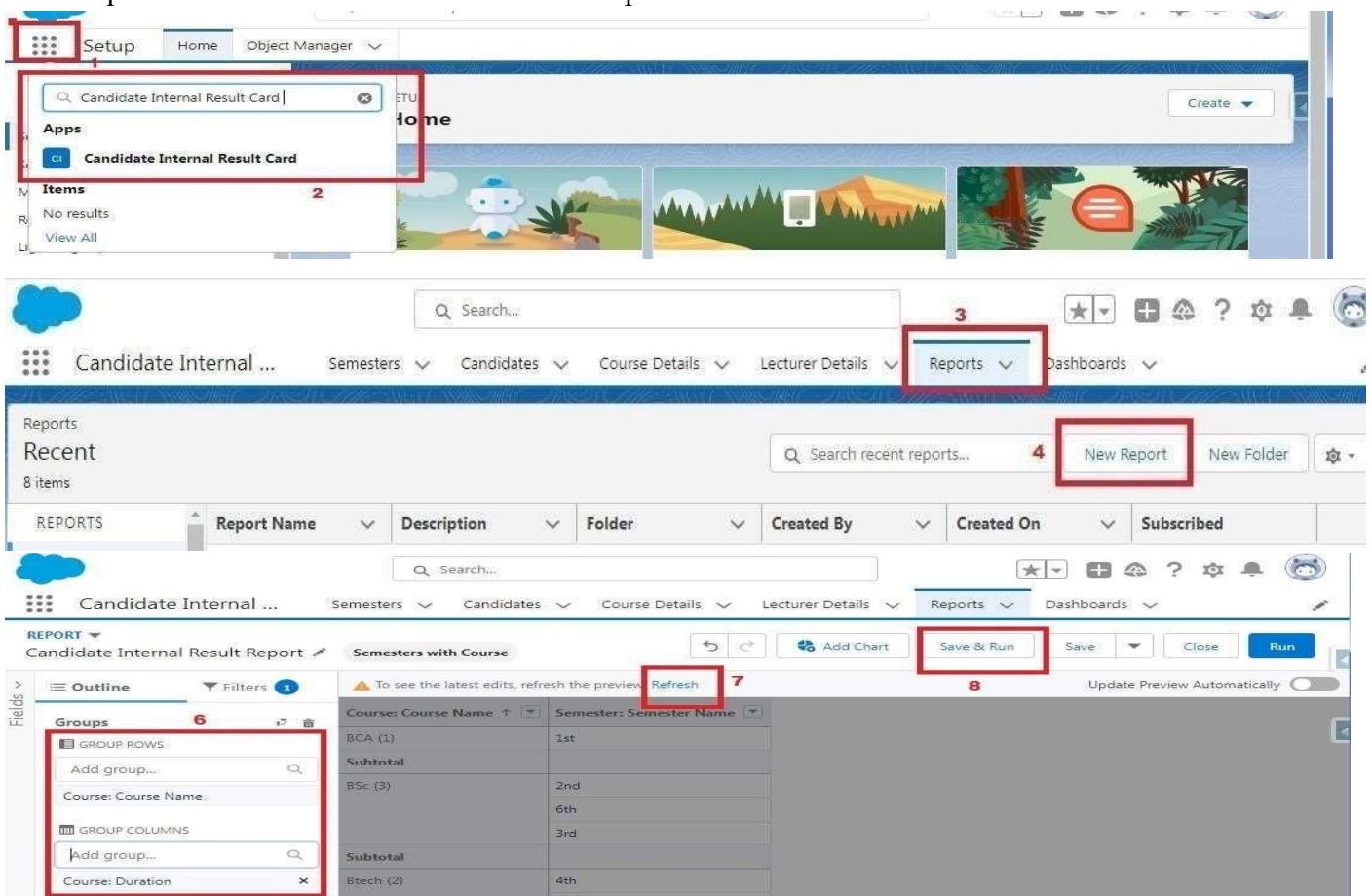
Viewer: With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report

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.

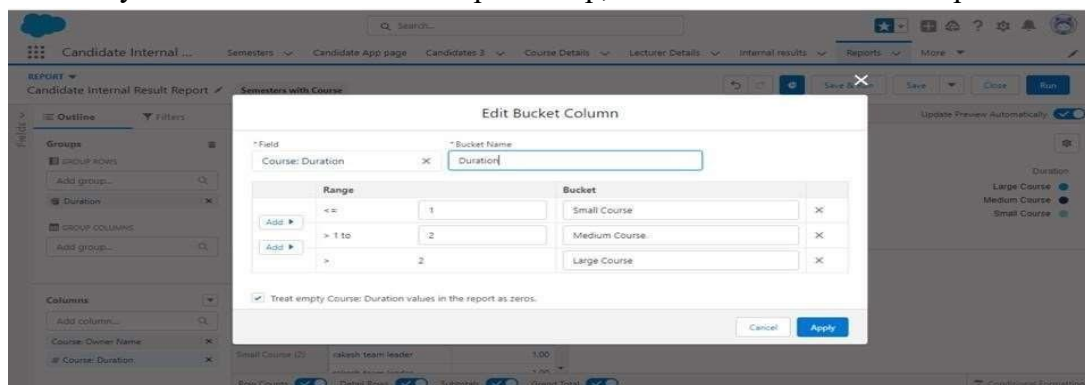
Create Report

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 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



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

- Find the field for which you want to create a bucket field and drag it to the report preview section.
- Click on the field in the report preview to open the field properties.
- In the field properties, locate the "Summarize" option and click the drop-down arrow.
- Select "Bucket Field" from the available options.
- In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.
- Click "OK" or "Apply" to save the bucket field settings.
- Customize the report layout and add any additional fields or filters as needed.
- Once you are satisfied with the report setup, click "Save" to save the report.



Save Report

Save Report

Report Name Candidate Internal Result Report 9

Report Unique Name Candidate_Internal_Result_Report_bkY

Report Description

Cancel
Save 10

View Report

- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card App & click on it.
- Click on Reports Tab.

4. Click on Candidate Internal Result Report and see records.

The screenshot shows the system's navigation menu. The 'Setup' tab is selected, and the search bar contains 'Candidate Internal Result Card'. The search results show 'Candidate Internal Result Card' under the 'Apps' section. The 'Reports' tab is also visible in the top navigation bar. The 'Candidate Internal Result Report' is highlighted in the 'Recent' reports list.

Report: Semesters with Course
Candidate Internal Result Report

Total Records
7

| 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 |
| Subtotal | | | |
| BCA (1) | Semester 06 | BCA (Data Science) | Small Course |
| Subtotal | | | |
| 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 |
| Subtotal | | | |
| MBA (1) | Semester 01 | MBA (Finance) | Large Course |
| Subtotal | | | |
| Total (7) | | | |

Milestone – 06: dashboards

Dashboards

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

Create Dashboard

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

The screenshot illustrates the steps to create a new dashboard. It shows the application's top navigation bar with the 'Dashboards' tab highlighted (1). Below this, the 'Recent' dashboards section is visible, and the 'New Dashboard' button is highlighted (2). The 'New Dashboard' form is shown with the 'Name' field containing 'Candidate Internal Result Card' (3). The 'Description' field is empty. The 'Folder' dropdown is set to 'Private Dashboards', and the 'Select Folder' button is highlighted (4). At the bottom right, the 'Create' button is highlighted.

Travel Approval Departments Employee Details Expenses Expense Items Reports Dashboards Travel Approvals

Dashboards
Recent
3 items

Search recent dashboards... New Dashboard New Folder

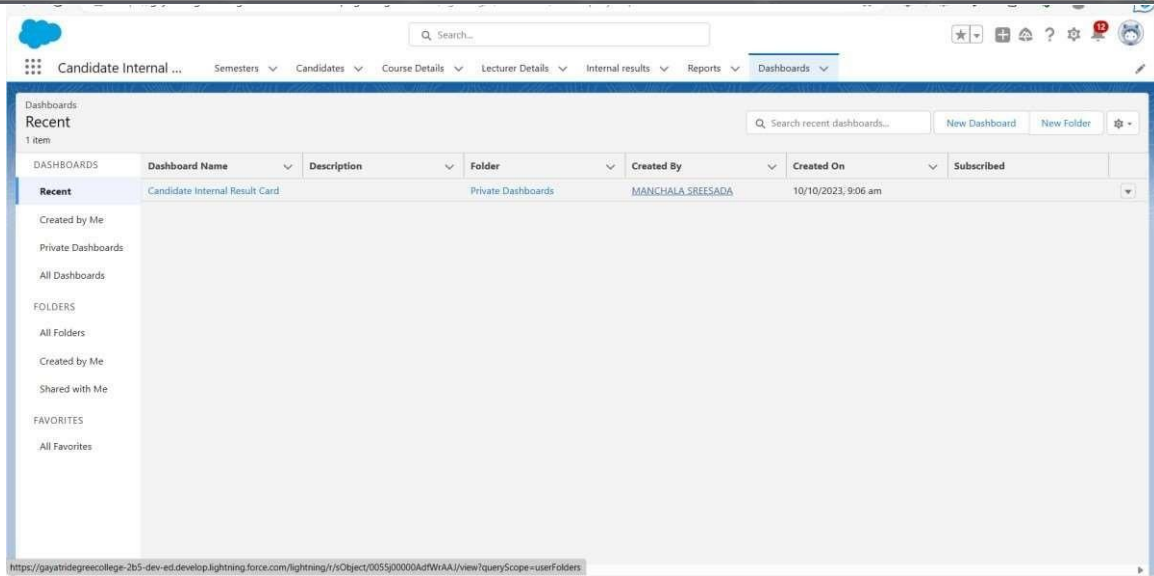
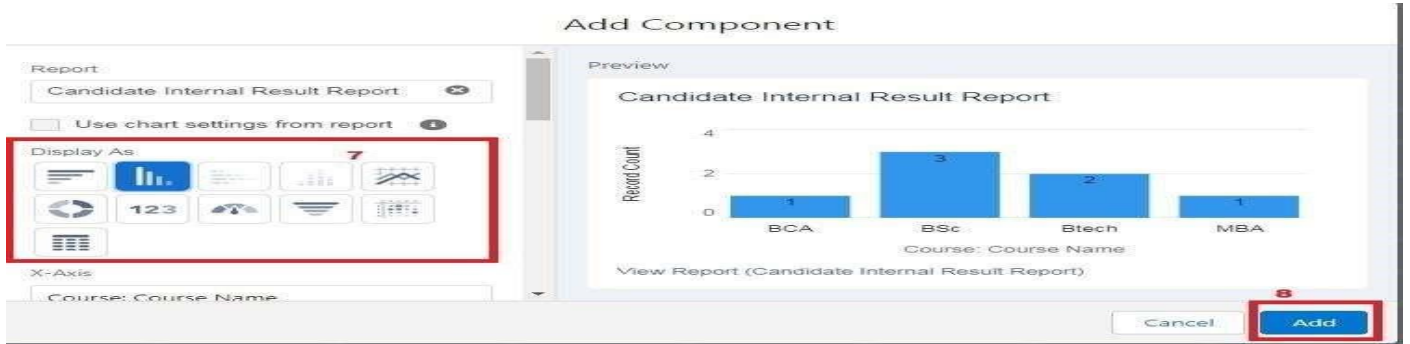
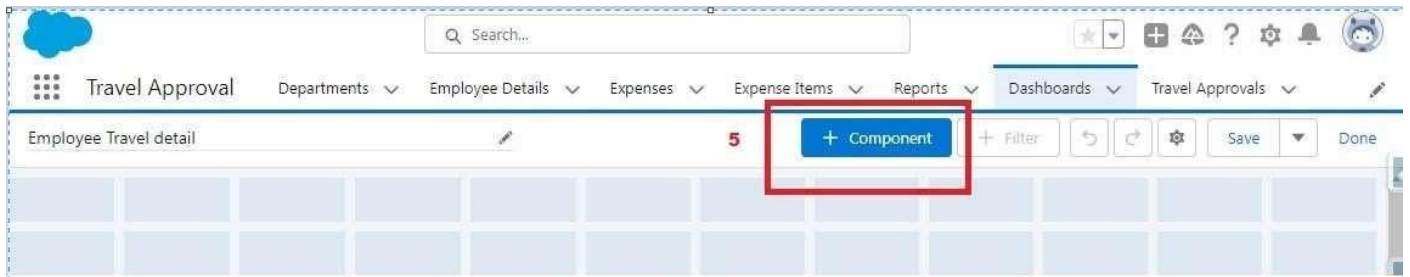
New Dashboard

Name
Candidate Internal Result Card |

Description

Folder
Private Dashboards Select Folder

Cancel Create



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 illustrates the steps to create a dashboard in Salesforce:

- Step 1:** Click the **Setup** icon (top left).
- Step 2:** Search for **Candidate Internal Result Card** in the **Apps** list.
- Step 3:** Click the **Dashboards** tab in the top navigation bar.
- Step 4:** Click the **Candidate Internal Result Card** dashboard in the **Recent** list.

The **Dashboards** page shows a table of recent dashboards:

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

The **Candidate Internal Result Card** dashboard displays a bar chart titled **Candidate Internal Result Report** showing the record count for different courses:

| Course | Record Count |
|---------|--------------|
| B. Tech | 2 |
| BCA | 1 |
| BSC | 3 |
| MBA | 1 |

Below the chart, there is a search bar for **Course: Course Name** and a link to **View Report (Candidate Internal Result Report)**.

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.

Create A Screen Flow

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow
4. It will open the canvas. Select (+)
5. Select the screen element from the drop down.
6. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label: Candidate info

API Name: Candidate_Info (This field will be auto populated.)

7. In search Component type text and drag the text component to 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.

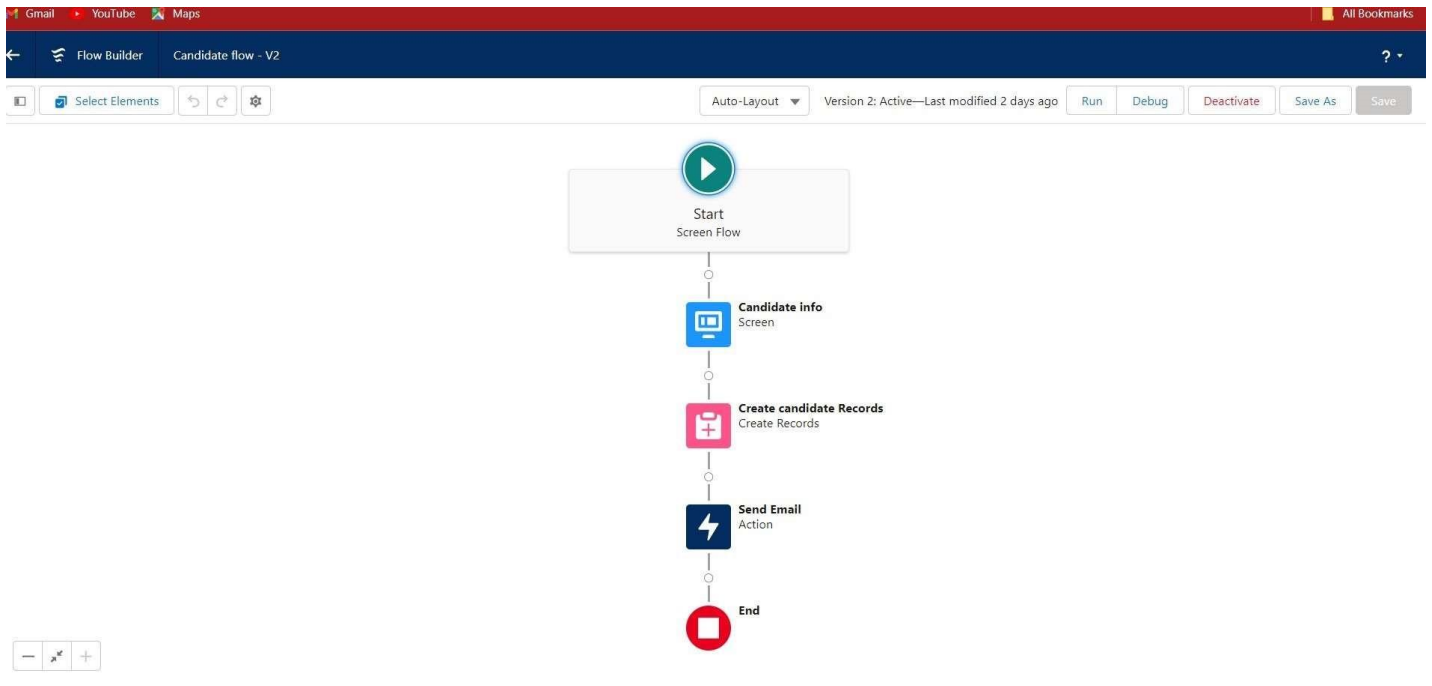
17. Enable Body and Give Hi {!Candidate_Name}, Welcome to the semester

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.

CreateAn 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.

The screenshot shows the 'App Details & Branding' configuration page in the Salesforce Lightning App Builder. The left sidebar contains a navigation menu with 'App Settings' selected, and sub-items: 'App Details & Branding' (active), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is divided into two columns: 'App Details' and 'App Branding'. The 'App Details' column has three text input fields: '* App Name' (containing 'Portfolio app'), '* Developer Name' (containing 'Portfolio_app'), and 'Description' (with a placeholder 'Enter a description...'). The 'App Branding' column includes an 'Image' upload area with an 'Upload' button, a 'Primary Color Hex Value' dropdown set to '#0070D2', and an 'Org Theme Options' checkbox labeled 'Use the app's image and color instead of the org's custom theme' (which is unchecked). At the bottom, an 'App Launcher Preview' shows a blue square icon with 'Pa' and a label 'Portfolio app'.

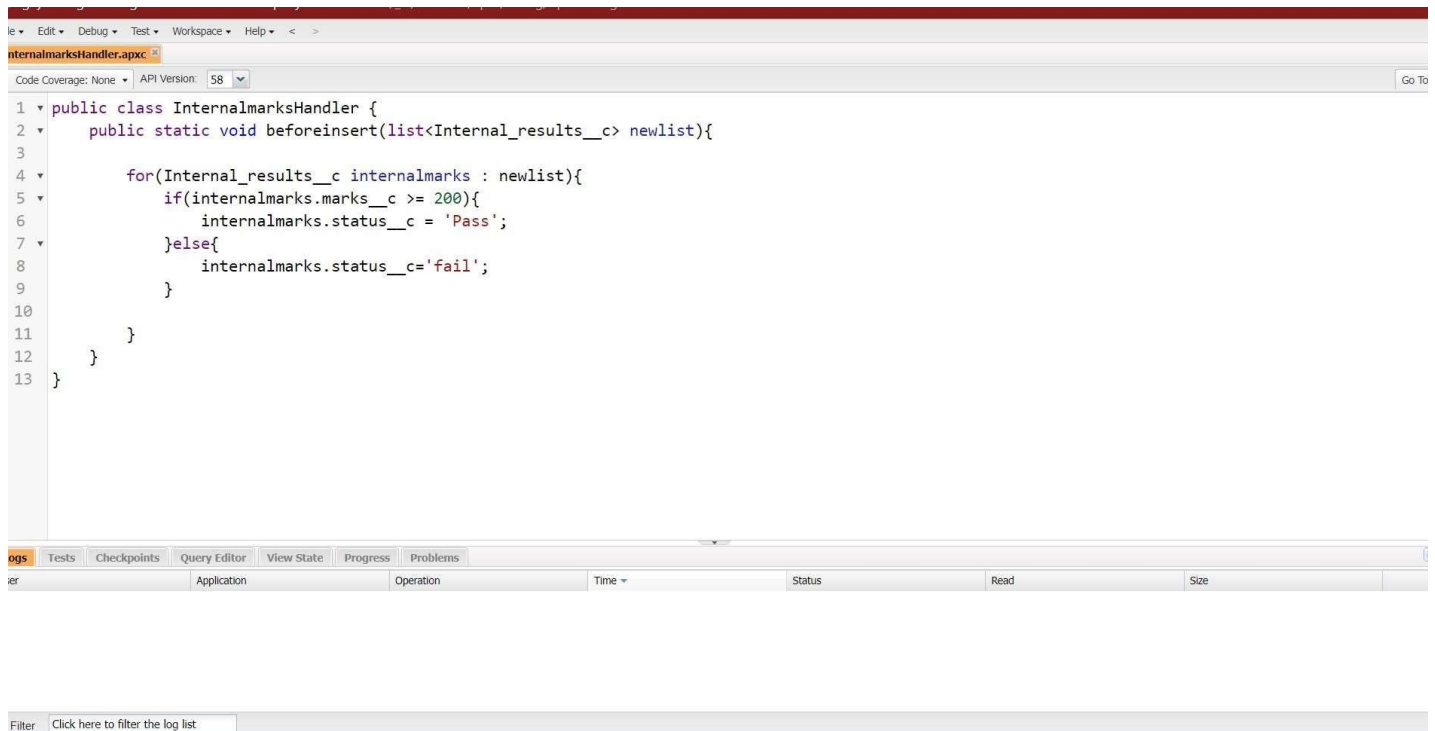
Triggers

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

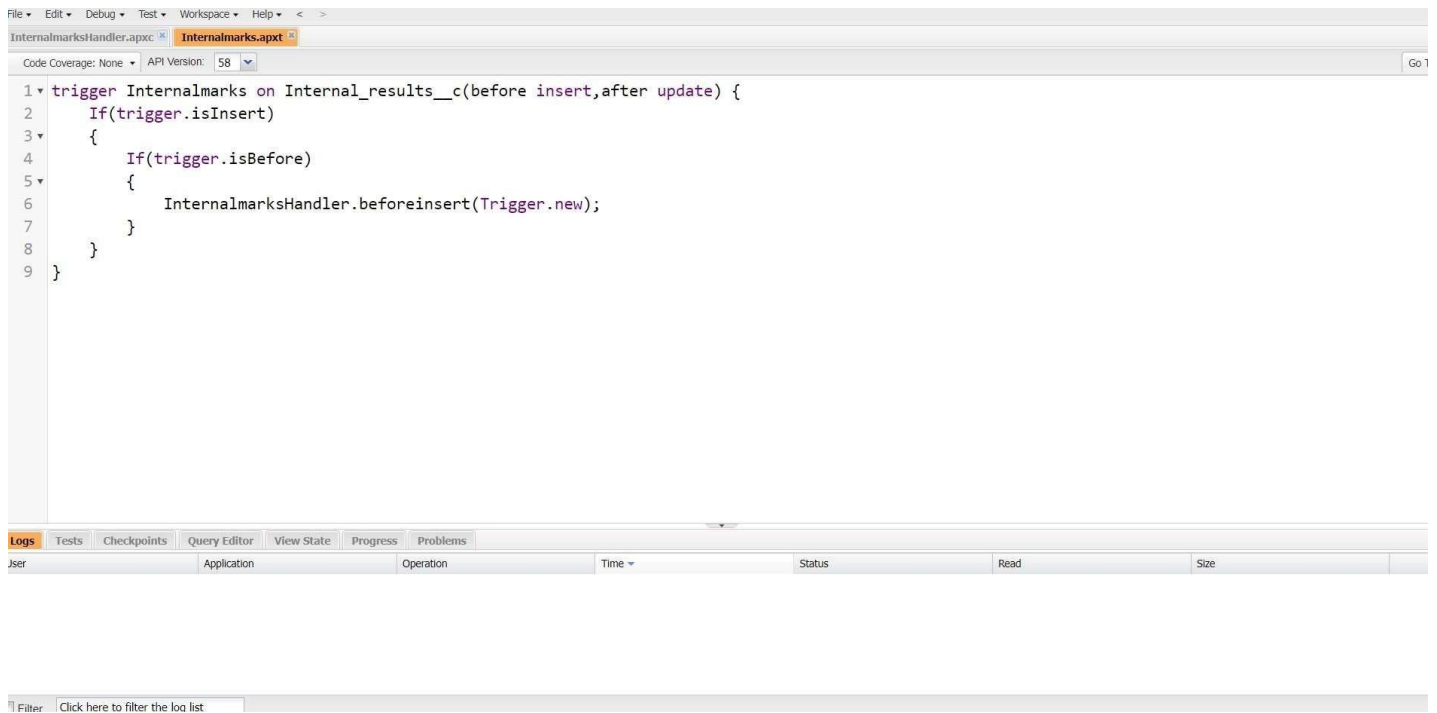
Whenever a internal Marks is inserted if the marks is greater than or equal to 200 it must update the status field to Pass or else it must update to fail

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

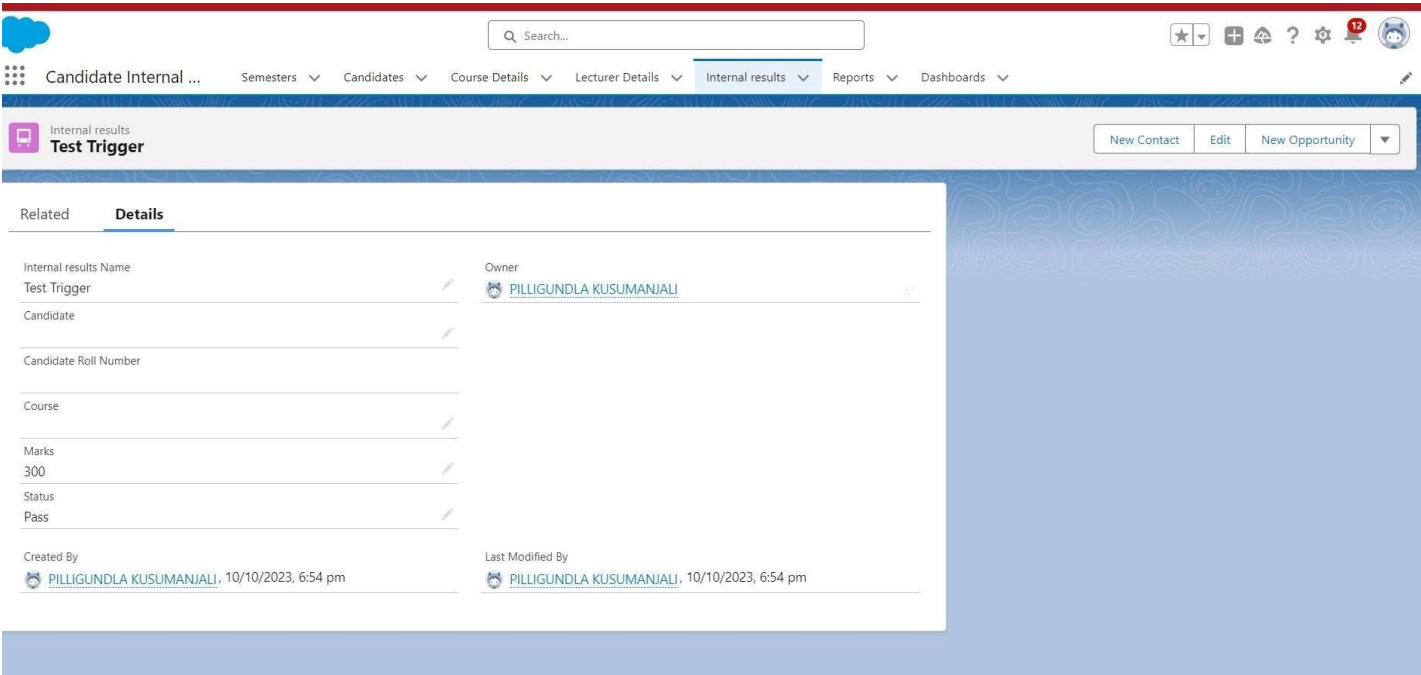


```
1 public class InternalmarksHandler {
2     public static void beforeinsert(list<Internal_results__c> newList){
3
4         for(Internal_results__c internalmarks : newList){
5             if(internalmarks.marks__c >= 200){
6                 internalmarks.status__c = 'Pass';
7             }else{
8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

5. From the menu bar click on file and select Apex trigger.
6. Now give the trigger name as Internalmarks
7. Now write the below code



8.Trigger Working as follows:
In the following record Marks field is given as 300,Now trigger triggers and status changes to Pass



THEEND

