

# SALESFORCE ADMINSTRATER GUIDED PROJECT

## Implementing CRM For Result Tracking Of A Candidate With Internal Marks - (ADMIN)

### TEAM DETAILS:

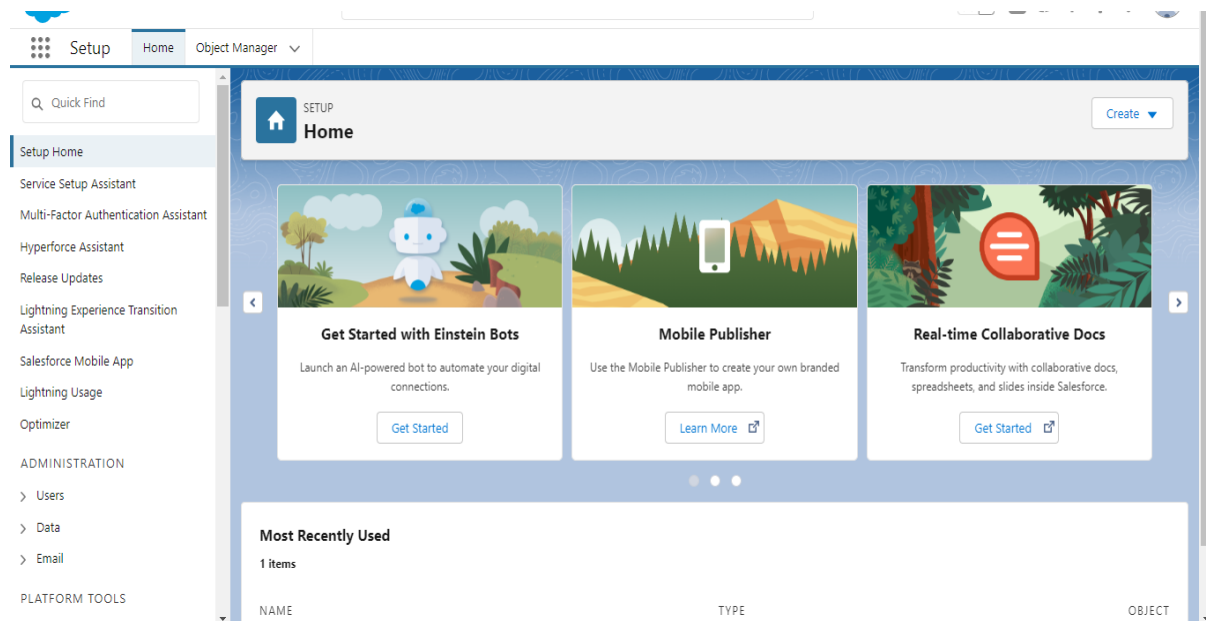
Team ID: LTVIP2023TMID07406

Team Leader:- MEESALA JYOTSNA.

Team Members:- Beena Guruprasad , Borra Ravindra , Gorle Sampathsai ,Koyyana Murali

### TASKS:

## 1.Create Salesforce Org



## 2. Object

Task:- Creation Of Semester Object For Candidate Internal Result Card .

Candidate object:

The screenshot shows the Salesforce Object Manager interface for the 'Candidate' object. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The details are organized into two columns. The left column contains: Description, API Name (Candidate\_\_c), Custom (checked), Singular Label (Candidate), Plural Label (Candidates), and Record Types. The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window.

Candidate	
Description	
API Name	Enable Reports
Candidate__c	✓
Custom	Track Activities
✓	Track Field History
Singular Label	Deployment Status
Candidate	Deployed
Plural Label	Help Settings
Candidates	Standard salesforce.com Help Window

Semester object:

The screenshot shows the Salesforce Object Manager interface for the 'Semester' object. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The details are organized into two columns. The left column contains: Description, API Name (Semester\_\_c), Custom (checked), Singular Label (Semester), Plural Label (Semesters), and Record Types. The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window.

Semester	
Description	
API Name	Enable Reports
Semester__c	✓
Custom	Track Activities
✓	Track Field History
Singular Label	Deployment Status
Semester	Deployed
Plural Label	Help Settings
Semesters	Standard salesforce.com Help Window

## Course details object:

SETUP > OBJECT MANAGER

Course Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Details

Description

API Name

Course\_Details\_\_c

Custom

✓

Singular Label

Course Details

Plural Label

Course Details

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

## Internal results:

SETUP > OBJECT MANAGER

Internal results

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

Details

Description

API Name

Internal\_results\_\_c

Custom

✓

Singular Label

Internal results

Plural Label

Internal results

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

## Lecturer details:

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

Details

Description

API Name

Lecturer\_Details\_\_c

Custom

✓

Singular Label

Lecturer Details

Plural Label

Lecturer Details

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

### 3.What Is A Tab?

#### Task: Creation Of Semester Tab For Candidate Internal Result Card

Q tabs

▼ User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?  
Try using Global Search.

SETUP  
Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Candidates	Building Block	
<a href="#">Edit</a>   <a href="#">Del</a>	Course Details	Boat	
<a href="#">Edit</a>   <a href="#">Del</a>	Internal results	Building	
<a href="#">Edit</a>   <a href="#">Del</a>	Lecturer Details	Cup	
<a href="#">Edit</a>   <a href="#">Del</a>	Semesters	Castle	

### 4. Lightning App

#### Task: Create The Candidate Internal Result Card App

Q app manager

▼ Apps

App Manager

Didn't find what you're looking for?  
Try using Global Search.

SETUP  
Lightning Experience App Manager

New Lightning App

New Connected App

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
1	All Tabs	AllTabSet		28/07/2023, 2:02 pm	Classic		▼
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/07/2023, 2:02 pm	Classic	✓	▼
3	App Launcher	AppLauncher	App Launcher tabs	28/07/2023, 2:02 pm	Classic	✓	▼
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designe...	28/07/2023, 2:05 pm	Lightning	✓	▼
5	Candidate Internal Result Ca...	Candidate_Internal_Result_Card		28/07/2023, 3:11 pm	Lightning	✓	▼
6	Community	Community	Salesforce CRM Communities	28/07/2023, 2:02 pm	Classic	✓	▼
7	Content	Content	Salesforce CRM Content	28/07/2023, 2:02 pm	Classic	✓	▼

## 5. Fields And Relationship

Task: Creation Of Text Field On "Lecturer Details" & Look Up Field For The “Candidate” Object

The screenshot shows the Salesforce Setup interface for the 'Lecturer Details' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Lecturer Role' and includes a 'Back to Lecturer Details' link and a 'Validation Rules (0)' link. Below this is the 'Custom Field Definition Detail' section, which includes an 'Edit' button and links for 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists the following details:

Field Label	Lecturer Role	Object Name	Lecturer Details
Field Name	Lecturer_Role	Data Type	Text
API Name	Lecturer_Role__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	jyotsna meesala 28/07/2023, 3:23 pm	Modified By	jyotsna meesala 28/07/2023, 3:23 pm

Below the table is the 'General Options' section with the following checkboxes:

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

The screenshot shows the Salesforce Setup interface for the 'Candidate' object, specifically the 'New Relationship' step. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Candidate' and includes a 'Help for this Page' link. Below this is the 'New Relationship' section, which includes a 'Step 6. Add custom related lists' header and a 'Step 6 of 6' indicator. The 'Field Information' table lists the following details:

Field Label	Semester Name
Data Type <td>Lookup</td>	Lookup
Field Name <td>Semester_Name</td>	Semester_Name
Description <td></td>	

Below the table is the 'Specify the title that the related list will have in all of the layouts associated with the parent.' section, which includes a 'Related List Label' field with the value 'Candidates'. The 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.' section includes a table with the following details:

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Semester Layout

At the bottom, there is a checkbox labeled 'Append related list to users' existing personal customizations' which is checked.

# Task: Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

SETUP > OBJECT MANAGER

Course Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Course Details

New Custom Field

Help for this Page

Step 4. Add to page layouts

Step 4 of 4

Previous Save & New Save Cancel

Field Label	Duration
Data Type	Number
Field Name	Duration
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name

Course Details Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

SETUP > OBJECT MANAGER

Internal results

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

Internal results Custom Field

Candidate Roll Number

Back to Internal results

Help for this Page

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Candidate Roll Number	Object Name	Internal results
Field Name	Candidate_Roll_Number		
API Name	Candidate_Roll_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	jyotsna.meesala, 28/07/2023, 5:22 pm	Modified By	jyotsna.meesala, 28/07/2023, 5:22 pm

Formula Options

Data Type Formula

Candidate\_\_r.Candidate\_Roll\_Number\_\_c

SETUP > OBJECT MANAGER

Candidate

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

Candidate

New Relationship

Help for this Page

Step 6. Add custom related lists

Step 6 of 6

Previous Save & New Save Cancel

Field Label	Candidate_c
Data Type	Lookup
Field Name	Candidate_c
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List

Page Layout Name

☒ Candidate Layout

☒ Append related list to users' existing personal customizations



## Task: View Record (Course Details)

The screenshot shows the 'Course Details' page for a course named 'BTech'. The page has a top navigation bar with a search bar and several menu items: 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details' (selected), 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. Below the navigation bar, there's a sub-header 'Course Details BTech' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content area is divided into two tabs: 'Related' and 'Details'. The 'Details' tab is active, showing a form with the following fields: 'Course Details Name' (BTech), 'Duration' (4.00), 'Created By' (jyotsna meesala, 28/07/2023, 5:40 pm), 'Owner' (jyotsna meesala), and 'Last Modified By' (jyotsna meesala, 28/07/2023, 5:40 pm).

## Task: Delete Record (Course Details)

The screenshot shows the 'Course Details' page with a 'Recently Viewed' section. The page has the same top navigation bar as the previous screenshot. Below the navigation bar, there's a sub-header 'Course Details Recently Viewed' with buttons for 'New', 'Import', and 'Change Owner'. The main content area shows a list of 3 items: 'Course Details Name', 'MTech', 'MBA', and 'BTech'. The 'MBA' item is selected, and a context menu is open with 'Edit' and 'Delete' options.

The screenshot shows the 'Course Details' page with a 'Recently Viewed' section. The page has the same top navigation bar as the previous screenshot. Below the navigation bar, there's a sub-header 'Course Details Recently Viewed' with buttons for 'New', 'Import', and 'Change Owner'. The main content area shows a list of 2 items: 'Course Details Name', 'MTech', and 'BTech'. A green confirmation message is displayed at the top: 'Course Details "MBA" was deleted. Undo'. The 'MBA' item has been removed from the list.



## 8.What Are Reports?

### Task: Create Report

Previewing a limited number of records: Run the report to see everything. Update Preview Automatically

**Outline** Filters 1

**Groups**

GROUP ROWS

Add group...

Course: Course Name

GROUP COLUMNS

Add group...

Course: Duration

**Columns**

Add column...

Semester: Semester Name

Course: Course Name	Course: Duration	2.00	4.00	Total
BTech	Record Count	0	8	8
MBA	Record Count	5	0	5
MTech	Record Count	4	0	4
<b>Total</b>	Record Count	9	8	17

Details (17 Rows) Click an intersection in the table above to filter details.

Semester: Semester Name

- One-One
- Three-one
- Two-One
- Two-Two
- Three-Two

Row Counts ☒ Detail Rows ☒ Grand Total ☒ Stacked Summaries ☒ Conditional Formatting

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

Report: Semesters with Course  
**Candidate Internal Result Report** Enable Field Editing Add Chart Edit

Total Records  
17

Course: Course Name	Course: Duration	2.00	4.00	Total
<input type="checkbox"/> BTech	Record Count	0	8	8
<input type="checkbox"/> MBA	Record Count	5	0	5
<input type="checkbox"/> MTech	Record Count	4	0	4
<b>Total</b>	Record Count	9	8	17

Details (17 Rows) Click an intersection in the table above to filter details.

Semester: Semester Name

- One-One
- Three-one
- Two-One
- Two-Two
- Three-Two

Row Counts ☒ Detail Rows ☒ Grand Total ☒ Stacked Summaries ☒

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

Report: Semesters with Course  
**Candidate Internal Result Report** Enable Field Editing Add Chart Edit

Total Records  
17

Course: Course Name	Semester: Semester Name	Duration
<input type="checkbox"/> BTech (8)	One-One	Large course
	One-Two	Large course
	Three-one	Large course
	Three-two	Large course
	Two-One	Large course
	Two-Two	Large course
	Three-one	Large course
	Three-Two	Large course
<b>Subtotal</b>		
<input type="checkbox"/> MBA (5)	One-One	Medium course
	One-One	Medium course

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

# Task: View Report

Candidate Internal ...SemestersCandidatesCourse DetailsLecturer DetailsInternal resultsReportsDashboards

ReportsRecent2 items

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name

Description

Folder

Created By

Created On

Subscribed

Candidate Internal Result Report

Private Reports

jyotsna meesala

30/7/2023, 3:59 pm

Candidate Internal Result Report

Private Reports

jyotsna meesala

30/7/2023, 3:39 pm

Candidate Internal ...SemestersCandidatesCourse DetailsLecturer DetailsInternal resultsReportsDashboards

Report: Semesters with CourseCandidate Internal Result Report

Enable Field Editing

Add Chart

Edit

Total Records17

Course: Course Name

Semester: Semester Name

Duration

BTech (8)

One-One

Large course

One-Two

Large course

Three-one

Large course

Three-two

Large course

Two-One

Large course

Two-Two

Large course

Three-one

Large course

Three-Two

Large course

Subtotal

MBA (5)

One-One

Medium course

One-One

Medium course

Row Counts

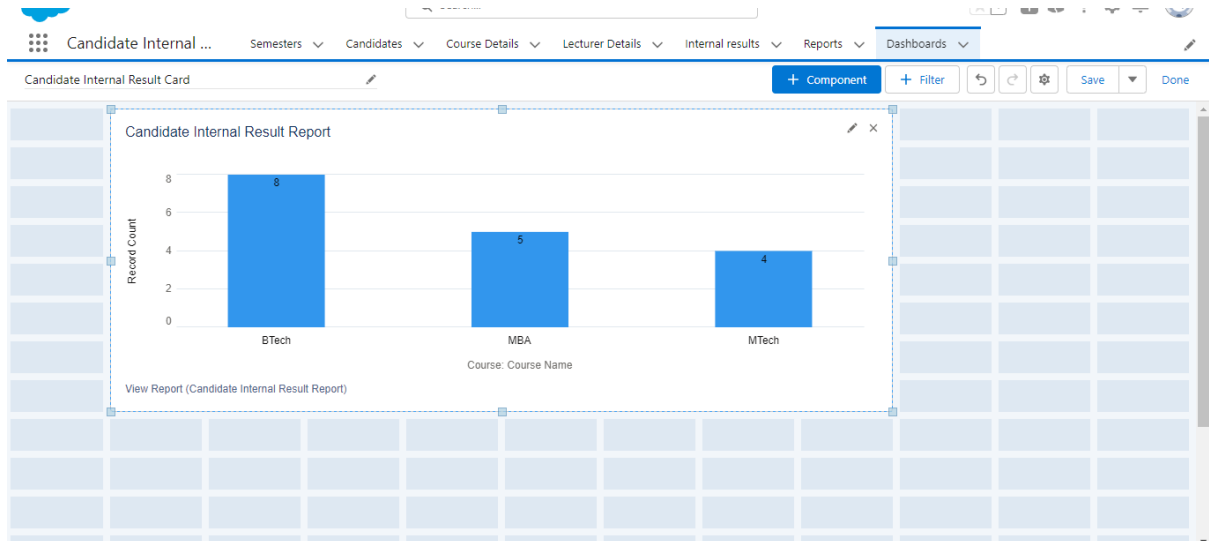
Detail Rows

Subtotals

Grand Total

## 9. Dashboards

### Task: Create Dashboard



### Task: View Dashboard

Dashboards

Recent

1 item

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	jyotsna meesala	30/7/2023, 4:12 pm	

