

A Project Report on
SALESFORCE ADMINSTRATER GUIDED PROJECT

*****Implementing CRM for Result Tracking Of a Candidate
with Internal Marks – (ADMIN)*****

by

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PROJECT DESCRIPTION

Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer. Lecturer should have the ability to create Internal Results. Dean, who is one of the Lecturers, should be the only one with ability to update Internal Results. Re-evaluation can be initialised by Candidate for all Internal Results. Have a multilevel approval process for the re-evaluation of the internal marks, 1st level by lecturer and 2nd level by dean. Now only dean can update the marks after re-evaluation. Dean should be able to see list of Candidates grouped by Marks (Pass / Fail) in each Semester – should be a VisualForce page. Dean should be able to see average percentage of each Course for a Candidate. Dean should have the ability to view Pass percentage for each Semester.

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CHAPTER 1 CREATING SALESFORCE ORG

INTRODUCTION

Salesforce operates on the concept of organizations, or orgs. As [defined by Salesforce](#) an org is: *"A deployment of Salesforce with a defined set of licensed users. An organization is the virtual space provided to an individual customer of Salesforce. Your organization includes all of your data and applications, and is separate from all other organizations."*

When a customer purchases Salesforce, they are provided with an org which acts as the container for all their data.

Types of org

There are two broad categories of org:

- Production instances
- Development instances

1.1 Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/Signup
2. Click on sign up.
3. On the sign-up form, enter the following details:
 1. First name & Last name
 2. Email
 3. Role: Developer
 4. Company: College Name
 5. County: India
 6. Postal Code: pin code
 7. Username: should be a combination of your name and company This need not be an actual email id, you can give anything in the

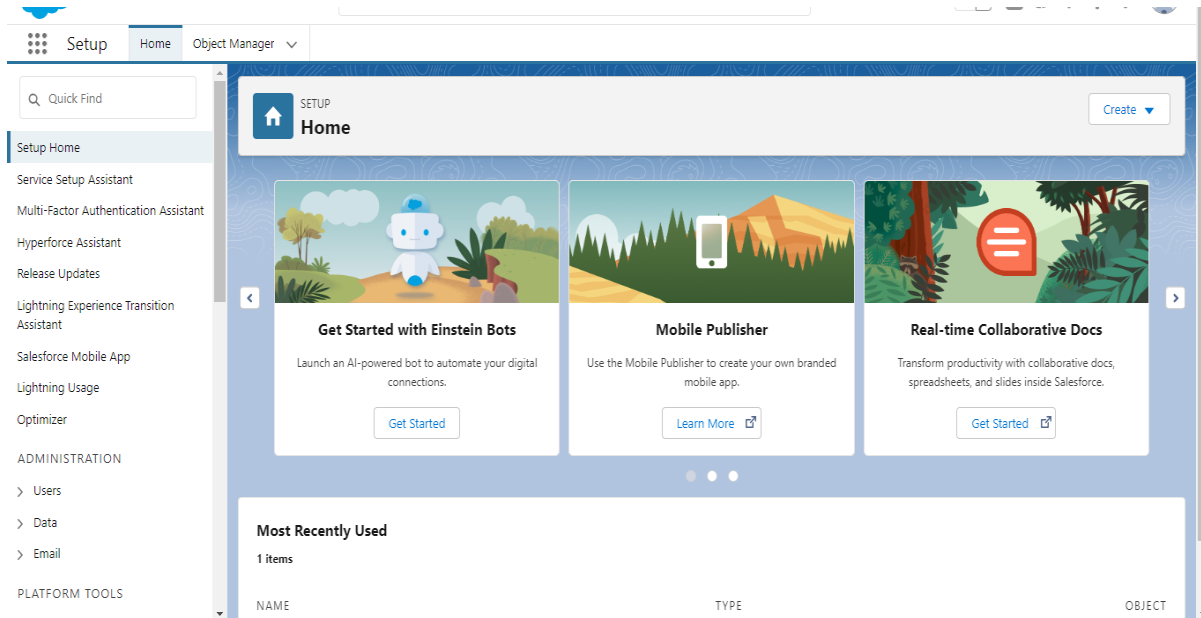
The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a blue banner with the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further 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". On the right, there's a white sign-up form titled "Sign up for your Salesforce Developer Edition" with the subtitle "A full-featured copy of the Platform, for free". The form includes fields for "First Name" (filled with "Iyotina"), "Last Name" (filled with "meesala"), "Email" (filled with "Iyotinameesala29@gmail.com"), "Role" (a dropdown menu with "Developer" selected), "Company" (filled with "abc"), "Country/Region" (a dropdown menu with "India" selected), "Postal Code" (filled with "532409"), and "Username" (filled with "salesforce@additionproject.com"). Below the username field, there's 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." There's a checkbox labeled "I agree to the Main Services Agreement + Developer Services and Salesforce Program Agreement" which is checked. At the bottom, there's a small text: "By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the Privacy Statement."

1.2 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

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



CHAPTER 2 OBJECT INTRODUCTION

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

2.1 Creation Of Semester Object For Candidate Internal Result Card

Candidate object:

The screenshot shows the Salesforce Setup page for the 'Candidate' object. The left sidebar contains a menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Details' section is selected, and the main content area displays the following information:

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

Semester object:

The screenshot shows the Salesforce Setup page for the 'Semester' object. The left sidebar contains a menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is selected, and the main content area displays the following information:

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

Course details object

The screenshot shows the Salesforce Setup page for the 'Course Details' object. The left sidebar contains a menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Details' section is selected, and the main content area displays the following information:

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	

Internal results object:

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

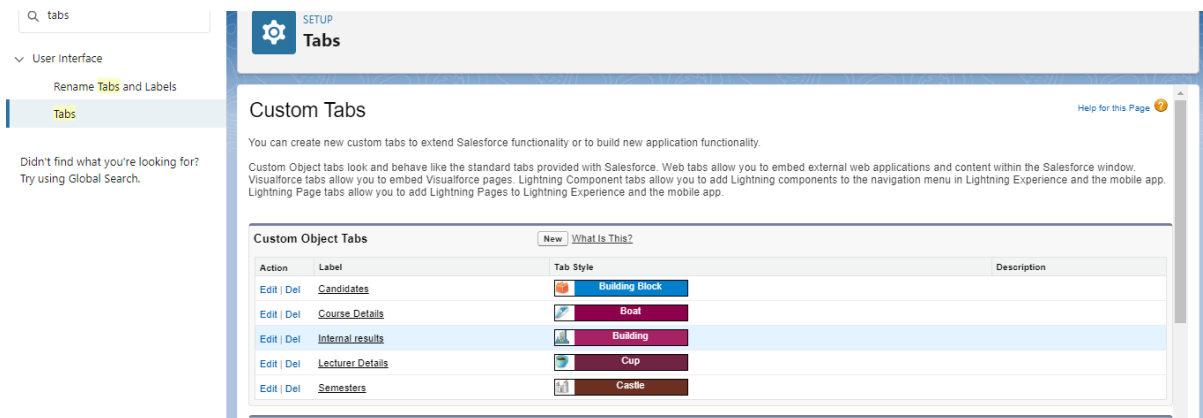
CHAPTER 3 WHAT IS A TAB?

INTRODUCTION

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 display data related to custom objects.
- (C) Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tab.
- (D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

3.1 Creation Of Semester Tab For Candidate Internal Result Card



Search tabs

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.

Action	Label	Tab Style	Description
Edit Del	Candidates	Building Block	
Edit Del	Course Details	Boat	
Edit Del	Internal results	Building	
Edit Del	Lecturer Details	Cup	
Edit Del	Semesters	Castle	

CHAPTER 4 LIGHTNING APP

INTRODUCTION

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.

4.1 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, Internal results, Reports, and Dashboards and move them to Selected Items.
7. Click Next. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

Q app manager

Apps

App Manager

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

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	✓	

CHAPTER 5 FIELDS AND RELATIONSHIP

INTRODUCTION

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 related data.

5.1 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.

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

Lecturer Role
[Back to Lecturer Details](#) [Validation Rules \(0\)](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

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

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>

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 Semester Name
Data Type Lookup
Field Name Semester_Name
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
<input checked="" type="checkbox"/>	Semester Layout

☒ Append related list to users' existing personal customizations

SETUP > OBJECT MANAGER

Internal results

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	hyotsna meesala 28/07/2023, 5:22 pm	Modified By	hyotsna meesala 28/07/2023, 5:22 pm

Formula Options

Data Type	Formula
Candidate__r.Candidate_Roll_Number__c	

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.

SETUP > OBJECT MANAGER

Candidate

Fields & Relationships
7 Items, Sorted by Field Label

[Q, Quick Find](#) [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate	Candidate__c	Lookup(Candidate)		✓
Candidate Name	Name	Text(80)		✓
Candidate Roll Number	Candidate_Roll_Number__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name__c	Lookup(Semester)		✓

5.2 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
5. 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.

The screenshot shows the Salesforce Object Manager interface for the 'Course 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 'Fields & Relationships' and shows a list of 6 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Duration	Duration__c	Number(1, 2)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester	Semester__c	Lookup(Semester)		✓

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

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

SETUP > 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

PreviousSave & NewSaveCancel

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

EditSet Field-Level SecurityView Field AccessibilityWhere 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	

CHAPTER 6 USER

INTRODUCTION

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account

6.1 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.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area displays the 'New User' form for a user named 'Class Teacher'. The form includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The 'User License' is set to 'Salesforce', and the 'Profile' is 'Standard User'. The 'Active' checkbox is checked. A tooltip is visible over the 'Division' field, showing 'User: Class Teacher - Salesforce - Developer Edition'.

User Detail	
Name	Class Teacher
Alias	ctec
Email	jyotsnameesala39@gmail.com (Verify)
Username	classteacher112@salesforce.com
Nickname	User16905456373911915887
Title	
Company	
Department	
Division	User: Class Teacher - Salesforce - Developer Edition
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Role	Salesforce
User License	Salesforce
Profile	Standard User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View

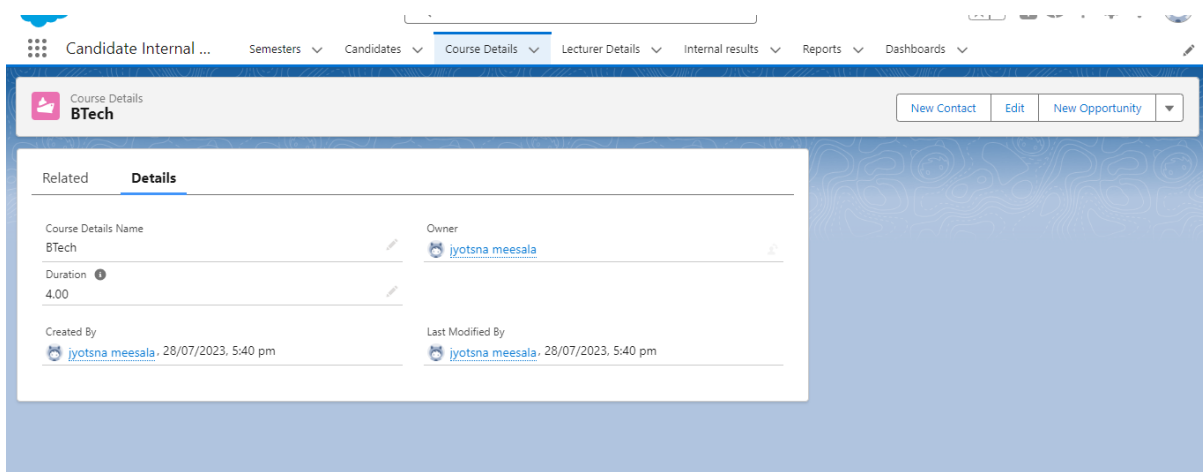
CHAPTER 7 USER ADOPTION

INTRODUCTION

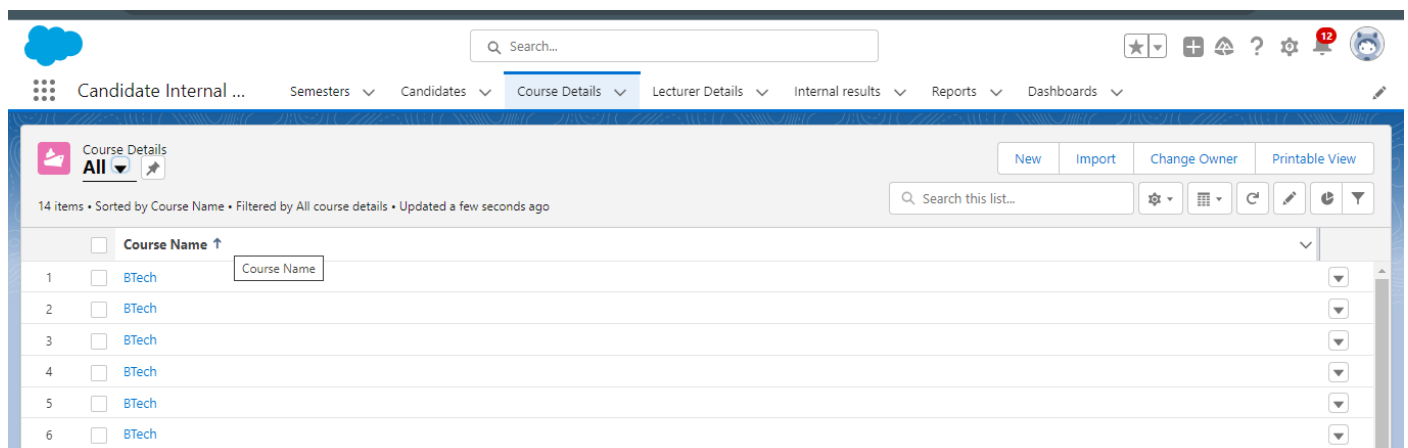
Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

7.1 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.



7.2 View Record



7.3 Delete Record 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.

Candidate Internal ...

Semesters

Candidates

Course Details

Lecturer Details

Internal results

Reports

Dashboards

Course Details

Recently Viewed

3 items • Updated a minute ago

Search this list...

NewImportChange Owner

Course Details Name

1

2

3

MTEch

MBA

BTech

Edit

Delete

Candidate Internal ...

Semesters

Candidates

Course Details

Lecturer Details

Internal results

Reports

Dashboards

Course Details

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

NewImportChange Owner

Course Details Name

1

2

MTEch

BTech

Course Details "MBA" was deleted. Undo

CHAPTER 8 WHAT ARE REPORTS?

INTRODUCTION

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 sub total, 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 29 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 and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

Manager: With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

8.1 Create Report

1. Click App Launcher
2. Select Candidate Internal Result Card App
3. Click reports tab
4. Click New Report.
5. Click the report type as Semesters with Course Click Start report.
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a Matrix Report).
7. Click refresh
8. Click save and run
9. Give report name – Candidate Internal Result Report
10. Click Save NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).

The screenshot shows the report builder interface. On the left, the 'Fields' panel is open, showing 'Groups' with 'Course: Course Name' and 'GROUP COLUMNS' with 'Course: Duration'. The 'Columns' section shows 'Semester: Semester Name'. The main preview area displays a table with columns for Course Name, Duration, and Total. The table data is as follows:

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
Total	Record Count	9	8	17

Below the table, the 'Details (17 Rows)' section is visible, showing a list of semesters: 1 One-One, 2 Three-one, 3 Two-One, 4 Two-Two, 5 Three-Two. The bottom of the interface shows various toggle options: Row Counts (checked), Detail Rows (checked), Grand Total (checked), Stacked Summaries (checked), and Conditional Formatting.

The screenshot shows the final report titled 'Candidate Internal Result Report'. The report displays the same table as the previous screenshot, but with checkboxes next to the course names (BTech, MBA, MTech). The 'Total' row is highlighted in blue. The 'Details (17 Rows)' section is also visible, showing the list of semesters. The bottom of the interface shows the same toggle options as the previous screenshot.

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.

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 ☒

8.2 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.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report		Private Reports	jyotsna meesala	30/7/2023, 3:59 pm	
Created by Me	Candidate Internal Result Report		Private Reports	jyotsna meesala	30/7/2023, 3:39 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						



Report: Semesters with Course

Candidate Internal Result Report

Enable Field Editing



Add Chart



Edit

Total Records

17

<input type="checkbox"/> 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
Subtotal		
<input type="checkbox"/> MBA (5)	One-One	Medium course
	One-One	Medium course

Row Counts



Detail Rows



Subtotals



Grand Total



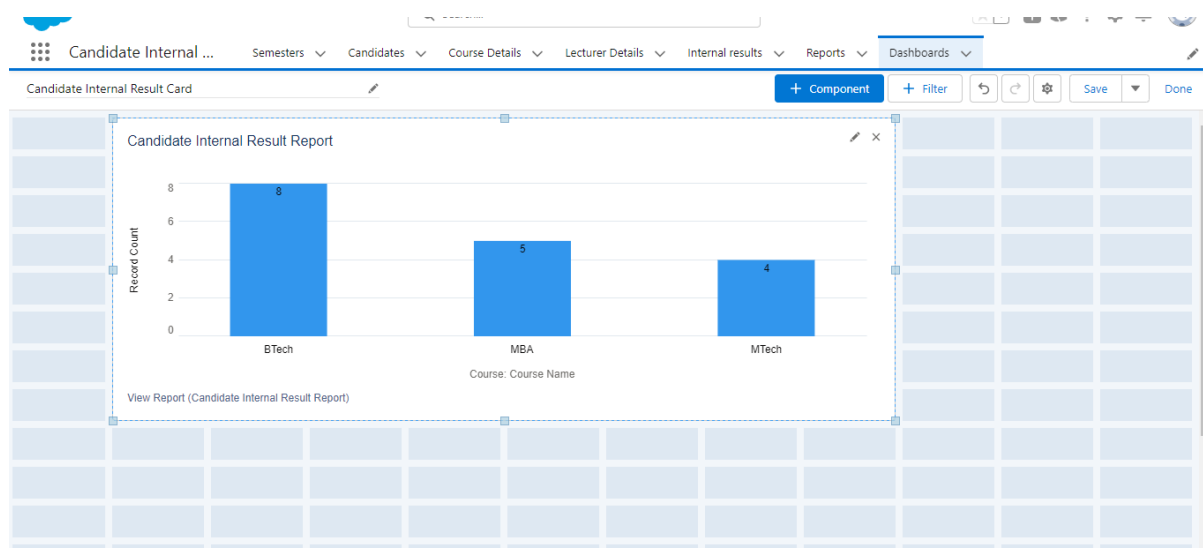
CHAPTER 9 DASHBOARDS

INTRODUCTION

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.

9.1 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.



9.2 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

Dashboards

Recent

1 item

Search recent dashboards...

New Dashboard New Folder

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

Created by Me

Private Dashboards

All Dashboards

FOLDERS

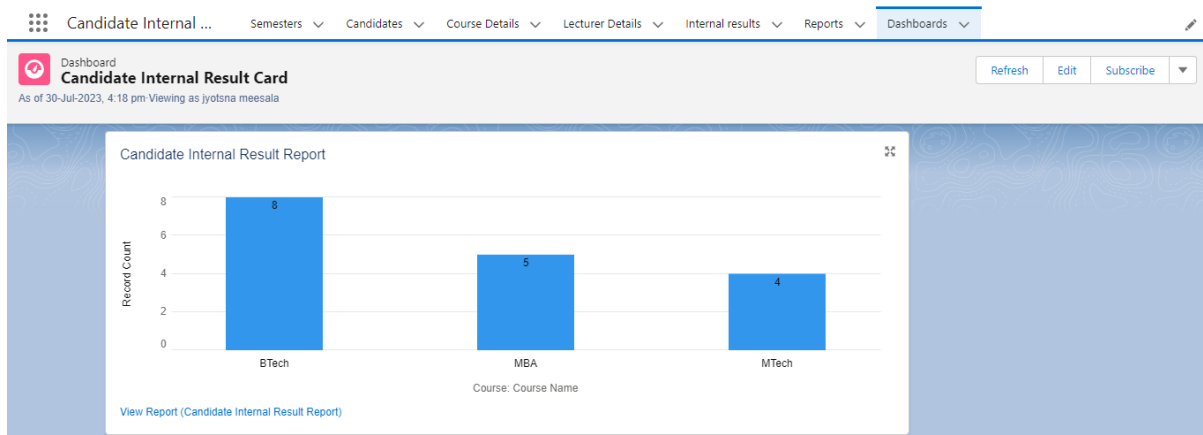
All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites



CHAPTER 10 EXPERIMENTAL RESULTS

Candidate Internal ...SemestersCandidatesCourse DetailsLecturer DetailsInternal resultsReportsDashboards

Dashboards

Recent

1 item

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

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

Candidate Internal ...SemestersCandidatesCourse DetailsLecturer DetailsInternal resultsReportsDashboards

Dashboard

Candidate Internal Result Card

As of 30-Jul-2023, 4:18 pm Viewing as jjyotsna meesala

RefreshEditSubscribe

Candidate Internal Result Report

Course	Record Count
BTech	8
MBA	5
MTech	4

View Report (Candidate Internal Result Report)

11.Advantages & Disadvantages:

Advantages:

- It is used to tracking the internal results of the students.
- It tracks of students data.
- Provides streamline operations.

Disadvantages:

- If manual error occurs during the feeding of data it is difficult to be altered.
- Having lots of security concerns.
- It can be accessed by third party

12.Conclusion:

- It is easiest method to track the students internal result and also it can be tracked anywhere through online mode.

Future Scope:

- Students date of birth can be included for verifying students.
- External marks can included so result analysis can be done easily.

Trailhead Profile Public URL:

Team leader: <https://www.salesforce.com/trailblazer/jmeesala2>