



IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS (DEV)-(SHORT -TERM)

Team ID : LTVIP2023TMID11614

Team Size : 01

Team Leader : S SURENDRA

The project aim is to provide real time knowledge for all the students who have basic knowledge of a salesforce and looking for real-time project . this project will also help those professionals who are in cross technology and want to switch to salesforce with the help of this project they will gain knowledge and can included it into their resume as well

Creation Of Semester Object For Candidate Internal Result Card

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

10. Click Save.

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





SETUP

New Custom Object

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Example: Account

Plural Label

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Example: Account

Description

Context-Sensitive Help Setting

- ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

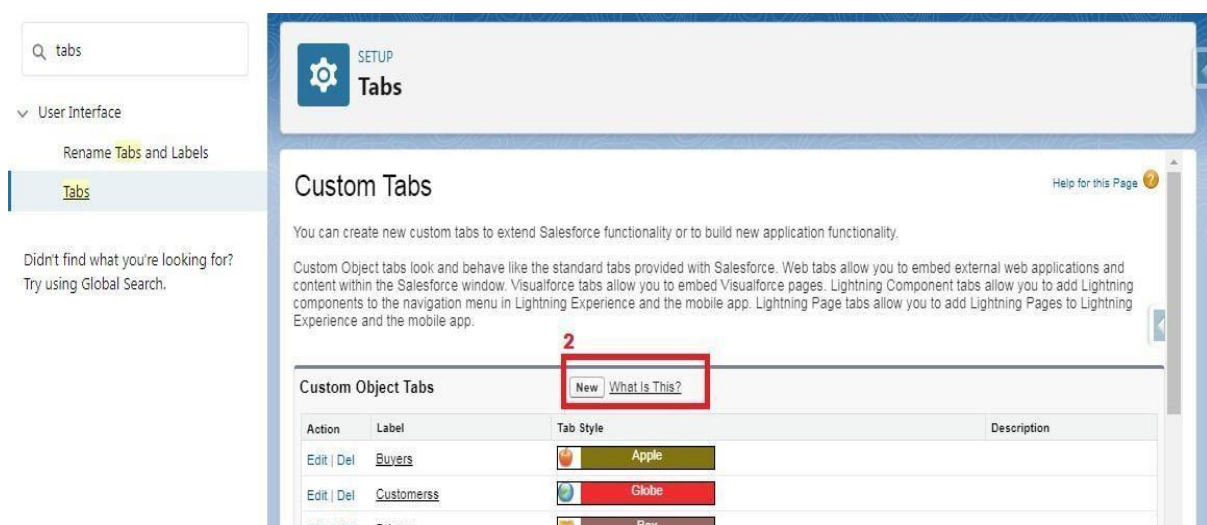
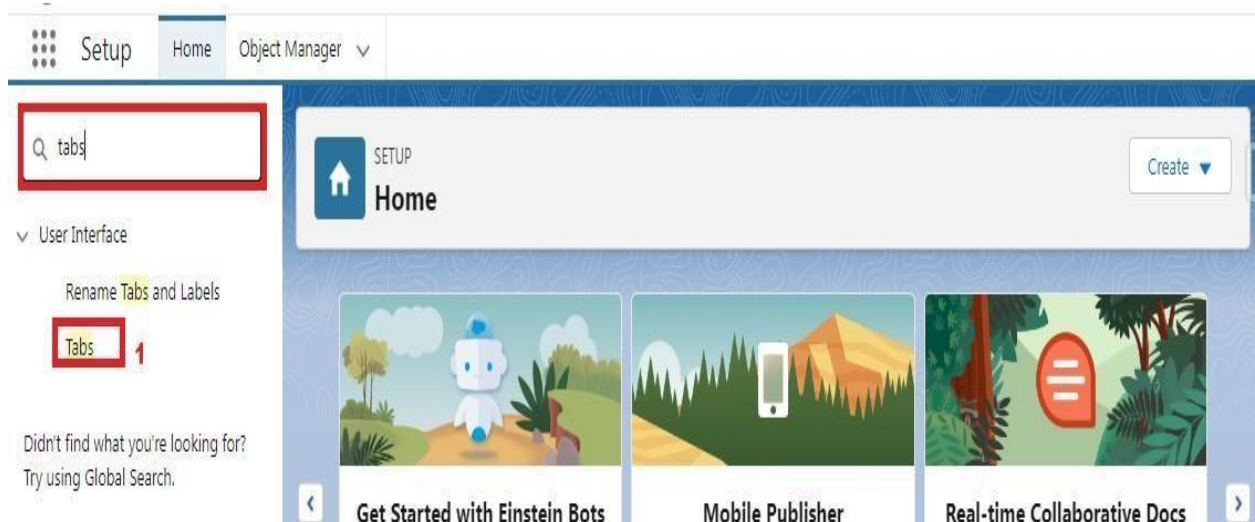
Record Name

Example: Account Name

Creation Of Semester Tab For 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 .



Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

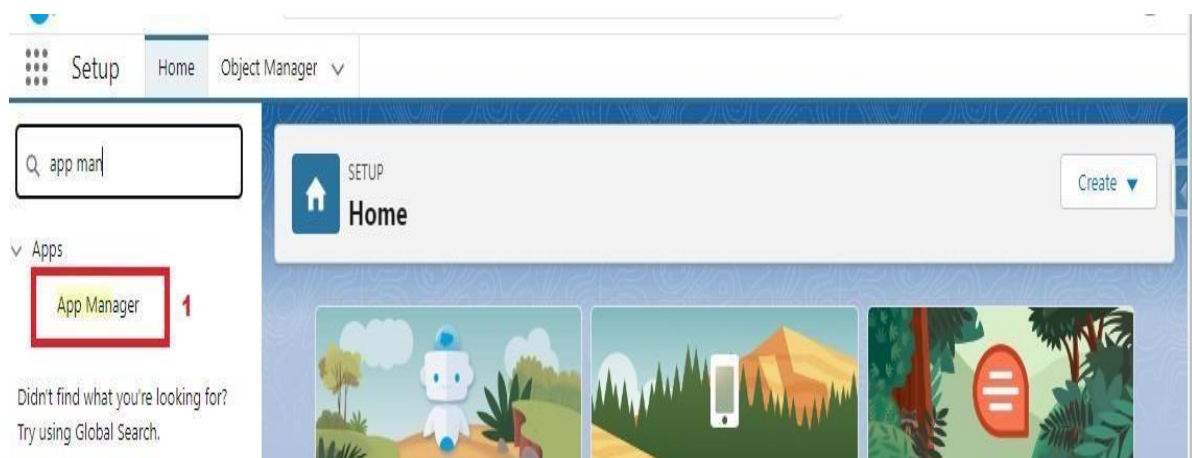
Select an existing custom object or create a new custom object now.

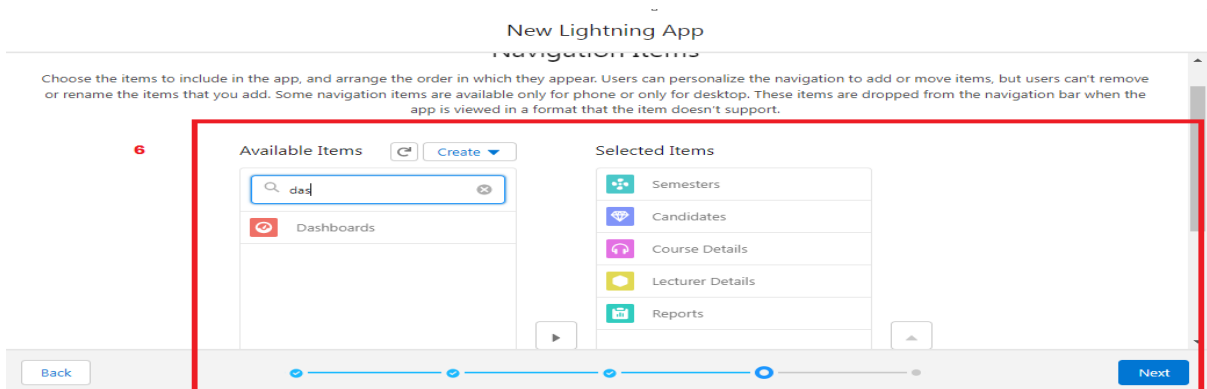
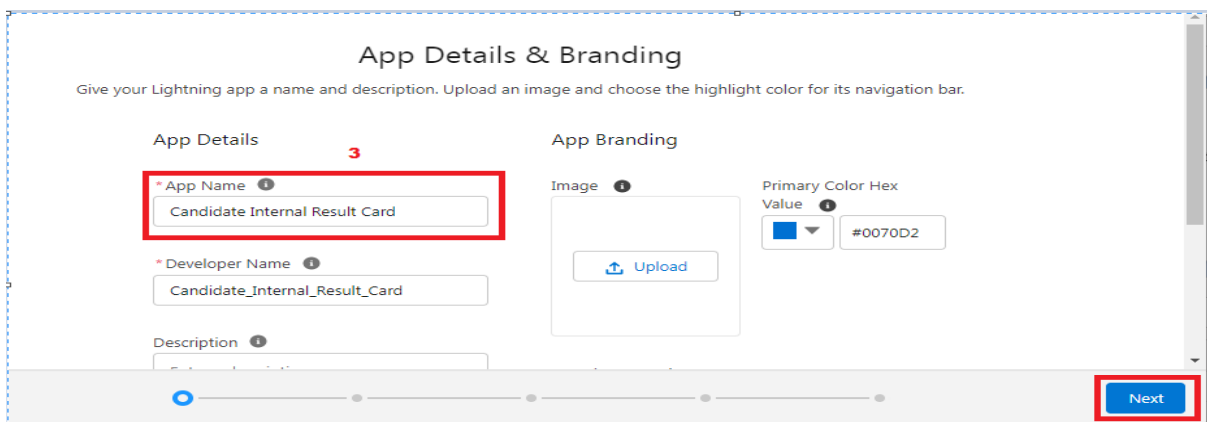
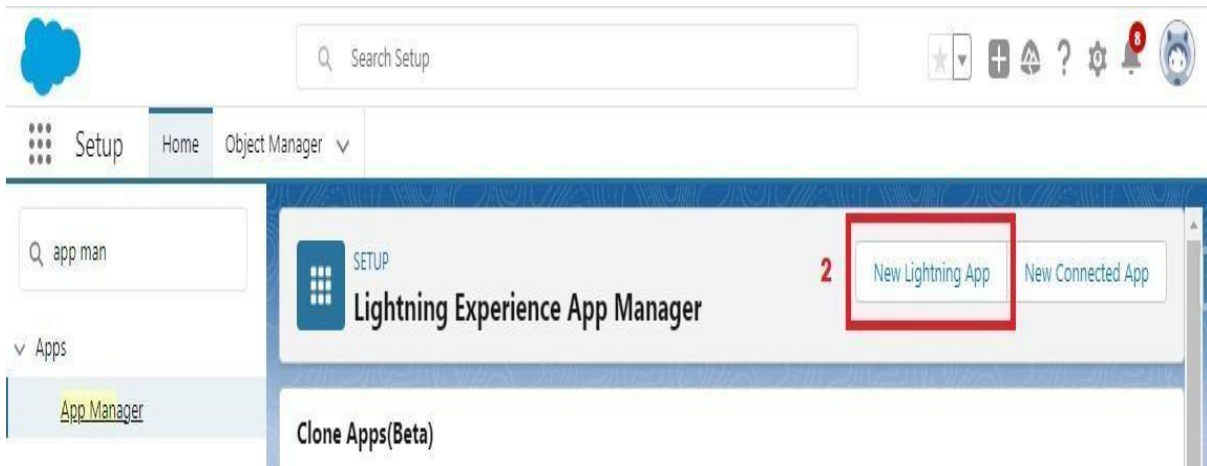
Object **--None--** 3

Tab Style 4

Create The Candidate Internal Result Card App

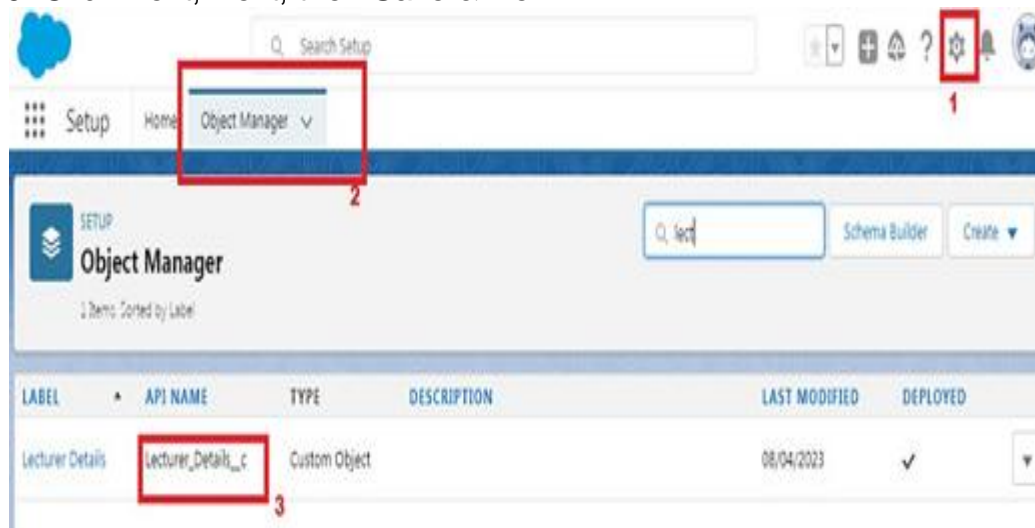
1. From Setup, enter App Manager in the Quick Find and select App Manager.
 2. Click New Lightning App.
 3. Enter **Candidate Internal Result Card** as the App Name, then click next
 4. Under App Options, leave the default selections and click next.
 5. Under Utility Items, leave as is and click Next.
 6. From Available Items, select **Semester, Candidate, Course Details, Lecturer Details, Internalresults, 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.





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.



<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number. For example, "10" and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text 6	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 355 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) 7	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:45 PM", "14:45", "14:45:00", and "14:45:00.000" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details
Step 2 of 4

Previous
Next 9
Cancel

Field Label 7

Length 8

Field Name 8

Description

Help Text

Next

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.



Step 2. Choose the related object

Previous Next Cancel

Select the other object to which this object is related.

Related To Semester

Previous Next Cancel

7

Field Label Semester Name

Field Name Semester Name

Description

Help Text

8

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.



Field Label **Candidate Roll Number** **7** Field Name **Candidate_Roll_Number** **1**

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity **1**

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_p)`

☐ 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: `(Next * NOW()) * 1`

☐ Number Calculate a numeric value.
Example: `(Fahrenheit * 1.8 * Celsius_c * 32)`

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

☒ **Text** **8** Create a text string, for example, by concatenating other text fields.
Example: `(Full Name *) & " is a " & First Name`

Example: `Full Name * LastName & ", " & FirstName` **More Examples...**

Simple Formula **Advanced Formula**

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

Candidate roll Number (Text) =

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
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__r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c
Insert

Close

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.



Step 2. Enter the details

Step 2 of 4

[Previous](#) [Next](#) [Cancel](#)Field Label Display Format Example: A-(0000) [What is This?](#)Starting Number ☐ Generate auto number for existing recordsField Name Description Help Text

7

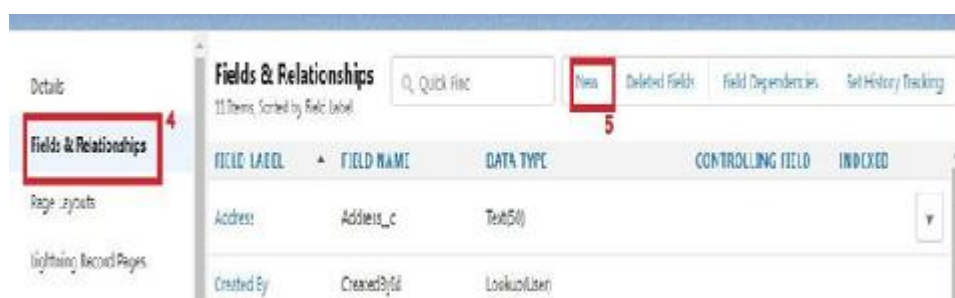
9

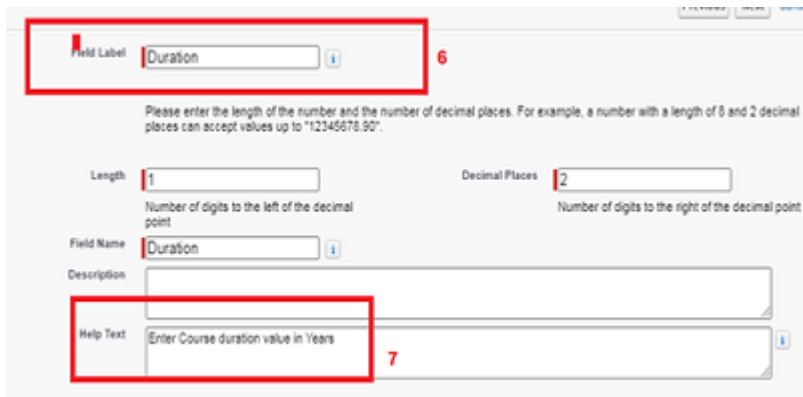
8

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

Let's create a Number field on Course Details object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next
6. For Field Label Duration, enter.
7. Give Help Text- Enter Course duration value in Years
8. Click Next, Next, then Save & New.





Field Label: Duration (6)

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 1 (Number of digits to the left of the decimal point)

Decimal Places: 2 (Number of digits to the right of the decimal point)

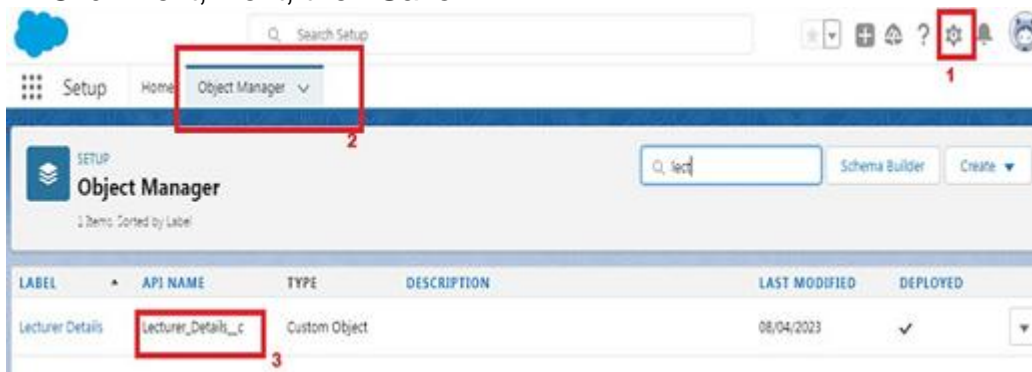
Field Name: Duration

Description:

Help Text: Enter Course duration value in Years (7)

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.



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**

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: `Gross Margin = Amount - Cost`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

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

☐ Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius + 32`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount) / Amount`

☒ **Text** 8 Create a text string, for example, by concatenating other text fields.
Example: `F.D Name & " is a " & LastName`

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

☐ Simple Formula ☒ **Advanced Formula**

Insert Field 9 Insert Operator

Candidate Roll Number (Text) =

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
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 >	Candidate >	Address
\$Api >	Candidate >	Candidate Name
\$Organization >	Created By >	Candidate Roll Number
\$Profile >	Created By ID	City
\$System >	Created Date	Created By >
\$User >	Internal results Name	Created By ID
\$UserRole >	Last Modified By >	Created Date
	Last Modified By ID	Education
	Last Modified Date	Email

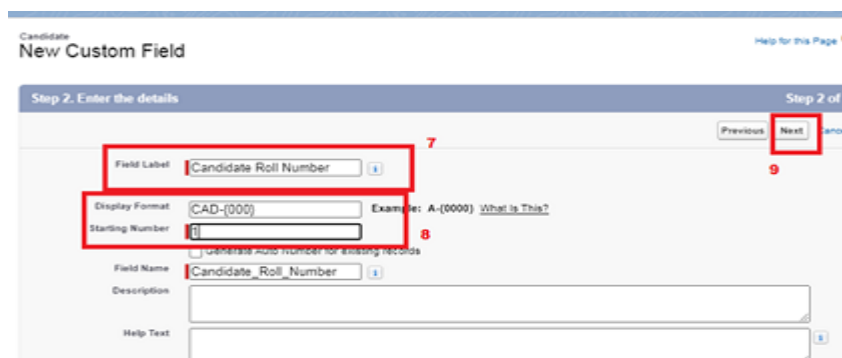
You have selected:
Candidate__r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c

Insert

Close

Now Let's create an auto number field on Candidate object

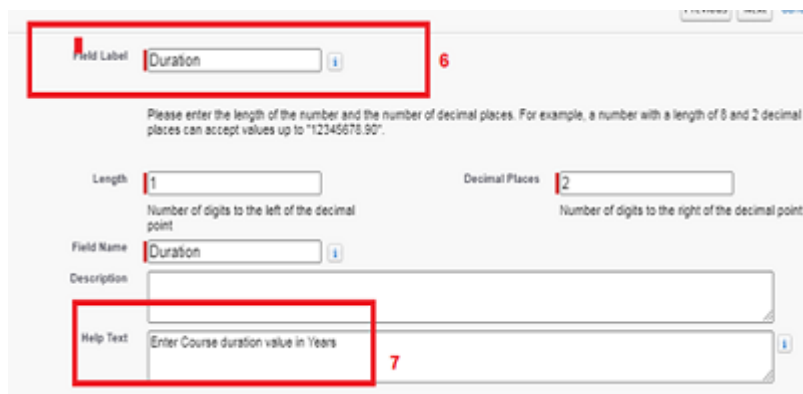
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate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



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

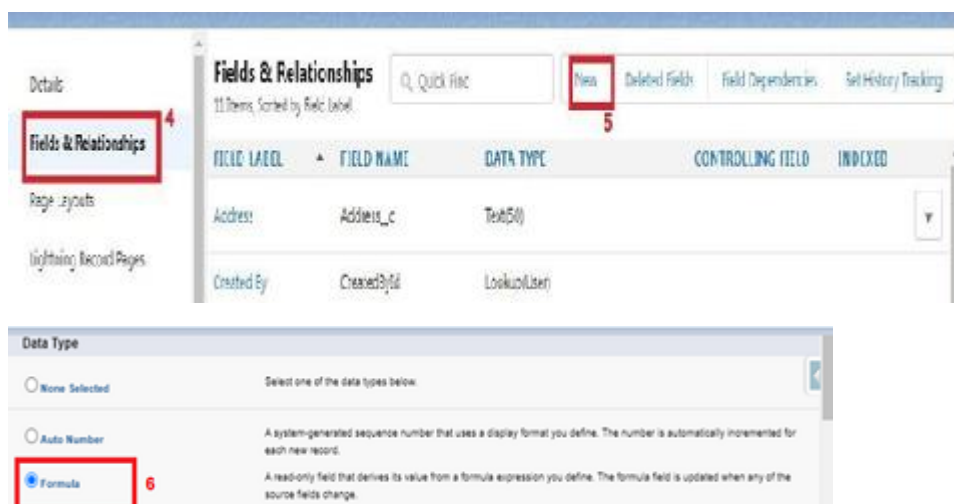
Let's create a Number field on Course Details object

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 **Candidate Roll Number** 7 Field Name **Candidate_Roll_Number** 1

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity 1

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_p`

☐ 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: `Next + NOW() + 1`

☐ Number Calculate a numeric value.
Example: `Fahrenheit * 1.8 * Celsius_c + 32`

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

☒ **Text** 8 Create a text string, for example, by concatenating other text fields.
Example: `(Full Name *) & " is a " & FirstName`

Example: `Full Name * LastName & ", " & FirstName` More Examples...

Simple Formula Advanced Formula

Insert Field 9 Insert Operator

Candidate Roll Number (Text) *

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
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 >	Candidate >	Address
\$Api >	Candidate >	Candidate Name
\$Organization >	Created By >	Candidate Roll Number
\$Profile >	Created By ID	City
\$System >	Created Date	Created By >
\$User >	Internal results Name	Created By ID
\$UserRole >	Last Modified By >	Created Date
	Last Modified By ID	Education
	Last Modified Date	Email

You have selected:
Candidate_r.Candidate_Roll_Number__c

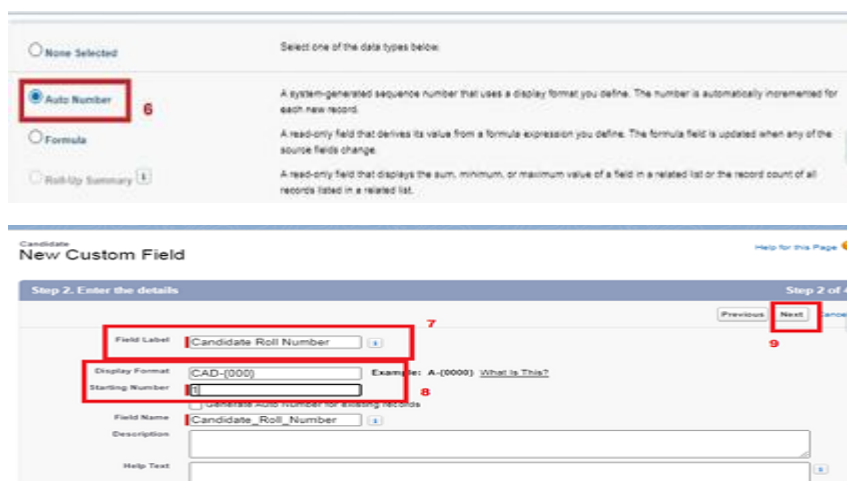
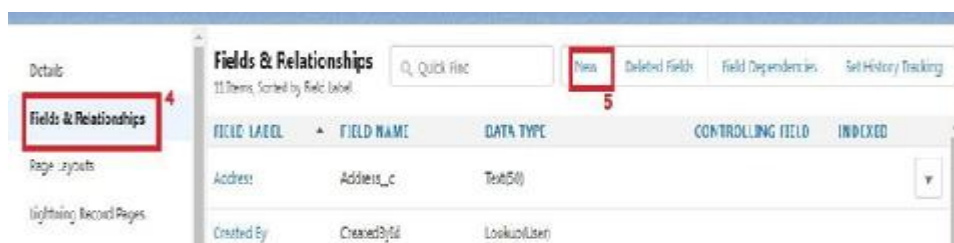
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__s

Insert

Close

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.



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.

The screenshot shows the Salesforce Setup interface. At the top, the 'Setup' tab is selected, and the 'Object Manager' tab is highlighted in the navigation bar. The 'Object Manager' page displays a table of objects. The 'Lecturer Details' object is selected, and the 'Fields & Relationships' section is active. The 'New' button is clicked, and the 'Number' field type is selected. The field creation wizard is shown with the following fields:

- Field Label:** Duration
- Length:** 1
- Decimal Places:** 2
- Field Name:** Duration
- Description:**
- Help Text:** Enter Course duration value in Years

Red boxes and numbers 1 through 7 highlight the steps in the process: 1. Gear icon, 2. Object Manager tab, 3. Lecturer Details object, 4. New button, 5. Number field type, 6. Field Label, and 7. Help Text.

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 Candidate Roll Number **7** **Field Name** Candidate_Roll_Number

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_p`

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

☐ DateTime Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next + NOW() + 1`

☐ Number Calculate a numeric value.
Example: `Fahrenheit * 1.8 * Celsius_c + 32`

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

☒ Text Create a text string, for example, by concatenating other text fields.
Example: `(Full Name *) & ' is a ' & First Name`

Example: Full Name * LastName & ", " & FirstName **More Examples...**

Simple Formula **Advanced Formula**

Insert Field **Insert Operator**

Candidate Roll Number (Text) =

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
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 > **Candidate >** **Address**

\$Api > Candidate > Candidate Name
\$Organization > Created By > Candidate Roll Number
\$Profile > Created By ID
\$System > Created Date
\$User > Internal results Name
\$UserRole > Last Modified By > City
Last Modified By ID
Last Modified By ID
Last Modified Date
Created By > Created Date
Created By ID
Created Date
Education
Email

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

Insert

Close

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.

Setup Home Object Manager

Object Manager

1 Zero, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		08/04/2023	✓

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Self History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(50)		
Created By	CreatedById	Lookup(User)		

None Selected

Select one of the data types below:

☒ Auto Number

☐ Formula

☐ Roll-Up Summary

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

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

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

Candidate

New Custom Field

Step 2. Enter the details

Previous Next

Field Label: Candidate Roll Number

Display Format: CAD-(000) Example: A-(0000) What Is This?

Starting Number: 1

Field Name: Candidate_Roll_Number

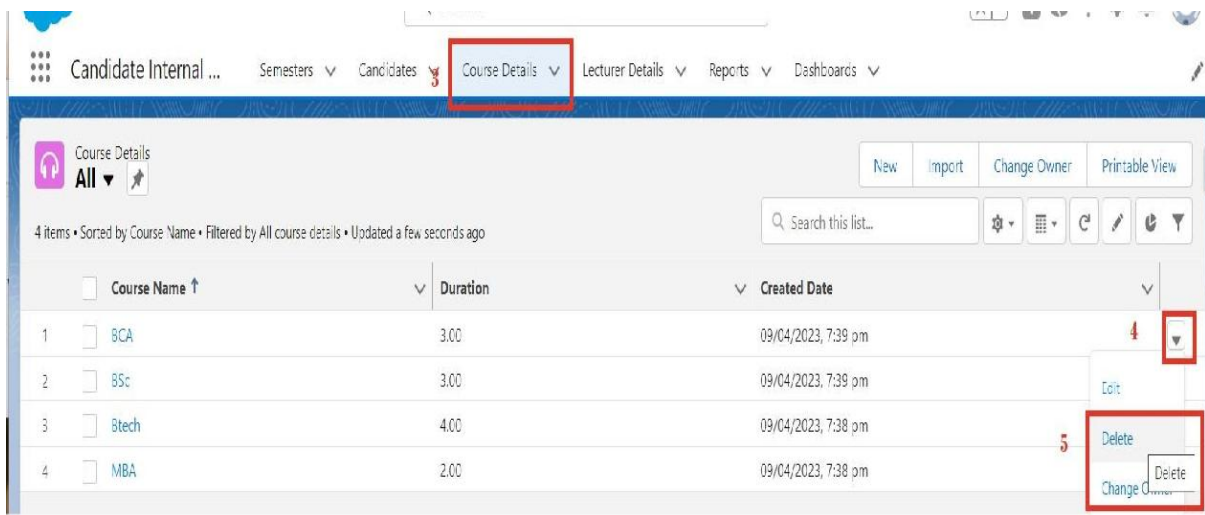
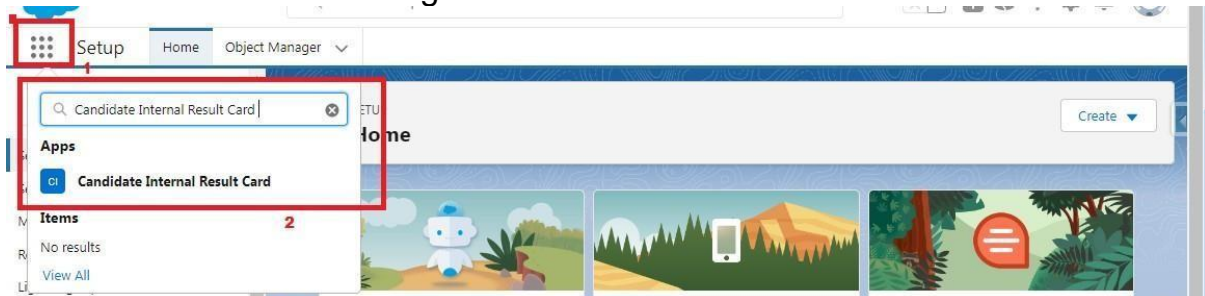
Description:

Help Text:

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.



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 displays the Salesforce interface for creating a report. At the top, the App Launcher is open, showing the 'Candidate Internal Result Card' app selected. Below this, the Report Builder is shown with the report titled 'Candidate Internal Result Report'. The report type is set to 'Semesters with Course'. The 'Groups' panel on the left is open, showing 'GROUP ROWS' with 'Course: Course Name' and 'GROUP COLUMNS' with 'Course: Duration'. The 'Refresh' button is highlighted with a red box and the number 7. The 'Save & Run' button is highlighted with a red box and the number 8. The main report area shows a table with columns 'Course: Course Name' and 'Semester: Semester Name', containing data for BCA (1), BSc (3), and Btech (2) across semesters 1st, 2nd, 3rd, 4th, and 5th.

Course: Course Name	Semester: Semester Name
BCA (1)	1st
Subtotal	
BSc (3)	2nd
	6th
	3rd
Subtotal	
Btech (2)	4th
	5th

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.

Edit Bucket Column

*Field: Course: Duration *Bucket Name: Duration

	Range	Bucket	
<input type="button" value="Add"/>	<= 1	Small Course	<input type="button" value="X"/>
<input type="button" value="Add"/>	> 1 to 2	Medium Course	<input type="button" value="X"/>
	> 2	Large Course	<input type="button" value="X"/>

☒ Treat empty Course: Duration values in the report as zeros.

Background Report Preview:

REPORT: Candidate Internal Result Report

Semesters with Course

Outline: GROUP ROWS, GROUP COLUMNS

Columns: Course: Owner Name, # Course: Duration

Report Data:

Small Course (2)	rakesh team leader	1.00
Subtotals		
Grand Total		

Row Counts: ☒ Detailed Rows: ☒ Subtotals: ☒ Grand Total: ☒ Conditional Formatting

Save Report

Report Name

Candidate Internal Result Report

Report Unique Name

Candidate_Internal_Result_Report_bkY

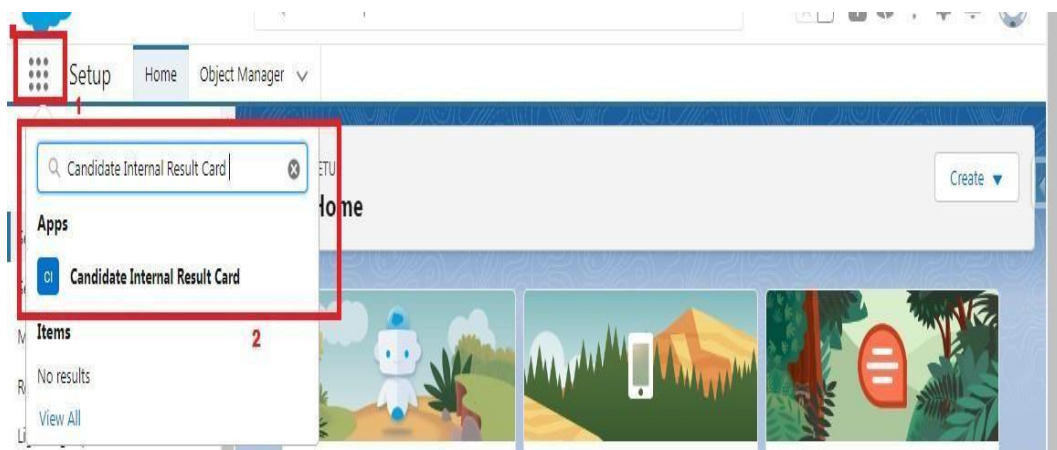
Report Description

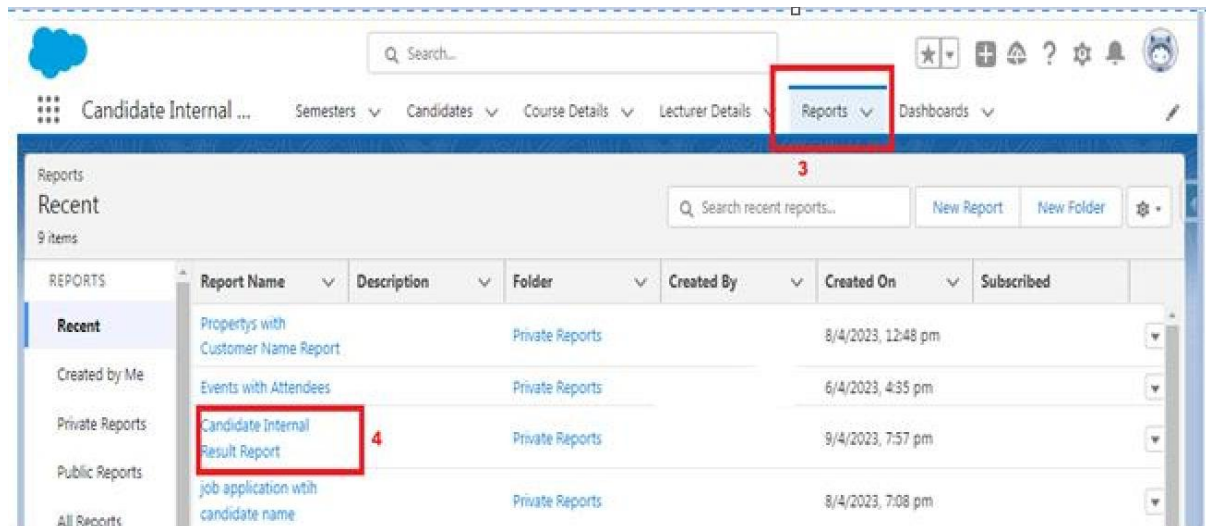
Cancel

Save

View Report

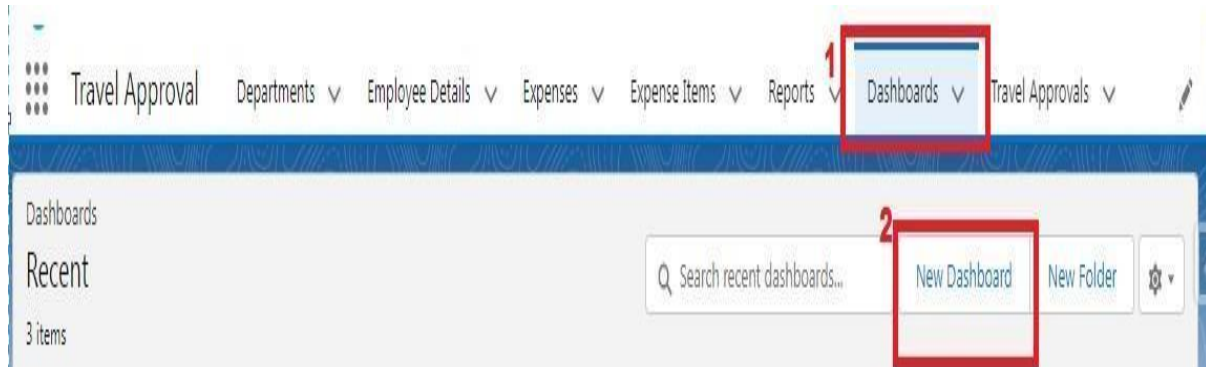
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.
3. Click on Reports Tab.
4. Click on Candidate Internal Result Report and see records.





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.-



New Dashboard

* Name

Candidate Internal Result Card |

Description

3

Folder

Private Dashboards

Select Folder

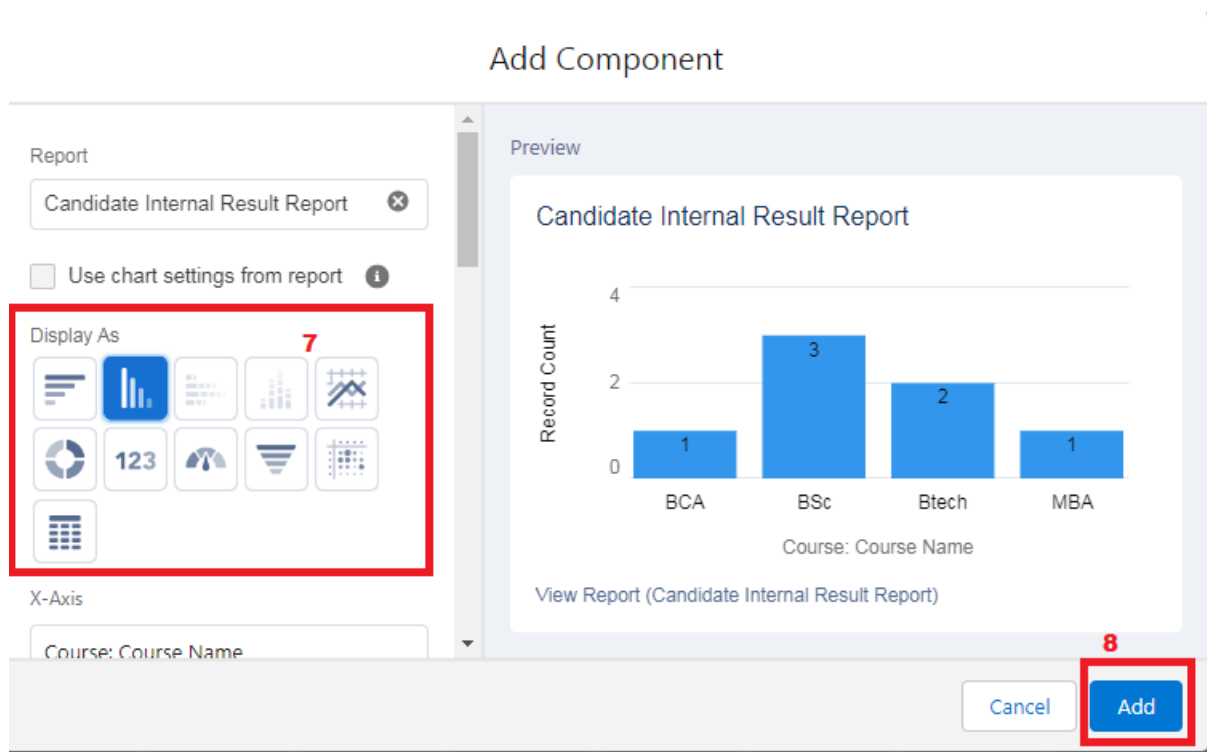
4

Cancel

Create

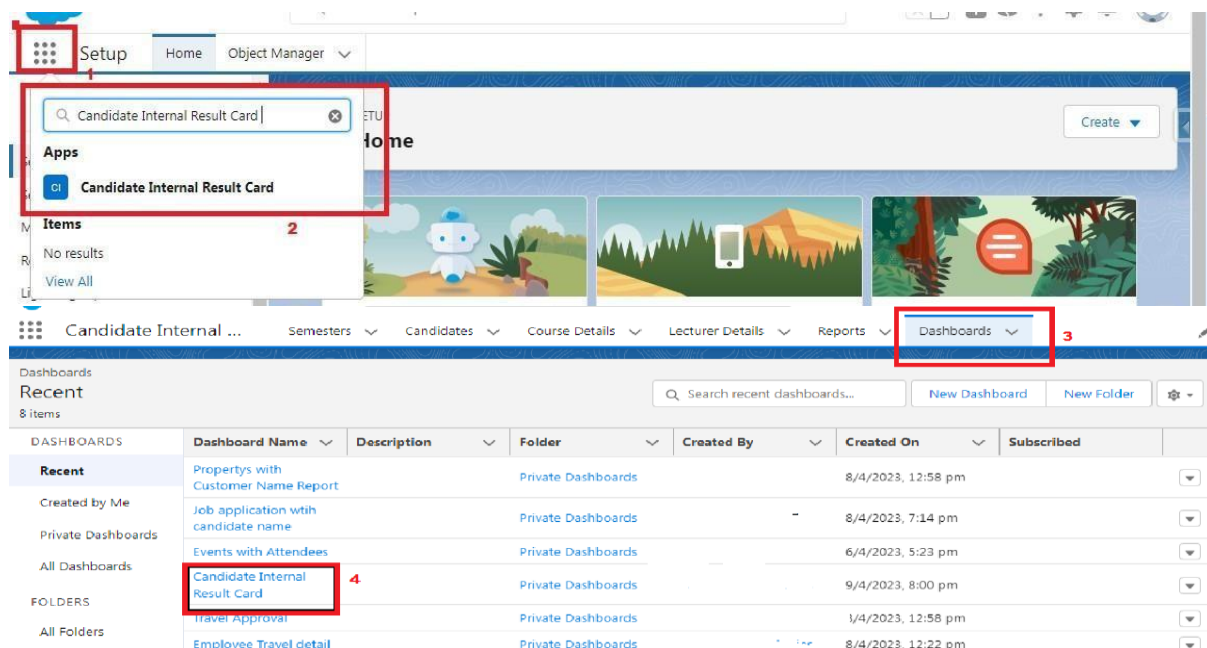
The screenshot shows the dashboard editor interface. At the top, there is a search bar and a navigation menu with items like 'Travel Approval', 'Departments', 'Employee Details', 'Expenses', 'Expense Items', 'Reports', 'Dashboards', and 'Travel Approvals'. Below the navigation menu, the dashboard title 'Employee Travel detail' is displayed. A red box highlights the '+ Component' button in the toolbar. The dashboard area below the toolbar is a grid of blue squares representing components.

5



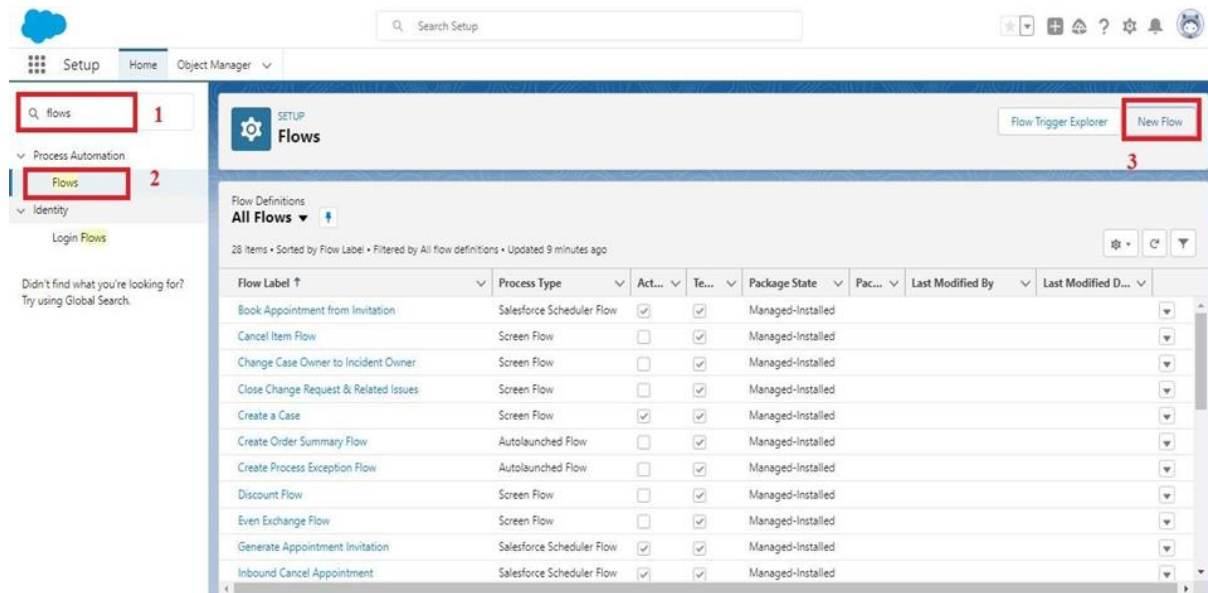
View Dashboard

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

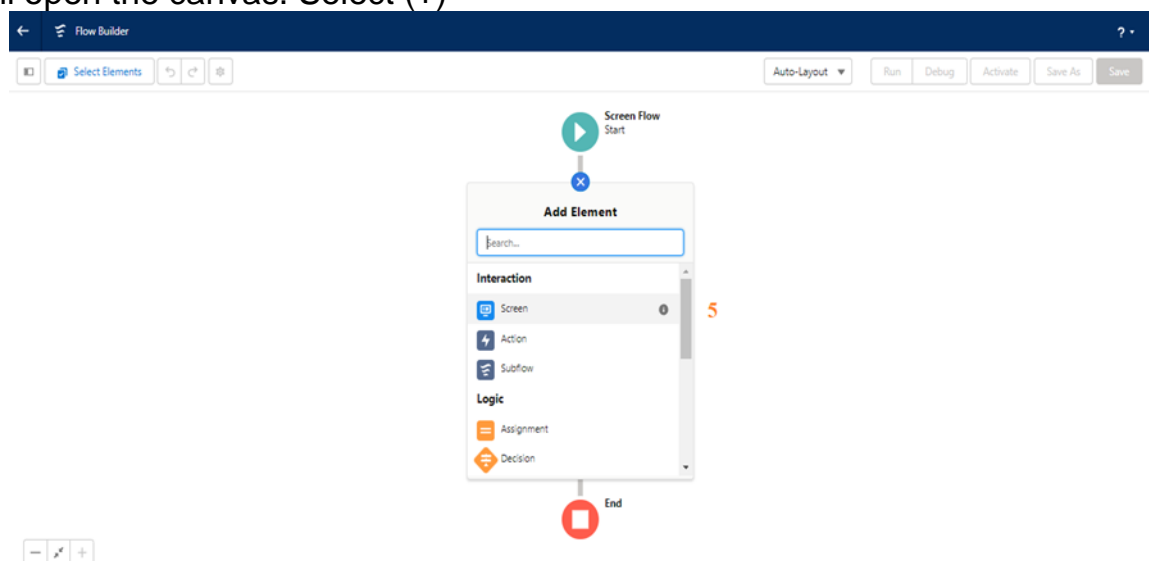


Create A Screen Flow

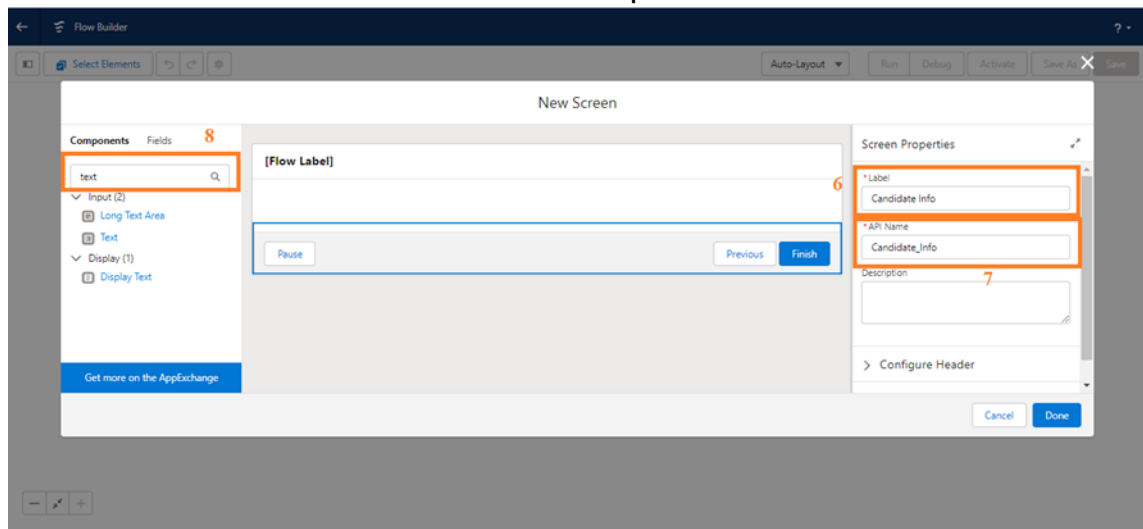
1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow



4. It will open the canvas. Select (+)



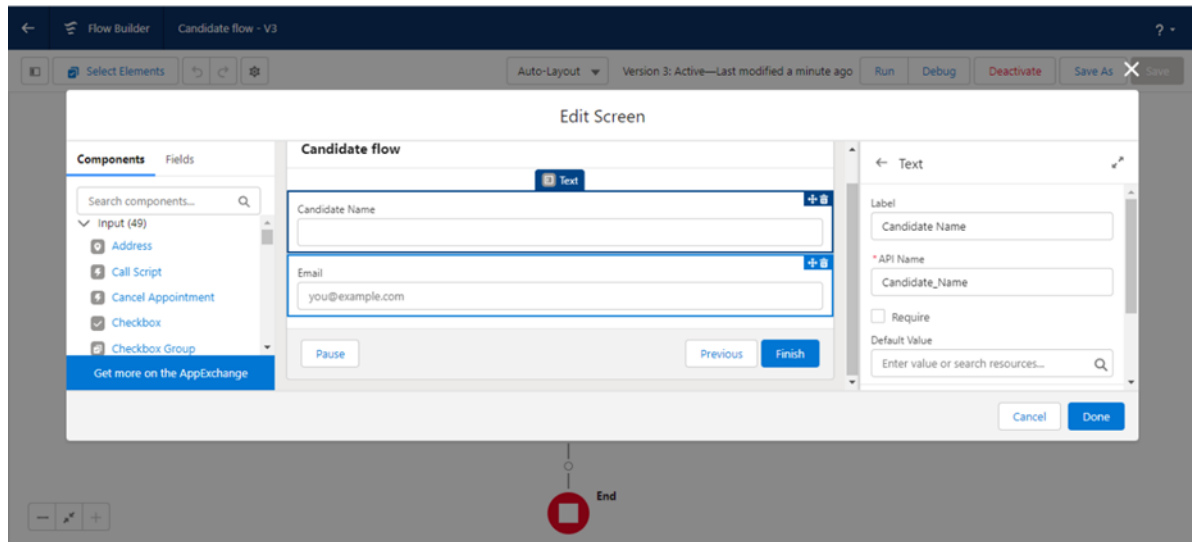
5. Select the screen element from the drop down.



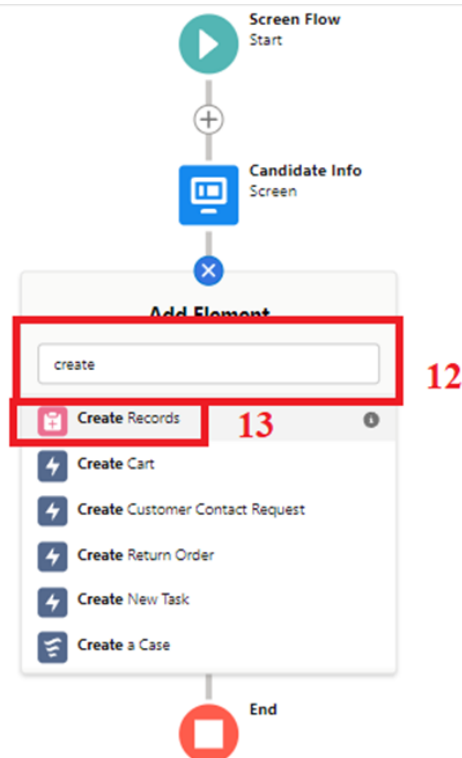
6.It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label: Candidate info

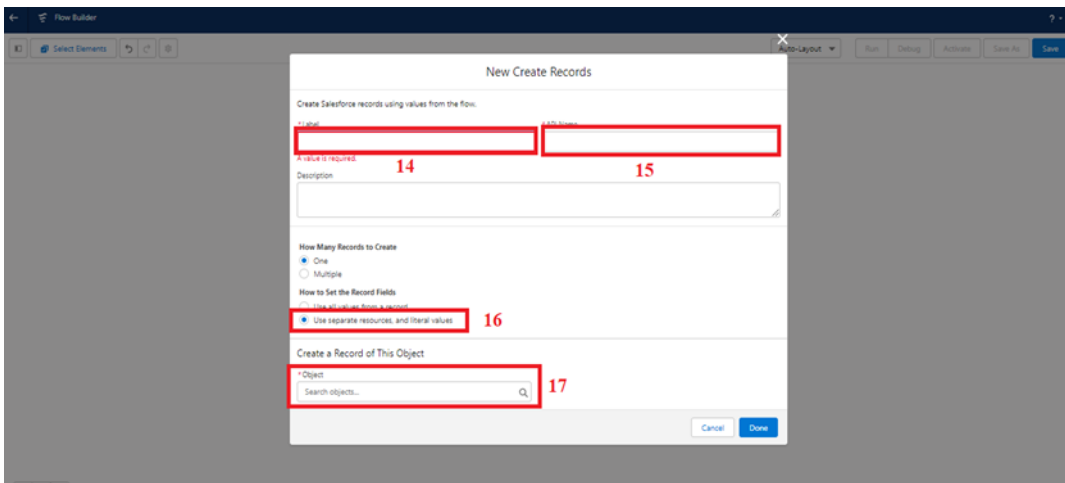
API Name: Candidate_Info (This field will be auto populated.)



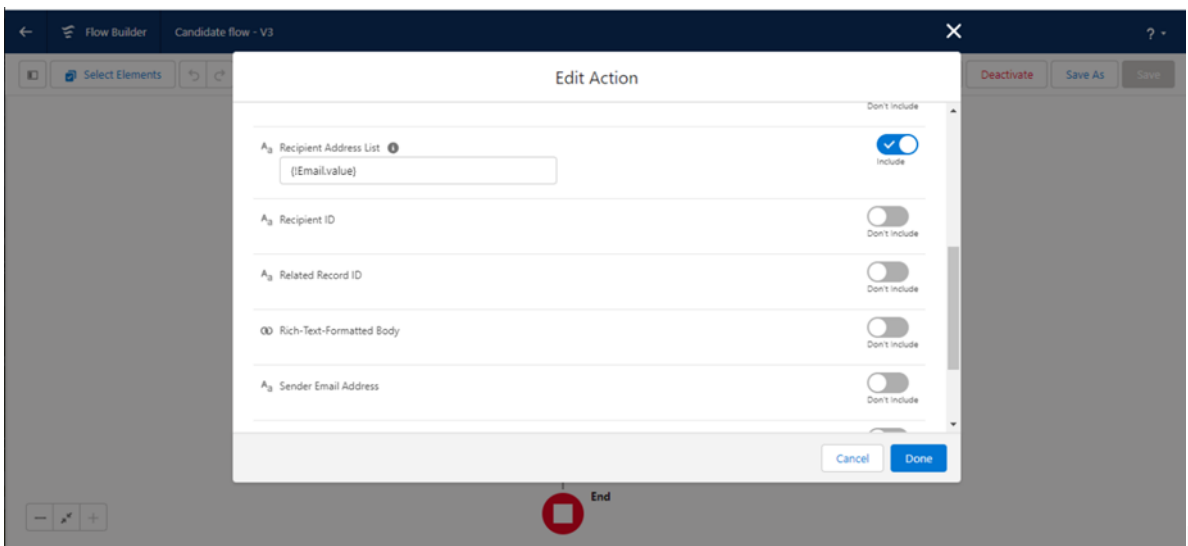
7..In search Component type text and drag the text component to canva and give the label and Api Name



8. Similarly, Add Email Component also.



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.

Create a new Lightning page

*Label

Back

Next

Create An App Page

1. Click on the Gear icon and select set up.
2. In Quick Find Box . Type app Builder and select the lightning app builder
3. Select New

The screenshot shows the Lightning App Builder interface. On the left, there is a sidebar with a 'Quick Find' box containing 'app builder' and 'lightning app builder'. The main area displays a table of 'Lightning Pages'. The 'New' button in the table is highlighted with a red box.

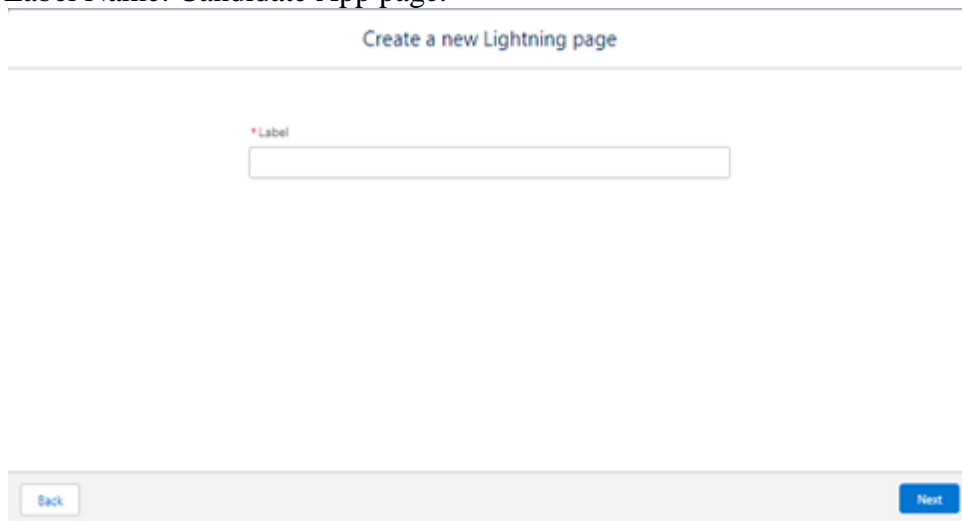
Label	Name	Description	Type	Created By	Created On	Last Modified By	Last Modified On
Home Page	Home_Page_Default	Home Page	Home Page	System	1/1/2016 12:00:00 AM	System	1/1/2016 12:00:00 AM
Profile Page	Profile_Page_Default	Profile Page	Profile Page	System	1/1/2016 12:00:00 AM	System	1/1/2016 12:00:00 AM
App Page	App_Page	App Page	App Page	System	1/1/2016 12:00:00 AM	System	1/1/2016 12:00:00 AM

4. Select the App page and click on Next

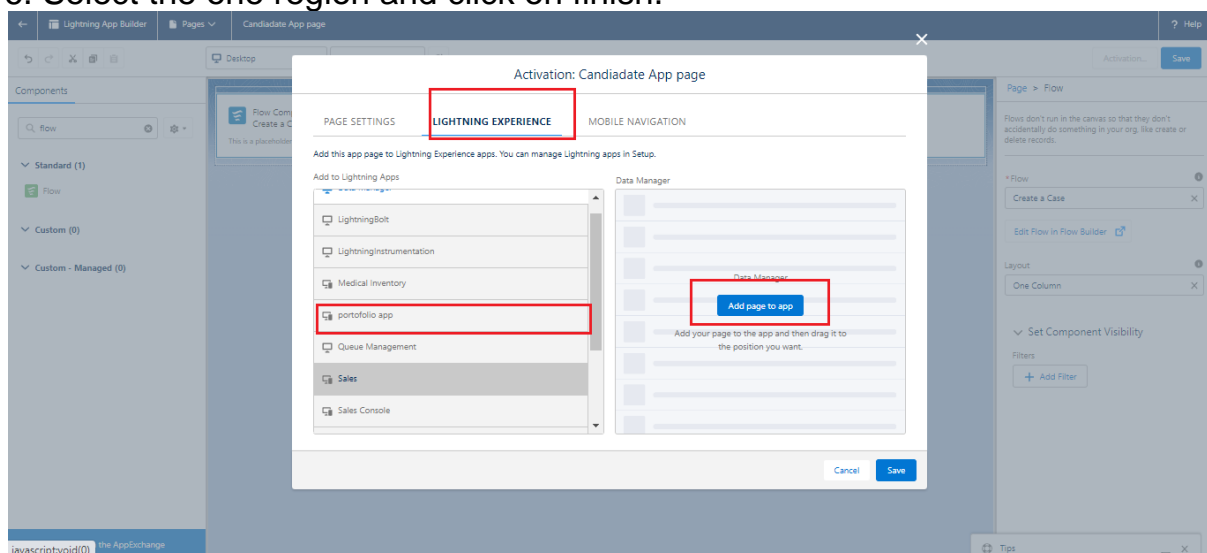
The screenshot shows the 'Create a new Lightning page' dialog box. On the left, there is a list of page types: 'App Page', 'Home Page', 'Record Page', 'Embedded Service Page', and 'Voice Extension'. The 'App Page' option is highlighted with a red box. On the right, there is a preview of the 'App Page' layout. At the bottom right, the 'Next' button is highlighted with a red box.

5. Give the label Name.

Label Name: Candidate App page.



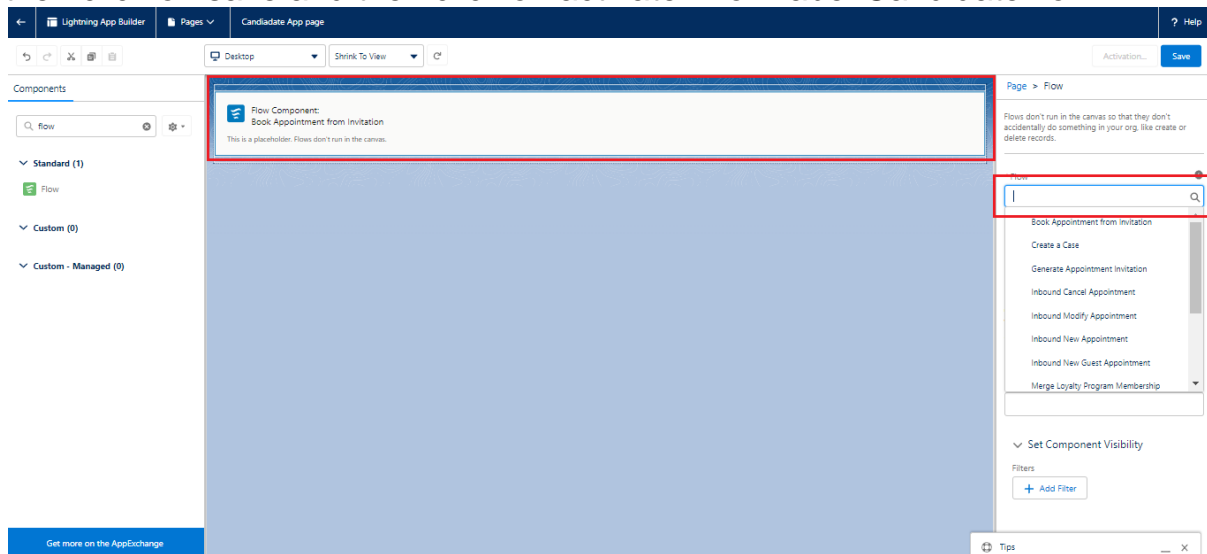
6. Select the one region and click on finish.



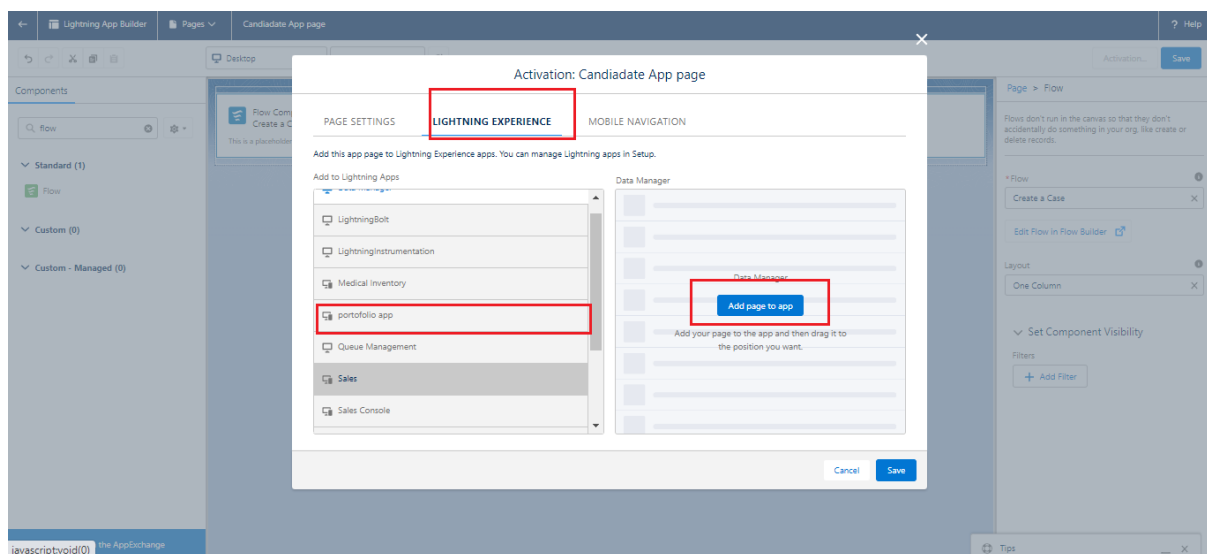
7. Type the flow in the search bar and select the flow component and drag the component to the Add components here.



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.



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 InternalmarksHandler
4. Now Write the below code

```

1 public class InternalmarksHandler {
2     public static void beforeinsert(list<Internal_result__c> newlist){
3
4         for(Internal_result__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 }

```

```

public class InternalmarksHandler {
    public static void beforeinsert(list<Internal_result__c> newlist){

        for(Internal_result__c internalmarks : newlist){
            if(internalmarks.marks__c >= 200){
                internalmarks.status__c = 'Pass';
            }else{
                internalmarks.status__c='fail';
            }
        }

    }
}

```

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

```

1 trigger Internalmarks on Internal_result__c (before insert) {
2     If(trigger.isInsert)
3     {
4         If(trigger.isBefore)
5         {
6             InternalmarksHandler.beforeinsert(trigger.new);
7         }
8     }
9
10 }

```

```

trigger Internalmarks on Internal_result__c(before insert,after update) {
    If(trigger.isInsert)
    {
        If(trigger.isBefore)

```

```

    {
        InternalmarksHandler.beforeinsert(TTrigger.new);
    }
}

```

8.Trigger Working as follows:

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

The screenshot shows a Salesforce 'Internal result' form. The 'Internal result Name' is 'Test Trigger'. The 'Candidate' field is empty. The 'Course' field is empty. The 'Marks' field is set to 300. The 'Status' field is set to 'Pass'. A red box highlights the 'Marks' field, and a red box highlights the 'Status' field. A red arrow points from the 'Marks' field to the 'Status' field.

The screenshot shows the 'Internal result' details page for 'Test Trigger'. The 'Internal result Name' is 'Test Trigger'. The 'Owner' is 'rakesh team leader'. The 'Candidate' field is empty. The 'Course' field is empty. The 'Marks' field is set to 300. The 'Candidate Roll Number' field is empty. The 'Status' field is set to 'Pass'. A red box highlights the 'Status' field.

