

PROJECT REPORT ON
Implementing CRM for Result Tracking of a Candidate with Internal Marks
(ADMIN) - (Short-term)

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

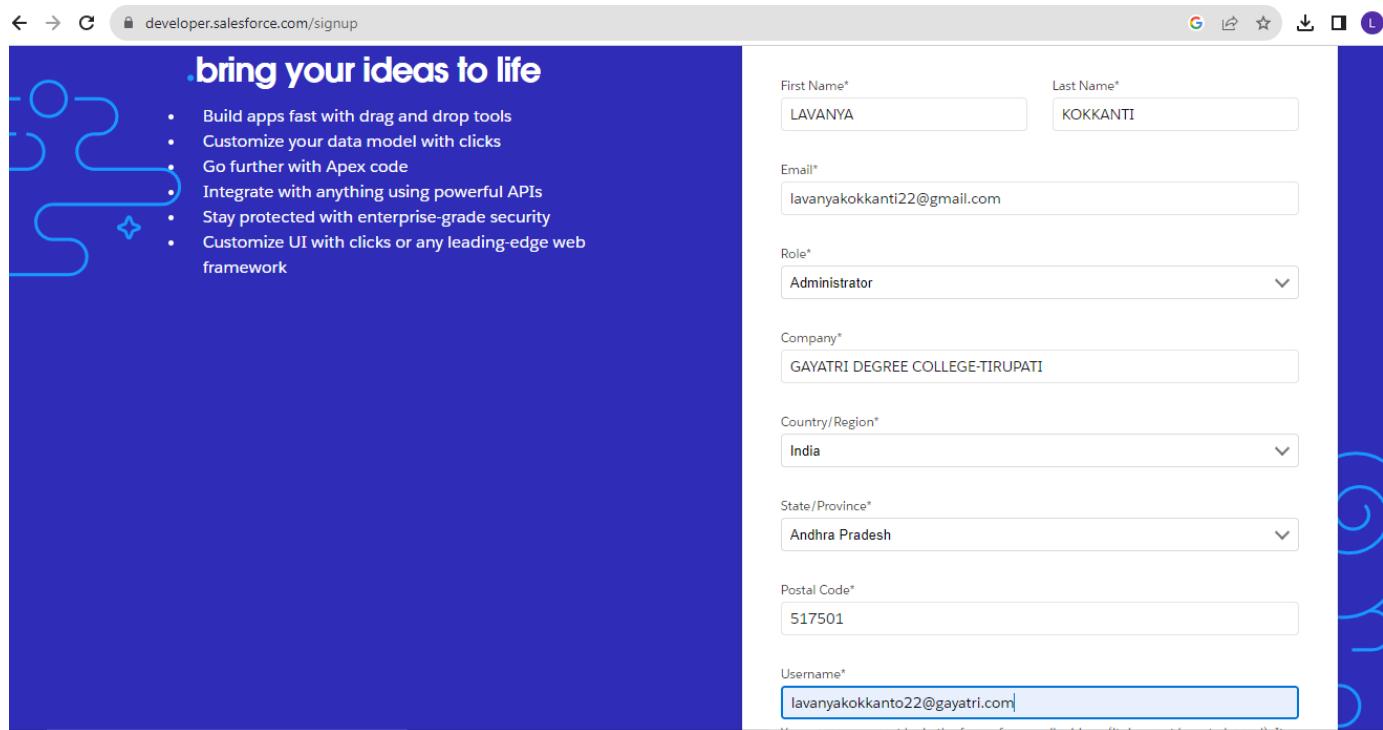
Milestone 01: Create Salesforce Org

Go to [developers.salesforce.com/Signup](https://developer.salesforce.com/signup)

Click on sign up.

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

1. First name & Last name :LAVANYA KOKKANTI
2. Email –lavanyakokkanti22@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: lavanyakokkanto22@gayatri.com



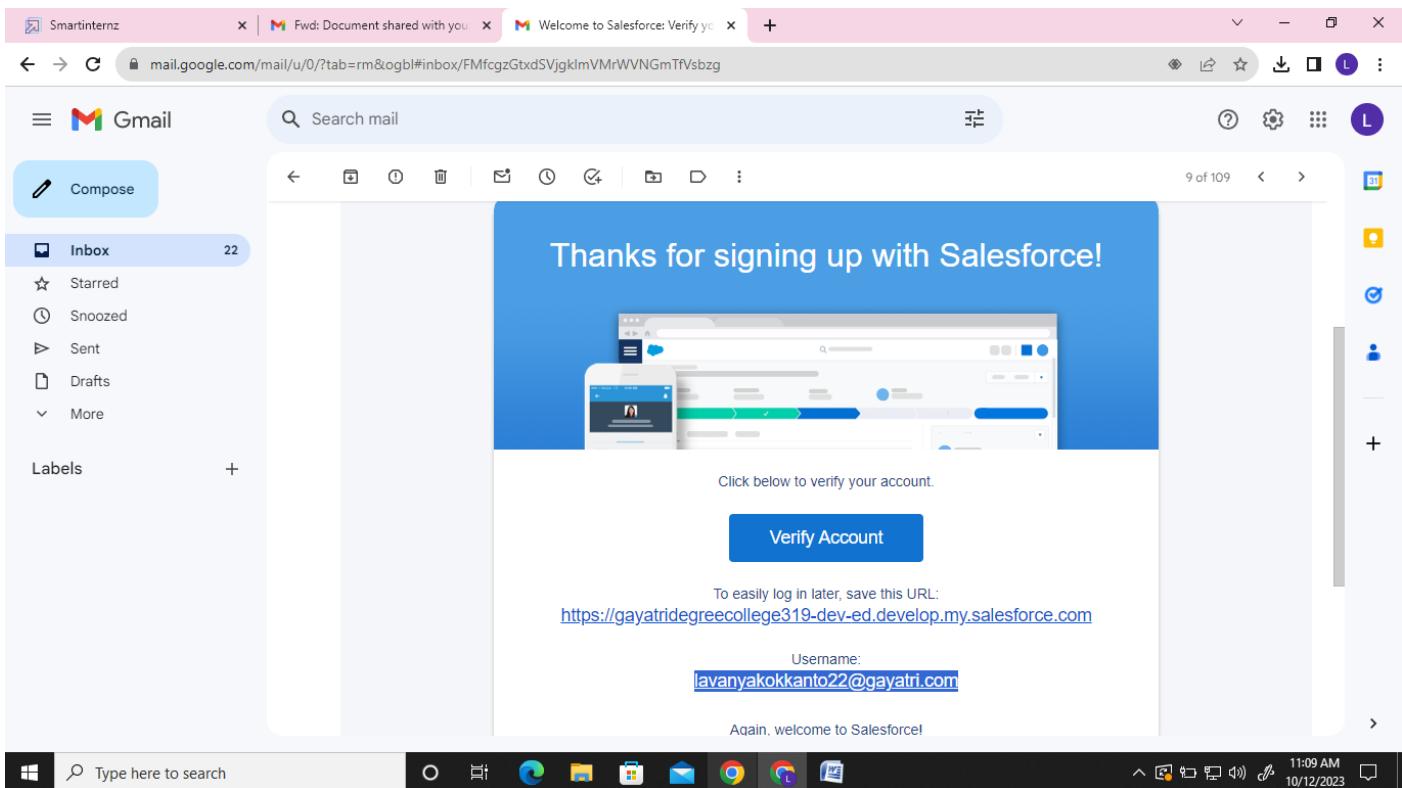
The screenshot shows a web browser displaying the Salesforce developer sign-up page at developer.salesforce.com/signup. The page has a blue header with the text "bring your ideas to life". On the left, there's a sidebar with a blue background featuring abstract white line art. The main form area contains the following fields:

First Name*	LAVANYA	Last Name*	KOKKANTI
Email*	lavanyakokkanti22@gmail.com		
Role*	Administrator		
Company*	GAYATRI DEGREE COLLEGE-TIRUPATI		
Country/Region*	India		
State/Province*	Andhra Pradesh		
Postal Code*	517501		
Username*	lavanyakokkanto22@gayatri.com		

The "Username" field is highlighted with a blue border, indicating it is the current field being focused on.

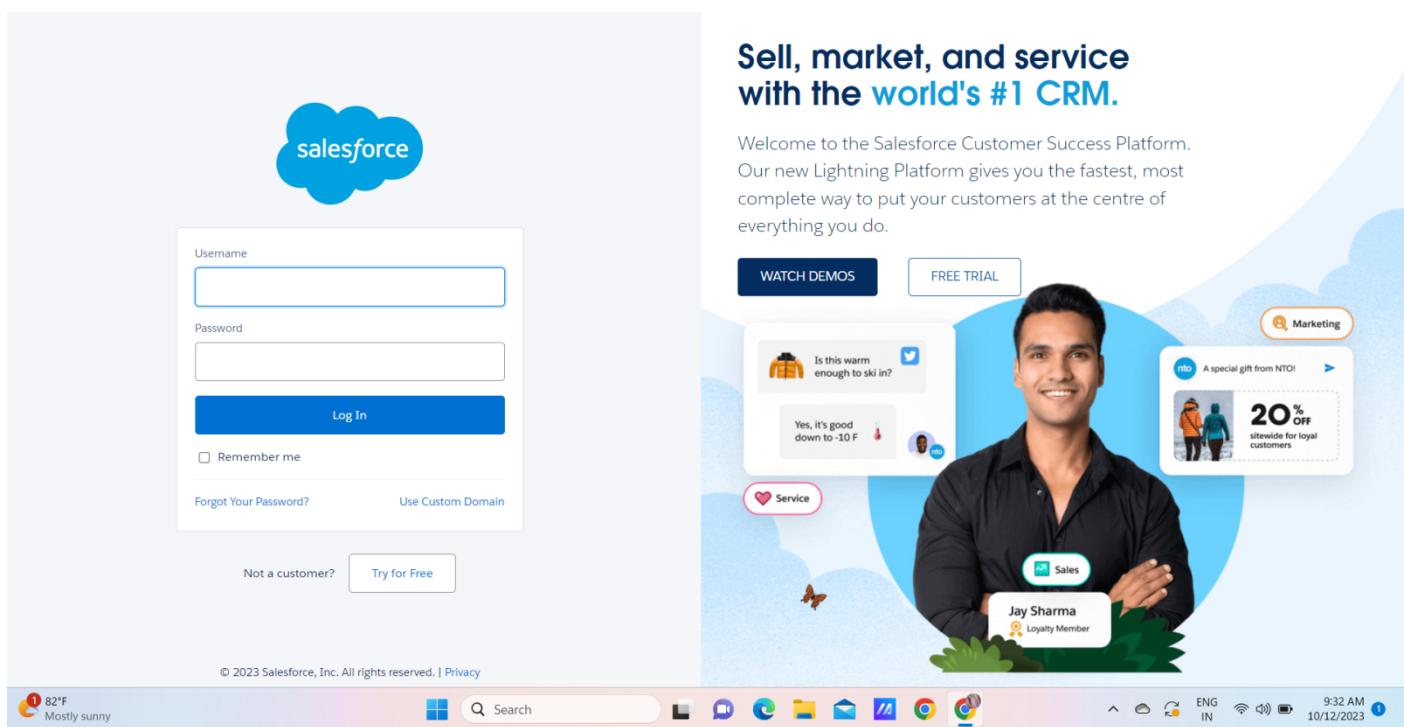
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login to Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Milestone – 02: Creation of Objects

Object – Semester

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area is titled 'SETUP > OBJECT MANAGER' and shows a list of objects. The first object listed is 'Semester'. The details for 'Semester' are displayed in a table format. The 'Details' section on the left lists various settings like Fields & Relationships, Page Layouts, and Record Types. The 'Details' section on the right shows specific configuration for 'Semester':

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

At the bottom of the screen, there is a taskbar with icons for weather (82°F Mostly sunny), search, and various applications (File Explorer, Mail, Task List, etc.). The system status bar at the bottom right shows 'ENG IN' and the date '10/12/2023'.

Object – Candidate

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

8. Check the Allow Reports

9. Check the Allow Search

10. Click Save

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main area displays the 'Candidate' object details. On the left, a sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Details' tab is currently active. The main content area shows the following fields:

Field	Value
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

At the bottom right of the main area are 'Edit' and 'Delete' buttons.

Object – Course Details

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

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Page Title:** Course Details
- Left Sidebar (Details tab):**
 - Fields & Relationships
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
 - Search Layouts
 - List View Button Layout
 - Restriction Rules
 - Scoping Rules
- Right Panel (Details tab):**
 - Description
 - API Name: Course_Details_c
 - Custom
 - Singular Label: Course Details
 - Plural Label: Course Detailss
 - Enable Reports (checked)
 - Track Activities
 - Track Field History
 - Deployment Status: Deployed
 - Help Settings: Standard salesforce.com Help Window
- Bottom:** Edit, Delete, 82°F, ENG, 9:37 AM

Object – Lecturer Details

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

The screenshot shows the Salesforce Setup interface with the URL gayatridgegreecollege-tiru92-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000003CNUr/Details/view. The page title is "SETUP > OBJECT MANAGER" and the sub-page title is "Lecturer Details". The left sidebar lists various object configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Details" and contains the following fields:

Description	Enable Reports <input checked="" type="checkbox"/>
API Name Lecturer_Details__c	Track Activities
Custom	Track Field History
✓	Deployment Status Deployed
Singular Label Lecturer Details	Help Settings Standard salesforce.com Help Window
Plural Label Lecturer Detailss	

At the top right of the main content area are "Edit" and "Delete" buttons.

1. Object – Internal results

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

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with icons for back, forward, search, and various system settings. Below it, the main header reads "SETUP > OBJECT MANAGER Internal results". On the left, a sidebar titled "Details" lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Details" and contains fields for "Description", "API Name" (set to "Internal_results__c"), "Custom" (checked), "Singular Label" (set to "Internal results"), "Plural Label" (set to "Internal resultss"), "Enable Reports" (checked), "Track Activities", "Track Field History", "Deployment Status" (set to "Deployed"), "Help Settings" (set to "Standard salesforce.com Help Window"), and a "Search" bar at the bottom.

Milestone – 03: Tabs

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

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

Creation of semester candidate internal result card

Now create a custom tab. Click the Home tab.

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

Action	Label	Tab Style	Description
Edit Del	Candidates	Bridge	
Edit Del	Course Details	Chip	
Edit Del	Internal results	Big top	
Edit Del	Lecturer Details	Circle	
Edit Del	Semesters	Globe	

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.

Help for this Page

Custom Object Tabs

New What Is This?

Action Label Tab Style Description

Edit | Del Candidates Bridge

Edit | Del Course Details Chip

Edit | Del Internal results Big top

Edit | Del Lecturer Details Circle

Edit | Del Semesters Globe

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Tomorrow's low Near record

Search

ENG IN 9:40 AM 10/12/2023

Milestone – 04: Lightning app

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs. There are two types of app –

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

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

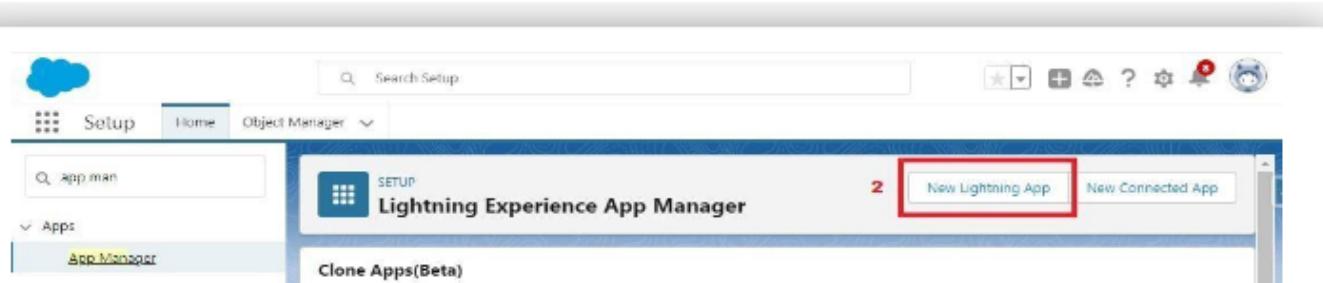
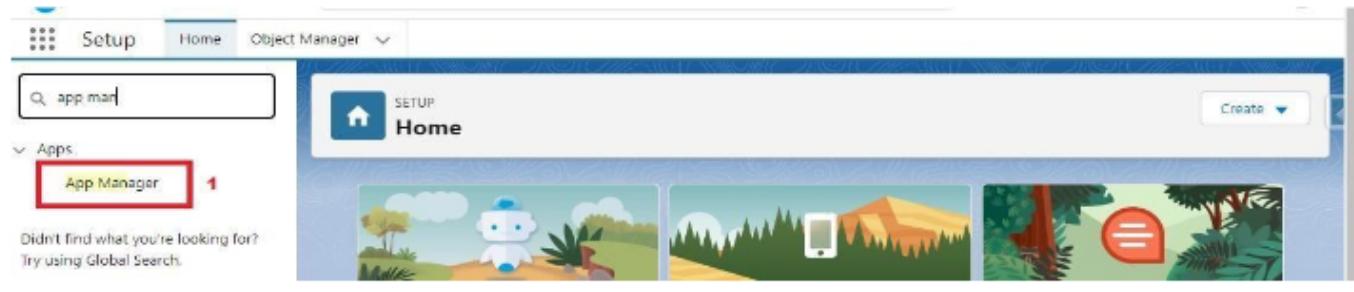
2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

Note: Logos for Custom Apps can be changed.

Create The Candidate Internal Result Card App

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

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



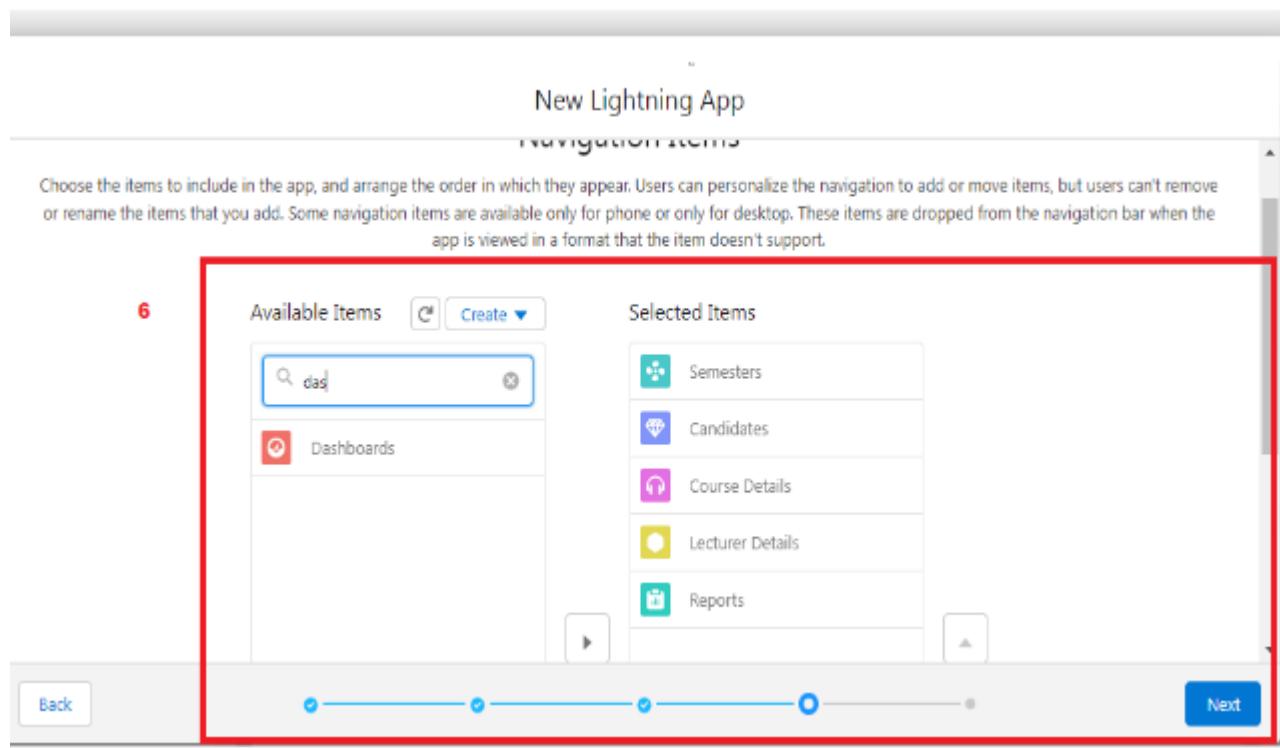
This screenshot shows the "App Details & Branding" configuration page. It's divided into two main sections: "App Details" and "App Branding".

App Details: This section contains three fields:

- "*App Name" (required) with the value "Candidate Internal Result Card". This field is highlighted with a red box and has a red number "3" above it.
- "*Developer Name" (required) with the value "Candidate_Internal_Result_Card".
- "Description" (optional) with a placeholder text area.

App Branding: This section contains three fields:

- "Image" (optional) with a file upload button labeled "Upload".
- "Primary Color Hex" (optional) with a color picker and the hex value "#0070D2".
- A progress bar at the bottom with six steps, where the first step is blue and the others are grey. To the right of the progress bar is a large blue "Next" button, which is also highlighted with a red box.



Milestone – 05: fields and relationship

Fields And Relationship

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

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

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

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Lecturer Details
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click next.
7. For Field Label, enter Lecturer Role
8. Enter Length 40
9. Click Next, Next, then Save & New

The screenshot shows the Salesforce Setup interface. A red box labeled '1' highlights the gear icon in the top right corner. Another red box labeled '2' highlights the 'Object Manager' tab in the top navigation bar. A third red box labeled '3' highlights the 'Lecturer_Details__c' entry in the list of objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		06/04/2023	✓

The screenshot shows the Salesforce Setup interface with the 'Fields & Relationships' tab selected in the sidebar, indicated by a red box labeled '4'. A red box labeled '5' highlights the 'New' button at the top of the list table. The table lists fields for the 'Lecturer_Details__c' object.

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



Step 2. Enter the details

Step 2 of 4

Previous **Next** Cancel

Field Label	Lecturer Role 7
Length	40 8
Field Name	Lecturer_Role 9
Description	<input type="text"/>
Help Text	<input type="text"/>

Smartinternz | [Inbox \(22\) - lavanyakokkanti22@gmail.com](#) | [Lecturer Details | Salesforce](#) | +

Search Setup

Setup Home Object Manager

Lecturer Details

Details

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		
Help Text	Data Owner		
Field Usage	Field Usage		

Lecturer Details Custom Field: Lecturer Role ~ Salesforce - Developer Edition

Compliance Categorization

Created By LAVANYA KOKKANTI, 09/10/2023, 10:58 am Modified By LAVANYA KOKKANTI, 09/10/2023, 10:58 am

General Options

Required Unique Case Sensitive

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.

1

2

3

Object Manager

Lecturer Details Lecturer_Details__c

4

5

Fields & Relationships

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

6

Lookup Relationship

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

Master-Detail Relationship

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

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

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

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Semester 7

Previous Next Cancel

Field Label: Semester Name 8

Field Name: Semester_Name 8

Description:

Help Text:

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A specific field, 'Semester Name', is being edited for the 'Semester' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main panel displays the 'Field Information' section for 'Semester Name'. It shows the field label as 'Semester Name', data type as 'Text(80)', and a note that it is a 'Back to Semester' relationship. Other settings include Field Name (Name), Data Sensitivity Level (Compliance Categorization), and Validation Rules (No validation rules defined). A 'Set Field-Level Security' and 'View Field Accessibility' button are also present.

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 image consists of three vertically stacked screenshots of the Salesforce Object Manager interface.

Screenshot 1: Shows the main Salesforce header with the gear icon highlighted by a red box. Below it, the 'Object Manager' tab is selected, indicated by a red box labeled '2'. The search bar contains 'lect'.

Screenshot 2: Shows the 'Object Manager' page for the 'Lecturer Details' custom object. A red box labeled '3' highlights the 'API NAME' column, which shows 'Lecturer_Details__c'. The table includes columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

Screenshot 3: Shows the 'Fields & Relationships' section for the 'Lecturer Details' object. A red box labeled '4' highlights the 'Fields & Relationships' tab. A red box labeled '5' highlights the 'New' button. The table lists fields: 'Address' (Field Label) and 'Address_c' (Field Name). Another row shows 'Created By' and 'CreatedById'.

Screenshot 4: Shows the configuration screen for a new number field named 'Duration'. A red box labeled '6' highlights the 'Field Label' input field containing 'Duration'. Below it, a note says: 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "112345678.90".' The 'Length' input is '1' and 'Decimal Places' is '2'. A red box labeled '7' highlights the 'Help Text' input field containing 'Enter Course duration value in Years'.

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.

1

2

3

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

4

5

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

6

<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input checked="" type="radio"/> Formula	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

Auto add to custom report type Add this field to existing custom report types that contain this entity 8

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `ISODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

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

Date/Time 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 Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

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

[Simple Formula](#) [Advanced Formula](#) [Operators & Functions](#)

Insert Field 9 **Insert Operator** 9

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 10 City Created By > Created By ID Created Date Education Email	<p>You have selected: Candidate__r.Candidate_Roll_Number__c Type: Auto Number API Name: Candidate__r.Candidate_Roll_Number__c</p> <p>Insert</p>
--	---	--	--

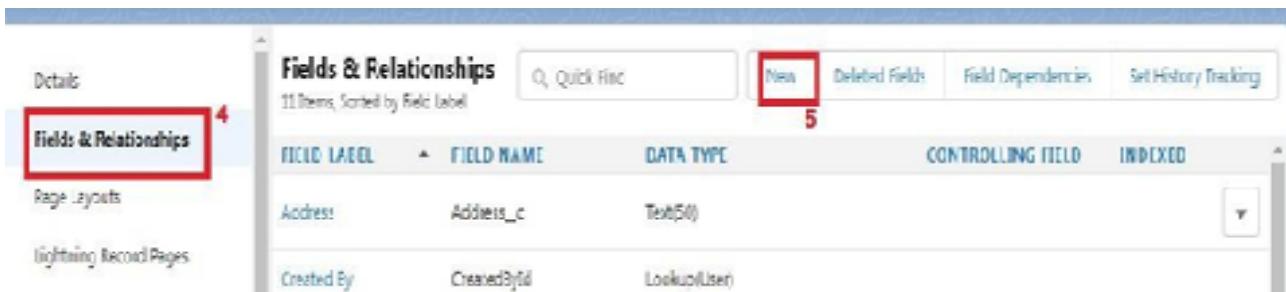
Close

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Smartinternz, Inbox (22), Google Doc, Candidate | Salesforce, and a search bar. Below the navigation is a header with a cloud icon, a search bar, and various setup tools. The main content area is titled "Candidate Custom Field Candidate Roll Number". On the left, a sidebar lists navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The right side displays the "Custom Field Definition Detail" for the "Candidate Roll Number" field, showing details such as Field Label (Candidate Roll Number), Field Name (Candidate_enter_Roll_Number), API Name (Candidate_enter_Roll_Number__c), Data Type (Auto Number), and Created By (LAVANYA KOKKANTI) on 09/10/2023 at 12:17 pm. The status bar at the bottom shows the date and time (10/12/2023, 2:15 PM).

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.

The screenshot shows the Salesforce Object Manager interface. A red box labeled "1" highlights the "Object Manager" tab in the top navigation bar. A red box labeled "2" highlights the search bar containing "lect". A red box labeled "3" highlights the "API NAME" column for the newly created "Lecturer_Details__c" object, which is listed as a "Custom Object".



Fields & Relationships						
11 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	
Address		Address_c	Text(50)			
Created By		CreatedById	Lookup(User)			



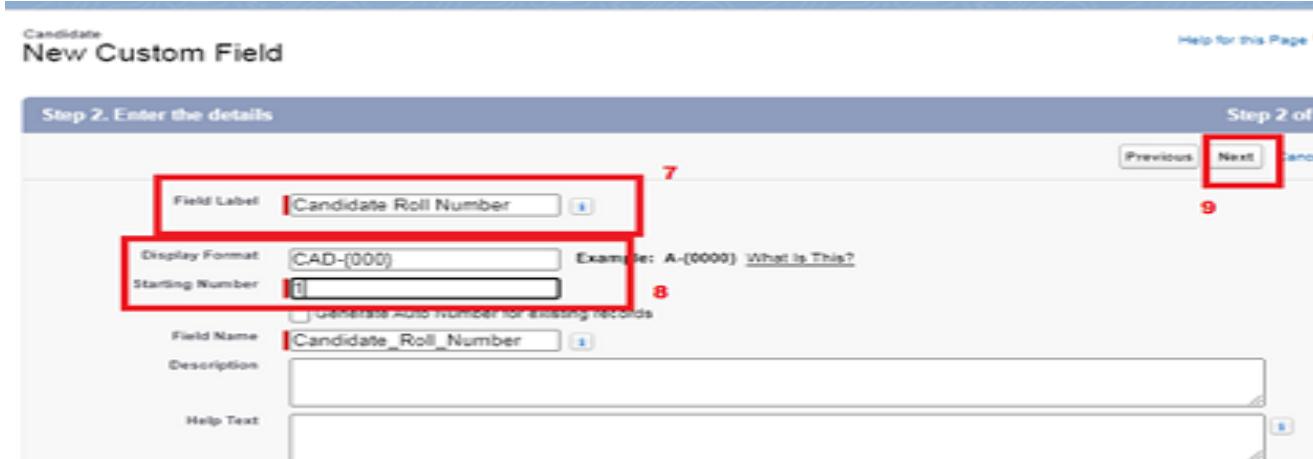
Select one of the data types below:

None Selected

Auto Number 6 A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula 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.

Roll-Up Summary 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 Help for this Page

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	Candidate Roll Number 7
Display Format	CAD-(000) 8
Starting Number	1 9
Field Name	<input type="checkbox"/> Generate Auto Number for existing records Candidate_Roll_Number
Description	
Help Text	

Milestone – 06: users

Creating A User

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

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

6. Select a profile as Standard user.

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

The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the sidebar (marked with red box 1). In the main content area, the 'User Management Settings' section is highlighted (marked with red box 2). The 'Users' tab is selected within this section. The 'All Users' table lists several users with their details and roles (marked with red box 3). The table includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are: 1_User (operator), 2_User (operator), Chatter Expert (Chatter Free User), Technologies_Vanshiv (System Administrator), and Teddy_John (Vehicle Manager).

The screenshot shows the 'User Edit' page for a new user. The 'General Information' section is highlighted with a red box (marked with red box 4). It contains fields for First Name (Class), Last Name (Teacher), Alias (cteach), Email (++++@++++.com), Username (++++@++++.com), Nickname (class), Title, Company, and Department. To the right, the 'Role' dropdown is set to <None Specified> (marked with red box 5). The 'User License' dropdown is set to Salesforce (marked with red box 6). The 'Profile' dropdown is set to Standard User, and the 'Active' checkbox is checked. Other user status checkboxes like Marketing User, Offline User, Knowledge User, Flow User, and Service Cloud User are also present.

Milestone – 07: user adoption

User Adoption

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

Create Record (Course Details)

Create Records on Course Details Objects

1. Click on App Launcher on left side of screen.

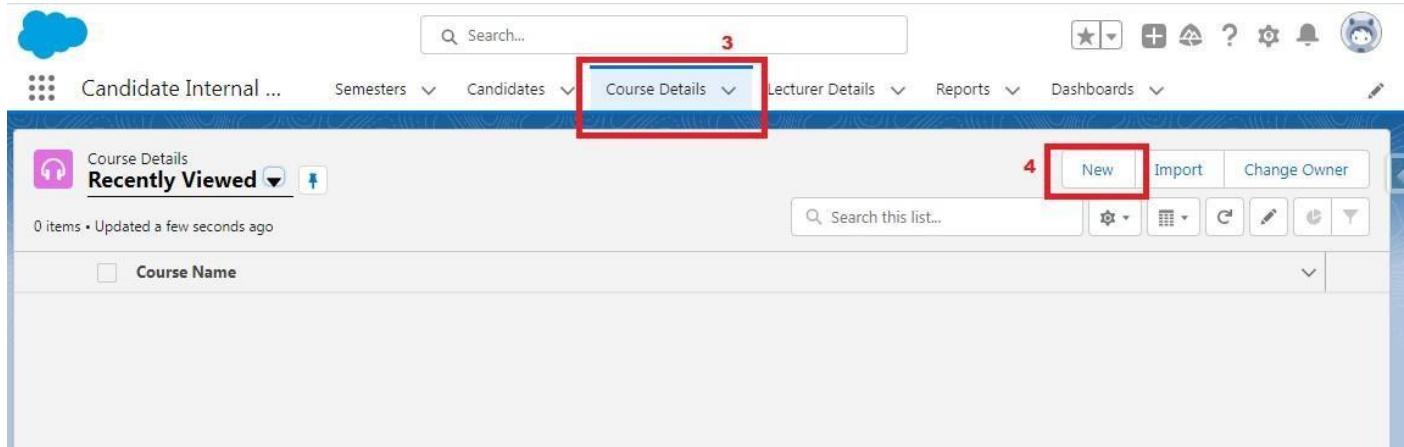
2. Search Candidate Internal Result Card App & click on it.

3. Click on Course Details tab.

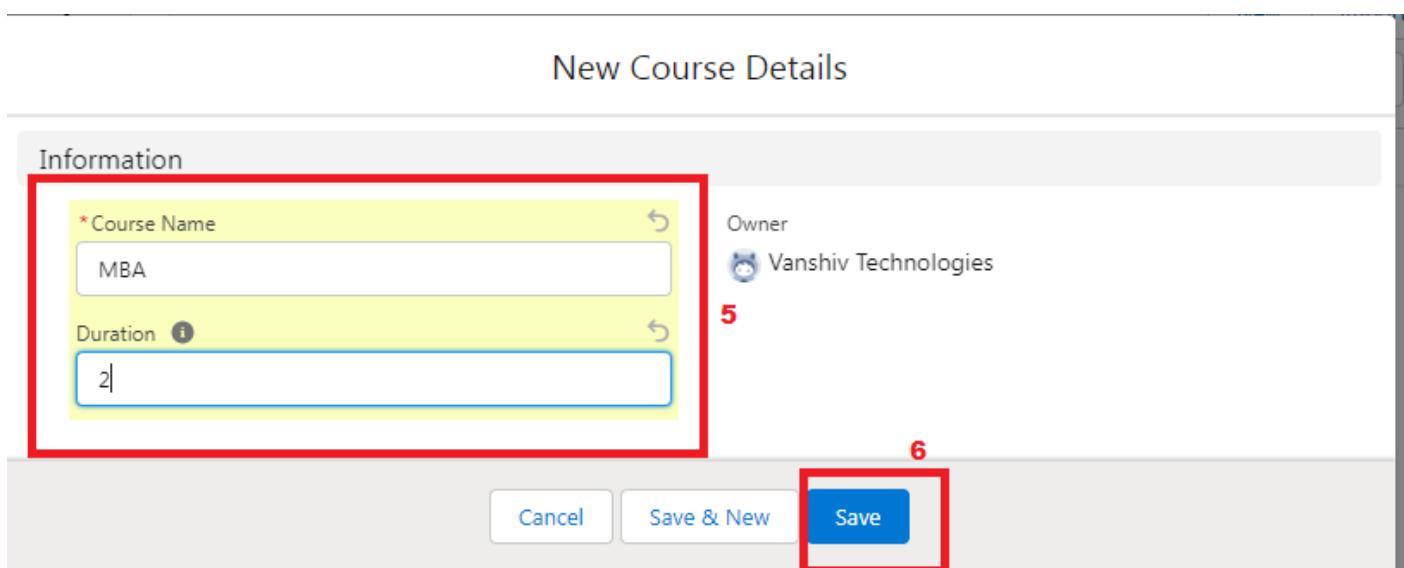
4. Click new button

5. Fill all Course Details record details.

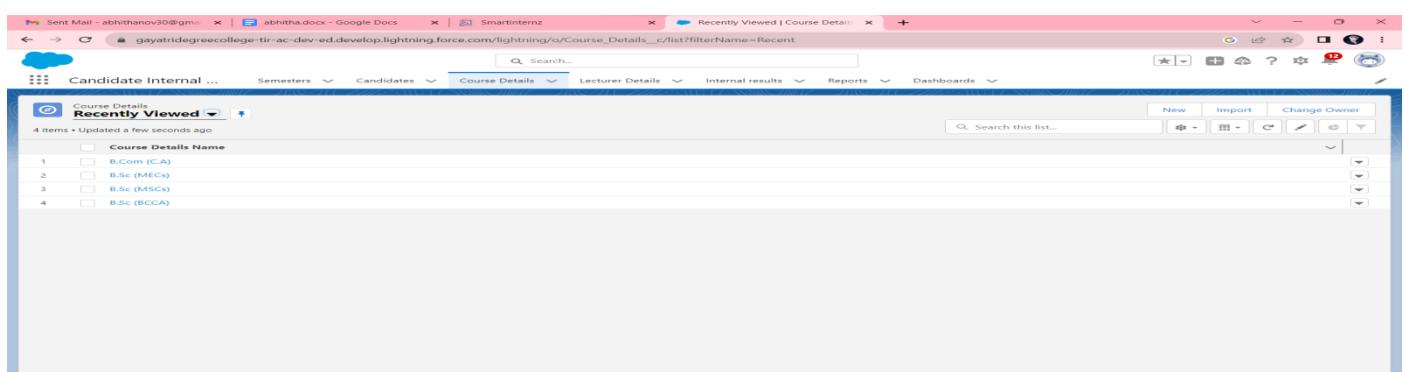
6. Click on Save Button.



The screenshot shows the Salesforce interface for the Candidate Internal Result Card App. The top navigation bar includes tabs for Semesters, Candidates, Course Details (which is highlighted with a red box), Lecturer Details, Reports, and Dashboards. Below the navigation is a search bar and a toolbar with various icons. The main area displays a list titled 'Course Details Recently Viewed' with a note that there are 0 items updated a few seconds ago. A red box highlights the 'New' button in the top right of the list view.



The screenshot shows a 'New Course Details' form. The 'Information' section contains fields for 'Course Name' (MBA) and 'Duration' (2). To the right, the 'Owner' field shows 'Vanshiv Technologies'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons. A red box highlights the 'Save' button.



The screenshot shows the 'Course Details' list view again. A red box highlights the 'Recently Viewed' section, which now lists the newly created course record: '1 B.Sc (CA)'.

View Record (Course Details)

Viewing the Records of Course Detail Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on any record name. you can see the details of the Driver

The screenshot shows the Salesforce Lightning interface. At the top, there is a search bar with the text "Candidate Internal Result Card". Below the search bar, a modal window titled "Candidate Internal Result Card" is open, showing a list of items with one item selected. The main content area displays a banner with three cards: a white robot, a smartphone, and a jungle scene. Below the banner, there are navigation tabs: "Candidate Internal ...", "Semesters", "Candidates", "Course Details", "Lecturer Details", "Reports", and "Dashboards". The "Course Details" tab is highlighted with a red box. Underneath the tabs, there is a list of course details with columns for Course Name, Duration, and Created Date. The first four rows are highlighted with a red box. The list includes courses like BCA, BSc, Btech, and MBA.

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

The screenshot shows the Salesforce Object Manager. The left sidebar has a "Fields & Relationships" section selected. The main content area is titled "Course Details Field" and shows the "Course Details Name" field. It includes sections for "Field Information" (Field Label: Course Details Name, Data Type: Text(80), Description, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization) and "Validation Rules" (No validation rules defined). The status bar at the bottom indicates the URL as "gayatridegreecollege319-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5h000001un0P/FieldsAndRelationships/Name/view".

Delete Record (Course Details)

Deleting Records of Course Details Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

The image consists of three vertically stacked screenshots of the Salesforce Lightning Experience. Each screenshot shows a different step in the process of deleting a record from the 'Course Details' object.

- Screenshot 1:** Shows the App Launcher icon (grid of squares) highlighted with a red box. The search bar contains 'Candidate Internal Result Card'. The result 'Candidate Internal Result Card' is selected and highlighted with a red box. A small number '2' is next to the result.
- Screenshot 2:** Shows the 'Candidate Internal ...' page. The 'Course Details' tab is highlighted with a red box. The table lists four course details:

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

A red box highlights the edit icon (pencil) for the first row. A red box also highlights the 'Delete' button in the top right corner of the table header area. A small number '4' is next to the edit icon, and a small number '5' is next to the delete button.
- Screenshot 3:** Shows the 'Recently Viewed' section of the 'Course Details' page. The table lists four recently viewed course details:

	Course Details Name
1	B.Sc (MECS)
2	B.Com (CA)
3	B.Sc (MSCs)
4	B.Sc (BCCA)

A red box highlights the 'Delete' button in the top right corner of the table header area. A small number '6' is next to the delete button.

What Are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub-report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects. Once a report is created its report type cannot be changed.

There are 2 types of report types:

Standard Report Types: Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked. Standard report types cannot be customized and

automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

Custom Report Types: Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report.

The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

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

Editor: With this access level, users can view .

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

Create Report

1. Click App Launcher
2. Select Candidate Internal Result Card App
3. Click reports tab
4. Click New Report.
5. Click the report type as Semesters with Course Click Start report.
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this 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

The image consists of three vertically stacked screenshots of a report builder application interface. Each screenshot highlights specific UI elements with red boxes and numbers 1 through 8.

- Screenshot 1:** Shows the 'Setup' tab selected in the top navigation bar. A search bar at the top left contains the text 'Candidate Internal Result Card'. Below it, a sidebar titled 'Apps' shows a single item: 'Candidate Internal Result Card' (highlighted with a red box). The main area displays a decorative background with a robot and a smartphone.
- Screenshot 2:** Shows the 'Reports' tab selected in the top navigation bar. A search bar at the top left contains the text 'Search...'. Below it, a navigation bar includes 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Reports' (highlighted with a red box), and 'Dashboards'. On the right, there are buttons for 'New Report' (highlighted with a red box) and 'New Folder'.
- Screenshot 3:** Shows the 'Candidate Internal Result Report' page. The top navigation bar is identical to Screenshot 2. The main area features a table titled 'Semesters with Course'. The left sidebar, labeled 'Fields', has a 'Groups' section (highlighted with a red box) containing 'GROUP ROWS' and 'GROUP COLUMNS' options. The table data includes rows for 'BCA (1)', 'Subtotal', 'BSc (3)', 'Subtotal', and 'Btech (2)'. A 'Refresh' button (highlighted with a red box) is located above the table. On the right, there are buttons for 'Save & Run' (highlighted with a red box), 'Save', 'Close', and 'Run'.

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.

Fields > Outline > Semesters with Course

REPORT > Candidate Internal Result Report

Groups: GROUP ROWS, Duration, GROUP COLUMNS, Add group...

Columns: Add column..., Course: Owner Name, # Course: Duration

Field: Course: Duration, Bucket Name: Duration

Range	Bucket
<= 1	Small Course
> 1 to 2	Medium Course
> 2	Large Course

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

Cancel Apply

Save Report

* Report Name: Candidate Internal Result Report (boxed with red box 9)

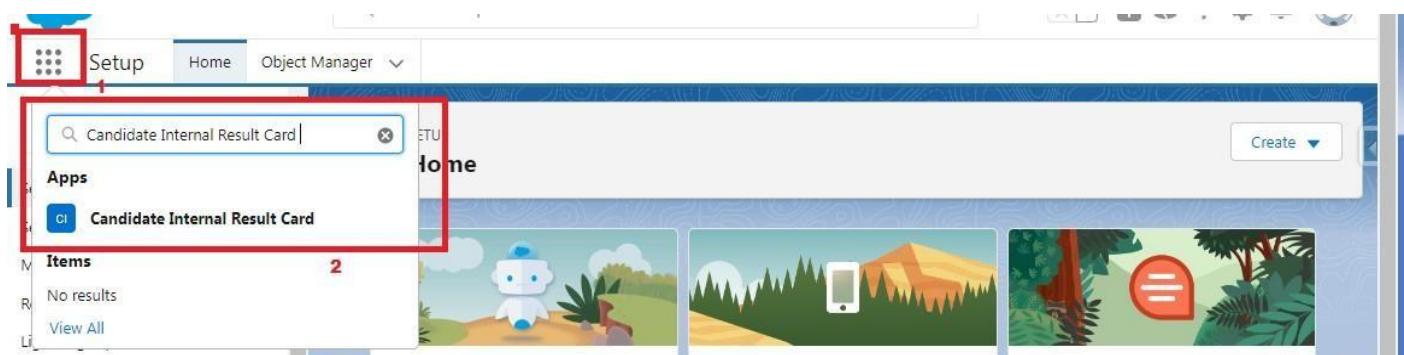
Report Unique Name: Candidate_Internal_Result_Report_bky

Report Description:

Save (boxed with red box 10)

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.



Search... Reports Dashboards

Recent

9 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Properties with Customer Name Report	Private Reports			8/4/2023, 12:48 pm	▼
Created by Me	Events with Attendees	Private Reports			6/4/2023, 4:35 pm	▼
Private Reports	Candidate Internal Result Report	Private Reports			9/4/2023, 7:57 pm	▼
Public Reports	Job application with candidate name	Private Reports			8/4/2023, 7:08 pm	▼
All Reports						▼

Smartinternz | Inbox (22) - lavanyakokkanti22@gmail.com | Lavanya .dox.docx - Google Doc | Candidate Internal Result Report | +

Report: Semesters with Course
Candidate Internal Result Report

Total Records
4

Course: Course Name	Course: Duration	3	Total
B.com (C.A)	Record Count	1	1
Bsc (BCCA)	Record Count	1	1
Bsc (MECS)	Record Count	1	1
Bsc (MSCS)	Record Count	1	1
Total	Record Count	4	4

Details (4 Rows) Click an intersection in the table above to filter details.

Semester: Semester Name	Course: Course Details Name	Duration
Semestre 05	B.Com (Computer Applications)	Large Course
Semister 05	Bsc (Bio-Technology,Chemistry,Computer Applications)	Large Course
Smester 03	Bsc (Mathematics,Electronics,Computer Science)	Large Course
Semester 01	Bsc (Mathematics,Statistics,Computer Science)	Large Course

Row Counts Detail Rows Grand Total Stacked Summaries

Type here to search

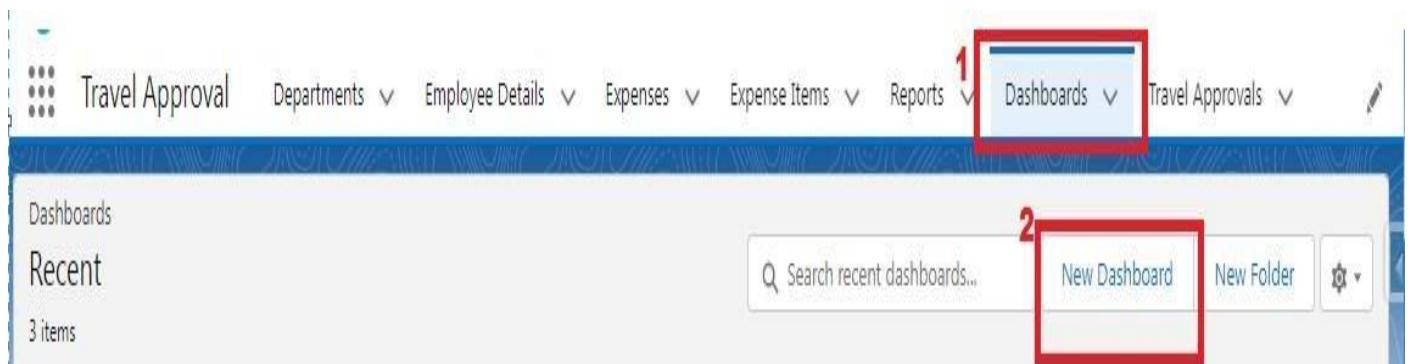
Milestone – 06: dashboards

Dashboards

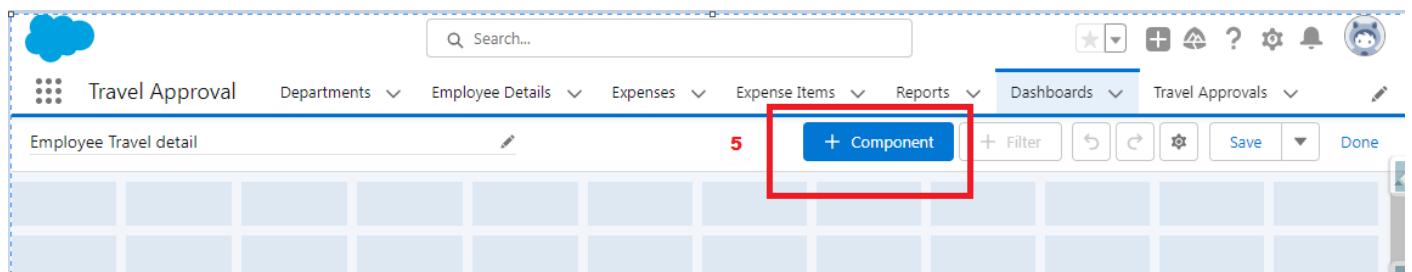
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, they can access your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

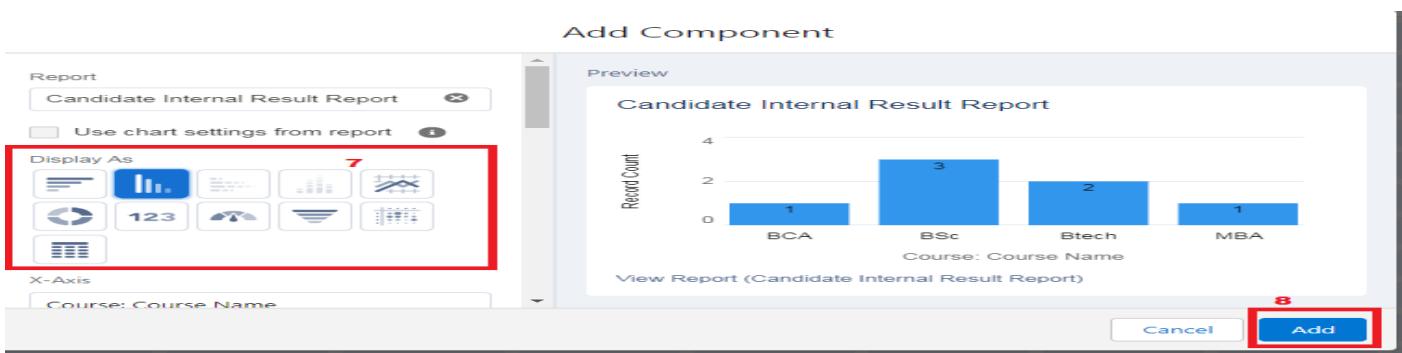
Create Dashboard

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



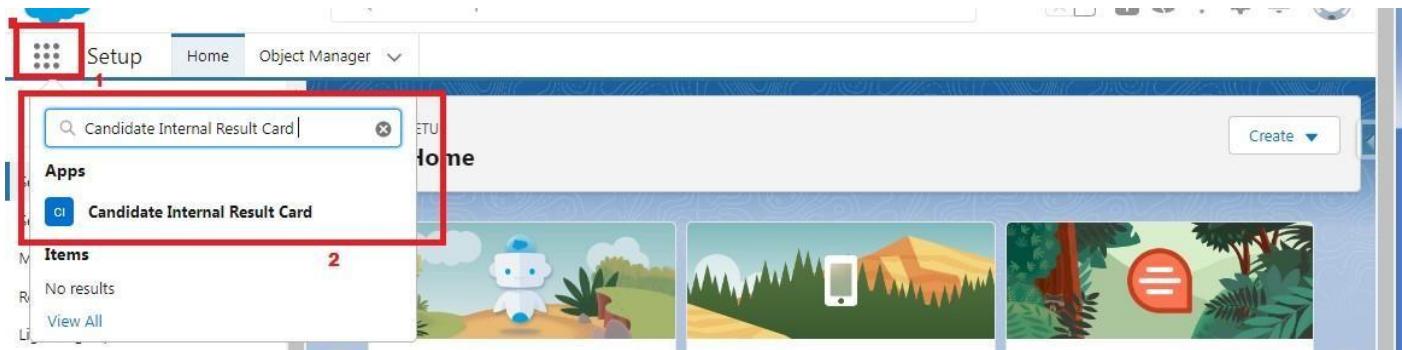
A screenshot of the 'New Dashboard' dialog box. It has fields for 'Name' (containing 'Candidate Internal Result Card'), 'Description' (with a placeholder '3'), 'Folder' (set to 'Private Dashboards'), and 'Select Folder' button. At the bottom are 'Cancel' and 'Create' buttons, with 'Create' highlighted with a red box and number '4'.





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



This screenshot shows the "Dashboards" list in the Candidate Internal Result Card application. A red box highlights the "Dashboards" tab in the top navigation. Another red box highlights the "Candidate Internal Result Card" dashboard in the list, which is the fourth item. A red number "3" is placed near the top right of the dashboard list area.

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

This screenshot shows the "Candidate Internal Result Card" dashboard itself. A red box highlights the dashboard title. Below it, a message says "As of 12-Oct-2023, 10:50 am - Viewing as LAVANYA KOKKANTI". The main content area displays a bar chart titled "Candidate Internal Result Report" with the subtitle "Course: Duration". The chart shows a count of 1 for each course duration category (3, 3, 3, 3). A red number "4" is placed near the chart area.

THE END

