

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.

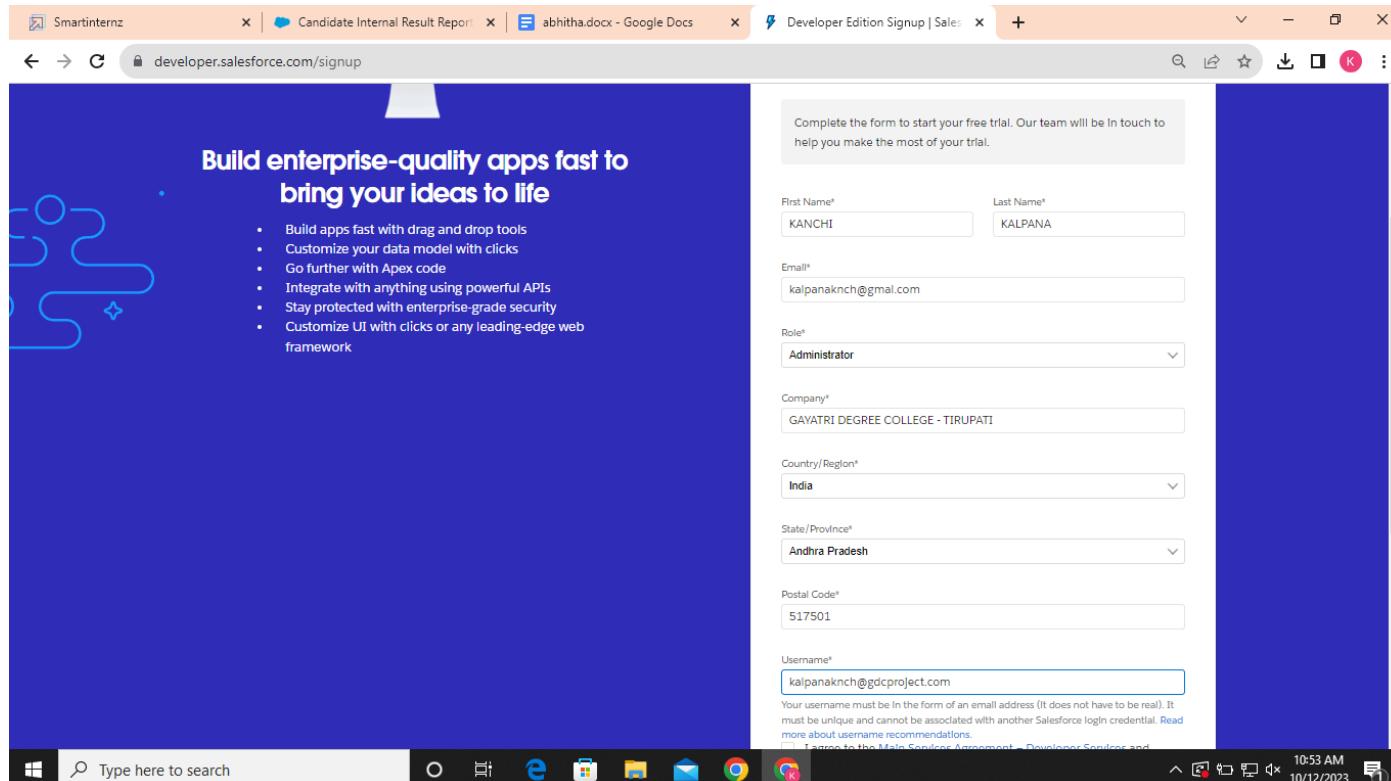
Milestone 01: Create Salesforce Org

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

Click on sign up.

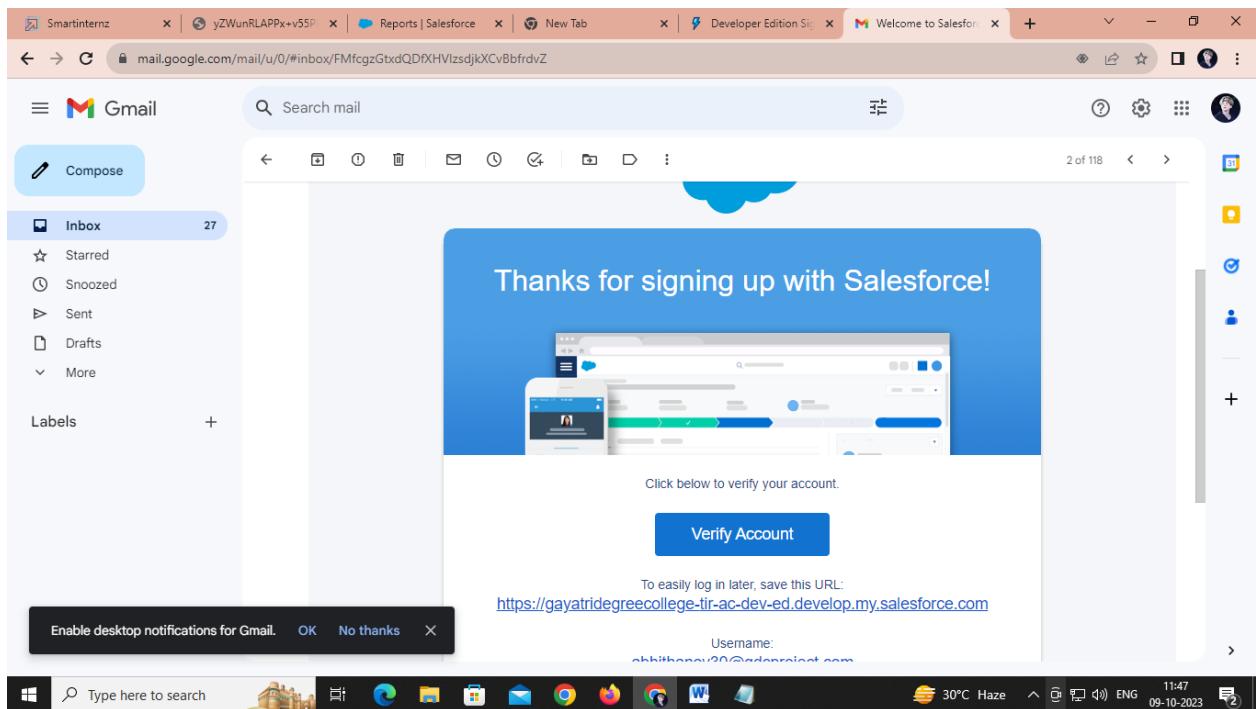
On the sign-up form, enter the following details:

1. First name & Last name – KANCHI KALPANA
2. Email – kalpanaknch@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username:kalpanaknch@gdcproject.com



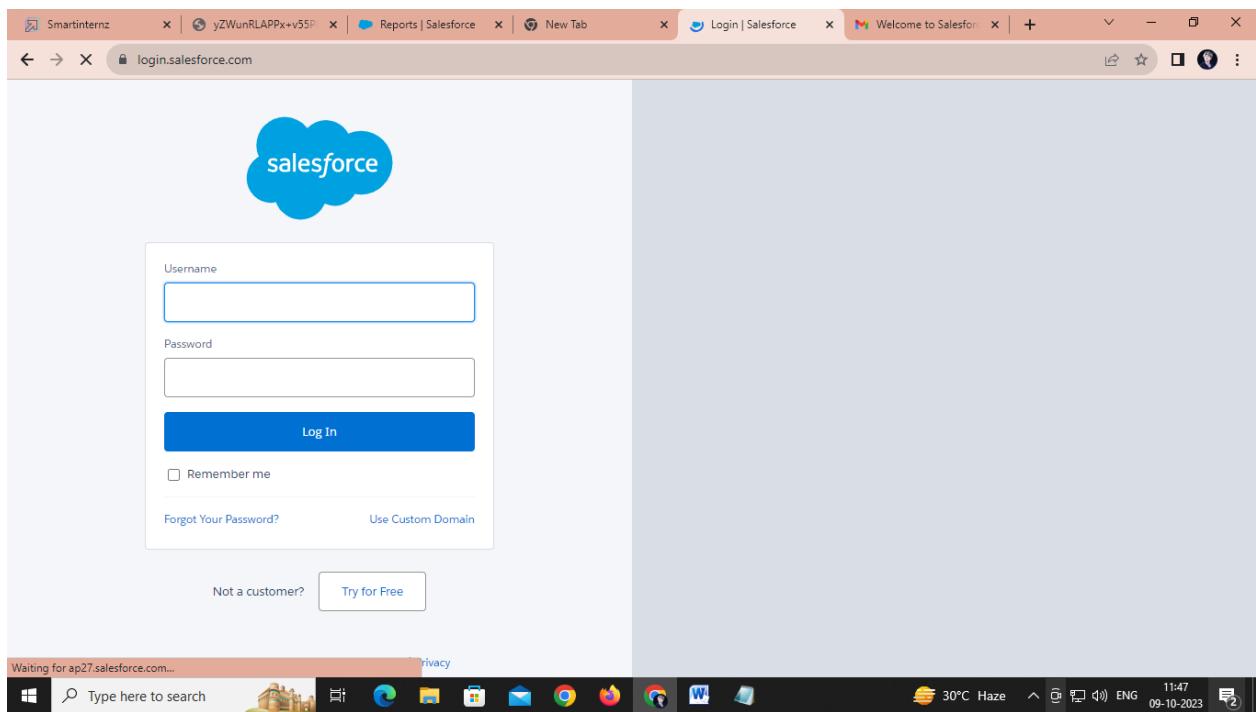
Account Activation

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

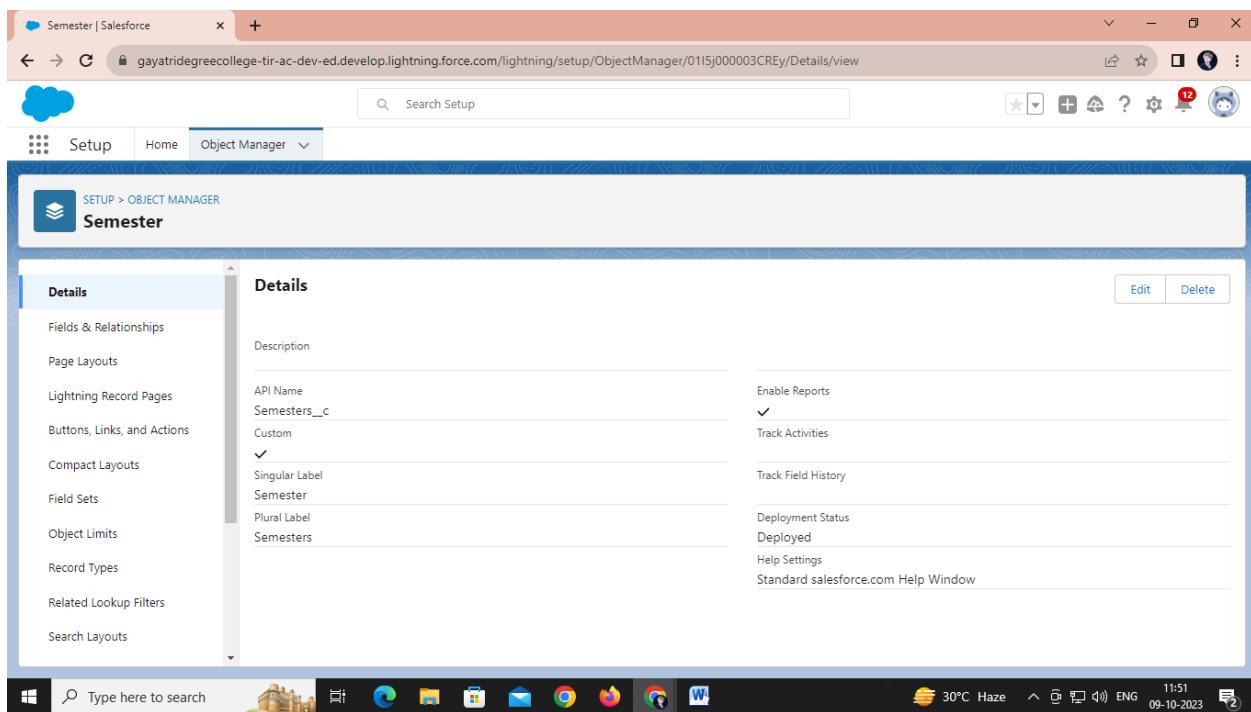
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Milestone – 02: Creation of Objects

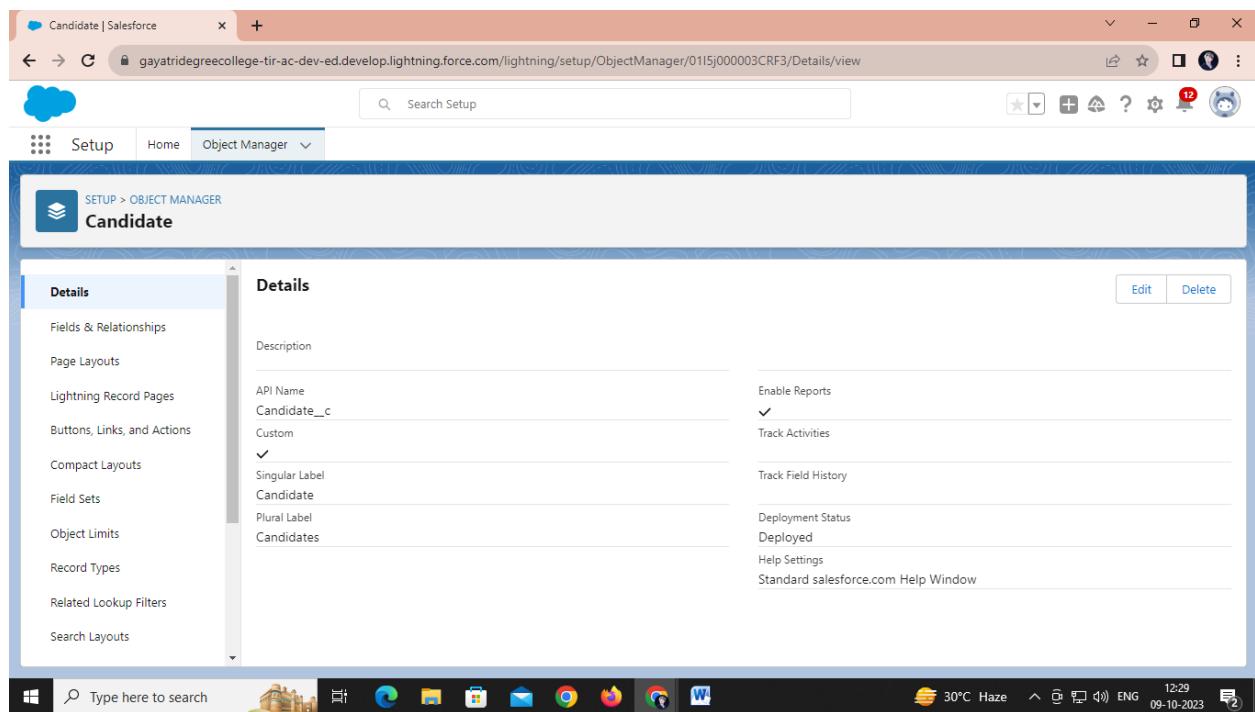
Object – Semester

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.



Object – Candidate

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



Object – Course Details

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

Course Details

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

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.

Lecturer Details

Details

Description

API Name: Lecturer_Details__c

Custom: ✓

Singular Label: Lecturer Details

Plural Label: Lecturer Details

Enable Reports: ✓

Track Activities: ✓

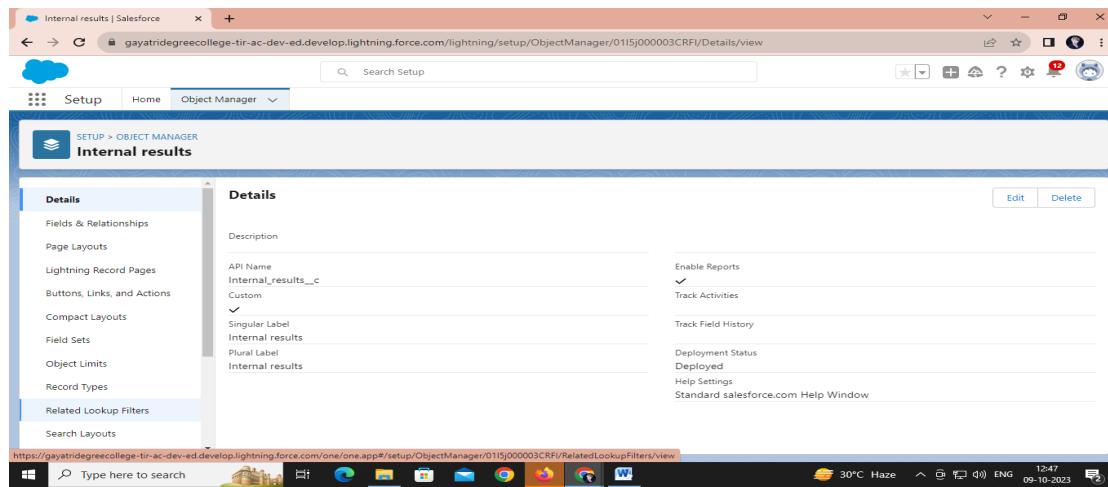
Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

1. Object – Internal results

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



Milestone – 03: Tabs

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

There are mainly 4 types of tabs:

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

Now create a custom tab. Click the Home tab.

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Tabs' and contains a section for 'Custom Object Tabs'. A table lists five tabs with their labels and tab styles:

Action	Label	Tab Style	Description
Edit Del	Candidates	Bell	
Edit Del	Course Details	Camera	
Edit Del	Internal results	Fan	
Edit Del	Lecturer Details	Diamond	
Edit Del	Semesters	Apple	

Below this are sections for 'Web Tabs' and 'Visualforce Tabs', both of which show a message indicating 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively.

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

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	Lookup (candidate) Formula

	Course Marks	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. At the top, there's a toolbar with various icons. Below it, the navigation bar has tabs for 'Setup' and 'Home', with 'Object Manager' selected and highlighted by a red box. To the right of the tabs is a search bar containing 'lect'. Further right are buttons for 'Schema Builder' and 'Create'. The main area is titled 'Object Manager' and shows a list of objects. One object, 'Lecturer Details', is highlighted with a red box. Its details are shown in a table: 'LABEL' is 'Lecturer Details', 'API NAME' is 'Lecturer_Details__c' (also highlighted with a red box), 'TYPE' is 'Custom Object', 'DESCRIPTION' is blank, 'LAST MODIFIED' is '06/04/2023', and 'DEPLOYED' has a checkmark. A red number '3' is placed at the bottom of this row.

This screenshot shows the 'Fields & Relationships' section within the Lecturer Details object setup. The sidebar on the left has tabs for 'Details', 'Fields & Relationships' (which is selected and highlighted with a red box), 'Page Layouts', and 'Lightning Record Pages'. A red number '4' is placed at the top left of the sidebar. The main area has a header with buttons for 'Quick Find', 'Deleted Field', 'Field Dependencies', and 'Set History Tracking'. A red box highlights the 'New' button in the top right. The main table lists fields: 'FIELD LABEL' (Address), 'FIELD NAME' (Address__c), 'DATA TYPE' (Text(50)), 'CONTROLLING FIELD' (empty), and 'INDEXED' (checkbox). A red number '5' is placed at the top center of the main table area.



Step 2. Enter the details

Step 2 of 4

Field Label	Lecturer Role 7	Previous	Next 8	Cancel
Length	40 9			
Field Name	Lecturer_Role			
Description				
Help Text				

Smartinternz Recently Viewed | Lecturer Details | Lightning Record Pages | abhitha.docx - Google Docs | Developer Edition Signup | +

gayatridegreecollegeit-1ef-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5j0000037Bje/FieldsAndRelationships/00N5j00000PqZyM/view

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		
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By KANCHI KALPANA, 09/10/2023, 10:02 am Modified By KANCHI KALPANA, 09/10/2023, 10:02 am

General Options

Required Unique Case Sensitive

Type here to search

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

lect

Lecturer Details Lecturer_Details__c Custom Object

4

5

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

6

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail 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.

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

Field Name: Semester Name

Description:

Help Text:

8

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

SETUP > OBJECT MANAGER
Semester

Details
Fields & Relationships

Semester Field
Semester Name
Back to Semester

Field Information

Field Label	Semester Name
Date Type	Text(50)
Description	
Data Owner	System
External ID	
Data Sensitivity Level	Compliance Categorization

Validation Rules

No validation rules defined.

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 Object Manager screen with a red box around the "Object Manager" tab in the top navigation bar. A red number "2" is placed above the search bar. A red box highlights the "lect" search term in the search bar. A red number "1" is located in the top right corner of the header.

Screenshot 2: Shows the "Fields & Relationships" section of the Object Manager. A red box highlights the "Fields & Relationships" tab in the left sidebar. A red number "4" is placed above this tab. A red box highlights the "New" button in the top right of the list area. A red number "5" is placed above the "New" button. The list shows two items: "Address" and "Created By".

Screenshot 3: Shows the "New Number Field" configuration page. A red box highlights the "Field Label" input field containing "Duration". A red number "6" is placed above this field. 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 5 and 2 decimal places can accept values up to "12345678.90"." A red box highlights the "Length" input field with the value "1". A red number "7" is placed above this field. A red box highlights the "Help Text" input field containing "Enter Course duration value in Years". A red number "7" is placed above this field.

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.

The screenshot shows the Salesforce Object Manager. A red box labeled '1' highlights the 'New' button in the top right corner. A red box labeled '2' highlights the 'Object Manager' tab in the top navigation bar. A red box labeled '3' highlights the API name 'Lecturer_Details__c' in the list of objects.

The screenshot shows the 'Fields & Relationships' section of the custom object creation page. A red box labeled '4' highlights the 'Fields & Relationships' tab in the sidebar. A red box labeled '5' highlights the 'New' button in the top right corner of the list table.

The screenshot shows the 'Data Type' selection screen. A red box labeled '6' highlights the 'Formula' radio button. The other options shown are 'None Selected' and 'Auto Number'. A tooltip for 'Formula' describes it as a read-only field derived from a formula expression.

Field Label **Candidate Roll Number** 7

Field Name **Candidate_Roll_Number** 8

Auto add to custom report type Add this field to existing custom report types that contain this entity 9

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `TOORIGIN > 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`

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

Example: `Full Name = LastName & ", " & FirstName` [More Examples...](#) 10 [Operators & Functions](#)

[Simple Formula](#) [Advanced Formula](#)

Insert Field 11 **Insert Operator** 12

`Candidate Roll Number (Text) =`

Functions

13 All Function Categories -- ▾

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Insert Field 14

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 15 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 16 Insert
--	---	---	---

17 Close

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Smartinternz, Recently Viewed, Candidate | Salesforce, abhitha.docx - Google Docs, and Developer Edition Signup. The main content area is titled "Candidate Custom Field Candidate Roll Number". The left sidebar has a "Fields & Relationships" section selected, listing options like 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 panel displays the "Custom Field Definition Detail" for "Candidate Roll Number". It shows the field label "Candidate Roll Number", field name "Candidate_Roll_Number", API name "Candidate_Roll_Number__c", object name "Candidate", data type "Auto Number", and other details such as description, help text, data owner, field usage, created by KANCHI KALPANA on 09/10/2023 at 12:46 pm, modified by KANCHI KALPANA on 09/10/2023 at 12:46 pm, and general options. A status bar at the bottom shows the date and time as 10/12/2023 and 11:04 AM.

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 page. The top navigation bar has tabs for Setup, Home, and Object Manager, with the Object Manager tab highlighted. The main content area is titled "Object Manager" and shows a table of objects. The first row in the table is highlighted with a red box and labeled "1". The second row, which is the newly created object, is also highlighted with a red box and labeled "2". The third column of the table, which contains the API name "Lecturer_Details__c", is highlighted with a red box and labeled "3". The table columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

Details

Fields & Relationships 4

11 Items, Sorted by Field Label

New 5 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)		

None Selected 1 Select one of the data types below.

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 7

Step 2. Enter the details Step 2 of 4

Previous Next Cancel 9

Field Label	Candidate Roll Number 7
Display Format	CAD-(000) Example: A-(0000) What Is This? 8
Starting Number	1
Field Name	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. On the left, there's a sidebar with various links: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a highlighted 'Users' link. Step 1 is a red box around the search bar containing 'user'. Step 2 is a red box around the 'Users' link in the sidebar. The main content area is titled 'All Users' and contains a grid of users. Step 3 is a red box around the 'New User' button at the top of the grid. Step 4 is a red box around the 'General Information' section of a 'User Edit' dialog, which includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, and Department.

This screenshot shows the 'User Edit' form. Step 4 is a red box around the 'General Information' section. Step 5 is a red box around the 'Role' dropdown menu, which is currently set to '<None Specified>'. Step 6 is a red box around the 'User License' dropdown set to 'Salesforce', the 'Profile' dropdown set to 'Standard User', and the 'Active' checkbox which is checked.

Milestone – 07: user adoption

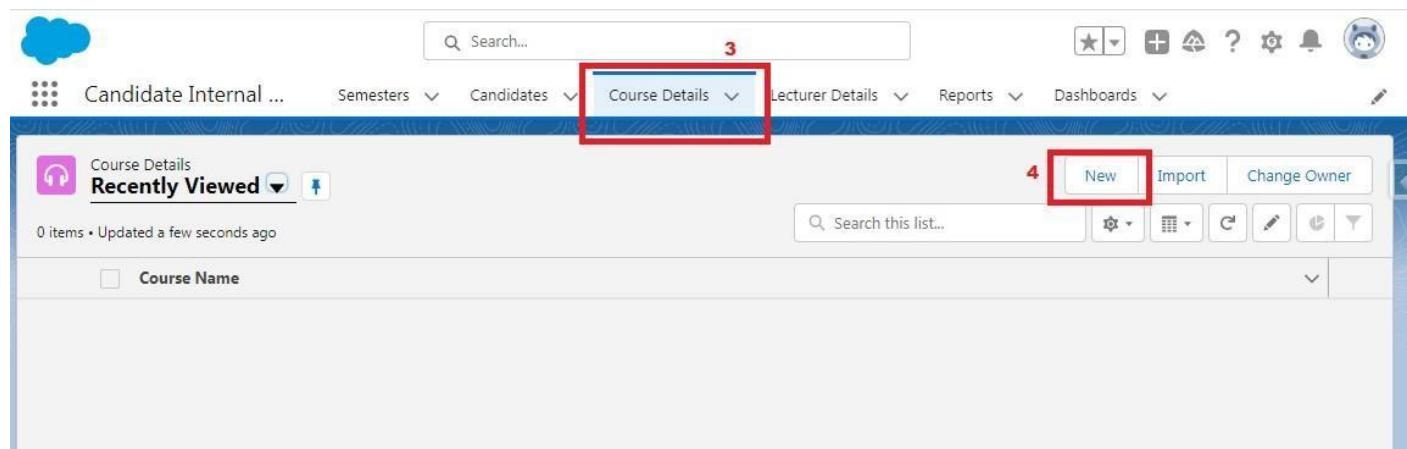
User Adoption

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.



A screenshot of the 'New Course Details' form. The form has a header 'New Course Details' and a section titled 'Information'. In the 'Information' section, there are two input fields: 'Course Name' (containing 'MBA') and 'Duration' (containing '2'). Both of these fields are highlighted with a red box and have a red number '5' next to them. To the right of these fields, there is an 'Owner' section showing 'Vanshiv Technologies'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box and has a red number '6' next to it.

View Record (Course Details)

Viewing the Records of Course Detail Object

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

Setup Home Object Manager

Candidate Internal Result Card

Apps Candidate Internal Result Card

Items 2

No results

View All

Candidate Internal ... Semesters Candidates³ Course Details Lecturer Details Reports Dashboards

Course Details All

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

	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

Screenshot of the Salesforce Lightning interface for Course Details. The page shows the following details:

- Course Details Name: B.Sc(Mathematics,Electronics,Computer Science)
- Duration: 2
- Course Name: B.Sc(MECs)
- Created By: KANCHI KALPANA, 09/10/2023, 2:45 pm
- Last Modified By: KANCHI KALPANA, 09/10/2023, 2:45 pm

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.

Screenshot of the Salesforce App Launcher. The 'Candidate Internal Result Card' app is selected and highlighted with a red box. The interface shows various app icons and a search bar.

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

Recently Viewed

	Course Details Name
1	B.Sc (MECS)
2	B.Com (C.A)
3	B.Sc (MSCS)
4	B.Sc (BCCA)

Milestone – 08: what are Reports?

What Are Reports?

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

There are 4 types of report formats in Salesforce:

Tabular Reports:

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

They are mainly used to generate a simple list or a list with a grand total.

Summary Reports:

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

Matrix Report:

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

Joined Reports:

These types of reports let us create different views of data from multiple report types. The data 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 interface, likely from a cloud-based platform like Salesforce or similar. Each screenshot shows a different stage of the report creation process:

- Screenshot 1 (Top):** Shows the app launcher with 'Candidate Internal Result Card' selected. A red box highlights the 'Setup' icon in the top left. A red box also highlights the search bar and the 'Candidate Internal Result Card' item in the search results.
- Screenshot 2 (Middle):** Shows the 'Reports' tab selected in the top navigation bar. A red box highlights the 'Reports' tab. Another red box highlights the 'New Report' button in the top right corner.
- Screenshot 3 (Bottom):** Shows the report builder page for 'Semesters with Course'. A red box highlights the 'Fields' pane on the left, which contains sections for 'Groups' (with 'GROUP ROWS' and 'Course: Course Name' selected) and 'Groups' (with 'GROUP COLUMNS' and 'Course: Duration' selected). A red box highlights the 'Refresh' button at the top of the report preview area. Another red box highlights the 'Save & Run' button in the top right of the preview area.

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.

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

Save Report

Report Name 9

Report Unique Name

Report Description

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.

The image consists of two screenshots of a CRM application interface, likely Salesforce.

Top Screenshot: Shows the Home screen with the 'Candidate Internal Result Card' app card selected. A red box highlights the app card in the 'Apps' section. The search bar at the top contains 'Candidate Internal Result Card'. The sidebar on the left shows 'Items' with 'No results' and a 'View All' link. The number '2' is displayed in the top right corner.

Bottom Screenshot: Shows the 'Reports' section. A red box highlights the 'Reports' button in the top navigation bar. The main area displays a list of recent reports. The report titled 'Candidate Internal Result Report' is highlighted with a red box. The list includes:

Report Name	Description	Folder	Created On
Properties with Customer Name Report	Private Reports		8/4/2023, 12:48 pm
Events with Attendees	Private Reports		6/4/2023, 4:35 pm
Candidate Internal Result Report	Private Reports		9/4/2023, 7:57 pm
job application with candidate name	Private Reports		8/4/2023, 7:08 pm

Candidate Internal Result Report

Semester Name: Course ↑	Candidate: Candidate Name ↓	Semester Name: Semester Name ↓
B.Com(Computer Applications) (1)	Bhavya	Semester 05
Subtotal		
B.Sc(Bio Technology,Chemistry,Computer Applications) (1)	sowmya	Semester 05
Subtotal		
B.Sc(Mathematics,Electronics,Computer Science) (1)	jyotsna	Semester 03
Subtotal		
B.Sc(Mathematics, Statistics, Computer Science) (1)	kalpana	Semester 01
Subtotal		
Total (4)		

Milestone – 06: dashboards

Dashboards

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

Create Dashboard

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

The screenshot shows the application's main navigation bar with several menu items: Travel Approval, Departments, Employee Details, Expenses, Expense Items, Reports, Dashboards (which is highlighted with a red box), and Travel Approvals. Below the navigation bar is a search bar labeled "Search recent dashboards..." and buttons for "New Dashboard" (highlighted with a red box) and "New Folder".

New Dashboard

* Name
Candidate Internal Result Card |

Description 3

Folder
Private Dashboards Select Folder

4 Cancel Create

This screenshot shows the "New Dashboard" creation dialog. It includes fields for "Name" (Candidate Internal Result Card), "Description" (empty), "Folder" (Private Dashboards), and a "Create" button.

The screenshot shows the dashboard editor interface. At the top, there is a toolbar with various icons. In the center, there is a grid of empty dashboard slots. A "Report" component is currently being added, indicated by a dashed border around its preview area. The "Add Component" button is highlighted with a red box.

Add Component

Report
Candidate Internal Result Report 5

Display As
+ Component + Filter 6 7 8 Done

Preview
Candidate Internal Result Report
Record Count
Course: Course Name
View Report (Candidate Internal Result Report)

Cancel Add

This screenshot shows the "Add Component" dialog for a "Report" component. It displays a preview of the "Candidate Internal Result Report" showing a bar chart with data for BCA, BSc, BTech, and MBA courses. The "Add" button is highlighted with a red box.

Screenshots of the Candidate Internal Result Report dashboard:

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Candidate Internal Result Report		Private Dashboards	KANCHI KALPANA	9/10/2023, 6:19 pm	

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

Screenshot of the Salesforce App Launcher:

- Search bar: Candidate Internal Result Card
- Apps section:
 - Candidate Internal Result Card (highlighted with a red box)
- Create button: Create ▾

Semesters Candidates Course Details Lecturer Details Reports Dashboards

3

Dashboards

Recent 8 items

Search recent dashboards... New Dashboard New Folder

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	4	Private Dashboards		9/4/2023, 8:00 pm	
FOLDERS	Travel Approval		Private Dashboards		3/4/2023, 12:58 pm	
All Folders	Employee Travel detail		Private Dashboards		8/4/2023, 12:22 pm	

Smartinternz Candidate Internal Result Re Candidate | Salesforce abhitha.docx - Google Docs Developer Edition Signup | +

gayatridgegreecollegeir-1ef-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z5j0000007POzEAM/view?queryScope=userFolders

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

Dashboard Candidate Internal Result Report

Last refreshed 2 days ago. Refresh this dashboard to see the latest data.

As of 09-Oct-2023, 6:31 pm Viewing as KANCHI KALPANA

Refresh Edit Subscribe

Candidate Internal Result Report

Record Count

1 1 1 1

B.Com(Co... B.Sc(Bio Te... B.Sc(Mathe... B.Sc(Mathe...

Semester Name: Course

View Report (Candidate Internal Result Report)

Type here to search

11:09 AM 10/12/2023

THE END

