

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 crosstechnology 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

Click on sign up.

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

1. First name & Last name – REDDY BHAVANA V R
2. Email – reddybhavanavr@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501

First Name*
REDDY BHAVANA

Last Name*
VR

Email*
reddybhavanavr@gmail.com

Role*
Administrator

Company*
GAYATRI DEGREE COLLEGE-TIRUPATI

Country/Region*
India

Postal Code*
517501

Username*
reddybhavanavr@gdcproject.com

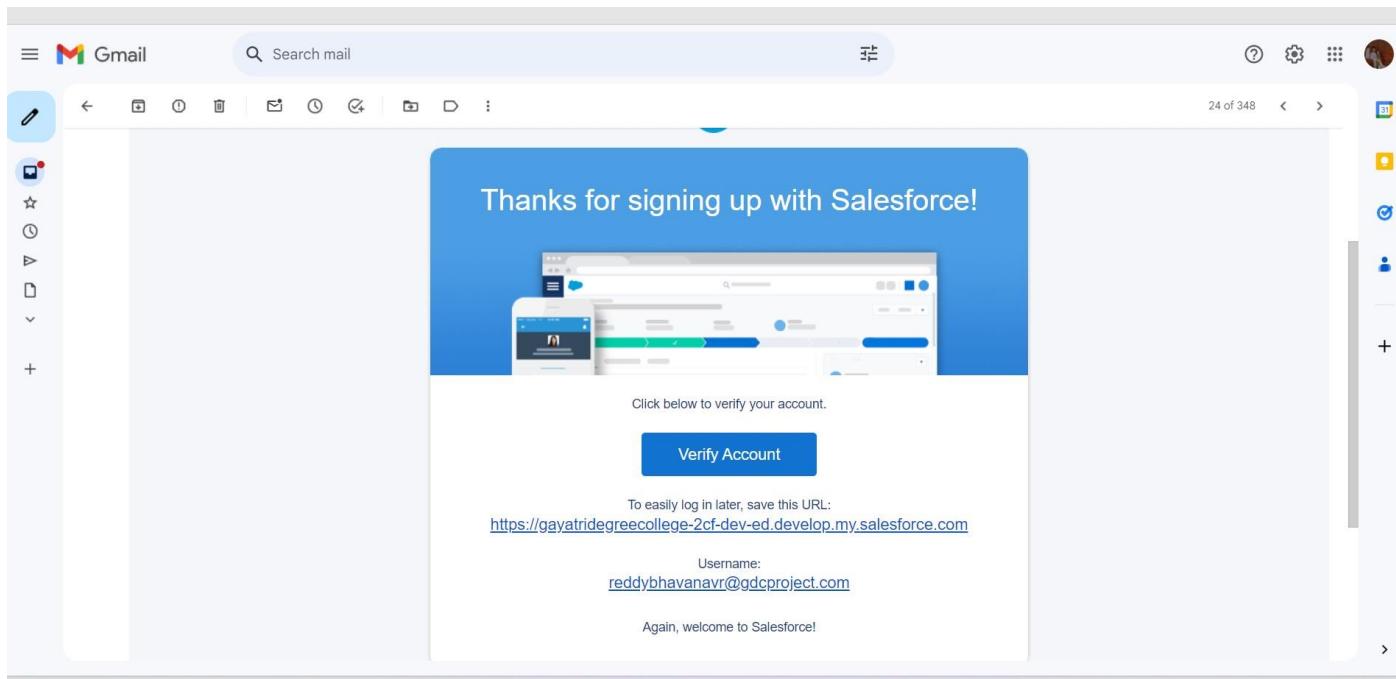
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

7. Username:reddybhavanavr@gdcproject.com
- 8.

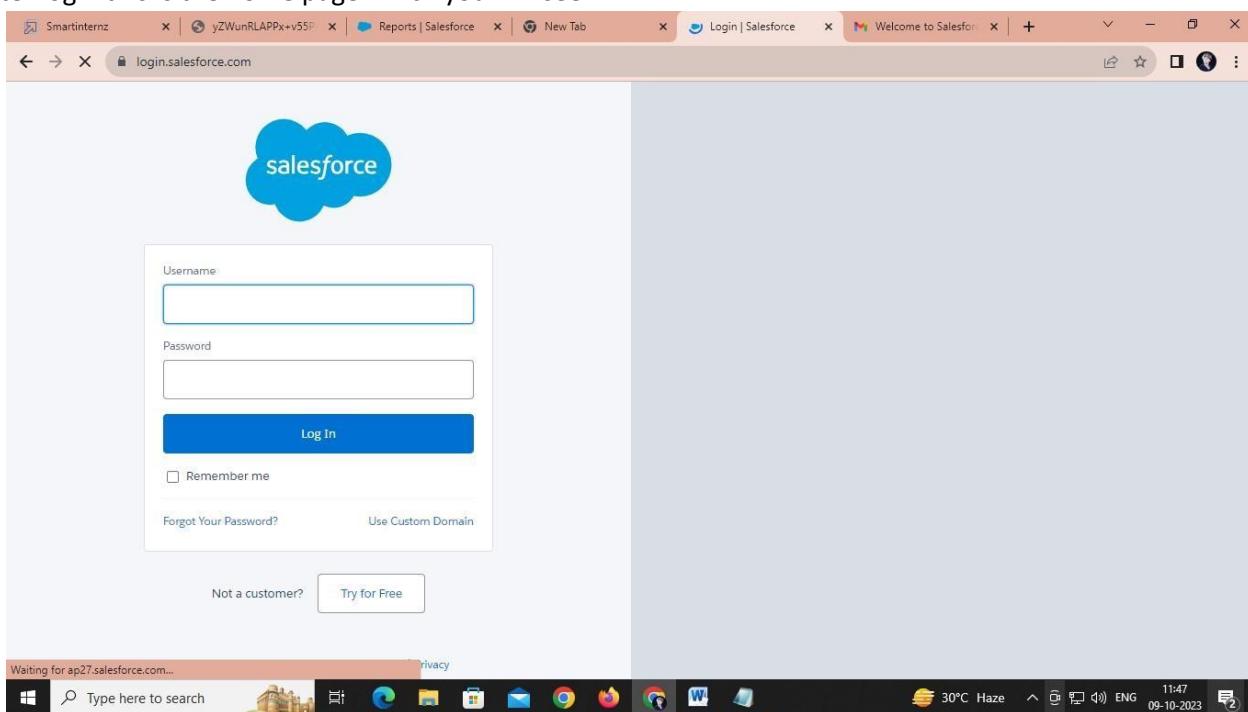
Account Activation

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.



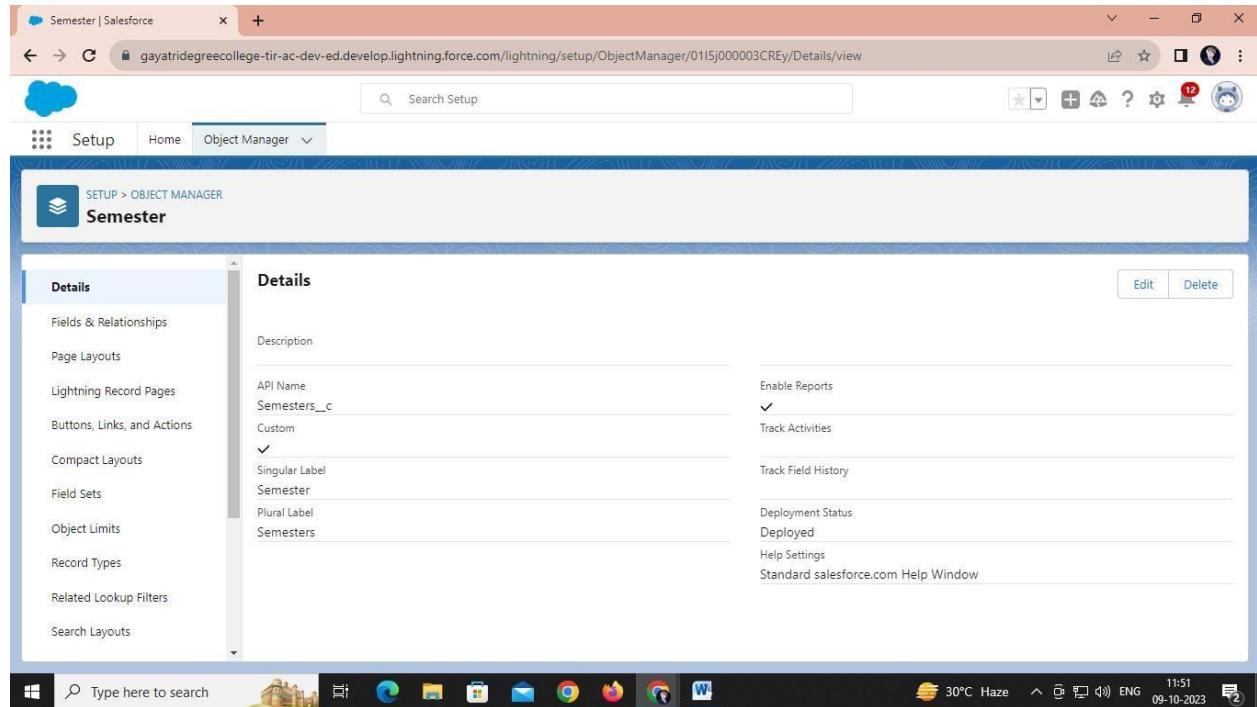
Milestone – 02: Creation of Objects

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

Candidate

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

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. 10.Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'Lecturer Details' under 'OBJECT MANAGER'. The left sidebar 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, and Search Layouts. The right panel displays the 'Details' section for the 'Lecturer Details' object. It shows the API Name as 'Lecturer_Details__c', which is marked as 'Custom' with a checked checkbox. Other fields include Singular Label ('Lecturer Details'), Plural Label ('Lecturer Details'), and several checkboxes for reports, activities, field history, deployment status, and help settings. At the bottom right of the panel are 'Edit' and 'Delete' buttons.

1. Object – Internal results

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: – **Internal results**
6. Plural Label: Internal results
7. Record Name: Internal results Name
8. Check the Allow Reports
9. Check the Allow Search 10. 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 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.

Custom Object Tabs		New	What Is This?	Help for this Page
Action	Label	Tab Style	Description	
Edit Del	Candidates			
Edit Del	Course Details			
Edit Del	Internal results			
Edit Del	Lecturer Details			
Edit Del	Semesters			

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

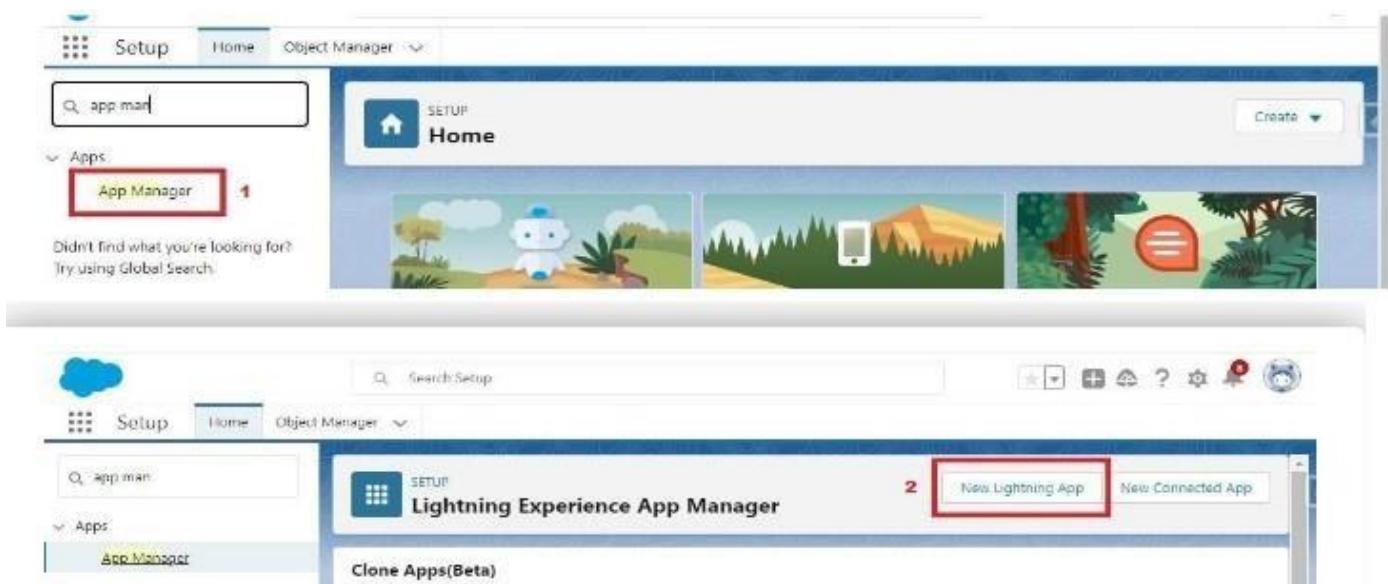
4. Under App Options, leave the default selections and click next.

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



App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

3

* App Name ⓘ
Candidate Internal Result Card

* Developer Name ⓘ
Candidate_Internal_Result_Card

Description ⓘ

App Branding

Image ⓘ

Primary Color Hex
Value ⓘ

Next

New Lightning App

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

6

Available Items

Dashboards

Semesters

Candidates

Course Details

Lecturer Details

Reports

Back **Next**

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 Object Manager interface. A red box labeled '1' highlights the top navigation bar. A red box labeled '2' highlights the 'Object Manager' tab. A red box labeled '3' highlights the 'Lecturer_Details__c' row in the list.

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

The screenshot shows the 'Fields & Relationships' section of the object configuration. A red box labeled '4' highlights the 'Fields & Relationships' tab. A red box labeled '5' highlights the 'New' button. A red box labeled '6' highlights the 'Text' field type option. The 'Text' type is selected, indicated by a checked radio button.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text()		
Created By	CreatedBy	Lookup(List)		

Text (selected)
 Allows users to enter any combination of letters and numbers.
 Allows users to enter a percentage number, for example, '10%', and automatically adds the percent sign to the number.
 Allows users to enter any phone number. Automatically formats it as a phone number.
 Allows users to select a value from a list you define.
 Allows users to select multiple values from a list you define.
 Allows users to enter any combination of letters and numbers.
 Allows users to enter up to 32K characters on separate lines.
 Allows users to enter up to 131,072 characters on separate lines.
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
 Allows users to enter any combination of letters and numbers and store them in encrypted form.
 Allows users to enter a valid time. For example, '12:40 PM', '114:40', '124:40:00', and '114:40:00:00' are all valid times for this field.
 Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

The screenshot shows the 'Step 2 of 4' configuration step. A red box labeled '7' highlights the 'Field Label' input field containing 'Lecturer Role'. A red box labeled '8' highlights the 'Length' input field containing '40'. A red box labeled '9' highlights the 'Next' button.

Field Label:	Lecturer Role
Length:	40
Field Name:	Lecturer_Role
Description:	
Help Text:	

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.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		08/04/2023	<input checked="" type="checkbox"/>

Details

Fields & Relationships 4

Page Layouts

Lightning Record Pages

Formula

Rollup Summary

Lookup Relationship 6

Master-Detail Relationship

Step 2: Choose the related object Step 2

Select the other object to which this object is related.

Related To: Semester 7

Field Label: Semester Name 8

Field Name: Semester Name

Description:

Help Text:

Fields & Relationships

11 items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

5

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

8001700016020C

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.

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

Step 2

Previous Next Cancel

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

Description:

Help Text:

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

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Setup Home Object Manager

SETUP > OBJECT MANAGER Semester

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 Scoping Rules

Semester Field Semester Name Back to Semester

Field Information

Field Label	Semester Name
Data Type	Text(60)
Description	
Owner	
Field Type	
Data Sensitivity Level	Compliance Categorization

Validation Rules

No validation rules defined

Help for this Page

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, there is a navigation bar with tabs: 'Setup' (highlighted with a red box), 'Home', and 'Object Manager'. A search bar is located above the tabs. To the right of the tabs are several icons: a gear (Setup), a question mark (Help), a refresh symbol, and other standard icons. Below the navigation bar is the 'Object Manager' section. It has a title 'Object Manager' with a 'SETUP' button. A search bar contains the text 'lect'. There are 'Schema Builder' and 'Create' buttons. A table lists objects: 'Lecturer Details' (API Name: 'Lecturer_Details__c', Type: 'Custom Object'). The 'Create' button for this object is highlighted with a red box and labeled '3'. In the bottom-left corner of the main area, there is a sidebar with links: 'Details', 'Fields & Relationships' (highlighted with a red box and labeled '4'), 'Page Layouts', and 'Lightning Record Pages'. The 'Fields & Relationships' link is underlined. The main content area has a title 'Fields & Relationships' with a note '11 Items, Sorted by Field Label'. It includes a 'Quick Find' search bar, a 'New' button (highlighted with a red box and labeled '5'), and buttons for 'Deleted Field', 'Field Dependencies', and 'Set History Tracking'. The table lists fields: 'Address' (Field Label: 'Address', Field Name: 'Address_c', Data Type: 'Text(50)'), and 'Created By' (Field Label: 'Created By', Field Name: 'CreatedBy', Data Type: 'Lookup(User)').

The screenshot shows the 'Field Label' input field containing 'Duration' highlighted with a red box. 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 "12345678.90".' To the right, there are two input fields: 'Length' (set to 1) and 'Decimal Places' (set to 2). Below these are 'Field Name' (Duration) and 'Description' (empty). At the bottom, 'Help Text' contains 'Enter Course duration value in Years.' A red box highlights this help text area.

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
11.Click Next, Next, then Save.

The screenshot shows the 'Object Manager' screen. The top navigation bar has 'Setup' and 'Object Manager' selected. A red box highlights the 'Object Manager' tab. The main table lists one item: 'Lecturer Details' (API Name: 'Lecturer_Details__c'). The 'Type' is 'Custom Object'. The 'Last Modified' date is '08/04/2023' and the 'Deployed' status is checked. A red box highlights the 'Lecturer_Details__c' API name. The top right of the screen has a toolbar with various icons, one of which is highlighted with a red box.

The screenshot shows the 'Fields & Relationships' screen. The top navigation bar has 'Fields & Relationships' selected, indicated by a red box. The main table lists two fields: 'Address' (Field Label: 'Address', Field Name: 'Address__c', Data Type: 'Text(50)', Controlling Field: empty, Indexed: checked) and 'Created By' (Field Label: 'Created By', Field Name: 'CreatedById', Data Type: 'LookupUser', Controlling Field: empty, Indexed: empty). A red box highlights the 'New' button in the top right corner of the table header. The top right of the screen has a toolbar with various icons, one of which is highlighted with a red box.

Data Type

Select one of the data types below.

<input type="radio"/> None Selected	None Selected
<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	6 A ready-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 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: [TODAY() > 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: [Fahrmehd * 1.5 * Census_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: [E = FullName + FirstName + " " + MiddleName]

Example: Full Name = LastName & " " & FirstName More Examples... 10

Simple Formula Advanced Formula

Insert Field 11 Insert Operator 12

Candidate Roll Number (Text) =

Functions

All Function Categories

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Functions

Insert Field 10

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Internal results >	Candidate	Address	You have selected:
\$Api >	Candidate >	Candidate Name	Candidate_c.Candidate_Roll_Number_c
\$Organization >	Created By >	Candidate Roll Number	Type: Auto Number
\$Profile >	Created By ID		API Name: Candidate_c.Candidate_Roll_Number_c
\$System >	Created Date		
\$User >	Internal results Name		
\$UserRole >	Last Modified By >		
	Last Modified By ID		
	Last Modified Date	Email	

Insert

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Candidate Custom Field Candidate Roll Number' with a 'Back to Candidate' link. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Buttons, Links, and Actions', and 'Field Sets'. The central panel displays the 'Custom Field Definition Detail' for 'Candidate Roll Number'. It includes sections for 'Field Information' (Field Label: Candidate Roll Number, Field Name: Candidate_Roll_Number, API Name: Candidate_Roll_Number__c), 'General Options' (External ID: checked), and 'Auto Number Options' (Display Format: Gdc-(000)). A status bar at the bottom right indicates the object name is 'Candidate' and the data type is 'Auto Number'. The URL in the browser is https://gayatridegreecollege-2cf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5g000003Ekbg/FieldsAndRelationships/00N5... .

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. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Object Manager' with a sub-header '1 Item. Sorted by Label'. The search bar contains 'lect' and there are buttons for 'Schema Builder' and 'Create'. The table below lists objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is selected, highlighted with a red box, showing 'Lecturer Details' in the LABEL column and 'Lecturer_Details__c' in the API NAME column. The URL in the browser is https://gayatridegreecollege-2cf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5g000003Ekbg/FieldsAndRelationships/00N5... .

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		08/04/2023	<input checked="" type="checkbox"/>

The screenshot shows the 'Fields & Relationships' section of the Salesforce setup. A red box highlights the 'Fields & Relationships' tab in the sidebar. A red number '4' is placed next to it. The main area displays two fields: 'Address' (Text(50)) and 'Created By' (Lookup(User)). The top navigation bar includes 'Quick Find', 'New' (highlighted with a red box), 'Deleted Field', 'Field Dependencies', and 'Set History Tracking'. A red number '5' is placed next to the 'New' button.

The screenshot shows the 'New Custom Field' creation process, Step 2. A red box highlights the 'Auto Number' radio button, which is selected. A red number '6' is placed next to it. Below the radio buttons, there are three options: 'None Selected' (radio button), 'Auto Number' (radio button selected), 'Formula' (radio button), and 'Roll-Up Summary' (checkbox). A red box highlights the 'Field Label' input field containing 'Candidate Roll Number'. A red number '7' is placed next to it. The 'Display Format' input field contains '(CAD)-(000)'. A red box highlights the 'Starting Number' input field containing '1'. A red number '8' is placed next to it. To the right of the starting number field is an 'Example: A-(0000) [What is This?](#)' link. A red box highlights the 'Field Name' input field containing 'Candidate_Roll_Number'. A red number '9' is placed next to it. The 'Description' and 'Help Text' input fields are empty. The top right corner shows 'Step 2 of 4' and 'Next' (highlighted with a red box).

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.

Setup Home Object Manager

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download Salesforce® to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1-User	u1	utkarsh2@vanshiv.com	Operator 1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2-User	u2	utkarsh3@vanshiv.com	Operator 2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rs8ake1.muir0jkfxf1@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Technologies Vanshiv	VTech	vehicledemo@vanshiv.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Teddy.John	Jted	utkarsh1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

New User | Reset Password(s) | Add Multiple Users

User Edit

Save | Save & New | Cancel

General Information

First Name: Class
Last Name: Teacher
Alias: cteach
Email: +++@++++.com
Username: +++@++++.com
Nickname: class
Title:
Company:
Department:

Role: <None Specified>
User License: Salesforce
Profile: Standard User
Active:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:

Milestone – 07: user adoption

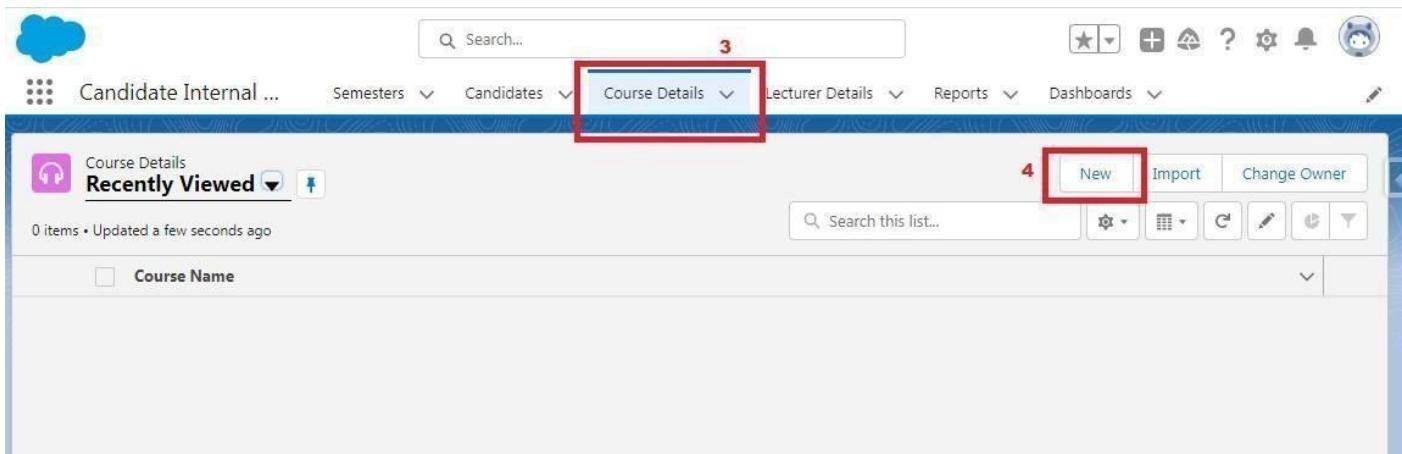
User Adoption

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.



New Course Details

This screenshot shows the 'New Course Details' form. On the left, there is a section titled 'Information' containing fields for 'Course Name' (MBA) and 'Duration' (2). These fields are highlighted with a red box and number '5'. To the right, there is an 'Owner' section showing 'Vanshiv Technologies'. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and a large blue 'Save' button, which is highlighted with a red box and number '6'.

This screenshot shows a list view of 'Course Details'. The table has columns for 'Course Details Name' and other details. There are four records listed: 1. MBA (Finance), 2. BTech, 3. BSC, and 4. BCA. The entire table area is highlighted with a red box and number '7'.

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 Zoho CRM interface. At the top, there is a search bar with the text "Candidate Internal Result Card". Below it, a sidebar displays the "Candidate Internal Result Card" app under the "Apps" section. The main area shows a list of "Course Details" with four items: BCA, BSc, Btech, and MBA. The record for "MBA" is highlighted with a red box. The bottom part of the screenshot shows a detailed view of the "MBA (Finance)" record, including fields like Course Details Name, Duration, and Owner.

	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

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 screenshots illustrate the Salesforce interface for managing course details. The top two screenshots show the 'Course Details' list view, which displays four items: BCA, BSc, Btech, and MBA. Each item has a checkbox, duration, and creation date. A red box highlights the 'Course Details' dropdown menu. In the third screenshot, a delete confirmation dialog is shown for the MBA record.

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

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

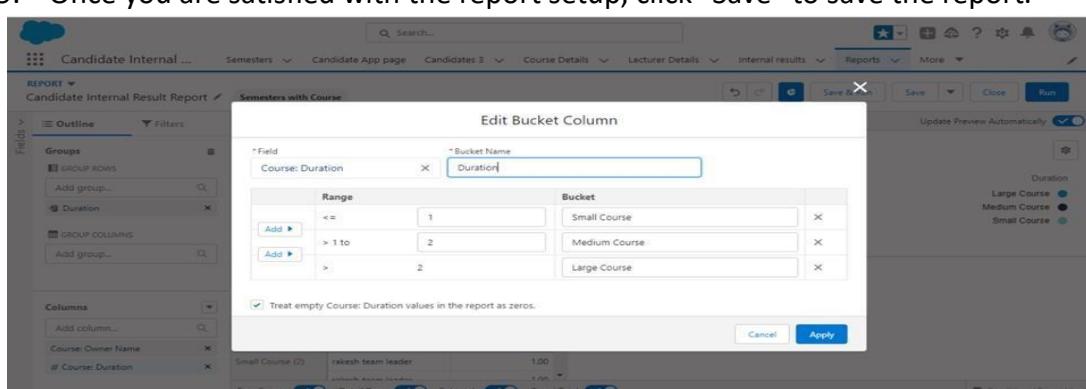
1. Click App Launcher
2. Select Candidate Internal Result Card App
3. Click reports tab
4. Click New Report.
5. Click the report type as Semesters with Course Click Start report.
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a 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 the Candidate Internal Result Card app interface, illustrating the steps to create a report.

- Screenshot 1:** Shows the app launcher with "Candidate Internal Result Card" selected. A red box highlights the "Setup" icon in the top navigation bar.
- Screenshot 2:** Shows the main dashboard with the "Reports" tab selected (highlighted by a red box). A red box highlights the "New Report" button in the top right corner.
- Screenshot 3:** Shows the report configuration screen for "Semesters with Course".
 - Left Panel (Groups):** Shows "GROUP ROWS" set to "Course: Course Name" (highlighted by a red box) and "GROUP COLUMNS" set to "Course: Duration" (highlighted by a red box).
 - Top Bar:** Includes a "Refresh" button (highlighted by a red box), "Add Chart" button, and "Save & Run" button (highlighted by a red box).
 - Report Preview:** Displays a matrix table with data:

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

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.



Save Report

* Report Name Candidate Internal Result Report	9
Report Unique Name Candidate_Internal_Result_Report_bkY	
Report Description	
<input type="button" value="Cancel"/> <input style="background-color: #0078D4; color: white; border: none; padding: 5px 10px; border-radius: 5px; font-weight: bold; margin-left: 10px;" type="button" value="Save"/> 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 screenshot shows a CRM application interface. At the top, there is a navigation bar with 'Setup' (highlighted with a red box), 'Home', and 'Object Manager'. Below the navigation bar is a search bar containing 'Candidate Internal Result Card' with a magnifying glass icon and a close button. To the right of the search bar is a 'Create' button with a downward arrow. A dropdown menu titled 'Candidate Internal Result Card' is open, showing one item listed under 'Items' with a count of '2'. The main area is titled 'Home' and features three decorative cards: a white robot, a smartphone, and a jungle scene. Below the cards is a search bar with 'Search...' placeholder text, followed by a series of icons: star, plus, question mark, gear, bell, and GitHub. The main content area is titled 'Candidate Internal ...' and includes filters for 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', and a 'Reports' tab (highlighted with a red box). On the left, a sidebar titled 'Reports' shows sections for 'Recent' (9 items) and 'RECENT' (with a red box around it). Under 'RECENT', there are four entries: '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' (highlighted with a red box and labeled '4'), and 'Job application with candidate name' (Private Reports, 8/4/2023, 7:08 pm). There are also links for 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'.

Report Name	Description	Folder	Created By	Created On	Subscribed
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	



Report: Semesters with Course
Candidate Internal Result Report

Total Records

7

<input type="checkbox"/> Course: Course Name ↑ ↓	Semester: Semester Name ↓	Course: Course Details Name	<input checked="" type="checkbox"/> Duration ↓
<input type="checkbox"/> B.Tech (2)	Semester 03	B.Tech (Mechanical)	Large Course
	Semester 02	B.Tech (Automobile)	Large Course
Subtotal			
<input type="checkbox"/> BCA (1)	Semester 06	BCA (Data Science)	Small Course
Subtotal			
<input type="checkbox"/> BSC (3)	Semester 04	B.SC (Nursing)	Medium Course
	Semester 05	B.Sc (Bio Technology, Chemistry, Computer Applications)	Medium Course
	Semester 07	B.Sc (Bio Technology, Chemistry, Computer Applications)	Medium Course
Subtotal			
<input type="checkbox"/> MBA (1)	Semester 01	MBA (Finance)	Large Course
Subtotal			
Total (7)			

Milestone – 06: dashboards

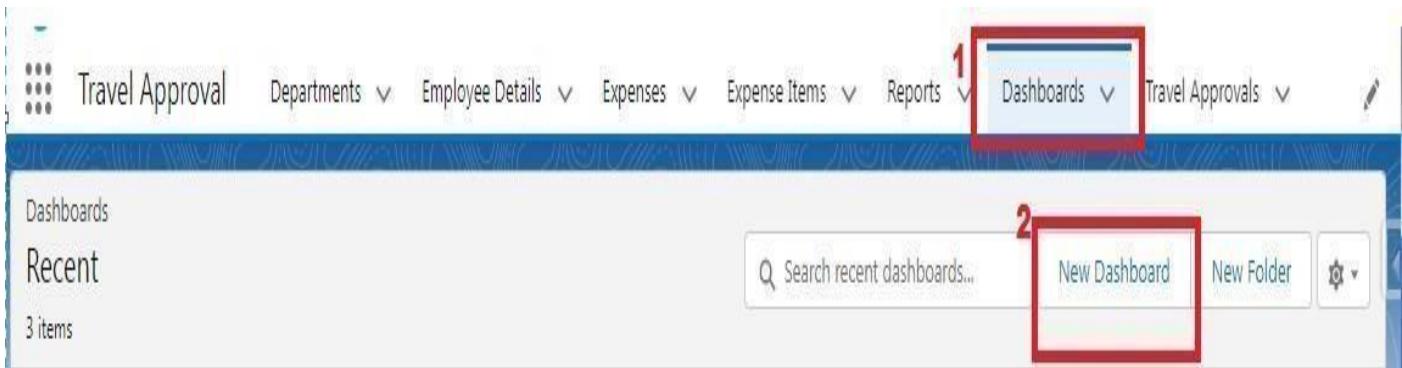
Dashboards

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

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

This screenshot shows the "New Dashboard" creation dialog. It includes fields for Name (Candidate Internal Result Card), Description (3), and Folder (Private Dashboards). A "Select Folder" button is also present. At the bottom are "Cancel" and "Create" buttons, with the "Create" button highlighted with a red box labeled 4.

The screenshot shows the application's top navigation bar and a toolbar below it. The toolbar includes a search bar, filter, save, and done buttons. A prominent blue button labeled "+ Component" is highlighted with a red box labeled 5.

Add Component

Report: Candidate Internal Result Report | X

Display As: 7

X-Axis: Course: Course Name

Preview: Candidate Internal Result Report

Record Count: BCA (1), BSc (3), Btech (2), MBA (1)

View Report (Candidate Internal Result Report)

Cancel Add 8

This screenshot shows the "Add Component" dialog. It displays a report titled "Candidate Internal Result Report" and allows selecting a chart type from a grid. The preview shows a bar chart with data: BCA (1), BSc (3), Btech (2), and MBA (1). At the bottom are "Cancel" and "Add" buttons, with the "Add" button highlighted with a red box labeled 8.

View Dashboard

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

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	REDDY BHAVANA V R	9/10/2023, 7:24 pm	
Created by Me	Propertys with Customer Name Report		Private Dashboards		8/4/2023, 12:58 pm	
Private Dashboards	Job application wth candidate name		Private Dashboards		8/4/2023, 7:14 pm	
All Dashboards	Events with Attendees		Private Dashboards		6/4/2023, 5:23 pm	
FOLDERS	Candidate Internal Result Card		Private Dashboards		9/4/2023, 8:00 pm	
All Folders	Travel Approval		Private Dashboards		3/4/2023, 12:58 pm	
	Employee Travel detail		Private Dashboards		8/4/2023, 12:22 pm	



Search...

Candidate Internal ...

Semesters ▾

Candidates ▾

Course Details ▾

Lecturer Details ▾

Internal resultss ▾

Reports ▾

Dashboards ▾

Candidate Internal Result Card



THEEND

