

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.

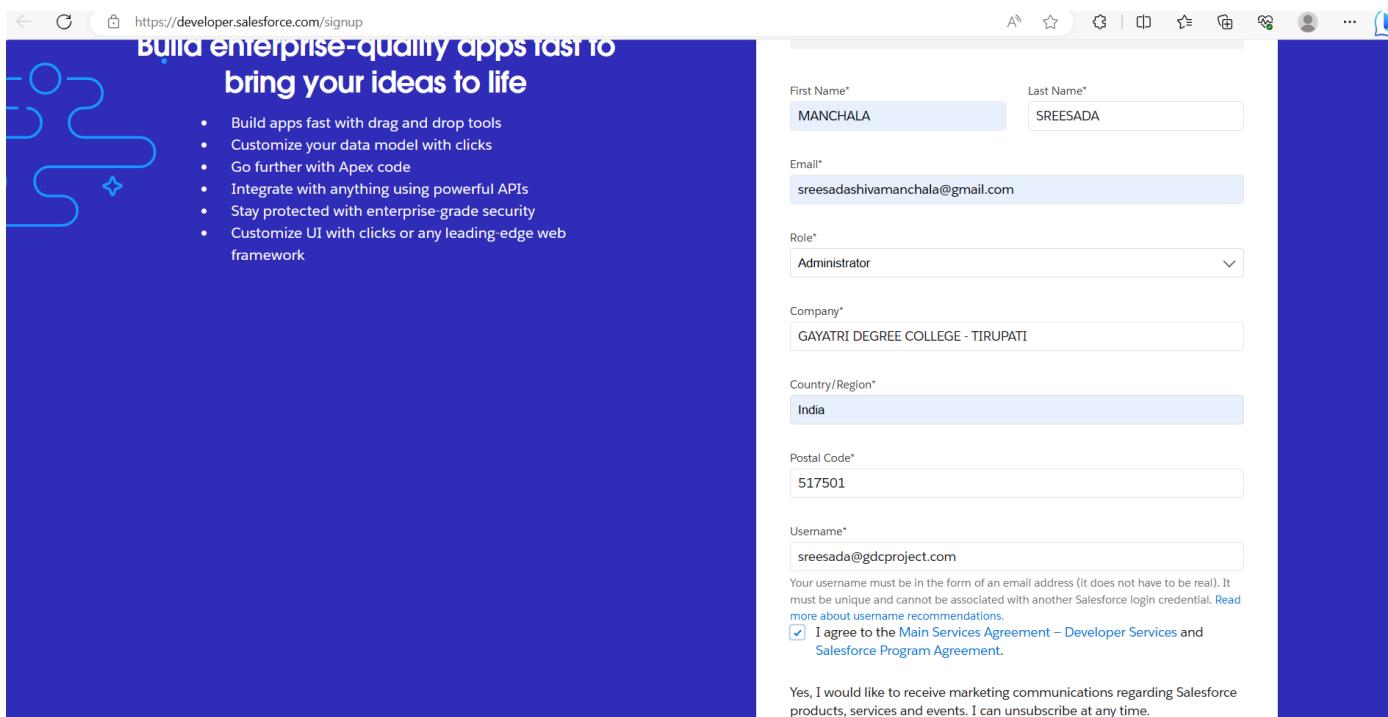
Milestone 01: Create Salesforce Org Go

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 – MANCHALA SREESADA
2. Email –sreesadashivamanchala@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501



The screenshot shows the Salesforce developer sign-up page at https://developer.salesforce.com/signup. The page has a dark blue header with the text "Build enterprise-quality apps fast to bring your ideas to life". Below the header, there is a list of features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The main form is on the right, with fields for First Name (MANCHALA), Last Name (SREESADA), Email (sreesadashivamanchala@gmail.com), Role (Administrator), Company (GAYATRI DEGREE COLLEGE - TIRUPATI), Country/Region (India), and Postal Code (517501). There is also a field for Username (sreesada@gdcproject.com) with a note about uniqueness and a checkbox for agreeing to the Main Services Agreement and Salesforce Program Agreement. At the bottom, there is a checkbox for marketing communications and a link to unsubscribe.

First Name*
MANCHALA

Last Name*
SREESADA

Email*
sreesadashivamanchala@gmail.com

Role*
Administrator

Company*
GAYATRI DEGREE COLLEGE - TIRUPATI

Country/Region*
India

Postal Code*
517501

Username*
sreesada@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](#).

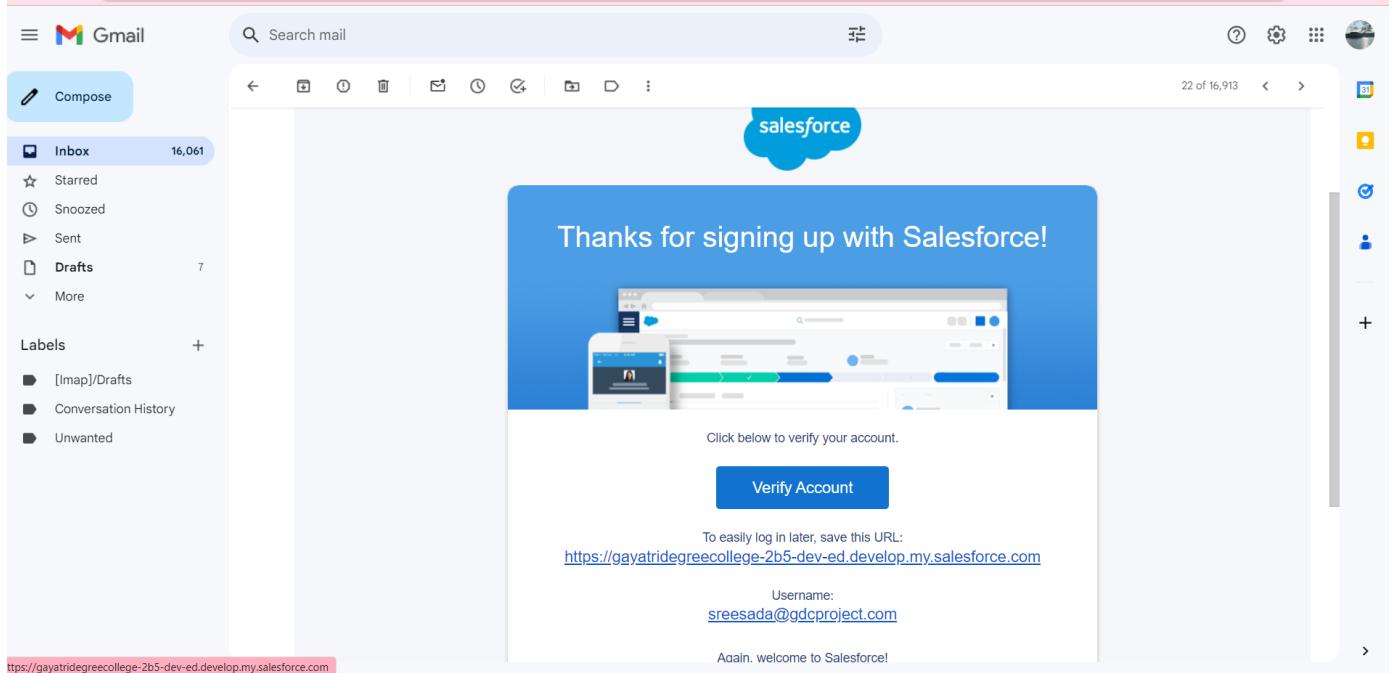
Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time.

7. Username:sreesada@gdcproject.com

8.

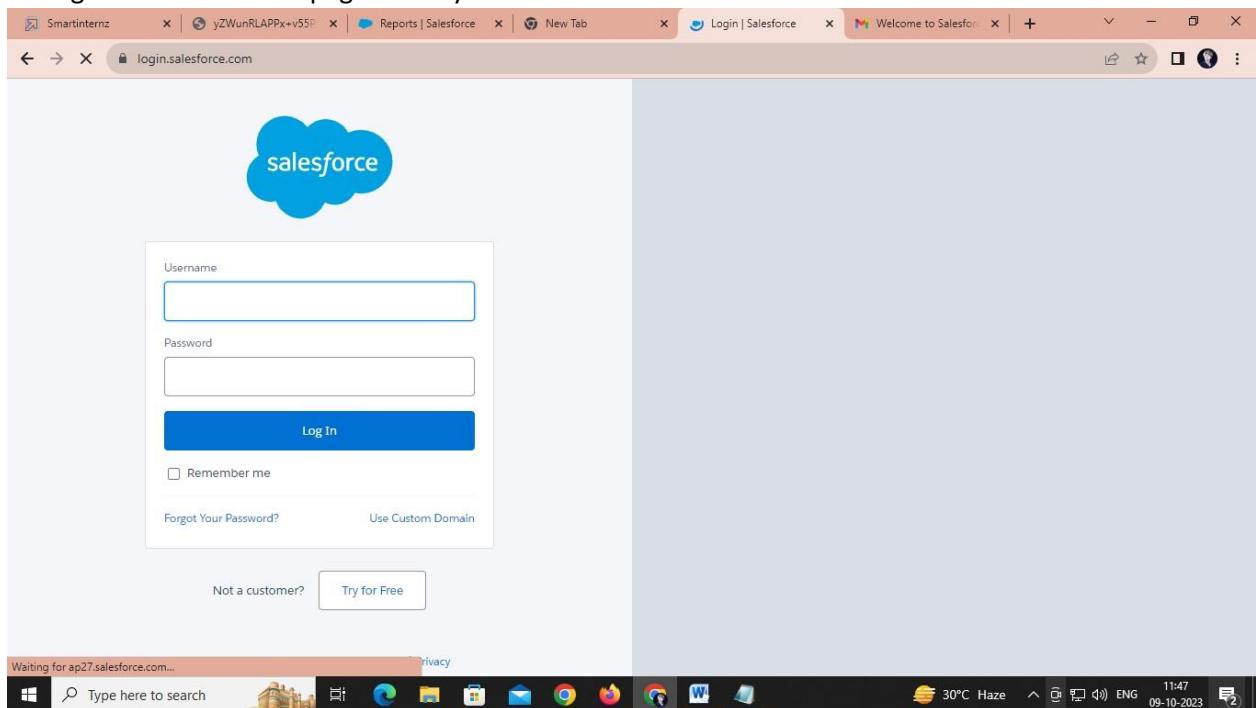
Account Activation

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

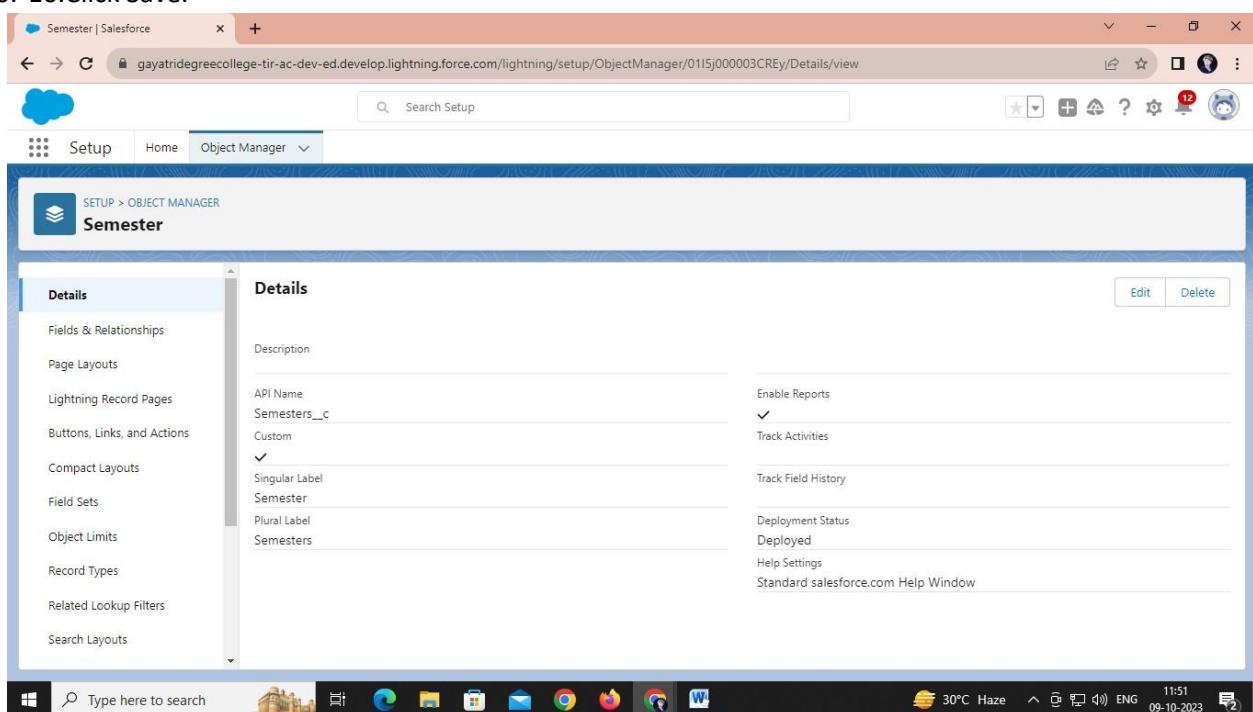
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



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.

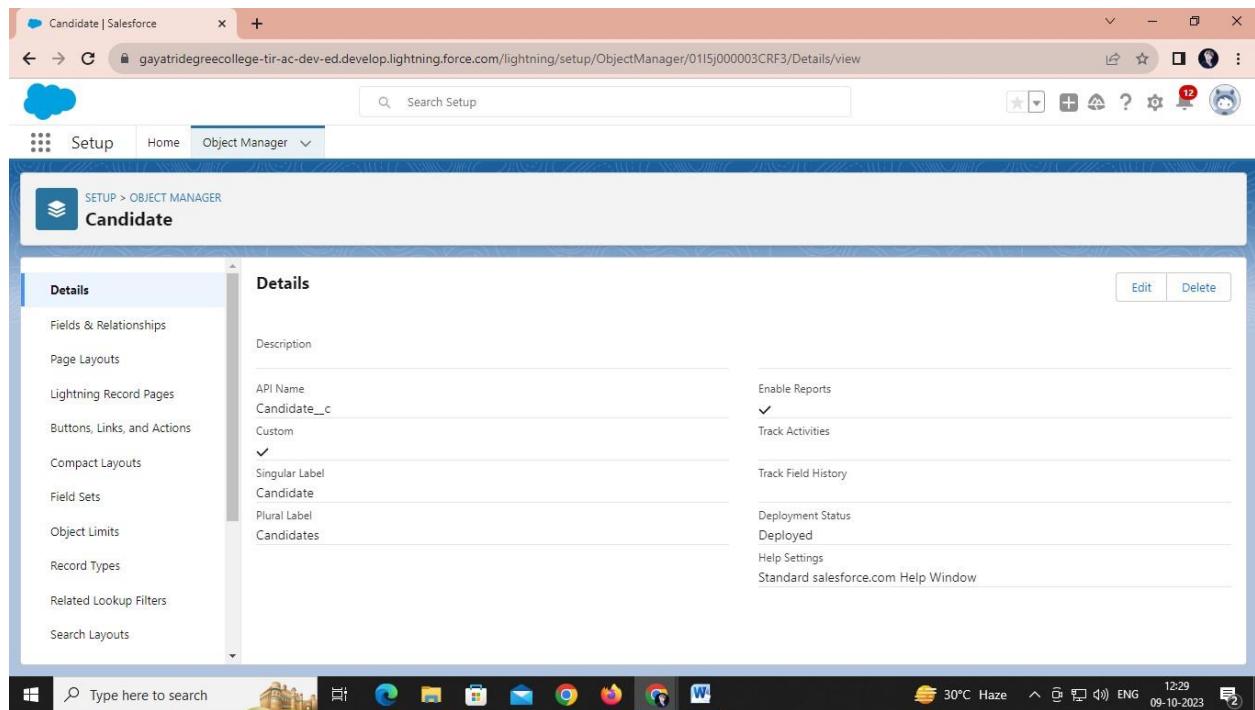


Object – Candidate

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



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 URL <https://gayatridegreecollege-tir-ac-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000003CRF8/Details/view>. The page title is 'Course Details'. The left sidebar lists various object 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, and Search Layouts. The main content area is titled 'Details' and shows the following configuration for the 'Course Details' object:

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

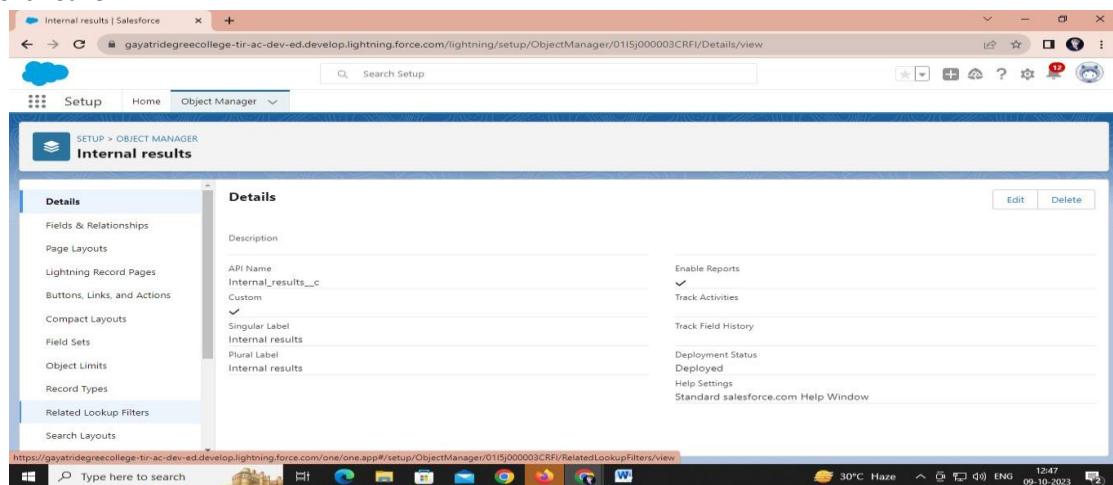
Object – Lecturer Details

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.

The screenshot shows the Salesforce Setup interface with the URL <https://gayatridegreecollege-tir-ac-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000003CRFD/Details/view>. The page title is 'Lecturer Details'. The left sidebar lists various object 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, and Search Layouts. The main content area is titled 'Details' and shows the following configuration for the 'Lecturer Details' object:

Description	API Name: Lecturer_Details_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Lecturer Details
Plural Label	Lecturer Details
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input type="checkbox"/>
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.

SETUP **Tabs**

Custom Tabs

Help for this Page 

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.

Custom Object Tabs		New What Is This?	Description
Action	Label	Tab Style	
Edit Del	Candidates	 Apple	
Edit Del	Course Details	 Bridge	
Edit Del	Internal results	 Train	
Edit Del	Lecturer Details	 Camera	
Edit Del	Semesters	 Globe	

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, Internal 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

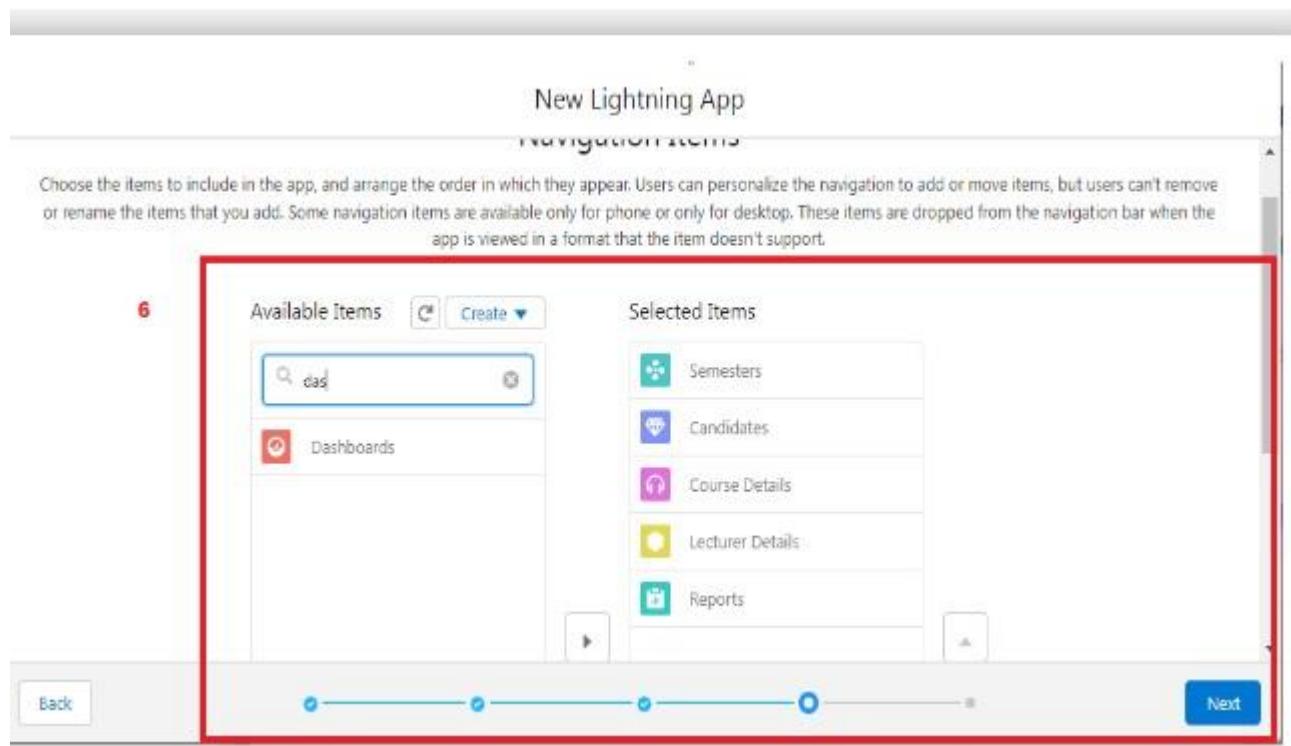
Step 1: In the Setup Home, search for "app man".

Step 2: In the Lightning Experience App Manager, click "New Lightning App".

Step 3: Fill out the "App Details & Branding" form:

- App Name:** Candidate Internal Result Card
- Developer Name:** Candidate_Internal_Result_Card
- Description:** Candidate Internal Result Card
- Image:** (Upload button)
- Primary Color Hex:** #0070D2

Then click "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 Setup interface. A red box labeled '1' highlights the gear icon 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 'Lecturer Details' row in the list of objects. The list includes columns for Label, API Name, Type, Description, Last Modified, and Deployed. The 'Label' column shows 'Lecturer Details', 'API Name' shows 'Lecturer_Detail__c', 'Type' shows 'Custom Object', and 'Last Modified' shows '06/04/2023'.

The screenshot shows the 'Fields & Relationships' screen for the 'Lecturer Details' object. A red box labeled '4' highlights the 'Fields & Relationships' tab in the sidebar. A red box labeled '5' highlights the 'New' button at the top of the list. The list table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. It shows two fields: 'Address' (Field Name: Address_c, Data Type: Text(50)) and 'Created By' (Field Name: CreatedBy_id, Data Type: Lookups).



Step 2. Enter the details

Step 2 of 4

Previous **Next** Cancel

7

Field Label **Lecturer Role** 8

Length **40** 9

Field Name **Lecturer_Role** 8

Description:

Help Text:

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Lecturer Details

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Lecturer Details Custom Field **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		Object Name	Data Type
Field Label	Lecturer Role	Lecturer Details	Text
Field Name	Lecturer_Role		
API Name	Lecturer_Role_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MANCHALA SREESADA, 10/10/2023, 8:32 am	Modified By	MANCHALA SREESADA, 10/10/2023, 8:32 am

General Options

- Required
- Unique
- Case Sensitive
- External ID
- Default Value

Text Options

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

- Select the lookup as the Data Type, then click Next.
- In related select Semester 8. For Field Label Semester Name, enter.
- Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Lecturer Details' row in the main table, specifically the 'API Name' column which contains 'Lecturer_Details__c'. A third red box highlights the 'New' button in the top right corner of the table header.

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

The screenshot shows the 'Fields & Relationships' section of the Object Manager. A red box highlights the 'Fields & Relationships' tab in the left sidebar. Another red box highlights the 'New' button in the top right of the table header. The table lists two fields: 'Address' (Text(50)) and 'Created By' (Lookup(User)).

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

Lookup Relationship (highlighted with a red box) provides a description of how it creates a relationship between the object and another object, allowing users to select values from a dropdown list.

Master-Detail Relationship provides a description of how it creates a parent-child relationship between the object and another object, where the relationship field is required on all detail records and ownership is determined by the master record.

The screenshot shows the 'Step 2. Choose the related object' dialog. A red box highlights the 'Related To' dropdown menu, which has 'Semester' selected. The dialog also includes 'Previous', 'Next', and 'Cancel' buttons at the bottom.

Step 2
Step 2

Select the other object to which this object is related.

Related To: Semester

The screenshot shows the Salesforce Object Manager interface. A new field is being created with the following details:

- Field Label:** Semester Name
- Field Name:** Semester_Name
- Description:** (empty)
- Help Text:** (empty)

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

The screenshot shows the Salesforce Setup page for the 'Semester' object. The 'Fields & Relationships' tab is selected. The 'Semester Name' field is displayed with the following configuration:

- Field Label:** Semester Name
- Data Type:** Text(80)
- Field Name:** Semester_Name
- 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 screenshot shows the Salesforce Object Manager interface. Step 1 highlights the gear icon in the top right corner. Step 2 highlights the 'Object Manager' tab in the top navigation bar. Step 3 highlights the 'Lecturer_Details__c' object in the list. Step 4 highlights the 'Fields & Relationships' link in the left sidebar. Step 5 highlights the 'New' button in the top right of the Fields & Relationships list. Step 6 highlights the 'Field Label' field with 'Duration'. Step 7 highlights the 'Help Text' field with '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.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. A red box labeled '2' highlights the search bar with 'lect'. A red box labeled '3' highlights the 'Lecturer Details' row in the table below, which includes the API name 'Lecturer_Details__c' and type 'Custom Object'. The status bar at the bottom right shows a checkmark and a dropdown menu.

The screenshot shows the 'Fields & Relationships' section of the Object Manager. 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 of the list area. The table lists two fields: 'Address' (Text(50)) and 'Created By' (Lookup(1)).

The screenshot shows the 'Data Type' selection dialog. A red box labeled '6' highlights the 'Formula' radio button. The dialog also includes sections for 'None Selected' and 'Auto Number'.

The screenshot shows the 'Formula Editor' dialog. A red box labeled '7' highlights the 'Field Label' input field containing 'Candidate Roll Number'. A red box labeled '8' highlights the 'Field Name' input field containing 'Candidate_Roll_Number'. Below these are checkboxes for 'Auto add to custom report types' and 'Add this field to existing custom report types that contain this entity'. The 'Formula Return Type' section is expanded, showing various options like Checkbox, Currency, Date, etc., with a red box highlighting the 'Text' option.

10

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

- Click New
- Select the Auto Number as the Data Type, then click Next.
- For Field Label Candidate enter Roll Number.
- Give a display format
- Click Next, Next, then Save & New.

Setup Home Object Manager lect Schema Builder Create

Object Manager

1 Items Sorted by Label

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

Details Fields & Relationships New Deleted Fields Field Dependencies Set History Tracking

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedById	Lookup(1)		

None Selected Select one of the data types below:

Auto Number A system-generated sequence number that uses a display format you define. This 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.

Rolling 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

Step 2 of 4 Previous Next Cancel

Step 2. Enter the details

Field Label	<input type="text" value="Candidate Roll Number"/>	7
Display Format	<input type="text" value="CAD-(000)"/>	Example: A-(0000) What is This?
Starting Number	<input type="text" value="1"/>	8
Field Name	<input type="text" value="Candidate_Roll_Number"/>	9
Description	<input type="text"/>	
Help Text	<input type="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.
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.

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	1. User	u1	utkarsh2@vanshiv.com	Operator_1	<input checked="" type="checkbox"/>	operator
Edit	2. User	u2	utkarsh3@vanshiv.com	Operator_2	<input checked="" type="checkbox"/>	operator
Edit	Chatter Expert	Chatter	chatty.00d2w00000rs8akeaj.muirokjfxf1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Technologies: Vanshiv	YTech	vehicledemo@vanshiv.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Teddy John	j.ted	utkarsh1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

User Edit

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:

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 with the following steps highlighted:

3. In the top navigation bar, the "Course Details" tab is selected and highlighted with a red box.
4. In the top right corner of the main content area, the "New" button is highlighted with a red box.
5. In the "Information" section of the "New Course Details" form, the "Course Name" field (containing "MBA") and the "Duration" field (containing "2") are highlighted with a red box.
6. In the bottom right corner of the "New Course Details" form, the "Save" button is highlighted with a red box.

The interface includes standard Salesforce navigation elements like the App Launcher, search bar, and various tabs like Semesters, Candidates, Lecturer Details, Reports, and Dashboards. The "Recently Viewed" section also displays "Course Details".

The screenshot shows the Salesforce interface for the 'Candidate Internal ...' application. The top navigation bar includes links for Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. The 'Course Details' tab is currently selected. A sidebar on the left titled 'Recently Viewed' lists four items: 'Course Details Name' (with sub-options for 'MBA (Marketing)', 'Btech', 'BSc', and 'BCA'). The main content area displays a table with columns for 'Course Name', 'Duration', and 'Created Date'. The table contains four rows corresponding to the items in the sidebar.

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 home page. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar at the top left shows 'Candidate Internal Result Card'. Below the search bar, there's a section for 'Apps' with a button labeled 'Candidate Internal Result Card'. The main content area features three decorative cards: one with a robot, one with a smartphone, and one with a tree. At the bottom, the navigation bar includes links for Candidate Internal ..., Semesters, Candidates, Course Details (which is highlighted with a red box), Lecturer Details, Reports, and Dashboards. The 'Course Details' section displays a table with columns for 'Course Name', 'Duration', and 'Created Date'. The table contains four rows, each with a checkbox next to the course name: 'BCA', 'BSc', 'Btech', and 'MBA'. The row for 'MBA' is also highlighted with a red box.

The screenshot shows a CRM application interface. At the top, there's a navigation bar with links like 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. Below the navigation is a search bar with placeholder text 'Search...'. The main content area displays a 'Course Details' card for 'MBA (Marketing)'. The card includes fields for 'Course Details Name' (MBA (Marketing)), 'Owner' (MANCHALA SREESADA), 'Course Name' (MBA), 'Duration' (2.00), 'Created By' (MANCHALA SREESADA, 10/10/2023, 8:49 am), and 'Last Modified By' (MANCHALA SREESADA, 11/10/2023, 12:54 am). There are tabs for 'Related' and 'Details'.

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 screenshot shows the CRM application with the 'Candidate Internal Result Card' app selected in the app launcher. The 'Course Details' tab is selected in the navigation bar. The main list view shows four items: 1. BCA, Duration 3.00, Created Date 09/04/2023, 7:39 pm; 2. BSc, Duration 3.00, Created Date 09/04/2023, 7:39 pm; 3. BTech, Duration 4.00, Created Date 09/04/2023, 7:39 pm; 4. MBA, Duration 2.00, Created Date 09/04/2023, 7:38 pm. The 'Delete' button for the MBA record is highlighted with a red box and labeled '5'. A context menu for the MBA record is open, with the 'Delete' option highlighted with a red box and labeled 'Delete'.

The screenshot shows a Salesforce interface with a navigation bar at the top. The 'Course Details' tab is selected. Below the navigation bar, there's a 'Recently Viewed' section with a dropdown arrow. A search bar with placeholder text 'Search...' is located above a list of items. The list contains four items, each with a checkbox and a name: 1. MBA (Marketing), 2. BTech, 3. BSc, and 4. BCA. To the right of the list is a toolbar with buttons for 'New', 'Import', 'Change Owner', and other actions. A context menu is open over the fourth item ('BCA'), showing options like 'Edit', 'Delete', and 'Change Owner'. At the bottom left, there's a small note: 'javascript:void(0);'.

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 screenshots illustrate the steps to create a new report. In the first screenshot, the 'Setup' icon is highlighted. In the second, the 'Reports' dropdown and 'New Report' button are highlighted. In the third, the 'Save & Run' button is highlighted, along with a note to refresh the preview.

REPORT Candidate Internal Result Report Semesters with Course

To see the latest edits, refresh the preview. Refresh 7

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

1. On the report builder page, locate the "Fields" pane on the left-hand side.
2. Find the field for which you want to create a bucket field and drag it to the report preview section.
3. Click on the field in the report preview to open the field properties.
4. In the field properties, locate the "Summarize" option and click the drop-down arrow.
5. Select "Bucket Field" from the available options.
6. In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.
7. Click "OK" or "Apply" to save the bucket field settings.
8. Customize the report layout and add any additional fields or filters as needed.

- Once you are satisfied with the report setup, click "Save" to save the report.

The screenshot shows the 'Edit Bucket Column' dialog box. The 'Field' is set to 'Course: Duration' and the 'Bucket Name' is 'Duration'. The 'Range' column contains three rows: ' \leq ' with value '1', ' > 1 to' with value '2', and ' $>$ ' with value '2'. The 'Bucket' column contains three corresponding entries: 'Small Course', 'Medium Course', and 'Large Course'. A checkbox at the bottom left is checked, labeled 'Treat empty Course: Duration values in the report as zeros.'. At the bottom right are 'Cancel' and 'Apply' buttons. To the right of the dialog, there's a preview section showing a chart with three categories: 'Large Course' (blue), 'Medium Course' (black), and 'Small Course' (green).

Save Report

The screenshot shows the 'Save Report' dialog box. It has fields for 'Report Name' (Candidate Internal Result Report), 'Report Unique Name' (Candidate_Internal_Result_Report_bky), and a 'Report Description' text area. At the bottom right are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box and labeled '10'.

View Report

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

The screenshot shows the App Launcher interface. The 'Candidate Internal Result Card' app is selected and highlighted by a red box and labeled '2'. The 'Setup' tab is also highlighted by a red box and labeled '1'. The search bar at the top contains the text 'Candidate Internal Result Card'. On the right, there are several app icons including Home, Object Manager, Create, and others.

The screenshot shows a software application window with a blue header bar. In the top left corner is a blue cloud icon. To its right are several menu items: 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Reports' (which is highlighted with a red box), and 'Dashboards'. On the far right of the header are various icons for search, refresh, and help.

The main area is titled 'Recent' and shows a list of '9 items'. On the left, there's a sidebar with a tree view under 'REPORTS': 'Recent' (selected and highlighted with a blue background), 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The main list has columns: 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The first four rows are standard reports, while the fifth row, 'Candidate Internal Result Report', has its 'Report Name' column highlighted with a red box and contains the number '4' in its 'Description' column.

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	4 job application with candidate name	Private Reports		9/4/2023, 7:57 pm	
		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 ↑	<input type="checkbox"/> Semester: Semester Name ↓	<input type="checkbox"/> Course: Course Details Name	<input 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, 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 top navigation bar of the Travel Approval application. The menu items include Travel Approval, Departments, Employee Details, Expenses, Expense Items, Reports, Dashboards (highlighted with a red box), and Travel Approvals. Below the menu is a search bar labeled "Search recent dashboards..." with a magnifying glass icon. To the right of the search bar are buttons for "New Dashboard" (highlighted with a red box) and "New Folder". A gear icon and a refresh icon are also present.

New Dashboard

* Name
Candidate Internal Result Card |

Description 3

Folder
Private Dashboards Select Folder

Cancel Create 4

This screenshot shows the "New Dashboard" dialog box. It has fields for "Name" (Candidate Internal Result Card), "Description" (empty), and "Folder" (Private Dashboards). At the bottom are "Cancel" and "Create" buttons, with the "Create" button highlighted with a red box and a red number "4" above it.

The screenshot shows the "Employee Travel detail" page. The top navigation bar includes Travel Approval, Departments, Employee Details, Expenses, Expense Items, Reports, Dashboards (highlighted with a red box), and Travel Approvals. Below the navigation is a search bar and a toolbar with various icons. A prominent blue button labeled "+ Component" is highlighted with a red box and a red number "5".

Add Component

Report
Candidate Internal Result Report X
 Use chart settings from report 6

Display As
7 123 Bar Chart Line Chart Pie Chart Map Table

X-Axis
Course: Course Name

Preview
Candidate Internal Result Report
RecordCount
View Report (Candidate Internal Result Report)

Cancel Add 8

This screenshot shows the "Add Component" dialog box. It displays a preview of a bar chart titled "Candidate Internal Result Report" with data for four courses: BCA (1), BSc (3), Btech (2), and MBA (1). The "Display As" section shows various chart and table options, with the "Bar Chart" option highlighted with a red box and a red number "7". The "Add" button at the bottom is also highlighted with a red box and a red number "8".

Screenshot of the Candidate Internal Result Card dashboard in Salesforce. The dashboard shows a table with one item: 'Candidate Internal Result Card' in the 'Recent' folder, created by Manchala Sreesada on 10/10/2023 at 9:06 am.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	MANCHALA SREESADA	10/10/2023, 9:06 am	

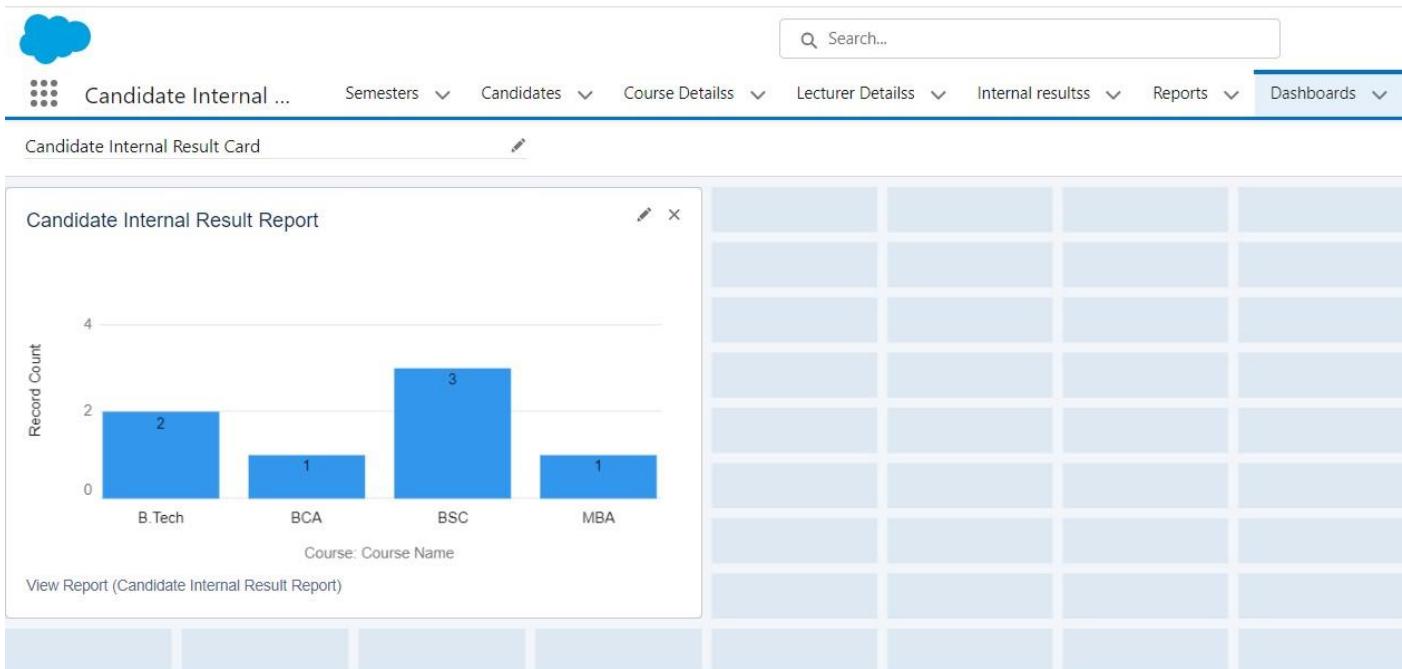
View Dashboard

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. The 'Candidate Internal Result Card' app is selected and highlighted with a red box. The app icon is also highlighted with a red box.

Candidate Internal ... Semesters Candidates Course Details Lecturer Details Reports Dashboards 3

Dashboards		Recent					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						⋮



THEEND

