

PROJECT REPORT

Implementing CRM For Result Tracking Of A Candidate With Internal Marks-(ADMINISTRATION) - (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.

METHOD :1

Creating Developer Org

Creating a developer org in salesforce.

- 1) Go to developers.salesforce.com/Signup
- 2) Click on sign up.
- 3) On the sign-up form, enter the following details:
 - 1) First name & Last name: K.NANDINI & KUMAR
 - 2) Email : nandinisalesforce@gmail.com
 - 3) Role: Administration
- 4) Company: GAYATRI DEGREE COLLEGE TIRUPATI
- 5) County: India
- 6) Postal Code: 517501
- 7) Username: nandinisalesforce2023@gdcproject.com

1 (1) WhatsApp | Login | Salesforce | Developer Edition Signup | Sales | +

developer.salesforce.com/signup

The screenshot shows a web browser window with the URL developer.salesforce.com/signup. The page has a blue header with the Salesforce logo and the text "Sign up for your Salesforce Developer Edition". Below the header, there is a section titled "Build enterprise-quality apps fast to bring your ideas to life" with 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
- Customize UI with clicks or any leading-edge web framework

On the right side of the page, there is a form for signing up, which includes fields for First Name*, Last Name*, Email*, Role*, and Company*. The bottom of the page shows a toolbar with various icons and system status indicators.

Build enterprise-quality apps fast to bring your ideas to life

- 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
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*

Last Name*

Email*

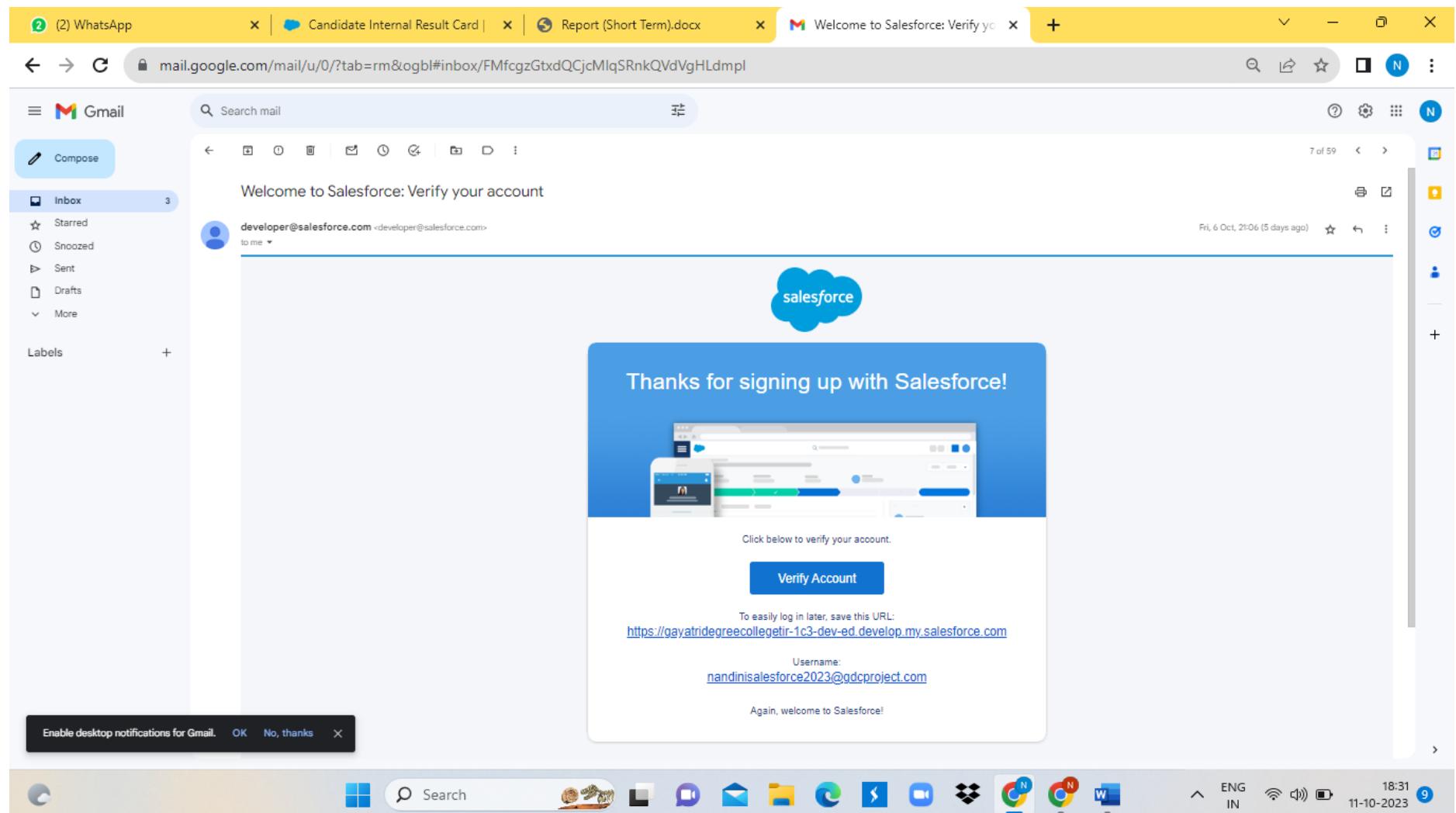
Role*

Company*

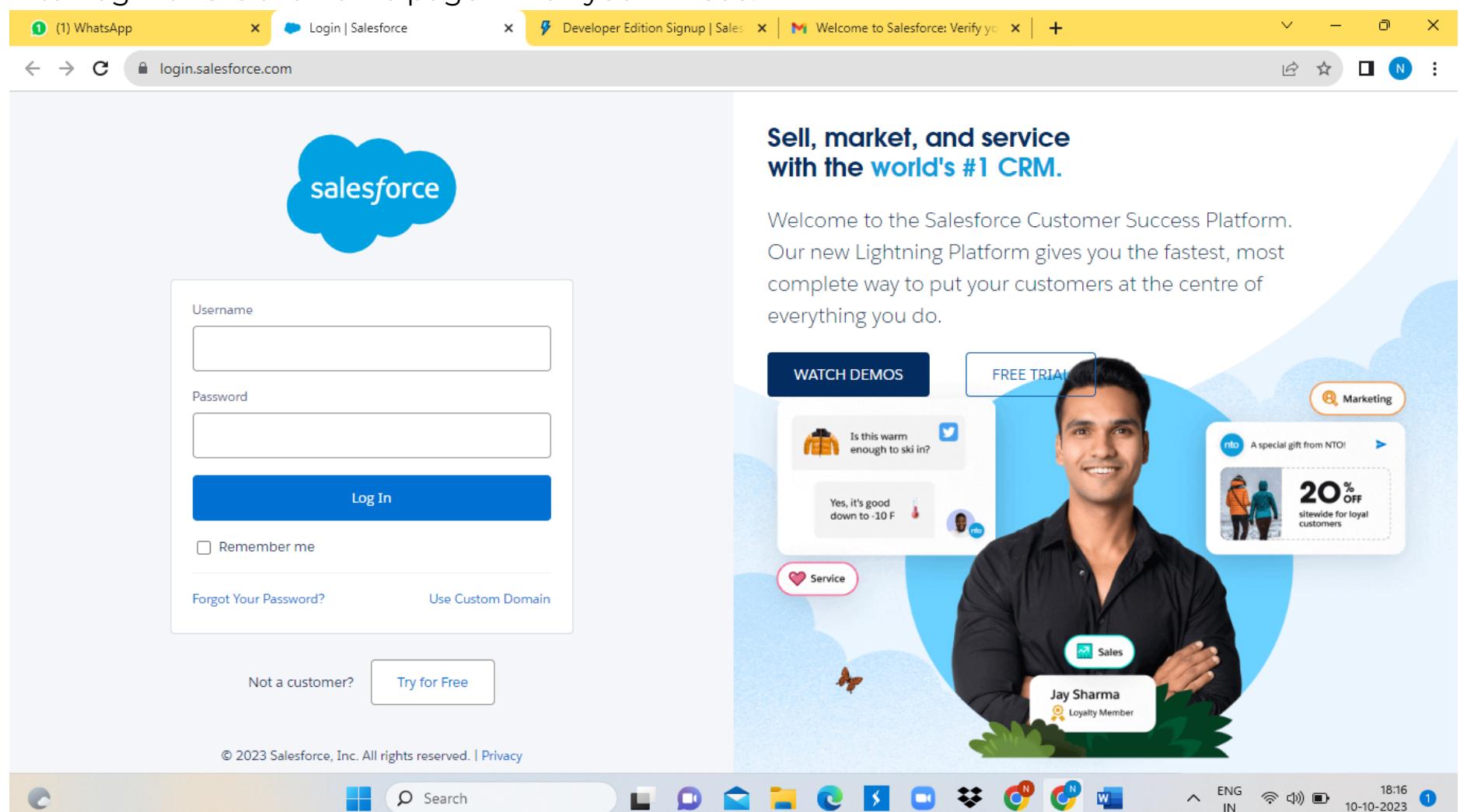
Search ENG IN 18:05 10-10-2023 7

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,



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

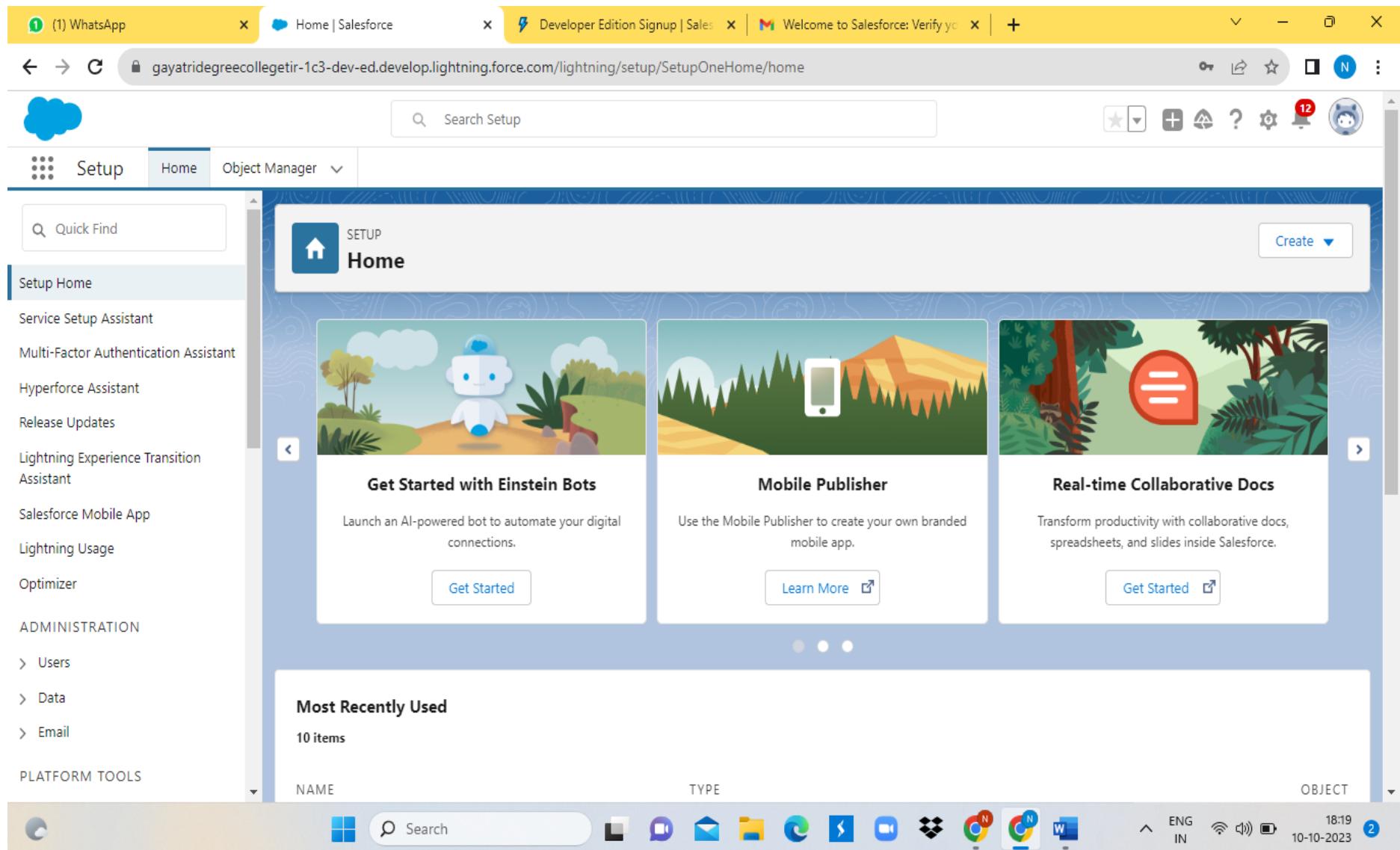


Salesforce Login

<https://login.salesforce.com>

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.



METHOD: 2

Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

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 Dropdown 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 Dropdown 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 – COURSES 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 Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
 5. Label: Course Details
 6. Plural Label: Courses Details
 7. Record Name: Course Details
 8. Check the Allow Reports
 9. Check the Allow Search
 10. Click Save.

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 Dropdown 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: Lecturers Details
 7. Record Name: Lecturer Details
 8. Check the Allow Reports
 9. Check the Allow Search
 10. Click Save.

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 Dropdown 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: Internals results
 7. Record Name: Internal results
 8. Check the Allow Reports
 9. Check the Allow Search
 10. Click Save.

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area is titled "Object Manager" with a subtitle "50+ Items, Sorted by Last Modified". Below this is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Course Details	Course_Details__c	Custom Object		09/10/2023	✓
Lecturer Details	Lecturer_Details__c	Custom Object		09/10/2023	✓
Internal results	Internal_results__c	Custom Object		09/10/2023	✓
Candidate	Candidate__c	Custom Object		09/10/2023	✓
Semester	Semester__c	Custom Object		09/10/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			

At the bottom of the page, there is a toolbar with icons for various applications like Microsoft Word, Excel, and Google Sheets, along with system status indicators.

METHOD : 3

What Is A Tab?

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) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

TAB : SEMESTER

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

TAB: CANDIDATE

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 Candidate.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

TAB – COURSE DETAILS

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 Course Details.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

TAB – LECTURER DETAILS

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 Lecturer Details.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

TAB – INTERNAL RESULTS

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 Internal results.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

Action	Label	Tab Style	Description
Edit Del	Candidates	Books	
Edit Del	Courses Details	Building	
Edit Del	Internals results	Caduceus	
Edit Del	Lecturers Details	Factory	
Edit Del	Semesters	Flag	

METHOD : 4

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 System Administrator and move it to Selected Profiles. Click Save & Finish.



Setup Home Object Manager

Search Setup

New Lightning App New Connected App

App Manager Clone Apps(Beta)

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 Upload

Primary Color Hex
Value #0070D2

Next

New Lightning App

Navigation Items

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.

Available Items 6 Create ▾

das

Dashboards

Selected Items

Semesters
Candidates
Course Details
Lecturer Details
Reports

Back Next

Screenshot of the Salesforce Lightning Experience App Manager interface.

The title bar shows multiple open tabs: WhatsApp (2), App Manager | Salesforce, Developer Edition Signup | Sales..., and Welcome to Salesforce: Verify your email.

The main content area is titled "Lightning Experience App Manager" under the "SETUP" tab.

A search bar at the top right contains the placeholder "Search Setup".

The left sidebar includes a "Setup" icon, "Home" link, "Object Manager" dropdown, and a search bar for "App manager". Below this is a "Apps" section with a "App Manager" link, which is currently selected.

A message in the center says: " Didn't find what you're looking for? Try using Global Search."

The main table displays 22 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The columns are: App Name ↑, Developer Name, Description, Last Modified ..., Ap..., Vi..., and a small icon column.

App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1 All Tabs	AllTabSet		06/10/2023, 8:59 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	06/10/2023, 8:59 pm	Classic	
3 App Launcher	AppLauncher	App Launcher tabs	06/10/2023, 8:59 pm	Classic	
4 Bolt Solutions	LightningBolt	Discover and manage business solutions design...	06/10/2023, 9:01 pm	Lightning	
5 Candidate Internal Result Ca...	Candidate_Internal_Result_Card		09/10/2023, 10:27 am	Lightning	
6 Community	Community	Salesforce CRM Communities	06/10/2023, 8:59 pm	Classic	
7 Content	Content	Salesforce CRM Content	06/10/2023, 8:59 pm	Classic	
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage,...	06/10/2023, 8:59 pm	Lightning	
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	06/10/2023, 8:59 pm	Lightning	
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	06/10/2023, 8:59 pm	Lightning	
11 Marketing	Marketing	Best-in-class on-demand marketing automation	06/10/2023, 8:59 pm	Classic	

The bottom navigation bar includes icons for Home, Object Manager, and various system functions like Search, File, Mail, etc. The status bar shows the date and time: 10-10-2023, 19:08.

METHOD : 5

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 related data.

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

Internal results	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	Lookup(Course)
	Marks	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 image consists of three vertically stacked screenshots from the Salesforce Setup interface:

- Screenshot 1:** Shows the main Setup menu with the "Object Manager" tab selected. A red box highlights the "Object Manager" tab in the top navigation bar, and a red number "1" is in the top right corner of the header.
- Screenshot 2:** Shows the "Object Manager" page for the "Lecturer Details" custom object. A red box highlights the "Lecturer_Details__c" API name, and a red number "3" is below it. The "Fields & Relationships" tab is selected.
- Screenshot 3:** Shows the "Fields & Relationships" configuration screen. A red box highlights the "Text" data type option in the list of field types, and a red number "6" is next to it. The "Field Label" input field contains "Lecturer Role". A red box highlights the "New" button at the top of the list, and a red number "5" is next to it. The "Length" input field contains "40". A red box highlights the "Next Step" button at the bottom right, and a red number "7" is next to it.

Setup Home Object Manager

Lecturer Details

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Details	Course_Details__c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecturer Name	Name	Text(80)		✓
Lecturer Role	Lecturer_Role__c	Text(250)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name__c	Text(250)		

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.

Setup Home Object Manager

Lecturer Details

Object Manager

LABEL API NAME TYPE DESCRIPTION LAST MODIFIED DEPLOYED

Lecturer Details **Lecturer_Details__c** Custom Object 08/04/2023 ✓

Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

Address	Address__c	Text(50)		
Created By	CreatedById	Lookup(User)		

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.

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

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

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

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

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Semester

Field Label: Semester Name
Field Name: Semester Name

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Name	Name	Text(80)		✓
Candidate Roll Number	Candidate_Roll_Number_c	Auto Number		✓
Created By	CreatedBy	Lookup(User)		✓
Last Modified By	LastModifiedBy	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name_c	Lookup(Semester)		✓

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

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

Let's create a Number field on Course Details object

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

The screenshot shows the Salesforce Object Manager interface. Step 1 highlights the gear icon in the top right. Step 2 highlights the 'Object Manager' tab in the top navigation bar. Step 3 highlights the 'Lecturer Details' row 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 screen. Step 6 highlights the 'Field Label' input field containing 'Duration'. Step 7 highlights the 'Help Text' input field containing 'Enter Course duration value in Years'.

Now Let's create a Formula field on Internal Results object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Internal results.
4. Select Fields & Relationships from the left navigation.
5. Click New
6. Select the Formula as the Data Type, then click Next.
7. Give field label Candidate Roll Number
8. Select formula return type text, Click Next
9. Click Insert Field
10. Create and insert formula Candidate.r.Candidate_Roll_Number__c, and then click Insert.
11. Click Next, Next, then Save.

The screenshot shows the Salesforce Object Manager interface. Step 1 highlights the gear icon in the top right. Step 2 highlights the 'Object Manager' tab in the top navigation bar. Step 3 highlights the 'Lecturer Details' row in the list.

Fields & Relationships

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

Data Type

- None Selected
- Auto Number
- Formula

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

Field Label: Candidate Roll Number 7

Field Name: Candidate_Roll_Number 8

Formula Return Type: Text 9

Auto add to custom report type: Add this field to existing custom report types that contain this entity 10

Example: [Full Name] + [LastName] & ", " & [FirstName] 9

Simple Formula Advanced Formula 10

Insert Field 9

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, Insert Selected Function

Insert Field 10

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

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

You have selected: Candidate__r.Candidate_Roll_Number__c

Type: Auto Number

API Name: Candidate__r.Candidate_Roll_Number__c

Insert 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
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. Step 1 highlights the 'Object Manager' tab in the top navigation bar. Step 2 highlights the search bar with 'lect'. Step 3 highlights the 'Lecturer_Details_c' row in the list. Step 4 highlights the 'Fields & Relationships' tab. Step 5 highlights the 'New' button. Step 6 highlights the 'Auto Number' radio button. Step 7 highlights the 'Field Label' input field with 'Candidate Roll Number'. Step 8 highlights the 'Display Format' input field with 'CAD-(000)'. Step 9 highlights the 'Next' button.

Step	Action
1	Object Manager tab
2	Search bar: lect
3	Lecturer_Details_c row
4	Fields & Relationships tab
5	New button
6	Auto Number radio button selected
7	Field Label: Candidate Roll Number
8	Display Format: CAD-(000)
9	Next button

METHOD: 6

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

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. The left sidebar is collapsed, and the main area displays the 'All Users' page under the 'Users' section of the 'User Management Settings' category. The 'New User' button is highlighted with a red box. The 'General Information' section of the 'User Edit' dialog is also highlighted with a red box, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, and Department. The 'Role' dropdown, 'User License' dropdown set to 'Salesforce', 'Profile' dropdown set to 'Standard User', and the 'Active' checkbox are also highlighted with a red box. Red numbers 1 through 6 are overlaid on the interface to correspond with the steps in the list above.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar has 'Users' expanded. The main area shows a table of users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5g00000l7tpneav.gzwngvijoxom@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	NANDINI_KUMAR	KNAND	nandinisalesforce2023@gdcproject.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Teacher_Class	c.tea	nandinisalesforce2023@gmail.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5g00000l7tpneav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5g00000l7tpneav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

METHOD: 7

User Adoption

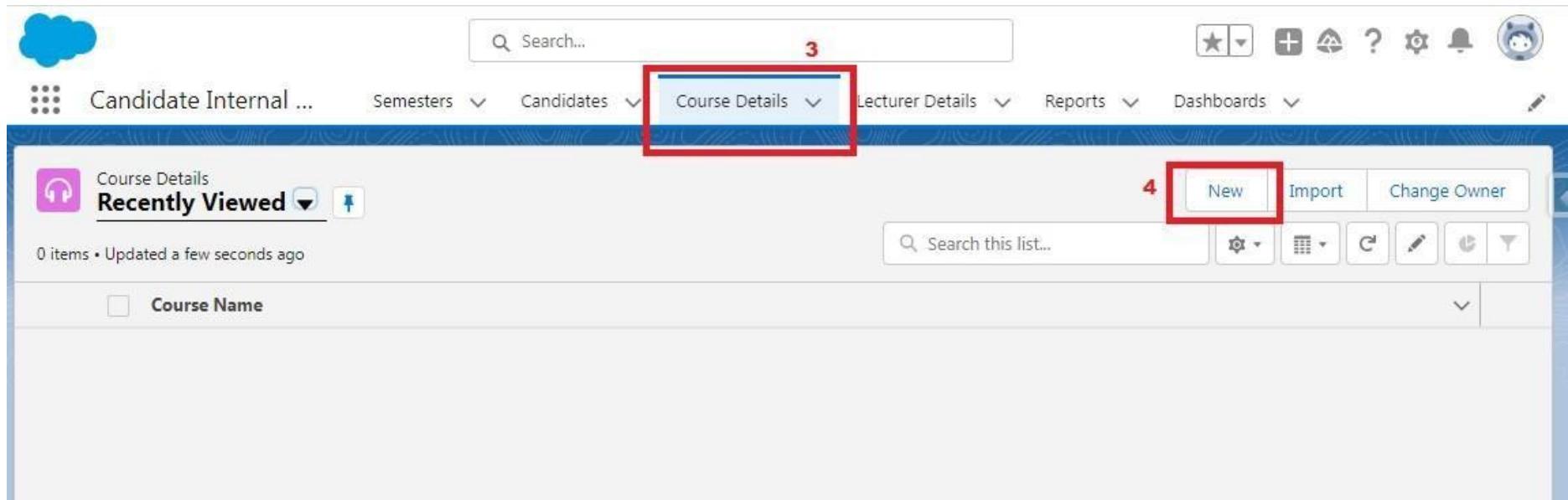
Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

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 App Launcher. The 'Candidate Internal Result Card' app is highlighted with a red box and a red number '2' indicating it is the second item in the list. The App Launcher also shows other apps like Home, Recently Viewed, Semesters, and Users.

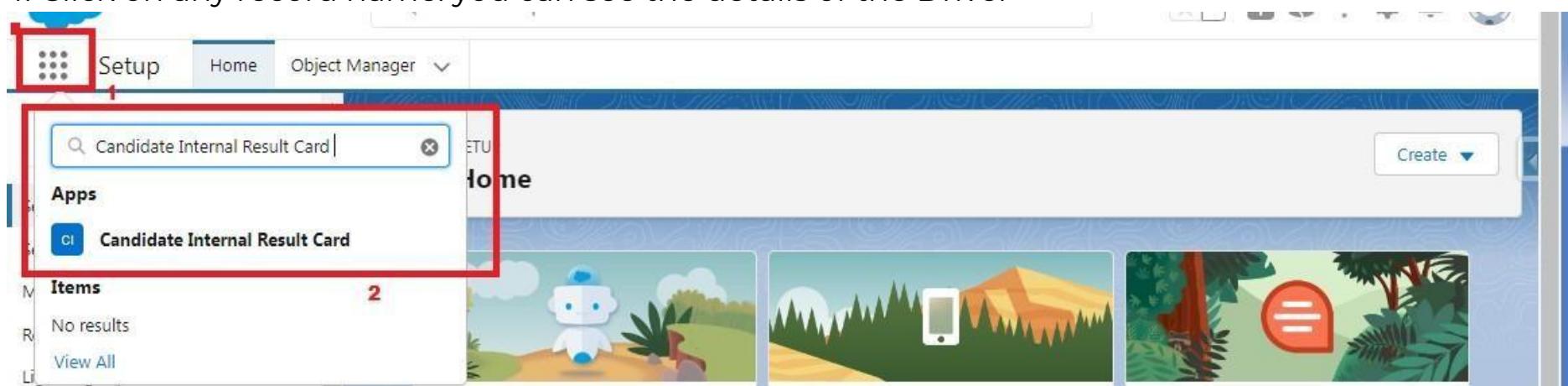


This screenshot displays the 'New Course Details' form. The 'Information' section contains fields for 'Course Name' (MBA) and 'Duration' (2). The 'Owner' field shows 'Vanshiv Technologies'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and a large blue 'Save' button highlighted with a red box. A red number '6' is positioned above the 'Save' button.

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



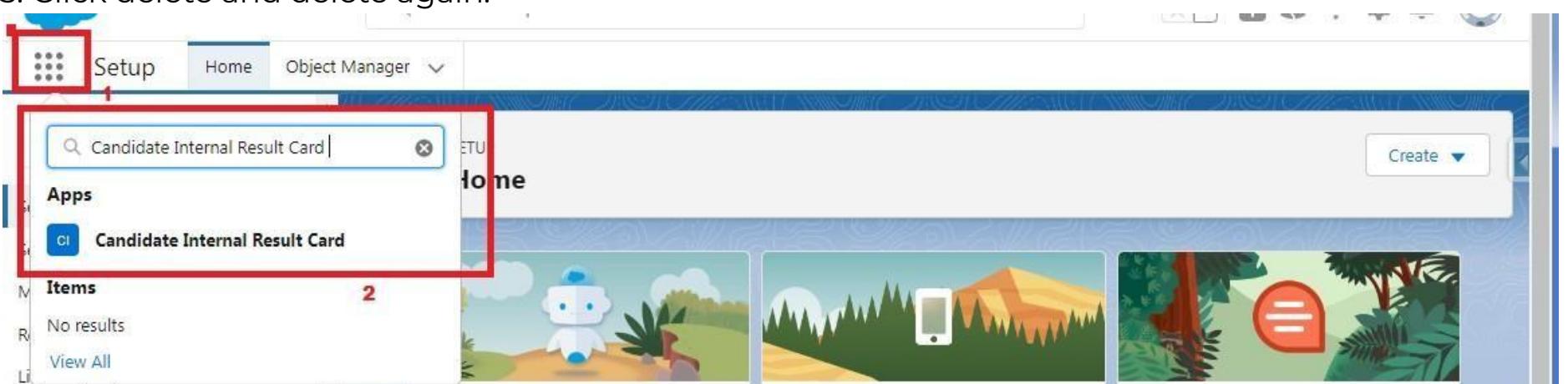
Course Name	Duration	Created Date
BCA	3.00	09/04/2023, 7:39 pm
BSc	3.00	09/04/2023, 7:39 pm
Btech	4.00	09/04/2023, 7:38 pm
MBA	2.00	09/04/2023, 7:38 pm

Course Name
BSc (BCCA)
BSc (MECs)
BSc (MSCs)
B.Com (C.A)

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.



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

Courses Details
Recently Viewed

	Course Name
1	BSc (BCCA)
2	BSc (MECs)
3	BSc (MSCs)
4	B.Com (C.A)

METHOD:8

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 and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

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

NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).

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		
		Cancel Save 10

WhatsApp Candidate Internal Result Report [gayatridgegreecollegegit-1c3-dev-ed.lightning.force.com/lightning/r/Report/00O5g00000ITdyZEAT/view?queryScope=userFolders](http://gayatridegreecollegegit-1c3-dev-ed.lightning.force.com/lightning/r/Report/00O5g00000ITdyZEAT/view?queryScope=userFolders)

Candidate Internal ... Semesters Candidates Courses Details Lecturers Details Internals results Reports Dashboards

Report: Semesters with Course **Candidate Internal Result Report**

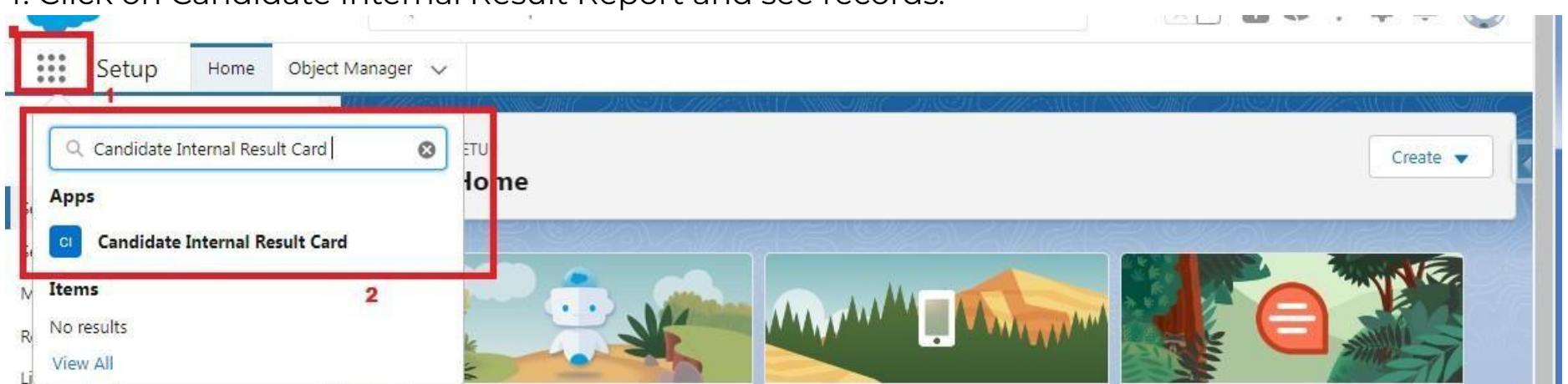
Total Records	4		
Course: Course Name	Semester: Semester Name	Course: Course Details	Duration
B.Com (C.A) (1)	semseter 05	B.Com (Computer Applications)	semseter 05
Subtotal			
BSc (BCCA) (1)	semester 05	BSc (Bio Technoloy,Chemistry,Computer Applications)	semester 05
Subtotal			
BSc (MECs) (1)	semester 03	BSc (Mathematics,Electronics,Computer Science)	semester 03
Subtotal			
BSc (MSCs) (1)	semester 01	BSc (Mathematics,Statistics,Computer Science)	semester 01
Subtotal			
Total (4)			

Row Counts Detail Rows Subtotals Grand Total

Search ENG IN 21:07 10-10-2023

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.



Reports

Recent

3

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

Report Name Description Folder Created By Created On Subscribed

Property 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

4

Total Records	4		
Course: Course Name	Semester: Semester Name	Course: Course Details	Duration
B.Com (C.A) (1)	semseter 05	B.Com (Computer Applications)	semseter 05
Subtotal			
BSc (BCCA) (1)	semester 05	BSc (Bio Technology, Chemistry, Computer Applications)	semester 05
Subtotal			
BSc (MECs) (1)	semester 03	BSc (Mathematics, Electronics, Computer Science)	semester 03
Subtotal			
BSc (MSCs) (1)	semester 01	BSc (Mathematics, Statistics, Computer Science)	semester 01
Subtotal			
Total (4)			

Row Counts Detail Rows Subtotals Grand Total

METHOD : 9

Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, 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.

The image consists of three vertically stacked screenshots from a software application interface, likely Microsoft Power BI or a similar dashboard tool.

Screenshot 1: New Dashboard Creation

This screenshot shows the "New Dashboard" creation dialog. The top navigation bar has a "Dashboards" button highlighted with a red box labeled 1. Below it, a search bar says "Search recent dashboards..." and a "New Dashboard" button is also highlighted with a red box labeled 2.

The main form fields are outlined with red boxes:

- Name:** "Candidate Internal Result Card" (highlighted with a red box labeled 3).
- Description:** An empty text input field.
- Folder:** A dropdown menu showing "Private Dashboards" (highlighted with a red box labeled 4).
- Create:** A blue "Create" button at the bottom right.

Screenshot 2: Employee Travel Detail View

This screenshot shows the "Employee Travel detail" view. The top navigation bar has a "Dashboards" button highlighted with a red box labeled 5.

A prominent blue "Add Component" button is highlighted with a red box labeled 6.

Screenshot 3: Add Component Dialog

This screenshot shows the "Add Component" dialog for a "Candidate Internal Result Report".

The "Report" section shows the report name "Candidate Internal Result Report" and a checkbox "Use chart settings from report" (unchecked).

The "Display As" section contains a grid of icons for different visualizations, with the second icon (a bar chart) highlighted with a red box labeled 7.

The "Preview" section displays a bar chart titled "Candidate Internal Result Report" with the following data:

Course: Course Name	Record Count
BCA	1
BSc	3
Btech	2
MBA	1

The "X-Axis" section shows the label "Course: Course Name".

At the bottom, there 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

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes 'Dashboards | Salesforce', 'Report (Short Term).docx', and a search bar. The main content area displays the 'Candidate Internal Result Card' dashboard. The left sidebar shows navigation links like 'Dashboards', 'Recent', and 'Folders'. The top navigation bar includes search, dashboard creation, and folder creation buttons. Red numbers 1 through 4 are overlaid on the interface to indicate specific steps: 1 points to the App Launcher icon, 2 points to the search bar, 3 points to the 'Dashboards' tab, and 4 points to the 'Candidate Internal Result Card' entry in the recent dashboards list.

2 WhatsApp Candidate Internal Result Card | Report (Short Term).docx

gayatridgeegetir-1c3-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z5g000000qRhKEAU/view?queryScope=userFolders

Cloud Candidate Internal ... Semesters Candidates Courses Details Lecturers Details Internals results Reports Dashboards

Dashboard Candidate Internal Result Card As of 11-Oct-2023, 6:25 pm-Viewing as KUMAR NANDINI Refresh Edit Subscribe

Candidate Internal Result Report

Record Count

Course: Course Name

B.Com (C.A) BSc (BCCA) BSc (MECs) BSc (MSCS)

View Report (Candidate Internal Result Report)

Search

18:26 11-10-2023 9

