

**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.

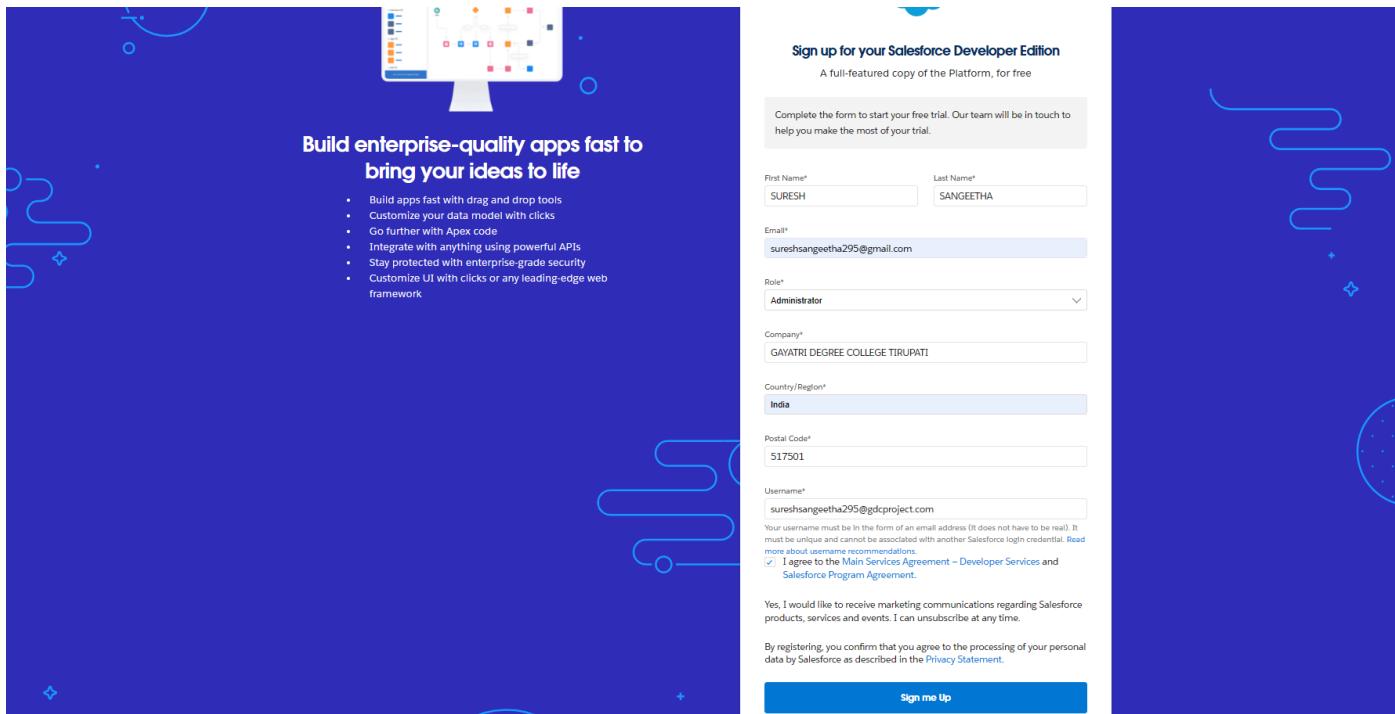
**Milestone 01:** Create Salesforce Org

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 – SURESH SANGEETHA
2. Email –sureshsangeetha295@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username:sureshsangeetha295@gdcproject.com



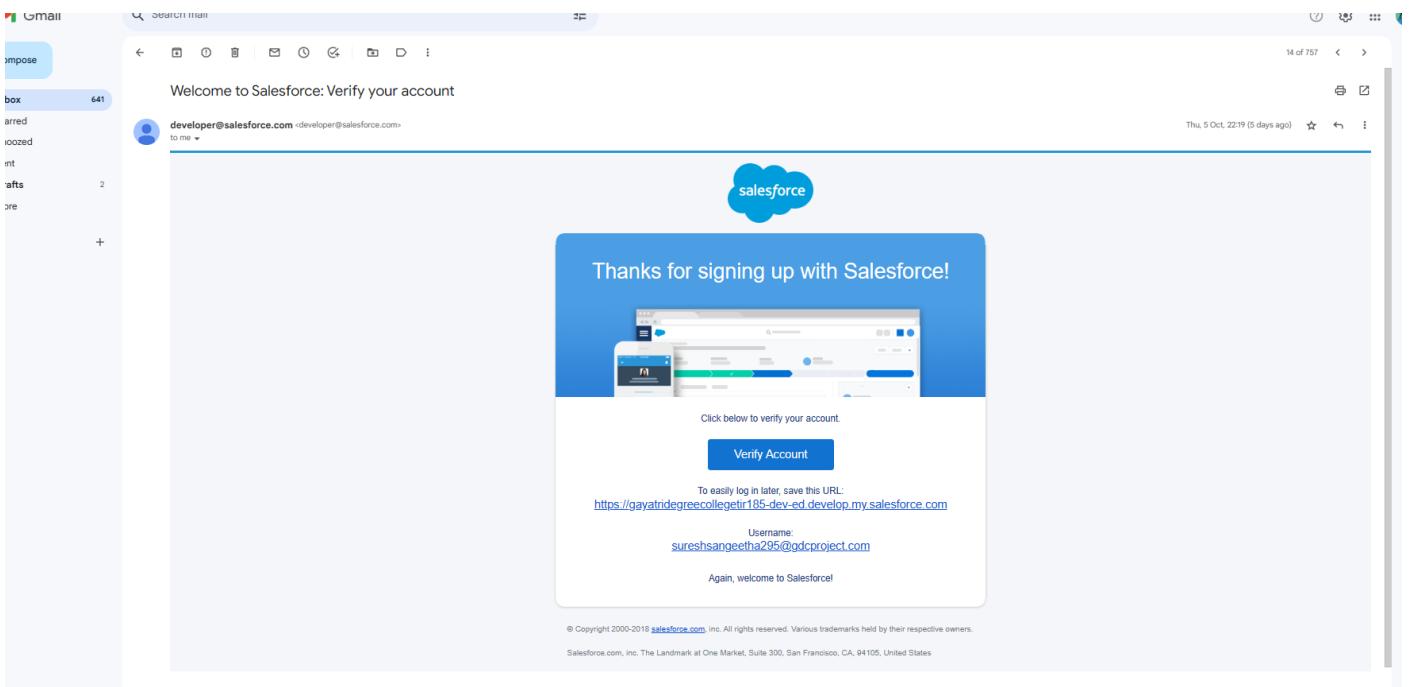
The screenshot shows the sign-up page for the Salesforce Developer Edition. The background is blue with abstract white line art. At the top, it says "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". Below that is a text box: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are as follows:

First Name*	Last Name*
SURESH	SANGEETHA
Email*	sureshsangeetha295@gmail.com
Role*	Administrator
Company*	GAYATRI DEGREE COLLEGE TIRUPATI
Country/Region*	India
Postal Code*	517501
Username*	sureshsangeetha295@gdcproject.com

Below the form, there is a note about username requirements: "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.](#)" There is also a checked checkbox for the "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." At the bottom, there is a note about marketing communications and a "Sign me Up" button.

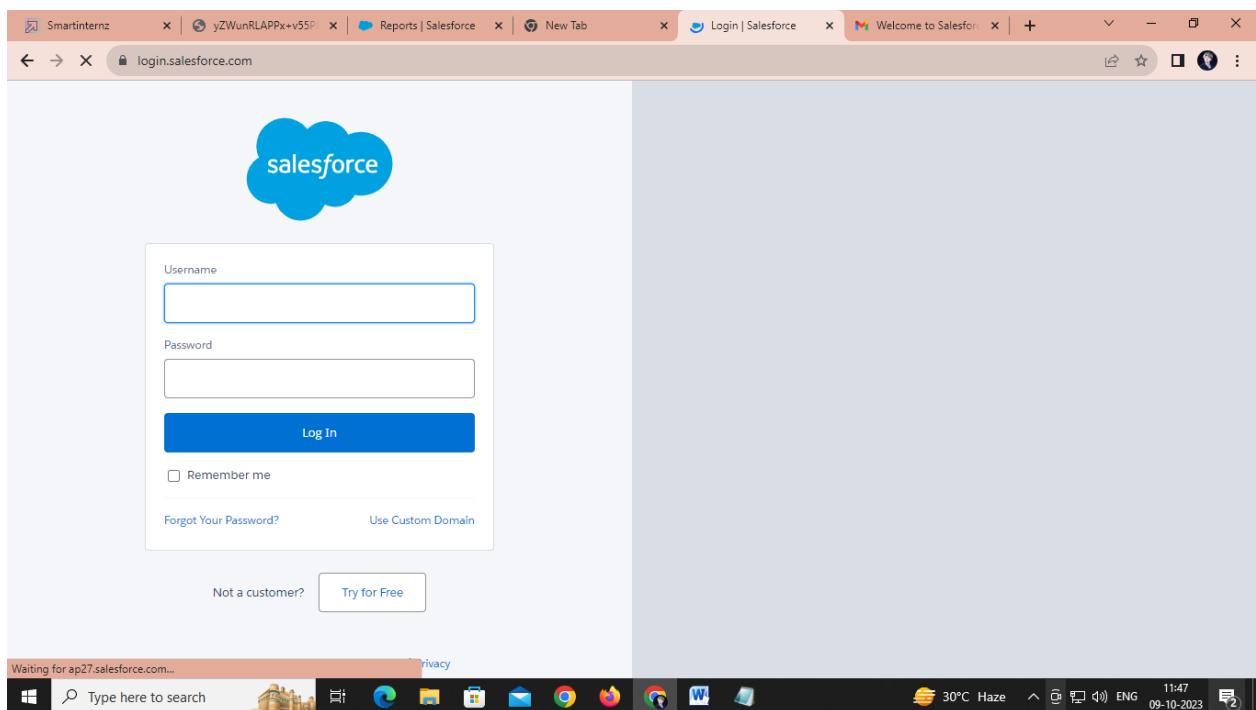
**Account Activation**

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



## Login to Your Salesforce Account

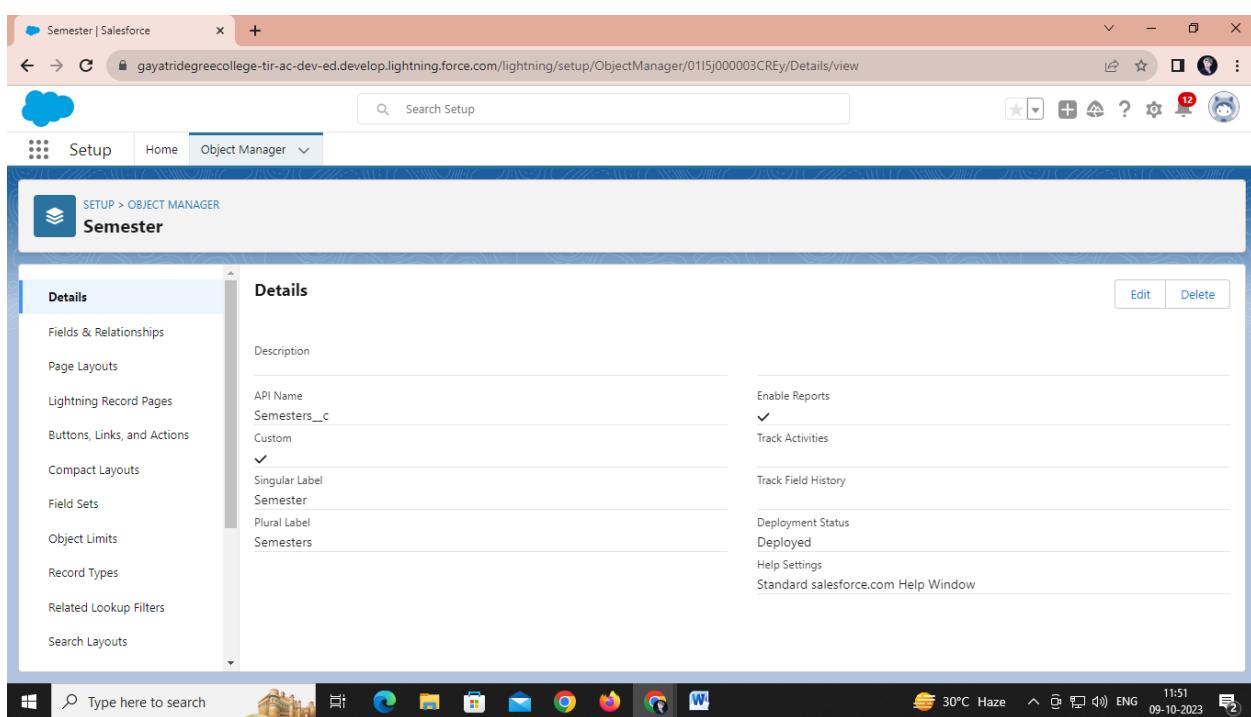
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



## Milestone – 02: Creation of Objects

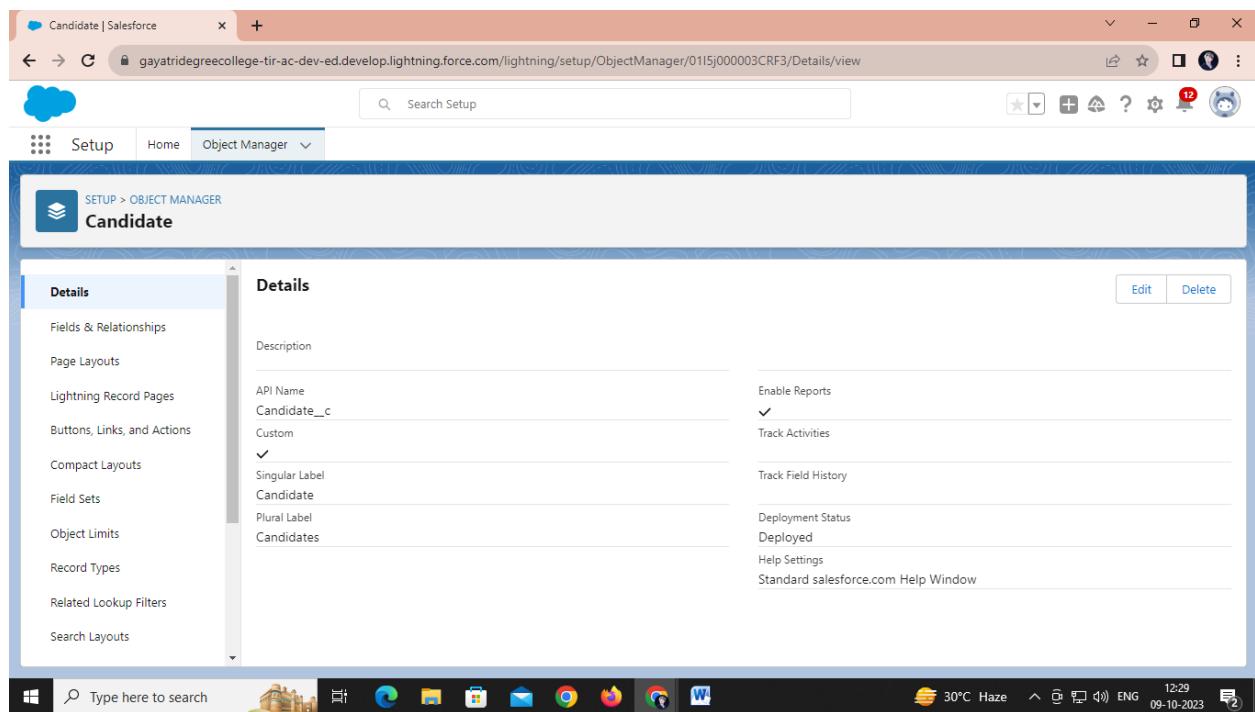
## Object – Semester

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



## Object – Candidate

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



## Object – Course Details

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

**Course Details**

**Details**

Description

API Name: Course\_Details\_\_c

Custom: ✓

Singular Label: Course Details

Plural Label: Course Details

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

## Object – Lecturer Details

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

**Lecturer Details**

**Details**

Description

API Name: Lecturer\_Details\_\_c

Custom: ✓

Singular Label: Lecturer Details

Plural Label: Lecturer Details

Enable Reports: ✓

Track Activities: ✓

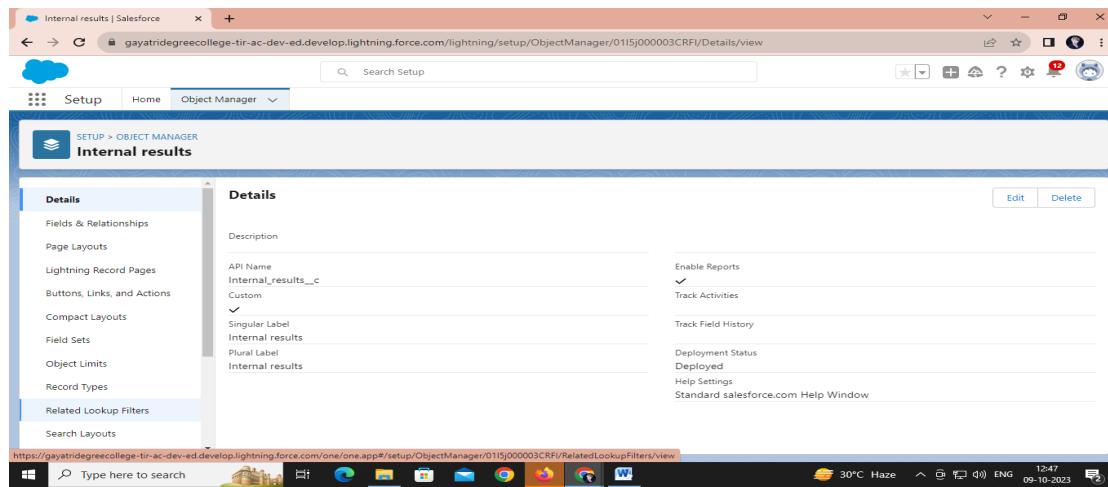
Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

## 1. Object – Internal results

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



### Milestone – 03: Tabs

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

**There are mainly 4 types of tabs:**

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

Now create a custom tab. Click the Home tab.

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

## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

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

Setup Home Object Manager

Q app man

App Manager 1

Didn't find what you're looking for?  
Try using Global Search.

Cloud Setup Home Object Manager

Q app man

Apps App Manager 2

Lightning Experience App Manager

New Lightning App New Connected App

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

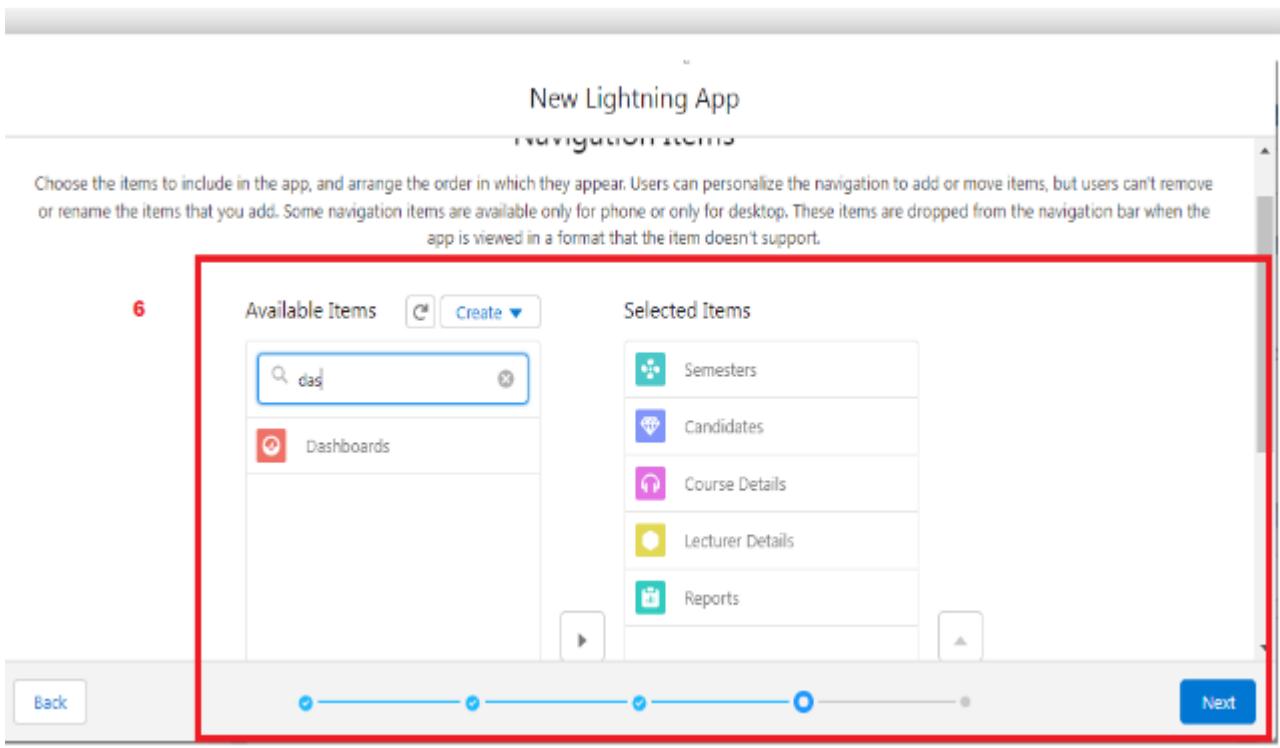
Description

App Branding

Image

Primary Color Hex  
Value #0070D2

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. Another red box labeled '2' highlights the 'Object Manager' tab in the top navigation bar. A third red box labeled '3' highlights the 'Lecturer\_Details\_\_c' entry in the list of objects.

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

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

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

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text 6

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

Allows users to enter any number. Leading zeros are removed.

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 256 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 local time. For example, "12:45 PM", "1:45 PM", "114:45:00", and "114:45:00 AM" 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.

[Next](#) [Cancel](#)

**Step 2. Enter the details** Step 2 of 4

Field Label  7

Length  8

Field Name  9

Description

Help Text

[Previous](#) [Next](#) [Cancel](#)

**SETUP > OBJECT MANAGER**

**Lecturer Details**

[Details](#)

**Fields & Relationships** [Help for this Page](#)

[Page Layouts](#)

[Lightning Record Pages](#)

[Buttons, Links, and Actions](#)

[Compact Layouts](#)

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[Restriction Rules](#)

[Scrapping Rules](#)

**Lecturer Details Custom Field**

**Lecturer Role**

[Back to Lecturer Details](#)

[Validation Rules](#)

**Custom Field Definition Detail**

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information		Object Name	Lecturer Details
Field Label	Lecturer Role	Data Type	Text
Field Name	Lecturer_Role		
API Name	Lecturer__Role_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	SURESH SANGEETHA, 07/10/2023, 8:25 pm	Modified By	SURESH SANGEETHA, 07/10/2023, 9:10 pm
General Options			
Required	<input type="checkbox"/>		
Unique	<input type="checkbox"/>		
Case Sensitive	<input type="checkbox"/>		
External ID	<input type="checkbox"/>		
Default Value			

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.

The screenshot shows the Salesforce Object Manager interface. A red box labeled '1' highlights the gear icon in the top right corner. A red box labeled '2' highlights the 'Object Manager' dropdown in the top left. A red box labeled '3' highlights the 'Lecturer\_Details\_\_c' API name in the list. The list table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

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 'Lecturer Details' object setup. A red box labeled '4' highlights the 'Fields & Relationships' tab. A red box labeled '5' highlights the 'New' button in the top right of the list table. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

Below the table, there are sections for 'Formula' and 'Roll-Up Summary'. A red box labeled '6' highlights the 'Lookup Relationship' section, which describes how it creates a relationship between the object and another object.

**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 pop-up 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 pop-up list. The master object is the source of the values in the list.

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Semester

**7**

Previous Next Cancel

Field Label: Semester Name

Field Name: Semester Name

Description:

Help Text:

**8**

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

SETUP > OBJECT MANAGER  
Semester

Details  
Fields & Relationships

Semester Field  
Semester Name  
Back to Semester

Field Information

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

Validation Rules

No validation rules defined.

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

Let's create a Number field on Course Details object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation

4. Click New & select number field, click Next

6. For Field Label Duration, enter.

7. Give Help Text- Enter Course duration value in Years

8. Click Next, Next, then Save & New.

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

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

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

**Screenshot 3:** Shows the "New Number Field" configuration page. A red box highlights the "Field Label" input field containing "Duration". A red number "6" is placed above the input field. Below it, a note says: "Please enter the length of the number and the number of decimal places. For example, a number with a length of 5 and 2 decimal places can accept values up to "12345678.90"." A red box highlights the "Length" input field containing "1". A red number "7" is placed above the "Length" field. A red box highlights the "Decimal Places" input field containing "2". A red number "8" is placed above the "Decimal Places" field. Other fields shown include "Field Name" (Duration), "Description" (empty), and "Help Text" (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 labeled '1' highlights the 'New' button in the top right corner. A red box labeled '2' highlights the 'Object Manager' tab in the top navigation bar. A red box labeled '3' highlights the 'Lecturer\_Details\_c' entry in the list, which is a 'Custom Object'.

The screenshot shows the 'Fields & Relationships' section for the 'Lecturer\_Details\_c' object. A red box labeled '4' highlights the 'Fields & Relationships' tab in the sidebar. A red box labeled '5' highlights the 'New' button in the top right corner of the list table. The table lists two fields: 'Address' (Text(50)) and 'Created By' (Lookup(User)).

The screenshot shows the 'Data Type' selection screen. A red box labeled '6' highlights the 'Formula' radio button, which is selected. Other options shown are 'None Selected' and 'Auto Number'. A note for 'Formula' states: '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.'

The screenshot shows the configuration screen for a formula field. A red box labeled '7' highlights the 'Field Label' input field containing 'Candidate Roll Number'. A red box labeled '8' highlights the 'Formula Return Type' input field containing 'Text'. Other options shown are 'None Selected', 'Checkbox', 'Currency', 'Date', 'DateTime', 'Number', and 'Percent'. A note for 'Text' states: 'Creates a text string, for example, by concatenating other text fields.'

Example: Full Name = LastName & ", " & FirstName More Examples... Operators & Functions

Simple Formula Advanced Formula

Insert Field **9** Insert Operator

Candidate Roll Number (Text) =

Functions All Function Categories ABS ACOS ADDMONTHS AND ASCII ASIN

Insert Selected Function

**10**

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

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

You have selected:  
 Candidate\_\_r.Candidate\_Roll\_Number\_\_c  
 Type: Auto Number  
 API Name: Candidate\_\_r.Candidate\_Roll\_Number\_\_c

Insert

SETUP > OBJECT MANAGER Candidate

Help for this Page

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

Candidate Custom Field Candidate Roll Number Back to Candidate

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information	Field Label	Candidate Roll Number	Object Name	Candidate	
Candidate Custom Field: Candidate Roll Number ~ Salesforce - Developer Edition			Data Type	Auto Number	
Description					
Help Text					
Data Owner					
Field Usage					
Data Sensitivity Level					
Compliance Categorization					
Created By	SURESH SANDEETHA 07/10/2023, 11:06 pm			Modified By	SURESH SANDEETHA 07/10/2023, 11:06 pm
General Options	External ID <input type="checkbox"/>				
Auto Number Options	Display Format				

Now Let's create an auto number field on Candidate object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation

5. Click New

6. Select the Auto Number as the Data Type, then click Next.

7. For Field Label Candidate enter Roll Number.

8. Give a display format

9. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. A red box labeled '1' highlights the 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\_c' entry in the list, which is selected. The list includes columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

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 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 list includes columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

The screenshot shows the 'Data Type' selection dialog. A red box labeled '6' highlights the 'Auto Number' radio button, which is selected. The dialog also contains 'None Selected' and 'Formula' options. A detailed description of 'Auto Number' is provided: 'A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.'

**Step 2. Enter the details**

Field Label	Candidate Roll Number	7
Display Format	CAD-(000)	Example: A-(0000) <a href="#">What Is This?</a>
Starting Number	1	8
<input type="checkbox"/> Generate Auto Number for existing records		
Field Name	Candidate_Roll_Number	9
Description		
Help Text		

**Step 2 of 4**

[Previous](#) [Next](#) [Cancel](#)

**Milestone – 06: users**

## Creating A User

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the First Name, Class, Last Name, Teacher and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as salesforce.
- NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license Or change the license type from Salesforce to any other.
6. Select a profile as Standard user.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Home, Object Manager, and various administrative settings like User Management Settings and Feature Settings. The 'Users' section is currently selected, indicated by a red box and the number '2'. The main content area is titled 'Users' and shows a table of 'All Users'. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. There are 6 rows of data, each with a checkbox for Action and a link to edit the user. The first user is '1\_User' with alias 'u1' and username 'utkarsh2@vanshiv.com'. The last user is 'Teddy\_John' with alias 'j\_ted' and username 'utkarsh1@vanshiv.com'. A 'New User' button is located at the top of the user list table.

User Edit

Save Save & New Cancel

**General Information**

First Name	Class	4
Last Name	Teacher	
Alias	cteach	
Email	+++@++++.com	
Username	+++@++++.com	
Nickname	class	
Title		
Company		
Department		

Role	<None Specified>	
User License	Salesforce	
Profile	Standard User	
Active	<input checked="" type="checkbox"/>	
Marketing User	<input type="checkbox"/>	
Offline User	<input type="checkbox"/>	
Knowledge User	<input type="checkbox"/>	
Flow User	<input type="checkbox"/>	
Service Cloud User	<input type="checkbox"/>	

### 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 Candidate Internal Result Card App interface. At the top, there is a navigation bar with various tabs: Semesters, Candidates, Course Details (which is highlighted with a red box and has a red number '3' above it), Lecturer Details, Reports, and Dashboards. Below the navigation bar, there is a search bar with the placeholder 'Search...' and a 'Recently Viewed' section. On the right side of the header, there are several icons for star, plus, question mark, gear, and others. The main content area is titled 'Course Details' and shows a list of recently viewed items. At the bottom right of the content area, there is a toolbar with a 'New' button (highlighted with a red box and a red number '4'), 'Import', and 'Change Owner' buttons, along with other standard list management icons.

New Course Details

Information

\*Course Name  
MBA

Duration  
2

Owner  
Vanshiv Technologies

5

6

Cancel Save & New Save

## 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 Candidate Internal Result Card application interface. At the top, there are navigation tabs: Semesters, Candidates (with a count of 3), Course Details (highlighted with a red box), Lecturer Details, Reports, and Dashboards. Below the tabs is a search bar with filters: Course Details (All), a search field, and buttons for New, Import, and Change Owner. A message indicates 4 items, sorted by Course Name, updated a few seconds ago. The main area displays a table of course details:

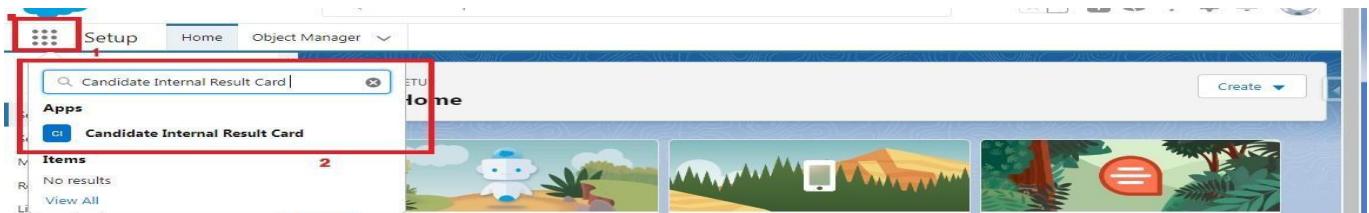
	Course Name ↑	Duration	Created Date
1	BCA	3.00	09/04/2023, 7:39 pm
2	BSc	3.00	09/04/2023, 7:39 pm
3	Btech	4.00	09/04/2023, 7:38 pm
4	MBA	2.00	09/04/2023, 7:38 pm

Below the table, a specific record for "B.Sc (Agriculture)" is shown in detail. The "Details" tab is selected. The record includes fields: Course Details Name (B.Sc (Agriculture)), Duration (2), Course Name (BSC), Created By (SURESH SANGEETHA, 10/10/2023, 7:52 pm), and Last Modified By (SURESH SANGEETHA, 10/10/2023, 7:52 pm). The "Owner" field shows SURESH SANGEETHA.

## 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

Recently Viewed

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

## Milestone – 08: what are Reports?

# What Are Reports?

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

There are 4 types of report formats in Salesforce:

**Tabular Reports:**

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

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

**Summary Reports:**

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

**Matrix Report:**

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

#### Joined Reports:

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

#### Report types:

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

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

There are 2 types of report types:

**Standard Report Types:** Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked. Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

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

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

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

There are 3 types of access levels of folders:

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

**Editor:** With this access level, users can view .

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

# Create Report

1. Click App Launcher
2. Select Candidate Internal Result Card App
3. Click reports tab
4. Click New Report.
5. Click the report type as Semesters with Course Click Start report.
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a Matrix Report).
7. Click refresh
8. Click save and run
9. Give report name – Candidate Internal Result Report
10. Click Save

The image consists of three vertically stacked screenshots of a report builder interface, likely from a cloud-based platform like Salesforce or similar. Each screenshot shows a different stage of the report creation process:

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

1. On the report builder page, locate the "Fields" pane on the left-hand side.

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

The screenshot shows the 'Edit Bucket Column' dialog box. The 'Field' dropdown is set to 'Course: Duration'. The 'Bucket Name' dropdown is set to 'Duration'. The 'Range' table contains three rows:

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

A checkbox 'Treat empty Course: Duration values in the report as zeros.' is checked. The background shows a report outline with 'Semesters' and 'Candidate Internal ...' selected.

The screenshot shows the 'Save Report' dialog box. The 'Report Name' field is filled with 'Candidate Internal Result Report' and has a red border. The 'Report Unique Name' field is filled with 'Candidate\_Internal\_Result\_Report\_bkY'. The 'Save' button at the bottom right is highlighted with a red box and labeled '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.

Screenshot 1 (Top):

Setup Home Object Manager

Candidate Internal Result Card

Apps Candidate Internal Result Card

Items 2

No results View All

Screenshot 2 (Bottom):

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

Reports Recent 9 items

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



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
<b>Subtotal</b>			
<input type="checkbox"/> BCA (1)	Semester 06	BCA (Data Science)	Small Course
<b>Subtotal</b>			
<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
<b>Subtotal</b>			
<input type="checkbox"/> MBA (1)	Semester 01	MBA (Finance)	Large Course
<b>Subtotal</b>			
<b>Total (7)</b>			

### 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 (which is 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 dropdown menu is open under "Dashboards" with the option "Recent" selected. The main content area shows a list titled "Recent" with one item: "3 items".

This screenshot shows the "New Dashboard" dialog box. It has fields for "Name" (containing "Candidate Internal Result Card |", highlighted with a red box) and "Description" (containing "3", highlighted with a red box). There is a "Folder" section with a dropdown set to "Private Dashboards" and a "Select Folder" button. At the bottom are "Cancel" and "Create" buttons, with "Create" highlighted with a red box.

The screenshot shows the "Employee Travel detail" dashboard. At the top, there is a search bar and various dashboard settings. In the center, there is a grid of empty cards. A dialog box titled "Add Component" is open, with a "Report" section containing a report titled "Candidate Internal Result Report" and a checkbox for "Use chart settings from report". Below this is a "Display As" section with several chart icons, one of which is highlighted with a red box and labeled "7". The "Preview" section shows 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

At the bottom of the dialog are "Cancel" and "Add" buttons, with "Add" highlighted with a red box.

This screenshot shows the "Add Component" dialog box in more detail. The "Report" section shows "Candidate Internal Result Report" and a checked box for "Use chart settings from report". The "Display As" section contains a grid of chart icons, with one highlighted with a red box and labeled "7". The "X-Axis" section shows "Course: Course Name". The "Preview" section displays the same bar chart as the previous screenshot. At the bottom are "Cancel" and "Add" buttons, with "Add" highlighted with a red box.

Sent Mail - abhithanov20@gmail.com | abhitha.doc - Google Docs | Smartinternz | Dashboards | Salesforce

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

Search... Search recent dashboards... New Dashboard New Folder

Dashboards Recent 1 item

Dashboards	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	SREENIVASULU ABHITHA	9/10/2023, 2:25 pm	

Created by Me  
Private Dashboards  
All Dashboards  
Folders  
All Folders  
Created by Me Shared with Me  
Favorites All Favorites

javascript:void(0);

## 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

Setup Home Object Manager

Candidate Internal Result Card

Apps

Candidate Internal Result Card

Items 2

No results

Create

ETU

Home

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

Dashboards Recent 8 items

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Properties with Customer Name Report		Private Dashboards		8/4/2023, 12:58 pm	
Created by Me	Job application with candidate name		Private Dashboards		8/4/2023, 7:14 pm	
Private Dashboards	Events with Attendees		Private Dashboards		6/4/2023, 5:23 pm	
All Dashboards	<b>Candidate Internal Result Card</b> 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	

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

Candidate Internal Result Card

Candidate Internal Result Report

Record Count

Course: Course Name

B.Tech: 2  
BCA: 1  
BSC: 3  
MBA: 1

View Report (Candidate Internal Result Report)

THE END



