

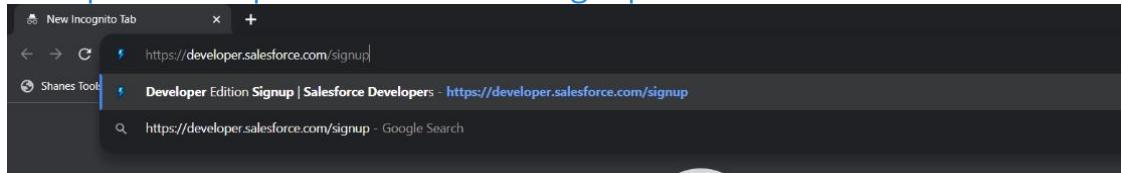
## Implementing CRM for Result Tracking of A Candidate with Internal Marks

**Submitted by:-Vaibhav Waghmare**

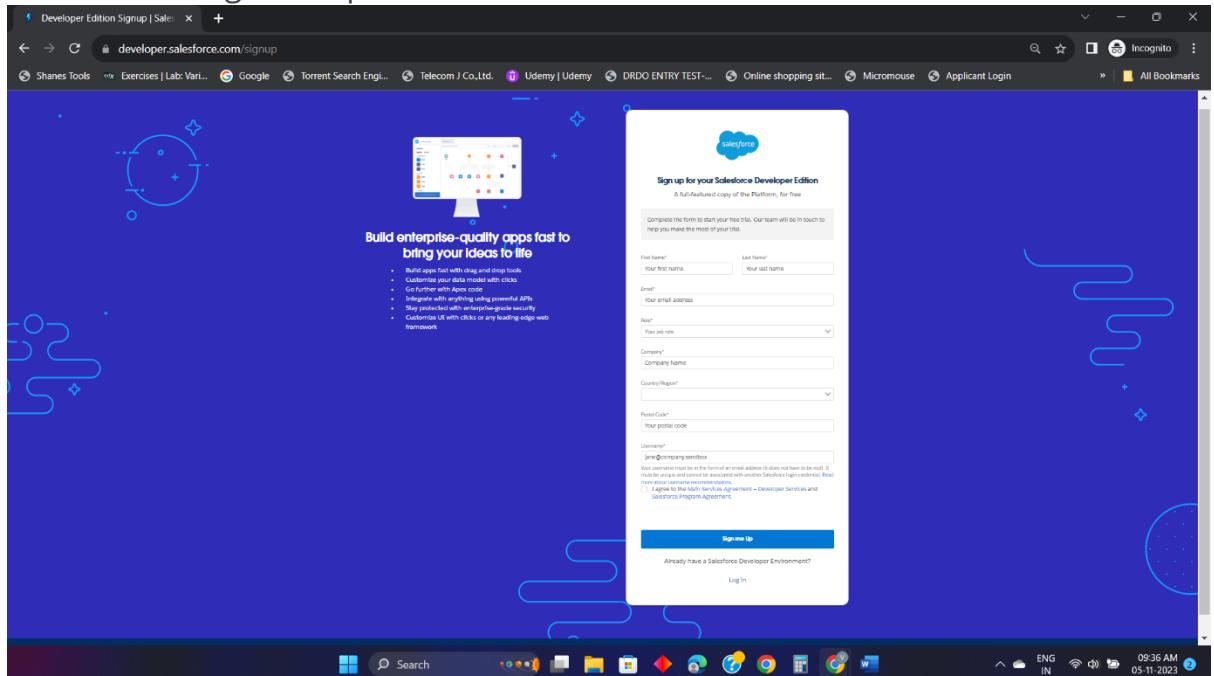
The administrator should be able to create all base data including Semester, Candidate, Course and Lecturer ,Lecturer should have the ability to create Internal Results, Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results, Re-evaluation Can be initialized by Candidate for all Internal Results. Now only dean can update the marks after re- evaluation.

Step 1: Creating Developer org for Configuration of CRM

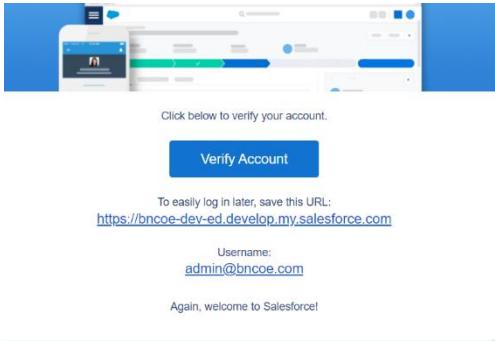
1. Go to the Salesforce Developer website at <https://developer.salesforce.com/signup>.



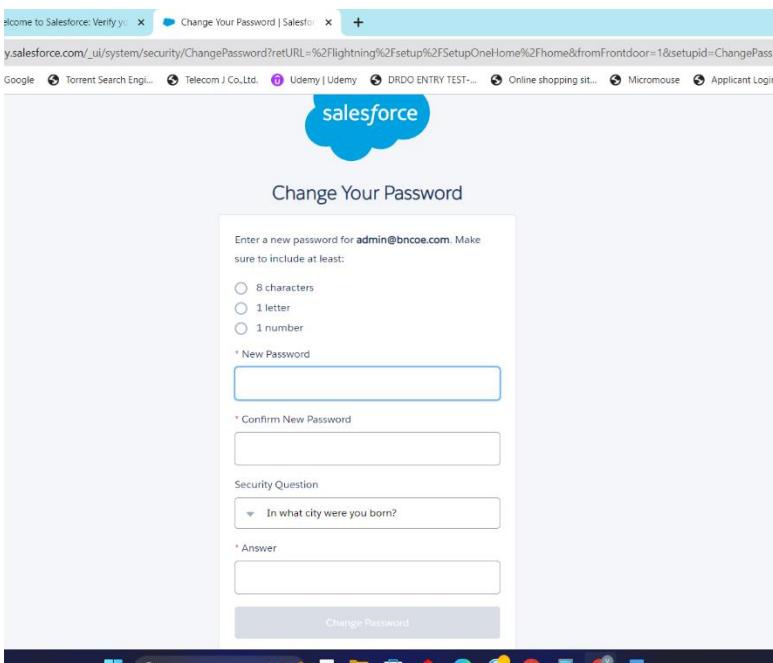
2. Fill out the registration form with your information, including your name, enter email address where u can verify this account, select role as developer as you need developer org, company,country,postal code, username for login.
3. Check the box to agree to the terms and conditions.
4. Click on the "Sign me up" button.



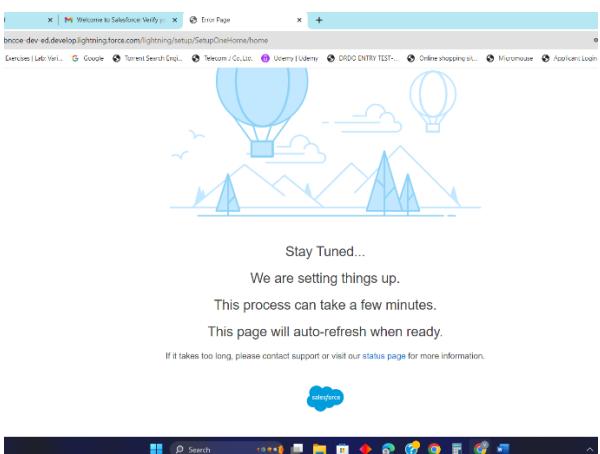
5. You will receive an email from Salesforce with a link to activate your account. Click on the link to activate your account.



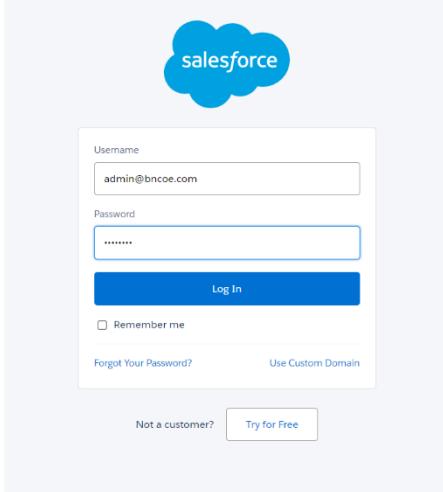
6. This will redirect to enter Password One security question then click change password



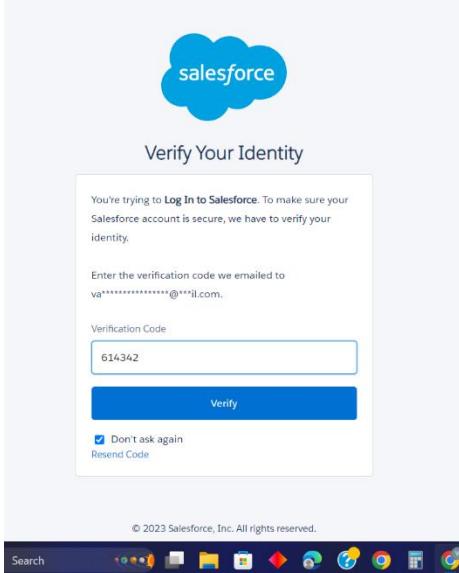
7. Sometime it may take time to setup page so be patient no need create another one wait



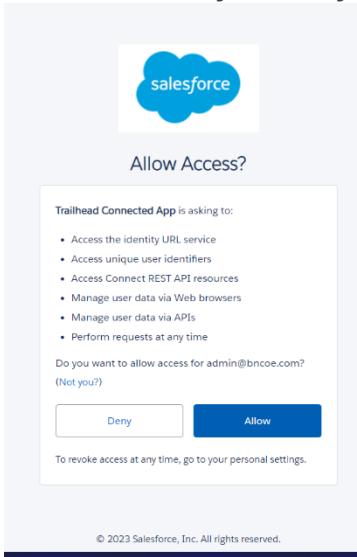
Try again with username and password for login



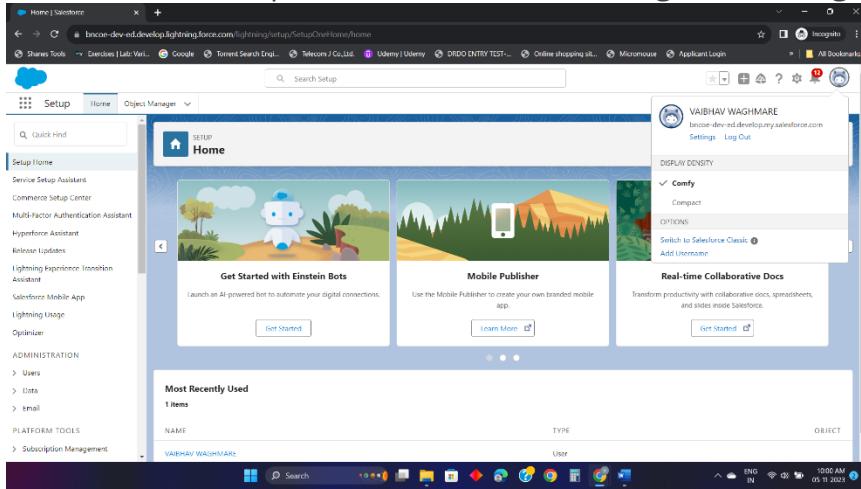
It will ask for verification code sent to your register email id enter it



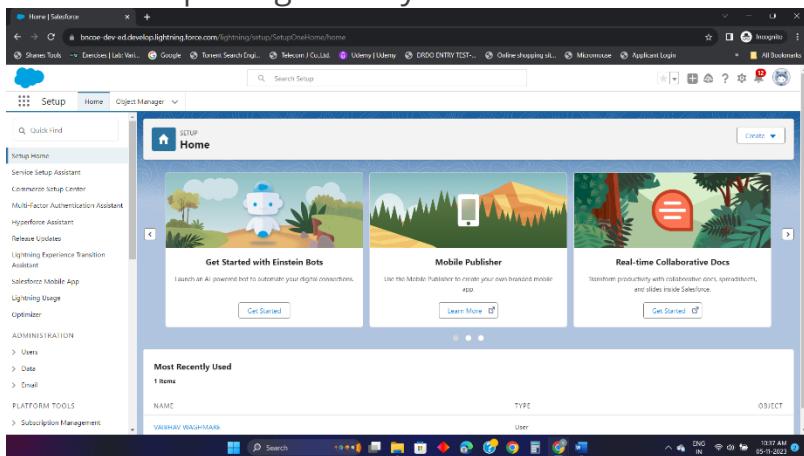
Select Allow if you deny you have to repeat this step again from login



- Click Allow and your account is activated, you will be redirected to the Salesforce Developer Dashboard. Click on logout, and login again.



- Your developer org is ready



- Creation of Object for Candidate Internal Result Card

Click on the gear icon and then select Setup.

Click on the object manager tab just beside the home tab.

After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

On the Custom Object Definition page, create the object as follows:

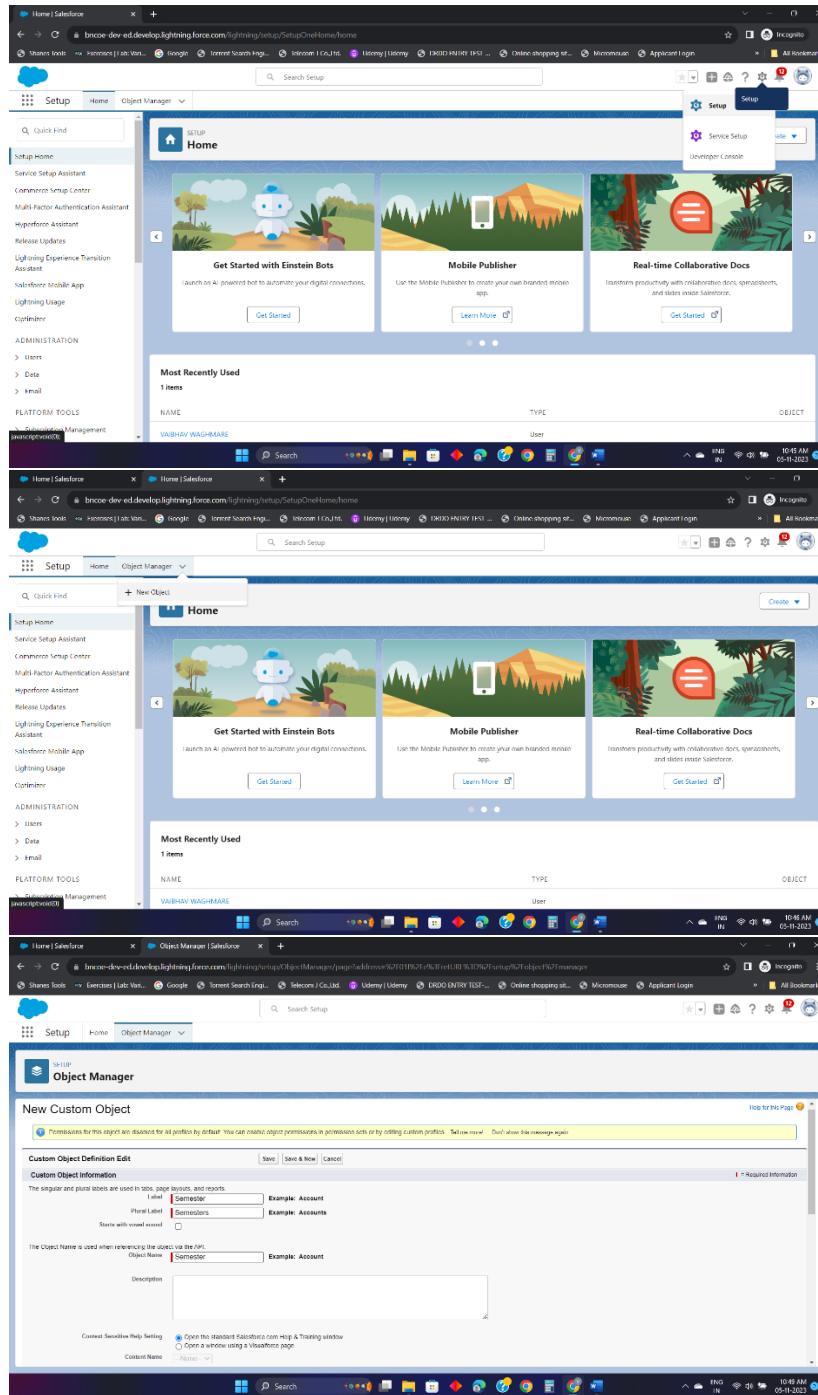
**Label: Semester**

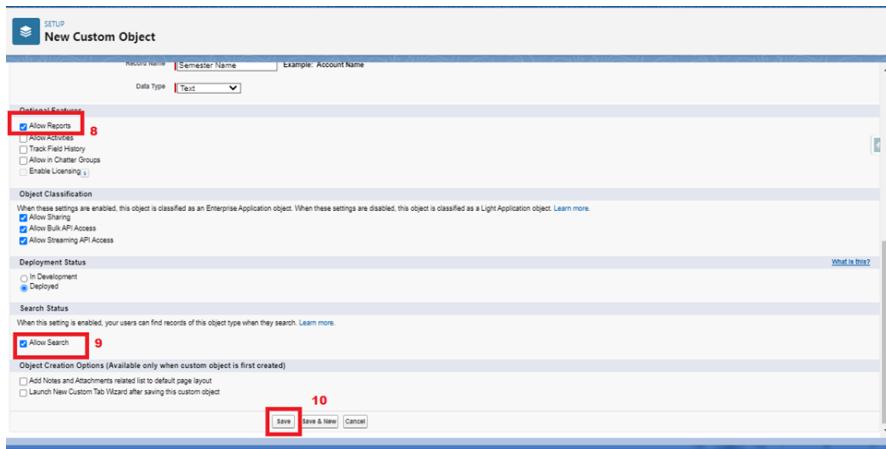
**Plural Label: Semesters**

**Record Name: Semester Name**

**Check the Allow Reports**

## Check the Allow Search Click Save

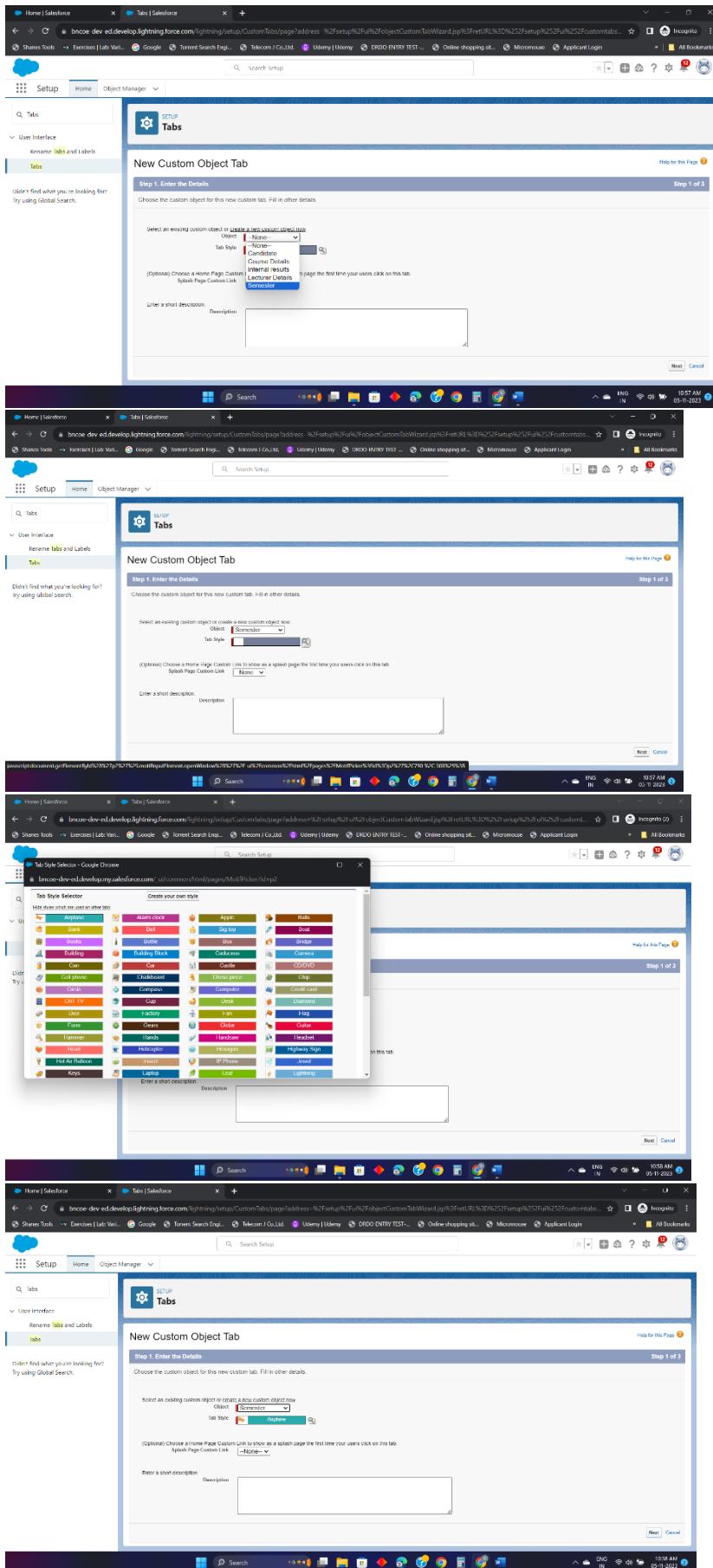


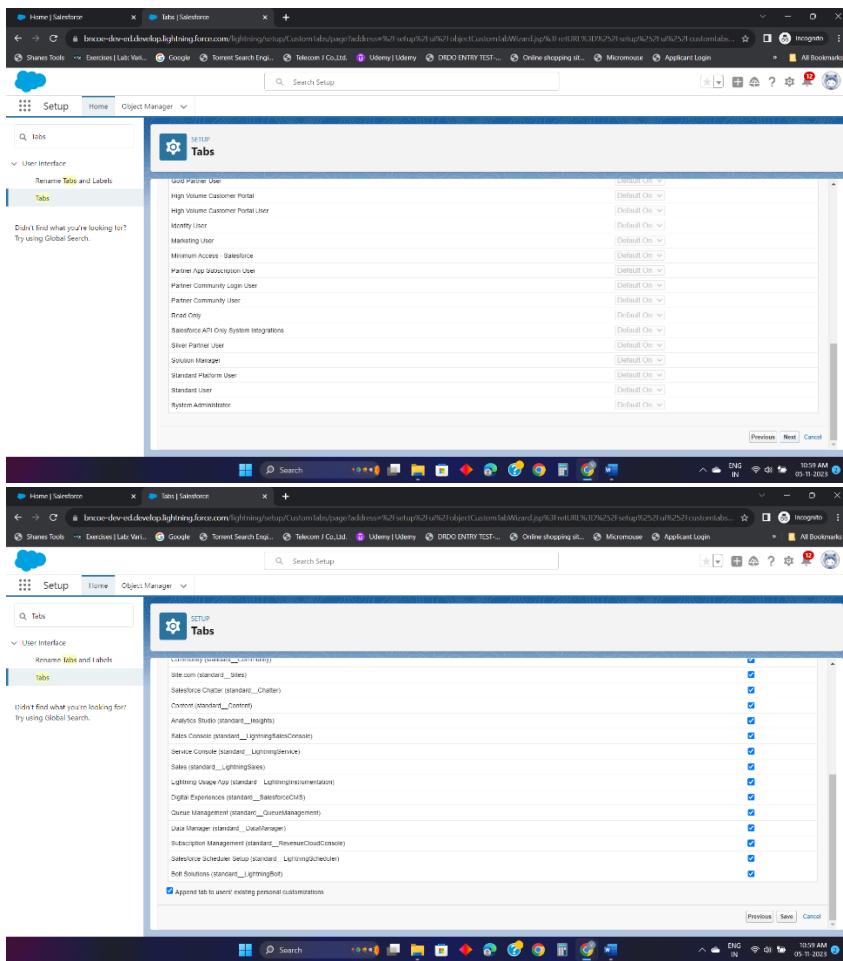


In the same way create **4** more objects as **Candidate, Course Details, Lecturer Details** and **Internal results**.

## 11. Creation Of Tab

Enter Tabs in Quick Find and select Tabs Under Custom Object Tabs, click New For Object, select **Semester**  
For Tab Style, select any icon  
Leave all defaults as is. Click Next, Next, and Save





In the same way create Tabs for all Custom Objects -Candidate, Course Details, Lecturer Details, Internal results.

## 12. 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, Internalresults, 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

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<https://bncoe-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home>

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Cloud Setup Home Object Manager Search Setup Quick Find

**SETUP Home**

Get Started with Einstein Bots Launch an AI-powered bot to automate your digital connections. Get Started Learn More

Mobile Publisher Use the Mobile Publisher to create your own branded mobile app. Learn More

Real-time Collaborative Docs Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Get Started

**Most Recently Used**

1 items

NAME	TYPE	OBJECT
VAIBHAV WAGHMARE	User	

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Cloud Setup Home Object Manager Search Setup Quick Find

**SETUP Home**

Get Started with Einstein Bots Launch an AI-powered bot to automate your digital connections. Get Started Learn More

Mobile Publisher Use the Mobile Publisher to create your own branded mobile app. Learn More

Real-time Collaborative Docs Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Get Started

**Most Recently Used**

1 items

NAME	TYPE	OBJECT
VAIBHAV WAGHMARE	User	

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**Home | Salesforce**

<https://bncoe-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home>

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Cloud Setup Home Object Manager Search Setup Quick Find

**SETUP Lightning Experience App Manager**

New Lightning App New Connected App

21 items • Sorted by App Name • Filtered by All appmenmts - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App T...	Visib...
All Tabs	AllTabSet		05/11/2023, 6:32 am	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	05/11/2023, 6:32 am	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	05/11/2023, 6:32 am	Classic	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	05/11/2023, 6:34 am	Lightning	✓
Community	Community	Salesforce CRM Communities	05/11/2023, 6:32 am	Classic	✓
Content	Content	Salesforce CRM Content	05/11/2023, 6:32 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	05/11/2023, 6:32 am	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	05/11/2023, 6:32 am	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	05/11/2023, 6:32 am	Lightning	✓
Marketing	Marketing	Best-in-class on-demand marketing automation	05/11/2023, 6:32 am	Classic	✓
Platform	Platform	The fundamental Lightning Platform	05/11/2023, 6:32 am	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	05/11/2023, 6:32 am	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	05/11/2023, 6:32 am	Classic	✓

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**New Lightning App**

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

**App Details**

\*App Name: Candidate Internal Result Card  
 \*Developer Name: Enter a developer name...  
 Description: Enter a description...

**App Branding**

Image:  Primary Color Hex Value: #0070D2  
  
 Use the app's image and color instead of the org's custom theme

**App Launcher Preview**

Next

**Navigation and Form Factor**

\*Navigation Style: Standard navigation (selected)  
 Standard navigation  
 Console navigation

\*Supported Form Factors: Desktop and phone (selected)  
 Desktop  
 Phone

**Setup and Personalization**

Setup Experience: Setup (full set of Setup options) (selected)  
 Service Setup

**App Personalization Settings**

Disable end user personalization of nav items in this app  
 Disable temporary tabs for items outside of this app

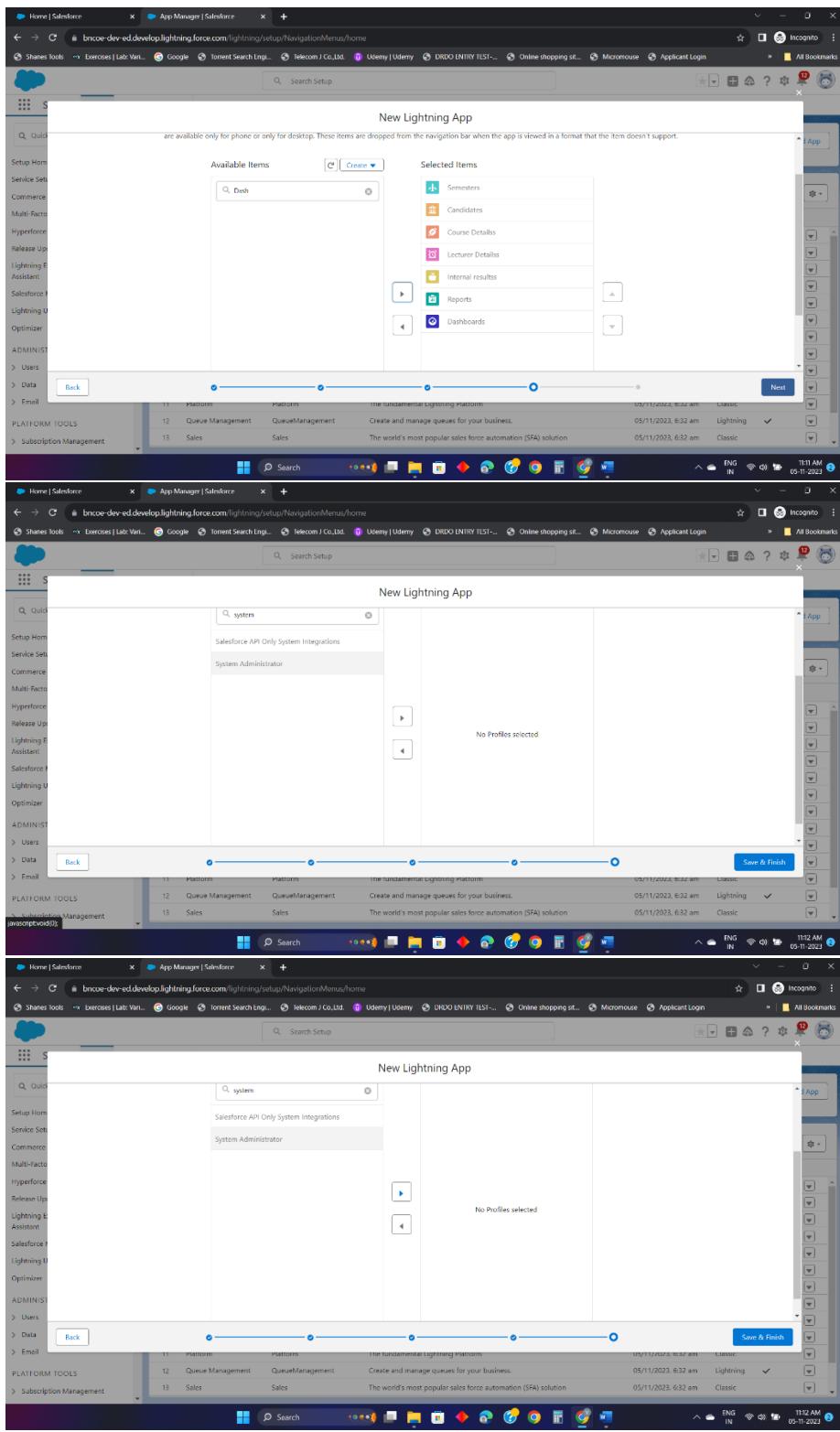
**Utility Items (Desktop Only)**

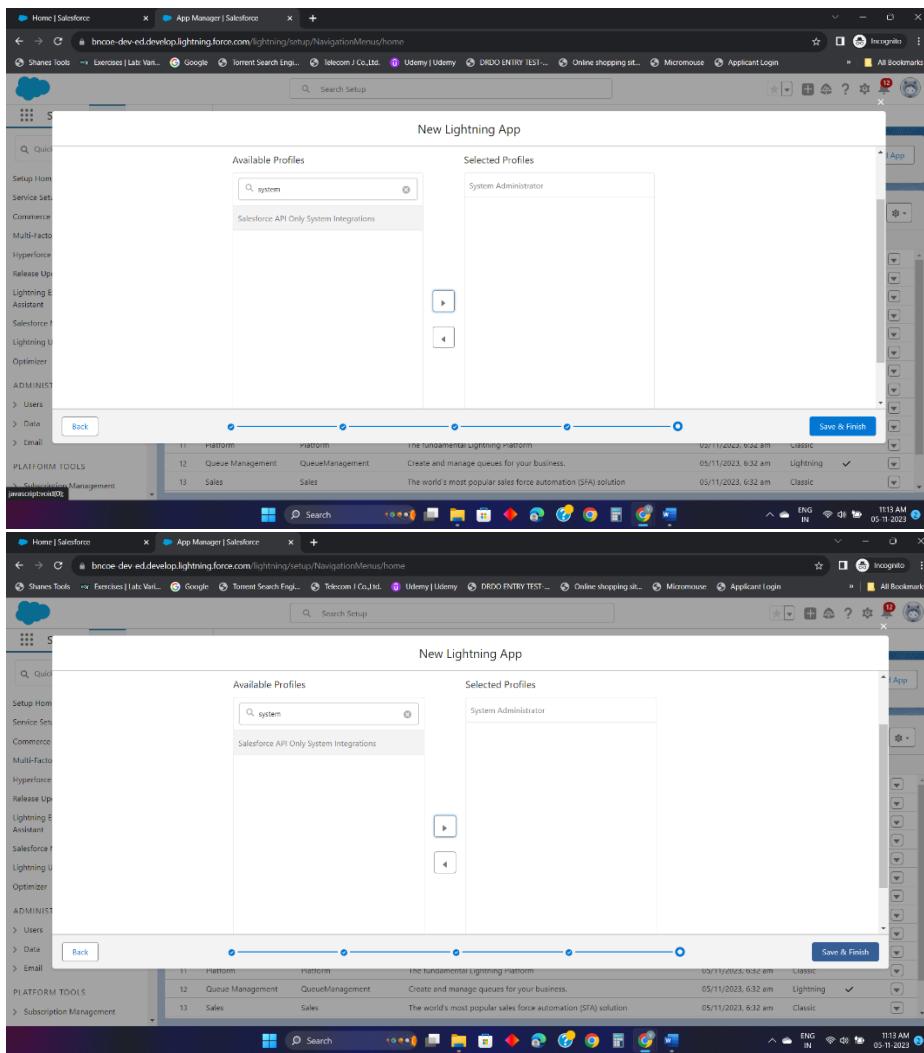
Add Utility Item

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Utility Bar: Default

Next





Now, We have to create fields and relationship for this object as follows:

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

<b>Internal results</b>	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	Lookup(Course)
	Marks	Number

### 13. Creation Of Field and Relationship for "Semester" Object

Goto gear icon select setup

Click on object manager  
In Search box search for semester click on it  
In left side click on Field and Relationship click New  
Select datatype as text click next  
Field label: Semester Name  
Field name:Semester\_Name  
Length: 40  
Then leave as it is  
Click next-next-save and new.

Select datatype as lookup  
Related to Course Details  
Field label: Course  
Field Name:Course  
Leave as it is  
Click next-next-next-save.

Here we have created two fields for Semester object, Similarly follow this steps for creating fields for other remaining object.

14. In Internal results object we have to create a lookup relationship related to Candidate label name: Candidate

To create a formula field in Internal Result Object

Click new

Select datatype formula

Field Label: Candidate Roll Number

Field Name: Candidate\_Roll\_Number

Click Next

Select Advanced Formula

Click Insert Field

Select:Internal result>Candidate>Candidate Roll Number click Insert

## Click next-next-save

The screenshots illustrate the process of creating a custom object in Salesforce:

- Screenshot 1:** Shows the 'Object Manager' page with one item listed: 'Internal results' (Custom Object). The URL is [/lightning/setup/ObjectManager/home](#).
- Screenshot 2:** Shows the 'Fields & Relationships' page for the 'Internal results' object. It lists fields like Candidate, Created By, Internal results.Name, Last Modified By, and Owner. The URL is [/lightning/setup/ObjectManager/01Gh000001aa3T/FieldsAndRelationships/view](#).
- Screenshot 3:** Shows the 'New Custom Field' wizard, Step 1: Choose the field type. The 'Formula' option is selected. The URL is [/lightning/setup/ObjectManager/01Gh000001aa3T/FieldsAndRelationships/new](#).

Internal results | Salesforce New Tab

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Internal results

Step 2. Choose output type Step 2 of 5

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

Field Label Candidate Roll Number

Field Name Candidate\_Roll\_Number

Auto add to custom report type  And this field to existing custom report types that contain this entity [?](#)

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.  
Example: `(TODAY() < CreatedDate)`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `(Amount - Total_Amount) / Cost`

Date Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `ReminderDate = CreateDate + 7`

DateTime Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: `EndDateTime = StartDateTime + 1`

Number Calculate a numeric value.  
Example: `Percentage = 1.8 * Celcius_c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount - Discount_Amount) / Amount`

Text Creates a string value, for example, by concatenating other field values.  
Example: `Full Name = FirstName + " " + LastName`

The screenshot shows the 'Object Manager' section of the Microsoft Dynamics 365 setup. A new field named 'Candidate Roll Number (Text)' is being created. The 'Formula' tab is selected, displaying a formula editor with the placeholder 'Full Name = LastName & " " & FirstName'. Below the editor, a dropdown menu lists various functions under the 'All Function Categories' heading, including 'BEGINSWITH', 'ACOS', 'ADDMONTHS', 'AND', 'ASCII', and 'ASIN'. A 'Quick Tips' box on the right provides links to 'Getting Started' and 'Operators & Functions'.

Search Setup

SETUP > OBJECT MANAGER Internal results

Previous Next Cancel

Quick Tips

- Getting Started
- Operators & Functions

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

Insert Field

Example: [Full Name = LastName]

Simple Formula Advanced Formula

Insert Field

Candidate Roll Number (Text) =

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

Internal results -> Candidate > Candidate Roll Number

SAPs > Candidate > Candidate Roll Number

B'Organization > Candidate > Candidate Roll Number

B'User > Candidate > Candidate Roll Number

B'Systems > Candidate > Candidate Roll Number

B'UserRole > Candidate > Candidate Roll Number

Candidate Name

Created By > Candidate > Candidate Roll Number

Created Date > Candidate > Candidate Roll Number

Created ID > Candidate > Candidate Roll Number

Last Modified By > Candidate > Candidate Roll Number

Last Modified Date > Candidate > Candidate Roll Number

Last Modified ID > Candidate > Candidate Roll Number

Owner (Name) > Candidate > Candidate Roll Number

You have selected  
Candidate\_\_c.Candidate\_Roll\_Number\_\_c

Type Auto Number

API Name: Candidate\_\_c.Candidate\_Roll\_Number\_\_c

Insert

The screenshots illustrate the process of creating a new custom field in Salesforce:

- Screenshot 1: Formula Editor**  
Shows the formula editor with the formula `Candidate__c > Candidate_Roll_Number__s`. The sidebar lists various functions like ABS, ACOS, ANDMONTHS, AND, ASIN, ASINH, and ATAN.
- Screenshot 2: Field-Level Security**  
Shows Step 4 of 6: Establish field-level security. It lists profiles and their visibility and readability settings. Most profiles have "Visible" checked and "Read-Only" checked.
- Screenshot 3: Page Layouts**  
Shows Step 5 of 6: Add to page layouts. It lists page layouts and checkboxes for "Add Field". The "Internal results Layout" checkbox is selected.

## 15. Creating A User

In Setup In quick find box search Users  
 Then Select Users Click New User  
 Then insert Field required information  
 And select User License: Salesforce, Profile: Standard User,  
 Click Save

The image consists of three vertically stacked screenshots of the Salesforce Setup interface, illustrating the steps to create a new user:

- Screenshot 1:** Shows the "Users" section of the Setup Home page. It features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards is a section titled "Most Recently Used" which lists "10 items".
- Screenshot 2:** Shows the "All Users" page under the "Users" section. It displays a grid of users with columns for "Name", "Type", and "Object". A search bar at the top is set to "Search Setup".
- Screenshot 3:** Shows the "New User" creation page. The "User Edit" form is open, showing fields for "First Name" (Case), "Last Name" (Teacher), "Alias" (ctcase), "Email" (valentavivek14@gmail.com), "Username" (User10994400001753766), "Nickname" (User10994400001753766), "Title" ( ), "Company" ( ), "Department" ( ), and "Division" ( ). On the right side, there are dropdown menus for "Role" (selected: "Not Specified"), "User License" (selected: "Salesforce"), and "Profile" (selected: "Standard User"). Other checkboxes like "Active" and "Marketing User" are checked.

## 16. Creating User Adoption

Here We have to create records for Created objects by following steps

Goto App Launcher Search for 'Candidate Internal Ressult Card' click on it

Select Course details

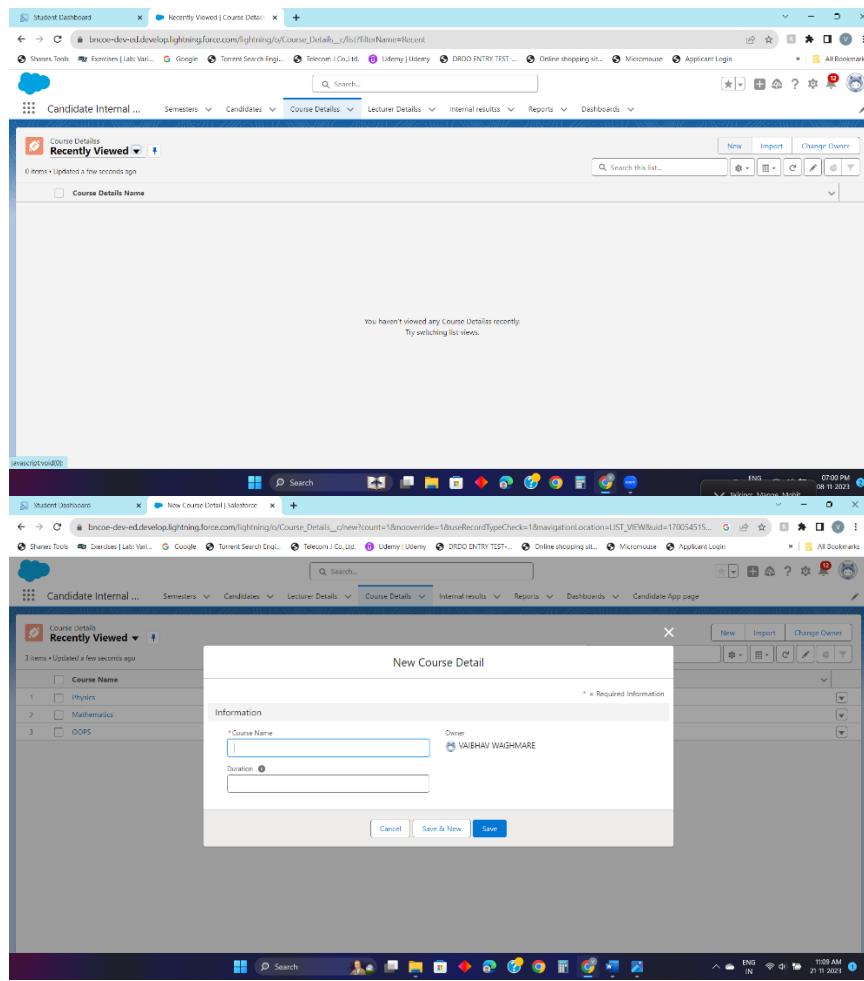
Click New

Enter Course Details

Enter Duration

Repeat this step for remaining objects too.

The top screenshot displays the 'User Detail' page for a user named 'Class Teacher'. The user's email is listed as 'vishnaveg@gmail.com [REDACTED]'. The 'Role' section indicates 'Salesforce Standard User' with 'Active' checked. The bottom screenshot shows the 'Recently Viewed' list for 'Course Details', which is currently empty, displaying the message 'You haven't viewed any Course Details recently. Try switching list views.'



## 17. View Record

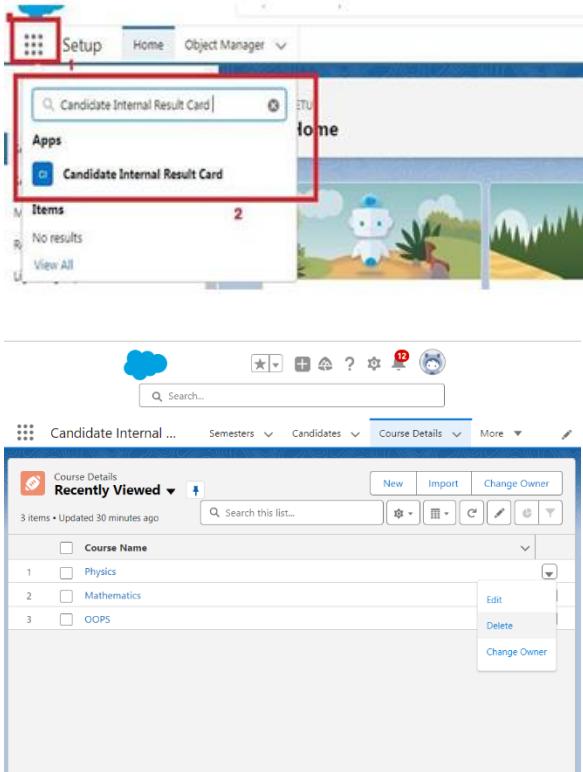
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.

4.Click on any record name. you can see the details of the Driver

The screenshot shows the Salesforce Lightning interface. At the top, there is a navigation bar with links like 'Student Dashboard', 'Users | Sidebar', and a search bar. The main content area has a title 'User Detail' and a sub-section 'Recently Viewed Course Details'. The 'User Detail' section contains fields for Name (teacher), Alias (choc), Email (vathsawaghmare13@gmail.com), and Roles (User). Other sections include 'User Management Settings' (with tabs for 'Items', 'Roles', and 'User Management Settings'), 'Prospector' (with a link to 'Prospector Users'), and 'Feature Settings' (with a link to 'Data.com'). The 'Recently Viewed' section lists three items: Physics, Mathematics, and OOPS.

18.Delete Record

- 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.



## 19.Creating a Report for Candidate Internal Result

- 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

Three screenshots of a Salesforce Lightning application interface:

**Screenshot 1: Candidate Internal Result Card**

The interface shows a list of candidates under "Mechanical Engineering". The list includes:

- Mechanical Engineering (checkbox)
- Civil Engineering (checkbox)
- Computer Science Engineering (checkbox)

**Screenshot 2: Reports Dashboard**

The dashboard displays a sidebar with navigation links:

- Reports
- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports
- Folders
- All Folders
- Created by Me
- Shared with Me
- Favorites
- All Favorites

A central area says "Recent reports appear here" with a "View All Reports" link.

**Screenshot 3: Create Report**

The "Create Report" dialog box is open, showing a search bar for "Report Type Name" with the term "semesters" entered. Below it, a table lists report types categorized by "Category":

Report Type Name	Category
Semesters	Standard
Semesters with Course	Standard
Candidates with Semester Name	Standard

**Create Report**

**Select a Report Type**

Report Type Name	Category
Semesters with Course	Standard
Candidates with Semester Name	Standard

**Details**

**Semesters with Course** Standard report type

**Start Report**

**Created By You**  
No Reports Yet

**Created By Others**  
No Reports Yet

**Objects Used in Report Type**

**Report**

**New Semesters with Course Report**

**Outline**

**Groups**

- GROUP ROWS
- Add group...

**Columns**

- Add column...

**Semester: Semester Name**

**Course: Course Name**

**Previewing a limited number of records. Run the report to see everything.**

Semester: Semester Name	Course: Course Name
1st sem	Physics
1st sem	Mathematics
1st sem	OOPS

**Save & Run**

**Report**

**New Semesters with Course Report**

**Outline**

**Groups**

- GROUP ROWS
- Add group...

**Course Duration**

**Columns**

- Add column...

**Semester: Semester Name**

**Course: Course Name**

**Previewing a limited number of records. Run the report to see everything.**

Course: Course Name	Course Duration	Total
Mathematics	Record Count	1
OOPS	Record Count	1
Physics	Record Count	1
<b>Total</b>	Record Count	3

**Details (3 Rows)**

Semester: Semester Name
1st sem
1st sem
1st sem
4

**Save Report**

**Report Name**  
Candidate Internal Report

**Report Unique Name**  
New Semesters with Course Report.cpt

**Report Description**

**Folder**  
Private Reports

**Save**

## 20. To View Report

1. Click on App Launcher on left side of screen.
2. Search **Candidate Internal Result Card** App & click on it.
3. Click on Reports Tab.
4. Click on **Candidate Internal Result Report** and see records.

The screenshot shows two browser windows. The top window displays a list of reports under the 'Candidate Internal ...' app. It includes columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report titled 'Candidate Internal Result Report' is selected, showing it was created by 'VAIBHAV WACHHARE' on '20/11/2023, 3:09 pm'. The bottom window shows a detailed view of the 'Candidate Internal Result Report' for 'Semesters with Course'. It displays a table with course details:

Course: Course Name	Course: Duration	Total
Mathematics	Record Count	1 1
ODDS	Record Count	1 1
Physics	Record Count	1 1
<b>Total</b>	<b>Record Count</b>	<b>2 2</b>

Below the table, there is a 'Details (3 Rows)' section with a dropdown menu for 'Semester: Semester Name' containing options: 1st Sem, 1st sem, 2nd sem, and 3rd sem.

## 21. Creating a Dashboard for Candidate Internal Result

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.

Student Dashboard Candidate Internal Result Report

https://bncoe-dev-ed-dev.lightning.force.com/lightning/r/report/0005f00000076A9EAT/view?queryScope=userFolders

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

Search... Enable Field Editing Add Chart Edit

Q CA Candidate Internal Result Card

Items

	Total
Appointment Categories	1
Calendar	1
Campaigns	1
Candidates	1
Card Payment Methods	3
<a href="#">View More</a>	3

Details (3 Rows) Click an intersection in the table above to filter details.

Semester: Semester Name
1 1st sem
2 1st sem
3 1st sem
4

https://bncoe-dev-ed-dev.lightning.force.com/lightning/app/0Gm5h000002mD1RAAE.htm

Student Dashboard Dashboards | Salesforce

https://bncoe-dev-ed-dev.lightning.force.com/lightning/o/Dashboard/home?queryScope=mrn

Shanes Tools Exercises | Late Vari... Google Torrent Search Eng... Telecom I Co.Ltd. Uudem | Uudem DRDO ENTRY TEST... Online shopping sit... Micromouse Applicant Login All Bookmarks

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

Search... New Dashboard New Folder

Dashboards Recent 1 item

DASHBOARDS Recent

- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS All Folders

- Created by Me
- Shared with Me

FAVORITES All Favorites

Recent dashboards appear here Go to All Dashboards to see what's available. View All Dashboards

New Dashboard

Name Candidate Internal Result Card

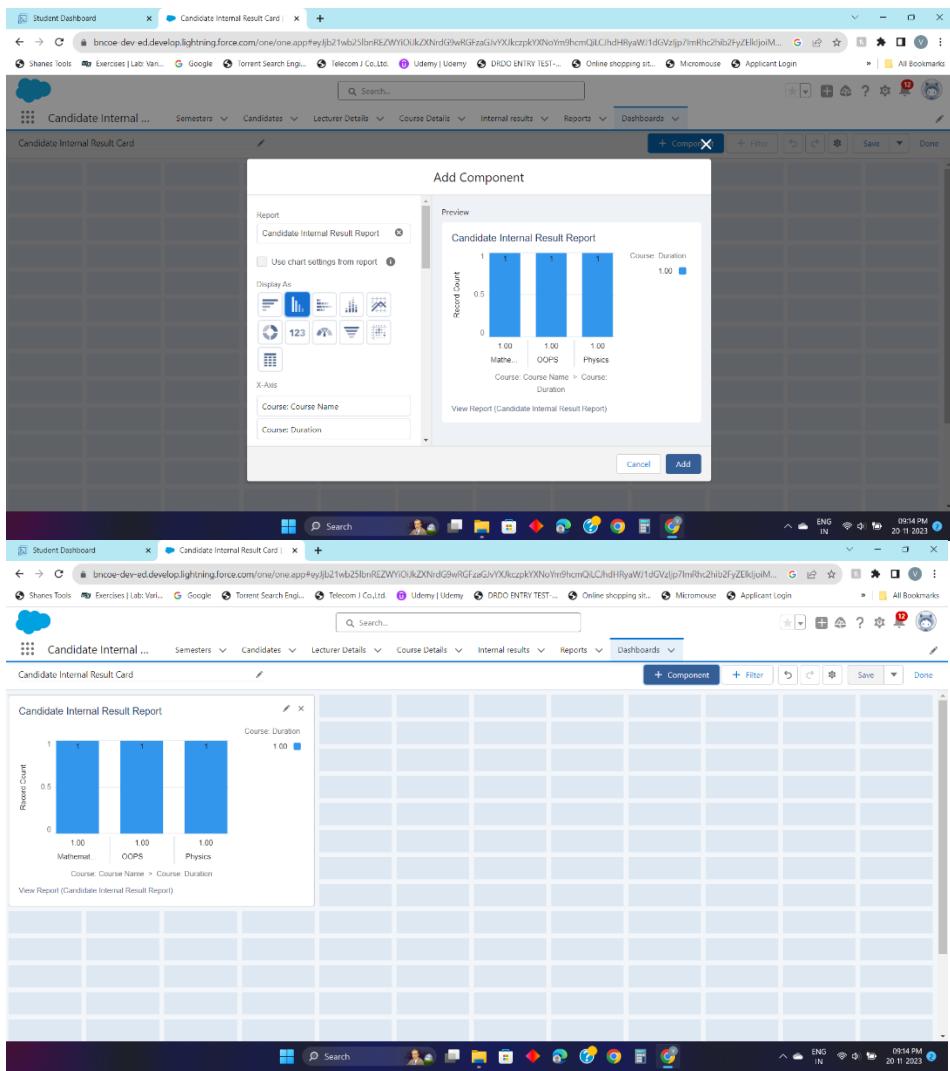
Description

Folder Private Dashboards Select Folder

Create

The screenshot displays a web application interface for managing student results. At the top, there is a navigation bar with links for 'Student Dashboard', 'Candidate Internal Result Card', 'Semesters', 'Candidates', 'Lecturer Details', 'Course Details', 'Internal results', 'Reports', and 'Dashboards'. Below the navigation bar is a search bar labeled 'Search...'. The main area features a large grid table with multiple rows and columns, representing the list of candidate internal result cards. To the right of the grid, there are several buttons: '+ Component', '+ Filter', 'Save', and 'Done'. A status bar at the bottom shows the time as '09:11 PM' and the date as '20/11/2023'.

A second window titled 'Select Report' is overlaid on the main grid. This modal has a sidebar on the left with sections for 'Recent' (which includes 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports') and 'Folders' (which includes 'Created by Me' and 'Shared with Me'). The main content area shows a list of reports with a search bar at the top. One item is listed: 'Candidate Internal Result Report' created by 'VALBHAV WADHWA' on '20-Nov-2023, 9:09 pm - Private Reports'. At the bottom of the modal are 'Cancel' and 'Select' buttons.



## 22. To 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 screenshots show the creation and preview of a Salesforce dashboard named 'Candidate Internal Result Card'. The dashboard includes a bar chart titled 'Candidate Internal Result Report' showing scores for Mathematics, OOPS, and Physics.

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Candidate Internal Result Card	Private Dashboards	VAIBHAV WAGHMARE	20/11/2023, 9:13 pm		

**Candidate Internal Result Report**

Course: Course Name > Course: Duration

Mathematics: 1.00  
OOPS: 1.00  
Physics: 1.00

## 23. Create A Screen Flow

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow
4. It will open the canvas. Select (+)
5. Select the screen element from the drop down.
6. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label: Candidate info

API Name: Candidate\_Info (This field will be auto populated.)

7. In search Component type text and drag the text component to canva and give the label and Api Name
8. Select (+)
9. In search bar search for Create records and select the create records
10. It will open you the details section and give the label as follows:

Label: Create candidate Records

API Name: Create\_candidate\_Records

Then check the use separate resources and literal values

## Search for candidate Object

11. Under field type name and select the name and select the candidate\_name under Screen Component.

12. Click on Done

13. Click on Save. It will open you details canva and give the details as follows.

Flow label: Candidate flow

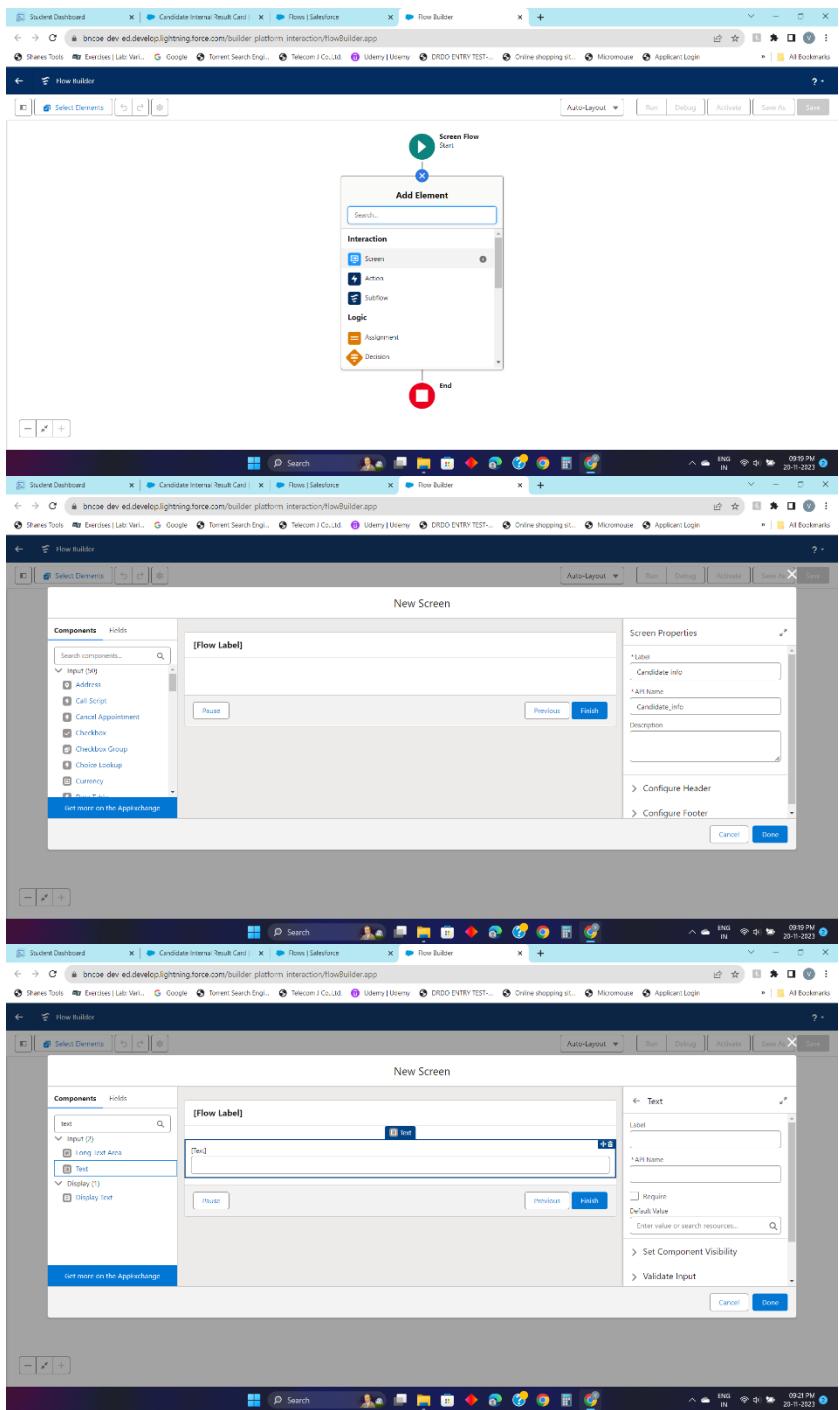
Flow API Name: Candidate\_flow(this will be auto populated)

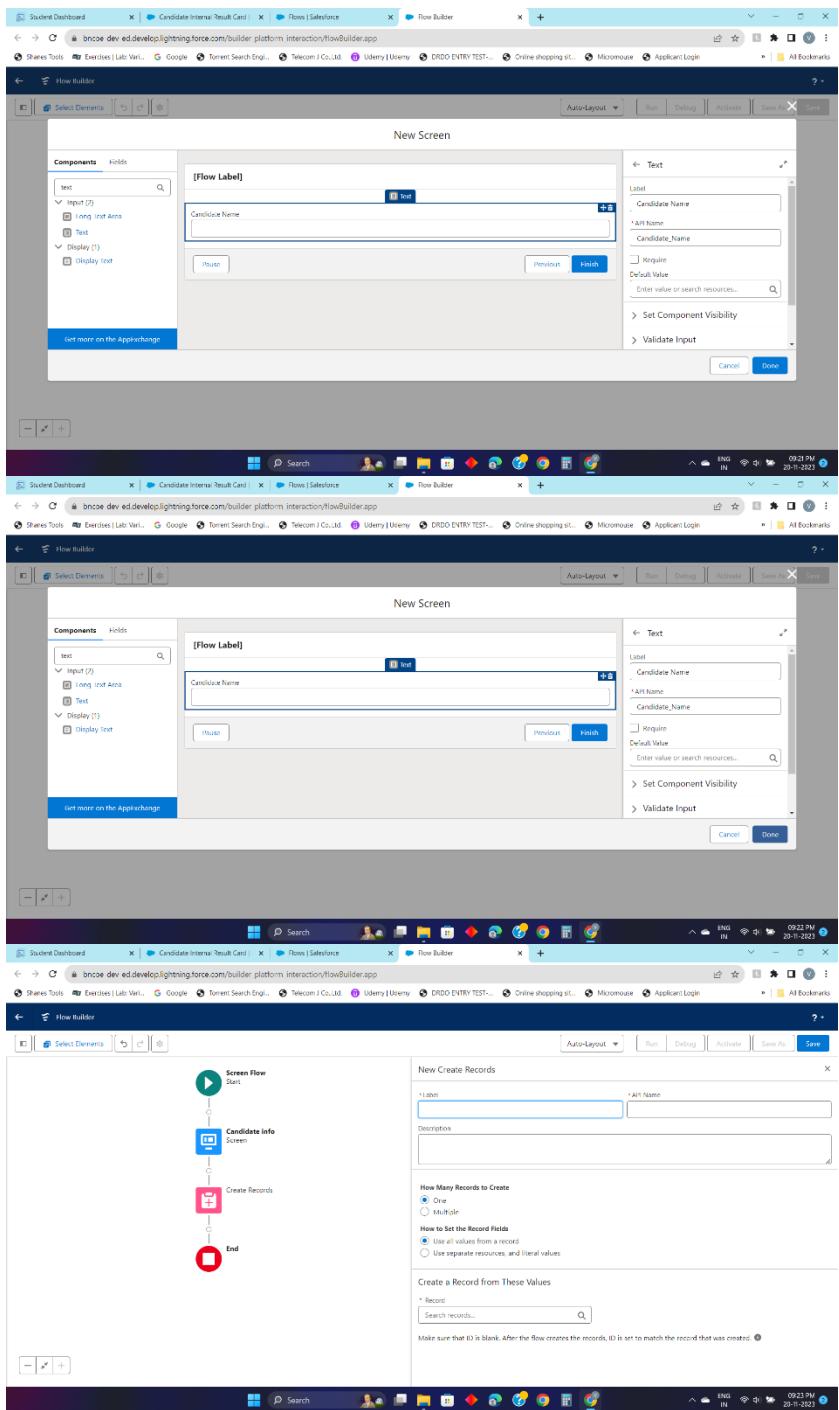
14. Click on save

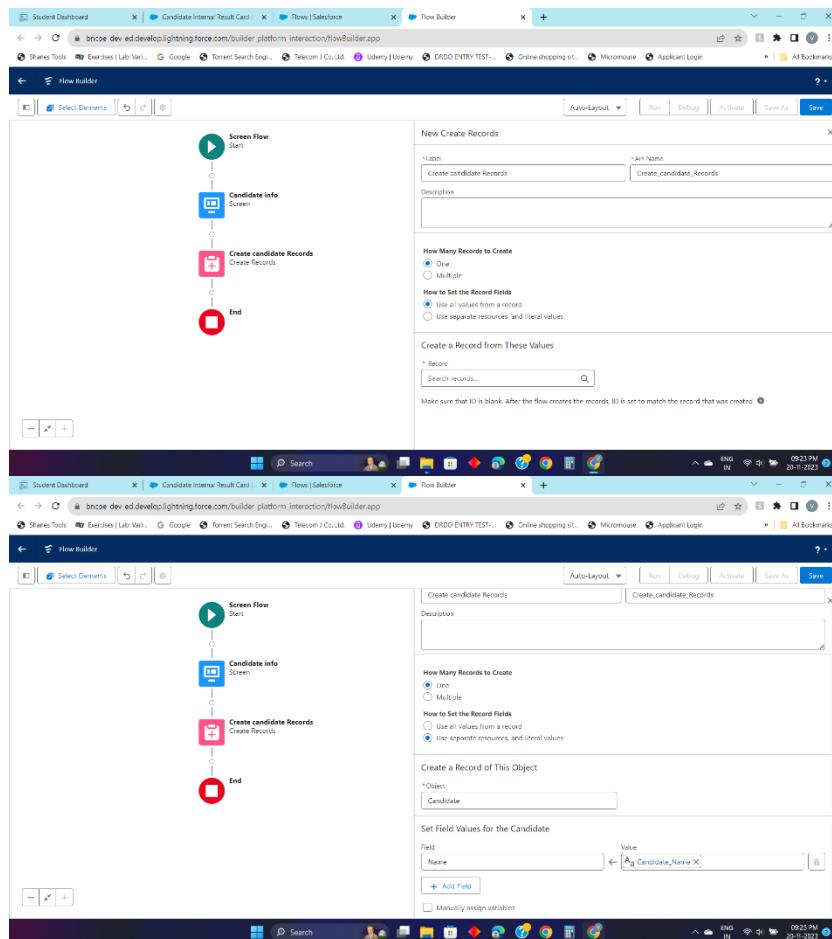
15. Click on the Activate.

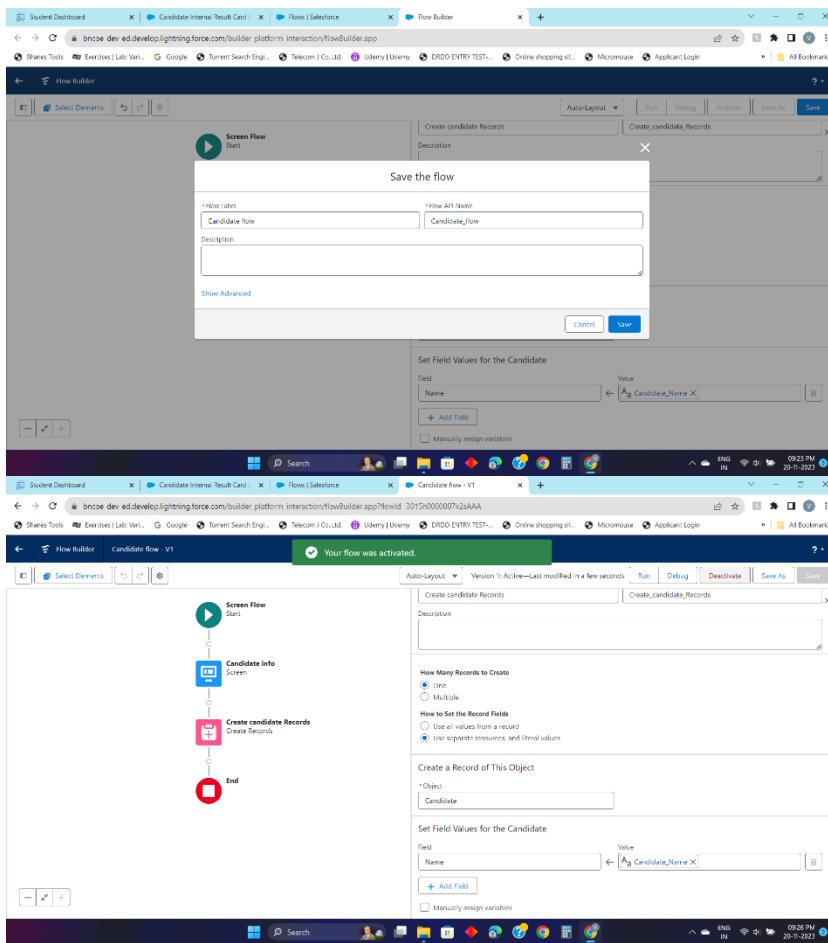
The image consists of three vertically stacked screenshots of the Salesforce Setup Home page, specifically the Flow Builder interface.

- Screenshot 1:** Shows the "Flows" section of the Setup Home. It features a "Get Started with Einstein Bots" card, a "Mobile Publisher" card, and a "Real-time Collaborative Docs" card. Below these cards is a "Most Recently Used" section with a table showing 10 items. The table has columns for NAME, TYPE, and OBJECT.
- Screenshot 2:** Shows the "All Flows" list in the Flow Builder. The table lists various flows such as "Basic Approval Request", "Book Appointment from Invitation", "Cancel Item Flow", etc., each with columns for Flow Label, Process Type, Active, Template, Package State, Packag..., Last Modified, and Last Run.
- Screenshot 3:** Shows the "New Flow" creation screen. The "Core" tab is selected in the toolbox. It displays several flow types: "Screen Flow", "Record-Triggered Flow", "Schedule-Triggered Flow", "Platform Event—Triggered Flow", and "Autolaunched Flow (No Trigger)". Each flow type has a brief description and a "Create" button.









## 24. Creation Of App Page

App page descriptions in Salesforce refer to the metadata and configuration settings that define the visual layout, functionality, and behavior of custom app pages within a Salesforce org. App pages are created using the Salesforce App Builder, which is a visual drag-and-drop tool that allows users to create custom pages without writing code.

### Create App Page

1. Click on the Gear icon and select set up.
2. In Quick Find Box . Type app Builder and select the lightning app builder
3. Select New
4. Select the App page and click on Next
5. Give the label Name.  
Label Name: Candidate App page.
6. Select the one region and click on finish.
7. Type the flow in the search bar and select the flow component and drag the component to the Add components here.
8. After dragging the component, give the flow label in the flow search and then click on save and then click on activate.  
Flow label: Candidate flow
9. After clicking on the activate it will open a page and then select the lightning experience and select the app and then click on add page to the app.

Three screenshots of the Salesforce Lightning App Builder interface.

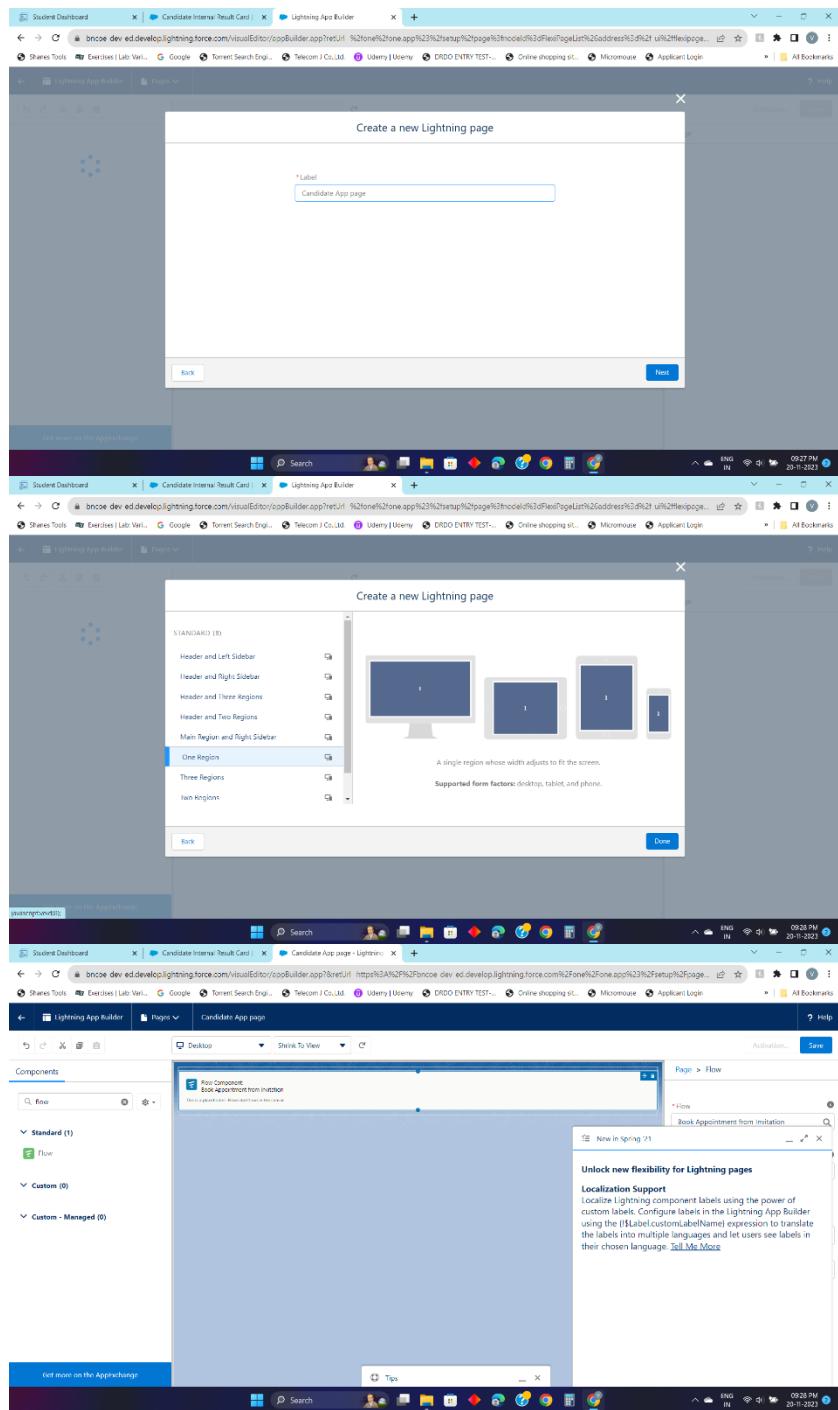
The first two screenshots show the "Lightning App Builder" page, which lists "Lightning Pages". The third screenshot shows the "Create a new Lightning page" dialog.

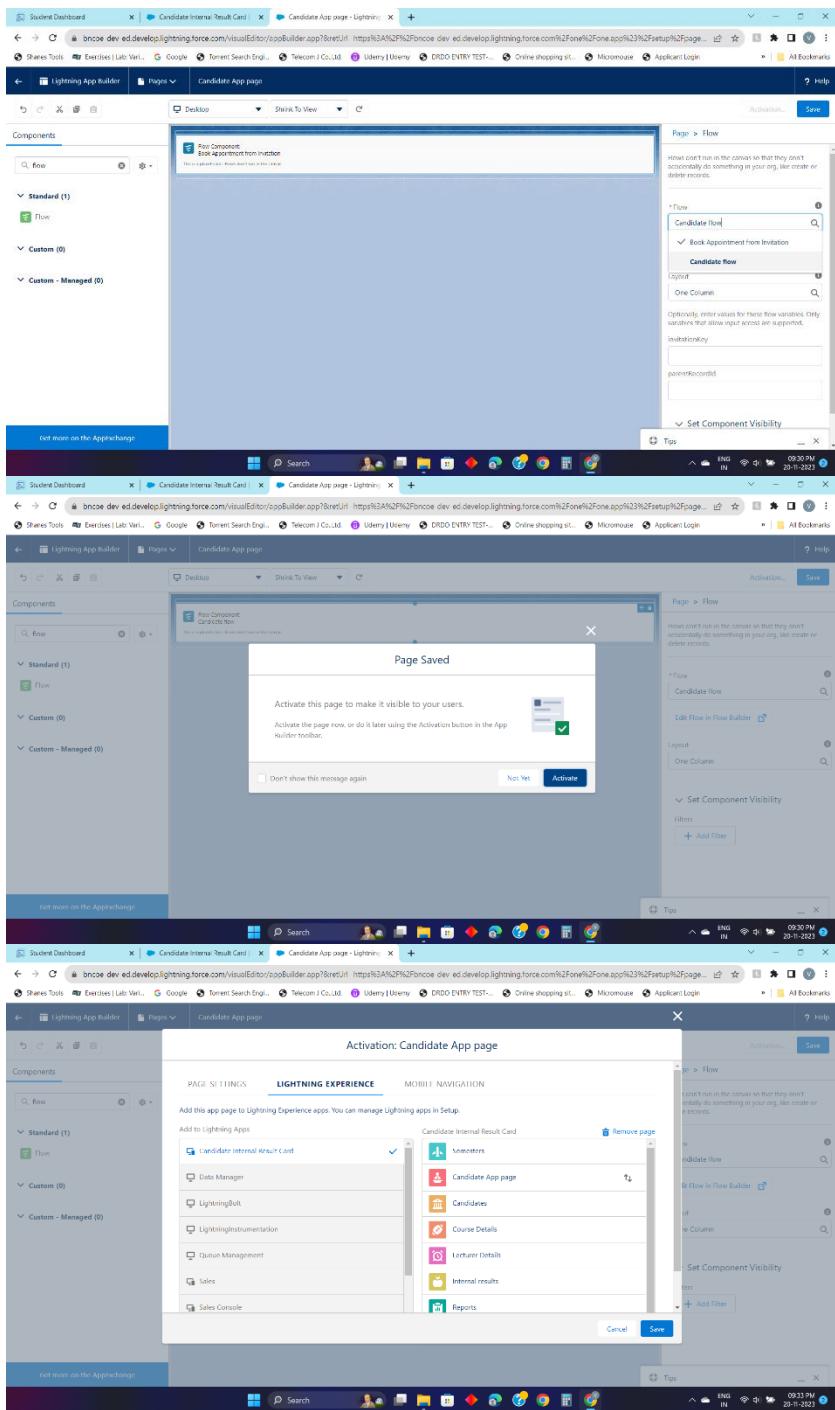
**Screenshot 1:** Shows the "Lightning App Builder" page with a table of "Lightning Pages".

Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
There are no Lightning pages currently created for your organization meeting this filter criteria.						

**Screenshot 2:** Shows the same "Lightning App Builder" page as the first screenshot.

**Screenshot 3:** Shows the "Create a new Lightning page" dialog. The left sidebar shows "App Page" selected, with sub-options: Home Page, Record Page, Embedded Service Page, and Voice Extension. The main area displays a preview of a mobile app screen with a circular chart showing "1.8M" and a "Sales by Stage" section. A sidebar on the right shows "Recent Items (20)".





## 25. Triggers

A trigger refers to an Apex code that is automatically executed before or after certain events occur in the Salesforce platform, such as when a record is inserted, updated, deleted, or undeleted. Triggers are used to automate business processes, enforce data integrity, and perform custom logic on data.

### Field Update Using Trigger

Whenever a internal Marks is inserted if the marks is greater than or equal to 35 it must update the status field to Pass or else it must update to fail

1. Go to the gear icon and select the developer console.
2. From the menu bar click on file and select Apex class.
3. Now give the class name as InternalmarksHandler
4. Now Write the below code

```
public class InternalmarksHandler {  
    public static void beforeinsert(list<Internal_result__c> newlist){  
  
        for(Internal_result__c internalmarks : newlist){  
            if(internalmarks.marks__c >= 35){  
                internalmarks.status__c = 'Pass';  
            }else{  
                internalmarks.status__c='fail';  
            }  
        }  
    }  
}
```

5. From the menu bar click on file and select Apex trigger.
6. Now give the trigger name as Internalmarks
7. Now write the below code

```
trigger Internalmarks on Internal_result__c(before insert,after update) {  
    If(trigger.isInsert)  
    {  
        If(trigger.isBefore)  
        {  
            InternalmarksHandler.beforeinsert(Trigger.new);  
        }  
    }  
}
```

#### **SUBMITTED TO:**

**Our Sincere thanks to**

**->SALESFORCE**

**->SMARTBRIDGE(Smart Internz)**

**THANK YOU**