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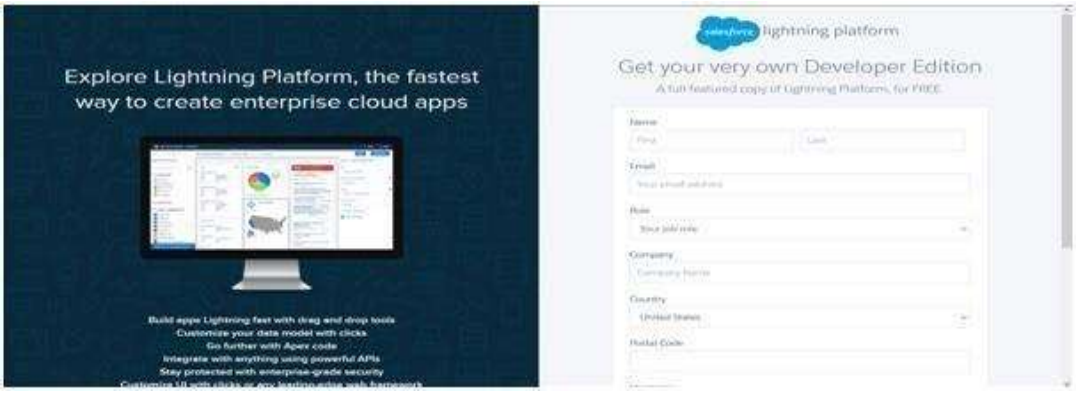
Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/Sign up
2. Click on sign up.
3. On the sign-up form, enter the following details:
    1. First name & Last name
    2. Email
    3. Role: Developer
    4. Company: College Name
    5. County: India
    6. Postal Code: pin code
    7. Username: should be a combination of your name and company

    This need not be an actual email id, you can give anything in the format: username@organization.com

Click on sign up after filling these.



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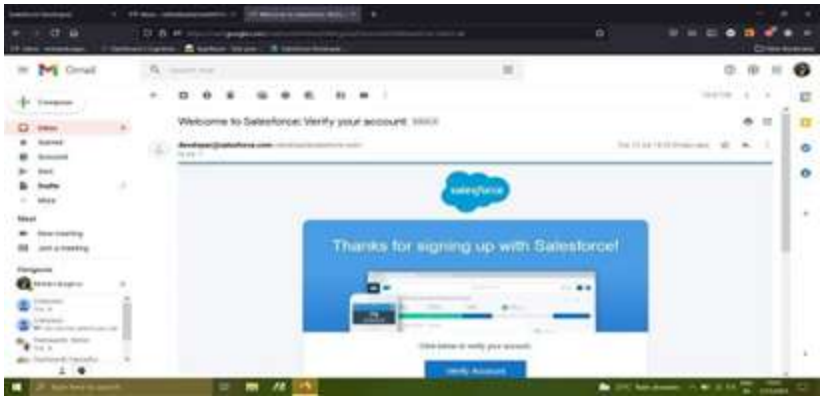
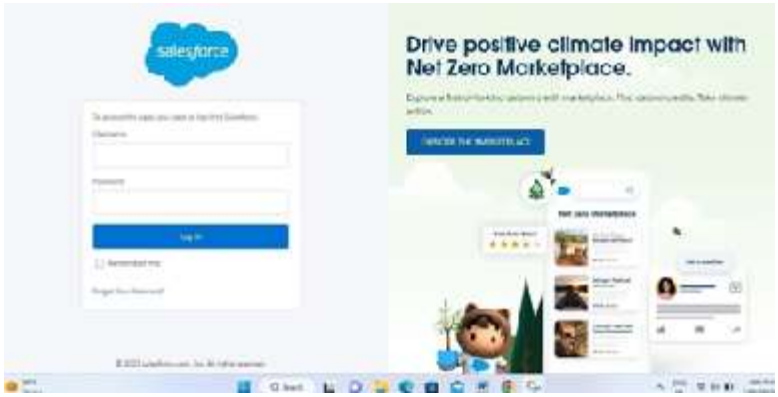
Account Activation

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.



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https://login.salesforce.com

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Salesforce Login htttps://login.salesforce.com

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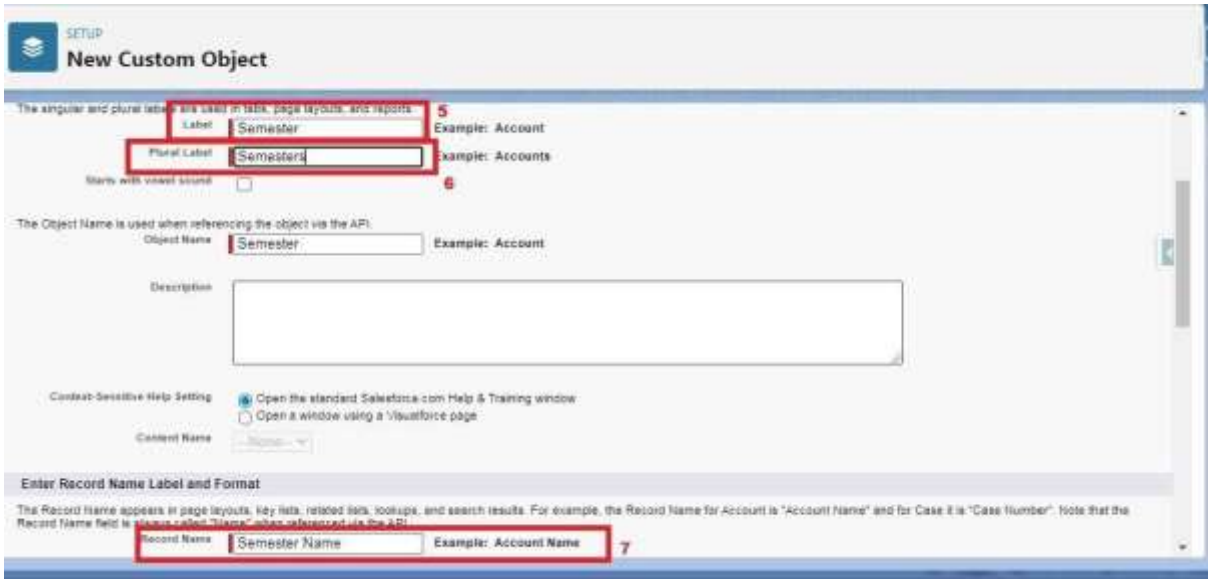
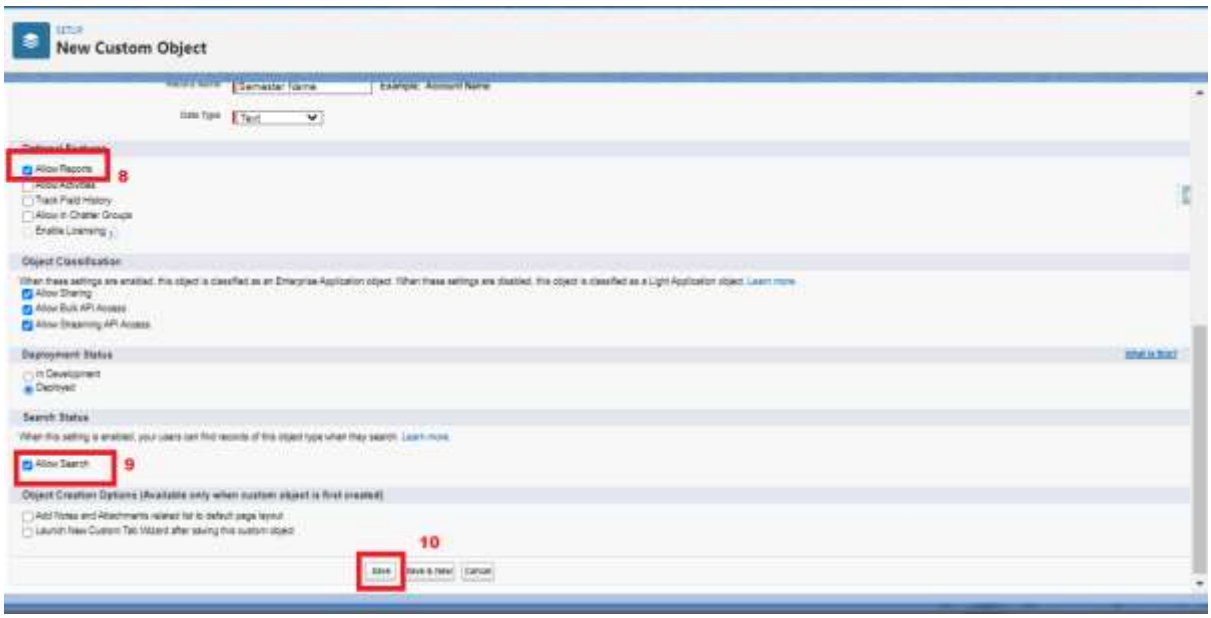
Creation Of Semester Object For Candidate Internal Result Card

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 Dropdownclick 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.

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





- **Org**
  - **Creating Developer Org**
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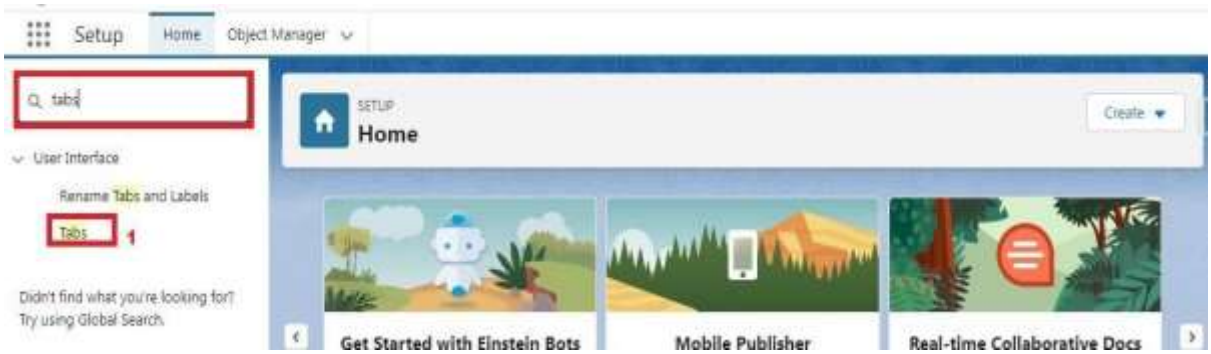
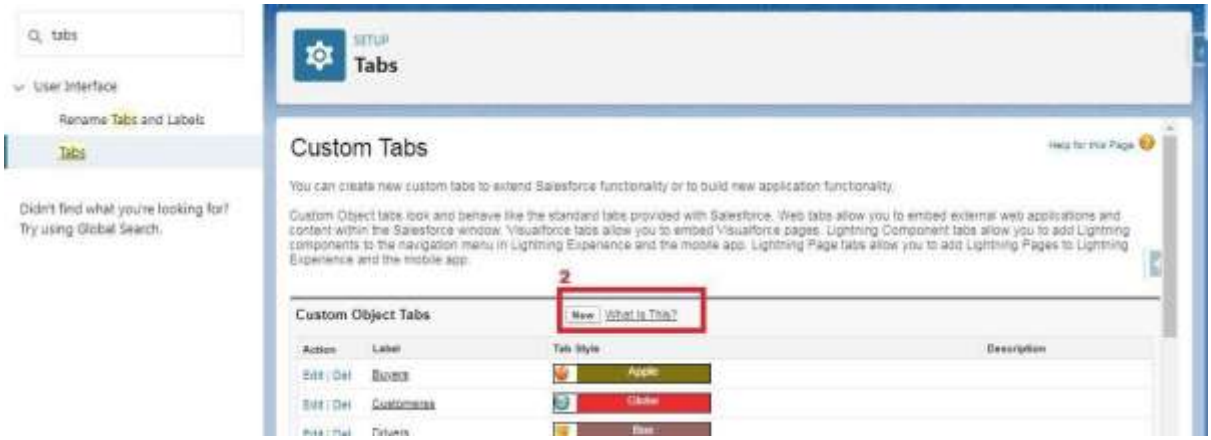
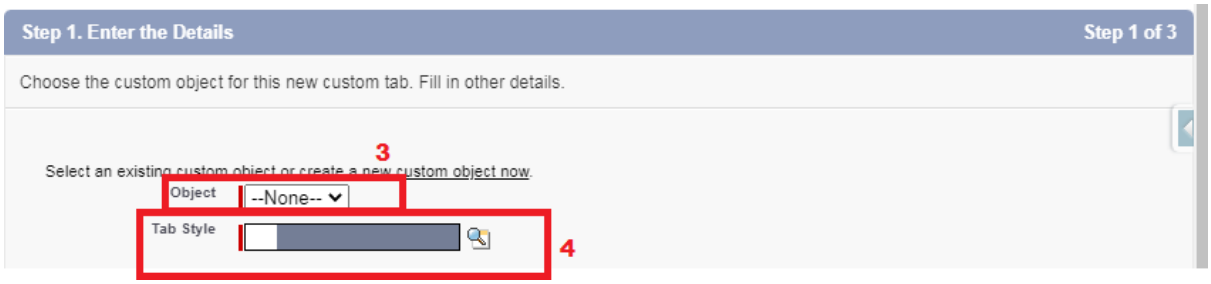
Creation Of Semester Tab For Candidate Internal Result Card

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 .







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Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as aunit. 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.

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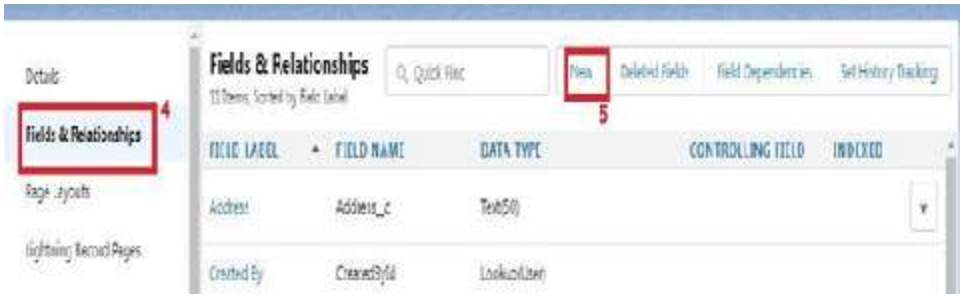
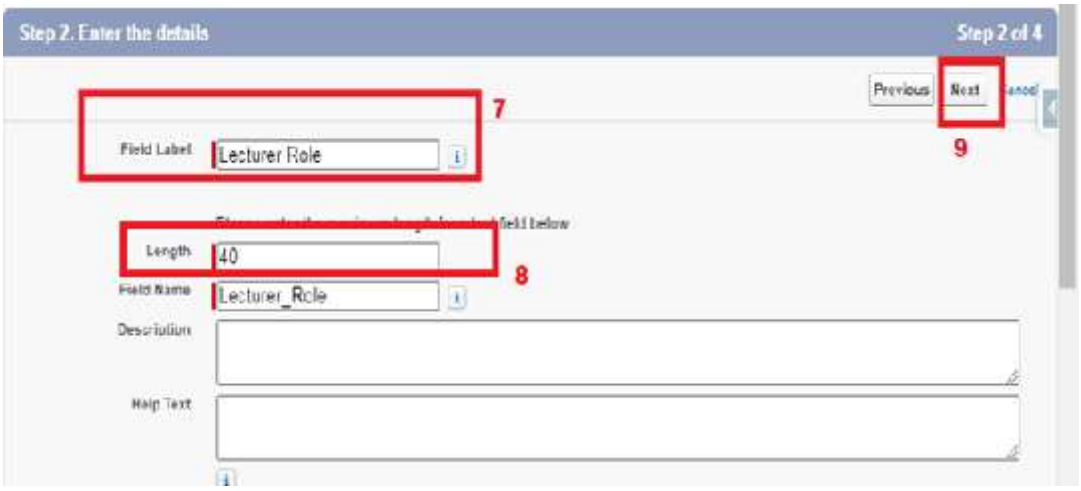
Creation Of Text Field On "Lecturer Details" & Look Up Field For The “Candidate” Object

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.

Search Setup
Setup
Home
Object Manager
1
2
SETUP
Object Manager
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Lecturer Details
Lecturer_Details__c
Custom Object
08/04/2023
3

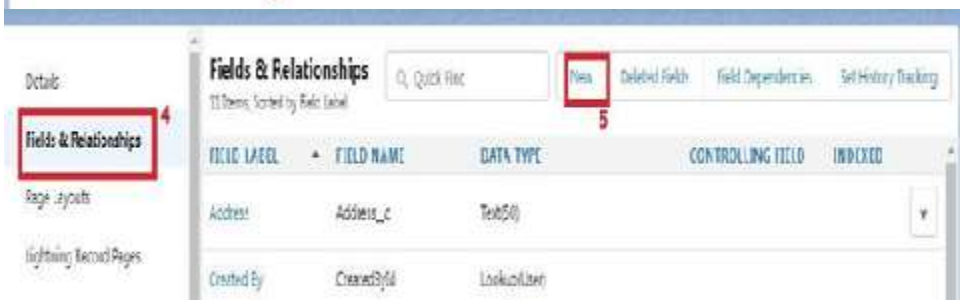

Details
Fields & Relationships
4
Page Layouts
Lightning Record Pages
Fields & Relationships
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
5
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address__c
Text(50)
Created By
CreatedById
Lookup(User)

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 255 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, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" 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
Previous
Next
Cancel
7
Field Label
Lecturer Role
9
Length
40
8
Field Name
Lecturer_Role
Description
Help Text

Now Let’s create a Lookup field on candidate object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the lookup as the Data Type, then click Next.
7. In related select Semester
8. For Field Label Semester Name, enter.
9. Click Next, Next, then Save & New.



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

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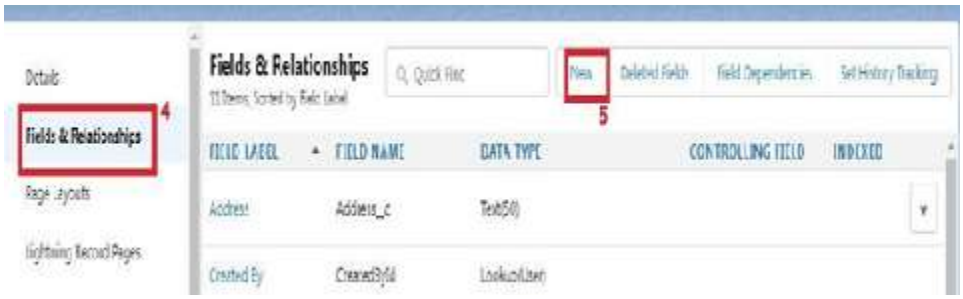
Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

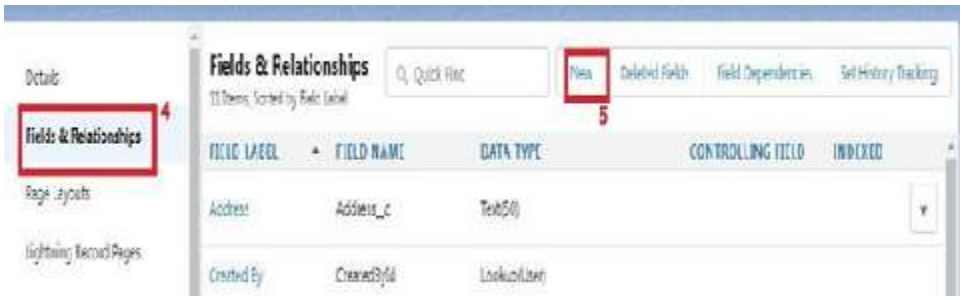
Let's create a Number field on Course Details object
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next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

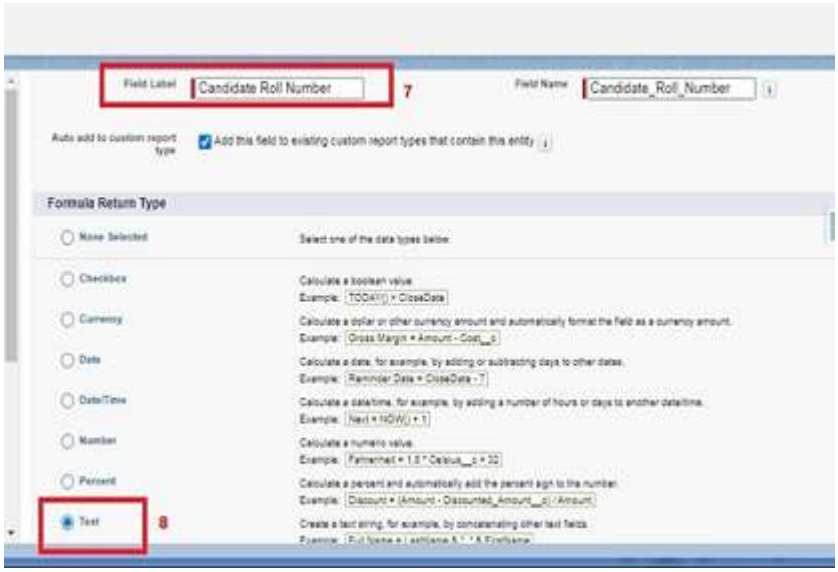


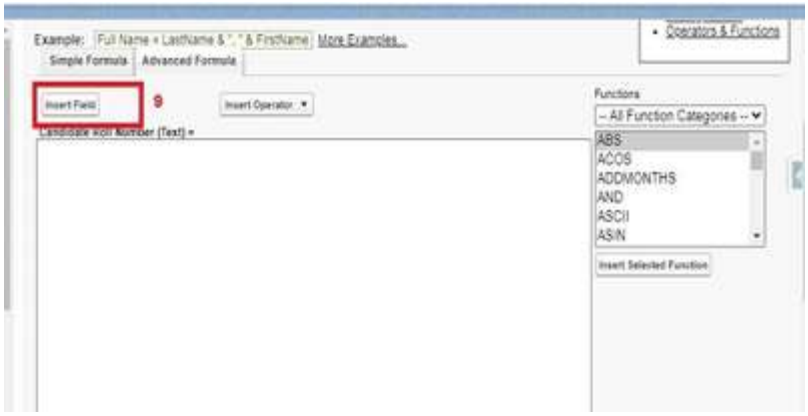
Now Let's create a Formula field on Internal Results object

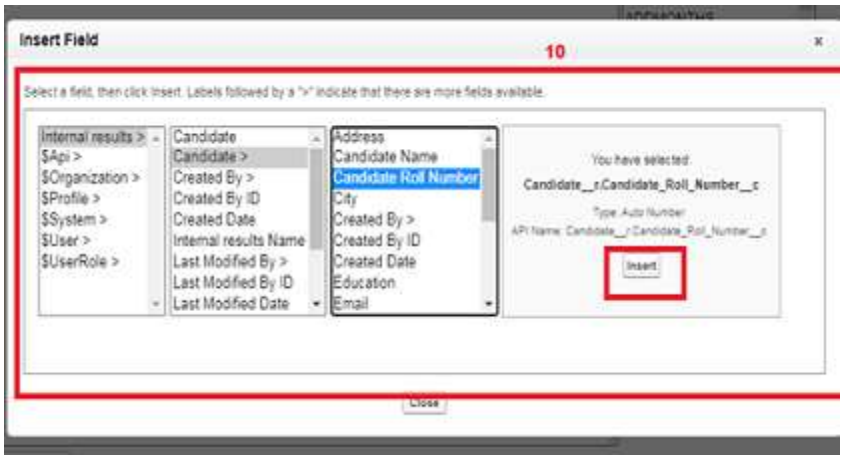
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Internal results.

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.

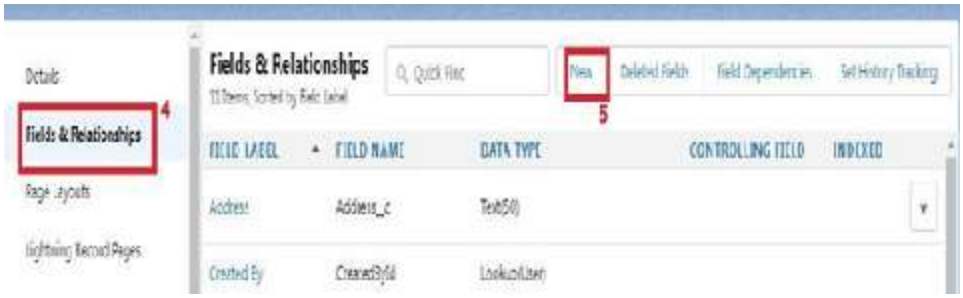


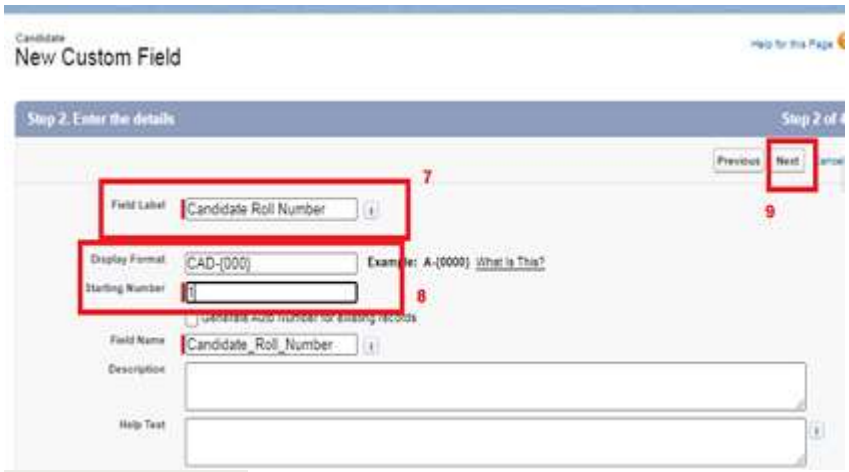






Now Let's create an auto number field on Candidate object
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the 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.





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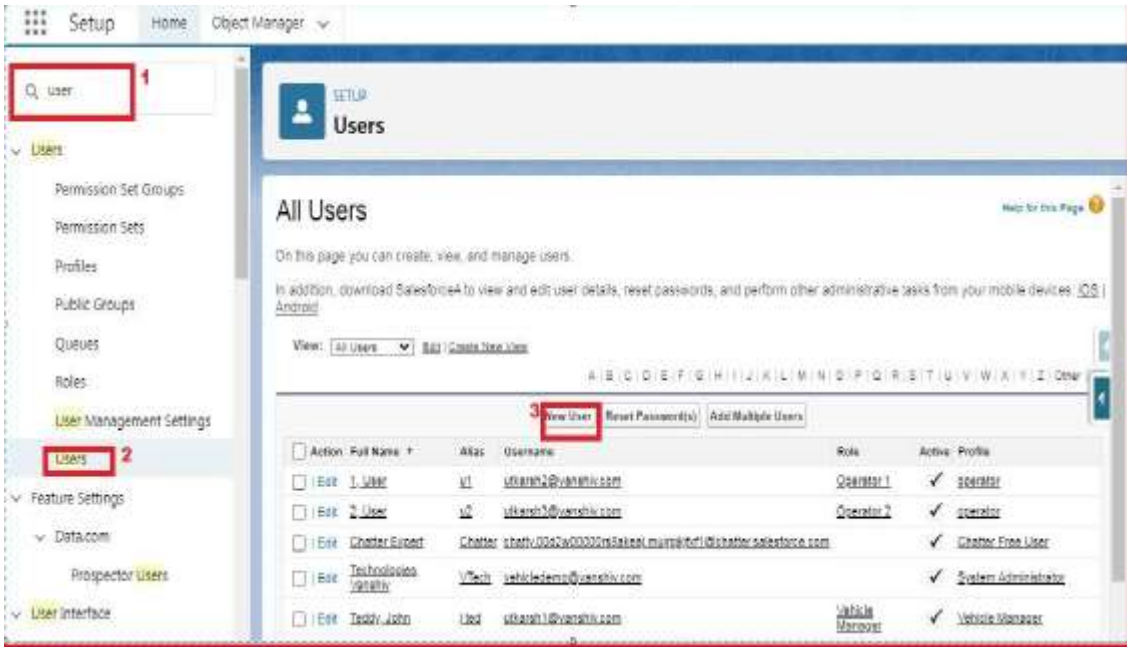
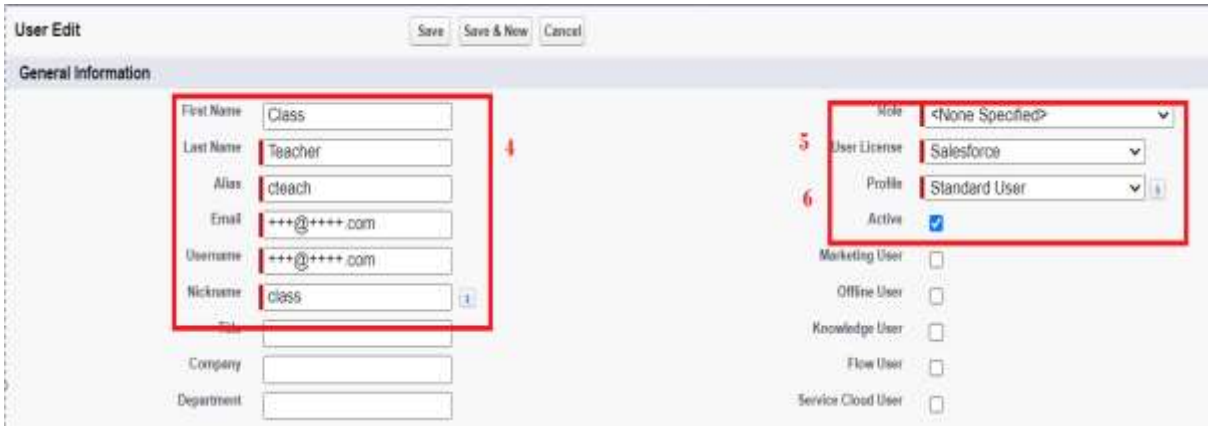
Creating A User

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 anda 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.





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    - **View Record (Course Details)**
    - **Delete Record (Course Details)**
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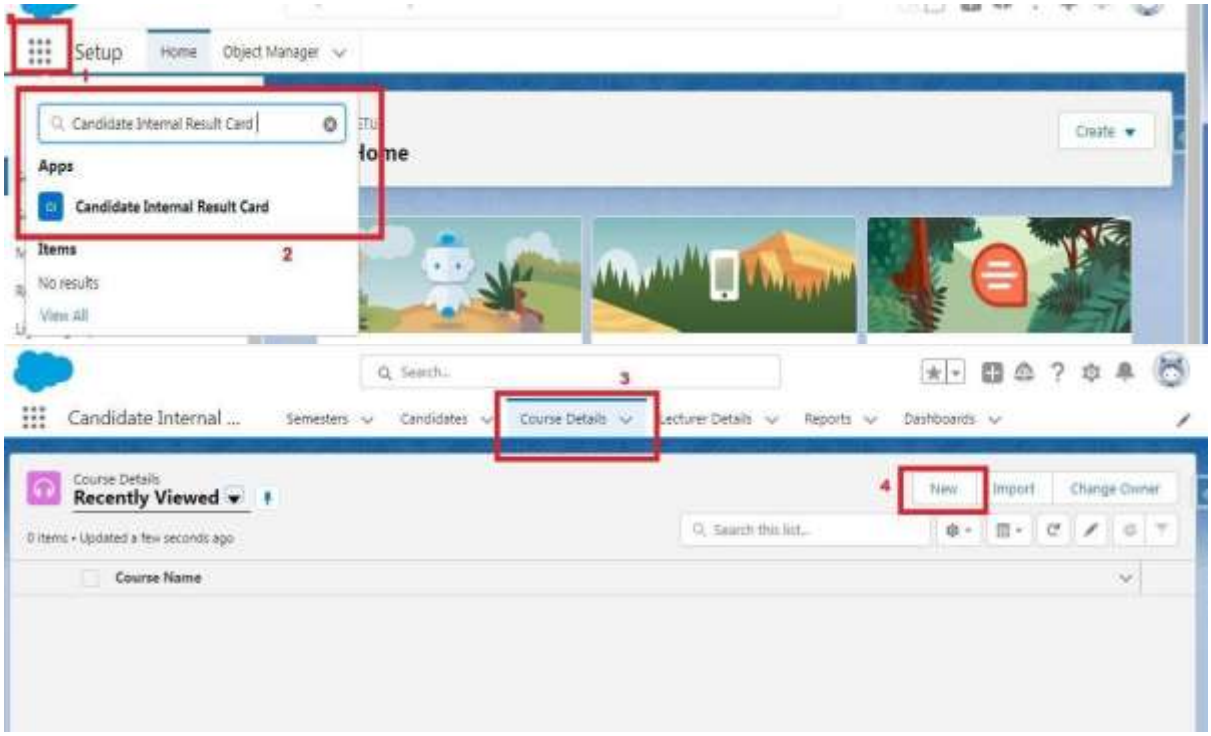
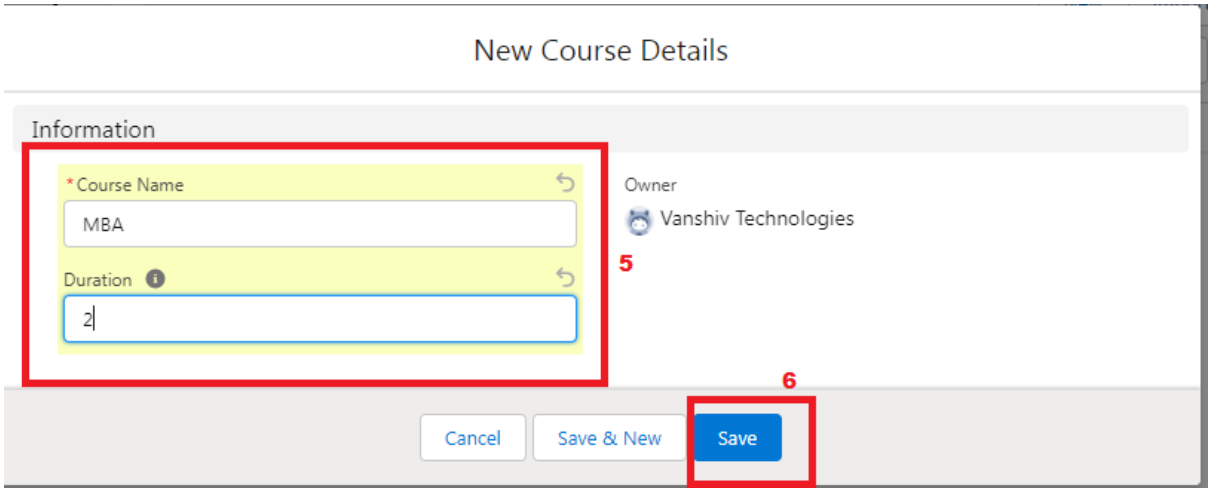
Create Record (Course Details)

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.





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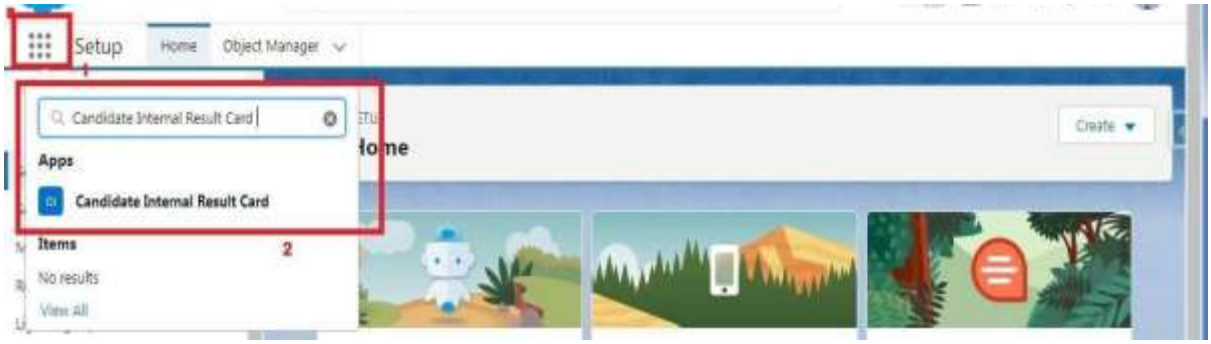
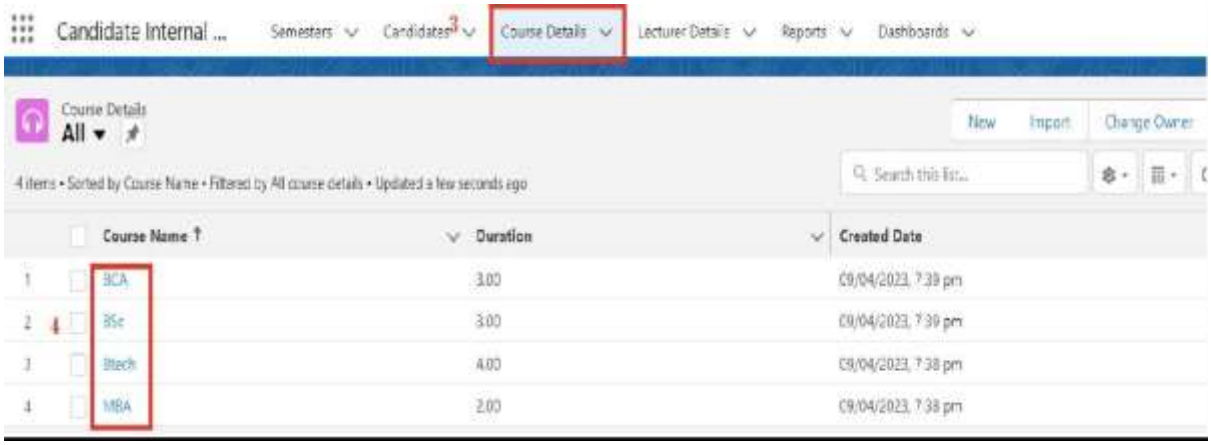
- 



        - **Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object**
    - **Users**
        - **Creating A User**
    - **User Adoption**
        - **Create Record (Course Details)**
        - **View Record (Course Details)**
        - **Delete Record (Course Details)**
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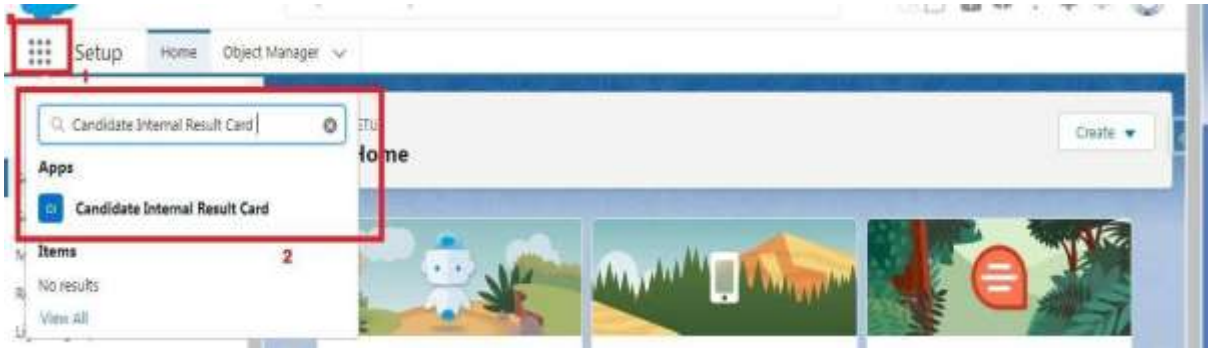
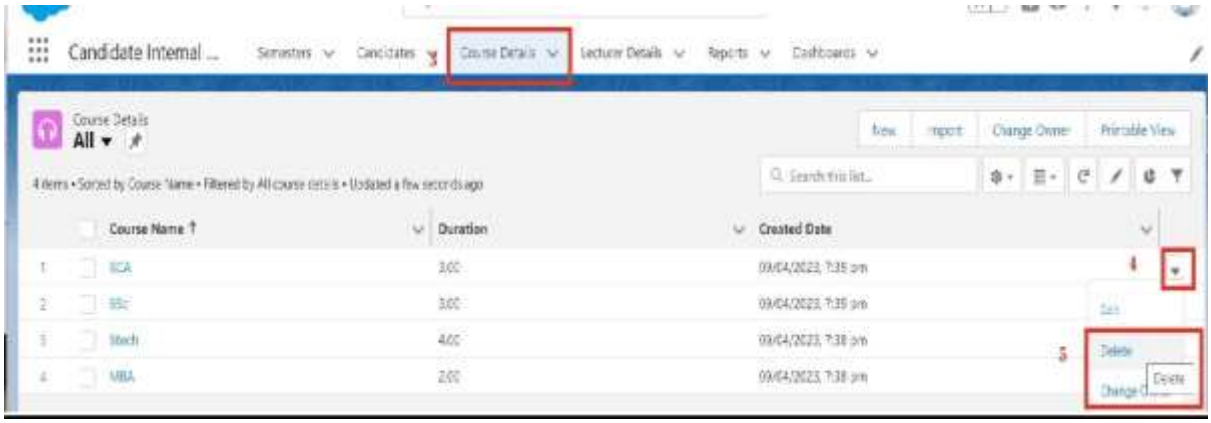
Delete Record (Course Details)

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.





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        - **View Record (Course Details)**
        - **Delete Record (Course Details)**
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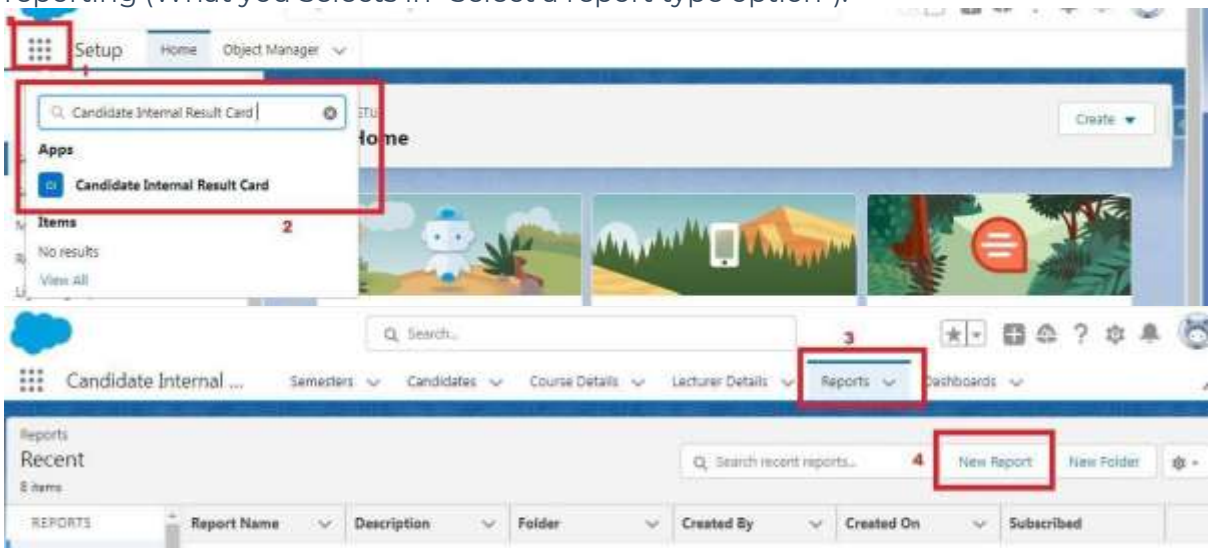
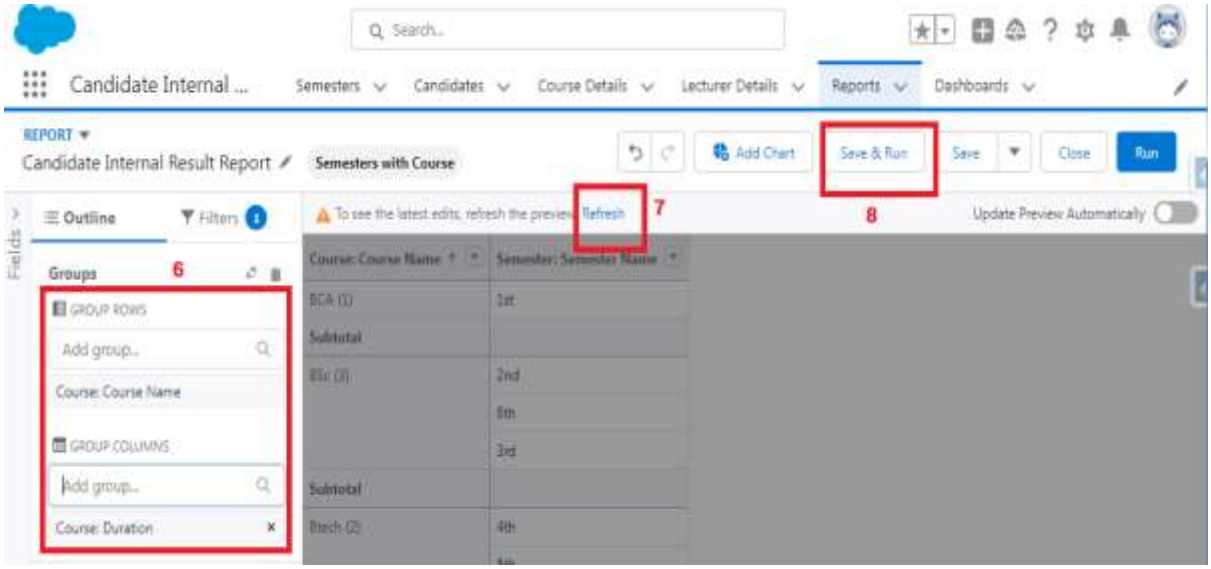
        - **Create Report**
        - **View Report**
    - **Dashboards**

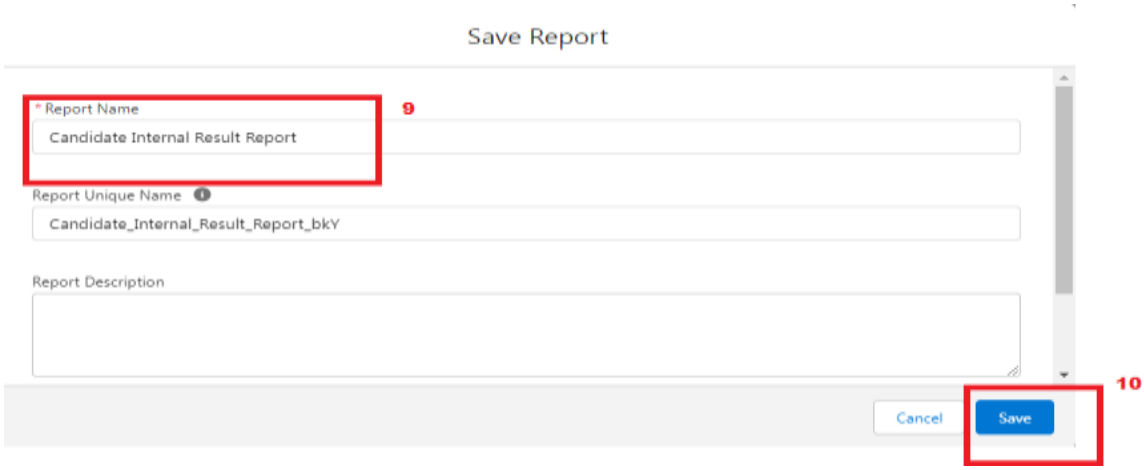
Create Report

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”).

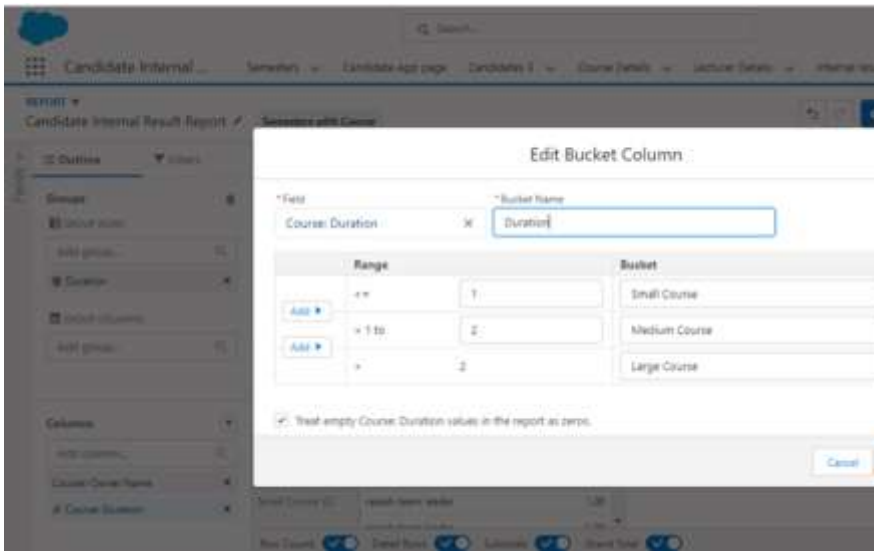






1. On the report builder page, locate the "Fields" pane on the left-hand side.
2. Find the field for which you want to create a bucket field and drag it to the report preview section.
3. Click on the field in the report preview to open the field properties.
4. In the field properties, locate the "Summarize" 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.



Toggle navigation

- **Implementing CRM For Result Tracking Of A Candidate With Internal Marks - (ADMIN)**
  - **Create Salesforce Org**
    - **Creating Developer Org**
    - **Account Activation**

- **Object**
  - **Creation Of Semester Object For Candidate Internal Result Card**
- **What Is A Tab?**
  - **Creation Of Semester Tab For Candidate Internal Result Card**
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- **Fields And Relationship**
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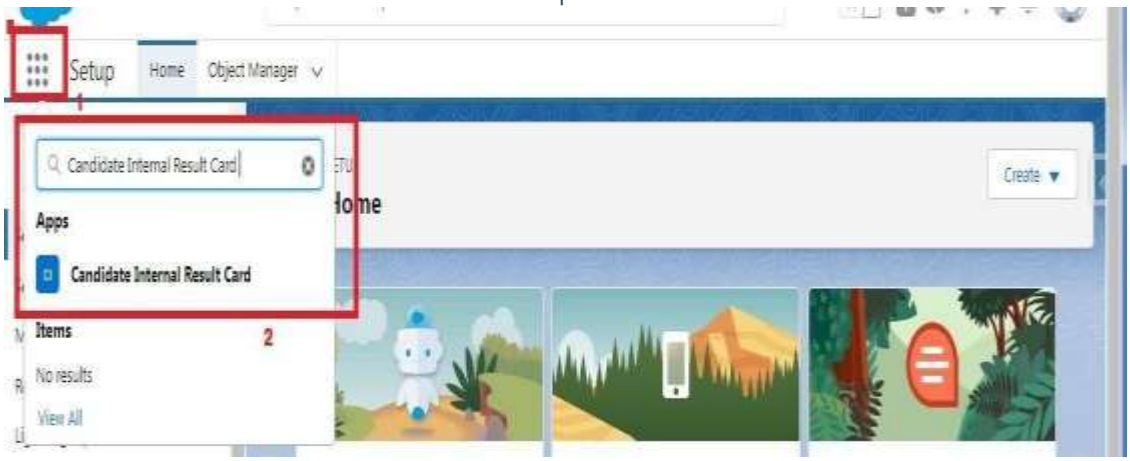
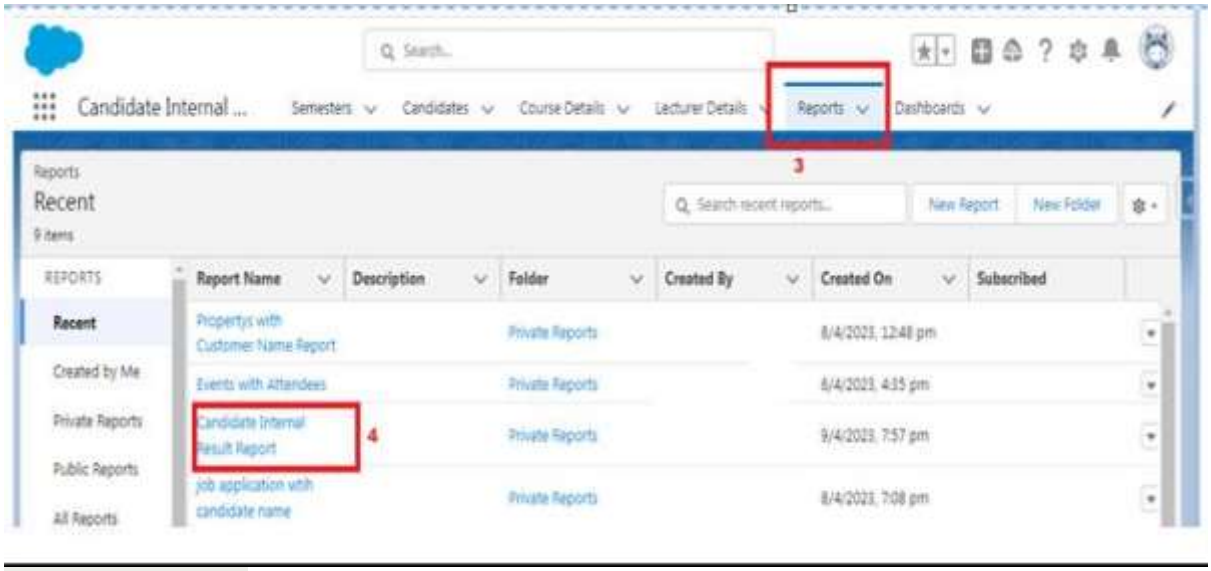
- **User Adoption**
  - **Create Record (Course Details)**
  - **View Record (Course Details)**
  - **Delete Record (Course Details)**
- **What Are Reports?**
  - **Create Report**
  - **View Report**
- **Dashboards**

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.





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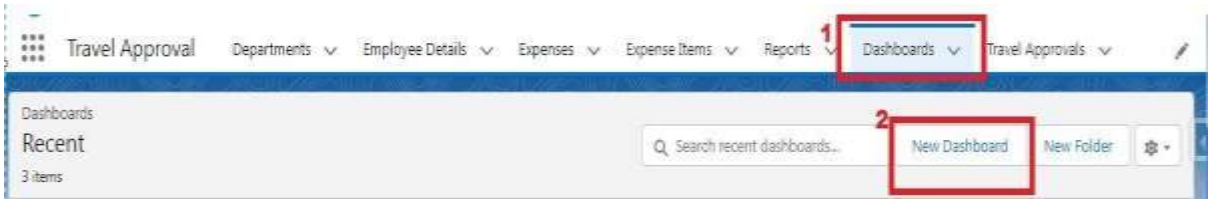
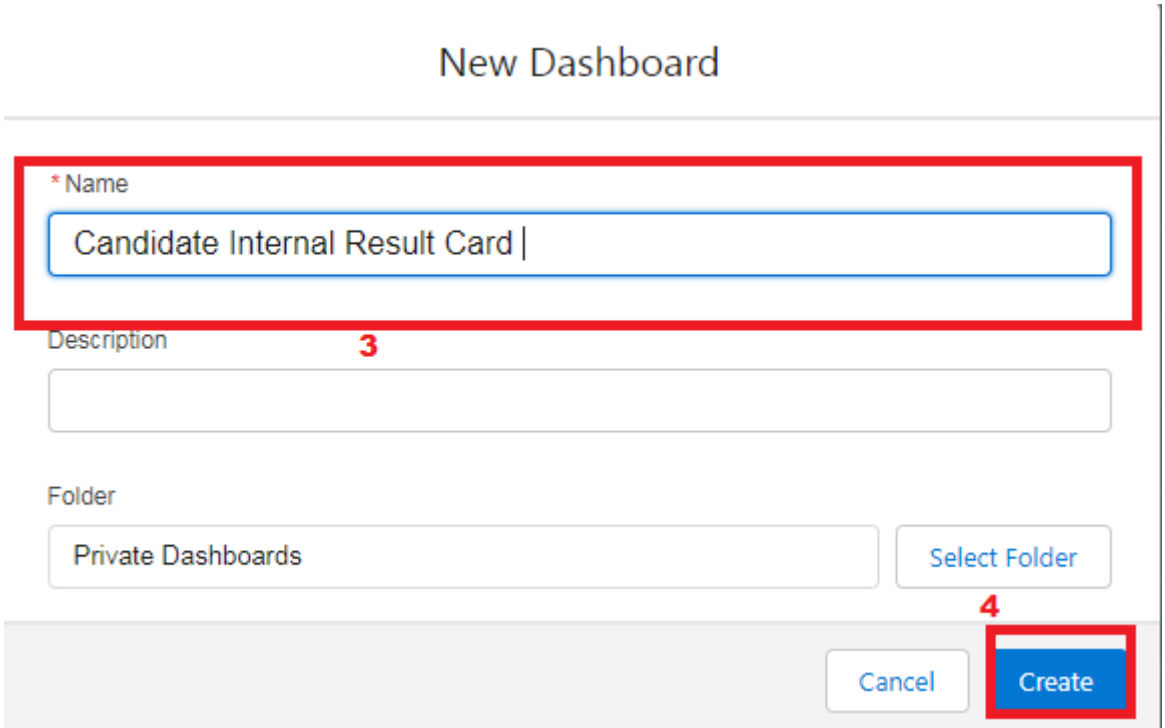
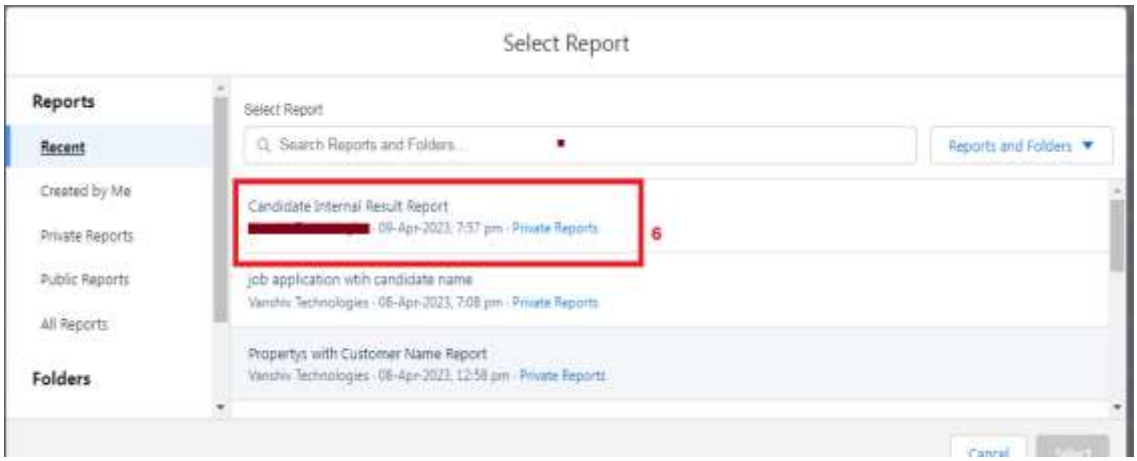
Create Dashboard

1. Click on Dashboards tab from the Candidate Internal Result Card application.
2. Click on new dashboard.
3. Give name- Candidate Internal Result Card
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Candidate Internal Result Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.




New Dashboard
* Name
Candidate Internal Result Card
Description
3
Folder
Private Dashboards
Select Folder
4
Cancel
Create

Search...
Travel Approval
Departments
Employee Details
Expenses
Expense Items
Reports
Dashboards
Travel Approvals
Employee Travel detail
5
+ Component
Filter
Save
Done


Select Report
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Recent
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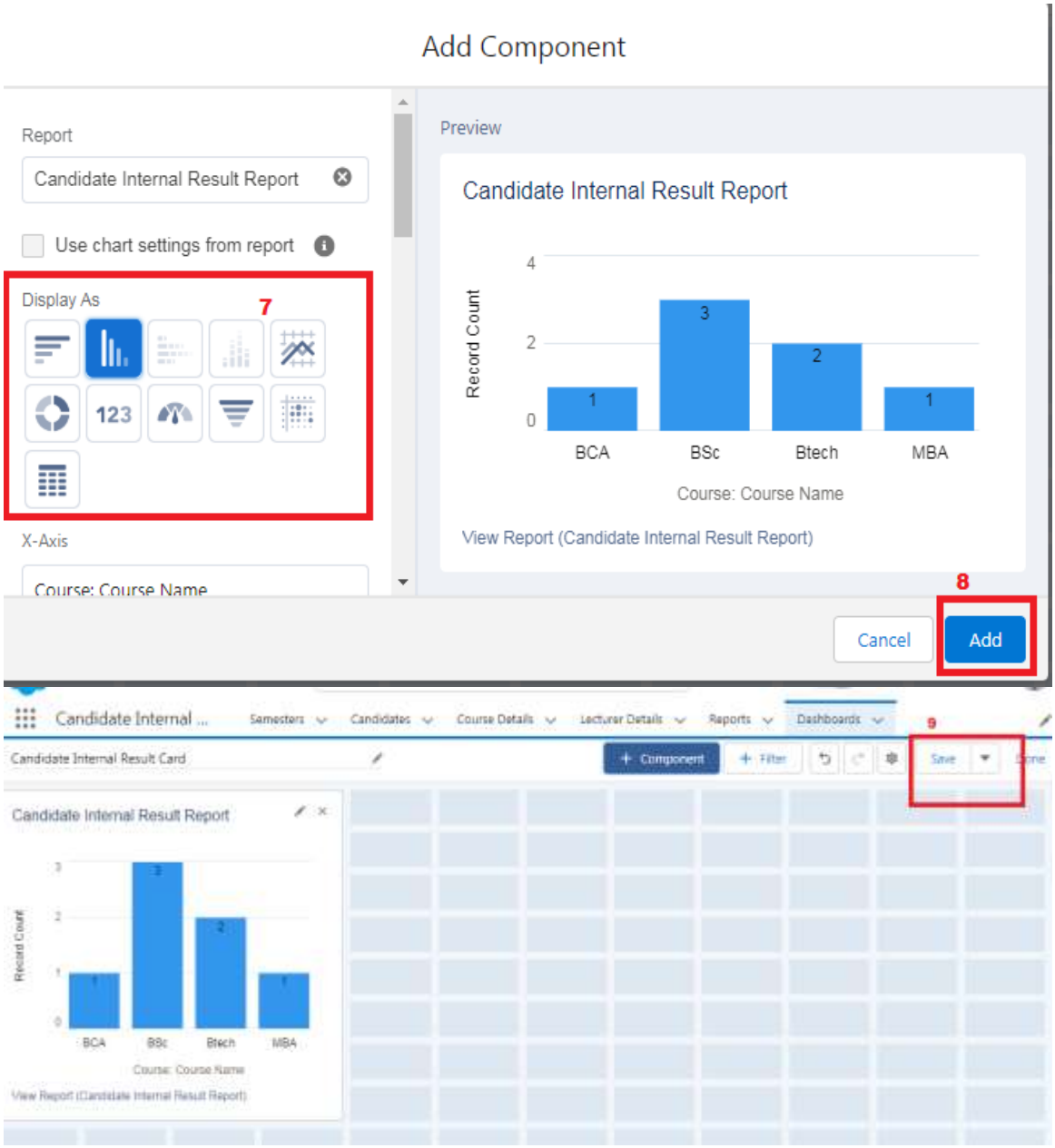
Public Reports
All Reports
Folders
Select Report
Search Reports and Folders...
Reports and Folders
Candidate Internal Result Report
[redacted] · 08-Apr-2023, 7:57 pm · Private Reports
6
job application with candidate name
Vanshiv Technologies · 08-Apr-2023, 7:08 pm · Private Reports
Propertys with Customer Name Report
Vanshiv Technologies · 08-Apr-2023, 12:58 pm · Private Reports



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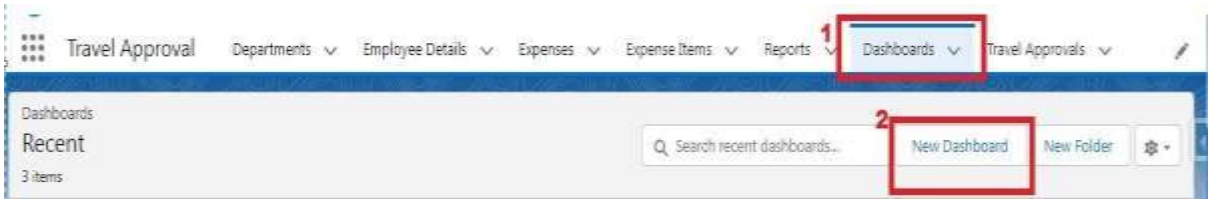

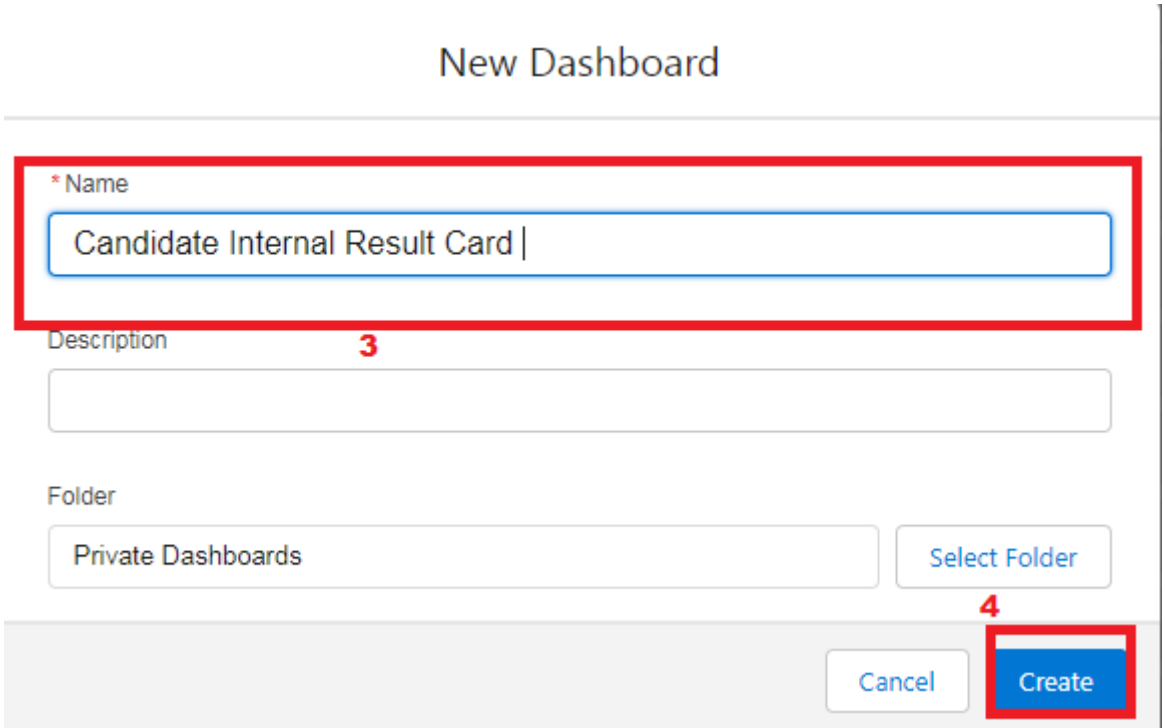
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Travel Approvals
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Filter
Save
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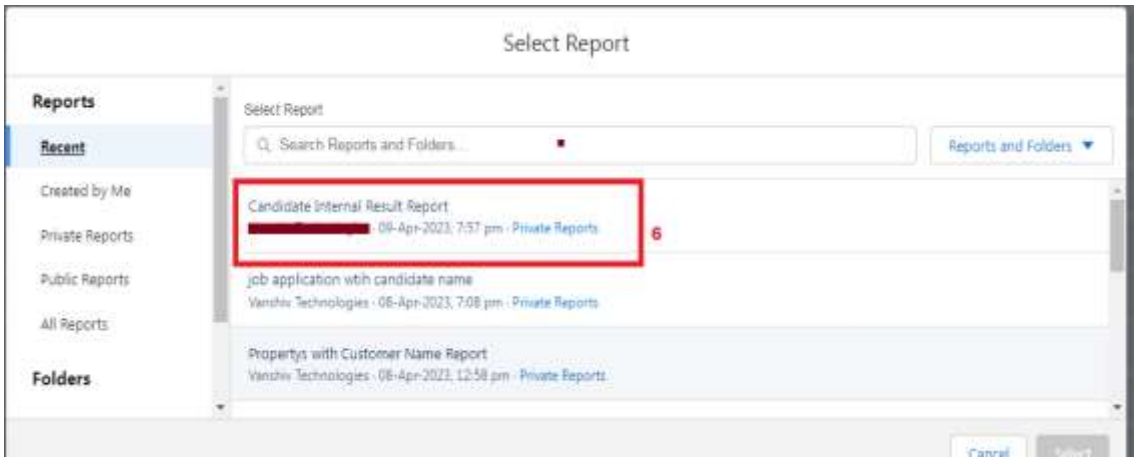
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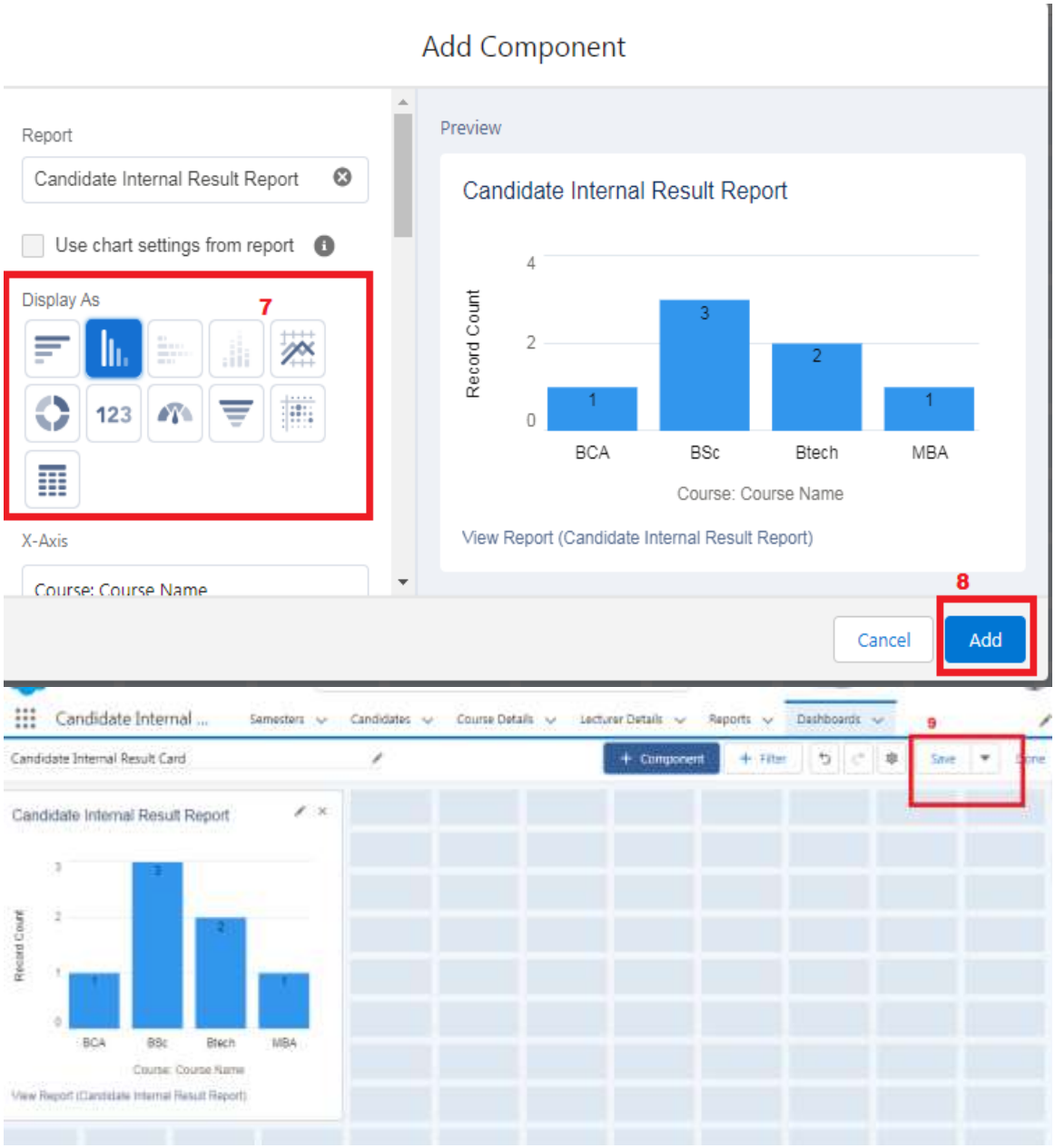
Add Component
Report
Candidate Internal Result Report
Use chart settings from report
Display As
7
123
X-Axis
Course: Course Name
Preview
Candidate Internal Result Report
Record Count
4
2
0
3
2
1
1
BCA
BSc
Btech
MBA
Course: Course Name
View Report (Candidate Internal Result Report)
8
Cancel
Add
Candidate Internal ...
Semesters
Candidates
Course Details
Lecturer Details
Reports
Dashboards
9
Candidate Internal Result Card
+ Component
+ Filter
Save
Done
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MBA
Course: Course Name
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