

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

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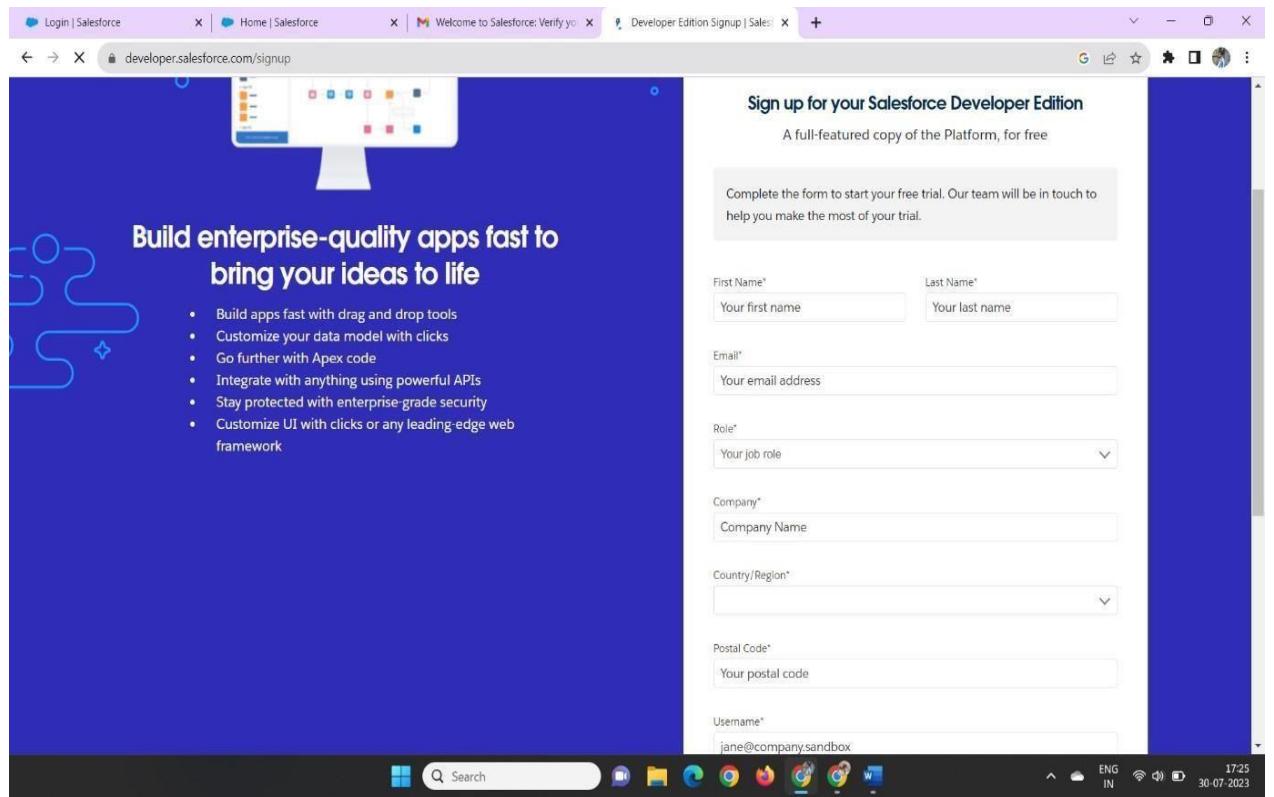
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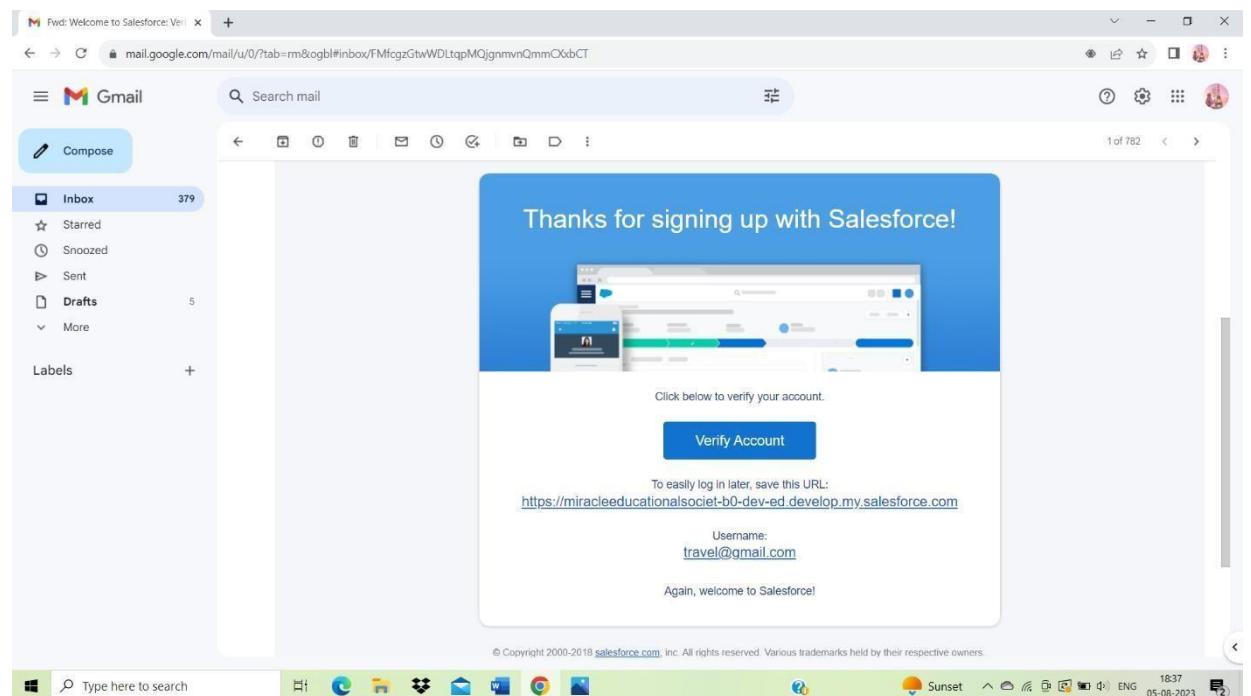
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Step 1:

Creating Developer Org by using Developer Edition Link



Step 2: Account Activation

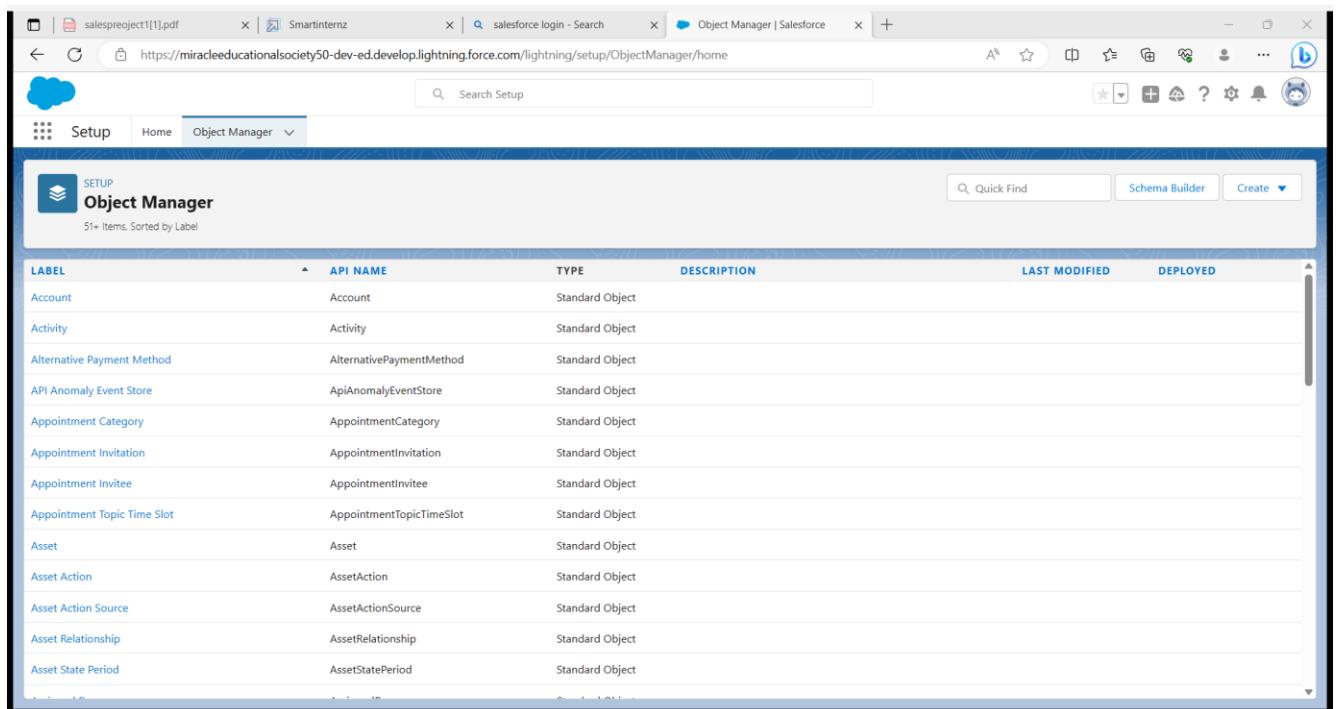


We can create password by clicking verify Account then we can directly login to salesforce Account

Step 3:

Creation Of Semester Object For Candidate Internal Result Card

We Can Create Developer Object in Object Manager by clicking on create - Custom Object and follow the steps in the guide



The screenshot shows the Salesforce Object Manager interface. The browser tabs at the top include "salesproject1[1].pdf", "Smartinternz", "salesforce login - Search", and "Object Manager | Salesforce". The main page header is "Object Manager" with a "SETUP" button. Below the header, there's a search bar labeled "Search Setup". The main content area displays a table of standard objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A search bar at the top right contains the text 'Search Setup'. The main area is titled 'New Custom Object' under 'Custom Object Definition Edit'. The 'Custom Object Information' section includes fields for 'Label' (set to 'Semester') and 'Plural Label' (set to 'Semesters'). A note indicates that the singular and plural labels are used in tabs, page layouts, and reports. Below this, the 'Object Name' field is set to 'Semester'. There is a 'Description' field which is currently empty. Under 'Context-Sensitive Help Setting', the option 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. At the bottom of the form, there is a section titled 'Enter Record Name Label and Format'.

In The Same Manner We have to Create Employee details ,
Expense,Expense items and Travel Approval Objects.

Step 4:

Creation Of Semester Tab For Candidate Internal Result Card

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.

Action	Label	Tab Style	Description
Edit Del	Candidates	Apple	
Edit Del	Course Details	Laptop	
Edit Del	Equipment Maintenance Items	Factory	
Edit Del	Internal results	Chip	
Edit Del	Lecturer Details	Bridge	
Edit Del	Semesters	Books	
Edit Del	Vehicles	Car	

Web Tabs

No Web Tabs have been defined

New Custom Object Tab

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object:

Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link:

Enter a short description.

Description:

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

Here We can create Tabs for our objects which we created earlier

Step 5:

Create The Candidate Internal Result Card App (Lightning App)

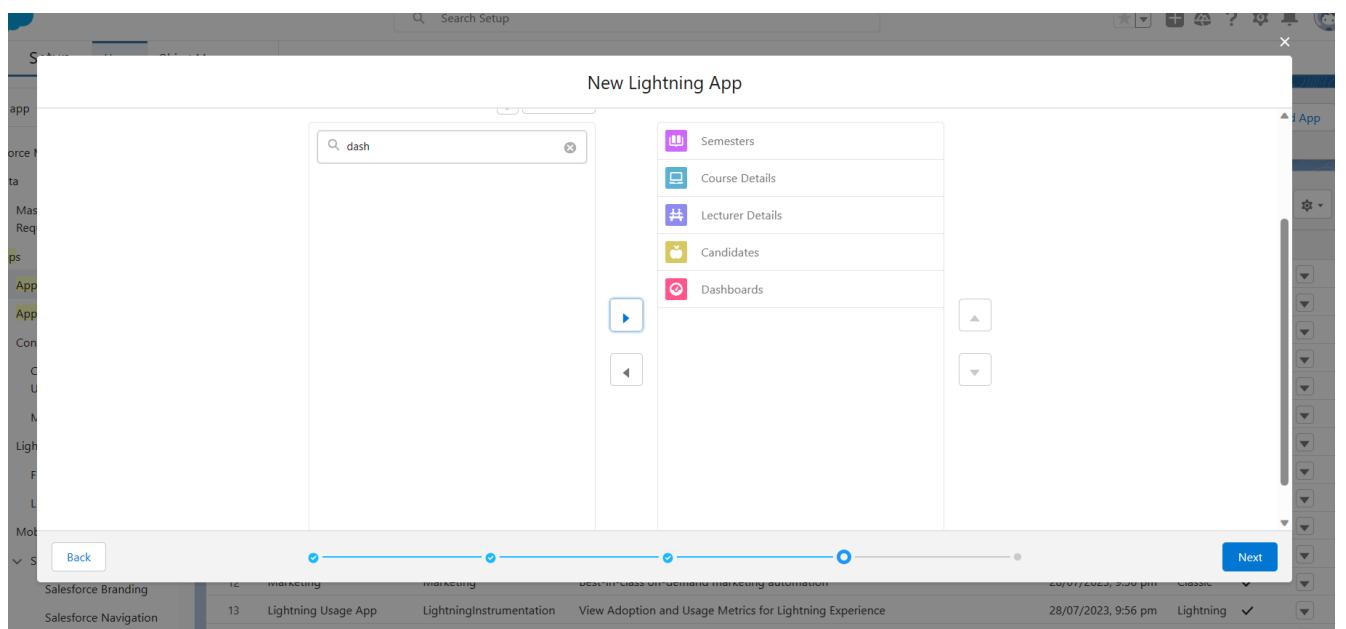
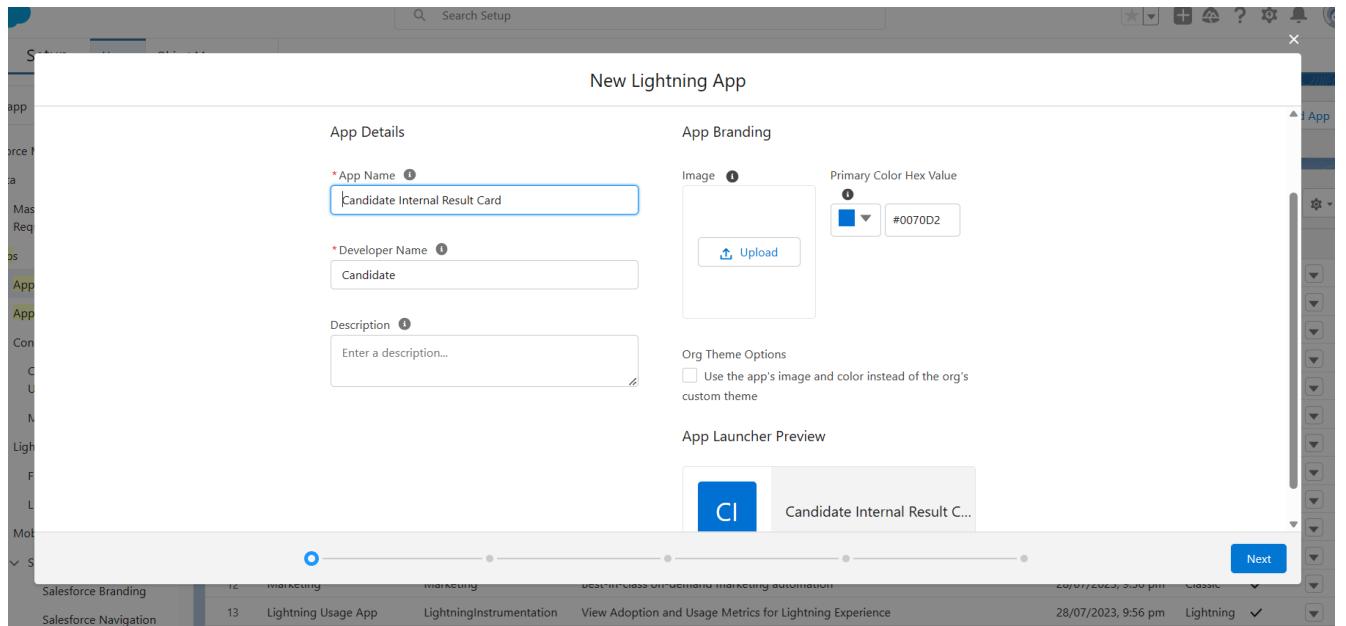
Now We Can Create a New Lightning App by Using App Manager

Click New Lighting app

App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visib...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps.	01/08/2023, 5:55 pm	Classic	✓
2 Analytics Studio	Insights	Discover and manage business solutions designed for your industry.	01/08/2023, 5:55 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	01/08/2023, 5:55 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Salesforce CRM Communities	01/08/2023, 5:57 pm	Lightning	✓
5 Community	Community	Salesforce CRM Content	01/08/2023, 5:55 pm	Classic	✓
6 Content	Content	Use Data Manager to view limits, monitor usage, and manage recipes.	01/08/2023, 5:55 pm	Lightning	✓
7 Data Manager	DataManager	Manage content and media for all of your sites.	01/08/2023, 5:55 pm	Lightning	✓
8 Digital Experiences	SalesforceCMS	View Adoption and Usage Metrics for Lightning Experience	01/08/2023, 5:55 pm	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	Best-in-class on-demand marketing automation	01/08/2023, 5:55 pm	Classic	✓
10 Marketing	Marketing	The fundamental Lightning Platform	01/08/2023, 5:55 pm	Classic	✓
11 Platform	Platform	Create and manage queues for your business.	01/08/2023, 5:55 pm	Lightning	✓
12 Queue Management	QueueManagement	Manage your sales process with accounts, leads, opportunities, and more.	01/08/2023, 5:55 pm	Classic	✓
13 Sales	Sales	Manage your sales force automation (SFA) solution	01/08/2023, 5:55 pm	Lightning	✓
14 Sales	LightningSales				

In those we Can Create a New lightning App

We have to give the app name as Candidate Internal Result Card
Leave the default items and click next until we find Available items



After moving the items to Selected items from Available Profile
Move the System Administrator into Selected Profiles and save

The screenshot shows a CRM interface with a top navigation bar featuring links like 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Dashboards', and 'Reports'. Below the navigation is a search bar and a toolbar with icons for star, plus, question mark, gear, and notifications. The main area is titled 'Candidate Internal ...' and displays a 'Recent' dashboard. A sidebar on the left lists categories: 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites). The central dashboard view shows a table with columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One item is listed: 'Candidate Internal Result Card' in the 'Private Dashboards' folder, created by 'Guna Ramarao' on '7/8/2023, 12:48 pm'.

Step 6:

Fields And Relationship

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

The screenshot shows the 'Object Manager' section of a CRM setup page. At the top, there's a 'Search Setup' bar and a 'Quick Find' bar. A sidebar on the right includes links for 'Setup', 'Service Setup', and 'Developer Console'. The main area is titled 'Object Manager' and shows a table of standard objects. The columns are: API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed include Account, Activity, AlternativePaymentMethod, ApiAnomalyEventStore, AppointmentCategory, AppointmentInvitation, AppointmentInvitee, AppointmentTopicTimeSlot, and Asset.

API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Activity	Standard Object			
AlternativePaymentMethod	Standard Object			
ApiAnomalyEventStore	Standard Object			
AppointmentCategory	Standard Object			
AppointmentInvitation	Standard Object			
AppointmentInvitee	Standard Object			
AppointmentTopicTimeSlot	Standard Object			
Asset	Standard Object			

Now take Data Type as a lookup click next.

Choose the related object as Semester and click next.

SETUP > OBJECT MANAGER Candidate

Candidate New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Semester Name

Field Name: Semester

Description:

Help Text:

Child Relationship Name: Candidates2

Required: Always require a value in this field in order to save a record
 Clear the value of this field. You can't choose this option if you make this field required.

What to do if the lookup record is deleted?
 Don't allow deletion of the lookup record that's part of a lookup relationship.
 Add this field to existing custom report types that contain this entity.

Step 3 of 6

Previous Next Cancel

Now enter Field Label as Semester Name Click next, Save and new.

In Those Manner We Can Create a Lecturer Details Field Data

SETUP Object Manager

1 Items. Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		06/08/2023	✓

In Lecturer Details object fields and Relationships click on new
 Select Datatype this field is of text type and click next
 Fill the field Label as Lecturer Role and length as 40
 Later we can click next, next & save

SETUP > OBJECT MANAGER
Lecturer Details

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

Field Type	Description
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Text Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	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.
URL	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

Click next and enter Field Label as Lecturer Role and Enter Length 40 and click next.

SETUP > OBJECT MANAGER
Lecturer Details

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous | Next | Cancel

Field Label	Lecturer Role
Length	40
Field Name	Lecturer_Role
Description	(empty)
Help Text	(empty)
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values <input checked="" type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive) <input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity

Click next , Save&new

Now we can Similarly create all lookup fields on their respective objects.

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

Click on object manager tab and select Course Details

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager. A search bar at the top right contains the text "course". Below the tabs, the title "Object Manager" is displayed with a subtitle "1 Items. Sorted by Label". A table lists the single item: "Course_Details" with API name "Course_Details__c", Type "Custom Object", Description "Custom Object", Last Modified "07/08/2023", and Deployed status.

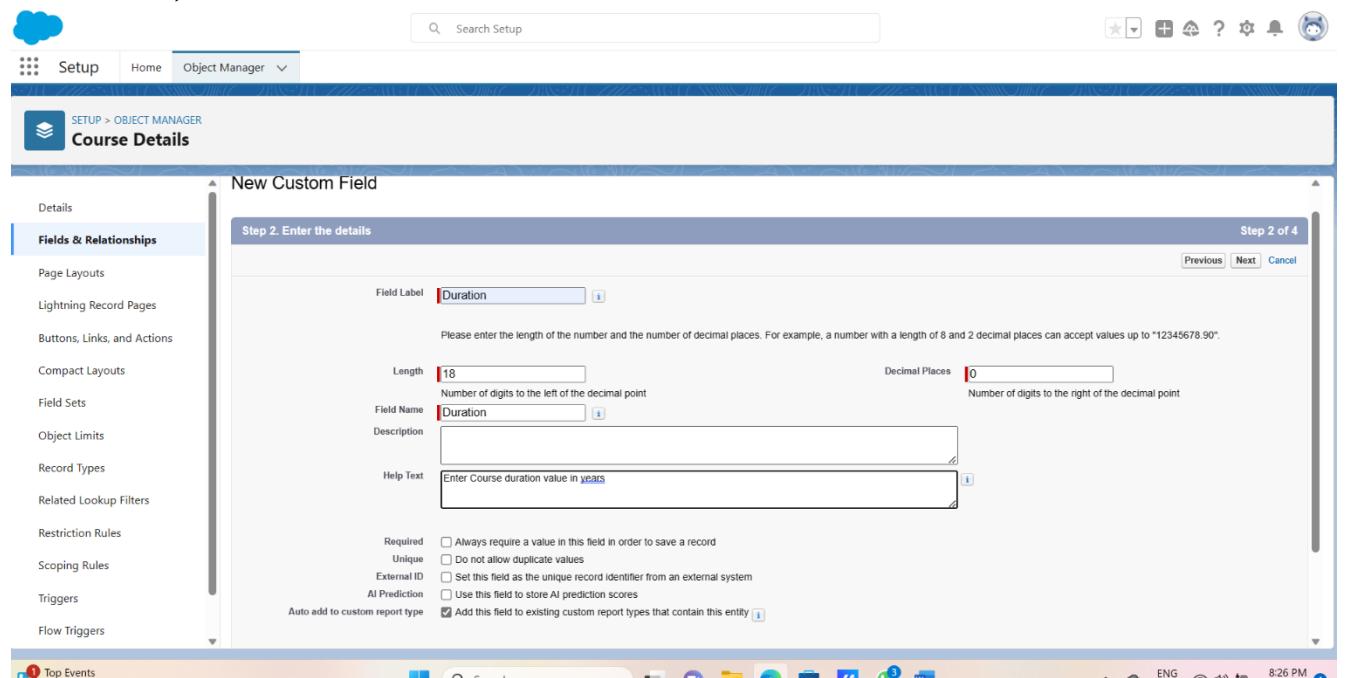
Now select Fields & Relationships
Click new tab and select field as a number and click next

The screenshot shows the "Fields & Relationships" section for the "Course Details" object. The left sidebar includes links for Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The main pane lists various field types with their descriptions:

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number** (selected)
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

Descriptions for each field type are provided, such as "Allows users to enter a date or pick a date from a popup calendar." and "Allows users to enter any number. Leading zeros are removed." At the bottom right of the main pane, there are "Next" and "Cancel" buttons.

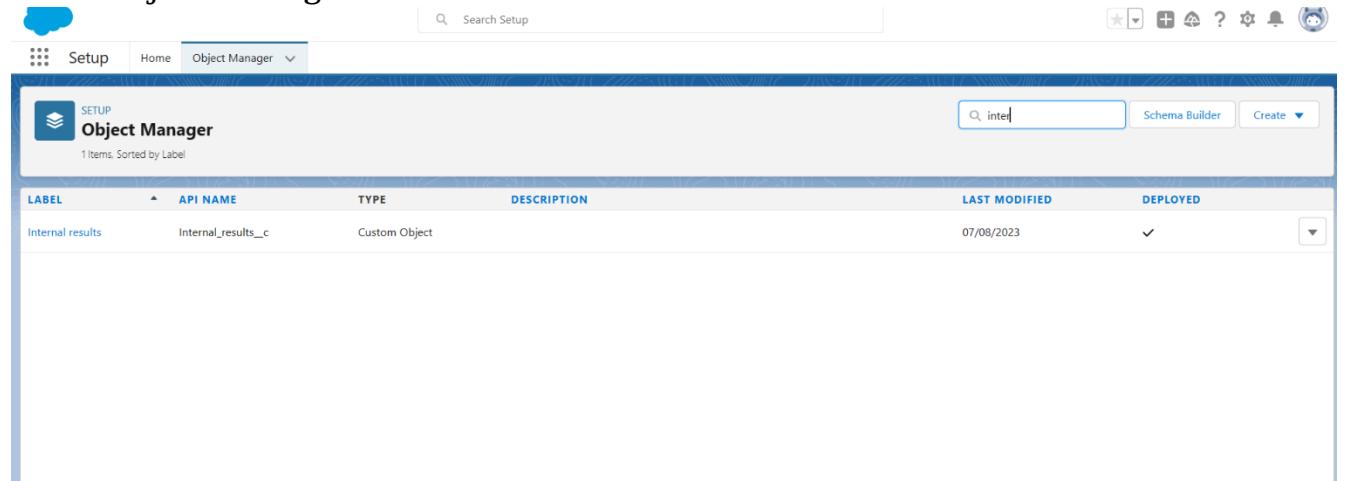
Enter Field label name as Duration and take help text as Enter Course duration value in years
 Click next, save & New



The screenshot shows the 'Course Details' object in the Object Manager. A new custom field is being created with the following details:

- Field Label:** Duration
- Length:** 18
- Decimal Places:** 0
- Field Name:** Duration
- Description:** (empty)
- Help Text:** Enter Course duration value in years
- Required:** Always require a value in this field in order to save a record
- Unique:** Do not allow duplicate values
- External ID:** Set this field as the unique record identifier from an external system
- AI Prediction:** Use this field to store AI prediction scores
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity

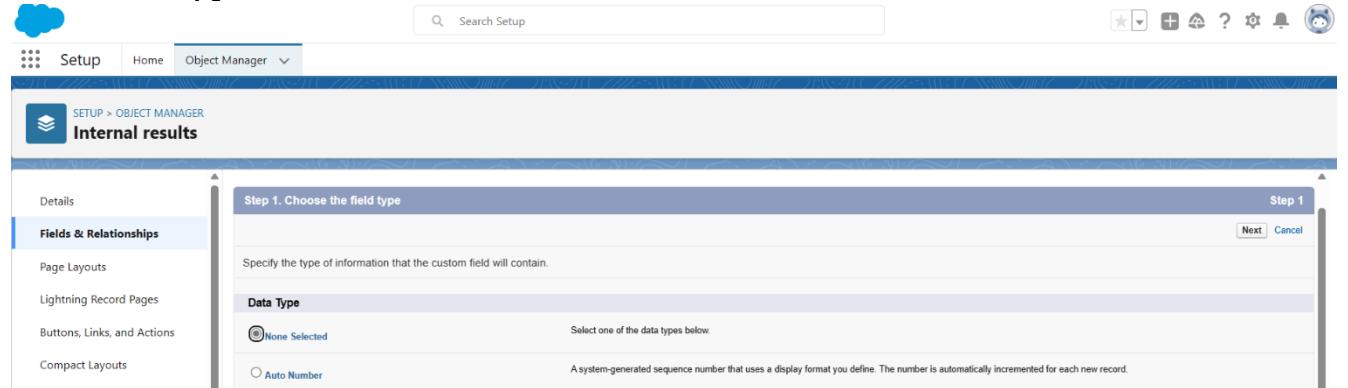
Click Object Manager tab and select Internal Results



The screenshot shows the 'Object Manager' tab selected. The 'Internal results' object is listed in the grid:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Internal results	Internal_results__c	Custom Object		07/08/2023	✓

Select Fields & Relationships and click new
 Take data type as a Formula and Click next



The screenshot shows the 'Internal results' object in the Object Manager. A new field is being created with the following details:

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Enter Field Label as Candidate Roll Number and select Formula return type as text and click next & save

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > Object Manager > Internal results**
- Step 2 of 5**: Choose output type
- Field Label:** Candidate Roll Number
- Field Name:** Candidate_Roll_Number
- Formula Return Type:** Text (selected)
- Options:**
 - None Selected
 - Checkbox
 - Currency
 - Date
 - Date/Time
 - Number
 - Percent
 - Text (selected)
 - Time
- Help Text:** Create a text string, for example, by concatenating other text fields.
- Example:** Full Name = LastName & " " & FirstName

Now click insert field and create
Insert candidate roll number
Then Click and save.

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > Object Manager > Internal results**
- Step 3 of 5**: Enter formula
- Formula:** Candidate results (Text)
- Simple Formula** tab selected
- Advanced Formula** subtab selected
- Functions:** A dropdown menu shows the following functions:
 - ABS
 - ACOS
 - ADDMONTHS
 - AND
 - ASCII
 - ASIN
- Quick Tips:**
 - Getting Started
 - Operators & Functions

Step 7:

Users

• Creating A User

Click on quick find search user
Select Users tab and Click new users

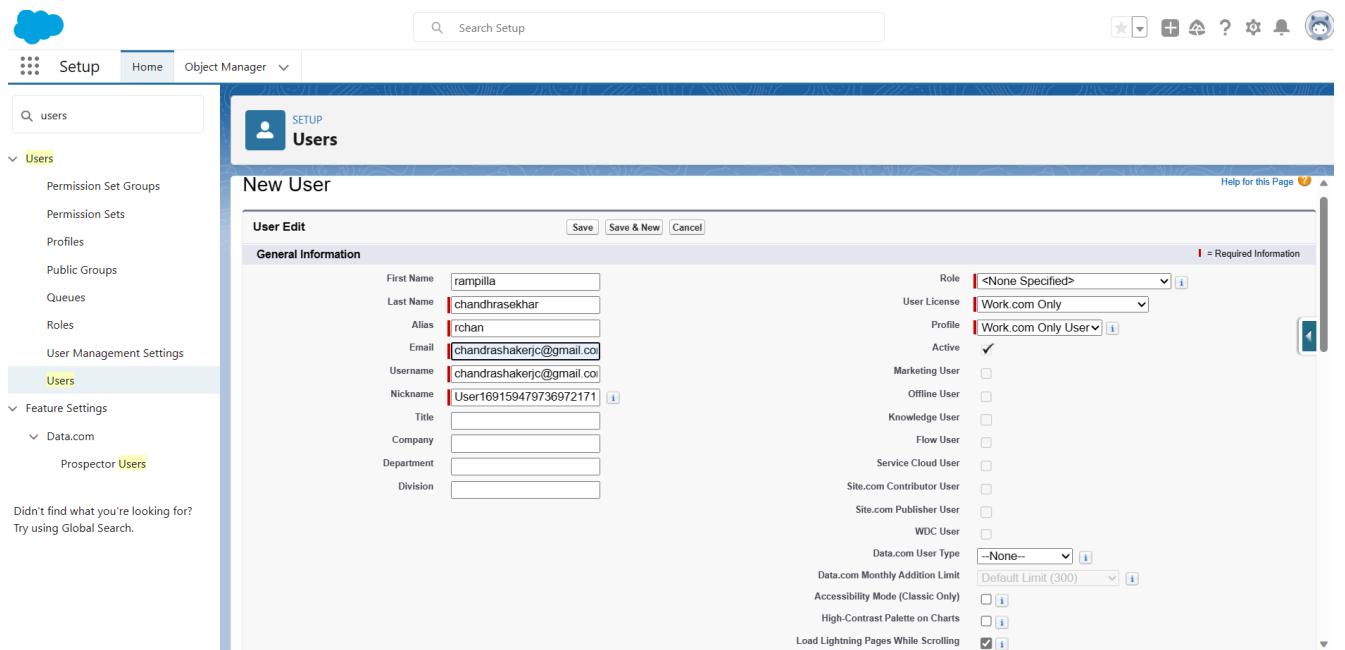
The screenshot shows the Salesforce Setup Home page. The left sidebar is titled 'Setup' and includes sections for 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' section is currently selected. Below the sidebar, there's a search bar with 'Q users' and a 'Create' button. The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. At the bottom, there's a 'Most Recently Used' section with a note for 10 items.

The screenshot shows the 'New User' creation page. The left sidebar is identical to the previous screenshot. The main area is titled 'User Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. A note at the top right says 'Help for this Page'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right of these fields are dropdown menus for 'Role' (set to '<None Specified>'), 'User License' (set to 'Work.com Only'), 'Profile' (set to 'Work.com Only User'), and 'Active' (checkbox checked). There are also checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. At the bottom, there are dropdowns for 'Data.com User Type' (set to 'None') and 'Data.com Monthly Addition Limit' (set to 'Default Limit (300)'). A link 'Hindi Contrast Palette on Charts' is also present.

Enter first name as Class, last name as teacher ,email and unique user name

Click on the user licence as salesforce and profile as standard user

Click save.



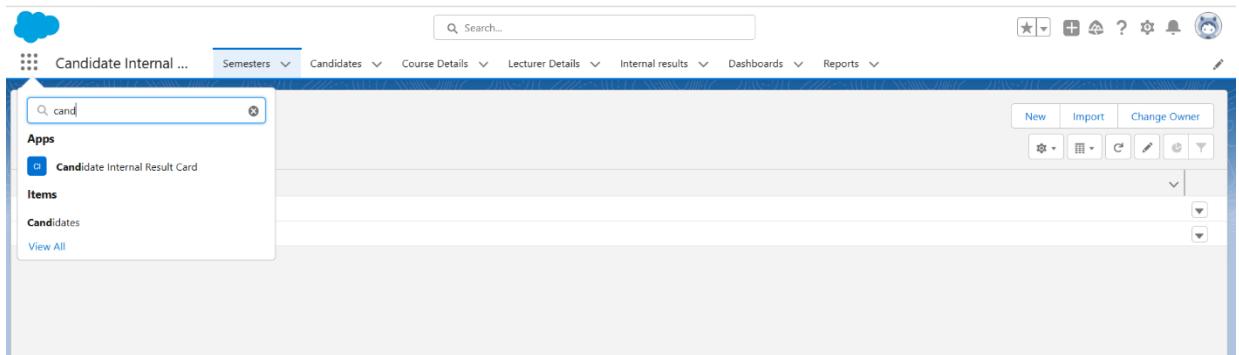
And click on the generate new password for login users of the data

Step 8:

User Adoption

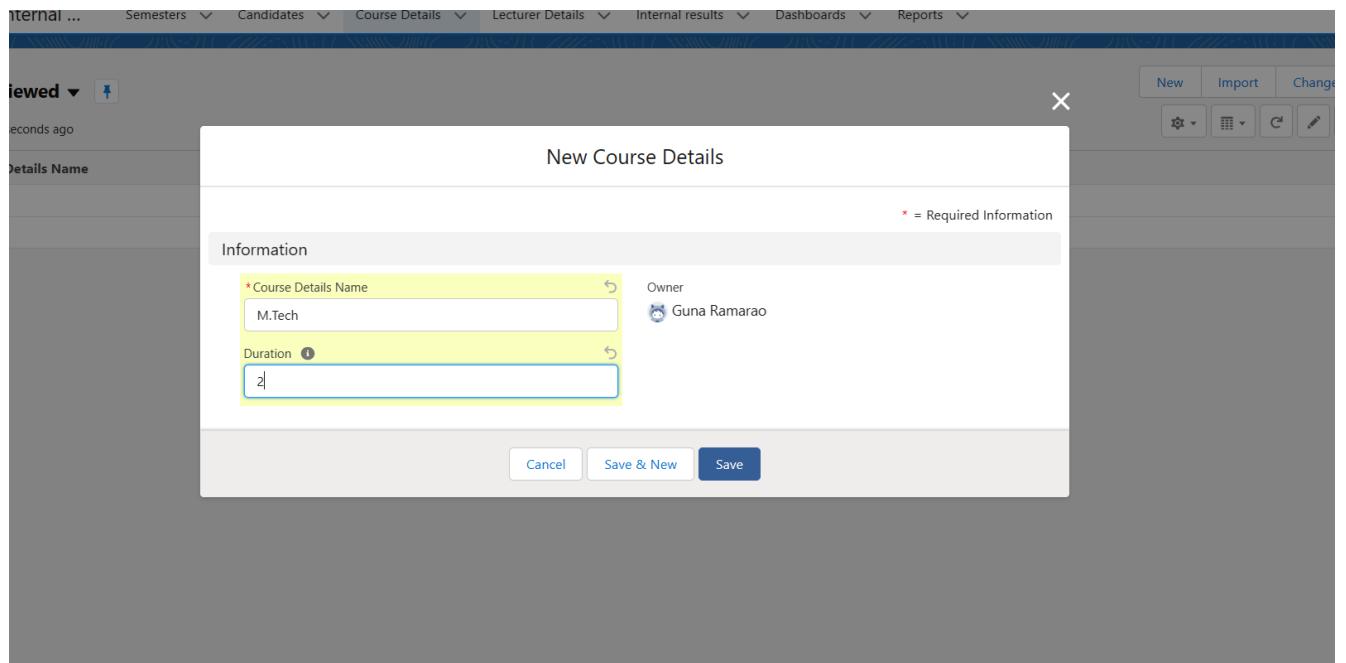
- **Create Record (Course Details)**

Click on App Launcher and search Candidate internal result card app and click it.



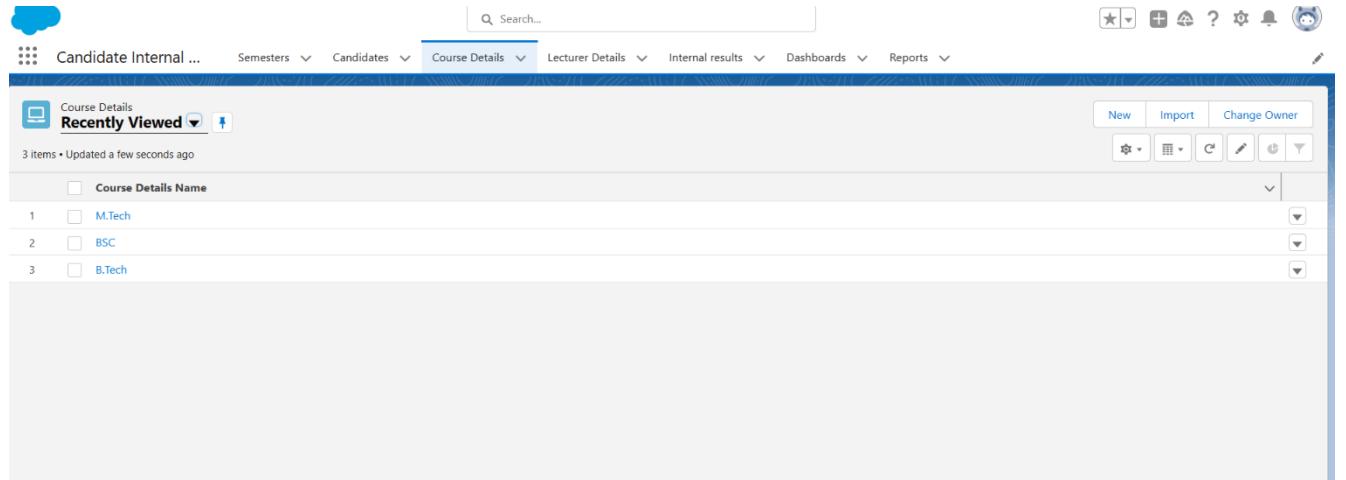
Click course details tab and click new course details and enter new course details record.

Click on save button



• View Record (Course Details)

Click app launcher and select candidate internal result card and click Course Details tab you can see the details of the Driver.



• Delete Record (Course Details)

Similarly click app launcher and select Candidate Internal Result card and click Course Details tab and click right corner arrow and delete the course

Step 9: 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:

- 1.Tabular Reports
- 2.Summary Reports
- 3.Matrix Reports and
- 4.Joined Reports.

• Create Report

Click on app manager tab and select candidate internal result card
And click on reports tab and click new report

Report Name	Description	Folder	Created By	Created On	Subscribed
Candidate Internal Result Report		Private Reports	Guna Ramarao	7/8/2023, 12:42 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	28/7/2023, 9:56 pm	

Click on new report tab and click return type as semester with course

Create Report

Category

Recently Used

All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets
Administrative Reports

Select a Report Type

Search Report Types...

Recently Used Report Types

Report Type Name	Category
Semesters	Standard

Give the report name as Candidate Internal Result Report

And click save

In this report you can see your all record of the object you selected for reporting

REPORT ▾

New Semesters Report Semesters

Fields >

Outline Filters 1

Groups GROUP ROWS Add group...

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

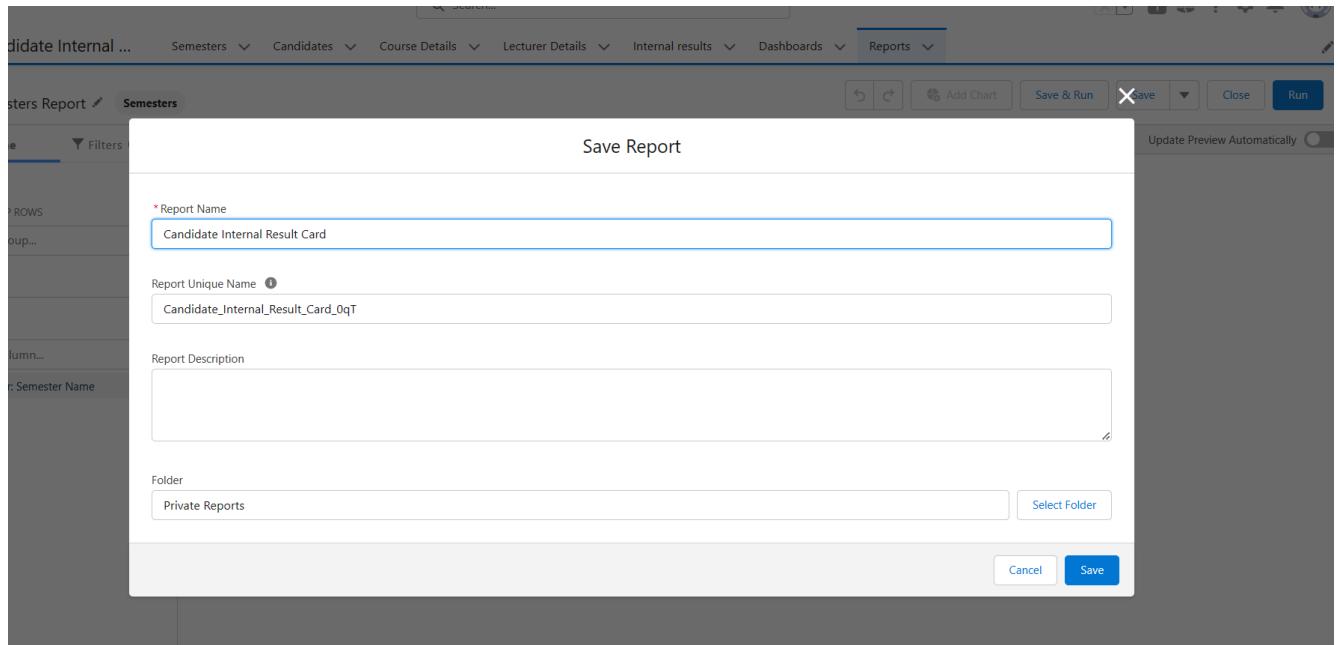
	Semester: Semester Name
1	7th semester
2	2nd semester

Update Preview Automatically

Columns Add column... Semester: Semester Name

Add Chart Save & Run Save Close Run

Give the report name as Candidate Internal Result Card
And click save



• View Report

click on the app launcher and search as Travel Approval App on the reports tab

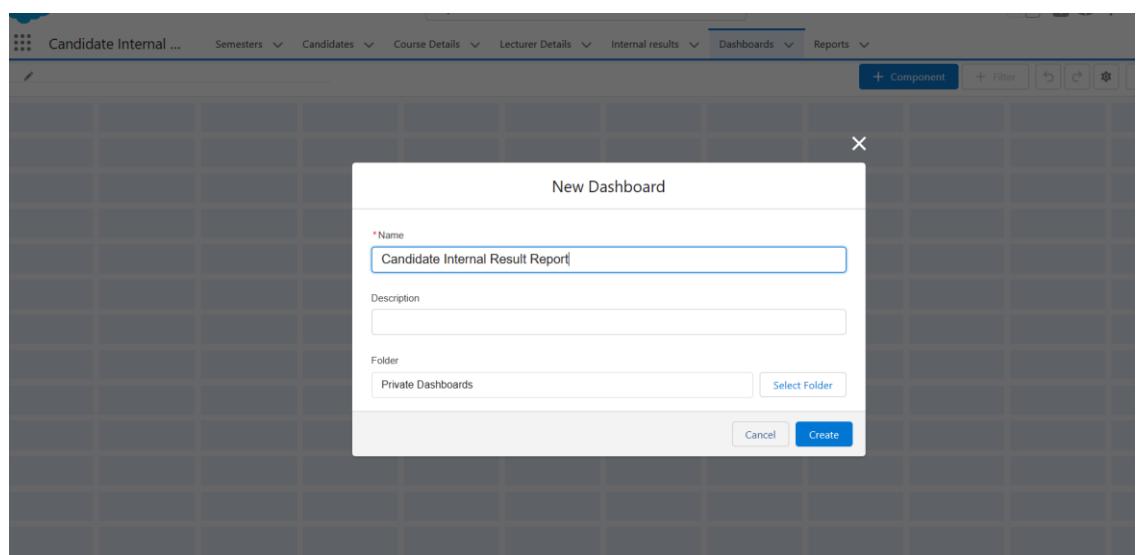
Report Name	Description	Folder	Created By	Created On	Subscribed
Candidate Internal Result Report	Private Reports	Guna Ramarao	7/8/2023, 12:42 pm		
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	28/7/2023, 9:56 pm	

we can check the reports tab

Step 10 :

• Create Dashboard

click on the app launcher and search as Candidate Internal Result Card we click on the dashboard and create a new dashboard with the name of Candidate Internal Result Report.



Then we can click on the + component and create a dashboard data

The screenshot shows a software application window titled "Candidate Internal ...". The top navigation bar includes links for "Semesters", "Candidates", "Course Details", "Lecturer Details", "Internal results", "Dashboards", and "Reports". Below the navigation is a search bar and a toolbar with various icons. The main content area is a large, empty grid table with many columns and rows, representing a report structure.

Select Candidate Internal Result Report that you created

The screenshot shows a "Select Report" dialog box. On the left, there is a sidebar with sections for "Reports" (Recent, Created by Me, Private Reports, Public Reports, All Reports) and "Folders" (Created by Me, Shared with Me, All Folders). The main area has a search bar with the text "ca" and a result list. One result is highlighted: "Candidate Internal Result Report" (Guna Ramarao - 07-Aug-2023, 12:50 pm - Private Reports). At the bottom right of the dialog are "Cancel" and "Select" buttons. The background shows the same software interface as the first screenshot.

Later we click on the report we select the data on the field

The screenshot shows a Microsoft Dynamics 365 application interface. At the top, there's a navigation bar with links for Semesters, Candidates, Course Details, Lecturer Details, Internal results, Dashboards, and Reports. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled "Candidate Internal Result Report". On the left, there's a sidebar with a title "Candidate Internal Result Report" and a dropdown menu for "Semester: Semester Name" with options "2nd semester" and "7th semester". Below this is a button labeled "View Report (Candidate Internal Result Report)". The main grid area is a large, empty table with many columns and rows.

Then click on the finish it will be created

• View Dashboards

click on the app launcher and search as Candidate Internal Result Report click on the dashboard tab and we can check the dashboards click on Candidate Internal Result Report and See graph view of records

The screenshot shows a Microsoft Dynamics 365 application interface, similar to the one above. At the top, there's a navigation bar with links for Semesters, Candidates, Course Details, Lecturer Details, Internal results, Dashboards, and Reports. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled "Candidate Internal Result Report". On the left, there's a sidebar with a title "Candidate Internal Result Report" and a dropdown menu for "Semester: Semester Name" with options "2nd semester" and "7th semester". Below this is a button labeled "View Report (Candidate Internal Result Report)". The main grid area is a large, empty table with many columns and rows.