

# Project Report

## 1. INTRODUCTION

### Project overview

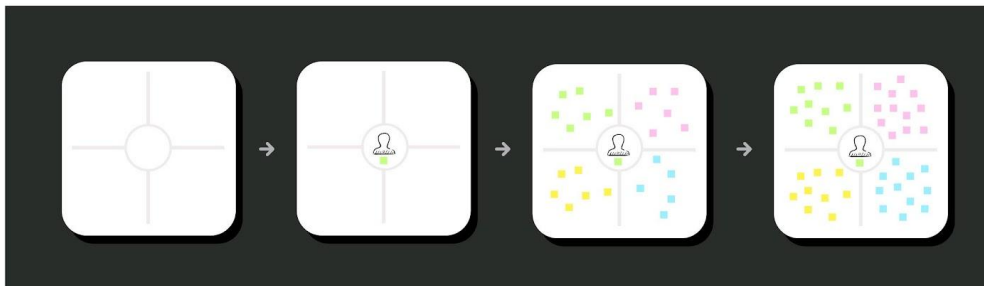
Implementing CRM for Result tracking of a candidate with internal marks.

Empathy map:



## Build empathy

The information you add here should be representative of the observations and research you've done about your users.



Brainstorming:

## **Milestone 1:Creation Salesforce Org:**

Activity 1:

Creating Developer Account

Creating a developer org in salesforce.

Go to [developers.salesforce.com/](https://developers.salesforce.com/)

Click on sign up.

On the sign up form, enter the following details :

1.First name & Last name

2.Email

3.Role : Developer

4.Company : College Name

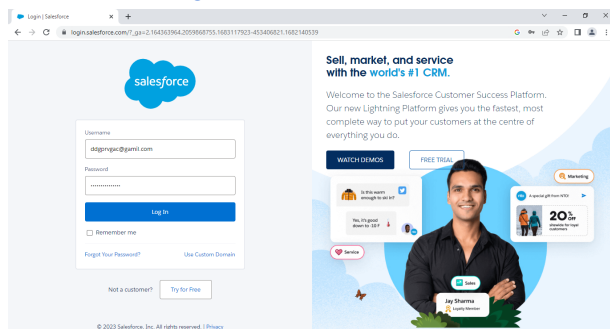
5.County : India

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](mailto:username@organization.com)

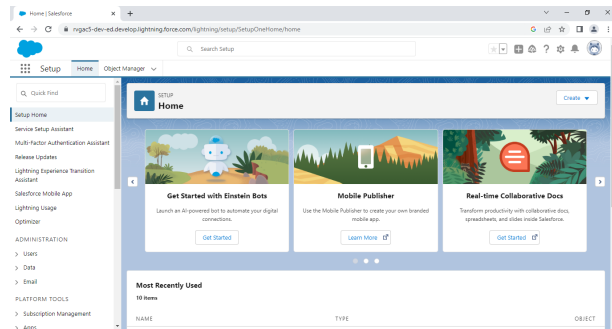


Login To Your Salesforce Account

1.Go to [salesforce.com](https://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-2:Object

Custom objects:

1.Semester 2.Candidate 3.Course Details 4.Lecturer Details 5.Internal results

### Activity-1:

To Create an object:

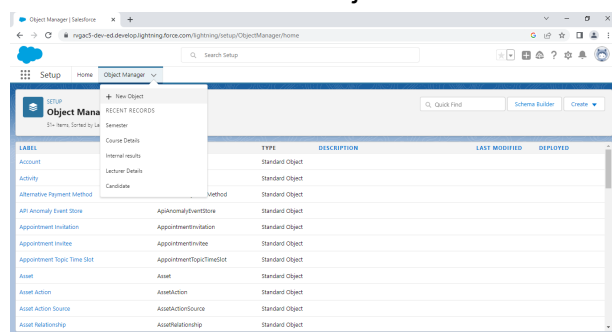
Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e Semester,Candidate,Course Details,Lecturer Details,Internal Results.

The below steps will assist you in creating those objects.

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:

1.Label: Semester

2.Plural Label: Semesters

3.Record Name: Semester Name

4.Check the Allow Reports checkbox

5.Check the Allow Search checkbox

6.Click Save.

7.Now create a custom tab. Click the Home tab, 8.enter Tabs in Quick Find and select Tabs.

9.Under Custom Object Tabs, click New.

10. For Object, select Semester.  
 For Tab Style, select any icon.  
 Leave all defaults as is. Click Next, Next, and Save.

## **Milestone -2:Fields and Relationship**

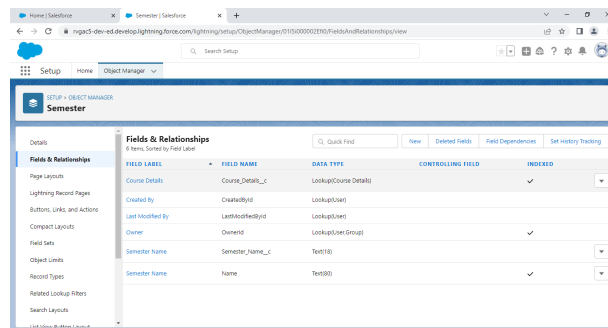
### Activity-1:

Creation of fields:

Click the gear icon and select Setup. This launches Setup in a new tab.

1. Click the Object Manager tab next to Home.
2. Select Semester.
3. Select Fields & Relationships from the left navigation, and click New Now ready to make a custom field. Let's do this!
4. Select the Text as the Data Type, then click Next.
5. For Field Label, Enter Semester Name.

Click Next, Next, then Save



Activity-2: Similarly Create Following Fields according to the objects.

Semester:	Candidate:	Course Details:	Lecturer Details:	Internal results
Semester Name	Candidate Name	Course Name	Lecturer Role	Candidate ID
Course(lookup)	Candidate Id	Course ID	Lecturer Name	Course ID
	Semester Name		Course ID	Marks
	Internal results(lookup )		Course(lookup)	

## **Milestone-3:Lightning App**

### Activity-1:

Create the Candidate Internal Result Card app:

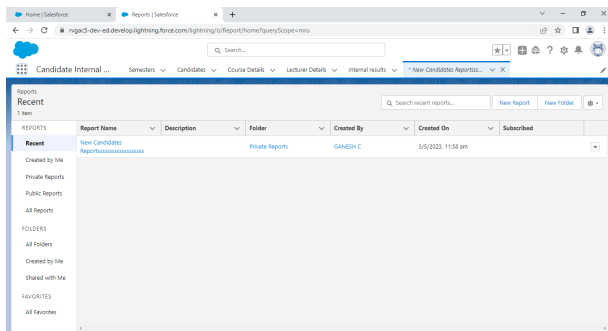
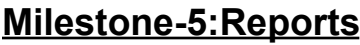
- 1.From Setup, enter App Manager in the Quick Find and select App Manager.
- 2.Click New Lightning App. Enter Candidate Internal Result Card as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- 3.Under Utility Items, leave as is and click Next.
- 4.From Available Items, select Semester,Candidate,Course Details,LecturerDetails,InternalResults and move them to Selected Items. Click Next.
- 5.From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- 6.To verify your changes, click the App Launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.

## **Milestone-4: Users**

### Activity 1:

Creating a Users:

- 1.From Setup, in the Quick Find box, enter Users, and then select Users.
- 2.Click New User.
- 3.Enter the user's name John Martin and (Your) email address and a unique username in the form of an email address.
- 4.By default, the username is the same as the email address.
- 5.Select a Role(none)
- 6.Select a User Licence As salesforce.
- 7.Select a profile as Salesforce User.
- 8.Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



### **Milestone-6: Dashboards:**

- 1.Create a Dashboard:
- 2.Click the Dashboards tab.
- 3.Click New Dashboard.
- 4.Name your dashboard Candidate Board . Leave all other fields as is and click Create.
- 5.Click + Component.
- 6.For Report, select Candidate Marksby Stage. Click Select. ...
- 7.For Display As, select Vertical Bar Chart and click Add.
- 8.Click Save.
- 9.Click Done

[illegible]