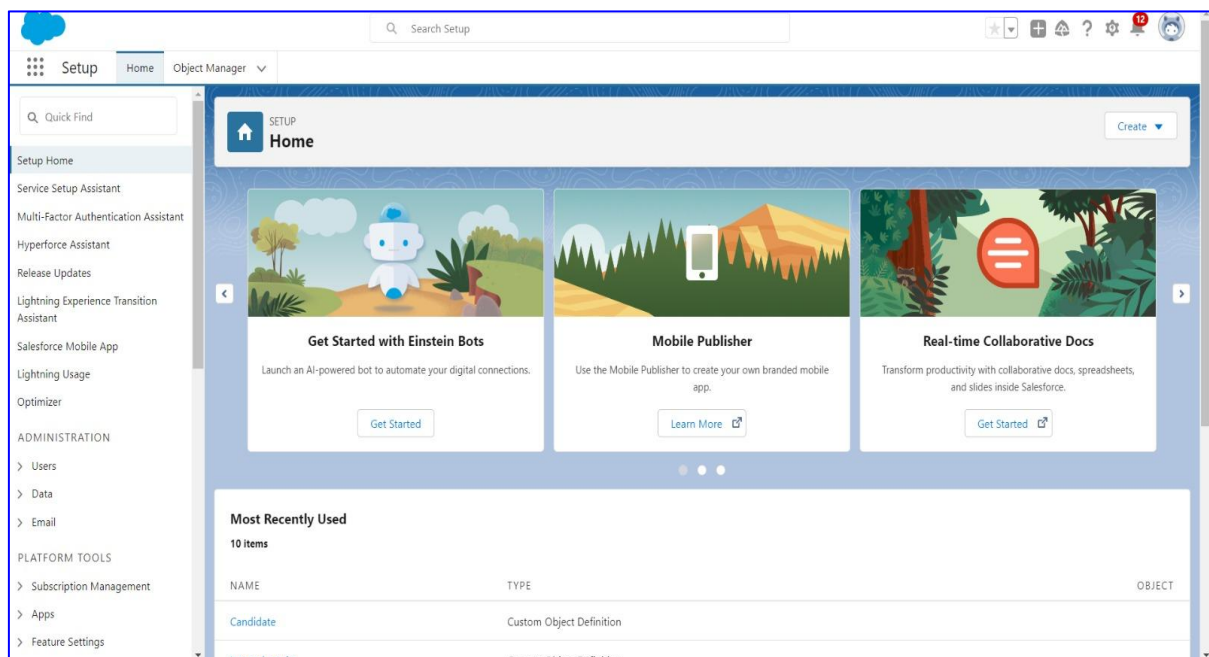


Implementing CRM For Result Tracking Of A Candidate With Internal Marks - (ADMIN)

Project Report

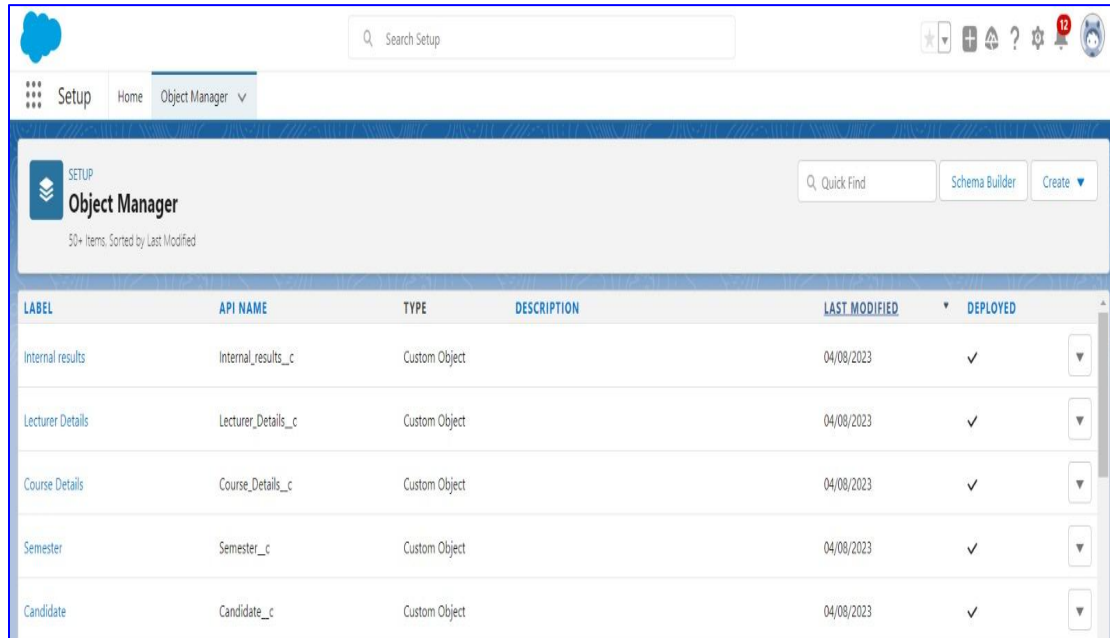
Creating a developer org in salesforce:

- ◆ Go to developers.salesforce.com/signup
- ◆ Click on sign up.
- ◆ On the sign-up form, enter the following details:
- ◆ First name & Last name – Aruna Magani
- ◆ Email – arunamagani25@gmail.com
- ◆ Role: Developer
- ◆ Company: College Name – GAYATRI DEGREE COLLEGE – TIRUPATI
- ◆ County: India
- ◆ Postal Code: pin code – 517501
- ◆ Username: arunamagani25@gdctirupati.com



Create an Object:

I am creating 5 Objects – Semester, Candidate, Course Details, Lecturer details and Internal results

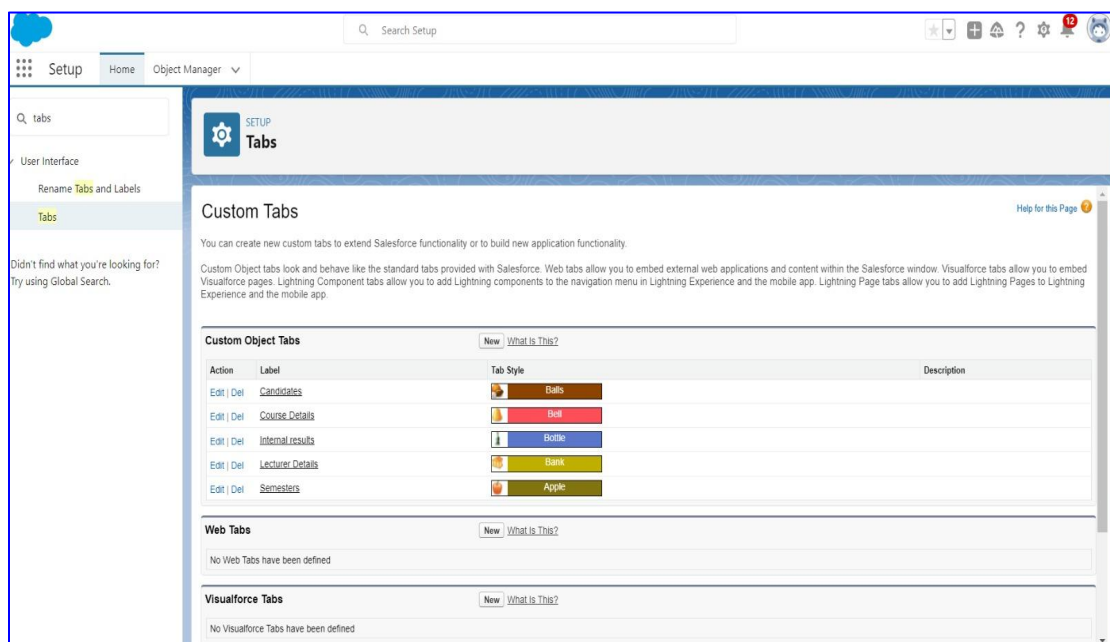


The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. Below the navigation, the Object Manager header includes a 'Quick Find' search bar, 'Schema Builder' button, and a 'Create' dropdown. The main content area displays a table of custom objects.

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|------------------|---------------------|---------------|-------------|---------------|----------|
| Internal results | Internal_results__c | Custom Object | | 04/08/2023 | ✓ |
| Lecturer Details | Lecturer_Details__c | Custom Object | | 04/08/2023 | ✓ |
| Course Details | Course_Details__c | Custom Object | | 04/08/2023 | ✓ |
| Semester | Semester__c | Custom Object | | 04/08/2023 | ✓ |
| Candidate | Candidate__c | Custom Object | | 04/08/2023 | ✓ |

Creating the Following Tabs :

I am Creating 5 Tabs Semester, Candidate, Course Details, Lecturer Details and Internal results..

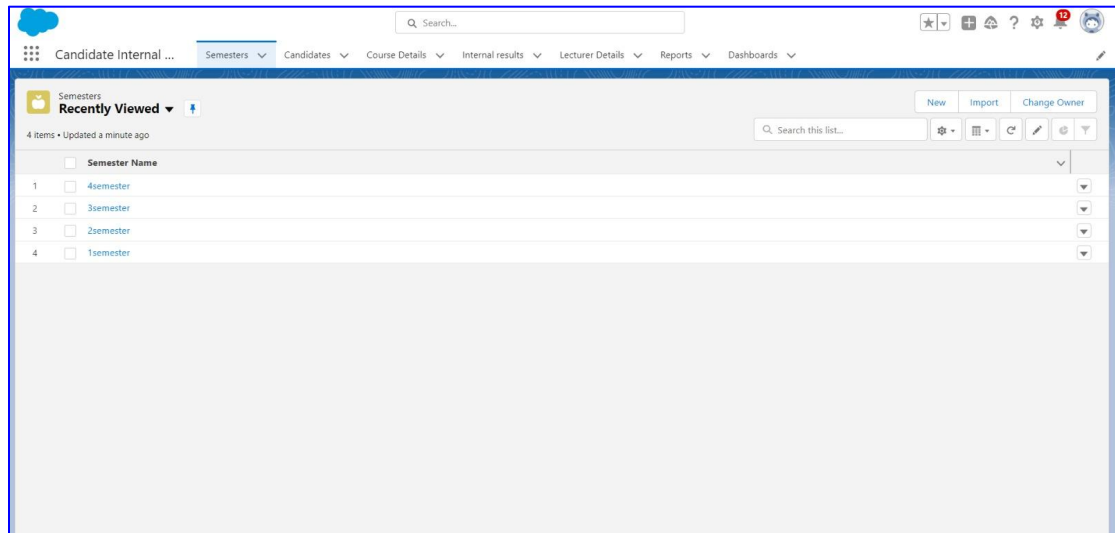


The screenshot shows the Salesforce Custom Tabs configuration page. The left sidebar has a search bar and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there's a description of custom tabs and a table of custom object tabs.

| Action | Label | Tab Style | Description |
|------------|------------------|-----------|-------------|
| Edit Del | Candidates | Balls | |
| Edit Del | Course Details | Ball | |
| Edit Del | Internal results | Bottom | |
| Edit Del | Lecturer Details | Blank | |
| Edit Del | Semesters | Apple | |

Create The Candidate Internal Result Card App:

Creating Candidate Internal Result app in App Manager.



Creating Fields in Object:

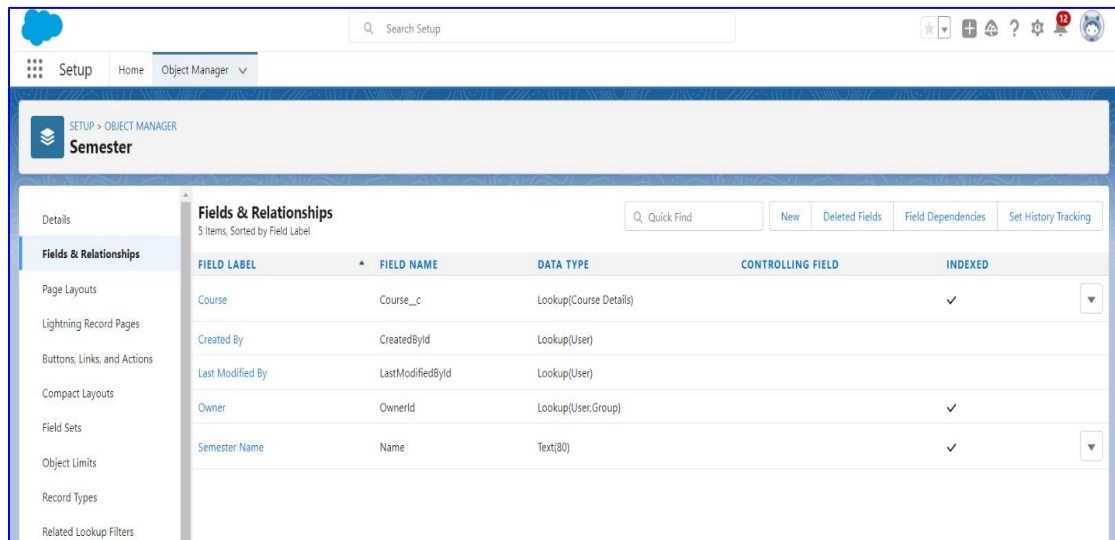
Fields - Fields store data values that are required for a particular object in a record.

I am Creating Fields in 5 Objects - Semester, Candidate, Course Details, Lecturer Details and Internal results.

- ◆ Click the gear icon and select Setup. This launches Setup in a new tab.
- ◆ Click the Object Manager tab next to Home.
- ◆ Select Lecturer Details
- ◆ Select Fields & Relationships from the left navigation
- ◆ Click New
- ◆ Select the Text as the Data Type, click next.
- ◆ For Field Label, enter Lecturer Role
- ◆ Enter Length 40
- ◆ Click Next, Next, then Save & New.

- ◆ Like this Steps we Created Some Fields in Object Manager.

| | | |
|----------|---------------|------------------------|
| Semester | Semester Name | Text(Standard field) |
| | Course | Lookup(Course Details) |



SETUP > OBJECT MANAGER
Semester

Fields & Relationships
5 Items, Sorted by Field Label

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|------------------------|-------------------|---------|
| Course | Course__c | Lookup(Course Details) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Semester Name | Name | Text(80) | | ✓ |

| | | |
|-----------|-----------------------|----------------------|
| Candidate | Candidate Name | Text(Standard field) |
| | Candidate Roll Number | Auto Number |
| | Semester Name | Look up (Semester) |

| <div> <div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div> <div>Search Setup</div> </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--------------------------|--------------------|-------------------|---------|-------------|------------|-----------|-------------------|---------|----------------|------|----------|--|---|-----------------------|--------------------------|-------------|--|--|------------|-------------|--------------|--|--|------------------|------------------|--------------|--|--|-------|---------|--------------------|--|---|---------------|------------------|------------------|--|---|
| <div> <div> <div> <div>SETUP > OBJECT MANAGER</div> <div>Candidate</div> </div> </div> <div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> </div> </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div> <div>Fields & Relationships</div> <div>6 Items, Sorted by Field Label</div> <div> <div>Q Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> <table> <tr> <th>FIELD LABEL</th><th>FIELD NAME</th><th>DATA TYPE</th><th>CONTROLLING FIELD</th><th>INDEXED</th></tr> <tr> <td>Candidate Name</td><td>Name</td><td>Text(80)</td><td></td><td>✓</td></tr> <tr> <td>Candidate Roll Number</td><td>Candidate_Roll_Number__c</td><td>Auto Number</td><td></td><td></td></tr> <tr> <td>Created By</td><td>CreatedById</td><td>Lookup(User)</td><td></td><td></td></tr> <tr> <td>Last Modified By</td><td>LastModifiedById</td><td>Lookup(User)</td><td></td><td></td></tr> <tr> <td>Owner</td><td>OwnerId</td><td>Lookup(User,Group)</td><td></td><td>✓</td></tr> <tr> <td>Semester Name</td><td>Semester_Name__c</td><td>Lookup(Semester)</td><td></td><td>✓</td></tr> </table> </div> | | | | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED | Candidate Name | Name | Text(80) | | ✓ | Candidate Roll Number | Candidate_Roll_Number__c | Auto Number | | | Created By | CreatedById | Lookup(User) | | | Last Modified By | LastModifiedById | Lookup(User) | | | Owner | OwnerId | Lookup(User,Group) | | ✓ | Semester Name | Semester_Name__c | Lookup(Semester) | | ✓ |
| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Candidate Name | Name | Text(80) | | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Candidate Roll Number | Candidate_Roll_Number__c | Auto Number | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Created By | CreatedById | Lookup(User) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Last Modified By | LastModifiedById | Lookup(User) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Semester Name | Semester_Name__c | Lookup(Semester) | | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | | |
|------------------|-----------------------|-------------------|
| Internal results | Candidate | Lookup(Candidate) |
| | Candidate Roll Number | Formula |
| | Course | Lookup(Course) |
| | Marks | Number |

| <div> <div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div> <div>Search Setup</div> </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--------------------------|------------------------|-------------------|---------|-------------|------------|-----------|-------------------|---------|-----------|--------------|-------------------|--|---|-----------------------|--------------------------|----------------|--|--|--------|-----------|------------------------|--|---|------------|-------------|--------------|--|--|-----------------------|------|----------|--|---|------------------|------------------|--------------|--|--|-------|----------|---------------|--|--|-------|---------|--------------------|--|---|
| <div> <div> <div> <div>SETUP > OBJECT MANAGER</div> <div>Internal results</div> </div> </div> <div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> </div> </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Candidate | Candidate__c | Lookup(Candidate) | | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Candidate Roll Number | Candidate_Roll_Number__c | Formula (Text) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Course | Course__c | Lookup(Course Details) | | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Created By | CreatedById | Lookup(User) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Internal results Name | Name | Text(80) | | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Last Modified By | LastModifiedById | Lookup(User) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Marks | Marks__c | Number(18, 0) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | | |
|------------------|---------------|----------------------|
| Lecturer Details | Lecturer Name | Text(Standard field) |
| | Lecturer Role | Text |
| | Course | Lookup(Course) |

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Lecturer Details

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

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Fields & Relationships

7 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

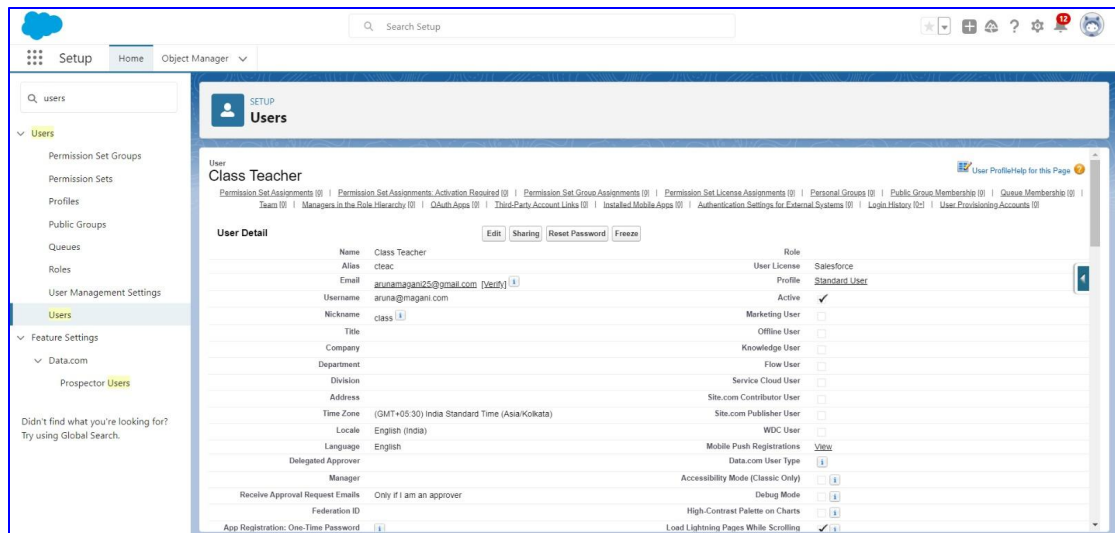
Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-----------------------|------------------|------------------------|-------------------|---------|
| Course | Course__c | Lookup(Course Details) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Lecturer Details Name | Name | Text(80) | | ✓ |
| Lecturer Name | Lecturer_Name__c | Text(40) | | |
| Lecturer Role | Lecturer_Role__c | Text(40) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |

| | | |
|----------------|------------------|----------------------|
| Course Details | Course Name | Text(Standard field) |
| | Duration (Years) | Number |

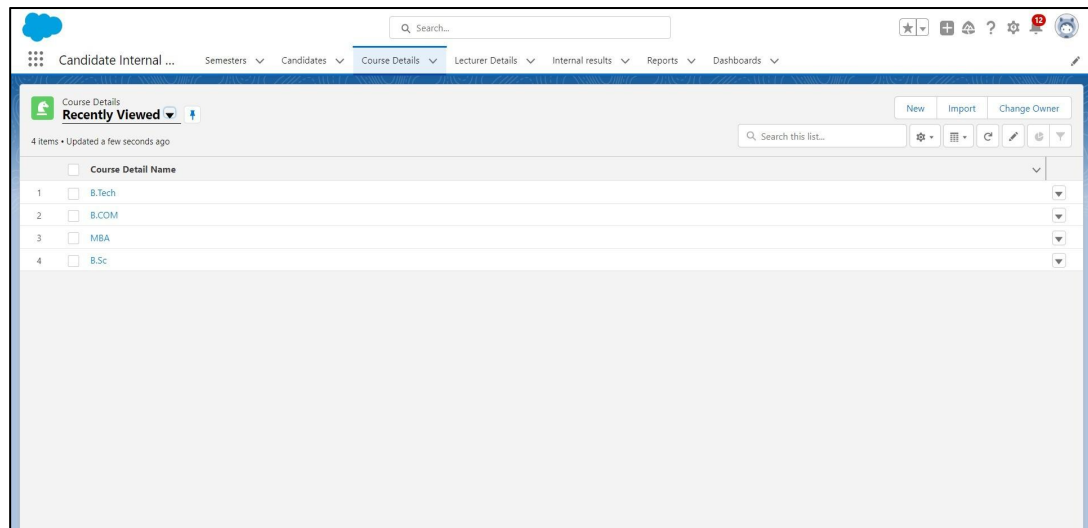
Creating New User:

- ◆ First Name : Class
- ◆ Last Name : Teacher
- ◆ Email Address : arunamagani25@gmail.com
- ◆ Unique Username : aruna@magani.com



Create Records in Candidate Internal Result Card App :

I am creating some record in all fields.



Creating Report in Candidate Result card App :

- ◆ Click App Launcher
- ◆ Select Candidate Internal Result Card App
- ◆ Click reports tab
- ◆ Click New Report.
- ◆ Click the report type as Semesters with Course Click Start report.
- ◆ Customize your report, in group rows select - Course Name, in group columnSelect Duration (In this way we are making a Matrix Report).
- ◆ Click refresh

- ◆ Click save and run
- ◆ Give report name – Candidate Internal Result Report
- ◆ Click Save

Report: Semesters with Course
Candidate Internal Result Report

Total Records: 4

| Course: Course Details Name | Course: Duration | Record Count | Total |
|-------------------------------|------------------|--------------|-------|
| <input type="checkbox"/> BCCA | Record Count | 2 | 2 |
| <input type="checkbox"/> BSC | Record Count | 1 | 1 |
| <input type="checkbox"/> MBA | Record Count | 1 | 1 |
| Total | Record Count | 4 | 4 |

Details (4 Rows) Click an intersection in the table above to filter details.

| Semester: Semester Name |
|-------------------------|
| 1 2semester |
| 2 3semester |
| 3 1semester |
| 4 4semester |
| 5 |

Row Counts: ☐ Detail Rows: ☒ Grand Total: ☒ Stacked Summaries: ☒

Create Dashboard :

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

