

Project Report Template

1. Introduction

1.1 Overview

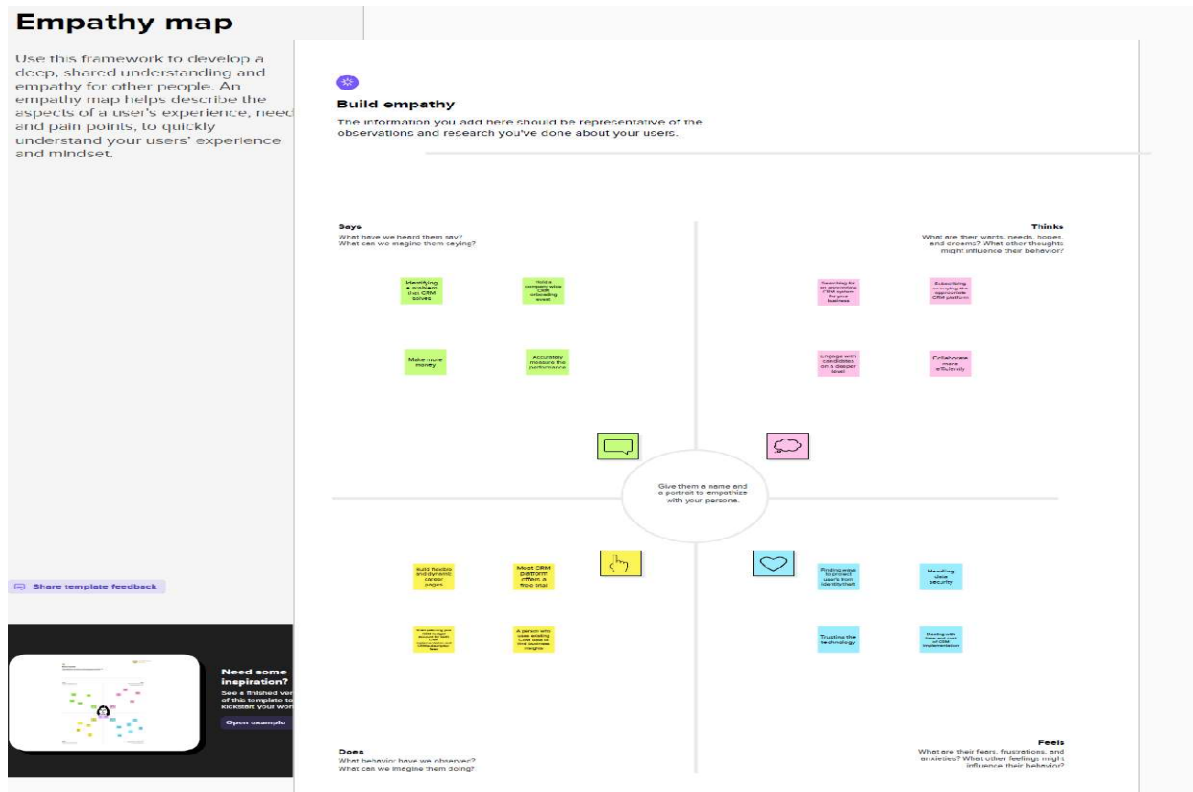
As a learner we should be able to create all base data including semester, candidate, course details and Lecturer details. Lecture should have the ability to create internal results.

1.2 Purpose:

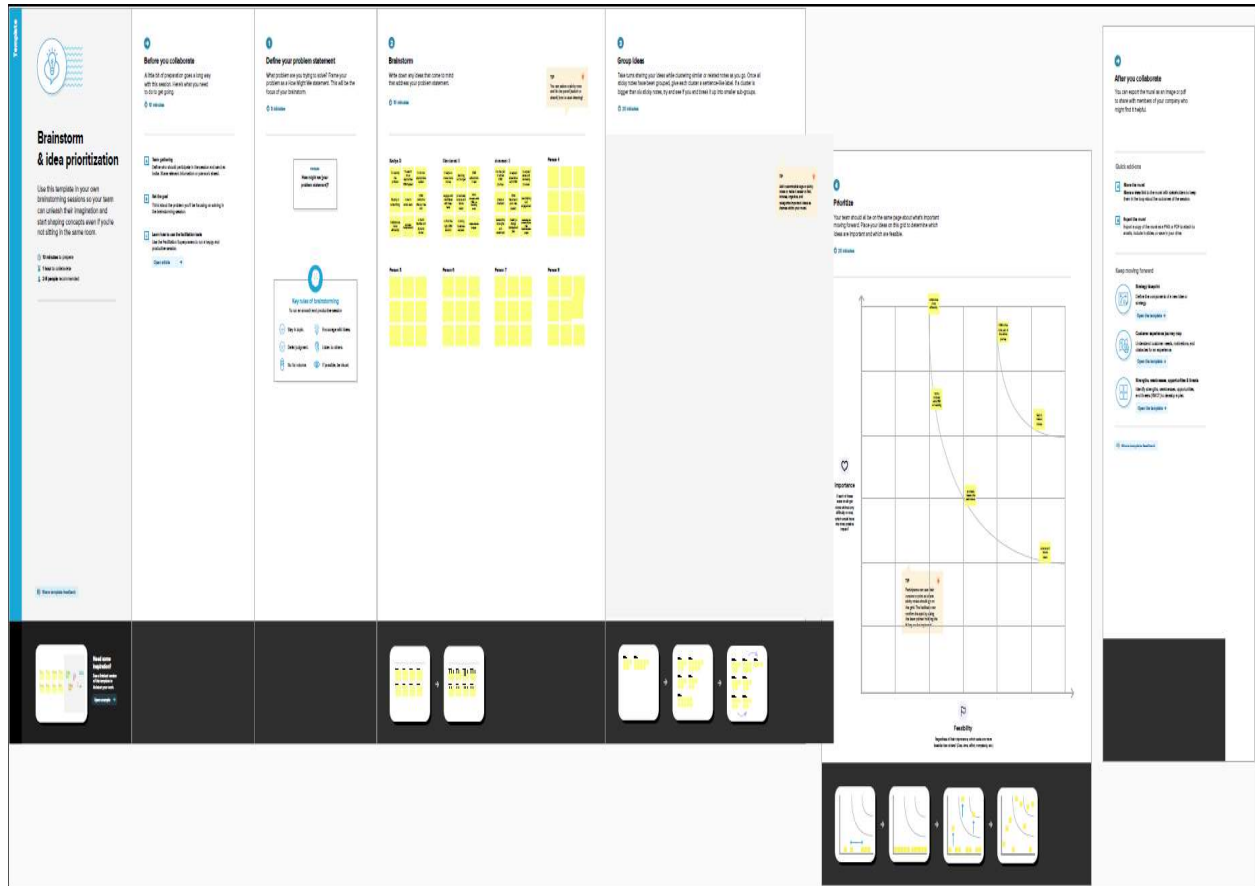
Implementing CRM for the result tracking of a candidate with internal marks.

2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming



3.Result:

3.1 Data Model:

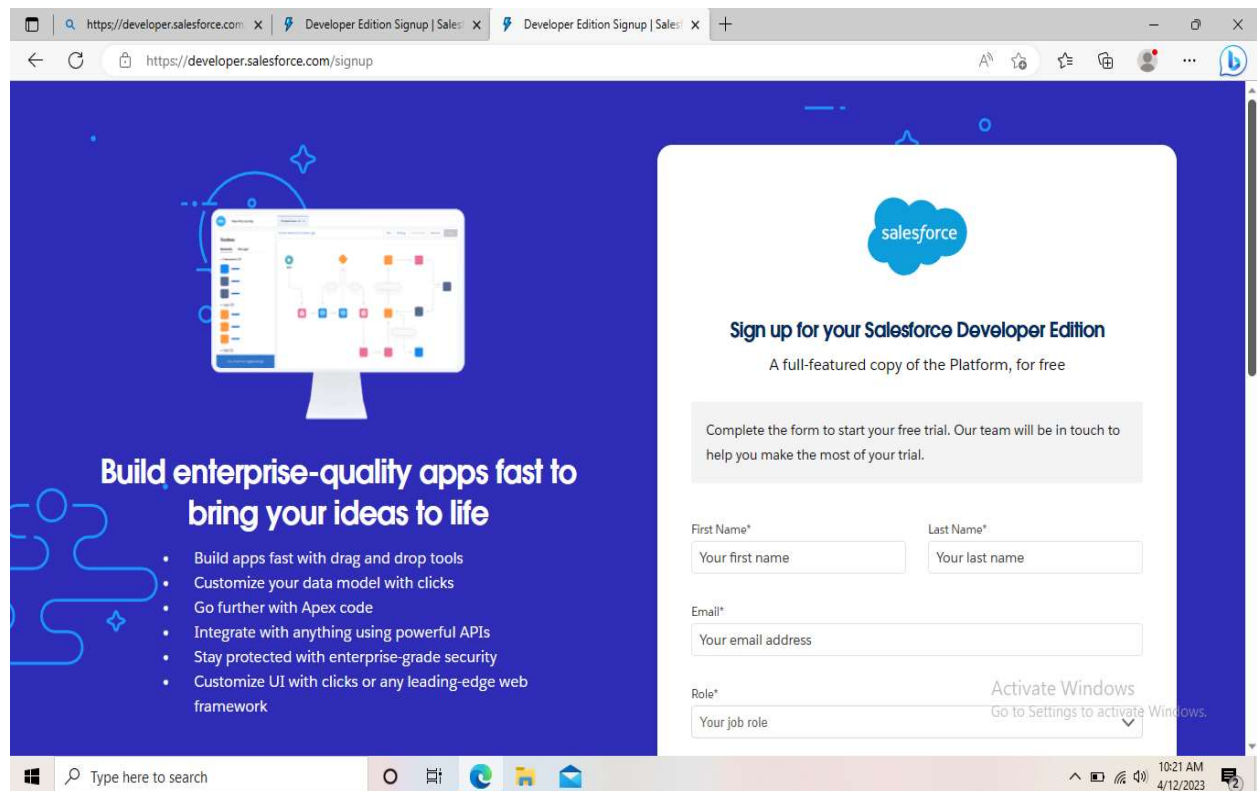
Object Name	Fields in the object	
Semester	Field Lable	Data Type
	Semester Name	Text
	Course	Text
Candidate	Field Lable	Data Type
	Candidate Name	Text
	Candidate ID	Text
	Semester Name	Text
	Internal Results	Text
Course Details	Field Lable	Data Type
	Course Name	Text

	Course ID	Text
Lecturer Details	Field Lable	Data Type
	Lecturer Role	Text
	Lecturer Name	Text
	Course ID	Text
	Course	Text
Internal Results	Field Lable	Data Type
	Candidate ID	Text
	Course ID	Text
	Marks	Text

3.2 Activity & Screenshot:

Activity 1:

Creating Developer org in salesforce.



• Customize UI with clicks or any leading-edge web framework

Role*
Your job role

Company*
Company Name

Country/Region*
Select Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Sign me Up

Activate Windows
Go to Settings to activate Windows.

1. Go to developers. Salesforce.com/
2. Click on sign up.
3. On the signup form, enter the following details:
 - a. First name & Last name
 - b. Email.
 - c. Company: Government Arts and Science College, Tittagudi.
 - d. Country: India
 - e. Postal code: 606 106
 - f. User name : is the combination of name and company (This need not be an actual email id)
 - g. Goto inbox of our email – click verify account to activate the salesforce developer account.

How to login to the salesforce account:

Go to salesforce.com and click on login

Enter the username and password that you just created

After login the Home page will be display

Salesforce Login: <https://login.salesforce.com>

Activity 1:

Salesforce objects are two types:

- ❖ Standard objects
- ❖ Custom objects

To create an object:

Creation of objects for Candidate Internal Result Card, For this app we need to create 5 object, there are (Semester, Candidate, Course details, Lecturer Details and Internal results).

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar displays the URL: `governmentartsandsciencecolleget19.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. A message at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes the following fields:

- Label:** SEMESTER (Example: Account)
- Plural Label:** SEMESTERS (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** SEMESTER (Example: Account)
- Description:** (Empty text box)

The Windows taskbar at the bottom shows the time as 9:06 AM on 4/12/2023.

Home | Salesforce x New Custom Object | Salesforce x +

governmentartsandsciencecolleget19.lightning.force.com/lightning/setup/ObjectManager/new

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Search Setup

Setup Home Object Manager ▾

SETUP New Custom Object

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name --None-- ▾

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name SEMESTER Name Example: Account Name

Data Type Text ▾

Optional Features

☒ Allow Reports

Type here to search

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Setup Home Object Manager ▾

SETUP New Custom Object

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing ⓘ

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

Search Status

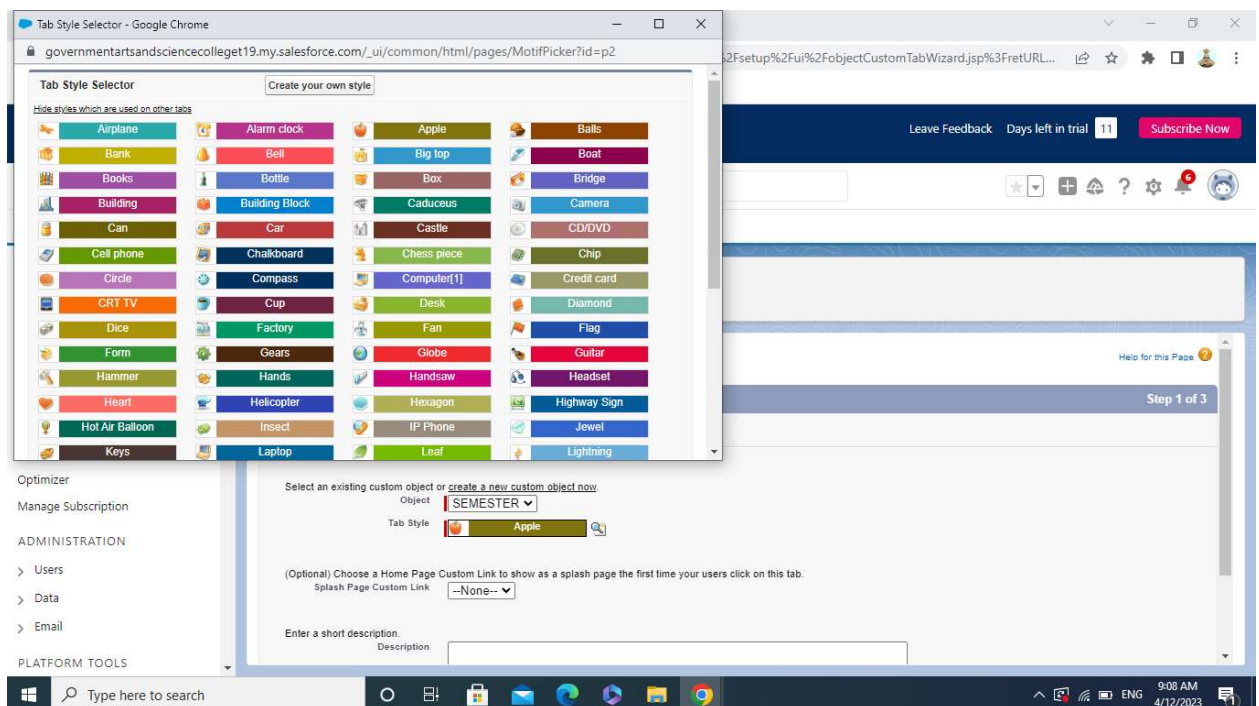
Type here to search

9:06 AM 4/12/2023

The following steps can be used for object creation.

- Click on the gear icon and then select setup.
- Click on the object manager tab.
- Click create and select custom object.
- On the custom object page
- Label: type Semester
- Plural Label: Semesters
- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click save

Next we have created a Custom Tab



Home | Salesforce x Home | Salesforce x +

governmentartsandsciencecolleget19.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...

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Search Setup

Setup Home Object Manager ▾

Quick Find

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Manage Subscription
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS

SETUP
Tabs

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

Object SEMESTER
Tab Style Apple

(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 --None--

Enter a short description.
Description

Next Cancel

Type here to search

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Home | Salesforce x Home | Salesforce x +

governmentartsandsciencecolleget19.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...

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Search Setup

Setup Home Object Manager ▾

Quick Find

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Manage Subscription
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS

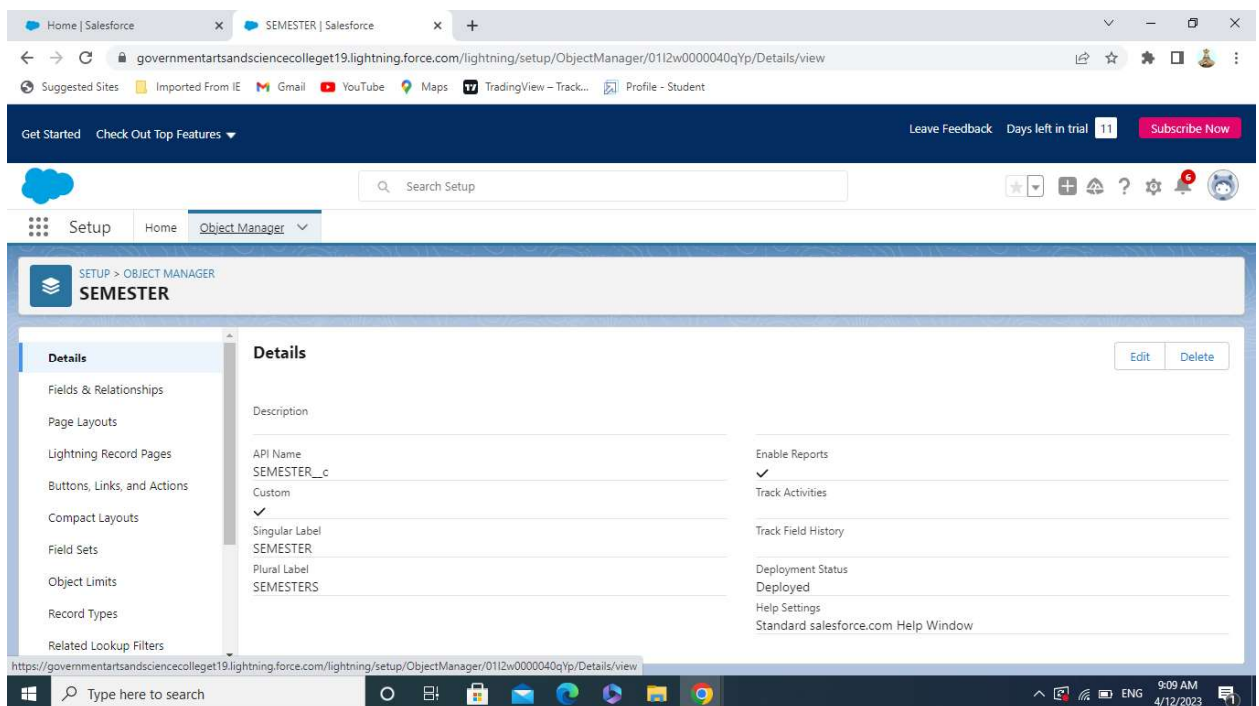
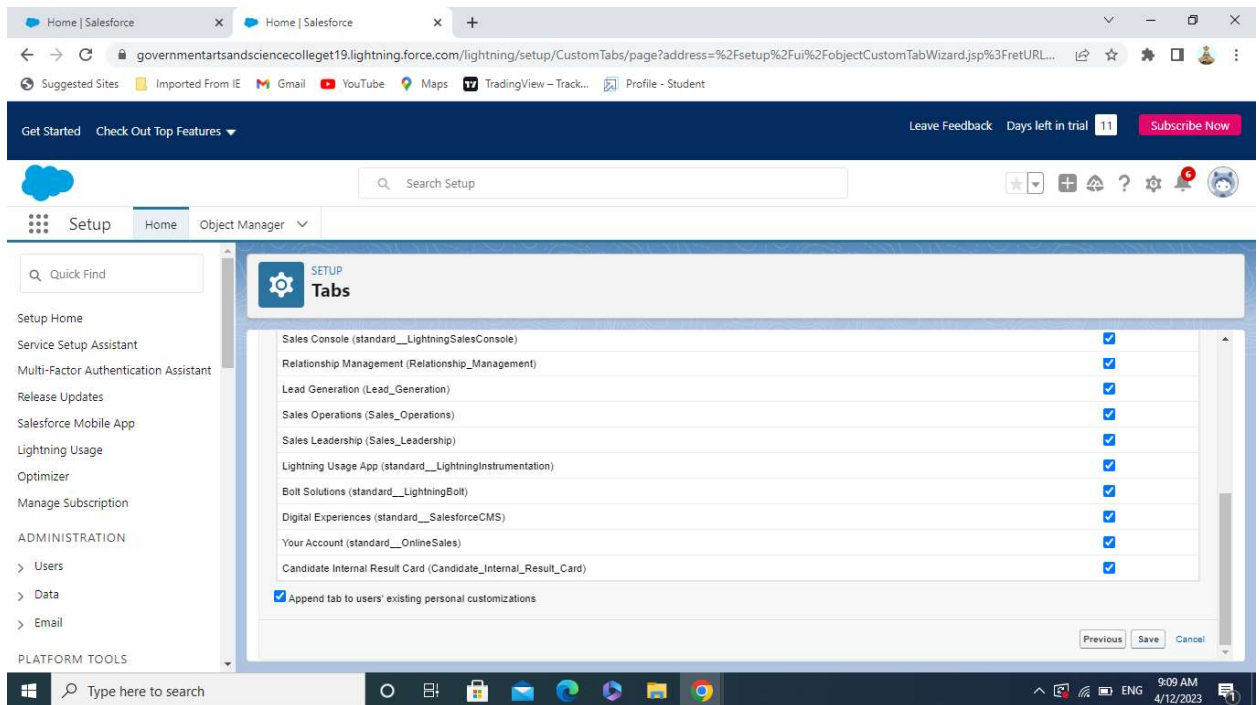
SETUP
Tabs

CPQ Integration User Default On ▾
End User Default On ▾
Executive Sponsor Default On ▾
Identity User Default On ▾
Marketing User Default On ▾
Minimum Access - Salesforce Default On ▾
Read Only Default On ▾
Solution Manager Default On ▾
Standard User Default On ▾
System Administrator Default On ▾

Previous Next Cancel

Type here to search

9:09 AM 4/12/2023



- Click the Home tab, type 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.

Activity 2:

Similarly we have created all other Objects (Candidate, Course Details, Lecturer Details and Internal Results).

Fields & Relationship:

Activity 1:

Creation of fields:

The screenshot shows the Salesforce Setup interface for creating a new field. The browser address bar displays the URL: `governmentartsandsciencecolleget19.lightning.force.com/lightning/setup/ObjectManager/0112w0000040qYp/FieldsAndRelationships/new`. The page title is "SETUP > OBJECT MANAGER SEMESTER". The left sidebar shows the "Fields & Relationships" section selected. The main content area is titled "Step 4. Add to page layouts" and shows the field details for "COURSE" (Text type). The field is being added to the "SEMESTER Layout". The "Add Field" checkbox is checked, and the "Page Layout Name" is "SEMESTER Layout". The "When finished, click Save & New to create more custom fields, or click Save if you are done." instruction is visible. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Home | Salesforce x SEMESTER | Salesforce x +

governmentartsandsciencecolleget19.lightning.force.com/lightning/setup/ObjectManager/0112w0000040qYp/FieldsAndRelationships/new

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Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER SEMESTER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label	COURSE
Data Type	Text
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field Page Layout Name

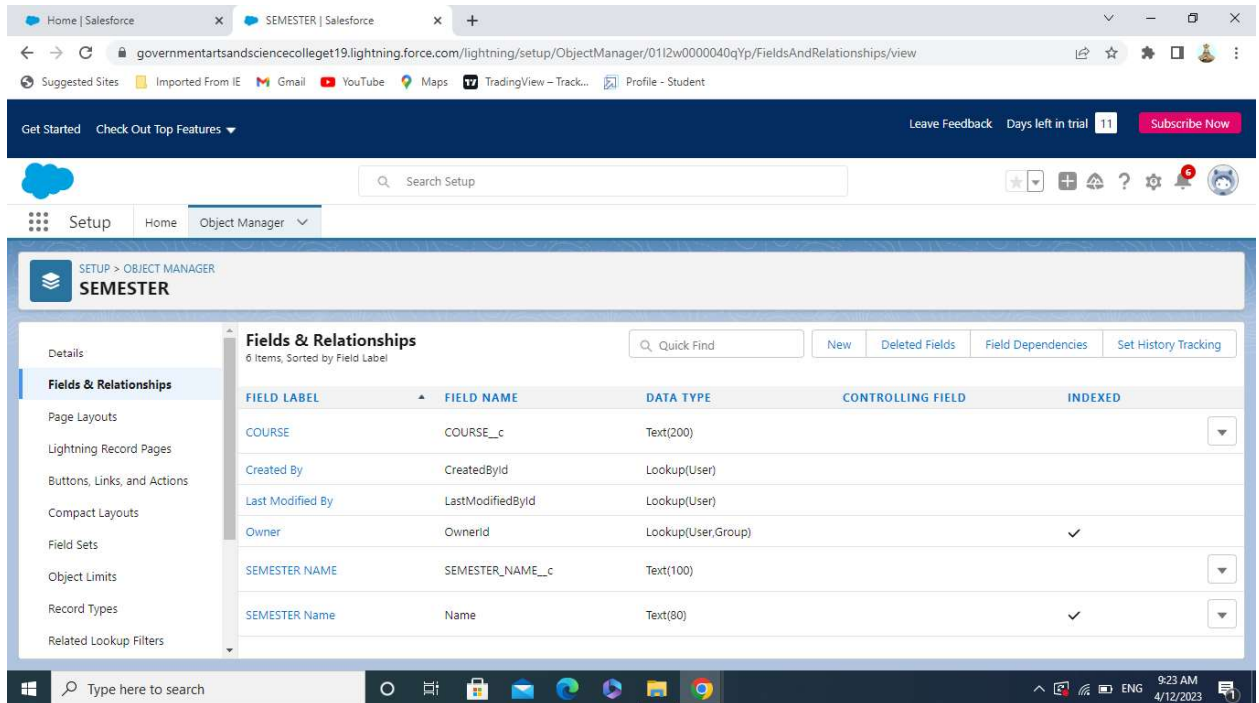
☒ SEMESTER Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Type here to search

9:22 AM 4/12/2023



- Click the gear icon and select setup
- Click on object manager
- Type object name as Semester in search bar
- Click on the Semester object
- Click on Fields & Relationships
- Click New
- Type the Field Name as Semester Name
- Go to Next, Next and Save.

Activity 2:

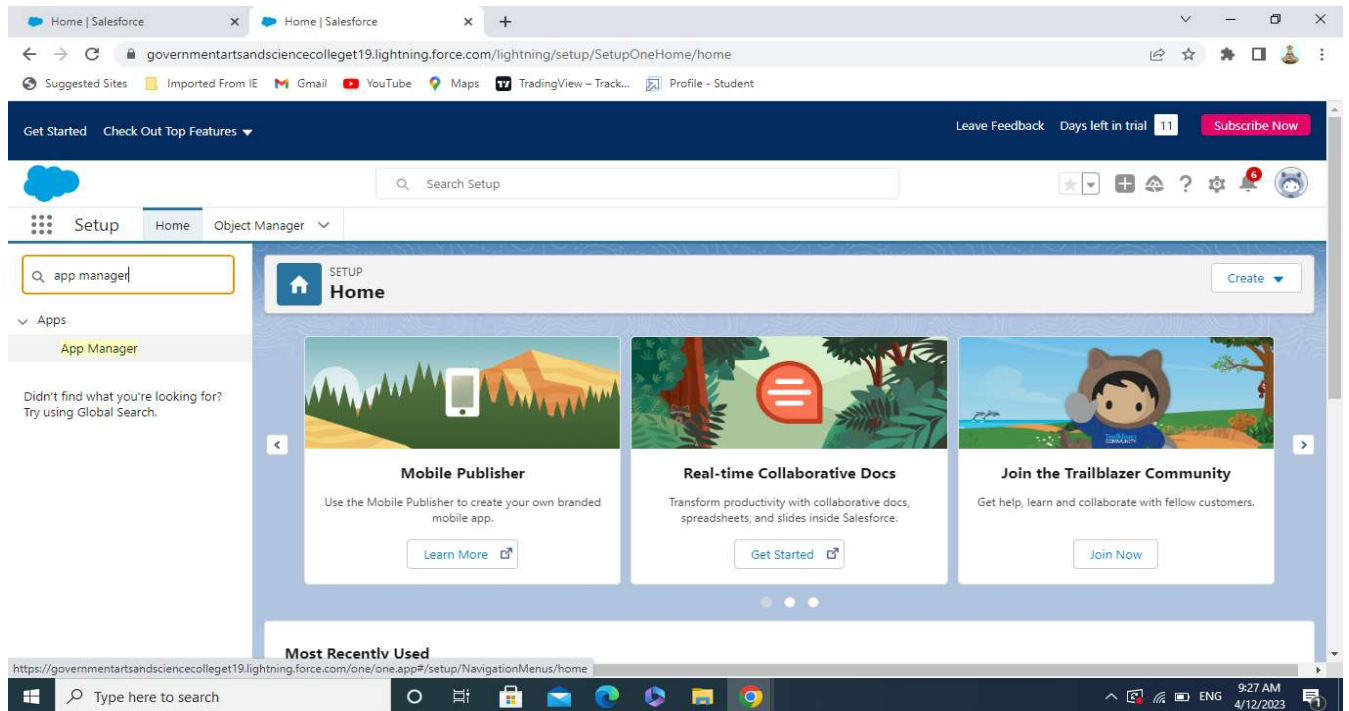
Similarly we have created the following Fields according to the objects.

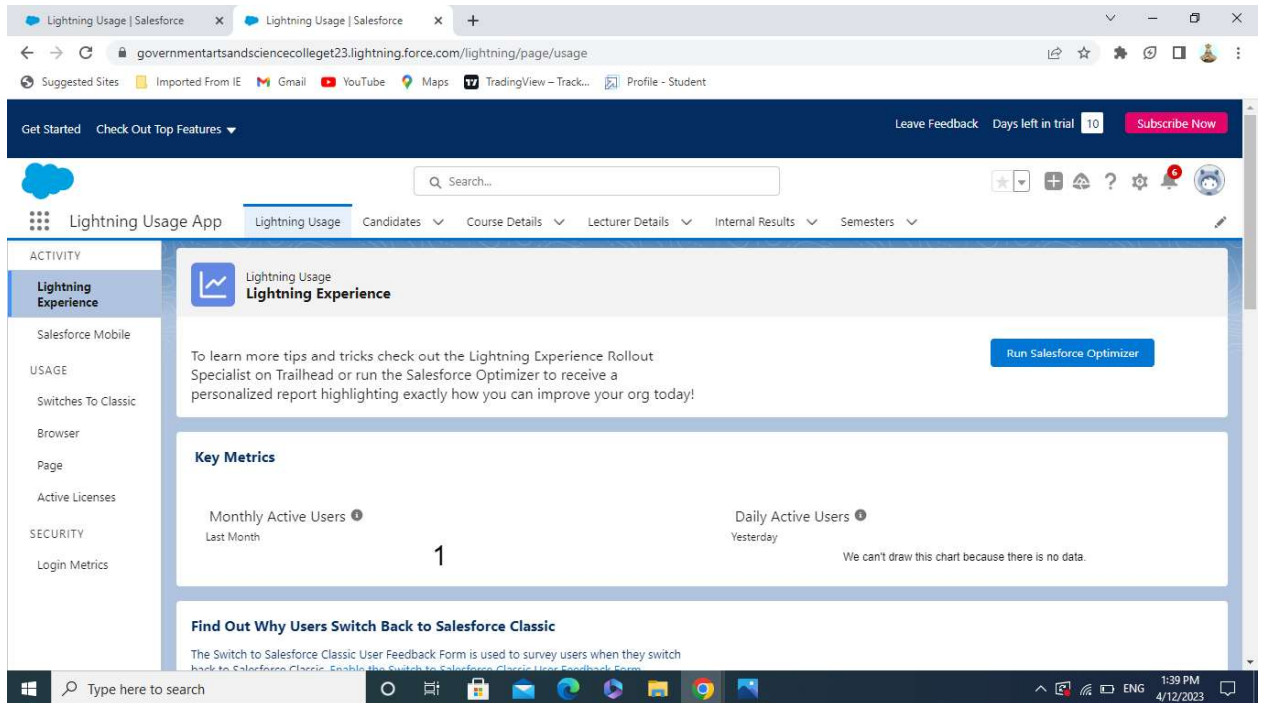
Semester	Candidate	Course Details	Lecturer Details	Internal Results
Semester Name	Candidate Name	Course Name	Lecturer Role	Candidate ID
Course	Candidate ID	Course ID	Lecturer Name	Course ID
	Semester Name		Course ID	Marks
	Internal Results		Course	

Lightning App Creation:

Activity 1:

Create the Candidate Internal Result Card App:



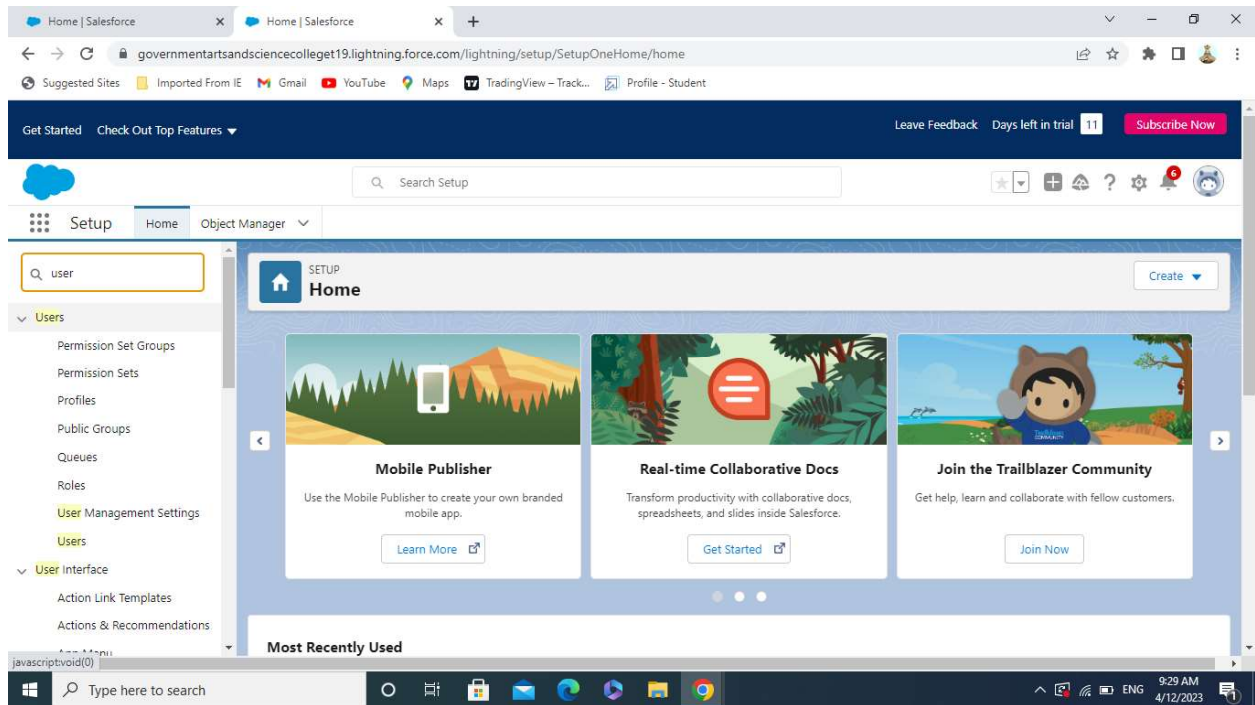


- Go to Setup, type App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Type Candidate Internal Result Card as the App Name and then click Next
- Under App options, leave the default selections and click Next
- Under Utility items, leave as is and click Next
- From Available items, select Semester, Candidate, Course Details, Lecturer Details, Internal Results and move them to Selected Items. Click Next.
- From available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify the changes go to App launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.

Users:

Activity 1:

Creating a Users:



The screenshot shows the Salesforce Setup page for Users. The page title is 'All Users'. Below the title, there is a description: 'On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android'. There are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Below these buttons is a table of users.

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter_00d2v00000p2o5eab.1yicv89i0e@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
Edit	GA-SCT-sivanesan03	sGASCT	sivanesansivanesan805-otmv@force.com	12/04/2023, 9:02 am		<input checked="" type="checkbox"/>	System Administrator
Edit	Sivakumar Sivakankari	ssiva	sivanesansivanesan805@gmail.com	01/04/2023, 10:19 am		<input checked="" type="checkbox"/>	Minimum Access - Salesforce
Edit	Sponsor_Exec	sspon	execsponsor_d4mfunnvoodq.ydn1o53vrvbe@example.com			<input type="checkbox"/>	End User

At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

- From Setup, in the Quick Find box, type Users and then select Users.
- Click New User
- Enter User's Name and email address and unique username in the form of an email address.
- Select a Role (none)
- Select a User Licence as salesforce
- Select a profile as salesforce User.
- Generate new password and notify the user immediately to have the user's login name and a temporary password mailed to our email.

Reports:

Activity 1:

Reports & Dashboards:

The screenshot displays the Salesforce Report Builder interface. A 'Save Report' dialog box is open, requiring the following information:

- *Report Name:** Candidate with Candidate Marks
- Report Unique Name:** New_CANDIDATES_Report_gpX

The background shows a report outline for 'CANDIDATES' with the following columns:

CANDIDATE: CANDIDATE Name	Candidate ID	Semester Name	Internal Result
1 S Sivanesan	13120U28003	VI	24
2 R Lavanya	13120U28007	VI	24
3 R Karthikeyan	13120U28010	VI	24
4 S Silambarasi	13120U28002	VI	23
5 S Aakash	13120U28004	VI	22
6 R Rathika	13120U28005	VI	21
7 M Monisha	13120U28008	VI	23
8 D Kaviya	13120U28001	VI	24
9 R Vijay	13120U28009	VI	22
10 V Anusri	13120U28006	VI	20

Home | Salesforce x Candidate with Candidate Marks x

governmentartsandsciencecolleget19.lightning.force.com/lightning/r/Report/00O2w00000E5unsEAD/view

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Report: CANDIDATES
Candidate with Candidate Marks

Enable Field Editing Add Chart Edit

Total Records
10

	CANDIDATE: CANDIDATE Name	Candidate ID	Semester Name	Internal Result
1	S Sivanesan	13120U28003	VI	24
2	R Lavanya	13120U28007	VI	24
3	R Karthikeyan	13120U28010	VI	24
4	S Silambarasi	13120U28002	VI	23
5	S Aakash	13120U28004	VI	22
6	R Rathika	13120U28005	VI	21
7	M Monisha	13120U28008	VI	23
8	D Kaviya	13120U28001	VI	24

To Do List

Type here to search

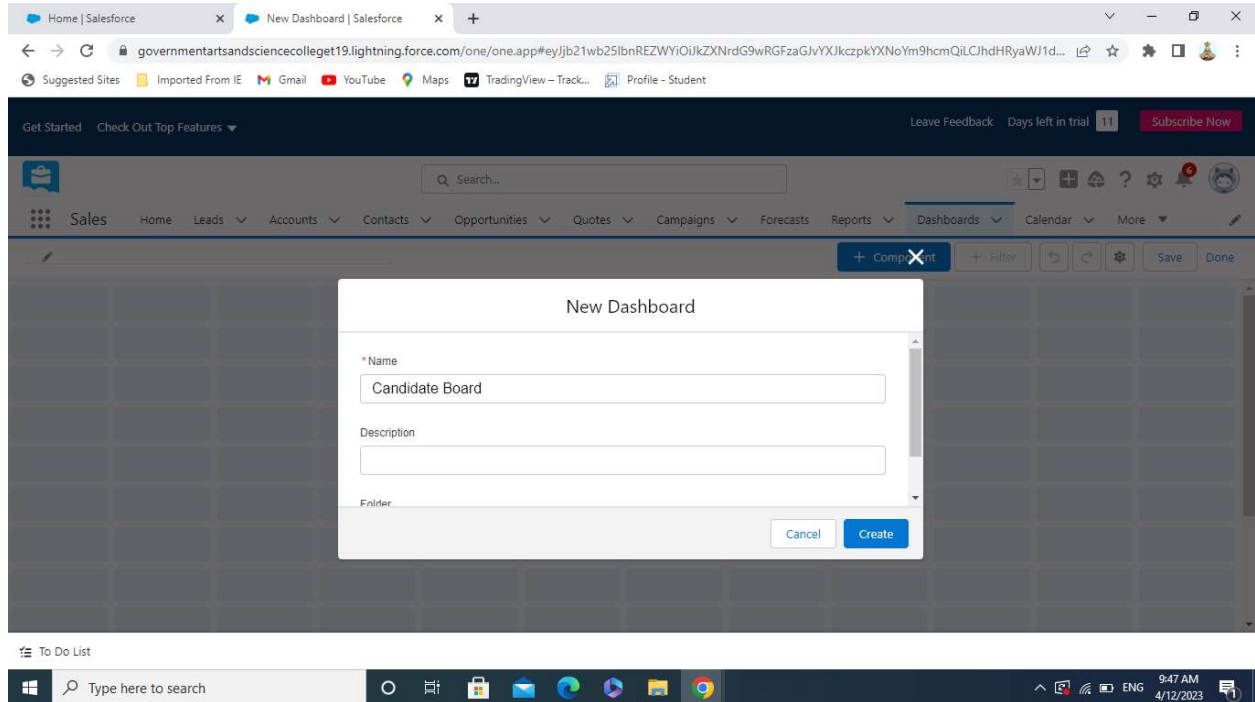
9:42 AM 4/12/2023

- Go to the app
- Click on the Reports tab, click New Report
- Select the report type from the category (Candidate)
- Click on start report
- Customize your report, then save or run it
- Type the Report name as Candidate with Candidate Marks, click save
- The Report page display, click Save & Run

Dashboards:

Activity 1:

Create a Dashboard:



The screenshot shows the Salesforce 'New Dashboard' dialog box. The 'Name' field is filled with 'Candidate Board'. The 'Description' and 'Folder' fields are empty. The 'Create' button is highlighted in blue.

Home | Salesforce x New Dashboard | Salesforce x

governmentartsandsciencecolleget19.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJkZXNrdG9wRGFzaGJvYXJkczpkYXNoYm9hcmQlCjdhHRyaWJ1d...

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+ Component + Filter ↺ ↻ ⚙ Save Done

New Dashboard

*Name
Candidate Board

Description

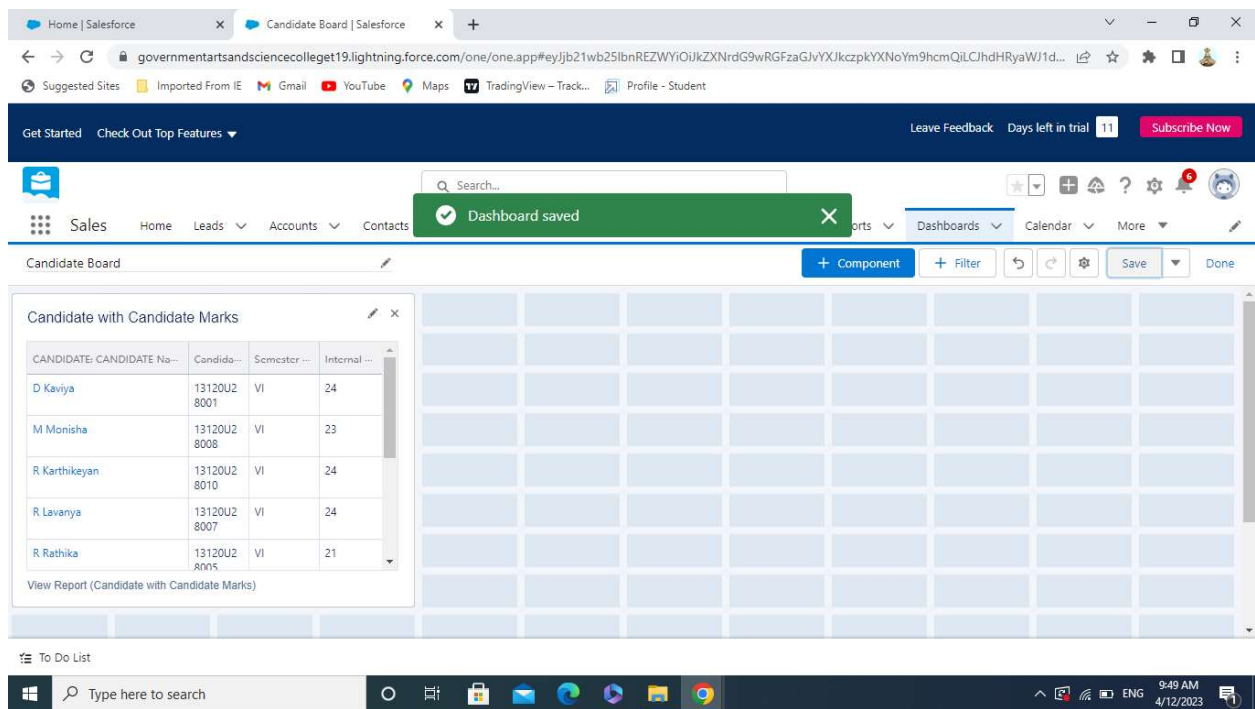
Folder

Cancel Create

To Do List

Type here to search

9:47 AM 4/12/2023



The screenshot shows the Salesforce 'Candidate Board' dashboard. A green notification banner at the top says 'Dashboard saved'. The dashboard contains a table titled 'Candidate with Candidate Marks' with 5 rows of data. The table has columns: CANDIDATE, CANDIDATE No..., Candido..., Semester..., and Internal ...

Home | Salesforce x Candidate Board | Salesforce x

governmentartsandsciencecolleget19.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJkZXNrdG9wRGFzaGJvYXJkczpkYXNoYm9hcmQlCjdhHRyaWJ1d...

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Search...

Sales Home Leads ▾ Accounts ▾ Contacts ▾ Opportunities ▾ Quotes ▾ Campaigns ▾ Forecasts Reports ▾ Dashboards ▾ Calendar ▾ More ▾

+ Component + Filter ↺ ↻ ⚙ Save Done

Candidate Board

Candidate with Candidate Marks

CANDIDATE, CANDIDATE No...	Candido...	Semester...	Internal ...
D Kaviya	13120U2 8001	VI	24
M Monisha	13120U2 8008	VI	23
R Karthikeyan	13120U2 8010	VI	24
R Lavanya	13120U2 8007	VI	24
R Rathika	13120U2 8005	VI	21

View Report (Candidate with Candidate Marks)

To Do List

Type here to search

9:49 AM 4/12/2023

The screenshot shows a Salesforce interface with a dashboard titled "Candidate Board". The dashboard displays a table with the following data:

CANDIDATE: CANDIDATE Na...	Candida...	Semester --	Internal R...
D Kaviya	13120U28 001	VI	24
M Monisha	13120U28 008	VI	23
R Karthikeyan	13120U28 010	VI	24
R Lavanya	13120U28 007	VI	24
R Rathika	13120U28 005	VI	21

Below the table, there is a link: "View Report (Candidate with Candidate Marks)".

- Create the Dashboards tab
- Click the Dashboard tab
- Click New Dashboard
- Name the Dashboard as Candidate Board. Leave all other fields as is and click Create
- Click + Component
- For Report, select Candidate with Candidate Marks, Click Select
- For Display as, select any chart and click Add
- Click Save
- Click Done

4. Trailhead Profile Public URL:

- **Team Lead-** <https://trailblazer.me/id/kkasi34>
- **Team Member 1-** <https://trailblazer.me/id/ssilambarasi>
- **Team Member 2-** <https://trailblazer.me/id/ssivanesan6>

5. Advantages & Disadvantage:

Advantages:

- It is used to tracking the internal result of the students.

Disadvantages:

- If manual error occurs during the feeding of data it is difficult to be altered.

6. Applications:

- It can be used to track the internal mark of the students.
- It can be tracked anywhere through online mode.

7. Conclusion:

- It is easiest method to track the students internal result and also it can be tracked anywhere through online mode.

8. Future Scope:

- Students date of birth can be included for verifying students.
- External marks can be included so result analysis can be done easily.