



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

PROJECT BASED EXPERIENCE LEARNING PROGRAM



SRI VENKATESWARA COLLEGE OF ENGINEERING

Project submitted by:-

TEAM LEADER : PIDUGU. NAGA PRANATHI
TEAM MEMBERS : KARNATI. NEHA REDDY
ALAVALAPATI. MANASA
CHINTAKUNTA. VENKATA
SAI KUMAR REDDY



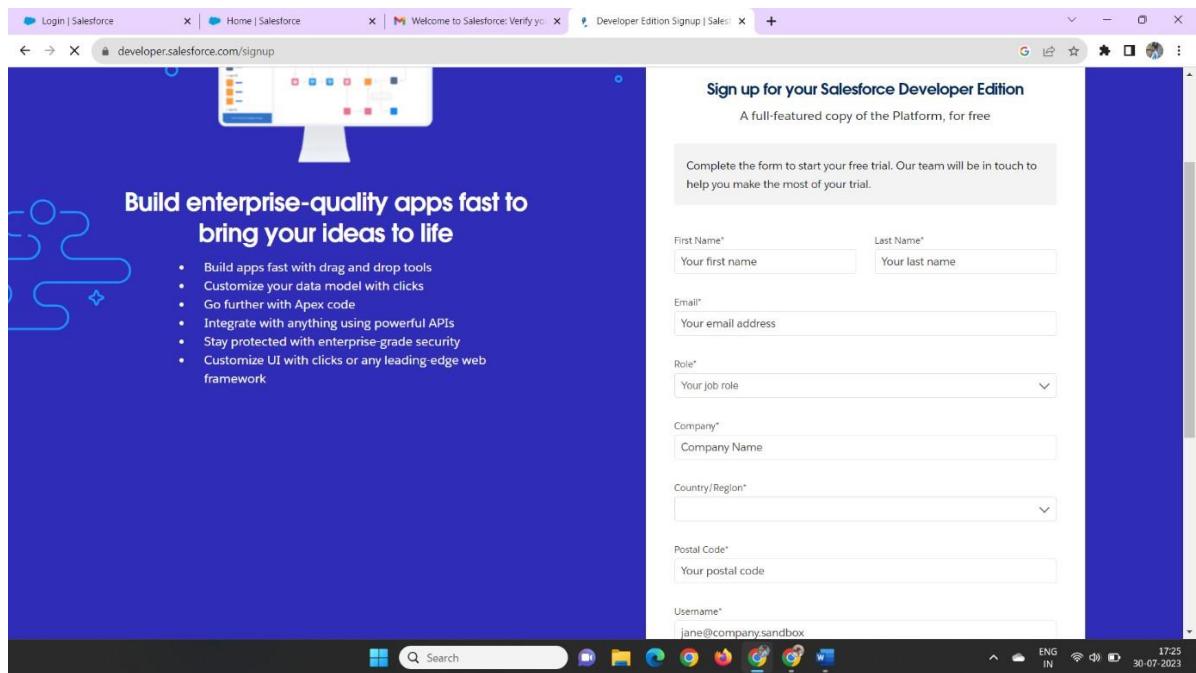
IMPLEMENTING CRM FOR RESULT

TRACKING OF A CANDIDATE WITH INTERNAL MARKS - (ADMIN)

PIDUGU. NAGA PRANATHI (TEAM LEADER)
KARNATI. NEHA REDDY (TEAM MEMBER)
ALAVALAPATI. MANASA (TEAM MEMBER)
CHINTAKUNTA VENKATA SAI KUMAR REDDY
(TEAM MEMBER)
M. VENKATANAGASIRISHA (TEAM MEMBER)

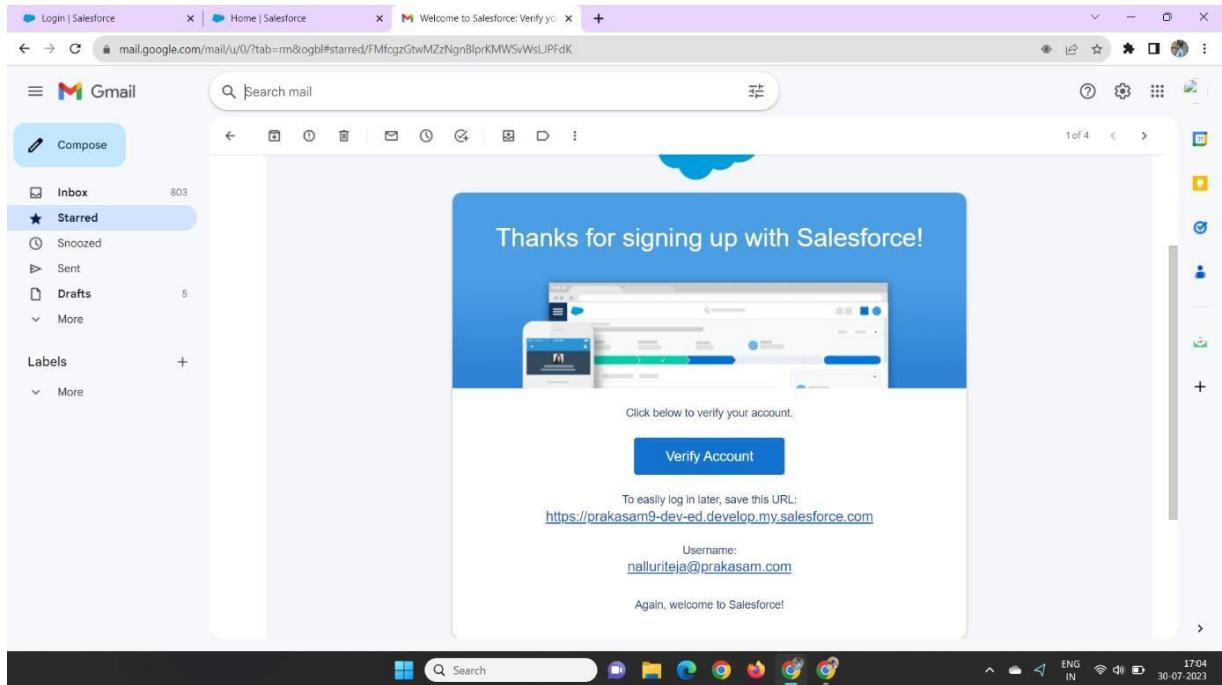
Step 1:

[Create Account by Using Salesforce Developer. signup](#)



Step 2:

First we Create the Developer Edition then We receive Mail Through the Salesforce

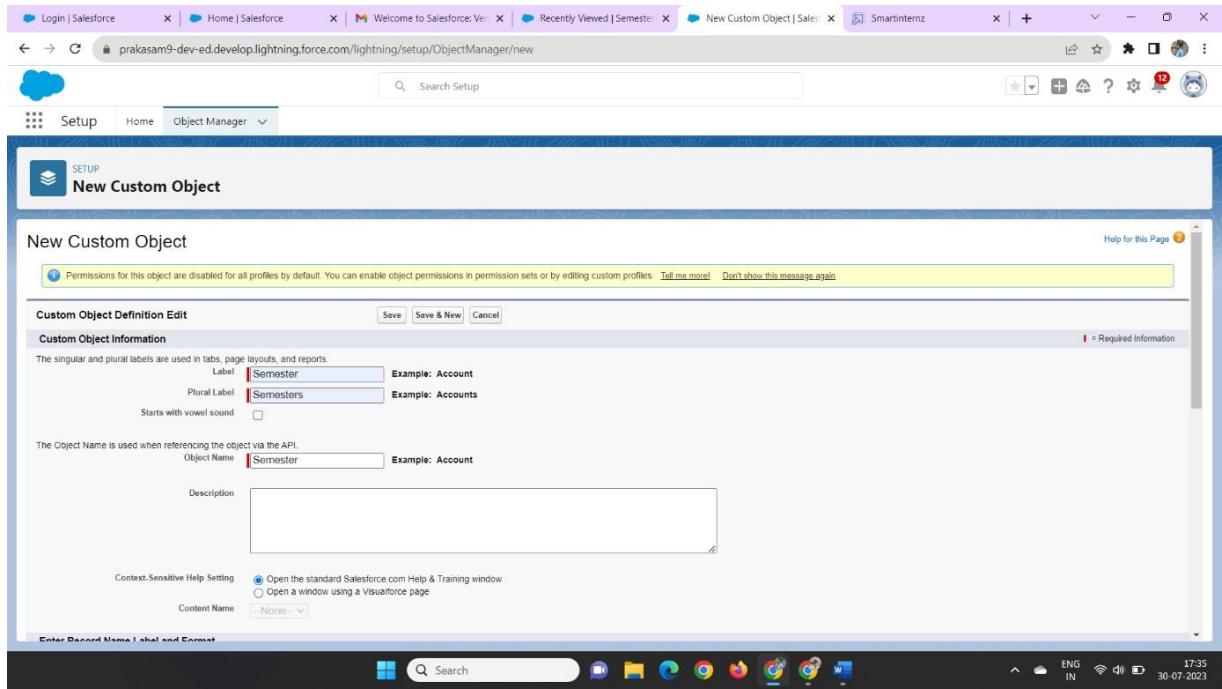


Later we Can Create the Password by Using the Manner

Step 3:

Creation of Semester Object for Candidate Internal Result Card

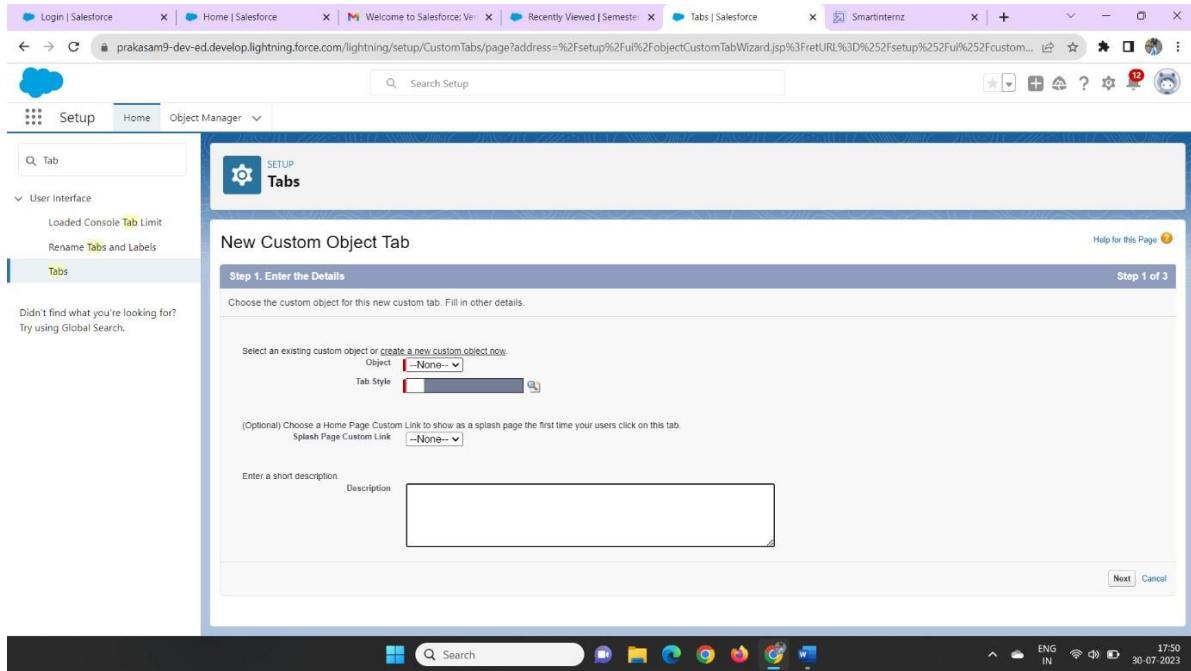
In Those Manner We Can Create Semester Object in The Object manner That Way We Can Create a Candidate, Course Details, Lecturer Details and Internal results



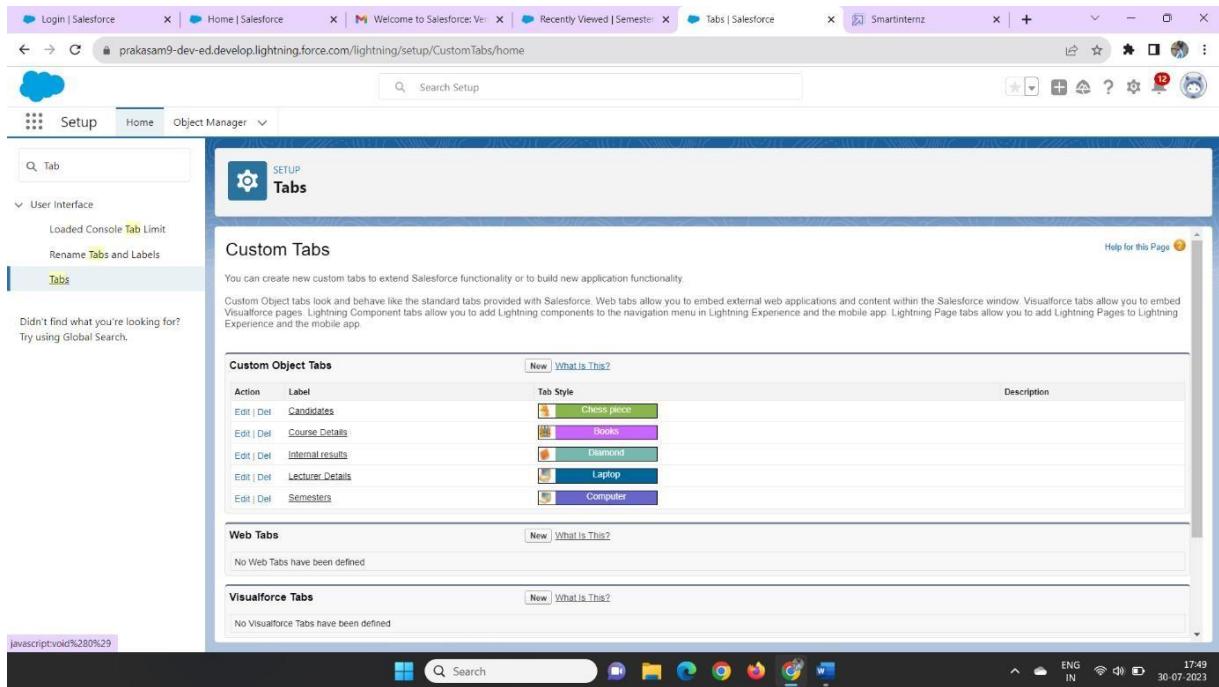
And Click the Checkbox Allow Reports, Allow Search

Step 4:

Creation of Semester Tab for Candidate Internal Result Card



Now We Can Create the Custom Object Tab by Using the Given Data.



Step 5:

Create The Candidate Internal Result Card App

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

In Those Manner We Can Create a **Candidate Internal Result Card** as the App

Name Now Click On the new Lightning app and create a new app managerial

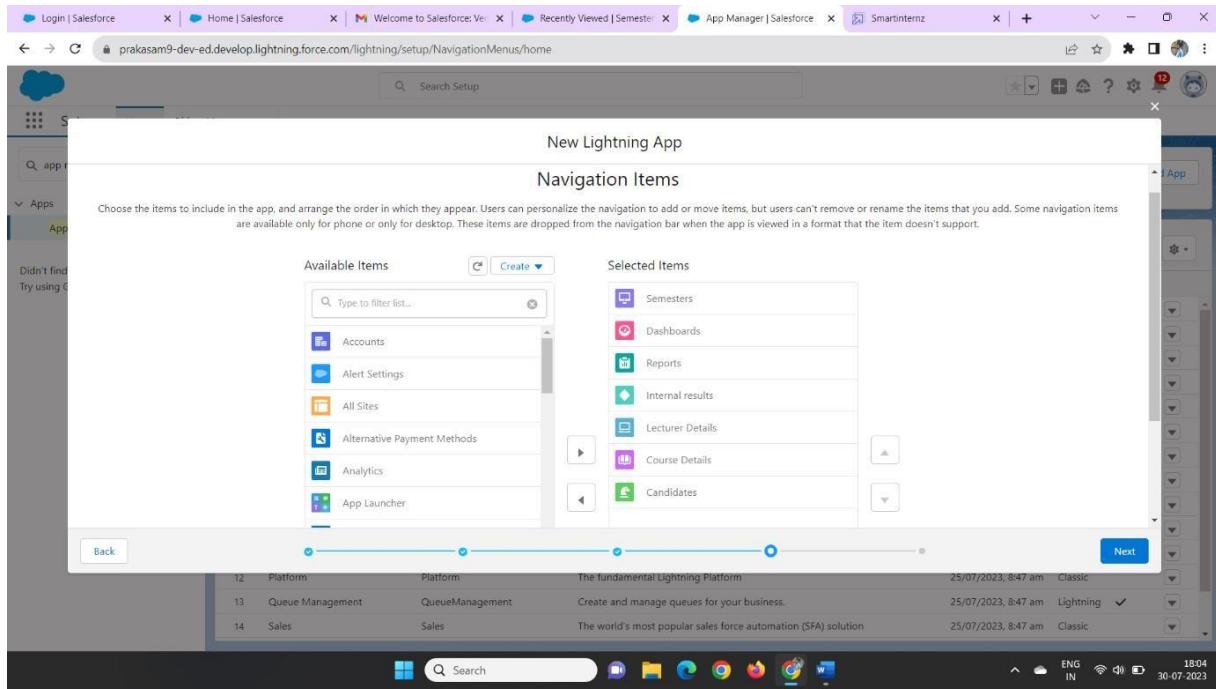
The App Manager can be Change use to show the data of the creation of the data manner of the containing to show the data of the progress

The screenshot shows the Salesforce App Manager interface. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. Under 'Apps', 'App Manager' is selected. A message says ' Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Lightning Experience App Manager' and displays a table of 22 items. The columns are 'App Name', 'Developer Name', 'Description', 'Last Modified...', 'App...', and 'Vi...'. The table lists various standard Salesforce apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

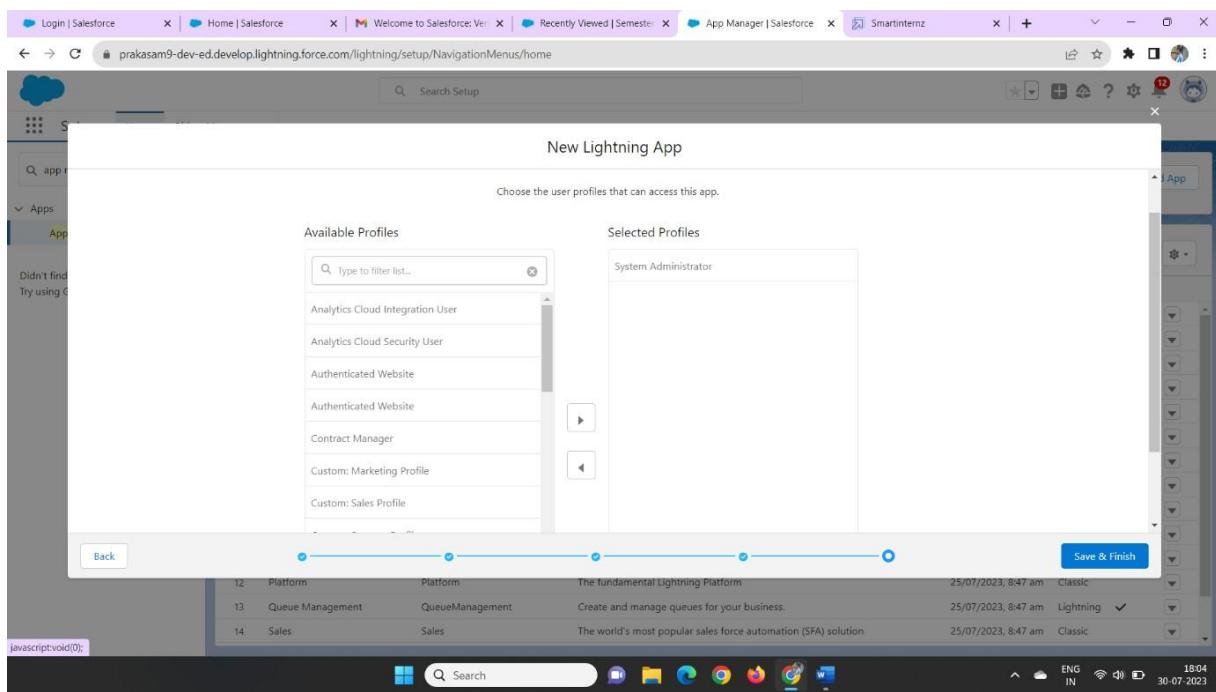
In those we Can Create a New lighting App

The screenshot shows the 'New Lightning App' configuration dialog. It has two main sections: 'App Details & Branding' and 'App Details'. In 'App Details', fields include 'App Name' (Candidate_Internal_Result_Card), 'Developer Name' (Candidate_Internal_Result_Card), and 'Description' (Enter a description...). In 'App Branding', there's a 'Primary Color Hex Value' (#0070D2) and an 'Image' upload field. Below these, there's an option 'Org Theme Options' with a checkbox. At the bottom right is a 'Next' button.

Then We Can Create the App Name as Candidate Internal Results Card Later we Can Click next, Next Then we Can Drag the **Semester, Candidate, Course Details, Lecturer Details, Internal results, Reports, and Dashboards** on The Right Side of the column



Then We Can Click Next Object Then We enter System administrator Profile and Click Save & finish.



Step 6:

Creation Of Text Field On " Lecturer Details" & Look Up Field for the “Candidate” Object

In Those Manner We Can Create a Lecturer Field Data on the on The Text Data type

The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: Login | Salesforce, Home | Salesforce, Welcome to Salesforce: Ver..., Recently Viewed | Semest..., Object Manager | Salesforce, and Smartinternz. Below the tabs, the URL is prakasam9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home. The main area is titled "Object Manager" with a subtitle "1 Items, Sorted by Label". A search bar at the top right contains the text "lectu". A table lists one item: "Lecturer Detail" with API Name "Lecturer_Detail__c", Type "Custom Object", Last Modified "25/07/2023", and Deployed status. The bottom of the screen shows a Windows taskbar with various icons and the date 30-07-2023.

We Can Enter The Data type on the field object then we can enter the lecturer role as the data type

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The title bar includes tabs for Login | Salesforce, Home | Salesforce, Welcome to Salesforce: Ver..., Recently Viewed | Semest..., Object Manager | Salesforce, and Smartinternz. The URL is prakasam9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j0000002TbfZ/FieldsAndRelationships/new. The main area is titled "Lecturer Detail New Custom Field". On the left, a sidebar lists various object settings like 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, and Scoping Rules. The central form is titled "Step 2. Enter the details" and "Step 2 of 4". It contains fields for "Field Label" (Lecturer Role), "Length" (45), "Field Name" (Lecturer_Role), "Description" (empty), and "Help Text" (empty). Below these are checkboxes for "Required", "Unique", and "External ID". The "Required" checkbox is unchecked. The "Unique" checkbox is checked, with a note: "Treat 'ABC' and 'abc' as duplicate values (case insensitive)". The "External ID" checkbox is checked, with a note: "Set this field as the unique record identifier from an external system". At the bottom, there are "Previous" and "Next" buttons, and a "Cancel" button. The bottom of the screen shows a Windows taskbar with various icons and the date 30-07-2023.

Later we can click next, next & save

In those we can create a lecturer role on the field label

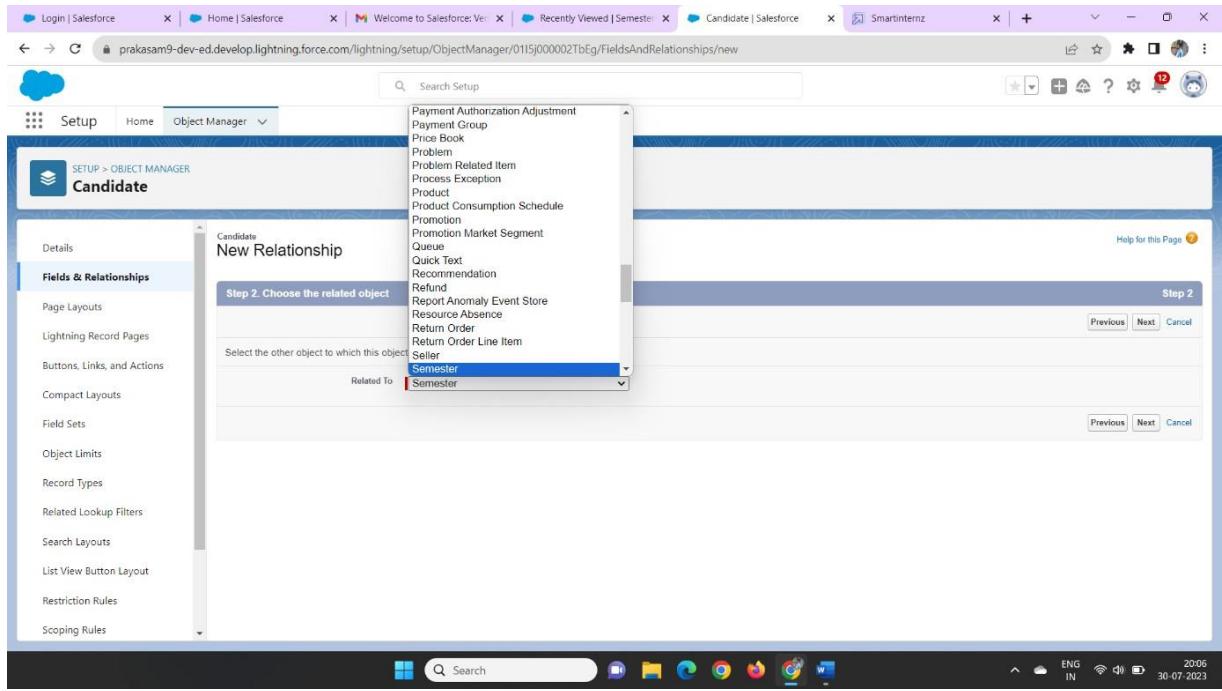
Later we can create a new candidate field in the Fields& Relationships

The screenshot shows the Salesforce Object Manager page. At the top, there are several tabs: Login | Salesforce, Home | Salesforce, Welcome to Salesforce, Recently Viewed | Semester, Object Manager | Salesforce, and Smartinternz. Below the tabs, the URL is prakasam9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home. The main header has a cloud icon, Setup, Home, and Object Manager. A search bar contains the text "candid". On the right, there are buttons for Schema Builder and Create, with a dropdown menu showing "Create". The main content area displays a table titled "Object Manager" with one item listed:

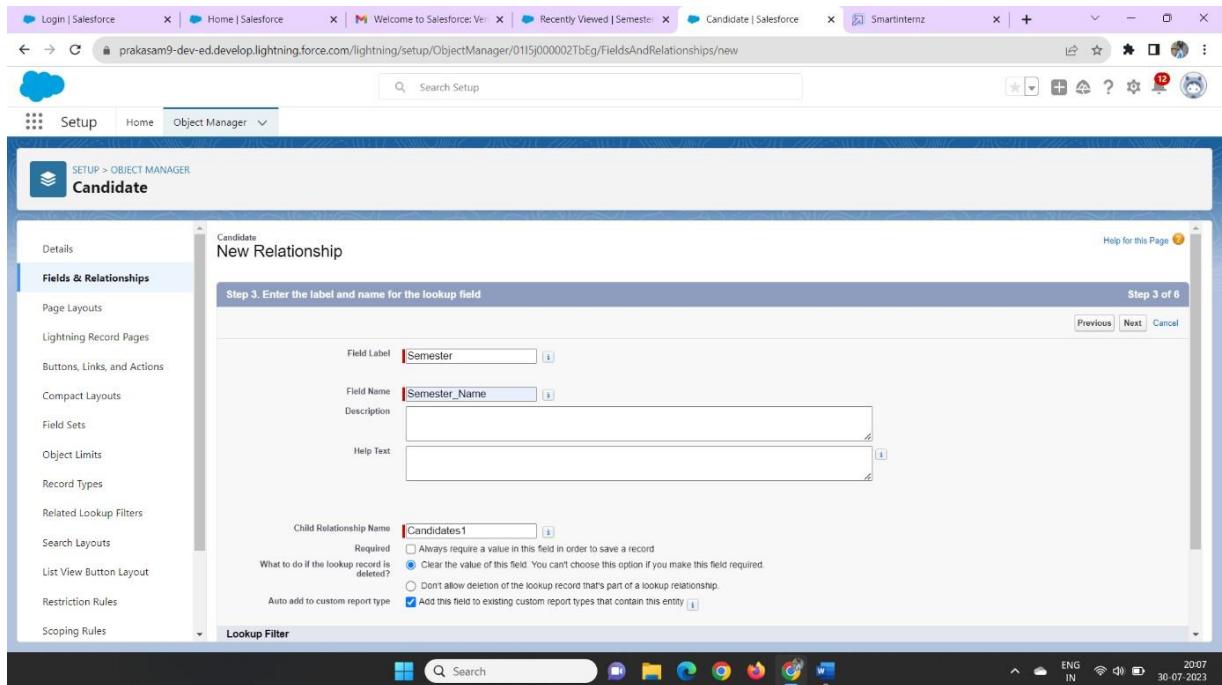
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Candidate	Candidate__c	Custom Object		25/07/2023	✓

At the bottom, the Windows taskbar shows various pinned icons like File Explorer, Edge, and Google Chrome. The system tray indicates ENG IN, battery level, and the date 30-07-2023.

In those We can new look up data type on the fields & relationship Later we can click on the Semester object to the related object



Then we can enter the next step we can add a field label name as Semester number and field name as Semester-name



Then click Next, Next, Save.

Then we can create the Candidate object, Course Detail Object, Internal Results Object and Lecturer Details object on the above manner

The screenshot shows the Salesforce Setup interface with the 'Course Detail' object selected. The 'Fields & Relationships' tab is active, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Detail Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Duration	Duration__c	Number(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Semester Name	Semester__Name__c	Lookup(Semester)		✓

In those we can create a Semester Fields on all the Candidate, Course Details, Lecturer Details & Internal Results

Step 7:

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

In This manner We can create a course data through the fields & relationship manner we can enter data type as number field

Later We can enter the field label a duration, enter

Then the help text was Enter Course duration value in Years

Then click Next, Next, Save

In those we can click on the object manager and search as Internal results as on the quick find

The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: Login | Salesforce, Home | Salesforce, Welcome to Salesforce: Ver..., Recently Viewed | Semester..., Object Manager | Salesforce, and Smartinternz. The current tab is 'Object Manager'. Below the tabs, there's a search bar labeled 'Search Setup' and a toolbar with various icons. The main content area is titled 'Object Manager' and shows a table with one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Internal result	Internal_result_c	Custom Object		28/07/2023	✓

At the bottom of the screen, you can see the Windows taskbar with various application icons and the system tray showing the date and time as 30-07-2023.

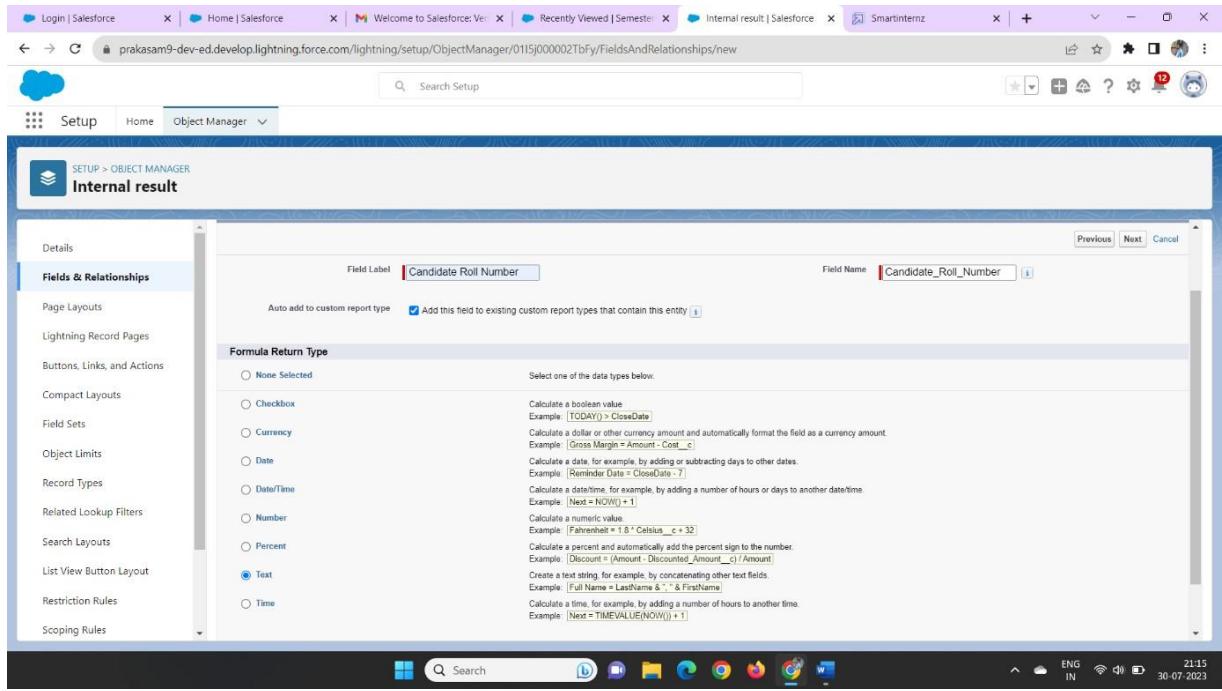
Then we can click on the field and relation and click new field enter formula as a data type

The screenshot shows the 'Internal result' field configuration page. The URL in the browser is prakasam9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002TbFy/FieldsAndRelationships/new. The page title is 'Internal result > OBJECT MANAGER'. On the left, there's a sidebar with options like 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, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Data Type' and contains the following options:

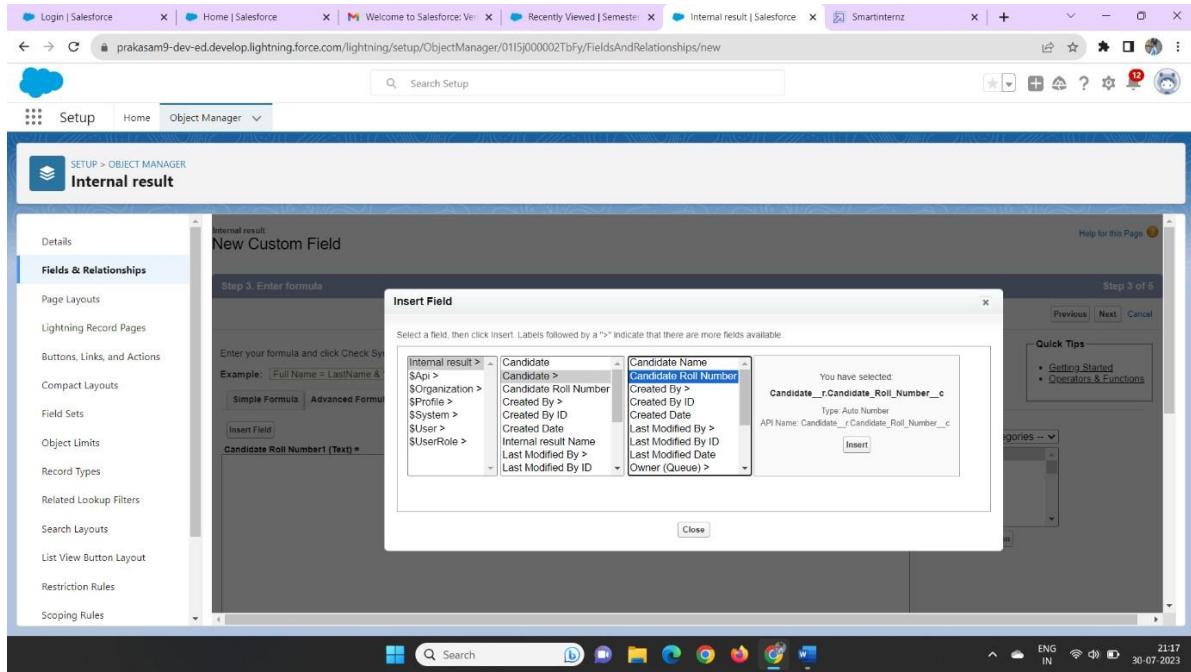
- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time

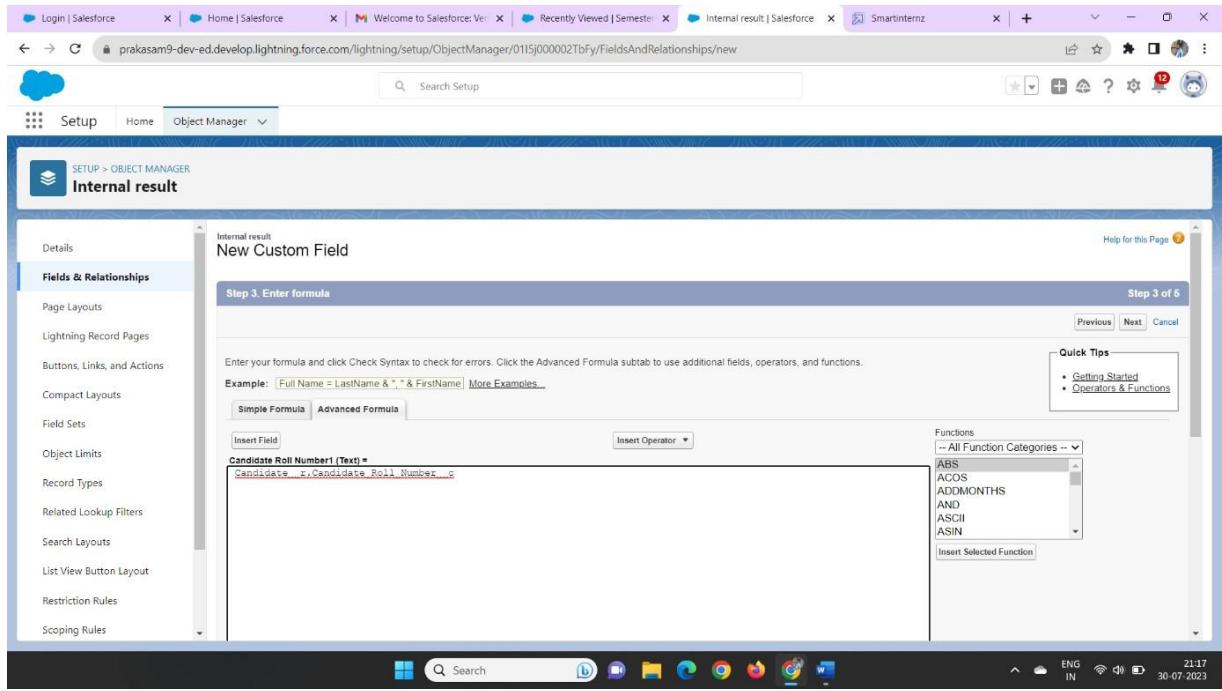
Each option has a brief description below it. At the bottom of the page, there's a note: 'Allow users to enter an email address which is confirmed to ensure ownership of this field is provided for a contact or lead user can choose the address when editing Contact'. The bottom of the screen shows the Windows taskbar and system tray.

Then we can enter the field name as candidate roll number and click text as a data type



Then we can enter on the insert field as the candidate roll number and click the check syntax





Then click on Next, Next, Save

Later we can create a data type on candidate object on the fields and relationship then we enter the data type as auto number

We can enter the candidate roll number as the auto number cr-{0000} as the auto number of the formula

Step 8:

Creating Users

In the users we can be create a user in those we can click on the home and click on the quick find box then enter user then click on the new user

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar shows navigation options like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main area is titled 'All Users' and lists several users. One user, 'nalluri_teja', is highlighted. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Profile' column shows 'Standard User' for most users, except for 'Chatter Free User' and 'Analytics Cloud Integration User'.

We can enter the first name last name and username

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

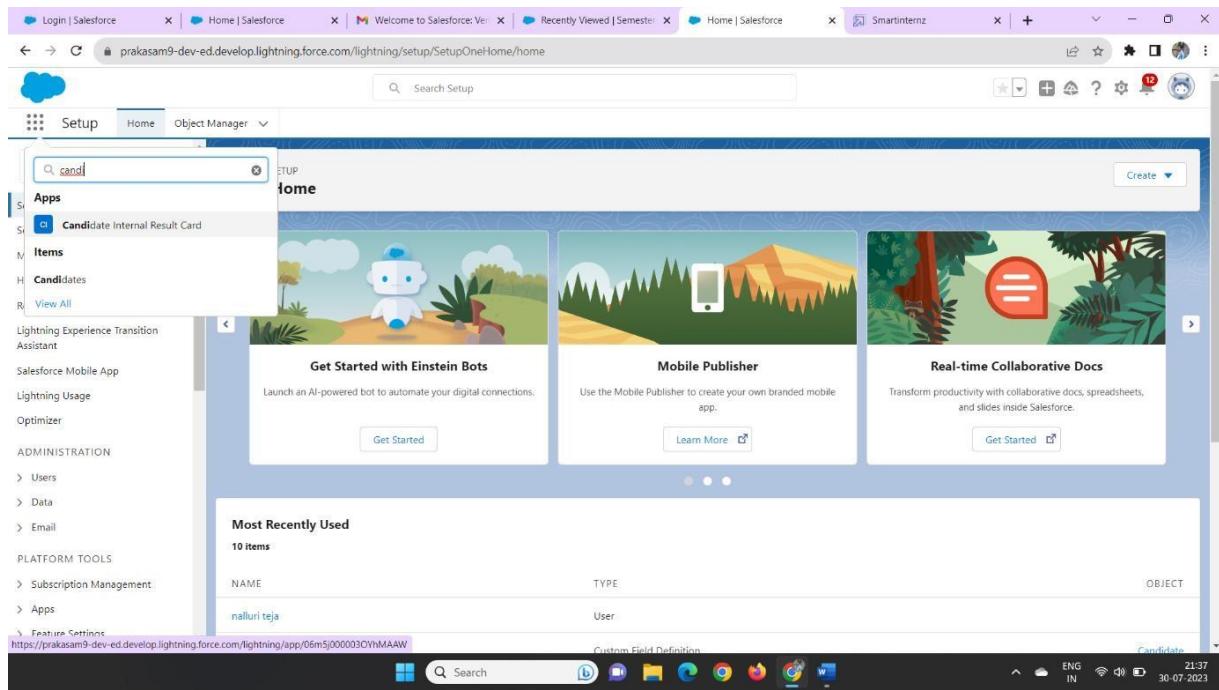
The screenshot shows the 'User Edit' page for the user 'nalluri_teja'. The 'General Information' section contains fields for First Name ('nalluri'), Last Name ('teja'), Alias ('nteja'), Email ('nalluriteja3012@gmail.com'), Username ('nalluriteja3012@gmail.com'), Nickname ('User160026977618621151'), Title, Company, Department, and Division. On the right side, there is a large list of checkboxes for various user profiles and licenses, with 'Standard User' checked. Other options like 'Marketing User', 'Offline User', and 'WDC User' are also listed.

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

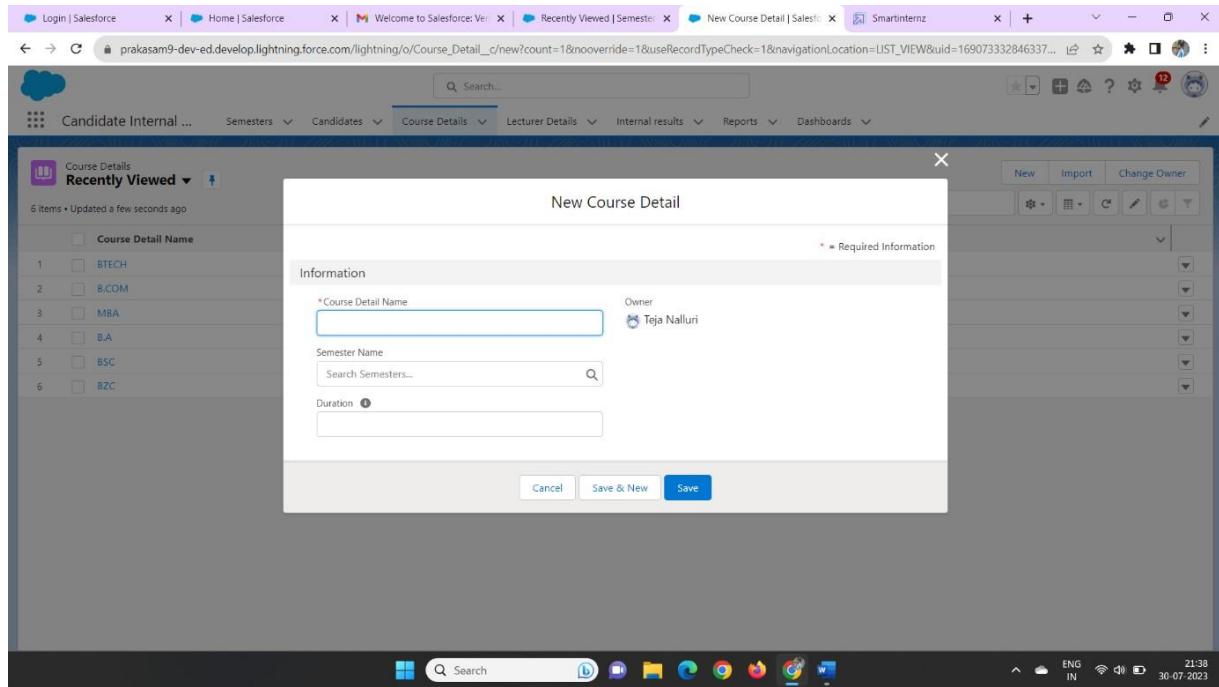
Step 9:

Create Records

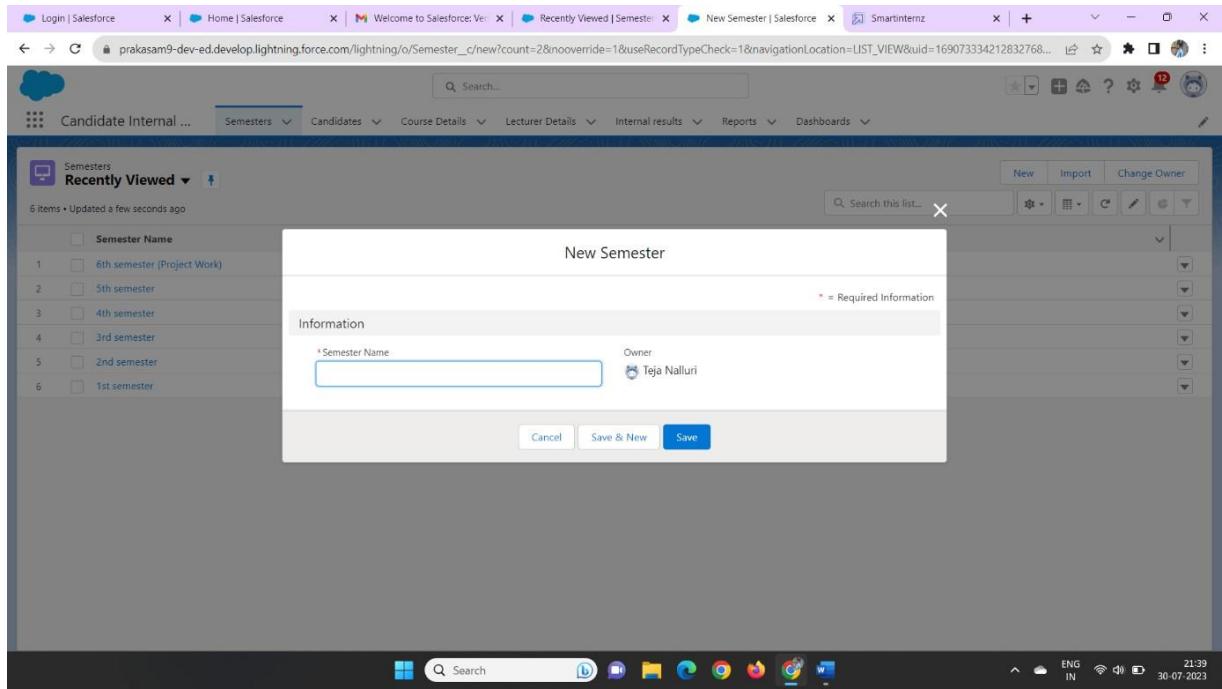
Now click on the app launcher on the left side of the screen



Click the candidate internal results card on the app launcher



Then we can enter the course details on the tab click new and enter the course details

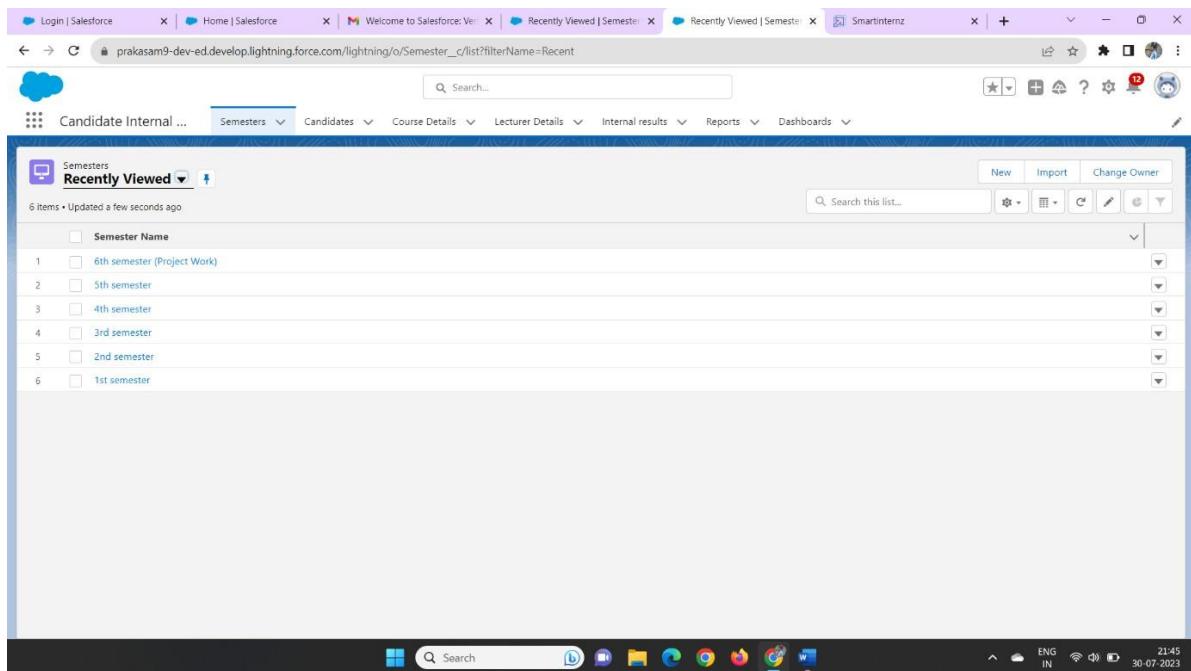


Click on the semester tab and create a semester on the tab

Step 10: View Records

click on the app launcher and search as candidate internal results card

Then we can view the created records on the semester field and course details field

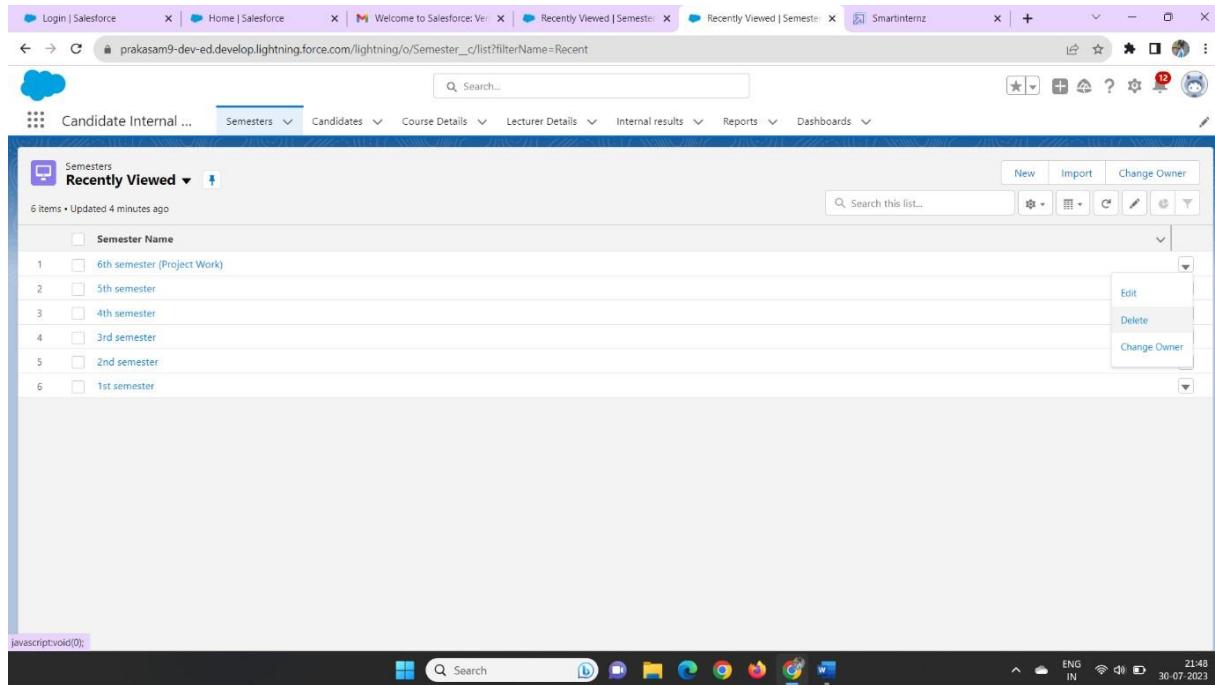


Step 11:

Delete Records

We can click on the app launcher and search as candidate internal results card

We can delete the fields on the created of the data



In those we can delete the records on the object

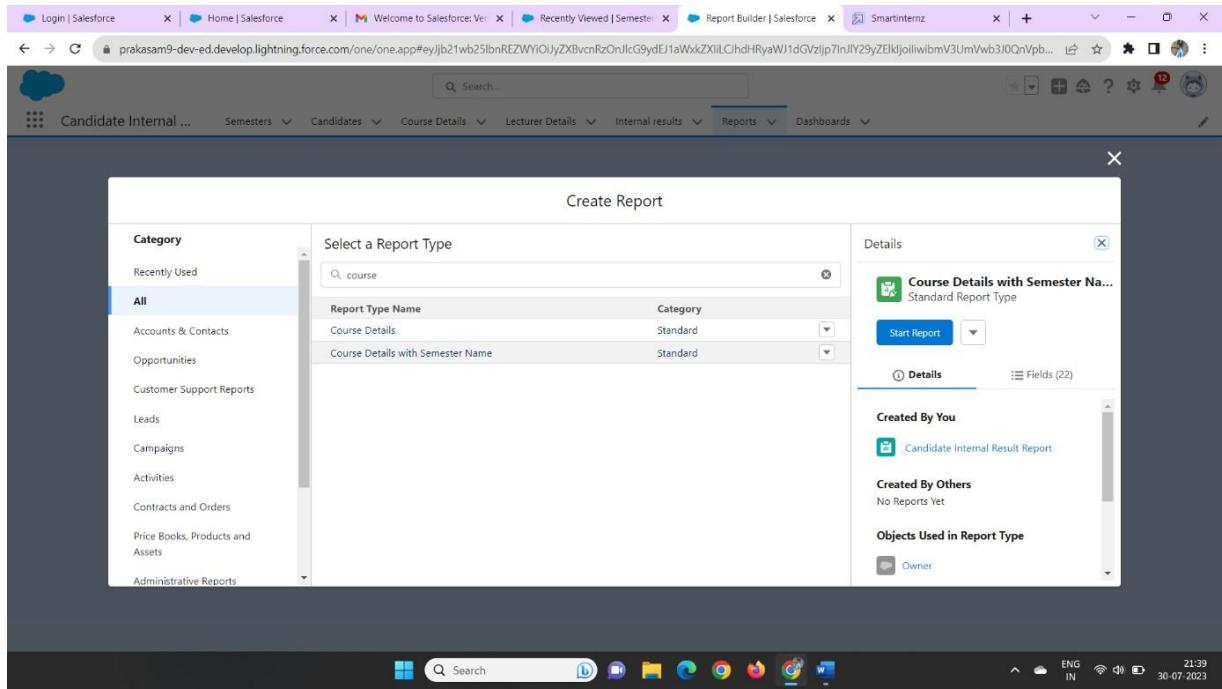
Step 12:

Create Report

We can click on the app launcher and search as candidate internal results card

Click on the reports tab and click on the new report and click on all And enter the course details with semester name

And click on start report



Then we can enter the data as group row as course details as course detail name in group row field

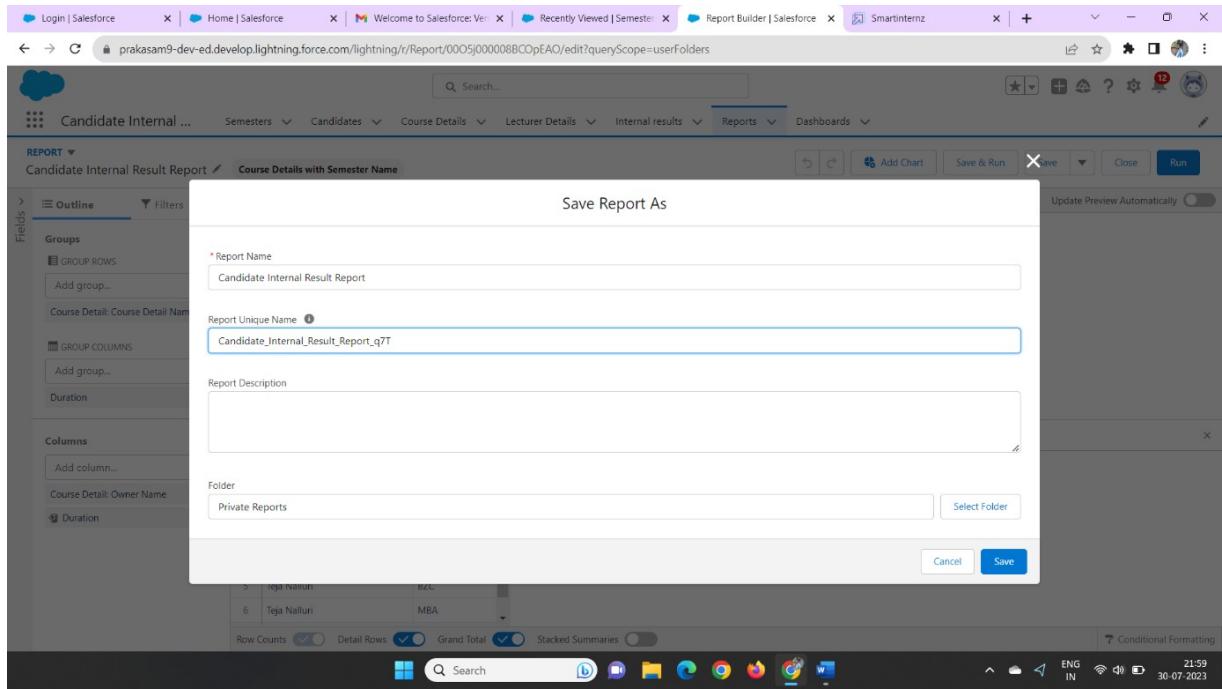
Group column as Duration on the data Column as course details as owner name And create a bucket column of the data

Duration	BA	B.COM	BSC	BTECH	BZC	MBA	Total
2	0	1	0	1	0	0	1
3	1	0	1	0	1	0	2
4	0	0	0	1	0	1	1
Total	1	1	1	1	1	1	6

Course Detail: Owner Name	Duration
Teja Nalluri	BA
Teja Nalluri	B.COM
Teja Nalluri	BSC
Teja Nalluri	BTECH
Teja Nalluri	BZC
Teja Nalluri	MBA

Then click and save and run

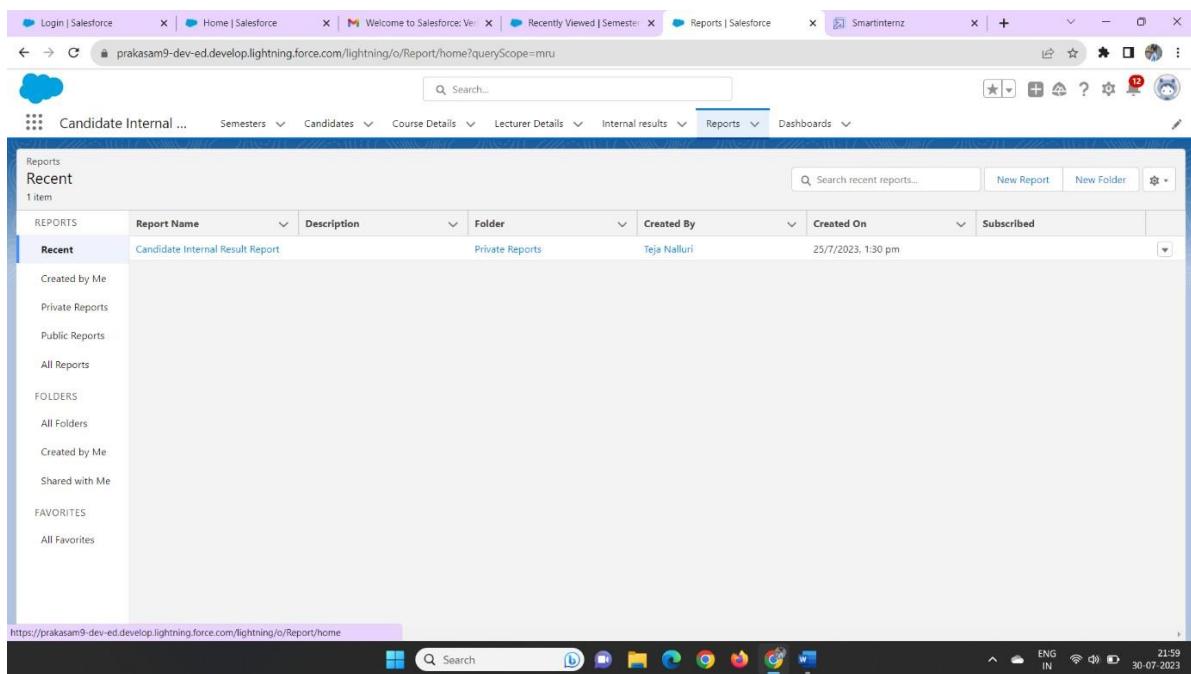
We can enter the Report name as Candidate internal results report as on the private folder



Step 13:

View reports

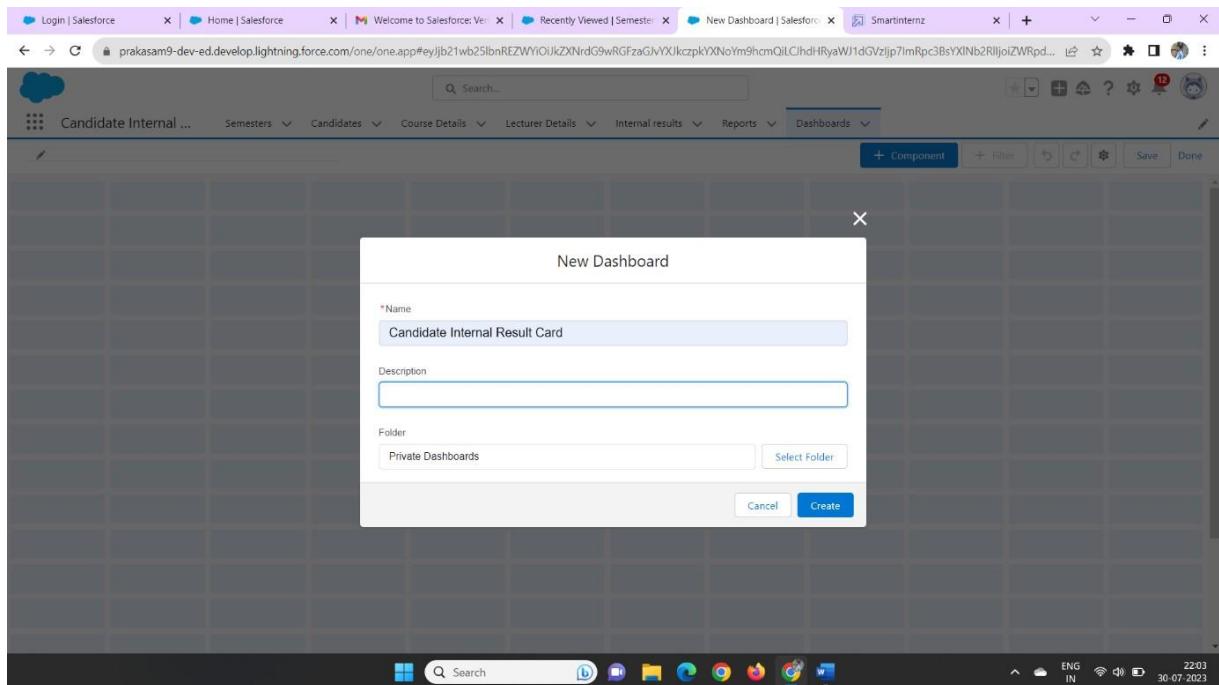
click on the app launcher and search as candidate internal results card click on the reports tab
we can check the reports tab



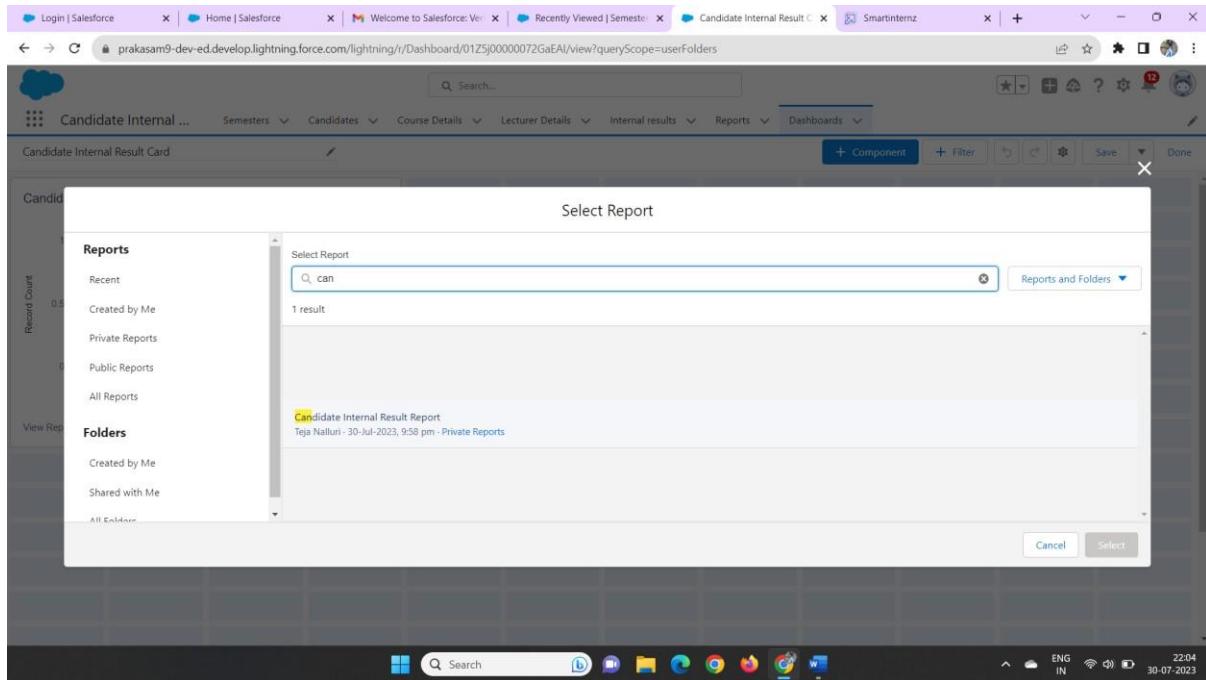
Step 14

Create Dashboard

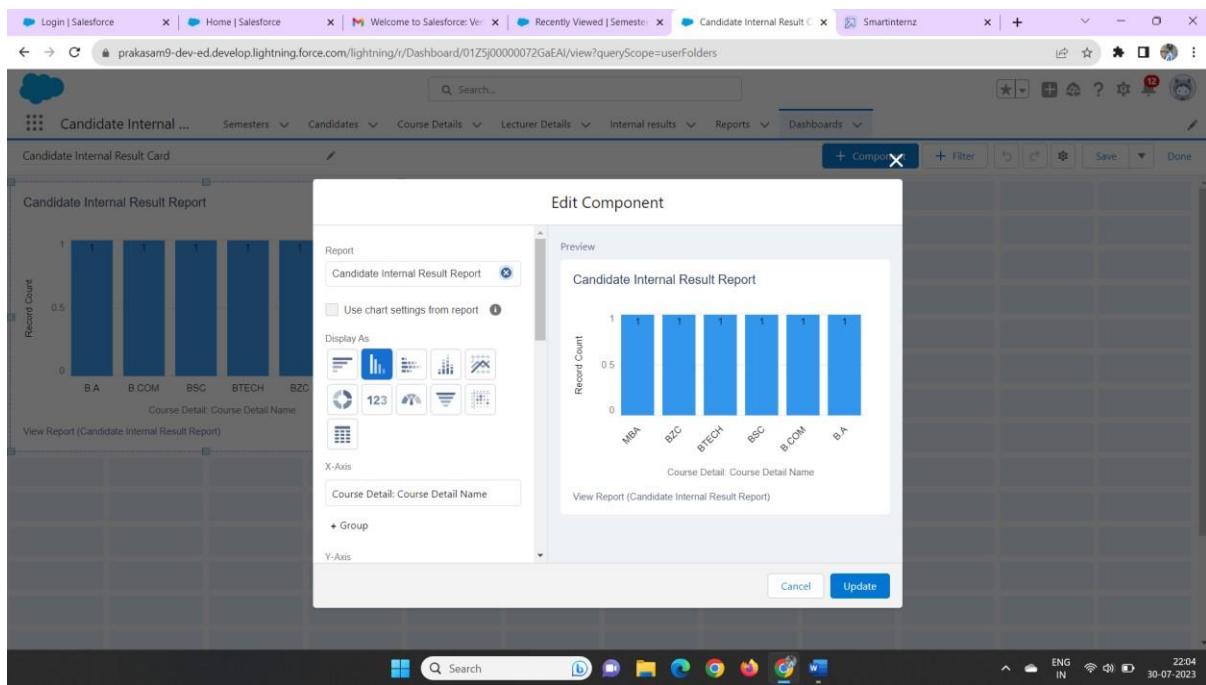
click on the app launcher and search as candidate internal results card we click on the dashboard and create a new dashboard with thw name of candidate internal result card



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



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



Then click on the finish it will be created

Step 15:

View Dashboards

click on the app launcher and search as candidate internal results card click on the dashboard tab and we can check the dashboards

The screenshot shows the Salesforce Dashboards page. At the top, there are several tabs: Login | Salesforce, Home | Salesforce, Welcome to Salesforce: Ver..., Recently Viewed | Semeste..., Dashboards | Salesforce, and Smartinternz. Below the tabs is a navigation bar with icons for Home, Candidate Internal..., Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. A search bar labeled 'Search...' is also present. The main content area is titled 'Dashboards' and 'Recent'. It shows a single item: 'Candidate Internal Result Card', which was created by 'Teja Nalluri' on '25/7/2023, 1:33 pm'. On the left side, there are filters for DASHBOARDS (Recent, Created by Me), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The bottom of the screen shows a Windows taskbar with various application icons and system status indicators.

Then we can click on that dashboard we can see the created dashboard

The screenshot shows the 'Candidate Internal Result Card' dashboard. At the top, there are tabs: Login | Salesforce, Home | Salesforce, Welcome to Salesforce: Ver..., Recently Viewed | Semeste..., Candidate Internal Result Card, Smartinternz, and a new tab for Candidate Internal Result Card. Below the tabs is a navigation bar with icons for Home, Candidate Internal..., Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. A search bar labeled 'Search...' is also present. The main content area is titled 'Candidate Internal Result Report'. It displays a bar chart titled 'Record Count' with a value of 1 for each course category: BA, B.COM, BSC, BTECH, BZC, and MBA. Below the chart, it says 'Course Detail: Course Detail Name'. There is a link 'View Report (Candidate Internal Result Report)'. The bottom of the screen shows a Windows taskbar with various application icons and system status indicators.