Implementing CRM For Result Tracking Of Candidate

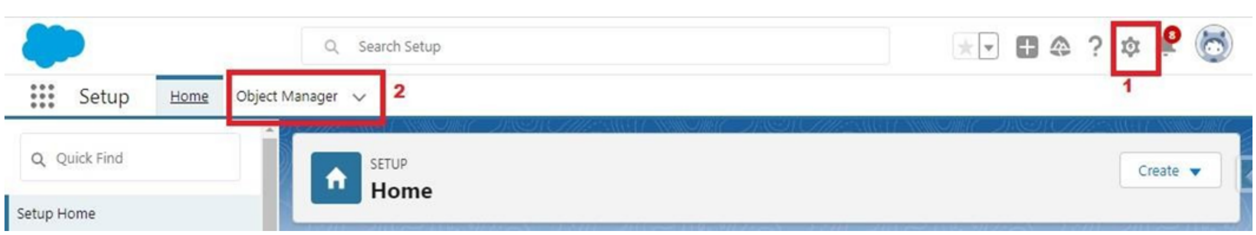
With Internal Marks

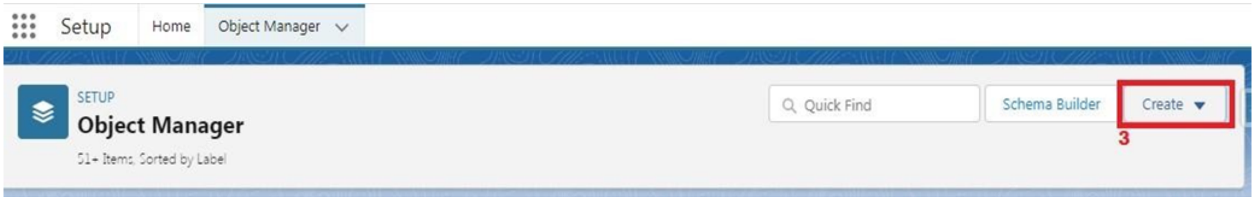
The administrator should be able to create all base data including Semester, Candidate, Course and Lecturer ,Lecturer should have the ability to create Internal Results, Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results, Re-evaluation Can be initialized by Candidate for all Internal Results. Now only dean can update the marks after re- evaluation.

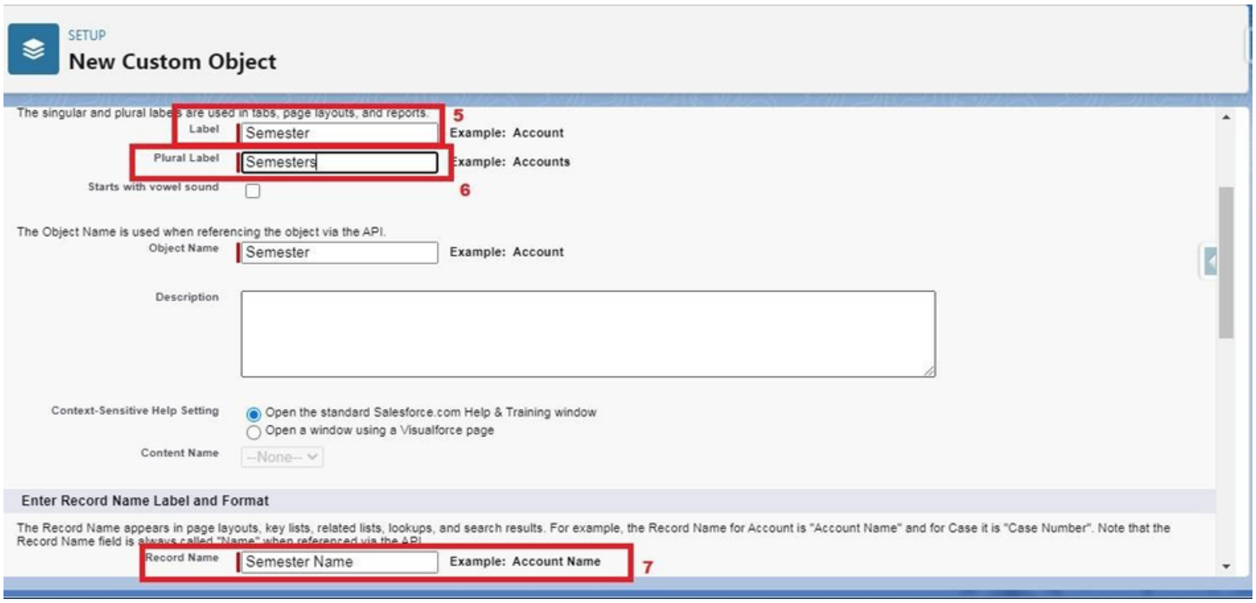
Creation Of Semester Object For Candidate Internal Result Card

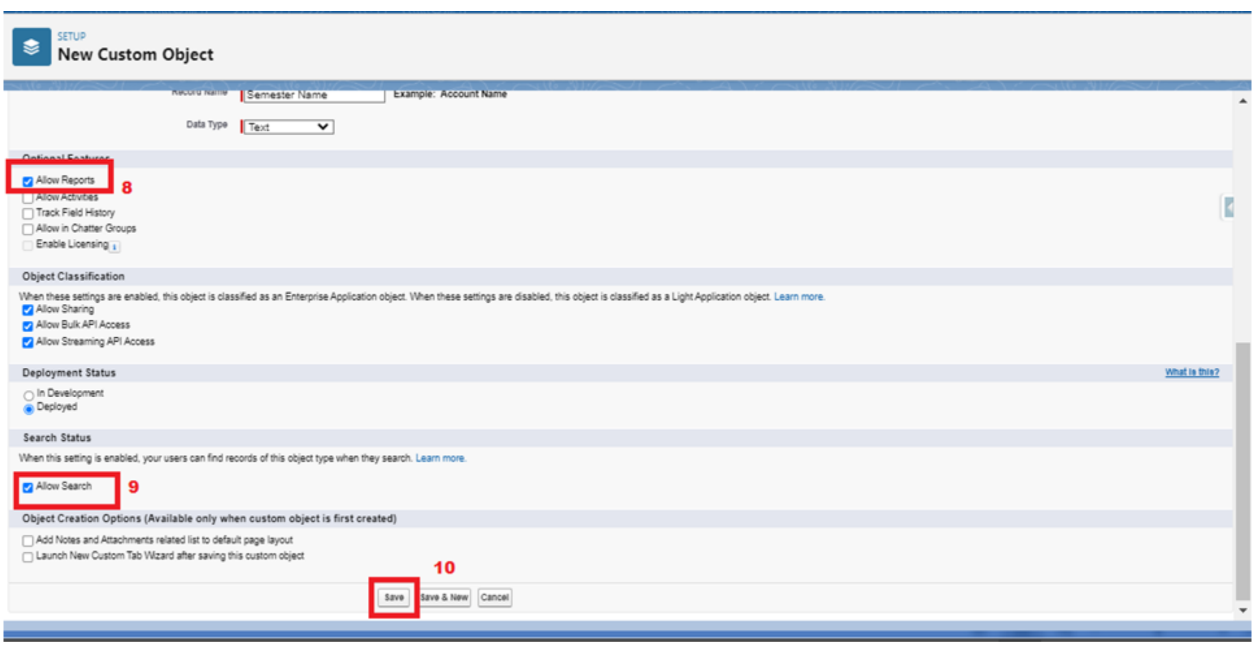
1. Click on the gear icon and then select Setup.
2.Click on the object manager tab just beside the home tab.
3.After the above steps, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.
4.On the Custom Object Definition page, create the object as follows:
5.Label: **Semester**
6.Plural Label: **Semesters**
7.Record Name: **Semester Name**
8.Check the **Allow Reports**
9.Check the **Allow Search**
10.Click Save.

In the same way create **4** more objects as **Candidate, Course Details, Lecturer Details** and **Internal results.**





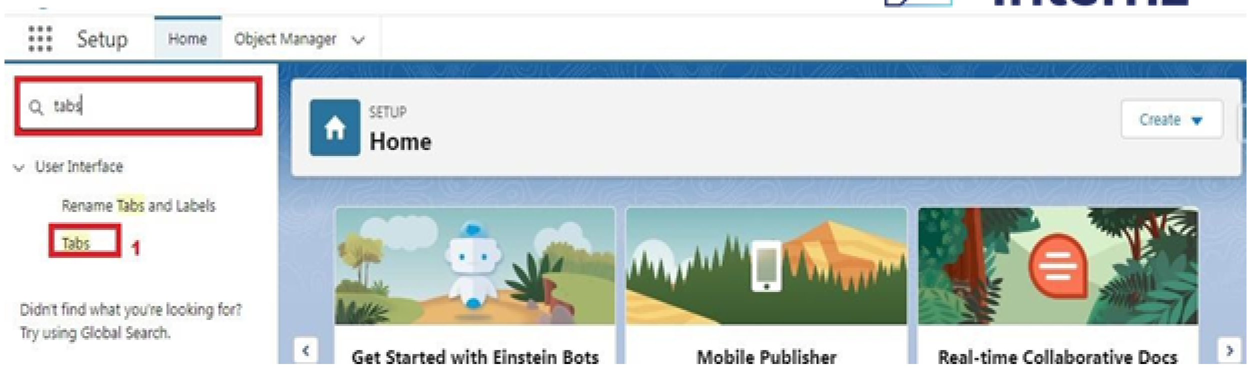




Creation Of Semester Tab

Now create a custom tab. Click the Home tab.

1.Enter Tabs in Quick Find and select Tabs.
2.Under Custom Object Tabs, click New.
3.For Object, select **Semester**.
4.For Tab Style, select any icon.
5.Leave all defaults as is. Click Next, Next, and Save
6.In the same way create Tabs for all Custom Objects -Candidate, Course Details, Lecturer Details, Internal results.

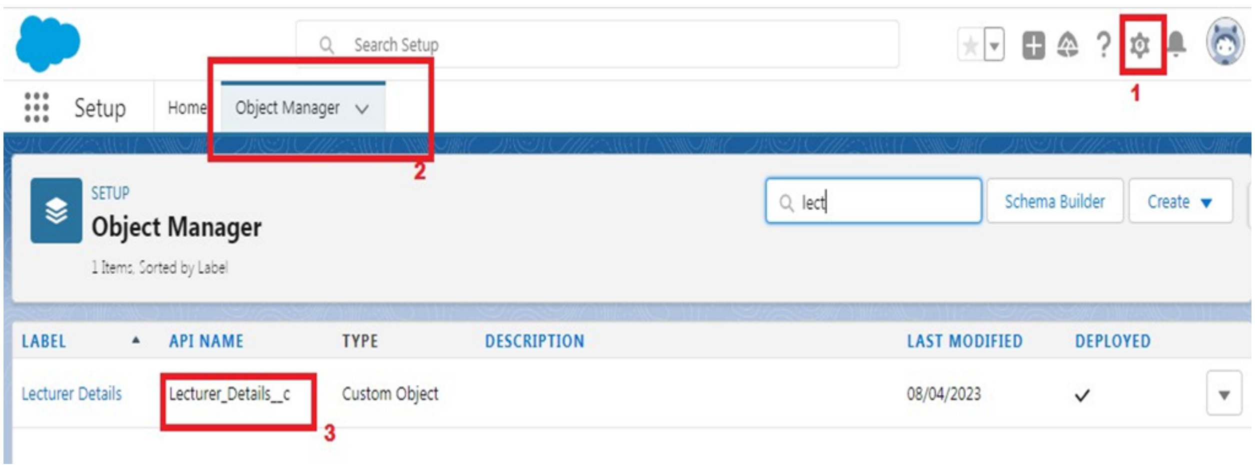


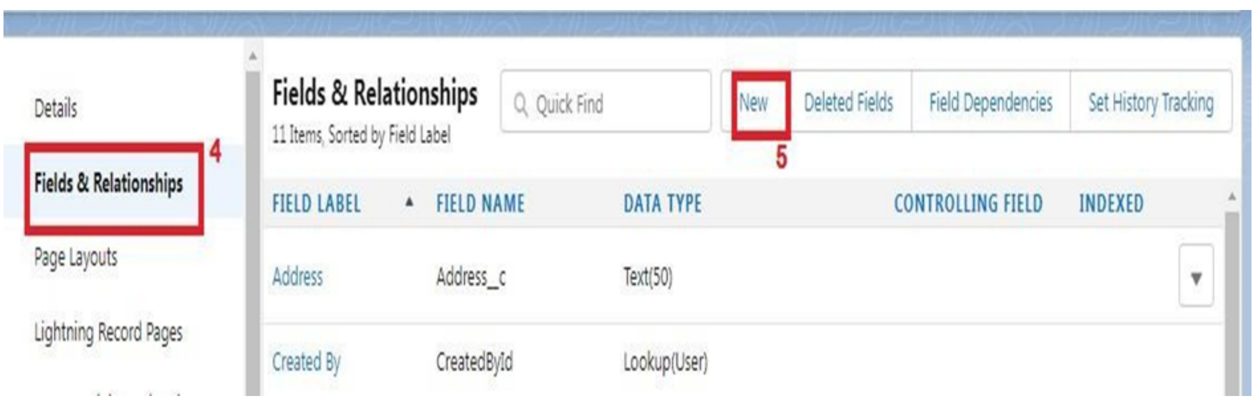
Create The Candidate Internal Result Card

1.From Setup, enter App Manager in the Quick Find and select App Manager.
2.Click New Lightning App.
3.Enter **Candidate Internal Result Card** as the App Name, then click next
4.Under App Options, leave the default selections and click next.
5.Under Utility Items, leave as is and click Next.
6.From Available Items, select **Semester, Candidate, Course Details, Lecturer Details, Internalresults, Reports, and Dashboards** and move them to Selected Items.
7.Click Next.
From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

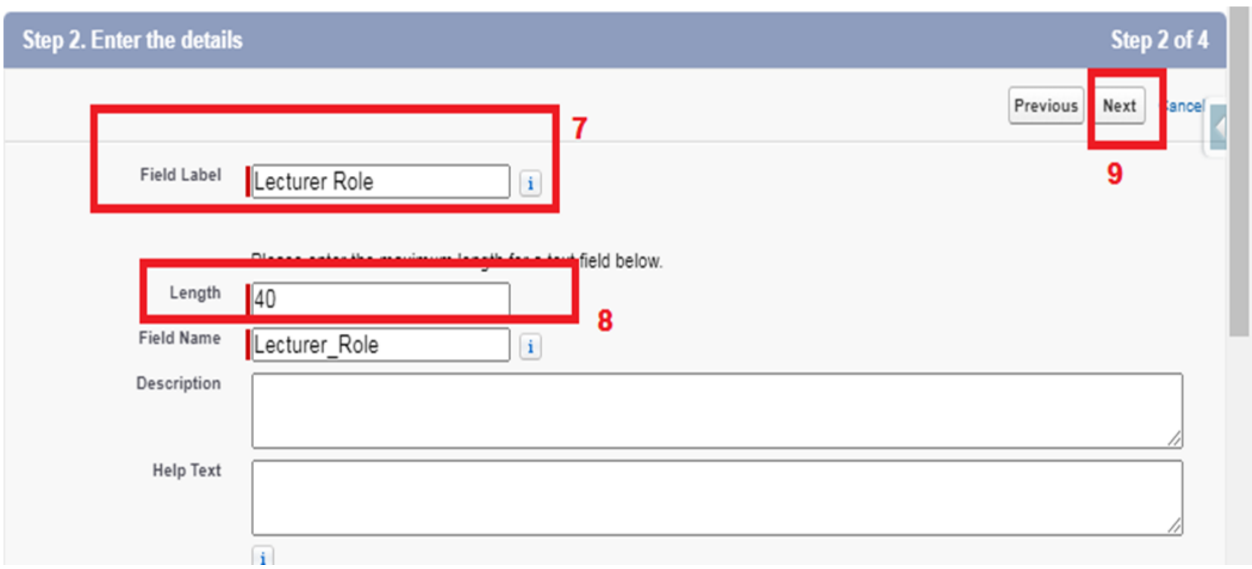
Creation Of Text Field For The “Lecturer Details” Object

1.Click the gear icon and select Setup. This launches Setup in a new tab.
2.Click the Object Manager tab next to Home.
3.Select **Lecturer Details**
4.Select Fields & Relationships from the left navigation
5.Click New
6.Select the **Text** as the Data Type, click next.
7.For Field Label, enter **Lecturer Role**
8.Enter Length 40
9.Click Next, Next, then Save & New.



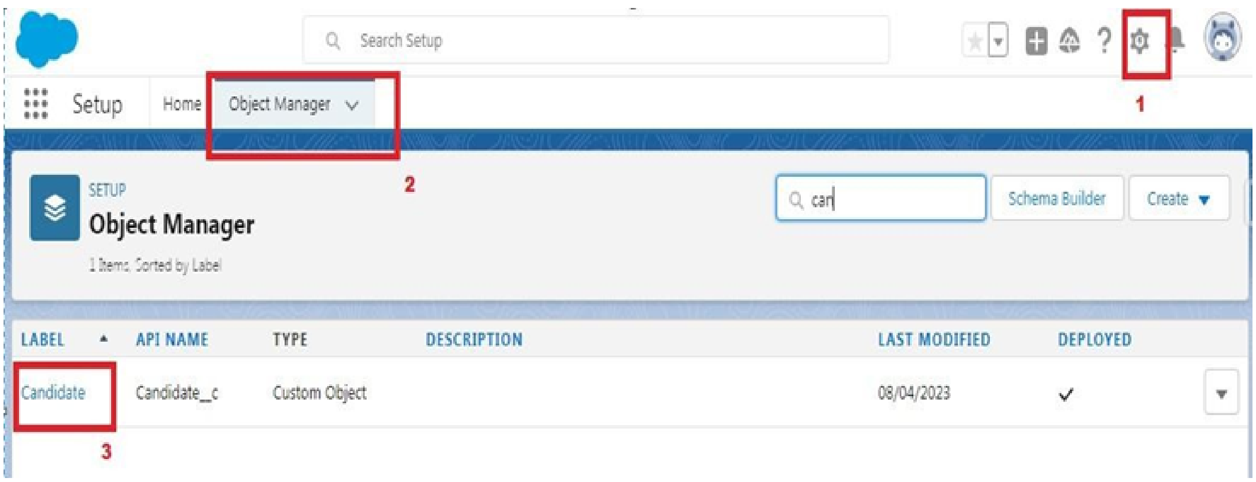


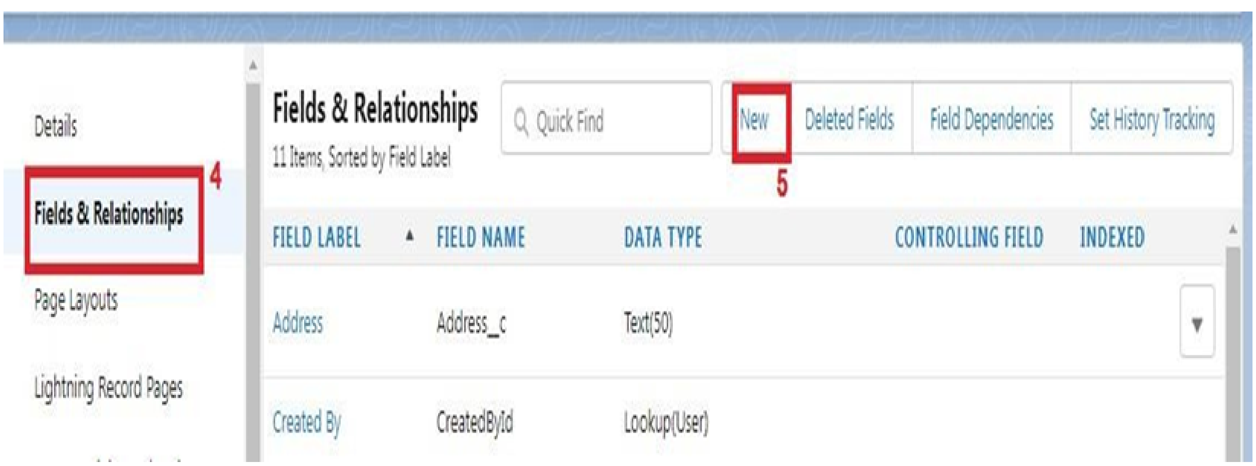

Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
6
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

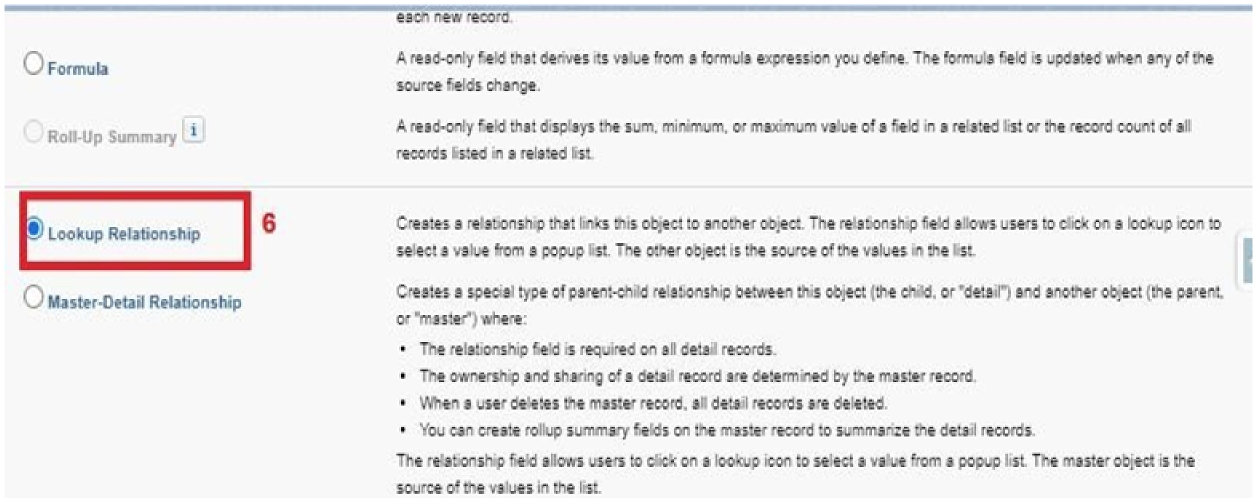

Step 2. Enter the details
Step 2 of 4
Previous
Next
7
9
Field Label
Lecturer Role
field below.
Length
40
8
Field Name
Lecturer_Role
Description
Help Text

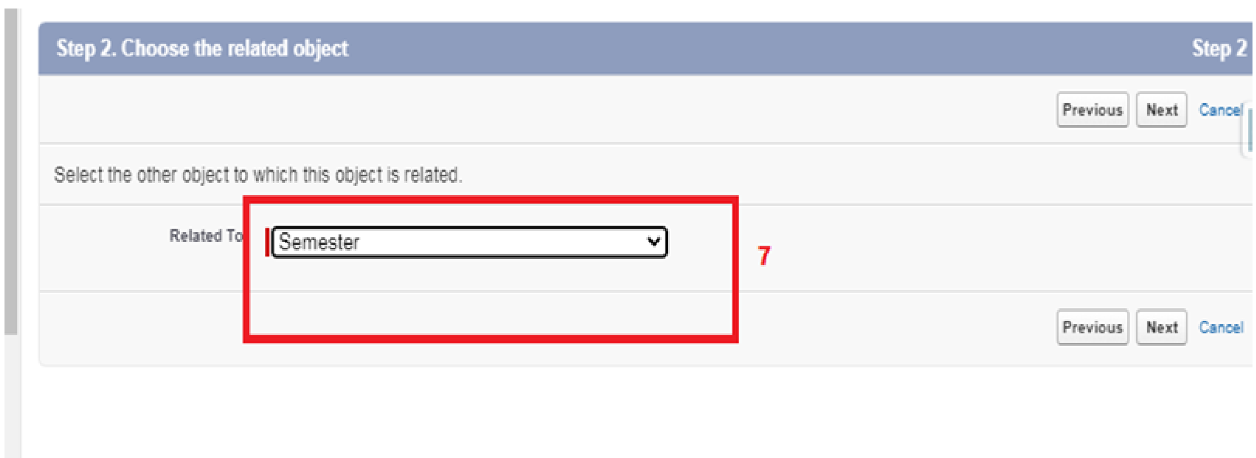
Create A Lookup Field On Candidate Object

1.Click the gear icon and select Setup. This launches Setup in a new tab.
2.Click the Object Manager tab next to Home.
3.Select **candidate**.
4.Select Fields & Relationships from the left navigation
5.Click New
6.Select the lookup as the Data Type, then click Next.
7.In related select **Semester**
8.For Field Label **Semester Name**, enter.
9.Click Next, Next, then Save & New.





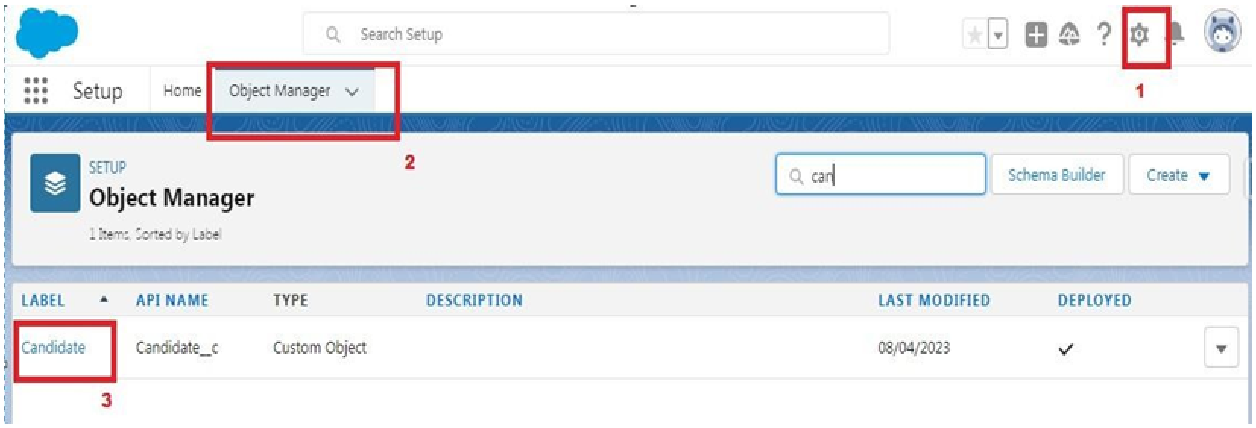


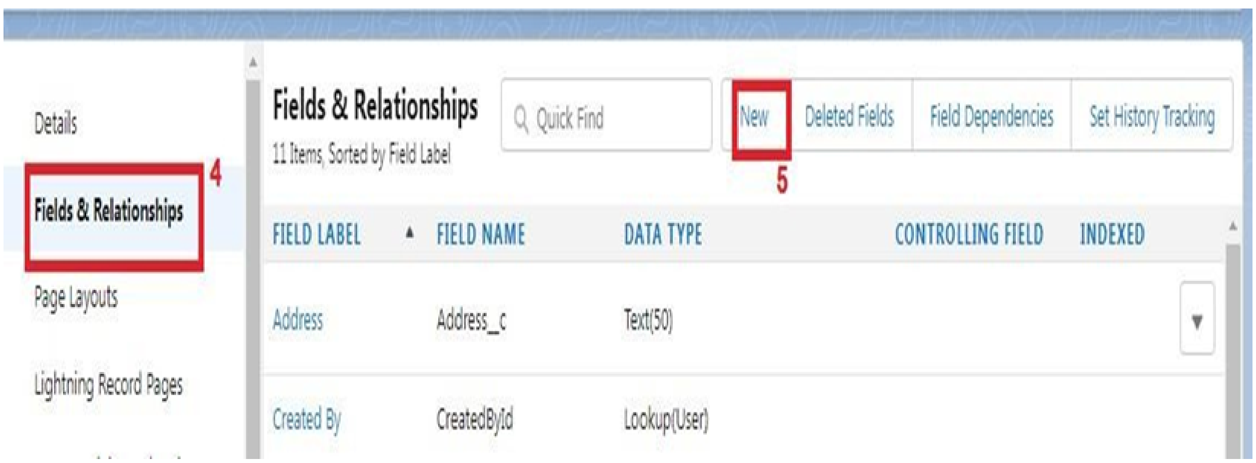


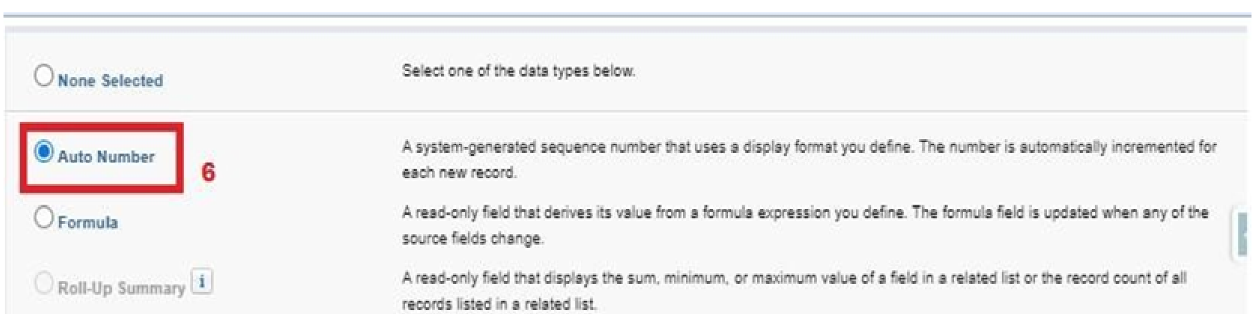
Create An Auto Number Field On Candidate Object

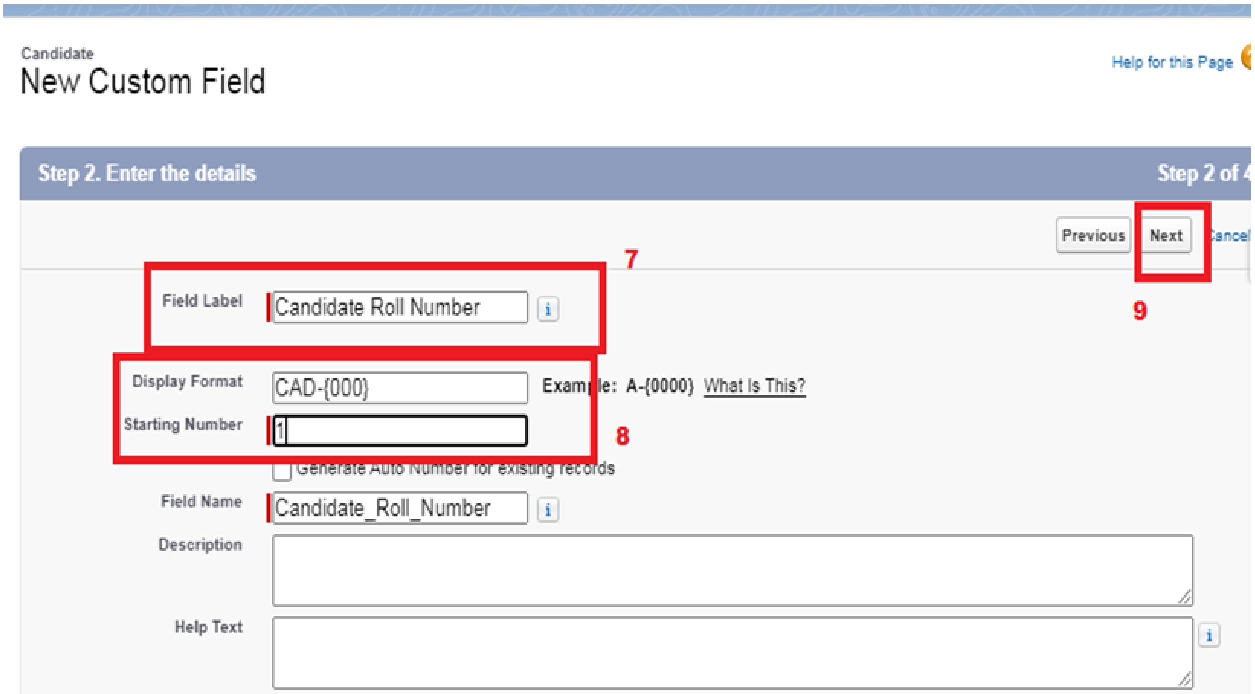
1.Click the gear icon and select Setup. This launches Setup in a new tab.
2.Click the Object Manager tab next to Home.
3.Select **Candidate.**
4.Select Fields & Relationships from the left navigation

5.Click New
6.Select the lookup as the Data Type, then click Next.
7.In related select Semester
8.For Field Label Semester Name, enter.
9.Click Next, Next, then Save & New.



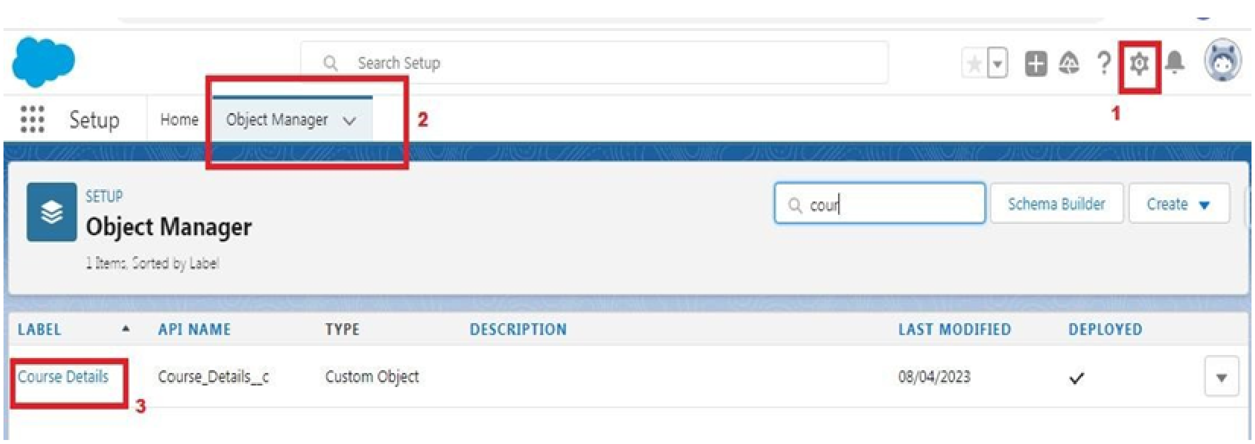


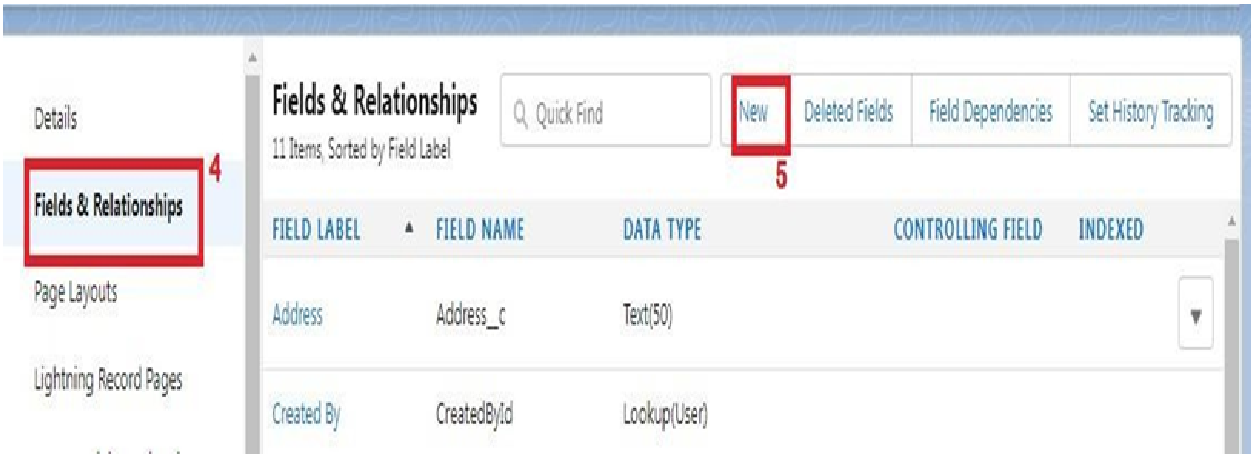


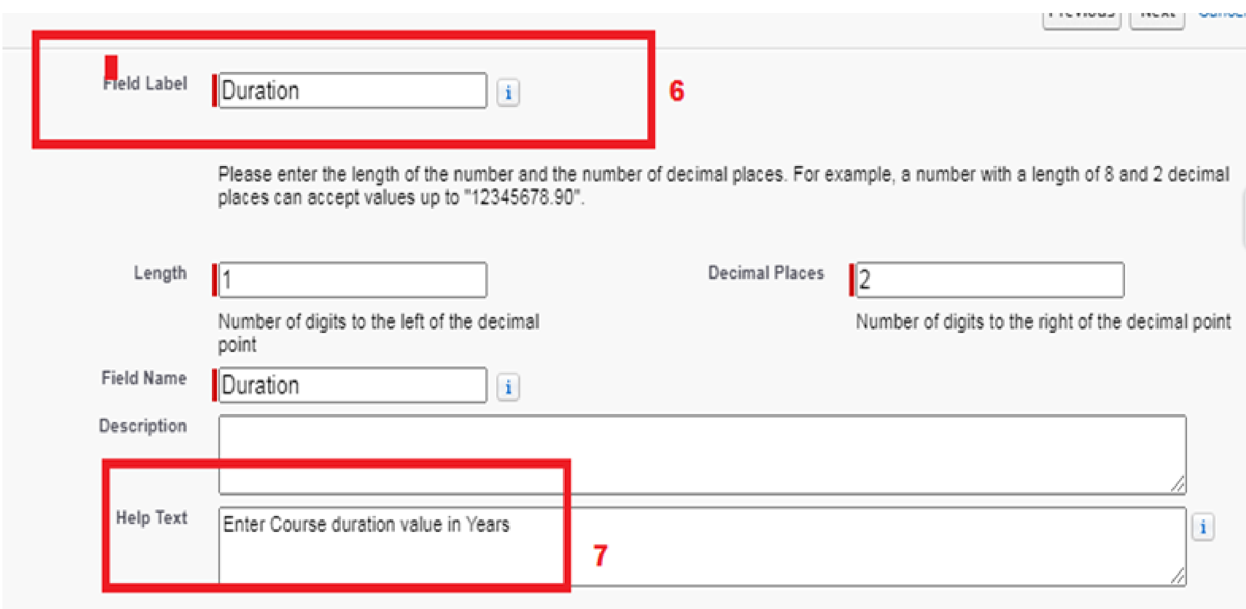


Create A Number Field On Course Detail Object

1.Click the gear icon and select Setup. This launches Setup in a new tab.
2.Click the Object Manager tab next to Home.
3.Select Course Detail.
4.Select Fields & Relationships from the left navigation
5.Click New & select number field, click Next
6.For Field Label Duration, enter.
7.**Give Help Text- Enter Course duration value in Years**
8.Click Next, Next, then Save & New.

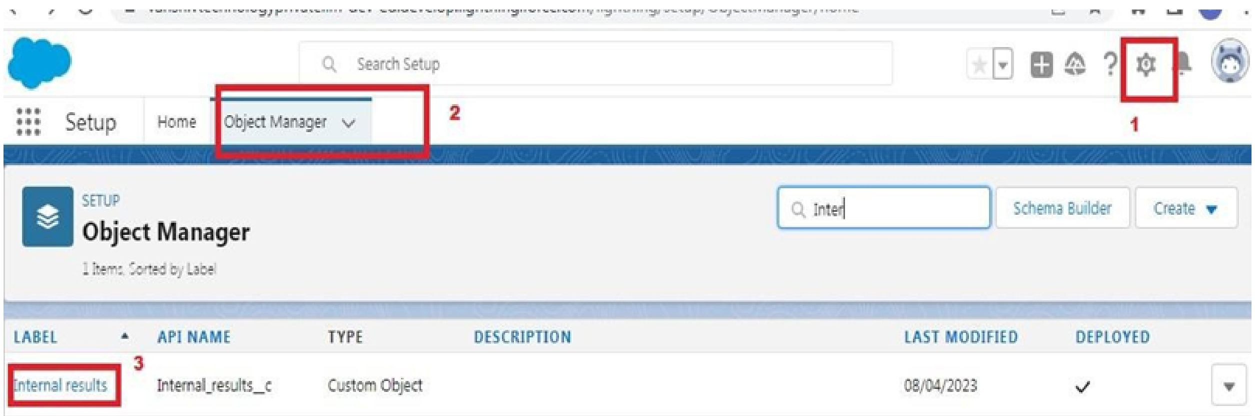


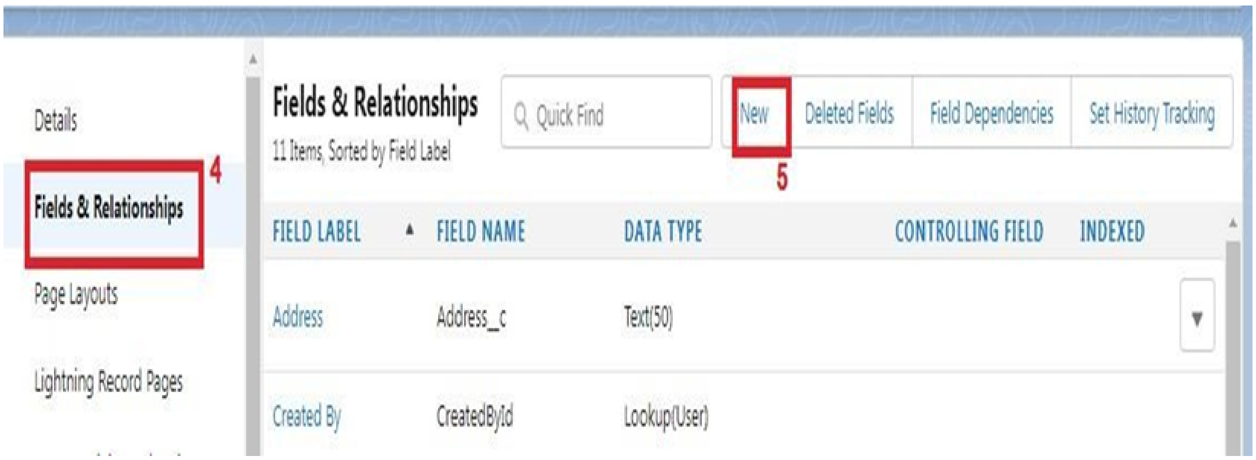


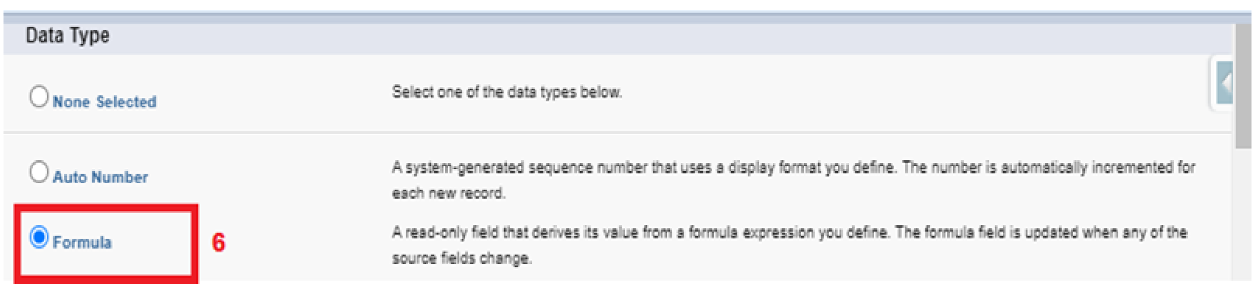


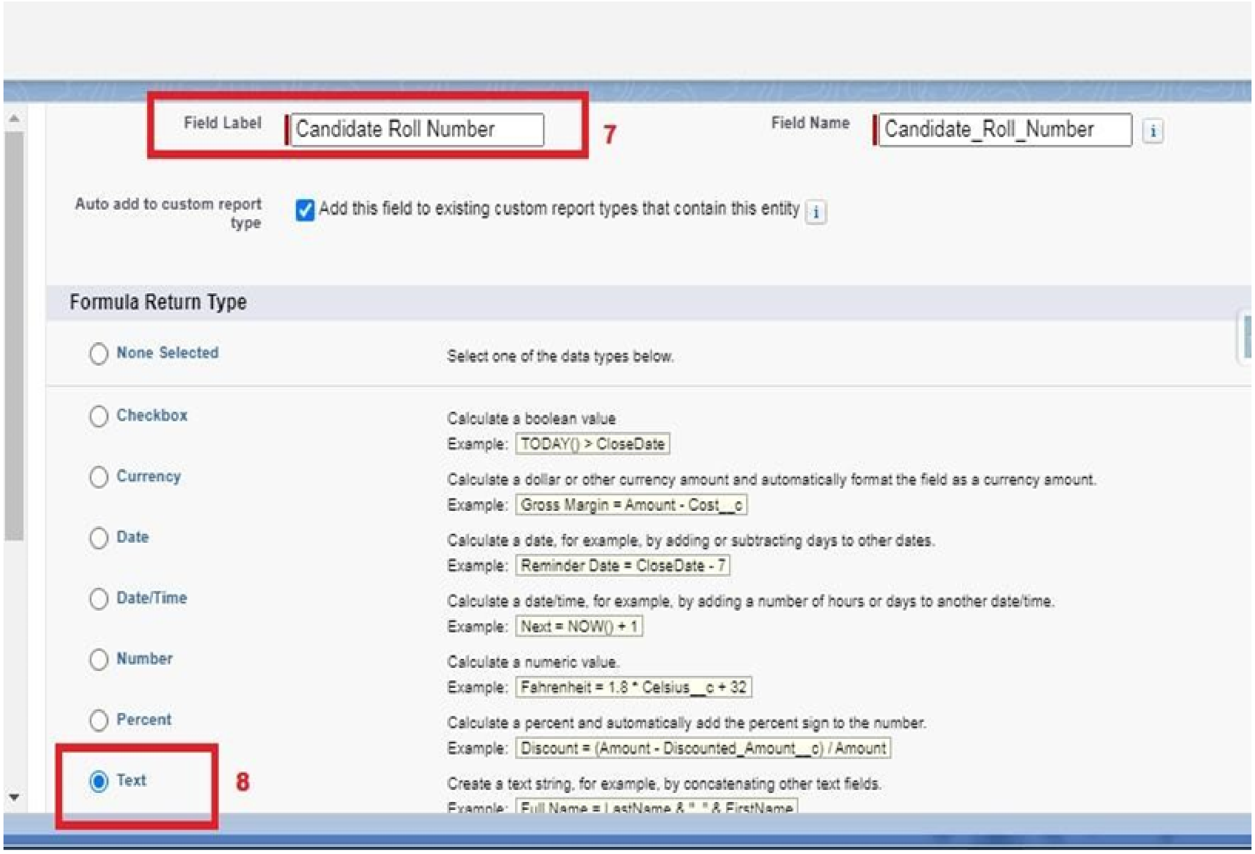
Create A Formula Field On Internal Results Object

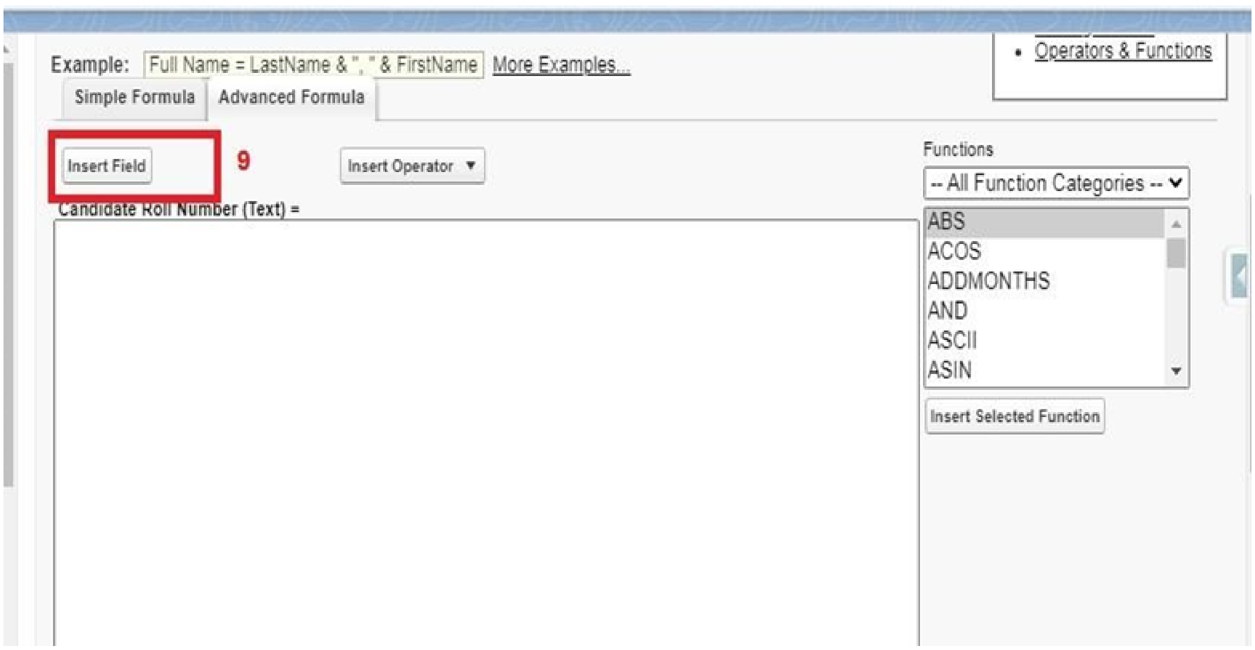
1.Click the gear icon and select Setup. This launches Setup in a new tab. 2.Click the Object Manager tab next to Home. 3.Select Internal results. 4.Select Fields & Relationships from the left navigation. 5.Click New 6.Select the Formula as the Data Type, then click Next. 7.Give field label Candidate Roll Number 8.Select formula return type text, Click Next 9.Click Insert Field 10.Create and insert formula Candidate r.Candidate_Roll_Number c, and then click Insert. 11.Click Next, Next, then Save.


Search Setup
Setup
Home
Object Manager
1
2
SETUP
Object Manager
1 Items, Sorted by Label
Inter
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
3
Internal results
Internal_results__c
Custom Object
08/04/2023


Details
Fields & Relationships
4
Page Layouts
Lightning Record Pages
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
5
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address__c
Text(50)
Created By
CreatedById
Lookup(User)


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.
Formula
6
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

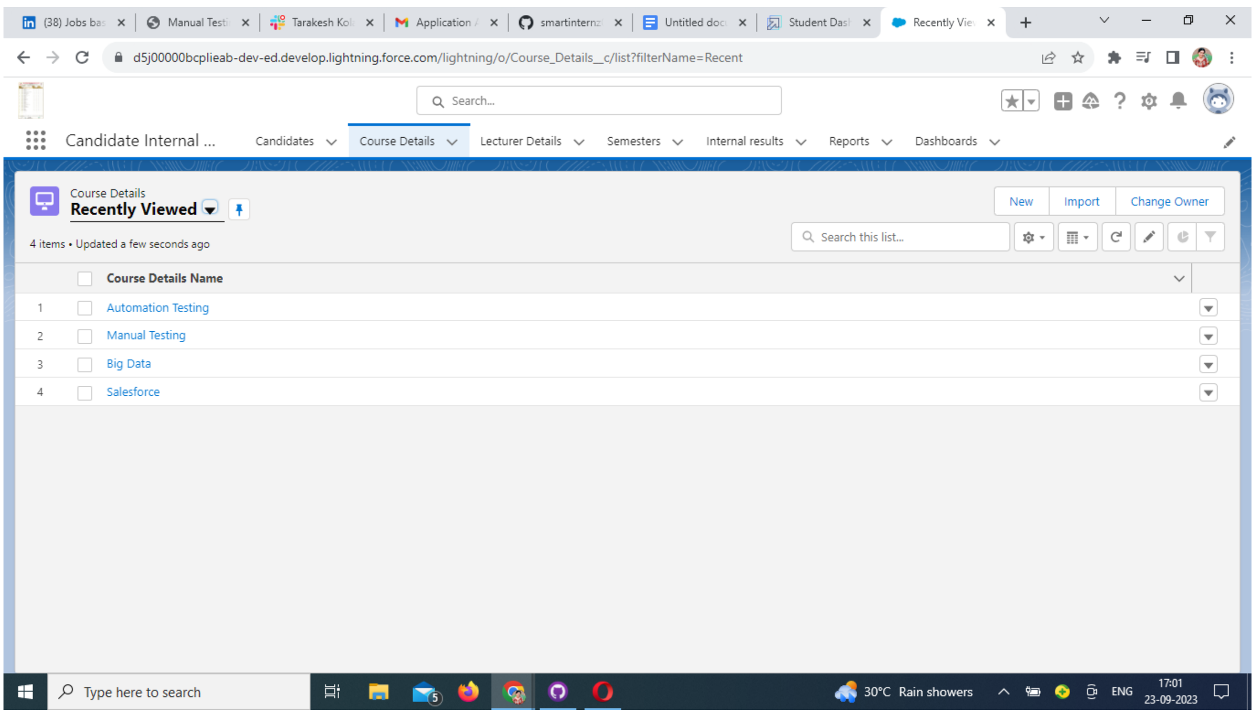

Field Label
Candidate Roll Number
7
Field Name
Candidate_Roll_Number
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
8
Create a text string, for example, by concatenating other text fields.


Example: Full Name = LastName & ", " & FirstName More Examples...
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
9
Insert Operator
Candidate Roll Number (Text) =
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function

Creating A User

1.From Setup, in the Quick Find box, enter Users.
2.Select Users.
3.Click New User.
4.Enter the First Name, **Class**, Last Name, **Teacher** and (Your) email address anda unique username in the form of an email address. By default, the username is the same as the email address.
5.Select a User License as salesforce.

NOTE- As **Salesforce** license can only be used by 2 Users at a time in Dev Org, so If you don't find **salesforce** license then deactivate a user who has salesforce license
Or change the license type from Salesforce to any other.
6.Select a profile as Standard user.
7.Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



View Record (Course Details)

1.Click on App Launcher on left side of screen.

2.Search **Candidate Internal Result Card** & click on it.
3.Click **on Course details** Tab.

Delete Record (Course Details):

1.Click on App Launcher on left side of screen.

2.Search **Candidate Internal Result Card** & click on it.

3.Click **on Course details** Tab.

4.Click on Arrow at right hand side on that Particular record.

5.Click delete and delete again.

Create Report

1.Click App Launcher
2.Select Candidate Internal Result Card App
3.Click reports tab
4.Click New Report.
5.Click the report type as Semesters with Course Click Start report.
6.Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a Matrix Report).
7.Click refresh
8.Click save and run
9.Give report name – Candidate Internal Result Report
10.Click Save

Create Dashboard

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

View Dashboard

1.Click on App Launcher on left side of screen.
2.Search Candidate Internal Result Card & click on it.
3.Click on Dashboard Tab.
4.Click on Candidate Internal Result Card see graph view of records

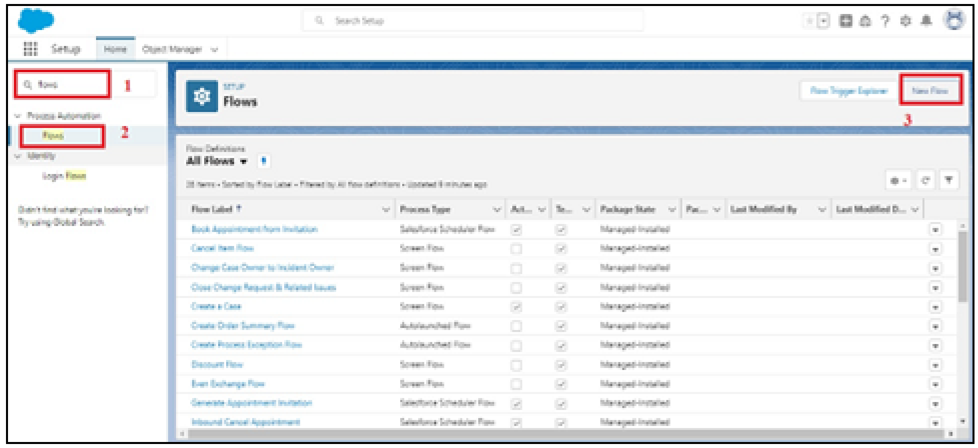
Screen Flow

In Salesforce, flows are visual representations of business processes that can be created and managed using the Salesforce Flow Builder. Flows are designed to automate and streamline complex business processes, such as collecting data, updating records, and integrating with external systems, without writing any code.

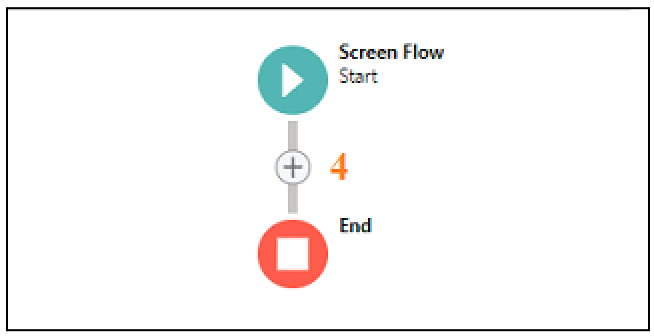
Screen Flows: Screen flows are flows that are designed to guide users through a series of screens to collect data or present information. They are typically used to create user-friendly data entry forms or wizards, and can include input fields, picklists, and other user interface components.

Create A Screen Flow

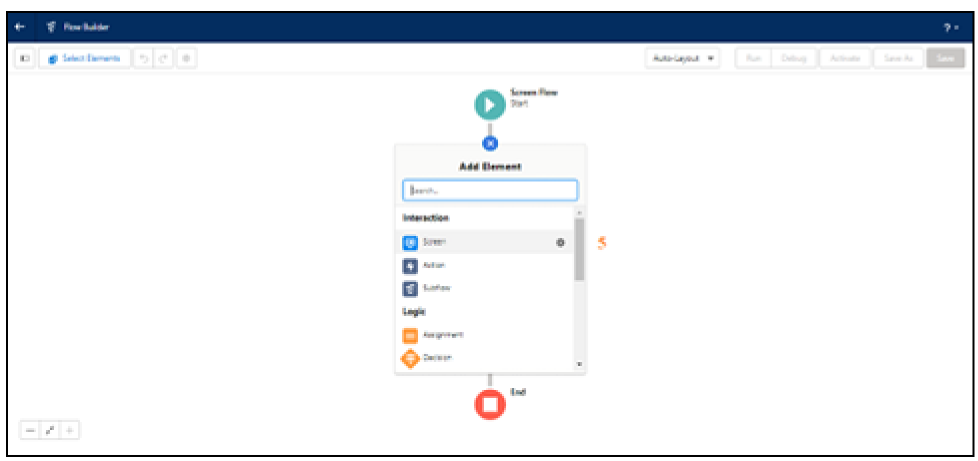
1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow



4. It will open the canvas. Select (+)



5. Select the screen element from the drop down.

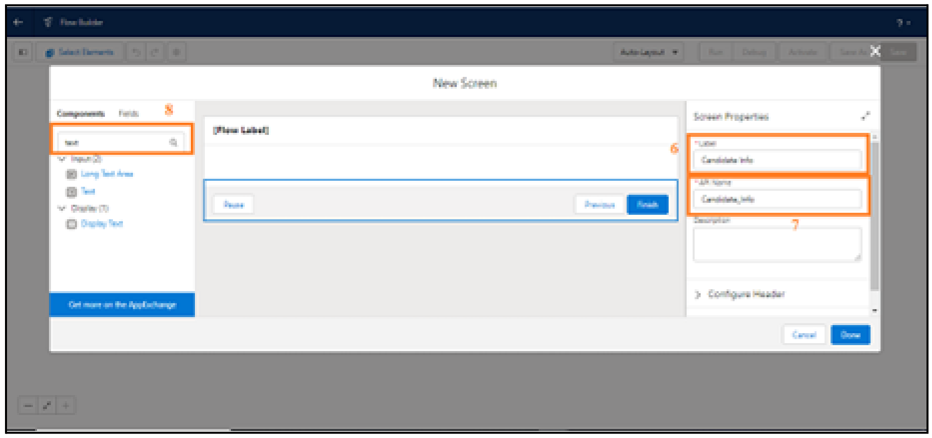


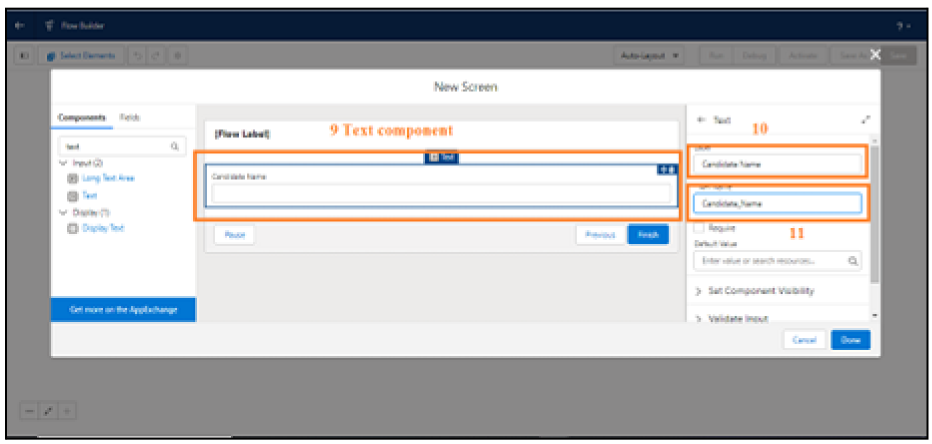
6. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label:Candidate info

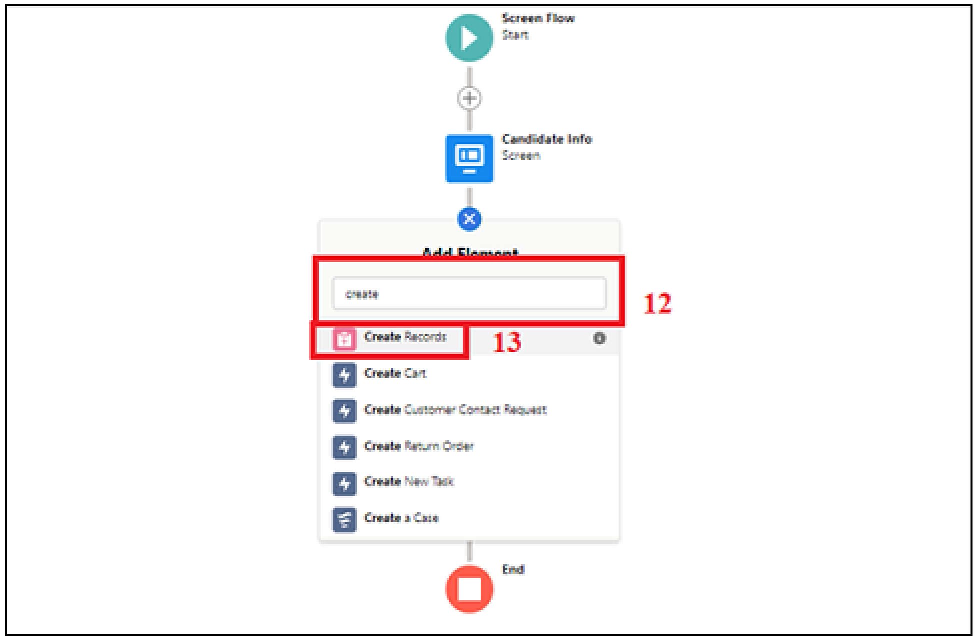
API Name: Candidate_Info (This field will be auto populated.)

7. In search Component type text and drag the text component to canva and give the label and Api Name





8. Select (+)
9. In search bar search for Create records and select the create records



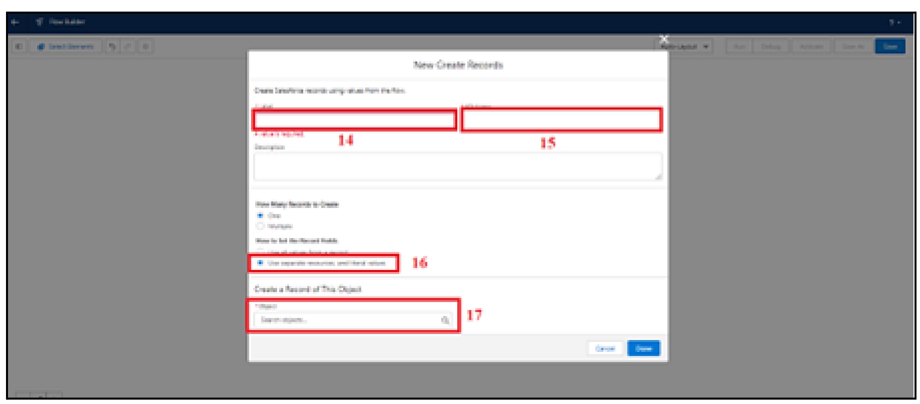
10. It will open you the details section and give the label as follows:

Label: Create candidate Records

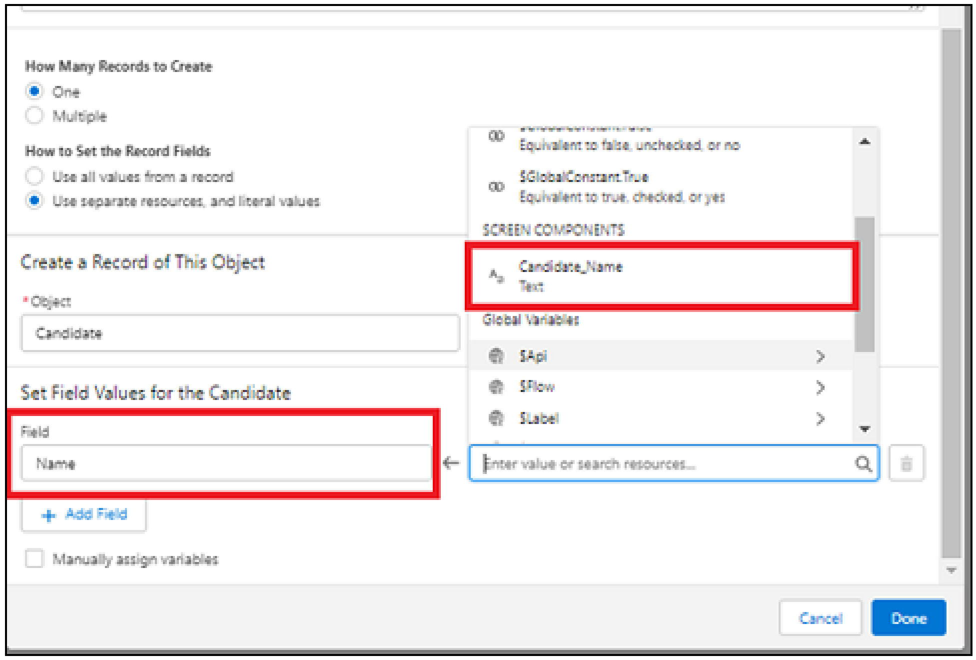
API Name: Create_candidate_Records

Then check the use separate resources and literal values

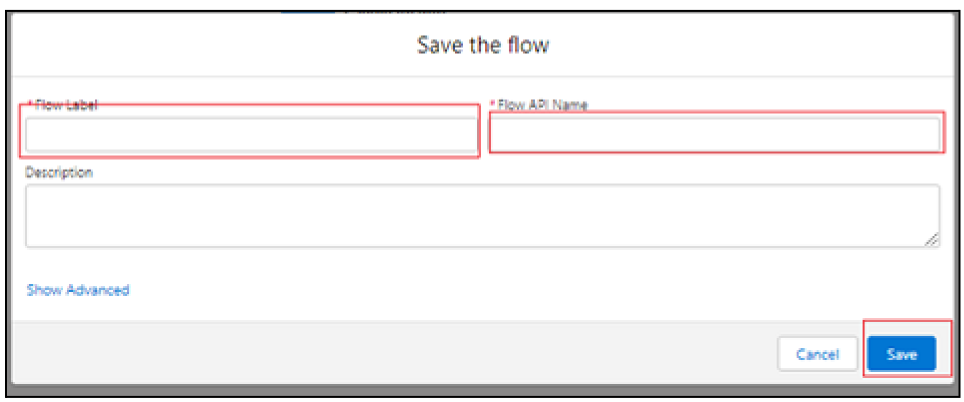
Search for candidate Object



11. Under field type name and select the name and select the candidate_name under Screen Component.



12. Click on Done
13. Click on Save. It will open you details canva and give the details as follows.

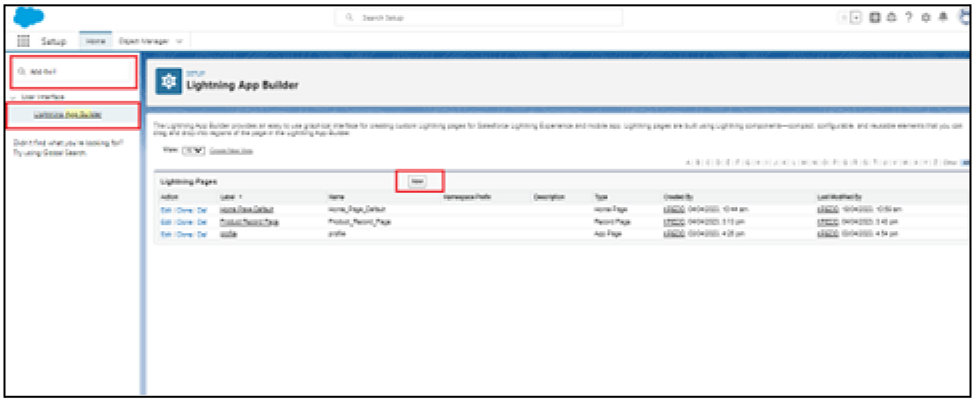


Flow label: Candidate flow
Flow API Name: Candidate_flow(this will be auto populated)

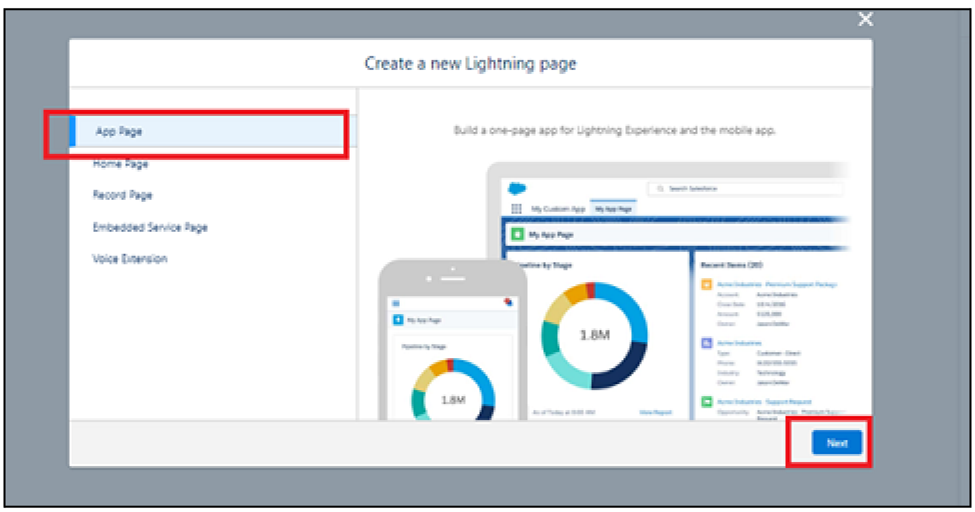
14. Click on save
15. Click on the Activate.

Create An App Page

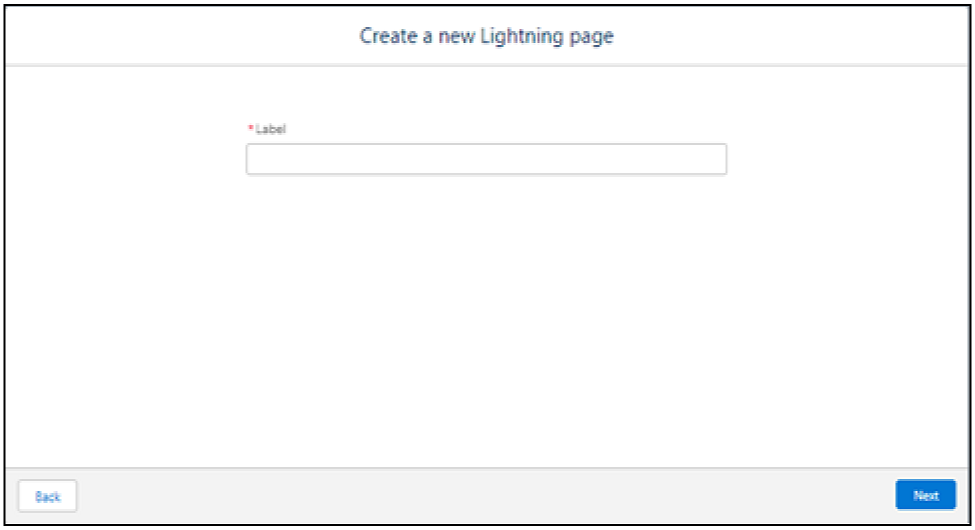
1. Click on the Gear icon and select set up.
2. In Quick Find Box . Type app Builder and select the lighting app builder
3. Select New



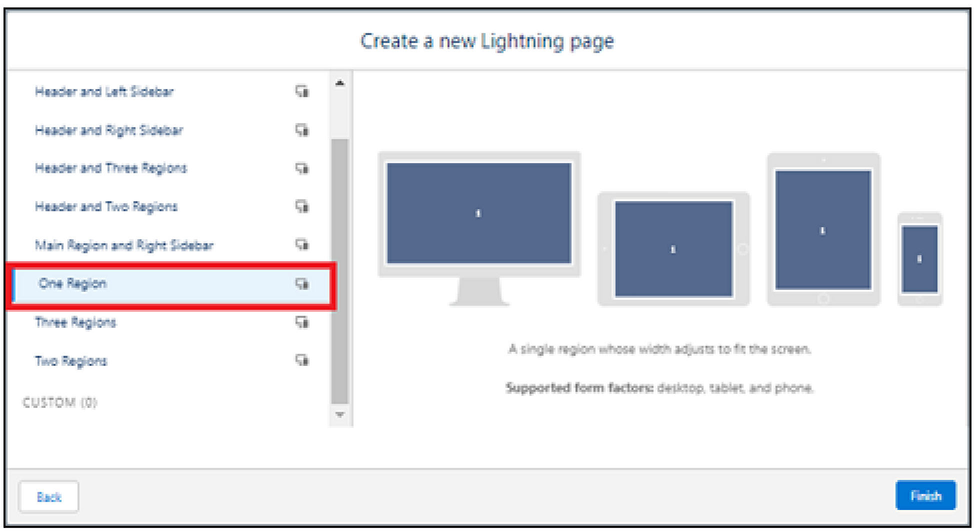
4.Select the App page and click on Next



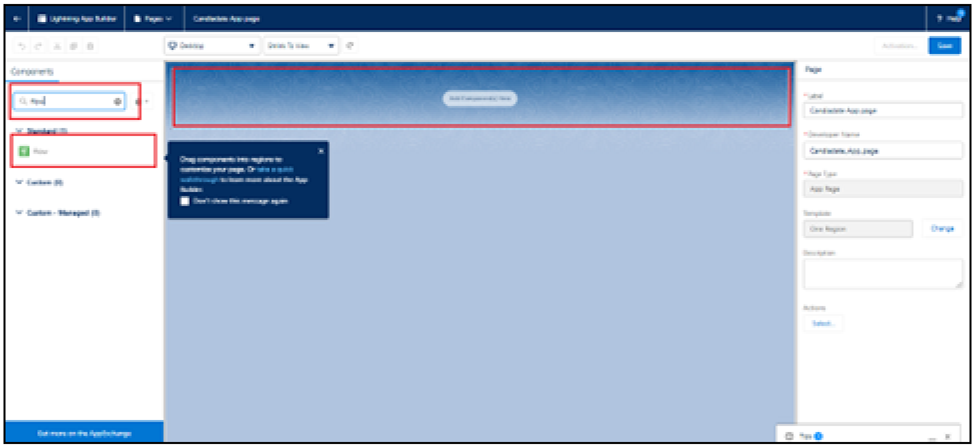
5. Give the label Name.
Label Name: Candidate App page.



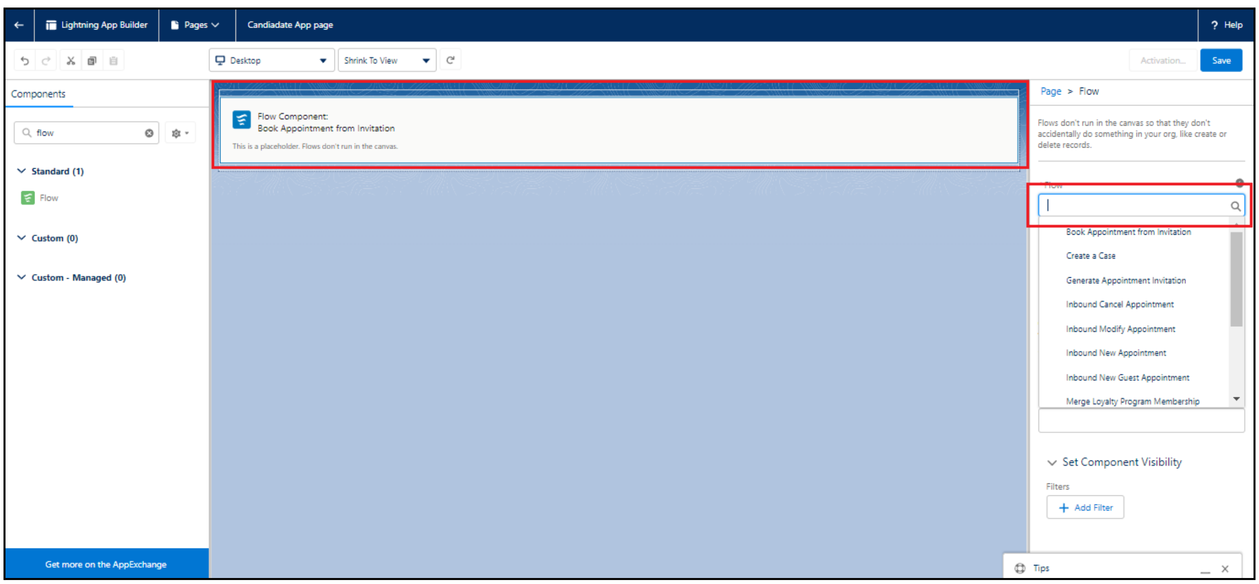
6. Select the one region and click on finish.



7. Type the flow in the search bar and select the flow component and drag the component to the Add components here.



8. After dragging the component, give the flow label in the flow search and then click on save and then click on activate. Flow label:Candidate flow



9. After clicking on the activate it will open a page and then select the lightning experience and

select the app and then click on add page to the app.