

Implementing CRM For Result Tracking Of Candidate

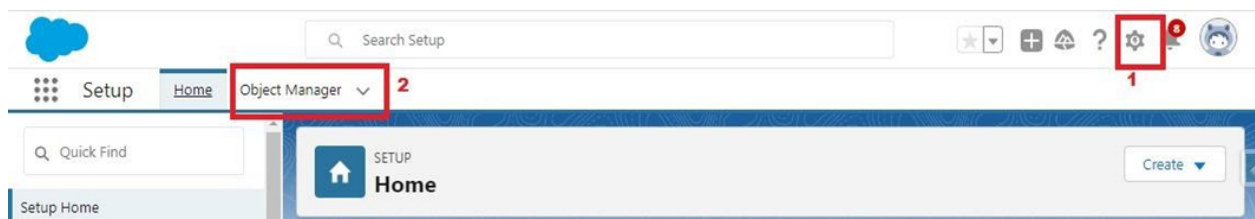
With Internal Marks

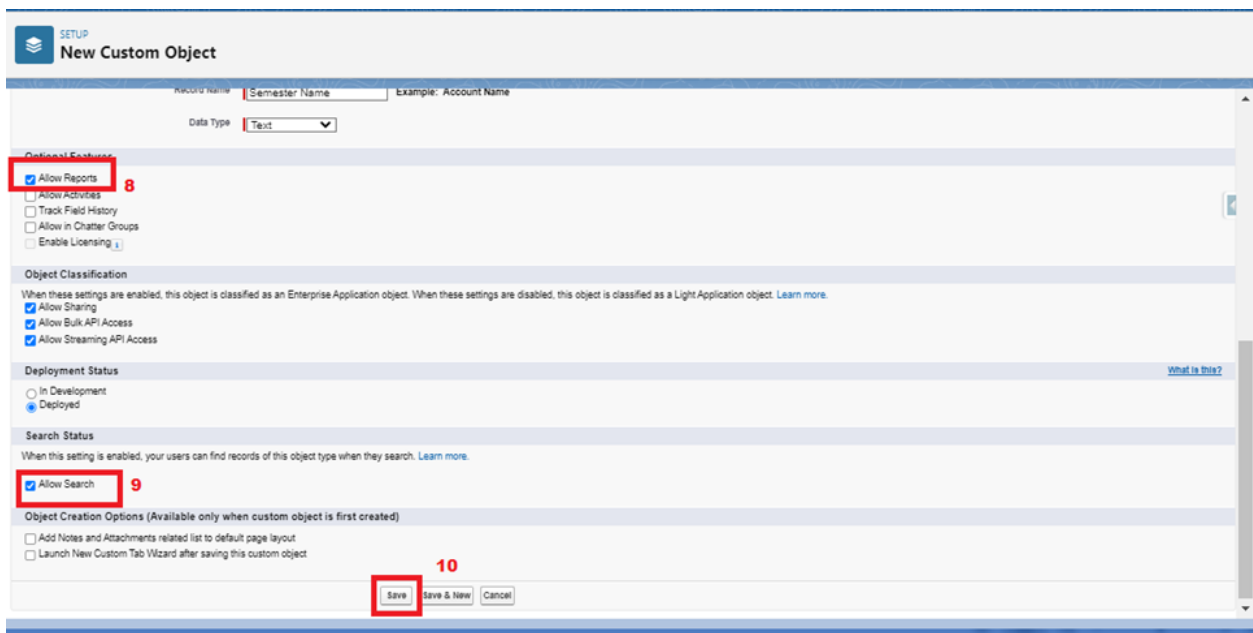
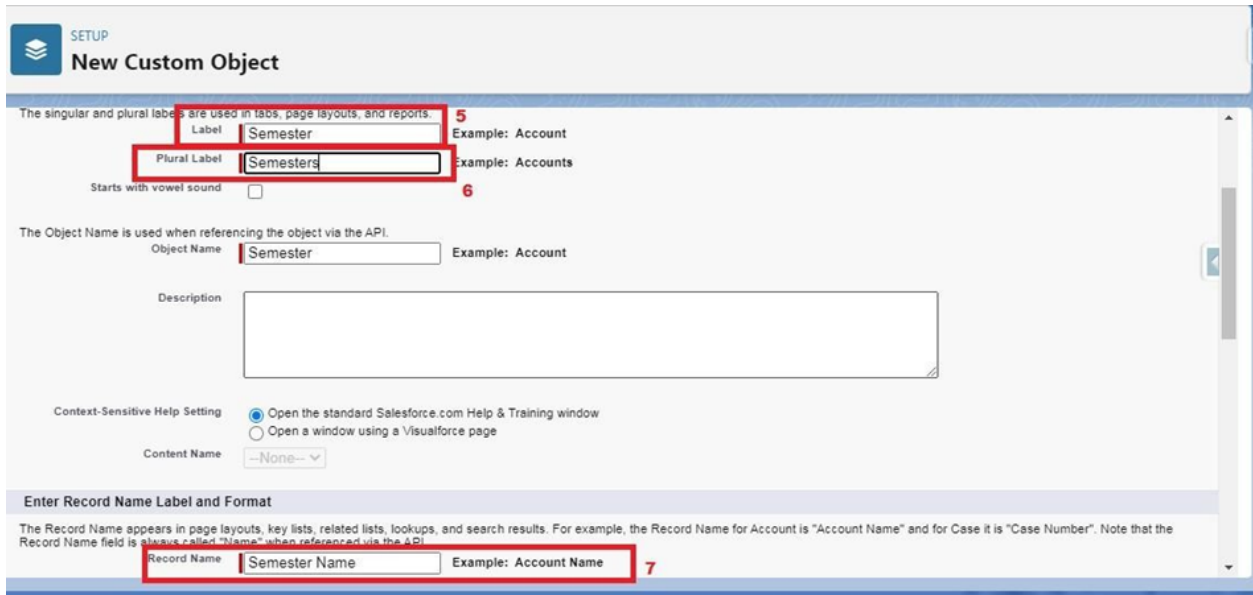
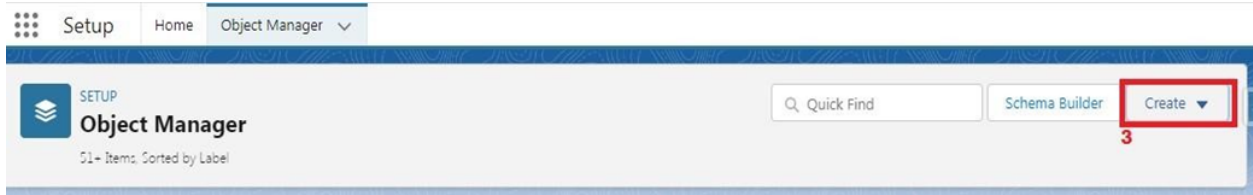
The administrator should be able to create all base data including Semester, Candidate, Course and Lecturer, Lecturer should have the ability to create Internal Results, Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results, Re-evaluation Can be initialized 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 Dropdown click 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**.

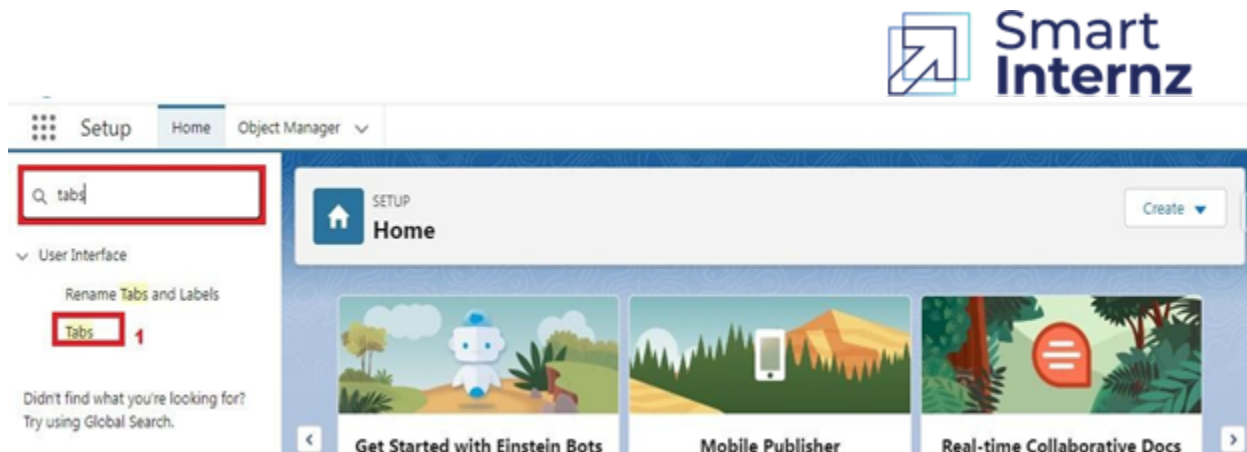




Creation Of Semester Tab

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.

The screenshot displays the Salesforce Setup interface. At the top, the 'Setup' tab is selected, and the 'Object Manager' tab is highlighted with a red box and the number 2. In the top right corner, the gear icon is highlighted with a red box and the number 1. Below the 'Object Manager' header, a table lists objects. The 'Lecturer Details' object is highlighted with a red box and the number 3. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Lecturer Details' row shows API NAME 'Lecturer_Details__c' and TYPE 'Custom Object'. Below the table, the 'Fields & Relationships' section is visible. The 'Fields & Relationships' tab is highlighted with a red box and the number 4. The 'New' button is highlighted with a red box and the number 5. The table below shows fields: Address (Text(50)) and Created By (Lookup(User)).

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecturer Details	Lecturer_Details__c	Custom Object		08/04/2023	✓

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(50)		
Created By	CreatedById	Lookup(User)		

<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text 6	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) i	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> 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.
<input type="radio"/> 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** **9** Cancel

7

Field Label **i**

Please enter the maximum length for a text field below.

8

Length

Field Name **i**

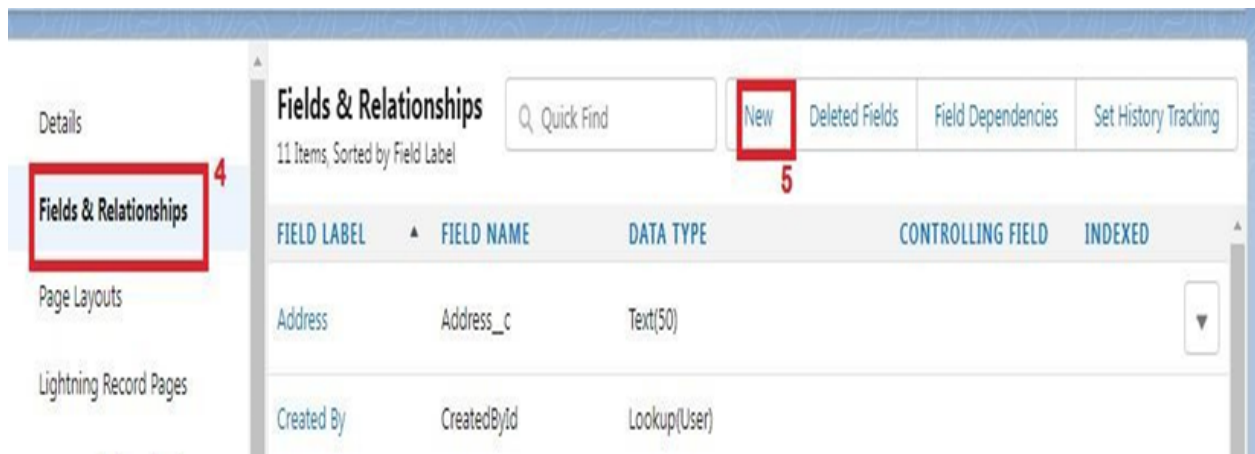
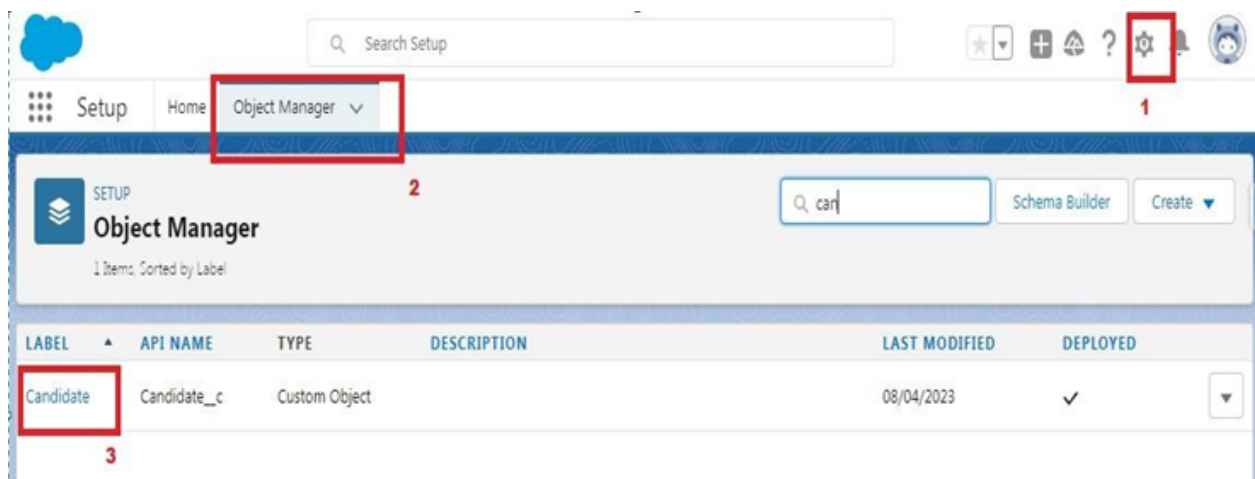
Description

Help Text

i

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.



each new record.

☐ Formula

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.

☐ Roll-Up Summary 

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☒ **Lookup Relationship** 6

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Step 2. Choose the related object Step 2

[Previous](#) [Next](#) [Cancel](#)

Select the other object to which this object is related.

Related To Semester  7

[Previous](#) [Next](#) [Cancel](#)

Field Label Semester Name  8

Field Name Semester_Name 

Description

Help Text 

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

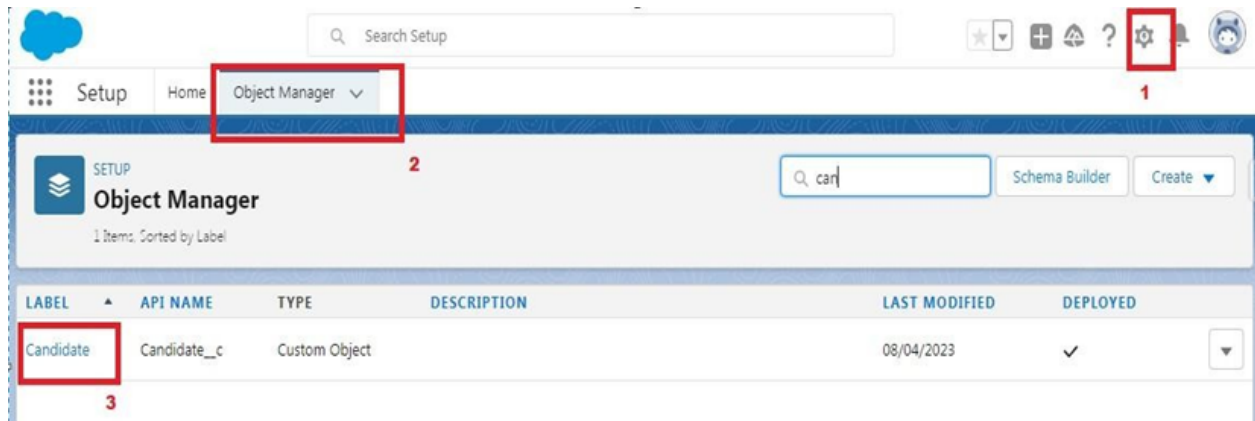
5. Click New

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.



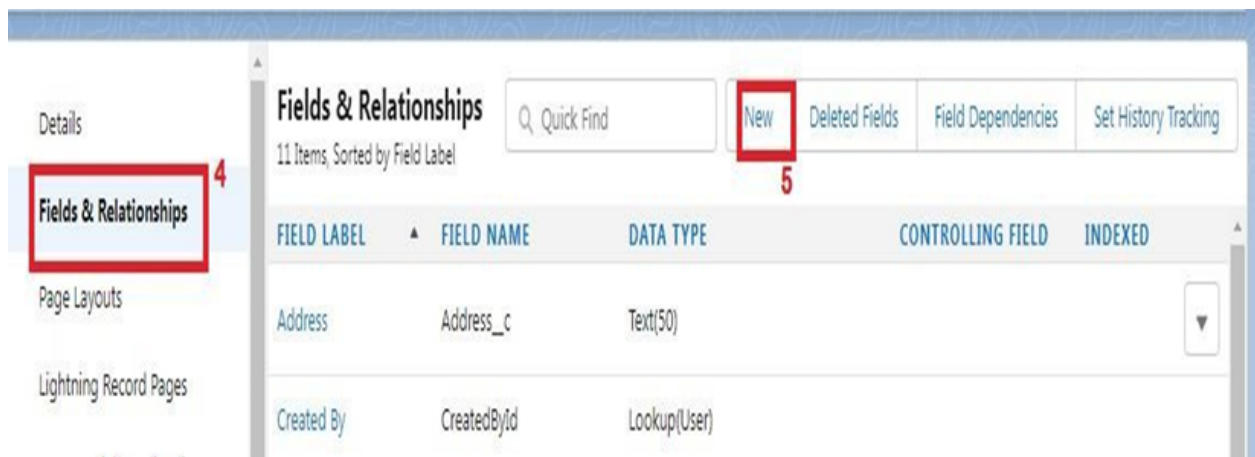
Search Setup

Setup Home Object Manager

Object Manager

1 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Candidate	Candidate__c	Custom Object		08/04/2023	✓



Details

Fields & Relationships

Page Layouts

Lightning Record Pages

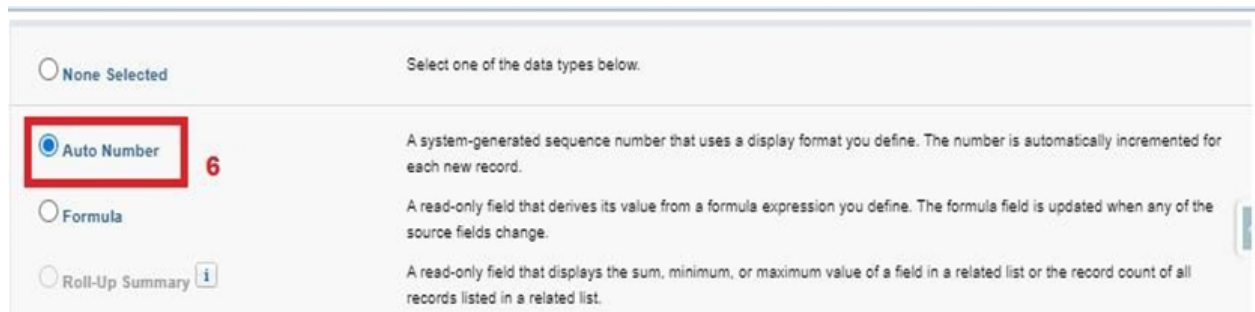
Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New 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)		



None Selected

Select one of the data types below.

Auto Number

Formula

Roll-Up Summary

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label 7

Display Format Example: A-{0000} [What Is This?](#)

Starting Number 8

☐ Generate Auto Number for existing records

Field Name 9

Description

Help Text

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.

Search Setup

Setup Home **Object Manager** 1

Object Manager 2

1 Item, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Course Details 3	Course_Details__c	Custom Object		08/04/2023	✓

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find

New 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)		

Field Label Duration

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length 1 Decimal Places 2

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name Duration

Description

Help Text Enter Course duration value in Years

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

3

Object Manager

1 Items, Sorted by Label

Internal results

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Internal results	Internal_results__c	Custom Object		08/04/2023	✓

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New 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

Formula

6

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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 LabelCandidate Roll Number7

Field NameCandidate_Roll_Numberi

Auto add to custom report type☒ Add this field to existing custom report types that contain this entityi

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`

Example: Full Name = LastName & " " & FirstNameMore Examples...

Simple Formula

Advanced Formula

Insert Field

9

Insert Operator ▾

Candidate Roll Number (Text) =

Functions

-- All Function Categories -- ▾

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

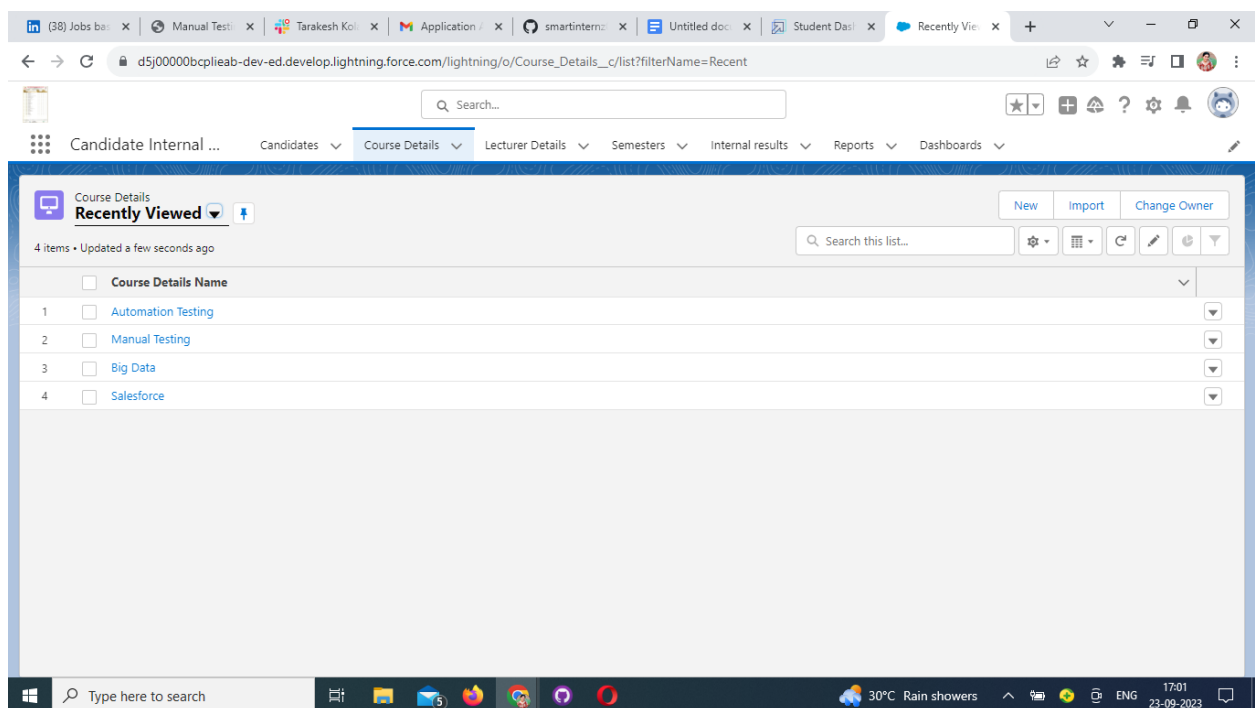
Insert Selected Function

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

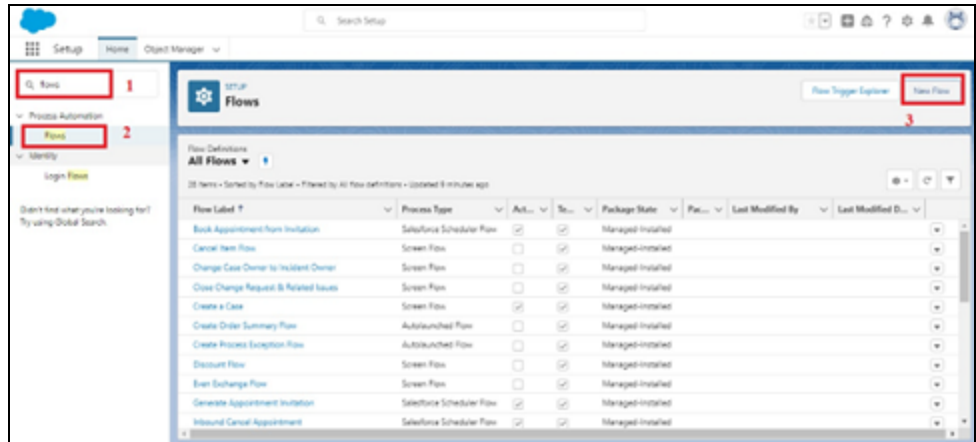
Screen Flow

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.

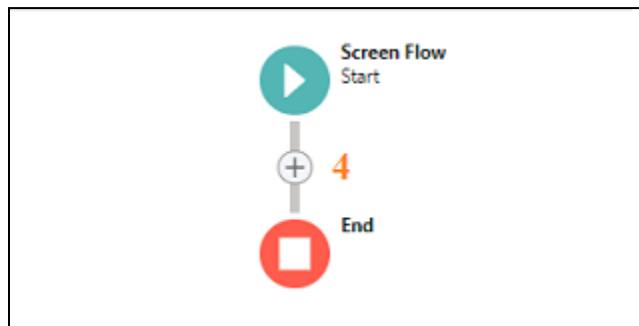
Screen Flows: Screen flows are flows that are designed to guide users through a series of screens to collect data or present information. They are typically used to create user-friendly data entry forms or wizards, and can include input fields, picklists, and other user interface components.

Create A Screen Flow

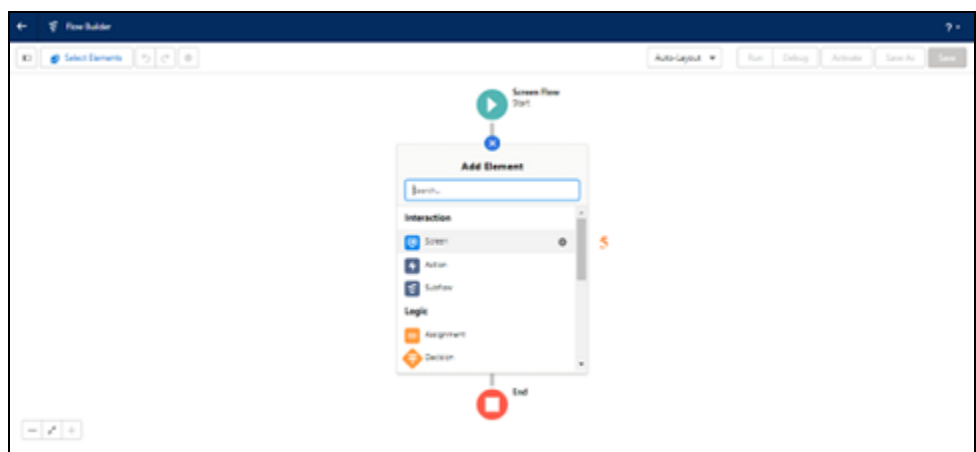
1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow



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



5. Select the screen element from the drop down.

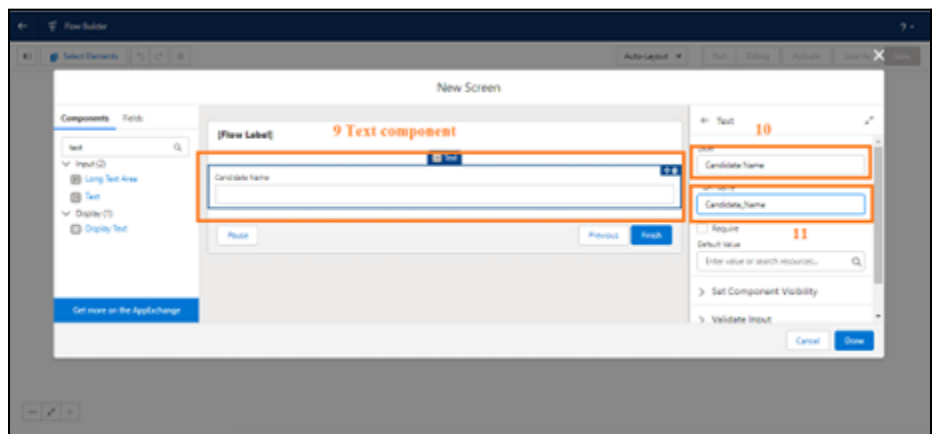
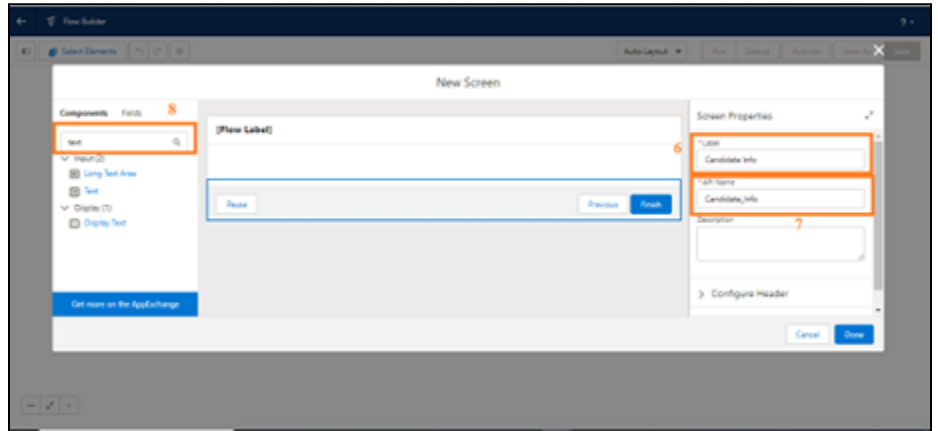


6. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label:Candidate info

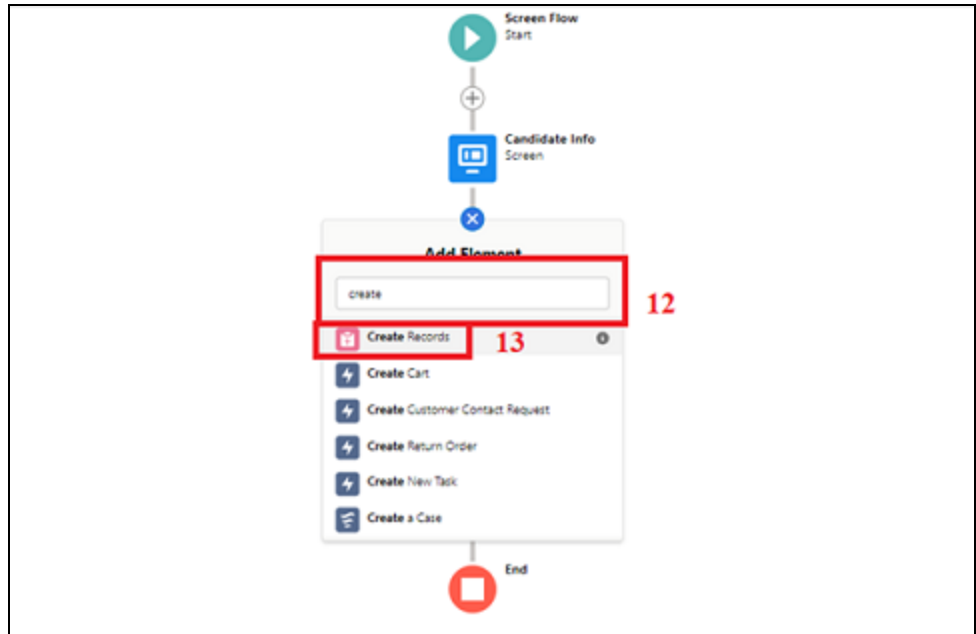
API Name: Candidate_Info (This field will be auto populated.)

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.

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☐ Use all values from a record

☒ Use separate resources, and literal values

Create a Record of This Object

*Object

Candidate

Set Field Values for the Candidate

Field

Name

+ Add Field

☐ Manually assign variables

SCREEN COMPONENTS

Equivalent to false, unchecked, or no

\$GlobalConstant.True

Equivalent to true, checked, or yes

Candidate_Name

Text

Global Variables

\$Api

\$Flow

\$Label

Enter value or search resources...

Cancel Done

12. Click on Done

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

Save the flow

* Flow Label

* Flow API Name

Description

Show Advanced

Cancel Save

Flow label: Candidate flow

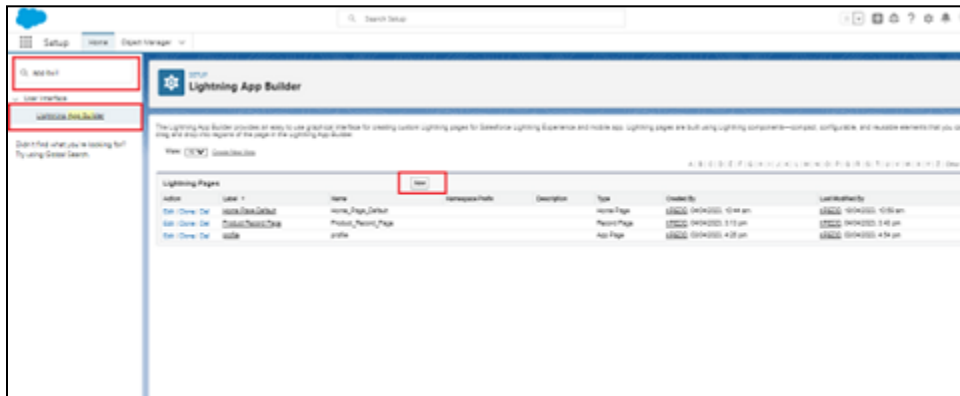
Flow API Name: Candidate_flow(this will be auto populated)

14. Click on save

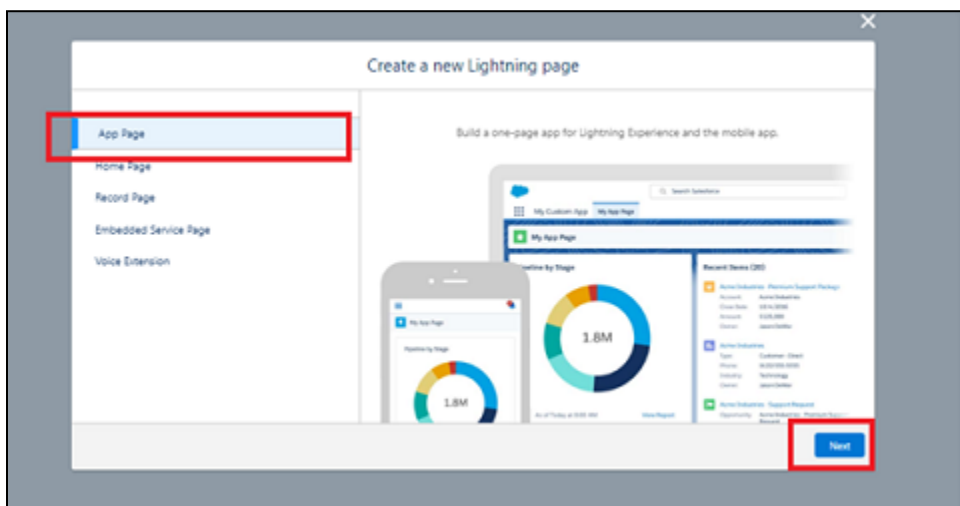
15. Click on the Activate.

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.

Create a new Lightning page

* Label

Back Next

6. Select the one region and click on finish.

Create a new Lightning page

Header and Left Sidebar

Header and Right Sidebar

Header and Three Regions

Header and Two Regions

Main Region and Right Sidebar

One Region

Three Regions

Two Regions

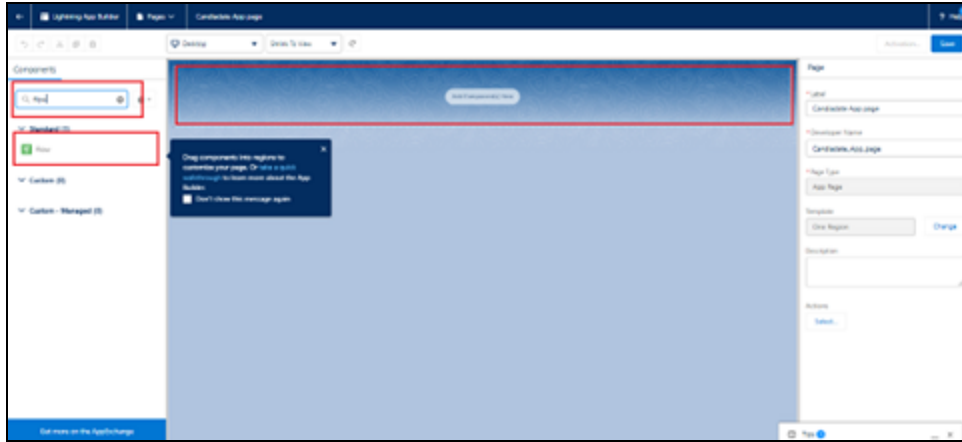
CUSTOM (0)

A single region whose width adjusts to fit the screen.

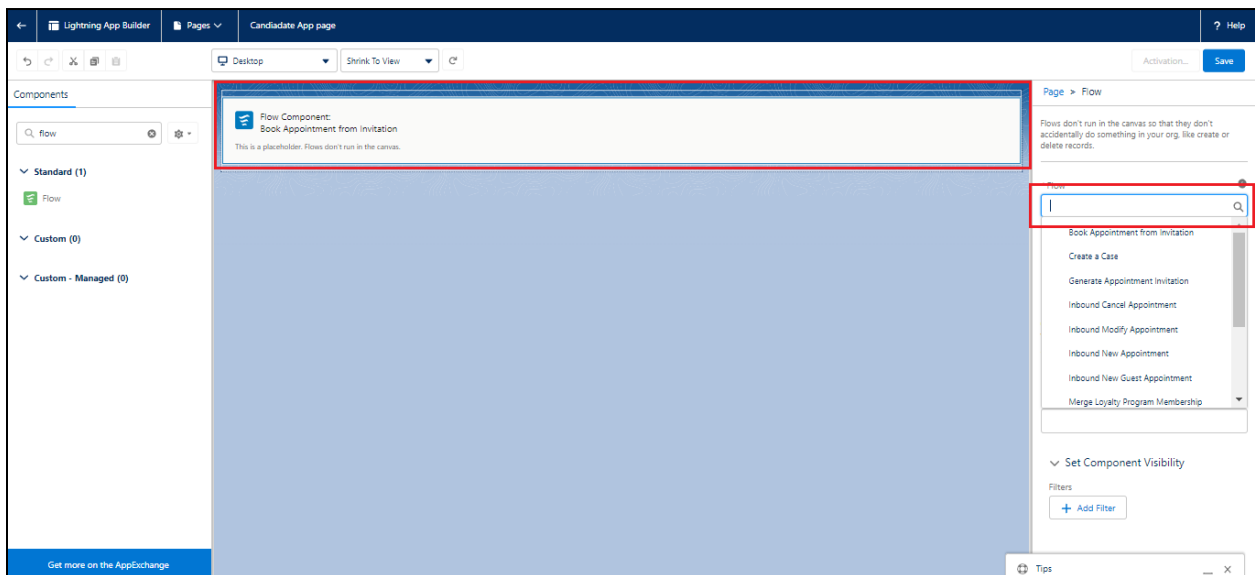
Supported form factors: desktop, tablet, and phone.

Back 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.

