Implementing CRM For Result Tracking Of A Candidate With Internal Marks

NAAN MUDHALVAN

PROJECT REPORT

Submitted by

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in partial fulfilment for the award of the degree of

BACHELOR OF ENGINEERING

in

COMPUTER SCIENCE

AVS ENGINEERING COLLEGE,

SALEM – 636003.

ANNA UNIVERSITY::CHENNAI 600025

BONAFIDE CERTIFICATE

Certified that this the project report titled “Implementing CRM For Result Tracking Of A Candidate With Internal Marks” is the bonafide work of “**PRIYA G(620120104077)**, **SRIMYTHILI S P(620120104099)**, **SUSSMITHA K(620120104102)** ,**PRAGATHI M (620120104075)**” who carried out the project work under my supervision.

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Department of CSE,	Department of CSE,
AVS Engineering College,	AVS Engineering College,
Salem- 636003.	Salem- 636003.

SPOC **HEAD OF DEPARTMENT**

ACKNOWLEDGEMENT

We would like to express our gratitude and appreciation to all those who gave us the possibility to complete this report. We would like to acknowledge with much appreciation to our honorable Chairman, **Shri.K.KAILASAM**, Secretary, **Shri.K.RAJAVINAYAKAM, MBA.,** and also to our Correspondent, **Shri.K.SENTHILKUMAR, B.Tech.,** for providing all necessary facilities for the successful completion of the project.

We have immense pleasure in expressing our gratitude to our beloved Principal, **Dr.J.SUNDARARAJAN, M.E,Ph.D.,** for allowing us to have extensive use of our college facilities to do this project. It gives us a great sense of pleasure in expressing our gratefulness to our beloved Vice Principal's, **Dr.R.VISWANATHAN, M.E.,Ph.D.,** and **Dr.D.R.JOSHUA, M.E.,Ph.D.,** for their professional guidance in scheduling the project work to complete on time.

We express our heartiest gratitude to **Dr.M.VILASINI, M.E.,Ph.D.,** Dean R&D and Head of the Department **Prof.V.MEENA, M.E.,** Department of Computer Science and Engineering for her guidance and encouragement throughout the Project Period. We are indebted to our project coordinator **Mr. G. AROKIANATHAN, M.E.,** Assistant Professor for their constant help and excellent direction.

We specially thank all our Teaching and Non-Teaching Staff Members and Lab Technicians of the **Computer Science and Engineering** for their consistent encouragement to do the project work with full interest and zeal. We pay our profound gratitude to the Almighty God for his invisible vigilance and would like to thank our Parents for giving us support, encouragement and guidance throughout the course of our work.

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LIST OF FIGURES

LIST OF ABBREVATION

ATS	Applicant Tracking System
CRM	Customer Relationship Management
CRM+ATSA	Combined CRM and ATS system
CSM	Candidate Relationship Manager
HR	Human Resources
IR	Internal Result
LMS	Learning Management System
ROI	Return on Investment
SQL	Structured Query Language
UI	User Interface
UX	User Experience
API	Application Programming Interface

CHAPTER-1

1.1.PROJECT SPECIFICATION

The project goal for implementing a CRM for result tracking of a candidate with internal marks is to improve the efficiency, accuracy, and transparency of the result tracking process. A CRM system can automate many of the tasks involved in result tracking, such as data entry, mark calculation, and report generation. This can free up staff time for other tasks and reduce the risk of manual errors.

A CRM system can also provide a central repository for all candidate data, making it easy to access and analyze student performance. This information can be used to identify students who need additional support or enrichment programs, and to make informed decisions about curriculum development and teaching practices.

In addition, a CRM system can help to improve transparency and accountability in the result tracking process. By providing all authorized users with access to real-time data, the system can help to ensure that everyone is on the same page and that students are treated fairly.

Overall, the goal of implementing a CRM for result tracking is to create a more efficient, accurate, and transparent system for tracking student progress. This can lead to improved student outcomes, better decision-making, and a better overall experience for all stakeholders.

1.2.PROJECT GOAL

Project Scope for Implementing a CRM for Result Tracking of a Candidate with Internal Marks

Project Goal: To improve the efficiency, accuracy, and transparency of the result tracking process for candidates with internal marks.

Project Scope: The project will involve the following tasks:

Selection and procurement of a CRM system: The project team will select and procure a CRM system that meets the specific needs of the institution. The system must be able to track internal marks, generate reports on candidate performance, and integrate with existing systems, such as the student information system (SIS) and the learning management system (LMS).

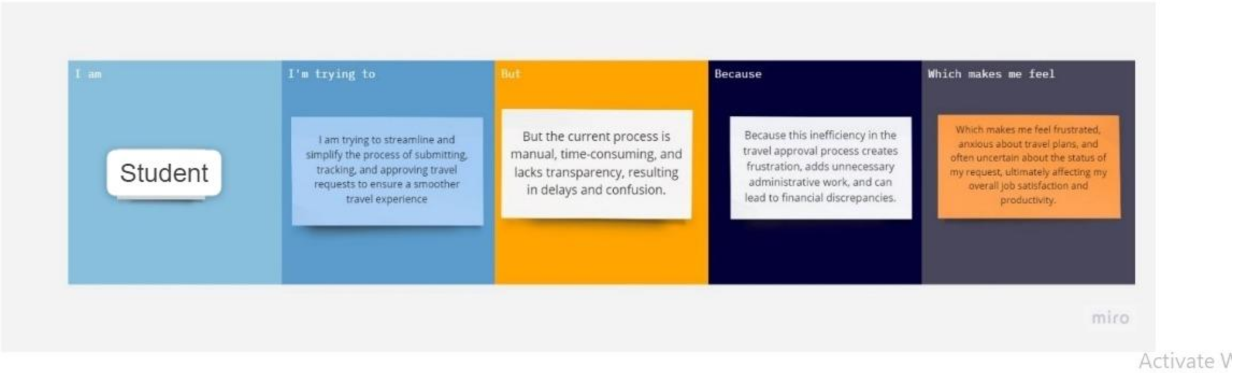
Data migration: The project team will migrate data from existing systems to the new CRM system. This may include data on candidates, courses, and internal marks.

System configuration: The project team will configure the CRM system to meet the specific requirements of the institution. This may include setting up user roles and permissions, defining assessment types, and creating custom reports.

User training: The project team will train staff on how to use the CRM system. This will include training on how to enter and track internal marks, generate reports, and manage user accounts.

System launch and support: The project team will launch the CRM system and provide support to users during the transition period.

1.3 Problem Statement Definition:

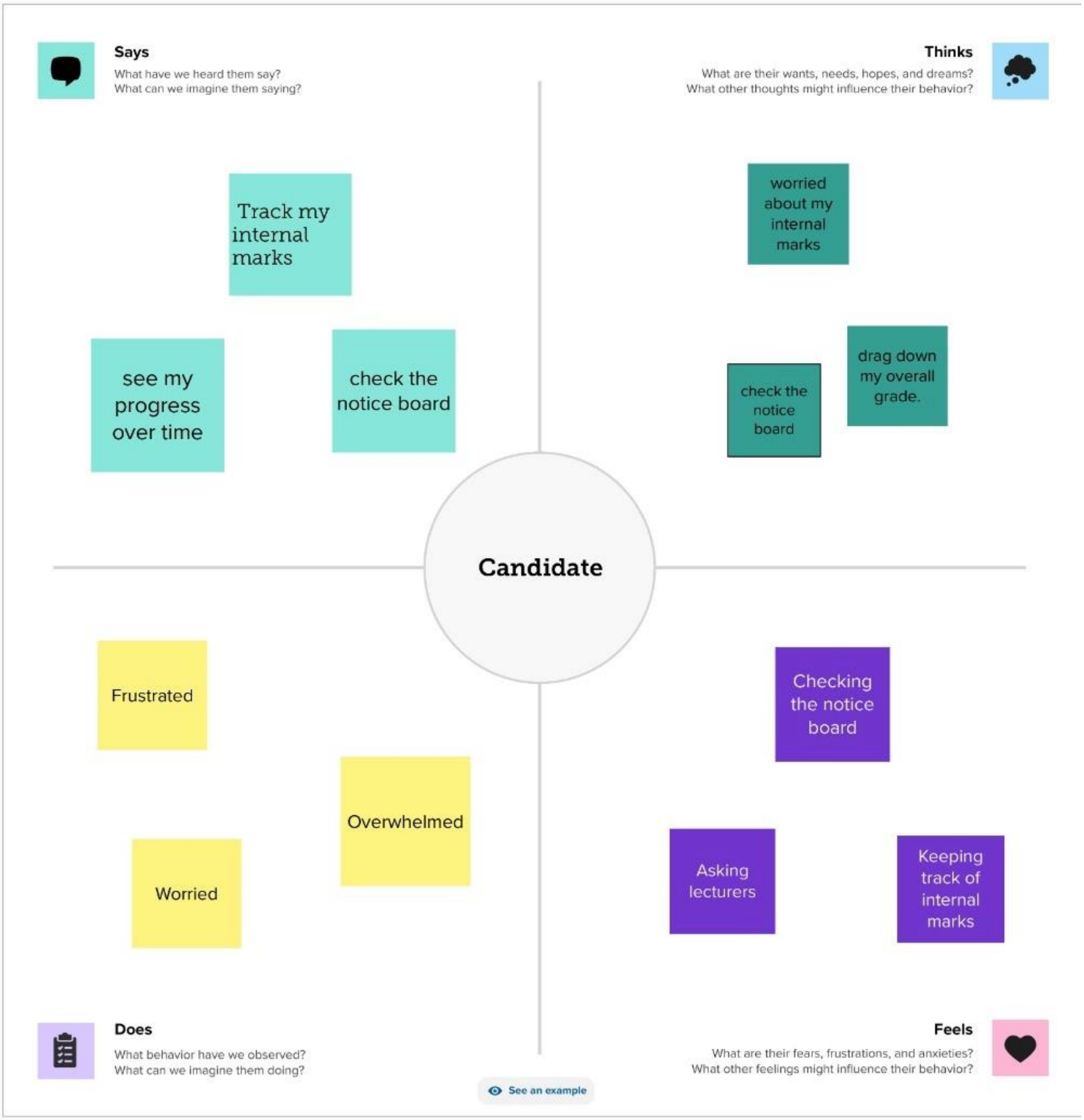


Problem Statement (PS)	I am (Student)	I'm trying to	But Because	Which makes me feel
Implementing CRM for Result Tracking for a Candidate with Internal Marks	A student in an educational institution	Access and review my internal marks and academic progress	The existing process is opaque, and I have limited visibility into my performance	Anxious and uninformed about my academic standing, hindering my ability to make informed decisions and improvements

1.4 Empathy Map Canvas :

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to helps teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.

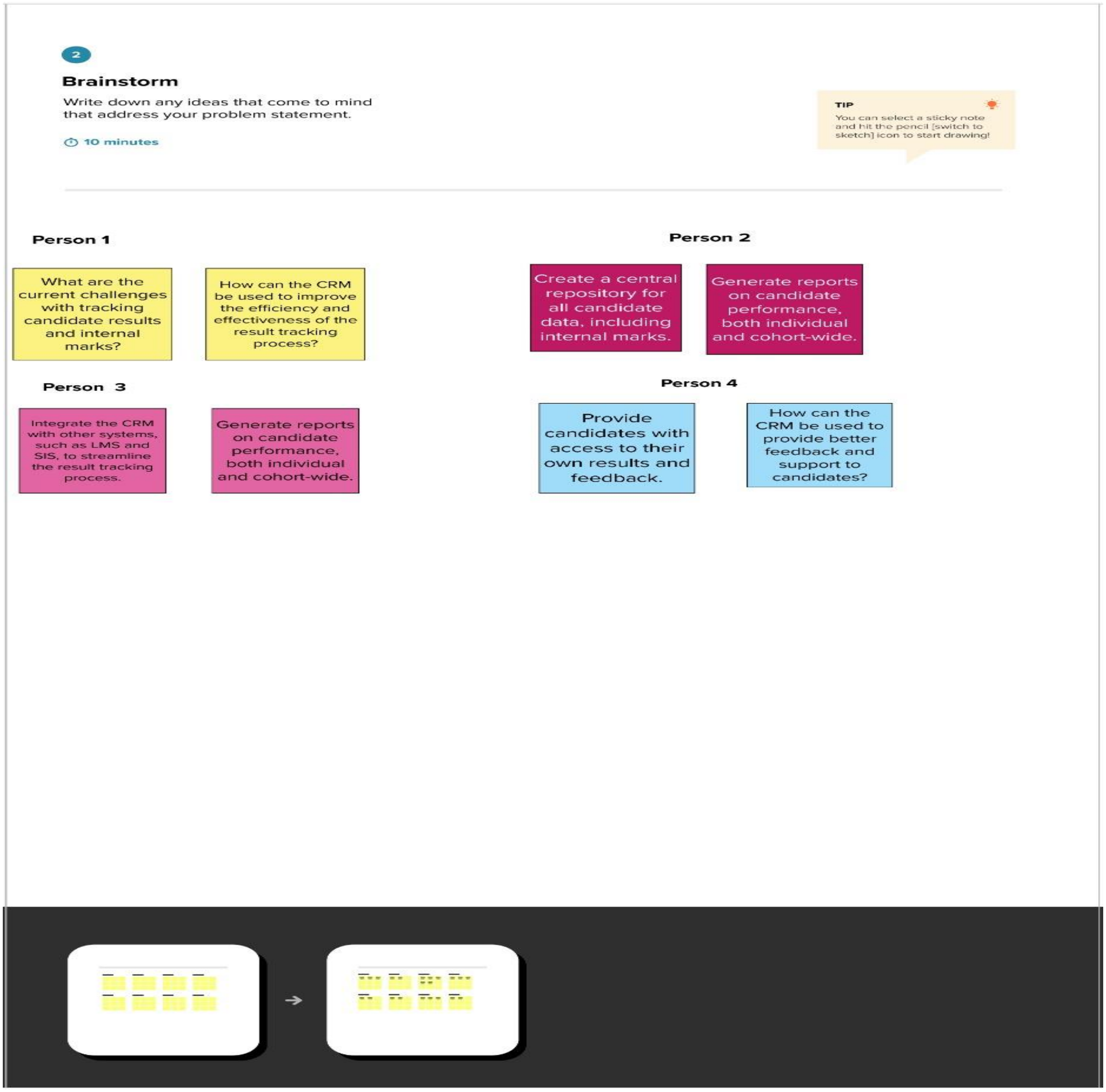


1.5 Ideation & Brainstorming

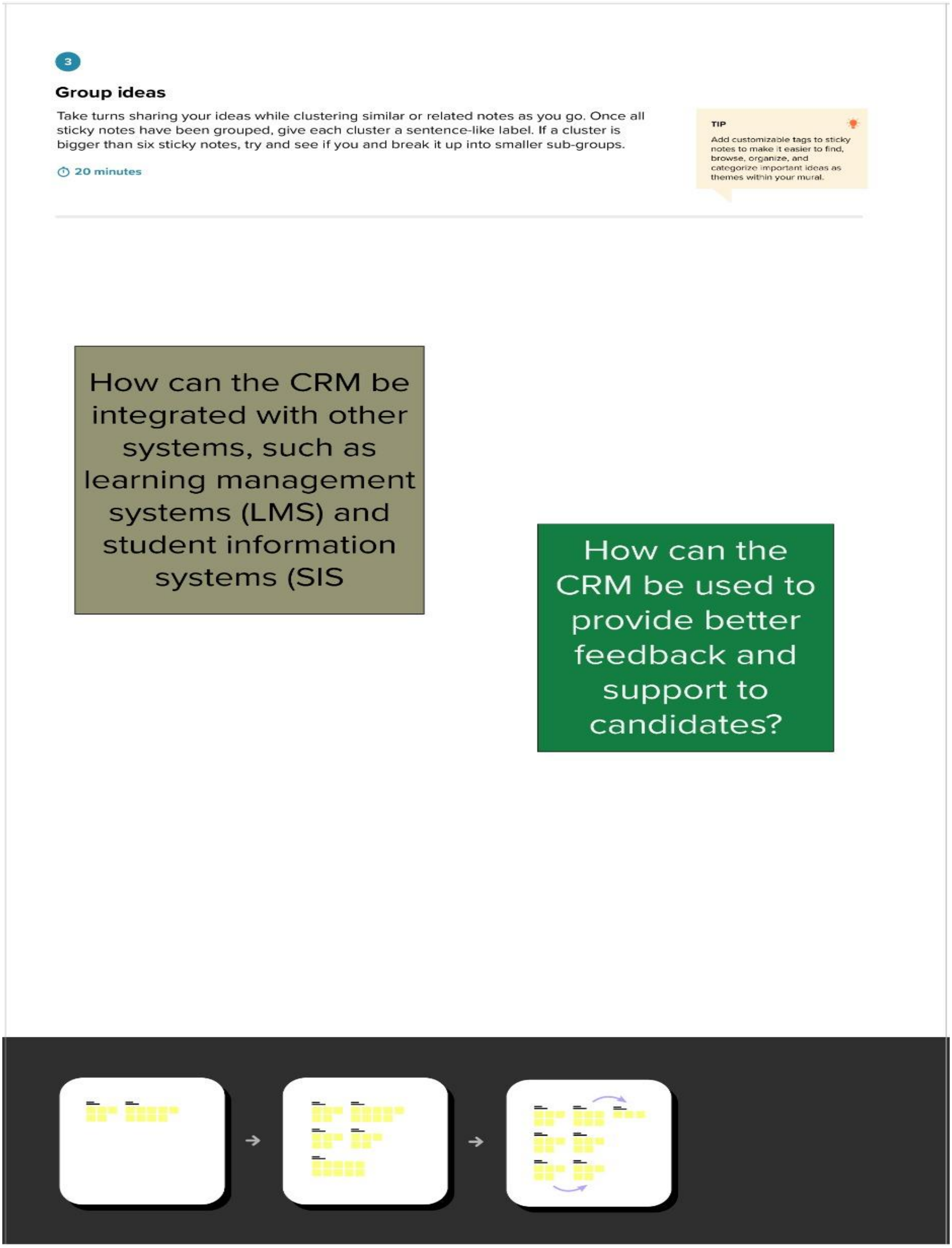
Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving.

Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

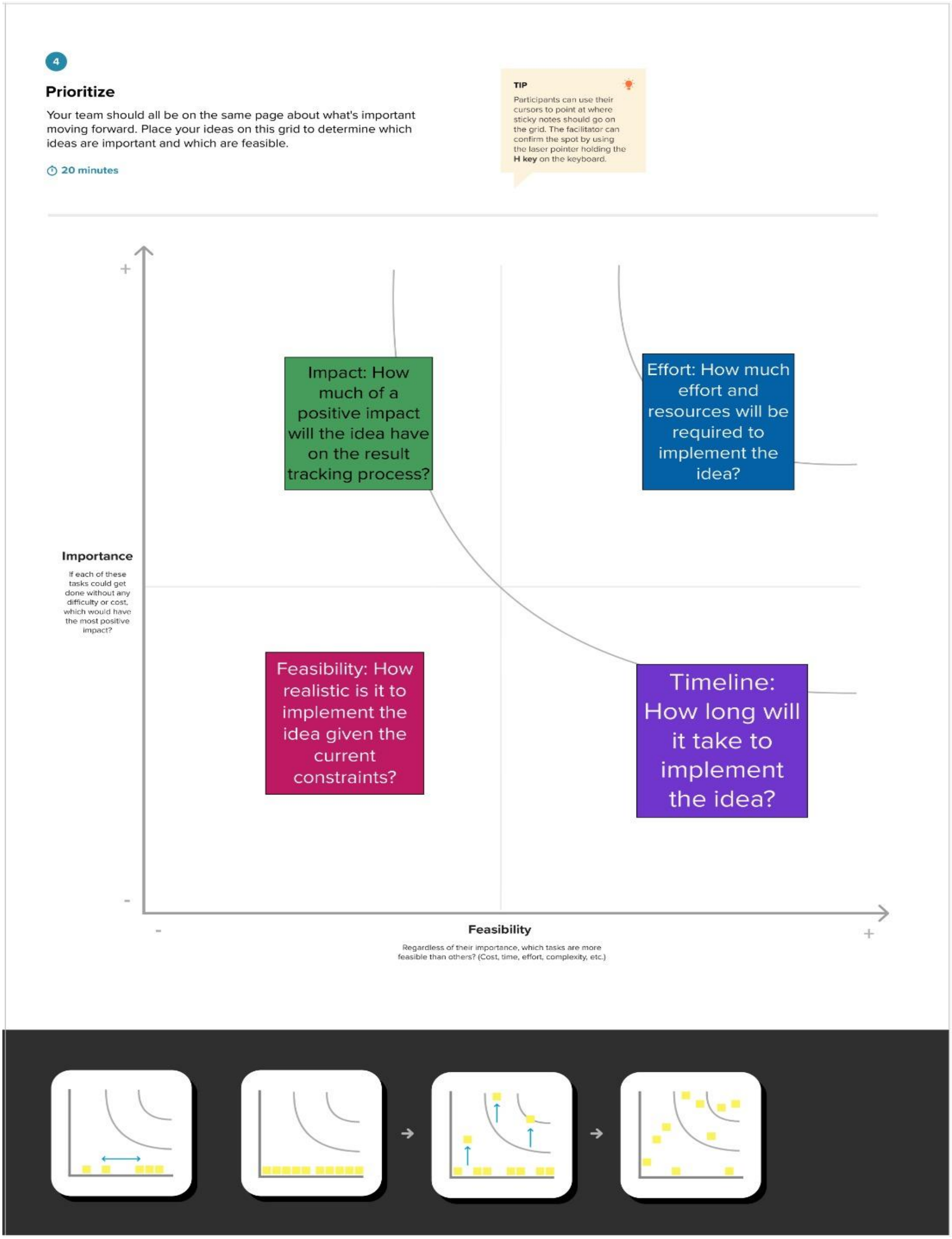
Step-1: Team Gathering, Collaboration and Select the Problem Statement:



Step-2: Brainstorm, Idea Listing and Grouping:



Step-3: Idea Prioritization:



1.6.Proposed Solution:

S.NO	Parameter	Description
1	Select and procure a CRM system	When selecting a CRM system, it is important to consider the specific needs of the institution. The system should be able to track internal marks, generate reports on candidate performance, and integrate with existing systems, such as the student information system (SIS) and the learning management system (LMS).
2	Migrate data from existing systems to the new CRM system	Once a CRM system has been selected, the project team will need to migrate data from existing systems to the new system. This may include data on candidates, courses, and internal marks. It is important to develop a detailed data migration plan and test it thoroughly before migrating data to the new system. This will help to ensure that the data is migrated accurately and completely.
3	Configure the CRM system to meet the specific requirements of the institution	Once the data has been migrated, the project team will need to configure the CRM system to meet the specific requirements of the institution. This may include setting up user roles and permissions, defining assessment types, and creating custom reports. It is important to work closely with users to gather requirements and to ensure that the system is configured to meet their needs.
4	Train staff on how to use the CRM	Once the CRM system has been configured,

	system	the project team will need to train staff on how to use the system. This training should include how to enter and track internal marks, generate reports, and manage user accounts. It is important to provide comprehensive training to staff so that they are able to use the system effectively.
5	Launch the system and provide support to users during the transition period	Once staff have been trained, the project team can launch the CRM system. It is important to provide support to users during the transition period to help them learn how to use the new system. This support may include providing online resources, answering questions, and resolving any problems that users encounter.
6	Monitor and evaluate the system on an ongoing basis	Once the CRM system has been launched, it is important to monitor and evaluate the system on an ongoing basis. This will help to identify any areas where the system can be improved. The project team can collect feedback from users and use this feedback to make improvements to the system. Additionally, the project team can monitor the system's performance and identify any areas where the system can be optimized.

1.7 Functional & Technical Requirements:

1.7.1 Functional Requirements:

FR.NO	Requirement	Description
FR-1	Candidate management	Create and manage candidate profiles, including contact information, academic history, and internal marks.
FR-2	Internal mark tracking	Enter and calculate internal marks for each assessment.
FR-3	Result analysis	Generate reports on candidate performance, such as average marks, grade distribution, and trends over time.
FR-4	User management	Create and manage user accounts, and define user roles and permissions.
FR-5	Data integration	Integrate the CRM system with other systems, such as student information systems (SIS) and learning management systems (LMS).

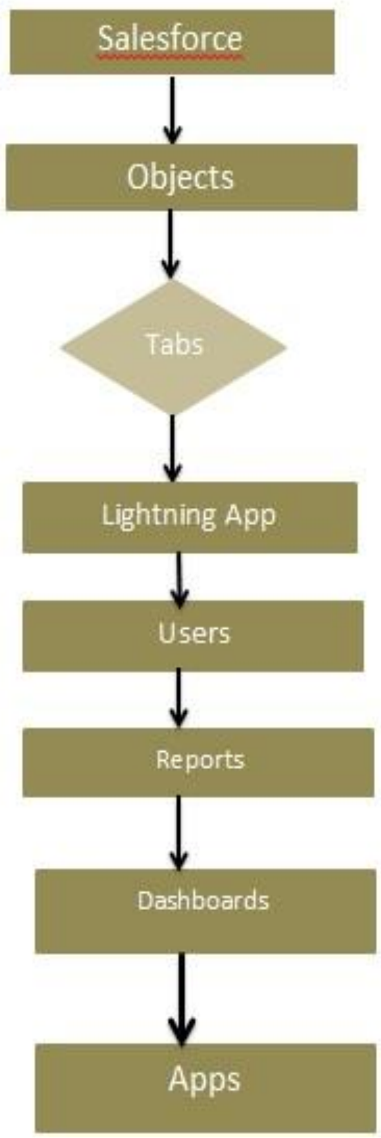
1.7.1 Technical Requirements:

TR-NO.	Requirement	Description
TR-1	Hardware requirements	The CRM system must be able to run on the institution's existing hardware infrastructure.
TR-2	Software requirements	The CRM system must be compatible with the institution's existing software infrastructure.
TR-3	Security requirements	The CRM system must meet the institution's security requirements, including data encryption and user authentication.
TR-4	Scalability requirements	The CRM system must be able to scale to meet the needs of the institution as it grows.
TR-5	Performance requirements	The CRM system must be able to handle the expected volume of traffic and data without impacting performance.

1.8 Project Road Map:

1.8.1 Data Flow Diagram :

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



1.8.2 Technical Archictecture:

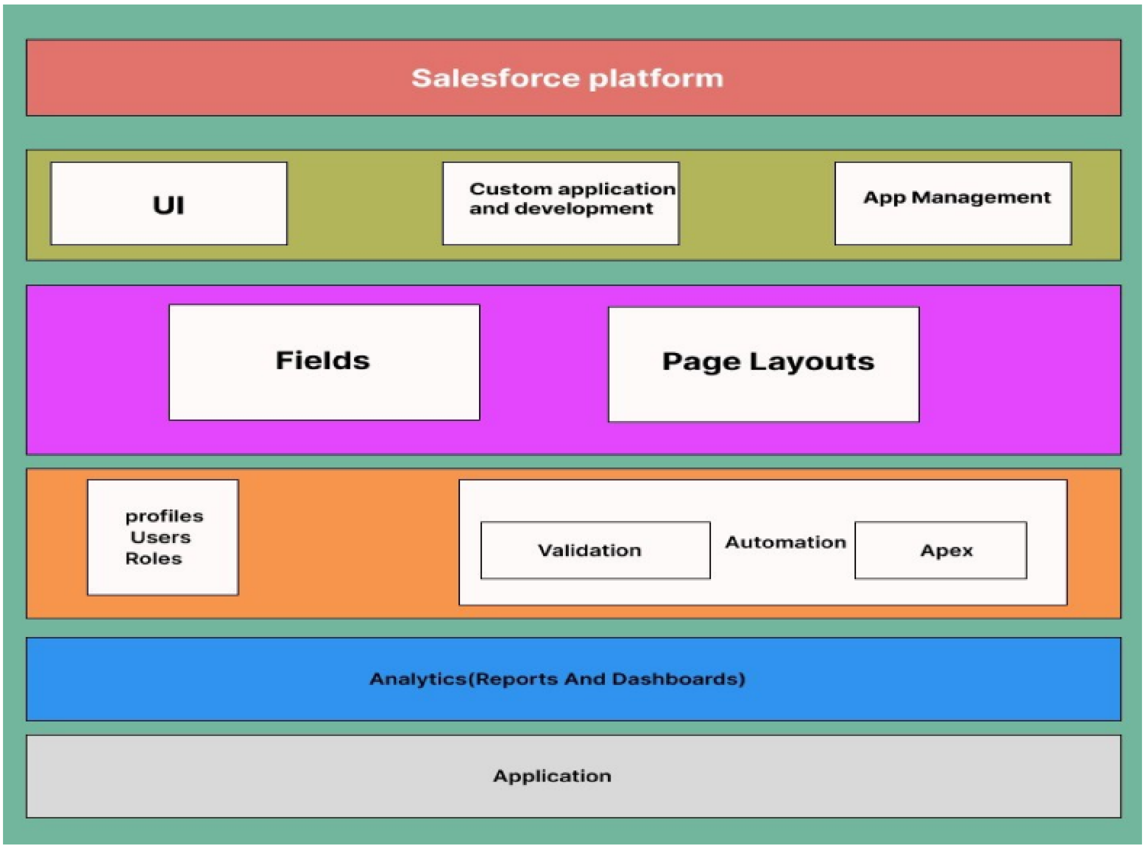


TABLE-1: Component and Technologies:

S.No	Component	Description	Technology
1.	User Interface	**Lightning Components:** Use Salesforce Lightning components to design the user interface for employees, managers, and administrators. **Custom Pages:** Create custom Visualforce pages for more tailored and complex UI elements	Salesforce
2.	Data Model	**Custom Objects:** Define custom objects in Salesforce to represent	Salesforce

		entities like travel requests, expenses, and approvals. Master-Detail and **Lookup Relationships:** Establish relationships between objects to maintain data integrity. Custom **Fields:** Create custom fields to capture specific information, such as travel dates, expenses, and approval	
3.	Workflow Automation	**Approval Processes**: Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow. Process **Builder and Flows:** Use Process Builder and Flows to automate routine tasks and send notifications.	Salesforce
4.	Reporting and Analytics	**Custom Reports:** Create custom reports to track travel request status, expenses, and other relevant metrics.	Salesforce
5.	Security	**Role-Based Access Control (RBAC):** Configure RBAC to control who can access and modify data**.** **Data Encryption:** Encrypt sensitive data both in transit and at rest. Audit **Trails:** Maintain audit trails to log user activities for security and compliance purposes.	Salesforce
6.	Salesforce Development	**Apex:** Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation. **Visualforce:** Develop custom user interfaces with Visualforce pages and components. **Lightning Web Components:** Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience	Salesforce

Table-2: Application Characteristics:

S. No	Characteristics	Description	Technology
1.	Responsive Design	Implement responsive design to adapt to various screen sizes, ensuring a consistent and visually pleasing user experience	Salesforce
2.	Accessibility	Ensure that the application is accessible via multiple devices and browsers, catering to users on desktops, tablets, and mobile devices. This accessibility is crucial for users who need to make or approve travel requests while on the go.	Salesforce
3.	User-friendly	The application should have an intuitive and user-friendly interface to make it easy for employees, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	Salesforce
5.	Performance	Ensure the application's	Salesforce

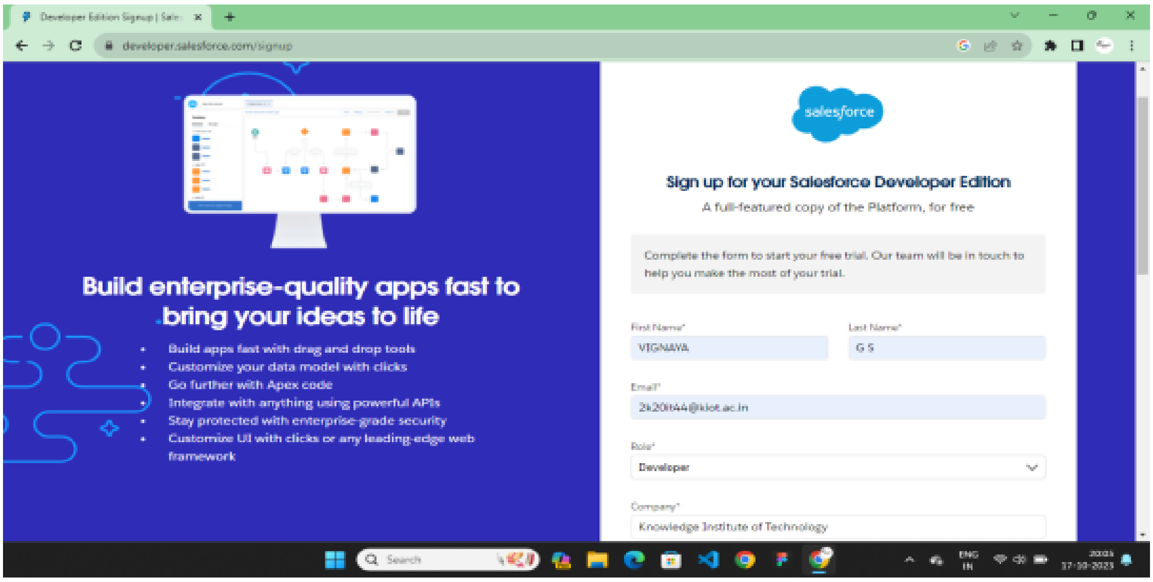
		performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	
6.	Reporting and Analytics	Enable users to generate custom reports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.	Salesforce

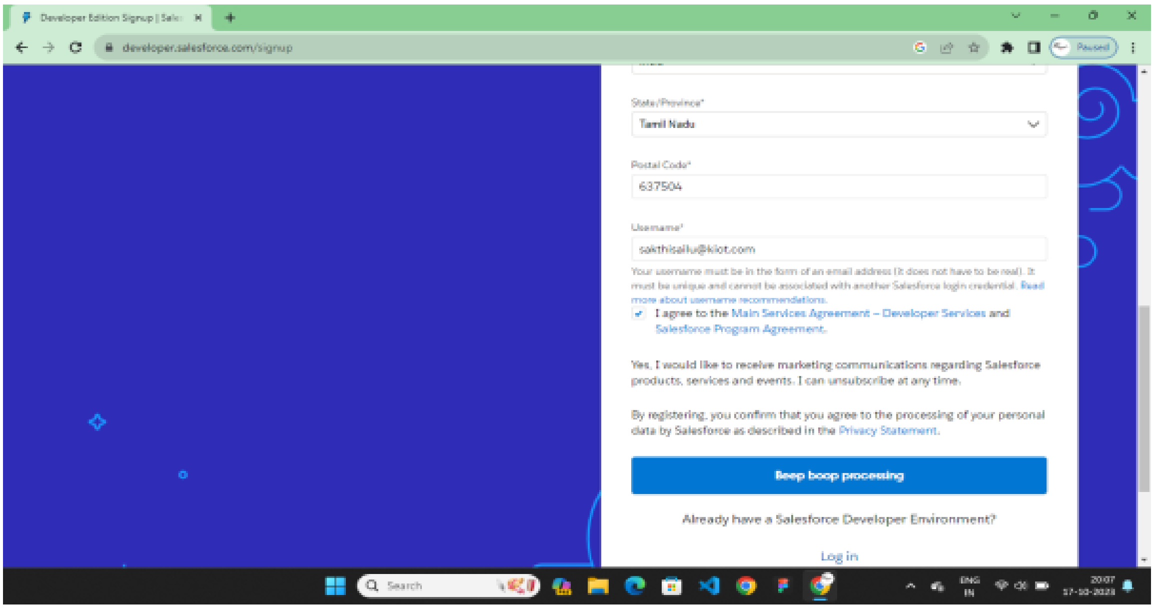
CHAPTER-2

PREPARATION DATA MODELING

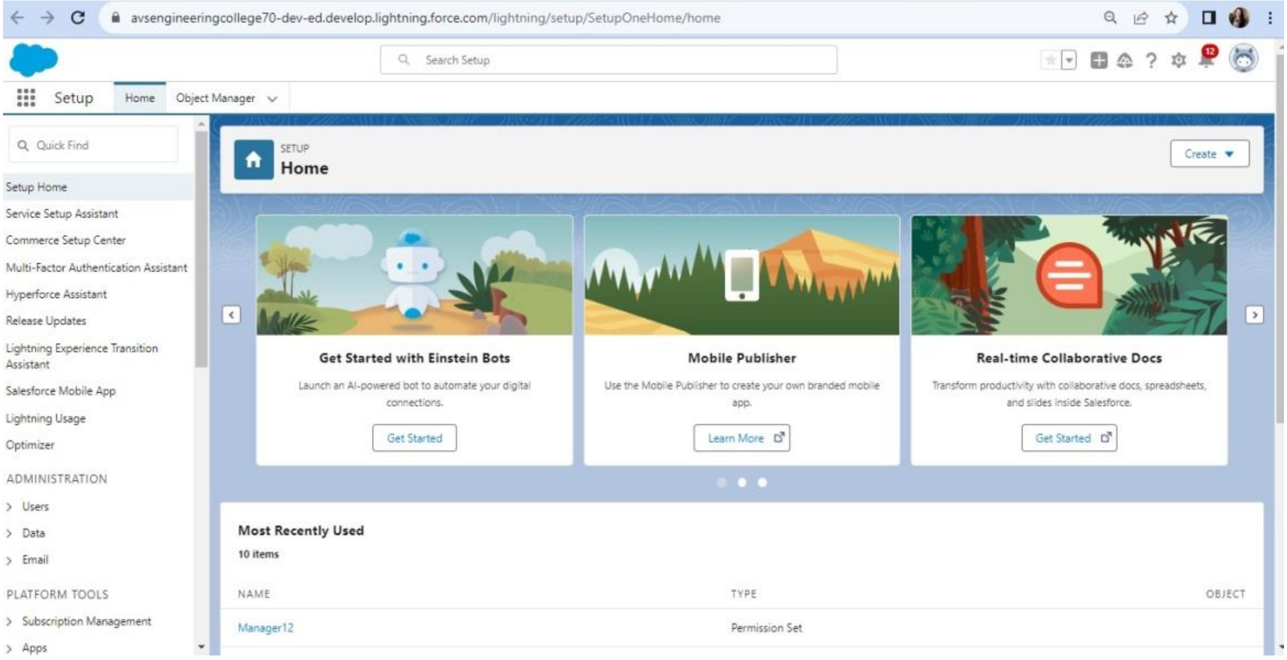
2.1 Salesforce Developer Org:

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.





2.2.OBJECTS: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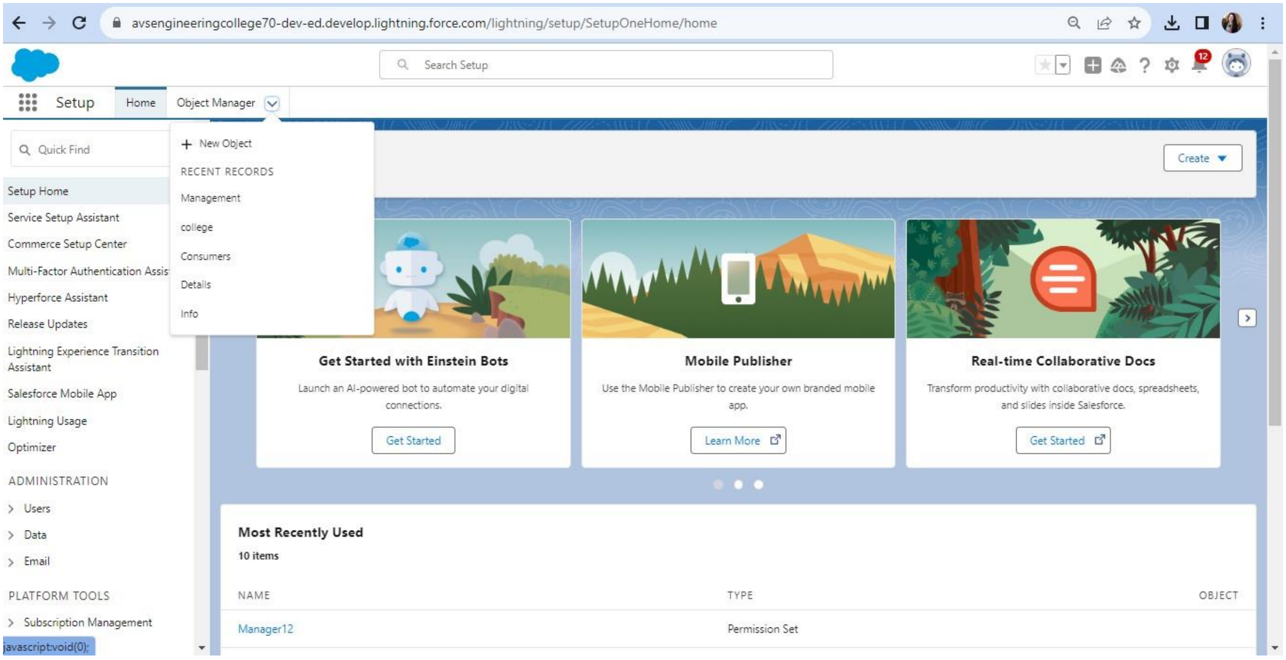
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Center
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT
Manager12
Permission Set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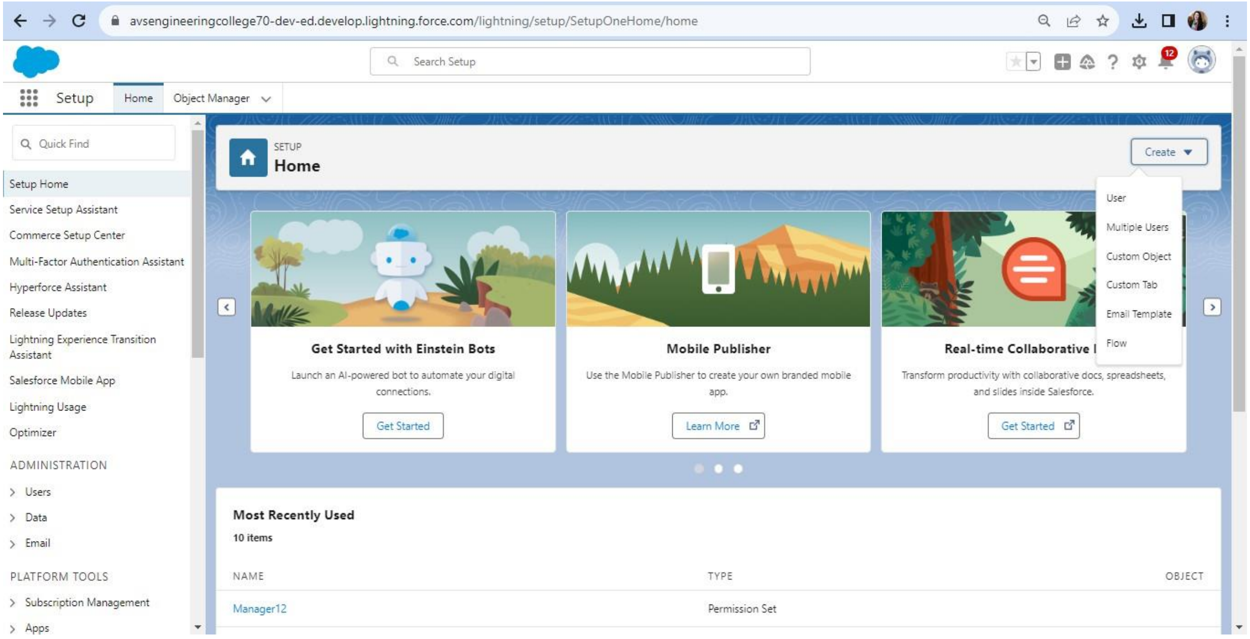
Search Setup
Setup
Home
Object Manager
New Object
RECENT RECORDS
Management
college
Consumers
Details
Info
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT
Manager12
Permission Set
javascript:void(0);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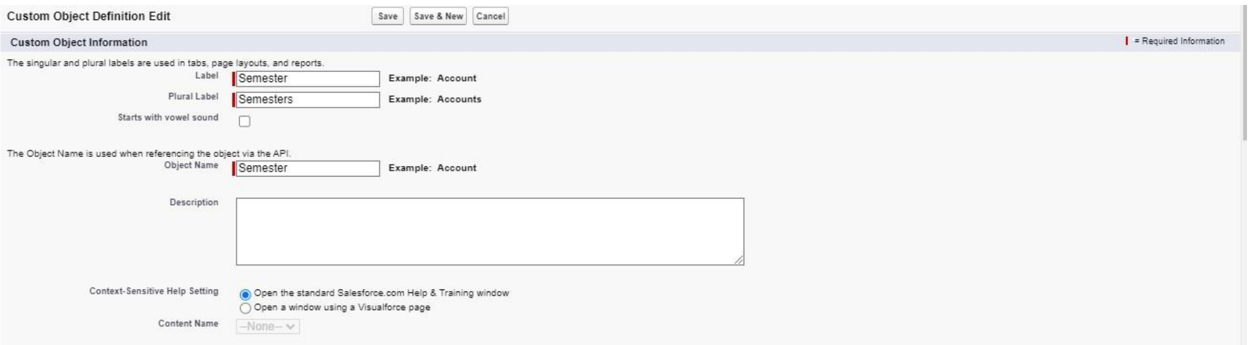
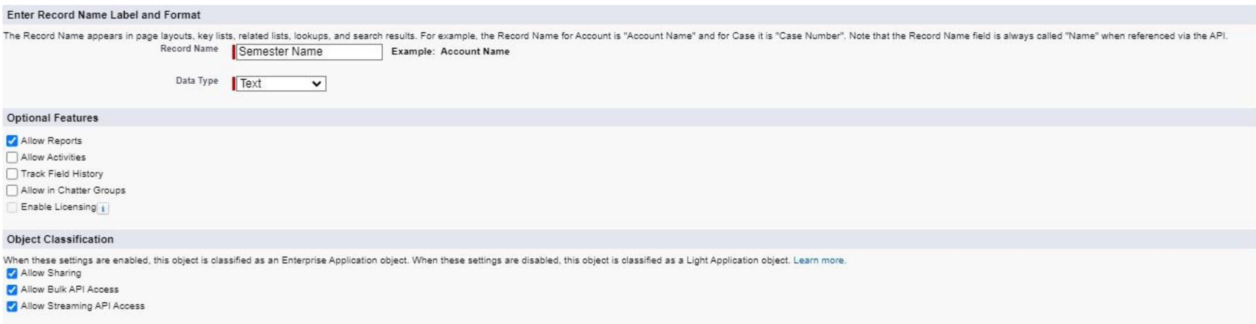
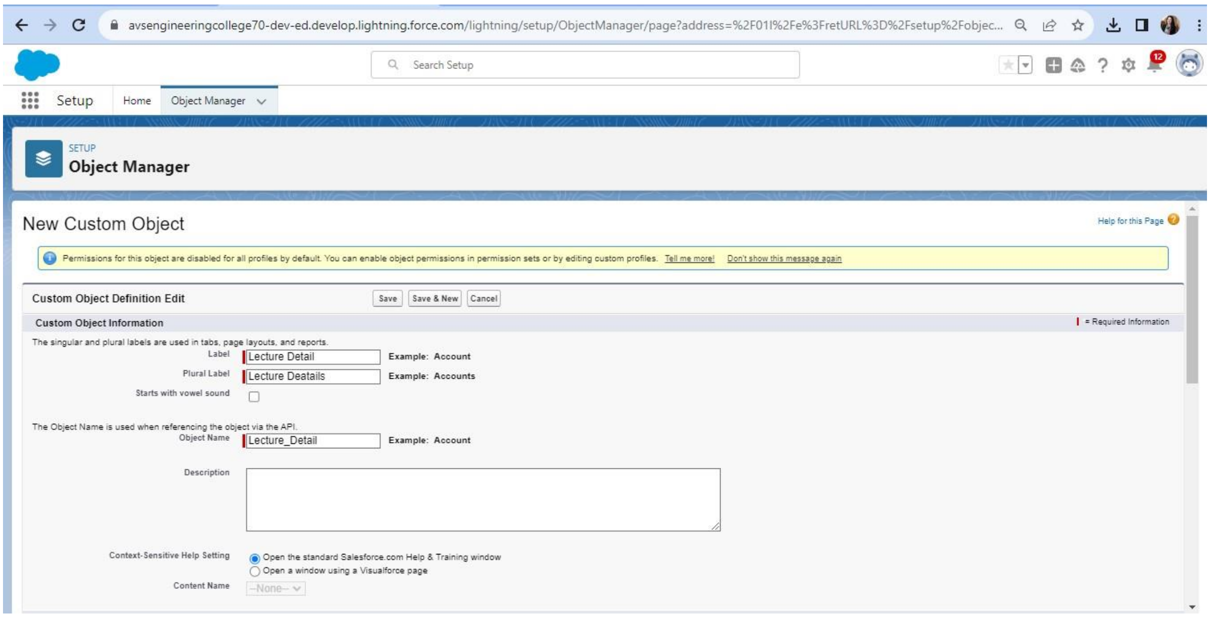
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Center
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
SETUP
Home
Create
User
Multiple Users
Custom Object
Custom Tab
Email Template
Flow
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT
Manager12
Permission Set


Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Semester
Example: Account
Plural Label
Semesters
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Semester
Example: Account
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
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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Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Help for this Page
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
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Lecture Detail
Example: Account
Plural Label
Lecture Deatails
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Lecture_Detail
Example: Account
Description
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Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
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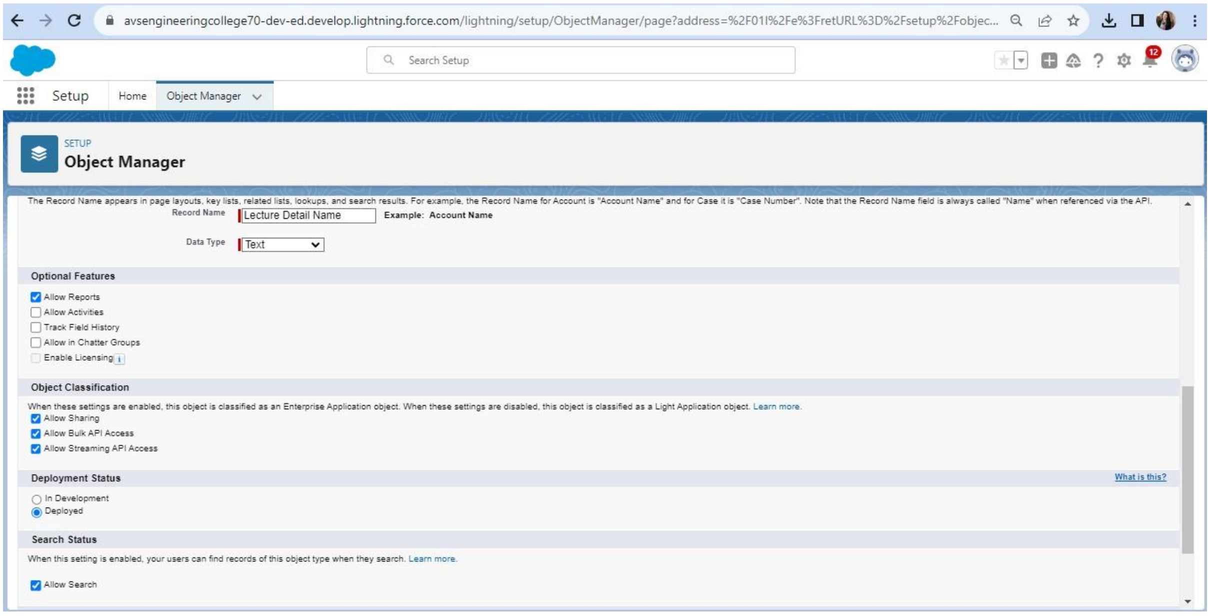
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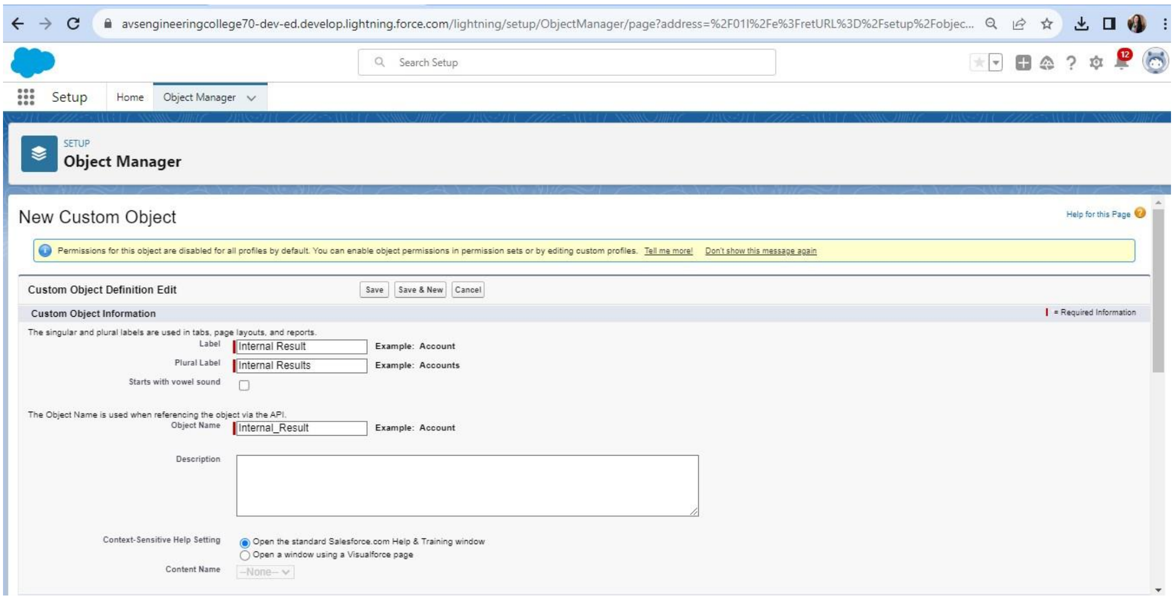
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Lecture Detail Name
Example: Account Name
Data Type
Text
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
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search


Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
Save
Save & New
Cancel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Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Help for this Page
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
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Internal Result
Example: Account
Plural Label
Internal Results
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
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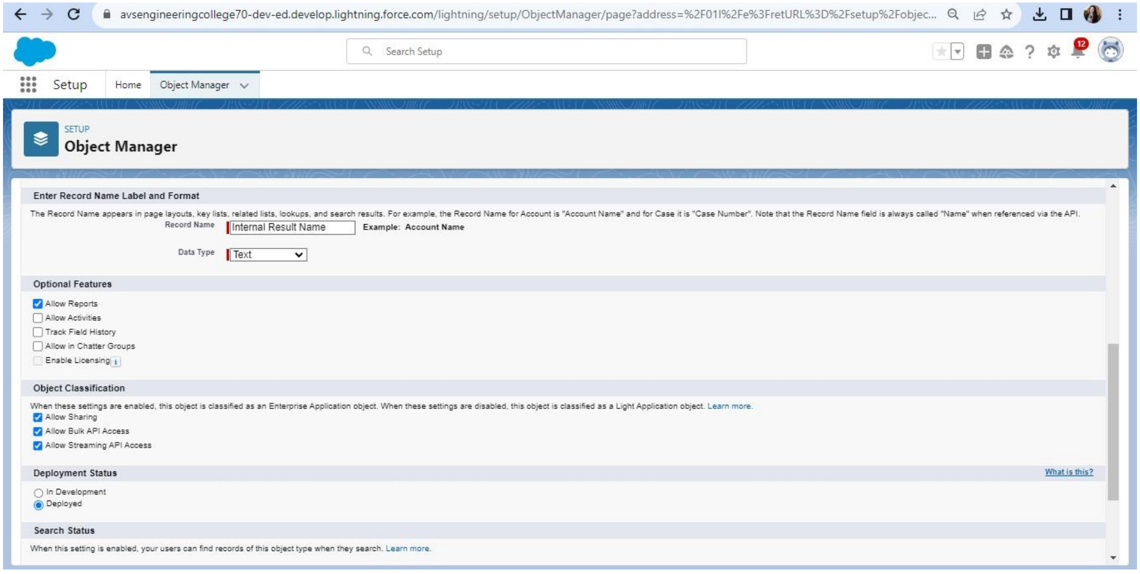
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Object Manager
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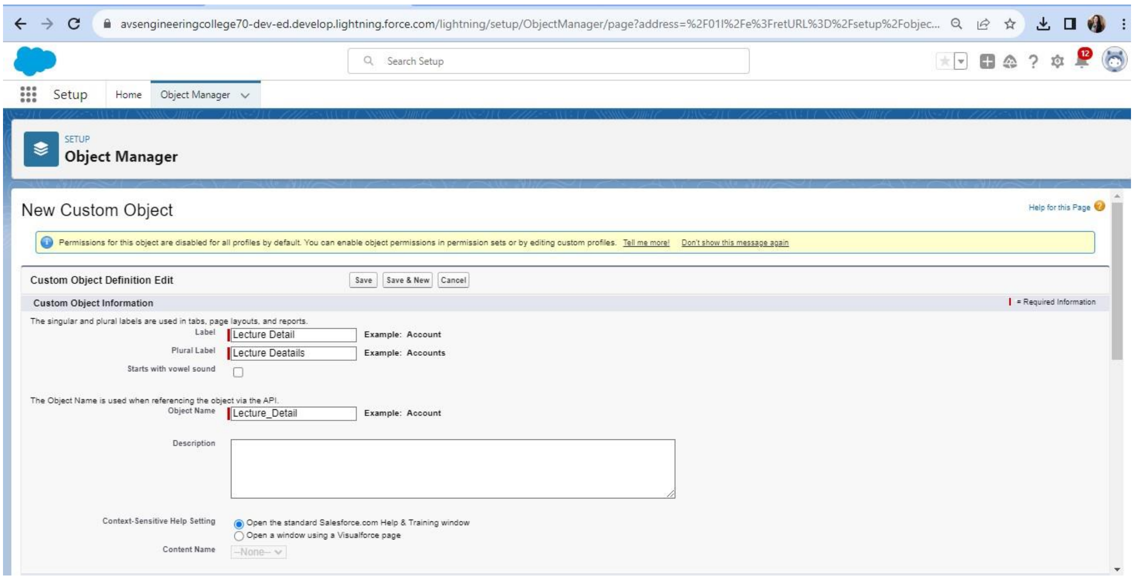
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.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Description
Context-Sensitive Help Setting
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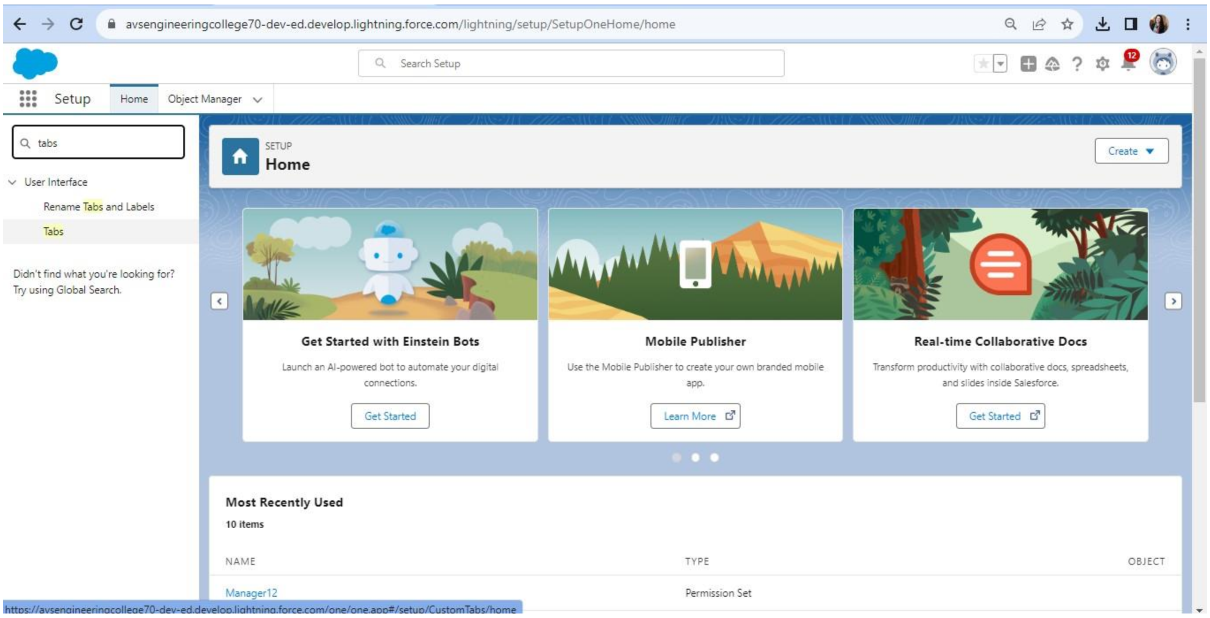
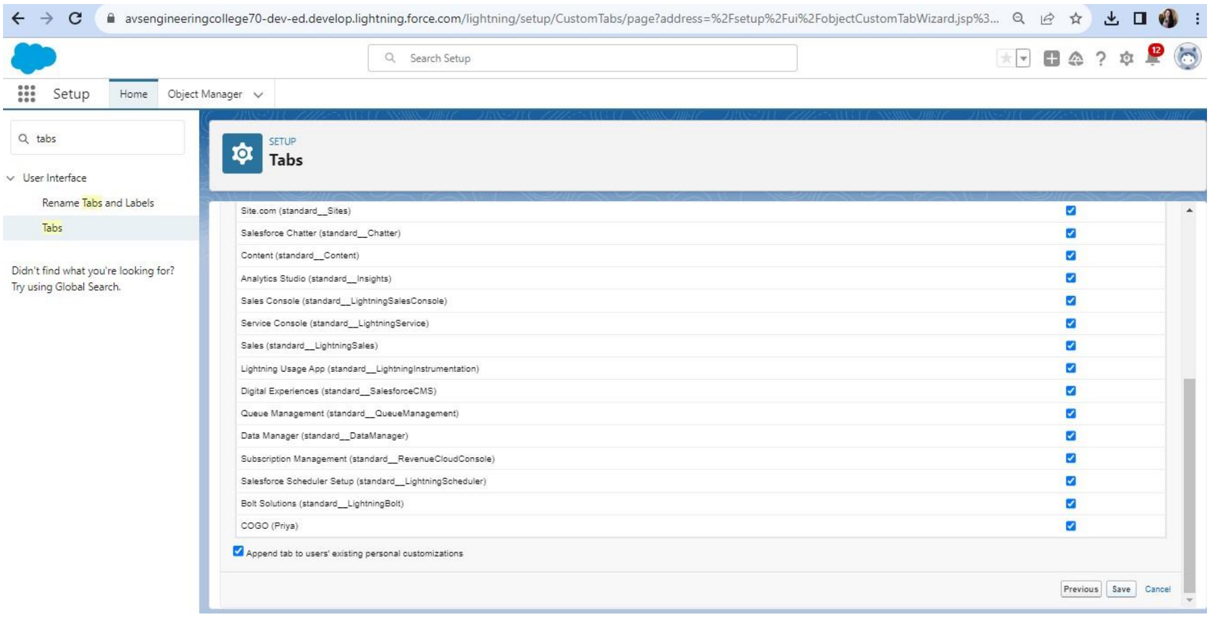
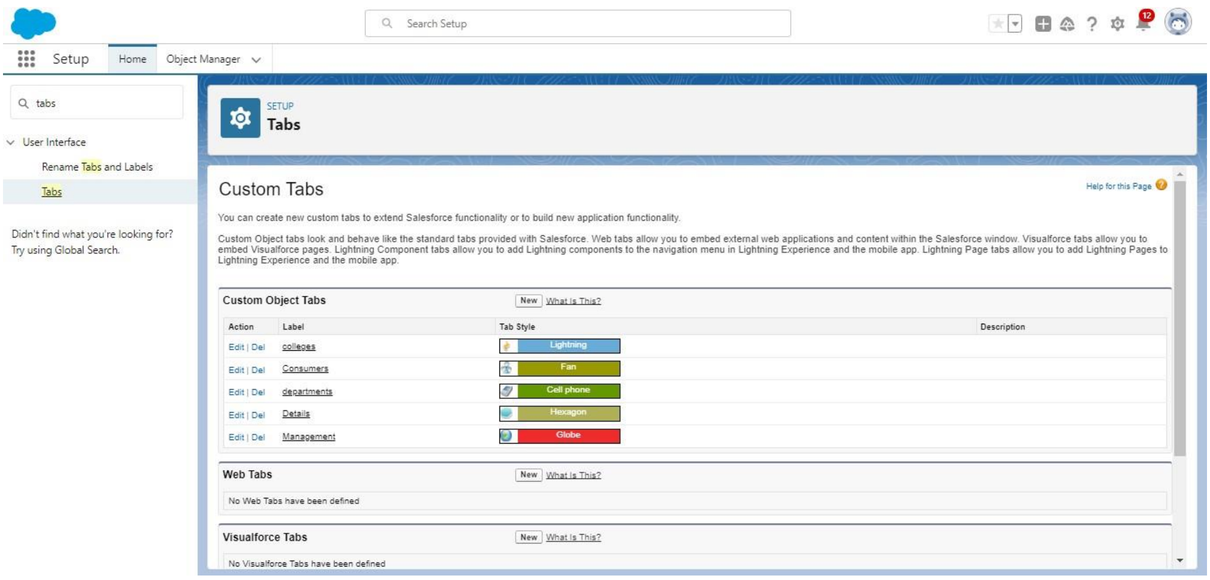
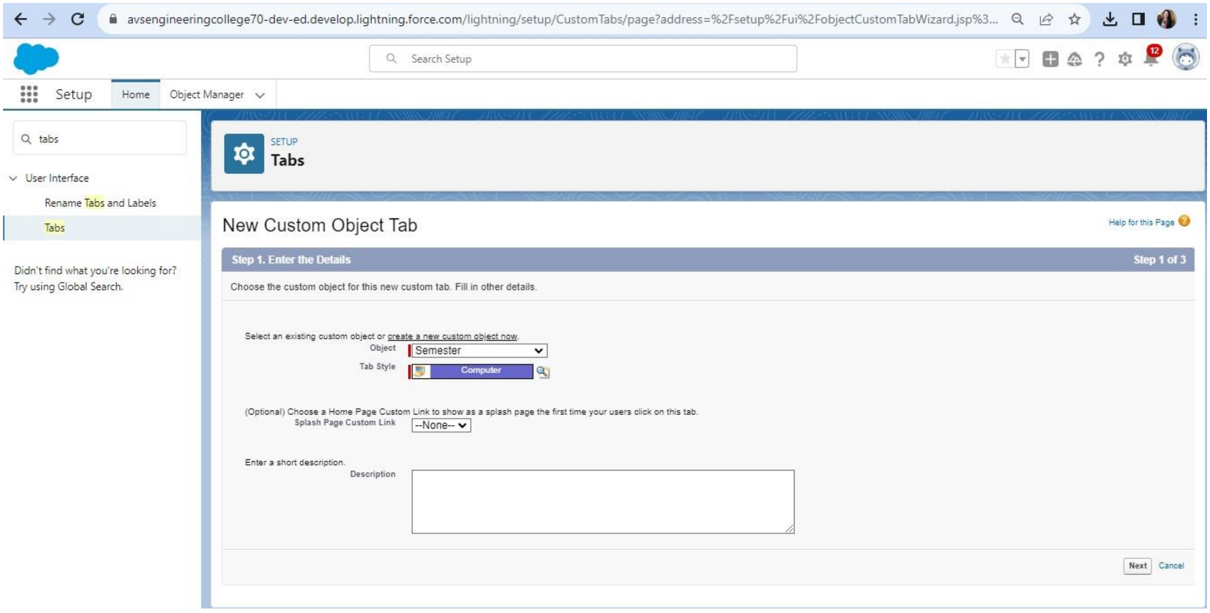
Open a window using a Visualforce page
Content Name
--None--

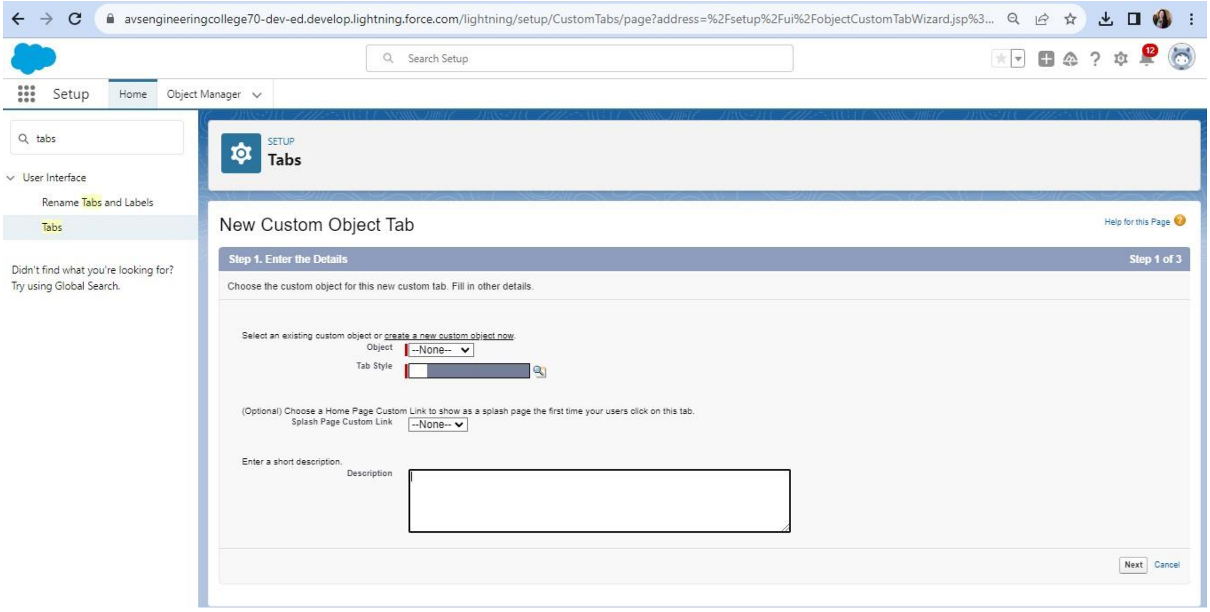
2.2.1.TABS:

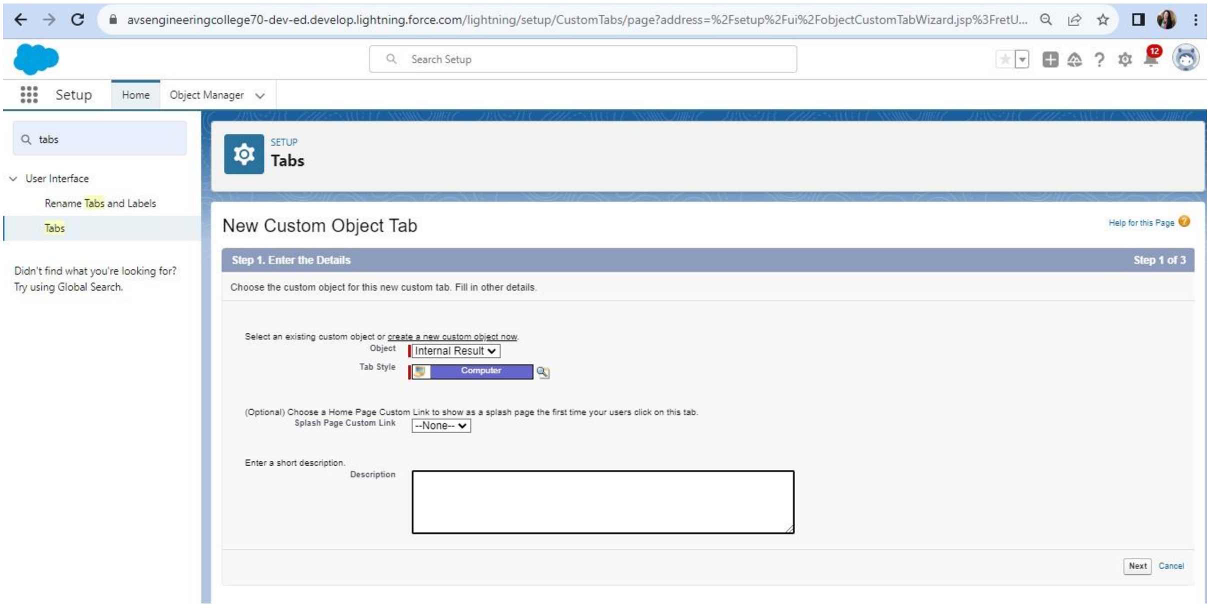

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT
Manager12
Permission Set
https://avsengineeringcollege70-dev-ed.develop.lightning.force.com/one/one.app#/setup/CustomTabs/home

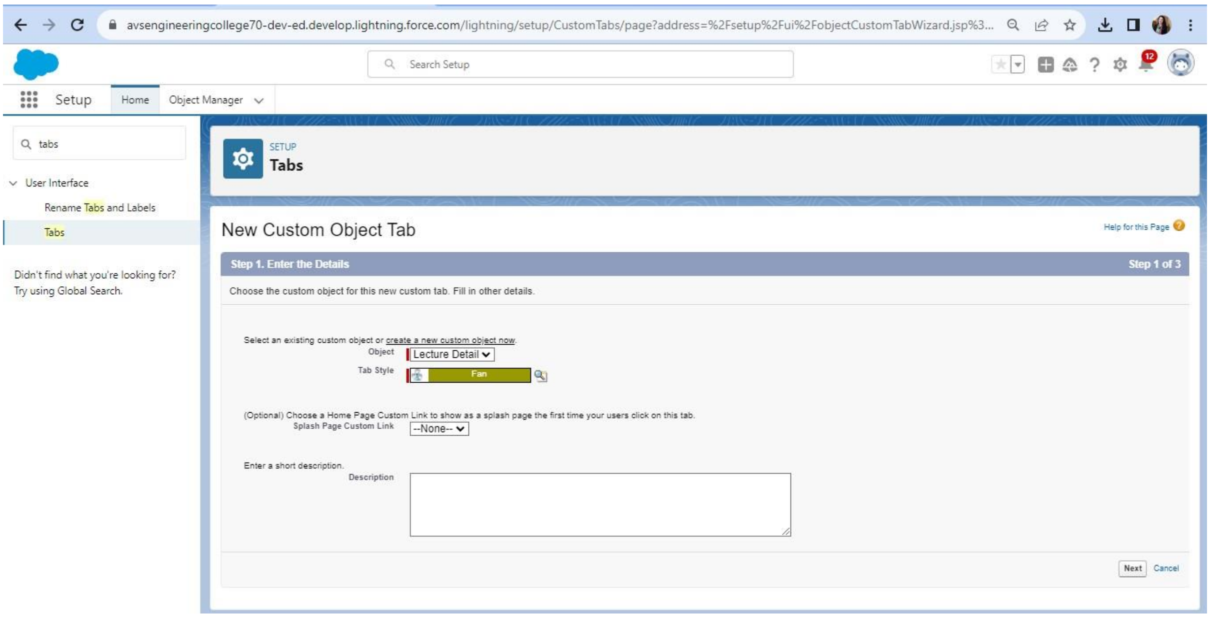

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)
Queue Management (standard__QueueManagement)
Data Manager (standard__DataManager)
Subscription Management (standard__RevenueCloudConsole)
Salesforce Scheduler Setup (standard__LightningScheduler)
Bolt Solutions (standard__LightningBolt)
COGO (Priya)
Append tab to users' existing personal customizations
Previous
Save
Cancel

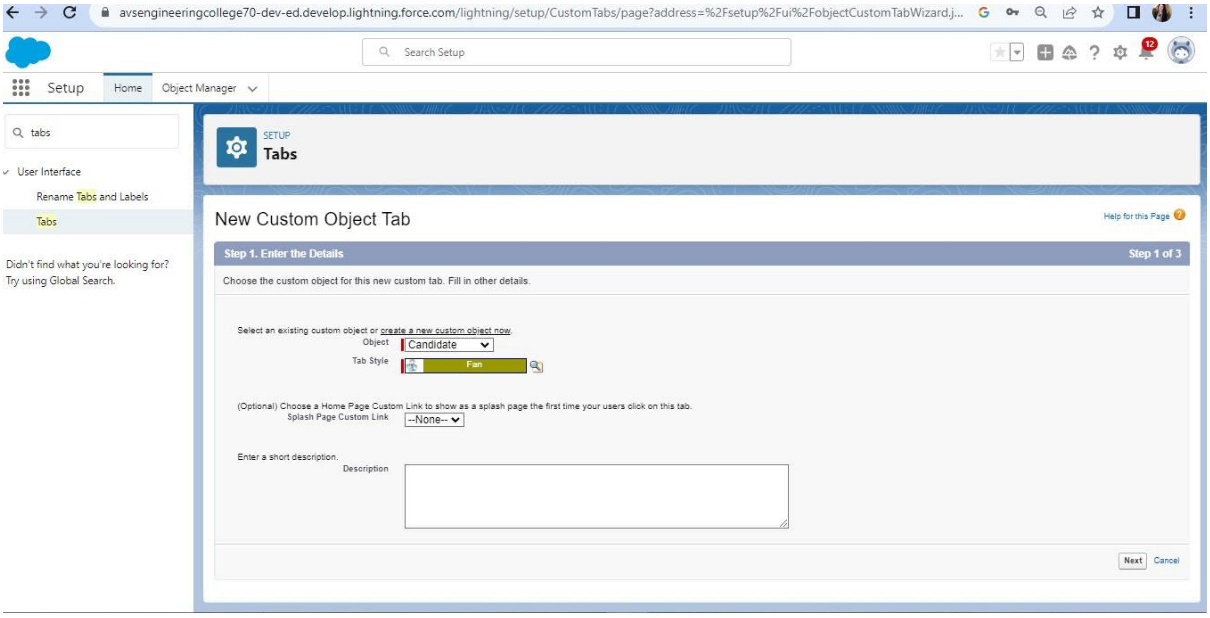


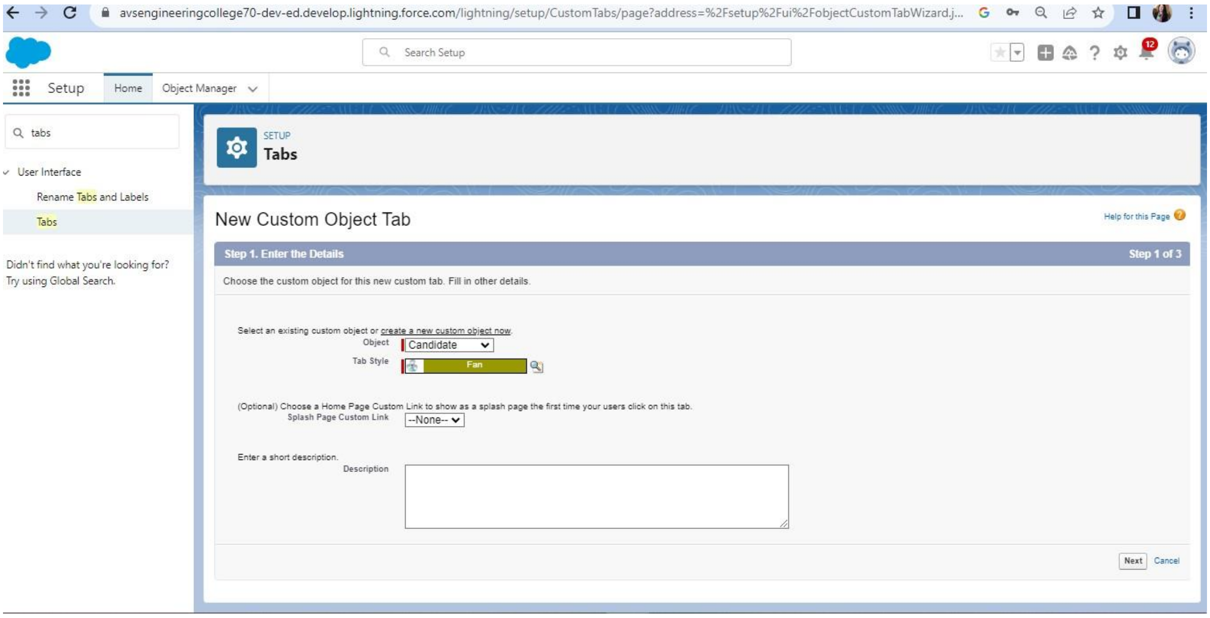


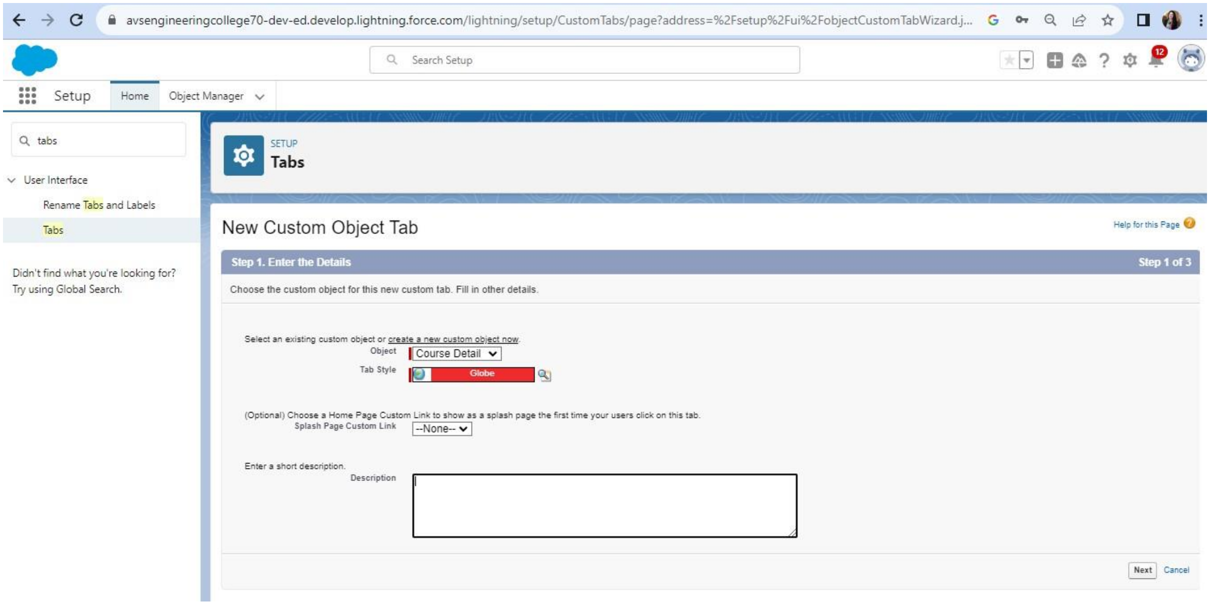

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
--None--
Tab Style
(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


avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretU...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Internal Result
Tab Style
Computer
(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

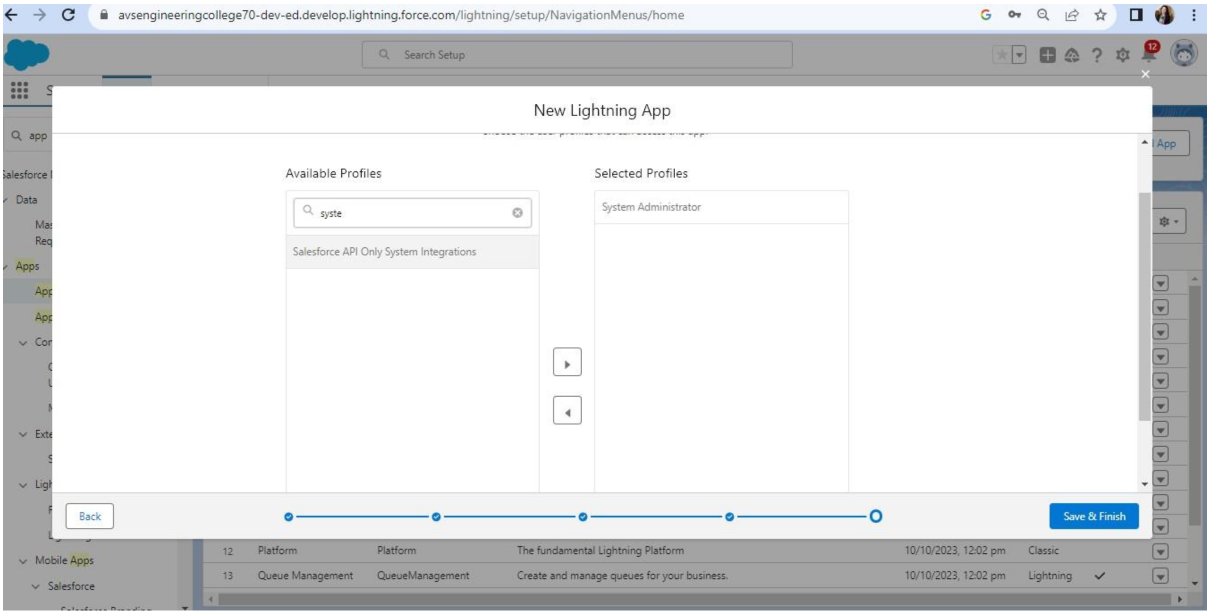

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Lecture Detail
Tab Style
Fan
(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

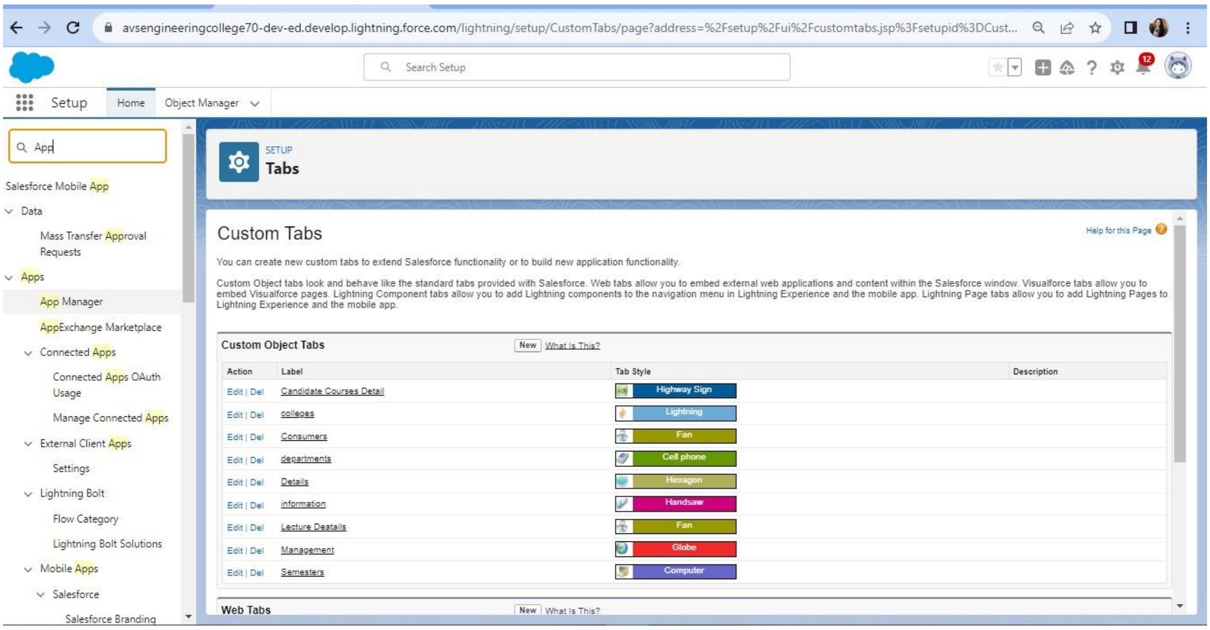

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Candidate
Tab Style
Fan
(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

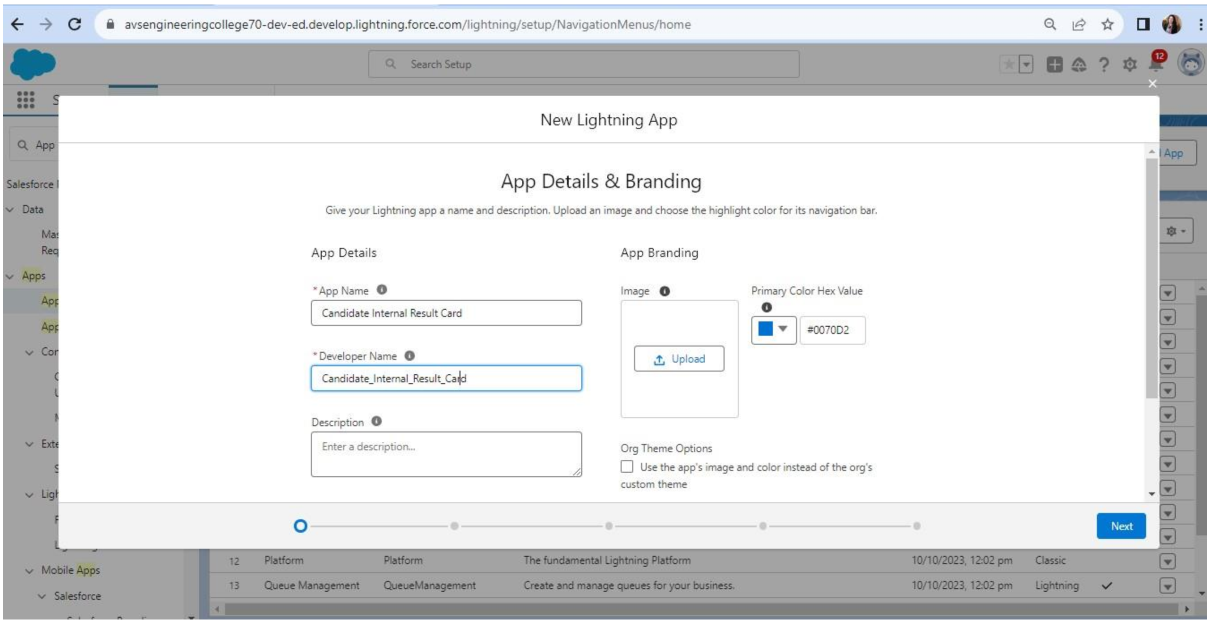

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Candidate
Tab Style
Fan
(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

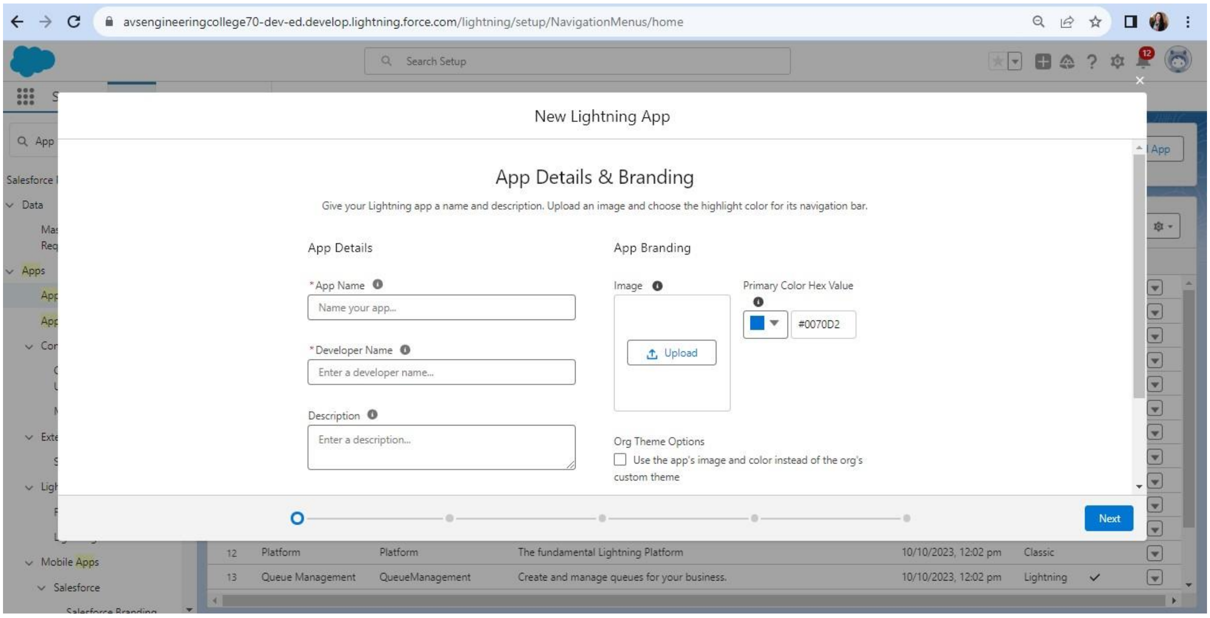

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Course Detail
Tab Style
Globe
(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

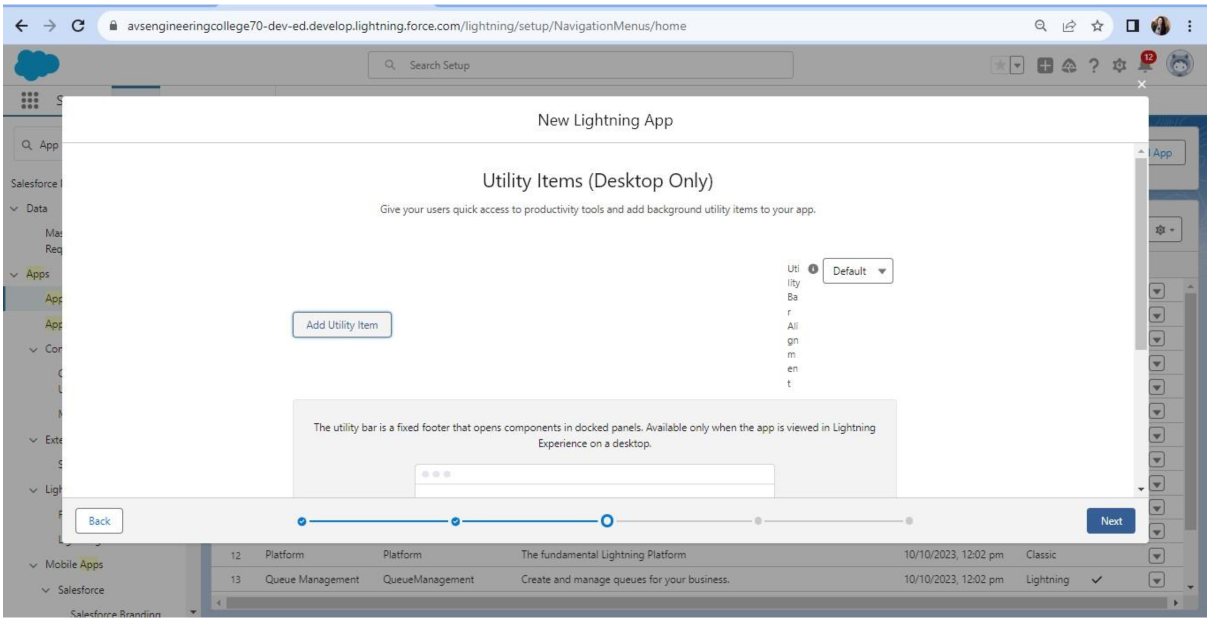
2.3.LIGHTNING APP:

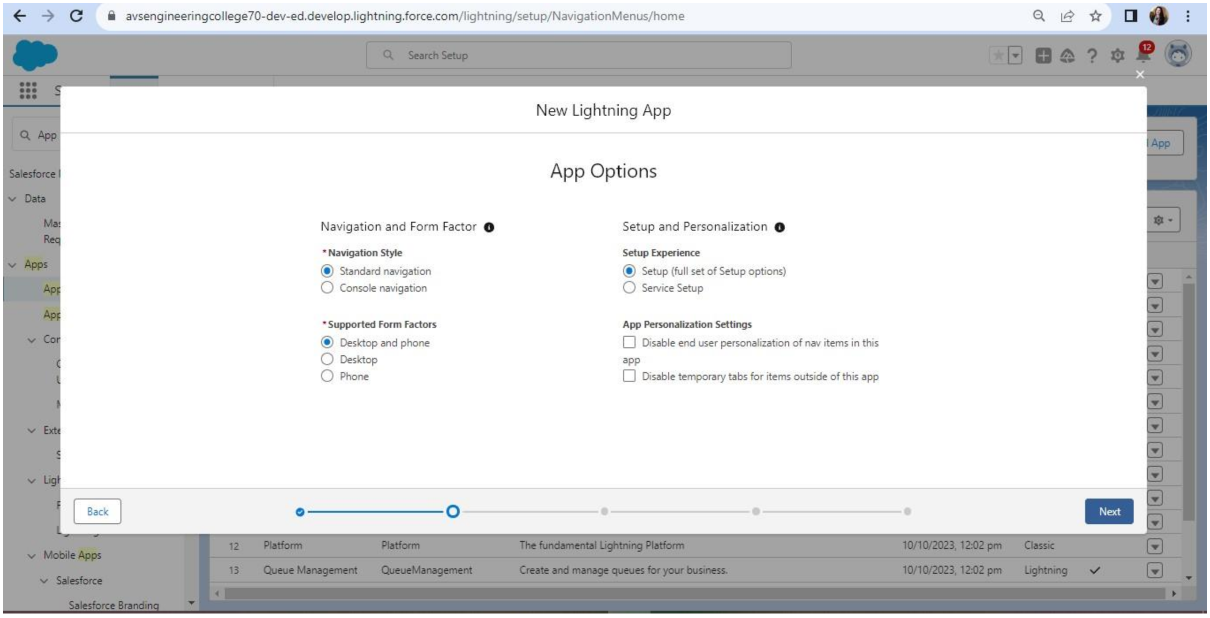


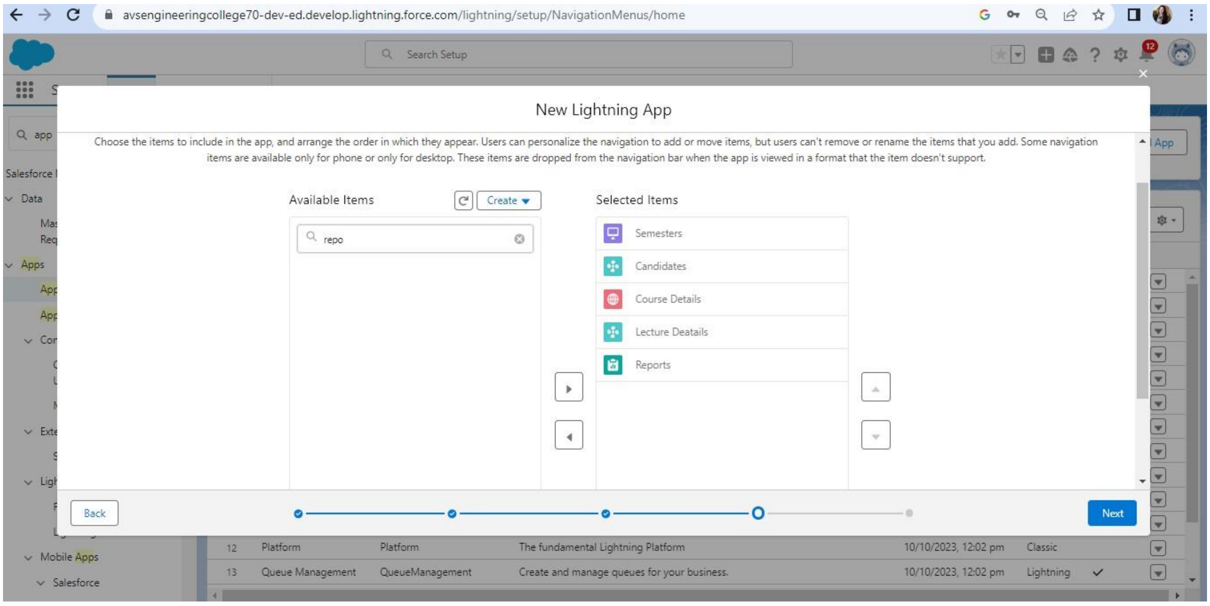


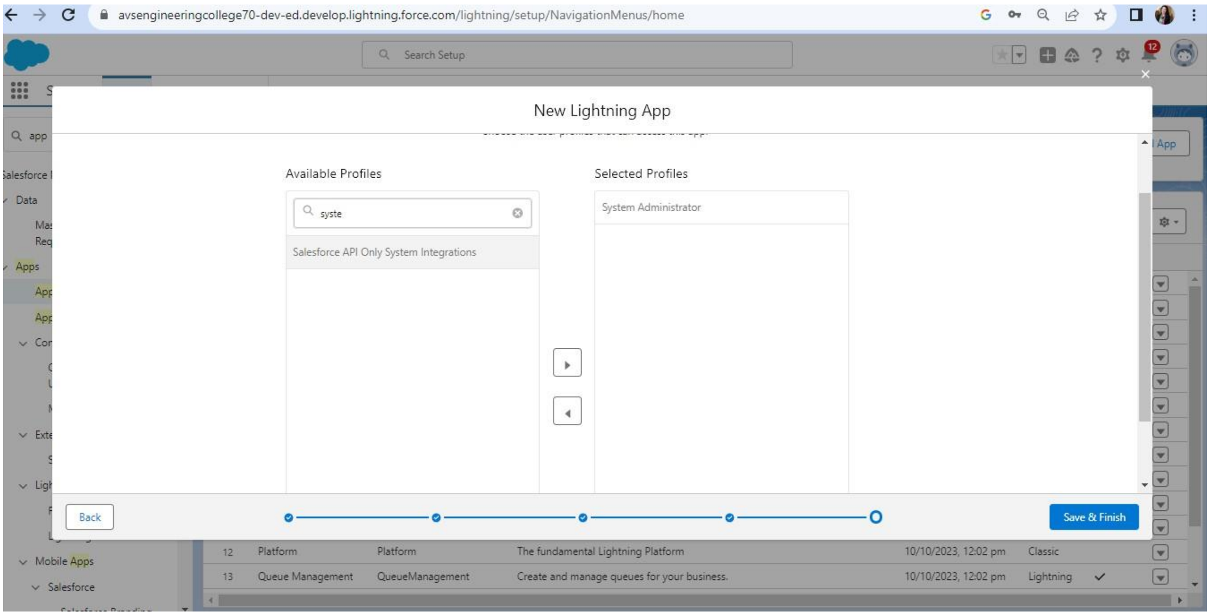

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
* App Name
Candidate Internal Result Card
* Developer Name
Candidate_Internal_Result_Card
Description
Enter a description...
App Branding
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
Next
12 Platform Platform The fundamental Lightning Platform 10/10/2023, 12:02 pm Classic
13 Queue Management QueueManagement Create and manage queues for your business. 10/10/2023, 12:02 pm Lightning
Mobile Apps
Salesforce


avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
* App Name
Name your app...
* Developer Name
Enter a developer name...
Description
Enter a description...
App Branding
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
Next
12 Platform Platform The fundamental Lightning Platform 10/10/2023, 12:02 pm Classic
13 Queue Management QueueManagement Create and manage queues for your business. 10/10/2023, 12:02 pm Lightning
Mobile Apps
Salesforce

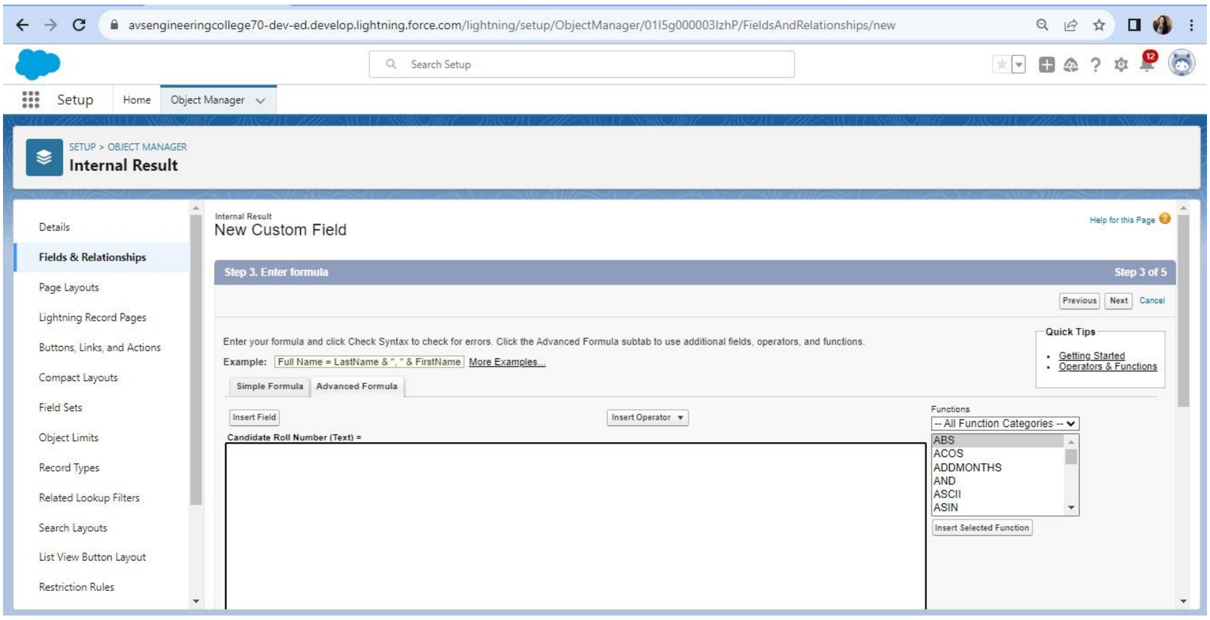

New Lightning App
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
Add Utility Item
Default
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
Back
Next

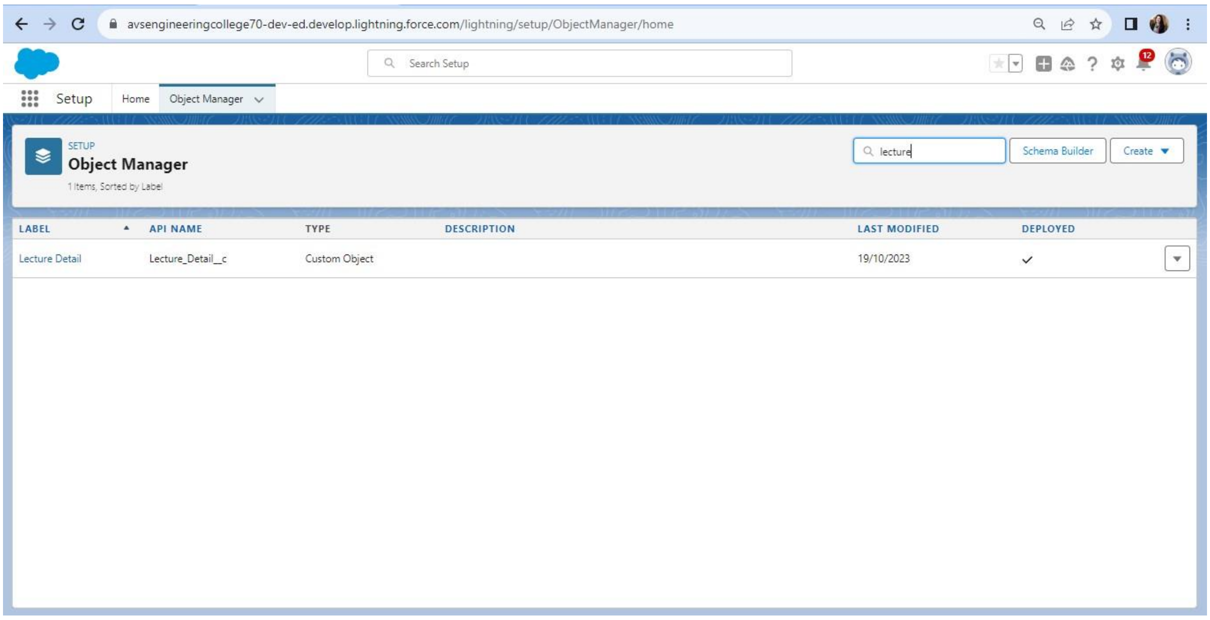

New Lightning App
App Options
Navigation and Form Factor
Navigation Style
Standard navigation
Console navigation
Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
App Personalization Settings
Disable end user personalization of nav items in this app
Disable temporary tabs for items outside of this app
Back
Next

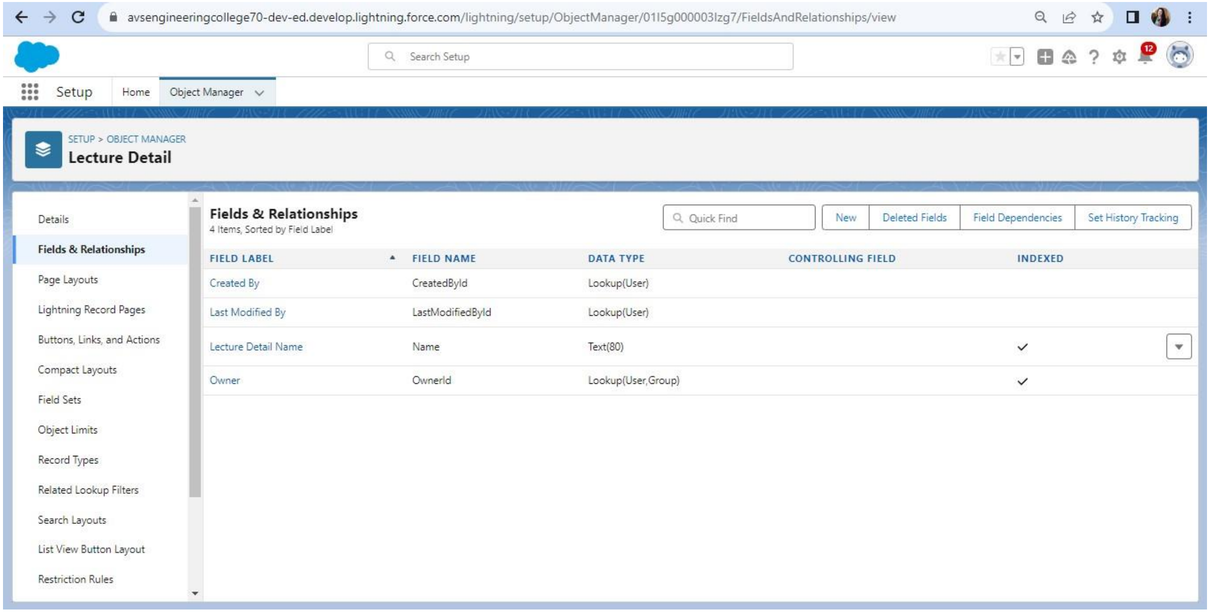

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
repo
Selected Items
Semesters
Candidates
Course Details
Lecture Deatails
Reports
Back
Next

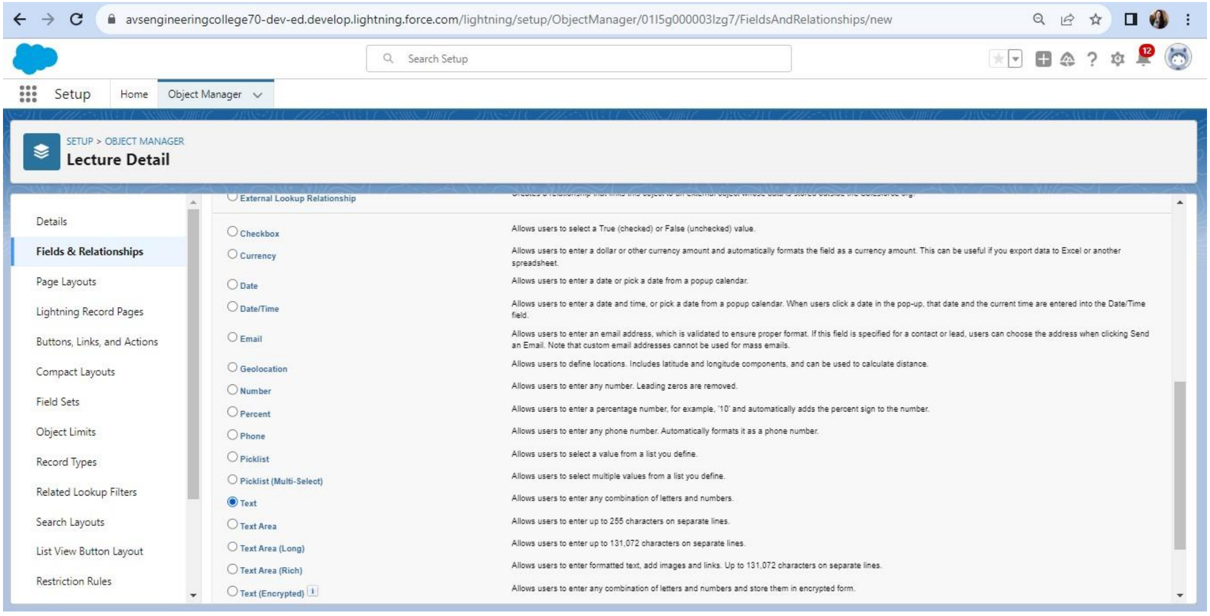

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
Available Profiles
syste
Salesforce API Only System Integrations
Selected Profiles
System Administrator
Back
Save & Finish

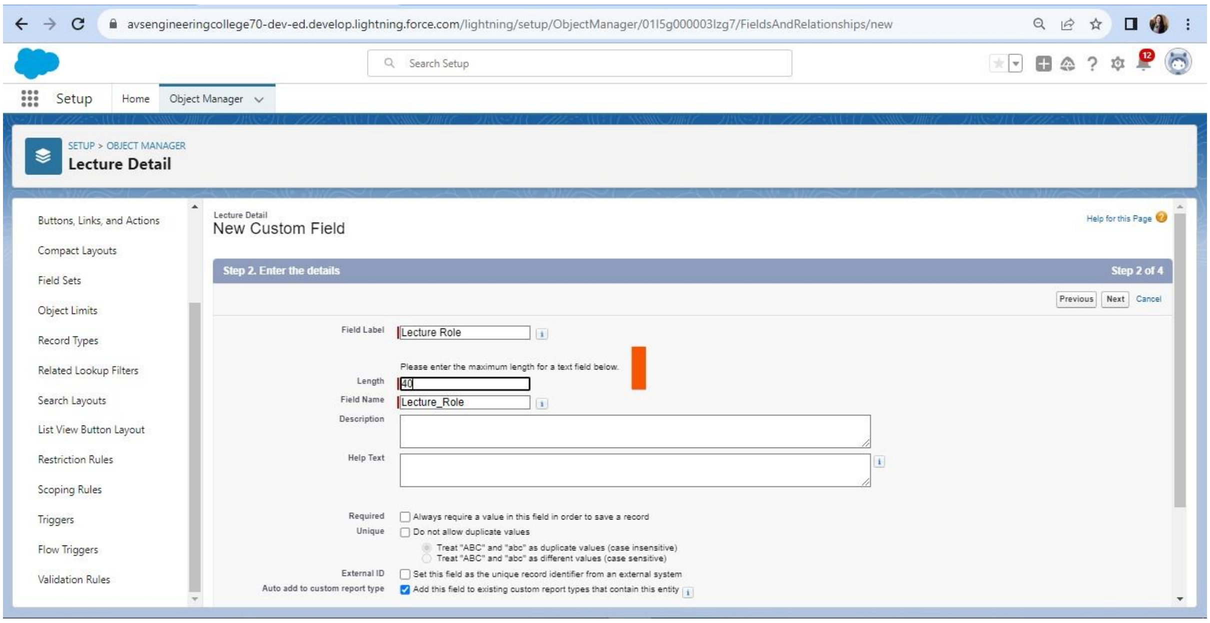
2.4.Field and Relationships:

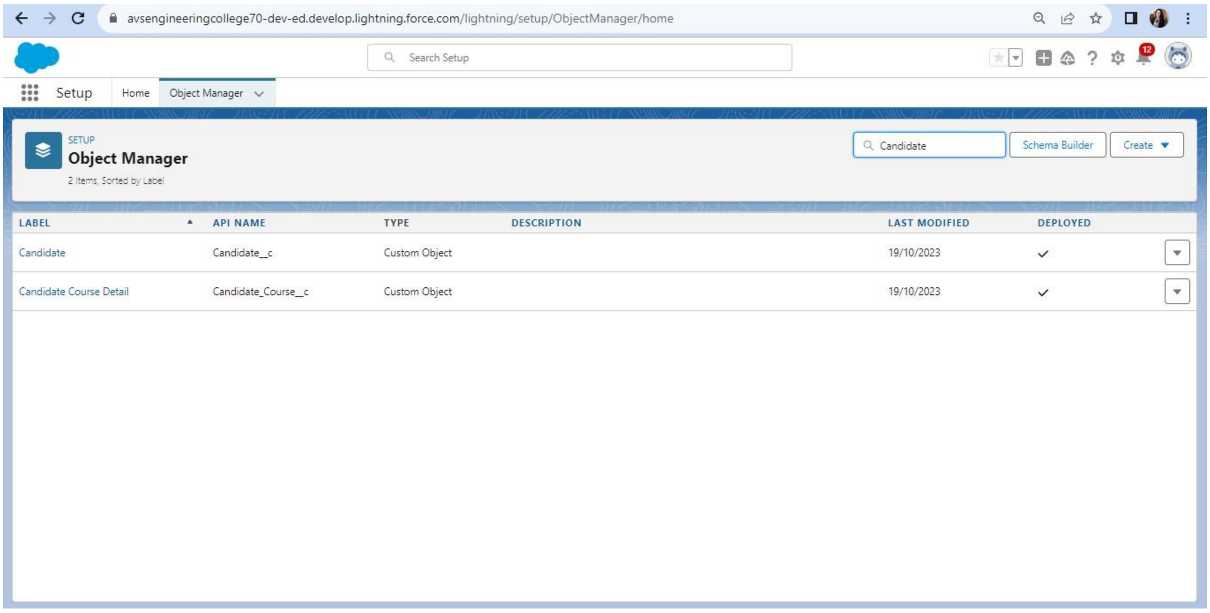


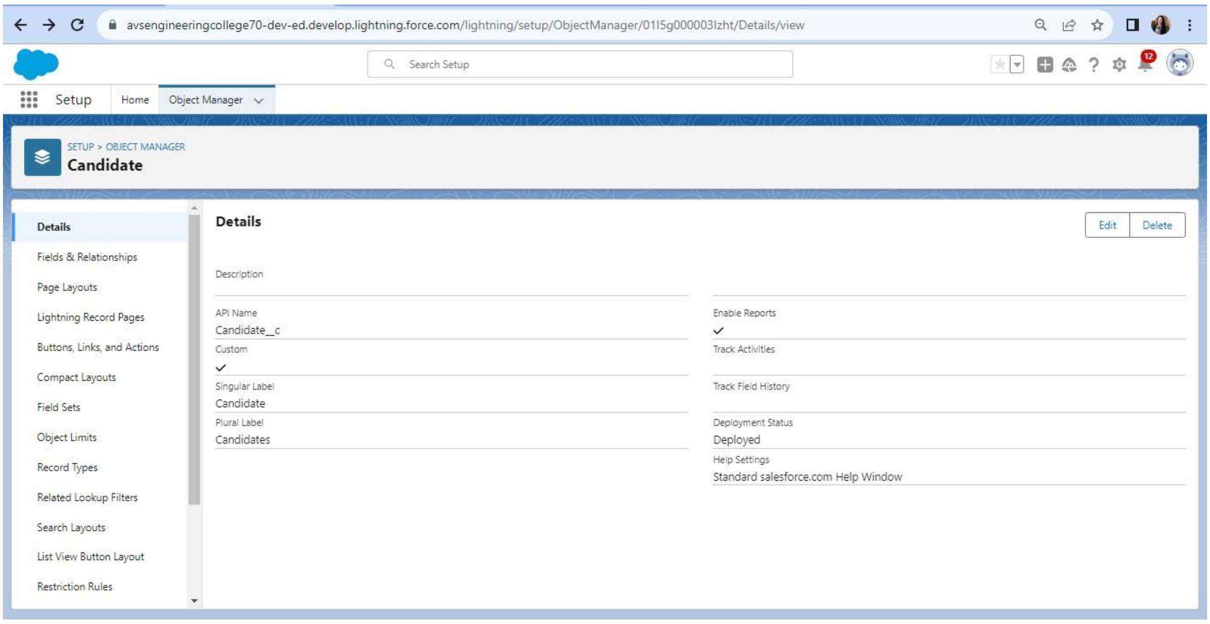


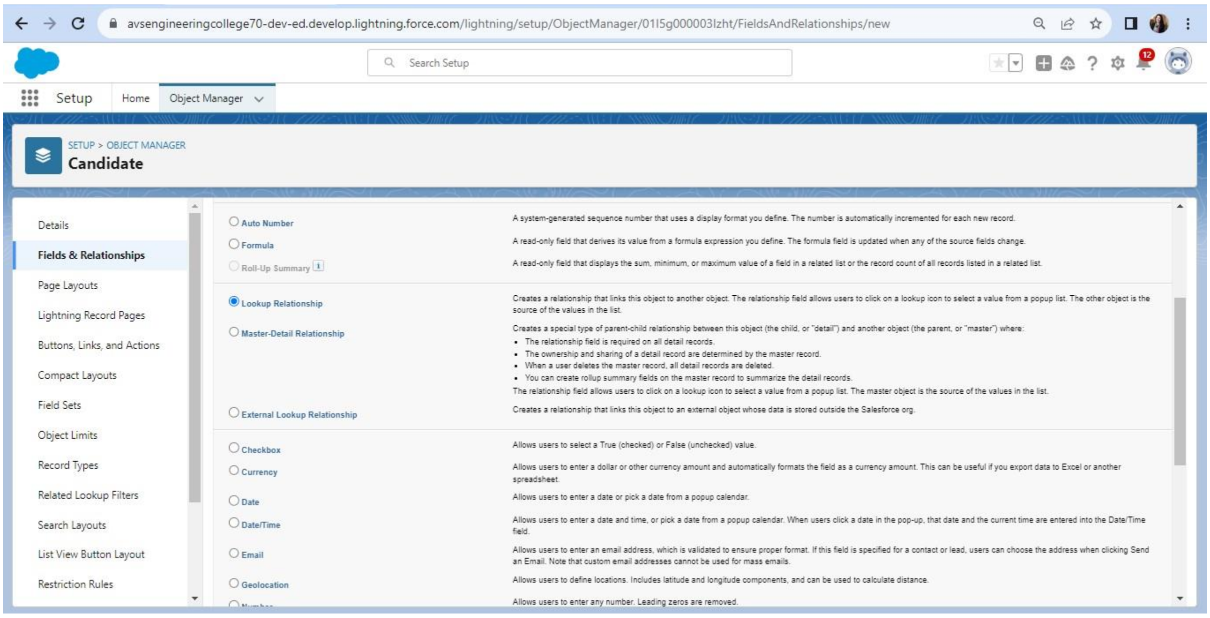


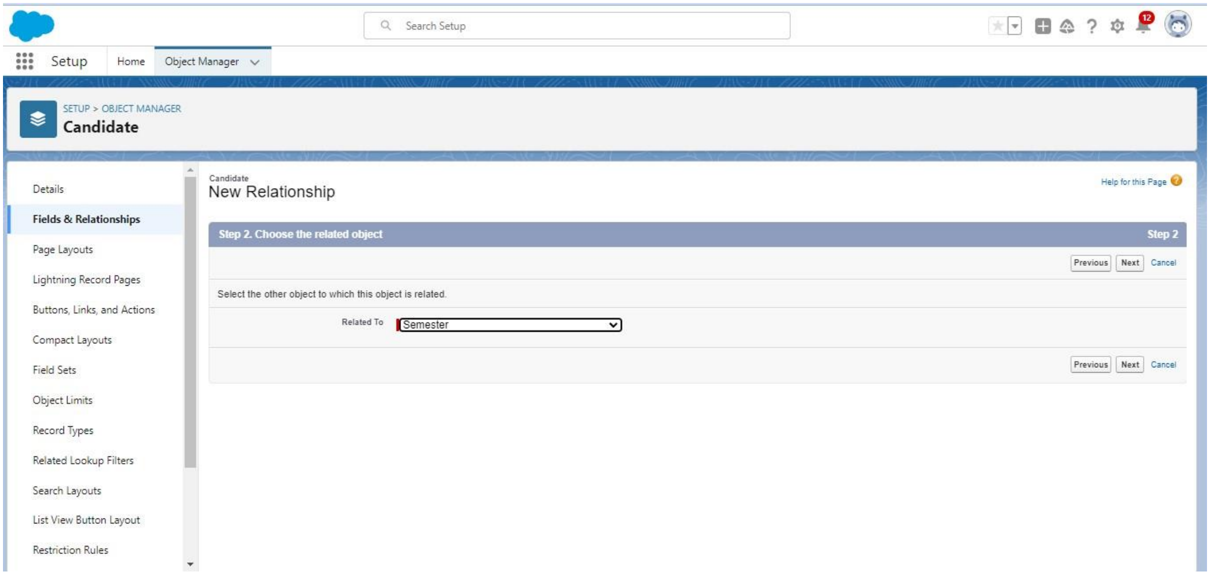


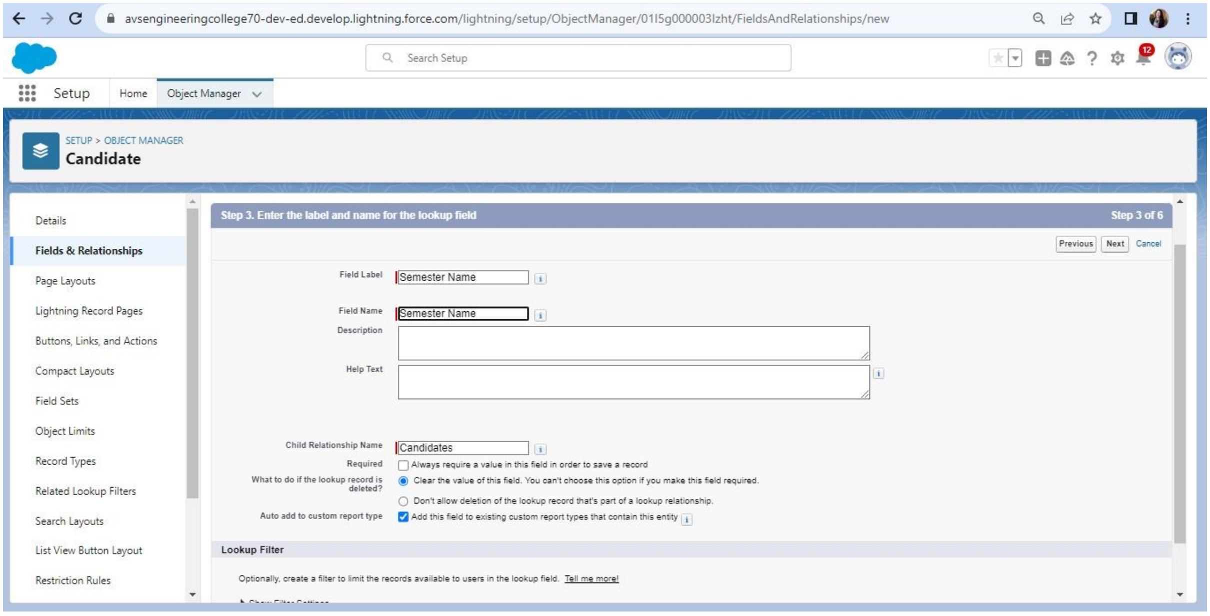


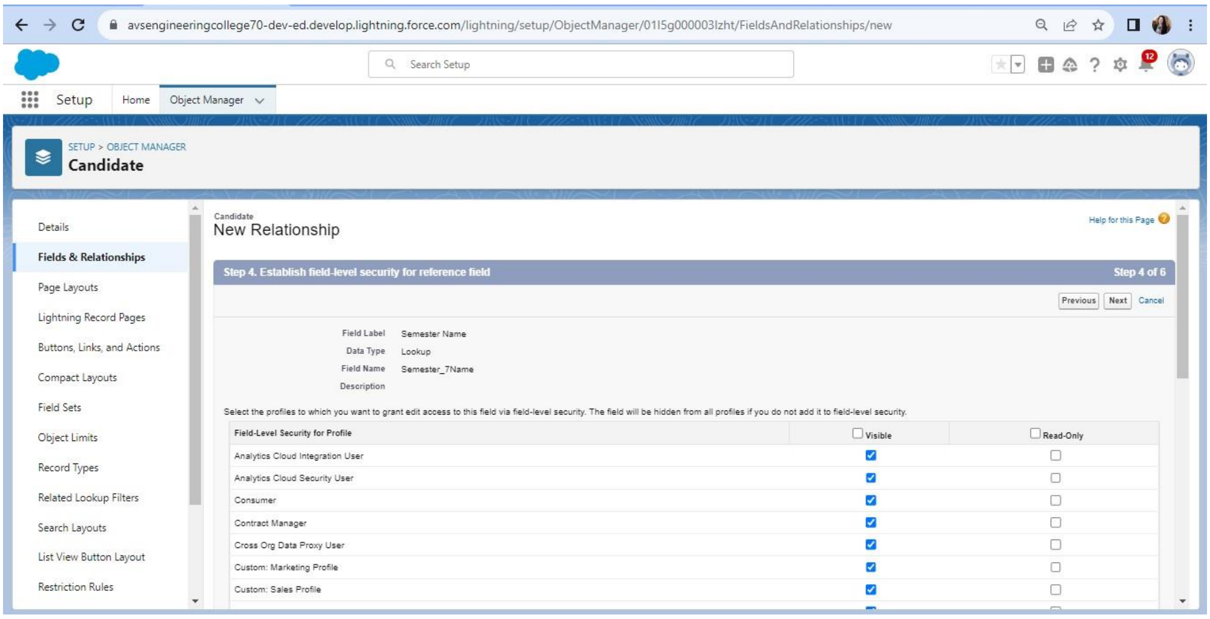


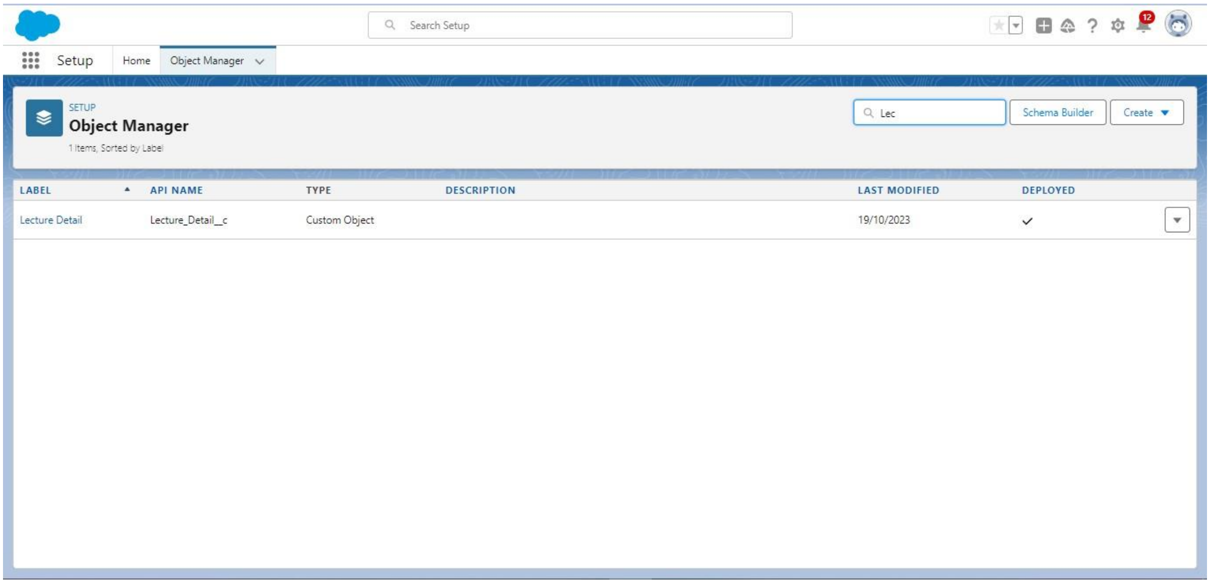


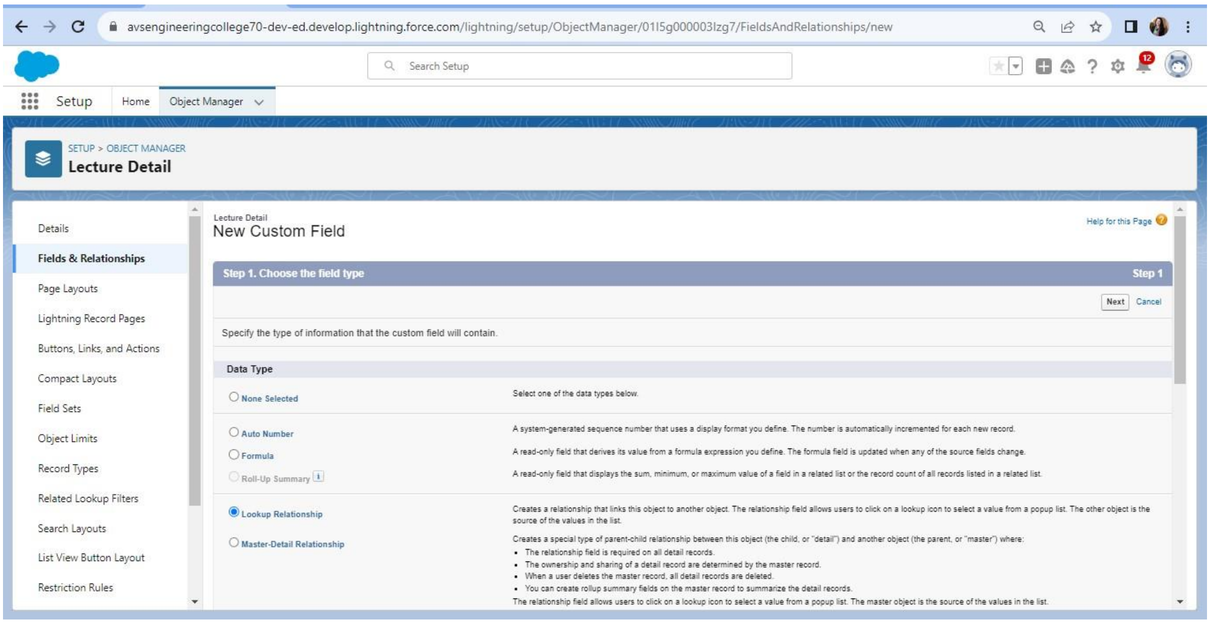


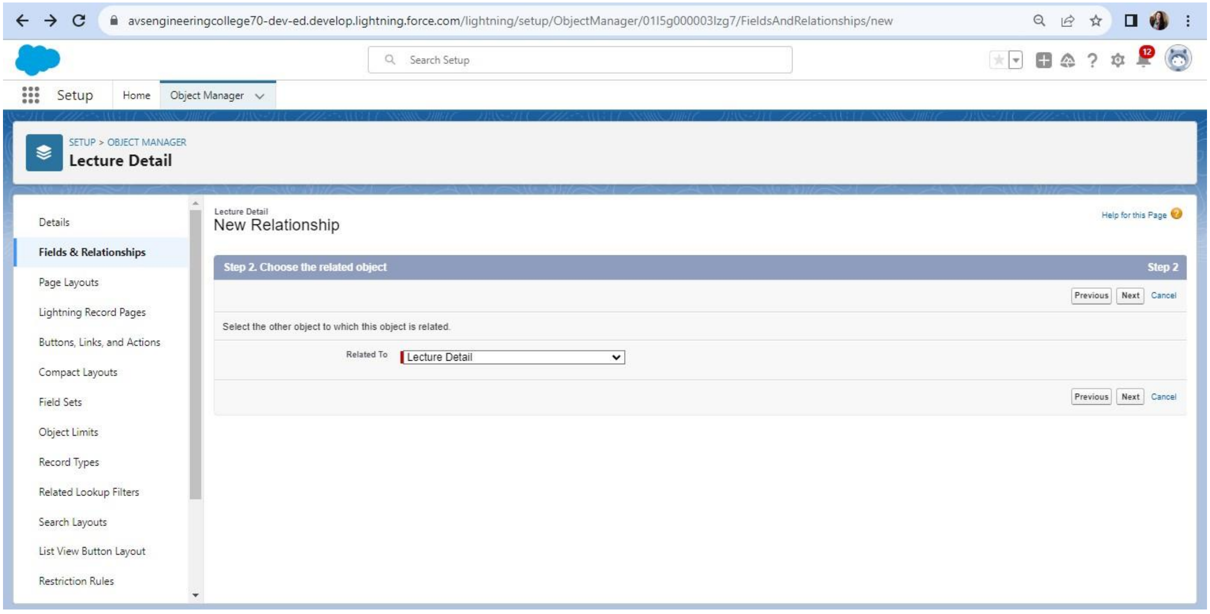

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Candidate
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Candidate
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Semester

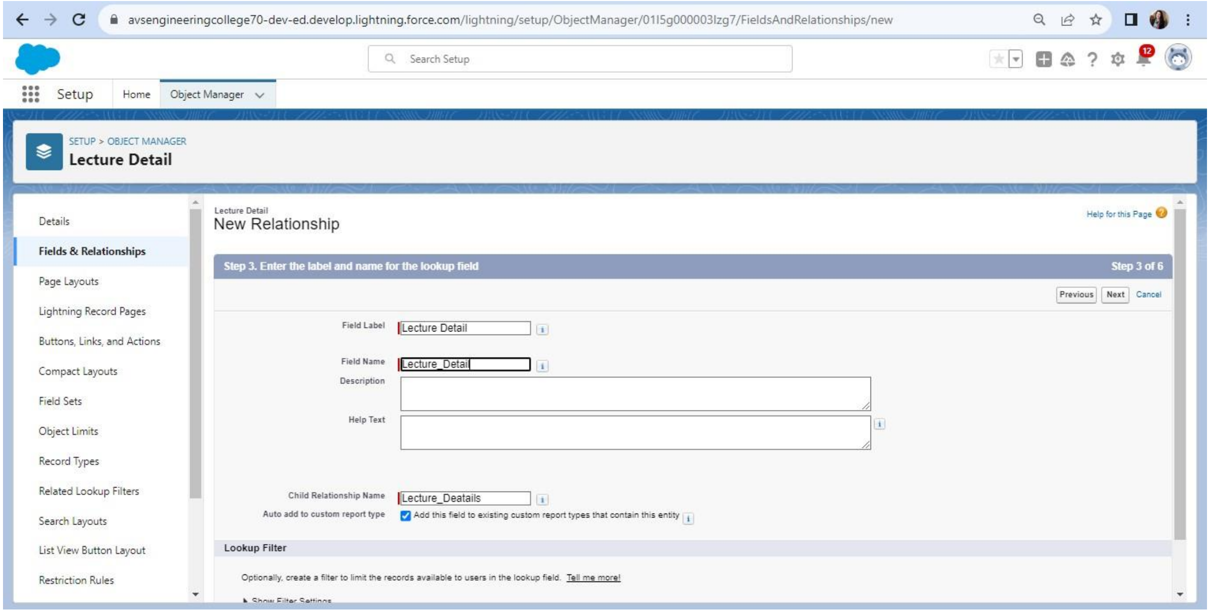

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003Izht/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Candidate
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Semester Name
Field Name
Semester Name
Description
Help Text
Child Relationship Name
Candidates
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!

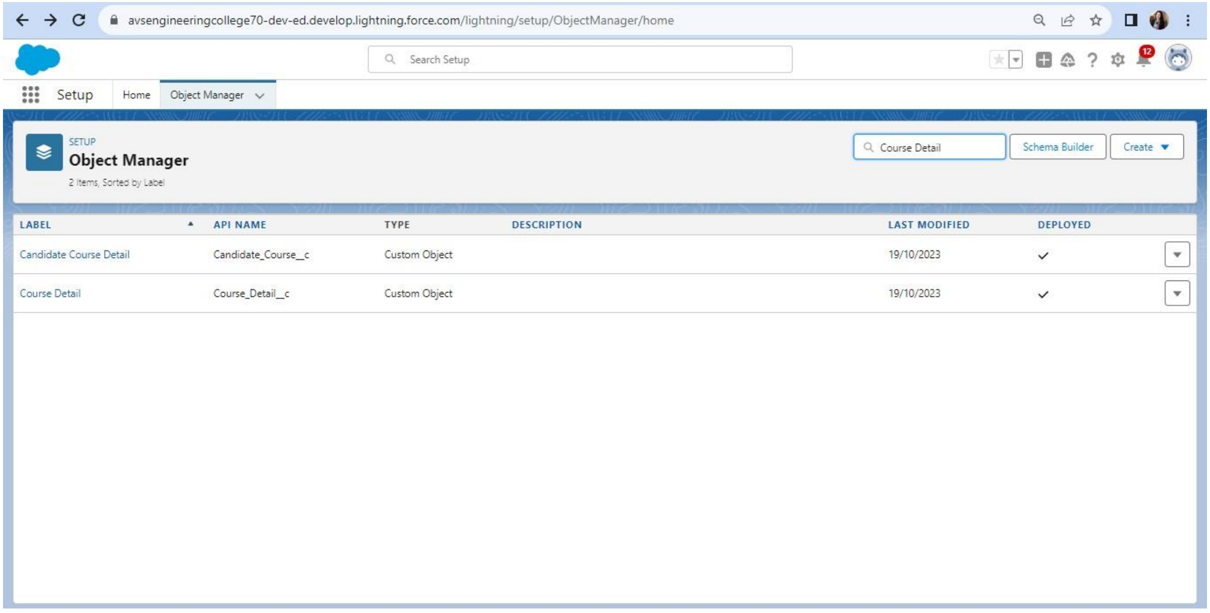


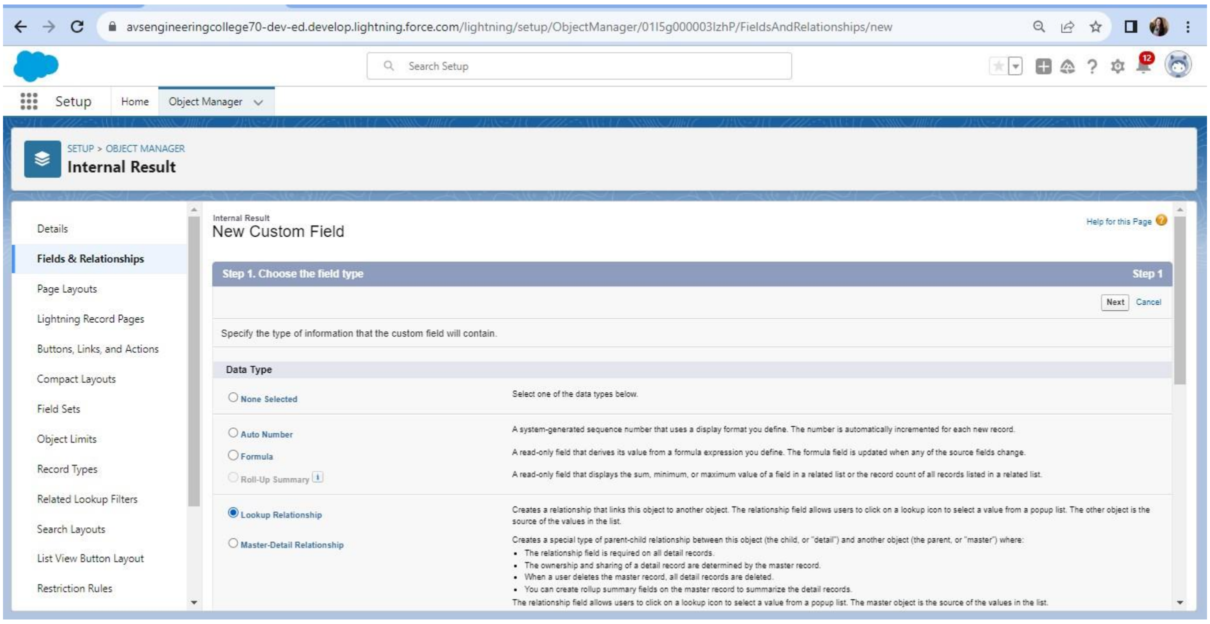


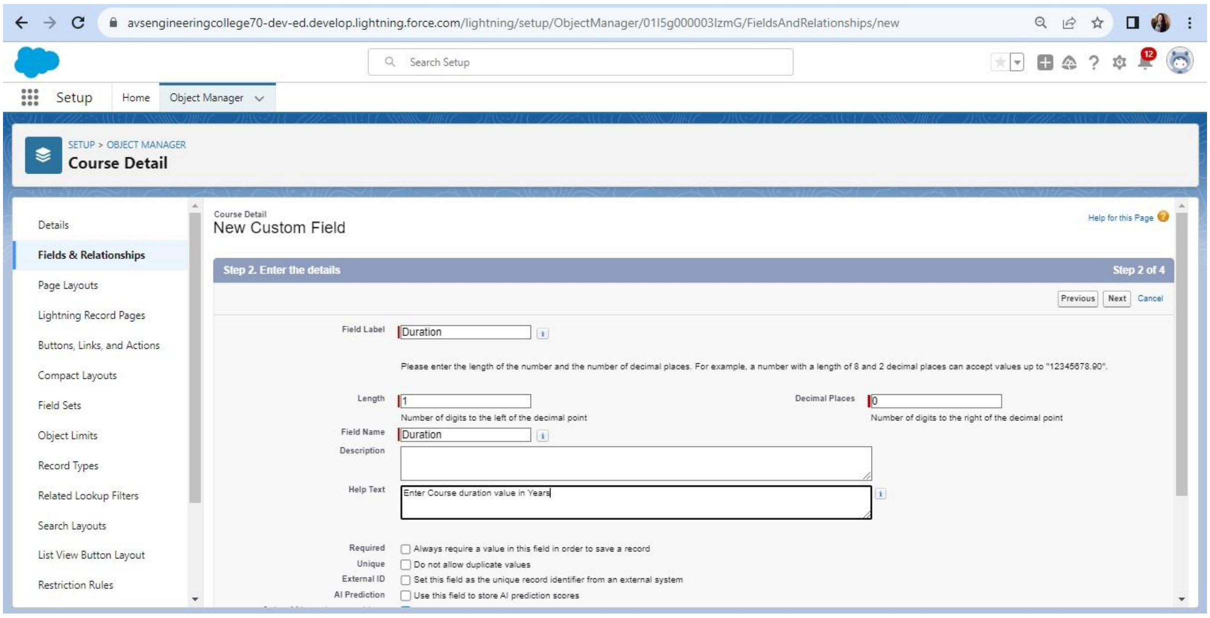


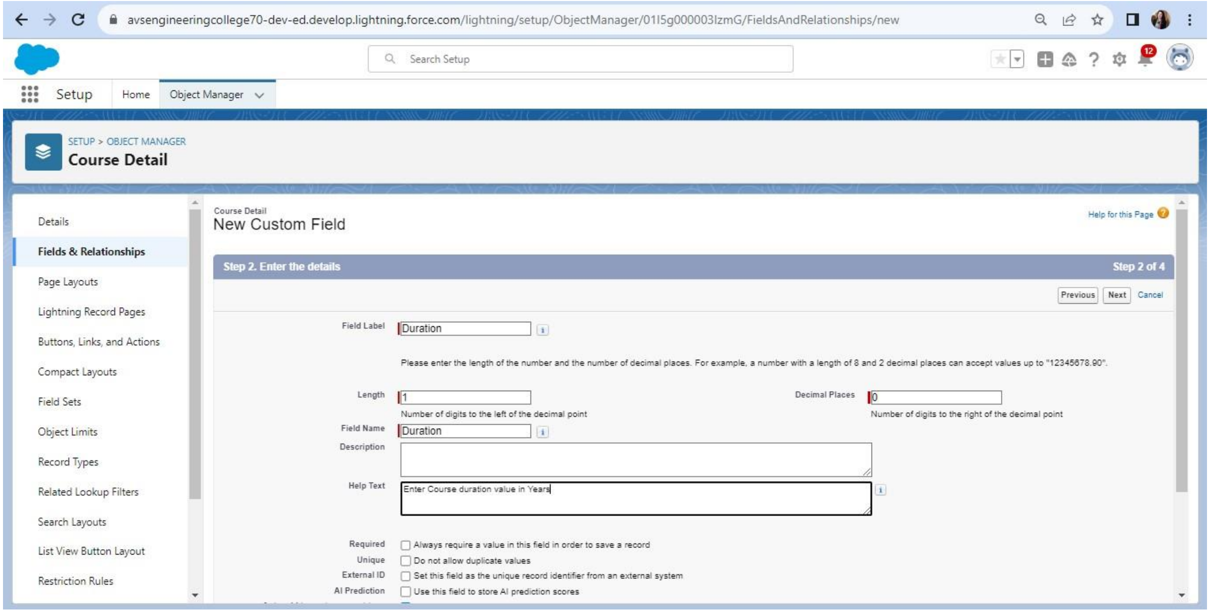


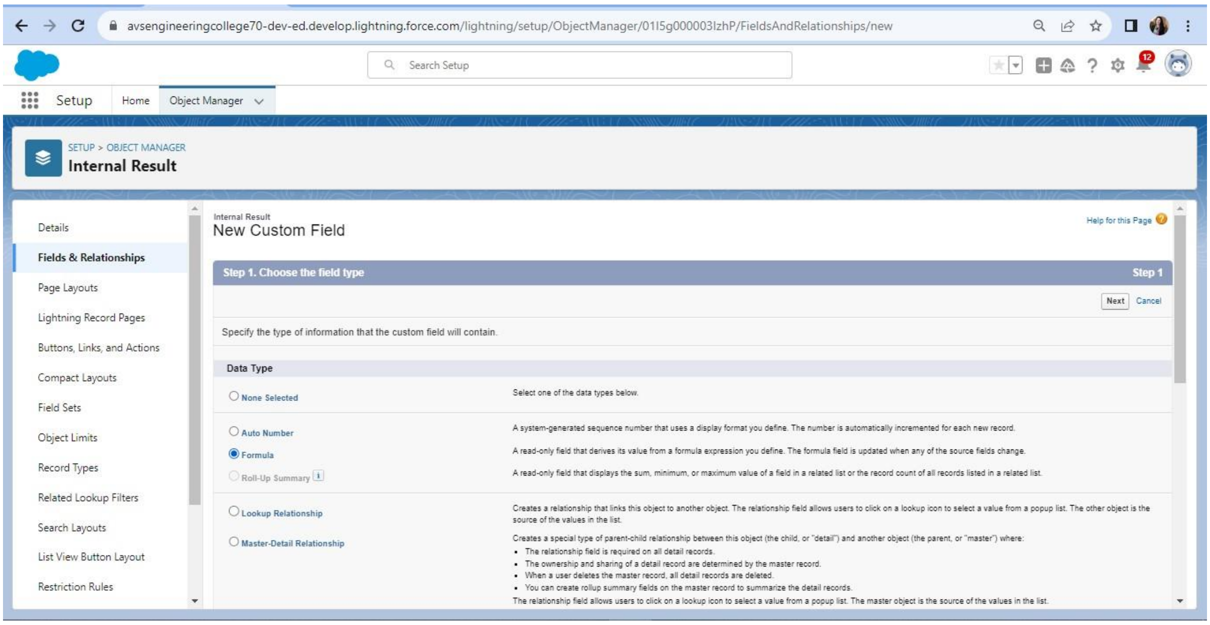

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003Izg7/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lecture Detail
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Lecture Detail
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Lecture Detail
Field Name
Lecture_Detail
Description
Help Text
Child Relationship Name
Lecture_Deatails
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!

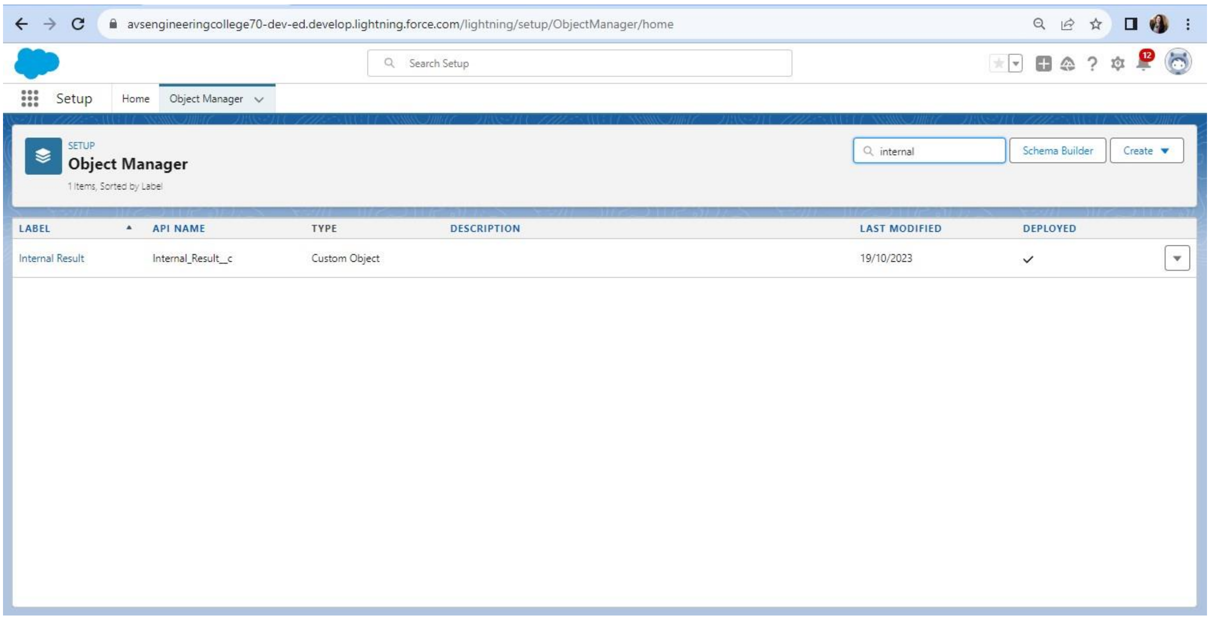

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
2 Items, Sorted by Label
Course Detail
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Candidate Course Detail
Candidate_Course__c
Custom Object
19/10/2023
Course Detail
Course_Detail__c
Custom Object
19/10/2023

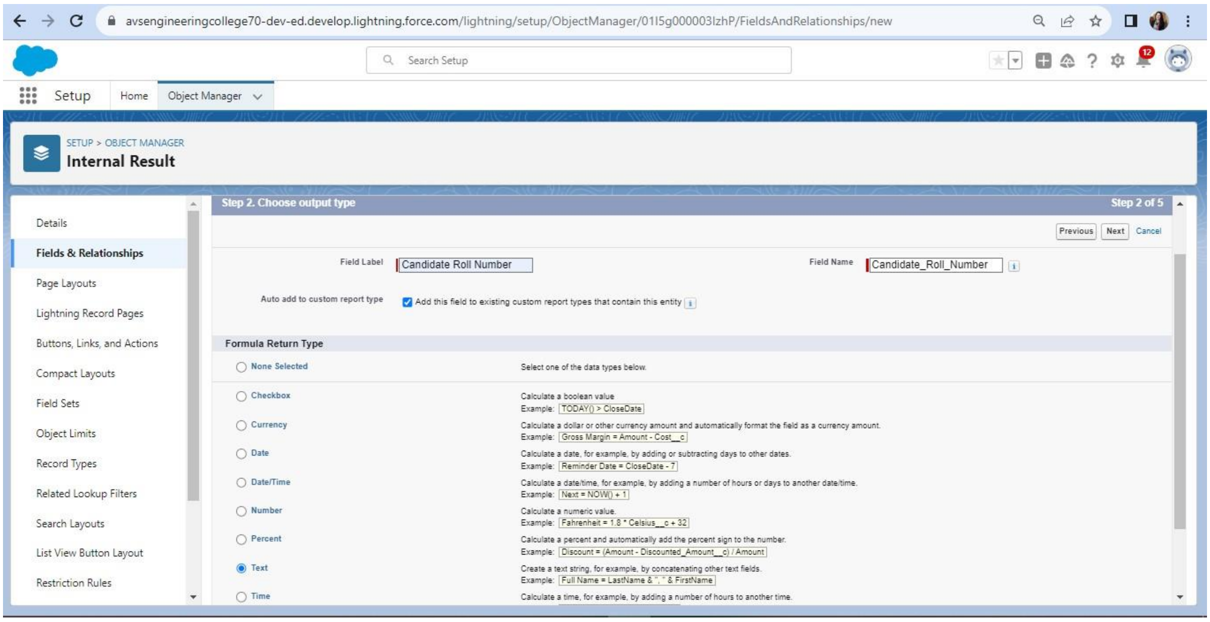

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003IzhP/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Internal Result
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Internal Result
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
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
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
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.


avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003IzmG/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Course Detail
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
Course Detail
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
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
Number of digits to the left of the decimal point
Decimal Places
0
Number of digits to the right of the decimal point
Field Name
Duration
Description
Help Text
Enter Course duration value in Years
Required
Always require a value in this field in order to save a record
Unique
Do not allow duplicate values
External ID
Set this field as the unique record identifier from an external system
AI Prediction
Use this field to store AI prediction scores


avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003IzmG/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Course Detail
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
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
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
Number of digits to the left of the decimal point
Decimal Places
0
Number of digits to the right of the decimal point
Field Name
Duration
Description
Help Text
Enter Course duration value in Years
Required
Always require a value in this field in order to save a record
Unique
Do not allow duplicate values
External ID
Set this field as the unique record identifier from an external system
AI Prediction
Use this field to store AI prediction scores


avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003IzhP/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Internal Result
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
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
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
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.

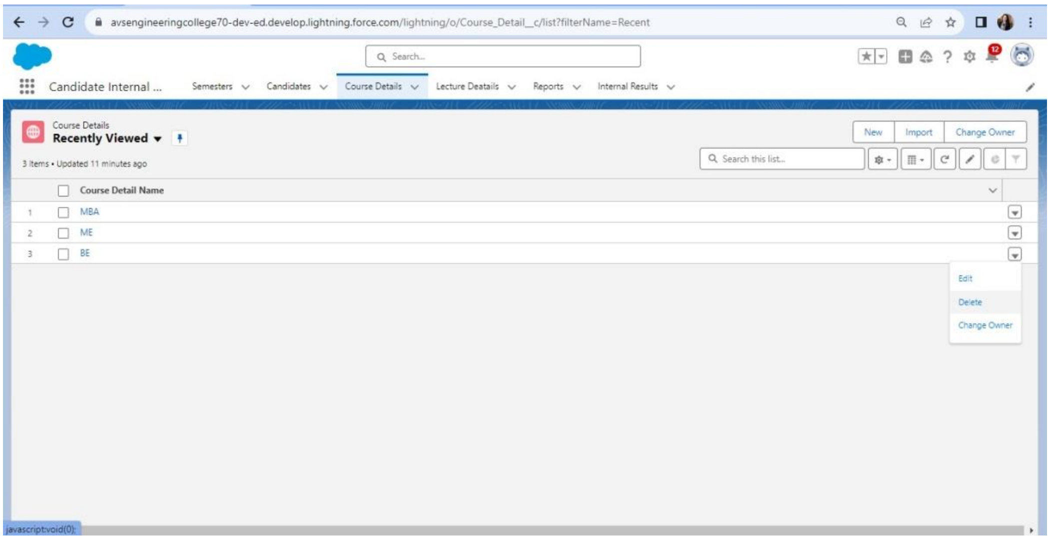

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
1 Items, Sorted by Label
internal
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Internal Result
Internal_Result__c
Custom Object
19/10/2023

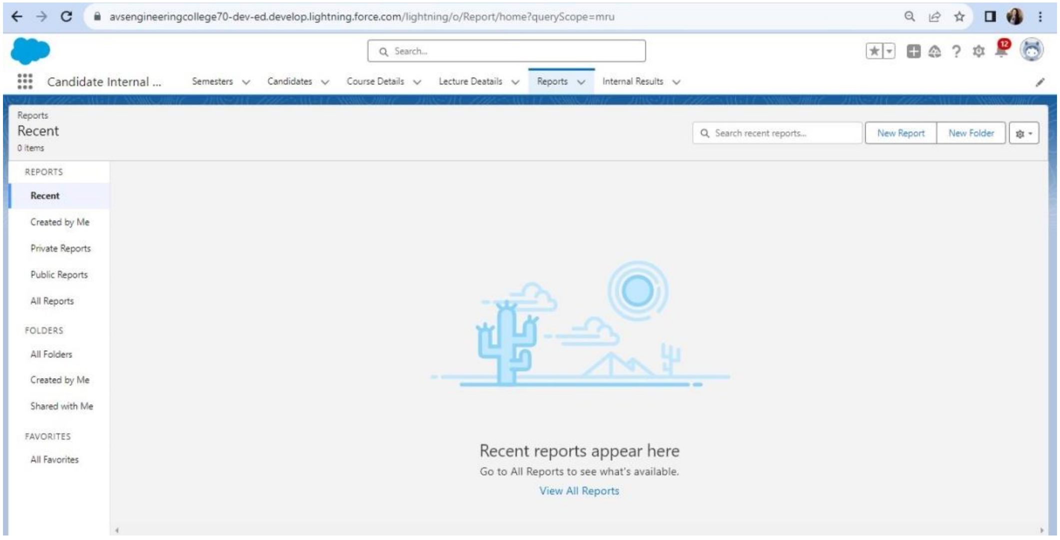

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003IzhP/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Internal Result
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
Candidate Roll Number
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
Create a text string, for example, by concatenating other text fields.
Example: Full Name = LastName & ", " & FirstName
Time
Calculate a time, for example, by adding a number of hours to another time.

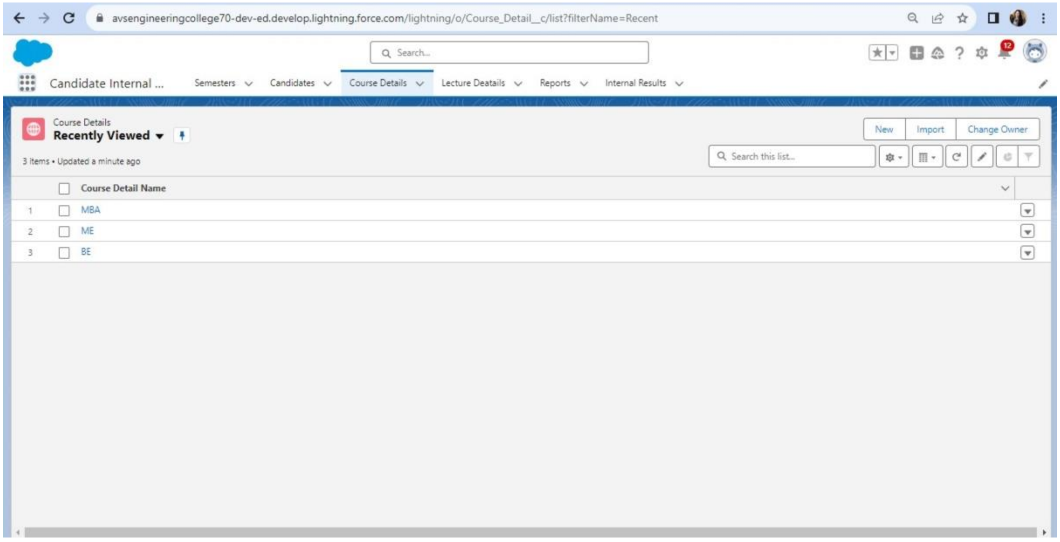
CHAPTER-3

USERS & DATA SECURITY

3.1 User Creation & Setup Approvals

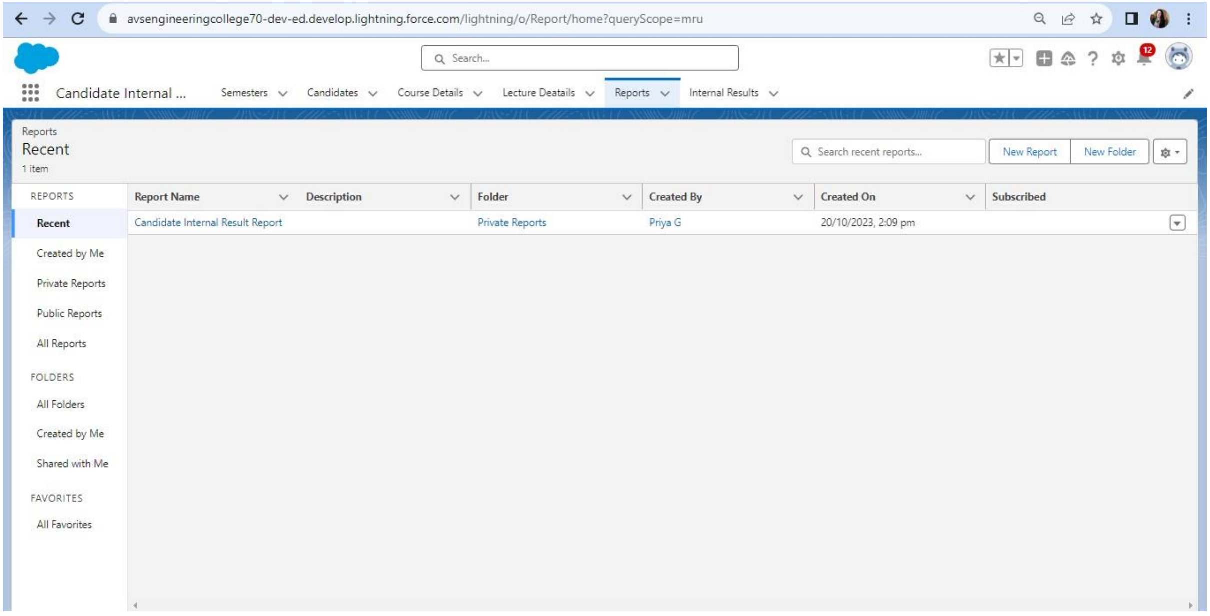


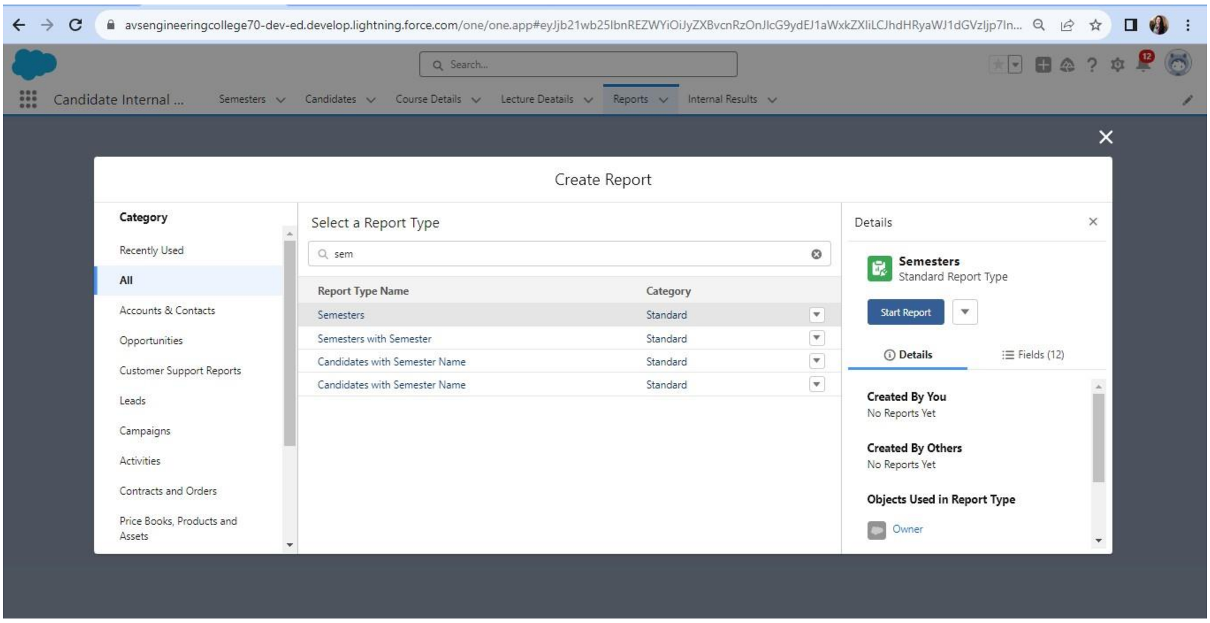


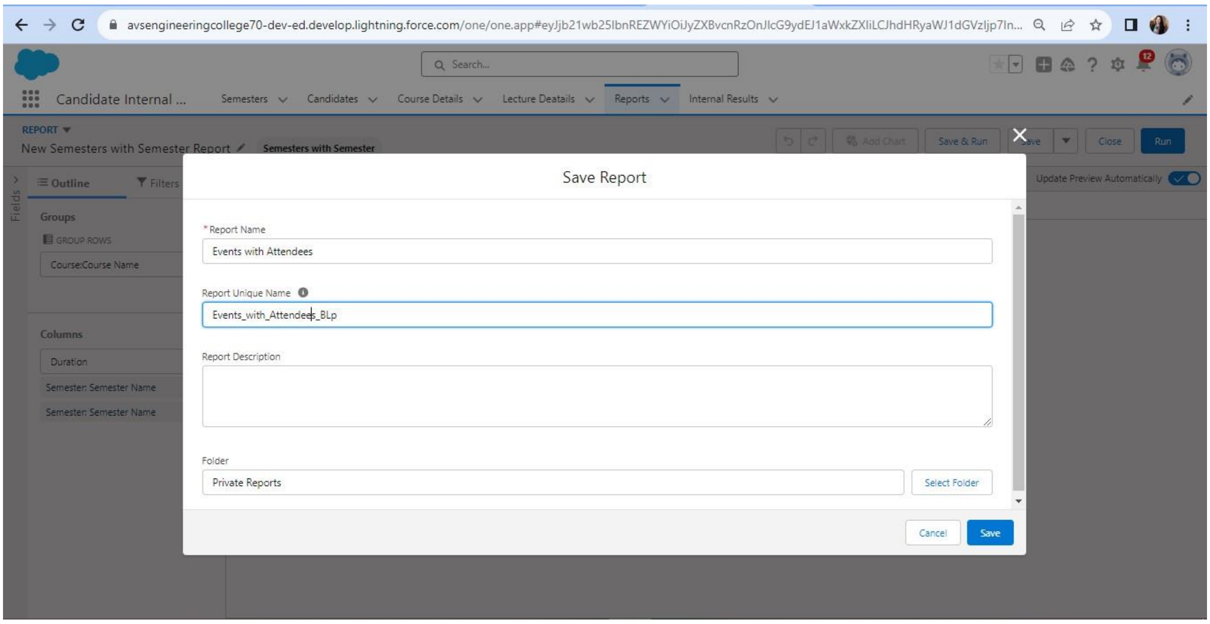


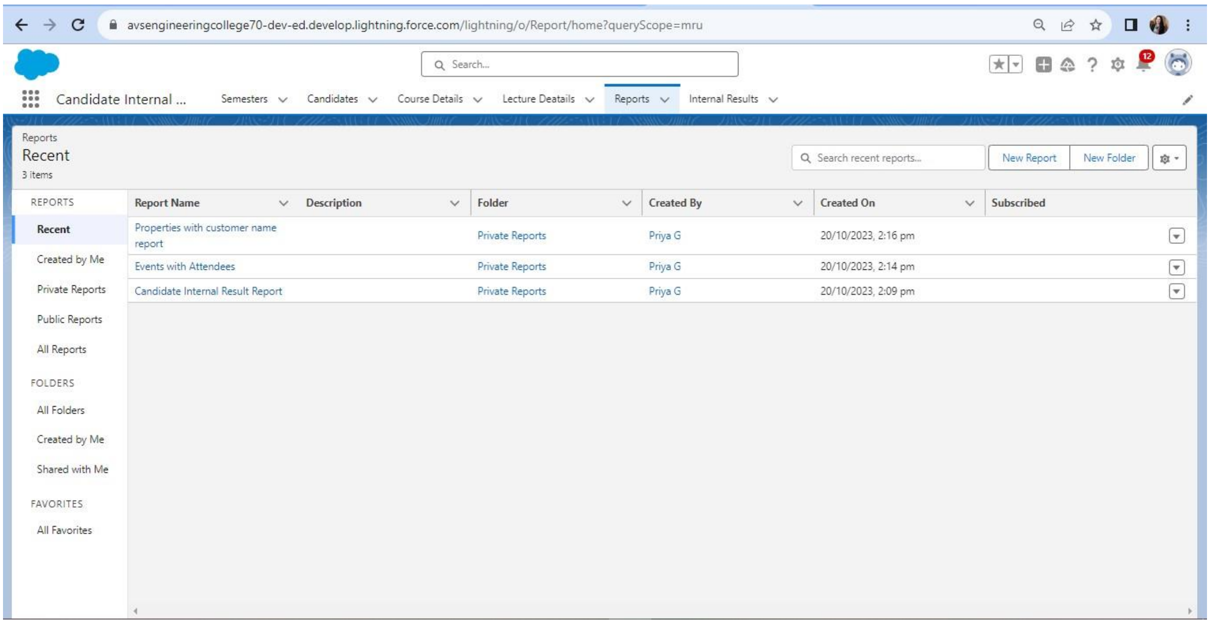
REPORTS & DASHBOARD

4.1.REPORTS:

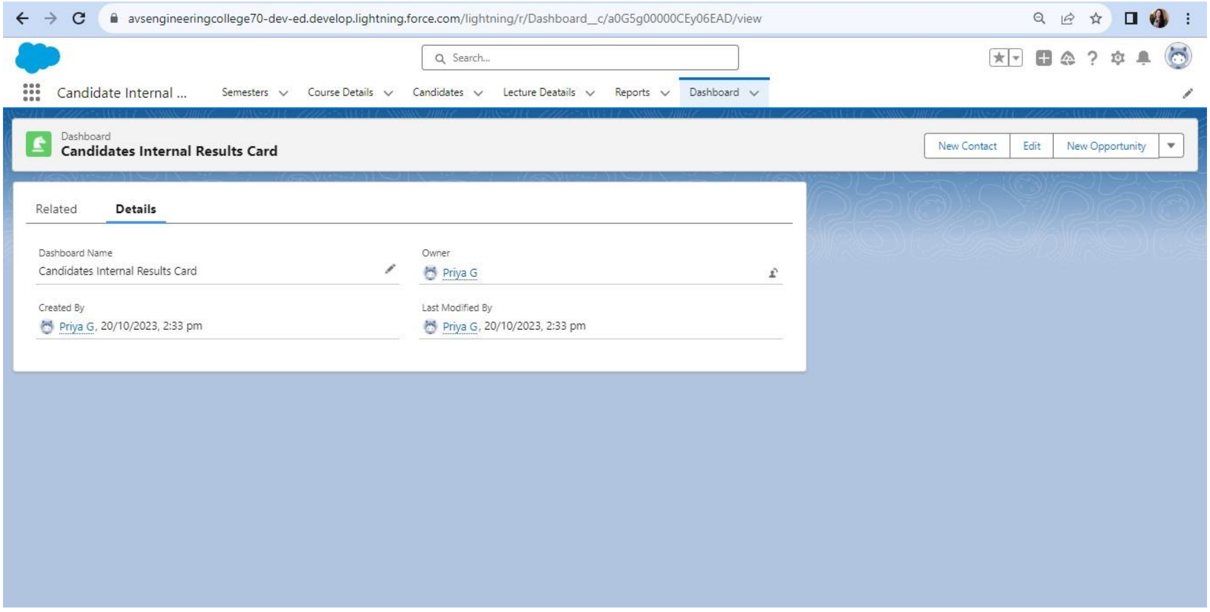


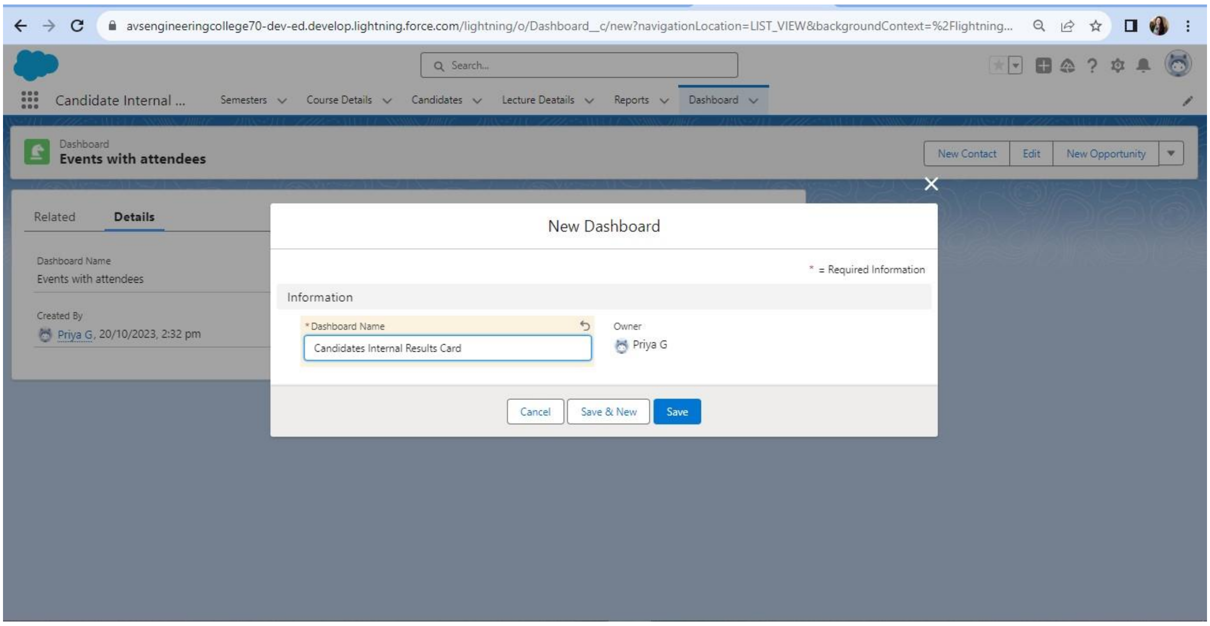


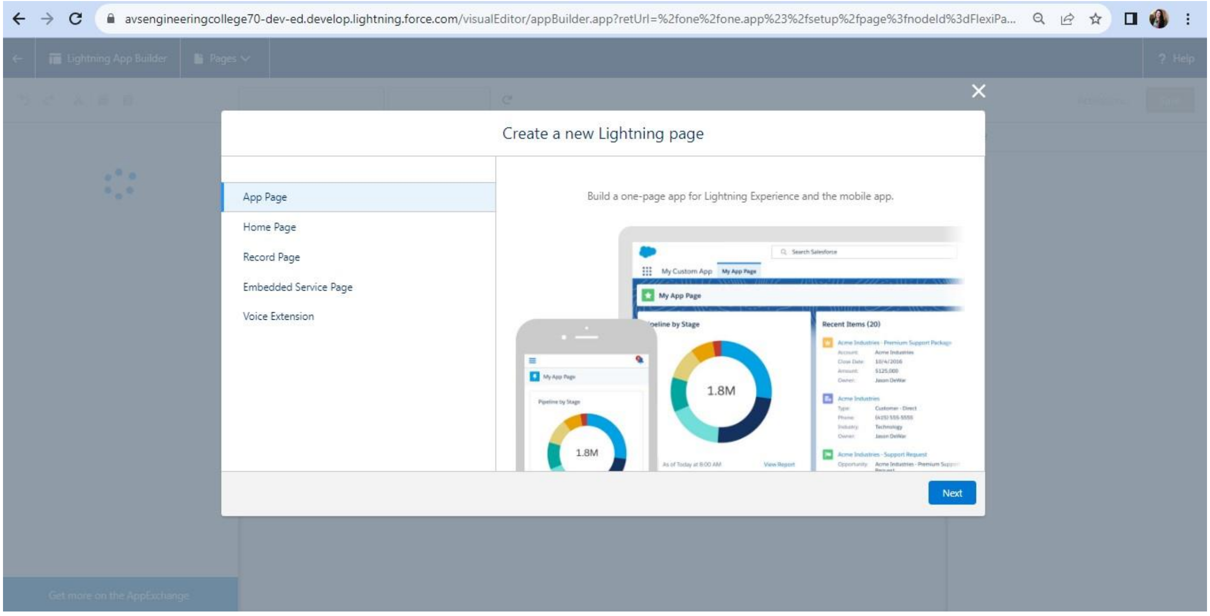


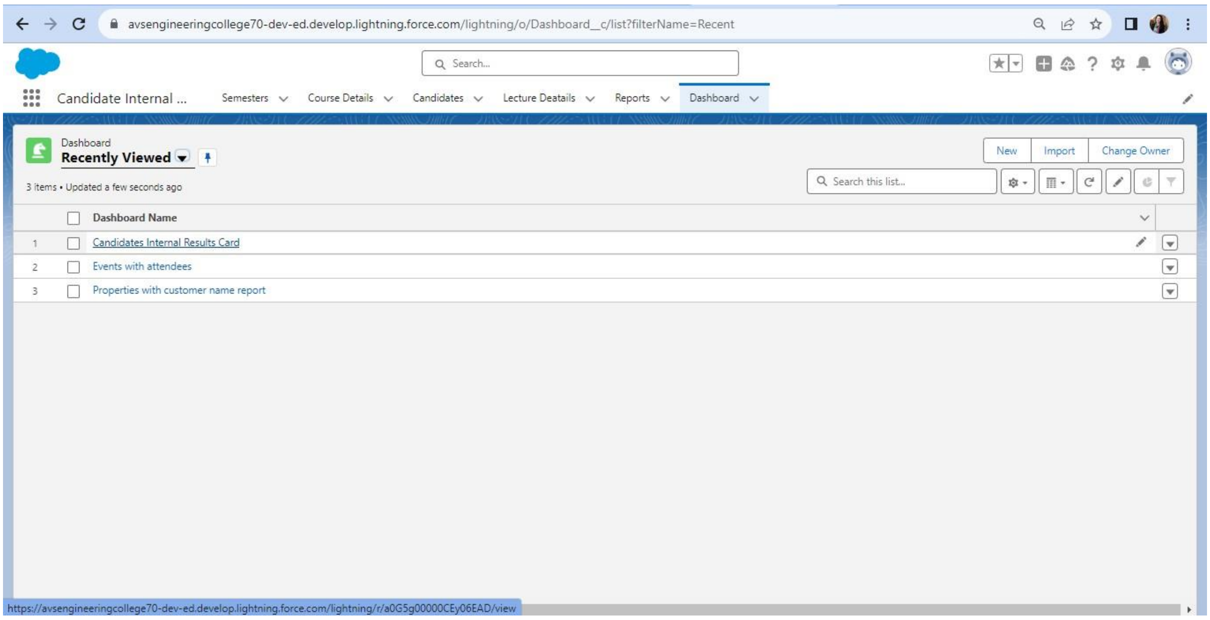


4.2.DASHBOARDS:

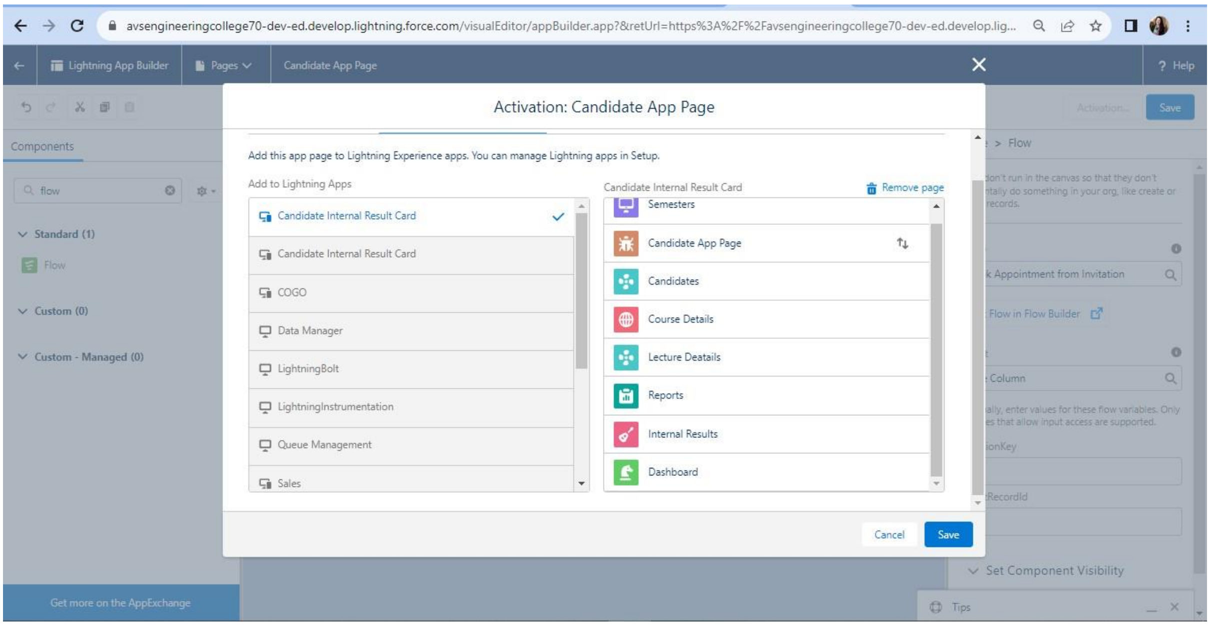

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/r/Dashboard__c/a0G5g00000CEy06EAD/view
Search...
Candidate Internal ...
Semesters
Course Details
Candidates
Lecture Deatails
Reports
Dashboard
Dashboard
Candidates Internal Results Card
New Contact
Edit
New Opportunity
Related
Details
Dashboard Name
Candidates Internal Results Card
Owner
Priya G
Created By
Priya G, 20/10/2023, 2:33 pm
Last Modified By
Priya G, 20/10/2023, 2:33 pm

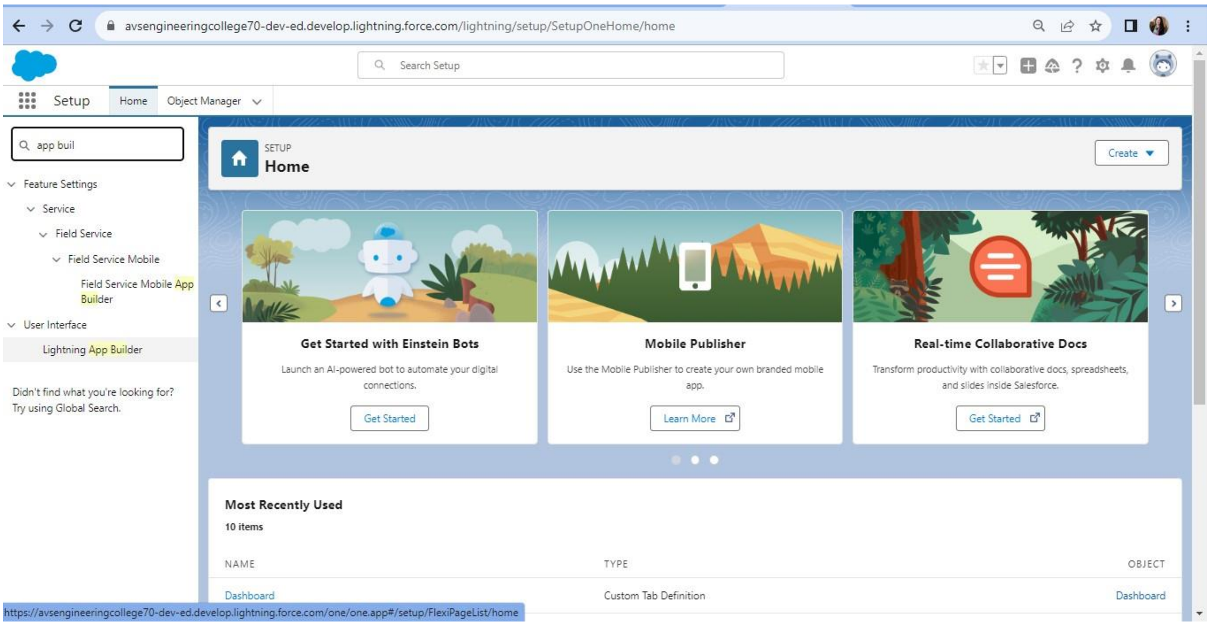

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/o/Dashboard__c/new?navigationLocation=LIST_VIEW&backgroundContext=%2Flightning...
Search...
Candidate Internal ...
Semesters
Course Details
Candidates
Lecture Deatails
Reports
Dashboard
Dashboard
Events with attendees
New Contact
Edit
New Opportunity
Related
Details
Dashboard Name
Events with attendees
Created By
Priya G, 20/10/2023, 2:32 pm
New Dashboard
* = Required Information
Information
* Dashboard Name
Candidates Internal Results Card
Owner
Priya G
Cancel
Save & New
Save

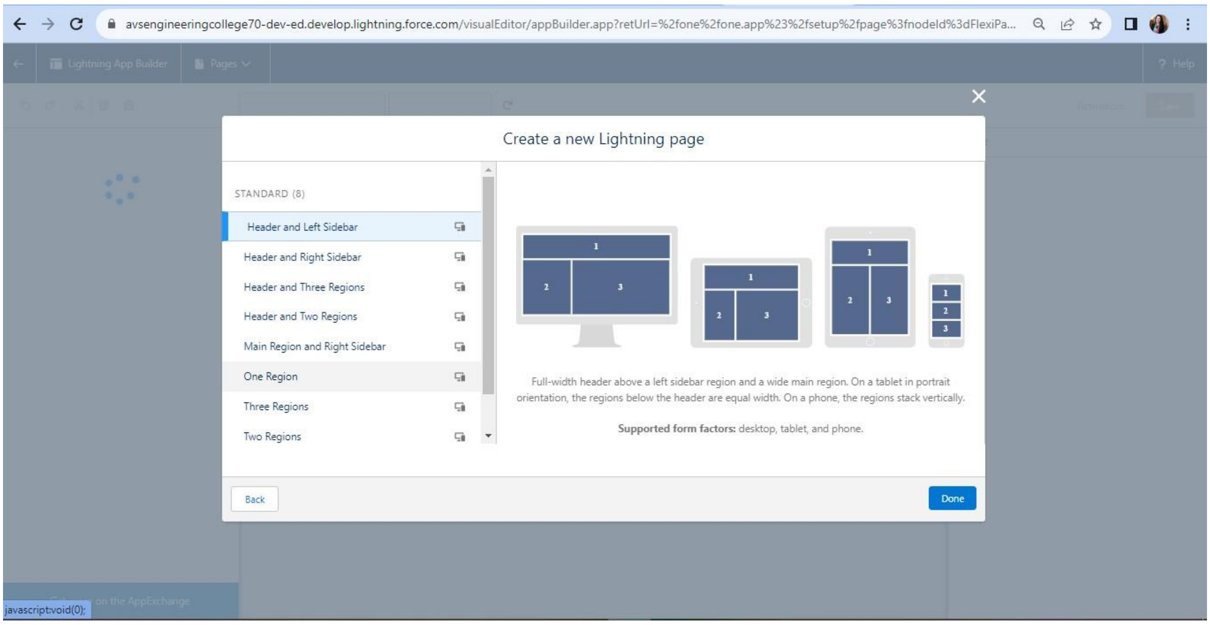

avsengineeringcollege70-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?retUrl=%2fone%2fone.app%23%2fsetup%2fpage%3fnodeId%3dFlexiPa...
Create a new Lightning page
App Page
Home Page
Record Page
Embedded Service Page
Voice Extension
Build a one-page app for Lightning Experience and the mobile app.
1.8M
Next

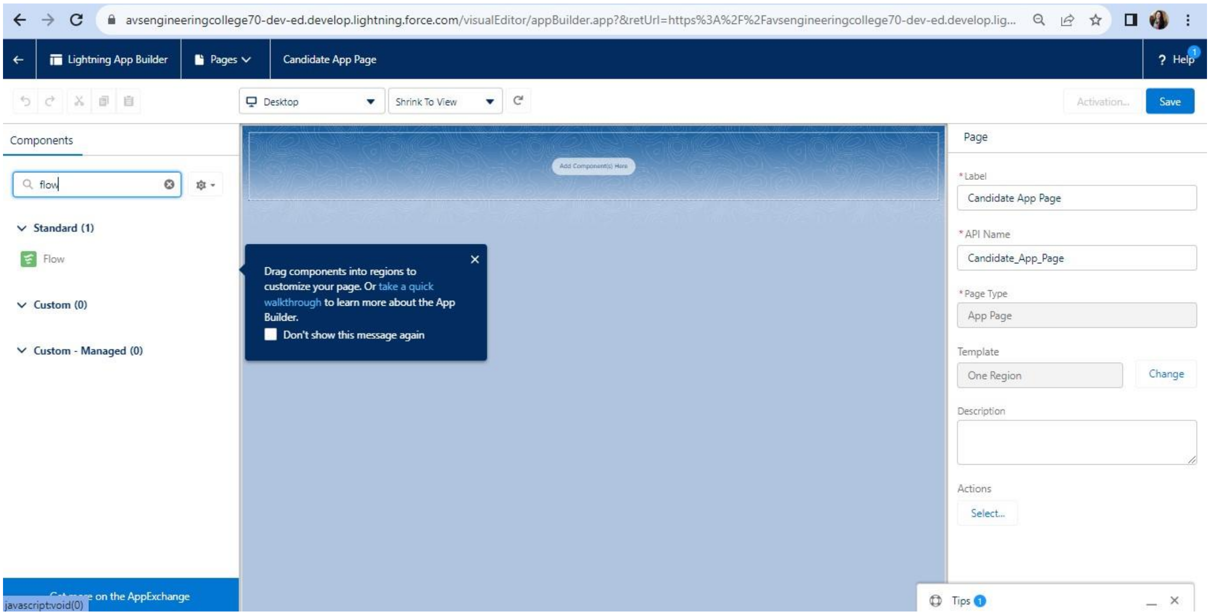

avsengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/o/Dashboard__c/list?filterName=Recent
Candidate Internal ...
Semesters
Course Details
Candidates
Lecture Deatails
Reports
Dashboard
Recently Viewed
New
Import
Change Owner
3 items • Updated a few seconds ago
Dashboard Name
Candidates Internal Results Card
Events with attendees
Properties with customer name report

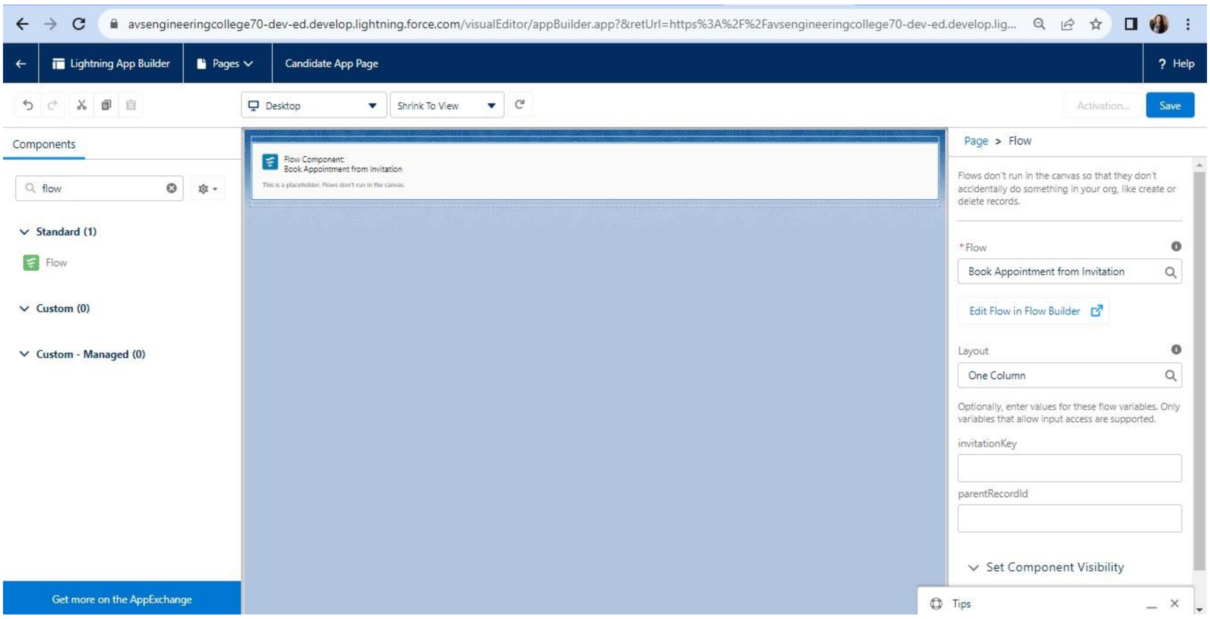
4.3.APPS:

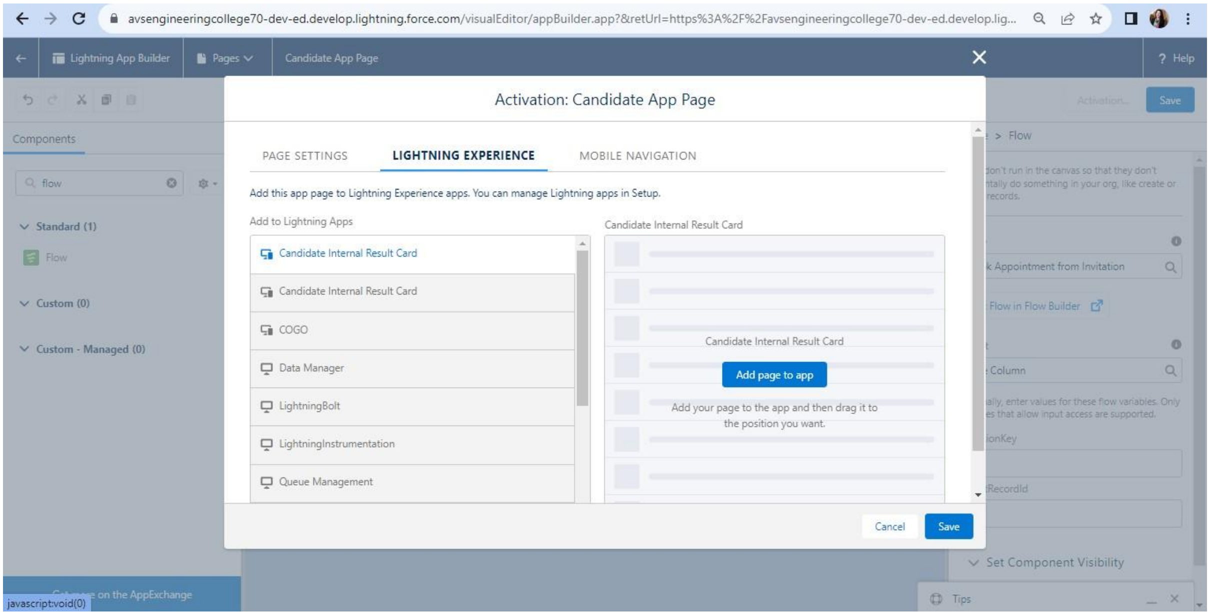





avsengineeringcollege70-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?retUrl=%2fone%2fone.app%23%2fsetup%2fpage%3fnodeId%3dFlexiPa...
Create a new Lightning page
STANDARD (8)
Header and Left Sidebar
Header and Right Sidebar
Header and Three Regions
Header and Two Regions
Main Region and Right Sidebar
One Region
Three Regions
Two Regions
Full-width header above a left sidebar region and a wide main region. On a tablet in portrait orientation, the regions below the header are equal width. On a phone, the regions stack vertically.
Supported form factors: desktop, tablet, and phone.
Back
Done


avsengineeringcollege70-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?&retUrl=https%3A%2F%2Favsengineeringcollege70-dev-ed.develop.lig...
Lightning App Builder
Pages
Candidate App Page
Help
Desktop
Shrink To View
Activation...
Save
Components
flow
Standard (1)
Flow
Custom (0)
Custom - Managed (0)
Drag components into regions to customize your page. Or take a quick walkthrough to learn more about the App Builder.
Don't show this message again
Page
*Label
Candidate App Page
*API Name
Candidate_App_Page
*Page Type
App Page
Template
One Region
Change
Description
Actions
Select...
Tips
javascript:void(0)


avsengineeringcollege70-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?&retUrl=https%3A%2F%2Favsengineeringcollege70-dev-ed.develop.lig...
Lightning App Builder
Pages
Candidate App Page
? Help
Desktop
Shrink To View
Activation...
Save
Components
flow
Standard (1)
Flow
Custom (0)
Custom - Managed (0)
Get more on the AppExchange
Flow Component:
Book Appointment from Invitation
Page > Flow
Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.
* Flow
Book Appointment from Invitation
Edit Flow in Flow Builder
Layout
One Column
Optionally, enter values for these flow variables. Only variables that allow input access are supported.
invitationKey
parentRecordId
Set Component Visibility
Tips


avsengineeringcollege70-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?&retUrl=https%3A%2F%2Favsengineeringcollege70-dev-ed.develop.lig...
Activation: Candidate App Page
PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION
Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.
Add to Lightning Apps
Candidate Internal Result Card
Candidate Internal Result Card
Candidate Internal Result Card
COGO
Data Manager
LightningBolt
LightningInstrumentation
Queue Management
Candidate Internal Result Card
Add page to app
Add your page to the app and then drag it to the position you want.
Cancel
Save

CHAPTER - 5

5.1.CONCLUSION:

In conclusion, implementing a CRM (Customer Relationship Management) system for result tracking in the context of a candidate's internal marks can greatly enhance the efficiency and effectiveness of educational institutions. This solution not only streamlines the process of recording and monitoring individual academic progress but also fosters improved communication and engagement between candidates, educators, and administrative staff. By providing real-time access to academic data, facilitating personalized support, and generating insightful analytics, a CRM for result tracking ensures that candidates receive the best possible educational experience and support, ultimately contributing to their overall success and growth.

CHAPTER - 6

PROJECT DEMONSTRATION:

Github Link:

https://github.com/Srimythili30/Salesforce/tree/main/Project

Demo Link:

https://youtu.be/q4uBTBPA0ww?si=3qKLVOFd96Q0dz20