

# Implementing CRM For Result Tracking Of A Candidate With Internal Marks



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## **PROJECT REPORT**

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*in*

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**AVS ENGINEERING COLLEGE,**

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**BONAFIDE CERTIFICATE**

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## **LIST OF ABBREVIATION**

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

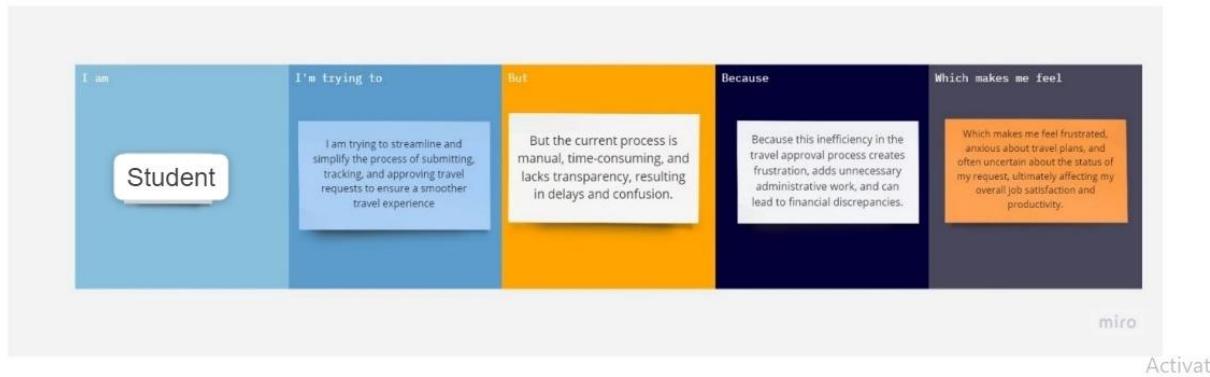
**Data migration:** The project team will migrate data from existing systems to the new CRM system. This may include data on candidates, courses, and internal marks.

**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:

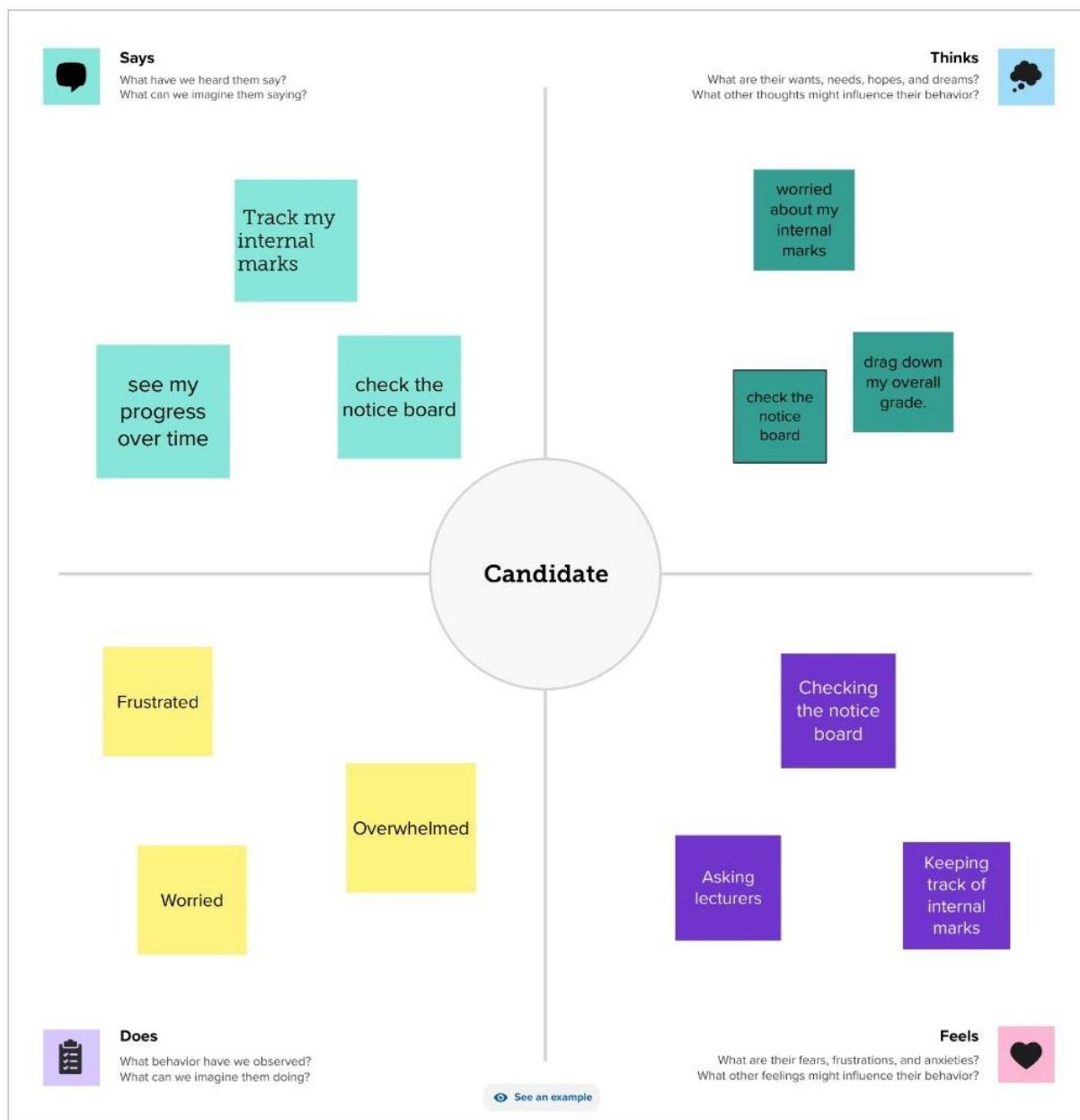


<b>Problem Statement (PS)</b>	<b>I am (Student)</b>	<b>I'm trying to</b>	<b>But Because</b>	<b>Which makes me feel</b>
Implementing CRM for Result Tracking for a Candidate with Internal Marks	A student in an educational institution	Access and review my internal marks and academic progress	The existing 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 help 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:

2

**Brainstorm**

Write down any ideas that come to mind that address your problem statement.

10 minutes

**TIP**

You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

**Person 1**

What are the current challenges with tracking candidate results and internal marks?

How can the CRM be used to improve the efficiency and effectiveness of the result tracking process?

**Person 2**

Create a central repository for all candidate data, including internal marks.

Generate reports on candidate performance, both individual and cohort-wide.

**Person 3**

Integrate the CRM with other systems, such as LMS and SIS, to streamline the result tracking process.

Generate reports on candidate performance, both individual and cohort-wide.

**Person 4**

Provide candidates with access to their own results and feedback.

How can the CRM be used to provide better feedback and support to candidates?

## Step-2: Brainstorm, Idea Listing and Grouping:

3

### Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

TIP

Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.

How can the CRM be integrated with other systems, such as learning management systems (LMS) and student information systems (SIS)

How can the CRM be used to provide better feedback and support to candidates?



## Step-3: Idea Prioritization:

4

### Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⌚ 20 minutes

**TIP** Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the H key on the keyboard.

The matrix has 'Importance' on the vertical axis and 'Feasibility' on the horizontal axis. The top-left quadrant is green (Importance +, Feasibility +), the top-right is blue (Importance +, Feasibility -), the bottom-left is red (Importance -, Feasibility -), and the bottom-right is purple (Importance -, Feasibility +). Each quadrant contains a question:

- Impact:** How much of a positive impact will the idea have on the result tracking process?
- Effort:** How much effort and resources will be required to implement the idea?
- Feasibility:** How realistic is it to implement the idea given the current constraints?
- Timeline:** How long will it take to implement the idea?

**Importance**  
If each of these tasks could be done without any difficulty or cost, which would have the most positive impact?

**Feasibility**  
Regardless of their importance, which tasks are more feasible than others? (Cost, time, effort, complexity, etc.)

**Process Flow:** The diagram shows a sequence of four stages: 1. A blank grid. 2. A grid with yellow squares. 3. A grid with yellow squares and arrows. 4. A grid with many yellow squares.

## **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	<p>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.</p> <p>It is important to provide comprehensive training to staff so that they are able to use the system effectively.</p>
<b>5</b>	Launch the system and provide support to users during the transition period	<p>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.</p> <p>This support may include providing online resources, answering questions, and resolving any problems that users encounter.</p>
<b>6</b>	Monitor and evaluate the system on an ongoing basis	<p>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.</p> <p>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.</p>

## **1.7 Functional & Technical Requirements:**

### **1.7.1 Functional Requirements:**

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

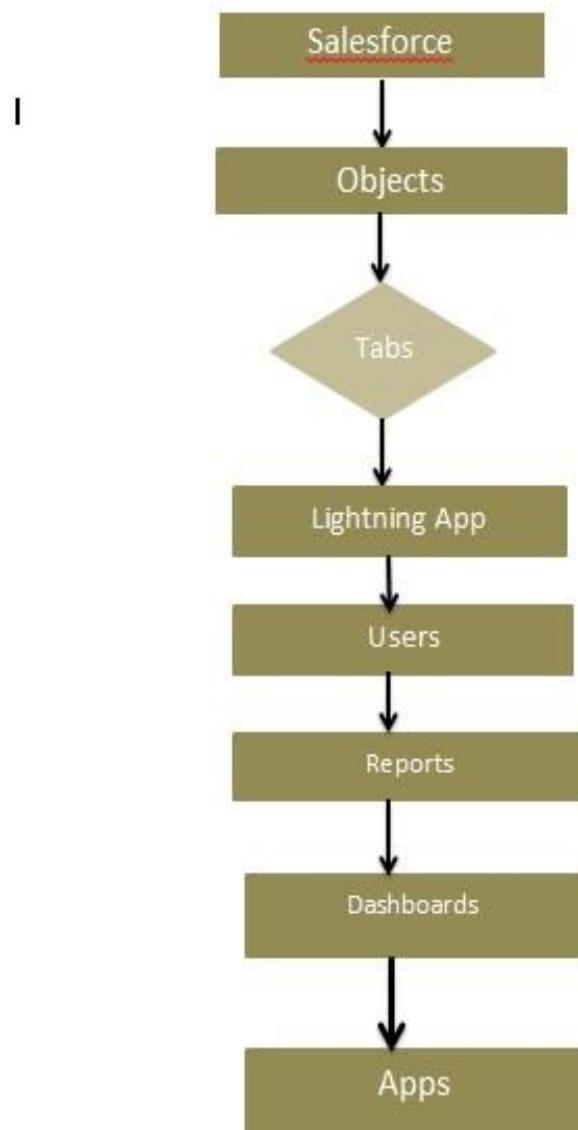
### **1.7.1 Technical Requirements:**

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

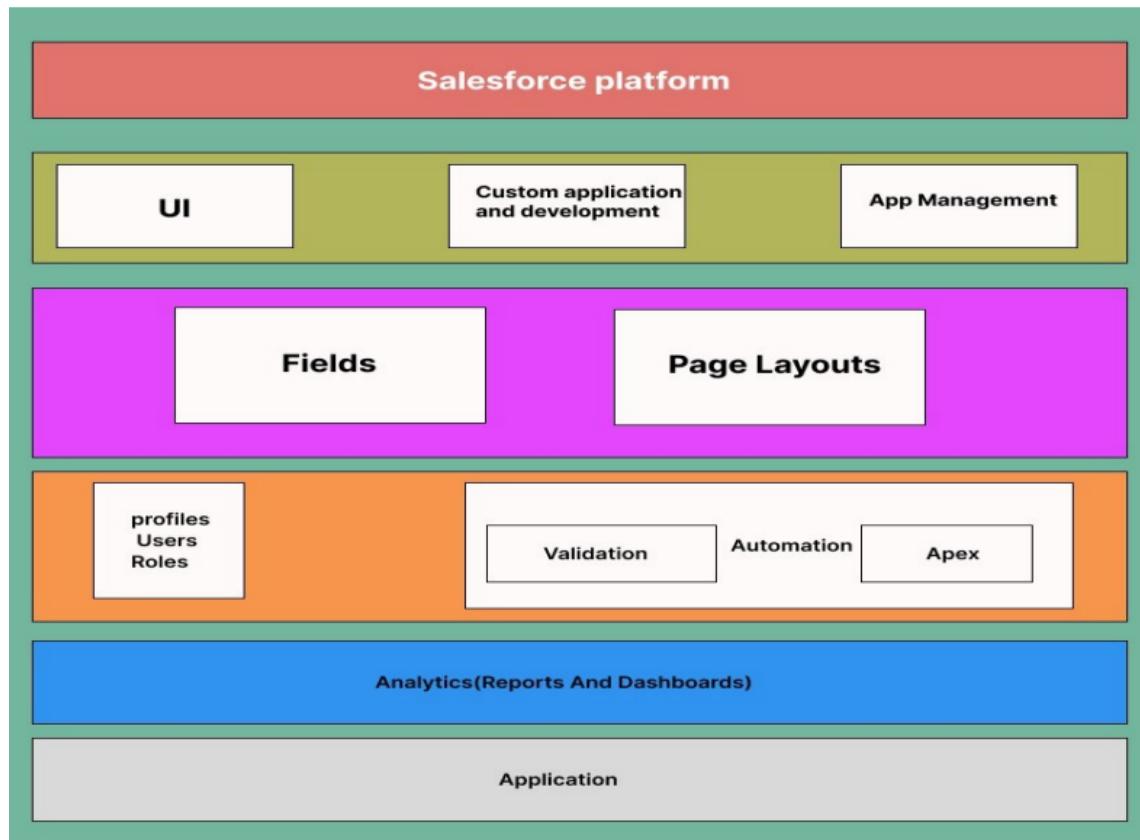
## 1.8 Project Road Map:

### 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 Architecture:



**TABLE-1: Component and Technologies:**

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

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

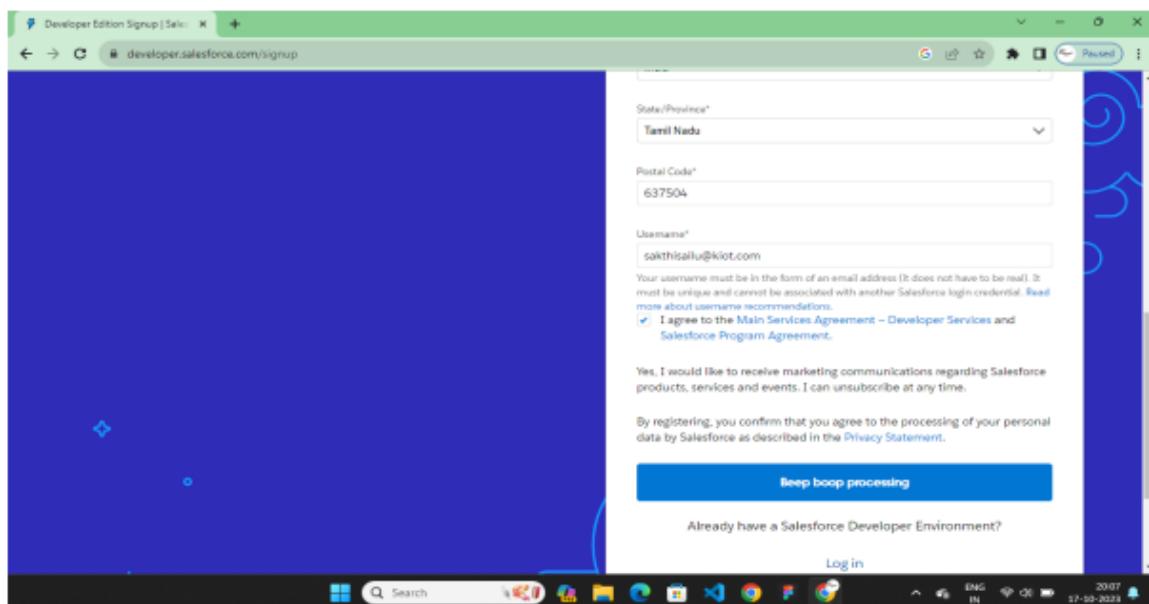
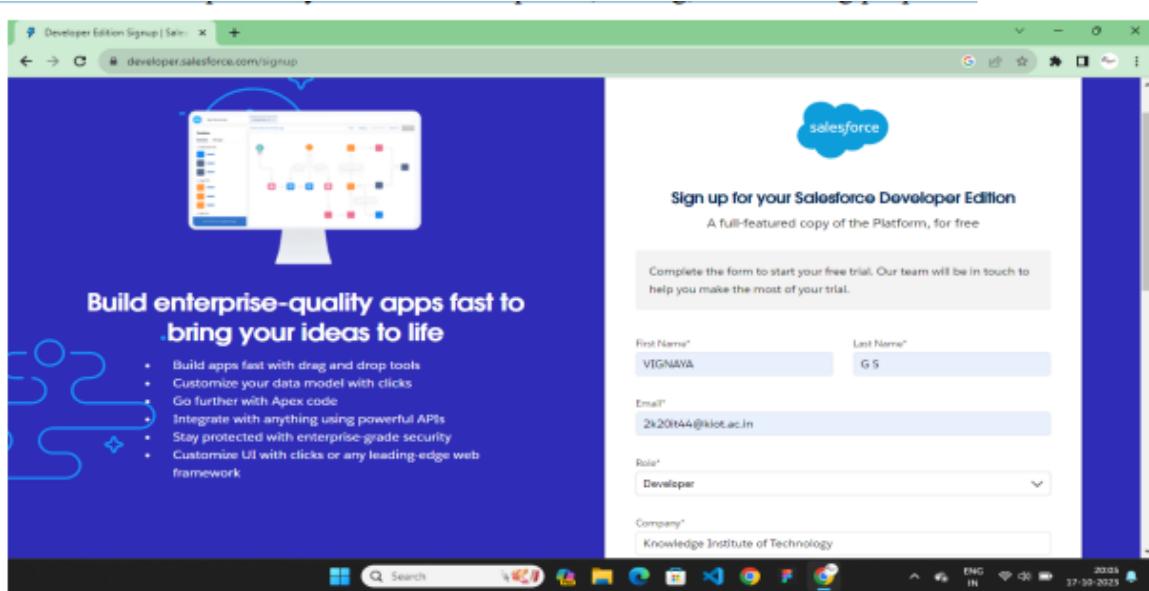
		performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	
6.	Reporting and Analytics	Enable users to generate custom reports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.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

# CHAPTER-2

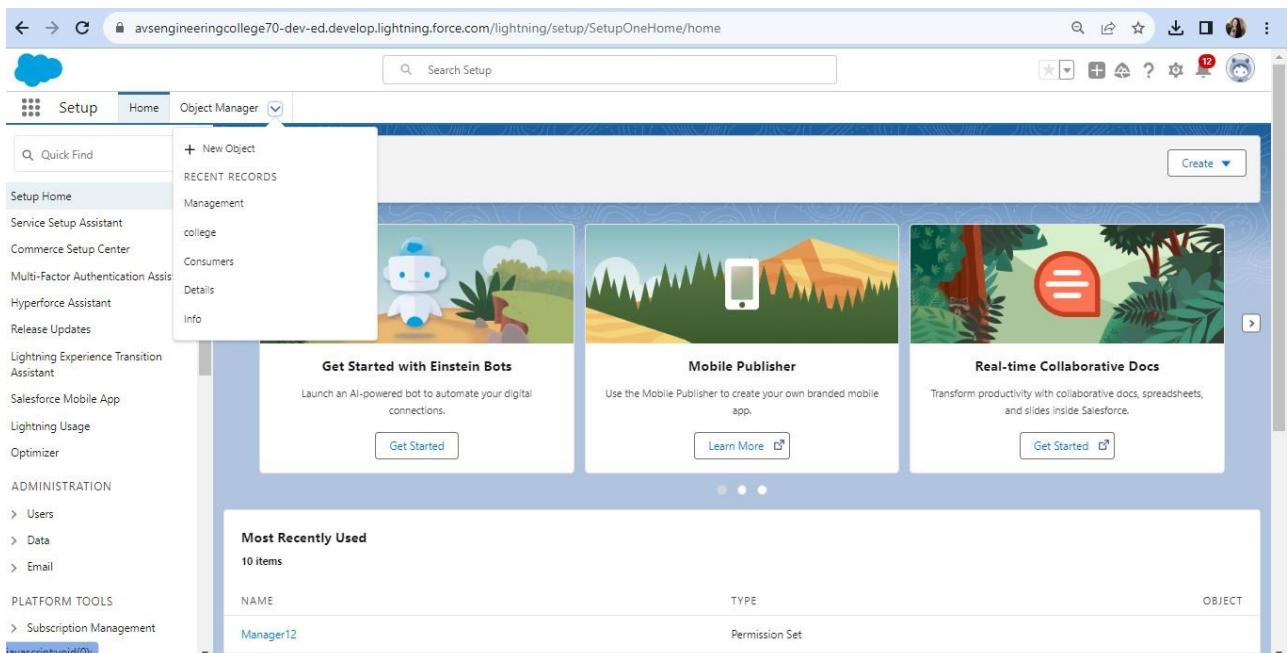
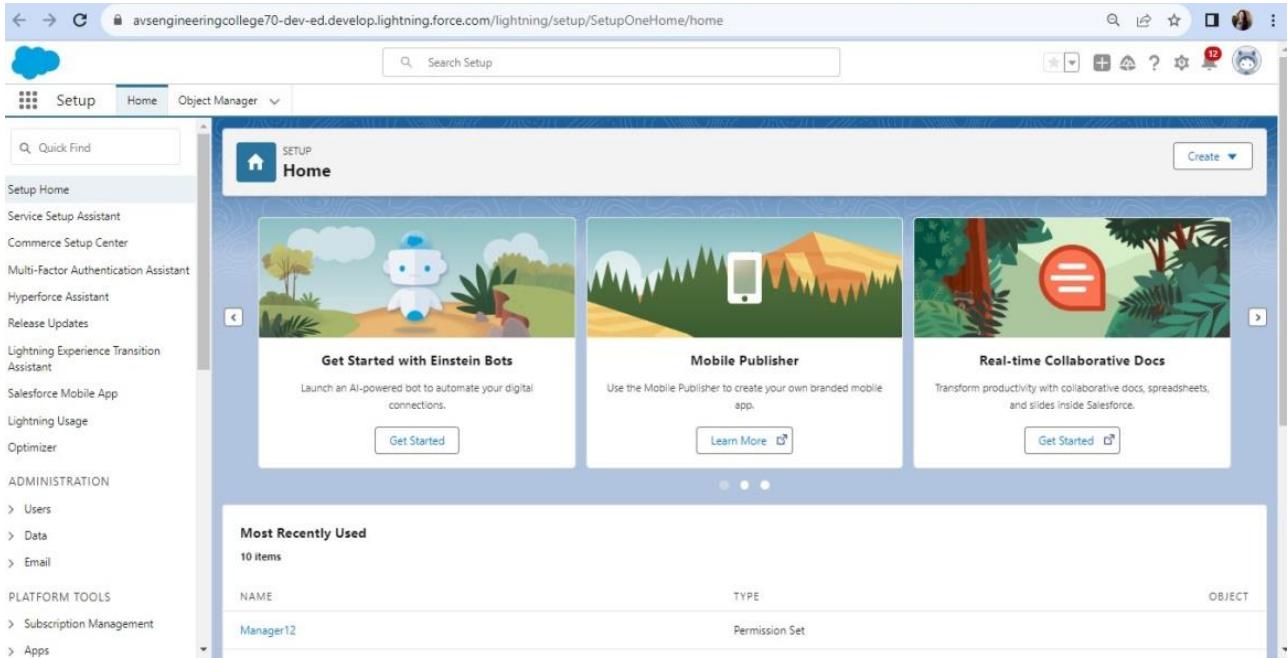
## PREPARATION DATA MODELING

### 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:



The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, and Administration. The main area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative". A dropdown menu on the right shows options like User, Multiple Users, Custom Object, etc. A modal window titled "Custom Object Definition Edit" is open in the foreground.

### Custom Object Definition Edit

Save | Save & New | Cancel

#### Custom Object 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	<input type="checkbox"/>	

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	<input type="button" value="▼"/>

#### 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

[avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FretURL%3D%2Fsetup%2Fobjec...](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FretURL%3D%2Fsetup%2Fobjec...)

The screenshot shows the Salesforce Setup Object Manager interface. A message at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." Below this, the "Custom Object Definition Edit" section is displayed. It includes fields for "Label" (Lecture Detail), "Plural Label" (Lecture Details), and "Object Name" (Lecture\_Detail). There are also sections for "Description" and "Context-Sensitive Help Setting" (with options for standard help or Visualforce page). A "Content Name" dropdown is set to "None".

[avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FretURL%3D%2Fsetup%2Fobjec...](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FretURL%3D%2Fsetup%2Fobjec...)

This screenshot continues the setup process. It shows the "Record Name" field set to "Lecture Detail Name" and the "Data Type" set to "Text". The "Optional Features" section includes checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing". Under "Object Classification", settings for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access" are checked. The "Deployment Status" section shows "Deployed" selected. The "Search Status" section has "Allow Search" checked.

The screenshot shows the "Object Creation Options" section, which is only available when the custom object is first created. It includes checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object". At the bottom, there are "Save", "Save & New", and "Cancel" buttons.

<https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FretURL%3D%2Fsetup%2Fobjec...>

New Custom Object

Custom Object Definition Edit

Custom Object 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	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Internal_Result	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-

<https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FretURL%3D%2Fsetup%2Fobjec...>

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	Internal Result 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

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

<https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FretURL%3D%2Fsetup%2Fobjec...>

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Lecture Detail	Example: Account
Plural Label	Lecture Details	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Lecture_Detail	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-

## 2.2.1.TABS:

The screenshot shows the Salesforce Setup Home page. The left sidebar has 'Setup' selected. Under 'User Interface', 'Tabs' is selected. A search bar at the top right contains 'Search Setup'. The main content area is titled 'Home' and features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' with a table showing one item: 'Manager12' (Type: Permission Set). The URL in the browser is <https://avsenengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>.

The screenshot shows the 'Custom Tabs' setup page. The left sidebar has 'Setup' selected. Under 'User Interface', 'Tabs' is selected. A search bar at the top right contains 'Search Setup'. The main content area is titled 'Tabs' and lists various standard tabs with checkboxes. Most checkboxes are checked. At the bottom is a checkbox for 'Append tab to users' existing personal customizations'. The URL in the browser is <https://avsenengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...>

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the navigation is a sidebar with a 'User Interface' section containing 'Rename Tabs and Labels' and 'Tabs'. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists several tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit   Del	colleagues	Lightning	
Edit   Del	Consumers	Fan	
Edit   Del	departments	Cell phone	
Edit   Del	Details	Hexagon	
Edit   Del	Management	Globe	

The 'Web Tabs' and 'Visualforce Tabs' sections both indicate 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined'.

The screenshot shows the 'New Custom Object Tab' wizard step 1 of 3. The top navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'New Custom Object Tab' and 'Step 1. Enter the Details'. It asks to choose a custom object for the new tab. A dropdown menu shows 'Object' set to 'Semester' and 'Tab Style' set to 'Computer'. An optional field for a 'Splash Page Custom Link' is set to '--None--'. A text input field for 'Description' is empty. At the bottom right are 'Next' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the URL [avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...). The left sidebar is titled 'Setup' and includes 'User Interface' sections for 'Rename Tabs and Labels' and 'Tabs'. A search bar at the top right says 'Search Setup'. The main content area is titled 'Tabs' and 'New Custom Object Tab'. It's 'Step 1 of 3' of the 'Enter the Details' wizard. The form asks to 'Select an existing custom object or create a new custom object now.' The 'Object' dropdown is set to '-None-' and the 'Tab Style' dropdown is also set to '-None-'. There's an optional field for a 'Splash Page Custom Link' which is also '-None-'. A 'Description' text area is empty. At the bottom right are 'Next' and 'Cancel' buttons.

This screenshot is identical to the one above, but with different values selected in the dropdown menus. The 'Object' dropdown now shows 'Internal Result' and the 'Tab Style' dropdown shows 'Computer'. All other fields and the overall layout remain the same.

New Custom Object Tab

Step 1. Enter the Details

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:

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:

Enter a short description.

Description:

Next Cancel

New Custom Object Tab

Step 1. Enter the Details

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:

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:

Enter a short description.

Description:

Next Cancel

The screenshot shows the Salesforce Setup interface with the URL [avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...). The page title is "New Custom Object Tab".

**Step 1. Enter the Details**

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: (empty text area)

Buttons: Next, Cancel

The screenshot shows the Salesforce Setup interface with the URL [avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...). The page title is "New Custom Object Tab".

**Step 1. Enter the Details**

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.

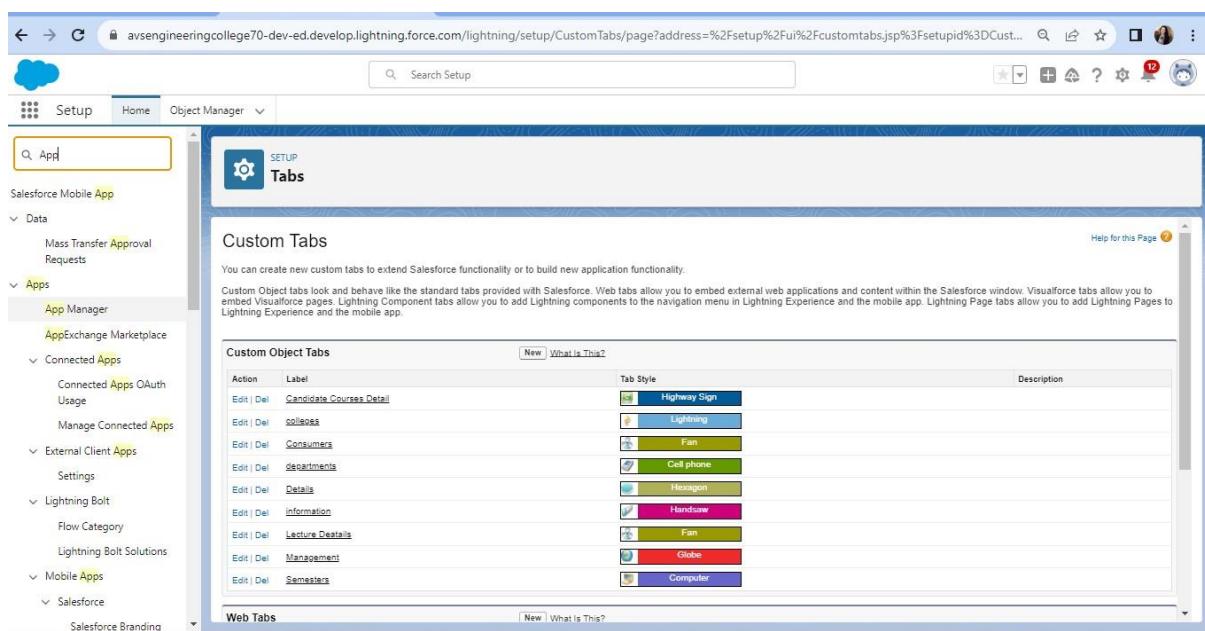
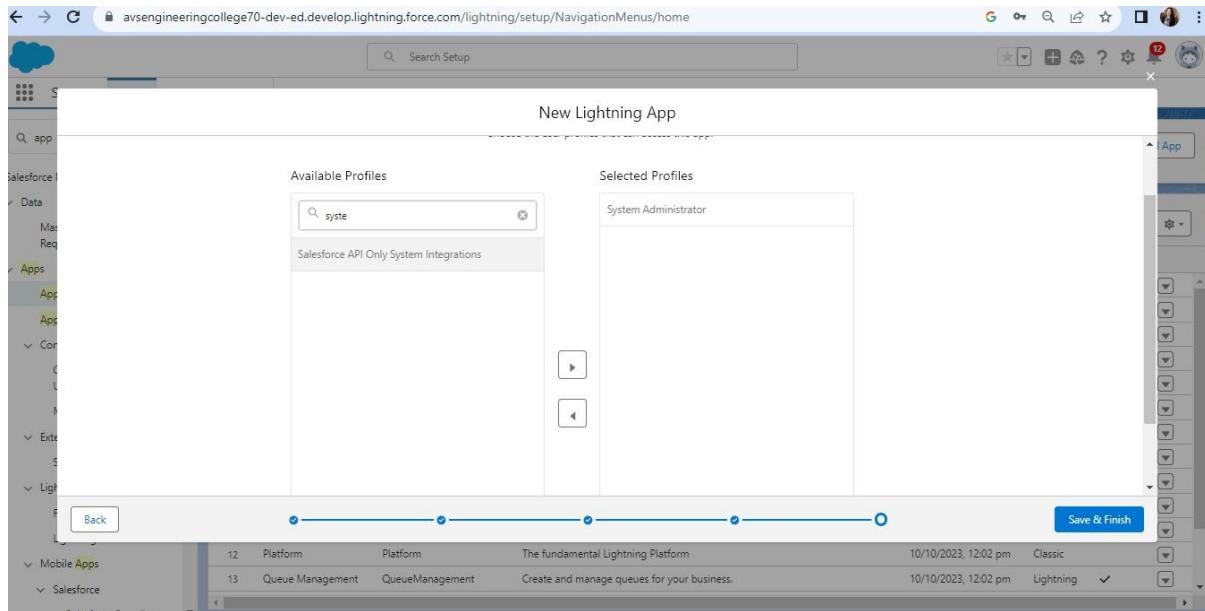
Splash Page Custom Link: -None--

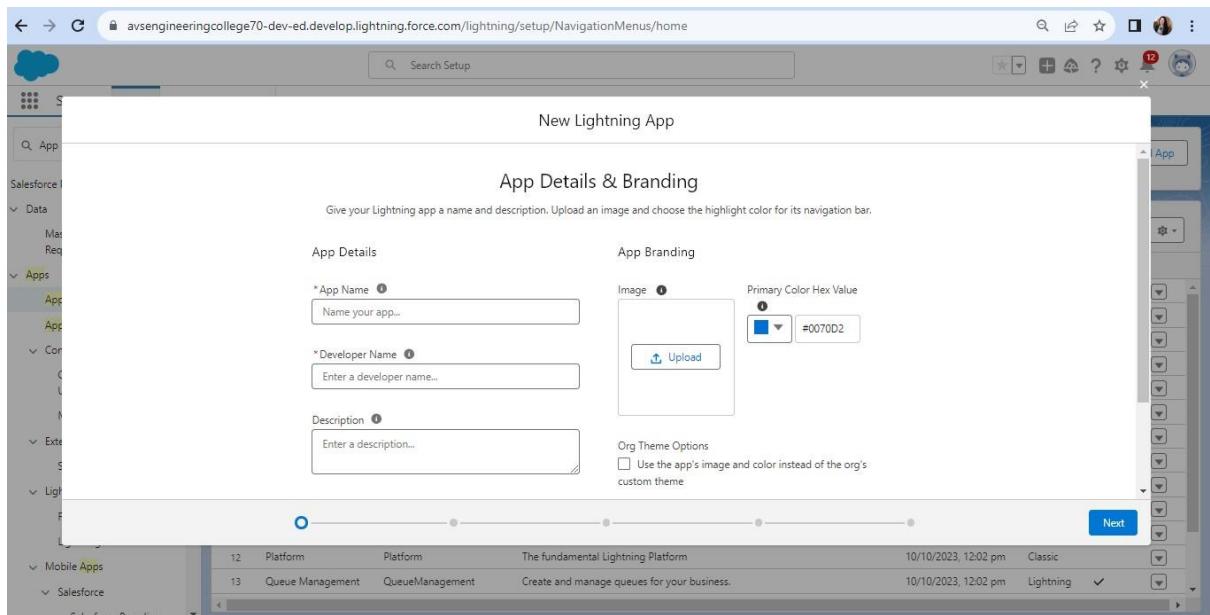
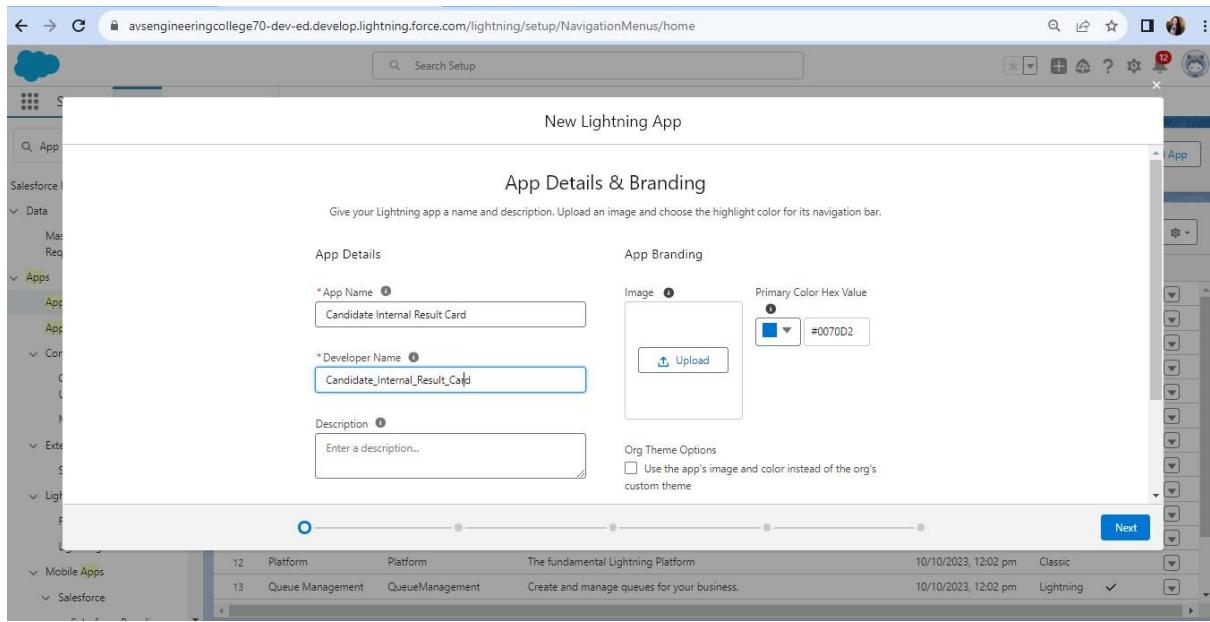
Enter a short description.

Description: (empty text area)

Buttons: Next, Cancel

## 2.3.LIGHTNING APP:





[avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home](https://avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home)

## New Lightning App

### Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Utility Bar: 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.

Add Utility Item

Back 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

This screenshot shows the 'Utility Items (Desktop Only)' configuration page. It includes a summary of the app's navigation style and setup options, with a progress bar indicating step 13 of 13 completed. The progress bar has three steps: 'Platform' (step 12), 'Platform' (step 13), and 'The fundamental Lightning Platform' (step 14).

[avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home](https://avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home)

## New Lightning App

### App Options

Navigation and Form Factor

\* Navigation Style: Standard navigation (selected)

\* Supported Form Factors: Desktop and phone (selected)

Setup and Personalization

Setup Experience: Setup (full set of Setup options) (selected)

App Personalization Settings

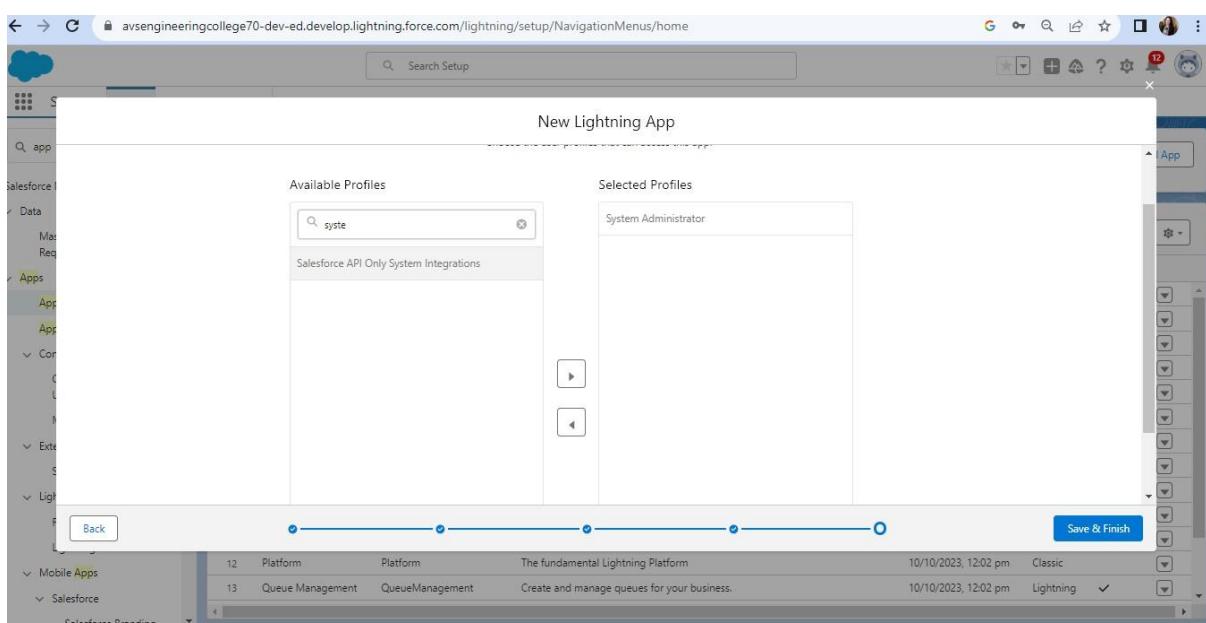
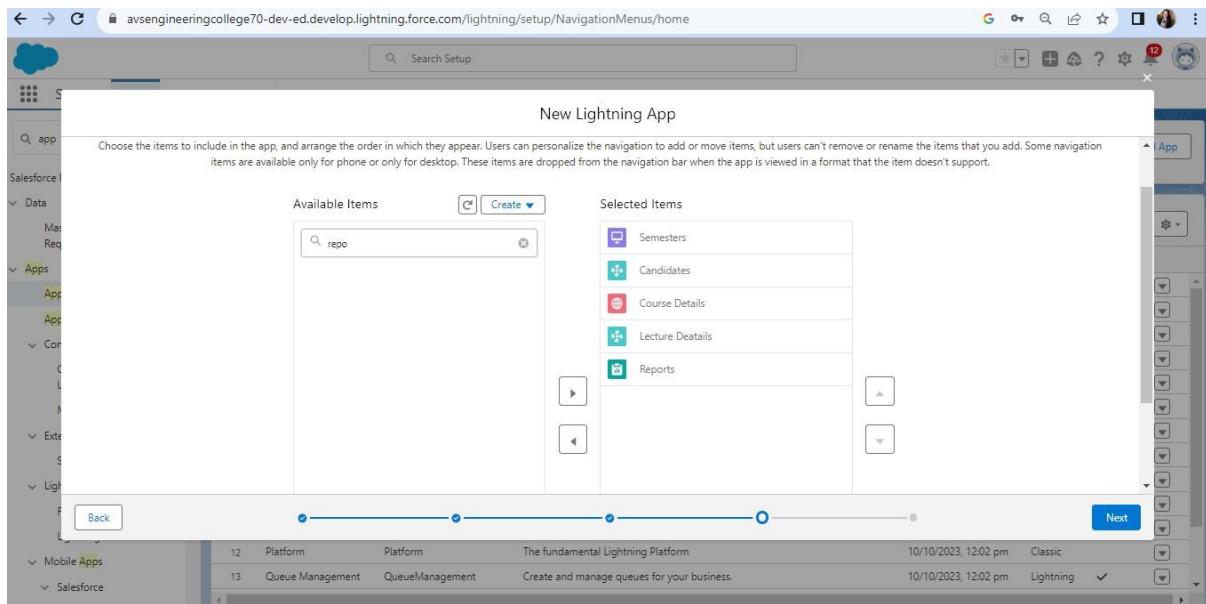
Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app

Back 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

This screenshot shows the 'App Options' configuration page. It includes the navigation and form factor settings, with a progress bar indicating step 13 of 13 completed. The progress bar has three steps: 'Platform' (step 12), 'Platform' (step 13), and 'The fundamental Lightning Platform' (step 14).



## 2.4.Field and Relationships:

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The page title is "Internal Result New Custom Field". On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Step 3. Enter formula" with a sub-instruction "Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions." A text input field contains "Candidate Roll Number (Text)". To the right, there's a "Functions" dropdown menu showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and an "Insert Selected Function" button.

The screenshot shows the Salesforce Object Manager home page. The title bar says "Object Manager". The main table displays one item: "Lecture Detail" (Label), "Lecture\_Detail\_\_c" (API Name), "Custom Object" (Type), and "19/10/2023" (Last Modified). The "DEPLOYED" column shows a checked checkbox. A search bar at the top right contains the text "lecture".

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lecture Detail	Lecture_Detail__c	Custom Object		19/10/2023	✓

avengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015g000003lzg7/FieldsAndRelationships/view

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecture Detail Name	Name	Text(80)		
Owner	OwnerId	Lookup(User/Group)		

avengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015g000003lzg7/FieldsAndRelationships/new

FIELD TYPE	DESCRIPTION
External Lookup Relationship	Creates a relationship between two objects or an external system without using standard database triggers and constraints.
Checkbox	Allows users to select a True (checked) or False (unchecked) value.
Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
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	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.

avengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003lzg7/FieldsAndRelationships/new

Setup Home Object Manager

### Lecture Detail

#### New Custom Field

Step 2 of 4

Field Label: Lecture Role

Length: 40 (highlighted with a red box)

Field Name: Lecture\_Role

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values  
 Treat "ABC" and "abc" as duplicate values (case insensitive)  
 Treat "ABC" and "abc" as different values (case sensitive)

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entry

avengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

### Object Manager

2 items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Candidate	Candidate_c	Custom Object		19/10/2023	✓
Candidate Course Detail	Candidate_Course_c	Custom Object		19/10/2023	✓

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER Candidate". On the left, a sidebar lists various configuration tabs: 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, and Restriction Rules. The "Fields & Relationships" tab is currently selected. The main content area displays the "Details" section for the Candidate object. It includes fields for API Name (Candidate\_\_c), Singular Label (Candidate), and Plural Label (Candidates). Other settings shown include "Enable Reports" checked, "Track Activities", and deployment status set to "Deployed".

The screenshot shows the "Fields & Relationships" section of the Candidate object configuration. The left sidebar has the "Fields & Relationships" tab selected. The main content area lists various field types with their descriptions:

- 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.
  - 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.
- Master-Detail Relationship:**
- External Lookup Relationship:** Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox:** Allows users to select a True (checked) or False (unchecked) value.
- Currency:** Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date:** Allows users to enter a date or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Date/Time:**
- Email:** Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation:** Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number:** Allows users to enter any number. Leading zeros are removed.

The screenshot shows the Salesforce Object Manager interface for the 'Candidate' object. The left sidebar is titled 'Fields & Relationships' and includes options like 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, and Restriction Rules. The main area is titled 'New Relationship' and 'Step 2. Choose the related object'. It displays a dropdown menu 'Related To' with 'Semester' selected. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the bottom.

The screenshot shows the Salesforce Object Manager interface for the 'Candidate' object. The left sidebar is titled 'Fields & Relationships' and includes options like 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, and Restriction Rules. The main area is titled 'Step 3. Enter the label and name for the lookup field' and 'Step 3 of 6'. It shows fields for 'Field Label' (Semester Name), 'Field Name' (Semester Name), 'Description', 'Help Text', 'Child Relationship Name' (Candidates), and checkboxes for 'Required' (unchecked), 'Always require a value in this field in order to save a record.', 'What to do if the lookup record is deleted?' (radio button selected for 'Clear the value of this field. You can't choose this option if you make this field required.'), 'Auto add to custom report type' (unchecked), and 'Add this field to existing custom report types that contain this entry' (checked). A 'Lookup Filter' section is also present. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the bottom.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Candidate New Relationship" and "Step 4 of 6". It displays a table for field-level security with columns for Field Label, Data Type, Field Name, and Description. The "Field Label" column shows "Semester Name", "Data Type" as "Lookup", "Field Name" as "Semester\_\_Name", and "Description" as "Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.". Below this is a table for selecting profiles, with columns for "Field-Level Security for Profile", "Visible" (checkbox), and "Read-Only" (checkbox). Several profiles are listed, including Analytics Cloud Integration User, Analytics Cloud Security User, Consumer, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, and Custom: Sales Profile. Most profiles have the "Visible" checkbox checked.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Object Manager" and shows a table of custom objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One item is listed: "Lecture Detail" with API name "Lecture\_Detail\_\_c", Type "Custom Object", Description "", Last Modified "19/10/2023", and Deployed status checked. A search bar at the top right contains "Lec".

[avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003lzg7/FieldsAndRelationships/new](https://avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003lzg7/FieldsAndRelationships/new)

Lecture Detail  
New Custom Field

Step 1

Step 2

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail 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.

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.

[avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003lzg7/FieldsAndRelationships/new](https://avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003lzg7/FieldsAndRelationships/new)

Lecture Detail  
New Relationship

Step 2

Related To: Lecture Detail

avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000003lzg7/FieldsAndRelationships/new

Lecture Detail  
New Relationship

Step 3 of 6

Field Label: Lecture Detail

Field Name: Lecture\_Detail

Description:

Help Text:

Child Relationship Name: Lecture\_Details

Auto add to custom report type:  Add this field to existing custom report types that contain this entry

Lookup Filter

Optional: create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

avseengineeringcollege70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Object Manager

2 Items, Sorted by Label

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	✓

**Internal Result**

**New Custom Field**

**Step 1. Choose the field type**

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.

**Course Detail**

**New Custom Field**

**Step 2. Enter the details**

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:	0
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

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

**Course Detail**  
**New Custom Field**

**Step 2. Enter the details**

Field Label: Duration

Length: 1

Decimal Places: 0

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

**Internal Result**  
**New Custom Field**

**Step 1. Choose the field type**

Data Type:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship

Select one of the data types below.

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.

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.

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.
- When a user creates a master record, all detail records are created 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.

The screenshot shows the Salesforce Object Manager page. At the top, there is a search bar labeled "Search Setup". Below the header, the "Object Manager" tab is selected. A message indicates "1 items, Sorted by Label". The main table lists one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Internal Result	Internal_Result__c	Custom Object		19/10/2023	✓

The screenshot shows the "Step 2. Choose output type" configuration screen for the "Candidate Roll Number" field. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main panel shows the following configuration:

- Field Label:** Candidate Roll Number
- Field Name:** Candidate\_Roll\_Number
- Formula Return Type:** Text (selected)
- Notes:** Examples for Text type fields include:
  - Calculate a boolean value: Example [TODAY() > CloseDate]
  - Calculate a dollar or other currency amount and automatically format the field as a currency amount: Example [Gross Margin = Amount - Cost\_\_c]
  - Calculate a date, for example, by adding or subtracting days to other dates: Example [Reminder Date + CloseDate - 7]
  - Calculate a datetime, for example, by adding a number of hours or days to another datetime: Example [Next = NOW() + 1]
  - Calculate a numeric value: Example [Fahrenheit = 1.8 \* Celsius\_\_c + 32]
  - Calculate a percent and automatically add the percent sign to the number: Example [Discount = (Amount - Discounted\_Amount\_\_c) / Amount]
  - Create a text string, for example, by concatenating other text fields: Example [Full Name = LastName \$& FirstName]
  - Calculate a time, for example, by adding a number of hours to another time: Example [End Time = Start Time + 32]

# CHAPTER-3

## USERS & DATA SECURITY

### 3.1 User Creation & Setup Approvals

The screenshot shows the Salesforce Lightning interface with the URL [avseengineeringcollege70-dev-ed.lightning.force.com/lightning/o/Course\\_Detail\\_c/list?filterName=Recent](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/o/Course_Detail_c/list?filterName=Recent). The page title is "Course Details". The navigation bar includes links for Candidate Internal ..., Semesters, Candidates, Course Details (selected), Lecture Details, Reports, and Internal Results. A search bar at the top right contains the placeholder "Search...". Below the navigation is a "Recently Viewed" section titled "Course Detail Name" with three items: 1. MBA, 2. ME, and 3. BE. To the right of the list is a toolbar with "New", "Import", and "Change Owner" buttons, and a "Search this list..." input field. A context menu is open over the third item (BE), showing options: "Edit", "Delete", and "Change Owner".

The screenshot shows the Salesforce Lightning interface with the URL [avseengineeringcollege70-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru). The page title is "Reports". The navigation bar includes links for Candidate Internal ..., Semesters, Candidates, Course Details, Lecture Details, Reports (selected), and Internal Results. A search bar at the top right contains the placeholder "Search...". Below the navigation is a "Recent" section titled "RECENT" with 0 items. To the left is a sidebar with categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). In the center, there is a decorative illustration of a desert landscape with a cactus, sun, and clouds. Below the illustration, text reads "Recent reports appear here. Go to All Reports to see what's available." and a "View All Reports" button.

The screenshot shows the Salesforce Lightning interface with the URL [avseengineeringcollege70-dev-ed.lightning.force.com/lightning/o/Course\\_Detail\\_c/list?filterName=Recent](https://avseengineeringcollege70-dev-ed.lightning.force.com/lightning/o/Course_Detail_c/list?filterName=Recent). The page title is "Course Details". The navigation bar includes links for Candidate Internal ..., Semesters, Candidates, Course Details (selected), Lecture Details, Reports, and Internal Results. A search bar at the top right contains the placeholder "Search...". Below the navigation is a "Recently Viewed" section titled "Course Detail Name" with 3 items: 1. MBA, 2. ME, and 3. BE. To the right of the list is a toolbar with "New", "Import", and "Change Owner" buttons, and a "Search this list..." input field.

## REPORTS & DASHBOARD

### 4.1.REPORTS:

The screenshot shows the 'Reports' section of the dashboard. At the top, there's a search bar and a navigation bar with links for Semesters, Candidates, Course Details, Lecture Details, Reports (which is currently selected), and Internal Results. Below the navigation is a table titled 'Recent' with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One item is listed: 'Candidate Internal Result Report' in the 'Private Reports' folder, created by Priya G on 20/10/2023 at 2:09 pm. To the left of the table is a sidebar with categories like 'Recent', 'Created by Me', 'Public Reports', 'All Reports', 'Folders', 'Shared with Me', and 'Favorites'.

The screenshot shows the 'Create Report' dialog box. The title is 'Create Report'. On the left, there's a sidebar with 'Category' sections: 'Recently Used' (with 'All' selected), 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', and 'Price Books, Products and Assets'. In the center, there's a search bar with 'sem' typed in, and a table titled 'Select a Report Type' with columns 'Report Type Name' and 'Category'. Three items are listed: 'Semesters' (Standard), 'Semesters with Semester' (Standard), and 'Candidates with Semester Name' (Standard). On the right, there's a 'Details' panel for the 'Semesters' report type, which includes a 'Start Report' button, a 'Fields (12)' section, and sections for 'Created By You' (No Reports Yet) and 'Created By Others' (No Reports Yet). There's also a 'Objects Used in Report Type' section with 'Owner' listed.

REPORT > New Semesters with Semester Report < Semesters with Semester

Fields > Groups > Course/Course Name

Columns > Duration, Semester: Semester Name, Semester: Semester Name

Save Report

\*Report Name: Events with Attendees

Report Unique Name: Events\_with\_Attendee\_BLP

Report Description:

Folder: Private Reports

Cancel Save

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	Properties with customer name report		Private Reports	Priya G	20/10/2023, 2:16 pm	<input type="checkbox"/>
Created by Me	Events with Attendees		Private Reports	Priya G	20/10/2023, 2:14 pm	<input type="checkbox"/>
Private Reports	Candidate Internal Result Report		Private Reports	Priya G	20/10/2023, 2:09 pm	<input type="checkbox"/>
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

## 4.2.DASHBOARDS:

The screenshot shows the 'Candidates Internal Results Card' dashboard in the Salesforce Lightning interface. The dashboard has a blue header with the title 'Candidates Internal Results Card'. Below the header, there are two sections: 'Related' and 'Details'. The 'Details' section contains the following information:

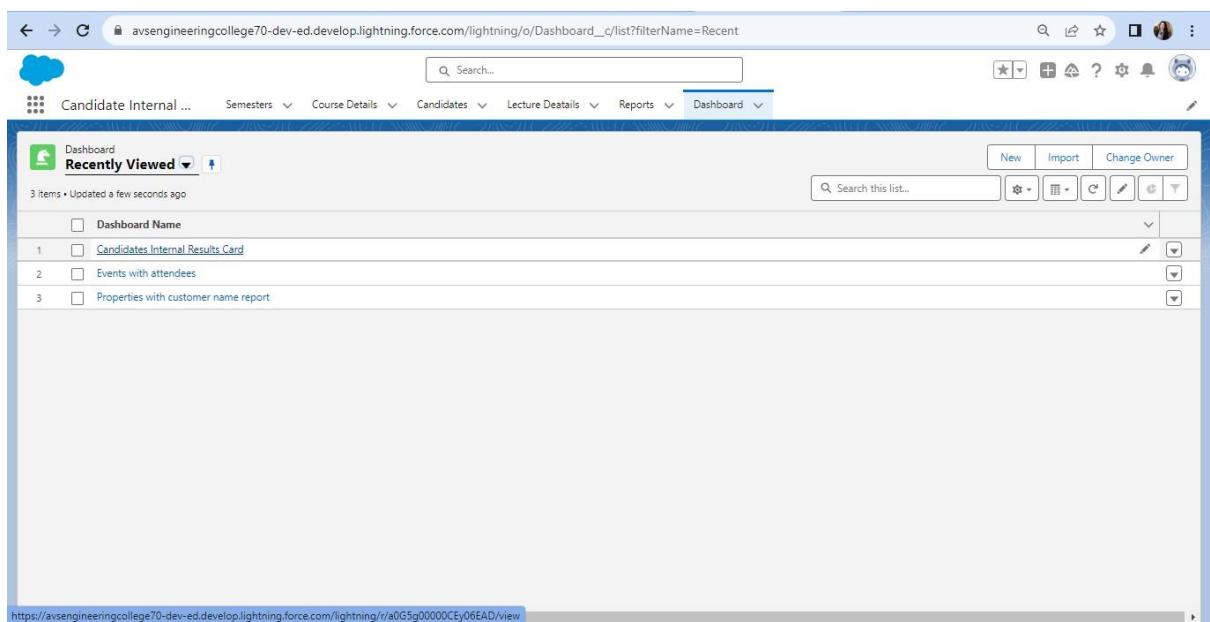
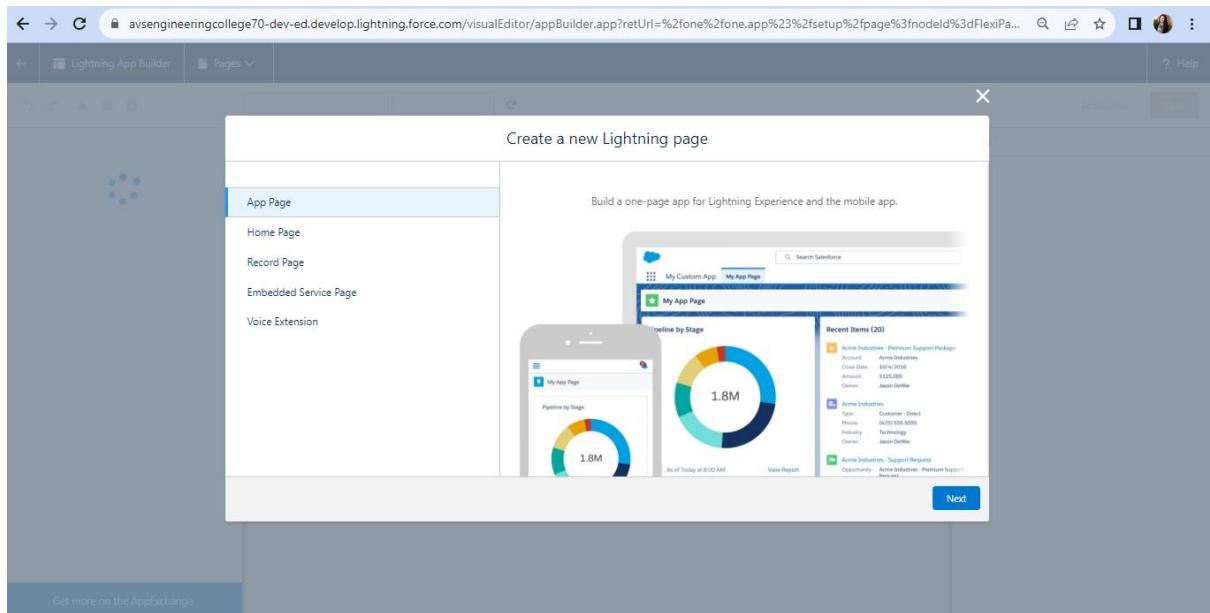
- Dashboard Name: Candidates Internal Results Card
- Owner: Priya G.
- Created By: Priya G., 20/10/2023, 2:33 pm
- Last Modified By: Priya G., 20/10/2023, 2:33 pm

The dashboard has a light blue background with a faint topographic map pattern.

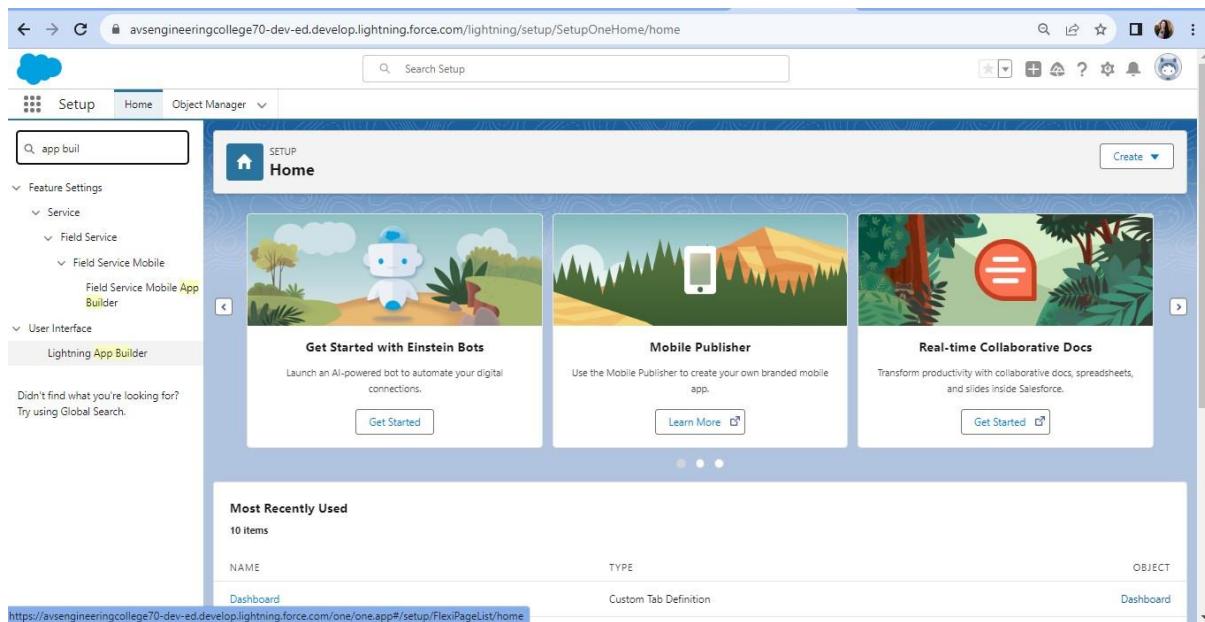
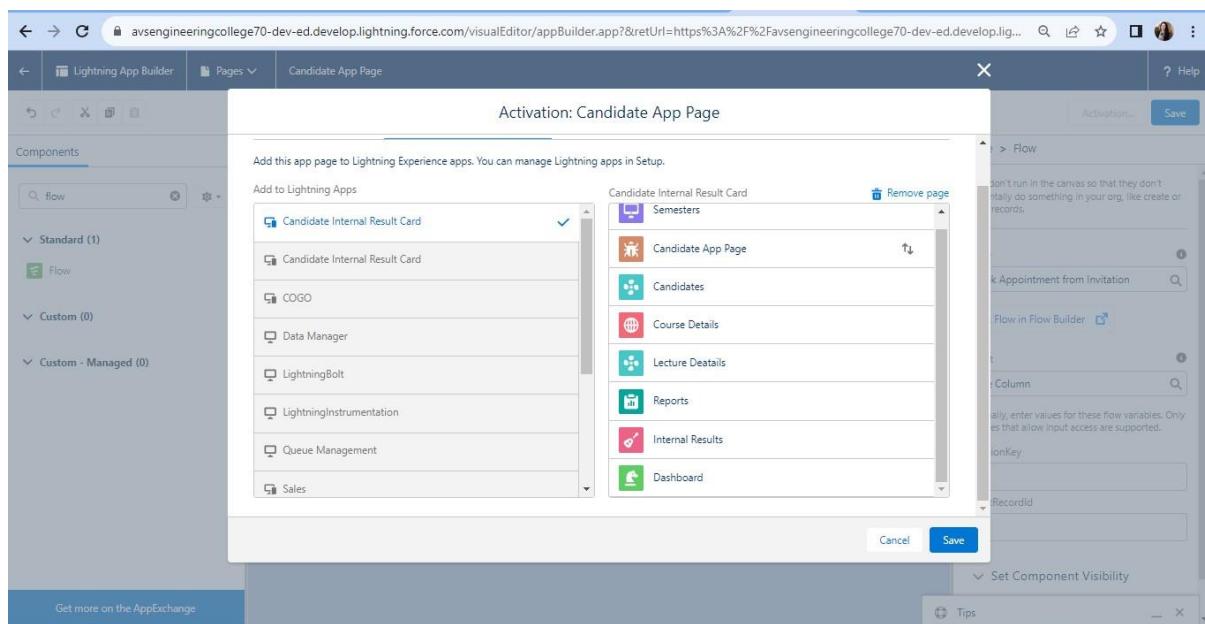
The screenshot shows the 'Events with attendees' dashboard creation dialog in the Salesforce Lightning interface. The dialog has a white header with the title 'New Dashboard'. Below the header, there is a section titled 'Information' containing the following fields:

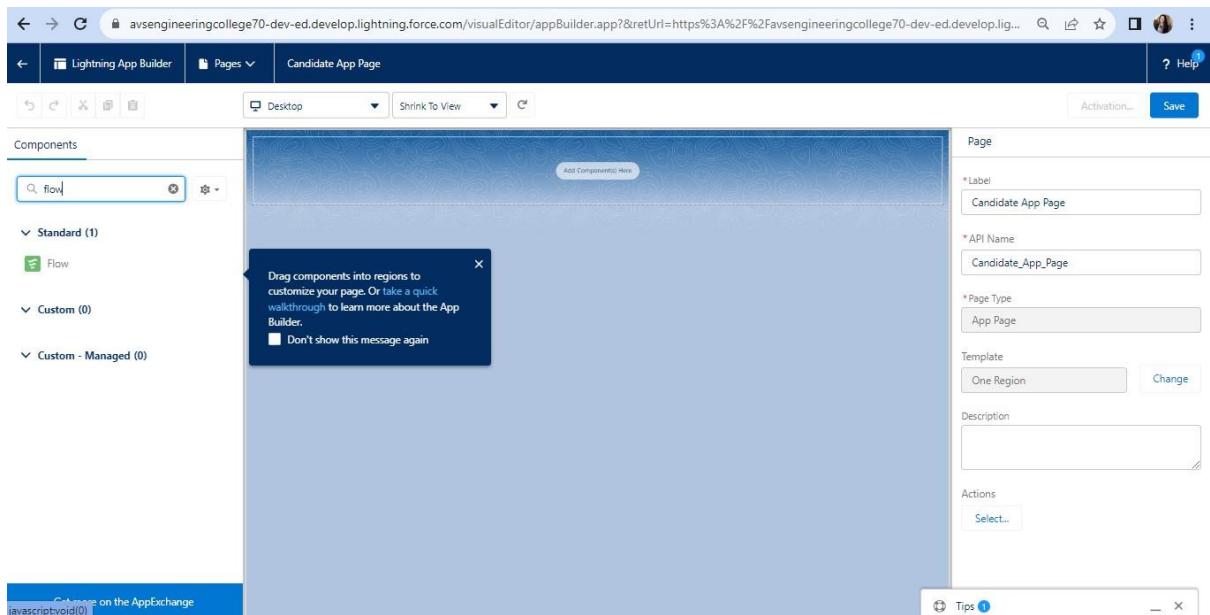
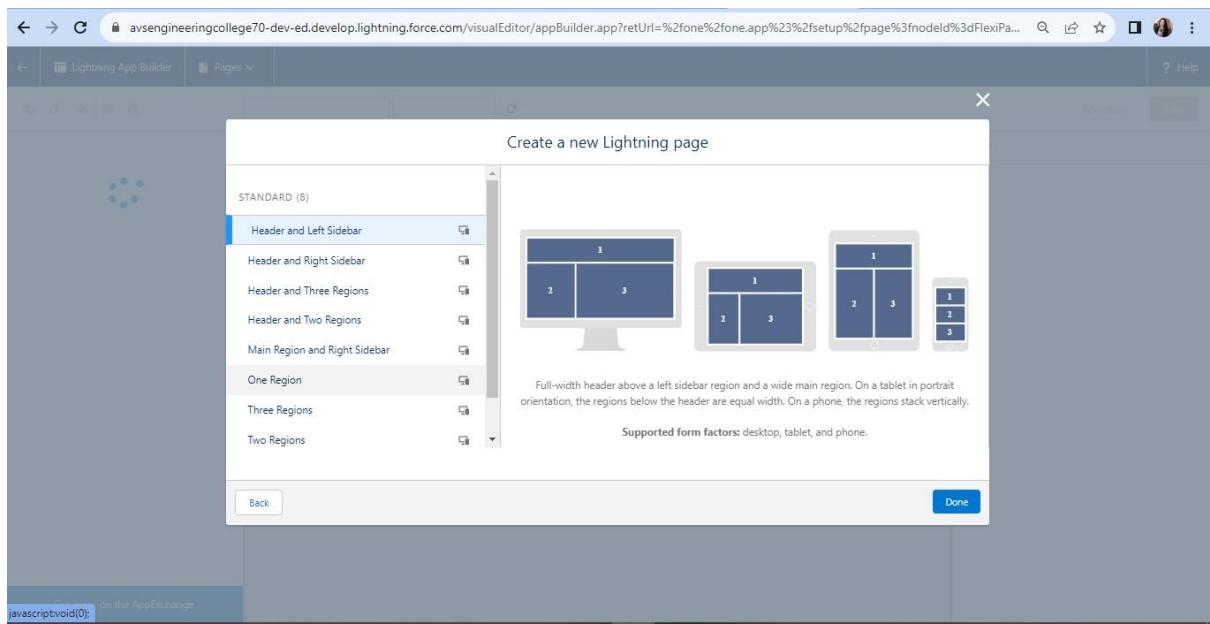
- \* Dashboard Name: Candidates Internal Results Card
- Owner: Priya G.

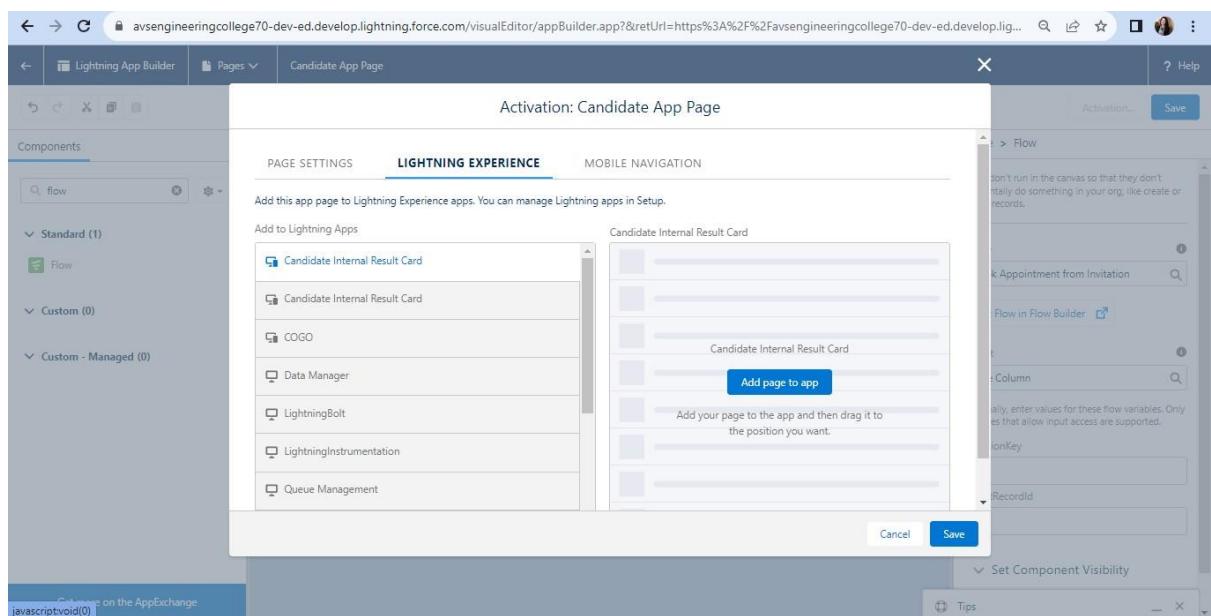
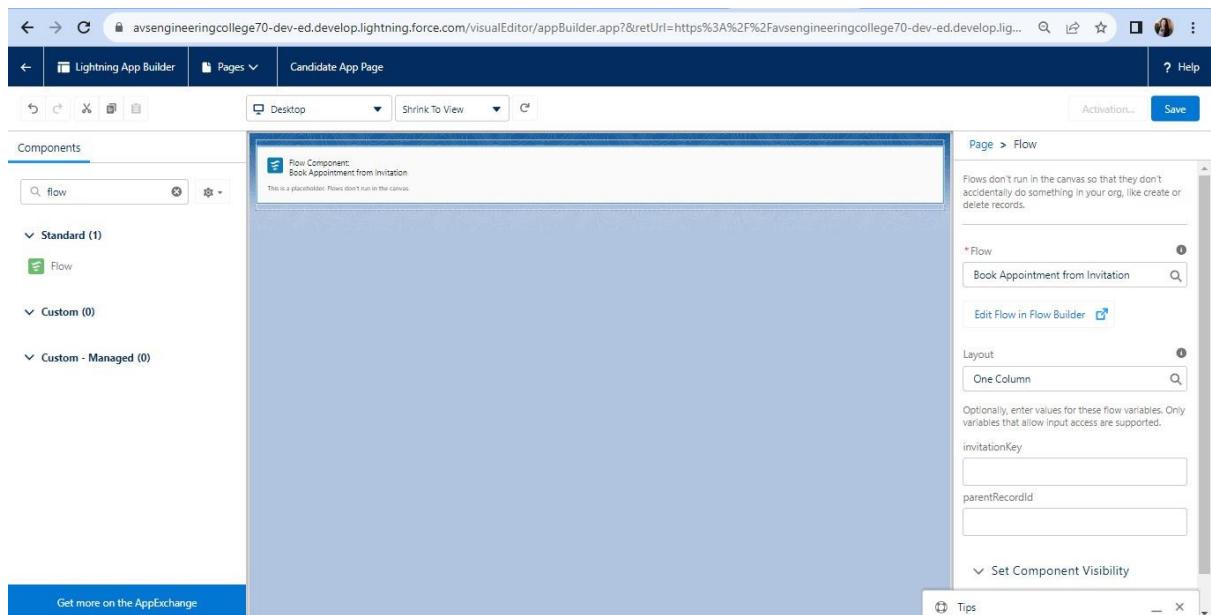
At the bottom of the dialog are three buttons: 'Cancel', 'Save & New', and 'Save'. The background of the dialog is white, while the rest of the screen is dark grey.



### 4.3.APPS:







## **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>**