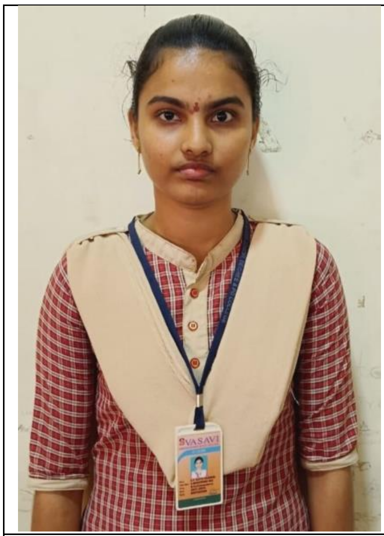
IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)

SMARTBRIDGE
Let's Bridge the Gap

MENTOR:Sri L.Laksmi Narayana

TEAMID:LTVIP2024TMID11744

	TEAMLEADER: **Name:KARRIVENATASATYAVASUDHA** **Emailid:vasuk.v.s1418@gmail.com** **Hallticketnumber:213887102036** **Register Number:SBAP0011744**
	**Teammember 1:** **Name:SAJJA LEELA LAVANYA** ***Email:*sajjasureshkumar445*@gmail.com*** **Hallticketnumber:213887102063** **Register Number:SBAP0011753**

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)

Teammember:2

Name:BHUSARAPU ANUSHA
Emailid:anushabhusarapu30@gmail.com
Hallticketnumber:213887102015
Register Number:SBAP0011756

Teammember:3

Name:ADDAGARLA TRIPURA VENKATA RAMADEVI
Emailid:srinuvasuaddagarla@gmail.com
Hallticketnumber:213887102008
Register Number:SBAP0011748

Teammember:4

Name:YARRAMSETTI VIDYASRI
Emailid:thotachodyasri@gmail.com
Hallticketnumber:213887102076
Register Number:SBAP0017579

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

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

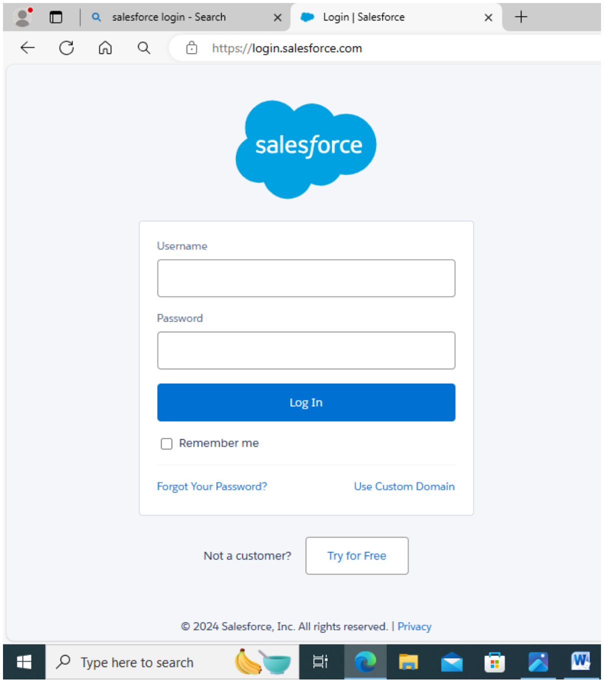
Task 1

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Creating Developer Org

Creating a developer org in salesforce.



1. Go to developers.salesforce.com/Signup

Task 2

Object

Salesforce objects are database tables that permit you to store data that is specific to an organization.Salesforce objects are of two types:

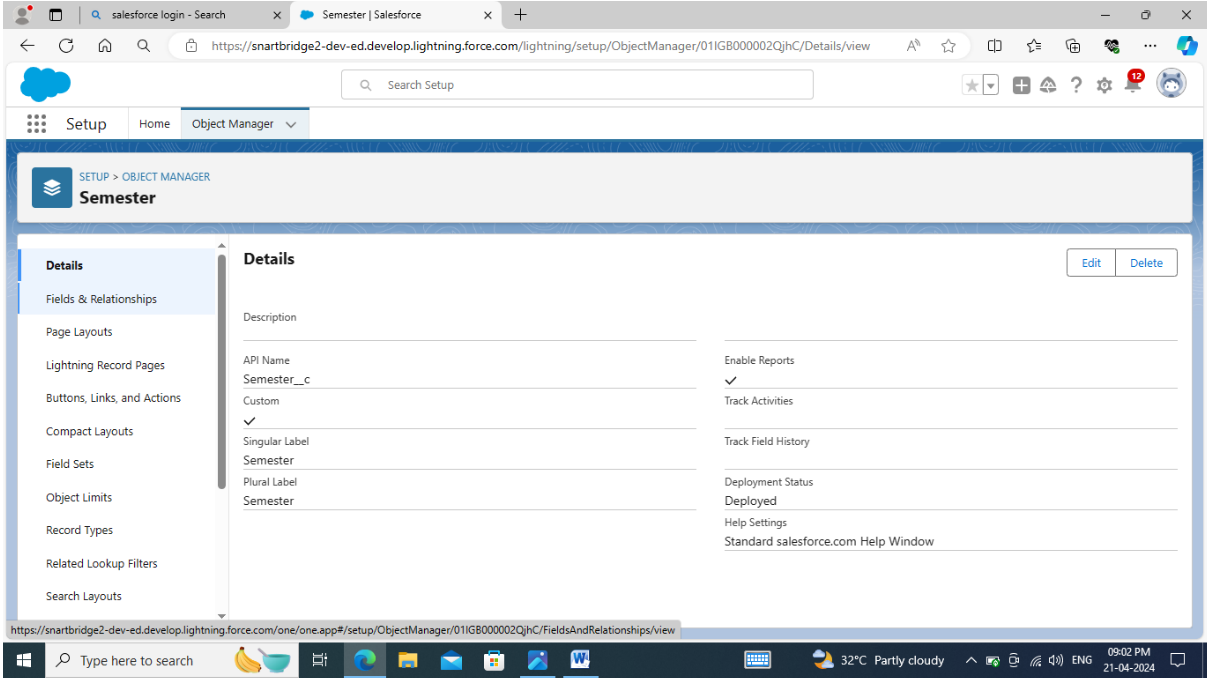
1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart ofany application and provide a structure for sharing data.

Creation Of Semester Object For Candidate Internal Result Card

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

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

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)



Task 3

What Is A Tab?

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and otherweb content in the application.

There are mainly 4 types of tabs:

(A) Standard Object Tabs: Standard object tabs display data related to standard objects

(B) Custom Object Tabs: Custom object tabs displays data related to custom objects.

(C) Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.

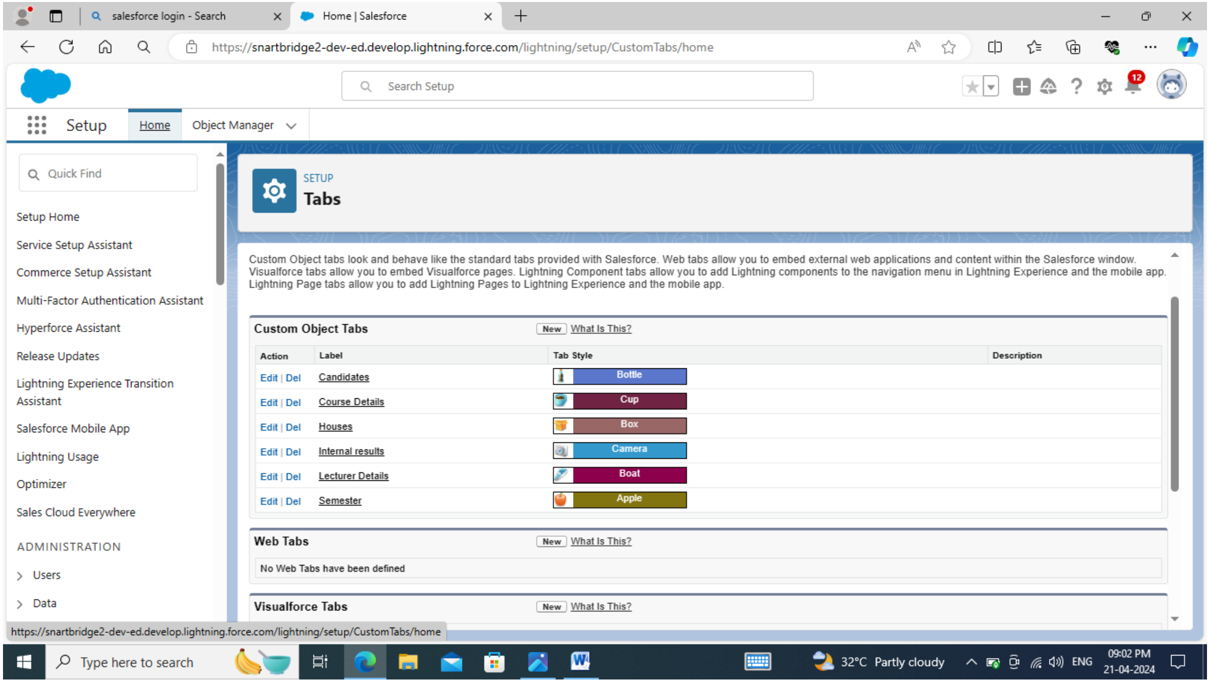
(D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

Creation Of Semester Tab For Candidate Internal Result Card

Now create a custom tab. Click the Home tab.

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

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)



Task 4

Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as aunit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs. There are two types of app –

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce chatter, App Launcher, etc are present in it.

Note: The description, Logo, and Label of standard app cannot be altered.

2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

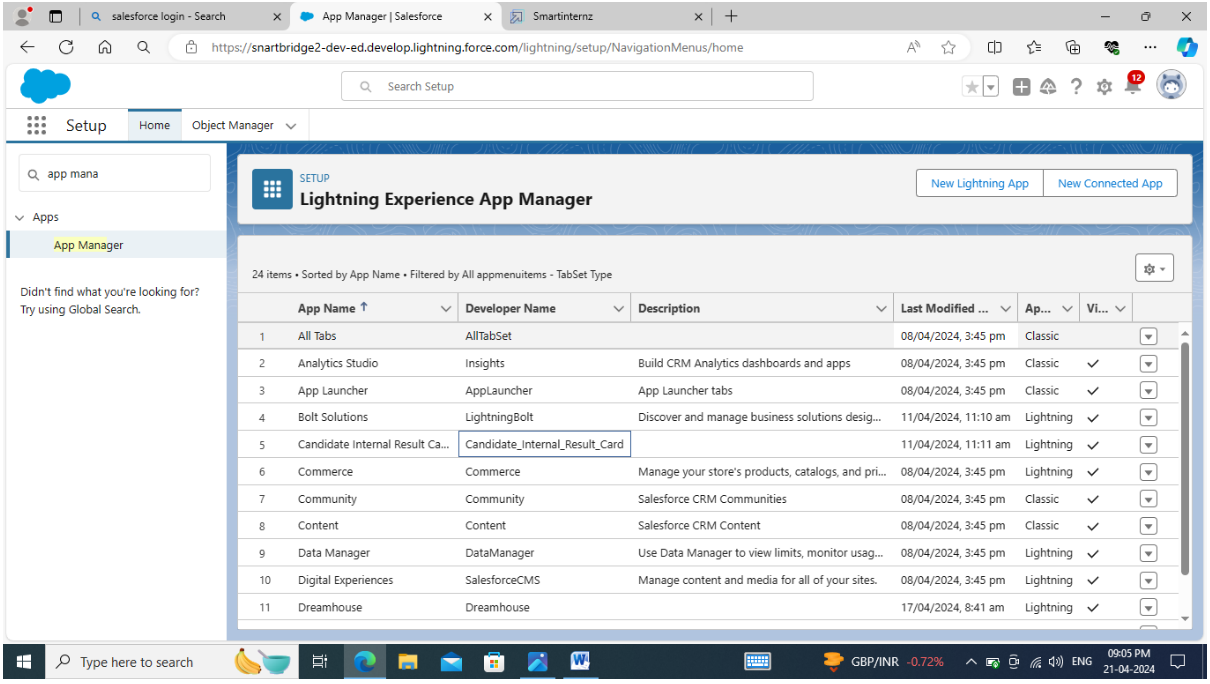
Note: Logos for Custom Apps can be changed.

Create The Candidate Internal Result Card App

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

From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)



Task 5

Fields And Relationship

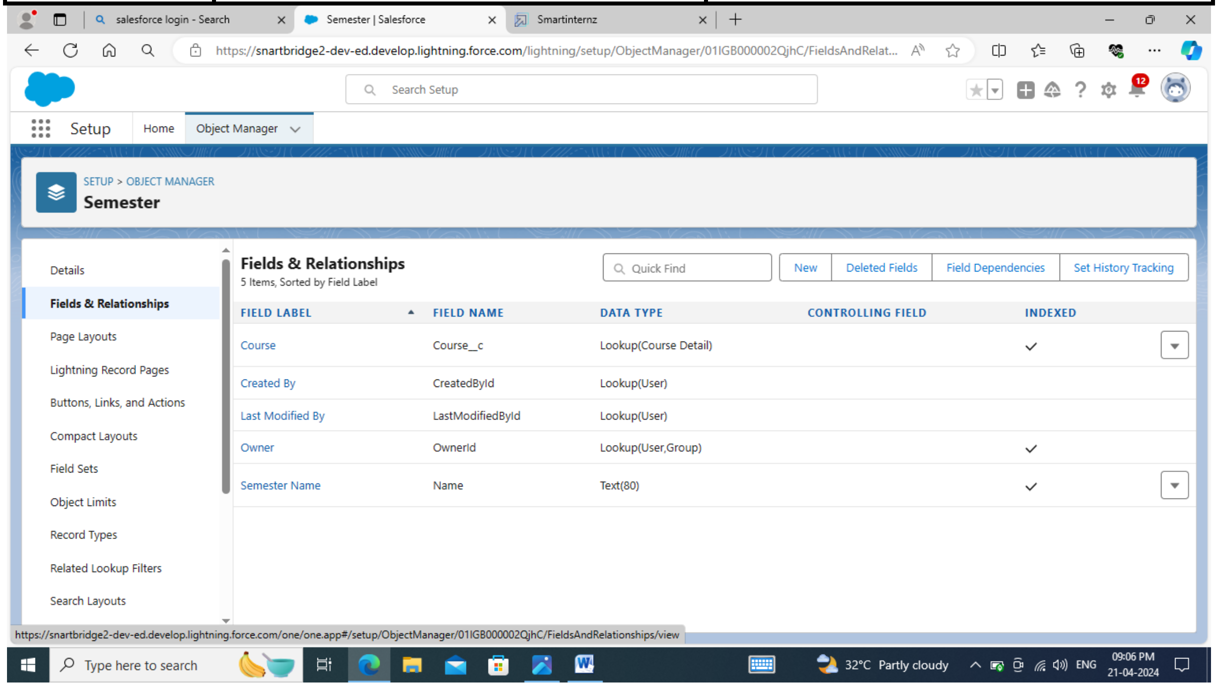
Fields - Fields store data values that are required for a particular object in a record.

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Object Name	Field Name	Data type
Semester	Semester Name	Text(Standard field)
	Course	Lookup(Course Details)
Candidate	Candidate Name	Text(Standard field)
	Candidate Roll Number	Auto Number
	Semester Name	Lookup(Semester)
Lecturer Details	Lecturer Name	Text(Standard field)
	Lecturer Role	Text
	Course	Lookup(Course Details)

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)

Course Details	Course Name	Text(Standard field)
	Duration (Years)	Number
Internal results	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	Lookup (Course detail)
	Marks	Number
	Status	Pick list Values: Pass Fail



Task 6

Users

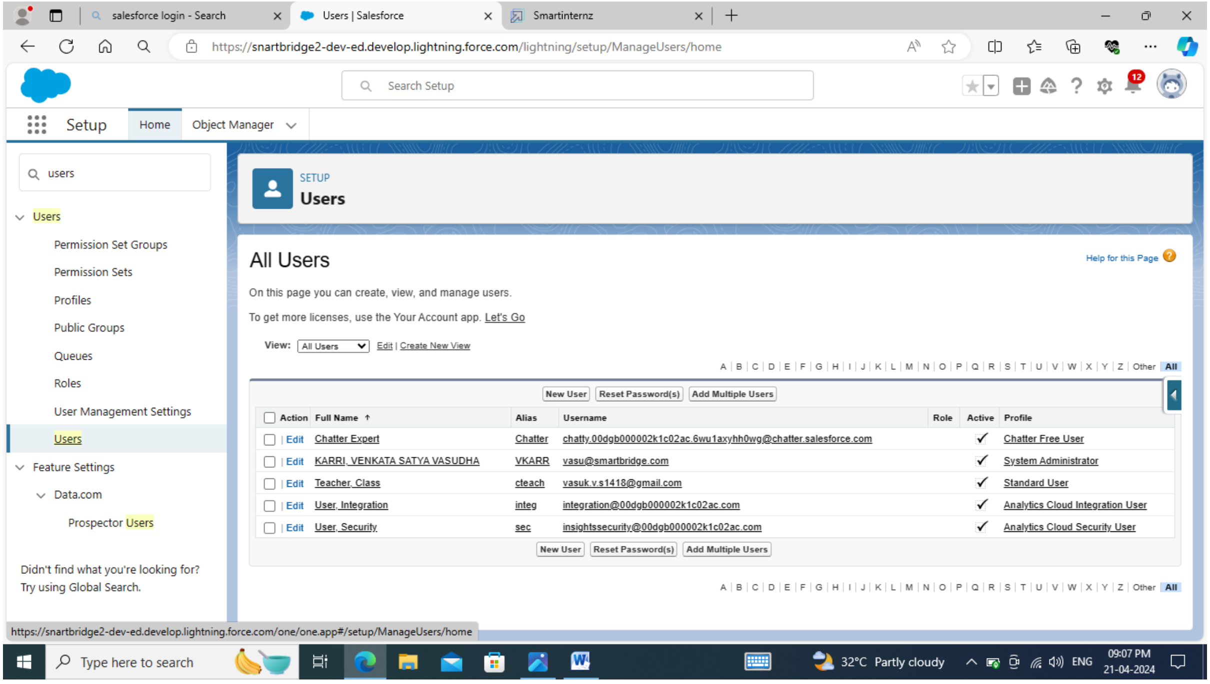
A user is anyone who logs in to Salesforce. Users are employees atyour company, such as sales reps, managers, and IT specialists, whoneed access to the company's records. Every user in Salesforce has auser account.

Creating A User

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

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)

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



Task 7

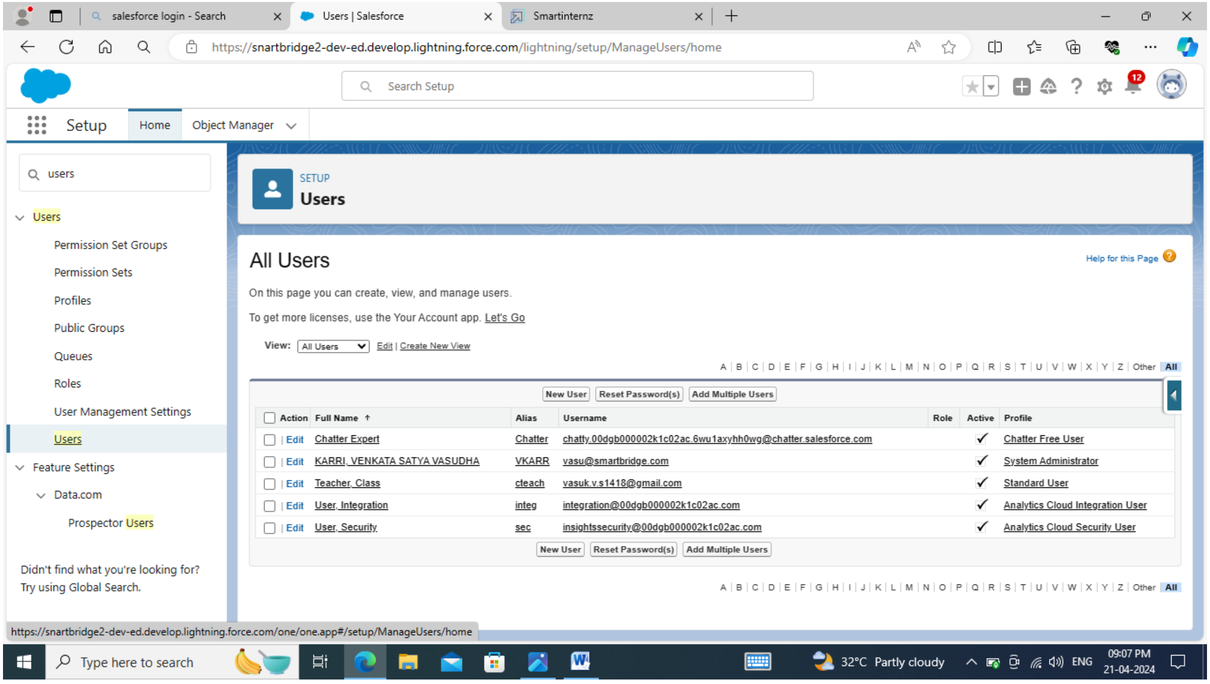
User Adoption

Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

Create Record (Course Details)

Create Records on Course Details Objects
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.
3. Click on Course Details tab.
4. Click new button
5. Fill all Course Details record details.
6. Click on Save Button.

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)



Task 8

What Are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answerto a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can’t be used to create groups of data or charts and also cannot beused in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal,and create charts.

Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

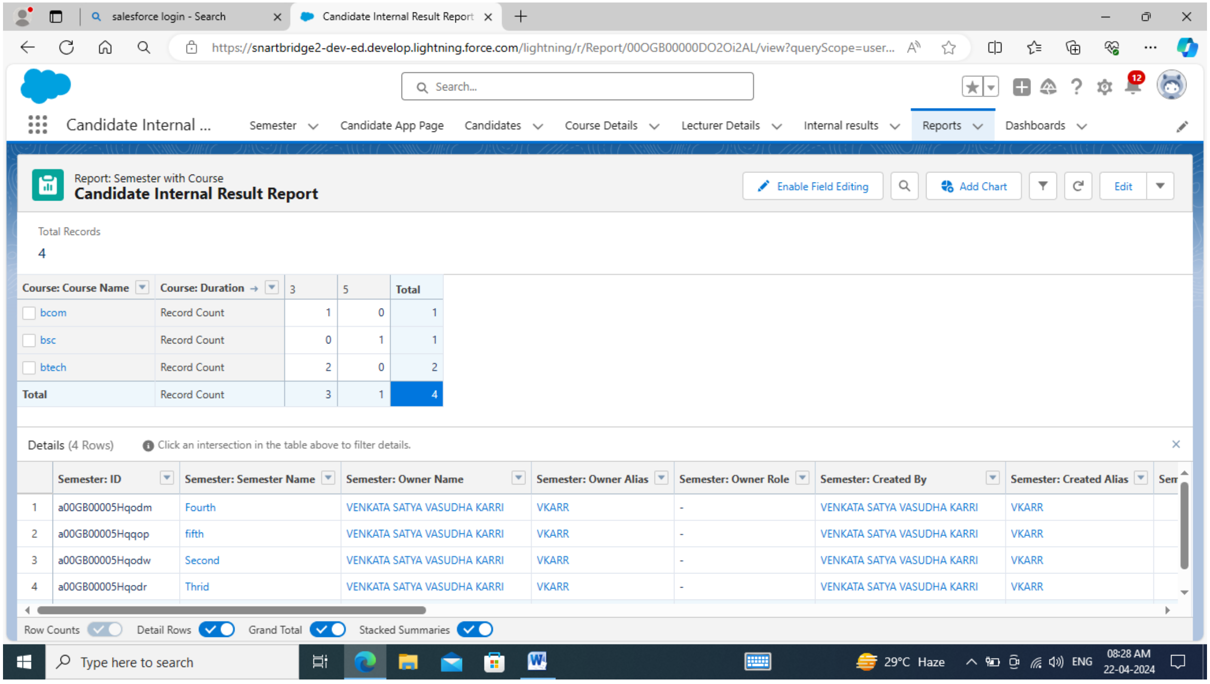
Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub-report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)

Create Report

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



Task 9

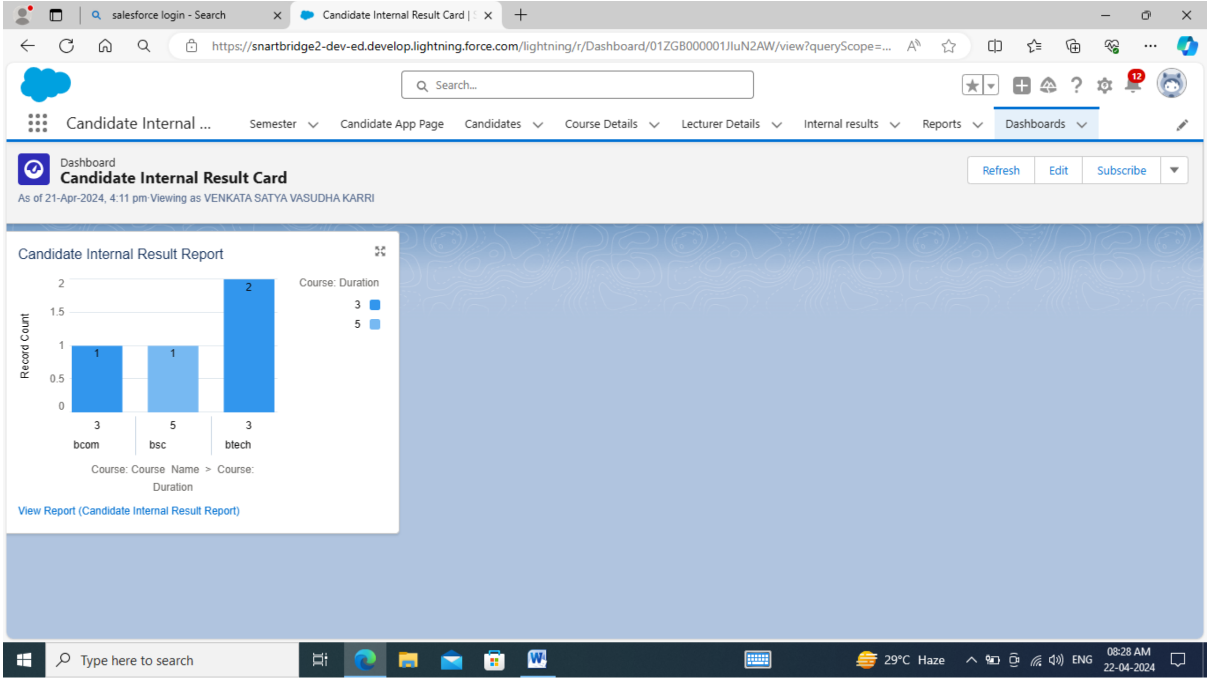
Dashboards

Dashboards let you curate data from reports using charts, tables,and metrics. If your colleagues need more information, then they'reable to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to asingle dashboard.

Create Dashboard

1. Click on Dashboards tab from the Candidate Internal Result Card application.
2. Click on new dashboard.
3. Give name- Candidate Internal Result Card
4. Click create

5. Give your dashboard a name and click on +component
6. Select the Candidate Internal Result Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.



Task 10

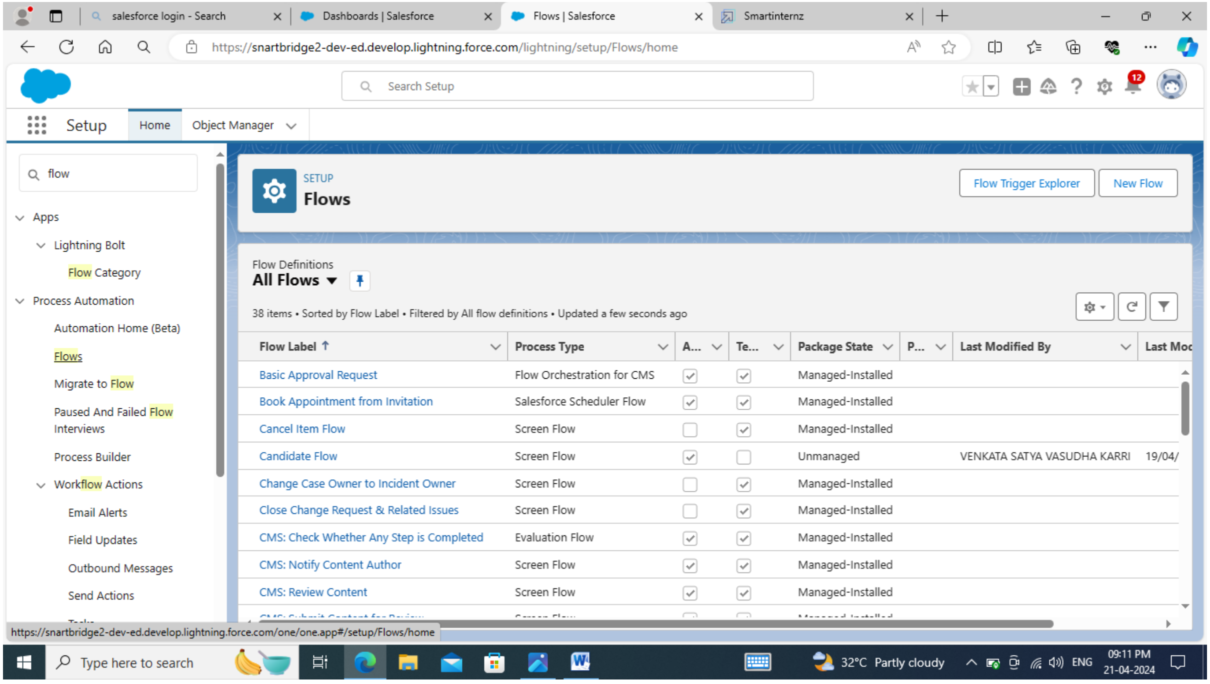
Screen Flow

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

Create A Screen Flow

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

3.Click on New flow and Select Screen flow



Task 11

App Page

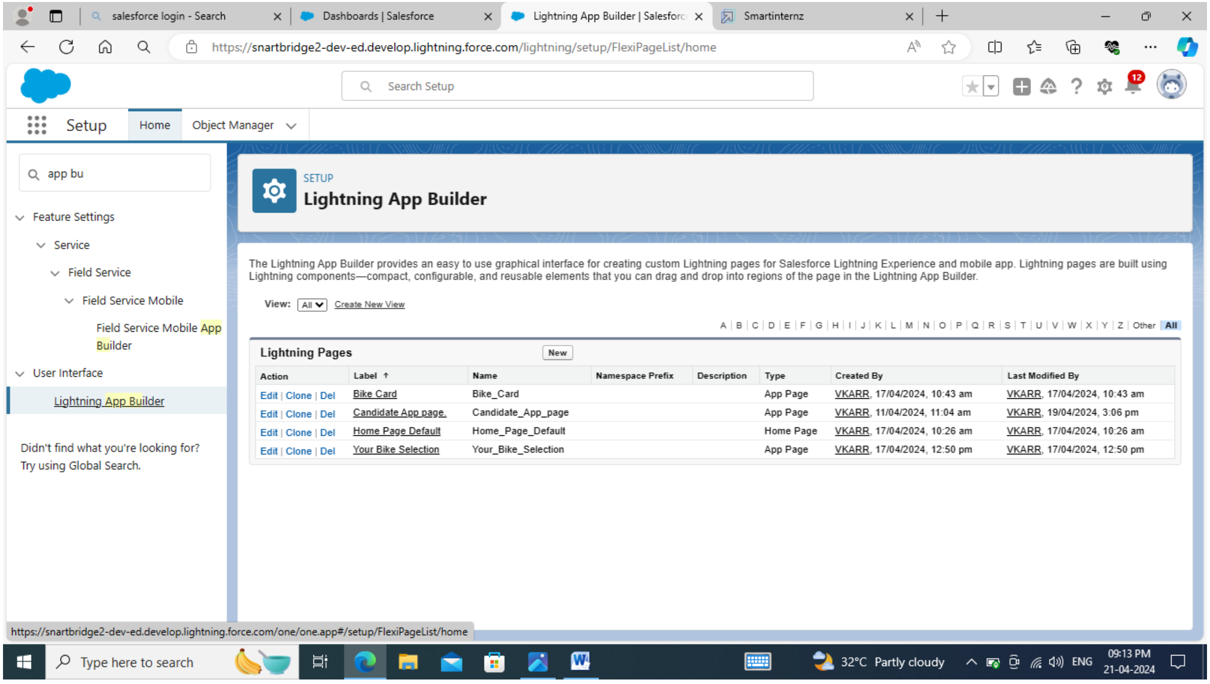
App page descriptions in Salesforce refer to the metadata and configuration settings that define the visual layout, functionality, and behavior of custom app pages within a Salesforce org. App pages are created using the Salesforce App Builder, which is a visual drag-and-drop tool that allows users to create custom pages without writing code.

Create An App Page

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

5. Give the label Name.
Label Name: Candidate App page.
6. Select the one region and click on finish.

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)



Task 12

Triggers

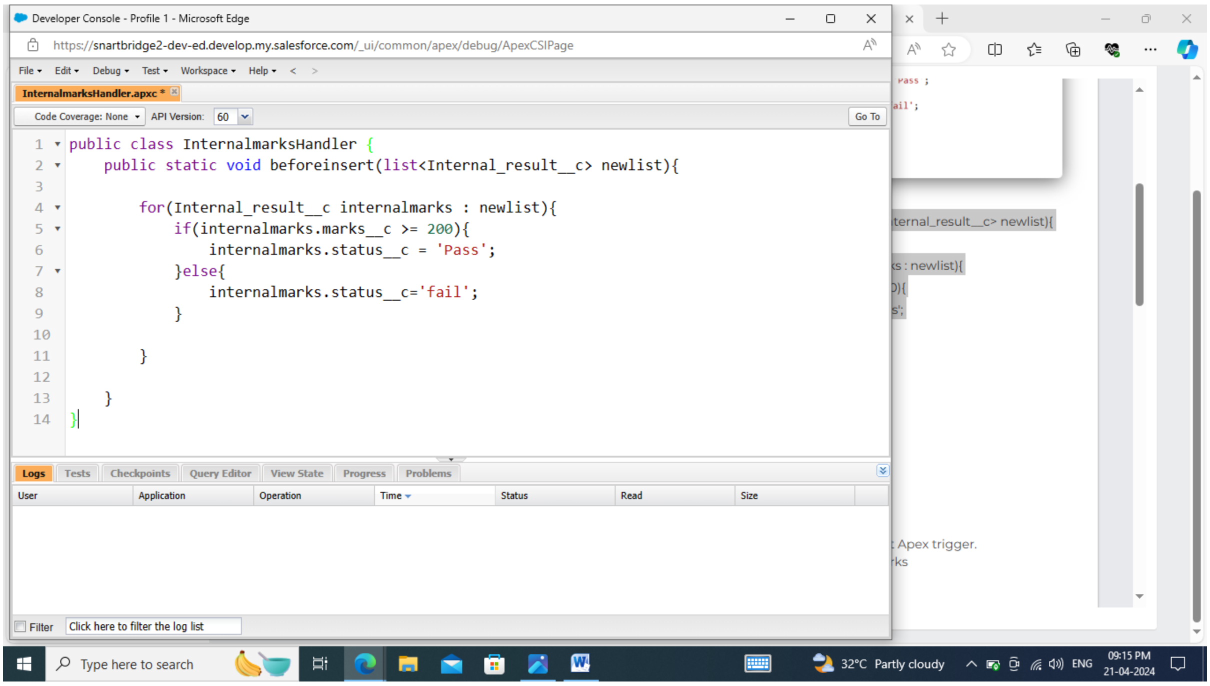
A trigger refers to an Apex code that is automatically executed before or after certain events occur in the Salesforce platform, such as when a record is inserted, updated, deleted, or undeleted. Triggers are used to automate business processes, enforce data integrity, and perform custom logic on data.

Field Update Using Trigger

Whenever a internal Marks is inserted if the marks is greater than or equal to 200 it must update the status field to Pass or else it must update to fail

1. Go to the gear icon and select the developer console.
2. From the menu bar click on file and select Apex class.
3. Now give the class name as InternalmarksHandler
4. Now Write the below code

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)



5. From the menu bar click on file and select Apex trigger.
6. Now give the trigger name as Internalmarks
7. Now write the below code

```
trigger Internalmarks on Internal_result__c(before insert,after update) {
    If(trigger.isInsert)
    {
        If(trigger.isBefore)
        {
            InternalmarksHandler.beforeinsert(Trigger.new);
        }
    }
}
```

8.Trigger Working as follows:
In the following record Marks field is given as 300,Now trigger triggers and status changes to Pass

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATE WTH INTERNAL MARKS(DEV)