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

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.

What you'll learn
Real Time Salesforce Project
Object & Relationship in Salesforce

Create Salesforce Org

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for

this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

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

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

https://youtu.be/r9EX3lGde5k

Creating Developer Org

Creating a developer org in salesforce.

1.

Go to developers.salesforce.com/Signup

2.
3.

Click on sign up.

4.
5.

On the sign-up form, enter the following details:

6.

1.

First name & Last name

2.

3.

Email

4.

5.

Role: Developer

6.

7.

Company: College Name

8.

9.

County: India

10.

11.

Postal Code: pin code

12.

13.

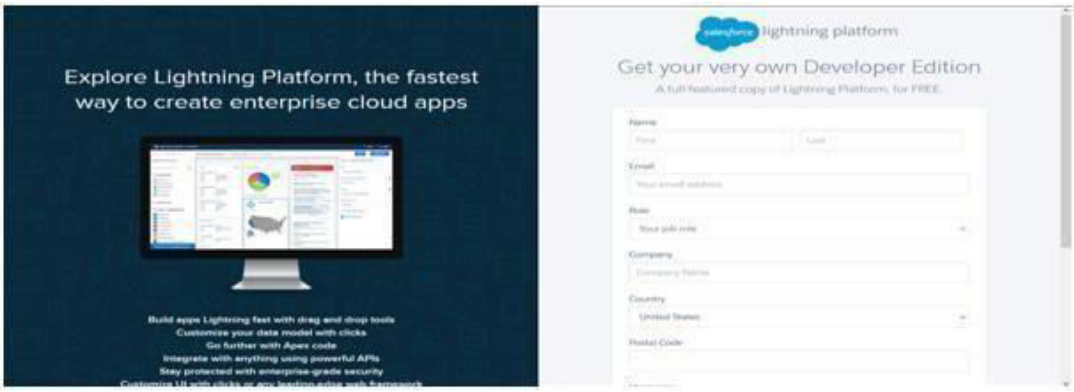
Username: should be a combination of your name and company

14.

This need not be an actual email id,
you can give anything in the

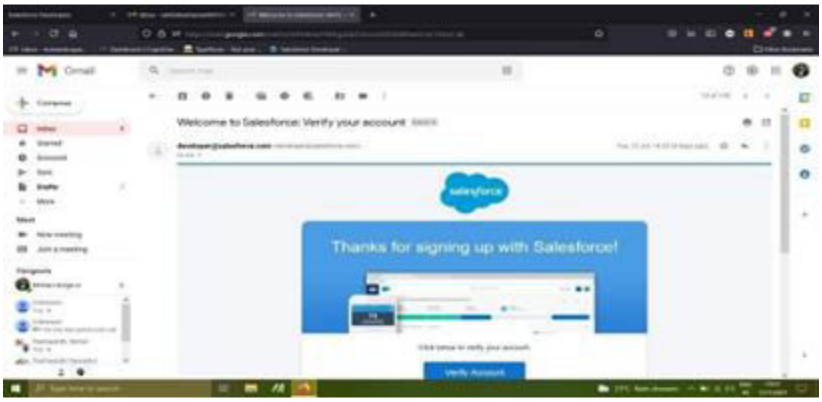
format: username@organization.co
m

Click on sign up after filling these.



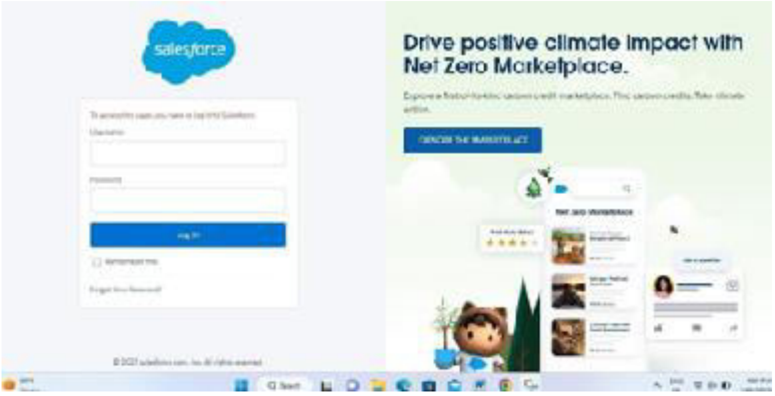
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login to Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Salesforce Login

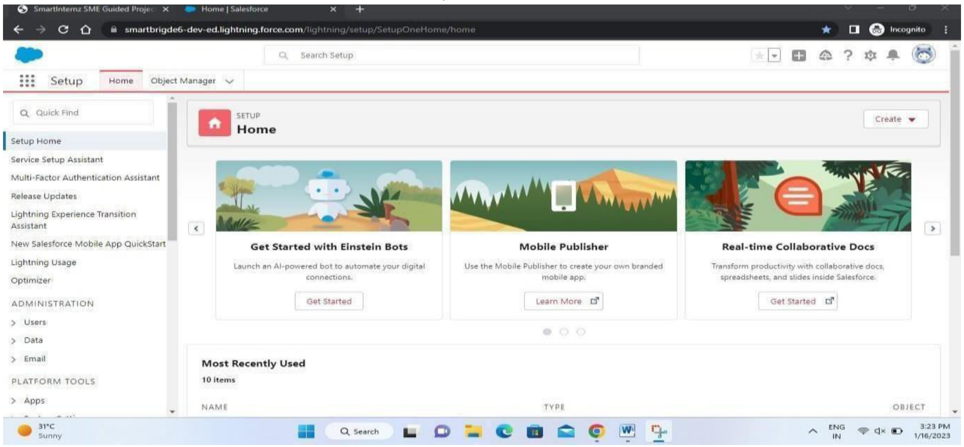
https://login.salesforce.com

Login to Your Salesforce Account

1. Go to salesforce.com and click on login.

2. Enter the username and password that you just created.

3. After login this is the home page which you will see.



Salesforce Login https://login.salesforce.com

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.

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.

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.

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 thatwhen 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)
Course Details	Course Name	Text(Standard field)

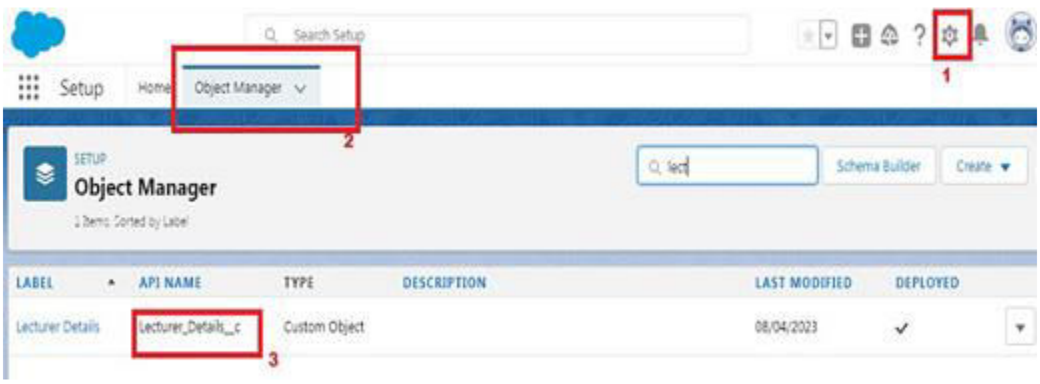
	Duration (Years)	Number

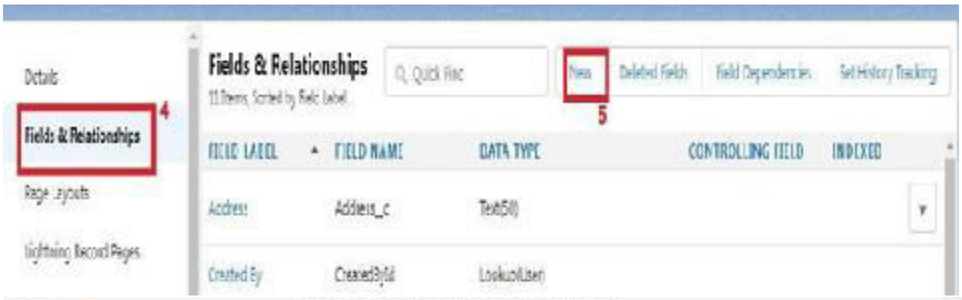
Internal results	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	Lookup(Course)
	Marks	Number

Creation Of Text Field On "Lecturer Details" & Look Up Field For The "Candidate" Object

1.Click the gear icon and select Setup. This launches Setup in a new tab.

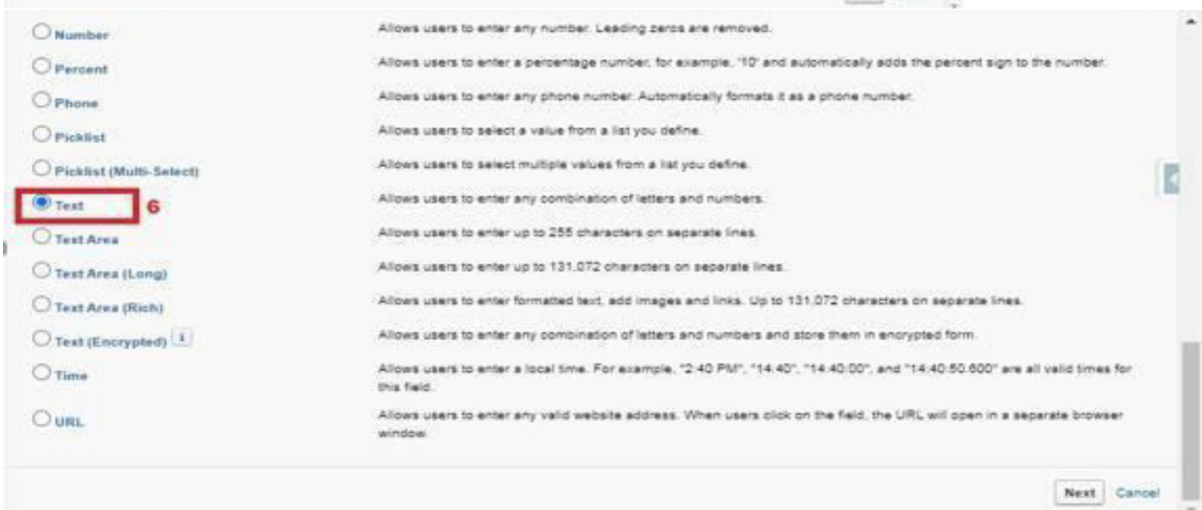
2. Click the Object Manager tab next to Home.
3. Select Lecturer Details
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click next.
7. For Field Label, enter Lecturer Role
8. Enter Length 40
9. Click Next, Next, then Save & New.

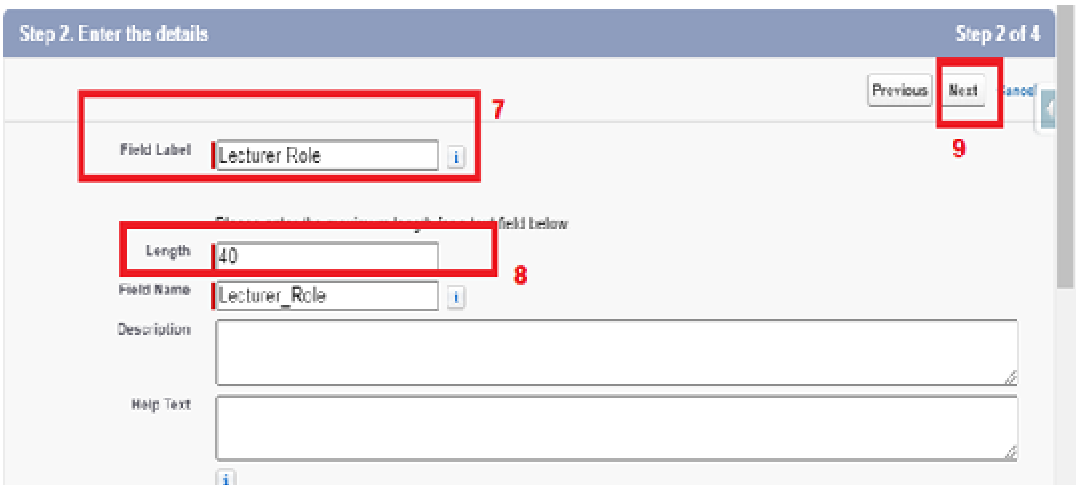



Details
Fields & Relationships
4
Page Layouts
Lightning Record Pages
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
5
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address_c
Text(50)
Created By
CreatedById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


6
Next
Cancel

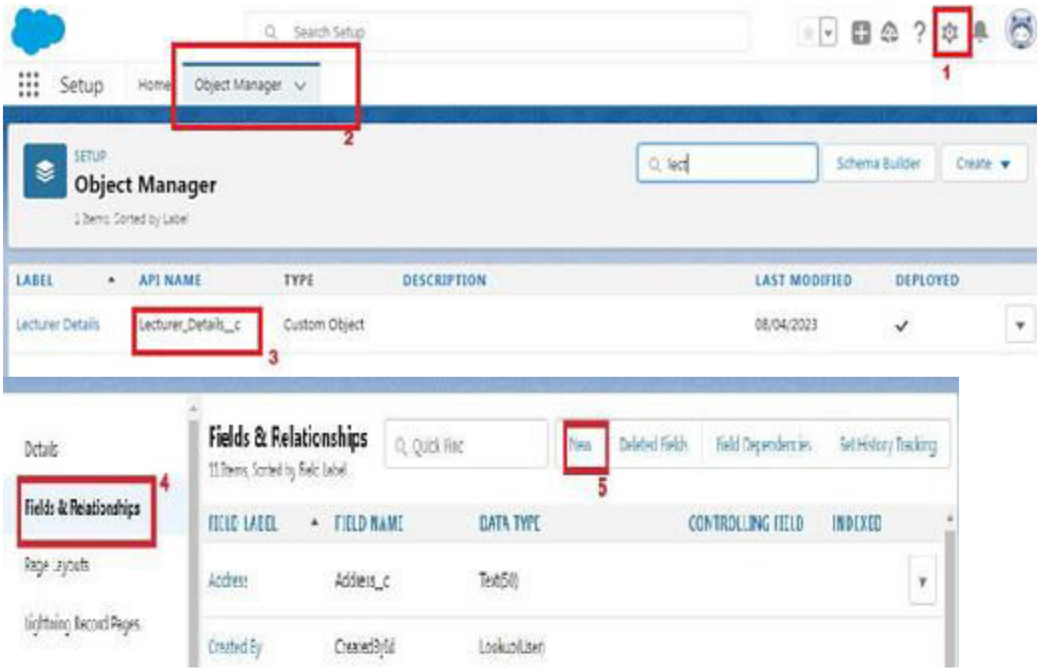

6
Next
Cancel


Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
6
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
Next
Cancel



Now Let's create a Lookup field on candidate object

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



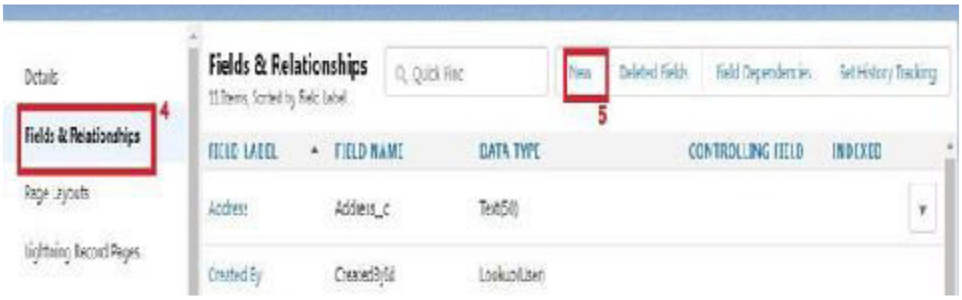
Note- Similarly create all lookup fields on their respective objects.

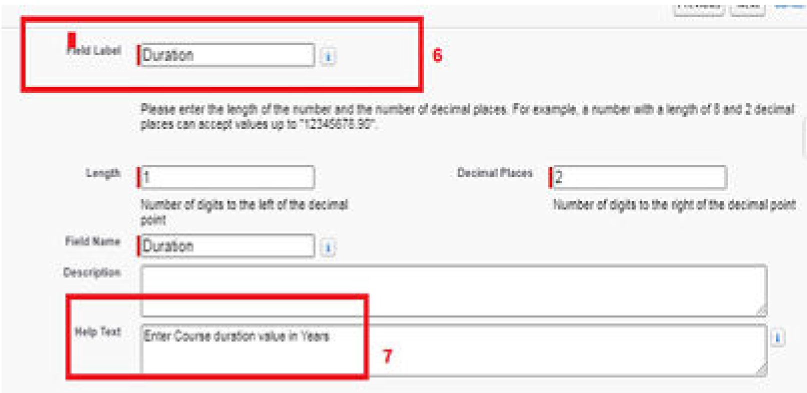
Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

Let's create a Number field on Course Details object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next
6. For Field Label Duration, enter.

7. Give Help Text- Enter Course duration value in Years
8. Click Next, Next, then Save & New.



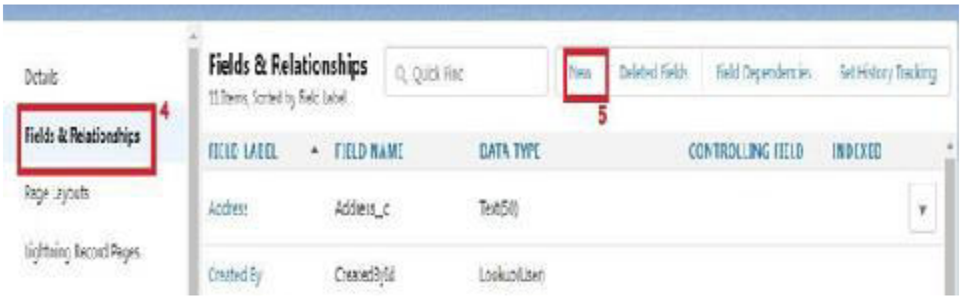


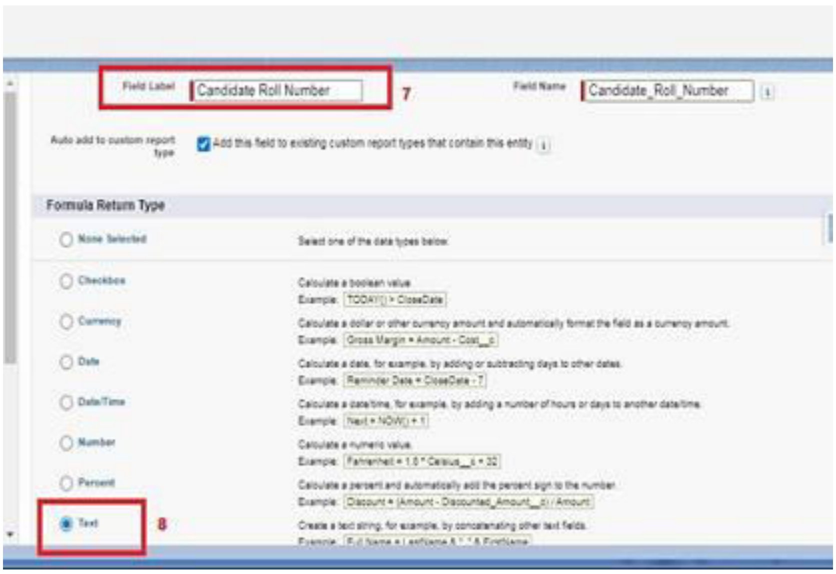
Now Let's create a Formula field on Internal Results object

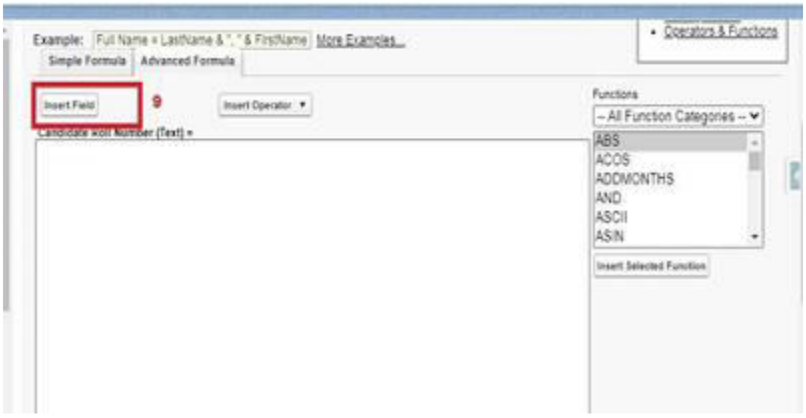
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Internal results.
4. Select Fields & Relationships from the left navigation.
5. Click New
6. Select the Formula as the Data Type, then click Next.
7. Give field label Candidate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

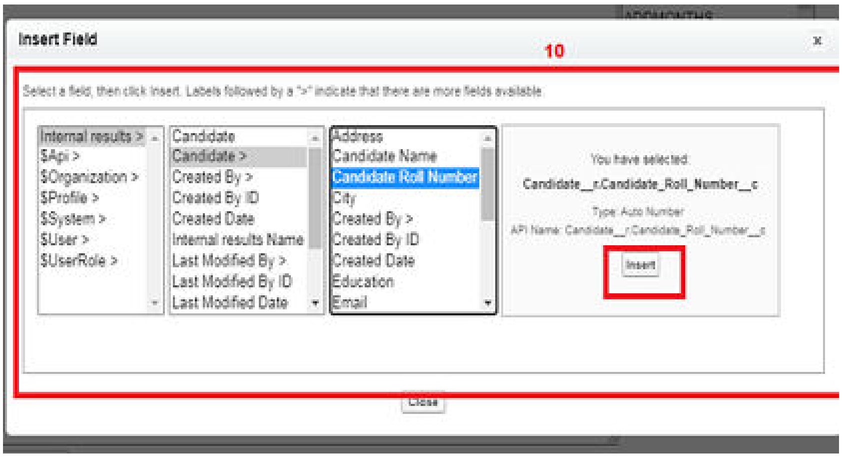
10.Create and insert formula Candidate r.Candidate_Roll_Number c, and then click Insert.

11.Click Next, Next, then Save.



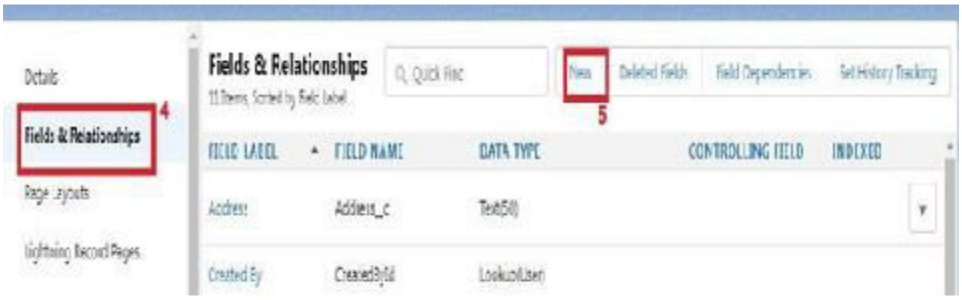


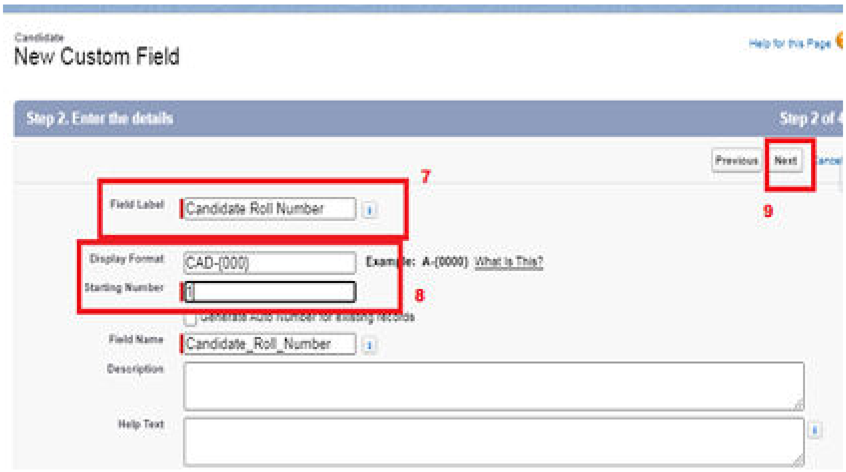




Now Let's create an auto number field on Candidate object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate enter Roll Number.
8. Give a display format
9. Click Next, Next, then Save & New.





Users

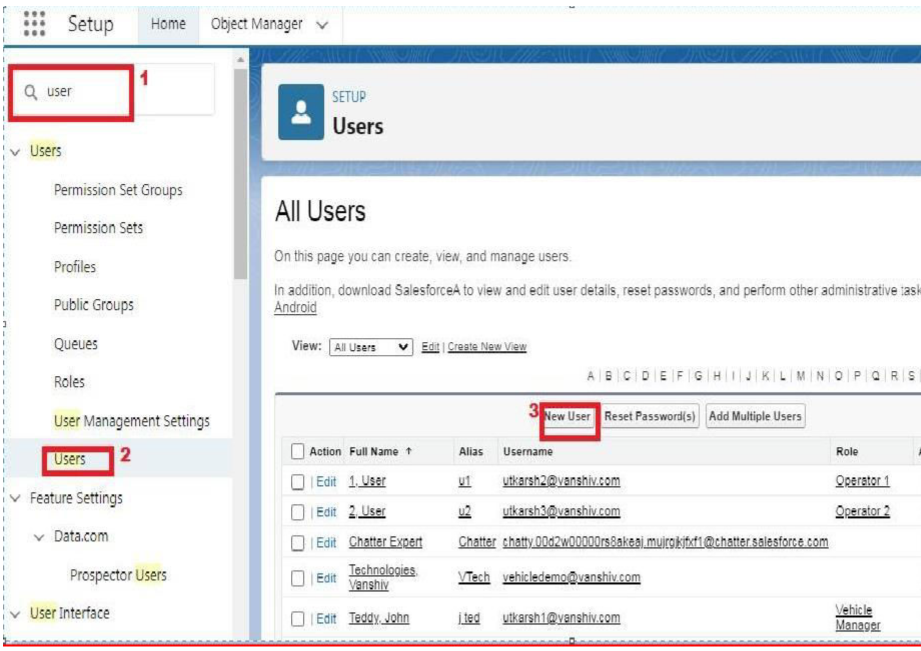
A user is anyone who logs in to Salesforce. Users are employees atyour company, such as sales reps, managers, and IT specialists, whoneed access to the company's records. Every user in Salesforce has auser account.

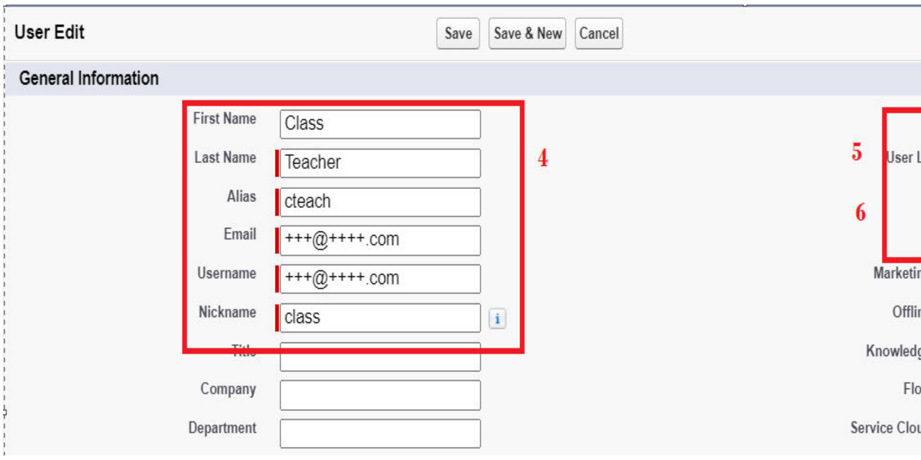
Creating A User

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.

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.





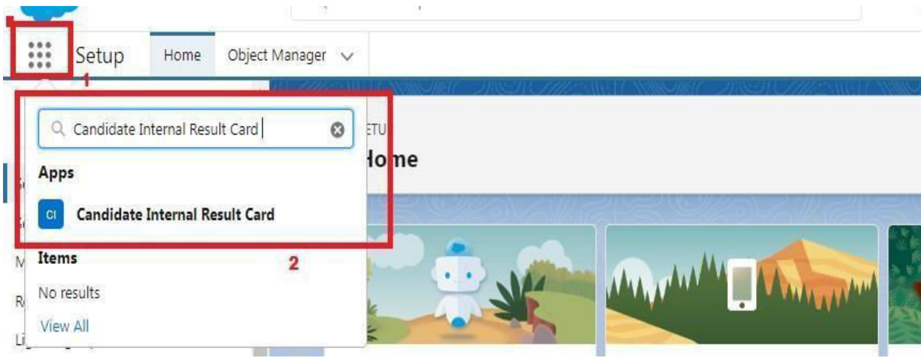
User Adoption

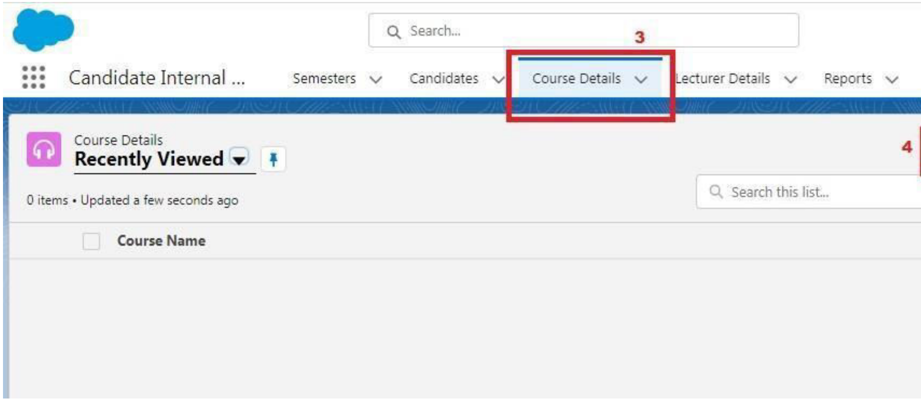
Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

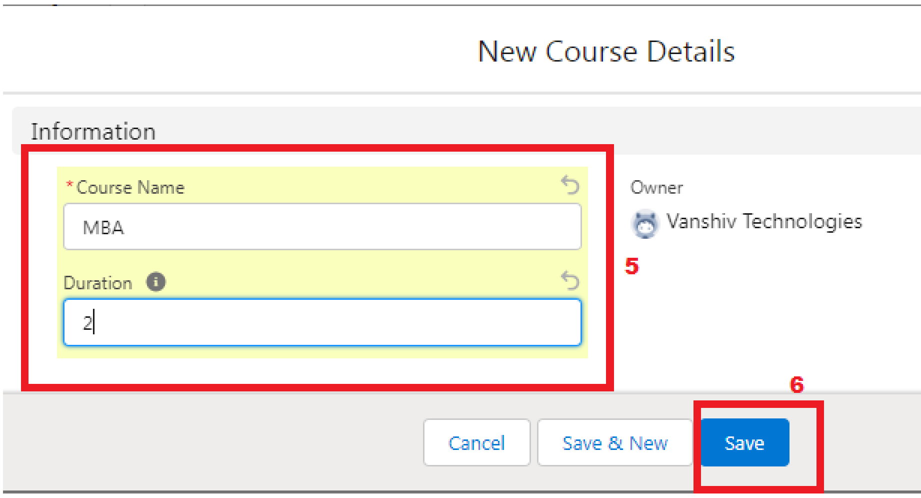
Create Record (Course Details)

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.



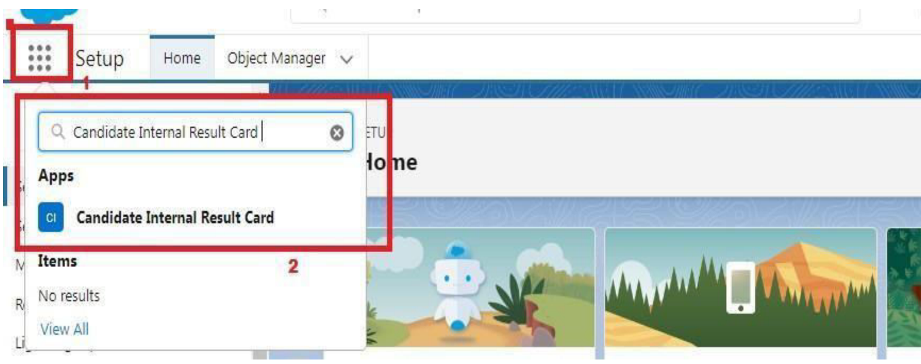


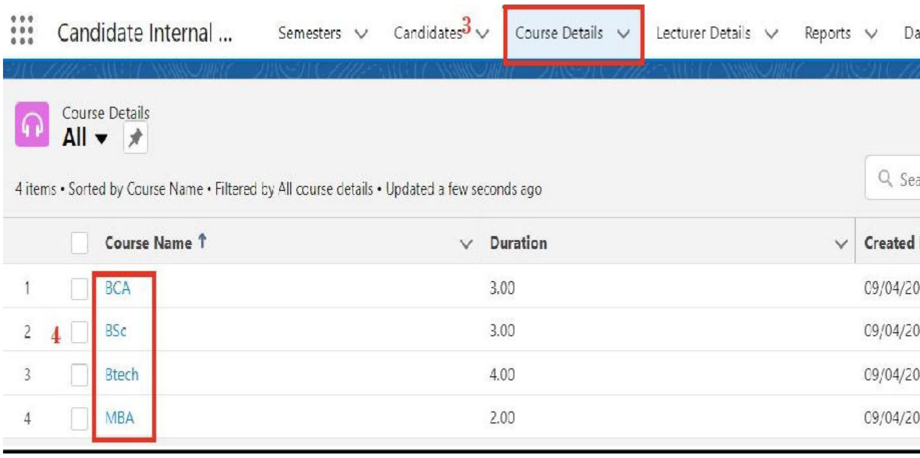


View Record (Course Details)

Viewing the Records of Course Detail Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on any record name. you can see the details of the Driver

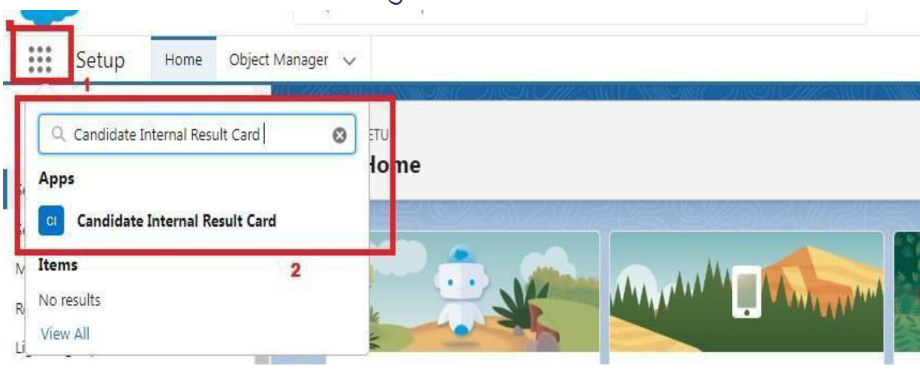


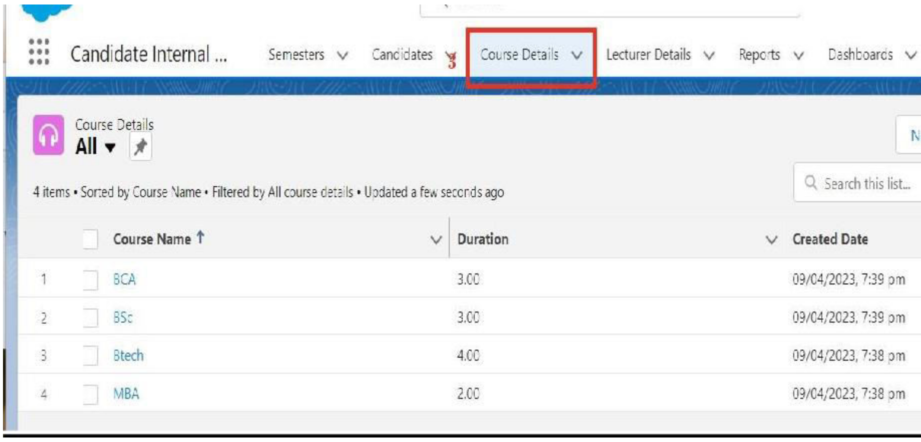


Delete Record (Course Details)

Deleting Records of Course Details Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.





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.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every reporttype has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects. Once a report is created its report type cannot be changed.

There are 2 types of report types:

Standard Report Types: Standard Report Types are automatically included with standard objects and also with customobjects where “Allow Reports” is checked. Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object iscreated, also when a relationship is created.

Note: Standard report types always have inner joins.

Custom Report Types: Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report.
The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

Viewer: With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

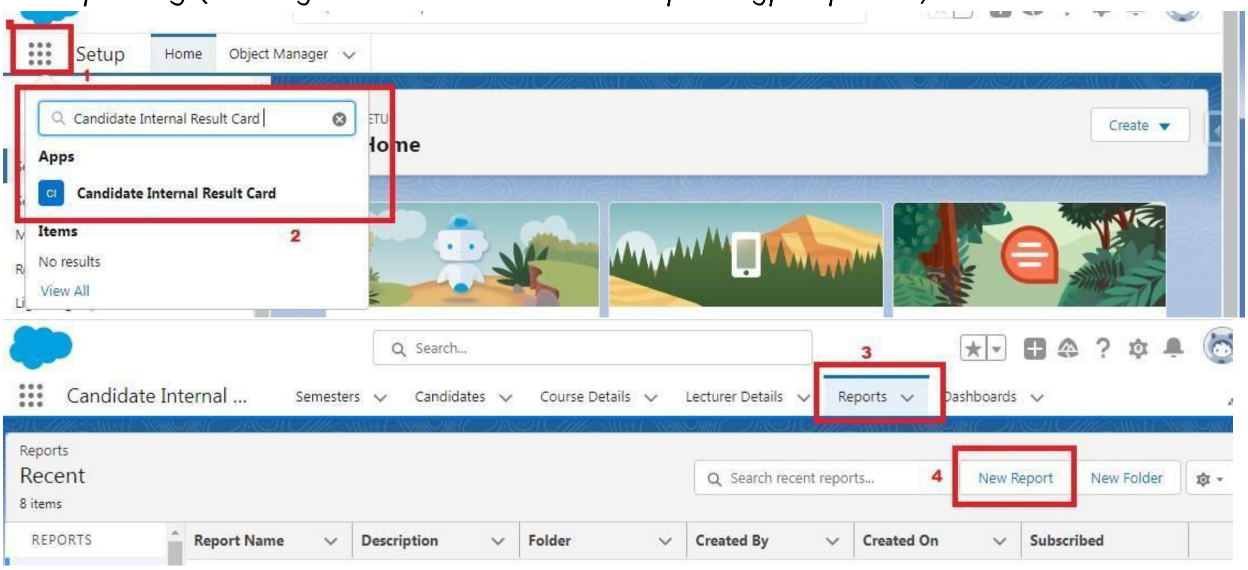
Editor: With this access level, users can view and modify the reports it contains and can also move themto/from any other folders they have access level as Editor or Manager.

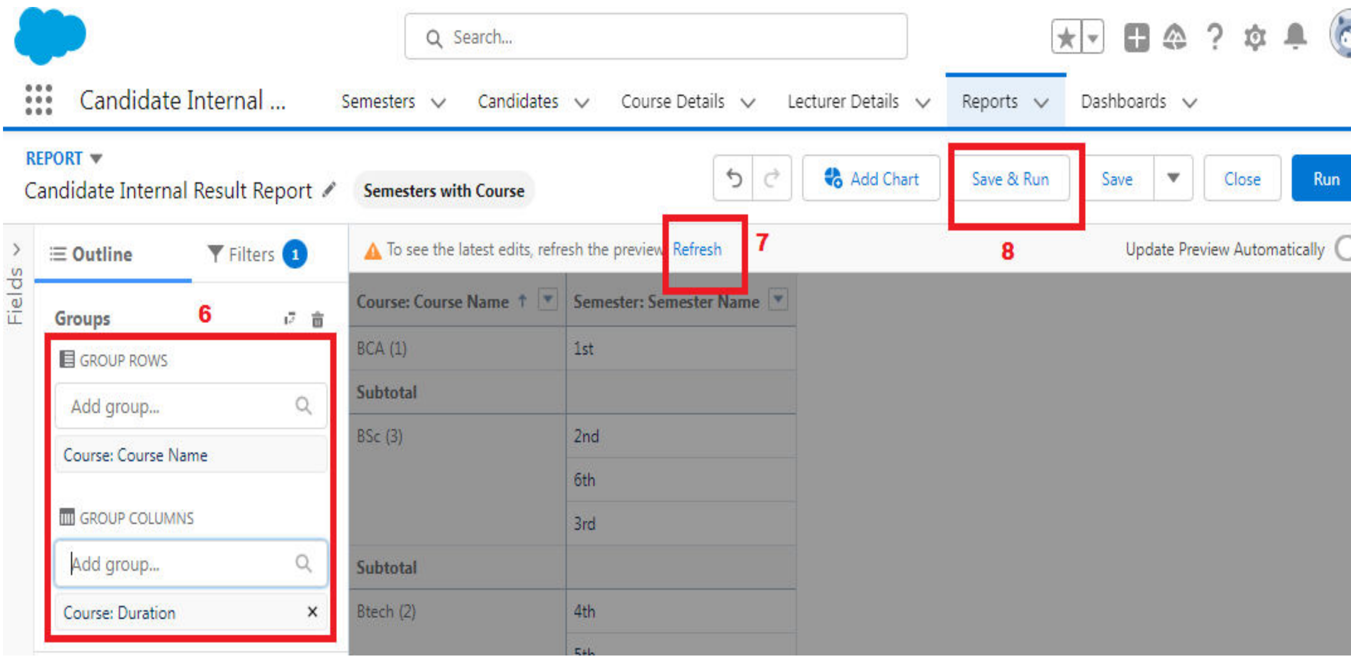
Manager: With this access level, users can do everything Viewers & Editors can do, plus they can alsocontrol other user’ s access levels to this folder. Also, users with Manager Access levels can delete the report.

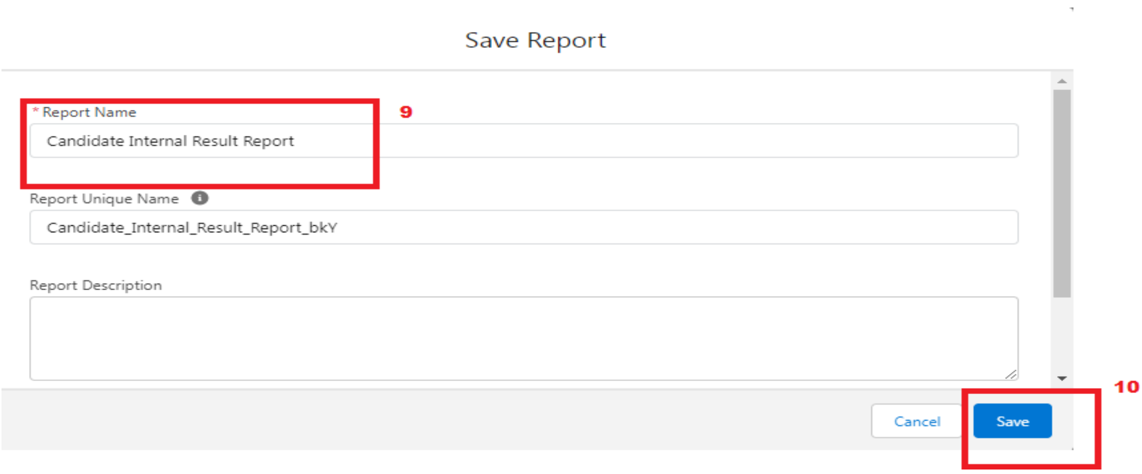
Create Report

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

NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).

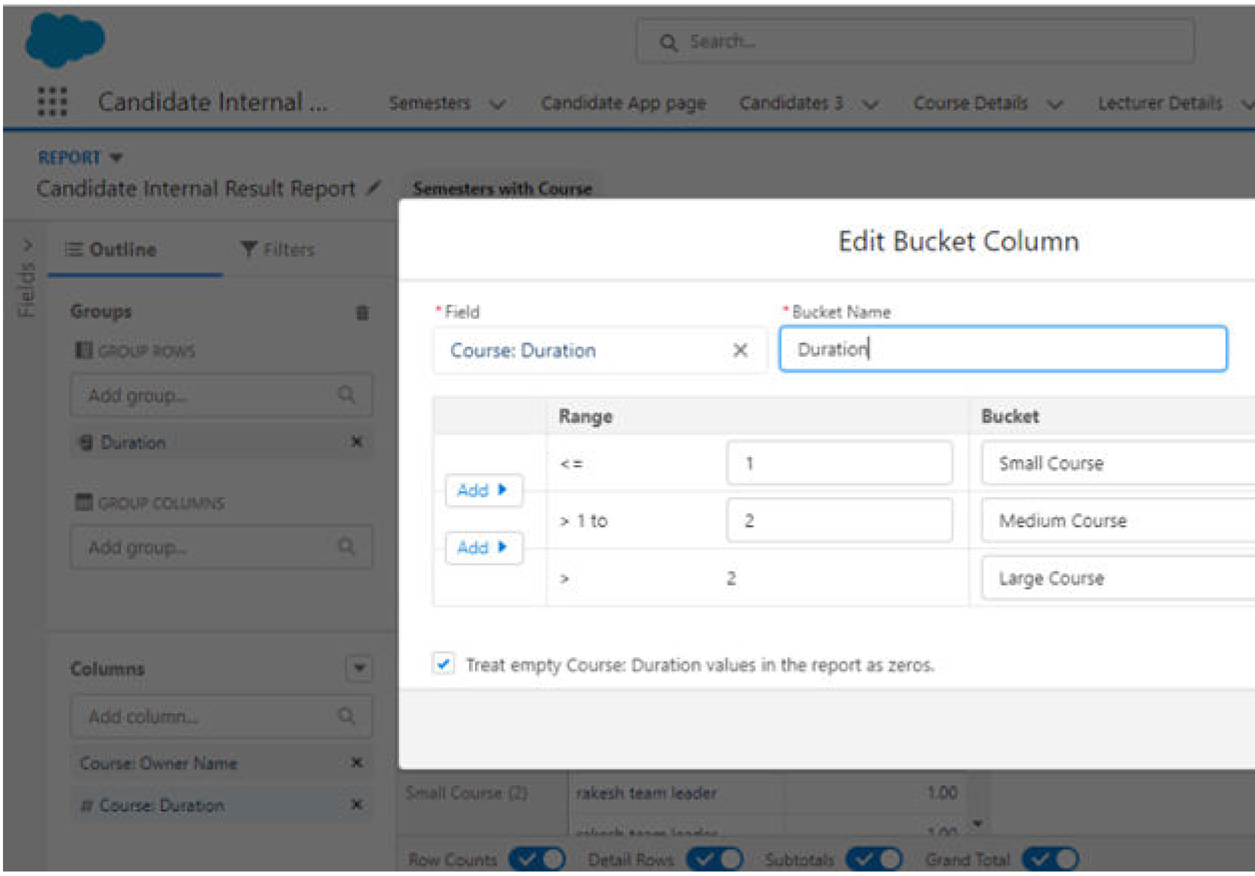


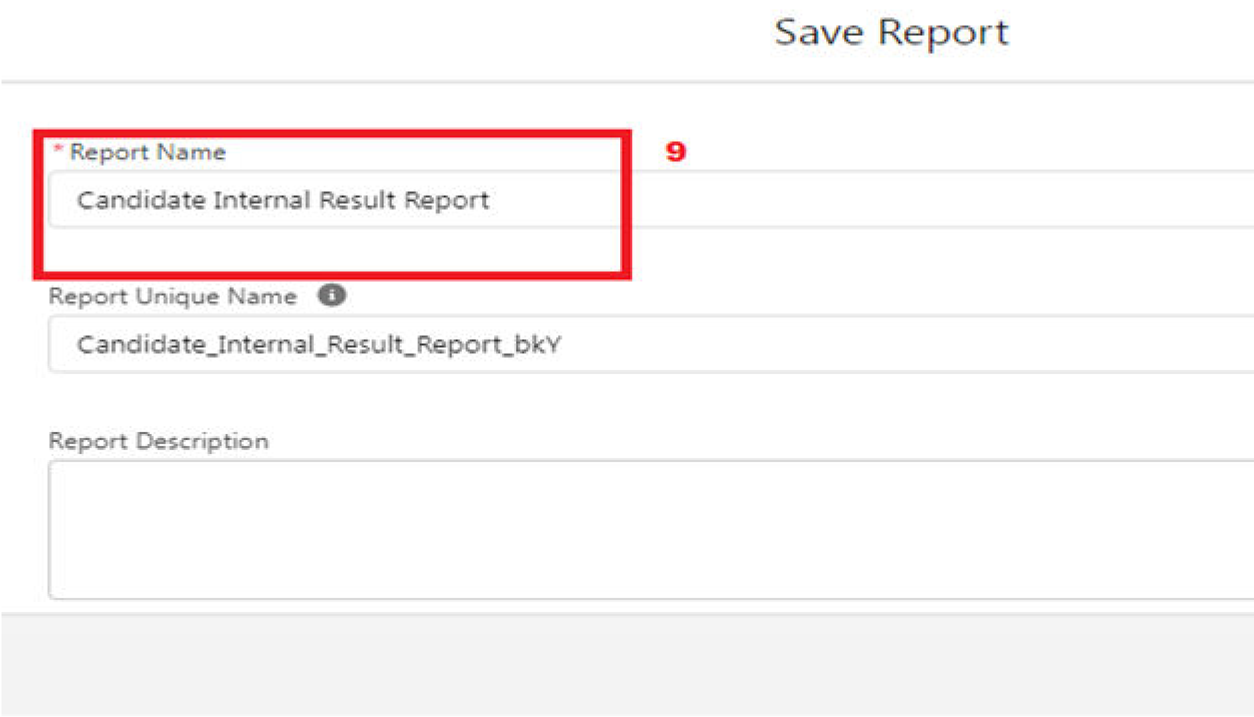




1. On the report builder page, locate the "Fields" pane on the left-hand side.
2. Find the field for which you want to create a bucket field and drag it to the report preview section.
3. Click on the field in the report preview to open the field properties.
4. In the field properties, locate the "Summarize" option and click the drop-down arrow.
5. Select "Bucket Field" from the available options.

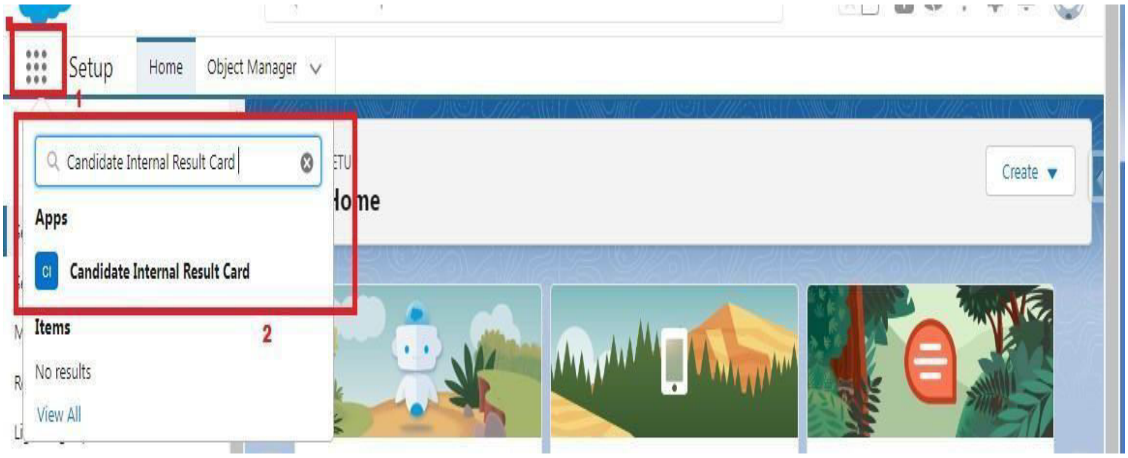
6. In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.
7. Click "OK" or "Apply" to save the bucket field settings.
8. Customize the report layout and add any additional fields or filters as needed.
9. Once you are satisfied with the report setup, click "Save" to save the report.

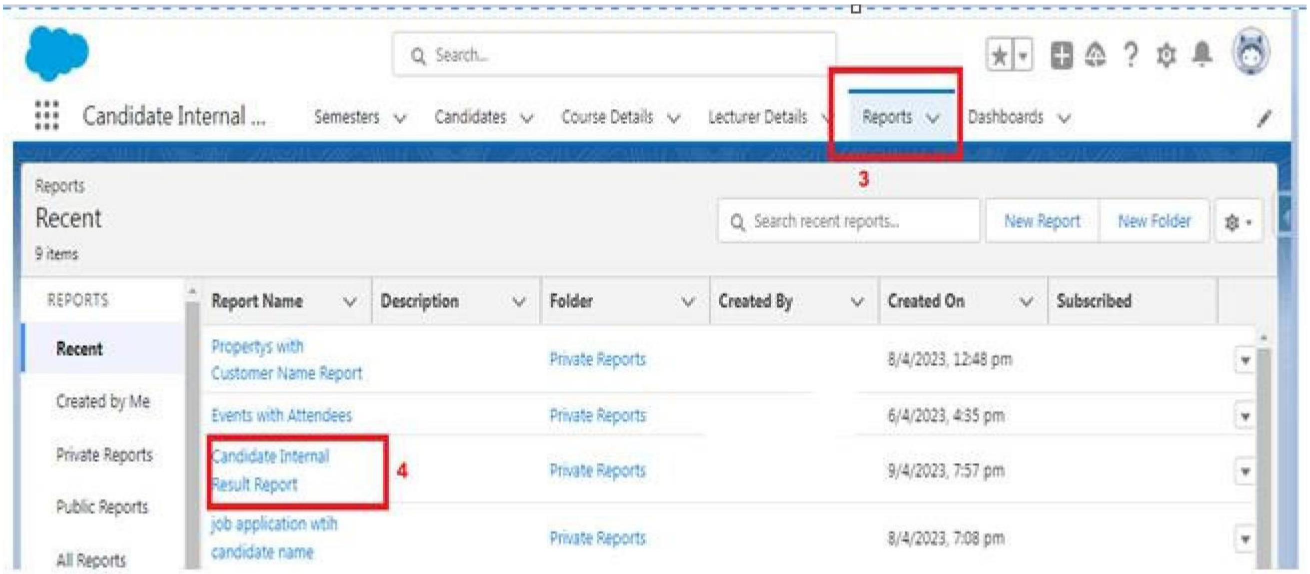




View Report

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



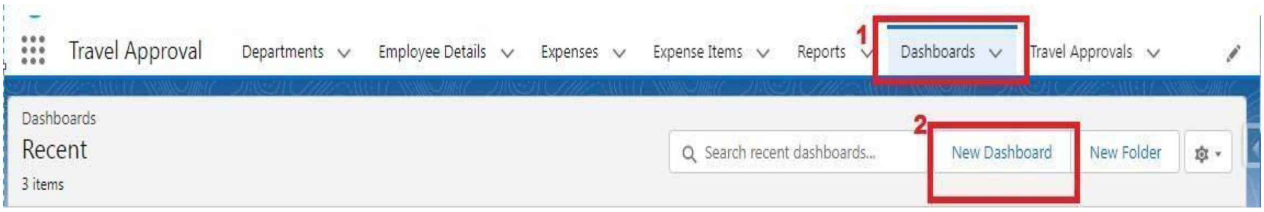


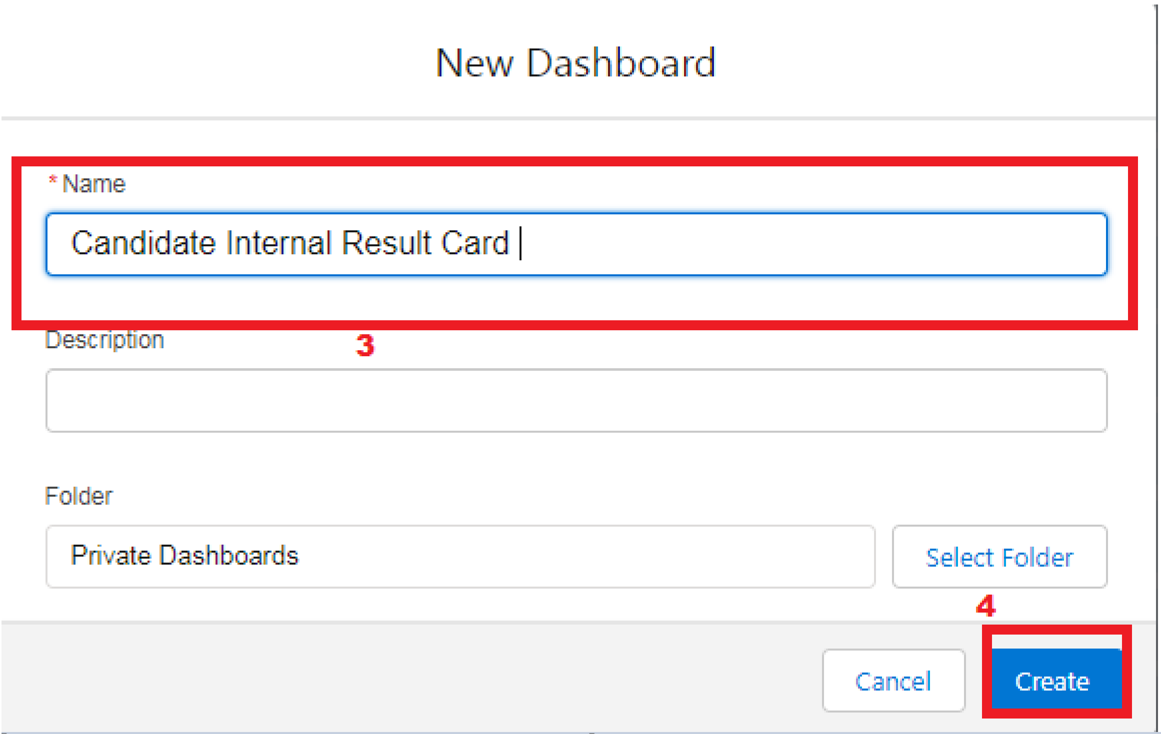
Dashboards

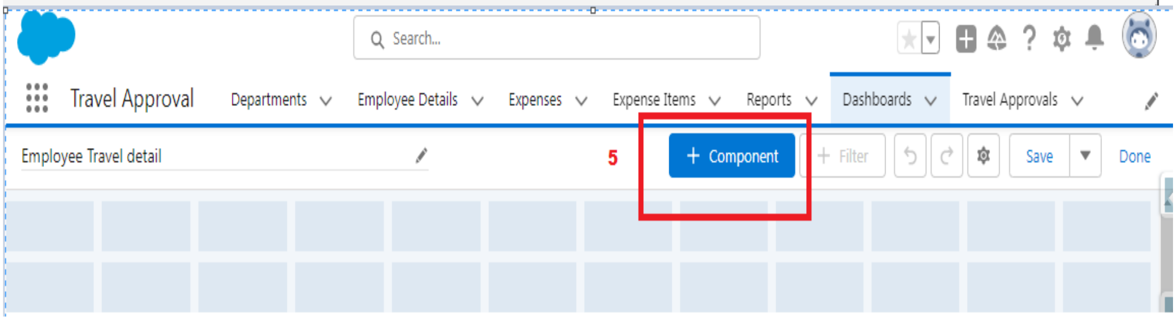
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they'reable to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to asingle dashboard.

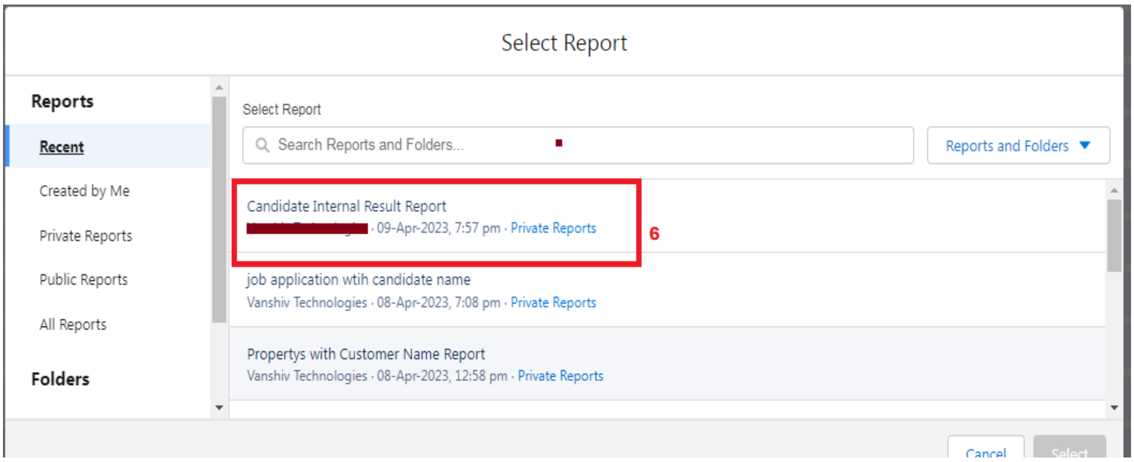
Create Dashboard

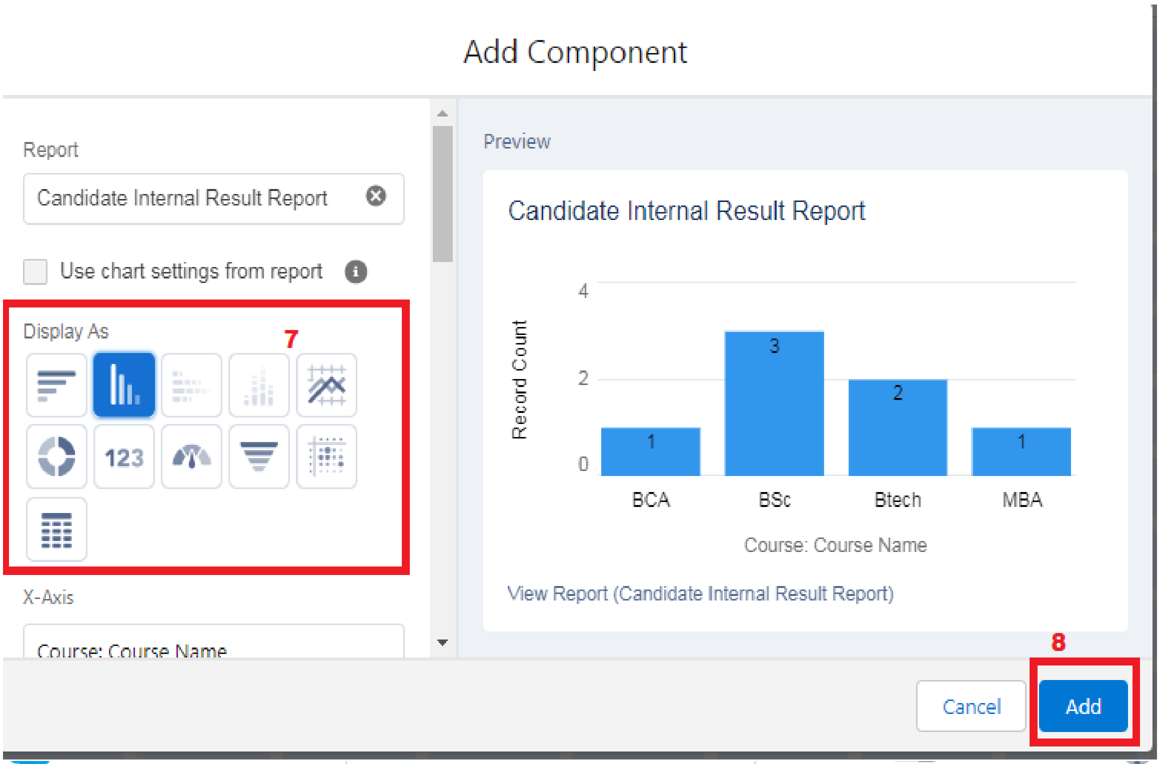
1. Click on Dashboards tab from the Candidate Internal Result Card application.
2. Click on new dashboard.
3. Give name - Candidate Internal Result Card
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Candidate Internal Result Report which you created.
7. For the data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

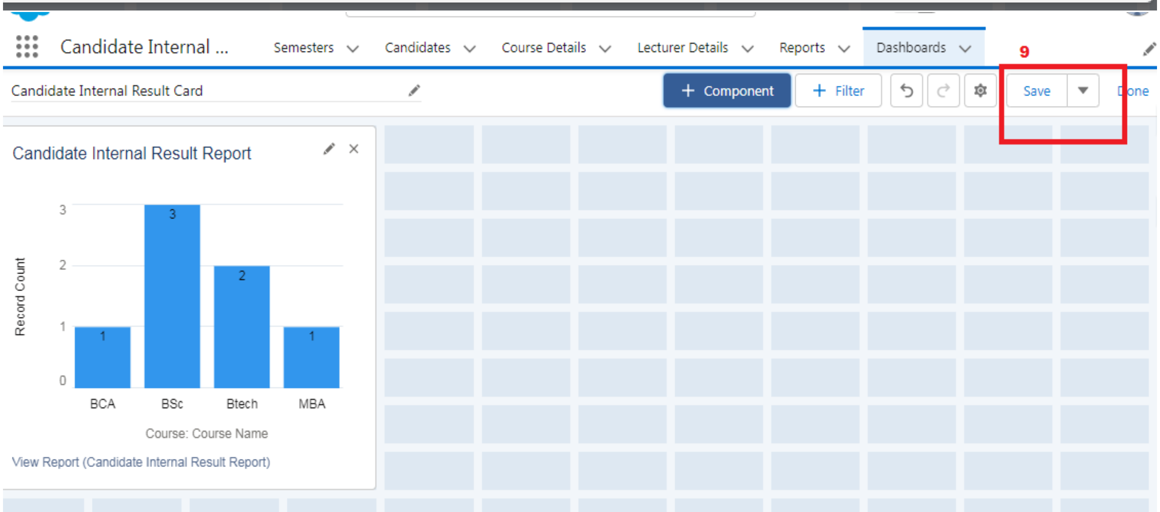

Travel Approval
Departments
Employee Details
Expenses
Expense Items
Reports
1
Dashboards
Travel Approvals
Dashboards
Recent
3 items
Search recent dashboards...
2
New Dashboard
New Folder


New Dashboard
* Name
Candidate Internal Result Card
Description
3
Folder
Private Dashboards
Select Folder
4
Cancel
Create


Search...
Travel Approval
Departments
Employee Details
Expenses
Expense Items
Reports
Dashboards
Travel Approvals
Employee Travel detail
5
+ Component
+ Filter
Save
Done


Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Select Report
Search Reports and Folders...
Reports and Folders
Candidate Internal Result Report
[redacted] · 09-Apr-2023, 7:57 pm · Private Reports
6
job application wtih candidate name
Vanshiv Technologies · 08-Apr-2023, 7:08 pm · Private Reports
Propertys with Customer Name Report
Vanshiv Technologies · 08-Apr-2023, 12:58 pm · Private Reports


Add Component
Report
Candidate Internal Result Report
Use chart settings from report
Display As
7
123
X-Axis
Course: Course Name
Preview
Candidate Internal Result Report
Record Count
4
2
0
3
2
1
1
BCA
BSc
Btech
MBA
Course: Course Name
View Report (Candidate Internal Result Report)
8
Cancel
Add


Candidate Internal ...
Semesters
Candidates
Course Details
Lecturer Details
Reports
Dashboards
Candidate Internal Result Card
+ Component
+ Filter
9
Save
Done
Candidate Internal Result Report
Record Count
3
2
1
0
BCA
BSc
Btech
MBA
Course: Course Name
View Report (Candidate Internal Result Report)

View Dashboard

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