Muthurangam Gov Arts and Science College (A)

Vellore

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

Submitted by

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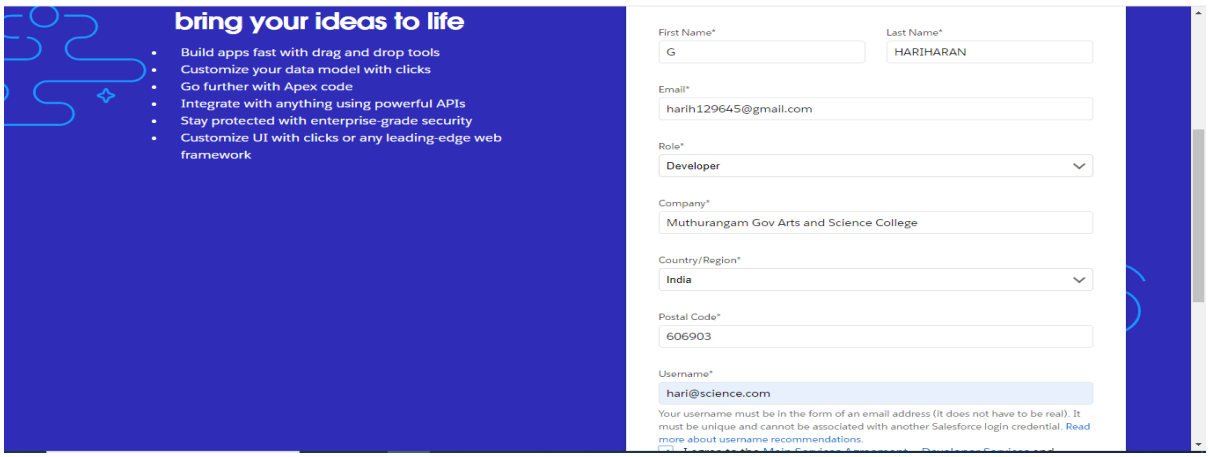
The following steps are used to create the app:

Milestone 1:

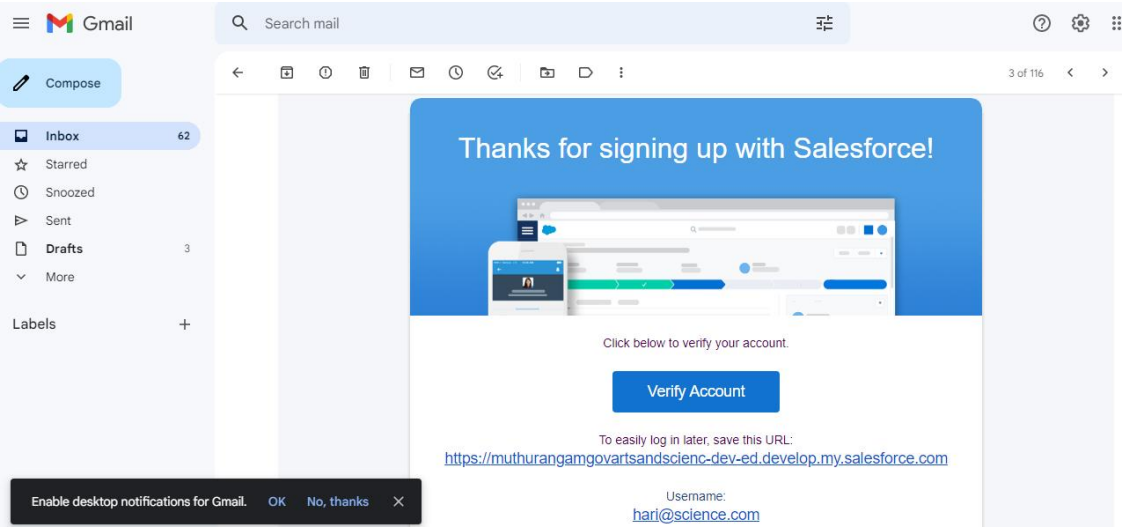
STEP 1: To creating the developer account first so, go to the ***developers salesforce.com*** click the page will be opened. Enter the required details like as name, email etc… the mail will be received with user name. The shown Fig(1)

STEP 2: Opened the received mail click the verify option and **generate the Strong password.** This will be shown in the Fig(2)

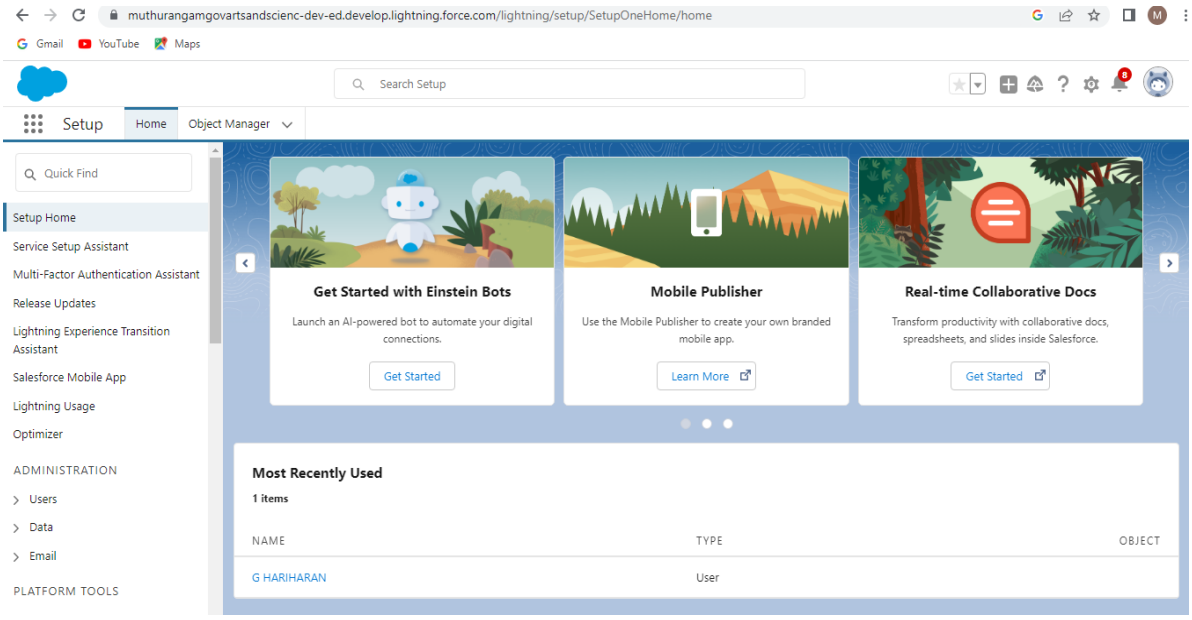
STEP 3: Now go to the **Salesforce.com** and enter the valid username and password the new Setup tab will be opened it will be shown in Fig(3)


bring your ideas to life
Build apps fast with drag and drop tools
Customize your data model with clicks
Go further with Apex code
Integrate with anything using powerful APIs
Stay protected with enterprise-grade security
Customize UI with clicks or any leading-edge web framework
First Name*
G
Last Name*
HARIHARAN
Email*
harih129645@gmail.com
Role*
Developer
Company*
Muthurangam Gov Arts and Science College
Country/Region*
India
Postal Code*
606903
Username*
hari@science.com
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

Fig(1)


Gmail
Search mail
Compose
Inbox 62
Starred
Snoozed
Sent
Drafts 3
More
Labels
3 of 116
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://muthurangamgovartsandscienc-dev-ed.develop.my.salesforce.com
Username:
hari@science.com
Enable desktop notifications for Gmail.
OK
No, thanks

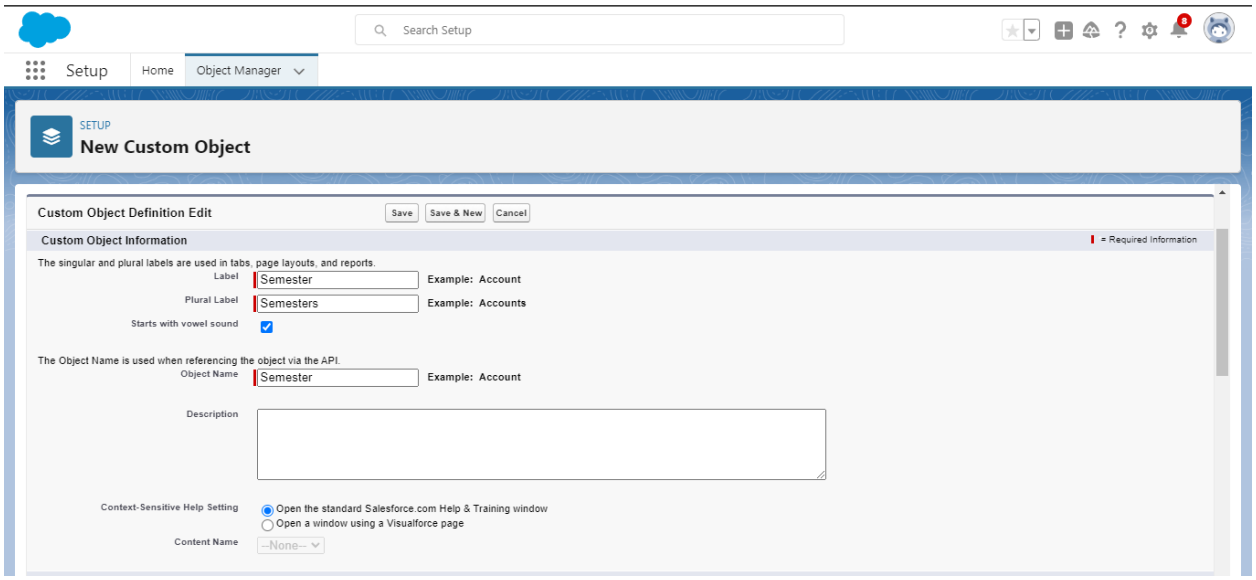
Fig(2)



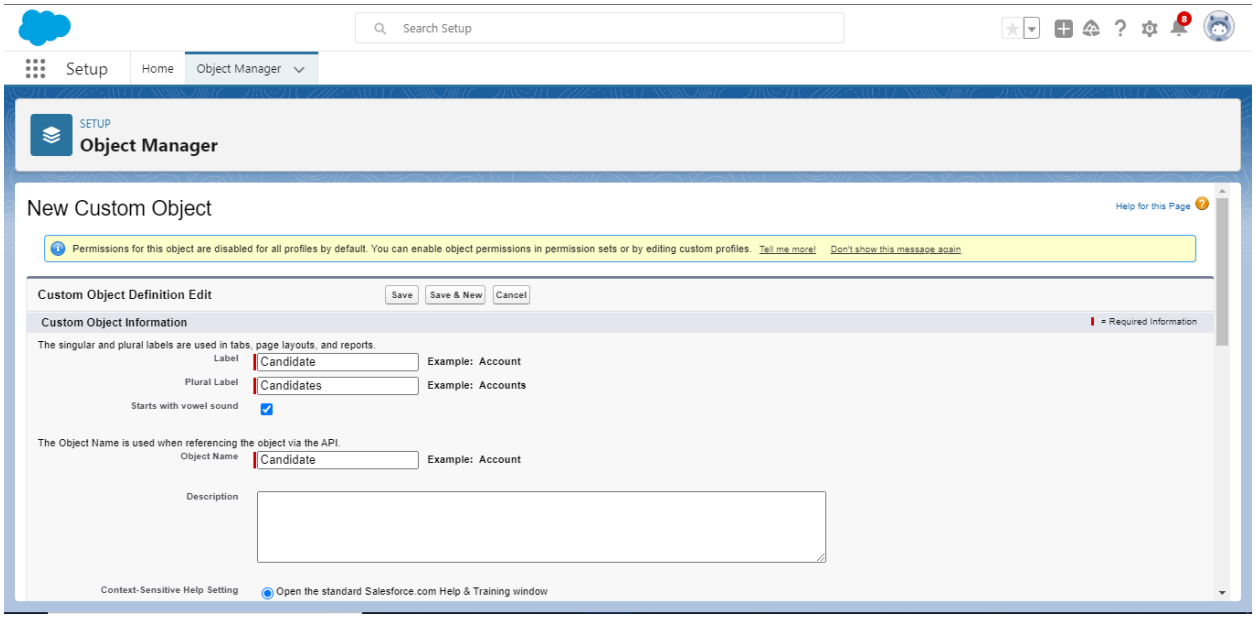
Fig(3)

Milestone:2

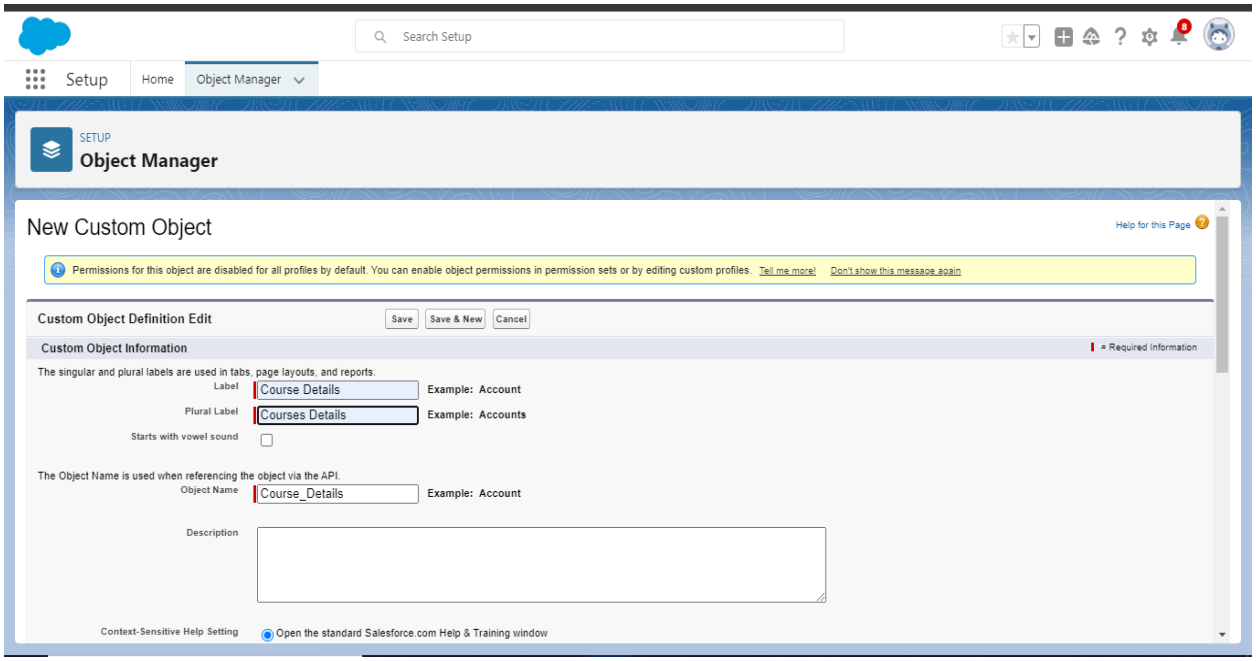
STEP 4: Now click the **object manager** on our left side create new custom object. The objects name are Semester, Candidate, Course Details, Lecturer Details and Internal Results these are shown in Figs (4). Now go to the **fields and relationship** Option select new option and custom field will be opened we will entered the Fields name like as Semster name , Courses, Internal results, Marks etc… these are shown in the Figs(5).


Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Semester
Example: Account
Plural Label
Semesters
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Semester
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--

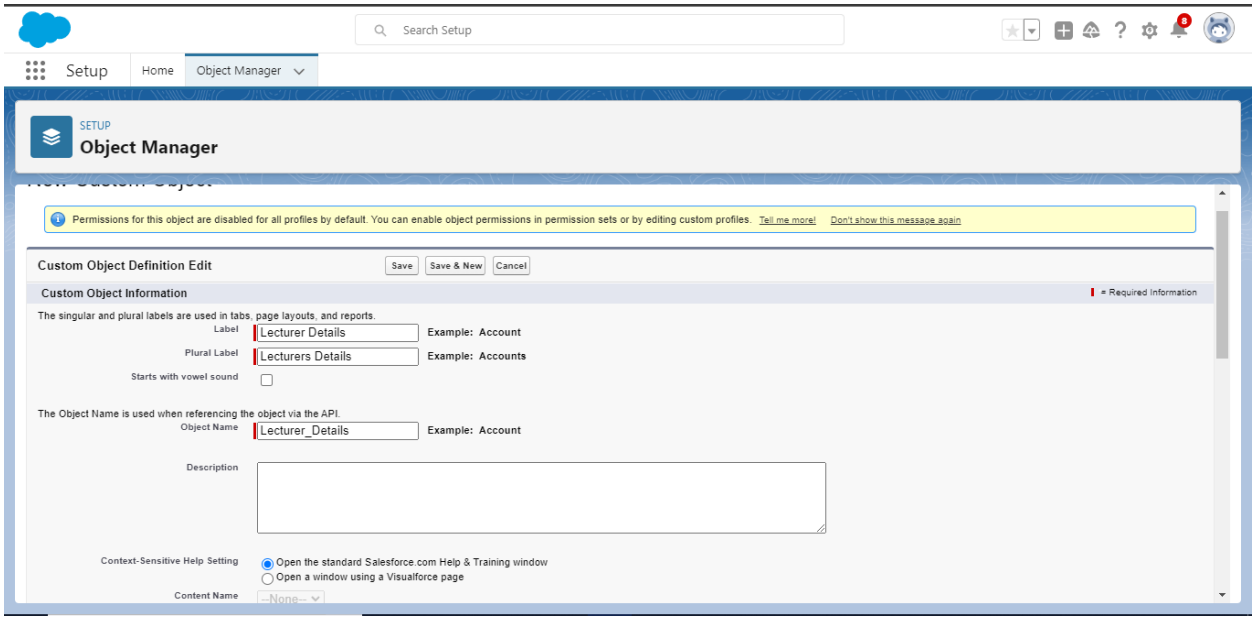
Fig(4)


Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.
Tell me more!
Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Candidate
Example: Account
Plural Label
Candidates
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Candidate
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window

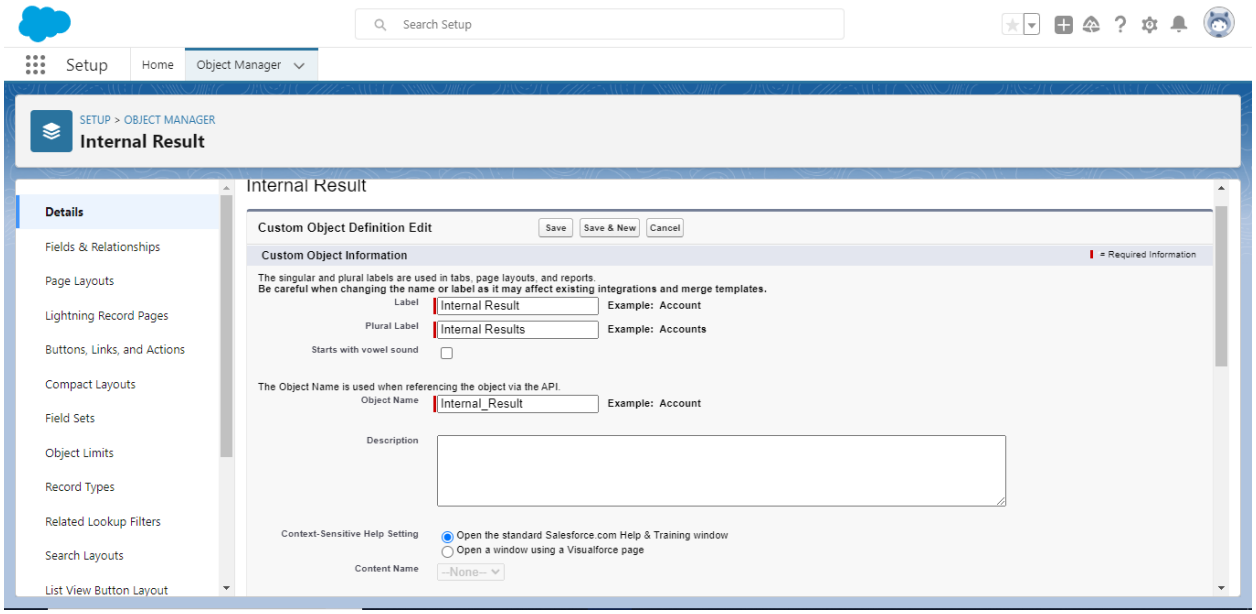
Fig(4)


Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Course Details
Example: Account
Plural Label
Courses Details
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Course_Details
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window

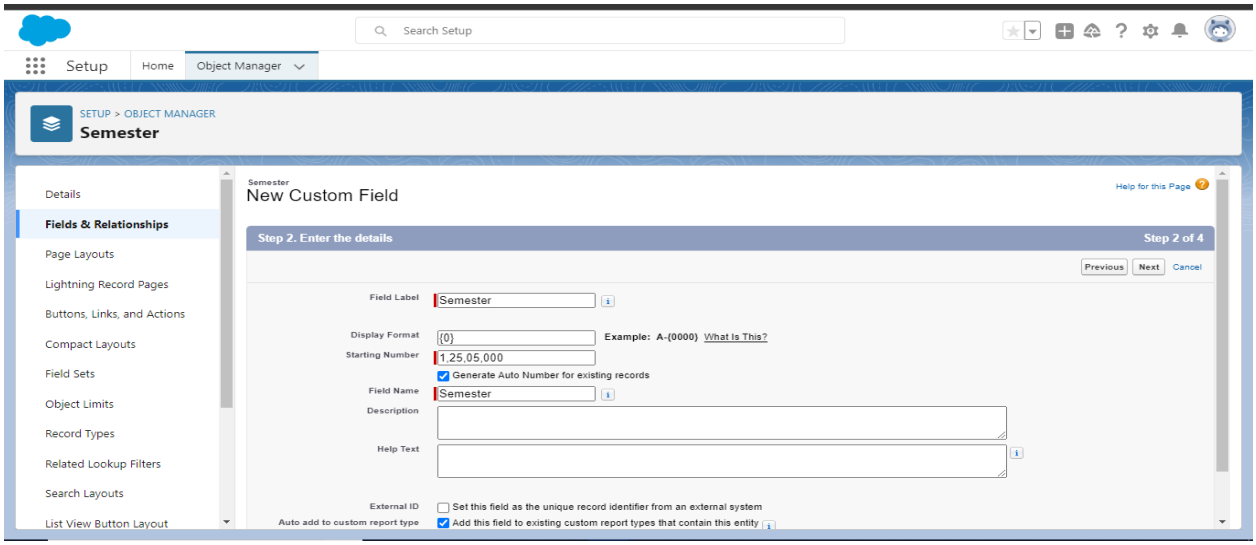
Fig(4)


Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Lecturer Details
Example: Account
Plural Label
Lecturers Details
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Lecturer_Details
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--

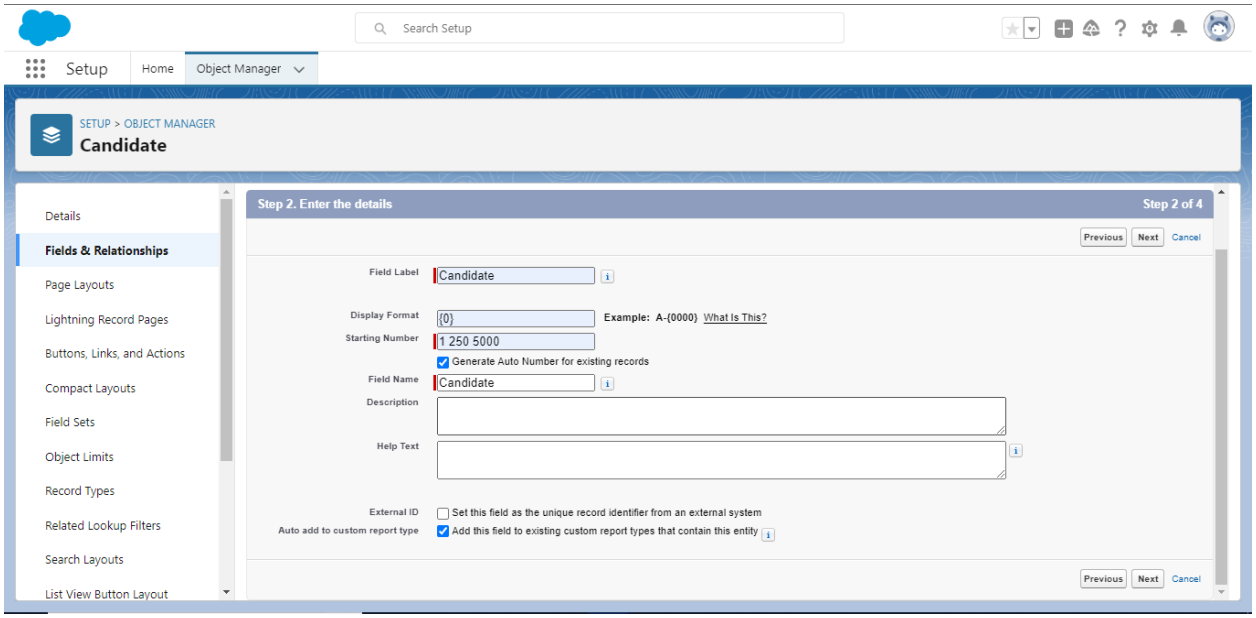
Fig(4)


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Internal Result
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Internal Result
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Internal Result
Example: Account
Plural Label
Internal Results
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
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--

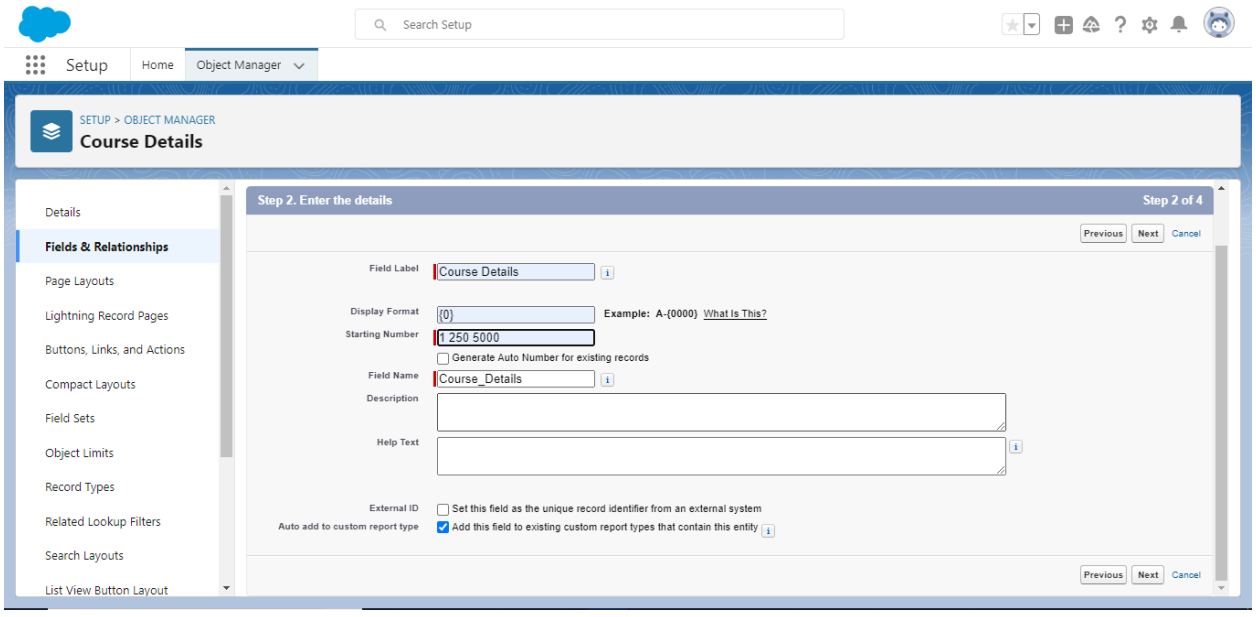
Fig(4)


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Semester
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
Semester
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Semester
Display Format
{0}
Example: A-{0000} What Is This?
Starting Number
1,25,05,000
Generate Auto Number for existing records
Field Name
Semester
Description
Help Text
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 entity

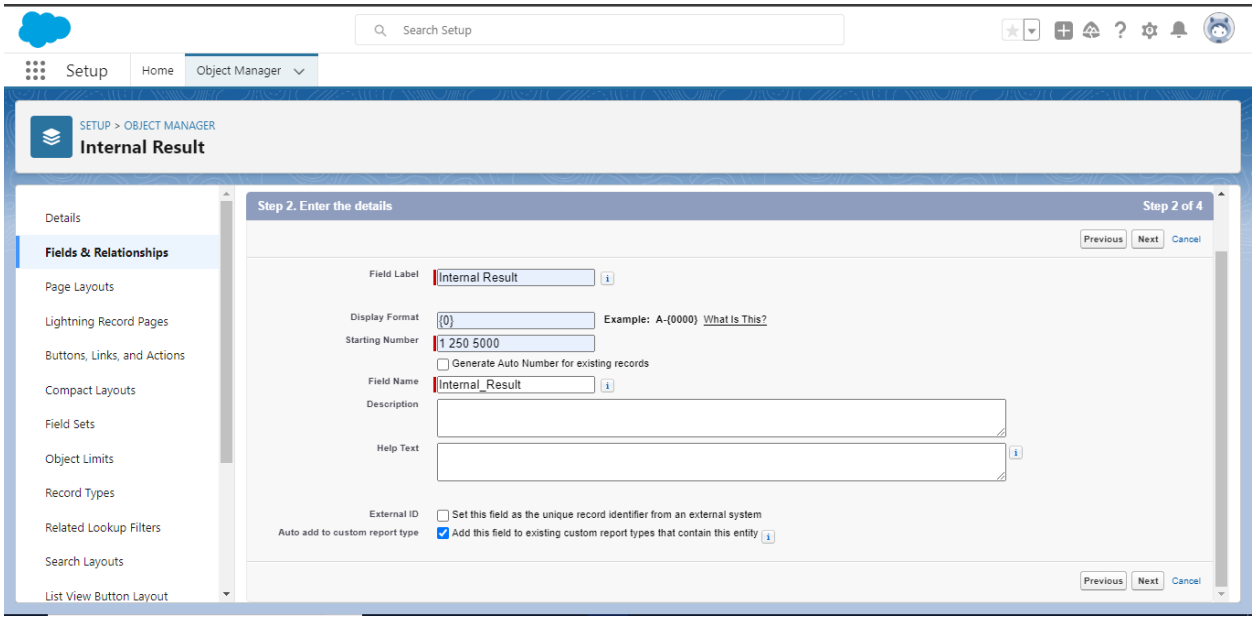
Fig(5)


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Candidate
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Candidate
Display Format
{0}
Example: A-{0000} What Is This?
Starting Number
1 250 5000
Generate Auto Number for existing records
Field Name
Candidate
Description
Help Text
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 entity

Fig(5)


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Course Details
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
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Course Details
Display Format
{0}
Example: A-{0000} What Is This?
Starting Number
1 250 5000
Generate Auto Number for existing records
Field Name
Course_Details
Description
Help Text
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 entity

Fig(5)



Fig(5)

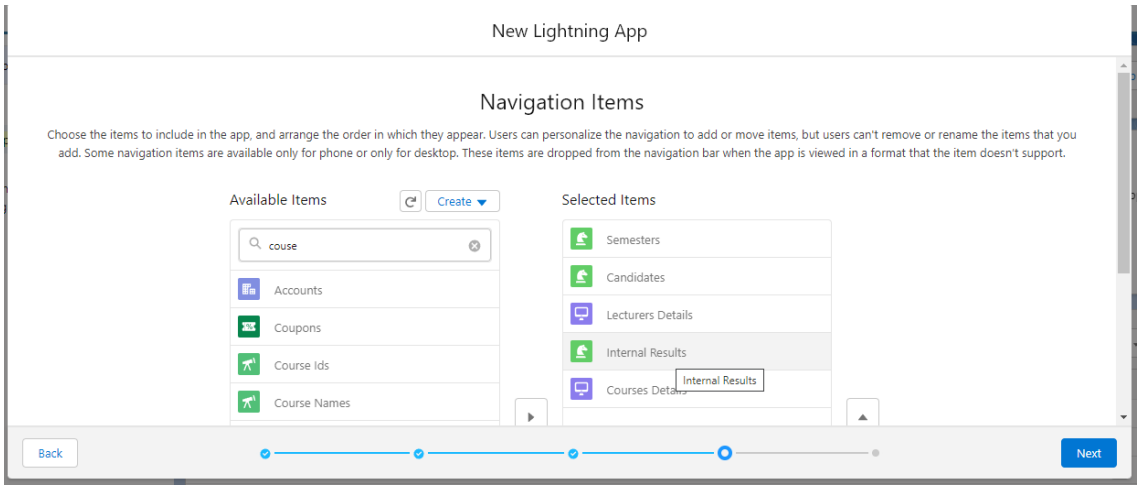
Milestone:3

LIGHTNING APP **:**

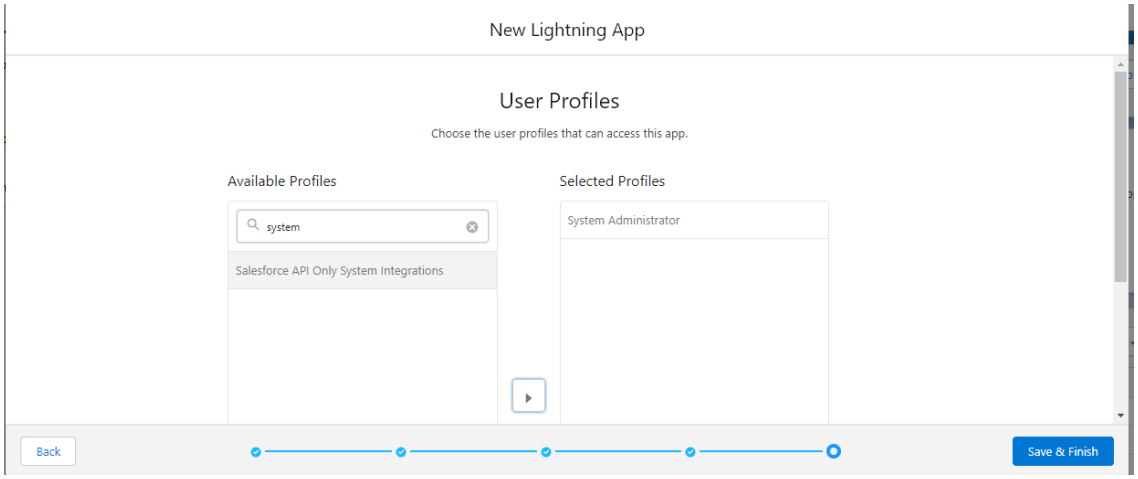
Create the Candidate Internal Result Card app:

STEP 5: To select the quick find and search **app manager** select it and click the **New Lightning app** enter the app name as *Candidate Internal Result Card* and click next as default option. From available items select the our custom object search easly in navigation box. Move then to **selected items.** It will shown in the Fig(6)

STEP 6: Select the users now so click the ***System Administrator*** user to move selected items and click save and finish shown in Fig(6a), now check the app so go to the app launcher serach the app name .


New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
couse
Accounts
Coupons
Course Ids
Course Names
Selected Items
Semesters
Candidates
Lecturers Details
Internal Results
Courses Details
Internal Results
Back
Next

Fig(6)


New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
system
Salesforce API Only System Integrations
Selected Profiles
System Administrator
Back
Save & Finish

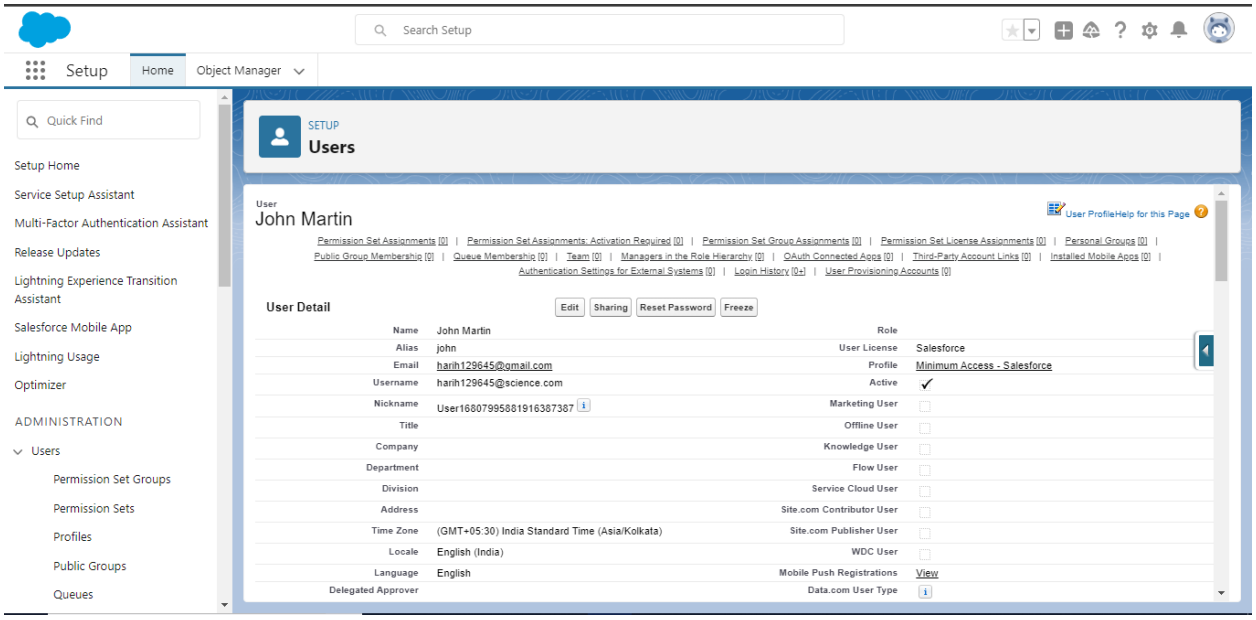
Fig(6a)

Milestone:4

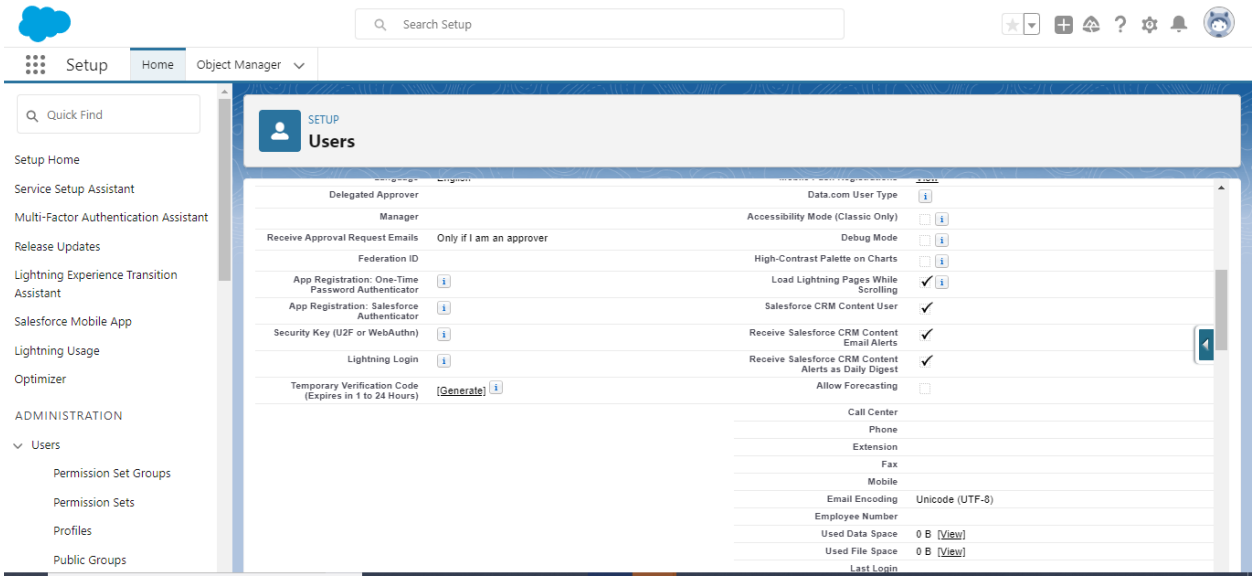
USERS:

STEP 7: From the setup menu quick find box search **users** and select it. Click the ***new user***

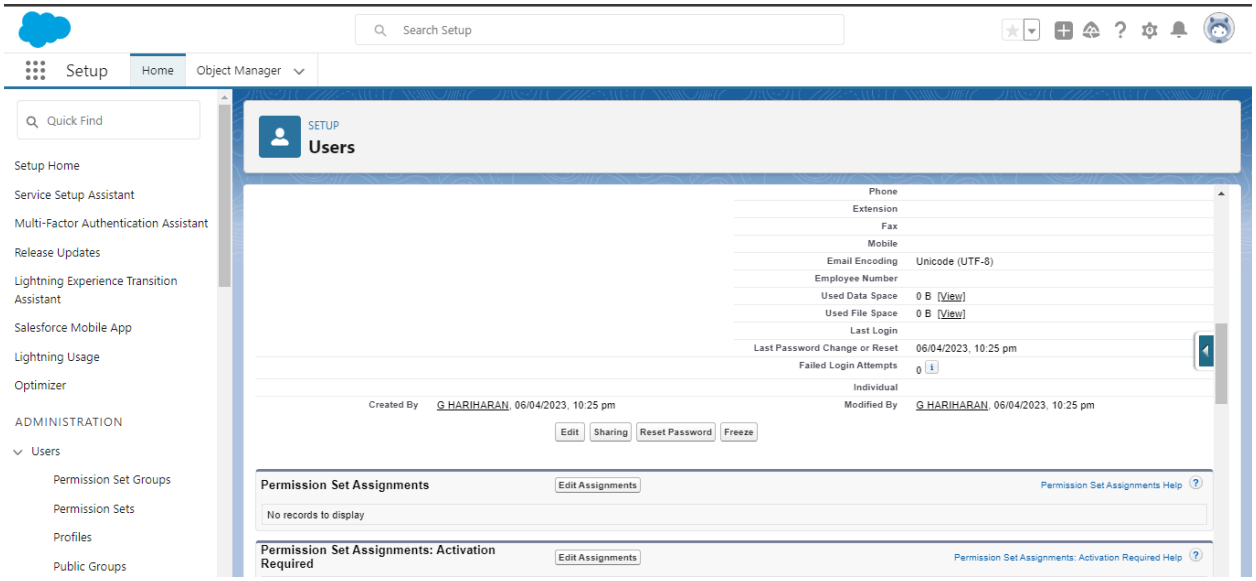
Fill the required details the mail will be received. And **reset** the password the users will be created it. It will shown in the Fig(7), (7a)and (7b).



Fig(7)


Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Users
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Federation ID
App Registration: One-Time Password Authenticator
App Registration: Salesforce Authenticator
Security Key (U2F or WebAuthn)
Lightning Login
Temporary Verification Code (Expires in 1 to 24 Hours)
[Generate]
Data.com User Type
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts
Receive Salesforce CRM Content Alerts as Daily Digest
Allow Forecasting
Call Center
Phone
Extension
Fax
Mobile
Email Encoding
Unicode (UTF-8)
Employee Number
Used Data Space
0 B [View]
Used File Space
0 B [View]
Last Login

Fig(7a)

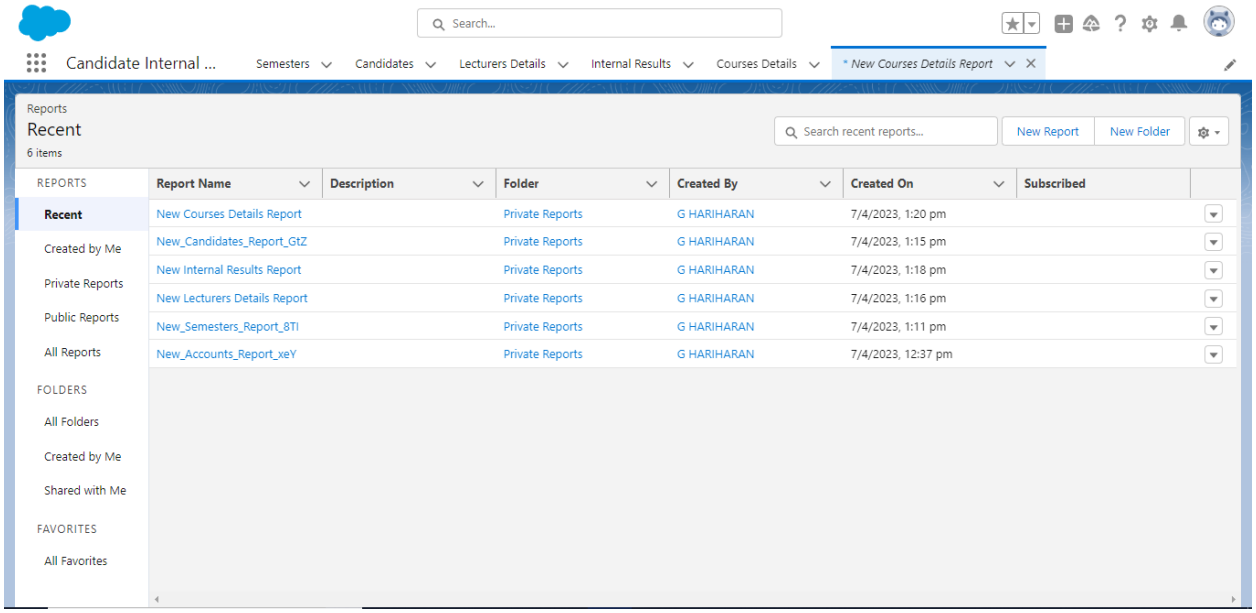

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Users
Phone
Extension
Fax
Mobile
Email Encoding
Unicode (UTF-8)
Employee Number
Used Data Space
0 B [View]
Used File Space
0 B [View]
Last Login
Last Password Change or Reset
06/04/2023, 10:25 pm
Failed Login Attempts
0
Individual
Created By
G HARIHARAN, 06/04/2023, 10:25 pm
Modified By
G HARIHARAN, 06/04/2023, 10:25 pm
Edit
Sharing
Reset Password
Freeze
Permission Set Assignments
Edit Assignments
Permission Set Assignments Help
No records to display
Permission Set Assignments: Activation Required
Edit Assignments
Permission Set Assignments: Activation Required Help

Fig(7b)

Milestone:5

REPORTS:

STEP 8: In the app launcher search the report and click it. On our right side **new report** Option is available click it. Select a report in a find box, the reports are in object name like as Semester, Lecturer Details etc… click it, on our right side **start report** option will be showned click it and finish the reports. Click the save & run option. The reports are shown in the Fig(8).

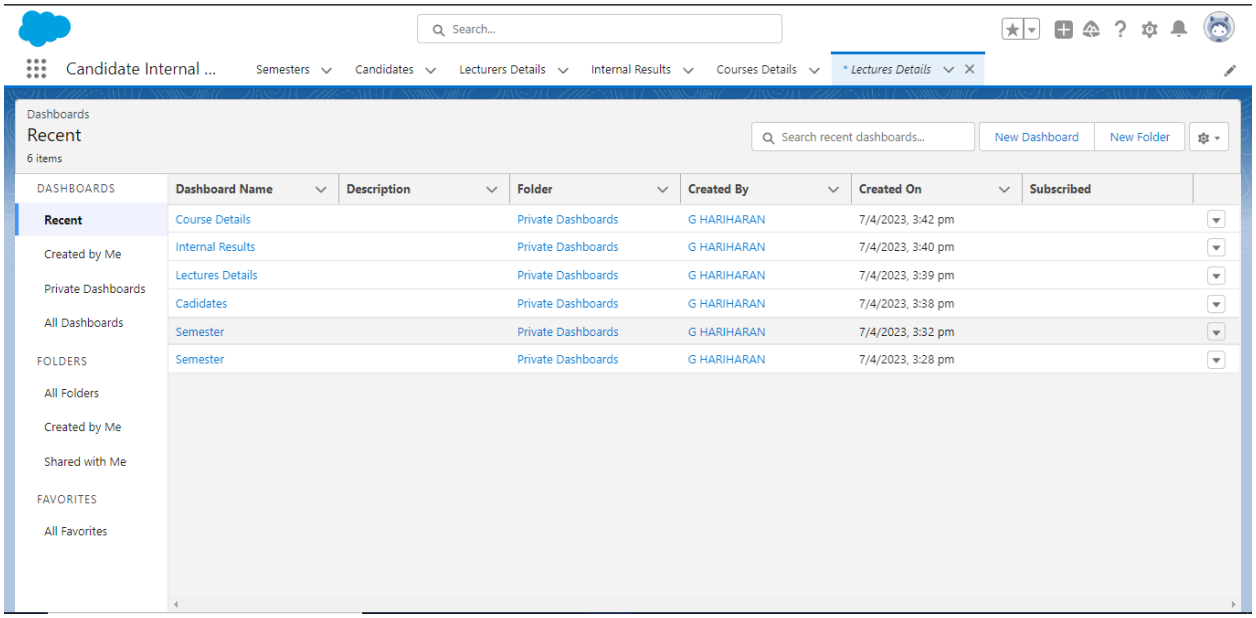


Fig(8)

Milestone:6

DASHBOARDS:

STEP 9: From the setup menu click the **app launcher** and search the dashboards and click on it. On our right side new dashboard is here click it and the dashboard will be opned type the title and select the **vertical add sysmbol** and select the reports and click save & run option. The dashboards are shown in the Fig (9)



Fig(9)

SUBMITTED TO:

Our Sincere Thanks to

- SALESFORCE
- SMARTBRIDGE (Smart Internz)