MUTHURANGAM GOVT. ARTS COLLEGE (AUTONOMOUS), OTTERI ROAD, VELLORE – 02

Team ID : NM2023TMID03493
Team Size : 4
Team Leader : HARISH B
Team Members : JAIN RAJ S
JEGAN S
KANDASAMY T

IMPLEMENTING CRM FOR RESULT TRACKING OF A CSNDIDATE WITH INTERNAL MARKS

Project Based Experimental Learning Program

Implementing CRM for Result tracking of a candidate with internal marks.

Description :
Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer ,Lecturer should have the ability to create Internal Results , Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results , Re-evaluation Can be initialized by Candidate for all Internal Results . Now only dean can update the marks after re- evaluation

Milestone 1 : Creation Sales force Org :

What Is Sales force?

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

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

https://youtu.be/r9EX3lGde5k

Activity 1 :

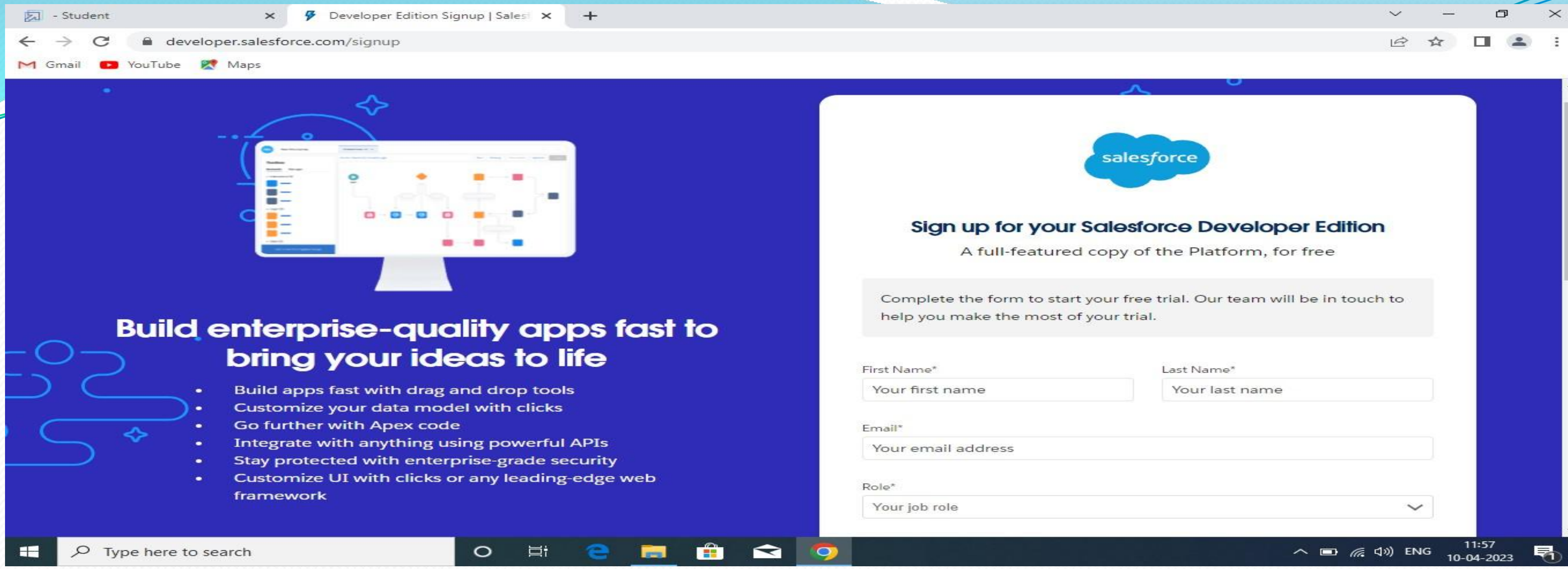
Creating Developer Account

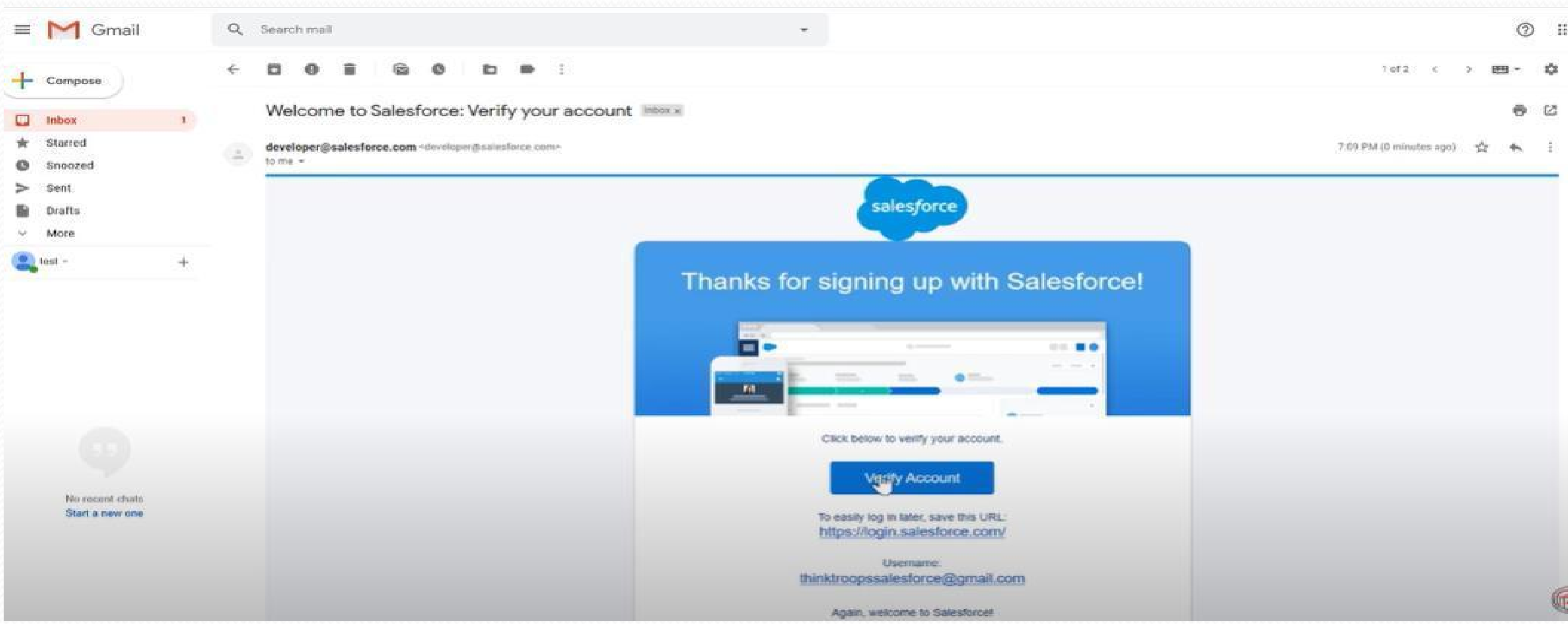
Creating a developer org in sales force.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :

a. First name & Last name
b. Email
c. Role : Developer
d. Company : College Name
e. County : India
f. Postal Code : pin code
g. Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the format : username@organization.com

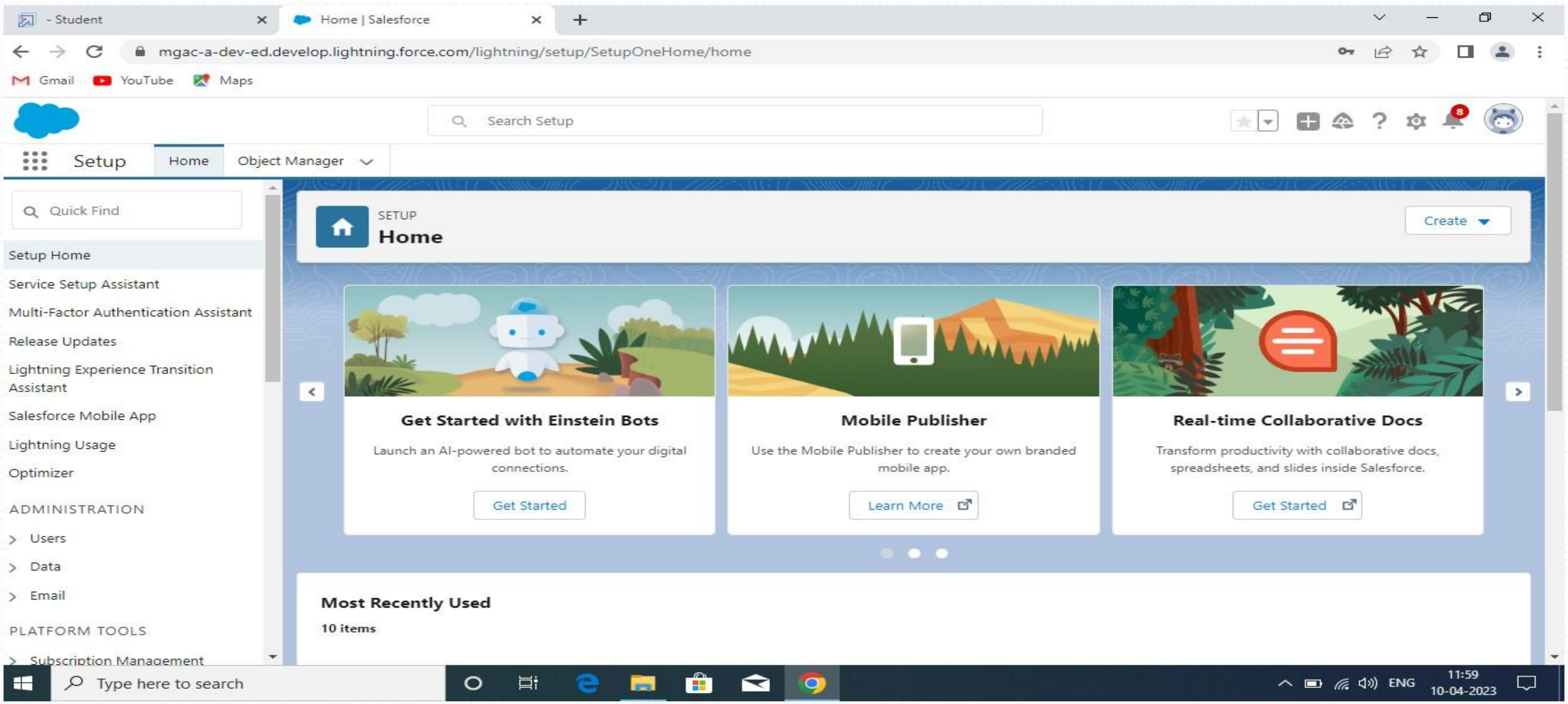
Click on sign up after filling these.


- Student
Developer Edition Signup | Sales
developer.salesforce.com/signup
Gmail
YouTube
Maps
Build enterprise-quality apps fast to 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
salesforce
Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free
Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.
First Name*
Your first name
Last Name*
Your last name
Email*
Your email address
Role*
Your job role
Type here to search
ENG
11:57
10-04-2023


Gmail
Search mail
Compose
Inbox
Starred
Snoozed
Sent
Drafts
More
Welcome to Salesforce: Verify your account
developer@salesforce.com
salesforce
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://login.salesforce.com/
Username:
thinktroopssalesforce@gmail.com
Again, welcome to Salesforce!

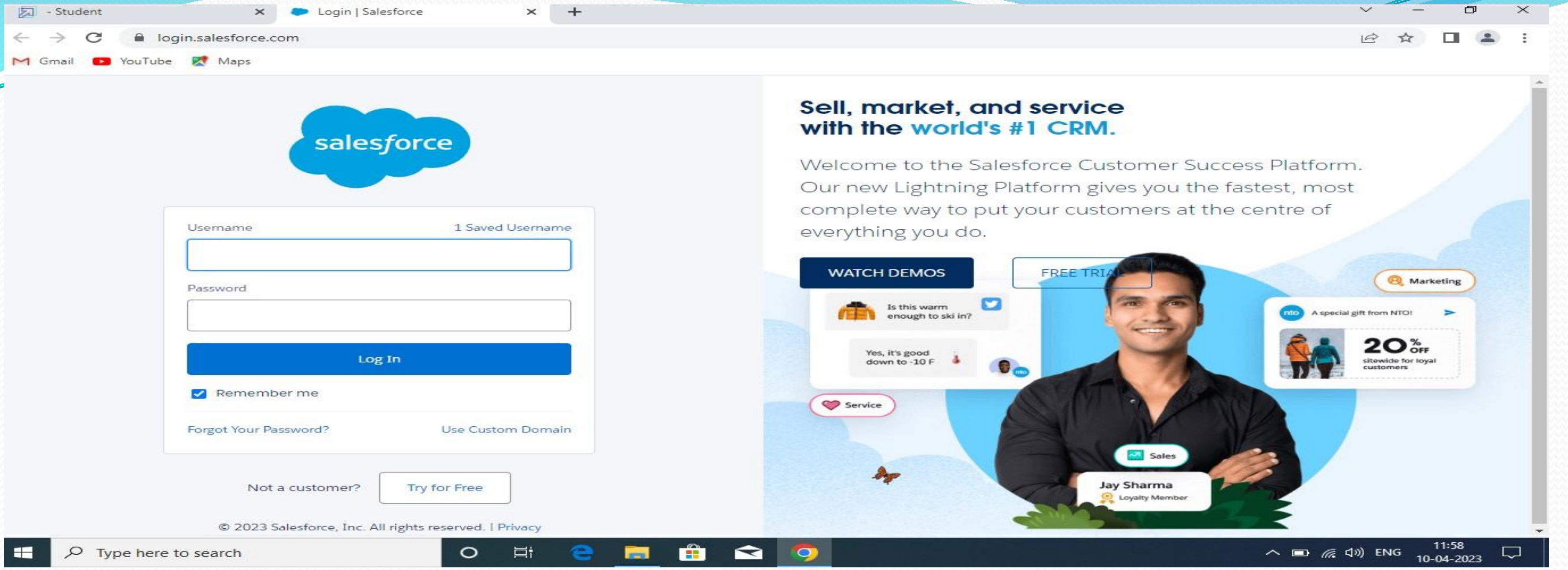
Login To Your Sales force Account

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.



Sales force Login

https://login.salesforce.com



Milestone-2:Object :

Custom objects :

1. Semester
2. Candidate
3. Course Details
4. Lecturer Details
5. Internal results

Activity-1:

To Create an object :

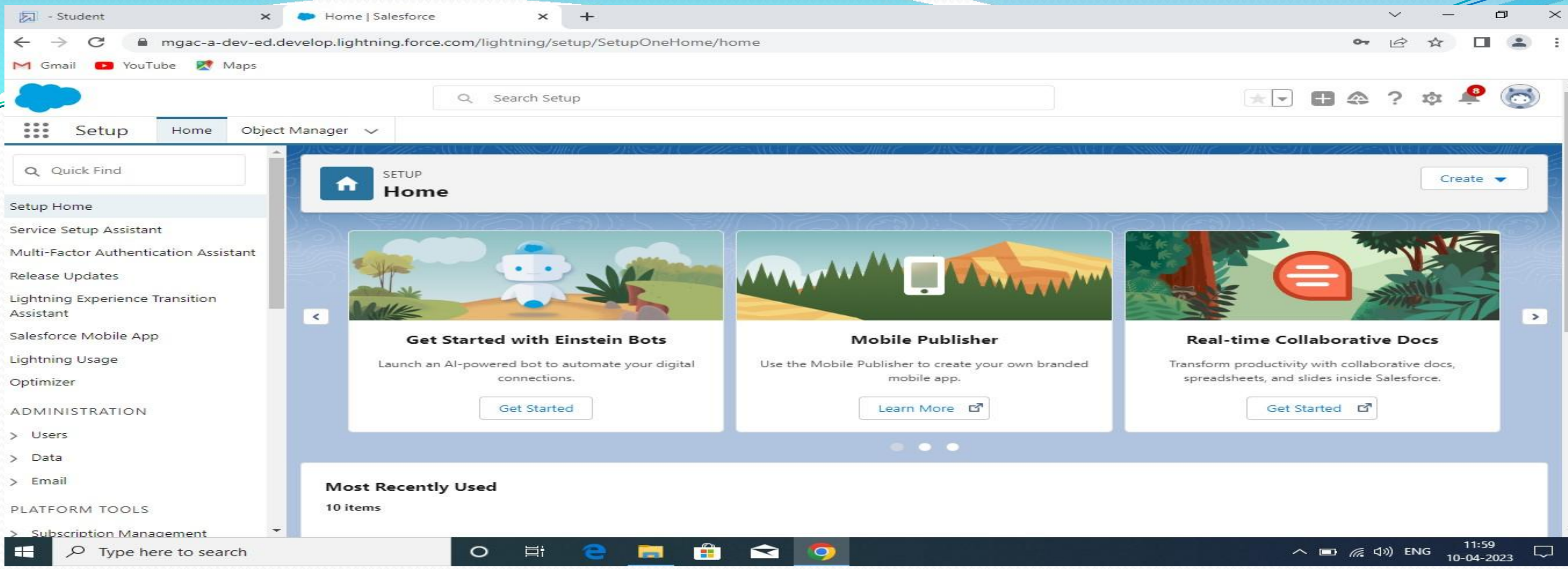
- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

On the Custom Object Definition page, create the object as follows :

- Label : Semester
- Plural Label : Semesters
- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

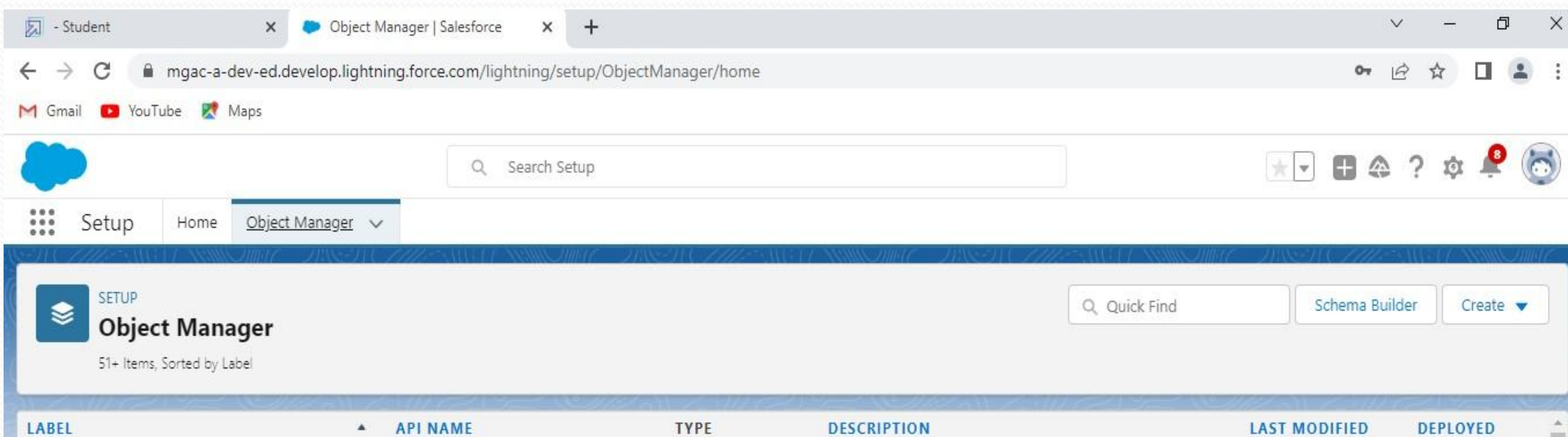
To Navigate to Setup page :

Click on gear icon → click setup



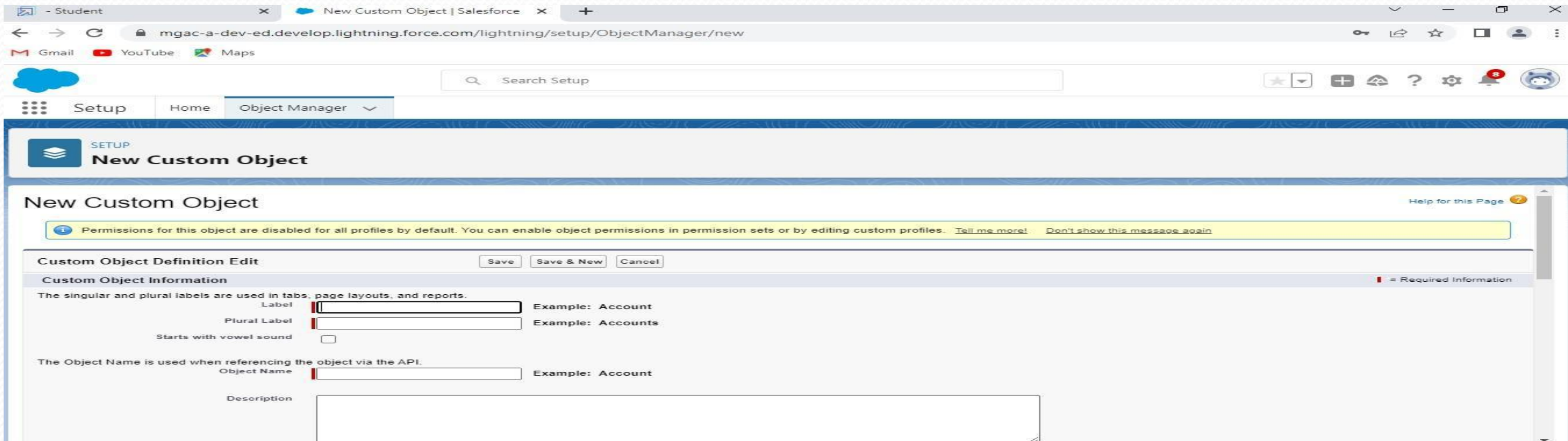
To create an object:

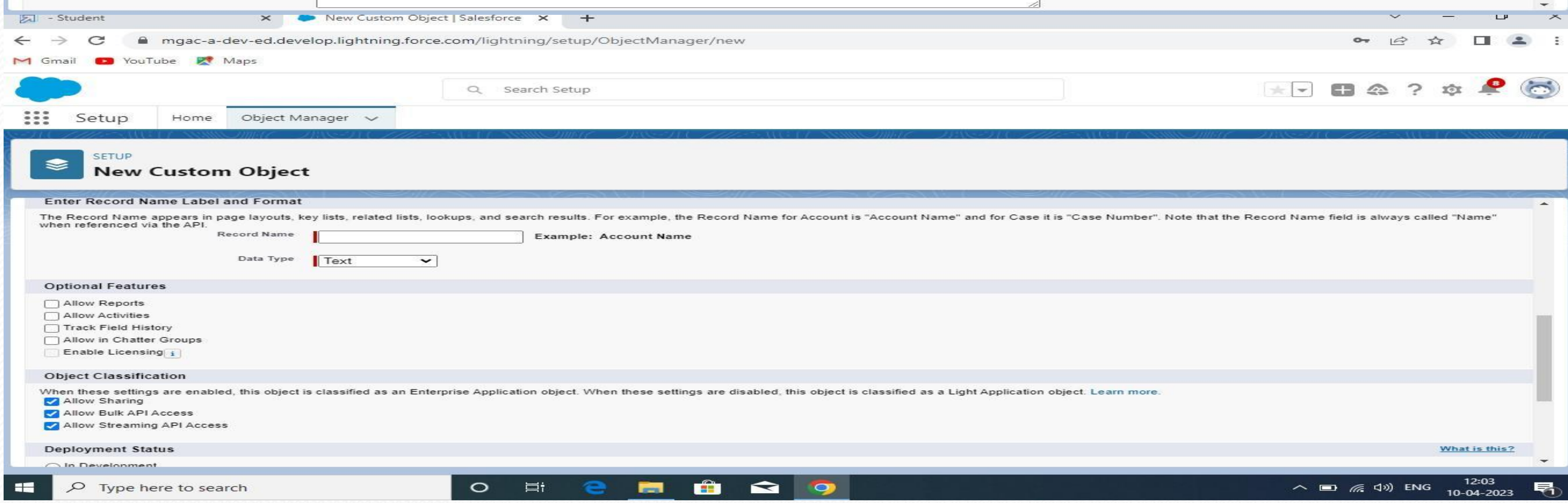
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



On Custom object defining page :

Enter the label name, plural label name, click on Allow reports, Allow search → Save





Activity-2 : Follow Similar steps to create Candidate , Course Details , Lecturer Details , Internal results Objects

Milestone -2 : Fields and Relationship :

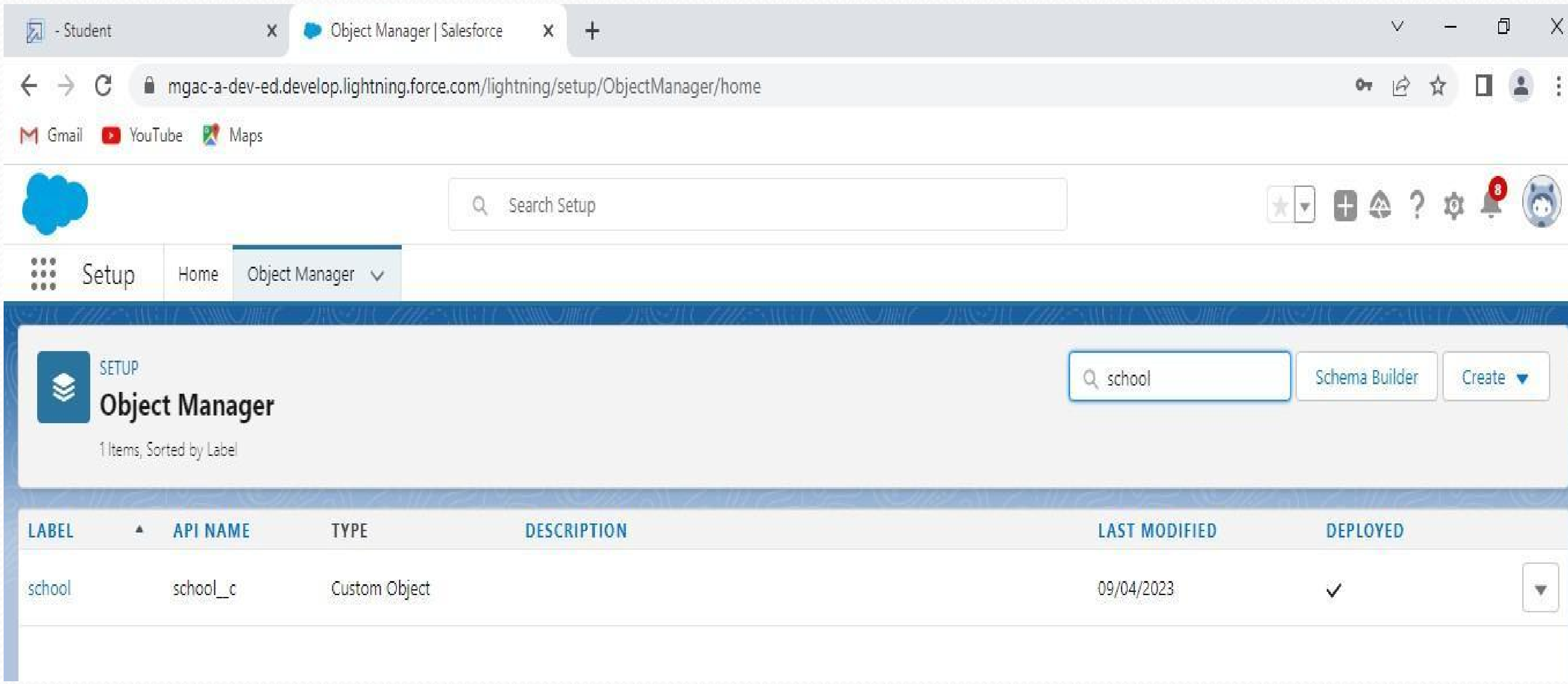
Activity-1 :
Creation of fields :

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Semester.
- Select Fields & Relationships from the left navigation, and click New
  Now ready to make a custom field. Let's do this!
- Select the Text as the Data Type, then click Next

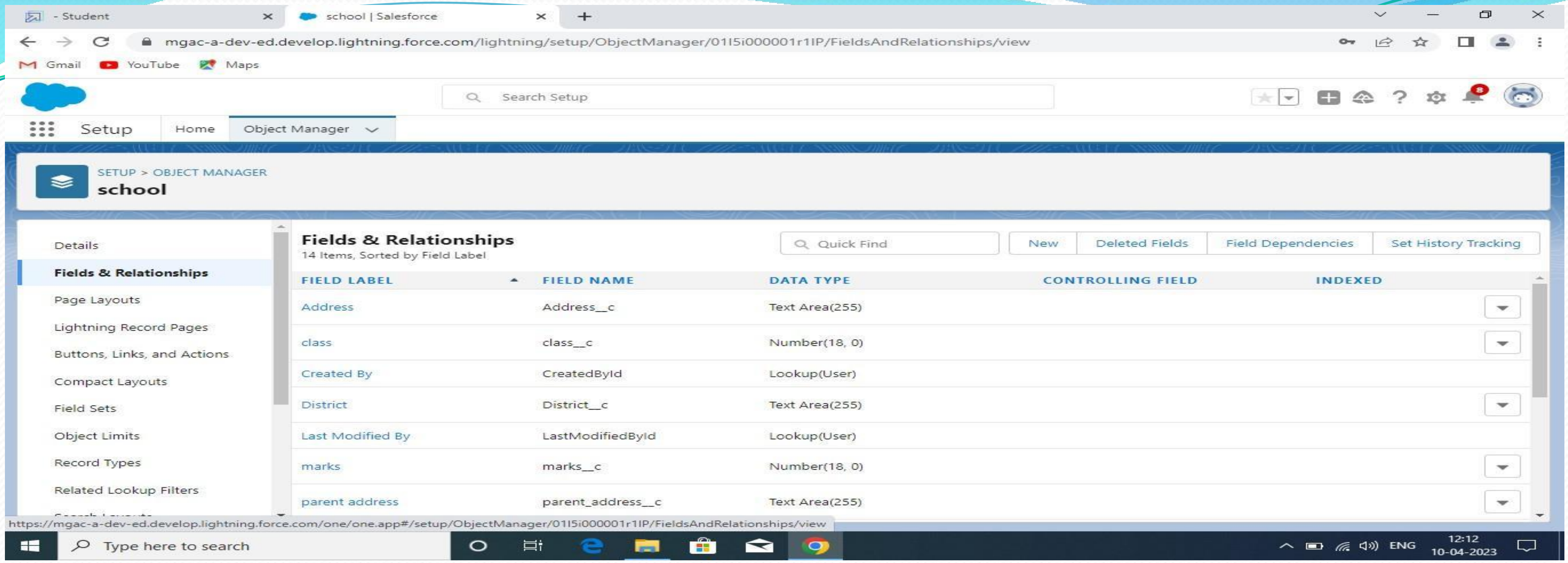
- For Field Label, Enter Semester Name.
- Click Next, Next, then Save

To create fields in an object:

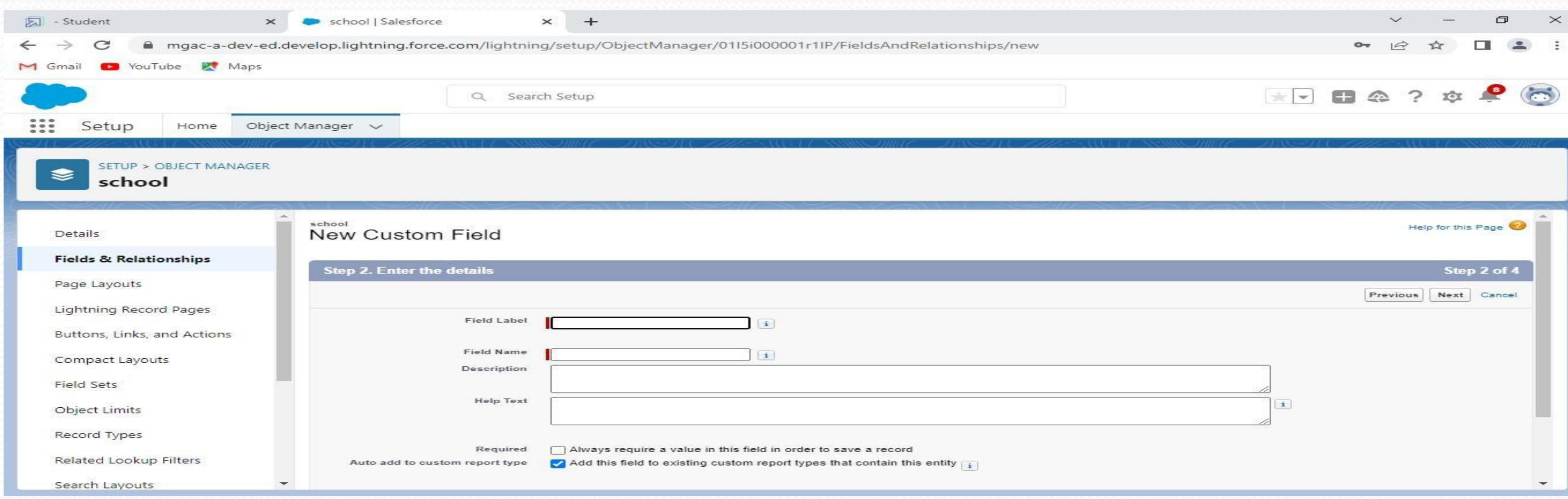
Go to setup → click on Object Manager → type object name in search bar → click on the object.



Now click on "Fields & Relationships" → New



Fill the field label name → Next → Next → Save.



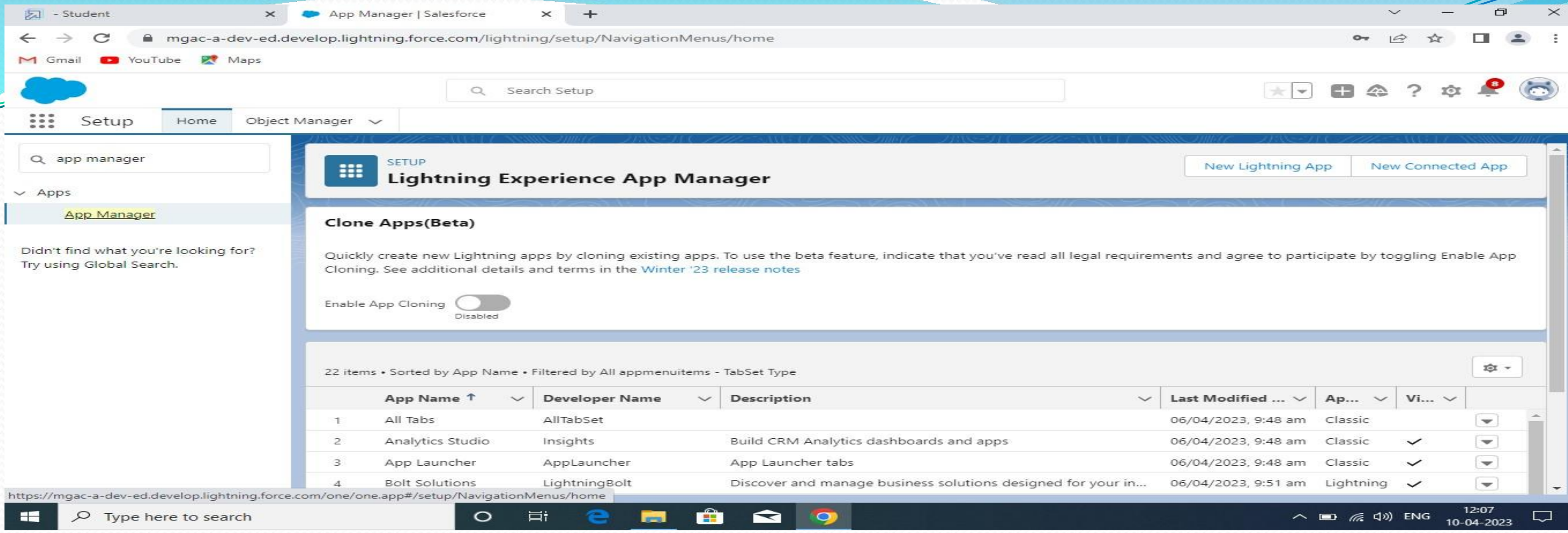
Activity-2 : Similarly Create Following Fields according to the objects.

Milestone-3 : Lightning App

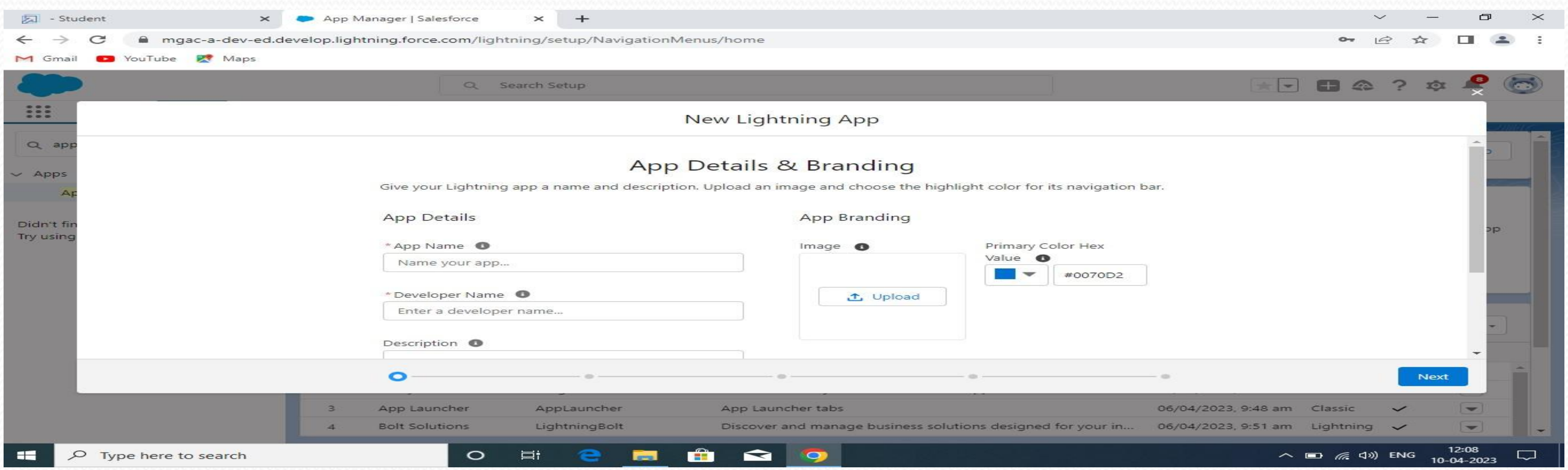
Activity-1 :
Create the Candidate Internal Result Card app :

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Candidate Internal Result Card as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Semester , Candidate , Course Details , Lecturer Details , Internal Results and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.

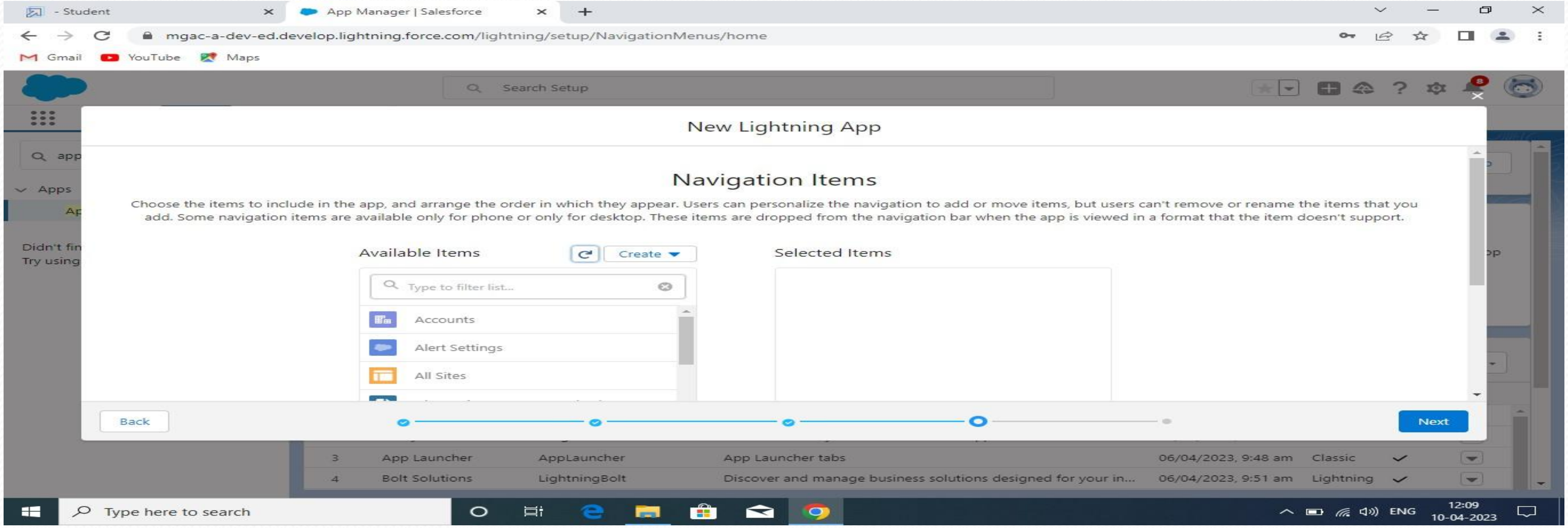
To create a lightning app page:
Go to setup page → search "app manager" in quick find → select "app manager" → click on New lightning App



Fill the app name in app details and branding →Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next → (Add Navigation Items) → Next → (Add User Profile) Add System Administrator → Next.



To Add Navigation Items :
Select the items from the search bar and move it using the arrow button → Next.



To Add User Profiles :
Search profiles in search bar → click on the arrow button → save & finish.

Milestone-4 : Users

Activity 1 :
Creating a Users :

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.

3. Enter the user's name John Martin and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role**(none)
5. Select a User Licence As sales force.
6. Select a profile as Sales force 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.

Milestone-5 : Reports

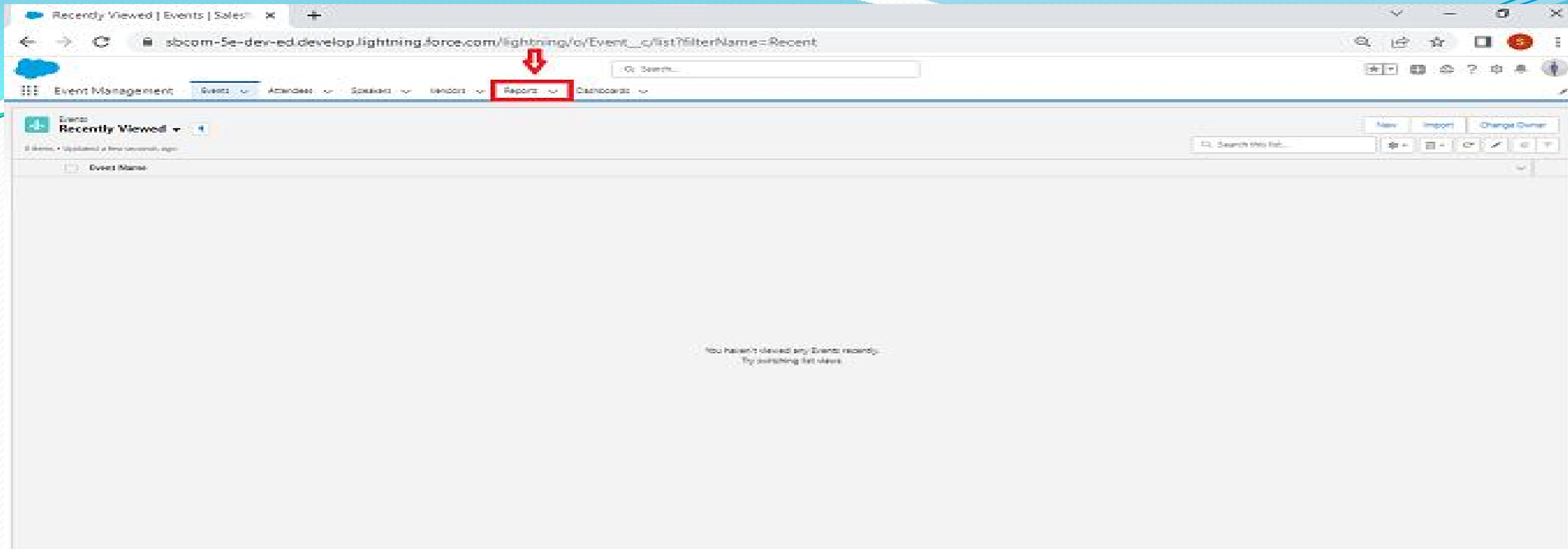
Activity 1 :

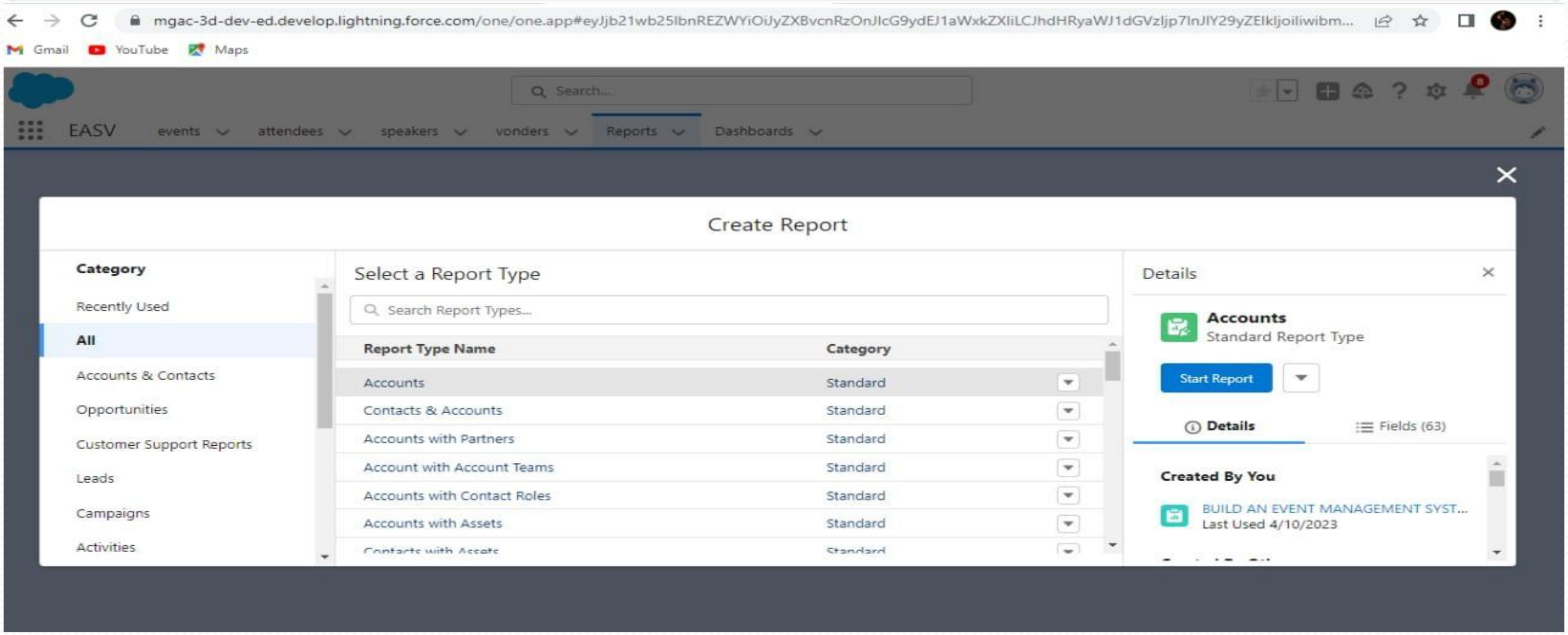
Reports and dashboards :

1. From the Reports tab, click New Report.
2. Select the report type as Candidate with candidate Marks for the report, and click Create.
3. Customise your report, then save or run it.

To create a report :
Go to the app → click on the reports tab

Click New Report


Recently Viewed | Events | Sales
sbcom-5e-dev-ed.develop.lightning.force.com/lightning/o/Event__c/list?filterName=Recent
Event Management
Events
Attendees
Speakers
Vendors
Reports
Dashboards
Recently Viewed
Event Name


mgac-3d-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJlY29yZElkIjoiIiwibm...
Gmail
YouTube
Maps
Search...
EASV
events
attendees
speakers
vonders
Reports
Dashboards
Create Report
Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Select a Report Type
Search Report Types...
Report Type Name
Category
Accounts
Standard
Contacts & Accounts
Standard
Accounts with Partners
Standard
Account with Account Teams
Standard
Accounts with Contact Roles
Standard
Accounts with Assets
Standard
Details
Accounts
Standard Report Type
Start Report
Details
Fields (63)
Created By You
BUILD AN EVENT MANAGEMENT SYST...
Last Used 4/10/2023

Customize your report, then save or run it.

Milestone-6 : Dashboards :

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

Activity 1 :

Create a Dashboard :

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name your dashboard Candidate Board . Leave all other fields as is and click Create.
4. Click + Component.
5. For Report, select Candidate Mark sby Stage. Click Select. ...
6. For Display As, select Vertical Bar Chart and click Add.
7. Click Save.
8. Click Done