

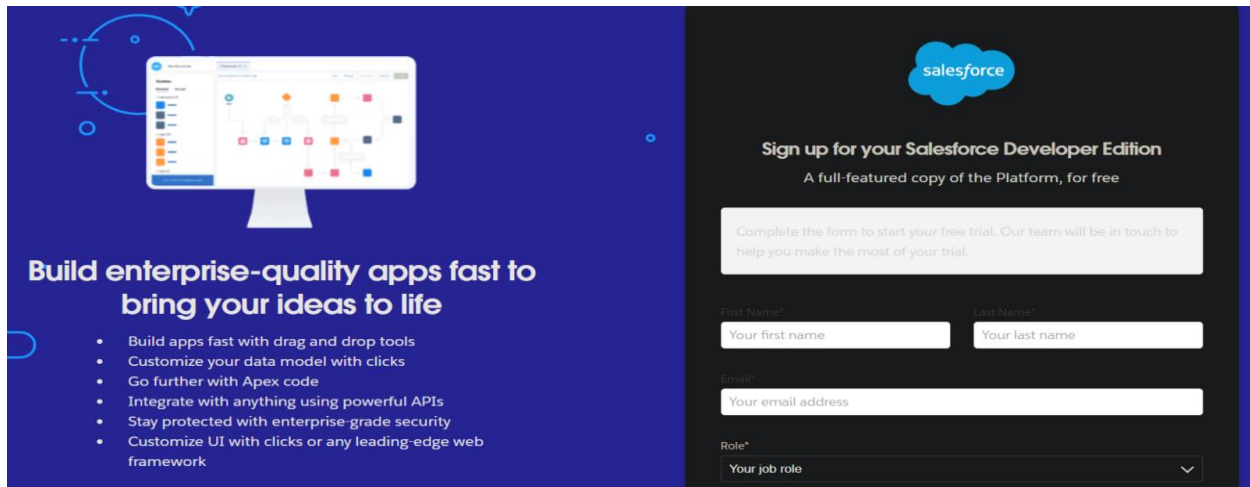
## Project Report

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

#### Creating Salesforce Org:

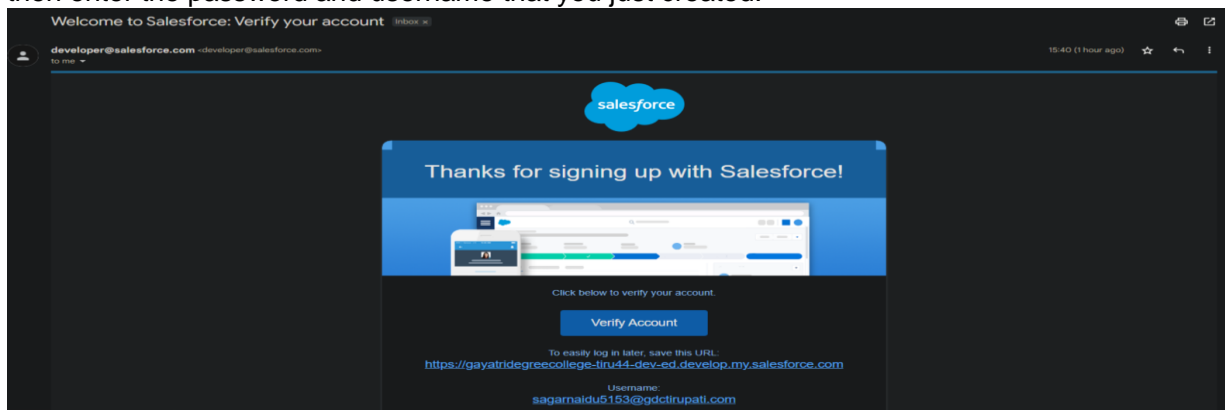
##### Creating Developer Org:

- Go to [developers.salesforce.com/signup](https://developers.salesforce.com/signup)
- Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name- Sagar & Pothuri
- Email- [sagarnaidu5153@gmail.com](mailto:sagarnaidu5153@gmail.com)
- Role : Developer
- Company : College Name- GAYATRI DEGREE COLLEGE - TIRUPATI
- County : India
- Postal Code : pin code-517501
- Username : [sagarnaidu5153@gdctirupati.com](https://sagarnaidu5153@gdctirupati.com)



##### 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 and go to [salesforce.com](https://salesforce.com) and click on login then enter the password and username that you just created.

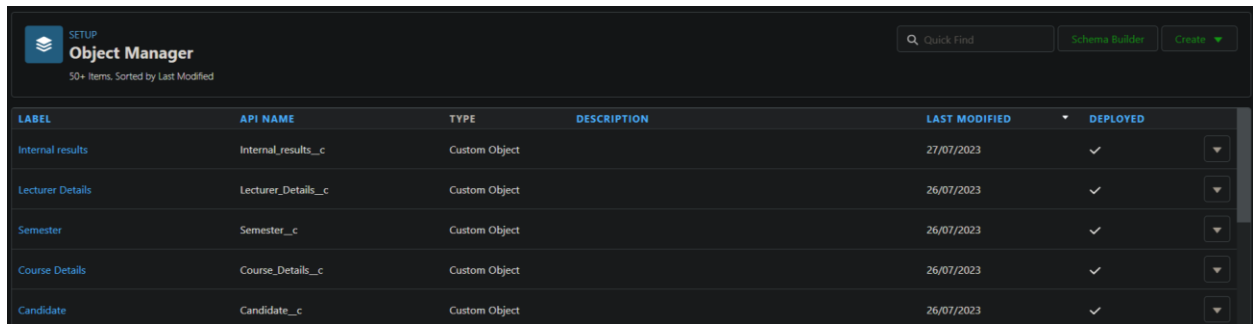


## Object:

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

**Standard Objects:** Account, Contact, Opportunity.

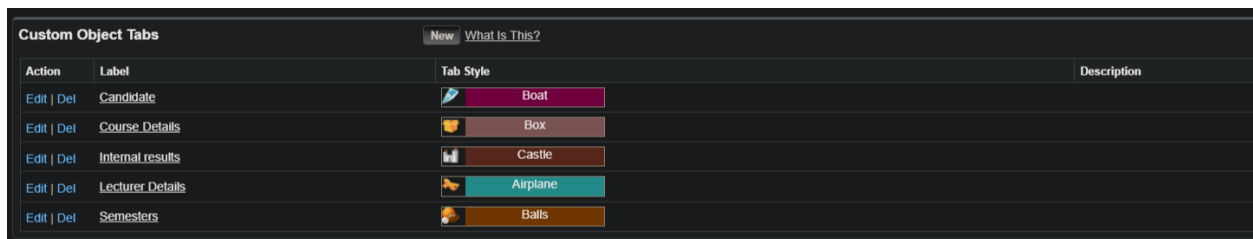
**Custom objects:** Semester, Candidate, Customer Details, Lecturer Details and Internal Results



The screenshot shows the 'Object Manager' interface in Salesforce. At the top, there's a 'SETUP' button and 'Object Manager' title. Below the title, it says '50+ Items, Sorted by Last Modified'. There are search and action buttons: 'Quick Find', 'Schema Builder', and 'Create'. The main table lists custom objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are Internal results, Lecturer Details, Semester, Course Details, and Candidate, all of type 'Custom Object' and created on 26/07/2023.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Internal results	Internal_results__c	Custom Object		27/07/2023	✓
Lecturer Details	Lecturer_Details__c	Custom Object		26/07/2023	✓
Semester	Semester__c	Custom Object		26/07/2023	✓
Course Details	Course_Details__c	Custom Object		26/07/2023	✓
Candidate	Candidate__c	Custom Object		26/07/2023	✓

After creating objects , created tabs for each object respectively as follows:



The screenshot shows the 'Custom Object Tabs' configuration page. It has a 'New' button and a 'What Is This?' link. The table lists tabs for each custom object with columns: Action, Label, Tab Style, and Description. The tabs are: Candidate (Boat style), Course Details (Box style), Internal results (Castle style), Lecturer Details (Airplane style), and Semesters (Balls style).

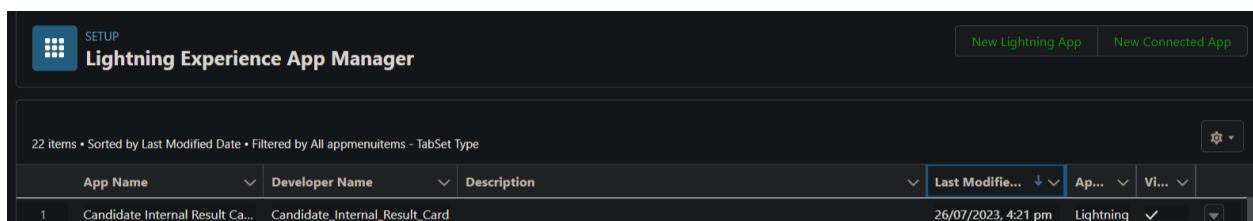
Action	Label	Tab Style	Description
Edit   Del	Candidate	Boat	
Edit   Del	Course Details	Box	
Edit   Del	Internal results	Castle	
Edit   Del	Lecturer Details	Airplane	
Edit   Del	Semesters	Balls	

## Lightning App:

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

**Standard App:** Bolt Solutions

**Custom App:** Candidate Internal Result Card



The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below, it says '22 items • Sorted by Last Modified Date • Filtered by All appmenuitems - TabSet Type'. The table lists apps with columns: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. One app is listed: 'Candidate Internal Result Ca...' with developer 'Candidate\_Internal\_Result\_Card', last modified '26/07/2023, 4:21 pm', and type 'Lightning'.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
1 Candidate Internal Result Ca...	Candidate_Internal_Result_Card		26/07/2023, 4:21 pm	Lightning	✓

## Fields And Relationship:

The below steps will assist in creating Fields.

- ❖ Click on the gear icon and then select Setup.
- ❖ Click on the object manager tab just beside the home tab.
- ❖ Search object (Lecturer Details) in quick find box.
- ❖ Click fields & relationships and click new
- ❖ Select text as data type click next
- ❖ Enter field label name Lecturer Role, enter length 40 and select next, next, and Save.
- ❖ Similarly create respective fields in custom objects with data type.

<div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Lecturer Details</div> </div>				
<div> <div>Details</div> <div>Fields &amp; Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> </div>	<div> <div>Fields &amp; Relationships</div> <div>6 Items, Sorted by Field Label</div> <div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div>			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
	Course	Course__c	Lookup(Course Details)	INDEXED
	Created By	CreatedById	Lookup(User)	
	Last Modified By	LastModifiedById	Lookup(User)	
	Lecturer Details Name	Name	Text(80)	INDEXED
	Lecturer Role	Lecturer_Role__c	Text(40)	
	Owner	OwnerId	Lookup(User,Group)	INDEXED

## Fields In Custom Objects With Data Type:

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
Lecturer Details	Semester Name	Lookup(Semester)
	Lecturer Name	Text(Standard field)
	Lecturer Role	Text
Course Details	Course	Lookup(Course)
	Course Name	Text(Standard field)
	Duration (Years)	Number
Internal results	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	Lookup(Course)
	Marks	Number

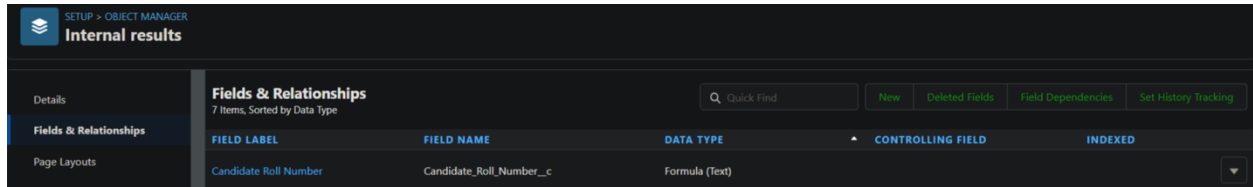
## Auto Number Field on Candidate Object:

<div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Candidate</div> </div>				
<div> <div>Details</div> <div>Fields &amp; Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> </div>	<div> <div>Fields &amp; Relationships</div> <div>6 Items, Sorted by Data Type</div> <div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div>			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
	Candidate Roll Number	Candidate_Roll_Number__c	Auto Number	INDEXED

## Number Field on Course Details Object:

<div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Course Details</div> </div>				
<div> <div>Details</div> <div>Fields &amp; Relationships</div> <div>Page Layouts</div> </div>	<div> <div>Fields &amp; Relationships</div> <div>6 Items, Sorted by Indexed</div> <div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div>			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
	Duration	Duration__c	Number(18, 0)	INDEXED

## Formula Field on Internal Results Object:



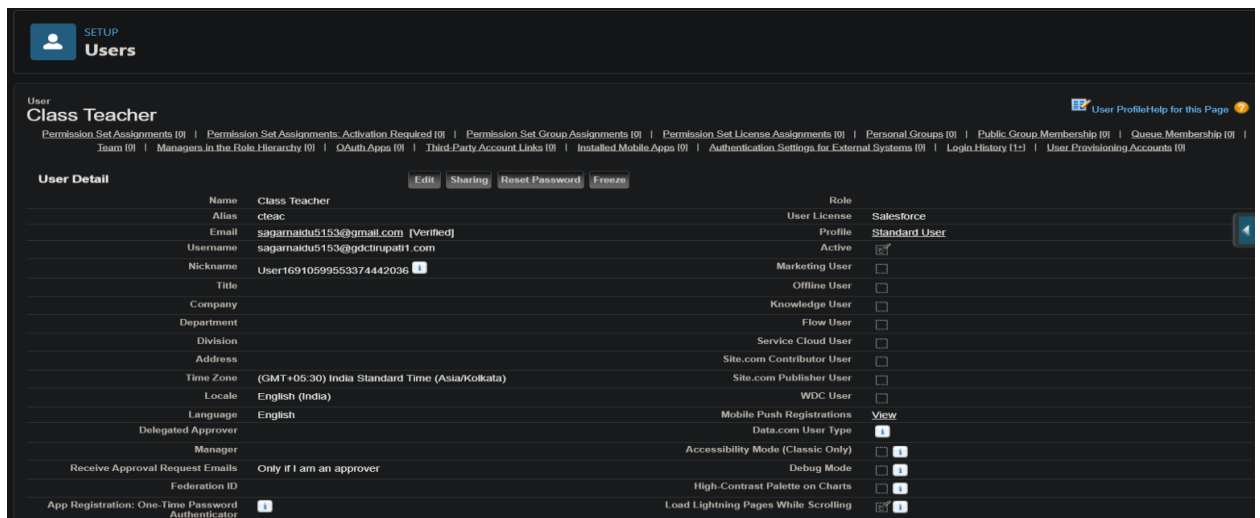
The screenshot shows the 'Internal results' object in Salesforce Setup. The 'Fields & Relationships' tab is active, displaying a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. One field is listed: 'Candidate Roll Number' with field name 'Candidate\_Roll\_Number\_\_c' and data type 'Formula (Text)'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Roll Number	Candidate_Roll_Number__c	Formula (Text)		

## Users:

### Creating A User:

- From Setup, in the Quick Find box, enter Users, and then select Users.
- Click New User.
- Enter the user's name Class Teacher 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.
- Select a User License As Salesforce.
- Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
- Click On Save.
- User will receive an email to reset password.
- Once user will finish it, would be able to login and use the system.



The screenshot shows the 'User Detail' page for a user named 'Class Teacher'. The page includes a header with the user's name and a 'User Profile Help for this Page' link. Below the header is a navigation bar with links to various setup areas. The main section is divided into two columns: 'User Detail' and 'Role'. The 'User Detail' column contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Federation ID. The 'Role' column contains fields for User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High Contrast Palette on Charts, and Load Lightning Pages While Scrolling.

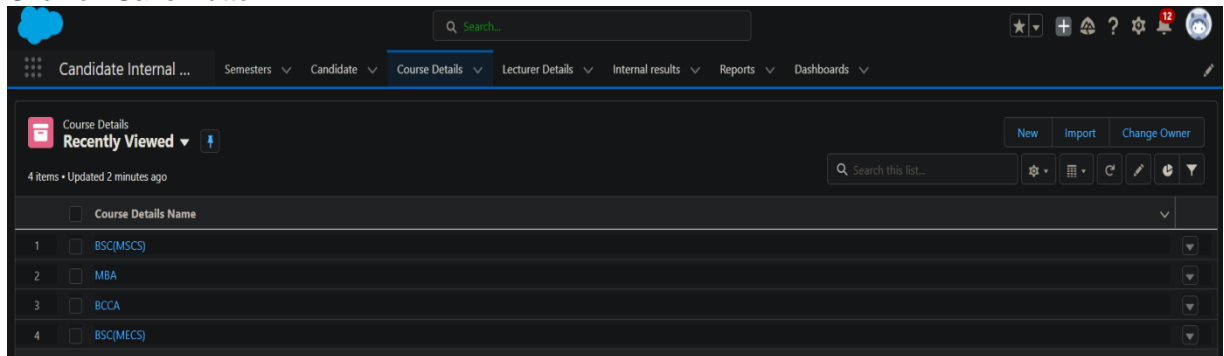
User Detail	Role
Name: Class Teacher	User License: Salesforce
Alias: cleac	Profile: Standard User
Email: sagarnaidu5153@gmail.com [Verified]	Active: <input checked="" type="checkbox"/>
Username: sagarnaidu5153@gdcitnupati.com	Marketing User: <input type="checkbox"/>
Nickname: User169105995537442036	Offline User: <input type="checkbox"/>
Title:	Knowledge User: <input type="checkbox"/>
Company:	Flow User: <input type="checkbox"/>
Department:	Service Cloud User: <input type="checkbox"/>
Division:	Site.com Contributor User: <input type="checkbox"/>
Address:	Site.com Publisher User: <input type="checkbox"/>
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User: <input type="checkbox"/>
Locale: English (India)	Mobile Push Registrations: View
Language: English	Data.com User Type: 1
Delegated Approver:	Accessibility Mode (Classic Only): <input type="checkbox"/>
Manager:	Debug Mode: <input type="checkbox"/>
Receive Approval Request Emails: Only if I am an approver	High Contrast Palette on Charts: <input type="checkbox"/>
Federation ID:	Load Lightning Pages While Scrolling: <input type="checkbox"/>
App Registration: One-Time Password Authenticator: 1	

## User Adoption:

### Create Record(Course Details):

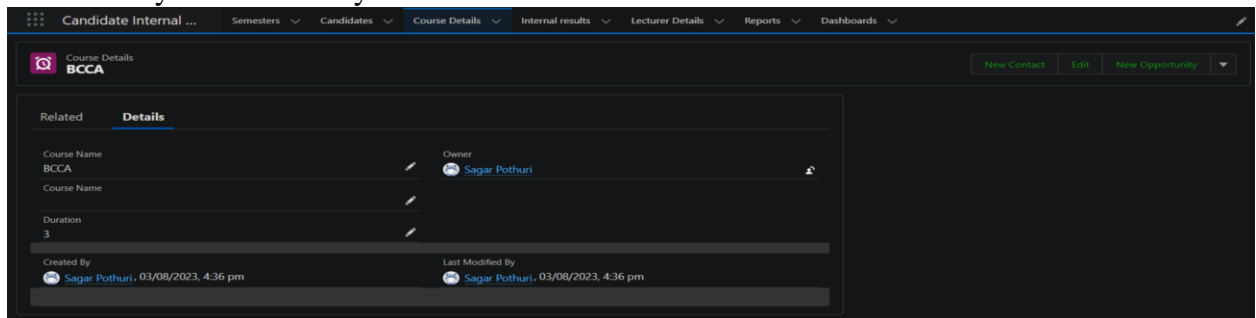
- Click on App Launcher on left side of screen.

- Search Candidate Internal Result Card & click on it.
- Click on Course Details tab.
- Click New button
- Fill all New Course details.
- Click on Save Button



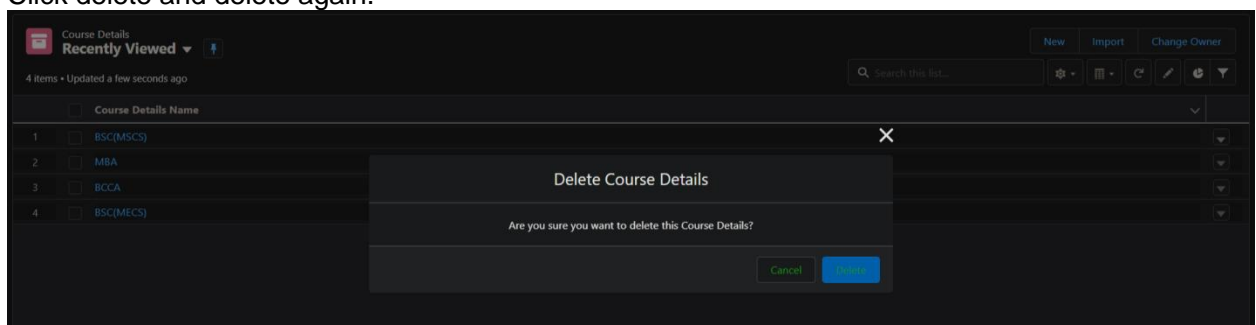
## View Record (Course Details):

- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card & click on it.
- Click on Course Details Tab.
- Click on any record name, you can see the details of the Course



## Delete Record (Course Details):

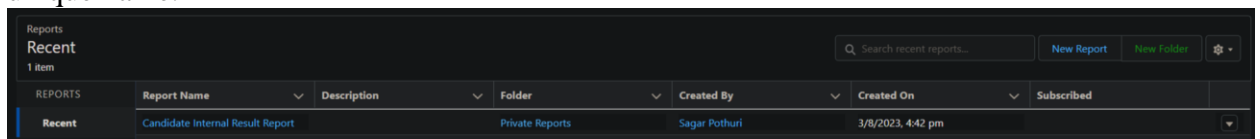
- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card & click on it.
- Click on Course Details Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.



## Report & Dashboards:

### Create Report:

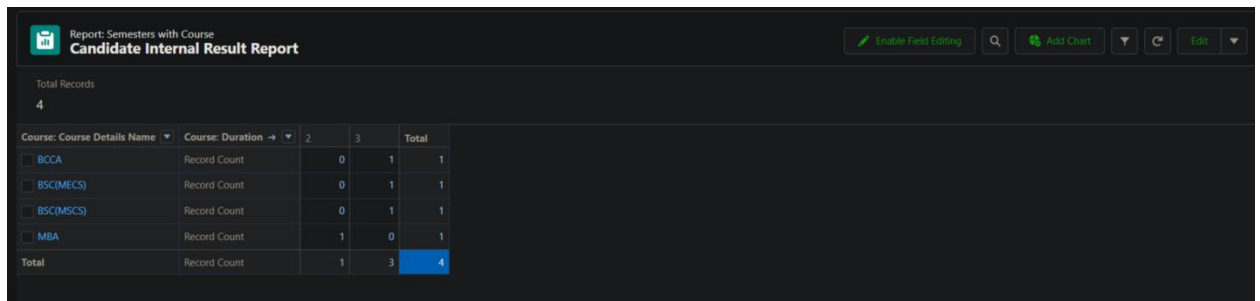
- ✓ Go to Reports and click New Report.
- ✓ Select the Semesters with Course Name report type and click Start Report.
- ✓ Customize your report, in group rows select – Course Name, in group columns select Duration(in this way we are making a Matrix Report)
- ✓ Click refresh.
- ✓ Click save and run
- ✓ Save your report as Candidate Internal Result Report and accept the auto-generated unique name.



REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report		Private Reports	Sagar Pothuri	3/8/2023, 4:42 pm	

### View Report:

- ✓ Click on Reports tab.
- ✓ Click on Candidate Internal Result Report and see records.



Course: Course Details Name	Course: Duration	2	3	Total
BCCA	Record Count	0	1	1
BSC(MECS)	Record Count	0	1	1
BSC(MSCS)	Record Count	0	1	1
MBA	Record Count	1	0	1
Total	Record Count	1	3	4

## Dashboards:

### Create Dashboard:

- ✓ Click the Dashboards tab.
- ✓ Click New Dashboard.
- ✓ Name the dashboard Candidate Internal Result Card and create.
- ✓ Click +Component.
- ✓ Select the Candidate Internal Result Card and click Select.

- ✓ For the data visualization select any of the chart, table, etc. as per our choice/requirement.
- ✓ Click Add and then Save.

Dashboards

Recent

1 item

Search recent dashboards...

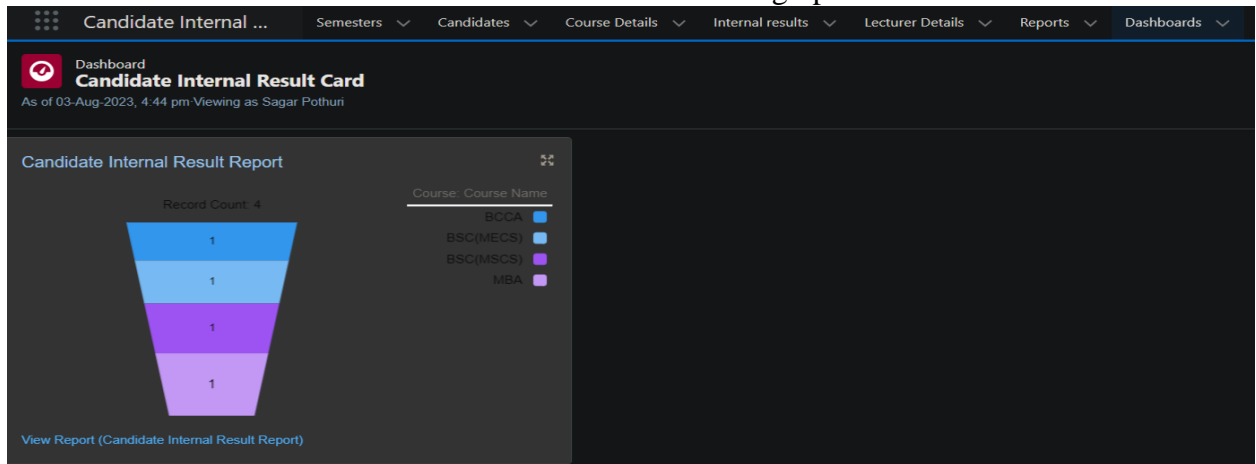
New Dashboard

New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed	
Recent	Candidate Internal Result Card		Private Dashboards	Sagar Pothuri	3/8/2023, 4:43 pm		

## View Dashboard:

- ✓ Click on Dashboards tab.
- ✓ Click on Candidate Internal Result Card dashboard and see graph view of records.



<----- THE END ----->