**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*
- ➢ Click on sign up.
- ➢ On the sign up form, enter the following details :
- ➢ First name & Last name- Karthik Kumar & Yellampati
- ➢ Email- karthikkumaryellampati@gmail.com
- ➢ Role : Developer
- ➢ Company : College Name- GAYATRI DEGREE COLLEGE - TIRUPATI
- ➢ County : India
- ➢ Postal Code : pin code-517501
- ➢ Username : karthikkumaryellampati@gdctirupati.com
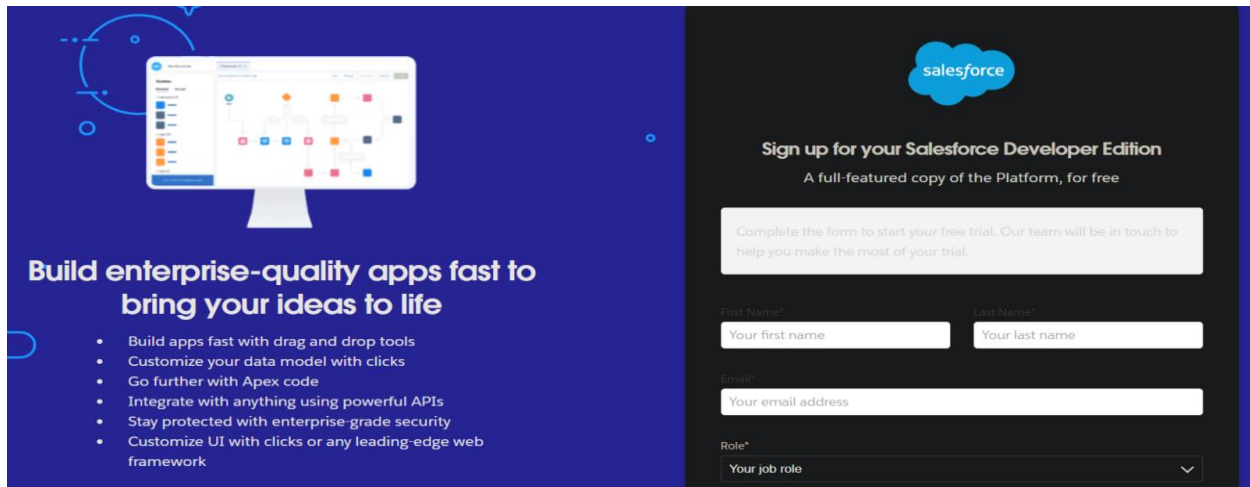
Account Activation:

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 and click on login then enter the password and username that you just created.
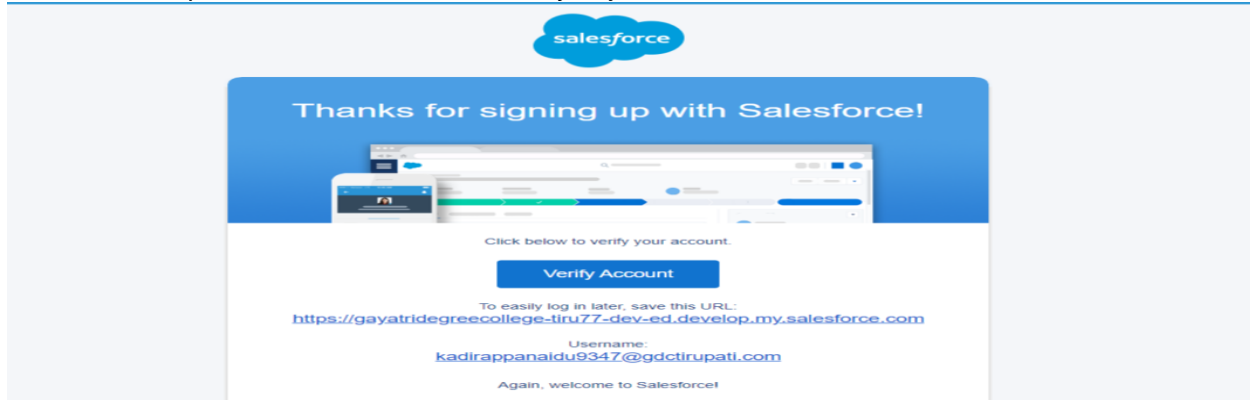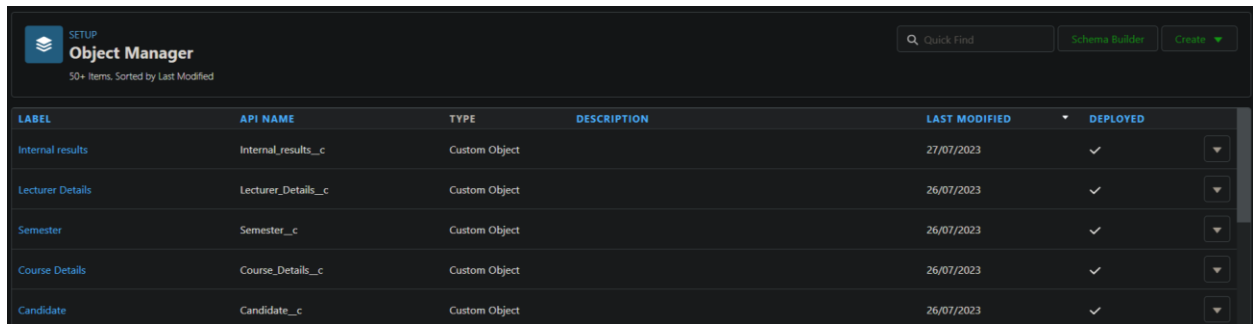
Object:

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:
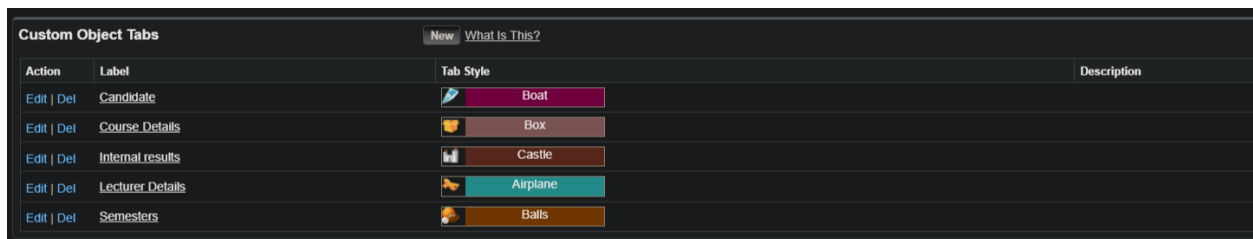
Standard Objects: Account, Contact, Opportunity.

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

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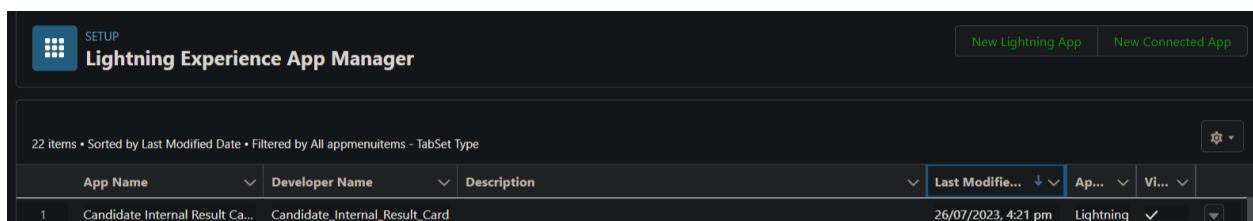
Lightning App:

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

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.

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
	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
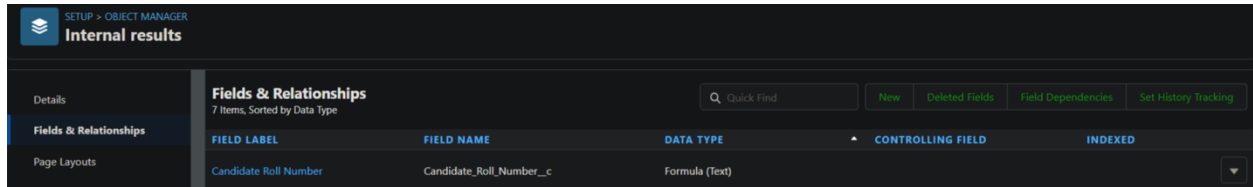
Auto Number Field on Candidate Object:

Number Field on Course Details Object:

Formula Field on Internal Results Object:

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.
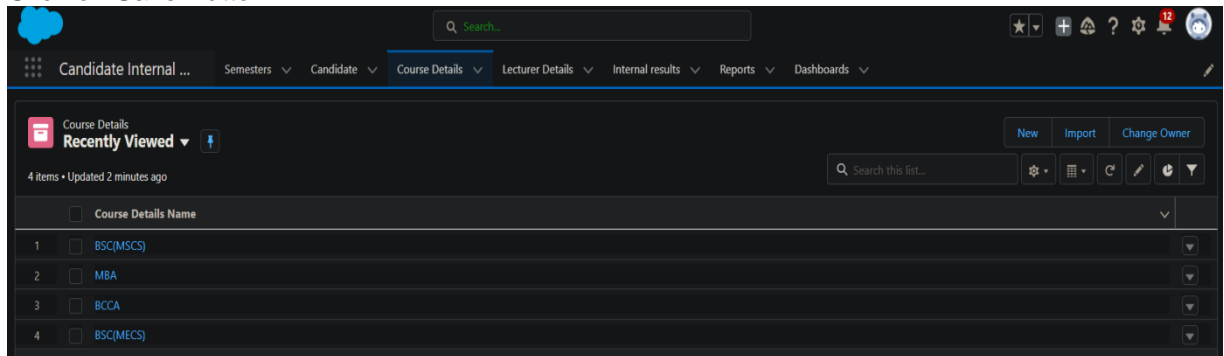- Once user will finish it, would be able to login and use the system.

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.
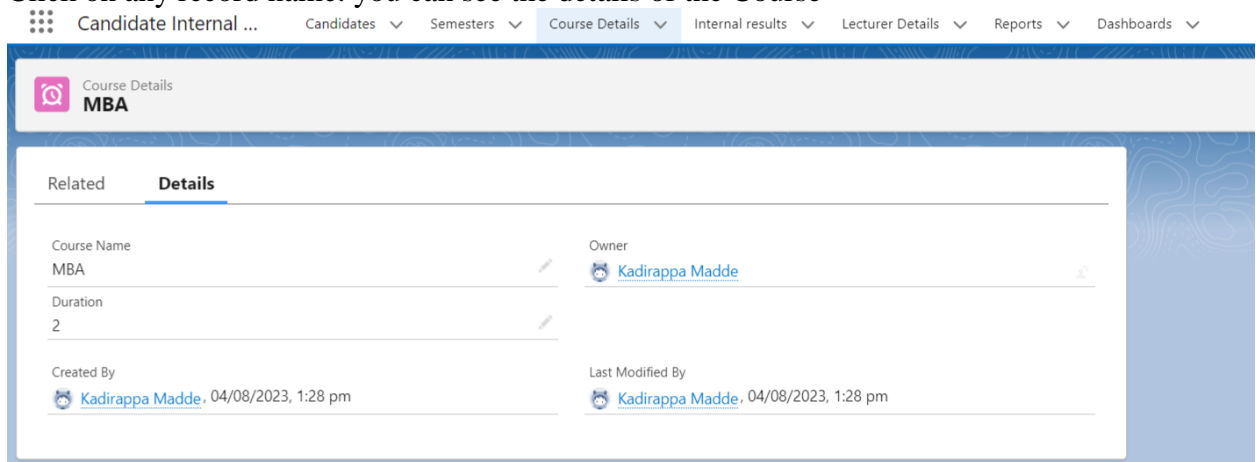- Click on any record name. you can see the details of the Course
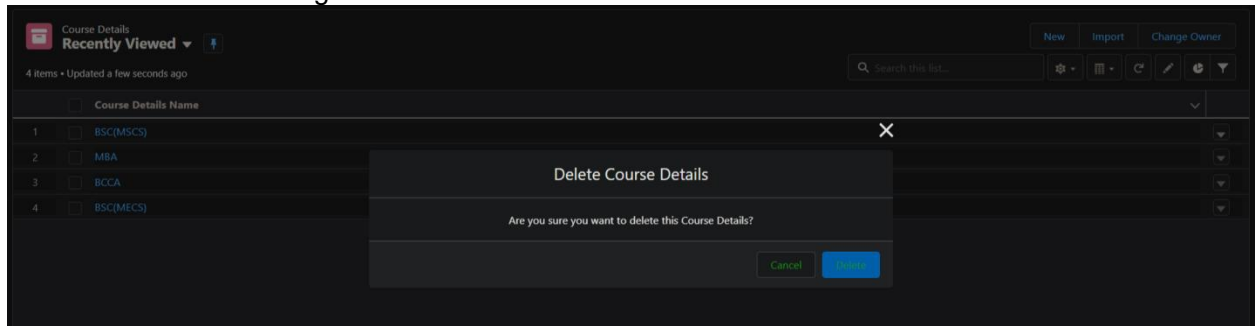

Delete Record (Course Details):

- 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.

View Report:

✓ Click on Reports tab.
✓ Click on Candidate Internal Result Report and see records.
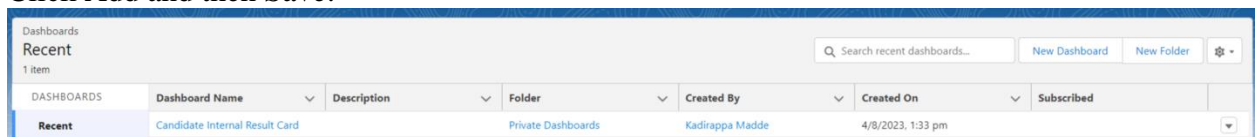
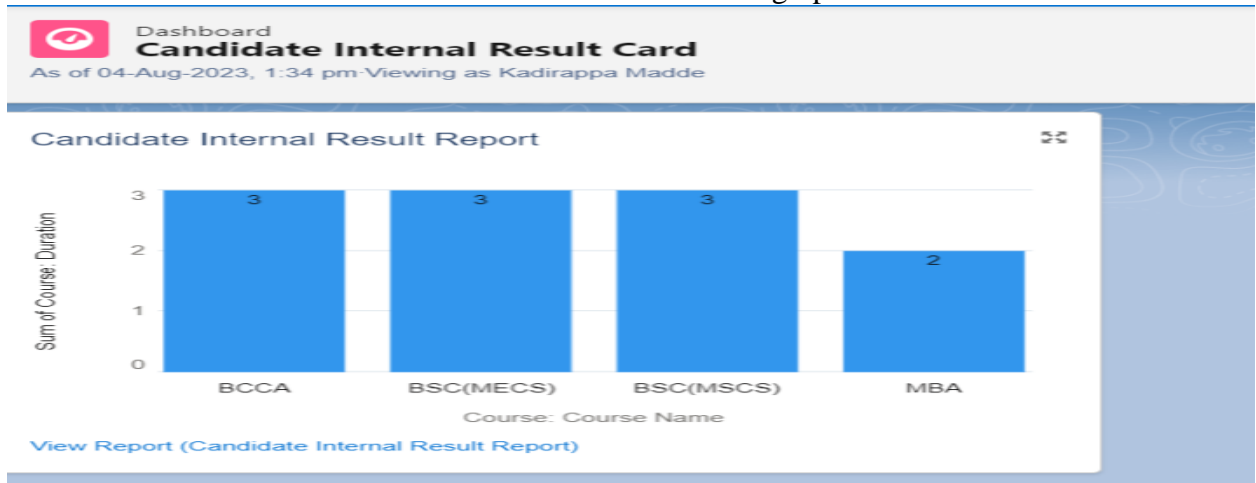## Dashboards:

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.

View Dashboard:

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

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