

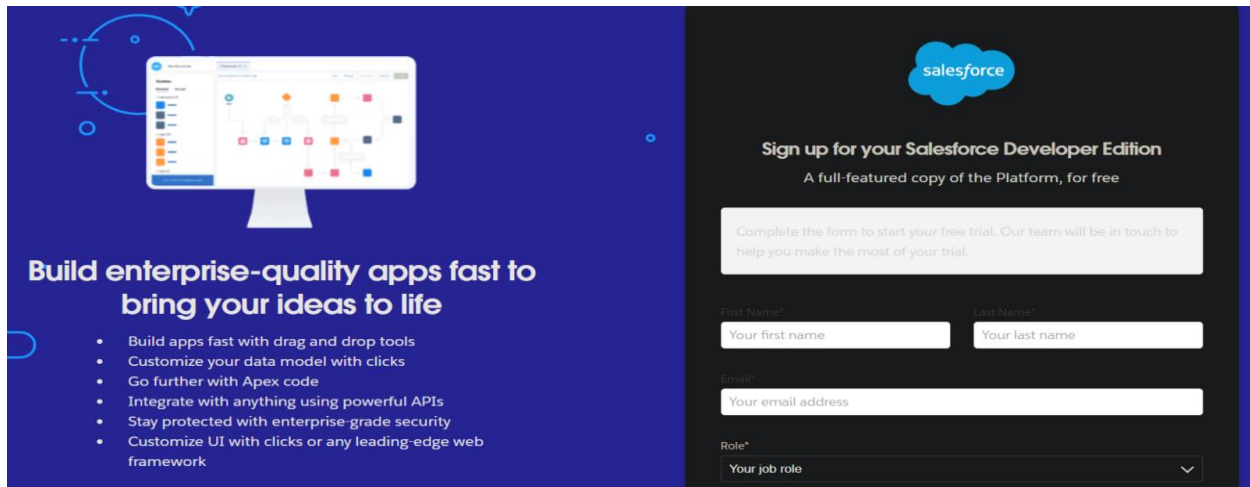
Project Report

Implementing CRM For Result Tracking Of A Candidate With Internal Marks

Creating Salesforce Org:

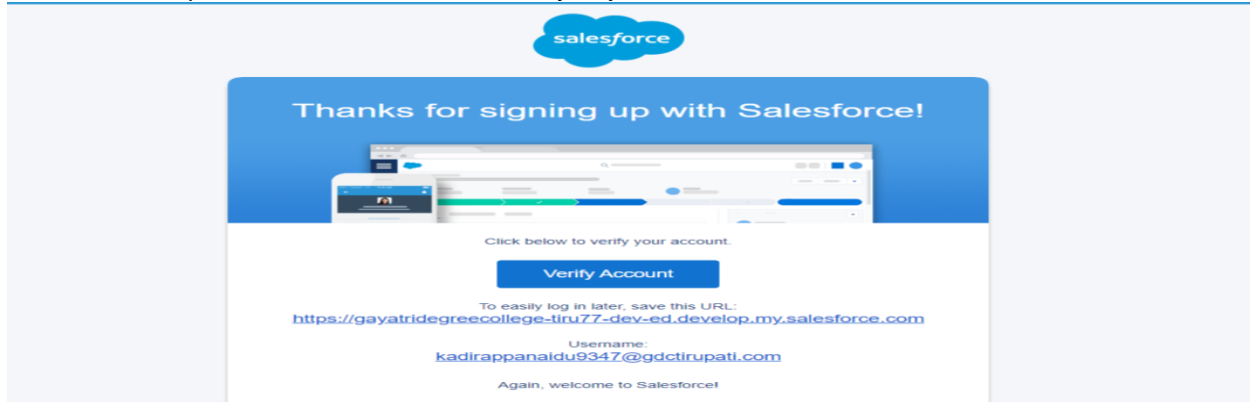
Creating Developer Org:

- Go to developers.salesforce.com/signup
- Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name- Kadirappa & Madde
- Email- kadirappanaidu9347@gmail.com
- Role : Developer
- Company : College Name- GAYATRI DEGREE COLLEGE - TIRUPATI
- County : India
- Postal Code : pin code-517501
- Username : kadirappanaidu9347@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.

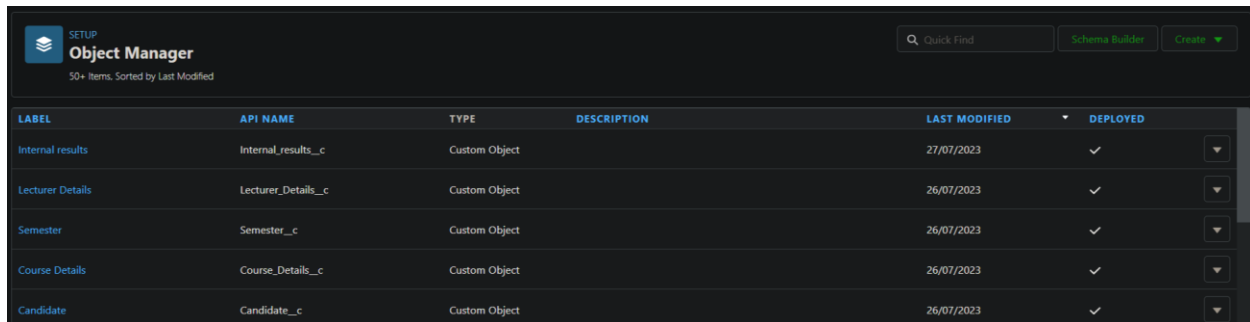


Object:

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.

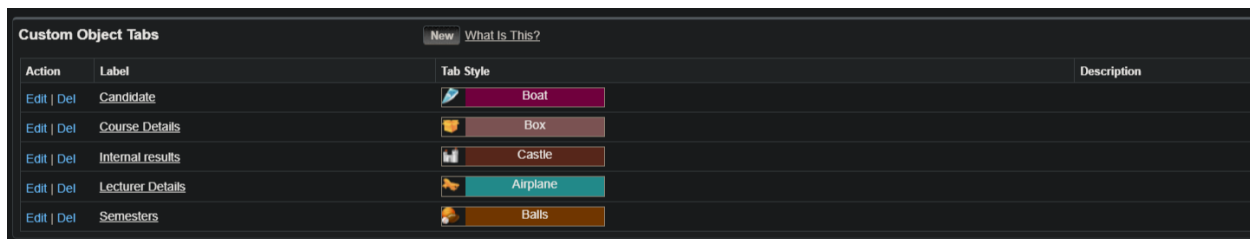
Custom objects: Semester, Candidate, Customer Details, Lecturer Details and Internal Results



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' page. It has a 'New' button and a link 'What Is This?'. The table lists tabs for different objects with columns: Action, Label, Tab Style, and Description. The tabs are for Candidate, Course Details, Internal results, Lecturer Details, and Semesters, each with a unique icon and color.

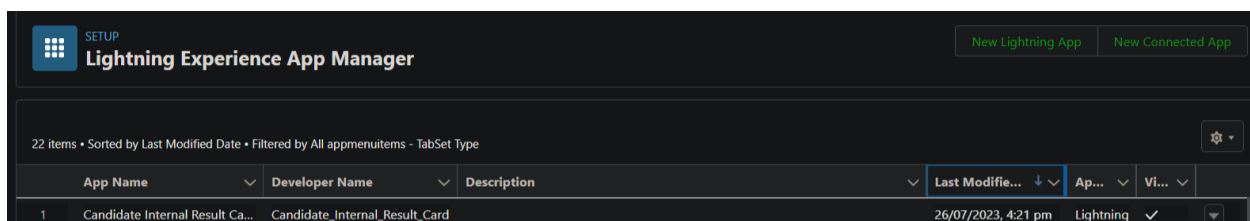
Action	Label	Tab Style	Description
Edit Del	Candidate	Boat	
Edit Del	Course Details	Box	
Edit Del	Internal results	Castle	
Edit Del	Lecturer Details	Airplane	
Edit Del	Semesters	Balls	

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's a 'SETUP' button and 'Lightning Experience App Manager' title. Below the title, it says '22 items • Sorted by Last Modified Date • Filtered by All appmenuitems - TabSet Type'. There are buttons for 'New Lightning App' and 'New Connected App'. The main table lists apps with columns: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The app listed is 'Candidate Internal Result Card'.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
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.



SETUP > OBJECT MANAGER

Lecturer Details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Fields & Relationships

6 Items, Sorted by Field Label

New

Deleted Fields

Field Dependencies


Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course_c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecturer Details Name	Name	Text(80)		✓
Lecturer Role	Lecturer_Role__c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓

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:

 SETUP > OBJECT MANAGER	Candidate				
Details					
Fields & Relationships					
Page Layouts					

Fields & Relationships				
6 Items, Sorted by Data Type				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Roll Number	Candidate_Roll_Number__c	Auto Number		

Number Field on Course Details Object:


[SETUP > OBJECT MANAGER](#)

Course Details

Details

Fields & Relationships

Page Layouts

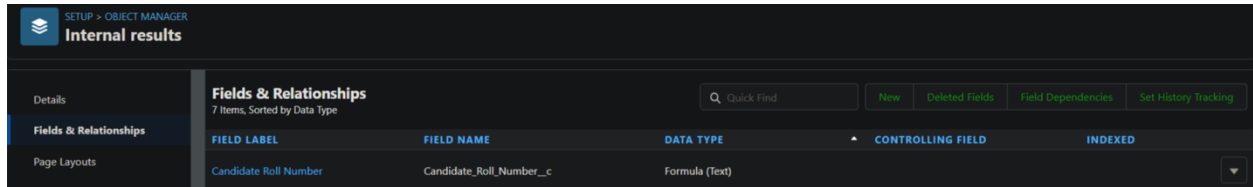
Fields & Relationships

6 Items, Sorted by Indexed

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Duration	Duration_c	Number(18, 0)		

Formula Field on Internal Results Object:



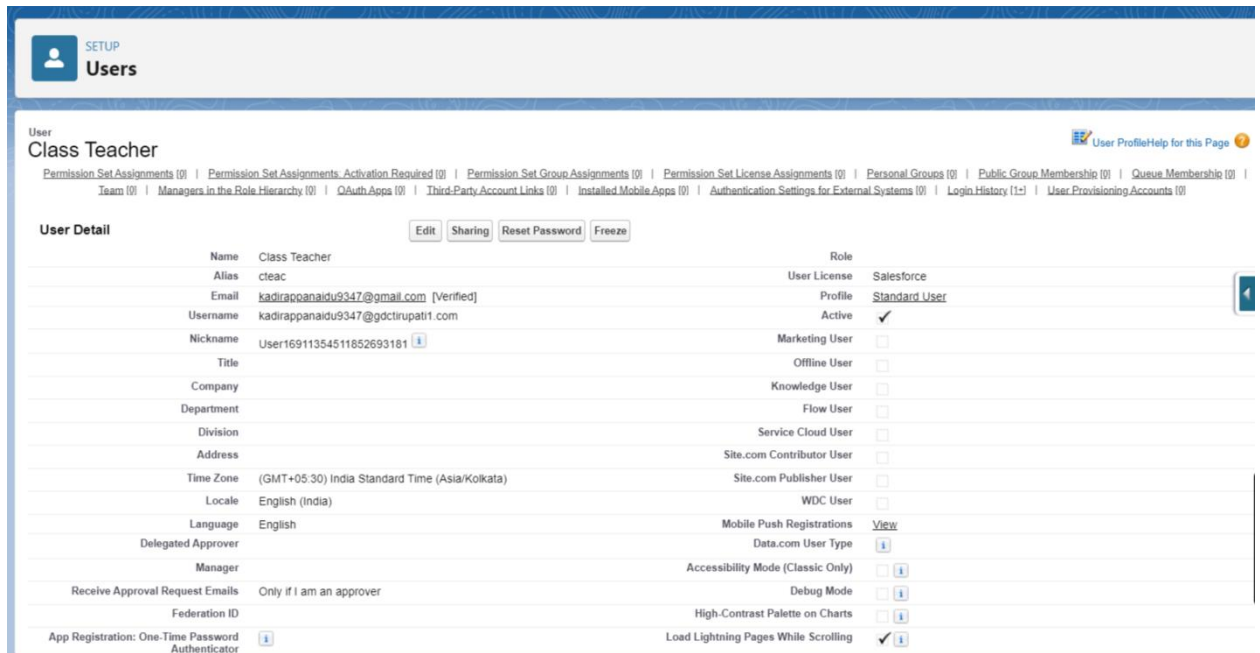
The screenshot shows the 'Internal results' object in the Salesforce Object Manager. The 'Fields & Relationships' tab is active, displaying a table with 7 items. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The first row shows a field labeled 'Candidate Roll Number' with the 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.



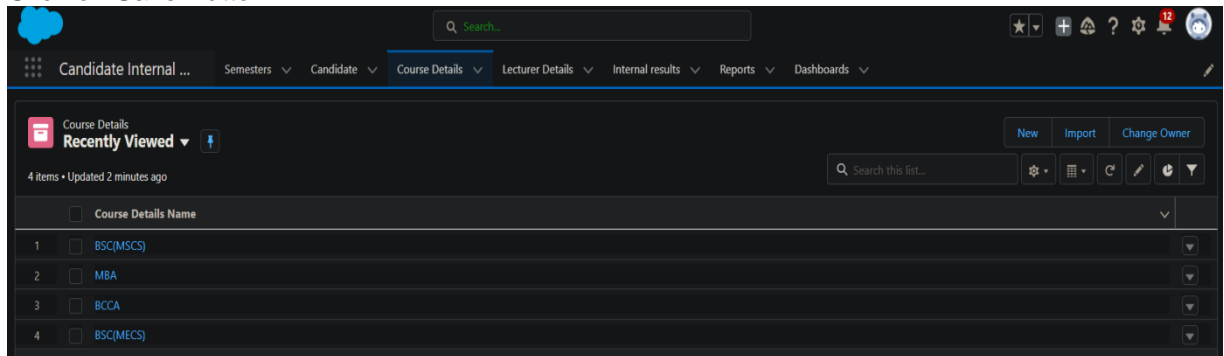
The screenshot shows the 'Users' page in Salesforce Setup. The user 'Class Teacher' is selected, and the 'User Detail' section is expanded. The user's name is 'Class Teacher', alias is 'cleac', email is 'kadirappanaidu9347@gmail.com', and username is 'kadirappanaidu9347@gdcitrapati1.com'. The user's role is 'Salesforce', profile is 'Standard User', and active status is checked. The user's nickname is 'User16911354511852693181'. The user's title, company, department, division, address, time zone, locale, language, delegated approver, manager, receive approval request emails, federation ID, app registration, and load lightning pages while scrolling are all set to default or empty.

Name	Class Teacher	Role
Alias	cleac	User License
Email	kadirappanaidu9347@gmail.com [Verified]	Profile
Username	kadirappanaidu9347@gdcitrapati1.com	Active
Nickname	User16911354511852693181	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on Charts
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling

User Adoption:

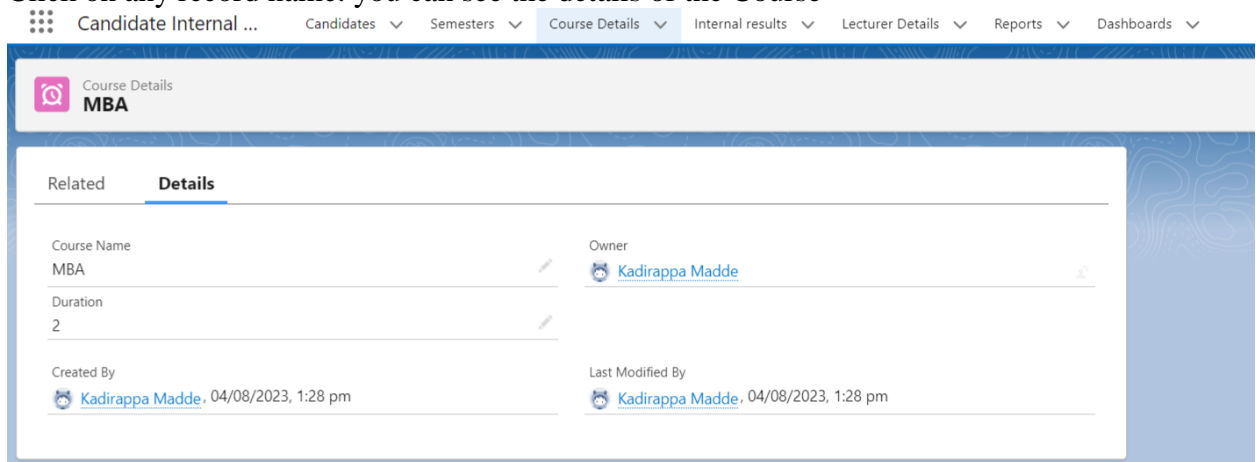
Create Record(Course Details):

- 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):

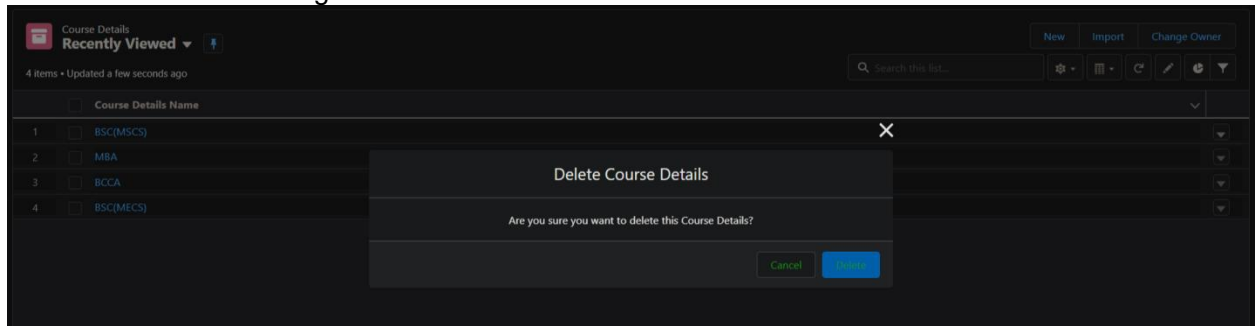
- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card & click on it.
- Click on Course Details Tab.
- Click on any record name. you can see the details of the Course



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						
Recent						
1 item						
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report		Private Reports	Kadirappa Madde	4/8/2023, 1:33 pm	

View Report:

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

Report: Semesters with Course

Candidate Internal Result Report

Enable Field Editing

Total Records

Total Course: Duration

4

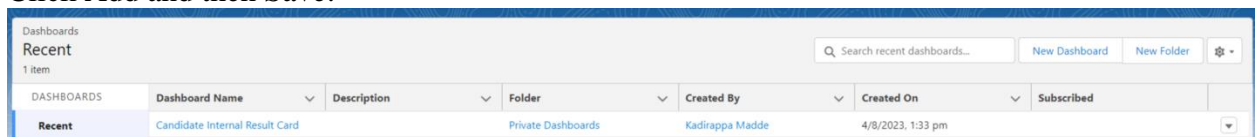
11

<input type="checkbox"/> Course: Course Name <div></div>	Course: Duration <div></div>	<div></div> Duration <div></div>
<input type="checkbox"/> BCCA (1)	3	Large Course
Subtotal	3	
<input type="checkbox"/> BSC(MECS) (1)	3	Large Course
Subtotal	3	
<input type="checkbox"/> BSC(MSCS) (1)	3	Large Course
Subtotal	3	
<input type="checkbox"/> MBA (1)	2	Medium Course
Subtotal	2	
Total (4)	11	

Dashboards:

Create Dashboard:

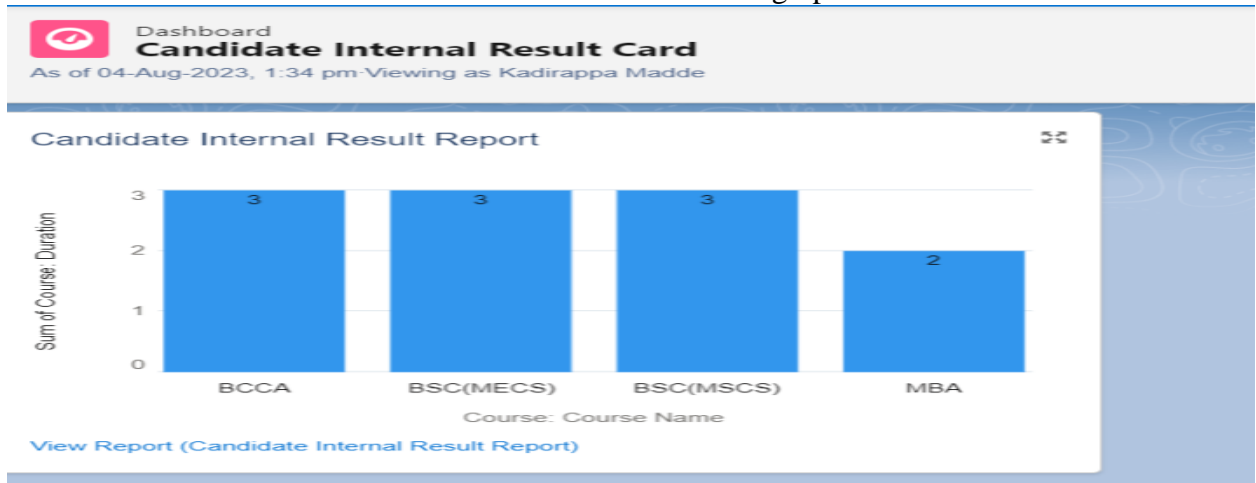
- ✓ Click the Dashboards tab.
- ✓ Click New Dashboard.
- ✓ Name the dashboard Candidate Internal Result Card and create.
- ✓ Click +Component.
- ✓ Select the Candidate Internal Result Card and click Select.
- ✓ For the data visualization select any of the chart, table, etc. as per our choice/requirement.
- ✓ Click Add and then Save.



DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	Kadirappa Madde	4/8/2023, 1:33 pm	

View Dashboard:

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



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