

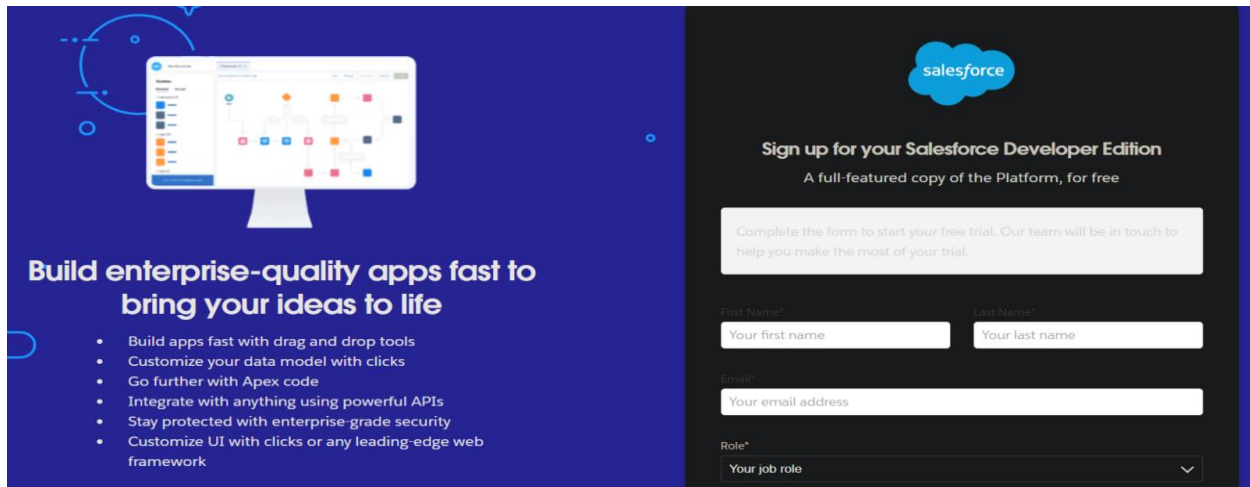
Project Report

Implementing CRM For Result Tracking Of A Candidate With Internal Marks

Creating Salesforce Org:

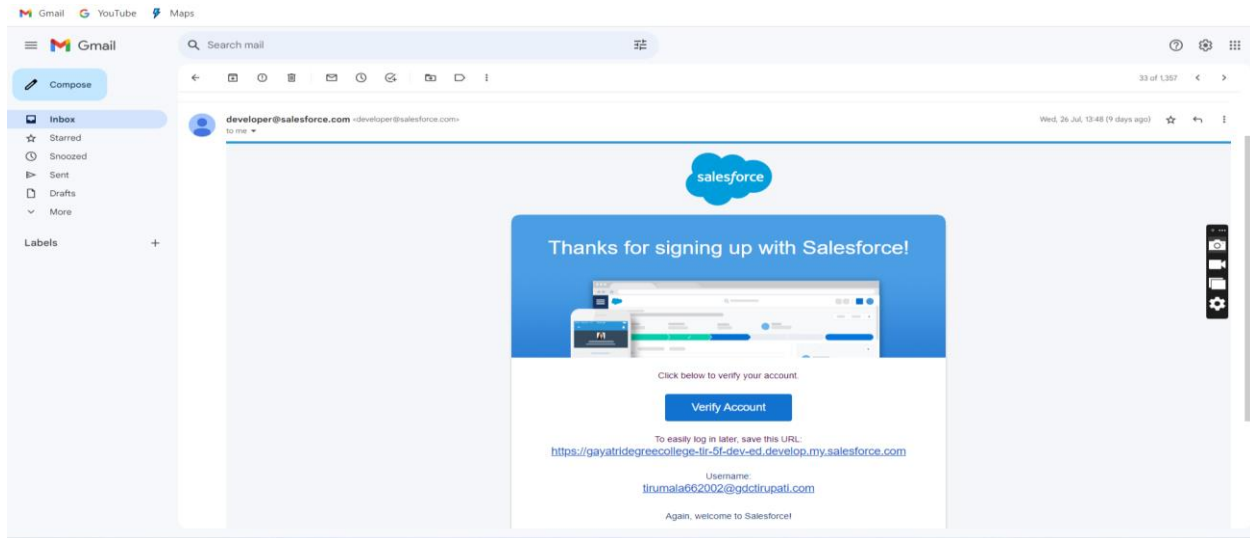
Creating Developer Org:

- Go to developers.salesforce.com/signup
- Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name- Sudharshan Tirumala
- Email- tirumalasudharshan123@gmail.com
- Role : Developer
- Company : College Name- GAYATRI DEGREE COLLEGE - TIRUPATI
- County : India
- Postal Code : pin code-517501
- Username : tirumala662002@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

<div> Object Manager </div> <div> <div>Quick Find</div> <div>Schema Builder</div> <div>Create</div> </div>					
50+ Items. Sorted by Last Modified					
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:

Custom Object Tabs			
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

Lightning Experience App Manager					
22 items • Sorted by Last Modified Date • Filtered by All appmenuitems - TabSet Type					
App Name	Developer Name	Description	Last Modified	Ap...	Vi...
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.

Lecturer Details				
Details	Fields & Relationships			
Fields & Relationships	6 Items, Sorted by Field Label			
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
Lightning Record Pages	Course	Course__c	Lookup(Course Details)	✓
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)	
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)	
Field Sets	Lecturer Details Name	Name	Text(80)	✓
Object Limits	Lecturer Role	Lecturer_Role__c	Text(40)	
Record Types	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	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:

SETUP > OBJECT MANAGER

Candidate

Details

Fields & Relationships

Page Layouts

Mocking Record Browser

Fields & Relationships

6 Items, Sorted by Data Type

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

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

Formula Field on Internal Results Object:

SETUP > OBJECT MANAGER

Internal results

Details

Fields & Relationships

Page Layouts

Fields & Relationships

7 Items, Sorted by Data Type

Quick Find

New

Deleted Fields

Field Dependencies

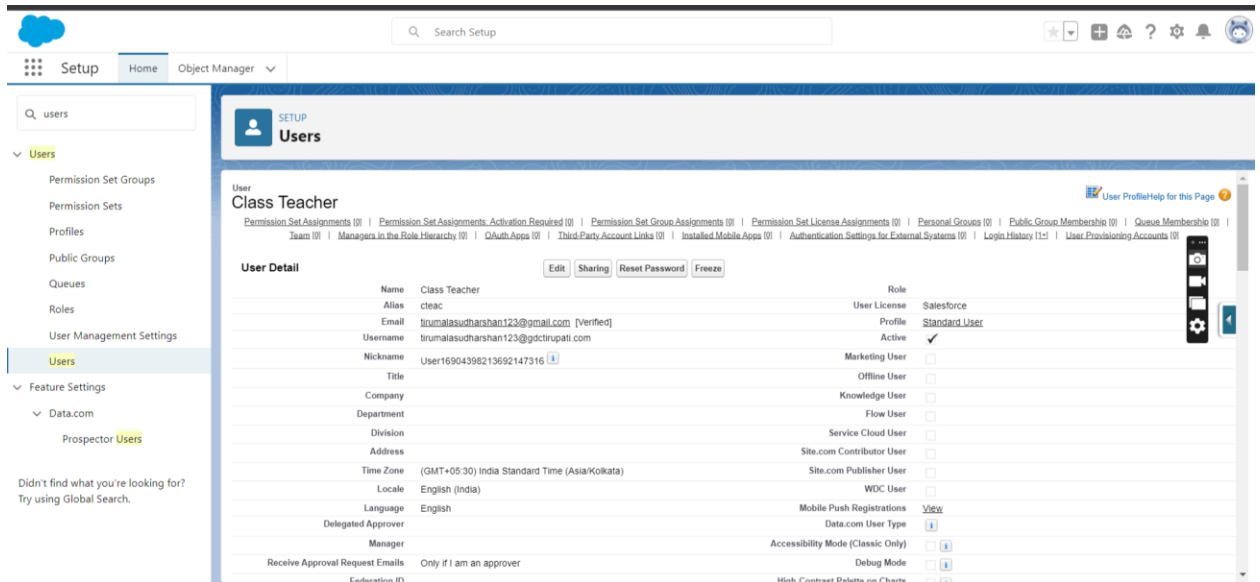
Set History Tracking

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

Users:

Creating A User:

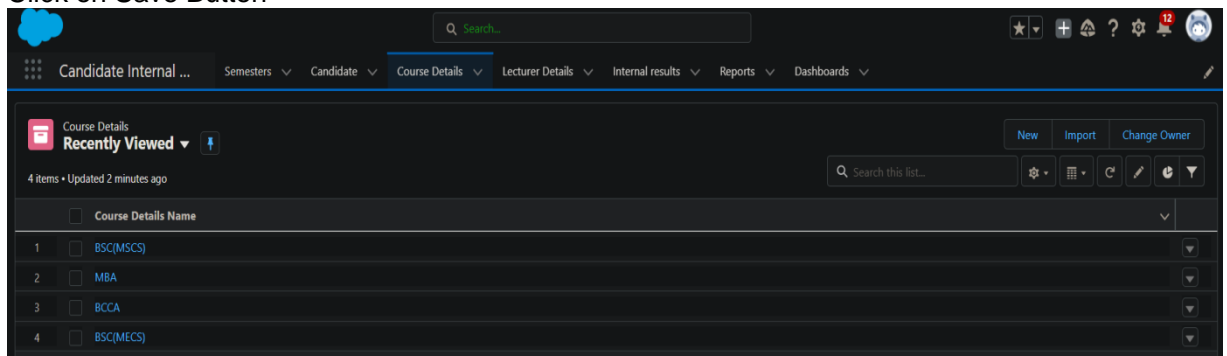
- From Setup, in the Quick Find box, enter Users, and then select Users.
- Click New User.
- Enter the user's name Class Teacher and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- Select a User License As Salesforce.
- 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.



User Adoption:

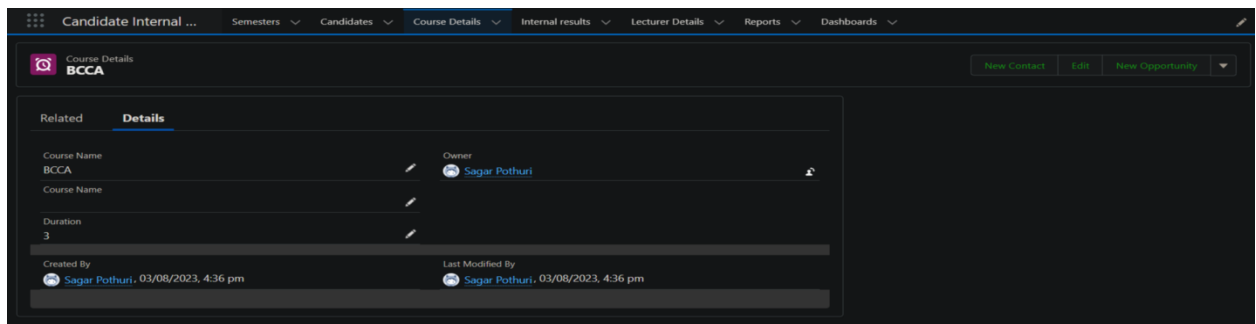
Create Record(Course Details):

- 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



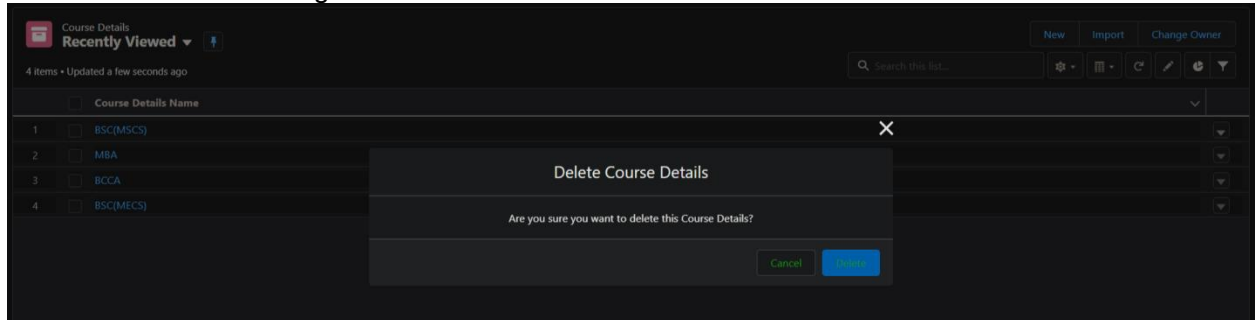
View Record (Course Details):

- 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):

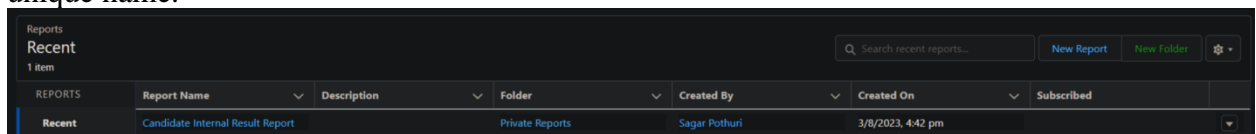
- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card & click on it.
- Click on Course Details Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.



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.

Report: Semesters with Course
Candidate Internal Result Report

Enable Field Editing 🔍 Add Chart ⌵ 🔄 Edit ⌵

Total Records
4

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.

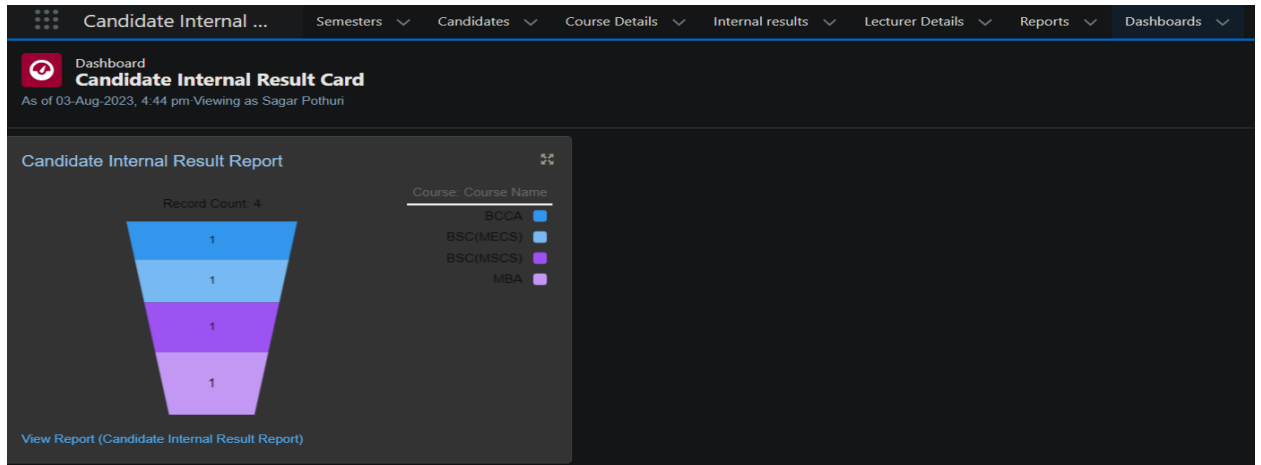
Dashboards
Recent
1 item

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 ----->