A Project Report on

SALESFORCE ADMINSTRATER GUIDED PROJECT

Implementing CRM for Result Tracking Of a Candidate with Internal Marks – (ADMIN)

by

Team Details

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SRI SIVANI COLLEGE OF ENGINEERING(SSCE)

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PROJECT 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 initialised by Candidate for all Internal Results. Have a multilevel approval process for the re-evaluation of the internal marks, 1st level by lecturer and 2nd level by dean. Now only dean can update the marks after re- evaluation Dean should be able to see list of Candidates grouped by Marks (Pass / Fail) in each Semester – should be a VisualForce page. Dean should be able to see average percentage of each Course for a Candidate. Dean should have the ability to view Pass percentage for each Semester.

CONTENTS

Implementing CRM for Result Tracking of A candidate With Internal Marks-(ADMIN)

CHAPTER 1 CREATING SALESFORCE ORG

INTRODUCTION

Salesforce operates on the concept of organizations, or orgs. As [defined by Salesforce] an org is:
"A deployment of Salesforce with a defined set of licensed users. An organization is the virtual space provided to an individual customer of Salesforce. Your organization includes all of your data and applications, and is separate from all other organizations."
When a customer purchases Salesforce, they are provided with an org which acts as the container for all their data.

Types of org

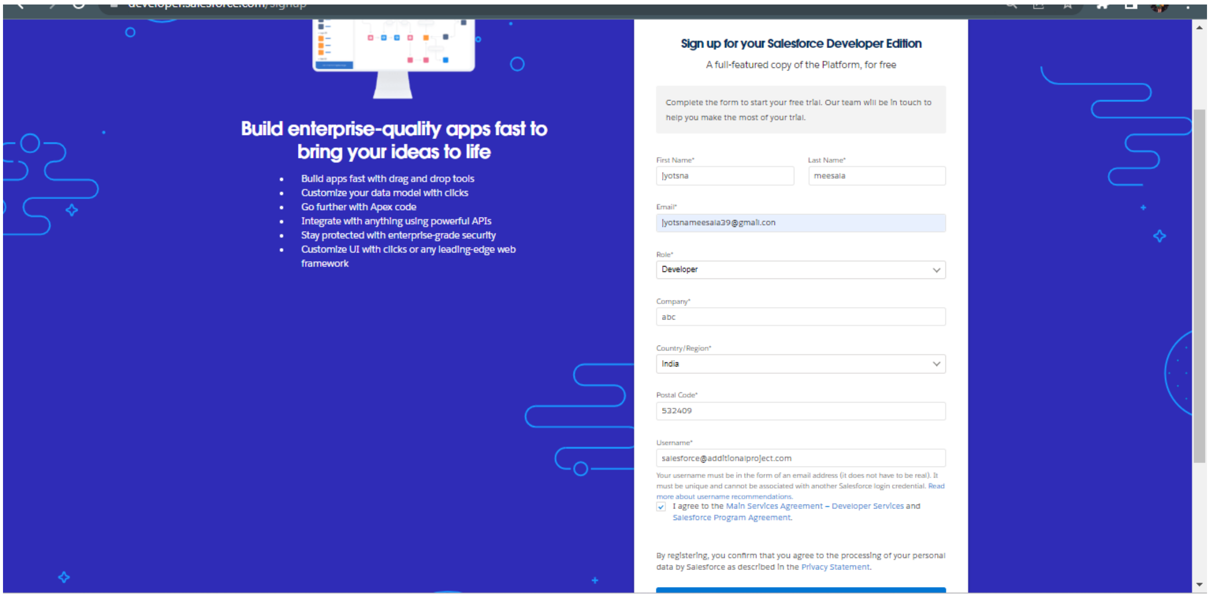
There are two broad categories of org:

- Production instances
- Development instances

1.1 Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/Signup
2. Click on sign up.
3. On the sign-up form, enter the following details:
    1. First name & Last name
    2. Email
    3. Role: Developer
    4. Company: College Name
    5. County: India
    6. Postal Code: pin code
    7. Username: should be a combination of your name and company This need not be an actual email id, you can give anything in the



1.2 Account Activation

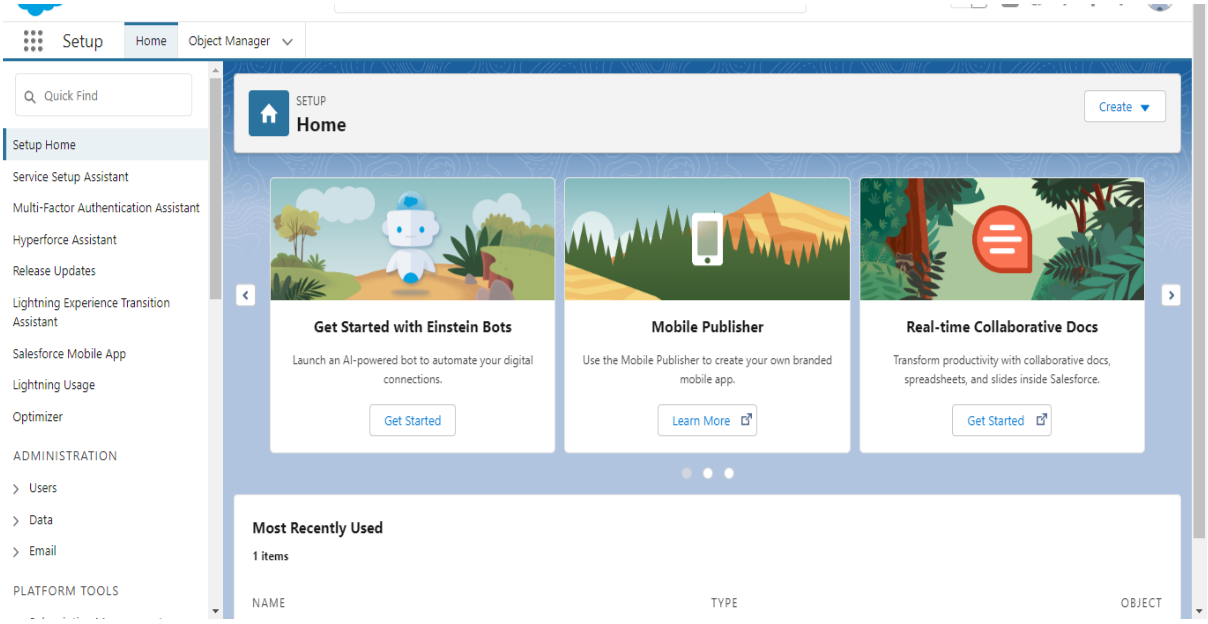
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins

Login to Your Salesforce 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

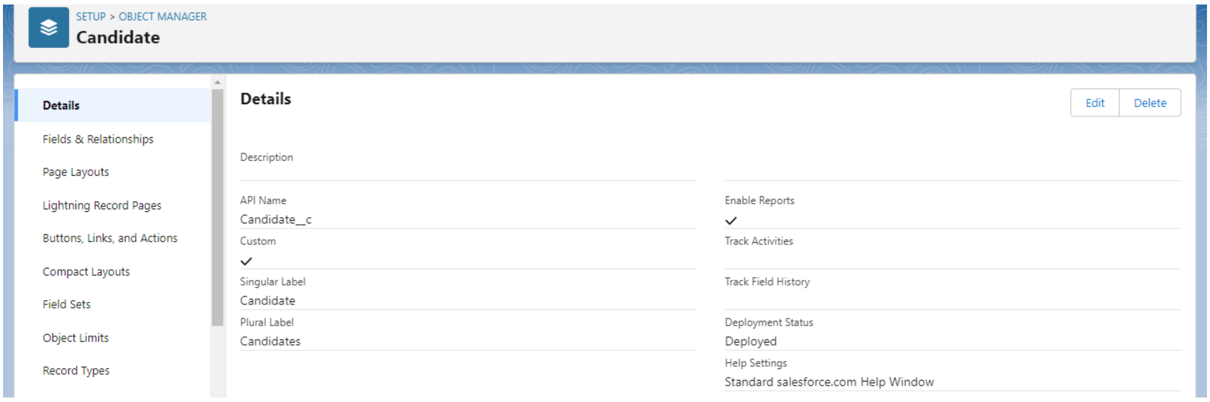


CHAPTER 2 OBJECT INTRODUCTION

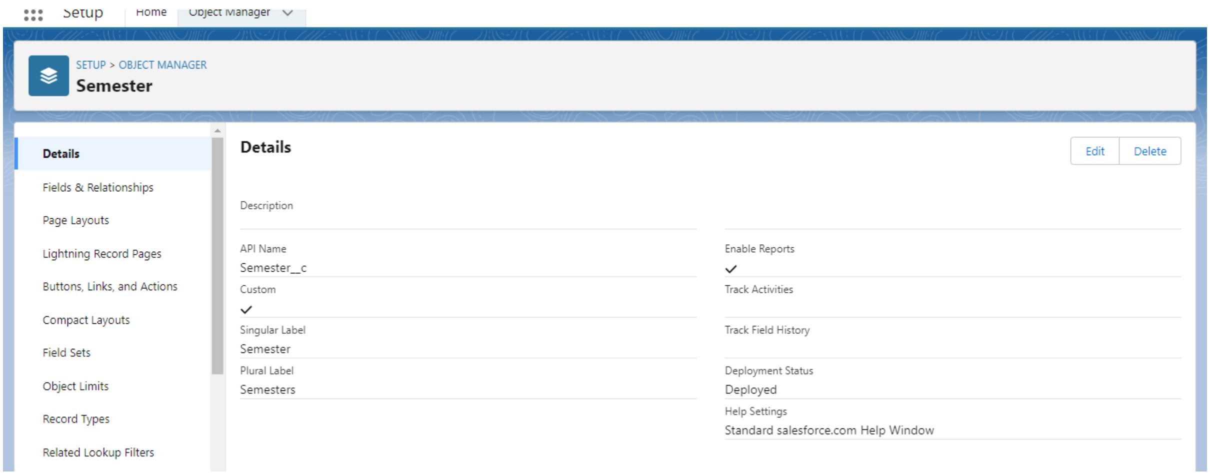
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. 2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

2.1 Creation Of Semester Object For Candidate Internal Result Card

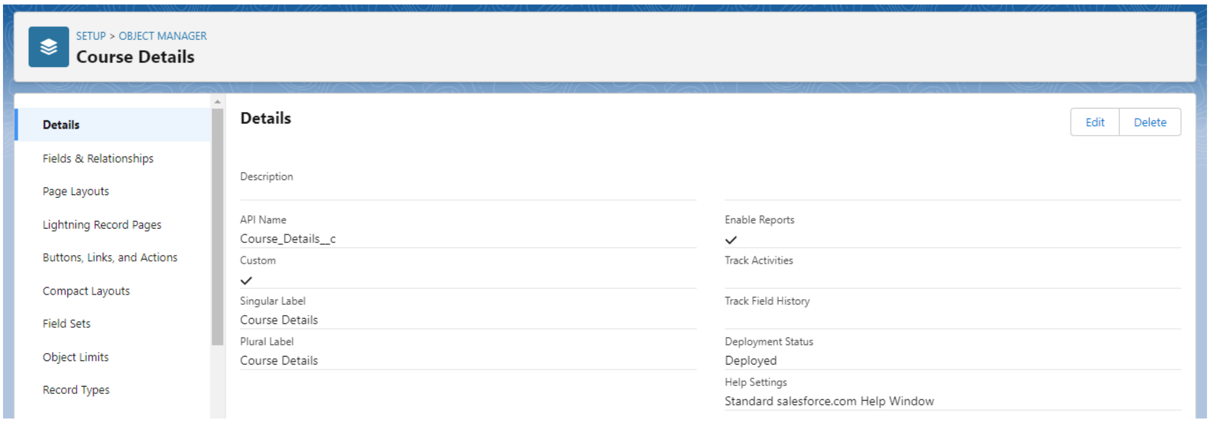
Candidate object:



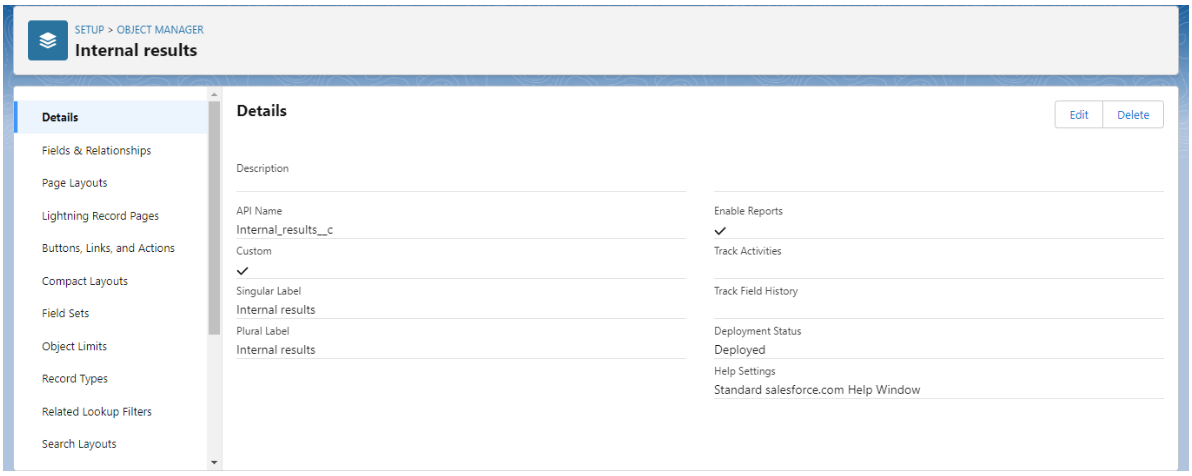
Semester object:



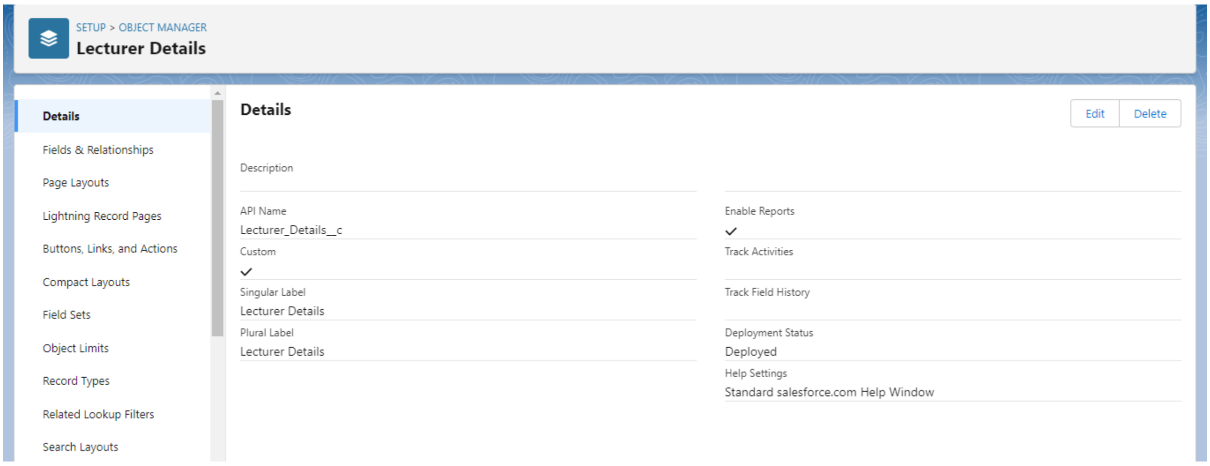
Course details object



Internal results object:



Lecturer Details



CHAPTER 3 WHAT IS A TAB?

INTRODUCTION

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web contenin the application. There are mainly 4 types of tabs:

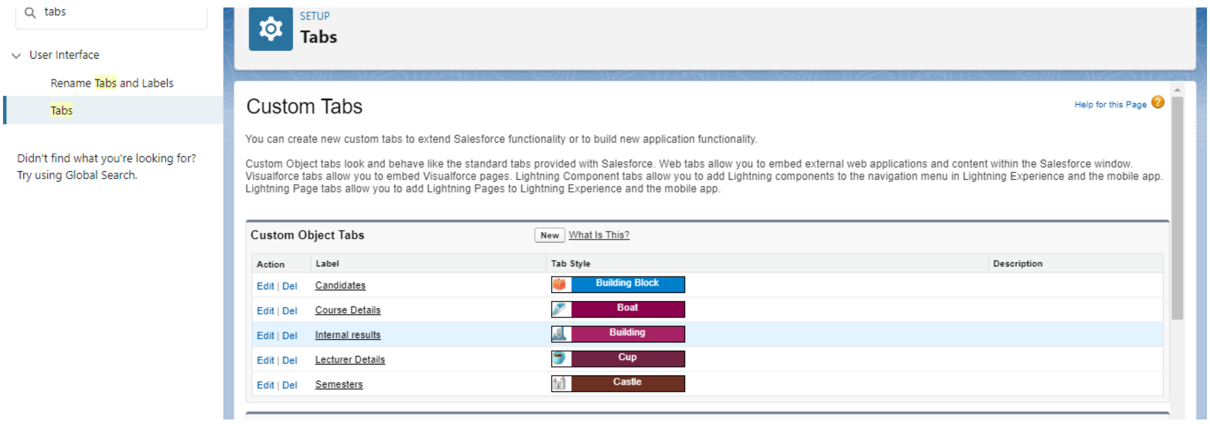
(A) Standard Object Tabs: Standard object tabs display data related to standard objects

(B) Custom Object Tabs: Custom object tabs displays data related to custom objects.

(C) Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.

(D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

3.1 Creation Of Semester Tab For Candidate Internal Result Card



CHAPTER 4 LIGHTNING APP

INTRODUCTION

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

There are two types of app – 1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce chatter, App Launcher, etc are present in it. Note: The description, Logo, and Label of standard app cannot be altered.

2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together. Note: Logos for Custom Apps can be changed.

4.1 Create The Candidate Internal Result Card App

1. From Setup, enter App Manager in the Quick Find and select App Manager.

2. Click New Lightning App.

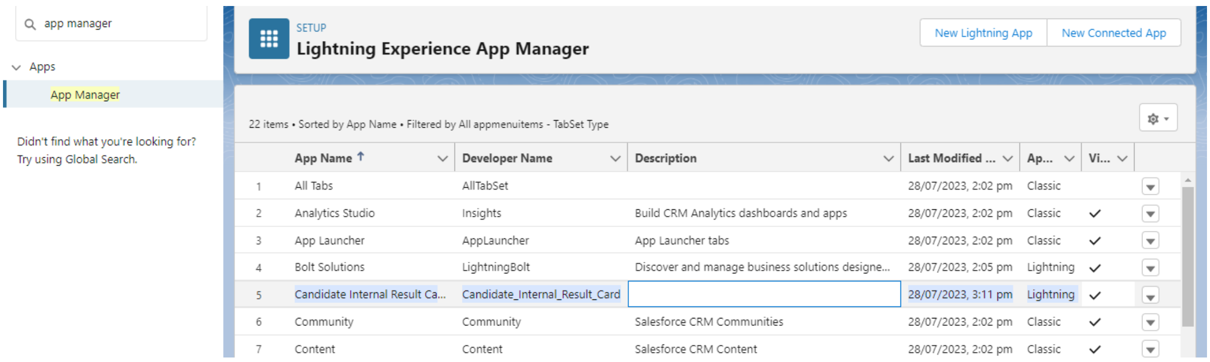
3. Enter Candidate Internal Result Card as the App Name, then click next

4. Under App Options, leave the default selections and click next.

5. Under Utility Items, leave as is and click Next.

6. From Available Items, select Semester, Candidate, Course Details, Lecturer Details, Internal results, Reports, and Dashboards and move them to Selected Items.

7. Click Next. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



CHAPTER 5 FIELDS AND RELATIONSHIP

INTRODUCTION

Fields - Fields store data values that are required for a particular object in a record. An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

5.1 Creation Of Text Field On "Lecturer Details" & Look Up Field For The "Candidate" Object

1.Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Lecturer Details

4. Select Fields & Relationships from the left navigation

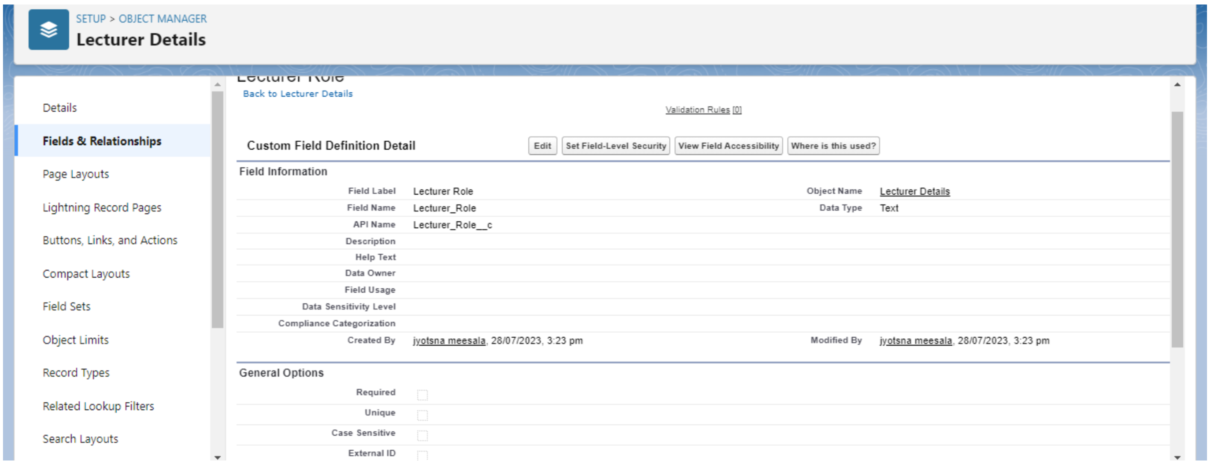
5. Click New

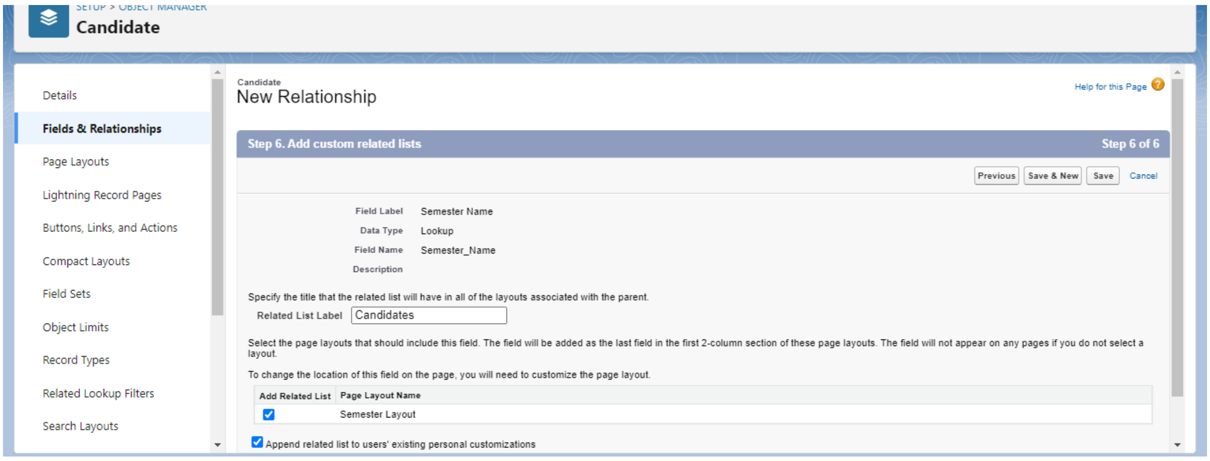
6. Select the Text as the Data Type, click next.

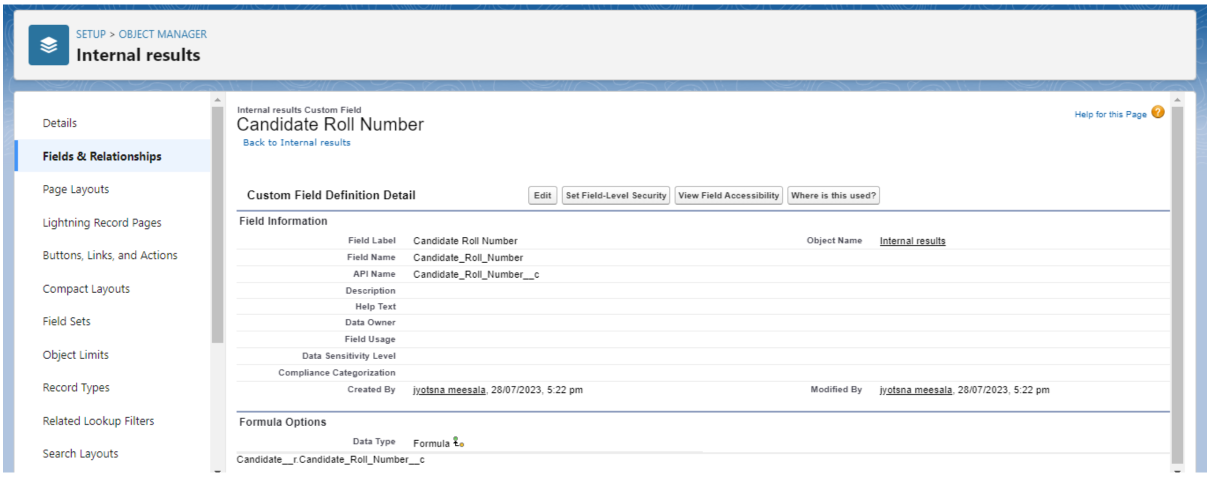
7. For Field Label, enter Lecturer Role

8. Enter Length 40

9. Click Next, Next, then Save & New.







Now Let's create a Lookup field on candidate object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select candidate.

4. Select Fields & Relationships from the left navigation

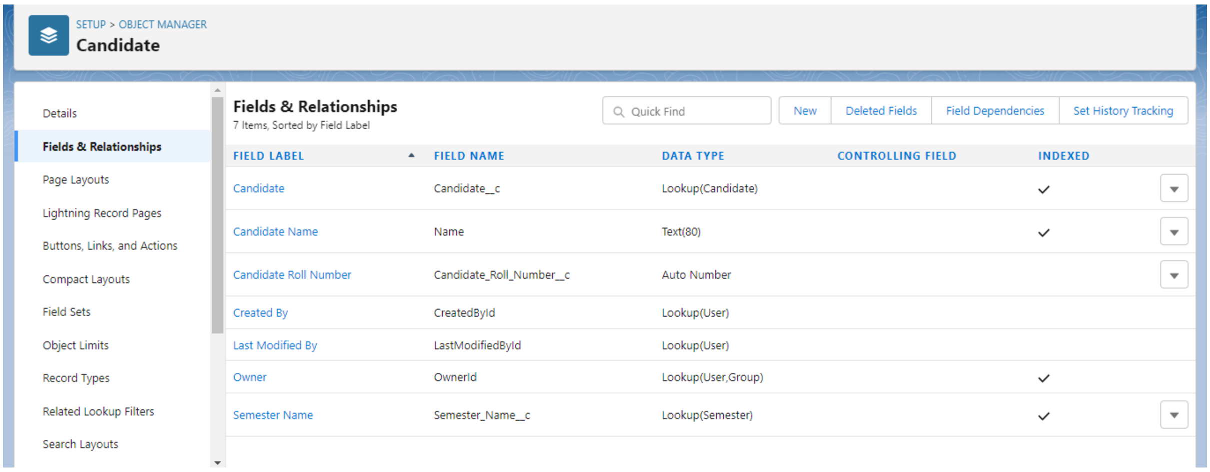
5. Click New

6. Select the lookup as the Data Type, then click Next.

7. In related select Semester

8. For Field Label Semester Name, enter.

9. Click Next, Next, then Save & New.



5.2 Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object Let's create a Number field on Course Details object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Course Detail.

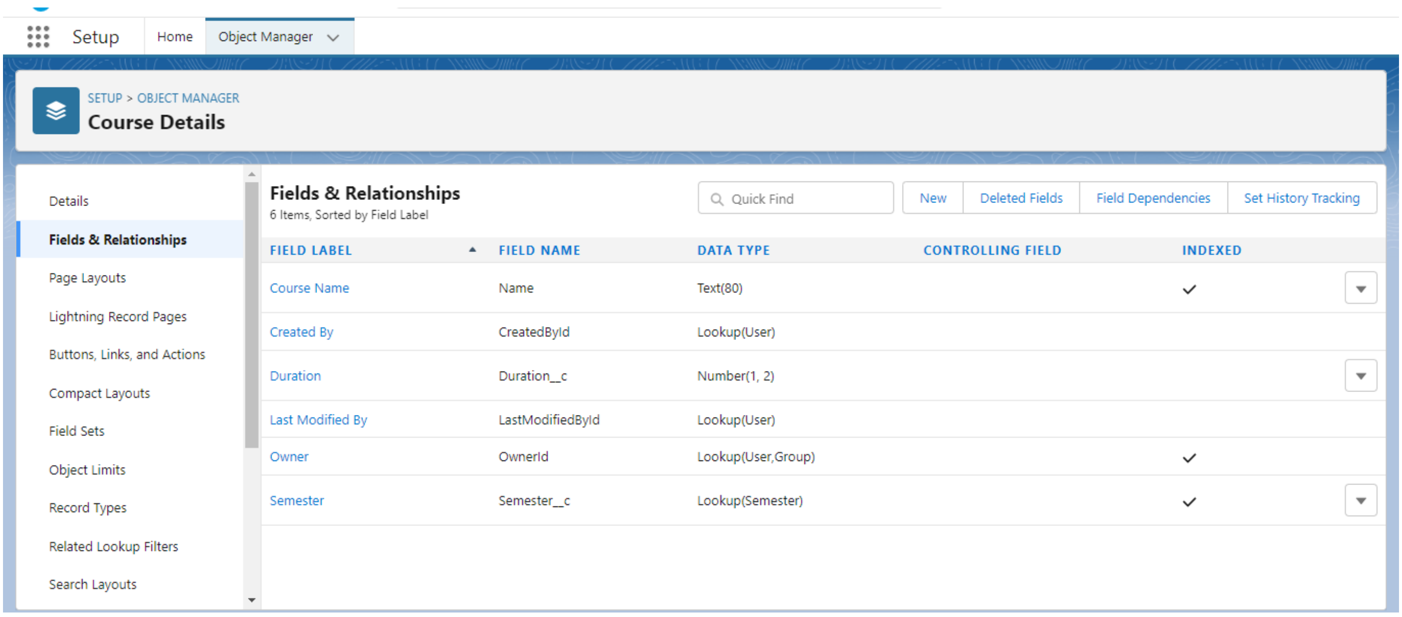
4. Select Fields & Relationships from the left navigation

5. Click New & select number field, click Next

6. For Field Label Duration, enter.

7. Give Help Text- Enter Course duration value in Years

8. Click Next, Next, then Save & New.



Now Let's create a Formula field on Internal Results object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Internal results.

4. Select Fields & Relationships from the left navigation.

5. Click New

6. Select the Formula as the Data Type, then click Next.

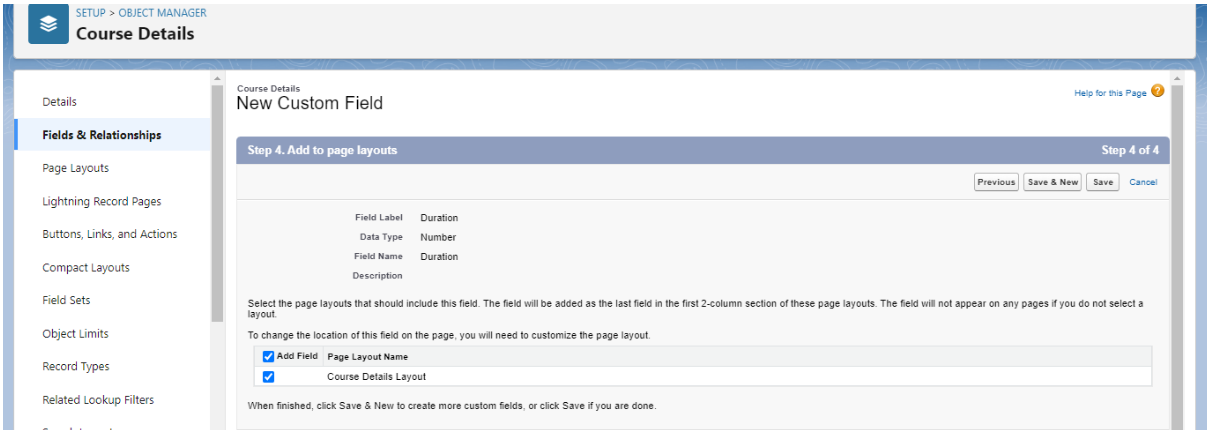
7. Give field label Candidate Roll Number

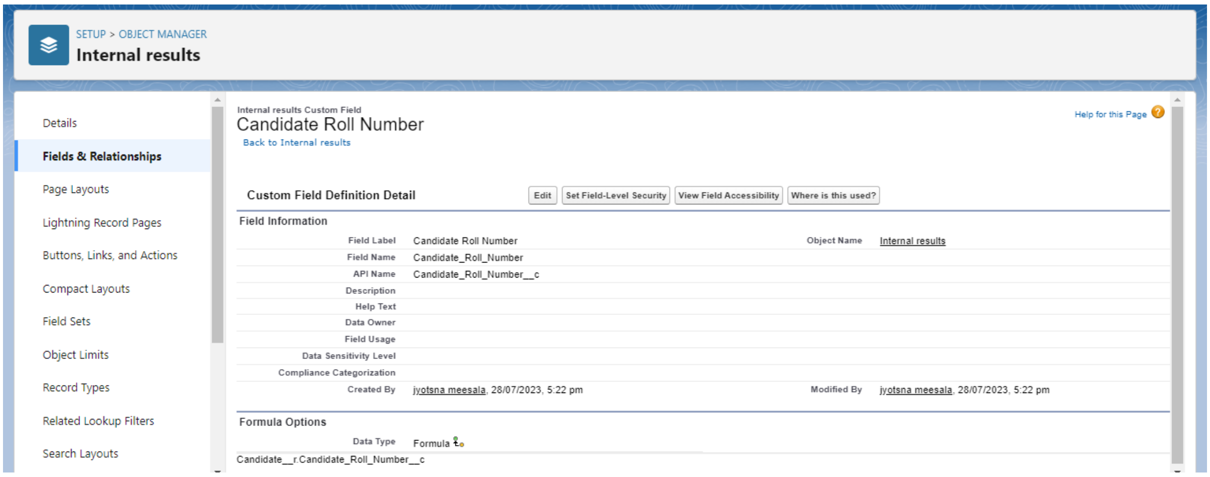
8. Select formula return type text, Click Next

9. Click Insert Field

10.Create and insert formula Candidate r.Candidate_Roll_Number c, and then click Insert.

11.Click Next, Next, then Save


SETUP > OBJECT MANAGER
Course Details
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Course Details
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Duration
Data Type Number
Field Name Duration
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Course Details Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.


SETUP > OBJECT MANAGER
Internal results
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Internal results Custom Field
Candidate Roll Number
Back to Internal results
Help for this Page
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Candidate Roll Number
Object Name Internal results
Field Name Candidate_Roll_Number
API Name Candidate_Roll_Number__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By jyotsna meesala, 28/07/2023, 5:22 pm
Modified By jyotsna meesala, 28/07/2023, 5:22 pm
Formula Options
Data Type Formula
Candidate__r.Candidate_Roll_Number__c

CHAPTER 6 USER

INTRODUCTION

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account

6.1 Creating A User

1. From Setup, in the Quick Find box, enter Users.

2. Select Users.

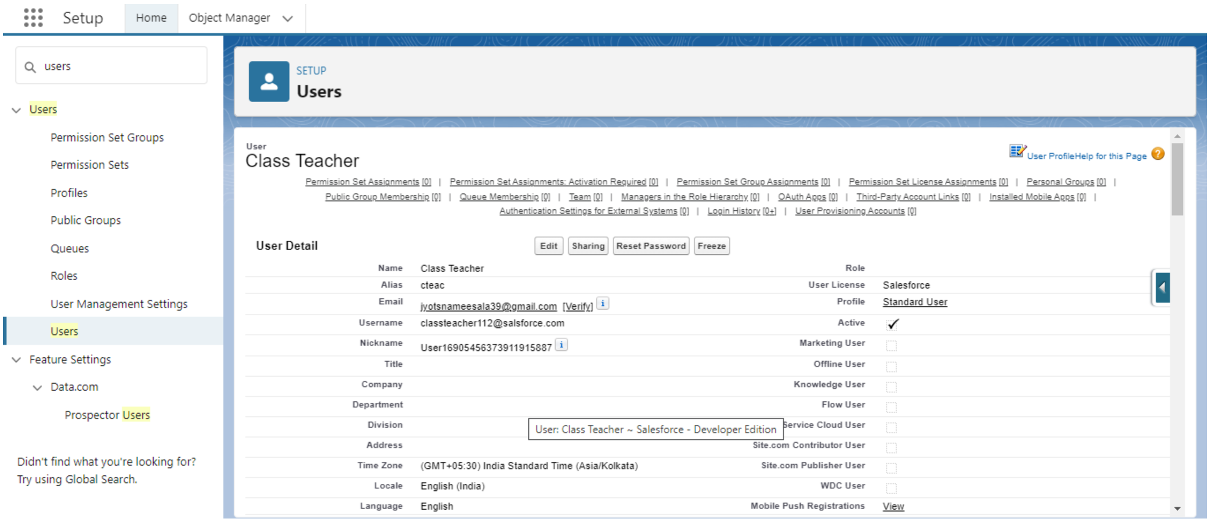
3. Click New User.

4. Enter the First Name, Class, Last Name, Teacher and (Your) email address anda unique username in the form of an email address. By default, the username is the same as the email address.

5. Select a User License as salesforce. NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don’t find salesforce license then deactivate a user who has salesforce license Or change the license type from Salesforce to any other.

6. Select a profile as Standard 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.



CHAPTER 7 USER ADOPTION

INTRODUCTION

Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

7.1 Create Record (Course Details) Create Records on Course Details Objects

1. Click on App Launcher on left side of screen.

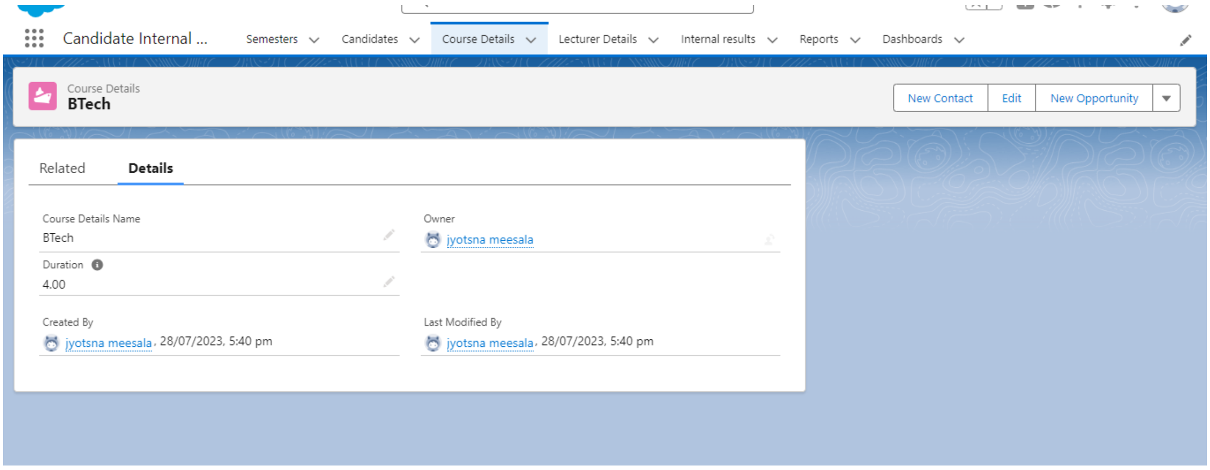
2. Search Candidate Internal Result Card App & click on it.

3. Click on Course Details tab.

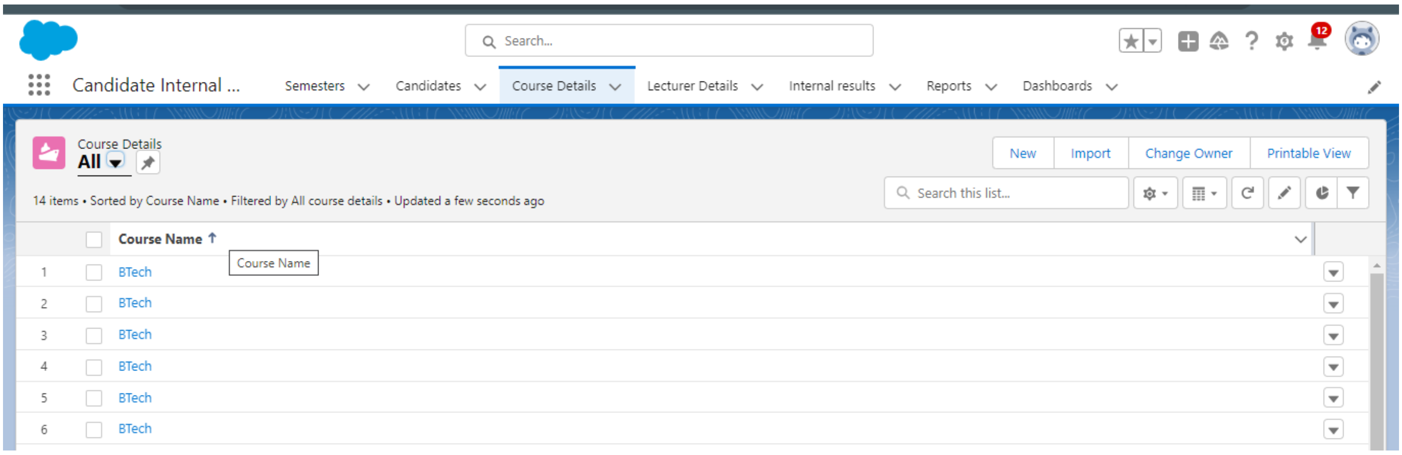
4. Click new button

5. Fill all Course Details record details.

6. Click on Save Button.



7.2 View Record



7.3 Delete Record Deleting Records of Course Details Object

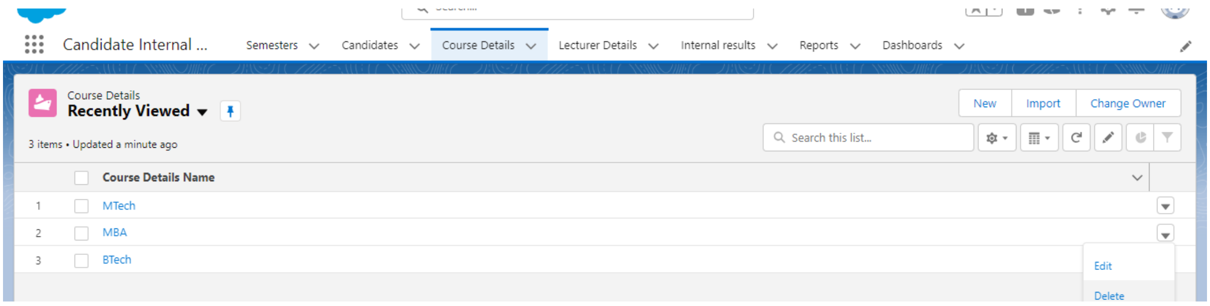
1. Click on App Launcher on left side of screen.

2. Search Candidate Internal Result Card & click on it.

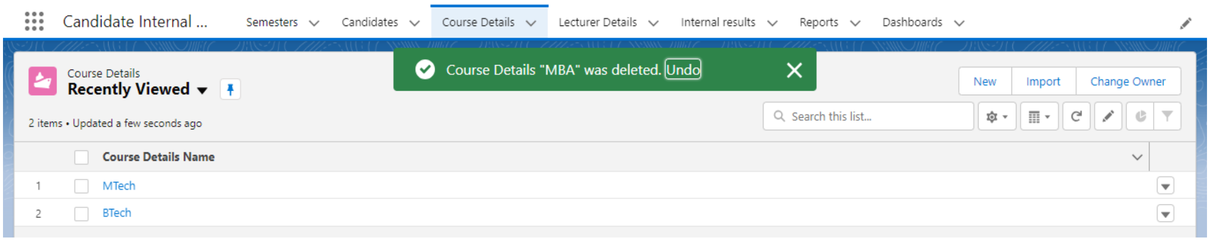
3. Click on Course details Tab.

4. Click on Arrow at right hand side on that Particular record.

5. Click delete and delete again.



Candidate Internal ...
Semesters
Candidates
Course Details
Lecturer Details
Internal results
Reports
Dashboards
Course Details
Recently Viewed
New
Import
Change Owner
3 items • Updated a minute ago
Search this list...
Course Details Name
1 MTech
2 MBA
3 BTech
Edit
Delete



Candidate Internal ...
Semesters
Candidates
Course Details
Lecturer Details
Internal results
Reports
Dashboards
Course Details
Recently Viewed
Course Details "MBA" was deleted. Undo
New
Import
Change Owner
2 items • Updated a few seconds ago
Search this list...
Course Details Name
1 MTech
2 BTech

CHAPTER 8 WHAT ARE REPORTS?

INTRODUCTION

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

Tabular Reports: This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

Summary Reports: It is the most commonly used type of report. It allows grouping of rows of data, view sub total,and create charts.

Matrix Report: It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

Joined Reports: These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub-report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types: Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly. A report type cannot include more than 4 objects. Once a report is created its report type cannot be changed.

There are 2 types of report types:

Standard Report Types: Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked. Standard report types cannot be customized and automatically include standard and custom fields for each 29 object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

Custom Report Types: Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with "Manage Custom Report Types" permission. Custom report types are created when standard report types cannot specify which records will be available on reports. In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

Viewer: With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

Editor: With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

Manager: With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

8.1 Create Report

1. Click App Launcher

2. Select Candidate Internal Result Card App

3. Click reports tab

4. Click New Report.

5. Click the report type as Semesters with Course Click Start report.

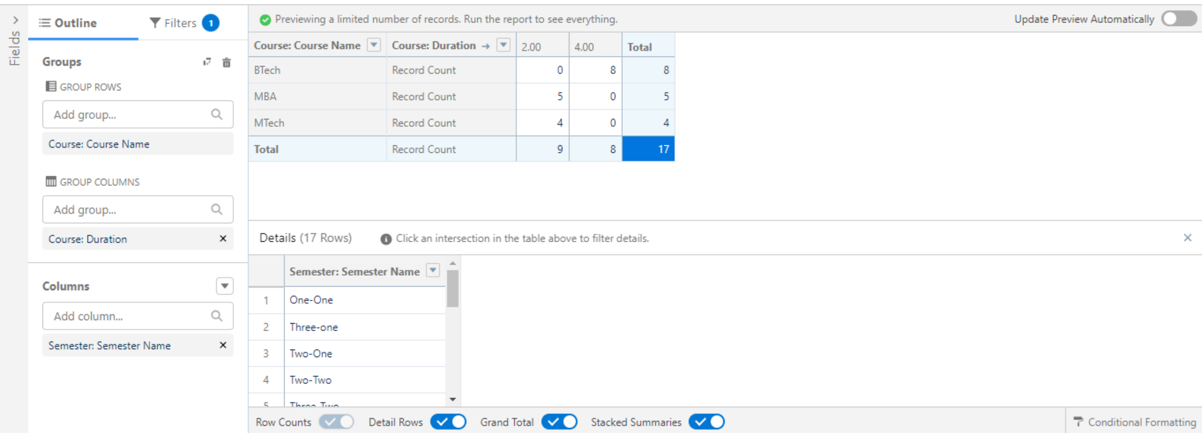
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a Matrix Report).

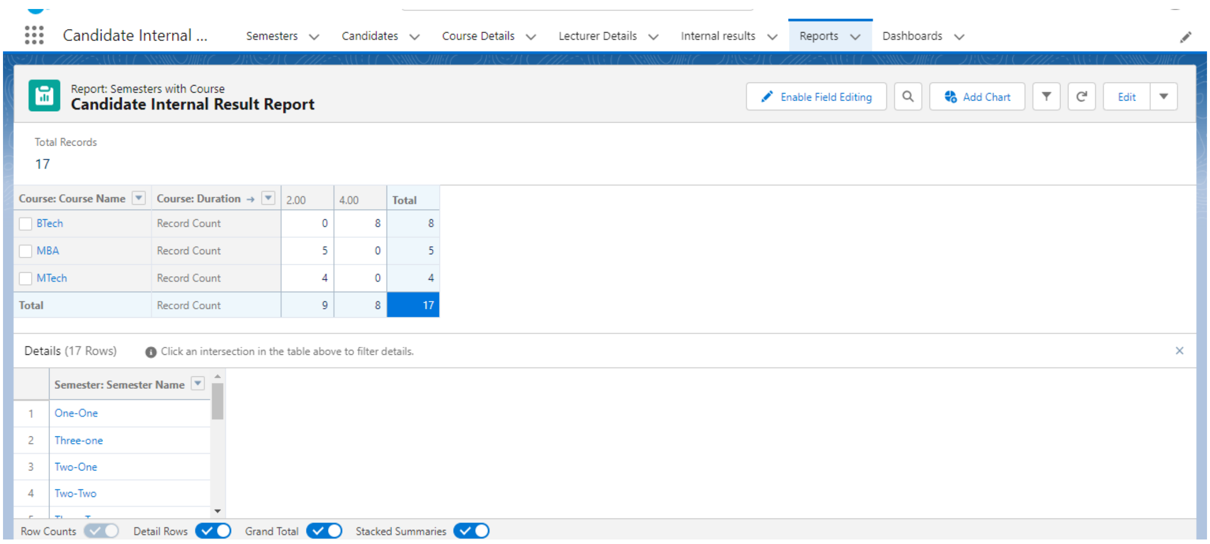
7. Click refresh

8. Click save and run

9. Give report name – Candidate Internal Result Report

10.Click Save NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).





1. On the report builder page, locate the "Fields" pane on the left-hand side.

2. Find the field for which you want to create a bucket field and drag it to the report preview section.

3. Click on the field in the report preview to open the field properties.

4. In the field properties, locate the "Summarize" option and click the drop-down arrow.

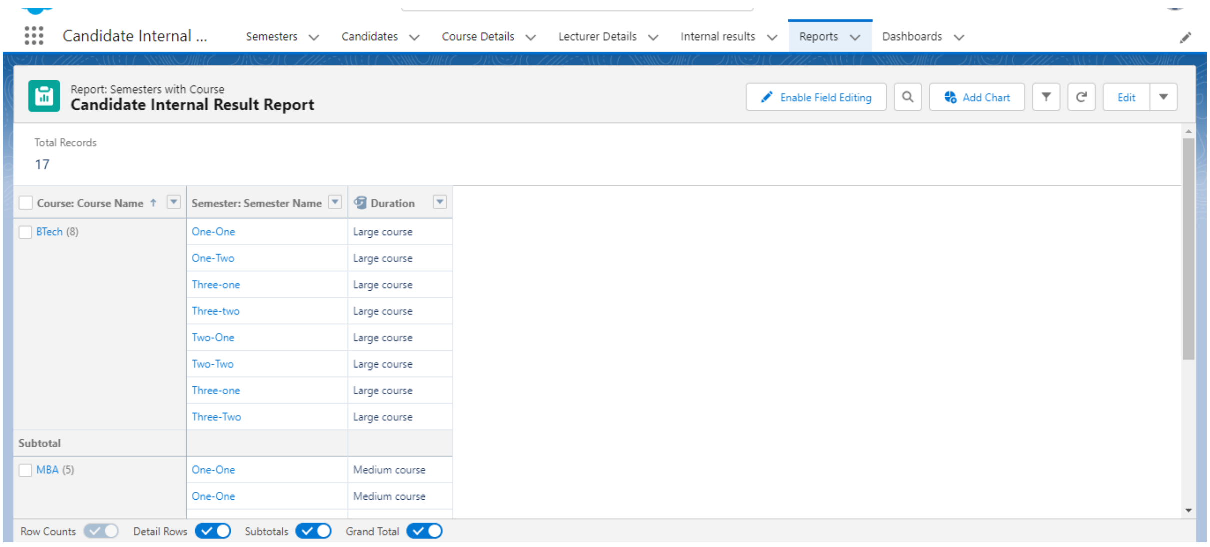
5. Select "Bucket Field" from the available options.

6. In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.

7. Click "OK" or "Apply" to save the bucket field settings.

8. Customize the report layout and add any additional fields or filters as needed.

9. Once you are satisfied with the report setup, click "Save" to save the report.



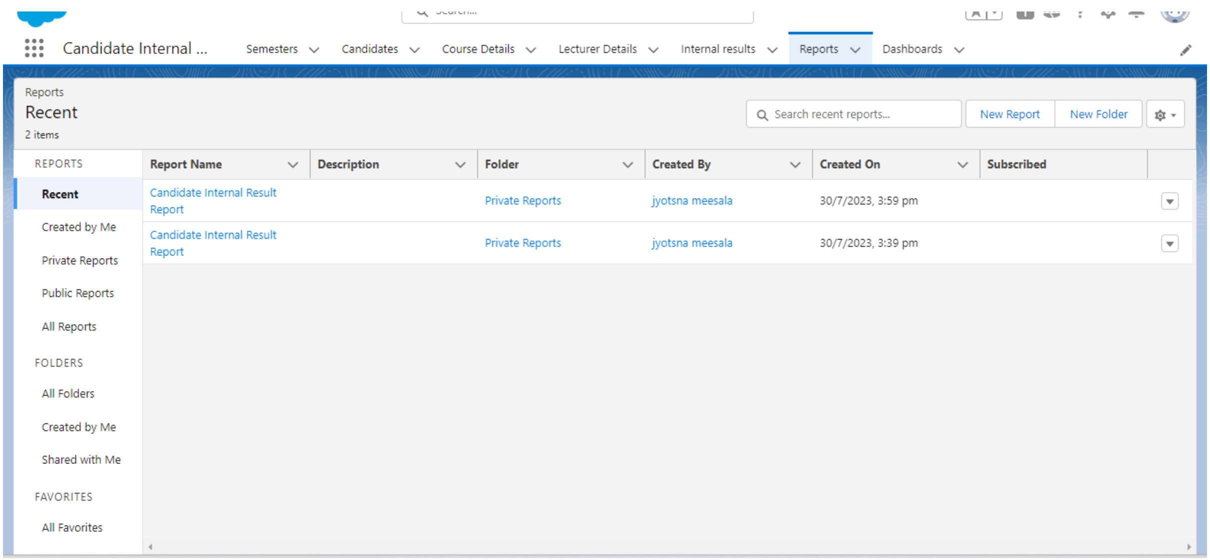
8.2 View Report

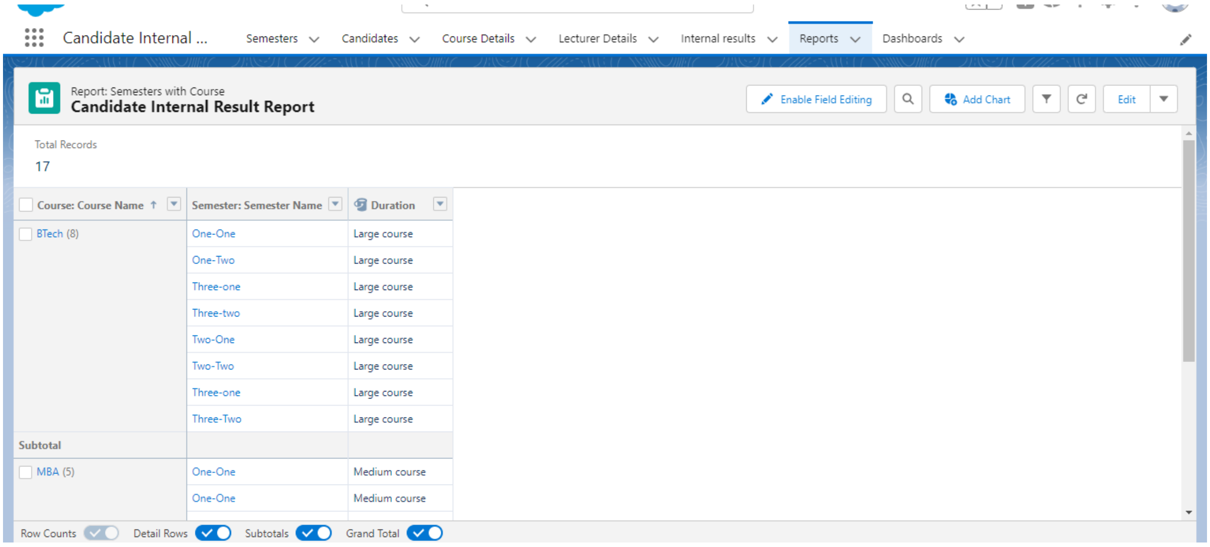
1. Click on App Launcher on left side of screen.

2. Search Candidate Internal Result Card App & click on it.

3. Click on Reports Tab.

4. Click on Candidate Internal Result Report and see records.




Candidate Internal ...
Semesters
Candidates
Course Details
Lecturer Details
Internal results
Reports
Dashboards
Report: Semesters with Course
Candidate Internal Result Report
Enable Field Editing
Add Chart
Edit
Total Records
17
Course: Course Name
Semester: Semester Name
Duration
BTech (8)
One-One
Large course
One-Two
Large course
Three-one
Large course
Three-two
Large course
Two-One
Large course
Two-Two
Large course
Three-one
Large course
Three-Two
Large course
Subtotal
MBA (5)
One-One
Medium course
One-One
Medium course
Row Counts
Detail Rows
Subtotals
Grand Total

CHAPTER 9 DASHBOARDS

INTRODUCTION

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

9.1 Create Dashboard

1. Click on Dashboards tab from the Candidate Internal Result Card application.

2. Click on new dashboard.

3. Give name- Candidate Internal Result Card

4. Click create

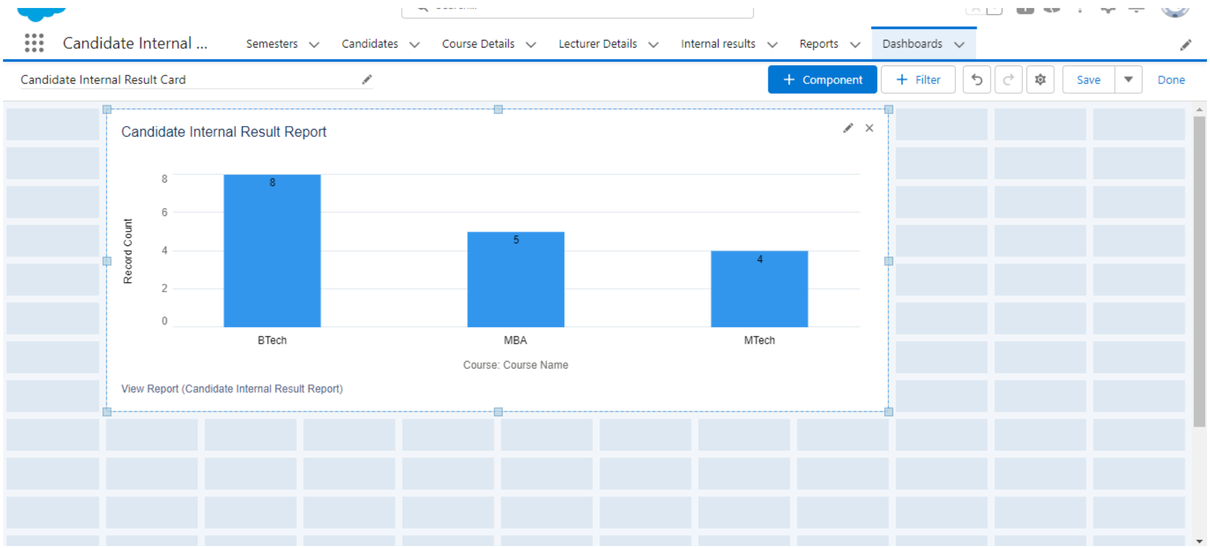
5. Give your dashboard a name and click on +component

6. Select the Candidate Internal Result Report which you created.

7. For the data visualization select any of the chart, table etc. as per your choice/requirement.

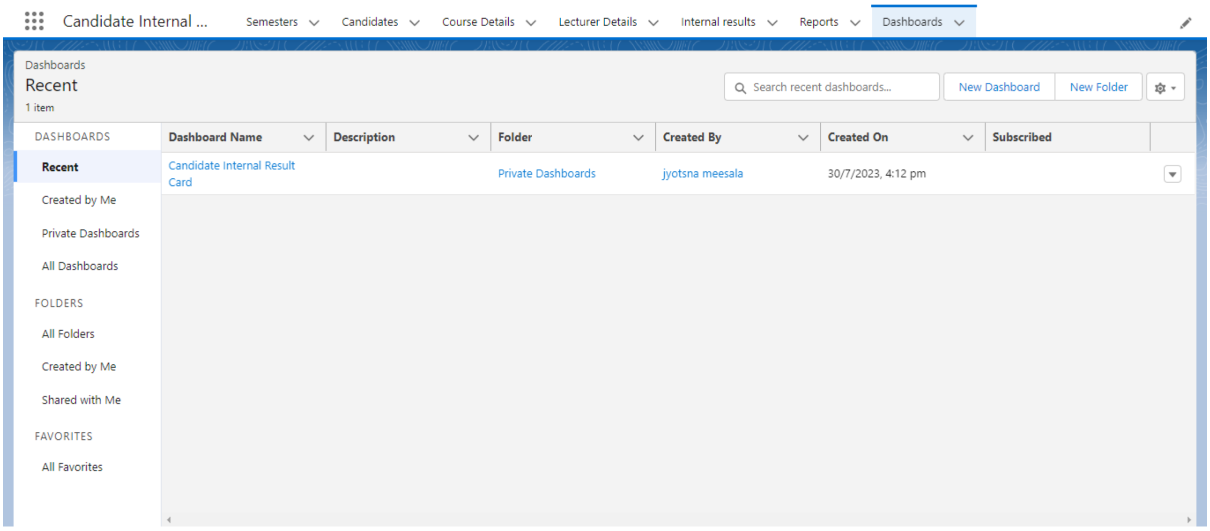
8. Click add.

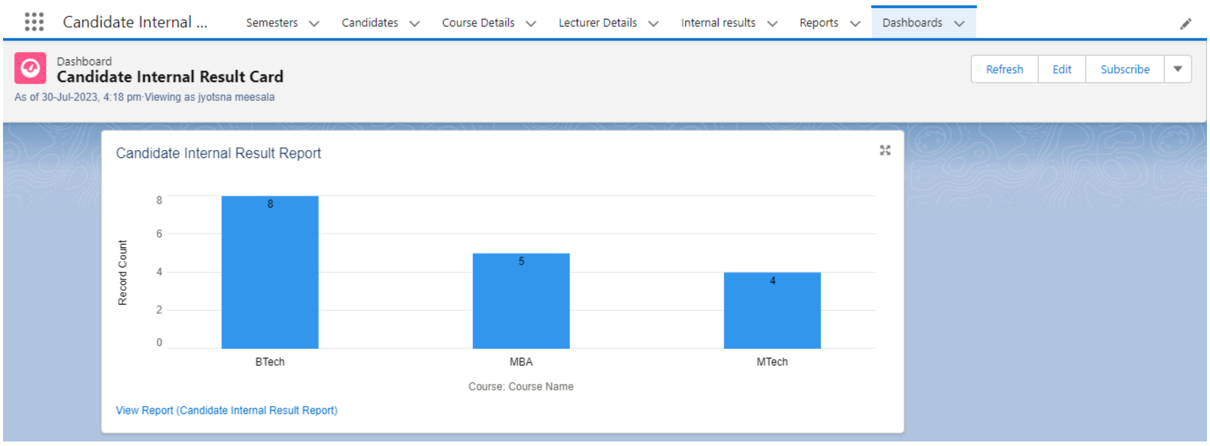
9. Click save.



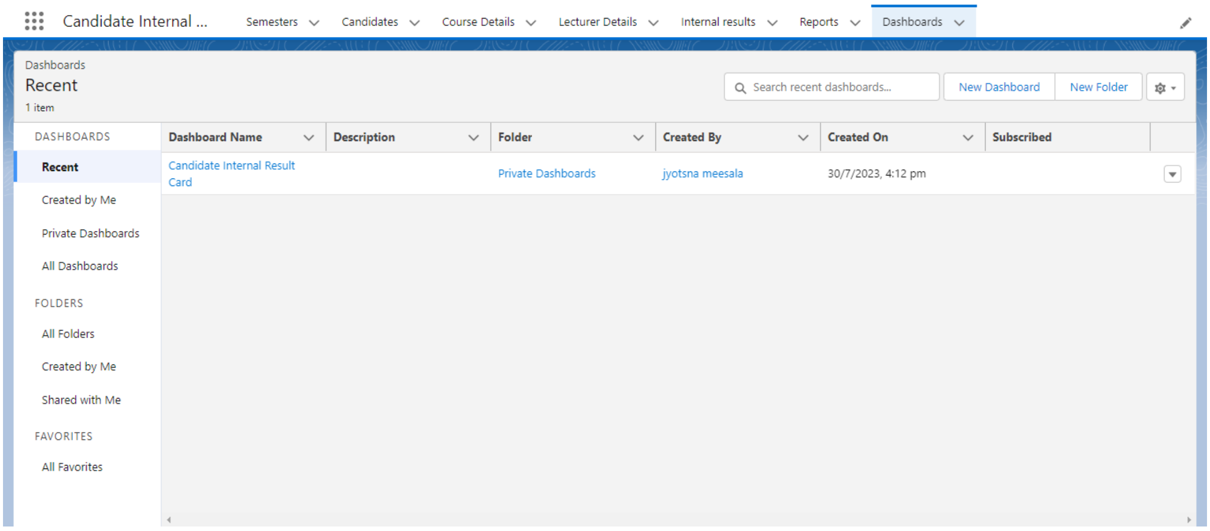
9.2 View Dashboard

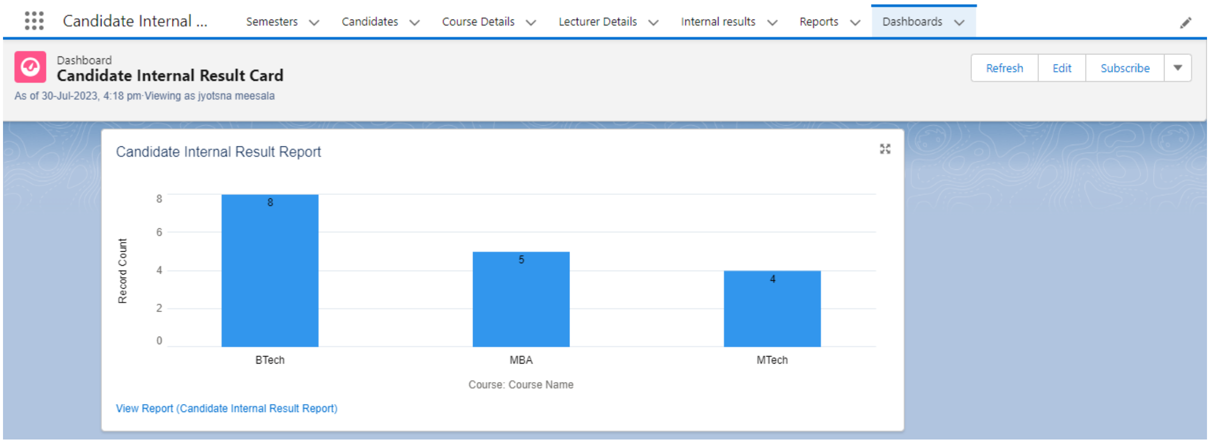
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records





CHAPTER 10 EXPERIMENTAL RESULTS





11.Advantages & Disadvantages:

Advantages:

- It is used to tracking the internal results of the students.
- It tracks of students data.
- Provides streamline operations.

Disadvantages:

- If manual error occurs during the feeding of data it is difficult to be altered.
- Having lots of security concerns.
- It can be accessed by third party

12.Conlusion:

- It is easiest method to track the students internal result and also it can be tracked anywhere through online mode.

Future Scope:

- Students date of birth can be included for verifying students.
- External marks can included so result analysis can be done easily.

Trailhead Profile Public URL:

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