



IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

Project Based Experiential Learning Program

Implementing CRM for Result tracking of a candidate with internal marks.

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.Now only dean can update the marks after re- evaluation

Milestone 1:Creation Salesforce Org:

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

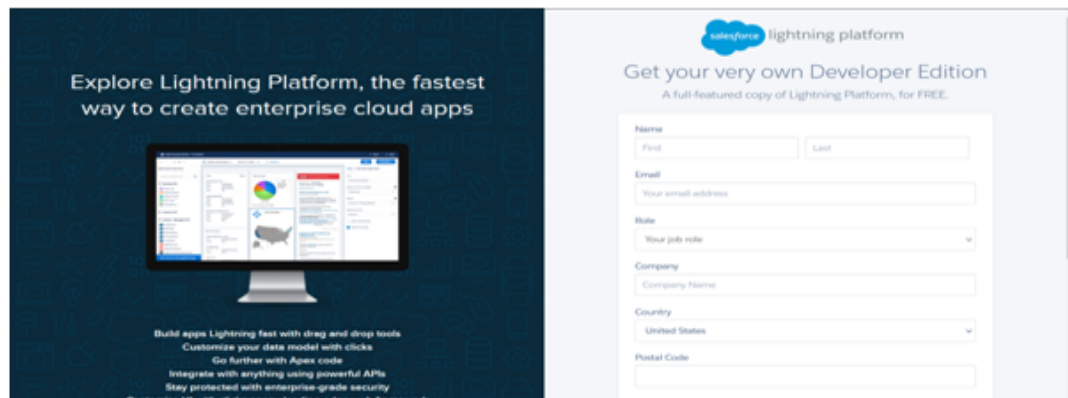
Activity 1:

Creating Developer Account

Creating a developer org in salesforce.

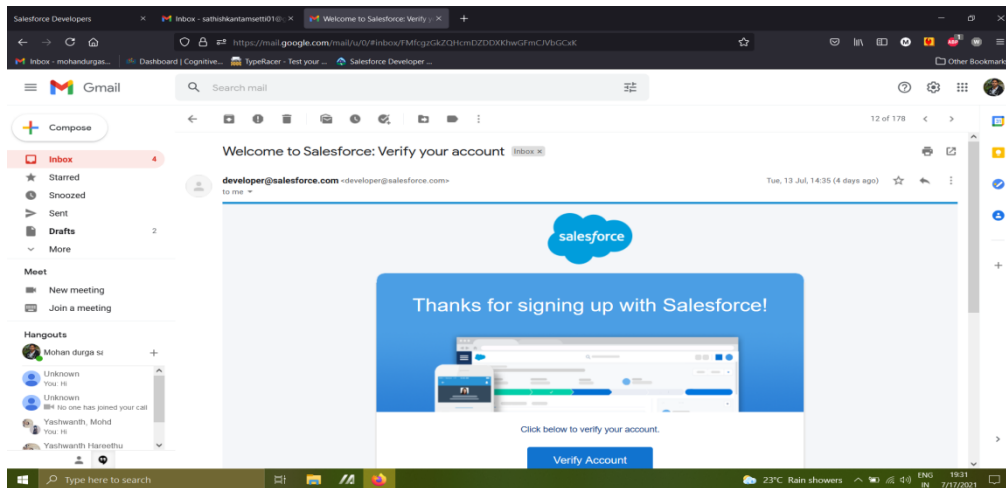
1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer
 - c. Company : College Name
 - d. Country : India
 - e. Postal Code : pin code
 - f. Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign up after filling these.



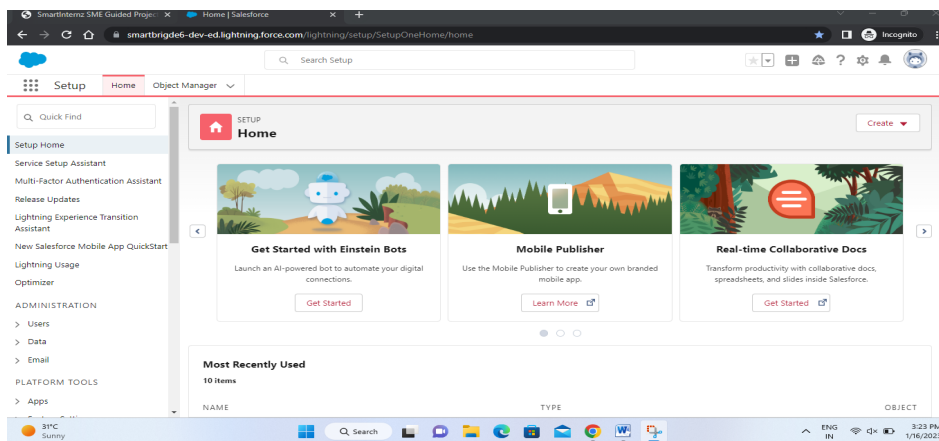
Account Activation

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, as



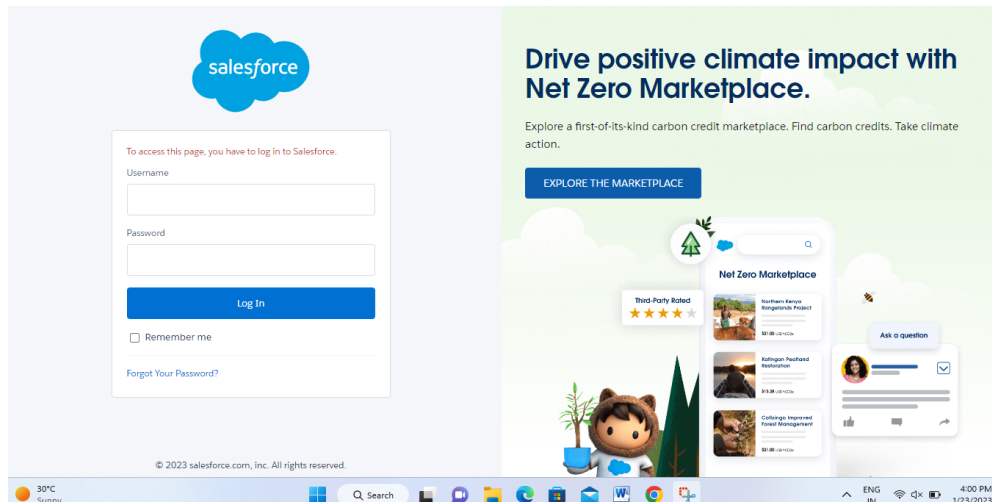
Login To Your Salesforce Account

1. Go to [salesforce.com](https://login.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.



Salesforce Login

<https://login.salesforce.com>



Milestone-2:Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Custom objects:

- 1.Semester
- 2.Candidate
- 3.Course Details
- 4.Lecturer Details
- 5.Internal results

Activity-1:

To Create an object:

Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e Semester,Candidate,Course Details,Lecturer Details,Internal Results.

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

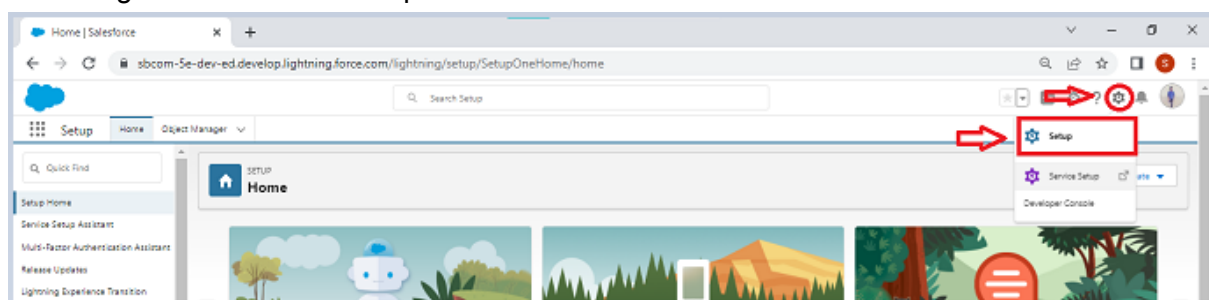
On the Custom Object Definition page, create the object as follows:

- Label: Semester
- Plural Label: Semesters

- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

To Navigate to Setup page:

Click on gear icon → click setup.



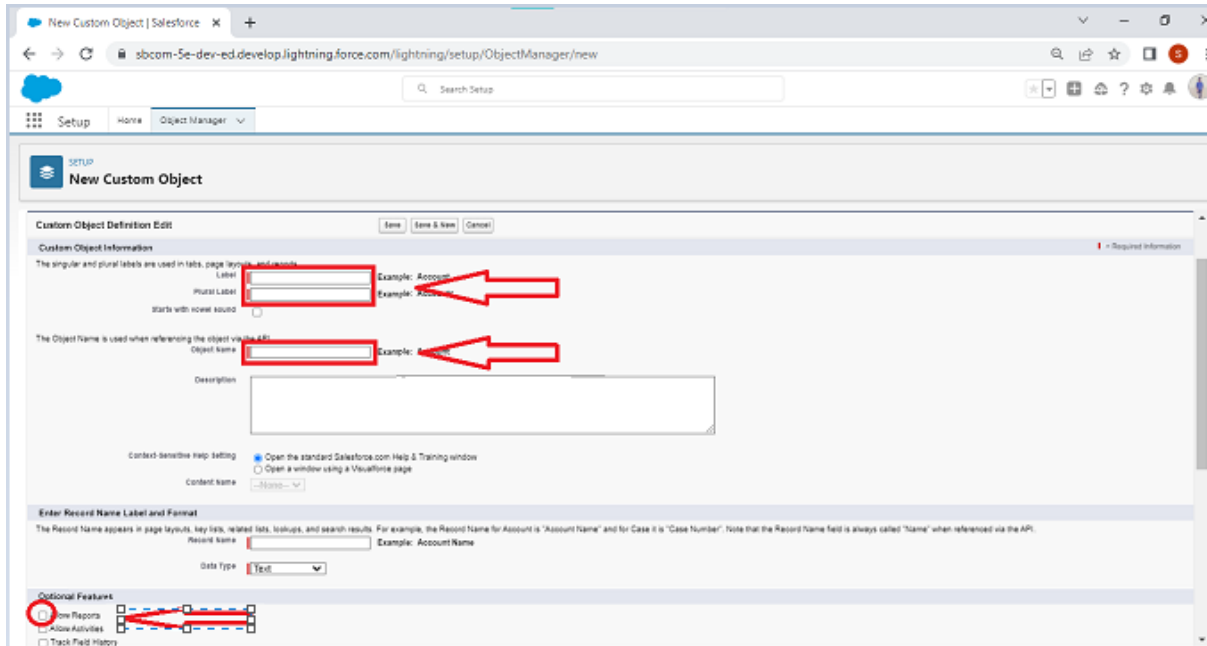
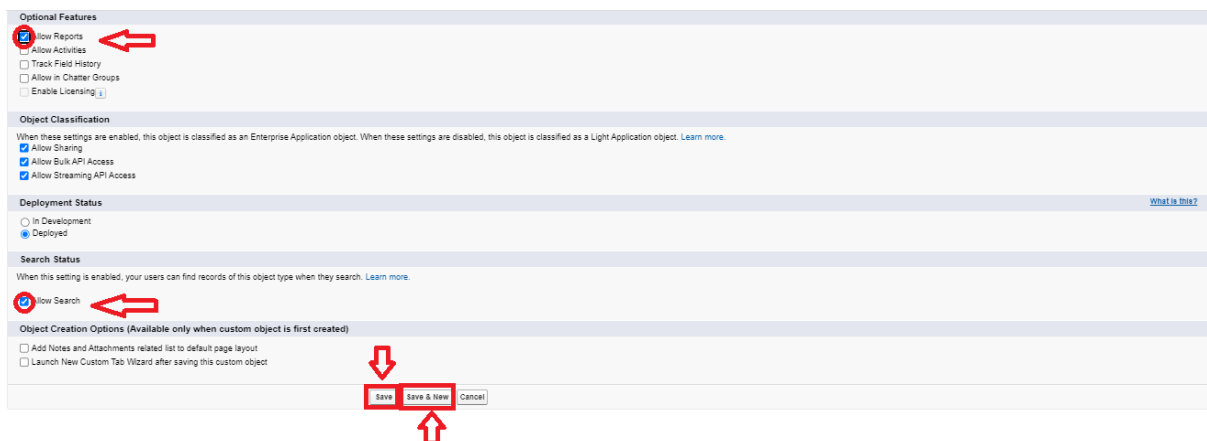
To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



On Custom object defining page:

Enter the label name, plural label name, click on Allow reports, Allow search → Save.

Activity-2: Follow Similar steps to create Candidate, Course Details, Lecturer Details, Internal results Objects.

Milestone -2: Fields and Relationship

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.

Activity-1:

Creation of fields:

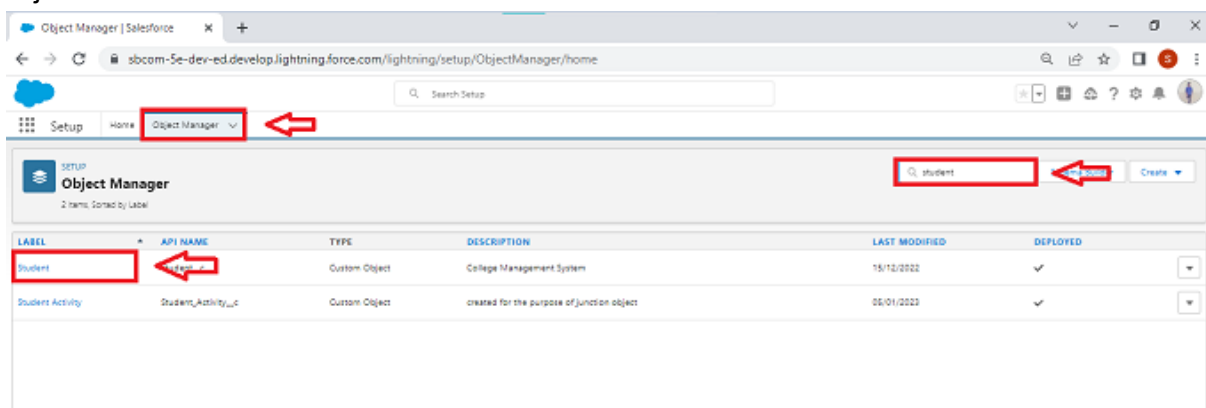
- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Semester.
- Select Fields & Relationships from the left navigation, and click New

Now ready to make a custom field. Let's do this!

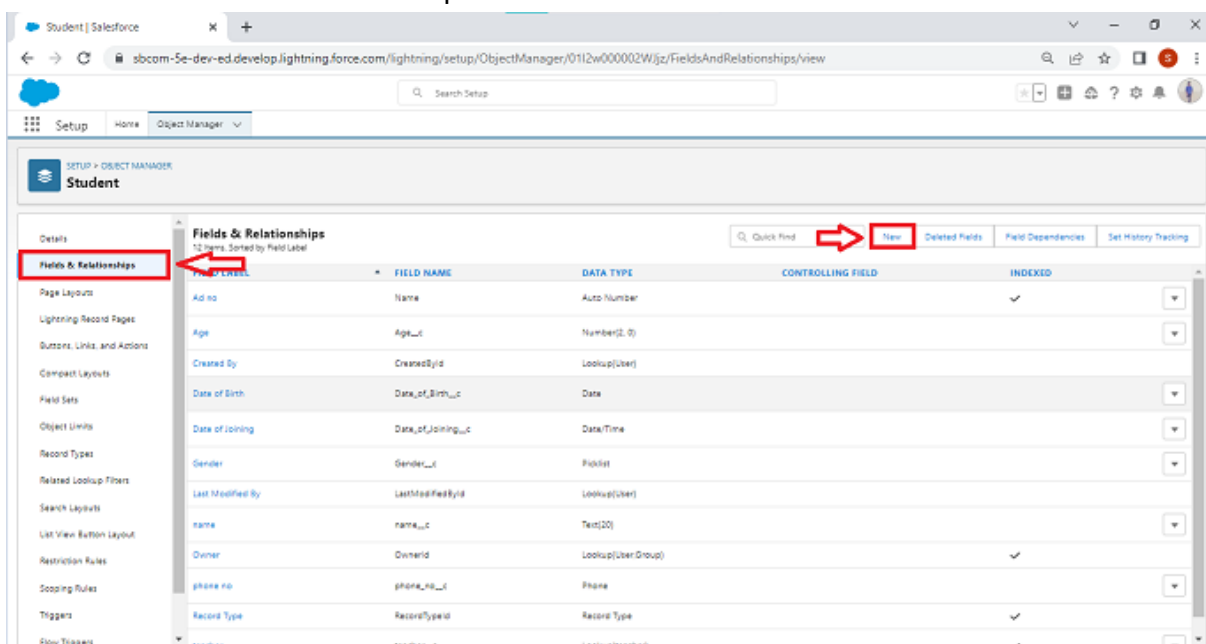
- Select the Text as the Data Type, then click Next.
- For Field Label, Enter Semester Name.
- Click Next, Next, then Save

To create fields in an object:

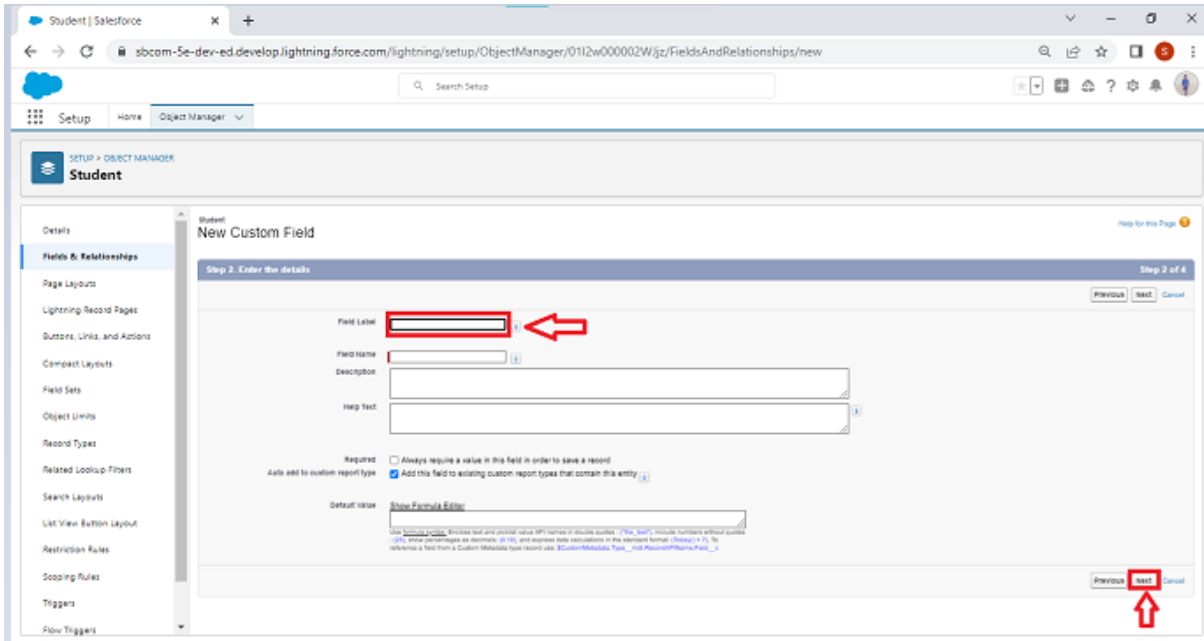
Go to setup → click on Object Manager → type object name in search bar → click on the object.



Now click on “Fields & Relationships” → New



Fill the field label name → Next → Next → Save.



Activity-2: Similarly Create Following Fields according to the objects.

Semester:	Candidate:	Course Details:	Lecturer Details:	Internal results
Semester Name	Candidate Name	Course Name	Lecturer Role	Candidate ID
Course(lookup)	Candidate Id	Course ID	Lecturer Name	Course ID
	Semester Name		Course ID	Marks
	Internal results(lookup)		Course(lookup)	

Milestone-3:Lightning App

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.

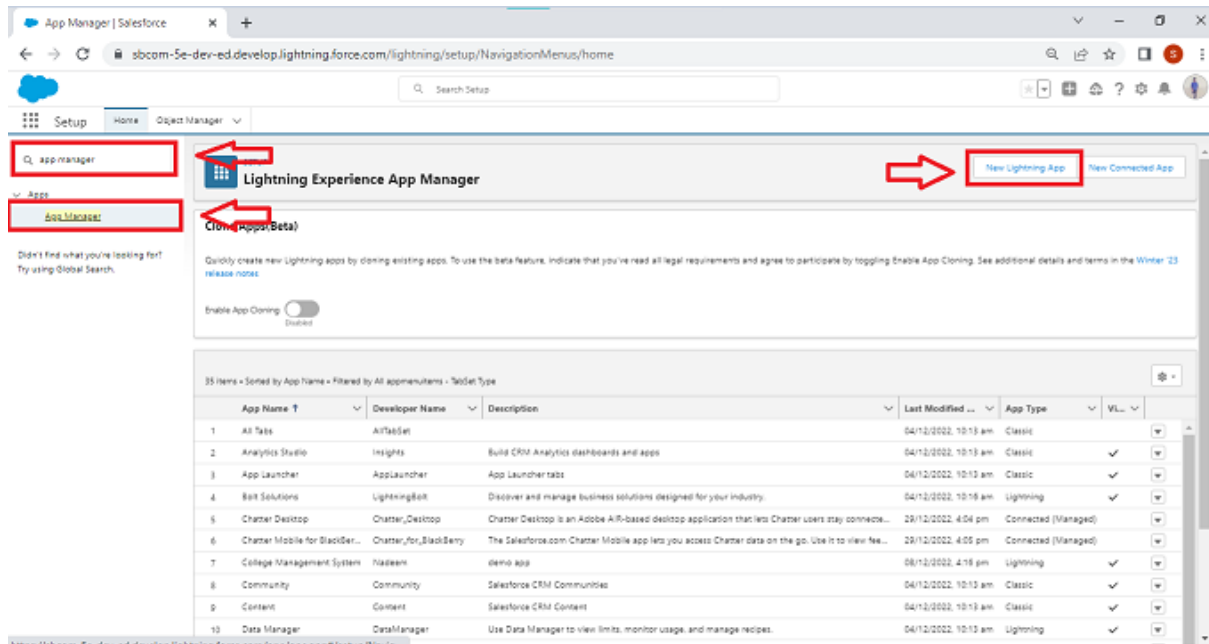
Activity-1:

Create the Candidate Internal Result Card app:

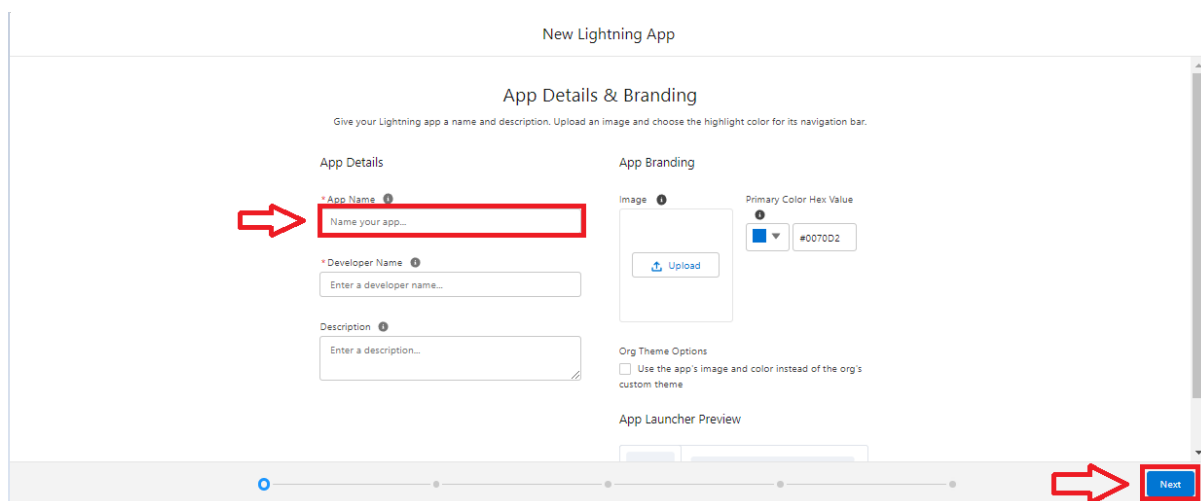
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Candidate Internal Result Card as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Semester,Candidate,Course Details,LecturerDetails,InternalResults and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.

To create a lightning app page:

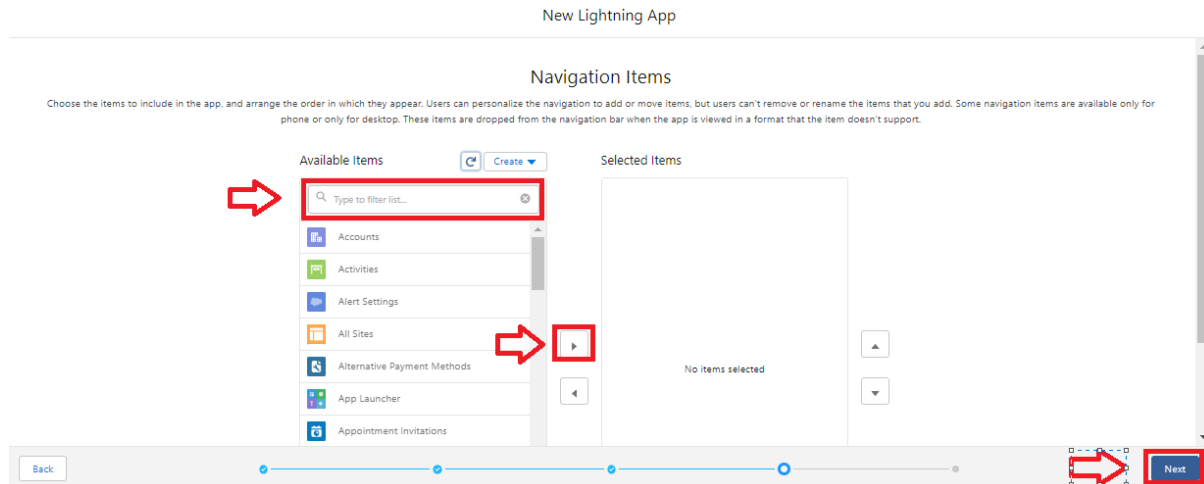
Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.



Fill the app name in app details and branding → Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next → (Add Navigation Items) → Next → (Add User Profile) Add System Administrator → Next.



To Add Navigation Items:
Select the items from the search bar and move it using the arrow button → Next.



To Add User Profiles:

Search profiles in search bar → click on the arrow button → save & finish.

Milestone-4: Users

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.

Activity 1:

Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Martin 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.
4. Select a **Role**(none)
5. Select a User Licence As salesforce.
6. Select a profile as Salesforce 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.

Milestone-5:Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

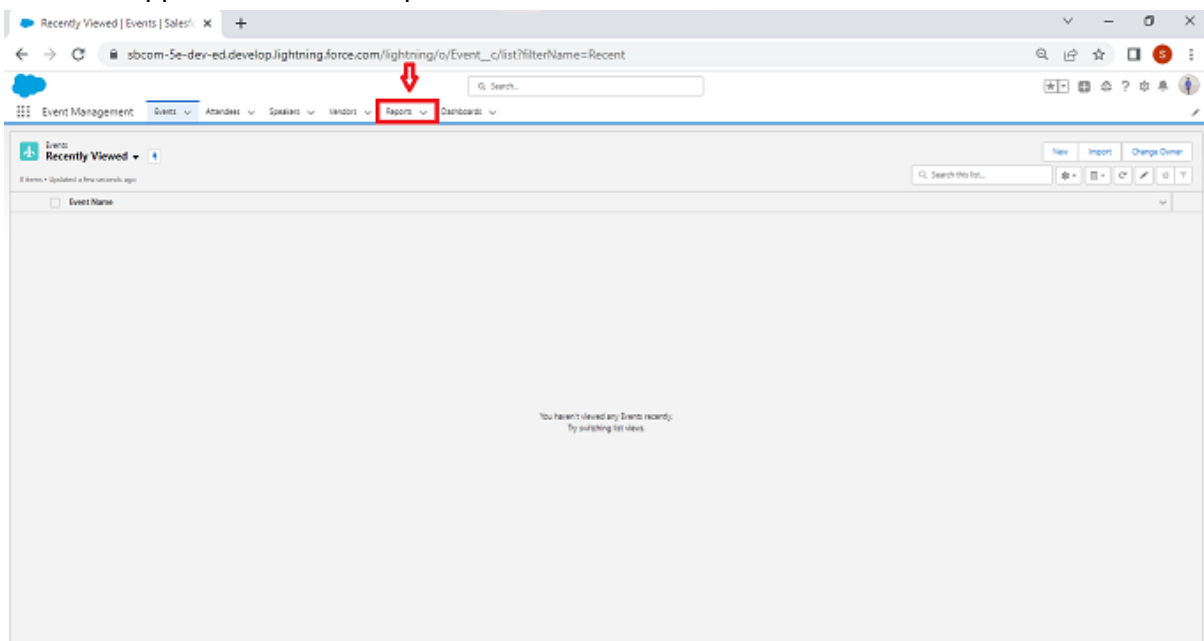
Activity 1:

Reports and dashboards:

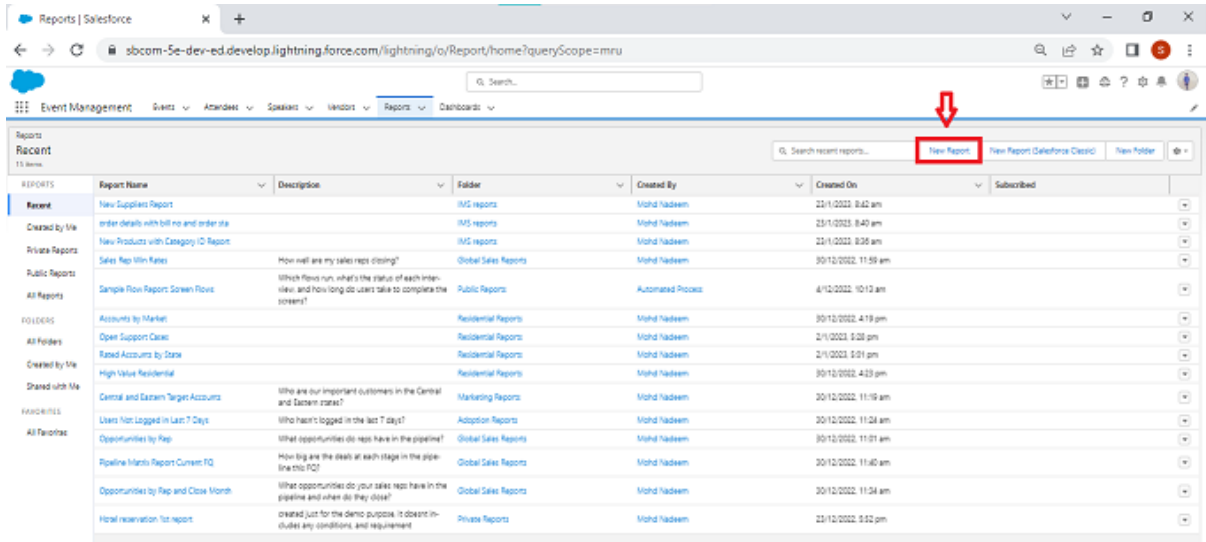
1. From the Reports tab, click New Report.
2. Select the report type as Candidate with candidate Marks for the report, and click Create.
3. Customise your report, then save or run it.

To create a report:

Go to the app → click on the reports tab



Click New Report



Reports | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/r/Report/home?queryScope=mru

Event Management | Quizzes | Assessments | Surveys | Reports | Dashboards

Search recent reports...

New Report New Report (Salesforce Classic) New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Suppliers Report		IMS reports	Mohd Nadeem	23/1/2023 8:42 am	
Created by Me	Order details with bill no and order site		IMS reports	Mohd Nadeem	23/1/2023 8:40 am	
Private Reports	New Products with Category ID Report		IMS reports	Mohd Nadeem	23/1/2023 8:35 am	
Public Reports	Sales Rep Win Rates	How well are my sales reps doing?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:55 am	
All Reports	Sample Row Report Screen Flows	Which flows run, what's the status of each implementation, and how long do users take to complete the screens?	Public Reports	Automated Process	4/12/2022 10:12 am	
FOLDERS	Accounts by Market		Residential Reports	Mohd Nadeem	30/12/2022 4:19 pm	
All Folders	Open Support Cases		Residential Reports	Mohd Nadeem	2/1/2023 9:28 pm	
Created by Me	Rated Accounts by State		Residential Reports	Mohd Nadeem	2/1/2023 9:21 pm	
Shared with Me	High Value Residential		Residential Reports	Mohd Nadeem	30/12/2022 4:23 pm	
FAVORITES	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Mohd Nadeem	30/12/2022 11:19 am	
All Favorites	Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Nadeem	30/12/2022 11:24 am	
	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:01 am	
	Pipeline Metrics Report Current FQ	How big are the deals at each stage in the pipeline this FQ?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:40 am	
	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:24 am	
	Hotel reservation for report	created just for the demo purpose. It doesn't include any conditions, and requirement	Private Reports	Mohd Nadeem	23/12/2022 9:52 pm	

Select report type from category or from report type panel or from search panel → click on start report.

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with SolarBots	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard
Opportunities with Contact Roles	Standard
Opportunities with Partners	Standard
Opportunities with Competitors	Standard
Opportunity History	Standard
Opportunity Field History	Standard
Opportunity Trends	Standard

Details

Accounts

Standard Report Type

Start Report

Details Fields (71)

Created By You

- Accounts by Market Last Used 1/3/2023
- Rated Accounts by State Last Used 1/2/2023
- High Value Residential Last Used 1/2/2023

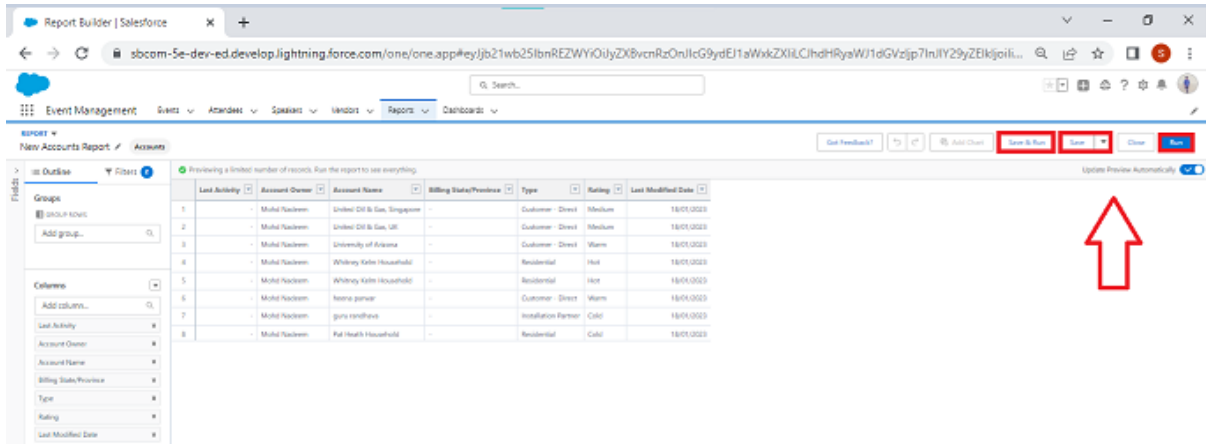
Created By Others

No Reports Yet

Objects Used in Report Type

- Role
- Account
- Operating Hours
- Asset

Customize your report, then save or run it.



The screenshot shows the Salesforce Report Builder interface. The report is titled 'New Accounts Report' and is filtered by 'Accounts'. The table displays the following data:

Lead Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Mohd Nadeem	United Oil & Gas, Singapore	-	Customer - Direct	Medium	18/01/2023
2	Mohd Nadeem	United Oil & Gas, UK	-	Customer - Direct	Medium	18/01/2023
3	Mohd Nadeem	University of Arizona	-	Customer - Direct	Warm	18/01/2023
4	Mohd Nadeem	Whitney Kelle Household	-	Residential	Hot	18/01/2023
5	Mohd Nadeem	Whitney Kelle Household	-	Residential	Hot	18/01/2023
6	Mohd Nadeem	heena parwar	-	Customer - Direct	Warm	18/01/2023
7	Mohd Nadeem	gura randhawa	-	Installation Partner	Cold	18/01/2023
8	Mohd Nadeem	Pat Houth Household	-	Residential	Cold	18/01/2023

Milestone-6:Dashboards:

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

Activity 1:

Create a Dashboard:

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name your dashboard Candidate Board . Leave all other fields as is and click Create.
4. Click + Component.
5. For Report, select Candidate Marksby Stage. Click Select. ...
6. For Display As, select Vertical Bar Chart and click Add.
7. Click Save.
8. Click Done