

**IMPLEMENTING CRM FOR RESULT
TRACKING OF A CANDIDATE WITH
INTERNAL MARKS (DEV) - (SHORT-TERM)**

TEAM ID:LTVIP2023TMID11578

TEAM SIZE:4

TEAM LEADER:S.ASIFA

TEAM MEMBER:KOKILA.M

TEAM MEMBER:M.INDU

TEAM MEMBER:N.HEMALATHA

Create Salesforce Org

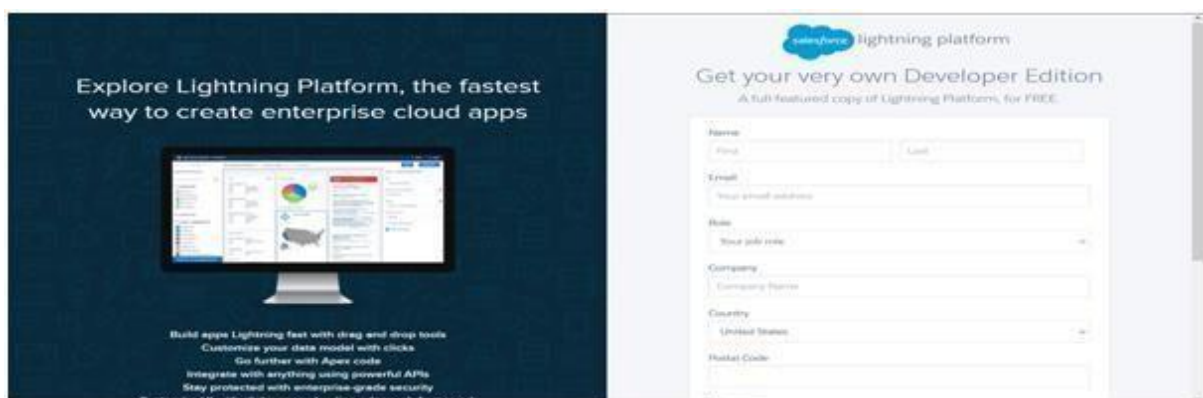
**Creating Developer
Org**

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

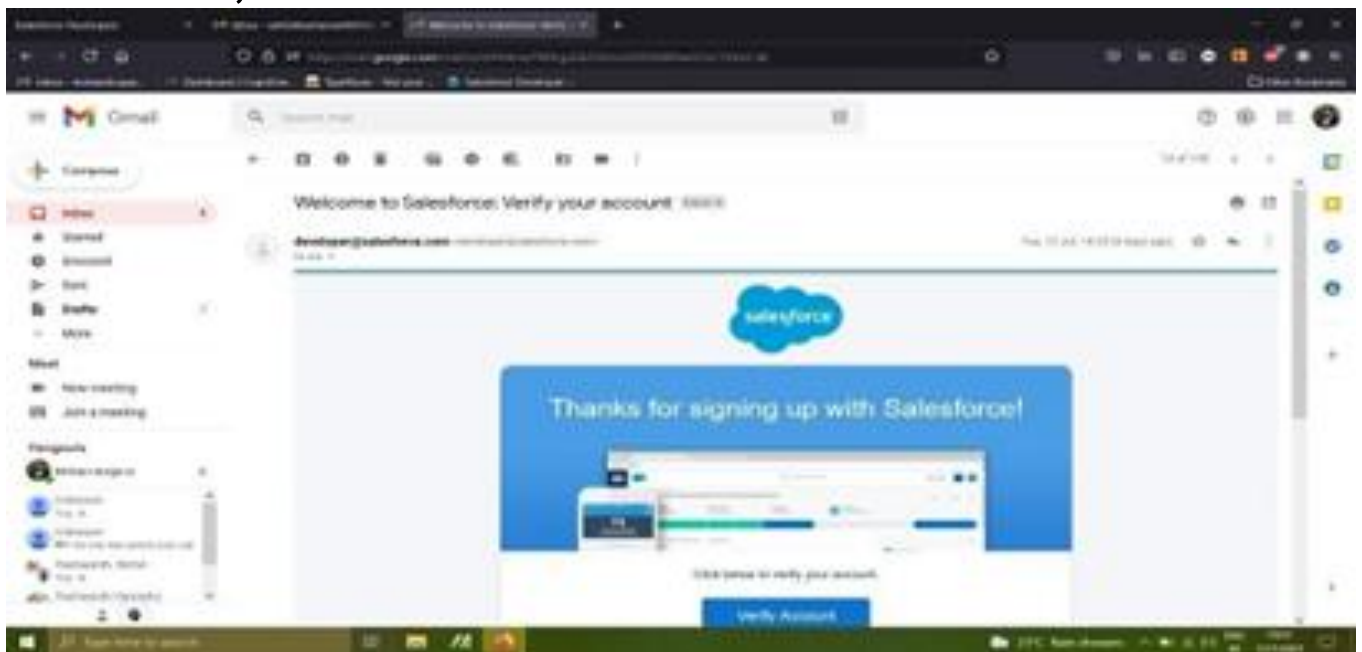
This need not be
an actual email id,
you can give
anything in the
format: **username**
@organization.com

Click on sign up after filling
these.



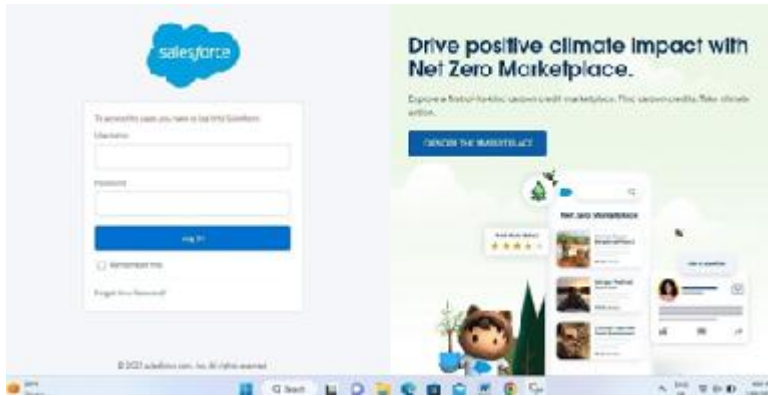
Account Activation

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 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.

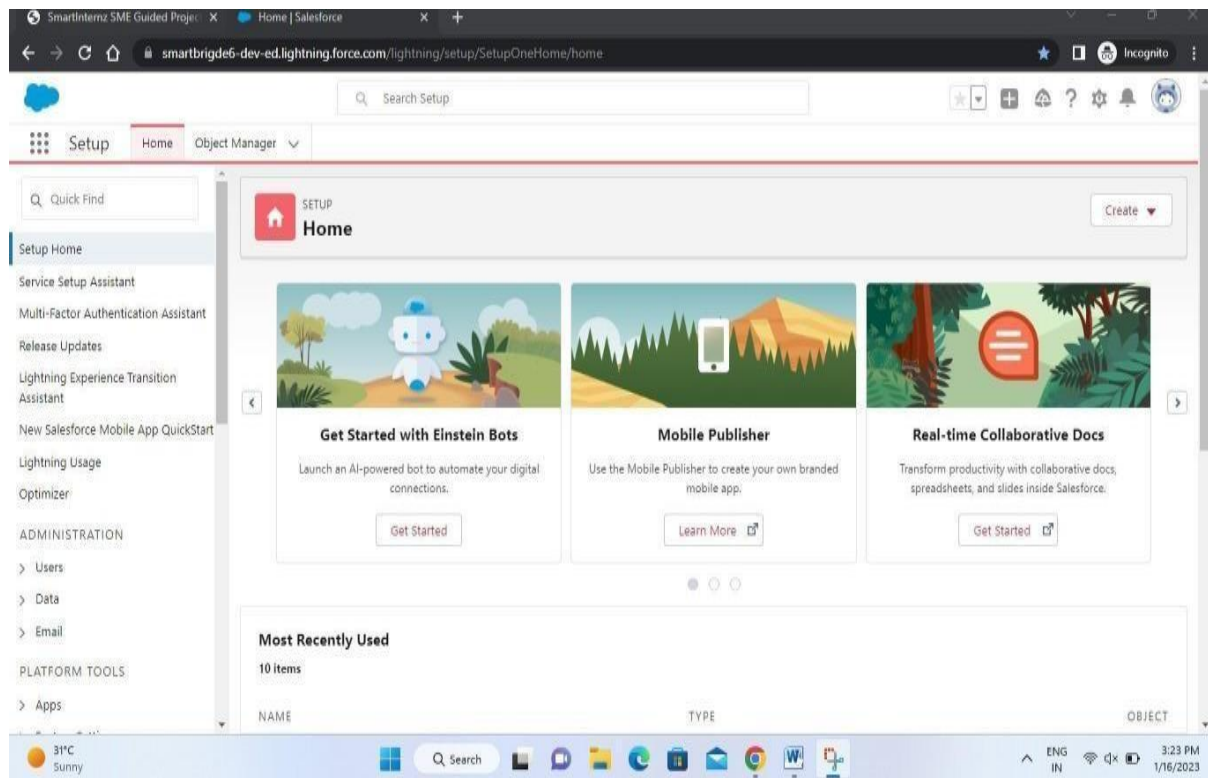


Salesforce Login

<https://login.salesforce.com>

Login to Your Salesforce Account

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2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Creation Of Semester Object For Candidate Internal Result Card

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

4. On the Custom Object Definition page, create the object as follows:
5. Label: Semester
6. Plural Label: Semesters
7. Record Name: Semester Name
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save.

In the same way create **4** more objects as **Candidate**, **Course Details**, **Lecturer Details** and **Internal results**.

SETUP
New Custom Object

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Creation Of Semester Object For Candidate Internal Result Card

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Semester
6. Plural Label: Semesters
7. Record Name: Semester Name
8. Check the Allow Reports
9. Check the Allow Search
10. Click Save.

In the same way create **4** more objects as **Candidate, Course Details, Lecturer Details** and **Internal results**.

Search Setup

Setup Home Object Manager 2

SETUP

New Custom Object

The singular and plural labels are used in tabs, page layouts, and reports:

Label Semester Example: Account

Plural Label Semesters Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Semester Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name --None--

Enter Record Name Label and Format

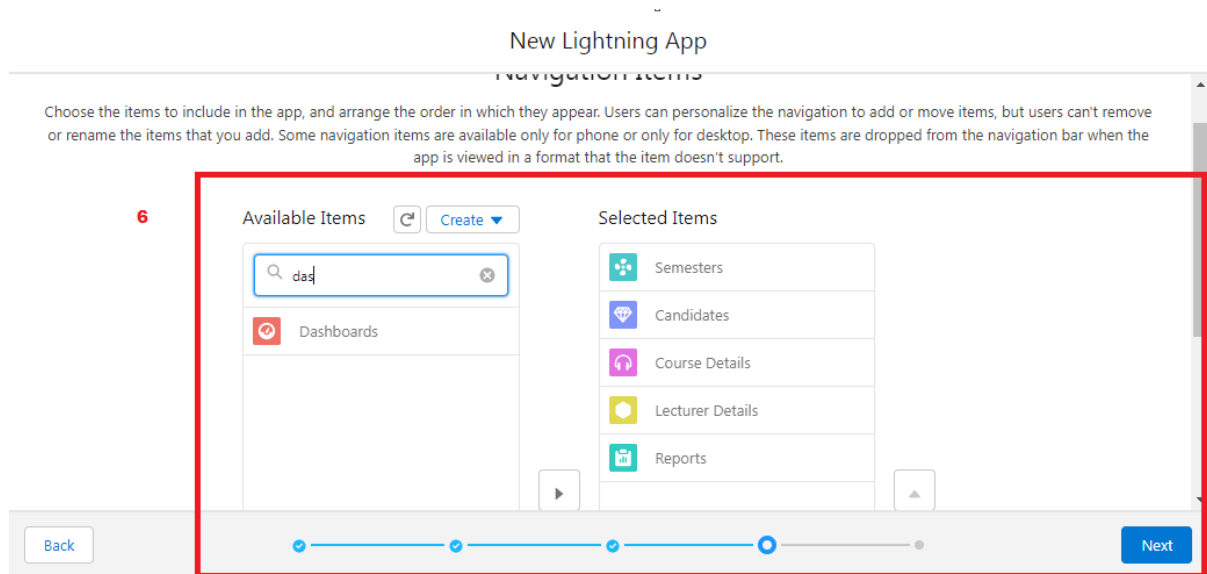
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Semester Name Example: Account Name 7

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, Internalresults, 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.



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.

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

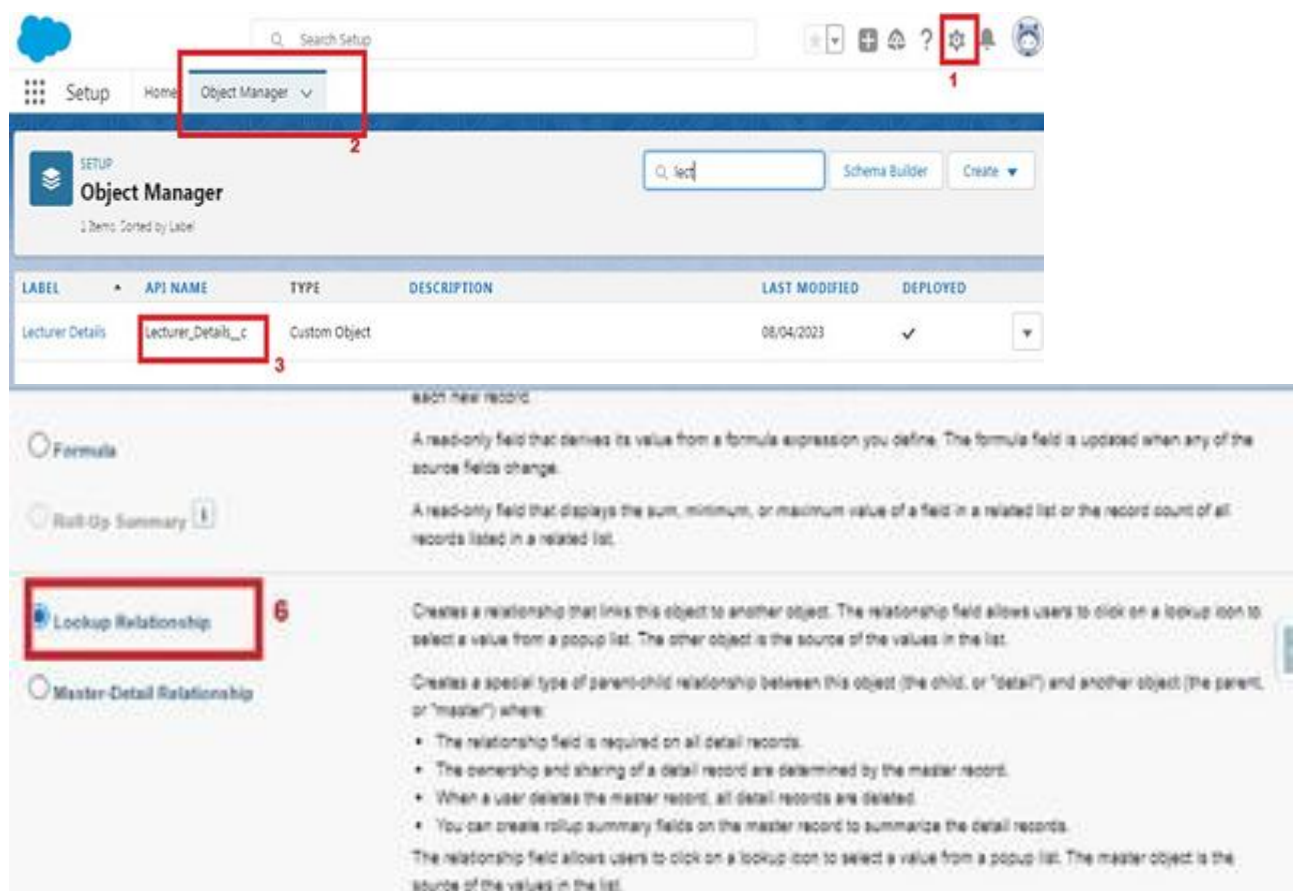
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Lecturer Details
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click next.
7. For Field Label, enter Lecturer Role
8. Enter Length 40
9. Click Next, Next, then Save & New.

The image displays two identical screenshots of the Salesforce 'Step 2. Enter the details' page for a new field. The page is titled 'Step 2 of 4' in the top right corner. In the top right corner, there are three buttons: 'Previous', 'Next', and 'Cancel'. The 'Next' button is highlighted with a red box and labeled with a red '9'. The 'Field Label' is 'Lecturer Role', which is highlighted with a red box and labeled with a red '7'. The 'Length' is '40', which is highlighted with a red box and labeled with a red '8'. The 'Field Name' is 'Lecturer_Role'. Below the 'Field Name' are two text areas for 'Description' and 'Help Text'. The page is divided into two sections, each showing the same form.

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 & Ne



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

4. 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.



Fields & Relationships

11 Items, Sorted by Field Label

Quick Find: **New** Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedBy	Lookup(User)		

Field Label **6**

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name **6**

Description

Help Text **7**

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

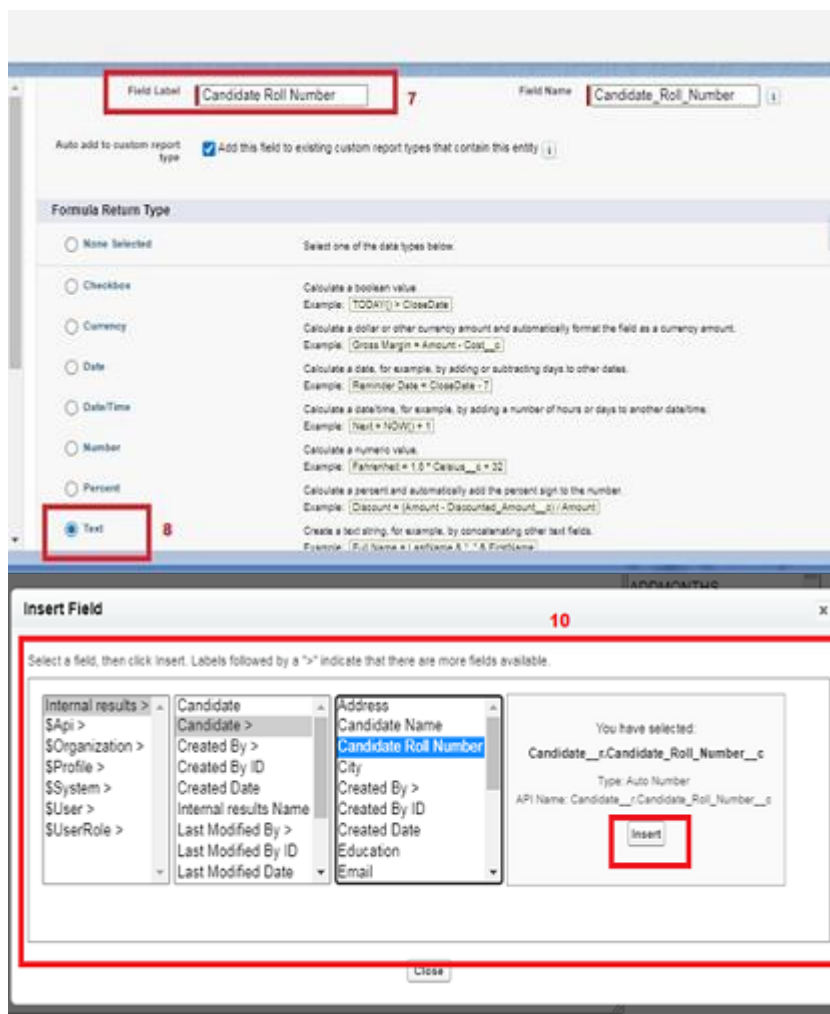
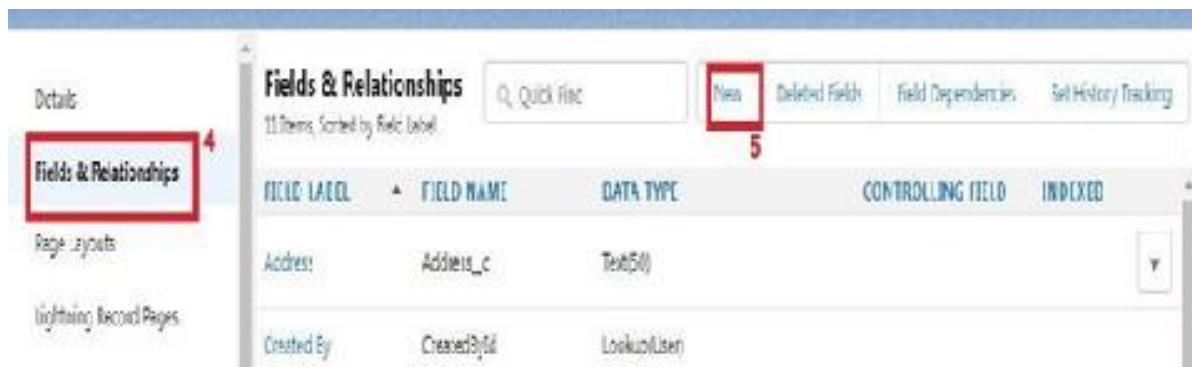
8. Select formula return type text, Click Next

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.





Now Let's create an auto number 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 Auto Number as the Data Type, then click Next.
7. For Field Label Candidate enter Roll Number.
8. Give a display format
9. Click Next, Next, then Save & Ne

Fields & Relationships

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(50)		
Created By	CreatedById	Lookup(User)		

Select one of the data types below:

- ☒ **Auto Number** (6)
- ☐ Formula
- ☐ Roll-Up Summary (1)

Step 2. Enter the details

Field Label: (7)

Display Format: Example: A-(0000) What is This?

Starting Number: (8)

☐ Generate auto numbers for existing records

Field Name:

Description:

Help Text: (8)

Previous Next Cancel

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 and a 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.

User Edit Save Save & New Cancel

General Information

First Name: 4

Last Name: 4

Alias: 4

Email: 4

Username: 4

Nickname: 4

Role: 5

User License: 5

Profile: 6

Active: ☒ 6

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Setup Home Object Manager

Q user 1

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users 2

Feature Settings

Data.com

Prospector Users

User Interface

Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

New User 3 Reset Password(s) Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1. User	u1	utkarsh2@vanshiv.com	Operator 1	✓	operator
<input type="checkbox"/> Edit	2. User	u2	utkarsh3@vanshiv.com	Operator 2	✓	operator
<input type="checkbox"/> Edit	Chatter Export	Chatter	chattv00d2w00000rs8akeaj.mv/rkixf1@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Technologies Vanshiv	VTech	vehicledemo@vanshiv.com		✓	System Administrator
<input type="checkbox"/> Edit	Teddy John	l.ted	utkarsh1@vanshiv.com	Vehicle Manager	✓	Vehicle Manager

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.

The screenshot shows the 'New Course Details' form. The 'Information' tab is active. The 'Course Name' field is filled with 'MBA' and the 'Duration' field is filled with '2'. The 'Owner' field shows 'Vanshiv Technologies'. The 'Save' button is highlighted with a red box and a red number 6.

Setup Home Object Manager

Search Candidate Internal Result Card

Apps

Candidate Internal Result Card

Items

No results

View All

2

Home

Create

New Course Details

Information

* Course Name

MBA

Duration

2

Owner

Vanshiv Technologies

5

6

Cancel Save & New Save

View Record (Course Details)

Viewing the Records of Course Detail 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 any record name. you can see the details of the Driver

The screenshot illustrates the steps to view course details in a web application. Red boxes highlight the following elements:

- The App Launcher icon (a 3x3 grid) in the top-left corner.
- The search bar containing the text "Candidate Internal Result Card" and the resulting app card below it.
- The "Course Details" tab in the navigation bar.
- The "Course Name" column in the table, with the first row "BCA" highlighted.

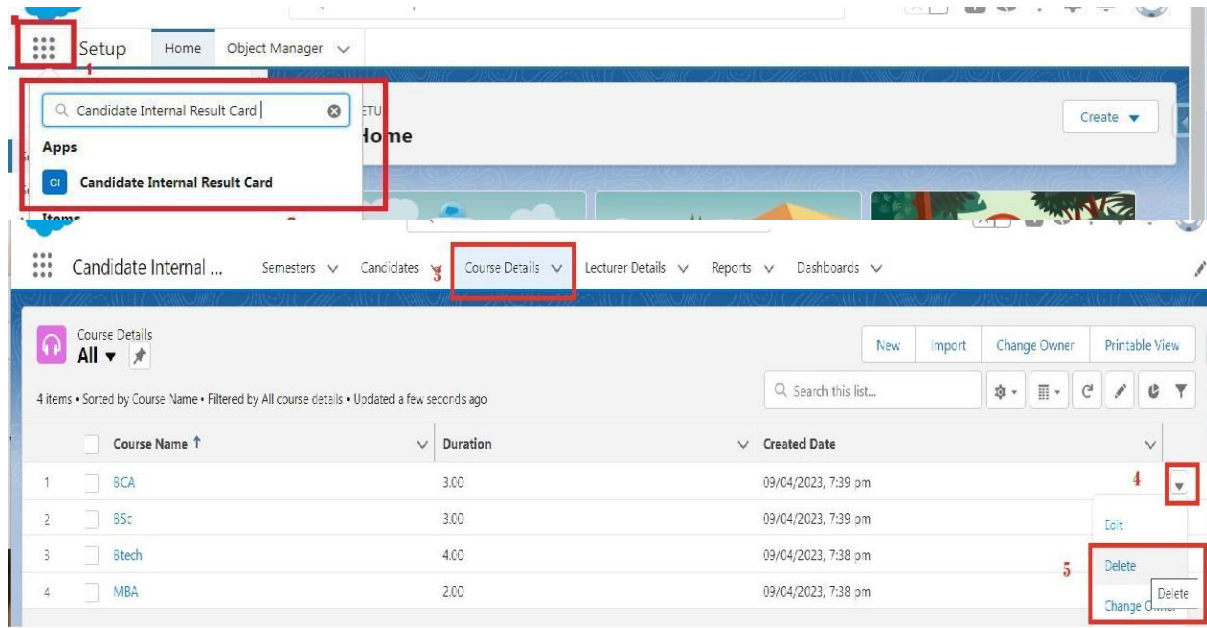
The application interface includes a top navigation bar with "Setup", "Home", and "Object Manager" tabs. Below the app launcher, there is a search bar and a list of apps. The "Course Details" tab is selected in the navigation bar. The main content area shows a table of course details.

	Course Name ↑	Duration	Created Date
1	BCA	3.00	09/04/2023, 7:39 pm
2	BSc	3.00	09/04/2023, 7:39 pm
3	Btech	4.00	09/04/2023, 7:38 pm
4	MBA	2.00	09/04/2023, 7:38 pm

Delete Record (Course Details)

Deleting Records of Course Details
Object

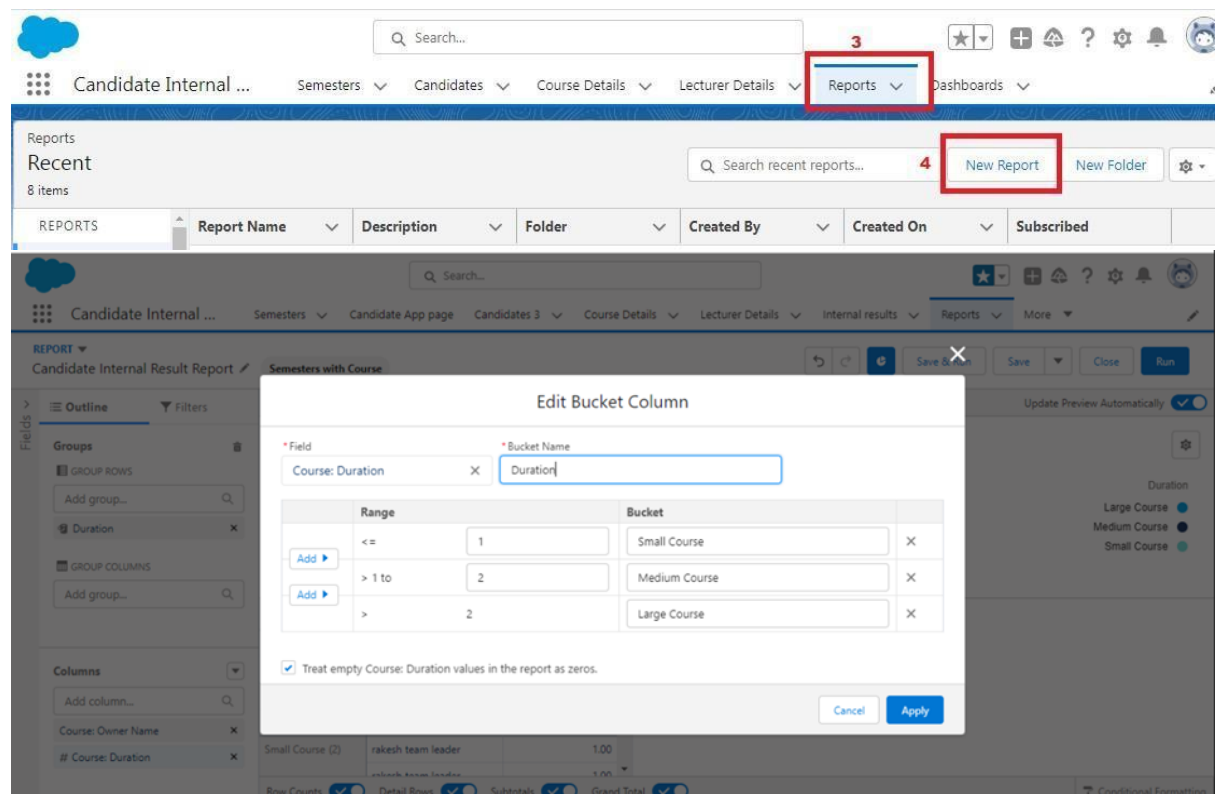
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



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



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.

Field: Course: Duration

Bucket Name: Duration

Range	Bucket
<= 1	Small Course
> 1 to 2	Medium Course
> 2	Large Course

☒ Treat empty Course: Duration values in the report as zeros.

Buttons: Cancel, Apply

Save Report

Report Name: Candidate Internal Result Report 9

Report Unique Name: Candidate_Internal_Result_Report_bkY

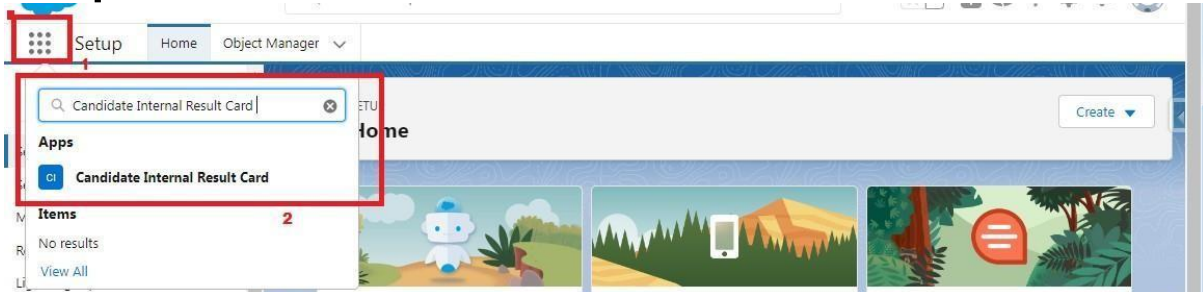
Report Description:

Buttons: Cancel, Save 10

View Report

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.

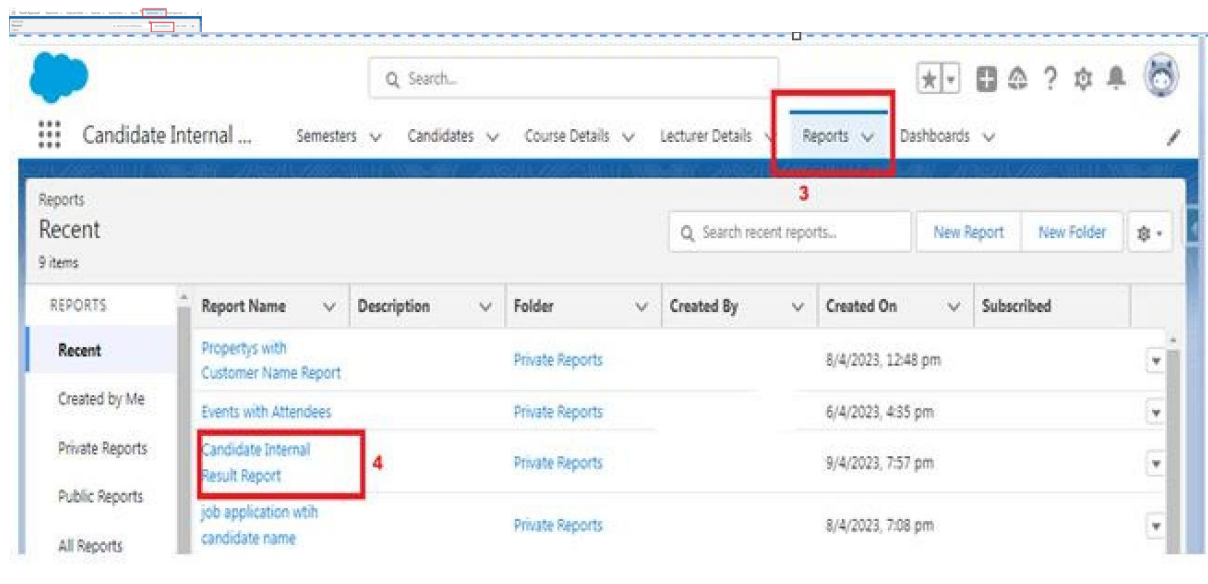
3. Click on Reports Tab.
4. Click on Candidate Internal Result Report and see records.

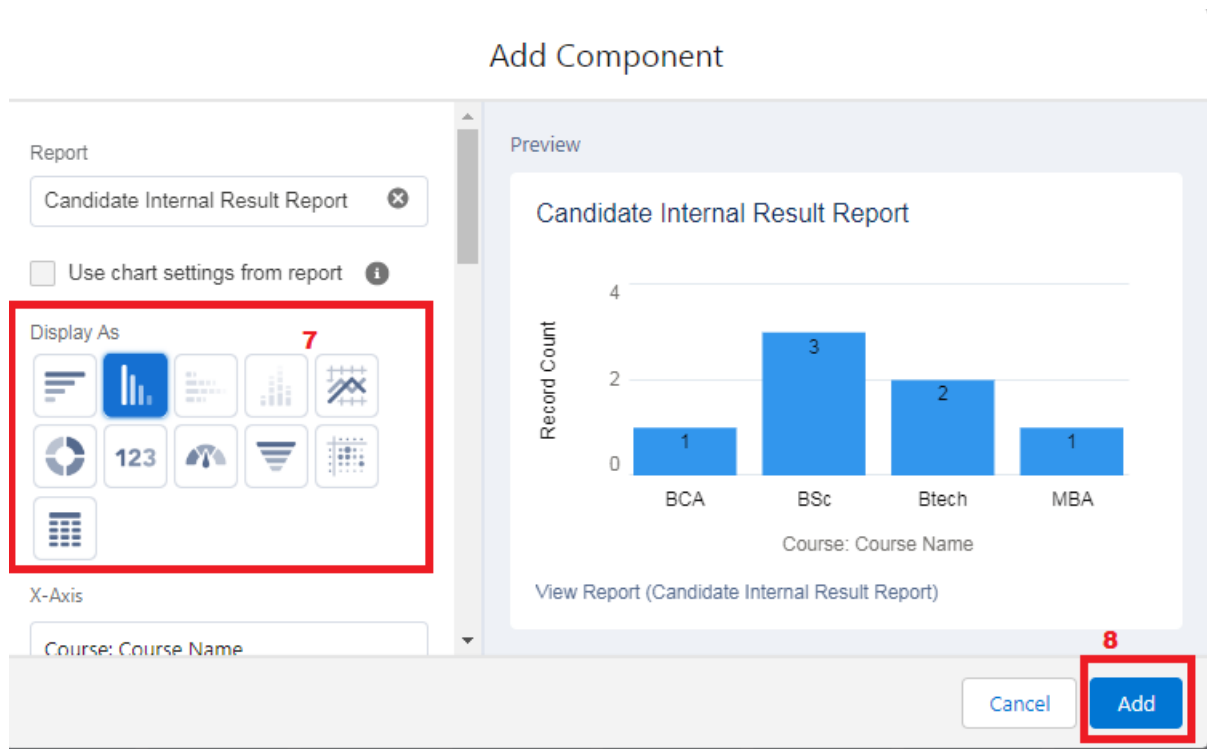


Create Dashboard

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.

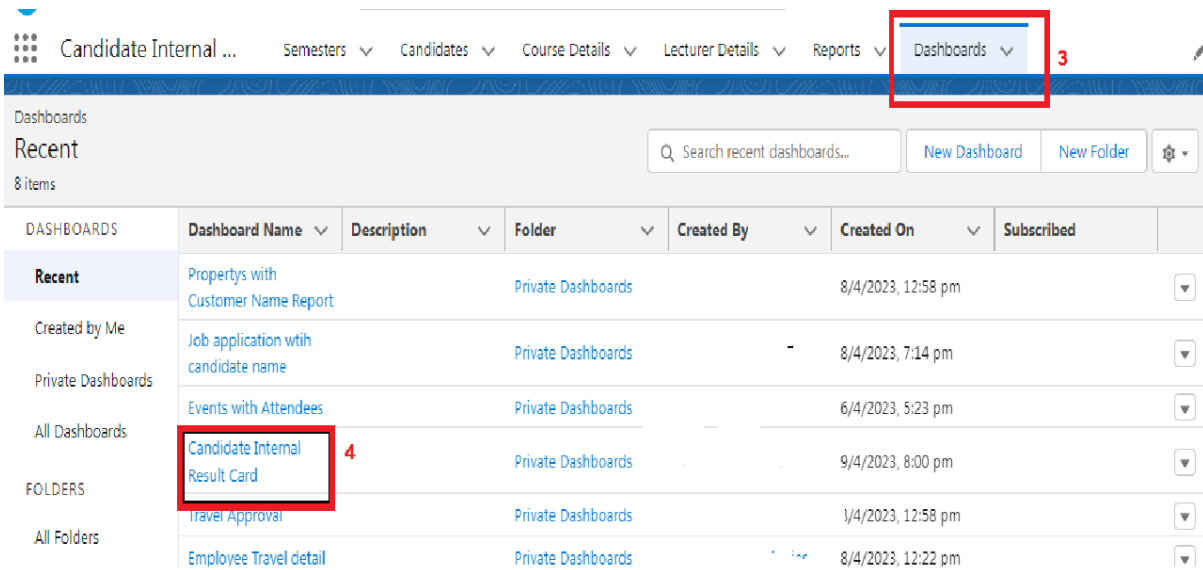
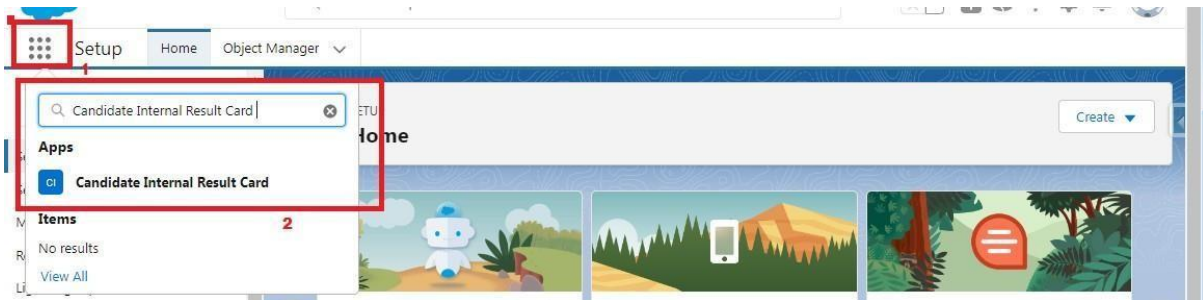
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.





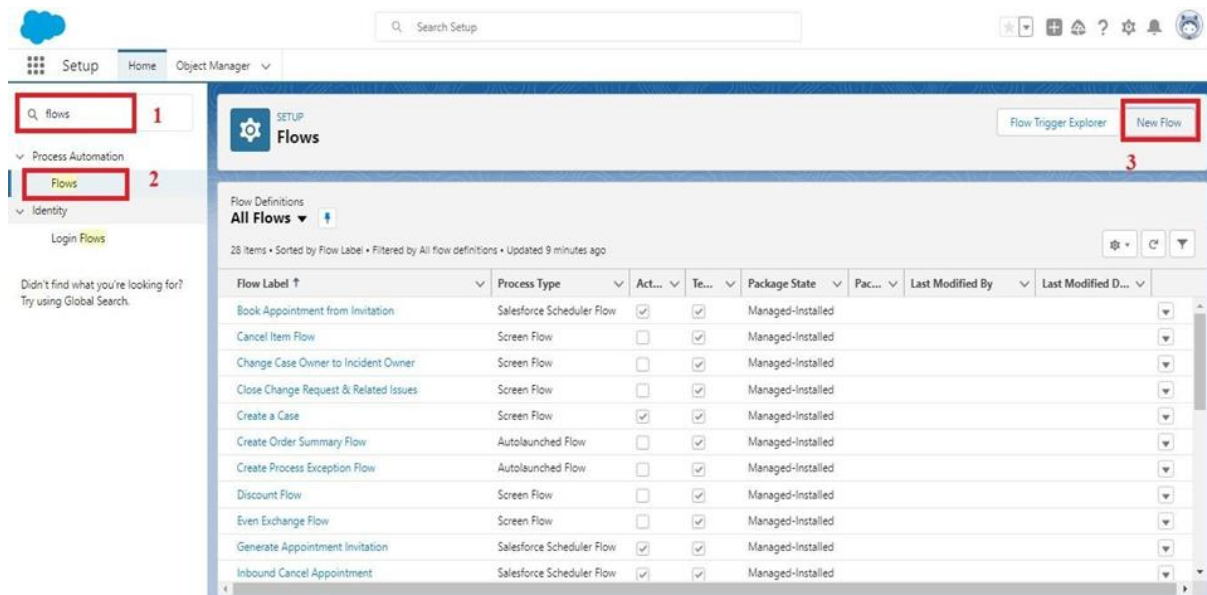
View Dashboard

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



Create A Screen Flow

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow

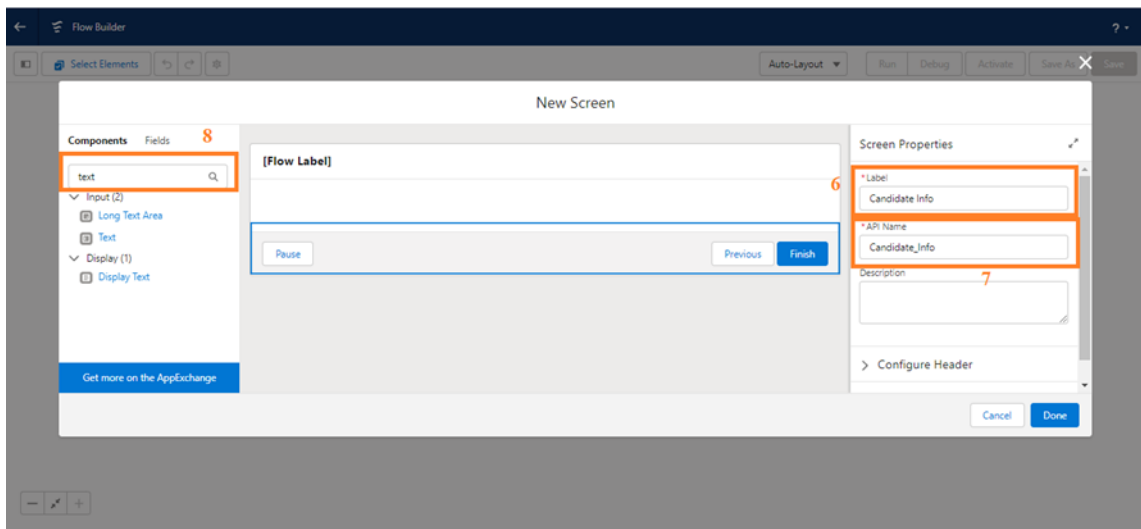


6.It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

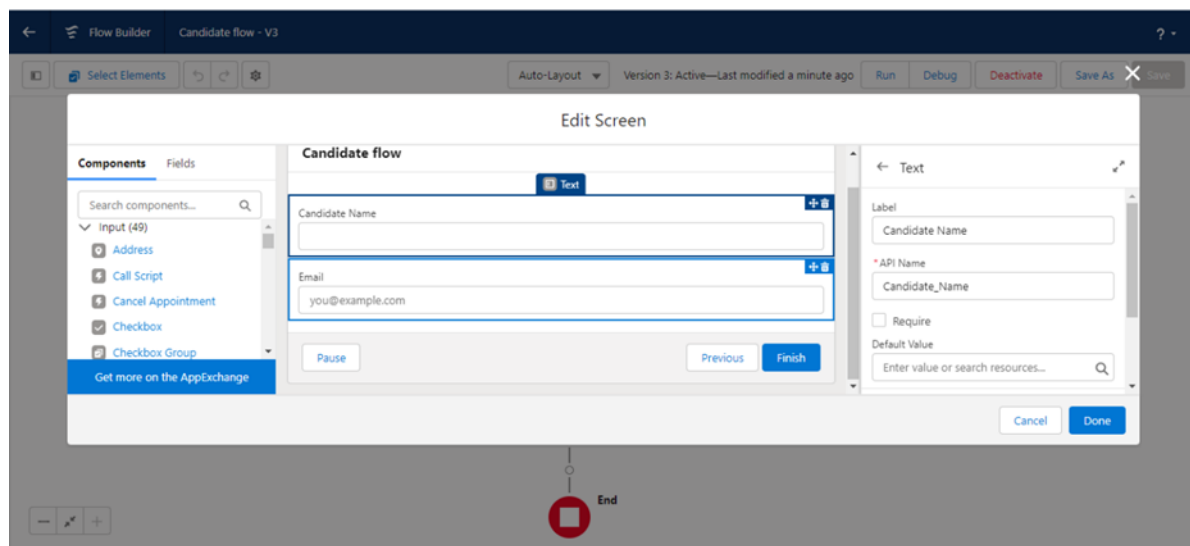
Label: Candidate info

API Name: Candidate_Info (This field will be auto populated.)

7..In search Component type text and drag the text component to canva and give the label and Api Name

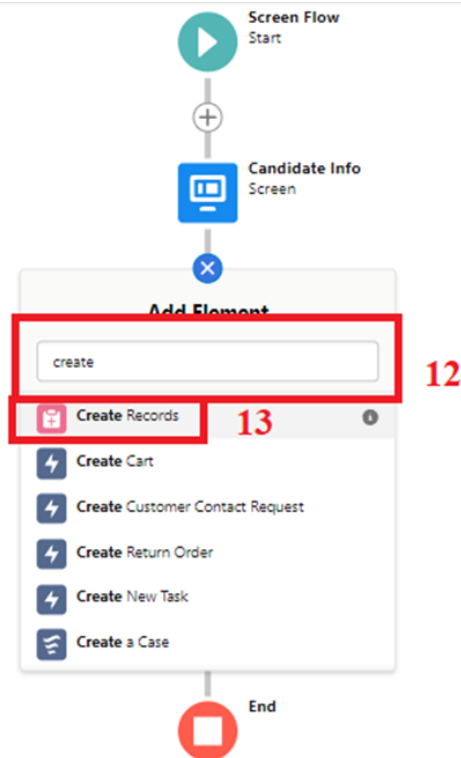


8. 8. Similarly, Add Email Component also.



4. 9. Select (+)

5. 10. In search bar search for Create records and select the create records



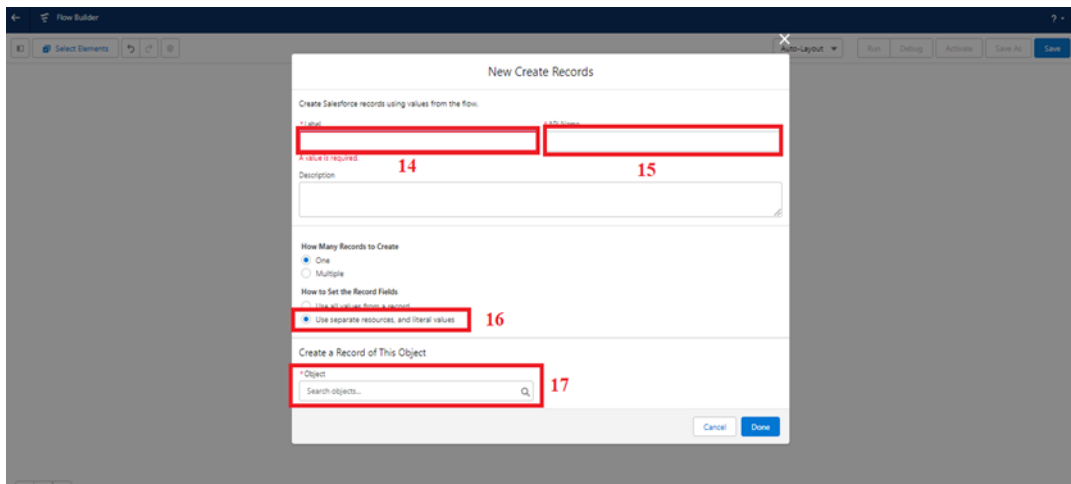
11. It will open you the details section and give the label as follows:

Label: Create
candidate
Records

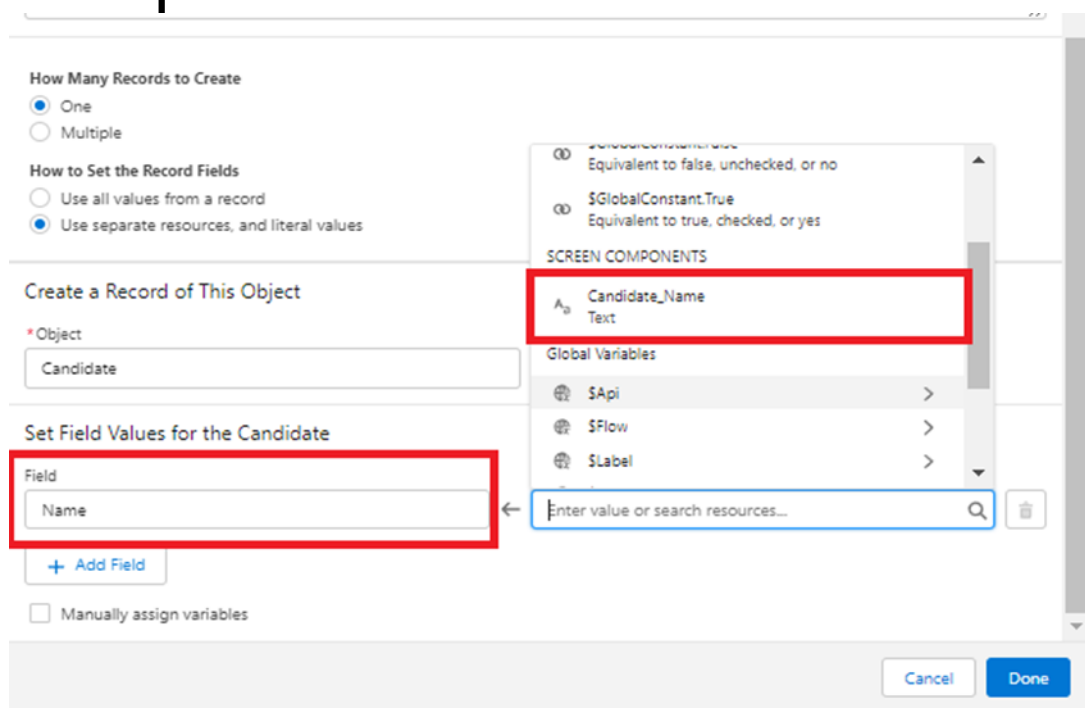
API Name:

Create_candidate_Records

Then check the use separate resources and literal values Search for candidate Object



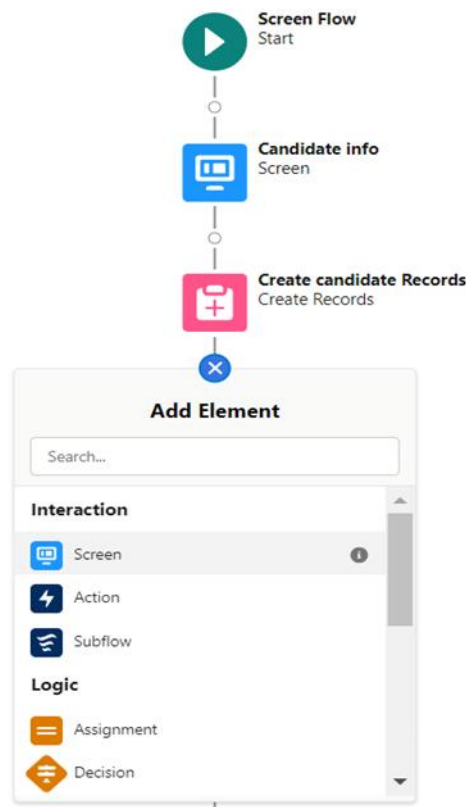
12. Under field type name and select the name and select the candidate_name under Screen Component



13. Click on Done

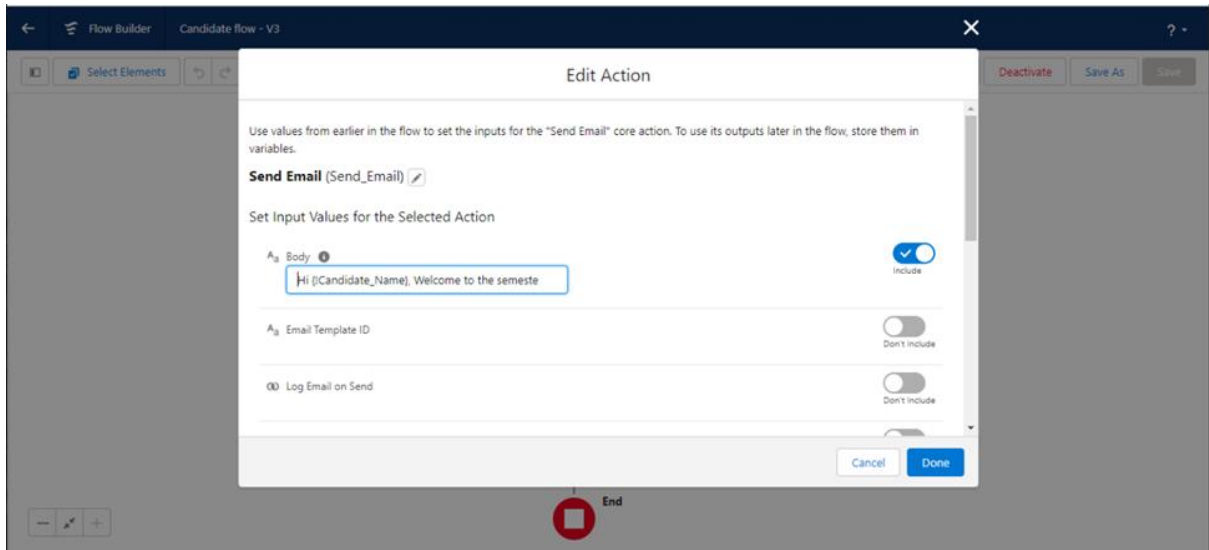
14. Click on Save. It will open your details canvas and give the details as follows:

15. Select (+)



16. Select the Action element from the drop down.

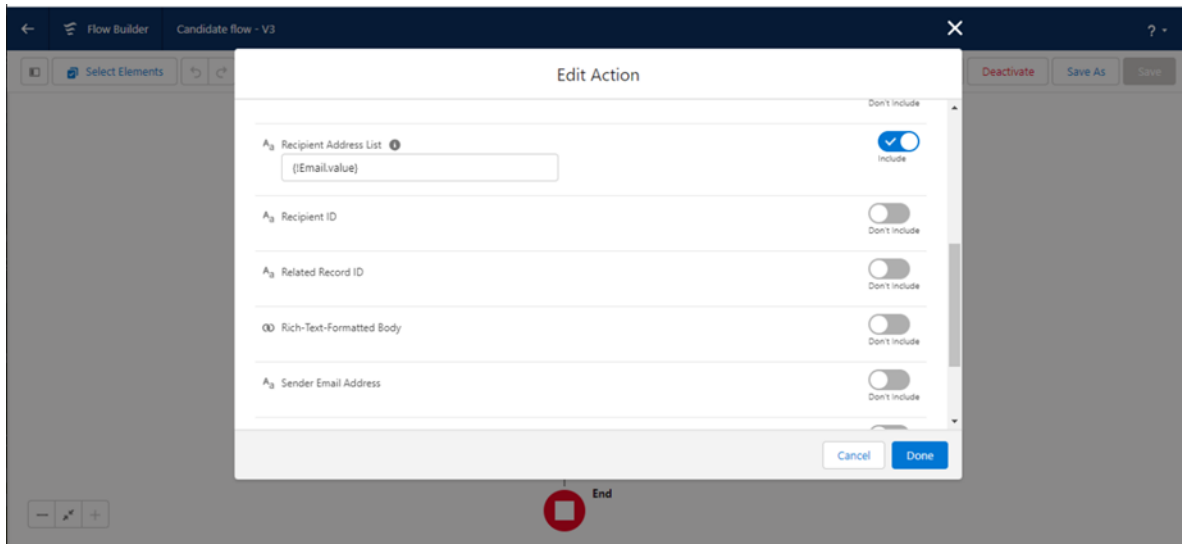
17. Enable Body and Give Hi {!Candidate_Name}, Welcome to the semester



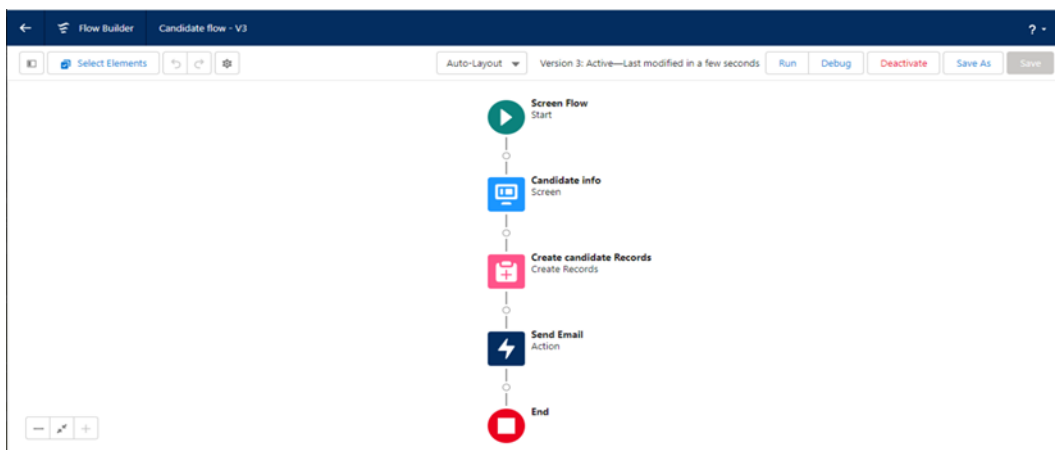
18.Enable Recipient Address List and Give {!Email.value}

Create An App Page

1. Click on the Gear icon and select set up.
2. In Quick Find Box . Type app Builder and select the lighting app builder
3. Select New



19.Enable Subject and Give Welcome

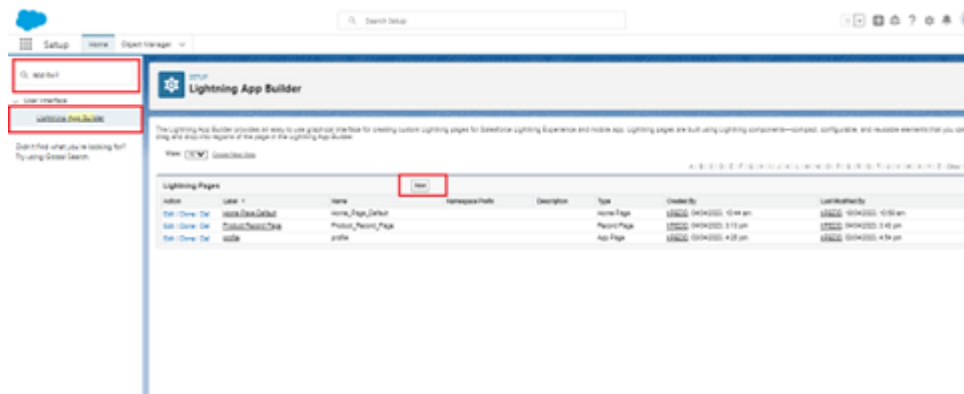


Flow label: Candidate flow

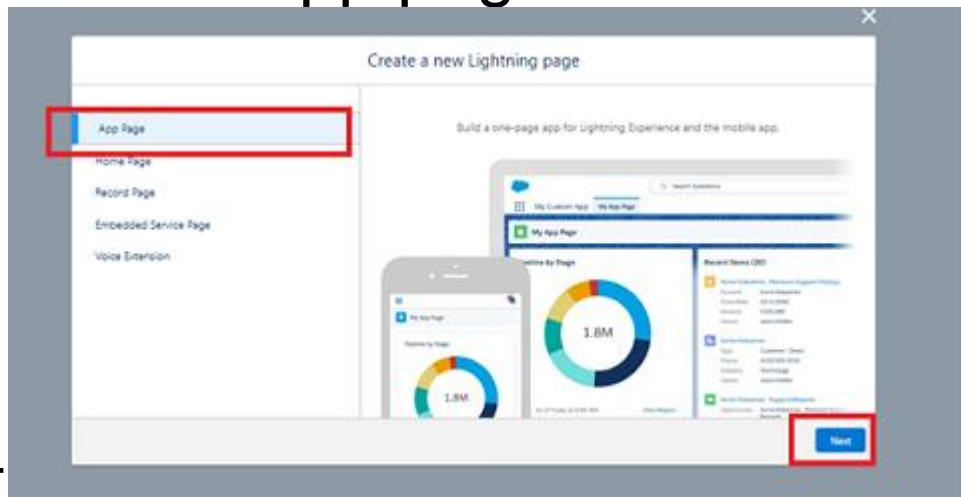
Flow API Name: Candidate_flow (this will be auto populated)

20.Click on save

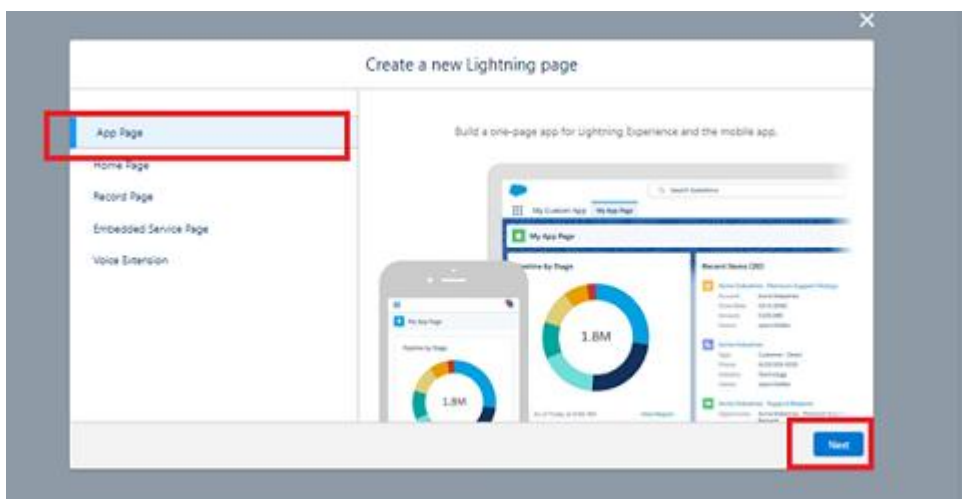
21. Click on the Activate.

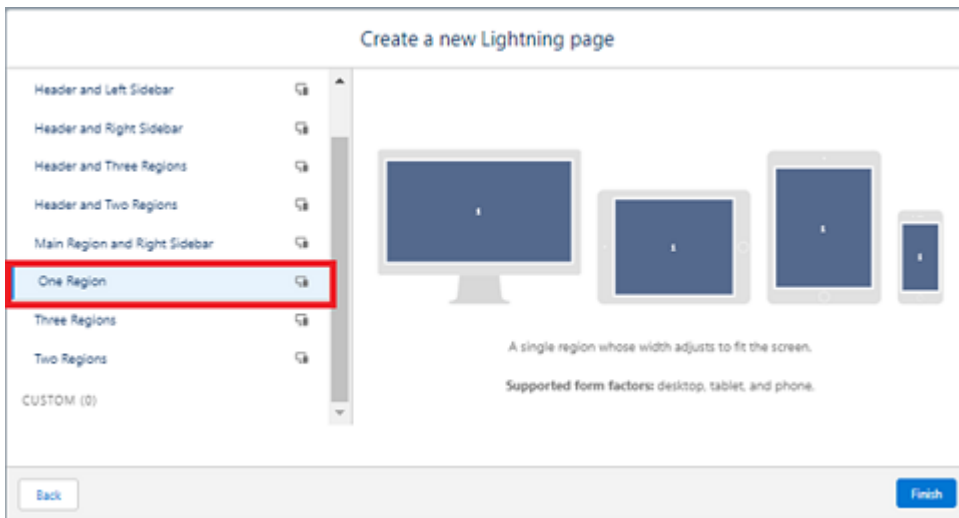


4. Select the App page and click on



Next





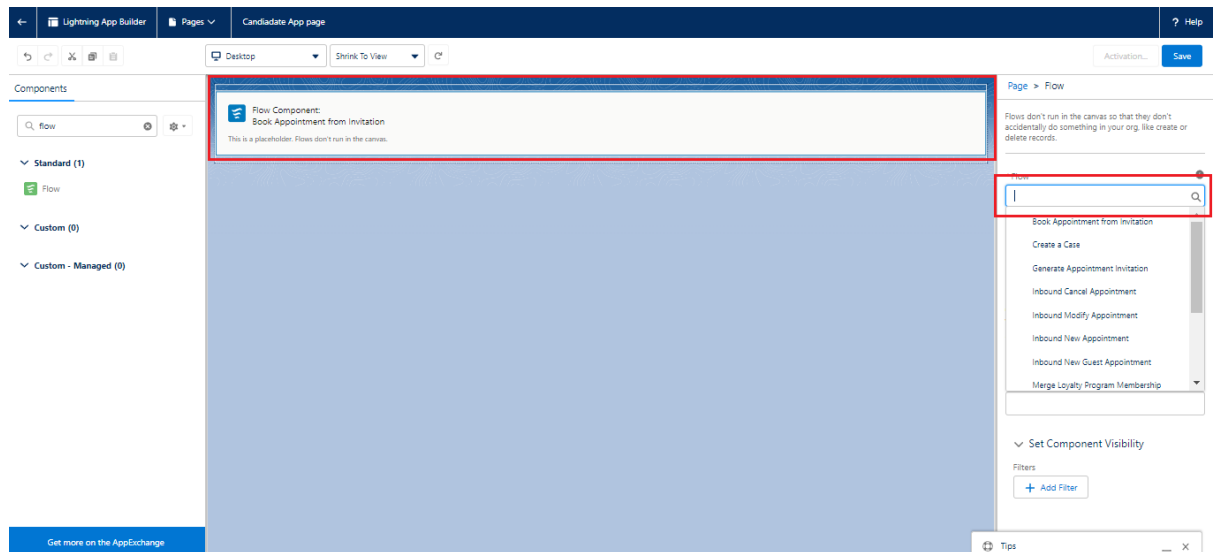
6.

6. Type the flow in the search bar and select the flow component and drag the component to the Add components here.



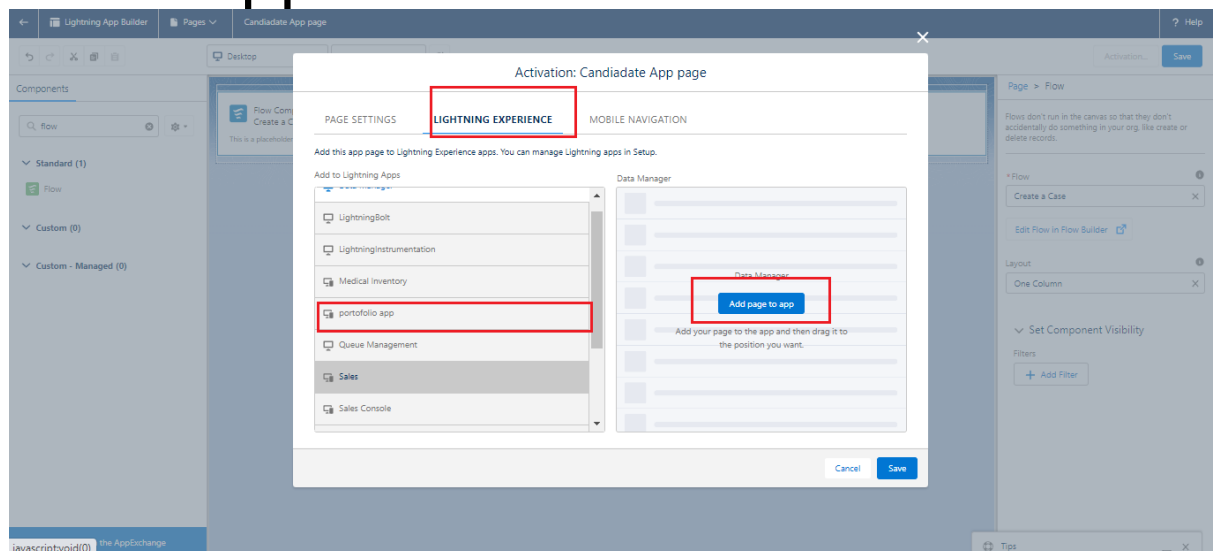
7. 8. After dragging the component, give the flow label in the flow search and then click on save and then click on activate.

Flow label: Candidate flow



8.

9. After clicking on the activate it will open a page and then select the lightning experience and select the app and then click on add page to the app.



Field Update Using Trigger

9. Whenever a internal Marks is inserted if the marks is greater than or equal to 200 it must update the status field to Pass or else it must update to fail

10.

11. 1. Go to the gear icon and select the developer console.

12. 2. From the menu bar click on file and select Apex class.

13. 3. Now give the class name as InternalmarksHandler

14. 4. Now Write the below code

```
1 public class InternalmarksHandler {  
2     public static void beforeinsert(list<Internal_result__c> newlist){  
3  
4         for(Internal_result__c internalmarks : newlist){  
5             if(internalmarks.marks__c >= 200){  
6                 internalmarks.status__c = 'Pass';  
7             }else{  
8                 internalmarks.status__c='fail';  
9             }  
10        }  
11    }  
12 }
```

15.

16. public class InternalmarksHandler {

17. public static void

beforeinsert(list<Internal_result__c>
newlist){

18.

19. for(Internal_result__c
internalmarks : newlist){

20. if(internalmarks.marks__c >=
200){

21. internalmarks.status__c =
'Pass';

```
22.         }else{
23.
    internalmarks.status__c='fail';
24.         }
25.
26.     }
27.
28. }
29. }
30.
```

31.

32. 5. From the menu bar click on file and select Apex trigger.

33. 6. Now give the trigger name as Internalmarks

34. 7. Now write the below code

```
1 trigger Internalmarks on Internal_result__c (before insert) {
2     If(trigger.isInsert)
3     {
4         If(trigger.isBefore)
5         {
6             InternalmarksHandler.beforeinsert(trigger.new);
7         }
8     }
9
10 }
```

35.

```

trigger Internalmarks
on Internal_result__c(before insert,after
update) {
    If(trigger.isInsert)
    {
        If(trigger.isBefore)
        {

```

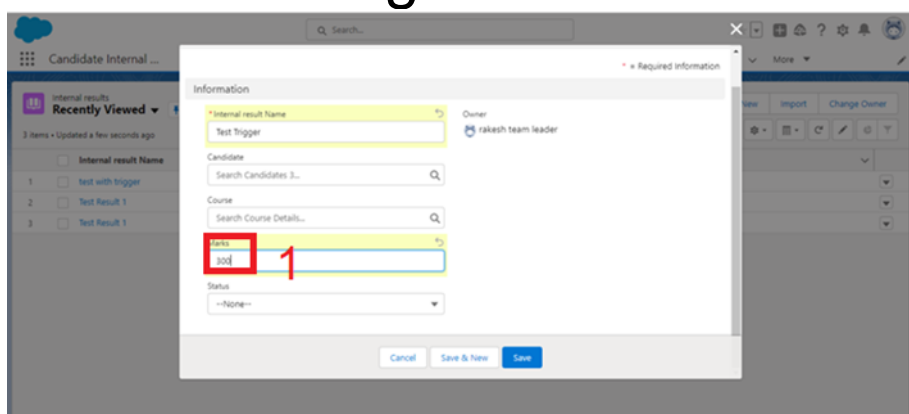
```

InternalmarksHandler.beforeinsert(Triquer
.new);
        }
    }
}


```

36. 8.Trigger Working as follows:

In the following record Marks field is given as 300,Now trigger triggers and status changes to Pass








37.

 Internal result

Test Trigger

Related

Details

Internal result Name		Owner
Test Trigger		 rakesh team leader
Candidate		
Course		
Marks		
300		
Candidate Roll Number		
Status		
Pass	