

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

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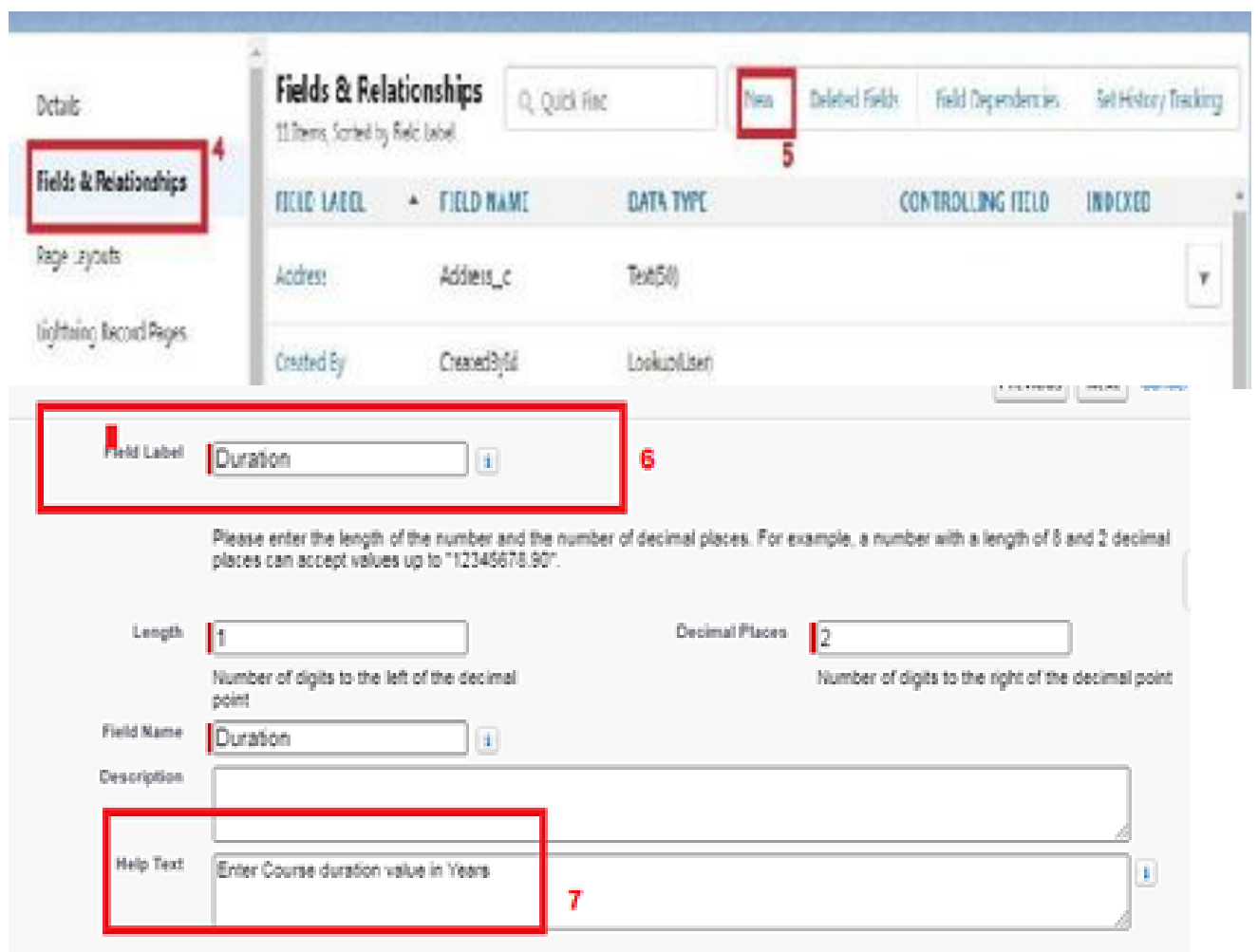
**Creation Of Auto
Number Field On
Candidate Object,
Number Field On
Course Details Object
& Formula Field Course**

Details Object.

Let's create a Number field on Course Details object

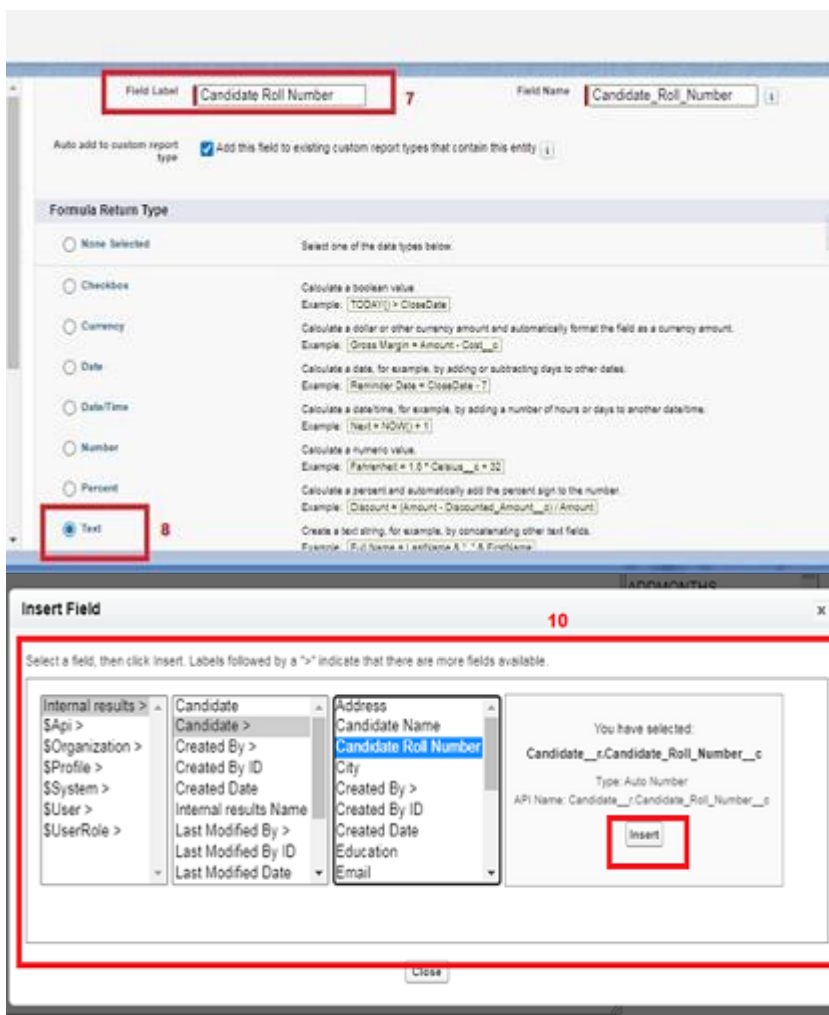
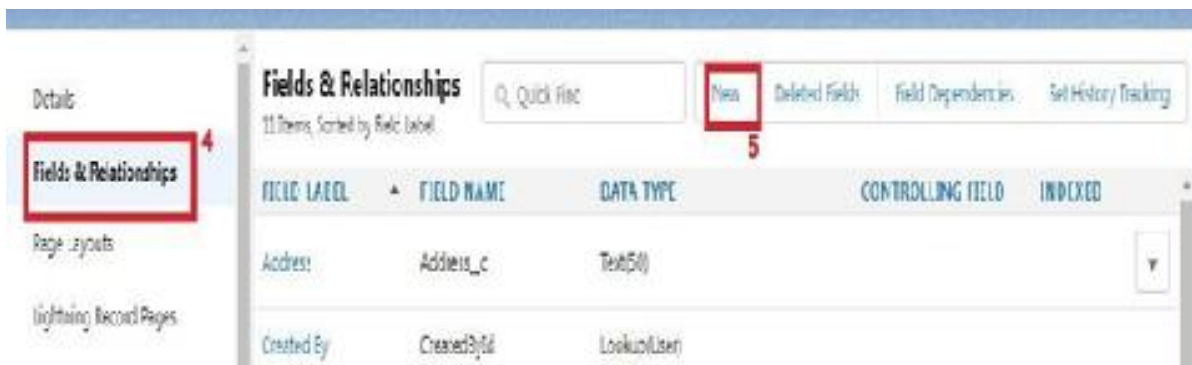
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next
6. For Field Label Duration, enter.
7. Give Help Text- Enter Course duration value in Years

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



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
- ☐ Formula
- ☐ Roll-Up Summary

Candidate

New Custom Field

Step 2. Enter the details

Field Label: Candidate Roll Number

Display Format: CAD-(000) Example: A-(0000) What is This?

Starting Number: 1

Field Name: Candidate_Roll_Number

Description:

Help Text:

Previous Next

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
 Alias
 Email
 Username
 Nickname [i](#)

Role 5
 User License
 Profile 6
 Active ☒
 Marketing User ☐
 Offline User ☐
 Knowledge User ☐
 Flow User ☐
 Service Cloud User ☐

Title
 Company
 Department

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

3 New User 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 Vanshiv Technologies App Launcher interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'Candidate Internal Result Card'. Below the search bar, a list of apps is shown, with 'Candidate Internal Result Card' highlighted. To the right of the app list, there is a 'Create' button. Below the app list, there is a section for 'Items' with a 'View All' link. The main content area is titled 'New Course Details'. It contains a form with two input fields: 'Course Name' (with the value 'MBA') and 'Duration' (with the value '2'). The 'Course Name' field is highlighted with a red box and a red number '5'. The 'Duration' field is also highlighted with a red box. To the right of the form, there is a section for 'Owner' with the text 'Vanshiv Technologies'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. 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 2

No results

View All

Home

Create

New Course Details

Information

* Course Name

MBA

Duration

2

Owner

Vanshiv Technologies

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. A red box highlights the App Launcher icon in the top left. Another red box highlights the search results for 'Candidate Internal Result Card' in the App Launcher. A third red box highlights the 'Course Details' tab in the navigation bar. A fourth red box highlights the 'BCA' course name in the list of course details.

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

