



IMPLEMENTING CRM FOR RESULTS TRACKING OF A CANDIDATE WITH INTERNAL MARKS USING SALESFORCE

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INTRODUCTION

Overview:

As a learner we should be able to create all base data including semester, candidate, course details and Lecturer details. Lecture should have the ability to create internal results.

PURPOSE:

Implementing CRM for the result tracking of a candidate with internal marks.

Data Model:

OBJECT NAME	FIELDS IN THE OBJECT	
Semester	Field Label	Data Type
	Semester Name	Text
	Course	Text
Candidate	Field Label	Data Type
	Candidate Name	Text
	Candidate ID	Text
	Semester Name	Text
	Internal Results	Text
Course Details	Field Label	Data Type
	Course Name	Text
	Course ID	Text
Lecturer Details	Field Label	Data Type
	Lecturer Role	Text
	Lecturer Name	Text
	Course ID	Text
	Course	Text
Internal Results	Field Label	Data Type
	Candidate ID	Text
	Course ID	Text
	Marks	Text

ACTIVITY AND SCREENSHOT:

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Username*
jane@company.sandbox

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Already have a Salesforce Developer Environment?
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1. Go to developers.salesforce.com/
2. Click on sign up
3. On the signup form, enter the following details:
 - First and Last name
 - Email
 - Company: Satyam college of engineering and technology
 - Country: India
 - Postal code: 629 401
 - User name: is the combination of NM ID and company.
 - Goto inbox of our email – click and verify account to active the salesforce developer account.

How to login to the salesforce account:

Salesforce Login: <https://login.salesforce.com/>

Go to salesforce.com and click on login

Enter the username and password that you just created

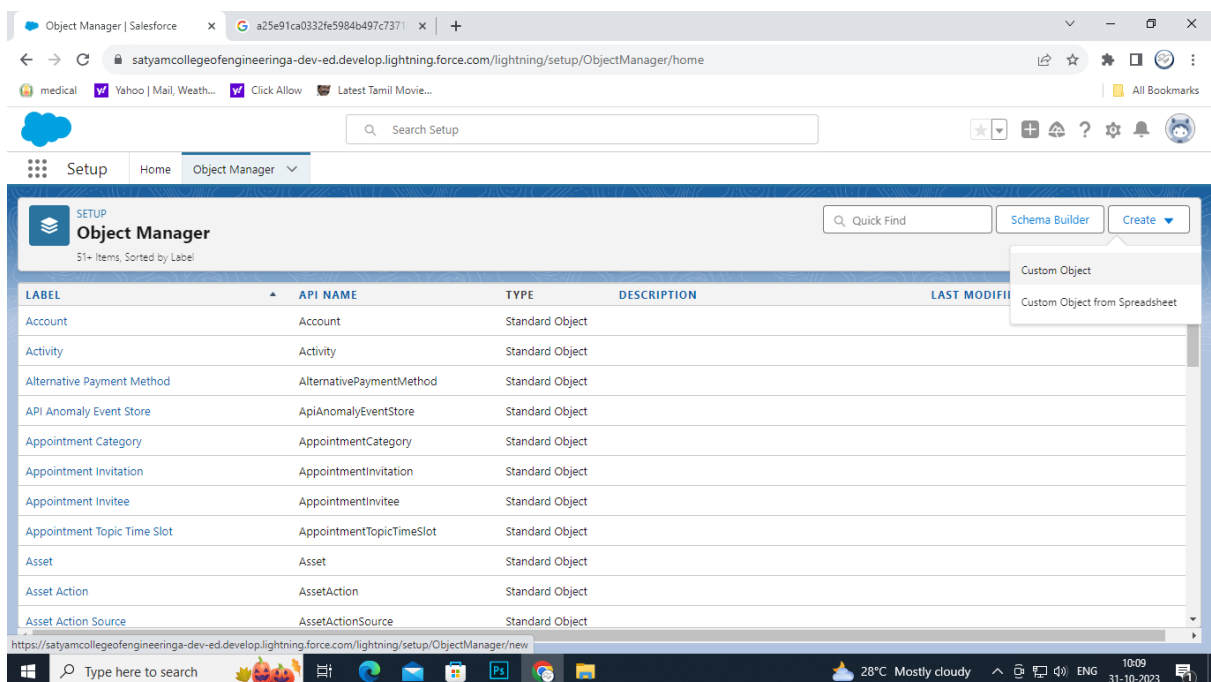
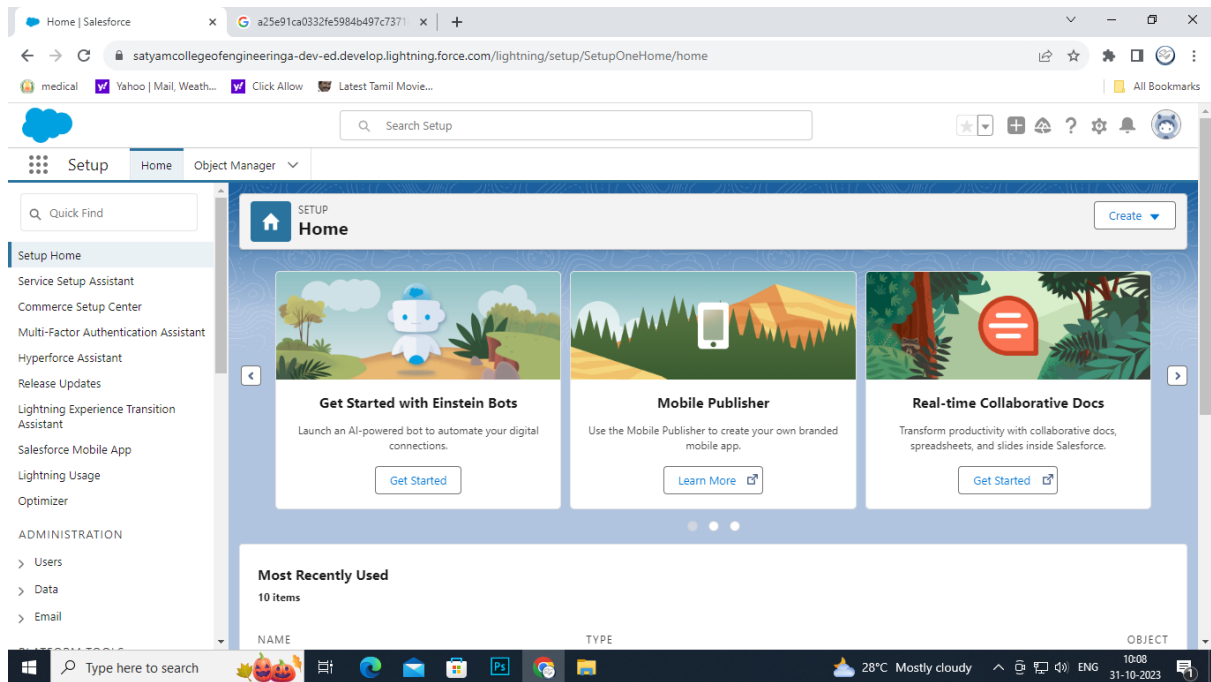
After login the Home page will be display

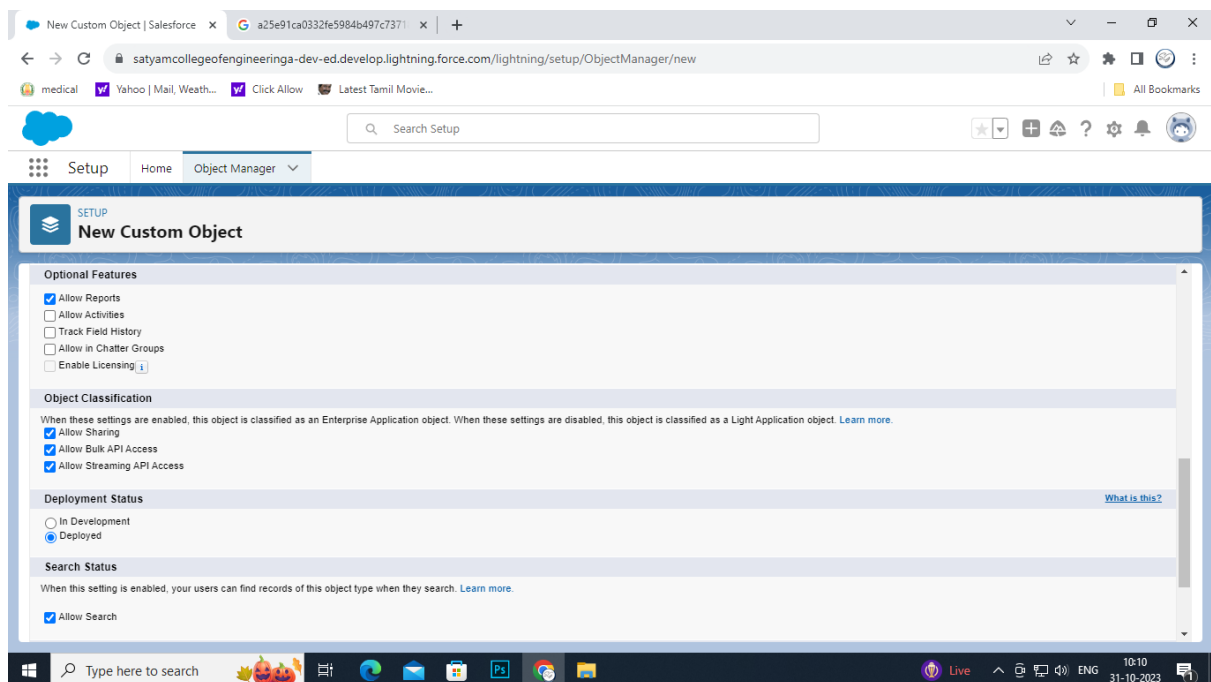
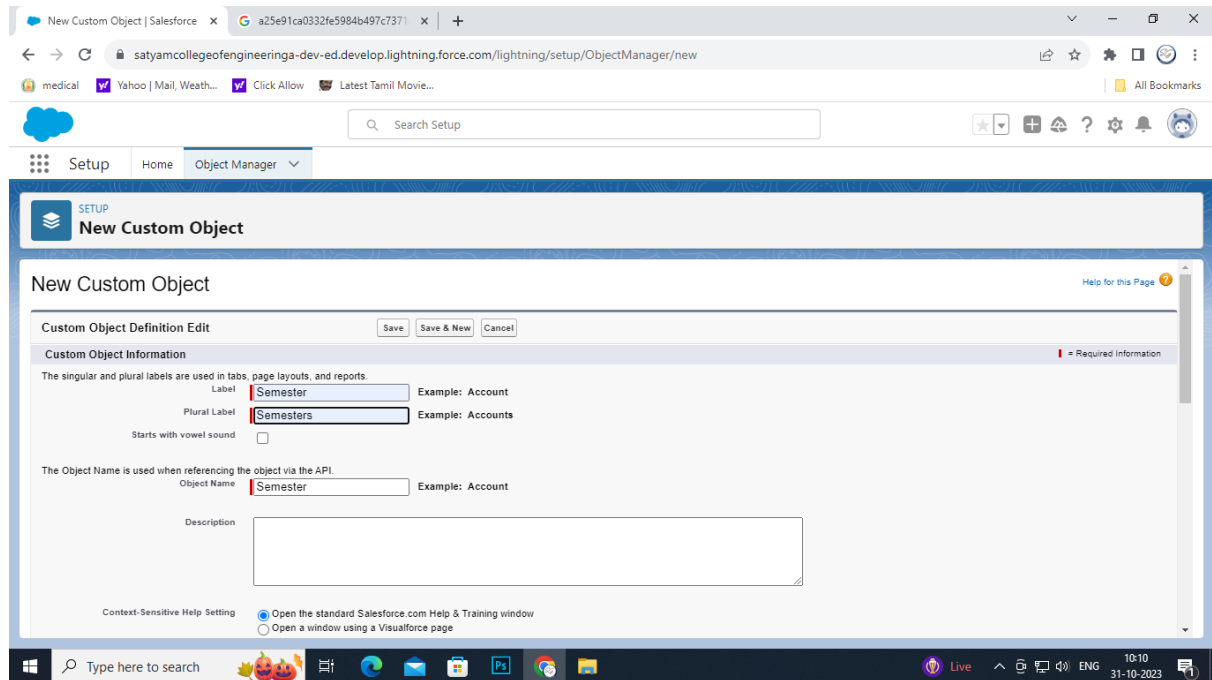
Salesforce objects are two types:

- Standard objects
- Custom objects

To create an object:

Creation of objects for Candidate Internal Result Card, For this app we need to create 5 object, there are (Semester, Candidate, Course details, Lecturer details and Internal results).





The following steps can be used for object creation.

- Click on the gear icon and then select setup.
- Click on the object manager tab
- Click create and select custom object.
- On the custom object page

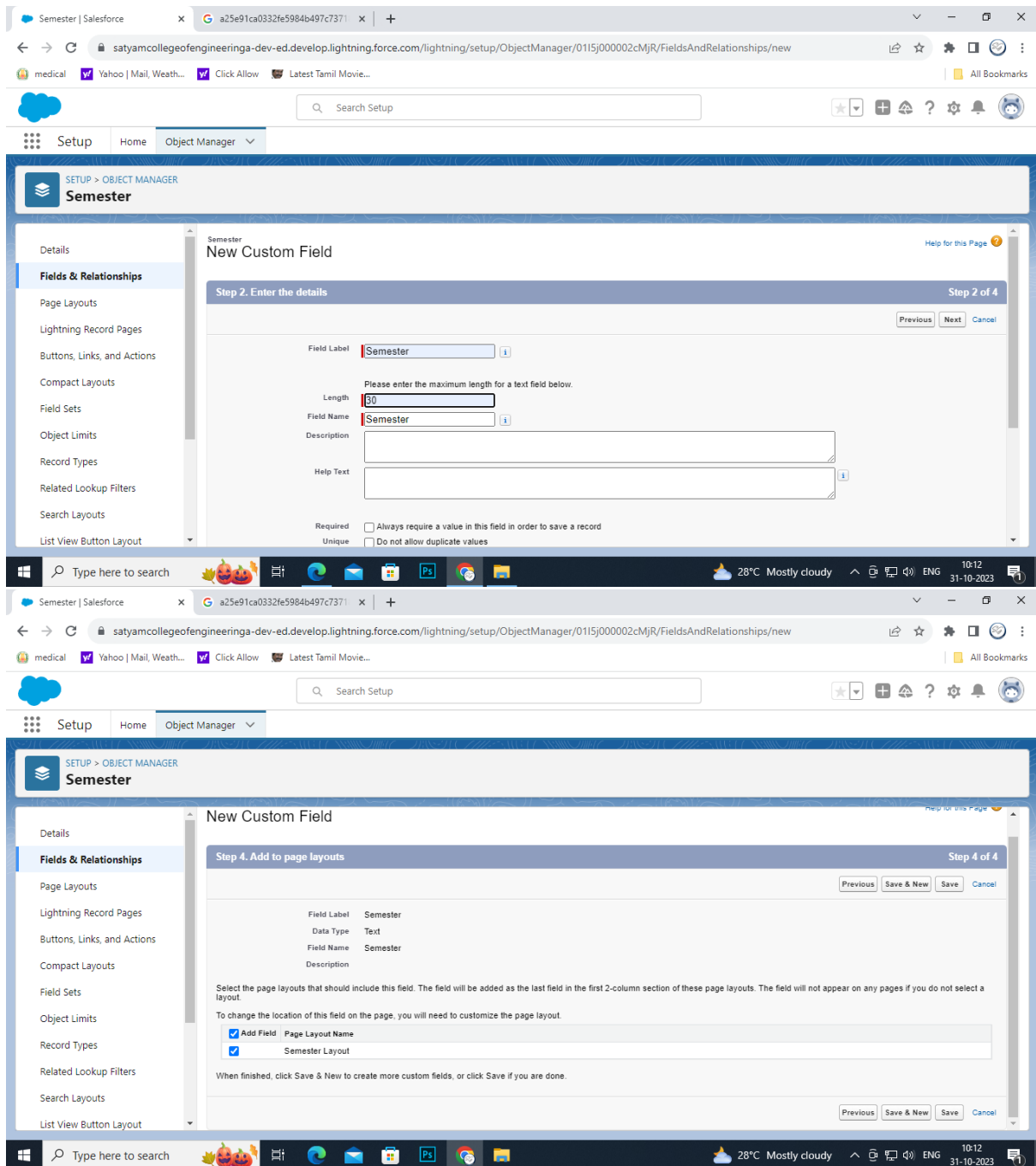
- Label: type Semester
- Plural Label: Semesters
- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click save.

Below screenshots for create field & Relationships

This screenshot shows the 'Fields & Relationships' page for the 'Semester' object in Salesforce. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists five fields: Created By, Last Modified By, Owner, Semester Name (with a dropdown arrow), and Semester Name (with a dropdown arrow). Above the table, there are tabs for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A 'Quick Find' search bar is also present.

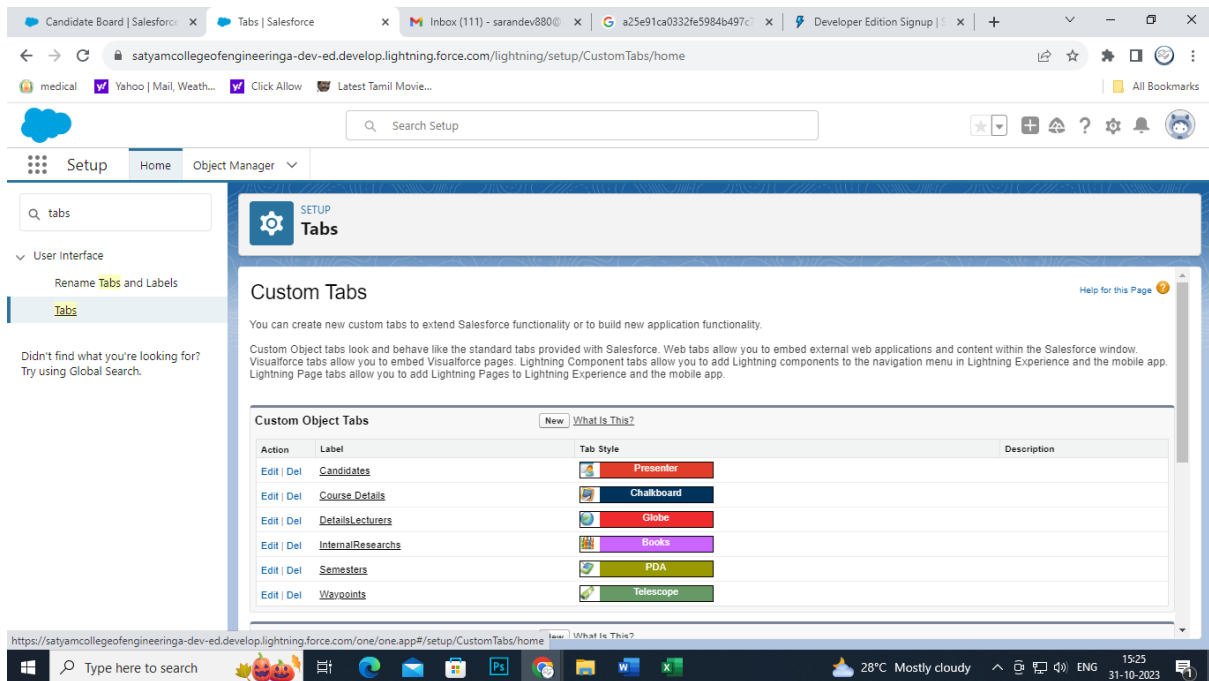
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_name__c	Text(30)		▼
Semester Name	Name	Text(80)		✓

This screenshot shows the 'Fields & Relationships' page for the 'Semester' object, specifically the 'New' field creation screen. The left sidebar is the same as the previous screenshot. The main content area is divided into two columns. The left column lists various field types with radio buttons: Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text (selected), Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. The right column provides detailed descriptions for each field type, explaining their capabilities and limitations. For example, the 'Text' field description states: 'Allows users to enter any combination of letters and numbers.' The 'Text Area' field description states: 'Allows users to enter up to 255 characters on separate lines.'



- Click the gear icon and select setup
- Click on object manager
- Type object name as Semester in search bar
- Click on the Semester object
- Click on Fields & Relationships
- Click New • Type the Field Name
- Go to Next, Next and Save

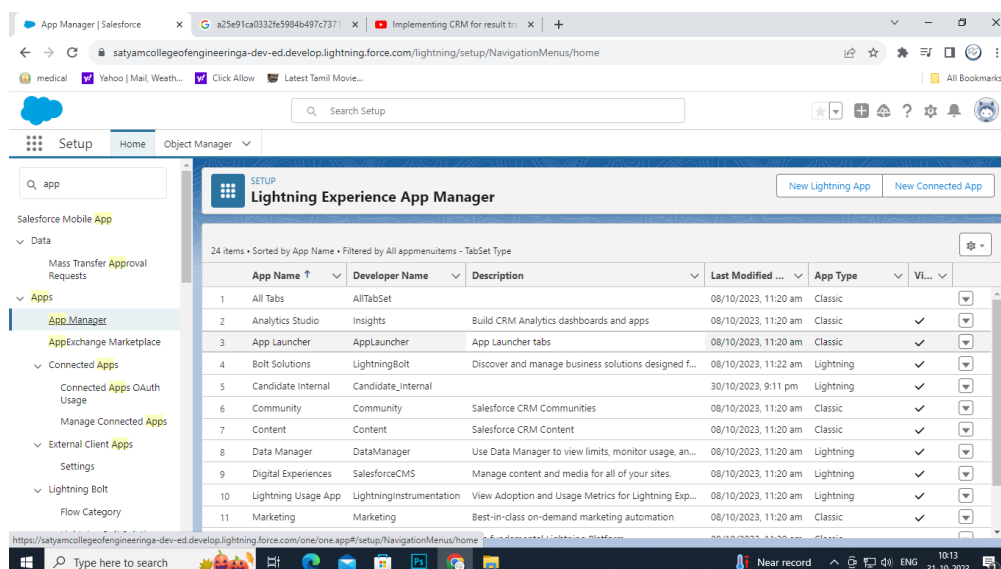
Next we have created a Custom Tab

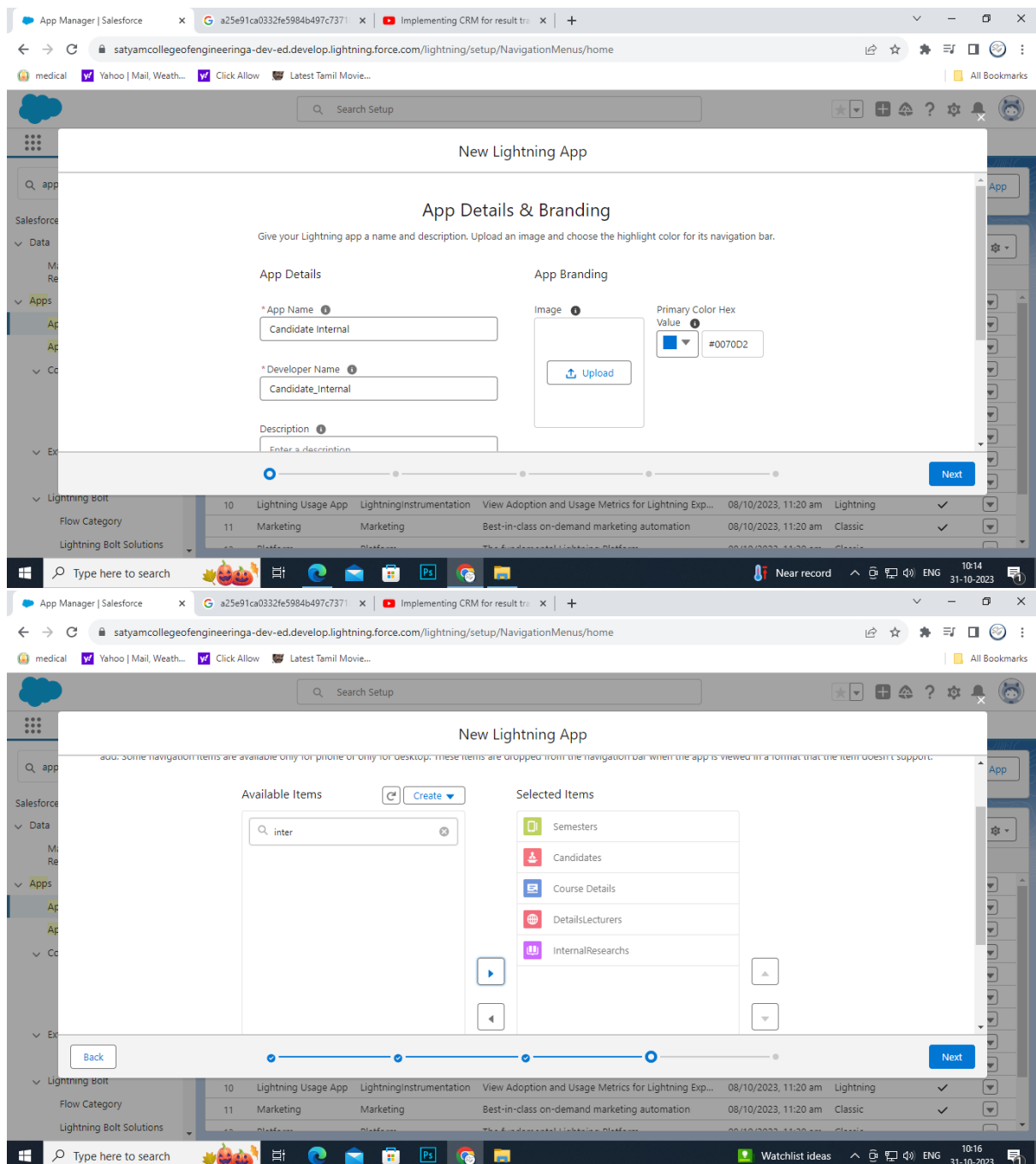


- Click the Home tab, type tabs in quick find and select Tabs
- Under Custom Object Tabs, Click New.
- For Object, select Semester.
- For Tab Style, select any icon
- Leave all defaults as is.

Click Next, Next and Save.

Lighting App Creation:





- Go to Setup, type App Manager in the Quick Find and select App Manager.
- Click New Lightning Name and 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, Le Details, Internal Results 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 the changes go to App Manager and select the Candidate Internal Result Card app. Go to Setup, type App Manager in the Quick Find and select App Manager. Click New Lightning App. Type Candidate Internal Result Card as the App Name and then click Next. Under App options, leave the default selections and click Next, leave as is and click Next. Under available items, select Semester, Candidate, Course Details, Le Details, Internal Results 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 the changes go to App launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.

Creating a Users:

The screenshot displays the Salesforce 'New User' setup page. The 'User Edit' form is visible, showing the following details:

- General Information:**
 - First Name: Saran
 - Last Name: Dev
 - Alias: sdev
 - Email: sarandev880@gmail.com
 - Username: sarandev880@gmail.com
 - Nickname: User1698727434361952570
 - Title:
 - Company:
 - Department:
 - Division:
- Role:**
 - Role: <None Specified>
 - User License: Salesforce
 - Profile: System Administrator
 - Active: ☒
 - Marketing User: ☐
 - Offline User: ☐
 - Knowledge User: ☐
 - Flow User: ☐
 - Service Cloud User: ☐
 - Site.com Contributor User: ☐
 - Site.com Publisher User: ☐
 - WDC User: ☐
 - Data.com User Type: None...

The left sidebar shows the 'Setup' menu with 'Users' selected. The top navigation bar shows 'Setup', 'Home', and 'Object Manager'. The bottom status bar shows the date and time as 10:18 on 31-10-2023.

- From Setup, in the Quick Find box, type Users and then select Users.
- Click New User
- Enter User's Name and email address and unique username in email address.
- Select a Role (none)
- Select a User Licence as salesforce
- Select a profile as salesforce

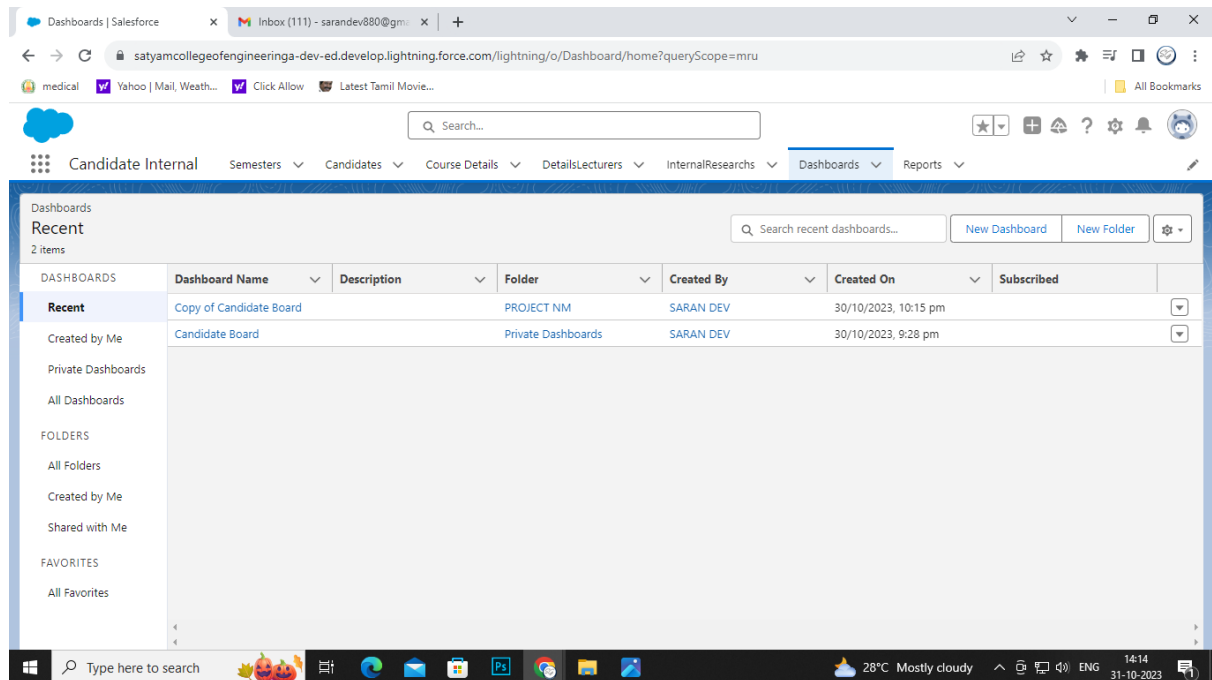
Reports:

The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes 'Candidate Internal', 'Semesters', 'Candidates', 'Course Details', 'DetailsLecturers', 'InternalResearchs', 'Dashboards', and 'Reports'. The 'Reports' tab is selected, and a 'New Candidates Report' is being created. The report is categorized under 'Candidates'. The 'Columns' section shows 'Candidate: Candidate Name' selected. The 'Groups' section shows 'GROUP ROWS' selected. The 'Run' button is visible in the top right corner. The report preview shows a table with 4 rows of candidate names: 1. Saran, 2. Seetha Lekshmi, 3. Revathi, 4. Sofia.

	Candidate: Candidate Name
1	Saran
2	Seetha Lekshmi
3	Revathi
4	Sofia

- Go to the app
- Click on the Reports tab
- Select the report type from the category (Candidate)
- Click on start report
- Customize your report, then save or run it
- Type the Report name as Candidate with Candidate Marks
- The Report page display, click Save & Run Click on the Reports tab, click New Report Select the report type from the category (Candidate) Customize your report, then save or run it name as Candidate with Candidate Marks, click save

Dashboard:



- Create the Dashboards tab
- Click the Dashboard tab
- Click New Dashboard
- Name the Dashboard as candidate Board. Leave all other field as is and click create
- Click + Component
 - For Report, select Candidate with Candidate Marks, Click Select
 - For Display as, select any chart and click Add
- Click Save
- Click Done

Advantages and Disadvantages:

Advantages:

- It is used to tracking the internal result of the students.

Disadvantages:

- If manual error occurs during the feeding of data it is difficult to be altered.

Applications:

- It can be used to track the internal mark of the students.
- It can be tracked anywhere through online mode.

Conclusion:

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

Thank You