

# Implementing CRM For Result Tracking

## Of A Candidate With Internal Marks - (ADMIN)

1. Creating a developer org in salesforce.

- Go to [developers.salesforce.com/Signup](https://developers.salesforce.com/Signup)
- Click on sign up.
- On the sign-up form, enter the following details:
- First name - Nimitha , Last name - Pathiputtur
- Email – pnimitha871@gmail.com
- Role: Developer
- Company: Gayatri Degree College - Tirupati
- County: India
- Postal Code: 517501
- Username: [pnimitha@gdctirupati.com](mailto:pnimitha@gdctirupati.com)
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## Creation Of Semester Object For Candidate Internal Result Card

- 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 ➤ Check the Allow Search ➤ 10. Click Save.

# Creation Of Semester Tab For Candidate Internal Result Card

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
- In the same way create Tabs for all Custom Objects -Candidate, Course Details, Lecturer Details, Internal results

## 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, Lecturer Details, Internalresults, Reports, and Dashboards** and move them to Selected Items.
- 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.

Now Let's create a Lookup field on candidate object

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select candidate.
- Select Fields & Relationships from the left navigation ➤ Click New
- Select the lookup as the Data Type, then click Next.
- In related select Semester
- For Field Label Semester Name, enter.
- Click Next, Next, then Save & New.

## **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

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

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

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Internal results.
- Select Fields & Relationships from the left navigation.
- Click New
- Select the Formula as the Data Type, then click Next.
- Give field label Candidate Roll Number
- Select formula return type text, Click Next
- 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

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Candidate.
- Select Fields & Relationships from the left navigation ➤ Click New
- Select the Auto Number as the Data Type, then click Next.
- For Field Label Candidate enter Roll Number.
- Give a display format
- Click Next, Next, then Save & New.

## Creating A User

- From Setup, in the Quick Find box, enter Users.
- Select Users.
- Click New User.
- 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.
- 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. ➤ Select a profile as Standard user.
- Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

## Create Record (Course Details)

Create Records on Course Details Objects

- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card App & click on it.
- Click on Course Details tab.
- Click new button
- Fill all Course Details record details.
- Click on Save Button.

## View Record (Course Details)

Viewing the Records of Course Detail Object

- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card & click on it.
- Click on Course details Tab.
- Click on any record name. you can see the details of the Driver

## **Delete Record (Course Details)**

Deleting Records of Course Details Object

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

## **Create Report**

- Click App Launcher
- Select Candidate Internal Result Card App ➤ Click reports tab
- Click New Report.
- Click the report type as Semesters with Course Click Start report.
- Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a Matrix Report).
- Click refresh
- Click save and run
- Give report name – Candidate Internal Result Report
- Click Save

- On the report builder page, locate the "Fields" pane on the left-hand side.
- Find the field for which you want to create a bucket field and drag it to the report preview section.
- Click on the field in the report preview to open the field properties.
- In the field properties, locate the "Summarize" option and click the drop-down arrow.

- Select "Bucket Field" from the available options.
- In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.
- Click "OK" or "Apply" to save the bucket field settings.
- Customize the report layout and add any additional fields or filters as needed.
- Once you are satisfied with the report setup, click "Save" to save the report.

## **View Report**

- Click on App Launcher on left side of screen.
- Search Candidate Internal Result Card App & click on it.
- Click on Reports Tab.
- Click on Candidate Internal Result Report and see records.

## **Create Dashboard**

- Click on Dashboards tab from the Candidate Internal Result Card application.
- Click on new dashboard.
- Give name- Candidate Internal Result Card
- Click create
- Give your dashboard a name and click on +component
- Select the Candidate Internal Result Report which you created.
- For the data visualization select any of the chart, table etc. as per your choice/requirement.
- Click add.
- Click save.

## **View Dashboard**

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