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

Team ID : LTVIP2023TMID11614

Team Size : 01

Team Leader : S SURENDRA

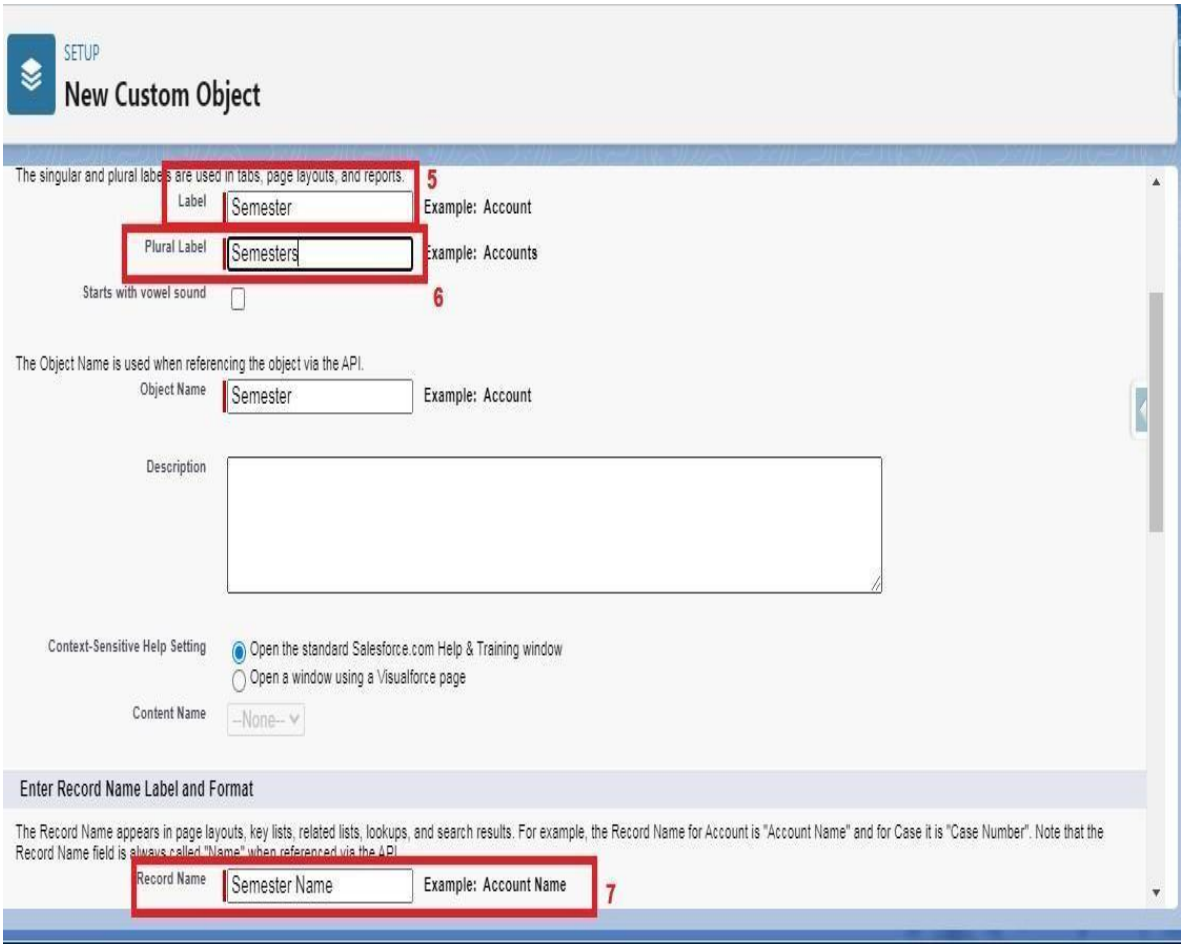
The project aim is to provide real time knowledge for all the students who have basic knowledge of a salesforce and looking for real-time project . this project will also help those professionals who are in cross technology and want to switch to salesforce with the help of this project they will gain knowledge and can included it into their resume as well

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 Dropdownclick 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.

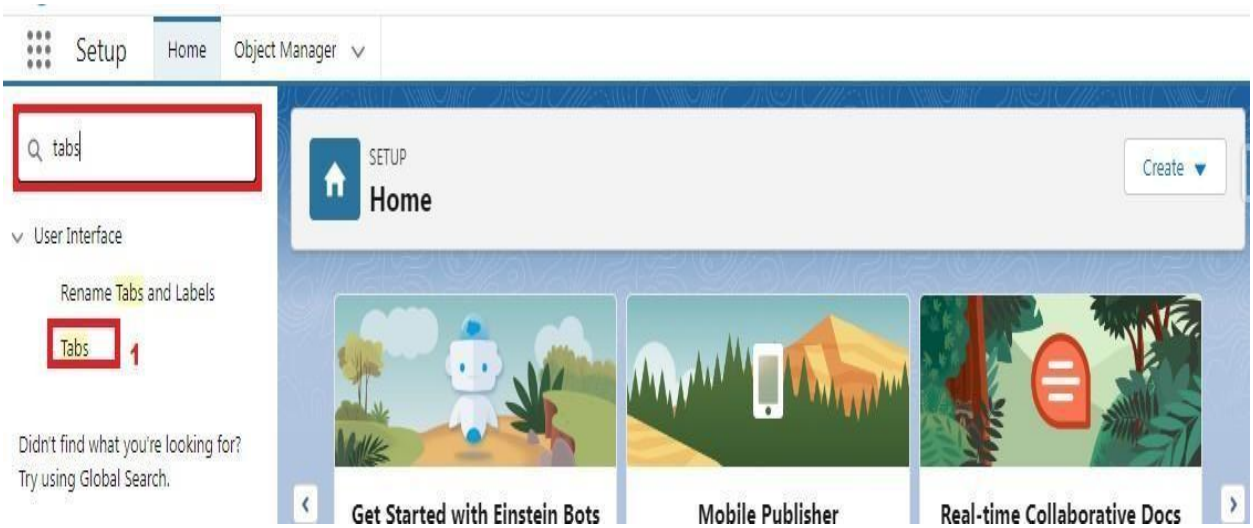
In the same way create **4** more objects as **Candidate**, **Course Details**, **Lecturer Details** and **Internal results**.

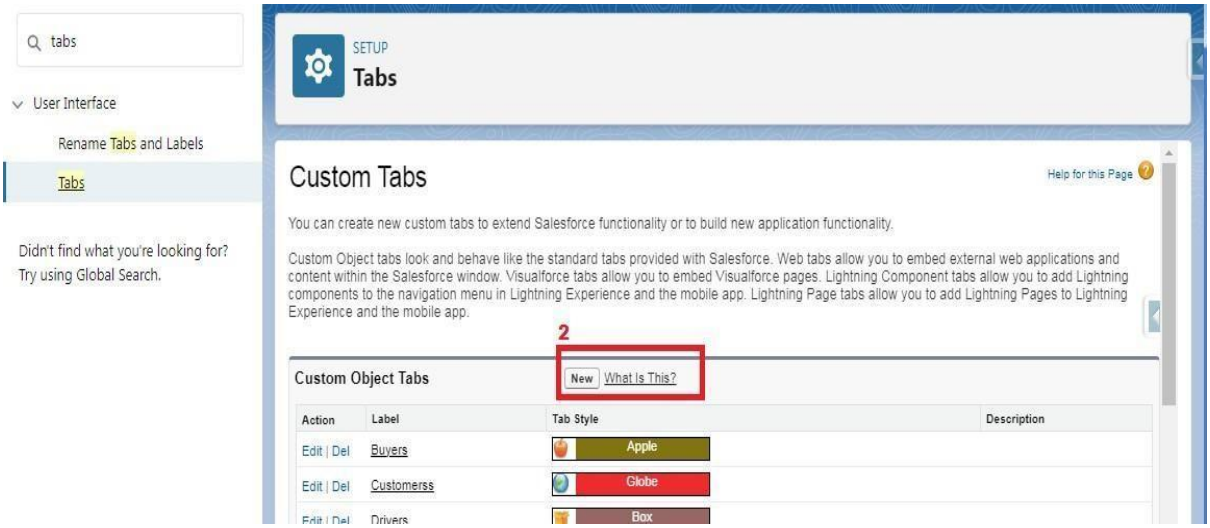

SETUP
New Custom Object
The singular and plural labels are used in tabs, page layouts, and reports.
5
Label
Semester
Example: Account
Plural Label
Semesters
Example: Accounts
Starts with vowel sound
6
The Object Name is used when referencing the object via the API.
Object Name
Semester
Example: Account
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

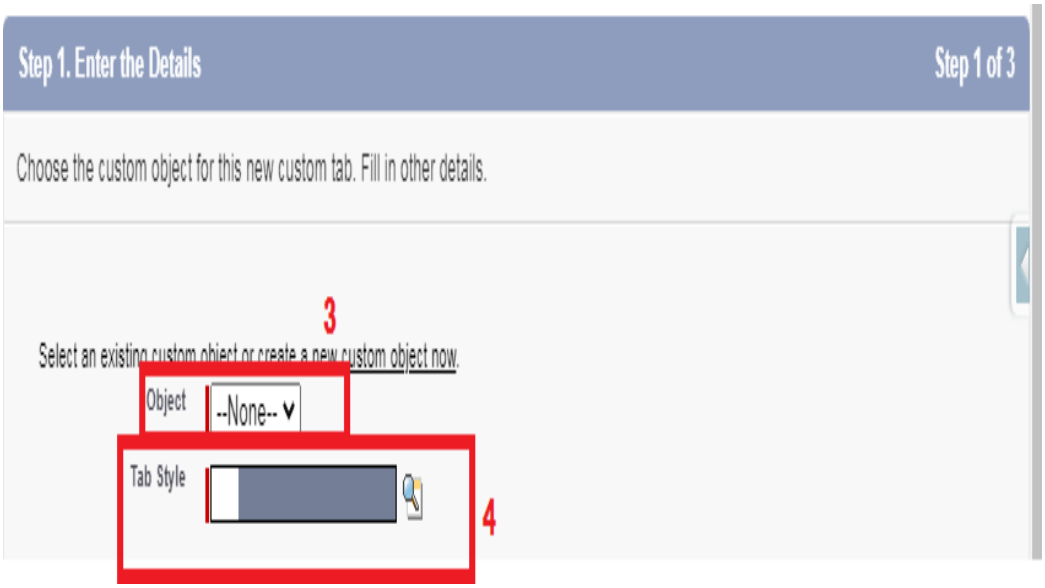
Creation Of Semester Tab For Candidate Internal Result Card

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Semester.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects -Candidate, Course Details, Lecturer Details, Internal results .



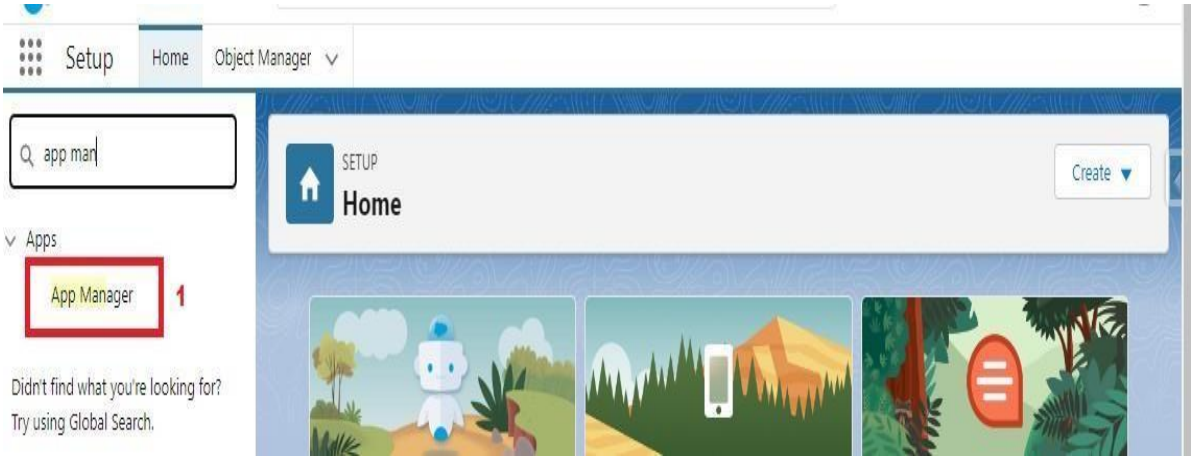


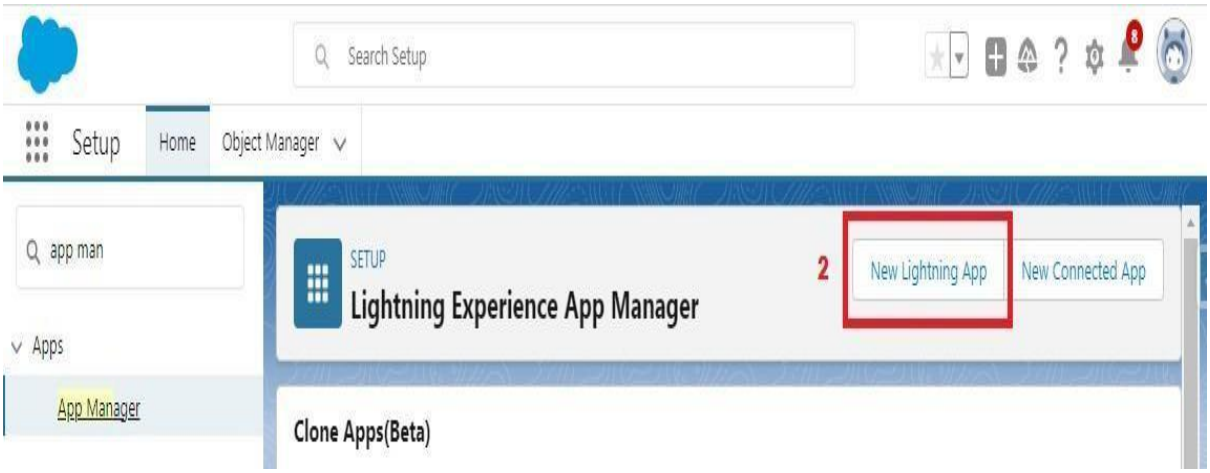


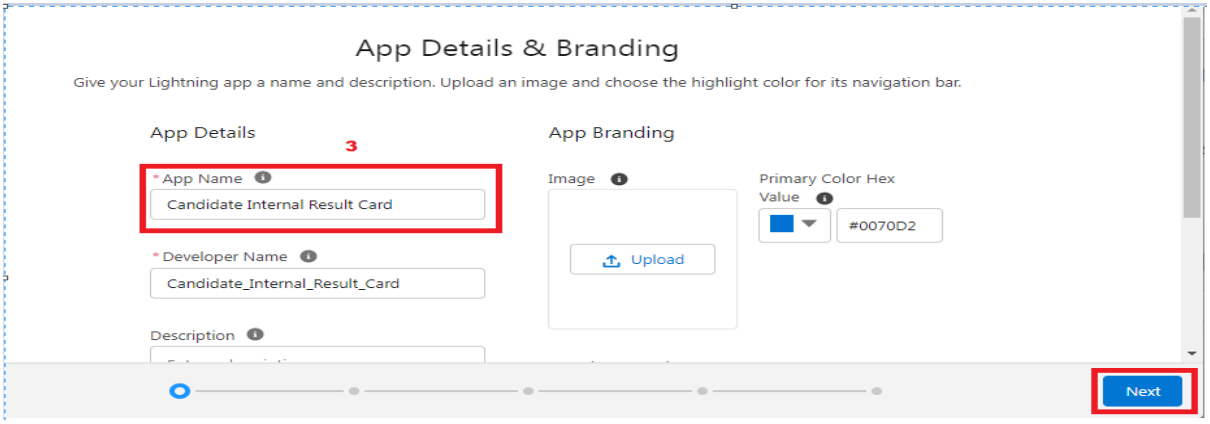
Create The Candidate Internal Result Card App

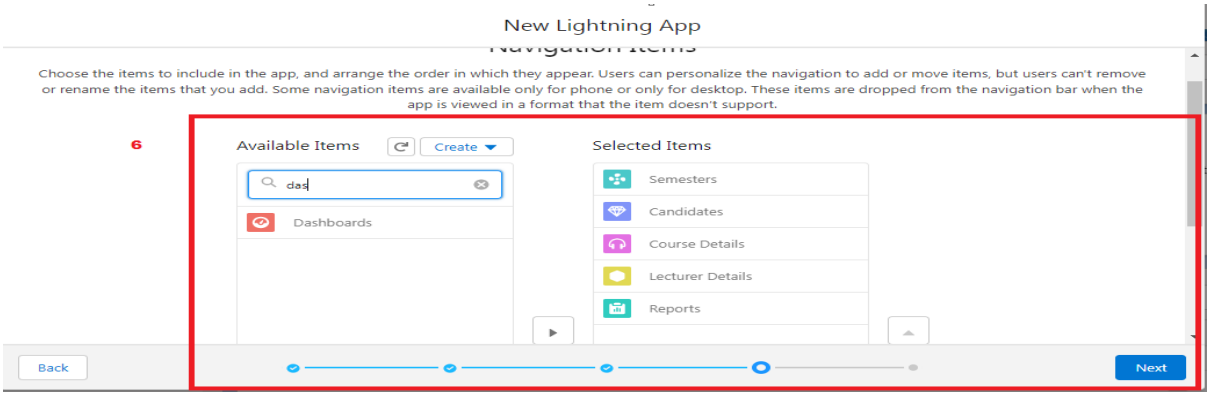
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter **Candidate Internal Result Card** as the App Name, then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.
6. 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.



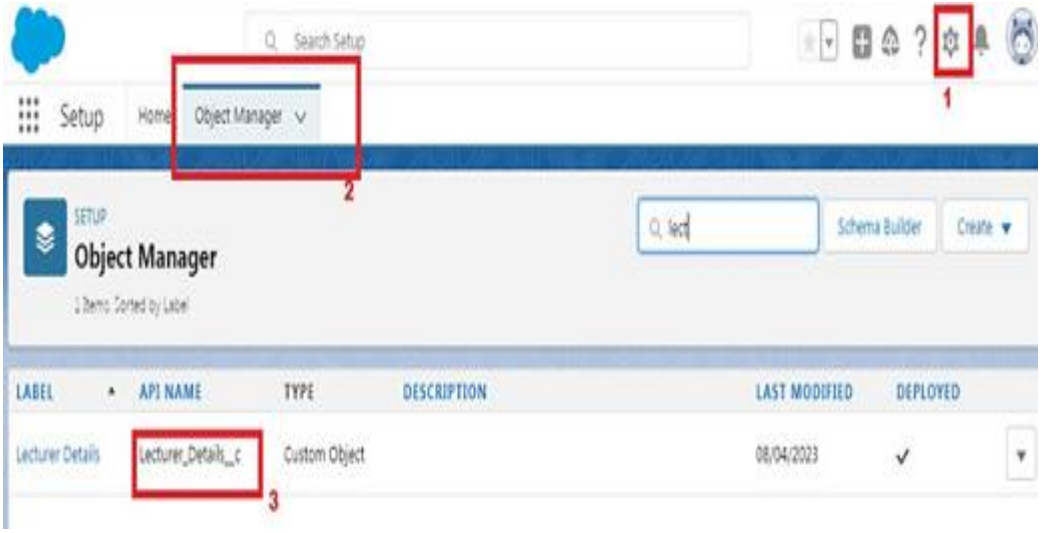

Search Setup
Setup
Home
Object Manager
app man
Apps
App Manager
SETUP
Lightning Experience App Manager
2
New Lightning App
New Connected App
Clone Apps(Beta)

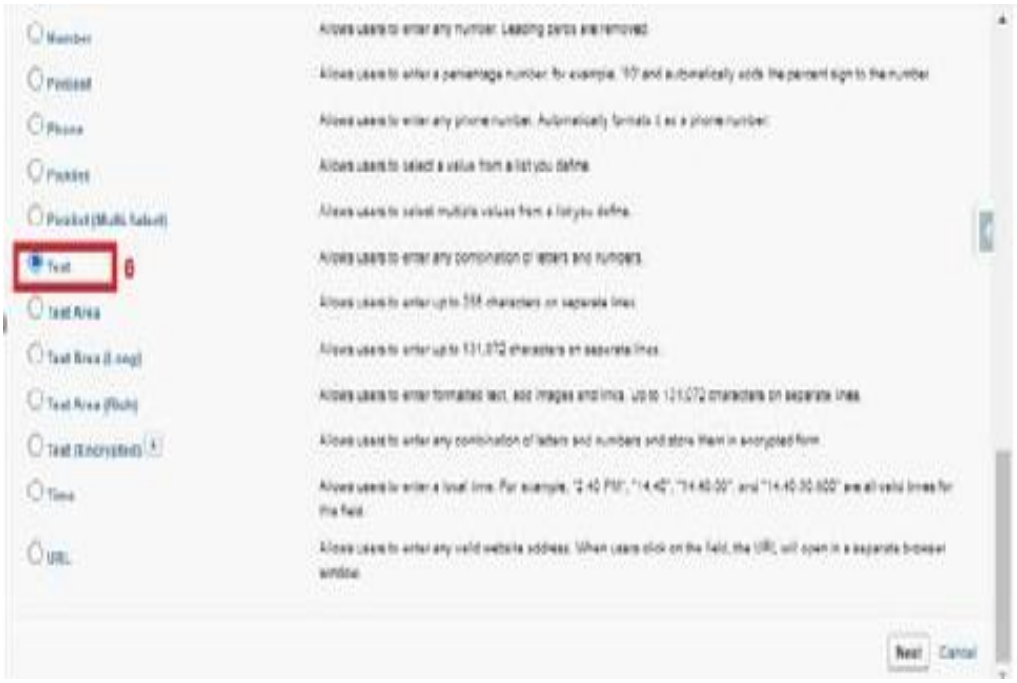

App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
3
* App Name
Candidate Internal Result Card
* Developer Name
Candidate_Internal_Result_Card
Description
App Branding
Image
Upload
Primary Color Hex Value
#0070D2
Next

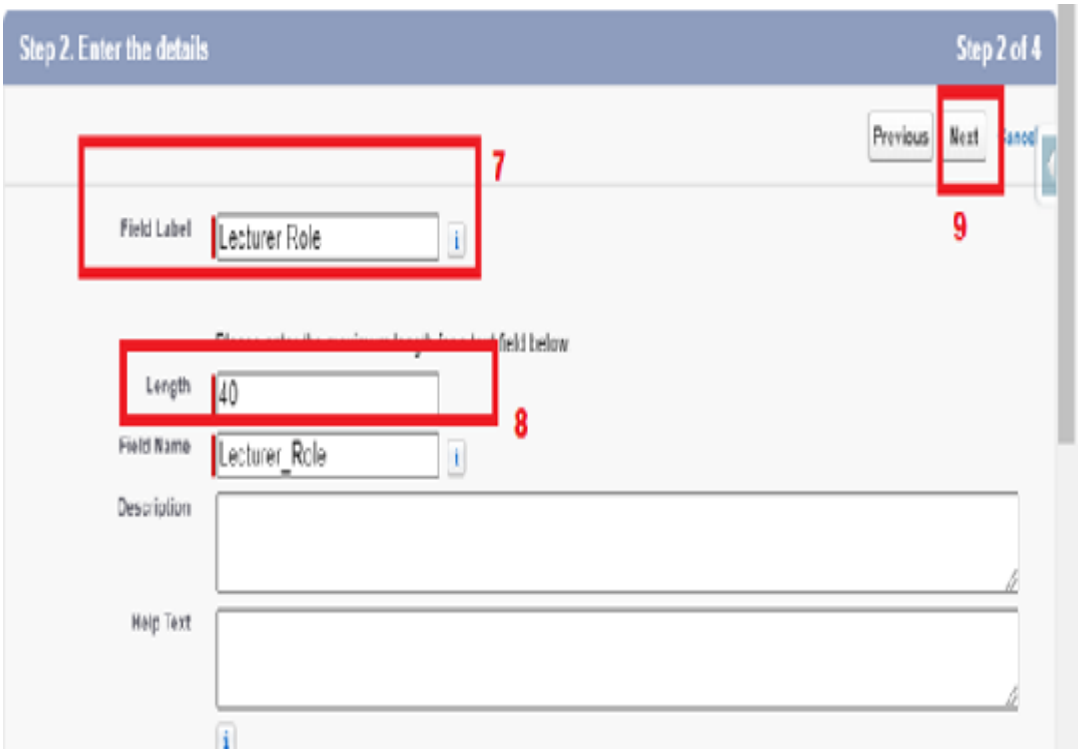

New Lightning App
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
6
Available Items
Create
das
Dashboards
Selected Items
Semesters
Candidates
Course Details
Lecturer Details
Reports
Back
Next

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.

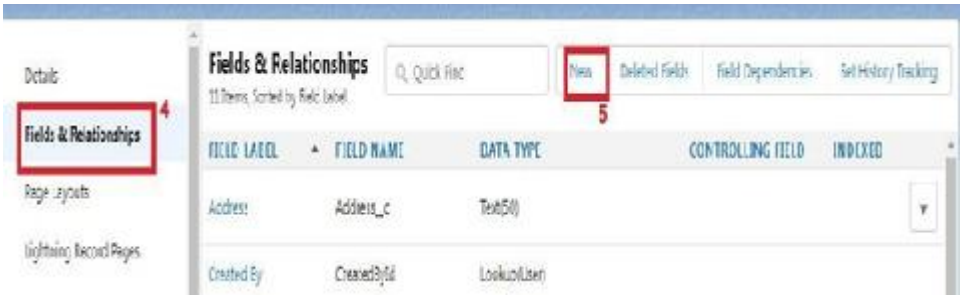


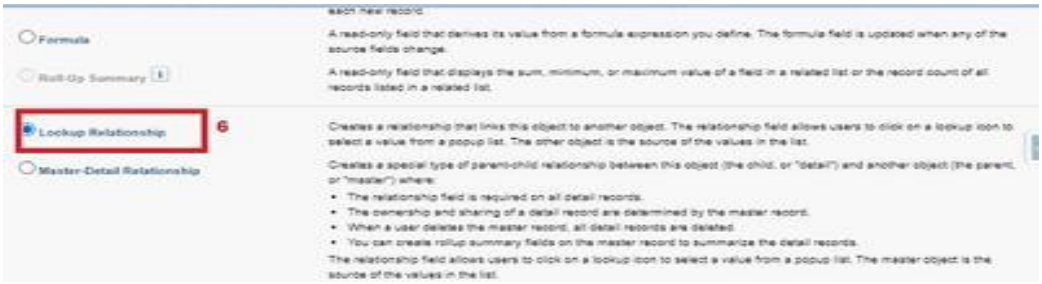

Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
6
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL
Next
Cancel

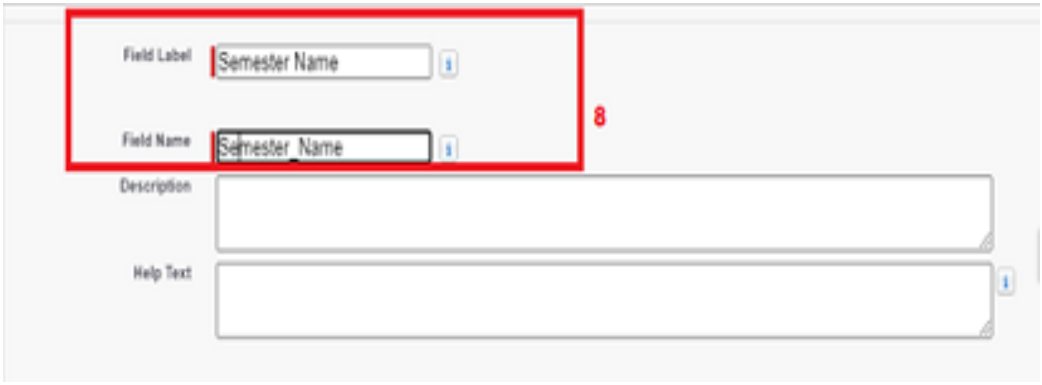

Step 2. Enter the details
Step 2 of 4
Previous
Next
9
7
Field Label
Lecturer Role
Length
40
8
Field Name
Lecturer_Role
Description
Help Text

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 & New.



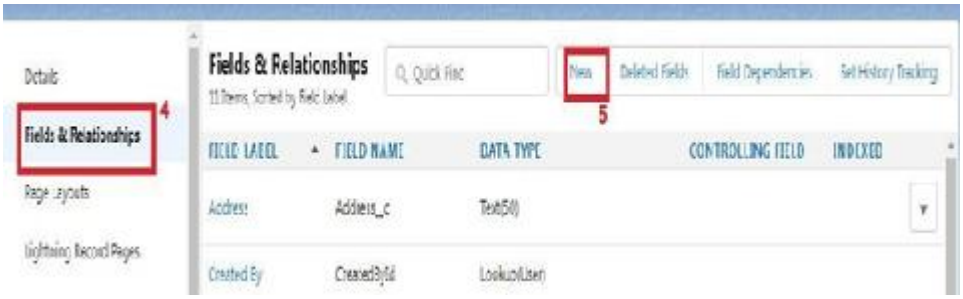


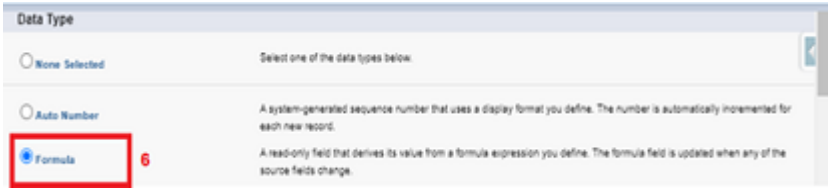


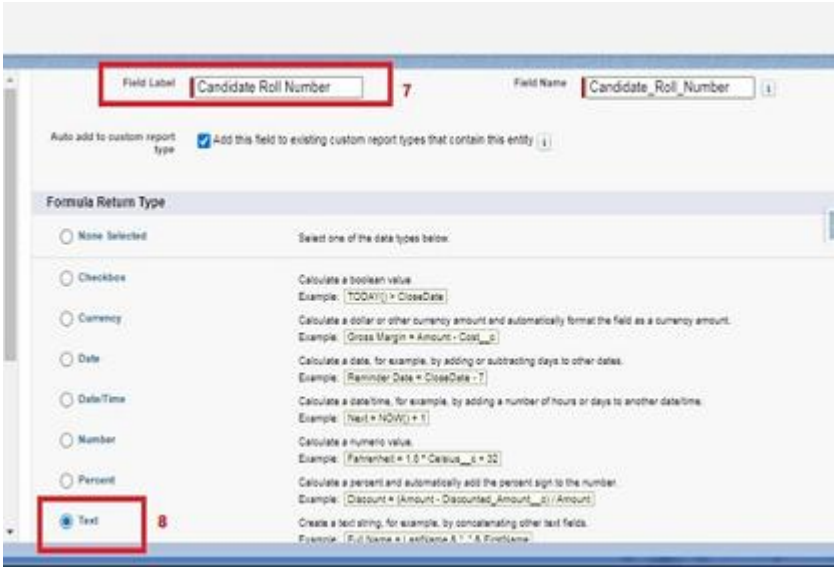
Note- Similarly create all lookup fields on their respective objects.

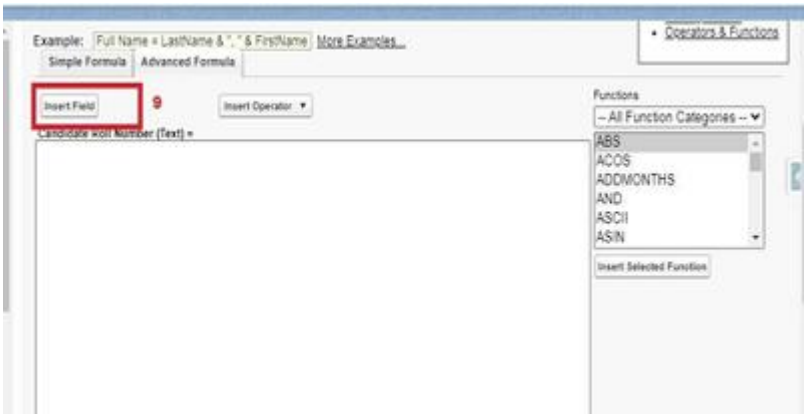
Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

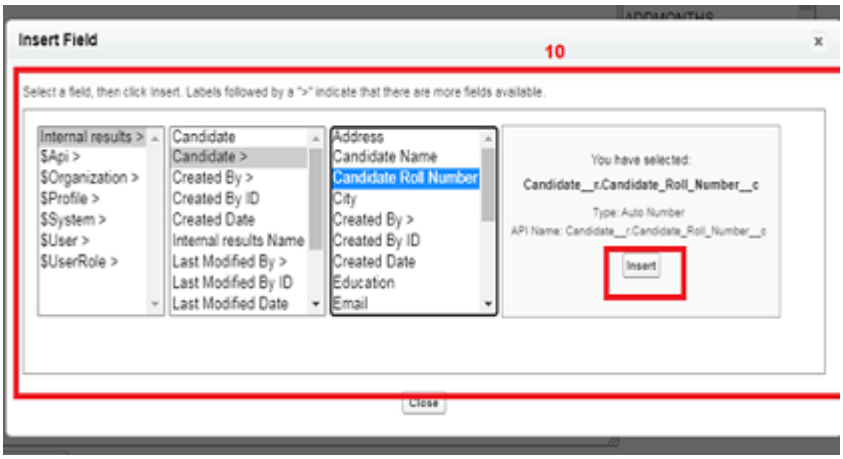
Let’s create a Number field on Course Details object
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next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



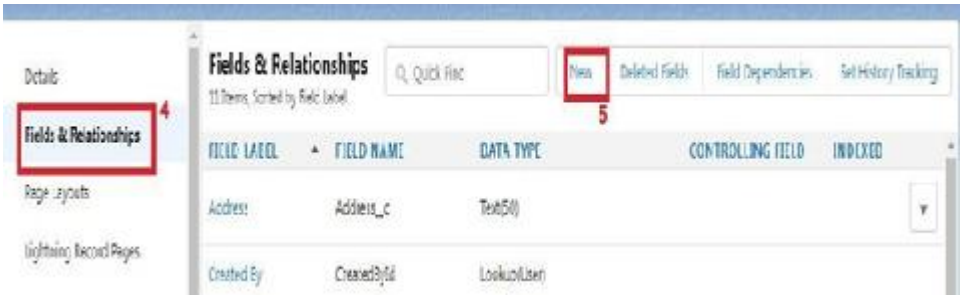


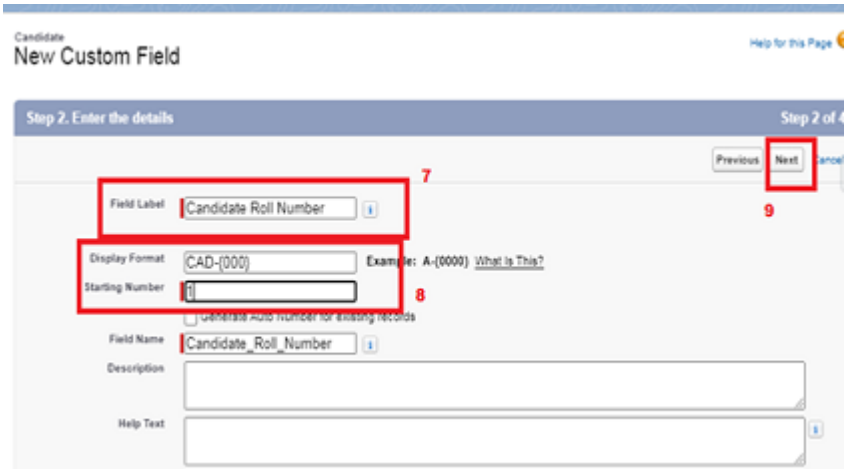

Field Label
Candidate Roll Number
7
Field Name
Candidate_Roll_Number
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value.
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
8
Create a text string, for example, by concatenating other text fields.


Example: Full Name = LastName & ", " & FirstName
More Examples...
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
9
Insert Operator
Candidate Roll Number (Text) =
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function


Insert Field
10
Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.
Internal results >
$Api >
$Organization >
$Profile >
$System >
$User >
$UserRole >
Candidate
Candidate >
Created By >
Created By ID
Created Date
Internal results Name
Last Modified By >
Last Modified By ID
Last Modified Date
Address
Candidate Name
Candidate Roll Number
City
Created By >
Created By ID
Created Date
Education
Email
You have selected:
Candidate__r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c
Insert
Close

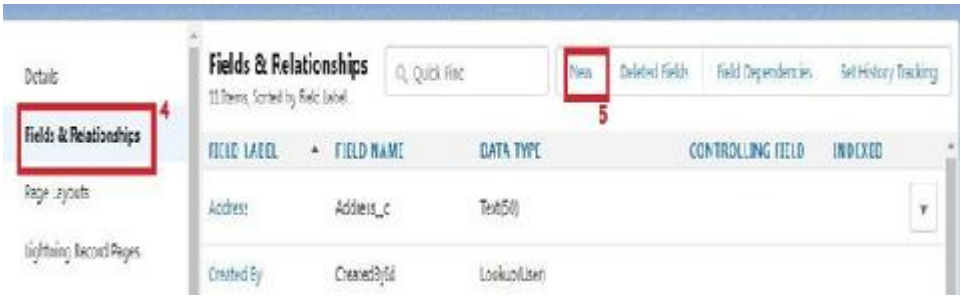
Now Let’s create an auto number field on Candidate object
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate enter Roll Number.
8. Give a display format
9. Click Next, Next, then Save & New.

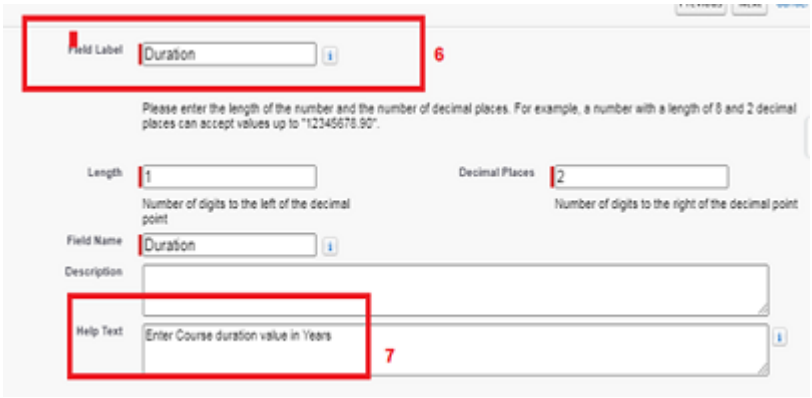



Candidate
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
7
Field Label
Candidate Roll Number
9
Display Format
CAD-(000)
Example: A-(0000) What is This?
Starting Number
1
8
Generate Auto Number for existing records
Field Name
Candidate_Roll_Number
Description
Help Text

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

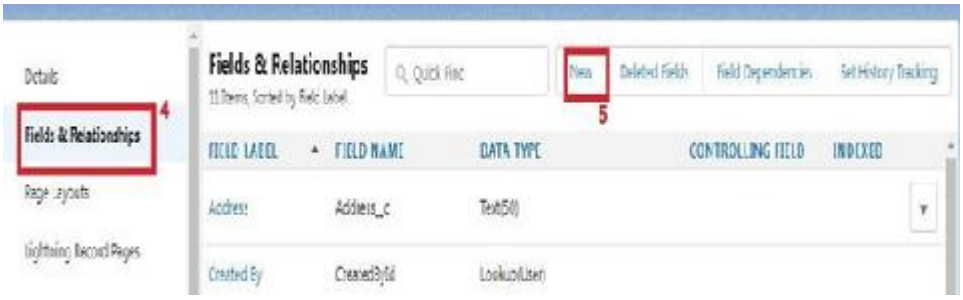
Let’s create a Number field on Course Details object
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next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

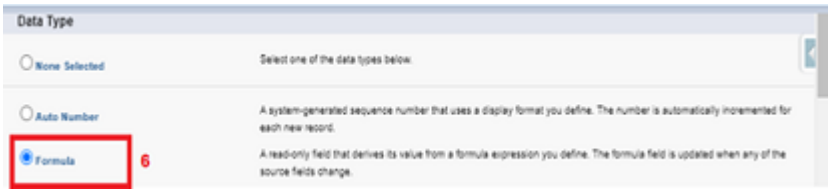


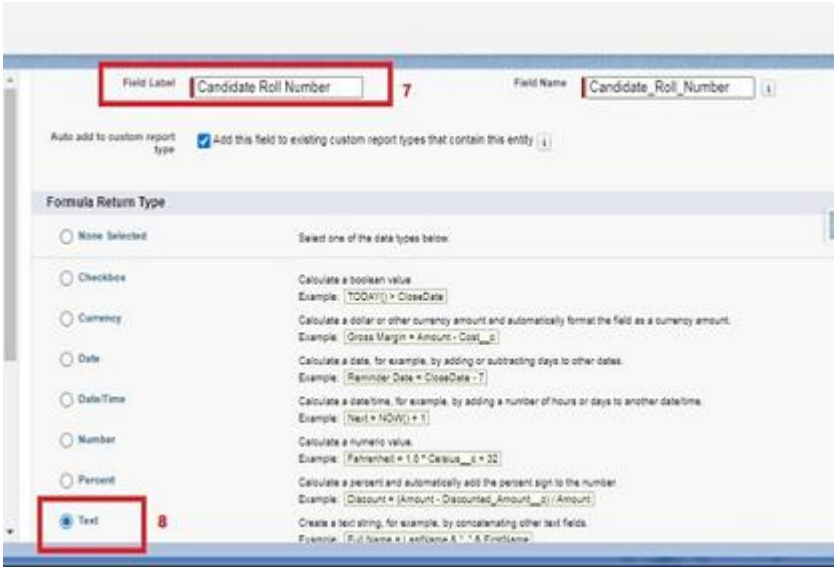


Now Let’s create a Formula field on Internal Results object

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.




Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
6
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.


Field Label
Candidate Roll Number
7
Field Name
Candidate_Roll_Number
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value.
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
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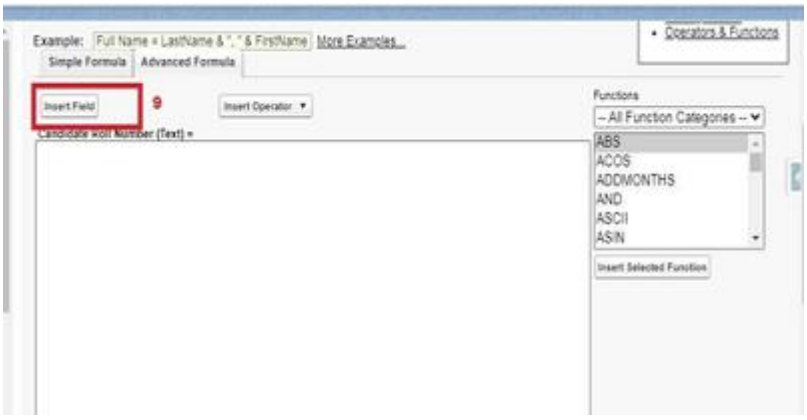
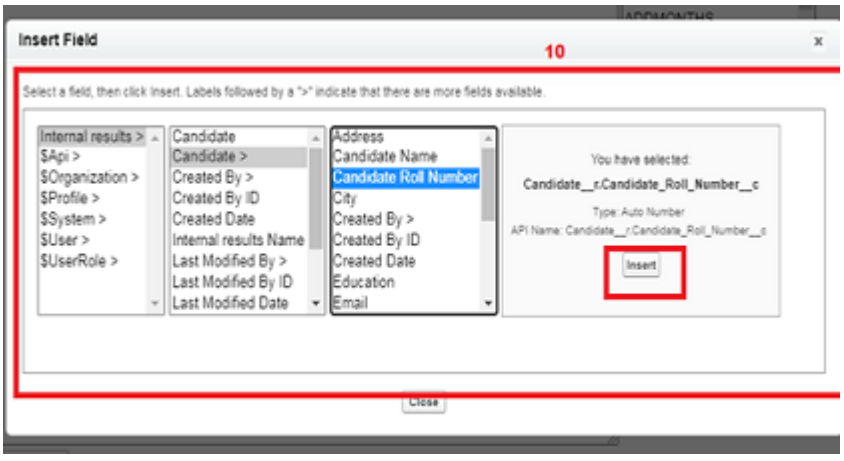
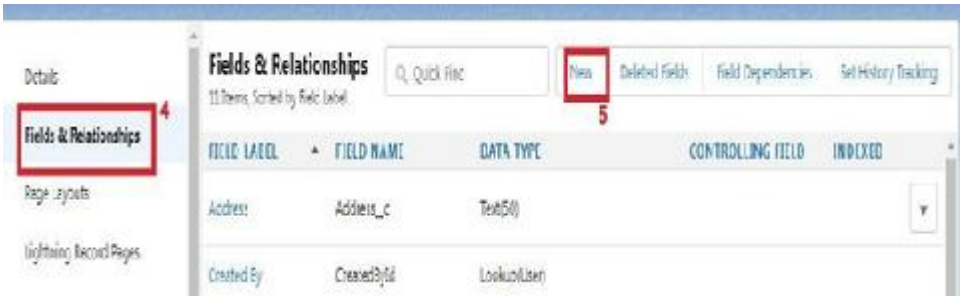
Create a text string, for example, by concatenating other text fields.

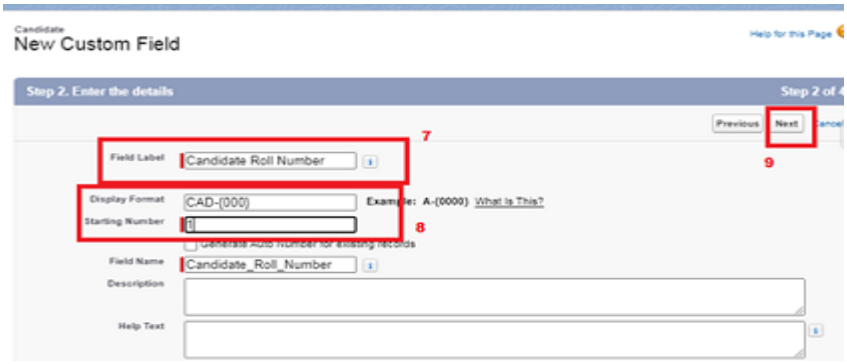

Example: Full Name = LastName & ", " & FirstName
More Examples...
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
9
Insert Operator
Candidate Roll Number (Text) =
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function


Insert Field
10
Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.
Internal results >
$Api >
$Organization >
$Profile >
$System >
$User >
$UserRole >
Candidate
Candidate >
Created By >
Created By ID
Created Date
Internal results Name
Last Modified By >
Last Modified By ID
Last Modified Date
Address
Candidate Name
Candidate Roll Number
City
Created By >
Created By ID
Created Date
Education
Email
You have selected:
Candidate__r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c
Insert
Close

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 & 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
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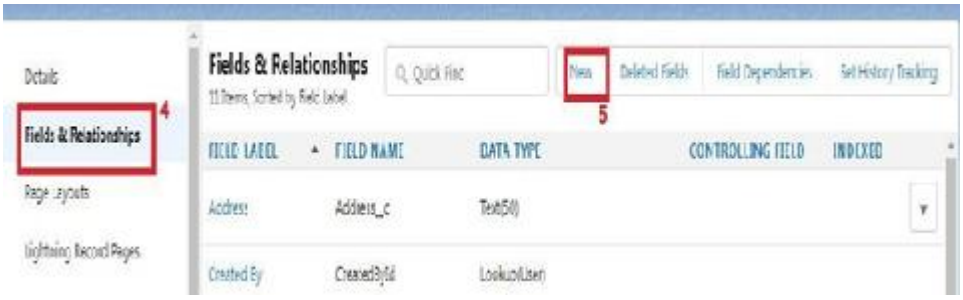
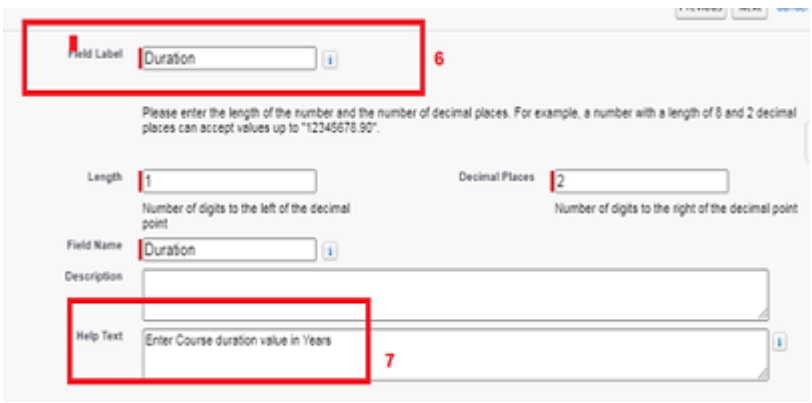
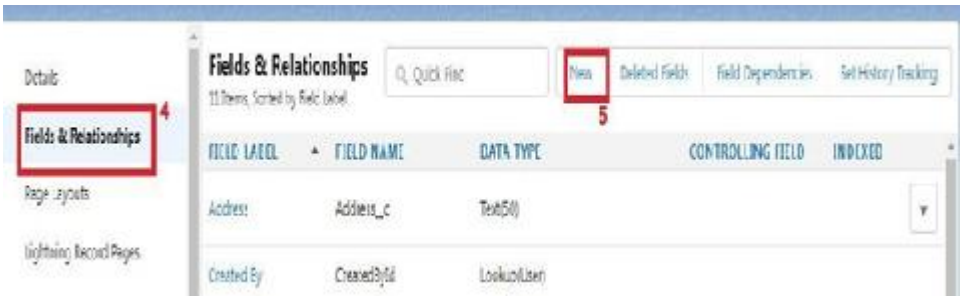
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next
6. For Field Label Duration, enter.
7. Give Help Text- Enter Course duration value in Years
8. Click Next, Next, then Save & New.

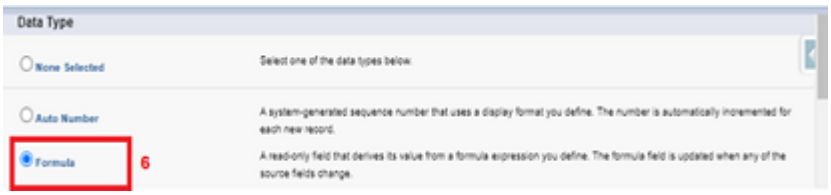


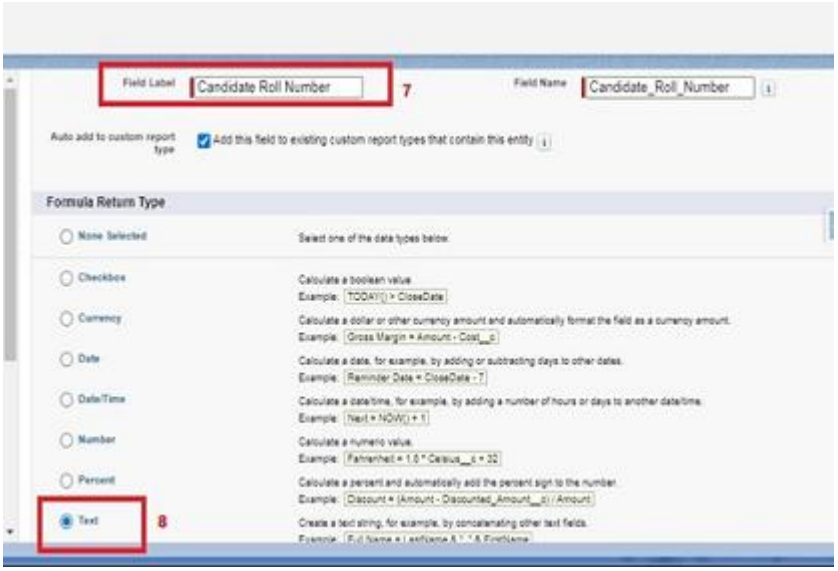


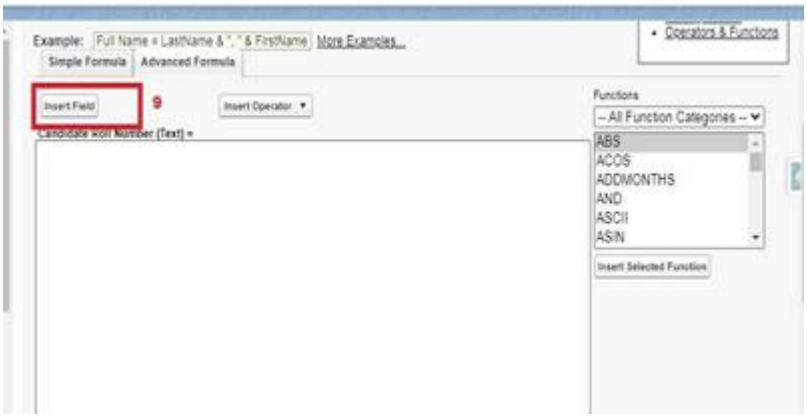
Now Let’s create a Formula field on Internal Results object

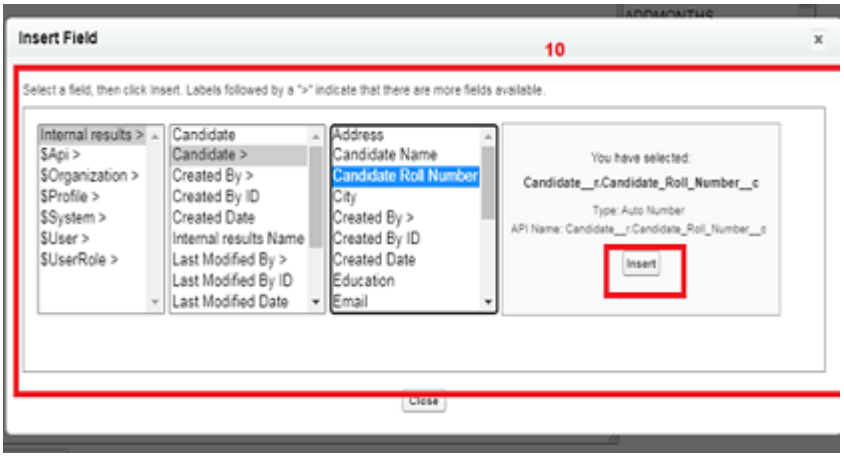
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Internal results.
4. Select Fields & Relationships from the left navigation.
5. Click New
6. Select the Formula as the Data Type, then click Next.
7. Give field label Candidate 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.





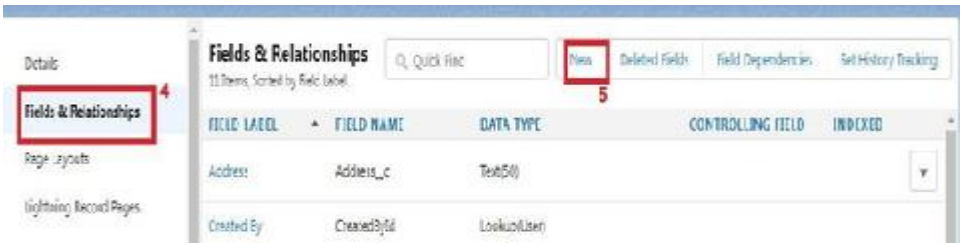

Field Label
Candidate Roll Number
7
Field Name
Candidate_Roll_Number
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value.
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
8
Create a text string, for example, by concatenating other text fields.

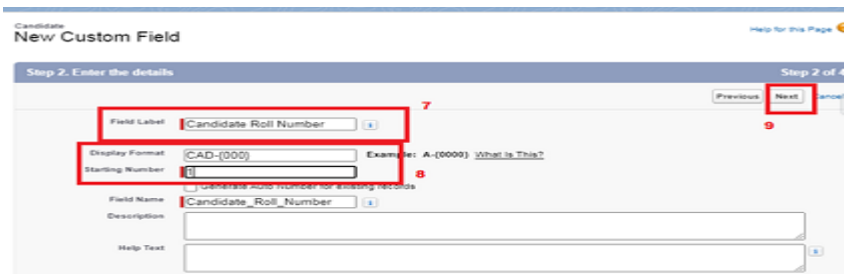

Example: Full Name = LastName & ", " & FirstName
More Examples...
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
9
Insert Operator
Candidate Roll Number (Text) =
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function


Insert Field
10
Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.
Internal results >
$Api >
$Organization >
$Profile >
$System >
$User >
$UserRole >
Candidate
Candidate >
Created By >
Created By ID
Created Date
Internal results Name
Last Modified By >
Last Modified By ID
Last Modified Date
Address
Candidate Name
Candidate Roll Number
City
Created By >
Created By ID
Created Date
Education
Email
You have selected:
Candidate__r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c
Insert
Close

Now Let’s create an auto number field on Candidate object

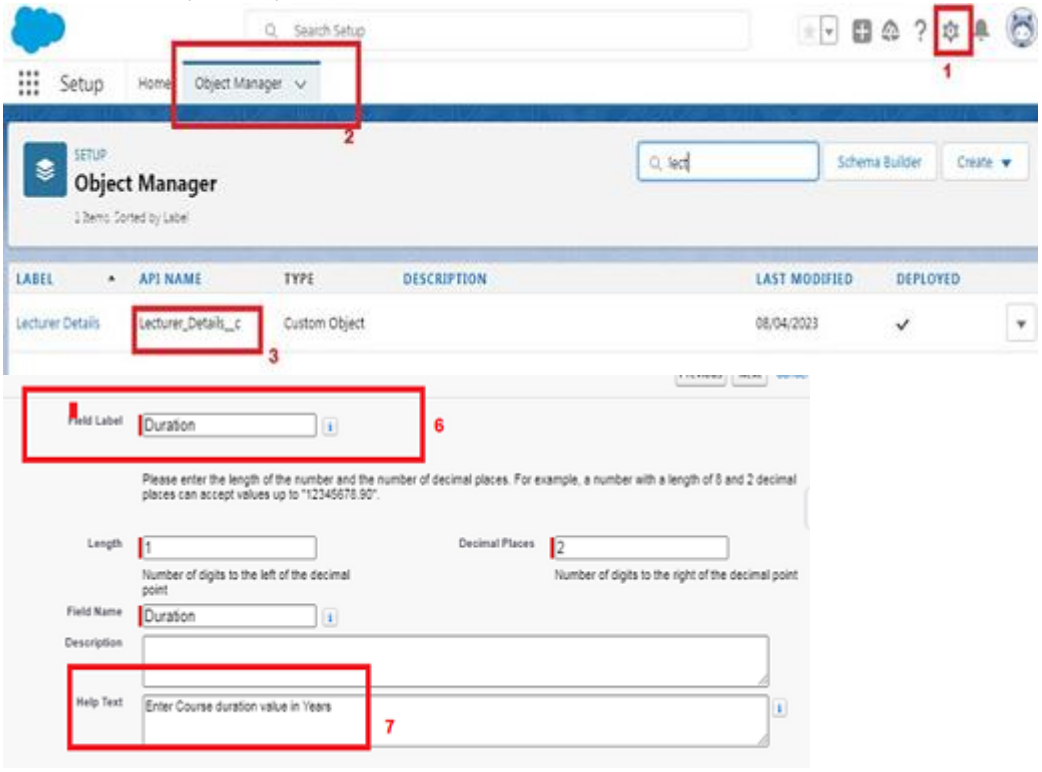
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate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





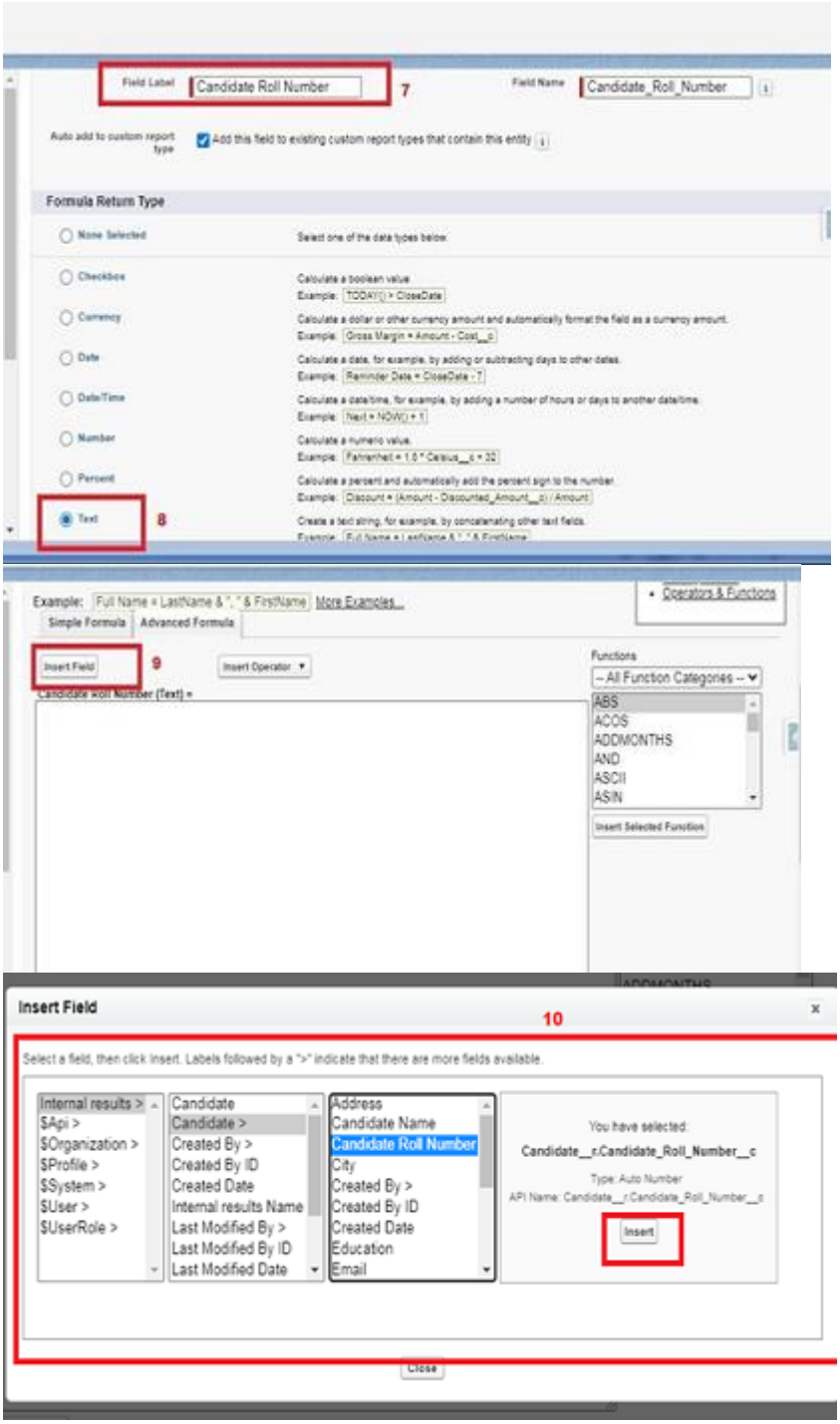
Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

Let’s create a Number field on Course Details object
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.



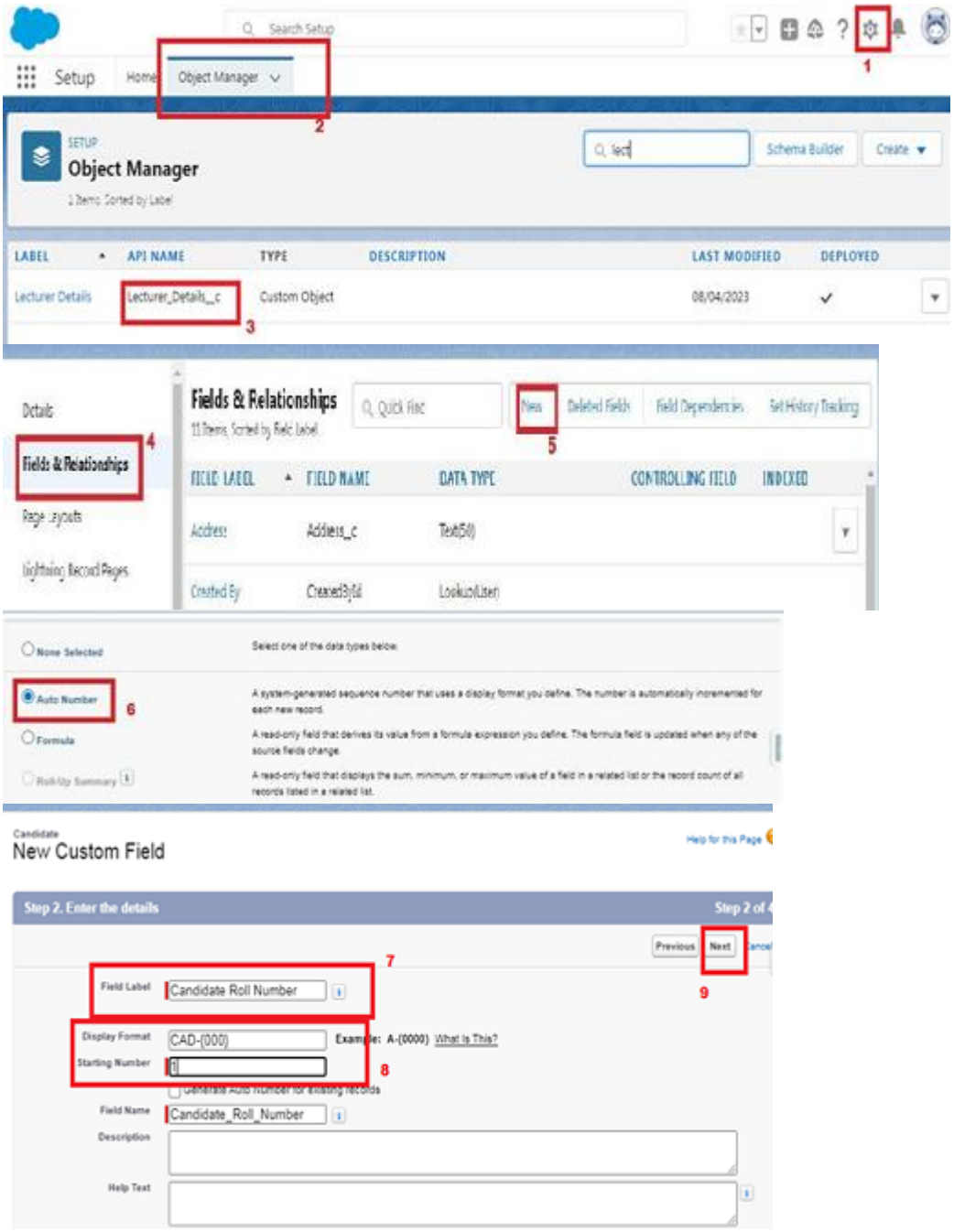
Now Let’s create a Formula field on Internal Results object

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.



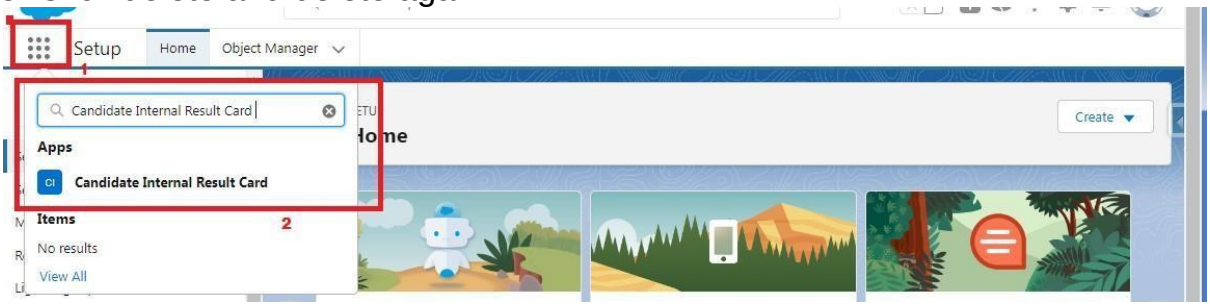
Now Let's create an auto number field on Candidate object

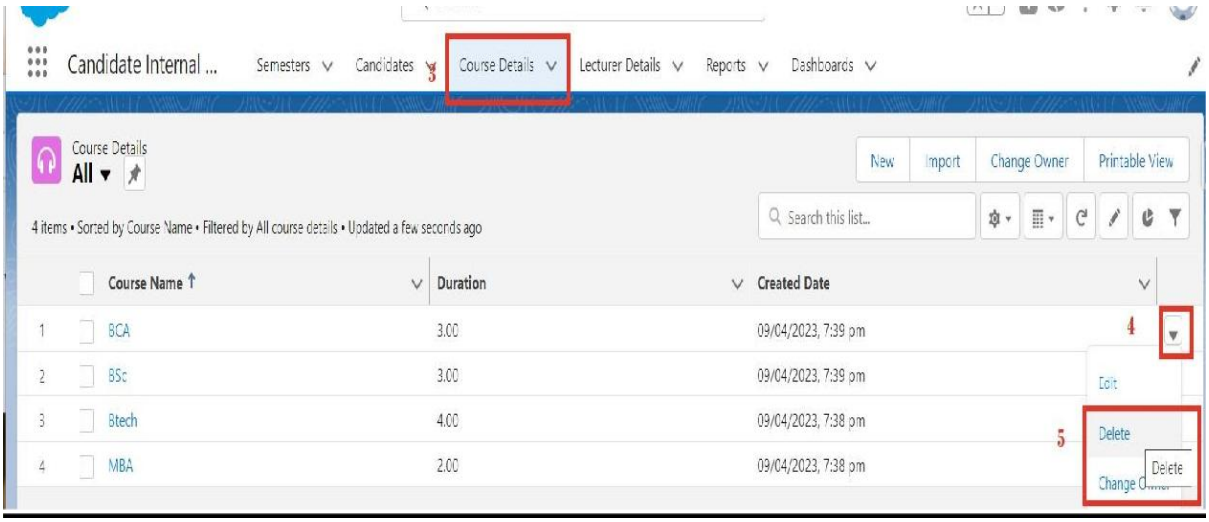
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate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


Setup
Home
Object Manager
1
2
SETUP
Object Manager
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Lecturer Details
Lecturer_Details__c
Custom Object
08/04/2023
3
Details
Fields & Relationships
4
Page Layouts
Lightning Record Pages
Fields & Relationships
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
5
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address__c
Text(50)
Created By
CreatedById
Lookup(User)
None Selected
Auto Number
6
Formula
Roll-Up Summary
Select one of the data types below.
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Candidate
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
7
9
Field Label
Candidate Roll Number
Display Format
CAD-(000)
Example: A-(0000) What is This?
Starting Number
1
8
Generate Auto Number for existing records
Field Name
Candidate_Roll_Number
Description
Help Text

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.

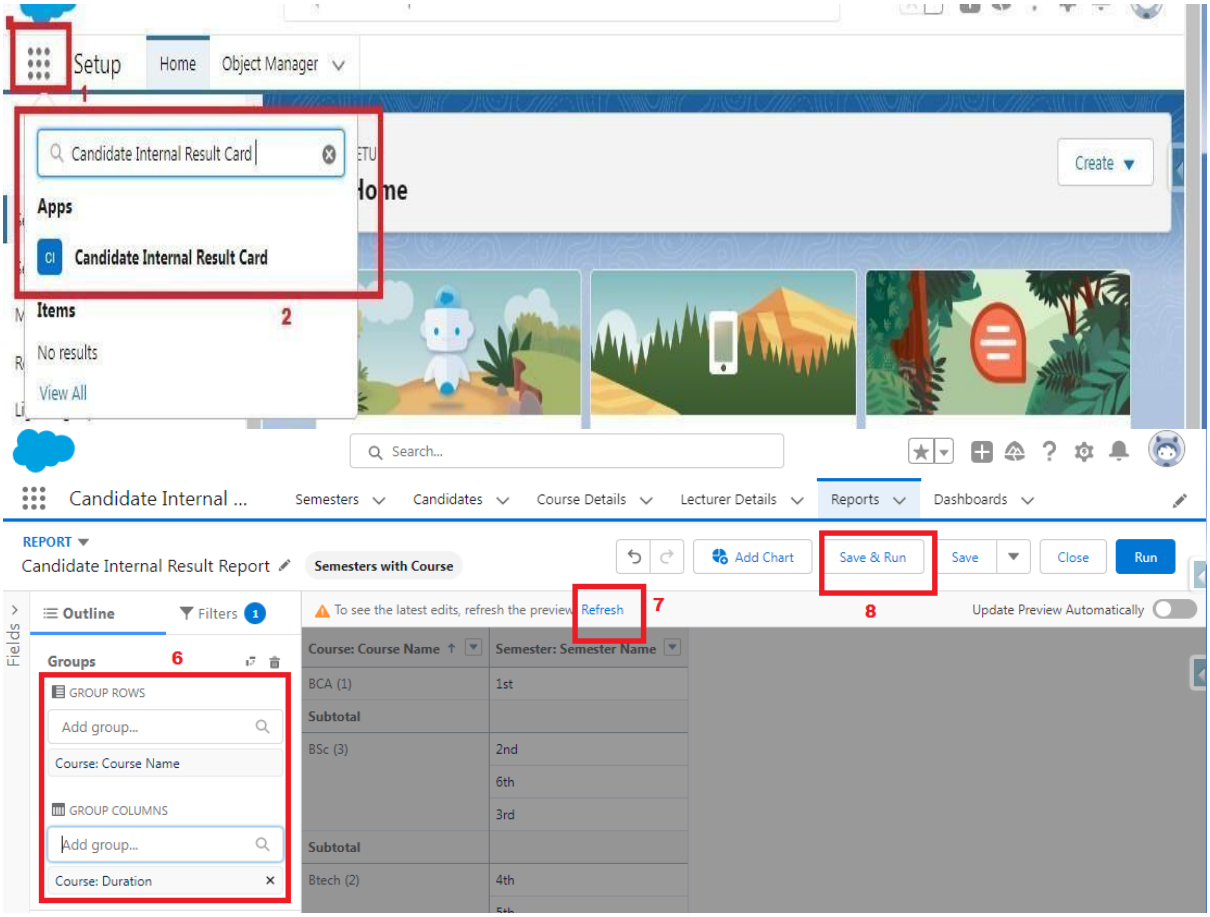




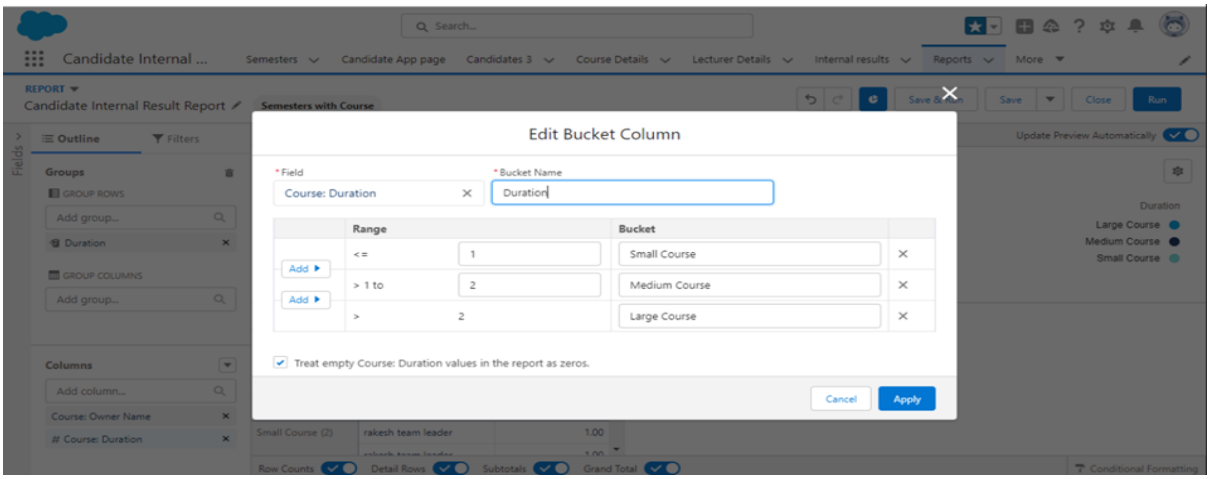
Create Report

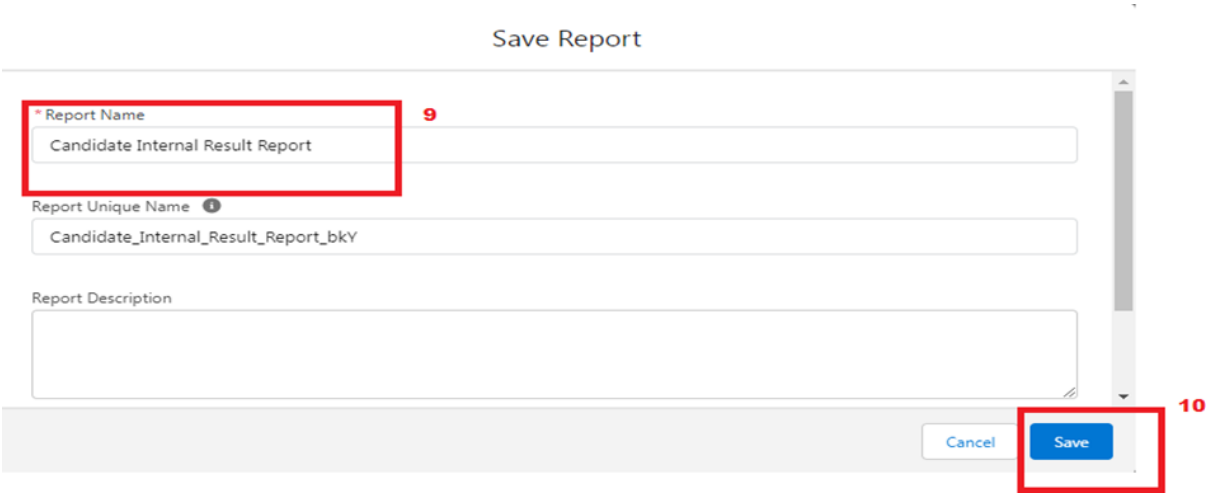
1. Click App Launcher
2. Select Candidate Internal Result Card App
3. Click reports tab
4. Click New Report.
5. Click the report type as Semesters with Course Click Start report.
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a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

NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).



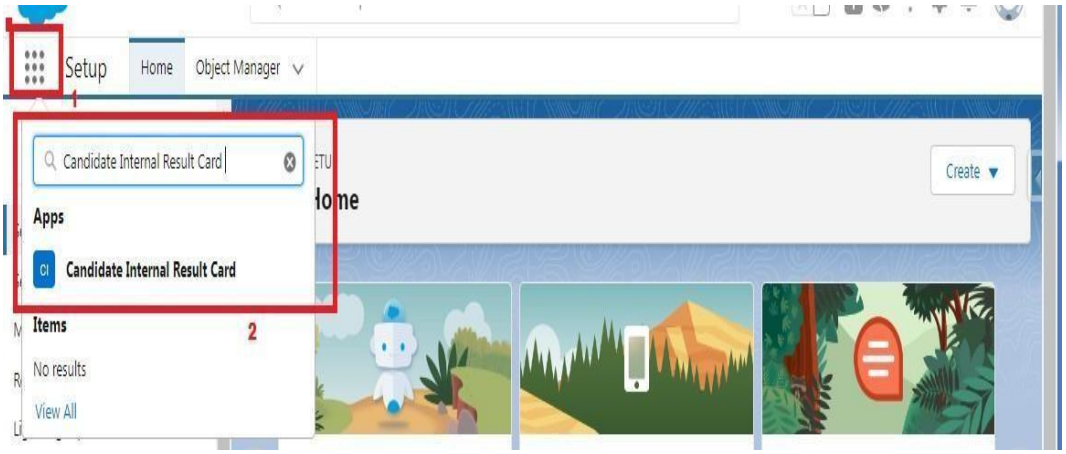
1. On the report builder page, locate the "Fields" pane on the left-hand side.
2. Find the field for which you want to create a bucket field and drag it to the report preview section.
3. Click on the field in the report preview to open the field properties.
4. In the field properties, locate the "Summarize"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

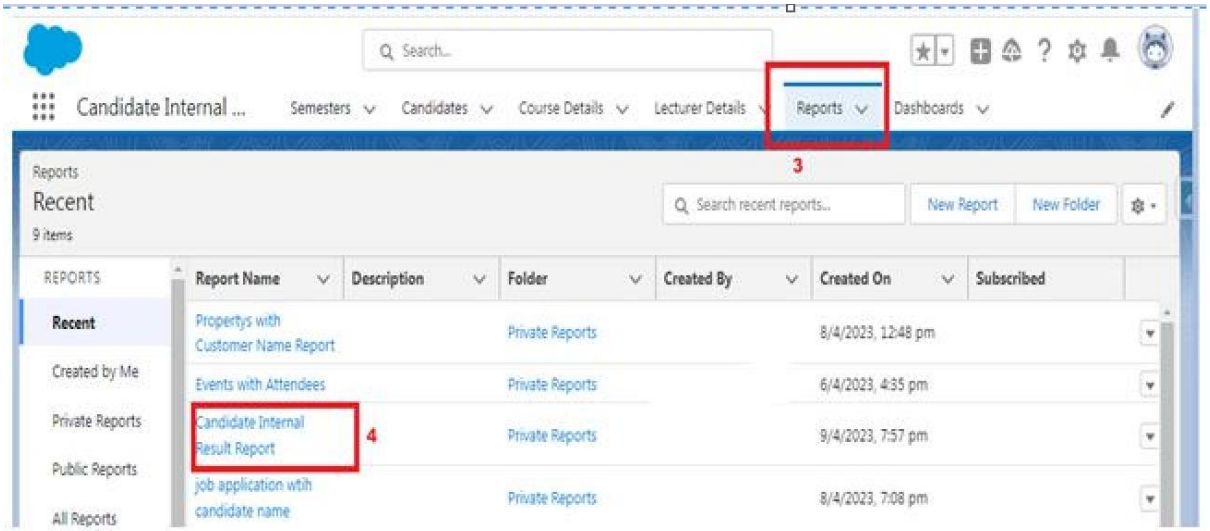




View Report

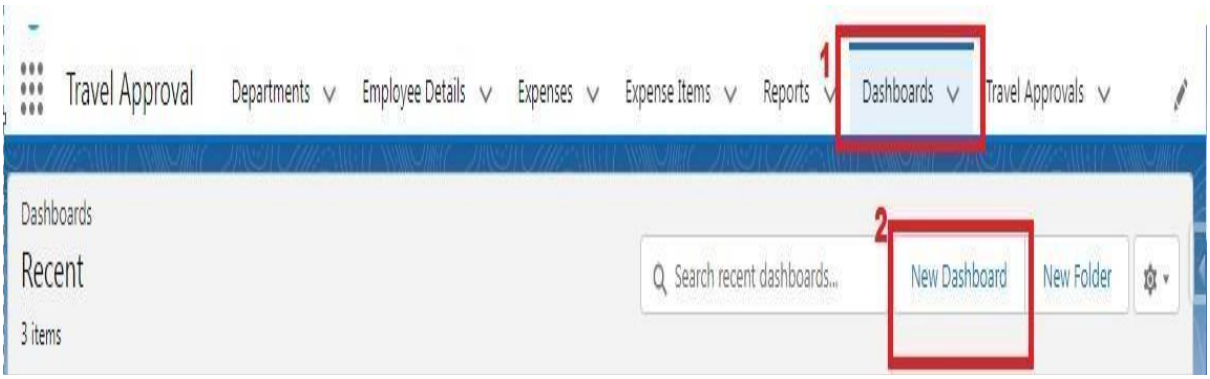
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.
3. Click on Reports Tab.
4. Click on Candidate Internal Result Report and see records.

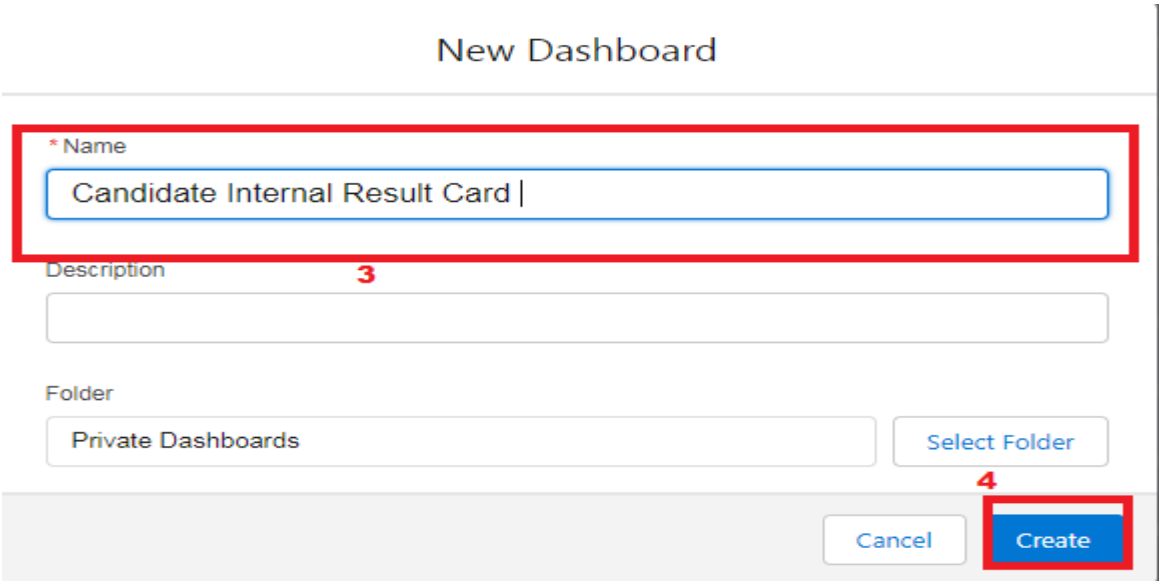


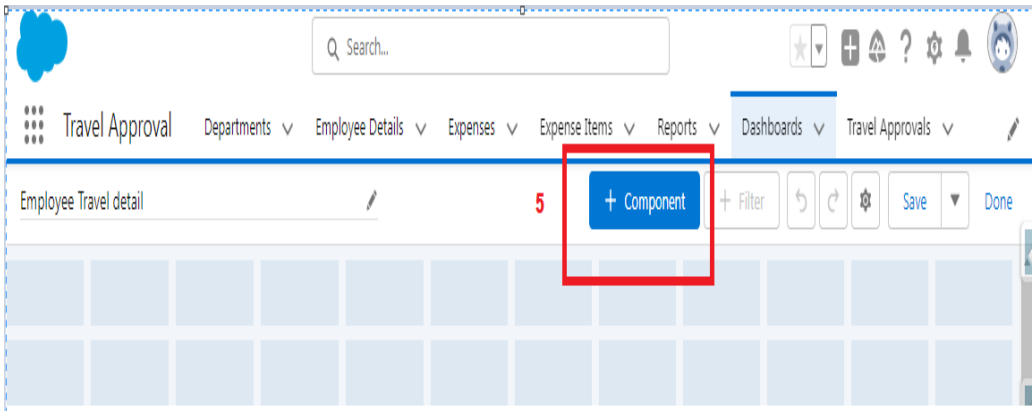


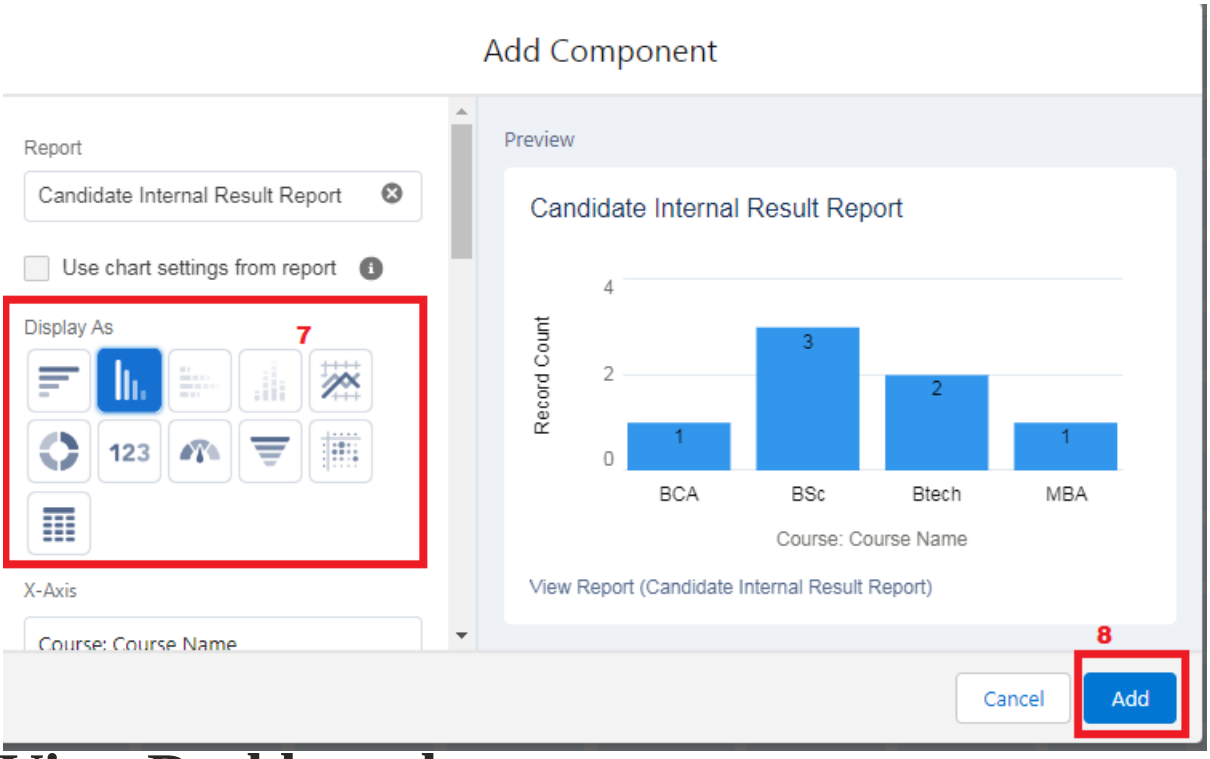
Create Dashboard

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.-



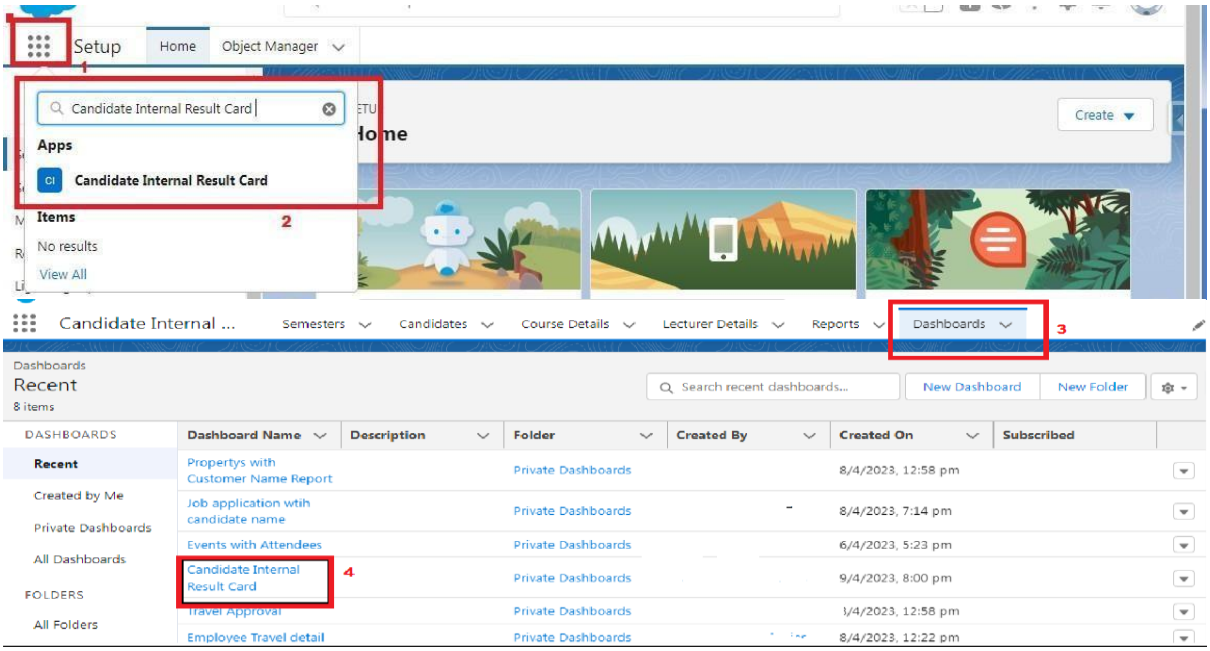

New Dashboard
* Name
Candidate Internal Result Card
Description
3
Folder
Private Dashboards
Select Folder
4
Cancel
Create


Search...
Travel Approval
Departments
Employee Details
Expenses
Expense Items
Reports
Dashboards
Travel Approvals
Employee Travel detail
5
+ Component
+ Filter
Save
Done



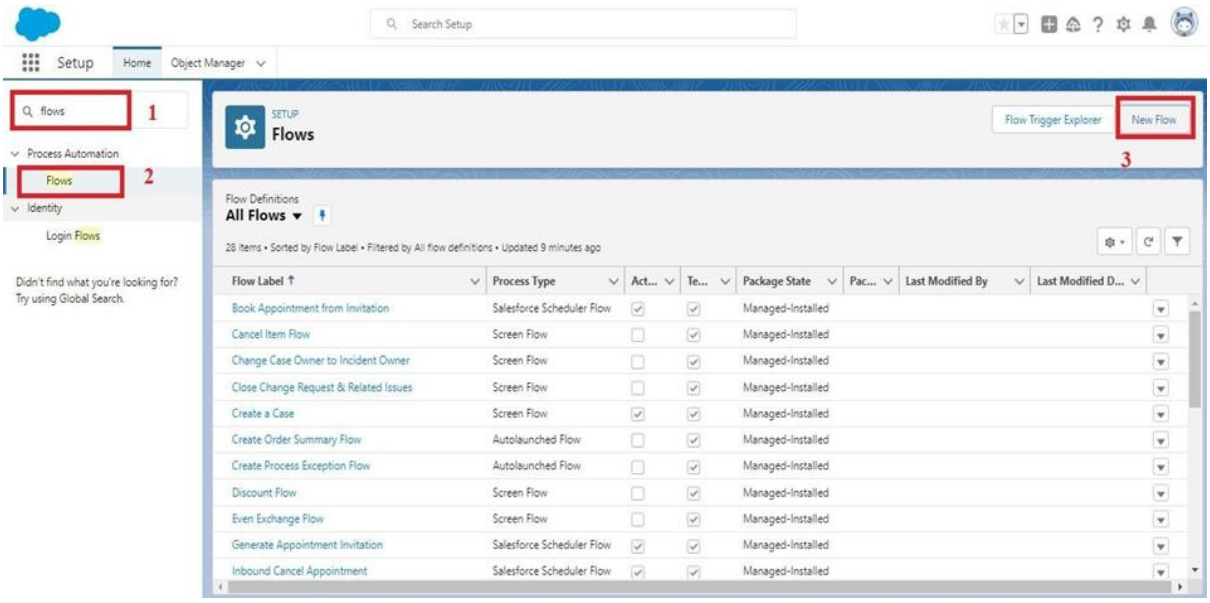
View Dashboard

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

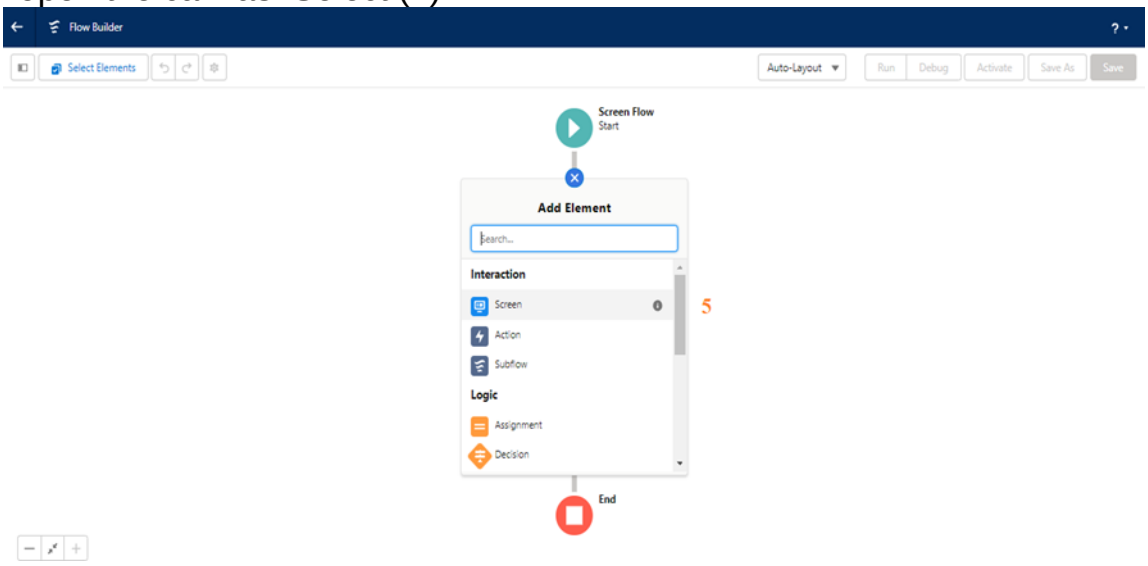


Create A Screen Flow

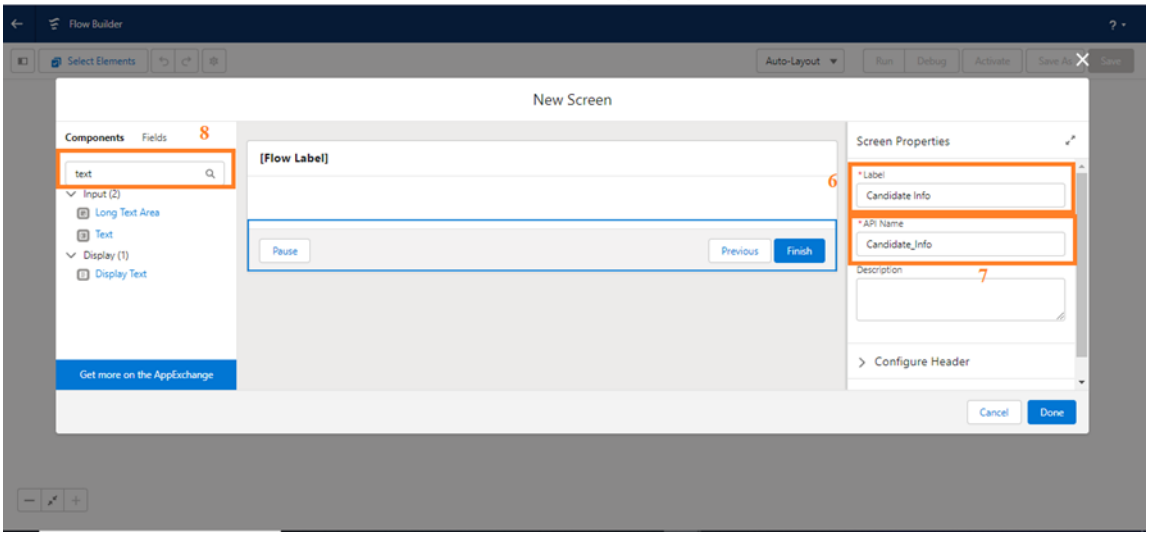
1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3.Click on New flow and Select Screen flow



4.It will open the canvas. Select (+)

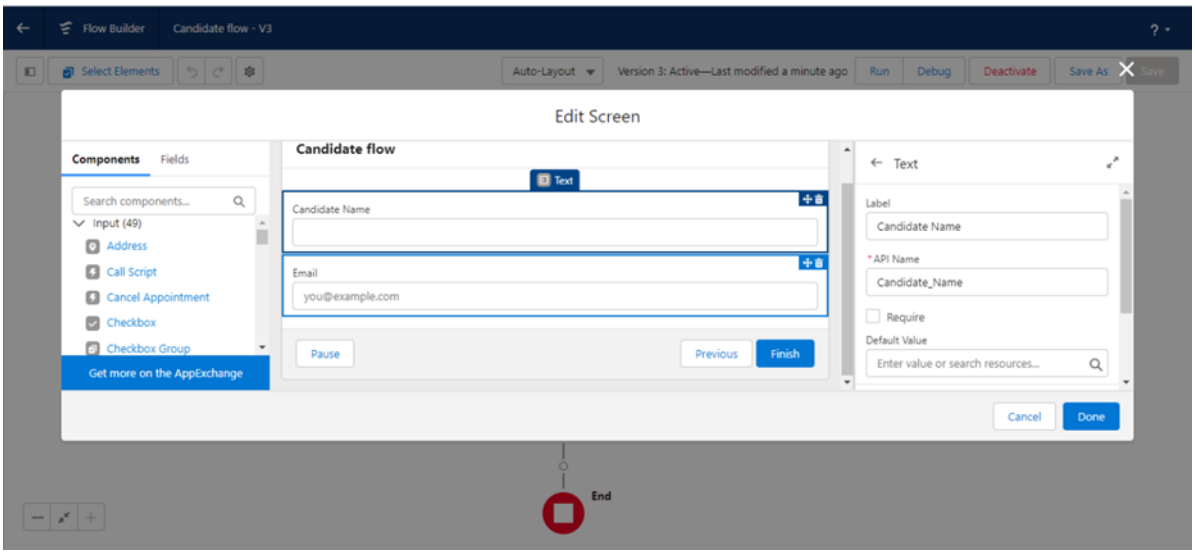


5.Select the screen element from the drop down.

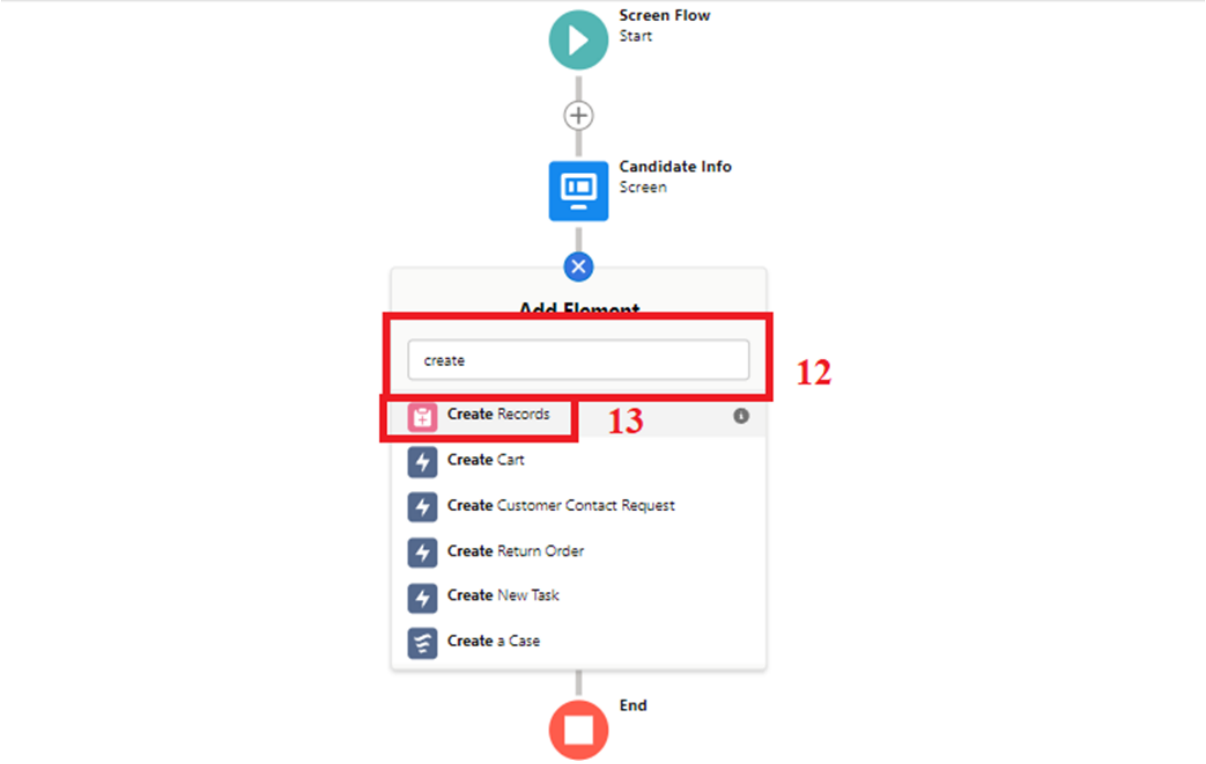


6.It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

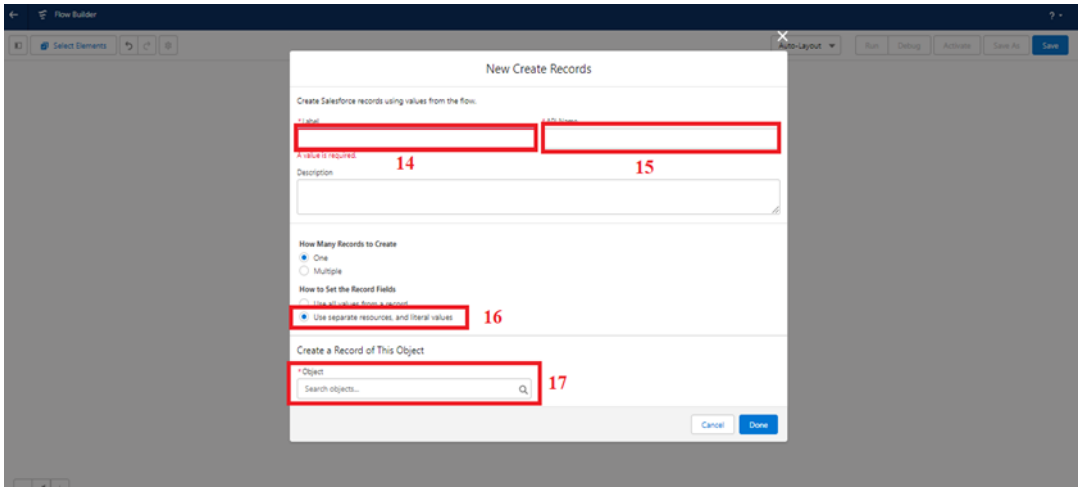
Label: Candidate info
API Name: Candidate_Info (This field will be auto populated.)



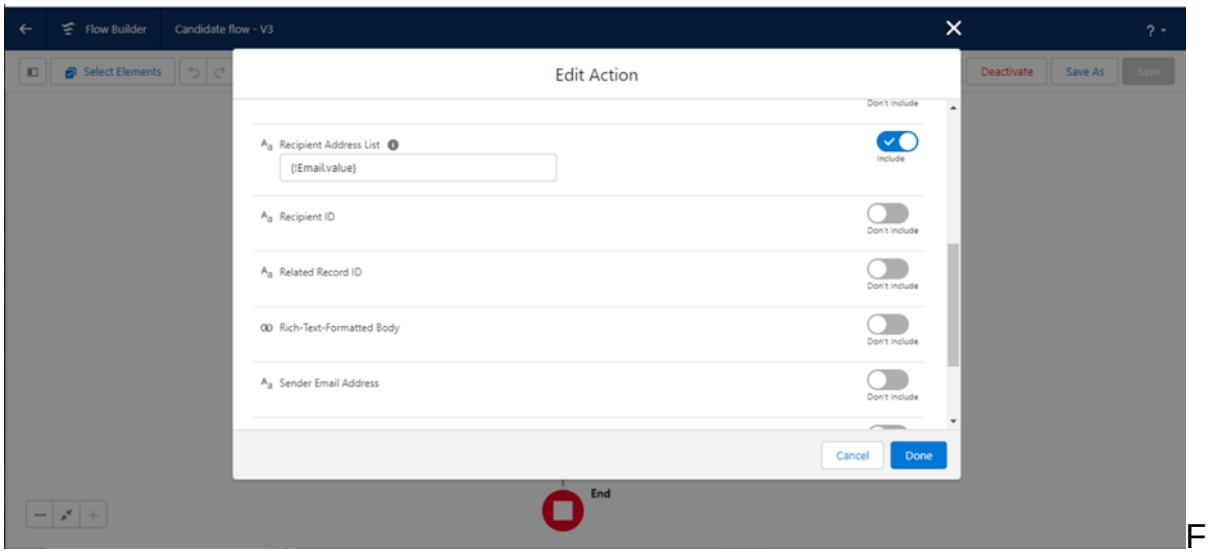
7..In search Component type text and drag the text component to canva and give the label and Api Name



8. 8.Similarly, Add Email Component also.



19.Enable Subject and Give Welcome



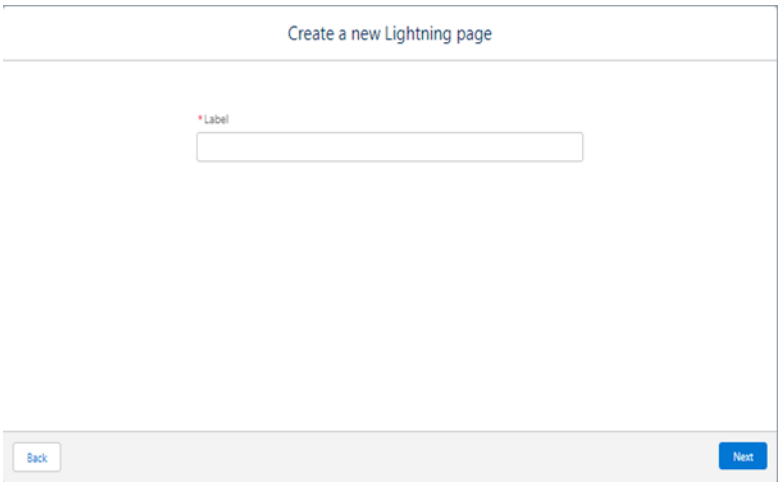
Flow

label: Candidate flow

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

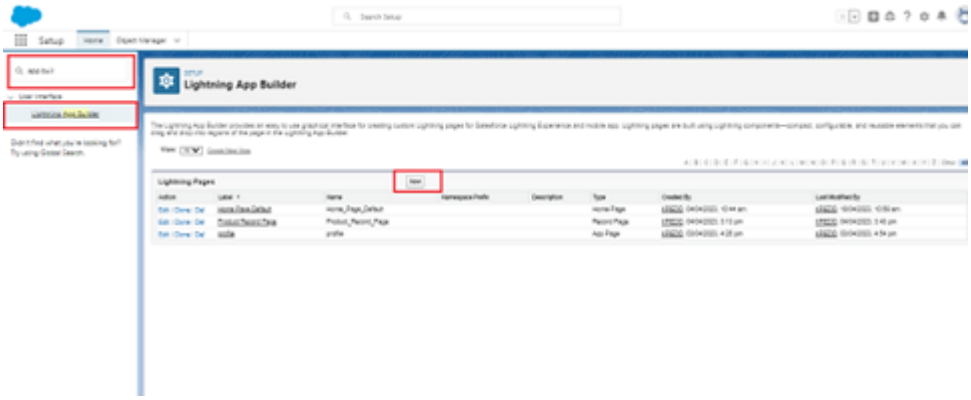
20.Click on save

21.Click on the Activate.

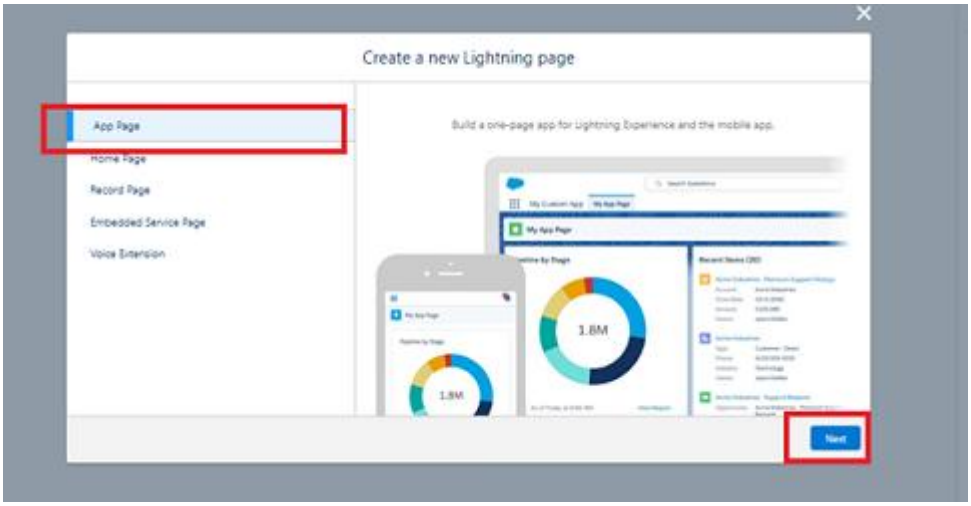


Create An App Page

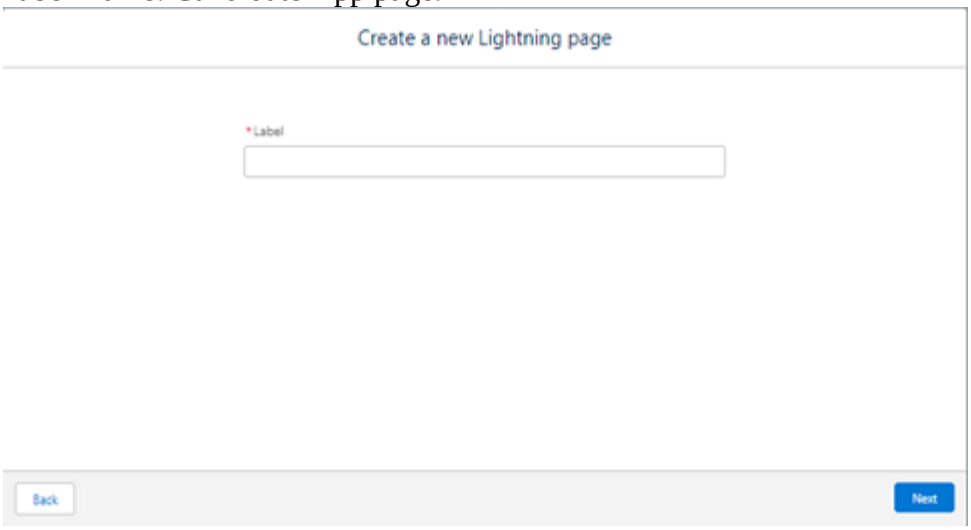
1. Click on the Gear icon and select set up.
2. In Quick Find Box . Type app Builder and select the lighting app builder
3. Select New



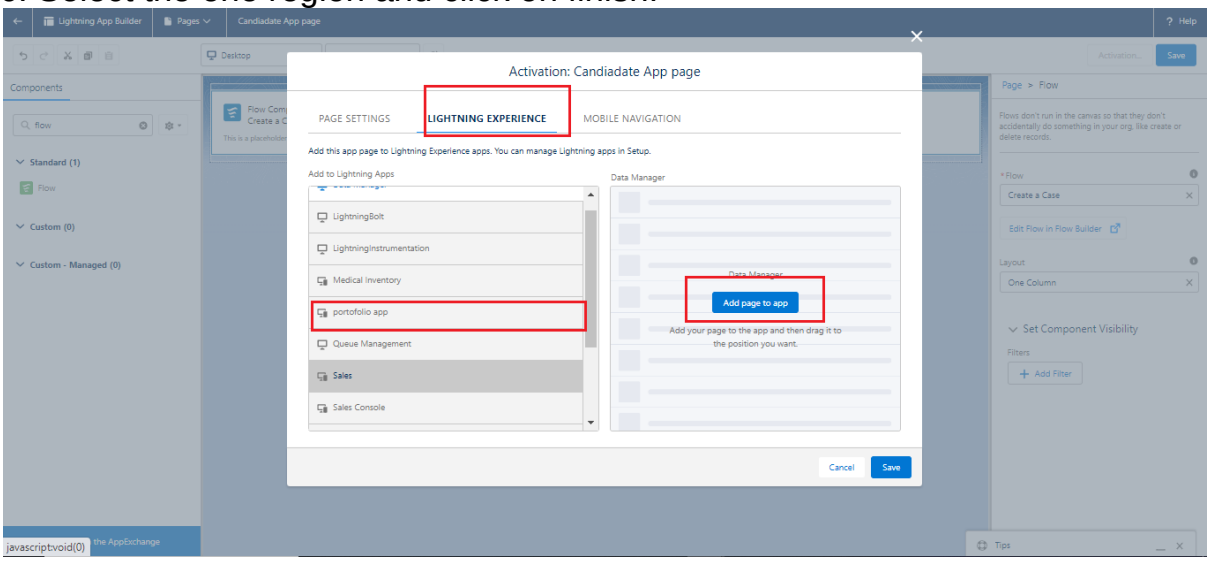
4.Select the App page and click on Next



5. Give the label Name.
Label Name: Candidate App page.

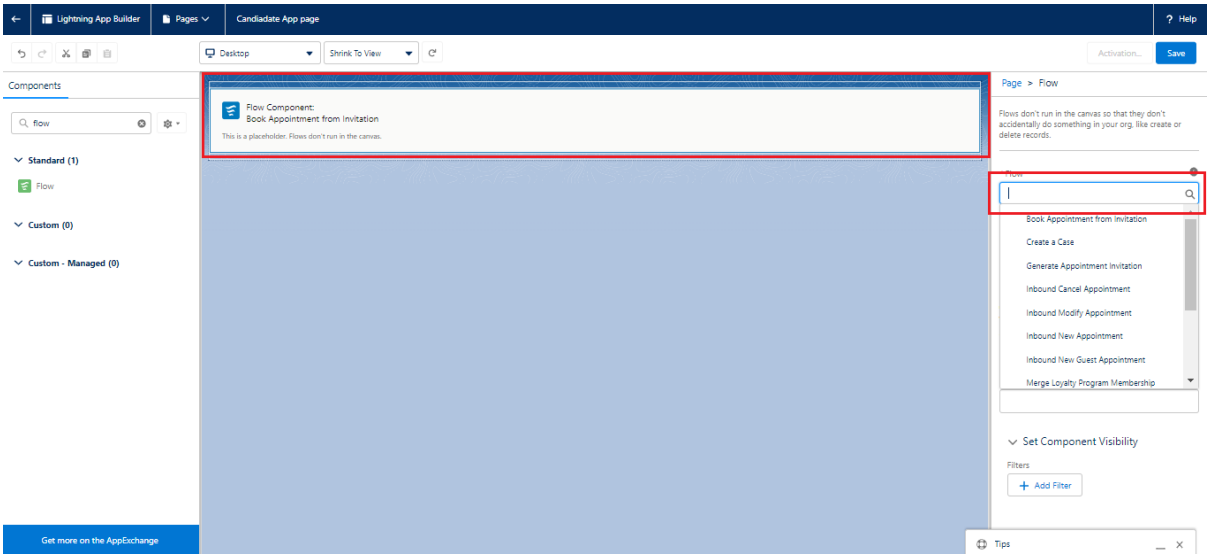


6. Select the one region and click on finish.

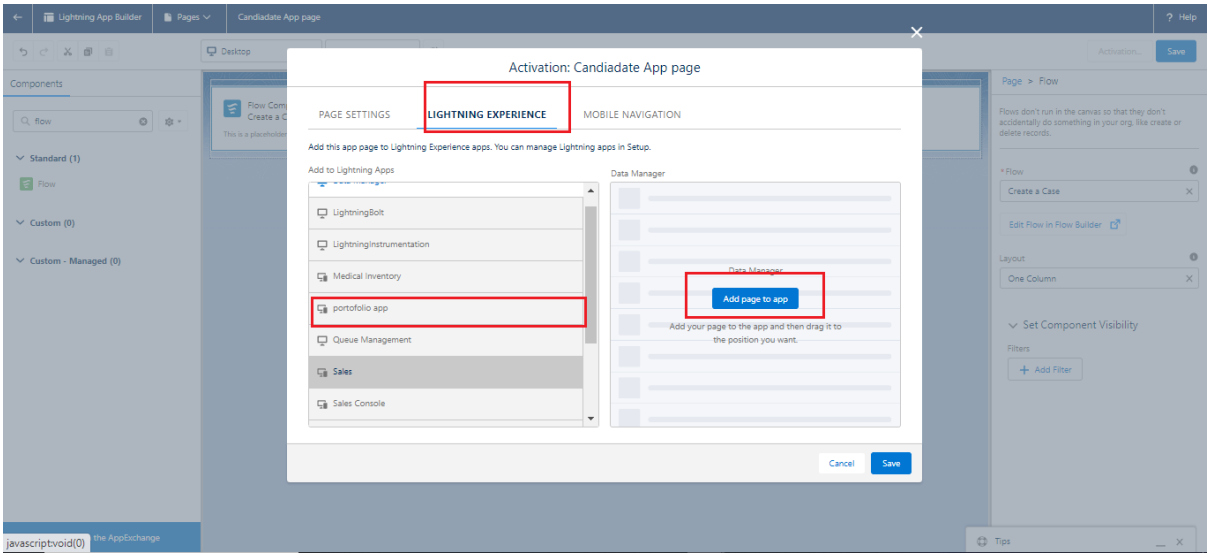


7. Type the flow in the search bar and select the flow component and drag the component to the Add components here.

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



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

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

1. Go to the gear icon and select the developer console.
2. From the menu bar click on file and select Apex class.
3. Now give the class name as InternalmarksHandler
4. Now Write the below code

```
public class InternalmarksHandler {
    public static void beforeinsert(list<Internal_result__c> newlist){

        for(Internal_result__c internalmarks : newlist){
            if(internalmarks.marks__c >= 200){
                internalmarks.status__c = 'Pass';
            }else{
                internalmarks.status__c='fail';
            }
        }
    }
}
```

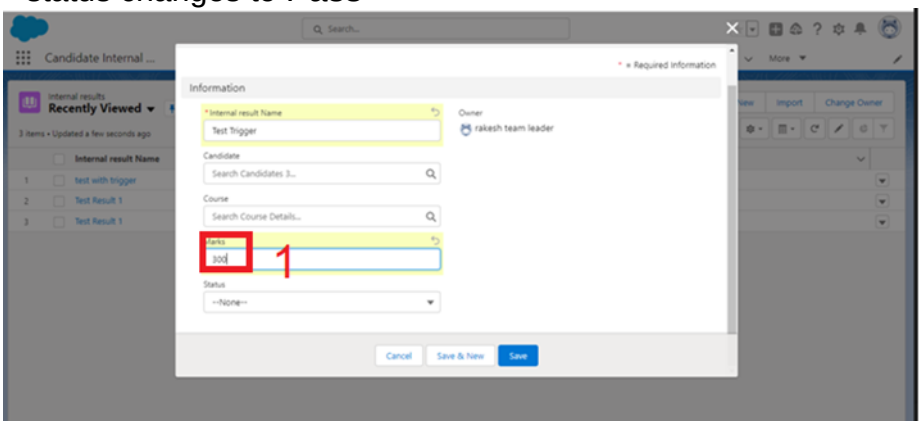
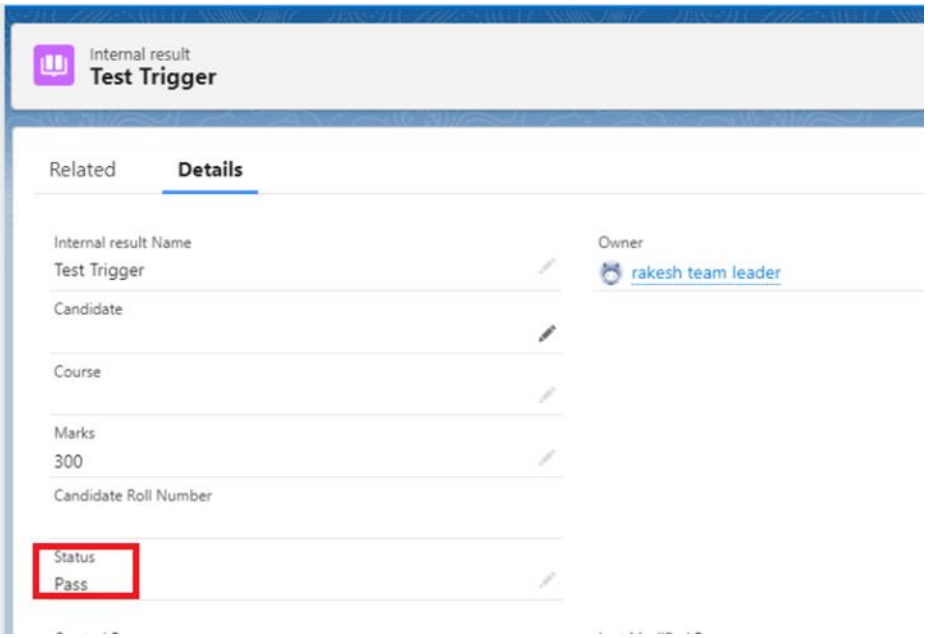
5. From the menu bar click on file and select Apex trigger.
6. Now give the trigger name as Internalmarks
7. Now write the below code

```
trigger Internalmarks on Internal_result__c (before insert) {
    If(trigger.isInsert)
    {
        If(trigger.isBefore)
        {
            InternalmarksHandler.beforeinsert(Trigger.new);
        }
    }

}
```

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

```
        {
            InternalmarksHandler.beforeinsert(Trigger.new);
        }
    }
}
```

8.Trigger Working as follows:

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