INTERNSHIP REPORT

SALESFORCE ADMINISTRATOR

A Summer Internship Work report submitted to

JAWAHARLAL NEHRU TECHNOLOGICAL UNIVERSITY, KAKINADA

In partial fulfilment for the award of the Degree of

BACHELOR OF TECHNOLOGY

IN

MECHANICAL ENGINEERING

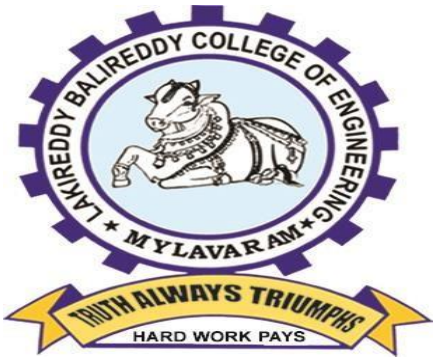
By

CH TARUN

20761A0309

Under the esteemed guidance of

Mr. K.V. VISWANADH



DEPARTMENT OF MECHANICAL ENGINEERING

LAKIREDDY BALI REDDY COLLEGE OF ENGINEERING (AUTONOMOUS)

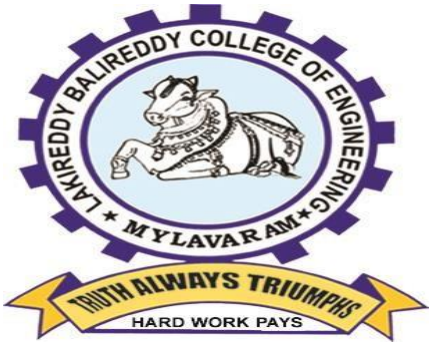
(Approved by AICTE, Affiliated to JNTUK, KAKINADA, Accredited by NBA (Tier-1), NAAC (A Grade) and an ISO 9001-2015 certified Institution)

L. B. REDDY NAGAR, MYLAVARAM, KRISHNA DIST –521230

ANDHRA PRADESH

LAKIREDDY BALI REDDY COLLEGE OF ENGINEERING

DEPARTMENT OF MECHANICAL ENGINEERING



CERTIFICATE

This is to certify that the SUMMER INTERNSHIP report entitled **"LONG-TERM VIRTUAL INTERNSHIP PROGRAM ON SALESFORCE"** that is being submitted by **CH TARUN** bearing **20761A0309** in partial fulfilment for the award of the degree of Bachelor of Technology in Mechanical Engineering is a record of the summer internship work carried out by him under our guidance and supervision.

Internship coordinator **Head of the Department**

Internal Examiner **External Examiner**

ACKNOWLEDGEMENT

The Satisfaction that accompanies that the successful completion of any task would be incomplete without the mention of the people whose cease less cooperation made it possible, whose constant guidance and encouragement crown all efforts with success.

I humbly express my thanks to our management and Principal Dr. K. Appa Rao for extending his support for providing us with an environment to complete our internship successfully.

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I humbly express my thanks to my guide Mr. K.V. Viswanath for giving timely valuable suggestions and encouragement that make the completion of the internship successfully.

I am thankful to our internship coordinator Mr. K. V. Viswanadh for the excellent guidance, timely and valuable suggestions and encouragement that enabled the successful completion of the internship.

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I am thankful to my friends who helped me sharing knowledge and by providing material to complete the internship in time.

CH TARUN
20761A0309

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ABSTRACT

This project is an innovative and comprehensive solution built within the Salesforce platform to optimize the internal marks of the student process for corporate organizations. This project aims to provide a comprehensive and efficient solution for educational institutions, recruitment agencies, and other organizations involved in candidate evaluation. The key objective is to create an integrated CRM system that allows administrators to manage and track the academic performance of candidates using internal marks, streamlining the entire process. this CRM system optimizes candidate evaluation processes, enhancing decision-making, reducing administrative burdens, and ultimately contributing to the success of educational institutions and the efficiency of recruitment agencies. It is a vital tool for nurturing and selecting the best candidates for future success.

CHAPTER 1

INTRODUCTION TO SALESFORCE

1.1 INTRODUCTION TO SALESFORCE

Salesforce is a cloud-based software company that provides customer relationship management (CRM) software and applications. Salesforce's software is focused on Sales, Customer service, Marketing automation, E-commerce, Analytics, Application development.

Salesforce allows businesses to use cloud technology to better connect with partners, customers, and potential customers. Salesforce's services include:

- A platform for customers to develop their own applications.
- Integration with other systems
- Custom solutions for marketing, sales, services, and ecommerce

Salesforce was founded in 1999 in Telegraph Hill, San Francisco. Marc Benioff came up with the idea for Salesforce and had three co-founders: Parker Harris, Dave Mellenhoff, and Frank Dominguez. Salesforce's benefits include Speed, Cost-effectiveness, Security, Global access.

Some of the features of Salesforce are

1.Cloud-Based Platform: Salesforce is delivered as a Software as a Service (SaaS) solution, which means it is hosted in the cloud. This allows for accessibility from anywhere with an internet connection, making it highly flexible and scalable.

2. Customization and Extensibility: Salesforce can be tailored to meet the unique needs of each business. Users can create custom objects, fields, and workflows, and developers can build applications on the Salesforce platform.

3. 360-Degree Customer View: Salesforce provides a unified view of customers, allowing businesses to track interactions, sales opportunities, and support cases. This holistic perspective helps in understanding and servicing customers better.

4.Sales and Marketing Automation: Salesforce offers tools for automating sales and marketing processes, from lead capture to email campaigns. This boosts efficiency and allows for more personalized customer interactions.

5. Analytics and Reporting: Salesforce offers robust analytics and reporting tools, enabling businesses to gain insights into their data and make data-driven decisions.

6.AppExchange: The Salesforce AppExchange is an extensive marketplace of third-party applications and integrations that can be easily added to extend the functionality of the platform.

7. Community and Collaboration: Salesforce facilitates internal and external collaboration through features like Chatter, Communities, and Quip. These tools enhance communication and knowledge sharing.

8. Mobile Accessibility: Salesforce is available on mobile devices, ensuring that sales reps and service agents can access critical data on the go.

9. Security and Compliance: Salesforce places a strong emphasis on security, offering a wide range of security features and compliance certifications to protect customer data.

1.2 INTRODUCTION TO SALESFORCE ADMINISTRATOR

A Salesforce Administrator solves business problems by customizing the Salesforce Platform. They build, configure, and automate technology solutions to deliver business value. Salesforce Administrators work with stakeholders to define system requirements and customize the platform. Most importantly, they enable users to get the most out of Salesforce technology.

A Salesforce Admin best understands how to make the platform work for their company's goals. Some organizations may employ just one admin; some employ many people in this role.

Core responsibilities include supporting users, managing data, maintaining security standards, and delivering actionable analytics. A Salesforce Administrator's colleagues can rely on them to:

- Maintain the platform
- Make it as easy as possible for users of any technical level to use Salesforce
- Stay current on the platform's new tools, capabilities, and updates

Think of Salesforce Administrators as your trusted advisors on all things Salesforce. They are a vital bridge between business and technology.

1.2 ROLE OF SALESFORCE ADMINISTRATOR

A Salesforce Administrator is responsible for managing, configuring, and customizing Salesforce to meet the unique requirements of an organization. They serve as a bridge between the technical and non-technical aspects of the platform and play a key role in ensuring that Salesforce is effectively used to streamline business processes, enhance productivity, and achieve business goals. The main responsibilities of a Salesforce Administrator include:

- User Management : Creating and managing user accounts, profiles, and roles to ensure data security and access control.
- Customization : Configuring custom objects, fields, and layouts to align Salesforce with the organization's specific needs.
- Automation : Utilizing workflow rules, process builder, and other automation tools to automate routine tasks and processes.
- Data Management : Importing, exporting, and cleaning data to maintain data quality.
- Reports and Dashboards : Creating and maintaining reports and dashboards to provide valuable insights into the business.
- AppExchange Integration : Integrating third-party applications from Salesforce's AppExchange to extend functionality.
- Security and Compliance : Implementing security measures, ensuring data compliance, and managing user permissions.

CHAPTER 2

Implementing-CRM-for-Result-Tracking-of-a-Candidate-with-Internal-Marks--ADMIN

2.1 AIM OF THE PROJECT

Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer, Lecturer should have the ability to create Internal Results, Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results, Re-evaluation Can be initialized by Candidate for all Internal Results. Now only dean can update the marks after re-evaluation.

"Implementing CRM for Result Tracking of a Candidate with Internal Marks - ADMIN," is to develop and implement a comprehensive Candidate Relationship Management (CRM) system focused on tracking candidates' academic performance using internal marks. This project seeks to address the following objectives:

Efficiency Enhancement: The primary aim is to streamline and optimize the process of managing and tracking candidates' academic records, making it more efficient and less time-consuming for administrators.

Data Centralization: The CRM system aims to create a centralized repository for candidate information, academic records, and internal marks, ensuring that all relevant data is easily accessible and well-organized.

Data-Driven Decision-Making: By providing robust reporting and analytics tools, the system aims to empower administrators with data-driven insights for making informed decisions regarding candidate selection and academic performance.

User-Friendly Experience: The system aims to provide a user-friendly interface to enhance the user experience for administrators, making it easy to input, update, and access candidate information.

Security and Privacy: Ensuring the security and privacy of candidate information is another significant aim, with strict access control and data protection measures in place.

Integration and Customization: The CRM system aims to be adaptable, allowing integration with other systems used by educational institutions or recruitment agencies. Customization options are provided to tailor the system to specific organizational needs.

Scalability: The system is designed to grow with the organization, accommodating an increasing number of candidates and administrators.

In summary, the primary aim is to provide a comprehensive and efficient solution for managing candidate records, benefiting educational institutions and recruitment agencies by improving the quality of candidate selection, reducing administrative overhead, and enhancing the overall experience for both candidates and administrators.

2.2 OBJECTIVES OF THE PROJECT

The primary objectives of the project were as follows:

- To create and maintain a comprehensive database of candidate information, including personal details, contact information, and enrollment data.
- To monitor and track candidate attendance, as it can be a critical factor in their overall performance.
- To automatically calculate and store the results based on the internal marks and attendance data.
- Set up alerts and notifications to inform candidates and their guardians about their results and progress.
- Design the CRM system to be scalable, allowing for future growth and the addition of more candidates, courses, or modules.

2.3 KEY ELEMENTS USED

1) OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types

- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

2) TAB

Tabs in Salesforce help users view the information briefly. It displays the data of objects and other web content in the application. There are mainly 4 types of tabs

- Standard Object Tabs: Standard object tabs display data related to standard objects.
- Custom Object Tabs: Custom object tabs display data related to custom objects. 5
- Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
- Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

3) LIGHTNING APP

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

- Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.

- Custom Apps: Custom apps are created according to the needs of the user. Custom Apps are made by using standard and custom tabs together.

4) FIELDS AND RELATIONSHIPS

Fields - Fields store data values that are required for a particular object in a record. An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

5) USERS

A user is anyone who logs into Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

6) USE CUSTOMIZATION

Customization refers to custom software development and coding to add robust features to your CRM platform. These features can be integrated with your business to have a scalable impact.

7) DATA IMPORT

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyse all your data in ways that better reflect your business. The Data Import Wizard is a Tool that makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects. To complete this milestone, you need to create a CSV file and give them the data given in the picture below. After that from these CSV files we will import data for Department & Travel Approval (Custom Object).

8) VALIDATION RULES

It can contain a formula or expression that evaluates the data in one or more fields & returns a value of true or false. Validation Rules also include an error message to display to the user when the rule returns a value true due to an invalid value/data.

9) REPORTS

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

10) DASHBOARDS

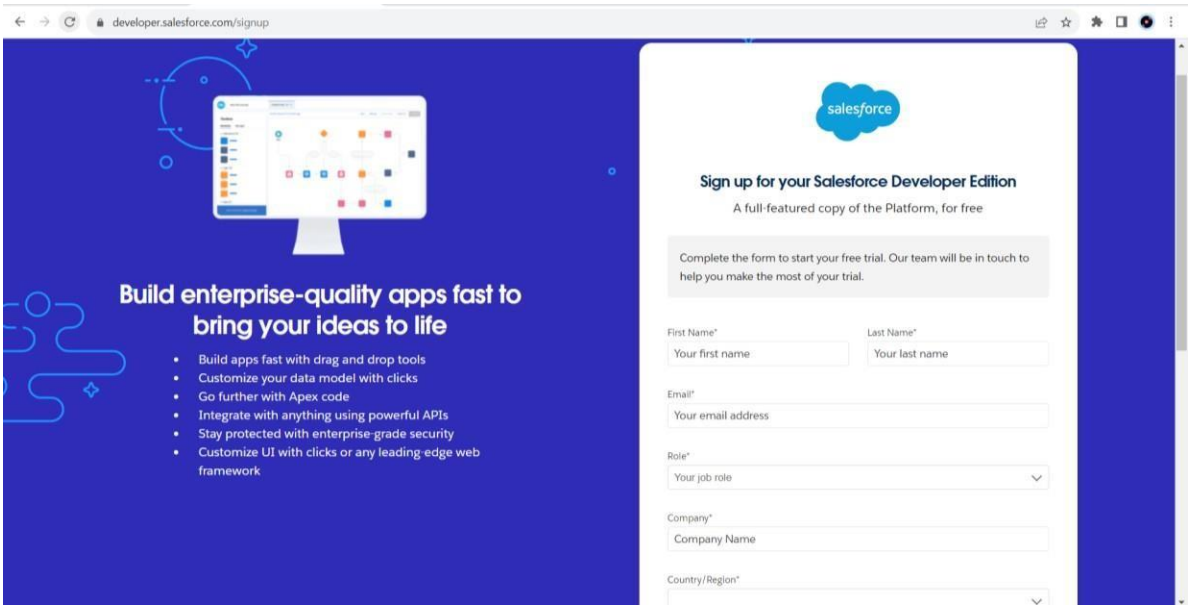
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

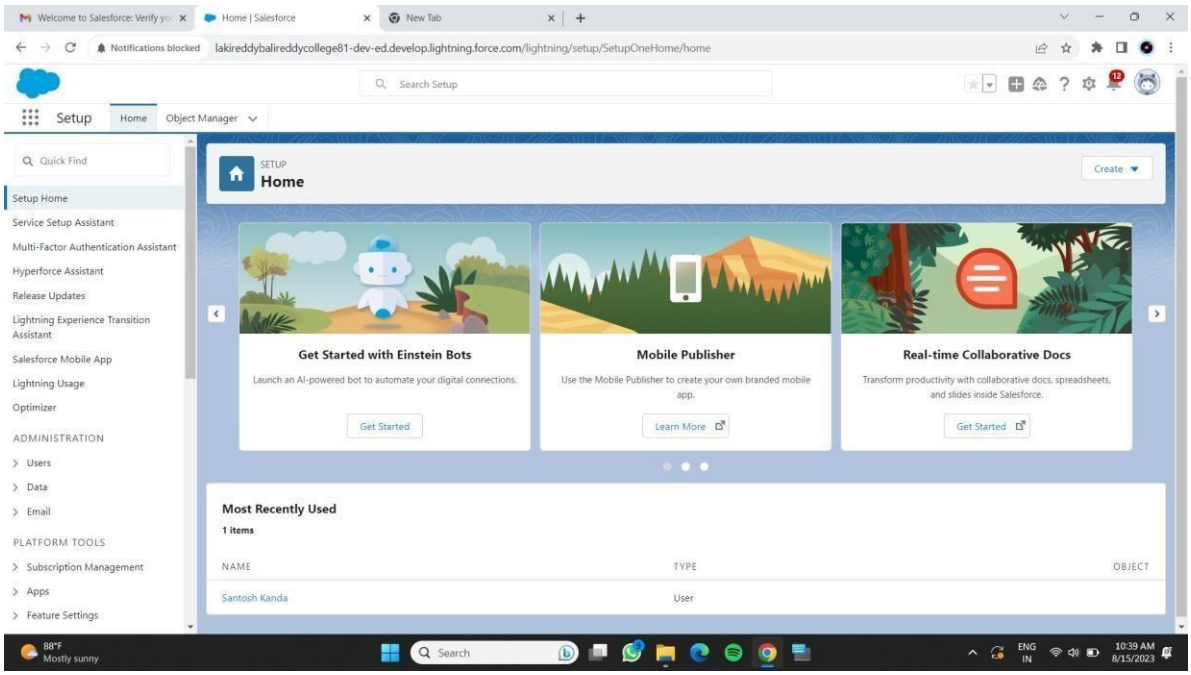
CHAPTER 3

PROJECT IMPLEMENTATION

3.1 PROCEDURE

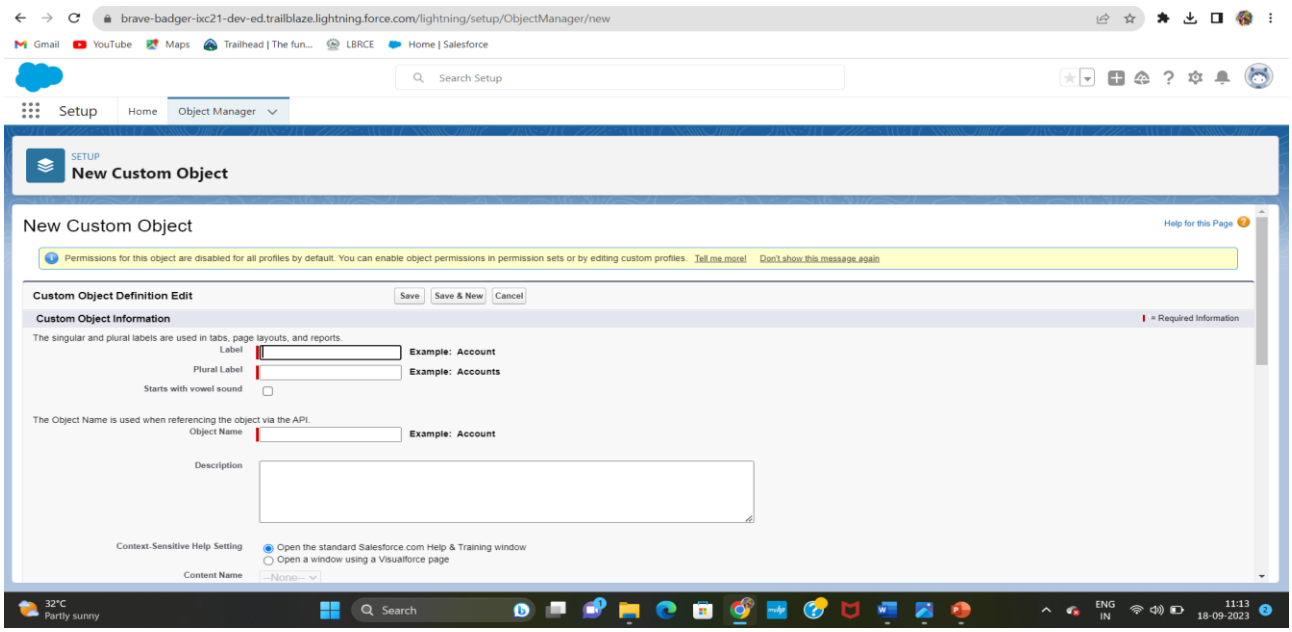
Creation of Salesforce Org and Account Activation

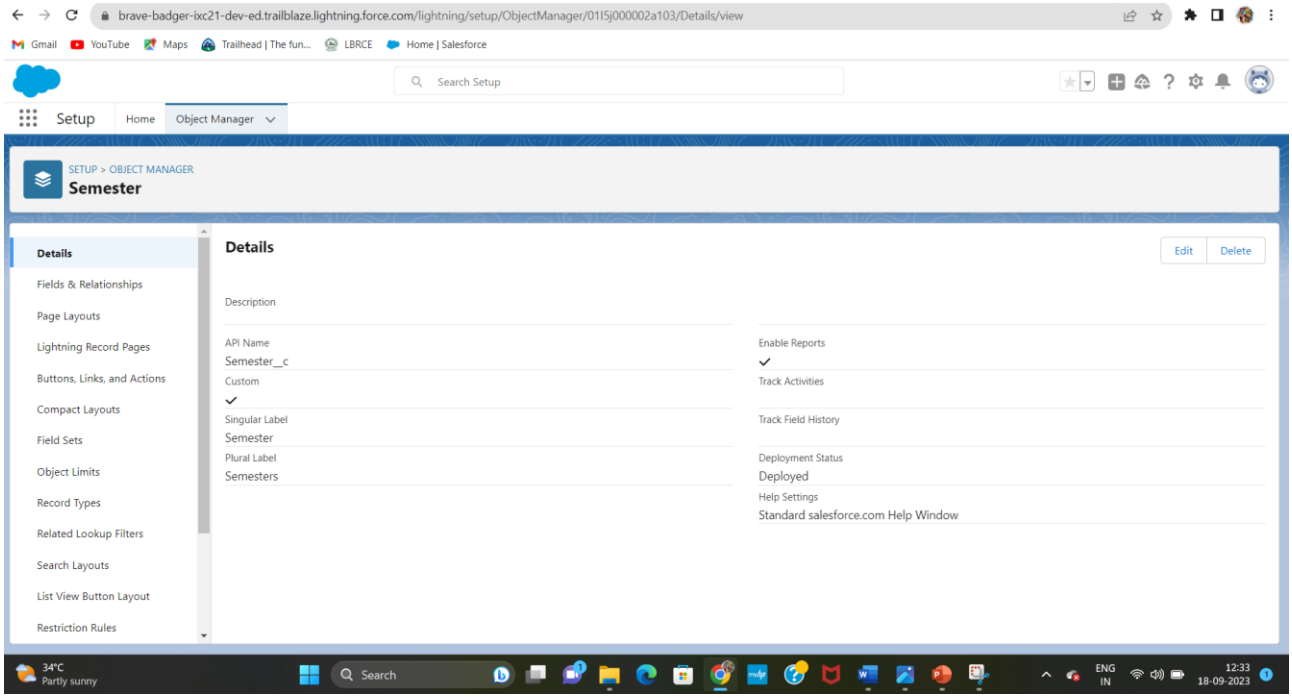


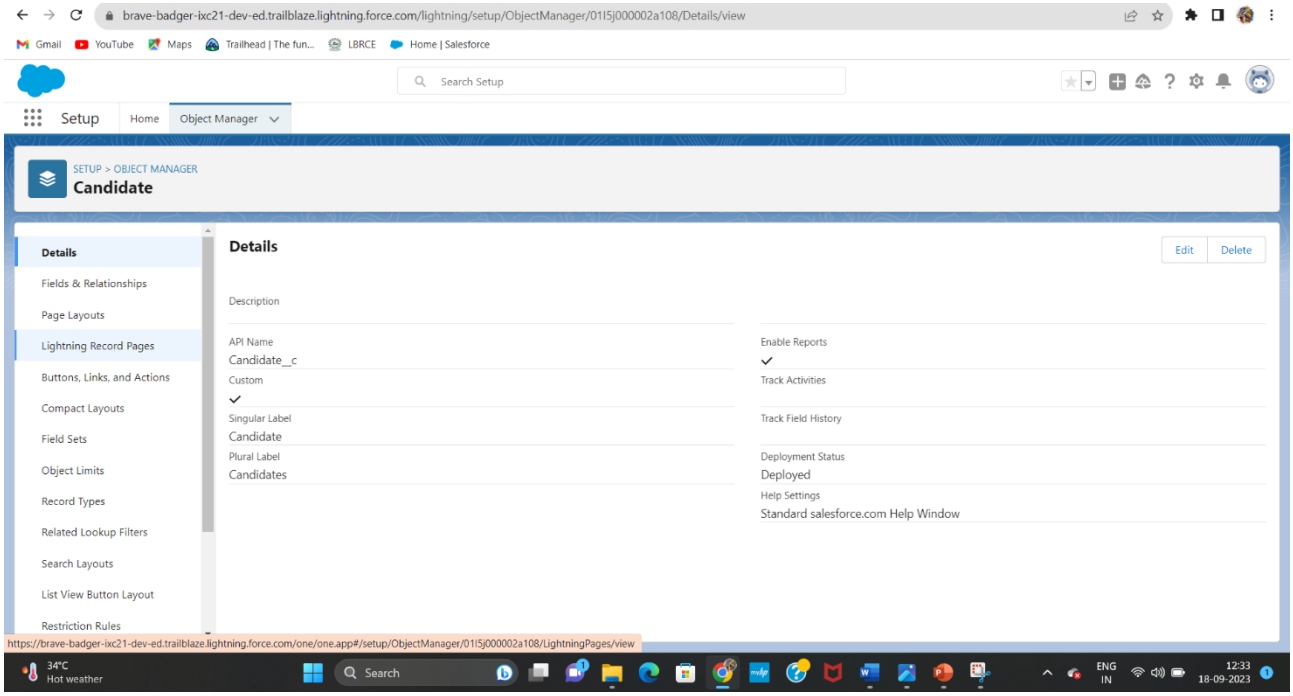


Creation of Custom Objects

For this Travel Approval we need to create 5 objects **Semester,Candiate,Course details,lecture details,Internal results**.



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API Name
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Custom
Singular Label
Candidate
Plural Label
Candidates
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
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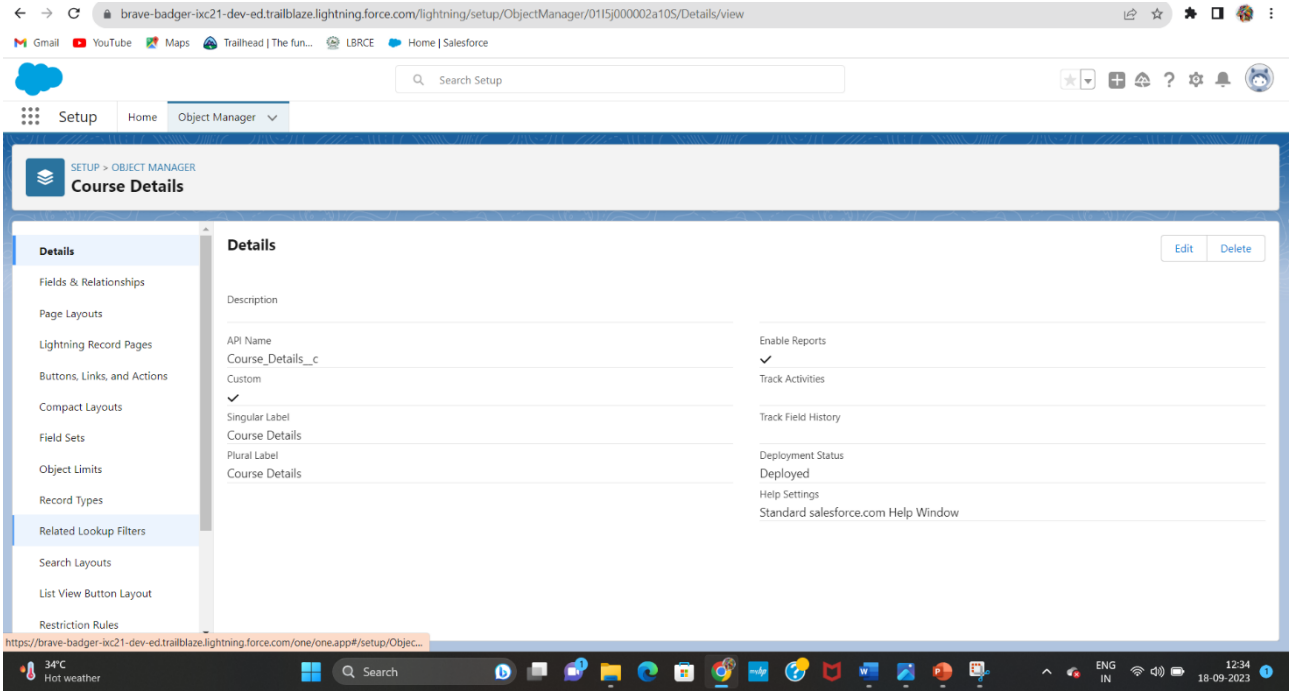
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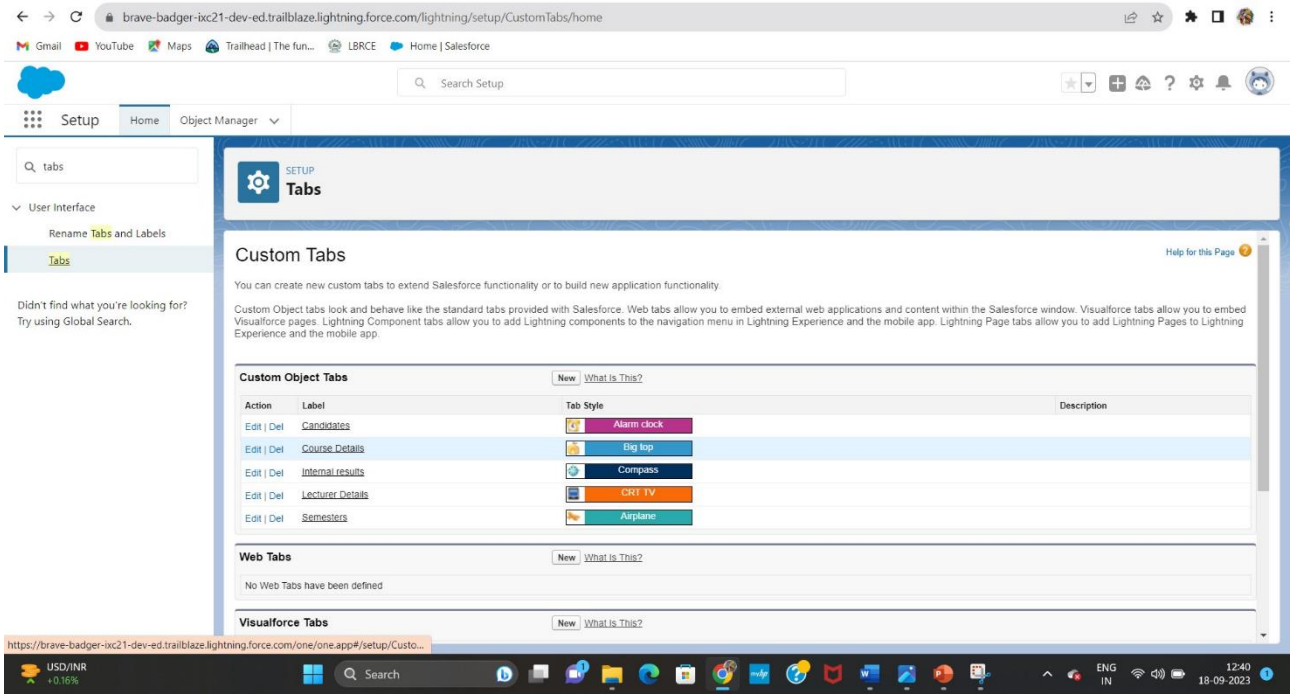
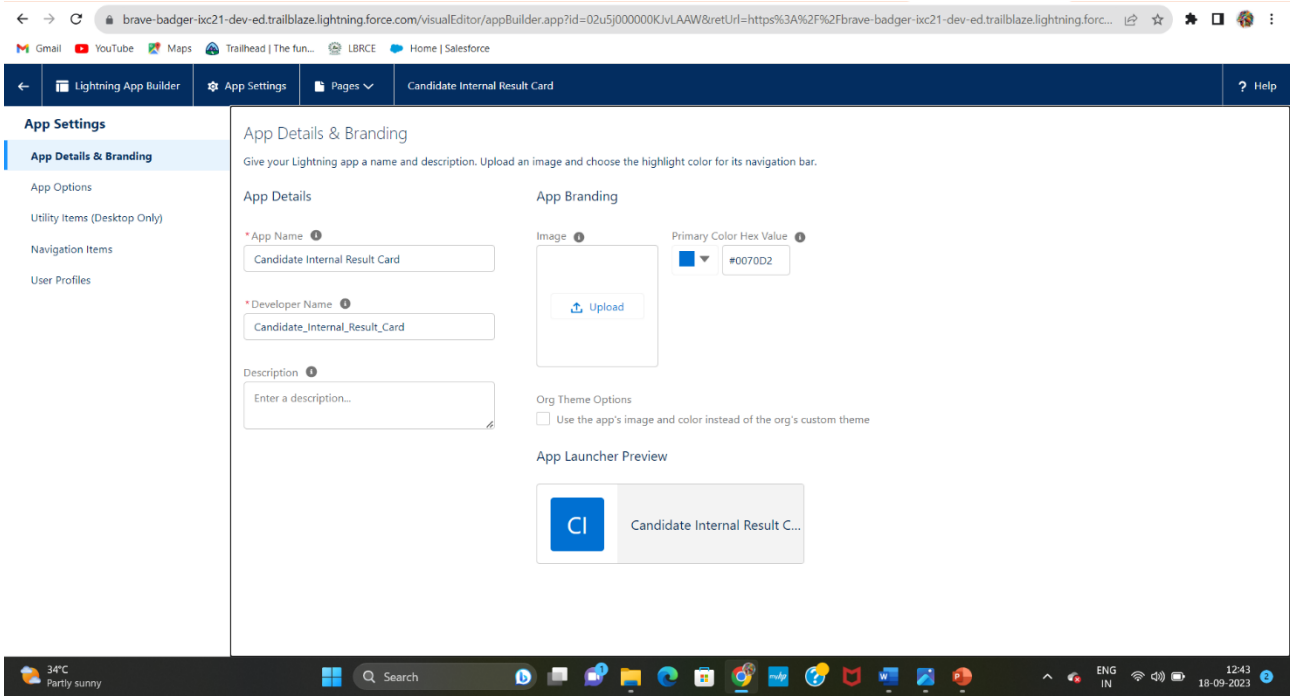
Creation of Custom Tabs

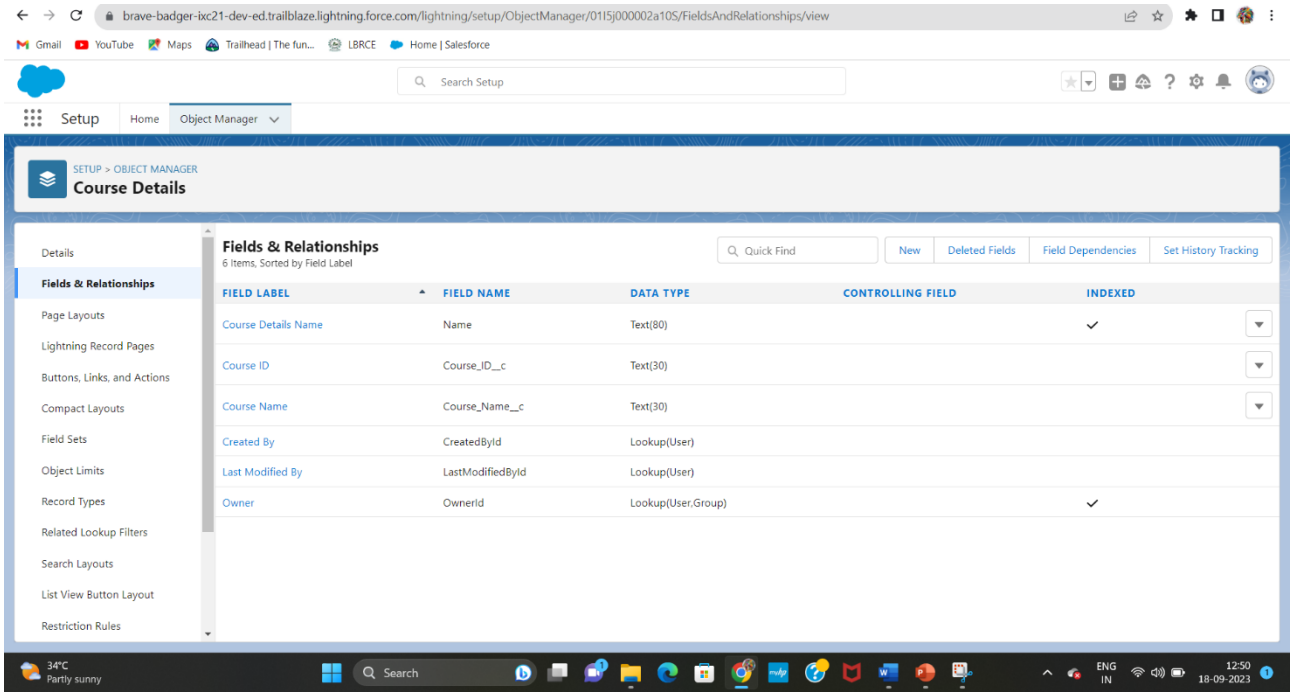


Creation of Candiate internal marks App (Lightning App)



Creation of Fields

Object Name	Field Name	Data Type
Semester	Semester Name Semester Name name	Text (30) Text (80)
Candidate	Candidate Name Candidate Id Candidate name Candidate candidate marks Semester name	Text (30) Text (30) Text (80) Number(18,0) Text (30)
Course details	Course name Course id Course details name	Text (30) Text (30) Text (80)
Lecturer details	Course id Lecturer details Lecturer name Lecturer id	Text (30) Text (80) Text (30) Text (30)
Internal results	Internal results details Course id Candidate id Marks	Text (80) Text (30) Text (30) Number(2,0)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Deleted Fields
Field Dependencies
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FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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Course Name
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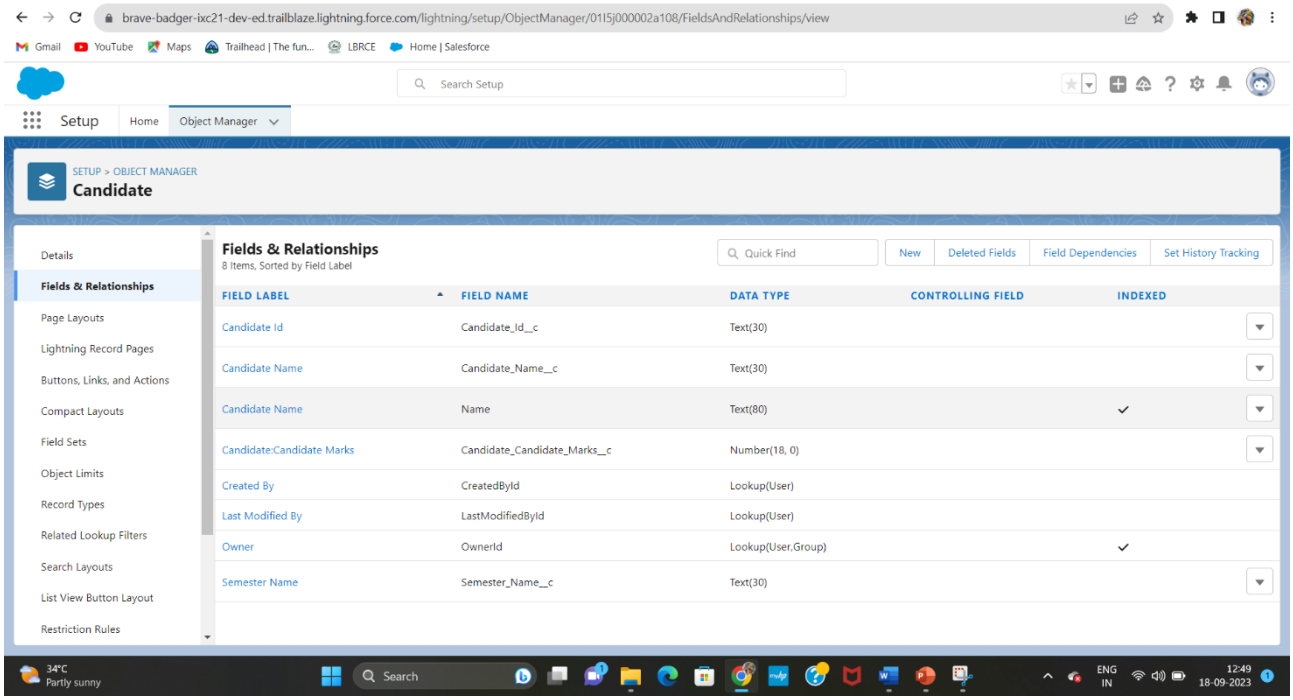
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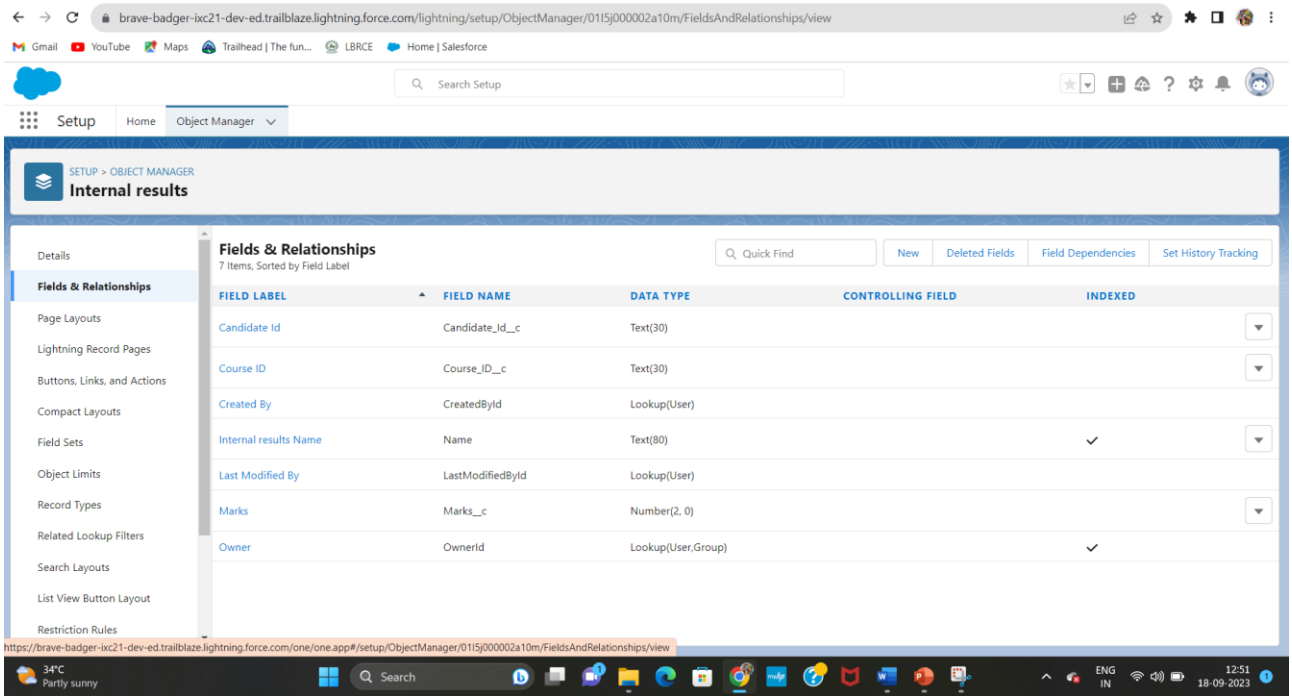
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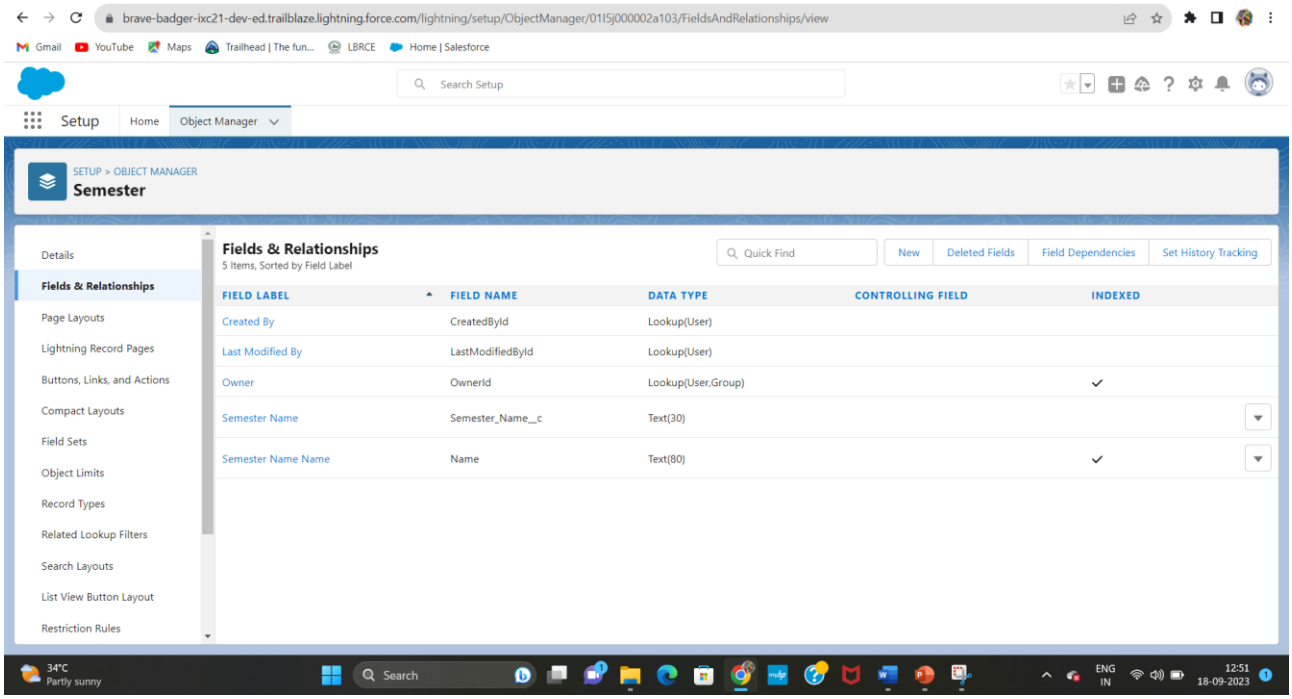
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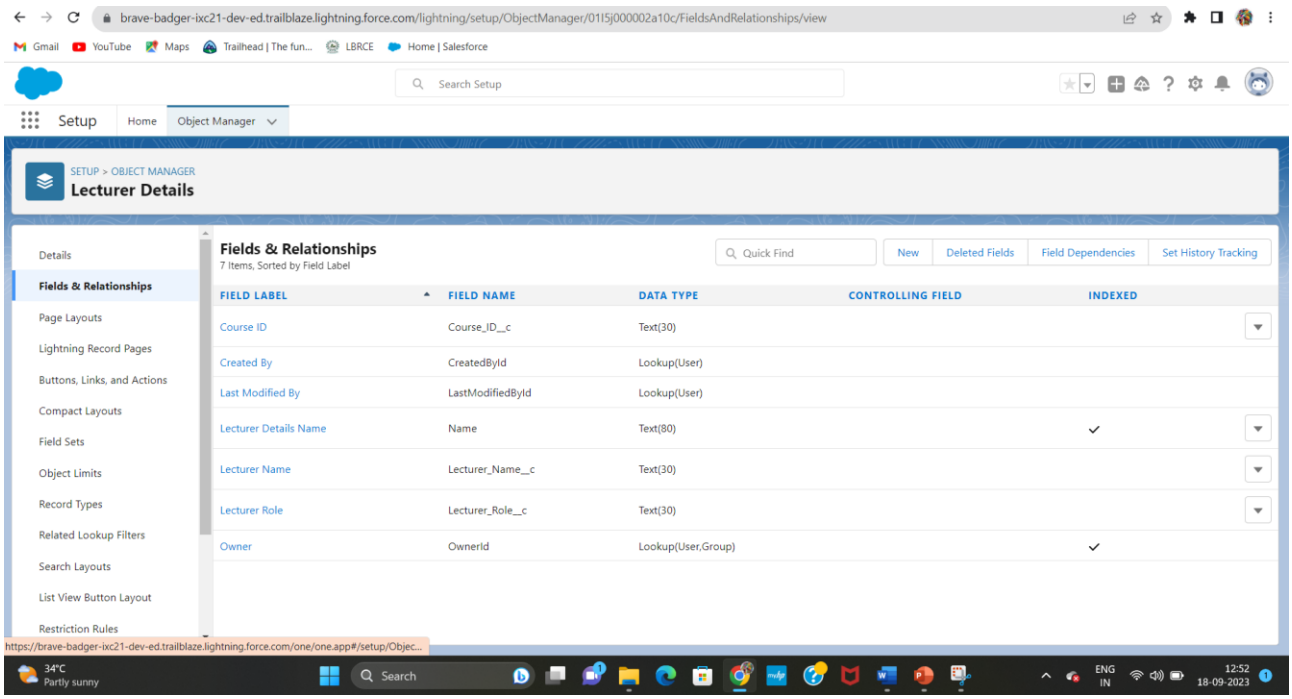
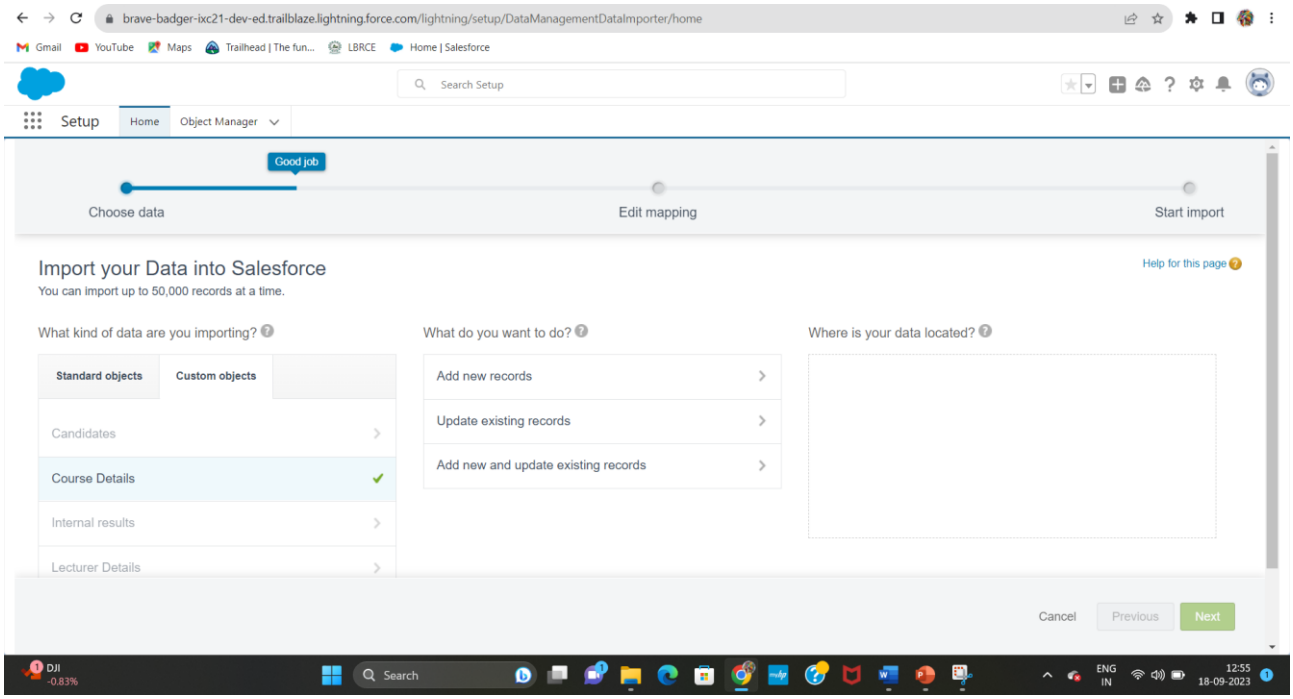
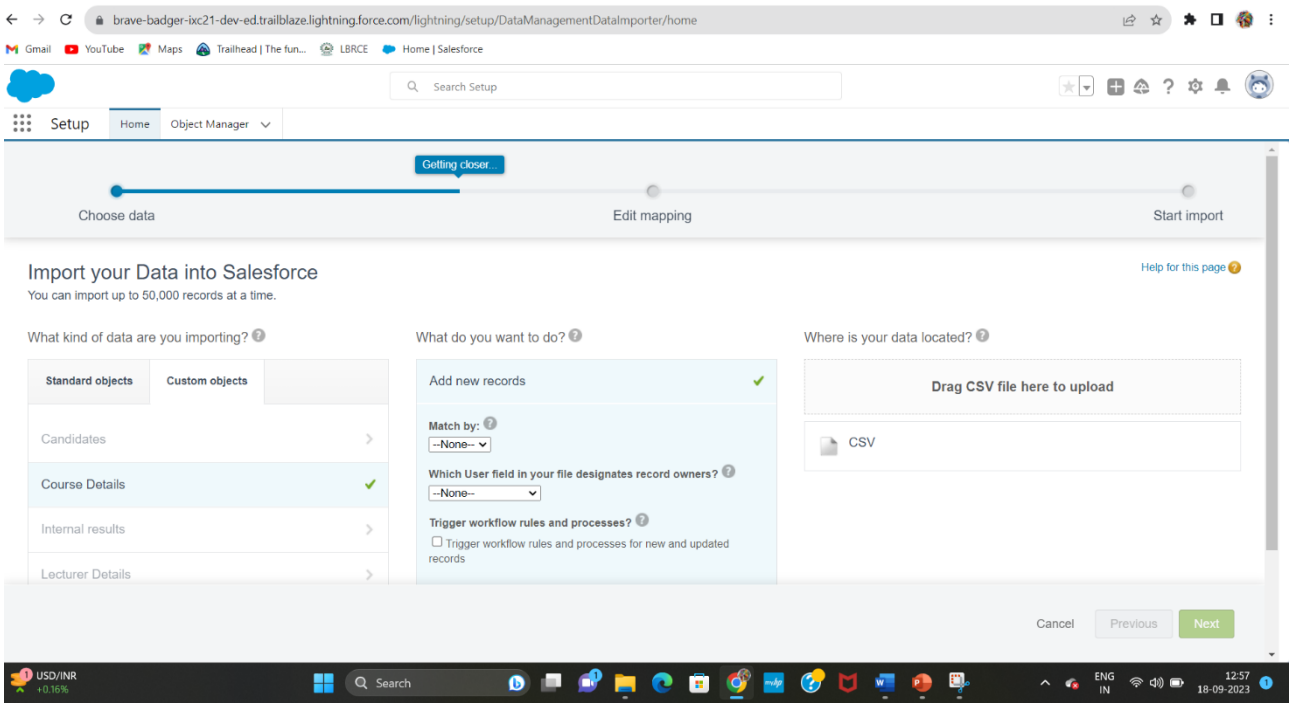
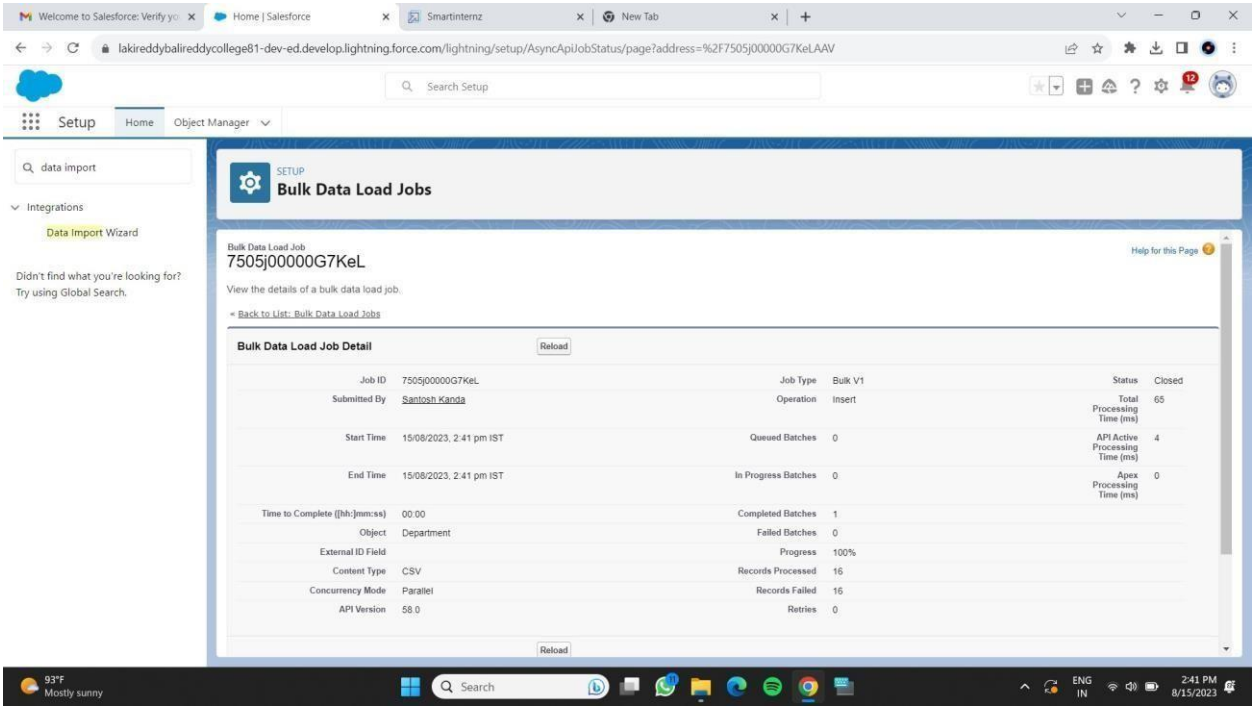
18-09-2023


brave-badger-ixc21-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01I5j000002a10c/FieldsAndRelationships/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lecturer Details
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Course ID
Course_ID__c
Text(30)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Lecturer Details Name
Name
Text(80)
Lecturer Name
Lecturer_Name__c
Text(30)
Lecturer Role
Lecturer_Role__c
Text(30)
Owner
OwnerId
Lookup(User,Group)

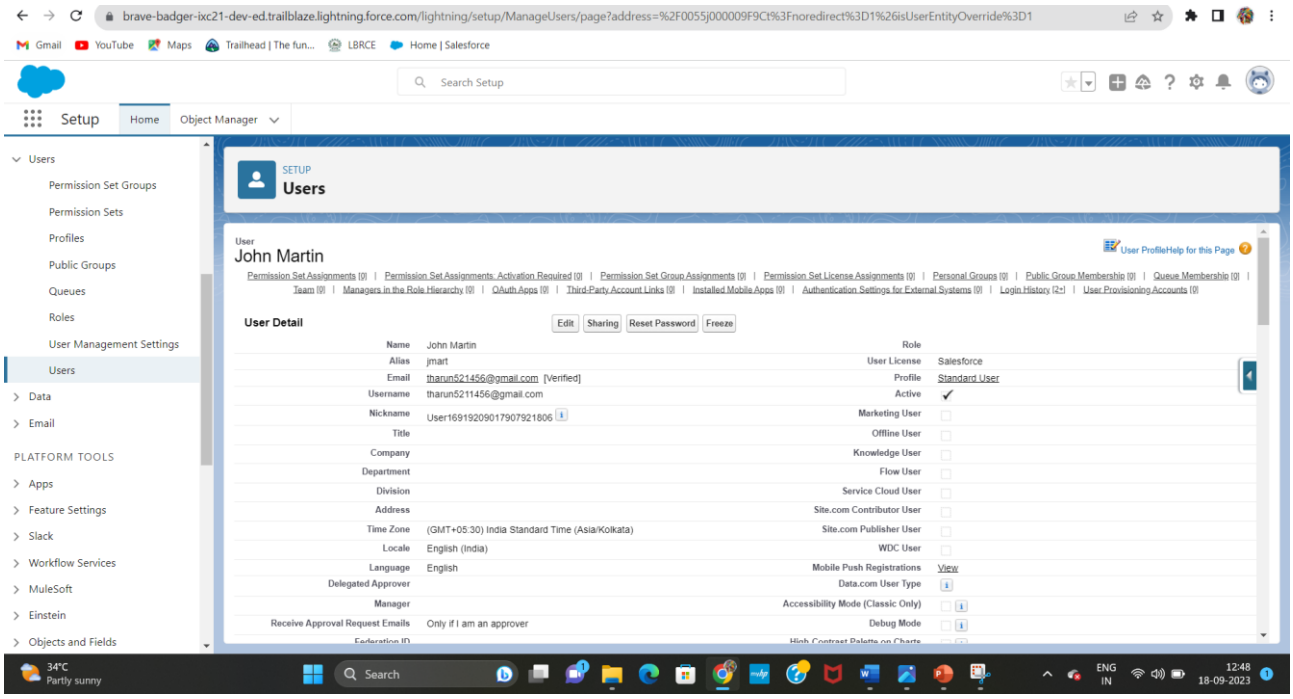
Data Import


brave-badger-ixc21-dev-ed.trailblaze.lightning.force.com/lightning/setup/DataManagementDataImporter/home
Setup
Home
Object Manager
Good job
Choose data
Edit mapping
Start import
Import your Data into Salesforce
You can import up to 50,000 records at a time.
Help for this page
What kind of data are you importing?
What do you want to do?
Where is your data located?
Standard objects
Custom objects
Candidates
Course Details
Internal results
Lecturer Details
Add new records
Update existing records
Add new and update existing records
Cancel
Previous
Next

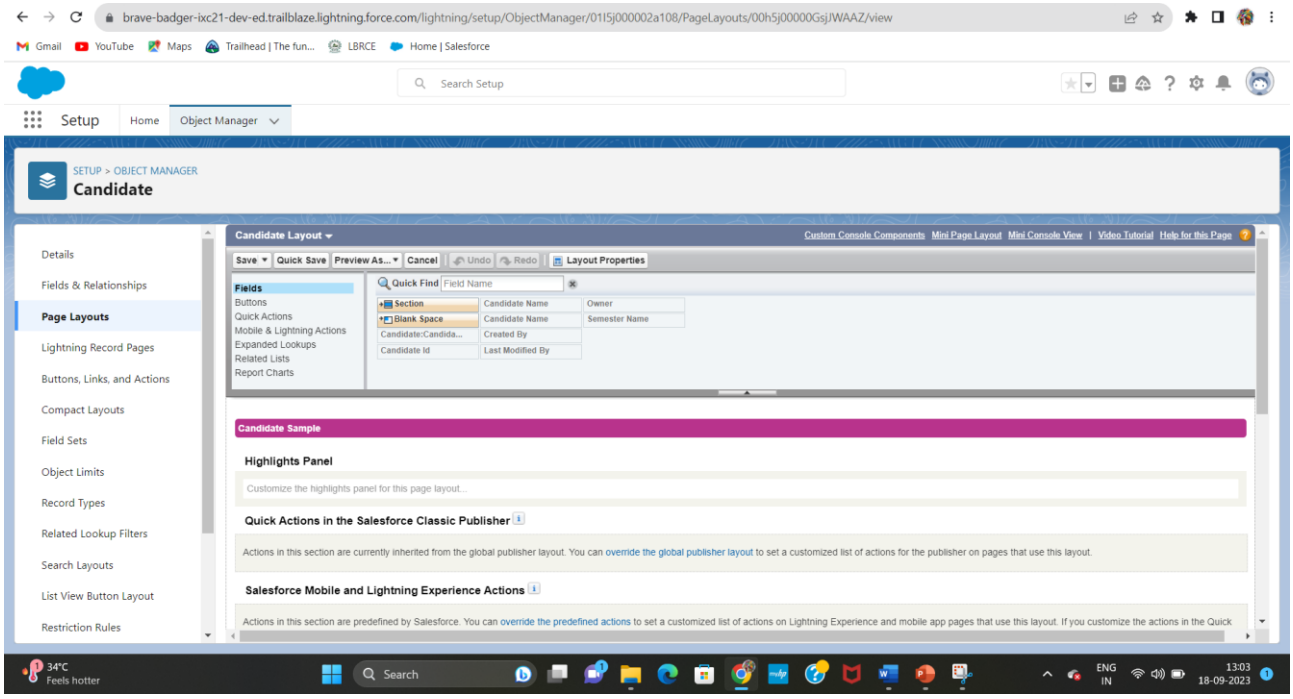

brave-badger-ixc21-dev-ed.trailblaze.lightning.force.com/lightning/setup/DataManagementDataImporter/home
Setup
Home
Object Manager
Getting closer...
Choose data
Edit mapping
Start import
Import your Data into Salesforce
You can import up to 50,000 records at a time.
Help for this page
What kind of data are you importing?
What do you want to do?
Where is your data located?
Standard objects
Custom objects
Candidates
Course Details
Internal results
Lecturer Details
Add new records
Match by:
--None--
Which User field in your file designates record owners?
--None--
Trigger workflow rules and processes?
Trigger workflow rules and processes for new and updated records
Drag CSV file here to upload
CSV
Cancel
Previous
Next


lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/AsyncApiJobStatus/page?address=%2F7505j00000G7KeLAAV
Setup
Home
Object Manager
data import
Integrations
Data Import Wizard
Didn't find what you're looking for?
Try using Global Search.
SETUP
Bulk Data Load Jobs
Bulk Data Load Job
7505j00000G7KeL
View the details of a bulk data load job.
Back to List: Bulk Data Load Jobs
Help for this Page
Bulk Data Load Job Detail
Reload
Job ID 7505j00000G7KeL
Submitted By Santosh Kanda
Start Time 15/08/2023, 2:41 pm IST
End Time 15/08/2023, 2:41 pm IST
Time to Complete ([hh:]mm:ss) 00:00
Object Department
External ID Field
Content Type CSV
Concurrency Mode Parallel
API Version 58.0
Job Type Bulk V1
Operation Insert
Queued Batches 0
In Progress Batches 0
Completed Batches 1
Failed Batches 0
Progress 100%
Records Processed 16
Records Failed 16
Retries 0
Status Closed
Total Processing Time (ms) 65
API Active Processing Time (ms) 4
Apex Processing Time (ms) 0
Reload

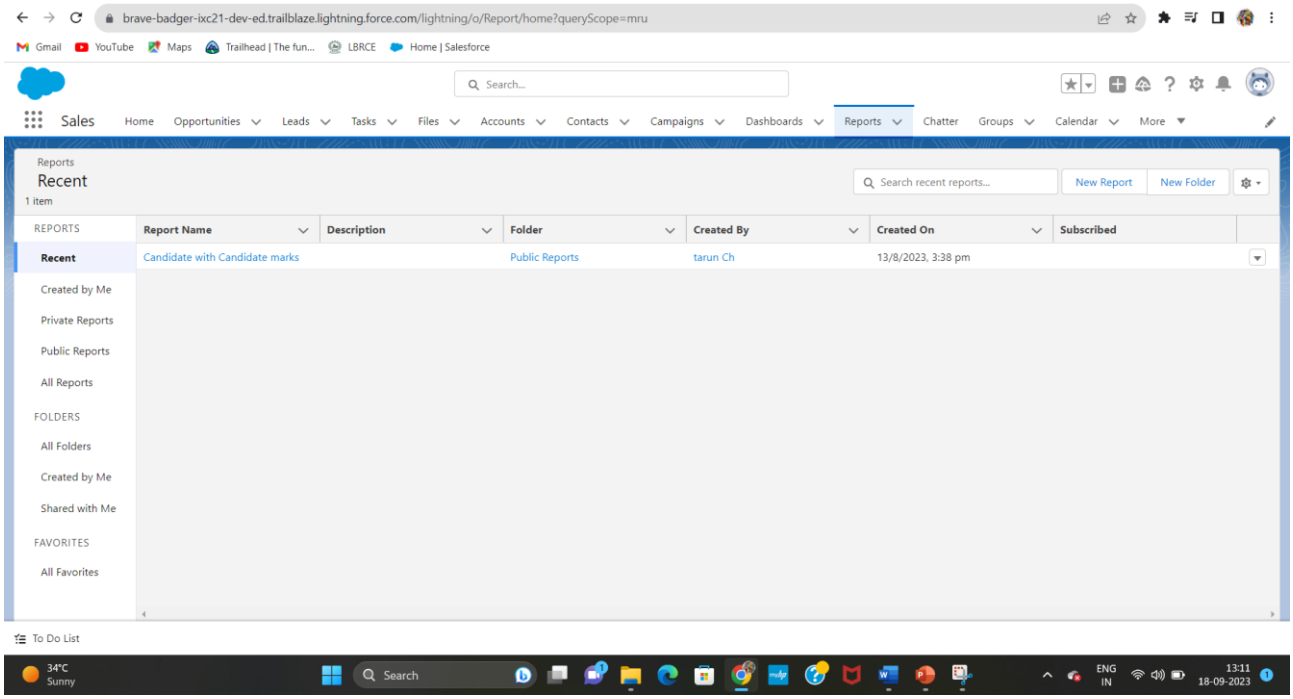
Creation of User



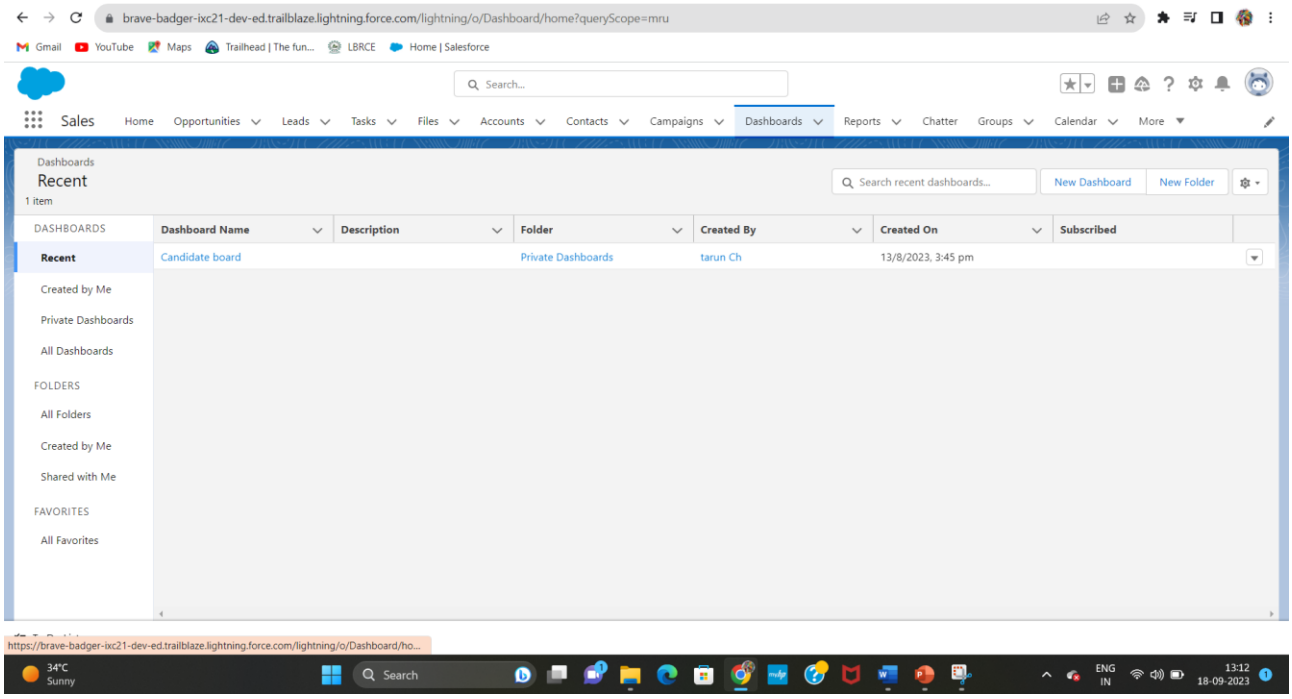
Customization of Candidate object Page Layout

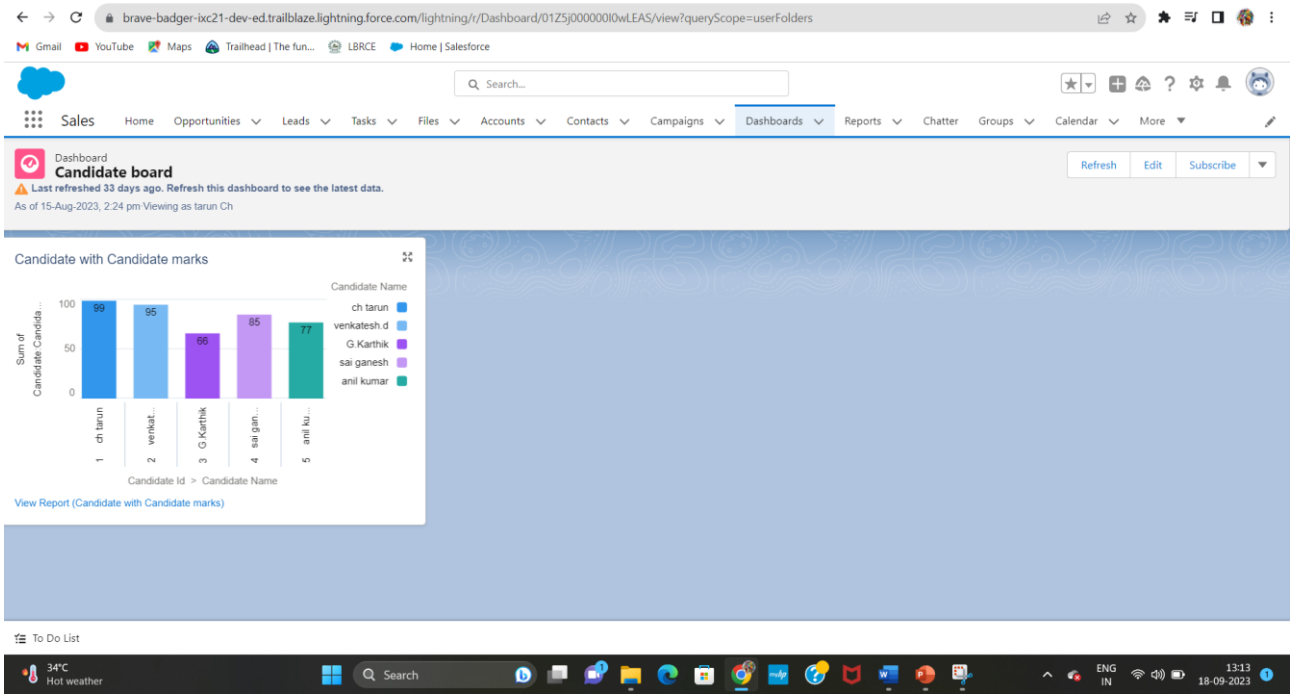


Creation of Report

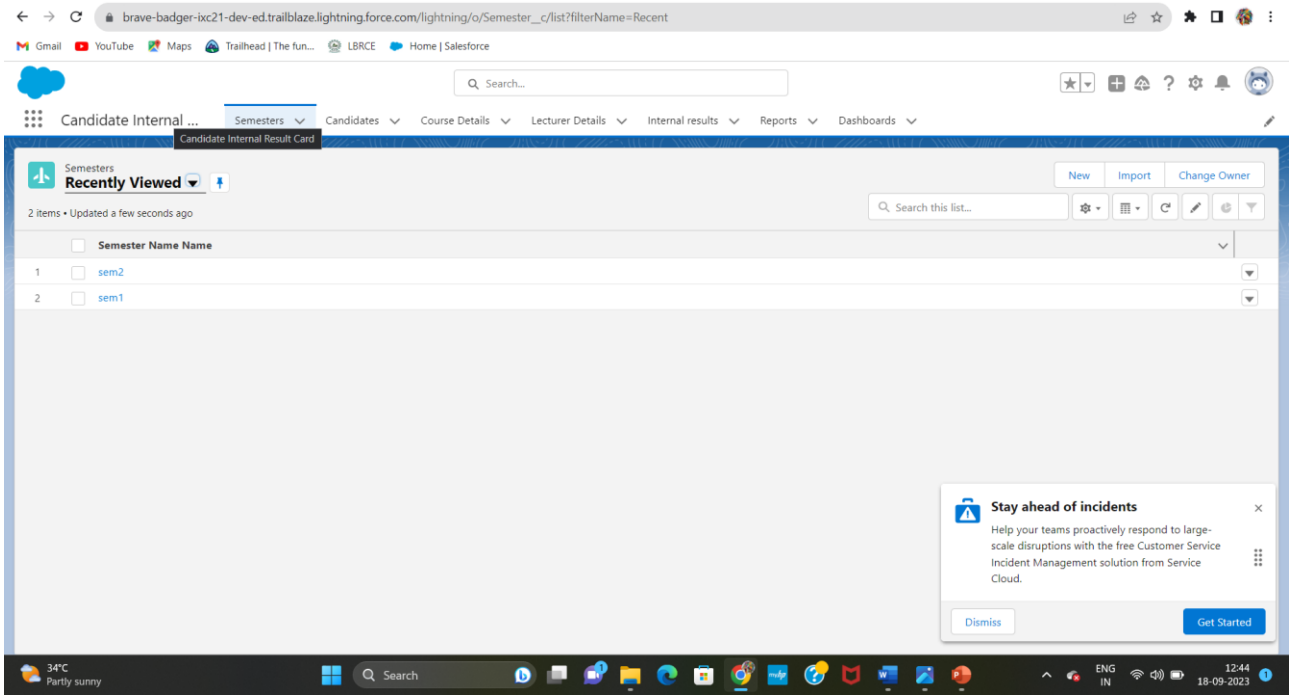


Creation of Dashboard





Overall interface



3.2 Advantages

- The process is tedious and time-consuming task.
- Easiest way.
- Saves time for both employees and managers.
- Reduces the workload.
- The entire process is digitized and streamlined.
- Increased Transparency.
- Provides greater control and security over employee travel.

3.3 DISADVANTAGES

- The process includes too many levels of approval that makes confusing.
- Regular Maintenance.
- Internet Connection problem is there.
- Poor Connection leads to trouble and anxiety.
- Lack of leadership.
- It can be costly sometimes.
- Poor communication.

3.4 APPLICATIONS

The application ensures that Integrating internal candidate marks into a CRM system has multifaceted applications across talent management and HR functions. It empowers organizations to make data-driven recruitment decisions, nurture talent pipelines, streamline performance appraisals, and support training and development initiatives. This approach also enhances succession planning, ensures compliance and auditing readiness, optimizes resource allocation, and fosters employee engagement. Overall, it transforms HR processes, promoting efficiency, fairness, and strategic decision-making throughout the employee lifecycle.

3.5 CONCLUSION

In this project, we built a Results Tracking a Candidate For Internal Results application. implementing a CRM system for tracking internal candidate results is a strategic investment that optimizes talent management. integrating internal candidate marks storage into a CRM system streamlines talent management processes, enhances decision-making, and supports candidate profiling and career development. It creates a centralized repository for assessment data, enabling data-driven hiring and efficient talent optimization within your organization.

FUTURE SCOPE

- In future it will be really a useful one in the application of candidate internal marks.
- It is trusted to be in future everyone will utilize this.
- The customer will set good service and make it trustworthy.
- Hope it would fulfil all the needs of the users.