

MUTHURANGAM GOVT ARTS AND SCIENCE COLLEGE (A)

VELLORE

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH
INTERNAL MARKS

Submitted by

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The following steps are used to create the app:

Milestone1:

Step 1:

To create the developer account first so,go to the **developers salesforces.com** click the page will be opened. Enter the required details like as name, email etc...

The email will be received with user name.

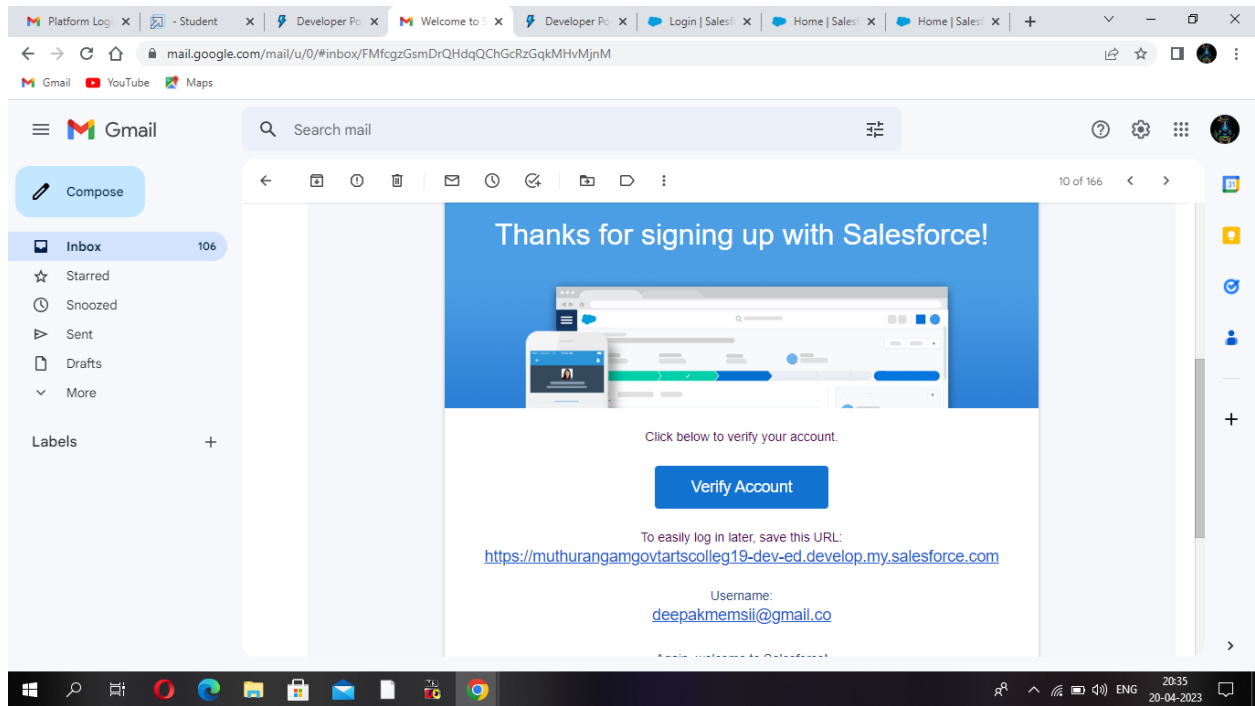
Step 2:

Opened the received mail click the verify option and **generate the strong password**.

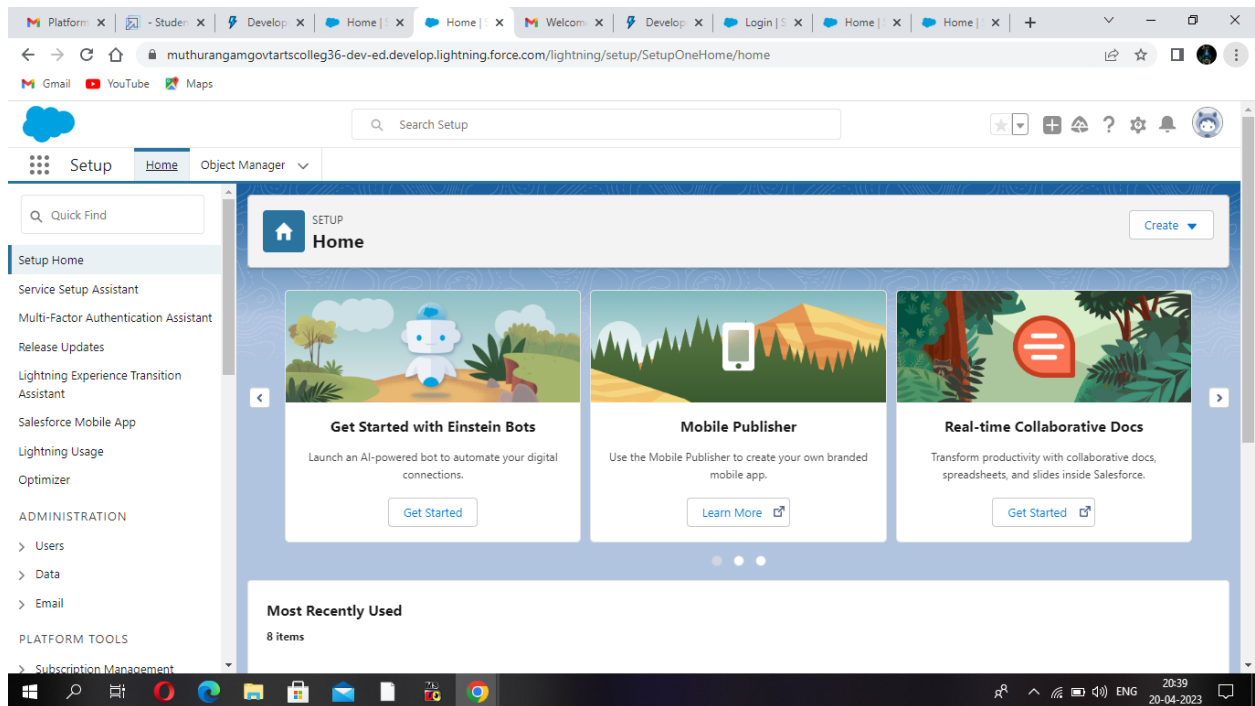
This will be shown in the fig(1).

Step 3:

Now go to the **salesforces.com** and enter the valid username and password the new setup tab will be opened it will be shown in fig(2).



fig(1)



fig(2)

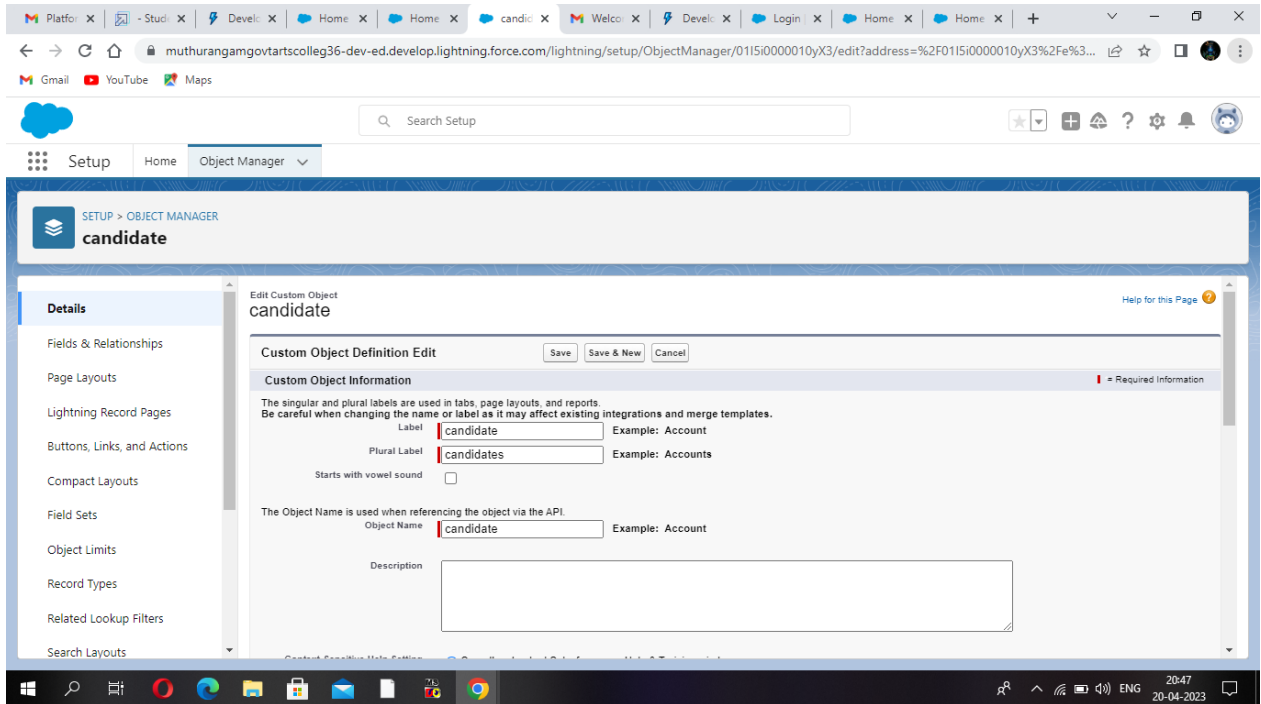
Milestone:2

Step 4:

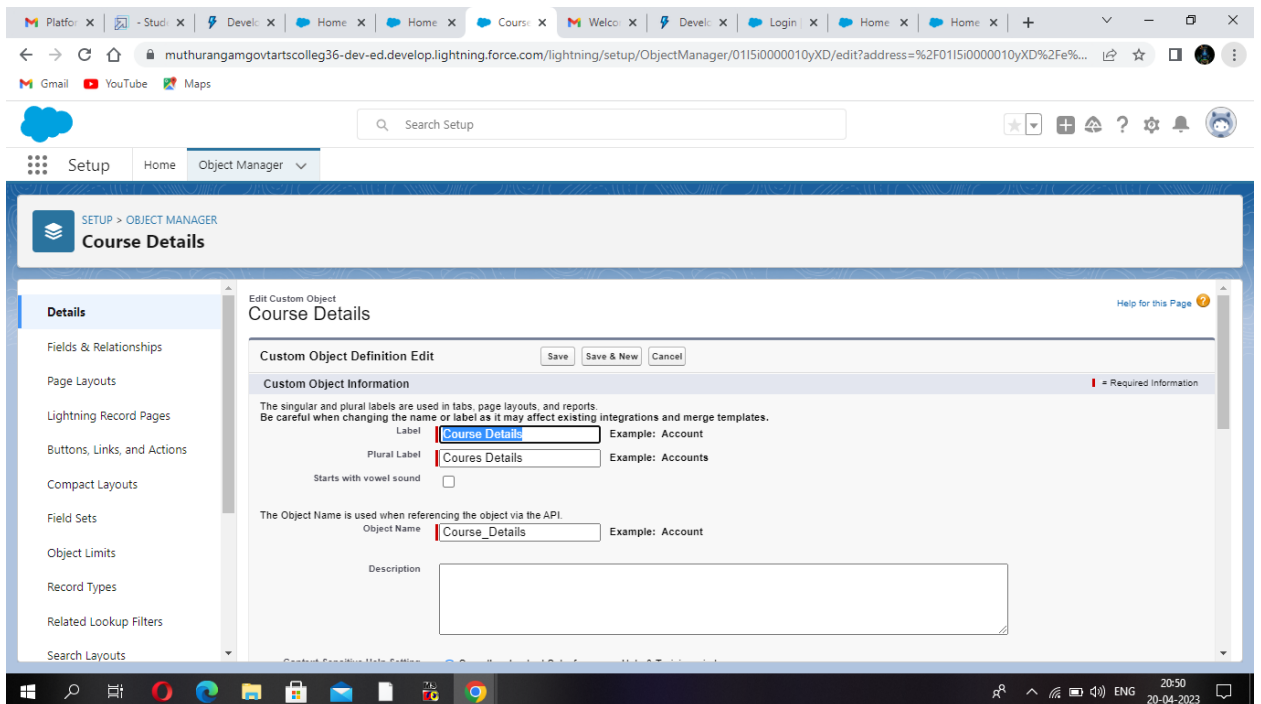
Now click the **object manager** on our left side create new custom object. The objects name are Semester, Candidate, Course Details, Lecturer Details and Internal Results these are shown fig(3). Now go to the **fields and relationship** option select new option and custom field will be opened we will entered the field name like as Semester name , Courses, Internal results,Marks etc... these are shown in the figures

The screenshot displays the Salesforce 'New Custom Object' setup page. The browser's address bar shows the URL: `muthurangamgovtartscolleg36-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. A yellow warning message at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. Below the warning, the 'Custom Object Definition Edit' form is visible. The form has a 'Custom Object Information' section with the following fields: 'Label' (semester), 'Plural Label' (semesters), 'Object Name' (semester), and 'Description'. The 'Label' and 'Plural Label' fields have red exclamation marks indicating required information. The 'Object Name' field also has a red exclamation mark. The 'Description' field is empty. The 'Starts with vowel sound' checkbox is unchecked. The 'Example' text next to the 'Label' field is 'Account', and next to the 'Plural Label' field is 'Accounts'. The 'Example' text next to the 'Object Name' field is 'Account'. The 'Save', 'Save & New', and 'Cancel' buttons are at the top right of the form.

fig(3)



fig(3)



fig(4)

Platform | - St | Dev | Hor | Obj | can | Wei | De | Log | Hor | Hor | +

muthurangamgovtartscolleg36-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i0000010yX3/FieldsAndRelationships/new

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
candidate

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

candidate

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Field Label candidate

Display Format {0} Example: A-(0000) What Is This?

Starting Number 1 250 5000

☒ Generate Auto Number for existing records

Field Name candidate

Description

Help Text

21:03
20-04-2023

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Course 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

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label

Display Format Example: A-(0000) [What Is This?](#)

Starting Number

☒ Generate Auto Number for existing records

Field Name

Description

Help Text

Previous Next Cancel

Platform X | - St: X | Dev X | Hor X | Obj X | Hor X | Inte X | Wei X | De: X | Log X | Hor X | Hor X | +

muthurangamgovtartscolleg36-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i0000010yXS/FieldsAndRelationships/new

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Internal Result

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

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label

Display Format Example: A-(0000) [What Is This?](#)

Starting Number

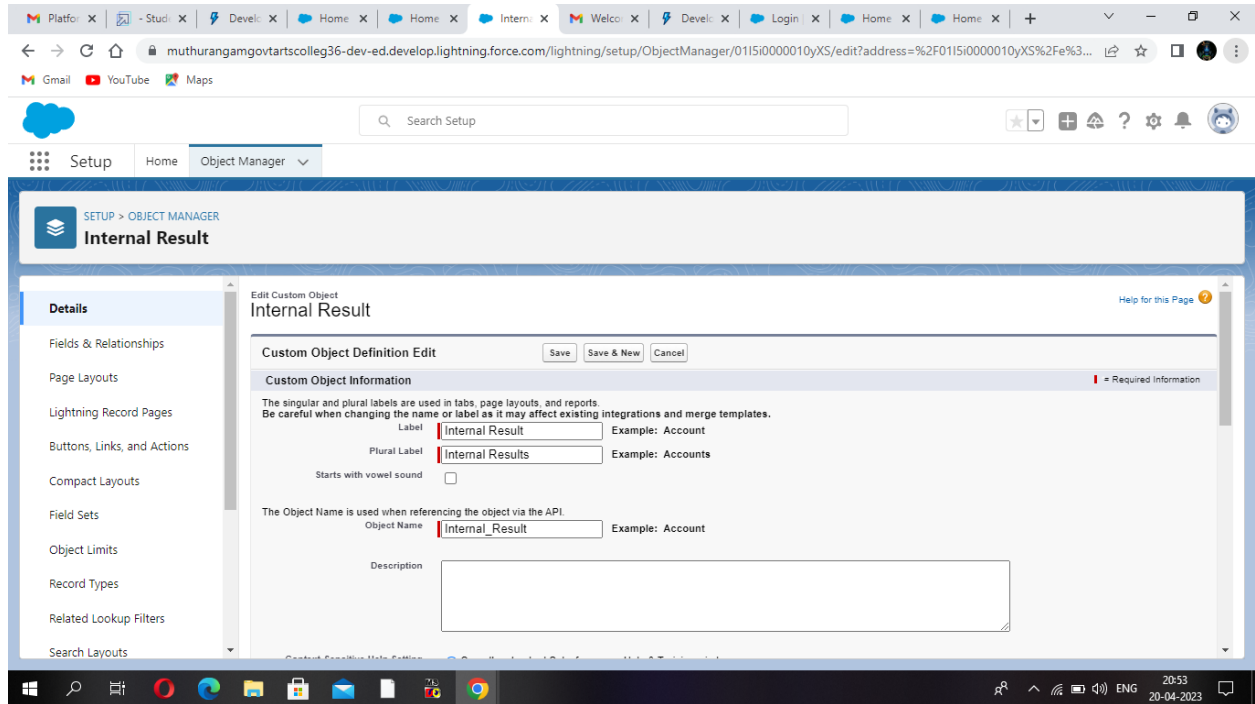
☒ Generate Auto Number for existing records

Field Name

Description

Help Text

Previous Next Cancel



Milestone:3

LIGHTING APP:

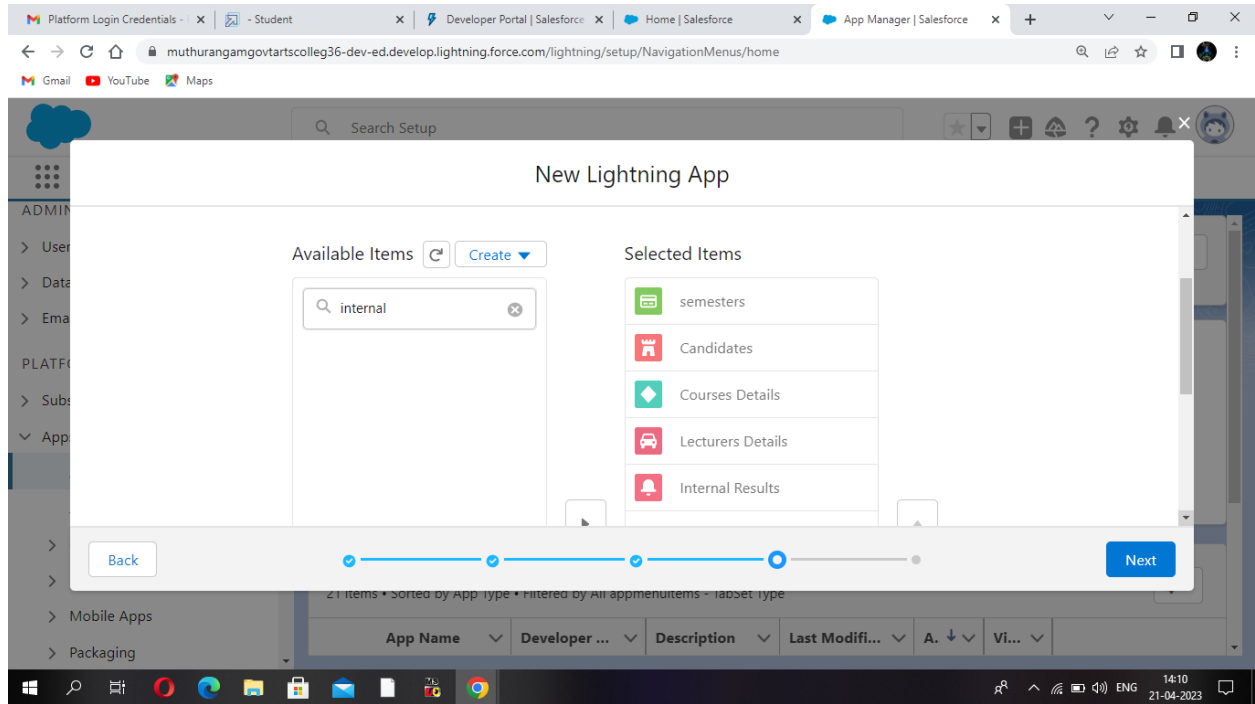
Create theCandidate Internal Result card app:

Step 5:

To select the quick find and search **app manager** select it and click the **New Lightning app** enter the app name as Candidate Internal Result Card and click next as default option. From available items select the our custom object search easily in navigation box. Move then to **selected items**. It will shown in the figure.

Step 6:

Selected the users now so click the **System Administrator** user to move selected items and click save and finish shown in the figure, now check the app so go to the app launcher search the app name.



Milestone:8

USERS:

Step 7:

From the setup menu quick find box search **users** and select it. Click the **new user**. Fill the required details the mail will be received. And **reset** the password the users will be created it. It will shown in the figure.

Platform Login Creden x Naanmudhalvan - Sm x Developer Portal | Sal x Home | Salesforce x Users | Salesforce x Login | Salesforce x

muthurangamgovtartscolleg36-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055i000006xQH3%3Fnoredirect%3D1...

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

Einstein

Objects and Fields

SETUP Users

User Detail Edit Sharing Reset Password Freeze

Name	Jhon Martin	Role	
Alias	jmart	User License	Salesforce
Email	deepakmemsli@gmail.com	Profile	Minimum Access - Salesforce
Username	depakmemsli@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1682072765423282844	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

Windows Taskbar: 17:02 21-04-2023

Platform Login Creden x Naanmudhalvan - Sm x Developer Portal | Sal x Home | Salesforce x Users | Salesforce x Login | Salesforce x

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Gmail YouTube Maps

Search Setup

Setup Home Object Manager

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

Einstein

Objects and Fields

Events

SETUP Users

Company	Knowledge User	<input type="checkbox"/>
Department	Flow User	<input type="checkbox"/>
Division	Service Cloud User	<input type="checkbox"/>
Address	Site.com Contributor User	<input type="checkbox"/>
Time Zone	Site.com Publisher User	<input type="checkbox"/>
Locale	WDC User	<input type="checkbox"/>
Language	Mobile Push Registrations	View
Delegated Approver	Data.com User Type	i
Manager	Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Debug Mode	<input type="checkbox"/> i
Federation ID	High-Contrast Palette on	<input type="checkbox"/> i

Windows Taskbar: 17:02 21-04-2023

Platform Login Creden xNaanmudhalvan - Sm xDeveloper Portal | Sal xHome | Salesforce xUsers | Salesforce xLogin | Salesforce x

muthurangamgovtartscolleg36-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055i000006xQH3%3Fnoredirect%3D1...

GmailYouTubeMaps

Search Setup

Setup

Home

Object Manager

User Management Settings

Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

> Slack

> MuleSoft

> Einstein

> Objects and Fields

> Events

SETUP

Users

Company	Knowledge User	<input type="checkbox"/>
Department	Flow User	<input type="checkbox"/>
Division	Service Cloud User	<input type="checkbox"/>
Address	Site.com Contributor User	<input type="checkbox"/>
Time Zone	Site.com Publisher User	<input type="checkbox"/>
Locale	WDC User	<input type="checkbox"/>
Language	Mobile Push Registrations	View
Delegated Approver	Data.com User Type	i
Manager	Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Debug Mode	<input type="checkbox"/> i
Federation ID	High-Contrast Palette on	<input type="checkbox"/> i

17:02

21-04-2023

Platform Login Creden x Naanmudhalvan - Sm x Developer Portal | Sal x Home | Salesforce x Users | Salesforce x Login | Salesforce x + v - x

muthurangamgovtartscolleg36-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055i000006xQH3%3Fnoredirect%3D1...

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Users

- Data
- Email

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft
- Einstein
- Objects and Fields
- Events
- Process Automation

SETUP Users

App Registration: One-Time Password Authenticator	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	Allow Forecasting	<input type="checkbox"/>

[Generate]

Call Center

Phone

Extension

Fax

Mobile

17:02 21-04-2023

Platform Login Creden x Naanmudhalvan - Sm x Developer Portal | Sal x Home | Salesforce x Users | Salesforce x Login | Salesforce x + v - x

muthurangamgovtartscolleg36-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055i000006xQH3%3Fnoredirect%3D1...

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Users

- Data
- Email

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft
- Einstein
- Objects and Fields
- Events
- Process Automation

SETUP Users

Mobile

Email Encoding Unicode (UTF-8)

Employee Number

Used Data Space 0 B [View]

Used File Space 0 B [View]

Last Login

Last Password Change or Reset 21/04/2023, 4:01 pm

Failed Login Attempts 0

Individual

Created By Deepak M. 21/04/2023, 4:01 pm

Modified By Deepak M. 21/04/2023, 4:01 pm

Edit Sharing Reset Password Freeze

Permission Set Assignments Edit Assignments

Permission Set Assignments Help

17:02 21-04-2023

Milestone :5

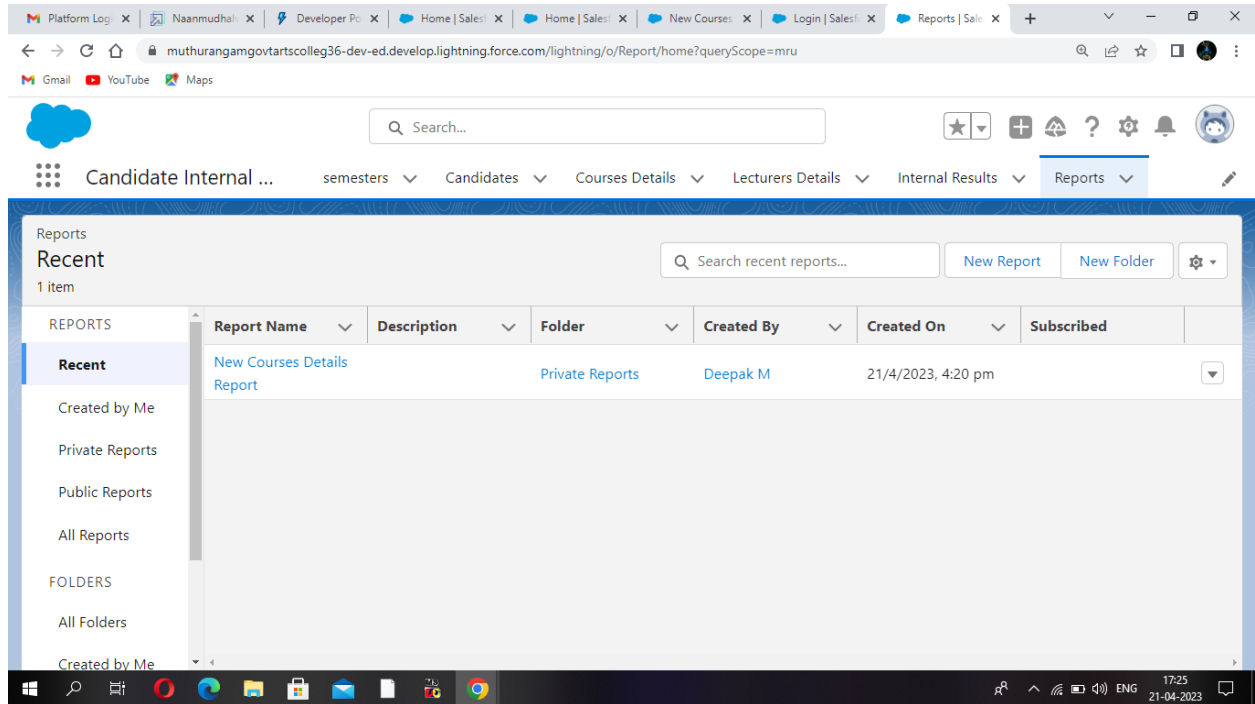
REPORTS:

Step 8:

In the app launcher search the report and click it. On our right side **new report** option is available click it. Select a report in a find box, the reports are in the object name like as semester, Lecturer Details etc.... Click it, on our right side **strat report** option will be shown click it and finish the reports. Click the save & run option. The reports are shown in the figure.

The screenshot displays the Salesforce Reports interface. At the top, there's a navigation bar with tabs for 'Candidate Internal ...', 'semesters', 'Candidates', 'Courses Details', 'Lecturers Details', 'Internal Results', and 'Reports'. The 'Reports' tab is active. Below the navigation bar, the 'Reports' section is titled 'Recent' and shows '1 item'. A search bar for 'Search recent reports...' is present, along with 'New Report' and 'New Folder' buttons. A table lists the reports with columns: 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The table contains one entry: 'New Courses Details Report' under the 'Recent' folder, created by 'Deepak M' on '21/4/2023, 4:20 pm'. On the left side, there's a sidebar with 'REPORTS' and 'FOLDERS' sections. Under 'REPORTS', there's a 'Recent' section with a list of reports including 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. Under 'FOLDERS', there's a list including 'All Folders' and 'Created by Me'.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Courses Details Report		Private Reports	Deepak M	21/4/2023, 4:20 pm	



Milestone:6

DASHBOARDS:

Step 9:

From the setup menu click the **app launcher** and search the dashboards and click on it. On our right side new dashboard is here click it and the dashboard will be opened type the title and select the **vertical add symbol** and select the reports and click save & run option. The dashboards are shown in the figure.

Platform Log x Naanmudhal x Developer Po x Home | Sales x Home | Sales x New Courses x Login | Sales x Boopathi Raj x

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Search...

Candidate Internal ... semesters Candidates Courses Details Lecturers Details Dashboards More

Dashboard

New Accounts Report

Last Activity ↑	Account Owner	Account Name	Billing State/Province	Type
	- Deepak M	GenePoint	CA	Customer - Channel
	- Deepak M	United Oil & Gas, UK	UK	Customer - Direct
	- Deepak M	United Oil & Gas, Singapore	Singapore	Customer - Direct
	- Deepak M	Edge Communications	TX	Customer - Direct
	- Deepak M	Burlington Textiles Corp of America	NC	Customer - Direct

[View Report \(New Accounts Report\)](#)

Windows Taskbar: 17:32 21-04-2023

SUBMITTED TO:

Our Sincere Thanks to

- **SALESFORCE**
- **SMARTBRIDGE**
(Smart Internz)

THANK YOU