IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

INTRODUCTION

OVERVIEW :

PROJECT DESCRIPTION

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 initialised by Candidate for all Internal Results.Now only dean can update the marks after re- evaluation.

PURPOSE

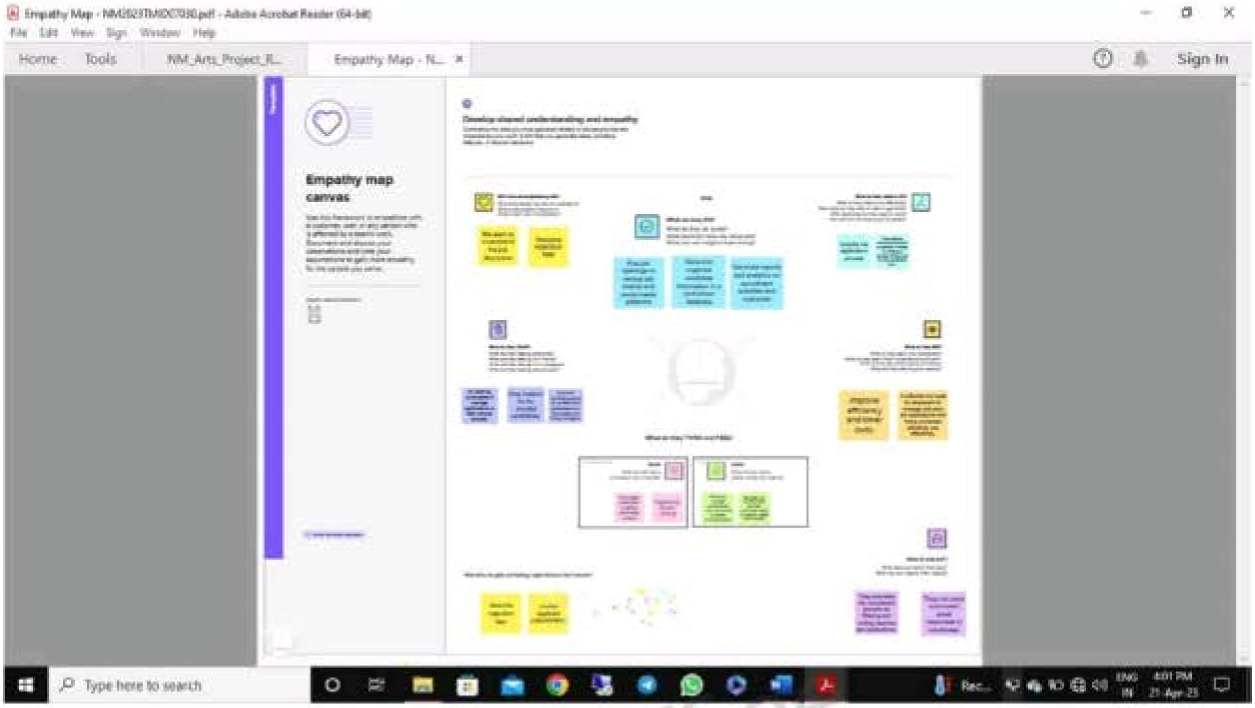
Implementing a CRM system is a value-adding process that can bring great benefits to any business. The ultimate goal is **to improve communication and interaction with real customers and leads, and to maximise their impact on the production process and business figures**.

IMPORTANCE

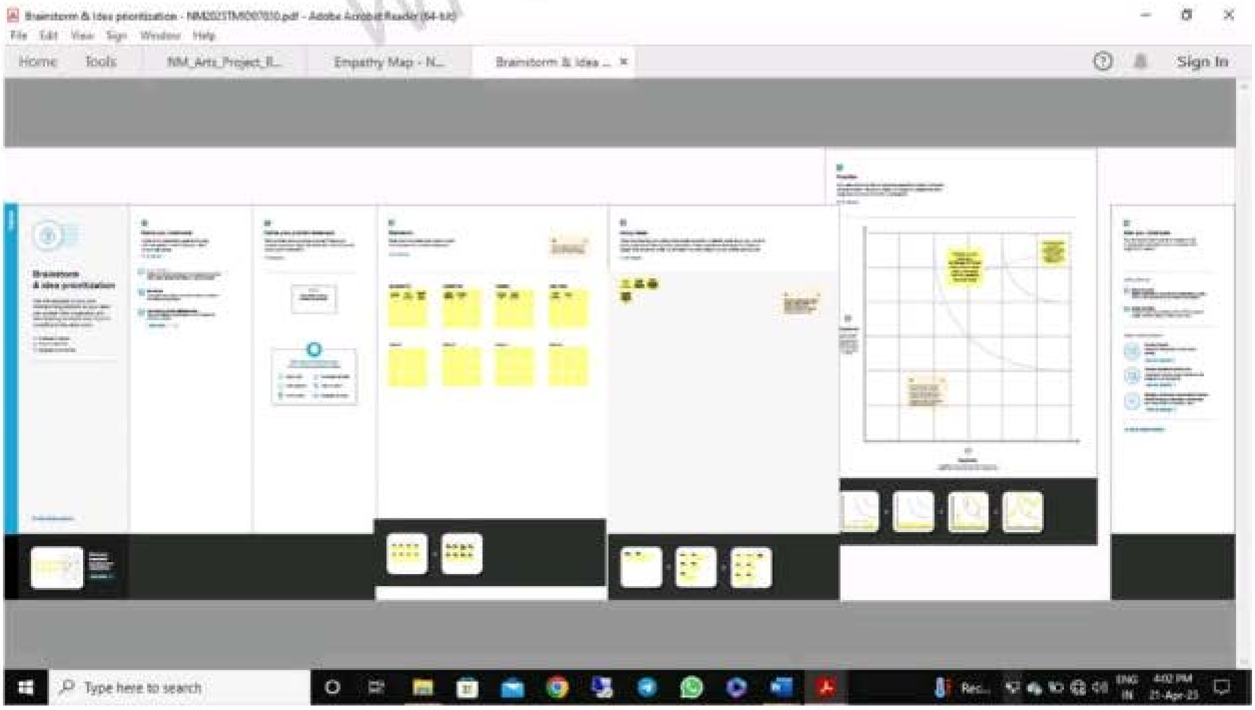
A CRM system can **help educational organisations effectively manage and track leads, resulting in improved enrolment numbers**. Additionally, by personalising communication and providing automated follow-up, educational organisation can build better relationships with students and leads, and keep them engaged over time.

1. Problem Definition & Design Thinking

Empathy Map



Ideation & Brainstorming Map



Implementing CRM for Result tracking of a candidate with internal marks

Milestone-2:Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. 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:

1.Semester
2.Candidate
3.Course Details
4.Lecturer Details
5.Internal results

Activity-1:

To Create an object:

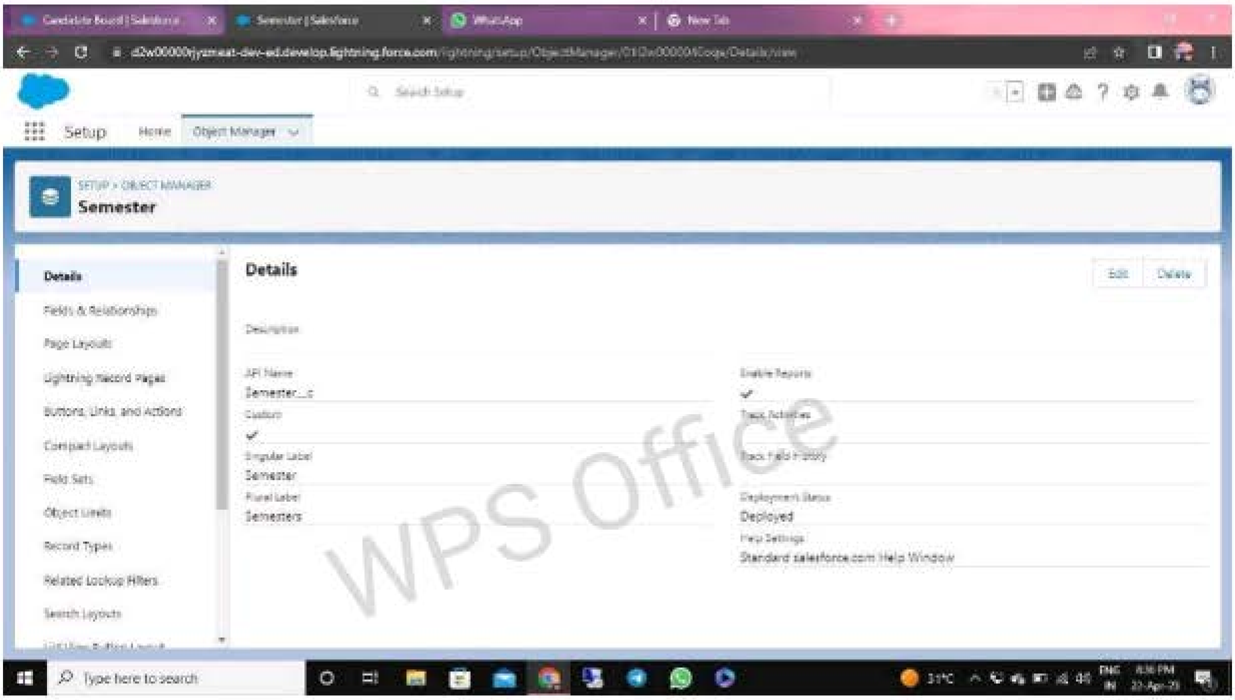
Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e Semester,Candidate,Course Details,Lecturer Details,Internal Results. The below steps will assist you in creating those objects.

- 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.

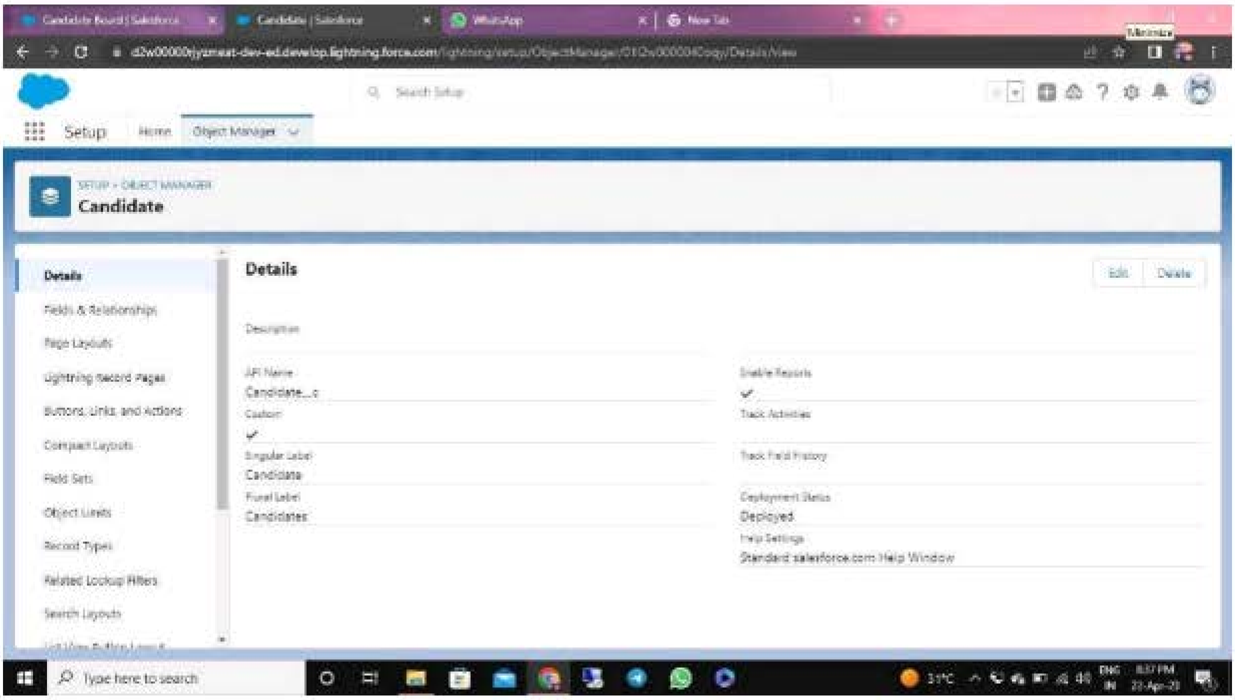
On the Custom Object Definition page, create the object as follows:

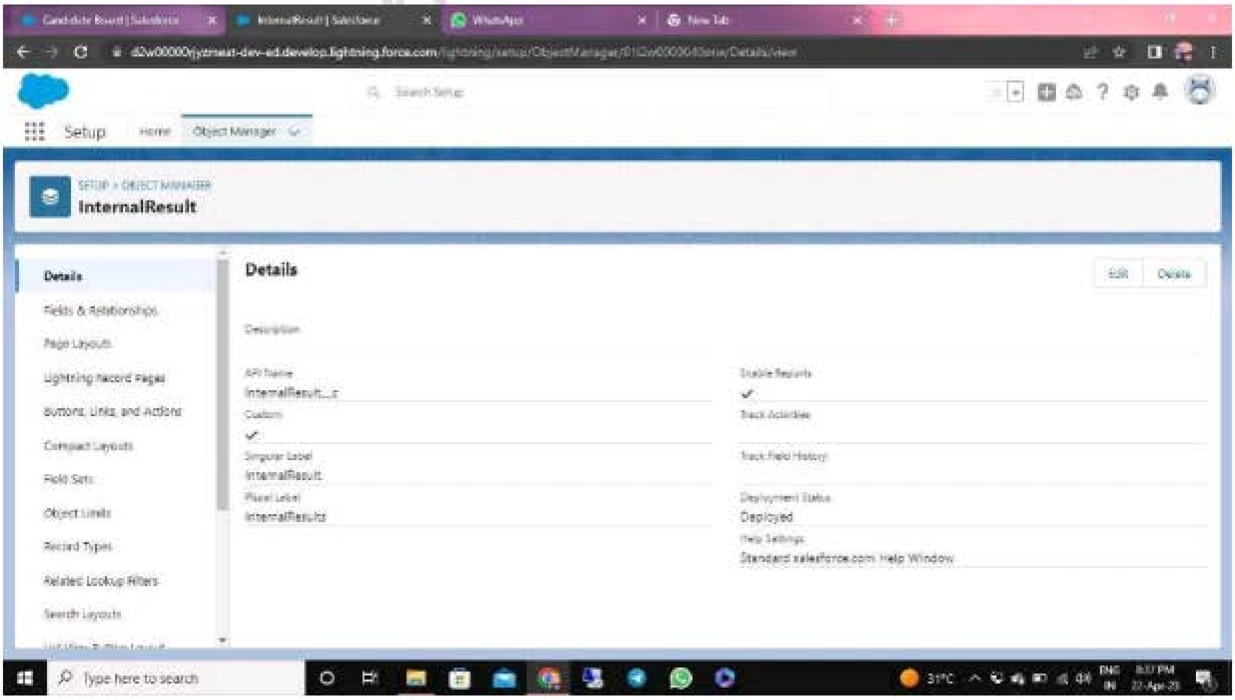
- Label: Semester
- Plural Label: Semesters

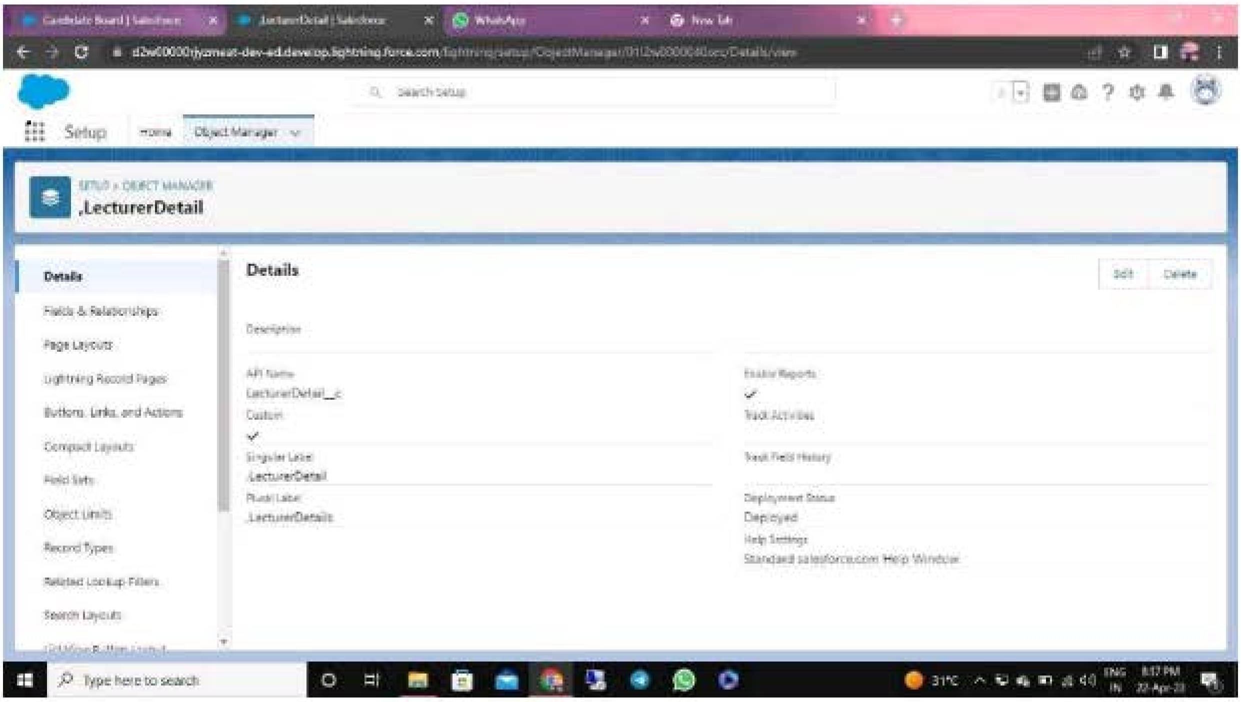
- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

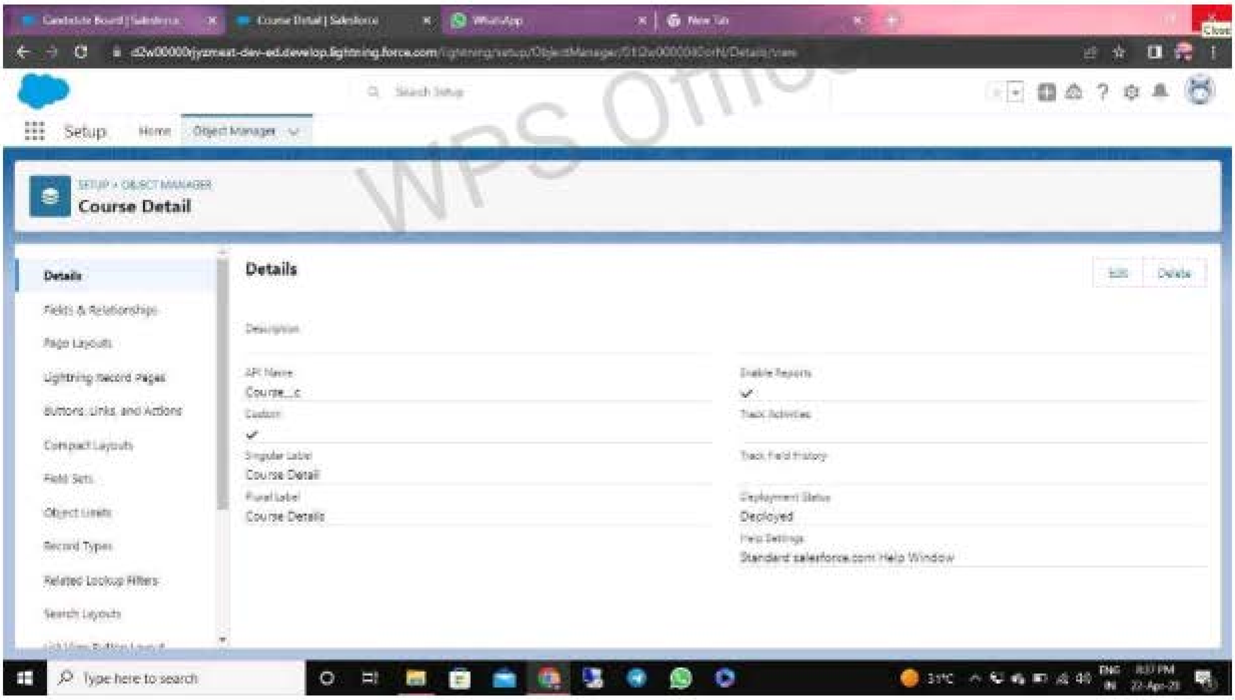


Activity-2: Follow Similar steps to create Candidate,Course Details,Lecturer Details,Internal results Objects.


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
Details
Edit
Delete
Description
API Name
Candidate__c
Custom
Singular Label
Candidate
Plural Label
Candidates
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
Type here to search


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
InternalResult
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
Details
Edit
Delete
Description
API Name
InternalResult__c
Custom
Singular Label
InternalResult
Plural Label
InternalResults
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
Type here to search





Milestone -2:Fields and Relationship

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.

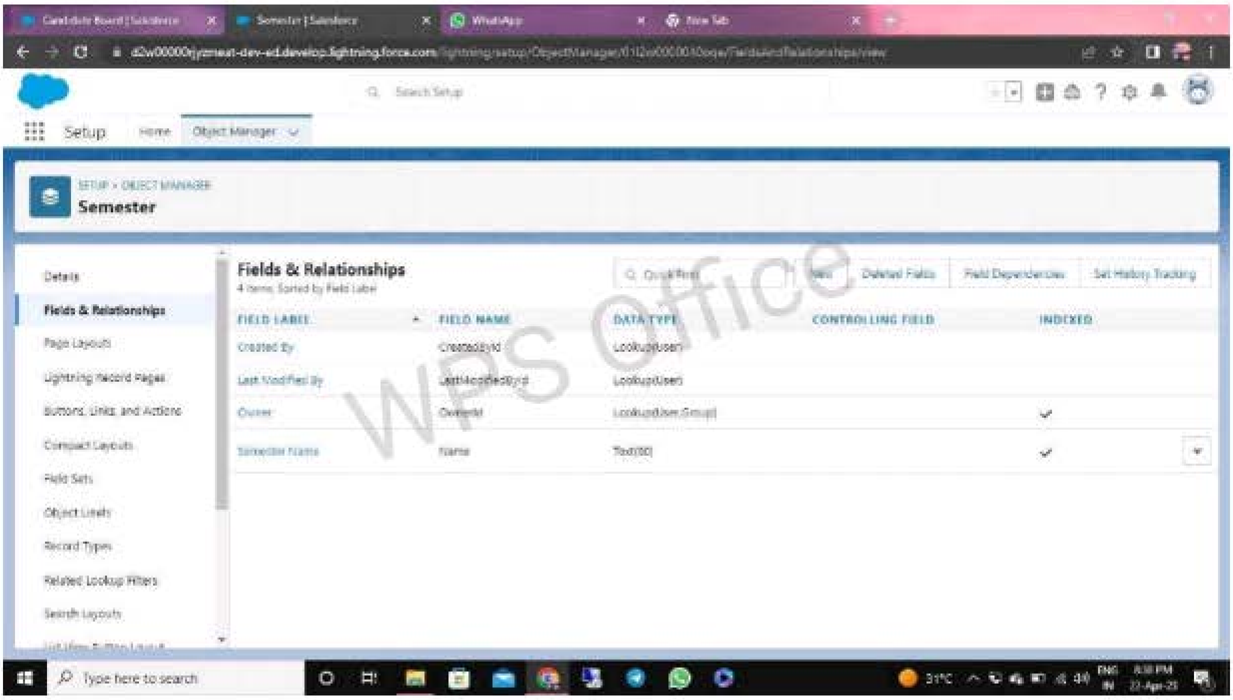
Activity-1:

Creation of fields:

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Semester.
- Select Fields & Relationships from the left navigation, and click

New Now ready to make a custom field. Let's do this!

- Select the Text as the Data Type, then click Next.
- For Field Label, Enter Semester Name.
- Click Next, Next, then Save



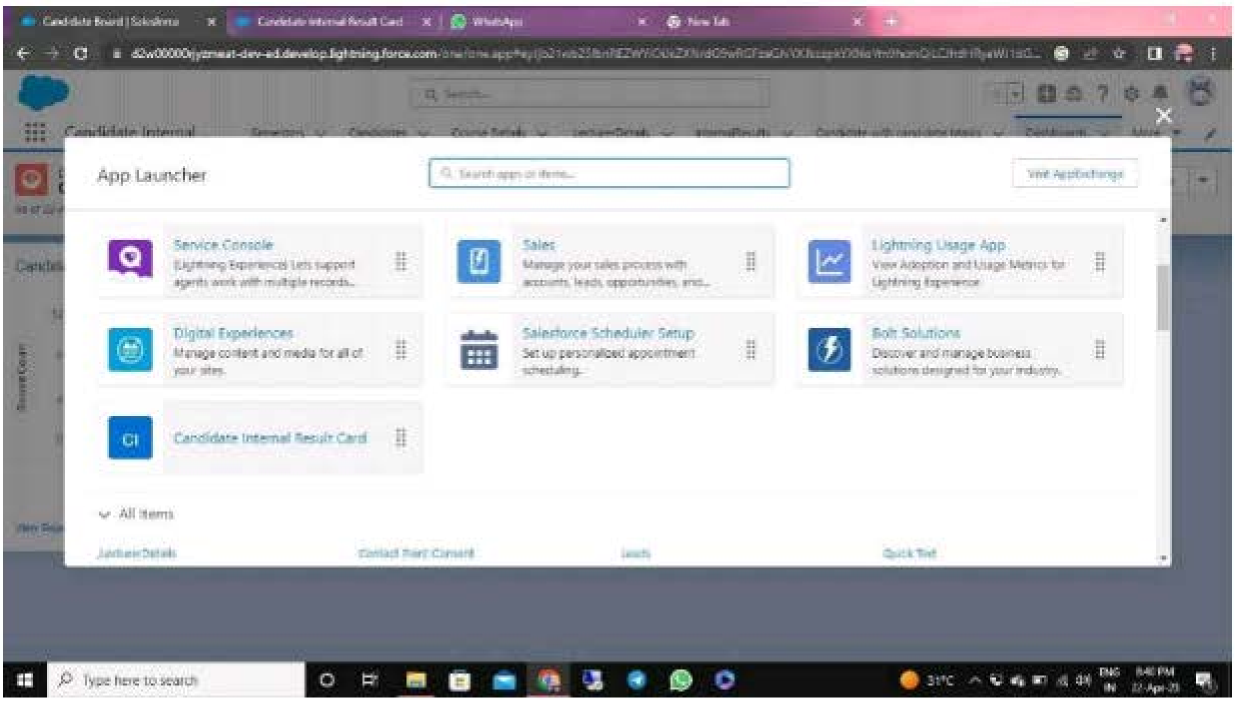
Milestone-3:Lightning App

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.

Activity-1:

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,LecturerDetails,InternalResults and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.



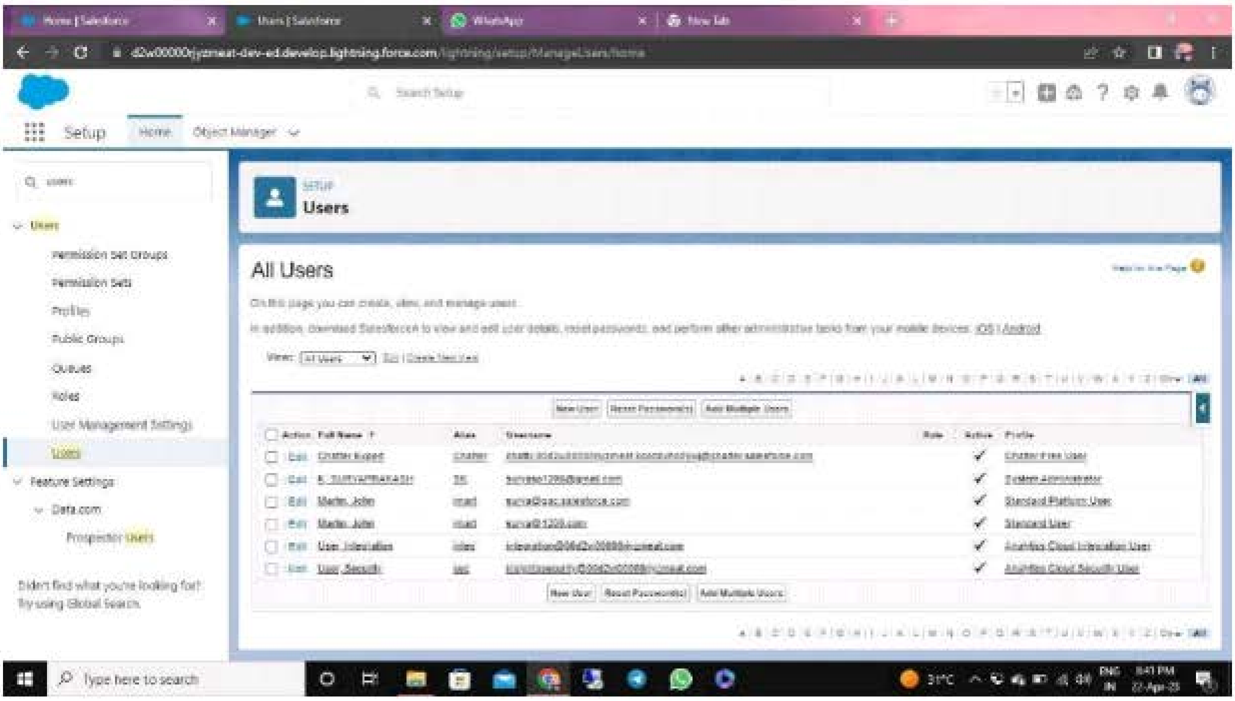
Milestone-4: Users

A user is anyone who logs in to 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.

Activity 1:

Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Martin 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.
4. Select a **Role**(none)
5. Select a User Licence As salesforce.
6. Select a profile as Salesforce User.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



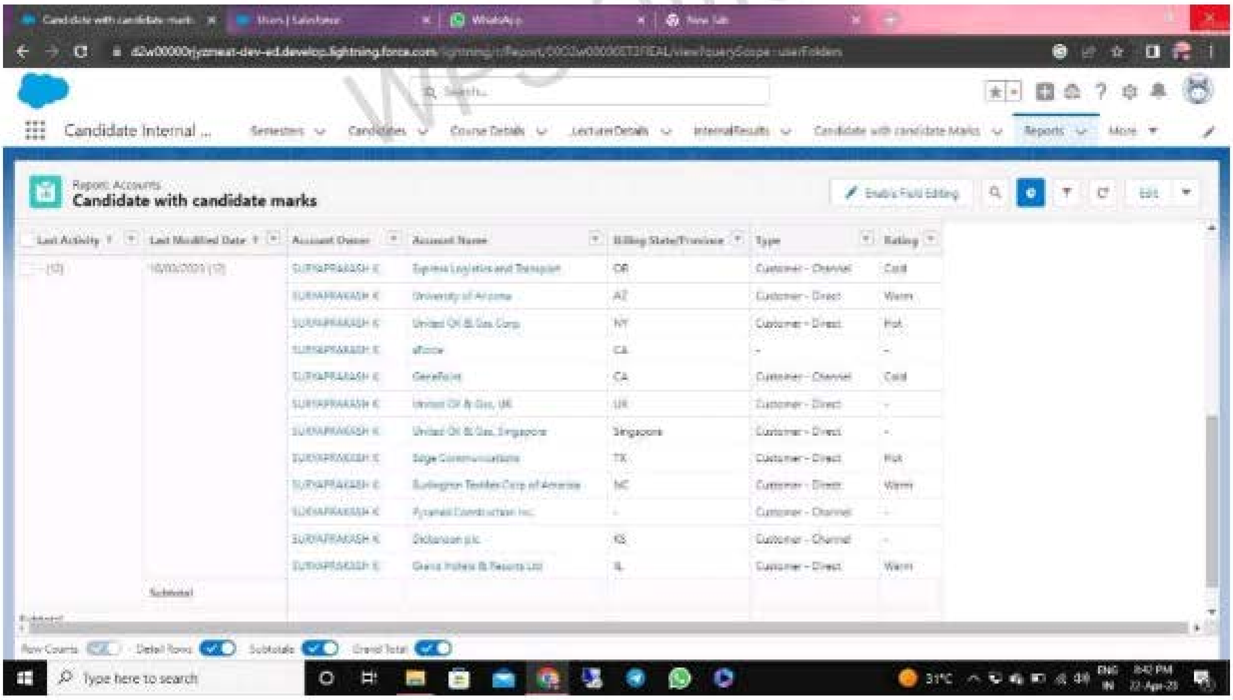
Milestone-5:Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity 1:

Reports and dashboards:

1. From the Reports tab, click New Report.
2. Select the report type as Candidate with candidate Marks for the report, and click Create.
3. Customise your report, then save or run it.



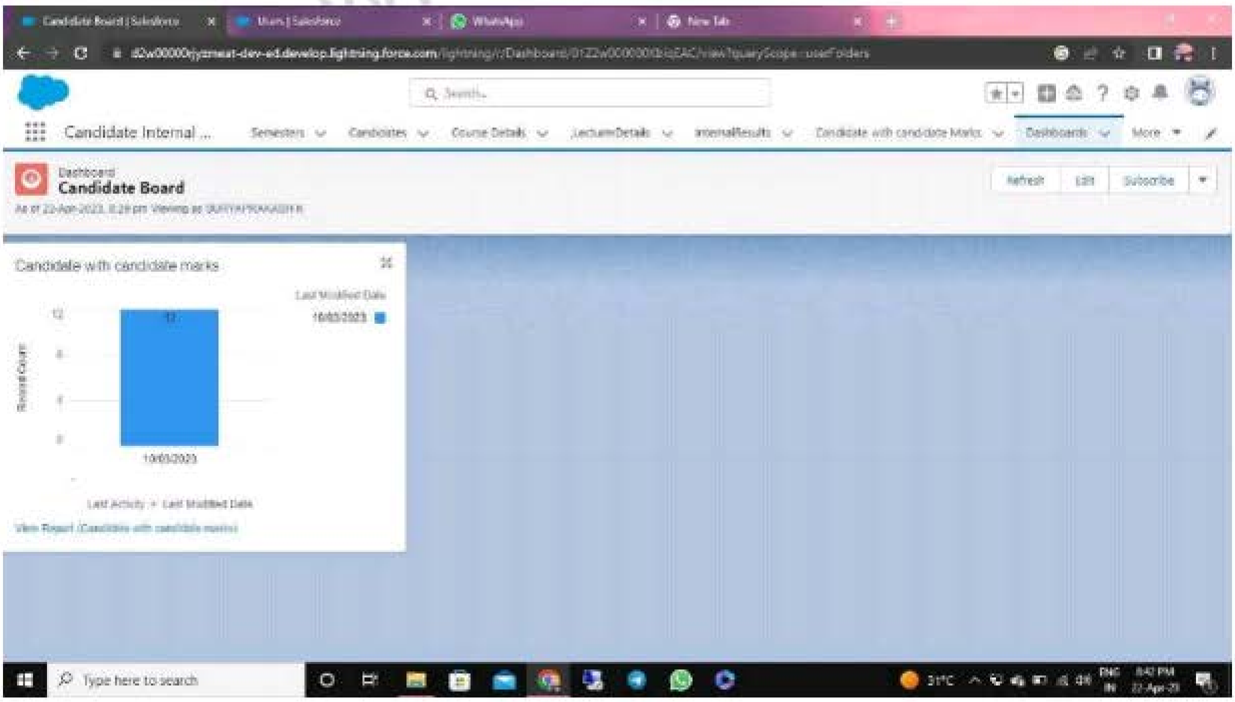
Milestone-6:Dashboards:

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.

Activity 1:

Create a Dashboard:

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name your dashboard Candidate Board . Leave all other fields as is and click Create.
4. Click + Component.
5. For Report, select Candidate Marksby Stage. Click Select. ...
6. For Display As, select Vertical Bar Chart and click Add.
7. Click Save.
8. Click Done



Trailhead Profile Public URL

TEAM MEMBERS

Trailhead URL

LEADER ;

T.G.MURUGAN

https://trailblazer.me/id/murtg3

MEMBERS ;

T.T.MURALI THARAN

https://trailblazer.me/id/muralitharan34612

P.MURUGAN

https://trailblazer.me/id/murup6

K.MUTHUKUMAR

https://trailblazer.me/id/mkumar2948

5. ADVANTAGES

Improve Candidate Experience: An Application Tracking system streamlines the application process, making it faster and more user-friendly for candidates. This can improve the candidate experience and help employers attract top talent.

Time-Saving: An Application tracking system automates many of the time- consuming tasks associated with recruiting, such as screening resumes and scheduling interviews. This frees up HR staff to focus on other important tasks.

Cost Effective: An Application Tracking system can help reduce the costs associated with recruiting and hiring by eliminating the need for manual processes, such as printing and mailing resumes.

DISADVANTAGES

1. Technical glitches can cause job applications to be lost or overfooked. Keyword matching can result in qualified candidates being overfooked.

2. Lack of personalization can make the application process feel impersonal. Job Application tracking system can be time consuming for both employers and job seekers.

3. They can prioritize quantity over quality, leading to a flood of unqualified applicants.

4. Overreliance on Job Application systems can cause employers to miss outon top talent who don’t fit the system’s

6. APPLICATIONS

1. Job Application Tracking systems are soGware programs that helpemployers manage and automate their recruitment processes.

2. These systems typically include features such as resume praising, candidate screening, and interview scheduling.

3. Application Tracking system can help employers save time and money by automating many of the time-consuming tasks associated with recruitment.

4. The use of Application tracking systems has become increasingly common in recent years, particularly in larger organization.

5. One of the benefit of the system is that they can help employers identify the most qualified candidates for a given job.

7. CONCLUSION

In conclusion, job application tracking systems can help employers manage large volumes of applications and streamline the recruitment process. However, they can also have some disadvantages, including technical glitches, reliance on keyword matching. Lack of personalization, potential for bias, and time-consuming processes. It's important for employers to carefully evaluate the effectiveness of their Application Tracking system and consider the need of job seekers in the application process. Job seekers should also be aware of the limitations of these systems and takes steps to optimize their resumes for keyword matching while also highlighting their unique qualifications and experience.

8. FUTURE SCOPE:

1. Integration with social media platforms and professional networks for a wider pool of candidates.