

Project Report Template

Implementing CRM for result tracking of a candidate with internal marks

1. INTRODUCTION

1.1 Overview

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-valuation

1.2 Purpose

It aims to produce a real time knowledge of the salesforce and how can we build a app using salesforce in this project we build a candidate results card application for educational institutions,which would be useful for the staffs to reduce time and track the performance of the students with case.it is helpful to have large number of data maintained under one platform

2. Problem Definition & Design Thinking

2.1 Empathy Map



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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[Open example](#)



Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

"I don't feel like I'm getting any help from this system."

"This is not the way I want to use this system."

"I don't know what to do with this system."



"Our system is not user-friendly."

"I don't know how to use this system."

"I don't know what to do with this system."



"I don't know how to use this system."

we are using this system to make things better. Can you help us to make it better?

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

"I don't know what to do with this system."

"I don't know how to use this system."

"I don't know what to do with this system."



"I don't know how to use this system."

"I don't know what to do with this system."

"I don't know how to use this system."

Does

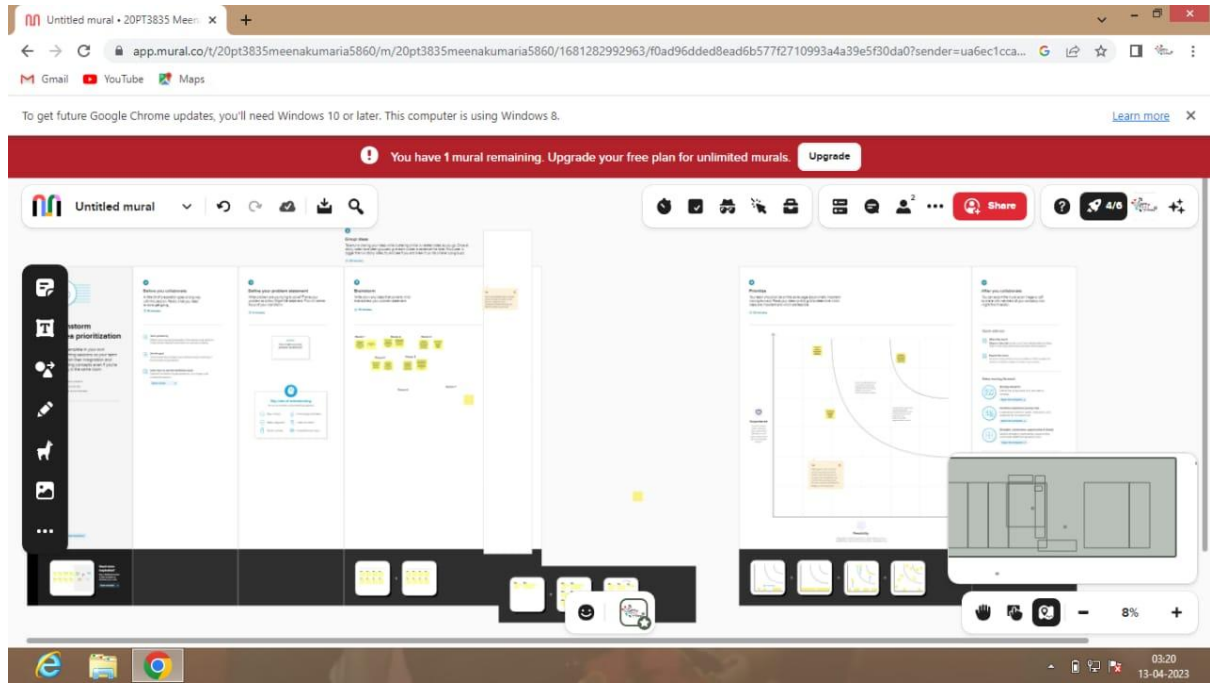
What behavior have we observed?
What can we imagine them doing?

Feels

What emotions, attitudes, and opinions? What other feelings might influence their behavior?



2.2 Ideation & Brainstorming Map



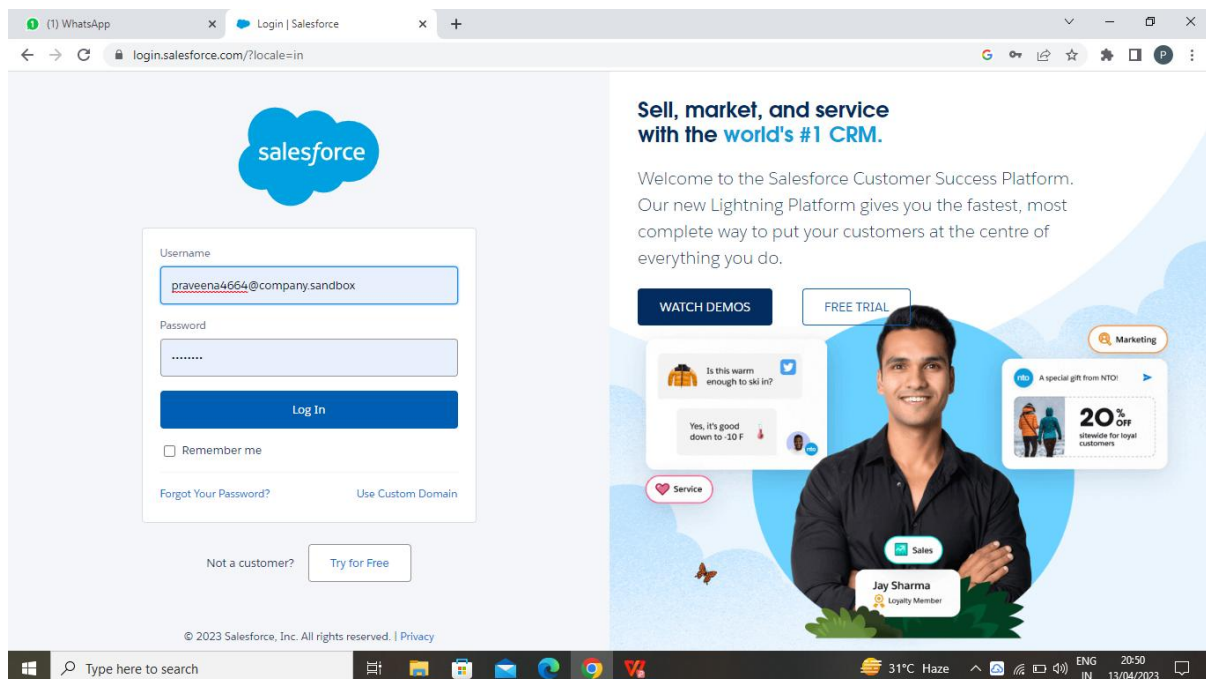
Object Name	Field in the Object	
Semster Candidate course	Field Label	Data Type
	Semester name	text
	Candidate name	Text
	Course details	text
Lecturer details Internal results	Field Label	Data Type
	Lecturer name	text
	Internal marks	text

3.2 Activity & Screenshot

Milestone 1: Creation Salesforce Org

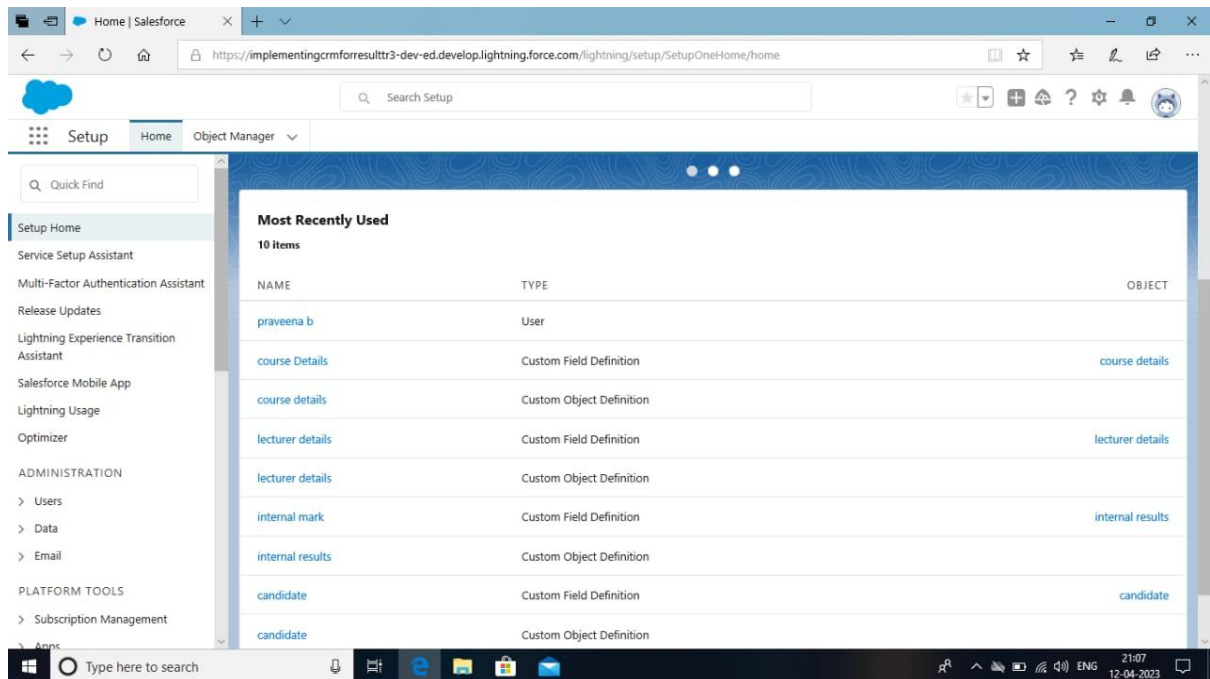
Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see



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



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.

internal mark | Salesforce

rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Ear8/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
internal mark

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
internal mark	internal_mark_c	Text(10)		
internal mark Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

lecturer details | Salesforce

rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Ear3/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
lecturer details

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
lecturer details	lecturer_details_c	Text(23)		
lecturer Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

semester | Salesforce

rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Eadp/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

semester

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

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
semester	semester_c__c	Text(22)		
semster Name	Name	Text(80)		✓

https://rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/one/one...

Type here to search

30°C Mostly clear

ENG IN 20:34 11/04/2023

The top screenshot shows the Salesforce Lightning App Manager interface for the 'candidate' object. The 'Fields & Relationships' section displays a table with 5 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
candidate	candidate__c	Text(20)		
candidate Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

The bottom screenshot shows the Salesforce Lightning App Manager interface for the 'course Details' object. The 'Fields & Relationships' section displays a table with 5 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
candidate Name	Name	Text(80)		✓
course Details	course_Details__c	Text(22)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Milestone-3: Lightning App

To create a lightning app page:

Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App

App Manager | Salesforce

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

29 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...
1	All Tabs	AllTabSet	Build CRM for Result tra...	20/03/2023, 7:22 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards an...	20/03/2023, 7:22 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	20/03/2023, 7:22 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solu...	20/03/2023, 7:25 pm	Lightning	✓
5	candidate internal result card	candidate_internal_result_ca...		07/04/2023, 2:27 pm	Lightning	✓

candidate internal result card - L

rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000005ZKCvAAO&retUrl=https%3A%2F%2Frajahserfojigov...

Lightning App Builder App Settings Pages candidate internal result card Help

App Settings

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

*App Name

candidate internal result card

*Developer Name

candidate_internal_result_card

Description

Enter a description...

App Branding

Image

Primary Color Hex Value

#0070D2

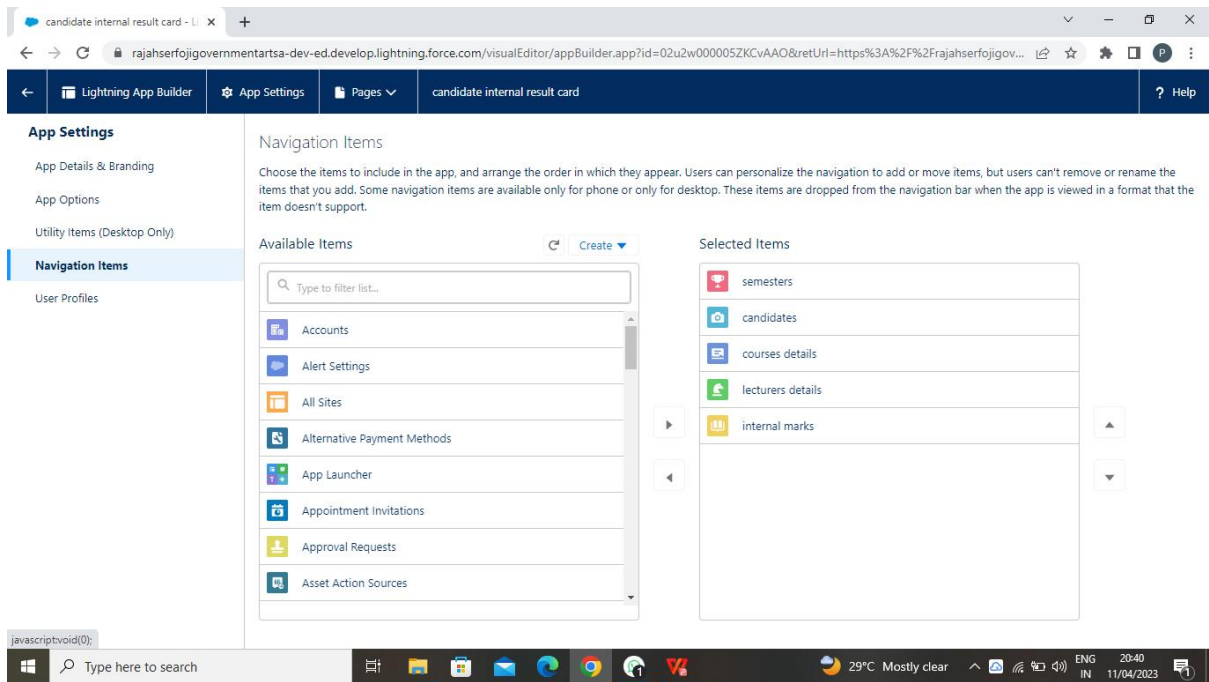
Upload

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

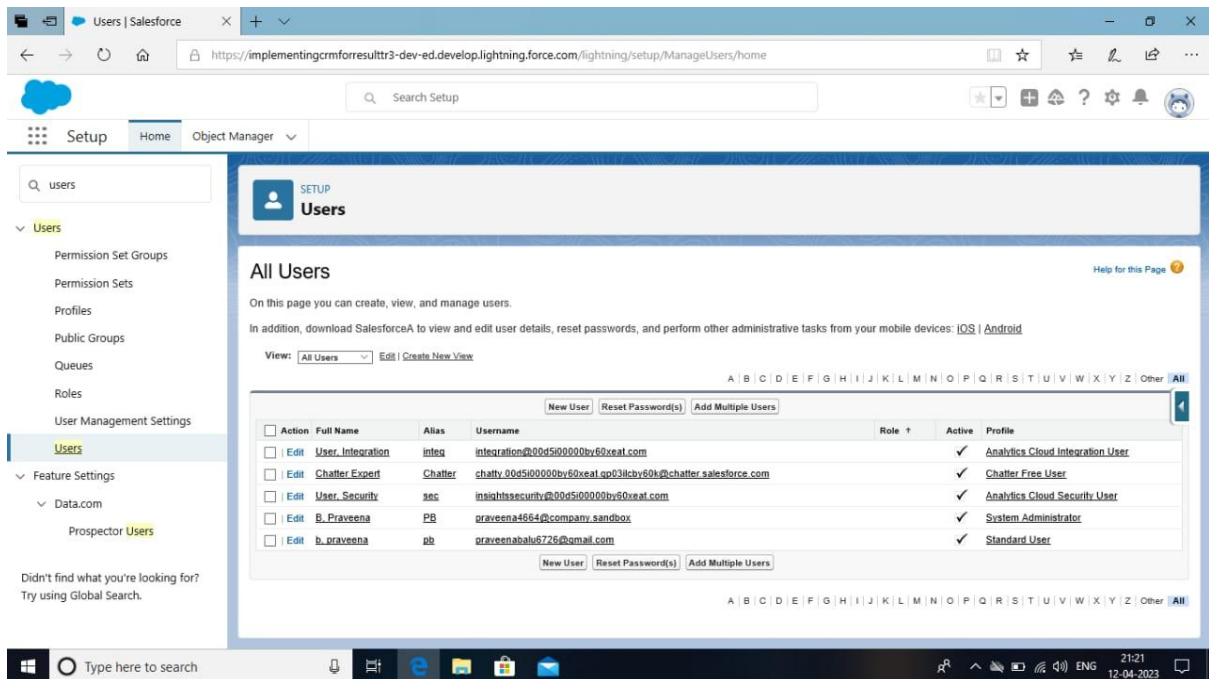
App Launcher Preview

ci candidate internal result card



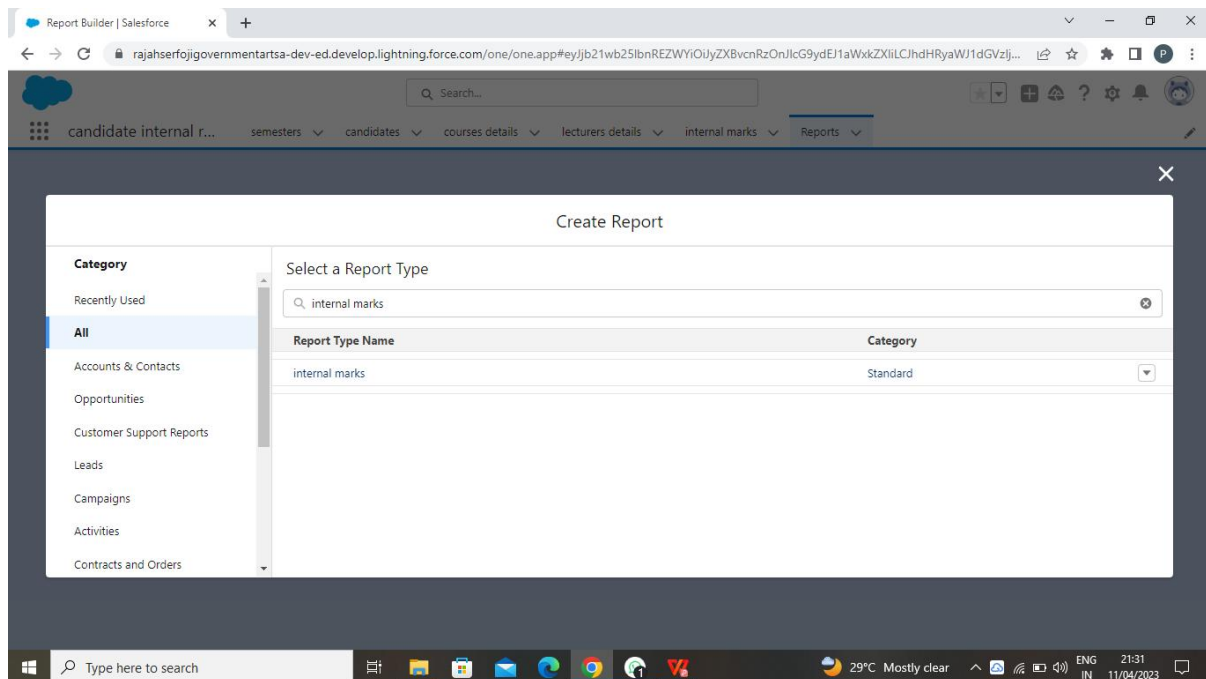
Milestone-4: Users

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.



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.



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.

salesforce '23

Search: Search

Praveena B Setup Help

Home Chatter Libraries Content Subscriptions candidates course details internal results lecturer details semesters +

internal results Report

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- Show All internal results

Time Frame: Date Field internal results: Created Date Range Custom From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

internal results: ID	internal results: internal results Name	internal mark	internal results: Owner Role	internal results: Created Date
a065i00000HL2nD	gouri	30		08/04/2023
a065i00000HL2mL	Bhuvaneshwari, J	30		08/04/2023
a065i00000HL2mZ	praveena	30		08/04/2023
a065i00000HL2n8	meena kamari	30		08/04/2023
a065i00000HL2nI	harisha	30		08/04/2023
Grand Totals (5 records)				

Confidential Information - Do Not Distribute

4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/bhuvj2>

Team Member 1-<https://trailblazer.me/id/gow1>

Team Member 2-<https://trailblazer.me/id/harip298>

Team Member 3 - <http://trailblazer.me/id/meena326>

Team Member 4- <https://trailblazer.me/id/pravb31>

5. ADVANTAGES & DISADVANTAGE

Advantage:

It allows for more effective relation between candidate and marks.

It increases staff productivity, lowers time costs and boosts morale.

Disadvantage:

Security concerns associated with centralised data.

The excess initial time and productivity cost of implementation

6. APPLICATIONS

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

7. CONCLUSION

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.**

8. FUTURE SCOPE

. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.