

Project Documentation and Report

SHORT TERM INTERNSHIP ON SALES FORCE
IMPLEMENTING CRM FOR RESULT TRACKING OF A
CANDIDATE WITH INTERNAL MARKS

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Team size: 4

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IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

Introduction :

Overview :

The improved features of CRM software have increased both its complexity and necessity. Nearly half of CRM implementation campaigns suffer from improper preparation and misaligned objectives among internal stakeholders. A properly conceived CRM implementation strategy covers the breakdown of its goals, research, strategy, development, and future. This article is for small business owners who want to make sure they are taking the right steps when implementing a new CRM system.

Purpose :

The purpose of the project is to manage the school students result tracking process in the easy way. Students do not need to check the notice board and everyone will stay updated. This is the main purpose of this project. We can work easily and increase candidate quality. This project will also help to those professionals who are in cross-technology and wanted to switch to

salesforce with the help of this project they will gain knowledge and can include into their resume as well.

Literature survey :

A CRM system can be used to improve the relationship you have with candidates. You can use it to communicate with them effectively, meaning they will be more likely to respond when you send them an email inviting them for an interview or informing them of their status in your recruitment process.

Implementation of CRM in enterprises serves not only to maintain existing customers and acquire new ones but also introduces integration in the company, improves processes and communication between individual departments.

Theoretical analysis :

Block Diagram : Diagrammatic view of the project :

Implementing CRM for result tracking of a candidate with internal marks :

Create Salesforce Org – a) Creating Developer Org
b) Account Activation



Object – Creation of semester object for candidate internal result card



What is a Tab? – Creation of semester tab for candidate internal result card



Lightning App – Create the candidate for internal result card app



Fields and relationships – a) Creation of text field on lecturer details and look up field for the candidate object.
b) Creation of auto number field on candidate object, number field on course details object and formula field course details object



Users – Creating a User



User Adoption – a) Create Record (Course details)
b) View Record (Course details)
c) Delete Record (Course details)



Reports – a) Create Reports

b) View Reports



Dashboards – a) Create Dashboards

b) View Dashboards

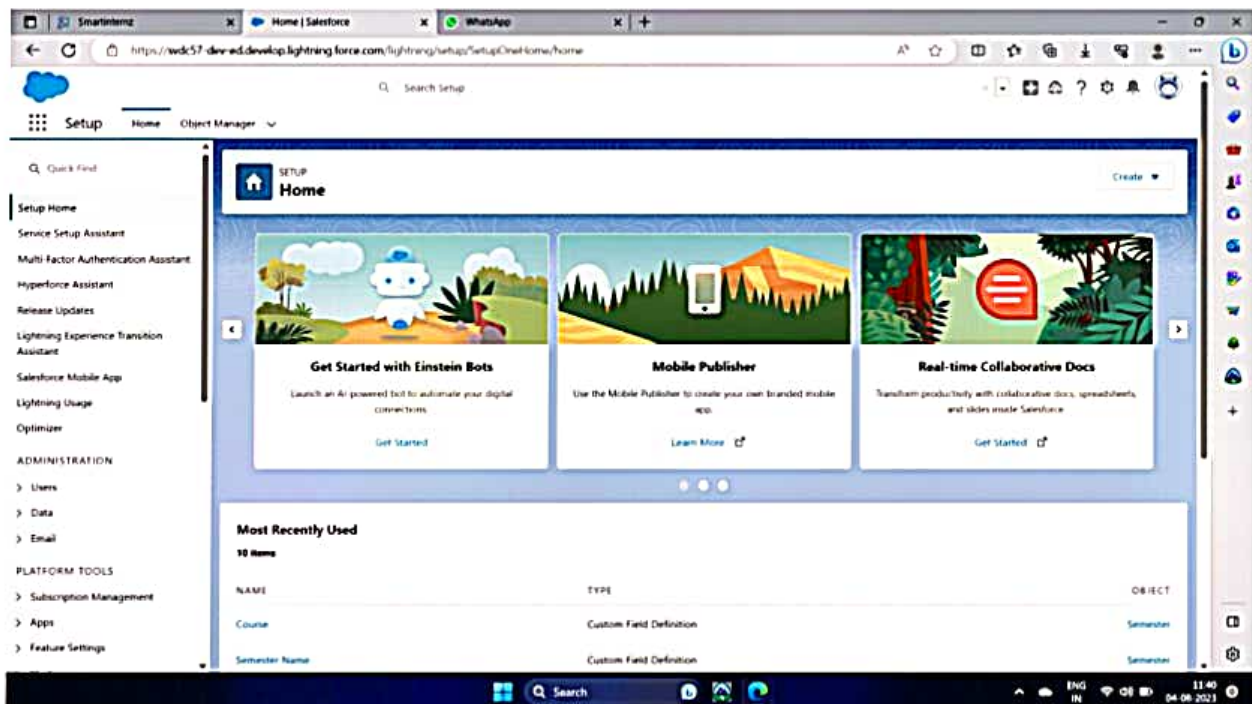
Create a salesforce org – We have created a developer org and activated the account.

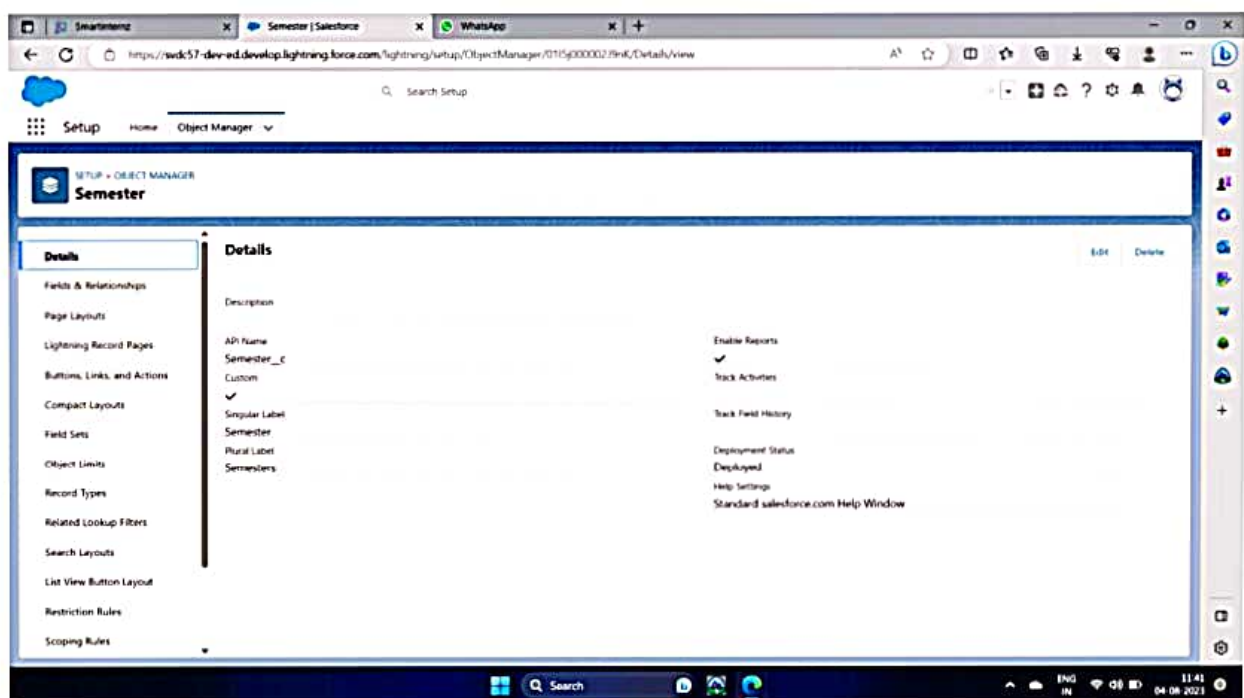
Salesforce signup link :

<https://developer.salesforce.com/signup>

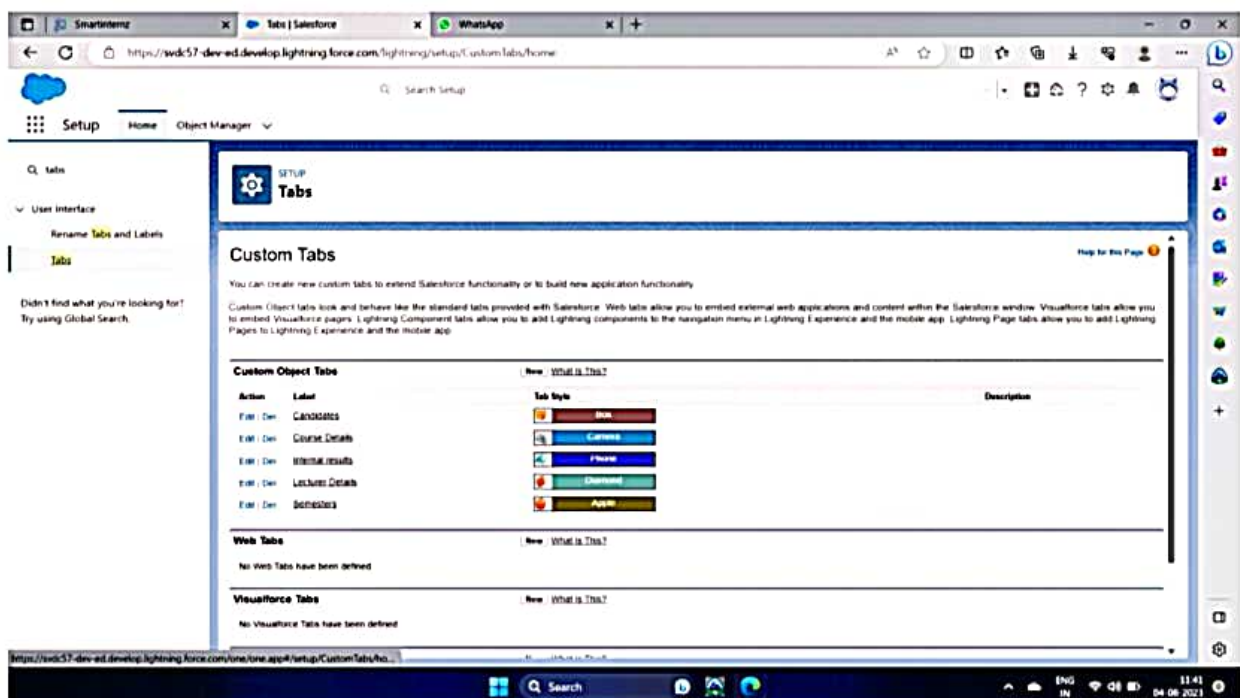
Salesforce Login link : <https://login.salesforce.com>

In the below picture we have logged into Salesforce org.

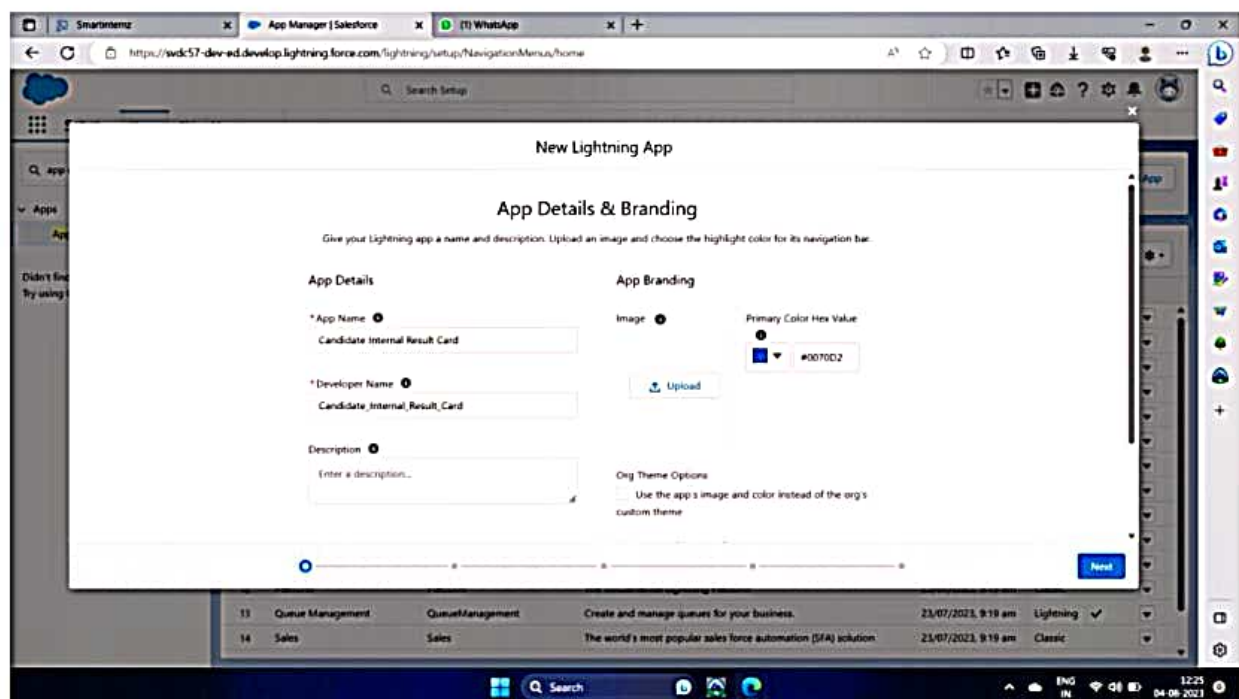




Tab – We have created semester, candidate, course details, lecturer details, internal results tabs for candidate internal result card.



Lightning App – We have created the candidate internal result card app.



Fields and relationships – We have created text field on lecturer details and lookup field for the candidate object. And created auto number field on candidate object, number field on course details object and formula field course details object. In the similar way we have created all fields on their respective objects.

SmartInternz | Home | Salesforce | WhatsApp

https://apsche.smartinternz.com/student/guided_project_info/3443#

Smart Internz

Dashboard
Internship
Support
Training Calendar

Guided Project | Project Workspace

Candidate With Internal Marks - (ADMIN)

- Create Salesforce Org
- Object
- What is A Tab?
- Lightning App
- Fields And Relationship

Creation Of Test Field On "Lecturer Details" & Look Up Field For The "Candidate" Object

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

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.

Object Name	Field Name	Data type
Semester	Semester Name	Text(Standard field)
	Course	Lookup(Course Details)
Candidate	Candidate Name	Text(Standard field)
	Candidate Roll Number	Auto Number
	Semester Name	Lookup(Semester)
Lecturer Details	Lecturer Name	Text(Standard field)
	Lecturer Role	Text
	Course	Lookup(Course)
Course Details	Course Name	Text(Standard field)
	Duration (Years)	Number
Internal results	Candidate	Lookup (candidate)
	Candidate	Formula
	Roll Number	
	Course	Lookup(Course)
	Marks	Number

11:47 04-08-2023

SmartInternz | Semester | Salesforce | WhatsApp

https://wdc57-dev-ed.develop.lightning.force.com/lightning/setup/ObjMgr/015p000002/FieldsAndRelationships/view

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
List View Button Layout
Restriction Rules
Scoping Rules

Fields & Relationships
6 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	Course__c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Semester Name	Semester_Name__c	Lookup(Semester)		✓
Semester Name	Name	Text(50)		✓

12:09 04-08-2023

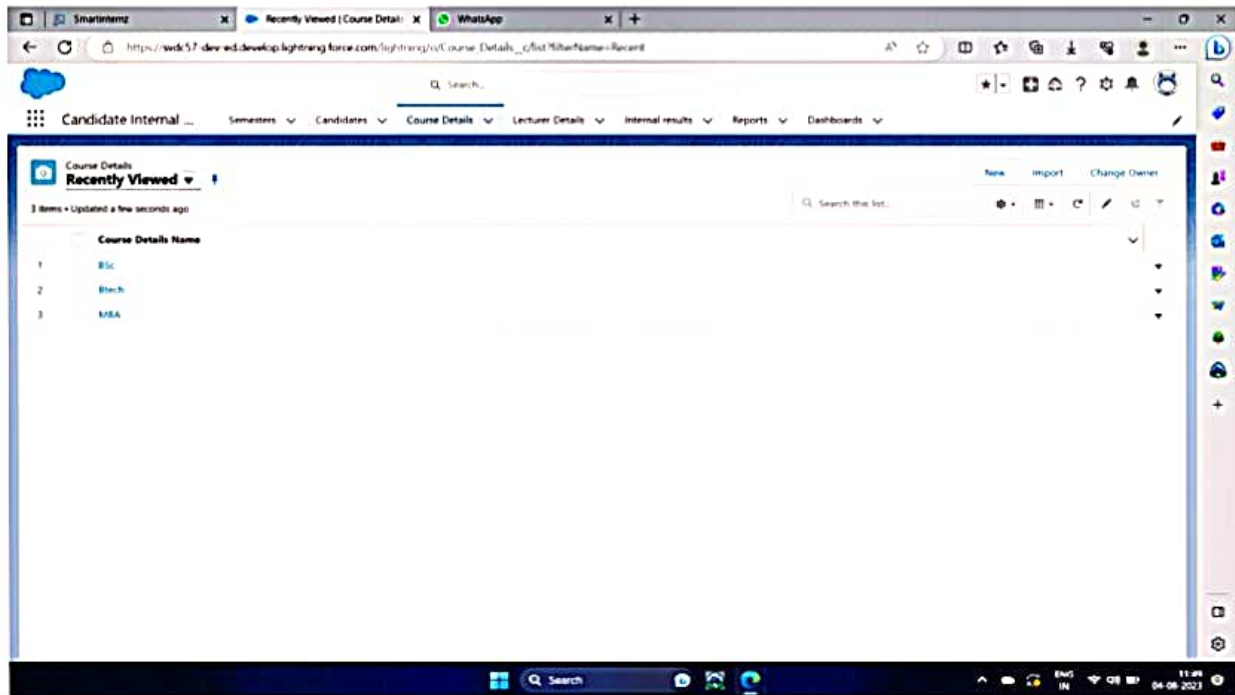
Users – We have created a user named as class teacher.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Quizzes, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area displays the 'Class Teacher' user profile. The user details include Name (Class Teacher), Alias (class), Email (puturvarma06@gmail.com), Username (puturvarma06@gmail.com), Nickname (User16000963214572327968), Title, Company, Department, Division, Address (India), Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), Language (English), Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Federation ID, and App Registration One-Time Password. The right sidebar shows the user's role (Salesforce Standard User) and a list of permissions, including Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, B2C User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Screen Only), Debug Mode, High Contrast Payments on Charts, and Load Lightning Pages While Scrolling.

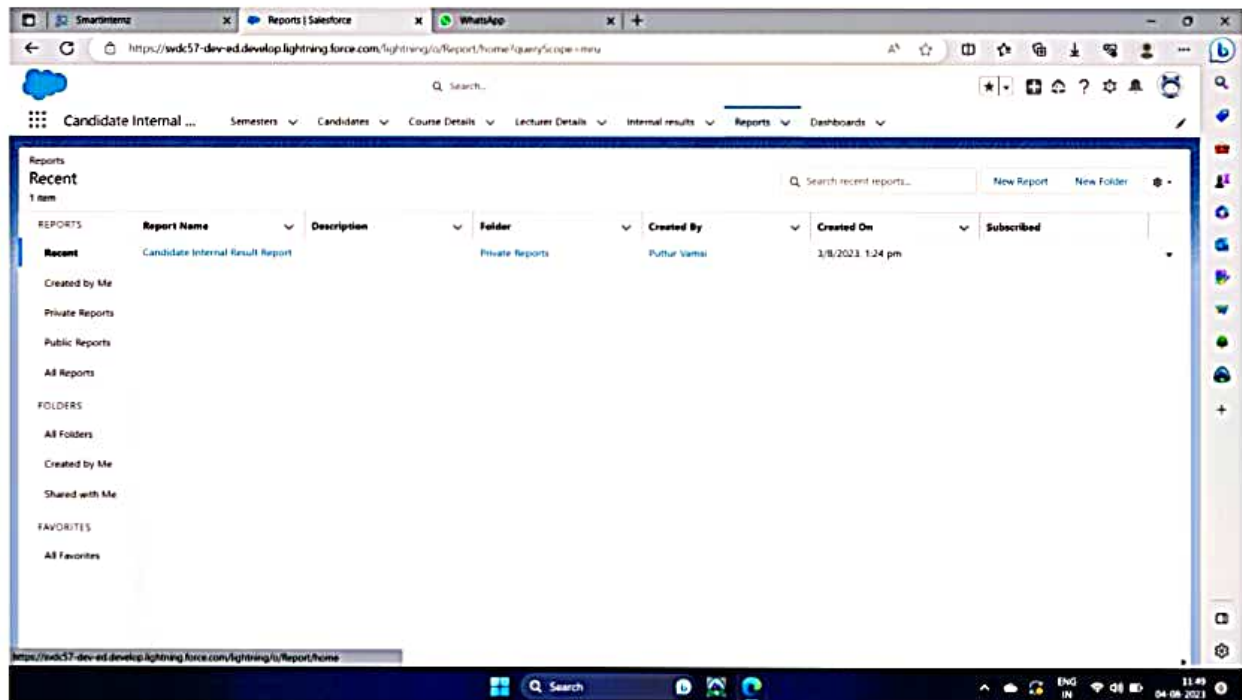
User Detail	
Name	Class Teacher
Alias	class
Email	puturvarma06@gmail.com (verified)
Username	puturvarma06@gmail.com
Nickname	User16000963214572327968
Title	
Company	
Department	
Division	
Address	India
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration One-Time Password	

Role	Profile
Salesforce Standard User	Standard User
Marketing User	Active
Offline User	
Knowledge User	
Flow User	
Service Cloud User	
Site.com Contributor User	
Site.com Publisher User	
B2C User	
Mobile Push Registrations	Yes
Data.com User Type	
Accessibility Mode (Screen Only)	
Debug Mode	
High Contrast Payments on Charts	
Load Lightning Pages While Scrolling	

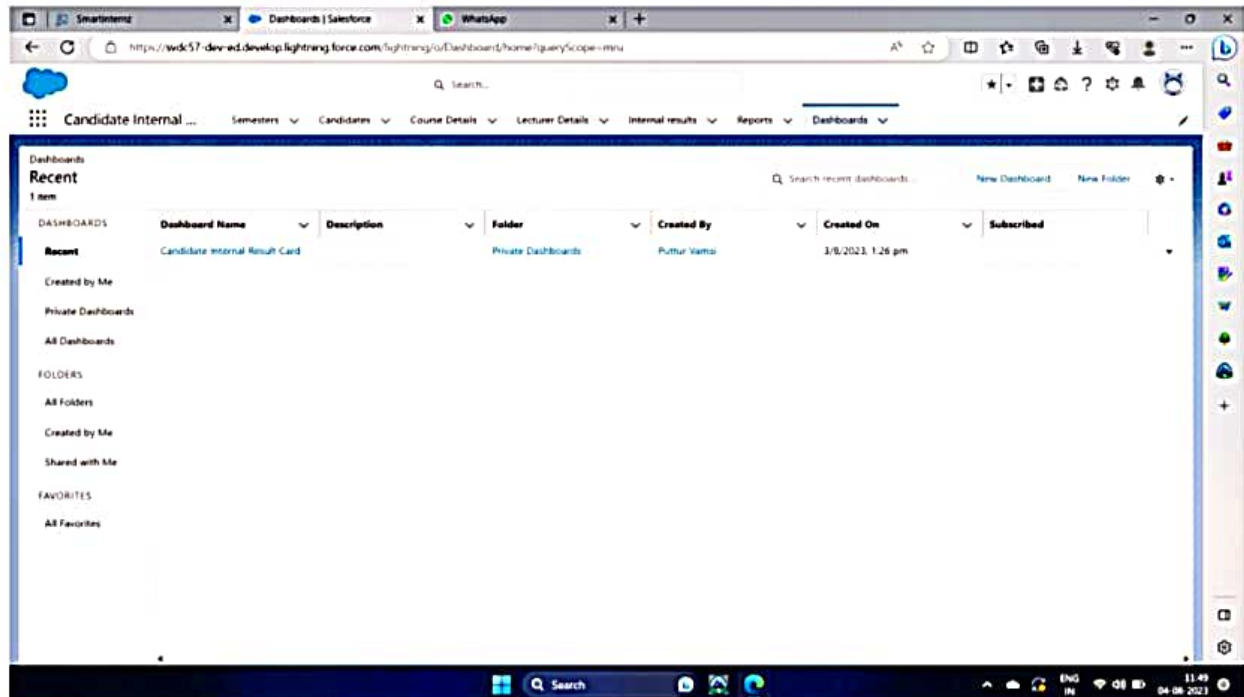
User Adoption – We have created records, viewed records and deleted a particular record in course details.



Reports – We have created and viewed report named as candidate internal result report.



Dashboards – We have created and viewed dashboard named as candidate internal result card.



Result :

Reports – We have created and viewed report named as candidate internal result report.

The screenshot shows the Salesforce Reports interface. The browser address bar displays the URL: `https://wdk57-dev-ed.develop.lightning.force.com/lightning/r/Report/home?queryScope=mini`. The page title is "Candidate Internal ...". The navigation bar includes "Semesters", "Candidates", "Course Details", "Lecturer Details", "Internal results", "Reports", and "Dashboards". The "Reports" section is active, showing a "Recent" report titled "Candidate Internal Result Report" created by "Pulkit Vamsi" on "3/8/2023, 1:24 pm". The left sidebar lists "REPORTS", "FOLDERS", and "FAVORITES".

The screenshot shows the "Candidate Internal Result Report" in Salesforce. The report title is "Report: Semesters with Course Candidate Internal Result Report". The "Total Records" are 9. The table displays record counts for different courses and durations.

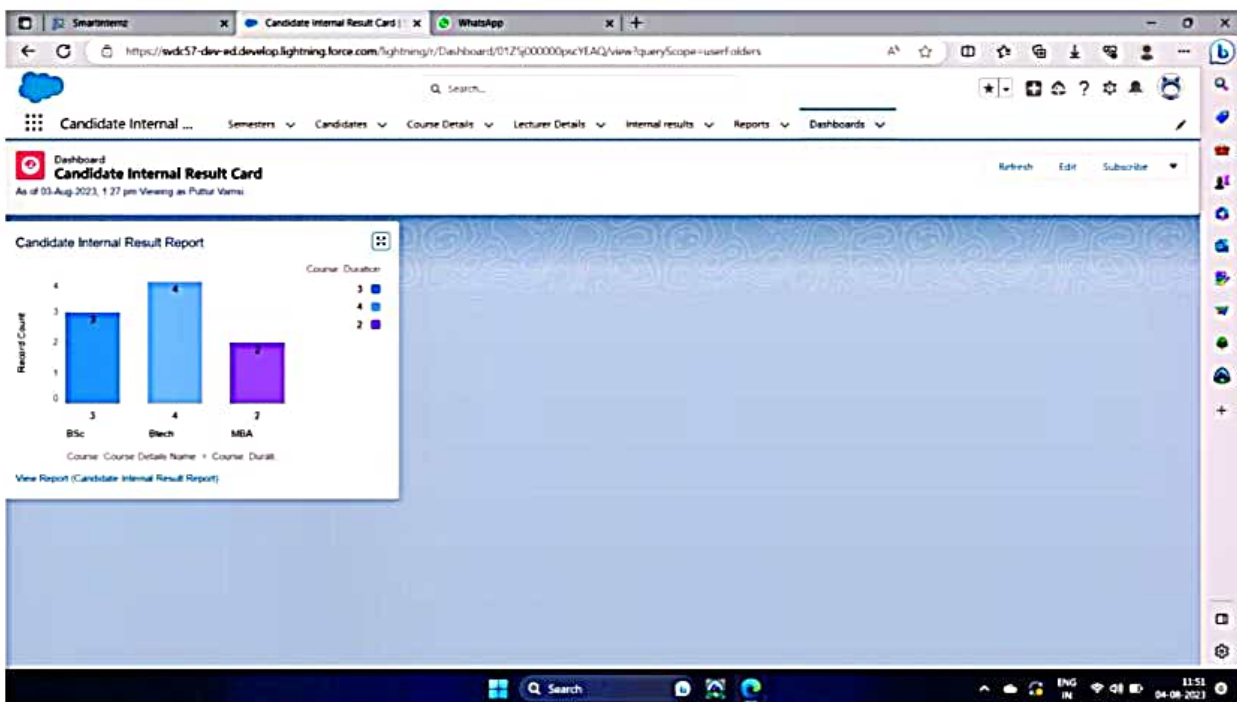
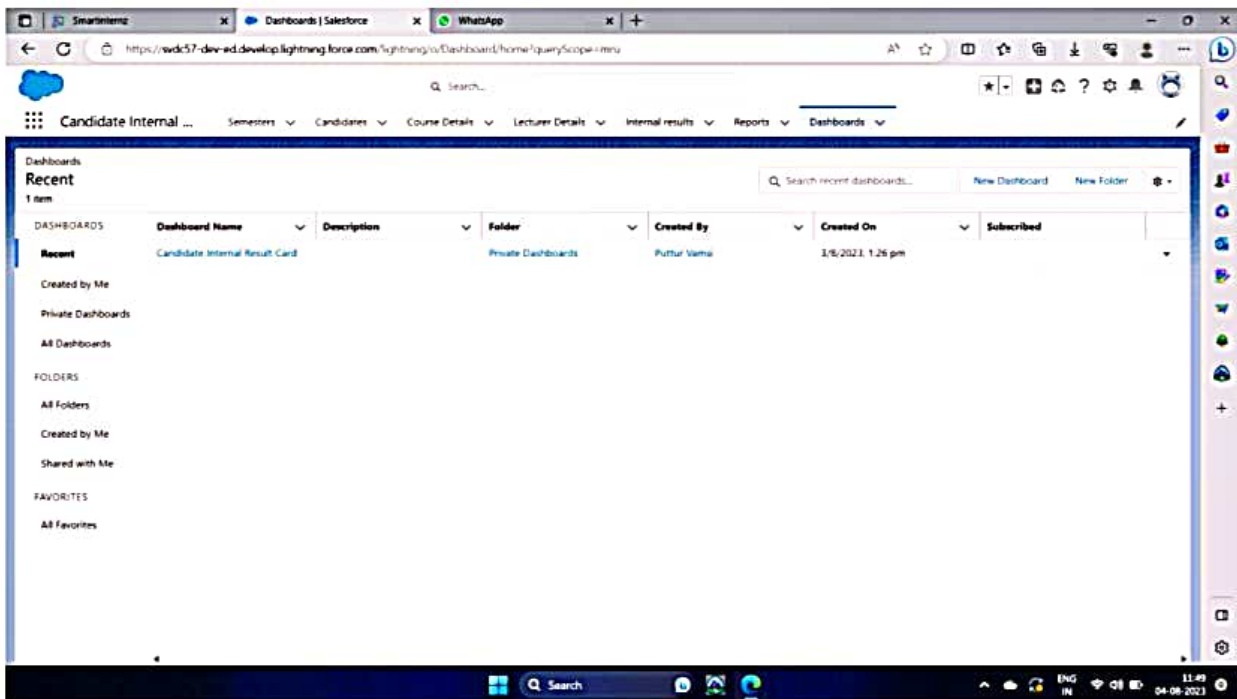
Course: Course Details Name	Course: Duration	2	3	4	Total
BSc	Record Count	0	3	0	3
BTech	Record Count	0	0	4	4
MBA	Record Count	2	0	0	2
Total	Record Count	2	3	4	9

Details (9 Rows) Click an intersection in the table above to filter details.

Course: Record ID	Duration
1 a02500000a09E1	Large Course
2 a02500000a09E1	Large Course
3 a02500000a09E1	Large Course
4 a02500000a09F1	Large Course
5 a02500000a09F1	Large Course
6 a02500000a09F1	Large Course

Row Counts: ☒ Detail Rows: ☒ Grand Total: ☒ Stacked Summaries: ☒

Dashboards – We have created and viewed dashboard named as candidate internal result card.



Advantages and Disadvantages :

Advantages :

- It allows for the consolidation of customer data and the basis for deep insights.
- It speeds up the sales conversion process.
- It increases staff productivity, lowering time-cost.
- It allows geographically dispersed teams to collaborate effectively.
- Improves Customer experience by allowing personalization and improved query resolution.

Disadvantages :

- Customer experience may worsen due to staff over-reliance on the system.
- Security and data protection issues with centralized data.
- The excess initial time and productivity cost at the implementation.
- Requires a process-driven sales organization.
- CRM may not suit all businesses.

Applications :

- Target marketing
- Increase candidate quality
- Can work easily

-
- Streamlining internal sales processes

Conclusion :

Student internal mark management system deals with student details, academic related reports, college details and course details. It tracks all the details of a student from the day one to the end of his/her course which can be used for all reporting purpose, tracking of progress in the course, completed semester, upcoming semester details, exam details, project or any other assignment details, and final exam result.

Future scope :

Scope of education means range of view, outlook, field or opportunity of activity, operation and application of education. Education has a wider meaning and application.