

GOVERNMENT ARTS COLLEGE FOR WOMEN
SALEM-8

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IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1.INTRODUCTION :

1.1 OVERVIEW :

A CRM implementation saves time to most efficient route, achieving desired CRM internal results of candidate CRM saves money exactly what type of solution to seek, and all the cost associated with it, only spending as much as you need to. CRM helps to collect the data of candidate internal marks monthly basis or termly basis which give accurate details of respective students.

1.2PURPOSE:

CRM implementation and the processes and tools that can be used for the purpose of phases to ensure that CRM projects delivered what is expected of the internal marks depending on the result of the project some of these phase's processes on tools may not be required.

1.3 OBJECTIVES:

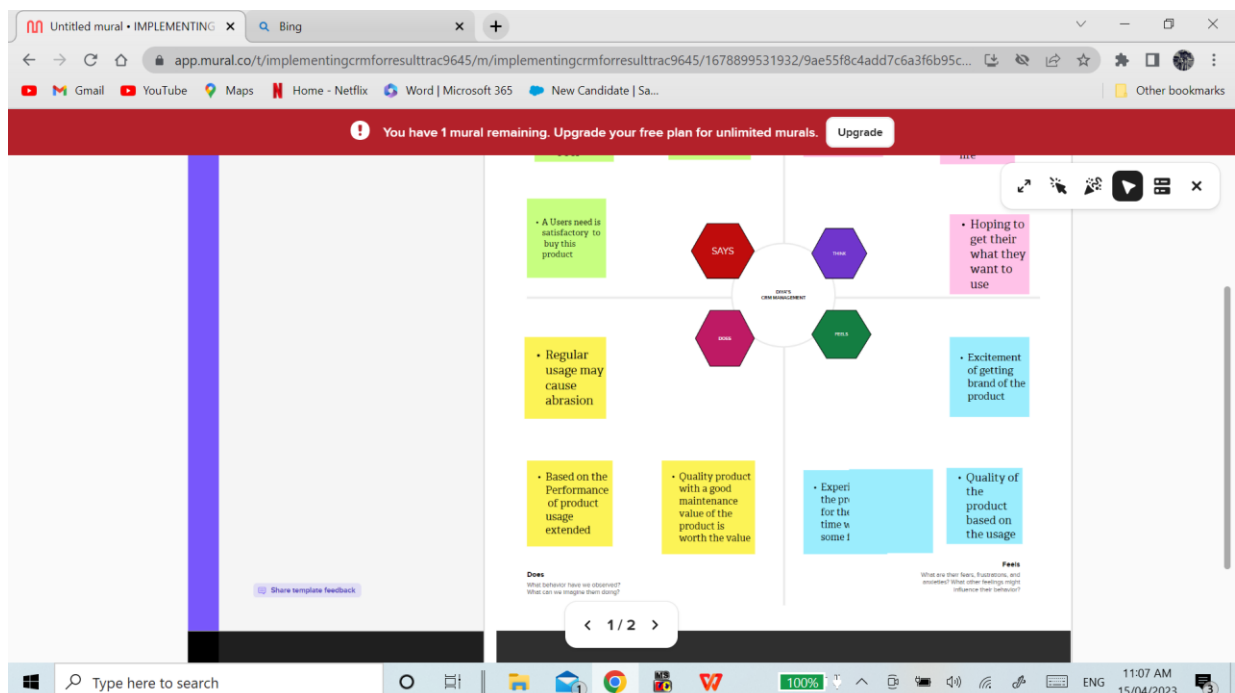
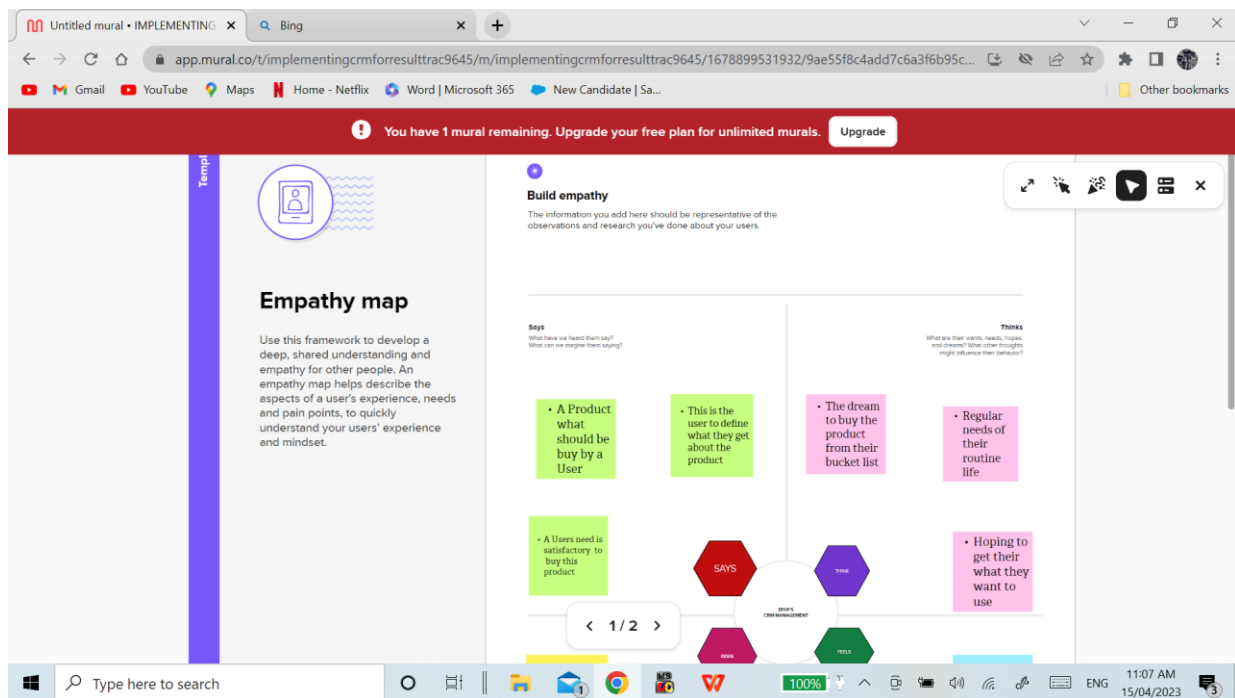
- * The objectives of the CRM implementation are to provide a effective information with that CRM process to best outcome of candidate.

- * CRM implementation of tracking candidates' information with accurate and well-known manner which better outcome or result of the other software.

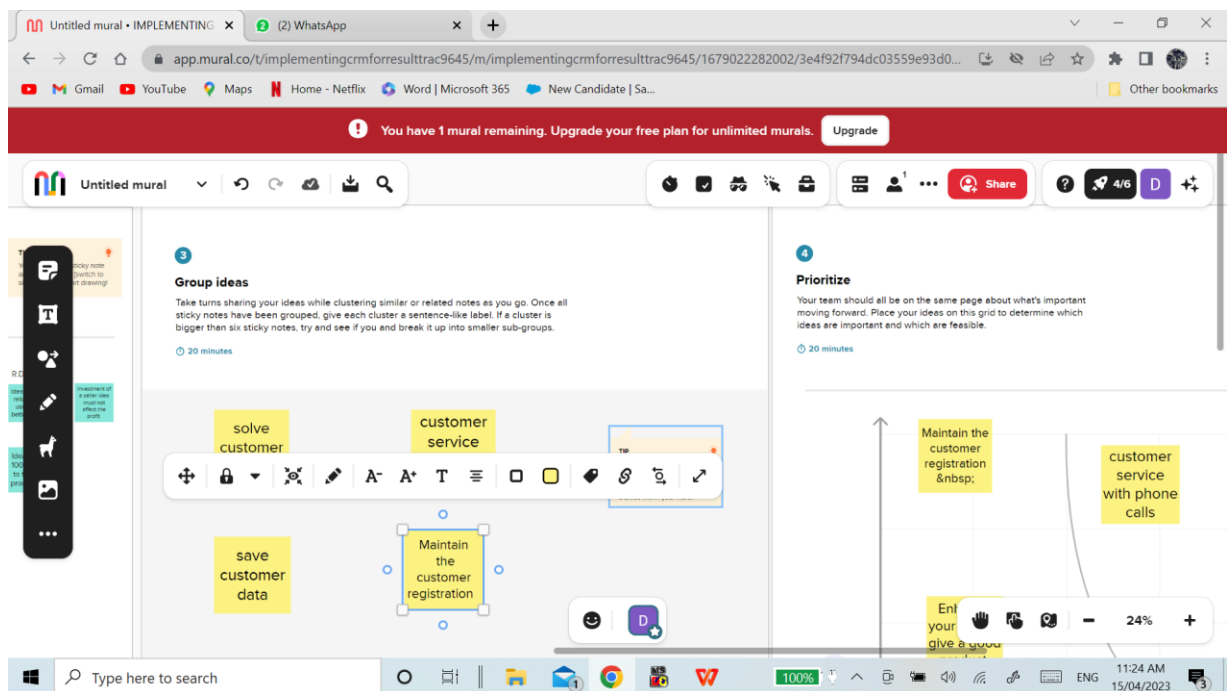
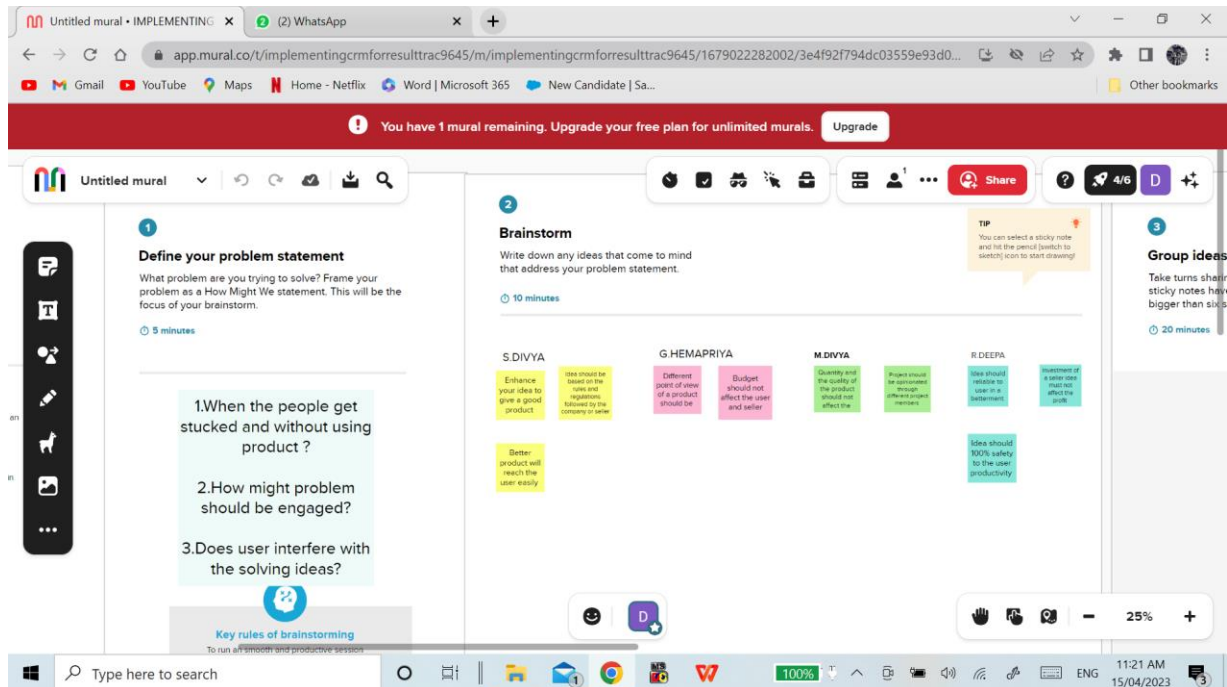
*The CRM software enhance the large amount candidate details without any glitches of processing of the candidate's data

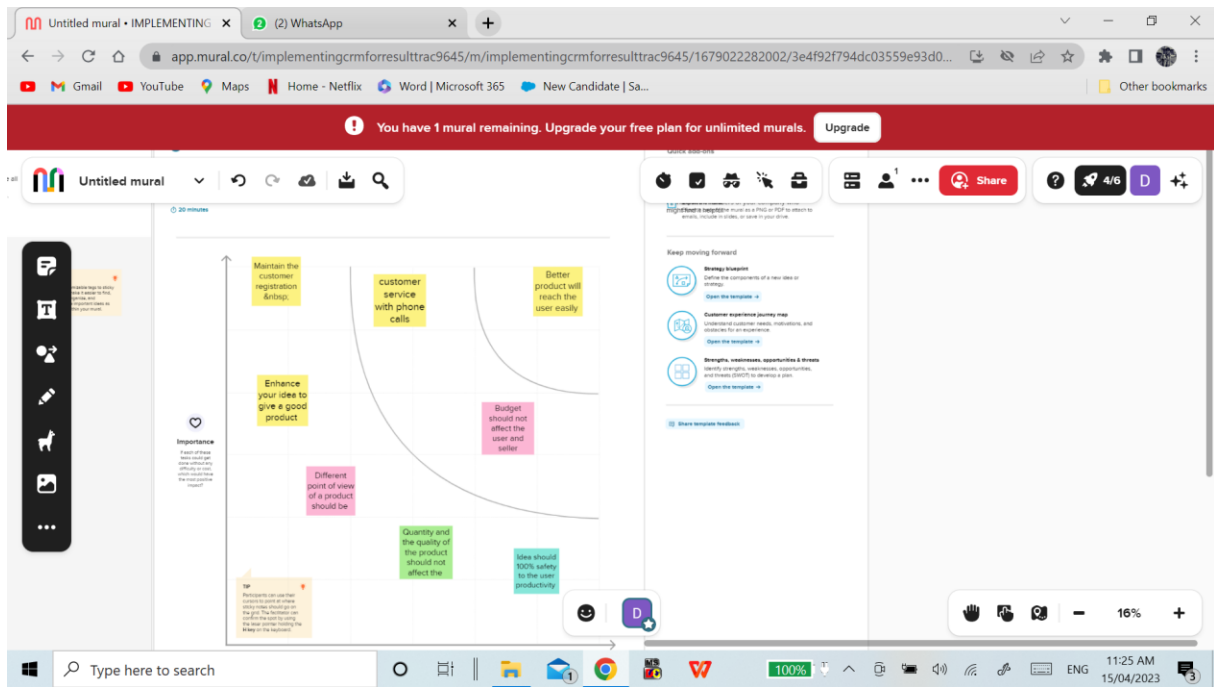
2.PROBLEM DEFINITION AND DESIGN THINKING:

A. EMPATHY MAP:



B. IDEATION AND BRAINSTORMING MAP:





3.RESULTS:

3.1 DATA MODEL:

Object Name	Fields in the Object	
Object 1	Field Label	Data Type
	1. Semester Name	Text
	2. Course	Look Up
Object2	Field Label	Data Type
	1.Candidate Name	Text
	2.Candidate ID	Text
	3.Semester Name	Text
	4.Internal Results	Look Up
Object3	Field Label	Data Type
	1.Course Name	Text
	2.Course ID	Text
Object4	Field Label	Data Type
	1.Lecturer Role	Text
	2.Lecturer Name	Text

	3.Course ID	Text
	4.Course	Look Up
Object5	Field Label	Data Type
	1.Candidate ID	Text
	2.Course ID	Text
	3.Marks	Text

3.2ACTIVITIES AND SCREEN SHOT:

ACTIVITY I:

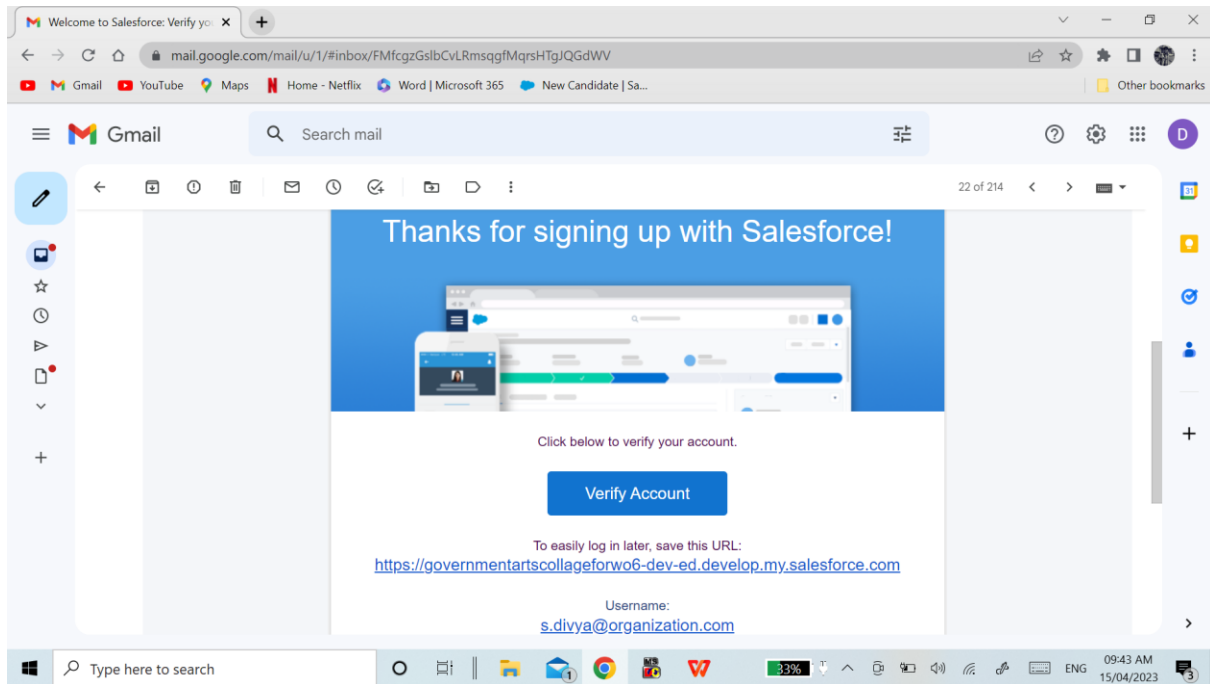
CREATING DEVELOPER ACCOUNT

Go to developers.salesforce.com/

Click sign up

Enter the Details: First name & Last name, Email, Role: Developer, Company: GACW, Country: India Postal Code: pin code, username: as like username@organization.com sign up. You receive the mail for account activation. Go to Salesforce and click login Enter username and password

After login this home page will be display



ACTIVITY II:

OBJECT CREATION

Description:

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

Setup→ Object manager→ Create→Custom Object→Label: Semester
Plural Label: Semesters → allow Reports and allow search→→save

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Email Administration

- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Big Objects
 - Picklist Value Sets
 - Packages
 - Report Types
 - Tabs
 - Service Cloud Launch Pad
 - Action Link Templates
 - Global Actions
 - Workflow & Approvals
- Develop
 - Lightning Bolt
 - Schema Builder
 - Lightning App Builder
 - Canvas App Previewer
 - Installed Packages

Allow Reports ☒

Allow Activities ☐

Track Field History ☐

Allow in Chatter Groups ☐

Enable Licensing ☐

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing ☒

Allow Bulk API Access ☒

Allow Streaming API Access ☒

Deployment Status

[What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search ☒

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout ☐

Launch New Custom Tab Wizard after saving this custom object ☐

Save Save & New Cancel

Similarly create the course, internal results, lecturer details object.

ACTIVITY III:

FIELDS AND RELATIONSHIP

An object relationship in sales force 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 record they can also see and access related data

Setup → Object manager → Type Object Name in Search bar → Click Object → Fields and Relationship → New → Fill the Field Label Name → Next → Next → Save

The screenshot shows the Salesforce 'New Custom Field' setup page for the 'Semester' object. The page is titled 'Step 2. Enter the details' and 'Step 2 of 4'. The left sidebar contains navigation links for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer'. The main content area includes the following fields and options:

- Field Label:** Semester Name
- Length:** 13
- Field Name:** Semester_Name
- Description:** (Empty text box)
- Help Text:** (Empty text box)
- Required:** ☐ Always require a value in this field in order to save a record
- Unique:** ☐ Do not allow duplicate values
 - ☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
 - ☐ Treat "ABC" and "abc" as different values (case sensitive)
- External ID:** ☐ Set this field as the unique record identifier from an external system
- Auto add to custom report type:** ☒ Add this field to existing custom report types that contain this entity
- Default Value:** Show Formula Editor

The bottom of the screen shows the Windows taskbar with the search bar and system tray.

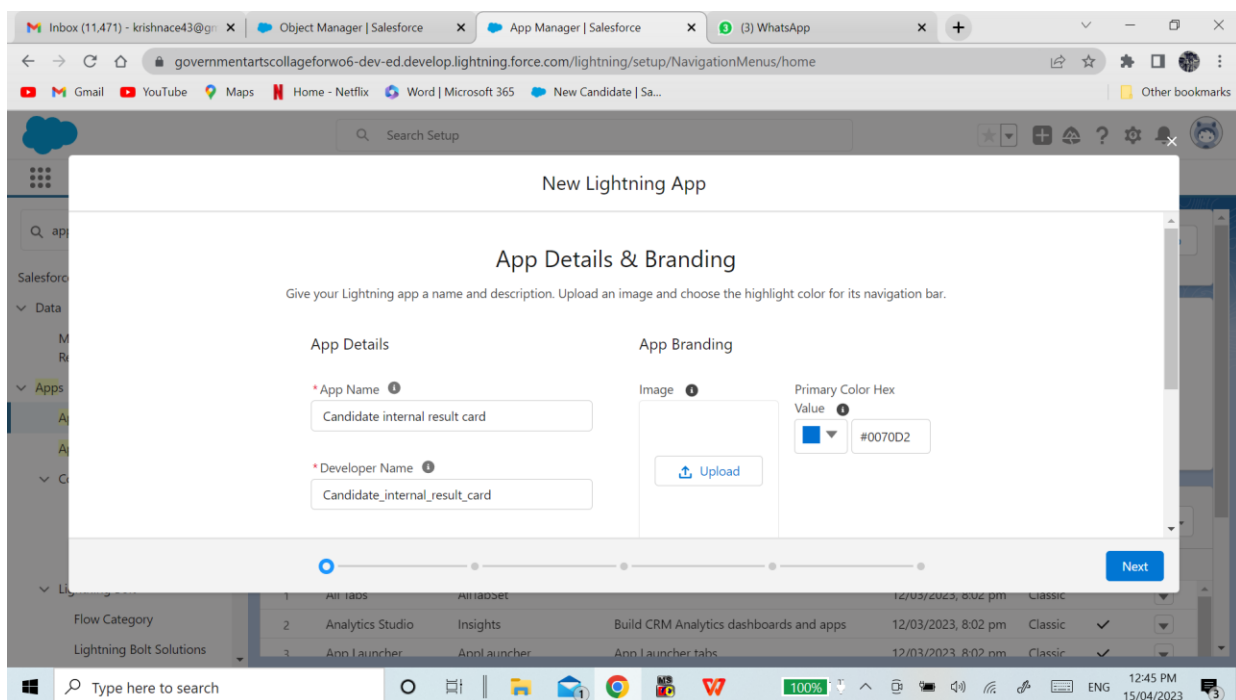
Similarly Create the other data.

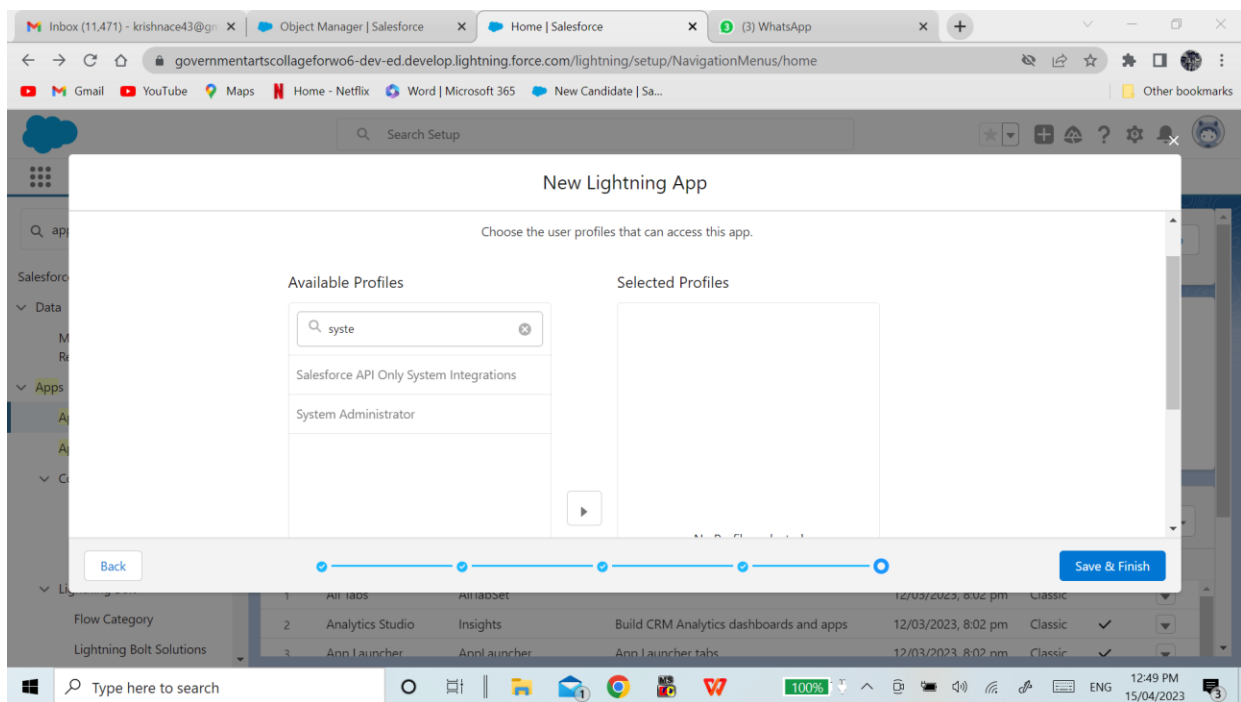
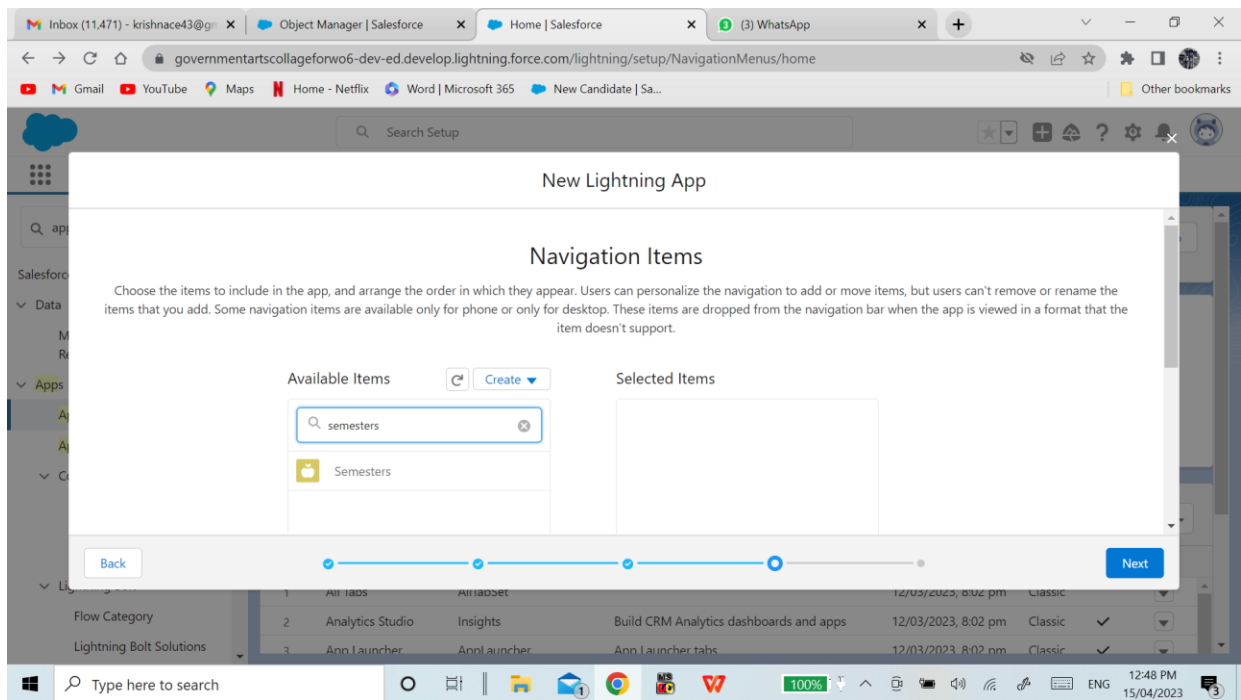
Activity IV:

Lightning App

Apps in Sales force are a Group of tabs that help the Application function by working together as unit. It as Name a Logo and a particular set of Tabs. The Simplest app Usually has just Tabs

Setup → App Manager → Quick Find → Select App Manager → New Lightning App → Fill the App Name in App Details and Branding → Next → Next → Next → Add System Administrator → Next → Select the items from the search bar and move it using the arrow button → Next → Search Profiles in Search bar → Click on the Arrow Button → Save and Finished.





ACTIVITY V:

USERS

A Users is Anyone who logs in to Sales force. Users or employs at your Company such as Sales reps, Managers, IT Specialist.

Who need Access to the Company Records. Every User in Sales force Has User account.

Quick Find / Search...
Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started

Salesforce Mobile Quick Start

Home

Administer
Release Updates
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Permission Set Groups
User Management Settings
Profiles

New User

User Edit
Save Save & New Cancel

General Information

First Name Sivakumar
Last Name Divya
Alias sdivy
Email divyammuma@gmail.com
Username divyammuma@gmail.com
Nickname User168154432127729968
Title
Company
Department
Division

Role <None Specified>
User License Salesforce Platform
Profile Standard Platform User
Active ☒
Marketing User ☐
Offline User ☐
Knowledge User ☐
Flow User ☐
Service Cloud User ☐
Site.com Contributor User ☐
Site.com Publisher User ☐
WDC User ☐
Data.com User Type --None--
Data.com Monthly Addition Limit Default Limit (300)
Accessibility Mode (Classic Only) ☐
High-Contrast Palette on Charts ☐

Type here to search

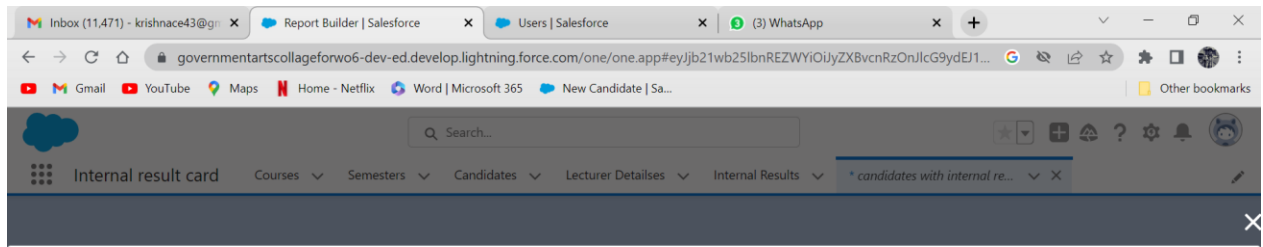
01:10 PM
15/04/2023

ACTIVITY VI:

REPORTS

A Report is a List of Records that meet the criteria you define. It's Displayed in sales force 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 said to read only or read/ write.

Go to the App →Report tab →Select report Type →Start Report
→Save



Create Report

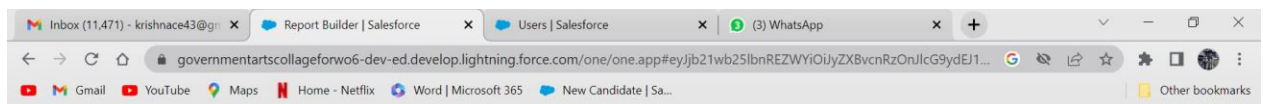
Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns

Select a Report Type

Recently Used Report Types

Report Type Name	Category
Candidates with Internal Result	Standard

Details
Candidates with Internal Result
Standard Report Type
[Start Report](#)
Details Fields (26)
Created By You
candidates with internal result



REPORT
New Report **Candidates with Internal Result** [Add Chart](#) [Save & Run](#) [Save](#) [Close](#) [Run](#)

Outline **Filters** **1**
Groups
GROUP ROWS
Add group...
Columns
Add column...
Candidate: Candidate Name
Candidate ID
Semester Name
Internal Result: Course ID
Internal Result: Marks

Previewing a limited number of records. Run the report to see everything.

	Candidate: Candidate Name	Candidate ID	Semester Name	Internal Result: Course ID	Internal Result: Marks	Internal Result: Internal Result Na
1	Hemapriya	200507	5th semester	maths	78	pass
2	Divya.S	200506	5th semester	maths	200	pass
3	Deepa	200504	5th semester	maths	90	pass
4	Divya.m	200505	5th semester	maths	56	pass
5	shalini	200522	5th semester	maths	100	pass

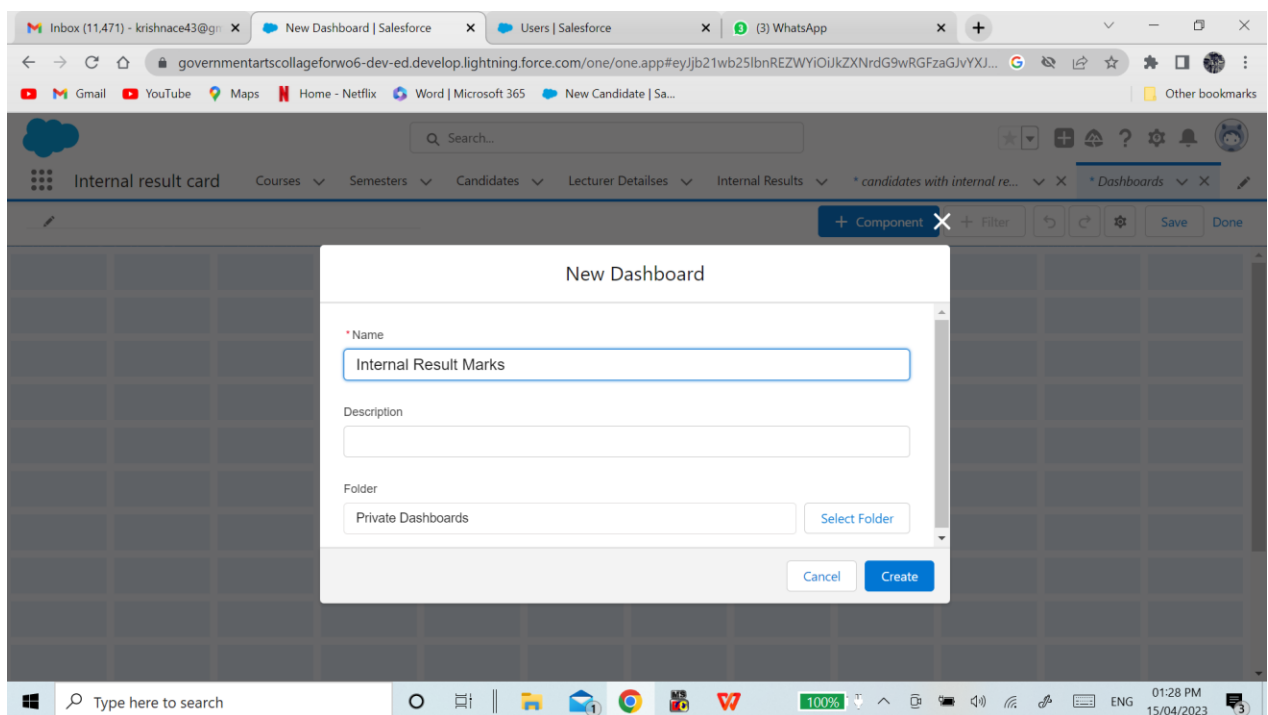
Update Preview Automatically ☒



ACTIVITY VII:

DASHBOARD

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.



Internal Result Marks | Salesforce

Search...

Internal result card Courses Semesters Candidates Lecturer Details Internal Results *candidates with internal re... Dashboards

Internal Result Marks + Component + Filter Save Done

Select Report

Reports

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

Select Report

Search: can

1 result

candidates with internal result
Divya Divya - 12-Apr-2023, 11:53 am - Private Reports

Cancel Select

Type here to search

100% 01:28 PM 15/04/2023

Internal Result Marks | Salesforce

Search...

Internal result card Courses Semesters Candidates Lecturer Details Internal Results *candidates with internal re... Dashboards

Internal Result Marks + Component + Filter Save Done

Add Component

Report

candidates with internal result

☐ Use chart settings from report

Display As

123

Preview

candidates with internal result

Record Count

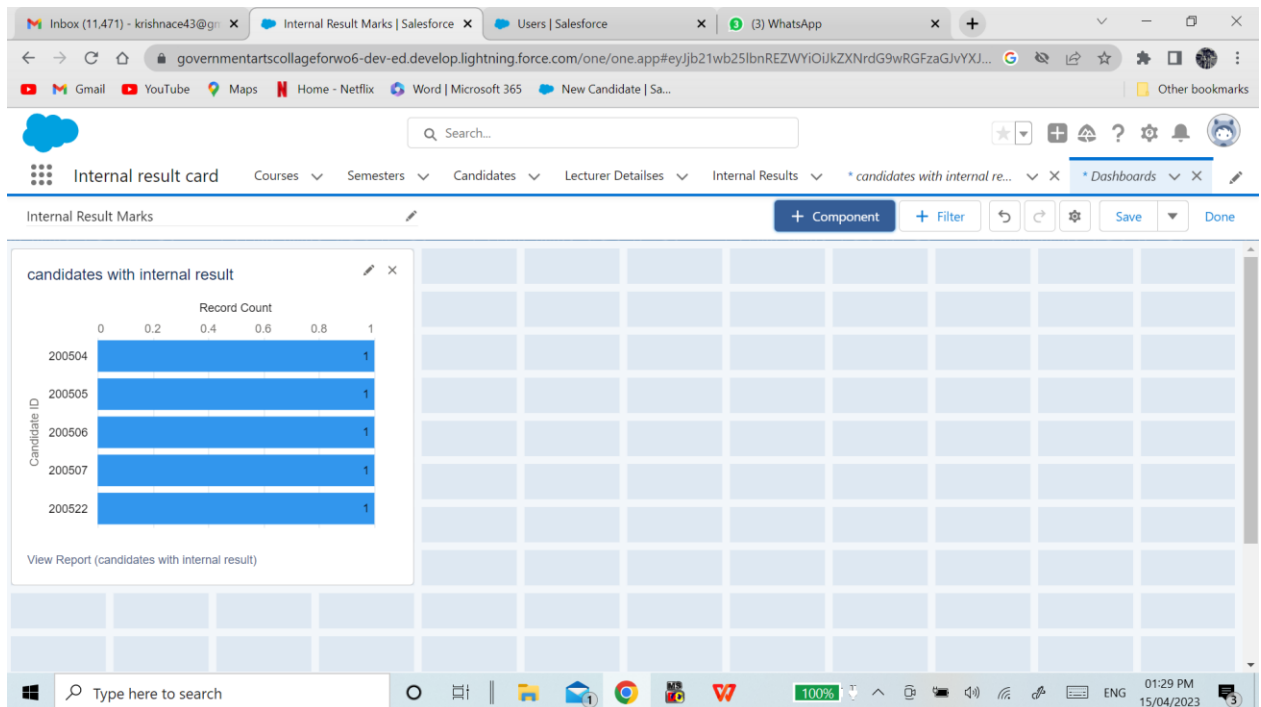
	0	0.2	0.4	0.6	0.8	1
Candidate ID	200504					1
	200505					1
	200506					1
	200507					1
	200522					1

View Report (candidates with internal result)

Cancel Add

Type here to search

100% 01:29 PM 15/04/2023



4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead : <https://trailblazer.me/id/dammu12>

Team Member1: <https://trailblazer.me/id/deepa253>

Team Member2: <https://trailblazer.me/id/divya2427>

Team Member3: <https://trailblazer.me/id/hganesan8>

5.ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

- * CRM allows for more effective sales and marketing.
- *CRM Can Speed up The Sales conversation Process.
- *CRM increases staff and candidate productivity, Lower time costs and boosts moral.

- *CRM enables widely dispersed teams to work closely.
- *CRM can improve Customer loyalty through exceptional experience.

DISADVANTAGES:

- *Staff over-reliance on CRM may diminish customer loyalty through a bad experience
- *Security Concerns associated with centralised data.
- *Excess initial time and productivity cost of implementation.
- *CRM requires a process-Driven Sales organisation.
- *CRM may not Suit every Business.

6.APPLICATION:

- * Tracking Customers
- * Collecting data for Marketing
- *Improving interactions and communications.
- *Streamlining internal sales processors

7.CONCLUSION:

- * Customer Relationship Management (CRM) is a technology of managing all you company's relationship and interactions with Customers and potential customers.

* The goal is simple improve business relationship a CRM system helps companies stay connected to customers, Stream lines processes and improve profitability.

8.Future scope:

* The future of CRM is about which companies will be able to pivot to meet the changing needs and trends-driven by customer expectations.

* The scope of CRM includes a wide range of activities from managing customers contact information to developing personalized marketing campaigns.