

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARK



GOVERNMENT OF TAMILNADU

Naan Muthalvan - Project-Based Experiential Learning

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

Project Based Experimental Learning Program

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M.V. MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

B (Affiliated to Mother Teresa Women's University, Kodai Kanal)

Reaccredited with" A" Grade by NAAC DINDIGUL-624001.

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- 624 001



PG & RESEARCH DEPARTMENT OF MATHEMATICS

BONAFIDE CERTIFICATE

This is to certify that this is a bonafide record of the project \entitled, “CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS “ Done by **Ms.K.HARIPRIYA-(20321TR009). Ms.G.DHANALAKSHMI-(20321TR006) Ms.M.DIVYADHARSHINI-(20321TR007) And Ms.S.FARHANA AASHMI-(20321TR008).** This is submitted in partial fulfillment for the award of the degree of **Bachelor of Science in Mathematics in M.V. MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL** during the period of December 2022 to April 2023.



Project Mentor(s)



Head of the Department

Submitted for viva-voce Examination held on 12.04.2023

INTERNAL EXAMINER

EXTERNALEXAMINER

1. INTRODUCTION

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the **clouds**.

1.1 OVERVIEW:

This project helps you to candidate with internal marks.

1.2 PURPOSE:

semester

candidate

course details

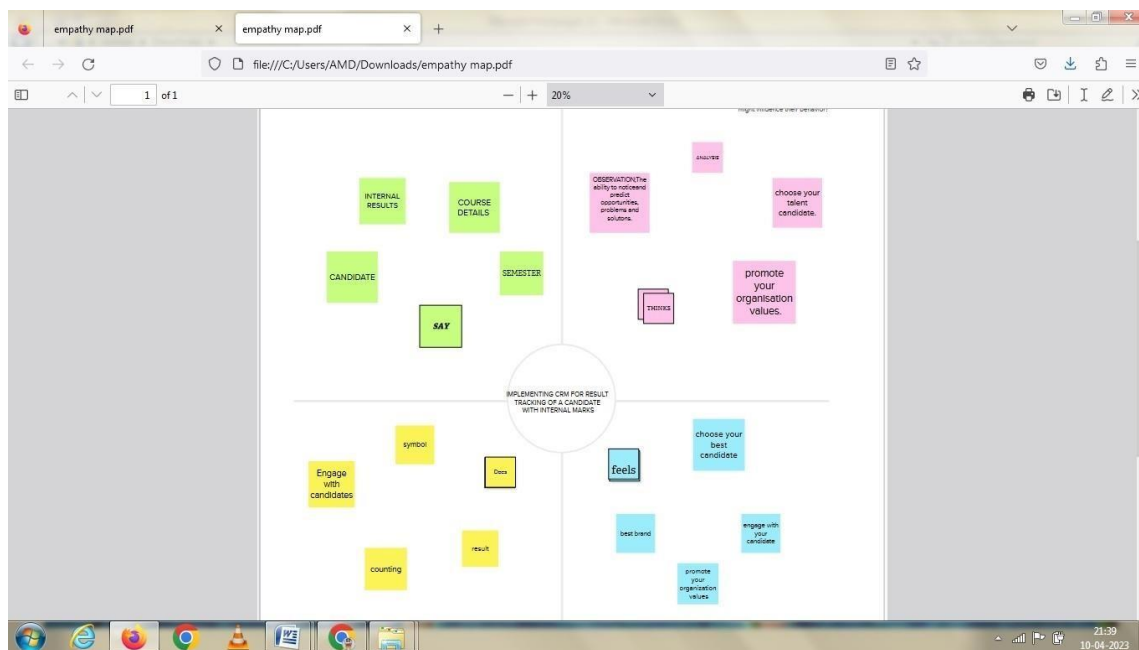
Lecturer details

Internal results

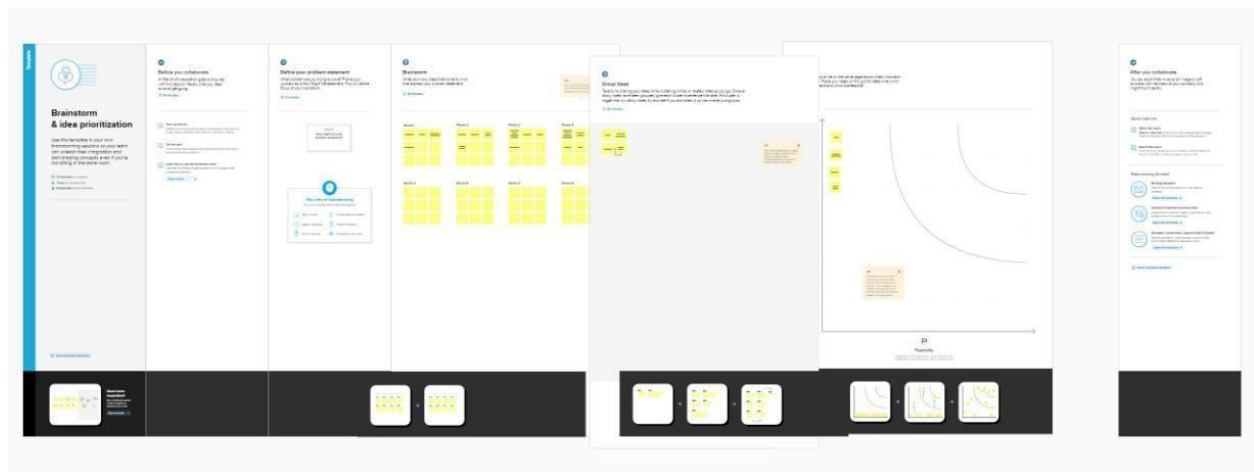
2. PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP:

An empathy map is a collaborate tool teams can use to gain a deeper insight into their customers. Much like a user person, an empathy map can represent a group of users, such as a customer segment.



2.2 IDEATION & BRAINSTROMING MAP:



3. Result

3.1 DATA MODEL:

object name	Fields in the object	
obj 1	Field label	Data type
	semester	customer object
	candiate	customer object
obj 2	Field label	Data type
	course details	customer object
	lecturer details	customer object
	internel results	customer object

3.2 ACTIVITY AND SCREENSHOT

MILESTONE-1:

ACTIVITY: Creating a developer Account

Creating a developer org in salesforce,

1. Go to developers.salesforce.com/ 2. Click on sign up.
3. On the sign up form, enter the following details : a. First name & Last name a.
Email
b. Role : Developer
c. Company : College Name d. Country : India
e. Postal Code : pin code
f. Username : should be a combination of your name and company

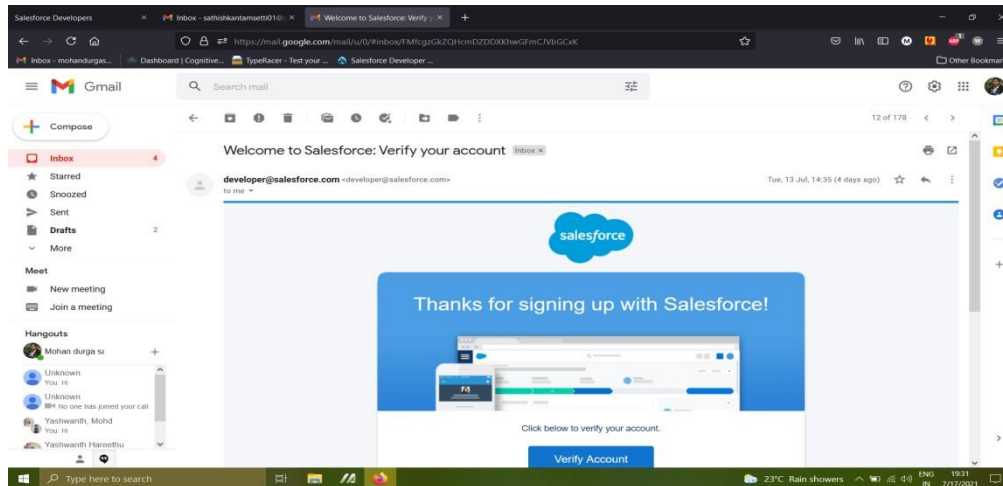
This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign up after filling these.



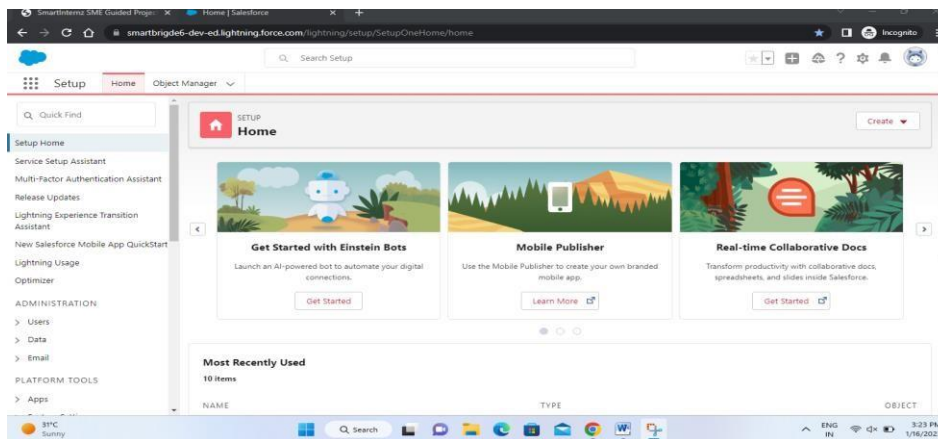
Account Activation:

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as

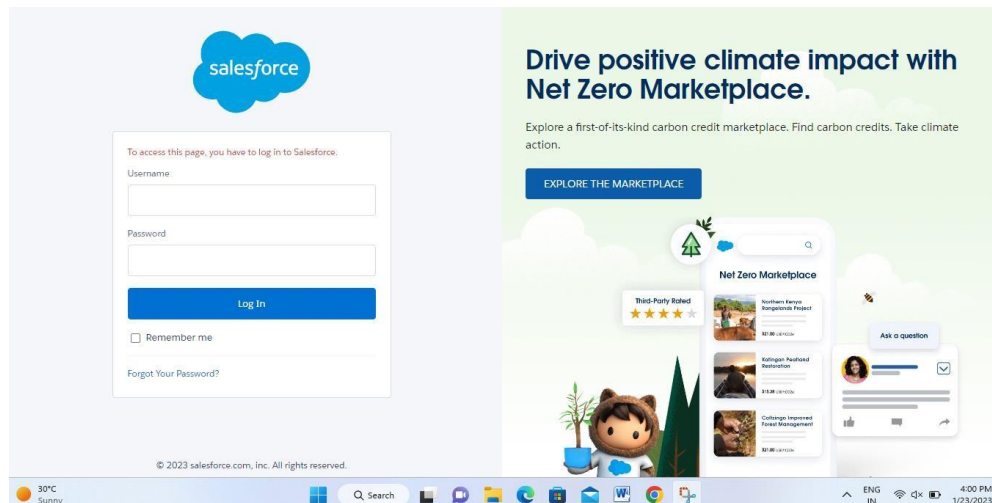


Login To Your Salesforce Account:

- 1.Go to [salesforce.com](https://login.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.



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



Milestone-2:

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.

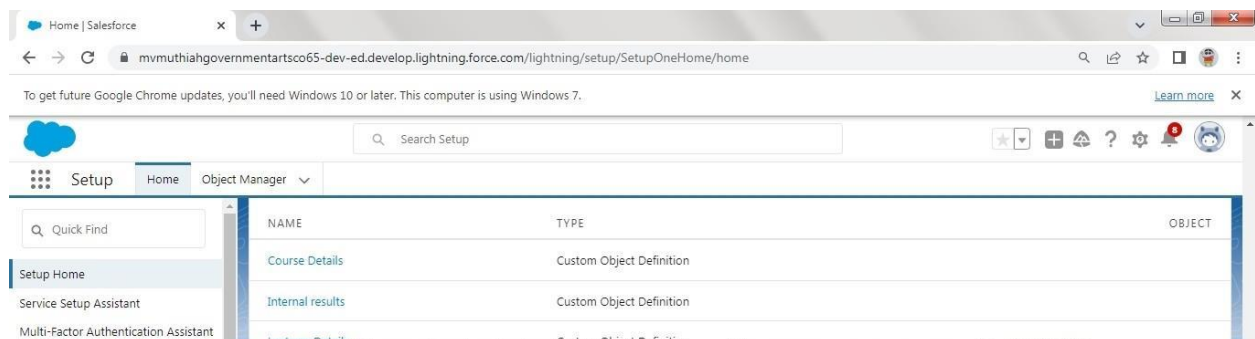
On the Custom Object Definition page, create the object as follows:

- 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.



Milestone-2:

FIELDS AND RELATIONSHIP 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. To create fields in an object:

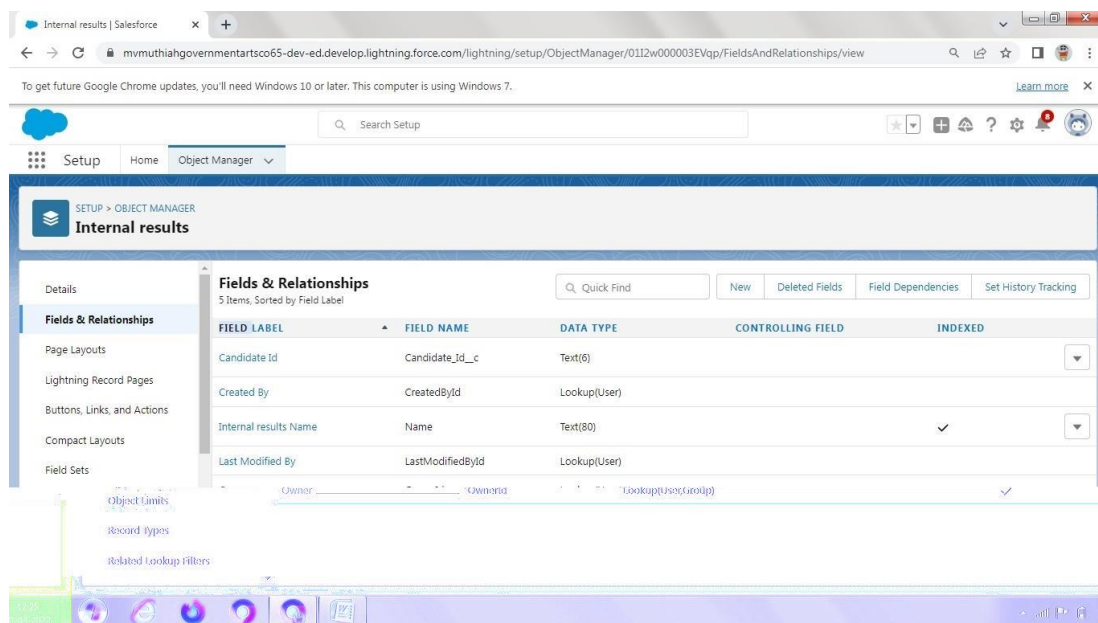
Go to setup → click on Object Manager → type object name in search bar → click on the object.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' page for the 'Internal results' object. It shows a table of existing fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The table lists six fields: Candidate Id, Course Id, Created By, Internal results Name, Last Modified By, and Owner. The 'Internal results Name' and 'Owner' fields are marked as indexed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Id	Candidate_Id__c	Text(6)		
Course Id	Course_Id__c	Text(8)		
Created By	CreatedById	Lookup(User)		
Internal results Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Activity-2:

Similarly Create Following Fields according to the objects.



Milestone-3: Lightning

App Activity-1:

Create the Candidate Internal Result Card app:

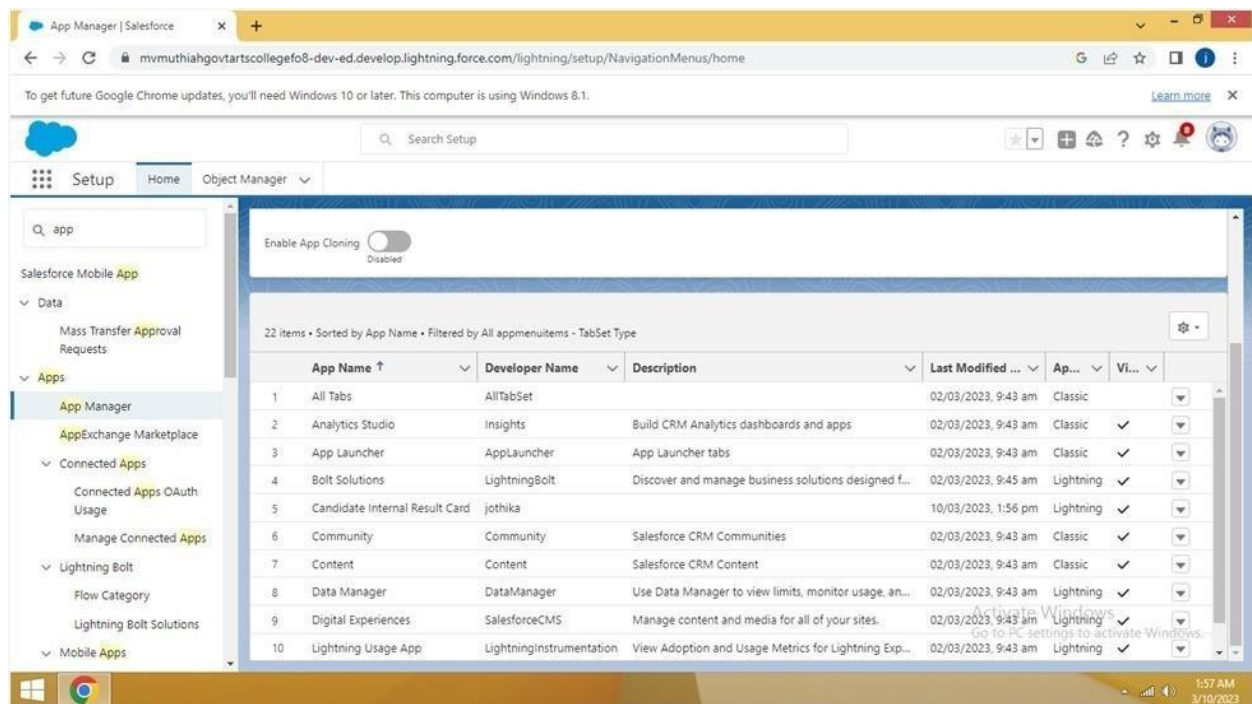
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Candidate Internal Result Card as the App Name, then click Next
- Under App Options, leave the default selections and click Next. ● Under Utility Items, leave as is and click Next.

- From Available Items, select Semester, Candidate, Course Details, Lecturer Details, Internal Results 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 .

To create a lightning App page:

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

New lightning App:



The screenshot shows the Salesforce App Manager interface. The left sidebar contains a search bar with 'app' entered and a list of categories including Data, Apps, AppExchange Marketplace, Connected Apps, Lightning Bolt, and Mobile Apps. The main area displays a table of 22 items, sorted by App Name. The 'Candidate Internal Result Card' is highlighted in the list.

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		02/03/2023, 9:43 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	02/03/2023, 9:43 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	02/03/2023, 9:43 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed f...	02/03/2023, 9:45 am	Lightning	✓
5	Candidate Internal Result Card	jothika		10/03/2023, 1:56 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	02/03/2023, 9:43 am	Classic	✓
7	Content	Content	Salesforce CRM Content	02/03/2023, 9:43 am	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, an...	02/03/2023, 9:43 am	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	02/03/2023, 9:43 am	Lightning	✓
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Exp...	02/03/2023, 9:43 am	Lightning	✓

MILESTONES-4: USERS ACTIVITY1:

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 License 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 temporary password emailed to your email.

The screenshot displays the Salesforce 'Users' management interface. The left sidebar contains a navigation menu with 'Users' selected. The main content area shows a table of users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'HARIPRIYA_K', 'K_HARIPRIYA', 'User Intervention', and 'User Security'. The 'Active' column shows checkmarks for all listed users. The 'Profile' column lists roles like 'Chatter Free User', 'System Administrator', 'Standard User', 'Analytics Cloud Integration User', and 'Analytics Cloud Security User'. The top navigation bar includes 'Setup' and 'Home' tabs, and a search bar. The bottom status bar shows the system time as 02:40 on 06-04-2023.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_0062w00000rksbeah@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	HARIPRIYA_K	KHAR	kanaparaharipriya000@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	K_HARIPRIYA	kk	kanaparaharipriya00@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	User Intervention	intev	intervention@0062w00000rksbeah.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	ina0000security@0062w00000rksbeah.com		✓	Analytics Cloud Security User

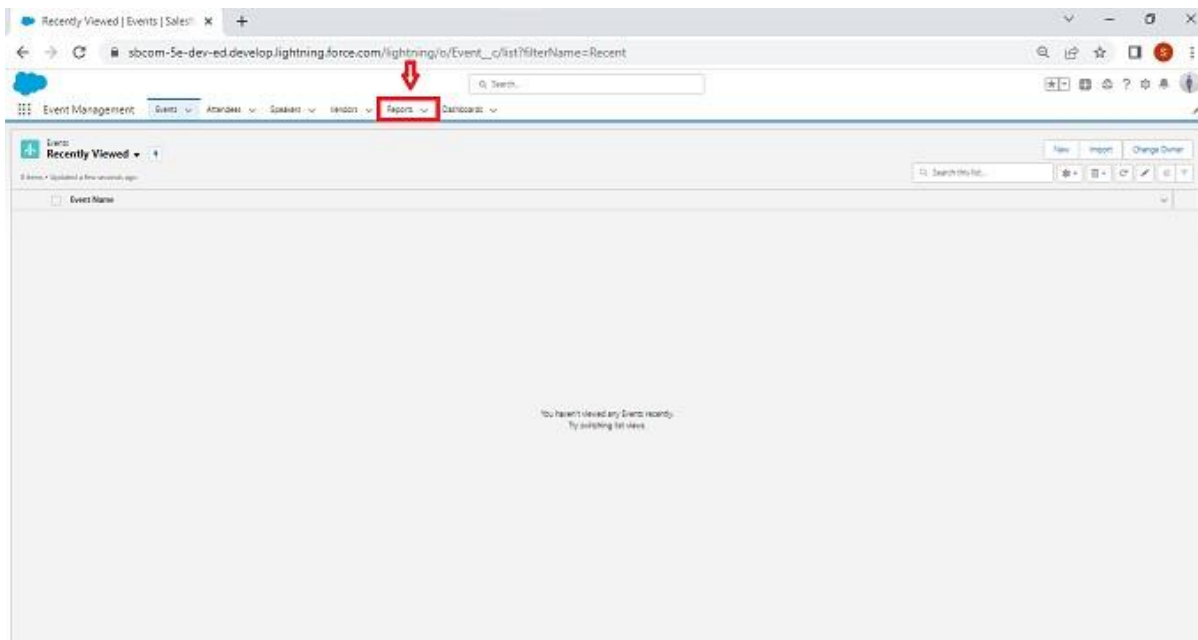
Milestone-5:Reports

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 click and 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

Dashboard candidate board internal mark: ⚠ Last refreshed 5 days ago. Refresh this dashboard to see the latest data. As of 01-Apr-2023, 11:13 am-Viewing as K HARIPRIYA				
Candidate History Report				
Candidate: Owner Name	Edited By	Field / Ex	New V:	Edit Date
K HARIPRIYA	K HARIPRIYA	Created	-	29/03/2023, 1:24
View Report (Candidate History Report)				
Candidate History Report				
Candidate: Owner Name	Edited By	Field / Ex	New V:	Edit Date
K HARIPRIYA	K HARIPRIYA	Created	-	29/03/2023, 1:24
View Report (Candidate History Report)				

ADVANTAGE & DISADVANTAGE

ADVANTAGES

- It allows for more effective sales and marketing.
- It can speed up the sales conversion process.
- It increases staff productivity, lowers time costs and boosts morale.
- It enables widely dispersed teams to work closely.
- Can improve customer loyalty through exceptional experience.

DISADVANTAGES

- Staff over- reliance on CRM may diminish customer loyalty through a bad experience.
- It may not suit every business.
- It requires a process drive and sales organization.
- The excess initial time and productivity cost are implemente
- Security consents associated with centralized data.

APPLICATIONS

CRM through seamless dynamics 365 applications.

- Organization
- Efficiency
- Better time management
- Impressed clients

CONCLUSION

- Customer relationships develop over time.
- CRM requires a cultural change with organization.
- If CRM is used it must be with the backing of those at the highest level and it must be planned carefully.
- The role of global salespeople in the process is that of both relationship builders and relationship promoters.

FUTURE SCOPE

- Sales management
- Customer retention
- Leads management
- Task management
- Social media management
- Contact management
- Big data & best in class suits
- Social & Mobile CRM for sentiment analysis and influence • Artificial intelligence to uncover market insights
- CRM strategies for the intelligent customer.

