

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

- **Project Based Experimental Learning Program**

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

- **APRIL 2023**

- **1. INTRODUCTION**

- Salesforce is a cloud-based software company that provides to develop their own applications without following in the legacy system.
- The software or application once created can be uploaded onto the cloud allowing the end -users to review them

- **1.1 OVERVIEW:**

- This project helps you to candidate with internal marks.

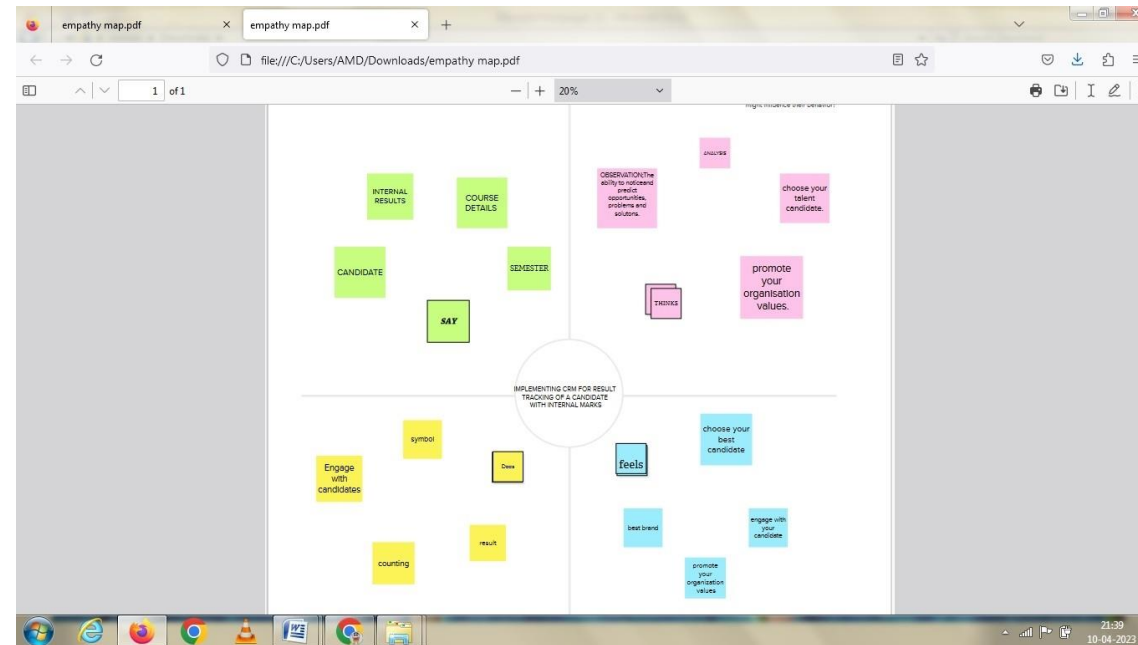
- **1.2 PURPOSE:**

- - semester
- - candidate
- - internal marks
- - lecturer details
- - course details
-

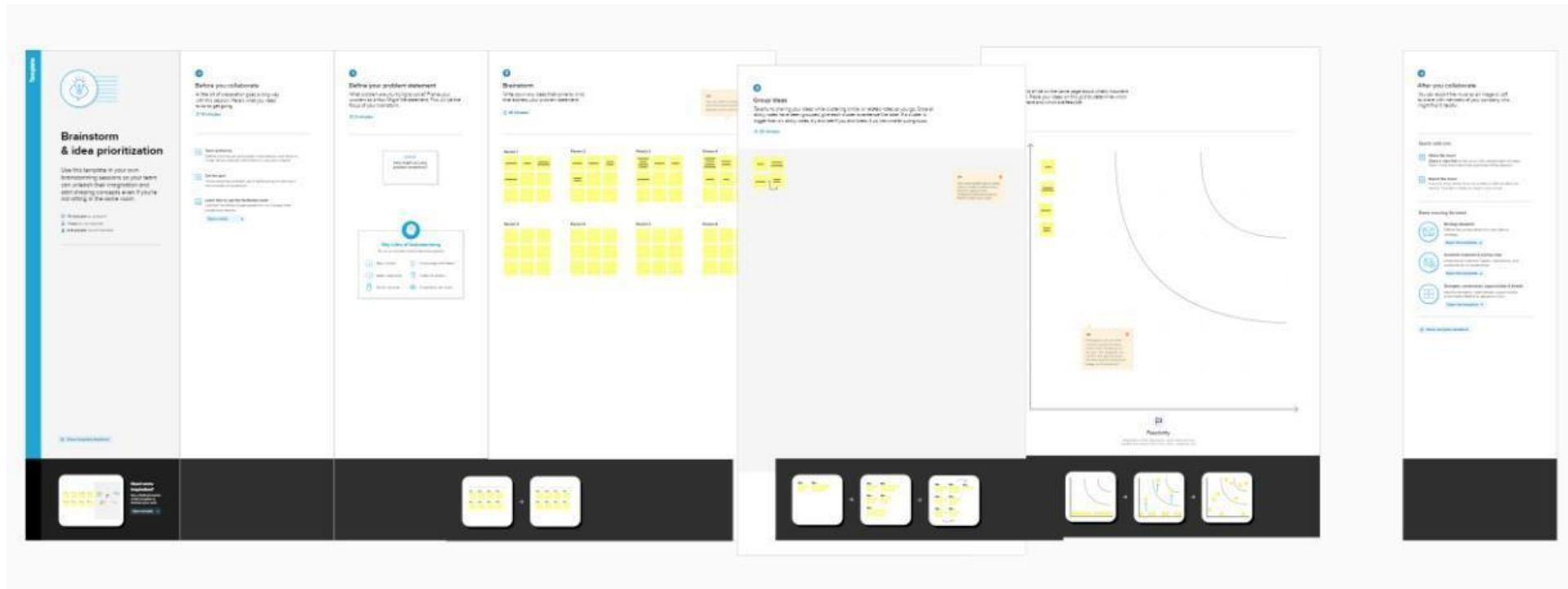
- **2. PROBLEM DEFINITION & DESIGN THINKING**

- **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 segmen



- 2.2 IDEATION & BRAINSTORMING MAP:



- 3.RESULT

- 3.1 DATA MODEL:

object name	Fields in the object	
obj 1	Field label	Data type
	semester	customer object
	<u>candiate</u>	customer object
obj 2	Field label	Data type
	course details	customer object
	lecturer details	customer object
	<u>internel results</u>	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. County : 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.

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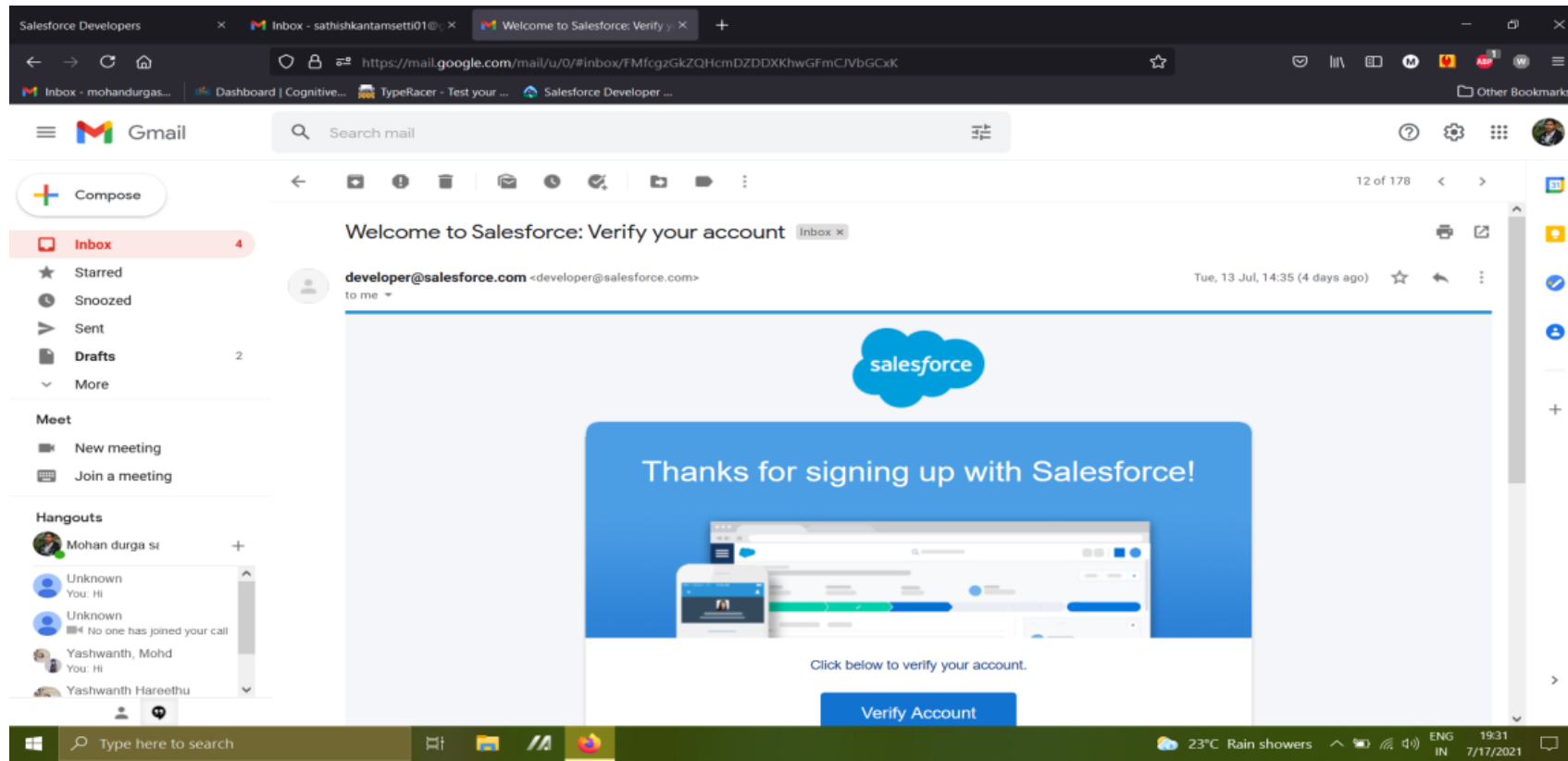
Street Address

Street Code

Street Label

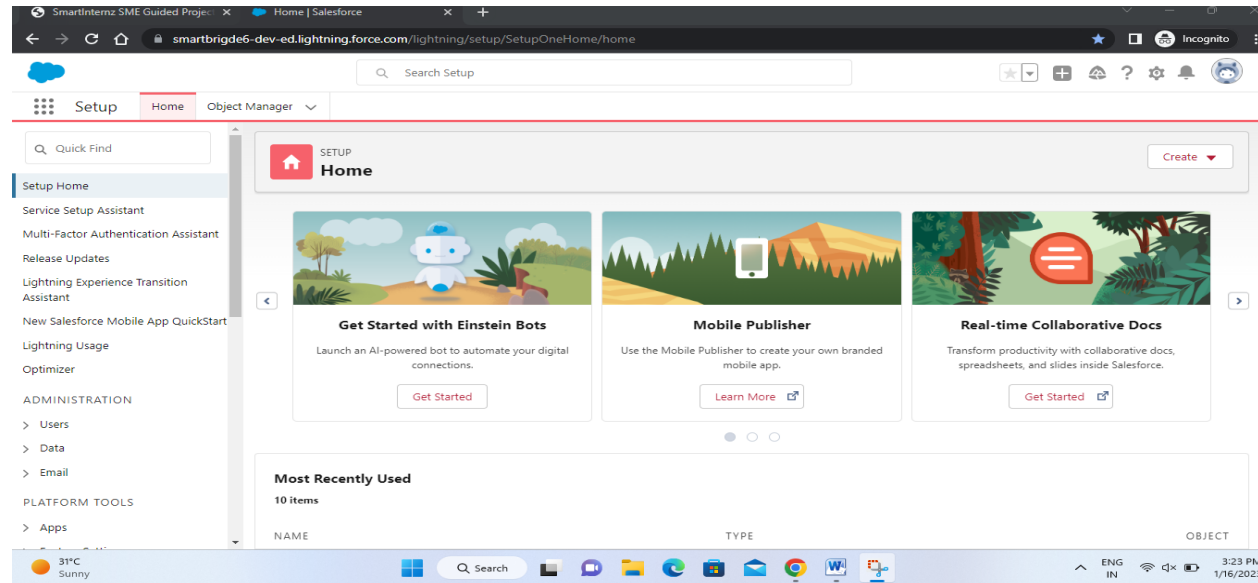
Account Activation:

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 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>



To access this page, you have to log in to Salesforce.

Username

Password

Log In

☐ Remember me

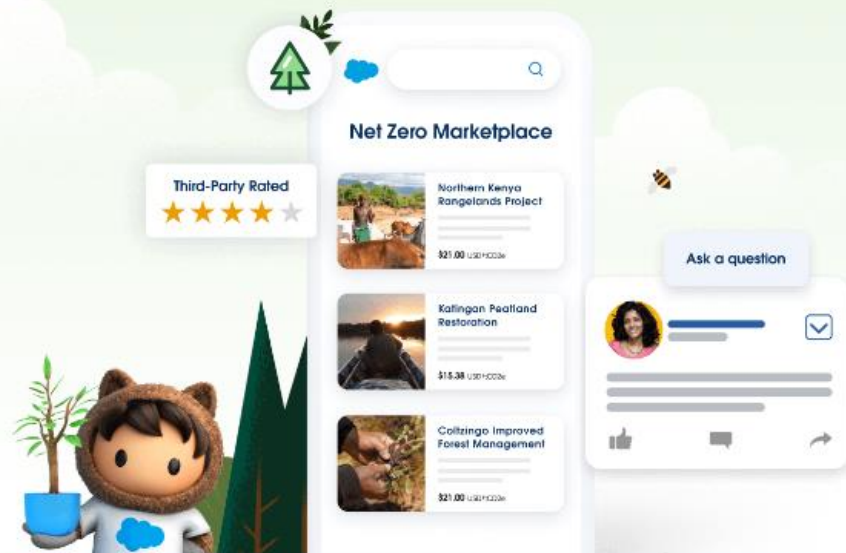
[Forgot Your Password?](#)

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EXPLORE THE MARKETPLACE



30°C
Sunny



Search



ENG
IN



4:00 PM
1/23/2023

Milestone-2:

ACTIVITY-1:

ToCreate 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.

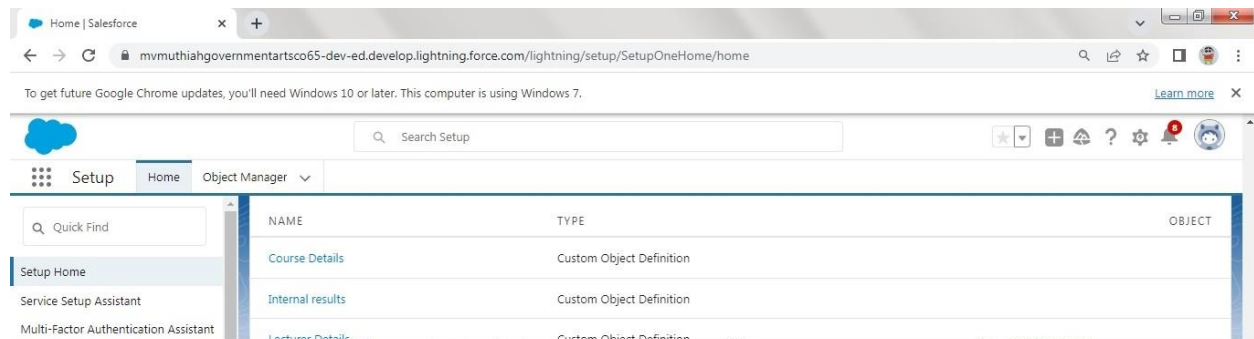
On the Custom Object Definition page, create the object as follows:

- 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.

Internal results | Salesforce

+

mvmutiahgovernmentartsco65-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003EVqp/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Internal results

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

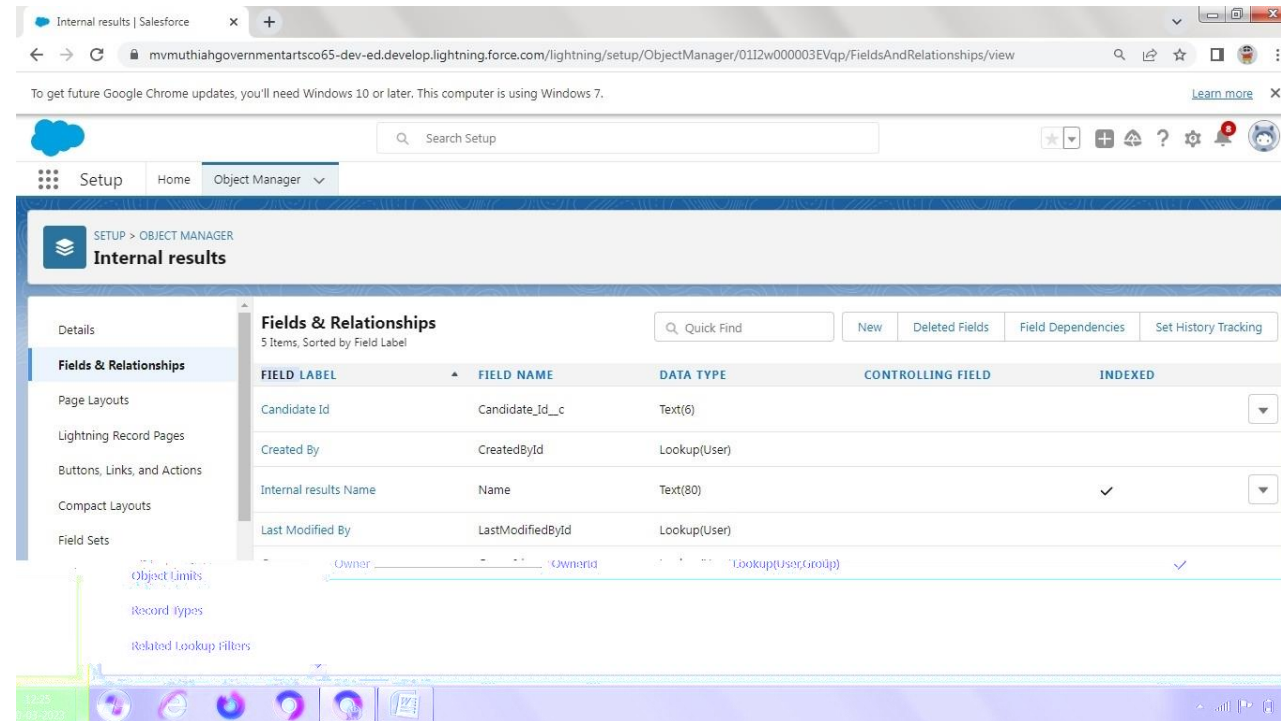
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Id	Candidate_Id__c	Text(6)		
Course Id	Course_Id__c	Text(8)		
Created By	CreatedById	Lookup(User)		
Internal results Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Windows Taskbar

12:27 10-03-2023

Activity-2:

Similarly Create Following Fields according to the objects.



The screenshot displays the Salesforce Object Manager interface for the 'Internal results' object. The left sidebar shows navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'Fields & Relationships' and shows 5 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Id	Candidate_Id__c	Text(6)		
Created By	CreatedById	Lookup(User)		
Internal results Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		

Below the table, there are links for 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The bottom of the screen shows the Windows taskbar with the time 13:35 on 14-09-2022.

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 in a web browser. The browser address bar displays the URL: `mvmuthiahgovtartscollegefo8-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The page title is "App Manager | Salesforce".

On the left sidebar, the "Apps" section is expanded, showing a list of installed apps. The "App Manager" link is highlighted. The main content area displays a table of installed apps, sorted by App Name. The table has columns: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists 10 apps, including All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Candidate Internal Result Card, Community, Content, Data Manager, Digital Experiences, and Lightning Usage App.

At the top of the main content area, there is a toggle switch for "Enable App Cloning" which is currently disabled. Below the toggle, the text "22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type" is displayed.

	App Name	Developer Name	Description	Last Modified	App Type	Visibility
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	✓

The bottom of the screen shows the Windows taskbar with the time 1:57 AM and date 3/10/2023.

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.

(no subject) - kanagarajharipriya

Users | Salesforce

mvmtuthiahgovernmentartsc-4d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Google

Star

Home

More

Search Setup

Setup

Home

Object Manager

USER

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users

Edit

Create New View

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty_00d2w00000rjvkbeah.0fvluaydggn@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	HARIPRIYA_K	KHARI	kanagarajharipriya000@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	K_HARIPRIYA	hk	kanagarajharipriya00@gmail.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00d2w00000rjvkbeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d2w00000rjvkbeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Activate Windows

Go to Settings to activate Windows.

Type here to search

26°C

Mostly cloudy

02:40

06-04-2023

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.

Recently Viewed | Events | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/o/Event__c/list?filterName=Recent

Event Management | Events | Attendees | Speakers | Vendors | **Reports** | Dashboards

Events
Recently Viewed

0 items • Updated a few seconds ago

Search this list...

Event Name

You haven't viewed any Events recently.
Try switching list views.

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 / Ev	New Vi	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 / Ev	New Vi	Edit Date
K HARIPRIYA	K HARIPRIYA	Created.	-	29/03/2023, 1:24

[View Report \(Candidate History Report\)](#)

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.



THANK YOU
