

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS.

INTRODUCTION

1.1 Overview:

Project Description:-

This should be able to create all base data including Semester, CandidateCourse 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 InternallResults,Re-evaluation Can be initialised by Candidate for all Internal Results.NowOnly dean can update the marks after re- evaluation

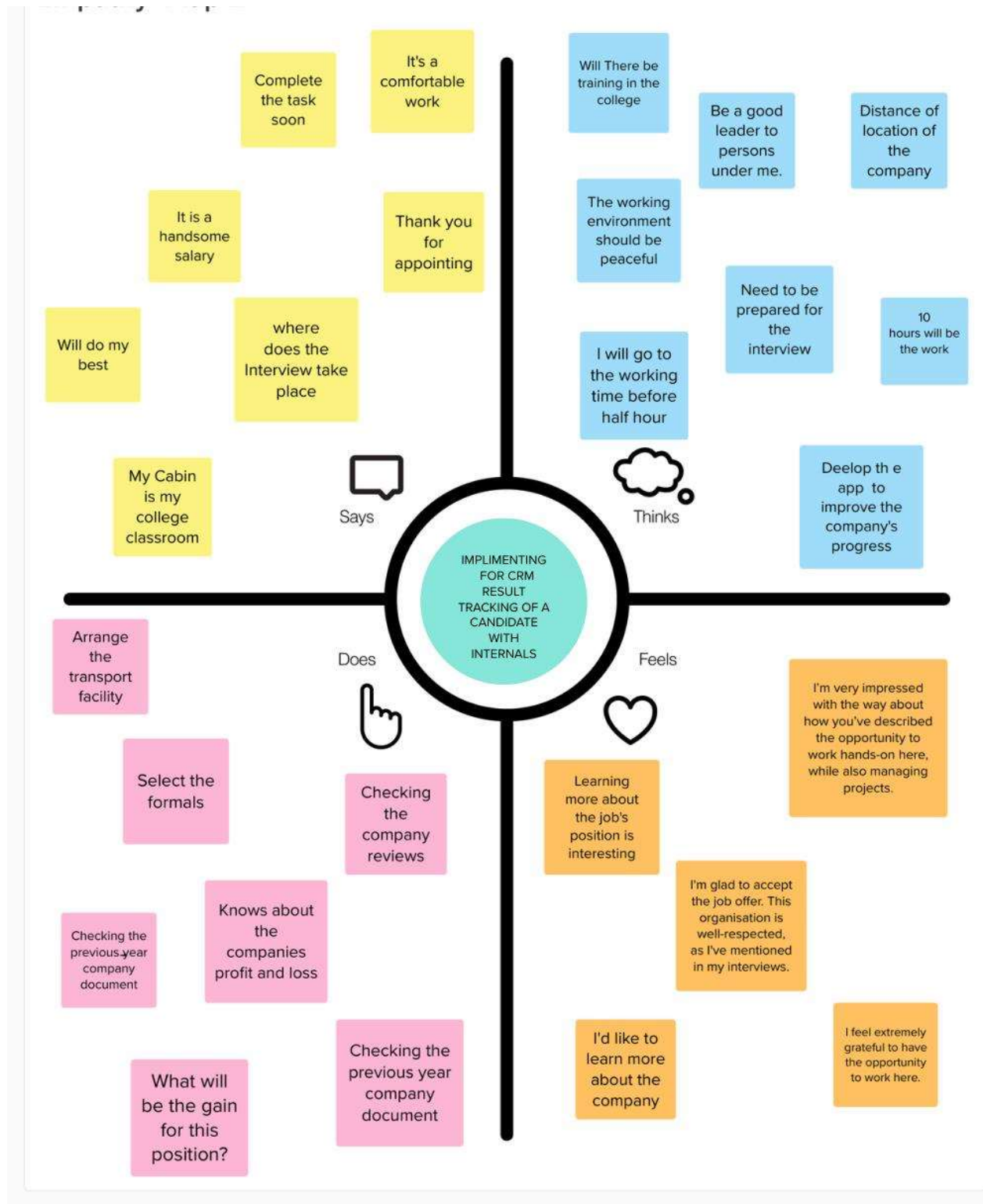
1.2 Purpose

CRM purpose and its importance

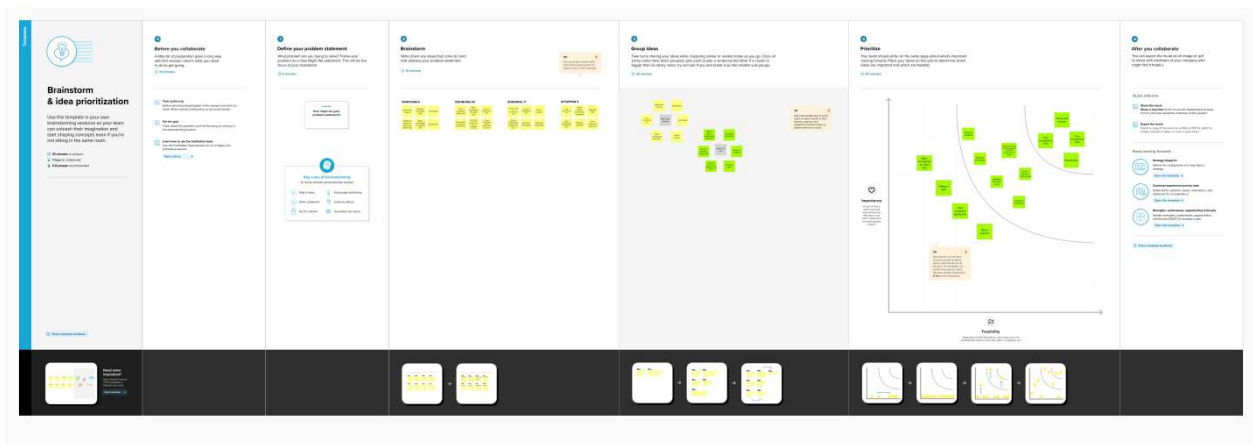
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability

Problem Definition & Design Thinking:

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



RESULT

OBJECT NAME	FIELD IN OBJECT	
Semester	FILED LABEL	DATA TYPE
	Semester Name	Text
Candidate	FILED LABEL	DATA TYPE
	Candidate Name	Text
Course Details	FILED LABEL	DATA TYPE
	Course Name	Text
Lecturer Details	FILED LABEL	DATA TYPE
	Lecturer Role	Text
Internal results	FILED LABEL	DATA TYPE
	Candidate ID	Text

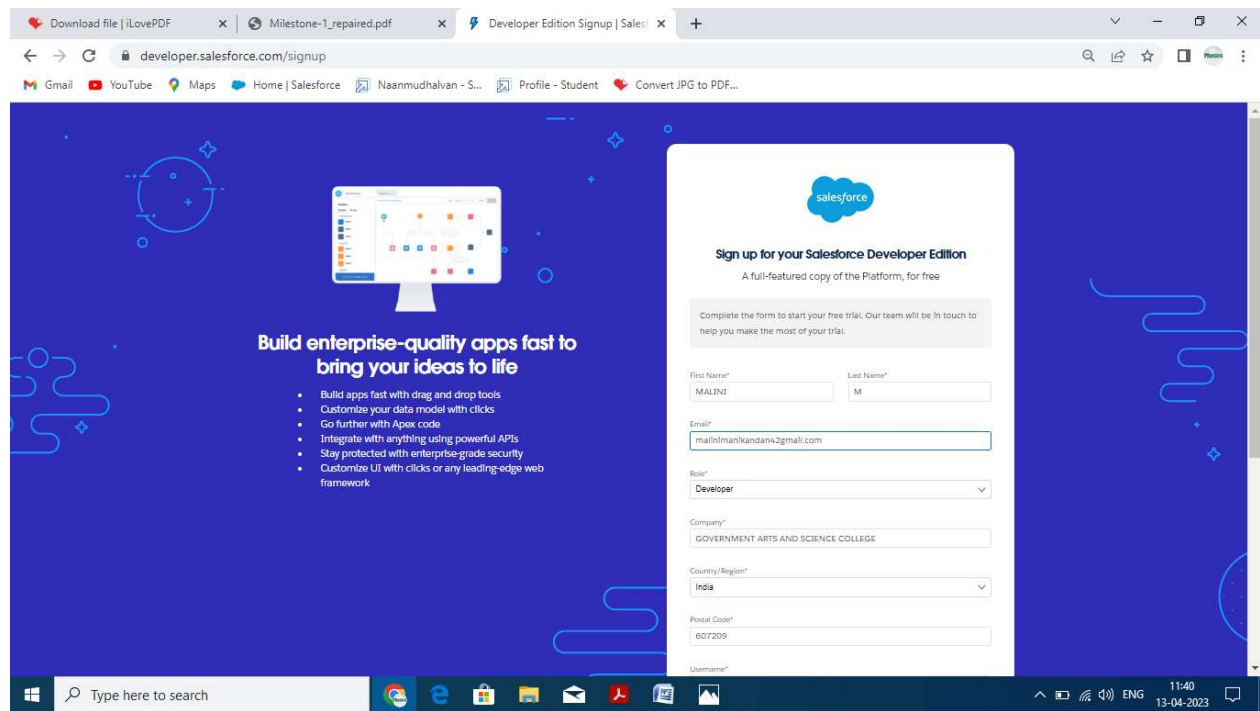
3.2 Activity & Screenshot

Milestone 1:Creation Salesforce Org:

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 cloud.

Activity 1:



Download file | iLovePDF x Milestone-1_repaired.pdf x Developer Edition Signup | Sales: x +

developer.salesforce.com/signup

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
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- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
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Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
MALINI

Last Name*
M

Email*
mainimanihandan@gmail.com

Role*
Developer

Company*
GOVERNMENT ARTS AND SCIENCE COLLEGE

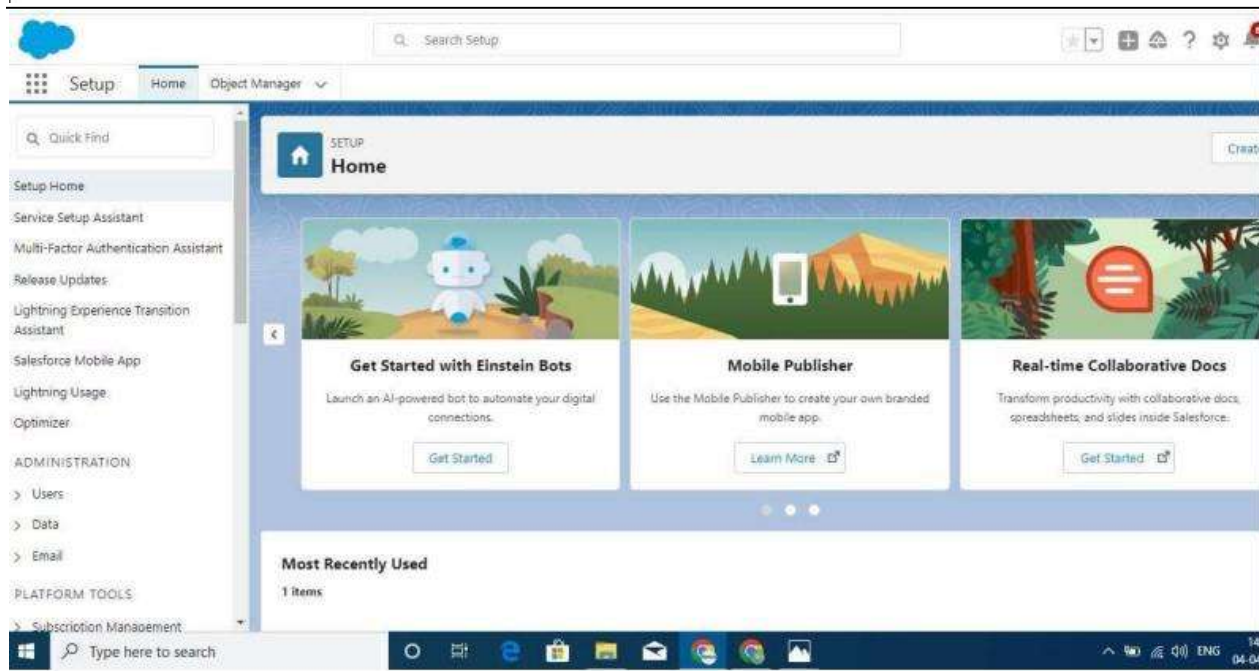
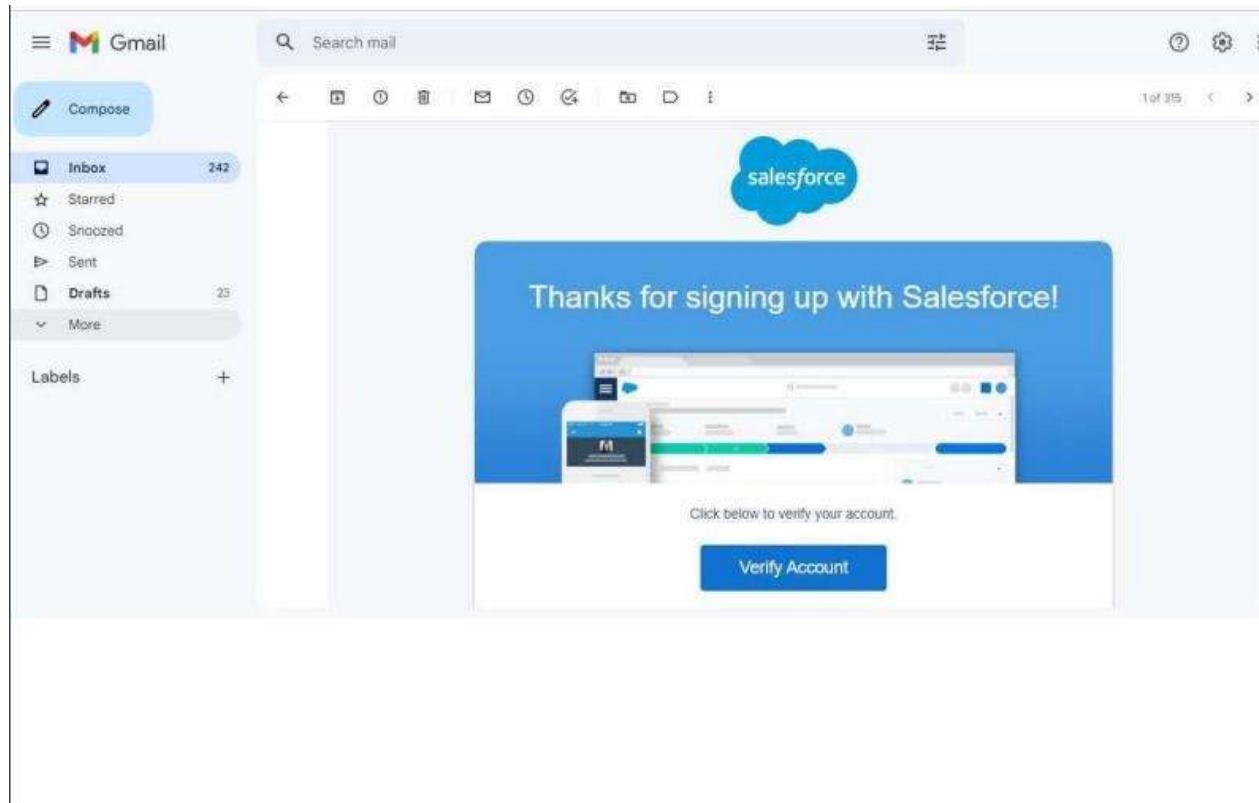
Country/Region*
India

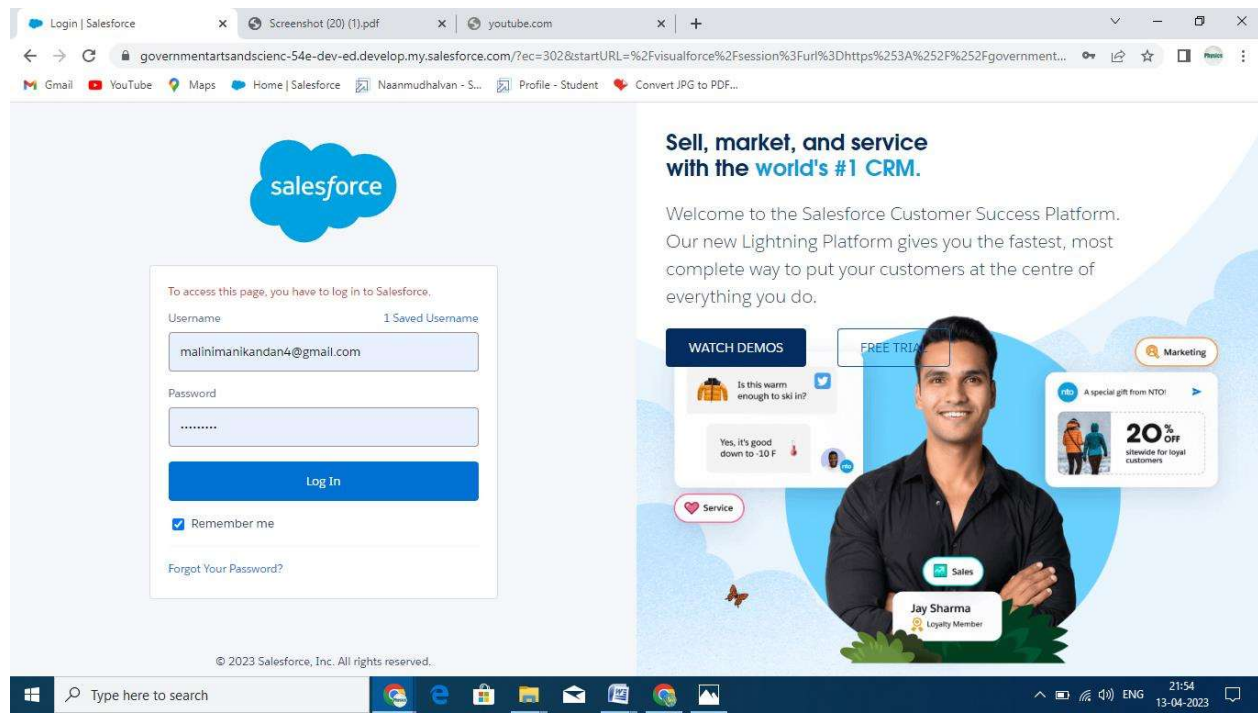
Postal Code*
607709

Username*

Type here to search

11:40
13-04-2023

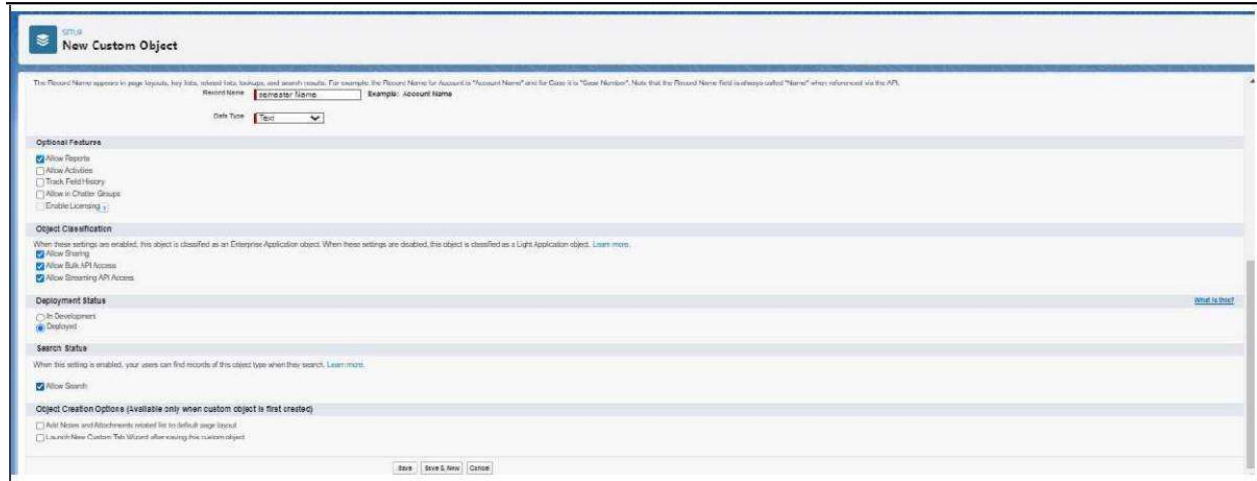
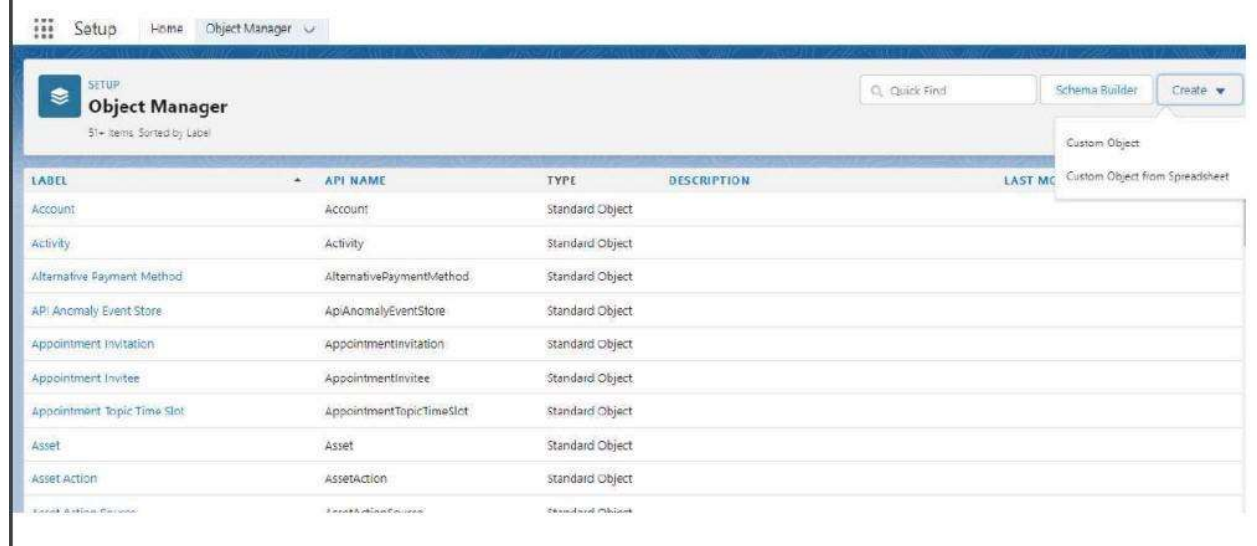
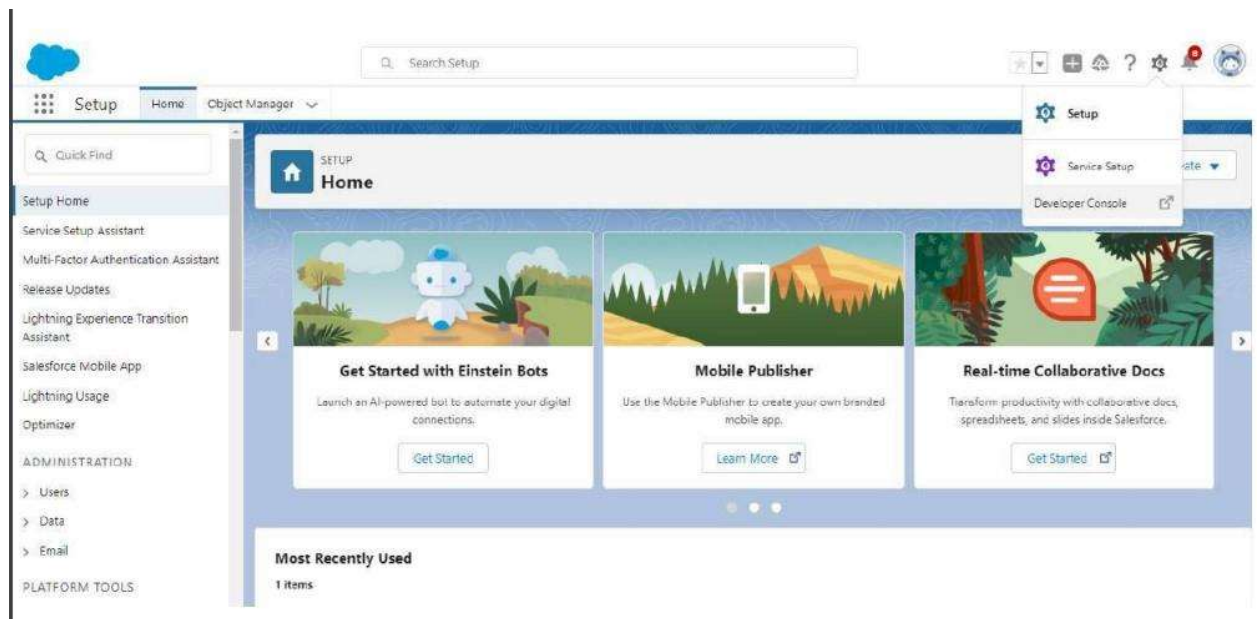




Milestone-2: Object

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.

Activity-1:



SETUP
New Custom Object

Custom Object Definition Edit. Save Save & New Cancel

Custom Object Information Required 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:

Contact-sensitive help setting: ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Custom 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

Date Type:

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Learning...

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER
semester

Details Edit Delete

Details

Description:

API Name:

Custom: ☒

Singular Label:

Plural Label:

Enable Reports: ☒

Track Activities: ☐

Track Field History: ☐

Deployment Status:

Help settings:

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 Layouts

Restriction Rules

Scoping Rules

Activity-2:

SETUP
New Custom Object

Custom Object Definition Edit. Save Save & New Cancel

Custom Object Information Required 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.

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Record Name: Example: Account Name

Date Type:


Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups



VIEW > OBJECT MANAGER

Candidate

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

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

Candidate__c

Custom

✓

Smaller Label

Candidate

Plural Label

Candidates

Enable Reports

✓

Track Activities

Track Field History

Employment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Course Detail

Details	
Description	
API Name: Course_Detail__c	Create Reports <input checked="" type="checkbox"/>
Custom	<input checked="" type="checkbox"/> Track Activities
W*	
Singular Label Course Detail	Track Field History <input type="checkbox"/>
Plural Label Course Details	Deployment Status Deployed
	Help Settings Standard Salesforce.com Map View/Dev

SETUP
New Custom Object

Permissions

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Locking

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 the custom object

SETUP > **OBJECT MANAGER**
Lecturer Detail

Details

Details

Tab | Settings

Details

Description

API Name: Lecturer__c

Custom

✓

Single Label: Lecturer Detail

Plural Label: Lecturer Details

Enable Reports: ✓

Track Activities:

Track Field History:

Deployment Status: Deployed

Help Settings: [Standard Salesforce.com Help Window](#)

Related Lookups Filter:

Search Layout:

List View Button Layout:

Record Types:

Related Lookups Filter:

Search Layout:

List View Button Layout:

Record Types:

Related Lookups Filter:

Search Layout:

List View Button Layout:

Record Types:

Milestone-3: Lightning App:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

Activity-1:

Setup > **Object Manager**

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 '21 release notes](#).

☐ Enable App Cloning

31 Items • Sorted by App Name • Filtered by All app namespaces • TabSet Type:

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible in...
1	All Tabs	AllTabSet		04/04/2021 2:00 pm	Classic	✓
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/04/2021 2:00 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher site	04/04/2021 2:00 pm	Classic	✓
4	Bot Solutions	LightningBot	Discover and manage business solutions designed for your industry.	04/04/2021 2:00 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	04/04/2021 2:00 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	04/04/2021 2:00 pm	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recaps.	04/04/2021 2:00 pm	Lightning	✓
8	Digital Experiences	SalesforceDX	Manage content and media for all of your sites	04/04/2021 2:00 pm	Lightning	✓
9	Lightning Usage App	LightningUsageApp	View adoption and Usage Metrics for Lightning Experience	04/04/2021 2:00 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	04/04/2021 2:00 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	04/04/2021 2:00 pm	Classic	✓
12	Queue Management	QueueManagement	Create and manage queues for your business	04/04/2021 2:00 pm	Lightning	✓

The image displays two sequential screenshots of the Salesforce Lightning App configuration process.

Top Screenshot: App Details & Branding

This screen is titled "New Lightning App" and "App Details & Branding". It instructs the user to "Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar." The interface is divided into two main sections:

- App Details:** Contains three text input fields:
 - * App Name: Filled with "Candidate Internal Results Card".
 - * Developer Name: Placeholder text "Enter a developer name..."
 - Description: Placeholder text "Enter a description..."
- App Branding:** Contains:
 - An image upload area with an "Upload" button.
 - A "Primary Color Hex Value" field with a dropdown menu and the value "#0070C2".
 - "Org Theme Options" with a checkbox "Use the app's image and color instead of the org's custom theme" (which is unchecked).
 - An "App Launcher Preview" showing a blue button.

Navigation buttons at the bottom include "Next" (blue) and a progress bar.

Bottom Screenshot: User Profiles

This screen is also titled "New Lightning App" and "User Profiles". It instructs the user to "Choose the user profiles that can access this app." The interface is divided into two main sections:

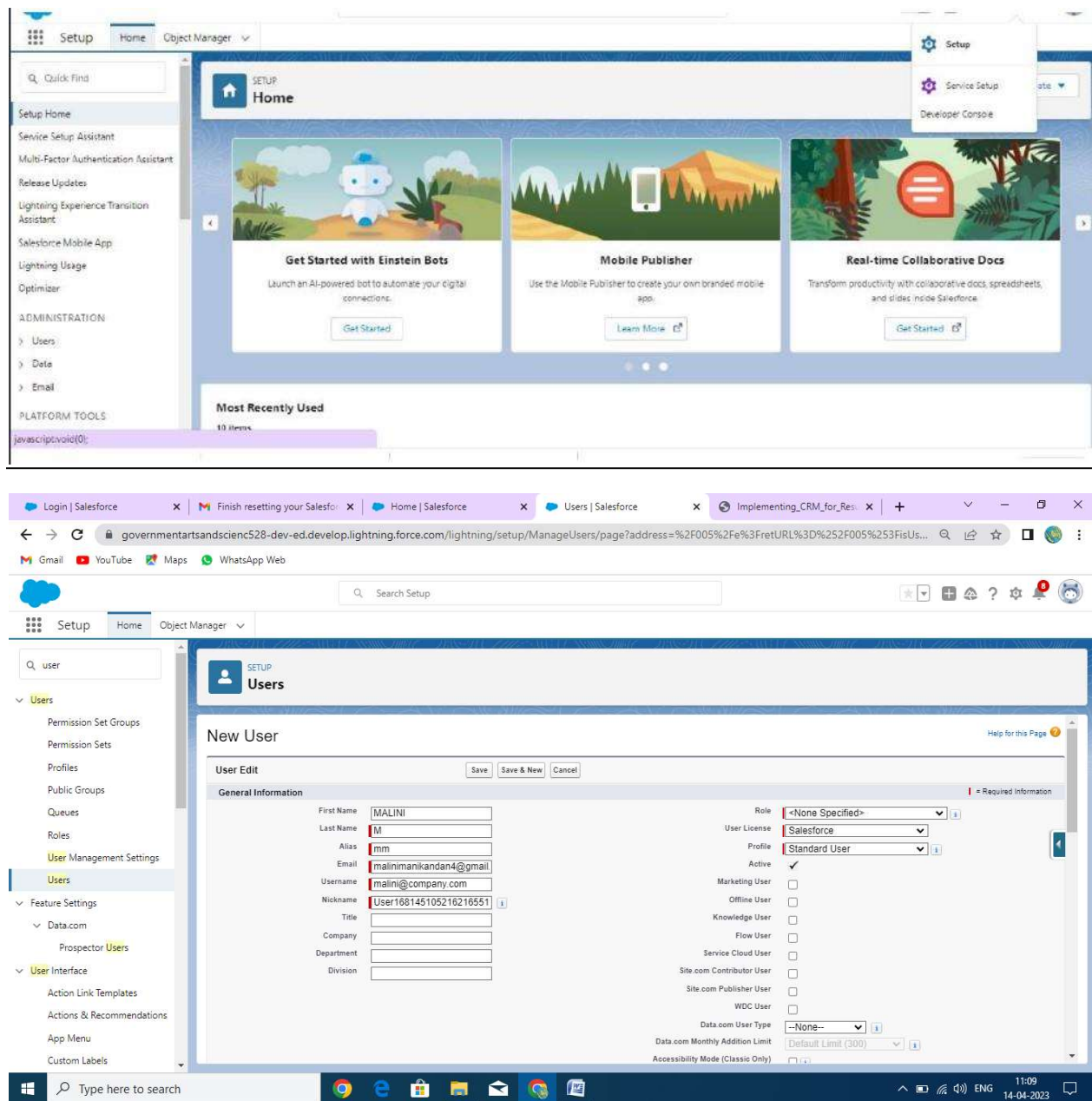
- Available Profiles:** A list box containing one item: "User Profile".
- Selected Profiles:** A large empty box with the text "No Profiles selected".

Navigation buttons at the bottom include "Back" (grey), "Save & Finish" (blue), and a progress bar.

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

Activity 1:



Milestone-5: Reports

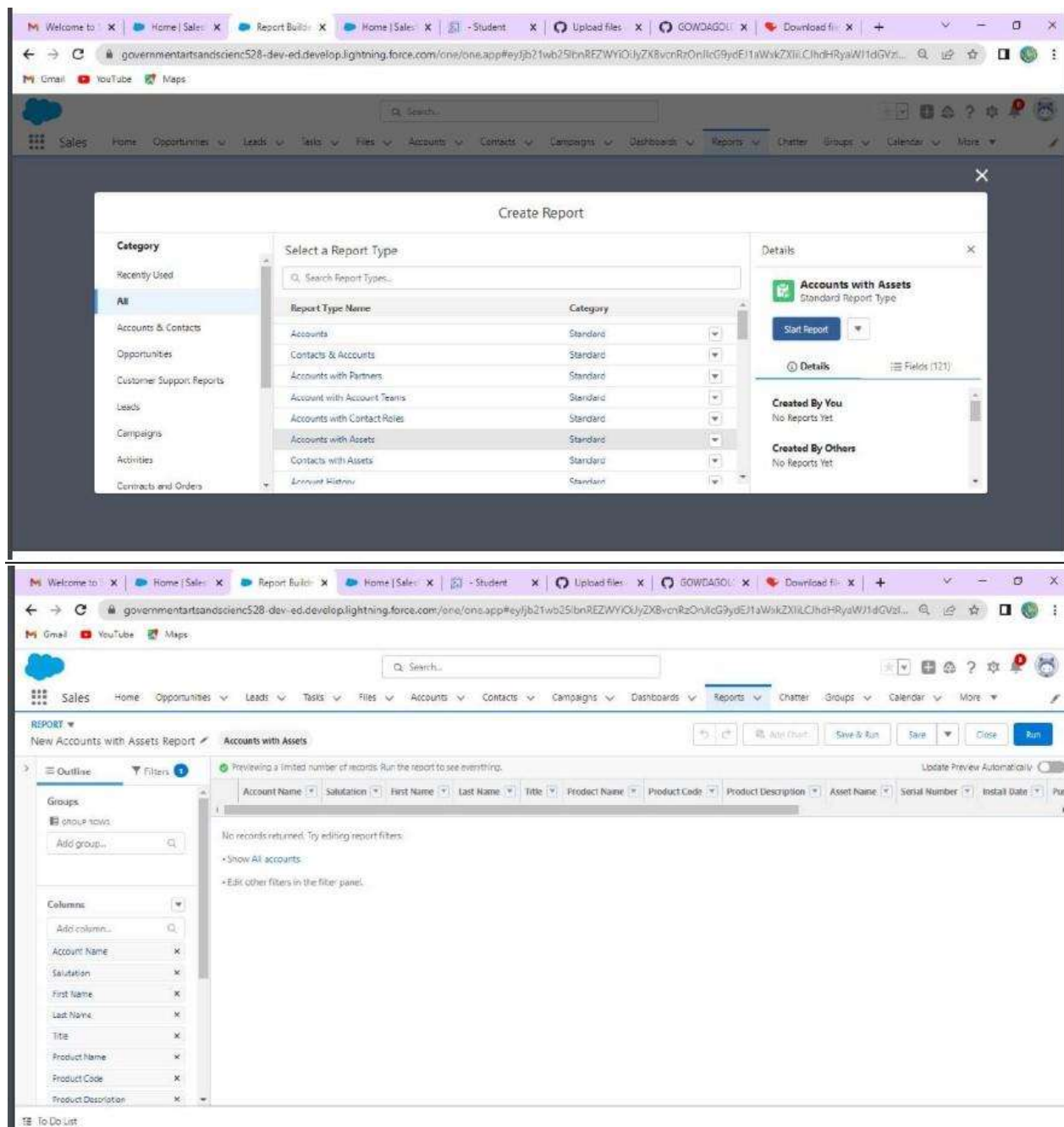
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity 1:

The image shows two screenshots of a Salesforce web interface. The top screenshot shows the main dashboard with the 'Reports' tab selected in the navigation bar. The bottom screenshot shows the 'Reports' page with the 'Recent' sub-tab selected. The page displays a 'Nothing here yet' message, indicating that no reports have been viewed yet.

Top Screenshot: The browser address bar shows the URL: `governmentartsandscienc528-dev-ed.develop.lightning.force.com/one/one.appkey/jb21wb25ibnREZWY0dyZX8lvcnRzOnp1cG9ydE/1aWskZXllCjhdHRyaW11dGVz...`. The navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The 'Reports' tab is currently selected.

Bottom Screenshot: The browser address bar shows the URL: `governmentartsandscienc528-dev-ed.develop.lightning/o/Report/home?queryScope=mr`. The navigation bar is the same as the top screenshot. The 'Reports' page is displayed, showing a 'Recent' sub-tab. The page content area is empty, displaying a 'Nothing here yet' message with a cactus illustration. The message text reads: 'Nothing here yet' and 'After you view a report, it appears here.' The left sidebar shows a list of reports and folders, including 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'All Folders', 'Created by Me', 'Shared with Me', and 'All Favorites'.



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:

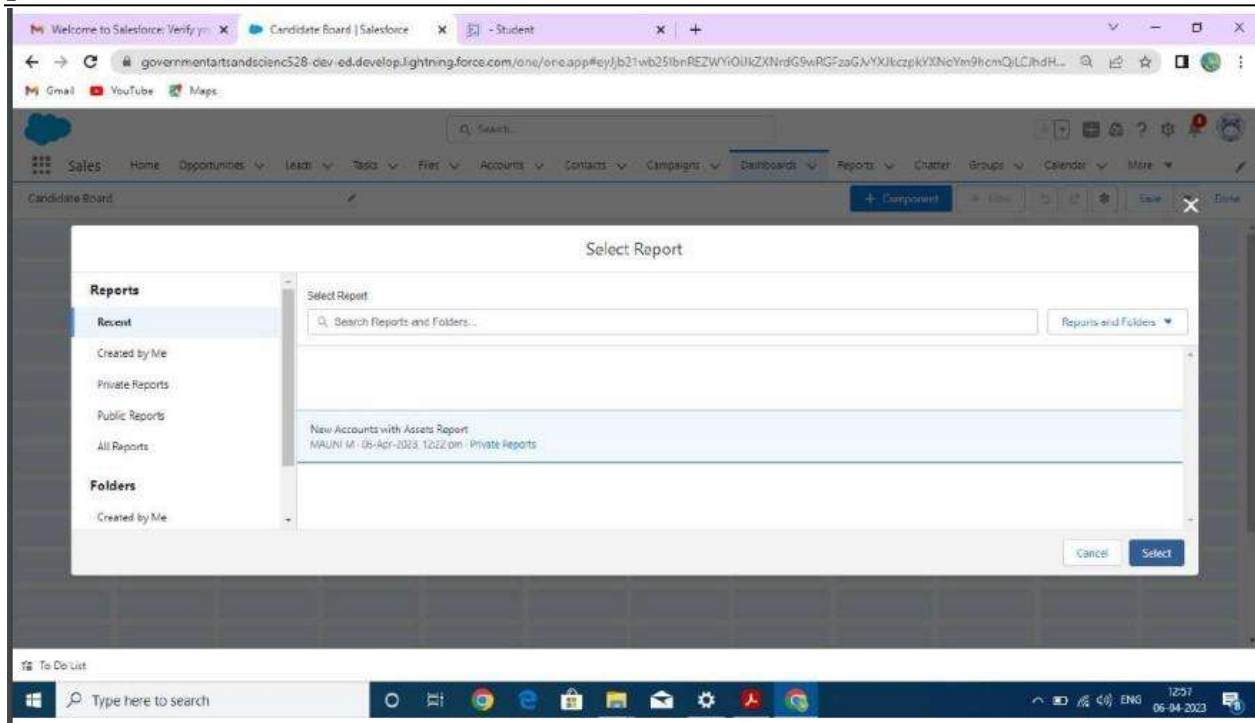
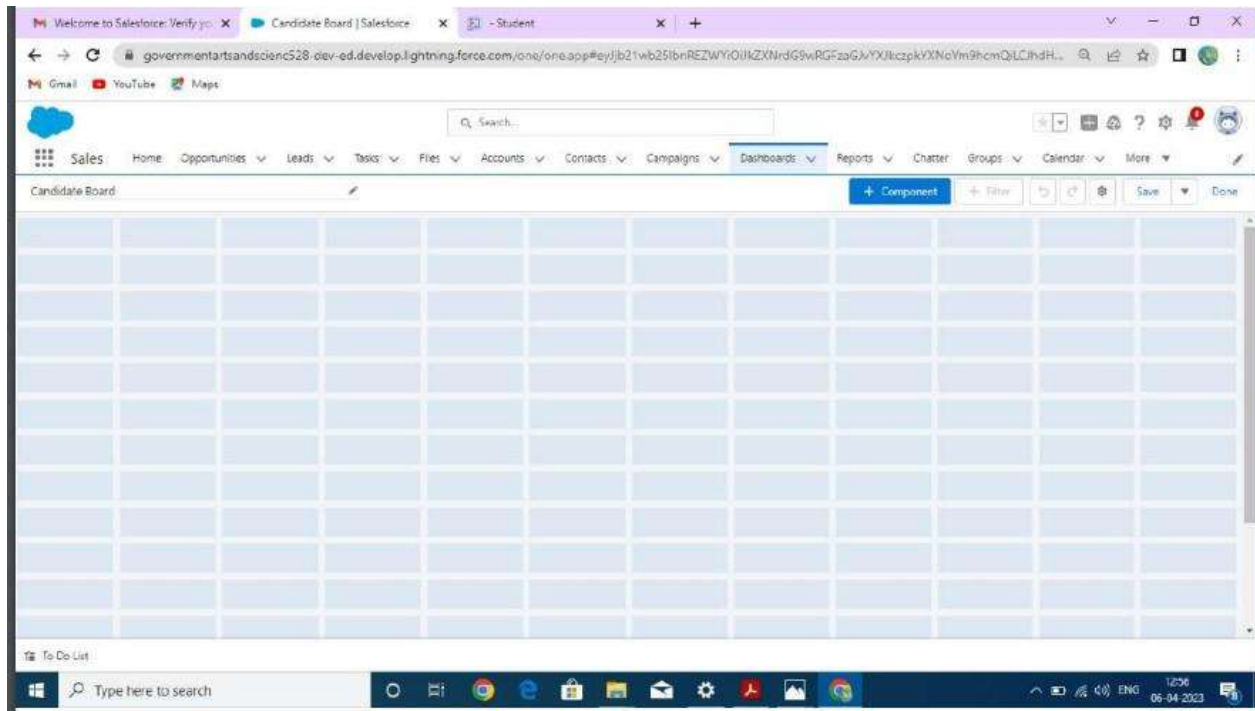
The image displays two screenshots of the Salesforce Dashboards interface, illustrating the process of creating a new dashboard.

Top Screenshot: The user is viewing the 'Recent' dashboards page. The page shows a search bar, a 'New Dashboard' button, and a 'New Folder' button. The main content area displays a message: "Nothing here yet. After you view a dashboard, it appears here." The left sidebar shows the 'Dashboards' menu with options like 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', and 'Favorites'.

Bottom Screenshot: The user is in the process of creating a new dashboard. A 'New Dashboard' dialog box is open, showing the following fields:

- Name:** Candidate Board
- Description:** (Empty field)
- Folder:** Private Dashboards (Selected from a dropdown menu)

The dialog box includes 'Cancel' and 'Create' buttons. The background shows the Salesforce interface with the 'Dashboards' menu open.



Browser tabs: Login | Salesforce, Finish resetting your Salesforce, Home | Salesforce, Candidate Board | Salesforce, Implementing CRM for Res...

Address bar: governmentartsandscienc528-dev-ed.develop.lightning.force.com/one/one.app#eyJb21wb25lbnREZWYiOiJkZXNrdG9wRGFzaGJvYXJkczpkYXNoYm9hcmQlLCJhdH...

Navigation bar: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Candidate Board

+ Component + Filter Save Done

New Accounts Report

Last ...	Accou...	Account Name	Billing State...	Type
- MALINI M	sForce	CA	-	
- MALINI M	United Oil & Gas Corp.	NY	Customer - C	
- MALINI M	University of Arizona	AZ	Customer - C	
- MALINI M	Express Logistics and Transport	OR	Customer - C	
- MALINI	Grand Hotels & Resorts Ltd	IL	Customer - C	

View Report (New Accounts Report)

Windows taskbar: Type here to search, 11:13 14-04-2023

Browser tabs: Login | Salesforce, Finish resetting your Salesforce, Home | Salesforce, Candidate Board | Salesforce, Implementing CRM for Res...

Address bar: governmentartsandscienc528-dev-ed.develop.lightning.force.com/one/one.app#eyJb21wb25lbnREZWYiOiJkZXNrdG9wRGFzaGJvYXJkczpkYXNoYm9hcmQlLCJhdH...

Navigation bar: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Candidate Board

+ Component + Filter Save Done

Add Component

Report: New Accounts Report

☐ Use chart settings from report

Display As

Groups: Add group...

Preview

New Accounts Report

Last...	Ac...	Account Name	Billing St...	Type
- MALINI	sForce	CA	-	
- MALINI	United Oil & Gas Corp.	NY	Customer -	
- MALINI	University of Arizona	AZ	Customer -	
- MALINI	Express Logistics and	OR	Customer -	

View Report (New Accounts Report)

Cancel Add

Dashboard
Candidate Board
As of 14-Apr-2023, 11:19 am Viewing as MALINI M

Refresh Edit Subscribe

New Accounts Report

Last A...	Accou...	Account Name	Billing State/...	Type
- MALINI M	-	sForce	CA	-
- MALINI M	-	United Oil & Gas Corp.	NY	Customer - D
- MALINI M	-	University of Arizona	AZ	Customer - D
- MALINI M	-	Express Logistics and Transport	OR	Customer - C
- MALINI	-	Grand Hotels & Resorts Ltd	IL	Customer - D

View Report (New Accounts Report)

To Do List

Type here to search

11:13
14-04-2023

Trailhead Profile Public URL:

Team Lead – <https://trailblazer.me/id/mmanikandan20>

Team Member 1 – <https://trailblazer.me/id/kkaviyaelumalai>

Team Member 2 – <https://trailblazer.me/id/karpa34>

Team Member 3 – <https://trailblazer.me/id/ssagi40>

ADVANTAGES:

- Better customer service.
- Increased sales.
- Improved customer retention.
- Detailed analytics.
- Higher productivity and efficiency.
- Centralized database of information.
- Managed communications with prospective leads.

- Improved customer segmentation.

DISADVANTAGE:

- Software subscription or purchase fees.
- Premium upgrades, eg add-on marketing or reporting features.
- Customisation.
- IT resources needed.
- Hardware or software requirements.
- Staff training and up skilling.

APPLICATIONS:

- Tracking Customers
- Collecting Data for Marketing
- Improving Interactions and Communications
- Streamlining Internal Sales Processes
- Planning Your Operations.

CONCLUSION:

Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BMW has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sale of its product.

Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has greatly diversified its customer roots to various market bases. Mercedes has majored in a customer-dealership business relationship. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the company's profitability through an increased purchase command. The

two companies are among the leading CRM implementers in the automotive industries and established to outdo other manufacturing companies due to their high-profile customer base.

From the discussion, you can realize, CRM in the automotive industry is strategically used as a model mechanism for brand promotion and customer attraction. The technology comes with imperative customer analysis measures using technological systems for business organization, automation, and synchronization of the business sales, customer services, marketing, and technical support. CRM has been used to promote local and internal customer interaction elevating the marketing initiative. Through CRM information, BMW has been able to identify the target customer base and competitive marketing strategies for customer strengthening and retention.

FUTURE SCOPE:

Understanding the CRM scope you hope to achieve is crucial to the success of your CRM implementation. “Scope” refers to how far-reaching the CRM will be within your organization. For example, if only your customer service reps will be using it, the scope of your CRM would be considered narrow. If your marketing teams, sales reps, customer care team, data analysts and project managers will all be utilizing the system, that is a broad scope of CRM.

To begin the scoping process, reflect on what you’re hoping to improve by utilizing a CRM system — this should help narrow your focus and help you understand what kind of scope you need. To keep expectations realistic, make a list of questions for yourself and for the vendors of your shortlist platforms. Consider things like budget, time-frame, how much training you think you’ll want (or, more likely, how much you’re willing to pay for). By asking these targeted questions to the project managers and stakeholders, you can move forward confidently with parameters that have been discussed with all the necessary people on board.