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

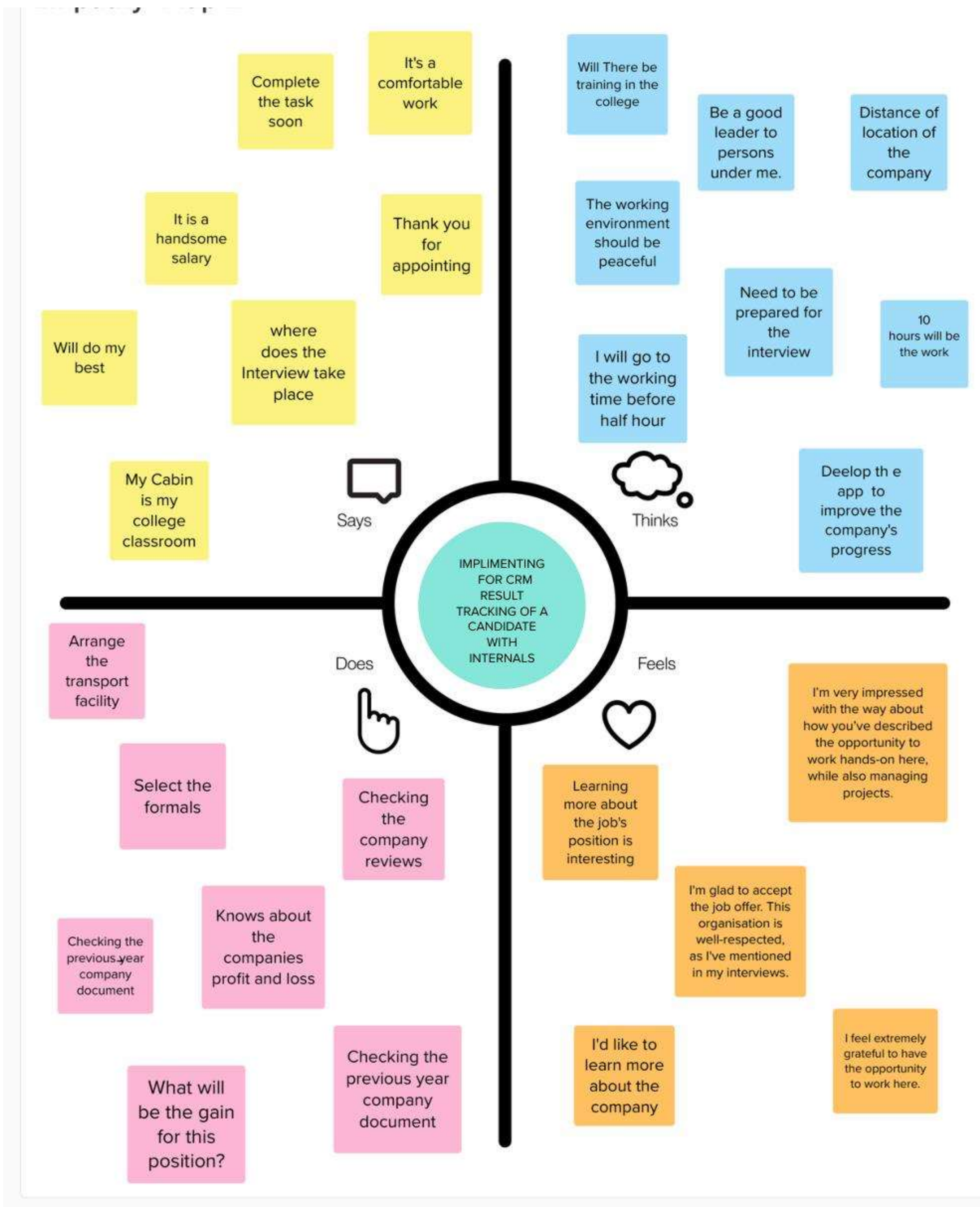
1.2 Purpose

CRM purpose and its importance

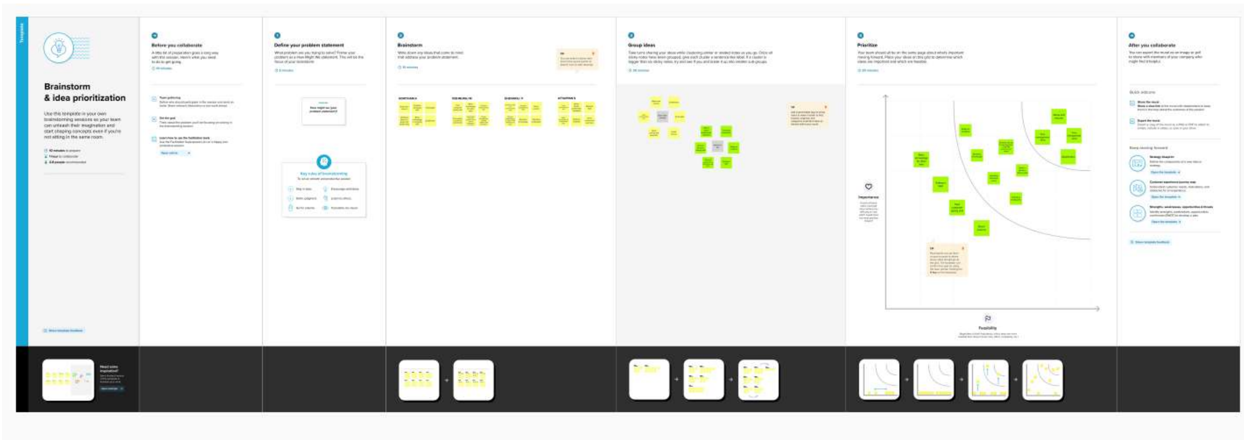
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve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

Problem Definition & Design Thinking:

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



RESULT

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

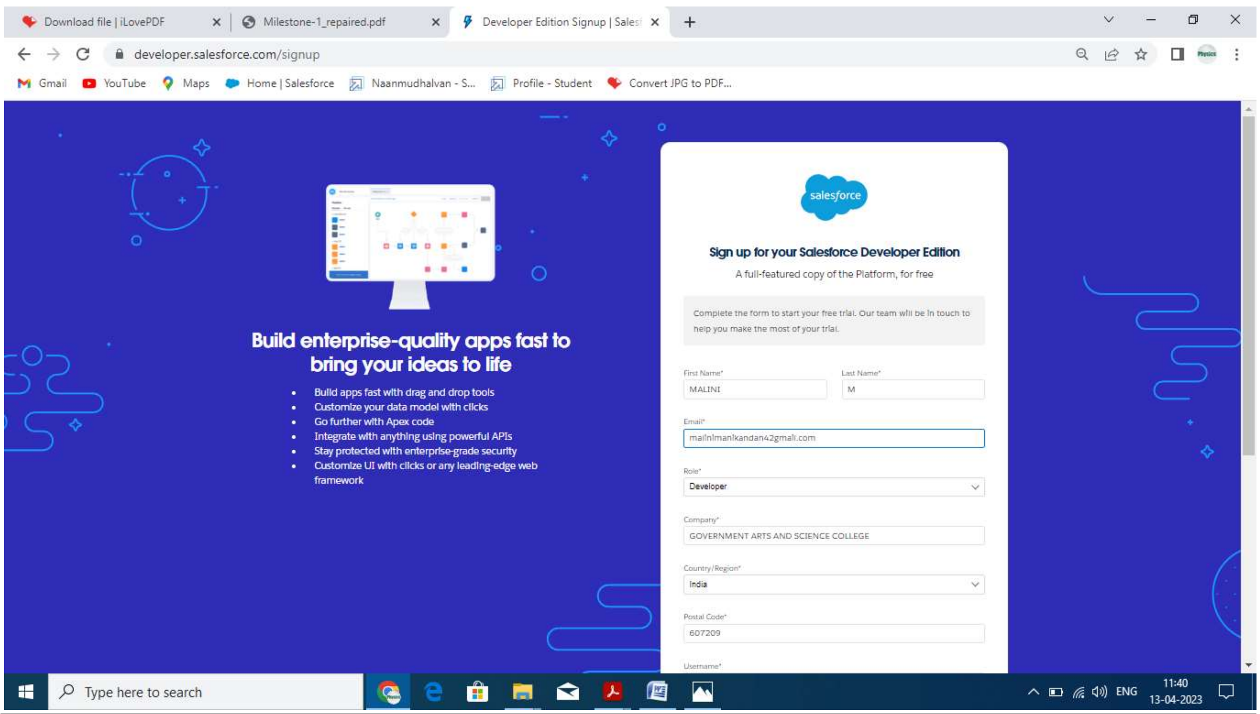
3.2 Activity & Screenshot

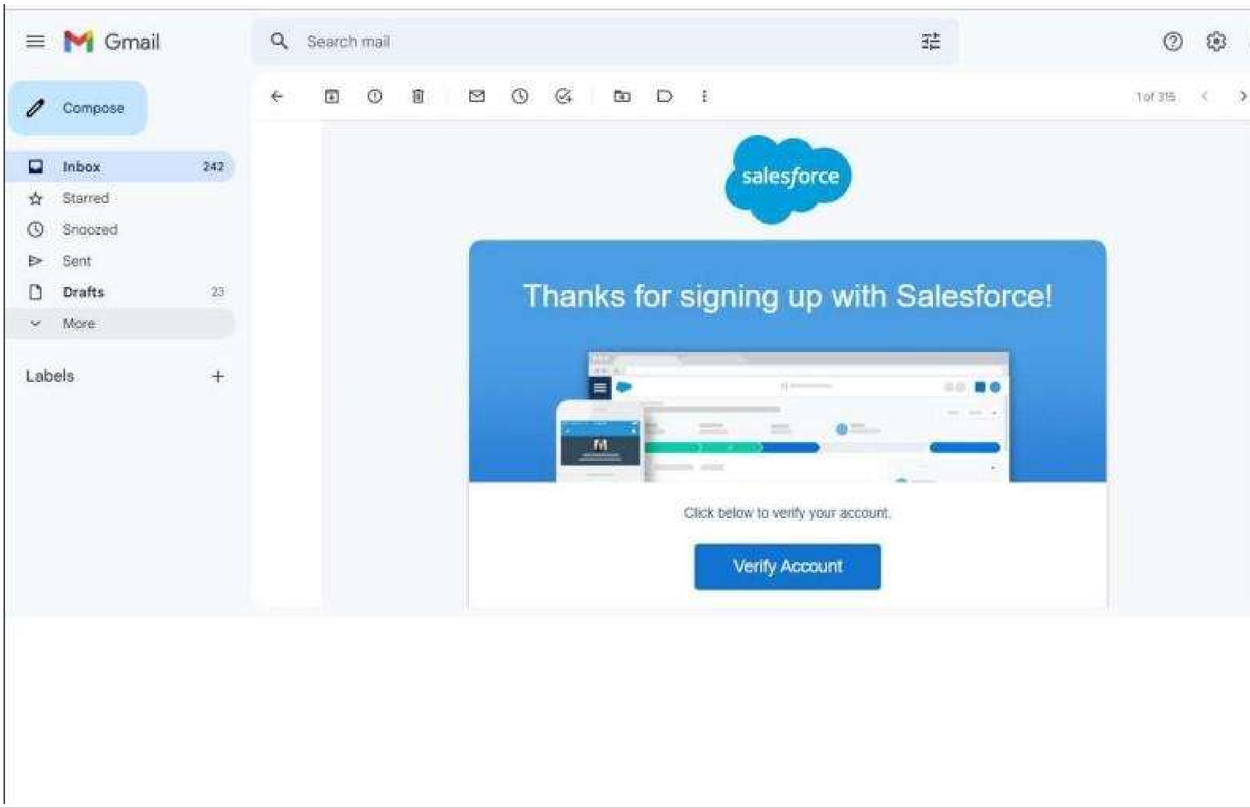
Milestone 1:Creation Salesforce Org:

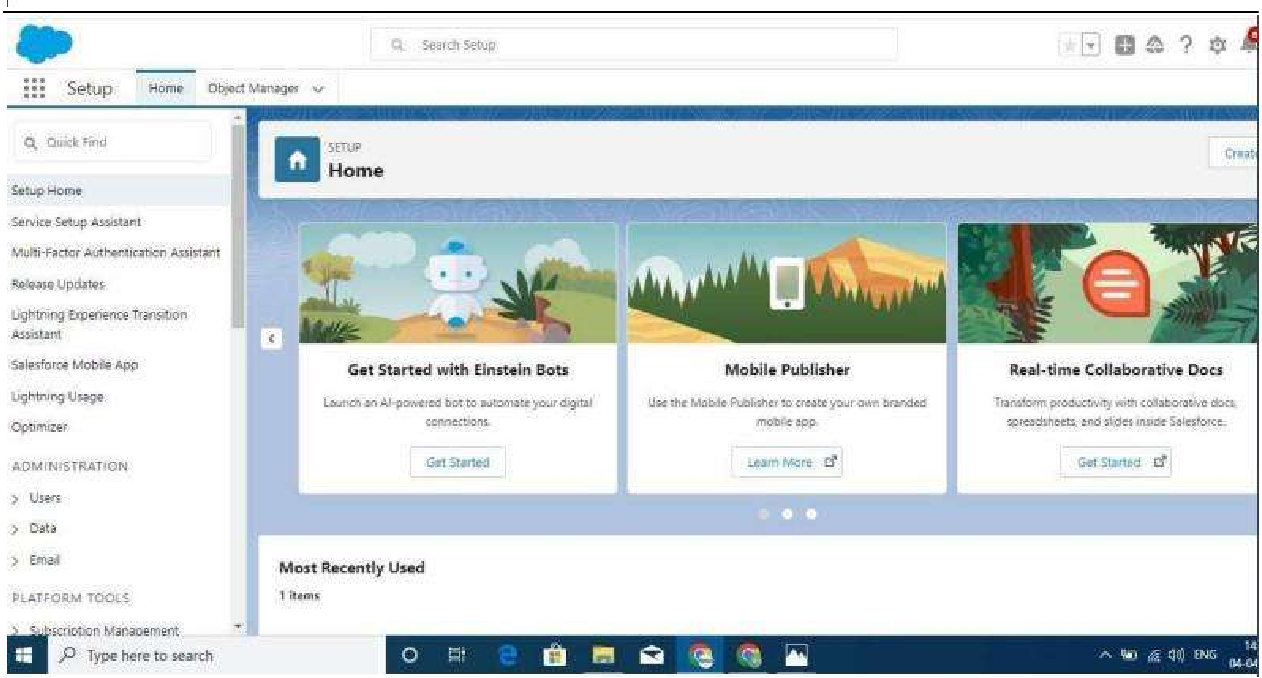
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

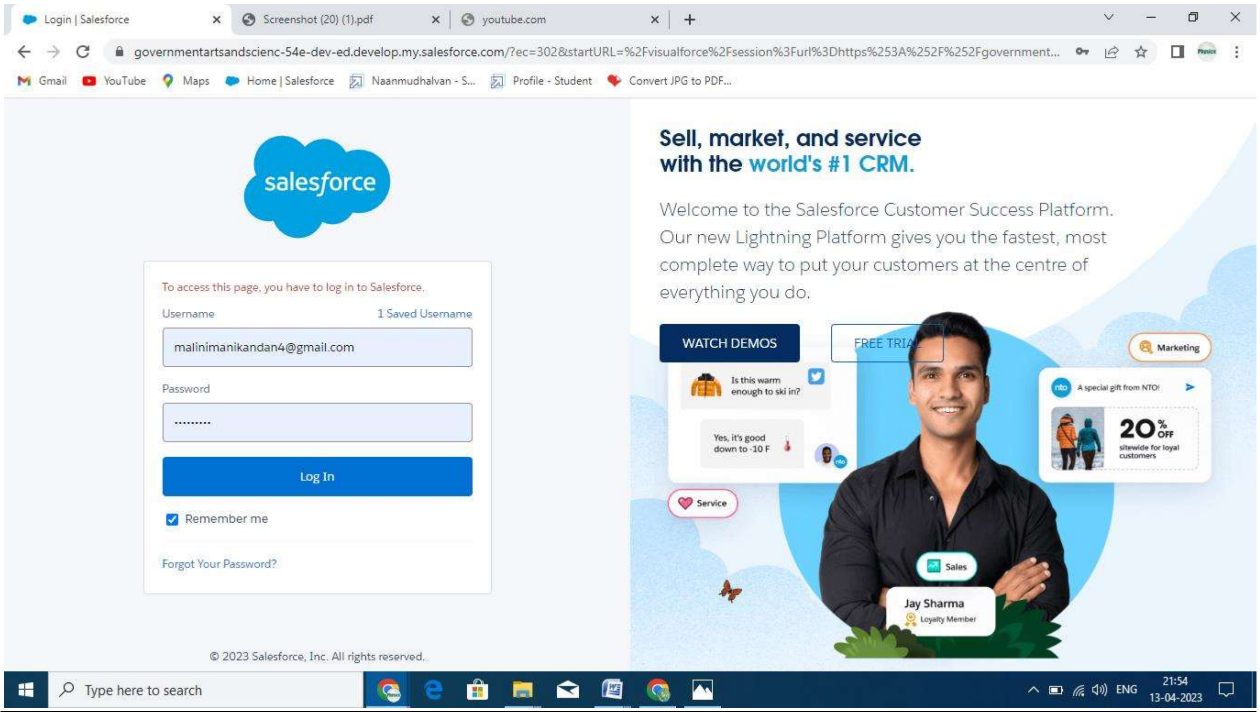
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Activity 1:




Gmail
Search mail
Compose
Inbox 242
Starred
Snoozed
Sent
Drafts 23
More
Labels
salesforce
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account

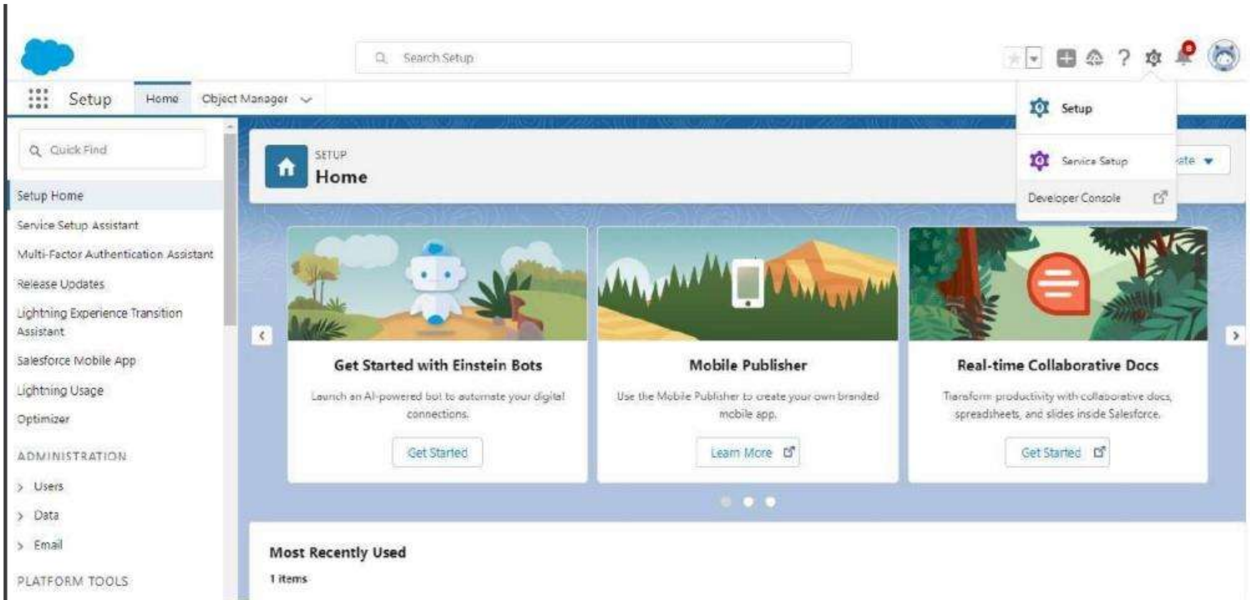

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Home
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
1 items
Type here to search
ENG

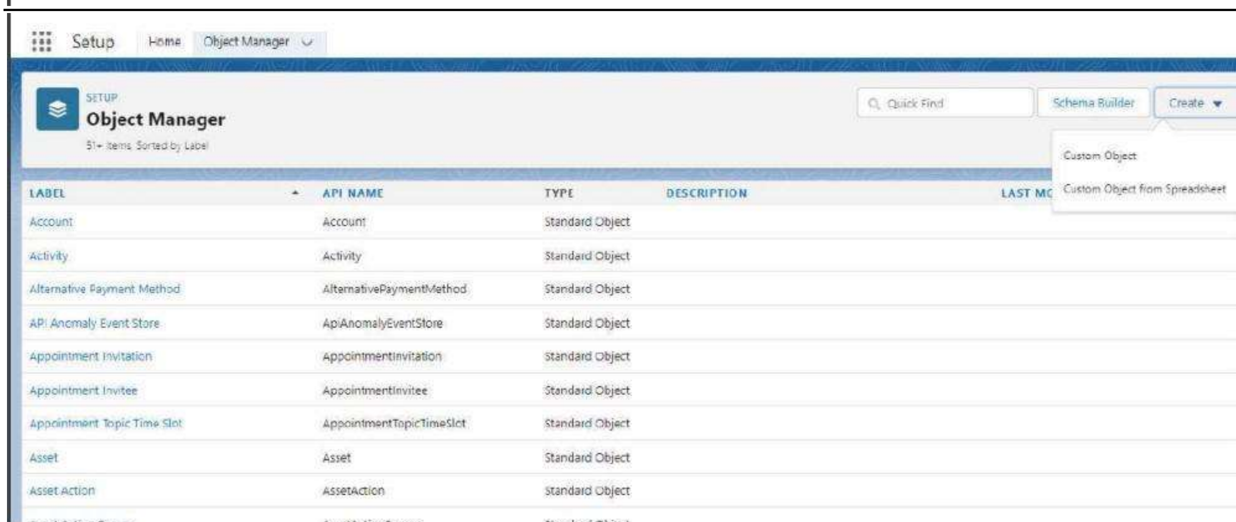


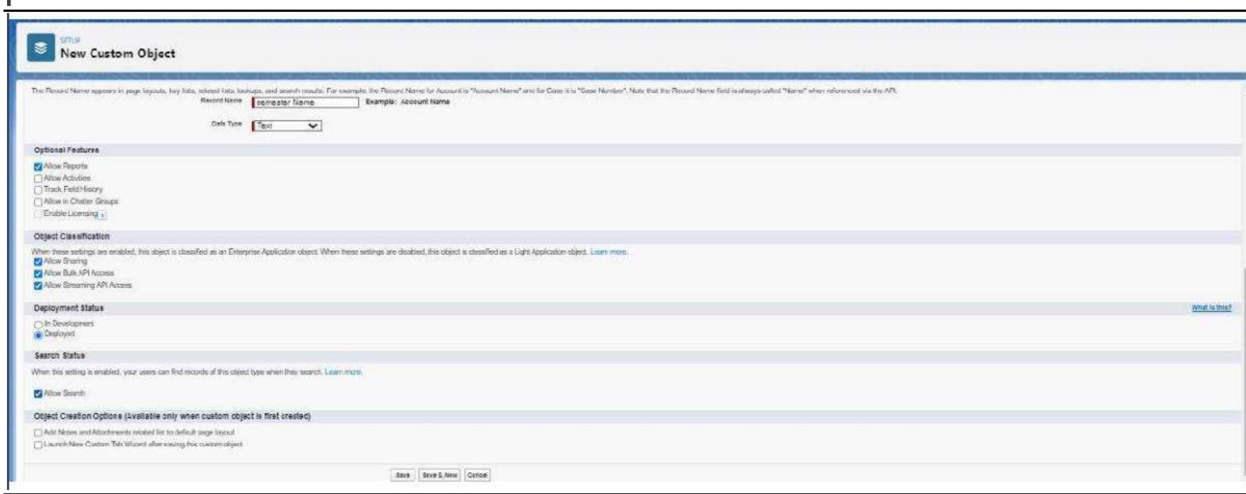
Milestone-2: Object

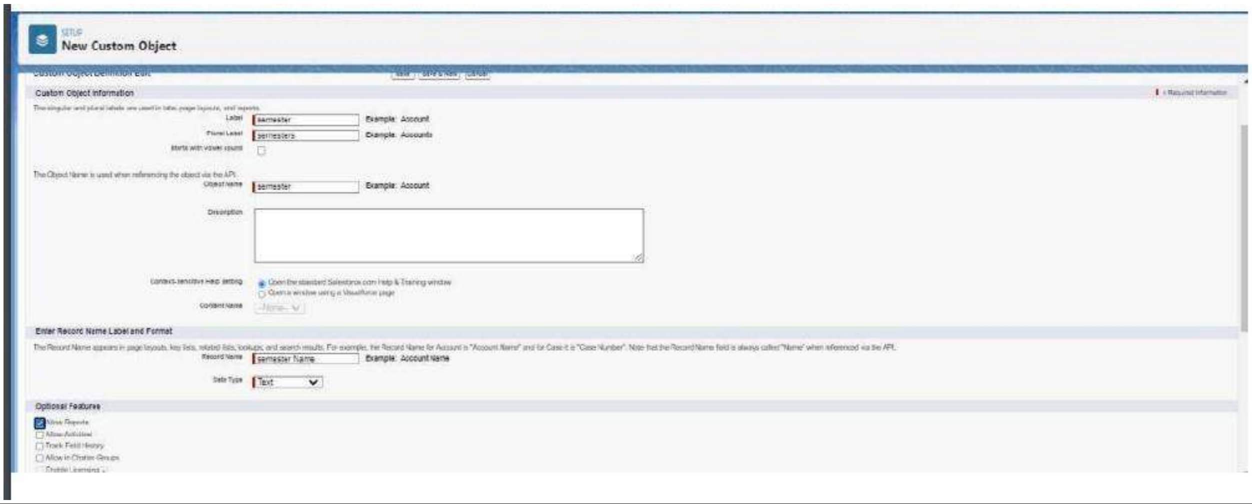
Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

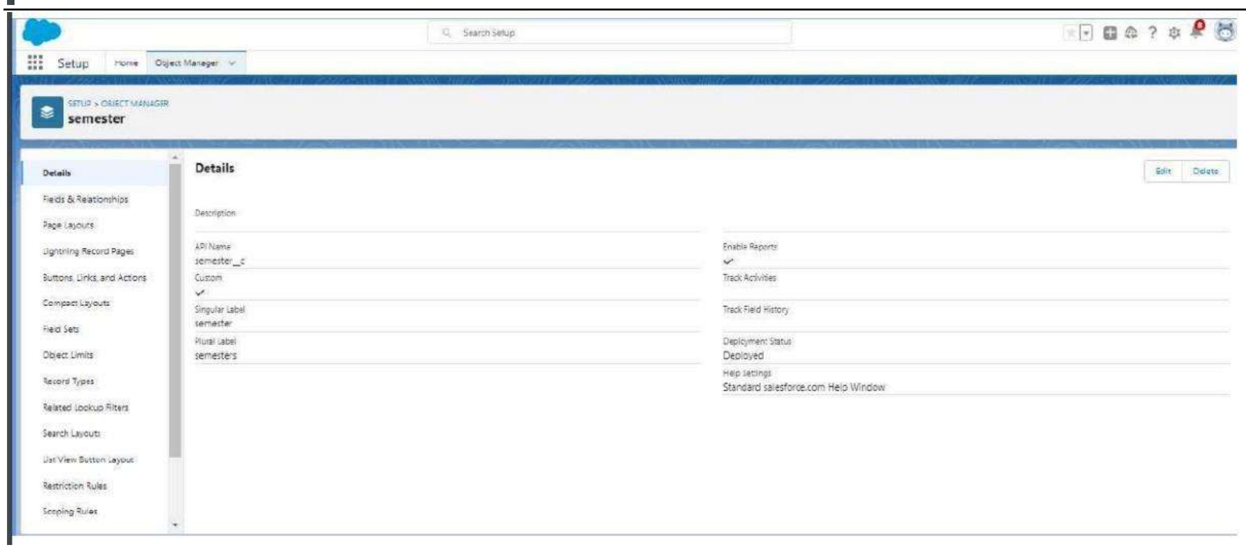
Activity-1:


Search Setup
Setup
Home
Object Manager
Setup
Service Setup
Developer Console
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
SETUP
Home
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
1 items

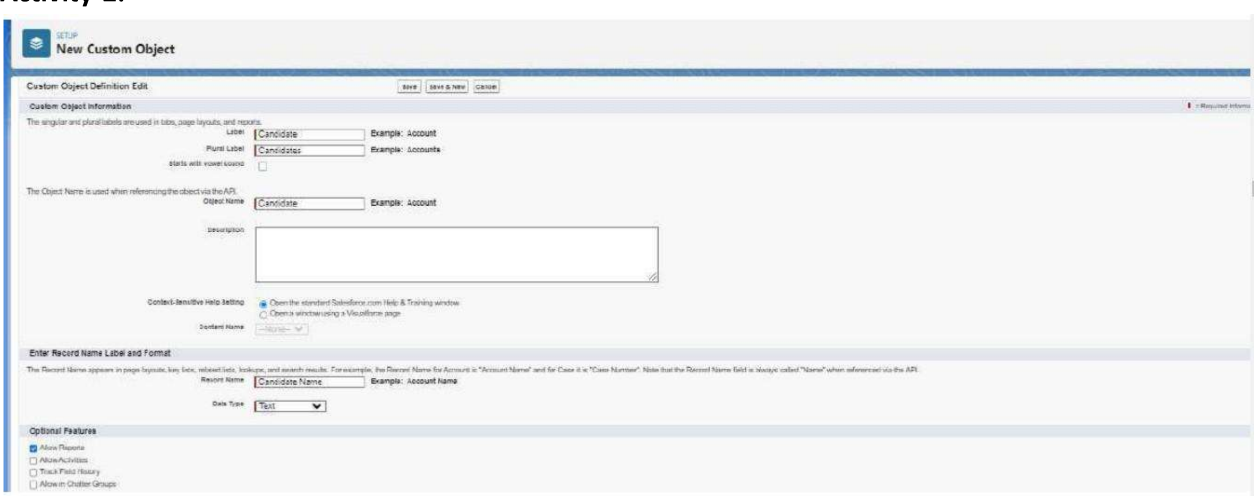

Setup
Home
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
Custom Object
Custom Object from Spreadsheet
LABEL
API NAME
TYPE
DESCRIPTION
Account
Account
Standard Object
Activity
Activity
Standard Object
Alternative Payment Method
AlternativePaymentMethod
Standard Object
API Anomaly Event Store
ApiAnomalyEventStore
Standard Object
Appointment Invitation
AppointmentInvitation
Standard Object
Appointment Invitee
AppointmentInvitee
Standard Object
Appointment Topic Time Slot
AppointmentTopicTimeSlot
Standard Object
Asset
Asset
Standard Object
Asset Action
AssetAction
Standard Object

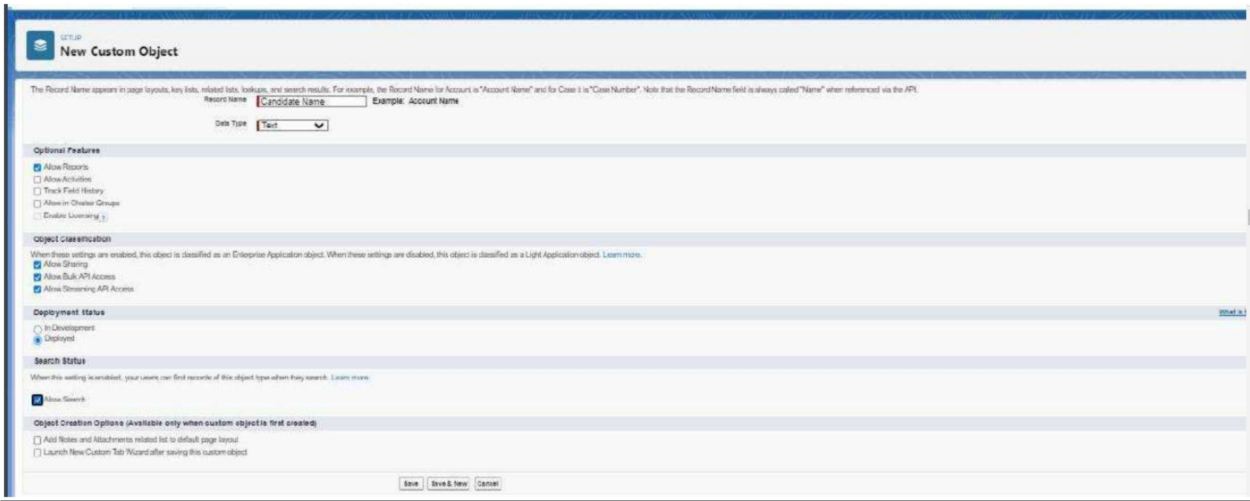

New Custom Object
Optional Features
Object Classification
Deployment Status
Search Status
Object Creation Options (Available only when custom object is first created)

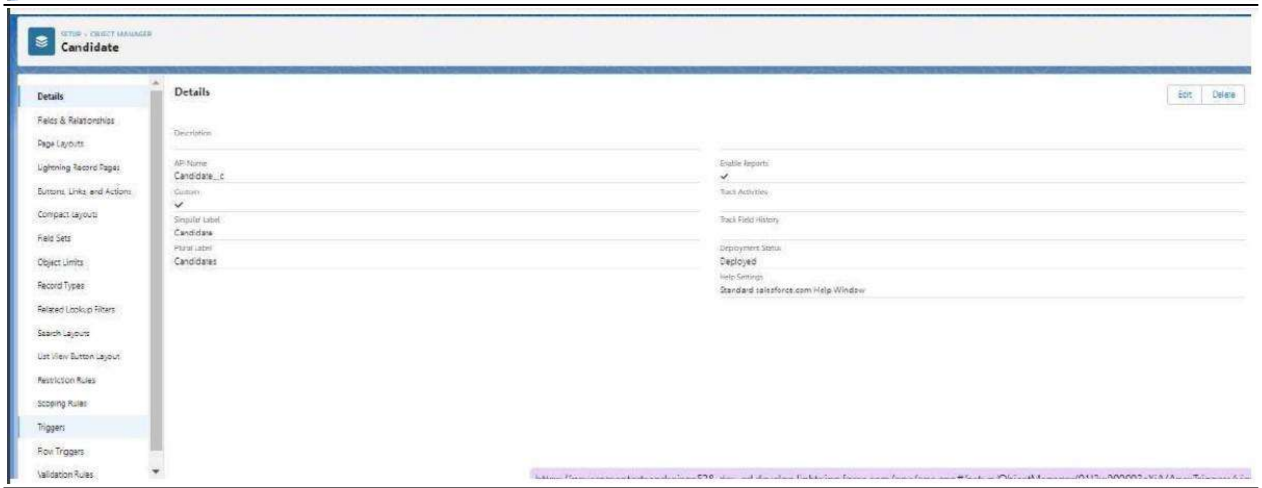

SETUP
New Custom Object
Custom Object Information
Label semester Example: Account
Plural Label semesters Example: Accounts
Object Name semester Example: Account
Description
Enter Record Name Label and Format
Record Name semester Name Example: Account Name
Data Type Text
Optional Features

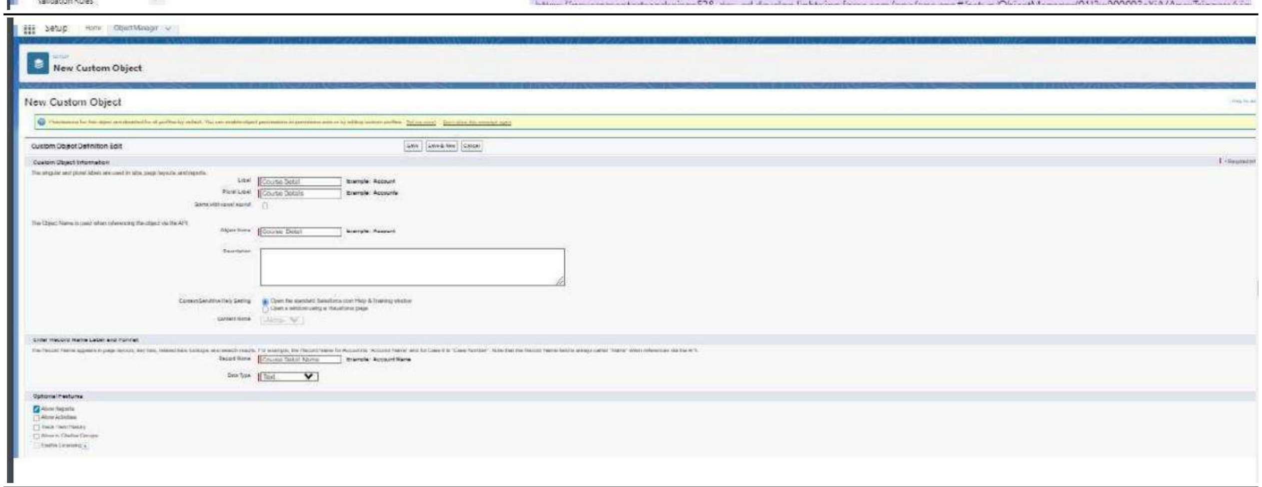

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
semester
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Details
Edit
Delete
Description
API Name
semester__c
Custom
Singular Label
semester
Plural Label
semesters
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

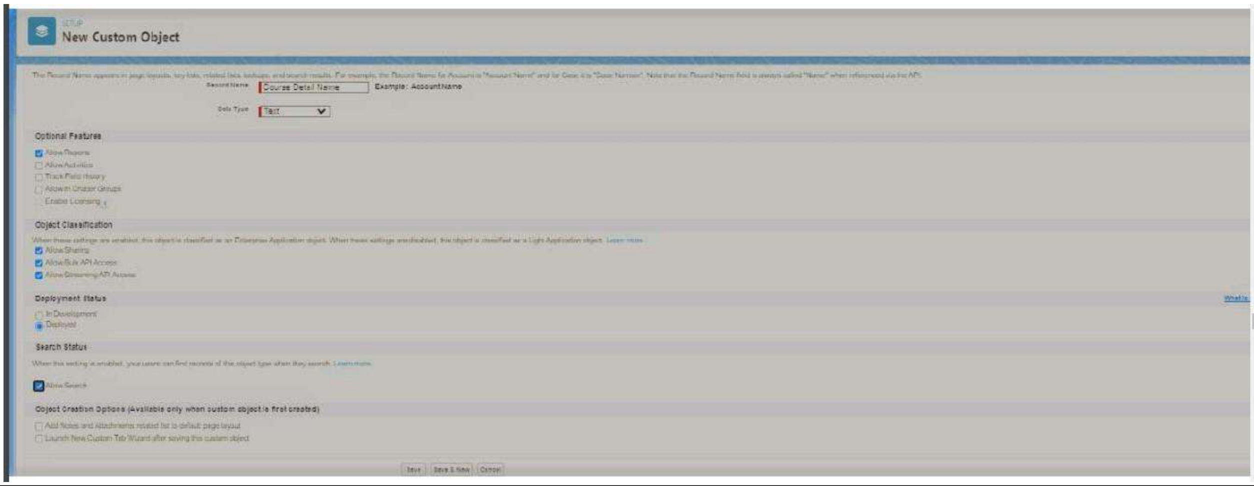
Activity-2:

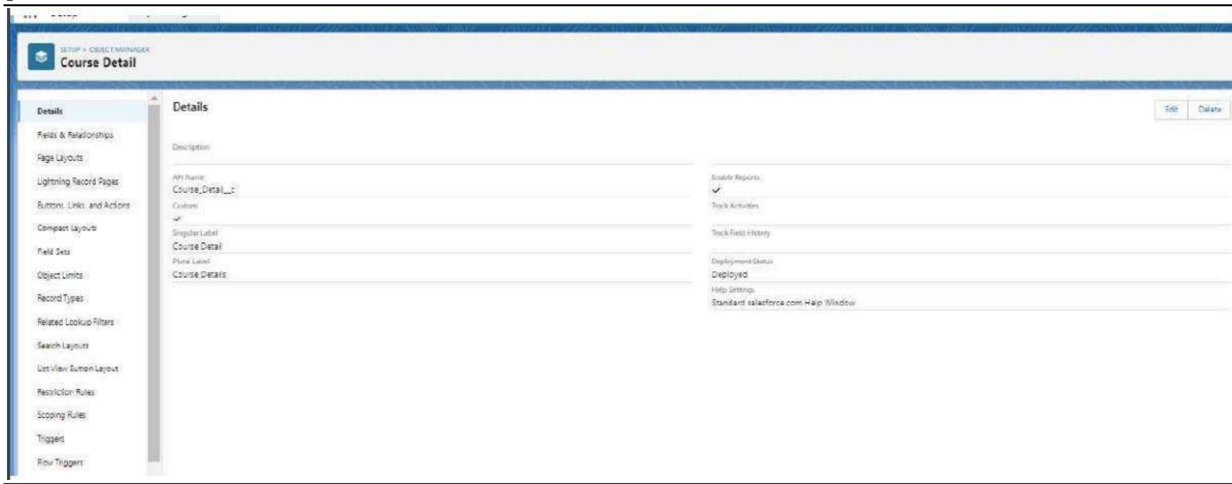

SETUP
New Custom Object
Custom Object Definition Edit
Custom Object Information
Label Candidate Example: Account
Plural Label Candidates Example: Accounts
Object Name Candidate Example: Account
Description
Enter Record Name Label and Format
Record Name Candidate Name Example: Account Name
Data Type Text
Optional Features

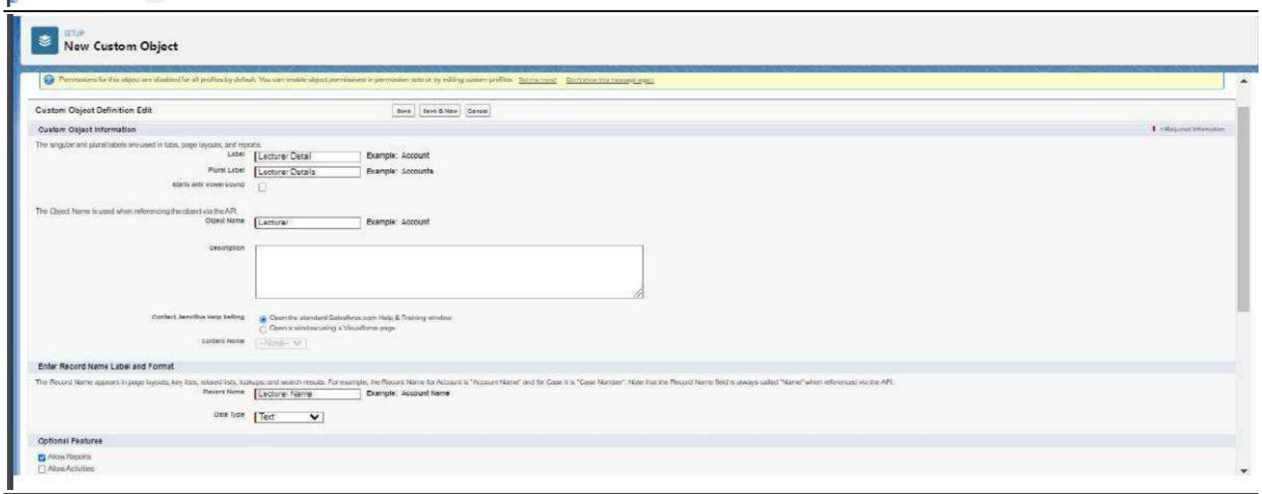

New Custom Object
Record Name Candidate Name Example: Account Name
Data Type Text
Optional Features
Allow Reports
Object Classification
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
In Development
Deployed
Search Status
Allow Search
Object Creation Options (Available 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

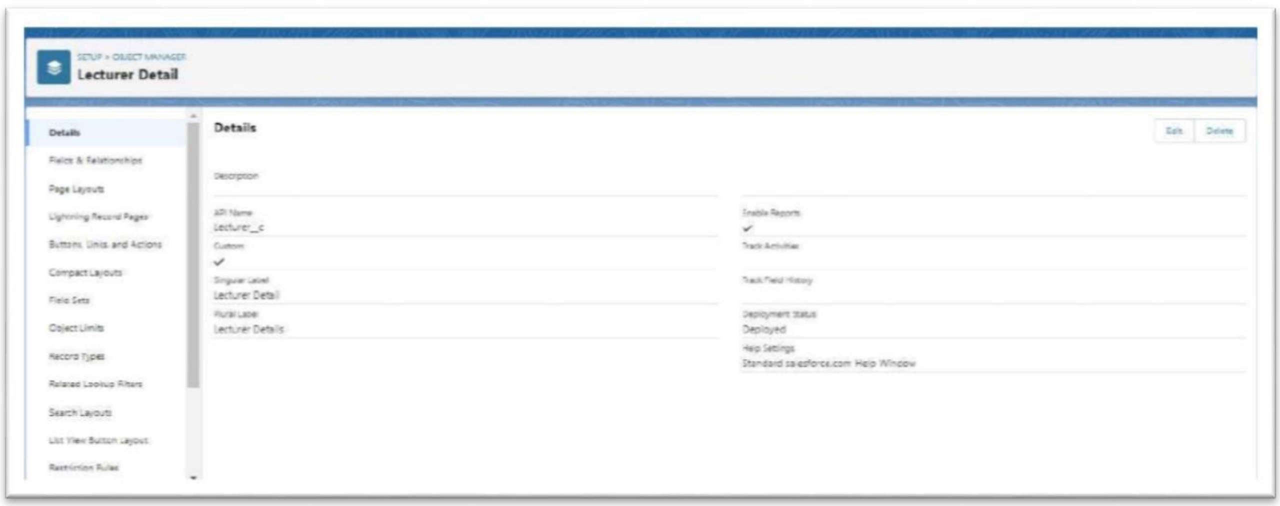

SETUP > OBJECT MANAGER
Candidate
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Details
Edit Delete
Description
API Name
Candidate__c
Custom
Singular Label
Candidate
Plural Label
Candidates
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Setup Home Object Manager
New Custom Object
New Custom Object
Custom Object Definition Edit
Save Save & New Cancel
Custom Object Information
Label Course Detail Example: Account
Plural Label Course Details Example: Accounts
Object Name Course_Detail
Description
Record Name Course Detail Name Example: Account Name
Data Type Text
Optional Features
Allow Reports


SETUP
New Custom Object
Record Name
Course Detail Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
Track Field History
Object Classification
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
In Development
Deployed
Search Status
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


SETUP > OBJECT MANAGER
Course Detail
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
Details
Edit
Delete
Description
API Name
Course_Detail__c
Custom
Singular Label
Course Detail
Plural Label
Course Details
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

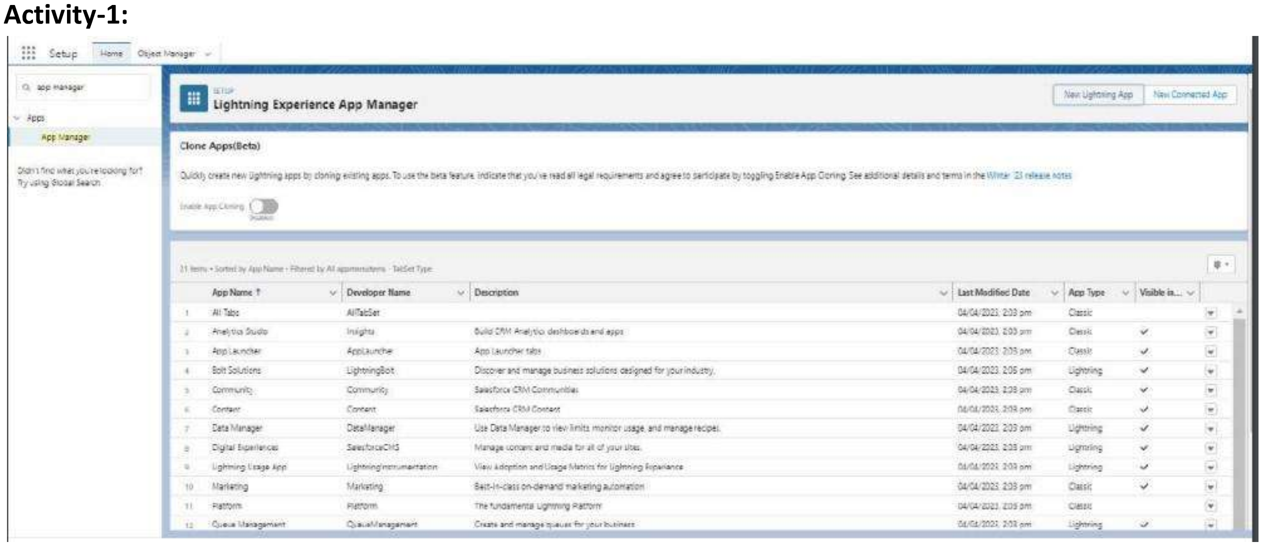

SETUP
New Custom Object
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Lecturer Detail
Example: Account
Plural Label
Lecturer Details
Example: Accounts
The Object Name is used when referencing the object via the API.
Object Name
Lecturer
Example: Account
Description
Context-Sensitive Help Setting
Enter Record Name Label and Format
Record Name
Lecturer Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities

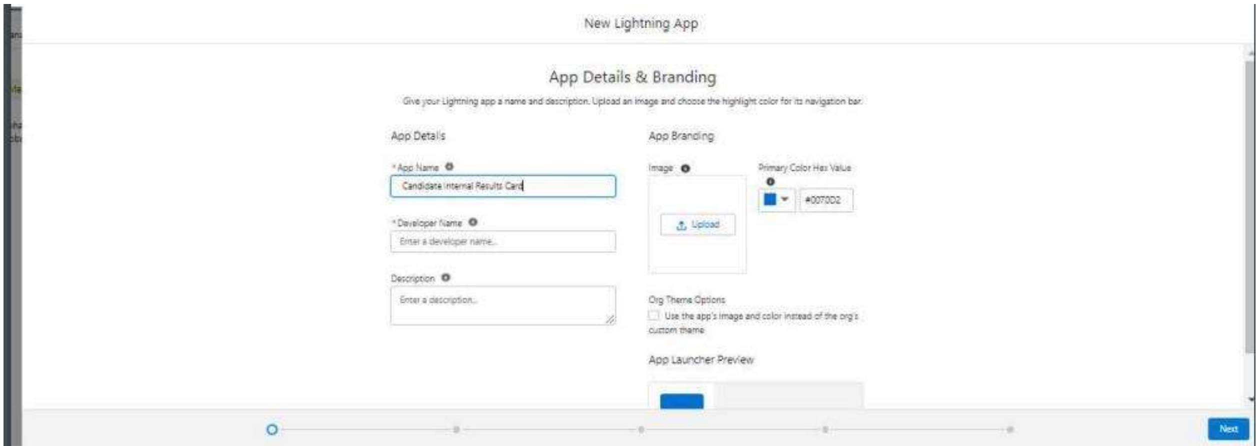


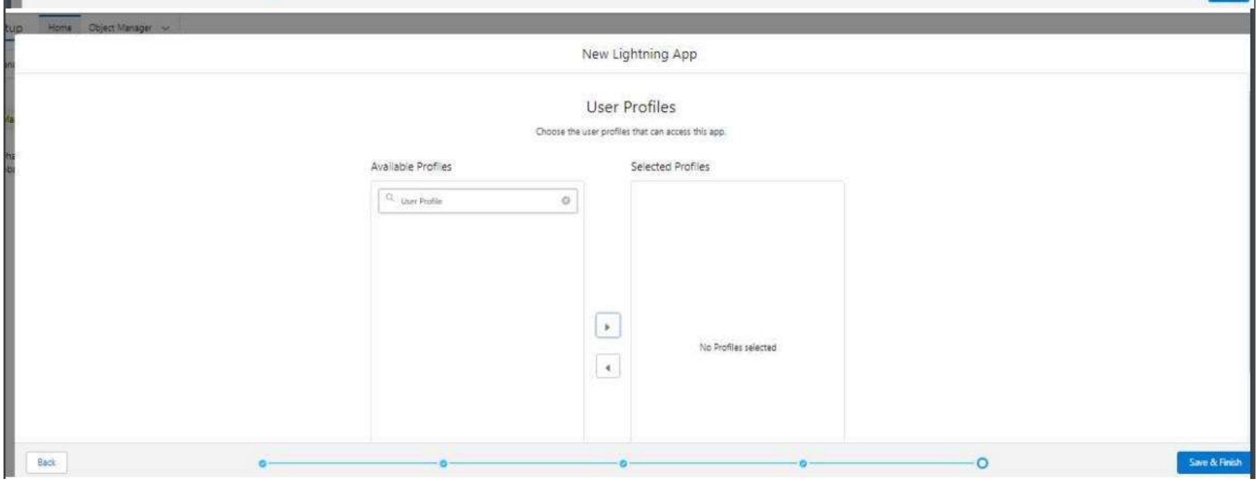
Milestone-3: Lightning App:

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:



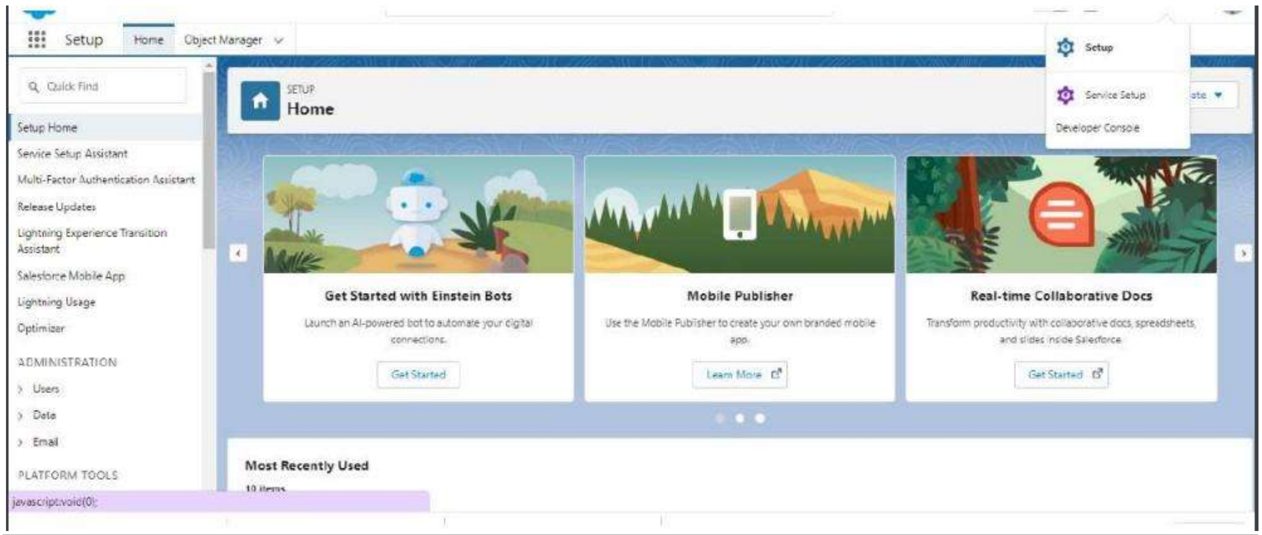


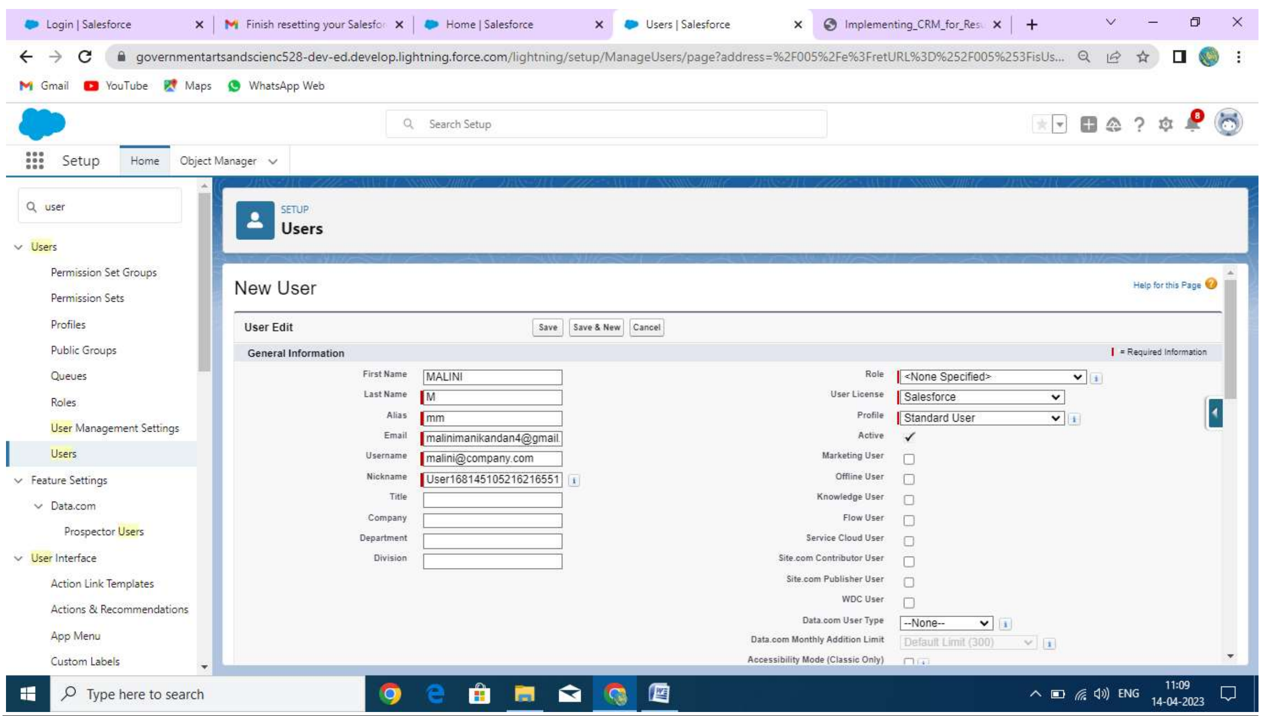


<u>Milestone-4: Users:</u>

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:

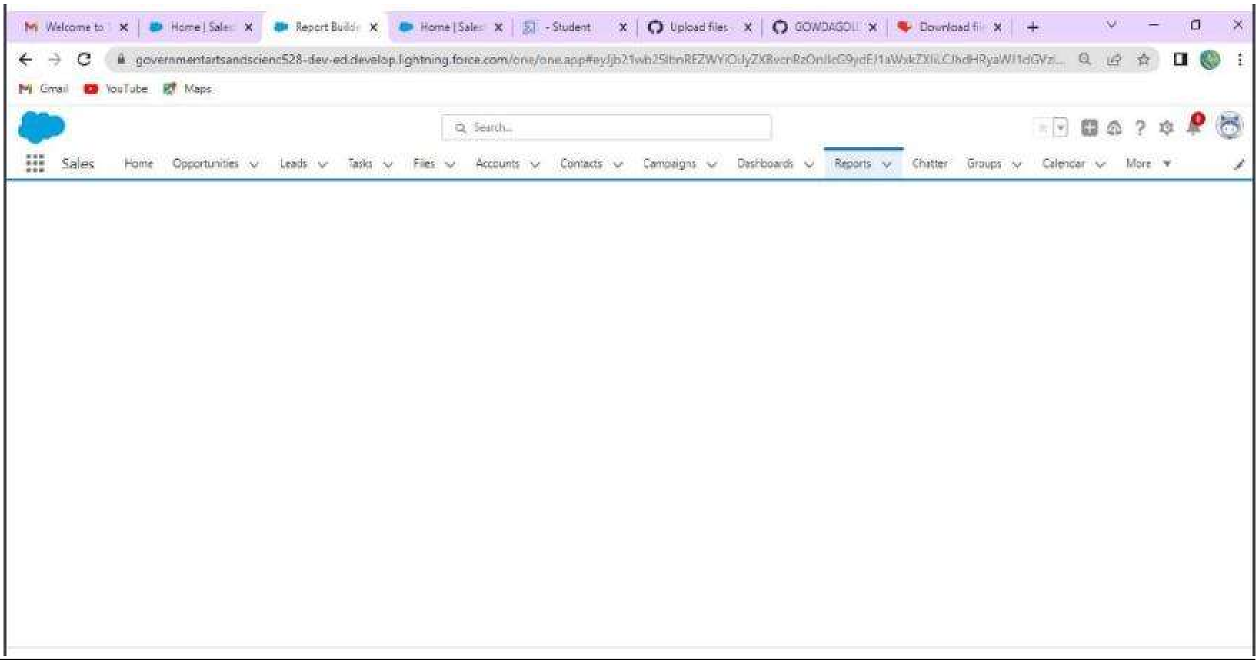


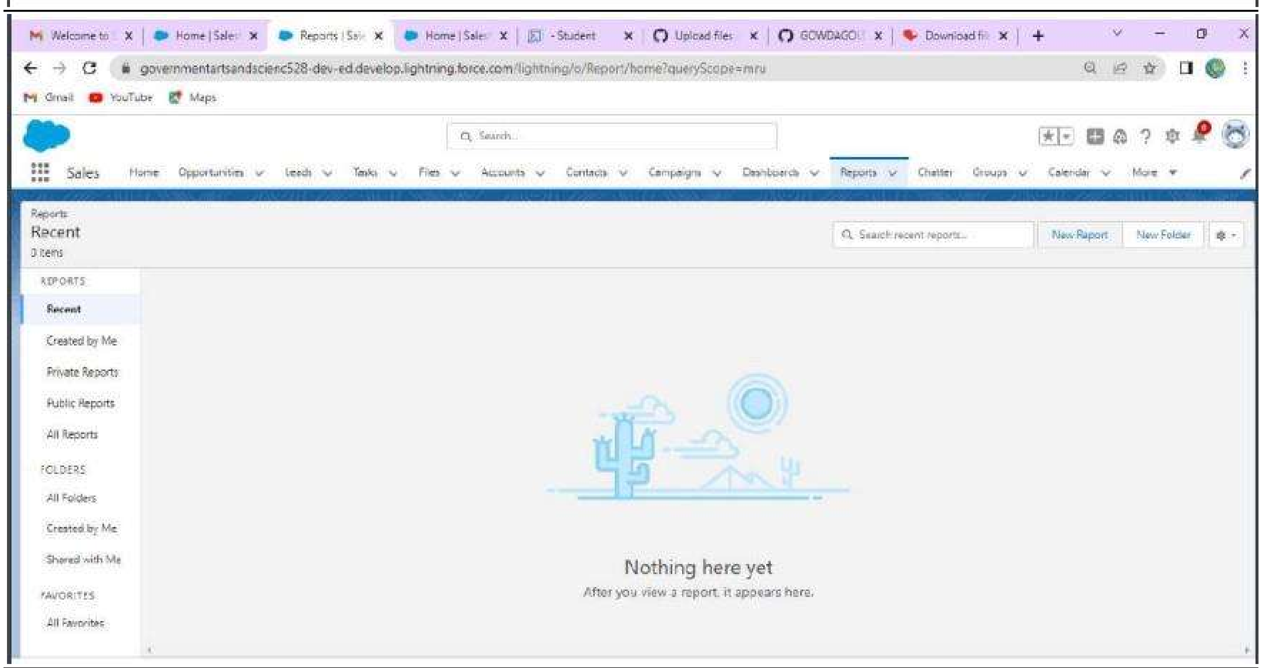


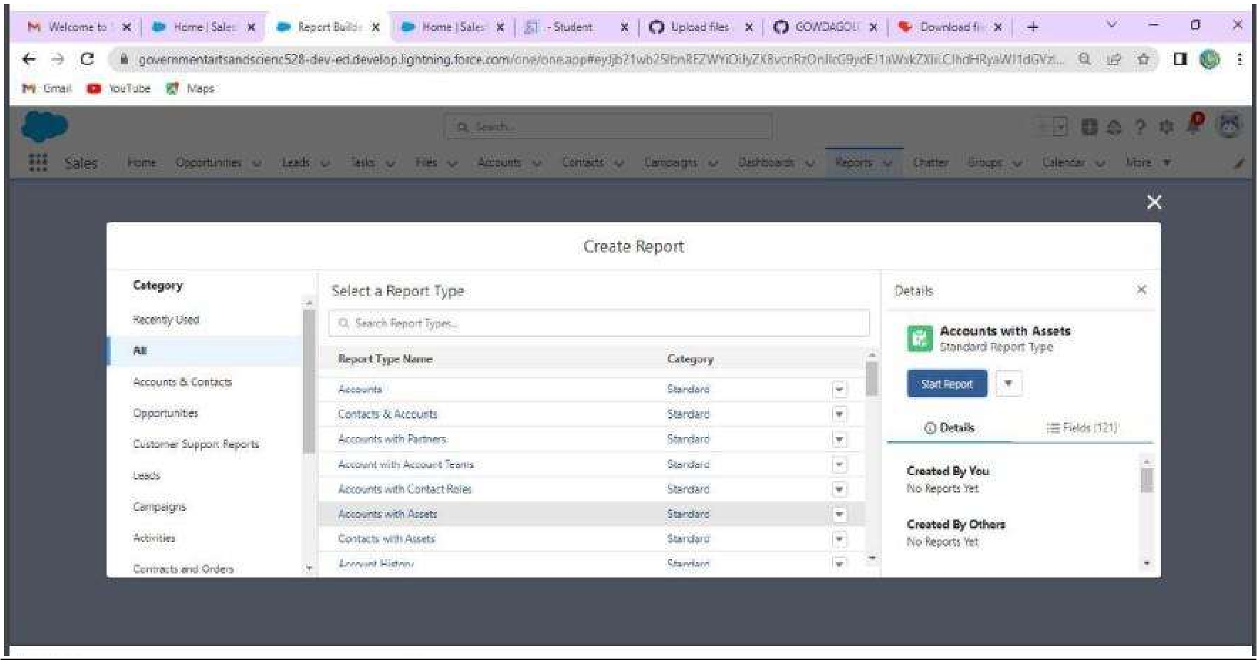
Milestone-5: Reports

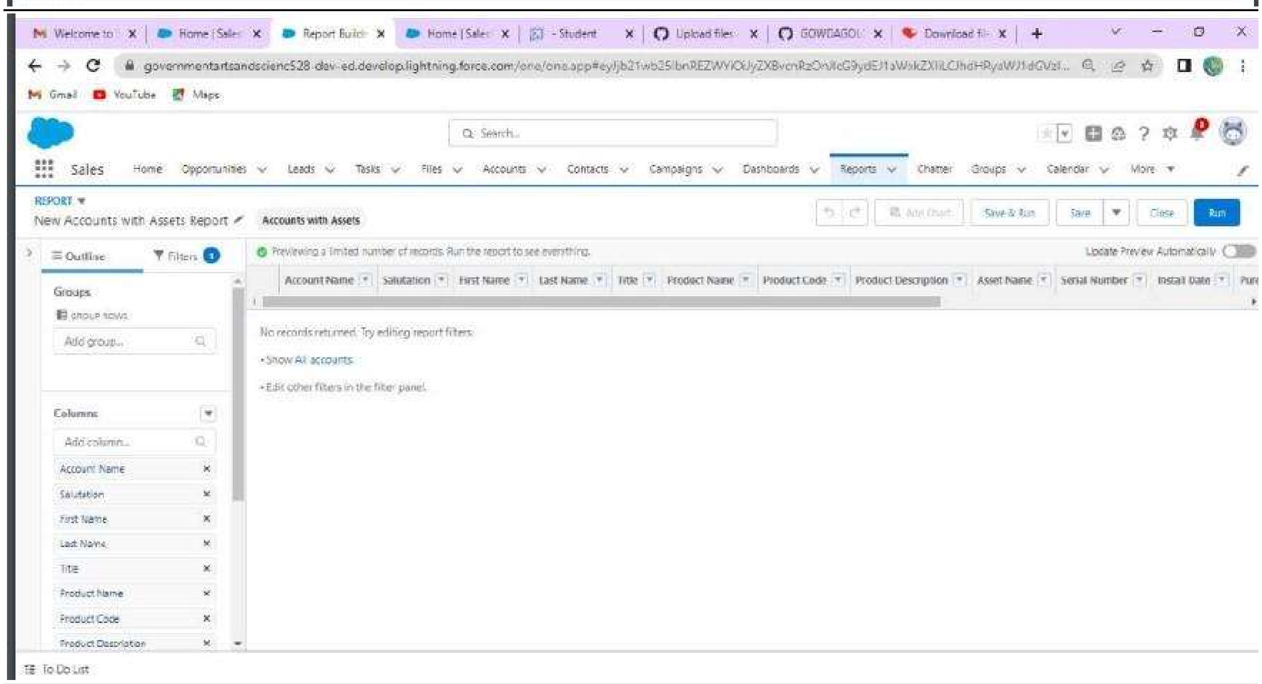
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity 1:


Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More


governmentartsandscienc528-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
Reports
Recent
0 items
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Nothing here yet
After you view a report, it appears here.

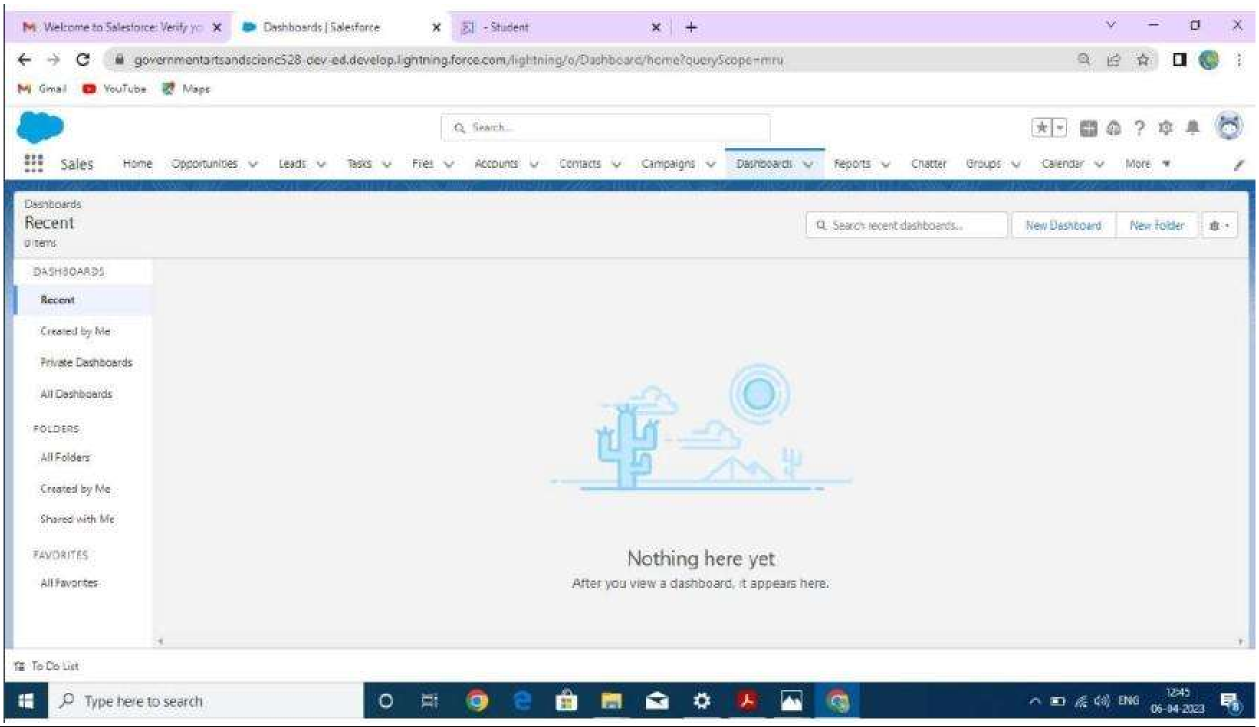


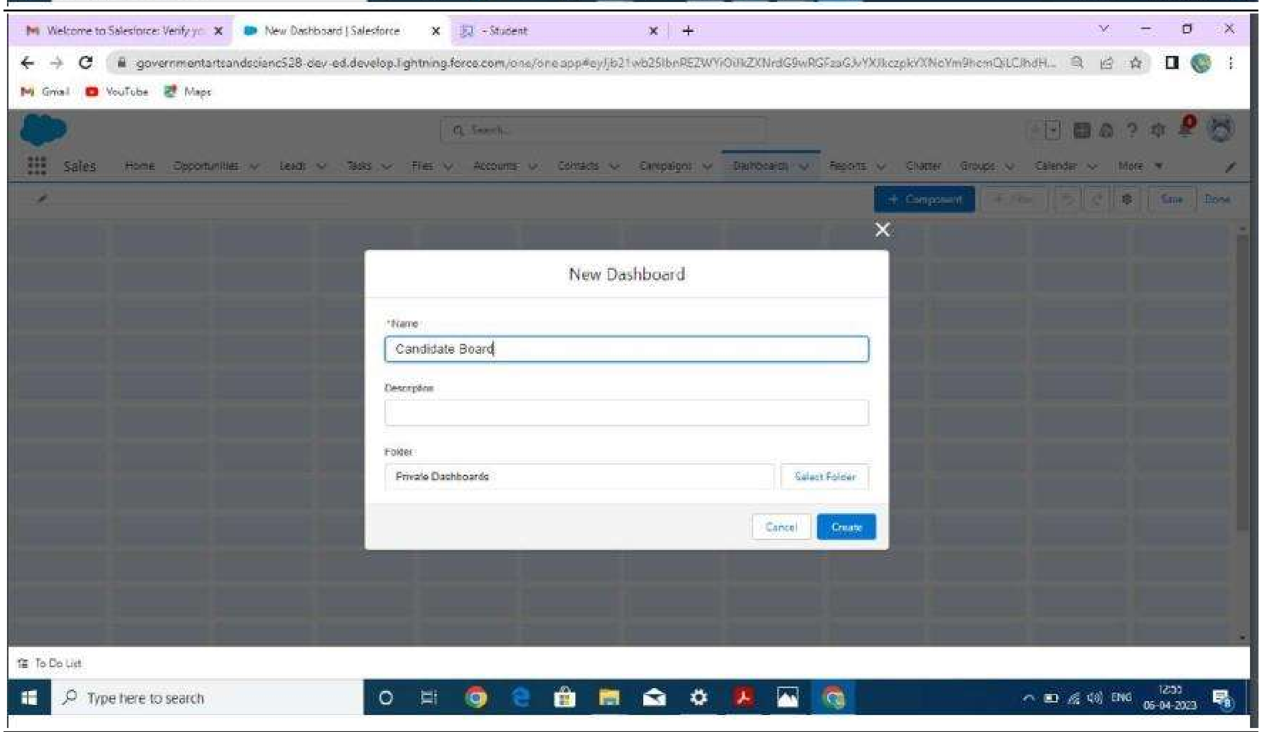


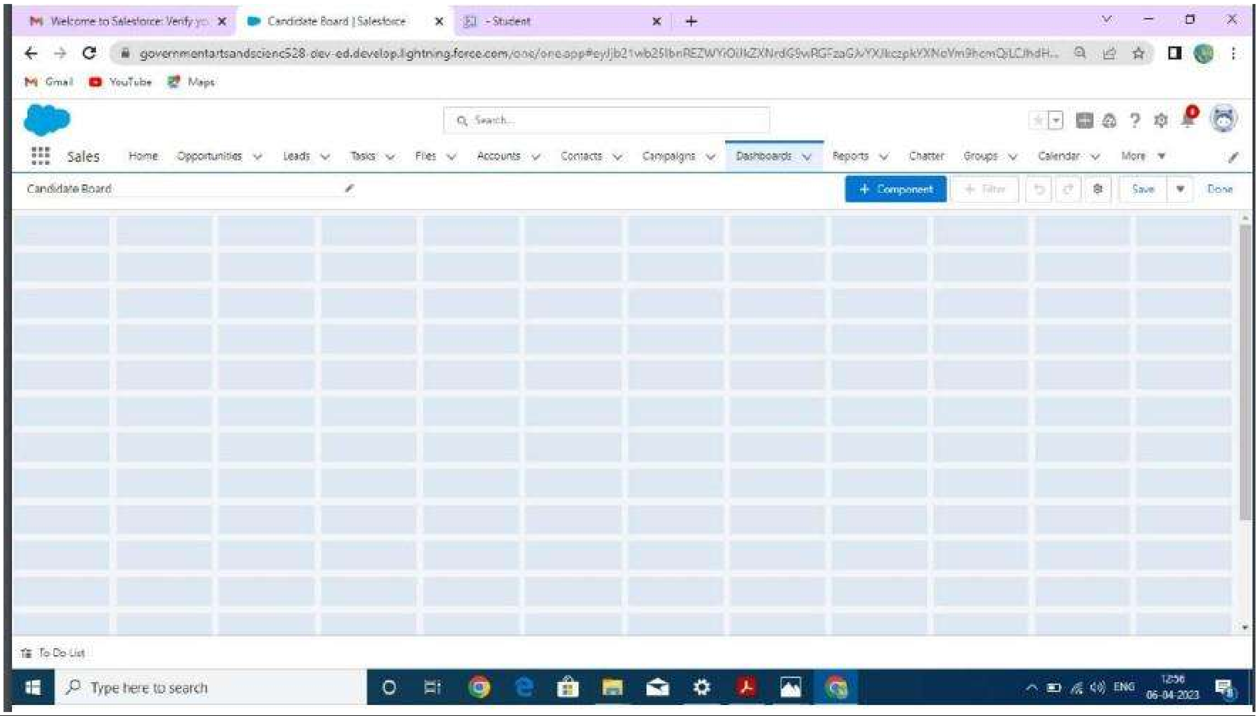
Milestone-6: Dashboards:

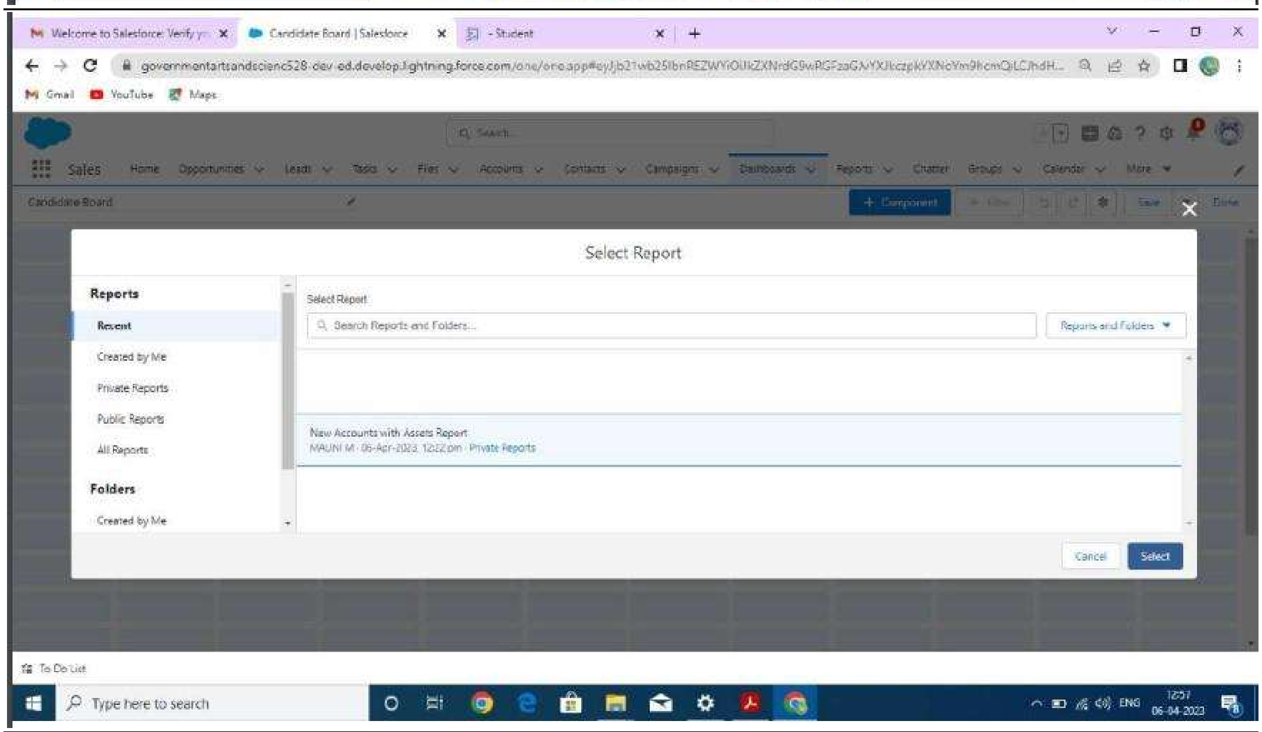
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

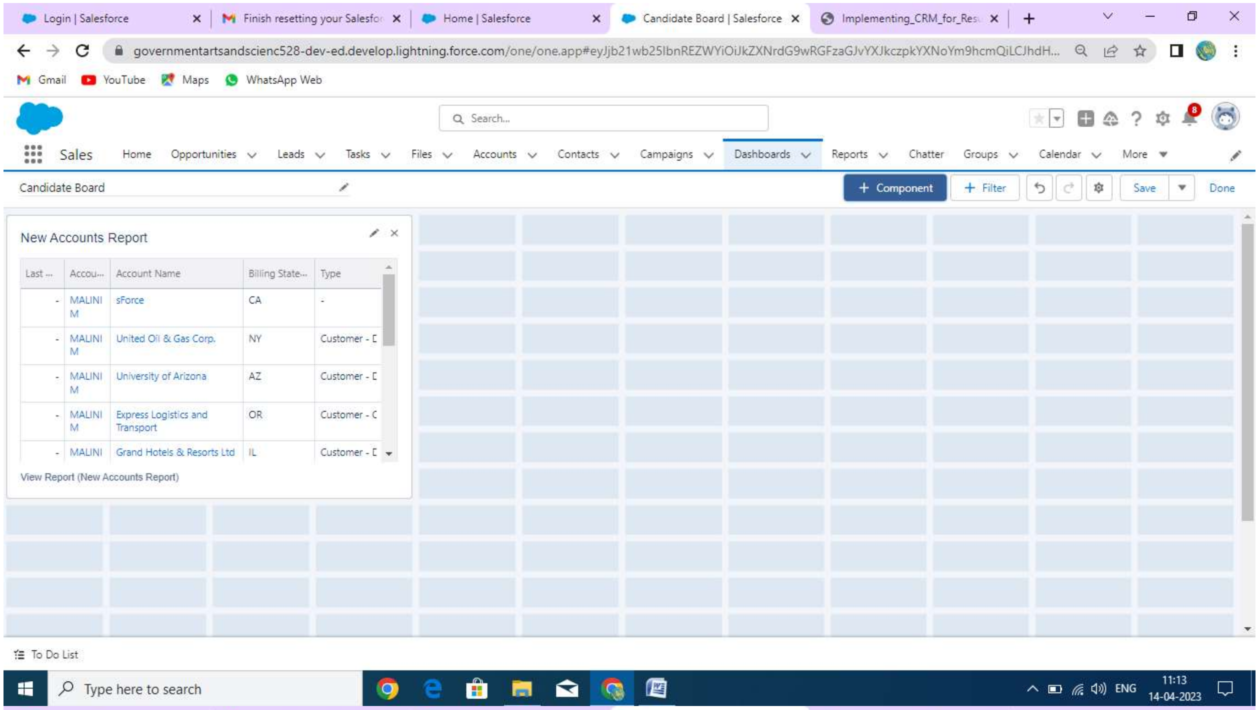
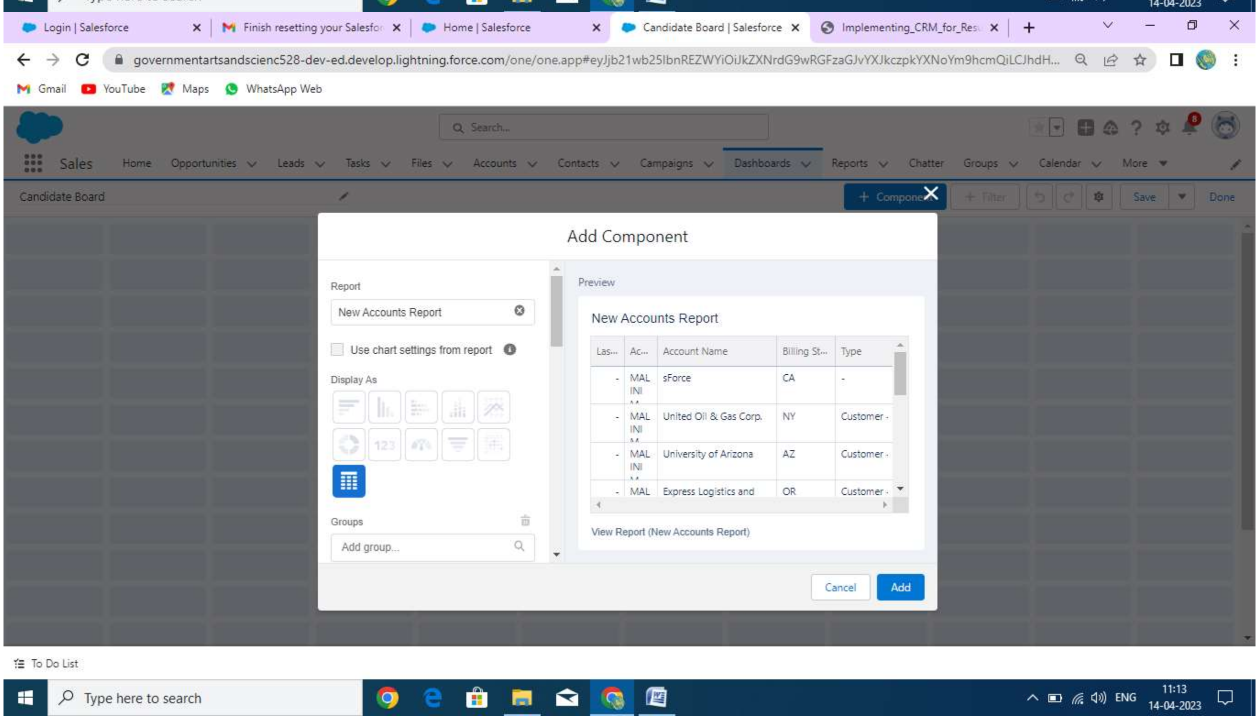
Activity 1:

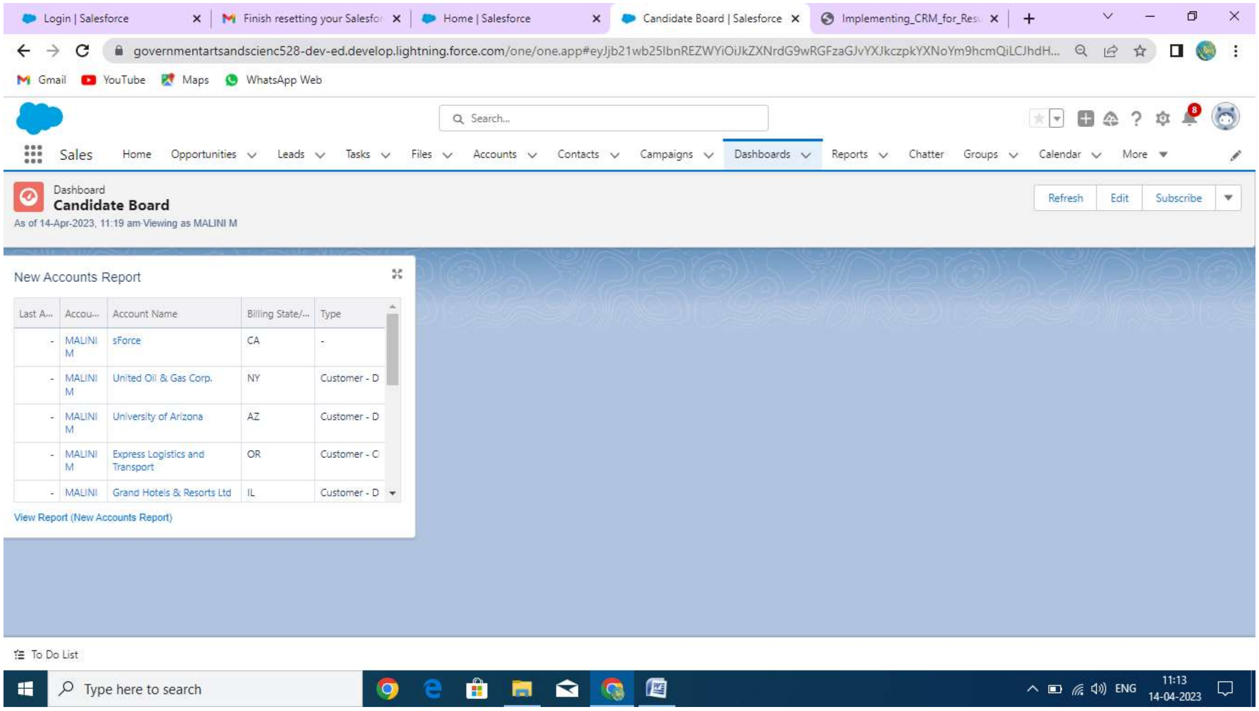

Dashboards
Recent
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
New Dashboard
New Folder
Nothing here yet
After you view a dashboard, it appears here.


New Dashboard
*Name
Candidate Board
Description
Folder
Private Dashboards
Select Folder
Cancel
Create


Candidate Board
+ Component
Save
Done
To Do List


Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Select Report
Search Reports and Folders...
Reports and Folders
New Accounts with Assets Report
Cancel
Select


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 - D
MALINI M | University of Arizona | AZ | Customer - D
MALINI M | Express Logistics and Transport | OR | Customer - C
MALINI M | Grand Hotels & Resorts Ltd | IL | Customer - D
View Report (New Accounts Report)
To Do List

Add Component
Report
New Accounts Report
Use chart settings from report
Display As
Groups
Add group...
Preview
New Accounts Report
Las... | Ac... | Account Name | Billing St... | Type
MAL INI | sForce | CA | -
MAL INI | United Oil & Gas Corp. | NY | Customer -
MAL INI | University of Arizona | AZ | Customer -
MAL | Express Logistics and | OR | Customer -
View Report (New Accounts Report)
Cancel
Add



<u>Trailhead Profile Public URL:</u>

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

<u>ADVANTAGES:</u>

- 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 tomaximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BWM has traversed numerousbusiness 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 is 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 useda 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.