

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

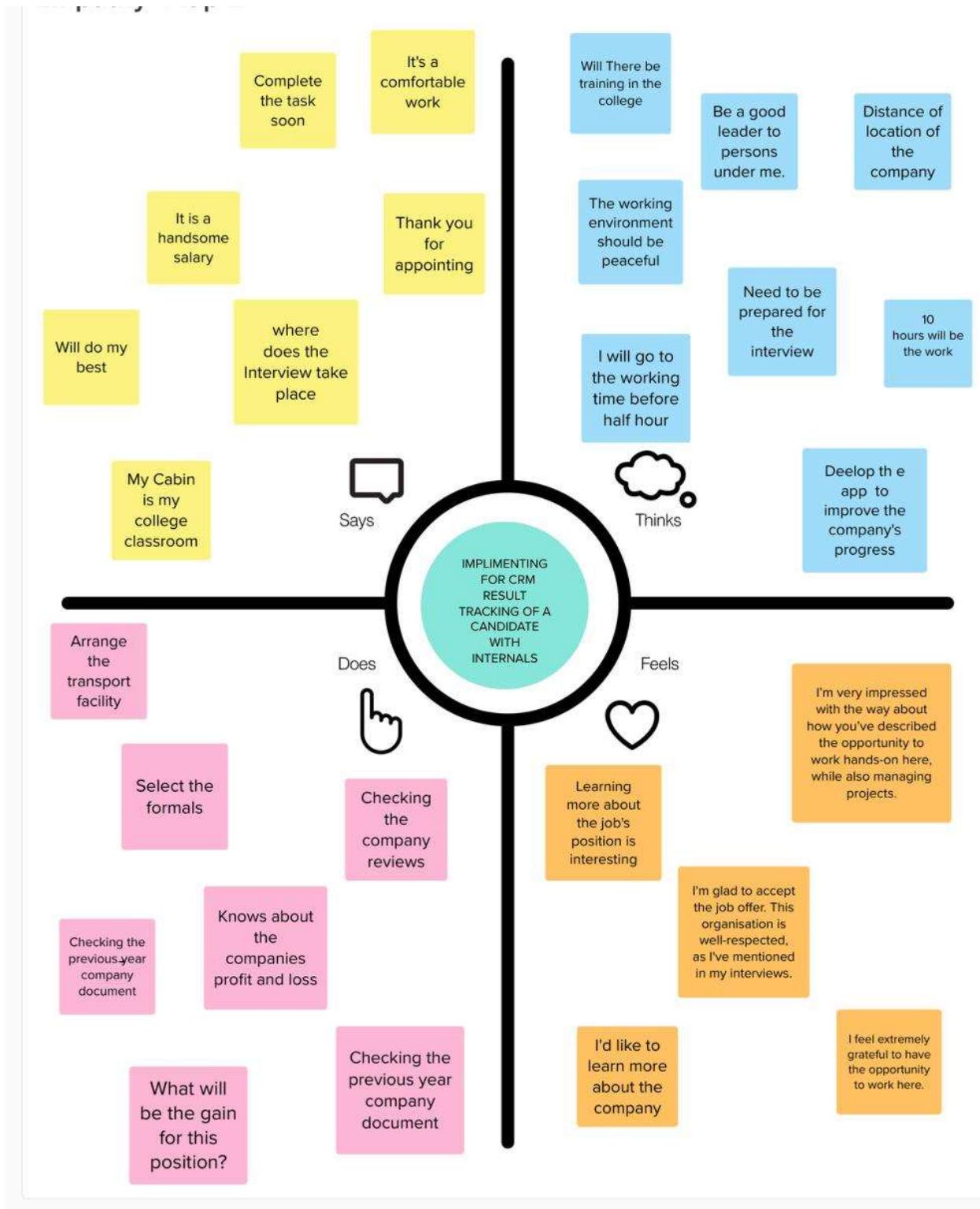
1.2 Purpose

CRM purpose and its importance

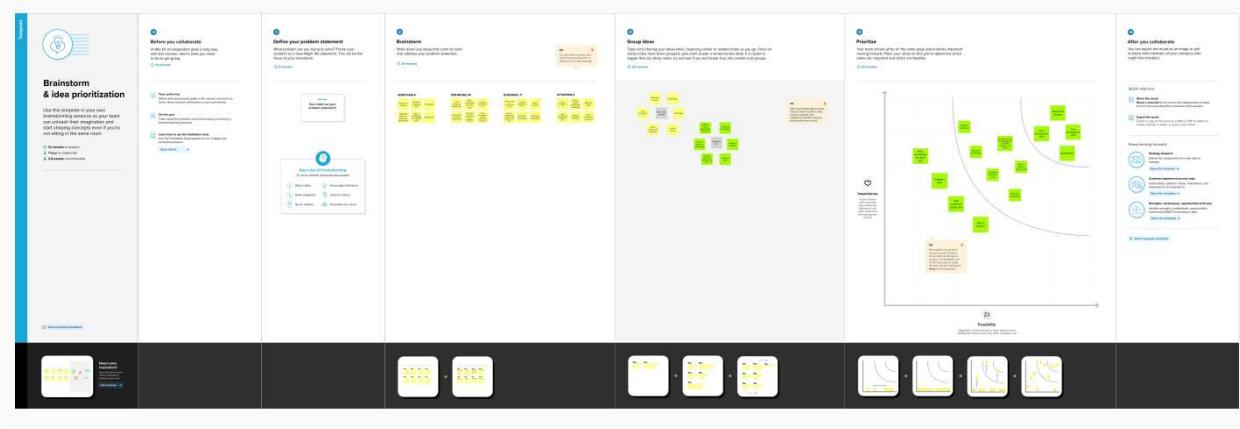
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve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

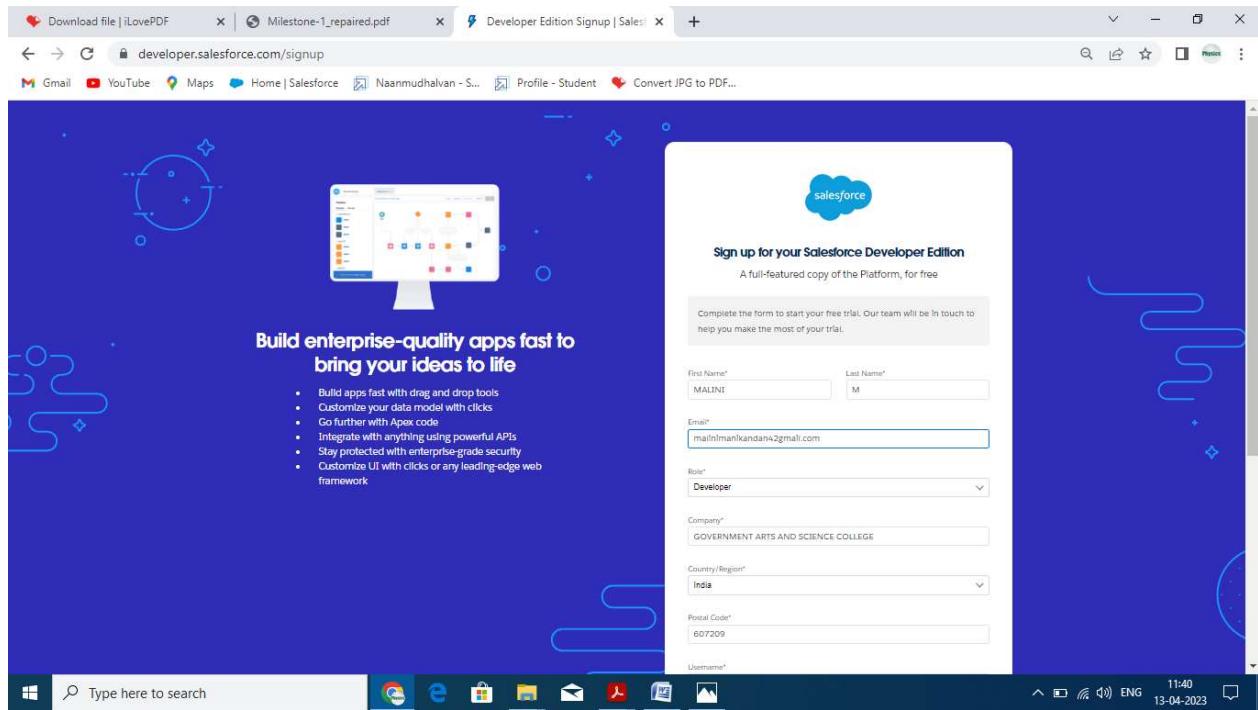
3.2 Activity & Screenshot

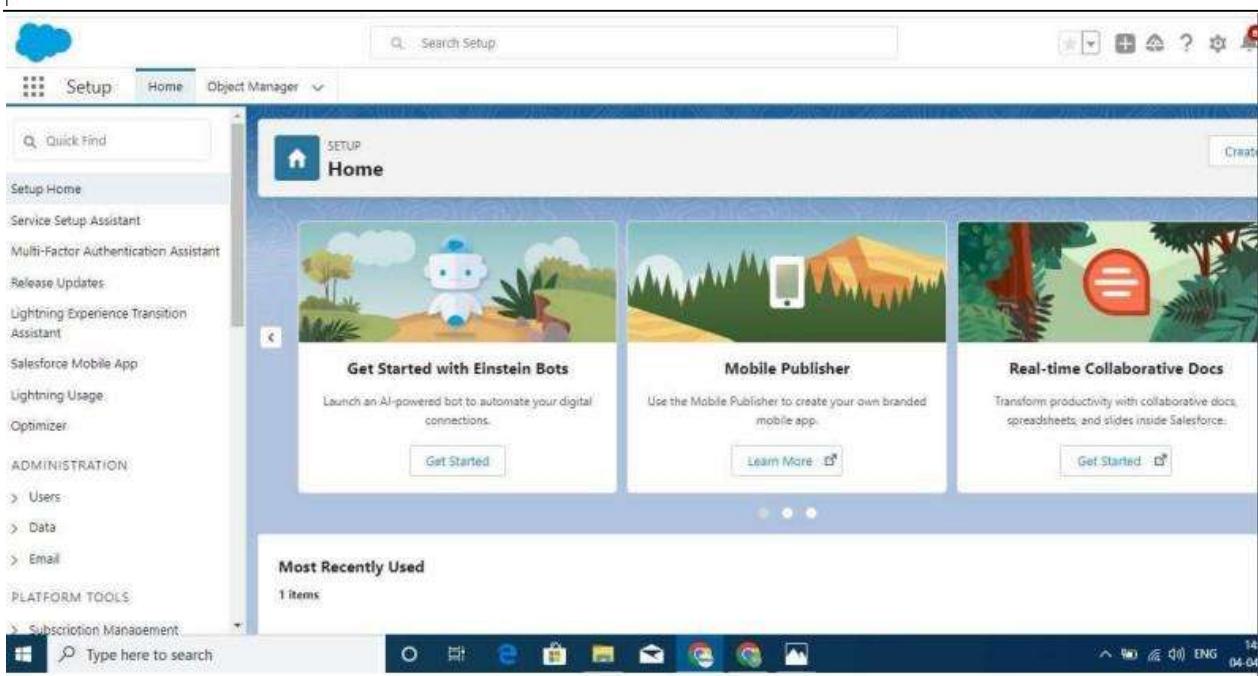
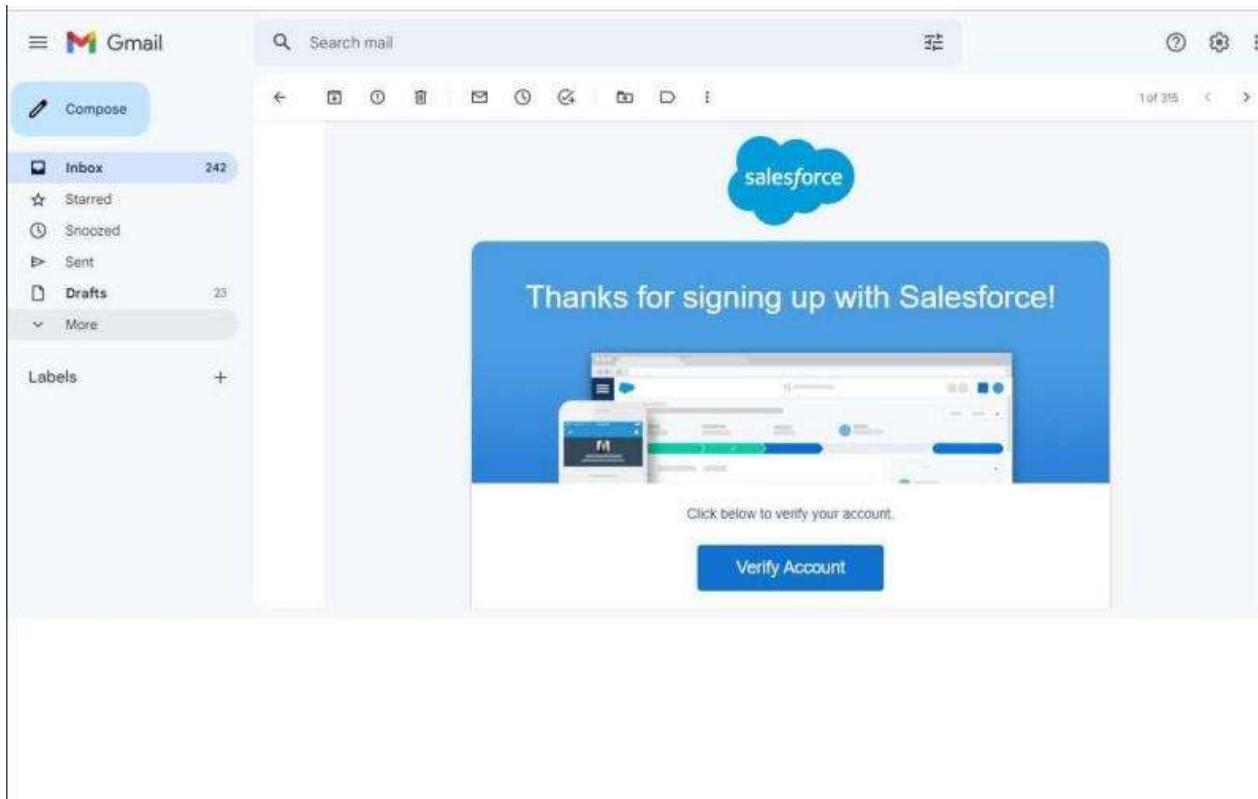
Milestone 1:Creation Salesforce Org:

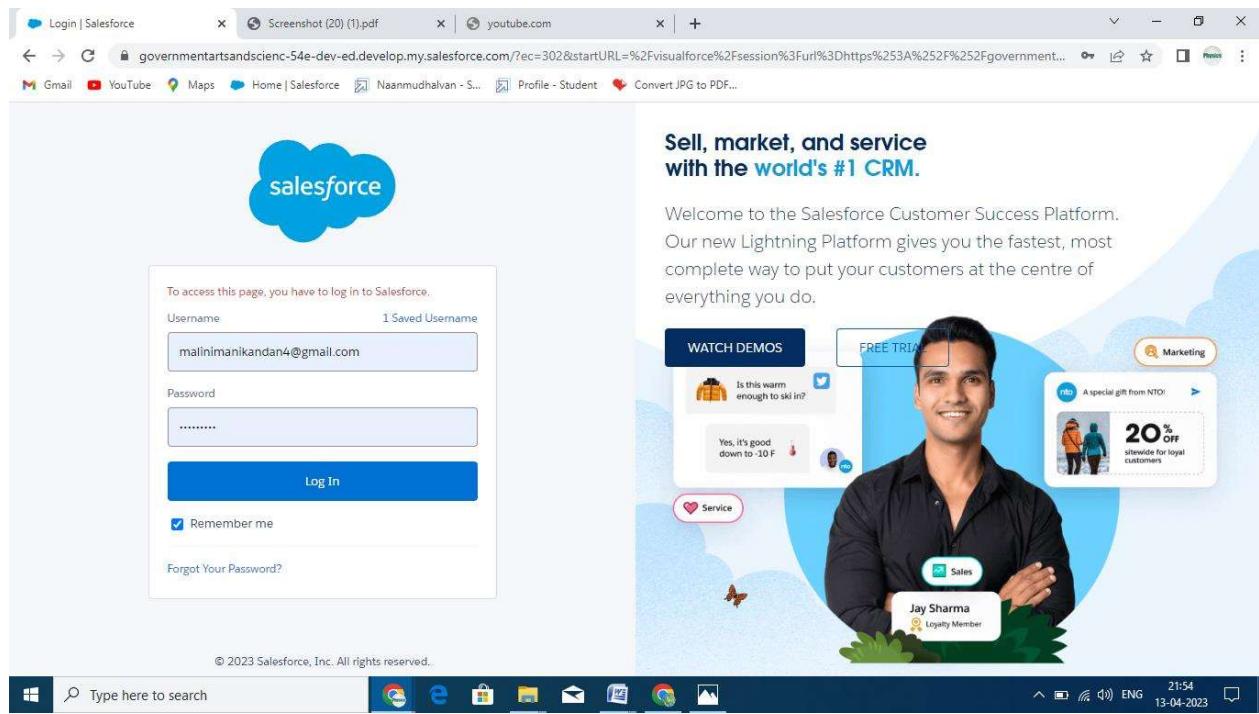
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

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:







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:

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). A sidebar on the left lists various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, and Administration.

The screenshot shows the Salesforce Object Manager page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area displays a table of objects with columns for 'Label', 'API Name', 'Type', 'Description', and 'Last Modified'. A 'Create' button is visible at the top right. The table lists standard objects such as Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, and several others.

The screenshot shows the 'New Custom Object' creation page. The top navigation bar includes 'Setup' and 'Object Manager'. The main content area includes fields for 'Record Name' (set to 'Customer Name'), 'Object Type' (set to 'Standard Object'), and 'Optional Features' (checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing). The 'Object Classification' section indicates it's an Enterprise Application object. Deployment status is set to 'In Development'. Search status is enabled. Object creation options include adding notes and attachments to the default page layout and launching the New Custom Tab Wizard. Buttons at the bottom include 'Save' and 'Cancel'.

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label	<input type="text" value="semester"/>	Example: Account
Plural Label	<input type="text" value="semesters"/>	Example: Accounts
starts with lower case	<input type="checkbox"/>	

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

Object Name	<input type="text" value="semester"/>	Example: Account
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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 tabs, 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	<input type="text" value="semester Name"/>	Example: Account Name
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Data Type

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Extend Limitations

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

User View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name

semester__c

Custom

Singular Label

semester

Plural Label

semesters

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Setting

Standard salesforce.com Help Window

Edit **Delete**

Activity-2:

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label	<input type="text" value="Candidate"/>	Example: Account
Plural Label	<input type="text" value="Candidates"/>	Example: Accounts
starts with lower case	<input type="checkbox"/>	

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

Object Name	<input type="text" value="Candidate"/>	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 tabs, 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	<input type="text" value="Candidate Name"/>	Example: Account Name
-------------	---	-----------------------

Data Type

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups

New Custom Object

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 is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Recent Name: Candidate Name Example: Account Name

Date Type: Text

Optional Features

- 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 Bulk API Access
- Allow Streaming API Access

Deployment Status

- 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 objects are first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Details

Candidate

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
- Row Triggers
- Validation Rules

Details

Description

API Name: Candidate__c

Custom: ✓

Singular Label: Candidate

Plural Label: Candidates

Enable Reports: ✓

Task 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

Custom Object Information

The singular and plural labels are used in URLs, pages, service, and reports.

Label: Candidate__c

Plural Label: Candidates

SameWithParent Label: ✓

User Object Name (used when referencing the object via the API):

Apex Name: Candidate__c

Describe:

Content Generation Only Setting:

- Open the standard Salesforce.com Help & Training section
- Use a custom Help & Training section

Contact Name:

Record Name:

Date Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

New Custom Object

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

Record Name: Course Detail Name Example: AccountName

Data Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Page History
- Allow Cross-Object
- 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 Standard API Access
- Allow Advanced API Access
- Allow Documenting API Access

Deployment Status

- 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 to the default page layout
- Launch New Custom Tab Wizard after saving this custom object

Save | Save & New | Cancel

SETUP > OBJECT MANAGER Course Detail

Details

Details		Edit Delete	
Description: API Name: Course_Detail__c Label: Course Detail Plural Label: Course Details Record Type: Course Details		Create Reports: <input checked="" type="checkbox"/> Track Activities: <input type="checkbox"/> Track Page History: <input type="checkbox"/> Deployment Status: DEPLOYED Help: Standard Salesforce.com Help / Wikipedia	

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

User View Custom Layouts

Restriction Rules

Scoping Rules

Triggers

Row Triggers

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Edit this object](#) [Edit this object's shared access](#)

Custom Object Definition Edit

Custom Object Information

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

Label: Lecturer Detail Example: Account
 Plural Label: Lecturer Details Example: Accounts
 Starts with vowel sound:

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

Object Name: Lecturer Example: Account

Description:

Contact/Lead/Opportunity Help Setting: Open the standard Salesforce.com Help & Training window Open a customized a Salesforce page
 Contact Name: None

Enter Record Name Label and Format

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

Record Name: Lecturer Name Example: Account Name

Data Type: Text

Optional Features

- Allow Reports
- Allow Activities

New Custom Object

Object Settings

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Other 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

- 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

Lecturer Detail

Details

Description

API Name: Lecturer__c
Custom: ✓
Singular Label: Lecturer Detail
Plural Label: Lecturer Details

Enable Reports: ✓
Track Activities:

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

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:

Lightning Experience App Manager

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 '23 release notes.

Enable App Cloning

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in...
All Tabs	AllTabs		04/04/2023, 2:03 pm	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboard and apps	04/04/2023, 2:03 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	04/04/2023, 2:05 pm	Classic	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/04/2023, 2:05 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	04/04/2023, 2:05 pm	Classic	✓
Content	Content	Salesforce CRM Content	04/04/2023, 2:05 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to review limits, monitor usage, and manage requests.	04/04/2023, 2:03 pm	Lightning	✓
Digital Experiences	ExperienceCloud	Manage content and media for all of your sites.	04/04/2023, 2:03 pm	Lightning	✓
Lightning Usage App	LightningUsage	View Adoption and Usage Metrics for lightning Experience	04/04/2023, 2:03 pm	Lightning	✓
Marketing	Marketing	Built-in, on-demand marketing automation	04/04/2023, 2:03 pm	Classic	✓
Payouts	Payouts	The fundamental Lightning Platform	04/04/2023, 2:03 pm	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business	04/04/2023, 2:03 pm	Lightning	✓

The screenshot shows two sequential steps in the 'New Lightning App' setup:

Step 1: App Details & Branding

- App Details:**
 - *App Name: Candidate Internal Results Card
 - *Developer Name: Enter a developer name...
 - Description: Enter a description...
- App Branding:**
 - Image: Upload (with a placeholder image)
 - Primary Color Hex Value: #0070C0
 - Org Theme Options:
 - Use the app's Image and color instead of the org's custom theme
- App Launcher Preview:** A small preview window showing a blue bar.

Step 2: User Profiles

Choose the user profiles that can access this app.

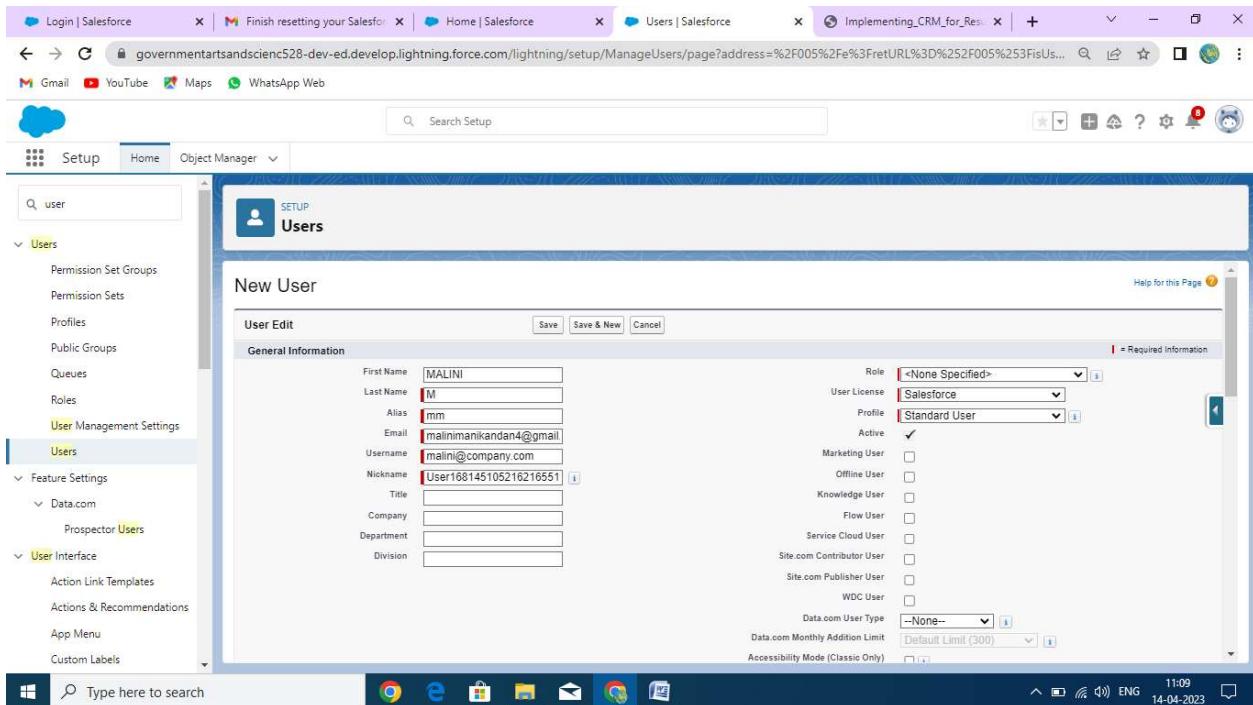
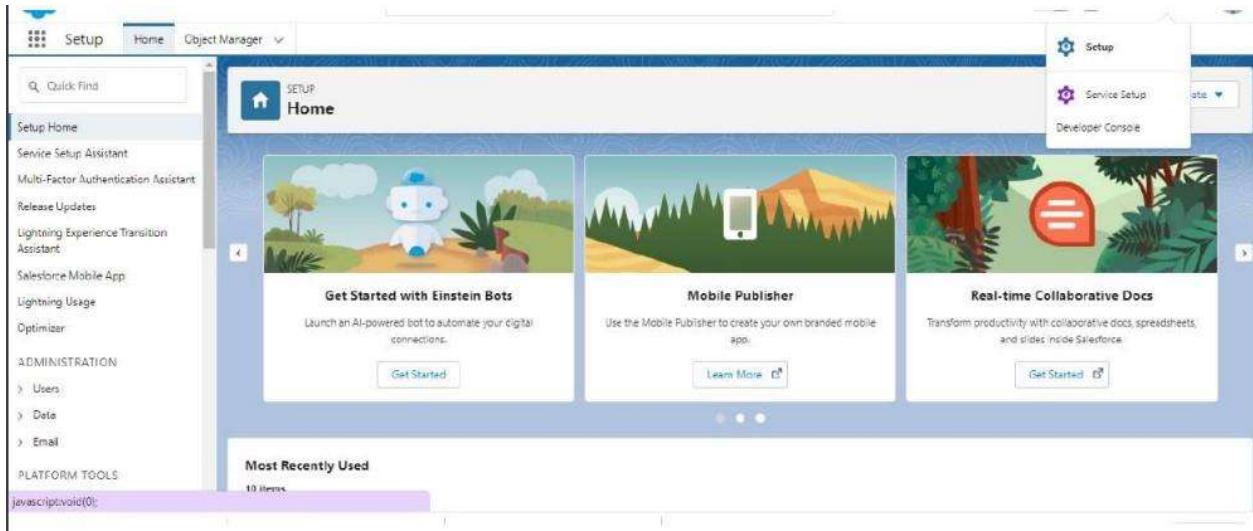
Available Profiles	Selected Profiles
User Profile	No Profiles selected

Buttons at the bottom: Back, Next, Save & Finish.

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 displays two screenshots of a web browser window, likely Google Chrome, showing a Salesforce Lightning interface. The top screenshot shows a blank page with a navigation bar at the top and a main content area below. The bottom screenshot shows the 'Reports' section of the Salesforce interface.

Screenshot 1 (Top): This screenshot shows a blank page with a navigation bar at the top. The navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. Below the navigation bar is a search bar and a toolbar with various icons.

Screenshot 2 (Bottom): This screenshot shows the 'Reports' section of the Salesforce interface. The left sidebar has a 'REPORTS' section with 'Recent' selected, showing options like 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. It also has 'FOLDERS' and 'FAVORITES' sections. The main content area features a blue illustration of a desert landscape with a sun, clouds, and cacti. Below the illustration, the text 'Nothing here yet' is displayed, followed by the sub-instruction 'After you view a report, it appears here.'

The top screenshot shows the 'Create Report' dialog box in the Salesforce Report Builder. The 'Category' sidebar on the left lists various report types: Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, and Contracts and Orders. The main area is titled 'Select a Report Type' and contains a search bar and a table of report types. The 'Accounts with Assets' report is selected, showing its details: Standard Category, Created By You (No reports yet), and Created By Others (No reports yet). The bottom screenshot shows the preview of the 'Accounts with Assets' report. It has an 'Outline' tab selected, showing columns for Account Name, Salutation, First Name, Last Name, Title, Product Name, Product Code, Product Description, Asset Name, Serial Number, and Install Date. A message indicates 'No records returned. Try editing report filters.' with options to 'Show All accounts' or 'Edit other filters in the filter panel.'

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 screenshot shows two instances of the Salesforce Lightning interface. The top instance displays the 'Dashboards' screen with a sidebar containing 'Recent', 'DASHBOARDS', 'FOLDERS', and 'FAVORITES' sections. The main area features a blue cartoon illustration of a cactus in a desert landscape with clouds and a sun. Below the illustration, the text 'Nothing here yet' is displayed, followed by the sub-instruction 'After you view a dashboard, it appears here.' The bottom instance shows a 'New Dashboard' modal window. The 'Name' field contains 'Candidate Board', and the 'Folder' field is set to 'Private Dashboards'. The modal includes 'Cancel' and 'Create' buttons.

This screenshot shows the Candidate Board page in the Salesforce interface. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. Below the navigation is a search bar and a toolbar with buttons for Component, Filter, Save, and Done. The main area is a large, empty grid labeled "Candidate Board". At the bottom left, there is a "To Do List" icon.

This screenshot shows a "Select Report" dialog box overlaid on the Salesforce interface. The dialog has a sidebar on the left with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports) and Folders (Created by Me). The main area displays a list of reports, with one item highlighted: "New Accounts with Assets Report" created by MAUNI M on 06-Apr-2023 at 12:22 PM. A "Select" button is visible at the bottom right of the dialog. The background shows the same Candidate Board interface as the previous screenshot.

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

+ 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 M	Grand Hotels & Resorts Ltd	IL	Customer - C	

View Report (New Accounts Report)

To Do List:

Type here to search

New Accounts Report

Report

New Accounts Report

Display As

Groups

Add group...

Preview

New Accounts Report

Last ...	Ac...	Account Name	Billing St...	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	

View Report (New Accounts Report)

Cancel Add

Type here to search

11:13 14-04-2023

New Accounts Report

Last A...	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:

Type here to search

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 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.