



WELCOME

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

TEAM MEMBERS

- **DIVYA .P**
- **ELAKKIYA.A**
- **GEETHA.S**
- **HEMAVATHY.M.R**

INTRODUCTION:

Overview

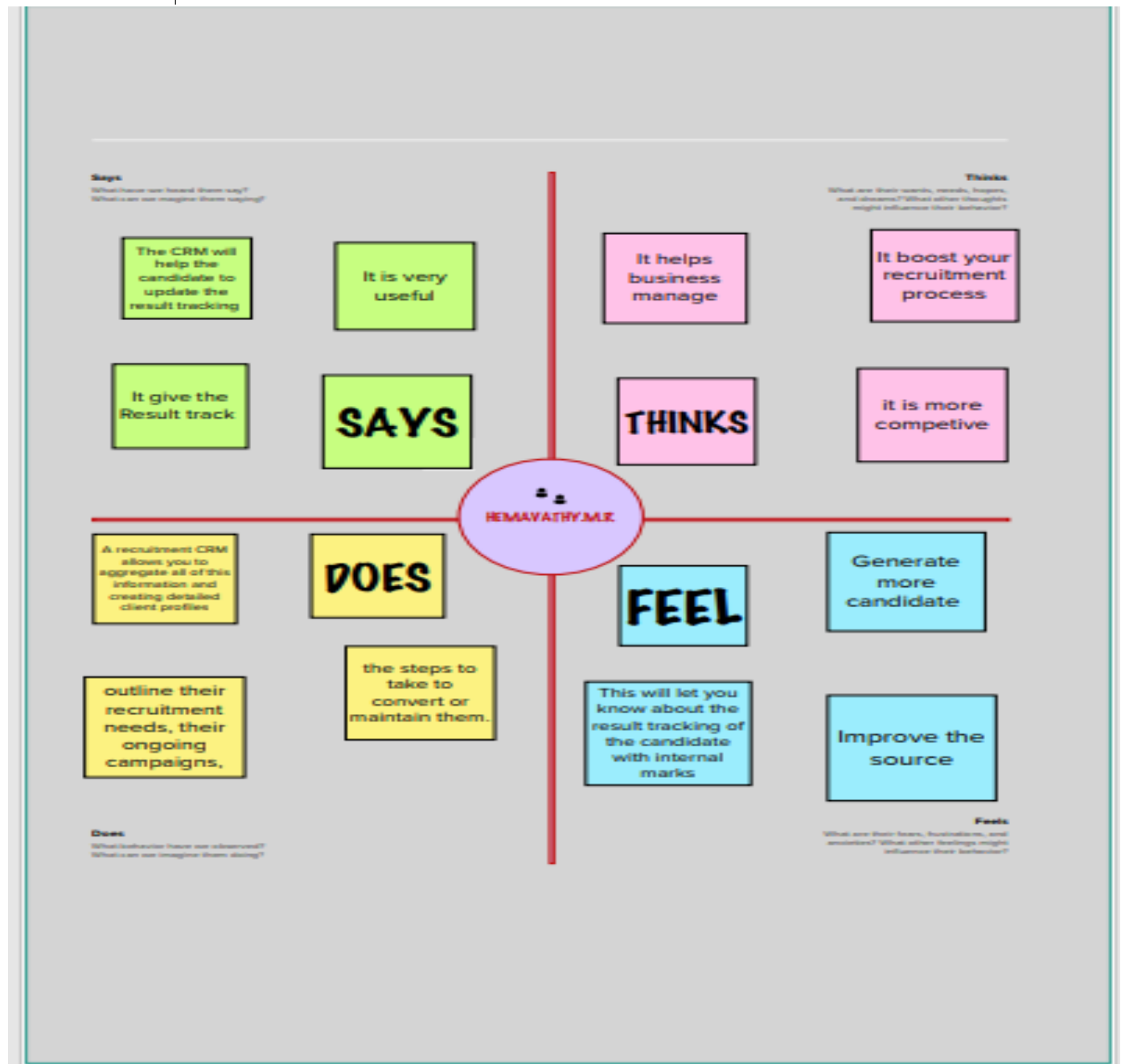
CRM is a combination of practices, strategies and technologies that companies used to manage and analyze customer interactions and data throughout the customer's lifecycle.

The goal is to improve customer's service relationships and assist in customer retention and drive sales growth.

Purpose

The purpose is to enable team to work together towards meeting a common target. It helps to get rid of silos and helps business people across different departments.

EMPATHY MAP



IDEATION & BRAINSTORMING MAP

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

15 minutes

DIYVA.P



ELABITVA



CRITHAL.S



MINIQUANTITY.NE



3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence like what if a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

15 minutes

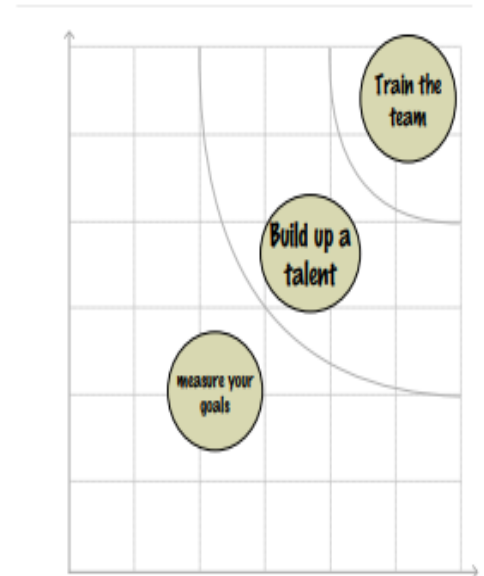


4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

15 minutes



Data Model:

Object Name	Fields in the Object	
Obj1		
	Field lable	Data type
	Semester Name	Text
Obj2		
	Field lable	Data type
	Candidate Name	Text

MILESTONE: 1

Activity1: Creating Developer Account

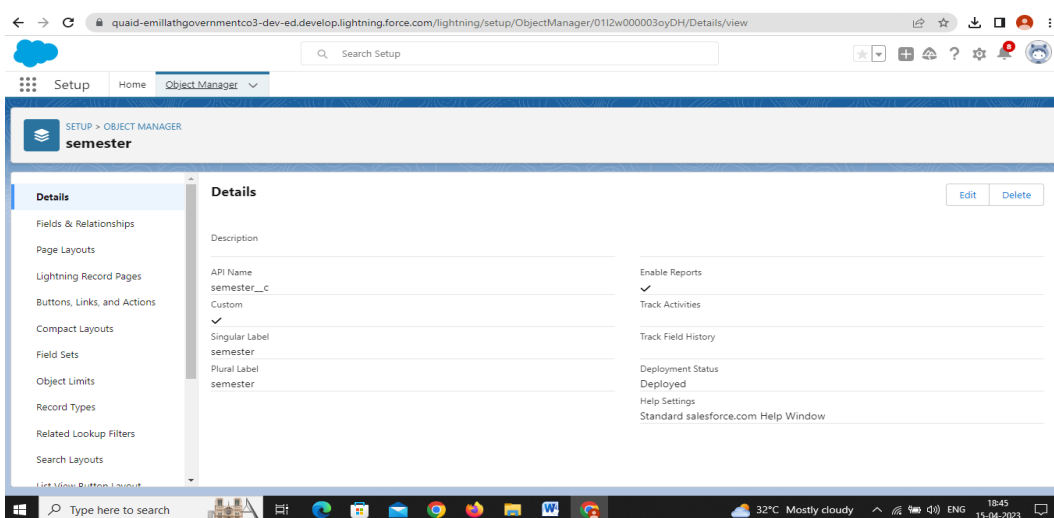
The screenshot shows the Salesforce Setup Home page in a web browser. The browser's address bar displays the URL: `quaid-emillathgovernmentco3-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home`. The page features a top navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and a user profile icon. Below the navigation bar, the "Setup" tab is selected, and the "Home" sub-tab is active. A left-hand sidebar contains a "Quick Find" search bar and a list of setup categories: "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", "ADMINISTRATION" (with sub-items "Users", "Data", "Email"), "PLATFORM TOOLS" (with sub-items "Subscription Management", "Apps"), and "More". The main content area is titled "SETUP Home" and includes a "Create" button. It displays three featured cards: "Get Started with Einstein Bots" (with a "Get Started" button), "Mobile Publisher" (with a "Learn More" button), and "Real-time Collaborative Docs" (with a "Get Started" button). Below these cards is a section titled "Most Recently Used" showing "10 items". At the bottom of the page, a table header is visible with columns for "NAME", "TYPE", and "OBJECT". The Windows taskbar at the bottom shows the search bar, task view icon, and several application icons, along with system information: 32°C, Mostly cloudy, 18:44, and 15-04-2023.

MILESTONE-2: Object

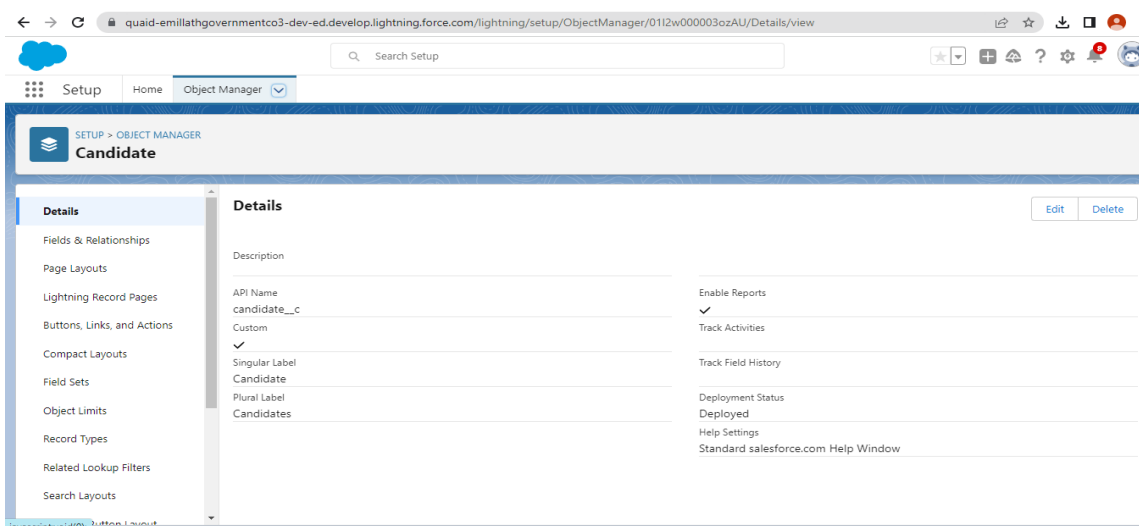
Salesforce objects are database tables that permit you to store data that is specific to an organisation.

Activity-1: Create an object

1. SEMESTER



2. CANDIDATE



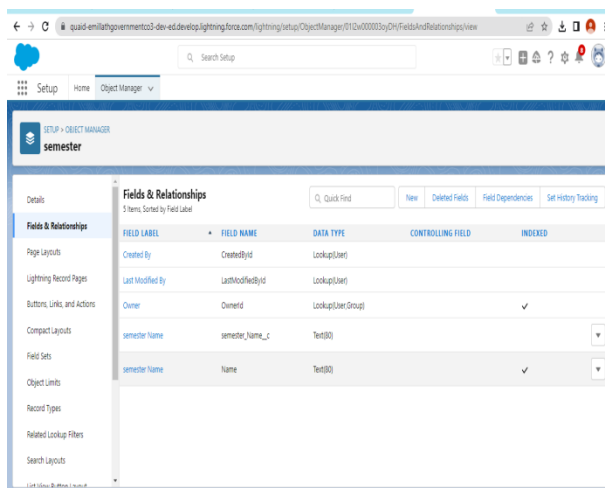
NOTE: Similarly we have done for 3.Course Details 4.Lecturer Details 5.Internal results

MILESTONE -2: Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object.

Activity-1:

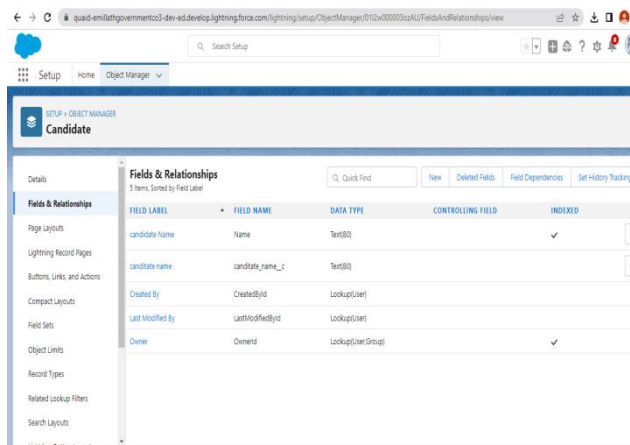
SEMESTER NAME



The screenshot shows the Salesforce Setup interface for the 'Semester' object. The 'Fields & Relationships' tab is selected, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are 'Created By', 'Last Modified By', 'Owner', 'Semester Name', and 'Semester Name'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Semester Name	Semester_Name__c	Text(80)		
Semester Name	Name	Text(80)		✓

CANDIDATE NAME



The screenshot shows the Salesforce Setup interface for the 'Candidate' object. The 'Fields & Relationships' tab is selected, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are 'Candidate Name', 'Candidate Name', 'Created By', 'Last Modified By', and 'Owner'.

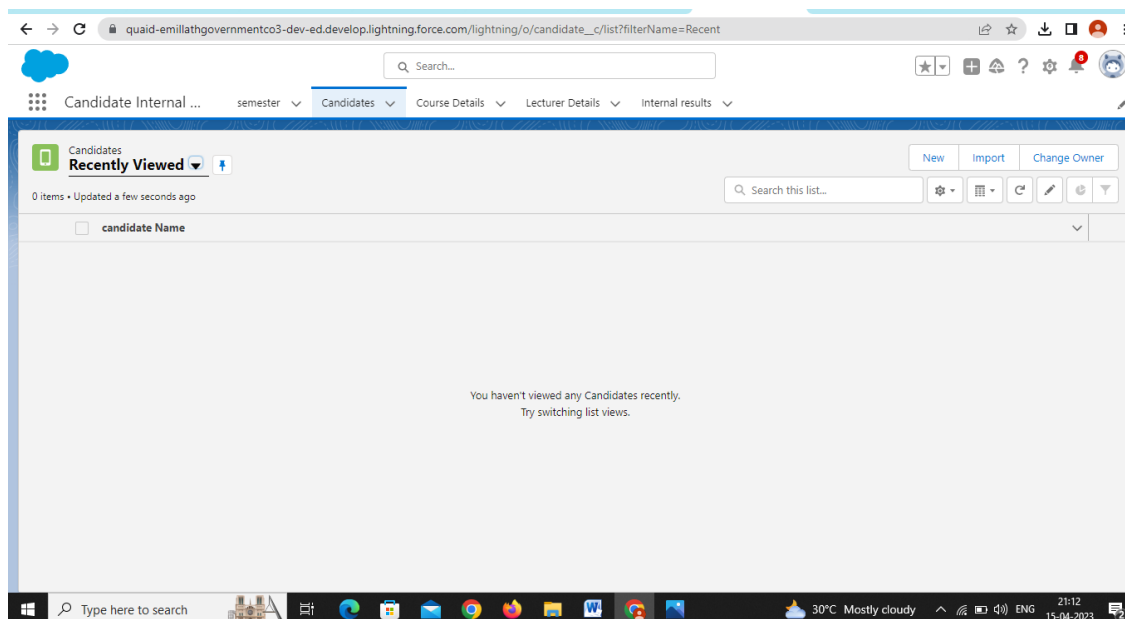
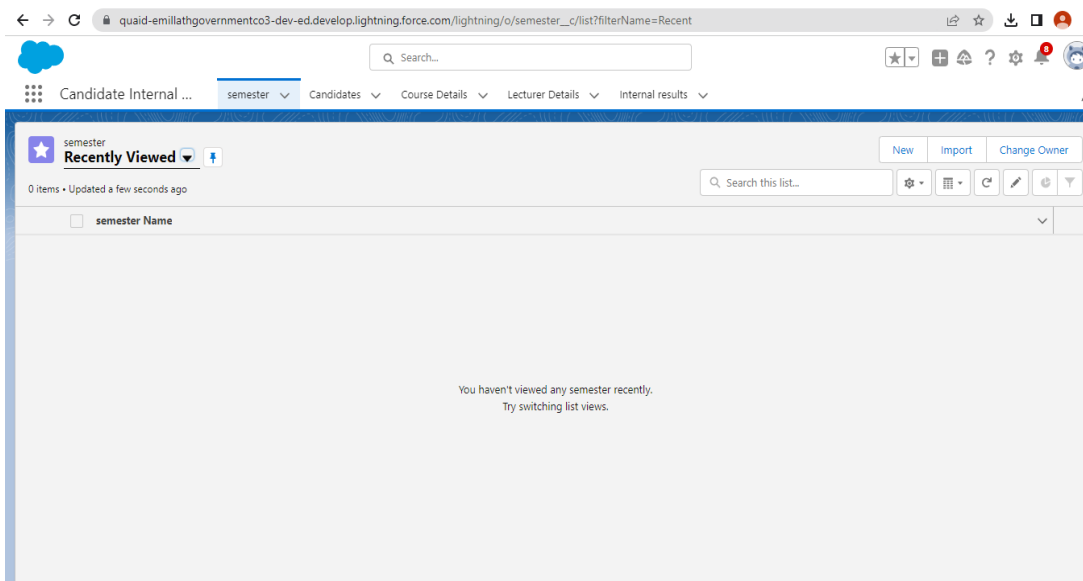
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Name	Name	Text(80)		✓
Candidate Name	Candidate_name__c	Text(80)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

NOTE: similarly we done for Course Name, Lecturer Role, Candidate ID

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: Create the Candidate Internal Result Card app



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.

The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and User Interface. The main content area is titled "All Users" and includes a search bar, a "View" dropdown set to "All Users", and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: User_Integration, User_Security, Chatter_Expert, M.R. Hemavathy, and M.R. Hemavathy. The bottom of the page shows a URL bar with the address: https://quaid-emillathgovernmentco3-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	User_Integration	inteo	integration@00d2w0000rouohean.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2w0000rouohean.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d2w0000rouohean.015ctunc3i@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	M.R. Hemavathy	hm.r	hemavathy@acme.com		✓	Read Only
<input type="checkbox"/> Edit	M.R. Hemavathy	HM.R	hema@gmpc.com		✓	System Administrator

The screenshot shows the Salesforce Setup page for a specific user profile, "Hemavathy M.R.". The left sidebar is the same as the previous screenshot. The main content area is titled "Hemavathy M.R." and includes a "User Detail" section with a table of user information. The table has columns for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, and Issis Only. The table lists the user's details: Name: Hemavathy M.R., Alias: hm.r, Email: hemavathyanganathan2601@gmail.com, Username: hemavathy@acme.com, Nickname: User16806181942296150231, Title: , Company: , Department: , Division: , Address: , Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approver: , Role: , User License: Salesforce, Profile: Read Only, Active: ✓, Marketing User: , Offline User: , Knowledge User: , Flow User: , Service Cloud User: , Site.com Contributor User: , Site.com Publisher User: , WDC User: , Mobile Push Registrations: View, Data.com User Type: , Issis Only: . The bottom of the page shows a URL bar with the address: https://quaid-emillathgovernmentco3-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0052w0000GtoMV?noredirect=1&isUserEntityOverride=1&isdt=p1.

Name	Alias	Email	Username	Nickname	Title	Company	Department	Division	Address	Time Zone	Locale	Language	Delegated Approver	Role	User License	Profile	Active	Marketing User	Offline User	Knowledge User	Flow User	Service Cloud User	Site.com Contributor User	Site.com Publisher User	WDC User	Mobile Push Registrations	Data.com User Type	Issis Only
Hemavathy M.R.	hm.r	hemavathyanganathan2601@gmail.com	hemavathy@acme.com	User16806181942296150231						(GMT+05:30) India Standard Time (Asia/Kolkata)	English (India)	English			Salesforce	Read Only	✓								View			

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:

← → ↻ 🔒 quaid-emillathgovernmentco3-dev-ed.develop.lightning.force.com/one/app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVz...

Candidate Internal ... semester Candidates Course Details Lecturer Details Internal results Reports

Create Report

Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders

Select a Report Type
Search Report Types...
Recently Used Report Types

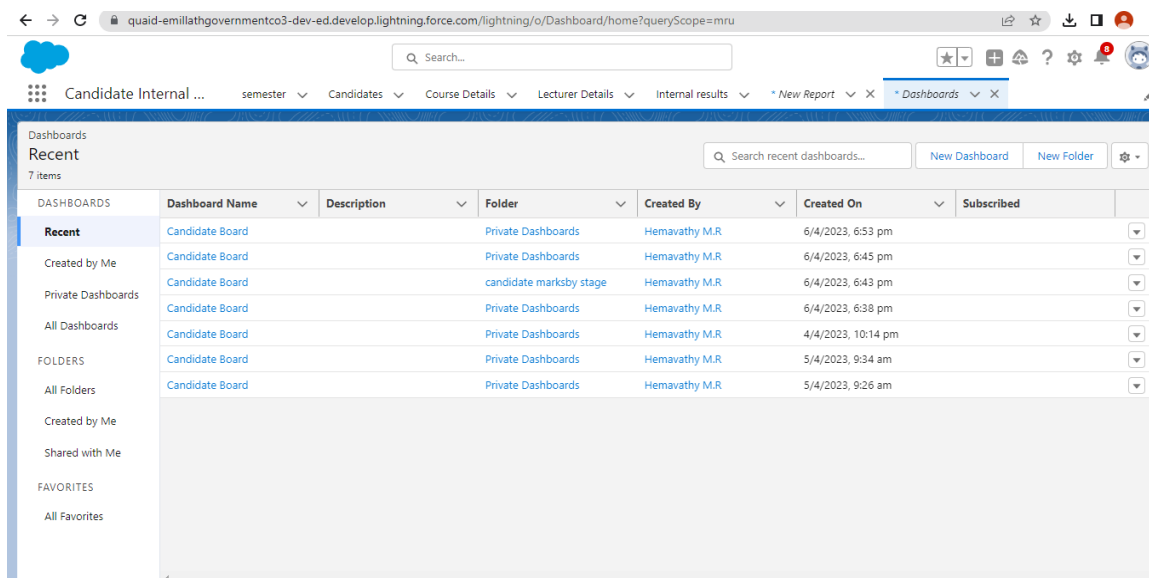
Report Type Name	Category
Candidate with candidate Marks	Standard
Candidate Marksby Stages	Standard

Details
Candidate with candidate Marks
Standard Report Type
Start Report
Details Fields (12)
Created By You
New Report
Last Used 4/6/2023
Created By Others
No Reports Yet

<https://quaid-emillathgovernmentco3-dev-ed.develop.lightning.force.com/reports/lightningReportAppapp#>

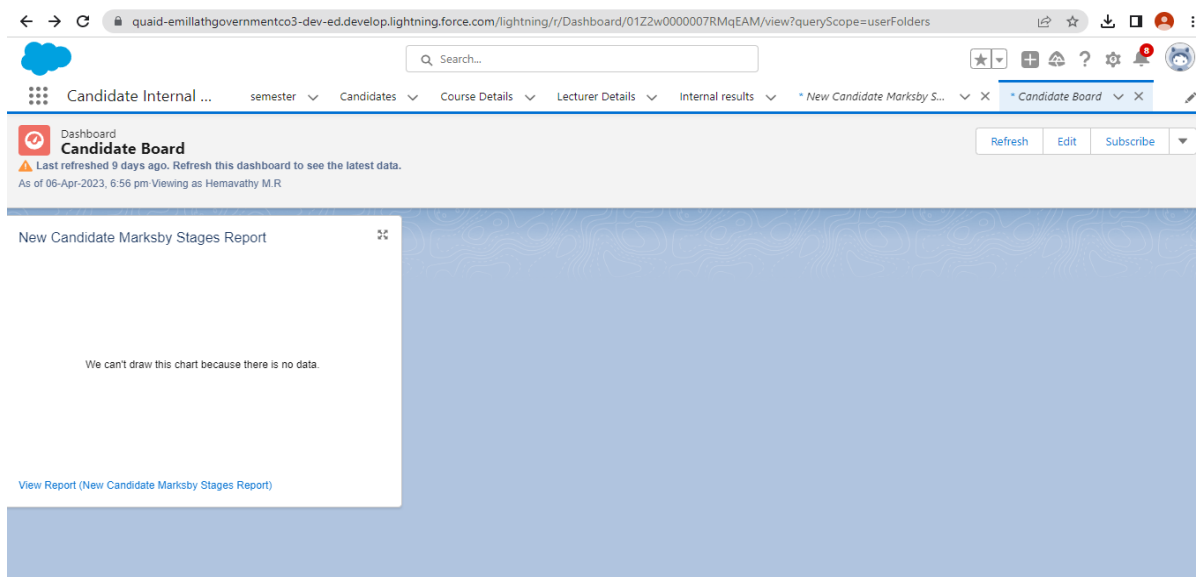
MILESTONE-6: Dashboards

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.



This screenshot shows the 'Recent' list of dashboards in Salesforce. The interface includes a search bar, 'New Dashboard' and 'New Folder' buttons, and a table of recent dashboards. The table has columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The 'Recent' section lists 7 items, including 'Candidate Board' and 'Candidate Board' (multiple instances).

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Board		Private Dashboards	Hemavathy M.R	6/4/2023, 6:53 pm	
Created by Me	Candidate Board		Private Dashboards	Hemavathy M.R	6/4/2023, 6:45 pm	
Private Dashboards	Candidate Board	candidate marksby stage	Private Dashboards	Hemavathy M.R	6/4/2023, 6:43 pm	
All Dashboards	Candidate Board		Private Dashboards	Hemavathy M.R	6/4/2023, 6:38 pm	
FOLDERS	Candidate Board		Private Dashboards	Hemavathy M.R	4/4/2023, 10:14 pm	
All Folders	Candidate Board		Private Dashboards	Hemavathy M.R	5/4/2023, 9:34 am	
Created by Me	Candidate Board		Private Dashboards	Hemavathy M.R	5/4/2023, 9:26 am	
Shared with Me						
FAVORITES						
All Favorites						



This screenshot shows the 'Candidate Board' dashboard in Salesforce. The dashboard has a title bar with 'Refresh', 'Edit', and 'Subscribe' buttons. Below the title bar, there is a message: 'We can't draw this chart because there is no data.' A link 'View Report (New Candidate Marksby Stages Report)' is provided. The dashboard area is mostly blank, indicating no data is currently displayed.

Trailhead Profile Public URL

Team Leader	https://trailblazer.me/id/h8148519383
Team Member 1	https://trailblazer.me/id/d8122196175
Team Member 2	trailblazer.me/id/ela12
Team Member 3	https://trailblazer.me/id/geetha978980

ADVANTAGES

- It enables the business to take data supplemented decision by evaluating customer behaviour and forecasting purchase intention.
- Collate customer information and organize it into a repository.
- Offer personalized interactions to improve the relationships with customer.

DISADVANTAGES

- It reduces the flexibility in dealing with customer queries.
- Poor communication.
- Lack of leadership.

APPLICATIONS

Tracking customers

A good CRM helps you understand our market and the needs of your customer.

Collecting data for marketing for Marketing

A CRM saves important data in extensive customer and contact lists.

Improving interactions and communication great customer relationships with all your clients and let them know what your products and services can do for them.

Streamlining internal sales processes

A good CRM helps you streamline your internal sales processes so that there is consistency and quality across your sales team.

Planning your operations

A good customer relationship management tool will help you understand your current capacity and the demand customers are likely to have for your products and services.

CONCLUSIONS:

CRM refers to a conceptually broad phenomenon of business activity, and if the phenomenon of cooperation and collaboration with customer.

The CRM has simplified the handling of customers in many in many industries.

Therefore, after few years CRM will be the important and better process for customer management.

FUTURE SCOPE

1. Opportunity for exercising the faculties or abilities; capacity for action.
2. Range of view, perception, or grasp; outlook.
- 3 the area covered by an activity, topic, etc.; range.



THANK YOU