ARIGNAR ANNA GOVERNMENT ARTS COLLEGE- VILLUPURAM.

DEPARTMENT OF STATISTICS

NAAN MUDHALVAN PROJECT

III B.SC.STATISTICS

SHIFT- 1

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDKDATE WITH INTERNAL MARKS

Team leader : LOKESWARAN B

Team member: GURUNATHAN I

Team member: KADIRVEL N

Team member: KALAYARASAN G

Team leader – B. lokeswaran

Smart Internz

Last Login : 2023-04-13 06:50:48

PROFILE

Name : LOKESWARAN B
Email: lokeswaran58@gmail.com
NM_ID: 3132DA56736395DBF1240113
0DA11A64

CATEGORY	: Salesforce Associate
PROJECT TITLE	: Implementing CRM for Result tracking of a candidate with internal marks.
ROCKET CHAT USERNAME	: lokeswaran58@gmail.com
ROCKET CHAT PASSWORD	: ········· 👁

Team member 1- I. Gurunathan

☰ 🔔 0 ⚙

Last Login : 2023-04-13 07:08:11

PROFILE

Name : GURUNATHAN I
Email: Gnathanvpm@gmail.com
NM_ID: DDEA9BB4567633B97894
B754E7CC5E63

CATEGORY	: Salesforce Associate
PROJECT TITLE	: Implementing CRM for Result tracking of a candidate with i nternal marks.
ROCKET CHAT USERNAME	: Gnathanvpm@gmail.com
ROCKET CHAT PASSWORD	: ········ 👁

DOWNLOAD ROCKET CHAT : GET IT ON

Tema member 2- N. Kadirvel

Last Login : 2023-04-13 06:56:09

PROFILE

Name : KADIRVEL N
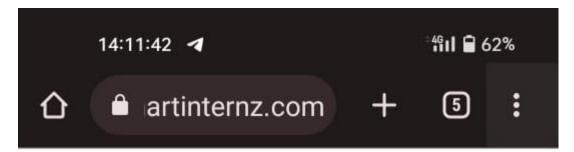**Email:** kadirvel17062002@gmail.com
NM_ID: 325CB7D3A0A5E60B8DC4490
1D5EA3575

CATEGORY	:	Salesforce Associate
PROJECT TITLE	:	Implementing CRM for Result tracking of a candidate with in ternal marks

Team member 3- G Kalayarasan

14:11:42

artinternz.com

≡

Last Login : 2023-03-08 02:11:37

PROFILE

Name : KALAYARASAN G
Email: anbarasanvallarasu@gmail.com
NM_ID: 3C5839A2F3B26E7B7A54B85C7933C3C0

CATEGORY   Salesforce Associate

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

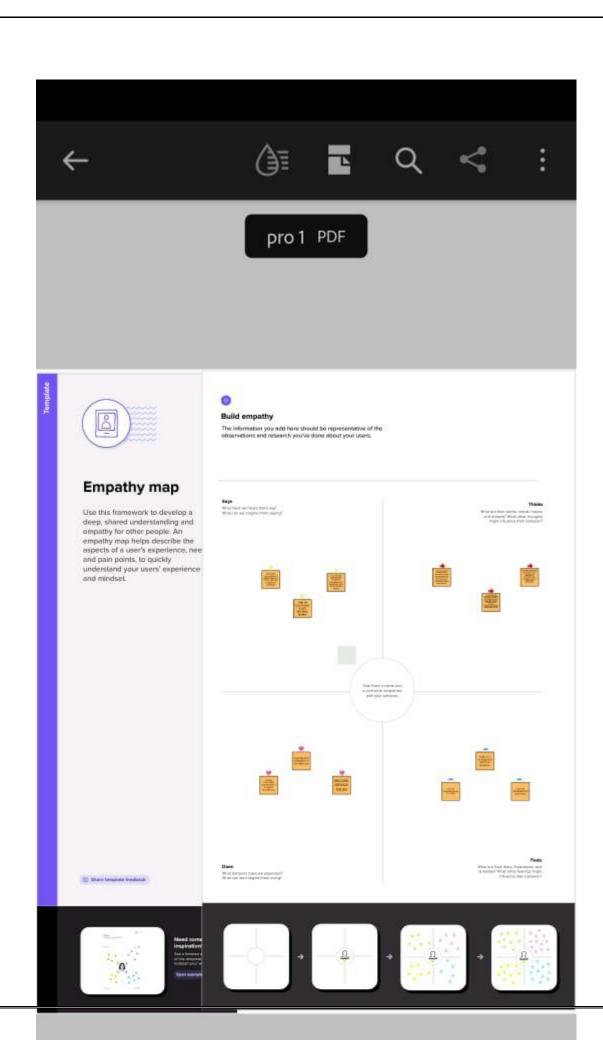## 1 INTRODUCTION

1.1 Overview

Administrator should be able to create all base data including Semester, Candidate, Course 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 Internal Results, Re-evaluation Can be initialized by Candidate for all Internal Results. Now only dean can update the marks after re-evaluation.

1.2 PURPOSE

CRM implementation is the process of introducing a CRM system to your business. It starts from choosing the right solution for your needs, and ends with actively using it to streamline your business processes. However, maybe that's an overly-simplified account; implementation is a multi-stage process…

1. Identifying a problem that CRM solves
2. Searching for an appropriate CRM system for your business
3. Finding appropriate systems and testing it
4. Subscribing or buying the appropriate CRM platform

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map

Template

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, need and pain points, to quickly understand your users' experience and mindset.

Build empathy

The information you add here should be representative of the observations and research you've done about your users.

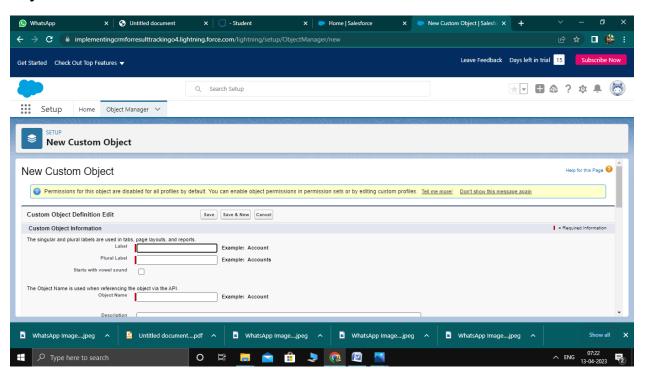## 2.2 Ideation & Brainstorming Map

3   RESULT

3.1 Data modal:

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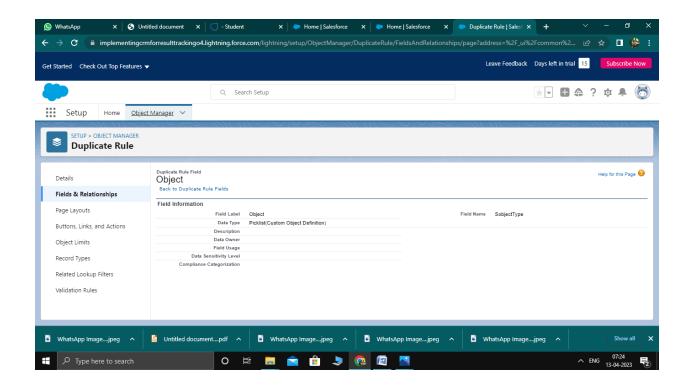
Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

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.

Obj1

Obj 2

3.2 Activity & screenshot

Create 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.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. 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.

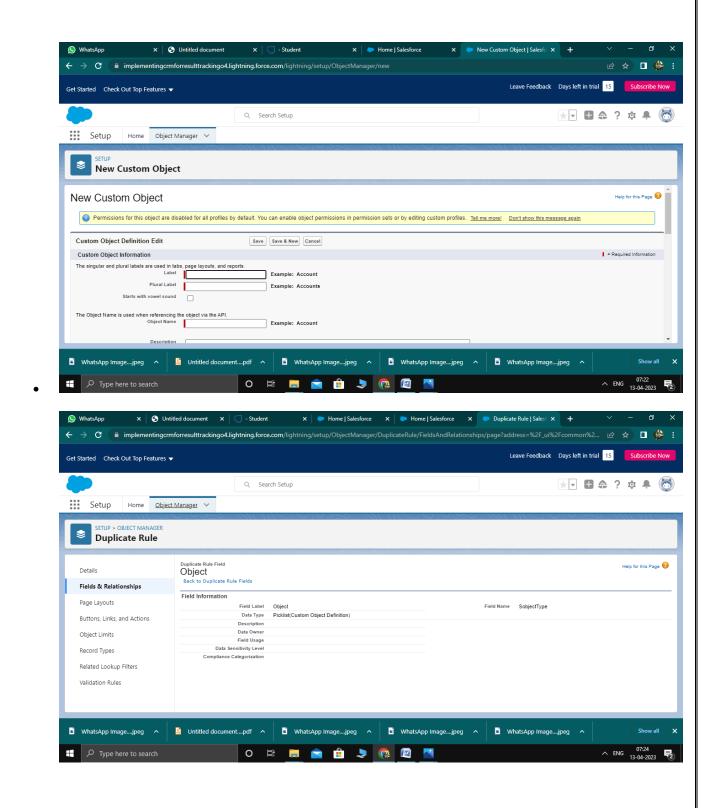**Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select**

- 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.

To Navigate to Setup page:

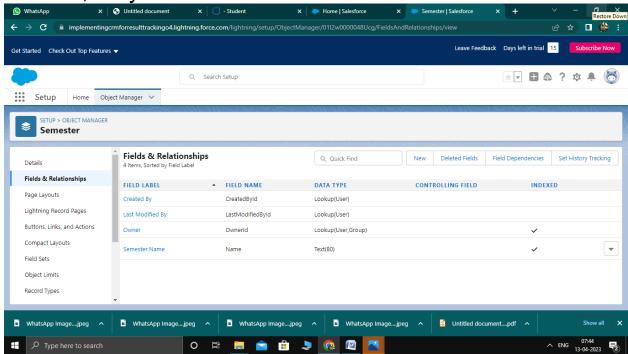- Click on gear icon then click setup.

To create an object:

- From the setup page then Click on Object Manager then Click on Create then Click on Custom
- Object.
- On Custom object defining page:

- Enter the label name, plural label name, click on Allow reports, Allow search then Save.

Fields And Relationship

An object relationship in Salesforce is a two-way association between two objects.
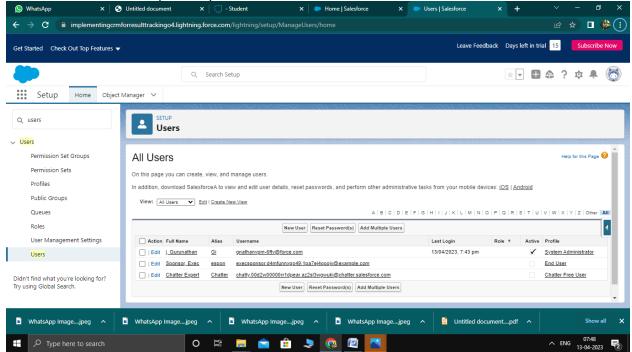
Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

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 Licence 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 a temporary password emailed to your email.
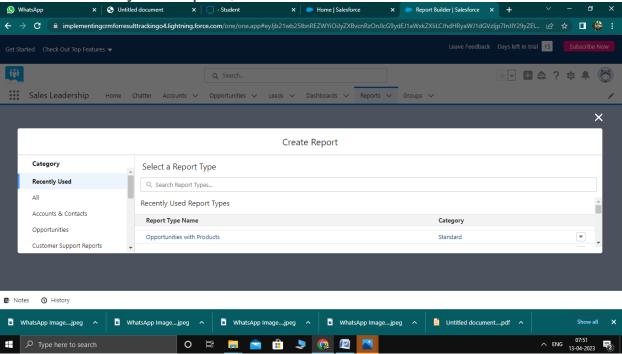
Reports And Dashboards

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. Customize your report, then save or run it.

To create a report:

a. Go to the app and click on the reports tab

b. Click New Report

c. Select report type from category or from report type panel or from search panel then click on
start report.

d. Customize your report, then save or run it.

Create A Dashboard

1. Click the Dashboards tab.

2. Click New Dashboard.

3. Name your dashboard Candidate Board . Leave all other fields as is and click Create.

4. Click + Component.

5. For Report, select Candidate Marks by Stage. Click Select. ...

6. For Display As, select Vertical Bar Chart and click Add.

7. Click Save.

8. Click Done

4 Trailhead profile public URL

Team lead-https://trailblazer.me/id/lwaran14
Team Member 1-https://trailblazer.me/id/gurui1
Team Member 2-https://trailblazer.me/id/nkadirvel2002
Team Member 3-https://trailblazer.me/id/kraji23

5 ADVANTAGES & DISADVANTAGES

Pros

- **It allows for the consolidation of customer data and the basis for deep insights.**

  - **It speeds up the sales conversion process.**

  - **It increases staff productivity, lowering time-cost.**

- **It allows geographically dispersed teams to collaborate effectively.**

- **Improves customer experience by allowing personalisation and improved query resolution.**

Cons

- Customer experience may worsen due to staff over-reliance on the system.

  - Security and data protection issues with centralised data.

    - The excess initial time and productivity cost at the implementation.

      - Requires a process-driven sales organisation.

        - CRM may not suit all businesses.

6 APPLICATIONS

Administrator should be able to create all base data including Semester, Candidate, Course 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 Internal Results, Re-evaluation Can be initialized by Candidate for all Internal Results. Now only dean can update the marks after re-evaluation

7 CONCLUSION

ConclusionCustomer 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 produc

8 FUTURE SCOPE

These days, numerous small and medium-sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement CRM software. However, the preferences and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.