

1 INTRODUCTION

Overview: Implementing a Customer Relationship Management (CRM) system for result tracking of a candidate with internal marks would involve creating a database to store and manage the candidate's academic records. The CRM system would need to be customized to fit the needs of an educational institution and would involve integrating with the institution's existing student information systems.

The system would need to track the candidate's internal marks for various subjects, as well as any assignments or projects completed. It could also include information about the candidate's attendance, performance in extracurricular activities, and other relevant information.

The system would allow teachers and administrators to view the candidate's progress over time and identify areas where they need additional support. It would also enable communication between teachers, candidates, and parents, providing updates on the candidate's performance, attendance, and any issues that need to be addressed.

In addition to tracking the candidate's academic performance, the CRM system could also be used to manage other aspects of the candidate's experience, such as scheduling exams and meetings, tracking financial information, and managing other administrative tasks.

Overall, implementing a CRM system for result tracking of a candidate with internal marks can help educational institutions streamline their processes and provide more personalized support to candidates. It can also help candidates take more ownership of their academic progress and provide them with the tools they need to succeed.

Purpose: Efficient tracking: The CRM system can provide an efficient and streamlined way of tracking the results of candidates. It can help to eliminate the need for manual tracking and reduce errors, as all information can be stored in a centralized database.

Improved communication: The CRM system can enable better communication between the candidate, the academic institution,

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and other stakeholders involved in the result tracking process. This can help to ensure that everyone is on the same page and that any issues are addressed promptly.

Personalization: A CRM system can provide a personalized experience for each candidate, allowing them to view their own results and progress. This can help to increase engagement and motivation, as candidates can see how they are performing and identify areas for improvement.

Analytics and reporting: The CRM system can provide valuable analytics and reporting on candidate performance, allowing academic institutions to identify trends and make data-driven decisions. This can help to improve the overall quality of education and ensure that candidates are receiving the support they need.

2 Problem Definition & Design Thinking

Empathy Map

Ideation & Brainstorming Map

RESULT

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Data Model:

| Object name | Fields in the object | |
|------------------|--------------------------|-----------|
| | Field label | Data type |
| Semester | Semester Name | Text |
| | Course(lookup) | Text |
| Candiadate | Candidate Name | Text |
| | Candidate Id | Text |
| | Semester Name | Text |
| | Internal results(lookup) | Text |
| Course Detais | Course Name | Text |
| | Course ID | Text |
| Lecturer Details | Lecturer Role | Text |
| | Lecturer Name | Text |
| | Course ID | Text |
| | Course(lookup) | Text |
| Internal results | Candidate ID | Text |
| | Course ID | Text |
| | Marks | Text |

Milestone 1:Creation Salesforce Org:

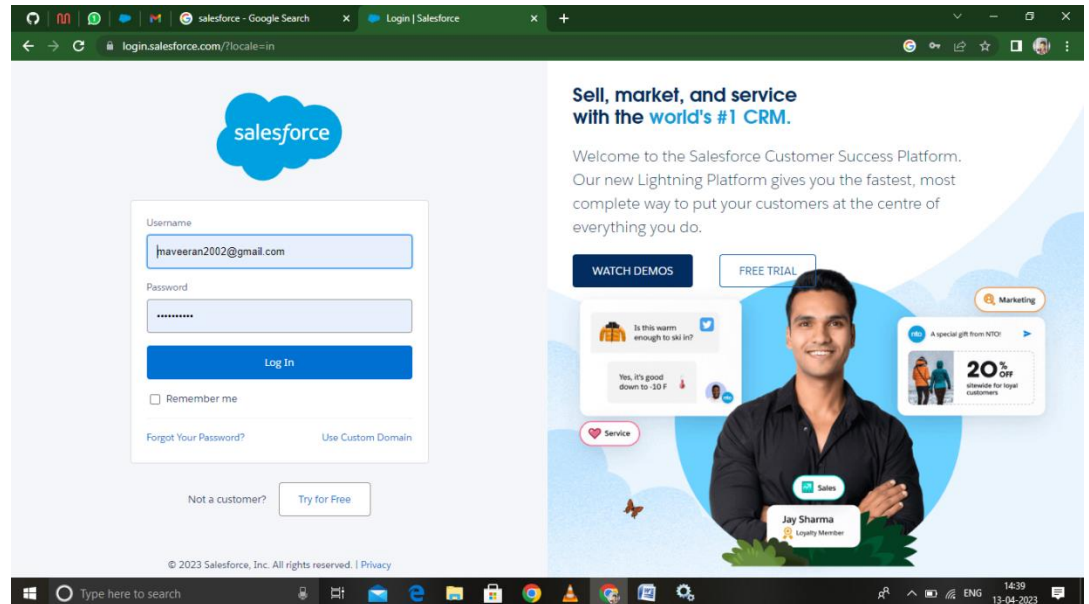
Activity & Screenshot

Activity 1: Creating Developer Account Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
 2. Click on sign up.
 3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer
 - c. Company : College Name
 - d. County : India
 - e. Postal Code : pin code
 - f. Username : should be a combination of your name and company
- This need not be an actual email id, you can give anything in the

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format : username@organization.com



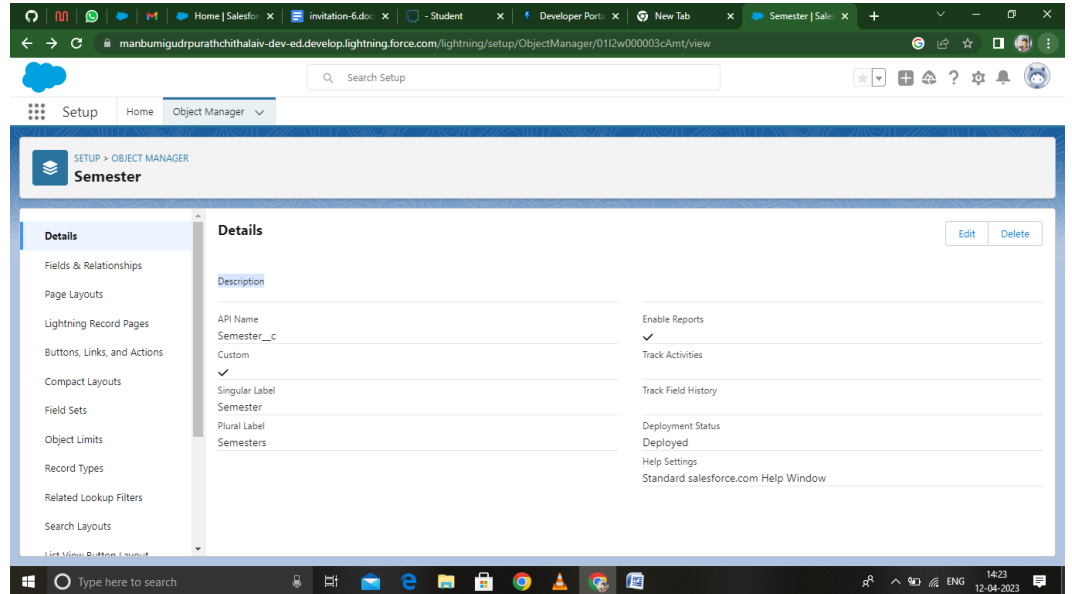
Milestone-2:Object

Activity-1: To 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.

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

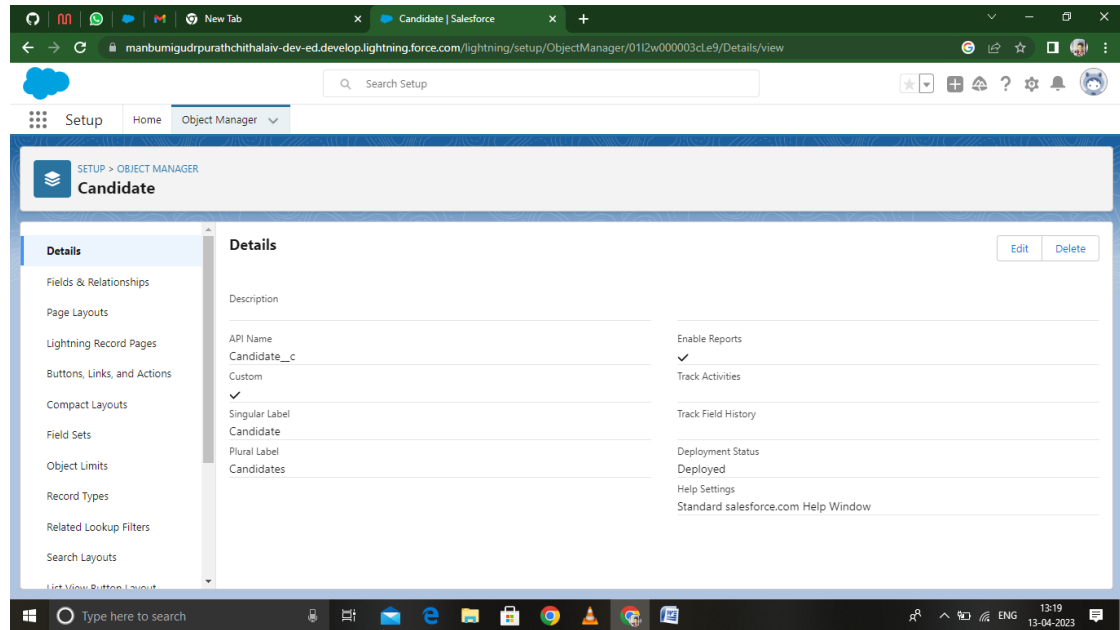
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- Leave all defaults as is. Click Next, Next, and Save.



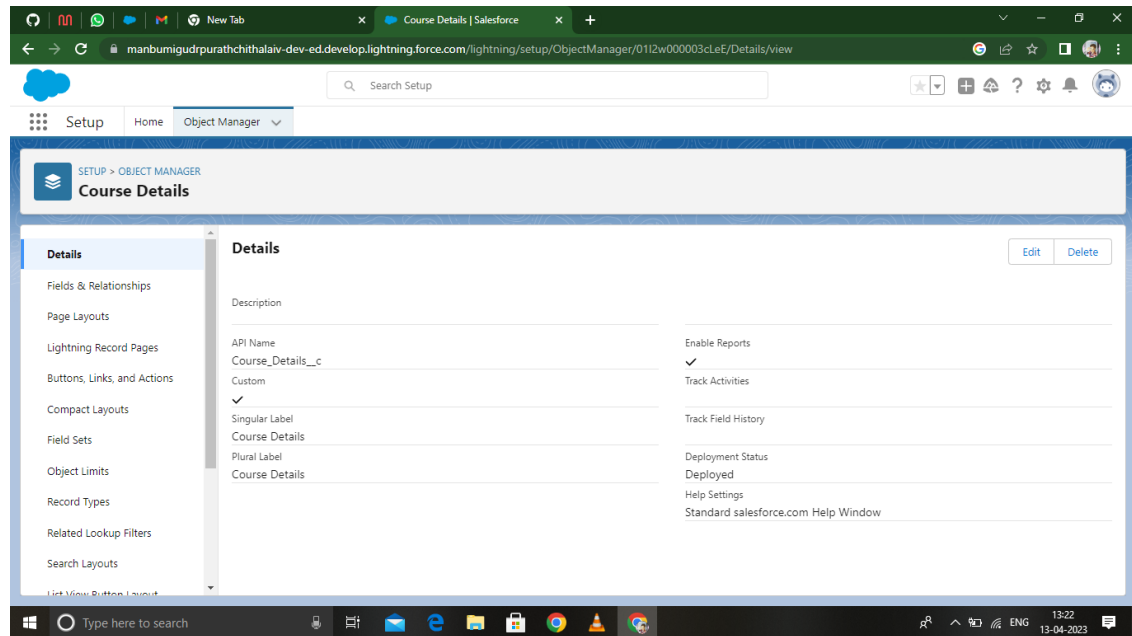
Activity-2: Follow Similar steps to create Candidate ,Course Details, Lecturer Details ,Internal results Objects.

Candidate:



Course Details:

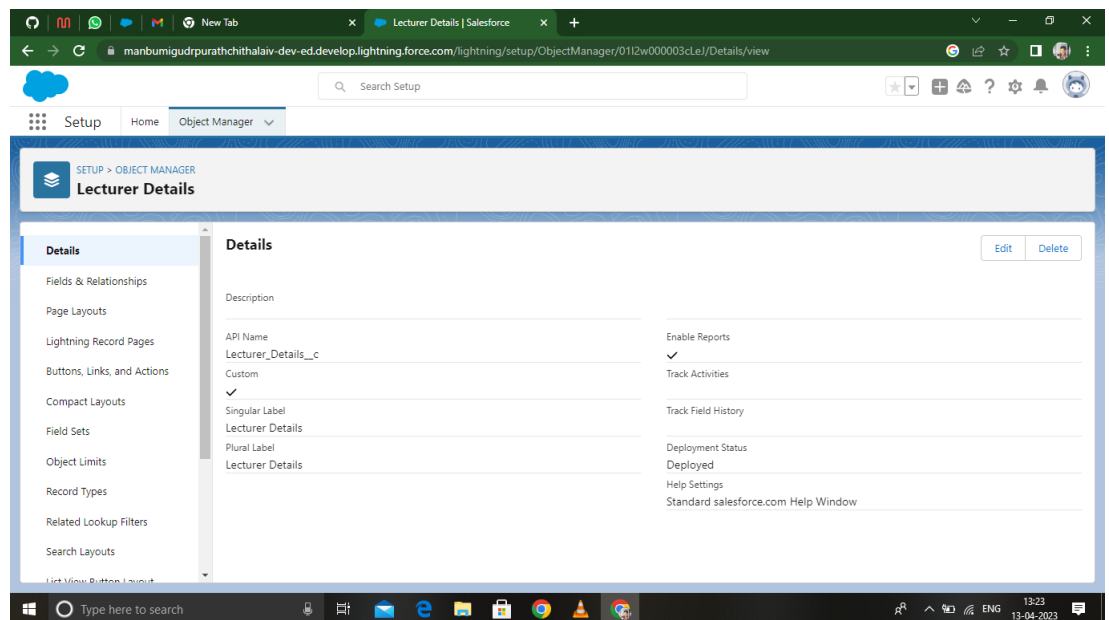
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The screenshot shows the Salesforce Setup interface for a custom object named 'Course Details'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Course Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following fields:

| Field Name | Value |
|---------------------|-------------------------------------|
| Description | |
| API Name | Course_Details__c |
| Custom | <input checked="" type="checkbox"/> |
| Singular Label | Course Details |
| Plural Label | Course Details |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input checked="" type="checkbox"/> |
| Track Field History | <input checked="" type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

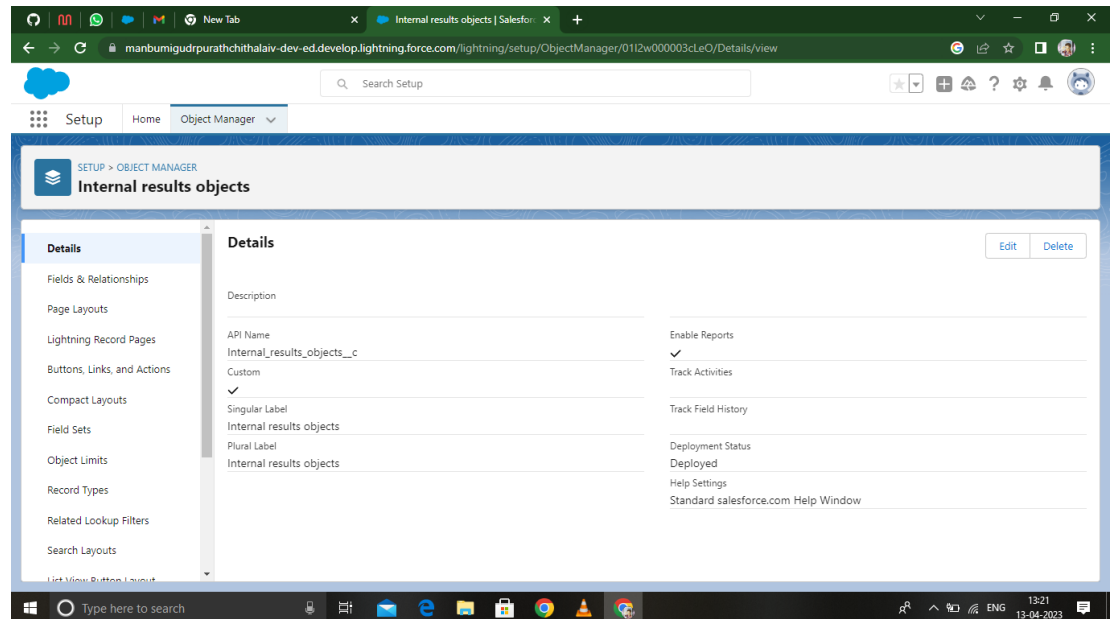
Lecturer Details:



The screenshot shows the Salesforce Setup interface for a custom object named 'Lecturer Details'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Lecturer Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following fields:

| Field Name | Value |
|---------------------|-------------------------------------|
| Description | |
| API Name | Lecturer_Details__c |
| Custom | <input checked="" type="checkbox"/> |
| Singular Label | Lecturer Details |
| Plural Label | Lecturer Details |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input checked="" type="checkbox"/> |
| Track Field History | <input checked="" type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

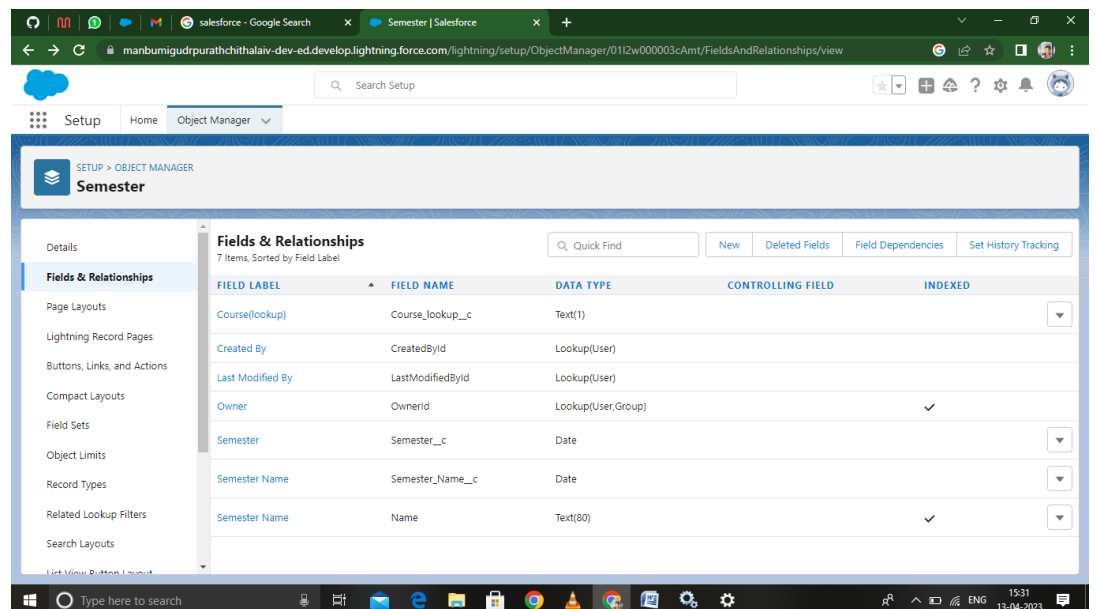
Internal result:



Milestone -2:Fields and Relationship

Activity-1: Creation of fields:

- Click the gear icon and select Setup. This launches Setup in a new tab.
 - Click the Object Manager tab next to Home.
 - Select Semester.
 - Select Fields & Relationships from the left navigation, and click New
- Now ready to make a custom field. Let's do this!
- Select the Text as the Data Type, then click Next.
 - For Field Label, Enter Semester Name.
 - Click Next, Next, then Save

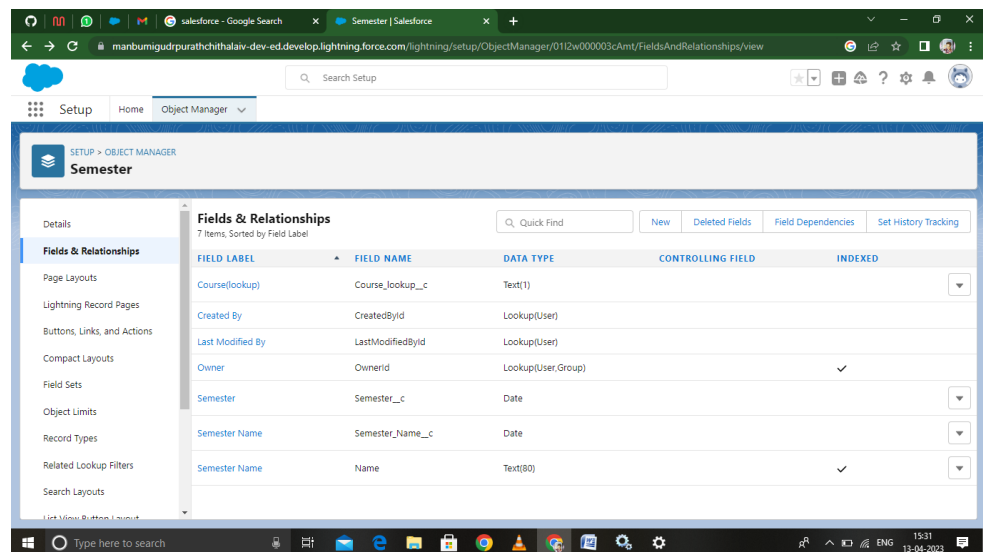


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Activity-2: Similarly Create Following Fields according to the objects.

| Semester: | Candidate: | Course Details: | Lecturer Details: | Internal results |
|----------------|--------------------------|-----------------|-------------------|------------------|
| Semester Name | Candidate Name | Course Name | Lecturer Role | Candidate ID |
| Course(lookup) | Candidate Id | Course ID | Lecturer Name | Course ID |
| | Semester Name | | Course ID | Marks |
| | Internal results(lookup) | | Course(lookup) | |

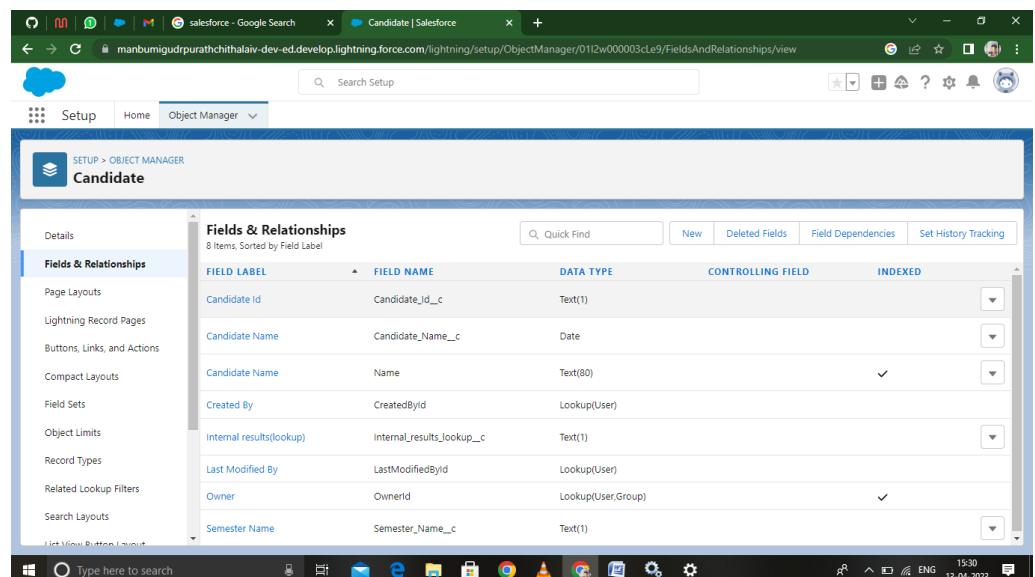
Semester:



The screenshot shows the Salesforce Setup interface for the 'Semester' object. The 'Fields & Relationships' section is active, displaying a list of 7 fields sorted by label. The fields are:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Course(lookup) | Course_lookup__c | Text(1) | | |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User.Group) | | ✓ |
| Semester | Semester__c | Date | | |
| Semester Name | Semester_Name__c | Date | | |
| Semester Name | Name | Text(80) | | ✓ |

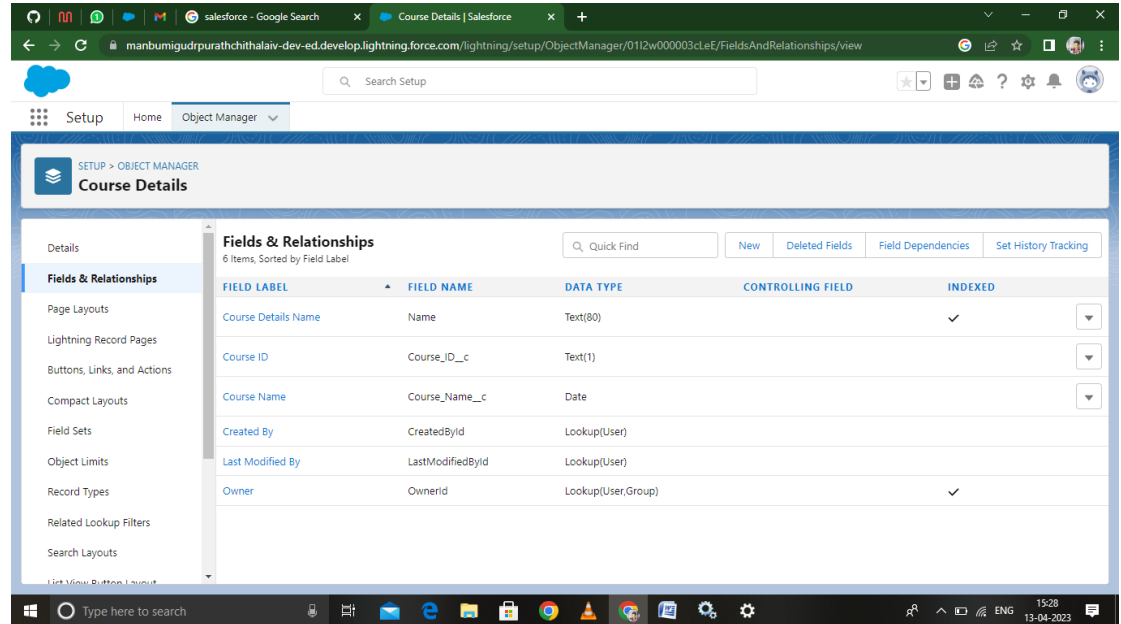
Candidate:



The screenshot shows the Salesforce Setup interface for the 'Candidate' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields sorted by label. The fields are:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|--------------------------|----------------------------|--------------------|-------------------|---------|
| Candidate Id | Candidate_id__c | Text(1) | | |
| Candidate Name | Candidate_Name__c | Date | | |
| Candidate Name | Name | Text(80) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Internal results(lookup) | Internal_results_lookup__c | Text(1) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User.Group) | | ✓ |
| Semester Name | Semester_Name__c | Text(1) | | |

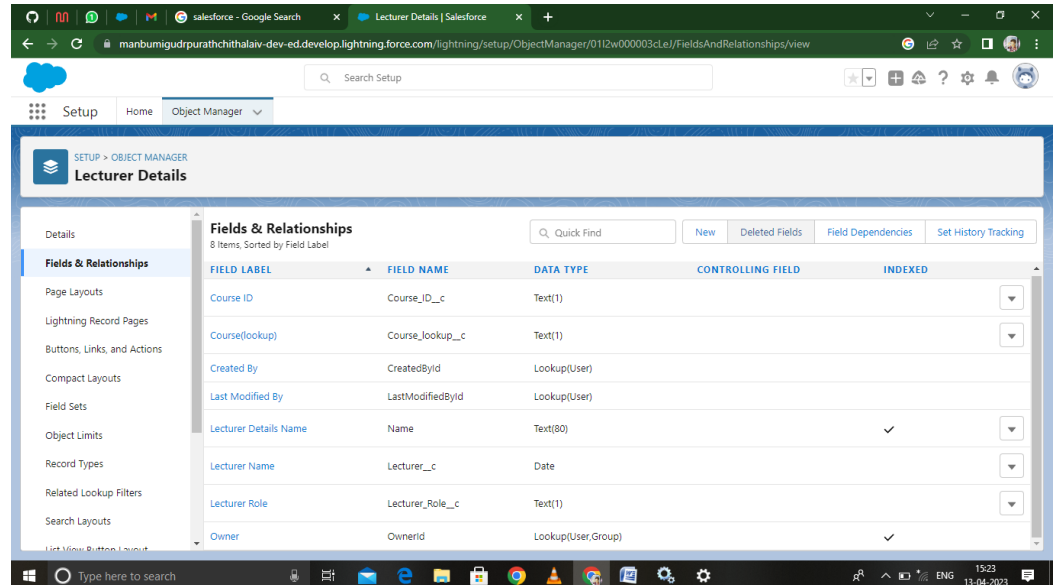
Course Details:



The screenshot shows the Salesforce 'Course Details' page under the 'Object Manager' tab. The page displays a table of fields and relationships for the 'Course' object. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Course Details Name, Course ID, Course Name, Created By, Last Modified By, and Owner.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------|------------------|--------------------|-------------------|---------|
| Course Details Name | Name | Text(80) | | ✓ |
| Course ID | Course_ID__c | Text(1) | | |
| Course Name | Course_Name__c | Date | | |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |

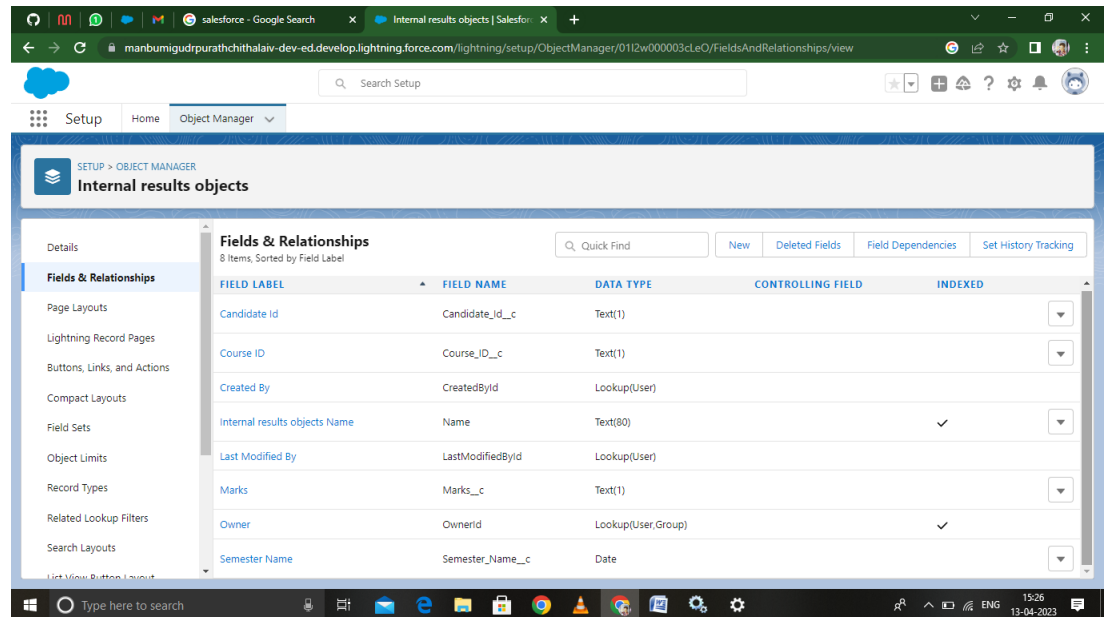
Lecturer Details:



The screenshot shows the Salesforce 'Lecturer Details' page under the 'Object Manager' tab. The page displays a table of fields and relationships for the 'Lecturer' object. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Course ID, Course(lookup), Created By, Last Modified By, Lecturer Details Name, Lecturer Name, Lecturer Role, and Owner.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-----------------------|------------------|--------------------|-------------------|---------|
| Course ID | Course_ID__c | Text(1) | | |
| Course(lookup) | Course_lookup__c | Text(1) | | |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Lecturer Details Name | Name | Text(80) | | ✓ |
| Lecturer Name | Lecturer__c | Date | | |
| Lecturer Role | Lecturer_Role__c | Text(1) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |

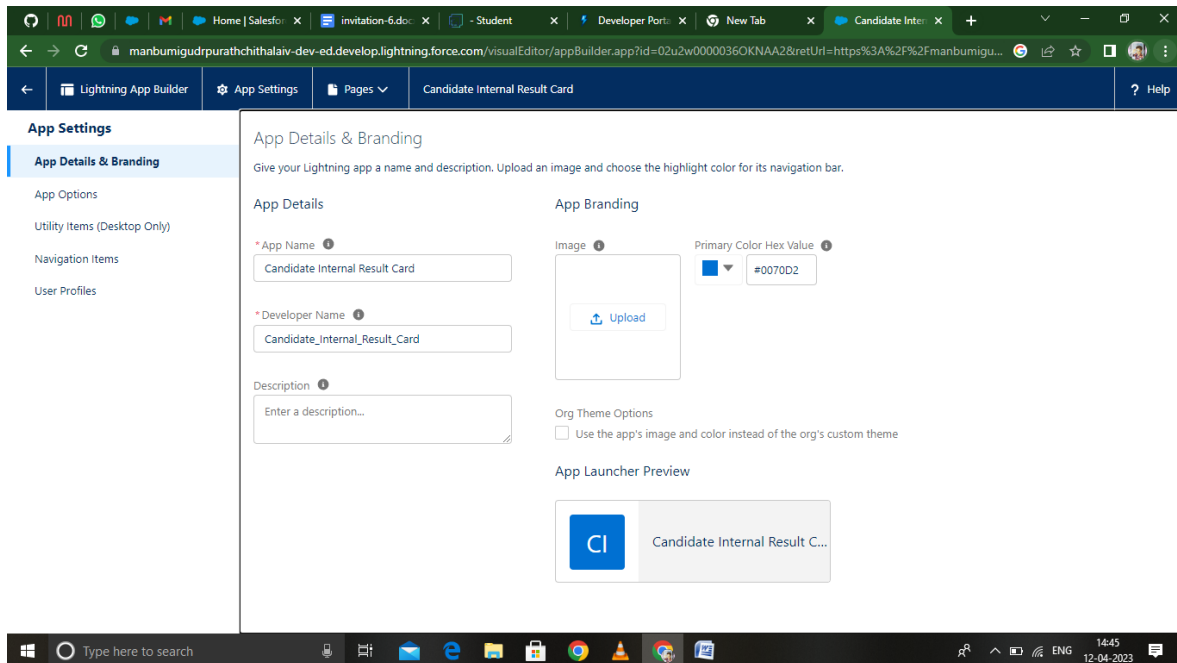
Internal results:



Milestone-3: Lightning App

Activity-1: Create the Candidate Internal Result Card app:

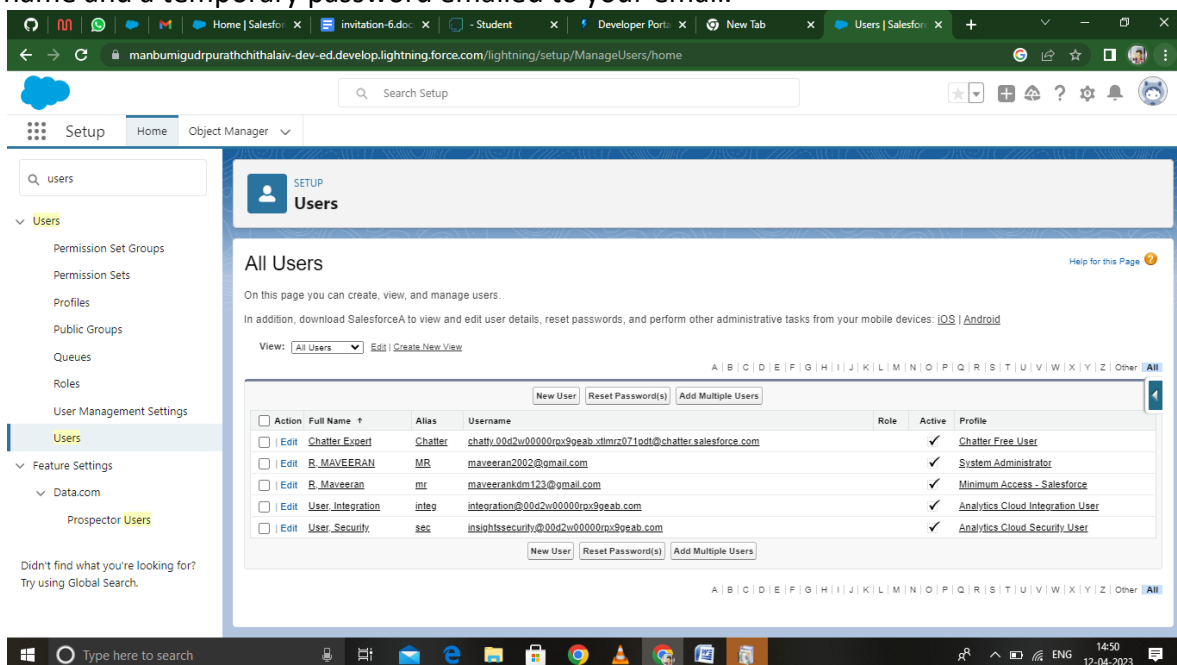
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Candidate Internal Result Card as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Semester, Candidate, Course Details, Lecturer Details, Internal Results and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.



Milestone-4: Users

Activity 1: Creating a Users:

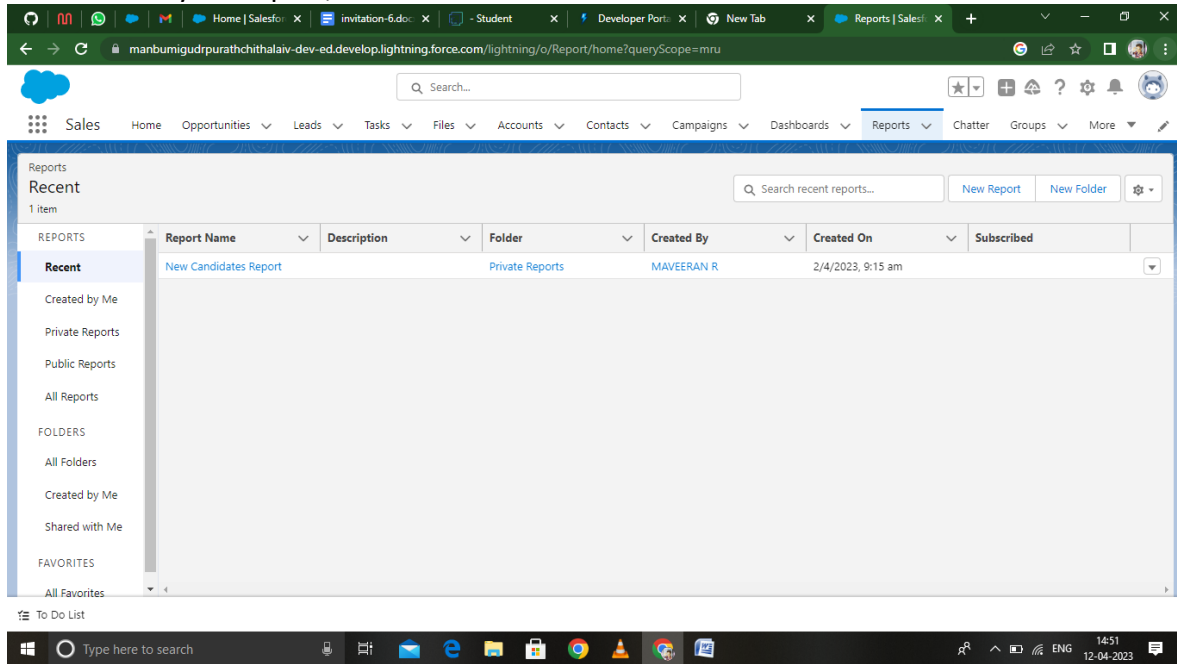
1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Martin and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(none)
5. Select 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.



Milestone-5: Reports

Activity 1: Reports and dashboards:

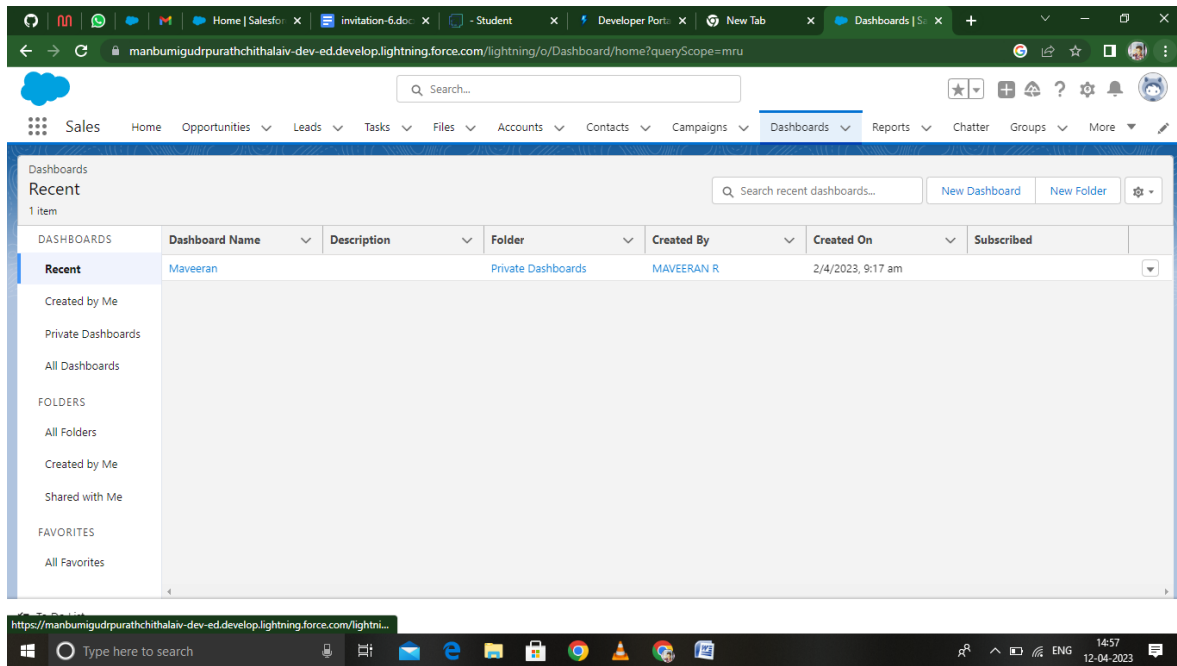
1. From the Reports tab, click New Report.
2. Select the report type as Candidate with candidate Marks for the report, and click Create.
3. Customise your report, then save or run it.



Milestone-6:Dashboards:

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 Marksby 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/hgahlot3>

Team Member 1- <https://trailblazer.me/id/mkalaivanan>

Team Member 2 - <https://trailblazer.me/id/nandl9>

Team Member 3 – <https://trailblazer.me/id/nnarayanan23>

5 **ADVANTAGES & DISADVANTAGE**

Advantages: Implementing a CRM (Customer Relationship Management) system for tracking the results of candidates with internal marks can provide several advantages, including:

Efficient tracking of candidate results: A CRM system can help track candidate results more efficiently, reducing manual effort and errors in the process. The system can store all the information about the candidate's performance in one place, making it easier for administrators to access the information and make decisions.

Improved candidate engagement: A CRM system can help improve candidate engagement by providing timely updates on their performance and progress. This can help candidates stay motivated and engaged in the process, leading to better results.

Personalized communication: With a CRM system, administrators can send personalized messages to candidates based on their performance and needs. This can help build a more personalized relationship with the candidate, leading to better engagement and trust.

Data analytics: A CRM system can provide valuable insights into candidate performance and behavior. This can help administrators identify trends, patterns, and areas for improvement, leading to better decision-making.

Improved collaboration: A CRM system can improve collaboration among administrators, faculty, and staff involved in the candidate tracking process. This can lead to better communication, streamlined processes, and improved results.

Enhanced communication: With a CRM system, administrators can communicate with candidates through multiple channels, including email, phone, and social media. This can help ensure that candidates receive timely updates and stay engaged in the process.

Scalability: A CRM system can be easily scaled to accommodate a large number of candidates and staff, making it an ideal solution for educational institutions of all sizes.

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Overall, implementing a CRM system for candidate result tracking can provide significant advantages for educational institutions, including improved efficiency, candidate engagement, data analytics, and collaboration.

Disadvantages:

Cost: Implementing a CRM system can be expensive, especially for smaller organizations with limited budgets.

Complexity: Implementing a CRM system can be complex, requiring significant planning, configuration, and customization to meet the specific needs of the organization.

Integration: Integrating a CRM system with existing systems and software can be difficult and time-consuming, requiring significant IT resources.

Training: Implementing a new system requires training for all users, which can be time-consuming and costly.

Resistance to change: Employees may be resistant to using a new system, leading to low adoption rates and reduced productivity.

Security: A CRM system may contain sensitive data about candidates and employees, making security a concern.

Maintenance: Maintaining a CRM system requires ongoing updates, upgrades, and troubleshooting, which can be time-consuming and costly.

Data quality: A CRM system is only as good as the data entered into it, and poor data quality can lead to inaccurate reporting and decision-making.

Scalability: As an organization grows, its CRM system may need to be scaled up to accommodate more users and data, which can be challenging.

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Customization: Customizing a CRM system to meet specific needs can be time-consuming and require specialized expertise.

6 APPLICATIONS

Implementing CRM (Customer Relationship Management) can be applied in various areas, including tracking the results of a candidate with internal marks. Here are some potential ways to apply CRM in this scenario:

Candidate data management: A CRM system can be used to store and manage all candidate data, including their internal marks, past academic records, and other relevant information. This data can be easily accessed by authorized personnel, making it easier to track candidate performance and progress.

Result tracking: The CRM system can also be used to track and monitor candidate results over time. This can include analyzing trends, identifying areas where candidates are struggling, and providing personalized support and guidance to help them improve their performance.

Communication and engagement: A CRM system can be used to communicate with candidates regularly, providing them with updates on their results, upcoming exams, and other important information. This can help to build a stronger relationship with candidates, keeping them engaged and motivated to achieve their academic goals.

Performance analysis: The CRM system can be used to analyze candidate performance across multiple subjects and over time. This can help identify patterns and trends in performance, allowing for targeted interventions and support to be provided where needed.

Reporting and analytics: Finally, a CRM system can be used to generate reports and analytics on candidate performance, providing valuable insights into the effectiveness of different interventions and strategies. This information can be used to improve the overall quality of teaching and learning, leading to better results for all candidates.

7 CONCLUSION

The implementation of a CRM system for result tracking of a candidate with internal marks can provide numerous benefits for educational institutions. The system can automate and streamline the process of

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recording, storing, and analyzing student data, making it easier for administrators and educators to access and utilize this information.

Through the use of a CRM system, educational institutions can track student progress, identify areas for improvement, and provide personalized support to students. The system can also help institutions to more effectively communicate with students and their parents, providing real-time updates on academic progress and performance.

The implementation of a CRM system can also have significant benefits for students, providing them with a more personalized and effective learning experience. By tracking student progress and identifying areas for improvement, educators can provide targeted support to help students succeed.

Overall, the implementation of a CRM system for result tracking of a candidate with internal marks can have a transformative impact on educational institutions, providing a more efficient, effective, and personalized approach to student learning and academic support.

8 FUTURE SCOPE

Implementing a CRM (Customer Relationship Management) system for tracking the results of a candidate with internal marks can be beneficial for educational institutions or organizations. Here are some possible enhancements that can be made in the future to improve the effectiveness of such a system:

Integration with external data sources: The CRM system can be integrated with external data sources such as online learning platforms or student information systems to automatically update the candidate's progress and results. This can save time and reduce errors associated with manual data entry.

Advanced reporting and analytics: The CRM system can be equipped with advanced reporting and analytics features to help educators and administrators track the performance of candidates over time. These features can include data visualizations, predictive analytics, and data segmentation to provide insights into candidate behavior and outcomes.

Personalization and customization: The CRM system can be

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customized to meet the unique needs of different educational institutions or organizations. This can include personalized.