

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

INTRODUCTION:

OVER VIEW:

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.

PURPOSE:

Salesforce is a Customer Relationship Management Platform. CRM is very easy and simple to the lot any kind of user even without computer knowledge. We are complete our data process and follow up within an hour.

PROBLEM DEFINITION AND DESIGN THINKING

EMPATHY MAP



Build empathy

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

Says

What have we heard them say?
What can we imagine them saying?

Salesforce is a
Customer
Relationship
Management
Platform

CRM can serve as
the messaging
and notification
hub for student
contact
management

CRM is very easy
and simple to use
for any kind of
user even without
any computer
knowledge

Implementing
CRM for result
tracking
replace manual
process



Give them a name and
a portrait to empathize
with your persona.

Thinks

What are their wants, needs, hopes,
and dreams? What other thoughts
might influence their behavior?

Implementing
CRM for
resulting
tracking
eliminate data
silos

Create
transparency
across
departments

These features
allow staff to focus
on more significant
communication and
link

CRM system is
capable of
showing an
exact number of
male and female
students



We are
complete our
data process
and follow up
within an hour

CRM system's
provide real time
numbers, data
and graphs that
may be useful in
decision making



Unorganized
user training
which
troubles user
adoption



CRM system can
help educational
organisation in
increasing
revenue

CRM enables you
to do this and
much and much
more right at your
fingertips on a
single platform

Unorganized
use training
which
troubles user
adoption

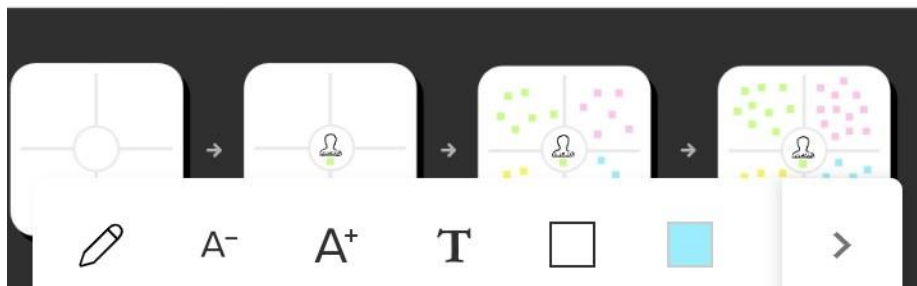
No provision
for offline
connectivity

Does

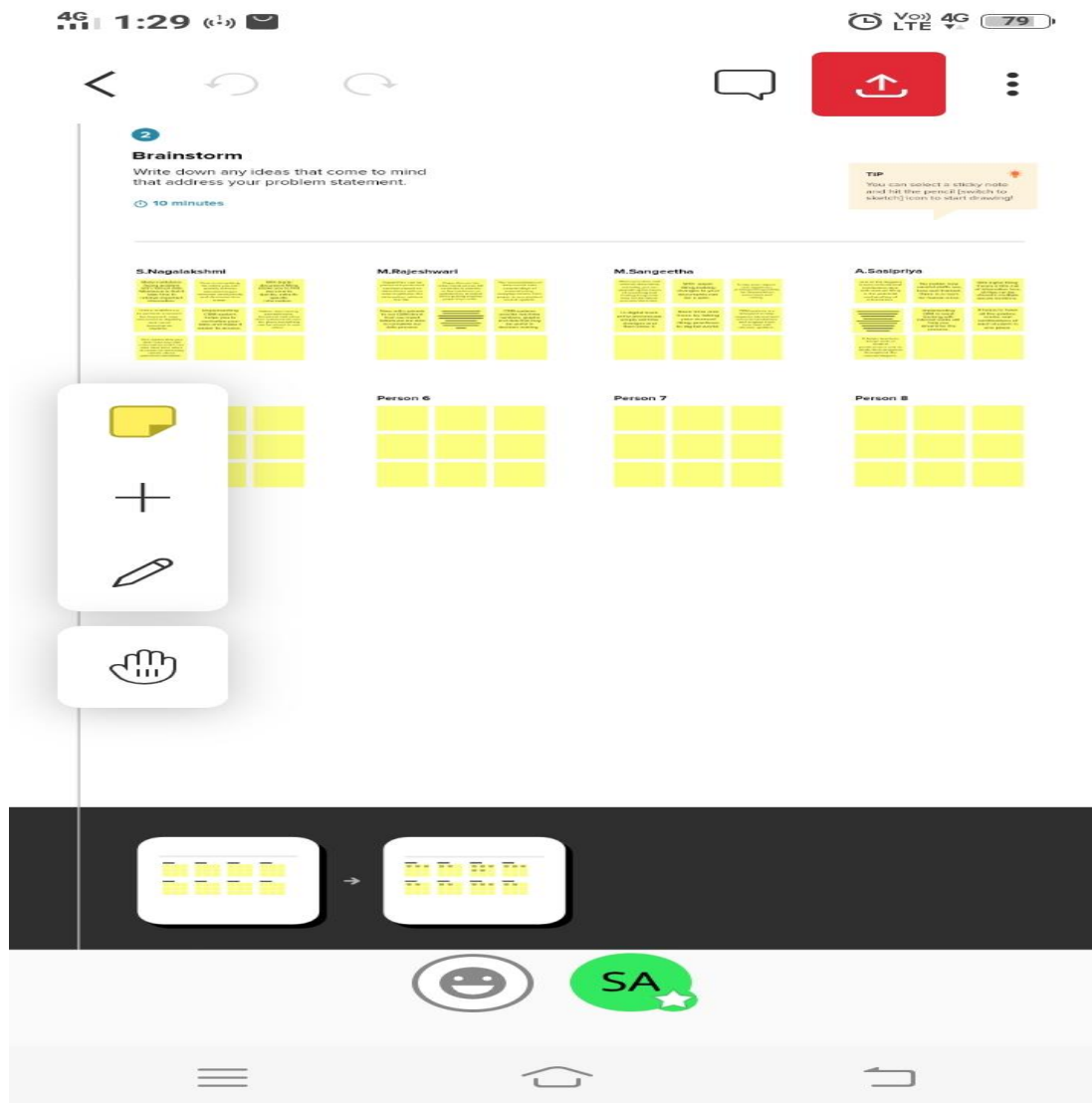
What behavior have we observed?
What can we imagine them doing?

Feels

What are their fears, frustrations, and
anxieties? What other feelings might
influence their behavior?



IDEATION AND BRAINSTORMING MAP



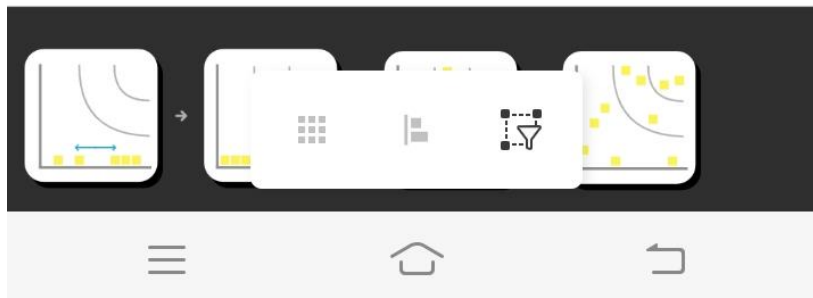
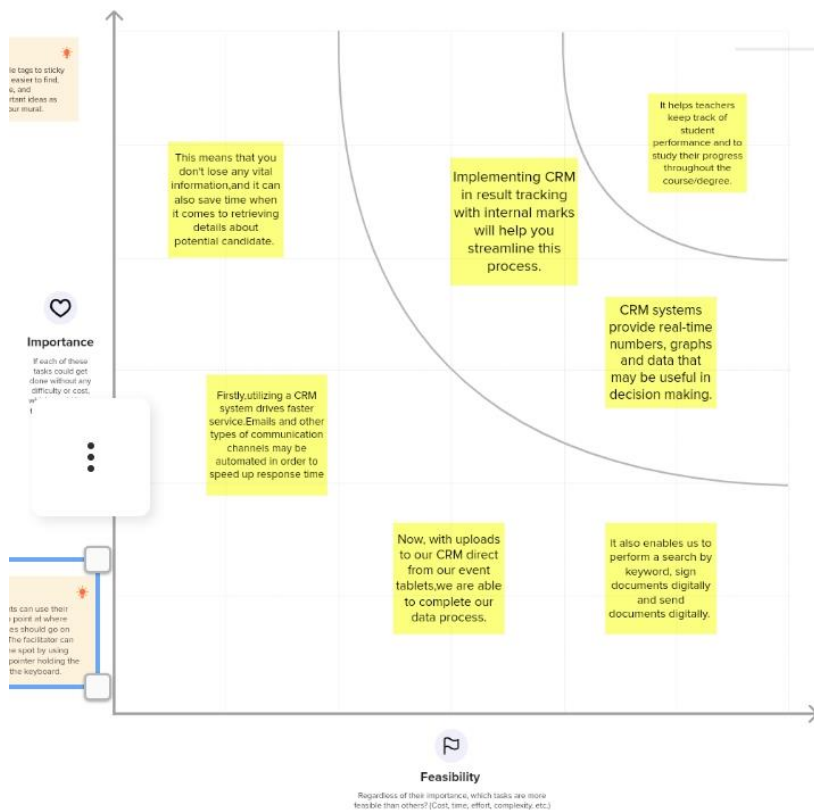


4

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.

20 minutes





Brainstorm

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

🕒 10 minutes



.Nagalakshmi

Many institutions are facing problem with manual data Maintenance is that it takes time to retrieve important information.

Time is everything. So when you can quickly retrieve documents, you increase productivity and decrease time waste.

With digital document filling allows you to find documents quickly, extracts specific information.

It also enables us to perform a search by keyword, sign documents digitally and send documents digitally.

Implementing CRM system helps you to centralize your data and make it easier to access.

Rather than having spreadsheets, document and other files scattered all over the place, everything can be stored in one place.

This means that you don't lose any vital information, and it can also save time when it comes to retrieving details about potential candidate.





You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!



A.Sasipriya

one of the biggest issues educational institutions face with manual filling is the potential mishandling of information

No matter how careful staffs are, how well trained, there is a room for human error.

With digital filling, there's a little risk of information loss, all files can be stored in multiple secure locations.

Educational institutions deals with lots of test paper and student evaluation. It is a painstaking process for teachers to evaluate and keep track of student test and assessment

Implementing CRM in result tracking with internal marks will help you streamline this process.

It helps to have all the grades, marks and certifications of each student in one place

It helps teachers keep track of student performance and to study their progress throughout the course/degree.



Person 8



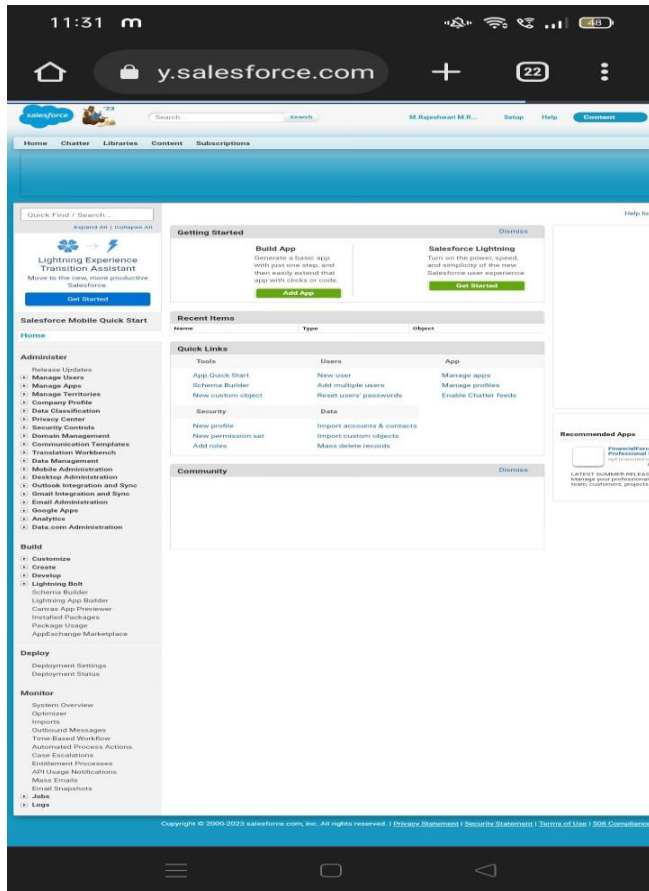
RESULT

OBJECT NAME	FIELDS IN THE OBJECT
SEMESTER	<p>FIELD LABEL:</p> <p>SEMESTER NAME COUSE(LOOKUP)</p> <p>DATA TYPE:</p> <p>TEXT</p>
CANDIDATE	<p>FIELD LABEL:</p> <p>CANDIDATE NAME CANDIDATE ID SEMESTER NAME INTERNAL RESULTS(LOOKUP)</p> <p>DATA TYPE:</p> <p>TEXT</p>
COURSE DETAILS	<p>FIELD LABEL:</p> <p>COURSE NAME COURSE ID</p> <p>DATA TYPE:</p> <p>TEXT</p>

LECTURER DETAILS	FIELD LABEL: LECTURER ROLE LECTURER NAME COURSE ID COURSE(LOOKUP) DATA TYPE: TEXT
INTERNAL RESULTS	FIELD LABEL: CANDIDATE ID COURSE ID MARKS DATA TYPE: TEXT

ACTIVITY AND SCREENSHOT

CREATION SALESFORCE ORG



We are create an developer account for salesforce account. Salesforce is your customer success platform.

Our mail id and name are applied we get developer account.

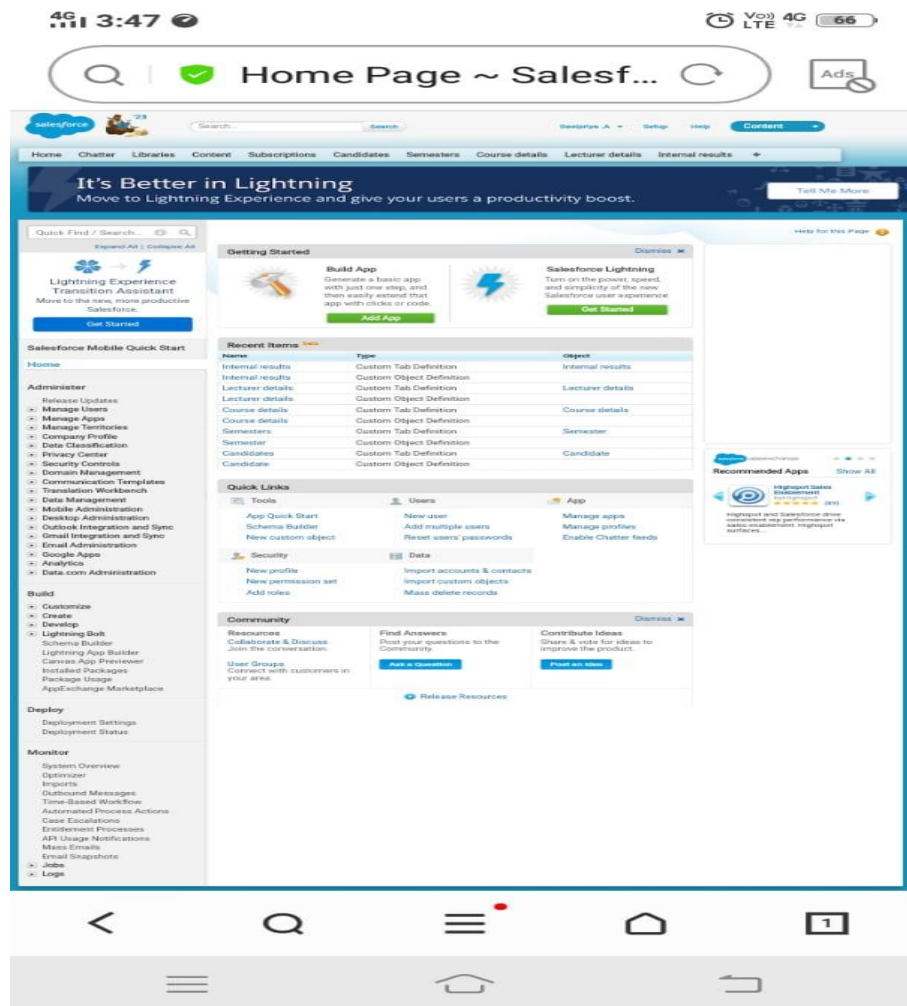
CUSTOM OBJECT:



Creation of objects for candidate internal result card, for this candidate internal result card we need to create 5 objects it that Semester, Candidate, Course Details, Lecturer Details, Internal Results.

FIELD AND RELATIONSHIP

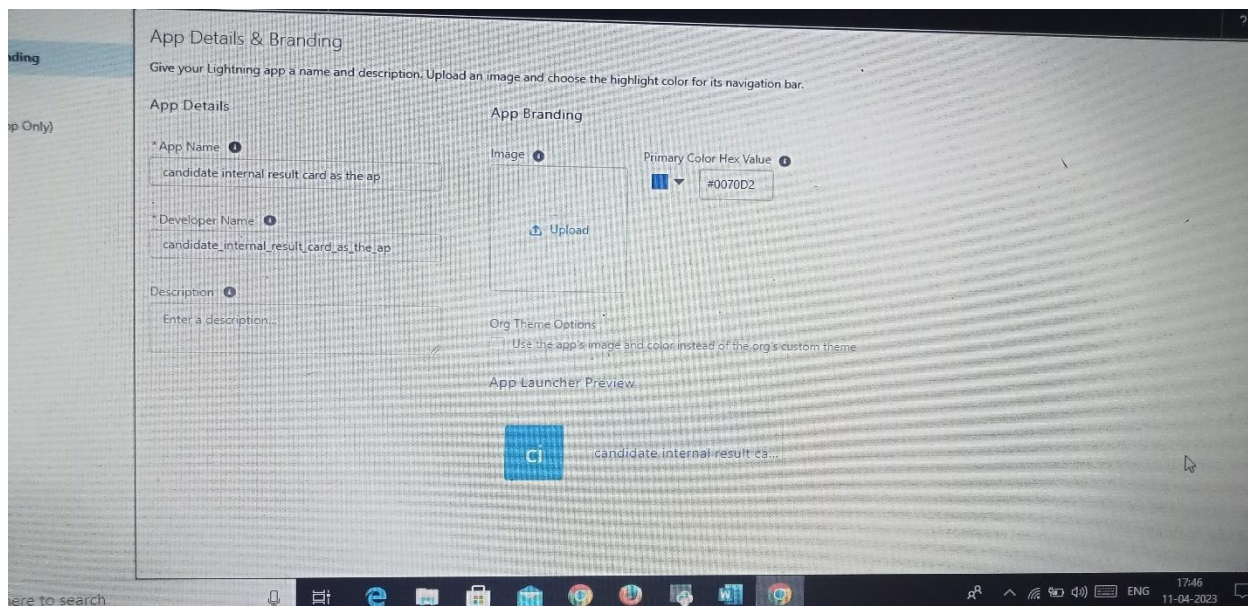
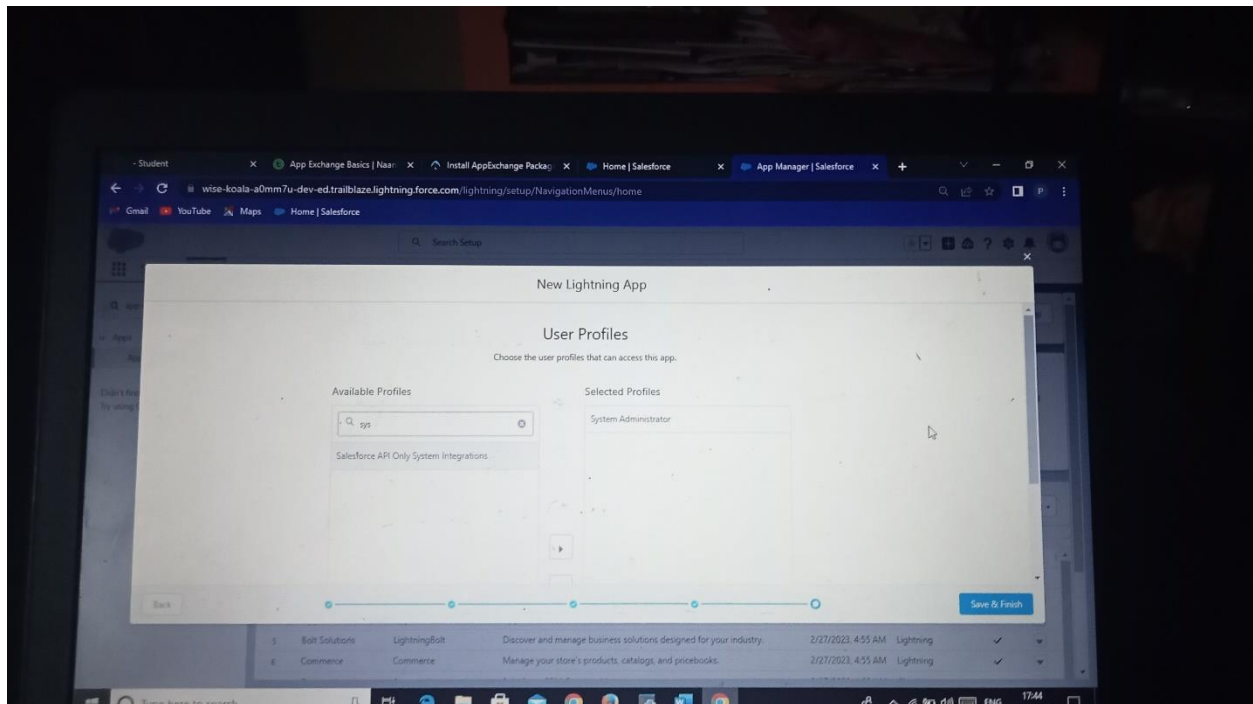
CREATION OF FIELDS



Relationship are created custom relationship fields on an object. This is done do that when users view, records, they can also see and access related data.

LIGHTNING APP

CREATE THE CANDIDATE INTERNAL RESULT CARD APP



App in Salesforce are a group of tabs that help the application function by working together as a unit. We are create the lightning app of candidate internal result car

USERS

CREATING A USERS

The screenshot shows the 'New User' setup page in Salesforce. The page is titled 'New User' and has a 'User Edit' tab. The 'General Information' section contains the following fields:

- First Name: John Martin
- Last Name: MR
- Alias: raj
- Email: mrjeshwan771@gmail.com
- Username: john@martin2003
- Nickname: User168121688209062697
- Title: (empty)
- Company: (empty)
- Department: (empty)
- Division: (empty)

The 'Role' section on the right includes:

- Role: --None Specified--
- User License: Salesforce
- Profile: Sales User
- Active: ☒
- Marketing User: ☐
- Offline User: ☐
- Knowledge User: ☐
- Flow User: ☐
- Service Cloud User: ☐
- Site.com Contributor User: ☐
- Site.com Publisher User: ☐
- WDC User: ☐
- Data.com User Type: --None--
- Data.com Monthly Addition Limit: Default Limit (300)
- Accessibility Mode (Classic Only): (empty)

The bottom of the page shows a taskbar with various application icons and a system clock indicating 18:04 on 11-04-2023.

The screenshot shows the 'User Detail' page for the user 'John Martin MR'. The page is titled 'User John Martin MR - Salesforce - Developer Edition'. The 'User Detail' section contains the following information:

- Name: John Martin MR
- Alias: raj
- Email: mrjeshwan771@gmail.com
- Username: john@martin2003.com
- Nickname: User168121688209062697
- Title: (empty)
- Company: (empty)
- Department: (empty)
- Division: (empty)
- Address: (empty)
- Time Zone: (GMT-07:00) Mountain Standard Time (America/Phoenix)
- Locale: English (United Kingdom)
- Language: English
- Delegated Approver: (empty)
- Manager: (empty)

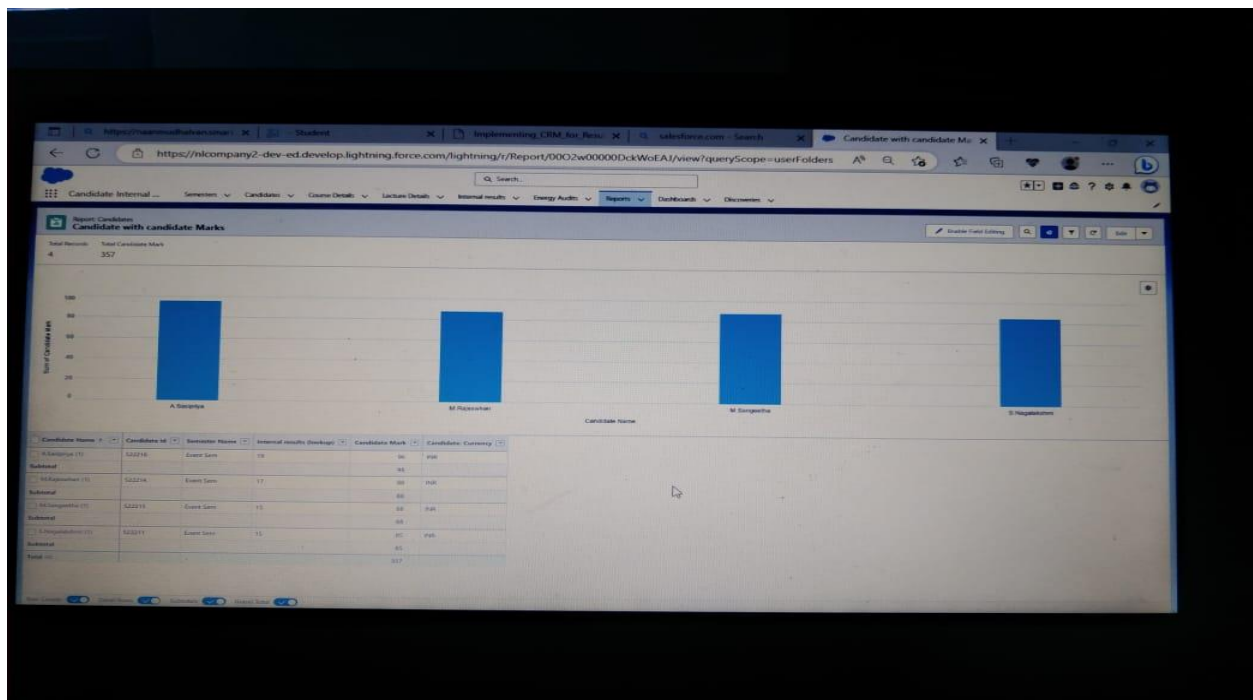
The 'Role' section on the right includes:

- Role: Salesforce
- User License: Sales User
- 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: (empty)
- Accessibility Mode (Classic Only): (empty)

The bottom of the page shows a taskbar with various application icons and a system clock indicating 18:05 on 11-04-2023.

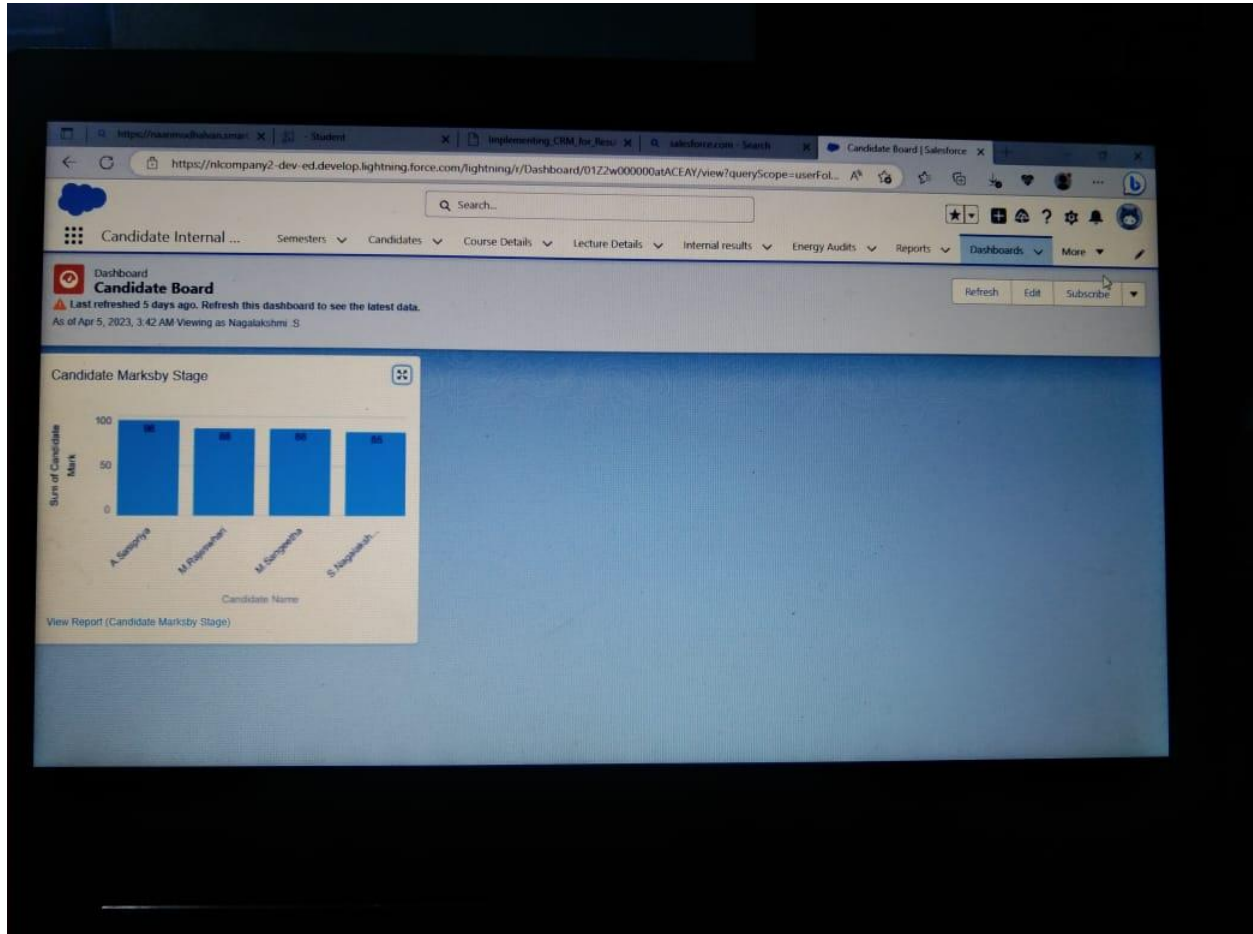
every user in salesforce has a user account. Click setup enter user, select new user , enter the details, we get new user

REPORTS



A Report is a list of records that meet the criteria you define. Its 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.

DASHBOARDS



Dashboards let you curate data from reports using charts, tables, and metrics. Dashboards filters make it easy for users to apply different data perspectives to a single dashboards.

TRAILHEAD PROFILE PUBLIC URL

Team Lead-<https://trailblazer.me/id/nagas210>

Team Member 1-<http://trailblazer.me/id/mmrajeshwari>

Team Member 2-<https://trailblazer.me/id/sangeetha2405>

Team Member 3-<https://trailblazer.me/id/sasipriyaa>

ADVANTAGES

1. It helps teachers keep track of student performance and to study their progress throughout the course or degree.
2. Implementing CRM in result tracking with internal marks will help you streamline this process.
3. CRM systems provide real-time numbers, graphs and data that may be useful in decision making.
4. It also enables us to perform a search by keyword, sign documents digitally and send documents digitally.

DISADVANTAGES

1. Software subscription or purchase fees
2. Premium upgrades, eg add-on marketing or reporting features
3. Customisation
4. IT resources needed
5. Hardware or software requirements
6. Staff training and upskilling

APPLICATIONS

Implementing CRM in result tracking can be used in all educational institutions to track candidate results.

It can be used both in schools and colleges.

In schools, college even in universities, it would be very useful in monitoring students performance and records.

CONCLUSION

Educational institutions deals with lots of test paper and student evaluation.

It is a painstaking process for teachers to evaluate and keep track of student test and assessment.

So we have came up with a solution known as implementing CRM in result tracking with Internal Marks.

We have customized objects, fields and created Candidate Result card app in that app e create reports and customized dashboard showing marks of student as vertical bars.

By this app we can show the students result in graphical representation which in easier to manage their results.

FUTURE SCOPE

OMNICHANNEL DASHBOARDS-

Deeply integrates with social media, websites, cloud telephony, and other software to bring all queries to a unified dashboards.

AUTOMATIONS-

AL-powered bots, automated feedback or information form collection, and canned responses save time for your staff.

