Project Documentation and Report

LONGTERM INTERNSHIP ON SALESFORCE ADMINISTRATION

Title of the project : Implementing CRM For Result Tracking Of A Candidate with Internal Marks

Industry Mentor : Tarakesh

Faculty (Mentor): K. Anjaneyulu

Team ID   : LTVIP2023TMID08745

Team Size   : 5

Team Leader   : NALLAMEKALA DEEPIKA

Team member   : PUVVADI MONISHA

Team member   : C. Thejaswini

Team member   : M. Chandana

Team member   : B. Sonali

1.INTRODUCTION:

OVERVIEW: The Improved features of **CRM** software have increased both its complexity and necessity. Nearly half of **CRM** Implementation campaigns suffer from improper preparation and misaligned objectives among internal stakeholders. A properly conceived **CRM** implementation strategy, development and future. This article is for small business owners who want to make sure they are taking the right steps when implementing a new **CRM** system.

 ❖ Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer. *L*ecturer 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.

PURPOSE: It saves a lot of time. The purpose of the project is to manage school student's result tracking process in the easy way. Students do not need to check the notice board and everyone will stay updated this is the main purpose of this project. Can work easily. Increase candidate quality.

2.LITERATURE SURVEY:

EXISTING PROBLEM: Teams implementing and maintaining a **Customer Relationship Management** system may run into five CRM challenges:

- High cost
- Too little time
- Bad data

- Lack of communication
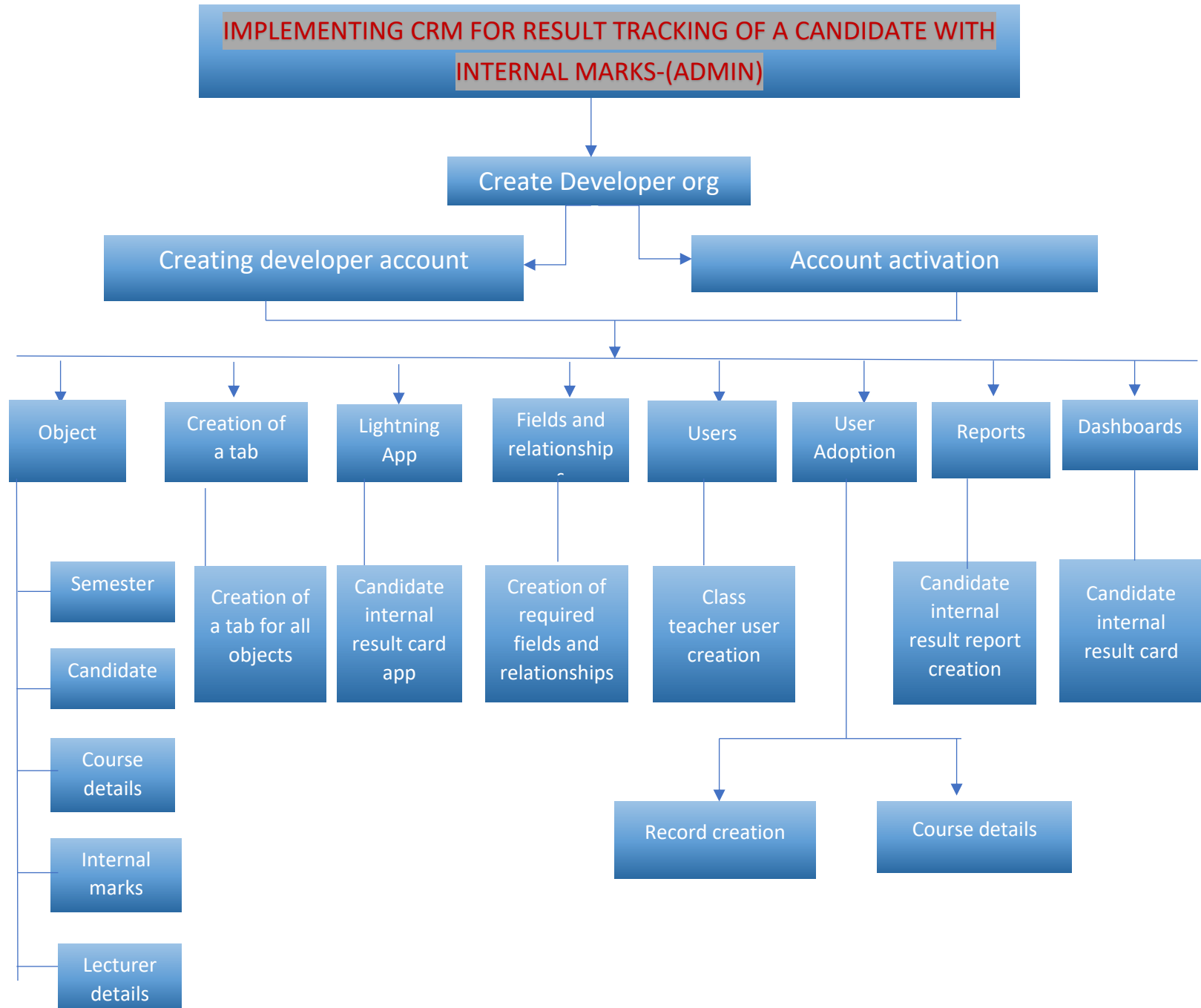- Limited technology
- IT capabilities.

A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with **CUSTOMER RELATIONSHIP MANAGEMENT** may break down and result in loss of revenue, unless everyone

In the business is committed to viewing their operations from the customers' perspective.

PROPOSED SOLUTION: A CRM solution is the one that aids in your business to organize the interactions and relationships with customers and clients. CRM solutions are always centralized about the data which pertains to the current and future customers so that your marketing management team can remain posted and informed all the time.

3.THEORITICAL ANALYSIS:

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS-(ADMIN)

Create Developer org

Creating developer account

Account activation

Object	Creation of a tab	Lightning App	Fields and relationship	Users	User Adoption	Reports	Dashboards

- Semester
- Candidate
- Course details
- Internal marks
- Lecturer details

Creation of a tab for all objects

Candidate internal result card app

Creation of required fields and relationships

Class teacher user creation

Candidate internal result report creation

Candidate internal result card

Record creation

Course details

HARDWARE /SOFTWARE DESIGNING: **CRM software** is a modular technology system that includes sales automation, analytics, and marketing automation tools to gather customer data and empower sales teams to work at peak efficiency. **Customer Relationship Management** solutions have become a mainstream part of the business world.

Today CRM software is one of the biggest software markets globally and the growth isn't slowing down. In fact, **CRM implementation is expected to a mass over $80 billion in revenues by 2025.**

4.RESULT:

STEP 1:

Create account by using Salesforce Developer. Signup

> ➤ *We have created a developer org and activated the account.*
>
> *Sign up link :* https://developer.salesforce.com/signup
>
> *Salesforce login link:* https://login.salesforce.com

> ➤ *In the below screen we had logged into salesforce org*
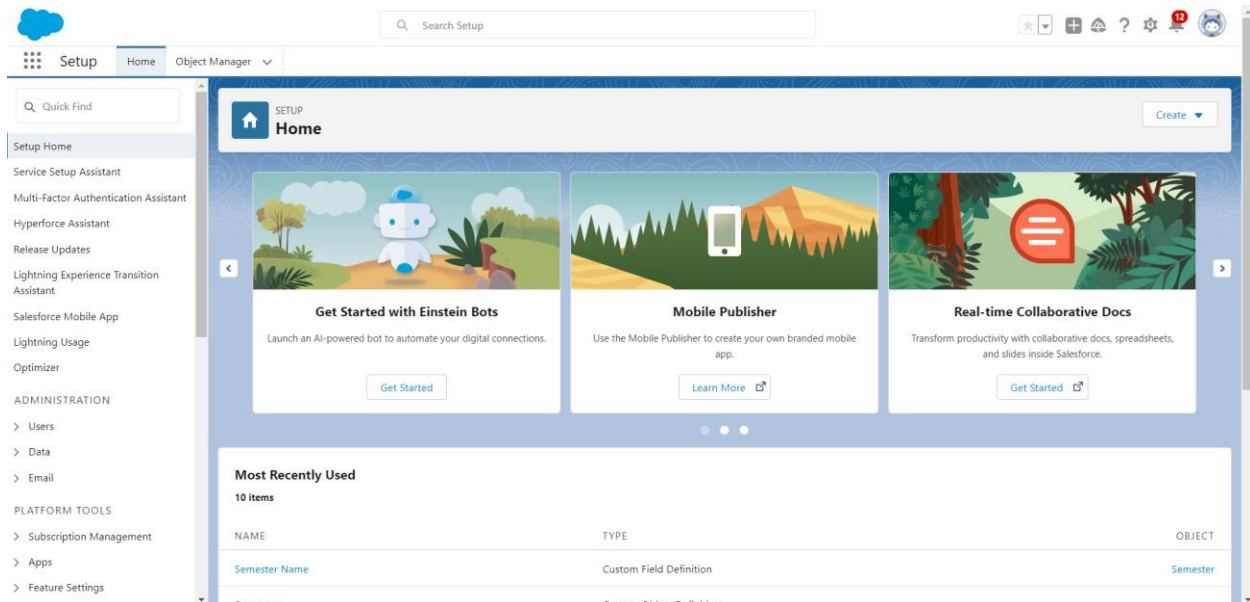
Step:2 OBJECT

We had created Semester, Candidate, Course details, Lecturer details, Internal results objects for candidate internal result card.
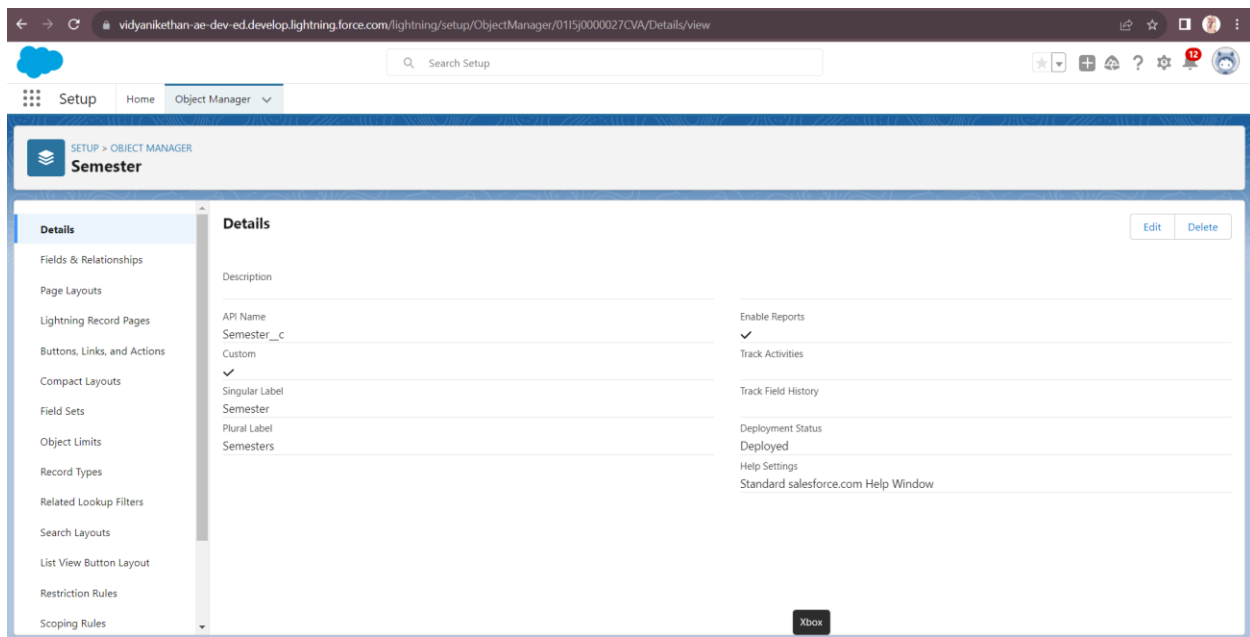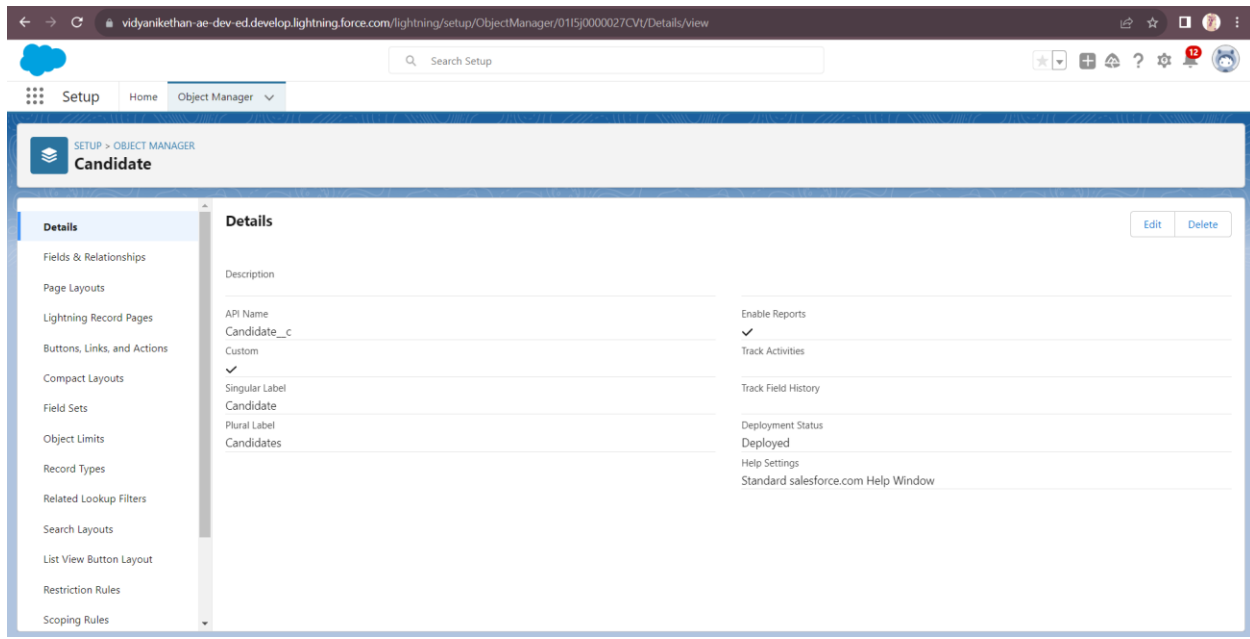
Step:3 TAB
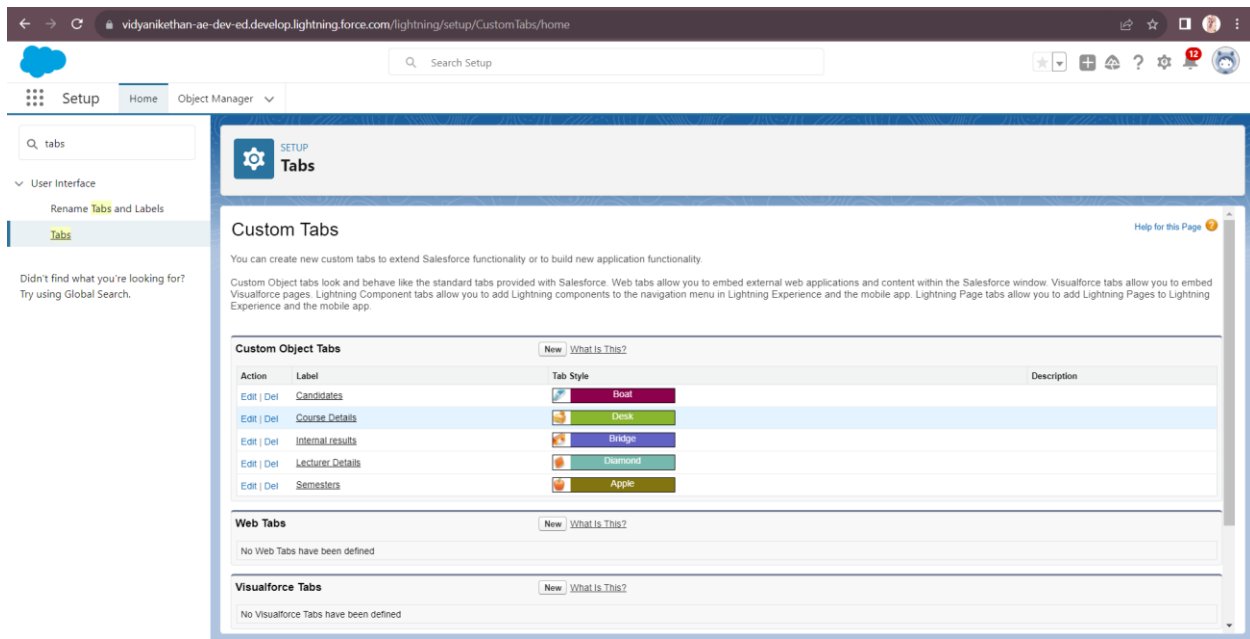
➢ Tabs in Salesforce help users view the information at a glance. It displays the data of objects and otherweb content in the application.

There are mainly 4 types of tabs:

(A) Standard Object Tabs: Standard object tabs display data related to standard objects

(B) Custom Object Tabs: Custom object tabs displays data related to custom objects.

(C) Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.

(D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

STEP 4: 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. There are two types of app –

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce chatter, App Launcher, etc are present in it.

Note: The description, Logo, and Label of standard app cannot be altered.

2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

STEP 5: **FIELDS AND RELATIONSHIPS**

➢ We had created the fields and relationships for the given objects(Candidate, Semester, Lecturer details, Course details and Internal results)
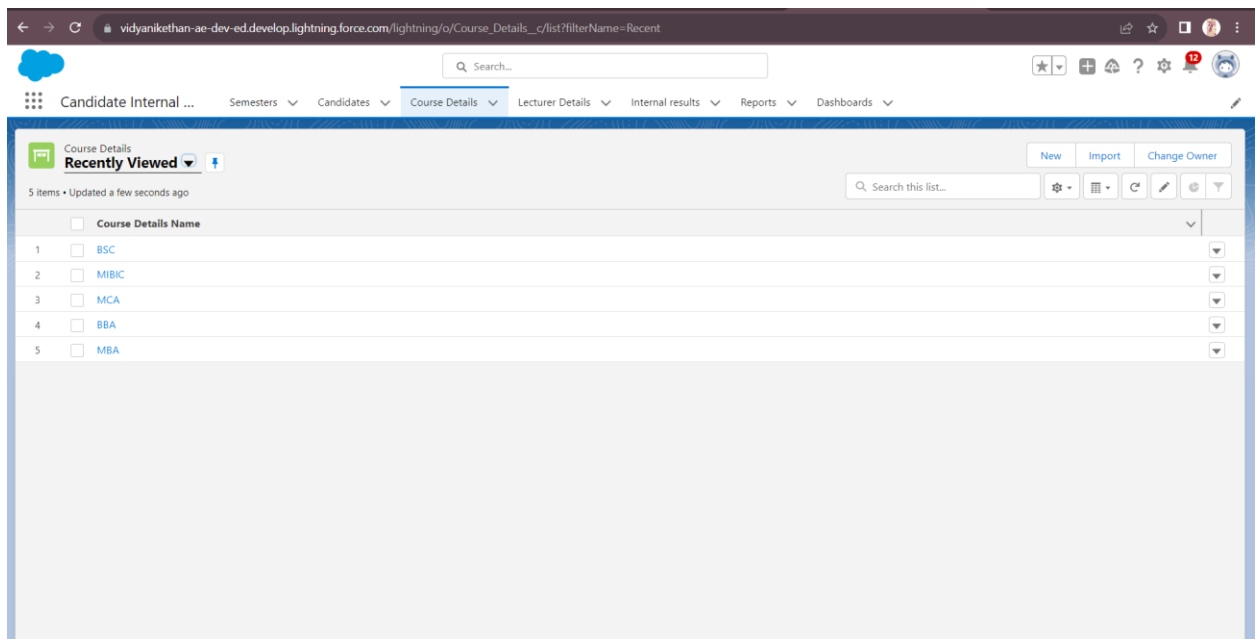
STEP 6: USERS

➤ 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.

STEP 7: USER ADOPTION

➤ Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

STEP 8: REPORTS

We had created reports for all the objects.

> ➢ Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question.

STEP 9: DASHBOARDS
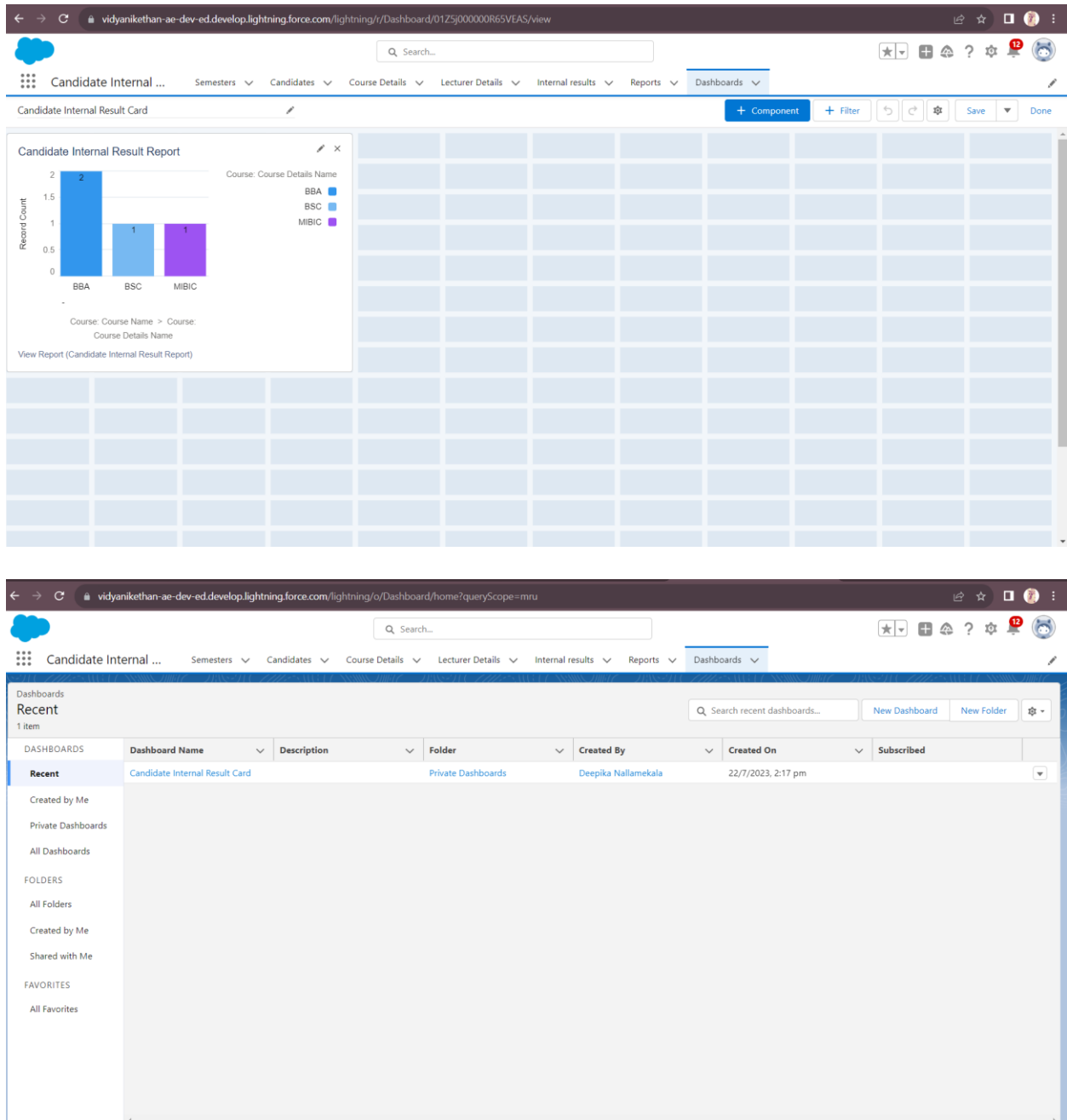
➢ Dashboards let you curate data from reports using charts, tables,and metrics. If your colleagues need more information, then they'reable to view your dashboard's data-supplying reports. Dashboard filters make

it easy for users to apply different data perspectives to asingle dashboard.

5.ADVANTAGES &DISADVANTAGES:

Advantages of CRM :

- It allows for more effective sales and marketing.

- It can speed up the sales conversion process.

- It increases staff productivity, lowers time costs and boosts morale.

- It enables widely dispersed teams to work closely.

- Can improve customer loyalty through exceptional experience.

DISADVANTAGES OF CRM:

- Staff over-reliance on CRM may diminish customer loyalty through a bad experience.

- Security concerns associated with centralized data

- The excess initial time and productivity cost of implementation

- It requires a process-driven sales organization.

6.APPLICATIONS OF CRM:

- *TRACKING CUSTOMER:* A good CRM helps you understand your market and the needs of your customers. As you attract more customers, a CRM makes two things clear: who is interested in what you have to offer, and what is most important to them.

- *COLLECTING DATA FOR MARKETING:* When you are working in spreadsheets and scrolling through email chains, it's hard to get a big picture of all the important data about current and future customers.

- Improving interactions and communications

- Streamlining internal sales process

- Planning your Operations

7.CONCLUSION:

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty. The goal of a company's CRM strategy is to increase revenue while simultaneously enhancing customer service levels.

8.FUTURE SCOPE:

CRM will continue to report key data and give insight for future action, however, leading experts see CRM evolving to measure and inform sales enablement and customer engagement while playing a tremendous role in the success of future business.