

***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. 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.

**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.

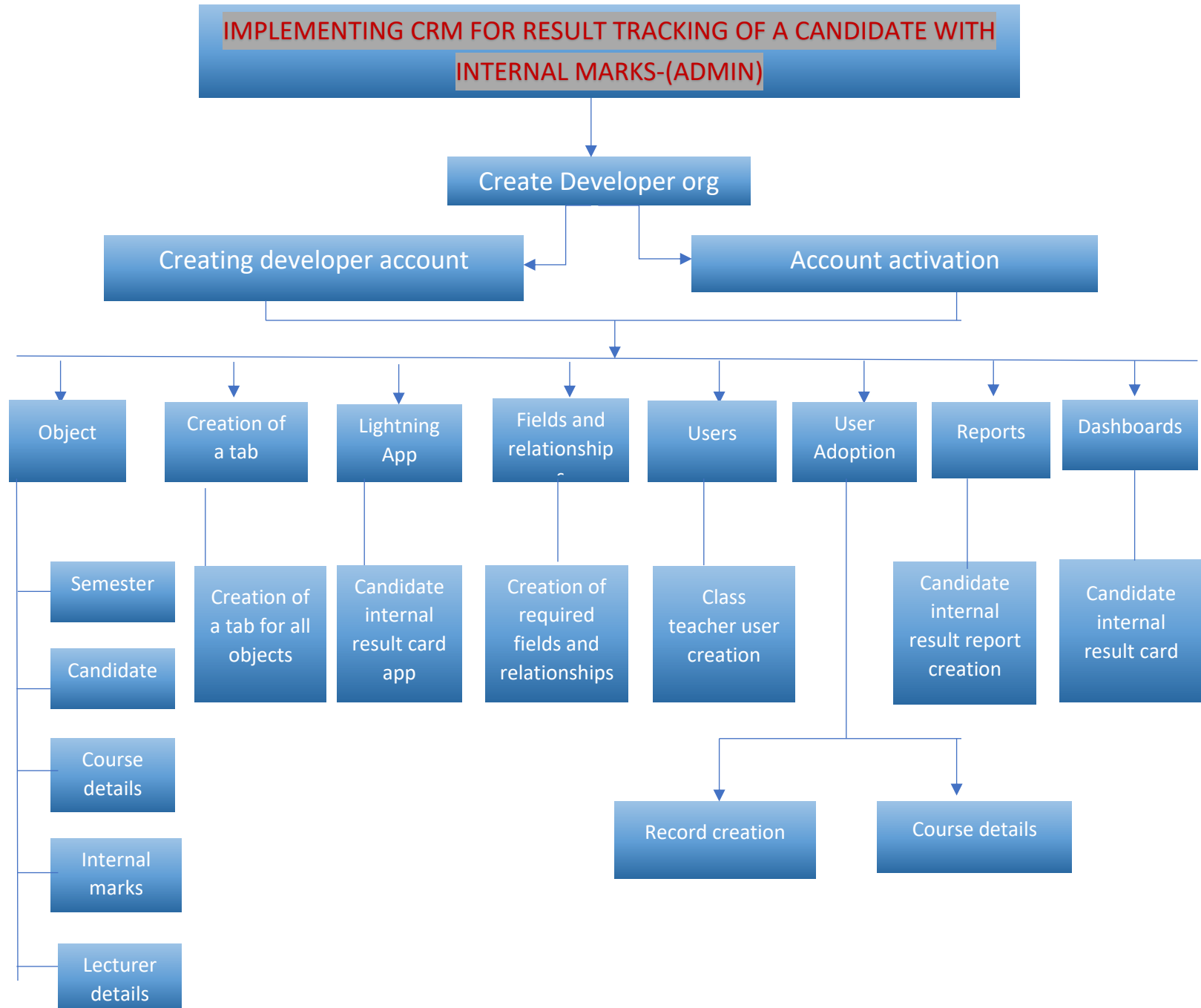
A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with **CUSTOMER RELATIONSHIP MANAGEMENT** may break down and result in loss of revenue, unless everyone

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:**

#### **BLOCK DIAGRAM**



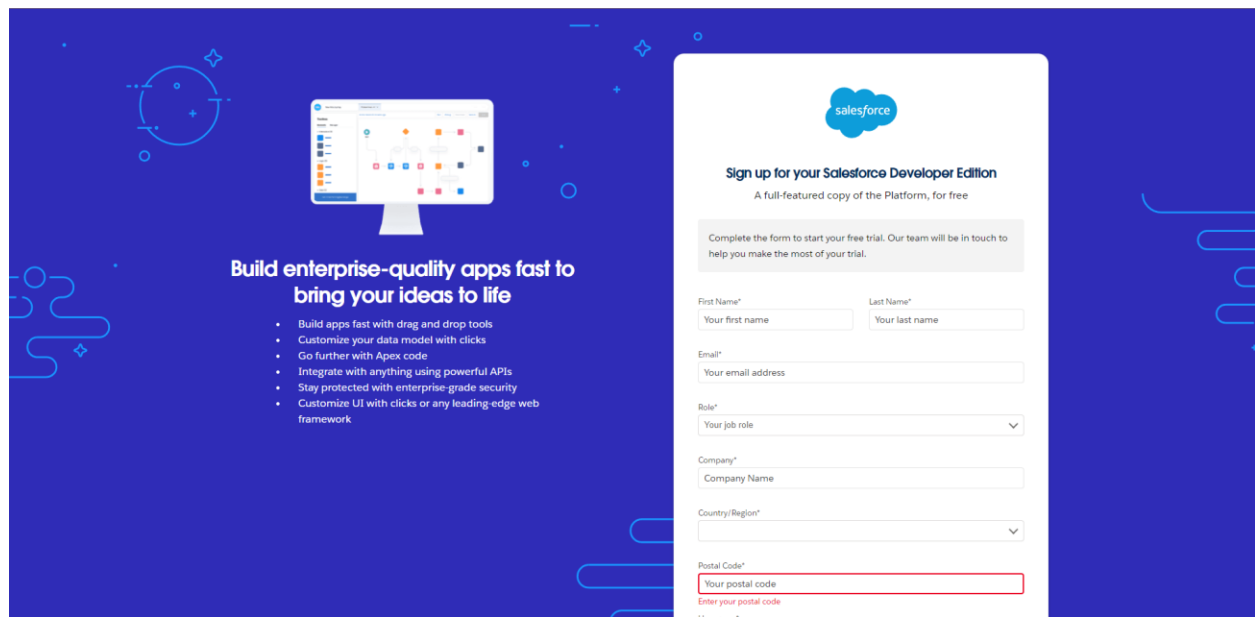
**HARDWARE /SOFTWARE DESIGNING:** **CRM software** is a modular technology system that includes sales automation, analytics, and marketing automation tools to gather customer data and empower sales teams to work at peak efficiency. **Customer Relationship Management** solutions have become a mainstream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

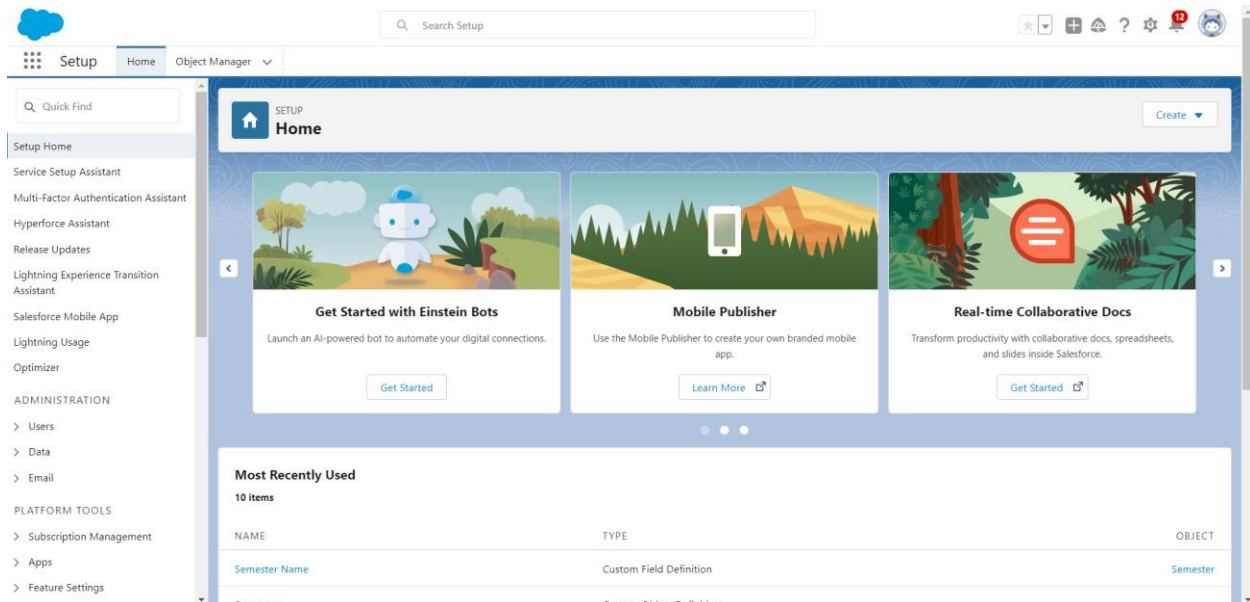
The image shows a screenshot of the Salesforce Developer Edition signup page. The background is dark blue with white and light blue geometric patterns. On the left, there's a section titled "Build enterprise-quality apps fast to bring your ideas to life" with a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". In the center, there's a small image of a computer monitor displaying a Salesforce interface. On the right, there's a white box containing the Salesforce logo and the text "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". Below this, there's a form with fields for "First Name\*", "Last Name\*", "Email\*", "Role\*", "Company\*", "Country/Region\*", and "Postal Code\*". The "Postal Code\*" field is highlighted with a red border and contains the text "Your postal code" and "Enter your postal code".

➤ *We have created a developer org and activated the account.*

*Sign up link :* <https://developer.salesforce.com/signup>

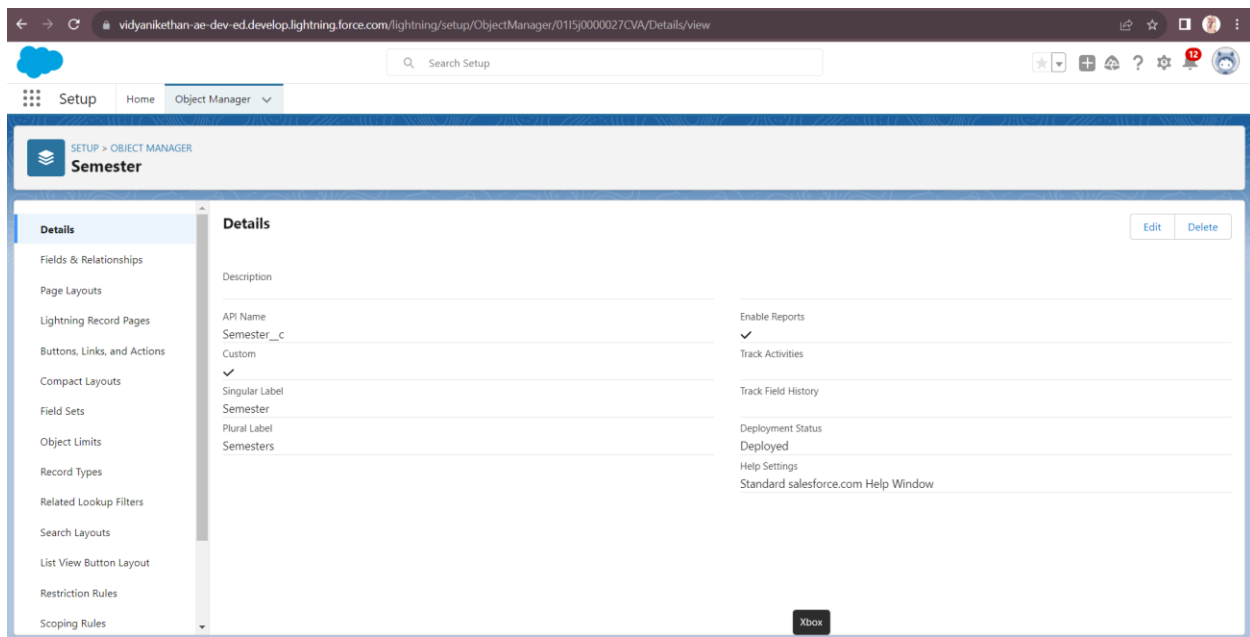
*Salesforce login link:* <https://login.salesforce.com>

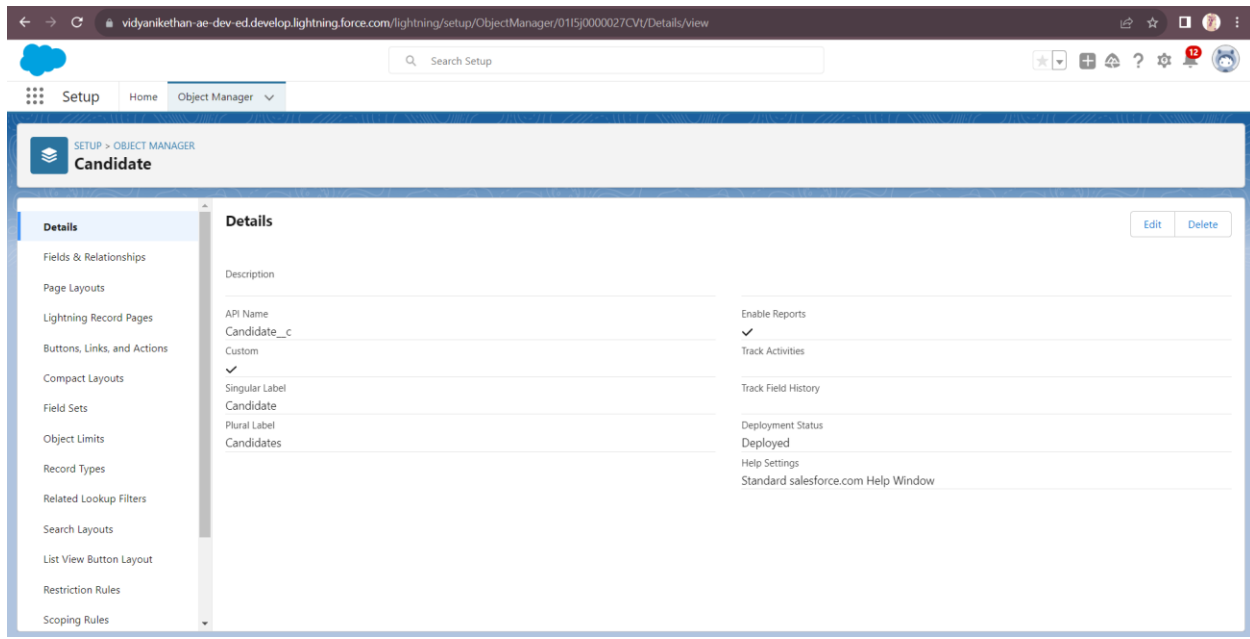
➤ In the below screen we had logged into salesforce org



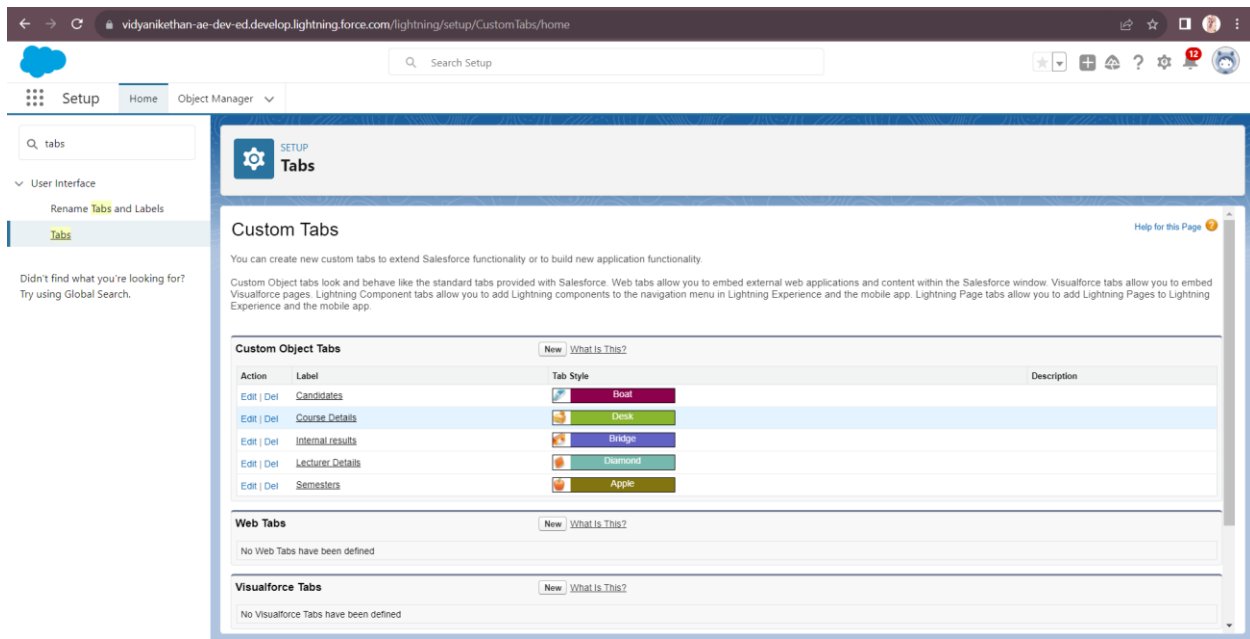
## **Step:2 OBJECT**

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 other web 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**

The screenshot displays the Lightning App Builder interface in a web browser. The browser's address bar shows the URL: `vidyanikethan-ae-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u5j000000ZmPAAW8retUrl=https%3A%2F%2Fvidyanikethan-ae-dev-ed.develop.lightning.force.com%2F...`. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Candidate Internal Result Card'. A left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and contains the following sections:

- App Details**: Includes fields for 'App Name' (filled with 'Candidate Internal Result Card'), 'Developer Name' (filled with 'Candidate\_Internal\_Result\_Card'), and 'Description' (placeholder 'Enter a description...').
- App Branding**: Includes an 'Image' upload section with an 'Upload' button, and a 'Primary Color Hex Value' field (filled with '#0070D2').
- Org Theme Options**: A checkbox labeled 'Use the app's image and color instead of the org's custom theme' which is currently unchecked.
- App Launcher Preview**: Shows a preview of the app launcher with a blue square icon containing the letters 'CI' and a label 'Candidate Internal Result C...'.



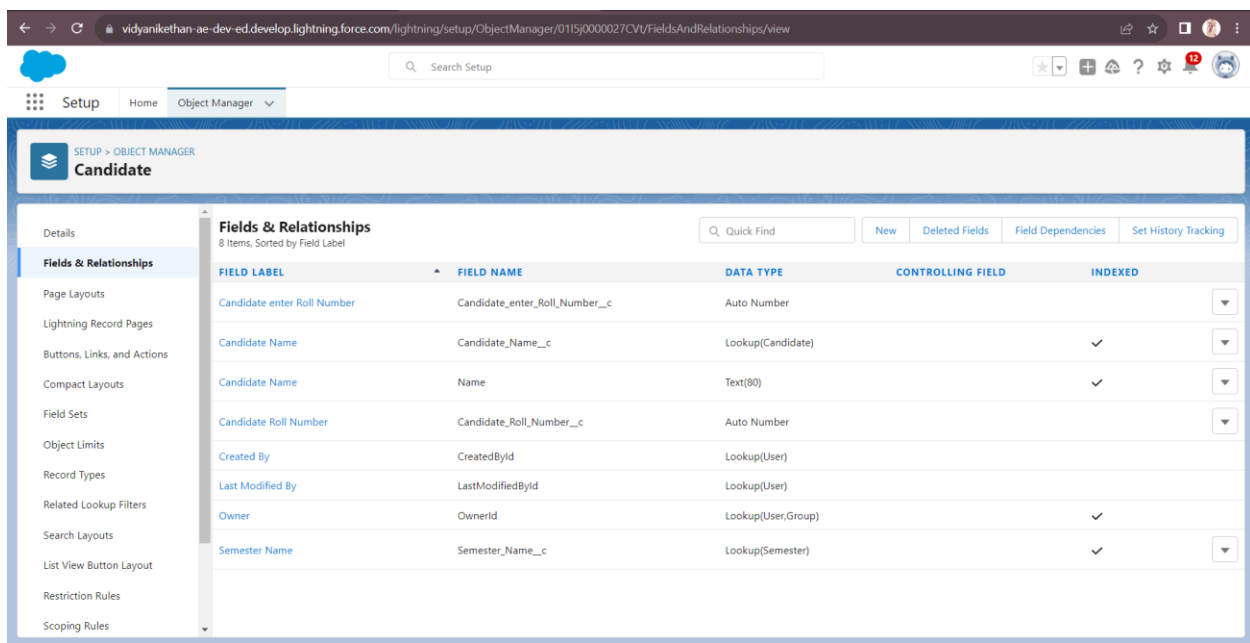
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs. There are two types of app –

**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



The screenshot shows the Salesforce Setup interface for the 'Candidate' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Candidate enter Roll Number (Auto Number), Candidate Name (Lookup(Candidate)), Candidate Name (Text(80)), Candidate Roll Number (Auto Number), Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), and Semester Name (Lookup(Semester)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate enter Roll Number	Candidate_enter_Roll_Number__c	Auto Number		
Candidate Name	Candidate_Name__c	Lookup(Candidate)		✓
Candidate Name	Name	Text(80)		✓
Candidate Roll Number	Candidate_Roll_Number__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name__c	Lookup(Semester)		✓

SETUP > OBJECT MANAGER  
Semester

Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

Quick Find

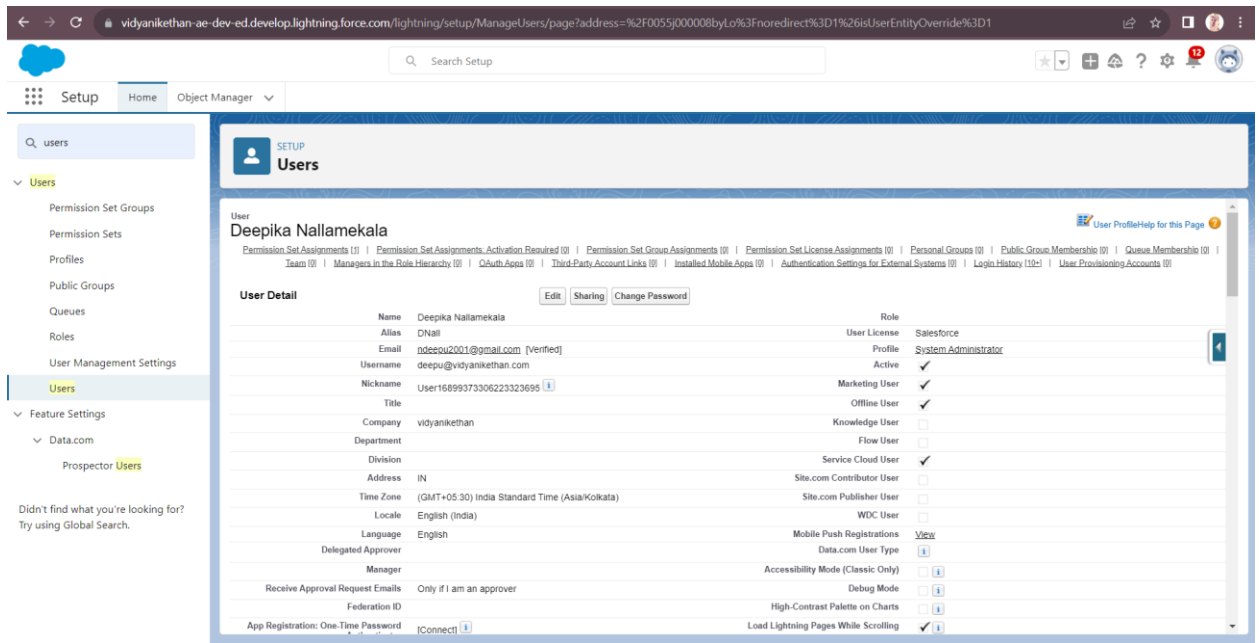
New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course__c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Semester Name	Semester_Name__c	Lookup(Semester)		✓
Semester Name	Name	Text(80)		✓

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

- We had created the fields and relationships for the given objects(Candidate, Semester, Lecturer details, Course details and Internal results)

## STEP 6: USERS



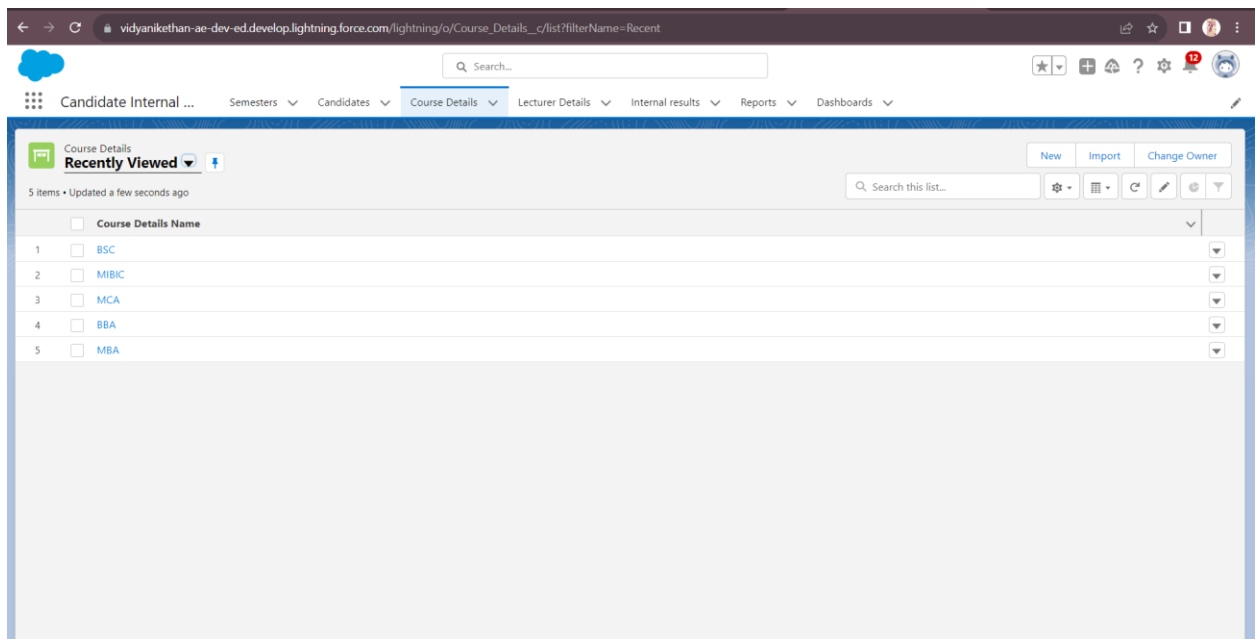
The screenshot shows the Salesforce Setup interface for user management. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area displays the 'Users' setup page for a specific user, Deepika Nallamekala. The user's profile is shown with various details and settings.

**User Detail**

Field	Value	Field	Value
Name	Deepika Nallamekala	Role	Salesforce
Alias	DNall	User License	System Administrator
Email	ndeeou2001@gmail.com [Verified]	Profile	Active
Username	ndeeou@vidyanikethan.com	Marketing User	<input checked="" type="checkbox"/>
Nickname	User16899373306223323695	Offline User	<input checked="" type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	vidyanikethan	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input checked="" type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	IN	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<a href="#">View</a>
Language	English	Data.com User Type	<a href="#">i</a>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Manager		Debug Mode	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">i</a>
App Registration: One-Time Password	<a href="#">iConnect</a> <a href="#">i</a>		

- 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.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The 'Reports' tab is active, displaying the 'Candidate Internal Result Report' for the 'Semesters with Course' group. The report is in preview mode, showing a table with columns: Course: Course Name, Course: Course Details Name, BBA, BSC, MIBIC, and Total. The table has 4 rows, with the first row being the header and the last row being the total. The 'Total' column shows values 6, 4, 6, and 4 for the four rows respectively. The interface also includes a search bar, a 'Run' button, and a 'Conditional Formatting' toggle.

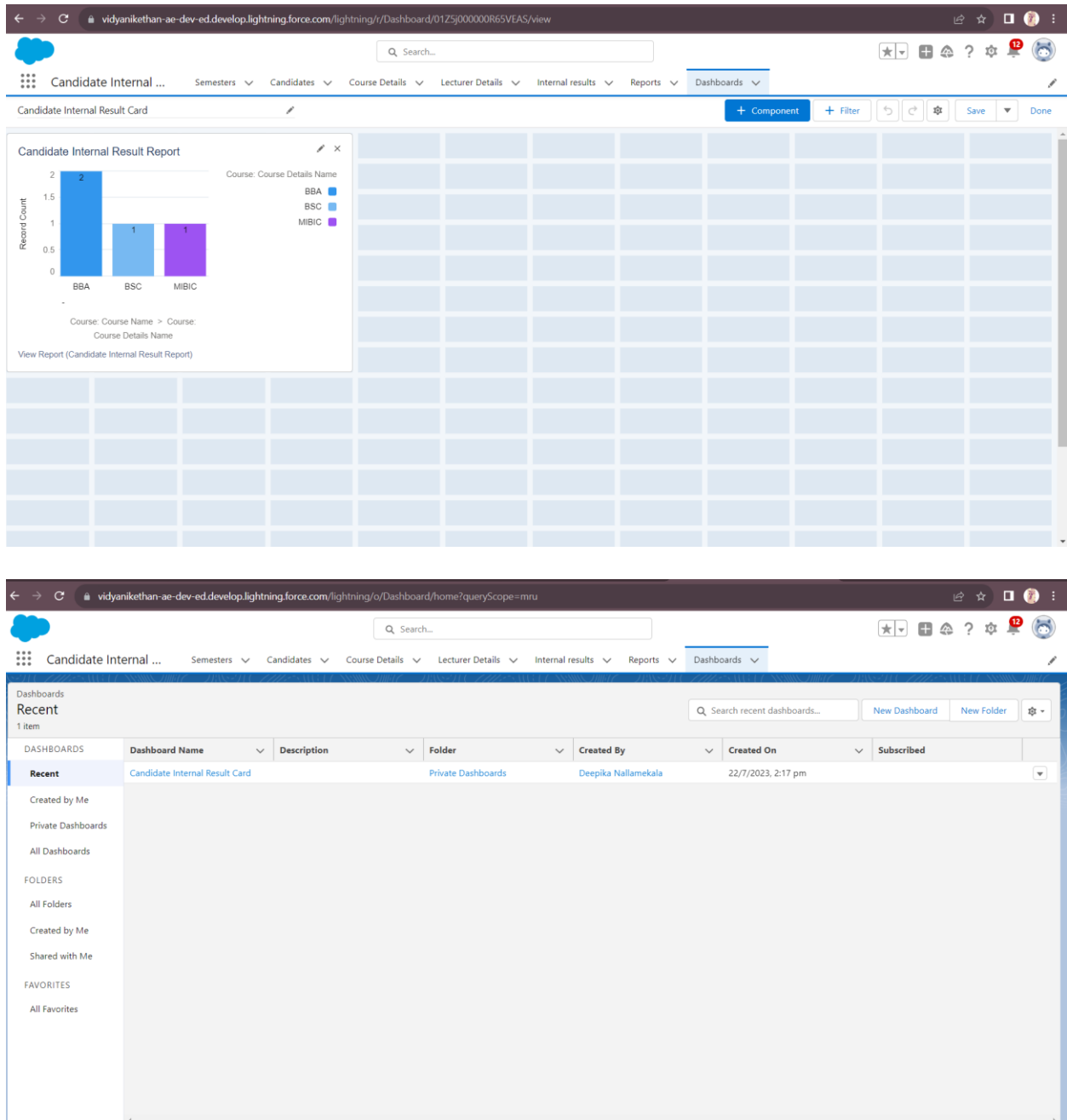
Course: Course Name	Course: Course Details Name	BBA	BSC	MIBIC	Total
-	Sum of Course: Duration	3	3	0	6
-	Record Count	2	1	1	4
Total	Sum of Course: Duration	3	3	0	6
-	Record Count	2	1	1	4

The screenshot shows the Salesforce Reports interface, specifically the 'Recent' section. The top navigation bar includes 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The 'Reports' tab is active, displaying a list of recent reports. The list has columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The first report is 'Candidate Internal Result Report' in the 'Private Reports' folder, created by 'Deepika Nallamekala' on '22/7/2023, 2:36 pm'. The interface also includes a search bar, a 'New Report' button, and a 'New Folder' button.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report		Private Reports	Deepika Nallamekala	22/7/2023, 2:36 pm	

- 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'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.

## **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.