

NM SMARTINTERNZ PROJECT.

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS.

CREATED BY III B Sc PHYSICS STUDENTS AT
GOVERNMENT ARTS COLLEGE UDUMALPET

TEAM :

1. ROHITPRASAD. K (HEAD)
2. NIVETHA. N
3. RAMANA. B
4. SAKKAN. G

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS.

1.INTRODUCTION

1.1.OVERVIEW.

The project aim is to provide real time Knowledge for all students who have Basic knowledge of salesforce and looking For a real-time project. This project will Also help those professionals who are in Cross-technology and want to switch to Salesforce. With the help of this project They will gain knowledge and can include It into their resume as well. A CRM is a System that helps college manage the Entire lifecycle of a potential customer Sometimes also referred to as a lead. With A CRM, you can track and store the data That's important to your operations, all in One easy-to-access place.

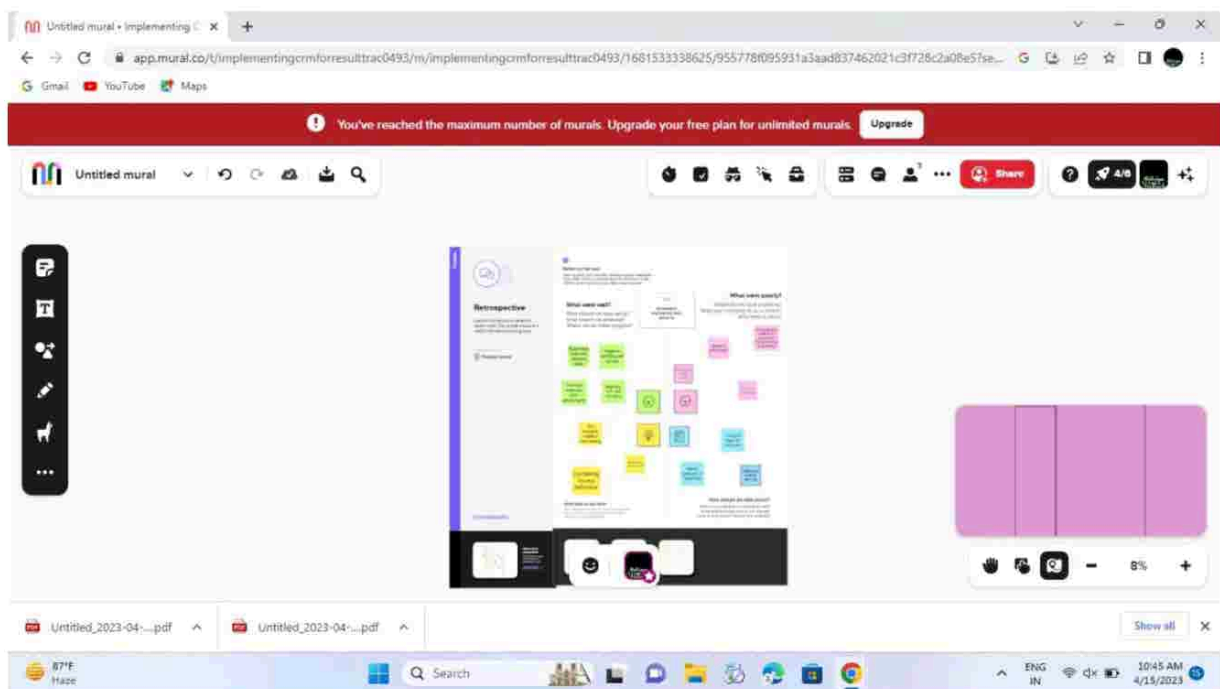
- **PURPOSE**

- Salesforce Problem
- Object
- Field And Relationship
- Lighting App
- Users
- Reports
- Dashboard

2. Definition & Design Thinking.

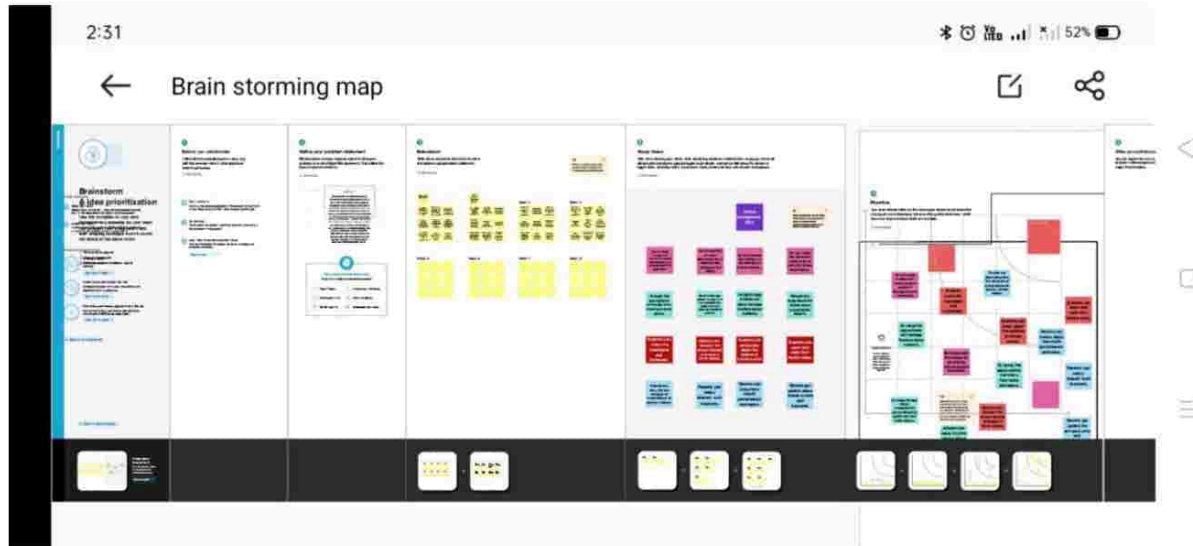
2.1 EMPATHY

MAP..



2.1 BRAIN STORMING MAP.

RESULT.

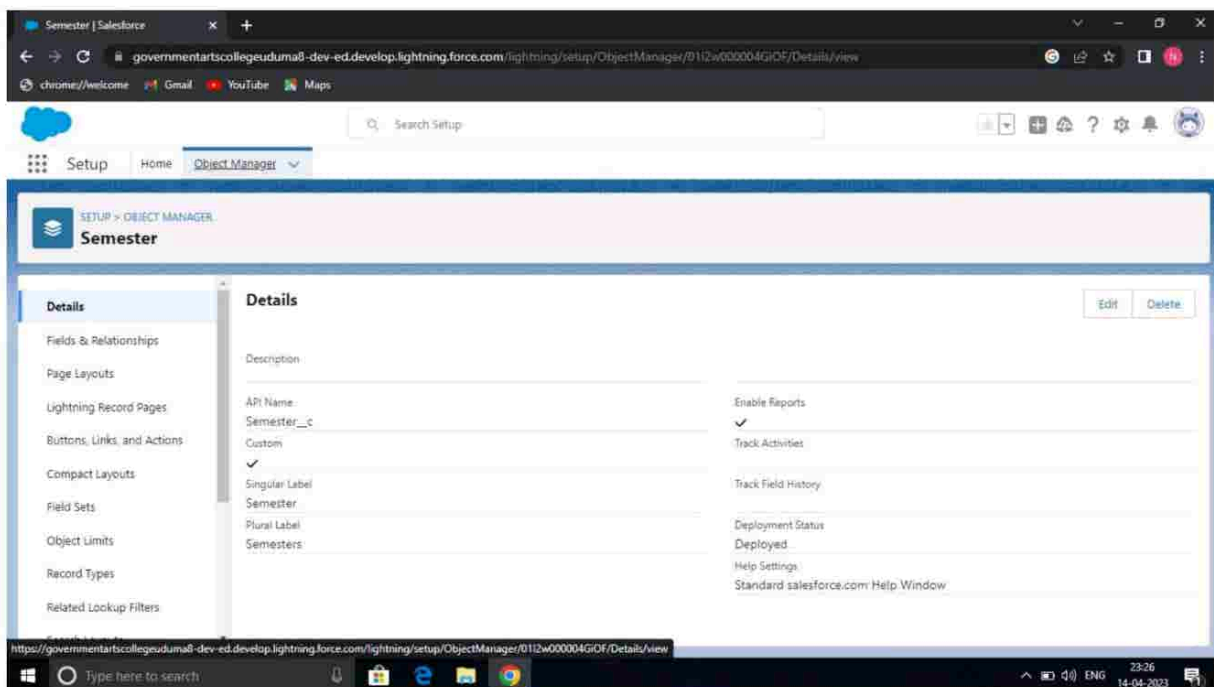


3.1. DATA MODEL.

Implementing CRM For Result Tracking Of

A Candidate With Internal Marks.

OBJECT NAME: SEMESTER



OBJECT NAME: CANDIDATE

This screenshot shows the Salesforce Object Manager interface for the 'Candidate' object. 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, and Search Layouts. The main 'Details' panel on the right includes fields for Description, API Name (Candidate__c), Custom (checked), Singular Label (Candidate), and Plural Label (candidates). On the right side of the panel, there are checkboxes for Enable Reports (checked), Track Activities, and Track Field History. Below these are sections for Deployment Status (Deployed) and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are located in the top right corner of the details panel. The browser's address bar shows the URL: `governmentartscollege-2d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bTtp/Details/view`. The system clock at the bottom right indicates 23:18 on 14-04-2023.

OBJECT NAME: COURSE DETAIL

This screenshot shows the Salesforce Object Manager interface for the 'Course detail' object. 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, and Search Layouts. The main 'Details' panel on the right includes fields for Description, API Name (Course_detail__c), Custom (checked), Singular Label (Course detail), and Plural Label (Course details). On the right side of the panel, there are checkboxes for Enable Reports (checked), Track Activities, and Track Field History. Below these are sections for Deployment Status (Deployed) and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are located in the top right corner of the details panel. The browser's address bar shows the URL: `gac-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GnCS/Details/view`. The system clock at the bottom right indicates 23:31 on 14-04-2023.

OBJECT NAME: LECTURAL DETAIL

This screenshot shows the Salesforce Object Manager interface for the 'Lecturer detail' object. 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, and Search Layouts. The main content area is titled 'Lecturer detail' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following configuration:

Field	Value
Description	
API Name	Lecturer_detail__c
Custom	✓
Singular Label	Lecturer detail
Plural Label	Lecturer details
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

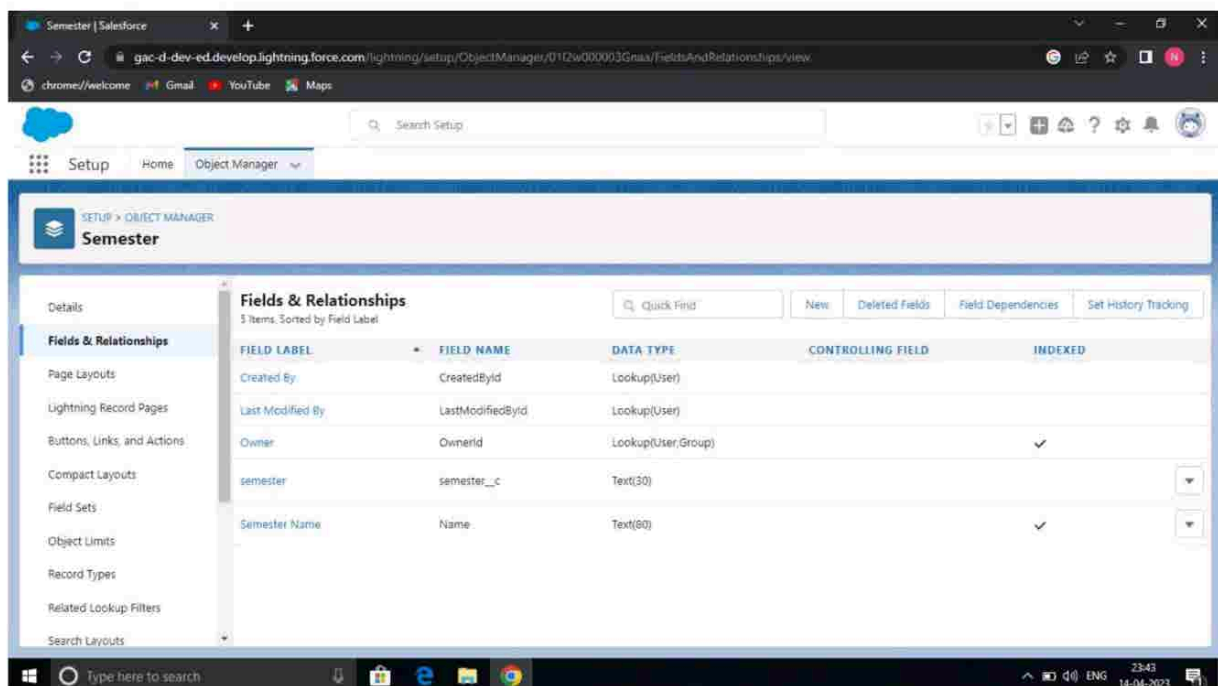
OBJECT NAME: INTERNAL RESULT

This screenshot shows the Salesforce Object Manager interface for the 'Internal result' object. 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, and Search Layouts. The main content area is titled 'Internal result' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following configuration:

Field	Value
Description	
API Name	Internal_result__c
Custom	✓
Singular Label	Internal result
Plural Label	Internal results
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

3.FIELD 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 . I included the screenshots of few of the Fields & relationships which I created for Three objects mentioned above one by one.



Candidate | Salesforce

governmentartscollege-2d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bTop/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Candidate

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Akshaya	Akshaya__c	Text(10)		
Candidate Name	Name	Text(80)		✓
Candidate_id	Akshaya05__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester name	Semester_name__c	Text(10)		

Type here to search

23:48
14-04-2023

Course Details | Salesforce

governmentartscollegeuduma8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004GgTV/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Course Details

Details

Fields & Relationships
4 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 Details Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

00:14
15-04-2023

Lecturer detail | Salesforce

gac-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GnCF/FieldsAndRelationships/view

chrome/welcome Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lecturer detail

Details

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecturer detail Name	Name	Text(80)		✓
lecturer name	lecturer_name__c	Text(31)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

23:44
14-04-2023

Internal result | Salesforce

governmentartscollege-2d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bTs7/FieldsAndRelationships/view

chrome/welcome Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Internal result

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate id	Candidate_id__c	Text(40)		
Course ID	Course_ID__c	Text(40)		
Created By	CreatedById	Lookup(User)		
Internal result Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Text(62)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

23:50
14-04-2023

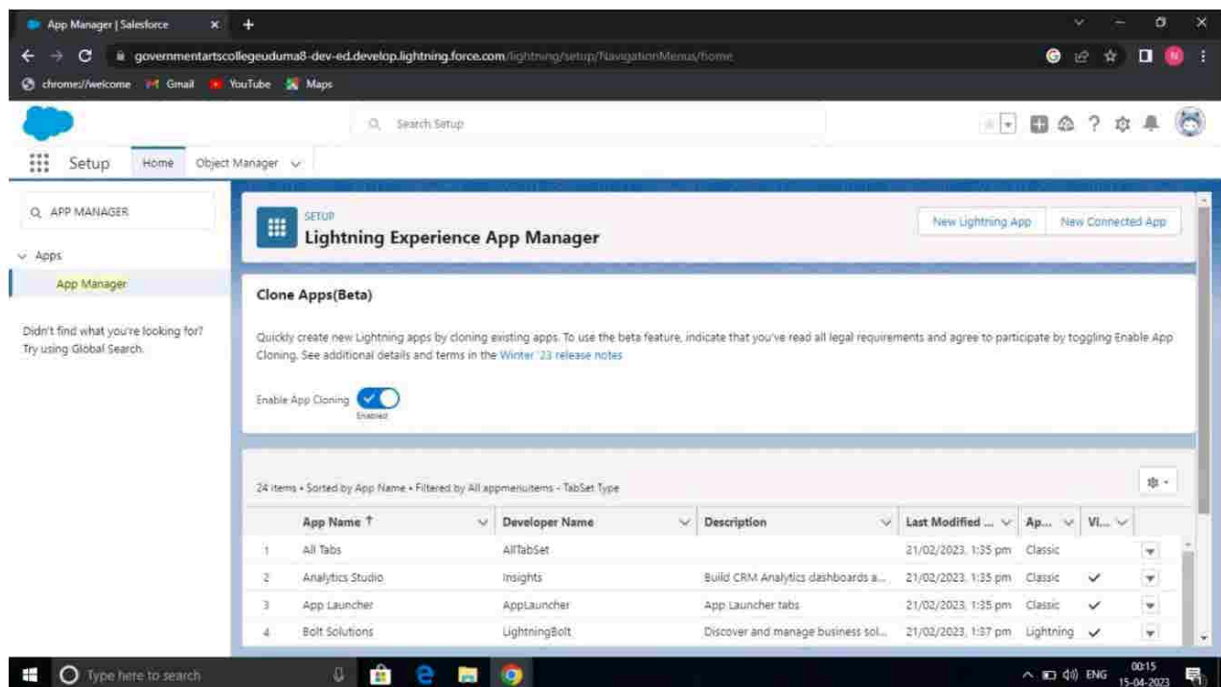
LIGHTNING APP:

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.



USERS:

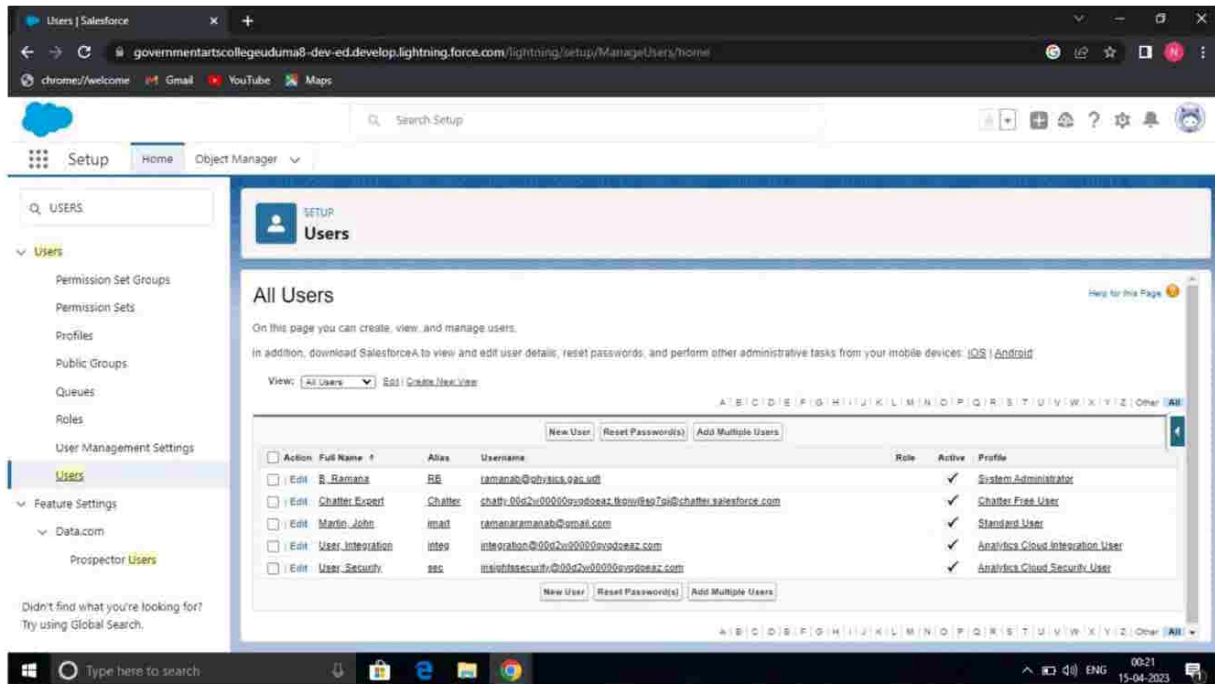
A user is anyone who logs in to

Salesforce. Users are member of school

Such as principal, teachers, students who

Need to access to the school's record. Every

User in salesforce has a user account.



A report is a list of records that meet the criteria you define. It's 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. Folders can be public, hidden, or shared, and can be set to read-only or read/write. We created reports for few schools and students and parents.

CRM For Result Tracking | Sales

governmentartscollegeuduma8-dev-ed.develop.lightning.force.com/lightning/r/Report/00Q2w00000EPD/HEAP/view?queryScope=userFolders

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Report: Accounts CRM For Result Tracking

Enable Field Editing

Total Records: 12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Ramana B	GenePoint	CA	Customer - Channel	Cold	21/02/2023
2	-	Ramana B	United Oil & Gas, UK	UK	Customer - Direct	-	21/02/2023
3	-	Ramana B	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	21/02/2023
4	-	Ramana B	Edge Communications	TX	Customer - Direct	Hot	21/02/2023
5	-	Ramana B	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	21/02/2023
6	-	Ramana B	Pyramid Construction Inc.	-	Customer - Channel	-	21/02/2023
7	-	Ramana B	Dickenson plc	KS	Customer - Channel	-	21/02/2023
8	-	Ramana B	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	21/02/2023
9	-	Ramana B	Espress Logistics and Transport	OR	Customer - Channel	Cold	21/02/2023
10	-	Ramana B	University of Arizona	AZ	Customer - Direct	Warm	21/02/2023

To Do List

Type here to search

00:18 15-04-2023

DASHBOARD:

Dashboards | Salesforce

governmentartscollegeuduma8-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mine

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Dashboards

Recent

Search recent dashboards...

New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dashboard		Private Dashboards	Ramana B	14/4/2023, 1:13 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

https://governmentartscollegeuduma8-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home

Type here to search

00:18 15-04-2023

TRAILHEAD PROFILE PUBLIC URL:

1. ROHITPRASAD. K (HEAD)

<https://trailblazer.me/id/rprasadk>

2. NIVETHA. N

<https://trailblazer.me/id/niven18>

3. RAMANA.B

<https://trailblazer.me/id/rramanabn>

4. SAKKAN.G

<https://trailblazer.me/id/mmukesh23>

Advantages &

Disadvantages

ADVANTAGES :

*With the increase in complexities,
Educational institutes have also changed
Their approach to operate. These
Organizations embraced CRM for
Educational institutions to enhance student
Experiences , streamline operations, trackk
And maintain information to develop a
Deeper understanding of their processes,
And extend their outreach.
It helps to improve student admissions
Lifecycle. It keeps alumni information safe
And accessible.
Related to student enrolment and assigned*

*Fee structure. This helps your
Administrative department avoid
Discrepancies in the payment process while
Notifying students about their due fees*

DISADVANTAGES :

- *A costly project.*
- *Loss of collected information or
Records.*
- *Not suitable for every business.*

FUTURE SCOPE

- *Voice and Conversation UI.*
- *Conversational tools.*
- *Artificial intelligence.*
- *Automation.*
- *Analytics.*
- *Mobile and social CRM.*
- *Usability.*
- *Integration.*
- *Self-service CRM.*
- *Customer experience.*
- *Personalization.*
- *Internet of things.*
- *Become more powerful to support*

