IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

INTRODUCTION

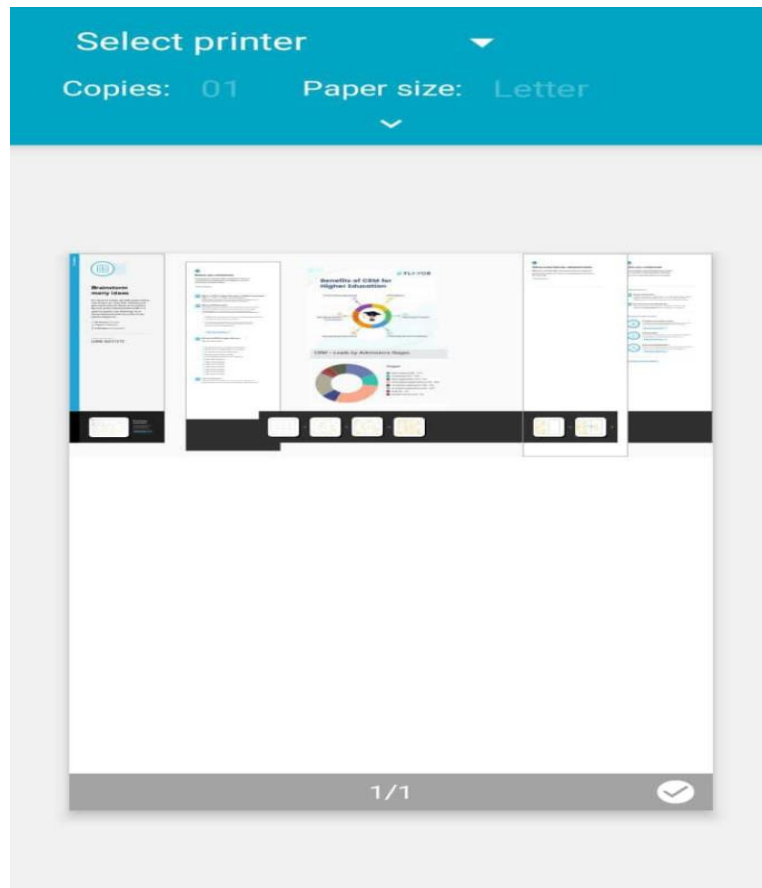**.Overview**

Salesforse is your customer success plateform,designed to help you sell.

.Purpose

Improve business relationships

Problem Definition & Design Thinking

Empathy Map

Ideation & Brainstorming Map

RESULT

Data Model

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		Course	Marks

	Name		ID	
	Internal Results(Lookup)		Course(Lookup)	

Activity & Screenshot

Activity 1:

Creating a developer Account

Creating a developer org in salesforce.

1. **GO to developers.salsforce.com/**
2. **Click on sign up.**
3. **On the sign up form , enter the following details:**
   . First name & Last name
   . Email
   . Role: Developer
   . Company:College Name
   .County: India
   .Postal Code: Pin Code
   .Username: Should be a combination of your name and company
   This need not be an actual email id, you can give anything in the format:
   username@organization.com

   Activity 2:
   To create an 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.
   .Leave all defaults as is. Click Next,Next,and Save.

Setup   Home   Object Manager ∨

Q Quick Find

SETUP
Home

Create ▼

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More ⬀

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started ⬀

ADMINISTRATION

> Users
> Data
> Email

Most Recently Used

10 items

PLATFORM TOOLS

> Subscription Management
> Apps
> Feature Settings
> Slack
> MuleSoft
> Einstein
∨ Objects and Fields
    Object Manager
    Picklist Value Sets
    Schema Builder
> Events
> Process Automation
> User Interface
> Custom Code
> Development
> Performance
> Environments
> User Engagement
> Integrations
> Notification Builder
> Offline

NAME	TYPE	OBJECT
Candidate	Custom Object Definition	
John Martin	User	
SubscriptionManagementBillingOperations	Permission Set Group	
System Administrator	Profile	
Semester	Custom Object Definition	
Semester	Custom Field Definition	Semester
Course Details	Custom Object Definition	
Internal results	Custom Object Definition	
Lecturer Details	Custom Object Definition	
Pandilakshmi R	User	

SETTINGS

> Company Settings
> Data Classification
> Privacy Center
> Identity
> Security

Activity 3:

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 theText as the data type , then click next.

.For Field Label, enter Semester Name.

.Click Next, Next, then Save.

Q Search Setup

SETUP > OBJECT MANAGER
Semester

Details	
Fields & Relationships	
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	
Triggers	
Flow Triggers	
Validation Rules	

Details   Edit   Delete

Description

API Name   Enable Reports
Semester__c   ✓

Custom   Track Activities
✓

Singular Label   Track Field History
Semester

Plural Label   Deployment Status
Semesters   Deployed

                                               Help Settings
   Standard salesforce.com Help Window

Activity 4:

Create the Candidate Internal Result Card app:

. From Setup, enter App Manager in the quick find and select App Manager.

.Click New Lighting 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, Lecture 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.
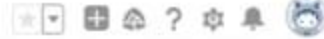
Q Search Setup

▦ Setup | Home | Object Manager ∨

Q App

Salesforce Mobile **App**
∨ Data
    Mass Transfer **Approval** Requests
∨ **Apps**
    App Manager
    AppExchange Marketplace
    ∨ Connected **Apps**
        Connected **Apps** OAuth Usage
        Manage Connected **Apps**
    ∨ Lightning Bolt
        Flow Category
        Lightning Bolt Solutions
    ∨ Mobile **Apps**
        ∨ Salesforce
            Salesforce Branding
            Salesforce Navigation
            Salesforce Notifications
            Salesforce Offline
            Salesforce Settings
    ∨ Packaging
        Installed Packages
        Package Manager
        Package Usage
∨ Feature Settings
    ∨ Analytics
        ∨ **Apps**
            App Install History
            Auto-Installed **Apps**
    ∨ Data.com
        Field **Mapping**
∨ Process Automation
    Approval Processes
∨ User Interface
    App Menu
    Lightning **App** Builder
∨ Custom Code
    Canvas **App** Previewer
∨ User Engagement
    In-**App** Guidance

Didn't find what you're looking for? Try

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes

Enable App Cloning ⬤ Disabled

22 items · Sorted by App Name · Filtered by All appmenuitems - TabSet Type   ⚙ ▾

	A. ↑ ∨	Deve... ∨	De... ∨	Last Modifie... ∨	App... ∨	Vi... ∨	
1	All Ta...	AllTabSet		31/03/2023, 11...	Classic		▾
2	Analyt...	Insights	Build ...	31/03/2023, 11...	Classic	✓	▾
3	App L...	AppLau...	App L...	31/03/2023, 11...	Classic	✓	▾
4	Bolt S...	Lightnin...	Disco...	31/03/2023, 11...	Lightning	✓	▾
5	Candi...	Candida...		07/04/2023, 3...	Lightning	✓	▾
6	Com...	Commu...	Sales...	31/03/2023, 11...	Classic	✓	▾
7	Conte...	Content	Sales...	31/03/2023, 11...	Classic	✓	▾
8	Data ...	DataMa...	Use D...	31/03/2023, 11...	Lightning	✓	▾
9	Digita...	Salesfor...	Mana...	31/03/2023, 11...	Lightning	✓	▾
10	Lightn...	Lightnin...	View ...	31/03/2023, 11...	Lightning	✓	▾
11	Marke...	Marketing	Best-i...	31/03/2023, 11...	Classic	✓	▾
12	Platfo...	Platform	The f...	31/03/2023, 11...	Classic		▾
13	Queu...	QueueM...	Creat...	31/03/2023, 11...	Lightning	✓	▾
14	Sales	Sales	The w...	31/03/2023, 11...	Classic		▾
15	Sales	Lightnin...	Mana...	31/03/2023, 11...	Lightning	✓	▾
16	Sales ...	Lightnin...	(Light...	31/03/2023, 11...	Lightning	✓	▾
17	Salesf...	Chatter	The S...	31/03/2023, 11...	Classic	✓	▾
18	Salesf...	Lightnin...	Set u...	31/03/2023, 11...	Lightning	✓	▾
19	Service	Service	Mana...	31/03/2023, 11...	Classic	✓	▾
20	Servic...	Lightnin...	(Light...	31/03/2023, 11...	Lightning	✓	▾
21	Site c...	Sites	Build ...	31/03/2023, 11...	Classic		▾
22	Subsc...	Revenue...	Get st...	31/03/2023, 11...	Lightning	✓	▾

Activity 5:

Creating a Users:

.From Setup, in the Quick find box, enter Users, and then select Users.

.Click New User.

.Enter the user's name John martin and(your)email address and a unique username in the form of an email address.

.Select a Role(none)

.Select a User Licence As salesforce.

.Select a profiles as salesforce User.

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🔍 Search Setup

ct Manager ⌄

SETUP
👤 **Users**

User
John Martin

📝 User ProfileHelp for this Page

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] |
Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] |
Managers in the Role Hierarchy [0] | OAuth Connected Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] |
Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Detail

[Edit] [Sharing] [Reset Password] [Freeze]

Name	John Martin	Role	
Alias	mart	User License	Salesforce
Email	john234@gmail.com	Profile	Marketing User
Username	john@company.com	Active	✓
Nickname	User168092519874397111810 ℹ	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	ℹ
Manager		Accessibility Mode (Classic Only)	☐ ℹ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐ ℹ
Federation ID		High-Contrast Palette on Charts	☐ ℹ
App Registration: One-Time Password Authenticator	ℹ	Load Lightning Pages While Scrolling	✓ ℹ
App Registration: Salesforce Authenticator	ℹ	Salesforce CRM Content User	✓
Security Key (U2F or WebAuthn)	ℹ	Receive Salesforce CRM Content Email Alerts	✓

Activity 6:

Reports and dashboards:

1 .From the Reports tab, click New Reports,

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.

🏠 🔒 develop.lightning.force.com   [17]   ⋮

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Q Search...

▦ **Sales**   Home   Opportunities ∨   Leads ∨   Tasks ∨   Files ∨   Accounts ∨   **Reports** ∨   More ▾   ✎

Reports
Recent
2 items

Q Search recent reports...   [New Report] [New Folder] ⚙▾

REPORTS	Report Name ∨	Description ∨	Folder ∨	Created By ∨	Created On ∨	Subscribed
Recent	New Accounts Report		Private Reports	Mareeswari V	8/4/2023, 7:20 pm	
Created by Me	New Accounts Report		Private Reports	Mareeswari V	8/4/2023, 7:17 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Activity 7:

Create a Dashboards tab.

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 Chat and click Add.
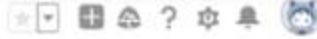7. Click Save.

8. Click Done

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Sales　Home　Opportunities ⌄　Leads ⌄　Tasks ⌄　Files ⌄　Accounts ⌄　**Dashboards** ⌄　More ▾

Dashboard
Candidate Board
⚠ Last refreshed 1 day ago. Refresh this dashboard to see the latest data.
As of 09-Apr-2023, 11:26 am Viewing as Mareeswari V

Refresh　Edit　Subscribe ▾

New Accounts Report　⛶

We can't draw this chart because there is no data.

View Report (New Accounts Report)

New Accounts Report　⛶

We can't draw this chart because there is no data.

View Report (New Accounts Report)

Trailhead   profile public URL

Team Lead-http://trailblazer.me/id/marev36

Team Member 1-htts://trailblazer.me/id/natcn

Team Member 2-htts://trailblazer.me/id/nithe58

Team Member 3-htts://trailblazer.me/id/pandr169

ADVANTAGES & DISADVANTAGES

Advantages:

   . Having huge amounts of data on customer interactions enables an organization to built up a clear picture of its customers.

   .It allows for deep insights to built up a clearer picture of its customers.

   .the CRM software also lets a business tailor its marketing communications to achieve more effective results and,hence,a greater return on investment in sales and marketing.

Disadvantages:

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

   .Security concerns associated with centralized data.

   .It requires a process-driven sales organization.

Application:

      By intelligently storing and managing your customers information, a CRM system increases the number of leads coming in,helping your marketing team find new customers faster. It supports your sales teams in closing more deals faster. It also enhances customer service.

Conclusion:

      CRM in retails allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases.

Future Scope:

      Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of customer relationship management software. It is really the future of business.

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