

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

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## 1 . INTRODUCTION :

### OVERVIEW :

Salesforce is the world's number one Customer Relationship Management (CRM) platform .The improved features of CRM software have increased both it's complexity and necessity.

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 aims to produce areal time knowledge of the salesforce and how can we build a App using salesforce in this project . We can build a candidate result card application for educational institutions.

The purpose of the project is to manage the school students result tracking process in the easy way. It saves a lot of time . Can work easily and Increase candidate quality .

## 2 . LITERATURE SURVEY :

### EXISTING PROBLEM :

1. Getting approval from management.

2. Handling data security.
3. Leaving favoured programs and software behind.
4. Dealing with the time and cost of CRM Implementation.
5. Choosing the wrong CRM.
6. Lacking Scope Clarity
7. Managing Integrations .

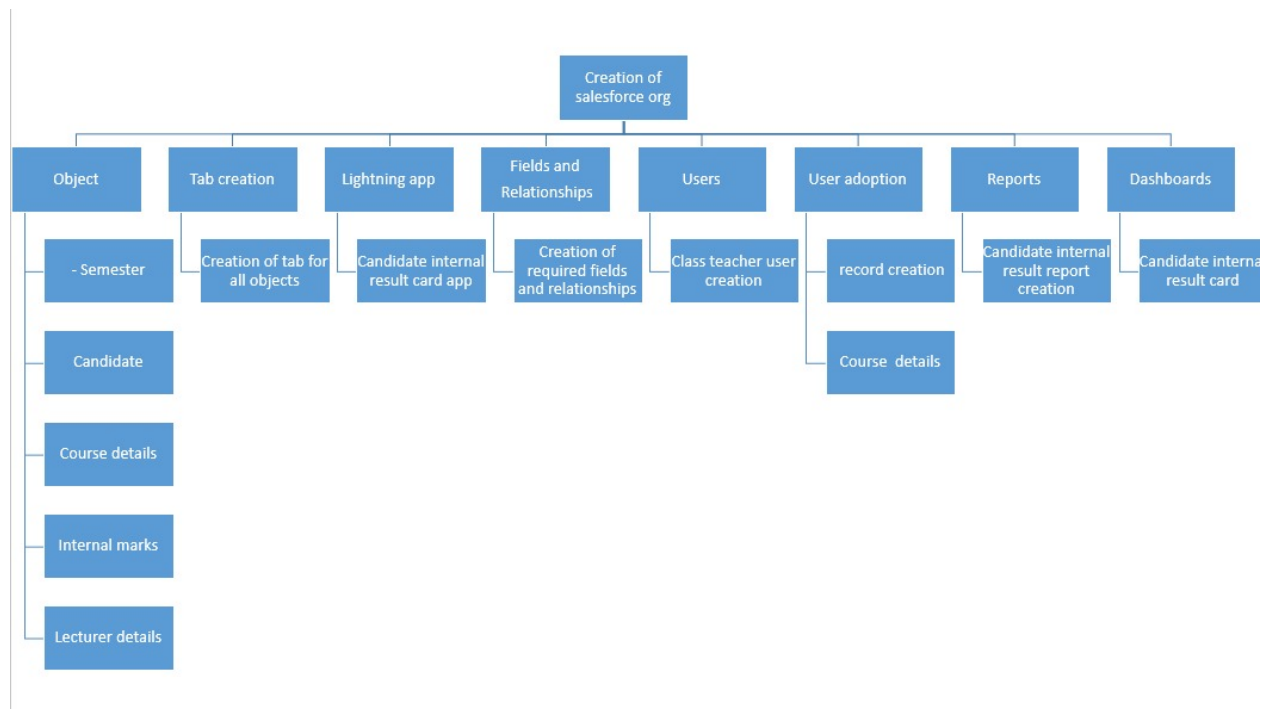
### PROPOSED SOLUTION :

. Quite often , the reason that people struggle with migration to cloud based tech solutions that the company doesn't have a clearly defined CRM strategy for the changes ahead .

This needs to be encouraged from the top down.By learning as a team to help one another upskill on the new processes and CRM functionalities your company can move forward as one.

### 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.

Hardware requirements;

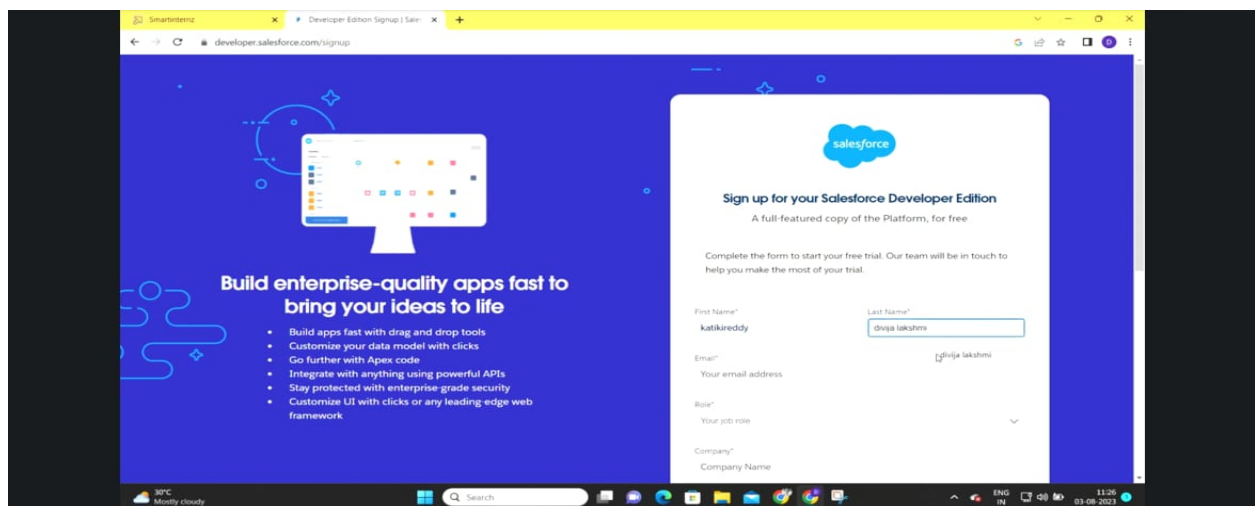
- Wireless adopter(wifi)
- Hard drive : minimum 32GB
- Memory
- Sound card/speakers

Software requirements:

- Used CHROME website to complete this project and also mobile apps are used and word processing software.

## 4. RESULT :

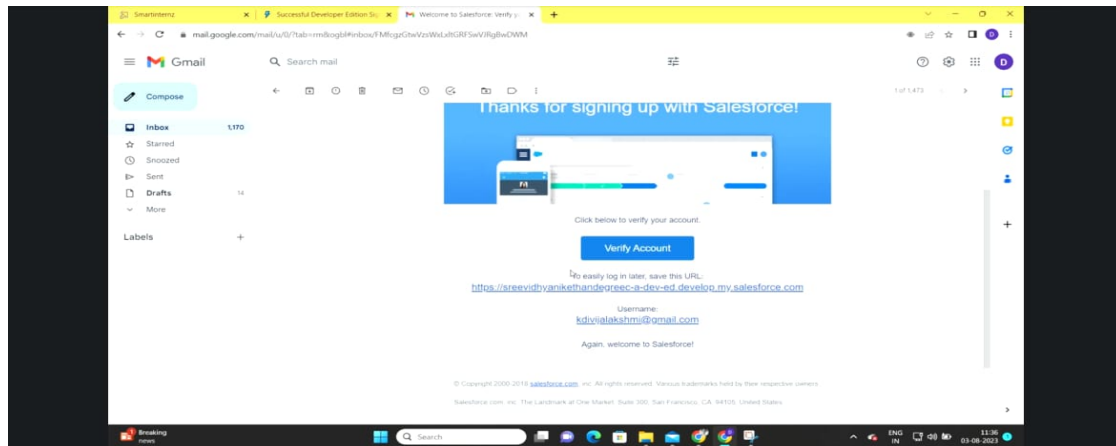
### # Create Salesforce Org :



Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/Signup](https://developers.salesforce.com/Signup)
2. Click on sign up.

## Account Activation



Click on the verify account to activate your account.

## Login to Your Salesforce Account

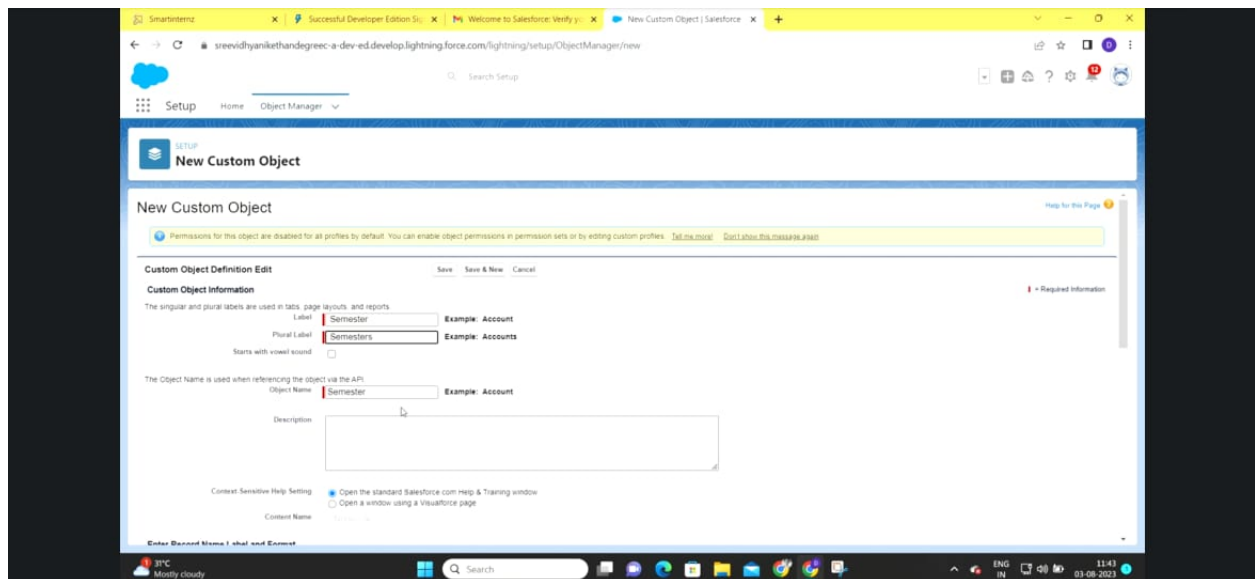
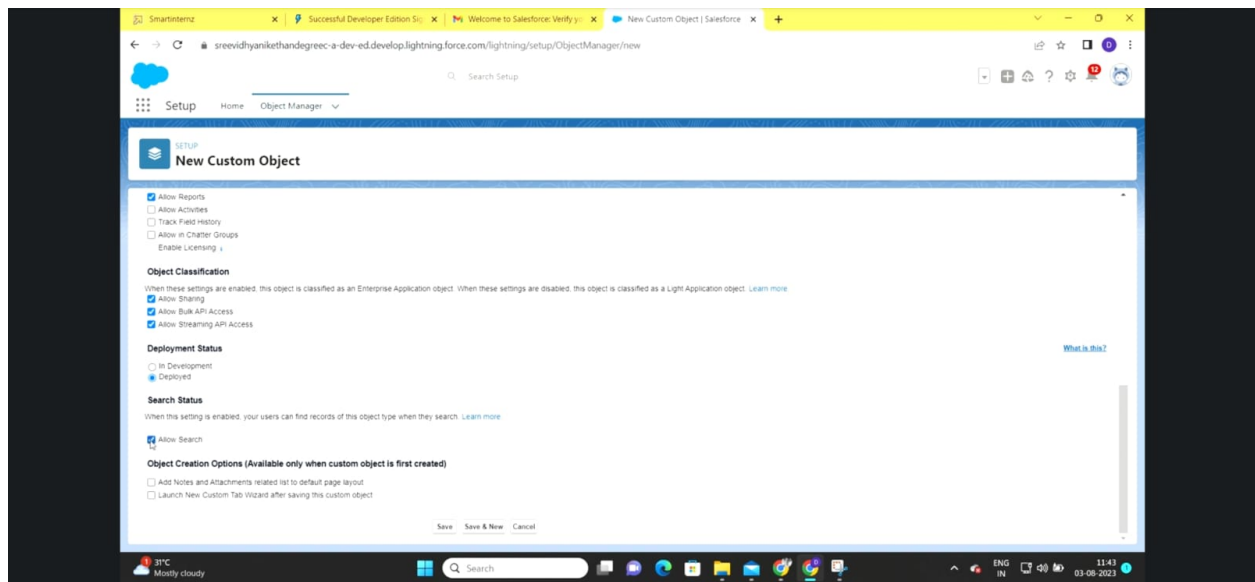
By Entering the ID and password we can login into the Salesforce account.

### # Object

\* Salesforce objects are database tables that permit you to store data that is specific to an organization.

\* Salesforce objects are of two types:

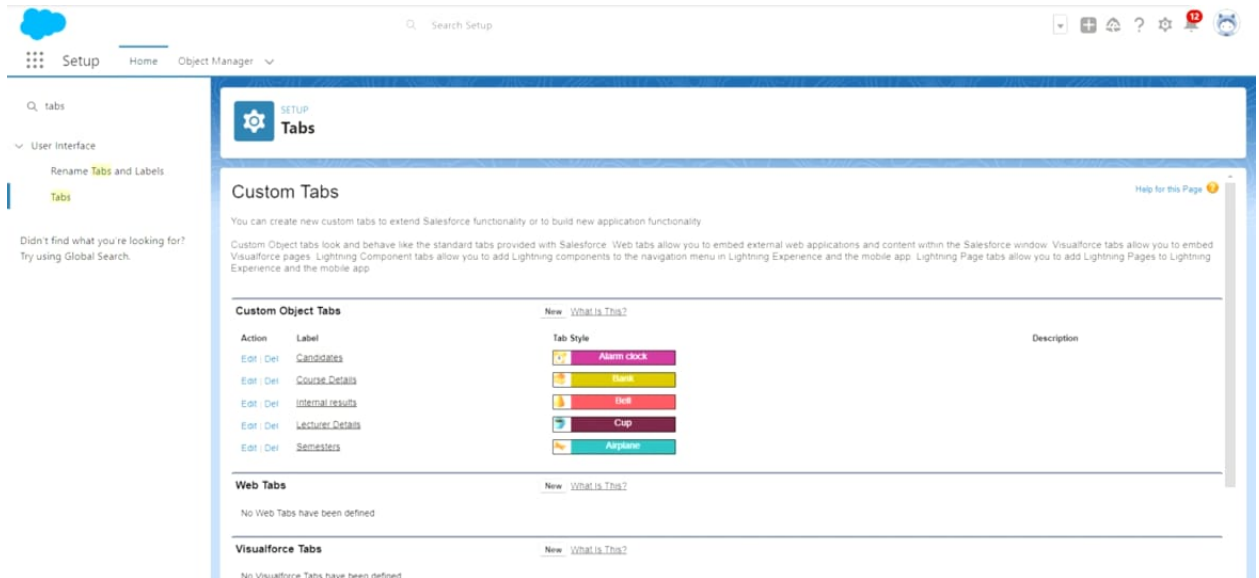
1. Standard Objects:
2. Custom Objects



1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object

## # WHAT IS TAB?

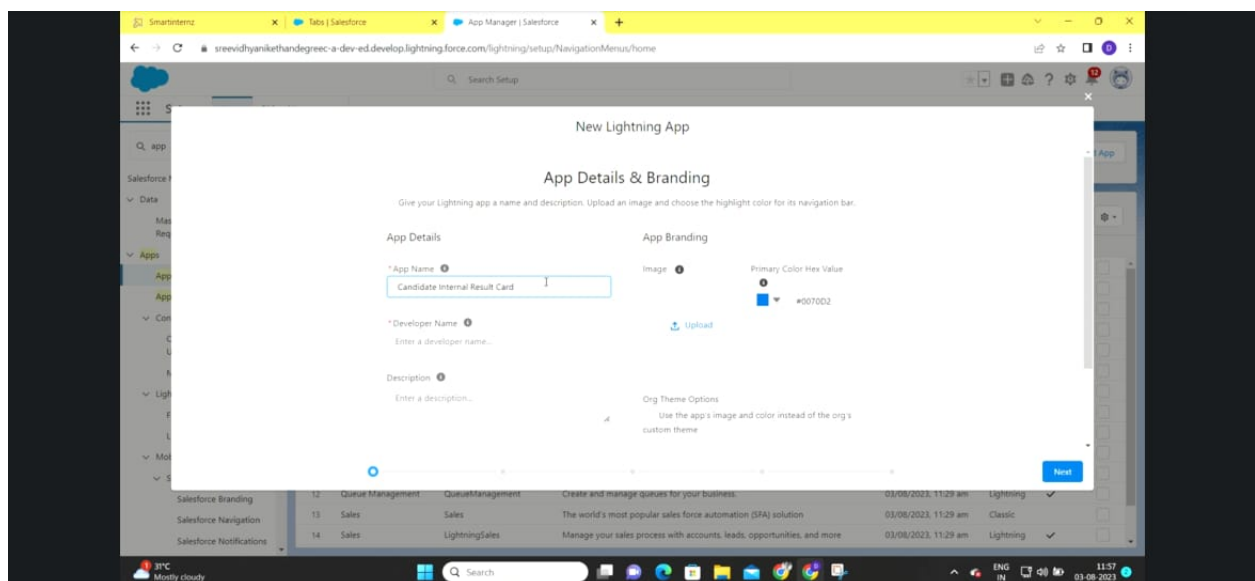
Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.



1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Semester.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save

## # 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.



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.

## # Fields And Relationship :

Fields - Fields store data values that are required for a particular object in a record.

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.

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Course' object. The page is titled 'New Custom Field' and is at 'Step 2: Enter the details'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area has the following fields:

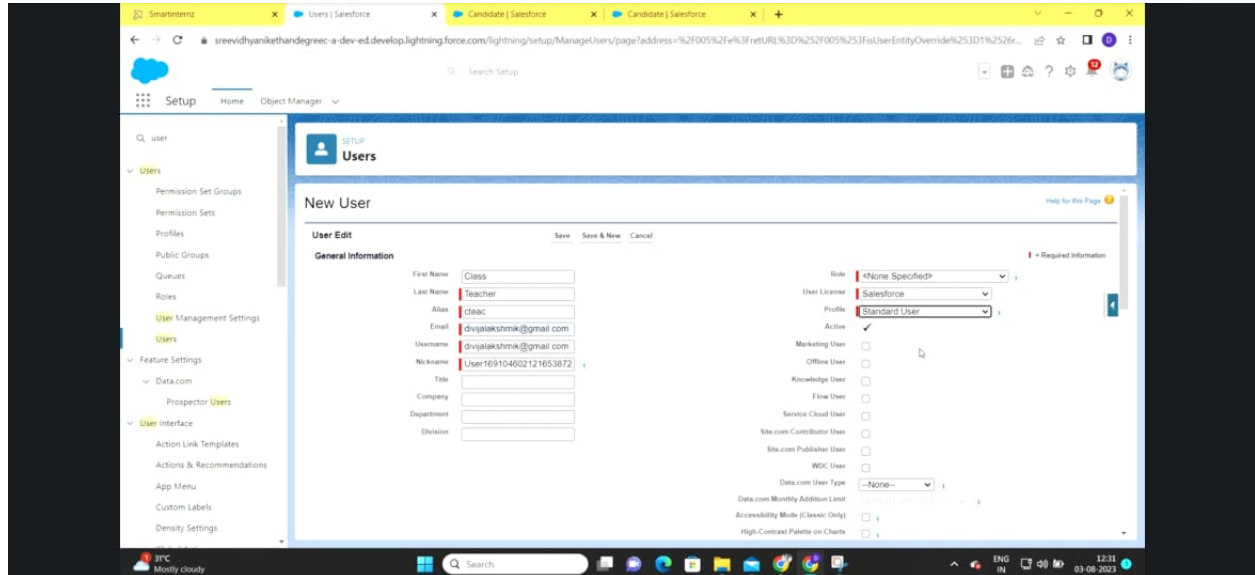
- Field Label:
- Length:  (Number of digits to the left of the decimal point)
- Decimal Places:  (Number of digits to the right of the decimal point)
- Field Name:
- Description:
- Help Text:
- Required: ☐ Always require a value in this field in order to save a record
- Unique: ☐ Do not allow duplicate values
- External ID: ☐ Set this field as the unique record identifier from an external system
- AI Prediction: ☐ Use this field to store AI prediction scores
- Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Internal results' object. The page is titled 'New Custom Field' and is at 'Step 2: Choose output type'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area has the following fields:

- Field Label:
- Field Name:
- Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity
- Formula Return Type:
  - ☒ None Selected
  - ☐ Checkbox
  - ☐ Currency
  - ☐ Date
  - ☐ DateTime
  - ☐ Number
  - ☐ Percent
- Select one of the data types below:
  - Calculate a boolean value. Example:  $(TODAY() > CloseDate)$
  - Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example:  $(Share\ Margin\ \% \times Amount) \times CASH\_USD$
  - Calculate a date, for example, by adding or subtracting days to other dates. Example:  $(Remember\ Date + CloseDate) - 7$
  - Calculate a datetime, for example, by adding a number of hours or days to another datetime. Example:  $(Next\ %\ NOPT) \times 1$
  - Calculate a numeric value. Example:  $(Fahrenheit \times 1.8) \div Celsius\_C + 32$
  - Calculate a percent and automatically add the percent sign to the number. Example:  $(Revenue\ \$ \times 100) \div Revenue\ \$ \times 100$

## # 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.

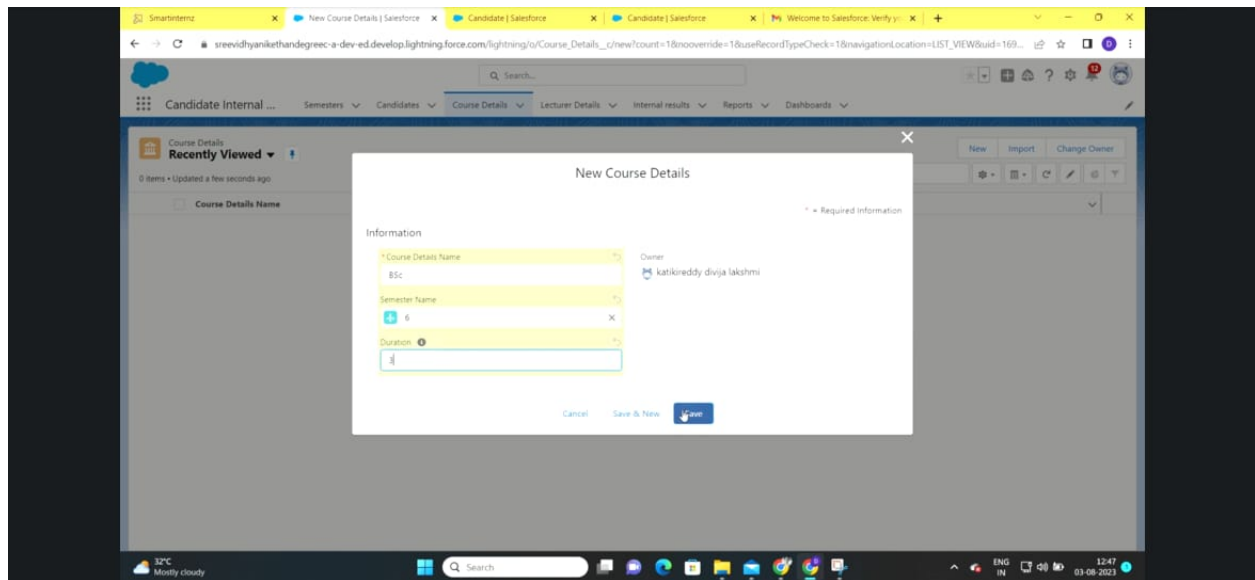


Created an new users.

## # User Adoption :

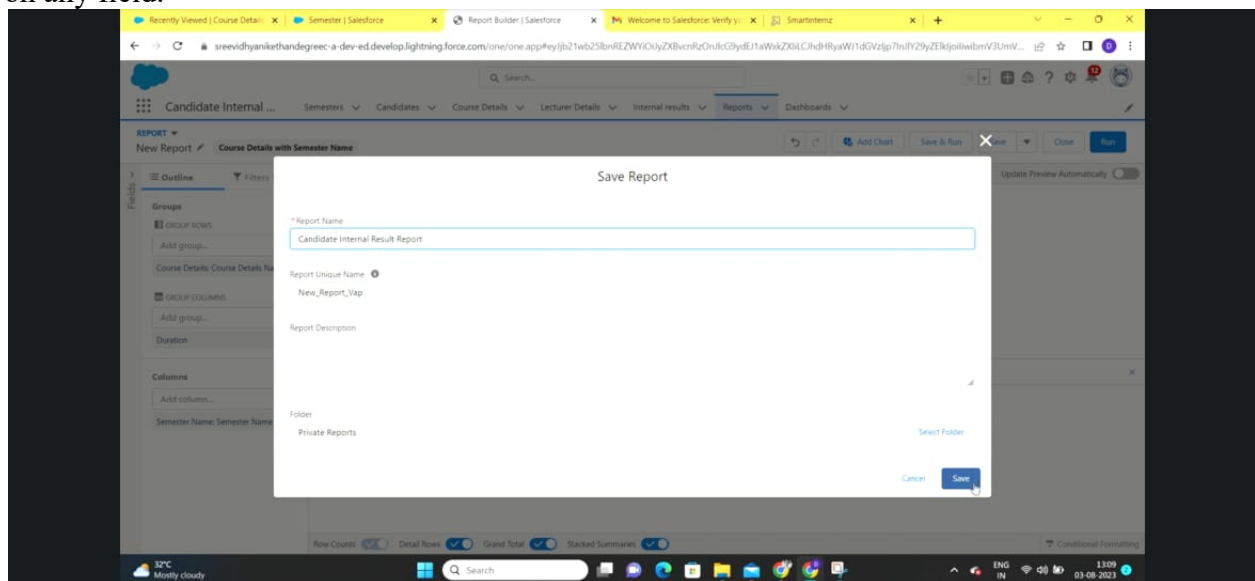
Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.





## # What Are Reports?

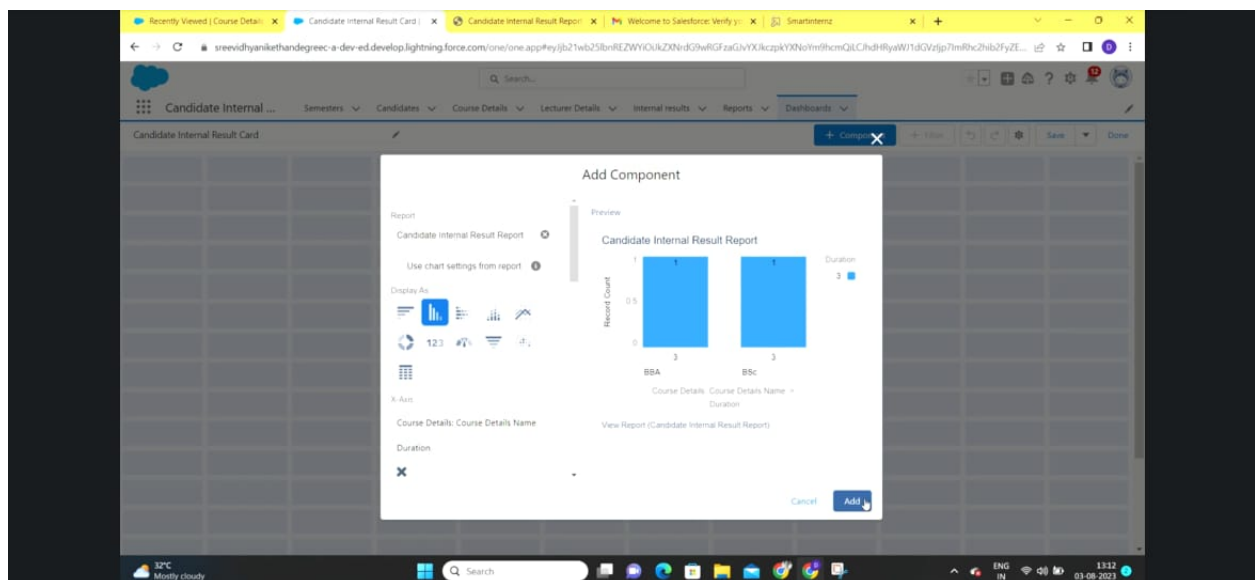
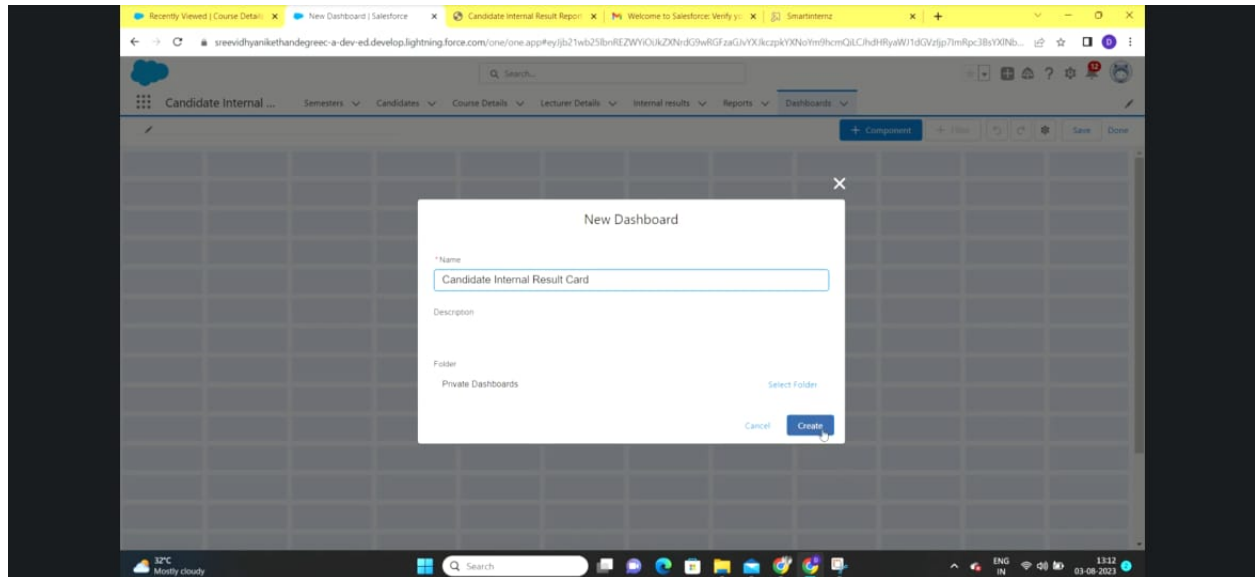
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

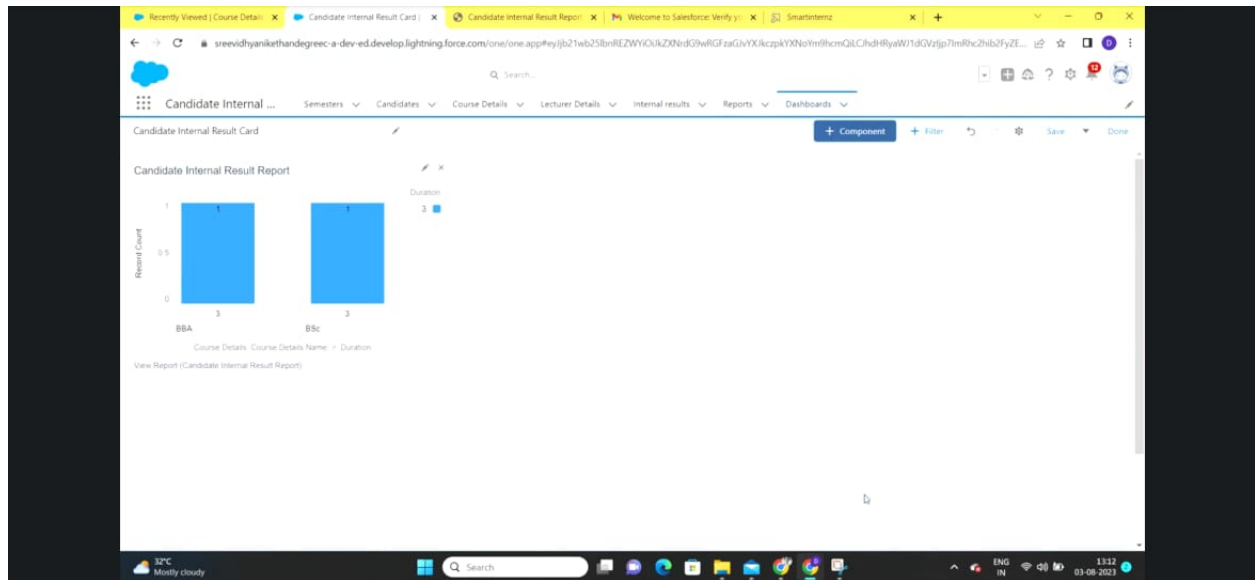


From the report tap we have created report type by clicking on candidate internal result report and see records.

## # 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.





Dashboards tab from the Candidate Internal Result Card application.

Data visualization select any of the chart, table etc.

The given information is visualized in charts .

## 5.ADVANTAGES AND DISADVANTAGES

### ADVANTAGES :

- It allows for the consolidation of customer data and the basis for deep insights.
- Implementing CRM in results tracking with internal marks will help you streamline this process.
- It speeds up the sales conversion process.
- It increases staff productivity ,lowering time cost .
- Improves customer experience by allowing personalization and improved query resolution.

### DISADVANTAGES:

- Software subscription or purchase fees .
- Poor user adoption (Business risk).
- Turnover of critical project resources .
- Issues with Customizations.

## 6. APPLICATIONS :

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

- \* It can be used in both schools and colleges.

- \* Target Marketing.

- \*In schools and colleges even in Universities ,it would be very useful in monitoring students performance and results.

- \*Can work easily.

## 7.CONCLUSION :

- \*CRM really comes down really down to this –it is a way to store the sort to information that adds value for your customers when they do business with you.

- \*You must be committed to the process.

- \*With a solid CRM system ,you can create a customers you get more business.

- \*CRM requires a cultural change with organization.

## 8. FUTURE SCOPE :

- \* CRM is concerned with the development and maintainance of mutually beneficial relationships with strategically significant partners.

- \* It is focus on the Creation of Long term value,and not just short term profits , for the company and all it works with.

- \*Four main constituencies of a focal organizations network are suppliers owners parents and Employees.

- \*Build Long term and profitable relationship with choosen customers.