

## PROJECT REPORT TEMPLATE

<b>TEAM ID</b>	<b>67A5D2A7A1AD5FEA1E14B</b> <b>1256FA4E698</b>
<b>PROJECT NAME</b>	<b>IMPLEMENTING CRM FOR RESULT</b> <b>TRACKING OF A CANDIDATE WITH</b> <b>INTERNAL MARKS</b>
<b>TEAM LEADER</b>	<b>RESHMA . R</b>
<b>TEAM MEMBER</b>	<b>KOWSIKA . K</b> <b>MAHALAKSHMI . G</b> <b>MANIMALA . K</b>

# **PROJECT REPORT TEMPLATE**

## **1.INTRODUCTION :**

### **1.1.Overview**

#### **IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDAT E WITH INTERNAL MARKS**

- ✓ The CRM concept has evolved in such a way that nowadays, it must be viewed

as a strategy to maintain a long term relationship with the customer.

- ✓ That a CRM will help you manage customer relationship and maybe a general

Idea of CRM functions. Many companies are either planning or in the process of

Implementing CRM systems.

### **1.2.Purpose**

- ✓ Improve decision making and sales strategizing with powerful insights.
- ✓ Information about customers is stored in disparate applications as the employee

Empowerment is very high.

- ✓ Implementation involved reviewing the resource requirements and availability
- ✓ Both in terms of hardware and software

## **2.PROBLEM DEFINITION &DESIGN THINGING**

# Empathy map



## Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.



### Build empathy

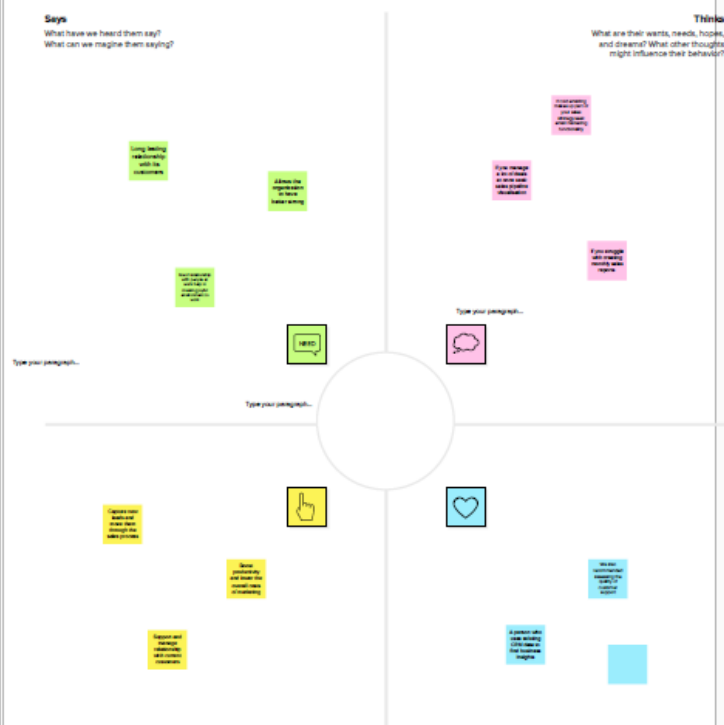
The information you add here should be representative of the observations and research you've done about your users.

#### Says

What have we heard them say?  
What can we imagine them saying?

#### Thinks

What are their wants, needs, hopes,  
and dreams? What other thoughts  
might influence their behavior?



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## 2.2.Ideation & Brainstorm map

**Brainstorm & idea prioritization**

Use this workspace to your own brainstorming sessions as your team can connect their imagination and brainstorming concepts even if you're not sitting in the same room.

1. Define a concept  
2. Share a solution  
3. Develop a solution

**Define your problem statement**

What problem are you trying to solve? How can you solve it? What are the key challenges? The solution is your problem statement.

**Evaluate**

What are your ideas for solving the problem? How can you solve it? What are the key challenges? The solution is your problem statement.

**Group ideas**

Take your ideas and group them into clusters. What are the key challenges? The solution is your problem statement.

**Prioritize**

What are the most important ideas? How can you solve it? What are the key challenges? The solution is your problem statement.

**Collaborate**

How can you solve it? What are the key challenges? The solution is your problem statement.

**Keep working smart**

How can you solve it? What are the key challenges? The solution is your problem statement.

## 3. RESULT

## 3.1.DATA MODEL

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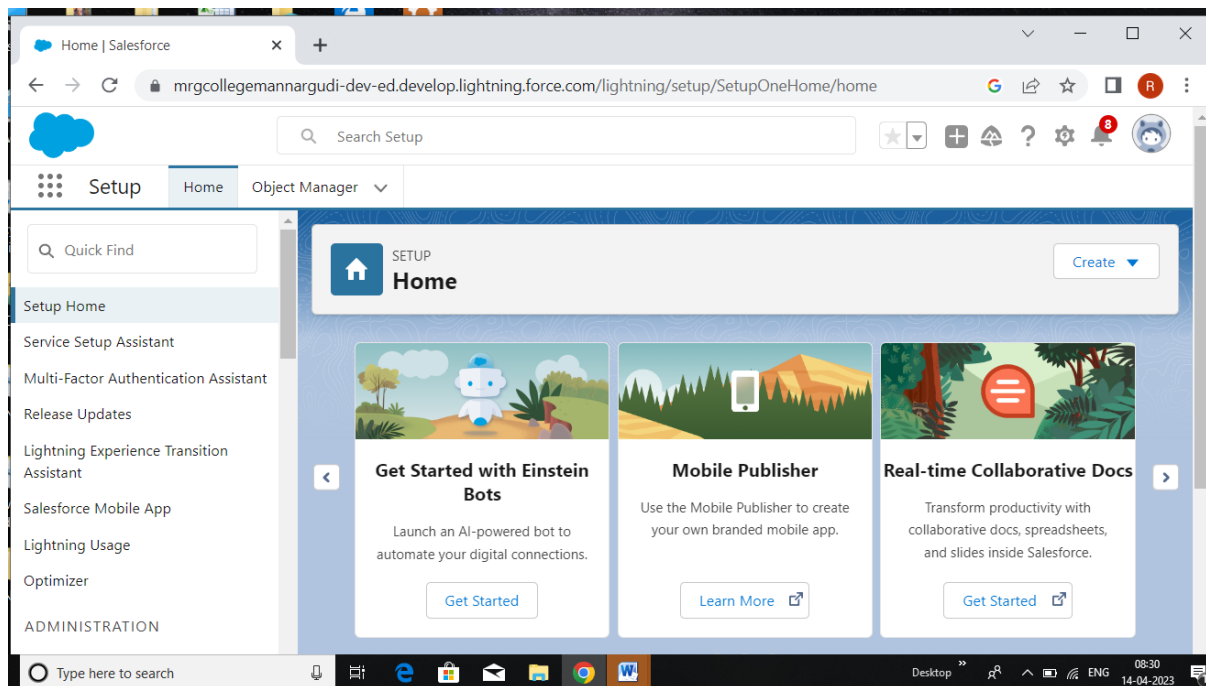
OBJECT NAME	FIELDS IN THE OBJECT	
	FIELD LABEL	DATA TYPE
SEMESTER	Semester name	text
	Course	Course (lookup)
CANDIDATE	Candidate name	text
	Candidate ID	text
	Semester name	text
	Internal results	Text
CANDIDATE DETAILS	Course name	Text
	Course ID	Text

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LECTURER DETAILS	Lecturer Role	Text
	Lecturer name	Text
INTERNAL MARKS	Candidate ID	Text
	Course ID	Text
	Marks	Number

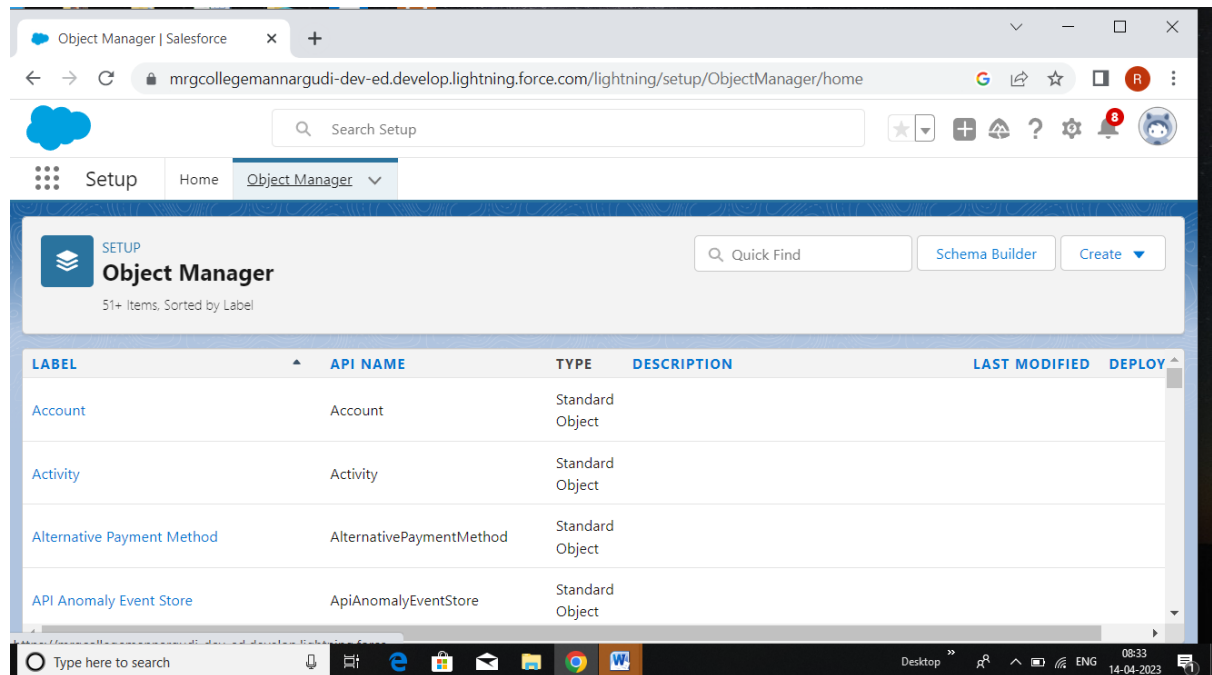
### 3.2.Activity & screenshot

#### MILESTONE 1 :



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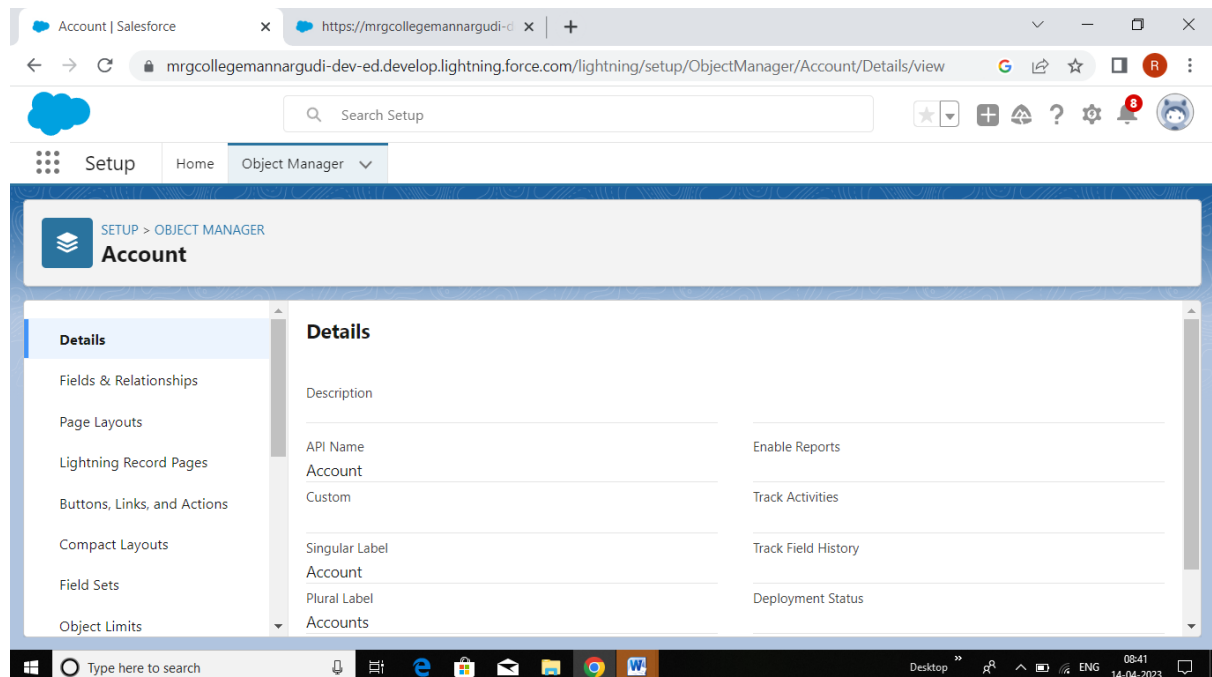
## MILESTONE 2 :



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area features a 'SETUP Object Manager' header with a 'Quick Find' search bar, 'Schema Builder' button, and 'Create' dropdown. Below this is a table listing objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOY
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			

## MILESTONE 3 :



The screenshot shows the Salesforce Object Manager 'Account' details page. The browser address bar displays the URL: `https://mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/Details/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area features a 'SETUP > OBJECT MANAGER Account' header. On the left is a sidebar with navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area displays the 'Details' section for the 'Account' object.

Details	
Description	
API Name	Account
Enable Reports	
Custom	
Track Activities	
Singular Label	Account
Track Field History	
Plural Label	Accounts
Deployment Status	

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semester internal marks | Salesforce x https://mrgcollegemannargudi-d x +

mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XoFw/Detail...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## semester internal marks

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Details

Description

API Name

semester\_internal\_marks\_c

Custom

✓

Singular Label

semester internal marks

Plural Label

semester internal marks

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Edit Delete

Type here to search

Desktop 08:57 14-04-2023

## MILESTONE 4:

Object Milestone | Salesforce x https://mrgcollegemannargudi-d x +

mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/EntityMilestone/FieldsAn...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Object Milestone

Details

Fields & Relationships

Page Layouts

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Object Milestone

### New Custom Field

Step 2. Enter the details

Step 2 of 4

Field Label

semester internal marks

Display Format

Example: A-{0000} What Is This?

Starting Number

1

Generate Auto Number for existing records

Field Name

semester\_internal\_marks

Previous Next Cancel

Type here to search

Desktop 09:05 14-04-2023



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Object Milestone | Salesforce x https://mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/EntityMilestone/FieldsAn...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Object Milestone

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Flow Triggers

Validation Rules

### Fields & Relations

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

22 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Business Hours	BusinessHoursId	Lookup(Business Hours)		
Completed	IsCompleted	Checkbox		
Completion Date	CompletionDate	Date/Time		
Elapsed Time (Days)	ElapsedTimeInDays	Number(4, 2)		
Elapsed Time (Hours)	ElapsedTimeInHrs	Number(4, 2)		
Elapsed Time (Mins)	ElapsedTimeInMins	Number(9, 0)		

Type here to search

Desktop 09:07 14-04-2023

## MILESTONE 5 :

Object Milestone | Salesforce x https://mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/EntityMilestone/FieldsAn...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Object Milestone

Details

**Fields & Relationships**

Page Layouts

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

### Fields & Relations

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

22 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Business Hours	BusinessHoursId	Lookup(Business Hours)		
Completed	IsCompleted	Checkbox		
Completion Date	CompletionDate	Date/Time		
Elapsed Time (Days)	ElapsedTimeInDays	Number(4, 2)		
Elapsed Time (Hours)	ElapsedTimeInHrs	Number(4, 2)		
Elapsed Time (Mins)	ElapsedTimeInMins	Number(9, 0)		

Type here to search

Desktop 09:05 14-04-2023

## MILESTONE 6 :

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The screenshot shows the Salesforce Object Manager setup page for the 'semester' object. The browser address bar displays the URL: `https://mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XoFm/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Details' and contains a table with the following information:

Field	Value
Description	
API Name	semester__c
Custom	✓
Singular Label	semester
Plural Label	semesters
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed

The bottom of the screen shows the Windows taskbar with the search bar and several application icons.

## MILESTONE 7:

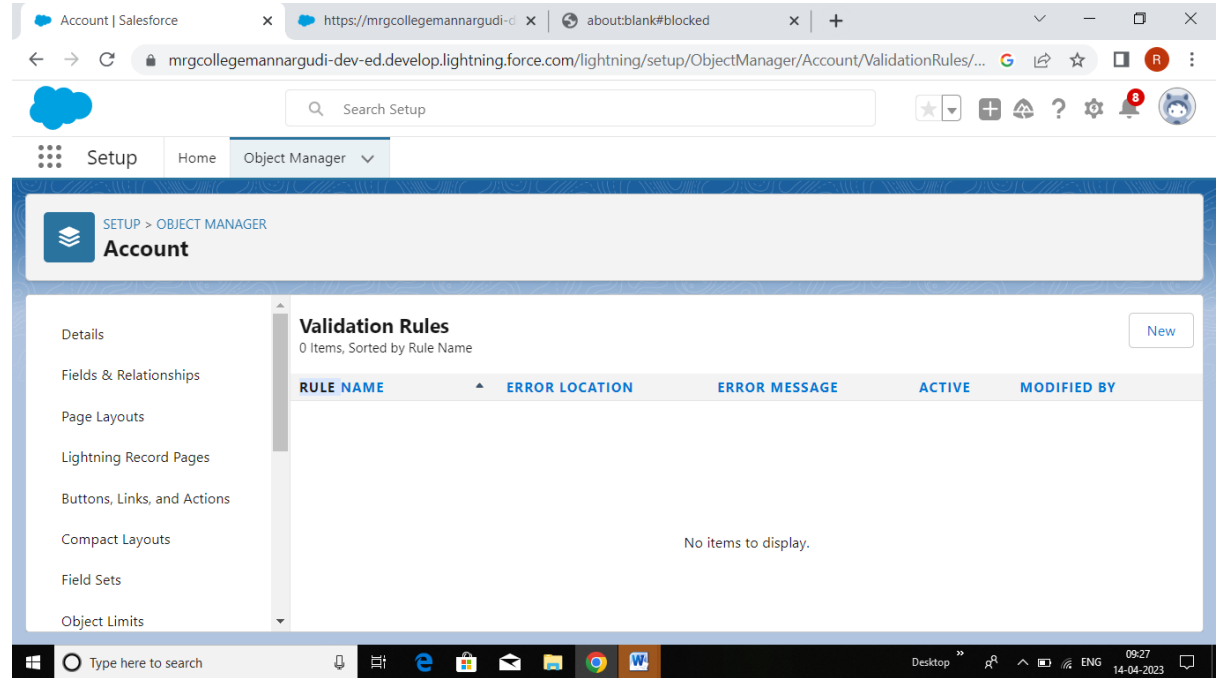
The screenshot shows the Salesforce Object Manager setup page for the 'Account' object, specifically the 'Page Layouts' section. The browser address bar displays the URL: `https://mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/PageLayouts/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Page Layouts' and contains a table with the following information:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Support) Layout	Reshma R, 12/03/2023, 4:27 pm	Reshma R, 12/03/2023, 4:27 pm

The bottom of the screen shows the Windows taskbar with the search bar and several application icons.

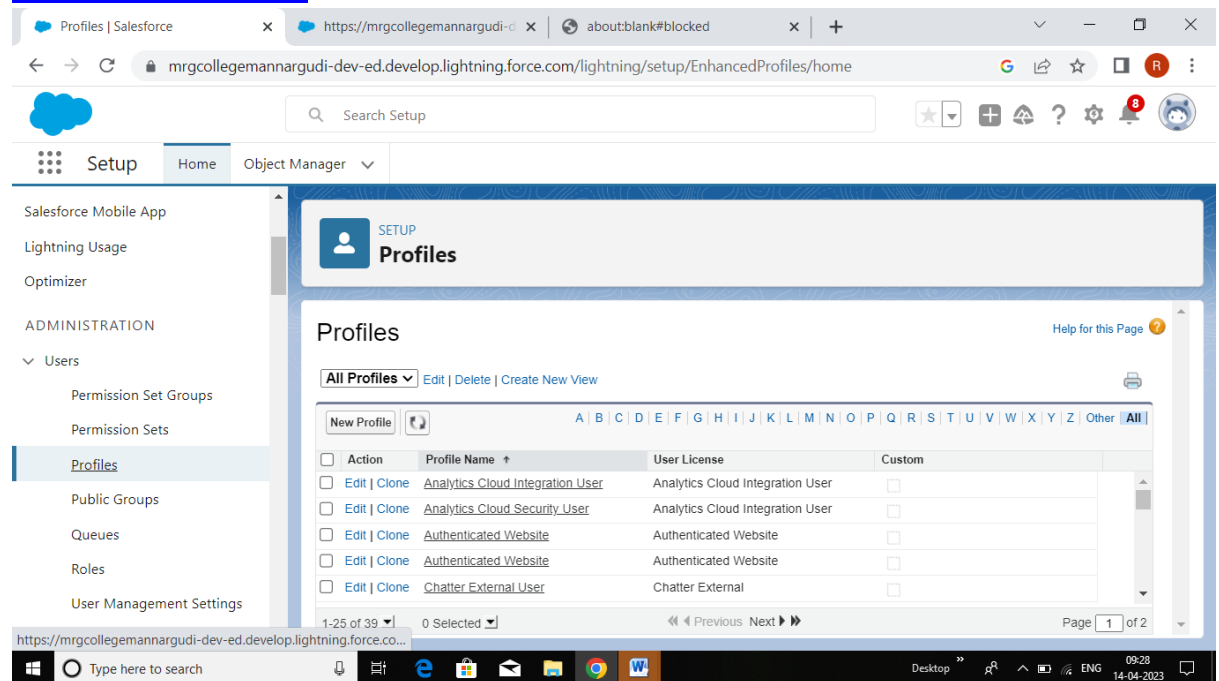
## MILESTONE 8:

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The screenshot shows the Salesforce Setup interface for the 'Account' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Validation Rules' and shows '0 Items, Sorted by Rule Name'. A table with columns 'RULE NAME', 'ERROR LOCATION', 'ERROR MESSAGE', 'ACTIVE', and 'MODIFIED BY' is displayed, but it is empty with the message 'No items to display.' A 'New' button is in the top right corner. The browser address bar shows the URL: 'mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/...'. The system status bar at the bottom shows the date '14-04-2023' and time '09:27'.

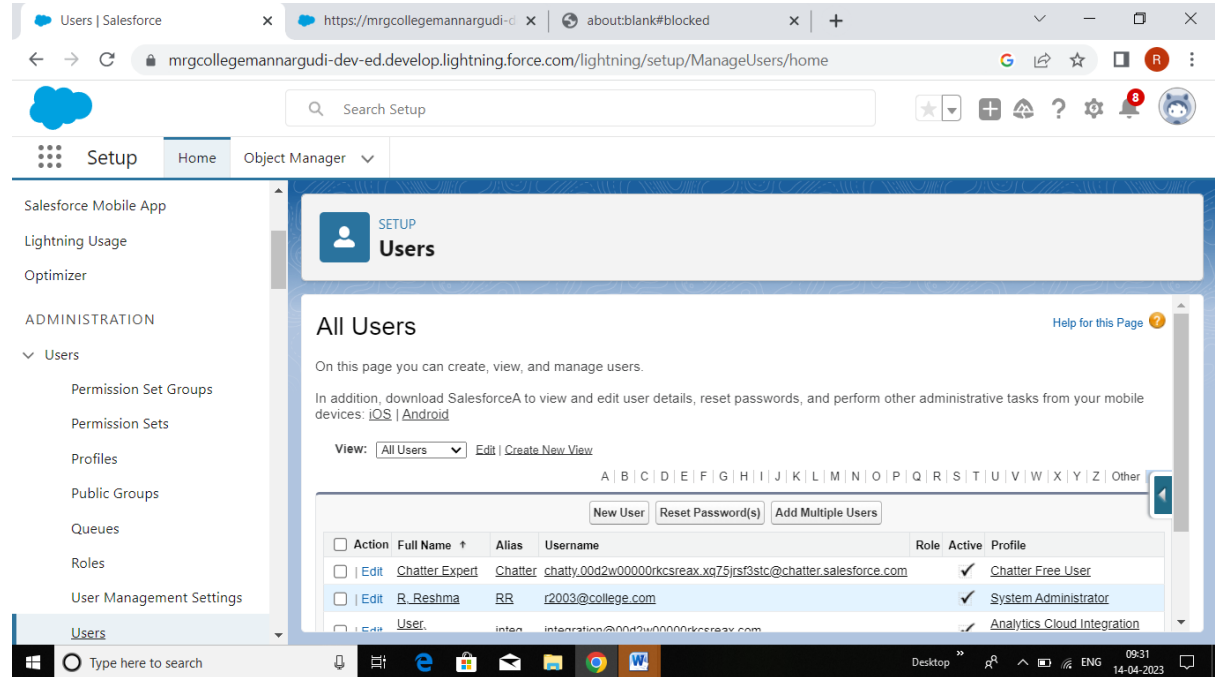
## MILESTONE 9 :



The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a navigation menu with options: Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Profiles' and shows a list of profiles. A table with columns 'Action', 'Profile Name', 'User License', and 'Custom' is displayed. The table contains five rows of profiles: 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticated Website', and 'Chatter External User'. A 'New Profile' button is in the top left corner. The browser address bar shows the URL: 'mrgcollegemannargudi-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home'. The system status bar at the bottom shows the date '14-04-2023' and time '09:28'.

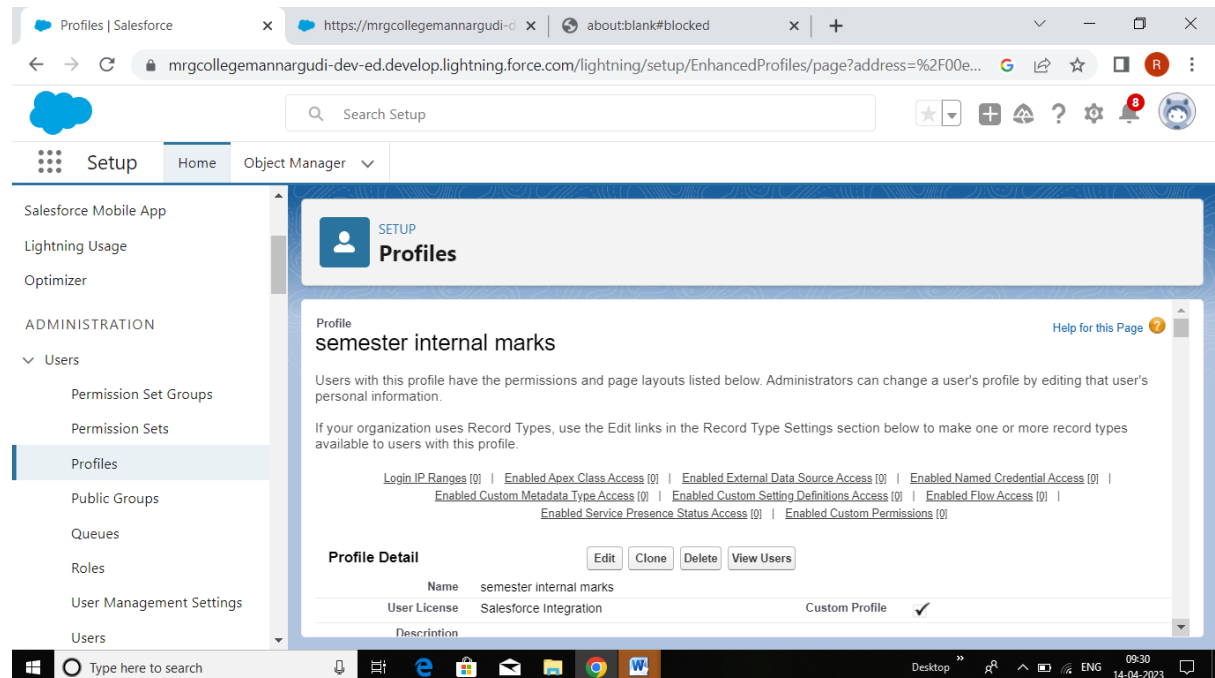
## MILESTONE 10 :

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The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. The 'Users' section is expanded, showing links to Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Two users are listed: 'Chatter Expert' (Chatter, chatter.00d2w00000rkcsreax.xg75jrsf3stc@chatter.salesforce.com, Chatter Free User) and 'R\_Reshma' (RR, r2003@college.com, System Administrator). Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

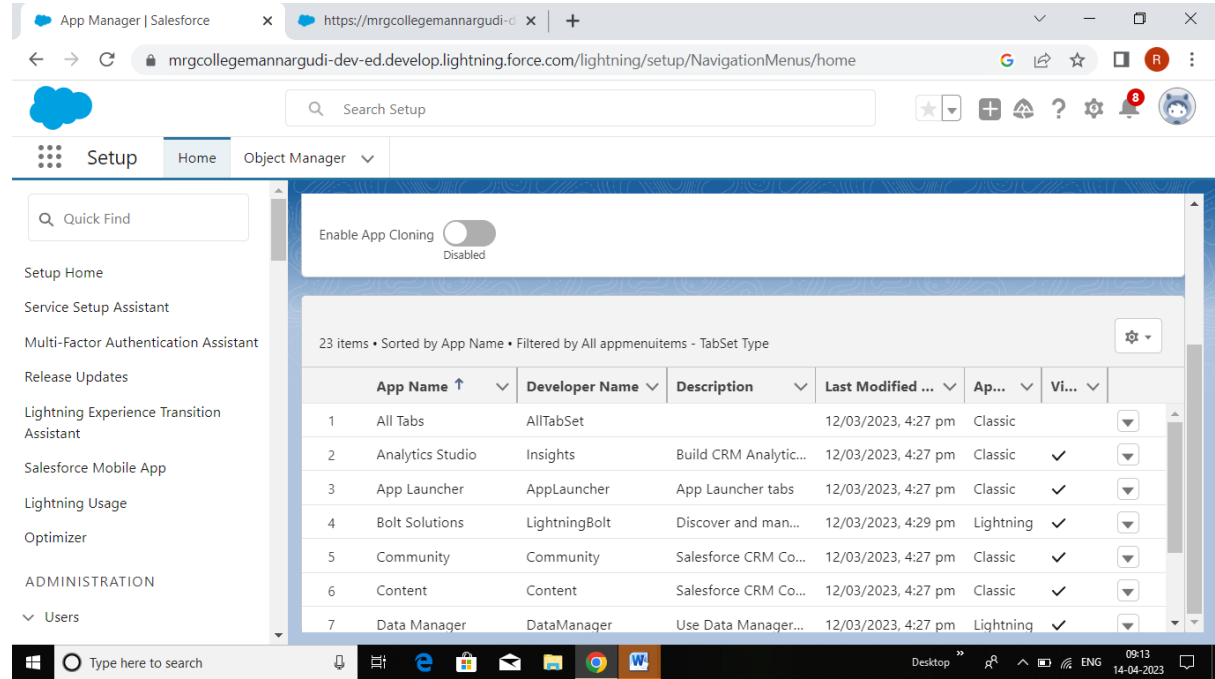
## MILESTONE 11 :



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar is the same as in the previous screenshot, with 'Profiles' highlighted under the 'Users' section. The main content area is titled 'Profiles' and shows the details for a profile named 'semester internal marks'. It includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' Below this, it states: 'If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' A list of permissions is shown: 'Login IP Ranges (0)', 'Enabled Apex Class Access (0)', 'Enabled External Data Source Access (0)', 'Enabled Named Credential Access (0)', 'Enabled Custom Metadata Type Access (0)', 'Enabled Custom Setting Definitions Access (0)', 'Enabled Flow Access (0)', 'Enabled Service Presence Status Access (0)', and 'Enabled Custom Permissions (0)'. Below the permissions is a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The details show the Name as 'semester internal marks', the User License as 'Salesforce Integration', and the Custom Profile checkbox checked. The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

## MILESTONE 12 :

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The screenshot displays the Salesforce App Manager interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. The main content area shows a toggle for 'Enable App Cloning' (Disabled) and a table of 23 items. The table is sorted by App Name and filtered by All appmenuitems - TabSet Type. The table columns are App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists 7 items, all with a last modified date of 12/03/2023, 4:27 pm.

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		12/03/2023, 4:27 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytic...	12/03/2023, 4:27 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	12/03/2023, 4:27 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and man...	12/03/2023, 4:29 pm	Lightning	✓
5	Community	Community	Salesforce CRM Co...	12/03/2023, 4:27 pm	Classic	✓
6	Content	Content	Salesforce CRM Co...	12/03/2023, 4:27 pm	Classic	✓
7	Data Manager	DataManager	Use Data Manager...	12/03/2023, 4:27 pm	Lightning	✓

## 4. TRAILHEAD PROFILE PUBLIC URL

Team lead : <https://trailblazer.me/id/reshr20>

Team member 1 : <https://trailblazer.me/id/mkrish20>

Team member 2 : <https://trailblazer.me/id/mahag11>

Team member 3 : <https://trailblazer.me/id/kowsk11>

## **5.ADVANTAGES**

- ✓ 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.

## **DISADVANTAGES**

- ✓ 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.

## **6.APPLICATIONS**

- ✓ Focus on mobility and ease of use.
- ✓ Choose a system that works well with other technology.
- ✓ Research for CRM that perfectly fit your firm.
- ✓ Pinpoint which features and functionality you

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need.

- ✓ Set out your goals and objectives.

### **7.CONCLUSION**

✓ CRM enables a company foaling its strategy with the needs of the customer on order to best meet those needs and thus ensure long term customer loyalty.

### **8.FUTURE SCOPE**

✓ Customer 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 CRM software it is really the Future of business.

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