

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

### Introduction:

#### 1.1 Overview

This process for helping implementing CRM for result tracking of a candidate with internal marks.

#### 1.2 Purpose

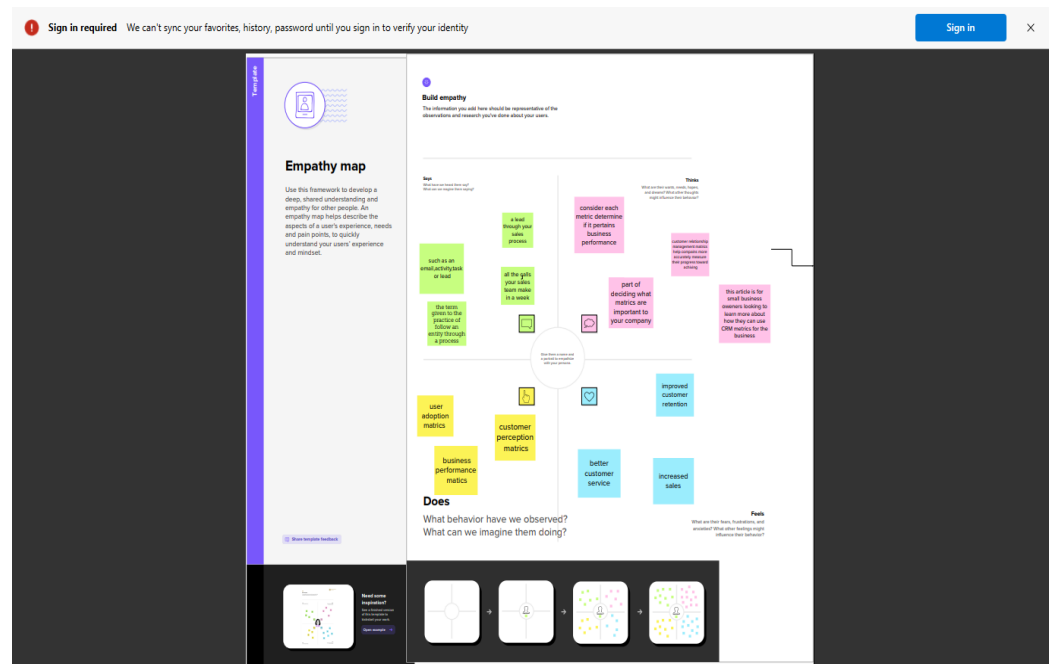
The use of this implementing a CRM system is a value - adding process that can bring great benefits to any business sales force. The ultimate goal is to improve communication and interaction with real customers and leads sales force.

## 2 Problem Definition & Design Thinking

### Empathy Map:

An empathy map is a collaborative tool teams can use to gain a deeper insight in to their customers in sales force.

Paste the empathy map screenshot:

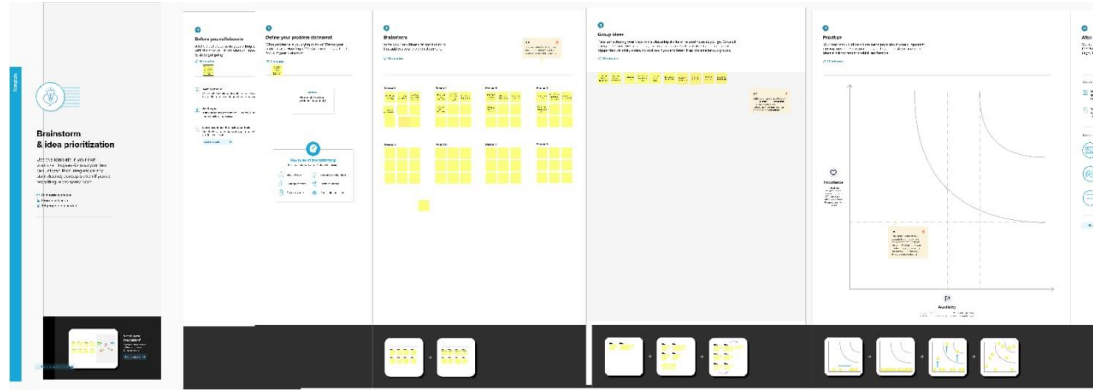


### Ideation & Brainstorming Map :

A mind map is a great tool for brainstorming new ideas . its unstructured format allows ideas and thoughts to flow freely . since concepts are placed in groupings.

Paste the Ideation & brainstorming map screenshot :

# Project Report Template



## 3 RESULT

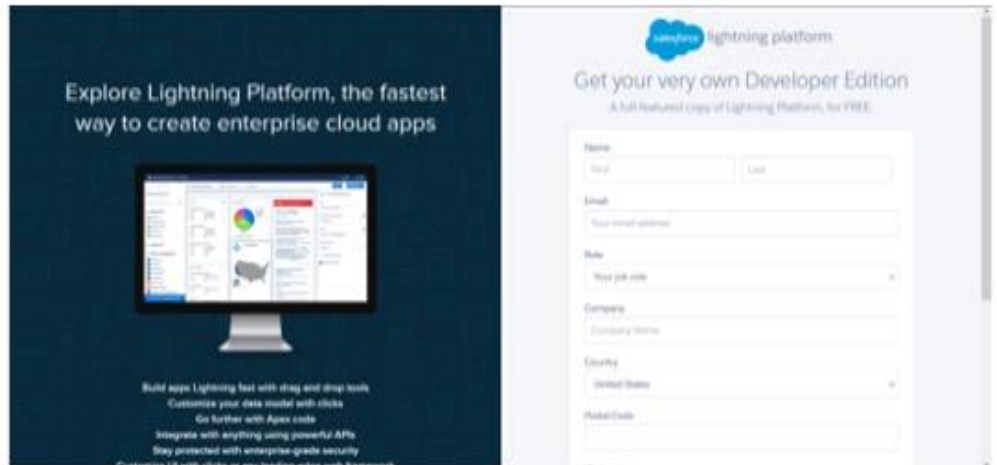
Data Model:

Object name	Fields in the Object	
semester	Field label	Data type
	semester	Text(10)
	Semester name	Text(80)
Candidate	Field label	Data type
	Candidate	Text(12)
	Candidate name	Text(80)
Course details	Field Label	Data Type
	Course details	Text(14)
	Course details name	Text(80)
Lecturer details	Field label	Data type
	Lecturer details	Text(16)
	Lecturer details name	Text(80)
Internal result	Field label	Data type
	Internal result	Text(18)
	Internal result name	Text(80)

## Activity & Screenshot

Milestone 1:Creation Salesforce Org:

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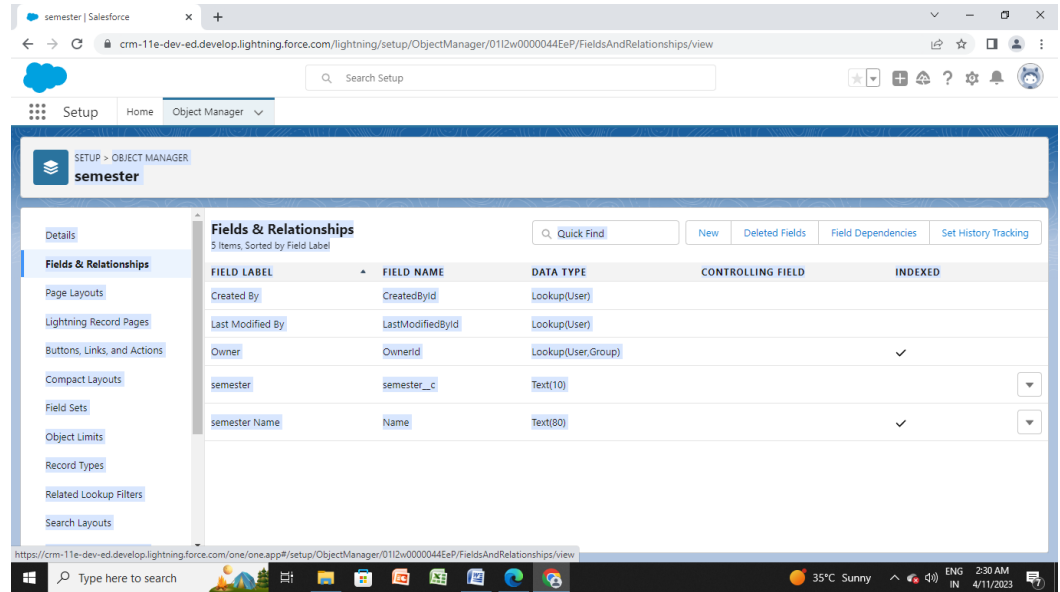


## Activity 1:

1. Go to [developers.salesforce.com/](https://developers.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :
  - a. First name & Last name
  - a. Email
  - b. Role : Developer
  - c. Company : College Name
  - d. County : India
  - e. Postal Code : pin code
  - f. 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](#)

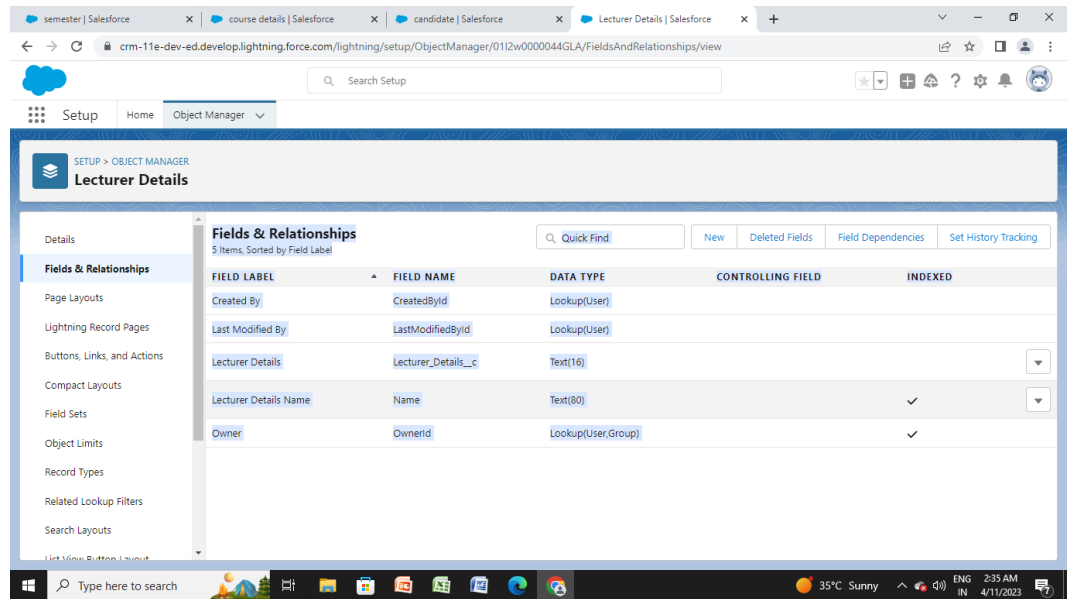
Milestone-2:Object

# Project Report Template



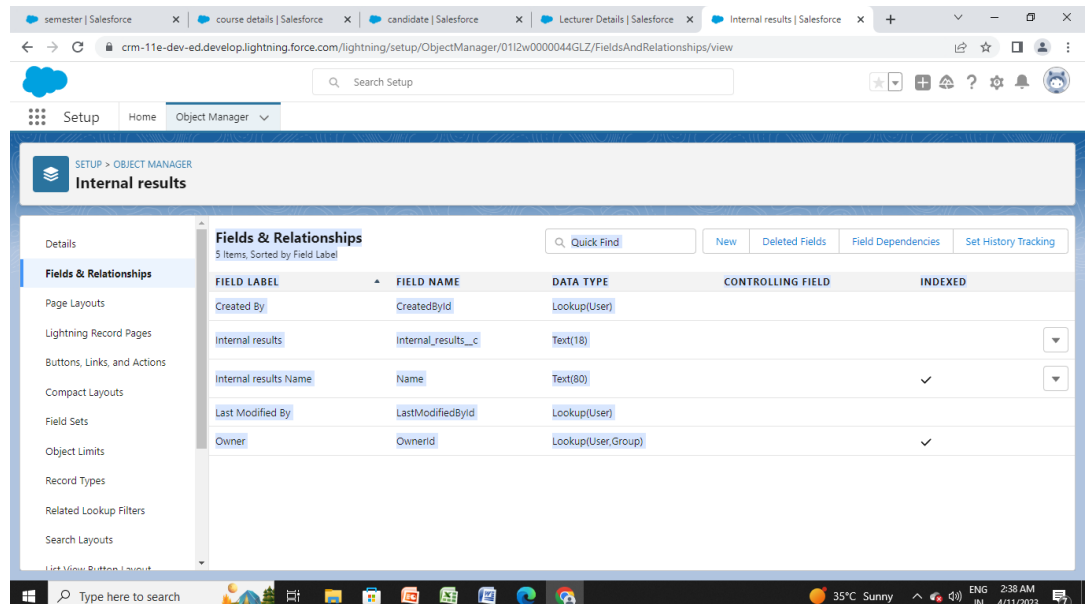
The screenshot shows the Salesforce Object Manager setup for the 'semester' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), semester (semester\_c, Text(10)), and semester Name (Name, Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
semester	semester_c	Text(10)		
semester Name	Name	Text(80)		✓



The screenshot shows the Salesforce Object Manager setup for the 'Lecturer Details' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Last Modified By (LastModifiedBy, Lookup(User)), Lecturer Details (Lecturer\_Details\_c, Text(16)), Lecturer Details Name (Name, Text(80)), and Owner (OwnerId, Lookup(User,Group)).

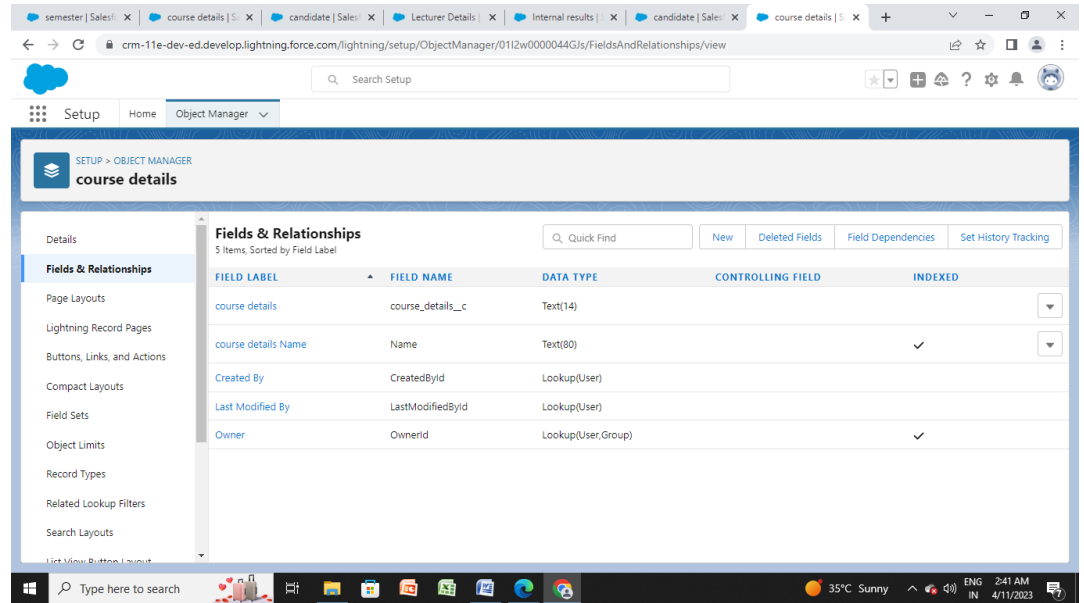
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Lecturer Details	Lecturer_Details_c	Text(16)		
Lecturer Details Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓



The screenshot shows the Salesforce Object Manager setup for the 'Internal results' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Internal results (Internal\_results\_c, Text(18)), Internal results Name (Name, Text(80)), Last Modified By (LastModifiedBy, Lookup(User)), and Owner (OwnerId, Lookup(User,Group)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Internal results	Internal_results_c	Text(18)		
Internal results Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

# Project Report Template



## Activity-1

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 the Text as the Data Type, then click Next.
  - For Field Label, Enter Semester Name.
  - Click Next, Next, then Save

Activity-2: Similarly Create Following Fields according to the objects.

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 Name		Course ID	Marks
	Internal results(lookup)		Course(lookup)	

## Milestone-3:Lightning App

Create the Candidate Internal Result Card app:

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning 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

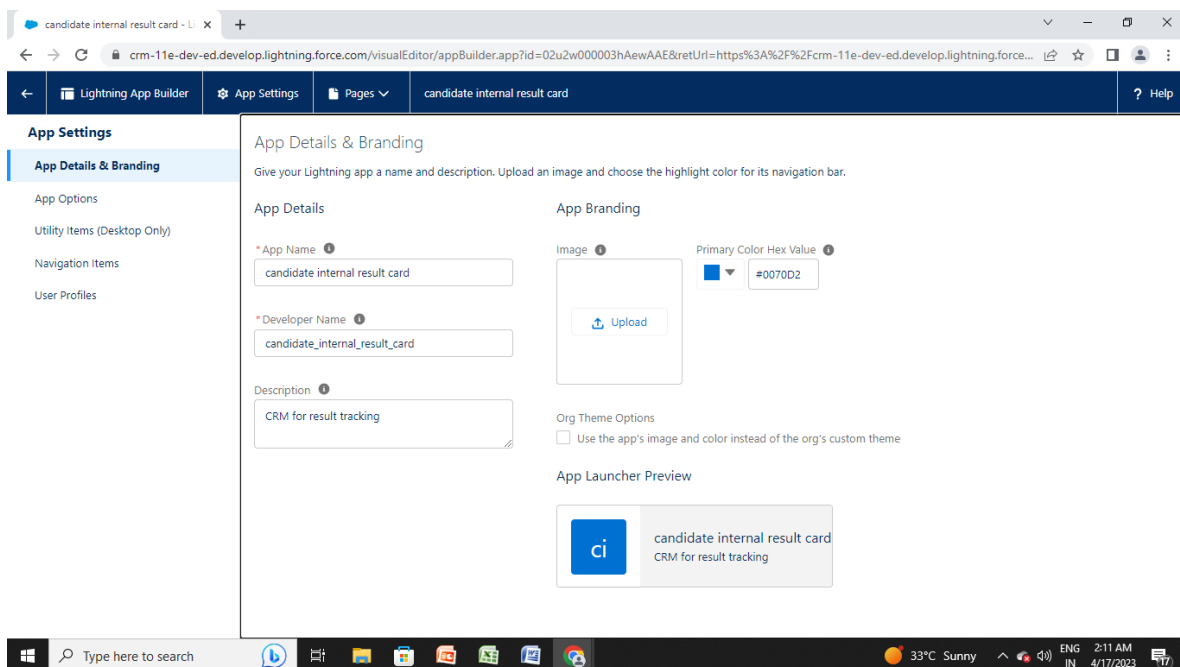
Details,LecturerDetails,InternalResults and move them to Selected Items. Click Next.

- 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. To create a lightning app page: Go to setup page → search “app manager” in quick find → select “app manager” → click on



The screenshot shows the Salesforce Lightning App Builder interface for an app named "candidate internal result card". The interface is divided into a left sidebar with navigation options and a main content area for "App Details & Branding".

**App Settings (Left Sidebar):**

- App Details & Branding (selected)
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

**App Details & Branding (Main Content):**

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details:**

- App Name:** candidate internal result card
- Developer Name:** candidate\_internal\_result\_card
- Description:** CRM for result tracking

**App Branding:**

- Image:** Upload button
- Primary Color Hex Value:** #0070D2
- Org Theme Options:** ☐ Use the app's image and color instead of the org's custom theme

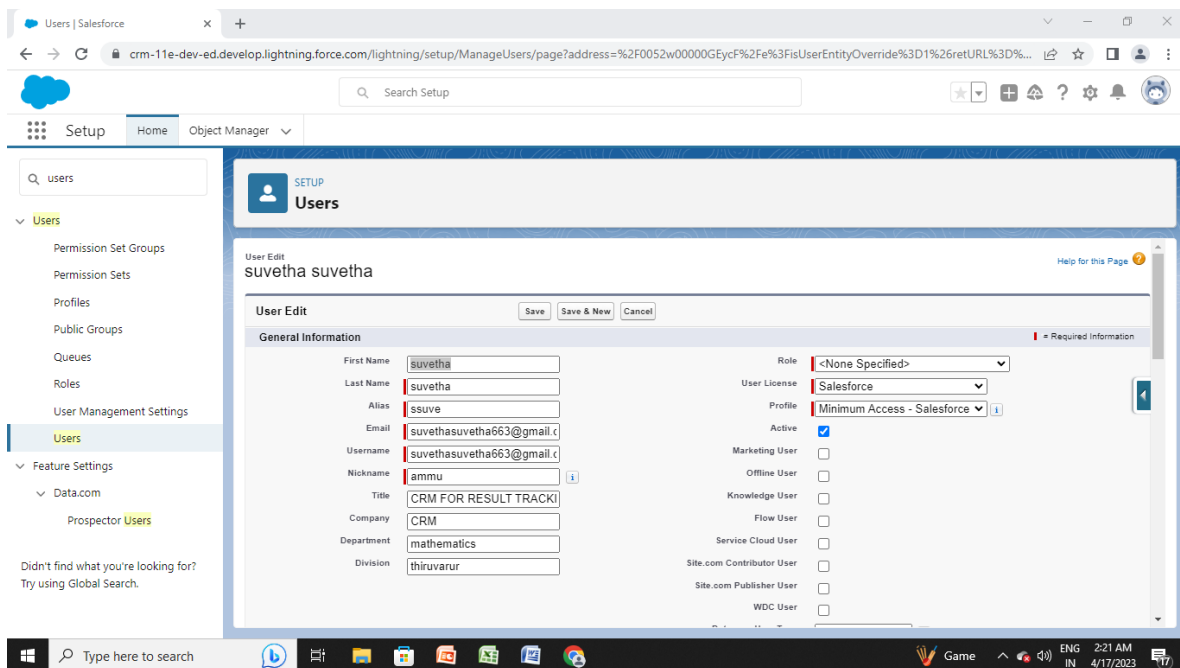
**App Launcher Preview:**

ci candidate internal result card  
CRM for result tracking

## Milestone-4: Users

### Activity 1: Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Martin and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(none)
5. Select a User Licence As salesforce.
6. Select a profile as Salesforce User.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email



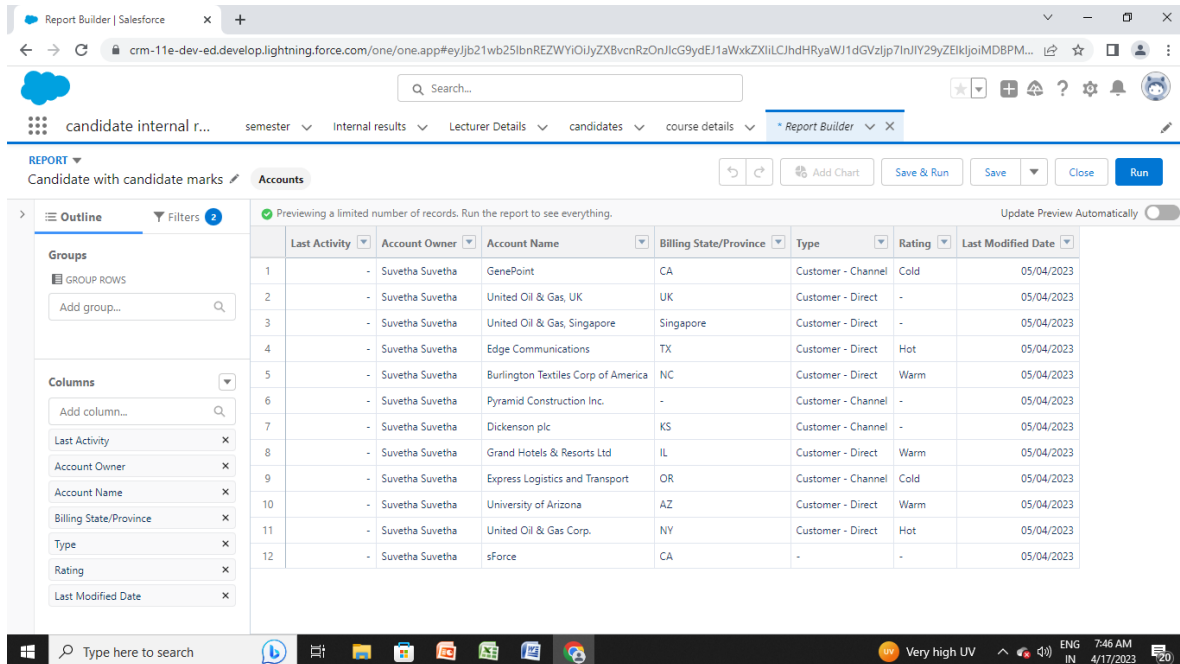
The screenshot shows the Salesforce Setup page for editing a user. The left sidebar contains a search bar and a list of setup items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector. The main content area is titled 'User Edit' and shows the details for a user named 'suvetha suvetha'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section includes fields for Role, User License, Profile, and Active. The 'Marketing User' section includes checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User.

Field	Value
First Name	suvetha
Last Name	suvetha
Alias	ssuve
Email	suvethasuvetha663@gmail.c
Username	suvethasuvetha663@gmail.c
Nickname	ammu
Title	CRM FOR RESULT TRACKI
Company	CRM
Department	mathematics
Division	thiruvannur
Role	<None Specified>
User License	Salesforce
Profile	Minimum Access - Salesforce
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

## Milestone-5: Reports

### Activity 1: Reports and dashboards:

1. From the Reports tab, click New Report.
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.



Report Builder | Salesforce

crm-11e-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWI0YjZkZG9ydEJ1aWxkZXIiOiJhdHRyaWJ1dGVzjp7InIjY29yZElkIjo1MDBPM...

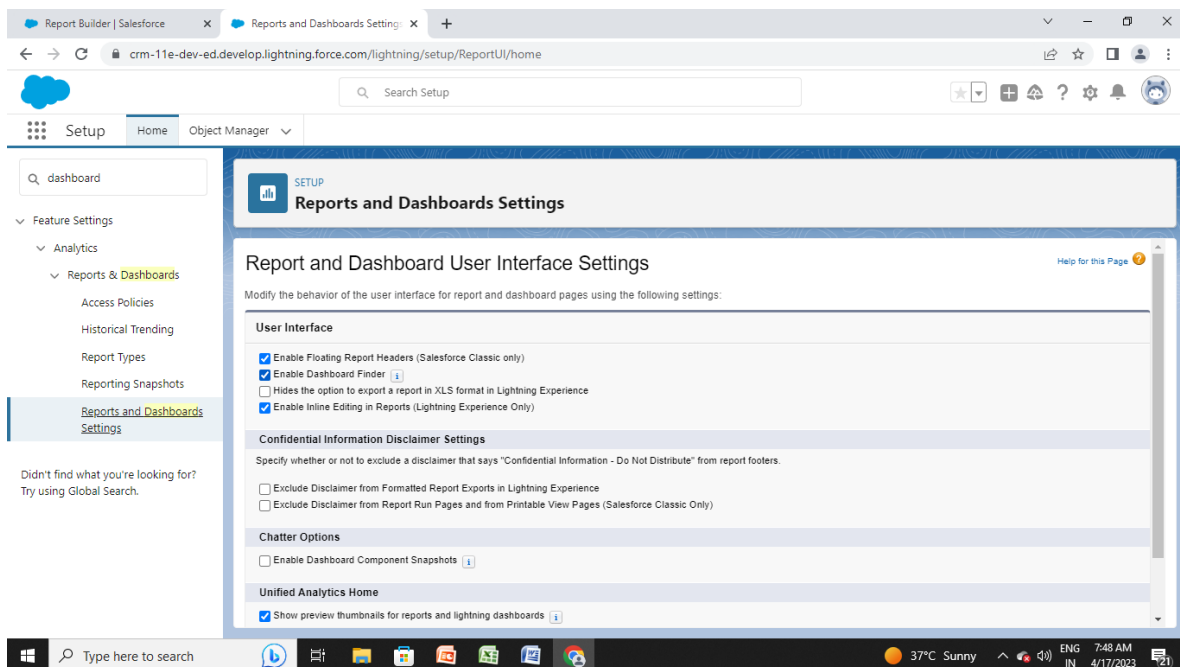
candidate internal r... semester Internal results Lecturer Details candidates course details Report Builder

REPORT Candidate with candidate marks Accounts

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Suvetha Suvetha	GenePoint	CA	Customer - Channel	Cold	05/04/2023
2	-	Suvetha Suvetha	United Oil & Gas, UK	UK	Customer - Direct	-	05/04/2023
3	-	Suvetha Suvetha	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	05/04/2023
4	-	Suvetha Suvetha	Edge Communications	TX	Customer - Direct	Hot	05/04/2023
5	-	Suvetha Suvetha	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	05/04/2023
6	-	Suvetha Suvetha	Pyramid Construction Inc.	-	Customer - Channel	-	05/04/2023
7	-	Suvetha Suvetha	Dickenson plc	KS	Customer - Channel	-	05/04/2023
8	-	Suvetha Suvetha	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	05/04/2023
9	-	Suvetha Suvetha	Express Logistics and Transport	OR	Customer - Channel	Cold	05/04/2023
10	-	Suvetha Suvetha	University of Arizona	AZ	Customer - Direct	Warm	05/04/2023
11	-	Suvetha Suvetha	United Oil & Gas Corp.	NY	Customer - Direct	Hot	05/04/2023
12	-	Suvetha Suvetha	sForce	CA	-	-	05/04/2023

## Milestone-6:Dashboards:



Report Builder | Salesforce

Reports and Dashboards Settings

crm-11e-dev-ed.develop.lightning.force.com/lightning/setup/ReportUI/home

Setup Home Object Manager

dashboard

Feature Settings

- Analytics
  - Reports & Dashboards
    - Access Policies
    - Historical Trending
    - Report Types
    - Reporting Snapshots
    - Reports and Dashboards Settings

Didn't find what you're looking for? Try using Global Search.

SETUP

### Reports and Dashboards Settings

Report and Dashboard User Interface Settings

Modify the behavior of the user interface for report and dashboard pages using the following settings:

**User Interface**

- ☒ Enable Floating Report Headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder
- ☐ Hides the option to export a report in XLS format in Lightning Experience
- ☒ Enable Inline Editing in Reports (Lightning Experience Only)

**Confidential Information Disclaimer Settings**

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

- ☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience
- ☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

**Chatter Options**

- ☐ Enable Dashboard Component Snapshots

**Unified Analytics Home**

- ☒ Show preview thumbnails for reports and lightning dashboards

### Activity 1: Create a Dashboard:

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 Chart and click Add.
7. Click Save.
8. Click Done

### 4 Trailhead Profile Public URL



# Project Report Template

**Team Lead - [trailblazer.me/id/suvetha2003](https://trailblazer.me/id/suvetha2003)**

**Team Member1-[trailblazer.me/id/srinithi2002](https://trailblazer.me/id/srinithi2002)**

**Team Member2-[trailblazer.me/id/rekaa1](https://trailblazer.me/id/rekaa1)**

**Team Member3-[trailblazer.me/id/sindhiya2003](https://trailblazer.me/id/sindhiya2003)**

**Team Member4-[trailblazer.me/id/gokul2002](https://trailblazer.me/id/gokul2002)**

## 5 **ADVANTAGES & DISADVANTAGE**

- Customer experience may worsen due to staff over reliance on the system.
- The excess initial time and productivity cost at the implementation.
- Security and data protection issues with centralised data.

## **APPLICATIONS:**

Sales force unites your marketing sales, commerce, service, and it terms from anywhere with customer 360 one integrated CRM platform that powers our entire suite of connected.

## 6 **CONCLUSION**

In this project we are explained about the topic implementing CRM for result tracking of a candidate with internal marks.

## 7 **FUTURE SCOPE:**

- Customers will become a company's best sales reps through superior products and services as well as customer oriented messaging.
- With over 150,000 organizations utilizing salesforce across the world to fuel their growth, it is the most popular and widely used CRM platform.