

# **Project Report Template**

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

### **1.INTRODUCTION**

Customer Relationship Management (CRM) systems are a powerful tool for tracking and managing interactions with customers and clients. However, they can also be used to manage relationships with other stakeholders, such as job candidates. In this context, a CRM system can be used to track the progress of candidates through the recruitment process, from initial contact to hiring and beyond.

#### **1.1 OVERVIEW**

One specific use case for a CRM system in the recruitment context is tracking the results of a candidate with internal marks. Internal marks are scores or evaluations that are generated by an organization's internal systems or processes, such as exams, assessments, or performance evaluations. By integrating internal marks into a CRM system, recruiters and hiring managers can gain a more holistic view of a candidate's qualifications, skills, and potential fit for a role

#### **1.2 PURPOSE**

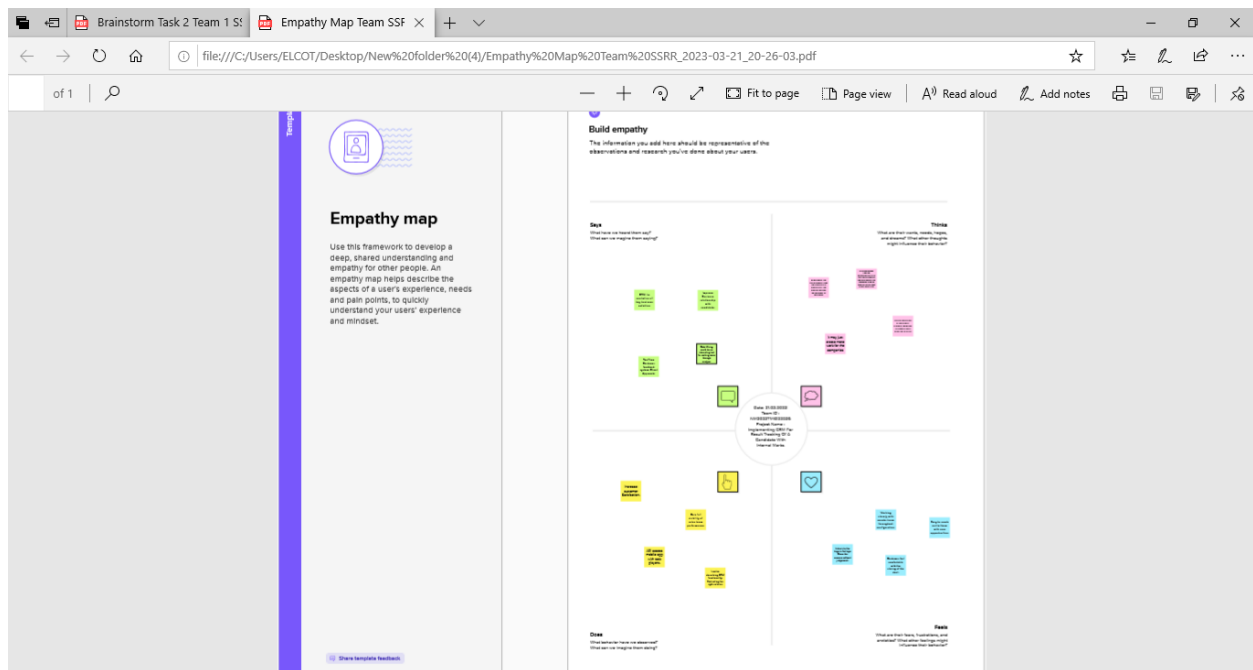
Define your objectives: Before implementing a CRM system, it's important to define your objectives. In this case, the objective is to track the results of a candidate with internal marks.

Choose a CRM software: There are many CRM software options available in the market. Some popular options are Salesforce, HubSpot, Zoho CRM, and Microsoft Dynamics 365. Choose the one that best suits your needs and budget.

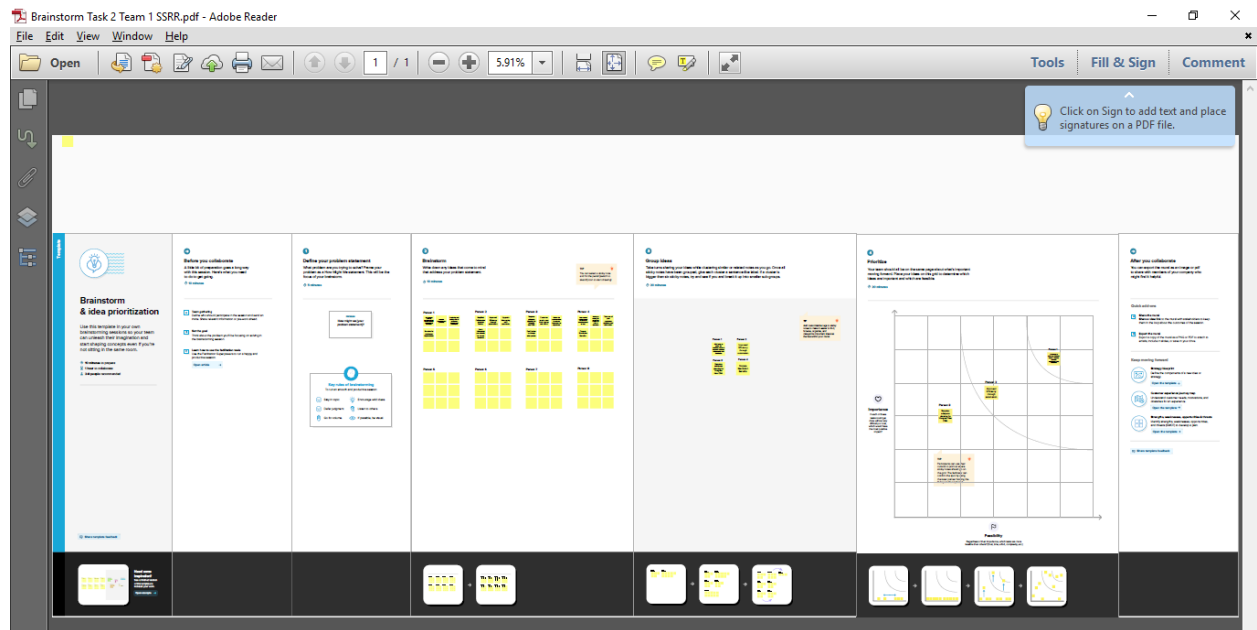
Customize the software: Once you've selected the CRM software, customize it to fit your specific requirements. You may need to add custom fields for internal marks and other relevant data.

## 2.PROBLEM DEFINITION & DESIGN THINKING

### 2.1 EMPATHY MAP



### 2.2 IDEATION & BRAINSTORMING MAP



## 3.RESULT

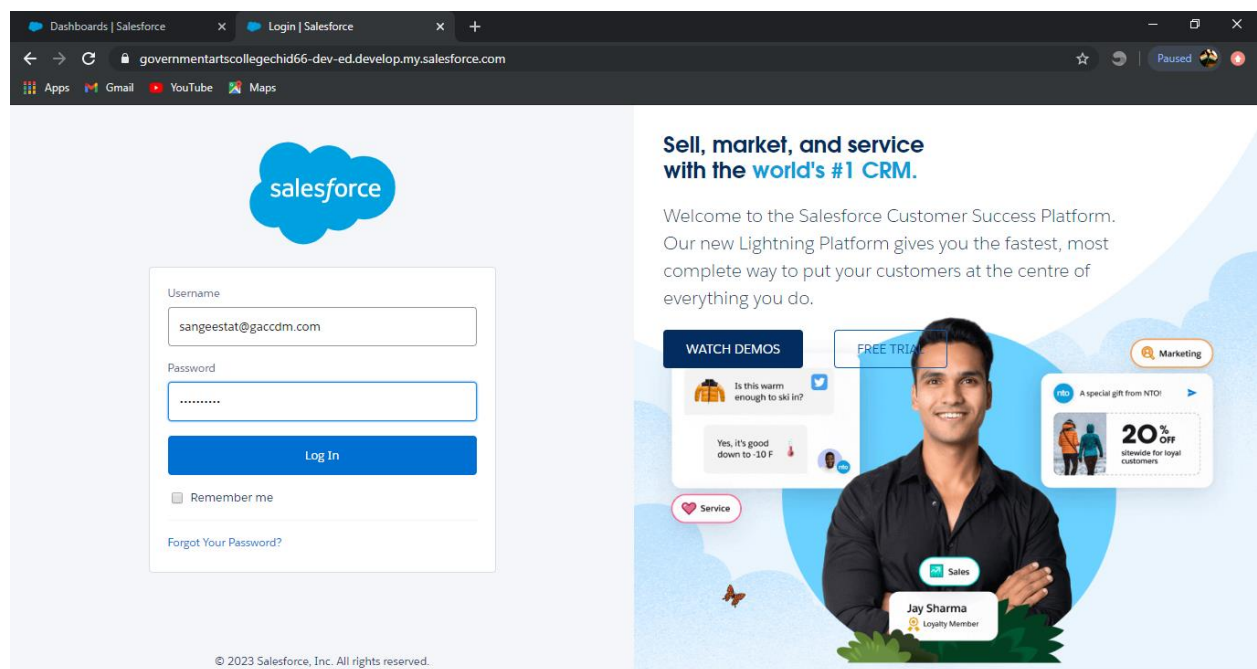
### 3.1 Data Model

Object Name	Fields in the Object	
Semester	Field Label	Date Type
	Semester	Text
Candidate	Field Label	Date Type
	Candidate	Text
Course Details	Field Label	Date Type
	Course Details	Text
Lecturer Details	Field Label	Date Type
	Lecturer Details	Text
Internal Results		

	Field Label	Date Type
	Internal Results	Text

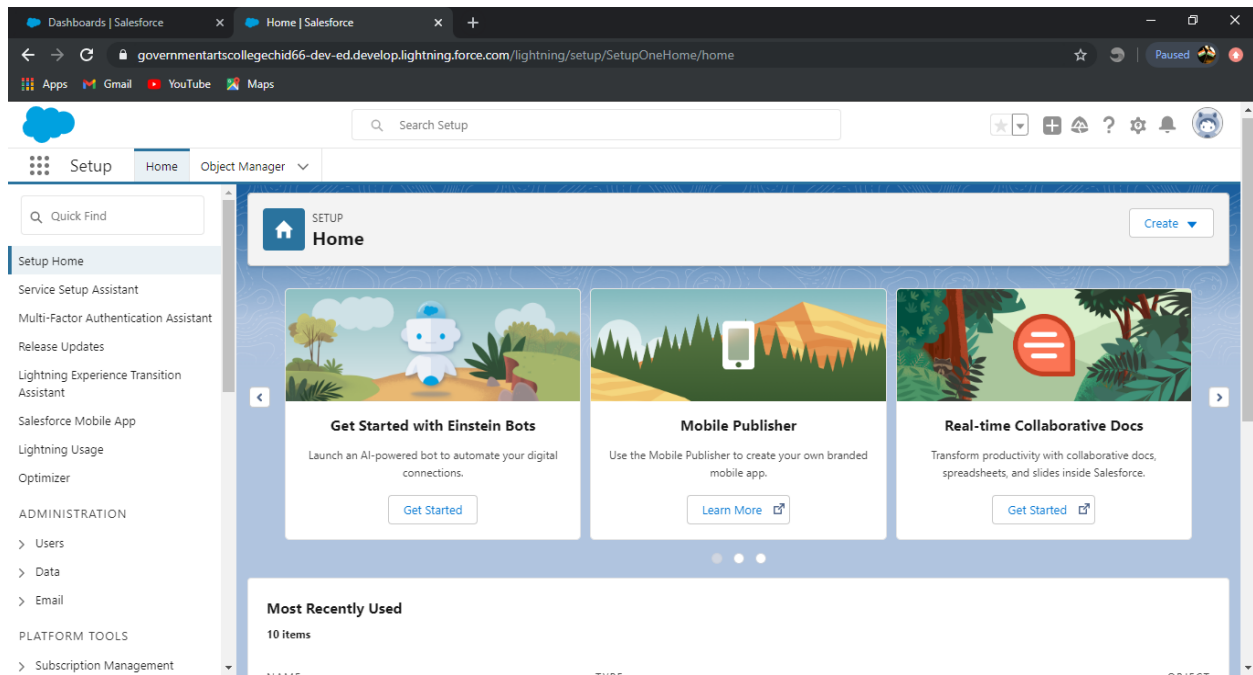
## 3.2.Activity & Screenshot

### Milestone 1 : Creation Salesforce Org



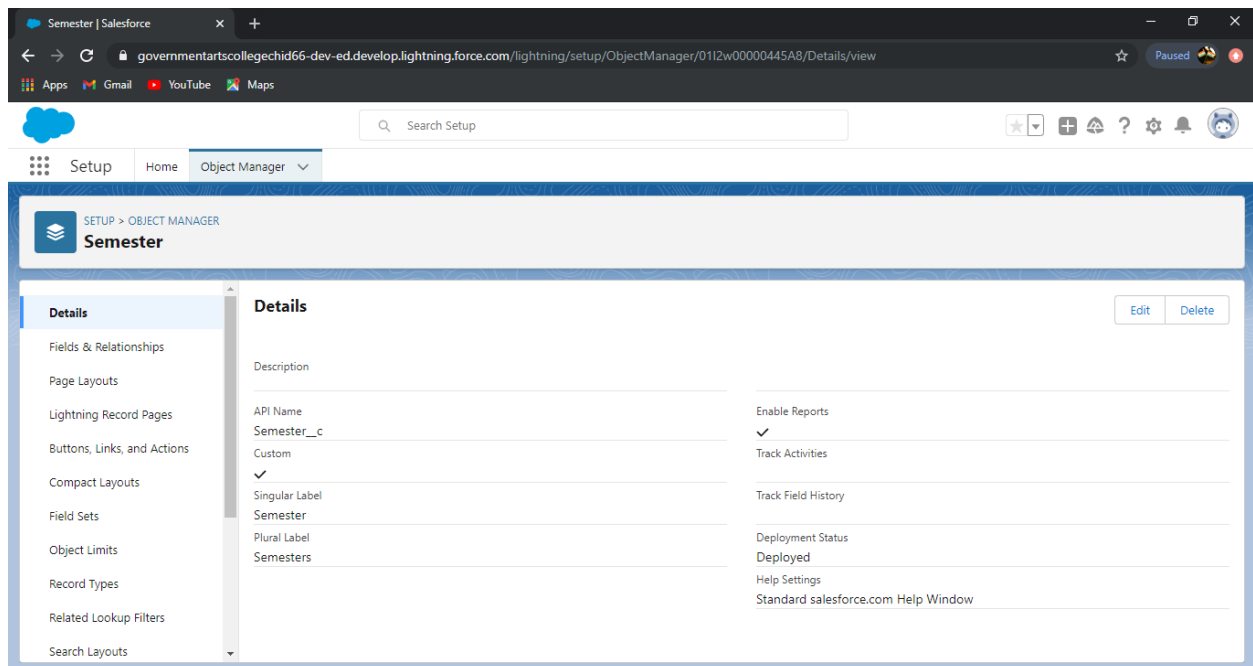
# Activity 1 :

## Salesforce Login



## Milestone 2 :Object

### Activity-1



## Milestone-2: Fields and Relationships

The screenshot shows the Salesforce Setup interface for the 'Semester' object. The left sidebar contains a navigation menu with options like 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, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows a list of 11 fields. The fields are sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate ID	Candidate_ID__c	Date		
Candidate Name	Candidate__c	Date		
Course ID	Course_ID__c	Date		
Course Name	Course_Name__c	Date		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecturer Name	Lecturer_Name__c	Date		
Lecturer Role	Lecturer_Role__c	Date		
Owner	OwnerId	Lookup(User/Group)		✓
Semester	Semester__c	Date		✓
Semester Name	Name	Text(80)		✓

## Milestone 3. Lightning App

The screenshot shows the Salesforce Setup interface for the Lightning Experience App Manager. The left sidebar contains a navigation menu with options like 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, and Lightning Bolt Solutions. The main content area is titled 'Lightning Experience App Manager' and shows a section for 'Clone Apps(Beta)'. Below this, there is a table listing 22 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
4 Bolt Solutions	LightningBolt	Discover and manage busin...	28/03/2023, 12:02 pm	Lightning	✓
5 Candidate Internal Result C...	Candidate_Internal_Result_C...		01/04/2023, 2:41 pm	Lightning	✓
6 Community	Community	Salesforce CRM Community	28/03/2023, 11:58 am	Classic	✓

# Milestone:4.Users

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes a table of user records. The table columns are Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: Chatter Expert, User Integration, User Security, V\_Sangeetha, and V\_Sangeetha. Each user has an 'Edit' link and a checkmark in the 'Active' column. The 'Profile' column lists the roles: Chatter Free User, Analytics Cloud Integration User, Analytics Cloud Security User, System Administrator, and Marketing User. The page also includes a 'New User' button and a 'Reset Password(s)' button.

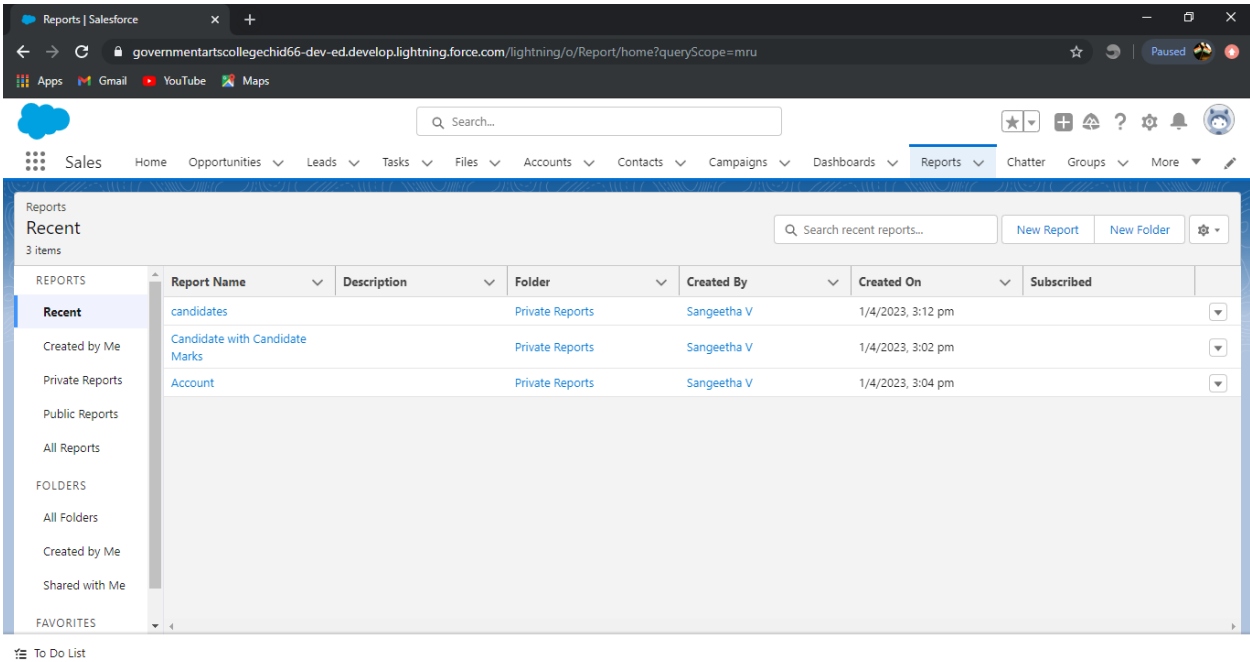
Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000rjoeaz.0j0zmze54pid@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	User Integration	integ	integration@00d2w00000rjoeaz.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rjoeaz.com		✓	Analytics Cloud Security User
<a href="#">Edit</a>	V_Sangeetha	SV	sangeestat@gaccdm.com		✓	System Administrator
<a href="#">Edit</a>	V_Sangeetha	sv	sangeest@gac.com		✓	Marketing User

# Milestone:4.Users

This screenshot is identical to the one above, showing the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes a table of user records. The table columns are Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: Chatter Expert, User Integration, User Security, V\_Sangeetha, and V\_Sangeetha. Each user has an 'Edit' link and a checkmark in the 'Active' column. The 'Profile' column lists the roles: Chatter Free User, Analytics Cloud Integration User, Analytics Cloud Security User, System Administrator, and Marketing User. The page also includes a 'New User' button and a 'Reset Password(s)' button.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000rjoeaz.0j0zmze54pid@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	User Integration	integ	integration@00d2w00000rjoeaz.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rjoeaz.com		✓	Analytics Cloud Security User
<a href="#">Edit</a>	V_Sangeetha	SV	sangeestat@gaccdm.com		✓	System Administrator
<a href="#">Edit</a>	V_Sangeetha	sv	sangeest@gac.com		✓	Marketing User

## Milestone 5. Reports



The screenshot displays the Salesforce Reports page. The browser address bar shows the URL: `governmentartscollegechid66-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr`. The Salesforce navigation bar includes a search bar and a menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The Reports section is active, showing a list of recent reports.

**Reports**  
Recent  
3 items

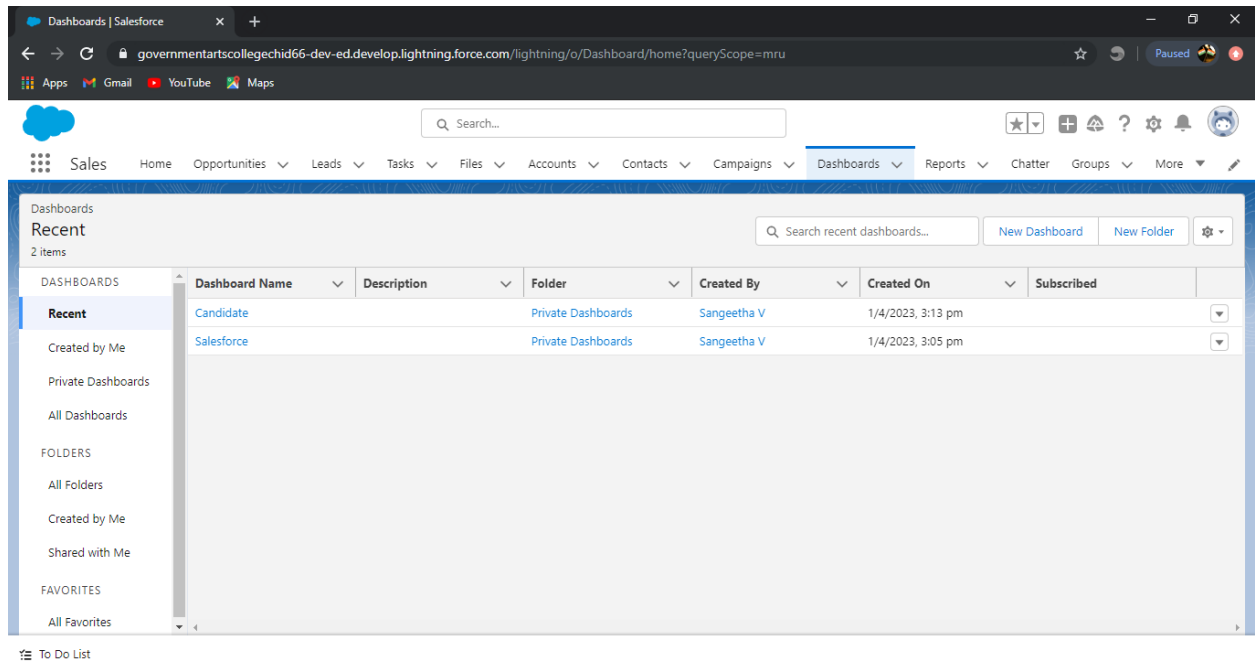
Search recent reports... [New Report](#) [New Folder](#) [Settings](#)

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	candidates		Private Reports	Sangeetha V	1/4/2023, 3:12 pm	<input type="checkbox"/>
Created by Me	Candidate with Candidate Marks		Private Reports	Sangeetha V	1/4/2023, 3:02 pm	<input type="checkbox"/>
Private Reports	Account		Private Reports	Sangeetha V	1/4/2023, 3:04 pm	<input type="checkbox"/>
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						

[To Do List](#)

## Milestone:6.Dashboards





#### 4.Trailhead Profile Public URL

**Team Lead** – <https://trailblazer.me/id/sangv12>

**Team Member 1** - <https://trailblazer.me/id/smazhavai>

**Team Member 2** - <https://trailblazer.me/id/rragulraj2003>

**Team Member 3** - <https://trailblazer.me/id/rgopal100>

#### 5.ADVANTAGES & DISADVANTAGES

Centralized tracking: A CRM system allows for centralized tracking of a candidate's results, making it easy for multiple stakeholders such as teachers, administrators, and parents to access the same information.

Real-time updates: With a CRM system, results can be updated in real-time as soon as they are available, providing timely information for decision-making and evaluation.

Customization: A CRM system can be customized to meet the specific needs of a school or educational institution, with features such as data analytics and reporting that can provide valuable insights into a candidate's performance.

Collaboration: A CRM system can facilitate collaboration between teachers and administrators, allowing for a more coordinated approach to student assessment and tracking.

## **DISADVANTAGES**

Cost: Implementing a CRM system can be expensive, especially for smaller educational institutions with limited budgets.

Complexity: A CRM system can be complex to set up and maintain, requiring technical expertise and ongoing support.

Resistance to change: Some stakeholders may resist the implementation of a new system, particularly if it requires changes to established practices and processes.

Data security: A CRM system requires careful management of data security and privacy, particularly if it includes sensitive information such as student performance data.

## **6.APPLICATION**

Identify the requirements: The first step is to identify the requirements of the CRM system. In this case, the system should be able to track the internal marks of a candidate and provide updates on their results.

Select a CRM platform: There are many CRM platforms available, such as Salesforce, HubSpot, Zoho, etc. Select a platform that suits your requirements and budget.

Customize the CRM platform: Once you have selected a CRM platform, customize it to suit your needs. Create fields to capture the candidate's information such as name, roll number, course, semester, etc. Create fields to capture the internal marks of the candidate.

Integrate with the internal marks application system: Integrate the CRM platform with the internal marks application system. This can be done through APIs or other integration methods. The integration should allow the CRM system to receive updates on the internal marks of the candidate.

## **7.CONCLUSION**

Choose a CRM system: There are many CRM systems available, so it's important to choose one that fits your needs. Look for a system that can handle the volume of data you expect to generate, and that has the features you need to track the candidate's results effectively. Consider factors such as cost, ease of use, and support options when making your selection.

Set up your system: Once you have chosen a CRM system, you will need to set it up to track the candidate's internal marks. This may involve creating custom fields to capture the data you need, setting up automated workflows to ensure that data is entered correctly and consistently, and configuring reports or dashboards to visualize the data in a way that is meaningful to you.

Train your staff: A CRM system is only as effective as the people using it, so it's important to train your staff on how to use the system to track the candidate's results. Make sure everyone knows how to enter

data accurately, how to access the information they need, and how to interpret the data.

In conclusion, implementing a CRM system to track a candidate's internal marks can be a valuable tool for identifying areas where they may need additional support, and for making decisions about promotions or other opportunities. By following these steps, you can set up a system that meets your needs and helps you achieve your goals

## **8.FUTURE SCOPE**

**Determine the requirements:** Identify the data points that need to be tracked for each candidate, including their personal details, academic history, and internal assessment marks.

**Select a CRM tool:** Choose a CRM tool that can handle the requirements and has the features you need. Salesforce, HubSpot, Zoho CRM are some popular options.

**Set up the system:** Set up the CRM system to capture the data points you need. Create custom fields for candidate details and academic history. Configure automation to import data from other sources such as spreadsheets or databases.

**Integrate with other systems:** Integrate the CRM system with other systems such as learning management systems, student information systems, and assessment systems to automatically capture data and keep it up-to-date.