

# **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**

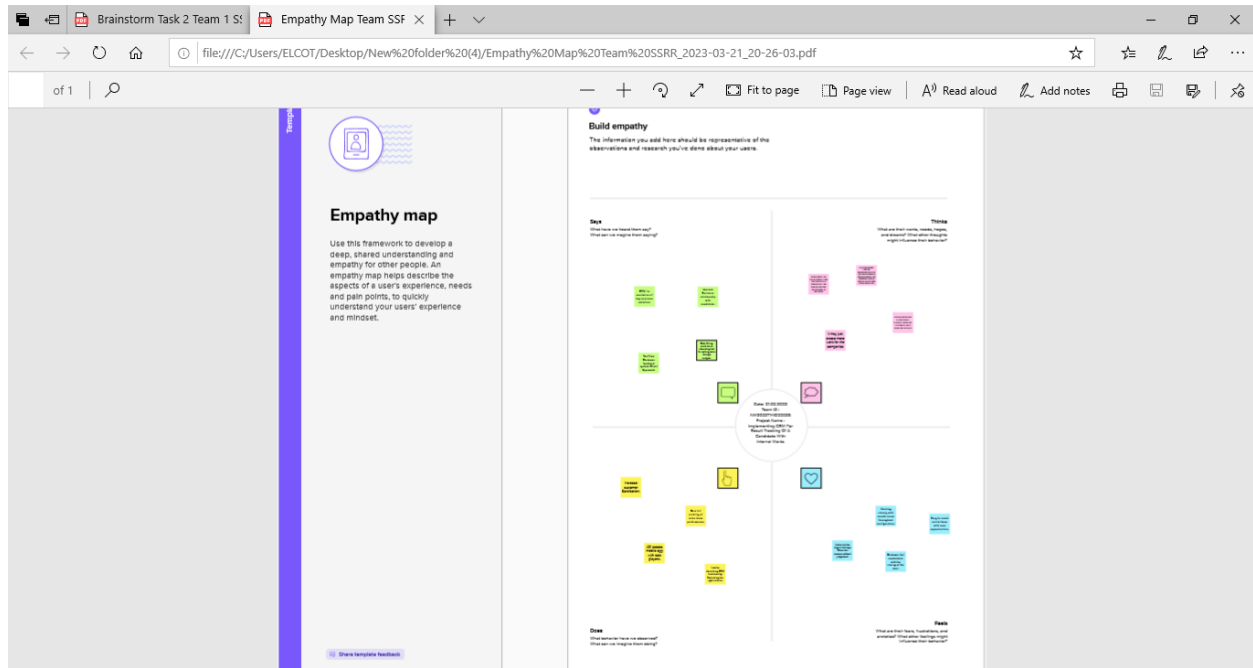
Define your objectives: Before implementing a CRM system, it's important to define your objectives. In this case, the objective is to track the results of a candidate with internal marks.

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.

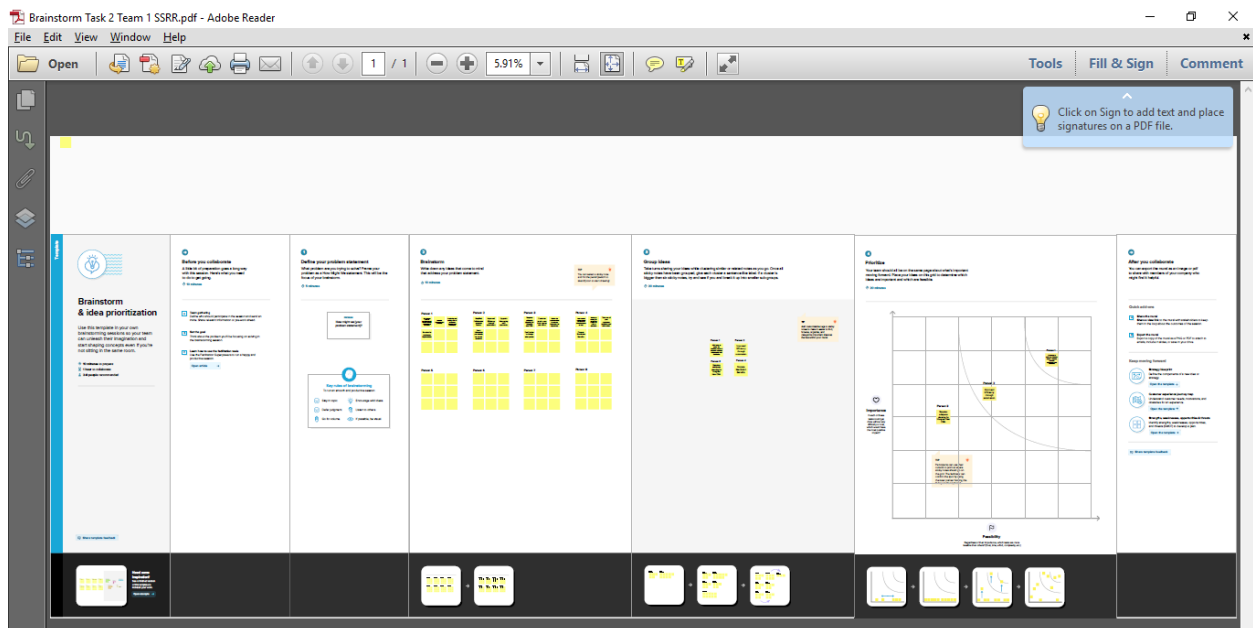
Customize the software: Once you've selected the CRM software, customize it to fit your specific requirements. You may need to add custom fields for internal marks and other relevant data.

## 2.PROBLEM DEFINITION & DESIGN THINKING

### 2.1 EMPATHY MAP



### 2.2 IDEATION & BRAINSTORMING MAP



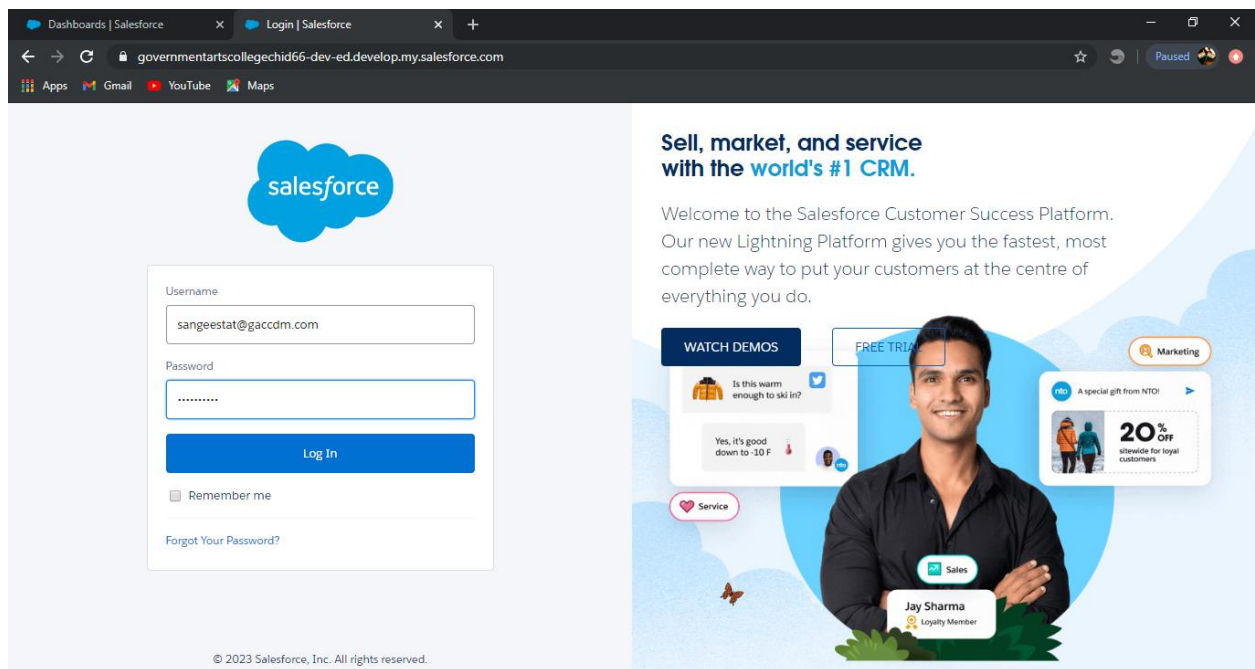
### 3.RESULT

#### 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

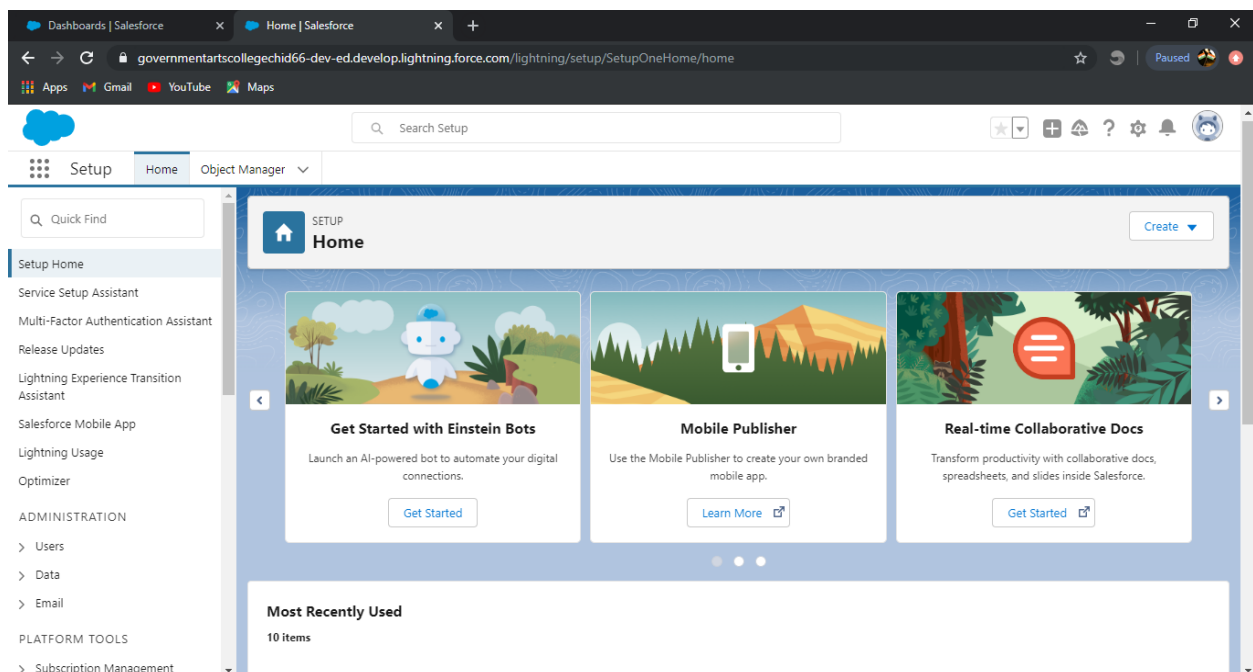
## 3.2.Activity & Screenshot

### Milestone 1 : Creation Salesforce Org



### Activity 1 :

### Salesforce Login



# Milestone 2 :Object Activity-1

The screenshot shows the Salesforce Object Manager interface for the 'Semester' 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, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes a description, API Name (Semester\_\_c), Custom status, Singular Label (Semester), Plural Label (Semesters), and various settings like Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Buttons for 'Edit' and 'Delete' are visible in the top right corner.

Setup > OBJECT MANAGER  
**Semester**

**Details**

Description

API Name  
Semester\_\_c

Custom

Singular Label  
Semester

Plural Label  
Semesters

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Milestone-2: Fields and Relationships

The screenshot shows the Salesforce Object Manager interface for the 'Semester' object, specifically the 'Fields & Relationships' section. 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, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists 11 items, including Candidate ID, Candidate Name, Course ID, Course Name, Created By, Last Modified By, Lecturer Name, Lecturer Role, Owner, Semester, and Semester Name. Buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are visible in the top right corner.

Setup > OBJECT MANAGER  
**Semester**

**Fields & Relationships**  
11 items. Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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 Lightning Experience App Manager setup page. The browser address bar displays the URL: `governmentartscollegechid66-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The page title is "Lightning Experience App Manager". On the left, a navigation menu lists various setup options, with "App Manager" selected. The main content area features a "Clone Apps(Beta)" section with a toggle for "Enable App Cloning" (currently disabled). Below this, a table lists 22 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, and a checkbox for "A...".

App Name	Developer Name	Description	Last Modified	A...
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 Lightning Experience Users management page. The browser address bar displays the URL: `governmentartscollegechid66-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home`. The page title is "Users". On the left, a navigation menu lists various setup options, with "Users" selected. The main content area features an "All Users" section with a table listing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists 5 users, including Chatter Expert, User Integration, User Security, V\_Sangeetha, and V\_Sangeetha.

Action	Full Name	Alias	Username	Role	Active	Profile
[Edit]	Chatter Expert	Chatter	chatter.00d2v00000r0r0eaz,0j0zmze54oid@chatter.salesforce.com		✓	Chatter Free User
[Edit]	User Integration	integ	integration@00d2v00000r0r0eaz.com		✓	Analytics Cloud Integration User
[Edit]	User Security	sec	insightsecurity@00d2v00000r0r0eaz.com		✓	Analytics Cloud Security User
[Edit]	V_Sangeetha	SV	sangeestai@gaccdm.com		✓	System Administrator
[Edit]	V_Sangeetha	sv	sangeest@gac.com		✓	Marketing User

## Milestone:4.Users

The screenshot shows the Salesforce 'Users' management page. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, User Integration, User Security, V\_Sangeetha, and V\_Sangeetha. The page also includes a 'New User' button and a 'Reset Password(s)' button.

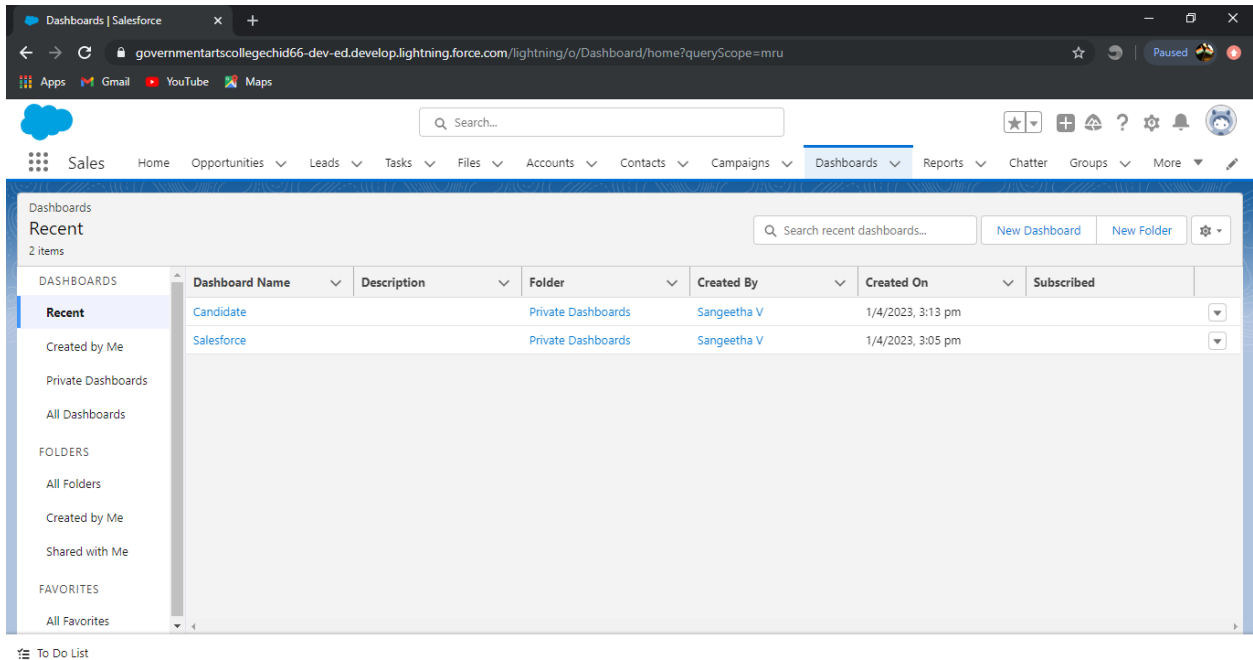
Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000grjoeaz.00zmze549jd@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	User Integration	integ	integration@00d2w00000grjoeaz.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000grjoeaz.com		✓	Analytics Cloud Security User
<a href="#">Edit</a>	V_Sangeetha	SV	sangeestai@qacdm.com		✓	System Administrator
<a href="#">Edit</a>	V_Sangeetha	sv	sangeet@qac.com		✓	Marketing User

## Milestone 5. Reports

The screenshot shows the Salesforce 'Reports' page. The left sidebar contains navigation links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The main content area is titled 'Recent' and includes a table of reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are candidates, Candidate with Candidate Marks, and Account. The page also includes a 'New Report' button and a 'New Folder' button.

Report Name	Description	Folder	Created By	Created On	Subscribed
candidates		Private Reports	Sangeetha V	1/4/2023, 3:12 pm	
Candidate with Candidate Marks		Private Reports	Sangeetha V	1/4/2023, 3:02 pm	
Account		Private Reports	Sangeetha V	1/4/2023, 3:04 pm	

## Milestone:6.Dashboards



The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes the Salesforce logo, a search bar, and various app icons. The main content area displays a list of recent dashboards under the 'Recent' tab. The list contains two items: 'Candidate' and 'Salesforce', both created by 'Sangeetha V' on 1/4/2023. The interface also shows a sidebar with navigation options like 'Dashboards', 'Reports', 'Chatter', and 'Groups'.

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Candidate		Private Dashboards	Sangeetha V	1/4/2023, 3:13 pm	
Salesforce		Private Dashboards	Sangeetha V	1/4/2023, 3:05 pm	

## 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.