

Project Report

IMPLMENTING CRM FOR RESULT TRACKING OF A CANDITATE WITH INTERNAL MARKS

1. Introduction :

1.1. Overview

A CRM system helps you keep your customer's contact details up to date, track every interaction they have with your business, and manage their accounts. It's designed to help you, improve your customer relationships, and in turn, customer lifetime value.

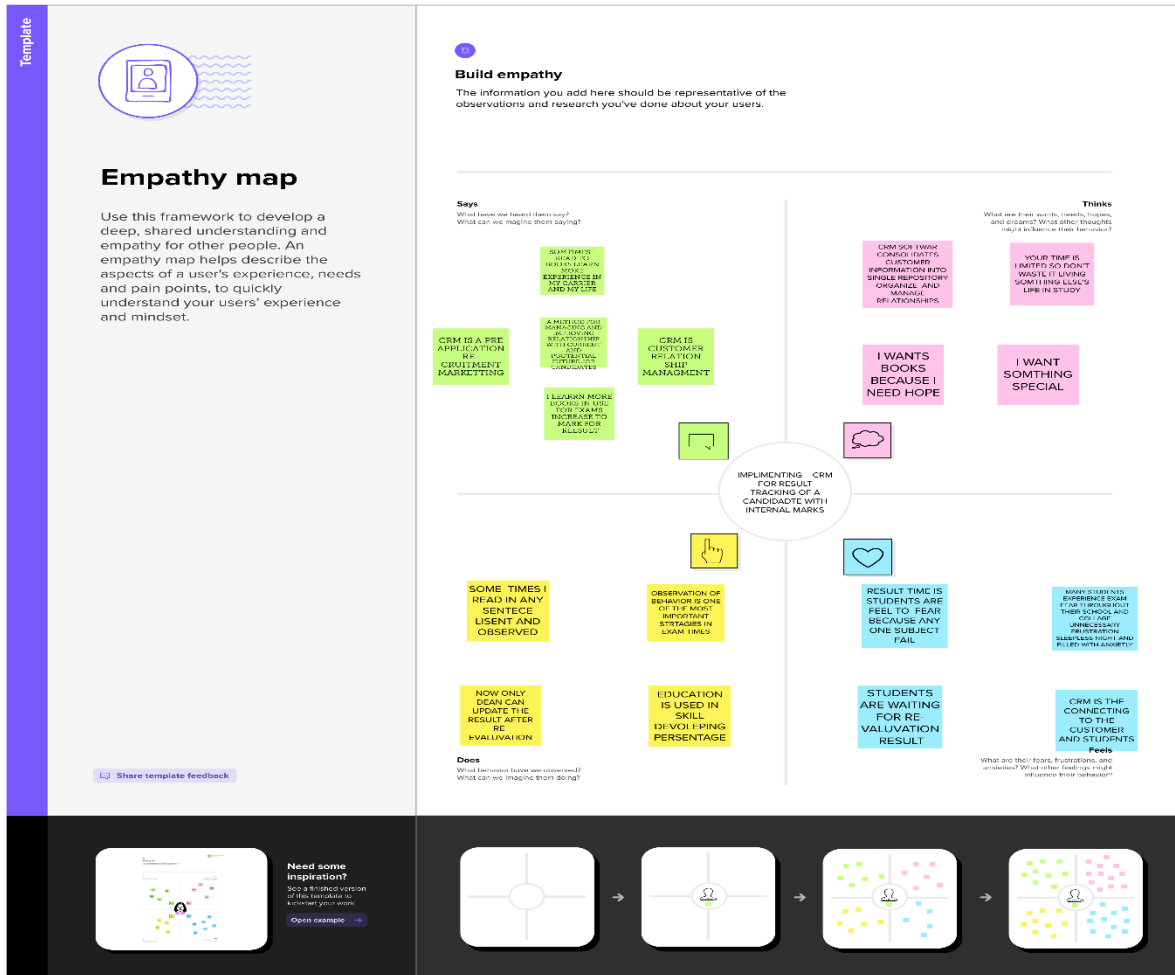
1.2. Purpose

The purpose of our project is to provide customers with a clear vision of

- ❖ *Implementing a CRM system is a value-adding process that can bring great benefits to any business.*
- ❖ *The ultimate goal is to improve communication and interaction with real customers and leads, and to maximise their impact on the production process and business figures.*

2. Problem Definition & Design Thinking :

2.1. Empathy Map For Build an Event Management Using Salesforce



2.2. Ideation & Brainstorming Map



3. RESULT :

3.1. Data Model :

Objects	Fields in the Object										
Semester	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Semester Name</td><td>Text</td></tr><tr><td>Course</td><td>Look-up Relationship</td></tr></table>	Field Label	Data Type	Semester Name	Text	Course	Look-up Relationship				
Field Label	Data Type										
Semester Name	Text										
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Canditate	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Canditate Name</td><td>Text</td></tr><tr><td>Canditatee ID</td><td>E-mail</td></tr><tr><td>Semester Name</td><td>Text</td></tr><tr><td>Internal Results</td><td>Look-up Relationship</td></tr></table>	Field Label	Data Type	Canditate Name	Text	Canditatee ID	E-mail	Semester Name	Text	Internal Results	Look-up Relationship
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Course Name	Text										
Course ID	E-mail										
Lecturer Details	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Lecturer Role</td><td>Text</td></tr><tr><td>Lecturer Name</td><td>E-mail</td></tr><tr><td>Course ID</td><td>E-mail</td></tr><tr><td>Course</td><td>Look-up Relationship</td></tr></table>	Field Label	Data Type	Lecturer Role	Text	Lecturer Name	E-mail	Course ID	E-mail	Course	Look-up Relationship
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Canditate ID	E-mail										
Course ID	E-mail										
Marks	Auto Number										

3.2. Activity & Screenshot

3.2.1. Objects :

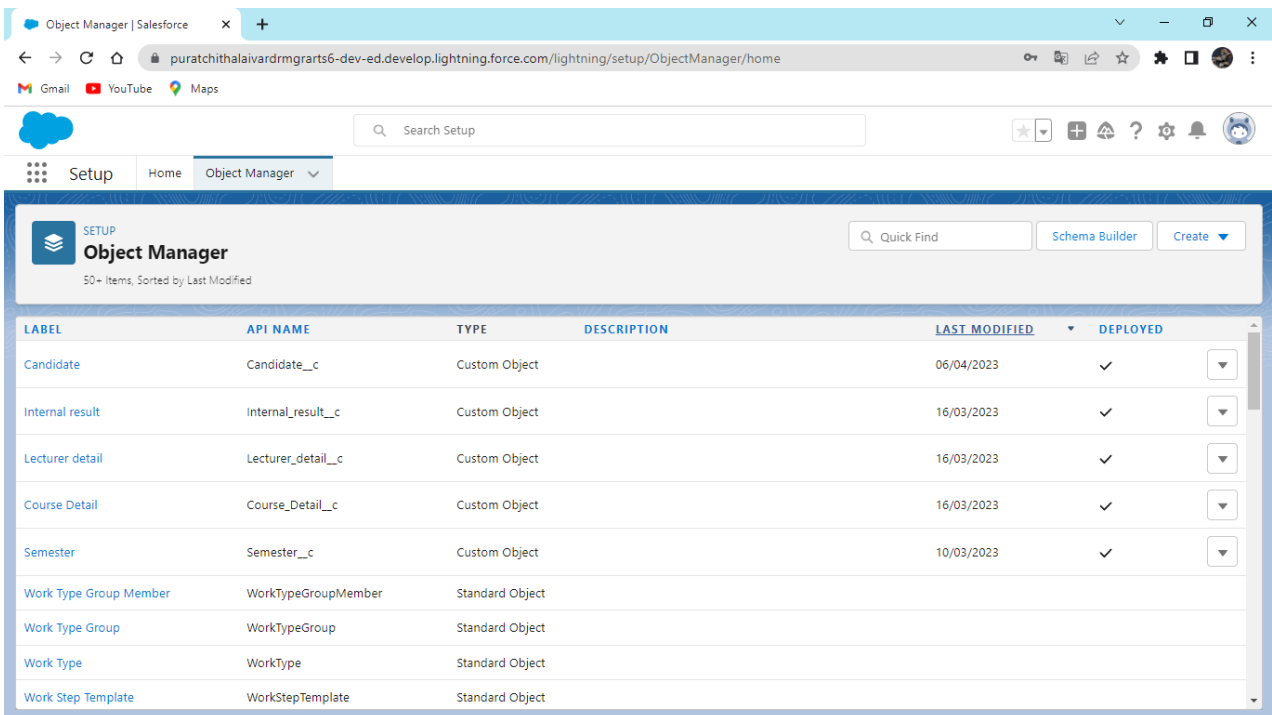
Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types :

- **Standard Objects** : Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects** : Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Creation of Custom Objects :

- **Semester**
- **Candidate**
- **Course details**
- **Lecturer Details**
- **Internal Results**



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Object Manager' section is active, displaying a list of objects. The list includes custom objects like 'Candidate', 'Internal result', 'Lecturer detail', 'Course Detail', and 'Semester', as well as standard objects like 'Work Type Group Member', 'Work Type Group', 'Work Type', and 'Work Step Template'. Each row shows the object's label, API name, type, description, last modified date, and deployment status.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Candidate	Candidate__c	Custom Object		06/04/2023	✓
Internal result	Internal_result__c	Custom Object		16/03/2023	✓
Lecturer detail	Lecturer_detail__c	Custom Object		16/03/2023	✓
Course Detail	Course_Detail__c	Custom Object		16/03/2023	✓
Semester	Semester__c	Custom Object		10/03/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			

3.2.2. Fields and Relationship :

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

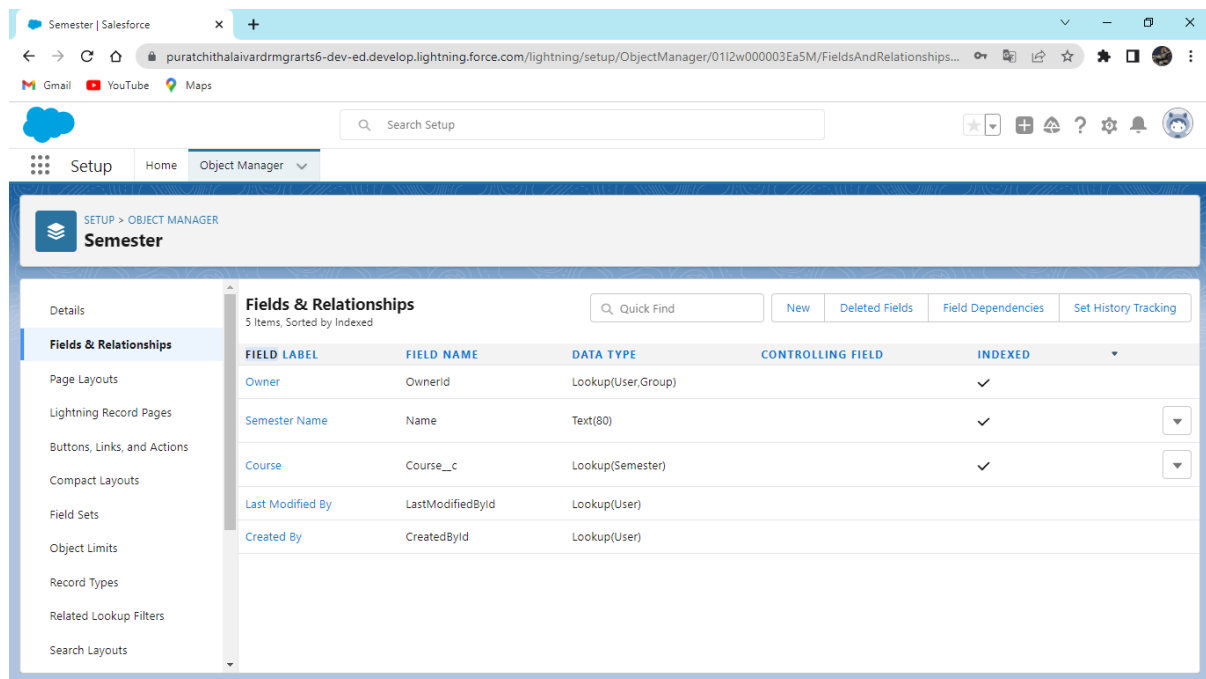
There are 2 types of fields in salesforce:

- **Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- **Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

Creation of Fields

- **Semester**
- **Candidate**
- **Course details**
- **Lecturer Details**
- **Internal Results**

Creation Of Fields Semester



The screenshot shows the Salesforce Setup interface for the 'Semester' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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 'Fields & Relationships' and shows a table of 5 items, sorted by Indexed. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Owner (Ownerid, Lookup(User,Group), Indexed), Semester Name (Name, Text(80), Indexed), Course (Course__c, Lookup(Semester), Indexed), Last Modified By (LastModifiedById, Lookup(User), Indexed), and Created By (CreatedById, Lookup(User), Indexed).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Owner	Ownerid	Lookup(User,Group)		✓
Semester Name	Name	Text(80)		✓
Course	Course__c	Lookup(Semester)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		✓

Creation Of Fields Candidate

Candidate | Salesforce

puratchithalaivardmrgarts6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003EwdK/FieldsAndRelationships/...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Candidate

Details

Fields & Relationships

9 Items, Sorted by Indexed

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Owner	OwnerId	Lookup(User,Group)		✓
Candidate Name	Name	Text(80)		✓
Internal result	Internal_result__c	Lookup(Internal result)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Created By	CreatedById	Lookup(User)		
Candidate	Candidate__c	Text(18)		
Semester Name	Semester_Name__c	Text(18)		
Candidate Id	Candidate_Id__c	Email		

Creation Of Fields Course Details

Course Detail | Salesforce

puratchithalaivardmrgarts6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003F0qk/FieldsAndRelationships/...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Course Detail

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Detail Name	Name	Text(80)		✓
Course Id	Course_Id__c	Email		
Course Name	Course_Name__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Creation Of Fields Lecturer Details

Lecturer detail | Salesforce

puratchithalaivardmgrarts6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003F0r4/FieldsAndRelationships/...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lecturer detail

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Lecturer_detail__c	Lookup(Course Detail)		✓
Course Id	Course_Id__c	Email		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lecturer detail Name	Name	Text(80)		✓
Lecturer Name	Lecturer_Name__c	Email		
Lecturer Role	Lecturer_Role__c	Text(18)		
Owner	OwnerId	Lookup(User Group)		✓

Creation Of Fields Internal Results

Internal result | Salesforce

puratchithalaivardmgrarts6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003F0sR/FieldsAndRelationships/...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Internal result

Details

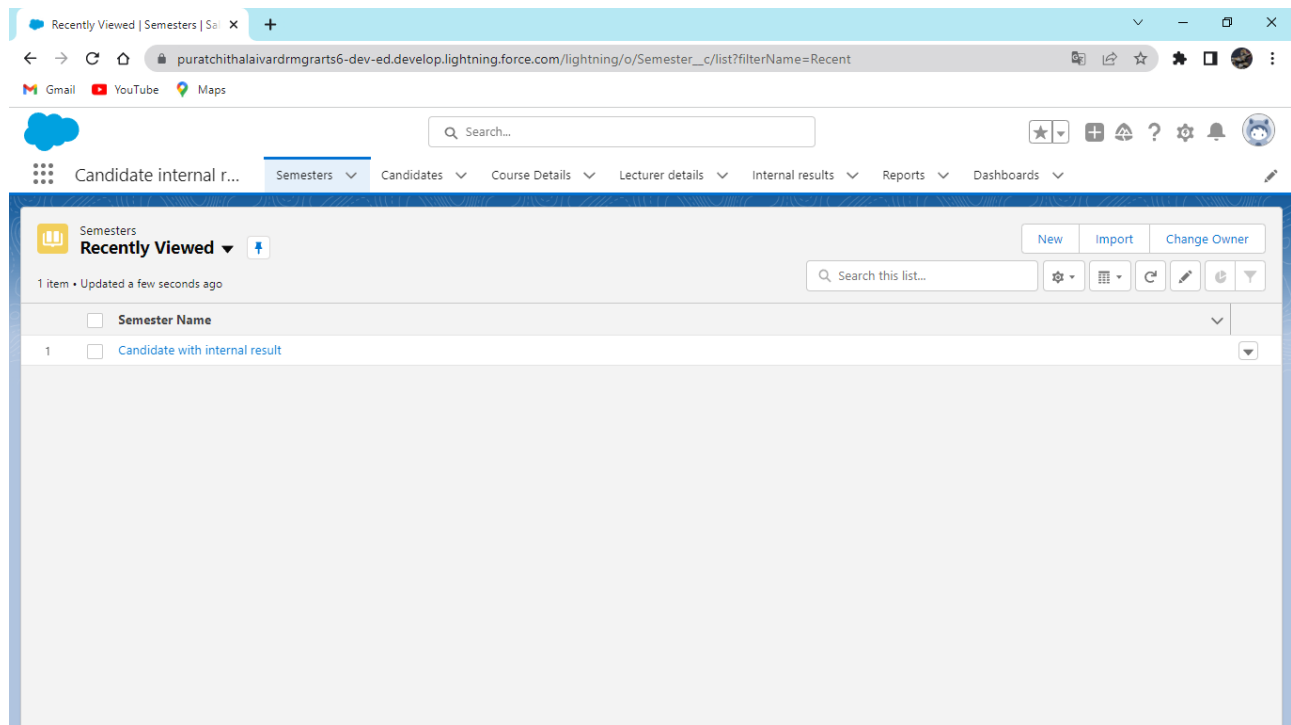
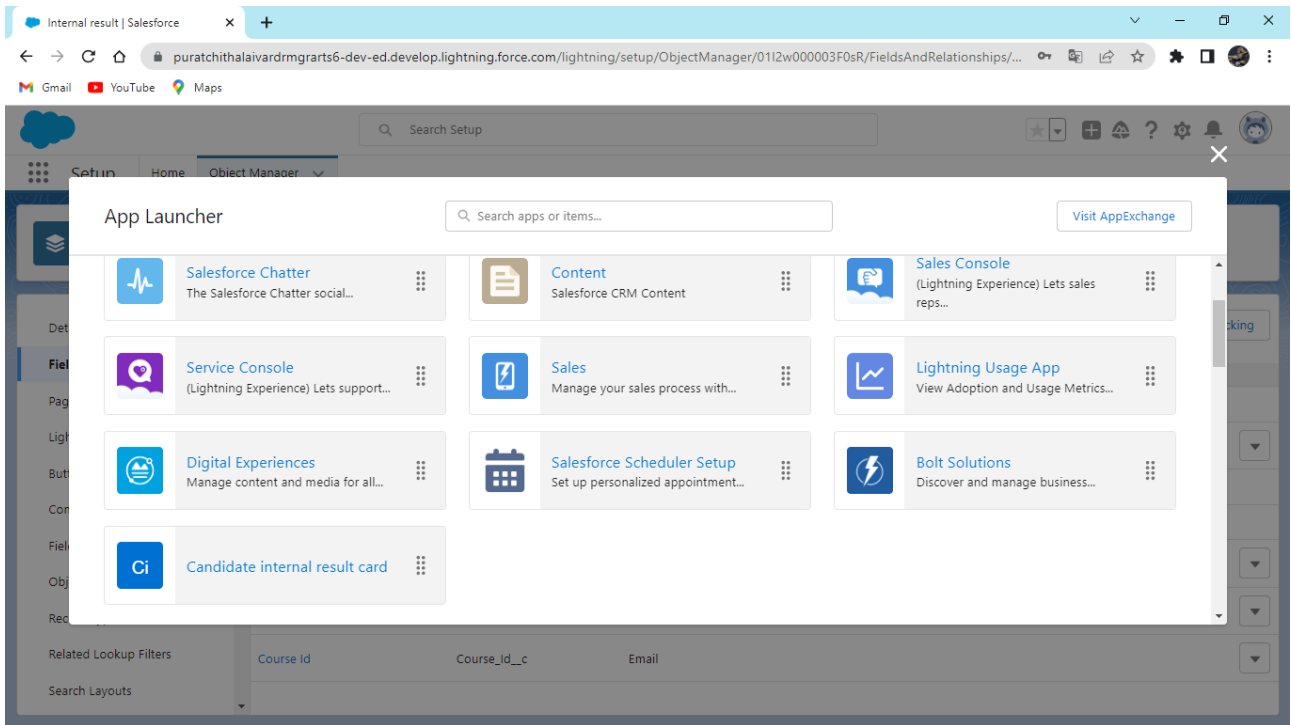
Fields & Relationships
7 Items, Sorted by Indexed

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Owner	OwnerId	Lookup(User,Group)		✓
Internal result Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Created By	CreatedById	Lookup(User)		
Marks	Marks__c	Auto Number		
Candidate Id	Internal_result__c	Email		
Course Id	Course_Id__c	Email		

3.2.3. Lightning App

➤ Create the Candidate Internal Result Card App



3.2.4. User

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. The user account identifies the user, and the user account settings determine what features and records the user can access.

Creation of User

The screenshot shows the Salesforce 'Users' setup page in a web browser. The browser's address bar shows the URL: `puratchithalaivardmgarats6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GIAv9%3Fnoedir...`. The Salesforce interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A left sidebar contains a search bar and a list of navigation items: 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The 'Users' item is selected and highlighted. The main content area is titled 'User SNEGA B' and includes a 'User Profile Help for this Page' icon. Below the title is a row of links: 'Permission Set Assignments', 'Permission Set Assignments: Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Connected Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'. The 'User Detail' section contains a table with user information and a list of roles with checkboxes.

User Detail	
Name	SNEGA B
Alias	SB
Email	snegab424@gmail.com
Username	snegabalaj4243@gmail.com
Nickname	User16803353942313091205
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Role	
User License	Salesforce
Profile	Standard User
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"/>
Mobile Push Registrations	View

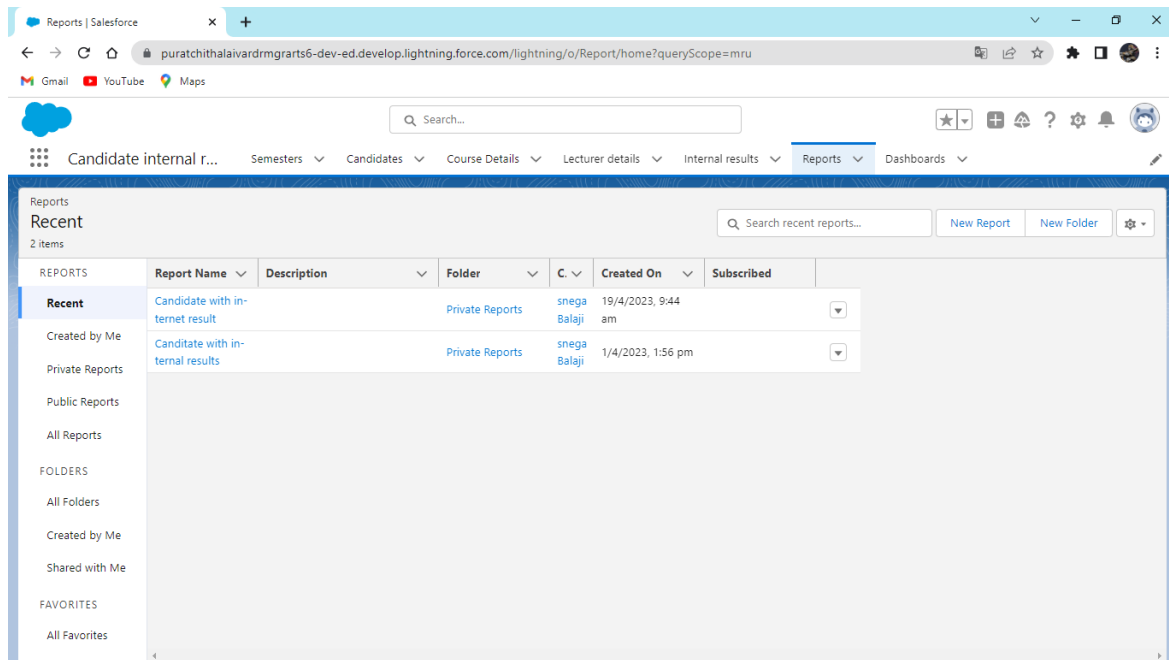
3.2.5. Reports

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.

Creating a Report

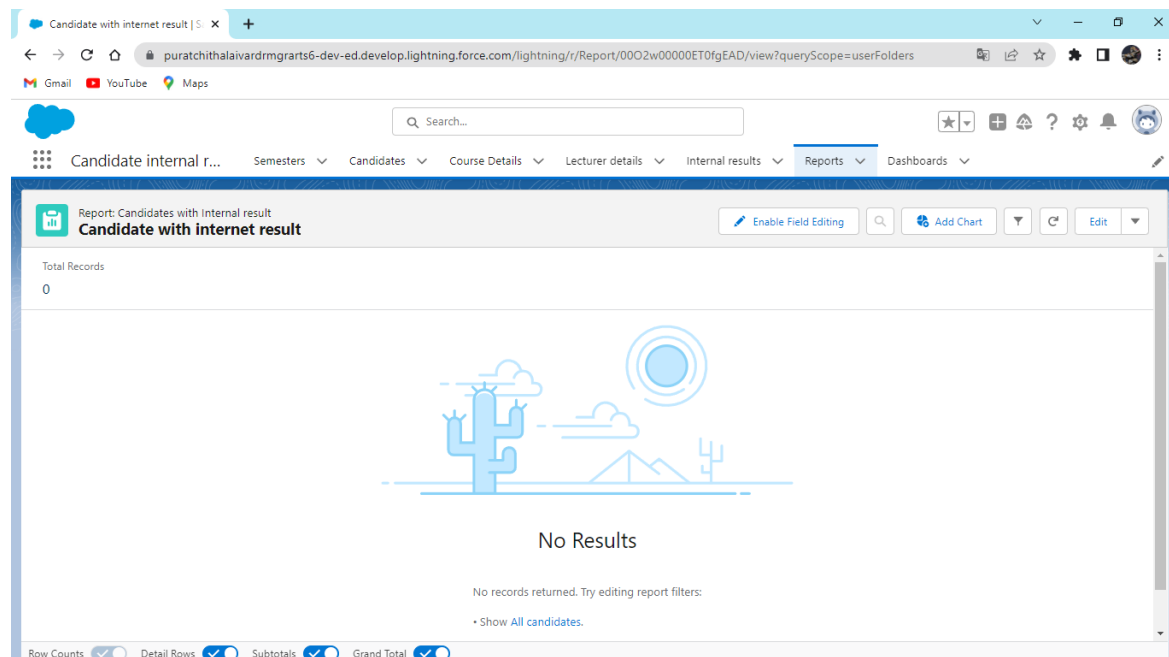
➤ *Candidate with Candidate Marks*

Candidate with Candidate Marks



The screenshot shows the Salesforce Reports interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu on the left lists 'Candidate internal r...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer details', 'Internal results', 'Reports', and 'Dashboards'. The 'Reports' section is active, displaying a 'Recent' list of 2 items. The table below shows the details of these reports.

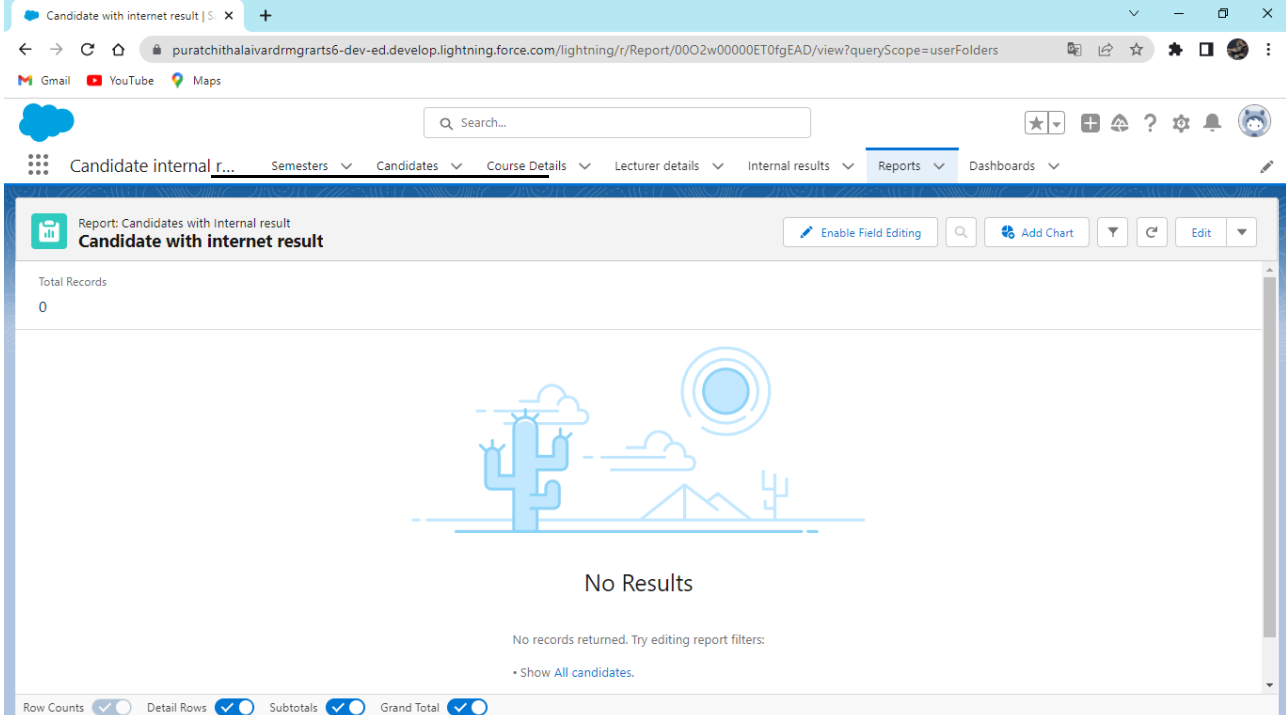
REPORTS	Report Name	Description	Folder	C.	Created On	Subscribed
Recent	Candidate with internet result		Private Reports	snega Balaji	19/4/2023, 9:44 am	
Created by Me	Candidate with internet results		Private Reports	snega Balaji	1/4/2023, 1:56 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						



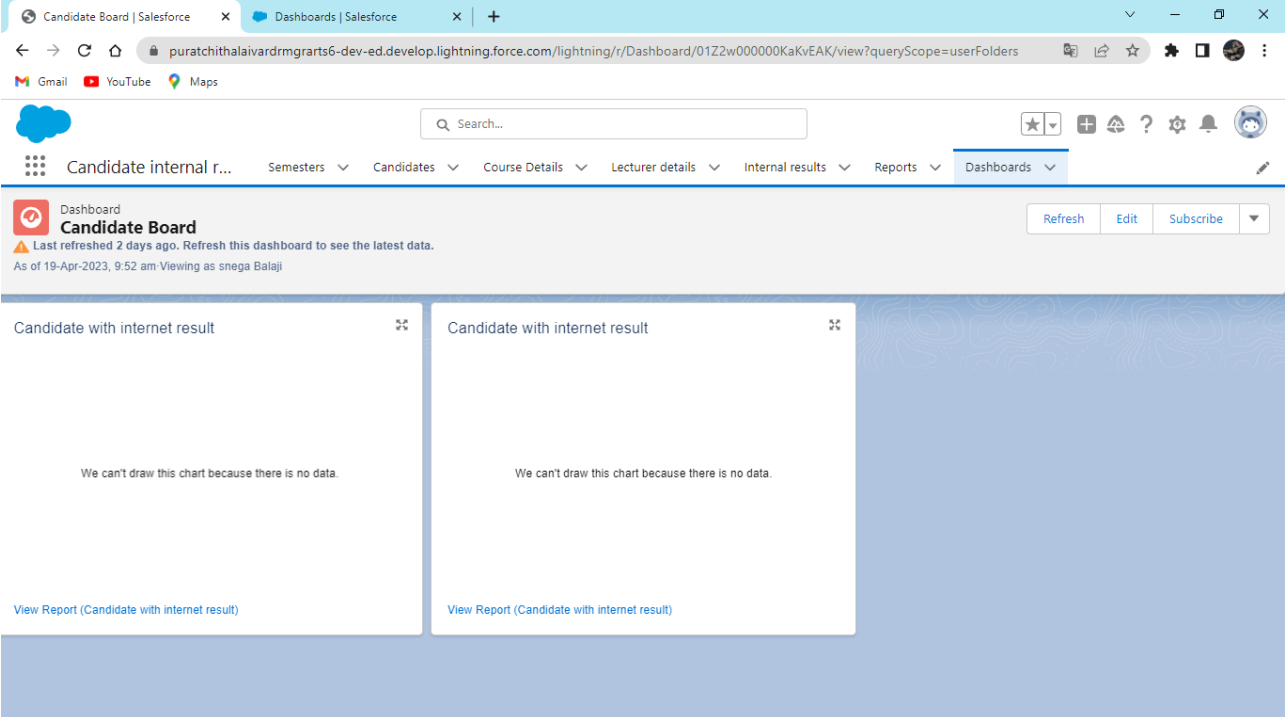
The screenshot shows the Salesforce Report view for the report 'Candidate with internet result'. The report title is 'Candidate with internet result'. The 'Total Records' section shows 0 records. The main content area displays a 'No Results' message with a cactus illustration. Below the message, it states 'No records returned. Try editing report filters:' and provides a link to 'Show All candidates.' The bottom of the page features a row of toggle switches for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are currently turned on.

3.2.6. Dashboards

Creating a Dashboards



This screenshot shows a Salesforce report titled "Candidate with internet result". The report is currently empty, displaying a "No Results" message with a cactus illustration. The interface includes a top navigation bar with tabs for Semesters, Candidates, Course Details, Lecturer details, Internal results, Reports, and Dashboards. The report header shows "Total Records: 0" and a "No Results" message: "No records returned. Try editing report filters: • Show All candidates." The bottom of the report has checkboxes for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are checked.



This screenshot shows a Salesforce dashboard titled "Candidate Board". The dashboard is currently empty, displaying two placeholder cards for reports titled "Candidate with internet result". Each card contains the message: "We can't draw this chart because there is no data." and a link to "View Report (Candidate with internet result)". The dashboard header shows "Last refreshed 2 days ago. Refresh this dashboard to see the latest data." and "As of 19-Apr-2023, 9:52 am Viewing as sneha Balaji". The top navigation bar includes tabs for Semesters, Candidates, Course Details, Lecturer details, Internal results, Reports, and Dashboards.

4. Trailhead Profile Public URL :

Team Lead - <https://trailblazer.me/id/sbalaji85>
Team Member 1 - <https://trailblazer.me/id/nnivi10>
Team Member 2 - <https://trailblazer.me/id/ivenkatesan1>
Team Member 3 - <https://trailblazer.me/id/vvinodha>

5. ADVANTAGES & DISADVANTAGES :

ADVANTAGES:

- ❖ Conversely, internal candidates are already part of your workplace, so the time you need to find and engage those candidates is much less.
- ❖ It's also easier to assess internal candidates because: They're prescreened for culture fit.
- ❖ Their track record is easily accessible.

DISADVANTAGES:

- ❖ The pool of people the role is aimed at is smaller than if it was advertised externally.
- ❖ You may be missing out on the best person for the job if they're not already employed by you.

6. APPLICATIONS :

- ❖ Internal assessment deals with the existing business processes, organizational structure, information and communications technology (ICT) environment, and performance indicators.
- ❖ External assessment involves a verification of the customer requirements, a competitive analysis, and a best-in-class definition.

7. CONCLUSION :

- ❖ Internal recruitment is a highly effective method of recruiting internal employees using various methods such as promotions, transfers and internal job postings.
- ❖ It offers multiple advantages like lower costs, less recruitment & induction time, lower risk, etc.

8. FUTURE SCOPE :

- ❖ The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations.

