Implementing CRM for Result tracking of a candidate with internal marks.

Milestone-2:Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. 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:

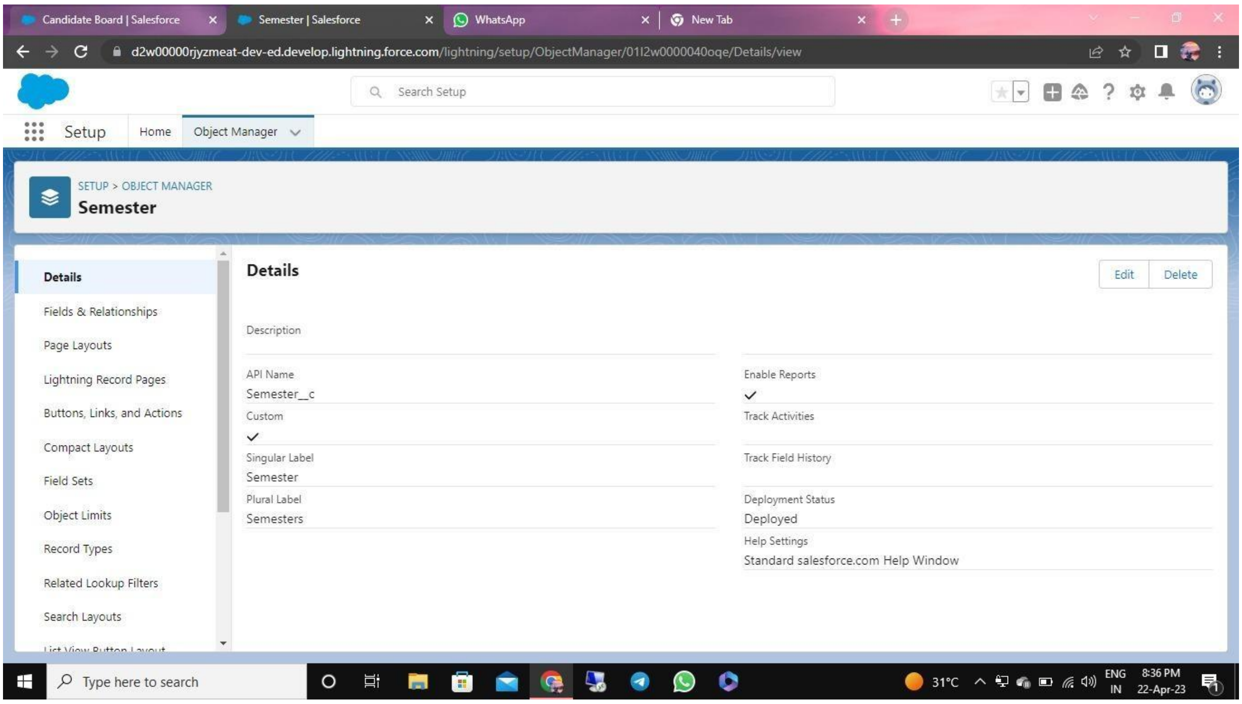
1.Semester
2.Candidate
3.Course Details
4.Lecturer Details
5.Internal results

Activity-1:
To Create an object:
Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e. Semester, Candidate, Course, Details, Lecturer Details, Internal Results.
The below steps will assist you in creating those objects.

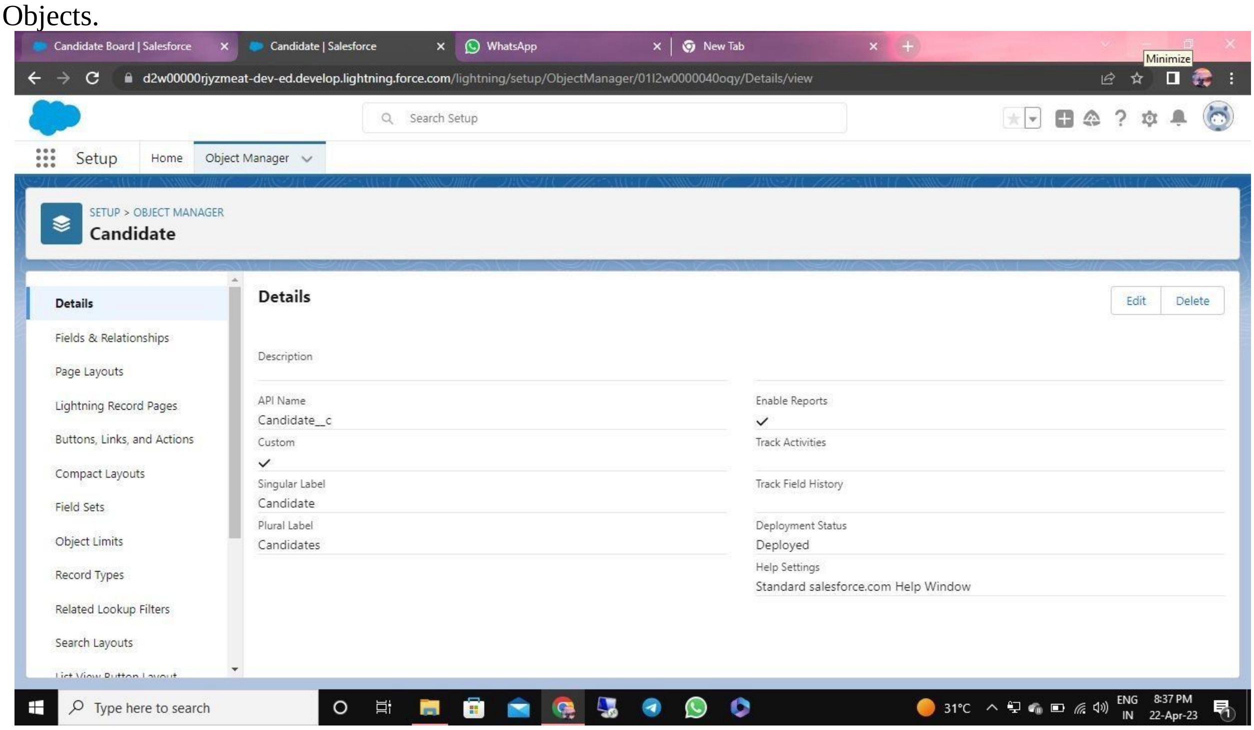
- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

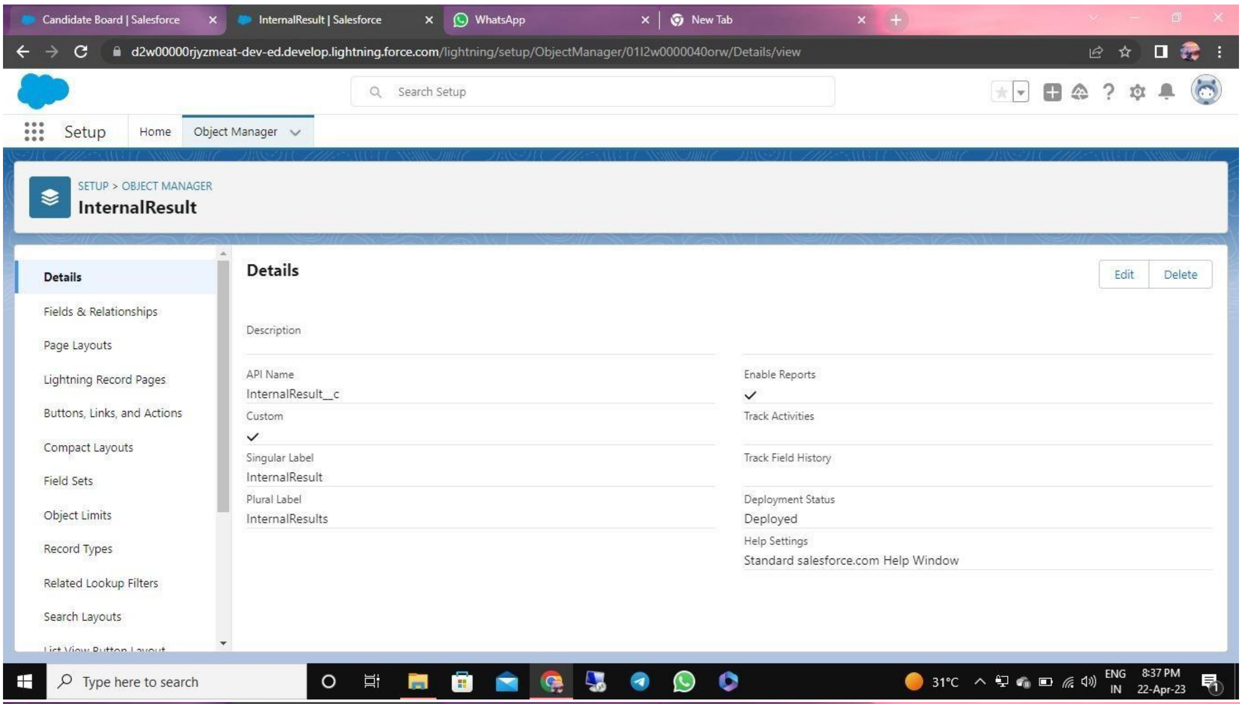
On the Custom Object Definition page, create the object as follows:

- Label: Semester
- Plural Label: Semesters
- Record Name: Semester Name
- Check the Allow Reports checkbox ● Check the Allow Search checkbox ● Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.



Activity-2: Follow Similar steps to create Candidate,Course Details,Lecturer Details,Internal results Objects.

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InternalResult | Salesforce
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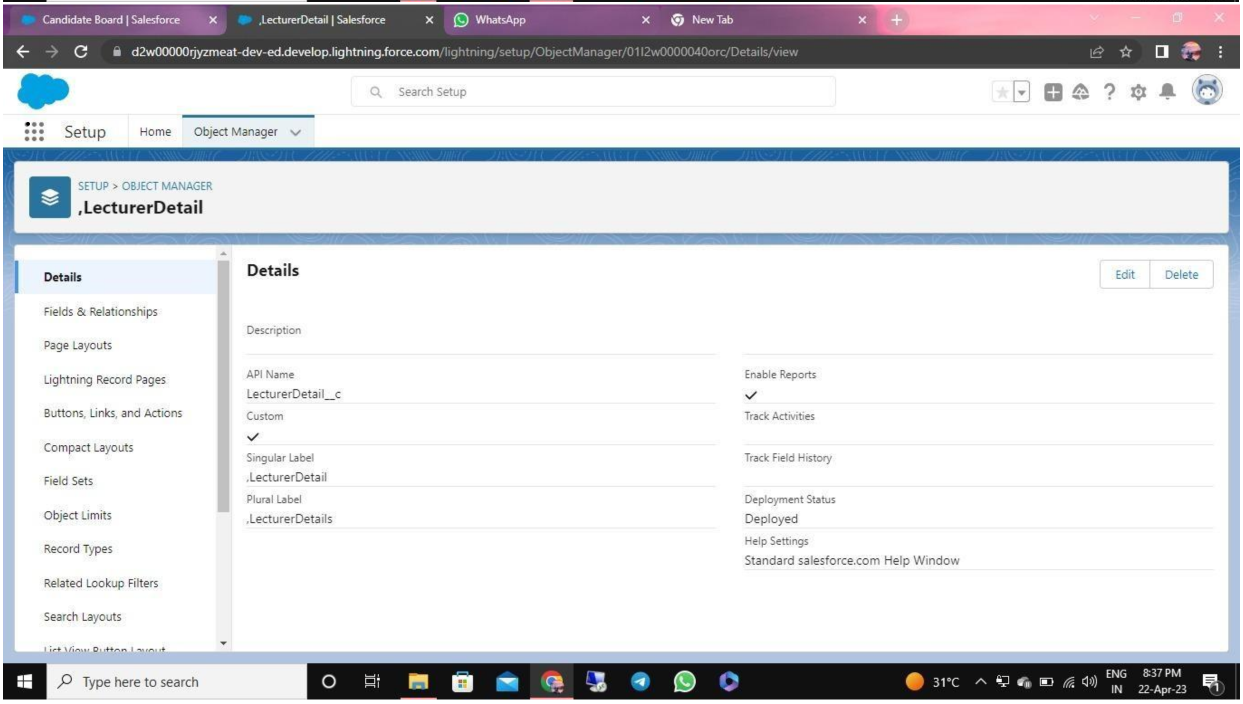
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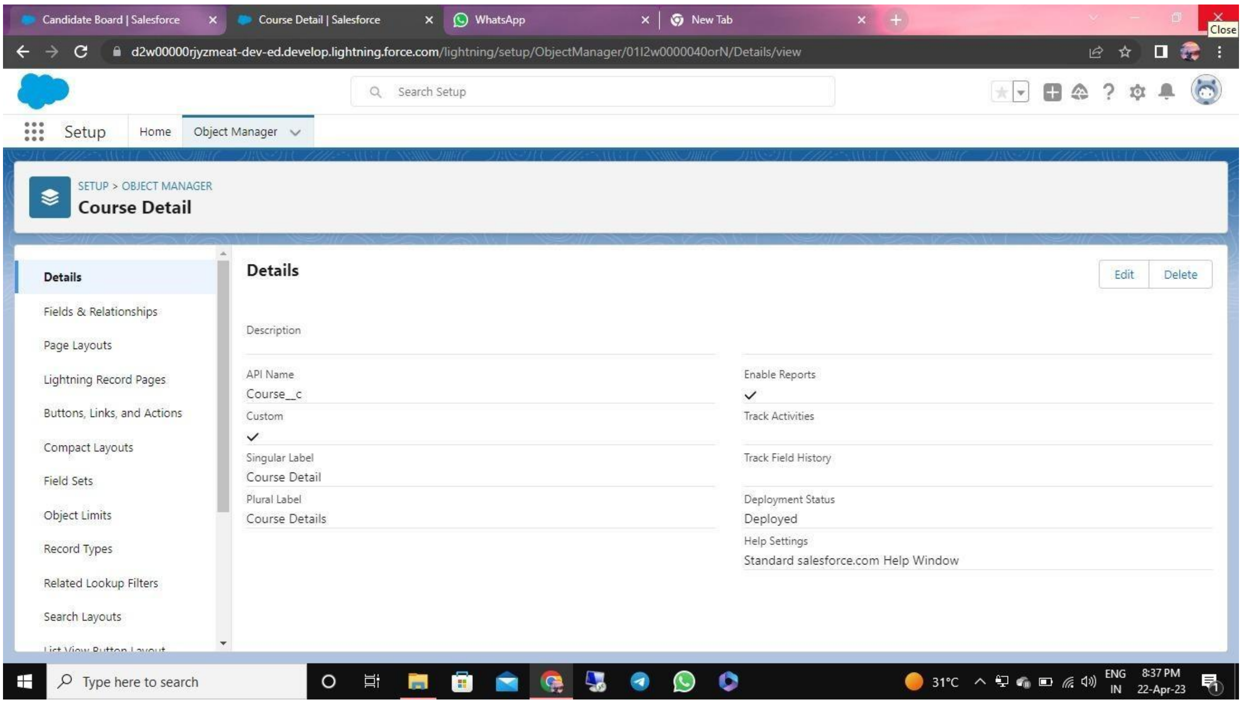


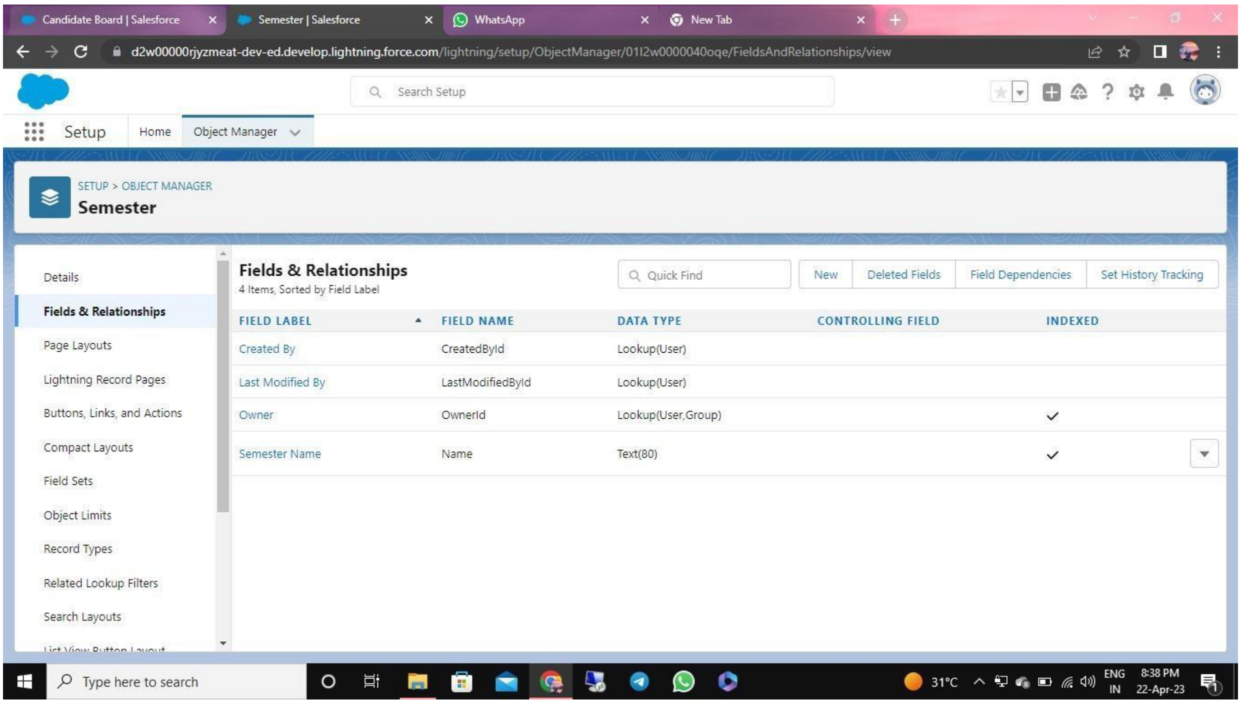
Milestone -2:Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

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

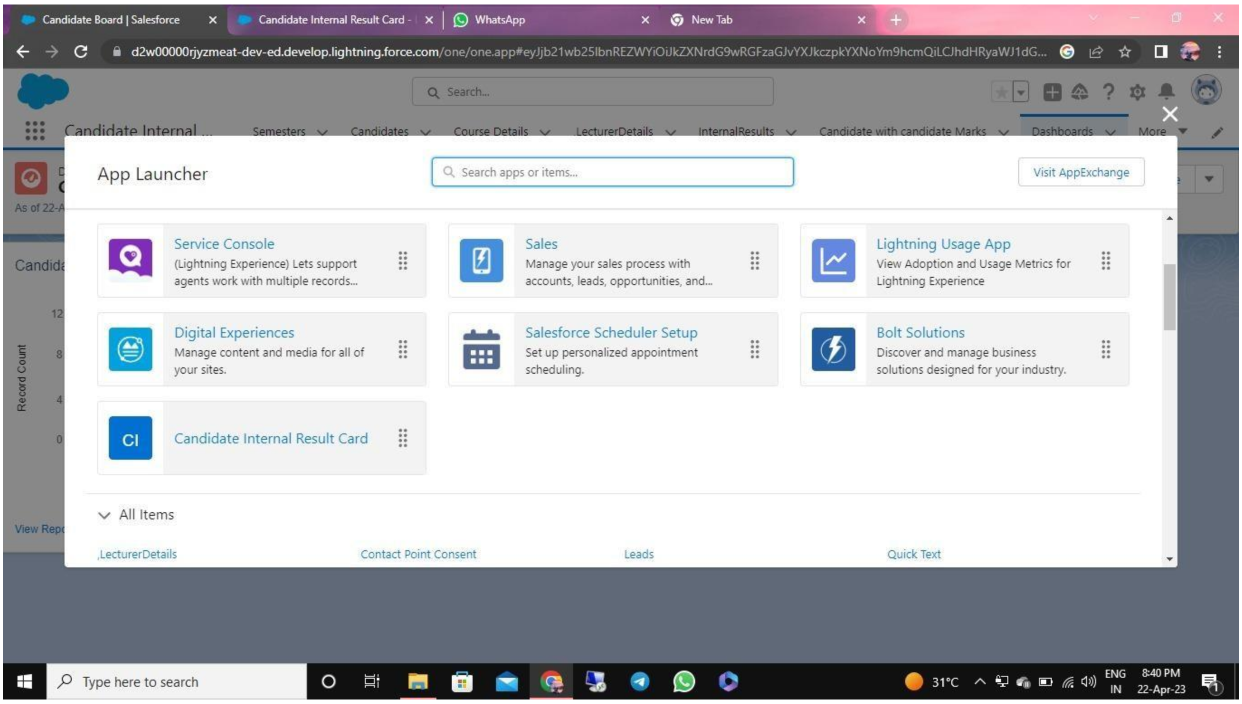


Milestone -3:Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

Activity-1:
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, Lecturer Details, Internal Results 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.



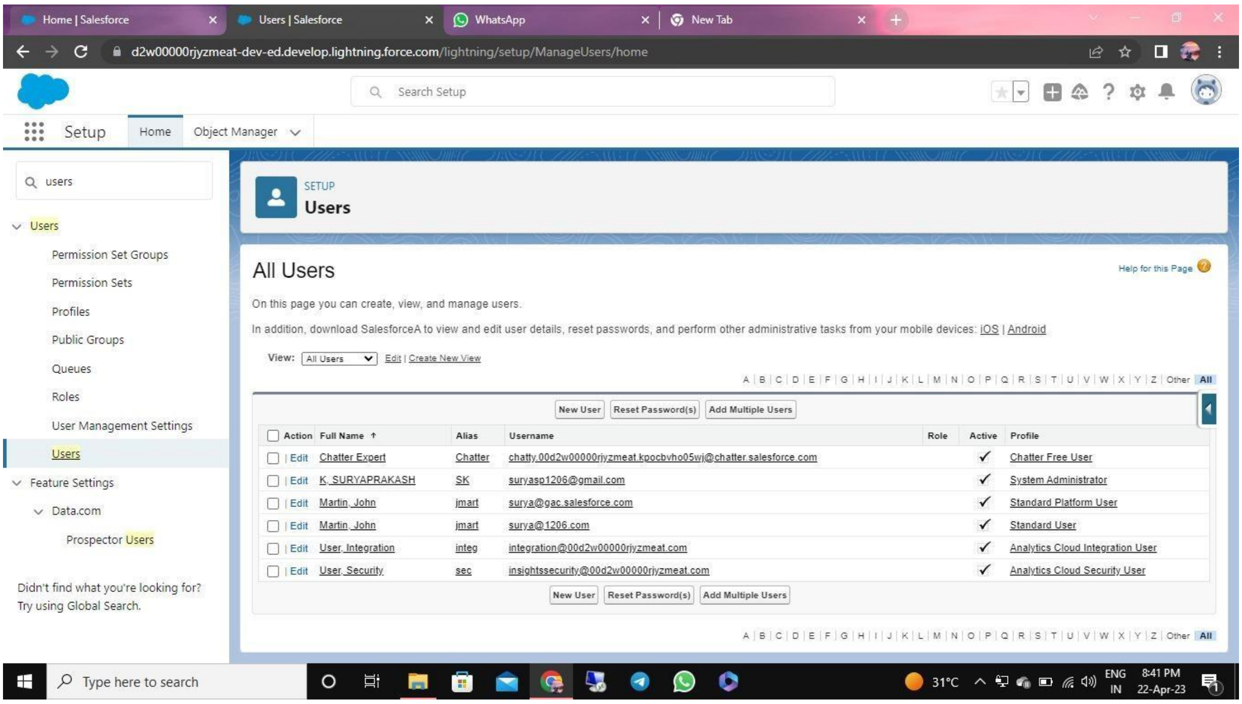
Milestone-4: Users

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.

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.



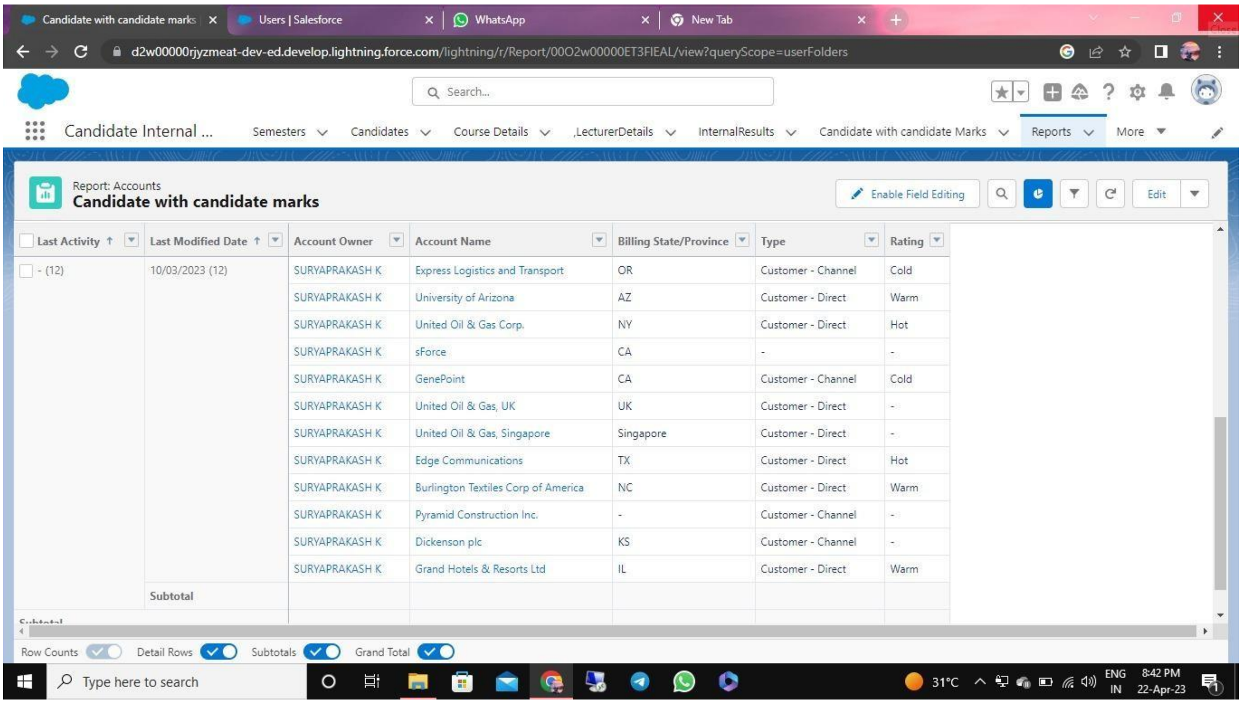
Milestone-5: Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

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.



Last Activity	Last Modified Date	Account Owner	Account Name	Billing State/Province	Type	Rating
- (12)	10/03/2023 (12)	SURYAPRAKASH K	Express Logistics and Transport	OR	Customer - Channel	Cold
		SURYAPRAKASH K	University of Arizona	AZ	Customer - Direct	Warm
		SURYAPRAKASH K	United Oil & Gas Corp.	NY	Customer - Direct	Hot
		SURYAPRAKASH K	sForce	CA	-	-
		SURYAPRAKASH K	GenePoint	CA	Customer - Channel	Cold
		SURYAPRAKASH K	United Oil & Gas, UK	UK	Customer - Direct	-
		SURYAPRAKASH K	United Oil & Gas, Singapore	Singapore	Customer - Direct	-
		SURYAPRAKASH K	Edge Communications	TX	Customer - Direct	Hot
		SURYAPRAKASH K	Burlington Textiles Corp of America	NC	Customer - Direct	Warm
		SURYAPRAKASH K	Pyramid Construction Inc.	-	Customer - Channel	-
		SURYAPRAKASH K	Dickenson plc	KS	Customer - Channel	-
		SURYAPRAKASH K	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm
	Subtotal					

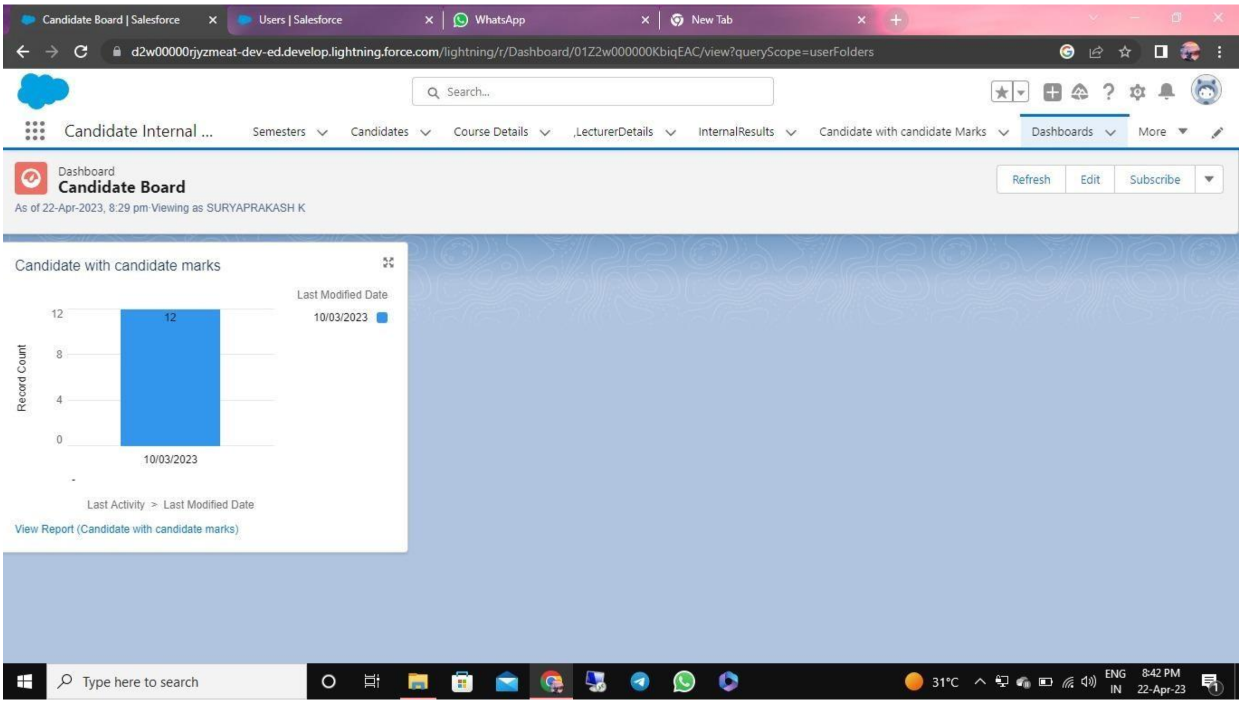
Milestone-6: Dashboards:

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

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 Marks by 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:

Team Lead – https://trailblazer.me/id/suryak30

Team Member 1 – https://trailblazer.me/id/ssutharsan

5. Advantages:

1. ***Centralized Data Management***: A CRM system can provide a centralized platform to store and manage all the data related to the candidate's internal marks, including their academic performance, attendance, and other relevant details. This can help in ensuring that the data is easily accessible, accurate, and up-to-date.

2. ***Automated Result Generation***: With a CRM system, it is possible to automate the process of generating results for the candidate based on their internal marks. This can save time and reduce errors associated with manual result calculation.

3. ***Better Communication***: A CRM system can help in improving communication between the candidate and the institution by providing them with regular updates on their academic performance, attendance, and other relevant information. This can help in building a stronger relationship between the candidate and the institution.

4. ***Data Analysis*****:** A CRM system can provide insights into the candidate's academic performance by analysing their internal marks over time. This can help in identifying areas where the candidate needs improvement and take corrective actions accordingly.

5.1 Disadvantages:

1. ***Cost:*** Implementing a CRM system can be expensive, especially if you need to purchase licenses for multiple users or hire external consultants to help with the implementation.
2. ***Complexity:*** CRM systems can be complex to set up and maintain, especially if you have limited technical expertise. This can lead to delays or errors in implementing the system, which could impact the accuracy of the results.
3. ***Data Security:*** Storing sensitive data such as student marks and personal information in a CRM system requires strong security measures to protect against data breaches. This can add additional complexity and cost to the implementation.
4. ***Resistance to Change:*** Implementing a new system can be met with resistance from staff and students who are used to a different way of doing things. It may take time and effort to get everyone on board with using the new system.

6.Applications:

1. ***Define your requirements:*** Before selecting a CRM system, you should define your requirements. This will help you to choose the right system for your needs. Some of the requirements you might want to consider include the ability to track candidates, record internal marks, and generate reports.
2. ***Choose a CRM system:*** Once you have defined your requirements, you can choose a CRM system that meets your needs. There are many CRM systems available, such as Salesforce, HubSpot, and Zoho CRM. You should choose a system that is user-friendly and has features that match your requirements.

3. ***Customize the CRM system:*** Once you have chosen a CRM system, you should customize it to meet your specific needs. You can create custom fields to track internal marks and other information about candidates.

7.Conclusion:

1. ***Improved tracking:*** The CRM system allows for improved tracking of candidate results. This is because all the data is stored in a central location, which can be accessed by authorized personnel. This makes it easier to monitor the progress of candidates and to identify areas where improvements are needed.
2. ***Increased efficiency:*** With a CRM system, data can be entered once and shared across different departments. This reduces duplication of effort and ensures that everyone has access to the same information. This can lead to increased efficiency and productivity.
3. ***Better communication:*** The CRM system allows for better communication between different departments. For example, if a candidate is struggling in a particular subject, the information can be shared with the relevant department so that they can take appropriate action. This can lead to better collaboration and coordination between different departments.

8. Future Scope:

1. ***Define the objectives:*** The first step is to define the objectives of the CRM system. This includes identifying the key features required to track the results of the candidates such as candidate details, marks, internal assessment marks, attendance, etc. Also, define the future scope of the project such as integration with other systems, automation of certain tasks, etc.
2. ***Identify the CRM software:*** Choose a CRM software that meets the requirements identified in step 1. There are many CRM software options available, such as Salesforce, Zoho, HubSpot, etc. Research and compare the features, pricing, and user reviews before making a decision.
3. ***Customize the CRM:*** Once the CRM software is chosen, customize it according to the requirements. Create custom fields for candidate details, marks, attendance, etc. Also, create dashboards and reports to track the progress of the candidates.