

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

(Project Report)

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

INTRODUCTION:

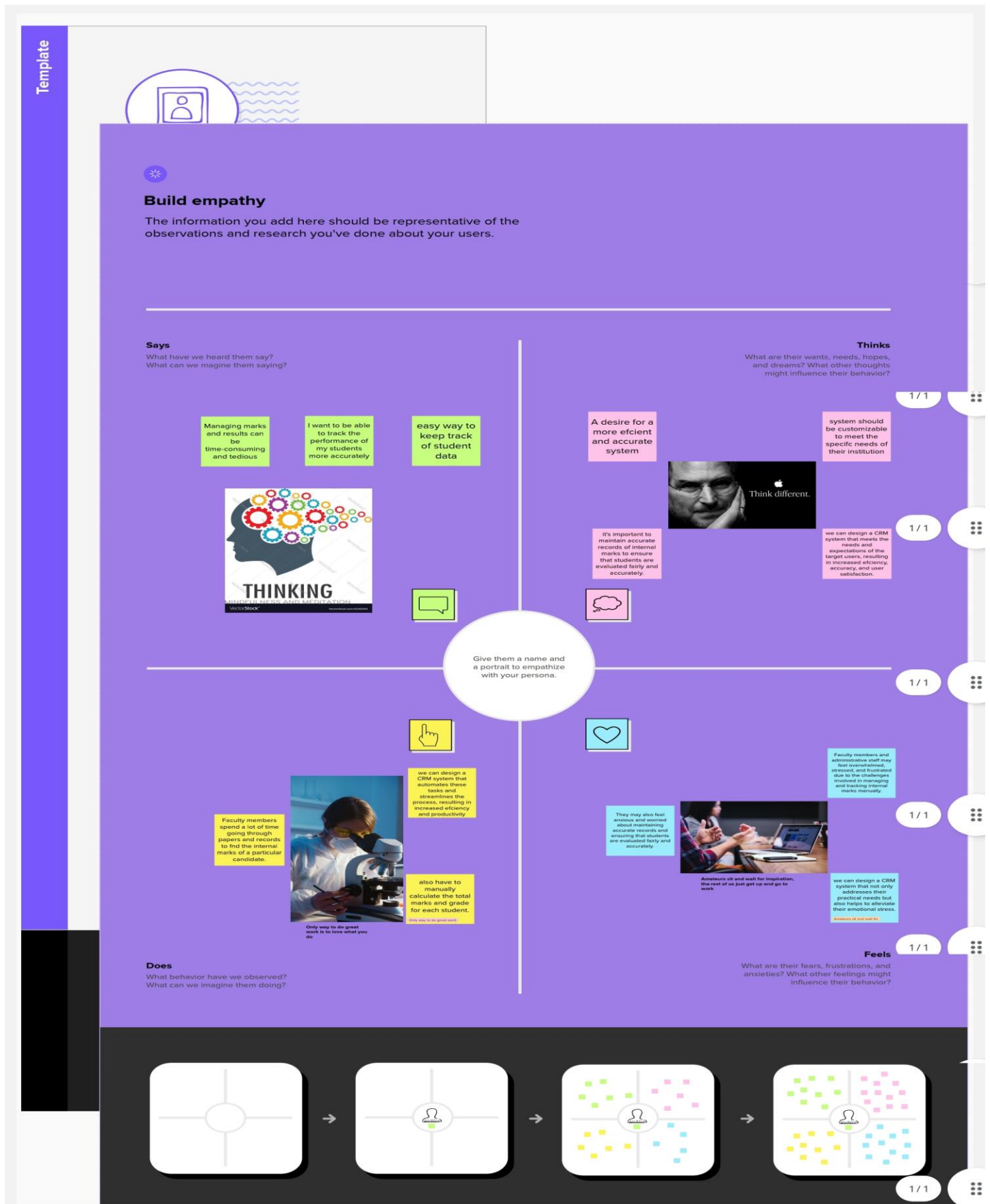
1. Overview

A CRM system is being used to track candidate results in schools and colleges. The administrator creates base data, while lecturers create internal results. The Dean is the only one who can update results after re-evaluation, which can be initiated by candidates.

2. Purpose

- 1.It helps to manage candidate details.
- 2.Regular feedback & continuous evaluation of candidates performance.
- 3.The project can helps you get the most up to date and accurate information.
- 4.The project can be use very to every users.
- 5.It was cloud based software so it was effective use anyone.

2.1 Empathy Map



2.2 Ideation and Brainstroming Map

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

TIP

You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

Person 1

The CRM system must have a robust and secure system of data storage and retrieval. The system must be able to handle a large volume of data and be able to retrieve it quickly and accurately.

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Person 2

The system must be able to handle a large volume of data and be able to retrieve it quickly and accurately.

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Person 3

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Person 4

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RESULT:

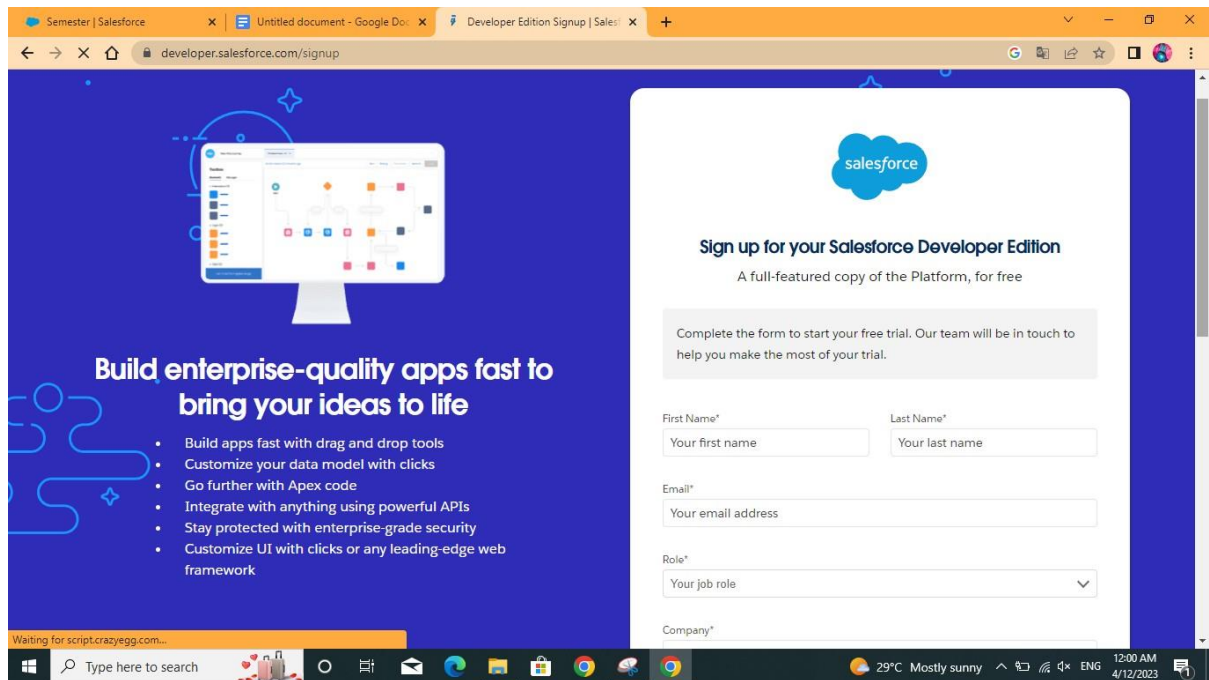
3.1 Data Model:

Object Name	Fields in the Object	
Obj 1	Field Label	Data type
	Label	Semester
	Plural Label	Semesters
	Record Name	Semesters Name

Obj 2		
	Field Label	Data type
	Label	Candidate
	Plural Label	Candidates
Obj 3	Record Name	Candidates Name
	Field Label	Data type
	Label	Course Details
Obj 4	Plural Label	Courses Details
	Record Name	Courses Name
	Field Label	Data type
Obj 5	Label	Lecturer Details
	Plural Label	Lecturers Details
	Record Name	Lecturers Name
Obj 5	Field Label	Data type
	Label	Internal mark
	Plural Label	Internal marks
	Record Name	Internal result

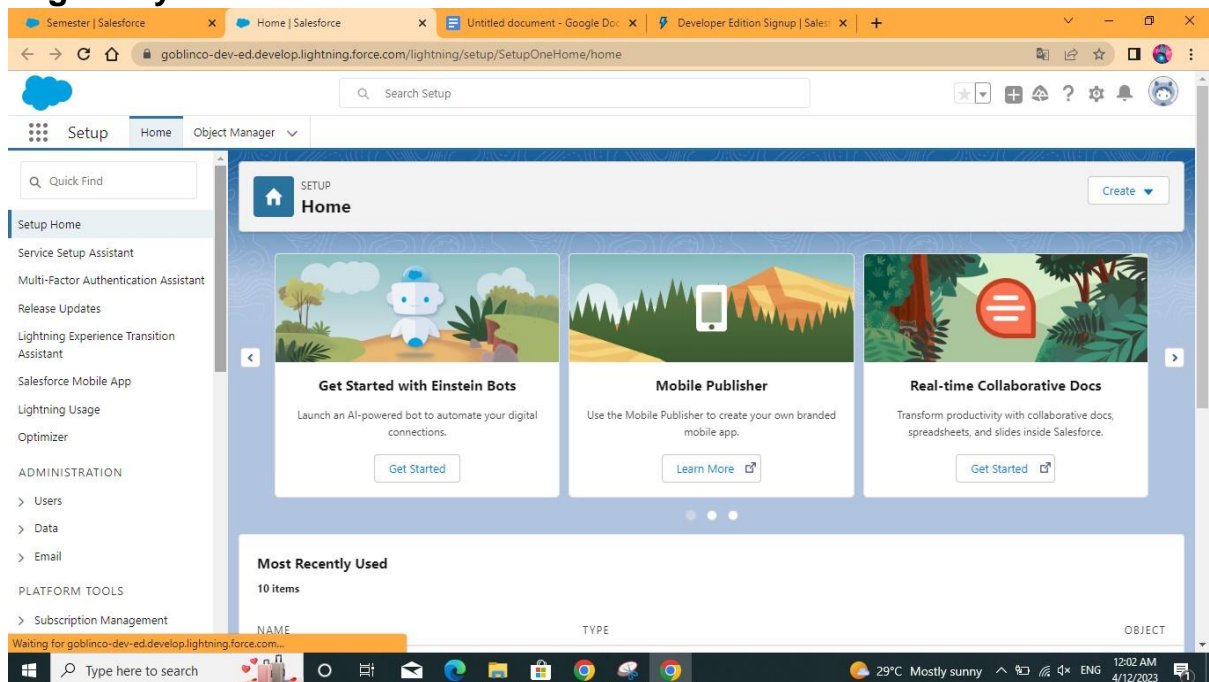
3.2 Activity & Screenshot

Activity 1: Creating developer account



Open salesforce developer signin page and enter all valid details.

Login to your salesforce account:



After finish the signin and verify your account then login the salesforce developer page.

Activity 2: objects

Setup Home Object Manager

Object Manager

51 Items, Sorted by Label

Quick Find Schema Builder Create

Custom Object Custom Object from Spreadsheet

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		

https://goblinco-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Screenshot_2023_0...jpg Show all

Setup Home Object Manager

New Custom Object

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name --None--

Enter Record Name Label and Format

The Record Name appears in name layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name".

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Candidates Name	People	We have 1000 students in our college.
Edit Del	Courses details	Building	Ten courses
Edit Del	Internal marks	Pencil	Internal marks
Edit Del	Lectures details	People	Hundred lectures
Edit Del	Semesters	Books	six semesters

Web Tabs

No Web Tabs have been defined.

Go to objects and select custom objects for semester, candidate, course details, lecturer details and internal results.

Activity 3: Fields and Relationship

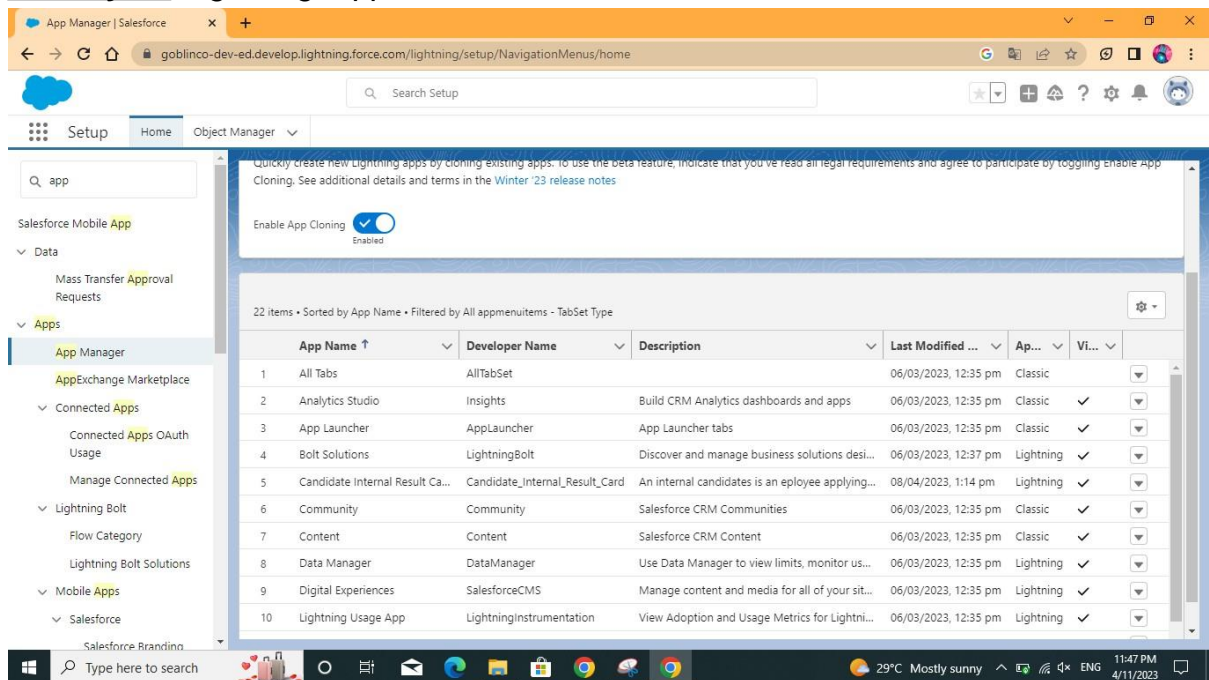
Fields & Relationships

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name__c	Text(20)		
Semester Name	Name	Text(80)		✓

Open object manager and select fields and relationship option. Then move the custom objects.

Activity 4: Lightning App

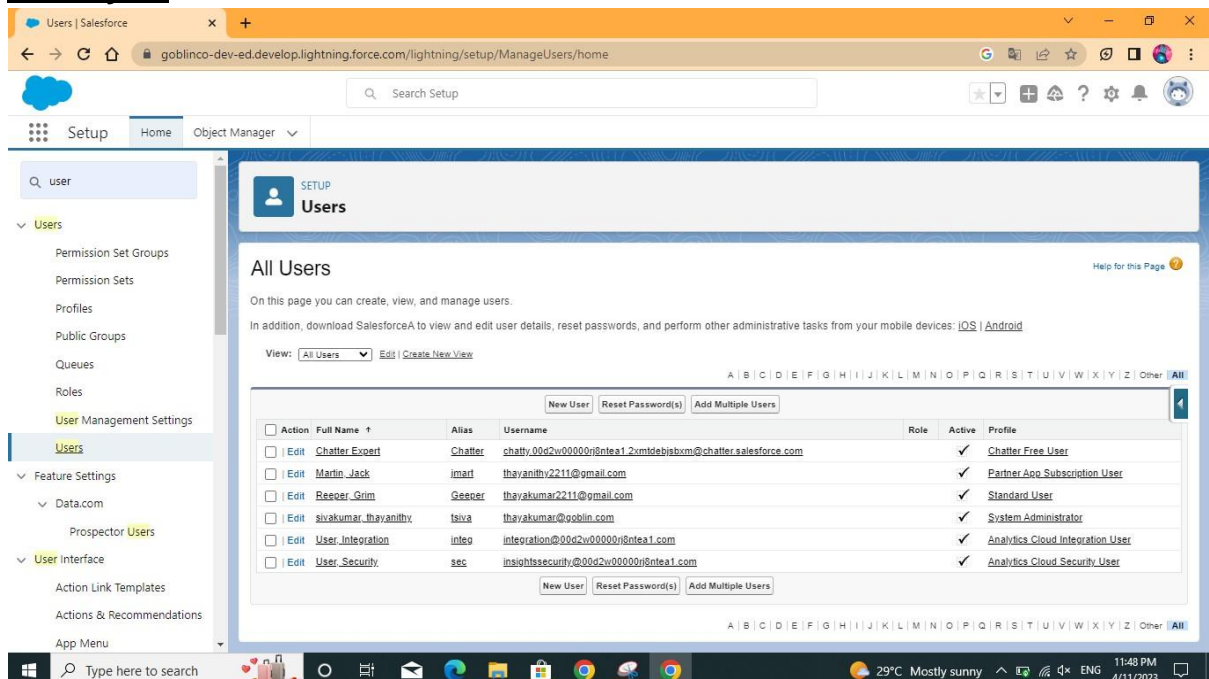


The screenshot shows the Salesforce App Manager setup page. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'App Manager' and shows a list of 22 items, sorted by App Name. The 'Enable App Cloning' toggle is turned on. Below the toggle, there is a table listing various apps.

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
1	All Tabs	AllTabSet		06/03/2023, 12:35 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	06/03/2023, 12:35 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	06/03/2023, 12:35 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions desi...	06/03/2023, 12:37 pm	Lightning	✓
5	Candidate Internal Result Ca...	Candidate_Internal_Result_Card	An internal candidates is an employee applying...	08/04/2023, 1:14 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	06/03/2023, 12:35 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	06/03/2023, 12:35 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor us...	06/03/2023, 12:35 pm	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sit...	06/03/2023, 12:35 pm	Lightning	✓
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightni...	06/03/2023, 12:35 pm	Lightning	✓

Open app manager and enable app cloning then create the lightning app.

Activity 5: Users

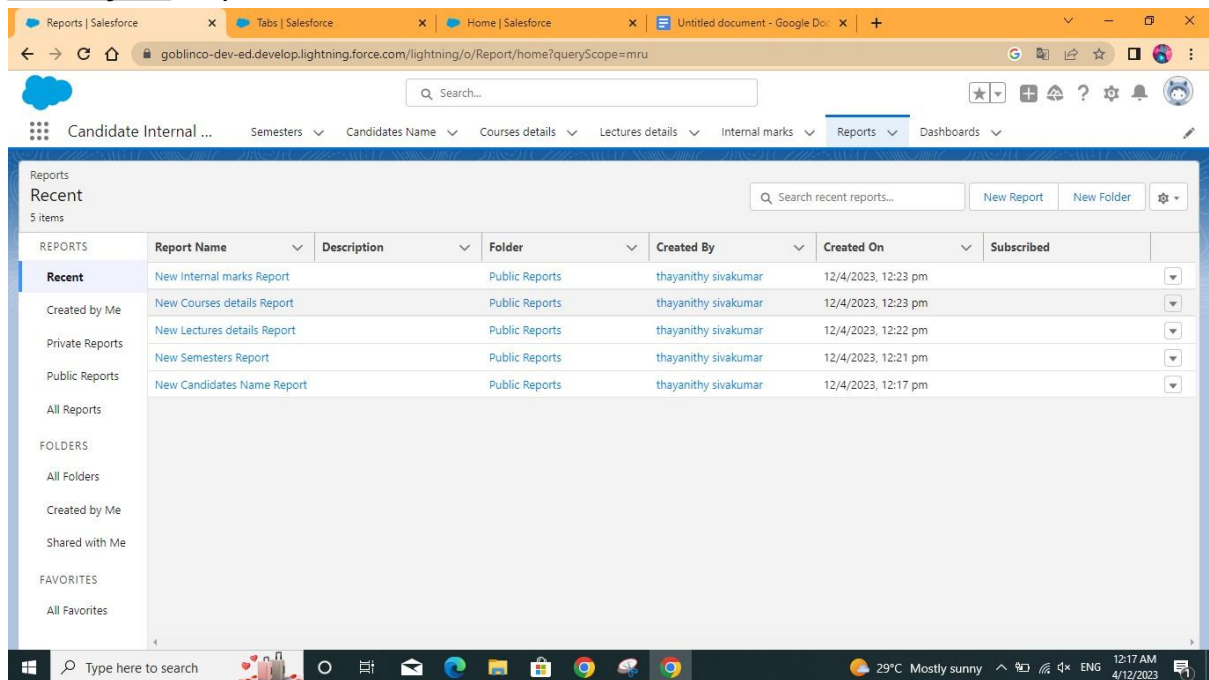


The screenshot shows the Salesforce Users management page. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'Users' and shows a list of users. The 'View' dropdown is set to 'All Users'. Below the dropdown, there is a table listing various users.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d2w00000n8ntea1.2xmtdabjxvm@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Martin Jack	martj	thavanih@2211@gmail.com		✓	Partner App Subscription User
<input type="checkbox"/> Edit	Reeper Grim	Geener	thavakumar2211@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	sivakumar.thavanih	tsiva	thavakumar@goblin.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000n8ntea1.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w00000n8ntea1.com		✓	Analytics Cloud Security User

Open users and create new user.

Activity 6: Reports



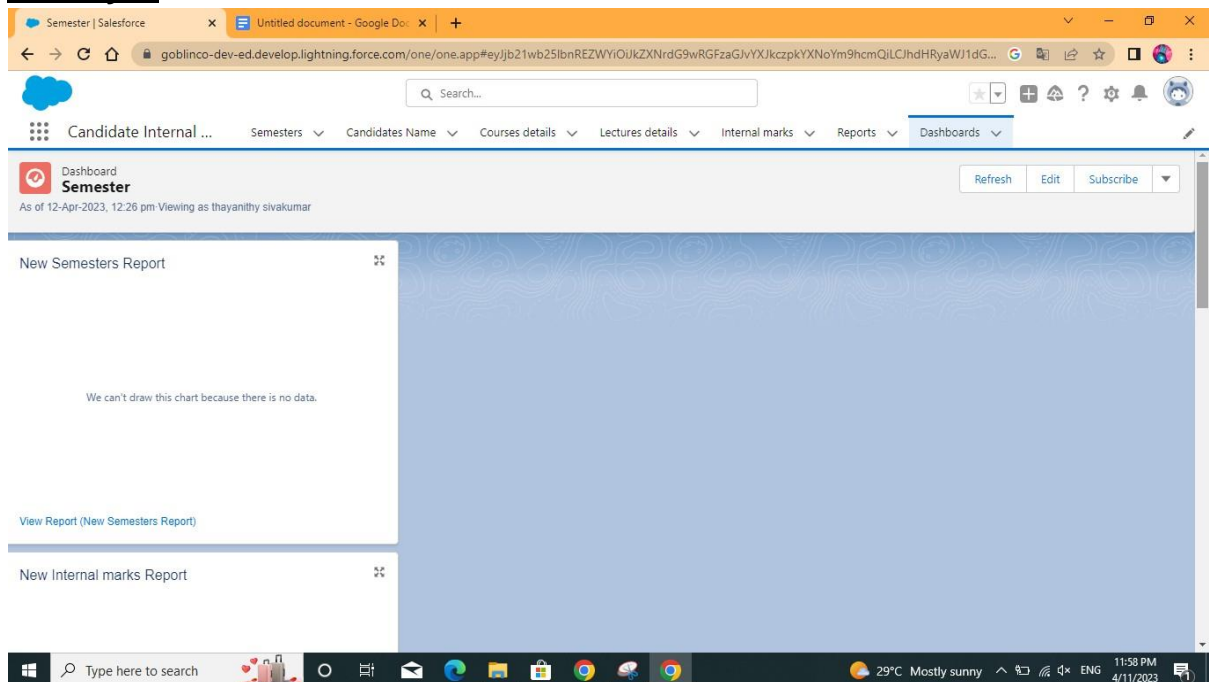
The screenshot shows the Salesforce Reports interface. The top navigation bar includes tabs for 'Reports | Salesforce', 'Tabs | Salesforce', 'Home | Salesforce', and 'Untitled document - Google Do...'. The main navigation menu on the left includes 'Candidate Internal ...', 'Semesters', 'Candidates Name', 'Courses details', 'Lectures details', 'Internal marks', 'Reports', and 'Dashboards'. The 'Reports' section is active, displaying a 'Recent' list of 5 items. The table below lists the reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Internal marks Report		Public Reports	thyanithy sivakumar	12/4/2023, 12:23 pm	
Created by Me	New Courses details Report		Public Reports	thyanithy sivakumar	12/4/2023, 12:23 pm	
Private Reports	New Lectures details Report		Public Reports	thyanithy sivakumar	12/4/2023, 12:22 pm	
Public Reports	New Semesters Report		Public Reports	thyanithy sivakumar	12/4/2023, 12:21 pm	
	New Candidates Name Report		Public Reports	thyanithy sivakumar	12/4/2023, 12:17 pm	

The bottom of the screenshot shows the Windows taskbar with the search bar, taskbar icons, and system tray showing 29°C Mostly sunny, 12:17 AM, 4/12/2023.

Open reports and add all custom objects and save the all reports in public.

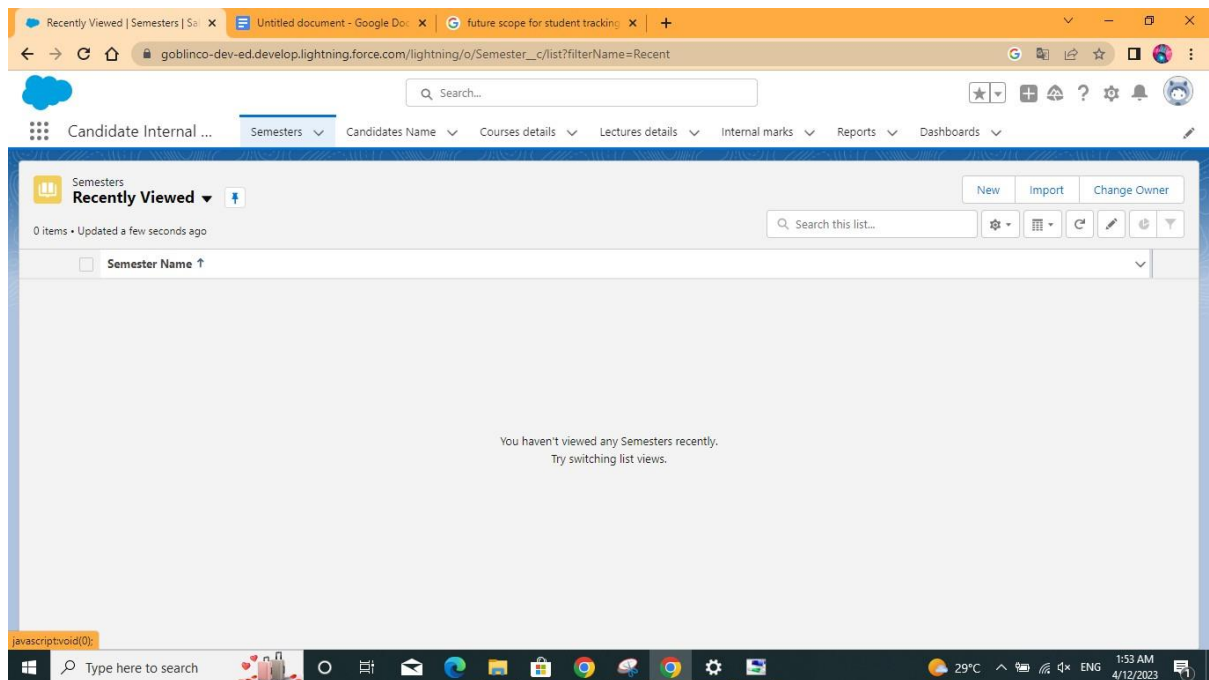
Activity 7: Dashboards



The screenshot shows the Salesforce Dashboard interface. The top navigation bar includes tabs for 'Semester | Salesforce' and 'Untitled document - Google Do...'. The main navigation menu on the left includes 'Candidate Internal ...', 'Semesters', 'Candidates Name', 'Courses details', 'Lectures details', 'Internal marks', 'Reports', and 'Dashboards'. The 'Dashboards' section is active, displaying a 'Semester' dashboard. The dashboard header shows 'Dashboard Semester' and 'As of 12-Apr-2023, 12:26 pm Viewing as thyanithy sivakumar'. The dashboard content area shows two report components: 'New Semesters Report' and 'New Internal marks Report'. The 'New Semesters Report' component displays a message: 'We can't draw this chart because there is no data.' Below the message is a link: 'View Report (New Semesters Report)'. The bottom of the screenshot shows the Windows taskbar with the search bar, taskbar icons, and system tray showing 29°C Mostly sunny, 11:58 PM, 4/11/2023.

Open dashboard and create new dashboard then add component.

Activity 8: Candidate internal result card



Finally the candidate internal result card is successfully opened.

Trailhead Profile Public URL:

Team Lead-<https://trailblazer.me/id/yvinoth1>

Team Member 1-<https://trailblazer.me/id/ssiva453>

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

Team Member 3-<https://trailblazer.me/id/nven777TTT>

Project Report Template

Advantages & Disadvantage:

Advantage:

1. This app was very easy access anyone to use.
2. The data are only modify with deen.
3. This app for user friendly.
4. Only candidate see there internal marks.

Disadvantage:

1. Many peoples use the app in same time it was run slow.

Applications :

This app is used in school and colleges and its helps to manage any candidates details in same time. This app is user friendly so using methods are so simple. It was created based on cloud based system, so it stores many data.

Conclusion :

We will create the model for Result tracking system for Schools and Colleges.

Future scope :

This app was manage candidates all semester details. Deen can only change the internal results. Candidates details are very secured, so no one to access and see semesters details.