

**ARINGAR ANNA GOVERNMENT ARTS COLLEGE**

**MUSIRI - 621 211**

**DEPARTMENT OF MATHEMATICS**

**NAAN MUDHALVAN-SMART INTERNZ PROJECT**

PROJECT TITLE: IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS.

**SUBMITTED BY**

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# INTRODUCTION

HAVE A SUCCESSFUL PROJECT BASED EXPERIENTIAL LEARNING PROGRAM

CRM implementation is the process of [introducing a CRM system](#) to your business. It starts from choosing the right solution for your needs, and ends with

actively using it to streamline your business processes. However, maybe that's an overly-simplified account; implementation is a multi-stage process...

1. Identifying a problem that CRM solves
2. [Searching for an appropriate CRM system](#) for your business
3. Finding appropriate systems and testing it
4. Subscribing or buying the appropriate CRM platform
5. System set up and wider team implementation

The final stage includes migrating all your data, onboarding the team, educating them on the benefits of a CRM solution, customising the system, and adding all the necessary third-party integrations that make the CRM operation as smooth as possible.

1.1:Over view:

**Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer, Lecturer should have the ability to create Internal Results, Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results, Re-evaluation Can be initialized by Candidate for all Internal Results. Now only dean can update the marks after re-evaluation.**

## **1.2:Purpose:**

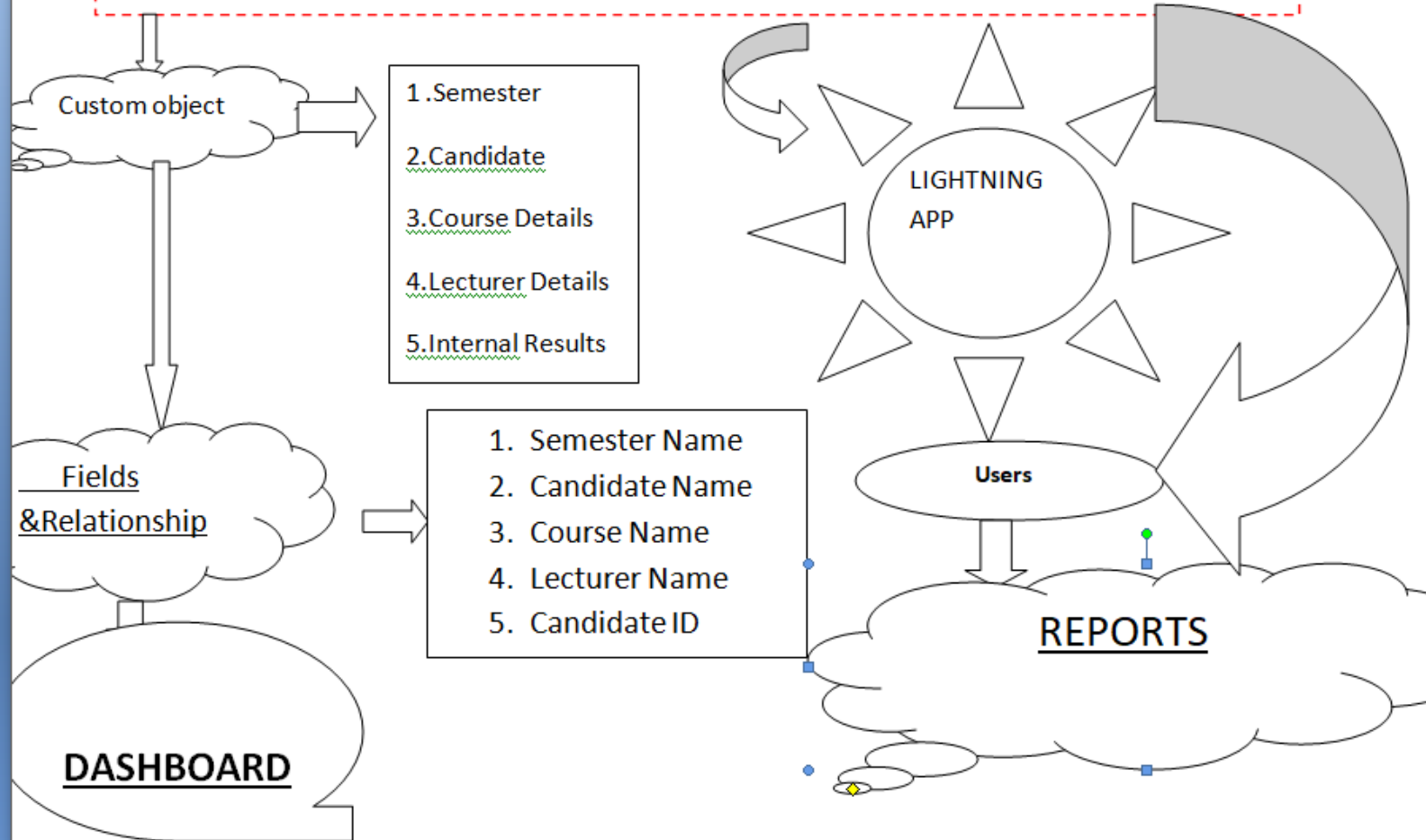
USE: THIS WILL LET YOU KNOW ABOUT RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS.

ACHIEVE: THIS PROJECT FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS TO KNOWN .

## **2. PROBLEM DEFINITION &DESIGN THINKING**

## 2.1: EMPATHY MAP

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



## 2.2: IDEATION & BRAINSTROMING MAP



### 3. RESULT:

#### 3.1: DATA MODEL:

Object Name	Fields in the Object	
Obj 1	Field label	Data type
	Semester	Text
	Semesters	Text
Obj2	Field label	Data type
	Candidate	Marks
	Candidates	Marks

#### 3.2 Activity and Screenshot:

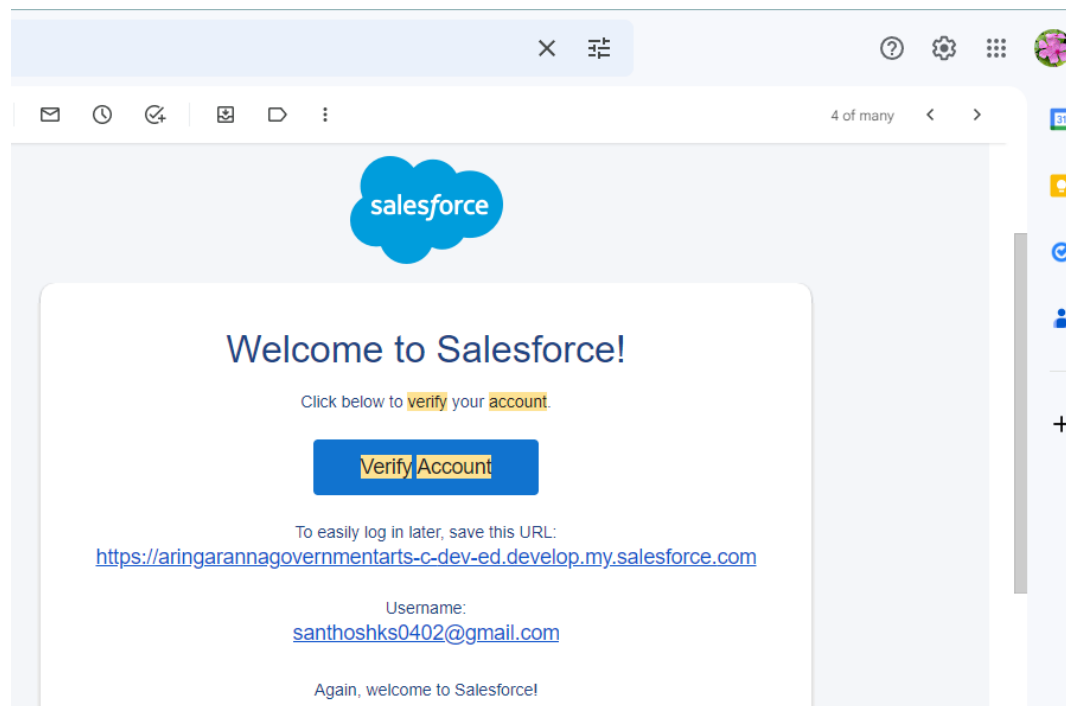
Milestone 1: Creation Salesforce Org.



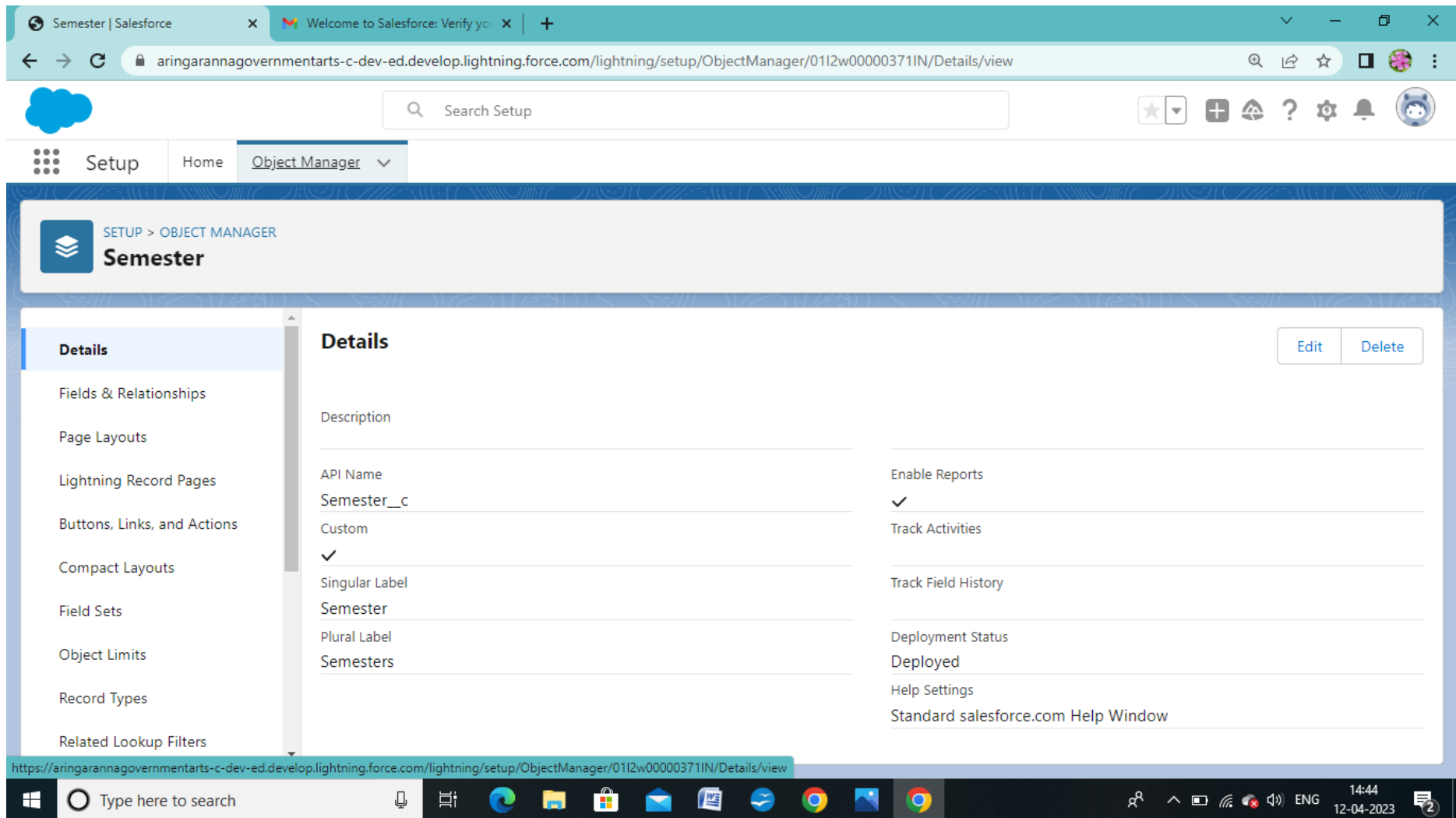
## Activity 1:

Creating a developer org.in salesforce.

Account Activation:



Milestone:2 Object



## Activity 2: Candidate

Browser tabs: Candidate | Salesforce, Welcome to Salesforce: Verify yo... | +

Address bar: aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048T6Z/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Candidate**

**Details** Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

**Details**

Description

API Name  
Candidate\_\_c

Custom  
✓

Singular Label  
Candidate

Plural Label  
Candidates

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

javascriptvoid(0);

Type here to search

14:44  
12-04-2023

Lecture Details:

Screenshot of the Salesforce Setup interface showing the details for a custom object named "Lecturer Detail".

**Browser Address Bar:** `aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048T78/Details/view`

**Setup Navigation:** Setup > Object Manager > Lecturer Detail

**Details Section:**

- Description:**
- API Name:** Lecturer\_Detail\_\_c
- Custom:** ☒
- Singular Label:** Lecturer Detail
- Plural Label:** Lecturer Details
- Enable Reports:** ☒
- Track Activities:**
- Track Field History:**
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

**Left Sidebar (Setup Menu):**

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

**Windows Taskbar:** Shows the date and time as 14:45 on 12-04-2023.

Course Details:

Course Detail | Salesforce x Welcome to Salesforce: Verify yo x +

aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048T6y/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Course Detail

**Details**

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

**Details**

EditDelete

Description

API Name

Course\_Details\_\_c

Custom

✓

Singular Label

Course Detail

Plural Label

Course Details

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Internal Results:

Internal result | Salesforce x Welcome to Salesforce: Verify yo x +

aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048T7D/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Internal result

**Details** Edit Delete

Description

API Name  
Internal\_result\_\_c

Custom  
✓

Singular Label  
Internal result

Plural Label  
Internal results

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

javascriptvoid(0);

Type here to search

14:45  
12-04-2023

## Milestone 2: Fields and Relationship

Semester | Salesforce

Welcome to Salesforce: Verify your identity

aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003711N/FieldsAndRelationships/page?address=%2F...

Search Setup

Star

+

?

Settings

Notifications

Profile

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Semester

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Semester Custom Field

Candidate

Back to Semester

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Candidate	Object Name	Semester
Field Name	Candidate	Data Type	Date/Time
API Name	Candidate__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	K SANTHOSH, 06/04/2023, 1:45 pm	Modified By	K SANTHOSH, 06/04/2023, 1:45 pm

General Options

Type here to search

Task View

Edge

File Explorer

Shopping

Mail

Calendar

WhatsApp

Chrome

Power BI

Chrome

ENG

14:46

12-04-2023

2



Semester | Salesforce

Welcome to Salesforce: Verify your identity

aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000371IN/FieldsAndRelationships/page?address=%2F...

Search Setup

Star, Plus, Home, Help, Settings, Notifications, Profile

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Semester

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Semester Custom Field

Semester

Back to Semester

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Semester	Object Name	Semester
Field Name	Semester	Data Type	Text
API Name	Semester__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	K.SANTHOSH, 29/03/2023, 12:16 pm	Modified By	K.SANTHOSH, 29/03/2023, 12:16 pm

General Options

Required

Type here to search

Taskbar icons: File Explorer, Mail, Teams, Chrome, etc.

System tray: Network, Volume, Date/Time (12-04-2023, 14:46)

## Milestone 3: Lightning App

## Activity :1

App Manager | Salesforce

Welcome to Salesforce: Verify your identity

aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name ⓘ

Semester

\* Developer Name ⓘ

Semester

Description ⓘ

App Branding

Image ⓘ

Upload

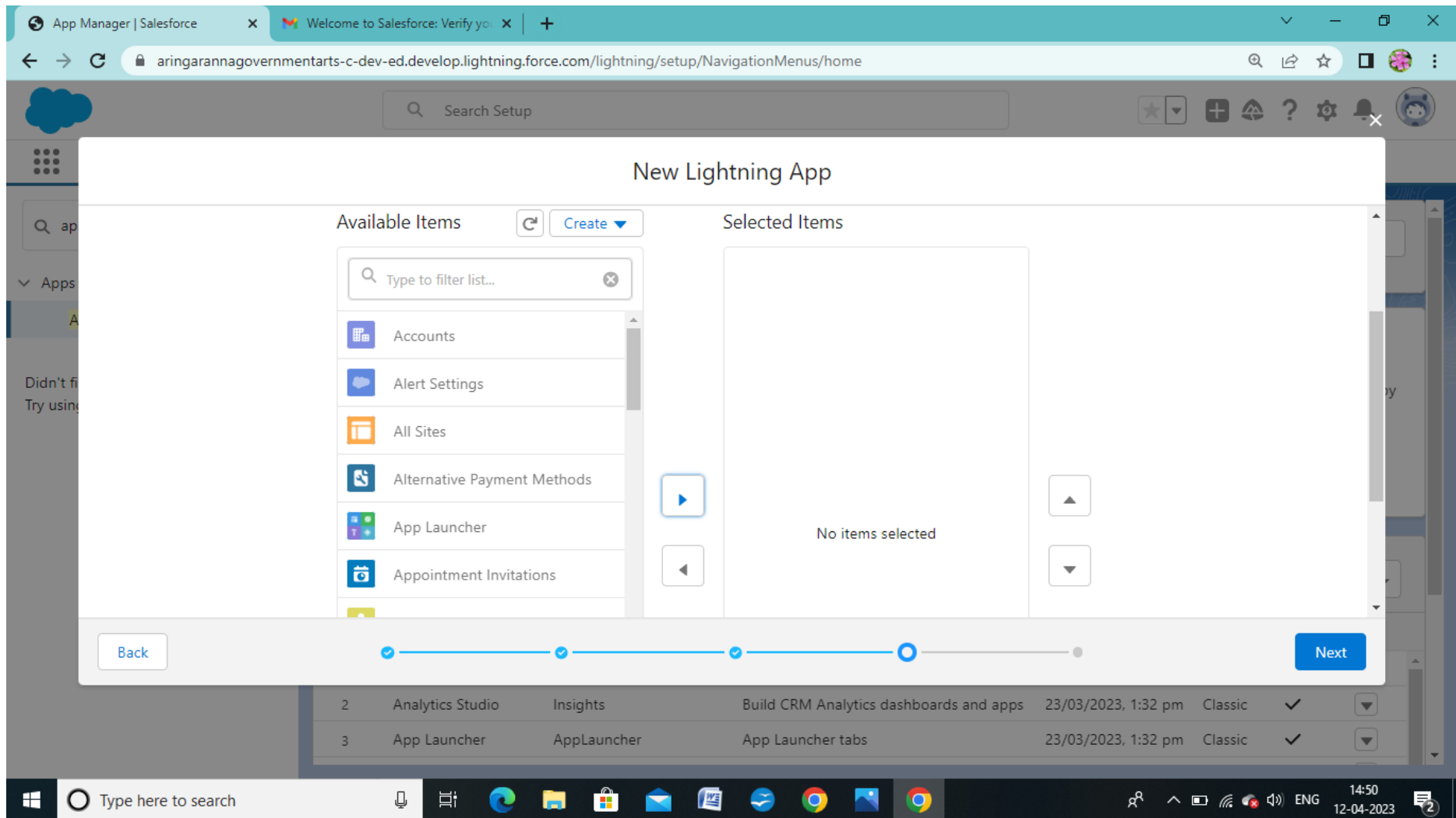
Primary Color Hex Value ⓘ

#0070D2

Next

2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	23/03/2023, 1:32 pm	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	23/03/2023, 1:32 pm	Classic	✓	





## Milestone 4: Users

## Activity 1:

The screenshot displays the Salesforce Setup interface for managing users. The left sidebar shows the 'Setup' menu with 'Home' and 'Object Manager' options. The main content area is titled 'Users' and includes a search bar and a list of links for user management. The 'User Detail' section for user 'K SANTHOSH' is expanded, showing various attributes and permissions.

**User Detail**

Name	K SANTHOSH	Role	
Alias	KSANT	User License	Salesforce
Email	<a href="mailto:santhoshks0402@gmail.com">santhoshks0402@gmail.com</a>	Profile	<a href="#">System Administrator</a>
Username	<a href="mailto:santhoshk@developer.com">santhoshk@developer.com</a>	Active	<input checked="" type="checkbox"/>
Nickname	santhoshk <a href="#">i</a>	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	Aringar Anna Government Arts College,Musiri	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>

The Windows taskbar at the bottom shows the search bar, task view button, and several application icons including Edge, File Explorer, and various productivity tools. The system clock indicates the time is 14:51 on 12-04-2023.

# Milestone – 5 Reports

Report Builder | Salesforce x Welcome to Salesforce: Verify yo x +

← → ↻ 🔒 aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXliLCJhdHRyaWJ1dGVzL...

Search...

Salesforce Chatter Home Chatter People Groups Files Reports

## Create Report

**Category**

Recently Used

**All**

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Select a Report Type

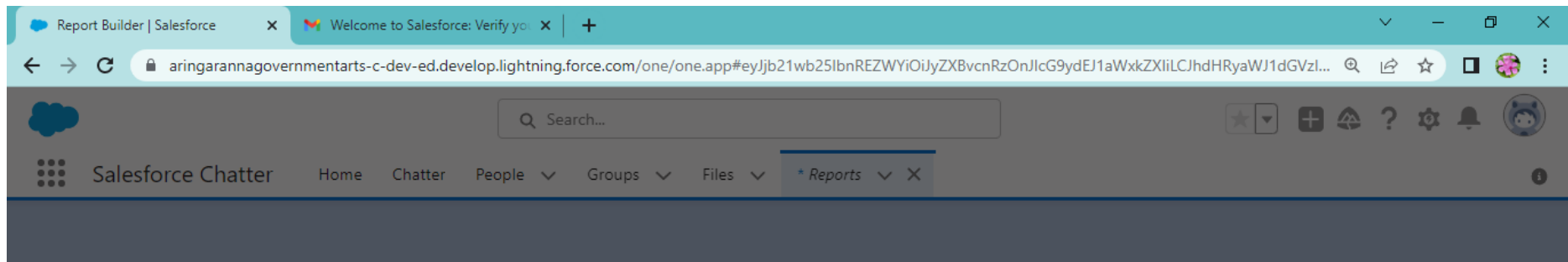
Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard

https://aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app#

Type here to search

ENG 14:54 12-04-2023



## Create Report

**Category**  
Recently Used  
**All**  
Accounts & Contacts  
Opportunities  
Customer Support Reports  
Leads  
Campaigns

**Select a Report Type**  

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard

**Details**  

**Accounts**  
Standard Report Type

Start Report

Details Fields (63)

**Created By You**  

**SANTHOSH CRM**  
Last Used 4/6/2023

https://aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app#

Report Builder | Salesforce

Welcome to Salesforce: Verify your identity

aringarannagovernmentarts-c-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzL...

Search...

Star

+

Share

?

Settings

Notifications

Avatar

Salesforce Chatter

HomeChatterPeopleGroupsFilesReport Builder

REPORT

SANTHOSH CRM

Accounts

↶↷

Add Chart

Save & Run

Save

Close

Run

Outline

Filters1

Groups

GROUP ROWS

Add group...

Columns

Add column...

Last Activity

Account Owner

Account Name

Billing State/Province

Type

Rating

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	K SANTHOSH	GenePoint	CA	Customer - Channel	Cold	23/03/2023
2	-	K SANTHOSH	United Oil & Gas, UK	UK	Customer - Direct	-	23/03/2023
3	-	K SANTHOSH	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	23/03/2023
4	-	K SANTHOSH	Edge Communications	TX	Customer - Direct	Hot	23/03/2023
5	-	K SANTHOSH	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	23/03/2023
6	-	K SANTHOSH	Pyramid Construction Inc.	-	Customer - Channel	-	23/03/2023
7	-	K SANTHOSH	Dickenson plc	KS	Customer - Channel	-	23/03/2023
8	-	K SANTHOSH	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	23/03/2023
9	-	K SANTHOSH	Express Logistics and Transport	OR	Customer - Channel	Cold	23/03/2023
10	-	K SANTHOSH	University of Arizona	AZ	Customer - Direct	Warm	23/03/2023
11	-	K SANTHOSH	United Oil & Gas Corp.	NY	Customer - Direct	Hot	23/03/2023
12	-	K SANTHOSH	sForce	CA	-	-	23/03/2023

Type here to search

Taskbar icons: File Explorer, Mail, Calendar, Chrome, etc.

14:56 12-04-2023



# Milestone:6 Dashboards:

The screenshot shows the Salesforce Dashboards interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a breadcrumb trail: Home > Chatter > People > Groups > Files > Report Builder > Dashboards. The main content area is titled 'Dashboards' and 'Recent' (3 items). It features a search bar for recent dashboards and buttons for 'New Dashboard' and 'New Folder'. A table lists the recent dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Copy of CANDIDATE BOARD		Private Dashboards	K SANTHOSH	6/4/2023, 2:24 pm	
Created by Me	CANDIDATE BOARD		Private Dashboards	K SANTHOSH	6/4/2023, 2:18 pm	
Private Dashboards	SANTHOSH.K		Private Dashboards	K SANTHOSH	29/3/2023, 1:52 pm	

Below the table, there are sections for 'FOLDERS' (All Folders, Created by Me, Shared with Me) and 'FAVORITES' (All Favorites). The bottom of the image shows the Windows taskbar with the search bar and several application icons.

Trailhead Profile Public URL

Team Lead- <https://trailblazer.me/id/mathv7>

Team Member 1- <https://trailblazer.me/id/n20034>

Team Member 2- <https://trailblazer.me/id/santk45>

Team Member 3- <https://trailblazer.me/id/sath37>

## PROJECT REPORT TEMPLATE

### 5. ADVANTAGES & DISADVANTAGE

The advantages of a business using a CRM system greatly outweigh the disadvantages. However, there are pitfalls. For a CRM system to work, there needs to be buy-in across the organisation and the processes in place to support it. Otherwise, your CRM may end up being an expensive waste of time. Here, we take a look at the strategic pros, cons, and importance of CRM.

### Pros

It allows for the consolidation of customer data and the basis for deep insights.

- It speeds up the sales conversion process.
- It increases staff productivity, lowering time-cost.
- It allows geographically dispersed teams to collaborate effectively.

Improves customer experience by allowing personalisation and improved query resolution.

## 6. APPLICATIONS

CRM's free edition can support up to 3 users and offers critical features that a business of that size needs. This includes leads, deals, and

contact management, tasks and events, multichannel marketing, integrations to other Zoho apps, and more! For more information, check out the full feature list.

## 7. CONCLUSION

CRM in retail **allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases**. By implementing a CRM into your retail sales process, you can enhance customer relationships by providing personalized service that caters to their individual needs

## 8. FUTURE SCOPE

**Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging.** The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.