

GOVERNMENT ARTS COLLEGE FOR WOMEN

SALEM – 08.

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IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1. INTRODUCTION

1.1 Overview

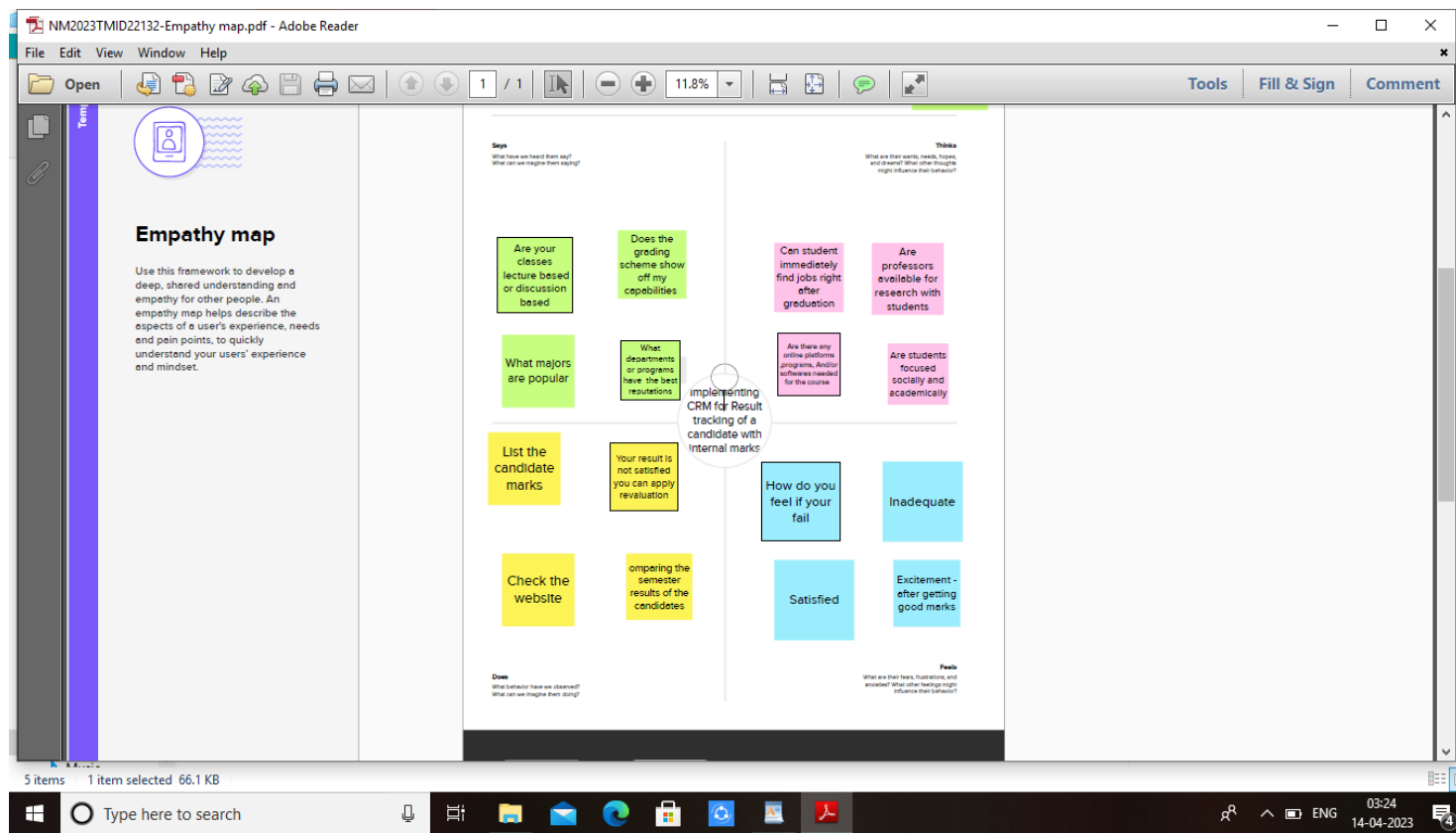
Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer, Lecturer should have the ability to create Internal Results, dean, who is one of the Lecturer, should be the only one with ability to update Internal Results, Re-evaluation can be initialized by Candidate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

1.2 PURPOSE

It aims to produce design area time knowledge of the salesforce and how can we build a app using salesforce in this project we build a candidate Results card application for educational institutions , which would be useful for the staffs to reduce time and track the performance of the students with ease it is helpful to have large numbers of data maintained under one platform.

2.PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP

The screenshot displays a PDF document titled "NM2023TMID22132-Brainstorming & idea prioritization.pdf" in Adobe Reader. The document contains a brainstorming map with four main sections, each represented by a name and a collection of yellow sticky notes:

- Aarthi A**
 - Choosing the wrong vendor
 - Candidates marks are missing
 - CRM may not suit all business
 - Focused on wrong persons
- Gayathri R**
 - Security and data production issues with centralised data
 - The excesses initial time and productivity cost at the implementation
 - Put the password security
 - Need atechanical skills related persons
- Vimala S**
 - Shut it down
 - Avoid lack of knowledge and concentration
 - Install an anti-spyware pacakage
 - Expensive implementation
- Janani T**
 - Open-ended questions are difficult
 - Focused on the wrong person
 - can be costly
 - A if used incorrectlywaste of time

The interface includes a top menu bar (File, Edit, View, Window, Help), a toolbar with various icons, and a right sidebar with "Tools", "Fill & Sign", and "Comment" options. The bottom status bar shows "1 item", "1 item selected 103 KB", and a Windows taskbar at the very bottom with the search bar and system clock (03:30, 14-04-2023).

NM2023TMID22132-Brainstorming & idea prioritization.pdf - Adobe Reader

File Edit View Window Help

Open [Icons] 1 / 1 [Icons] 12.5% [Icons] Tools Fill & Sign Comment

20 minutes

20 minutes

200.00 x 64.64 in

1 item 1 item selected 103 KB

Type here to search

03:31 14-04-2023

3.RESULTS

MILESTONE 1: Creation Salesforce Org:

➤ ACTIVITY:

CREATING DEVELOPER ACCOUNT

→ Go to developer.salesforce.com/

→ Click sign up

→ Enter the details:

First Name & Last name, Email, Role: Developer, Company Name: GACW, Country: India, Postal code, Username: as like username@organisation.com

→ Sign up

You receive the mail for account activation. Go to salesforce and click login

→ Enter username and password.

Welcome to Salesforce: Verify yo x +

mail.google.com/mail/u/0/#all/FMfcgzGslbBmJImBFtRHDMDBdqxJkZFB

Gmail

Search mail

Compose

Inbox 105

Starred

Snoozed

Sent

Drafts 13

Less

Important

Chats

Scheduled

All Mail

Spam 1

Bin

Categories

Manage labels

Create new label

29 of 503

developer@salesforce.com <developer@salesforce.com> Sat, 11 Mar, 18:36

to me

salesforce

Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

Type here to search

27°C Mostly sunny

ENG IN 09:06 16-04-2023

➤ **ACTIVITY:**

OBJECT

To create an object:

- Click on gear icon→click setup.

- From the setup page→click on Object manager→click on create→click on custom object→ Enter the label name, plural name→ click on Allow reports→ Allow search→save.
- Now create a custom tab.
- Click the home → tabs → Click New→Object: Semester→Tab style:Any icon→Next→Next→Save.

Home | Salesforce

Tabs | Salesforce

+

governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Didn't find what you're looking for?
Try using Global Search.

SETUP

Tabs

Custom Tabs






Help for this Page

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

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Candidates	 People	
Edit Del	Courses	 Laptop	
Edit Del	Internal results	 Hands	
Edit Del	Lecturers	 Globe	
Edit Del	semesters	 Books	


Web Tabs

New What Is This?

No Web Tabs have been defined

https://governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/one/one...

Type here to search



13:04

14-04-2023

MILESTONE 2: FIELDS AND RELATIONSHIP

➤ ACTIVITY:

To create fields in an object:

- Setup→Object manager→Fields and relationship→Data type: Text or Look up→Field label:Semester name→Next→Next→Save.

OBJECT NAME	Fields in the object	
Semester	Field label	Data type
	Semester name	Text
	Course detils	Lookup

Candidate	Field label	Data Type	
	Candidate Name	Text	
	Candidate Id	Text	
	Semester Name	Text	
	Internal Results	Lookup	
Course Detail			
	Field label	Data type	
	Course name	Text	
Lecturer details	Course id	Text	
	Field label	Data type	
	Lecturer role	Text	
	Lecturer name	Text	
	Course id	Text	

	Course details	Lookup
Internal marks		
	Field label	Data Type
	Candidate ID	Text
	Course ID	Text
	Marks	Text

MILESTONE 3:LIGHTNING APP

➤ ACTIVITY:

To create a lightning app page:

- Go to setup page→search “app manager” in quick find→select “app manager”→click New Lightning App.

Home | Salesforce x App Manager | Salesforce x

governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app m

Apps

App Manager

User Interface

App Menu

Didn't find what you're looking for? Try using Global Search.

SETUP Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		11/03/2023, 6:34 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	11/03/2023, 6:34 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	11/03/2023, 6:34 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed f...	11/03/2023, 6:36 pm	Lightning	✓
5	Candidate Internal Result Ca...	Candidate_result_card		20/03/2023, 6:51 pm	Lightning	✓

https://governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/one/one.app#/setup/NavigationMenus/home

Type here to search

02:08 16-04-2023

- Fill the app name in app details and branding→Next→(app option page) keep it as default →Next→(utility items) keep it as default→Next→(add navigation items)→Next→(add user profile) add system administrator→Next.

- To add navigate items: select the items from the search bar and move it using the arrow button→Next.

The screenshot displays the Lightning App Builder interface for configuring navigation items. The browser address bar shows the URL: `governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000003gtQ5AAI&retUrl=https%3A%2F%2Fgovernmentart...`. The top navigation bar includes links for Lightning App Builder, App Settings, Pages, and the current app, Candidate Internal Result Card.

On the left, the **App Settings** sidebar is visible, with the following options: App Details & Branding, App Options, Utility Items (Desktop Only), **Navigation Items** (selected), and User Profiles.

The main content area is titled **Navigation Items** and contains the following text: "Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support."

The interface is divided into two main sections:

- Available Items:** A list of items that can be added to the navigation bar. It includes a search bar with the placeholder text "Type to filter list...". The list contains the following items:
 - Accounts
 - Alert Settings
 - All Sites
 - Alternative Payment Methods
 - App Launcher
 - Appointment Invitations
 - Approval Requests
 - Asset Action Sources
- Selected Items:** A list of items that have been added to the navigation bar. It includes a search bar and the following items:
 - semesters
 - Candidates
 - Courses
 - Lecturers
 - Internal results

Arrows between the two lists allow for moving items from Available to Selected or vice versa. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

To add user profiles: search profiles in search bar →click on the arrow button→save& finish.

The screenshot displays the Salesforce Lightning App Builder interface for configuring user profiles. The browser address bar shows the URL: `governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000003gtQ5AAI&retUrl=https%3A%2F%2Fgovernmentart...`. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Candidate Internal Result Card'. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles' (which is selected). The main content area is titled 'User Profiles' and contains the instruction: 'Choose the user profiles that can access this app.' It is divided into two panels: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' panel has a search bar with the placeholder text 'Type to filter list...' and a list of profiles: 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Authenticated Website', 'Contract Manager', 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile', and 'Customer Community Login User'. The 'Selected Profiles' panel shows 'System Administrator' as the only selected profile. Between the two panels are two arrow buttons for moving profiles. The Windows taskbar at the bottom shows the search bar, task view, and several application icons, with the system clock indicating 15:57 on 14-04-2023.

MILESTONE 4: USERS

➤ ACTIVITY:

- To create users profile:

From setup→Users→New users→Enter username, email address→select Role: none→select user licence: salesforce→select profile: salesforce user.

Check generate new password and notify the user immediately to have the user's login name and a temporarily password emailed to your email.

Users | Salesforce

governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GCL2d%2Fe%3FisUserEntityOverri...

Search Setup

SetupHomeObject Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

SETUP

Users

User Edit

Gayathri R

Help for this Page

User Edit

SaveSave & NewCancel

General Information

= Required Information

First Name

Gayathri

Last Name

R

Alias

ggaya

Email

gayathriramesh559@gmail.c

Username

gayathriramesh559@gmail.c

Nickname

User1679319703699928338

Title

Implementing CRM

Company

gacwsalem636008

Department

statistics

Division

Role

<None Specified>

User License

Salesforce

Profile

Custom: Sales Profile

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

Type here to search

16:03

14-04-2023

Milestone 5: REPORTS

➤ ACTIVITY:

To create a report:

- Click on the gear icon.
- Go to the app→click on the report tabs→New report→Select report type panel→Start report→customise your report→save.

Home | Salesforce x Home | Salesforce x Report Builder | Salesforce x +

governmentartscollegefor-1f-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000D9SRfEAN/edit

Search...

Candidate Internal ... semesters Candidates Courses Lecturers Internal results * Report Builder * Dashboards * Gayathri R

REPORT New Candidates Report Candidates Save & Run Save Close Run

Outline Filters 1

Groups

GROUP ROWS

Add group...

Candidate: ID

GROUP COLUMNS

Add group...

Columns

Add column...

Candidate: Candidate Name

Semester Name

Internal result

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

Candidate: ID	Candidate: Candidate Name	Semester Name	Internal result
a012w00001Cj4h7 (1)	Gayathri R	4 Semester	PASS
Subtotal			
a012w00001Cj4h8 (1)	Bhavadharani N	4 Semester	PASS
Subtotal			
a012w00001Cj4h9 (1)	Indhu s	4 Semester	PASS
Subtotal			

Row Counts Detail Rows Subtotals Grand Total

Type here to search

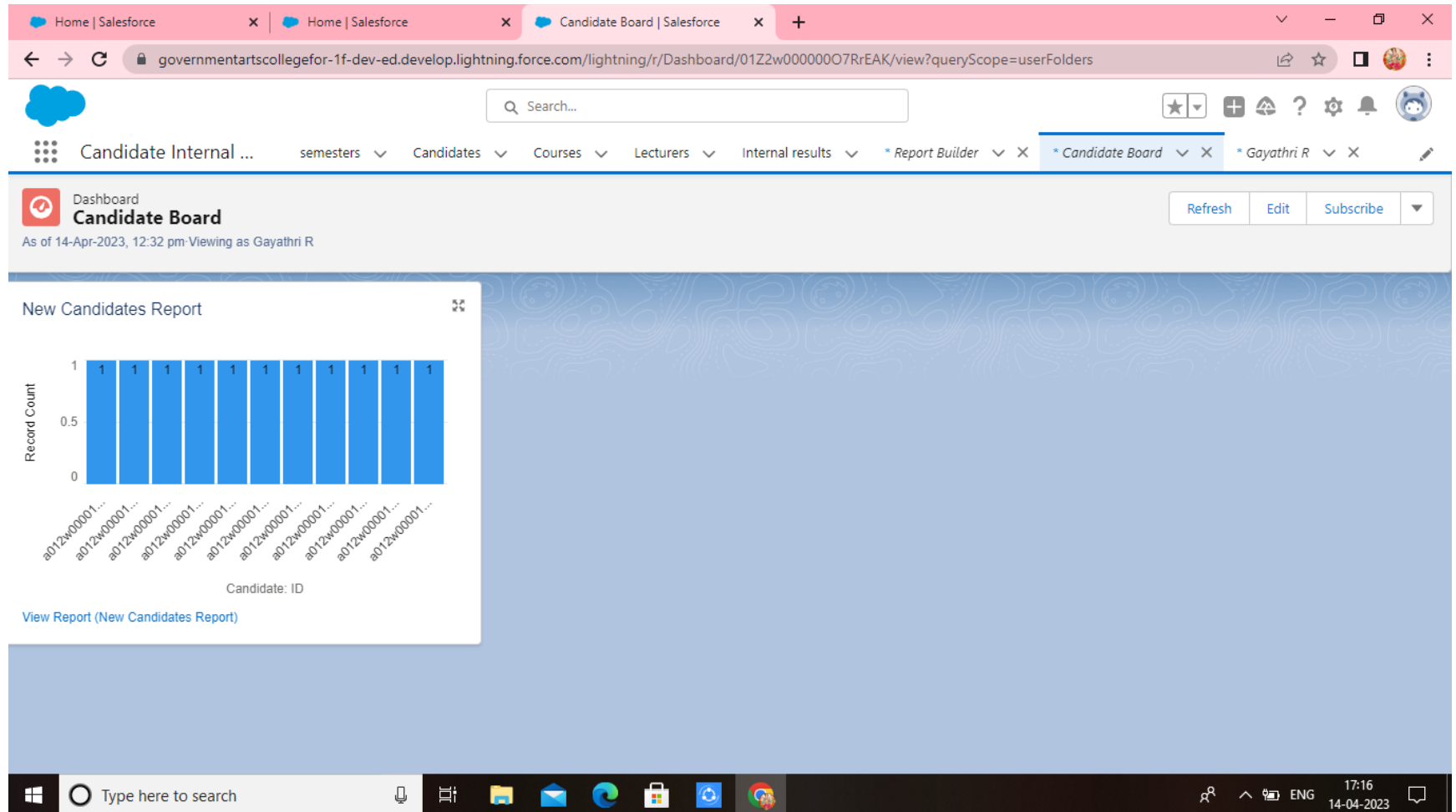
17:15 14-04-2023

MILESTONE 6 :DASHBOARD

➤ ACTIVITY

To create a dashboard:

Click dashboard→New→Name: Candidate board→ leave all fields→Create→click + component→Reports: Candidate marks→click select→Display as: Vertical bar chart→click add→save→done.



4. TRAILHEAD PROFILE PUBLIC URL

Team Lead - <https://trailblazer.me/id/gayar27>

Team Member 1- <https://trailblazer.me/id/aarta24>

Team Member 2- <https://trailblazer.me/id/janat17>

Team Member 3- <https://trailblazer.me/id/vammu12>

5. ADVANTAGES

- Allows for easier collaboration
- Improve work Efficiency through Automation
- Centralised and Organised data
- Get Intelligent Notification and Reminders from AI

DISADVANTAGES

- Security and data protection issues with centralized data
- Mistaken tool choice make CRM more complicated
- Especially careful questionnaire design is required
- Needs additional management to maintain

6.APPLICATION

- ❖ Sales Marketing
- ❖ ERP Finance
- ❖ Analysis Reporting
- ❖ Relation Management

7. CONCLUSION

- The Customer Relationship Management has simplified the handling of customers in many industries.

- Therefore , after few years CRM will be the important and better process for Customer Management .

8. FUTURE SCOPE

- Customer Intelligence Is king
- Artificial Intelligence , Business Intelligence and Beyond
- CRM as a single source of Truth
- Personalization Is Key