

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1 INTRODUCTION

1.1 Overview

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, sales operations, and marketing campaigns. Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this.

1) if we create Salesforce developer organization in first milestone.

2) if we create activation application in second milestone and create custom object

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

3) if we create fields and relationship in third milestone

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.

4) if we create candidate internal result card app in third milestone.

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.

5) if we create users in fourth milestone

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.

6)if we create reports in fiveth milestone

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

7) if we create dashboards in sixth milestone

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.

1.2 Purpose

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 initialised by Candidate for all Internal Results.Now only dean can update the marks after re- evaluation.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map

**RESULT
TRACKING
INTERNAL
ASSESSMENT**

```
graph TD; A[RESULT TRACKING INTERNAL ASSESSMENT] --> B[UPDATE THE INFORMATION OF THE STUDENTS]; B --> C[ERROR FREE TRACKING PROCCES]; C --> D[RESPONSIBLITES CAUTIOUS COMMITED TO RUN SMOOTHLY]; D --> E[CHECK THE RESULTS GAINED WITH ACCURECY];
```

The diagram is a vertical flowchart with five rectangular boxes connected by lines. The boxes are arranged from top-left to bottom-right. The first box is orange, the second is blue, the third is orange, the fourth is red, and the fifth is green. Each box contains bold, black, uppercase text. The connections are as follows: a horizontal line from the right side of the first box to a vertical line that goes down to the top of the second box; a horizontal line from the right side of the second box to a vertical line that goes down to the top of the third box; a horizontal line from the right side of the third box to a vertical line that goes down to the top of the fourth box; and a horizontal line from the right side of the fourth box to a vertical line that goes down to the top of the fifth box.

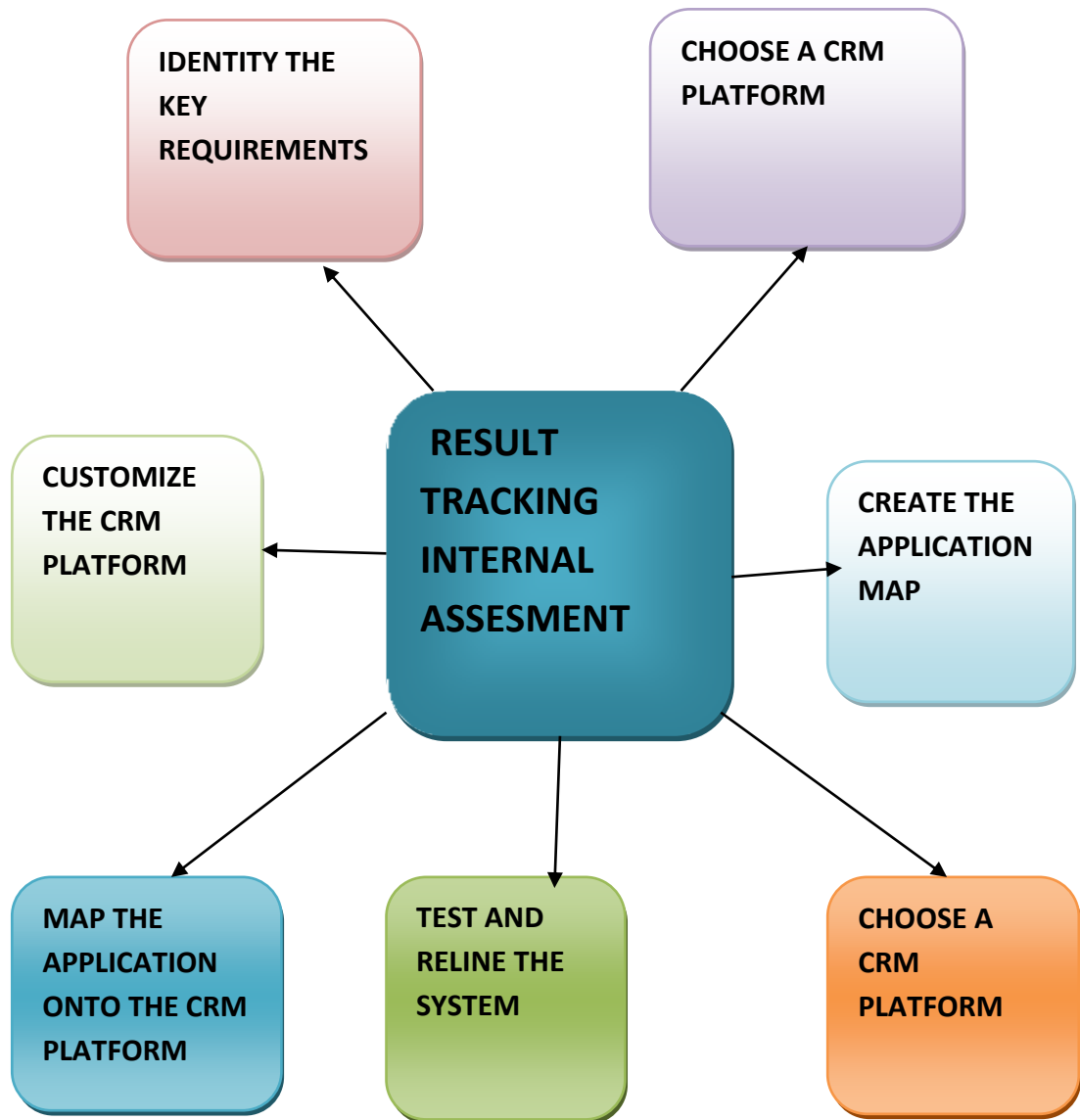
**UPDATE THE
INFORMATION
OF THE
STUDENTS**

**ERROR FREE
TRACKING
PROCCES**

**RESPONSIBLITES
CAUTIOUS COMMITED
TO RUN SMOOTHLY**

**CHECK THE
RESULTS GAINED
WITH ACCURECY**

2.2 Ideation & Brainstorming Map



Identify the key requirements:

First you need to identify the key requirements for the CRM system. These might include the ability to track candidate results and internal marks, view and manage candidate data, generate reports, and automate workflows.

Choose a CRM platform:

Once you have identified the key requirements, you need to choose a CRM platform that can meet those requirements. Some popular CRM platforms include Salesforce, HubSpot, and Zoho CRM.

Customize the CRM platform:

After choosing a CRM platform, you need to customize it to meet your specific needs. This might involve creating custom fields and workflows, setting up data integrations, and configuring security settings.

Create the application map:

Next, you need to create an application map that outlines the key steps in the candidate result tracking process. This might include steps like entering candidate data, recording internal marks, generating reports, and communicating with candidates

Map the application onto the CRM platform:

Once you have created the application map, you need to map it onto the CRM platform. This might involve setting up custom workflows, automating data entry and reporting, and integrating the CRM with other systems.

Test and refine the system:

Finally, you need to test and refine the system to ensure that it is working properly. This might involve conducting user testing, troubleshooting issues, and making adjustments to the application map or CRM platform as needed. .

3 RESULT:

3.1 DATA MODEL:

Object Name	Fields in the Relationships	
Obj 1		
	Field Lable	Data Type
	Account	Text(80)
	Owner	Lookup(Group,User)

3.2 Activity&screenshot

Activity 1:

Creating Developer Account

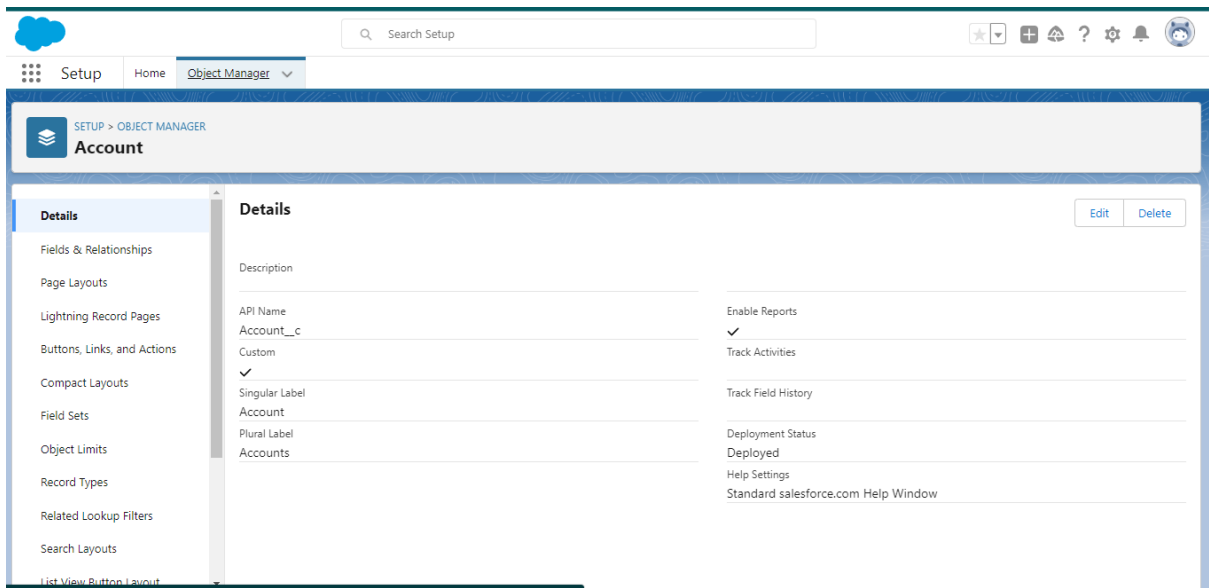
Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer
 - c. Company : College Name
 - d. County : India
 - e. Postal Code : pin code
 - f. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

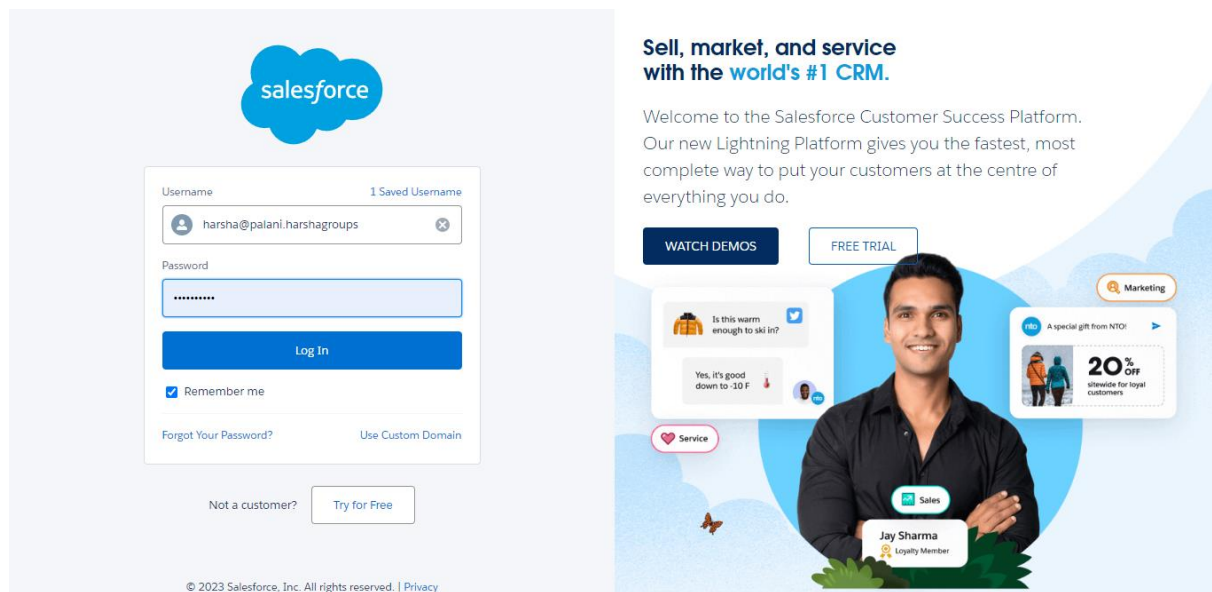
username@organization.com

Click on sign up after filling these

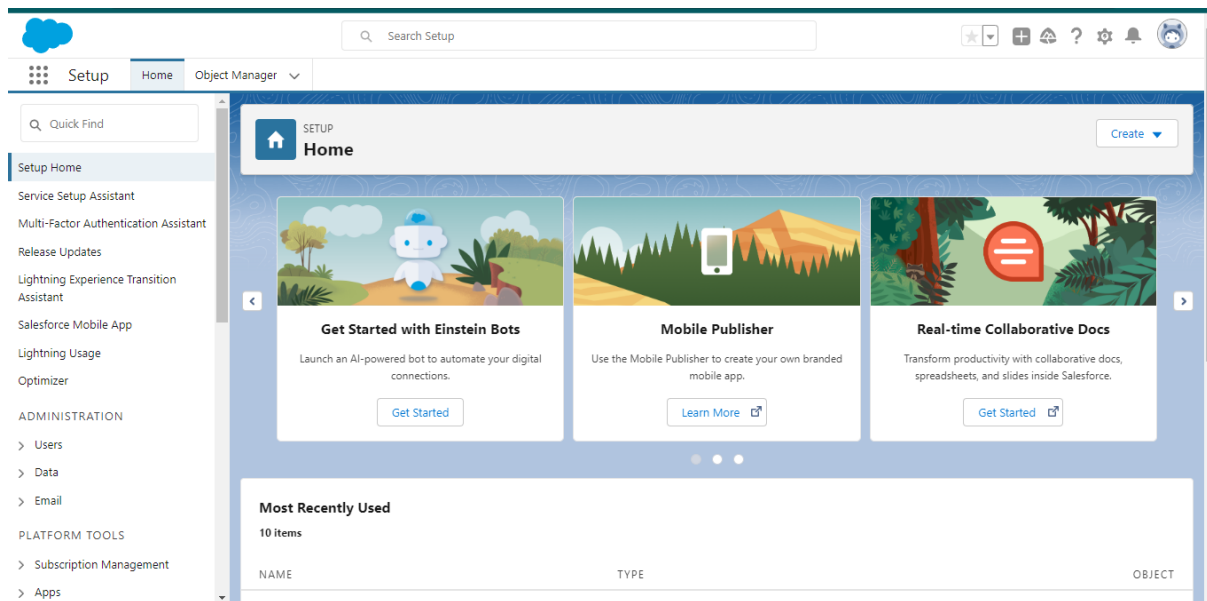


Login To Your Salesforce Account

1. Goto salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Salesforce Login
<https://login.salesforce.com>



Milestone-2:Object

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

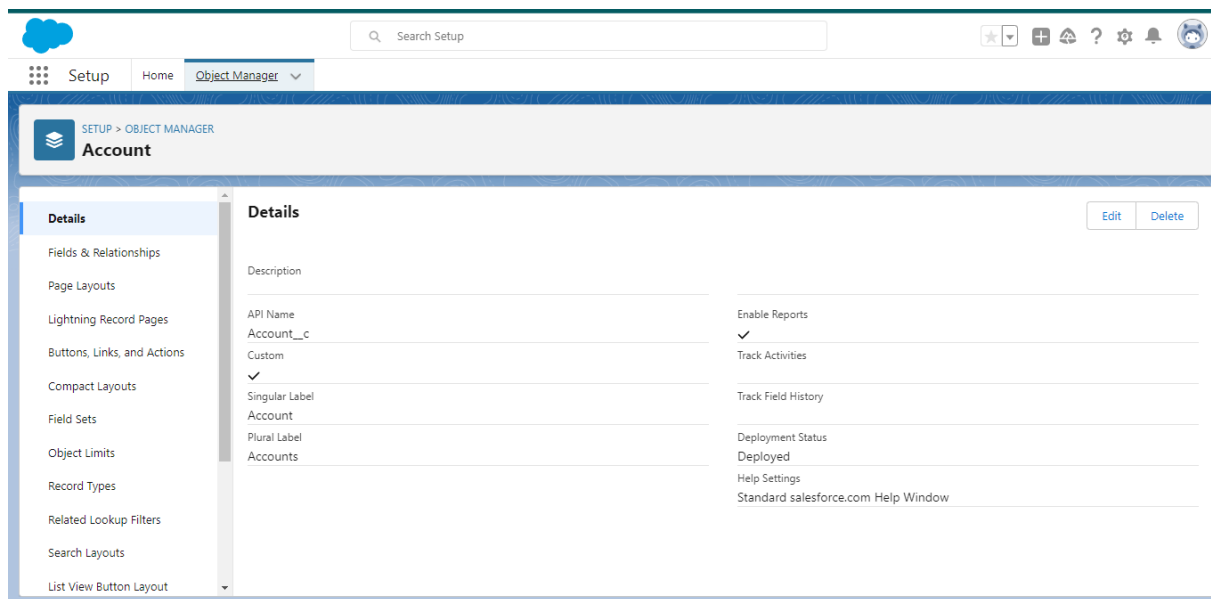
Tabs.

- 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.

To Navigate to Setup page:

Click on gear icon → click setup.

To



Milestone -2:Fields and Relationship

Activity-1:

Creation of fields:

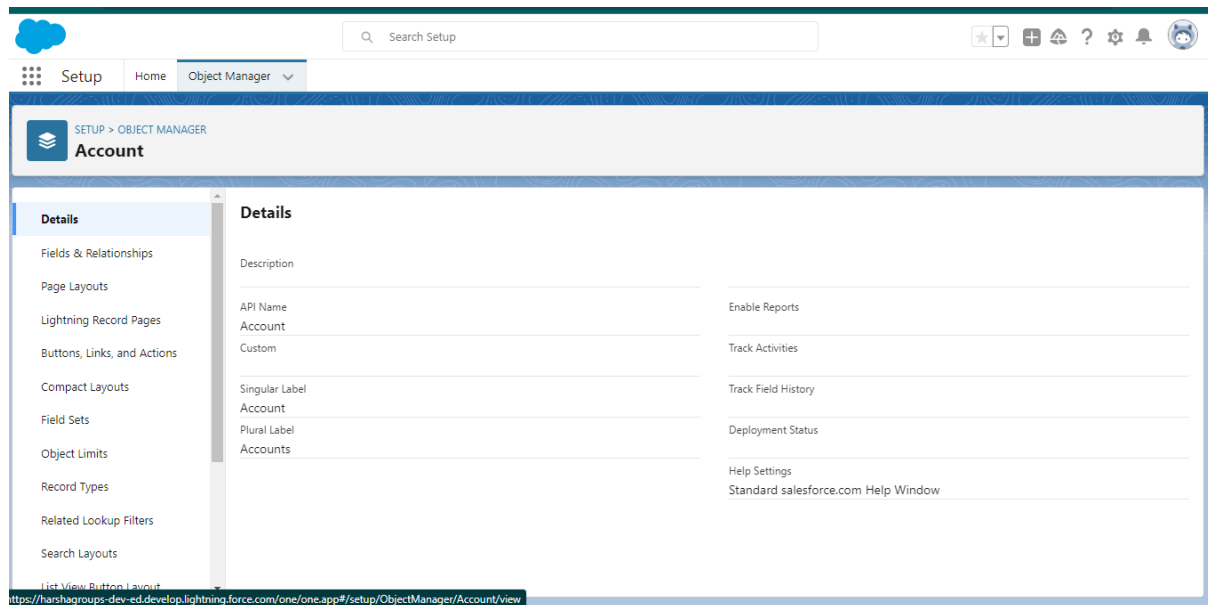
- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Semester.
- Select Fields & Relationships from the left navigation, and click New

Now ready to make a custom field. Let's do this!

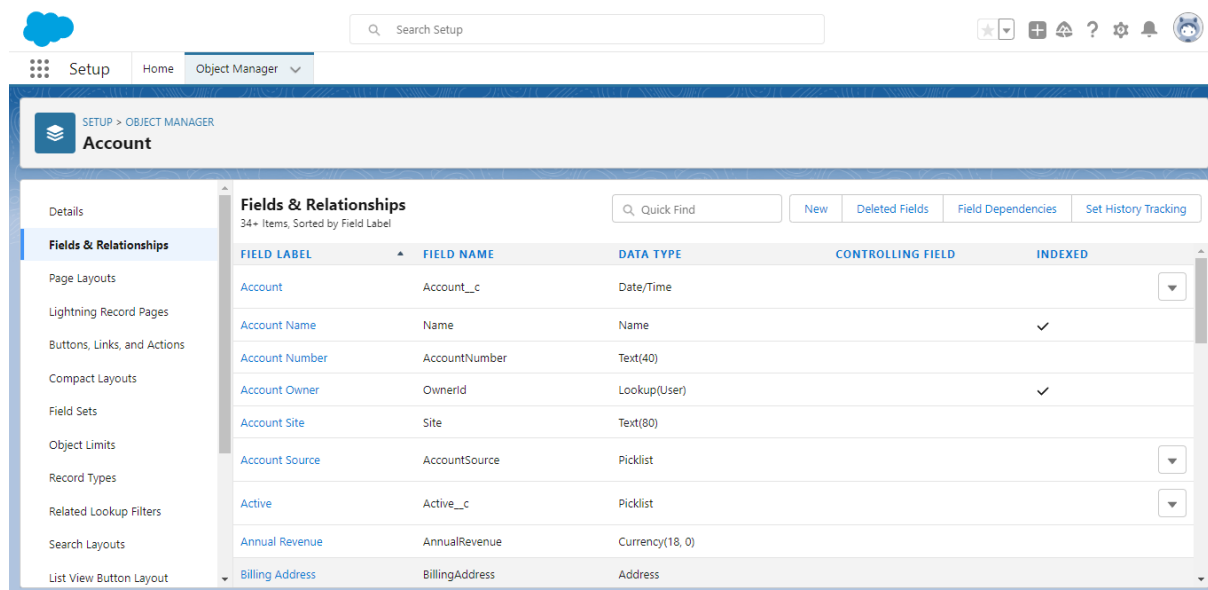
- Select the Text as the Data Type, then click Next.
- For Field Label, Enter Semester Name.
- Click Next, Next, then Save

To create fields in an object:

Go to setup → click on Object Manager → type object name in search bar → click on the object.



Now click on “Fields & Relationships” → New



Activity-2 :Similarly Create following according to the objects.

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

Profile

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Account Custom Field

semester

Back to Account Fields

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	semester	Object Name	Account
Field Name	semester	Data Type	Date/Time
API Name	semester__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	gomathi R	Modified By	gomathi R
	27/03/2023, 2:52 pm		27/03/2023, 2:52 pm

General Options

Required

Default Value

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

Profile

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Account Custom Field

candidate

Back to Account Fields

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	Account
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	gomathi R	Modified By	gomathi R
	28/03/2023, 10:31 am		28/03/2023, 10:31 am









General Options

Required

Default Value



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Account Custom Field

COURSE

Back to Account Fields

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	course	Object Name	Account
Field Name	course	Data Type	Date/Time
API Name	course__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	gomathi R	Modified By	gomathi R
	28/03/2023, 10:36 am		28/03/2023, 10:36 am


General Options

Required☐









Default Value

Help for this Page

Click View Button Layout
<https://gomathigroups-dev-ed.develop.lightning.force.com/lightning/setup/Objec...>



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Account Custom Field

lecturer

Back to Account Fields

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

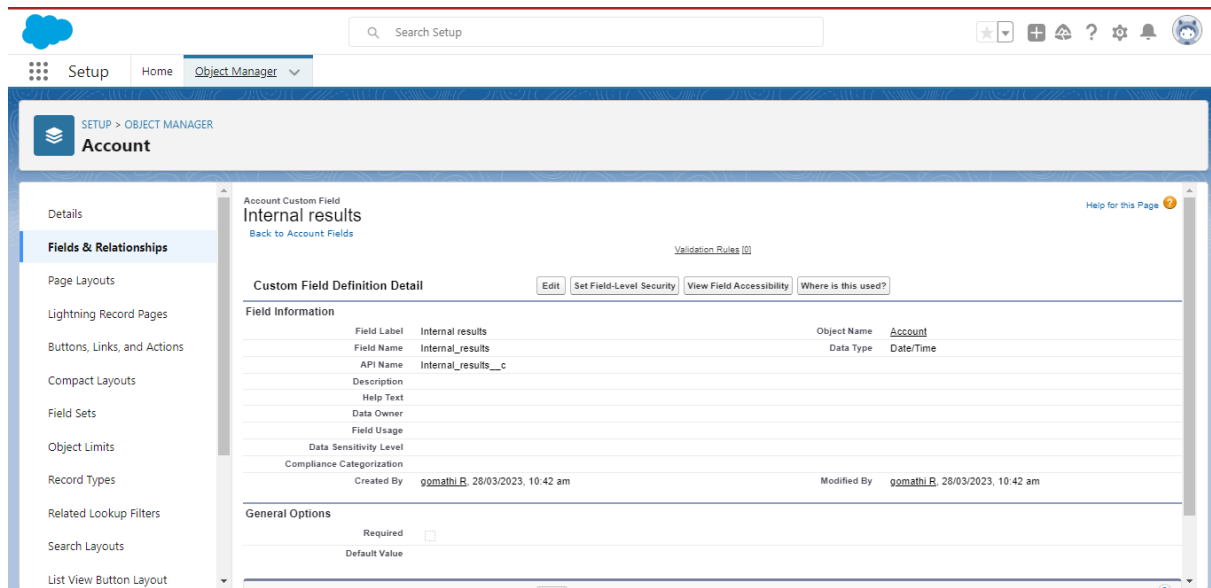
Field Label	lecturer	Object Name	Account
Field Name	lecturer	Data Type	Date/Time
API Name	lecturer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	gomathi R	Modified By	gomathi R
	28/03/2023, 10:38 am		28/03/2023, 10:38 am

General Options

Required☐

Default Value

Help for this Page



Milestone -3: Lightning app

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,LecturerDetails,InternalResults 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.

To create a lightning app page:

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

Search Setup

Setup Home Object Manager

Q app ma

Apps

App Manager

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

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...
11	Marketing	Marketing	Best-in-class on-demand marketing automation	21/03/2023, 10:40 am	Classic	✓
12	Platform	Platform	The fundamental Lightning Platform	21/03/2023, 10:40 am	Classic	✓
13	Queue Management	QueueManagement	Create and manage queues for your business.	21/03/2023, 10:40 am	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) soluti...	21/03/2023, 10:40 am	Classic	✓
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportuniti...	21/03/2023, 10:43 am	Lightning	✓
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple rec...	21/03/2023, 10:40 am	Lightning	✓
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and ...	21/03/2023, 10:40 am	Classic	✓
18	Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	21/03/2023, 10:42 am	Lightning	✓
19	Service	Service	Manage customer service with accounts, contacts, cases, and...	21/03/2023, 10:40 am	Classic	✓
20	Service Console	LightningService	(Lightning Experience) Lets support agents work with multipl...	21/03/2023, 10:40 am	Lightning	✓
21	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-dr...	21/03/2023, 10:40 am	Classic	✓
22	Subscription Mana...	RevenueCloudConsole	Get started automating your revenue processes	21/03/2023, 10:40 am	Lightning	✓

Milestone-4:Users

Creating a Activity 1:

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.

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

Ann Menu

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00d2w00000rd2eavvuhwn1bindkm@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	P. Harshavarthini	HP	harsha@ealeni.harsha@oouos		✓	System Administrator
<input type="checkbox"/> Edit	P. Harshavarthini	hp	harsha@ealeni.kumar2003@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rd2eav.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insophitssecurity@00d2w00000rd2eav.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Milestone-5 :Reports

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.

To create a report:

Go to the app → click on the reports tab

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, and More. A search bar is located in the top right. Below the navigation bar, the 'Reports' section is active, showing a 'Recent' list of 2 items. A sidebar on the left contains filters for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main table lists the following reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	harsha		Public Reports	Harshavarthini P	28/3/2023, 1:58 pm	
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	20/3/2023, 1:22 pm	

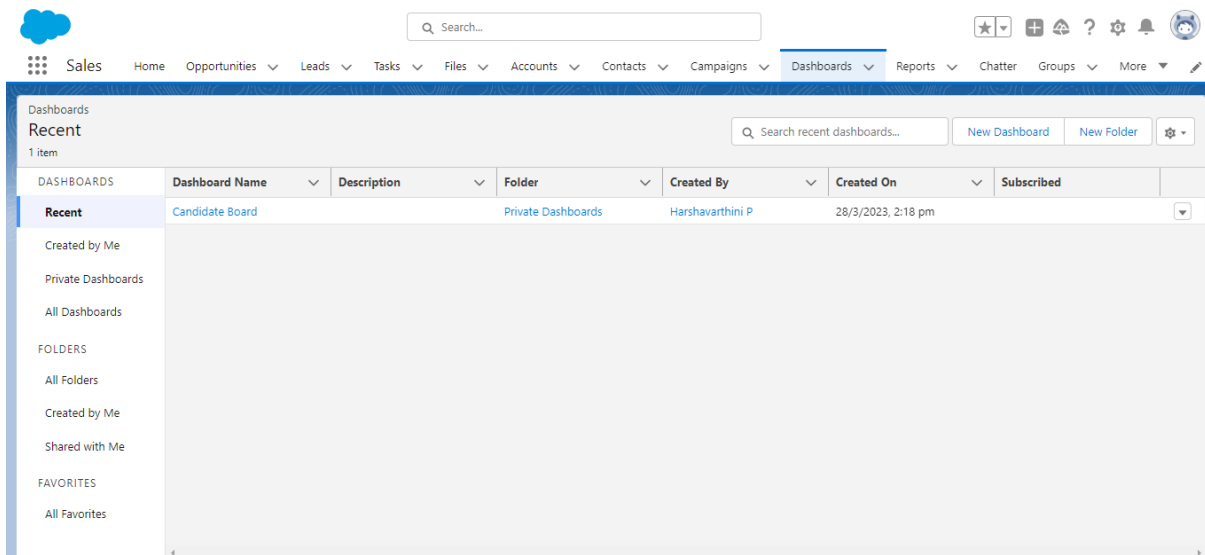
At the bottom left, there is a 'To Do List' icon.

Milestone-6:Dashboards

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 Marksby 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/harsp27>

Team Member 1 – <https://trailblazer.me/id/gomar20>

Team Member 2 – <https://trailblazer.me/id/bshree39>

Team Member 3 – <https://trailblazer.me/id/dpriya124>

5 ADVANTAGES & DISADVANTAGE

Advantages:

It allows for more effective sales and marketing. It can speed up the sales conversion process. It increases staff productivity, lowers time costs and boosts morale. It enables widely dispersed teams to work closely.

Can improve customer loyalty through exceptional experience.

The CRM software also lets a business tailor its marketing communications to achieve more effective results and , hence , a greater return on investment in sales and marketing.

A CRM system integrated within a marketing campaign allows insights into the interests of prospective customers.

All of this fits neatly in with the kind of lean management practices that high-performing businesses utilize.

Disadvantage:

Staff over-reliance on CRM may diminish customer loyalty through a bad experience.

Security concerns associated with centralized data.

The excess initial time and productivity cost of implementation.

It requires a process-driven sales organization.

It may not suit every business.

6 APPLICATION

Applicant tracking system (ATS) and candidate relationship management (CRM) software both help automate, organize, and optimize the recruitment and hiring process but knowing how, when and why to integrate each of these tools into a talent acquisition strategy is key to maximizing their value.

7 CONCLUSION

Administrator should be able to create all base data including semester, candidate , course, lecture, should have the ability to create Internal Results , Dean, who is one 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.

8 FUTURE SCOPE

The improved features of CRM software have increased both its complexity and necessity.

Nearly half of CRM implementation campaigns suffer from improper preparation and misaligned objectives among internal stakeholders.

A properly conceived CRM implementation strategy covers the breakdown of its goals, research, strategy, development and future.

This article is for small business owners who want to make sure they are taking the right steps when implementing a new CRM system.

Customer relationship management (CRM) software has evolved from a tool that helped sales teams store customer data into a multifaceted hub that drives the technology suite of an entire business.

It can add tremendous value to your company, but how well you integrate it with your preexisting processes will dictate its effectiveness.

The best implementation practices include focusing on your established goals, employing a dedicated team to lead the implementation, and offering training opportunities that help employees understand how to use the software when it launches.

